Help Guide (Legacy Interface)

Version 21.2.0

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Contents

Welcome **100**

What's New **101**

Version 21.2 101

Version 21.1 101

Exploring the User Interface **103**

Main Window at a Glance 103

Social Security Number (SSN) Handling 105

Granting/Preventing SSN Viewing Access for Staff Members 106

To grant or prevent SSN viewing access for a Staff Member: 106

Granting/Preventing SSN Viewing Access for Instructor Groups and Admissions Rep Groups 107

To grant or prevent SSN viewing access for Instructor Groups or Admissions Rep Groups: 107

Forms Containing SSN that are Configuration-driven 108

Forms on which SSN is Replaced with Student Number 109

Forms on which SSN is Hidden from View 110

Common Tasks 111

General (Multimodule) Tasks 111

Contact Manager 112

Admissions 112

Financial Aid 113

Student Accounts 113

Academic Records 114

Distance Education 114

Placement 115

Housing 115

Bookstore 115

Setup 115

Get More Help 116

Select City ZIP Code 117

Incoming Phone Call Activity 118

To record an incoming phone call activity for a selected student or employer: 118

Outgoing Phone Call Activity 119

To assign an outgoing call or record an outgoing phone call activity for a selected student or employer: 119
Letter Activity 120
To match a letter activity with a selected student: 120
Daily Contact Manager Activities 120
Daily Contact Manager Letters 121
Mail Merge Codes 122
Available Merge Field Codes for Letter Activities 122
Available Merge Field Codes for E-mail Activities 125
Merge Field Codes for Job Notification E-mail Activities 132
Meeting Activity 134
To add or edit a meeting activity with a selected student or employer: 134
Message Activity 135
To add or edit a message activity: 135
Daily Contact Manager Messages Tab 135
Other Task Activity 136
To record an "Other Task" activity for a student or employer: 136
Daily Contact Manager Activities 136
Groups for a Student 137
To view or edit the group membership for a student: 137
Student Groups Menu 139
Create Labels 140
Part 1 - Assign an "Activity" Name to Your Label 140
Part 2 - Define the Labels with Merge Codes and Postal Bar Codes 141
Part 3 - Test Your New Mail Merge Labels 142
Automatic Activity Scheduler 142
Multiple Disbursements 143
Configuring Multiple Disbursement Definitions 144
Enabling Multiple Disbursements 146
Auto Recalculate Multiple Disbursements 147
Enabling Auto Recalculate Multiple Disbursements 148
Multiple Disbursement System Settings 149
Configuring Multiple Disbursements System Settings 150
Configuring Additional Multiple Disbursement Criteria 151
Multiple Disbursements Forms 152
Disbursement Approval Criteria Code Setup Form 153
System Configuration of Multiple Disbursements Form 155

Multiple Disbursement Configuration in Campus Information ... 158
Multiple Disbursements Editor Form ... 160
System Setup Overview ... 162
Localization for International Schools ... 163
System-wide features: ... 163
Setup Considerations ... 163
Mail Merge ... 164
Currency Designator for Reports ... 164
Customizing the Date Format ... 165
Error Handling ... 166
System Messages ... 168
System Codes ... 169
Academic Calendar Year Codes (Also see Payment Methodologies) ... 169
Campus Groups ... 169
Campus License Units (CLU) ... 169
Contact Manager Activity (Event) Types ... 169
Direct Loan Grade Level Codes ... 169
Direct Loan Origination Status ... 170
Disbursement Option ... 170
Disbursement Status ... 170
FAFSA Status Codes ... 170
FAGL Fund Types ... 170
FAGL Fund Authorization Types (Distribute Authorization) ... 170
Financial Aid Disbursement Status Codes ... 171
Financial Aid Packaging Status Codes ... 171
Financial Control Codes ... 171
Institution Type Codes ... 171
Instructor Pay Codes ... 171
Module Identifier Codes ... 171
Payment Methodologies (Also see Academic Calendar Year Codes) ... 172
Payment Type Codes ... 172
PLUS Credit Decision ... 172
Promissory Note Print Options ... 172
Promissory Note Status ... 173
Required Course Types ... 173
Required Transaction Codes ... 173

Retake Indicator ... 173
Staff Groups ... 173
Status Categories ... 174
Stipend Schedule Status Codes ... 174
Student Status Codes ... 174
Student Status Codes in a Class Section ... 174
System-Required Student Master Fields ... 174
Transaction Type (Code) ... 174
Set Background Color ... 176
To set the background color of the work area: ... 176
Shortcuts and Access Keys ... 178
Windows Key Shortcuts ... 179
Accessibility Keys ... 179
Mouse Vs. Keyboard ... 179
Windows 2000: ... 180
Windows XP: ... 180
Use your pointing device (mouse) to select a folder: ... 180
To use your keyboard instead of your mouse: ... 181
Shortcut Menus ... 181
Sequence of System Setup Procedures ... 182
What is Replication? ... 218
Benefits of Replication ... 218
When to Use Replication ... 218
Replication Model ... 219
Publisher ... 219
Distributor ... 219
Subscribers ... 219
Publication ... 219
Article ... 220
Subscription ... 220
Types of Replication ... 220
Snapshot Replication ... 220
Transactional Replication ... 220
Merge Replication ... 220
Replication Data Considerations ... 220
Replication ... 222

Planning Replication ... 223
Servers ... 223
Publication Articles ... 223
Transactional Replication Intervals ... 223
Configuring Replication ... 224
Additional Procedures: ... 228
File Menu ... **231**
Add New Lead (Ctrl+L) ... 232
To add a new lead: ... 232
New Lead (Full) (Ctrl+N) ... 234
To enter a new Student Master record: ... 234
Original Rep ID ... 235
Close (Ctrl+F4) ... 236
Refresh (F5) ... 237
Delete ... 238
Print ... 239
To print reports from List forms: ... 239
To print reports from the Reports menu: ... 239
Print Setup ... 240
Report Printing Orientation ... 240
Shared Local Printers ... 240
To set up printers: ... 240
Recent Students ... 242
Recent Employers ... 243
Logoff ... 244
Close All Forms ... 245
Exit ... 246
Student Master ... 247
To view a Student Master form: ... 247
Duplicate Student Records ... 249
Student ID Setup ... 250
Student ID Alternatives ... 250
Alternative 1 - Automatic Student ID Generation ... 250
Alternative 2 - Required Manual Entry of the Student ID ... 251
Alternative 3 - Optional Manual Entry of the Student ID ... 251
Alternative 4 - No Use of the Student ID Field ... 252

Student Master Fields 253
Field Descriptions for the Student Master Form 253
Student Status 260
What is Student Status? 260
Change a Student Status 260
To change the status of a student: 260
More on Student Status 261
Adding a Quick Lead 262
To quickly add a lead: 262
Adding a New Student 264
Duplicate Student Records 264
To add a new student master record: 264
Student Master - Long Form 265
Student Master - Short Form 266
Editing a Student Master Form 267
To edit a Student Master form: 267
Address Change 269
Save Old Address 270
To save the previous address information: 270
Print Address Labels 271
To print a label: 271
Comments 272
To add or view comments related to a selected student: 272
E-Mail 273
To send an email to a student: 273
Student Picture 274
To work with student pictures: 274
Deleting a Lead-Student 275
To delete a lead or student record set: 275
Find Menu 276
Student Record Search 277
Search Tab 277
Advanced Tab 277
Groups Tab 277
Student Record Search 278
Search Tab 278

Advanced Tab ... 278
Groups Tab ... 278
Finding a Student Master Record From the Search Tab ... 279
To find student records using the Search tab: ... 279
Customizing the Search Results Grid ... 279
To customize the search results grid: ... 280
Finding Student Records From the Advanced Tab of the Search Form ... 281
To find student records using the Advanced tab: ... 281
Advanced Search Fields ... 283
Saving and Loading Student Groups ... 284
To save a group of students: ... 284
Loading a Group ... 284
To load a group of students: ... 284
Updating Student Groups ... 285
Adding Students or Replacing All Students in a Group ... 285
To add students to a group or to replace all students in a group: ... 285
Deleting Students from a Group ... 285
To delete students from a group: ... 285
Next Student ... 287
To use the Find Next Student feature: ... 287
View Menu ... **288**
View > Contact Manager ... 289
Student Master ... 290
To view a Student Master form: ... 290
Duplicate Student Records ... 292
Contact Manager Security Policy ... 293
Contact Manager Form ... 293
Contact History Form ... 293
Contact History Form ... 294
To view, add, edit, or close activities for a student: ... 294
Activity Form ... 297
To add or edit an activity: ... 297
Groups for a Student ... 301
To view or edit the group membership for a student: ... 301
Email Activity ... 303
To add an email activity for a student (or employer): ... 303

Document Tracking by Student ... 307
To add or edit the tracking data for a document: ... 307
To add or edit the tracking data for a document list: ... 310
Display Document ... 310
To view a stored document: ... 311
To scan a cover sheet ... 312
To audit a document: ... 312
Addresses in Contact Manager ... 313
To add or edit an additional student address: ... 313
Agency Affiliations ... 316
To view, add, or edit agency affiliations: ... 316
Student Picture ... 319
To work with student pictures: ... 319
Transcript Request ... 320
To add or edit a transcript request: ... 320
International ... 324
SEVIS Overview ... 326
Student and Exchange Visitor Information System (SEVIS) ... 326
Student Info ... 327
To record international student information: ... 327
F1/M1 Data ... 329
J1 Data ... 332
To record the international student's J1 data: ... 332
Immigration Data ... 335
To record the international student's immigration data: ... 335
Dependent Data ... 337
To record the international student's dependent data: ... 337
Transmission ... 339
Employment Authorization ... 340
To record the international student's employment authorization data: ... 340
Program ... 343
To record the international student's program data: ... 343
Program Tab for F1/M1 Student ... 343
Program Tab for J1 Student ... 344
Address ... 345
To record the international student's address data: ... 345

Comments ... 346
To record comments about the international student: ... 346
Contact Method ... 347
To set up the student's preferred contact method: ... 347
Advisors ... 349
To view a student's advisor list: ... 349
Standard Advisor Selection ... 350
Reassigning Advisors ... 350
To use the Advisor Assignment Wizard to re-assign students in batches and override automatic features to assign specific advisors: ... 351
FERPA Student Information ... 352
Displaying FERPA Directory Information and Academic Information ... 352
Adding/Editing FERPA Student Information ... 352
Directory Information Tab ... 352
Academic Information Tab ... 353
Person Information Subtab ... 353
Creating a New FERPA Address ... 354
Review/Amend/Remove Request subtab ... 355
Review Request ... 356
Amend/Remove Request ... 356
FERPA Audit Tab ... 356
View > Admissions ... 358
Student Master ... 359
To view a Student Master form: ... 359
Duplicate Student Records ... 361
Inquiry ... 362
Inquiry Record Data Elements and Business Processing ... 362
To view, add, or edit an inquiry: ... 362
Applicant ... 365
Applicant Record Data Elements and Business Processing ... 365
To manage applicant data: ... 365
Education ... 372
To edit the student's Education form: ... 372
Admissions Summary ... 379
To view the admissions summary: ... 379
Entrance Tests ... 380

To add or edit an entrance tests associated with a student's record: 380
School Fields 382
To view or edit school fields: 382
Audit 383
To view the admissions audit for a student: 383
Status History 384
To view or edit the status history for a student: 384
Deposit 388
To post a deposit: 388
Transfer Credits 394
To transfer credits for an incoming student: 394
View > Financial Aid 399
Student Master 400
To view a Student Master form: 400
Duplicate Student Records 402
Introduction to FA Packaging 403
Application Processing Updates 403
Selection of Latest Award Year when COD Grants and Direct Loans are Configured 403
NSLDS Fraud Loan Flag Reject 24 Added to Reject Edits 403
ISIR Reports for the Current Award Year Include SLEU and SULA Content 403
Verification Tracking Group V6 Now Available 404
Group V2 No Longer Available for FAFSA 404
SULA Flag Added to FA Packaging 404
Sequester Updates for Direct Loan Origination Fees 404
Sequester Updates for Teach Award Limits 405
COD Export Accommodates GEN-13-13 Changes 405
Sequestration Updates Affecting COD Processing/Award Amounts and Fees 406
Notes: 406
Important: 406
Loan Period Dates Passed to COD 407
For the latest content about FAFSA, ISIR and COD processing, access Regulatory Help. 407
Student Financial Aid Packaging 407
Fund Sources 407
Expected Family Contribution (EFC) 407
Free Application for Federal Student Financial Aid (FAFSA) 407
"Gift Aid" or "Self-Help Aid" 408

Other Federal Student Aid Programs ... 408
Financial Aid Processing in CampusNexus Student ... 408
Financial Aid Setup ... 408
Financial Aid Lists ... 408
Student-Specific Packaging Operations ... 409
Packaging ... 409
Daily Operations ... 409
Approve Disbursements to Pay ... 410
SSCR Process ... 410
Print Batches of ISIRs ... 410
Financial Aid Data Communications ... 410
Export Data ... 411
Import Data ... 411
Financial Aid - Related Student Accounts Functions ... 411
Financial Aid Reports ... 411
Additional Information ... 412
Packaging ... 413
Payment Periods and Academic Year Packaging ... 413
Crossover Packaging ... 413
Financial Aid General Ledger and Packaging ... 414
Truth in Lending ... 414
Term Lists ... 414
Number of Disbursements ... 414
To organize the financial aid package for a given academic year: ... 415
Need Analysis Packaging ... 427
Packaging Configuration: ... 428
Campus-Based Aid: ... 428
Categorizing the Fund Sources ... 428
Dependent Student without a FAFSA or ISIR on file ... 429
NSLDS ... 430
NSLDS Loans / Overlapping Loan Periods tab ... 431
NSLDS Loan Limits tab ... 432
Deleting Pell ... 433
Half License Units ... 433
Packaging Forms ... 435
Title IV Payment Periods ... 436

Establishing Title IV Payment Periods ... 436
Department of Education Guidelines ... 436
Updating Academic Year, Payment Period, and Disbursement Date ... 436
Title IV Payment Period Adjustment ... 437
Configuring and Using this Feature ... 438
Packaging for Overlapping Loans ... 439
Overlapping Loan Example ... 439
Related Topics: ... 441
Notification of Receipt ... 442
Loan Borrower Variables ... 442
Setup > Financial Aid > Packaging ... 443
Lists > Financial Aid > Fund Source ... 443
View > Student Accounts > Ledger Cards ... 443
Daily > Student Accounts > Post FA Disbursements ... 444
Daily > Student Accounts > Post Payments ... 444
New Source of Aid ... 445
Add a Fund Source ... 445
To add a new source of financial aid to a student's FA list: ... 445
Other Financial Aid Loan Form ... 448
Actual Disbursements ... 448
Refunds and Stipends ... 449
Validations When Saving ... 449
To work with the Financial Aid Loan form: ... 449
CommonLine Application Status ... 452
Scheduled Disbursements Tab ... 453
Received Refund/Stipend Tab ... 457
Borrower Information ... 458
Promissory Note and Other Information Tab ... 460
Comments Tab ... 462
FA Student Cash Payment/Other Form ... 463
To work with the F/A Student Cash Payment/Other form: ... 463
Scheduled Payments Tab ... 469
Formula for Reamortization of Cash Payment Plans ... 470
Payments Received Tab ... 472
Refunds Tab ... 473
Auto Draft Tab ... 474

Comments Tab ... 474
Other Grant/Scholarship Form ... 475
To work with the Financial Aid Grant/Scholarship form: ... 475
COD Grants ... 479
To manage COD grants: ... 479
ACG Grant ... 479
SMART Grant ... 480
TEACH Grant ... 481
Scheduled Disbursements Tab ... 485
Rcvd & Refunds/Stipends Tab ... 488
Special Disb. Info Tab ... 490
Comments Tab ... 490
TEACH Grants - ATS Tab ... 490
Pell Grant Form ... 492
Pell Formula Calculations ... 492
Manually Entering the Pell Amount ... 492
Validations ... 493
To work with the Pell Grant form: ... 493
Scheduled Disbursements Tab ... 501
Pell Grant Eligibility Recalculation by Clock Hours ... 503
Rcvd & Refunds/Stipends Tab ... 504
Special Disb. Info Tab ... 506
Comments Tab ... 506
Packaging for Work Study and FWS Payments ... 508
Integrated Accounting ... 508
Integration with CampusNexus Finance, HR & Payroll ... 508
Amount Disbursed (Past) Field in CampusNexus Finance, HR & Payroll ... 509
Integration with CampusVue Finance, HR & Payroll ... 509
To package a student for work study aid or record a work study payment: ... 509
To record a work study payment that exceeds the Cost of Attendance: ... 512
Scholarship Processing ... 513
To set up a scholarship: ... 513
Direct Loan Form ... 515
To work with the Direct Loan form: ... 515
ISIR Requirements ... 522
Validations for Direct Loans ... 522

Calculation of Net Disbursement Amounts and Interest Rebate Amounts 523
Direct Loan Disbursements 524
To work with Direct Loan Disbursements: 524
Received Refund/Stipend 528
To work with Direct Loan Received Refunds/Stipends: 528
Borrower/Student Information 531
To work with the Direct Loan Borrower/Student Info: 531
Prom Note Information 536
To work with the Direct Loan Prom Note Information: 537
Print Prom Note 540
To print a promissory note: 540
Print Disclosure Statement 540
Origination Changes 542
Editing COD Originations 542
Origination Changes Created by Academic Related Activities 547
Loan Information 548
Informed Borrower Tab 548
Subsidized Usage Tab 549
Academic Year Form 551
Title IV Eligibility 552
Designing a Financial Aid Package: 552
Attribute warning message 557
Payment Periods 569
Reassign 571
Recalculate 571
Payment Periods for Non-Term Institutions 572
To set Field Level Security for the form: 573
Loan Periods 574
Prompting for Origination Changes 578
Loan Payment Period 579
Credits in Loan Period 580
Attribute warning message 580
Weeks/Non Enroll 581
Title IV Eligibility 581
Locking/Unlocking the Payment Periods 582
Security 583

Overlapping Loan Periods ... 584
Awards ... 586
SULA Flag on Awards Form ... 586
Student Centric Awards View ... 587
To work with the Student Centric Awards View form: ... 587
Financial Aid Summary ... 589
Academic Year Details ... 591
Pell Grant ... 591
Other Grants ... 591
Student Loan (not a Direct loan) ... 592
Direct Loan ... 592
Cash/Other Payments ... 592
Print the Summary ... 592
School Fields - Financial Aid ... 593
To view or edit school fields: ... 593
Financial Aid Audit ... 594
To view the Financial Aid Audit: ... 594
Financial Aid Estimates ... 596
To prepare a financial aid estimate: ... 596
Financial Aid Document Tracking ... 601
To edit tracking data for listed documents: ... 601
Add Document List ... 601
To add or edit the tracking data for a Financial Aid document list: ... 601
Add Document ... 602
Display Document ... 602
To view a stored document: ... 602
Scan Cover Sheet ... 603
Document Audit ... 603
To audit a document: ... 603
Document Detail Tab ... 604
ISIR Details Tab ... 604
State Report Evaluation ... 605
View > Student Accounts ... 608
Student Master ... 609
To view a Student Master form: ... 609
Duplicate Student Records ... 611

Ledger Cards 612
Integration with CampusNexus Finance, HR & Payroll 612
Ledger Cards in CampusNexus Finance, HR & Payroll 612
To view or print the ledger card: 612
Ledger Cards Form - Field Level Security 620
Adjust Transaction 621
Integration with CampusNexus Finance, HR & Payroll 621
To adjust a transaction: 622
Void Refund/Stipend Check 623
Void This Transaction 624
Modify Transaction 625
Transaction Adjustment 626
Adjust Payment 626
Post Individual Refunds 629
Updating the Direct Loan Disbursement File 629
ACH Processing 629
To post a manual refund: 630
Audit Features 633
Apply Credits - Student Charges and Payments 634
To apply credits: 635
Payment Schedule 638
To set up a payment schedule: 638
Payment Schedule Date Calculations: 640
Payment Periods 641
Payment Adjustments 643
Apply Payments to Charges 644
To apply payments to charges: 644
Stipend Schedule 646
Fund Source Security 646
Scheduling and Disbursement 646
To view, edit, or add a stipend schedule: 646
Scheduled Disbursements tab 648
Disbursements Made tab 649
Revenue Ledger 652
To add an adjustment entry to the student's Revenue Ledger: 652
Unscheduled Payments 658

To schedule a payment that has not yet been scheduled for a student: 658
Refund Calculation 660
To process the refund for a selected student: 660
Manual Refund Policy 665
Refund Calculations 665
Refund Calculation Messages and Override Option 665
Refund Calculation Summary and Reports Selection - Drop Report 666
Audit Features 666
Return of Title IV Funds 668
Processing the Return of Title IV Funds 668
SEOG Matching Percentage 670
Return of Title IV Funds Calculation Worksheets 670
Previously Calculated Title IV Refunds 671
Refund of Title IV Calculation Wizard 671
Worksheet Step 1: Student Title IV Aid Information 672
Worksheet Step 2: Percentage of Title IV Aid Earned 675
Credit Hour Worksheet 675
Clock Hour Worksheet 676
Calculation 1 676
Calculation 2 676
Worksheet Step 3: Amount of Title IV Aid Earned by the Student 676
Worksheet Step 4: Total Title IV Aid to be Disbursed or Returned 676
Post-withdrawal disbursement (PWD) (Worksheet Box E) 677
Post-Withdrawal Disbursement Made From 677
Title IV Aid to be Returned (Worksheet Box F) 677
Worksheet Step 5: Amount of Unearned Title IV aid due from the school 677
Worksheet Step 6: Return of Funds by the SCHOOL 679
Worksheet Step 7: Initial Amount of Unearned Title IV Aid Due from the STUDENT 680
Worksheet Step 8: Return of Funds by the STUDENT 680
The 50% Rule 681
Print the Calculation 681
Save the Calculation 681
Standard Refund Calculation 681
Selection of Term or Academic Year 682
Refund Payable Breakdown 682
Update Return of Title IV Funds Calculation ID 682

Title IV Return of Funds Report ... 682
School Fields - Student Accounts ... 684
To view or edit school fields: ... 684
Student Account Summary ... 685
To view the Student Account Summary report: ... 685
Payment Information ... 687
Integration with CampusNexus Finance, HR & Payroll ... 687
To set up a student payment account: ... 687
To set up an agency payment account: ... 691
Transaction Detail ... 693
Detail Tab ... 693
Other Information Tab ... 695
Student Subsidiaries ... 699
To create a subsidiary: ... 699
To post payments or charges to a subsidiary: ... 700
Audit Features ... 702
Tuition Discounts ... 704
To post tuition discounts for a student: ... 704
Collections ... 706
To manage Student Collections: ... 707
To set Field Level Security for the form: ... 708
Audit Features ... 708
Student Accounts Audit ... 710
To view the Student Accounts Audit folder: ... 710
Student Registration Bill ... 711
To run the Student Registration Bill report: ... 711
Print Summary Registration Bill ... 713
Print Detail Registration Bill ... 714
Connected Enrollment Reports ... 715
Detail Connected Enrollment Registration Bill ... 715
Summary Connected Enrollment Registration Bill ... 717
View > Academic Records ... 719
Student Master ... 720
To view a Student Master form: ... 720
Duplicate Student Records ... 722
Enrollment ... 723

To work with enrollment records: 723
To add an enrollment: 725
Connected Enrollments 725
To set up connected enrollments: 726
To perform a Program Change: 726
Term Groups and Enrollment Status 726
To edit an enrollment: 726
To delete an enrollment: 727
To view Status History or Degrees 727
Adding Non-Term Breaks 727
To specify a non-term break: 728
Application Tab 729
Enrollment Changes 730
Step 1 of the Enrollment Change Wizard 730
Step 2 of the Enrollment Change Wizard 731
Step 3 of the Enrollment Change Wizard 732
Step 4 of the Enrollment Change Wizard 733
Step 5 of the Enrollment Change Wizard 733
Step 6 of the Enrollment Change Wizard 734
Setup > Campus Locations > Financial Aid 735
Transfer Enrollment 736
To transfer data from one enrollment to another: 736
Transfer of Subsidiary Transactions Upon an Enrollment Transfer 744
Reentry Wizard 746
To perform the reentry process: 746
Reentering into a New Program 750
Date / Status 756
To view or edit the date and status information for an enrollment: 756
Enrollment Information 761
To view or edit the enrollment information: 761
Connected Enrollments 763
Progress 764
To view or edit the enrollment progress information: 764
Staff Group Field-Level Security for Progress fields 767
Total Attended Hours for Clock Hour Programs 769
Basis 769

Effects of Course Association/Unassociation ... 769
Term Summary ... 770
To view the term summary information: ... 770
Excluding Partial SAP Terms ... 774
To enable the validation of a partial SAP Term for a specific SAP Code: ... 774
Configuring Partial Term SAP for a Student ... 775
To configure one or more SAP Partial Terms for a student: ... 775
Enrollment Summary ... 778
To view the Enrollment Summary: ... 778
Schedule ... 780
To work with the Student Schedule form: ... 780
Adding a Course ... 788
To add a course to a student's schedule: ... 788
Adding Course Extensions ... 792
To add an extension to a student's scheduled course (class section): ... 792
To set up an automatic charge for a course extension: ... 793
Associate or Unassociate Courses ... 795
To associate completed or dropped courses with other enrollments: ... 795
To unassociate courses from an enrollment: ... 796
Deleting a Course ... 797
To delete a course from a student's schedule: ... 797
Dropping a Class Section ... 799
To drop a class section from a student's schedule: ... 799
Reinstating a student's course ... 804
Editing a Course ... 805
To edit a course on a student's schedule: ... 805
Reassigning a Course ... 808
To reassign courses from one enrollment to another: ... 808
Registering a Student ... 809
Validations for Registrations ... 809
Navigation Paths for Registration ... 811
To register a student in a class section from the Student Schedule form: ... 811
Registering for Multiple Classes ... 816
To register a student for multiple class sections: ... 816
Managing Registration Groups ... 820
To work with registration groups: ... 820

Reinstating a Course ... 822
To reinstate a student into a course: ... 822
Transferring a Course Section ... 823
To transfer a student to another course section: ... 823
Unregistering a Student ... 828
Course Section Add/Drop Validation ... 828
To unregister a student from a class section: ... 828
Attendance ... 832
To view or post attendance for a student in a selected class section: ... 832
Lessons ... 837
To view or update lesson data for a student: ... 837
Final Grades ... 839
To enter or edit a final grade for a student's class section: ... 839
Degree Progress Audit Form ... 844
Program Details ... 844
Student Academic Progress ... 845
Course Levels ... 845
Course Categories/Areas of Study ... 845
Course Category Course Lists ... 846
Course Category with Electives ... 846
Requirement Rules ... 847
Taken Courses Not Applied ... 847
Hypothetical Degree Progress Audit ... 848
Details for Additional GPAs ... 848
Course Order in the DPA ... 848
Degree Progress Audit Logic ... 850
Viewing a Degree Progress Audit ... 851
To view a Degree Progress Audit: ... 851
Working with the Degree Progress Audit (Edit Mode) ... 852
To work with the Degree Progress Audit: ... 852
Performing a Hypothetical Degree Progress Audit ... 860
To work with the Hypothetical Degree Progress Audit: ... 860
Grade Audit ... 861
To view audit entries for academic records: ... 861
Fees ... 867
Edit Enrollment Fees ... 867

To enter or edit a fee on the enrollment schedule for a student: 867
Degrees, Honors, and Comments 869
To add or edit degrees, honors, and comments: 869
School Fields - Academic Records 871
To view or edit school fields: 871
Transfer Credits 872
To transfer credits for an incoming student: 872
Placement Info 877
To view a student's placements: 877
Term Confirmation Overview 878
Term Confirmation Setup 879
To enable the Term Confirmation feature: 879
Term Confirmation Staff Access 881
To assign Term Confirmation permissions: 881
Student Term Confirmation Status 882
To set the student Term Confirmation status: 882
To review the Term Confirmation settings for a student: 882
Registration Locks 884
To manage Registration Locks: 884
Additional GPAs 887
To view additional GPAs: 887
Payment Period Summary 890
To view the payment period summary: 890
Payment Period Locking and the Completed Flag 890
About the Completed Flag 890
Locking Payment Periods 891
Locks applied to the start date of an Academic Year/Loan Period and Payment Period 1 891
Locks applied to the end date of an Academic Year/Loan Period and Payment Period 2 891
Auto Locks 891
Locking Academic Year End vs. Completing the Academic Year 891
View > Career Services 892
Student Master 893
To view a Student Master form: 893
Duplicate Student Records 895
School Fields - Placement 896
To view or edit school fields: 896

Student Placements ... 897
To work with student placements: ... 897
In School ... 899
To edit an In School placement record: ... 899
Exit Interview ... 901
To edit an exit interview record: ... 901
Placement & Intern/Extern History ... 903
To add/view activities: ... 903
To add a job placement record: ... 903
To view or edit a job placement: ... 905
Converting an Intern/Externship to a Job ... 906
Comment Tab ... 906
Verification Tab ... 906
Employer Details Tab ... 907
Salary Details Tab ... 907
Student Job Skills/Titles ... 909
To select a list of special skills and job titles that apply to the selected student: ... 909
To delete a skill or title from the list: ... 909
Placement Preferences ... 911
To designate preferences that apply to the selected student: ... 911
To delete a preference from the list: ... 911
Resume ... 913
To access a student's resume: ... 913
Placement Wizard ... 914
To place a student in an available job: ... 914
Add New Employers ... 914
Placement Status History ... 921
Certifications ... 924
To view or edit certifications for a student: ... 924
Placement Audit ... 925
To view the Placement Audit record: ... 925
Placement Record Fields Audit tab ... 925
Deleted Student Placement Records tab ... 925
Career Services Advisor Audit tab ... 926
View > Loan Management ... 927
Student Master ... 928

To view a Student Master form: 928
Duplicate Student Records 930
Loan Management 931
To work with the student's loan management data: 931
Loan Status History 935
School Fields - Loan Management 936
To view or edit school-defined fields: 936
View > Student Services 937
Student Master 938
To view a Student Master form: 938
Duplicate Student Records 940
Housing Information 941
To enter student housing information: 941
Switch Rooms 943
To switch rooms: 943
School Fields - Student Services 946
To enter information into the School Fields form: 946
Services 947
To manage Student Services: 947
Athletics 948
Disability Services 950
Veteran Information 953
Best Practices 955
Audit 956
View > Housing 957
Student Master 958
To view a Student Master form: 958
Duplicate Student Records 960
Housing Deposits 961
To post housing deposits: 961
View Housing Applications 967
Working with Housing Applications 967
To work with the housing applications for a student: 967
To view a student's housing application: 968
To add a housing application for the student: 968
To edit a housing application for the student: 969

To withdraw a housing application submitted by the student ... 969
Working with Housing Leases ... 969
To work with housing leases for a student: ... 969
To view room/roommate information for a lease: ... 970
To generate the charge schedule for a lease: ... 971
To view/edit charge schedule for a lease: ... 971
To bill outstanding charges for a lease: ... 972
To print the charge schedule: ... 973
To Print a lease: ... 973
To edit the housing lease for the student: ... 973
To attach documents to a lease: ... 974
To add a contact manager activity to a housing lease: ... 975
To change the room assigned to a student ... 976
To renew a housing lease: ... 976
Accept housing deposits without student filling housing in application ... 977
Services ... 978
To add a service for a student and place the specified charge on the student's ledger: ... 978
School Fields - Housing ... 980
To view or edit school fields: ... 980
Audit ... 982
To view the Housing Audit: ... 982
Student Groups ... 983
Creating a Student Group from a Report ... 983
Adding and Deleting Group Members ... 984
Display Inactive Groups ... 984
Display other Groups ... 984
Exclude manually added/deleted students upon refresh ... 984
Group Types ... 984
Dynamic Group ... 984
Static Group ... 985
Frozen Group ... 985
Manual Group ... 985
Group Type Change Warning ... 985
Add a Manual Group ... 985
To add a manual group: ... 985
Delete a Group ... 986

Only the owner of the group can delete it from the list of groups. 986
To delete a group: 986
View SQL 986
View Students 988
To see a list of the members in a student group: 988
Add a Student to a Group 990
To add a new student to a manually maintained group: 990
Remove a Student from a Group 991
To remove a student from a manually maintained group: 991
Add a Group Activity 992
To add an activity to a group: 992
Employer Groups 994
Group Types 995
Dynamic Group 995
Static Group 995
Frozen Group 996
Manual Group 996
Group Type Change Warning 996
View Employers 996
Search Groups 996
Clear Search Results 996
Schedule Activity 997
Adding a Manual Group 998
To add a manual group: 998
Deleting a Group 998
To delete a group: 998
View Employers 999
To view a list of the members in an employer group: 999
Adding an Employer to an Employer Group 999
Deleting an Employer from an Employer Group 999
Employer Report Preview 1001
Report Viewer Controls 1001
Mail Merge 1002
Excel 1002
Navigation Tools 1002
Changing System Administrator Session Parameters 1003

Menu Bar 1004
Menus on the CampusNexus Student Menu Bar 1004
Detaching Submenus from the Daily Menu 1005
CampusVue Finance, HR & Payroll Launch 1005
Student Bar 1007
Adding a Custom Group to the Student Bar 1007
Autohide Student Bar 1008
Toolbar 1009
Status Bar 1012
Right Side of the Status Bar 1012
Left Side of the Status Bar 1012
Show or Hide the Status Bar 1012
User Toolbar 1013
User Toolbar Customization 1014
Display Options 1014
Data Elements 1014
Assigning Permissions to Customize the User Toolbar 1015
To allow a staff member to configure the customization of the toolbar: 1015
Configuring Forms and Elements to View on the User Toolbar 1016
To configure the forms and data elements you want to view on the User Toolbar: 1016
Viewing the Customized User Toolbar 1018
To view the customized User Toolbar: 1018
Viewing the Packaging Status on the User Toolbar 1019
To configure the Packaging Status to view on the User Toolbar: 1019
Enabling the Display of Total Attended Hours on the User Toolbar 1020
Lists Menu 1021
Maintaining Lists 1022
To add a list item: 1022
To edit a list item: 1022
To delete a list item: 1022
To disable or enable a list item: 1023
To print a report of list items: 1023
Lists > Contact Manager 1024
Setup - Contact Manager Lists [Academic Record Information] 1025
To add or edit a list of academic record information codes: 1025
To print a list of academic record information codes: 1026

Setup - Contact Manager Lists [Activities] 1027
To add or edit an activity code: 1027
Examples of Other Activity Types 1032
Meeting 1033
Incident 1033
SMS-Text Message 1034
Email 1036
Student Email 1036
Staff to Employer Email 1037
Web Alert 1038
To assign a web alert as an activity: 1039
Auto Disb. Cancellation/Disb. to Re-expect Alert 1039
Creating HTML Email 1041
HTML Editor 1041
Setup Questions-Script 1043
To set up a script and/or questions for an activity: 1043
Close Activity 1046
Setup - Contact Manager Lists [Activity Categories] 1047
To add or edit a list of activity category codes: 1047
Setup - Contact Manager Lists [Activity Results] 1049
To add or edit a list of activity results codes: 1049
Setup - Contact Manager Lists [Activity Status] 1051
To add or edit a list of a activity status codes: 1051
Setup - Contact Manager Lists [Address Types] 1053
To add or edit a list of address type codes: 1053
Setup - Contact Manager Lists [Document Status] 1055
To add or edit a list of document status codes: 1055
Setup - Contact Manager Lists [Documents] 1057
To add or edit a list of document codes: 1057
Setup - Contact Manager Lists [Document Lists] 1062
To add or edit a list of document list codes: 1062
Setup - Contact Manager Lists [Incident Type] 1065
To add or edit a list of incident type codes: 1065
Setup - Contact Manager Lists [SMS Service Providers] 1067
To add or edit a list of SMS service provider codes: 1067
Setup - Contact Manager Lists [Visas] 1069

To add or edit a Visa code: 1069
Integration of Contact Manager Activities 1071
Integrating Activities with a CRM System 1072
To verify that the prerequisite is met: 1072
To integrate selected Contact Manager activities with a CRM system: 1072
To remove the integration of Contact Manager activities with a CRM system: 1074
Producing a Report on Integrated Activities 1076
To verify that the prerequisite is met: 1076
To produce a report on Contact Manager activities: 1076
Lists > Admissions 1079
Setup - Admissions Lists [Agency Type] 1080
To add or edit a list of agency type codes: 1080
Setup - Admissions Lists [Applicant Type] 1082
To add or edit a list of applicant type codes: 1082
Setup - Admissions Lists [Application] 1083
To add or edit a list of application codes: 1083
To add questions and responses to the application: 1084
To preview or print an application: 1086
To print a list of applications: 1087
Setup - Admissions Lists [Citizenship] 1088
To add or edit a list of citizenship codes: 1088
Setup - Admissions Lists [Colleges] 1090
To add or edit a list of college codes: 1090
Setup - Admissions Lists [Contact Type] 1094
To add or edit a list of contact type codes: 1094
Setup - Admissions Lists [Counties] 1096
To add or edit a list of county codes: 1096
Setup - Admissions Lists [Countries] 1098
To add or edit a list of country codes: 1098
Setup - Admissions Lists [Education Level] 1100
To add or edit a list of education level codes: 1100
Setup - Admissions Lists [Ethnic Codes] 1102
To add or edit a list of ethnic codes: 1102
Setup - Admissions Lists [Exam Location] 1104
To add or edit a list of exam location codes: 1104
Setup - Admissions Lists [Extra-Curricular] 1106

To add or edit a list of extra-curricular codes: 1106
Setup - Admissions Lists [Gender] 1108
To add or edit a list of gender codes: 1108
Setup - Admissions Lists [Grade Level] 1109
To add or edit a list of state codes: 1109
Setup - Admissions Lists [Lead Categories] 1111
To add or edit a list of lead category codes: 1111
Setup - Admissions Lists [Lead Sources] 1114
To add or edit a list of lead source codes: 1114
Setup - Admissions Lists [Lead Types] 1117
To add or edit a list of lead type codes: 1117
Setup - Admissions Lists [Lead Vendors] 1119
To add or edit a list of lead vendor codes: 1119
To add or edit sub vendors: 1120
Setup - Admissions Lists [Marital Status] 1122
To add or edit a list of marital status codes: 1122
Setup - Admissions Lists [Nationality] 1124
To add or edit a list of nationality codes: 1124
Setup - Admissions Lists [Rep Type] 1126
To add or edit a list of admissions rep type codes: 1126
Setup - Admissions Lists [States] 1128
To add or edit a list of state codes: 1128
Setup - Admissions Lists [Suffix] 1130
To add or edit a list of state codes: 1130
Setup - Admissions Lists [Tests] 1131
To add or edit a list of test codes: 1131
To add, edit, or delete test details within a hierarchy: 1133
To specify test dates: 1133
Setup - Admissions Lists [Titles] 1134
To add or edit a list of title codes: 1134
Setup - Admissions Lists [Transfer Status] 1136
To add or edit a list of transfer status codes: 1136
Setup - Admissions Lists [Transfer Type] 1138
To add or edit a list of transfer type codes: 1138
To print a list of transfer types: 1139
Setup - Admissions Lists [ZIP Code Distance Zone] 1140

To add or edit a list of ZIP code distance zone codes: 1140
Lists > Financial Aid 1142
Financial Aid Lists [Academic Years] 1143
To add or edit a list of academic years codes: 1143
Financial Aid Lists [Budgets] 1146
To add or edit a list of budget codes: 1146
Financial Aid Lists [Disbursement Approval Criteria] 1149
To add or edit a list of disbursement approval criteria codes: 1149
Selecting Missing Documents 1158
Selecting Student's School Status 1160
Selecting Verification Status 1161
Impact of Clock to Credit Conversion Rate on Disbursement Approval 1161
Financial Aid Lists [Disbursement Schedules] 1163
To add or edit a list of disbursement schedule codes: 1164
To print a list of disbursement schedules: 1166
Financial Aid Lists [Excused Absence Policies] 1168
To add or edit a list of excused absence policy codes: 1168
Financial Aid Lists [FA G/L Funds] 1171
To add or edit the list of FA G/L fund codes: 1171
Financial Aid Lists [Fund Source] 1175
To add or edit a list of fund source codes: 1176
Fund Source GL Accounts/Refunds/Stipends 1190
Financial Aid Lists [Lenders] 1193
To add or edit a list of lender codes: 1193
Financial Aid Lists [Packaging Methods] 1197
To add or edit a list of financial aid packaging method codes: 1197
Financial Aid Lists [Packaging Statuses] 1200
To add or edit a list of financial aid packaging status codes: 1200
Financial Aid Lists [Packaging Status Promotion] 1202
Auto Status Promotion 1202
To add or edit a list of packaging status promotion codes: 1202
Financial Aid Lists [Programs] 1209
To add or edit a list of FA program codes: 1209
Packaging for SAY with the Summer Term as Header or Trailer 1217
Correct Number of Disbursements 1217
Correct Award Amount 1219

Correct Pell Amount 1219
Correct Summer Enrollment Status 1219
Academic Year Creation Process including Summer Term as Header or trailer 1219
Academic Years 1219
Term Association 1220
To associate terms and program versions and build an academic year: 1221
Academic Years tab 1223
To add or edit a new Academic Year to a Program 1224
Program Costs Tab 1224
Pell COA Tab 1225
Non-Term Payment Period tab 1225
Example: Full Formula Conversion of Clock Hours to Semester Hours 1231
Scenario 1231
Lists > Student Accounts 1232
Setup - Student Account Lists [Account Statuses] 1233
To add or edit a list of account statuses codes: 1233
Setup - Student Account Lists [Bank Codes] 1235
To add or edit a list of bank codes: 1235
CampusVue Finance, HR & Payroll 1240
Setting up Banks and Bank Accounts 1240
CampusNexus Finance, HR & Payroll 1245
To view bank information created in CampusNexus Finance, HR & Payroll and to edit CampusNexus Student bank account specific fields: 1245
Setup - Student Account Lists [Billing Methods] 1251
To add a billing method code: 1252
To edit a billing method code: 1253
Program / Enrollment 1253
Academic Year 1254
Term / Quarter 1255
Use Rate Schedule 1258
Rate Schedule Form 1258
Audit Rate Schedules 1261
Important Information 1261
Course 1262
Payment Period 1264
Automate Registration Charges and Adjustments 1266

Required Pending Charges Review ... 1266
Posting Types ... 1266
Aggregate Adjustments/Charges ... 1266
Post Transaction Details ... 1266
Set Offset Days from Term Start Date ... 1267
Transaction Date for Initial Charges ... 1267
Billing Method Report ... 1267
Dual Enrollment Automated Rate Schedule Billing Setup ... 1268
Setup - Student Account Lists [Cash Drawers] ... 1271
To add or edit a list of cash drawers codes: ... 1271
Setup - Student Account Lists [Cash Payment Description] ... 1274
To add or edit a list of cash payment descriptions codes: ... 1274
Setup - Student Account Lists [Course Refund Policies] ... 1276
To add or edit a list of course refund policies codes: ... 1276
Setup - Student Account Lists [Credit Card Types] ... 1283
To add or edit a list of credit card types codes: ... 1283
Setup - Student Account Lists [Drawdown/Return Sources] ... 1285
To add or edit a list of drawdown/return sources codes: ... 1285
Setup - Student Account Lists [Earnings Methods] ... 1287
Revenue Recognition Options ... 1287
To add or edit a list of earnings methods codes: ... 1287
Revenue Basis (Earning Unit) ... 1290
Late Charges Revenue Recognition ... 1291
Half-Month Allocation Rule ... 1292
Setup - Student Account Lists [Programs] ... 1293
To add or edit a list of program fees and billing codes: ... 1293
To edit transaction codes: ... 1297
Program Versions with Billing Method Set to Academic Year ... 1299
First Month Percentage Earnings ... 1300
To configure first month percentage earning: ... 1300
Setup - Student Account Lists [Refund Policies] ... 1303
To add or edit list of refund policies codes: ... 1303
Setup - Student Account Lists [Subsidiaries] ... 1311
To add or edit a list of subsidiaries codes: ... 1311
Setup - Student Account Lists [Term Group] ... 1318
To add or edit a list of term group codes: ... 1318

Setup - Student Account Lists [Transaction Codes] 1320
To add or edit a transaction code: 1320
Auto Charge Transaction Codes 1323
Setup - Student Account Lists [Tuition Discount Policy] 1327
To add or edit a list of tuition discount policies codes: 1327
Lists > Academic Records 1331
Setup - Academic Records Lists [Areas of Study] 1332
To add or edit a list of areas of study codes: 1332
Associate CIP Code with Area of Study or Program 1337
To associate a CIP code with an area of study or program: 1337
Setup - Academic Records Lists [Buildings/Rooms] 1339
To add or edit a list of buildings/rooms codes: 1339
Setup - Academic Records Lists [Calendar] 1343
To add or edit a list of non-attendance days (calendar codes): 1343
To delete a non-attendance day: 1344
Add/Drop Dates of Existing Course Sections 1345
Setup - Academic Records Lists [Catalog] 1346
To add or edit a list of catalog codes: 1346
To copy a catalog: 1348
To print a catalog list: 1349
Setup - Academic Records Lists [Course Attributes] 1350
To add or edit a list of course attributes codes: 1350
Setup - Academic Records Lists [Course Categories] 1352
To add or edit a list of codes for Course Categories: 1352
Setup - Academic Records Lists [Course Groups] 1354
To add or edit a course group: 1354
Setup - Academic Records Lists [Course Levels] 1357
To add or edit a course level: 1357
Setup - Academic Records Lists [Course Reason] 1359
To add or edit reasons for course status changes: 1359
Setup - Academic Records Lists [Course Type] 1361
To add or edit a course type: 1361
Setup - Academic Records Lists [Courses] 1363
To add or edit a course: 1363
Courses > Attributes 1373
To assign attributes to a course: 1373

Courses > Books 1374
To add or edit a book list: 1374
To add or edit a book list item: 1375
To copy a book list: 1376
To delete a book list 1377
Book List Updates of Course Sections 1377
Courses > Fees 1379
To add or edit a course fee schedule: 1379
To add or edit the fees associated with a fee schedule: 1380
Courses > Corequisites 1382
To set up corequisites for a course: 1382
Courses > Equivalency 1385
Cross-referenced Courses 1385
To select equivalent or cross-referenced courses: 1385
Parent Course Setup 1387
To select one or more parent courses: 1387
Courses > Prerequisites 1388
To set up prerequisites for a course: 1388
Courses > Course Resources 1397
To select the resources for a course: 1397
Setup - Academic Records Lists [Degree] 1398
To add or edit a list of degree codes: 1398
Setup - Academic Records Lists [Delivery Methods] 1400
To add or edit a list of delivery method codes: 1400
Setup - Academic Records Lists [Enrollment Status] 1403
To disable or enable enrollment status codes: 1403
Setup - Academic Records Lists [GPA] 1404
GPA Calculation 1404
GPA Calculation for Parent and Child Terms 1404
To add school-defined GPA codes: 1404
To edit a GPA code: 1411
Setup - Academic Records Lists [Grade Level] 1413
To add or edit a list of grade level codes: 1413
Setup - Academic Records Lists [Grade Level Promotion Rules] 1415
Automatic Grade Level Promotion and Anticipated Grade Level Evaluation 1415
To add or edit a list of grade level promotion rules: 1415

Setup - Academic Records Lists [Grade Scale] 1418
To add or edit a list of grade scale codes: 1418
To add or edit letter grades in a grade scale: 1419
To copy a grade scale: 1422
Setup - Academic Records Lists [Honors] 1424
To add or edit a list of honors codes: 1424
Setup - Academic Records Lists [Instructor Attributes] 1426
To add or edit a list of instructor attributes codes: 1426
Setup - Academic Records Lists [Lesson Types] 1428
To add or edit a list of lesson types codes: 1428
Setup - Academic Records Lists [Period] 1430
To add or edit a list of period codes: 1430
Setup - Academic Records Lists [Programs] 1434
To add or edit a list of program codes: 1434
Programs > Program Versions 1438
Real Time Scheduling 1438
To add or edit a program version: 1439
Program Version > Course List 1446
To add or edit a course list for a program version: 1446
Program Version > Start Date 1451
To add or edit a start date for a program version: 1451
To delete a start date: 1453
Program Version > Distance Education 1454
To set the distance education variables: 1454
Program Version > Copy Version 1455
To copy program version: 1455
Program Version > Test | Enrollment 1456
To add or edit a test list for a program version: 1456
Program Version > Areas of Study 1458
To configure a program version to require an area of study: 1458
To associate an area of study with a program version: 1458
To enroll a student into a program version: 1459
To transfer a student from an undeclared program to a declared program: 1459
Program Version > Term Sequencing 1460
To configure expected credits per term for a program version: 1461
Term Sequences Not Associated With Courses or Parts of a Term 1462

Things you should know ... 1463
To create a term sequence that is not associated with a course: ... 1463
To create a term sequence from the program version setup: ... 1464
To replace generic term placeholders in the term sequence with actual terms: ... 1465
To view a student's term sequence: ... 1466
Program Version > Documents ... 1470
To add a document list to a program version: ... 1470
Program Version > Method Selection ... 1472
Method Selection for Student Accounts ... 1472
To set up a billing method for a program version: ... 1472
To set up an earning method for a program version: ... 1472
To associate billing/earning methods for a program version: ... 1473
Method Selection for Financial Aid ... 1474
To set up a budget for a program version: ... 1474
To associate budgets for a program version: ... 1475
Programs > Documents ... 1477
To add a document list to a program: ... 1477
Programs > Tests | Pre-Enrollment ... 1478
To add or edit an entrance test list for a program: ... 1478
Programs > Requirement Rules ... 1480
To assign requirement rules to a program: ... 1480
Setup - Academic Records Lists [Program Group] ... 1481
To add or edit a list of program group codes: ... 1481
Setup - Academic Records Lists [Reasons] ... 1483
To add or edit a list of status change reason codes: ... 1483
Setup - Academic Records Lists [Requirement Rules] ... 1485
To add a list of requirement rules codes: ... 1486
Satisfactory Academic Progress (SAP) ... 1490
SAP Calculation ... 1490
GPA Criteria and Letter Grades ... 1491
SAP Maximum Time to Complete ... 1492
Configurable Option for MTF ... 1492
Setup - Academic Records Lists [SAP] ... 1493
To add or edit a list of SAP codes: ... 1493
SAP Detail ... 1498
To add or edit SAP details in the SAP table: ... 1498

Setup - Academic Records Lists [SAP Reason] 1502
To add or edit a list of SAP reason codes: 1502
Setup - Academic Records Lists [SAP Status] 1506
To add or edit SAP status codes and associate student groups with SAP status codes: 1506
Setup - Academic Records Lists [Start Date] 1509
To add or edit a list of start date codes: 1509
Setup - Academic Records Lists [Shifts] 1512
To add or edit a list of shift codes: 1512
Setup - Academic Records Lists [Registration Groups] 1514
To add or edit a list of registration groups codes: 1514
Setup - Academic Records Lists [Resources] 1518
To add or edit a list of resources codes: 1518
Setup - Academic Records Lists [Term] 1520
To add or edit a list of term codes: 1520
To complete the General tab: 1521
To complete the Length/Relationships tab: 1523
To complete the Web Registration tab: 1524
To complete the LMS Data Exchange tab: 1525
Term Relationships 1526
To view term relationships: 1526
To define term relationships: 1526
Payment Recalculation Notification Configuration 1527
To configure the payment recalculation notification: 1528
Pre-Pull/Add-Drop Automation Configuration 1528
To configure Pre-Pull/Add-Drop Automation: 1528
Setup - Academic Records Lists [Term Group] 1530
To add or edit a list of term group codes: 1530
Lists > Career Services 1533
Setup - Career Services Lists [Career Fields] 1534
To add or edit a list of career field codes: 1534
Setup - Career Services Lists [Certifications] 1536
To add or edit a list of certification codes: 1536
Setup - Career Services Lists [Contact Type] 1538
To add or edit a list of contact type codes: 1538
Setup - Career Services Lists [Corporate] 1540
To add or edit a list of corporate codes: 1540

Setup - Career Services Lists [Employer Contact Attributes] ... 1542
To add or edit a list of employer contact attribute codes: ... 1542
Setup - Career Services Lists [How Placed] ... 1544
To add or edit a list of how placed codes: ... 1544
Setup - Career Services Lists [Industry] ... 1546
To add or edit a list of industry codes: ... 1546
Setup - Career Services Lists [Job Benefits] ... 1548
To add or edit a list of job benefit codes: ... 1548
Setup - Career Services Lists [Job Category] ... 1550
To add or edit a list of job category codes: ... 1550
Setup - Career Services Lists [Job Source] ... 1552
To add or edit a list of job source codes: ... 1552
Setup - Career Services Lists [Job Title] ... 1554
To add or edit a list of job title codes: ... 1554
Setup - Career Services Lists [Job Type] ... 1556
To add or edit a list of job type codes: ... 1556
Setup - Career Services Lists [Location] ... 1558
To add or edit a list of location codes: ... 1558
Duplicate Codes ... 1559
Setup - Career Services Lists [Reasons] ... 1561
To add or edit a list of reason codes: ... 1561
Setup - Career Services Lists [Salary Type] ... 1565
To add or edit a list of salary type codes: ... 1565
Setup - Career Services Lists [Skills] ... 1567
To add or edit a list of skill codes: ... 1567
Duplicate Codes ... 1569
Occupation Insight Skills ... 1570
Lists > Book Store ... 1571
To add or edit a list of book store inventory codes: ... 1571
Lists > Loan Management ... 1574
To add or edit the list of loan status codes: ... 1574
Lists > Student Services ... 1576
Setup - Student Services Lists [Athletic Status] ... 1577
To add or edit a list of athletic status codes: ... 1577
Setup - Student Services Lists [Disability Services Status] ... 1579
To add or edit a list of disability services status codes: ... 1579

Setup - Student Services Lists [Disability Type] 1581
To add or edit a list of disability type codes: 1581
Setup - Student Services Lists [Location] 1583
To add or edit a list of location codes: 1583
Setup - Student Services Lists [Recruitment Type] 1585
To add or edit a list of recruitment type codes: 1585
Setup - Student Services Lists [Room Type] 1587
To add or edit a list of room type codes: 1587
Setup - Student Services Lists [Services] 1589
To add or edit a list of student services codes: 1589
Adding Custom Fields for Student Services 1590
Setup - Student Services Lists [Service Billing Method] 1593
To add or edit a list of service billing method codes: 1593
Setup - Student Services Lists [Service Categories] 1596
To add or edit a list of service categories codes: 1596
Sports 1598
To add or edit a list of sports codes: 1598
Setup - Student Services Lists [Veterans Affairs Benefit] 1600
To add or edit a list of veterans affairs benefit codes: 1600
Setup - Student Services Lists [Veterans Affairs Certification Type] 1601
To add or edit a list of veterans affairs certification type codes: 1601
Setup - Student Services Lists [Veterans Affairs Code] 1602
To add or edit a list of veterans affairs codes: 1602
Lists > Housing 1603
Setup - Housing Lists [Application] 1604
To add or edit a list of housing application codes: 1604
To edit system defined questions: 1606
To add questions to the housing application: 1607
To preview or print a housing application: 1608
To copy a housing application: 1609
To print a list of housing applications: 1609
Setup - Housing Lists [Building] 1611
To add or edit a list of building codes: 1611
To associate suites with buildings: 1613
To add rooms to a suite 1614
To associate rooms with buildings: 1615

To delete a building: 1616
To disable or enable a building: 1616
To print a list of buildings: 1616
Setup - Housing Lists [Building Categories] 1618
To add or edit a list of building category codes: 1618
To print a list of building categories: 1619
Setup - Housing Lists [Housing Amenities] 1620
To add or edit a list of housing amenities codes: 1620
To print a list of housing amenities: 1621
Setup - Housing Lists [Housing Dates] 1622
To add or edit a list of housing dates codes: 1622
To print a list of housing dates: 1623
Setup - Housing Lists [Room Categories] 1625
To add or edit a list of room categories codes: 1625
To print a list of room categories: 1626
Setup - Housing Lists [Suite Categories] 1628
To add or edit a list of suite categories codes: 1628
To print a list of suite categories: 1629
Uploading Building Images 1630
To upload images of the building, suite, and room categories: 1630
Daily Menu 1632
Daily > Contact Manager 1633
Contact Manager Form 1634
To manage activities in the Contact Manager: 1634
Activity Calendar 1638
To use the activity calendar: 1638
Activity Form 1640
To add or edit an activity: 1640
Closing an Activity 1644
To close an activity: 1644
Messages Tab 1646
To add a message in Contact Manager: 1646
To reply to a message in Contact Manager: 1647
To mark a message as read in Contact Manager (Delete a Message): 1647
Students Tab 1649
To view a student: 1649

To add an activity ... 1650
To add a message: ... 1650
To customize your student list: ... 1650
Activity Scheduler Overview ... 1652
To add an automatically assigned activity: ... 1652
Activity Scheduling on the Basis of Document List ... 1653
Activity Scheduling on the Basis of Applicant Type ... 1655
Adding an Auto Activity ... 1656
To add a new automatically assigned activity to the Contact Manager module: ... 1656
Editing an Auto Activity ... 1660
To edit an automatically assigned activity in the Contact Manager module: ... 1660
Deleting an Auto Activity ... 1662
To delete an automatically assigned activity in the Contact Manager module: ... 1662
Scheduling Documents ... 1663
To add or edit document schedules: ... 1663
Document Sub-Page ... 1667
Document List Sub-Page ... 1667
Letters Overview ... 1669
Editing Letters ... 1670
To edit a letter: ... 1670
Using Ledger Merge Fields in Letter Activities ... 1674
Sample Template Containing Ledger Merge Fields ... 1675
Sample Printed Letter Containing Merged Ledger Data ... 1676
Printing Letters ... 1677
To clear, edit, or print Student form letters manually: ... 1677
Clear Letters ... 1677
Print Letters ... 1678
Create Labels ... 1680
Part 1 - Assign an "Activity" Name to Your Label ... 1680
Part 2 - Define the Labels with Merge Codes and Postal Bar Codes ... 1681
Part 3 - Test Your New Mail Merge Labels ... 1681
Automatic Activity Scheduler ... 1682
Processing Transcript Requests ... 1683
To process transcript requests: ... 1683
Searching for Reference Addresses ... 1685
To search for an address in the student address records: ... 1685

Printing Transcript Request Letters ... 1686
To print transcript request letters: ... 1686
Importing and Exporting SEVIS Data ... 1687
To Export SEVIS data: ... 1687
To Import SEVIS data: ... 1687
Reviewing PDSO SEVIS Data ... 1688
To review SEVIS data: ... 1688
Designating Default Campus Advisors ... 1689
To select default campus advisors for each department: ... 1689
Additional Advisors ... 1689
To add an advisor: ... 1689
To delete an advisor: ... 1690
Advisor Assignment ... 1691
Reassigning Activities ... 1691
To assign advisors: ... 1691
Looking Up DNC Numbers ... 1698
To look up a referral's phone number: ... 1698
Agency/Third Party ... 1700
To add or edit an Agency sponsor: ... 1700
Tests | Pre-Enrollment ... 1701
To select entrance tests for the agency: ... 1701
Documents ... 1702
Branches ... 1703
Viewing and Editing Incidents ... 1710
To view all reported incidents for a campus: ... 1710
Editing an Incident ... 1711
To edit an incident: ... 1711
Reporting an Incident ... 1712
To report a new incident: ... 1712
Assigning Documents ... 1715
To assign documents to student groups: ... 1715
Modifying Batch Activities ... 1718
To modify activities in a batch mode: ... 1718
Working with General Public Data ... 1725
Searching for a Record ... 1725
To Search for one or more individuals: ... 1725

Adding a General Public Record. 1726
To add a new member to the General Public database: 1726
Editing an Existing General Public Record 1727
To edit an existing record: 1727
Deleting a General Public Record 1727
To delete an existing record: 1727
Processing School Field Batch Updates 1728
To process school field batch updates: 1728
Daily > Admissions 1730
Processing Electronic Leads 1731
To process electronic leads: 1732
Electronic Leads Table 1734
Processing Online Applicants 1736
To view and resolve possible duplication in online applicants: 1736
Processing 1738
Rep 1738
Status 1738
Email Activity 1738
Lead Type 1739
Process 1739
Discard 1739
Enter Admissions Expenses 1740
Add Expense 1741
To add an expense in the Admissions module: 1741
Edit Expenses 1743
To edit an advertising expense in the Admissions module: 1743
Delete Expenses 1745
To delete an advertising expense in the Admissions module: 1745
Print Expenses 1746
To print advertising expenses for a selected lead source in the Admissions module: 1746
Document Tracking 1747
To edit tracking data for listed documents: 1747
Enrolling a Student 1750
To enroll a student who has completed the Admissions process: 1750
Reassign Leads 1757
To reassign leads to one or more new admissions representatives: 1757

High School Activities ... 1766
To work with the high school activities forms: ... 1766
High Schools ... 1770
To add or edit a high school: ... 1770
Contacts tab ... 1773
Transcript Office tab ... 1774
Courses tab ... 1775
Allocate Budgeted Starts ... 1777
To allocate budgeted starts: ... 1777
Transfer Credits ... 1779
To transfer credits for an incoming student: ... 1779
Manage Course Relationships ... 1784
To manage a course relationship: ... 1784
Batch Quick Lead Entry ... 1787
To work with the Batch Quick Lead Entry forms: ... 1787
Admission Rep Maintenance ... 1789
Import Test Scores ... 1791
To import tests: ... 1791
Match Test Scores ... 1793
To view imported test records: ... 1793
To Match Test Records: ... 1793
To Unmatch Test Records: ... 1794
Daily > Financial Aid ... 1795
Document Tracking ... 1796
To edit tracking data for listed documents: ... 1796
Approve Packaged Aid ... 1799
To work with the Approve Packaged Aid wizard: ... 1799
Approve Disbursements to Pay ... 1802
Miscellaneous Information About Approving Disbursements to Pay ... 1802
Course Retake Logic and Non-Term Payment Periods ... 1804
Course Retake Logic and Term Payment Periods ... 1805
To Approve Disbursements to Pay: ... 1805
New Batch Selection Criteria ... 1806
Batch in Progress ... 1807
Approve Disbursements ... 1807
Override FA Hold Groups ... 1814

Direct Loan Changes Batch Processing ... 1816
To make changes to Direct Loans: ... 1816
Review Pending Origination Changes ... 1818
Security ... 1818
Review Pending Origination Changes Form ... 1819
Packaging Financial Aid ... 1820
To set up batch packaging: ... 1820
Use Auto-Package ... 1821
Create FA Package ... 1825
Review Batch Package ... 1827
To review batch-packaged financial aid: ... 1827
Scholarship Processing ... 1828
To set up a scholarship: ... 1828
Post Work Study Disbursements ... 1830
To post work study disbursements: ... 1830
SSCR Process ... 1832
Process SSCR Roster file ... 1832
To process the SSCR roster file: ... 1832
Process Error Notification ... 1834
To process the SSCR Error Notifications: ... 1834
SSCR Process Overview ... 1836
The SSCR Cycle ... 1836
SSCR Status Mappings ... 1838
Print ISIRs-Batch ... 1841
Review/Print Multiple Batches ... 1842
Review Import Batches ... 1842
To review an imported batch file: ... 1842
Review Export Batches ... 1843
Batch Import ... 1843
To import a group of files: ... 1843
Export and Import File Types ... 1845
FAFSAs and ISIRs ... 1845
Direct Loans ... 1846
Pell Grants ... 1848
SSCR/Clearinghouse ... 1849
Third Party Servicers ... 1849

Import Attendance/Grades ... 1850
COD Export and Import ... 1850
Record File Layout for TQ.IMP File ... 1853
Export Application Data ... 1854
To export financial aid files for FAFSAs, ISIR Corrections, or Requests for Duplicate ISIRs: ... 1854
To export FAFSAs: ... 1855
To export ISIR corrections: ... 1856
Clearinghouse Export (Pre-2014) ... 1857
Export Direct Loan ... 1858
Loan Origination (Subsidized and Unsubsidized) ... 1858
To export subsidized and unsubsidized loan origination records: ... 1858
Loan Origination PLUS ... 1860
Loan Origination Changes ... 1860
Print Master Promissory Note Manifest ... 1860
Print PLUS Promissory Note Manifest ... 1860
Disbursements ... 1860
To export disbursements: ... 1860
Loan Detail ... 1862
Export Pell ... 1863
Origination Records ... 1863
Pell Enrollment Status of "Other" ... 1863
Batch Export Reports ... 1864
Export Origination Records ... 1864
To export origination records: ... 1864
Disbursement Records ... 1866
To export disbursements: ... 1866
Institutional Data Records ... 1867
Data Request - Multiple Reporting ... 1867
Data Request - Statement of Account ... 1868
Data Request - Year to Date ... 1868
Export to Servicer ... 1869
Global Exports ... 1870
To export data to Global: ... 1870
Weekly Extract ... 1870
Pre-Pull Extract ... 1872
Add-Drop Extract ... 1873

State Reporting ... 1875
HOPE Scholarship Configuration ... 1876
Configuring the HOPE Scholarship ... 1876
General Tab ... 1876
Campus Mapping ... 1876
HOPE Extract with Campus Code ... 1876
To configure Campus Mapping: ... 1877
Reporting Tab ... 1877
Fund Source Mapping ... 1877
Term Mapping ... 1878
Benchmark Mapping ... 1878
Tier Mapping ... 1879
HOPE Extract ... 1881
Processing correction record changes ... 1882
Report Configuration Financial Aid THECB Reports ... 1883
To configure THECB reports: ... 1883
Texas Grant Report ... 1884
To Configure the Texas Grant Report: ... 1884
Report Extract Financial Aid THECB Reports ... 1887
Financial Aid Database Report ... 1887
Texas Grant Report ... 1888
Report Configuration Financial Aid ICUT Reports ... 1889
Ethnicity of Financial Aid Report Configuration ... 1889
To Configure the "Ethnicity of Financial Aid Report": ... 1889
Other Financial Aid to TEG Recipients Report Configuration ... 1889
To Configure the "Other Financial Aid to TEG Recipients Report": ... 1889
Report Extract Financial Aid ICUT Reports ... 1891
Ethnicity of Financial Aid Report ... 1891
Other Financial Aid to TEG Recipients Report ... 1891
ICUT Reports ... 1892
To configure the ICUT reports: ... 1892
COD Export (2010-11 and prior award years) ... 1893
To export new files with combinations of Pell, ACG, SMART or TEACH Originations or Disbursements, or Direct Loan Options (Master Prom Note, Originations, Origination Changes, and Disbursement), and Identifier Changes: ... 1893
Grant Options ... 1894
Grant Types to Process Option ... 1896

Direct Loan Options 1901
Master Prom Note 1905
Import Application Data 1910
To import ISIR files for FA Award Years 2012-13: 1910
To import ISIR files for FA Award Years prior to 2005-06: 1911
To import ISIR files for FA Award Year 2005-06 and later: 1912
To import Signature Hold Files: 1913
COD Import (2010-11 and prior award years) 1915
To import COD files: 1915
Import Direct Loan 1918
To import Direct Loan files: 1918
School Account Statement 1918
YTD Rebuild 1919
Import Direct Loan YTD Rebuild 1920
Direct Loan YTD Form 1920
Import Pell 1921
Reconciliation File Acknowledgement (PGRCXXOP) 1922
Importing the YTD Pell File 1922
To import Pell grant files: 1922
Disbursements 1923
Create Test Imports 1924
This menu option is restricted to the CampusNexus Student System Administrator and the Financial Aid Administrator. 1924
To create the test import files: 1924
Import TEACH Grant 1926
To import TEACH grant files: 1926
HOPE Import 1928
To import the HOPE data: 1928
Servicer Integration Overview 1929
Example Process 1931
Hardware Requirements 1931
Servicer Setup 1932
Coming From Class 1932
Using a Servicer for the First Time 1932
Servicer Processing Setup Procedures 1932
EASSIST 1932

File Transmission Setup and Testing ... 1932
Daily Processing in CampusNexus Student ... 1933
Identifier Match ... 1933
CLFAFAID Import ... 1933
Import Matching Logic ... 1934
Notifications ... 1934
Exception Resolution ... 1934
Servicer Daily Transaction Audit ... 1936
Servicer Batch History Report ... 1936
Servicer Disbursement Batch Review ... 1936
Servicer Batch History Report ... 1937
Servicer Daily Transaction Audit ... 1939
To perform the Servicer Daily Transaction Audit: ... 1939
Servicer Daily Transaction Audit Report ... 1940
Servicer Disbursement Batch Review ... 1946
Exception Review ... 1947
Identifier Match ... 1947
Import Matching Logic ... 1948
Exception Review Forms ... 1948
To work with the Exception Review forms: ... 1948
Exception Record Types ... 1949
Exception Review Reports ... 1950
Exception Error Codes ... 1951
Paid Disbursement Validation ... 1962
To work with the Paid Disbursement Validation forms: ... 1962
FAGL Overview ... 1963
Financial Aid General Ledger Definition - Authorization Levels ... 1963
Setting Up the FAGL ... 1963
Setup > Campus Locations > Campuses > Financial Aid ... 1963
Lists > Financial Aid > Fund Source ... 1963
Daily Processing ... 1964
Commitment Levels ... 1964
Initialization of FAGL ... 1964
Miscellaneous FAGL Codes ... 1965
FAGL Fund Types ... 1965
FAGL Fund Authorization Types (Distribute Authorization) ... 1965

FAGL Authorization 1966
To work with FAGL Authorizations: 1966
FAGL Journal Entry 1969
To create FAGL journal entries: 1969
Clear Estimated Awards 1971
To clear all remaining estimated financial aid awards for a selected award year: 1971
Award Year Settings 1972
To configure Award Year settings for individual or all campuses: 1972
Setup > Financial Aid 1973
Setup > Campus Locations and Lists > Financial > Fund Source 1974
Print Queued Award Letters in Batch Mode 1976
To print a batch of Award Letters: 1976
FAGL Campus Allocations 1979
To set up campus allocations: 1979
Daily > Student Accounts 1980
Document Tracking 1981
To edit tracking data for listed documents: 1981
Post Deposits 1984
To post deposits from Admissions: 1984
Registration Billing 1986
To run the Registration Billing wizard: 1986
Process Pending Charges/Adjustments 1992
To see Pending charges for students by term: 1992
Post Batch Charges/Adjustments 1996
To post a batch of charges or adjustments: 1996
Generate Interest Charges 1999
To generate interest charges: 1999
Post FA Disbursements 2003
Notification of Receipt 2003
Disbursements for More than One Fund Source 2003
Direct Loan Disbursement File 2003
Servicer Processing 2003
Dropped Students 2004
To post FA disbursements: 2004
Posting Results 2005
Miscellaneous Receipts 2006

To post miscellaneous receipts: 2006
Post Charges 2012
To post a charge or adjustment transaction: 2012
Post Payments 2014
To post payments: 2014
Posting Cash/Other Payment Plans (Reamortizing future payments) 2019
Audit Features 2021
Credit Cards 2023
To post a payment with a credit card: 2023
To post refunds with a credit card: 2027
PayPal Account Configuration 2028
Post Individual Refunds 2031
Updating the Direct Loan Disbursement File 2031
ACH Processing 2031
To post a manual refund: 2032
Audit Features 2035
Post Individual Stipends 2036
Scheduling and Disbursement 2036
To post individual stipends: 2037
Audit Features 2038
Transaction Search 2039
To perform a transaction search: 2039
Cash Drawer Session Management 2047
To perform management tasks with Cash Drawers: 2047
Adjusting a Transaction 2048
Reconciling Cash Drawers 2050
To reconcile a session: 2050
Student Payment Statements 2052
To print student statements: 2052
Student Account Balance Statements 2058
To generate a Student Account Balance Statement: 2058
Student Account Activity Statements 2064
To generate a Student Account Balance Statement: 2064
Registration Bill 2069
To run the Registration Bill wizard: 2069
Third Party/Agency Invoices 2074

To generate a third party invoice: 2074
Third Party/Agency Invoice Approval 2080
To generate a third party invoice: 2080
Bank Deposits 2082
To prepare the Bank Deposit: 2082
Edit/Cancel Scheduled Refunds 2086
To edit or cancel scheduled refunds: 2086
Audit Features 2088
Process Refunds/Stipends 2089
Integration with an Accounting System 2089
Integration with CampusNexus Finance, HR & Payroll 2089
Refund Checks 2090
Stipend Checks 2091
To process scheduled stipends, refunds, or subsidiaries: 2091
ACH Refund 2094
ACH Stipends 2095
Refund Checks 2095
Stipend Checks 2096
Credit Card Refund 2096
EFT or Net Stipends 2096
Void/Reschedule Master Checks 2100
To void or reschedule a master check: 2100
Process Electronic Drafts 2102
To process (send) electronic drafts: 2102
Process 1098-T (2007 and Prior) 2107
2007 and Prior Award Year Processing 2107
To process 1098-Ts for selected students: 2108
1098-T Reporting Methods 2111
Print 1098-Ts 2111
To print 1098-Ts: 2111
Export 1098-Ts 2112
To export 1098-Ts: 2113
Revenue Recognition 2114
Revenue Recognition Options 2114
Revenue Calculation Details 2115
Earnings Period Start Dates 2115

Earn on "Incompletes" 2115
Revenue Recognition Exception Report 2115
Revenue Recognition Wizard 2115
To run the Revenue Recognition Wizard: 2115
Evaluate 2118
Example of Revenue Recognition with Earnings Based on Academic Years 2122
Example of Revenue Recognition with Carryover Units for Billed by Academic Year and Earned by Attended Hours 2123
Examples of Billed by Parent Term and Earned by Child Term 2124
Add Adjustment 2124
Reverse Revenue Recognition 2126
To reverse revenue recognition: 2126
CampusVue Finance, HR & Payroll Bank Reconciliation 2127
New Bank Reconciliation Form 2128
Admin Preferences 2128
Deposit Type Grouping on Bank Reconciliation Form 2129
Deposit Line Item Details 2130
Viewing the Batch ID 2131
Example Bank Reconciliation Forms 2131
2135
Financial Aid Disbursement Check 2136
Date Column Details 2137
First Form 2138
First Form - Second Screen 2138
First Form - Third Screen 2139
Financial Aid Disbursement EFT 2139
On Bank Reconciliation Form 2141
Student Payment - ACH 2142
On Bank Reconciliation Form - Deposit 1 2143
On Bank Reconciliation Form - Deposit 2 2145
Summation of Cash Accounts 2147
Deposits for CV44729 2152
Release to Integrated Accounting System 2164
Release to Integrated Accounting System Wizard 2165
To release transactions to CampusVue Finance, HR & Payroll: 2165
To release transactions to CampusNexus Finance, HR & Payroll: 2171

Creating Journal Entries for an Integrated Accounting System 2175
Revenue Recognition Journal Entry Groups 2175
Bank Deposit Journal Entry Groups (CampusVue Finance, HR & Payroll) 2175
Bank Deposit Journal Entry Groups (CampusNexus Finance, HR & Payroll) 2176
Adjust Transaction (NSF - returned checks) (CampusVue Finance, HR & Payroll) 2176
Miscellaneous Receipts Journal Entry Groups 2177
Stipend and Refund Check Printing (CampusVue Finance, HR & Payroll) 2177
Stipend and Refund Check Printing (CampusNexus Finance, HR & Payroll) 2177
Processing Voids 2178
Ledger Cards (CampusVue Finance, HR & Payroll) 2178
Ledger Cards (CampusNexus Finance, HR & Payroll) 2179
Subsidiary Transaction 2179
Configuring Automated Release to the Integrated Accounting System (CampusVue Finance, HR & Payroll) 2179
Release to General Ledger 2180
Financial Aid Fund Sources 2180
Reports 2180
To release transactions to your G/L system (create a transaction list and file): 2180
Period End Dates 2184
To change the Minimum Transaction Date: 2184
Student Subsidiaries 2185
To create a subsidiary: 2185
To post payments or charges to a subsidiary: 2186
Audit Features 2188
Configure Balance 2190
To configure a maintained balance: 2190
Subsidiary Statements 2191
To print subsidiary statements: 2191
Schedule Refunds/Transfer Balances 2196
Batch Process 2196
Audit Features 2198
Post Payments 2199
To post payments: 2199
Posting Cash/Other Payment Plans (Reamortizing future payments) 2204
Audit Features 2206
Process Tuition Discounts 2208
To post tuition discounts using the Process Tuition Discounts batch process: 2208

California STRF Processing 2211
To process students for STRF: 2211
Title IV Credit Balance 2212
Authorization Changes to Trigger Credit Balance Reevaluation 2212
Generating Stipends with a Non-Title IV Credit Balance Remaining 2212
Generating Stipends with a Title IV Credit Balance Remaining 2212
Fund Source Order Configuration 2212
Title IV Credit Balance Wizard 2213
To open the Title IV Credit Balance wizard: 2214
Configure Payment Apply Order 2216
To configure a payment apply order: 2216
To copy a payment apply order: 2218
Manage Unapplied Credits 2220
To manage unapplied credits: 2220
Manage Attendance Posting 2223
To manage attendance posting: 2223
Daily > Academic Records Options 2224
Create Student Alumni Record 2225
To create an alumni student record: 2225
Document Tracking 2227
To edit tracking data for listed documents: 2227
Schedule Classes 2230
Variable Class Schedules 2230
Automatic Attendance Warnings and Drops 2230
Integration with CampusNexus Finance, HR & Payroll 2230
To add or edit a class schedule: 2231
Class Schedule - Schedule Tab 2240
Class Schedule - Instructors Tab 2242
To assign attributes to an instructor: 2242
Class Schedule - Class Comments Tab 2243
Class Schedule - Attendance Rules Tab 2244
Auto Drop After 2244
Absence Warning 2244
Makeup Hour 2244
Student Specific 2245
Class Schedule - Waitlist Tab 2246

Waitlist Tab 2246
Waitlist Options 2246
Waitlist/Auto Add Course Section 2246
Auto Add Course Section options 2247
Current Section 2247
Waiting List 2247
Auto Add Course Section tab 2247
Important Notes 2248
Class Schedule - Portal Options Tab 2249
Hide Faculty 2249
Hide Location 2249
Secondary Teachers 2249
Class Schedule - Section Fees Tab 2250
To view the Fees Associated with a Fees Schedule: 2250
Class Schedule - Book List Tab 2251
To add a book: 2252
Class Schedule - Documents Tab 2254
View Weekly Schedule 2255
Cross Listed Courses 2256
To cross list a course: 2256
Copy Class Schedule 2258
Copy Entire Term 2258
To copy the class schedule from one term to another: 2258
Copy Class Section 2259
To copy data from one class section to another: 2260
Edit Class Scheduling and Attendance 2262
To modify the detail schedule: 2262
Floating Term Class Scheduling 2266
Students in Scheduled Class 2274
To display the roster for a class section: 2274
Lessons 2277
To set up lessons for a class section: 2277
Class Section Attendance 2280
Posting Attendance for Unscheduled Classes 2280
Dependent Course 2280
Attendance cannot be posted for dates beyond the current system date. 2280

To enter attendance for a selected class section: 2281
Attendance for Unscheduled Classes 2283
Grades 2284
To post final grades for a class section from this menu option: 2284
Copy Section 2287
To copy a class section: 2287
Unschedule Classes 2288
To unschedule selected class sections for a given date: 2288
Dependent and Parent Courses 2289
Define Term Registration Groups 2292
To define a term registration group: 2292
Setup Registration Tracks 2298
To work with a registration track: 2298
To copy a registration track: 2300
Registration 2302
Parent and Dependent Courses 2302
To register a batch of students in a class section: 2303
To register a batch of students in a class section by term: 2303
To register a batch of students in a class section by track: 2307
Registration Validation 2309
Track Registration Exception Report 2310
Copy Registration Tracks 2312
To copy a registration track: 2312
Registration Bill 2314
To run the Registration Bill wizard: 2314
Batch Unregister Courses Wizard 2319
To unregister a batch of students from a course: 2319
Rosters 2324
To print Attendance Rosters for class sections: 2324
Rosters 2328
To print Attendance Rosters for class sections: 2328
Record Attendance 2332
Automatic Drops and Attendance Warnings 2335
To record class section attendance: 2335
Record Attendance Dates 2338
To record attendance dates for a class section in which no regular attendance is posted: 2338

Grade Book 2340
To post lesson and exam grades using the grade book: 2340
Midterm Grades 2342
To post Midterm grades: 2342
Final Grades 2344
To post final grades for a class section: 2344
Unposted Grades Report 2346
Grading and Retakes 2348
Grade Scale Code Setup 2348
Grade Scales for Program Versions 2348
Course Retake Override 2348
Registration for Courses with Retake Override Configured 2348
Honors and Comments 2351
To post Honors and Comments: 2351
Configuring Online Registration 2353
To set up the Online Registration Configuration: 2353
Scantron Overview 2362
Attendance 2362
Final Grades 2365
Setup and Processing 2368
Print SCANTRON Rosters 2369
Scan Rosters 2370
Roster Maintenance 2372
Scantron Roster Status Report 2372
Setting Up a Scantron Interface 2372
Forms 2374
Scantron Daily 2375
To work with the daily SCANTRON procedures: 2375
Print Scantron Rosters 2377
Attendance Rosters 2377
To print Attendance Rosters: 2377
Final Grade Roster 2380
Scan Rosters 2381
To scan attendance or final grade forms: 2381
Rejected Forms 2382
Scan Attendance 2383

Scan Final Grades ... 2383
Scantron Roster Maintenance ... 2384
To work with the Scantron Roster Maintenance feature: ... 2384
Troubleshooting Scantron ... 2386
Instructor Maintenance ... 2392
Associate Instructors to Courses ... 2394
To associate instructors to courses ... 2394
Select by Course ... 2396
Select by Instructor ... 2397
Select By Owner ... 2399
Status Change in Academic Records ... 2402
To change the status of a student: ... 2402
Notes on Status Changes ... 2403
Changing Status from Active to LOA ... 2403
Temporary Out Status ... 2403
Graduate Status Change ... 2403
Never Attended or Cancellations ... 2403
Non-Degree-Seeking (NDS) Student Statuses ... 2403
Changing Attending Status to Permanent Out/Drop ... 2404
Default Date Calculation for Drop Status Changes ... 2407
Date of Determination ... 2407
NSLDS Withdrawal Date ... 2407
Type 1 - Attendance Required by an Outside Entity ... 2407
Type 2 - Attendance Not Required by an Outside Entity, however Institutional Attendance/Withdrawal Policy Exists ... 2407
Type 3 - Non-Attendance Taking Institution: ... 2407
Batch Status Change ... 2410
Non-Degree-Seeking (NDS) Students Statuses ... 2410
To change the status for a batch of students: ... 2411
Close/Reopen Term ... 2413
Population Analysis/IPEDS Enrollment Survey ... 2415
To run the Population Analysis Cube: ... 2415
IPEDS Completions Survey ... 2420
To run the IPEDS-Completions Survey cube report: ... 2420
Processing a SAP Calculation ... 2423
To process the SAP calculation: ... 2423

Reviewing Automated SAP Calculations 2428
To review Automated SAP Calculations: 2428
Process Queued Transfers 2430
To process queued transfers: 2430
Identify Failed Course Prerequisite Rules 2432
To identify failed course prerequisite rules: 2432
Report Configuration Academic Records THECB Reports 2434
To configure THECB reports: 2434
Graduation Report - CBM009 Configuration 2435
To Configure the report: 2435
Report Configuration Academic Records THECB Reports 2436
To configure THECB reports: 2436
Graduation Report - CBM009 Configuration 2436
To Configure the report: 2436
Report Extract Academic Records THECB Reports 2438
To extract and generate THECB reports: 2438
Student Enrollment Report (CBM001) 2438
Graduation Report (CBM009) 2439
Report Extract Academic Records ICUT Reports 2440
To extract and generate ICUT reports: 2440
Fall Enrollment by Ethnicity Report 2440
Survey of Freshman Retention Report 2440
Twelfth Day Headcount Enrollment Report 2441
Registration Extract Status 2442
Configuration Setup Options 2442
Filtering Records 2443
Results Grid 2444
Generate Batch Transcripts 2446
To save transcripts as PDF files: 2446
Daily > Distance Education 2450
Lesson Receipt 2451
To record a lesson receipt: 2451
Lesson Grading 2453
To record a lesson grade: 2453
Course Rewrites 2455
To enter a Course Revision record: 2455

To edit an existing course revision record: 2456
To remove an item from the course revision list 2456
Instructor Payment Processing 2457
Process Instructor Payments 2457
To perform the Instructor Payment Processing procedure: 2457
Lesson Payment Report 2459
Selection Criteria 2459
Sort Variables 2459
Date Ranges 2459
Comparison Variables 2459
Additional Header Information 2459
Detail Line Columns 2459
Course Payment Report 2460
Selection Criteria 2460
Sort Variables 2460
Date Ranges 2460
Comparison Variables 2460
Additional Header Information 2460
Detail Line Columns 2460
Course Revisions Report 2461
Selection Criteria 2461
Sort Variables 2461
Date Ranges 2461
Comparison Variables 2461
Additional Header Information 2461
Detail Line Columns 2461
Daily > Career Services 2462
Document Tracking 2463
To edit tracking data for listed documents: 2463
Employers 2466
Employer Search 2466
To find an employer: 2466
Employers Form 2468
Employer Contact Search 2469
To find an Employer Contact: 2469
Available Jobs Search 2472

To find available jobs: 2472
Employer Groups 2475
Placement History Tab 2476
Employer Groups 2477
Group Types 2478
Dynamic Group 2478
Static Group 2478
Frozen Group 2479
Manual Group 2479
Group Type Change Warning 2479
View Employers 2479
Search Groups 2479
Clear Search Results 2479
Schedule Activity 2479
Adding a Manual Group 2480
To add a manual group: 2480
Deleting a Group 2481
To delete a group: 2481
Address 2482
To edit an employer address: 2482
Employer Comments 2486
To enter or view comments for a selected employer: 2486
Contacts 2488
To add a new contact for an employer, or to view or edit an existing one: 2488
Placement History 2493
To view an employer's placement history: 2493
Employer Activities 2497
To work with the employer activities forms: 2497
Employer Audit 2500
To view the employer audit information: 2500
Available Jobs 2504
To add or edit an available job: 2504
To copy a job description: 2505
Job Candidate Search 2509
Employer Letters Overview 2514
Edit Employer Letters 2515

To edit a letter: 2515
Print Employer Letters 2516
To print a letter: 2516
Update Placement Status / Advisors 2518
To perform a batch status change to students' placement status: 2518
Reassign Employers 2522
To reassign employers from one advisor to one or more other advisors: 2522
Process Online Employers 2527
Employer Registration 2527
Employer Processing 2527
To add a new employer: 2527
Daily > Loan Management 2530
Document Tracking 2531
To edit tracking data for listed documents: 2531
Status Update 2534
To run the Status Update wizard: 2534
Daily > Student Services > Batch Assign Services 2536
To assign services in batch mode: 2536
Daily > Housing 2540
Search Applications 2541
To search and view housing applications submitted by students: 2541
Roommate Matching 2543
To run a roommate match: 2543
Post Rent Charges 2552
To Post outstanding rent charges: 2552
Move Out or Renewal 2553
To move-out student batches: 2553
To renew housing leases for student batches: 2553
Reports Menu 2555
Reports Overview 2556
General Features of Reports 2556
Using the Report Selection Form 2557
Report Preference 2557
To load or save report preferences: 2557
Sort Variables and Selected Sort Order 2557
To select and sort variables: 2558

Campus Selection Tab 2558
To specify the Campus or Campus Group selection criteria: 2558
Selection Tab 2559
To filter data using the Selection tab on the Report Selection form: 2559
Student Groups Tab 2561
To filter data using the Student Groups tab on the Report Selection form: 2562
Employer Groups Tab 2562
Use Report Server 2563
Using the Report Wizard 2565
To run a report using the report wizard: 2565
Using the Report Viewer 2569
Main Window 2569
Tabs 2569
Report Viewer Menus 2569
Report Menu 2569
Mail Merge Menu 2571
Excel Menu 2572
Report Viewer Controls 2573
Working with Cube Reports 2574
To view a sample cube report: 2574
Printing Reports 2580
Executive Summary Report 2581
To run the Executive Summary Report: 2581
2582
Booked Futures Summary 2583
To set up the Booked Futures Summary section: 2583
Cash Receipts Summary 2584
To set up the Cash Receipts Summary section: 2584
Cost Analysis Breakdown by Lead Category 2585
To set up the Cost Analysis Breakdown by Lead Category section: 2585
Cost Analysis Breakdown by Lead Source 2586
To set up the Cost Analysis Breakdown by Lead Source section: 2586
Expected/Past Due Cash Summary 2587
To set up the Expected/Past Due Cash Summary section: 2587
FA Packaging Status Summary 2588
To set up the FA Packaging Status Summary section: 2588

Lead Conversion Breakdown by Admissions Rep - Summary 2589
To set up the Lead Conversion Breakdown by Admissions Rep - Summary section: 2589
Lead Conversion Breakdown by Admissions Rep Type - Summary 2591
To set up the Lead Conversion Breakdown by Admissions Rep Type - Summary section: 2591
Lead/Enrollment/Start Breakdown by Lead Source 2593
To set up the Lead/Enrollment/Start Breakdown by Lead Source section: 2593
Lead/Enrollment/Start Breakdown by Lead Source Category 2594
To set up the Lead/Enrollment/Start Breakdown by Lead Source Category section: 2594
Placement Summary Section 2595
To set up the Placement Summary Section section: 2595
Population Analysis Detail 2596
To set up the Population Analysis Detail section: 2596
Population Analysis Summary 2597
To set up the Population Analysis Summary section: 2597
Show Rate Breakdown by Admissions Rep 2598
To set up the Show Rate Breakdown by Admissions Rep section: 2598
Show Rate Breakdown by Admissions Rep Type 2599
To set up the Show Rate Breakdown by Admissions Rep Type section: 2599
Contact Manager Reports 2600
Activity Detail 2601
To run the report: 2601
Do Not Call List 2603
To run the report: 2603
Do Not Call List (No Phone Number) 2604
To run the report: 2604
Document Tracking Report 2605
To run the report: 2605
FERPA Opt-out Listing 2607
To run the report: 2607
Incident Details 2609
To run the report: 2609
Outstanding Transcript Requests 2612
To run the report: 2612
Permit Document Tracking 2614
To run the report: 2614
Scan Cover Sheet 2616

To run the report: 2616
Staff Listing 2618
To run the report: 2618
Student Activities 2620
To run the report: 2620
Activity Analysis 2622
To run the report: 2622
Contact Manager Reports 2624
Document Tracking 2625
To run the report: 2625
Enrollment Status Comparison 2627
To run the report: 2627
Master Student Listing Detail 2629
To run the report: 2629
Master Student Listing Summary 2631
To run the report: 2631
SEVIS Export Report 2633
To run the report: 2633
SEVIS Import Report 2635
To run the report: 2635
Student Report 2636
To run the report: 2636
Students with Dependents 2638
To run the report: 2638
Demographics 2640
To run the report: 2640
Admissions Reports 2642
Admissions Campus Lead Conversion 2643
To run the report: 2643
Admissions Deposits 2645
To run the report: 2645
Admissions Rep Lead Conversion 2647
To run the report: 2647
Data Changes Report 2650
To run the report: 2650
Entrance Test Batch Import Detail 2652

To run the report: 2652
Entrance Test Detail Report 2654
To run the report: 2654
Entrance Tests 2656
To run the report: 2656
2657
High School Contacts 2658
To run the report: 2658
Interviews not Enrolled 2660
To run the report: 2660
Lead Expenses by Category 2662
To run the report: 2662
Lead Master Listing Detail 2664
To run the report: 2664
Lead Master Listing Summary 2666
To run the report: 2666
Lead Source Performance 2668
To run the report: 2668
Leads not Interviewed 2670
To run the report: 2670
Start Date 2672
To run the report: 2672
Starts - Actual vs. Budget 2674
To run the report: 2674
Student Previous Education 2676
To run the report: 2676
Lead Summary by Source 2678
To run the report: 2678
Leads Analysis 2680
To run the report: 2680
Start Date Enrollment Stats 2683
To run the report: 2683
Financial Aid Reports 2685
2003-2004 Signature Hold 2687
To run the report: 2687
Academic Year and Graduation Date Audit 2689

To run the report: 2689
ACG Data Report 2692
To run the report: 2692
COD Disbursement Analysis 2694
To run the report: 2694
COD Extract Report 2697
To run the report: 2697
COD Grant Origination Status 2699
To run the report: 2699
COD Grant Tracking Report 2701
To run the report: 2701
COD Response Import 2703
To run the report: 2703
Direct Loan Analysis Report 2705
To run the report: 2705
Direct Loan Disbursement Batch Activity 2708
To run the report: 2708
Direct Loan Origination Batch Activity 2710
To run the report: 2710
Direct Loan Origination Change Batch Activity 2712
To run the report: 2712
Disbursement Batches Not Reconciled 2714
To run the report: 2714
Expected Cash Flow Detail Report 2716
To run the report: 2716
Expected Cash Flow Summary 2718
To run the report: 2718
FA Batch Posting Work Study 2720
To run the report: 2720
FA Disbursement Batch Tracking 2722
To run the report: 2722
FA Export/Import Batch Tracking 2725
To run the report: 2725
FA Status Report 2728
To run the report: 2728
FAFSA Status 2730

To run the report: 2730
FAGL Chart of Accounts Report 2732
To run the report: 2732
Federal Parent PLUS Dependency Status Conflicts 2734
To run the report: 2734
Federal Work Study Reconciliation Report 2736
To run the report: 2736
Financial Aid G/L Authorization Detail 2737
To run the report: 2737
Financial Aid G/L Authorization Summary 2739
To run the report: 2739
Financial Aid G/L Transaction Detail 2741
To run the report: 2741
Financial Aid G/L Trial Balance 2743
To run the report: 2743
FISAP or FISAP Detail Reports 2745
To run the report: 2745
FISAP or FISAP Detail Reports (Prior to 2005-06) 2747
To run the report: 2747
Fund Source Activity Summary Report 2749
To run the report: 2749
HOPE Evaluation Report 2751
To run the report: 2751
HOPE Summary Report 2753
To run the report: 2753
ISIR Summary Report 2755
To run the report: 2755
Packaged Enrollment Status 2758
To run the report: 2758
Packaging Summary 2760
To run the report: 2760
Past Due Summary Cash Flow 2763
To run the report: 2763
Progress Report 2765
To run the report: 2765
Refund Details 2767

To run the report: 2767
Remaining Balance To Schedule (Acad. Year) 2770
To run the report: 2770
Remaining Balance To Schedule (Full Program) 2773
To run the report: 2773
Remaining Balance To Schedule (Term) 2775
To run the report: 2775
Remaining Balance to Schedule by Course 2777
To run the report: 2777
Student Financial Aid History 2780
To run the report: 2780
Student Financial Aid Summary 2783
To run the report: 2783
Student Financial Aid Summary by Payment Period 2786
To run the report: 2786
Student Financial Aid Summary By Term 2787
To run the report: 2787
Students Failing Disbursement Criteria 2789
To run the report: 2789
Unmatched ISIRs 2792
To run the report: 2792
Student Account Reports 2794
1098-T Summary Report (2007 and Prior) 2795
To run the report: 2795
1098-T Summary Report (2003 to 2007) 2797
To run the report: 2797
90-10 Report by Revenue Source 2799
Determining Revenue 2799
Stipends as adjustments to revenue 2799
Adjustments to revenue received in the prior year 2799
Refunds/Revenue Adjustments 2799
Title IV Credit Balances 2799
Application of Funds 2799
90-10 Calculation 2800
Calculate and report for Eligible Programs and Non-Eligible Programs 2800
Calculate and report based on enrollment at institution when student enrolled in multiple campuses 2801

Eligible Institutional Charges 2801
Carryover Charges 2801
Current Year Charges 2801
Total Available Institutional Charges 2801
To run the report: 2802
Account Aging Report 2806
To run the report: 2806
Account Summary 2808
To run the report: 2808
ACH Batch Detail 2810
To run the report: 2810
ACH Batch Report 2812
To run the report: 2812
Campus Period End Dates 2814
To run the report: 2814
Cash Drawer Session Report 2816
To run the report: 2816
Cash Receipts Detail 2818
To run the report: 2818
Cash Receipts Summary by Fund Source 2821
To run the report: 2821
Credit Card Transactions 2823
To run the report: 2823
Detail Subsidiary Transaction Register 2825
To run the report: 2825
Detail Transaction Register 2828
To run the report: 2828
Drop Report 2831
To run the report: 2831
Earned/Prepaid A/R Report 2835
To run the report: 2835
Enrollment Account Balance 2837
To run the report: 2837
General Ledger Accounts 2839
To run the report: 2839
General Ledger Posting Detail 2841

To run the report: 2841
Ledger Card Report 2843
To run the report: 2843
Miscellaneous Cash Receipts 2845
To run the report: 2845
Month End Process Report 2847
To run the report: 2847
Refund Calculation Summary 2848
To run the report: 2848
Refund Check Register 2850
To run the report: 2850
Revenue Detail 2852
To run the report: 2852
Revenue Earning Exceptions 2855
To run the report: 2855
Revenue Earnings - Carryover Units 2857
To run the report: 2857
Revenue Preliminary 2860
To run the report: 2860
Revenue Summary 2861
To run the report: 2861
Scheduled Refunds 2864
To run the report: 2864
Scheduled Subsidiary Refunds 2866
To run the report: 2866
Stipend Schedule 2868
To run the report: 2868
Student Account Balance 2870
To run the report: 2870
Student Information Statement (2007 and Prior) 2872
To run the report: 2872
Subsidiaries 2874
To run the report: 2874
Title IV Credit Balance 2876
Filtering the Title IV Credit Balance Wizard or Title IV Credit Balance Report by Loan Period 2876
Filtering the Title IV Credit Balance Wizard or Title IV Credit Balance Report by Award Year 2876

Proration Logic 2876
Term-based students 2876
Non-term based students 2877
Non-standard term based not SE9W students 2877
To run the report: 2877
Credit Balance Waiver 2880
Transaction Adjustments 2882
To run the report: 2882
Accounts Receivable 2884
To run the report: 2884
Bank Deposit Report 2887
To run the report: 2887
Future Charge Verification 2890
To run the report: 2890
Receipts by Source 2892
To run the report: 2892
Revenue Earnings 2894
To run the report: 2894
Academic Records Reports 2896
Absences by Consecutive Days 2898
To run the report: 2898
Absences by Consecutive Days by Course 2900
To run the report: 2900
Absences by Days 2902
To run the report: 2902
Absences by Days by Course 2904
To run the report: 2904
Academic History and Advising Report 2906
To run the report: 2906
Area of Study Change Report 2908
To run the report: 2908
Area of Study Student Listing Report 2910
To run the report: 2910
Attendance Summary 2912
To run the report: 2912
Attendance Summary by Program for Clock Hour 2914

To run the report: 2914
Classes Missed Report 2917
To run the report: 2917
Class Meeting Pattern 2919
To run the report: 2919
Class Rank 2921
To run the report: 2921
Class Rank (Overall) 2923
To run the report: 2923
Class Roster by Course 2925
To run the report: 2925
Class Roster by Instructor 2927
To run the report: 2927
Class Schedule 2929
To run the report: 2929
Class Schedule Book Listing Detail 2931
To run the report: 2931
Class Schedule by Room 2933
To run the report: 2933
Class Schedule with Instructor Attributes 2935
To run the report: 2935
Course Drops 2937
To run the report: 2937
Course Waitlist Report 2940
To run the report: 2940
Detail Attendance 2941
To run the report: 2941
Drop Report 2944
To run the report: 2944
Final Grade 2946
To run the report: 2946
Final Grades Work Sheets 2948
To run the report: 2948
Gainful Employment Error/Acknowledgement 2950
To run the report: 2950
Gainful Employment Export 2952

To run the report: 2952
GPA Average Range 2954
To run the report: 2954
Grade Changes Audit 2956
To run the report: 2956
Instructor Attendance Analysis 2958
To run the report: 2958
Instructor Course Association 2960
To run the report: 2960
Instructor Drop Analysis 2962
To run the report: 2962
Lesson Report 2964
To run the report: 2964
Lesson Status 2966
To run the report: 2966
Locked Term Sequence Courses 2969
To run the report: 2969
Master Student Listing Detail 2971
To run the report: 2971
Master Student Listing Summary 2974
To run the report: 2974
Midterm Report Card 2977
To run the report: 2977
Online/Extern Course Requirements 2979
To run the report: 2979
Percentage of Classes Missed 2981
To run the report: 2981
Posted/Unposted Attendance 2983
To run the report: 2983
Posted/Unposted Grades 2985
To run the report: 2985
Posted/Unposted Midterm Grades 2987
To run the report: 2987
Potential Graduates 2989
To run the report: 2989
Practicum Eligible Students 2991

To run the report: 2991
Progress Report 2993
To run the report: 2993
Registered Credits by Confirmed Terms 2995
To run the report: 2995
Registered Credits by Term 2997
To run the report: 2997
Report Cards 2999
To run the report: 2999
Retaken Courses 3001
To run the report: 3001
SAP Audit Report 3003
To run the report: 3003
SAP Enrollment Detail Report 3007
To run the report: 3007
SAP Job Failure Report 3009
To run the report: 3009
SAP Payment Period Detail Report 3010
To run the report: 3010
SAP Term Detail Report 3012
To run the report: 3012
Scantron Roster Status Report 3014
To run the report: 3014
Scheduled Return from LOA 3016
To run the report: 3016
Selected Letter Grade Report 3018
To run the report: 3018
Status Change Discrepancies 3020
To run the report: 3020
Student Based Transcript 3022
To run the report: 3022
Student Daily Schedule 3024
To run the report: 3024
Student Degree Evaluation Report 3026
To run the report: 3026
Student Schedule 3028

To run the report: 3028
Student Status Changes 3030
To run the report: 3030
Term Registration Analysis 3032
To run the report: 3032
Term Relationship 3034
To run the report: 3034
Transcripts-Official 3036
To run the report: 3036
Transcripts-Unofficial 3039
To run the report: 3039
Class Section Registration 3042
To run the report: 3042
Course Drop Statistics 3044
To run the report: 3044
Demographics 3046
To run the report: 3046
Future Course Seat Requirements 3048
To run the report: 3048
Instructor Grade Analysis 3050
To run the report: 3050
Term Enrollment Summary 3052
To run the report: 3052
Distance Education Reports 3054
Class Status Summary by Course 3055
To run the report: 3055
Class Status Summary by Instructor 3057
To run the report: 3057
College Student Roster 3059
To run the report: 3059
Course Lesson Log 3061
To run the report: 3061
Extensions Report 3063
To run the report: 3063
High School Student Roster 3065
To run the report: 3065

Instructors Payment History 3067
To run the report: 3067
Lesson Tracking 3069
To run the report: 3069
Registration by Student 3071
To run the report: 3071
Student Balance / Course Status 3073
To run the report: 3073
Career Services Reports 3075
Certifications 3076
To run the report: 3076
Employer Master Listing 3078
To run the report: 3078
Job Conversion Rate 3080
To run the report: 3080
Job List (Single) 3083
To run the report: 3083
Job List Summary 3085
To run the report: 3085
Job Listing 3088
To run the report: 3088
Placement Misc Stats 3090
To run the report: 3090
Placement Reason Summary 3092
To run the report: 3092
Placement Salary Report 3094
To run the report: 3094
Placement Stats by Time 3097
To run the report: 3097
Placement Status Report 3100
To run the report: 3100
Placement Verification Report 3102
To run the report: 3102
Placements Stats 3104
To run the report: 3104
Placements Stats by Field of Study 3107

To run the report: 3107
Potential Graduates Needing an Externship 3110
To run the report: 3110
Practicum Course Registration Report 3112
To run the report: 3112
Student Placement Details 3113
To run the report: 3113
Students by Resume Status 3115
To run the report: 3115
Cube Report Placement Stats 3117
To run the report: 3117
Loan Management Reports 3121
Cohort Rate Report 3122
To run the report: 3122
Exit Interview 3124
To run the report: 3124
Expected Graduates with Loans 3127
To run the report: 3127
Loan Status Report 3129
To run the report: 3129
Student Services Reports 3131
Athletics Eligibility in Years Report 3132
To run the report: 3132
Athletics Equity Report 3134
To run the report: 3134
Athletics Financial Aid 3135
To run the report: 3135
Disability Services 3136
To run the report: 3136
Housing Assistance 3138
To run the report: 3138
Veteran Information Report 3140
To run the report: 3140
Housing Reports 3142
Academic Year Dates Comparison Report 3143
To run the report: 3143

Available Housing 3145
To run the report: 3145
Current Occupants By Room Type 3147
To run the report: 3147
Housing Exception Report 3148
To run the report: 3148
Housing Population Percentage 3149
To run the report: 3149
Housing Requirement Progress 3151
To run the report: 3151
Housing Start Rates 3153
To run the report: 3153
New Student Occupants 3155
To run the report: 3155
Occupancy Count 3157
To run the report: 3157
Occupants by Lease and Graduation Dates 3158
To run the report: 3158
Overbooked Rooms 3160
To run the report: 3160
Persistence Report 3161
To run the report: 3161
Student Move Out Details 3163
To run the report: 3163
Students Requiring Housing Assignment 3165
To run the report: 3165
Custom Reports 3167
To customize a generic CampusNexus Student report: 3167
Creating Custom Reports 3169
To create a Custom Report: 3169
Selecting and Sorting Records 3173
To select records from a report: 3173
To sort records in a report: 3174
Using the Report Selector 3175
To view a report using the Report Selector: 3175
Window Menu 3176

Tools Menu **3177**
Tools > Contact Manager 3178
National Do Not Call Import 3179
New Database Installation 3179
To import the Do Not Call Registry: 3179
Masking of Phone Numbers 3181
National Do Not Call Student Update 3182
To update phone numbers: 3182
Do Not Call Registry Reporting 3183
Deleting Batch Activities 3184
To delete activities in a batch mode: 3184
Import ZIP Code Data 3187
To import a ZIP code data file: 3187
Unlocking Activities 3188
To unlock activities: 3188
Tools > Admissions 3191
Test File Layout Entry 3192
To add test file layouts: 3192
Tools > Financial Aid 3201
Manage COD Originations by Student 3202
To manage COD originations by student: 3202
Origination Tab 3202
Origination Changes Tab 3206
FISAP Data Correction 3207
Update Disbursement Information 3208
To update disbursement information: 3208
Fix Duplicate FaStudent Pell Records 3211
To fix a duplicate Pell record: 3211
Link Payments to Scheduled Disbursements 3214
To link a ledger card payment to a scheduled disbursement for an academic year: 3214
Update Award Information 3216
To update award information: 3216
Student Pace Evaluation (SPE) 3218
Scheduled Complete Flag 3219
Complete Flag 3219
Applying the flags with ‘Disallow Rolling Credits’ disabled: 3219

Applying the flags with ‘Disallow Rolling Credits’ enabled: 3219
Association between Courses and Payment Periods 3220
Executing Student Pace Evaluation and Payment Period Billing Steps in Sequential Order Automatically 3221
Prorating Logic 3221
Updating Graduation and Externship Dates 3222
Rules for subsequent payment period start dates: 3226
Rules for payment period end dates: 3226
Transfer Enrollment Settings for Payment Period Logic 3229
Course Retake Logic for Non-Term Programs within the Student Pace Evaluation Process 3229
Impact of SPE on Overlapping Loan Periods 3230
Configuring Multiple Disbursement Definitions 3232
Tools > Student Accounts 3234
Change Billing Method 3235
To change the billing method manually: 3235
Purge Billing Statement Records 3237
To Purge Billing Statement Records: 3237
Unlock Refunds/Stipends 3238
To unlock a stipend or refund manually: 3238
Reallocate Applied Credits 3239
To reallocate applied credits: 3239
Update Incremental Units/Offset 3242
To update incremental units/offset : 3242
Tools > Academic Records 3243
Updating Student Required Course Lists 3244
Student Pace Evaluation (SPE) 3249
Scheduled Complete Flag 3250
Complete Flag 3250
Applying the flags with ‘Disallow Rolling Credits’ disabled: 3250
Applying the flags with ‘Disallow Rolling Credits’ enabled: 3250
Association between Courses and Payment Periods 3251
Executing Student Pace Evaluation and Payment Period Billing Steps in Sequential Order Automatically 3252
Prorating Logic 3252
Updating Graduation and Externship Dates 3253
Rules for subsequent payment period start dates: 3257
Rules for payment period end dates: 3257
Transfer Enrollment Settings for Payment Period Logic 3260

Course Retake Logic for Non-Term Programs within the Student Pace Evaluation Process 3260
Impact of SPE on Overlapping Loan Periods 3261
Graduation and Externship Date Calculations 3263
Automated Updates 3263
Manual Updates 3263
Step 1: Calculate the Duration of the Remaining Classroom Time 3263
Duration of Remaining Classroom Time 3264
Step 2: Calculate the Duration of Remaining Externship Time 3264
Change Course Description 3267
To change a course description: 3267
Deactivate Start Dates 3268
To deactivate start dates: 3268
Archive Attendance 3270
To archive attendance data: 3270
To retrieve archived data for a student's enrollment: 3270
Modify Term Relationships 3271
To modify term relationships: 3271
Batch Catalog Assignment Tool 3274
To assign a group of students to a new catalog: 3274
Update Version Start Date 3277
To update the version start date: 3277
Update Grade Scale 3279
To update grade scales: 3280
Tools > Career Services 3284
Reassign Placement 3285
To reassign a placement: 3285
Convert Existing InSchool Employment Records 3287
To convert placement statuses: 3287
Regenerate Employer Codes 3288
To regenerate employer codes: 3288
Change Job Statuses (Batch) 3289
To change job statuses: 3289
Edit Placement Status History 3291
To view or modify placement status types: 3291
Tools > Loan Management 3292
Tools > System 3293

Merge Student Master Records ... 3294
To merge student master records: ... 3294
Purge Leads ... 3295
To purge leads: ... 3295
Edit Student Status History ... 3297
To edit a student's status history: ... 3297
Delete Credit Card Verification Code ... 3299
Export Student Data for Talisma Fundraising ... 3300
To set up the Talisma Fundraising integration: ... 3300
To use the Talisma Fundraising Student Export wizard: ... 3300
Setup Menu ... **3303**
Setup > System ... 3304
System Settings - General Tab ... 3305
To edit the system parameters on the General tab: ... 3305
System Settings - File Server & Services Tab ... 3317
To configure the file server settings: ... 3317
To configure Web Service locations: ... 3318
System Settings - Other Tab ... 3327
To allow groups to be saved from reports: ... 3327
System Settings - Integration Tab ... 3328
To configure integration with a CRM product: ... 3328
Campus Setup Form ... 3330
To set up a campus or campus group: ... 3330
Campus Information Form ... 3333
Campus Information - Academic Records Tab ... 3334
To add or edit academic records options for a campus: ... 3334
Configuration (Enforce Last Day to Withdraw) ... 3337
Course Registration Sharing Groups ... 3355
Prerequisites: ... 3355
To enable course registration sharing groups: ... 3355
To enable users for CRSG: ... 3356
Course Registration Sharing and Course Section Add/Drop Date Enforcement ... 3356
Student Waitlist Defaults ... 3358
To configure waitlist defaults: ... 3358
Registration Bill Defaults ... 3360
To configure registration bill defaults: ... 3360

Auto Add Course Section Setup ... 3362
To configure auto add course section: ... 3362
Campus Information - Accounting Tab ... 3365
To add or edit accounting data for a campus: ... 3365
Settings for GL System "Great Plains" ... 3371
Settings for CampusVue Finance, HR & Payroll ... 3372
Campus Information - Address Tab ... 3375
To add or edit address data for a campus: ... 3375
Campus Information - Allow Tab ... 3377
To allow or disallow enrollments and/or accounting transactions, or to select a label format: ... 3378
Contact Manager Setup - FERPA Groups Tab ... 3385
To create a FERPA directory group: ... 3386
FERPA Document Settings ... 3388
To opt out of this disclosure: ... 3388
Duplicate Lead Processing ... 3390
To process duplicate leads on Quick Lead and Student Master forms: ... 3390
School Defined Fields ... 3391
To configure the import of School Defined Fields when processing electronic leads: ... 3391
Configuring Duplicate Lead Processing Rules ... 3392
To configure duplicate lead processing rules: ... 3392
Campus Information - Career Service Tab ... 3396
To add or edit career services options for a campus: ... 3396
Campus Information - Contact Info Tab ... 3398
To add or edit contact information for a campus: ... 3398
Campus Information - Electronic Processing Tab ... 3400
VeriSign Requirements ... 3400
To add or edit electronic processing options for a campus: ... 3401
Online Student Payment Process ... 3403
Campus Information - Financial Aid Tab ... 3404
To add or edit financial aid information for a campus: ... 3404
Servicer Configuration ... 3414
To enter the data for Global: ... 3414
To continue further Global servicer configuration, proceed as follows: ... 3416
Document Tracking Tab ... 3416
Locking Academic Year/Loan Period Awards ... 3419
To enable this feature: ... 3419

Campus Information - Housing Tab 3420
To add or edit housing lease information for a campus: 3420
Campus Information - International Tab 3422
To add or edit SEVIS processing information for a campus: 3422
Campus Information - Options Tab 3424
To add or edit campus options: 3424
Campus Information - Refunds & Stipends Tab 3431
Refunds Subtab 3431
To add or edit refunds settings for a campus: 3431
Stipends Subtab 3435
To add or edit stipends settings for a campus: 3435
Campus Information - Student Services Tab 3448
To add or Athletic Association details for a campus: 3448
Campus Information - Transfer Opt. Tab 3450
To enter the transfer options setup information for a campus: 3450
Managing Campus Groups 3454
To add or edit a campus group: 3454
To delete a campus group: 3455
CampusVue Finance, HR & Payroll 3456
To set up campus groups: 3456
CampusNexus Finance, HR & Payroll 3458
Staff Maintenance Form 3459
To set up and modify Staff Members and Staff Groups: 3459
Active Directory Integration with CampusNexus Finance, HR & Payroll 3461
Sample Scenarios: 3462
Staff Information Form 3464
To enter or change general information for a staff member: 3464
Central Security Application Not Used 3464
Using Central Security Application 3465
Searching for Staff Members 3467
To search for a staff member: 3467
Adding or Editing a Staff Member 3469
To add or edit a staff member: 3469
Staff Information - General Tab - Deactivating a Staff Member 3470
To deactivate a staff member: 3470
Deleting a Staff Member 3471

Staff Information - General Tab - Pictures ... 3472
To import staff pictures: ... 3472
Staff Information - Groups Tab ... 3474
To assign the staff member to a group: ... 3474
To remove the staff member from a group: ... 3475
Staff Information - HR Info Tab ... 3476
To enter HR information for a staff member: ... 3476
Staff Information - Contact Manager Tab ... 3478
To assign Contact Manager options to a staff member: ... 3478
Staff Information - Work Address Tab ... 3480
To add or change work address information for a staff member: ... 3480
Assigning Staff Permissions ... 3482
To assign a password policy to a staff member: ... 3482
To change a staff member's password: ... 3483
To lock a staff member's account: ... 3483
User Info General Subtab ... 3484
User Info Student Accounts Subtab ... 3487
User Info Academic Records Subtab ... 3489
User Info Career Services Subtab ... 3493
User Info Financial Aid Subtab ... 3494
User Info Admissions Subtab ... 3495
User Info Housing Subtab ... 3497
Managing Staff Groups ... 3499
Advisors ... 3499
To add or edit a staff group: ... 3500
Deleting a Staff Group ... 3502
To delete a staff group: ... 3503
Setup Template Form ... 3504
To set up the staff group permissions template: ... 3504
Password Profiles ... 3507
To manage password profiles for staff members and groups: ... 3507
Adding Password Profiles ... 3509
To add a password profile: ... 3509
Viewing and Searching Password Profiles ... 3511
To view staff and associated password profiles: ... 3511
To search for a staff member in the profiles tool: ... 3511

Assigning Password Profiles ... 3513
To assign a password profile to a staff group: ... 3513
To assign a password profile to an unassigned staff group: ... 3513
To assign a password profile to a staff member: ... 3514
Removing a Password Profile ... 3516
To remove a password profile from a staff member: ... 3516
Modifying Your Password ... 3517
To change your password: ... 3517
Central Security Application ... 3518
Integration with Active Directory ... 3518
To set up access to Anthology Inc. products: ... 3518
Setup > Security ... 3524
To manage security access: ... 3524
To set up access by staff group: ... 3525
To set up access by menu: ... 3526
To set up access for shared groups: ... 3526
To set up delete letter permission by staff group: ... 3526
To set up delete letter permission by menu option: ... 3528
To run the Security Details report: ... 3529
Sign In ... 3531
Use CampusNexus Student Database Sign In ... 3531
Use Windows Login (Non-AD) Sign In ... 3531
To sign in (or log in) to CampusNexus Student: ... 3531
Use Active Directory Sign In ... 3532
Use Active Directory (single sign on) Sign In ... 3532
Setup > Status Codes ... 3534
Status Codes - Status Codes Tab ... 3535
Status Codes for Non-Degree Seeking Students ... 3535
Status Category ... 3536
System Status ... 3536
Status Hierarchy ... 3538
Manage School Statuses ... 3539
Add or edit a status code and definition ... 3539
Deactivate a school-defined status code definition ... 3540
Delete a school-defined status code definition ... 3540
Status Codes - Status Changes Tab ... 3542

To edit the status change rules: 3542
To change the values of School Status: 3544
Status Codes - Colors Tab 3546
To edit the student status background colors: 3546
Tracking Non-Degree-Seeking (NDS) Students 3549
NDS Setup 3549
NDS Programs and Courses 3550
Enrollment 3550
Status Changes 3550
Individual Status Changes 3550
Batch Status Changes 3551
Student Enrollment Information 3551
Transfer Enrollment 3551
Report Selection 3551
Refund Calculation 3551
Setup > Contact Manager 3553
Contact Manager Setup - Activity Policies Tab 3554
To add or edit a Contact Manager Activity Policy: 3554
To add or edit an Activity Policy: 3555
Contact Manager Setup - Document Policies Tab 3557
To set up or edit Document Policies: 3557
To add or edit a Document Policy: 3558
To delete a Document Policy: 3560
To assign a Document Policy to staff members or staff groups: 3560
To print a Document Policy: 3560
Contact Manager Setup - E-Mail Tab 3562
To set up e-mail: 3562
Contact Manager Setup - FERPA Groups Tab 3564
To create a FERPA directory group: 3565
Contact Manager Setup - Staff Group Permissions Tab 3567
To assign a Contact Manager Security policy to a staff member: 3567
Contact Manager Setup - Activity Settings Tab 3569
To change the Contact Manager Activity Settings: 3569
Setup > Admissions 3571
Admissions - General Tab 3572
To configure general admissions settings: 3572

Admissions - Additional Tab - Quick Lead Form Design 3576
To configure additional admissions settings: 3576
Admissions - Test Mapping Tab 3580
To configure the test mapping settings: 3580
Setup > Financial Aid 3583
Financial Aid Settings - Packaging Tab 3584
To set up financial aid packaging options: 3584
Financial Aid Settings - General Tab 3588
To set up general financial aid options: 3589
CampusVue Finance, HR & Payroll Work Study Integration 3592
Financial Aid Settings - Clearinghouse Tab 3593
To set up financial aid Clearinghouse options: 3594
Financial Aid Settings - Direct Loan Tab 3596
To set up direct loan information for a campus: 3597
Financial Aid Settings - COD Grants Tab 3602
To set up general COD grant options: 3603
Financial Aid Settings - Hold Codes Tab 3610
To set up hold codes: 3611
Financial Aid Settings - COD Tab 3614
To set up COD information for a campus: 3615
Financial Aid Settings - Promissory Note Tab 3617
To set up a Promissory Note: 3617
Fund Source Permissions 3620
To configure fund source permissions: 3620
Simple 3621
Advanced 3622
Notifications of Receipt 3624
To edit notifications of receipt from the Financial Aid Settings form: 3624
Default Notification of Receipt 3625
Lists > Financial Aid > Fund Sources 3625
Setup > Student Accounts 3627
Student Accounts Settings - General Tab 3628
To set up general options for student accounts: 3628
Settings for Great Plains 3632
Student Accounts Settings - Revenue Tab 3633
To set up the revenue options for student accounts: 3633

Student Accounts Settings - Additional Tab 3635
To set up additional features for student accounts: 3635
Student Accounts Settings - Hold Code Tab 3637
To set up hold for student accounts: 3637
Student Accounts Settings - Housing Tab 3638
To set up housing options for student accounts: 3638
Bank Accounts and Default Bank Accounts 3640
To set up or edit a bank account: 3640
Default Accounts by Fund Source 3642
To set up a default bank account for each fund source type: 3642
ACH Setup 3646
To set up ACH processing for your institution: 3646
ACH Payment Response Tab 3646
To add or remove a group with associated Payment Response Codes: 3647
ACH Notification of Change Tab 3648
ACH Refund/Stipend Response Tab 3648
To add or remove up a new group with associated Refund Response Codes: 3649
To generate an ACH batch processing report: 3649
ACH Setup - Processors 3650
To add or edit ACH processors: 3650
ACH Response Codes 3654
Credit Card Batch Setup 3660
To set up credit card batch processing: 3660
Batch Configuration 3660
To add or edit a credit card batch: 3661
Response Configuration 3662
To configure credit card batch processing response codes: 3663
GL Link 3664
To define the G/L links for each campus between CampusNexus Student and your general ledger system: 3664
Integrated Accounting 3668
To set up general ledger links when CampusNexus Student is integrated with an accounting system: 3669
G/L Export File Definition 3672
To configure files for export: 3672
Transaction Code Security 3678
To configure transaction code security for staff groups: 3678
Setup > Academic Records 3680

Academic Records Settings - Enrollment Tab ... 3681
To select optional steps for the enrollment wizard: ... 3681
Academic Records Settings - General Tab ... 3685
To set permissions for changing the LDA: ... 3686
To enable Faculty Management Integration: ... 3688
Academic Records Settings - Hold Codes Tab ... 3690
To set up a hold codes: ... 3690
Academic Records Settings - LMS Configuration Tab ... 3692
To configure the LMS Data Exchange: ... 3692
To configure the LMS Vendor: ... 3693
Academic Records Settings - OMR Scanning Tab ... 3696
To enter the Scantron system settings: ... 3696
Academic Records Settings - SAP Tab ... 3699
To configure SAP settings: ... 3699
Academic Records Settings - Settings Tab ... 3701
To set these parameters: ... 3701
Academic Records Settings - Transcripts Tab ... 3706
To configure transcripts: ... 3706
Setup > Distance Education ... 3709
Distance Education Setup - Instructors Tab ... 3710
To set up an instructor for distance education procedures: ... 3710
Distance Education Setup - Program Rates Tab ... 3711
To set up a pay rate schedule at the program level: ... 3711
Distance Education Setup - Course Rates Tab ... 3712
To set up a pay rate schedule at the course level: ... 3712
Distance Education Setup - Hold Criteria Tab ... 3713
To designate a student group as a hold group: ... 3713
Setup > Career Services ... 3715
Career Services Settings - Settings Tab ... 3716
To configure career services settings: ... 3716
Career Services Settings - Placement Wizard Tab ... 3720
To configure the placement wizard: ... 3720
Career Services Settings - Hold Codes Tab ... 3722
To associate a hold action with a student group: ... 3722
Staff to Associate Employer with Other Campuses ... 3724
To allow a staff member this security right: ... 3724

Setup > Housing 3725
Housing Setup - General Tab 3726
To configure settings on the General tab: 3726
Housing Setup - Hold Codes Tab 3727
To associate a hold action with a student group: 3727
Setup > CampusVue Finance 3729
Journal Entry Group 3730
To set up Journal Entry Groups: 3730
To add Journal Entry Groups: 3731
To delete Journal Entry Groups: 3731
To clear Journal Entry Groups: 3731
Ledger Copy/Validate 3732
To copy GL Account setups configured in one fiscal year to another for a specific campus: 3732
Validation Report 3734
To correct errors in the General Ledger Link Setup: 3734
To correct errors in the Fund Sources GL Account Setup: 3734
To correct errors in the Subsidiary GL Account Setup: 3734
To run the validation report: 3735
Initial Configuration of CampusNexus Finance, HR & Payroll 3736
To configure CampusNexus Student for integration with CampusNexus Finance, HR & Payroll: 3736
Setup > Report Maintenance 3737
To prepare a report for customization: 3737
To add a custom report to the Report Wizard: 3739
Setup > Web Interface (Legacy) 3744
Web Interface - Layout Tab 3745
To specify the layout of your website: 3745
Web Interface - Student Access Tab 3747
To configure student access for your website: 3747
Web Interface - Staff Access Tab 3748
To configure staff access for your website: 3748
Web Interface - Messages Tab 3749
To create a home page message for your website: 3749
Web Interface - Web Server Tab 3750
To designate the location of your web folder and build your web pages: 3750
Web Interface Concepts 3752
Web Interface Security 3752

Home Page 3753
Inquiry Form 3753
Staff Services 3753
Student Services 3753
Employer Services 3753
Internet Information Server (IIS) 3754
To initialize IIS for use with CampusNexus Student: 3754
Important Operations Note 3754
Home Page 3755
Global Access 3755
Login 3755
Logout 3755
Welcome Page 3756
Inquiry Form 3756
Student Login 3756
Staff Login 3757
Employer Login 3757
Web Inquiries 3759
Processing Electronic Leads 3760
Student Home Page 3761
Student Services Menu 3761
Financial Information Menu 3761
Registration Menu 3762
My Information 3763
Ledger Card 3764
Class Registration 3765
List of Student's Required Courses 3765
Registration Summary 3769
Class Schedule 3771
Degree Audit 3772
Previous Grades 3775
Online Payment 3776
Staff Home Page 3777
Calendar 3778
Edit Activity 3779
Close Activity 3779

Contact Manager ... 3780
Add Activity ... 3780
Edit Activity ... 3781
Close Activity ... 3782
Add New Lead ... 3783
Staff Attendance Posting ... 3785
Class Rosters ... 3787
Class Schedule ... 3788
Final Grade Posting ... 3789
Student Information ... 3791
Student History ... 3791
Student Documents ... 3792
Student Search ... 3794
Lesson Posting ... 3796
Employer Home Page ... 3798
Employer Sign Up ... 3799
Employer Jobs ... 3800
Add or Edit Job ... 3800
Delete Job ... 3801
Setup > Data Dictionary ... 3803
To customize the data dictionary: ... 3803
SQL Data Types ... 3806
Setup > School Defined Fields ... 3809
School Defined Fields > Student ... 3810
To add a school-defined field: ... 3810
School Defined Fields > Entity ... 3814
To configure a school-defined field for the course entity: ... 3814
Setup > Required Fields ... 3816
To set up required fields on a form: ... 3816
Setup > Field Level Security ... 3818
To configure field level security: ... 3818
Field level security for Student Master form ... 3819
Field level security for Student Ledger Card form ... 3820
Field level security for Financial Aid Academic Year form ... 3821
Field level security for Collections form ... 3822
Setup > Student Pace Evaluation Settings ... 3823

To configure student pace evaluation settings: 3823
Setup > Executive Summary Report 3830
To customize the Executive Summary Report: 3830
Help Menu 3831
Contents 3831
Tabs 3831
Shortcut Menus 3832
Printing Topics 3832
Custom Help 3833
Help on the Web 3833
About 3833

Welcome

CampusNexus® Student is a fully unified academic and administrative platform designed for today's service-oriented institutions. Administrators, faculty, and advisors leverage a centralized database and automated workflows to speed and improve services to students at every stage and touchpoint of their academic experience. Business and executive officers gain a 360 degree view of campus operations for strategic analysis, enhanced recruiting and retention, and accurate, real-time reporting.

Note: The CampusNexus Student product interface previously called the "desktop client" is now referred to as the "legacy interface". The product interface previously called the "web client" is now the standard, default product interface and is no longer prefixed with "web client".

This help system is organized based on the menu structure of the CampusNexus Student application. To find information within the help system, navigate through the **Contents** pane or use the **Search** function.

Help is updated with every major or minor release of CampusNexus Student. See What's New.

To send comments about a help topic, click the **Feedback** button at the top of the topic pane and send an email. Your comments will be used to improve the Help system.

To view the HTML5 version of this Help system, navigate to http://www.mycampusinsight.com (logon required), select **Documentation Center** > **Help Systems** > **Choose Product** > **CampusNexus Student**, and click the appropriate link.

CampusNexus Student (Legacy Interface) Help Guide

What's New

Version 21.2

- Campus Information - Options Tab - added options to select 'Enable Automatic Grade Level Promotion' and/or 'Additional Academic Year Loan Packaging'.
- Field Descriptions: Standard Packaging Form - relabeled columns 'Gross Amount Exp for AY' and 'Net Amount Exp for AY'
- Added Loan Information form with tabs for Informed Borrower status and Subsidized Usage information.

Note: The CampusNexus Student product interface previously called the "desktop client" is now referred to as the "legacy interface". The product interface previously called the "web client" is now the standard, default product interface and is no longer prefixed with "web client".

Campus Management Corp. is now Anthology Inc.

Version 21.1

2020 CIP Code Update

The National Center for Education Statistics (NCES) published the final CIP 2020 on their site on July 1, 2019. In accordance with the needs related to managing 2020 CIP Codes, as outlined by the Department of Education at the December 2019 Federal Student Aid conference, CampusNexus Student now supports the ability to assign and save both a 2010 and 2020 CIP code to a program, program version, and area of study. The ability to configure 2010 CIP codes has not been impacted and continues to function as before, only the label of fields previously labeled as "CIP Code" have been updated to "2010 CIP Code." A new 2020 CIP Code field has been added.

Additionally, users will be able to see which 2010 and 2020 CIP code is associated with a student's program version when reviewing the Enrollment Information and Financial Aid Packaging forms.

More details regarding 2020 CIP Codes can be found on NCES at https://nces.ed.gov/ipeds/cipcode/resources.aspx?y=56

More details regarding changes to Regulatory processes to report 2020 CIP Codes to NSLDS and COD can be found in Regulatory Help.

The following forms are updated to display both the 2010 and 2020 CIP Codes:

- Setup - Academic Records Lists [Areas of Study]
- Setup - Academic Records Lists [Programs]
- Associate CIP Code with Area of Study or Program
- Programs > Program Versions
- Enrollment Information
- Financial Aid Packaging

College Finance Plan

The Financial Aid Shopping Sheet is renamed "College Finance Plan". New options are added under:

- Tools > Financial Aid
- Daily > Financial Aid > Print/View College Finance Plan

For more information, see Regulatory Help.

Informed Borrowing Requirement

The Direct Loan - Informed Borrowing Response (Award Year 2020 and later) message class (CRIByyOP) is added to the Export and Import File Types.

For more information, see COD Updates in Regulatory Help.

90-10 Report by Revenue Source

The purpose of the 90-10 calculation is to determine the percentage of revenue received from Federal Student Aid (FSA) funds. New options are added under 90-10 Reports by Revenue Source.

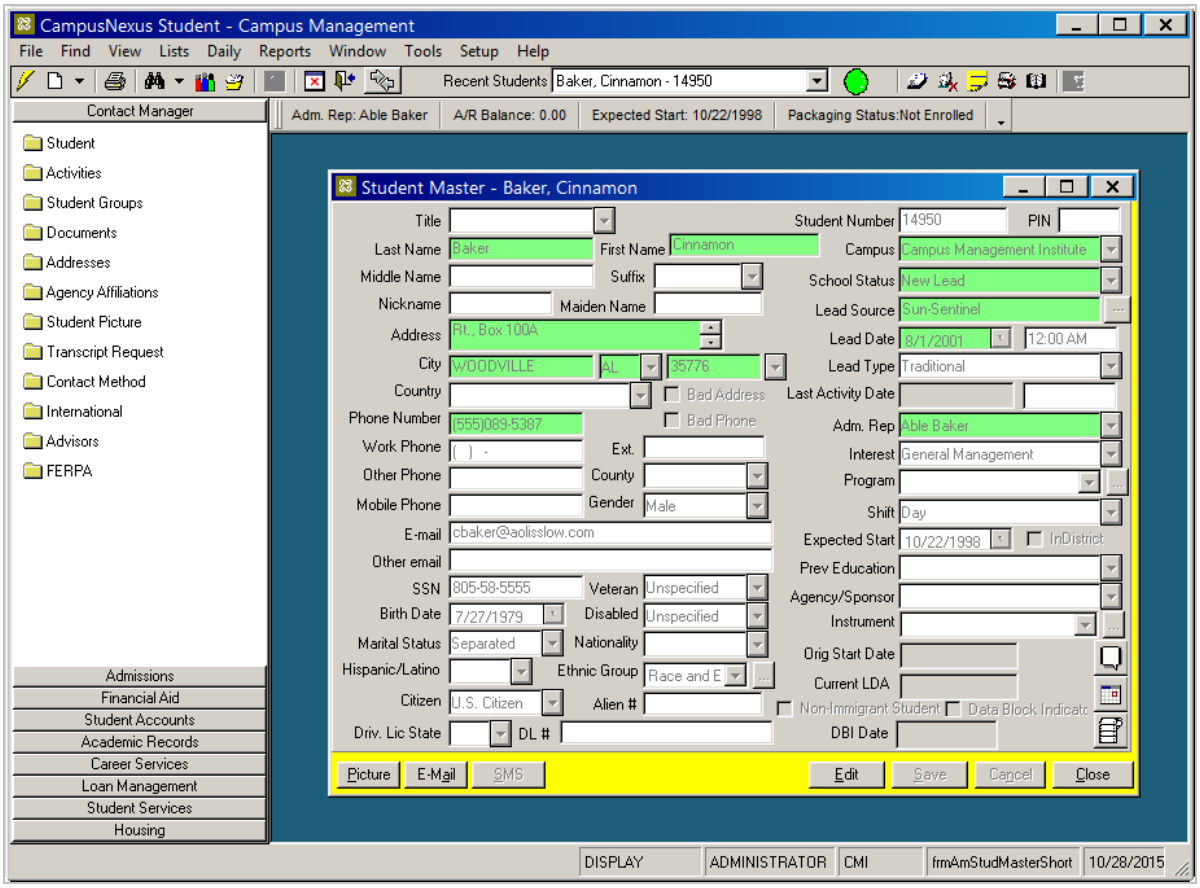
Updated Help Content

Status Codes - Status Codes Tab: added status definitions and Status Hierarchy.

Exploring the User Interface

A quick tour of the user interface, together with links to descriptions of frequently used features and other useful information, serves as a practical introduction to CampusNexus Student.

When you access CampusNexus Student, the main window is displayed. You have complete control over the color scheme used on your computer. Your pattern of colors for the features of the window may be different. A difference in color scheme or dimensions does not affect the functionality of the objects in the window.



Main Window at a Glance

Title Bar. At the top of the CampusNexus Student window is the Title Bar. On the Title Bar, from left to right you find the CampusNexus Student icon, the name of the program, and the name of your corporation, company, or institution. To the far right of the Title Bar are the typical control buttons for minimizing or maximizing the window and for quitting (exiting) the program.

- Click the CampusNexus Student icon at the far left end of the Title Bar to open a menu of controls for the main window. You can restore, move, resize, minimize, maximize, and close the main window. Double-click this icon to close the program, or press the key combination **Alt+F4** to close the program. When you attempt to close the program by any method, a dialog box is displayed asking you to confirm your intention to close it.
- Also on the Title Bar is the name of the program and the name of your corporation, company, or institution. This name can be edited by your system administrator in the **System** dialog box that is reached from the **Setup** menu.
- At the far right of the Title Bar are the controls for minimizing and maximizing the CampusNexus Student window

and for closing the program. Click one of these buttons to start the desired action.

- If you have reduced the size of the CampusNexus Student window, you can drag the window around on your desktop by placing your mouse pointer on the Title Bar and holding down the left mouse button. Move the reduced window to any place on the desktop and release the mouse button.

  Refer to your Microsoft Windows documentation for general instructions on resizing and other procedures associated with managing your Windows desktop.

Menu Bar. Below the Title Bar is the Menu Bar. All functions in CampusNexus Student can be accessed from the Menu Bar.

Toolbar. Under the Menu Bar is the Toolbar. It contains icons that lead you directly to specific tasks. This bar contains tools that make it easier for you to initiate certain functions in the Contact Manager module. Also on this bar is the Recent Students list box. As you work with student records, CampusNexus Student keeps the most recently accessed records handy so that you can go back to them quickly.

Student Bar. On the left side of the main window is the Student Bar. It provides access to many student-related functions. All functions on the Student Bar can also be accessed from the **View** menu on the Menu Bar. To free up additional space in your work area, you may choose to "autohide" the Student Bar.

User Toolbar. Below the toolbar is the User Toolbar. It provides access to forms that you use most often. This differs from the Student Bar in that it gives you access to the various forms that are within each of the Student Bar functions.

Work Area. The large area to the right of the Student Bar is referred to as the Work Area (a.k.a. desktop). Here, the program displays forms for viewing and editing the data that you use in your system-related work. You can have many forms open in the work area simultaneously. At any time, you can use the Window menu on the menu bar to see a list of currently open windows (forms). Switch to another window by selecting it on the Window menu. Alternatively, you can click anywhere in a window to make it active.

CampusNexus Student opens some forms in a modal window. This means that you must work with the form and close it before you can go to any other form (window).

Note the distinction between an **open window** and an **active window**. Several windows can be open at the same time, but only the active window has focus at any given time.

If you double-click the surface of the work area with the left mouse button, you will open the student search form.

If you right-click the surface of the work area, you will see a listing of very useful tools, which are described elsewhere in this Help system. Click an item on the list to view the related Help topic:

- Find Student
- Find Employer
- Find Staff
- Student Groups
- Employer Groups
- New Student
- Quick Lead
- Contact Manager
- Session Defaults
- Set Background Color

Status Bar. At the bottom of the main window is the Status Bar. Helpful hints, messages, and other basic information is displayed at various times on the Status Bar. It often tells you what you need to enter in a data entry field. It tells you what campus you are working with, the current date, and the name of the active form. It indicates the mode in which you are operating. At any given time, you will be in **DISPLAY** mode, **ADD** mode, or **EDIT** mode.

For more information, see Common Tasks. Also refer to the System Setup Overview.

Social Security Number (SSN) Handling

Access to a student's Social Security number (SSN) poses problems that can affect security administrators, systems administrators, compliance officers, students, financial aid administrators, admissions officers, and registrars. As a result, organizations that are required by state and regulatory bodies to adhere to strict security protocols may fall out of compliance, administrators maintain security groups that prevent access to key areas of the system, and students run the risk of having their identity used fraudulently.

CampusNexus Student prevents users from viewing a student's SSN, in full or in part, unless they have been given explicit permission to do so by a system administrator.

Overall, SSN access control in CampusNexus Student is achieved using a three-pronged approach:

- A staff-level configuration option – **Allow Access to SSN on UI**. This option, selected by default, enables system administrators to grant or prevent SSN viewing access to individual staff members for specific forms, as well as on the setup templates for Instructor Groups and Admissions Rep Groups.
  Note: This option is available in addition to the existing functionality to **Allow reporting access to SSN**.
- Replacing the SSN with the Student Number – This is not configuration-driven, but rather a change made directly on the forms in those cases where the student can be uniquely identified by Student Number.
- Hiding the SSN completely – The system hides the SSN on specific forms where a unique identifier is not needed (e.g., Career Services and International forms).

Granting/Preventing SSN Viewing Access for Staff Members

The staff-level configuration option **Allow Access to SSN on UI** enables system administrators to grant or prevent SSN viewing access to individual staff members for specific forms in CampusNexus Student. Like all other changes made through Staff Maintenance, the granting/removal of SSN access permissions is audited.

To grant or prevent SSN viewing access for a Staff Member:

1. Navigate to **Setup** > **Staff**. The Staff Maintenance form is displayed.
2. Click the **Staff Members** tab.
3. Select the name of the staff member whose SSN viewing access is to be granted/prevented; click **Edit**.
4. When the Staff Information form is displayed, select the **User Info** tab.
5. On the General subtab, select the **Allow access to SSN on UI** check box to grant SSN viewing access to the selected Staff Member. To prevent this Staff Member from viewing the SSN, clear this check box.
6. Staff Information form: Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.
7. Staff Maintenance form: Click **Close** to close the form.

Note: The Student Master is not impacted by the configuration option **Allow Access to SSN on UI**. On the Student Master, viewing access to SSN is based on the Field Level Security, not on this configuration option.

Granting/Preventing SSN Viewing Access for Instructor Groups and Admissions Rep Groups

The staff-level configuration option **Allow Access to SSN on UI** enables system administrators to grant or prevent SSN viewing access on the setup templates for Instructor Groups and Admissions Rep Groups. Like all other changes made through Staff Maintenance, granting/removal of SSN access permissions is audited.

To grant or prevent SSN viewing access for Instructor Groups or Admissions Rep Groups:

1. Navigate to **Setup** > **Staff**. The Staff Maintenance form is displayed.
2. Click the **Staff Groups** tab.
3. Click **Add** to define a new Staff Group (see Adding a Staff Group for details)
   or
   Select the name of the Staff Group whose SSN viewing access is to be granted/prevented; click **Edit**.
4. Complete the **Staff Group** form as applicable, including the designation of the group as an **Instructor Group** or **Admissions Rep Group**. When either of these options is selected, the Setup Template button becomes available; click **Setup Template**.
5. When the Setup Template form is displayed, select the **User Info** tab.
6. On the General subtab, select the **Allow access to SSN on UI** check box to grant SSN viewing access to the selected Staff Group. To prevent this Staff Group from viewing the SSN, clear this check box.
7. Setup Template form: Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.
8. Staff Group form: Click **Close** to close the form.

Note: The Student Master is not impacted by the configuration option **Allow Access to SSN on UI**. On the Student Master, viewing access to SSN is based on the Field Level Security, not on this configuration option.

Forms Containing SSN that are Configuration-driven

A number of forms used in CampusNexus Student involve the display of Social Security numbers (SSN) and are set up to be configuration-driven. Staff Members are able to access and view the SSN on these forms (or not) depending on the permissions assigned to them by the system administrator using the staff-level configuration option **Allow Access to SSN on UI**.

If the **Allow Access to SSN on UI** option is enabled for a Staff Member (check box is selected), the Staff Member can view the student's SSN on these forms. If the option is disabled (check box cleared), the text area is grayed out where the SSN normally appears, or the phrase 'SSN Blocked' is displayed in place of the SSN.

Configuration-driven Forms Containing SSN

Form Title	Navigation Path
Process Online Applicants	Daily > Admission > Process Online Applicants
ISIR Matching	Daily > Financial Aid > ISIR Matching
Student Collections	View > Student Accounts > Collections
Customize User Toolbar	View > Customize User Toolbar
Search	Find > Student
FAFSA	View > Financial Aid > FAFSA

Forms on which SSN is Replaced with Student Number

In cases where a student can be uniquely identified by Student Number rather than by Social Security number (SSN), CampusNexus Student makes this replacement in the corresponding forms. Unlike configuration-driven changes, these are direct changes in the form itself.

Forms Where SSN is Replaced with Student Number

Form Title	Navigation Path
Academic Records - Process Transfers	Daily > Academic Records > Process Queued Transfers
Registration	Daily > Academic Records > Registration
Lease History, Room/Roommates Info	View > Housing > Application/Lease
Student Accounts - Billing	Daily > Student Accounts > Registration Billing
Edit/Cancel Scheduled Refunds	Daily > Student Accounts > Edit/Cancel Scheduled Refunds
Contact Manager	Daily > Contact Manager > Contact Manager
Student List Customization	Daily > Contact Manager > Contact Manager > Students (tab)
Review/Post Pending Transactions	Daily > Student Accounts > QuickTouch POS Link > Review/Post Pending Transactions
Process Tuition Discounts	Daily > Student Accounts > Process Tuition Discounts
Batch Post Work Study	Daily > Financial Aid > FA Batch Posting Work Study
Update Disbursement Information	Tools > Financial Aid > Update Disbursement Information
Process Pending Charges/Adjustments	Daily > Student Accounts > Process Pending Charges/Adjustments
Financial Aid - Approve Disbursements	Daily > Financial Aid > Approve Disbursements to Pay

Forms on which SSN is Hidden from View

Some forms used in CampusNexus Student do not require a unique student identifier, so the student's Social Security number (SSN) can be completely hidden in these cases.

Forms Where SSN is Hidden

Form Title	Navigation Path
International - <Last Name, First Name>	View > Contact Manager > International
Placements: <Last Name, First Name>	View > Career Services > Placements

Common Tasks

This is a list of common tasks in CampusNexus Student. The tasks are organized by module.

- General (Multimodule) Tasks
- Contact Manager
- Admissions
- Financial Aid
- Student Accounts
- Academic Records
- Distance Education
- Placement
- Housing
- Bookstore
- Setup
- Get More Help

General (Multimodule) Tasks

How do I exit?

How do I use the Help system?

How do I quickly enter a new lead?

How do I add a new student master?

How do I edit a lead or student master record?

How do I find a student master record?

How do I see other student addresses?

How do I print a student address label?

How do I delete a lead or student master record?

How do I print a report?

How do I save a group of students?

How do I load a group of students?

How do I refresh the current form on my screen?

How do I change my session default settings? (Campus, Term, FA Year)

How do I add a new list item?

How do I edit a list item?

How do I delete a list item?

How do I disable a list item?

How do I enable a list item?

How do I print reports from a list?

How do I print the current screen image?

How do I show or hide the Student Bar?

How do I see the Print Setup for my system?

How do I choose printers for reports, receipts, and labels?

How do I enter school-defined data for a student?

How do I add a new document to track for a student?

How do I edit a document tracking record?

How do I remove a tracked document for a student?

Contact Manager

How do I see a list of my active leads or students?

How do I see my pending activities?

How do I add or edit an activity for a student?

How do I close an activity for a student?

How do I add a follow-up activity?

How do I see all the activities for a student?

How do I see my messages?

How do I send a message?

How do I mark a message as read?

How do I reply to a message?

How do I add an alternative address for a student?

How do I edit an alternative address for a student?

How do I remove an alternative address for a student?

How do I print letters?

How do I create a new form letter?

How do I add a new automatic activity to the Scheduler?

How do I edit an automatic activity in the Scheduler?

How do I delete an automatic activity from the Scheduler?

How do I print a list of staff members?

How do I report a police incident regarding a student?

How do I find out if a contact is on a Do Not Call list?

Admissions

How do I add a new lead?

How do I change the status of a lead or student?

How do I enroll a student?

How do I add an entrance test result record for a student?

How do I see all the leads assigned to me?

How do I add an Admissions expense?

How do I edit an Admissions expense?

How do I delete an Admissions expense?

How do I print a list of Admissions expenses?

How do I reassign leads to another rep?

Financial Aid

How do I set up Fund Sources for FA?

How do I set up Packaging Methods for FA?

How do I set up Academic Years for FA?

How do I set up Cost of Attendance Budgets for FA?

How do I set up the FA General Ledger?

How do I package a student for FA?

How do I add or edit a FAFSA record? See Regulatory Help.

How do I send FAFSAs to the Central Processing System (CPS)? See Regulatory Help.

How do I package a student for work study funds?

How do I package a student for a direct loan?

How do I post work study disbursements?

How do I approve batches of packaged financial aid?

How do I import ISIRs?

How do I match imported ISIRs with my students?

How do I print an ISIR?

How do I work with ISIRs returned to our office?

How do I make ISIR corrections?

How do I work with SSCR processing?

How do I export Clearinghouse data?

How do I export data to my FA servicer (Global)?

How do I find out about Return of Title IV Funds?

Student Accounts

How do I see a student's ledger card?

How do I enter a charge transaction?

How do I enter a payment transaction?

How do I apply a payment to outstanding charges?

How do I enter a charge adjustment transaction?

How do I enter a payment adjustment transaction?

How do I set up a student payment schedule?

How do I print a student's account statement?

How do I see a list of my accounts receivable?

How do I set up a transaction code?

How do I set up a bank code and its related accounts?

How do I set up a billing method?

How do I assign a billing method to a program?

How do I find out about Return of Title IV Funds?

Academic Records

How do I set up a new program?

How do I set up a new program version?

How do I build a course list for a program version?

How do I set up a course?

How do I set up Dependent and Parent courses?

How do I register students in a class section?

How do I set up lessons and exams for a class section?

How do I receive distance education lessons?

How do I track lessons and exams for a student?

How do I grant a course extension?

How do I enter fees for a student enrollment?

How do I add a class section to a student's schedule?

How do I remove a class section from a student's schedule?

How do I drop a student from a class section?

How do I post final grades for a selected student?

How do I change a student's status?

How do I post attendance for a class section?

How do I post final grades for a class section?

How do I set up a SCANTRON™ system for attendance and grades?

How do I set up a Satisfactory Academic Progress table?

How do I process instructor payments?

How do I print a Student Degree Evaluation Report?

Distance Education

How do I track lessons and exams for an individual student?

How do I enter a batch of received lessons?

How do I enter a batch of graded lessons?

How do I process payments to instructors for courses, lessons, and exams they grade?

How do I pay an instructor for course revisions?

How do I process payments to instructors for course revisions (rewrites)?

How do I set up instructor pay rates for programs?

How do I set up instructor pay rates for courses?

Placement

How do I edit the Placement settings?

How do I set up a Placement Master record for a student?

How do I enter Placement Exit Interview results?

How do I attribute job skills to a student?

How do I enter a new employer?

How do I enter a new job opportunity?

How do I record a job placement?

How do I see a list of available jobs?

How do I see an employer's placement history?

How do I see a student's placement history?

How do I add an employer activity?

Housing

How do I view housing applications?

How do I work with housing applications?

How do I work with housing leases?

How do I move a student from one room to another?

How do I assign the cost of a housing related service to a student for subsequent billing?

How do I post housing deposits?

Bookstore

How do I enter new inventory items?

Setup

How do I edit theCampusNexus Student system settings?

How do I delete a campus record?

How do I add, edit, or delete a campus group?

How do I design a quick lead form?

How do I design a student ID number?

How do I add a new staff member?

How do I search for a staff member?

How do I edit a staff member?

How do I deactivate a staff member?

How do I delete a staff member?

How do I add a staff group?

How do I delete a staff group?

How do I set up security for my system?

How do I add a student status code?

How do I edit a student status code?

How do I delete a student status code?

How do I edit the student status change rules?

How do I assign background colors to student statuses?

How do I edit the Academic Records settings?

How do I edit the Placement settings?

How do I set up a Distance Education instructor?

How do I set up program rates for distance education?

How do I set up course rates for distance education?

How do I set up a label printer for distance education?

How do I designate required data fields on a form?

How do I see the data dictionary?

How do I change the form captions?

How do I add a school-defined field?

How do I set up field level security?

How do I set up our school's Web Interface?

How do I set up a link to the Great Plains Accounting system?

How do I set up a link to the accounting system?

Get More Help

How do I access the Help system?

How do I print one or more Help topics?

How do I access our school's private Help system?

How do I access the website?

How do I send an e-mail request for support?

Select City ZIP Code

ZIP (Zone Improvement Plan) codes are used in addresses throughout CampusNexus Student. A ZIP code can cover multiple cities. The U.S. Postal Service has designated a "default" place name for each ZIP code. However, other cities may also be covered by the same ZIP code.

The ZIP code database in CampusNexus Student includes alternative ZIP codes, cities, and an indicator marking the primary city. When entering a ZIP code into any form in CampusNexus Student, if the ZIP code covers more than one city, a drop-down list of cities is displayed and you can select the correct city from the list. The primary city is selected as the default, but you can select any city from the list. If only one city matches the ZIP code, that city is used without displaying a list of cities.

As an example of this scenario, for the ZIP code 33067, the default city is Pompano Beach, FL. However, Coral Springs, FL and Parkland, FL are also covered by this ZIP code. CampusNexus Student displays a list of the three cities, with the default selection being Pompano Beach.

Incoming Phone Call Activity

You can keep a record of incoming telephone calls related to students or employers. First you must set up an incoming phone call activity under Lists > Contact Manager > Activities.

Next, you must select the student or employer who called in and record your notes about the call.

To record an incoming phone call activity for a selected student or employer:

1. **Find** the student (or employer) for whom you want to add the incoming phone call activity. Or, select a student from the **Recent Students** list box at the top of the CampusNexus Student work area.
2. Select View > Contact Manager > Activities. The Contact History form for the selected student is displayed.
3. Click **Add Activity**. A new Activity form is displayed.
4. Check the **Assign To** box to be sure the person who received the incoming call is showing.
5. Select the incoming phone call **Activity** from the list. (If you don't see an activity that matches what you want, new activities can be added by going to the Contact Manager option under the Lists menu. See the Lists > Contact Manager > Activities topic for more information.)
6. When you select an activity, the description of the activity will be inserted in the **Subject** box as a default. You can change the subject to anything you wish.
7. If you are recording the phone call after it has been completed, the **Status** will probably be Closed or Follow Up.
8. Select options from the other list boxes as necessary.
9. Enter **Comments** about the nature of the call.
10. Click **Save** to save your changes. If the date of the phone call is not today, you will get a warning message. Click **Yes** to continue.
11. You can click **Cancel** if you change your mind about adding the activity before you save it.

Outgoing Phone Call Activity

You can assign outgoing phone calls or keep a record of outgoing telephone calls related to students or employers. First you must set up an outgoing phone call activity under Lists > Contact Manager > Activities.

Next, you must select the student or employer to be called (or that was called) and record your notes about the call.

To assign an outgoing call or record an outgoing phone call activity for a selected student or employer:

1. **Find** the student (or employer) for whom you want to add the outgoing phone call activity. Or, select a student from the **Recent Students** list box at the top of the CampusNexus Student work area.
2. Select **View > Contact Manager > Activities**. The **Contact History** form for the selected student is displayed.
3. Click **Add Activity**. A new Activity form is displayed.
4. Check the **Assign To** box to be sure the person who will make the outgoing call is listed.
5. Select the outgoing phone call **Activity** from the list. (If you don't see an activity that matches what you want, new activities can be added by going to the Contact Manager option under the Lists menu. See the Lists > Contact Manager > Activities topic for more information.)
6. When you select an activity, the description of the activity is inserted in the **Subject** box as a default. You can change the subject to anything you want.
7. If you are recording the phone call after it has been completed, the **Status** will probably be Closed or Follow Up. If you are setting up a phone call that will be made later, the **Status** will be Pending.
8. Select options from the other list boxes as necessary.
9. Enter **Comments** about the nature of the call.
10. Click **Save** to save your changes. If the date of the phone call is not today, you will get a warning message. Click **Yes** to continue.
11. You can click **Cancel** if you change your mind about adding the activity before you save it.

Letter Activity

Letter activities are set up to send form letters to one or more students. The form letters can be set up to include attachments, such as catalogs, brochures, forms, and so on, that will be picked from the shelf and sent along with the form letter. The form letters can also be set up with "linked" letters or documents, such as mailing labels, that will be printed at the same time as the form letter. The attached and linked documents are specified at the time the letter activity is defined. See also Print Award Letters in a Batch Mode.

After the form letter has been defined, you can relate it to a Student or Employer through the Activities form.

To match a letter activity with a selected student:

1. **Find** the student for whom you want to add a letter activity. Or, select a student from the **Recent Students** list box at the top of the CampusNexus Student work area.
2. Select **View > Contact Manager > Activities**. The Contact History form for the selected student is displayed in the work area.
3. Click **Add Activity**, or select an existing activity and click **Edit Activity** to modify the activity. The Activity form is displayed.
4. Check the **Assign To** box to be sure that the person responsible for the letter activity is showing. If necessary, select the appropriate person. (Only the persons to whom you can assign the activity will appear in this list.)
5. Select a letter **Activity** from the list. (If you don't see an activity that matches what you want, new activities can be added by going to the Contact Manager option under the Lists menu.)
6. When you select an activity, the same text will be inserted in the **Subject** box as a default. You can change the subject to anything you want.
7. Check the **Student box** to be sure the correct student is showing. If not, click to find the correct student.
8. Select options from the other list boxes as necessary.
9. Enter any additional **Comments** concerning the activity. These comments do not appear in the letter.
10. Click **Save** to save your changes.
11. If there are **Attachments** to be sent with the form letter, CampusNexus Student will open the **Documents to Send Student** form.
12. Enter the quantity of each attachment that is to be sent with the form letter. If you like, click **Clear** to set the quantity column for all attachments to zero, then enter a quantity for the ones you want to attach. You can select only the ones you want to include by entering a quantity to send next to the description.
13. Click **Save** to save your selection of documents to send with the letter and close the Documents to Send form. The letter activity form will also close.
14. Documents to Send form: Click **Close** to close the form.
15. Letter Activity form: Click **Close** to close the form.

Daily Contact Manager Activities

You can see all the letter activities assigned to you in the Contact Manager form. Here, you can edit or close the letter activity.

Daily Contact Manager Letters

See Print Letters to edit, clear, and print the letters that are showing on your activities list. See also Print Employer Letters, Print Letter Overview or Employer Letters Overview.

Note: When you edit or print the selected letter from the Print Letters and Print Employer Letters form, you are affecting all the queued up letters, not just those that appear on your own Contact Manager Activities list.

Mail Merge Codes

Mail merge codes are used to merge data from CampusNexus Student into letters, e-mails, labels, and other documents created in Microsoft Word. Select the codes from a drop-down list while composing or editing your document. When the time comes to print the document, Word extracts the data from the CampusNexus Student databases and substitutes it where you have placed the merge codes.

The data fields can range from a simple name field to a complex data table of financial aid data. Some codes, such as StudentFirstName, result in data from a single field in the database. Others, such as StudentCourseSchedule, result in data being listed from several records.

School-defined fields automatically appear on the list of mail merge codes. You will recognize them by the suffix "_SDF" that is appended to each code.

For information regarding mail merge functionality from the **Reports** menu, see the topic Report Viewer Controls.

For information on using mail merge features from the **Print Letters** screen in CampusNexus Student, see the topic Edit Letter.

Available Merge Field Codes for Letter Activities

The table below contains an alphabetic listing of merge field codes available in CampusNexus Student. It is intended to serve as an overview of the codes available to you through Microsoft Word when you compose or edit your document. When the time comes to print the document, Word extracts the corresponding data from the CampusNexus Student databases and substitutes it where you have placed the merge codes.

Note: While every effort has been made to present an exhaustive listing below, it is possible that there are differences between this list and the codes that you see in your current version of CampusNexus Student. In addition, please note that the set of codes presented to you by the Insert Merge Field function of Microsoft Word depend on the settings you have made in CampusNexus Student for the specific letter activity at hand.

For example, in the case of merge field codes of the groups beginning with <<Student**##**Advisor...>>, provisions have been made for codes wherein **##** represents modules AM, FA, SA, AD, CS, LM, and Other.

For special instructions regarding the use of the ledger merge field codes <<LedgerAmount>>, <<LedgerDate>>, and <<LedgerDescrip>>, please see the topic Using Ledger Merge Fields in Letter Activities.

Ledger Mail Merge Codes

«AdEnrollID»	«Enroll-mentNumber»	«Prerequisitecourse»	«Stu-dentATHLETICAd-visorZip»	«Stu-dentFAAd-visorEmailReplyTo»	«Stu-dentOTHERAd-visorEmailReplyTo»
«Attach-mentDetail»	«Enroll-mentNumber»	«ProgramVersion»	«StudentCity»	«Stu-dentFAAdvisorExtn»	«Stu-dentOTHERAd-visorExtn»
«Attach-mentSummary»	«Enroll-mentStartDate»	«Pro-gramVersionCode»	«Stu-dentCol-legeAddress»	«Stu-dentFAAd-visorFirstName»	«Stu-dentOTHERAd-visorFirstName»
«Benefits»	«Enroll-mentStartTerm»	«Pro-gramVer-sionDegreeType»	«StudentCountry»	«Stu-dentFAAd-visorLastName»	«Stu-dentOTHERAd-visorLastName»
«BillingAddress»	«Enroll-mentStatus»	«Pro-gramVersionDesc»	«Stu-dentCourseCatalog»	«Stu-dentFAAd-visorOfficeNumber»	«Stu-dentOTHERAd-visorOfficeNumber»
«BillingCity»	«Expec-tedStartDate»	«RemittanceAddress»	«Stu-dentCourseRe-sources»	«Stu-dentFAAd-visorPhoneNumber»	«Stu-dentOTHERAd-visorPhoneNumber»
«BillingCountry»	«FailedSAPReason»	«RemittanceCity»	«Stu-dentCourseSched-ule»	«Stu-dentFAAdvisorState»	«Stu-dentOTHERAd-visorState»
«BillingFirstNam-e»	«HoursPerWeek»	«RemittanceCountry»	«Stu-dentCSAd-visorAddress»	«Stu-dentFAAdvisorZip»	«Stu-dentOTHERAd-visorZip»
«BillingLastNam-e»	«HousingBuilding»	«RemittanceState»	«Stu-dentCSAdvisorCity»	«Stu-dentFeeScheduleInfo»	«Stu-dentOtherEmail»
«BillingState»	«Hous-ingBuild-ingAddress»	«RemittanceZip»	«Stu-dentCSAd-visorEmail»	«StudentFirstName»	«Stu-dentOtherPhone»
«BillingZip»	«Hous-ingBuildingPhone»	«SchoolStatus»	«Stu-dentCSAd-visorEmailReplyTo»	«StudentGender»	«Stu-dentOver-dueDocument»
«Cam-pusAddress»	«HousingRoom»	«SchoolStatusDate»	«Stu-dentCSAdvisorExtn»	«Stu-dentHighSchoolAd-dress»	«Stu-dentPhoneNumber»
«Cam-pusBusi-nessOffice»	«Hous-ingRoomMates»	«SemesterHours»	«Stu-dentCSAd-visorFirstName»	«Stu-dentHighSchoolName»	«StudentPIN»
«CampusCity»	«Instruc-tionalWeek»	«Shift»	«Stu-dentCSAd-visorLastName»	«StudentHomePhone»	«StudentProgram»
«Cam-pusCountry»	«JobComments»	«ShiftDesc»	«Stu-dentCSAd-visorOfficeNumber»	«StudentID»	«Stu-dentProgramCode»
«Cam-pusDir-ect-orofAdmissions»	«JobLocation»	«StudentADAdvisor»	«Stu-dentCSAd-visorPhoneNumber»	«StudentInterest»	«Stu-dentSAAd-visorAddress»
«Cam-pusDir-ectorOfCareer»	«JobsClosed»	«Stu-dentADAd-visorAddress»	«Stu-dentCSAd-visorState»	«StudentLastName»	«Stu-dentSAAdvisorCity»
«Cam-pusDir-ect-orOfEducation»	«JobSkills»	«Stu-dentADAdvisorCity»	«Stu-dentCSAdvisorZip»	«StudentLeadDate»	«Stu-dentSAAd-visorEmail»
«Cam-pusDirectorofFA»	«JobsListed»	«Stu-dentADAdvisorEmail»	«Stu-dentCurrentAMRep»	«StudentLeadSource»	«Stu-dentSAAd-visorEmailReplyTo»
«CampusName»	«JobTitle»	«Stu-dentADAd-visorEmailReplyTo»	«Stu-dentCur-	«StudentLeadType»	«Stu-dentSAAdvisorExtn»
«Cam-pusOf-ficialSchoolNam-e»	«LedgerAmount»	«Stu-dentADAdvisorExtn»		«Stu-dentLMAd-visorAddress»	
«CampusPhone»	«LedgerDate»	«Stu-dentADAd-visorFirstName»		«Stu-dentLMAdvisorCity»	
«Cam-pusPresident»	«LedgerDescrip»	«Stu-dentADAd-visorLastName»		«Stu-dentLMAdvisorEmail»	
«CampusState»	«LOAEndDate»	«Stu-dentADAd-visorOfficeNumber»		«Stu-dentLMAd-visorEmailReplyTo»	
«CampusURL»	«LOAStartDate»	«Stu-dentADAd-visorPhoneNumber»			
«CampusZip»	«Miss-ingDocuments»	«Stu-dentADAdvisorState»			
	«Miss-ingDocu-mentsAD»				
	«Miss-ingDocumentsAL»				
	«Miss-				

«CashAmountPastDue» «ClockHours» «cumGPA» «EmployerAddress» «EmployerCity» «EmployerContactEmail» «EmployerContactFaxNumber» «EmployerContactFirstName» «EmployerContactLastName» «EmployerContactName» «EmployerContactPhoneNumber» «EmployerContactTitle» «EmployerCountry» «EmployerEmailAddress» «EmployerFaxNumber» «EmployerLocation» «EmployerName» «EmployerPhone» «EmployerState» «EmployerZip» «EnrollmentDescription» «EnrollmentExpectedEnd» «EnrollmentLDA»	ingDocumentsAM» «MissingDocumentsAMComments» «MissingDocumentsBS» «MissingDocumentsCM» «MissingDocumentsFA» «MissingDocumentsFAComments» «MissingDocumentsHO» «MissingDocumentsLM» «MissingDocumentsPL» «MissingDocumentsSA» «MissingDocumentsSY» «OrgPrimaryContactAddress» «OrgPrimaryContactName» «PermitDocCourse» «PermitDocExpDate» «PermitDocSections» «PermitDocStatus» «PermitDocTerms» «PermitDocument» «PermitType» «PlEmployerID»	«StudentADAdvisorZip» «StudentAddress1» «StudentADMINAdvisorAddress» «StudentADMINAdvisorCity» «StudentADMINAdvisorEmail» «StudentADMINAdvisorEmailReplyTo» «StudentADMINAdvisorExtn» «StudentADMINAdvisorFirstName» «StudentADMINAdvisorLastName» «StudentADMINAdvisorOfficeNumber» «StudentADMINAdvisorPhoneNumber» «StudentADMINAdvisorState» «StudentADMINAdvisorZip» «StudentARBalance» «StudentATHLETICAdvisorAddress» «StudentATHLETICAdvisorCity» «StudentATHLETICAdvisorEmail» «StudentATHLETICAdvisorEmailReplyTo» «StudentATHLETICAdvisorExtn»	rentAMRepAddress» «StudentCurrentAMRepCity» «StudentCurrentAMRepEmail» «StudentCurrentAMRepEmailReplyTo» «StudentCurrentAMRepExtn» «StudentCurrentAMRepFirstName» «StudentCurrentAMRepLastName» «StudentCurrentAMRepOfficeNumber» «StudentCurrentAMRepPhoneNumber» «StudentCurrentAMRepState» «StudentCurrentAMRepZip» «StudentCurrentEmployerAddress» «StudentCurrentEmployerContact» «StudentCurrentEmployerContactTitle» «StudentCurrentEmployerName» «StudentCur-	«StudentLMAdvisorExtn» «StudentLMAdvisorFirstName» «StudentLMAdvisorLastName» «StudentLMAdvisorOfficeNumber» «StudentLMAdvisorPhoneNumber» «StudentLMAdvisorState» «StudentLMAdvisorZip» «StudentMI» «StudentName» «StudentNIAdvisorAddress» «StudentNIAdvisorCity» «StudentNIAdvisorEmail» «StudentNIAdvisorEmailReplyTo» «StudentNIAdvisorExtn» «StudentNIAdvisorFirstName» «StudentNIAdvisorLastName» «StudentNIAdvisorOfficeNumber» «StudentNIAdvisorPhoneNumber» «StudentNIAdvisorState» «StudentNIAdvisorZip» «StudentNickName» «StudentOTHATHLETICAd-	«StudentSAAdvisorFirstName» «StudentSAAdvisorLastName» «StudentSAAdvisorOfficeNumber» «StudentSAAdvisorPhoneNumber» «StudentSAAdvisorState» «StudentSAAdvisorZip» «StudentSSN» «StudentState» «StudentTitle» «StudentWorkPhone» «StudentZip» «StudPrimaryContactAddress» «StudPrimaryContactName» «SyCampusID» «SyStudentID» «TermSequence»

		«StudentATHLETICAdvisorFirstName» «StudentATHLETICAdvisorOfficeNumber» «StudentATHLETICAdvisorPhoneNumber» «StudentATHLETICAdvisorState»	rentEmployerPhone» «StudentDOB» «StudentDropDate» «StudentEmail» «StudentExpectedBalance» «StudentExternSiteAddress» «StudentExternSiteContact» «StudentExternSiteContactTitle» «StudentExternSiteName» «StudentExternSitePhone» «StudentExternSiteSupervisor» «StudentExtraCurr» «StudentFAAdvisorAddress» «StudentFAAdvisorCity» «StudentFAAdvisorEmail»	visorLastName» «StudentOTHERAdvisorAddress» «StudentOTHERAdvisorCity» «StudentOTHERAdvisorEmail»	

Available Merge Field Codes for E-mail Activities

Below is a table listing all currently available merge field codes for e-mail activities within CampusNexus Student. The codes are arranged in groups, depending upon their function in the application.

Note: See also the section containing specific information on Job Notification E-mail Activities.

To quickly access the merge field codes available in the table below, use the following links to navigate the corresponding merge field groups:

Links for Merge Field Groups

Student Details	Permit Documents	Student Career Advisor
Enrollment Details	Remittance Address Details	Student Loan Management Advisor

Campus Details	Registration Details	Student International Advisor
Ledger Information	Student Admissions Rep	Other Advisors (Examples only)
Employer	Student Academic Advisor	Disb. Details
Housing Details	Student Accounts Advisor	User/School Defined Fields (SDF)
Missing Documents	Student Financial Aid Advisor	

Merge Field Groups and Codes

Merge Field Group	Merge Field Codes (E-mails)
Student Details	<studentname> <studentprogram> <studentlastname> <studentfirstname> <studentnickname> <studentstartterm> <studentleaddate> <studentid> <studentaddress> <studentaddr> <studentcity> <studentstate> <studentcountry> <studentzip> <studentphone> <studentotherphone> <studentpin> <studenthighschoolname> <studentexpectedstartdate> <studentschoolstatus> <enrollmentapplicantschoolstatus> <studentshift> <studentshiftdescription> <prerequisitecourse> <studentinterest> <studentcourseschedule> <cashamountpastdue> <studentcurrentemployername> <studentcurrentemployeraddress> <studentcurrentemployerphone> <studentcurrentemployercontact> <studentcurrentemployercontacttitle>

Merge Field Group	Merge Field Codes (E-mails)
Enrollment Details	<enrollmentexpectedend> <enrollmentstartterm> <enrollmentstartdate> <schoolstatus> <schoolstatusdate> <enrollmentstatus> <studentdropdate> <expectedstartdate> <programversiondesc> <loastartdate> <loaenddate> <hoursperweek> <failedsapreason>
Campus Details	<campusurl> <campusname> <campusaddress> <campusbusinessoffice> <campuscity> <campuscountry> <campusdirectorofadmissions> <campusdirectorofcareer> <campusdirectorofeducation> <campusdirectoroffa> <campusname> <campusofficialschoolname> <campusphone> <campuspresident> <campusstate> <campuszip>
Ledger Information Note: In the case of ledger information (date, amount, description), each e-mail activity that is added will show separate transaction details. There will be one e-mail activity for each payment posted, regardless of the time the job runs.	<ledgerdescrip> <ledgeramount> <ledgerdate>

Merge Field Group	Merge Field Codes (E-mails)
Employer	<employername> <employeraddress> <employercity> <employerstate> <employerzip> <employercountry> <employerphonenumber> <employerfaxnumber> <employeremailaddress> <employercode> <employerpin> <employercontacttitle> <employercontactfirstname> <employercontactlastname> <employercontactemailaddress> <employercontactphonenumber> <employercontactfaxnumber> <plemployerjobid> <pljobtitleid> <jobdescription> <days> <time> <jobcomment> <jobskills> <benefits> <joblocation> <location>
Housing Details	<housingroommates> <housingbuilding> <housingroom> <housingbuildingaddress> <housingbuildingphone>
Missing Documents	<missingdocumentam> <missingdocumentamcomments>

Merge Field Group	Merge Field Codes (E-mails)
Permit Documents	<PermitDocument> <PermitDocStatus> <PermitDocExpDate> <PermitDocCourse> <PermitDocTerms> <PermitDocSections> <PermitType>
Remittance Address Details	<remittanceaddress> <remittancecity> <remittancestate> <remittancezip> <remittancecountry>
Registration Details	<registrationpassword> <registrationterm> <registrationstartdate> <registrationenddate> <registrationstarttime>
Student Admissions Rep	<studentamreplastname> <studentamrepfirstname> <studentamrepaddress> <studentamrepcity> <studentamrepstate> <studentamrepzip> <studentamrepemail> <studentamrepemailreplyto> <studentamrepphone> <studentamrepofficenumber> <studentamrepextension>
Student Academic Advisor	<studentadadvisorlastname> <studentadadvisorfirstname> <studentadadvisoraddress> <studentadadvisorcity> <studentadadvisorstate> <studentadadvisorzip> <studentadadvisoremail> <studentadadvisoremailreplyto> <studentadadvisorphone> <studentadadvisorofficenumber> <studentadadvisorextension>

Merge Field Group	Merge Field Codes (E-mails)
Student Accounts Advisor	<studentsaadvisorlastname> <studentsaadvisorfirstname> <studentsaadvisoraddress> <studentsaadvisorcity> <studentsaadvisorstate> <studentsaadvisorzip> <studentsaadvisoremail> <studentsaadvisoremailreplyto> <studentsaadvisorphone> <studentsaadvisorofficenumber> <studentsaadvisorextension>
Student Financial Aid Advisor	<studentfaadvisorlastname> <studentfaadvisorfirstname> <studentfaadvisoraddress> <studentfaadvisorcity> <studentfaadvisorstate> <studentfaadvisorzip> <studentfaadvisoremail> <studentfaadvisoremailreplyto> <studentfaadvisorphone> <studentfaadvisorofficenumber> <studentfaadvisorextension>
Student Career Advisor	<studentcsadvisorlastname> <studentcsadvisorfirstname> <studentcsadvisoraddress> <studentcsadvisorcity> <studentcsadvisorstate> <studentcsadvisorzip> <studentcsadvisoremail> <studentcsadvisoremailreplyto> <studentcsadvisorphone> <studentcsadvisorofficenumber> <studentcsadvisorextension>

Merge Field Group	Merge Field Codes (E-mails)
Student Loan Management Advisor	<studentlmadvisorlastname> <studentlmadvisorfirstname> <studentlmadvisoraddress> <studentlmadvisorcity> <studentlmadvisorstate> <studentlmadvisorzip> <studentlmadvisoremail> <studentlmadvisoremailreplyto> <studentlmadvisorphone> <studentlmadvisorofficenumber> <studentlmadvisorextension>
Student International Advisor	<studentniadvisorlastname> <studentniadvisorfirstname> <studentniadvisoraddress> <studentniadvisorcity> <studentniadvisorstate> <studentniadvisorzip> <studentniadvisoremail> <studentniadvisoremailreplyto> <studentniadvisorphone> <studentniadvisorofficenumber> <studentniadvisorextension>
Other Advisors (examples only) Replace **XXXXX** in code as follows: System Administrator: ADMIN Athletic Advisor: ATHLETIC Other: OTHER	<studentoth**XXXXX**advisor-lastname> <studentoth**XXXXX**advisor-firstname> <studentoth**XXXXX**advisoraddress> <studentoth**XXXXX**advisorcity> <studentoth**XXXXX**advisorstate> <studentoth**XXXXX**advisorzip> <studentoth**XXXXX**advisoremail> <studentoth**XXXXX**advisore-mailreplyto> <studentoth**XXXXX**advisorphone> <studentoth**XXXXX**advisor-officenumber> <studentoth**XXXXX**advis-orextension>

Merge Field Group	Merge Field Codes (E-mails)
Disb. Details	<fundsourcecode> <awardyear> <awardamount> <disbursementnumber> <disbursementdate> <expectedamount> <disbursementstatus>
User (School) Defined Fields Any merge field code ending with **_SDF**	Examples: <FormerRoomates_SDF> <LicensePlate_SDF> <ParkingSpace_SDF> <AnySchoolDefinedField_SDF>

The expiration deadline date is required to populate the Incomplete grade mail merge fields on Activities. The Final Grades form will always have the expiration deadline date, even if the Incomplete grade is replaced prior to the expiration date. The Incomplete expiration deadline date will be compared to the Date Posted using the full Month/Day/Year date format and not just the Month/Day format, as this is used to determine if the expiration date is in the past.

Whenever a configured E-mail Activity is triggered and the student's grade changes from any grade to Incomplete, the following mail merge fields will appear and be populated with data within the E-mail body:

- IncompleteGradeCourse
- IncompleteGradeCourseTerm
- IncompleteGradeExpirationDate
- IncompleteGrade

Whenever a configured E-mail Activity is triggered and the student's grade changes from Incomplete to any grade, the following mail merge field will appear and be populated with data within the E-mail body:

- IncompleteGradeCourse
- IncompleteGradeCourseTerm
- IncompleteGradeExpirationDate
- IncompleteGrade
- IncompleteGradeReplaced

Merge Field Codes for Job Notification E-mail Activities

When creating a Job Notification E-mail activity template, you can configure advisor groups as **From Advisor** on the Activities Code Setup form. Advisor-related merge field codes are available for groups beginning with <<Student**##**Advisor...>>, where **##** represents modules AM, FA, SA, AD, CS, LM, and Other.

In addition, the following merge field codes are available for Job Notification E-mail activities:

<programversiondesc>
<attachmentsummary>
<attachmentdetail>
<programversion>
<enrollmentdescription>
<enrollmentexpectedend>
<campusdirectorofcareer>
<campusofficialschoolname>
<campusphone>
<campuspresident>

<campusstate>
<campuszip>

Meeting Activity

You can record a meeting activity related to students or employers. First you must set up the meeting activity under Lists > Contact Manager > Activities.

Next, you must select the student or employer with whom the meeting is to be scheduled.

To add or edit a meeting activity with a selected student or employer:

1. **Find** the student (or employer) for whom you want to add or edit the meeting activity. Or, select a student from the **Recent Students** list box at the top of the CampusNexus Student work area.
2. Select **View > Contact Manager > Activities**. The Contact History form for the selected student will appear in the work area.

   Click **Add Activity** to add a new activity or select an existing meeting and click **Edit Activity**. The Activity form is displayed.
3. Check the **Assign To** box to be sure the staff person who will attend the meeting is showing.
4. Select the meeting **Activity** from the list. (If you don't see an activity that matches what you want, new activities can be added by going to the Contact Manager option under the Lists menu. See the Lists > Contact Manager > Activities topic for more information.)
5. When you select an activity, the description of the activity will be inserted in the **Subject** box as a default. You can change the subject to anything you want.
6. If you are setting up a meeting that will occur later, the **Status** will be Pending. If you are recording the meeting after it has been completed, the **Status** will probably be Closed or Follow Up.
7. Select options from the other list boxes as necessary.
8. Enter any **Comments** about the meeting.
9. Click **Save** to save your changes. If the date of the meeting is not today, you will get a warning message. Click **Yes** to continue.
10. Click **Cancel** if you change your mind about adding the activity before you save it.

Message Activity

The Message activity is sort of like a scaled down internal e-mail system. It is used to send messages between staff members about students and employers. It can be sent to anyone to whom the user is authorized to assign activities.

Students or employers do not have a message record attached to their contact history.

Before a message activity can be recorded, you must define the activity under Lists > Contact Manager > Activities.

To add or edit a message activity:

1. Select the student or employer using the normal procedures.
2. Select **View > Contact Manager > Activities**. CampusNexus Student displays the Contact History form.

   Click **Add Activity** to add a new message activity or select an existing message activity and click **Edit Activity** to see the details. CampusNexus Student will display the Activity form.
3. Check the **Assign To** box to be sure the staff person who will receive the message is showing.
4. Select the message **Activity** from the list. (If you don't see an activity that matches what you want, new activities can be added by going to the Contact Manager option under the Lists menu. See the Lists > Contact Manager > Activities topic for more information.)
5. When you select an activity, the description of the activity will be inserted in the**Subject**box as a default. You can change the subject to anything you want.
6. The **Status**will be Pending.
7. Select options from the other list boxes as necessary.
8. Enter the text of the message in the large box at the bottom of the form.
9. Click **Save**to save your message. If the date of the message is not today, you will get a warning message. Click**Yes** to continue.

Daily Contact Manager Messages Tab

After the message has been saved, the recipient will see the message as a row on the Daily > Contact Manager > Contact Manager > Messages tab. You can click on the row to see the text of the message in the box on the lower portion of the form. Click Mark as Read or Reply as necessary to handle the message.

An alternative method of recording and sending a message is provided under the **Daily > Contact Manager > Contact Manager > Messages** tab. If you click Add here, CampusNexus Student displays a similar but slightly different message form.

The net result of using this form is the same as described at the top of this topic. The message is displayed on the Contact Manager Messages tab and nothing appears on the student's or the employer's contact history.

Other Task Activity

Choose this type of activity to add a record for an activity that does not fall under one of the other types. Before you can initiate an "other task" activity, you must set up the activity under Lists/Contact Manager/Activities.

To record an "Other Task" activity for a student or employer:

1. Select the student or employer by the normal procedures.
2. Select **View** > **Contact Manager** > **Activities**. The Contact History form for the selected student will appear in the work area.
3. Click **Add Activity** to add a new Other Task activity, or select an Other Task activity and click **Edit Activity** to see the details. CampusNexus Student displays the Activity form.
4. Check the **Assign To** box to be sure the staff person who will be responsible for the task is showing.
5. Select the Other Task **Activity** from the list. (If you don't see an activity that matches what you want, new activities can be added by going to the Contact Manager option under the Lists menu. See the Lists > Contact Manager > Activities for more information.)
6. When you select an activity, the description of the activity will be inserted in the**Subject**box as a default. You can change the subject to anything you want.
7. If you are setting up a task that will occur later, the **Status** will be Pending. If you are recording the task after it has been completed, the **Status** will probably be Closed or Follow Up.
8. Select options from the other list boxes as necessary.
9. Enter any **Comments** about the task.
10. Click **Save** to save your changes. If the date of the task is not today, you will get a warning message. Click **Yes** to continue.

Daily Contact Manager Activities

Once the "Other Task" activity has been recorded for the student or employer, the responsible staff member can see it on his or her Contact Manager Activities form (Daily > Contact Manager > Contact Manager > Activities).

The Other Task activity can be edited or closed at the convenience of the user.

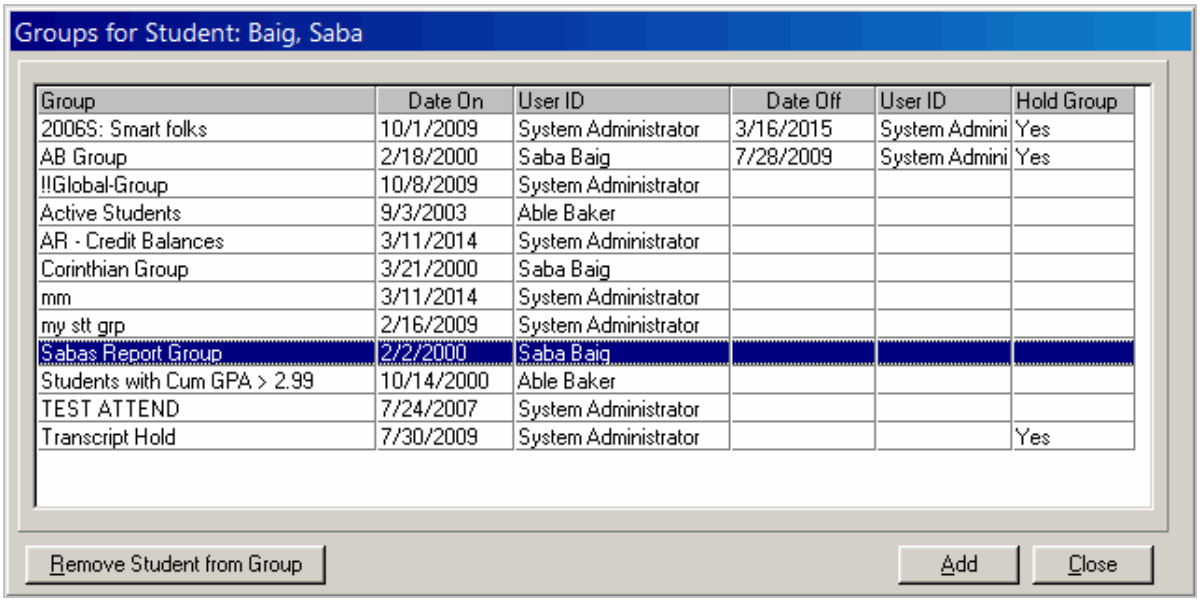
Groups for a Student

Use the Groups for Student form to view or change the group membership of a student. A student can be assigned only to existing groups created by another procedure such Search or Report Selection. Furthermore, the groups must be designated as manually maintained groups that are marked as public if the groups were initially created by someone other than yourself.

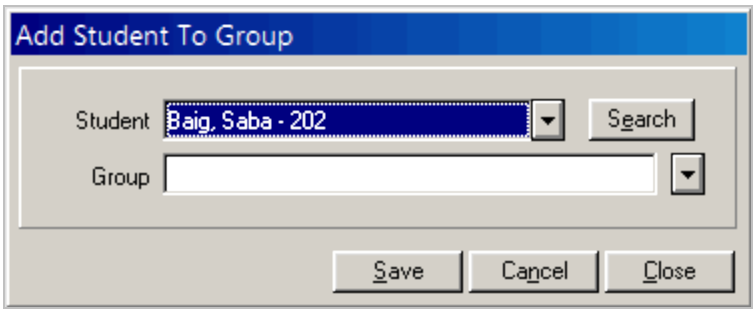
To view or edit the group membership for a student:

1. Select a student.
2. Navigate to **View** > **Contact Manager** > **Student Groups**. The Groups for Student: <student name> form is displayed.

   The Date On column indicates the dates when the student was added to a group. The Date Off column indicates the dates when the student was removed from a group.



3. Click **Add** to add the selected student to a new group. The Add Student To Group form is displayed.



3. To add a different student to a group, select a **Student** from the drop-down list or click **Search** to find the student.
4. Select a **Group**.
5. To remove a student from a group, select the group from which to remove the student.
6. Click **Remove Student from Group**.

Note: This button is available only if the Group Type is M – Manual and you have security rights to delete students from groups.

7. A confirmation message is displayed. Click **Yes**.

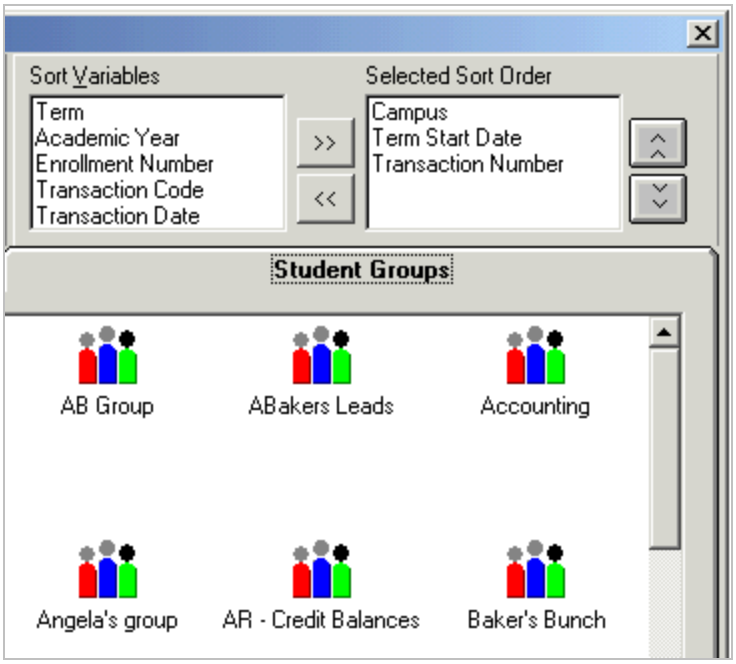
   The Date Off field in the student group grid is updated to indicate the date when the student was removed from the group. If applicable, the red/green "hold" light on the toolbar is turned on or off.

8. Click **Close** to close the form.

Student Groups Menu

This menu is displayed on the main menu bar from time to time when a user opens the Report Selection form. It is one of a few such menu options that are related to right-click shortcut menus. In this case, if you right-click on a report, the Student Groups option is displayed when the Report Selection Form is displayed. It provides an alternative means of choosing how you would like to view the list of available student groups on the form.

If you select the **Icon View** option, CampusNexus Student lists the student groups as icons.



If you select the **List View** option, CampusNexus Student lists the student groups as text only.

Create Labels

This procedure is an easy way to create mailing labels with merge codes and postal bar codes. It is a three-part procedure involving both CampusNexus Student Contact Manager and the mail merge features of Microsoft Word.

- Part 1 - Assign an "Activity" Name to Your Label where you use Contact Manager to name an "activity" for your labels.
- Part 2 - Define the Labels with Merge Codes and Postal Bar Codes where you use Contact Manager to start the label definition process in Word, and then you use Microsoft Word to define the content of your label.
- Part 3 - Test Your New Mail Merge Labels where you test your work by printing some test labels for selected students.

Note: Because there are several steps in each part of this procedure, we suggest that you print this Help topic and keep the hard copy by your side while you work your way through it.

This procedure takes advantage of the Word feature that uses predetermined formats for **Avery Labels**. You can select the Avery mailing label that you use in your school. Determine which Avery Label format (number) you are going to use and how many lines of information can be printed on each label before you start the setup procedure.

For our example, we will set up a label format (Avery 5160) to be used on information packets that are sent to new leads.

Part 1 - Assign an "Activity" Name to Your Label

1. Navigate to **Lists > Contact Manager**. The Setup - Contact Manager Lists form is displayed. Click the Activities tab.
2. Click **Add** to add your new label.
3. When the **Activities Code Setup** form is displayed, enter the data for your label. We suggest that you use a prefix on the name to identify the department in which it is used. For Admissions, the prefix is "AM". Our example label will have a **Code** of AM-NL (up to eight characters in the code) and "AM-New Lead Label" for the **Description**.

   Department Prefixes

Prefix	Module
AD	Academic Records
AM	Admissions
BS	Bookstore/Inventory
CM	Contact Manager
DE	Distance Education
FA	Financial Aid
PL	Placement
SA	Student Accounts
SY	System

4. Select Letter for the **Event Type**.

5. Leave Duration at zero.
6. In the Contacts frame, enable the **Required** option for **Student**.
7. In the Send To box, select **Student**.
8. Click **Save** to save your new "activity" (label) and leave the form open for the next step.

Part 2 - Define the Labels with Merge Codes and Postal Bar Codes

1. Ensure that a folder exists to match the **Letter Path** setting in the **Setup > System > General** tab. If the folder does not exist, create one, or change the Letter Path setting to match a folder that does exist. The default path is `C:\Program Files\CMC\CampusNexus Student\Letters`.
2. Click **Edit Letter**. Because this is the first time we are accessing the "letter" file, the program has not yet created it. A message is displayed to ask you if you want to create one. Click **Yes** to create the letter file document **AM-NL.-doc** for our example and start your new label. CampusNexus Student displays a message in the lower left corner that says "Opening Word" until Word opens with a blank page. Be patient, it could take a few seconds.
3. If Word is not already maximized on your screen, maximize it (right-click on the task bar icon for the Word document and select **Maximize**).
4. From the Word menu, start the Mail Merge Wizard.
   Note: For Word 2003 or earlier: **Tools > Letters and Mailings > Mail Merge Wizard**; for Word 2007 or later: **Mailings > Start Mail Merge > Step-by-Step Merge Wizard**
5. When the Wizard is displayed, make sure that you are on **Step 1 of 6** (Step 1 of 6 is displayed unless the Wizard has been run before. If necessary, click **Previous** to return to Step 1 of 6.). Select **Labels** as the document type, and click **Next: Starting document** to continue.
6. When **Step 2 of 6** is displayed, click **Label options ...** to pick the label that your school uses in this situation. Select the **Tray** to be used on the printer. Click **OK** to accept the settings. Now you will see all your mail merge codes and bar codes formatted to your Avery label format. Then click **Next** to proceed to Step 3 of 6.
7. When **Step 3 of 6** is displayed, click **Next: Arrange your labels**. We will not be making any changes on Step 3 of 6.
8. When **Step 4 of 6** is displayed, place the cursor in the first label and click **Postal bar code**.
9. When the **Insert Postal Bar Code** form is displayed, select **StudentZip** from the drop-down menu, and click **OK** to save the change.
   Note: The message "ZIP code not valid!" indicates that the ZIP code data has not yet been loaded. This will happen during the merge process later.
10. Move the cursor to the second line on the first label. On the Mail Merge Wizard menu, click **More items**.
11. When the **Insert Merge Field** form is displayed, select a merge code for each field to appear in the label. For example, in the **Last Name** field, select the merge code **StudentLastName**. Continue to create the label format by adding the fields you require.
12. From the Mail Merge Wizard menu on **Step 4 of 6**, select **Update all labels** to duplicate the label format for every label, and click **Save** to save the changes.
13. **Save** and **Close** the document file **AM-NL.doc** and return to the CampusNexus Student **Activities Code Setup** form and click **Save** and **Close**.

You are ready to test your mail merge labels.

Part 3 - Test Your New Mail Merge Labels

To test your new labels, select a few leads or students and assign the "activity" that represents your new labels.

1. Select a student using the Recent Students list or the Search tool.
2. Select **View** > **Contact Manager > Activities**. The Contact History form is displayed.
3. Click **Add Activity** to open the Activity form.
4. Select the**Activity**from the drop-down list that represents your new label. In our example, this is "AM-New Lead Label".
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.
6. Repeat steps 1 through 5 for a few more students; at least enough students to fill a couple of rows of the label form so you can see how the spacing works out. When you have enough students (or leads) selected, go on to the next step.
7. Navigate to **Daily > Contact Manager > Letters**. The Print Letters form is displayed.
8. Select the grid line that describes your new labels. Under **# to Print**, you should see the number of student records you selected for the test. In our example, we will print labels for six (6) students.
9. Click **Print Letter**. CampusNexus Student calls Microsoft Word and Word opens the file containing the data for the selected students. The data is merged with the label format and displayed on your screen. This process could take a little while, depending on how many students you selected. Be patient.
10. Load your label forms paper into the printer tray you specified earlier.
11. From the Word menu, select **File > Print** (or press **Ctrl+P**) to print your labels.
12. Click **File > Exit** to close Microsoft Word and return to CampusNexus Student. Word asks a couple of questions about saving changes to the forms. You will normally click **No**to these questions.
13. When you return to CampusNexus Student, it will ask if you want to clear the student count for your label form. As with other letters or activities, you would normally say **Yes**. If you think you may have to reprint the labels for any reason, say **No**.

If you find that your labels need a little adjusting, go back to the beginning of Part 2. When you click **Edit Letter**, the program finds your label "letter" and starts Word with the formatted label document. You can edit the document just like you would any other letter. See your Microsoft Word manual for more details on editing mail merge documents.

Automatic Activity Scheduler

You can set up an automatic procedure to assign your new label "activity" to students based on some triggering condition. In our new lead example, you could cause the label to be printed for each new lead that enters the system. See the topics on Activity Scheduler for more information on this procedure.

Multiple Disbursements

Customers who purchase a CampusNexus license can use the Multiple Disbursements feature to schedule more than one disbursement per payment period (or term) in an automated fashion. Though CampusNexus Student has always allowed for the manual addition of disbursements, there has never been an option via Disbursement Schedules to facilitate the scheduling of more than one disbursement. The exception is for the regulatory requirement when awarding a Direct Loan and using the configuration to specify a minimum number of disbursements per loan.

Multiple Disbursements can be used to automate the determination of disbursements dates, as opposed to using Disbursement Schedules (which is disabled when a customer enables Multiple Disbursements), and still limit the process to a single disbursement per payment period or term. This significantly reduces the amount of annual maintenance of some configurations under **Lists > Financial Aid**, and allows institutions to define the structure for their disbursements dates via a set of rules so that they automatically populate the dates desired.

Note: The Multiple Disbursement feature relies on the use of Term Association for Term based programs; it is important to ensure Term Association is configured and maintained. Multiple Disbursements cannot support Program Versions offered via Non-standard Term. It is important for users to evaluate their programs before activating this feature. A campus that offers Programs via Non-standard Term should not activate Multiple Disbursements. Options to facilitate Non-standard Term in this matter are under consideration for a future release.

Having an active CampusNexus license is essential to use CampusNexus features. If you do not have a license, you will be able to see some aspects of some features (via the user interface and Help), and you may learn what options you will gain with CampusNexus, but the screens will show clear reminders that feature activation requires the license.

Note: Before using Multiple Disbursements features, set up the required system and campus level definition rules. See Configuring Multiple Disbursement Definitions.

Configuring Multiple Disbursement Definitions

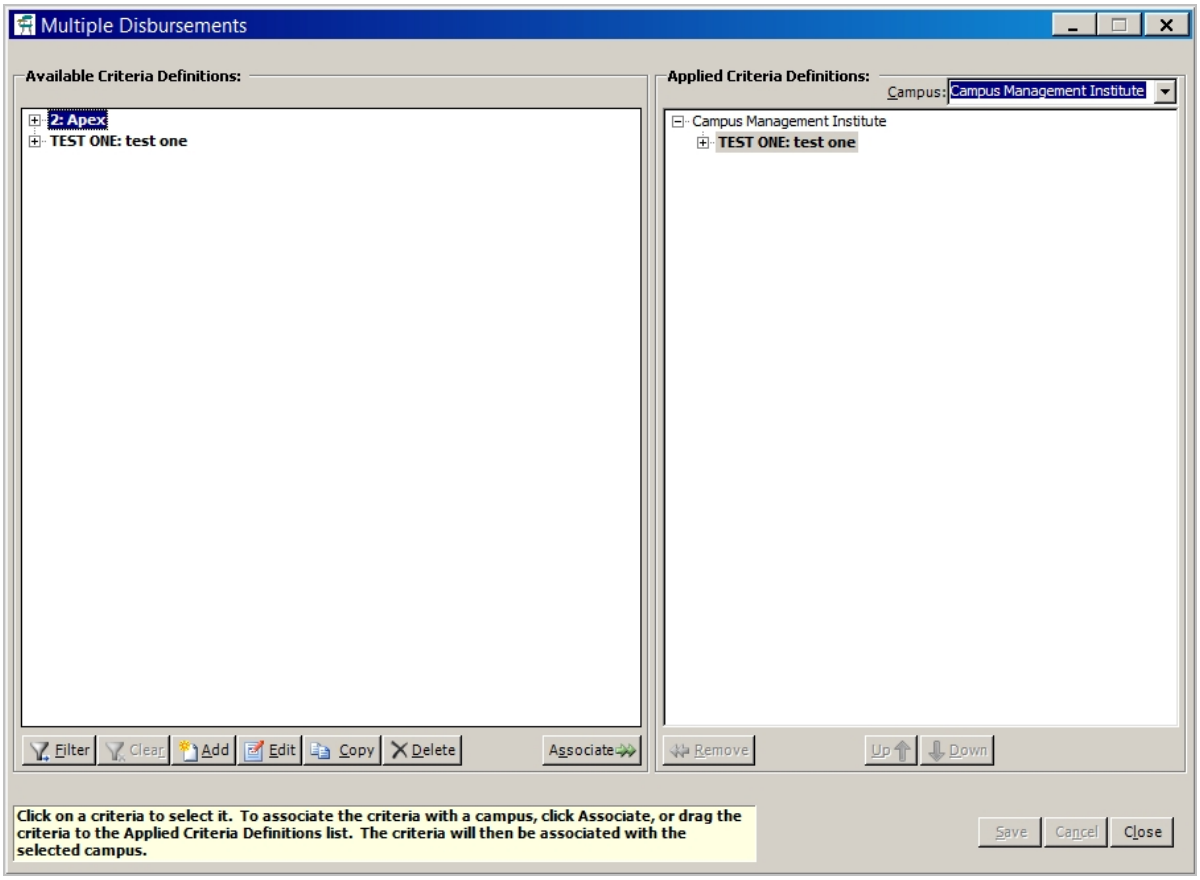
Before enabling the Multiple Disbursements feature in the Financial Aid tab of the of the Campus Information form, the Multiple Disbursement Criteria Definitions must be created and saved for the campus being configured. The Multiple Disbursements form allows users to perform a variety of configuration tasks (e.g., add, edit, copy, delete, and associate their rules to a campus) for Multiple Disbursements. The form supports Drag and Drop capability. There is also a Filter function so that after rules have been established, the user can filter for specific items to see rules that have specific conditions.

The Multiple Disbursements feature uses rules created in several areas of CampusNexus Student. The Multiple Disbursements form contains Criteria Definitions that enable users to perform a variety of configuration tasks that can be driven by the institution's business rules concerning Multiple Disbursements.

Note: If the Definitions are not configured for a campus, an error message is displayed when the Enable Multiple Disbursements check box is selected on the Campus Information form's Financial Aid tab.

Rules in the Applied Criteria Definitions section of the Multiple Disbursement form are applied in order, so it is important for institutions that opt to configure a variety of rules that the most specific rules be at the top of the list. If a very general rule is at the top (for example, no specific information about population and set to assign X% of payment period) and it is followed by a very specific rule (for example, a rule for first-time borrowers living in the state of Tennessee), the dates would likely be assigned by the first rule rather than the second rule, because Multiple Disbursements looks to see if a date can be assigned and would move to subsequent criteria only if it cannot be defined by the preceding rule.

1. Navigate to: **Tools > Financial Aid > Multiple Disbursements**. The Multiple Disbursements form is displayed.



2. Select a **Campus**.
3. Drag and drop Definitions from the **Available Criteria** to the Applied Criteria list as needed, or select the Available

Criteria and click **Associate** to move the Definition.

4. Drag and drop definitions from the Applied Criteria list to the Available Criteria list to remove them, or select Definitions on the Applied Criteria Definitions list and click **Remove** to move them back to the Available Criteria Definitions list.
5. Click **Filter** to filter the Available Criteria list.
6. Click **Clear** to clear the filter, allowing a new filter to be created.
7. Click **Add** to add a Definition.
8. Select a Definition and click **Edit**to change the Definition properties using the Multiple Disbursement Editor.
9. Select a Definition and click **Copy** to create a new definition with the same properties for later editing.
10. Select a Definition and click **Delete** to remove it from the Available Criteria list.
11. Select a Definition in the Applied Criteria list and click **Up** to move the Definition higher on the list,.
12. Select a Definition in the Applied Criteria list and click **Down** to move the Definition lower on the list
13. Click **Save** to save the settings.
14. Click **Cancel** to cancel changes.
15. Click **Close** to close the form.

Field Descriptions

Field	Description
Filter	Activates the filter window
Clear	Clears the filter and shows all criteria
Add	Adds a new criteria and its associated rules
Edit	Opens the Multiple Disbursements Editor form, to edit the selected Definition Criteria
Copy	Copies the Definition Criteria and opens a new copy of it in the Multiple Disbursements Editor
Delete	Deletes the selected Definition Criteria
Associate	Associate the selected Definition Criteria with a campus
Remove	Removes the selected Definition Criteria
Up/Down	Moves the selected Definition Criteria up or down as needed

Enabling Multiple Disbursements

Selecting the Enable Multiple Disbursement check box on the Financial Aid tab of the Edit (Campus) form activates the process for the specified campus. Doing so instructs CampusNexus Student to not allow the use of Disbursement Schedules, and that the rules a client configures will be used to determine disbursement dates. Ensuring that this feature works properly requires testing before deployment into a production environment. Once tested, best practice would be to configure the rules during an off-peak time to complete the process and test without an impact to packaging.

Note: Before using Multiple Disbursements features, set up the required system and campus level definition rules. See Configuring Multiple Disbursement Definitions.

1. Navigate to: **Setup > Campus Locations**. The Campus Locations form is displayed.
2. Select a campus.
3. Click **Edit**. The Campus Information form is displayed.
4. Select the **Financial Aid** tab. The Financial Aid tab content is displayed, containing the Enable Multiple Disbursements and Auto Recalculate Multiple Disbursements check boxes. If Enable Multiple Disbursements is not selected, the Auto Recalculate Multiple Disbursements screen element remains unavailable for selection (appears dimmed).
5. Select the **Enable Multiple Disbursements** check box. The Auto Recalculate Multiple Disbursements screen element is enabled, and the associated check box is cleared.
6. Click **Save** to save the settings.
7. Click **Cancel** to cancel changes.
8. Click **Close** to close the form.

Auto Recalculate Multiple Disbursements

With Multiple Disbursements, users structure disbursement dates via a set of rules which then automatically populate the dates desired. The Recalculate Multiple Disbursements feature can be configured to automatically reevaluate scheduled and canceled disbursement dates under specific conditions. Though CampusNexus Student has always allowed for the manual evaluation of disbursement dates, there has never been an option to facilitate an automatic reevaluation of more than one disbursement. This feature can be used, for example, if the Student Pace Evaluator were to be run for a student, and the Payment Period dates shift, there might be some cases where a disbursement date would also need to shift.

Note: Before using Multiple Disbursements features, set up the required system and campus level definition rules. See Configuring Multiple Disbursement Definitions.

Having an active CampusNexus license is essential to use CampusNexus features. If you do not have a license, you will be able to see some aspects of some features (via the user interface and Help), and you may learn what options you will gain with CampusNexus, but the screens will show clear reminders that feature activation requires the license.

Enabling Auto Recalculate Multiple Disbursements

Selecting the Auto Recalculate Multiple Disbursements check box on the Financial Aid tab of the Edit (Campus) form triggers a reevaluation of the scheduled and canceled disbursement dates under specified conditions. Disbursements in a scheduled status can be reevaluated but those that have been paid or batched to send can not be reevaluated using this feature. CampusNexus Student will use configuration settings from the Configure Multiple Disbursements form to reevaluate scheduled disbursements when specific information is changed, like payment period dates, state, or residence for rules that are different based on state, or when a student changes courses or has different course start dates.

Note: Before using Multiple Disbursements features, set up the required system and campus level definition rules. See Configuring Multiple Disbursement Definitions.

1. Navigate to: **Setup > Campus Locations**. The Campus Locations form is displayed.
2. Select a campus.
3. Click **Edit**. The Campus Information form is displayed.
4. Select the **Financial Aid** tab. The Financial Aid tab content is displayed, containing the Enable Multiple Disbursements and Auto Recalculate Multiple Disbursements check boxes.
5. If Enable Multiple Disbursements is not checked, select it now. The Auto Recalculate Multiple Disbursements screen element becomes available for selection.
6. Select the **Auto Recalculate Multiple Disbursements** check box.
7. Click **Save** to save the settings.
8. Click **Cancel** to cancel changes.
9. Click **Close** to close the form.

Multiple Disbursement System Settings

With Multiple Disbursements, users structure disbursement dates via a set of rules which then automatically populate the date(s) desired. The Multiple Disbursements feature can be configured to automatically exclude weekends and/or holidays when determining disbursement dates, or use the state on the student's ISIR to determine the date of a disbursement (state laws may require disbursements to occur on specific dates or under specific conditions). While CampusNexus Student Financial Aid Automation (FAA) allows for the configuration of exclusions, this feature is not available outside of CampusNexus Student FAA without purchasing a CampusNexus license.

Note: Before using Multiple Disbursements features, set up the required system and campus level definition rules. See Configuring Multiple Disbursement Definitions.

Having an active CampusNexus license is essential to use CampusNexus features. If you do not have a license, you will be able to see some aspects of some features (via the user interface and Help), and you may learn what options you will gain with CampusNexus, but the screens will show clear reminders that feature activation requires the license.

Configuring Multiple Disbursements System Settings

Configuring the Multiple Disbursements System Settings creates a set of rules that are used across all campuses in relation to how Multiple Disbursements will handle weekends, holidays, and the legal state of residence from a student's ISIR in determining the dates of disbursements.

Note: Before using Multiple Disbursements features, set up the required system and campus level definition rules. See Configuring Multiple Disbursement Definitions.

1. Navigate to: **Setup > Financial Aid > Packaging tab**. The Financial Aid - Settings form is displayed.
2. Select the **Multiple Disbursements** tab. The Multiple Disbursements options in the Packaging section is displayed.
3. Select **Yes** in the Exclude Weekends line to instruct the Multiple Disbursements feature to not count weekend days when calculating disbursement dates across all campuses.
4. Select **No** in the Exclude Weekends line to instruct the Multiple Disbursements feature to count weekend days when calculating disbursement dates across all campuses.
5. Select **Yes** in the Exclude Holidays line to ensure that disbursement dates do not fall on a scheduled holiday when calculating disbursement dates across all campuses. The default is No.
6. Select **No** in the Exclude Holidays line to ensure that disbursement dates may fall on a scheduled holiday when calculating disbursement dates across all campuses.
7. Select **Yes** in the Use State from ISIR line to instruct the Multiple Disbursements feature to refer to the student's legal residence on their ISIR, in accordance with the institution's policy on using the ISIR instead of the Student Master for the student's residence.
8. Select **No** in the Use State from ISIR line to instruct the Multiple Disbursements feature to refer to the student's legal residence on their current Student Master, in accordance with the institution's policy on using the Student Master for the student's residence. The default setting on this line is No.
9. Click **Save** to save the settings.
10. Click **Close** to close the form.

Configuring Additional Multiple Disbursement Criteria

The Disbursement Approval Criteria Code Setup form contains the Additional Multiple Disbursement Criteria tab, where users can refine Multiple Disbursement Criteria. Configuring these settings ensures that the institution's business rules for Multiple Disbursements are maintained.

While the initial disbursement criteria set up in CampusNexus Student can be used in Multiple Disbursements (by clicking the Copy Initial button), an institution may not want to make the subsequent disbursements dependent upon specific GPA conditions (if they are monitoring the results of GPA at the conclusion of the semester, for example).

Note: Before using Multiple Disbursements features, set up the required system and campus level definition rules. See Configuring Multiple Disbursement Definitions.

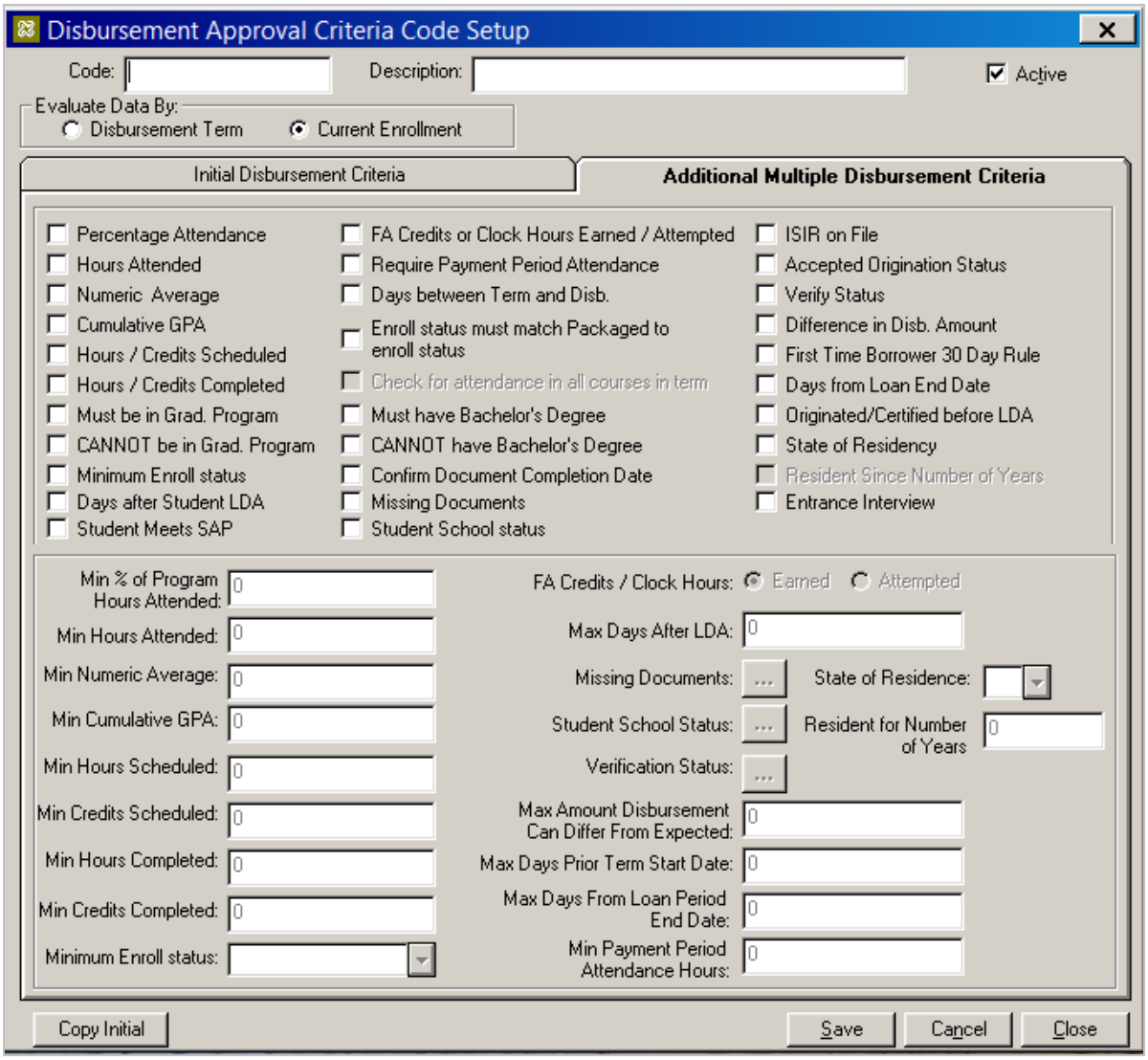
1. Navigate to: **Lists > Financial Aid > Disbursement Approval Criteria**. The Disbursement Approval Criteria Code Setup form is displayed.
2. Select the **Additional Multiple Disbursement Criteria** tab. The Additional Multiple Disbursement Criteria tab is displayed.
3. Click **Copy Initial** to copy over the criteria configured in the Initial Disbursement Criteria tab.
4. Updates this form as needed to conform with the institution's business rules associated with Multiple Disbursements. For more information about the fields on this form, see Disbursement Approval Criteria.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Multiple Disbursements Forms

To ensure that the Multiple Disbursements feature is used properly, several forms have been created or updated. Where necessary, clients who have not purchased a CampusNexus license will see a message informing them that they may see and configure Multiple Disbursement related settings, but the feature will not work without a license.

Disbursement Approval Criteria Code Setup Form

The Disbursement Criteria tab has been renamed the Initial Disbursement Criteria tab of the Disbursement Approval Criteria Code Setup form, for institutions that have purchased a CampusNexus license. The Additional Multiple Disbursement Criteria Tab enables campuses to configure Initial Disbursement Criteria, and then copy the criteria to the Additional Multiple Disbursement Criteria tab so that the criteria can be changes for disbursements that occur after the first one.



Field Descriptions

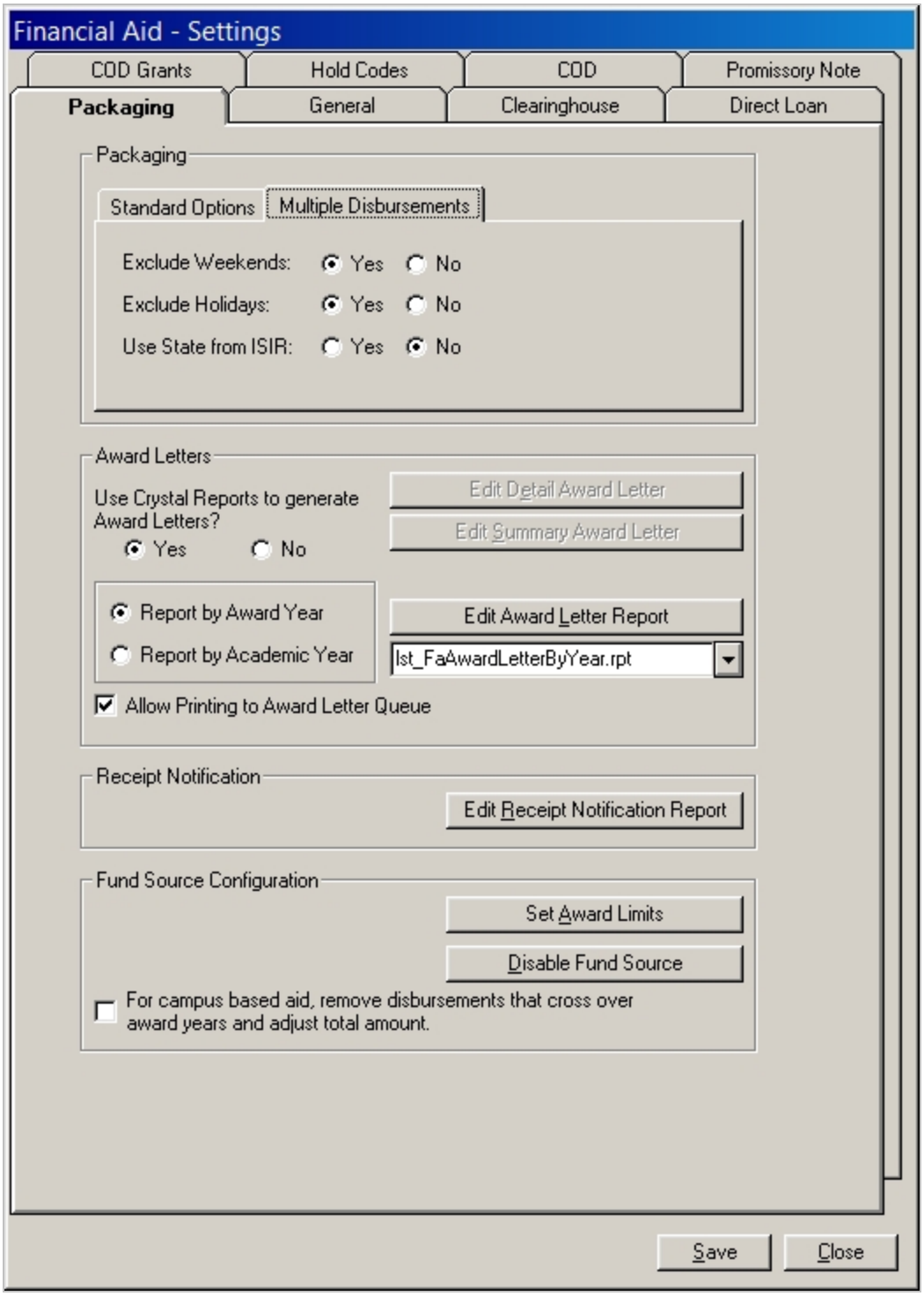
Field	Description
Copy Initial	This button takes all set attributes of the initial disbursement and carries them over to the Additional Multiple Disbursement Criteria tab. Note that is if the user sets the information on the Additional Multiple Disbursement Criteria tab and then clicks Copy Initial, it may overwrite this information.

Field	Description
Initial Disbursement Criteria	This tab contains the criteria originally configured in the Disbursement Criteria tab of the form.
Additional Multiple Disbursement Criteria	Reproduction of the Initial Disbursement Criteria tab, where criteria can be changed for subsequent disbursements.

System Configuration of Multiple Disbursements Form

There are two levels of configuration for the Multiple Disbursements feature, one set at the campus level, and another for the entire institution (system level). System level configuration consists of setting up the way Multiple Disbursement calculates the number of days between disbursements, and where the student's legal state of residence is gathered.

Note: When Yes is selected for Exclude Weekends and Exclude Holidays, the disbursement date will be the next available business day after the weekend or holiday, except in cases where that date would be outside the Payment Period or Term. In those cases, the disbursement date will pull back to the day prior to the weekend or holiday.



Field Descriptions

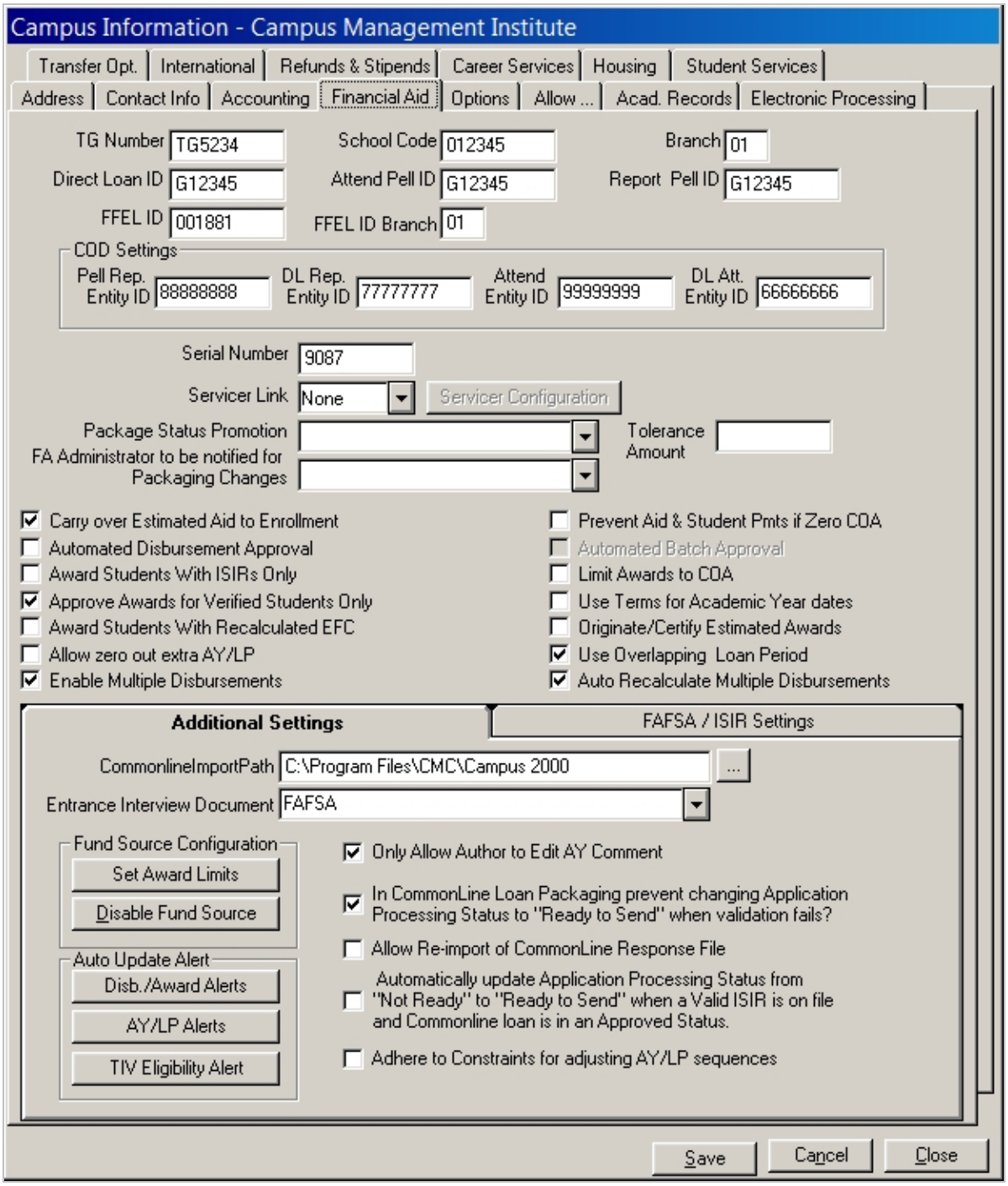
Field	Description
Exclude Weekends	System-wide option that allows users to exclude weekends when disbursement dates are being determined. The default on this configuration is Yes but clients may choose to set the option to No if they wish to have disbursement dates that include weekend dates.

Field	Description
Exclude Holidays	System-wide option that ensures that disbursement dates will not fall on a scheduled Holiday (via Lists > Academic Records > Calendar). The default on this option is No.
Use State from ISIR	System-wide option that allows users to specify if the institution's policy is to use the state from the Institutional Student Information Record (ISIR). The default on this option is No. If left as No, or if the student does not have an ISIR, the system always uses the state of residence from the Student Master.

Multiple Disbursement Configuration in Campus Information

The Campus Information form's Financial Aid tab is used to configure various packaging properties, including those used by Multiple Disbursements. Multiple disbursements can be enabled or disabled, and the Auto Recalculate function of this feature is also controlled from this form.

Having an active CampusNexus license is essential to use CampusNexus features. If you do not have a license, you will be able to see some aspects of some features (via the user interface and Help), and you may learn what options you will gain with CampusNexus, but the screens will show clear reminders that feature activation requires the license.

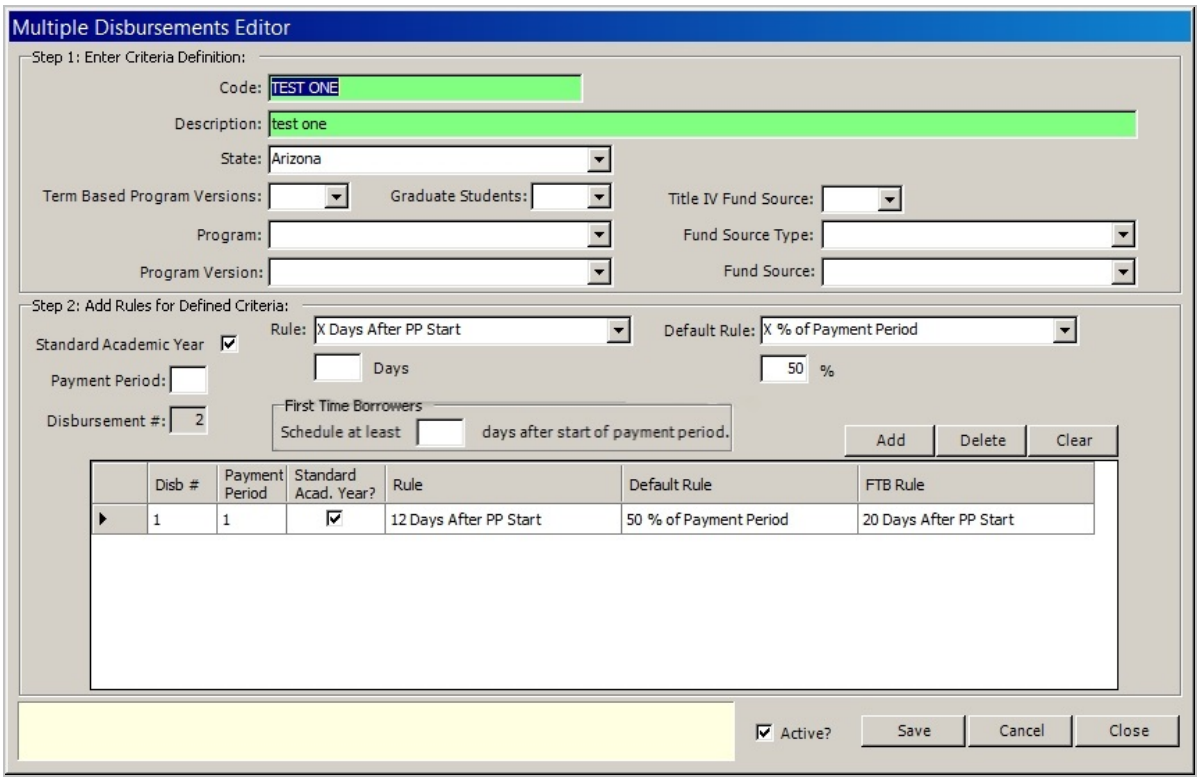


Field Descriptions

Field	Description
Enable Multiple Disbursements	Selecting the Enable Multiple Disbursement check box activates the Multiple Disbursements feature for the specified campus. Once you activate the process, CampusNexus Student will not allow the use of Disbursement Schedules and the configured rules are used to determine disbursement dates. **Note**: Before using Multiple Disbursements features, set up the required system and campus level definition rules. See Configuring Multiple Disbursement Definitions.
Auto Recalculate Multiple Disbursements	Selecting the Auto Recalculate Multiple Disbursements check box triggers a re-evaluation of the scheduled and canceled disbursement dates under specific indicated conditions (such as payment period dates, state or residence for rules that are different based on state, or when a student changes courses and maybe has different course start dates). The re-evaluation will not occur when a disbursement has been paid, or batched to send. However, disbursements that are still in a scheduled status can be re-evaluated. This check box is cleared by default.

Multiple Disbursements Editor Form

The Multiple Disbursements Editor allows the user to configure Criteria Definitions, so that the rules of that Definition can be employed when setting up the Applied Criteria Definitions of the Multiple Disbursements form.



Field Descriptions

Field	Description
Program	Filter Program versions. If not selected, all Programs apply.
Program Version	Use to select Program version. If not selected, all Program versions apply.
Fund Source	Use to select Fund Source. If not selected, all Fund Sources apply.
Degree Level (Under-graduate or Graduate)	Filters both Program and Program Versions based on selection. If not selected, all Graduate Levels apply.
State	Use to select a State. If not selected, all States apply.
Term Based Program Versions	Filters both Program and Program Versions based on selection. If not selected, all Financial Aid Academic Calendars apply.
Title IV Fund Sources	Filters Fund Source based on selection. If not selected, Title IV and non-Title IV Fund Sources apply..
Fund Source Types	Filters by Fund Source Type. If not selected, all Fund Source Types apply.
X% of Payment Period	Enter 1 to 100 for % and 0 to 999 for days.

System Setup Overview

There's no getting around it. Setting up CampusNexus Student for a new institution is a lot of work! Because there is so much flexibility built into CampusNexus Student, you as the system administrator (SA) must express the policies and procedures of your school in terms that CampusNexus Student can understand. To do this, you will enter information in the tables that CampusNexus Student uses to process data flowing into and out of the system.

You will do much of the initial setup work in two forms (screens) accessed from the menu bar on the CampusNexus Student main menu. These are the Setup Menu and the Lists Menu.

If you are not logged into CampusNexus Student as the system administrator, you may not see one or more of these menu options due to security considerations. To add or change system setup options, contact your SA and request the necessary adjustments.

From the Setup Menu, the SA will set several system parameters by which to.

- Identify your campus(es)
- List your staff members
- Assign security (access rights and permissions)
- Define student status codes
- Customize the data dictionary
- Create school-defined fields
- Designate field-level security
- Define setup options at the module level (if required)

The Lists drop-down menu is module-oriented. The SA can select each module and set up the related lists of codes, descriptions, and parameters that are required in each module. Other topics in the Help system describe each list in each module in detail.

Localization for International Schools

Many features in CampusNexus Student take into account the requirements of international schools (i.e., institutions based outside of the U.S.). Date and time formats, currency symbols, address field length, mailing labels, telephone numbers, Social Security number (or other government-issued identification number), and paper size (A4) for reports are a few of the considerations that have been addressed. Many CampusNexus Student forms accommodate these requirements. The program uses data masks and settings based on the user's sign-on ID. In the case of student, staff, employer, and agency addresses, the program bases its formatting of labels and other address-sensitive documents on the country selected in the address.

In the Data Dictionary, you can change the names of fields in the tables to conform to local language and usage.

System-wide features:

- Telephone number and SSN fields are standard text boxes that allow entry of 16 characters. For each country in the Countries table, you can enter a phone data mask and an SSN data mask. The program will use these masks to fill the telephone and SSN fields on screen forms as required. For instance, when a country appears on an address form, the masks for that country control the format of the SSN and telephone fields.
- Date formats for on-screen forms can be customized using the regional settings accessible through the Windows Control Panel. In Windows 7, for example, the date format can be customized by navigating to **Start > Control Panel > Clock, Language and Region > Region and Language (Formats tab) > Additional settings... > Date (tab)**. For instance, in some countries the preferred date format is **d/M/yyyy**, i.e., 29/7/2011.
  For additional information, see Customizing the Date Format.
- Currency symbols do not appear on on-screen forms in which money amounts are displayed.
- Reports can been modified to fit on A4 paper. Currency symbols for money amounts on reports are controlled by a variable in the campus setup. Date formats for reports are configured at the workstation level based on the user's regional settings in Windows.

Setup Considerations

Keep in mind when you are setting up a school in a country other than the United States, change the labels on some data fields to reflect local usage. For instance, if the local country has a different name for a "Social Security Number (SSN)", you can change it by finding the SSN field in the SyStudent table through **Setup > Data Dictionary** and changing the label. Note that there may be several tables and forms in which a student's SSN might appear. Financial Aid forms are a good example.

Setup > Campus Locations > Campuses > Campus Information > Address

The address of the campus includes a Country field. The country selection affects the formatting of dates, phone numbers, and currency on reports. The country code of the user's default campus governs this formatting process.

Setup > Campus Locations > Campuses > Campus Information > Allow

The system prints labels from the Student Master in a defined label format. To accommodate international address labels, the format will vary. There is an option to define a report label format to be used instead of the system defined label format. The option is "Use Report Label Format for Student Labels?" If you select this option, the program will prompt for a report file name. If this option is not selected, the program will use the generic label format.

Setup > Campus Locations > Campuses > Campus Information > Options

Entry fields are provided for the currency symbol to be used on reports and the position of the currency symbol with respect to the amount. The fields are SyCampus.CurrencySymbol and SyCampus.CurrencySymbolPosition.

Setup > Staff > Staff Members > Home Address and Work Address

The Country code in these addresses will affect formatting of dates, SSN, and phone numbers in the staff member's record.

Lists > Admissions > Countries

The Countries Code Setup form includes a Default Phone Mask (16 characters) and a Default SSN Mask (16 characters). Set up the two mask fields for each country in which the school does business or from which it receives students.

Valid characters for the mask fields are:

+ Plus sign

- Hyphen

(Open parenthesis

) Close parenthesis

Octothorpe (place-holder for 0 – 9)

. Period

Space - Embedded spaces only, no leading or trailing spaces.

No other characters are accepted in the mask fields.

Toolbar > Search Reference Address

The Phone field is a 16-character text box. When searching for telephone numbers in schools having multiple countries represented in student addresses, it is not possible to assume a phone number format.

Toolbar > Recent Student List

The Recent Student List control is designed to accommodate the 16-character SSN format.

View > Contact Manager > Transcript Request
Daily > Contact Manager > Process Transcript Requests

On the Transcript Request form, when adding a new College as the addressee, the College form will include a country field. When adding an Other address, the form also includes a country field.

View > Any Module > Student > Print Label

The Print Label procedure uses the label format of the user's default campus. You can select the generic label format or a customized label, which is formatted with Crystal Reports. The label format is selected under **Setup > Campus Locations > Campus Information > Allow**.

Mail Merge

Daily > Contact Manager > Letters

The Mail Merge procedure uses the regional settings on the user's workstation for date formatting in letters.

Currency Designator for Reports

The report form handles formatting of dates on the report according to the regional settings used for the workstation date format. Currency symbols are set based on the user's default campus setting.

Customizing the Date Format

CampusNexus Student allows users to configure date formats through the Windows Control Panel.

While the default date format is the U.S. standard **mm/dd/yyyy**, the de facto standard in much of the world outside of the United States is **dd/mm/yyyy**.

By customizing the regional settings through the Windows Control Panel of the application server that is running CampusNexus Student, users can display dates in any other format that may be needed.

For specific instructions on customizing the date format using Windows regional settings through the Control Panel, refer to the corresponding Microsoft support documentation.

Note: Each time a new date format is applied using this procedure, you must fully exit CampusNexus Student and restart the application.

Error Handling

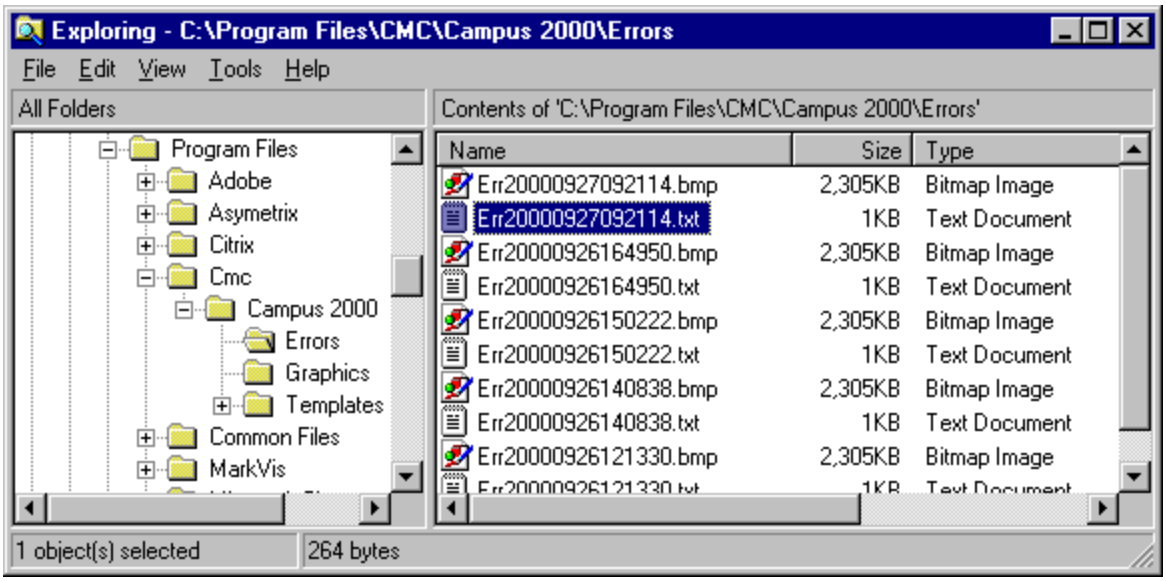
Even the most extensive testing of CampusNexus Student sometimes does not catch an error. Sometimes an error that occurs on a user's computer cannot be duplicated in the Anthology Inc. test system. Therefore, the program includes an error trap routine that captures information when that rare error that was missed in QA does occur.

Whenever a user gets an error, CampusNexus Student saves a screen image and a text file to disk. The files will be created in the `C:\Program Files\CMC\CampusNexus Student\Errors` folder (or the folder where the CampusNexus Student client program is installed). There will be a .txt and a .bmp file created - the file name will be ErrYYYYMMDDHHMMSS. Files over two weeks old will be deleted when users sign on to CampusNexus Student.

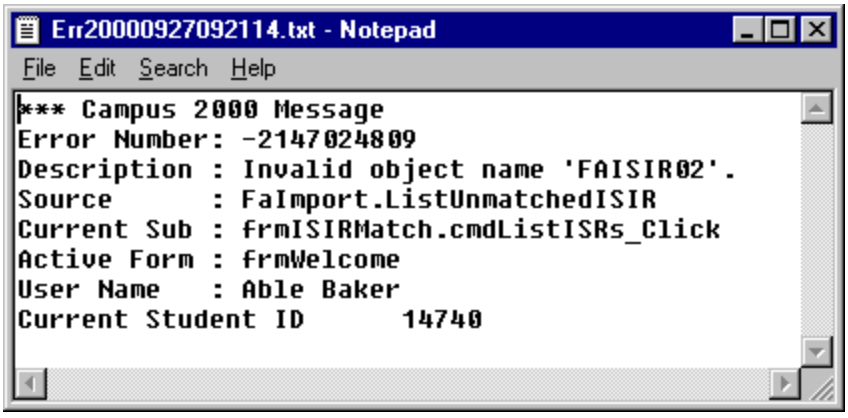
In addition, when errors are logged on the server, they will be logged as Informational messages and not Severe.

You (or the Anthology Inc. Support Rep) can use Windows Explorer to find the Errors subdirectory on your machine and examine the files.

Use Explorer to Find Error Documentation Files.



Double-click the .txt file to open it in Notepad.



Double-click the .bmp file to open it in Windows Paint.

When errors are reported to the Anthology Inc. Customer Support Department, this documentation can be valuable in determining the cause of the error. See the "System Messages" topic for more about messages that you might see when running CampusNexus Student.

System Messages

From time to time CampusNexus Student or other software that is used with it, will display messages on your screen. Here are some of the messages, what they mean, and what you can do about them. If you do not see your message here, ask your system administrator (SA) what they mean. If the SA cannot explain them, he or she will ask the Anthology Inc. support department for assistance.

Please report to your SA any messages that you see that result in stopping or closing the program on your workstation. Try to get a picture of the message if at all possible. One way to do this is to press the key combination **Ctrl+Print Screen**. This captures a picture of your screen on the Windows Clipboard. Open a blank Word document and press the **Ctrl+V** key combination to paste the clipboard image into the document. Type the circumstances under which the message appeared in the same document with the image. Print the document, or better yet, e-mail it to your SA.

If you don't have access to Microsoft Word, you do the same sort of thing with a Windows accessory program called Word Pad. Just open a new Word Pad document and paste in the image from the clipboard.

If you don't have either of these document programs available, please write down as much information as you can gather about the problem message and what you were doing at the time it occurred. Forward your notes to your SA, who will in turn forward the information to Anthology Inc..

Hour Glass

The Hour Glass icon, other a similar icon, is displayed on your screen when the program is busy doing something behind the scenes (so to speak). This is a basic Windows signal. It applies to the work being processed in the currently active window. When it appears, please wait until it disappears before continuing your work. Attempting to continue before the hour glass goes away will not give you the desired results.

Switch to … Retry

The Switch to ... Retry message occasionally appears when the program is busy processing data and you are trying to do something else. If you click on a button, or another form, or try to close a form before the program completes the previous task, this message may appear. It usually occurs when the program is trying to obtain control of a record in the database for updating, or is searching for data that is being used by someone else, or something of a similar nature. If you click the Switch to button, the program will switch to the procedure that is running. If you click the Retry button, the program will try again to perform your request (to close a form, etc.) You must click one or the other to close the message.

In rare cases, the process that is causing the message cannot proceed for some technical reason. Please report these incidents to your SA with as much detail as possible about the circumstances as possible. The SA will forward your information to Anthology Inc. for a programming adjustment.

Error 91--Object variable or With block variable not set.

This error occurs sometimes after program modifications or new data items are added to CampusNexus Student. You cannot continue with the procedure in which the error occurred until it is fixed. We try hard to find and eliminate this type of problem prior to the release of changes. However, if it should occur, please follow the procedures outlined above for recording the circumstances under which the error occurred and sending the documentation to Anthology Inc. via your SA.

Error 94--Invalid use of null.

This error occurs sometimes after program modifications or new data items are added to CampusNexus Student. When you are working with a form, you may have left blank a field required by the program. When you save the form, the program sees the blank field as having nothing in it (null). If you cannot find the blank field on the form and put something in it, you cannot continue with the procedure in which the error occurred until it is fixed. We try hard to find and eliminate this type of problem prior to the release of changes. However, if it should occur, please follow the procedures outlined above for recording the circumstances under which the error occurred and sending the documentation to Anthology Inc. via your SA.

System Codes

This topic consists of various and sundry codes used in CampusNexus Student. Usually, the codes are "hard coded" (written into the program code) in the program or they are in tables that the user cannot access via the user interface. This is done because the program must count on these codes for control of the system. Some times the codes are a little cryptic in nature so we have included them here for documentation purposes.

Academic Calendar Year Codes (Also see Payment Methodologies)

1. Credit Hours - non-standard terms
2. Credit Hours - standard terms of quarters
3. Credit Hours - standard terms of semesters
4. Credit Hours - standard terms of trimesters
5. Clock Hours
6. Credit Hours without terms

Campus Groups

The system requires at least one campus group named "All Campuses". All campuses are automatically assigned to this group. See Campus Groups under the Setup menu for more on campus groups.

Campus License Units (CLU)

In program version setup, programs can be designated as "full license units" or "half license units". Certain processing restrictions (such as financial aid packaging) are applied to program versions that are "half license units".

F - Full CLU
H - Half CLU

Contact Manager Activity (Event) Types

E-mail
Incoming Phone Call
Letter
Meeting
Message
Other Task
Outgoing Phone Call

Direct Loan Grade Level Codes

Description	Code
1st year undergraduate/never attended coll	0
1st year undergraduate/attended college be	1
2nd year undergraduate/sophomore	2
3rd year undergraduate/junior	3
4th year undergraduate/senior	4
5th year/other undergraduate	5
1st year Graduate/professional	6
Continuing graduate/professional and beyor	7

Direct Loan Origination Status

N - Not ready to send to COD[1]
R - Ready to send to COD
B - Batched to send to COD
A - Accepted by COD
E - Rejected by COD
X - Pending Credit Decision

Disbursement Option

Advanced Funding. The school re-authorizes funds to be held in reserve for use throughout the year. If the school gets close to its authorization limit, it must submit a re-quest for additional funds before any disbursement of funds that causes the school to go over its limit.

Just-in-Time. The origination records from the schools will be used to automatically set and reset authorization limits.

For 1999-2000 Pell, ED is not requiring all schools to switch to Just-In-Time. However, by 2000-2001, this is slated to be a requirement. Schools that are on reimbursement will stay on the Advanced Funding disbursement option.

Disbursement Status

N - Not Ready to Send to COD
R - Ready to Send to COD
B - Batched to send to COD
A - Accepted by COD
E - Rejected by COD

FAFSA Status Codes

A - Accepted
E - Rejected
N - Not Ready to send
R - Ready to send
S - Sent

FAGL Fund Types

G - GAPS
P - Federal Pell Grant
S - Federal SEOG
W - Federal Work-Study
K - Federal Perkins Loan
D - Direct Loan - GAPS
L - Direct Loan - Program Fund
F - FFEL
O - Other (Non-Title IV Fund)

FAGL Fund Authorization Types (Distribute Authorization)

C - By Campus
D - By Direct Loan ID
S - By Serial Number

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[1]Common Origination and Disbursement

Financial Aid Disbursement Status Codes

A - Approved for disbursement
E - Estimated
P - Pending

Financial Aid Packaging Status Codes

These statuses are hard coded, entered by the program, and not edited by users.

Packaged
Not Packaged

Financial Control Codes

1. Public
2. Private, Nonprofit
3. Proprietary

Institution Type Codes

1. Less than one year
2. One year or more but less than two years
3. Two years or more but less than three years
4. Three years or more but less than four years
5. Four years (baccalaureate degree)
6. Five years or more.

Instructor Pay Codes

In the Distance Education features of the system, lessons, exams, and book reports are flagged with a code which the user can change to one of these options. See Lesson Grades for more on instructor pay codes.

Y = Yes, pay the instructor
N = No, do not pay the instructor
P = Paid (The instructor has been paid.)

Module Identifier Codes

Each module of CampusNexus Student has components such as database tables, form, reports, and so on. The codes below are included in the names of such components to identify them as originating in a given module.

Module Codes

Module Code	Module
AD	Academic Records
AM	Admissions
BS	Bookstore
CM	Contact Manager

Module Code	Module
DE	Distance Education
FA	Financial Aid
LM	Loan Management
PL	Placement
SA	Student Accounts
SS	Student Services
SY	System

Payment Methodologies (Also see Academic Calendar Year Codes)

Formula 1 = Credit Hour - Standard terms in which the fall through spring terms are equal to or greater than 30 weeks, or the academic year exceeds the definition of an academic year and the school has a waiver.

Formula 2 = Credit Hour - Standard terms in which the fall through spring terms are less than 30 weeks without a waiver.

Formula 3 = Credit Hour with Standard or Non-Standard terms.

Formula 4 = Clock Hour or Credit Hour without terms.

Formula 5 = Nonresident portion of a program offered by correspondence without terms. (Distance Ed.)

Payment Type Codes

C = Cash
E = EFT
H = Check
N = Non-Cash
R = Credit Card

PLUS Credit Decision

A - Credit Accepted
N - Credit denied
C - Credit overridden; new credit information provided
E - Credit overridden; endorser OK
D - Credit denied; endorser not OK
X - Pending

Promissory Note Print Options

F = On-site
R = COD prints and returns to school
S = COD prints and sends to borrower
Z = Reprint at the COD

Promissory Note Status

N - Not ready to print
R - Ready to Print
P - Printed
S - Signed
X - Pending
A - Accepted by COD
E - Rejected by COD

Required Course Types

When setting up courses, you will indicate what type of course it is. CampusNexus Student has a few type codes from which you can select. Or, you can add your own course types to the list which is maintained at Lists > Academic Records > Course Type. The course type codes provided by CampusNexus Student are:

Clinical
Externship
Hands On
Laboratory
Lecture

Required Transaction Codes

In the Student Accounts module, there are a few transaction codes that are required by the system to be present in the table. See Transaction Codes under Academic Records on the Lists menu for more on transaction codes.

BOOK = Books
EXAMR = Exam Retake Fee
EXTCRSE = Course Extension Fee
EXTLSN = Lesson Extension Fee
INT = Interest
LESSONR = Lesson Retake Fee
REG = Registration Fee
TUIT = Tuition

Retake Indicator

Courses that are retaken: In the AdEnrollSched database file, the Retake indicator for the previous course will be an R. In the subsequent retake course, the Retake indicator will be an asterisk (*).

Staff Groups

The system requires certain staff groups. See Staff Maintenance Form for more on staff groups. The required staff groups are:

System Administrator
Director of Admissions
Admissions Reps
Financial Aid Advisors
Academic Advisors
Instructors
Placement Advisors

Status Categories

A - Active
C - Applicant Processing
E - Enrollment
G - Graduate - Placement
I - InSchool - Placement
L - Lead
N - Never Attended
P - Permanent Out
T - Temporary Out
W - NDS Never Attended
X - NDS Enrollment
Y - NDS Active
Z - NDS Permanent Out

Stipend Schedule Status Codes

Student Stipend Schedules are controlled by the user through hard coded status codes. Stipends are accessed through View > Financial Aid > Packaging or through View > Student Accounts > Stipend Schedule. Individual stipend disbursements can also be cancelled and "re-expected" while viewing the student's stipend schedule.

A - Approved (necessary to process disbursements)
C - Canceled
E - Estimated
H - Hold
P - Pending Approval

Student Status Codes

Student Status Codes are made up of a combination of school-defined descriptions and predetermined system codes. These codes are discussed in detail in Status Codes which is an option on the Setup menu.

Student Status Codes in a Class Section

C - Current
D - Dropped
P - Grade Posted

System-Required Student Master Fields

Some data entry fields on the student master form are required by CampusNexus Student. Data must be entered in these fields regardless of additional school requirements.

Last Name
First Name
Lead Date
Admissions Rep

Transaction Type (Code)

Financial transactions in the Student Accounts module are given a transaction type code. These codes appear on the Transaction Report.

C = Credits
P = Payments
D = Debits
I = Invoice

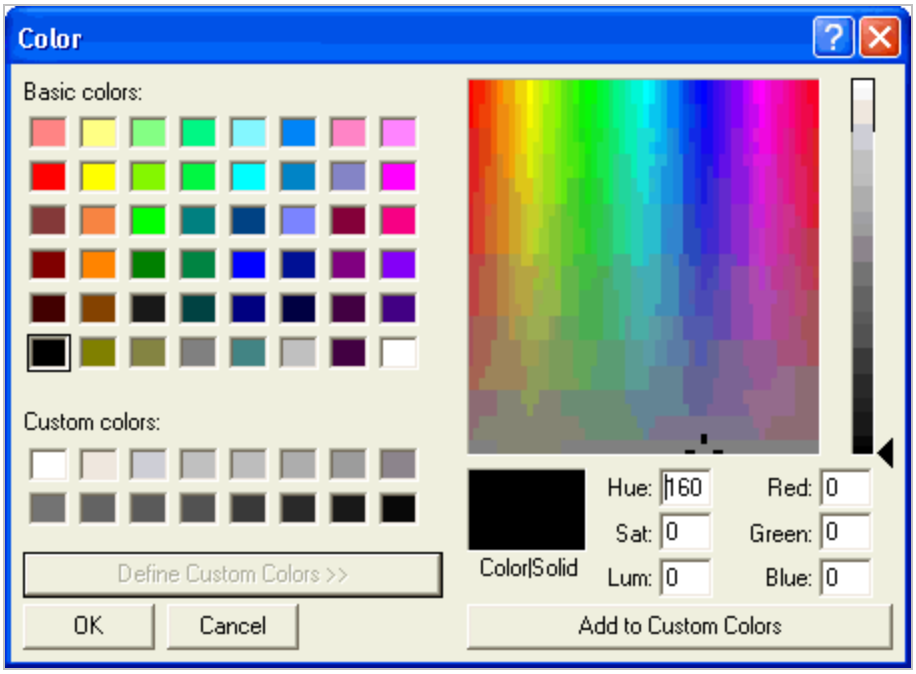
Set Background Color

The color of the work area field can be set to something other than the default.

To set the background color of the work area:

1. Right-click anywhere inside the work area.
2. When the pop-up menu is displayed, select **Set Background Color**. The follow form is displayed.

3. Select a background color by clicking the square with the desired color. If the color you desire is not displayed on the Color form, you can click the **Define Custom Colors** button to display an expanded form to use to define a specific color. You also have the option of adding your specific color to the **Custom colors** list by clicking the **Add to Custom Colors** button after you have defined your color.



4. Click **OK** to display the new color in the work area. This color will remain set for the user until changed by the user.

Shortcuts and Access Keys

This table is a list of frequently used key combinations. Some of them are specific to CampusNexus Student and some are commonly used in all Windows applications.

Shortcuts

Key	Description
Alt	Activate or inactivate menu bar mode.
Alt+Down Arrow	Opens a drop-down list when the list box has focus.
Alt+Tab	Display next primary window (or application).
Alt+Esc	Display next window.
Alt+Spacebar	Display the control panel menu for the main application window.
Alt+Enter	Display property sheet for current selection.
Print Screen	Capture desktop image to the Clipboard.
Alt+Print Screen	Capture active window image to the Clipboard.
Ctrl+.(period)	Print an image of the CampusNexus Student window.
Ctrl+E	Edit the data on a form.
Ctrl+F	Find a student, open search dialog.
Ctrl+F4	Close the active form.
Ctrl+L	Open the Quick Lead Entry form.
Ctrl+N	Start a new student master record.
Ctrl+P	Open the Print dialog box.
Ctrl+Q	Cancel the changes to the active form.
Ctrl+S	Save data on the active form.
Ctrl+Z	Restore previous data in a field before you save it or leave it.
Esc	Cancel
Ctrl+Esc	Access the Start button in taskbar.
F1	Open the CampusNexus Student Help Library.
F3	Go to the next student.
Alt+F4	Close the active window.
F5	Refresh the active form.
Alt+F6	Switch to next window within the application.

Key	Description
Shift+F10	Display popup menu.
Spacebar	Select (same as mouse button 1 click).

Windows Key Shortcuts

On many keyboards there is a pair of keys with Microsoft Windows icons on them. Typically, they are somewhere near the **Alt** and **Ctrl** keys. On notebook computers, one or more Windows keys may be located elsewhere on the keyboard.

There are several Windows key shortcuts that you can use to simplify various operations. Here is a list of the shortcuts and their effects.

Windows Keys

Key Combination	Effect
Windows Key	Displays taskbar and Start menu
Windows Key+E	Starts Windows Explorer
Windows Key+F	Finds files or folders
Windows Key+Ctrl+F	Finds a computer
Windows Key+M	Minimizes all windows
Windows Key+Shift+M	Restores all windows
Windows Key+R	Displays the Run dialog box
Windows Key+Tab	Cycles through the taskbar buttons
Windows Key+ Break	Displays the System Properties sheet

Accessibility Keys

Support for these key combinations and sequences is set by users with the Windows Accessibility Options. Pressing the combination for a particular mode toggles it from On to Off or Off to On, depending on which mode it is in when you press the keys.

- High Contrast Mode - **Left Alt + Shift Print Screen**
- MouseKeys - **Left Alt + Left Shift + Num Lock**
- StickyKeys - **Shift, Shift, Shift, Shift, Shift** (press the **Shift** key five consecutive times)
- FilterKeys (SlowKeys, RepeatKeys, and BounceKeys) - **Right Shift** held down for 8+ seconds
- ToggleKeys - **Num Lock** held down for 5+ seconds

Mouse Vs. Keyboard

CampusNexus Student accommodates the user who prefers to use his or her mouse while working with the program, as well as the user who prefers to use the keyboard rather than reach for the little creature beside it. Wherever possible the designers have

made both options available as you work. On menus and forms, look for the "shortcut keys" if you prefer selection from the keyboard. Otherwise, just click away.

Note: There are settings in Windows that causes the "shortcut keys" or (as Windows refers to them) "keyboard navigation indicators" to be hidden until you press the **Alt** key. To turn this option off (make your "shortcut keys" always visible, follow the steps below.

Windows 2000:

1. From the Windows **Start** button, select **Settings**, then select **Control Panel**.
2. Select the **Display** icon or option, then select the **Effects** tab.
3. Clear the check box labeled **"Hide keyboard navigation indicators until I use the Alt key."**
4. Click **OK** to save the change.
5. Close the Display and other windows until you are back on the desktop.

Windows XP:

1. From the Windows XP **Start** button, select **Control Panel**, and then select **Appearances and Themes**.
2. Select the **Display Icon**, and then select the **Appearances Tab**.
3. Click **Effects**.
4. Clear the check box labeled **"Hide underlined letters for keyboard navigation until I press the Alt key**."
5. Click **OK** to save the change.
6. Close the forms until you are back to the desktop.

In the Help system, whenever we say "click", for the sake of brevity, we really mean point to your desired option with your pointing device (mouse, trackball, slider pad, and so on) or select it using the keyboard.

In the illustration below, "S" is the shortcut key for opening the selected student's master record form.

Admissions View Menu

Use your pointing device (mouse) to select a folder:

1. For example, select the **View** option on the main menu at the top of the CampusNexus Student window.
2. Slide the pointer down to highlight the **Admissions** option.
3. Slide the pointer to the left to see the submenu.
4. Click (with the left mouse button) on a submenu option to see the related form.

To use your keyboard instead of your mouse:

When you see **"Alt+W"** or some other similar key combination, it means press and hold down the **Alt** key (either one) and, while holding Alt down, press the indicated letter (**W** in this example). Do not forget the arrow keys on your key board are great for moving between options. For another example in CampusNexus Student, when no other form has the focus (is currently active), pressing **Alt+F** will open the **File** menu. You can then use the arrow keys to move from one option or sub-option to another.

Another keyboard example:

1. Press the **Alt+V** key combination. The **View** menu will drop-down from the main menu.
2. Press **A** for Admissions. Alternatively, you could use the down-arrow key to highlight the Admissions option. The folder list will appear beside the View menu.
3. Type the underlined letter in the option you want to select.
4. Or, use your **down arrow** key to highlight the folder or form you want to view and press the**Enter** key to select the folder or form.

More About Pointing Devices and Keyboards

Please refer to your Windows User Guide or Help topics for more information on using the mouse or other pointing device and for tips on using the keyboard for selecting options and objects on the desktop and in application windows.

Shortcut Menus

CampusNexus Student often offers you shortcut menu when you right-click in a window or form. An example of a shortcut menu is shown below. This menu appears when you right-click any blank spot in the main CampusNexus Student work area.

Sequence of System Setup Procedures

The initial setup of CampusNexus Student must be done in an organized manner to ensure a successful start-up. The tables below provide guidance about the order in which the many parameters, variables, and tables can be approached.

Some of the more complex tables require references to entries in code lists that have already been populated with school-related data. For example, you cannot assign an instructor to a class section until the instructor is set up as a staff member. Many other such relationships exist between lists and tables. Where dependencies exist that do not follow the general schema of the installation procedure, it is so noted in the help text for the setup sequence.

It is important that you follow the setup sequence shown in the following topics.

1. The sequence begins with high-level system-wide utilities that are set up by the system administrator in the System Setup menu.
2. Functions that pertain to detailed reports, security and utilities are typically set up by the system administrator in the System Setup menu.
3. Functions that pertain to student and staff records of all kinds are set up by the system administrator in the System Setup menu.
4. Functions that pertain to reports, and lists and reports of all kinds are set up by the system administrator in the Lists menu. Academic Records are set up last because they depend on data and parameters in previously set up tiers.

Some lists and parameters are populated in one module but are also required in other modules. An example would be the Program code list which is set up in Academic Records. These codes are also referenced, with respect to a lead or a student, in Admissions and Financial Aid.

In the tables that follow, each module is represented. The modules are arranged in the suggested setup order. Within each module, the lists and system parameters are listed in the suggested setup order. If a particular list is not mentioned in the table, the setup order is not significant and can be handled as the need arises and time permits.

System-wide variables are those that pertain to the entire system. They are set by the system administrator using the System Settings form accessed from the Setup option on the main menu bar. CampusNexus Student provides default values for most of these fields. You can customize the values for your institution.

Generally, you can use whatever codes and descriptions are understood in your institutional environment. In some cases, such as student status codes, you must relate your codes and terminology to codes that CampusNexus Student understands. Examples of these parameters and lists can be found in other topics in the Help system. Click on a link in the table below to read the related Help topic.

Setup Sequence: System

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
1.	Setup	System-Wide Variables					
1.1	System.	Enter some basic information that will control your system.	Setup				

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
1.1.1	Company Name. Enter a corporate or company name.	This is the name that will appear in the title bar of the main CampusNexus Student window for all campuses. It is not the name of the campus, which is entered elsewhere.	Setup	System	Initial Setup	N/A	Corp
1.1.2	Student Groups by Campus. Select Yes or No.	Select Yes to limit the users to student groups for campuses to which the users have access.	Setup	System	Initial Setup	N/A	Corp
1.1.3	Required Fields Color. Select the background color of required fields to be shown on CampusNexus Student forms.	Some data is required by CampusNexus Student for proper operation. You can designate additional fields as required for your school.	Setup	System	Initial Setup	N/A	Corp
1.1.4	Language. Select the language to be used for field labels on forms.	The options are English, Spanish, and Other. If you select Spanish or Other, you may need to modify the label names in the data dictionary.	Setup	System	Initial Setup	N/A	Corp
1.1.5	Recent Student Count. Enter the number of student names to be shown in the drop-down list of recently accessed student records.	Twenty (20) seems to be a good round number.	Setup	System	Initial Setup	N/A	Corp

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
1.1.6	Form to Open. Select the form to open when a student is selected from the Recent Student list.	The options are Student Master form, current form, or none.	Setup	System	Initial Setup	N/A	Corp
1.1.7	Letter Path. Enter the directory path to letters used in CampusNexus Student.		Setup	System	Initial Setup	N/A	Corp
1.1.8	Custom Reports. Enter the path to be used to store custom reports designed for or by your school.	When a user selects a report from a button or menu option, CampusNexus Student will look first in this folder for a report file with the appropriate name (for instance, a customized transcript). If the program does not find such a report in your Custom Reports folder, it will look in the system reports folder.	Setup	System	Initial Setup	N/A	Corp
1.1.9	Use NT Security. Select Yes or No.	If you select Yes, persons who can log into your NT network are authorized to log into CampusNexus Student. See the Help topic for more details.	Setup	System	Initial Setup	N/A	Corp

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
1.1.10	Allow Duplicate SSNs. Select Yes, No Duplicates in Database, or No Duplicates in Campus.		Setup	System	Initial Setup	N/A	Corp
1.1.11	ID to Display. Select the student ID to be displayed on forms.	The options are Student ID, Enrollment ID, or SSN.	Setup	System	Initial Setup	N/A	Corp
1.1.12	Default ID on Reports. Select the student ID to be used as a default on reports.	The options are Student ID, Enrollment ID, or SSN.	Setup	System	Initial Setup	N/A	Corp
1.1.13	Search Results. Enter the maximum number of rows that the search procedure is to return when you use the student search procedure.	A zero in this field indicates that all matches are to be displayed in the resulting grid. This does not apply to the employer search tool.	Setup	System	Initial Setup	N/A	Corp
1.1.14	Default Search. Select the field in which the cursor will first appear when using the student search tool.	The options are Last Name, Student ID, Enrollment ID, or SSN.	Setup	System	Initial Setup	N/A	Corp
1.1.15	Report Time-Out. Enter the number of seconds that the report processor will wait for data to be collected before canceling the print job.		Setup	System	Initial Setup	N/A	Corp

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
1.1.16	Allow Global Search. Select Yes or No.	Allow Student search across all campuses in the system or limit the search to the Users campus list.	Setup	System	Initial Setup	N/A	Corp
1.1.17	Student Form. Select Short or Long.	Select the format of the student master form to use when adding or editing student data. The short format is shown in the display mode. The long form opens when adding or editing to accommodate additional code search features.	Setup	System	Initial Setup	N/A	Corp
1.1.18	Prevent Web Access. Select Yes or No.	Choose Yes to restrict Web Access and No to have Web Access. Yes will make the "Help on the Web" option on the Help Menu unavailable.	Setup	System	Initial Setup	N/A	Corp
1.1.19	Allow Dynamic GroupsSelect Yes or No.	Allow Student Dynamic Groups? If you select no, the pro-gram will not allow users to create dynamic student groups.	Setup	System	Initial Setup	N/A	Corp

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
1.1.20	File Server. Select the server where the CampusNexus Student shared folders reside.	Select the appropriate file server.	Setup	System	Initial Setup	N/A	Corp
1.2	Campus Locations. Refer to the related Help system topics for details.	Enter the names, addresses, and other data about your campus (es).	Setup	Campus - System-wide list	Initial Setup	N/A	Corp
1.3	Staff Groups.First, set up all the staff groups you think you are going to need.	You will have to assign each staff member to at least one group when you set them up.	Setup	System	Initial Setup	N/A	Corp
1.3.1	Staff. Enter data for as many staff members as possible and form appropriate staff groups.	A staff member can belong to more than one group.	Setup	System	Maintenance	3.16	Corp
1.4	Security.	Set up staff group security.	Setup	System		N/A	Corp
1.5	Status Codes.	Add or edit school terminology for student status codes. Includes the background colors on the student master form for the various statuses.	Setup	System	Initial Setup	N/A	Corp
1.6	Contact Manager Setup		Setup				Corp
1.6.1	Enable Contact Manager Security Policies. Check or clear this option as required.	See the Help topic for details.	Setup	System	Initial Setup	N/A	Corp

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
1.6.2	Policy Name. Add Contact Manager security policies for your staff groups.	See the Help topic for details.	Setup	System	Initial Setup	N/A	Corp
1.6.3	E-Mail. Enter information about your e-mail server and default return address.						
1.7	Admissions Settings		Setup				
1.7.1	Student ID Option. Select an option for your students' ID format.	Sequential number, School-Formatted ID, or no ID number.	Setup	System	Initial Setup	N/A	Corp
1.7.2	Student ID Format. If you elect to use a school-defined student ID format, select the components that make up the ID.	You can choose a combination of date, name, and numeric components for your school's student ID format.	Setup	System	Initial Setup	N/A	Corp
1.7.3	Student ID. You can enter the next sequential number to be assigned as a student ID. This number is used in either of the ID formats mentioned above.	CampusNexus Student does not allow duplicate student IDs to be assigned. If the next number in sequence has already been used, the program will skip over it.	Setup	System	Initial Setup	N/A	Corp

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
1.7.4	Duplicate Name/Phone. Select Yes or No.	If you select Yes, CampusNexus Student checks for duplicate entry of leads immediately after you enter a lead name and telephone number. If you select No, it waits until you save the lead entry form to check for duplicates.	Setup	System	Initial Setup	N/A	Corp
1.7.5	ISIR Settings. Enter the ISIR settings appropriate for your school.	See the Help topic for more details.	Setup	System	Initial Setup	N/A	Corp
	The lead's Social Security Number (SSN) is used as the matching criteria. If the ISIR Lead Flag is set to No, data from unmatched ISIRs is ignored and the other three ISIR-related options below have no affect on the system.	Setup	System	Initial Setup	3.12	Corp	
		Setup	System	Initial Setup	3.13	Corp	
		Setup	System	Initial Setup	1.3	Corp	

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
1.7.6	Master on Quick Lead. Set the default option to open or not open the Student Master after entering a quick lead.	Select Yes to open the student master form after entering a quick lead.	Setup	System	Initial Setup	N/A	Corp
1.7.7	Duplicate Lead Selection. Select Yes or No.	Allow user to select leads found during duplicate check that belong to campuses to which the user has no access?	Setup	System	Initial Setup		
1.7.8	Design The Quick Lead Form. The Additional tab contains a list of Quick Lead Template forms. You can design the Quick Lead forms for your school.	Select the fields for your Quick Lead forms and the order in which they are to appear.	Setup	System	Initial Setup	N/A	Corp
1.8	Financial Aid Settings		Setup				
1.8.1	Packaging. Enter the number of days to hold financial aid for first time students.		Setup	System	Initial Setup	N/A	Corp
1.8.2	Edit Detail Award Letter. Click this button to edit your detailed financial aid award letter in Microsoft Word.		Setup	System	Initial Setup	N/A	Corp
1.8.3	Edit Summary Award Letter. Click this button to edit your summary financial aid award letter in Microsoft Word.		Setup	System	Initial Setup	N/A	Corp

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
1.8.4	Edit Receipt Notification Report. Click this button to edit notices of financial aid receipt.	See details in the Help topic. This option requires access to Crystal Reports.	Setup	System	Initial Setup	N/A	Corp
1.8.5	General. You can set up fund source security, FAFSA controls, and FAGL functions.		Setup	System	Initial Setup	N/A	Corp
1.8.6	Clearinghouse. Indicate whether you are using the clearinghouse or not. If so, choose the reporting method and withdrawal date method.		Setup	System	Initial Setup	N/A	Corp
1.8.7	Direct Loan. If you school uses Direct Loans, enter the necessary data.	Direct Loan ID, drawdown requests, disclosure statements, etc.	Setup	System	Initial Setup	N/A	Corp
1.8.8	Pell	Disbursement Export. Include Disbursements at status "Scheduled" Yes/No. Disbursements Scheduled in the number of days - determine that number	Setup	System	Initial Setup	N/A	Corp
1.8.9	Hold Codes. Set up hold code options and signals.						
1.9	Student Accounts Settings		Setup				

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
1.9.1	Edit Enrollment Fees. Allow the user to edit the tuition, books, fees, etc., when the enrollment record is added?	Yes or No.	Setup	System	Initial Setup	N/A	Corp
1.9.2	Earnings Method. Select the method to be used for earning tuition.	None or Monthly.	Setup	System	Initial Setup	N/A	
1.9.3	Require Term Codes. Require term codes to be entered when posting charges and adjustments?	Yes or No.	Setup	System	Initial Setup	N/A	Corp
1.9.4	Delete Charges/Drop. Delete charges dated after drop date when dropping a student?	Yes or No.	Setup	System	Initial Setup	N/A	Corp
1.9.5	Delete Charges/No Show. Delete charges the charges from the ledger card when the student status is set to No Show or Cancel?	Yes or No.	Setup	System	Initial Setup	N/A	Corp
1.9.6	Revenue Reference Number. This number will be incremented and used as a reference when you command CampusNexus Student to generate revenue recognition transactions once a month.		Setup	System	Initial Setup	N/A	Corp

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
1.9.7	G/L Format. Enter the format of your general ledger account number.		Setup	System	Initial Setup	N/A	Corp
1.9.8	G/L Batch Number. Enter the next batch number to be used when preparing export batches from CampusNexus Student to your G/L system.		Setup	System	Initial Setup	N/A	Corp
1.9.9	Allow Posting. Choose to allow posting to any campus or to default campus only.		Setup	System	Initial Setup	N/A	Corp
1.9.10	Deposits Posting. Choose to allow deposit posting to any campus or to default campus only.		Setup	System	Initial Setup	N/A	Corp
1.9.11	GL/AP Package. Select the accounting package that is used in conjunction with CampusNexus Student.	At this time, the choices are Great Plains and Other. Note that SBT Pro Series is no longer supported in CampusNexus Student.	Setup	System	Initial Setup	N/A	Corp
1.9.12	GL Release Type. Select the type of transaction that is to be delivered to the accounting package.	The options are Detail and Summary.	Setup	System	Initial Setup	N/A	Corp

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
1.9.13	Integrate with Great Plains. Answer N/A, Yes, or No.	Does your CampusNexus Student system share data with Great Plains? In other words, will CampusNexus Student validate GP account numbers, pass transactions to GP, get data from GP for CampusNexus Student reports, and so on.	Setup	System	Initial Setup	N/A	Corp
1.9.14	Integrate Checks with Great Plains. Answer N/A, Yes, or No.	Does your CampusNexus Student system share data with Great Plains for printing accounts payable checks?	Setup	System	Initial Setup	N/A	Corp
1.9.15	Integrate Bank Reconciliation with Great Plains. Answer N/A, Yes, or No.	Are the refund and stipend checks printed in CampusNexus Student integrated into the Great Plains process for bank reconciliation.	Setup	System	Initial Setup	N/A	Corp

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
1.9.16	Apply Payment Flag. Should CampusNexus Student apply a payment to outstanding charges? Yes or No.	This option is a default. If you choose Yes, you can elect to not apply a payment at the time of the transaction. If you choose No, you can elect to apply a payment at the time of the transaction.	Setup	System	Initial Setup	N/A	Corp
1.9.17	Print Receipt Flag. Should CampusNexus Student print a receipt for payments received? Yes or No.	This option is a default. If you choose Yes, you can elect to not print a receipt at the time of the transaction. If you choose No, you can elect to print a receipt at the time of the payment transaction.	Setup	System	Initial Setup	N/A	Corp
1.9.18	Schedule Stipends?	Prevent Stipends if Institutional Charges> amount package?					Corp
1.9.19	Limit Stipend Amount? Prevent stipend amount scheduled from exceeding amount packaged for specified fund source?	Yes or No.					
1.9.20	Refund Calc Date. Which date should be used as the effective date when calculating refunds.	Drop Date or Last Date Attended.					

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
1.9.21	Disburse Stipends? Prevent Stipends if Fund Not Posted?	Yes or No.					
1.9.23	QT Default Bill Code. Assign a default billing code to imported QuickTouch transactions that have no billing code specified?	Yes or No.					
1.9.24	Bank Accounts. Select the default bank accounts for each campus. These are the accounts that will used (unless you choose a different one) when bank deposits are processed.	This option is under the Additional tab on the Student Accounts Settings form.	Setup	Campus	Initial Setup	4.2,1.1.1	Corp
1.9.25	G/L Link. Enter the general ledger account numbers that relate to the CampusNexus Student transaction codes.	This option is under the Additional tab on the Student Accounts Settings form.	Setup	Campus	Initial Setup	4.1,1.1.1	Corp
1.9.26	Revenue Tab. Select the format of the Revenue Recognition Report.	Detail or Summary.					
1.10.	Academic Records Settings	Set up some basic parameters concerning required data for start date, term code, rooms, enrollment number, and enrollment number format.	Setup				

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
1.10.1	Require Start Date. Require the use of the start date table for enrollment?	Yes or No.	Setup	System	Initial Setup	N/A	Corp
1.10.2	Require Term Code. Require terms for class schedules?	Yes or No.	Setup	System	Initial Setup	N/A	Corp
1.10.3	Require Rooms. Require rooms for class schedules?	Yes or No.	Setup	System	Initial Setup	N/A	Corp
1.10.4	Enrollment Number. Enter the next enrollment number.		Setup	System	Initial Setup	N/A	Corp
1.10.5	Enrollment Number Format. Design the format of your custom enrollment number.		Setup	System	Initial Setup	N/A	Corp
1.10.6	Custom Transcript. Select the file to be used when printing a transcript.						
1.10.7	Use Individual Custom Transcript? Select Yes or No.	Do you want to use the generic transcripts for individual students or your own custom transcripts?	Setup	System	Initial Setup	If yes, design transcript.	Corp
1.10.8	Use Batch Custom Transcript?Select Yes or No.	Do you want to use the generic transcripts for batches of students or your own custom transcripts?	Setup	System	Initial Setup	If yes, design transcript.	Corp

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
1.10.9	Hold Codes. Set up hold codes for student groups.	Hold codes can prevent students from being registered in class sections or from having transcripts printed.	Setup	System	Maintenance	Groups	Corp
1.10.10	Enrollment. Select forms to be displayed when enrolling students.	You can elect to see the document tracking, registration, enrollment fees, and/or ledger card forms in addition to the enrollment forms.	Setup	System	Initial Setup	N/A	Corp
1.10.8	OMR Scanning Setup. If your school will use a scanning device for attendance and grades, enter the necessary interface data.	Select form files and locations,COM port, and tardiness percentage.	Setup	System	Initial Setup	N/A	Corp
1.11	Distance Education Settings	Set up the payment schedule for DE instructors. Set charges for lessons by program or course. Set Hold Code Groups.	Setup				
1.11.1	Instructors. Enter payment scheduling information for your DE instructors.		Setup	System	Initial Setup	N/A	Corp
1.11.2	Program Rates. Enter student billing rates for your DE programs.		Setup	System	Initial Setup	2.17	Corp

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
1.11.3	Course Rates. Enter student billing rates for your DE courses.		Setup	System	Initial Setup	2.16	Corp
1.11.4	Hold Criteria. Enter the criteria for setting up hold groups.		Setup	System	Initial Setup	N/A	Corp
1.12	Career Services Settings	Select statuses for new Career Services masters and for placements.	Setup				Corp
1.13	Report Maintenance.	Use this option to customize generic CampusNexus Student reports for your school. This option requires access to Crystal Reports. See the Help topic for details.	Setup	System	Initial Setup	N/A	Corp
1.14	Web Interface.	If your school wishes to make CampusNexus Student data available to your students and staff, use this form to set it up. Anthology Inc. recommends that you consult with CampusNexus Student Support before attempting to set up this feature.	Setup	System	Initial Setup	N/A	Corp

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
1.15	Data Dictionary.	If your institution prefers different labels for data entry fields on forms, change the descriptions here. You can enter labels in languages other than English. Optional.	Setup	System	Initial Setup	N/A	Corp
1.16	School-Defined Fields.	You can set up fields for data that is unique to your institution here. Optional.	Setup	System	Initial Setup	N/A	Corp
1.17	Required Fields.	Review the required data entry fields list for the Student Master form and other forms. Some fields are required by the CampusNexus Student system and others may be optionally required by your school.	Setup	System	Initial Setup	N/A	Corp
1.18	Field Level Security.	Review the Student Master form for necessary field level security.	Setup	System	Initial Setup	N/A	Corp

Setup Sequence: Academic Records

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
2.	Acad. Records Lists						

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
2.1	Calendar. Define your school calendar of holidays and other non-attendance periods. It is wise to extend the calendar into the future at least a year past the length of your longest program.	The calendar can be defined for each campus and each shift (day, night, weekend, distance learning, etc.)	Lists - Acad. Records	Campus	Maintenance	N/A	Campus
2.2	Course Type. Define the types of courses offered in your programs.	Lecture, lab, distance, etc.	Lists - Acad. Records	System	Initial Setup	N/A	Corp
2.3	Course Categories. Define the course categories for your program versions.	Core, Elective, etc.	Lists - Acad. Records	System	Maintenance	N/A	Corp
2.4	Degree. Define the degrees offered by your institution.	AA, BA, MBA, etc.	Lists - Acad. Records	Campus Group - system-wide list	Maintenance	N/A	Corp
2.5	Enrollment Status. Define the various enrollment statuses that apply to your students.	Full time, 3/4 time, half time, less than half time, etc.	Lists - Acad. Records	System	Fixed	N/A	Corp
2.6	Grade Level. Define the grade levels that apply to your students.	These will correspond to Dept. of Ed. codes for FA.	Lists - Acad. Records	System	Fixed	N/A	Corp
2.7	Grade Scale. Define one or more grading scales for your programs.	Includes GPA points, etc.	Lists - Acad. Records	Campus Group - system-wide list	Initial Setup	N/A	Corp

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
2.8	Honors. Define any honors codes to be related to students.	Summa Cum Laude, Dean's List, etc. See also Posting Honors.	Lists - Acad. Records	Campus Group - system-wide list	Maintenance	N/A	Corp
2.9	Period. Define the daily class room periods used in your institution.	Example: Day1 =8:00 A.M., 50 minutes, 1st Period of the day shift.	Lists - Acad. Records	System	Maintenance	N/A	Campus
2.10	Program Group. Aka "Interests". Define groups of programs.	Examples: Business Administration, Medical Tech, Dental Tech, etc.	Lists - Acad. Records	System	Maintenance	N/A	Corp
2.11	Reasons. Define reason codes to be related to student status changes.	Medical, incarcerated, military duty, etc.	Lists - Acad. Records	Campus Group - system-wide list	Initial Setup	1.5	Corp
2.12	Resources. Define codes for resources available in class rooms and required by class sections.	Personal Computers, projectors, TV, etc.	Lists - Acad. Records	Campus	Maintenance	N/A	Campus
2.13	SAP. Satisfactory Acad.Progress. Set up tables of parameters for measuring SAP.	Can be different tables for different programs.	Lists - Acad. Records	System	Initial Setup	1.5	Corp
2.14	SAP Status. Set up student statuses for those not making SAP.	There is one system SAP status code for students who are making SAP and one system status code for those who are not. You can add other codes for those who are not making SAP.	Lists - Acad. Records				

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
2.15	Shifts. Define the portions of the day or week when students will be attending classes.	Examples: Day, Night, Weekend, Distance.	Lists - Acad. Records	Campus Group - System-wide list	Initial Setup	N/A	Corp
2.16	Term. Define the start and end dates of each term, semester, quarter, etc. for each campus and each shift.	It is possible to define a perpetual term with no start and end dates.	Lists - Acad. Records	Campus - System-wide list	Maintenance	N/A	Campus
2.17	Courses. List all courses offered by your institution. The courses will, in turn, be incorporated into programs.	Requires codes from Course Types, Transaction Codes (set up in Student Accounts), and Books (set up in Bookstore Inventory).	Lists - Acad. Records	Campus - System-wide list	Maintenance	2.2, 1.1.1, 2.12, 6.1	Campus
2.18	Course Categories. Setup categories of courses such as core and elective.						

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
2.19	Programs. List all programs offered by your institution. Programs are sub-defined into Program Versions that are composed of groups of required and elective courses. After you set up the program version, you would attach a course list, apply entrance tests, documents, costs, program start date, and distance education parameters. You can also copy program versions to create a similar new version.	Requires codes from the following tables:	Lists - Acad. Records	System	Maintenance	See below	Corp
		Courses	Lists - Acad. Records			2.16	
		Degrees	Lists - Acad. Records			2.4	
		Program Groups	Lists - Acad. Records			2.10	
		Grade Scale	Lists - Acad. Records			2.7	
		SAP Tables	Lists - Acad. Records			2.13	
		Shifts	Lists - Acad. Records			2.14	
		Entrance Tests (Admissions)	Lists - Acad. Records			3.6	

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
		Documents (Contact Mgr.)	Lists - Acad. Records			7.4	
		Transaction Codes (Student Accounts)	Lists - Acad. Records			4.1	
2.20	Buildings/Rooms. Enter data identifying the buildings and rooms on your campus (es).	This data is used when assigning rooms to class sections. Set up each building on your campus(es) in which classes are held. For each building, set up the related rooms.	Lists - Acad. Records	Campus	Maintenance	2.12	Campus
2.21	Schedule Classes. From the Daily menu, select Administration, then Schedule Classes. Enter your class schedule for current and future terms.	This procedure requires data from several lists including:	Lists - Acad. Records	Campus	Maintenance	See Below	Campus
			Lists - Acad. Records	Terms			
		Courses	Lists - Acad. Records				
		Instructors	Lists - Acad. Records				
		Buildings	Lists - Acad. Records				
		Rooms	Lists - Acad. Records				

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
		Periods	Lists - Acad. Records				
2.22	Start Dates. After you set up your program versions, enter the dates on which they will start.	This form provides an easy way to select multiple program versions that start on the same date.	Lists - Acad. Records	Campus	Maintenance	2.17	Campus

Setup Sequence: Admissions

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
3.	Admissions Lists						
3.1	Citizenship. Enter the types of citizenship that describe your students: U. S. Citizen, Eligible Non-citizen, etc.		Lists - Admissions	System	Initial Setup	N/A	Corp
3.2	Colleges. Enter the names and addresses of other colleges attended by your students.		Lists - Admissions	System	Maintenance	N/A	
3.3	Counties. Enter the counties from which your students are drawn.		Lists - Admissions	System	Initial Setup	N/A	
3.4	Countries. Enter a list of countries to be used in student records.	These codes will be related to various student addresses.	Lists - Admissions	System	Initial Setup	N/A	Corp
3.5	Education Level. Enter prior education levels to describe your leads and students.		Lists - Admissions	Campus Group - system-wide list	Initial Setup	N/A	Corp

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
3.6	Entrance Tests. Enter the parameters for entrance tests required by your institution.	Also used when setting up programs in Acad. Records.	Lists - Admissions	Campus Group - system-wide list	Initial Setup	N/A	Corp
3.7	Ethnic Codes. Enter a list of ethnic codes used in your institution. This is used on the IPEDS report.		Lists - Admissions	System	Initial Setup	N/A	Corp
3.8	Extra-Curricular. Enter extra-curricular activities in which your students may participate.	Note that by changing the label in the data dictionary, you can use this field for some other purpose.	Lists - Admissions	System	Initial Setup	N/A	
3.9	Gender. Enter a list for male, female, and unknown.		Lists - Admissions	System	Initial Setup	N/A	Corp
3.10	High Schools. Enter names, addresses, and contacts for high schools from which your students are selected.	The High Schools list is located on the Daily / Admissions menu for the convenience of the Admissions staff. The data in this list is very volatile. Additions and changes are made frequently.	Lists - Admissions	Campus Group - system-wide list	Maintenance	N/A	Campus
3.11	Lead Categories. See the Daily / Admissions menu. Enter groups for the lead sources used by your institution, i.e., newspaper, TV, radio, seminar, etc.	Must be populated before Lead Sources are entered.	Lists - Admissions	System	Initial Setup	N/A	Corp

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
3.12	Lead Sources. Enter specific lead sources, New York Times, Dec. 12th seminar at Lincoln High School, etc.		Lists - Admissions	Campus Group - system-wide list	Maintenance	N/A	Campus
3.13	Lead Type. Enter types of leads that apply to your school. This is a general classification that can be used for reporting lead activity.		Lists - Admissions	System	Initial Setup	N/A	
3.14	Marital Status. Enter codes for single, married, etc.		Lists - Admissions	System	Initial Setup	N/A	Corp
3.15	Nationality. Enter a list of nationalities from which your students originate. This may help the staff in evaluating qualifications and requirements for enrollment.		Lists - Admissions	System	Initial Setup	N/A	Corp
3.16	Rep Type. Enter a list of admissions representative types. One type code will be assigned to each rep.	Optional. In-house, Traveling, High School, etc. Set up these codes before adding admissions reps to the staff member list.	Lists - Admissions	System	Initial Setup	N/A	Corp
3.17	States. Enter a list of states, provinces, etc.	This table comes with U. S. Postal codes already entered.	Lists - Admissions	System	Initial Setup	N/A	Corp

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
3.18	Titles. Enter a list of titles for students and staff members such as Mr., Ms., Mrs., and Dr.	These titles will be available for use in correspondence.	Lists - Admissions	System	Initial Setup	N/A	Corp
3.19	Agency Type. Enter codes to classify the types of agencies with which your school and students interact.	For example, federal, state, private, and so on.					
3.20	Agencies		Daily - Admissions	Campus Group - system-wide list			

Setup Sequence: Student Accounts

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
4.	Student Accounts Lists						
4.1	Transaction Codes. Define transaction codes that will be used through out the institution for posting charges, payments, and adjustments to student accounts.	Enter the default GL account number for each transaction code.	Lists - Student Accounts	Campus Group - system-wide list	Initial Setup	N/A	Corp
4.2	Bank Codes. Enter bank and bank account identifications.	Enter the default GL account number for each bank account.	Lists - Student Accounts	Campus	Initial Setup	N/A	
4.3	Billing Methods. Select the tuition billing method that is used at your school and fill in the grid if necessary.		Lists - Student Accounts	System	Initial Setup	4.1	Corp

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
4.4	Programs (Version Costs). Enter the costs for each program version if your costs are determined at the program version level.		Lists - Student Accounts	Program	Initial Setup	4.3, 4.6	Corp
4.5	Credit Card Types. Enter any credit card types that your school accepts.	CampusNexus Student provides for validation of some standard credit cards when used. Other cards may be entered but the system will not attempt to validate them when used.	Lists - Student Accounts	Campus	Initial Setup	N/A	Corp
4.6	Earnings Methods. Set up the methods by which you will "earn" tuition and prorated revenue.		Lists - Student Accounts	Campus	Initial Setup	N/A	Corp
4.7	Refund Policies. Set up the policies under which you will refund money to fund sources when a student drops.		Lists - Student Accounts	System	Initial Setup	4.1, 5.1	Corp

Setup Sequence: Financial Aid

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
5.	Financial Aid Lists						
5.1	Fund Sources. Enter sources from which your students receive financial aid funds. Pell, Stafford, PLUS, and so on.	Fund Source entries include selections from the other FA tables.	Lists - Financial Aid	Campus Group - system-wide list	Maintenance	5.2, 1.9.21	
5.2	Lenders. Enter lenders from which your students obtain loans. Also includes servicers and guarantors.		Lists - Financial Aid	System	Maintenance	N/A	Corp

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
5.3	Packaging Statuses. Enter your school's definition of packaging statuses.		Lists - Financial Aid	System	Initial Setup	N/A	Corp
5.4	Packaging Methods. Enter your packaging methods.	Specifies details about each FA source such as gift aid maximum, self-help maximum, minimum amount of aid, maximum amount of aid, minimum EFC, and maximum EFC.	Lists - Financial Aid	Campus	Initial Setup	5.1	Campus
5.5	Budgets. Enter the cost of attendance budgets used by your school.	Multiple programs can use the same COA budget.	Lists - Financial Aid	Campus	Initial Setup	Programs	Campus
5.6	Acad.Years. Define your Acad.years in terms of weeks or hours.	The same Acad.year codes can be used for multiple program versions. You must also set up the default number of disbursements for the various types of fund sources.	Lists - Financial Aid	System	Initial Setup	N/A	Corp
5.7	Programs. For each program version, set up the Acad.calendar, payment methodology, and so on.	Several variables are entered here that have a bearing on financial aid.	Lists - Financial Aid	System	Maintenance	5.6, 2.17	Corp
5.8	FA G/L Funds. Set up the chart of accounts for your Financial Aid General Ledger.	CampusNexus Student provides a default chart of accounts but you may wish to modify it.	Lists - Financial Aid	System	Initial Setup	N/A	Corp

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
5.9	Disbursement Schedules. Set up disbursement schedules that are related to campuses and fund sources.		Lists - Financial Aid	Campus	Initial Setup	N/A	Corp
5.10	Packaging Status Promotion. Set up your optional packaging status promotion codes.		Lists - Financial Aid				

Setup Sequence: Bookstore

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
6.	Bookstore Lists		Lists - Financial Aid				
6.1	Inventory. Add your books and supplies inventory here. Includes titles, authors, ISBN, cost, price, courses, etc.	Items listed here are used when setting up courses.	Lists - Bookstore	System	Maintenance	N/A	

Setup Sequence: Contact Manager

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
7.	Contact Manager Lists						
7.1	Activities. Enter your initial list of student-related activities in which staff members will engage.	Examples of activities include phone calls, interviews, send letter, and so on.	Lists - Contact Manager	Campus Group - system-wide list	Maintenance	7.4	Campus

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
7.2	Activity Status. Define a set of activity status codes.		Lists - Contact Manager	System	Initial Setup	N/A	
7.3	Activity Results. Define a set of activity results codes.		Lists - Contact Manager	System	Initial Setup	N/A	
7.4	Documents. List your initial set of documents to required of your leads and students.	Note that document requirements for all modules are listed here. Each document is designated as required by one department.You can also assign documents to be required for a program but they are defined here.	Lists - Contact Manager	Campus Group - system-wide list	Initial Setup	2.17	
7.5	Document Lists. Set up lists of documents that are required from students.	The documents on the lists are selected from the previously set up document codes.					
7.6	Document Status. Define a set of document status codes.		Lists - Contact Manager	System	Initial Setup	N/A	Corp
7.7	Address Types. Enter a list of student address classifications.		Lists - Contact Manager	System	Initial Setup	N/A	Corp
7.8	Visas. Enter Visa codes for international students in addition to the system codes already provided.	Other visa types not used by the SEVIS system. SEVIS visa types are already included in the table.	Lists - Contact Manager	System	Initial Setup	N/A	Corp

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
7.9	Edit Letters. Set up standard letters in Word for mail merge operations.	Letters must be defined as an activity under setup item 7.1 before you create them. After a letter is added to the Activities list use the Daily menu. Select Contact Manager, then select Print Letters. Edit the letter you want to create or change. If the letter is not on file, the program will ask if you want to create it. The program opens MS Word to work with the letters.	Lists - Contact Manager	System	Maintenance	7.1	

Setup Sequence: Placements

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
8.	Placement Lists						
8.1	Industry. This table already contains the Department of Labor SIC codes.		Lists - Placement	System	Initial Setup	2.17	Corp
8.2	Location. Enter the location of employers and jobs served by your institution.		Lists - Placement	System	Initial Setup	N/A	Campus

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
8.3	Corporate. Consolidated Employers to which local employer branches are linked.		Lists - Placement	System	Maintenance	N/A	Campus
8.4	Contact Type. Typical titles or positions of employer contacts.		Lists - Placement	System	Initial Setup	N/A	Campus
8.5	Skills. Special skills acquired by your students and desired by your employers.		Lists - Placement	System	Initial Setup	N/A	Campus
8.6	Job Category. Types of jobs in which your students may be placed. Used for summary reporting.		Lists - Placement	System	Initial Setup	N/A	Corp
8.7	Job Title. Titles of jobs offered by your employers. Classified by Job Category.	Complete your list of job categories before doing job titles.	Lists - Placement	System	Initial Setup	N/A	Campus

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
8.8	Job Type. Add user-defined job type statuses that are defined by one of two Types. These types are system codes that cannot be modified. You can define Code, Description, and Job Type.	Type is a drop-down list including Employment and Internship / Externship.					
8.9	Reasons. The campus-specific Reasons table gives you the ability to attach a reason to each change of placement status for each student at each campus.	The Status list box will show statuses in the Graduate Placement category.					
8.10	How Placed. Add user-defined how-placed statuses that are defined by one of three Types.	Types are system codes and can-not be modified. They include C - College, S - Self, and O - Continuing Employment/Education.					
8.11	Placement - Employers		Daily - Placement	Campus Group - system-wide list			Campus

Setup Sequence: Loan Management

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
9.	Loan Management Lists						
9.1	Loan Status. You can add additional school-defined loan status codes to the provided types of loan statuses.	The provided Loan Status codes include Attending, Default, Deferment, Delinquent, Forbearance, Grace Period, and Repayment. Of these codes, Attending, Grace, and Repayment are System codes which means that they are not available for modification or deletion.					

Setup Sequence: Student Services

	Setup Item	Description	Menu Location	Scope	Type	Depends on	Corporate / Campus Control
10.	Student Services Lists						
10.1	Room Type. Enter the room types for on-campus and off-campus housing tracked by your campus.						
10.2	Location. Enter the location of the housing and room numbers.						

What is Replication?

Replication is making copies of data, moving those copies to different locations, and synchronizing the data automatically so that all copies have the same data values. Replication can be implemented between databases on the same server or between different servers connected by LANs, WANs, or the Internet. See also Campus Options, CampusNexus Student and Replication, Configuring Replication for CampusNexus Student, Planning Replication for CampusNexus Student, and Report Selection.

Benefits of Replication

Replication offers various benefits depending on the type of replication and the options you choose, but the common benefit of SQL Server 2000 replication is readily available data when and where it is needed.

Benefits include:

- Allowing multiple sites to keep copies of the same data. This is useful when multiple sites need to read the same data or need separate servers for reporting applications.
- Separating online transaction processing (OLTP) applications from read-intensive applications such as online analytical processing (OLAP) databases, data marts, or data warehouses.
- Allowing greater autonomy. Users can work with copies of data while disconnected and then propagate changes they make to other databases when they are connected.
- Separating data to be browsed or for reporting so as not to slow down the original database.
- Increasing aggregate read performance.
- Bringing data closer to individuals or groups. This helps to reduce conflicts based on multiple-user data modifications and queries because data can be distributed throughout the network, and you can partition data based on the needs of different business units or users.
- Using replication as part of a customized standby server strategy. Replication is one choice for standby server strategy. Other choices in SQL Server 2000 include log shipping and failover clustering, which provide copies of data in case of server failure.

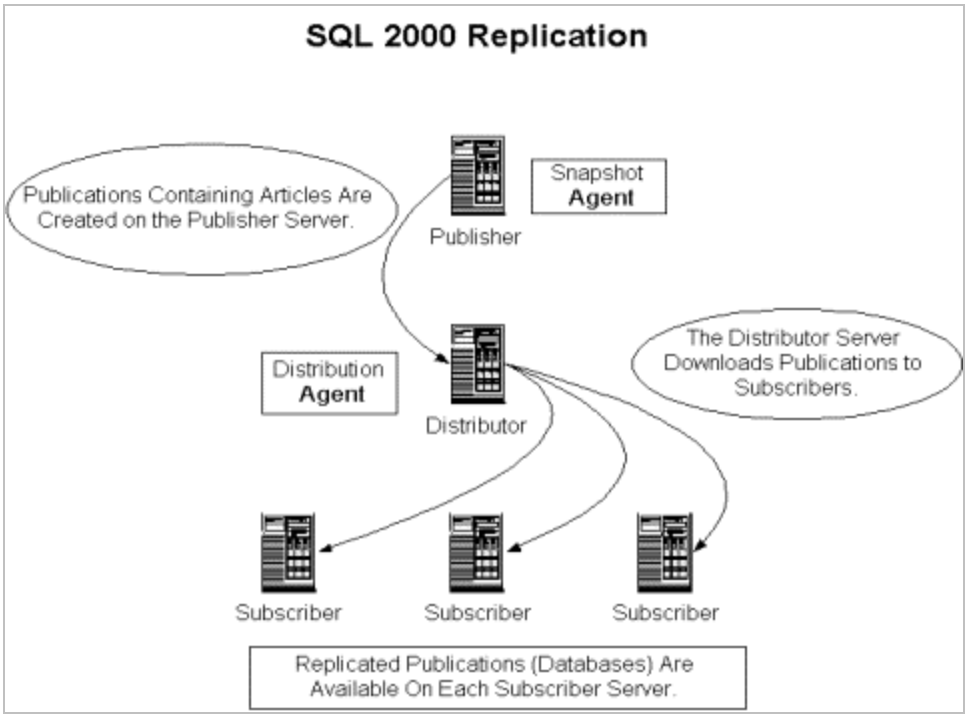
When to Use Replication

Diverse hardware and software applications in distributed environments with various needs for autonomy and data consistency make it necessary to store data redundantly. Replication is a solution for a distributed data environment when you need to:

- Copy and distribute data to one or more sites.
- Distribute copies of data on a scheduled basis.
- Distribute data changes to other servers.
- Allow multiple users and sites to make changes then merge the data modifications together, potentially identifying, and resolving conflicts.
- Build data applications that need to be used in online and offline environments.
- Build Web applications where users can browse large volumes of data.
- Optionally make changes at subscribing sites that are transparently under transactional control of the Publisher.

Replication Model

Microsoft® SQL Server™ 2000 replication uses a publishing industry metaphor to represent the components and processes in a replication topology. The model is composed of the following: Publisher, Distributor, Subscribers, Publications, Articles, and Subscriptions.



Several replication processes are responsible for copying and moving data between Publisher and Subscriber. These are Snapshot Agent, Distribution Agent, Log Reader Agent, Queue Reader Agent, and Merge Agent.

Publisher

The Publisher is a server that makes data available for replication to other servers and has one or more publications, each representing a logically related set of data. In addition to being the server where you specify which data is to be replicated, the Publisher also detects which data has changed during transactional replication and maintains information about all publications at that site.

Distributor

The Distributor is a server that stores history data and/or transactions and metadata. The role of the Distributor varies depending on which type of replication you implement. A remote Distributor is a server that is separate from the Publisher and is configured as a Distributor of replication. A local Distributor is a server that is configured to be both a Publisher and a Distributor of replication.

Subscribers

Subscribers are servers receiving replicated data, they subscribe to publications, not individual articles within a publication. They subscribe only to the publications that they need, not all publications available on a Publisher. The Subscriber can propagate data changes back to the Publisher or republish the data to other Subscribers with the appropriate options set.

Publication

A publication is a collection of articles from one database. This grouping of articles makes it easier to specify a logically related set of data and database objects that you want to replicate together.

Article

An article is a table of data, a partition of data, or a database object that is specified for replication. An article can be an entire table, certain columns (using a vertical filter), certain rows (using a horizontal filter), a stored procedure or view definition, the execution of a stored procedure, a view, an indexed view, or a user-defined function.

Subscription

A subscription is a request for a copy of data or database objects to be replicated and defines what publication will be received, where, and when. Synchronization or data distribution of a subscription is requested by the Publisher (a push subscription) or the Subscriber (a pull subscription).

Types of Replication

Snapshot Replication

Note: Snapshot Replication is used to initialize Subscriber databases at start-up and when Subscribers are restarted after installation of CampusNexus Student upgrades.

Snapshot replication is the process of copying and distributing data and database objects exactly as they appear at a moment in time. Subscribers are updated with a complete refresh of the data set and not individual transactions and therefore no monitoring is required. Because snapshot replication replicates an entire data set at one time, it may take longer to propagate data modifications to Subscribers and is typically replicated less frequently than other types of publications.

Transactional Replication

Note: Transactional Replication is the type recommended for use with CampusNexus Student.

Initially a snapshot of data is propagated to Subscribers; thereafter when data modifications are made just the individual transactions are captured and propagated to Subscribers.

SQL Server 2000 monitors INSERT, UPDATE, and DELETE statements, and changes to stored procedure executions and indexed views. SQL Server 2000 stores the transactions affecting replicated objects and then it propagates those changes to Subscribers continuously or at scheduled intervals. Transaction boundaries are preserved. If, for example, 100 rows are updated in a transaction, the entire transaction with all 100 data modifications are accepted and propagated to Subscribers or none of them are. When all changes are propagated, all Subscribers will have the same values as the Publisher.

Merge Replication

Note: CampusNexus Student does not support Merge Replication.

Merge replication allows various sites to work autonomously (online or offline) and merge data modifications made at multiple sites into a single, uniform result later. The initial snapshot is applied to Subscribers and then SQL Server 2000 tracks changes to published data at the Publisher and at the Subscribers. The data is synchronized between servers at a scheduled time or on demand. Updates are made independently (no commit protocol) at more than one server, so the same data may have been updated by the Publisher or by more than one Subscriber. Therefore, conflicts can occur when data modifications are merged.

Merge replication includes default and custom choices for conflict resolution that you can define when you configure a merge publication. When a conflict occurs, a resolver is invoked by the Merge Agent to determine which data will be accepted and propagated to other sites.

Options available with merge replication include filtering published data horizontally and vertically, including join filters and dynamic filters, using alternate synchronization partners, optimizing synchronization to improve merge performance, validating replicated data to ensure synchronization, and using attachable subscription databases.

Replication Data Considerations

Special considerations should be taken when publishing certain data types and properties. This section identifies those data types and properties, and it describes solutions for managing them, including:

1. Identity range management. Specifying identity range management can help you control how data modifications are made at different Subscribers during merge replication or during snapshot or transactional replication with updatable subscriptions.
2. Data types with specific uses. Different data types such as **uniqueidentifier** and **timestamp** have specific uses during replication processing, including conflict resolution when changes to the same data are made at multiple servers.
3. NOT FOR REPLICATION. Using the NOT FOR REPLICATION option allows you to implement ranges of identity values in a partitioned environment.

Replication

CampusNexus Student is a complex application that has a large database composed of many tables, indexes, stored procedures, and views. The database tables are constantly being updated with new information during your business operations. There is a constant demand on your network resources for quick responses to user activity.

One way to reduce the load on your SQL server is to transfer some of the less urgent requests for data to another server. The most obvious example of this situation is report production. A lengthy report, when it is created directly from the CampusNexus Student database, can consume precious system resources. Response time for transaction processing can suffer while large reports are being processed.

Replication offers a solution to this dilemma. In most cases, it is acceptable to generate reports from data that is up to a few hours old. This means that the reports can be created from a recent copy of the master database stored on another server.

If this is the case in your institution, consider our discussion of replication using Microsoft SQL Server.

In the replication environment we are suggesting here, the database tables from CampusNexus Student are copied to another server. Setup parameters in CampusNexus Student tell the system, by default, where to get reporting data. In exceptional cases, you can configure individual reports to indicate where the data should come from– the live database or the reporting database.

Replication, as proposed for use with CampusNexus Student, is a one-way, read-only process. Users can generate reports from the report server but they cannot update the reporting database. Updates are performed on the live (master) database.

Reporting and updating are essentially transparent to CampusNexus Student users. The only exception to this is the refresh delay on the report server. For instance, if a user posts a tuition payment to a student's ledger card and then runs a Cash Receipts report from the replicated database, the payment will not be reflected on the report until the next refresh. The delay in receiving data for the reports is based on the time interval of the replication. Your system administrator sets the refresh interval based on your school's needs.

Note: You can set up your Cash Receipts report (or any report) to use the "live" database rather than the "replicated" database.

Planning Replication

With new releases and service packs, there are often changes to the structure of database tables. Replication must be interrupted during the installation of new releases and service packs, restarted, and a new "snapshot" of the database distributed to all subscribers for proper replication of tables. Let your Anthology Inc. Support Representative know that your school is using replication before new CampusNexus Student releases and/or service packs are installed.

To enhance performance, consideration should be given to the methods and options used in replication design. Anthology Inc. encourages you to contact us for assistance in planning CampusNexus Student replication.

Servers

Anthology Inc. **requires** that your environment includes at least two servers running Microsoft SQL Server 2000: one server for the publisher and distributor, another for the subscriber.

The Publisher contains the master CampusNexus Student database and is subject to constant transaction traffic. In large institutions it may be beneficial to minimize the load on the Publisher by placing the Distributor on another server as it requires resources to download transaction activity to Subscribers. Placing the Distributor on the same server as the Subscriber may cause errors in the event of system failure and is to be avoided.

Publication Articles

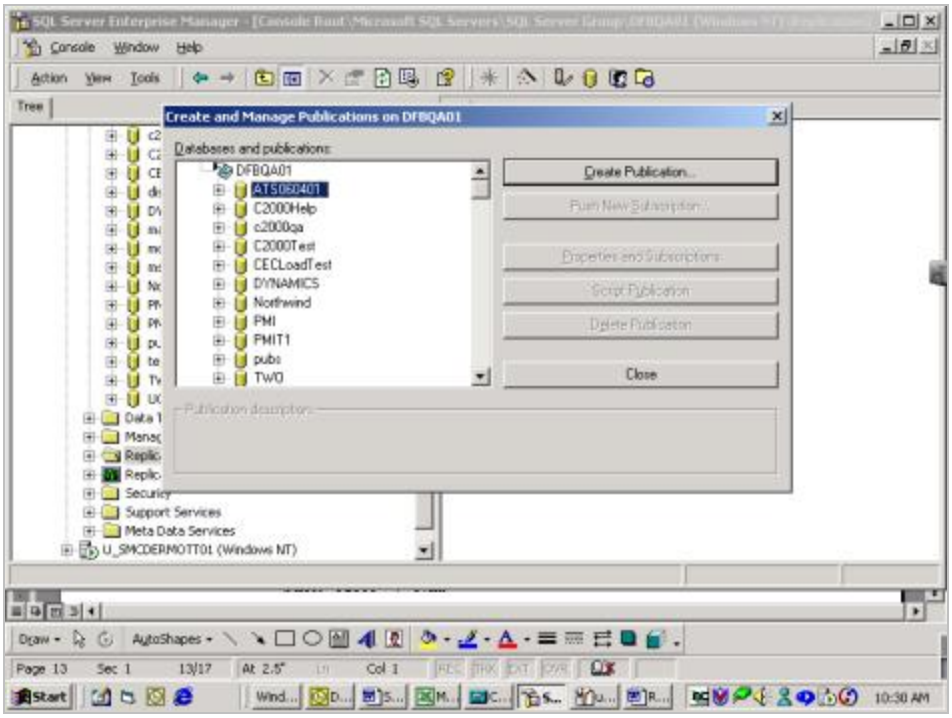
Tables and other database objects (views, stored procedures, etc.) are grouped and published as Articles. Although our default configuration replicates one copy of the entire database to another server, this default can be modified to suit specific needs. For example, an article could be published with only the tables necessary to run a particular report or group of reports. Additionally, articles can be published with tables selected according to the interval for updating or if replicated to multiple servers.

Transactional Replication Intervals

CampusNexus Student supports transactional replication. The intervals in which the subscriber data is updated may be set to continuously or according to a schedule depending on whether the data requires frequent or constant updates. The size of the data and length of time to complete an update may also affect the interval, or whether the data needs to be updated at multiple servers.

Configuring Replication

1. Open Enterprise Manager.
2. Configure the Distributor (transaction handler):
    a. Select the original database server to copy from. Select **Tools > Replication > Configure Publishing, Subscribers, and Distribution...**.
    b. Use the server as its own distributor, "Next"
    c. Specify the default snapshot folder, "Next"
    d. Customize Configuration: select default settings, "Next"
    e. "Finish" This will take a few moments while your distributor is configured.
3. Configure the Publisher (source database):
    a. Select the original database server to copy from. Select **Tools > Replication > Configure Publishing, Subscribers, and Distribution...**.
    b. Select the Publishers: check source database servers you want to replicate.
4. Configure the Subscriber (target database):
    a. Select the original database server to copy from. Select **Tools > Replication > Configure Publishing, Subscribers, and Distribution...**.
    b. Select the Subscribers: check target database servers you want to replicate.
5. Create a Publication:
    a. From the tools menu on the Publisher Server, select **Replication > Create and Manage Publications > Create Publication**.
    b. Select the database to publish ("CampusNexus Student")



c. Check the "show advanced options" on the first screen. Click "Next".

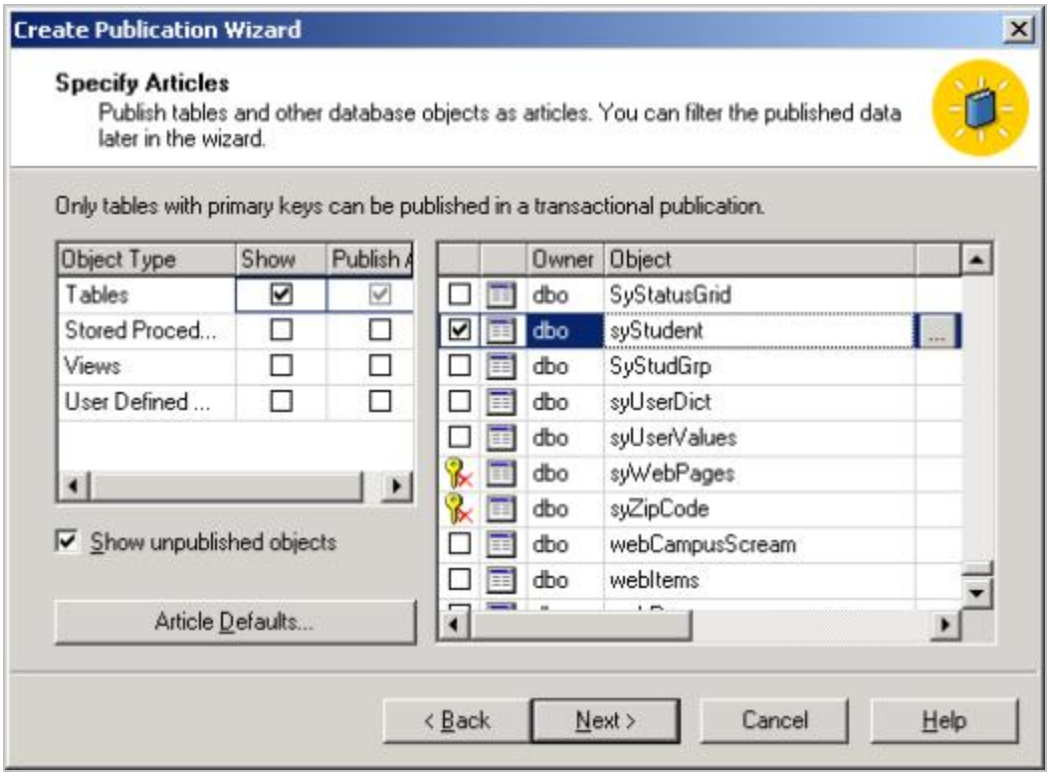
d. Select "CampusNexus Student" (or your database name) > "Next"

e. Select Publication Type Transitional > "Next" (Transitional publication supports automatic updating of data from the source Publisher to target Subscriber)

f. Check Immediate updating > "Next".

g. Select the type of servers you are using. Select SQL 2000.

h. Select the CampusNexus Student tables. Check **Tables** and **Publish All**. If desired, filters on the tables can setup later in the procedure. "Next"



A form with Article issues (ignore) is displayed:

- Time stamp: Used to track changes to the replicated data.
- Identity Columns: An IDENTITY property to a column automatically generates unique sequential incrementing numbers for new rows inserted into a table. This generation occurs at the publisher, therefore the identity property is not transferred to subscribers.
- Next.

i. Enter a name for the Publication. Use "CampusNexus Student" (or the name of your database). "Next".

j. Select "No, create the publication" > "Next"

k. Select "Finish" to create the Publication. This will take a few moments.

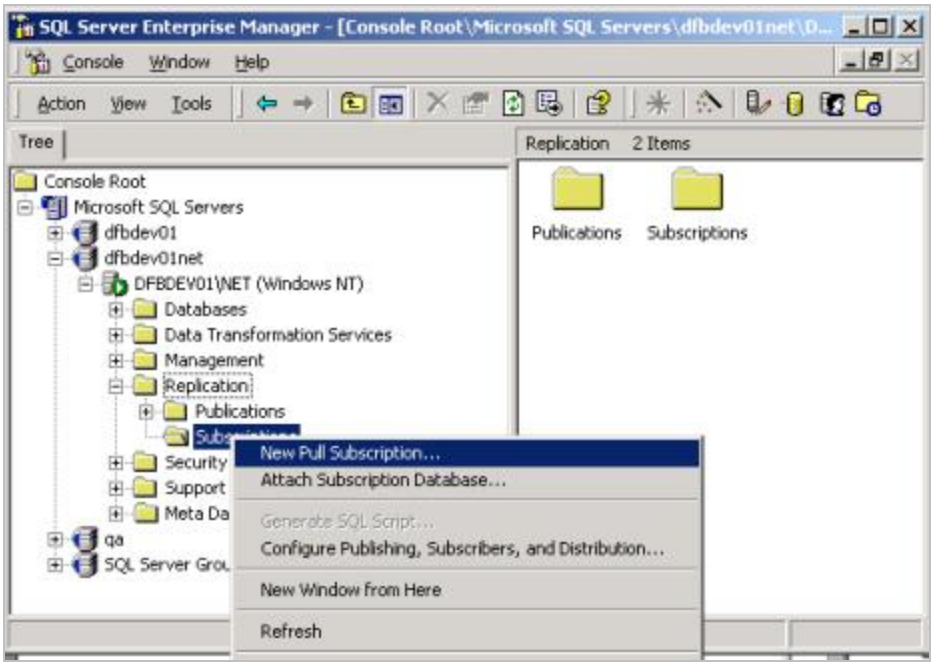
6. Create a Pull Subscription:

- On the Subscriber

a. Select the "Replication" folder

b. Right-click the Subscription folder. Go to **Tools > Replication > Pull Replication to "name of**

server".



- Select "New Pull Subscription" > "Next"
- Select "Look at publications from registered servers" > "Next"
- Expand the Publisher to select the Publication. Click "Next".
- Select destination database (subscriber database) > "Next"
- Select "Yes, initialize the Schema ..." > "Next". This creates a copy of the publication.
- Select "Use snapshot files from the default ..." > "Next"
- Select to replicate:
    a. By the schedule you choose. Subscribers will not have access to the most current data until the update. "Next"

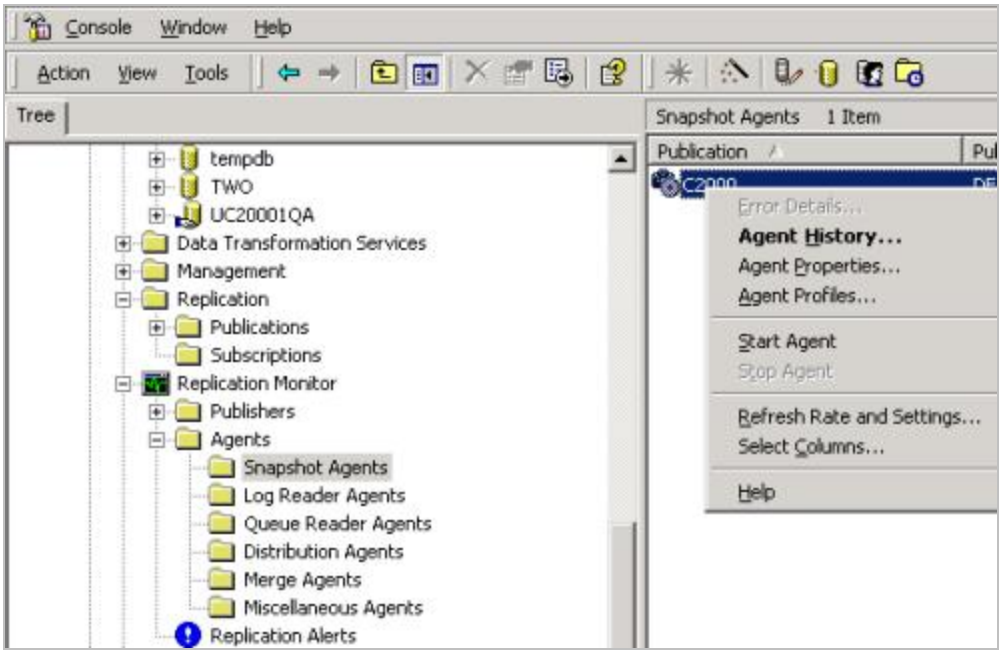
    - OR -

    b. Continuously: This option provides the greatest data integrity but can degrade performance. "Next"
- Start required Services - don't check and > "Next" > "Finish"

7. Start the Service:

- On the Publisher server, select the Replication Monitor folder

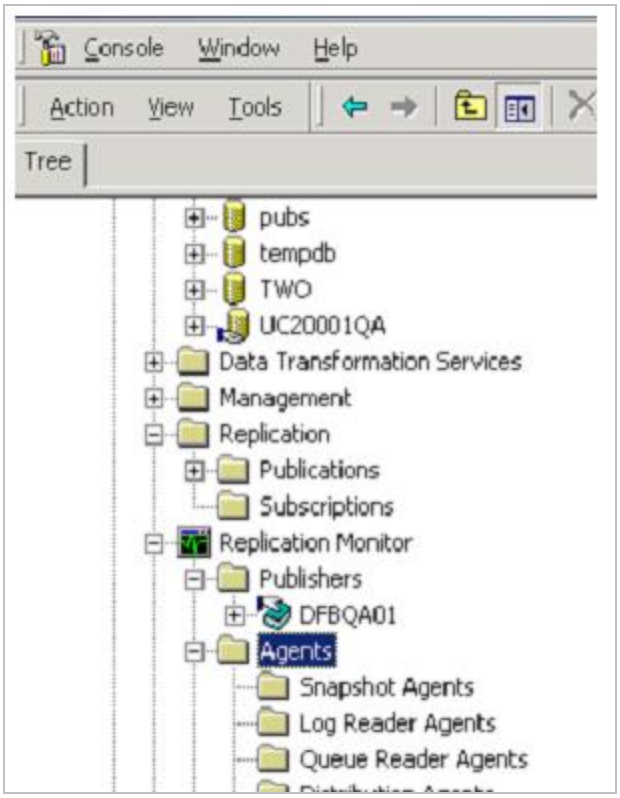
- Select Agents. Right-click the Snapshot Agent.



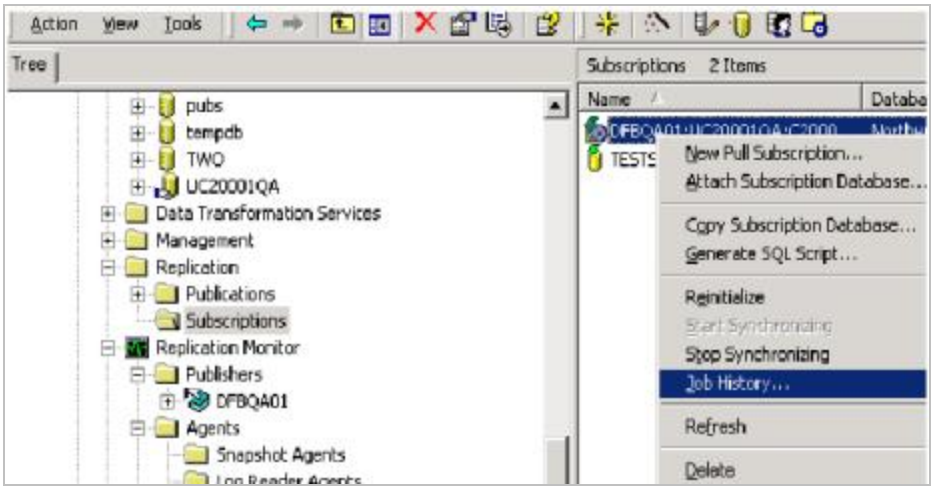
- Right-click the publication "CampusNexus Student" to the right of the Console Root Tree. Select **Start Agent**.
- On the Subscriber server, select the Replication folder.
- Right-click Subscriptions.
- Select **Start Agent**.

Additional Procedures:

1. **Monitor Replication** (view details about your replication)
    - Publications: On the Publisher server, select the Replication Monitor folder. From there, you can select an agent and right-click to see history, status, and properties, and start or stop the agent.



- Subscriptions: On the Subscriber server, select the Replication folder. Click Subscriptions. Right-click the subscription (CampusNexus Student:CampusNexus Student to the right of the console root tree) to see history, status, and properties, and start or stop the agent.



- Do not forget to refresh the server to see the most recent information.

2. Remove Subscription

   On the Subscriber server, select the subscription from the Replication > Subscriptions folder. Right-click the subscription and click Delete.

3. Remove Publications

- On the Publisher server, select the publication from the Replication > Publications folder. Right-click the publication and click Delete.
- Delete all subscriptions before deleting a publication.

File Menu

This menu includes the following options:

- Adding a new lead using the short form or long form
- Closing the active window
- Refreshing the active form
- Deleting a record
- Printing a screen image
- Setting up printer options
- Logging off
- Closing all forms
- Exiting

Part of the menu is assigned to a list of up to nine of the most recent students accessed by the user.

Add New Lead (Ctrl+L)

The Quick Lead (New Lead) short form has the basic information required to record contact information for a new lead. More than one new lead form can be open at the same time. The Quick Lead form is used by staff members such as receptionists, telephone operators, and admissions clerks to rapidly record, while on the telephone with an interested party, the information necessary for a follow-up contact by an Admissions Rep.

The Quick Lead form results in a student master record being created. The data recorded should be for the prospective student, not information about the person making an inquiry on behalf of a student.

If your institution has a Portal site, an Inquiry page is formatted to look like the Quick Lead form. Inquiries submitted from the web do not immediately result in a new student master record. The web inquiries are placed in a screening file. An Admissions department staff member screens the inquiries and decides whether to convert each inquiry to a student master record.

The default Quick Lead form behaves similar to the new batch quick lead entry form. Depending on the Yes/No setting for the Master on Quick LeadAdmissions Setup option, the Quick Lead form behaves as follows:

- If Yes is selected, the Quick Lead form closes and the Student Master form opens.
- If No is selected, when you save a new lead using the Quick Lead form, the form remains open for the next lead to be entered.

CampusNexus Student increments the Quick Leads Entered count and you can use the **Review On** button to see previously entered leads.

See also Lead Categories, Lead Sources and Lead Type.

To add a new lead:

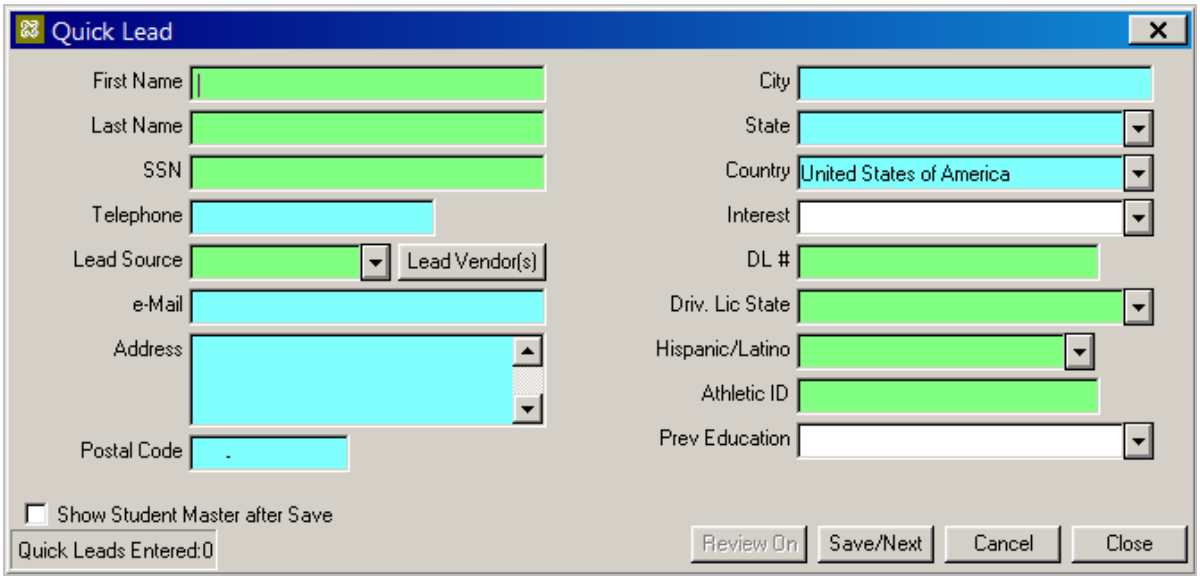
1. Select **Add New Lead** on the File menu, click the **Quick Lead Entry** button on the Toolbar, or press the **Ctrl+L** key combination. A blank Quick Lead form is displayed.

   Note: The format of your quick lead form may be different from the one shown here. A setup option is available to your system administrator to change the format of this form. Other data items may be shown and may be designated as required. Required fields have a different background color.

2. Enter the lead data. Select appropriate options from the list boxes. The form cannot be saved until all required entries have been completed.

3. To add more information about the new lead, click the **Show Student Master After Save** box to check mark it. When you save the new lead, the program will immediately open the Student Master form with the new lead data on it.

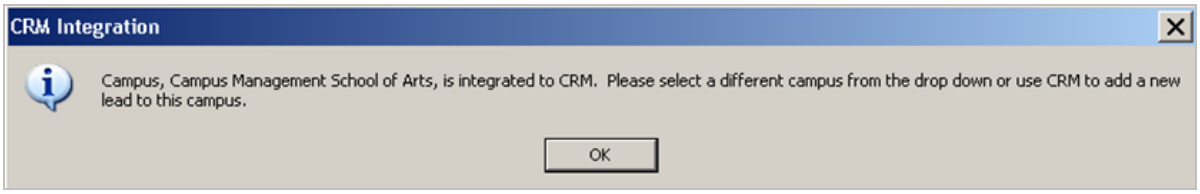
   - If you have set the Master on Quick Lead to **Yes**, the Quick Lead form is closed and the Student Master form is displayed.
   - If **Show Student Master After Save** is not selected when you save a new lead, the Quick Lead form remains open for the next lead to be entered. The system increments the **Quick Leads Entered** count. Use the **Review On** button to see a list of previously entered leads.



4. Click **Save/Next**.

   If there is an Admissions Rep change, enter the effective date of this change. The effective date defaults to the system date. The effective date entered cannot be before the lead date. If the effective date entered is earlier than the lead date, the program will display a message box stating that the effective date must be on or after the lead date.

   When **Adding a New Lead** for the default campus, if both the (system level) **CRM Integration** and (campus level) **Enable CRM Integration** check boxes are enabled, but the (campus level) **Enable new lead entry from CampusNexus Student when CRM is integrated** check box is disabled, the following message is displayed:



5. The following table indicates whether you can create New Lead/Student records within the CampusNexus Student interface based on the various settings:

   CRM Integration Matrix

CRM Integration (System level CRM integration)	Enable CRM Integration (Campus level CRM integration)	Enable new lead entry from CampusNexus Student when CRM is integrated	Allow create Lead/Student for a campus?
OFF	OFF	OFF	YES
ON	OFF	OFF	YES
ON	ON	OFF	NO
ON	ON	ON	YES

New Lead (Full) (Ctrl+N)

The **New Lead (Full) (Ctrl+N)** function on the **File** menu opens a new Student Master form. The **Status Bar** at the bottom of the work area shows "ADD" in the mode text box. The new form has no connection to any previous form which may remain in the background of your work area. In this case, you are starting a new lead/student record in the CampusNexus Student database.

As one of the localization features, the selection you make in the **Country** field affects the format of the **telephone numbers** and **SSN** (if it appears on the form). If you do not select a country, the country defaults to the country in the user's default (login) campus address. See Countries and Address for more information.

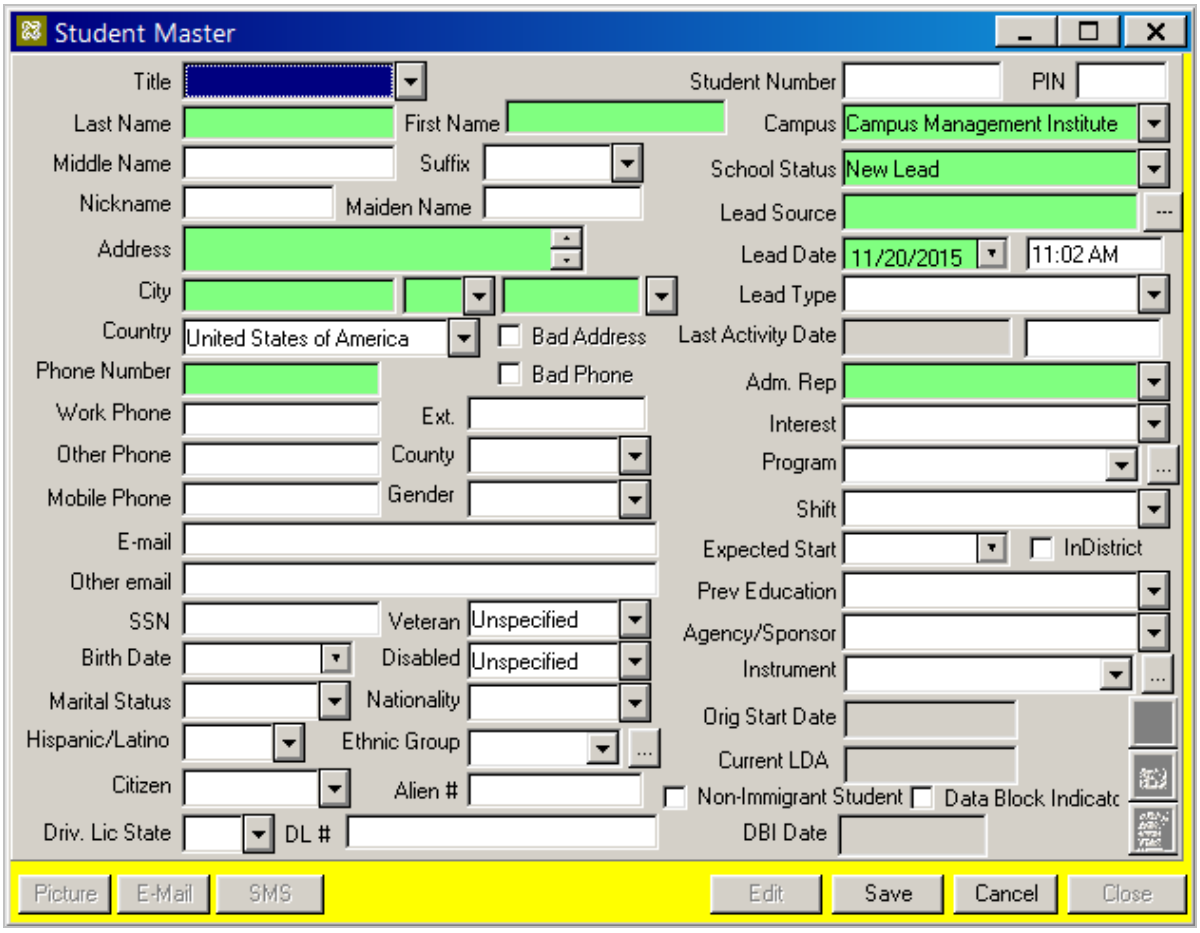
To enter a new Student Master record:

1. Navigate to **File > New Lead (full)**.

   Or click **New Lead (full)** on the Toolbar.

   Or press the **Ctrl+N** .

   A new Student Master form is displayed. Some fields are already completed.

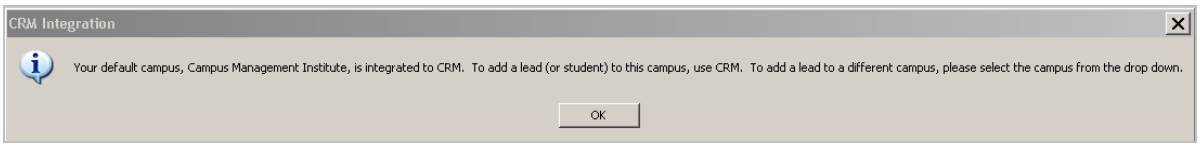


2. Complete the form by entering or selecting data in as many of the fields as you can. Some fields are required. You cannot save the record without completing these fields. The background of required fields is a different color than the optional fields.

3. Click **Save**, or press **Alt+S** to save your changes and change to Display mode.

4. To close a new form without saving any changes, click **Cancel**, or press **Alt+N**. A confirmation message is displayed.
5. Click **Yes** or **No** as required. If you change your mind about closing the form, click **Cancel** in the message window.

   Note: When creating a **New Lead (full)** for the default campus, if both the (system level) **CRM Integration** and (campus level) **Enable CRM Integration** check boxes are enabled, but the (campus level) **Enable new lead entry from CampusNexus Student when CRM is integrated** check box is disabled, the following message is displayed:



   Note: Click on this link to display various CampusNexus Student CRM Integration settings.

Original Rep ID

The **Original Rep ID** field in the Student Master record is updated when adding a new lead to CampusNexus Student. Is is also updated as the current rep ID in the Student Master when editing the **Admissions Rep** for an existing lead.

The following business rules are applied when the **Save** button is clicked, and the value of the **Admissions Rep** was changed:

- If there is a previous **Admissions Rep**, CampusNexus Student displays a form that prompts you to specify the effective date of the **Admissions Rep** change.
- If there is no previous **Admissions Rep**, the Admissions Rep change form is *not* displayed.

If the Admissions Rep Change form is displayed, enter the effective date of the **Admissions Rep** change. The effective date defaults to the system date. The effective date entered *cannot* be before the lead date. If the effective date entered is earlier than the lead date, CampusNexus Student displays a message stating that the effective date must be on or after the lead date.

Close (Ctrl+F4)

Your work area can get cluttered with forms with which you are no longer working. To close the forms, click on a form to be closed, thus making it the active form. Click **Close** on the form, select **Close** on the File menu, or press **Ctrl+F4**.

If the form is in **Edit** mode at the time you close it, you are prompted to save any changes.

Note: Choose **Cascade** from the **Window** menu to organize all the open windows in your work area before using the Close function. This will let you see at least the Title Bar for each open window, thus making it easier to identify the forms you want to close.

Refresh (F5)

Use the **Refresh** function to assure yourself that you are looking at the most current data on a given form. Click the form to make it the active form on your desktop. Then select **Refresh** from the File menu or press the **F5** key. The form will be reloaded with the current data.

This function comes into play when you think that someone else may have updated the data on the form while it is displayed in your work area. If you leave a form in your work area for an extended period of time, refresh it when you come back to it.

Delete

The **Delete** function must be used carefully in CampusNexus Student. The system will not let you delete data that is essential to system operation. In many cases, list data that has been used in student records cannot be deleted. However, some data may be significant to your institution due to its relationship to other items of data, student records, etc. The system will not prevent you from deleting such data. Always consider these relationships before you delete data. Refer also to Delete Lead-Student.

Often it is better to **deactivate** a list option or other item of data rather than delete it. Thus, you save it for historical purposes and prevent it from being used in the future.

If you must delete a form (record) or an item of data, be sure the focus is on the correct form or list item. (The correct form is active.) Select the **Delete** option from the File menu. The record or list item will be ***permanently removed*** from the system.

Note: The **Delete** key on your keyboard is not the same as the **Delete** option on the **File** menu. The **Delete** option is programmed based on the context of the active form window. The Delete key has no effect on an active form other than deleting characters in a data entry field while editing the field. Also, remember that you cannot leave a required field completely blank.

Print

To print an image of the CampusNexus Student main window:

Click the **Print** button on the Toolbar.

- OR -

Select the **Print** option on the File menu.

- OR -

Press the **Ctrl+P** key combination.

To print reports from List forms:

Select the **Print** option at the bottom of the selected form.

To print reports from the Reports menu:

1. Select the desired report, choose the parameters you want to see, and select Preview.
2. After previewing the report on your screen, select **Print**.

Print Setup

Each workstation can be configured for a Reports Printer, a Label Printer, and a Receipt Printer. You can also indicate which font is to be used for label printing. The list of printers from which you can select is determined under the Printers option on your Windows Control Panel. Any printers to be used in CampusNexus Student must be first set up in Windows.

Note: If a workstation only has access to one printer, CampusNexus Student sets it as the default for reports, receipts and labels, automatically. If a workstation has access to multiple printers, CampusNexus Student sets the default printer to be the same as the default printer set up in Windows unless the user specifies that another printer shall be used.

Report Printing Orientation

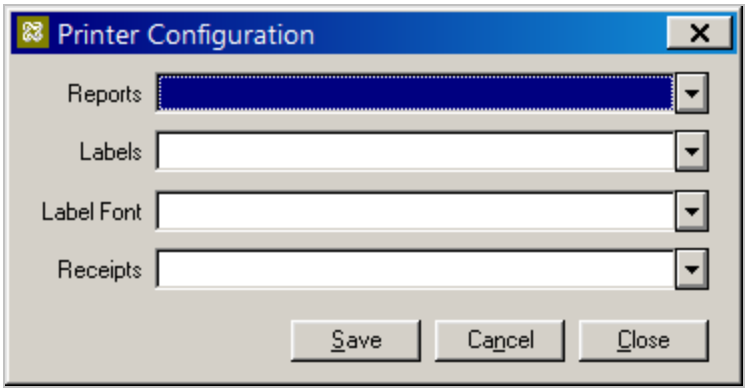
At this time we do not recommend changing the print setup from landscape to portrait orientation because all report information may not be visible on the page due to variable printable margin settings on various types of printers. Also, the Currency Designator setting affects the layout of reports.

Shared Local Printers

Does your network use shared local printers? If so, those printers are not available to others unless the computer to which the printer(s) is attached is on and booted up.

To set up printers:

1. Navigate to **File** > **Print Setup**. The Printer Configuration form is displayed.



2. Select your **Reports** printer from the drop-down list. All reports requested from your workstation, except labels and receipts, are routed to this printer. This includes screen captures triggered by the **Print** option on the File Menu or by clicking on the Toolbar. Checks from the Student Accounts module are also routed to the reports printer. You can change your report printer selection before and after printing checks if you want to keep a special printer loaded with checks.
3. Select your **Labels** printer from the drop-down list. Since mailing labels are routed to this printer, keep a supply of label forms loaded in this printer.
4. Select a **Label Font**. This font is used to print the address on your labels. Test the available options to find the font best suited to the label size you are using. The label font size is fixed at 10 points.
5. Select a **Receipts** printer. Transaction receipts from Admissions Deposits and Student Accounts payments are printed on this printer. You may have preprinted receipt forms loaded in this printer.
6. Click **Save** to save your printer selections. A confirmation message is displayed.

7. Click **OK** on the confirmation message.
8. Click **Close** to close the form.

Recent Students

The File menu displays up to nine most recent students accessed by the current user. Note that you may see more than nine students listed when you click the arrow in the Recent Students list box on the Toolbar above the work area. The first nine are the same as those shown on the File menu.

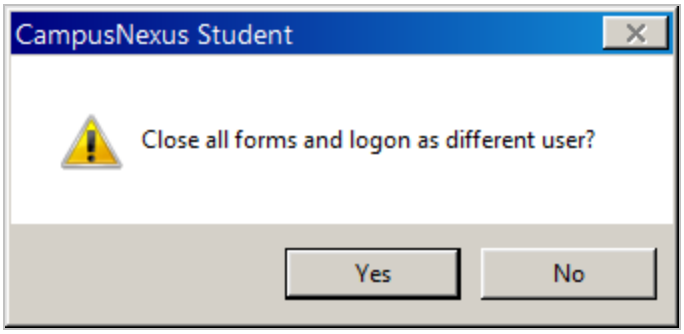
Click the student for which the current form is desired. Alternatively, you can type the number beside the student's name to display the student's form. For example, if the Education form currently has focus in your work area, and you want to see the same form for one of the students listed on the File menu, click the student's name or type the corresponding number. An additional copy of the form is opened with data for the selected student. The form for the previous student remains open in the background.

Recent Employers

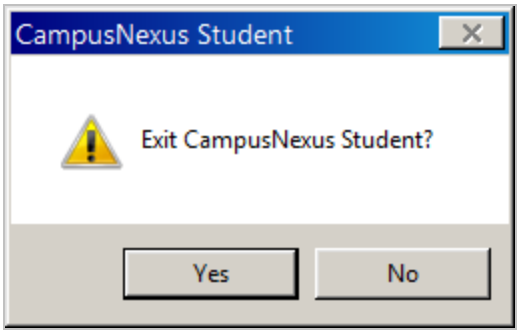
The File menu displays up to nine most recent employers accessed by the current user. Note that you may see more than nine employers listed when you click the arrow in the Recent Employers list box on the Toolbar above the work area. The first nine are the same as those shown on the File menu. Click the employer for which the current form is desired.

Logoff

Use File > Logoff to close all open windows in CampusNexus Student and restart the application. A dialog box is displayed. From there, you can log on again with any valid user ID and password.



As with File > Exit, the application asks for a confirmation that you want to exit from CampusNexus Student. Click **Yes** to continue the logoff procedure. If any forms are open in edit mode, the application asks if you want to save them before exiting.



Close All Forms

Navigate to **File** > **Close All Forms**.

- OR -

Click from the Toolbar.

Use this option to close all student-related forms in your work area. The Report Selection form and the Report Preview form are closed. This option does not close the Search form. It also does not close "modal" forms, in other words, those forms that, once opened, must be closed before you can click on anything outside of the form window.

Exit

You can close (exit from) CampusNexus Student in several ways.

- Click on the main window title bar.
- Double-click on the main window title bar.
- Navigate to the **File** menu and select **Exit** or type the letter **X**.
- If the main window is the active window, type **Alt, F, X**.

When prompted, click **Yes** or type the letter **Y** to confirm. Click **No** or type the letter **N** to stop the exit process and return to CampusNexus Student.

Except for modal forms which must be closed before anything else can be done, it is not necessary to close the forms in the work area before closing CampusNexus Student.

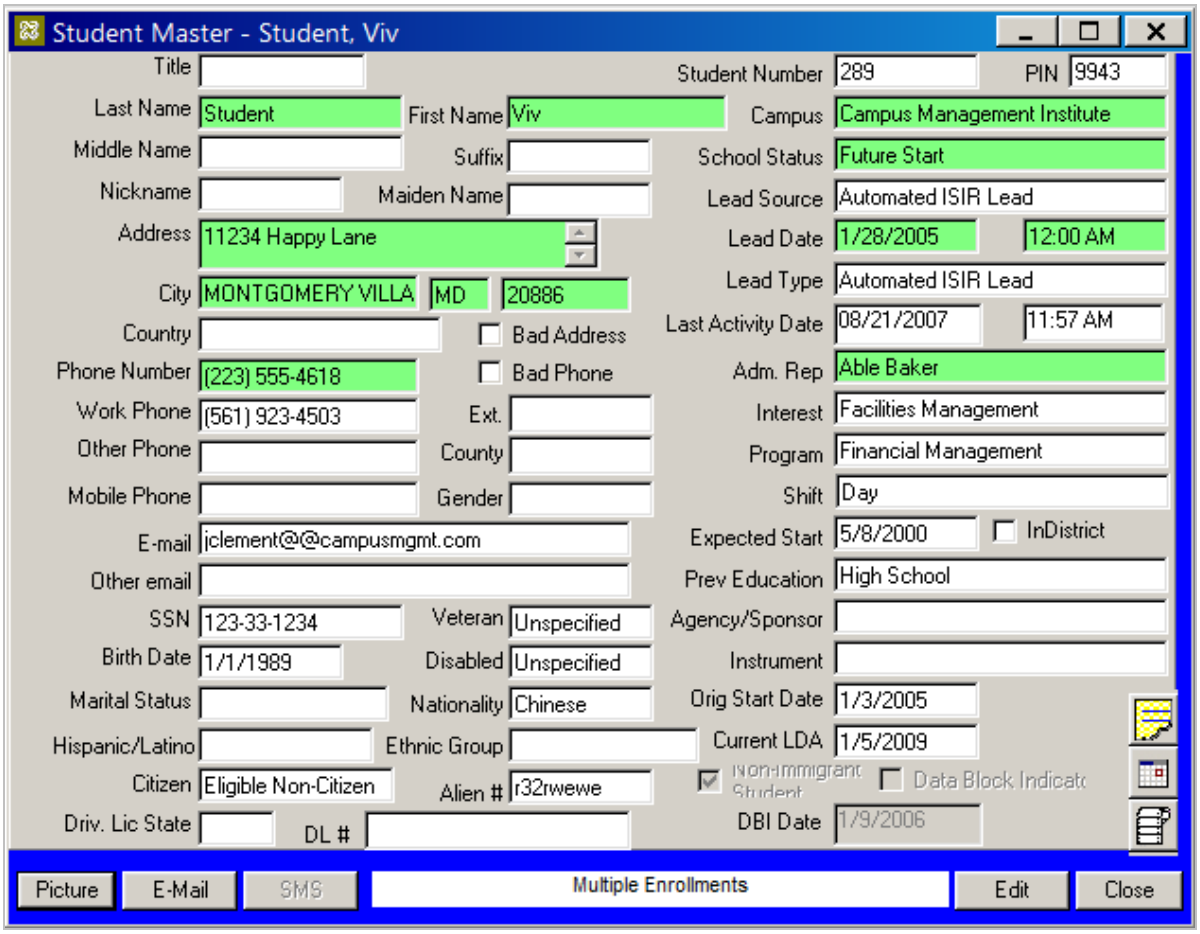
If a form is in **Edit** mode at the time you close it, CampusNexus Student will ask if you want to save changes that may have been made to the data.

Student Master

The Student Master form contains much of a student's basic demographic information. The Student Master form is usually (but not necessarily) populated in the Admissions module by adding a new lead to the database. New leads are entered using the Quick Lead Entry form or the Add New Lead **Ctrl+L** option on the File menu. The **Ctrl+N** key combination can also be used to start a new Student Master record (form) without entering a quick lead.

To view a Student Master form:

1. Select one of the following options:
    - Click **Student** on the Student Bar.
    - Double-click **Recent Students** on the Toolbar. When you change the student in the Recent Students list, a new Student Master form is displayed. If you already have a Student Master form open, it remains open in the background.
    - From the **View** menu navigate as follows:
        - Contact Manager > Student
        - Admissions > Student
        - Financial Aid > Student
        - Student Accounts > Student
        - Academic Records > Student
        - Career Services > Student
        - Loan Management > Student
        - Student Services > Student
        - Housing > Student
    - Use the **Find** menu or click on the Toolbar to search for a student.



Note: The border color around the Student Master form indicates the student's status category. In the setup options under Setup > Status Codes > Colors Tab, your system administrator can choose colors for the status categories.

2. Multiple Student Master forms can be displayed at the same time. The forms always open in the same place in the work area. Unless you have closed, moved, or minimized a previous Student Master form, the next form you open covers the previous form.

   To move between open Student Master forms use the **Window** menu and select **Tile** or **Cascade** to organize all open forms in the work area.

   When you are working with multiple students, ensure that the correct form is current (active). The name of the current student is always shown in the Recent Students text box. The title bar of the active form is always a different color than other forms which may be open in your work area.

3. To edit the information on the form, click **Edit**. See Edit a Student Master.

   Required fields on the form have a background color other than white. If a required field is blank, you must enter data in it when you edit the form, even if you did not intend to provide the information when you clicked Edit.

   Some fields are required by CampusNexus Student (Last Name, First Name, Lead Date, Admissions Rep). Additionally, your institution may designate other fields as required. The system administrator can mark fields as required in either of two ways.

- Open any Student Master (or Quick Lead) form and go to Setup > Required Fields.
- Designate the field as required in the Data Dictionary.

4. To add an activity from the Student Master form, click the **Add Activity** icon at the bottom right of the form. The Activity form is displayed.
5. Click **Close** (Ctrl+F4) to close the active Student Master form. If you are in edit mode when you click Close, you are prompted to save any changes.

Duplicate Student Records

CampusNexus Student checks for duplicate Student Master records when new leads or students are added. The following table columns are used to check for duplicates:

- Student ID
- Social Security Number
- Phone Number
- Date of Birth and Student Name (combined)
- Driver's License Number
- E-mail address.

Each check is performed only if you entered data in the corresponding field. If at least one match is found, a grid showing the matches is displayed

If the lead is a duplicate and can be found on the grid, click the record and the lead form is populated with the information for that lead. The information can then be edited. The campus for the lead can be changed only if the campus ID for the record from the grid is in the list of campuses to which you have access.

Student ID Setup

The Student ID field in the upper right corner of the Student Master form is the means of identifying students. The Student ID should not be confused with the Social Security Number (entered elsewhere on the Student Master form), or the Enrollment ID which is assigned automatically to each student's enrollment in a program version. Furthermore, the Student ID field is not required by CampusNexus Student to keep track of student master records or any other student-related data. That function is handled internally by unique record identifiers in database tables.

The following setup features give your institution the student identification options it requires.

- Setup > Admissions – Select one of the following values for the Student ID Option field:
    - Sequential Number
    - Use Student ID Format
    - Do Not Generate
- Setup > Required Fields – Select whether the Student ID field is required or optional.
- Setup > Field Level Security – Select one of the following values for each staff group:
    - Update
    - Display
    - None (no access)

Student ID Alternatives

If desired by your institution's administration, CampusNexus Student **automatically generates** a student identification number or a formatted code (you determine the format) and assigns it to each new lead entered into the system. This identification is unique and permanently attached to the lead/student record.

As a second alternative, you can elect to **require manual entry** of a student ID of your own choosing (established outside of CampusNexus Student) each time a new lead/student is entered. CampusNexus Student does not allow you to enter a duplicate Student ID. You can set up security measures as to which staff group can enter or change this identifier. You can also set the Student ID field as required so that a Student Master record cannot be saved without it.

As a third alternative, you can elect to **optionally enter** or not enter a student ID as the person creating a new lead/student master desires. If your institution intends to use the Web interface features of CampusNexus Student for student access, this is not a viable option. The Web interface requires a student ID number for student access.

A fourth alternative is to **not use** the student identification field at all. Perhaps your institution identifies all students by their Social Security Number or Name and does not assign another unique identifier. If your institution intends to use the Web interface features of CampusNexus Student for student access, this is not a viable option. The Web interface requires a student ID number for student access.

Alternative 1 - Automatic Student ID Generation

1. Navigate to **Setup > Admissions**.
2. In the **Student ID Option** field, select **Sequential Number** or **Use Student ID Format**.
3. In the **Student ID** field, and enter or accept the next sequential identification number to be assigned. This number is used with "Sequential Number" and "Use Student ID Format".
4. Open a **Student Master** form (a new one or an existing student).
5. Navigate to **Setup > Required Fields**.
6. Be sure the Student ID field in the upper right corner of the form is **not** selected. (It is not necessary to mark it as

required if CampusNexus Student is going to supply the number.)

7. **Close** the Required Fields form. CampusNexus Student closes the Student Master form.
8. Open a **Student Master** form again.
9. Navigate to **Setup > Field Level Security**. The Field Security form for the Student Master is displayed.
10. For all Staff Groups, select the **Display** option for the Student ID field.
11. **Close** the Field Security form.

CampusNexus Student now automatically assigns a unique number or code to each new lead/student record and does not allow it to be changed after it is entered.

Alternative 2 - Required Manual Entry of the Student ID

1. Navigate to **Setup > Admissions**.
2. In the **Student ID Option** field, .select **Do Not Generate**. The "Student ID Format" and the "Student ID" (next number) settings are irrelevant in this alternative.
3. Open a **Student Master** form (a new one or an existing student).
4. Navigate to **Setup > Required Fields**.
5. Be sure the Student ID field in the upper right corner of the form is selected.
6. **Close** the Required Fields form. CampusNexus Student closes the Student Master form.
7. Open a **Student Master** form again.
8. Navigate to **Setup > Field Level Security**. The Field Security form for the Student Master is displayed.
9. For all Staff Groups, select the **Update or Display** option for the Student ID field as required.
10. **Close** the Field Security form.

CampusNexus Student now requires a unique number or code to be entered for each new lead/student. (Note that the Student ID is not entered on the Quick Lead form unless you add it to the form. See Quick Lead Form Design. It will be a required field on that form also.)

Alternative 3 - Optional Manual Entry of the Student ID

1. Navigate to **Setup > Admissions**.
2. In the **Student ID Option** field, select **Do Not Generate**. The "Student ID Format" and the "Student ID" (next number) settings are irrelevant in this alternative.
3. Open a **Student Master** form (a new one or an existing student).
4. Navigate to **Setup > Required Fields**.
5. Be sure the Student ID field in the upper right corner of the form is **not** selected. (It should not be marked as required if a Student ID is optional.)
6. **Close** the Required Fields form. CampusNexus Student closes the Student Master form.
7. Open a **Student Master** form again.
8. Navigate to **Setup > Field Level Security**. The Field Security form for the Student Master is displayed.

9. For all Staff Groups, select the **Update or Display** option for the Student ID field as required.
10. **Close** the Field Security form.

CampusNexus Student now allows an optional unique number or code to be entered for each lead/student. The Student ID can be changed if necessary but this practice is **not recommended**.

Alternative 4 - No Use of the Student ID Field

1. Navigate to **Setup > Admissions**.
2. In the **Student ID Option** field, select **Do Not Generate**. The "Student ID Format" and the "Student ID" (next number) settings are irrelevant in this alternative.
3. Open a **Student Master** form (a new one or an existing student).
4. Navigate to **Setup > Required Fields**.
5. Be sure the Student ID field in the upper right corner of the form is **not** selected. (It should not be marked as required if a Student ID is not used.)
6. **Close** the Required Fields form. CampusNexus Student closes the Student Master form.
7. Open a **Student Master** form again.
8. Navigate to **Setup > Field Level Security**. The Field Security form for the Student Master is displayed.
9. For all Staff Groups, select the **None** option for the Student ID field.
10. **Close** the Field Security form.

The Student ID field is effectively disabled by implementing Alternative 4.

Student Master Fields

This table lists information and/or data entry instructions for all fields on the **Quick Lead**, **Student Master**, and **Edit Student Information** forms. The fields are listed in the tabbing order of the Student Master form, upper left to lower left followed by upper right to lower right.

Field Descriptions for the Student Master Form

*An asterisk next to the field name indicates a list that can be maintained by your school. See Maintaining Lists for more information.

Field Descriptions

Field	Description
Title*	Enter the lead/student's title such as Mr., Ms. etc.
Last Name, First Name	Enter the lead/student's last name in the first text box on this line followed by the first name in the second box.
Middle Name	Enter the lead/student's middle name (accommodates SEVIS requirements).
Suffix	Enter the lead/student's name suffix (if any) such as Jr., III, and so on (accommodates SEVIS requirements).
Nickname	Enter the lead/student's nickname (if any).
Maiden Name	Enter the student's maiden name (if any).
Address	Enter the lead/student's current home address. You can type multiple lines in this field up to a maximum of 256 characters. Press the Enter key at the end of each address line. Press Tab to leave the field. If you use more than two or three lines, you may not see all of the address on all reports, including labels. Do not include the city, state, and postal code in this field. **Note**: If an address on a student record has more than 40 characters, the additional characters in the address line will not be extracted to be sent to COD, but will be truncated. If a Post Office Box number or Apartment number causes the address line to exceed 40 characters, some elements of the Street Address line must be abbreviated. If the student address on the master form is changed, CampusNexus Student prompts you with an option to save the previous address. (Set up an address type as "Old Address" or "Previous Address" to assign the old address.)
City, State*, Postal Code (ZIP Code)	Enter the City, State Code, and Postal Code. **Tip!** If you enter the postal code (ZIP) first, CampusNexus Student fills in the correct city and state. If you enter the city and state, or just the state, you can select from a list of all ZIP codes that apply by clicking the arrow beside the ZIP field. The ZIP Code database includes **alternative ZIP codes**, cities, and an indicator marking the primary city. When entering a ZIP code into any form in CampusNexus Student, if the ZIP code covers more that one city, a drop-down list of cities is displayed and you can select the correct city from the list. The "primary" city is selected as the default, but you can select any city from the list. If only one city matches the ZIP code, that city will be used without displaying the list of cities.

Field	Description
Country*	Select from the list box the country name to be used with the home address on mailing labels. CampusNexus Student defaults the country field when you add a student using the Student Master form or the Quick Lead form. The Country field defaults to country in the Campus Location Address form. We modified the Campus Location Address form so you can select a country from a list of available countries in the SyCountry table. The selection you make in the **Country** field affects the format of the **telephone numbers** and **SSN.** If you do not select a country, the country defaults to the country in the user's default (login) campus address. See Lists > Admissions > Countries and Setup > Campus Locations > Campuses > Campus Information > Address for more information.
Bad Address	Check this box to indicate that an error has been discovered in the lead/student's address (Incomplete or mail returned, etc.)
Telephone	Enter the lead/student's home telephone number. Depending on how your school has formatted the field, the program may or may not insert the parentheses and hyphen for you. Sixteen (16) characters are allowed in this field.
Bad Phone	Check this box to indicate that an error has been discovered in the lead/student's home phone number.
Work Phone	Enter the lead/student's work telephone number. Depending on how your school has formatted the field, the program may or may not insert the parentheses and hyphen for you. Sixteen (16) characters are allowed in this field. When a student is placed in a job via a student placement, the program updates the Work Phone number in the student's master record with the employer's phone number. The Work Phone Extension is also updated.
Extension	Enter the work phone extension number.
Other Phone	Enter additional phone number.
Mobile Phone	Enter the mobile phone number. For the student to subscribe to receive SMS text messages, the student must have (1) a mobile phone number on file on the Student Master form, and (2) on the Contact Manager's Contact Method screen under SMS Preference, the Subscribe to SMS Service check box must be selected and (3) a SMS service provider must be selected. The Mobile Phone field is audited to identify who last updated CampusNexus Student (View > Admissions > Audit). If the campus administrator updated the mobile phone number, that would mean that the student signed a paper Disclaimer document and it is on file. If a Portal user updated the mobile phone number, that would mean that the student signed an online Disclaimer document and it is stored electronically.

Field	Description
SMS Button	You can view the SMS button on the Student Master form when adding or editing a student. If the student has no mobile number and the student has not subscribed to get SMS, the SMS button is disabled on Student Master form. Clicking the SMS button displays the SMS Message screen where you can create a text message to send. Notice the Maximum Character Limit in the bottom left of the screen. As you enter each keystroke, it is noted in the Character(s) box in the bottom right of the screen. This number will refresh with every key press. A red warning message is displayed as you cross the limit of maximum characters, notifying you that the text is truncated. Click "Send" to send the message to the user. Click "Close" to close the form and return to the Student Master form.
e-Mail (field)	Enter the lead/student's e-mail address.
Other e-Mail	Enter additional e-mail address.
Social Security Number (SSN)	Enter the lead/student's Social Security Number. There is a setup option to allow or not allow duplicate SSNs within the campus or within the entire multi-campus database.
County*	Select the county in which the lead/student lives.
Date of Birth	Enter the lead/student's date of birth. You can type the date (Example: 092880 or 09/28/80) or select the date from the date wizard. Click the arrow beside the field to open the wizard. Regardless of how it is entered, the program displays the date as MM/DD/CCYY.
Gender*	Select the lead/student's gender from the list. (This may seem redundant but there's a reason for using a list. Your school can decide how it wants to handle cases where gender has not yet been indicated.)
Marital Status*	Select the lead/student's marital status.
Ethnic Group*	Select the ethnic group that best describes the lead/student.
Nationality*	Select the lead/student's nationality. This applies to schools that have international students enrolled.
Hispanic/Latino	Select Yes or No. By default, this field is blank. You can delete selected values by using the Delete key. **Note**: This field appears whether the Student Form is configured as "Short" or "Long". In addition, existing field level security logic applies to this field. Additionally, the field caption may be updated in the Data Dictionary by navigating to **Setup** > **Data Dictionary** > **System** (tab) > **Edit** (select IsHispanic).
Ethnic Group	You can select one or more Ethnic Groups. **Note**: This field appears whether the Student Form is configured as "Short" or "Long". In addition, existing field level security logic applies to this field.
Citizen*	Select the lead/student's citizenship status.

Field	Description
Alien Number	Enter the lead/student's Alien ID number (if applicable).
Driver License State*	Select or type the state code of the lead/student's driver license.
Driver License Number	Enter the lead/student's driver license number.
Veteran	Select the appropriate option for the student. The options are Unspecified (from conversion), Yes, or No.
Disabled	Select the appropriate option for the student. The options are Unspecified (default), Yes, or No.
Student ID	This field is filled in by CampusNexus Student based on your school's setup parameters. You may or may not be able to change this number based on your school's setup parameters. Some schools may elect to enter a number here that has been assigned outside of CampusNexus Student. The number must be unique in CampusNexus Student. No duplicate IDs are allowed.
PIN	The Personal Identification Number (PIN) must be numeric and must consist of four numbers. It can remain blank. You can enter or change the PIN as required. The CampusNexus Student Web interface requires the student to enter his or her Student ID and PIN during the login process. When editing or adding a Student Master form, if the PIN is blank and you change the SSN, the program defaults the PIN to the last four characters of the SSN. If the last four characters begin with a zero, for instance 0398, the PIN defaults to a 1 followed by the last three characters of the SSN. The student's PIN is 1398.
Campus*	Select the lead/student's campus. The list of campuses from which to select includes only the campuses you are authorized to work with. As a result of the Program Transfer feature it is not necessary for Campus to be editable on the Student Master form if the student's status category is Enrollment. The campus is changed in the Transfer option on the Enrollment. We changed the logic on the Student Master so that the Campus can be edited only if the student's status category is Lead.
School Status*	Select the lead/student's status in school. CampusNexus Student controls which status codes can be selected at any given time in the student's cycle. The status options come from the Status Codes option on the Setup menu. In conjunction with the new Automatic Document Scheduler feature, document schedules based on "Pre-Enrollment" or "Enrollment" are evaluated when the status for a student is modified and saved on the student master form (frmAmStudMaster). If the student's data matches the specified criteria for a document schedule where the criteria includes student status, all documents attached to the document schedule that are not already scheduled are scheduled for the student.
Lead Source*	Select the Lead Source for this lead/student. Lead sources indicate how the student heard about your school. Click the button to the right of the text box to select one or more lead sources. You can select multiple lead sources for a student. Click to select multiple lead sources. After selecting, click the button again to close the list.

Field	Description
Lead Date	CampusNexus Student enters the current date and time when a new lead/student record is created. If you edit this date, you can type the date (Example: 092801, 09/28/01) or select the date from the date wizard. Click the arrow beside the field to open the wizard. Regardless of how it is entered, the program displays the date as MM/DD/CCYY.
Lead Type*	Select the lead type for this lead/student. Lead types can be anything that your school says they are. For instance, Newspaper, High School, TV, Radio, or Handout could all be lead types.
Last Activity Date	Read-only. Displays the last time information was changed for this student.
Admissions Rep*	Select the Admissions Rep for the lead/student. Only staff members who are classified as admissions representatives (Admissions Rep Group) is shown on this list. Occasionally, a staff member is removed from the Admissions Rep group after having been assigned to students as their original rep. When this happens, the program retains the name of the former rep on the student records.
Interest*	Select the Program Group in which the lead/student is interested. Program groups are groups of related programs such as business, medical, dental, social sciences, etc.
Program*	Select the program(s) of study in which the lead/student is or wishes to be enrolled. If the program is selected for a new lead, the program-related documents will be listed for tracking in the lead/student's document file. Enrollment in the program is not a requirement. Similarly, any program-related entrance tests are attached to the lead/student's file. Click ... to select more than one program. After selecting, click the button again to close the list.
Shift*	Select the shift (days, evenings, etc.) in which the lead/student attends classes.
Expected Start (Date)	Enter the lead/student's expected start date. You can type the date (Example: 091399, 09/13/99) or select the date from the date wizard. Click the arrow beside the field to open the wizard. Regardless of how it is entered, the program displays the date as MM/DD/CCYY.
Previous Education*	Select the lead/student's previous education level (high school, GED, college, etc.) code. **Important**: This text box must be populated with the proper Ability to Benefit code for the student to pass validation at COD. If you have not set up ATB associations yet, go to If this text box contains ATB codes of 3 or 5, or text box is blank, the student will fail validation and an exception will be generated at COD. To set up ATB associations, go to **Tools > Financial Aid > Education Level Setup**.
Agency/Sponsor*	Select an agency or sponsor with which the lead/student is associated. **Note**: The Agency selection on the student's master form designates one of possibly many agencies. It is not a branch. It is a signal that the student has some relationship with the agency. It is for your information and report selection purposes. The Agency shown on the student master may have several branches. To complete the connection between the student and the agency, select and add an agency branch under View > Contact Manager > Agency Affiliations. You can also add additional agency/student relationships from the Agency Affiliations form.

Field	Description
Instrument (Extra-Curricular)*	Select a code that describes the lead/student. The label of this field is often changed to something that is meaningful to your institution. At installation, CampusNexus Student labels this field as "Extra-Curricular", but your school may call it something else. It is possible to select more than one choice for this field. Click ... to select more than one program. After selecting, click the button again to close the list.
Original Start Date	Read-only. When a student has multiple records,many schools report strictly on the student's original start date, rather than the student's current start date. This date is also retained when the student's start date changes for any reason.
Current LDA	Read-only. In CampusNexus Student, a student's last date of attendance (LDA) is stored on the enrollment record. Therefore, a student with three enrollments has three LDAs. Schools need the ability to see the most current LDA without having to search though the enrollments. This field is updated each time attendance is posted.
Non-Immigrant Student	Select or clear this box as required. This field is required for Student and Exchange Visitor Information System (SEVIS) processing for the Immigration and Naturalization Service (INS). This check box appears on the Student Master form only if your school accepts international (nonimmigrant) students, exchange visitors, or both.
Data Block Indicator	Select Data Block Indicator if some student data is to be blocked at the Clearinghouse from distribution to other servicers. This indicator, along with the other data, is sent to the Clearinghouse. See also Clearinghouse Setup. The field is disabled by default. If your campus is using the Clearinghouse for sending IPEDS data to the Department of Education, this check box will appear on the student master form, otherwise it will not appear. See FERPA Document Setting for Family Educational Rights and Privacy Act (FERPA) laws.
Comments or	Click Comments to open a form for entering miscellaneous comments about the lead/student. The button appearance changes if comments exist or not for the record. No comments have been entered. Click to add a comment. Comments have been entered. Click to edit a comment.
Add Activity	Click Add Activity to open a form for entering an activity related to the lead/student. If your school uses the automatic activity features of CampusNexus Student, the act of creating a new lead or changing a student's status may trigger activities to be assigned to staff members.
Print Labels	Click Print Labels to print a mailing label from one or more addresses related to the lead/student. See Print Setup for information about choosing a label printer.
Picture	Click Picture to see, add, or edit a picture of the student. The student picture must be in bitmap (*.BMP) format for use in CampusNexus Student.
E-Mail	Click E-Mail to send an e-mail message to the student. An e-mail address must be present in the student's master record before you can use this feature.

Field	Description
Multiple Enrollments	This read-only field appears only if the student is enrolled in more than one program version at your school.
More on Student Status - Change Cancel to New Lead	When a student cancels an enrollment, i.e., notifies the school that he or she will not be attending classes, the student's status is usually changed to Cancelled. To change a Cancelled status to New Lead, use the Student Master form. You cannot change a Cancel to a New Lead using the Status History form. This can only be done from the Student Master form.

Student Status

What is Student Status?

During the course of a student's relationship with your institution, the student's status, with respect to CampusNexus Student, changes several times. When the first record is created for the prospective student (lead), the default "New Lead" status is assigned to it. from that point forward, staff members and the system initiate a series of status changes. Different departments of the school are responsible for certain status changes.

For example, a new lead might progress in the following series of status changes:

1. New Lead (Admissions)
2. Interview Scheduled (Admissions)
3. Interviewed (Admissions)
4. Application Accepted (Admissions)
5. Future Start (Enrolled, not yet attending, Admissions)
6. Active (attended first class, Academic Records)
7. Leave of Absence (Academic Records)
8. Graduated (Academic Records)
9. Placed (Placement)

Authority is granted to staff members in certain departments to execute the changes in student status. A few status changes happen automatically, such as the change from Future Start to Active. This change is triggered by attendance in a class section (if attendance is being tracked, otherwise, it must be changed manually). Status changes can be reversed or rolled back in some circumstances that are controlled by system setup parameters. These are set by your system administrator.

The description of status changes is controlled by your system administrator in the Setup menu. CampusNexus Student must know that your status codes and descriptions are related to certain very specific conditions which are listed in the setup procedure. For example, your school might have a student status described as "In Trouble". For CampusNexus Student to understand what this means, you would have to relate your status with a CampusNexus Student System Status known as "Probation". Further, CampusNexus Student knows that the System Status code for "Probation" belongs to a Category of similar codes known as "Active". "Active" means that the student is still on the active roster for your school.

Status codes must be classified in the manner described above so that CampusNexus Student knows how to properly report your student population on reports required by the Department of Education, accreditation agencies, and so on.

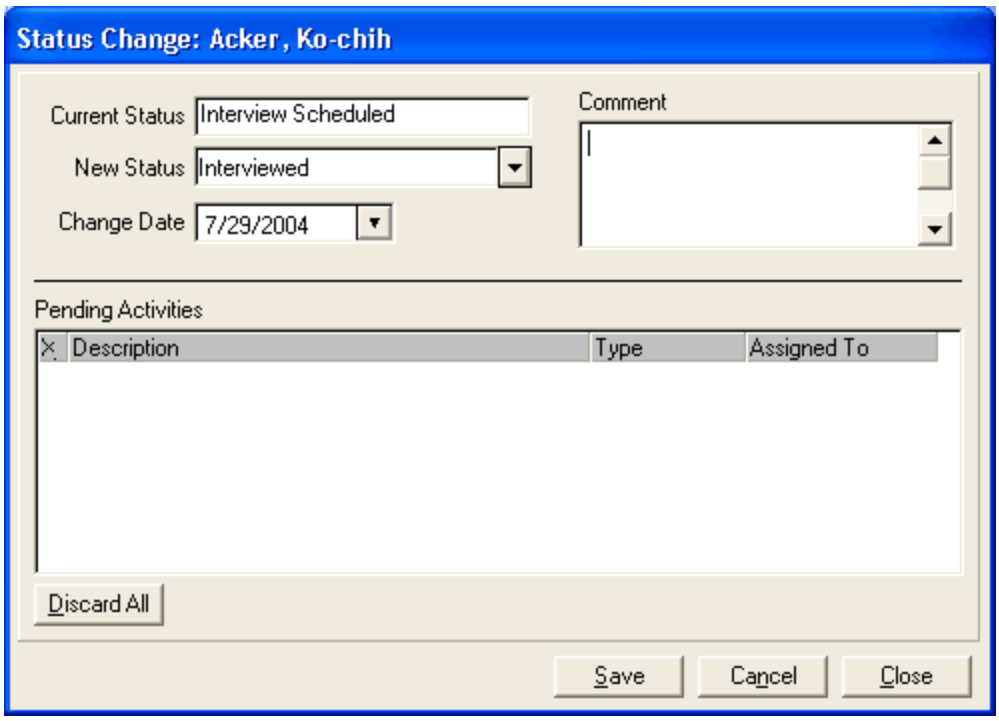
Change a Student Status

To change the status of a student:

1. You must be granted the proper authority by the system administrator.
2. You must be in the proper department for making the required change. This is also controlled by the System administrator.
3. Use the **Find** tool, if necessary, to locate and **select the student** for whom the status change must be made. The **Student Master form** must be displayed.
4. Click **Edit** to edit the Student master form.
5. If the text in the Status text box is "dimmed" you cannot change the student's status at this point.
6. Click the arrow beside the **Status** text box. A list of valid status changes is shown.
7. Select the status to which the student must be changed.
8. Click **Save** to save your status change. When you save the Student master form with a status change made, an

additional form is displayed. On this form, you can enter comments regarding the change and you can discard any activities that no longer apply due to the change of status.

9. Click **OK** on the Status Change form to accept it and finalize the status change.



More on Student Status

Change Cancel to New Lead. When a student cancels an enrollment, i.e., notifies the school that he or she will not be attending classes, the student's status is usually changed to "Cancelled". To change a "Cancelled" status to "New Lead", use the Student Master form. You will not be allowed to change a "Cancel" to a "New Lead" using the Status History form. This can only be done from the Student Master form.

Adding a Quick Lead

The Quick Lead form is intended for rapid data entry of the most basic information about a person making an inquiry concerning your institution. It can be used by receptionists, telephone operators, or other staff members to gather data for later response by someone such as a sales or admissions representative.

The format of the Quick Lead form is flexible. See Quick Lead Form Design for more about designing your institution's forms. If your institution accepts international (nonimmigrant) students, the quick lead form may contain fields that are specifically required for processing data for the Students and Exchange Visitors Information System (SEVIS) of the Immigration and Naturalization Service (INS).

To quickly add a lead:

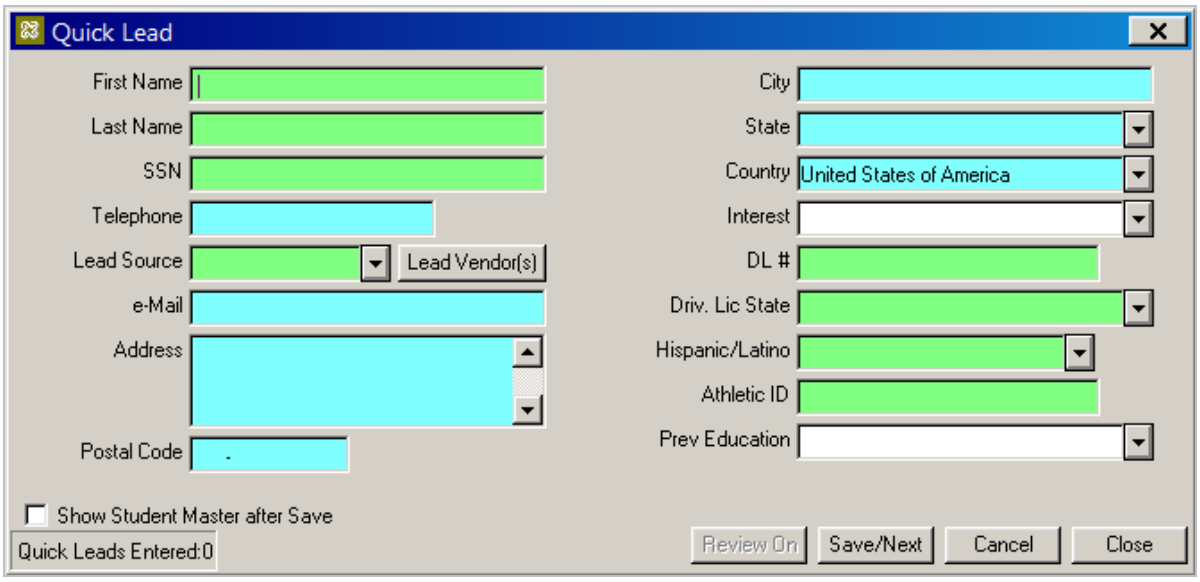
1. Click the **Quick Lead Entry** button on the Shortcut Bar.

   Or, select **File** > **Add New Lead**.

   Or, press the **Ctrl+L** key combination.

   The Quick Lead Entry form is displayed.

2. Enter the necessary data. Fields with colored backgrounds are required.



   Some required fields are linked so that only one entry out of several is required. In the example, the fields with blue backgrounds are linked. If you enter data in any one of the three, the requirement is satisfied. (On your Quick Lead form, the colors may be different.)

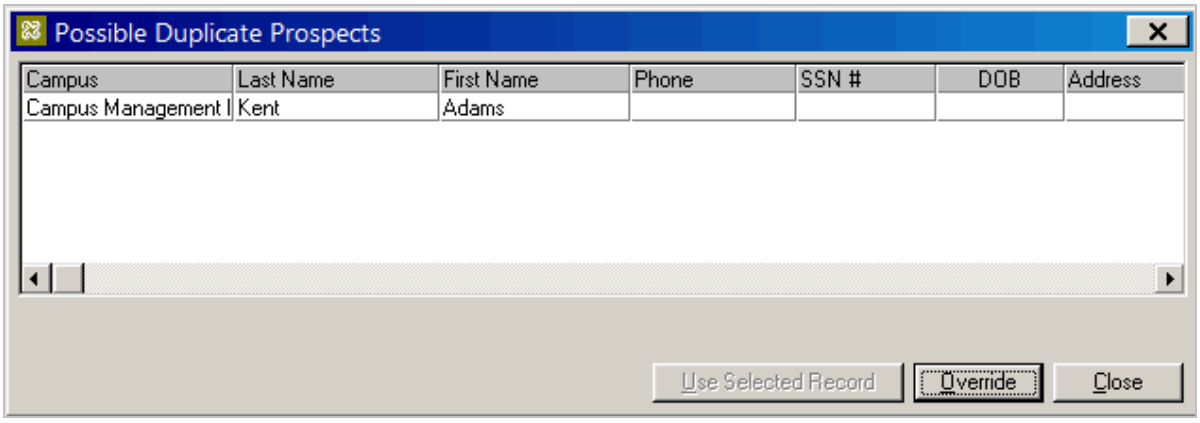
   The drop-down lists on the Quick Lead form are campus-specific. Only the options set up for the campus selected at the top of the form are displayed.

   As you enter data, CampusNexus Student checks the database for duplicates. The following fields are checked for duplicate values:

   - Campus
   - Student Name (combined)
   - Phone

- Student ID or Social Security Number
- DOB
- Address
- E-mail address.

If a duplicate is found, the Possible Duplicate Prospects form is displayed.



If the new lead is a duplicate, select the record in the grid and click **Use Selected Record**. The lead form will be populated with the information for that lead. The information can then be edited.

Otherwise, click **Override** to continue entering the new lead record with data similar to the record already on file.

The campus for the lead can be changed ONLY if the campus ID for the record from the grid is in the list of Campuses that you have access to. If you do not have access to the campus of the lead's record, you cannot change the campus.

3. The Quick Lead form is an abbreviated version of the Student Master form. To enter additional information about the new lead in the Student Master, select **Show Student Master after save**.
4. Click **Save** to save your new lead.
5. Clear the "Show Student Master after save" check box to continue entering new leads. When you clear the check box, the Save button label changes to **Save/Next**. See Batch Quick Lead Entry for more about adding batches of leads.

   The **Quick Leads Entered** value in the lower left corner of the form is incremented as long as you do not close the form.

Adding a New Student

The distinction between adding a new lead and adding a new student is in the form that is presented when you press the **Ctrl+N** key combination. The **New** (**Ctrl+N**) option on the **File** menu will open a blank **Edit Student Information** form. You can then enter complete data for the new lead or student.

Note: The field labels on your Edit Student Information form may vary from those of the example. Your system administrator can change the labels in the data dictionary. You may even see the labels in a different language such as Spanish or French.

Additionally, your school may use "format masks" that are different from the illustration. For example, fields such as the telephone number may be formatted for international data.

Duplicate Student Records

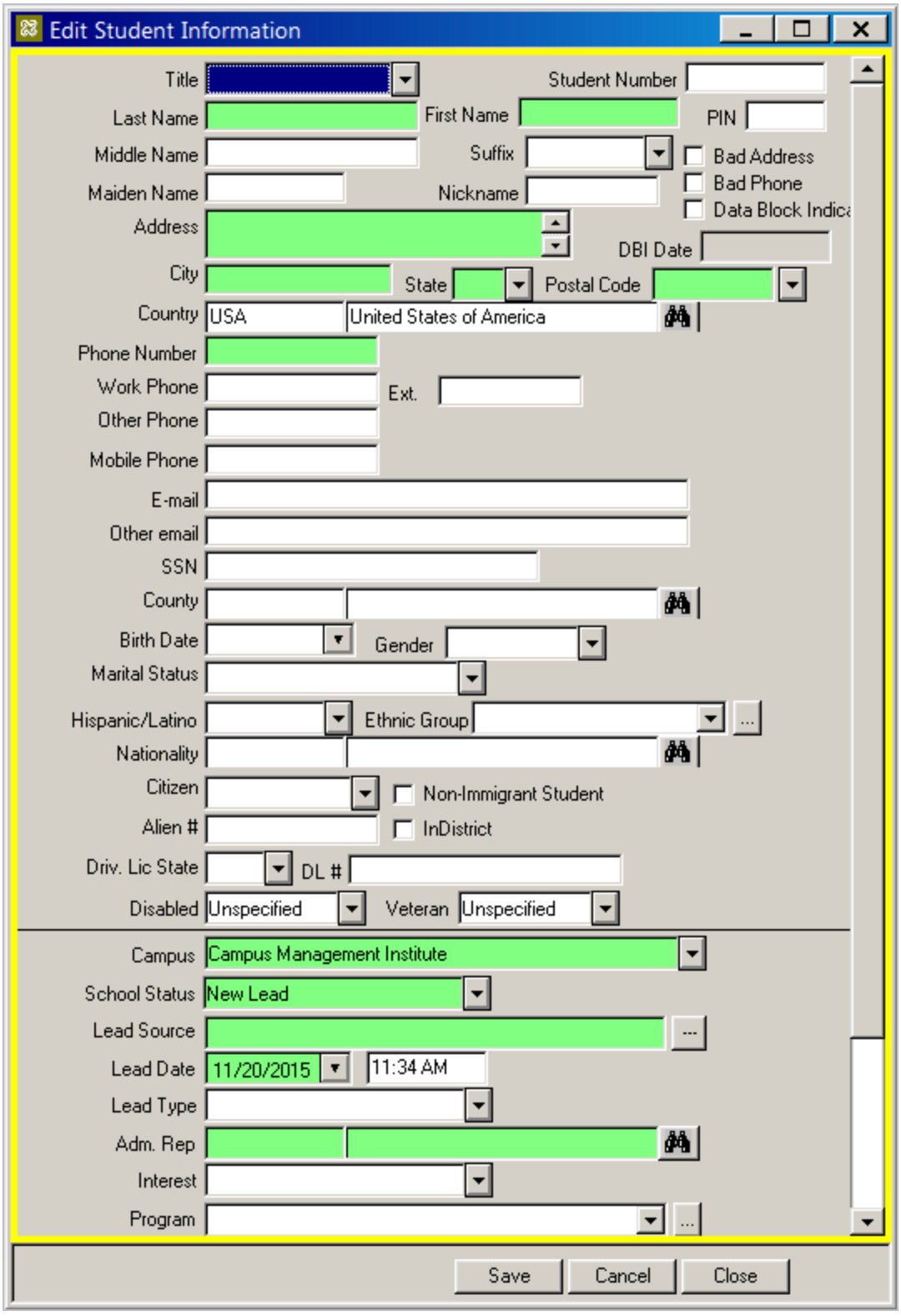
CampusNexus Student checks for duplicate student master records when new students are added. The columns that are used to check for duplicates are Student ID, Social Security Number, Phone Number, Date of Birth and Student Name (combined), Driver's License Number, and E-mail address. Each of these checks is performed only if you entered data in the corresponding field. If at least one match is found, a grid showing the matches is displayed. If the lead being entered is indeed a duplicate and can be found on the grid, you can click the record and the lead form will be populated with the information for that lead. The information can then be edited. The campus for the lead can be changed ONLY if the campus ID for the record from the grid is in the list of campuses that you have access to. If you do not have access to the campus of the lead's record, you cannot change the campus.

To add a new student master record:

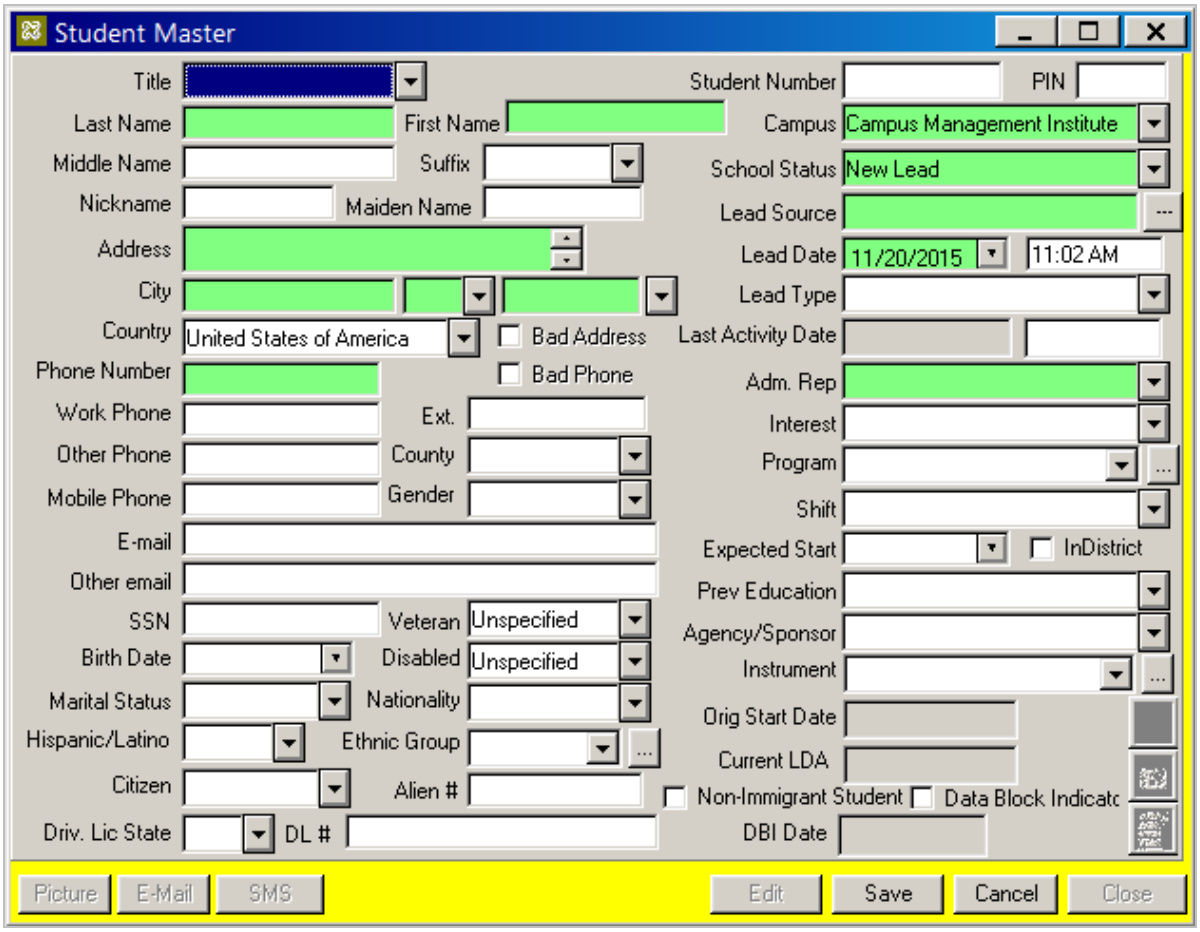
1. Click the New Student Master icon .
   Or, press **Ctrl+N**.
   Or, navigate to **File** and select **New Lead (Full)**.
   Or, press **Alt+F** and then press **N**.

   A blank Edit Student Information form is displayed. The format of the form depends on the System Setup option that chooses the long form or short form.

Student Master - Long Form



Student Master - Short Form



2. Enter the information about the new person. Select an option from each list box on the form. Note that your school may have designated some of the fields on the form as required. The required fields are colored differently than other fields on the form. When you save the form, the program displays a message if you don't provide required information. See the Student Master Fields Table for information about all fields on the Student Master and Edit Student Information forms.
3. Click **Save** to save the information about the new lead or student. When the save procedure is completed, the Edit Student Information form is closed and the Student Master form is displayed.

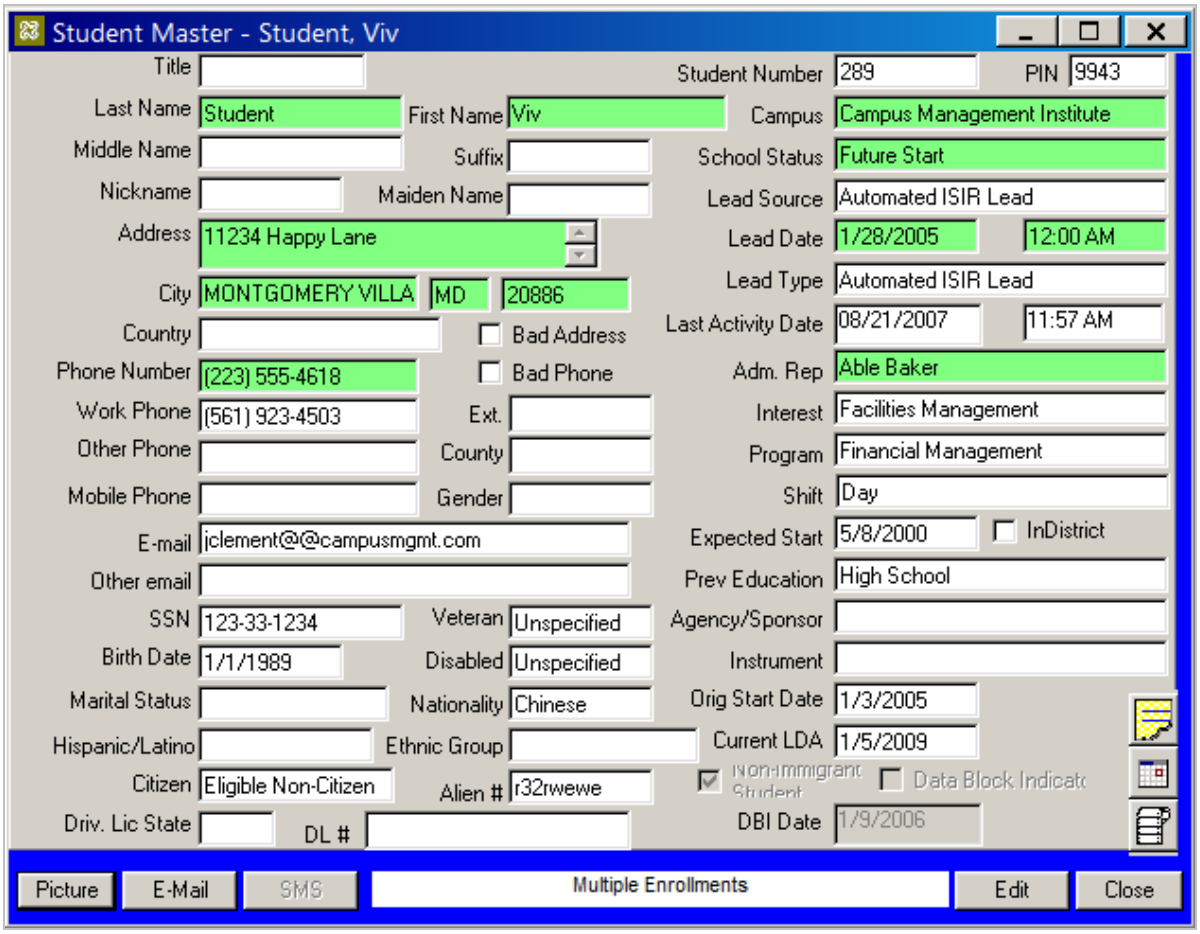
Editing a Student Master Form

Once an Student Master record has been added to CampusNexus Student, you can select and edit it. This optional feature is controlled by a System Settings option labeled Student Form.

Note: If a user changes the student's campus, the lead source value remains. CampusNexus Student keeps the original lead source, even if it is not valid for the new campus.

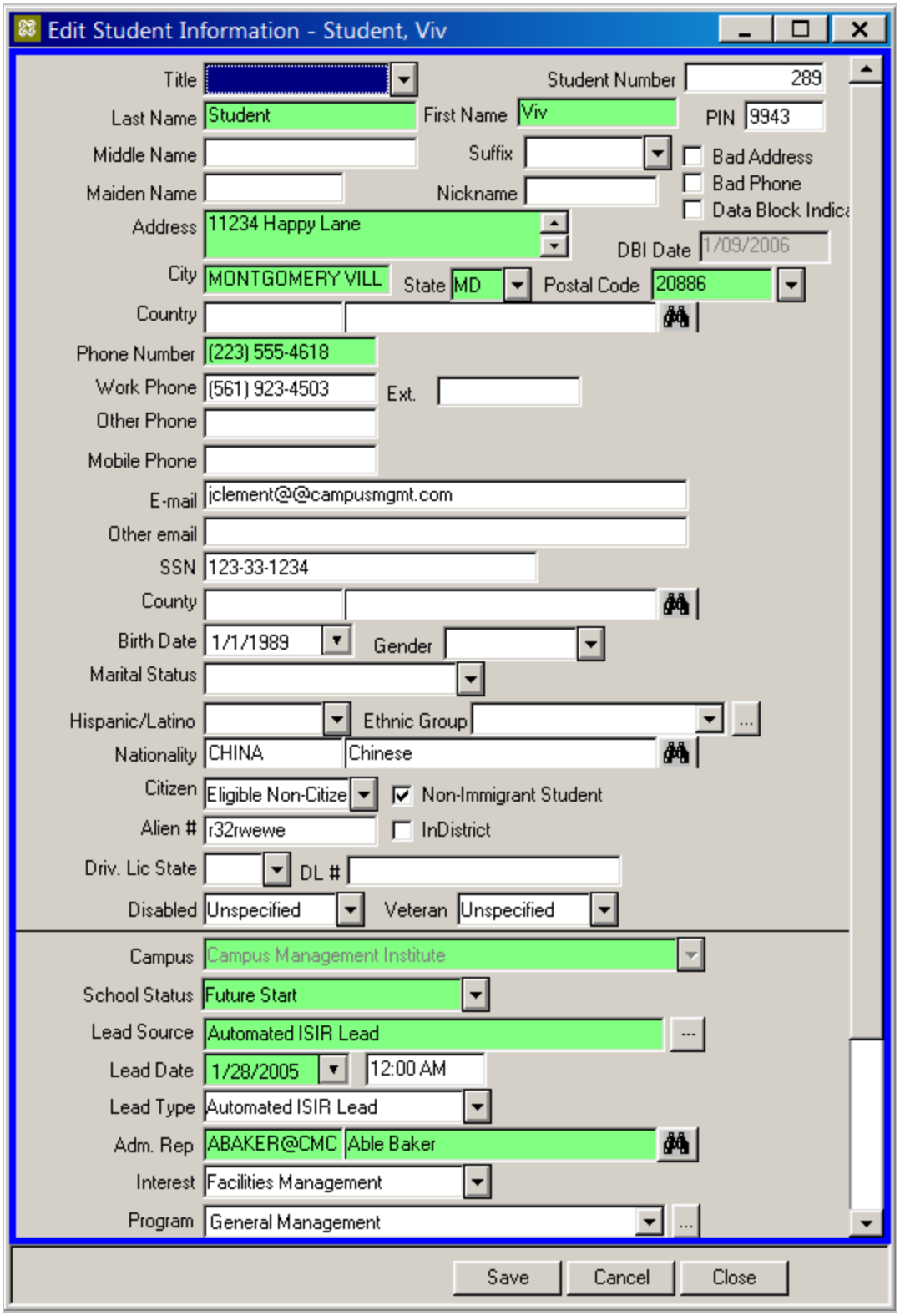
To edit a Student Master form:

1. Find the student whose form you want to edit, or select the student from the **Recent Students** list box. The selected Student Master form is displayed.



2. Click **Edit**.

   If the Long Student Form is enabled in Setup > System Settings, CampusNexus Student displays the long Student Master form for editing. Otherwise, the fields are available for editing on the short form.



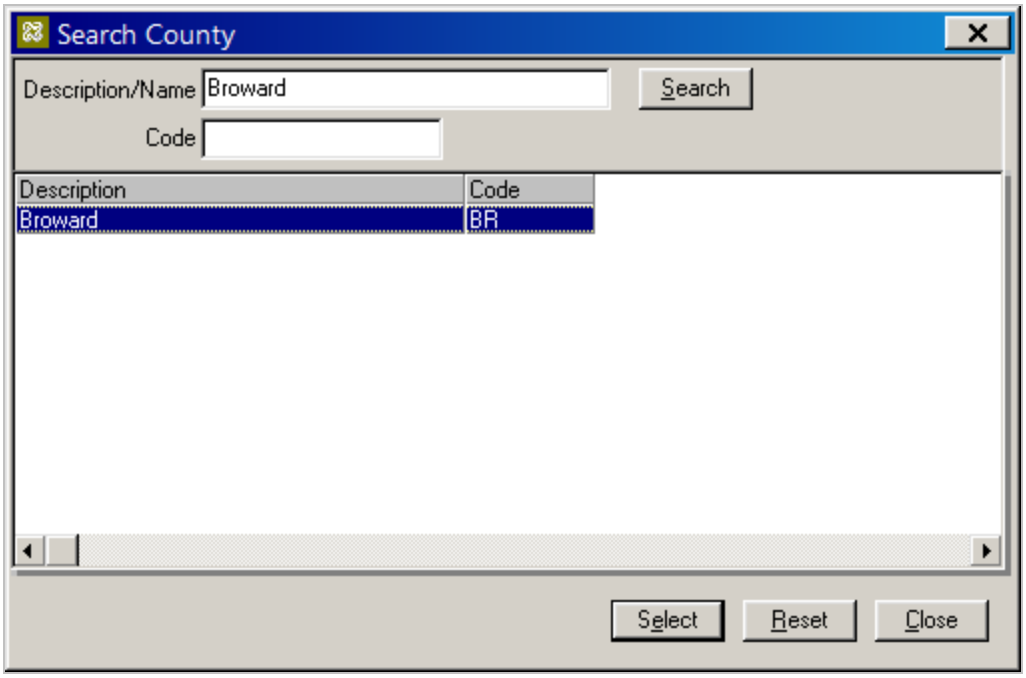
- List Boxes

  The list boxes on Edit Student Information form contain choices that you can make to describe the lead or student. These choices are set up on lists in the Admissions module and other modules. If you find that you

need a choice that is not on a certain list, contact your manager or system administrator and request that it be added to the list.

- Search Icons

  Click , for example beside the County field, to find an appropriate selection.



  The search form requires that you specify at least part of the Description or Code before you click Search. Once the list of items is displayed, select one and click **Select** to enter it in the related student master record. CampusNexus Student closes the form when you select a listed option. Click **Clear** to start a new search. Click **Close** to close the form.

3. Enter the additional or changed information about the student. If necessary, select options from the list boxes on the form. The required fields are usually colored differently than other fields on the form. For a complete list of field on the student master form, refer to Student Master Fields.

   - **Bad Address**. Select this check box if you find that the current address on file for the student is incorrect.
   - **Bad Phone**. Select this check box if you find that the telephone number on file for the student is incorrect.

4. If you update the **Lead Type**, **Lead Source**, **Program**, or **Interest** fields, and CampusNexus Student is set to track multiple inquires, a dialog box is displayed asking if you want to update these fields in the Student Inquiry. Select **Yes** to update the inquiry record, ensuring that the inquiry and Student Master are synchronized. Select **No** and the inquiry record will not be updated with the changes in these fields.

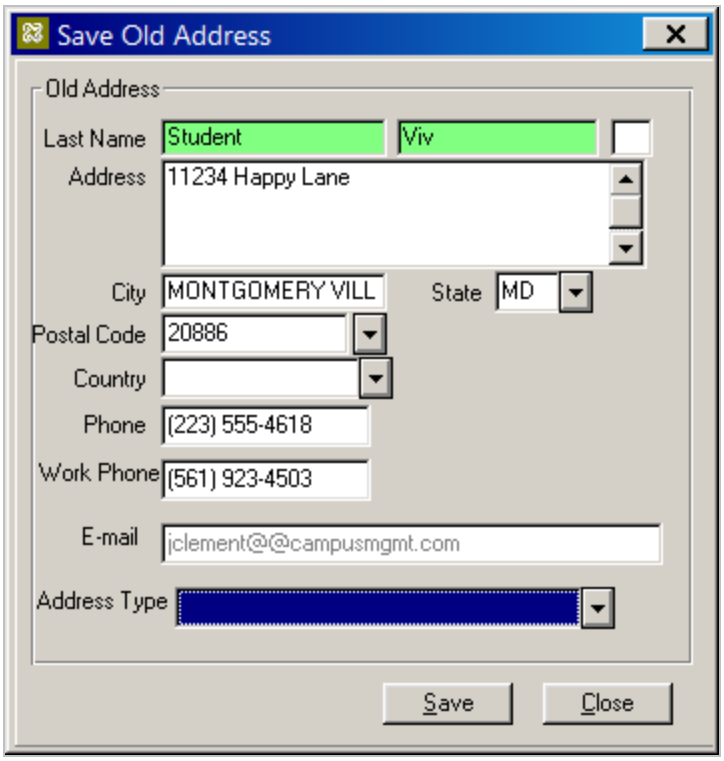
5. Click **Save**.

Address Change

See Save Old Address instructions to save the previous address.

Save Old Address

If you change the student's address information in the Edit Student Information form, the Save Old Address form is displayed. If you do not want to save the old address, click **Close**.



To save the previous address information:

1. Verify that the address information is correct.
2. Edit appropriate fields.
3. Select an **Address Type**.
4. Click **Save**. The previous address will be added to the list of other addresses for the student.
5. Click **Close** to close the form.

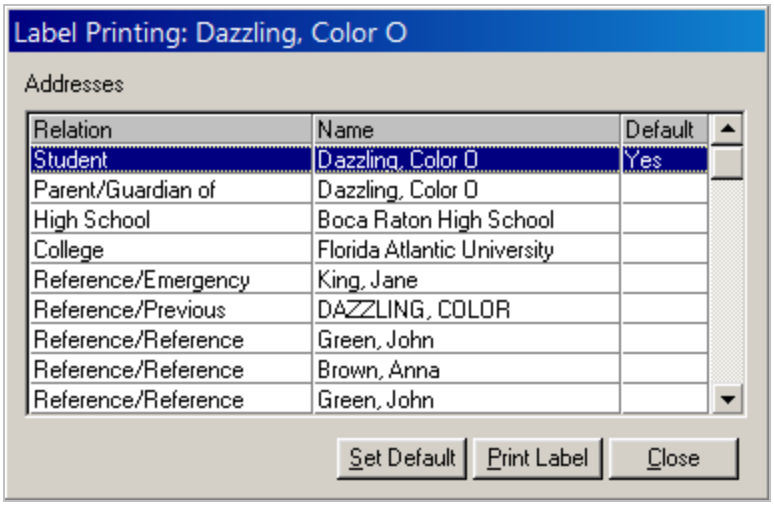
Print Address Labels

You can print a label for any address associated with a student. You can designate one of the addresses as the student's default address. Be sure that your label printer has been set up by your system administrator before trying to print a label.

To print a label:

1. Select a student.
2. Open the Student Master form.
3. Click **Print Labels** to see a list of addresses for the student.

   Some of these addresses are entered from Contact Manager on the View menu. The High School address comes from the selection on the Education form in Admissions. The Parent/Guardian address is derived from the student's primary address on the Student Master form.



4. Select the row for the label you want to print.
5. Click **Print Label**. One label is printed on the designated printer for each address you select.
6. Click **Close** to close the form.

For instructions on completing the Addresses form, see View > Contact Manager > Addresses.

Comments

When you are viewing the Student Master form, you can enter comments related to the selected student. The comments field is virtually unlimited in size and can contain any text. Refer to your school's policies and procedures for the types of information to record here.

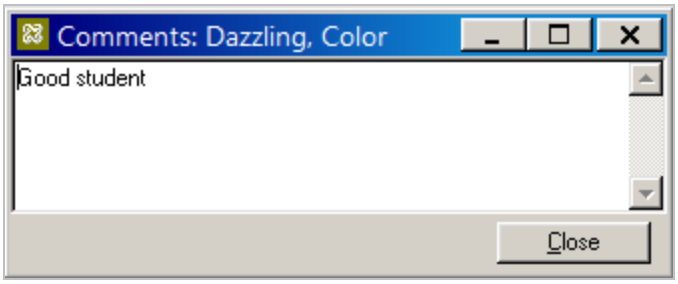
Remember that you can use Contact Manager to capture detailed activity and comments about any given student. Contact Manager can be a better format for organizing contact information and comments about a given student.

To add or view comments related to a selected student:

1. Select a student.
2. Open the Student Master form.
3. Click the **Comments** icon.

   - The Comments icon looks like this when there are no comments on file.
   - It looks like this when there are comments on file.

   The Comments form is displayed.

4. Use the Scroll bar to navigate up and down the existing comments, if any.
5. Place the insertion pointer anywhere in the comments box that you want to add additional comments and type your new text. Since the comments are free-form in nature, add a date and user name to identify when the comment was entered and by whom.
6. Click to close the Comments form or press **Ctrl+F4**. If you have changed the comments, you are prompted to save your changes.
7. Press **Enter**, type **Y**, or click **Yes** to save your changes.

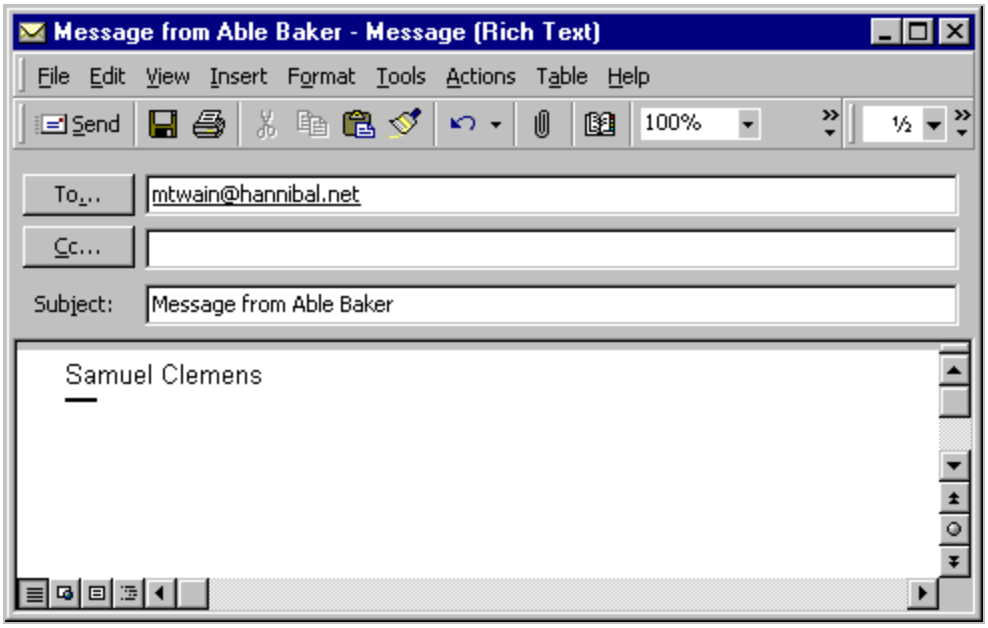
E-Mail

The E-Mail Button on the Student Master form opens a new email message addressed to the student. This feature is enabled when you enter an e-mail address in the student's master record.

Note: The email feature in CampusNexus Student requires that you have Microsoft Outlook available on your workstation. If your network uses terminals (Winterms) and a terminal server (Citrix), Outlook must be available on the server.

To send an email to a student:

1. Select a student.
2. Open the Student Master form.
3. Verify that an email address is recorded for the student. If the E-Mail button is dimmed, there is no e-mail address on file for the student. If you know the e-mail address for the student, enter it before attempting to send a message.
4. Click the **E-Mail** button. An e-mail message form is displayed on your desk top. Some fields are filled in with data from CampusNexus Student.



5. Enter the message information, e.g., Subject, CC list, and the body of the message.
6. Click **Send** to send the message to the student. The form closes automatically when the message is sent.

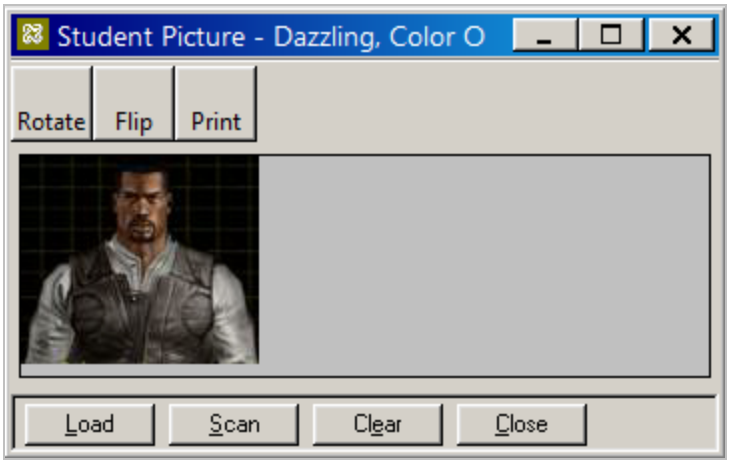
Student Picture

You can import digital images of your students into CampusNexus Student and display them when needed. When they are imported, the pictures are stored as bitmaps in a CampusNexus Student database.

Note: The Student Picture form is also accessible from the Student Master form.

To work with student pictures:

1. Select a student.
2. Navigate to **View > Student Bar > Contact Manager > Student Picture**. The Student Picture form is displayed. If a picture has already been imported for the student, it is displayed on the form.



3. Click **Load** to import a picture from a file. When you click Load, CampusNexus Student opens a directory search form. Use it to find the image you want to import.
4. Click **Scan** to open your scanner software and import an image from a scanner attached to your computer or on your network. When you click Scan, CampusNexus Student looks for Twain compliant applications on your computer. If there is more than one, select one to open. When the image is scanned, choose an option in the scanner application to export it to CampusNexus Student.

   Note: We recommend that you edit, crop, or size the image before you import it. Once it is imported, you cannot change anything except its orientation on the Student Picture form.
5. Click **Clear** to clear an existing picture of the student from the form and from the database.
6. Click **Close** to close the Student Picture form and save any changes you have made.
7. Click **Rotate** to rotate the image by 90 degrees.
8. Click **Flip** to turn the picture upside-down.
9. Click **Print** to print a copy of the student's picture. The picture is enlarged to just fit on an 8.5" x 11" sheet of paper.

Deleting a Lead-Student

In rare instances it may be necessary to delete a lead or student master record and all related records.

For a lead or student to be deleted:

- The person performing the deletion must be in a staff group that has Delete Permission in Security Setup.
- There must be no financial transactions on file for the lead or student.
- A student must not be enrolled in a program version. (It is possible to remove an enrollment if classes are not scheduled or grades have not been recorded.)

To delete a lead or student record set:

1. If the delete conditions described above are true, select the lead or student master record to be deleted. Be absolutely sure that the lead or student master to be deleted is the currently active form in your work area.
2. From the **File** menu, select **Delete**. A confirmation message is displayed.
3. Click **Yes** to permanently remove the lead or student record from the CampusNexus Student database. Data for the selected student can no longer be viewed or recalled in CampusNexus Student.

   Click **No** to stop the deletion and keep the record in the database.

Find Menu

The Find menu provides two options that can be used to find individual students or a group of students that were found in an earlier search and saved as a group.

- Select **Student (Ctrl+F)** to search for an individual student or a group of students using the Search tab or the Advanced tab of the search tool.
- Select **Next Student (F3)** to switch to the next student in a group of students. Data for the next student will populate a form like the one with which you are working.

Student Record Search

CampusNexus Student provides extensive student record search features. The **Find > Student** (Ctrl+F) menu option opens a dialog box with three tabs.

Search Tab

The Search tab is used to find one student or a group of students by Campus, Student Number, SSN, Last Name, or First Name. The fields displayed in the search result can be customized.

Wildcard searches are supported. The underscore character (_) replaces one character in the search field. The percent character (%) replaces a string of characters.

Advanced Tab

The Advanced tab is used to find groups of students having the same characteristics. Up to six search parameters can be defined. The search parameters are created by selecting fields and specifying values for each field.

Groups Tab

The Group tab is used to create groups based on the students found using the Search tab or Advanced tab. The groups can be saved and reloaded on demand. The Groups tab also allows updating groups by adding, replacing, or deleting students.

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Finding a Student Master Record From the Search Tab

You can find students from the Search tab of the Search form, using all or part of a student number, SSN, last name, or first name. The Search tab also allows you to customize the fields to be displayed in the search results list.

To find student records using the Search tab:

1. Use one of the following methods to open the Search tool:
    - Click the Find icon on the toolbar.
    - Press **Ctrl+F**.
    - From the **Find** menu, select **Student**.
    - Double-click any open space in the work area.
    - Right-click an open space in the work area and select **Find Student**.
2. Click the **Search** tab. The Search form displays any previously used search criteria.

    Note: If you click the **Reset** button, the search parameters on the Search tab and on the Advanced tab are cleared with the exception of the default campus in the Campus drop-down on the Search tab and the Group listing on Groups tab.
3. Click the **Advanced** tab and check for search parameters that may be left over from previous searches. Clear any unwanted parameters by selecting the **<none>** option from the drop-down list.
4. Click the **Search** tab again and select a **Campus** in which to search. If yours is a multi-campus institution and you have permission, you can search all campuses.
5. Enter the known search criteria, for example, the student's last name, first name, or SSN.

    The SSN and the name fields accept wildcard characters. The underscore character (_) replaces one character in the search field. The percent character (%) replaces a string of characters. For example, if you enter "%Donald" in the last name field, the query find students named McDonald, MacDonald, and O'Donald.
6. Click the **Search** button. The query returns a list of all student records that meet your search criteria.

    Note: Students having more than one enrollment are listed once for each enrollment if **Enrollment #** has been selected as a display column in the search results grid.
7. Review the search results and proceed as desired.
    - **Double-click** a line to open the associated Student Master form.
    - Click the **Advanced** tab to refine the search.
    - Click the **Groups** tab to save the search results as a student group.
    - Click **Cancel** to close the form.

Customizing the Search Results Grid

There are two ways in which the search results grid on the Search form can be changed.

(1) The system administrator (SA) can customize it through a Setup option.

(2) If you have been given permission via a Setup option, you can customize search results grid yourself.

To customize the search results grid:

1. On the Search form, click **Customize**. The Customize Search Form is displayed.
2. Select or clear the optional data columns to be displayed in the search results grid.
3. Click **OK**. Your selections are saved and the form is closed.

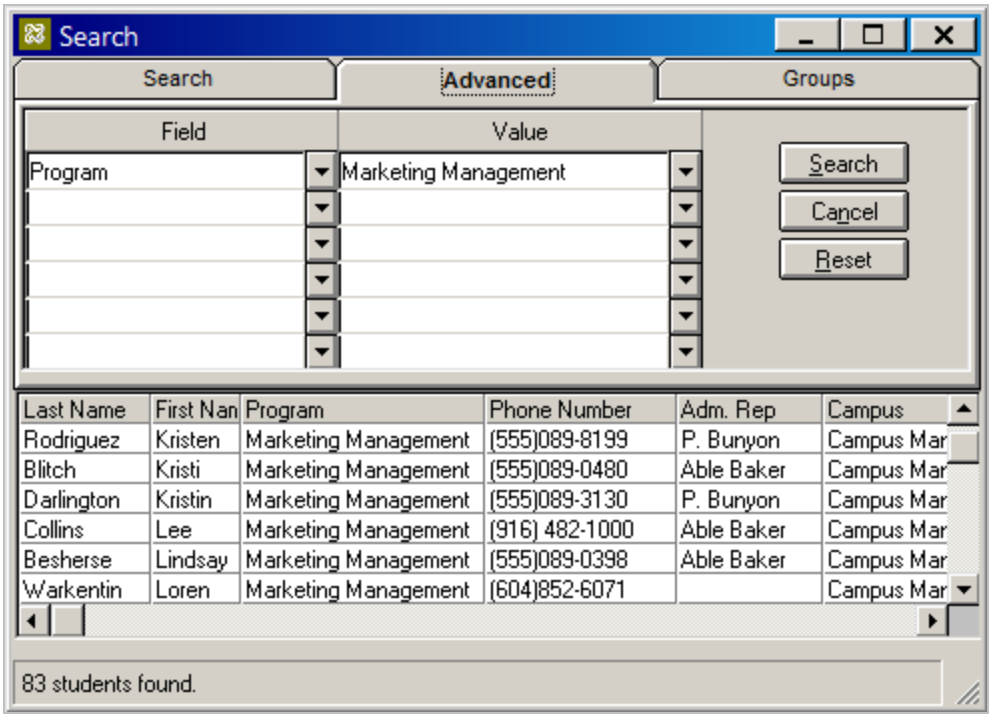
Finding Student Records From the Advanced Tab of the Search Form

You can use the Advanced tab of the search tool to define school-specific search parameters. The search parameters can be a combination of up to six fields and their associated values. The search results can be saved as a group.

To find student records using the Advanced tab:

1. Use one of the following methods to open the Search tool:
   - Click the Find icon .
   - Press **Ctrl+F**.
   - From the **Find** menu, select **Student**.
   - Double-click any open space in the work area.
   - Right-click an open space in the work area and select **Find Student**.
2. Click the **Search** tab. The Search form displays any previously used search criteria.

   Note: If you click **Reset**, the search parameters on the Search tab and on the Advanced tab are cleared with the exception of the default campus in the Campus drop-down on the Search tab. The Group listing on the Groups tab also is not cleared.
3. On the Search tab, select **All Campuses in Database**, **Group: All Campuses**, or one campus. Enter any other parameters that apply to the new search.
4. Click the **Advanced** tab and check for search parameters that may be left over from previous searches. Clear any unwanted parameters by selecting the **<none>** option from the drop-down list.
5. Select the search parameters from the drop-down lists in the **Field** column. For each field selected, enter or select a value in the **Value** column. You can combine up to six search fields.



6. Click **Search** . All student records that meet your search criteria appear.
7. Review the search results and then:
    - **Double-click** each student record to open the associated Student Master form.
    - Click the **Groups** tab to save the search results as a student group.
    - Click **Cancel** to close the form.

Advanced Search Fields

The Advanced tab of the search tool provides six drop-down lists of fields that can be searched. The user can specify the values for each field. The combination of up to six fields and their associated values can be used to find a group of students having the same characteristics.

Several input fields accept wildcard characters. The underscore character (_) replaces one character in the search field. The percent character (%) replaces a string of characters. For example, when you are searching for e-mail addresses, if you enter "ab%", the query returns all students with e-mail addresses that begin with "ab".

Field Values

Field	Value
Adm. Rep.	List of names of administration representatives
Adult Student Goals	<input field> (wildcards allowed)
City	<input field>
Country	List of countries
Current FA Grade Level	List of available grade levels
Diploma Name	<input field> (wildcards allowed)
E-mail	E-mail address (wildcards allowed)
Former Roommates	<input field> (wildcards allowed)
GPS	<input field>
Honors	List of available honors
Lead Source	List of available lead sources
License Plate	<input field>
Maiden Name	<input field> (wildcards allowed)
Middle Name	<input field> (wildcards allowed)
Nickname	<input field>
Parking Space	<input field>
Phone Number	<input field> (wildcards allowed)
Program	List of available programs
School Status	List of available statuses
State	<input field> (allows two characters)
Steno Machine SN	<input field>

Saving and Loading Student Groups

Once a group of students has been found using the Search or Advanced tab, you can save the group and, at a future time, you can select the group and "reload" it. You can also update a group by adding, deleting, or replacing students.

To save a group of students:

1. Click**Find > Student**. Use the **Search** tab or the **Advanced** tab to find the student records to be grouped.
2. When the desired list of students is displayed, click the **Groups** tab.
3. Click **Save**. The Save New Group dialog box is displayed.
4. In the **Group Name** box, type a name for the new group.

   Optional: Select **Make Group Public**, **Make Group For Portal Content**, and choose a date for the group to expire.
5. Click **OK**. A confirmation message is displayed.
6. Click **OK** to acknowledge the message. The group name is added to the list of available groups.

After the group is saved, you can select the Student Groups option on the **View** menu to specify characteristics of the group, for example, public or private, dynamic, static, frozen, or manual.

Loading a Group

Once a group has been created, you can load it in the Groups tab.

To load a group of students:

1. Select **Find > Student** to open the search tool.
2. Click the **Groups** tab.
3. Select the Group you want to load from the **Groups**list.
4. Double-click the list or click **Load**. The list of students in the group displays in the lower portion of the dialog box.

Updating Student Groups

Once a group of students has been created, you can update the group by adding, replacing, or deleting students.

Adding Students or Replacing All Students in a Group

To add students to a group or to replace all students in a group:

1. Navigate to **Find > Student**. Use the **Search** tab or the **Advanced** tab to find one or more students to be included in the update.
2. Click the **Groups** tab.
3. Select the Group you want to update from the **Groups** list.
4. Click **Update** to display the **Add Students to Group** dialog box. The group you selected in the previous step is displayed by default, but you may select any other group by using the drop-down list.

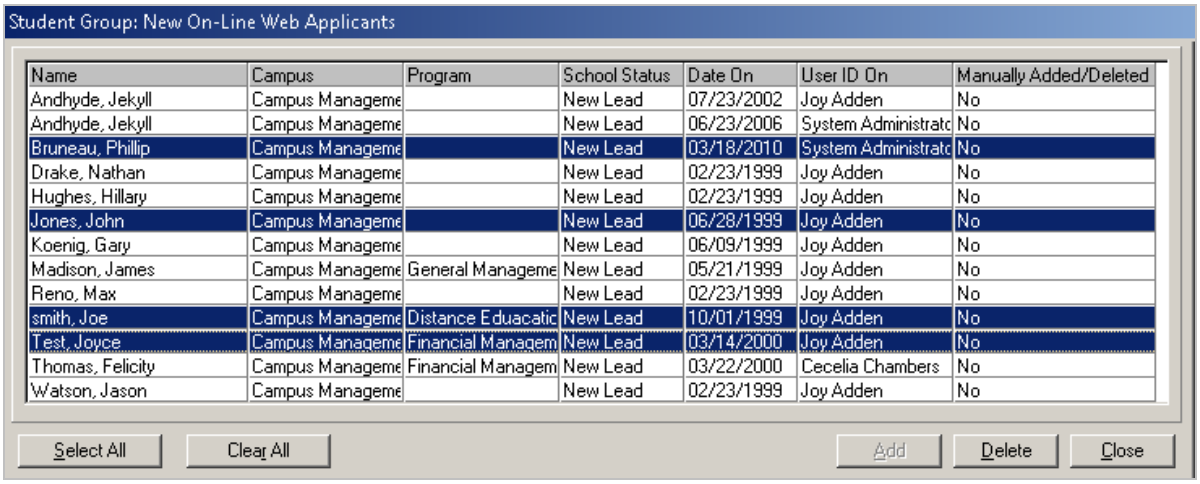
   Note: Only active, non-expired groups are automatically populated.
5. If applicable, select the **Replace All Students in Group** check box to replace all students in the group with the students listed in the search results. If this option is selected, all students previously associated with the group are deleted from the group. If this option is not selected, the students from the search results are added to the students in the group.
6. Click **Save** to update the student group.
7. If the selected group was a non-manual group, you are prompted to confirm the change.
   - Click **Yes** to change the group type to Manual for the selected group.
   - Click **No** if you do not want to change the group type to Manual for the selected group.
   - Click **Cancel** to terminate processing without making any changes.

Deleting Students from a Group

To delete students from a group:

1. Select **Find** > **Student**.
2. Click the **Groups** tab.
3. In the **Groups** list, select the Group from which you want to delete students.
4. Click **Delete** to display the **Delete Students from Group** form. The group you selected in the previous step is displayed by default, but you may select any other group by using the drop-down list.

   Note: Only active, non-expired groups are automatically populated.
5. Click **Save**to remove all students from the group. In this case, the relationship records are deactivated, but not physically deleted.
6. To selectively remove one or more students from the group, click the **View Students** button to display a list of all students in the group.



Using **Select All, Clear All** and **Ctrl-click** for multiple selection as needed, select the students to be removed from this group.

Note: When this form is opened from the student search, the Include Removed Students check box is not visible on the form.

7. Click **Delete** to delete the selected students from the group.
8. If the selected group was a non-manual group, you are prompted to confirm the change.
    - Click **Yes** to change the group type to Manual for the selected group.
    - Click **No** if you do not want to change the group type to Manual for the selected group.
    - Click **Cancel** to terminate processing without making any changes.

Next Student

From the **Find** menu, you can open forms for the next student in a group of students that you have previously found or loaded as a group.

To use the Find Next Student feature:

1. Find or load a group of students.
2. Open a form such as Admissions Summary, Addresses, and so on, in which you want to see student data. If you are not currently working in a form, the Student Master form is displayed.
3. Double-click a student on the list to access the data for the student. The Student Master form opens if no other form is already open. If another form is active in the work area, data for the selected student is displayed on the form.
4. When you are ready to see data for the next student, press the **F3** key or select **Next Student** on the **Find** menu.

Note: As you repeat the Find Next Student procedure, the previously accessed forms remain open in your work area. Close each form before accessing the next student.

View Menu

The View menu enables you to view and edit student information in CampusNexus Student and to select view settings for the toolbars.

The submenus are organized by departments. The department options are also available on the Student Bar. If a user does not have access to items in the View menu, the Student Bar is cleared.

- Contact Manager
- Admissions
- Financial Aid
- Student Accounts
- Academic Records
- Career Services
- Loan Management
- Student Services
- Housing

Select Student Groups to create and work with different types of groups.

View and edit your Session Defaults including the campus, term, and FA year with which you are working.

Select show or hide options for the following toolbars:

- Student Bar
- Toolbar
- Status Bar
- User Toolbar

You can also Customize the User Toolbar.

View > Contact Manager

From the Contact Manager View menu, you can work with student-related records that are usually common to several departments. The options on this menu apply to the student selected from the Recent Students list.

Menu Item	Description
Student	Displays the Student Master form.
Activities	Displays a list of activities related to the student. Activities can be added, edited, and closed.
Student Groups	Displays a list of all groups of which the student is a member. The student can be added to a group or removed from a group.
Documents	Displays a list of documents related to the student. Documents can be added, edited, or deleted.
Addresses	Displays alternative addresses associated with the student. Addresses can be added, edited, or deleted.
Agency Affiliations	Displays agencies to which the student is related.
Student Picture	Displays the student's picture or facilitates the loading of one.
Transcript Request	Displays transcript requests related to the student and allows the recording of a request.
International	This menu option is only available if the campus supports international students and the selected student is designated on the Student Master form as an international student. Use this option to monitor international student data.
Contact Method	Displays the Contact Method form for selecting the preferred contact method.
Advisors	Displays all advisors for the student and defaults to the student’s most current enrollment.
FERPA	Displays FERPA student Information form.

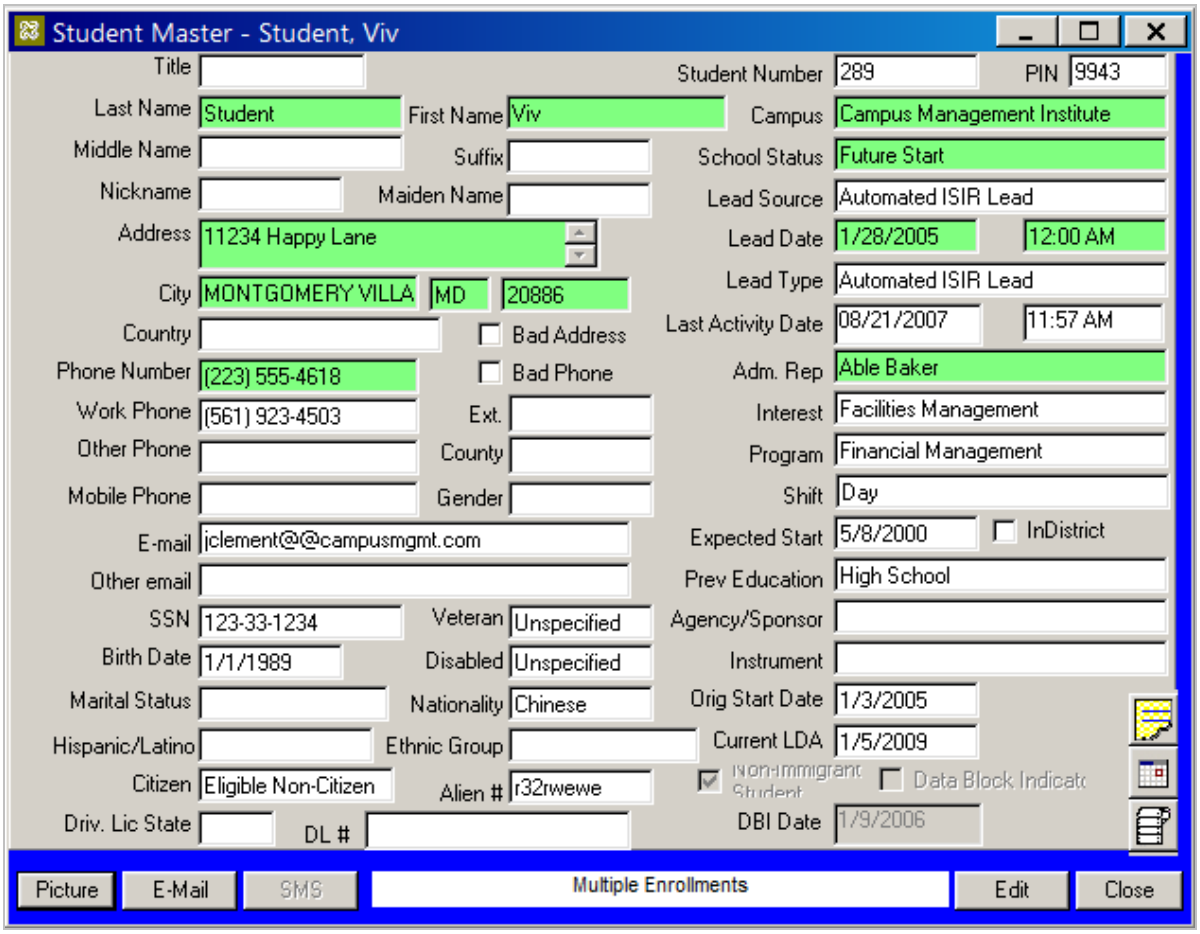
The options on the Student Bar are the same as the options on the View menu, unless the Student Bar has been altered by the user.

Student Master

The Student Master form contains much of a student's basic demographic information. The Student Master form is usually (but not necessarily) populated in the Admissions module by adding a new lead to the database. New leads are entered using the Quick Lead Entry form or the Add New Lead **Ctrl+L** option on the File menu. The **Ctrl+N** key combination can also be used to start a new Student Master record (form) without entering a quick lead.

To view a Student Master form:

1. Select one of the following options:
    - Click **Student** on the Student Bar.
    - Double-click **Recent Students** on the Toolbar. When you change the student in the Recent Students list, a new Student Master form is displayed. If you already have a Student Master form open, it remains open in the background.
    - From the **View** menu navigate as follows:
        - Contact Manager > Student
        - Admissions > Student
        - Financial Aid > Student
        - Student Accounts > Student
        - Academic Records > Student
        - Career Services > Student
        - Loan Management > Student
        - Student Services > Student
        - Housing > Student
    - Use the **Find** menu or click on the Toolbar to search for a student.



Note: The border color around the Student Master form indicates the student's status category. In the setup options under Setup > Status Codes > Colors Tab, your system administrator can choose colors for the status categories.

2. Multiple Student Master forms can be displayed at the same time. The forms always open in the same place in the work area. Unless you have closed, moved, or minimized a previous Student Master form, the next form you open covers the previous form.

   To move between open Student Master forms use the **Window** menu and select **Tile** or **Cascade** to organize all open forms in the work area.

   When you are working with multiple students, ensure that the correct form is current (active). The name of the current student is always shown in the Recent Students text box. The title bar of the active form is always a different color than other forms which may be open in your work area.

3. To edit the information on the form, click **Edit**. See Edit a Student Master.

   Required fields on the form have a background color other than white. If a required field is blank, you must enter data in it when you edit the form, even if you did not intend to provide the information when you clicked Edit.

   Some fields are required by CampusNexus Student (Last Name, First Name, Lead Date, Admissions Rep). Additionally, your institution may designate other fields as required. The system administrator can mark fields as required in either of two ways.

- Open any Student Master (or Quick Lead) form and go to Setup > Required Fields.
- Designate the field as required in the Data Dictionary.

4. To add an activity from the Student Master form, click the **Add Activity** icon at the bottom right of the form. The Activity form is displayed.
5. Click **Close** (Ctrl+F4) to close the active Student Master form. If you are in edit mode when you click Close, you are prompted to save any changes.

Duplicate Student Records

CampusNexus Student checks for duplicate Student Master records when new leads or students are added. The following table columns are used to check for duplicates:

- Student ID
- Social Security Number
- Phone Number
- Date of Birth and Student Name (combined)
- Driver's License Number
- E-mail address.

Each check is performed only if you entered data in the corresponding field. If at least one match is found, a grid showing the matches is displayed

If the lead is a duplicate and can be found on the grid, click the record and the lead form is populated with the information for that lead. The information can then be edited. The campus for the lead can be changed only if the campus ID for the record from the grid is in the list of campuses to which you have access.

Contact Manager Security Policy

The Contact Manager Security Policy applies to the Edit Activity and Close Activity permissions on the Contact Manager form and Contact History form.

See also Activities Policies Setup and Staff Member Policies.

Contact Manager Form

The Contact Manager form, which displays a user's activities (to do list), uses the Contact Manager (CM) Security Policies. You can display the activities for other users as specified in the CM Policy. You can also list the Activities for ALL users. When the ALL users check box is selected, all activities for all users to which the user has read access are listed. The first column of the list changes to display the user to whom the activity is assigned. The **Edit Activity** and **Close Activity** buttons are enabled or disabled depending on the policy settings.

When an activity is closed and you change the student's status, the Status Change table is updated. A row is added to the Status Change table when the Change Student Status check box is selected, and the selected status is different from the student's current status.

If Contact Manager Policies are enabled, the Contact Manager security policy assigned to you controls the adding of a new activity. You can only assign activities to staff members listed in the drop-down list. Only Activity Types authorized by the policy are listed. If Contact Manager Policies are not enabled, you can only assign the activity to yourself and all "active" Activity Types are listed.

Contact History Form

This Contact History form, which displays all activities for a student, uses the Contact Manager security. If the institution uses Contact Manager Policies, the **Edit** and **Close Activity** buttons are disabled or enabled depending on the policy assigned to the user who is signed in. A logged-in user can always edit or close an activity that is assigned to him or her. A logged-in user is authorized to edit or close an activity that is assigned to a user in the groups designated in the policy. The Activity Type is checked against the security policy and the logged-in user can only edit and close activity types that the policy indicates.

The label at the top of the form varies according to the types of records gathered for the selected student. When the user opens the form, the label for the left field changes to indicate whether the selected student has applicant or enrollment records or both. All existing records are gathered into the drop-down list. The left field is labeled **Applicant**, **Enrollment**, or **Applicant/Enrollment** depending on whether the student has:

- No records - label: **Enrollment**
- One or more enrollment records - label: **Enrollment**
- One or more Applicant records - label: **Applicant**
- Both Applicant and Enrollment records - label: **Applicant/Enrollment**

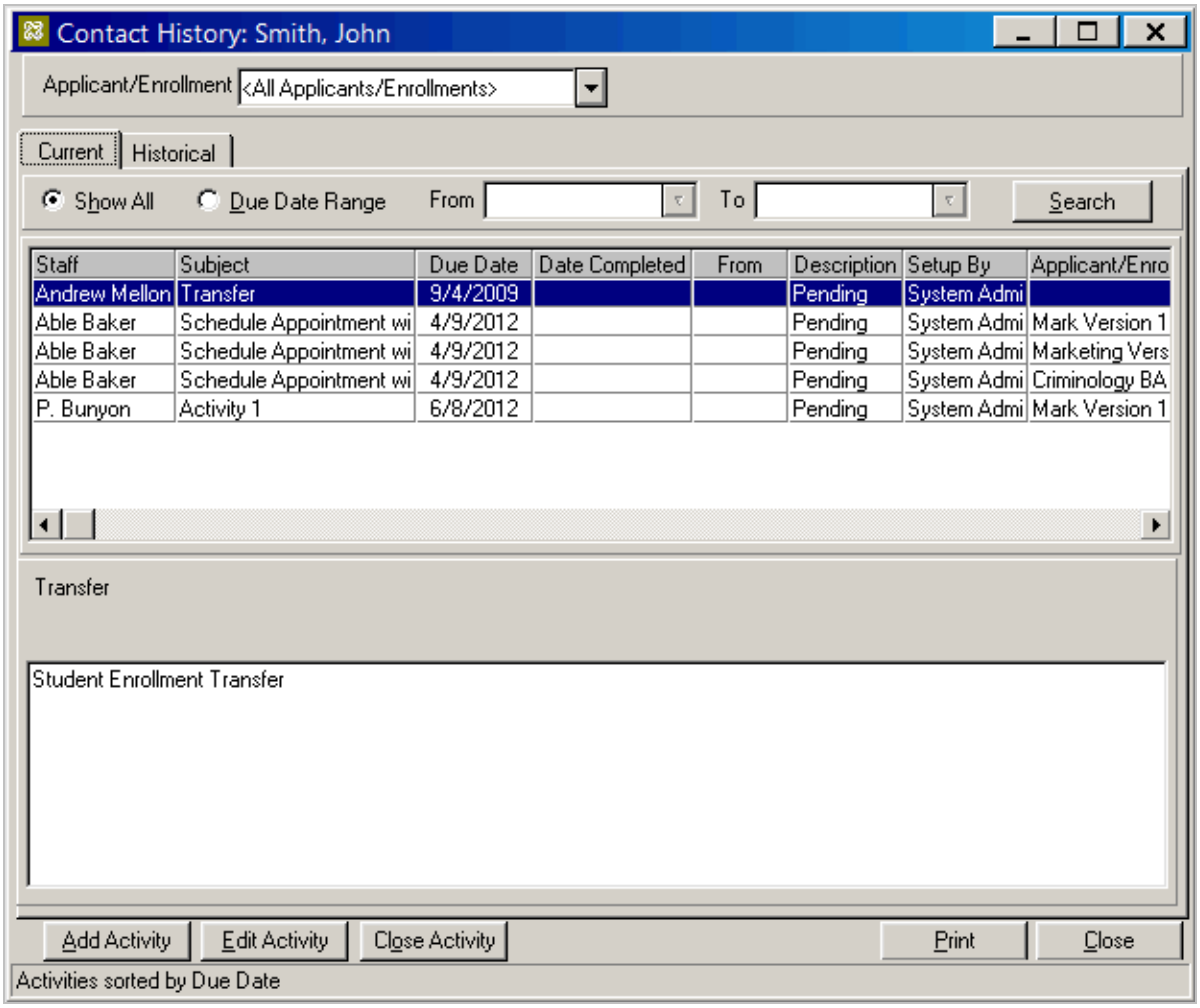
Contact History Form

Activities are created and maintained via the Contact History form, which displays a list of outstanding activities (contacts) related to the selected student. See Contact Manager form for details about working with Contact Manager.

Your institution's policy determines how long an activity remains visible in the Current tab of the Contact history form. Activities no longer considered current are viewable in the Historical tab. See also Admissions Settings.

To view, add, edit, or close activities for a student:

1. Select a student.
2. Navigate to **View** > **Contact Manager** > **Activities**. The Contact History form is displayed. By default, all applicants/enrollments and all activities regardless of their due dates are displayed.

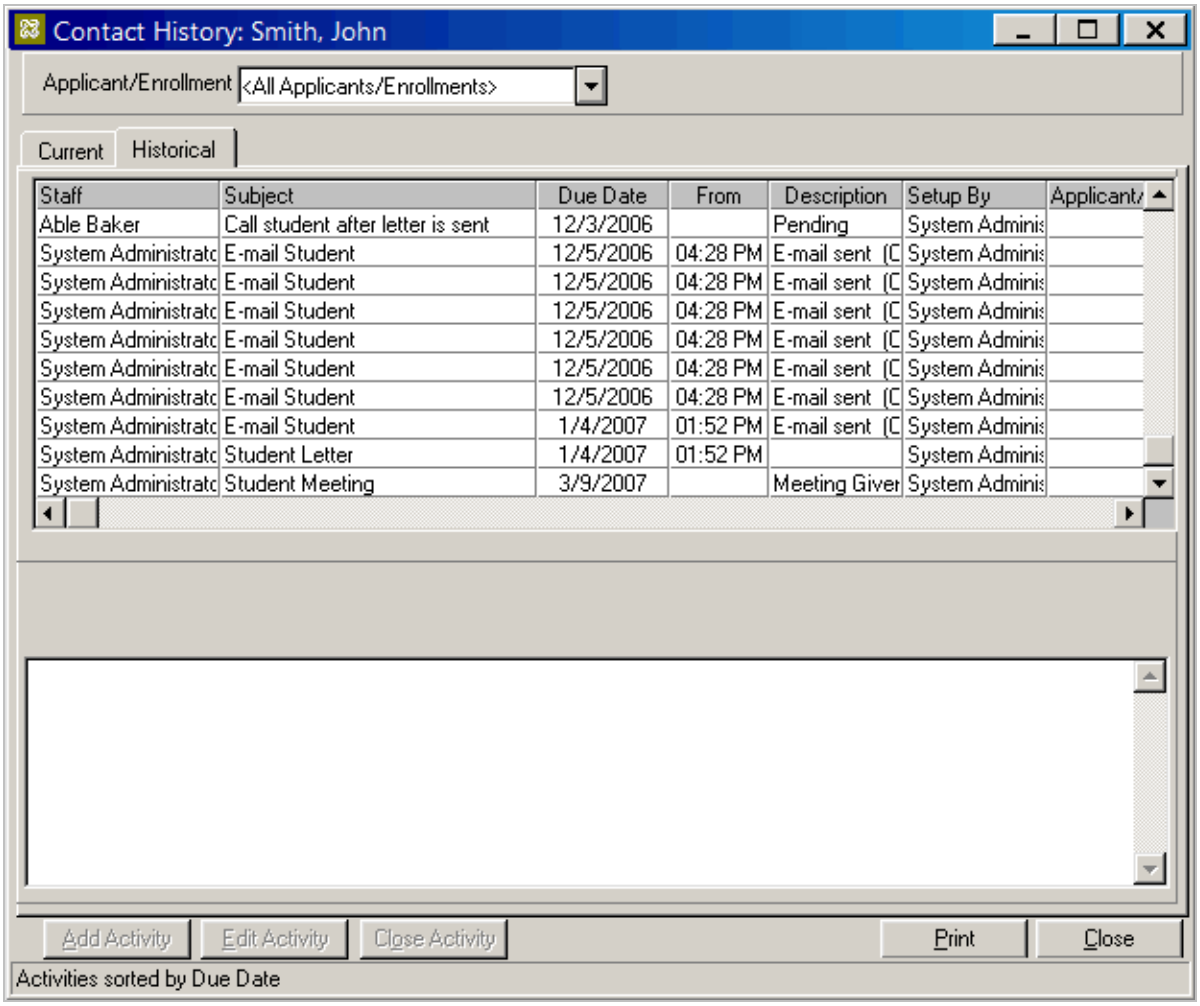


3. To filter activities by applicant or enrollment, select an option from the **Applicant/Enrollment** list.
4. To filter activities by due date, select **Due Date Range**, specify dates in the **From** and **To** fields, and click **Search**. The 'From' date must be an earlier date than the 'To' date.

   To clear the due date range filter, select **Show All** and click **Search**.

5. Sort the activities in ascending or descending order by clicking on the column headers. The selected sort option is displayed at the bottom of the form.
6. Select an activity in the grid to view associated comments.

   Note: If an activity is employer-related, CampusNexus Student adds the employer name and address information in the Comments field.
7. To add an activity, click **Add Activity** or type **Alt+A**. See Activity Form.
8. To edit an activity, select an activity and click **Edit Activity**. See Activity Form.
9. To close an activity, select an activity and click **Close Activity**. See Closing an Activity.
10. To view activities that are no longer current, click the **Historical** tab. This form can also be accessed through the **Historical Activities** button on the Admissions Summary form.



11. Click **Print** to print the Student Activities report that contains the activities listed on the Contact History form. The Student Activities report is sorted by due date. If the 'Show All' option is active (See Staff Contact Manager Tab for setup instructions), the report displays 'All' due dates for all activities. If a specific due date range is selected, the report displays only those due dates that were indicated using the 'Due Date Range'.

The Student Activities report is also accessible via the Reports > Contact Manager menu. This report can be used to list activities for selected groups of students.

12. Click **Close** to close the form.

Activity Form

The Activity form is used to add or edit activities related to a student. To close an activity, see Closing an Activity.

When an activity record is being edited by a staff member, it is locked and cannot be viewed by other staff members. If you attempt to edit an activity that is being edited by another user, the following message is displayed: *[Staff Member Name] is currently working on this activity. Please try later.*

If you are editing an activity for a long period of time, you may see the message *This activity is set to unlock automatically within [NNN] minutes. Click Continue if you wish to continue.* If you do not acknowledge the message, CampusNexus Student will eventually end your editing session, and you may lose any changes you have made to the activity.

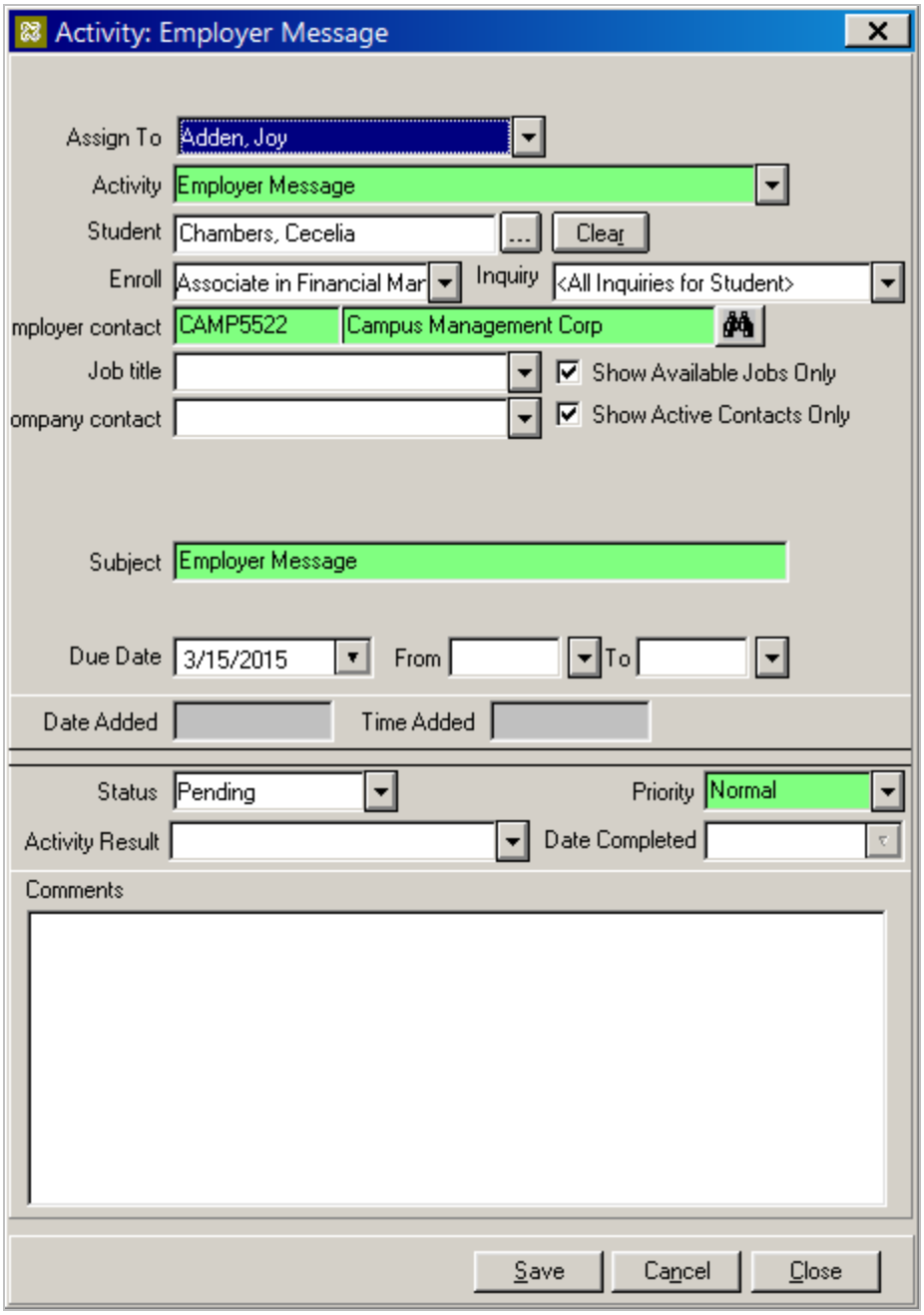
If you select an activity such as a letter with attachments that is a duplicate of an activity already on file with a status of pending, CampusNexus Student does not allow the duplicate activity to be added. (Some institutions refer to this as a duplicate fulfillment request.)

Please read the Contact Manager Security Policy before continuing.

To add or edit an activity:

1. Navigate to the Activity form using one of the following options:

   - **Student Master** > **Add Activity** (icon at the bottom right of the Student Master form). The Activity form is displayed.
   - **View** > **Contact Manager** > **Activities**. The Contact History form is displayed. Click **Add Activity** or **Edit Activity** to add or edit an activity for an individual student. The Activity form is displayed.
   - **Daily** > **Contact Manager** > **Contact Manager**. The Contact Manager form is displayed. Click **Add Activity** or **Edit Activity** to add or edit an activity on the Contact Manager List. The Activity form is displayed.



2. From the **Assign To** list, select the staff member to whom the activity is assigned. By default CampusNexus Student selects the person who is logged in. If you are authorized to assign activities to others, their names are listed.

   Permissions for activity assignments are set up by the system administrator under Setup > Staff > Activity Group Access.

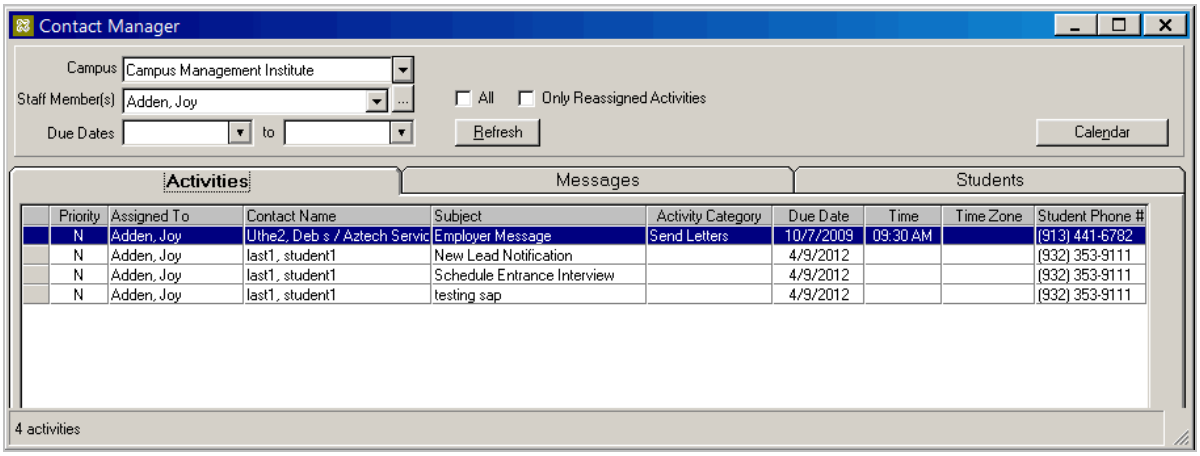
   ### Reassigning Activities

   When activities are reassigned from one staff member to another staff member, the message *Activities have been reassigned to you. Would you like to view them now?* is displayed when the staff member logs in to CampusNexus Student. This message is displayed only once. Likewise, when activities are reassigned to multiple staff members,

the message is displayed once to all members with the reassigned activities when they log on to CampusNexus Student. This is also true for multiple activities being reassigned to the same staff member, only one notification message is sent.

If activities are reassigned while the staff member is logged in, the staff member will see the activities without logging off. The notification message is not displayed the next time the staff member logs on to CampusNexus Student.

When the notification message is presented, the staff member can view the newly assigned activities. If the member decides not to view the reassigned activities and clicks **No**on the message, the Contact Manager form displays a list of all activities.



Note: By default, the **Only Reassigned Activities** check box on the Contact Manager form is cleared. When selected, the check box is displayed only when the staff member selects the Activities tab. Scroll to the right on the Activities tab to view the 'Reassigned Date'.

3. On the Activity form, select an appropriate **Activity**.
4. When the activity is selected, CampusNexus Studententers the Activity description in the **Subject** field. Change the text in the Subject field if necessary.
5. Select the **Student** to whom the activity is related. If necessary, click ... to the right of the student field and use the **Search** tool to find the student.

   Click **Clear** to change the student for this activity or to remove a previously selected student.
6. If the student enrolled in a program, select the student's enrollment from the **Enroll** list. The student's enrollments (Lists > Academic Records > Program Versions button) appear in the Enroll list. The Enroll field is not displayed for a student who has not yet enrolled.
7. If the Activity involves a student's previous inquiry about a program, select an item from the **Inquiry** list.
8. If the Activity was defined as requiring that an employer be contacted, enter an **Employer**. Search for the employer using the icon.
9. If the activity was defined as an employer-related activity, optional or required, select a **Job** and **Contact**. Select **Show Available Jobs only** to show only available jobs in the list. Likewise, select **Show Active Contacts only** to display only active contacts.
10. A **High School** field is displayed under certain conditions (see Note). When the field is visible, enter or edit the

High School.

Note: Activities involving an organization (High School) only display the High School information when accessed by navigating to:

- View > Admissions > Education > Activities (High School)
  - OR -
- Daily > Admissions > High School > Search > Edit > Activities > Add Activity.

The High School and Organization ContactID are not displayed when the activity is accessed any other way.

11. If the High School field is displayed, an **OrganizationContactID** field is also displayed (see Note). The list displays the contacts for the selected high school.
12. *(Optional)* Specify the **Due Date**, **From**, and **To** time. The 'From' and 'To' fields contain 15-minute increments between 7:00 AM and 10:45 PM. If an activity is assigned with the same date and time as a previously saved activity, a warning message is displayed when you click Save.
13. **Date Added** and **Time Added** are read-only fields.
14. *(Optional)* Select the activity **Status**.The options are:
    - Pending (default)
    - Cancelled
    - Closed
    - Follow Up
15. Select the activity **Priority**. The options are:
    - Normal (default)
    - Low
    - High
16. If the activity status you selected in the Activity Status list is considered a closed activity, select an activity result from the **Activity Result** list.
17. Enter any **Comments** about the activity.
18. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. The new activity appears on your main Contact Manager Activities list.

    Note: If an activity is scheduled at the same time as a previously entered activity, a message is displayed warning of the conflict and asking if you want to proceed.

    - When you select **Yes**, the activity is saved and both activities are scheduled at the same time.
    - When you select **No**, the Activity form is re-displayed with the information originally entered. Enter a new time to avoid a scheduling conflict.

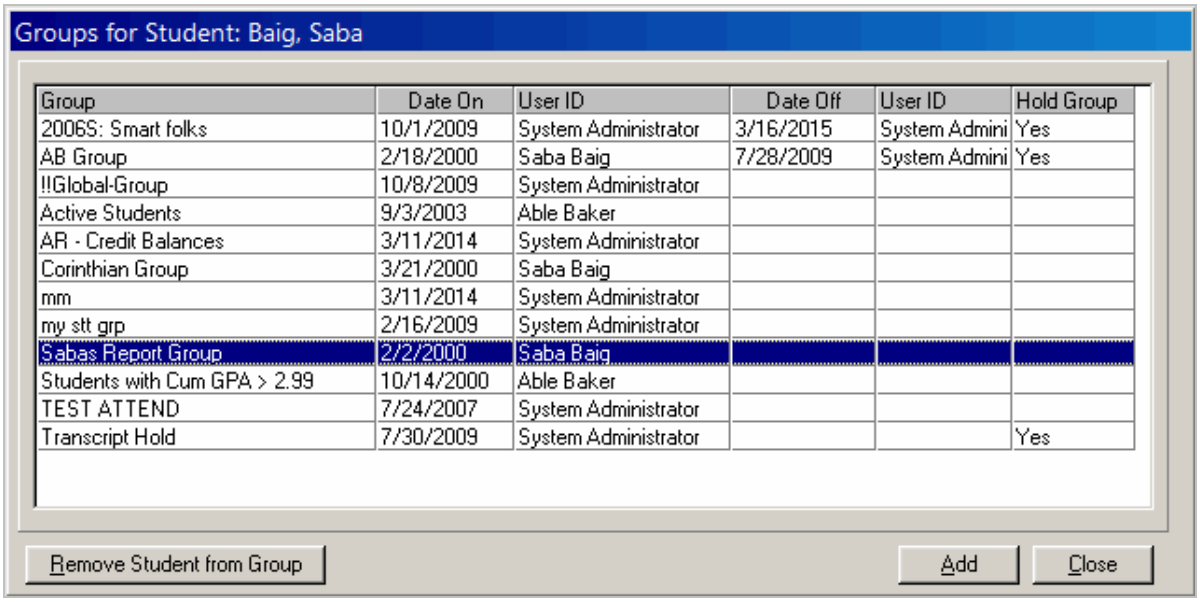
Groups for a Student

Use the Groups for Student form to view or change the group membership of a student. A student can be assigned only to existing groups created by another procedure such Search or Report Selection. Furthermore, the groups must be designated as manually maintained groups that are marked as public if the groups were initially created by someone other than yourself.

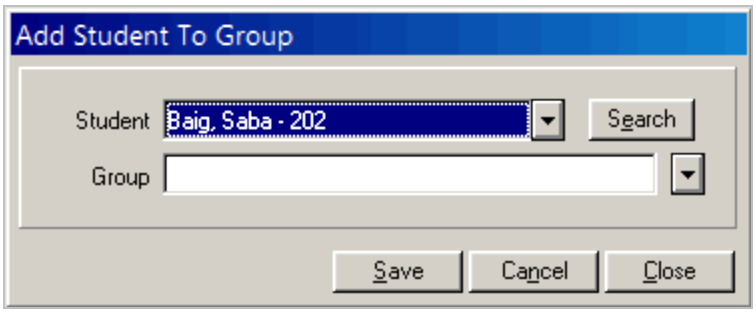
To view or edit the group membership for a student:

1. Select a student.
2. Navigate to **View** > **Contact Manager** > **Student Groups**. The Groups for Student: <student name> form is displayed.

   The Date On column indicates the dates when the student was added to a group. The Date Off column indicates the dates when the student was removed from a group.



3. Click **Add** to add the selected student to a new group. The Add Student To Group form is displayed.



3. To add a different student to a group, select a **Student** from the drop-down list or click **Search** to find the student.
4. Select a **Group**.
5. To remove a student from a group, select the group from which to remove the student.
6. Click **Remove Student from Group**.

Note: This button is available only if the Group Type is M – Manual and you have security rights to delete students from groups.

7. A confirmation message is displayed. Click **Yes**.

   The Date Off field in the student group grid is updated to indicate the date when the student was removed from the group. If applicable, the red/green "hold" light on the toolbar is turned on or off.

8. Click **Close** to close the form.

Email Activity

Use a Contact Manager email activity to automatically send the same email message to one or more students or employers. This activity presumes that email addresses are on file for the recipients of the message. An email activity must be previously defined (View > Contact Manager > Activities). You can attach documents to your email messages.

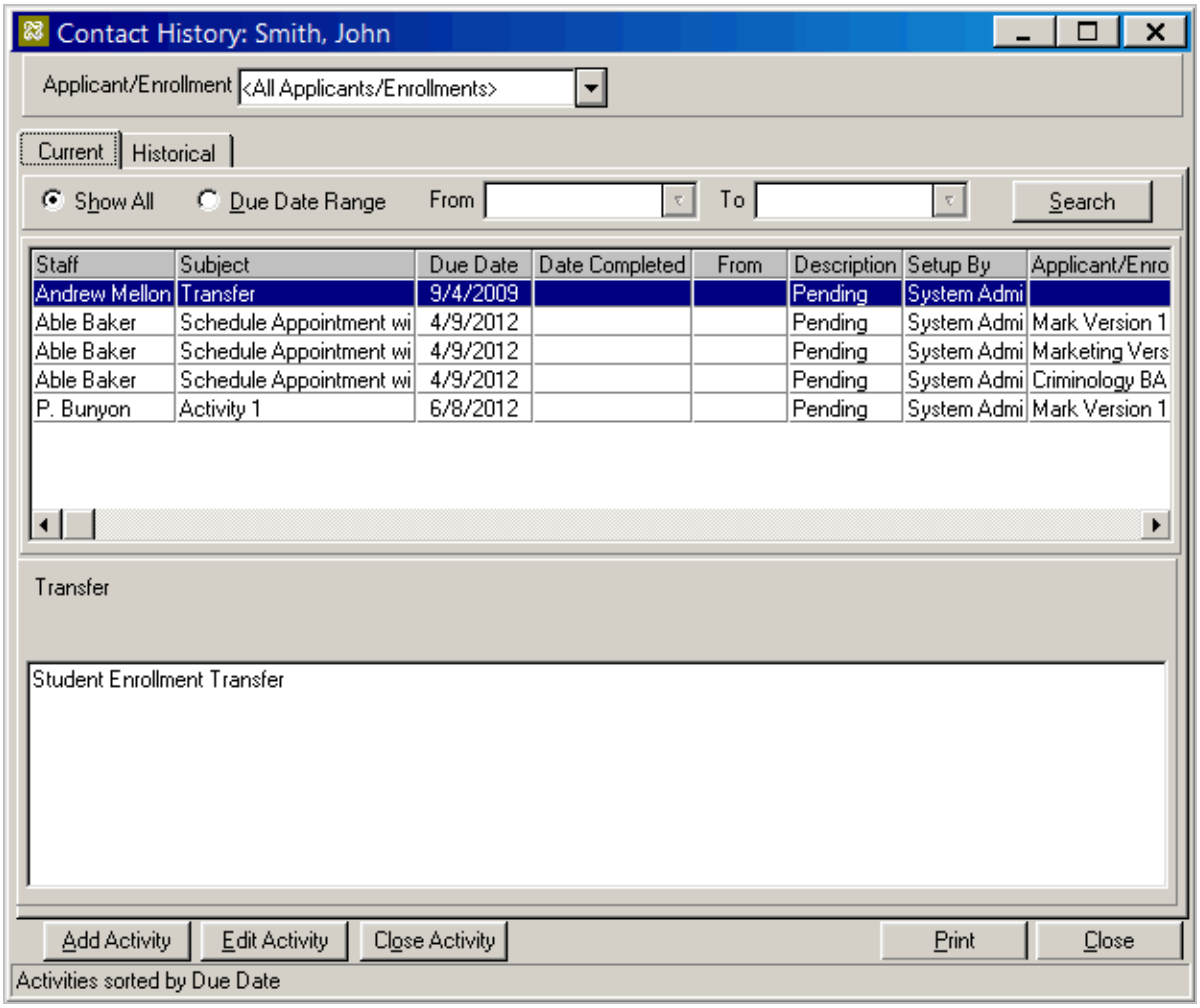
Note: To send an email message to a student from the person who is logged into CampusNexus Student, select the student and, if an email address is present in the Student Master form, click **E-Mail** at the bottom of the form. CampusNexus Student does not maintain a history of messages sent in this manner.

The following functionality applies to email activity types:

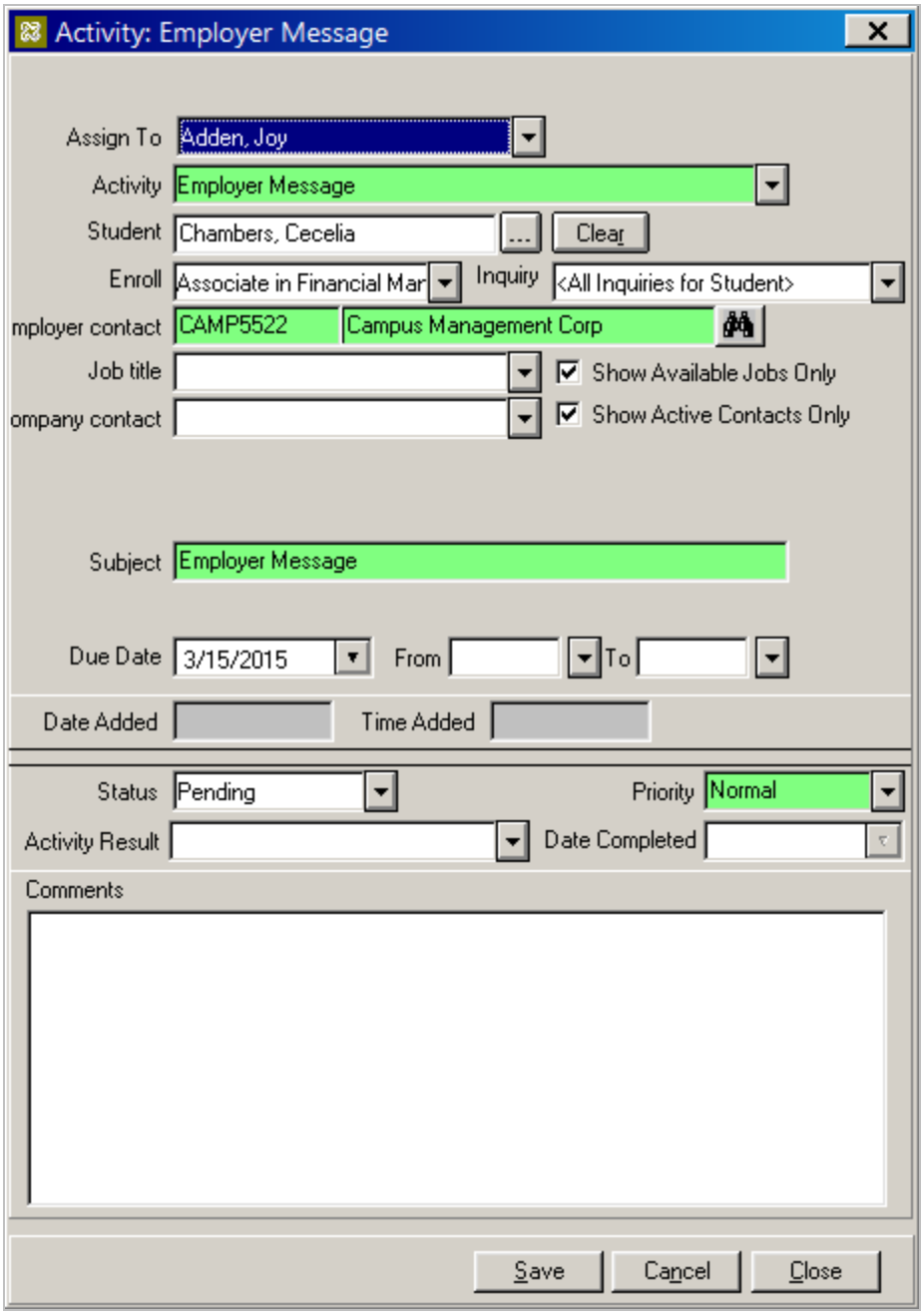
- When an "Email Student" activity is triggered in Contact Manager, CampusNexus Student inserts the campus location default values in the email based on the campus location associated with the student on the table in the activity.
- When an "Email Staff" or "Email Employer" activity is triggered in Contact Manager, CampusNexus Student inserts the system-defined default values in the email.
- When a manual "Email Student" activity is added to a student, the staff member's email address that is associated with the activity is used unless it has not been defined. In this case, CampusNexus Student records the campus location that the staff member is currently logged into as the From: email address.
- When a manual "Email Staff" or "Email Employer" activity is added, the staff member's email address that is associated with the activity is used unless it has not been defined. In this case, CampusNexus Student records the campus location that the staff member is currently logged into as the From: email address.
- When no default values are specified at the campus location level, the system-defined default values are used.

To add an email activity for a student (or employer):

1. Select the student or employer for whom the email is intended.
2. Navigate to **View > Contact Manager > Activities**. The Contact History form is displayed. Any previous activities for the selected student are displayed.



3. Click **Add Activity**. The Activity form is displayed.



4. In **Assign To** select the person who is responsible for this email.
5. Select the email **Activity** to be executed.
6. Check the **Student** field to be sure the correct student is displayed.
7. To send this email to a group, click ... next to the student field. The Search form is displayed.
8. Select the **Groups** tab and select the group that you want to send this email to.
9. Click **Load**. The members of the selected group are display in the bottom pane of the Search form.
10. Select the members in the group to send the email to. Click **Save**. A message is displayed allowing you to name

the group. Name the group and click **OK**. You are returned to the Activity form.

11. Select the correct **Enroll** status.
12. Select the correct Lead Date and Program in the **Inquiry** field.
13. Select **Show Available Jobs Only** and select a **Job**.
14. Select **Show Active Contacts Only** and select a **Contact**.
15. The **Subject** of the email defaults to the name of the activity, but you can change it.
16. Enter the **Due Date** for the email message to be sent.
17. The **From** and **To** times are not necessary for this type of activity, but you can enter them.
18. Select the **Status** for the email activity.
19. Select the **Priority** for the email activity.
20. Enter the text for the email in the bottom pane of the Activity form.
21. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Document Tracking by Student

This form lists documents to be tracked and viewed for the selected student. CampusNexus Student can be set up to automatically put documents on this list as certain events or milestones happen. For instance, you can set up a list of documents for a program version. When a student enrolls in the program version, the list of documents is automatically added to the student's document tracking list. You can add new documents to the student's list as well as edit or remove those that are already on the list. You can display documents that have been scanned.

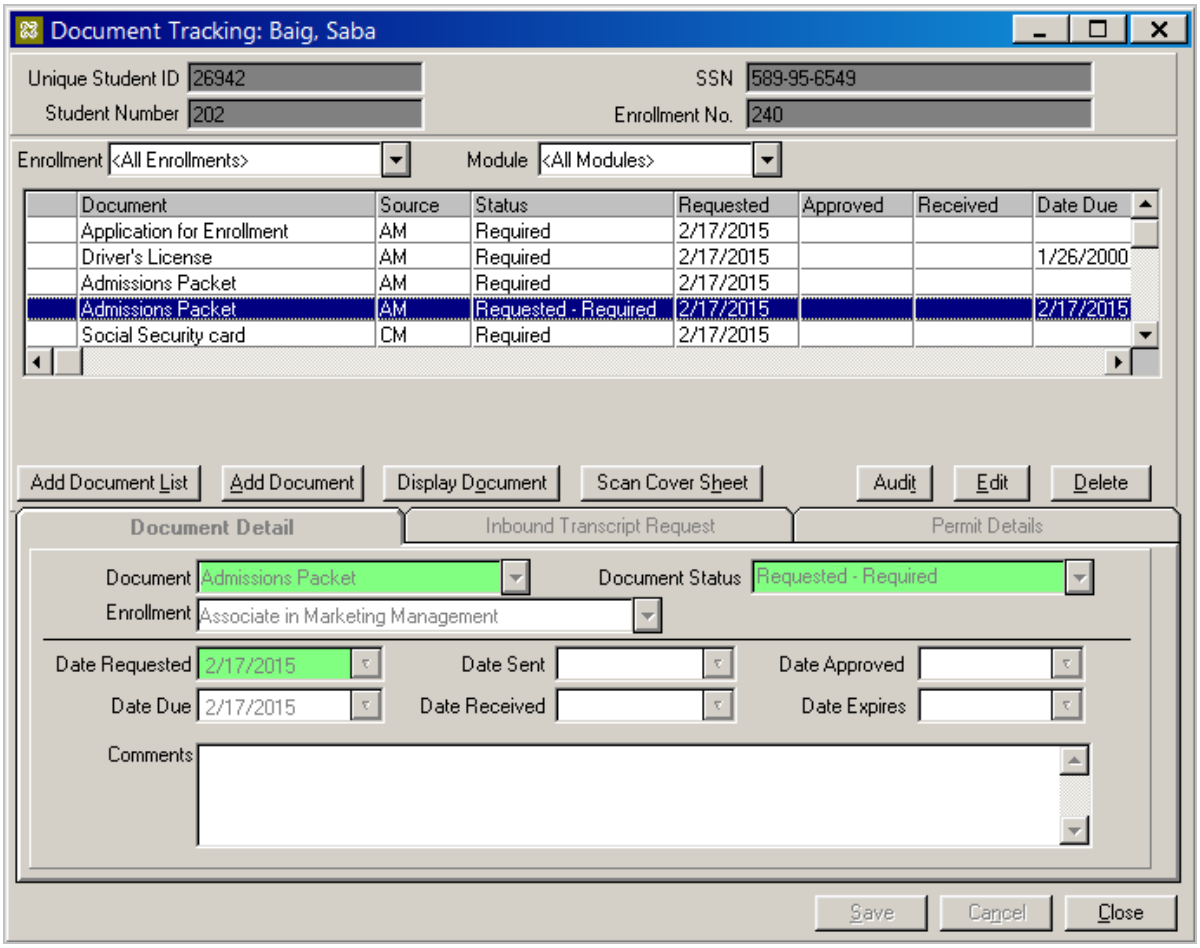
See the following procedures:

- Track Documents
- Add Document List
- Display Document
- Scan Cover Sheet
- Audit Document Changes

Note: This procedure is different from the procedures under Document Tracking on the Daily module menus. This procedure lists all the documents for a single selected student. The procedures on the Daily menu list all the students for a selected document.

To add or edit the tracking data for a document:

1. Select the student for whom documents are to be tracked.
2. Navigate to **View** > **Contact Manager** > **Documents**. The Document Tracking form is displayed. Any documents that have already been added to the student's list appear on the grid. An icon in the left column of the grid indicates that the document is viewable.



3. Select an **Enrollment**. The documents related to the selected enrollment/module combination are displayed on the grid. **All Enrollments** is the default selection.
4. Select a **Module**. The documents related to the selected enrollment/module combination are displayed in the grid.

   If the module selected is Financial Aid or Career Services, an additional drop-down list is displayed to the right of the Module field.

   - If the Financial Aid module is selected, the drop-down box is labeled **Award Year**.
   - If the Career Services module is selected, the drop-down box is labeled **Placement**.

   Note: If the default module was set to Financial Aid in the Session Parameters form, the Document Tracking form displays Financial Aid documents only.
5. If the **Award Year** or **Placement** drop-down box is visible, select an item from the list. The default selection displays all documents for the module. If an item, such as a specific award year or specific placement, is selected, only documents relating to that item may be added or displayed.
6. Click **Add Document List** to add a new list of documents to the tracking list. This action enables the Document Detail tab.

Note: If you are adding a new document, select it from the Document List drop-down list. Documents appear on this list when they are added under Lists > Contact Manager > Documents. Document Status codes appear on this list after they are added under Lists > Contact Manager > Document Status.

7. Enter the **Date Requested**, **Date Due**, **Date Sent**, **Date Received**, **Date Approved**, **Date Expires** data as it becomes available.

   The Date Sent field is automatically updated when a mail merge letter is printed that has the document included as an attachment.

   Date Expires is important for Title IV Credit Balance Waiver Documents. For a student to appear on the Title IV Credit Balance Report as having waived the Title IV refund of credit balances requirement, the Date Expires must be null or later than the date the report is run. The Title IV Credit Balance Waiver Document must be related to a specific enrollment, not to All Enrollments. See Setup > Campus Locations > Financial Aid tab for more information.

   For Registration Prerequisite Documents (Permits), the Date Expires relates to registration dates, not to course start dates. For example, an **Instructor Permission to Register** document might only be good for 7 days (expires on 6/29/10), which means the student would need to register before or on 6/29/10 to successfully register for the course. If the course start date is 8/1/10, the student could still register as long as the student did so before or on June 29th. After the expiration date, the permit document would no longer be considered approved and registration would fail regardless of the course start date.

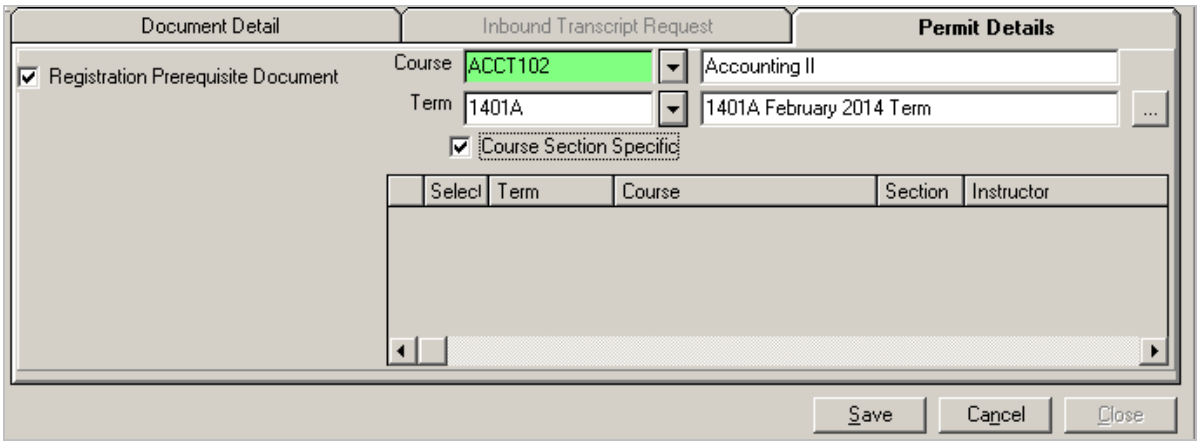
8. Selecting an Academic Records Document which was configured as a Registration Prerequisite Document enables the **Permits Details** tab.

   Permit Documents are not enrollment specific, therefore a permit document is visible under any and all enrollments. Permit Documents are Module Specific and appear as Academic Records documents.

9. To select a course and any other field, you must check the **Permit type**. Once the Permit type is selected, the course drop-down is enabled as a required field. The course drop-down is only be filtered by campus & active settings.

10. Click ... to select one term or multiple terms. The Term Selection form is displayed, showing the Term Code and Term Start Dates. Only active, registration terms that are not closed are available for selection.

11. Select **Course Section Specific** to view a listing all available course sections based on the course selected (and terms, if any term is selected). Course sections shared from other campuses are included in the list.



12. Use the **Comments (Document Detail tab)** to note which faculty/staff approved the permit.

13. Enter the expiration date of the permit. CampusNexus Student enforces it (Document Detail tab).
14. Select a course and a term without any sections specified, so that the permit is applicable to registration for the course in any of the specified terms, regardless of section.
15. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

To add or edit the tracking data for a document list:

1. Select the student for whom documents are to be tracked.
2. Navigate to **View** > **Contact Manager** > **Documents**. The Document Tracking form is displayed. Any documents that have already been added to the student's list appear on the grid.
3. Select an **Enrollment**. The documents related to the selected enrollment/module combination are displayed on the grid.
4. Select a **Module**. The documents related to the selected enrollment/module combination are displayed on the grid.
5. Click **Add Document List** to add a new list of documents to the tracking list. This action enables the **Document Detail** tab. Select a **Document List** from the drop-down list.

   Note: Document lists appear on this list when they are added from Lists > Contact Manager > Document Lists.
6. Select a **Document Status.** If a document has a default status (e.g., On File), and you select a different status when uploading the document list (e.g., Required), the document will retain its default status (On File, in this case).

   If a document does not have a default status, the status you select when uploading the document list is assigned to the document (Required, in this example).

   Note: Document Status codes appear on this list after they are added from Lists > Contact Manager > Document Status.
7. Enter the **Date Requested**, **Date Due**, **Date Sent**, **Date Received**, **Date Approved,** and **Date Expires** as needed. The same dates are assigned to all documents on the document list.
8. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Display Document

This function works both with and without ImageNow. If your institution has the necessary technology to scan or otherwise import images of student documents, you can load or scan them into the CampusNexus Student database. The document can be in any file format that can be processed by an application on your PC.

Note: The coding used to display a document when the Display Document button is selected:

```
Set objImageNow = GetObject(, "imagenow.CtrlPanel")
Call objImageNow.INViewDocDID(ImageNowDocID0, ImageNowDocID1)
For version 6.0, the coding to display the document image must be changed to:
Set objImageNow = GetObject(, "imagenow6.CtrlPanel")
Call objImageNow.INViewDocDID(ImageNowDocID, -1, 0, 1)
```

The existing code to launch the ImageNow log on form if the Display Document button is selected but the user is not logged into ImageNow is:

```
lngReturn = ShellExecute(0, "", "imagenow32.exe", "", Replace(ImageNowPath, "\imagenow32.exe", ""), 1)
```

For version 6.0, the coding to call the ImageNow log in form if the user is not logged into ImageNow must be changed to:

```
lngReturn = ShellExecute(0, "", "imagenow.exe", "", Replace(ImageNowPath, "\imagenow.exe", ""), 1)
```

To view a stored document:

1. Select a document on the grid and click **Display Document**. If no attachment has been stored for this document, the dialog form displays *No attachment found for this document*. Otherwise the dialog displays the name of the document.
2. If the document is available in a file but has not yet been imported into CampusNexus Student, click **Upload Document** to open a file browser from which you can pick the file for import. Select any type of file that can be viewed by the software on your computer.

   Once the file has been imported, it is no longer necessary (as far as CampusNexus Student is concerned) to retain the original image file. After the image is imported, it is available for direct viewing. To view a file attached as a document, you must have the necessary software on your PC to open the file format in which the document is stored. Example file formats include .doc (Word), .xls (Excel), .vsd (Visio), and .txt (Notepad).
3. If you have a scanner attached to your computer and you have "Twain-compliant" scanning software, click **Scan** to import an image of the document from the scanner application. The Document Display form appears.
4. Click **Scan** Document on the Document Display form to activate your scanning application. The many available scanning applications preclude a detailed description of that process here. For example, however, using HP PrecisionScan Pro, once the document is scanned, you would click the **File** > **Place Image** to send the scanned image back to the Document Display form.

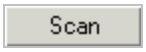
   On the Document Display form, you can:

   - Click **Load** to load a bitmap image file (*filename*.bmp) of the document. The bitmap file format is the only one you can load from this command.
   - Click **Clear** to clear the previously imported document image.
   - Click **Print** to print the document image.
   - Click **Rotate** to rotate the document image 90 degrees.
   - Click **Flip** to rotate the document image 180 degrees.
   - Click **Close** to close the form.
5. In the Document Display dialog box, the other controls are:

   View a document that is on file. When you view a document, it is opened by the application that is designated in Windows to open that type of file. For instance, a file named Resume.doc is opened by Microsoft Word.

   Clear the document from CampusNexus Student storage.

   Return to the previous form.

   Scan a document as described earlier in this topic.

   Close this form and return to the Document Tracking Form.

If a button shows in only black and gray tones, the function it represents is not available until something else happens. For example, you cannot view a document until it has been scanned in or loaded or, has been loaded. You cannot load another document unless the previous one is cleared.

To scan a cover sheet

If the document selected is linked with ImageNow, click the **Scan Cover Sheet** button to print a cover sheet to be printed. This sheet contains bar codes for student and enrollment. The scan cover sheet is used to identify a student whose documents are being scanned with a scanner. For detailed information about ImageNow, see your system administrator.

To audit a document:

The Audit function tracks changes to the document and its status history. This enables institutions to study the time it takes for each document to progress from the Requested or Required status to the On File status. Metrics can subsequently be developed with the goal of streamlining the process.

1. Select a document in the grid and click **Audit.** A verification message is displayed.
2. Click **Yes** to see a history of all edits and changes made to all documents in the grid or click **No**to see the history of only the selected document. If a blank form is displayed, it indicates that there are no transactions on file for the document(s). Click **Close** to close the form. You are returned to the Document Tracking form.

Addresses in Contact Manager

Your institution determines which addresses to track and how they should be labeled. CampusNexus Student can accommodate many student addresses. Address Types (labels) are maintained in the Lists > Admissions menu.

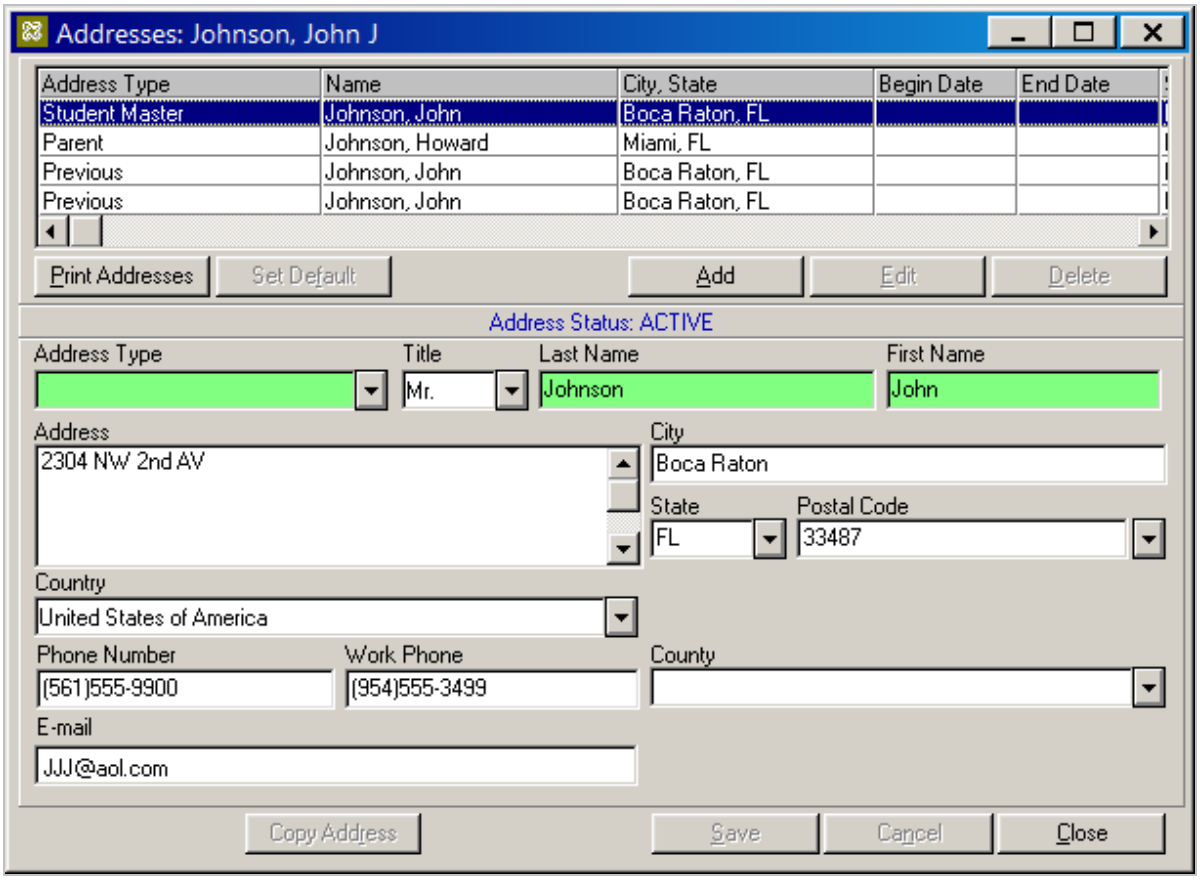
When you change a student's address on the Student Master form, you are prompted to save the previous address. (We recommend that you set up an address type for Previous Address.)

Note: The addresses listed and maintained on this form are in addition to the student's current local address which is on the Student Master form.

For information regarding FERPA Address Types and Academic Information related to FERPA, please refer to FERPA Student Information and Academic Record Information.

To add or edit an additional student address:

1. Navigate to **View** > **Contact Manager** > **Addresses**. The Addresses form is displayed. Any previously added addresses are listed in the grid.

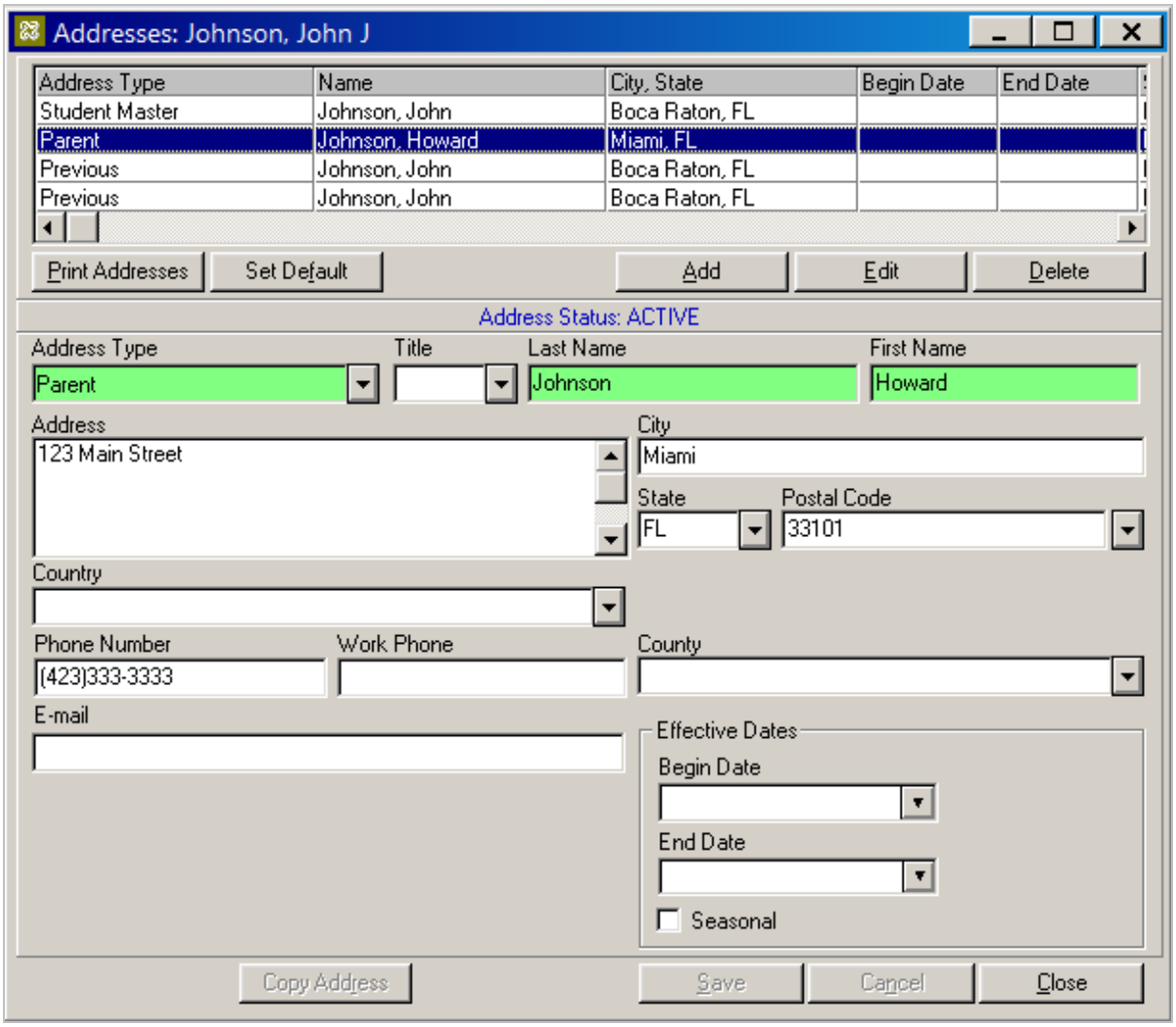


2. Click **Add**, or select a record and click **Edit**. Click **Delete** to remove an address.
2. Click **Copy Address** on this form if you want CampusNexus Student to populate the student's address into the address fields.
3. If you did not click the **Copy Address** button, then:

- Select an address type from the **Address Type** list. See Address Types for configuring address types. If 'Billing Address' address type is selected, it is displayed in the student's ledger card in the Billing Address tab.
- Select a salutation from the **Title** list. These values are usually Dr., Madame, Miss, Mr., Mrs., Ms., Sir, and so on. See Titles to configure Titles.
- Enter the new address into the address fields.
- If you enter the ZIP code first, CampusNexus Student fills in the city and state. If you enter a state code, you can search the ZIP code list to view all the codes and cities in the state.
- Enter a phone number, work phone number, and e-mail address.

4. Click **Save**.
5. Click **Print Addresses** to print a list of the student's addresses.
6. Click **Set Default** to select an address and post it to the Student Master form. CampusNexus Student fills in the address fields. When you have chosen an address as a default address, the button is replaced with a

button. Click this button to remove the address as the default address.
7. If the Use Effective Dates flag is enabled, the Effective Dates section of the form is displayed.



8. Select the **Begin and End Effective Dates** that the student would like the address to be in effect. Enter these dates only if the address type is seasonal or temporary.
9. Select **Seasonal** if the address is seasonal or temporary. A "Y" will be placed in the Seasonal column in the address grid. If you clear the **Seasonal** check box, an "N" will be placed in the Seasonal column.
10. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

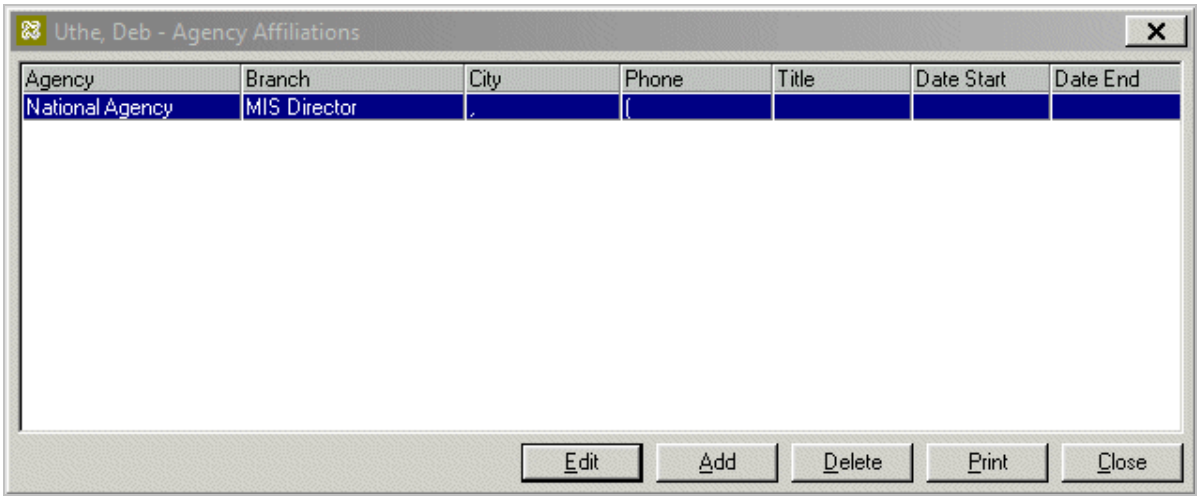
Agency Affiliations

A student can be related to multiple agencies. Agencies to which the student is related are listed on the Agency Affiliations form. Agencies are set up under Daily > Contact Manager > Agency-Third Party.

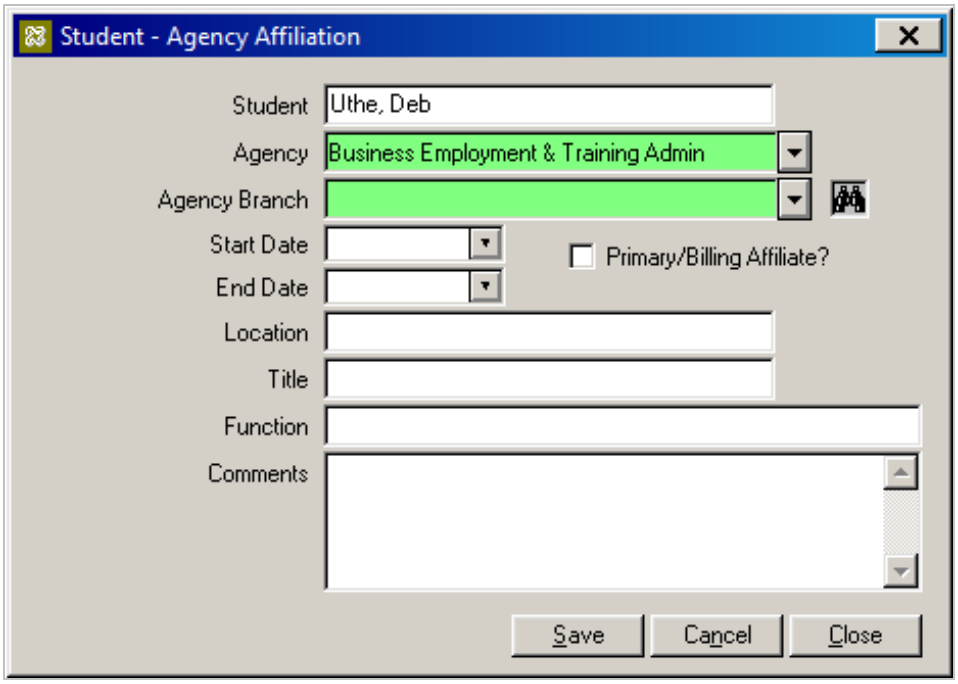
Note: The Agency selection on the student's master form designates one of possibly many agencies. The Agency shown on the student master may have several branches. To complete the connection between the student and the agency, select and add an Agency Branch under Agency Affiliations.

To view, add, or edit agency affiliations:

1. Select a student.
2. Navigate to **View > Contact Manager > Agency Affiliations**. The Agency Affiliations form is displayed.

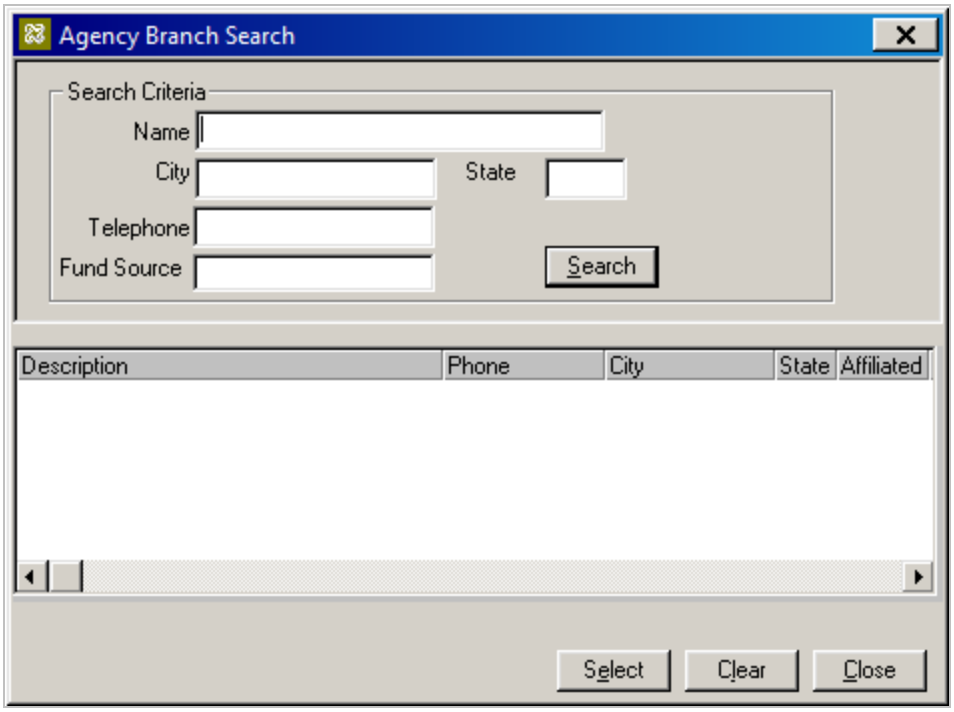


3. Click **Add**, or select a record and click **Edit**. The Student Agency Affiliation form is displayed. The detail form provides details of the student's relationship to the agency.



4. Select the **Agency** with which the student is affiliated.
5. Select the **Agency Branch** with which the student is affiliated.

   If you do not see the Agency Branch, click to view the **Agency Branch Search** form, in which you can search by additional criteria.



6. Enter the **Start Date** - the date that the student was first affiliated with the agency.

7. Enter the **End Date** – the date that the student was or will be last affiliated with the agency.
8. Select **Primary Billing Affiliate** if the student has more than one agency affiliation and this agency is to be the Primary Billing Affiliate. When Primary Billing Affiliate is selected, the billing method associated with this agency will be the default in the Enrollment Wizard.
9. Enter the **Location** – the location of the affiliation.
10. Enter the student's **Title** at the agency.
11. Enter the **Function** – the student's responsibility or role at the agency.
12. Enter any comments in the **Comment** field.
13. Click **Save**.
14. Click **Print** to see a report listing the student's agency affiliations.

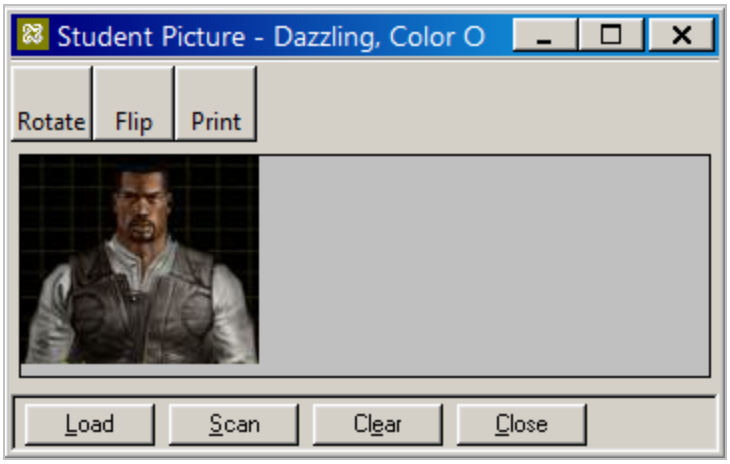
Student Picture

You can import digital images of your students into CampusNexus Student and display them when needed. When they are imported, the pictures are stored as bitmaps in a CampusNexus Student database.

Note: The Student Picture form is also accessible from the Student Master form.

To work with student pictures:

1. Select a student.
2. Navigate to **View > Student Bar > Contact Manager > Student Picture**. The Student Picture form is displayed. If a picture has already been imported for the student, it is displayed on the form.



3. Click **Load** to import a picture from a file. When you click Load, CampusNexus Student opens a directory search form. Use it to find the image you want to import.
4. Click **Scan** to open your scanner software and import an image from a scanner attached to your computer or on your network. When you click Scan, CampusNexus Student looks for Twain compliant applications on your computer. If there is more than one, select one to open. When the image is scanned, choose an option in the scanner application to export it to CampusNexus Student.

   Note: We recommend that you edit, crop, or size the image before you import it. Once it is imported, you cannot change anything except its orientation on the Student Picture form.
5. Click **Clear** to clear an existing picture of the student from the form and from the database.
6. Click **Close** to close the Student Picture form and save any changes you have made.
7. Click **Rotate** to rotate the image by 90 degrees.
8. Click **Flip** to turn the picture upside-down.
9. Click **Print** to print a copy of the student's picture. The picture is enlarged to just fit on an 8.5" x 11" sheet of paper.

Transcript Request

The Transcript Request form lists all transcript request records for the student. You can enter several requests for transcripts and then navigate to Daily > Contact Manager > Process Transcript Requests to print them all at once, along with the matching envelopes and labels.

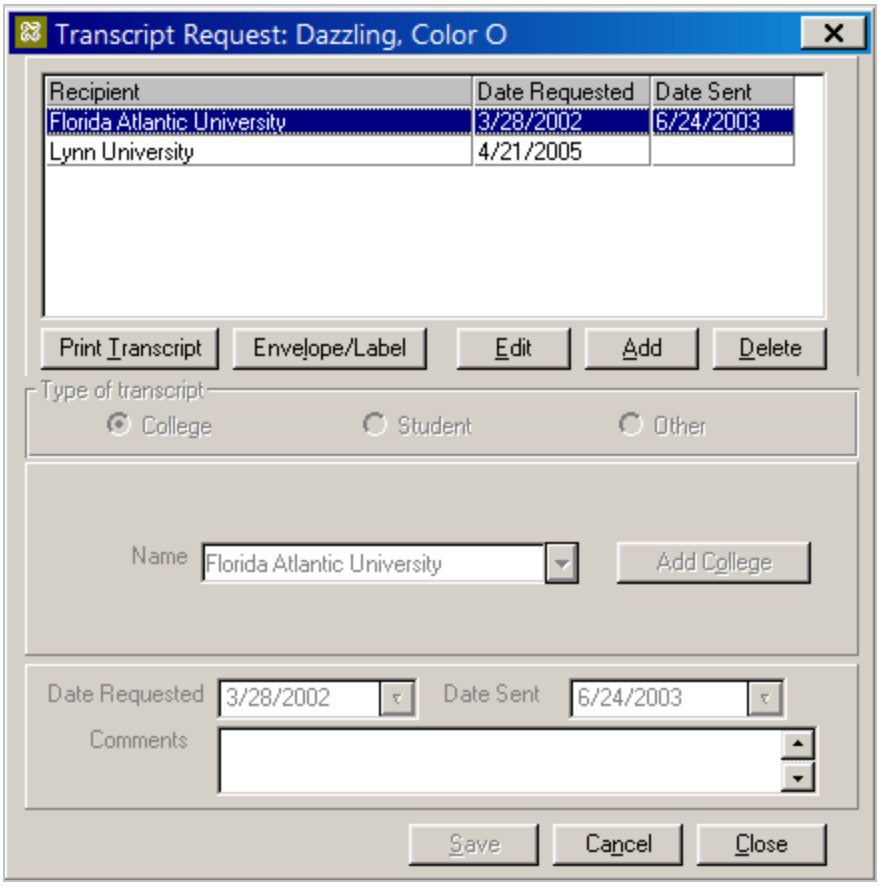
CampusNexus Student stores student transcript requests individually by capturing the college to which it was sent, the date requested, and the date sent. The college names are maintained in the College list (Lists > Admissions > Colleges) to prevent duplicate entry from schools from which courses may be transferred or to which transcripts may be sent.

If you created a custom transcript and entered the file name under Setup > Academic Records, CampusNexus Student uses your report instead of the generic report.

Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

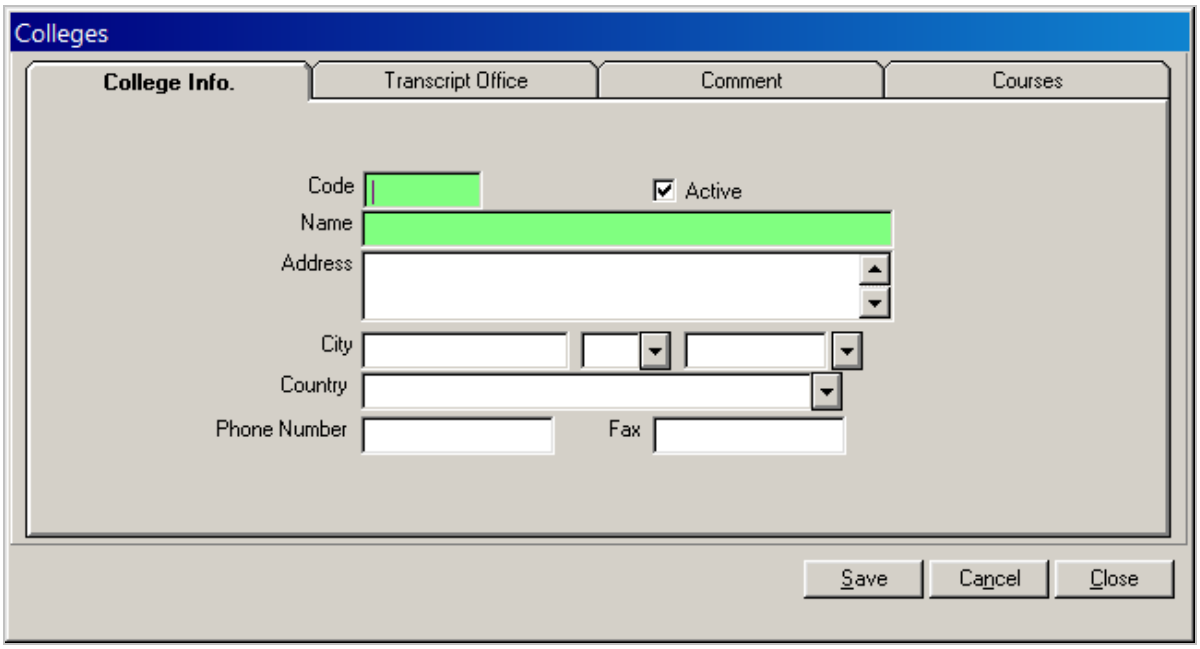
To add or edit a transcript request:

1. Select a student.
2. Navigate to **View > Contact Manager > Transcript Request**. The Transcript Request form for the selected student is displayed.

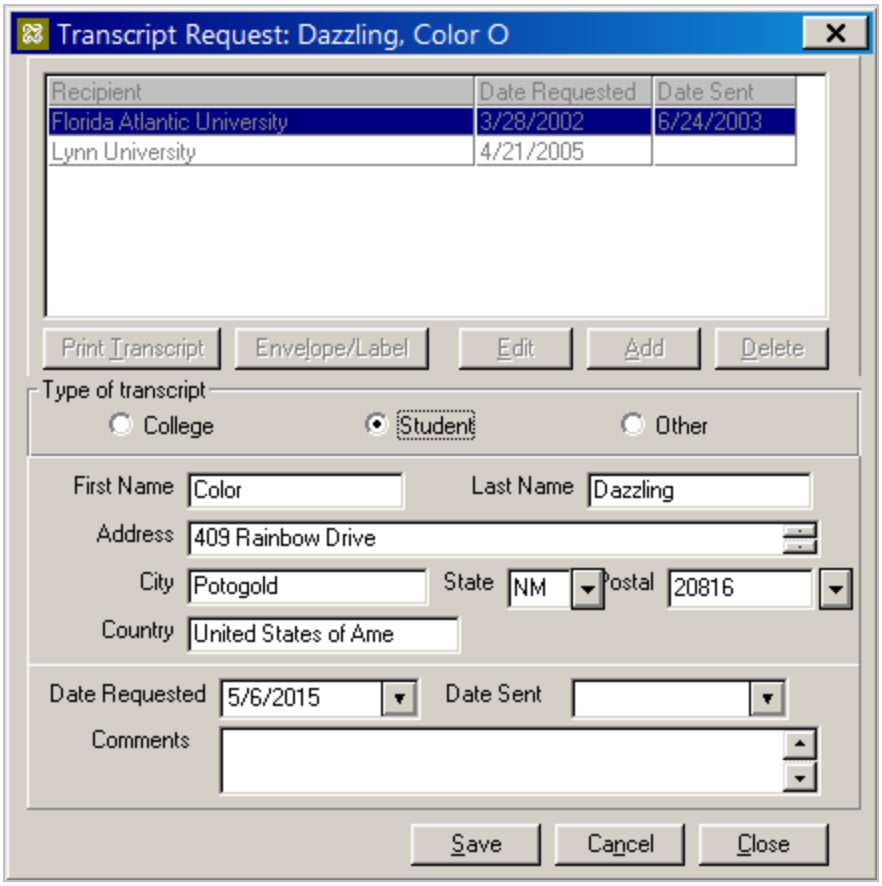


3. Click **Add**, or select a record and click **Edit**. The Add and Edit buttons enable the fields on the bottom of the form.
4. Select a **Transcript Type**. The options are College, Student, or Other.

a. If you choose **College**, select a college from the **Name** list or click **Add College**. When you click Add College, the Colleges form is displayed. (This option is only available if you have security rights to this list setup). Specify the necessary college information in the Colleges form, save and close the form, and select the college in the Name field on the Transcript Request form.



b. If you choose **Student**, the form displays the student's mailing address. You can change the address data as necessary.



c. If you choose **Other**, the form allows you to enter the recipient's name and address.

5. Enter the **Date Requested**. The default date is the system date when the Add button is selected.
6. If you choose to print the transcript at the time you enter the request, enter the **Date Sent** (no default). If you can leave this field blank, CampusNexus Student enters the date sent when you batch-process transcript requests under Daily > Contact Manager > Process Transcript Requests.
7. Enter any comments in the **Comment** field.
8. Click **Save**.
9. Select one of the transcript request records in the grid to print a transcript. Click **Print Transcript**. CampusNexus Student verifies that the student is not currently on "Transcript Hold".
    - If the student is not on hold, CampusNexus Student prints the student's transcript. When the report form closes, the form remains active and the Date Sent is updated with the system date. You can then click the Envelope/Label button.
    - If the student is on hold and you have authorization to override transcript holds, the following message is displayed: *"Override Transcript Hold for this student?"* Click **Yes** to produce the transcript.
    - If the student is on hold and you do not have authorization to override transcript holds, the following message is displayed *"Transcript Printing is on hold for this student."*
10. Click **Envelope/Label**. The Process Transcript Request form is displayed from which you can print an envelope

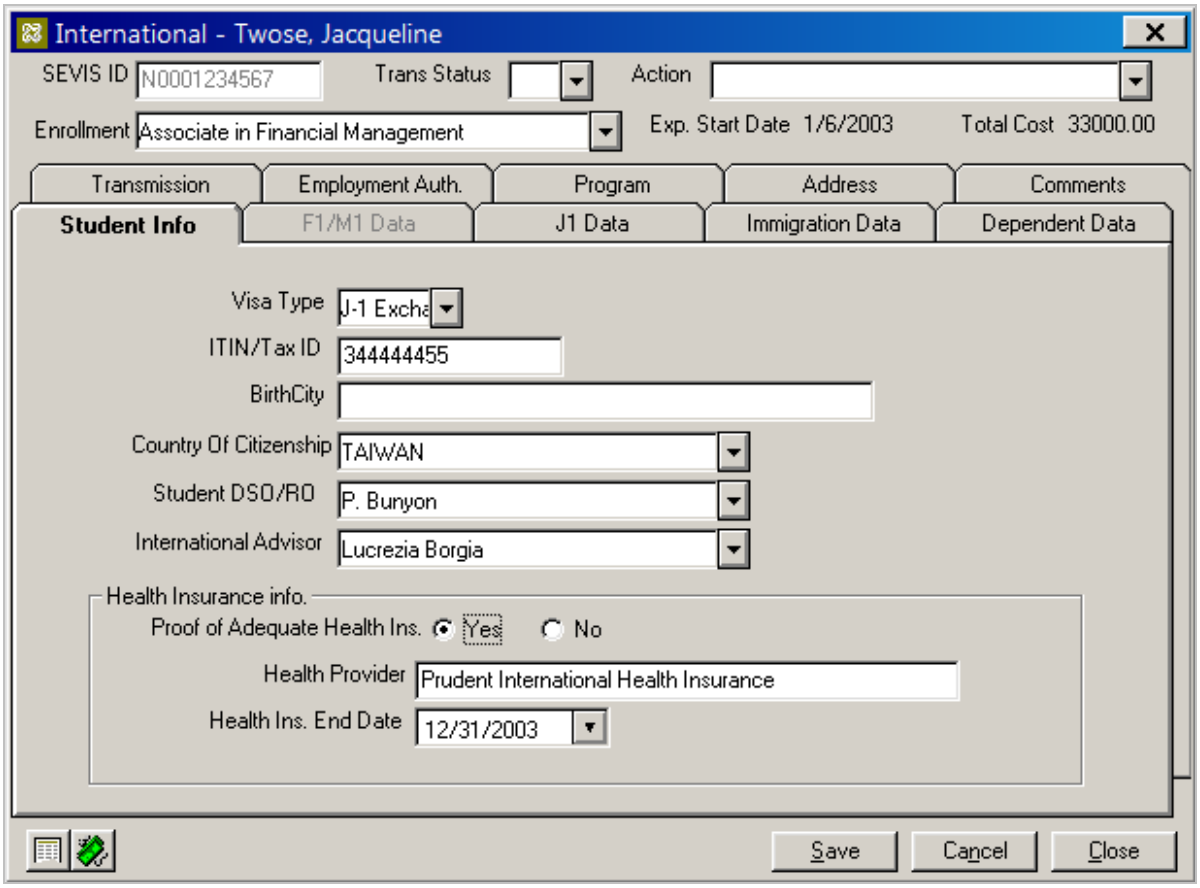
and/or a label. The labels are printed on the default label printer. You can select the envelope printer from a drop-down list of printers available to you.

11. After printing the transcript, envelope, and/or label, click **Save** to update the records in the Transcript Request table. The Save button does not close the form.
12. You can also add the transcript request without printing the transcript or envelope/label. This creates a record in the Transcript Request table with an empty Date Sent. The accumulated requests for transcripts can be processed later using Daily > Contact Manager > Process Transcript Requests.

International

This menu option is only available when the selected student is designated as an international student on the Student Master form. To make it convenient for you to monitor your international student data, this multipurpose form contains most of the information necessary to track and report on international (nonimmigrant) students and exchange visitors.

Click a tab in the image below to go to the Help topic that describes it.



The following fields are common to all tabs of the International form.

Fields Descriptions

Field	Description
SEVIS ID	An eleven-character identifier assigned to the student by INS. Refer to SEVIS Overview for general information about the Student and Exchange Visitor Information System (SEVIS) system.
Trans Status	Select **R** (ready) or **D** (DSO review).
Action	Select an Action if a student has no pending actions and the student has been previously transmitted to SEVIS and the status is accepted.
Enrollment	Select the enrollment for which the student is being reported to SEVIS.

Field	Description
Expected Start Date	CampusNexus Student displays the Expected Start Date from the enrollment record.
Total Cost	CampusNexus Student displays Total Dependent Expenses + Insurance Cost + Cost of Attendance (COA). • Total Dependent Expenses – Entered on the Dependent Data tab. • Insurance Cost – Entered on the Student Info tab. • Cost of Attendance (COA) – Entered on the Program tab.
The following buttons are displayed on the bottom of the International form:	
	Leads to the student's Enrollment form.
	Leads to the Financial Aid Summary.
Access to these forms is controlled according to your access permissions via the normal menu options.	

SEVIS Overview

Student and Exchange Visitor Information System (SEVIS)

CampusNexus Student provides the tools to capture data pertinent to a nonimmigrant (NI) student or exchange visitor. You can record data related to their pre-arrival activities, physical arrival, status while in the U.S., changes in status, and physical departure.

You can communicate these details and events to the U.S. Immigration and Naturalization Service (INS) in XML-formatted batch transmissions via the Internet. CampusNexus Student complies with the Student and Exchange Visitor Information System (SEVIS) requirements.

Note: For additional information on SEVIS and transaction batch processing, refer to the U.S. Immigration and Customs Enforcement website.

When a nonimmigrant prospective student contacts an institution, the student can be processed through the normal lead and enrollment actions by the Admissions staff; however, when prospective students contact an institution using the CampusNexus Student Web Interface, they should be identified as soon as possible as a nonimmigrant, or "international" students. The campus may or may not want to process these students separately from domestic and/or other non-international students. If the campus does not host international students, it is obligated to immediately inform the prospective students.

After the student has been offered admission (enrolled) and before the student travels or reports to the institution, additional information must be collected. This information is processed through SEVIS. SEVIS, via the institution, provides the students with the proper documentation allowing them to apply for the appropriate student visa or to transfer programs from their current nonimmigrant status within the US.

Only Designated School Officials (DSOs) or Responsible Officers (ROs) can transmit and retrieve information from SEVIS, dictating a close working relationship between the DSO/RO, the International Student Advisor (if different), and all divisions and departments within the institution. The International Student Advisor/DSO/RO will need to maintain timely and accurate information about the student and report required data to INS/DOS as specified by the law. The International Student Advisor/DSO/RO may or may not have responsibilities associated with the admissions process.

The DSO/RO will use CampusNexus Student to identify a student or exchange visitor that needs to be documented by batch transmissions in SEVIS. The DSO/RO will report, by batch transmission, updates and changes associated with a student or exchange visitor within 24 hours of entering the data in CampusNexus Student. The DSO/RO will use CampusNexus Student to request and process batch downloads from SEVIS. The DSO/RO will evaluate error reports and generate printed documents for approved records.

International administrative support and International Student Advisors can, with the proper user authorizations, perform data entry on the International form. The ability to mark a record as "Ready To Send" will be limited to a staff person with DSO/RO approval authority.

CampusNexus Student stores and tracks the data necessary to transmit nonimmigrant (visa types F1, M1, and J1) student data through SEVIS. You can manually extract files to report to SEVIS, and import acknowledgement files from SEVIS. You have the option of processing other nonimmigrant types, but only those defined as F1, M1 and J1 are processed through SEVIS. You can manage written documentation and contact information for international students using existing the Contact Manager and Document Tracking features in CampusNexus Student.

The International form under View > Contact Manager provides a centralized location for tracking data, activities, and documents related to international students.

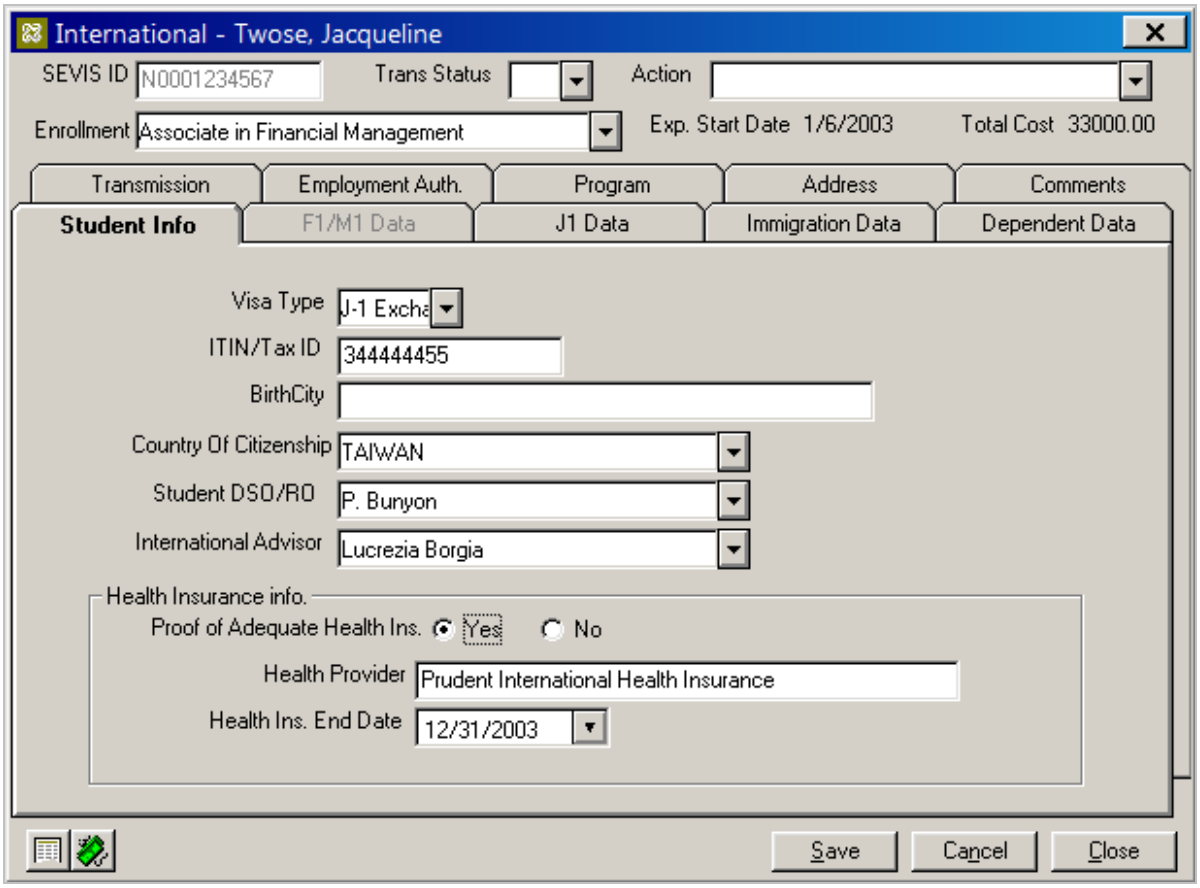
Student Info

The Student Info tab on the International form contains basic information about the nonimmigrant (NI) student or exchange visitor.

To record international student information:

1. Select an international (NI - nonimmigrant) student.
2. Navigate to **View > Contact Manager > International**. The International form is displayed.

   Note: This option does not appear on your menu unless you have selected an NI student.



3. Select the **Student Info** tab. Specify appropriate options.

Field Descriptions

Field	Description
Visa Type	Select a Visa Type. See Lists > Contact Manager > Visas.
ITIN/Tax ID	Enter the 9-character identifier issued to the student by the IRS.
Birth City	Enter the student's city of birth.
Country Of Citizenship	Select the country of which the nonimmigrant student or exchange visitor is a citizen.
Student DSO/RO	Select the Designated School Official (DSO) or Responsible Officer (RO) from staff members defined as DSO/ROs. The DSO/RO is identified on the International tab of the Campus Information form.
International Advisor	Select the student's international advisor from staff members in the International Advisors group.
Proof of Adequate Health Ins.	Did the student submit proof or adequate health insurance to your institution ? Select Yes or No. Required only for a student with a J1 visa.
Health Provider	Name of the student's health insurance provider.
Health Ins. End Date	End date for the student's health insurance coverage.

4. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

F1/M1 Data

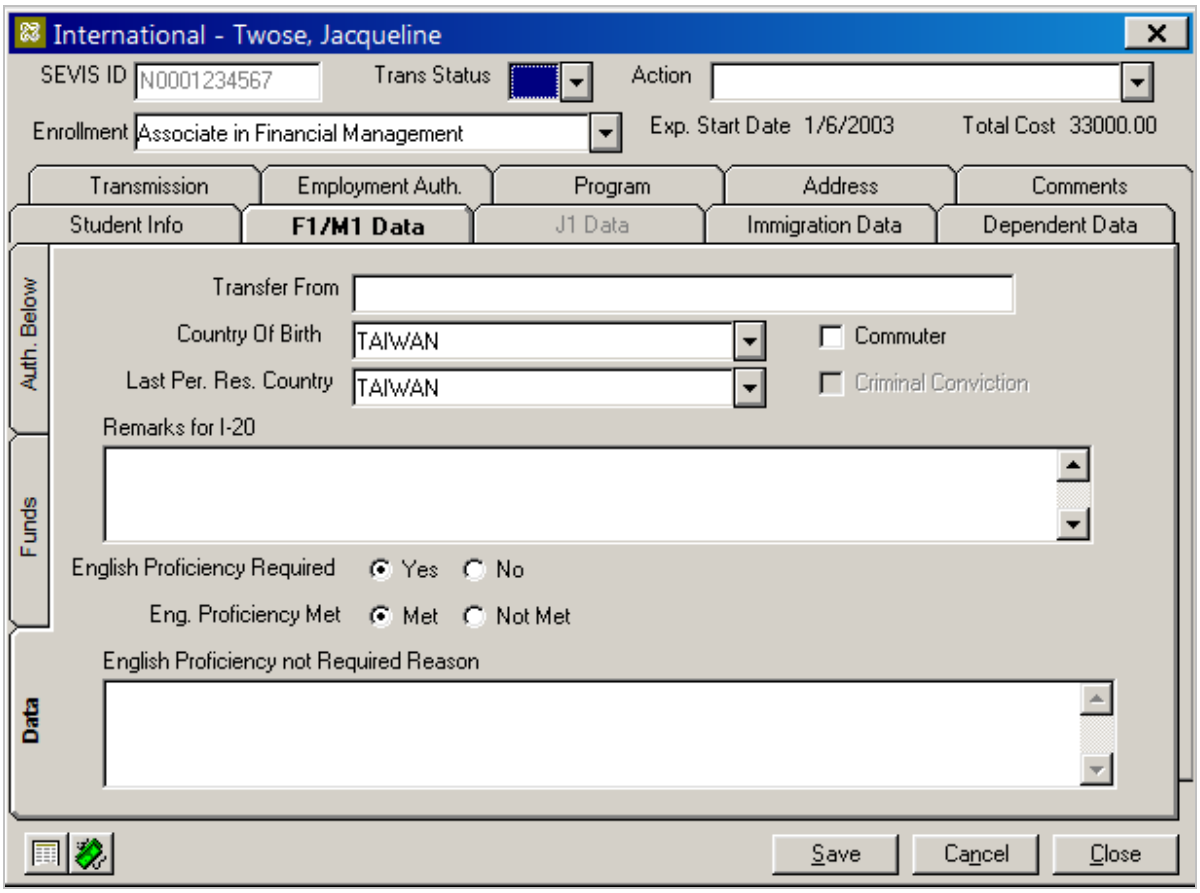
The F1/M1 Data tab on the International form is enabled for the F-1 (Academic), M-1 (Vocational), and Other visa types only. This includes the nonimmigrant students for SEVIS and other international students tracked by your institution .

To record the international student's F1/M1 data:

1. Select an international (NI - nonimmigrant) student.
2. Navigate to **View > Contact Manager > International**. The International form is displayed.

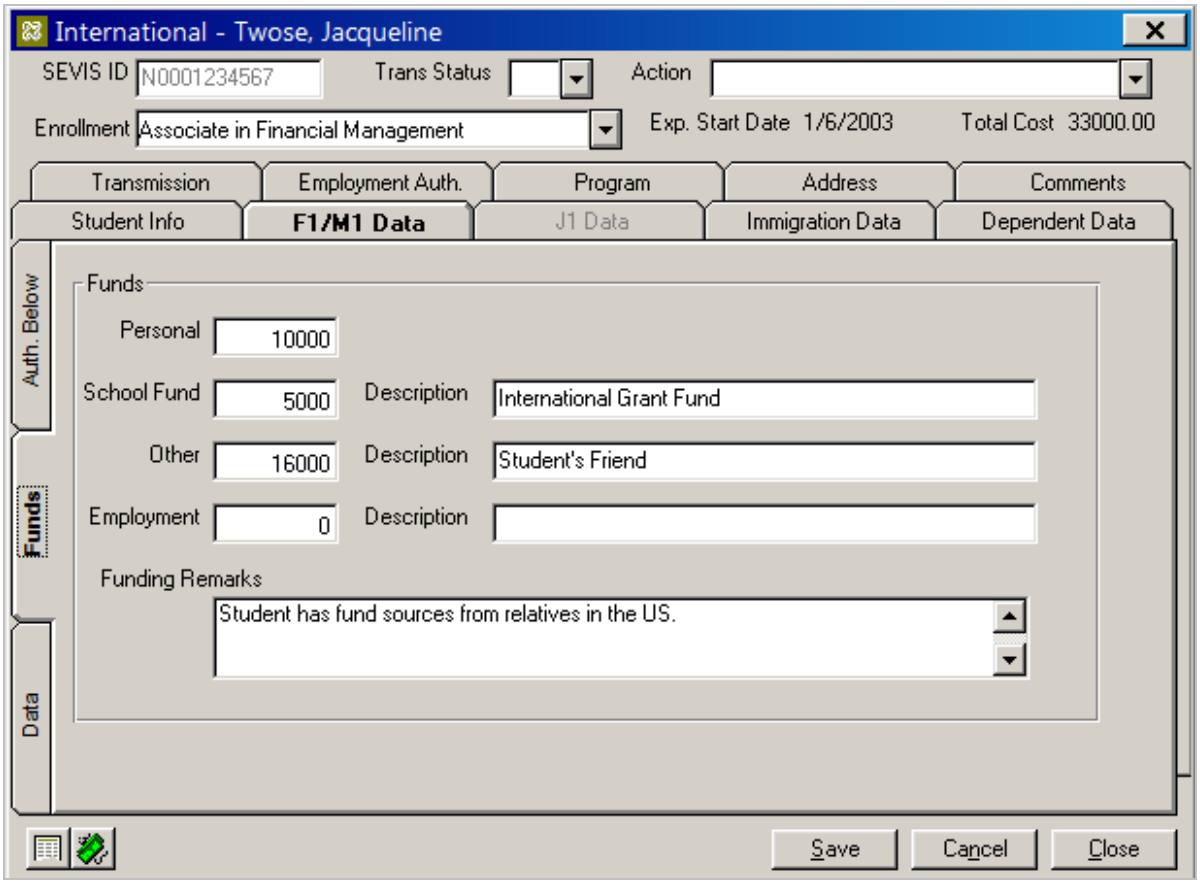
   Note: This option does not appear on your menu unless you have selected an NI student.
3. Select the **F1/M1 Data** tab. The F1/M1 Data tab has three subtabs on the left side: Data, Funds, and Auth. Below.
4. Select the **Data** subtab and enter appropriate data in the following fields:

   - Transfer From
   - Country of Birth
   - Commuter
   - Last Permanent Resident Country
   - Criminal Conviction
   - Remarks for I-20
   - English Proficiency Required
   - English Proficiency Met
   - English Proficiency Not Required Reason



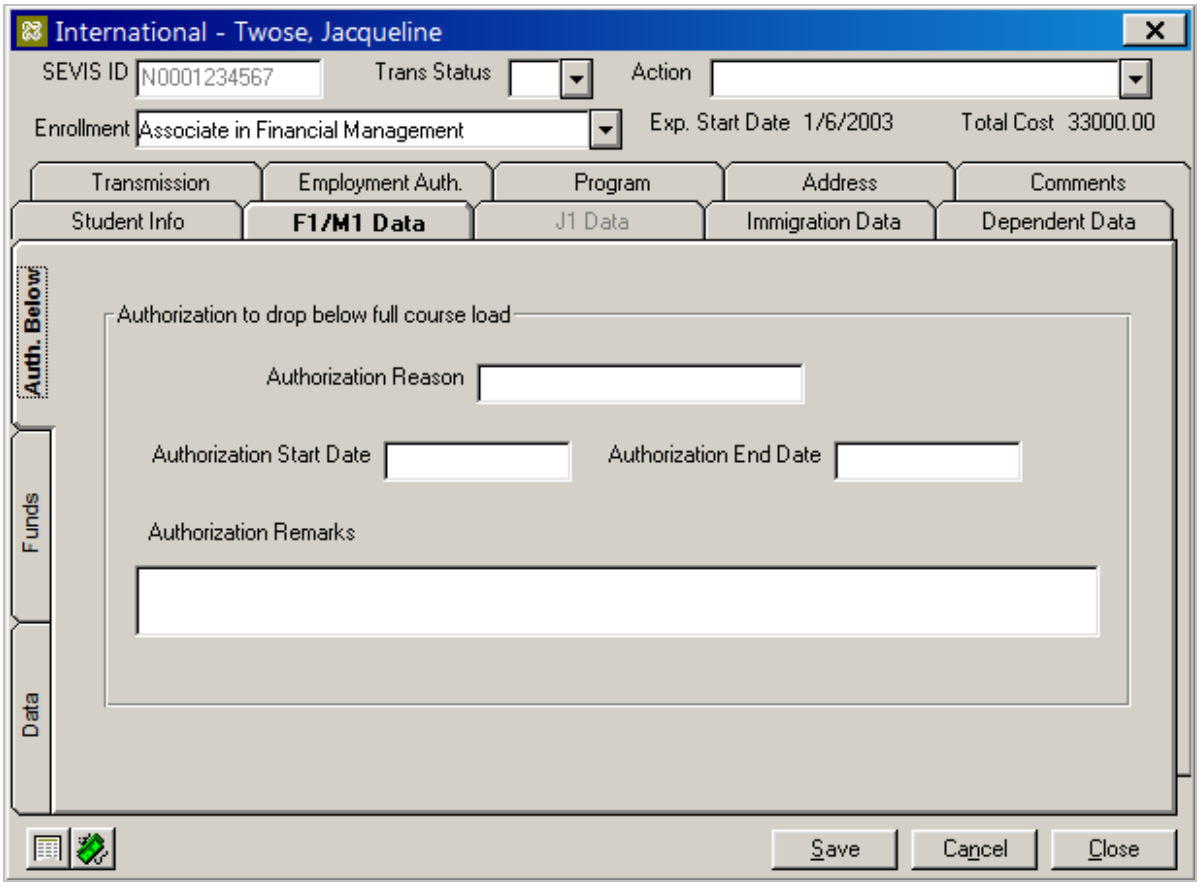
5. Select the **Funds** subtab and enter appropriate data in the following fields:

   - Personal Funds
   - School Funds
   - Description of School Funds
   - Other Funds
   - Description of Other Funds
   - Employment Funds
   - Description of Employment Funds
   - Funding Remarks



6. Select the **Auth. Below** subtab and enter appropriate data in the following fields:

   - Authorization Reason
   - Authorization Start Date
   - Authorization End Date
   - Authorization Remarks



7. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

J1 Data

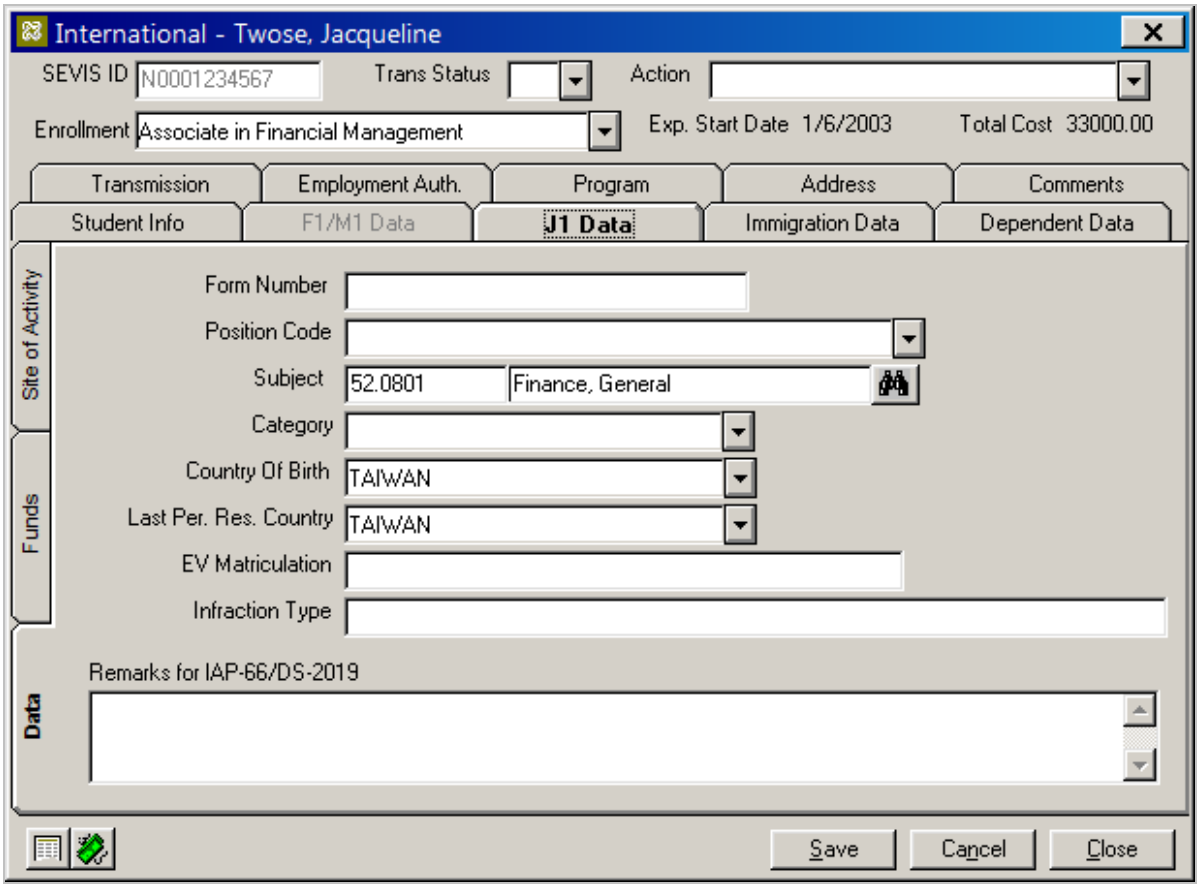
The J1 Data tab on the International form is enabled for the NI visa types J1 and Other only. This includes the nonimmigrant students for SEVIS and other international students tracked by your institution.

To record the international student's J1 data:

1. Select an international (NI - nonimmigrant) student.
2. Navigate to **View > Contact Manager > International**. The International form is displayed.

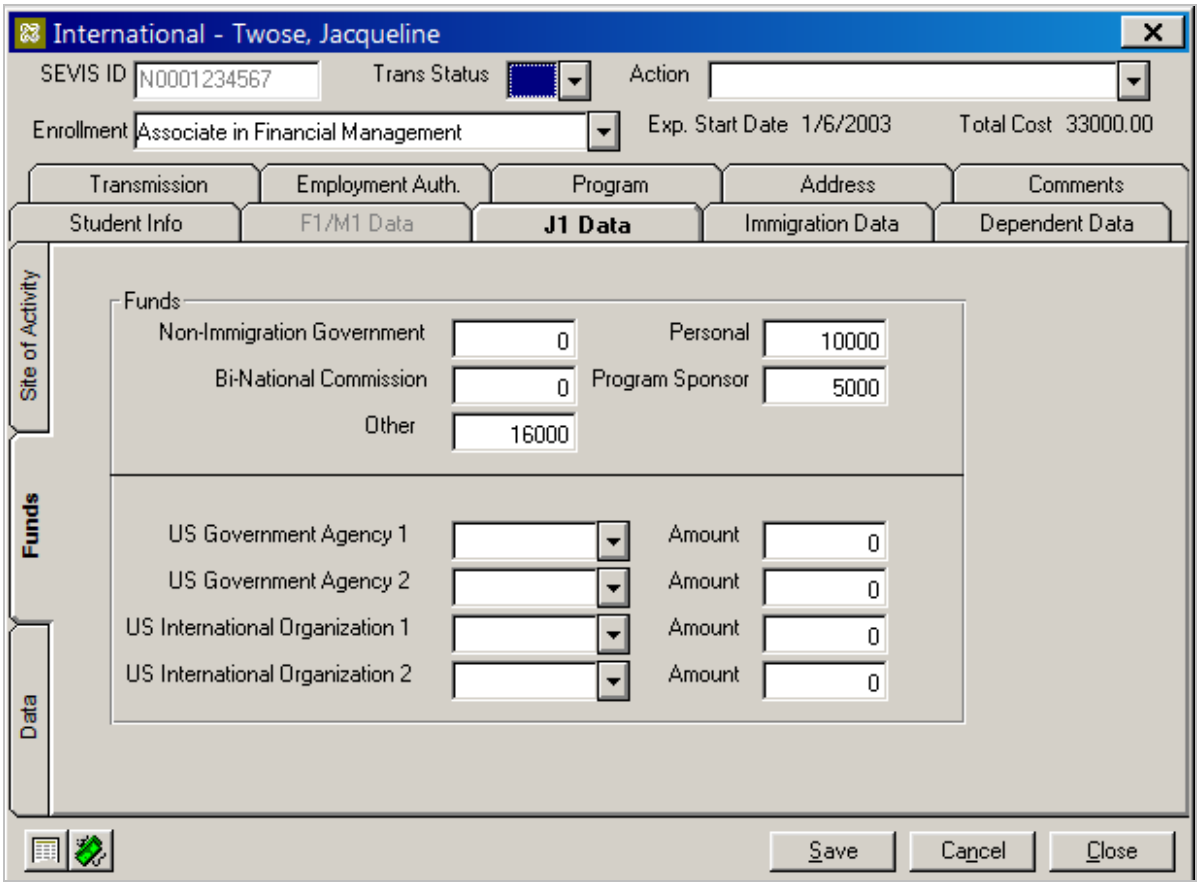
   Note: This option does not appear on your menu unless you have selected an NI student.
3. Select the **J1 Data** tab. The J1 Data tab has three subtabs on the left side: Data, Funds, and Site of Activity.
4. Select the **Data** subtab and enter appropriate data in the following fields:

   - Form Number
   - Position Code
   - Subject
   - Category
   - Country of Birth
   - Last Permanent Residence Country
   - EV Matriculation
   - Infraction Type
   - Remarks for IAP-66/DS-2019



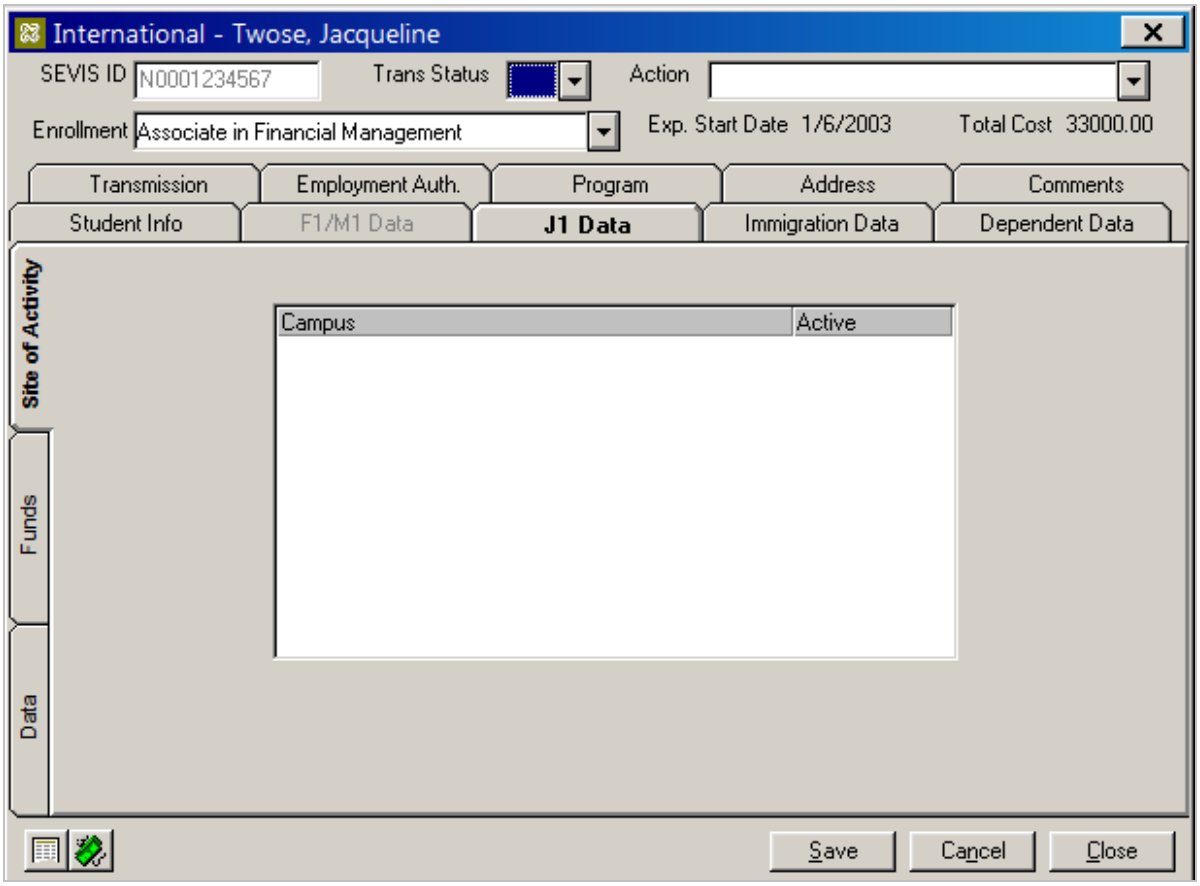
5. Select the **Funds** subtab and enter appropriate data in the following fields:

   - Non-Immigration Government Funds
   - Personal Funds
   - Binational Commission Funds
   - Program Sponsor Funds
   - Other Funds
   - US Government Agency 1 Code and Amount
   - US Government Agency 2 Code and Amount
   - US International Organization 1 Code and Amount
   - US International Organization 2 Code and Amount



6. Select the **Site of Activity** subtab and enter appropriate data in the following fields. These fields may be displayed if the NI is a J-1 Visa Type.

   - Program Category (select from predefined SEVIS list).
   - Program Subject (select from predefined SEVIS list).
   - Position (select from predefined SEVIS list).
   - Site Name (Site of Activity) (Campus).



7. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Immigration Data

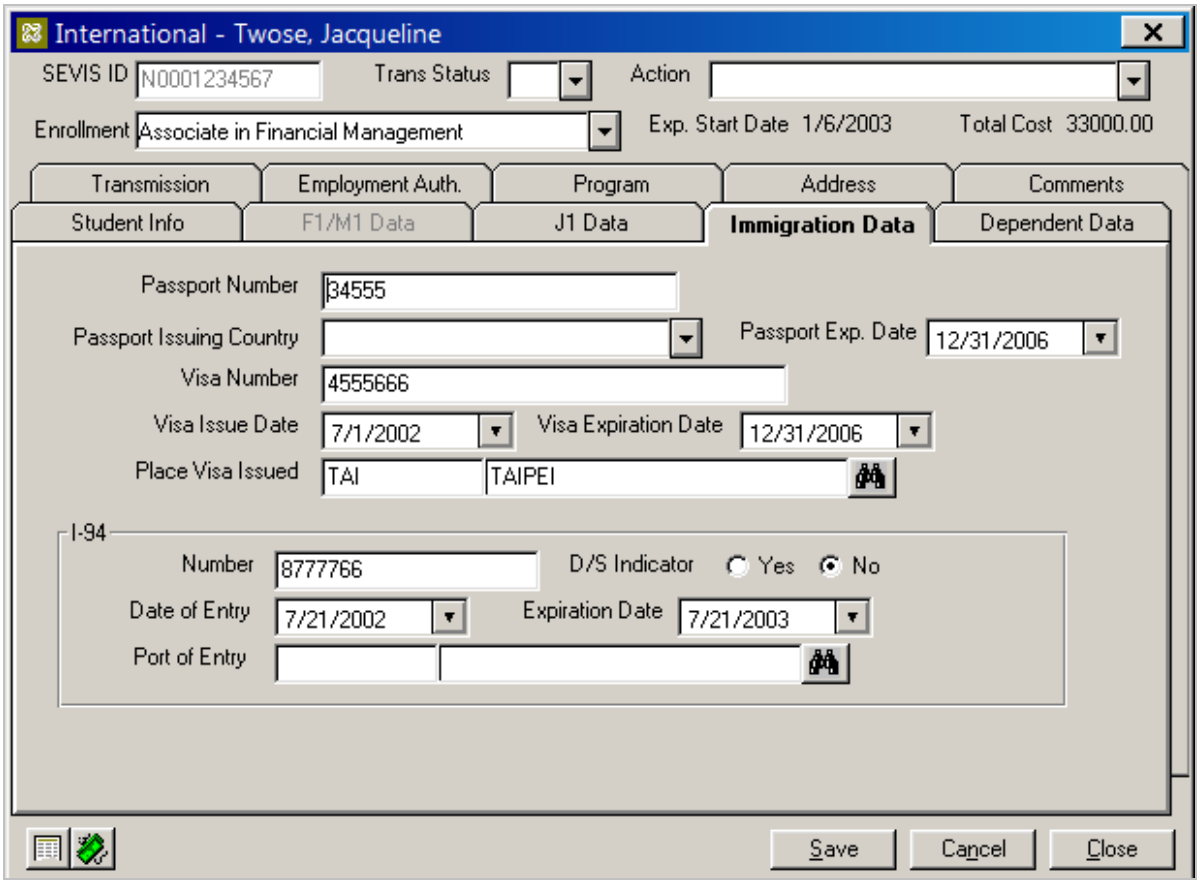
The Immigration Data tab on the International form applies to all NI visa types.

To record the international student's immigration data:

1. Select an international (NI - nonimmigrant) student.
2. Navigate to **View > Contact Manager > International**. The International form is displayed.

   Note: This option does not appear on your menu unless you have selected an NI student.
3. Select the **Immigration Data** tab and enter appropriate data in the following fields:

   - Passport Number
   - Passport Issuing Country
   - Passport Expiration Date
   - Visa Number
   - Visa Issue Date
   - Visa Expiration Date
   - Place Visa Issued
   - I-94 Number
   - I-94 D/S Indicator
   - Date of Entry
   - I-94 Expiration Date
   - Port of Entry



4. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Dependent Data

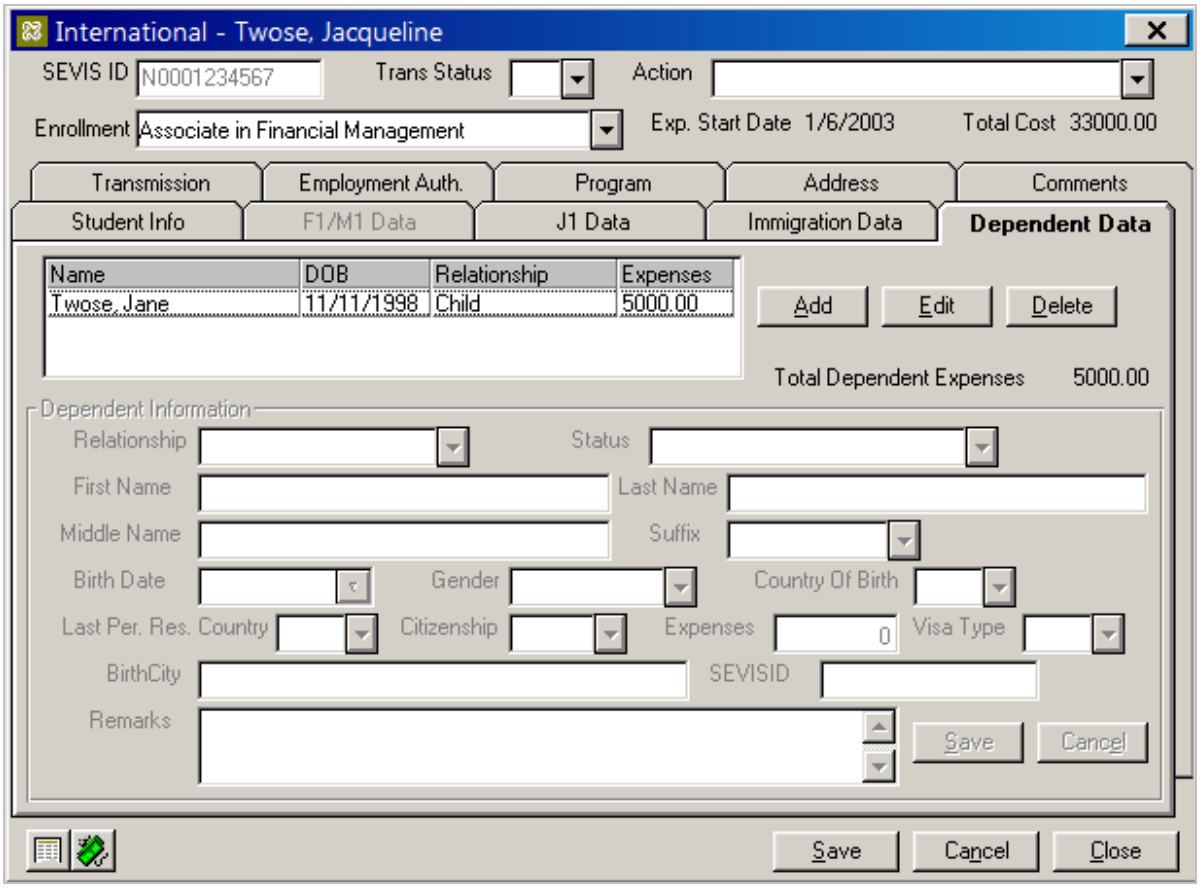
The Dependent Data tab on the International form contains information about the student's (or exchange visitor's) dependents. All students and EVs are eligible to bring spouse and dependent, unmarried children. Funds required for dependents could be calculated and/or entered on this tab if not included elsewhere.

Note: Dependents are deleted from a student's record only by an action transmitted from SEVIS.

To record the international student's dependent data:

1. Select an international (NI - nonimmigrant) student.
2. Navigate to **View > Contact Manager > International**. The International form is displayed.

   Note: This option does not appear on your menu unless you have selected an NI student.
3. Select the **Dependent Data** tab.



4. Click **Add**, or select a record and click **Edit**.
5. Specify appropriate data in the following fields:

   - Relationship
   - Status
   - First Name
   - Last Name
   - Middle Name

- Suffix
- Birth Date
- Gender
- Country of Birth
- Last Permanent Residence Country
- Citizenship
- Expenses
- Visa Type
- Birth City
- Remarks

6. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

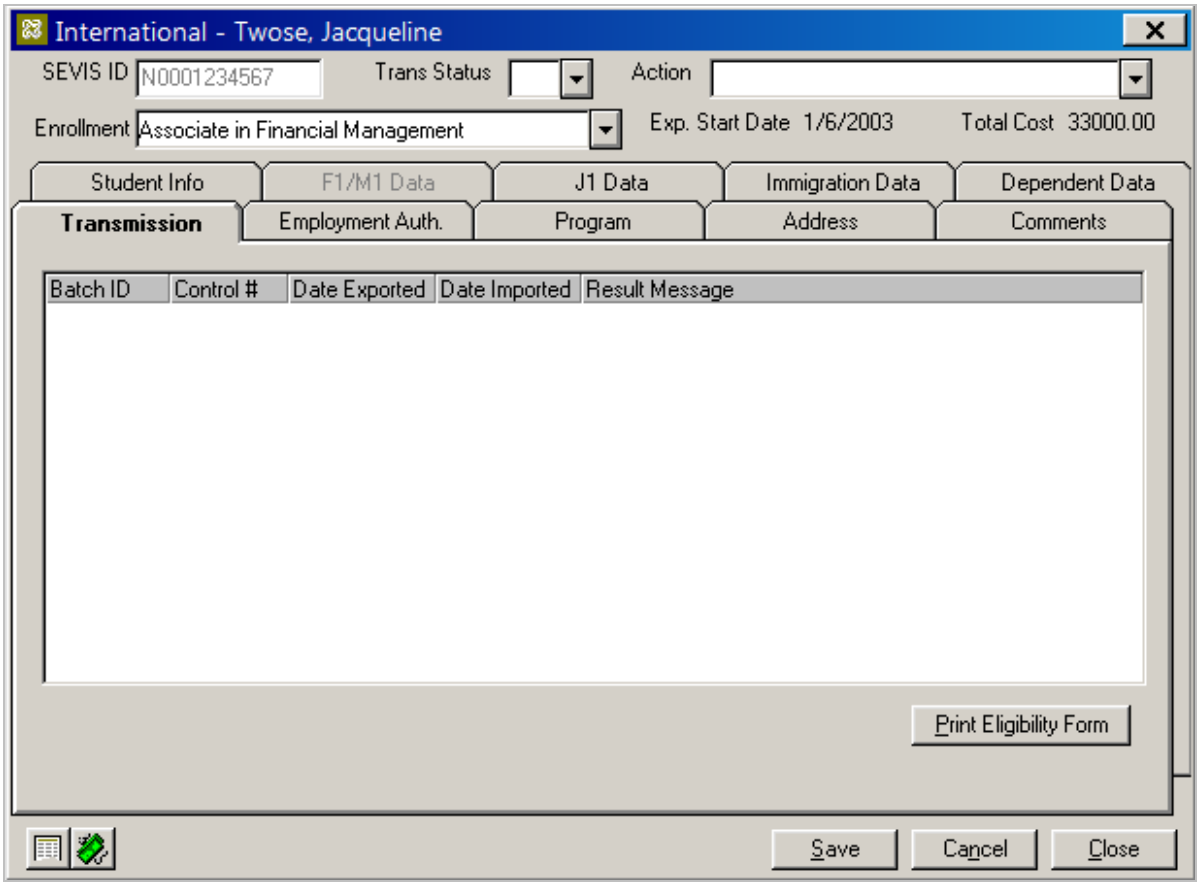
Transmission

The Transmission tab on the International form is used only for F1, M1, and J1 nonimmigrant visa types. It shows a list of transmissions related to the selected student.

To access the international student's transmission data:

1. Select an international (NI - nonimmigrant) student.
2. Navigate to **View > Contact Manager > International**. The International form is displayed.

   Note: This option does not appear on your menu unless you have selected an NI student.
3. Select the **Transmission** tab.



4. SEVIS creates a PDF file for each record that results in the creation of an I-20 or DS-2019 form. Each I-20 or DS-2019 is provided in a separate PDF file that may be printed by the user system. Click **Print Eligibility Form** to print the student's bar-coded eligibility form (I-20/DS-2019 PDF file).
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Employment Authorization

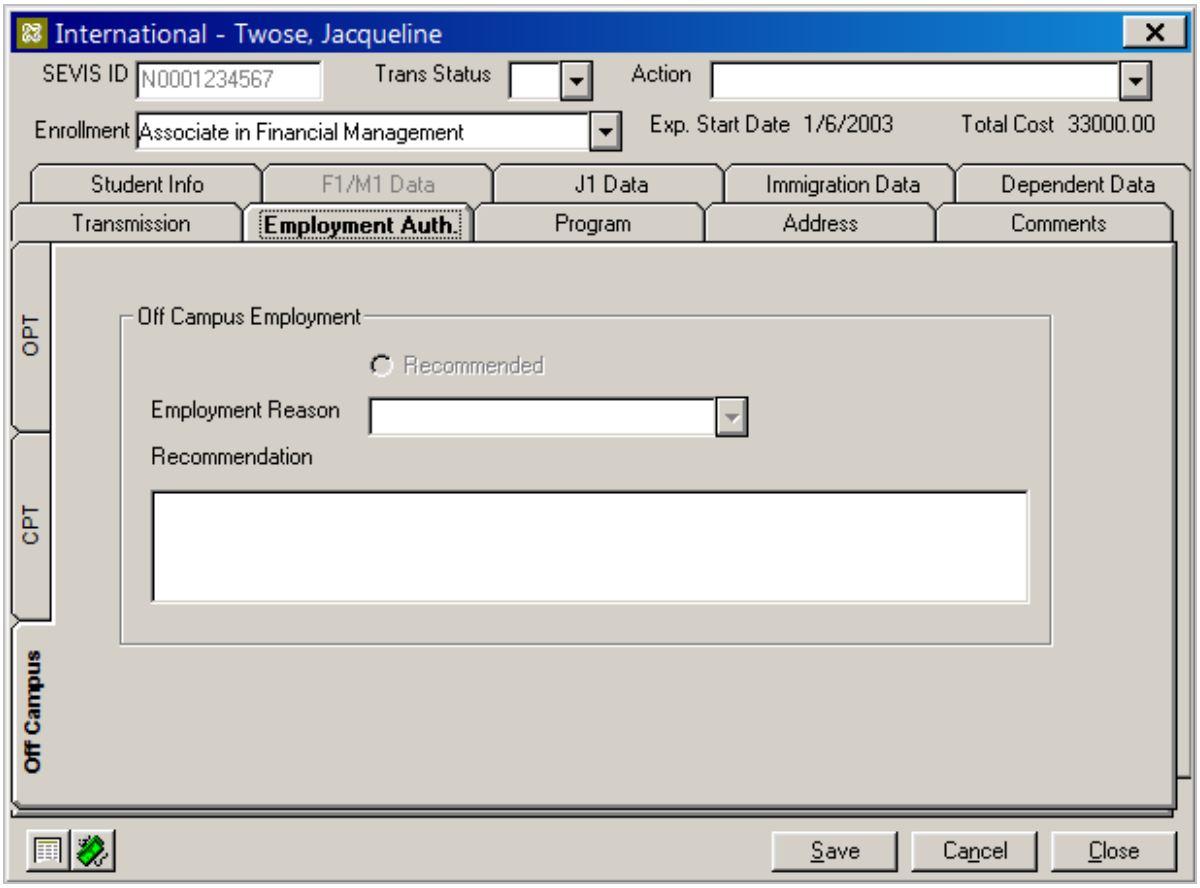
The Employment Authorization tab on the International form applies to all NI visa types. The Curricular Practical Training (CPT) subtab displays information about the student's application for training related to his or her program of studies. The Optional Practical Training (OPT) sub-tab displays information about the student's application for training that is related to his or her course of study.

To record the international student's employment authorization data:

1. Select an international (NI - nonimmigrant) student.
2. Navigate to **View > Contact Manager > International**. The International form is displayed.

   Note: This option does not appear on your menu unless you have selected an NI student.
3. Select the **Employment Authorization** tab. The tab has three subtabs on the left side: Off Campus, CPT, and OPT.
4. Select the **Off Campus** subtab and enter appropriate data in the following fields:

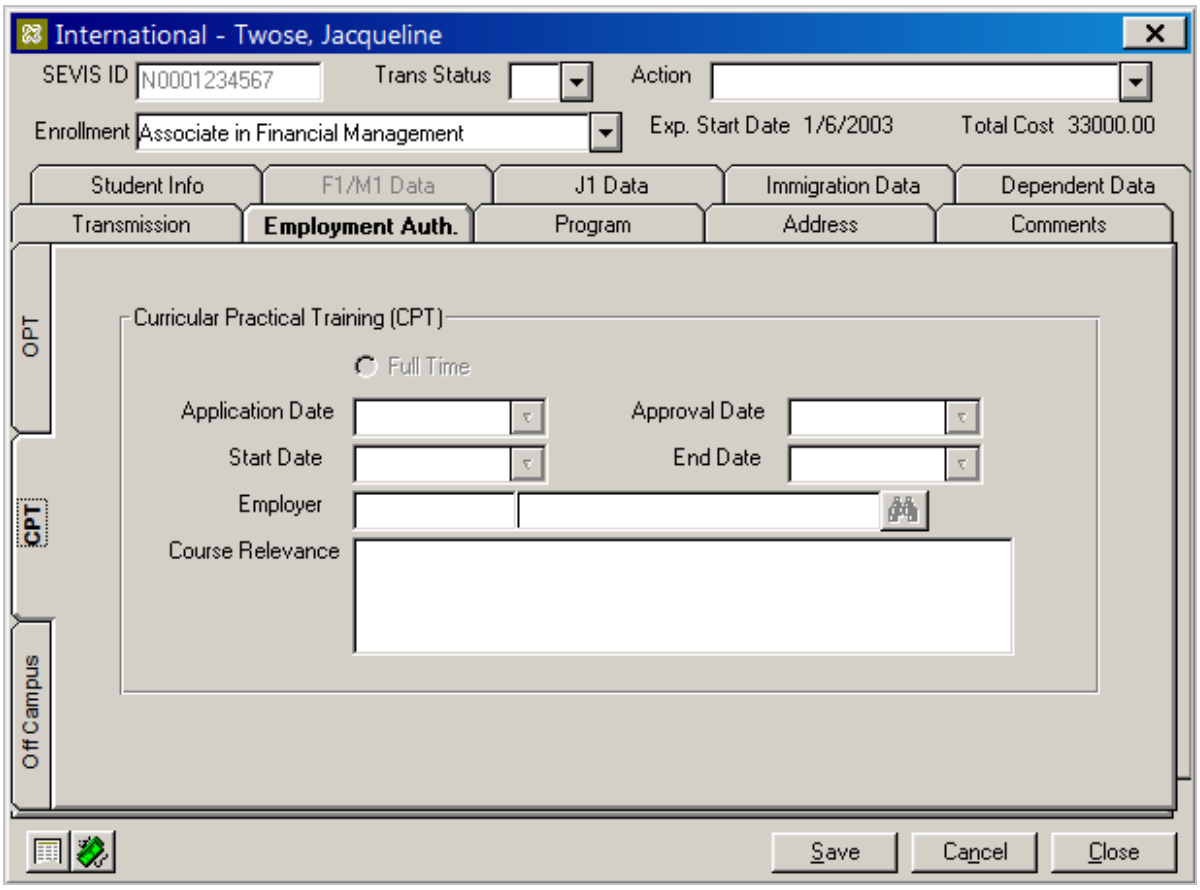
   - Employment Reason
   - Recommendation



5. Select the **CPT** (Curricular Practical Training) subtab and enter appropriate data in the following fields:

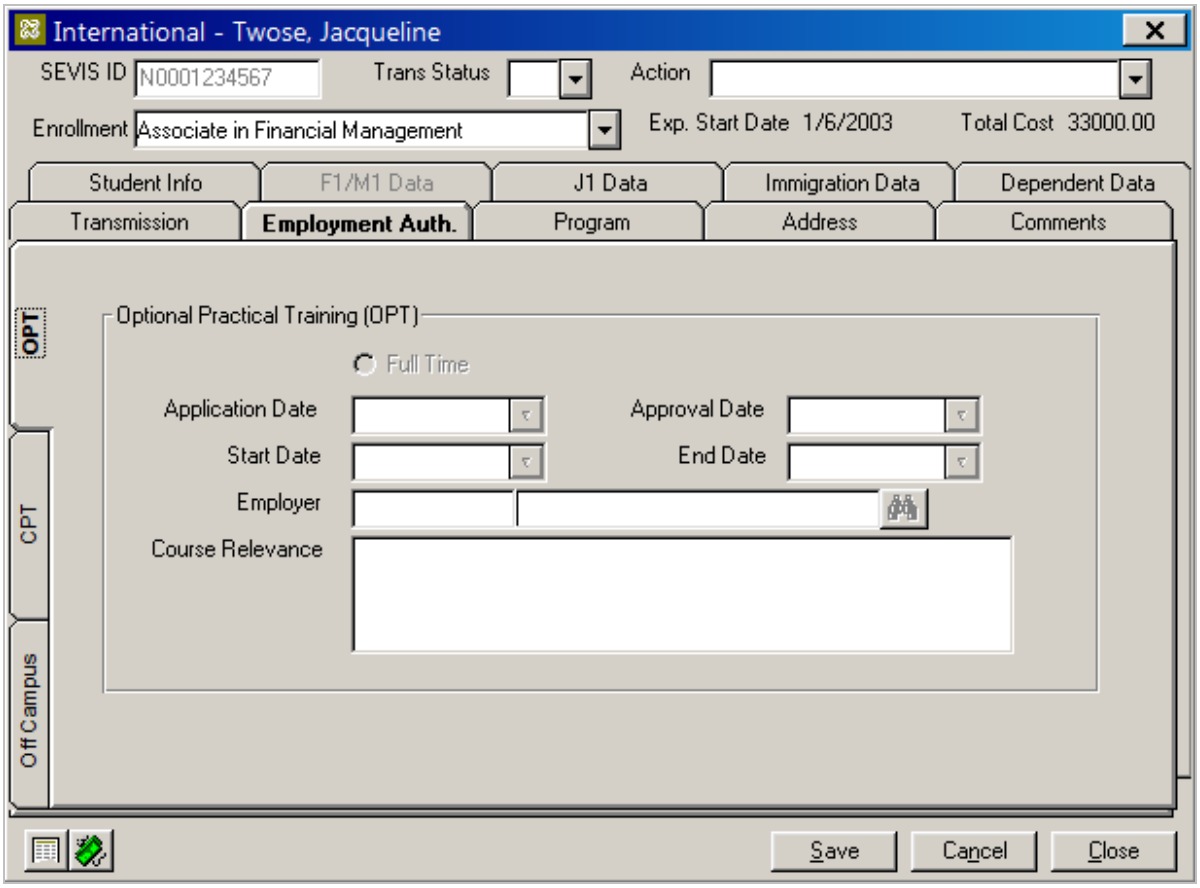
   - Application Date
   - Approval Date

- Start Date
- End Date
- Employer
- Course Relevance



6. Select the **OPT** (Optional Practical Training) subtab and enter appropriate data in the following fields:

   - Application Date
   - Approval Date
   - Start Date
   - End Date
   - Employer
   - Course Relevance



7. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Program

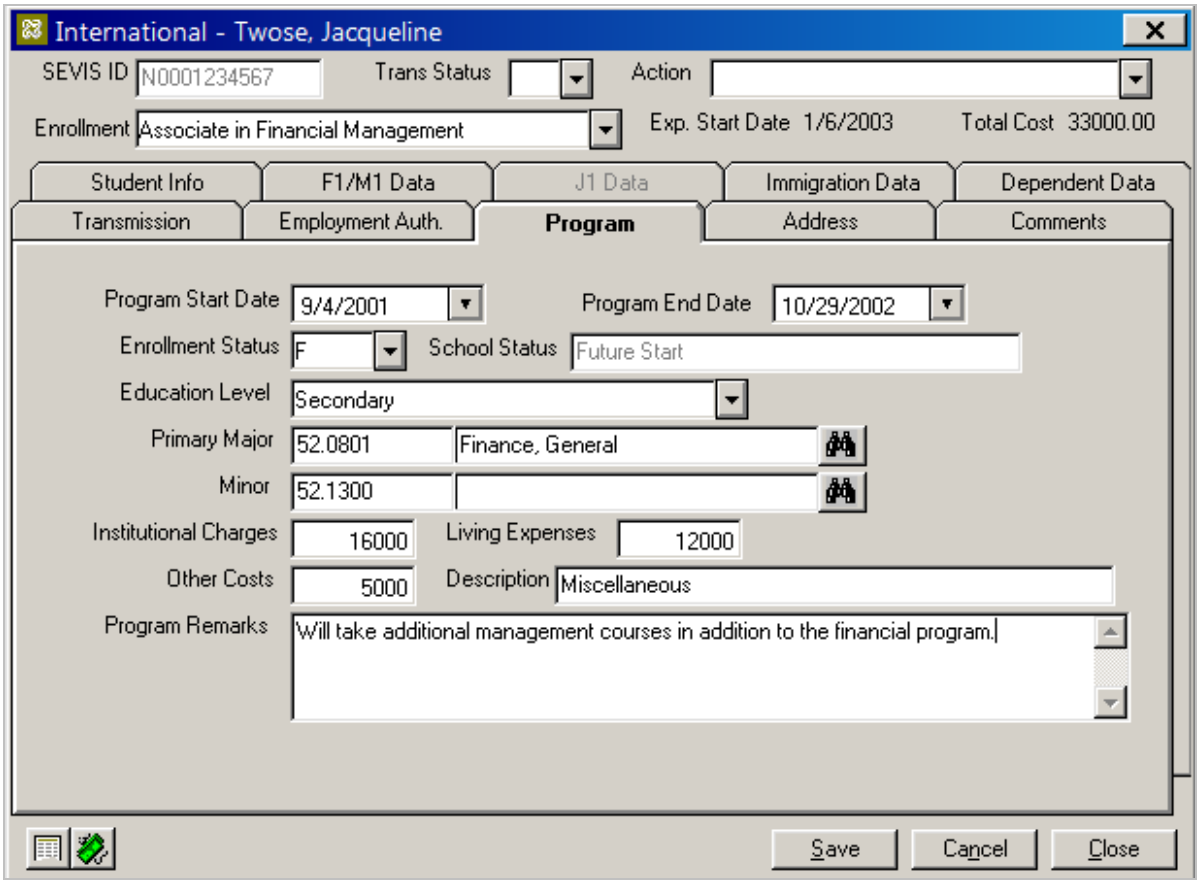
The Program tab on the International form displays information about the NI student's program of study and about expenses related to the program.

To record the international student's program data:

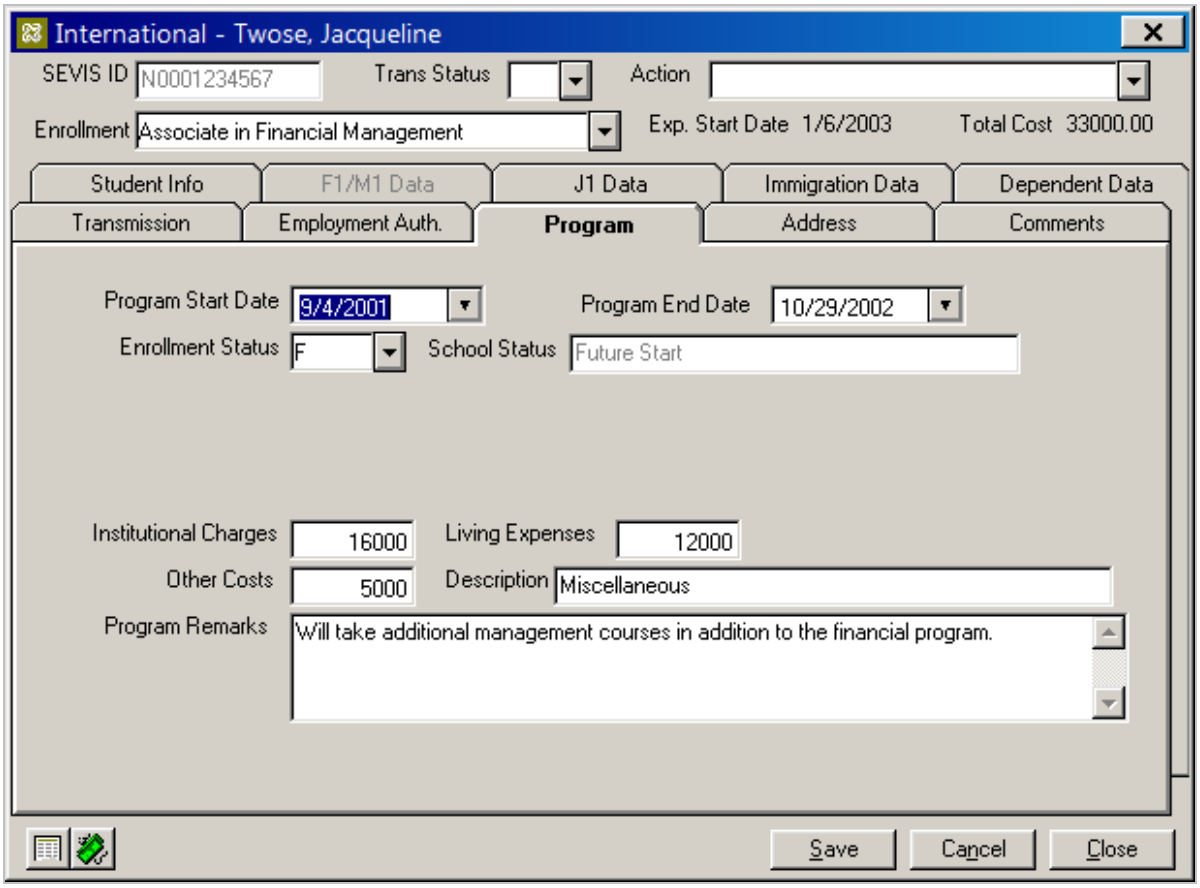
1. Select an international (NI - non-immigrant) student.
2. Navigate to **View > Contact Manager > International**. The International form is displayed.

   Note: This option does not appear on your menu unless you have selected an NI student.
3. Select the **Program** tab. The form is slightly different for F1/M1 students and J1 students.

   Program Tab for F1/M1 Student



Program Tab for J1 Student



4. Select or enter Program data as required.

    - Program Start Date
    - Program End Date
    - Enrollment Status
    - School Status
    - Education Level
    - Primary Major
    - Minor
    - Institutional Charges
    - Living Expenses
    - Other Costs
    - Description
    - Program Remarks

5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

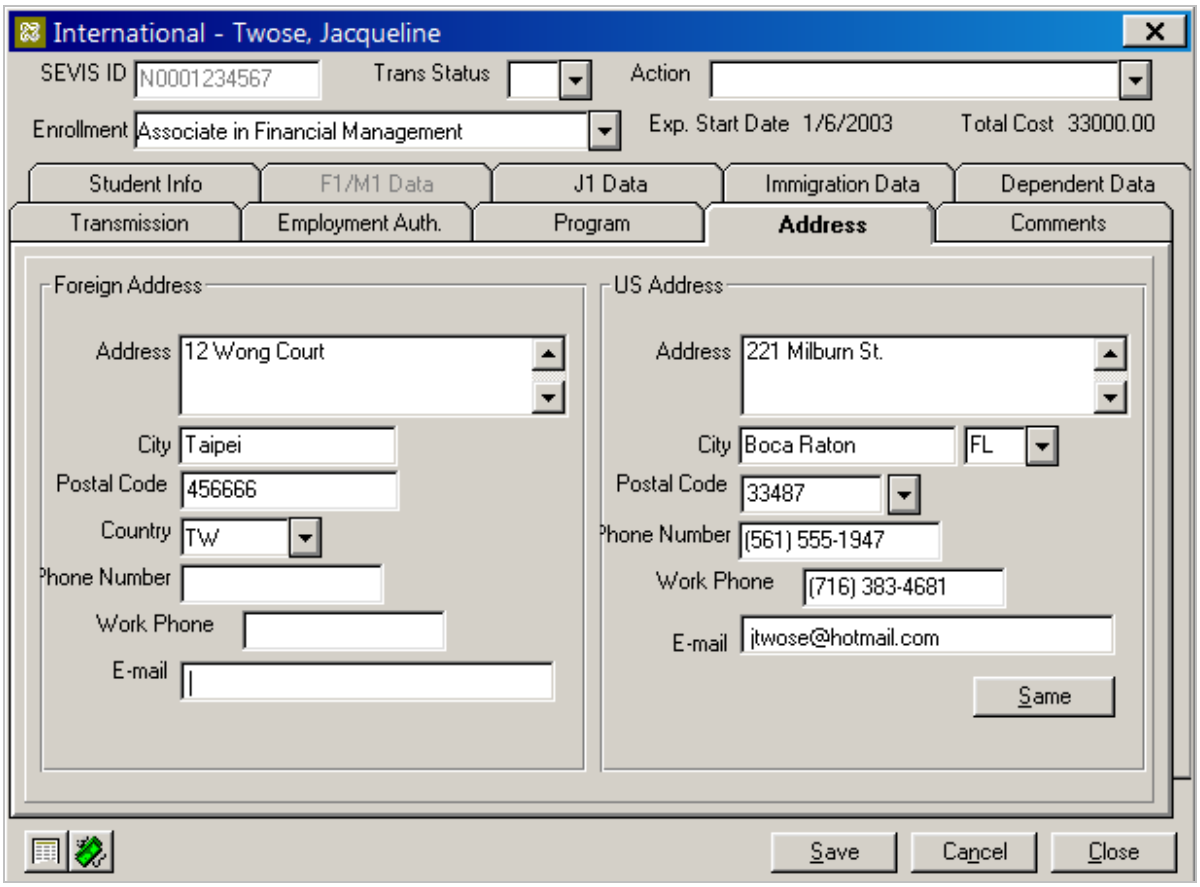
Address

The Address tab on the International form contains the student's foreign and U.S. addresses.

To record the international student's address data:

1. Select an international (NI - nonimmigrant) student.
2. Navigate to **View > Contact Manager > International**. The International form is displayed.

   Note: This option does not appear on your menu unless you have selected an NI student.
3. Select the **Address** tab.



4. Enter the student's **Foreign Address** and **U.S. Address**.

   If applicable, click **Same** to copy the U.S. Address from the Student Master record.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. .

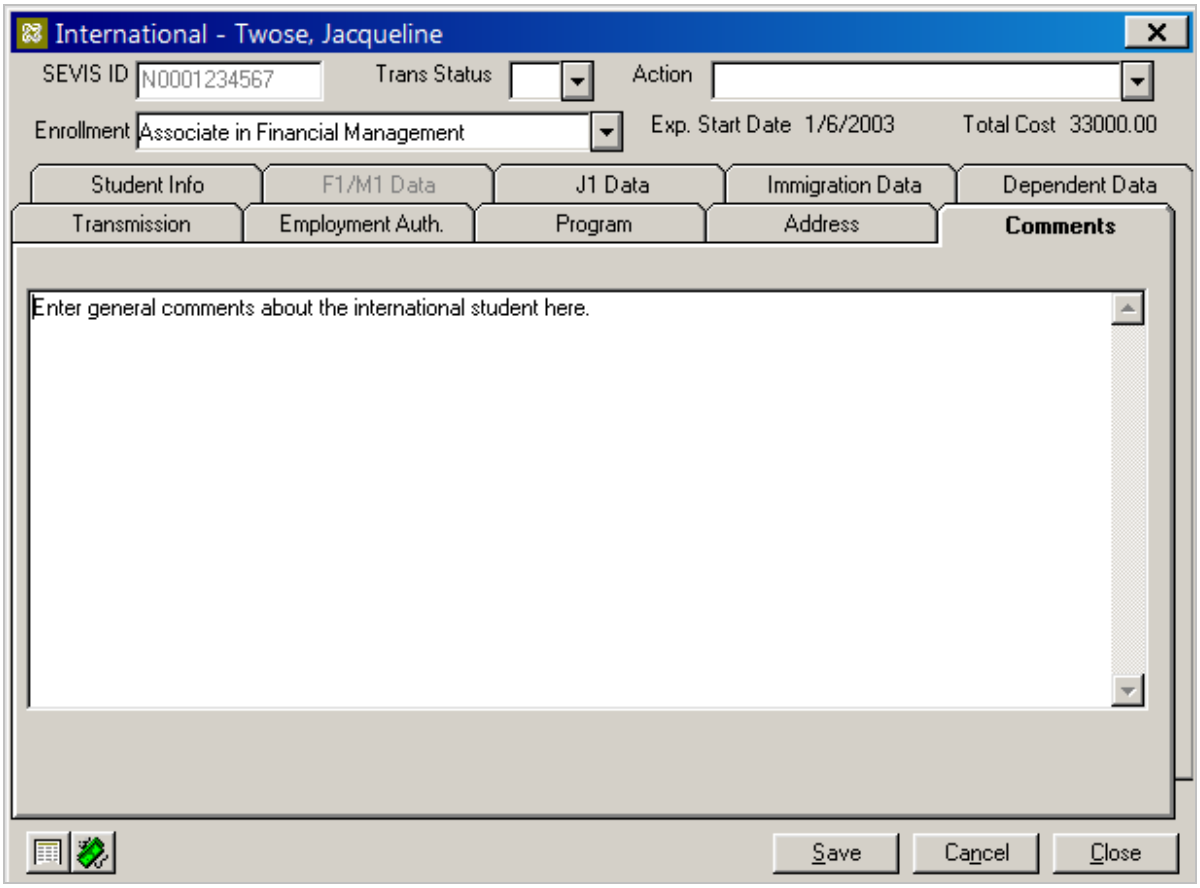
Comments

Use the Comments tab on the International form to enter general comments about the international student.

To record comments about the international student:

1. Select an international (NI - nonimmigrant) student.
2. Select **View > Contact Manager > International**. The International form is displayed.

   Note: This option does not appear on your menu unless you have selected an NI student.
3. Select the **Comments** tab.



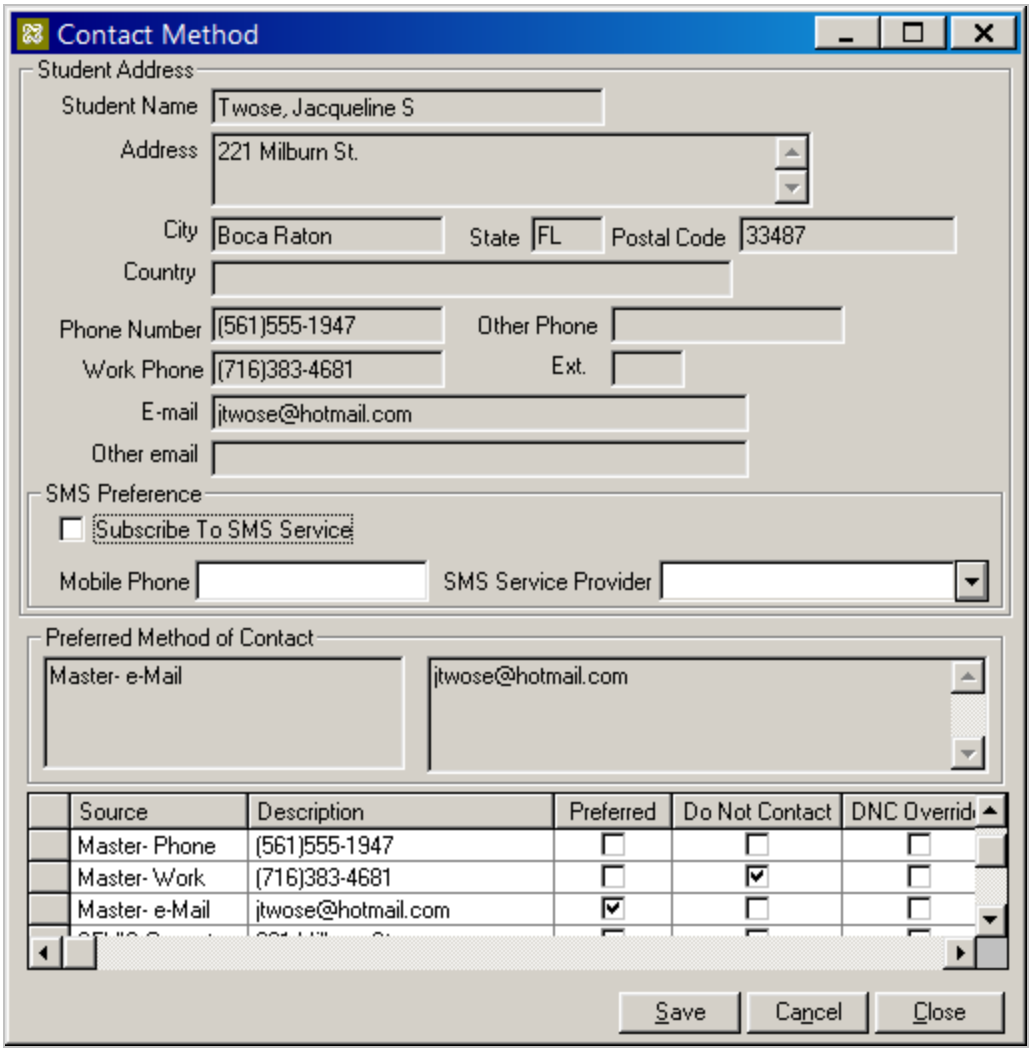
4. Enter any comments in the **Comment** field.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Contact Method

The Contact Method form enables you to select the preferred method for contacting a student. This form pulls the data from the Student Master and the student Addresses forms.

To set up the student's preferred contact method:

1. Select a student.
2. Navigate to **View > Contact Manager > Contact Method**. The Contact Method form for the selected student is displayed.



3. For the student to subscribe to receive SMS text messages, select the **Subscribe to SMS Service** check box and select an **SMS Service Provider**. A prerequisite is that the student has a mobile phone number on the Student Master form.

   If the **Subscribe to SMS Service** check box is not selected, the student has not subscribed or has unsubscribed and does not want to receive text messages from the institution. Students can use Portal to subscribe and

unsubscribe.

4. Select only one **Preferred** method of contact.
5. Select one or more **Do Not Contact** sources.
6. If the student's status is Lead and the most recent Lead Date is greater than 90 days, the phone number is masked, unless a **DNC Override** is on file. An override document stores any exceptions to the DNC list. Students with phone numbers listed on the DNC list, but who permit phone calls from the institution, require an override to comply with FTC rules.

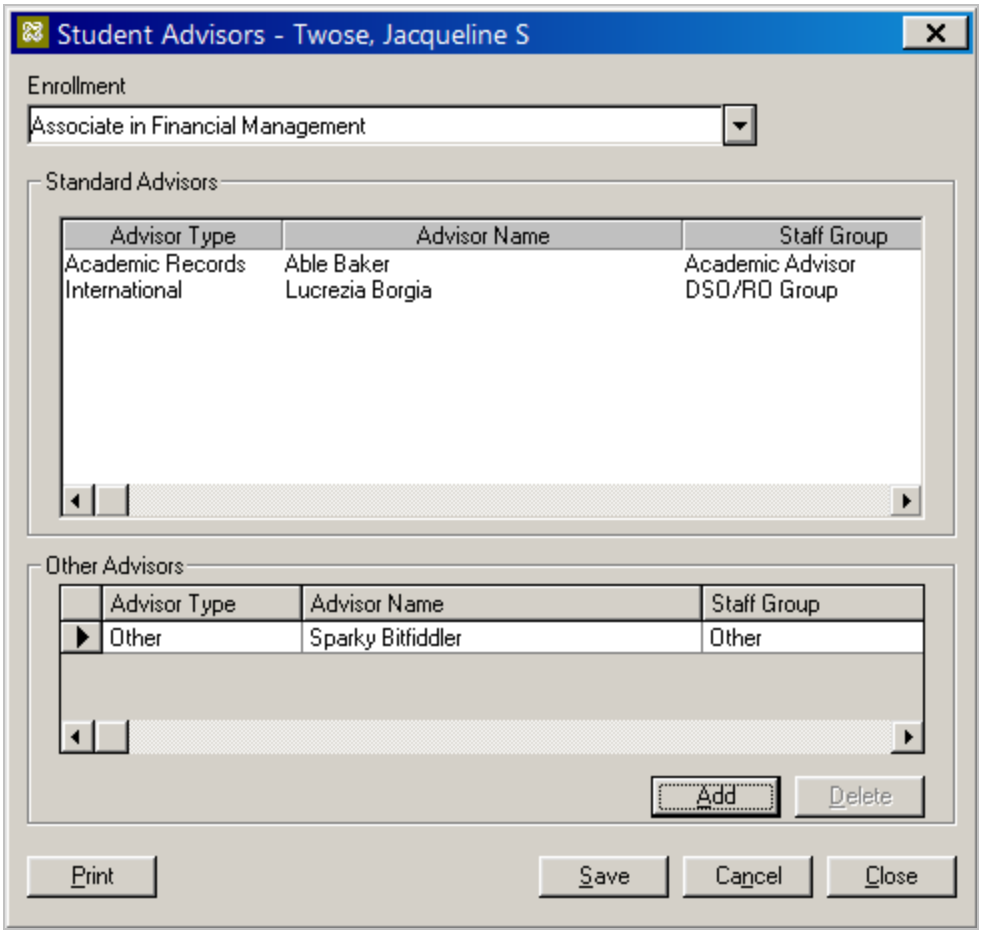
   Identify the override document in the Setup > Campus Locations > Contact Info (tab). During updates, if the phone number is also on file for the defined override document, it will be restored and displayed in CampusNexus Student as a number that is permissible to call.

Advisors

The Advisors form in Contact Manager contains all advisors for a student. By default the information in the form displays the advisors for a student's most current enrollment.

To view a student's advisor list:

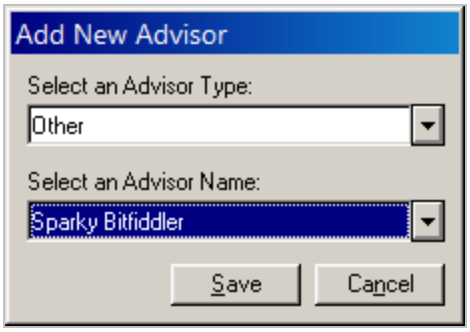
1. Select a student.
2. Navigate to **View > Contact Manager > Advisors**. The Student Advisors form for the selected student is displayed.



3. If the student has more than one enrollment, select the enrollment for which you want to see the advisors. The top of the form lists the student's *Standard Advisors*. The Standard Advisors are selected on other forms throughout CampusNexus Student.

   If you attempt to view the advisor list for a student that is not yet enrolled, a message indicates that the student is not yet enrolled. For a student that is not yet enrolled you can only select advisors in the *Other Advisors* groups.

4. Click **Add** to add Other Advisors. The Add New Advisor form is displayed. Only advisors belonging to a staff group with an Advisor Type code of OTH - Other Advisor are listed on this form. Other Advisor staff groups are set up under **Setup > Staff > Staff Groups**.



5. Select an **Advisor Type** and an **Advisor Name**.
6. Click **Save**. You are returned to the Student Advisors form.
7. To delete Other Advisors, select a row in the grid and click **Delete** .
8. Click **Print** and choose **Selected Enrollment** or **All Enrollments** to print a list of the student's advisors for the current enrollment or for all enrollments. The report includes Student Name, Enrollment Program, Advisor Type, and Advisor Name.

Standard Advisor Selection

Standard Advisors for students are initially selected during enrollment. You can set up a set of default advisors at Daily > Contact Manager > Default Campus Advisors. When you enroll a student, the default advisors appear on an advisor page of the enrollment wizard. Whether the advisor page is displayed during enrollment is controlled by an option in Setup > Academic Records > Enrollment.

Reassigning Advisors

Note: You can change a student's advisors only if you have been given permission to do so in the Setup > Staff > Staff Information > Contact Manager form. The check box **Allow Editing of Advisors** must be selected.

CampusNexus Student has a flexible advisor feature which allows institutions to assign advisors per module and to designate an unlimited number of other advisors. For each module, student advisors are shown and changed on the following forms.

Advisor Forms

Module	Form
Academic Records	View > Academic Records > Enrollment > Date-Status tab
Admissions	View > Admissions > Student (Admissions Rep)
Financial Aid	View > Financial Aid > Academic Year
Loan Management	View > Loan Management > Loan Management
Placement	View > Career Services > Placements
Student Accounts	View > Student Accounts > Ledger Cards
International	View > Contact Manager > International

If an advisor changes or is no longer with your institution, you need to re-assign students to one or more other advisors. When you transfer advisors, you can re-assign all Contact Manager activities to the new advisor(s) automatically. This does not apply for students who had no previous advisor. CampusNexus Student also tracks advisor changes to the admission audit folder.

To use the Advisor Assignment Wizard to re-assign students in batches and override automatic features to assign specific advisors:

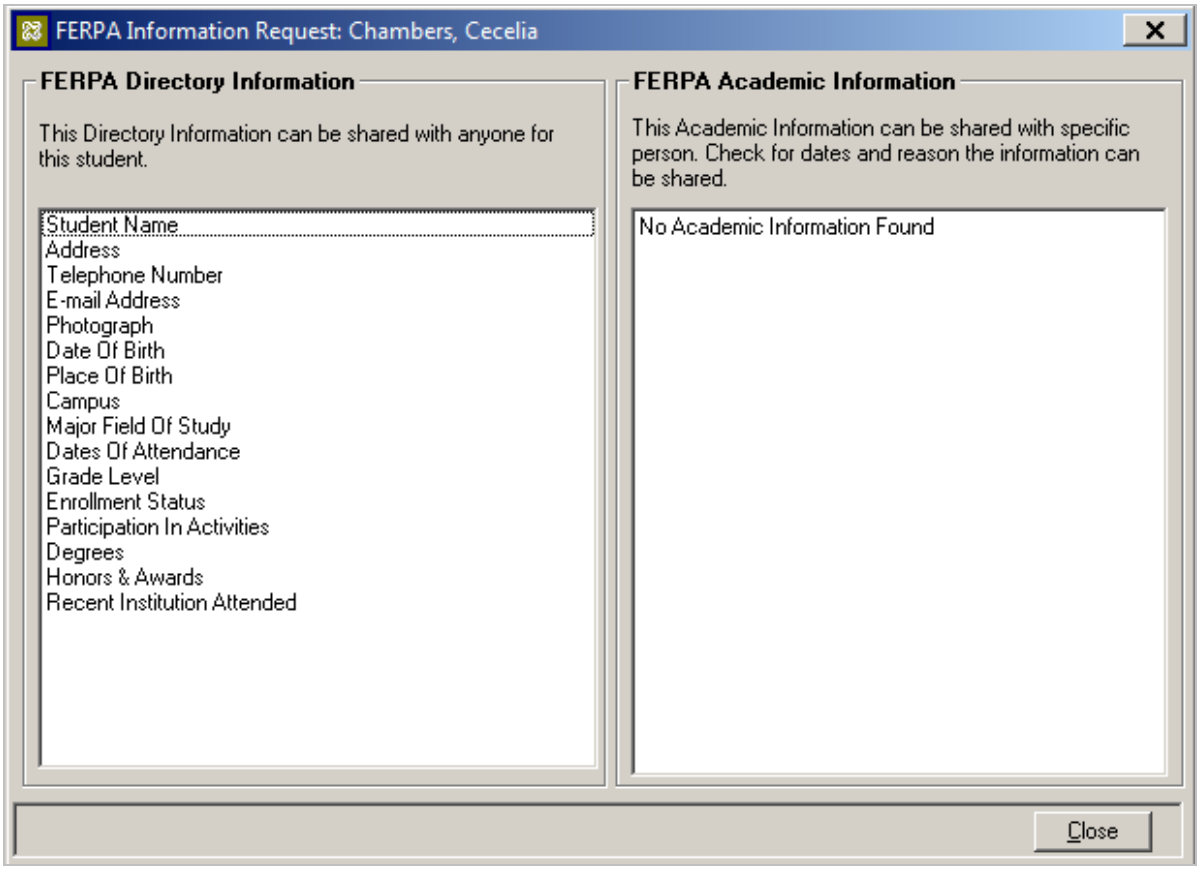
1. Student General Selection Criteria. It is important that you select **Re-assign Student Advisor** or **Assign Students without an Advisor**.
2. Student Statuses & Program Versions to be Included.
3. Select Advisors to Assign: Select **Select All**, **Clear All** or **Distribute**. If you select **Distribute**, the students in the batch will be distributed equally among all advisors whose names you have selected.
4. Ready to Reassign: This form shows all students ready to be assigned or reassigned. If you click **Next**, a dialog box prompts you to print a report.
5. Reassigned Students: a list of students that will be (re)assigned. At this point, you can manually remove a student if required. There is also a **Print** button that enables you to print a report of the students to be processed. Click **Finish** to finalize the assignments.
6. Advisor Assignment Review. This is a summary report that includes Student Name, ID#, Program Version, Start Date, Grad Date, and Reassigned Advisor.

FERPA Student Information

Displaying FERPA Directory Information and Academic Information

Click the FERPA icon in the standard toolbar to display the student's Directory Information and Academic Information that can be disclosed.

Note: The Academic Information window displays only Active requests of contacts.



Adding/Editing FERPA Student Information

Open the FERPA student information form for a student in one of two ways:

- Click the FERPA folder in the Contact Manager group of the Student Bar, or
- Select **View > Contact Manager > FERPA**.

The FERPA student information form consists of three tabs:

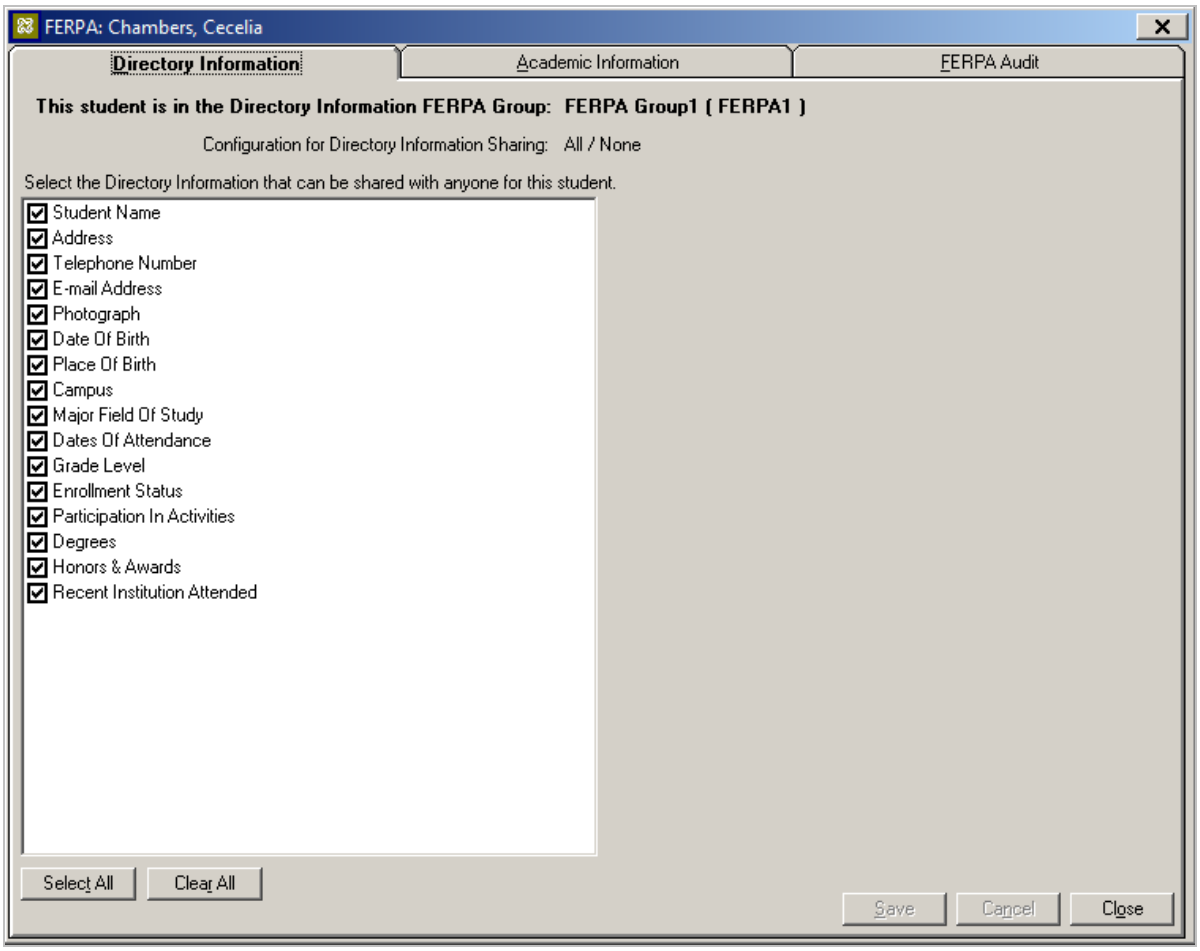
- Directory Information
- Academic Information
- FERPA Audit

Directory Information Tab

The Directory Information tab displays the student's directory information:

- The FERPA Group name and code corresponding to the student's campus.
- The Directory Information Sharing configuration for this FERPA Group.

- A list box displaying all Directory Information details selected at the FERPA Group level.
- The Directory Information which is selected by student is displayed as selected.



Notes:

- When the Directory Information Sharing configuration is set to **All**, the list box is disabled, so you cannot select individual directory information details. In such cases, you can use the **Select All** or **Clear All** buttons.
- When the Directory Information Sharing configuration is set to **Partial**, the list box is enabled so that you can select individual directory information details for the student.

When the form opens and the Directory Information tab is active, the Save and Cancel buttons are initially disabled. Save and Cancel are enabled when the student's directory information is changed. Click **Save** to save the directory information to the database.

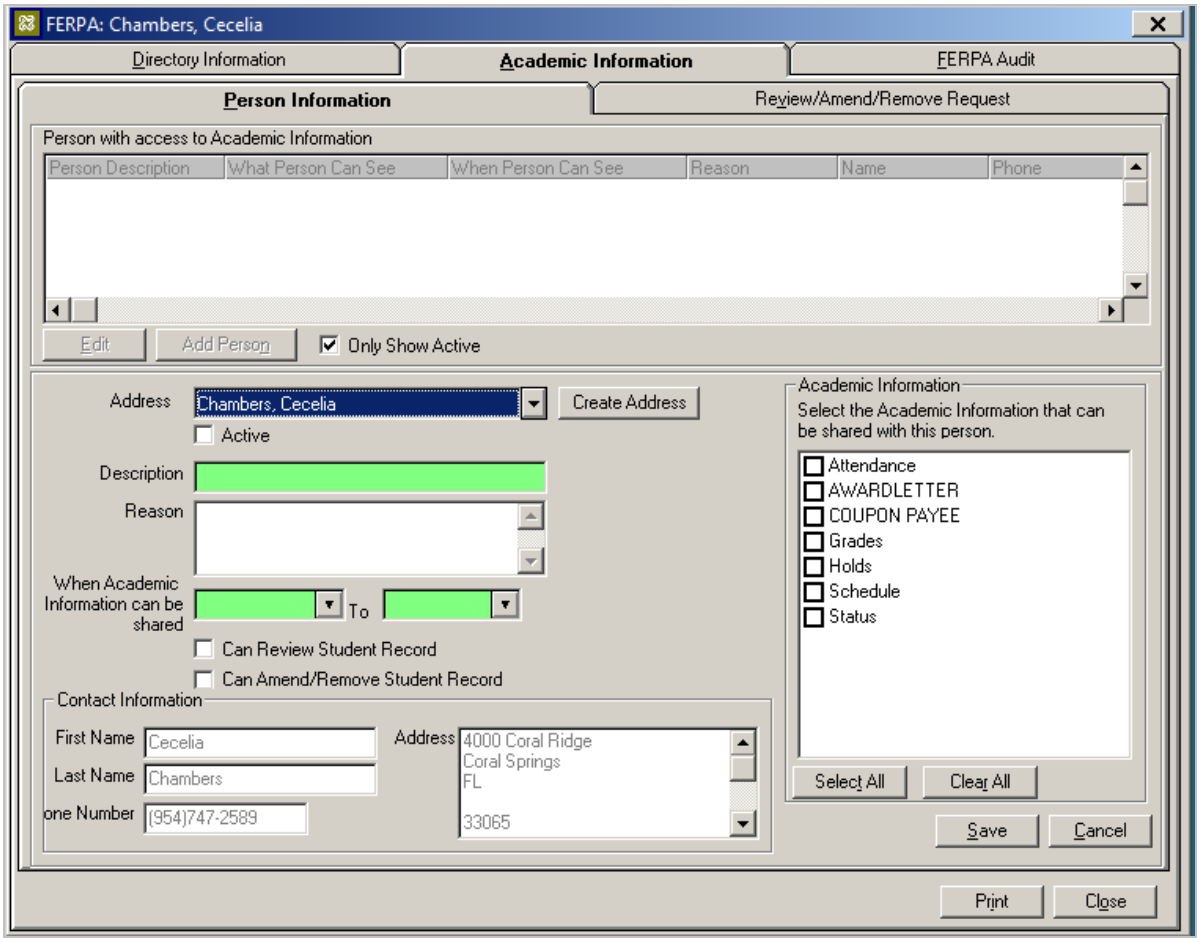
Academic Information Tab

The Academic Information tab displays academic information related to the student in two subtabs:

- Person Information
- Review/Amend/Remove Request

Person Information Subtab

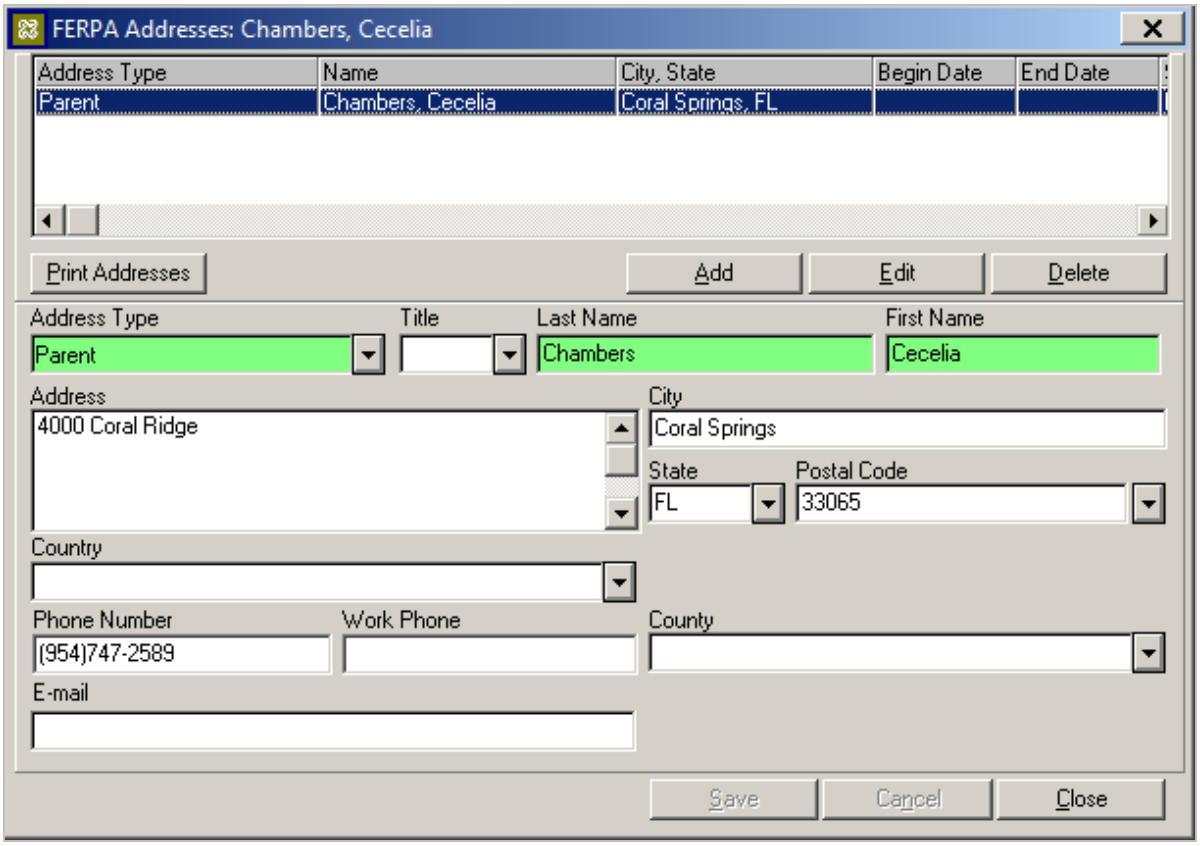
This subtab displays the student's Person Information in the upper grid. The **Person with access to Academic Information** grid contains information about persons with whom a student's information can be shared.



1. Select an address from the **Address** list or create a new FERPA address by clicking **Create Address**.
2. When you select an address from the Address list, all the details of the address are displayed under **Contact Information**. All academic information is displayed in the **Academic Information** list box.
3. By default, none of the Academic Information is selected, and you can select the Academic Information details which can be shared.
4. The **Active** check box is cleared by default.
5. When the **Can Review Student Record** check box is selected, the Person Information is displayed in the Review Requested By list on the Review/Amend/Remove Request tab.
6. When the **Can Amend/Remove Student Record** check box is selected, the Person Information is displayed in the Amend/Remove Requested By list on the Review/Amend/Remove Request tab.
7. Click **Add Person** to create a new contact by button. Select an existing contact and clicking **Edit** to modify it.
8. **Note**: A contact (address) can have multiple requests, but only one request should be Active at any given time.
9. Click **Save** to save the person along with the Academic Information to the database.

Creating a New FERPA Address

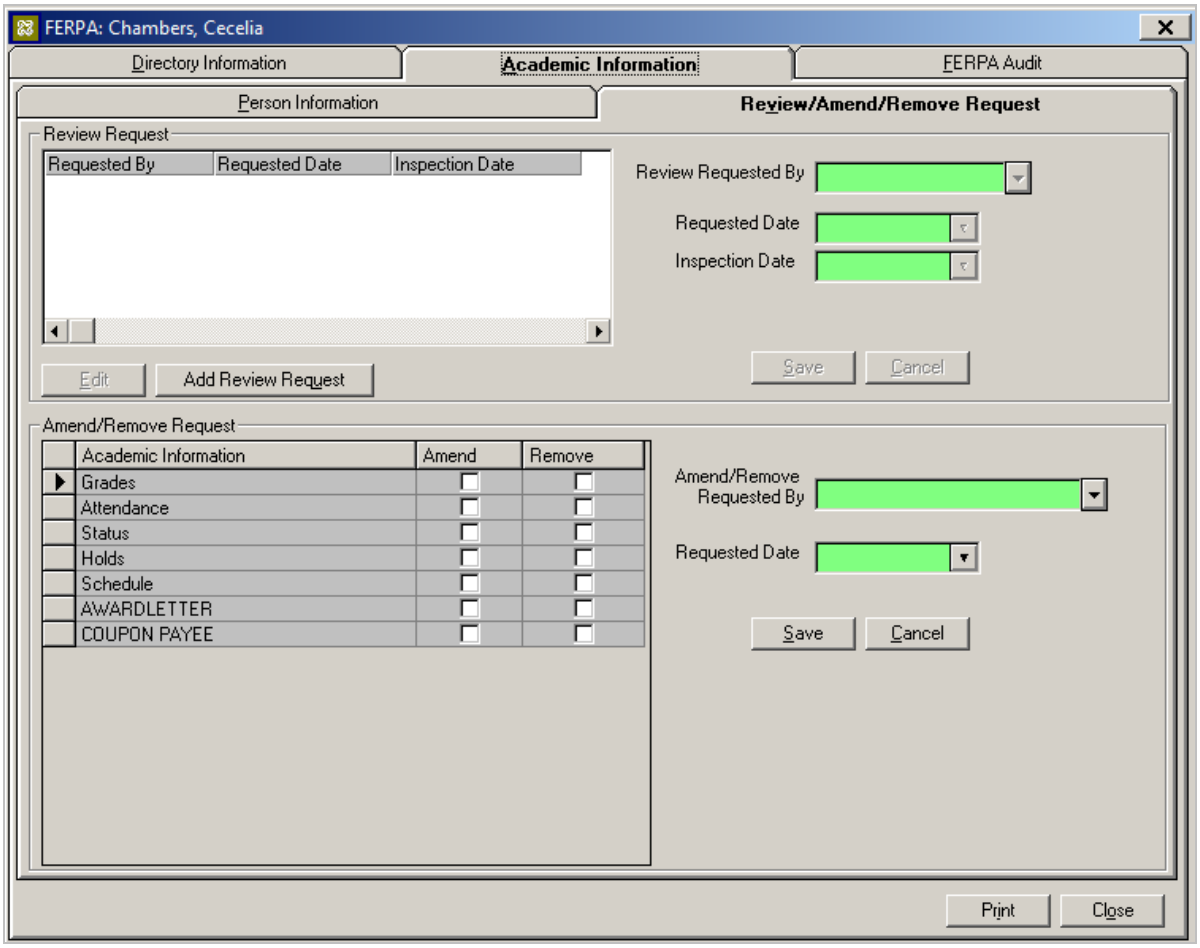
1. Click the **Create Address** button on the Academic Information tab to open the FERPA Addresses form. This form displays all the available addresses in the grid.



2. To add a new address, click **Add**. All fields become editable, and the **Address Type** list displays only FERPA Address Types.
3. Enter all relevant information and click **Save**. The address is saved and the newly added address is displayed in the grid.
4. To change the details for an existing person, select a record in the top grid and click **Edit**.
5. Click **Close**. The newly added address is displayed in the **Address** list on the **Person Information** tab.

Review/Amend/Remove Request subtab

This subtab consists of two sections: Review Request and Amend/Remove Request.



Review Request

This section of the form is used to document details related to Review Requests associated with the student information.

The grid on the left displays previous review records. You can select any record from the grid and edit that record.

Click **Add Review Request** to add new Review Request details. Upon providing all the mandatory information, click **Save** to save the review request to the database. The new record is displayed in grid on the left. To edit any of the records listed in the grid, select the record and click **Edit**.

The **Review Requested By** list displays the student's name and all other "eligible" persons (i.e., persons for which the **Can Review Student Record** check box is selected in the Person Information tab).

Use the **Requested Date** and **Inspection Date** lists to select these dates accordingly.

Amend/Remove Request

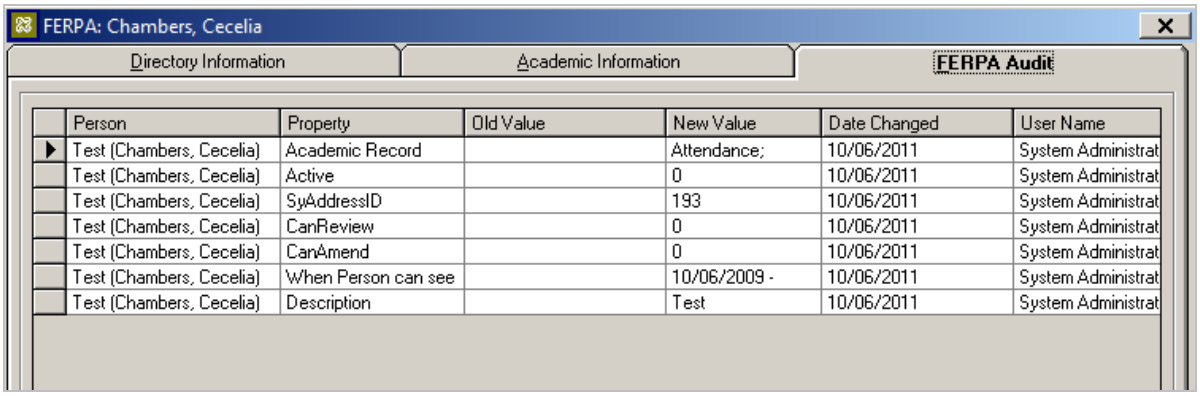
The grid on the left displays the Academic Information and columns of check boxes labeled **Amend** and **Remove**.
Select or clear these check boxes to indicate whether the Academic Information details are to be amended or removed.

The **Amend/Remove Requested By** list displays the student's name and all other "eligible" persons (i.e., persons for which the **Can Amend/Remove Student Record** check box is selected in the Person Information tab).

Upon entering all the relevant information, click **Save** to save the amend/review request to the database.

FERPA Audit Tab

The FERPA Audit tab displays the audit data for the student's Academic Information.



The audit data grid consists of the following columns:

- Contact: Name of person
- Property: Property whose value was change
- Old Value: Old value of the property
- New Value: New value of the property
- Date Changed: Date on which the value was changed
- User name: Name of the user who changed the value

The Audit Information includes changes in the following Academic Information fields:

- Date of Request for the Academic Information
- Change in Effective Date for a contact
- Change in contact information, such as name, address, or phone number
- Change in the Academic Information for a contact

Note: The auditing of the Academic Information is implemented using service broker architecture.

View > Admissions

The Admissions option on the View menu leads to a list of admissions-related folders. The options on this menu apply to the student selected from the Recent Students list.

Menu Item	Description
Student	Displays the Student Master form.
Inquiry	Displays the Inquiry form to create an inquiry record when a prospective student inquires about possible enrollment.
Applicant	Displays the Applicant form.
Education	Displays a form used to view and enter the student's education history.
Summary	Displays a form that summarizes the student's activities, documents, entrance tests, addresses, lead date, city, and status. You can get details about each of the summary items.
Tests	Displays a form used to view and maintain the student's entrance tests.
School Fields	Displays a form used to view or enter data in school-defined fields related to the Admissions module and public fields from other modules.
Audit	Displays a form listing changes to selected data entry fields in the student's record.
Status History	Displays a form listing the student's history of school status changes. You can change the student's status from this form.
Deposit	Displays a form on which you can enter an admissions deposit.
Transfer Credits	Displays a form used to review the list of courses transferred from other colleges and modify transfer credit information. This is the same as the Transfer Credits option under the View > Academic Records menu.

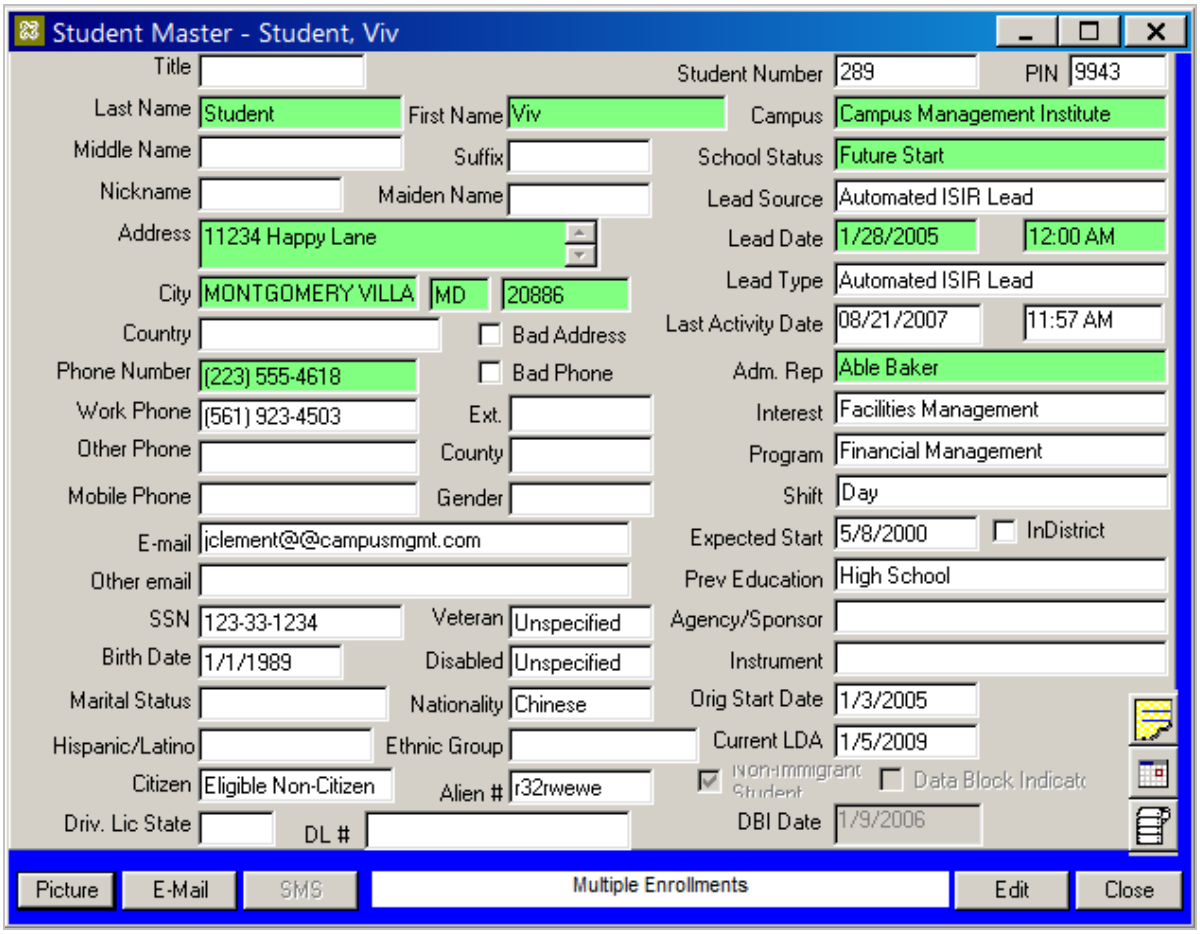
The options on the Student Bar are the same as the options on the View menu, unless the Student Bar has been altered by the user.

Student Master

The Student Master form contains much of a student's basic demographic information. The Student Master form is usually (but not necessarily) populated in the Admissions module by adding a new lead to the database. New leads are entered using the Quick Lead Entry form or the Add New Lead **Ctrl+L** option on the File menu. The **Ctrl+N** key combination can also be used to start a new Student Master record (form) without entering a quick lead.

To view a Student Master form:

1. Select one of the following options:
    - Click **Student** on the Student Bar.
    - Double-click **Recent Students** on the Toolbar. When you change the student in the Recent Students list, a new Student Master form is displayed. If you already have a Student Master form open, it remains open in the background.
    - From the **View** menu navigate as follows:
        - Contact Manager > Student
        - Admissions > Student
        - Financial Aid > Student
        - Student Accounts > Student
        - Academic Records > Student
        - Career Services > Student
        - Loan Management > Student
        - Student Services > Student
        - Housing > Student
    - Use the **Find** menu or click on the Toolbar to search for a student.



Note: The border color around the Student Master form indicates the student's status category. In the setup options under Setup > Status Codes > Colors Tab, your system administrator can choose colors for the status categories.

2. Multiple Student Master forms can be displayed at the same time. The forms always open in the same place in the work area. Unless you have closed, moved, or minimized a previous Student Master form, the next form you open covers the previous form.

   To move between open Student Master forms use the **Window** menu and select **Tile** or **Cascade** to organize all open forms in the work area.

   When you are working with multiple students, ensure that the correct form is current (active). The name of the current student is always shown in the Recent Students text box. The title bar of the active form is always a different color than other forms which may be open in your work area.

3. To edit the information on the form, click **Edit**. See Edit a Student Master.

   Required fields on the form have a background color other than white. If a required field is blank, you must enter data in it when you edit the form, even if you did not intend to provide the information when you clicked Edit.

   Some fields are required by CampusNexus Student (Last Name, First Name, Lead Date, Admissions Rep). Additionally, your institution may designate other fields as required. The system administrator can mark fields as required in either of two ways.

- Open any Student Master (or Quick Lead) form and go to Setup > Required Fields.
- Designate the field as required in the Data Dictionary.

4. To add an activity from the Student Master form, click the **Add Activity** icon at the bottom right of the form. The Activity form is displayed.
5. Click **Close** (Ctrl+F4) to close the active Student Master form. If you are in edit mode when you click Close, you are prompted to save any changes.

Duplicate Student Records

CampusNexus Student checks for duplicate Student Master records when new leads or students are added. The following table columns are used to check for duplicates:

- Student ID
- Social Security Number
- Phone Number
- Date of Birth and Student Name (combined)
- Driver's License Number
- E-mail address.

Each check is performed only if you entered data in the corresponding field. If at least one match is found, a grid showing the matches is displayed

If the lead is a duplicate and can be found on the grid, click the record and the lead form is populated with the information for that lead. The information can then be edited. The campus for the lead can be changed only if the campus ID for the record from the grid is in the list of campuses to which you have access.

Inquiry

Any time a prospective student inquires about possible enrollment, or any time a student or lead record is first created, an inquiry record is created and the information is tracked within CampusNexus Student.

This tracking of inquiry information can be enabled or disabled for each campus under Setup > Campus Locations > Add/Edit Campus > Allow (tab) > Student Inquiries. To track information about multiple inquiries, the 'Track Multiple Lead Inquiries' option must be selected on the Allow (tab). The most recent inquiry record on file is displayed on the Student Master form and in associated reports. Lead inquiries can be tracked by comparison against the Lead Date or the Last Activity Date; the lead inquiry becomes a New Inquiry if its comparison date exceeds the number displayed in the 'New Inquiry if this many days since comparison date' field.

Note: The Inquiry form allows system administrators and users with appropriate permissions to configure field level security via Setup > Field Level Security when the form is active.

Inquiry Record Data Elements and Business Processing

Each inquiry record stores the following data elements:

- Lead Date
- Campus
- Lead Sources
- Response Phone
- Response Time
- Response Date
- Lead Type
- Programs of Interest
- Last Activity Date
- Status
- Admissions Rep and Original Admissions Rep
- Admissions Rep Assignment History
- Contact History Activities

If a student has more than one inquiry record on file, information from the most recent inquiry record is displayed on the Student Master form. The most recent inquiry record is the record with the highest lead date.

You can add a new inquiry record for an existing student and you can edit any existing information on an inquiry record. You can also delete an inquiry record if there is at least one other inquiry record on file for the student. A warning message is displayed if there is any data in other tables related to the inquiry record when attempting to delete that record.

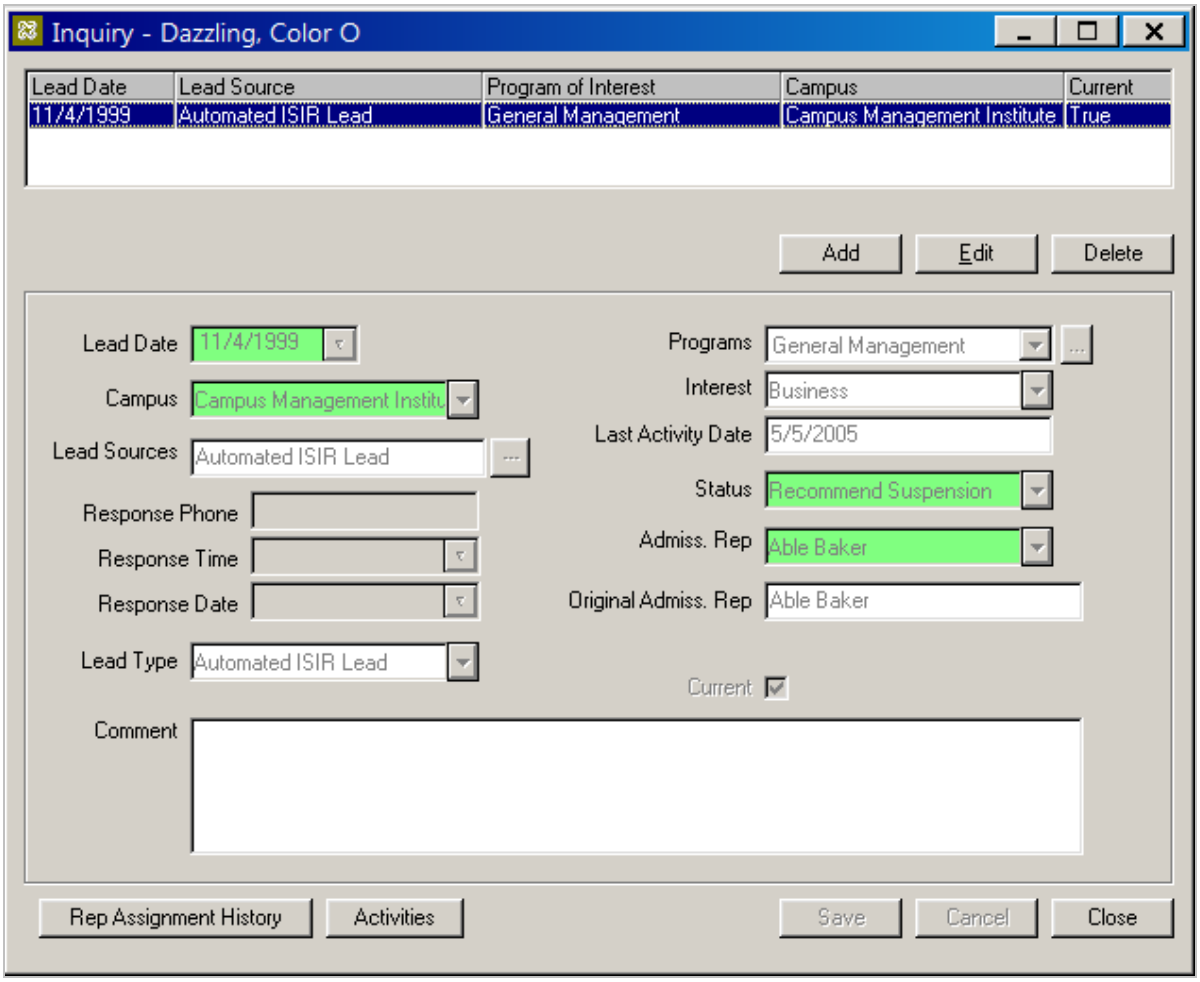
Information for the most recent inquiry can be modified by editing the inquiry information on the Student Master form. The inquiry data on the Student Master record is moved to the inquiry table when a new inquiry record is added for a student and the lead date of the inquiry event added is more recent than the lead date stored on the Student Master record. The inquiry data on the Student Master record is updated with the data from the next most recent inquiry when the most recent inquiry is deleted.

You can assign Contact Manager activities to a specific inquiry record and view Contact Manager activities specific to each inquiry record for a student. Activities that are triggered off a data change on the Student Master record are assigned to the most recent inquiry event.

Logic for Do Not Call uses the lead date from the most recent inquiry event when determining if a prospective student can be contacted.

To view, add, or edit an inquiry:

1. Select a student.
2. Navigate to **View > Admissions > Inquiry**. The Inquiry form is displayed.



3. Click **Add**, or select a record and click **Edit**.
4. In the **Lead Date** field, enter the date of the inquiry.
5. The **Last Activity Date** displays the date when the last change to the inquiry record was made. This date may be different than the Last Activity Date shown on the Student Master form.
6. Select the **Campus** that the student was inquiring about.
7. Select the lead/student's **Status**.

   The system category and system status for applicant processing is *Being Processed*. The school status of *APPREC* is mapped to this system status category. Additional school statuses can be configured and mapped to this status category. You can specify allowable status transitions for any of the Applicant Processing school statuses.

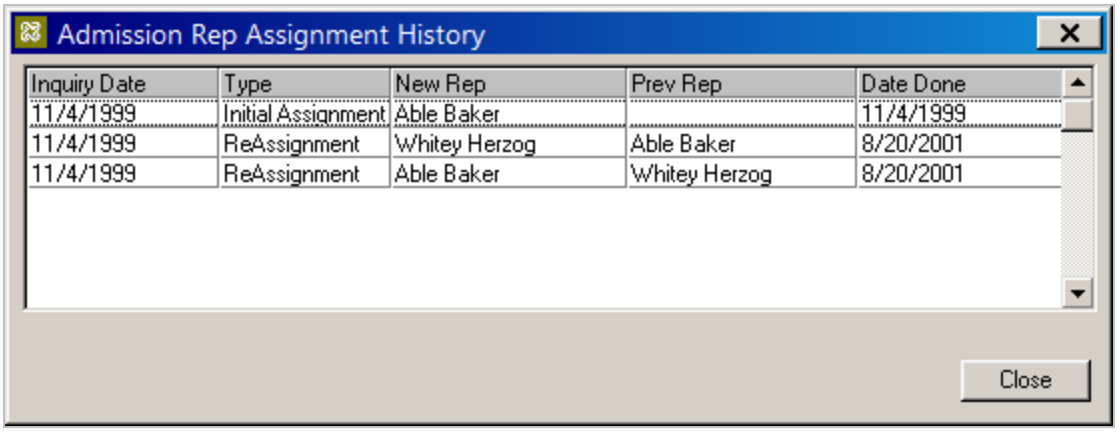
   An applicant's record is converted to an enrollment when a student's school status is changed from a *Being Processed* system status category to an *Attending* system status category.

   You can also configure a list of applicant types. An applicant type can be assigned to each applicant record created.
8. Select the method by which the student heard about your institution from the **Lead Sources** list. If you select a

lead source that has the 'Capture Advertising Information' property selected, the following fields are displayed: Response Number, Response Time, and Response Date. These fields capture additional advertising information for each inquiry, enabling institutions to better analyze their advertising projects.

Note: The Response Number, Response Time, and Response Date fields are displayed on the Student Inquiry form only if *Track Multiple Lead Inquiries* and *Capture Advertising Information*are selected on the Lead Sources Code Setup form (List > Admissions > Lead Sources > Add/Edit Lead Source > Lead Sources Code Setup).

9. Enter the **Response (phone) Number** and select the correct **Response Time** and **Response Date**.
10. Select the admissions representative for the lead/student from the **Admiss. Rep** list.
11. Select the lead type for the lead/student from the **Lead Type** list.
12. The **Original Admiss. Rep** field displays the first admissions representative assigned to the student.
13. Select the programs of study in which the lead/student is or wishes to be enrolled from the **Programs** list.
14. The **Zone** field, if enabled, shows the current zone for this student. Zone is determined by calculating the direct line distance between the ZIP code of each campus and the ZIP code of the student's address.
15. Select the program group in which the lead/student is interested from the **Interest** list.
16. Select the **Current** check box to indicate that the information being displayed is the current inquiry information.
17. Enter any comments in the **Comment** field.
18. Click **Rep Assignment History** to view a form that displays the history of admissions representative assignments for the selected student. Each assignment is shown on a separate line and indicates the type of assignment, the new representative, the former representative, the date done, and the effective date of the reassignment. Click **Close** to close the form.



19. Click **Activities** to view the Contact History form that displays a list of outstanding activities (contacts) related to the student. Click **Close** to close the form.
20. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Applicant

Applicant Record Data Elements and Business Processing

To better track the application process for students, a separate applicant record is created for each student when the student's school status is changed from Lead system status category to a Being Processed system status category. The status is tracked in CampusNexus Student. Contact Manager activities are triggered when the applicant status changes without disturbing the current enrollment data for the student.

You can enter and save enrollment specific data for an applicant record prior to the record becoming an enrollment. The data that can be tracked for an applicant are all enrollment dates (Expected Start Date, Application Received Date, Expected Graduation Date, etc), program version information, and status history.

You can also specify the applicant type for each applicant record created.

Additionally, you can convert an existing applicant record (if one is on file for the student) into an enrollment when running the enrollment wizard.

If the applicant information is converted during the enrollment process and awards have been packaged, the award information should be reviewed and adjusted by an FA officer as needed. There are several processes or user actions that can take place which would change the academic year / loan period dates of the sequences on the student's enrollment and they may no longer match the dates of the awards. Accepting transfer credits and changing the expected start date during the enrollment process are two examples that affect dates of academic years.

You can assign Contact Manager activities to a specific applicant and enrollment record and view Contact Manager activities specific to each applicant and enrollment record for a student. All enrollment-based scheduled activities are evaluated and activities automatically scheduled when pertinent data is changed on an applicant record.

You can assign documents to a specific applicant record and view documents specific to each applicant record for a student. All enrollment-based document schedules are evaluated and correctly auto schedule documents when pertinent data is changed on an applicant record.

You can post status changes and view a status history for each applicant record. If the applicant record converts to an enrollment, the applicant status history becomes part of the enrollments record's status history.

Note: When values for the fields **Program Version**, **Enrollment Status**, and **Expected Start Date** have been entered,CampusNexus Student automatically creates a financial aid academic year for the applicant. This information can be viewed under **View > Financial Aid >** Packaging for the applicant.

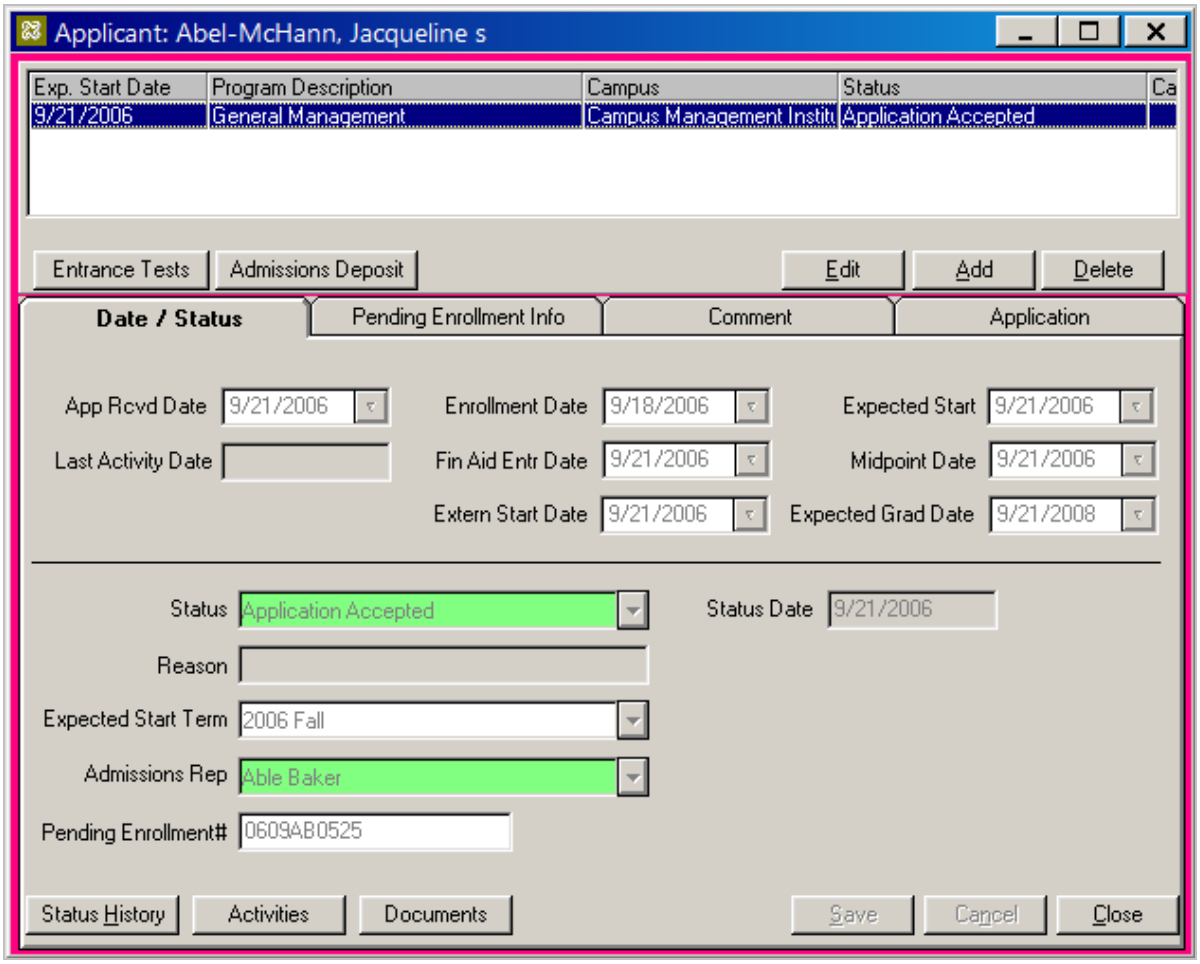
See also Entrance Tests, Admissions Deposit, Status History, Activities, Documents.

To go directly to the tabbed information, click here:

To manage applicant data:

1. Navigate to **View > Admissions > Applicant**. The Applicant form is displayed. It contains the following tabs: Date/Status, Pending Enrollment Info, Comment, and Application.
2. **Date/Status tab**:

   Click **Add**, or select a record and click **Edit**.



3. Complete the fields on this form as needed.

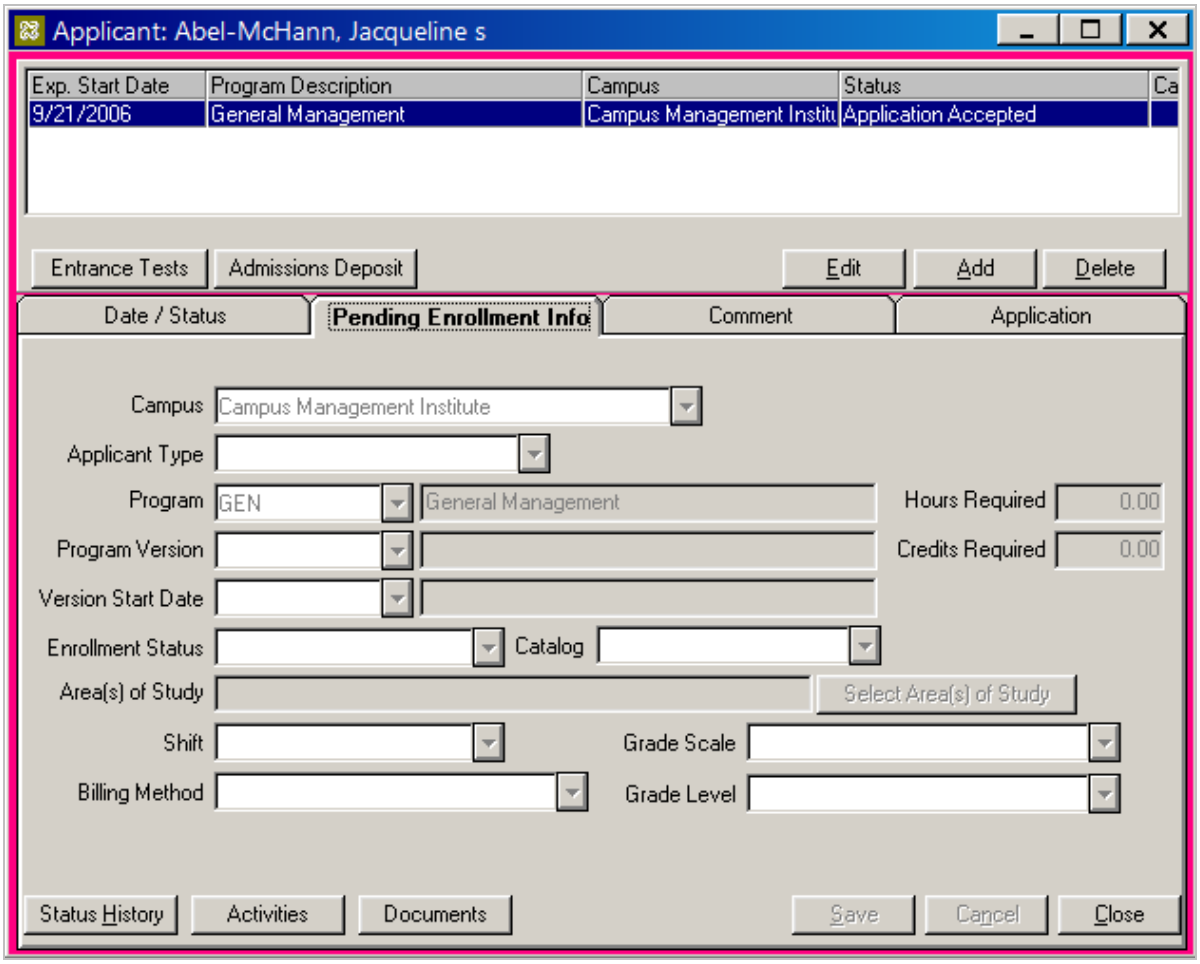
Field Descriptions

Field	Description
App Rcvd Date	Enter or select the date when the application was received.
Enrollment Date	Enter or select the enrollment date for the applicant.
Expected Start	Enter or select the date when the applicant expects to start the next enrollment.
Last Activity Date	This read-only field shows the date when the last activity occurred.
Fin Aid Entr Date	Enter or select the date when financial aid was entered for this applicant.
Midpoint Date	Enter or select the estimated midpoint date for the program version on the listed start date.
Extern Start Date	Enter or select the date when the applicant can begin an externship.
Expected Grad Date	Enter or select the date when the applicant is expected to graduate from the current program.

Field	Description
Status	Select the application status from the drop-down list.
Status Date	The date displayed is the date when the status last changed.
Reason	This read-only field shows the reason text associated with the last status change.
Expected Start Term	Enter or select the term which the applicant is expected to start.
Admissions Rep	Select the admissions representative for this applicant.
Zone	The Zone field, if enabled for this user, shows the current zone for this student. Zone is determined by calculating the direct line distance between the ZIP code of each campus and the ZIP code of the student's address.
Pending Enrollment #	Each application is assigned a unique Pending Enrollment number that is displayed in this field.

4. Click **Save**.
5. **Pending Enrollment Info tab**:

   Use the Pending Enrollment Info tab to record information about the applicant's pending enrollment. This information is updated automatically when the applicant is converted to an enrolled status.



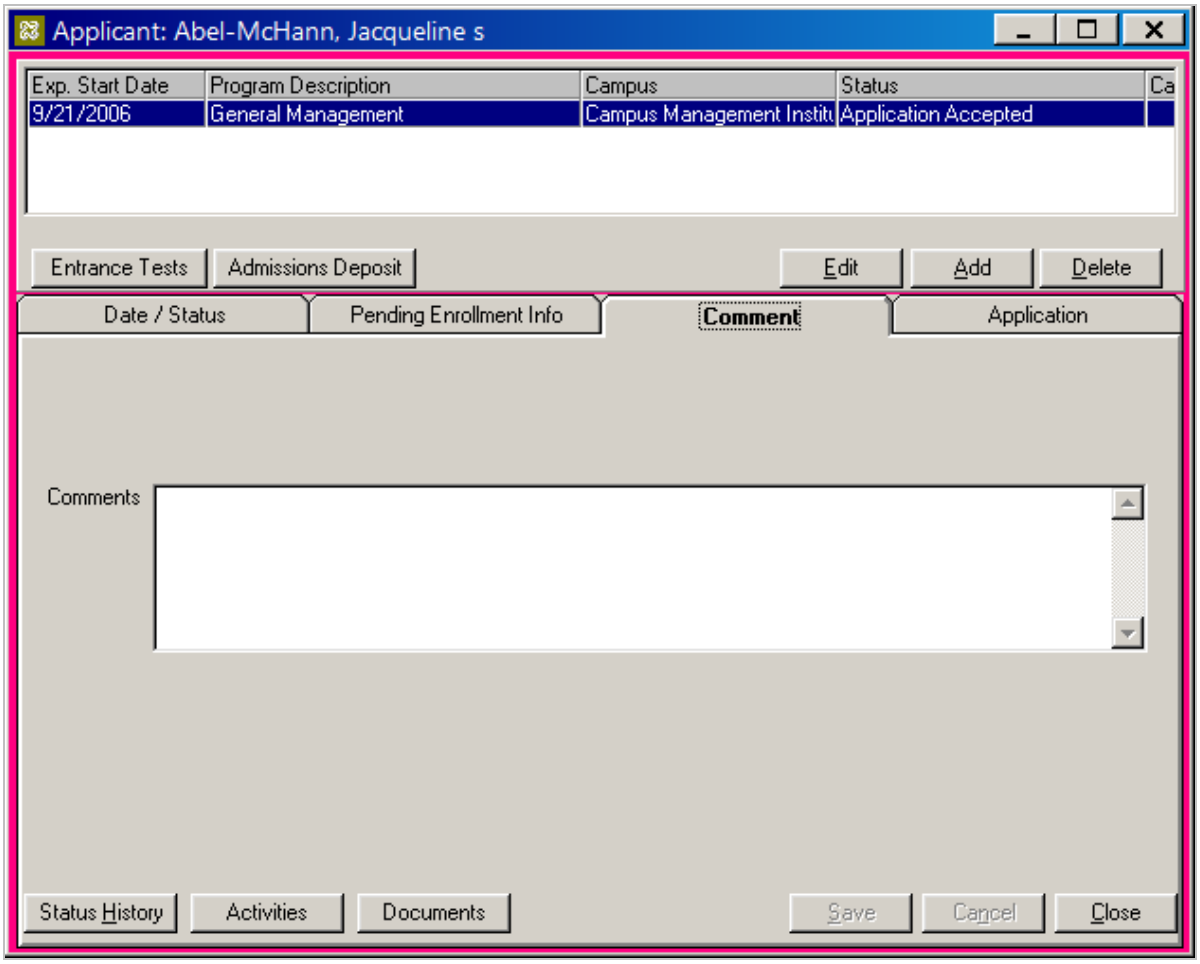
6. Complete the fields on this form as needed.

Field Descriptions

Field	Description
Campus	The current campus assigned to the applicant is displayed in this field.
Applicant Type	Select an Applicant Type from the drop-down list of applicant types. **Note**: If you select the same Applicant Type in the Applicant Type list on which the Schedule Documents activity is created, all the documents (which are added to the Schedule Documents at the time of creation of Document Scheduler) are assigned to the applicant. Additionally, the activity can be triggered when the desired Applicant Type (in the Pending Enrollment Info tab) is assigned to the applicant. On Date/Status tab, you can also schedule the activity for this Status. If two different activities are scheduled for these two lists, and both of them have some common documents in it, CampusNexus Student first checks if the same document is attached to the student. If this document is already attached, there is no need to add the same document again; if the document is not assigned to the student, the document will be assigned to the student.

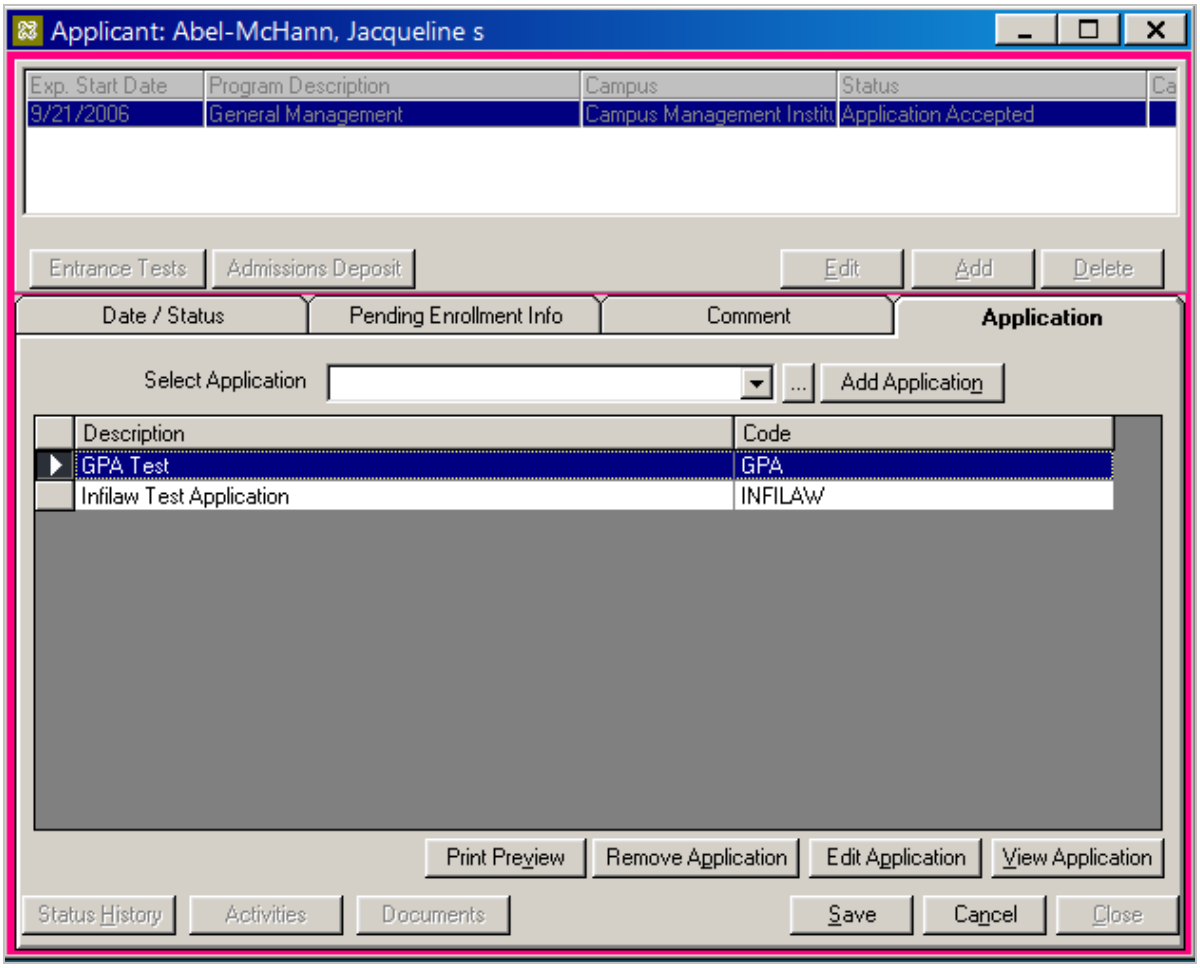
Field	Description
Program	If the applicant's program is known, it can be entered or selected here.
Program Version	If the applicant's program version is known, it can be entered or selected here.
Hours Required	This read-only field shows the hours required when the program is selected.
Credits Required	This read-only field shows the credits required when the program version is selected.
Version Start Date	The program version start date presented in the Version Start Date list represents the student's enrollment program version start date for the student's enrollment campus.
Enrollment Status	Select the enrollment status from the list.
Catalog	Select the catalog from the list.
Shift	Select the shift (Day, Night, or Weekend).
Grade Scale	The grade scale can be entered or selected here.
Billing Method	The billing method can be entered or selected here.
Grade Level	The grade level can be entered or selected here.

7. Click **Save**.
8. **Comment tab**:



9. Enter any comments in the **Comment** field.
10. Click **Save**.
11. **Application tab**:

    Select the student's Program Version and click **Edit** in the top portion of the screen. The available applications are enabled.



12. Select an application and click **Edit Application**. See Admissions Application for application setup instructions.
13. Fill out the student's application and click **Submit**.
14. A confirmation message is displayed. Click **OK**. The Application Status field now contains a Complete value.
15. Click **View Application** to view the applicant's responses to the application at any time.
16. Click **Print Preview** to view the Student Application in the Report Viewer.
17. Click **Remove Application** to remove an application.
18. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Education

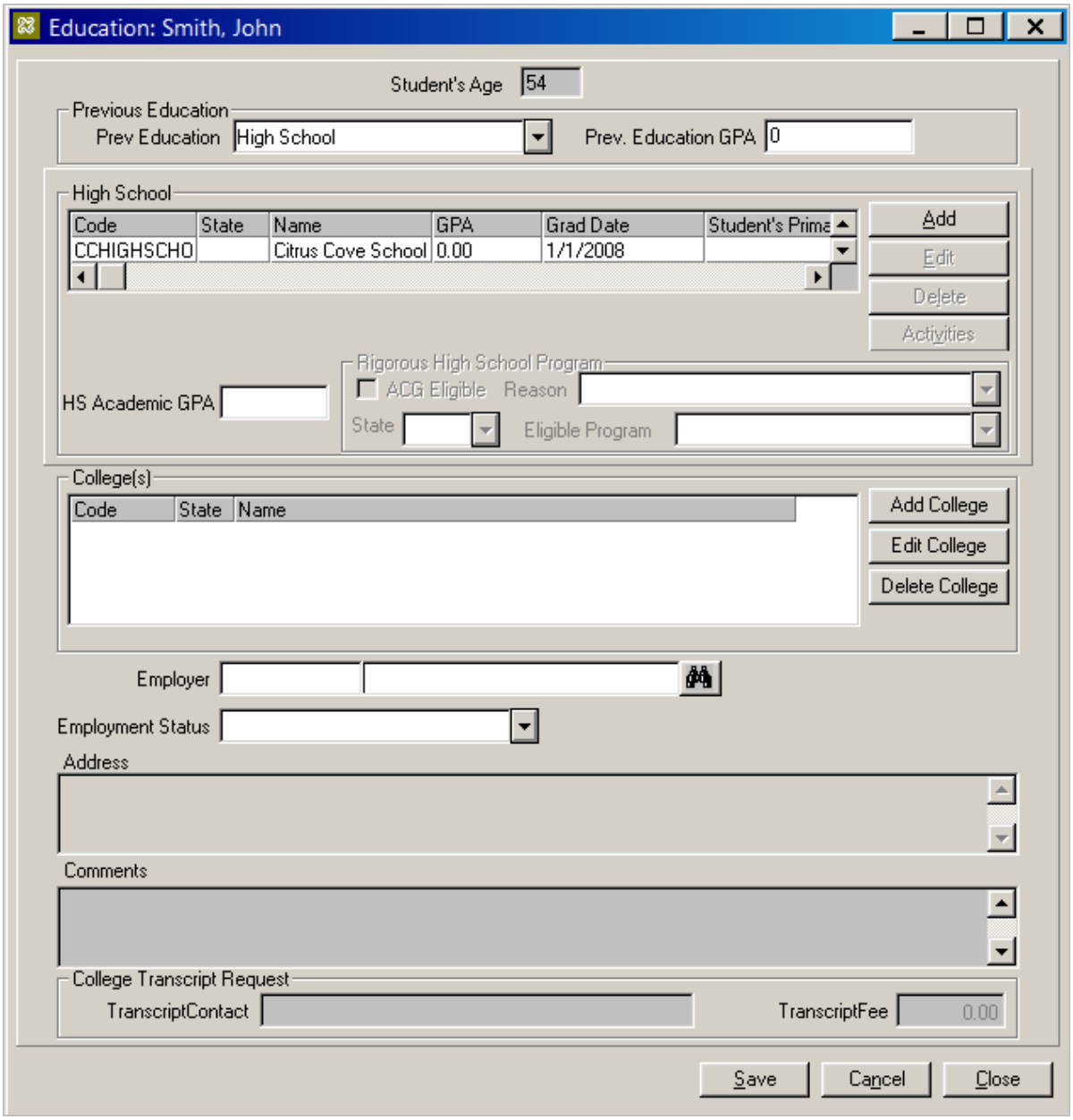
Use the Education form to record data related to the student's education and employment history.

Note: The system administrator must set up security rights for staff members to use the Add College, Edit College, and/or Delete College button on this form.

To set up the permissions as administrator, navigate to **Setup > Security**, select a Staff Group within the Manage Group Access form, click **View**, scroll down to the Admissions section and locate the security settings in the Education row. Within the Education row, select Edit, Add, and/or Delete allow a staff group access.

To edit the student's Education form:

1. Select a student.
2. Navigate to **View > Admissions** > **Education**. The Education form is displayed.



3. Select the student's previous education from the **Prev Education** list.

   In addition to the other configured options for Previous Education (e.g., College Graduate, Doctorate, GED, High School, Masters Degree, Some College), you also need to enter and save *Ability to Benefit* (ATB) information, which must be transmitted to COD for students admitted based on their ability to benefit.

   When Ability to Benefit is selected from the Prev Education list, the High School panel of the Education form is replaced by the Ability To Benefit panel. Here, you can enter the following information as called for in the COD requirements:

Field Descriptions

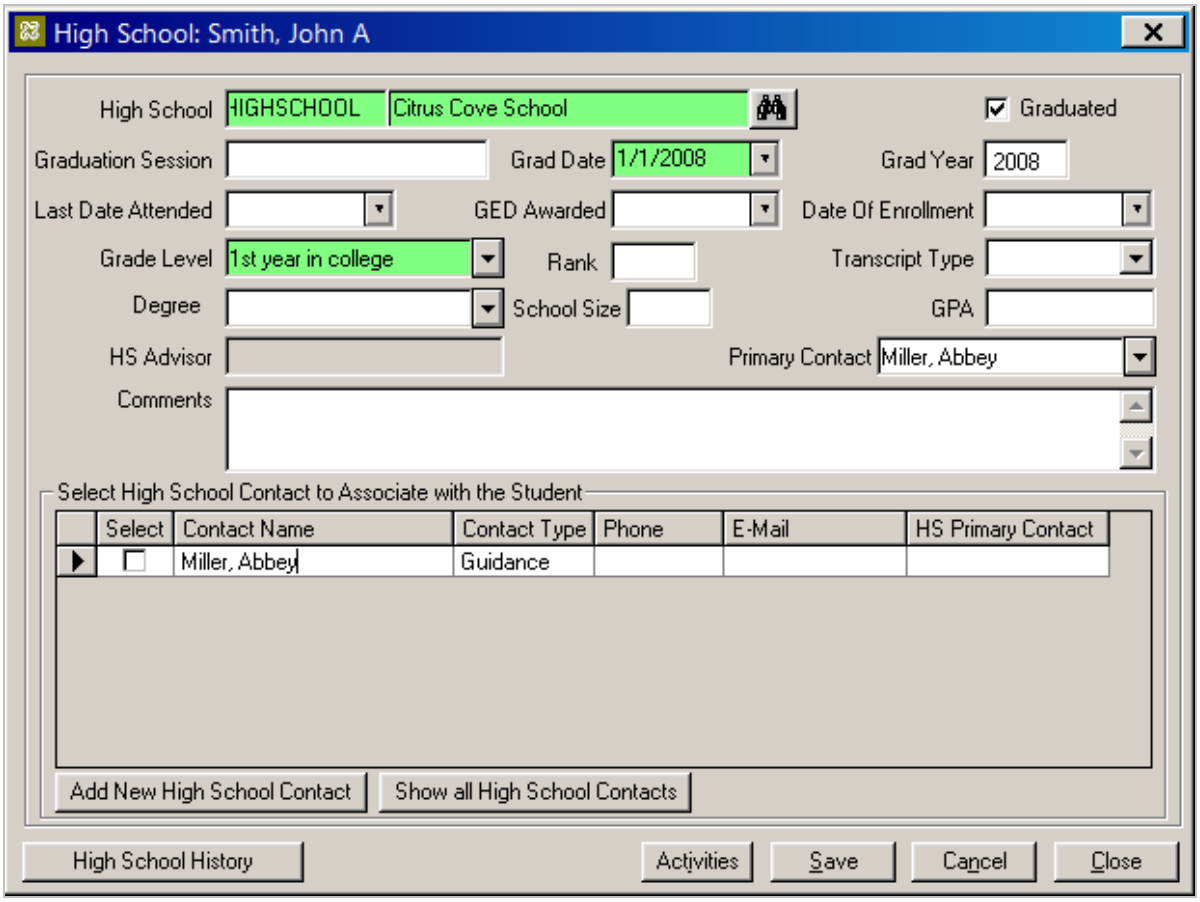
Field	Code	Description	Valid Completion Date
Tests Administered	01	ASSET Program> Basic Skills Test	November 1, 2002 to October 31, 2015
	02	Career Program Assessment (CPAt) Basic Skills Subtests	November 1, 2002 to June 30, 2015
	03	Combined English Language Skills Assessment (CELSA)	November 1, 2002 to Present
	04	Compass Subtests (COMPASS)	November 1, 2002 to October 31, 2015
	05	Computerized Placement Tests (CPTs) / ACCUPLACER	November 1, 2002 to Present
	06	Descriptive Tests: Language Skills and Mathematical	November 1, 2002 to April 27, 2007
	07	ESL Placement Test (COMPASS/ESL)	May 19, 2006 to October 31, 2015
	08	Wonderlic Basic Skills Test (WBST)	November 1, 2002 to Present
	09	WorkKeys Program	March 11, 2005 to June 30, 2015
	10	Test of Adult Basic Education (TABE)	November 1, 2002 to May 11, 2004
	11	Spanish Assessment of Basic Education (SABE)	November 1, 2002 to October 31, 2015
	12	Wonderlic Basic Skills Test - Spanish	July 1, 2015 to Present
Test Administrator	01	Testing Center	
	02	Test Administrator	
Date Completed		Select Date from menu	
State Code			

Validation checks are performed on the Ability To Benefit fields before changes are saved to the database. To remove a previously saved ATB record for a student, you must first select [BLANK] for the Ability To Benefit Code and then click **Save** to have the entire ATB record removed from the database.

Important: ATB codes 3 and 5 are no longer valid, and you will only see these codes if the student had been configured with them previously. If you try to submit a student for COD processing with previously configured ATB codes of 3 or 5, an exception is generated.

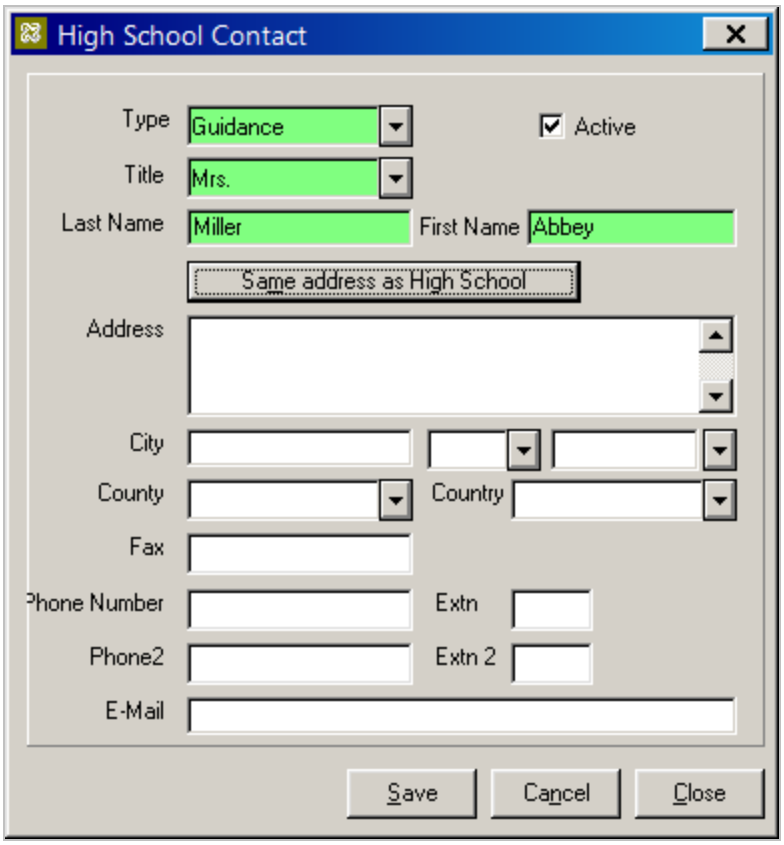
4. Enter the student's grade point average in the **Prev. Education GPA** field.
5. To add or update a high school for a student, click **Add**, or select a record and click **Edit**. The High School form is

displayed.



6. Click to find a high school.
7. Select **Graduated** to indicate that the student graduated. A GED does not qualify as graduation, so the box would be cleared in that case.
8. In the **Graduation Session** field, enter the name of the session when the student graduated, such as Spring, Fall, and so on.
9. In the **Grad Date** field, enter or select the date the student graduated from high school.
10. Press the **Tab** key to automatically fill in the **Grad Year** field based on the graduation date. Or, if the graduation date is unknown, enter or select the year the student graduated in the Grad Year field.
11. In the **Last Date Attended** field, enter or select the date when the student last attended school.
12. In the **GED Awarded** field, enter or select the date when the student received the GED.
13. In the **Date of Enrollment** field, enter or select the date of the student's enrollment.
14. Select the **Grade Level** the student has achieved so far.
15. In the **Rank** field, enter the number of the student's graduating rank.
16. Select the **Transcript Type**. The options are **Unofficial**, **Partial**, or **Official/Final**.
17. Select the student's **Degree**.

18. In the **School Size** field, enter the total number of graduates in the student's class.
19. Enter the student's **GPA**.
20. The **HS Advisor** field is a read-only field.
21. Select a **Primary Contact**.
22. Click **Add New High School Contact**. The High School Contact form is displayed.

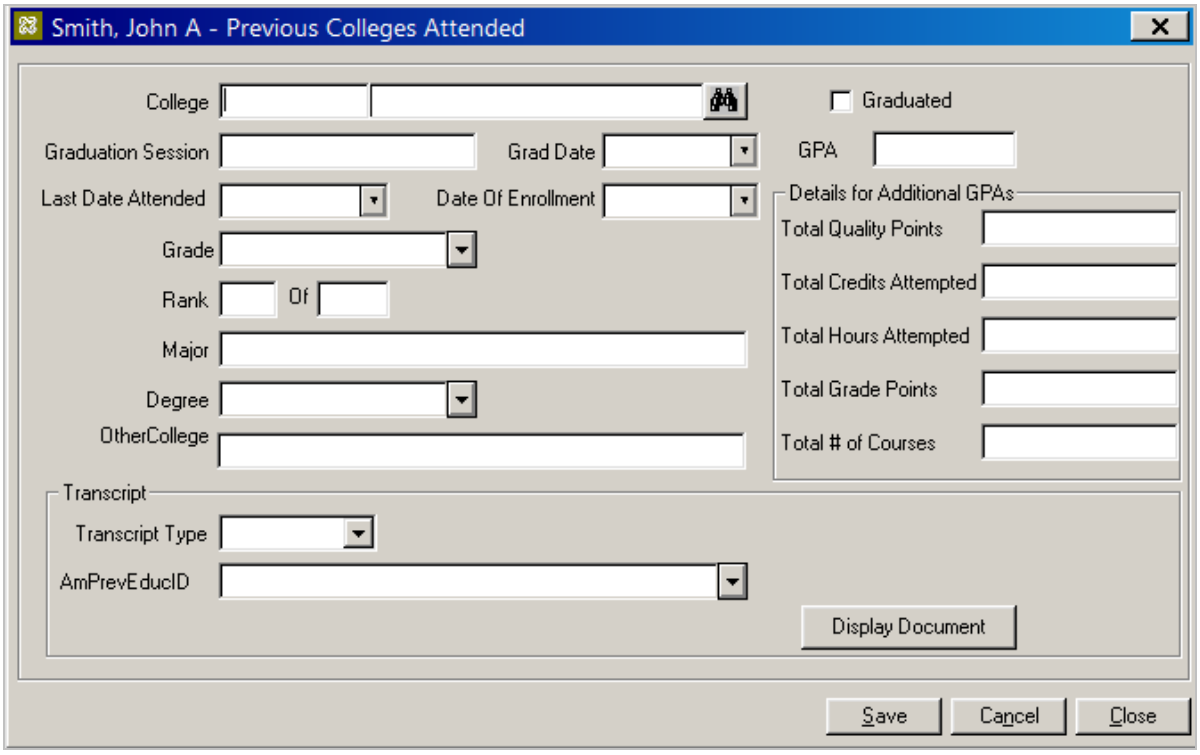


23. Add at least one contact. Specify the **Type**, **Title**, **Last Name**, and **First Name**. If the contact's address is the same as the high school, click **Same Address as High School** to copy the high school address on file to the appropriate fields.

    Note: To change information about an existing High School Contact, navigate to **Daily > Admissions > High Schools**.
24. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. You are returned to the High School form.
25. To view existing or add new high school activities, by select a high school record and click **Activities**.
26. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. You are returned to the Education form.
27. The **HS Academic GPA** field is used exclusively for HOPE eligibility and awarding purposes.
28. The **Rigorous High School Program** section is disabled unless the student applies for an ACG grant. See also

Awards and Packaging.

29. Click **Add College** to add the student's previously attended college. Select a college from the list and click **Edit College** to modify an existing previous college attended. The Previous Colleges Attended form is displayed.

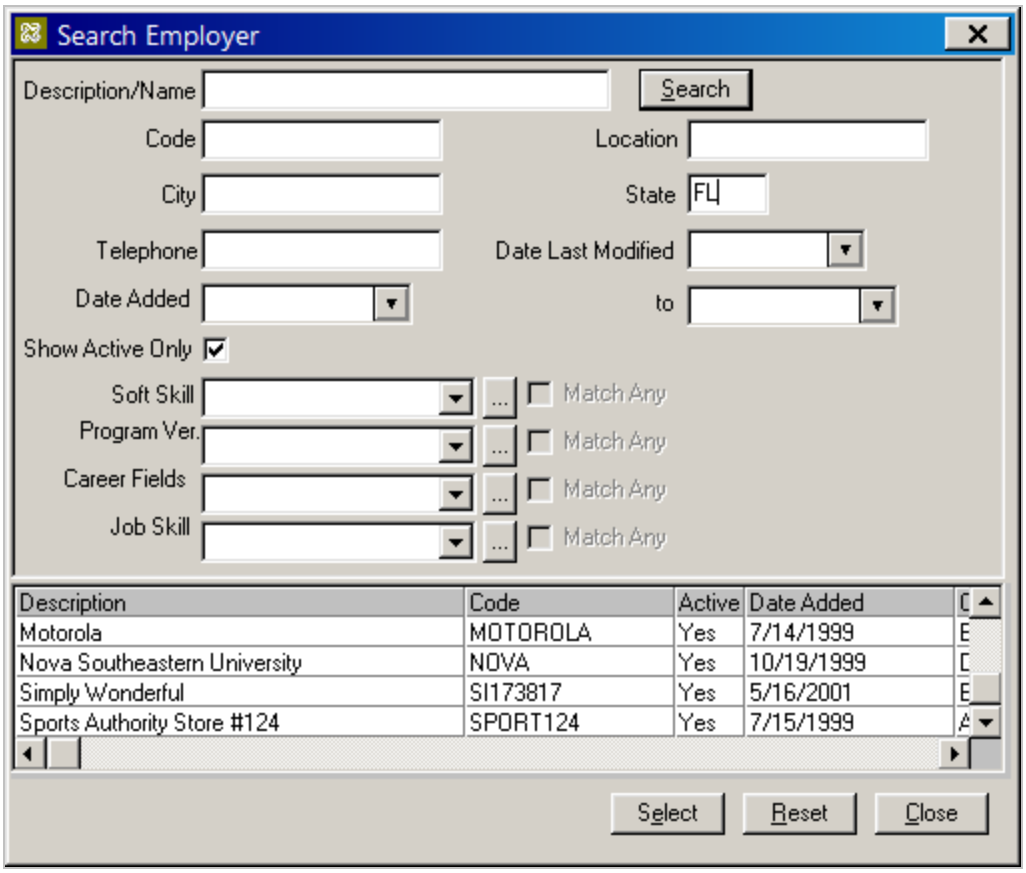


30. The Previous Colleges Attended form includes a **Details for Additional GPAs** area.
    - If you are calculating weighted GPAs, enter a sum **Total of Quality Points** a student earned at the previous college.
    - If you are calculating unweighted GPAs, enter the number of **Total Grade Points** the student has on the previous college transcript.
31. Enter the **Total Credits Attempted** from the student's unofficial or official transcript.
32. Enter the **Total Hours Attempted** from the student's unofficial or official transcript.
33. Enter the **Total Grade Points** and the **Total # of Courses** from the student's transcript.
34. Select a document and click **Display Document**. If no attachment has been stored for this document, the following message is displayed: *"No attachment found for this document."* Otherwise, the name of the document is displayed.

    Note: This function works with and without ImageNow. If your institution has the necessary technology to scan or otherwise import images of student documents, you can load or scan them into the CampusNexus Student database. The document can be in any file format that can be processed by an application on your computer.
35. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. You are returned to the Education form.
36. To remove a college, select a college record and click **Delete College**. A confirmation message is displayed. Click

Yes. CampusNexus Student checks if transfer credits exist for this college. If transfer credits are found for the selected college, the college will not be deleted.

37. Click to find the employer. The Search Employer form is displayed.



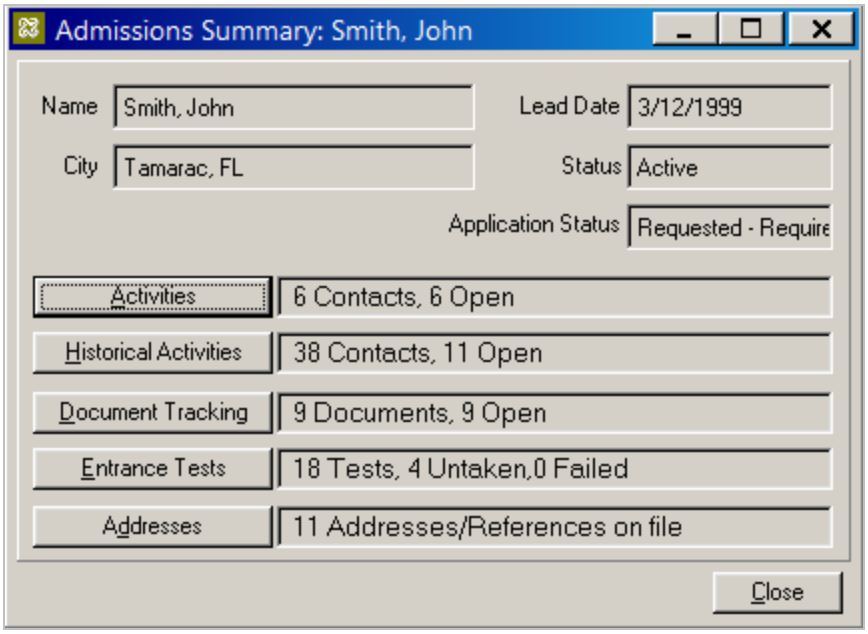
38. Enter any combination of search criteria and click **Search**. Select the student's employer from the search results. The employer's address and any associated comments appear in the **Comments** and **Address** fields on the Education form and the Search form is closed.
39. Select an **Employment Status**. The options are Full Time, Part Time, and Unemployed.
40. If a transcript request has been made, the **Transcript Contact** and **Transcript Fee** are displayed.
41. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Admissions Summary

The Admissions Summary form summarizes significant information about the selected lead (student). It displays statistics for activities, historical activities, document tracking, entrance tests, and addresses.

To view the admissions summary:

1. Select a student.
2. Navigate to **View >Admissions** > **Summary**. The Admissions Summary form appears. It displays the student's current application status. If more than one application is in Document Tracking, the status is displayed for the most recently added record.



3. Click **Activities** to view or edit the Current ab of the Contact History form.
4. Click **Historical Activities** to view the Historical tab of the Contact History form.
5. Click **Document Tracking** to view or edit the Document Tracking form.
6. Click **Entrance Tests** to view or edit the Entrance Tests form.
7. Click **Addresses** to view or edit the Addresses form.
8. Click **Close** to close the form.

Entrance Tests

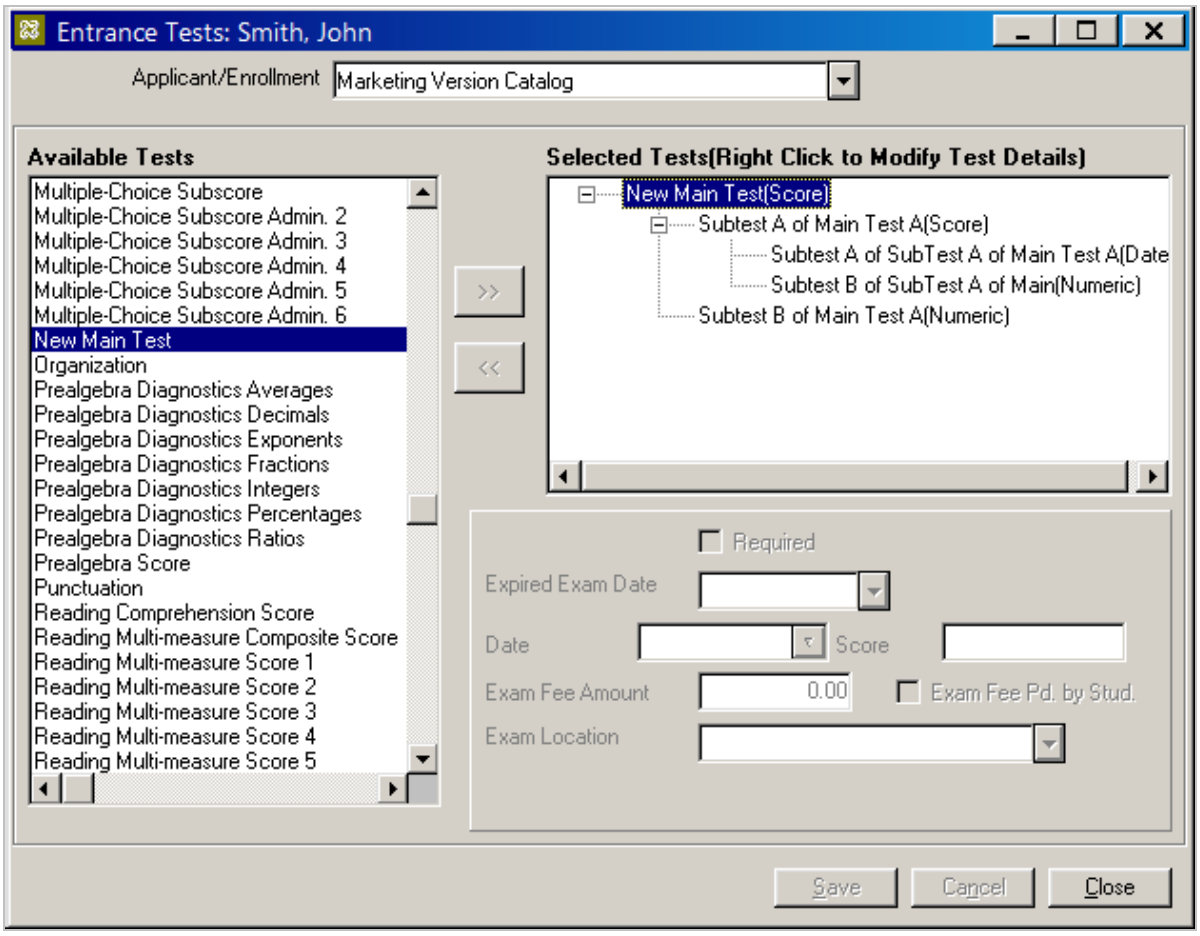
Some institutions require entrance tests that a student must take to gain entry into certain classes. A minimum score is usually established for the test and a remedial course assigned to the student's schedule if the student does not meet the criteria.

Some tests may appear on the Entrance Tests form as a result of your institution's enrollment policies. The list of tests that can appear is set up by the system administrator. You can add tests to the student's list, and edit or remove those that are already on the list. See also test setup, and program, program version, and agency and third party entrance test setup.

To add or edit an entrance tests associated with a student's record:

1. Select a student.
2. Navigate to **View** > **Admissions** > **Tests**. The Entrance Tests form for the selected student is displayed.

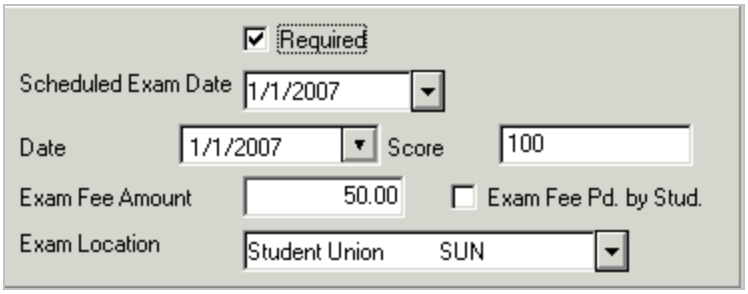
   Note: When an ACT test score is populated for the student, CampusNexus Student displays the equivalent SAT score of ACT score. This field is visible only when an ACT test is selected.



3. Select an **Enrollment** at the top of the form.
4. Select a test/field from the list of **Available Tests**. Click to move it to the **Selected Tests** field.

   Repeat this step until all required tests are selected.

5. To remove a test/field from the list, select it in the **Selected Tests** field, and click << to move it back to **Available Tests** field.
6. To edit a test/field, select the test/field, **right-click** in the **Selected Tests** field, and click **Edit**. The test detail fields below the Selected Tests field are enabled.



   a. Select **Required** if the test is required.
   b. In the **Scheduled Exam Date** field, specify the date when the exam was originally scheduled.
   c. In the **Date** field, specify the date when the student took the exam.
   d. In the **Exam Fee Amount** field, specify the amount of the fee to be paid by the student for the exam.
   e. Select **Exam Fee Paid by Student** if the fee was received.
   f. In the **Exam Location** field, select the location where the student takes the exam.
7. When you select a sub-test, **right-click** in the **Selected Tests** field, and click **Edit**, the panel below the Selected Tests field displays the following fields:
   - For a sub-test with a *Score* data type, the **Score** field is displayed.
   - For a sub-test with a *Numeric* data type, the **Value** field is displayed.
   - For a sub-test with a *Date* data type, the **Date Value** field is displayed.
   - For a sub-test with a *Text* data type, the **Text** field is displayed.

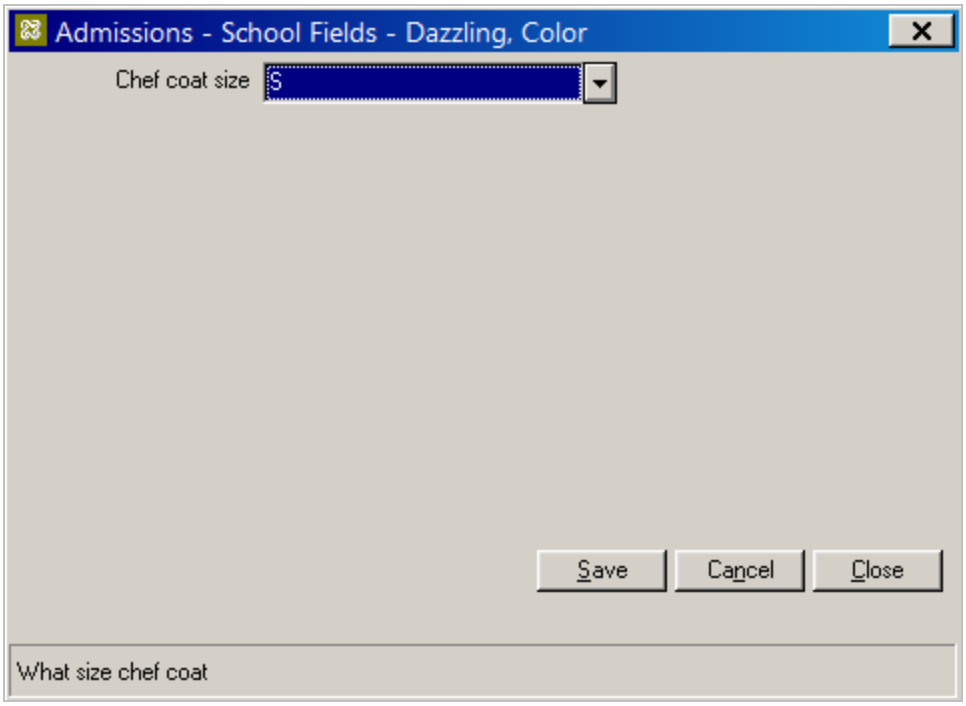
   Complete the fields on this form as needed.
8. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

School Fields

School-Defined Fields are set up by your system administrator to collect information that is not required by the generic CampusNexus Student application. (See Setup > School Defined Fields.) The fields are organized by department during setup. At least one department has the authority to change each field. Some fields may be viewed but not edited in your department. A field may be flagged as confidential by the originator, i.e., not viewable outside of the department that is using it. For instance, if a field can only be viewed or edited by the Admissions Department, it will only be visible when the form is opened from View > Admissions > School Fields. If you do not have access to that menu option, you will not see this field.

To view or edit school fields:

1. Navigate to **View** > **Admissions** > **School Fields**. The Admissions - School Fields form is displayed.



2. Click on or tab to a field that you want to change. Select an option or enter data to edit the field.

   The fields are displayed in edit mode (white background) if your department has been given permission to change the data. Fields that are "dimmed" cannot be changed. Fields that are listed but are gray and show no data are simply not be filled in yet by the staff member responsible for doing so.

3. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Audit

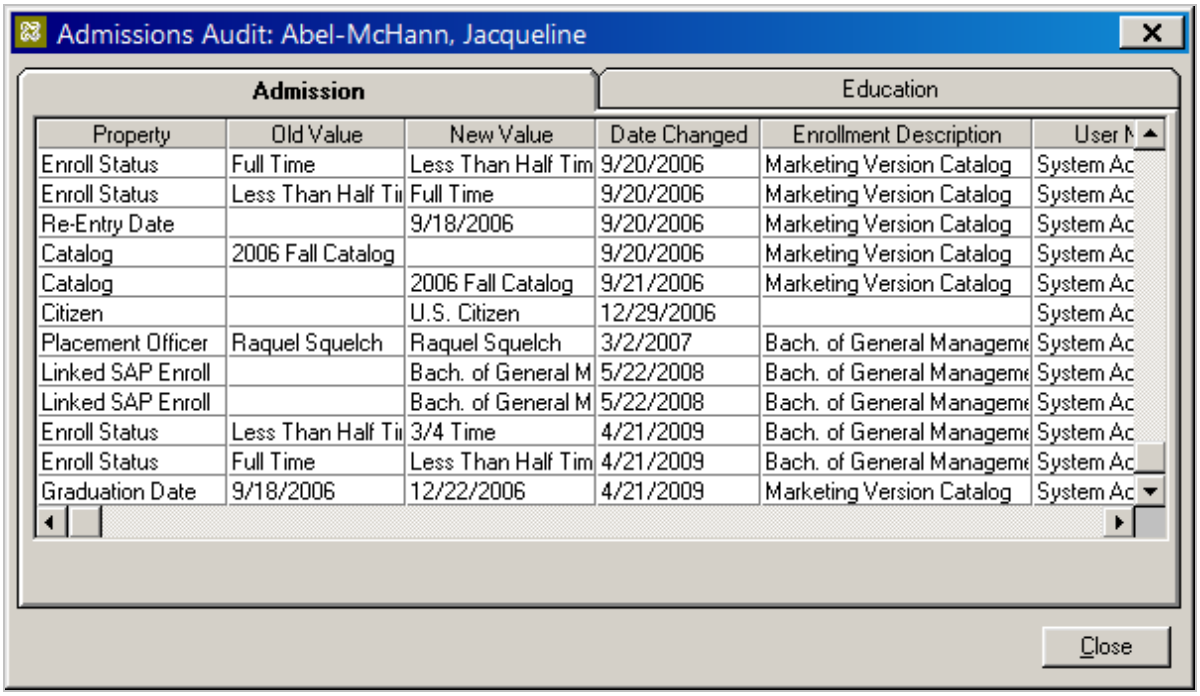
The Admissions Audit form displays a read-only list of changes to significant student record fields in the CampusNexus Student database.

Changes to the Student Number on the Student Master are recorded here. In addition, changes to 'Ethnic Group' categories associated with a student are also captured.

Note: 'Hispanic/Latino' information for a student is only audited when there is a change. An insertion or deletion of 'Hispanic/Latino' information is not audited.

To view the admissions audit for a student:

1. Select a student.
2. Navigate to **View > Admissions > Audit**. The selected student's Admissions Audit form is displayed containing a list of changes to Admission and Education information.



Note: A row is automatically added to the Admissions Audit for transfer enrollments that existed prior to implementing the Link SAP Enrollments enhancement. These record types are easily identified by the User Name *? System* and the Comment *Initial data population for SAP enrollment linking.*

3. Click **Close** to close the form.

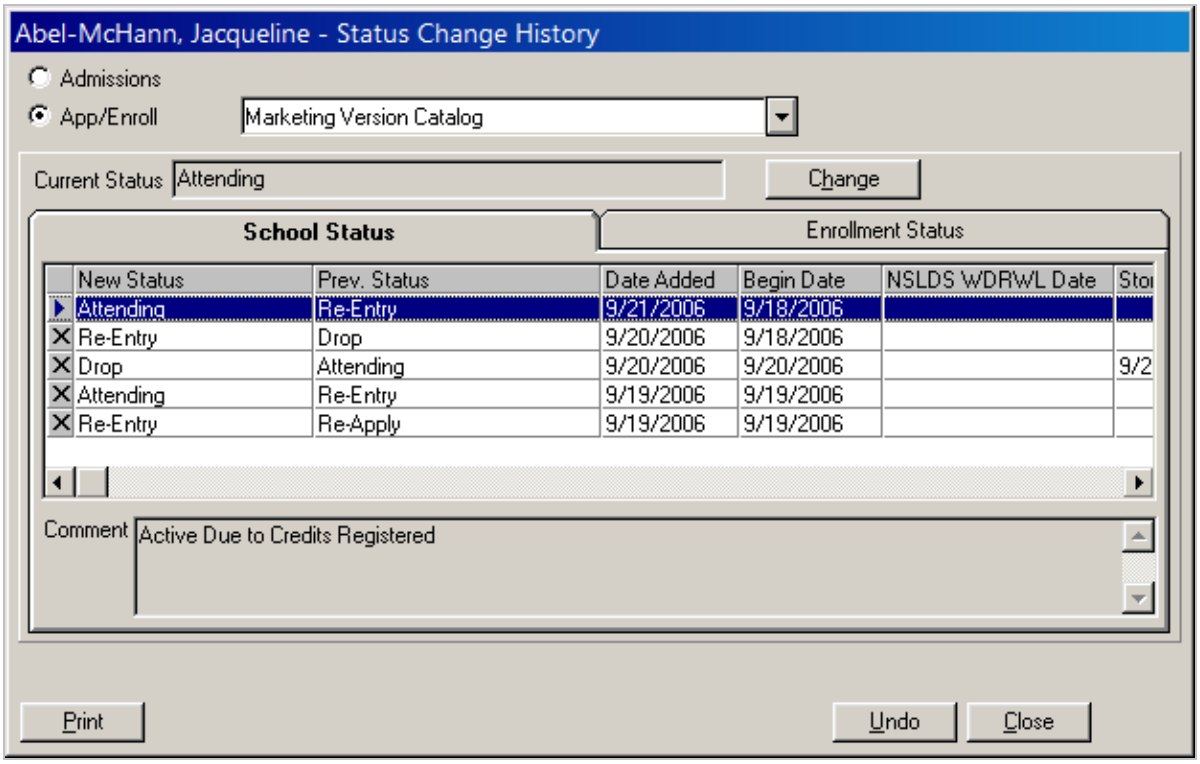
Status History

The Status History function provides a means of auditing changes in the student's status as the student progresses through the various phases of lead, active student, graduate, etc. Given the proper system permissions, you can view and print the history of status changes, make status changes, and even reverse a status change.

When a student's school status is changed to a "Never Attended" status category type (e.g., Cancel; No Show) and courses are removed from the student's schedule, Grade Audit and Course Status Change Audit records will be created.

To view or edit the status history for a student:

1. Select a student.
2. Navigate to **View > Admissions > Status History**. The Status Change History form is displayed listing all status changes for the selected student.



3. Select the **Admissions** or **App/Enroll** (Application/Enrollment) filter option. The Admissions option allows viewing only (Change button is disabled). The App/Enroll option allows viewing and editing (Change button is enabled). If you select the App/Enroll option, select an enrollment from the drop-down list.
4. The **School Status** tab displays the student's school-defined status changes. The **Enrollment Status** tab displays the student's enrollment status changes. Both tabs use columns defined as follows:

Status Column

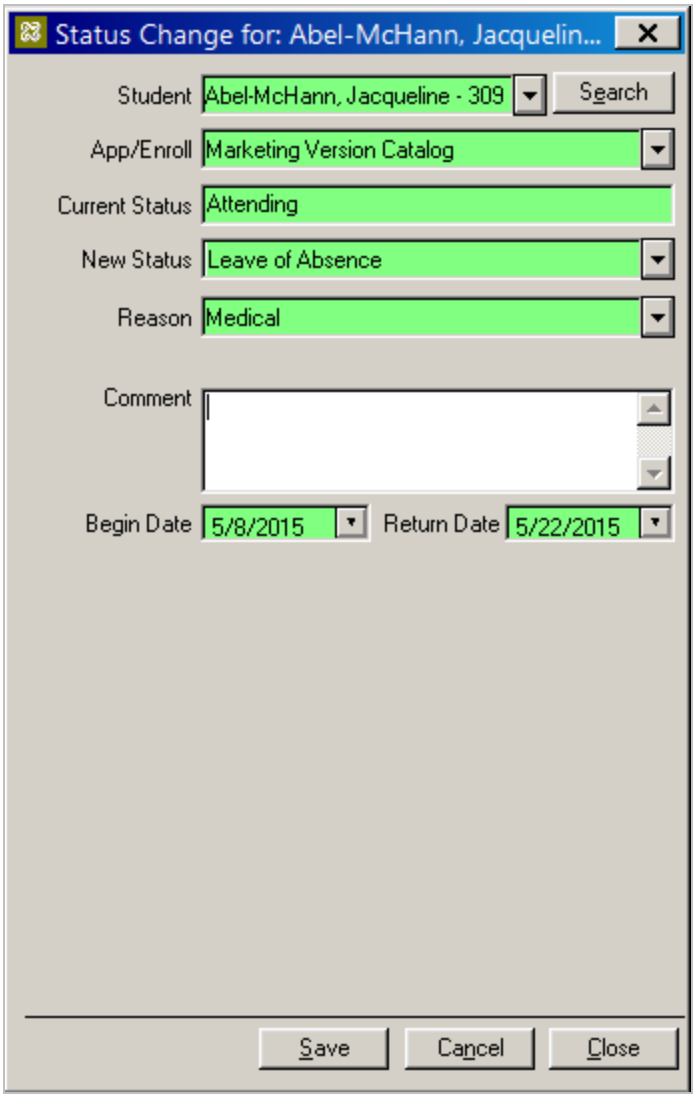
Column	Description
New Status	Status after the status change

Column	Description
Prev. Status	Status before the status change
Date Added	Date when the status change was entered
Begin Date	Date the status change becomes effective
Stored LDA	Last Date of Attendance
System User	Login ID of the person who made the status change
Reason	Reason why a student's status was changed
NSLDS WDRWL Date (School Status tab only)	Date reported as the effective date when a student withdrew from school in SSCR and Clearinghouse Reporting

Click each column heading to sort the data in a column. By default the latest change is displayed on top.

5. To change a status, click **Change**. The Status Change form for the selected student is displayed.

   Note: Changes can only be made if the App/Enroll option is selected. You cannot change Admissions statuses once the student is enrolled. CampusNexus Student allows only one status record for a date. If there is already a status record for a date, you must update the status rather than writing a new record.



6. Confirm the values in the **Student ID**, **App/Enroll**, and **Current Status** fields. Correct them if necessary.

   Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

7. Select the **New Status**. See Notes on Status Changes for further details.

8. Select a **Reason** if the Reason field is enabled for the new status.

   When you select a new status, CampusNexus Student checks if at least one row exists in the Reason table where the School Status ID equals the new status, and the Campus Group ID contains the campus in which the student is enrolled. If at least one row is found in the Reason table, the Reason field on the form is changed to the color that identifies required fields. The status update will not proceed when you click Save if the Reason field is left blank. If no rows are found in the Reason table, the Reason field remains disabled.

9. Enter any comments in the **Comment** field.

10. If a Drop Status was entered, additional fields are displayed. The **Withdrawal** Official/Unofficial check box must

have a selection and the **Date of Determination**, **LDA**, and **NSLDS WDRWL Date** fields must be filled in.

For information on how these dates are calculated and on how course status changes are determined when a student is dropped, see Notes on Status Changes.

11. Depending on the type of status change, the **Effective Date** field (also known as Begin Date) will be available. The default for this field is the current date.
12. Click **Save**.
13. To undo a status change, select the most recent change and click **Undo**. You cannot undo previous statuses. A confirmation message is displayed. Click **Yes**. The student is returned to the previous status.

    If you are canceling a student enrollment when the enrollment has courses associated with it, a message appears asking if you want to delete course associations for this student. If you answer **Yes**, the course associations and enrollment for this student are deleted. If you answer **No**, the course associations are not deleted and the student's enrollment is not cancelled.
14. Click **Print** to print a Status Change History Report.
15. Click **Close** to close the form.

Deposit

Accounting for deposits is maintained separately from other monetary transactions in CampusNexus Student. For example, in some institutions the Admissions department, rather than the Accounting department, is responsible for collecting deposits from leads that are submitting applications for enrollment.

Deposits do not appear on the ledger card until they are posted in the Student Accounts department. The menu option Daily > Student Accounts provides a form to post deposits to the student's ledger card. The menu option Reports > Admissions provides an Admissions Deposits report.

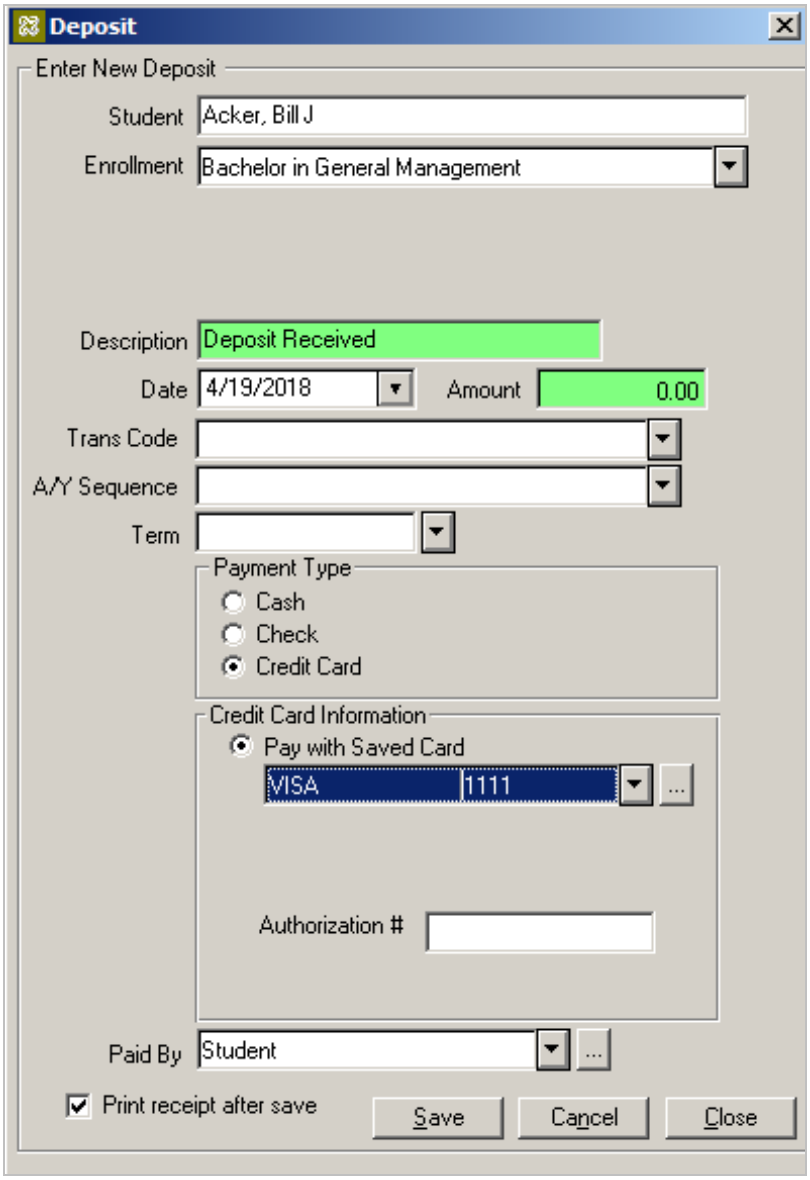
The Deposits Posting flag under Setup > Student Accounts > General tab determines the permissions to post deposits:

- If the flag is set to "Any Campus", you can post deposits for a student at any campus.
- If the flag is set to "Current Campus", you can only post deposits for a student at the "Current Campus". If you try to post deposit transactions for students at another campus, a message indicates that you are not signed into the campus and posting is not allowed.

To post a deposit:

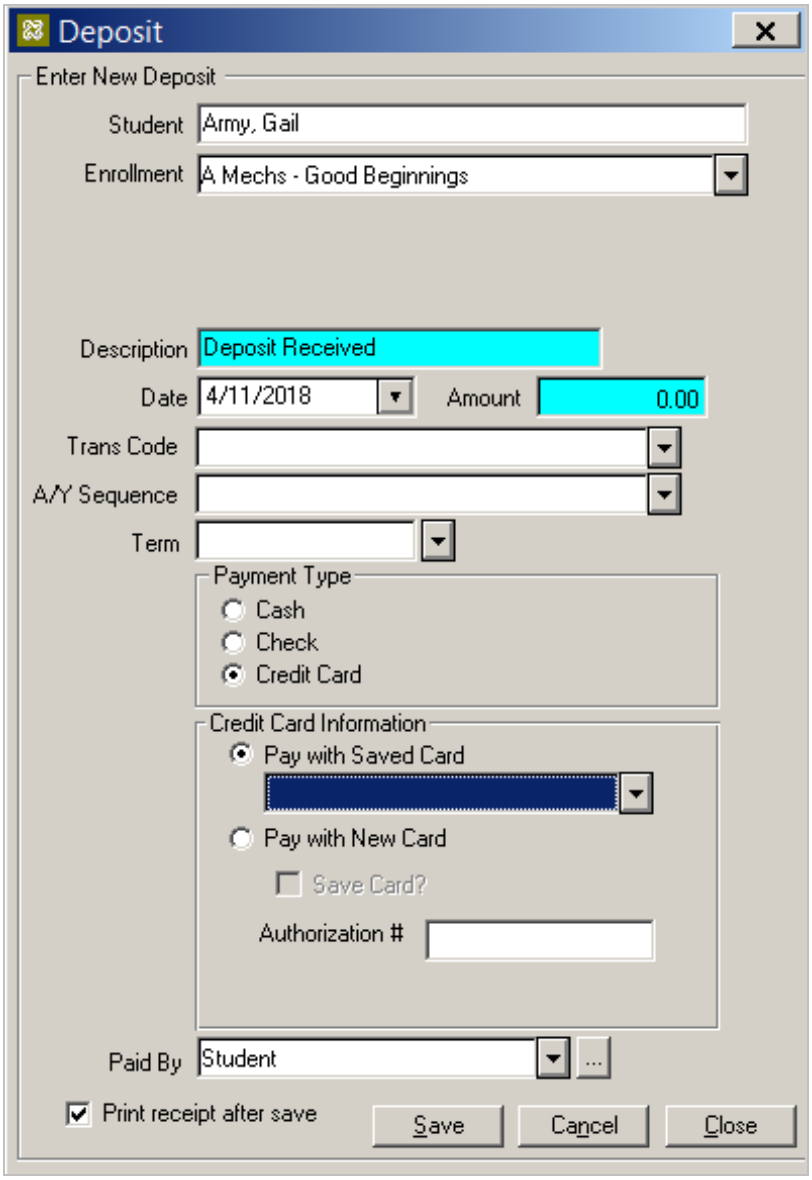
1. Select the lead or student from whom the deposit is to be posted.
2. Navigate to **View > Admissions > Deposit**.
    - If you are posting the first deposit for the student, the Deposit form is displayed.

      Note: If the student's campus is not configured to Verify Credit Card Payments Posted Using CampusNexus Student (Campus Information - Electronic Processing Tab), the form only has a single option for Credit Card Payment Type: Pay with Saved Card.

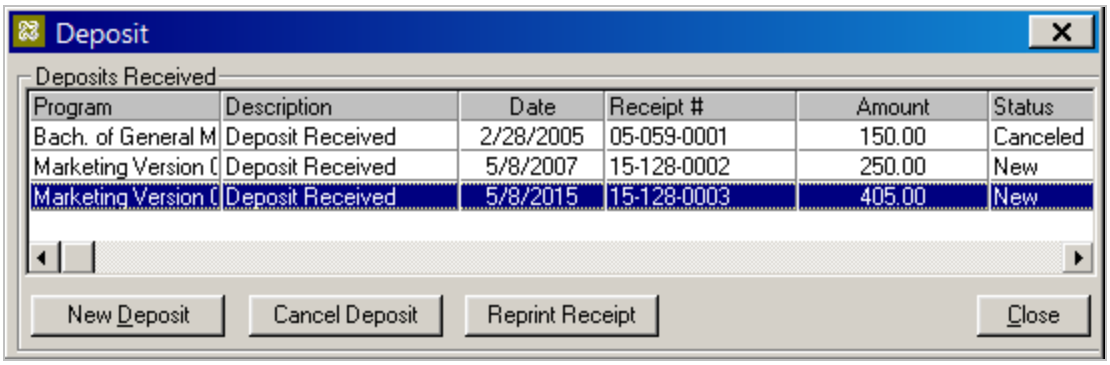


Note: If the student's campus is configured to Verify Credit Card Payments Posted Using CampusNexus Student (Campus Information - Electronic Processing Tab), there are two options for Credit Card Payment Type:

- Pay with Saved Card
- Pay with New Card



- If any deposits have been submitted for the selected student, the Deposit grid is displayed. When you click **New Deposit**, the Deposit form is displayed.



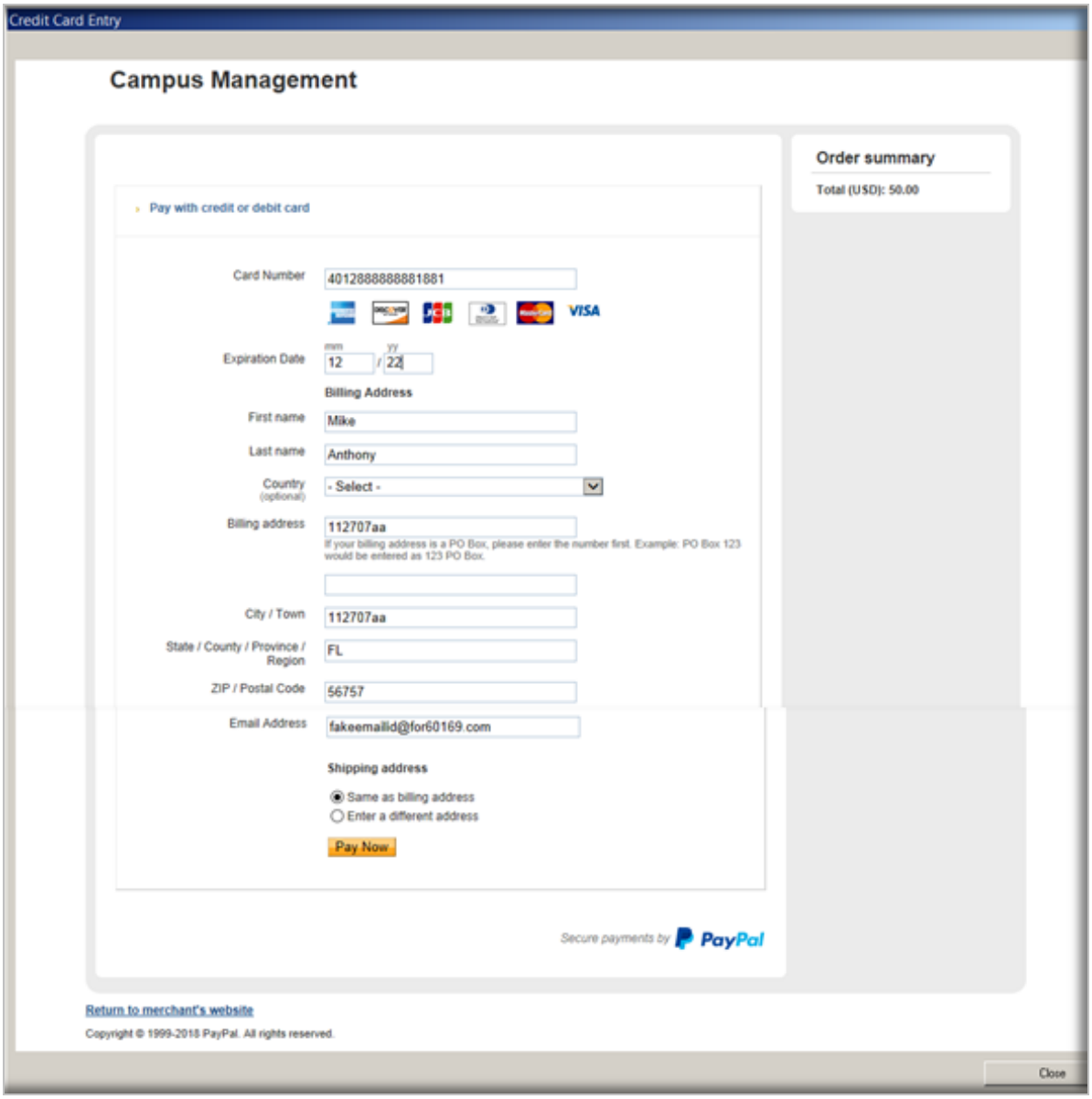
3. In the Deposit form, enter the **Date** and **Amount.**

4. Select a **Trans Code**. Only transaction codes with the Allow Deposits property set to True are available for selection.
5. Select the **A/Y (Academic Year) Sequence**.
6. Select the **Term**.
7. Select a Payment Type. The options are Cash, Check, or Credit Card.
    - If you select **Check**, enter the check number.
8. Select **Authorize** if the credit card needs to be authorized by a Credit Card Authorization Center.
9. When the authorization is obtained, enter the **Authorization Number**.
10. Select a **Paid By** option (e.g., student, parent). These options come from the student's Addresses list. To add an option, click . The Addresses form is displayed.
11. If you want a receipt, select **Print receipt after save**.
12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

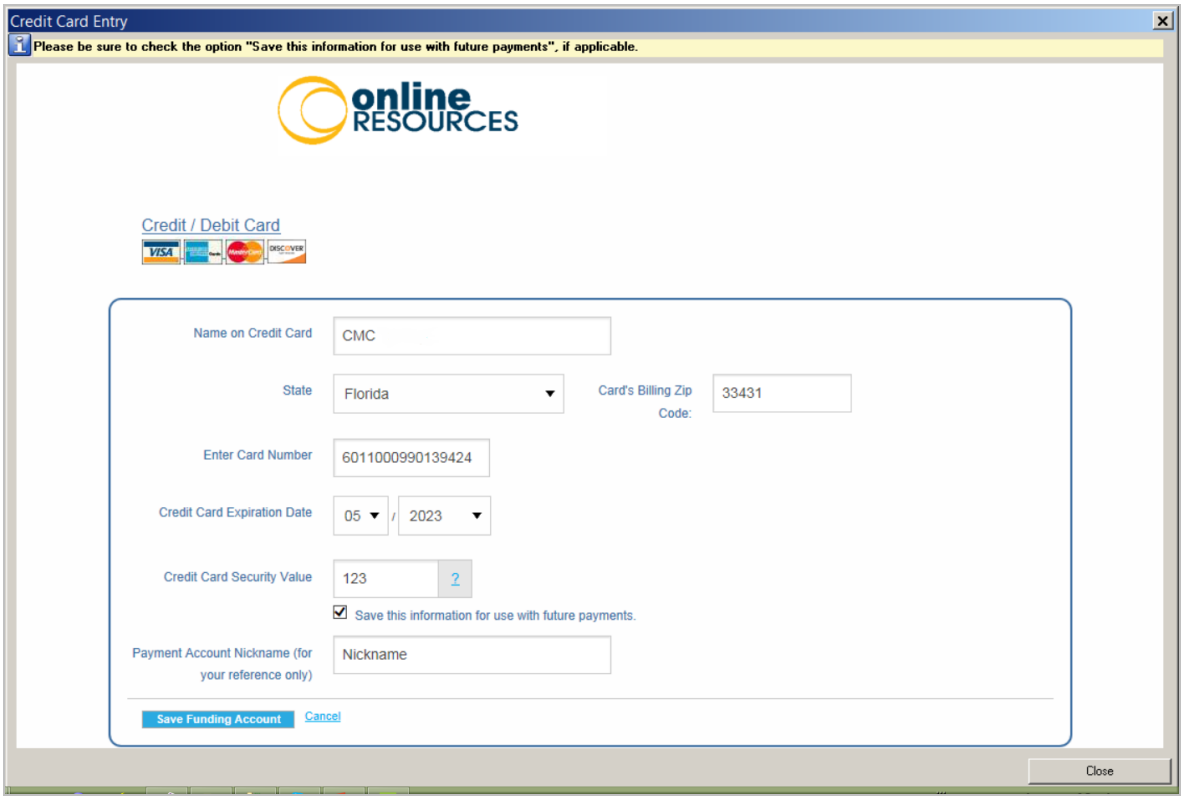
    If you have selected the **Pay with New Card** option, you are redirected to the payment gateway provider's hosted page to enter credit card information to complete the transaction.

    Note: Selecting the **Save Card?** check box will save the new card to the database as Active for future transactions. If you do not save the card, the card will be saved but will be marked as Inactive and won't be available for selection for future transactions.

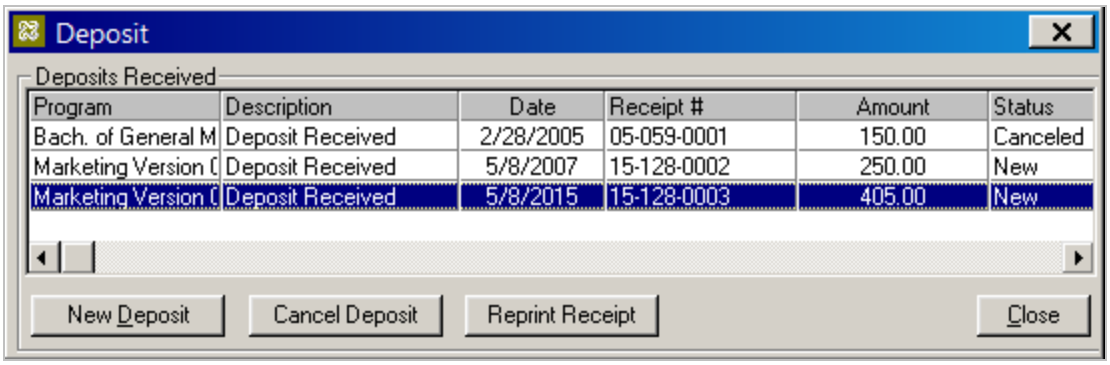
    PayPal


Credit Card Entry
Campus Management
Order summary
Total (USD): 50.00
Pay with credit or debit card
Card Number
4012888888881881
VISA
Expiration Date
mm
12
yy
22
Billing Address
First name
Mike
Last name
Anthony
Country
(optional)
- Select -
Billing address
112707aa
If your billing address is a PO Box, please enter the number first. Example: PO Box 123 would be entered as 123 PO Box.
City / Town
112707aa
State / County / Province / Region
FL
ZIP / Postal Code
56757
Email Address
fakeemailid@for60169.com
Shipping address
Same as billing address
Enter a different address
Pay Now
Secure payments by PayPal
Return to merchant's website
Copyright © 1999-2018 PayPal. All rights reserved.
Close

ACI



13. When the deposit is saved, the Deposit grid displayed. Note the values in the Status column.



14. To add deposit, click **New Deposit**. The Deposit form is displayed.
15. To cancel a deposit that has been recorded in error, select the deposit and click **Cancel Deposit**. A confirmation message is displayed. Click **Yes**.

    Note: A deposit can be canceled only if its status is **New**.
16. To reprint a receipt, select a deposit and click **Reprint Receipt**. A confirmation message is displayed. Click **Yes**.
17. Click **Close** to close the form.

Transfer Credits

Staff members can review the list of courses transferred from other institutions, and add, view, or edit transfer credit information, and add course relationships.

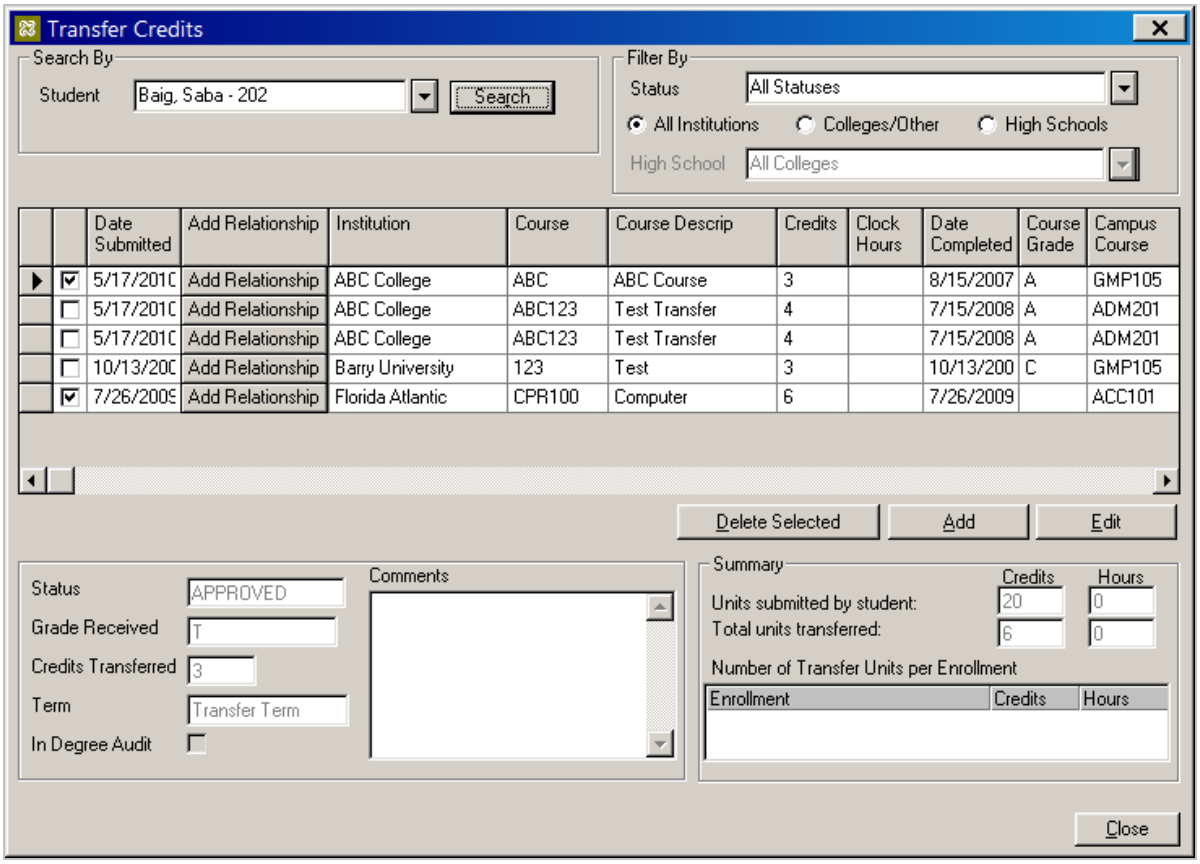
For program versions that use Academic Calendars 5 and 6 (non-term), CampusNexus Student automatically adjusts the Academic Year and Loan Period sequences and associated credits or hours and weeks as transfer credits are 'Approved' or changed from 'Approved' to a different status.

Approved transfer credits or hours in non-term configurations shorten the remaining course work that the student has to complete for the program version and is in direct relation to the academic year or loan period length and sequences. The "Credits in AY" ("Hours in AY") and "Weeks in AY" fields of the final academic year and loan periods are continually adjusted based on changes in the amount of transfer credits or hours.

When CampusNexus Student is enabled for Allow courses to be exempt from progression, the system uses the "Enrollment Status Credits (Hours)" of the linked course as the accepted value instead of the Credits or Hours value of the course on the student schedule when adjusting academic years and loan periods.

To transfer credits for an incoming student:

1. Navigate to **View > Admissions** or **Academic Records > Transfer Credits**.
   - OR -
   Navigate to **Daily > Admissions > Transfer Credits**. The Transfer Credits form is displayed.



Note: The options under **Filter By** allow you to view College transfer credit records, High School transfer credit records, or both (All Institutions). By default, **All Institutions** is selected and the drop-down lists to filter the records are unavailable.

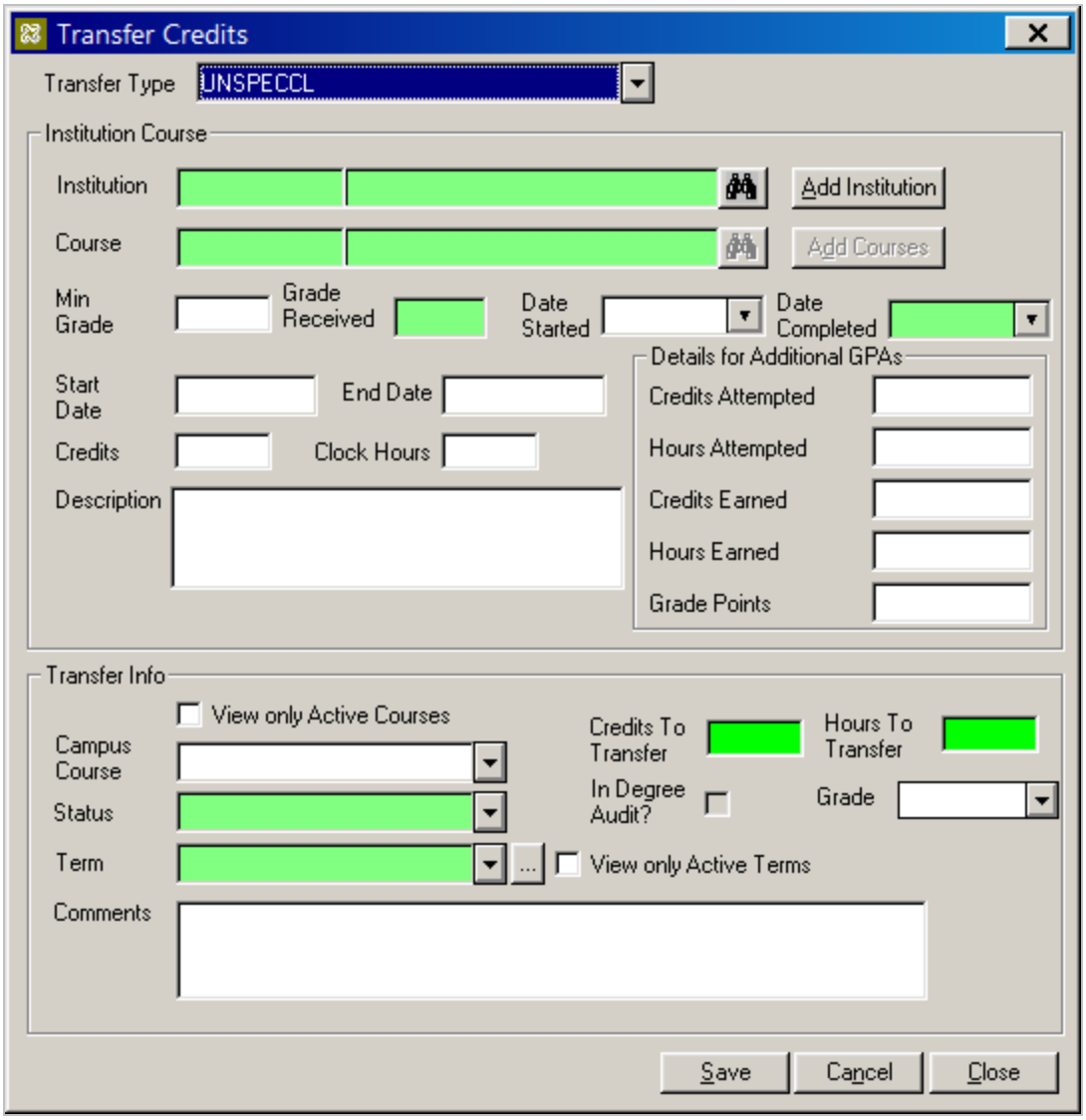
- If you select **Colleges/Other**, the College filter becomes available and only College transfer credit records get listed in the Transfer Credit grid.
- If you select **High Schools**, a High School filter becomes available and only High School transfer credit records get listed in the Transfer Credit grid. The list shows only those high schools for which Transfer Credit records are available.

Note regarding Number of Transfer Credits per Enrollment:

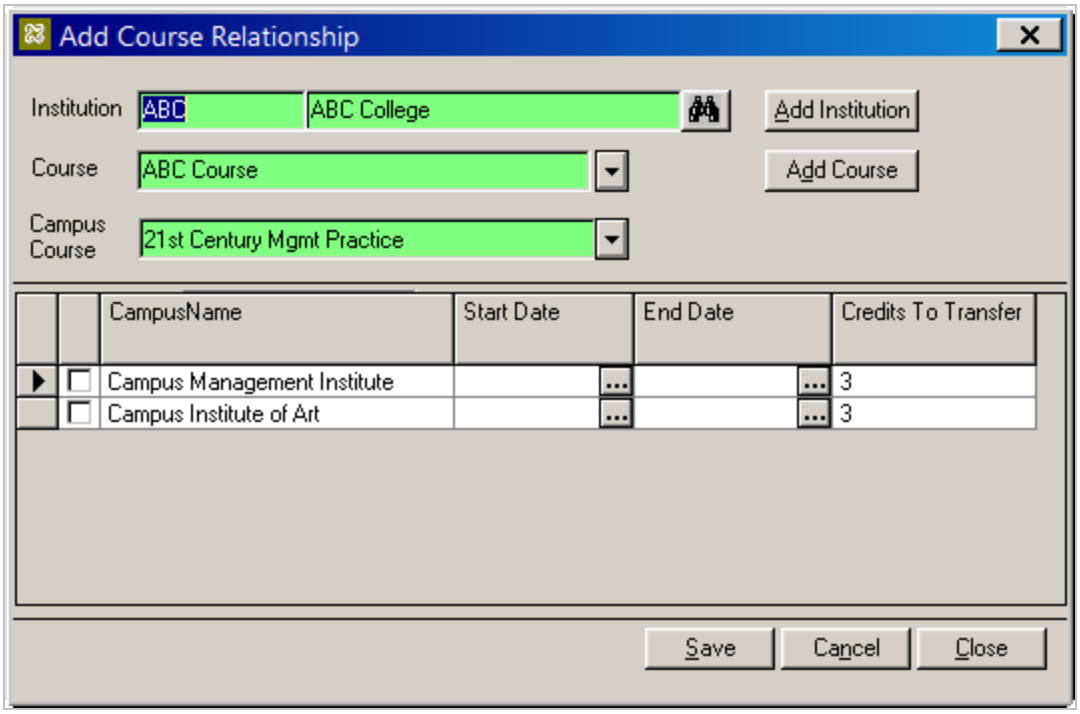
CampusNexus Student accurately tracks and updates the number of Transfer Credits on the student enrollment. If applicable, the following warning is displayed:

Transfer Credits entered exceed the number currently tracked on the enrollment. Automated processes or the academic year tool can be run to update the enrollment and Academic Years. If the student's current Academic Year is adjusted, the student should be repackaged according to the adjustment.

2. Click **Add**, or select a record and click **Edit**. The Transfer Credits form is displayed. The state (enabled/disabled) of **Add Institution** and **Add Courses** buttons depends on the staff member's Admissions security settings.



3. Complete the fields on this form as needed. See Field Descriptions.
4. To add a trans credit relationship to another campus, select a record and click **Add Relationship**. The Add Course Relationship form is displayed. Complete the fields on this form as needed.



5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Field Descriptions

Field	Description
Transfer Type	Use this drop-down list to select College or High School type of transfer credits. The list is populated with the entries available under Lists > Admissions > Transfer Type (tab). **Note**: The Institution Course frame and Transfer Info frame of the Transfer Credits form remain unavailable (dimmed) until you select a Transfer Type. If you select a College Transfer Type, you can Select/Add College and College Courses for transfer credit records. If you select a High School Transfer Type, you can Select/Add High School and High School Courses for transfer credit records.
Institution Course Fields	
Institution	Name of the institution (i.e., College/Other or High School) from where the course is being transferred is displayed in this field. You can use Search to select the institution using the Search College or Search High School forms. If the institution is not listed and you have proper access, click **Add Institution** to display a form with which to add the school.

Field	Description
Course	The name of the course being transferred is displayed in this field. You can select the course using Search. If the course is not listed and you have proper access, click **Add Courses** to display a form to add the course.
Min Grade	Minimum grade allowed for successful completion of the transferred course
Grade Received	Grade the student achieved
Date Started	Date when the student started the course
Date Completed	Date when the student completed the course
Start Date	Effective start date for the course
End Date	End date for the course
Credits	Number of credits the student earned at the institution where the course was taken
Clock Hours	Number of clock hours the student earned at the institution where the course was taken
Description	Brief description of the course
Transfer Info Fields	
View only Active Courses	Select this check box to filter terms by Active only.
Campus Course	Equivalent course offered by the selected campus
Credits to Transfer	Number of credits to transfer
Hours to Transfer	Number of clock hours to transfer
Status	Transfer status. A not yet **APPROVED** transfer status displays on the Degree Progress Audit only if a **Campus Course** is selected on the **Transfer Credits** folder. **Note**: If configured (Lists > Admissions > Transfer Status), the field displays course information on the Degree Progress Audit.
In Degree Audit?	This check box is enabled when the **Campus Course** selected is in the Program Version's required course list.
Grade	The student's grade to associate with the transferred course
Term	Term when the credits are applied **Note**: Non-term functionality in CampusNexus Student allows users to add transfer credits at any point during the student life cycle. Transfer credits adjust the academic year attributes and therefore the time it takes a student to complete the program.
View only Active Terms	Select this check box to filter terms by Active only. By default all terms, active and inactive, appear on the Term list.
Comments	Any related comments

Field	Description
Details for Additional GPAs The fields **Credits Attempted**, **Hours Attempted**, **Credits Earned**, **Hours Earned**, and **Grade Points** capture the information from previous institutions so that you can include courses for students from other schools in a school-defined GPA calculation. See school-defined GPAs/Additional GPAs. When adding a new transfer credit record, the fields Credits Attempted, Hours Attempted, Credits Earned, and Hours Earned are populated from Course Credits and Course Clock Hours as soon as you select a course. If the school-defined GPA is configured to use transfer courses and is a weighted GPA, these grade points are multiplied by the credits attempted to get the quality points for the calculation.	
Credits Attempted	Number of Credits Attempted from the student's transcript
Hours Attempted	Number of Hours Attempted from the student's transcript
Credits Earned	Number of Credits Earned from the student's transcript
Hours Earned	Number of Hours Earned from the student's transcript
Grade Points	Number of Grade Points from the student's transcript

View > Financial Aid

Note: For the latest content about FAFSA, ISIR and COD processing, access Regulatory Help.

The Financial Aid option on the View menu provides forms for working with the student's financial aid requirements. The options on this menu apply to the student selected from the Recent Students list.

Menu Item	Description
Student	Displays the Student Master form.
Packaging	Displays the form used to start Financial Aid Packaging process for the student.
Academic Year	Displays the student's Financial Aid Academic Year form.
Loan Period	Displays the Loan Periods form. This option is available only if the student is enrolled in a Clock Hour (Academic Calendar 5) or Credit Hours without Terms (Academic Calendar 6) program.
Awards	Displays the student's Financial Aid Packaging form.
FAFSA	Displays the FAFSA Main form. You can enter or edit a FAFSA for the current student.
ISIR	Displays the student's ISIRs. You can view or print the current student's ISIRs and enter corrections.
Summary	Displays the student's Financial Aid Summary report.
School Fields	Displays school-defined fields related to the Financial Aid module and public fields from other modules. You can view and enter data.
Audit	Displays a list of significant changes in the selected student's FA records.
Estimates	Displays an estimated financial aid package for prospects (leads) and enrolled students.
Documents	Displays the FA Document Tracking form, which is similar to the Document Tracking form, but only shows Financial Aid-specific documents for the student. It also allows the user to see ISIR information when an Award Year is selected in the main drop-down list.
State Report Evaluation	Displays the State Reporting Evaluations for the State of Georgia for the HOPE Grant/Scholarship and the Zell Miller Scholarship.

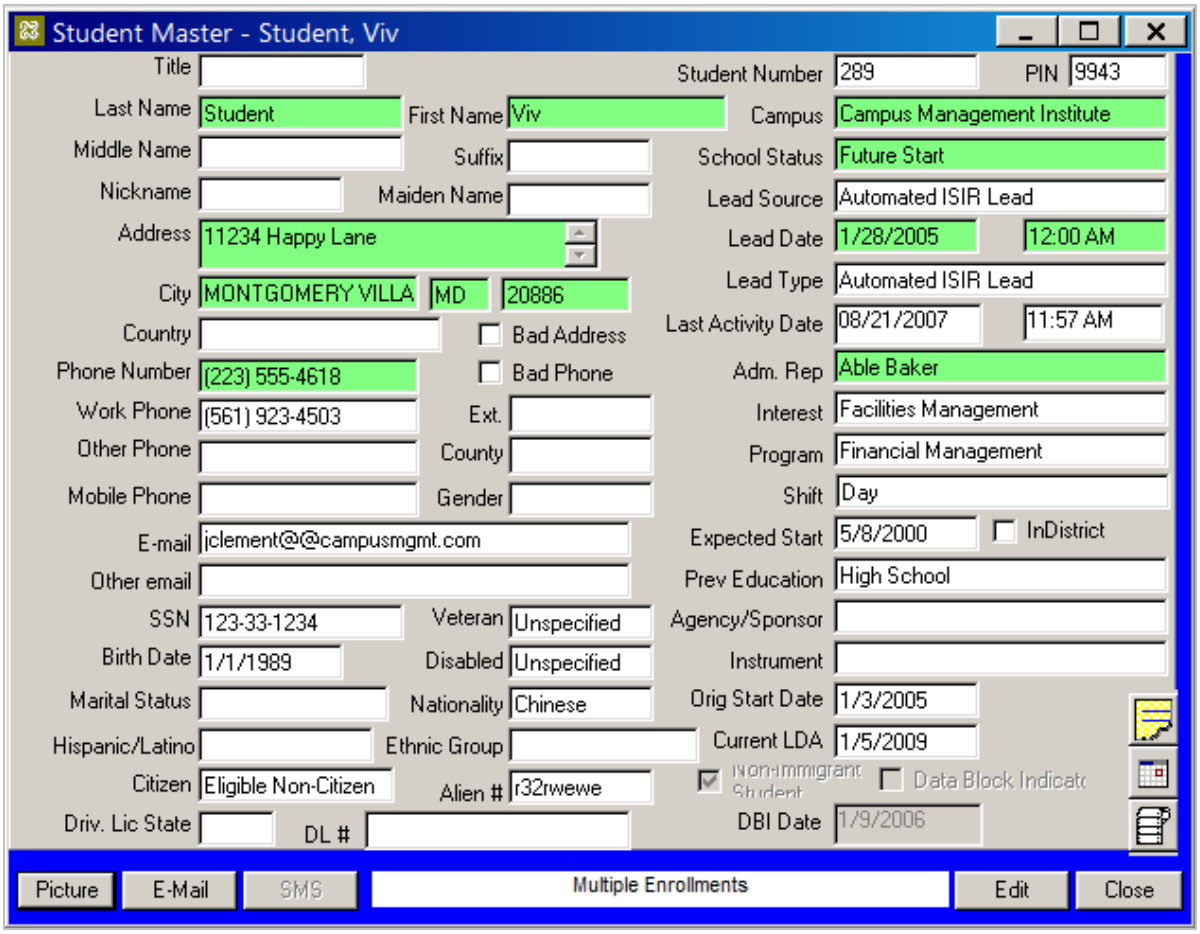
The options on the Student Bar are the same as the options on the View menu, unless the Student Bar has been altered by the user.

Student Master

The Student Master form contains much of a student's basic demographic information. The Student Master form is usually (but not necessarily) populated in the Admissions module by adding a new lead to the database. New leads are entered using the Quick Lead Entry form or the Add New Lead **Ctrl+L** option on the File menu. The **Ctrl+N** key combination can also be used to start a new Student Master record (form) without entering a quick lead.

To view a Student Master form:

1. Select one of the following options:
    - Click **Student** on the Student Bar.
    - Double-click **Recent Students** on the Toolbar. When you change the student in the Recent Students list, a new Student Master form is displayed. If you already have a Student Master form open, it remains open in the background.
    - From the **View** menu navigate as follows:
        - Contact Manager > Student
        - Admissions > Student
        - Financial Aid > Student
        - Student Accounts > Student
        - Academic Records > Student
        - Career Services > Student
        - Loan Management > Student
        - Student Services > Student
        - Housing > Student
    - Use the **Find** menu or click on the Toolbar to search for a student.



Note: The border color around the Student Master form indicates the student's status category. In the setup options under Setup > Status Codes > Colors Tab, your system administrator can choose colors for the status categories.

2. Multiple Student Master forms can be displayed at the same time. The forms always open in the same place in the work area. Unless you have closed, moved, or minimized a previous Student Master form, the next form you open covers the previous form.

   To move between open Student Master forms use the **Window** menu and select **Tile** or **Cascade** to organize all open forms in the work area.

   When you are working with multiple students, ensure that the correct form is current (active). The name of the current student is always shown in the Recent Students text box. The title bar of the active form is always a different color than other forms which may be open in your work area.

3. To edit the information on the form, click **Edit**. See Edit a Student Master.

   Required fields on the form have a background color other than white. If a required field is blank, you must enter data in it when you edit the form, even if you did not intend to provide the information when you clicked Edit.

   Some fields are required by CampusNexus Student (Last Name, First Name, Lead Date, Admissions Rep). Additionally, your institution may designate other fields as required. The system administrator can mark fields as required in either of two ways.

- Open any Student Master (or Quick Lead) form and go to Setup > Required Fields.
- Designate the field as required in the Data Dictionary.

4. To add an activity from the Student Master form, click the **Add Activity** icon at the bottom right of the form. The Activity form is displayed.
5. Click **Close** (Ctrl+F4) to close the active Student Master form. If you are in edit mode when you click Close, you are prompted to save any changes.

Duplicate Student Records

CampusNexus Student checks for duplicate Student Master records when new leads or students are added. The following table columns are used to check for duplicates:

- Student ID
- Social Security Number
- Phone Number
- Date of Birth and Student Name (combined)
- Driver's License Number
- E-mail address.

Each check is performed only if you entered data in the corresponding field. If at least one match is found, a grid showing the matches is displayed

If the lead is a duplicate and can be found on the grid, click the record and the lead form is populated with the information for that lead. The information can then be edited. The campus for the lead can be changed only if the campus ID for the record from the grid is in the list of campuses to which you have access.

Introduction to FA Packaging

Application Processing Updates

Users can perform FAFSA and ISIR processing for the current Award Year. Financial Aid Administrators can enter FAFSA data, submit and receive Application Processing data to CPS, perform ISIR Corrections and ISIR Verification with CampusNexus Student Regulatory. Each Award Year the Department of Education specifies what data will be gathered as part of the student's application for financial aid, and how that data will be used to determine Need and Eligibility for financial aid. These specifications are provided at the https://ifap.ed.gov/ website:

- https://ifap.ed.gov/software-and-other-tools
- https://ifap.ed.gov/ilibrary/document-types/fafsa-and-sar-materials

Processes updated to provide compliance include:

- FAFSA Entry
- FAFSA Export
- FAFSA Printing
- Print FAFSA Reports including Export Error Reports
- ISIR Import
- Global ISIR Import
- ISIR Matching
- ISIR Verification
- ISIR Corrections
- ISIR Reports
- ISIR Printing
- Manual ISIR Matching
- Document Triggers
- EFC Calculations
- Recalculate Estimated Pell Amount when enrollment changes
- Schedule Documents
- Process Error Report files
- Pell estimates

EFC fields are six digits in length. The primary and secondary EFC intermediate values are eight digits for: TI, STI, AI, AAI, and FISAP TI.

Selection of Latest Award Year when COD Grants and Direct Loans are Configured

Users can configure COD Grants and Direct Loan processing for the current award year; however, they cannot export COD Grants and Direct Loans to COD until the COD Processing Update is released.

The option to configure the current award year for Pell and Direct Loans is available via a DDL in CampusNexus Student Regulatory.

NSLDS Fraud Loan Flag Reject 24 Added to Reject Edits

Reject 24 for the NSLDS Fraud Loan Flag has been added to the Complete Reject Edits section. This reject was implemented on January 2, 2014 for the 2013-2014 and 2014-2015 award years.

ISIR Reports for the Current Award Year Include SLEU and SULA Content

The ISIR Summary Report, ISIR Import Report, Print ISIR Batches Report, Review/Print Multiple Print Batches, and Print Individual ISIR reports selections include the current year in the Academic Year (AY) menu list.

The associated report selection criteria includes a Subsidized Loan Eligibility Used (SLEU) Range for the SLEU values to be entered in whole numbers. The report selection criteria includes the option to determine the SLEU Range. The user can enter

the valid SLEU values in whole numbers. If the user does not enter a value, the default is 000000 to 999999. If a SLEU is not available, the field is blank on the report and on the file that is exported to Excel. While this field is available for all award years, it is only populated for the current AY and higher.

The NSLDS Subsidized Loan Eligibility Used Field (position 445) provides the total time during which the student has received Direct Subsidized Loans as of the date of the ISIR; it does not include the total time during which the student has received Direct Subsidized Loans while enrolled in a non-credential teacher certification program. In general, applicants may not receive Direct Subsidized Loans for more than 150% of the published length of the program in which they are currently enrolled. This field contains numeric 6-digit values, 000v000 to 999v999, where "v" is an implied decimal and is excluded from the output.

The ISIR Summary Report also includes the Subsidized Usage Limit Applies (SULA) Flag (where the valid values are Y or N). This flag is viewed for all Academic Years but is only populated for the current award year and higher.

Verification Tracking Group V6 Now Available

The V6 Household Resources Verification Group can be accessed ISIR Verification and scheduling document triggers. This group is not available for prior award years.

Group V2 No Longer Available for FAFSA

Verification Group V2 is not available when users are verifying 2014-15 ISIRs and forward. Verification Group V2 is also not available when scheduling document triggers for the current award year. Verification Group V2 is available when verifying or scheduling document triggers for 2012-13.

SULA Flag Added to FA Packaging

On July 6, 2012, Public Law 112-141 was enacted. This law contains a provision that eliminates the subsidy on Direct Subsidized Stafford Loans when a “first time borrower” enrollment exceeds 150% of the published program length.

For award years 2014-15 and higher, the Subsidized Usage Limit Applies (SULA) flag (where the valid values are Y or N) has been added to the COD system. Upon receipt of a Direct Loan actual disbursement with a first disbursement date on or after July 1, 2013, COD determines if the borrower meets the definition of a "first time borrower" to confirm that the 150% subsidy limit applies to the borrower.

When the SULA flag is set to Y, a SAR comment code 267 will appear if a first time borrower student is subject to the subsidized loan limitation. The message directs users to the studentaid.gov site. This flag is viewed for all academic years but is only populated for the current award year. When the ISIR is received and the SULA flag is associated with a comment code, document triggers associated with the comment code are activated. The SULA flag is also displayed in the Financial Aid Packaging form.

Sequester Updates for Direct Loan Origination Fees

On October 11, 2013 Federal Student Aid published Dear Colleague Letter (DCL) GEN-13-22, announcing FY 2014 Sequestration Changes to Title IV Student Aid Programs. The Sequester changes to Direct Loan origination fees per this DCL go into effect on October 1, 2013, where origination fees charged to Direct Loan borrowers go beyond last year's increases.

The new loan fees are 1.072 percent for Direct Subsidized Loans and Direct Unsubsidized Loans and 4.288 percent for Direct PLUS Loans (both parent and graduate student PLUS Loans). The increase applies to loans where the first disbursement is made on or after December 1, 2013. The loan fees on Direct Loans where the first disbursement was made on or after July 1, 2013 and prior to December 1, 2013 continue as noted in last spring's communications - 1.051 percent for Direct Subsidized and Direct Unsubsidized Loans and 4.204 percent for Direct PLUS Loans.

The change required to address this update to the fees shall not require an upgrade to CampusNexus Student as the initial code changes in Spring 2013 took into consideration this possibility; future changes could be made using a script to update the existing fee table.

Two scripts are used to correct the tables.

For Direct Loans:

The update script makes the appropriate changes to the tables so that institutions can originate Direct Loans using the new increased origination fee where the first disbursement is made on or after December 1, 2013. For Direct Loans where the first dis-

bursement was made on or after July 1, 2013 and prior to December 1, 2013 CampusNexus Student continues to apply those fees noted in last spring's communications.

- The first script identifies Direct Loan awards that are subject to the new fee increase but have the current lower fees populated for the loan and for which the loan has not yet been originated. After identifying these loans the script updates the loan using the new increased fee. Additionally, when the script updates any loan fee and CampusNexus Student is configured to include the actual loan fee in the student's Cost of Attendance (COA), CampusNexus Student updates the COA to include the updated loan fee amount. This script enables users to easily identify students when this occurs so they can potentially increase the student's packaged aid because they will have additional eligibility due the increased COA.
- The second script identifies Direct Loan awards that are subject to the new fee increase but have the current lower fees populated for the loan and for which the loan has already been originated. This script enables users to easily identify the loans and associated students because, based on guidance provided in GEN-13-22, the institution needs to cancel these loans and award a new loan using the correct fees under these circumstances.

Summary table of origination fee updates, based on earliest disbursement date:

Direct Loan Program Loan Fee Amounts			
Loan Type	**Impacted Loans**	**Loan Fee Percent**	**Fee on a Loan Amount of**
Direct Subsidized Loans and Direct Unsubsidized Loans			
(No Sequester)	First Disbursed Prior to July 1, 2013	1.00	$55.00 on a $5,500 loan
	First Disbursed on or after July 1, 2013 and Before November 30, 2013	1.051	$57.80 on a $5,500 loan
	First Disbursed on or after December 1, 2013 and Before September 30, 2014	1.072	$58.96 on a $5,000 loan
Direct PLUS Loans (Parent and Grad/Prof Student)			
(No Sequester)	First Disbursed Prior to July 1, 2013	4.00	$400 on a $10,000 loan
	First Disbursed on or after July 1, 2013 and Before November 30, 2013	4.204	$420.40 on a $10,000 loan
	First Disbursed on or after December 1, 2013 and Before September 30, 2014	4.288	$428.80 on a $10,000 loan
Loan fee calculations that result in more than two decimal points must be truncated to two decimal points (cents).			

Sequester Updates for Teach Award Limits

The Federal Government Budget Control Act (Sequestration legislation) created changes to Teach Award Limits.

COD Export Accommodates GEN-13-13 Changes

As a result of Public Law 112-141, the Department of Education is more strictly enforcing accurate reporting of Direct Loan Academic Year and Loan Period dates to COD. Institutions not complying with Title IV Regulations may be cited and penalized by the Department of Education. This affects Financial Aid offices that submit Direct Loan origination and disbursement records and adjustments to COD.

New fields and functionality have been added to CampusNexus Student to support every example provided in the Dear Colleague Letter GEN-13-13 to ensure that institutions using CampusNexus Student are able to report accurate Academic Year and Loan Period dates to COD.

For COD Processing, the academic year start and end dates and loan period start and end dates for each Direct Loan are updated on the individual loan instead of the loan period dates and the academic year dates set in CampusNexus Student:

- The Academic Year Start Date equals the Loan Academic Year Begin Date ("Ac Yr Start").
- The Academic Year End Date equals the Loan Academic Year End Date ("Ac Yr End").
- The Academic Year Begin Date equals the new Award Year Start Date.
- The Academic Year End Date equals the new Award Year End Date.
- When the user processes any COD export, CampusNexus Student retrieves the four dates from the loan record. This feature works across COD exports: Originations, Disbursements, and Origination Changes.

Sequestration Updates Affecting COD Processing/Award Amounts and Fees

On March 1, 2013, President Obama signed an order to implement sequestration that includes budget cuts affecting Federal Student Aid (FSA) program funds: Direct Loan, Campus Based, TEACH, and IASG programs are subject to these cuts through a reduction in the total award or an increase in fees associated with the program. By law, the Pell Grant Program is exempt from the effects of the sequester for the 2013-2014 award year.

Direct Loan origination fees have been increased as mandated by the sequester. For loans that had an earliest disbursement date on or after July 1, 2013:

- Batch and auto-packaged loans are packaged at COD with new fees.
- Package loan estimates use the new fee percentages.
- Loans that have not been originated at COD are corrected to reflect the new fee.
- Direct Subsidized Loans and Direct Unsubsidized Loans fees have been increased from 1.0 percent to 1.051 percent.
- Direct PLUS Loans (for both parent borrowers and graduate and professional student borrowers) fees are increased from 4.0 percent to 4.204 percent.

New COD Export Validation processes for sequestration include:

- Preventing Direct Loan records with the new higher origination fees from being exported to COD before June 28, 2013.
- Preventing Direct Loan records subject to the new higher origination fees from exporting with the current lower fees.

Important: The disbursement origination fees associated with the sequestration may affect the student's packaging costs. When a student is repackaged, an error message may appear stating that the associated origination fee is not valid. Users must acknowledge the error message and save the form again so that the fees are correct; otherwise the record will be rejected upon COD export.

Notes:

- A script runs at installation to modify the fees for loans that were created with the old fees but that have not already originated at COD. This script runs at installation for CampusNexus Student Regulatory 5.5.0 and higher.
- Another script is available for clients to identify loans originated with current fees but that are subject to increased fees due to sequestration, so that they can modify the fee (by canceling the loan and create a new loan with the new fee) appropriately.

COD processing will reject any records that do not comply with new fee amounts based on the earliest scheduled or actual disbursement date on or after July 1. 2013.

Important:

TEACH Grant awards are validated to ensure that if the earliest disbursement occurred after March 1, 2013, the maximum amount packaged is reduced as required in the sequestration legislation. Any institution that has disbursed TEACH funds to stu-

dents with the earliest disbursement after March 1, 2013 using the pre-sequester maximum award amounts must recalculate the TEACH Grant award amounts for upcoming payment periods.

Loan Period Dates Passed to COD

With the addition of Loan periods in CampusNexus Student, the COD Export and COD Import processes needed to be updated to use new loan period dates. If a direct loan has a loan period sequence selected, COD Export will use the new loan period dates for the Financial Award Begin and End dates, as well as the Academic Year begin and end dates. Direct loans without loan period sequences selects continue to use the Financial Award Begin and End dates from the loan, and the Academic Year begin and end dates from the academic year.

CampusNexus Student supports the updated use of the direct loan form for processing updates to existing loans with COD. To facilitate updating a loan on the direct loan form itself for changes to existing loans with COD, the COD Import process can now restore the previously accepted value at COD when changes are returned as rejected by COD. Additionally, the COD import process includes updating the borrower identifier, borrower Social Security number, borrower Date of Birth and borrower Last name while importing Identifier changes.

For the latest content about FAFSA, ISIR and COD processing, access Regulatory Help.

Note: This topic includes excerpts from "The Blue Book", a publication of the U.S. Department of Education. It is a guide for "accounting, record keeping, and reporting by postsecondary educational institutions for federally funded student financial aid programs".

This topic is a summary discussion of financial aid concepts, sources, and CampusNexus Student processing. CampusNexus Student assists in the management of the financial aid process. Please refer to the various FA-related topics of the CampusNexus Student Help system for more details about how the system deals with these functions. For more information about financial aid in general and federal aid sources in particular, please refer to the sources listed at the end of this topic.

Student Financial Aid Packaging

Student financial aid packaging encompasses all the arrangements necessary for a student to pay for his or her postsecondary education. For your institution in particular, this means the identification of sources of funds available to the student and the processing required to make those funds available to the student and the institution.

Fund Sources

Many sources of funds are available for meeting the financial needs of your students. The most prominent of these fund sources are the Title IV funds provided by the U.S. Department of Education. Title IV of the Higher Education Act of 1965, as amended (HEA), authorizes the Federal Pell Grant, William D. Ford Federal Direct Loan, Federal Family Education Loan (FFEL), Federal Supplemental Educational Opportunity Grant (FSEOG), Federal Work Study (FWS), and Federal Perkins Loan Programs. These programs are collectively known as Title IV programs. There are several other sources of funds provided by federal and state departments and agencies.

Other fund sources include third parties such as commercial financial institutions, private and governmental agencies, corporations, charitable organizations, parents of students, and of course, the students themselves.

Expected Family Contribution (EFC)

The basic premise underlying Title IV programs is that a student and the student's family have primary responsibility for paying for the student's postsecondary education. Because the programs are intended to help students with financial need, eligibility for assistance from most of the programs is need based. Congress developed an Expected Family Contribution (EFC) formula to determine the financial strength of a student's family and the student's need for Title IV assistance.

Free Application for Federal Student Financial Aid (FAFSA)

To apply for Title IV financial aid funds, students must submit a Free Application for Federal Student Aid (FAFSA). Most continuing postsecondary students may file a streamlined Renewal FAFSA. The FAFSA and Renewal FAFSA collect financial and other information from the student and the student's spouse (and parents of a dependent student) to calculate the student's EFC. The EFC represents the amount of money a student's family is expected to contribute toward the cost of the student's postsecondary education. The resulting EFC is reported on the Student Aid Report (SAR). Institutions receive an electronic version

of the same information, called the Institutional Student Information Record (ISIR). The EFC is used with the cost of attendance (COA) in determining an eligible student's need and the amount of aid that the student receives from each of the Title IV aid programs.

"Gift Aid" or "Self-Help Aid"

Title IV programs may be categorized as "gift aid" or "self-help aid." Gift aid consists of grants and scholarships that are given to students; it does not have to be repaid. Self-help aid takes the form of loans (which must be repaid) and employment (which pays students wages for hours worked at jobs provided on campus or off campus).

Gift Aid

- Federal Pell Grant
- Federal Supplemental Educational Opportunity Grant (FSEOG)
- Leveraging Educational Assistance Partnership (LEAP) (Federal funds allocated to states for grants to eligible students.)
- Robert C. Byrd Honors Scholarship (Federal grants to states for scholarships)

Self-Help Aid

- Federal Perkins Loan
- Federal Work Study
- William D. Ford Federal Direct Loan
    - Federal Direct Stafford/Ford Loan (Direct Subsidized Loan)
    - Federal Direct Unsubsidized Stafford/Ford Loan (Direct Unsubsidized Loan)
    - Federal Direct PLUS Loan (Direct PLUS Loan for parents)
    - Federal Direct Consolidation Loan
- Federal Family Education Loan (FFEL)

Other Federal Student Aid Programs

In addition to the Title IV programs, there are other federal financial assistance programs for students including AmeriCorps, The Hope Scholarship, Lifetime Learning Credit, and programs funded by the U.S. Department of Health and Human Services (HHS).

Financial Aid Processing in CampusNexus Student

Financial aid processing in CampusNexus Student includes several setup steps, data entry in lists, student-related procedures, and daily operations in both the Financial Aid Department and in the Student Accounts Department. Additionally, many data items in the Admissions and Academic Records Departments have a bearing on the functions of the Financial Aid Department. These are items such as student demographics, programs, program versions, enrollments, and so on.

Financial Aid Setup

Before you can begin financial aid packaging in your institution, the system administrator (SA) must set some parameters under the CampusNexus Student Setup menu. In the Campus Locations option, several items of campus-related static information such as identifications codes, name of FA Administrator, addresses, and so on, must be entered.

On the Setup menu under Financial Aid, the SA must set up the financial aid summary and detailed award letters. The SA must also indicate whether you are using the Clearinghouse for transmitting FA data.

Financial Aid Lists

Before students can be packaged for financial aid, you must populate the FA lists. Please refer to the related Help topics for more on these lists.

- Fund Sources
- Lenders, Servicers, and Guarantors
- Packaging Methods
- Packaging Statuses

- Academic Years
- Budgets (Cost of Attendance Budgets)
- Programs

Student-Specific Packaging Operations

Packaging

Packaging of financial aid in CampusNexus Student is organized around your institution's academic year. The Department of Education has several categories for academic years--two semesters, two trimesters, three quarters, 900 clock hours, and so on. Academic years are comprised of payment periods. This is especially for non-term based programs, or programs configured with an academic year of Non-Standard Terms, Clock Hours, or Credit Hours without Terms. At the time of enrollment, CampusNexus Student calculates Title IV payment periods according to the program's academic year settings; as mandated by the Department of Education. These payment periods are associated with student's financial aid disbursements within the Awards form. For more on how Title IV payment periods are created, see Title IV Payment Periods. As part of the FA setup, someone will tell CampusNexus Student about your institution's academic year.

Award years run from July 1st of one year to June 30th of the next year. Thus, a student's financial aid package for an academic year may span two FA award years. A FAFSA must be on file in CampusNexus Student for the first award year before you can package that academic year for the student. This is primarily important for Pell Grants which must be prorated between award years when the academic year spans two award years. Loans, on the other hand, are always packaged for an academic year. Adding a second Pell Grant for the same award year: There are some cases where it is OK to have more than one Pell grant for the same award year.

Before any student can be completely packaged and approved for financial aid disbursements, a FAFSA for the applicable award year(s) must be completed and sent to the Central Processing System (CPS). The CPS must return an approved ISIR. Corrections to the FAFSA may be necessary before the CPS approves the application.

When all of the setup data has been entered for your institution, you can begin packaging financial aid for your students. Students are packaged individually. First, you will select the student for which an FA package is needed. Then, from the View menu, you will select Financial Aid/Packaging. CampusNexus Student will open a form in which you will enter and select the appropriate options to package the student.

An automatic packaging feature is available to shorten the process. The automatic packaging feature is based on the Packaging Methods you set up under Lists/Financial Aid.

The packaging forms include logic to warn you when the amount packaged for the fund source exceeds the allowable commitment level for the fund source. This logic will check the FAGL Authorization table for the amount authorized for the award year and multiply this amount by the commitment level for the fund source. If the new packaging amount will exceed the commitment level, a warning message is displayed indicating that you have exceeded the level for the year.

In addition, after a student is packaged, the program will update the amount-packaged column in the FAGL Authorization table. Similar logic is included in the auto-packaging methodology. The program will check the commitment level for a fund source before adding the fund source to the student's scheduled aid. If the commitment level is exceeded, a message is displayed so you know why a particular fund source was not auto-packaged. If an amount is auto-packaged, the program will update the amount-packaged column in the FAGL Authorization table.

You can click **FAFSA** on the Packaging form to enter the necessary student and parent data for the application.

FAFSA

Without going through the Packaging option, you can enter data for a FAFSA to obtain an "estimated" EFC. A FAFSA entered outside of the Packaging routine will not affect any student academic year.

ISIR

For any lead or student, you can print an ISIR that has been received by your institution.

Daily Operations

From the **Daily** menu, select **Financial Aid**. You will see options that are normally performed by the Financial Aid Department in the daily course of business.

Approve Disbursements to Pay

The Financial Aid Officer (FAO) can review a list of scheduled disbursements and approve those that are ready for payment processing. After approval, the Student Accounts Department processes the disbursements for payment and applies them to the student ledger cards.

SSCR Process

CampusNexus Student can import the Student Status Confirmation Report (SSCR) from the Department of Education and compare the data to your student records.

Since the Higher Education Act of 1965, institutions have been required to confirm and report the enrollment status of attending students who receive federal loans. Because a student's enrollment status determines his or her deferment privileges and grace periods, as well as the government's payment of interest subsidies, SSCR is critical for effective administration of Title IV loans. It is the primary means of verifying students' loan privileges and the federal government's monetary obligations. The SSCR data is received from and sent to the National Student Loan Data System (NSLDS).

Your institution may use the National Student Loan Clearinghouse (NSLC). The "Clearinghouse" is a non-profit, industry-sponsored consortium, established by its member organizations (lenders, servicers, and guarantors) to proactively enhance the overall student loan program, and simplify the enrollment verification process. The Clearinghouse is not an agency of the U.S. Department of Education.

Print Batches of ISIRs

Typically, ISIRs are received from the CPS in batches. This option is provided to print these ISIRs. You can select the batch to be printed from a list presented by the system.

Financial Aid Data Communications

CampusNexus Student relies on your institution to have an arrangement with the Department of Education for the transmittal and receipt of student data. The tool that implements this communication process is a computer program known as **EDconnect**.

EDconnect runs on a personal computer (PC) at your institution and connects to the various agencies of the Department of Education (ED) using an attached modem. CampusNexus Student places outgoing data files in a directory that EDconnect can access. The EDconnect program looks for outgoing files in this directory and forwards them to the appropriate destination. Incoming data from various sources is also placed by EDconnect in the shared directory. CampusNexus Student looks for the incoming data in this directory and updates its database as required. Outgoing (export) files and incoming (import) files have distinctive names that identify the type of data they contain.

A list of export and import files that CampusNexus Student processes can be found under the Help topic Export and Import Files.

The Central Processing System (CPS) is a Title IV automated system that receives FAFSAs, performs data matches, processes student financial aid applications, and calculates the Expected Family Contribution (EFC) for each applicant, and prints the Student Aid Report (SAR). It returns the processed applicant data within 72 hours for printing of the Institutional Student Information Report (ISIR).

Recipient Financial Management System (RFMS) is the new processing system that institutions will use to report 1999-2000 Federal Pell Grant student payment data and request funding adjustments. RFMS improves and modernizes the Federal Pell Grant Program. It is a new system that uses origination and disbursement records. RFMS moves the Department towards implementing common processes and records for Federal Title IV program funding to students and institutions in accordance with Project EASI (Easy Access for Students and Institutions), the Department's collaborative initiative with the community to create an integrated, national student aid delivery system.

Under RFMS, institutions will submit an origination record and one or more disbursement records for each student who is eligible for a Federal Pell Grant, similar in concept to the Federal Direct Loan Program origination reporting process. RFMS interfaces with several other ED systems.

- The Central Processing System provides student eligibility information to RFMS for processing detail records.
- The Postsecondary Education Participants System (PEPS) provides RFMS with institution eligibility information.

- Title IV WAN is the primary vehicle that transports data between RFMS and institutions.
- NSLDS receives payment information for all students receiving Pell Grants.

The National Student Loan Data System (NSLDS), as a Title IV automated system, is a national database of information about loans and other financial aid awarded to students under Title IV of the Higher Education Act of 1965. This system pre-screens applications for Title IV aid, supports program administrative research functions, and improves Title IV aid delivery through automation and standardization.

The Loan Origination Center (**LOC**[1]) is also a Title IV automated system. It processes direct loan data from institutions and approves or rejects the loan applications. It also handles the processing of promissory notes and disbursement of loan funds.

Export Data

CampusNexus Student exports several types of data files to the various Department of Education service centers.

- Application Data
- Direct Loan
- Pell-RFMS
- Clearinghouse
- Servicers
- COD

Import Data

CampusNexus Student imports several types of data files from the various Department of Education service centers.

- Application Data
- Direct Loan
- Pell-RFMS
- COD

Note: You can elect to create a new lead master record if you receive an ISIR for a student that is not already in your CampusNexus Student database. You can receive an ISIR only if the student has designated on his or her FAFSA that your institution is to receive it.

Financial Aid - Related Student Accounts Functions

The Student Accounts Department handles a variety of procedures and transactions that are directly related to student financial aid.

For individual students:

- Payment Schedules
- Stipend Schedules
- Refund Calculations

For groups or batches of students:

- Post Individual Refunds
- Post Individual Stipends
- Print Refund/Stipend Checks
- Student Statements
- Third Party Invoices

Financial Aid Reports

CampusNexus Student provides a number of reports related to financial aid activities.

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[1]Loan Origination Center

- FA Summary Activity
- Packaging Summary
- Past Due Summary Cash Flow
- Student Financial Aid Summary
- Expected Cash Flow Summary
- Remaining Balance to Schedule (Academic Year, Program, or Term)
- Pell/RFMS Disbursement Analysis
- FA Export/Import Batch Tracking
- FA Disbursement Batch Tracking

Additional Information

You can find additional information about federal financial aid programs in the publications and Internet websites of the U.S. Department of Education.

- "The Blue Book; Accounting, Recordkeeping, and Reporting by Postsecondary Educational Institutions for Federally Funded Student Financial Aid Programs".
- "The Federal Student Financial Aid Handbook"
- The U.S. Department of Education website home page: http://www.ed.gov
- Information for Financial Aid Professionals: https://ifap.ed.gov/

Contact the various state Departments of Education for additional materials about student financial aid at the state and local levels.

Packaging

Financial Aid Packaging enables institutions to provide, in a single place, a comprehensive picture of the sources of assistance provided to a student.

This topic focuses on the Packaging form used in CampusNexus Student. For information on other aspects of the packaging process, see the corresponding topics in the CampusNexus Student and Regulatory Help systems, such as Introduction to FA Packaging, Start the Packaging Process, Add or Edit a FAFSA, Calculated FAFSA Result, and the various FA setup topics.

Payment Periods and Academic Year Packaging

Typically, the Financial Aid Department assembles a package of financial aid for each student in each academic year. Consequently, CampusNexus Student financial aid processing is also organized around academic years. The Packaging form collects financial aid data for a single academic year. It uses data from several sources, including the Academic Year form completed for each of the student's academic years. You can select a packaging method for a student immediately prior to running the package option. When packaging a student, CampusNexus Student finds the packaging method that is relevant to the student based on the packaging method setup.

Academic year packaging is normally accomplished one year at a time because FAFSAs are completed and renewed on an annual basis. However, when a student is enrolled in a program version that has multiple academic years, CampusNexus Student initializes a record in the student's database for each of the program's academic years. That is why you will often see more than one academic year on a student's list. You cannot package the succeeding years until FAFSAs or Renewal FAFSAs are completed for them.

For academic years that have two financial aid award years, you can select which of the two award years to display. If the academic year has only one financial aid award year, the information for that year is displayed.

When adding academic years (View > Financial Aid > Packaging > Add) and the 'Use TermInAYDates' flag is enabled, CampusNexus Student displays the message "Would you like to complete the sequence of academic years?"

- If you select Yes, CampusNexus Student checks the program setup and adds academic year sequences missing based on the Financial Aid terms closest to the dates of existing academic years or the enrollment start date.
- If you select No, CampusNexus Student creates a blank academic year with no defaults.

Students enrolling in programs that are configured with an academic calendar of Credit Hours without Terms or Clock Hours will be associated with two Title IV payment periods per academic year. The calculation is defined in CampusNexus Student and no additional configuration is needed to enable the payment period association.

Students enrolling in programs configured with Non-Standard Term academic calendar will only receive payment periods for awards that are Title IV loans where the academic terms that comprise the academic year differ in length by 14 days or more. Payment periods are not created for any other award types, or where the academic terms that comprise the academic year differ by 13 days or less.

Non-Title IV payment periods can be added to students individually within the Packaging form. For more information, see Title IV Payment Periods..

When auto packaging or re-packaging aid for a student, CampusNexus Student assigns the disbursement schedule for the academic year that is being packaged. If a fund source is configured to use a disbursement schedule, and there is no disbursement schedule found associated with the current Academic Year Sequence, or is not associated with any Academic Year Sequence (i.e., AY Sequence is NULL), no amount will be packaged against that Fund Source.

Institutions can also provide estimated financial aid packages after a change to an EFC, but before a revised ISIR has been returned to the institution. More information about this option can be found under Pell Paid EFC discussed below, and in Setup > Campus Locations > Add/Edit > Financial Aid.

Crossover Packaging

Crossover Packaging permits only one Pell grant and one SEOG grant to be packaged per award year. If you try to add a second Pell or a second SEOG grant, CampusNexus Student displays a message stating that another grant is already on file for the same award year. There is no option to override and continue adding the Pell grant.

Each disbursement of a packaged FA award may be applied to an academic year.

If you have a student with a crossover term or payment period that has not yet been packaged, it can be evaluated and the availability for that time period can be calculated for both award years. This functionality is enabled when the 'Package Crossover Term/Payment Period with Award Year 2 ISIR' is configured on the Pell grant fund source. So if the student does not have any additional eligibility for funds in the first award year for Pell, but the student has an ISIR on file for the second award year, the crossover period can be calculated and awarded with the new Pell grant for the second award year. If you package or batch package the student in a Crossover Academic Year with multiple award years, the system will package both award years simultaneously for the student when there is a valid ISIR on file for the second award year. When auto packaging, if you package the first award year, then receive the ISIR for the second award year at a later time, you can repackage the student and it will delete and recreate the awards based on the new information.

Note: You will not be able to repackage an award once there is a paid fund source on the academic year. So, if an award is completed for an academic year that has a crossover period, there is no new award year eligible ISIR, and any fund source is paid prior to the new award year ISIR, the system will not use automatically package the new award year Pell grant amount. The award needs to be done manually to add the new award year Pell grant since there may be adjustments to the remaining fund sources that will need to be applied, thus requiring evaluation by the institution.

If an award exists for the student, you can amend an existing Pell award for the current award year when adding in a new Pell grant for the existing year on another academic year. All the existing information will still be used within the calculation and will be visible. When auto packaging and batch packaging, if addition eligibility is calculated on the crossover period, it will append to the existing award as well in another academic year.

Financial Aid General Ledger and Packaging

The Packaging form displays a warning when the amount packaged for the fund source exceeds the allowable commitment level for the fund source. CampusNexus Student checks the Financial Aid General Ledger (FAGL) Authorization table for the amount authorized for the award year and multiplies this amount by the commitment level for the fund source. If the new packaging amount exceeds the commitment level, the warning is displayed.

After a student is packaged,CampusNexus Student updates the Amount Packaged column in the FAGL Authorization table. CampusNexus Student checks the commitment level for a fund source before adding the fund source to the student's scheduled aid. If the commitment level is exceeded, a message is displayed describing why a particular fund source was not auto-packaged. If an amount is auto-packaged, CampusNexus Student updates the Amount Packaged column in the FAGL Authorization table.

Truth in Lending

The Truth in Lending Act in Title I of the Consumer Credit Protection Act requires clear disclosure of key terms of the lending arrangement and all costs. For institutions, these regulations do not apply to lenders of student loans. Disclosure must be made of the following credit terms: Finance Charge, Annual Percentage Rate, Amount Financed, and Total of Payments. In cases where there is no financing charge, Truth in Lending information will be suppressed.

If an institution uses Crystal Reports to generate Award Letters, CampusNexus Student provides lending information associated with each specific fund source. Users of Crystal Reports can also report awards by Award Year or Academic Year.

Term Lists

The Term lists on all FA packaging forms is sorted by date with the most recent terms first. When scheduling disbursements for a student fund source, the Term list boxes are sorted by Term End Date in descending order.

Number of Disbursements

The maximum number of allowed disbursements differs based upon the financial aid type. The maximum number of disbursements allowed by financial aid type is as follows:

- Perkins - 6
- Non-Pell Grants - 6
- Other Loans - 6
- Work Study - 6
- Pell Grant - 15
- Direct Loans - 20

- Subsidized Loans - 20
- Unsubsidized Loans - 20

Student cash disbursements are unlimited.

Note: Financial Aid award years begin on July 1st and end on June 30th. When Pell or campus-based funds are awarded to a student, CampusNexus Student evaluates all scheduled disbursements for the award. If any scheduled disbursement is dated is after the June 30th deadline, CampusNexus Student prevents the disbursement from being counted as part of the award. If a disbursement date is after June 30th, students must complete another FAFSA for the following award year and the disbursement will be paid from that award year.

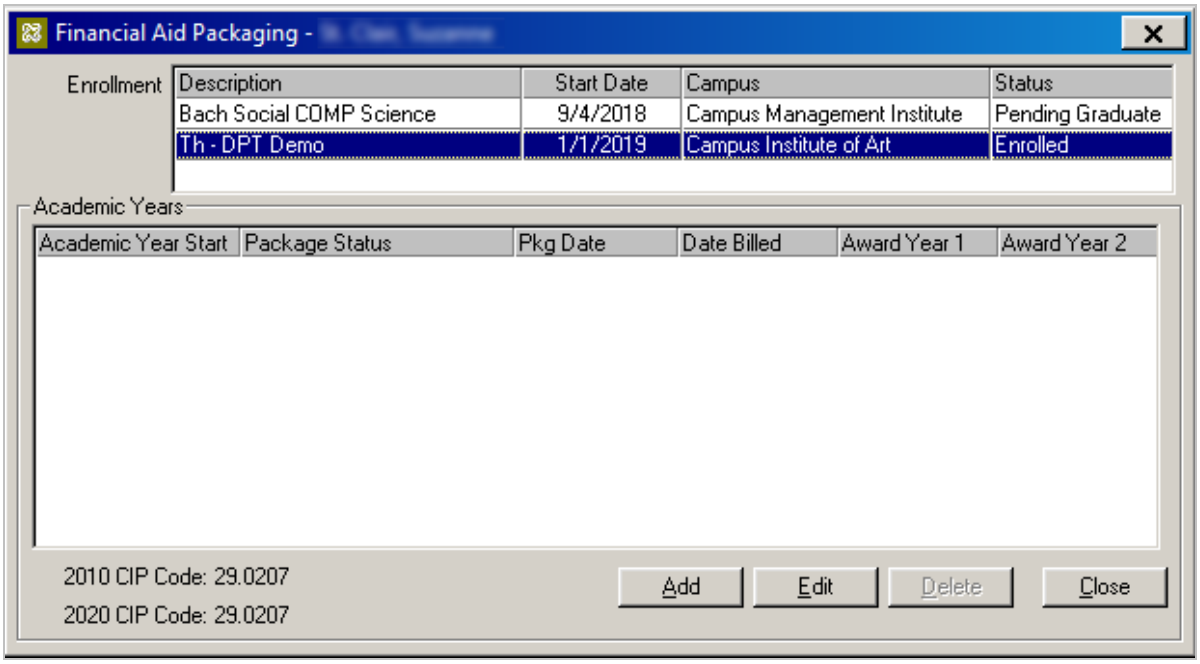
Decimals entered for percentages follow these rules:

- If the number of disbursements is one or two, CampusNexus Student does not allow decimals.
- If the number of disbursements is three or more, decimals are allowed.
- All percentages entered for a financial aid type must add up to 100.00.

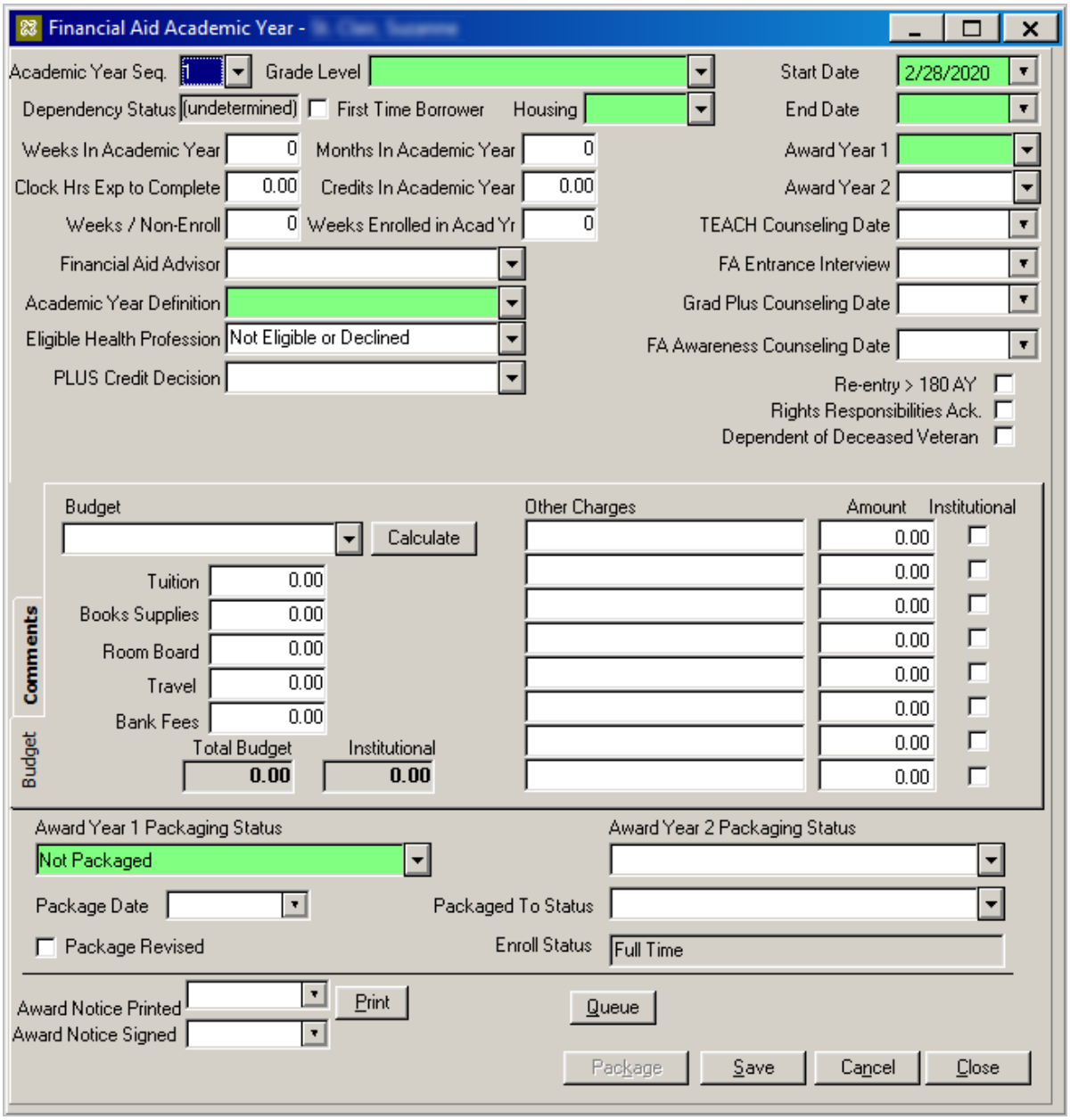
When a student is dropped, financial aid is canceled. If the student is reinstated, financial aid must be "re-expected". Scheduled disbursements are not automatically changed back to scheduled. Review scheduled disbursements for each fund source to "re-expect" the disbursements that still apply.

To organize the financial aid package for a given academic year:

1. Select the student for whom you want to package an academic year.
2. Navigate to **View > Financial Aid > Packaging**. The student's list of academic years is displayed. See Associate CIP Code with Program for details regarding the CIP Code.



3. Click **Add** to add an academic years for the selected student, or select an academic year and click **Edit**. The Financial Aid Academic Year form is displayed.



4. When everything is accurate and complete on this form, the student's FAFSA has been completed, and the EFC has been calculated, click **Package**.

   Note: If a student does not have a FAFSA or ISIR on file and has an undetermined dependency status/model, you are prompted to assign the student with a Dependent status/model when packaging a FFEL or Direct parent PLUS loan. If you do not assign the student with a Dependent status, CampusNexus Student relies on existing validations and you cannot package the parent Plus loan. Additionally, the student's dependency model remains undetermined. If you assign the student with a Dependent status, CampusNexus Student updates the student's record, allowing you to proceed and package the Direct Parent PLUS award.

   After a Direct Parent PLUS Loan has been awarded for a student, CampusNexus Student validates the Dependency status. If there is a discrepancy between the manually updated Dependency status and the Dependency status from a FAFSA or ISIR now on file, CampusNexus Student displays a validation message to alert the

Financial Aid Officer that the award needs to be refunded or canceled since it no longer applies for the student. An audit record is created indicating the person that updated the Dependency status. The COD export for the Direct Parent PLUS loan will export the updated Dependency status as well. For dependent students, if their parents had applied for a PLUS loan, the value selected in the PLUS Credit Decision box is displayed in the Financial Aid Packaging form as a read-only field.

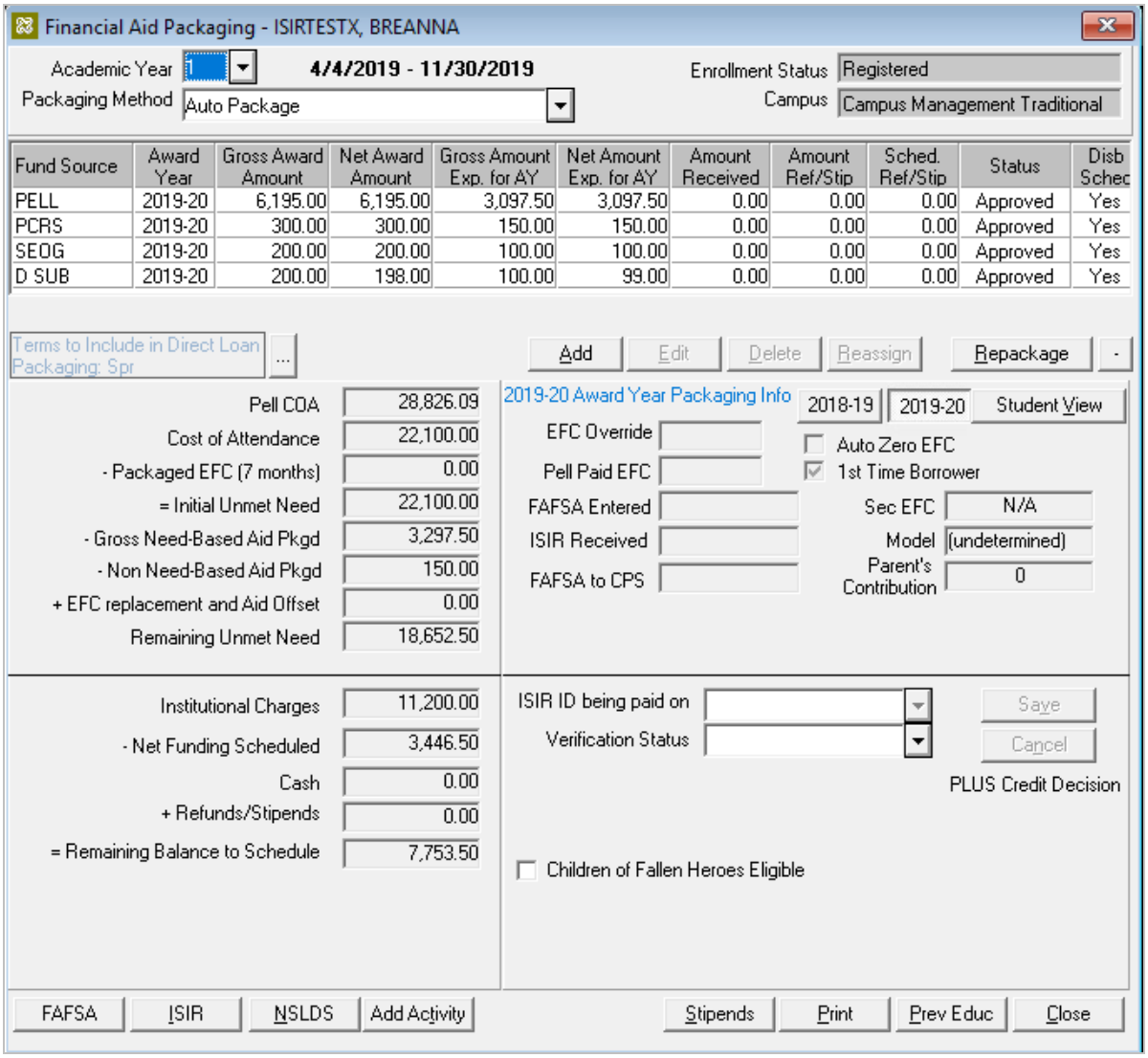
5. The Financial Aid Packaging form is displayed. The grid on the form can be a 'Standard' or 'Alternate' Student's Package Remaining Balance to Schedule (RBS) grid.

    - If **Standard** was selected as the Student's Package RBS grid in the Financial Aid - Settings screen accessed through Setup > Financial Aid > Packaging, the (standard) Financial Aid Packaging form is displayed.
    - If **Alternate** was selected as the Student's Package RBS grid in the Financial Aid - Settings screen accessed through Setup > Financial Aid > Packaging, the Financial Aid Packaging form is displayed.

    On either form, you can **Add**, **Edit**, **Delete**, **Reassign**, **Package**, or **Repackage** the student's financial aid fund sources for the selected academic year.

    Adding, changing, or deleting this information triggers an automatic posting of information to the Financial Aid Audit folder. If your institution has chosen to recalculate financial aid packages based on a recalculated EFC, and if the ISIR ID is the same as the ISIR ID with the corrections made to it, CampusNexus Student asks you if you want to use the recalculated EFC to package aid.

    The following is an example of the standard Financial Aid Packaging form.



6. Click **Close** to close the form. You are returned to the Academic Year form.

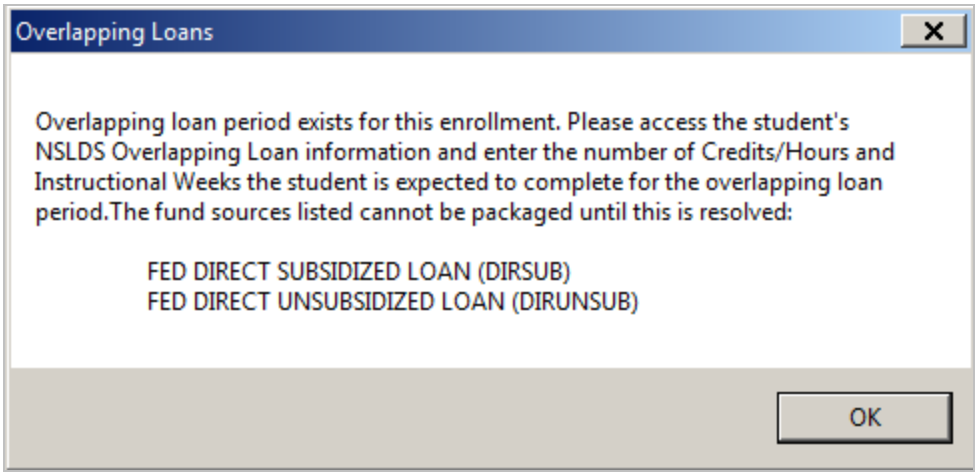
Note: Much of the data on the Packaging form is carried over from other sources or is calculated by CampusNexus Student. Elements that are dimmed cannot be changed on this form.

Field Descriptions: Standard Packaging Form

Field	Description
Academic Year	This list box indicates the academic year for which you are packaging the student.
Enrollment Status	This read-only field is the current enrollment status of the student you are packaging.

Field	Description
Packaging Method	Select the Packaging Method to be used for this student in this academic year from the list box. **Note**: Students that are configured with the Unsupported Dependent check box enabled are packaged with Unsubsidized Staff loans only, despite the value displayed in the Packaging Method field. The logic for gathering the rows to populate the grid is as follows: • First, CampusNexus Student selects all records from the student's FA Award Schedule where the Academic Year equals the Academic Year in the Student Academic Year table. It groups the records by the Student Aid ID (fund source) so each unique ID will constitute a new row on the grid. • Then, CampusNexus Student finds any records in FaStudentAid where Academic Year equals the Academic Year in the Student Academic Year table AND no FA Award Schedule records exist in the FA Schedule table for the ID. Each record found will constitute a new row on the grid.
Fund Source	This is the source of funds for this element of the financial aid package.
Award Year	This is the award year for which the funds are awarded.
Gross Award Amount	This is the amount packaged before bank fees have been deducted.
Net Award Amount	This is the amount packaged after bank fees have been deducted.
Gross Amount Exp for AY	This is the Gross amount of the disbursements in the academic year adjusted for refunds. This enables staff members to reconcile the award disbursements with the amounts in the Need Analysis grid. Note: When a refund is posted for a Direct Loan, any fee adjustments for the loan are factored into the gross amount calculations made in this field. This ensures that the gross amount for the Direct Loan displayed in the Need Analysis grid is accurate.
Net Amount Exp for AY	This is the Net amount of disbursements in the academic year, not adjusted for refunds. This enables users to reconcile award disbursements with the Net funding scheduled in the RBS grid.
Disb Sched	The Disbursement Scheduled field shows whether disbursements have been scheduled for each FA fund source. This column is populated with Y or N. You can quickly determine if an expected disbursement schedule exists for each FA fund source packaged in the specified academic year. For estimated awards, this field is initialized to N and schedules are not automatically calculated.
Amount Received	This is the amount received to date from the selected fund source.
Amount Refund/Stip	This is the amount refunded to the selected fund source or stipends paid to the student to date from this fund source.
Scheduled Refund/Stip	This is the amount of scheduled refunds and stipends to be paid from the selected fund source. The Scheduled Refunds/Stipends column is calculated by summing all scheduled refunds and stipends from the FA Refund and Student Accounts Stipend Schedule tables.

Field	Description
Status	This is the status of the fund source with respect to this package, in other words, estimated, approved, canceled, or pending. The status of the fund source will be captured and posted to the Financial Aid Audit Folder.
Terms to Include in Direct Loan Packaging: Fall, Spr	Using the Term Association configuration is necessary for term based program versions in CampusNexus Student to determine Loan Period and Academic Year dates. These are required to be accurately reported to COD, NSLDS under guidance provided in Dear Colleague Letter (DCL) GEN-13-13. Institutions that choose not to use the Term Association feature will be responsible for manually managing and adjusting Loan Period and Academic Year dates to ensure regulatory compliance required under GEN-13-13. This includes processes such as Gainful Employment and SSCR. This is used to display the terms that are being packaged for the Academic Year for Direct loans. Click to display a dynamic list of the terms (Summer, Fall, Winter, Spring) available for packaging within the Academic Year. The selected terms are used to build the loan period dates on the Direct Loans. This will only appear for enrollments with a program versions using an Academic Calendar that is Standard Term (2, 3, 4) and the expected start date matches the configured start as well as the start date of the first term in the Term Association form.
No Term Association	If the Academic Years are not built using Term Association, then "*No Term Association*" is displayed on the form. This can happen if Term Association is not fully configured, or if the user selected an expected start date during the enrollment process that does not coincide with a configured Term Association start date.
Add	Click **Add** to add a new fund source to the student's financial aid package. Adding a fund source will generate an automatic posting of package amount, award year, fund source and status to the Financial Aid Audit Folder. If you click Add for a fund source that has been deactivated for the award year and campus, the fund source will not be available for selection in the fund source list in the New Source of Aid screen.
Edit	Select a fund source on the grid and click **Edit** to view or change it. The appropriate form is displayed. Editing a fund source will generate an automatic posting of package amount, award year, fund source, and status to the Financial Aid Audit Folder. If you select an existing fund source that has been deactivated for the award year and campus, the Edit button will be labeled View. The Delete, Reassign, and Student View buttons will be disabled and no changes can be made for the fund source. In addition, a message will appear in red at the bottom of the screen: "*Selected fund source is deactivated for this award year*" if a single fund source is deactivated for the award year and campus; or it reads "*Selected fund sources are deactivated for this award year*" if multiple fund sources for the award year and campus were deactivated.
Delete	Click **Delete** to remove a fund source from the student's FA package. A deleted fund source will generate an automatic posting of package amount, award year, fund source, and status to the Financial Aid Audit Folder.

Field	Description
Reassign	Click **Reassign** to access the Package Move Aid form. The form allows you to select from a list of Academic Years to reassign the aid. When reassigned, the FaStudentAyID will be updated in FaStudentAid, FaSched,edits and Fa Disb for the selected student aid record. The Reassign button is available only if: • The "Allow to reassign Academic Year on Student Aid?" option is enabled. • The user has Edit access to the Student Packaging form. • The enrollment has more than one academic year.
Package/Repackage	When the student is packaged for the first time, this button is labeled **Package**. Click this button to package the student's financial aid automatically using the available data and the packaging method for the academic year. After the student is initially packaged, the label on this button changes to **Repackage**. Click it to redo the automatic packaging of the financial aid. When you auto-package a direct loan award for an overlapping loan period and did not populate the fields "Overlap Period Credits/Hours" and "Overlap Period Weeks" in the “NSLDS Loans / Overlapping Loan Periods” tab of the NSLDS Previous Institute Details form, the message below is displayed. The "Overlap Period Credits/Hours" and "Overlap Period Weeks" are required to create loan periods to award direct loans for the overlapping loan period.  When adding loans, CampusNexus Student compares the packaged amount with the loan limit set up for the fund source. If the amount is greater than the loan limit, CampusNexus Student uses the loan limit. See Campus Financial Aid, Fund Source, Award Year Settings, and Packaging for additional information. When editing loans, if the loan amount exceeds the loan limit for the fund source for the campus, an error message is displayed, stating that the amount entered is greater than the allowable amount and the loan amount will be set to the loan limit amount.

Field	Description
	The button just right of the Package/Repackage button enables you to expand or collapse the window that contains the grid of FA fund sources. The symbol on the button changes as follows: . The grid has not yet been expanded. Click to expand. /\ On the expanded form this button will restore the grid to its original shape. \/ The grid has been expanded and restored. Click to expand. **Note:** The package function uses the loan limits and bank fee of 2.5.% for DIRSUB/DIRUNSUB awards with first disbursement after July, 1st 2007 as stated on COD Technical Reference. CampusNexus Student checks loan limits and adds the preparatory professional course work indicator from the program version.
Student View	Click **Student View** to see a student-centric view of awards. You can filter the view by Award Year, Fund Source, Fund Source Type, and/or Enrollment. Award Detail and Summary information is displayed depending on the selection criterion. The **Refresh Awards** button returns only the Awards Summary and Awards Detail information that matches the selection criterion, while the **Reset Filter** button displays ALL award records for the student. You can **Edit** the Award Records directly from this form if you have permission. If no awards are allocated for any of the student's Enrollments, the Student View button is not available.
COA and Need Data	The calculated cost of attendance and student need data is displayed below the grid. These fields cannot be changed.
Pell COA	This field only appears on the Standard Students Packaging RBS grid. Calculated Pell Cost of Attendance is based on a nine-month academic year. If your academic year is longer or shorter, this value may differ from your estimated COA below. This field is not available when selecting the Alternate RBS grid.
Cost of Attendance	This cost of attendance (COA) budget value is carried over from the academic year form. **Note**: The Cost of Attendance will increase if “Add bank Fees to COA” is set to Yes.
Packaged EFC (x months)	This is the Expected Family Contribution used for packaging. If the COA budget is not based on 9 months, this figure will be the alternate EFC value for the number of months in the budget. The Packaging EFC value is determined as follows: • If the number of months in the academic year is nine, the Packaging EFC will be the Pell Paid EFC. • If the number of months in AY is not nine and is not zero, the Packaging EFC will be the value calculated for the number of months in the academic year. This field is labeled EFC [#months] on the Alternate RBS Grid.
Unmet Need	Unmet need is the difference between cost of attendance and the Packaging EFC. This field is labeled Need on the Alternate RBS grid.

Field	Description
Gross Need Based Aid Packaged	CampusNexus Student displays the gross amount of financial aid packaged based on the Department of Education's definition of need-based aid. For the Alternate RBS Grid, Gross Need Based Aid Packaged is labeled the same as the Standard RBS grid. **Note**: The Need Based Aid packaged amount is populated as per the configuration of the fund source on the Fund Source Code Setup form.
Non-Need Based Aid Packaged	This is the amount on Non-Need-Based Aid Packaged. It includes sources such as unsubsidized loans where financial need is not a criteria for the award. **Note:** The Non-Need Based Aid packaged amount is populated as per the configuration of the fund source on the Fund Source Code Setup form.
Total Aid Packaged	This field only appears on the Alternate RBS grid and represents the amount of the Gross Need Based Packaged plus the Non-Need Based Aid Package.
COA (-) Total Aid Packaged	This field only appears on the Alternate RBS grid and represents the amount of the Cost of Attendance plus the Total Aid Packaged.
Need (-) Total Aid Packaged	This field only appears on the Alternate RBS grid and represents the amount of the Need minus the Total Aid Packaged.
Remaining Need	Remaining Need is Unmet Need minus Net Need Based Aid Packaged.
Cash/Other Packaged	This is funding provided by the student or by sources other than the Department of Education, for example, agencies, scholarships, and student-provided resources. The logic for calculating this field is as follows. • CampusNexus Student sums the net amount for all records in the student's FA schedule where the academic year is the same, the schedules status is not equal to C, and the fund source type is Cash or Other. • CampusNexus Student sums the amount packaged minus the bank fee for all records in FaStudentAid where the academic year is the same, no records exist in the schedule for this FA, and the Fund source type is Cash or Other. The Cash/Other Packaged will be the sum of calculations 1 and 2.
Institutional Charges	This is the total of tuition, books and supplies, and other charges that have been designated as institutional charges. Institutional charges appear on the students ledger card, and the institution expects to be paid for them. Cost of attendance allowances (non-institutional costs) such as room, board, and travel do not appear on the students ledger card, but they are funded in the FA package.
Net Funding Scheduled	The Net Funding Scheduled is Net Need Based Aid Packaged plus Cash/Other Packaged. This amount will not include interest from cash plans.
Cash	This is the total of other funding sources paid directly to the student. This amount is the total paid for Cash plans and includes the interest. It is display only and not used in the top-down math to determine the Remaining Balance to Schedule.

Field	Description
Stipends	The Stipends Scheduled is the total calculated by CampusNexus Student of all stipends for the student in the Academic Year being packaged. CampusNexus Student adds this total to the Remaining Balance to Schedule.
Remaining Balance to Schedule (RBS)	This is Institutional Charges minus Net Funding Scheduled. • If this amount is greater than zero, additional funding may be necessary. • If this amount is zero, institutional charges have been covered by the package. • If this amount is less than zero, a stipend may be scheduled to return the over packaged amount to the student to cover allowances for room, board, travel, and so on. The EFC used in the remaining balance to schedule formula is the Alternate EFC that corresponds to the number of months in the students academic year. • If the number of months is nine, the EFC will be the Pell Paid EFC. • If the number of months is not nine, the applicable alternate EFC will be used. Loan amounts used in calculating the remaining balance to schedule are principal-only.
EFC Override	Use the EFC Override field to enter a new Expected Family Contribution (EFC) value to be used in the remaining balance to schedule and auto-packaging functions. CampusNexus Student previously required you to submit a correction to change an EFC. Some situations result in a need to change the EFC without requesting a new ISIR. This EFC Override is incorporated in several reports when the value of the setup flag is not null. The FAFSA calculation prompts the user to store the EFC Override if the setup option is Yes. See Financial Aid General Setup for more information about this feature.
Pell Paid EFC	This is the primary or secondary Expected Family Contribution calculated from the FAFSA data based on a nine-month academic year. **Note**: This field is labeled 'Recalc. EFC' instead of 'Pell Paid EFC' if financial aid advisors have chosen to award students with a recalculated EFC before the official ISIR has been received. This function works under the following conditions: • Awards must be in an Estimated status. If the award is in an Approved status, financial aid advisors must manually change the Approved status to an Estimated status before using this function. No changes can be made to estimated financial aid awards after any financial aid disbursements have been paid. • The Campus setup flag Award Students with ISIRs Only (in Setup > Financial Aid > Campus Locations > Campus (Edit/Add) > Financial Aid tab) has NOT been checked. • The Campus setup flag Award Students with Recalculated EFC (in Setup > Financial Aid > Campus Locations > Campus (Edit/Add function) > Financial Aid tab) HAS been selected.
Sec EFC	Secondary EFC, also calculated from the FAFSA.
Auto Zero EFC	This box will be selected if the student qualifies for an automatic zero EFC.

Field	Description
FAFSA Entered	This is the date that the FAFSA was entered in CampusNexus Student.
ISIR Received	The date that the ISIR was received from CPS.
FAFSA to CPS	The date that the FAFSA was sent to the Central Processing System (CPS) of the Department of Education.
Model	This is dependency status of the student is used in calculating Pell grants and arranging loans. The options are Dependent, Independent, and Undetermined. **Note**: If a student does not have a FAFSA or ISIR on file and has an Undetermined dependency status/model, you can assign the student with a Dependent status/model when packaging a FFEL or Direct parent PLUS loan. In this scenario the model will be Dependent*.
1st Time Borrower	This is carried over from the Academic Year form and indicates that the student is a first-time borrower. Loan disbursements will be held back by the number of days indicated in the Financial Aid Settings.
ISIR ID Being Paid On	The ID of the ISIR for which Pell is being paid. If a student has more than one ISIR on file for the designated award year, you can select the ISIR ID that the Pell grant will be paid on. This field is not always enabled. This field is read-only if either of the following conditions is true: • The student's Pell Origination Status is equal to A or B. - OR - • A Pell Grant is packaged for the designated award year, and at least one disbursement record in the schedule has a status of P or R. If neither of the above conditions is true, and the ISIR ID being paid on is enabled, the following edit logic will apply: • Does the student have more than one ISIR on file for the designated award year? If more than one record does exist for the student, a list will be provided. The list will list one record for each ISIR on file for the student. CampusNexus Student displays the Transaction ID for each record in the ISIR table for the student. The default value in the ISIR ID being paid field is the contents of the Student Pell Transaction ID. If you select a different ISIR ID to pay on and click Save, several columns in Student Pell table are updated. (A Save button has been added on this section of the form.) If you edit the verification status or the ISIR ID Being Paid On field, the Save button will be enabled.

Field	Description
Verification Status	This function enables you to update a students verification status manually. For additional information on verification status, and functions within CampusNexus Student to perform automated updates, see Verification. Select the verification status of the FAFSA/ISIR. The options are: • Blank: Not Selected and not verified • S: Selected, Not Verified • V: Verified • W: Without Documentation. The ISIR import procedure sets an ISIR selected for verification to Selected, Not Verified and an ISIR not selected to blank. The Pell origination extract procedure rejects a record with a verification status of Selected, Not Verified. This forces the user to make an appropriate selection. The Department of Education has defined Blank, Verified, or Without Documentation as the only valid codes. However, institutions will lose the ability to determine and locate students selected for verification if all ISIRs are set to a BLANK Verification status on Import, as there will be no traceability to an ISIR selected for Verification. The use of an S, although not valid on the origination extract, requires institutions to address and manage the verification status for those students selected prior to extracting a Pell Origination. (Since CampusNexus Student has always maintained the origination status on Import as Selected or Not selected, the absence of a code to define these selections we felt cr eated a hardship on the FA officers ability to manage the verification status. Using the DOE codes, we would have had to map all ISIRs to Blank, because we could not state that ALL ISIRs Not selected were Verified). See also ISIR Received and Verification.
Student Identifier	The blue text is a display of the student identifier.
Children of Fallen Heroes Eligible	Pell eligible students are eligible to receive a maximum Pell Grant award for their current award year if their parent or guardian died in the line of duty working as a public safety officer (a police officer or firefighter). To qualify for this grant, the student must be eligible for a Pell grant, have a Pell eligible Expected Family Contribution (EFC), and be less than 24 years of age or enrolled at a higher education institution at the time of the death of their parent or guardian. A student's eligibility for the scholarship thereby automatically reduces their packaged EFC to zero. Once a CampusNexus Student user has confirmed that a student is eligible for the Children of Fallen Heroes scholarship, select this CFH check box (only applicable for award year 2018-2019 or higher). An informational message is then displayed, letting the user know that CampusNexus Student is using an EFC of 0 to determine award amounts. The packaged EFC will be displayed as 0 in the Remaining Need grid. Note: If schools are packaging non-Title IV awards that utilize the EFC in the calculations, they will have to calculate those manually for the student's normal EFC. Also note that if there is no ISIR ID being paid on, then the CFH check box is still displayed but not enabled.

Field	Description
Career Pathway Alternative Pell	Financial Aid Administrators can select this check box to properly package and award a student's financial aid when they are eligible to receive a Career Pathway Alternative Pell Grant. The Limited Pell Grant has a maximum amount of $4,860 for the 2015-2016 award year. The Career Pathway Alternative Pell Grant Disbursement Schedules use the same maximum Pell Grant eligible expected family contribution (EFC) that was used to develop the Regular Federal Pell Grant Payment and Disbursement Schedules. Once the student's annual award amount is determined using the Career Pathway Alternative Pell Grant Disbursement Schedules, all other Pell funding calculations are the same as those used for Regular Pell Grant awards, but based on the Career Pathway Alternative Pell Grant Disbursement Schedules. Calculation of the grant is based on the student's full Scheduled Award under the Regular Federal Pell Grant Payment Schedule. **Note**: This check box is only visible on the form if the student has an ATB value (ATB code 12 or 14) populated for their Previous Education (Admissions>Education>Previous Education).
Unsupported Dependent	Financial Aid Administrators may use Professional Judgment by selecting this check box to authorize a FFEL or Direct Unsubsidized Stafford loan (in the selected award year), to a dependent student when that student's parent or parents have stopped providing financial support for the student and refuse to provide information on a FAFSA. The application creates and maintains an audit record that indicates the authorized user who selected the Unsupported Dependent check box to a student based on the Professional Judgment decision. **Note**: This check box is only visible on the form if the ISIR associated with the students Academic Year qualifies the student as eligible for a Professional Judgment decision. ISIR reject codes that are eligible are **15** plus any combination including the following: E, F, J, K, S, T, 2, 6, 7, 9, 10, and 12. In addition, this check box may be visible, but disabled, if the student has an ISIR
Rejected	Rejected indicated on the form, with reject codes that do not meet the Professional Judgment decision criteria.
Save	Click Save to save changes if you edit Verification Status or ISIR ID Being Paid On. If you change either, the Save button is enabled.
Cancel	Click Cancel to cancel changes if you edit Verification Status or ISIR ID Being Paid On. If you change either, the Cancel button is enabled.
FAFSA	Click FAFSA to complete a Free Application for Federal Student Aid. A FAFSA must be on file and calculated in CampusNexus Student for most financial aid packaging functions to work.
ISIR	Click ISIR to see a list of ISIRs on file for the student and to print the students ISIR

Need Analysis Packaging

The purpose of the upper grid is for calculating Remaining Need as aid is added to the student's package to help you determine when a student is fully packaged for an Academic Year. It is organized in a top-down math format giving a summary view of the gross amounts packaged. The logic uses a disbursement-level summation of gross amounts, since an award could have one disbursement in one academic year and another disbursement in the subsequent academic year.

The system also allows for Estimated Family Contribution (EFC) replacement which is used when a student with an EFC has Direct Subsidized loans or Campus-Based aid as part of the student's package. The 'EFC replacement and Aid Offset' field will dis-

play amounts from fund source types that can replace EFC which are greater than Initial Unmet need. This will allow the top-down math to not present the student as over packaged once the total package amount exceeds the Initial Unmet Need.

Additionally, when a student with an EFC has no Direct Sub Loans or Campus-Based aid, the 'EFC replacement and Aid Offset' field will display amounts from Non-Need Based aid in the student package that are greater than Initial Unmet Need. This will allow the top-down math to not present the student as over packaged once the total packaged amount exceeds the Initial Unmet Need.

Packaging Configuration:

- Limit Awards to COA: The total gross amounts for the disbursements (minus refunds) in the Academic Year will not exceed the COA.
- Add Bank Fees to the COA when packaging loans: When set to Yes, the COA is increased by the amount of the bank fees when the award is saved. Note that the loan being packaged is the award that would meet the COA, the COA will still be increased by the amount of the fees when the award is added. The total amount of the loan could then again be increased or other aid added for the increased COA amount.

Campus-Based Aid:

- SEOG
- Work Study

Categorizing the Fund Sources

Fund Source	Type	Details
PELL	Need Based	No restrictions within Packaging
Adheres to Need (Include Pell with all packaged awards when validating amounts)		
DIRSUB	Need Based	Adheres to Need
SUB	Need Based	Adheres to Need
LOANNB	Need Based	Adheres to Need
GRANT (other than Pell NB (SEOG))	Campus Based	Adheres to Need
WORKST	Campus Based	Adheres to Need
OTHER NB	Need Based	Adheres to Need
SCHOLAR NB	Need Based	Adheres to Need
Replaces EFC (Total of these amounts over EFC is considered EFA and reduces need)		
DIRPLUS	Replaces EFC	Adheres to COA
PLUS	Replaces EFC	Adheres to COA
DIRUNSUB	Replaces EFC	Adheres to COA
UNSUB	Replaces EFC	Adheres to COA

Fund Source	Type	Details
TEACH	Replaces EFC	Adheres to COA
LOANNNB	Replaces EFC	Adheres to COA (Flag for Exclude from EFA removes it from Need analysis and package to COA validation)
Conditional Aid (EFA if SUB, SEOG, Work Study are in the package, then amounts from these adhere to Need. Otherwise, they are COA)		
OTHER NNB		Conditional (Flag for Exclude from EFA removes it from Need analysis and package to COA validation)
SCHOLAR NNB		Conditional
Grant (other than Pell NNB)		Conditional
Not Included in EFA or Need Analysis		
IASG		
Other		
CASH		
Retired		
PERKINS		Retired
ACG		Retired
Smart		Retired

Dependent Student without a FAFSA or ISIR on file

When a student does not have a FAFSA or ISIR on file and has an Undetermined dependency status, the FA Officer is prompted to assign the student with a Dependent status when packaging Direct Parent PLUS Loans. When the student's dependency status is set to Dependent, CampusNexus Student updates the student's record, allowing the Financial Aid Officer to proceed as normal and package the Direct Parent PLUS award.

After a parent PLUS Loan has been awarded on a student, CampusNexus Student validates the dependency status/model for the student upon saving the award. If there is a discrepancy between the manually updated Dependency status/model and the Dependency status/model from an FAFSA or ISIR on file, a validation message alerts the FA Officer of the conflict. The FA Officer can resolve this conflict by refunding and canceling any remaining scheduled payments, canceling the award, or correcting the FAFSA or ISIR to a Dependent status/model.

Note: The Federal Parent PLUS Dependency Status Conflicts report can display the student details if there is a dependency conflict.

NSLDS

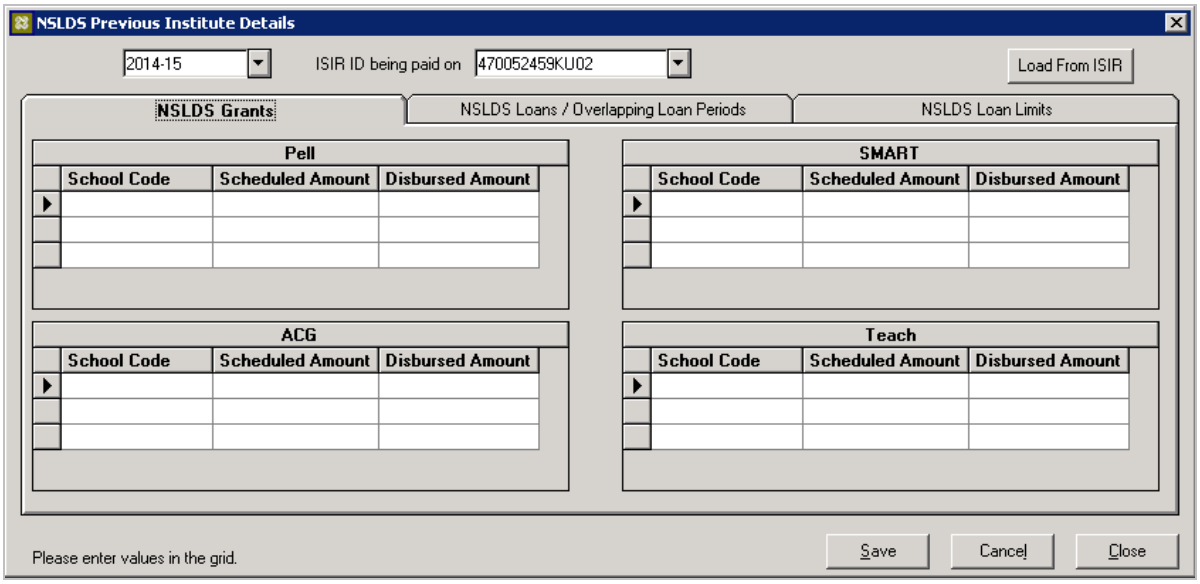
The National Student Loan Data System (NSLDS) maintains a history of Title IV aid awarded to students nationally. This data is shared with CPS, which then populates the student awards in the NSLDS section of the ISIR.

Note: Reject 24 for the NSLDS Fraud Loan Flag was added to the Complete Reject Edits section. This reject was implemented on January 2, 2014 for the 2013-2014 and 2014-2015 award years.

The NSLDS Subsidized Loan Eligibility Used Field (position 445) provides the total time during which the student has received Direct Subsidized Loans as of the date of the ISIR; it does not include the total time during which the student has received Direct Subsidized Loans while enrolled in a non-credential teacher certification program. In general, applicants may not receive Direct Subsidized Loans for more than 150% of the published length of the program in which they are currently enrolled. This field contains numeric six-digit values, 000v000 to 999v999, where "v" is an implied decimal and is excluded from the output.

The 2014-15 ISIR Summary Report also includes the new Subsidized Usage Limit Applies (SULA) Flag (where the valid values are Y or N). This flag will be viewed for all Academic Years but will only be populated for 2014-15 and higher.

Click **NSLDS** to view and edit the NSLDS Previous Institute Details form.



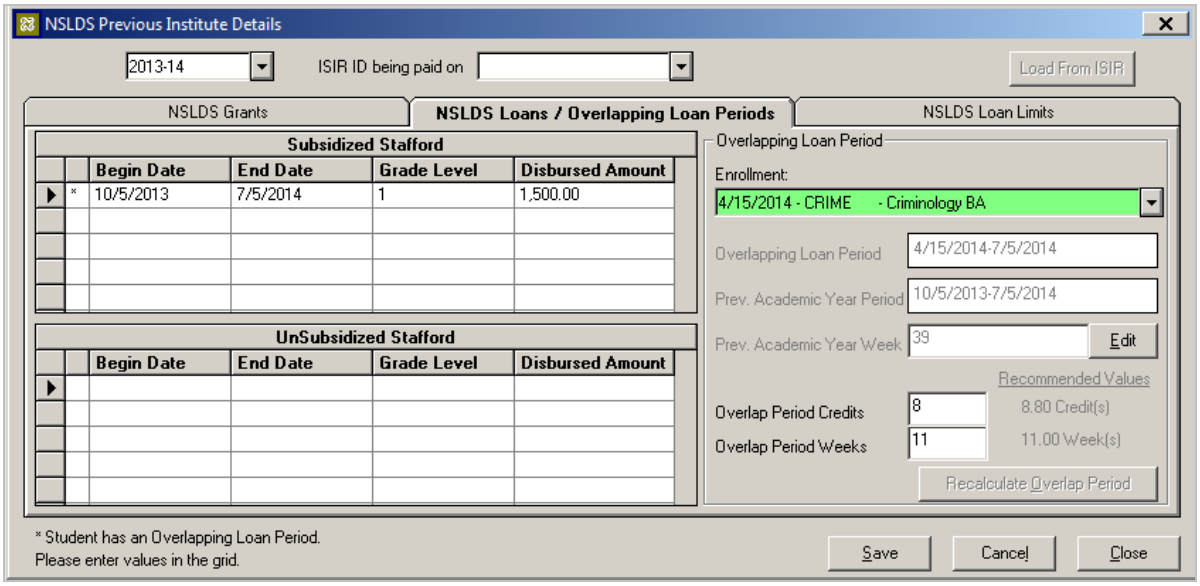
The NSLDS Previous Institute Details form loads certain data elements contained in the NSLDS section of the ISIR record (for example, previous loans or awards paid to the student) based on the selected student, award year, and transaction ID. The purpose of this form is to ensure that regulations related to overlapping loans and Title IV grants paid at a prior institution can be captured in CampusNexus Student and considered when awarding Title IV aid.

- **Award Year**: Displays the applicable year for the award. The Award Year is based on the academic year sequence selected on the Financial Aid Packaging form.
- **ISIR ID being paid on**: Displays the transaction ID of the ISIR for which the grants are being paid. If a student has more than one ISIR on file for the designated award year, the box displays the available transaction IDs.
- **Load from ISIR**: Loads values based on the selected award year and transaction ID. The Loan from ISIR button is disabled if the transaction ID is blank.
- **Grants tab**: This tab displays the award details (School Code, Scheduled Amount, and Disbursed Amount) for applicable, available awards.

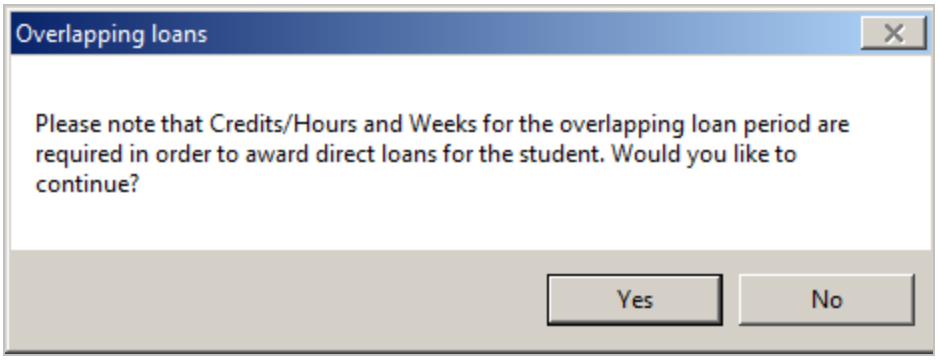
Enter appropriate values and click **Save** to update the database with the latest data.

NSLDS Loans / Overlapping Loan Periods tab

This tab displays details (Begin Date, End Date, Grade Level, and Disbursed Amount) for subsidized and unsubsidized Stafford loans that have loan periods which overlap the current academic year sequence on the Financial Aid Packaging form.



If a student has overlapping loan periods, and the overlapping loan period feature is enabled (under the Financial Aid tab of the Campus Locations Setup), then when you click Save without populating the Overlap Period Credit and the Overlap Period Week-s,CampusNexus Student alerts you that overlapping loan period exists and that the credits/hours and weeks for the overlapping loan period are required to award direct loans for the overlapping period.



Click **Yes** to continue.

Based on the overlapping loan period information and transferred credits/hours from the prior loan period, CampusNexus Student calculates and recommends default values for credits/hours and weeks for the stub loan period as follows:

a. If the student has approved transfer credits from the prior loan period, CampusNexus Student subtracts transfer credits from the full academic year definition of the program to obtain the credits/hours for the stub loan period. The number of weeks is calculated based on the date range of the overlapping loan period.

b. If the student has no approved transfer credits from the prior loan period, CampusNexus Student prorates by first using the date range of the overlapping period to determine the number of weeks (normal rounding) in the stub loan period. Next, CampusNexus Student uses the number of weeks in the stub loan period and the full academic year definition to prorate the credits/hours for the stub loan period (rounding to 2 decimal places).

For more information, see Packaging for Overlapping Loans.

Click **Recalculate Overlap Period** after you specify values in the Overlap Period Credits or Overlap Period Weeks fields. CampusNexus Student uses the values from these fields to calculate loan periods when loan periods are added in the Awards folder on the Loan Period form. The Awards folder displays a message that an overlapping loan period exists for the academic year.

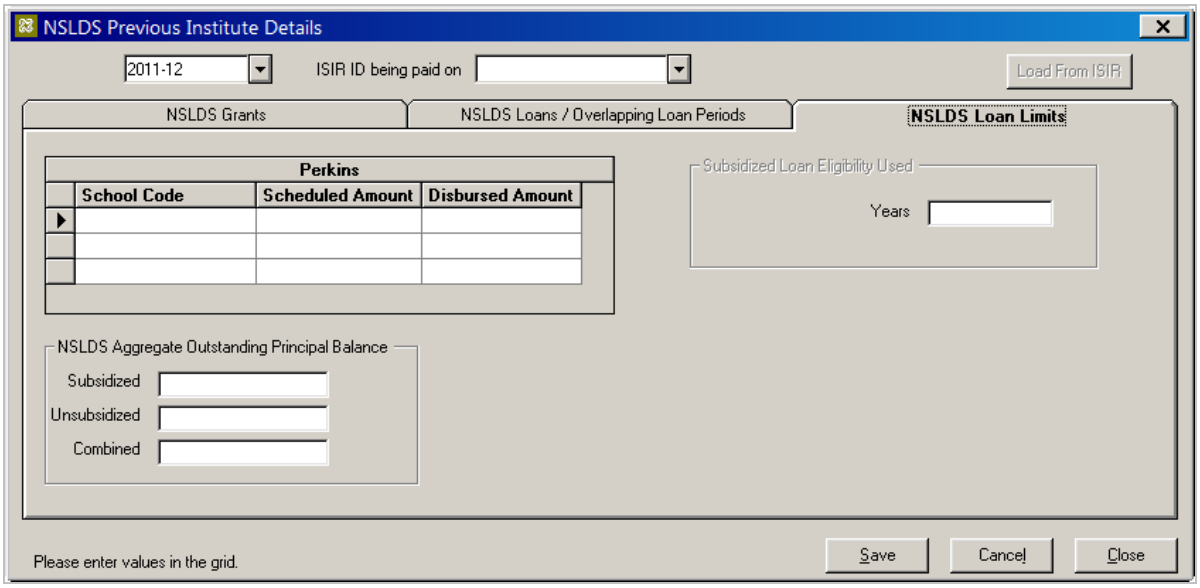
When a stub loan period is not yet completed, updating the credits/hours or weeks attribute of the overlapping period will cause the SPE tool to reevaluate the progress of all the loan periods. This means when you update the credits/hours or weeks of the overlap period on the NSLDS form and if loan periods exist for the enrollment, CampusNexus Student checks whether the stub loan period is completed.

- If the stub loan period is not completed, the following message is displayed: "*Loan period(s) exist for this enrollment. The existing overlapping loan period will be updated with the new credits/hours and weeks attributes and progress of all loan periods will be reevaluated as a result of this change. Would you like to continue?*" Click **Yes** to update the attributes on the stub loan period as well as attributes of the LPP > Reevaluate the Schedule complete flags of the loan periods and put the student through AY/LP adjust queue to be evaluated. Click **No** to cancel the change.
- If the stub loan period is completed, the following message is displayed: "*Loan period(s) exist for this enrollment and the existing overlapping loan period has been completed. Changes to the credits/hours or weeks attributes of the overlap period are not allowed.*" Click **OK**. The original values are restored.

Specify appropriate values and click **Save** to update the database with the latest data.

NSLDS Loan Limits tab

This tab enforces the annual and aggregate loan limits defined by the Department of Education for Stafford loans. Use this tab to limit a student's loan based on the appropriate aggregate loan limit when packaging Stafford loans. The aggregate loan limits are affected by dependency status; whether a borrower is an undergraduate, graduate, or professional student; or has increased eligibility allowed for health-profession students.



- Under **Perkins**, enter or edit the appropriate values for School Code, Scheduled Amount, and Disbursed Amount. The Perkins table relates to the grants applicable to the student, in addition to Pell, SMART, ACG, and Teach grants.
- Under **NSLDS Aggregate Outstanding Principal Balance**, if applicable, enter the values to specify the aggregate loan limit for Stafford loans:

- **Subsidized**: value of unsubsidized Stafford loan applicable to the student. If the value exists in the FANSLDS database, it is loaded.
- **Unsubsidized**: value of unsubsidized Stafford loan applicable to the student. If the value exists in the FANSLDS database, it is loaded.
- **Combined**: combined value of the subsidized and unsubsidized loan balance applicable to the student. If the value exists in the FANSLDS database, it is loaded.

- Under **Subsidized Loan Eligibility Used**, enter the appropriate number of years (whole numbers only). This field is available on 2014-15 ISIRs and forward.

Click **Save** or **Close** to return to the Financial Aid Packaging form.

On the Financial Aid Packaging form, click **Add Activity** to add an activity in Contact Manager.

FA History: This command is not used at this time.

Click **Stipends** to set up a stipend schedule for the student based on funds awarded in this academic year. (See View > Student Accounts > Stipend Schedule.)

Click **Print** to print a Budget Worksheet report. The report contains all the information included on the packaging form.

Add ACG/Edit ACG: One eligibility requirement for the new ACG grant is that a student must have completed a rigorous course of study. There are three Eligibility/Payment Reason Codes that must be submitted to COD that satisfy that requirement:

- 01 = Rigorous High School Program
- 02 = Advanced Placement/International Baccalaureate
- 03 = Coursework

If *01 Rigorous High School Program* is selected as the Eligibility/Payment Reason Code, a code for one of the Rigorous Secondary (High) School Programs of Study approved by the U.S. Department of Education must also be submitted in the COD Common Record. CampusNexus Student maintains these Rigorous Secondary (High) School Programs of Study and provides customers with a method of selecting one of the three Eligibility/Payment Reasons for students who qualify for ACG funding in their financial aid package.

This configuration is optional since not all students will be awarded ACG grants. Navigate to the Packaging form. If a student attended an (ACG) eligible HS Program, a button labeled 'Add ACG' is displayed. When the 'Add ACG' button is selected, CampusNexus Student presents the Education form, which contains a section entitled 'Rigorous High School Program'.

Note: If award year 2011-12 is selected, the Add ACG button is disabled.

Select 'ACG Eligible' to enable the Reason Code list. If the '01 Rigorous High School Program' reason code is selected, the State and Eligible Programs lists become enabled and may be selected. Then select a state and eligible program for the state selected.

When the selections are saved, CampusNexus Student returns the user to the Financial Aid Packaging form. The Add ACG button is now displayed as Edit ACG, so that you can modify the selections if necessary.

Admissions staff members can view the Eligibility/Payment Reason Code information by navigating to the Education form. This is the same Education screen that was invoked from the Packaging form above.

Deleting Pell

You can delete a Pell award only if the origination status is N - Not Ready to Send or E - Rejected status. If it is any other status, CampusNexus Student displays the message "*Origination must be a status of 'Not Ready to Send' or 'Rejected' to delete.*" If the origination status is E and the deletion is allowed, the origination status is set to N on the student Pell record related to the award year.

Half License Units

A program code in Financial Aid Packaging (frmFaStudAcadYears) disallows packaging for programs that are "half" license units. Program versions are marked as "Full License Units" or "Half License Units" on the program version setup form.

Packaging Forms

CampusNexus Student provides two Financial Aid Packaging forms:

- One is accessed by navigating to **View > Financial Aid > Packaging**. See Packaging.
- The other by clicking **Package** on the Financial Aid Academic Year form. See Academic Year Form.

Title IV Payment Periods

Establishing Title IV Payment Periods

A payment period consists of two attributes: length of time and number of credits or hours. Programs whose academic calendars are configured to be *Non-Standard Term*, *Clock Hour*, or *Credit Hours without Terms* are eligible for two Title IV payment periods per academic year. CampusNexus Student automatically builds Title IV payment periods upon student enrollment.

Note: *Non-Standard Term* is a conditional academic calendar as defined below.

Department of Education Guidelines

Programs are **no longer allowed** to have more than the defined two payment periods in the lesser of the program, the academic year, or the remainder of the program. You can make multiple disbursements within a single payment period; however, making multiple disbursements within a payment period does not create a new or additional payment period.

Non-Title IV awards can be configured to use Title IV payment periods, use a separate set of non-term payment periods, or not use payment periods at all. The configuration is found under **Lists > Financial Aid > Programs > Program Version > Non-term Payment Period (tab)**. This tab is available for *Clock Hour* and *Credit Hours without Terms* programs.

Programs with an academic calendar of *Non-Standard Term* are evaluated and treated differently than *Clock Hour* and *Credit Hours without Terms*. *Non-Standard Term* programs only receive payment periods for awards that are Title IV loans where the academic terms that comprise the academic year differ in length by 14 days or more. Payment periods are not created for any other award types, or where the academic terms that comprise the academic year differ by 13 days or less.

Note: We recommend configuring term sequencing for *Non-Standard Term* program versions so that the exact terms are known when CampusNexus Student performs the week's comparison to determine if payment periods are needed during academic year creation.

CampusNexus Student creates payment periods using the following logic:

1. Upon enrollment, *Clock Hour* or *Credit Hours without Terms* programs receive two Title IV payment periods. *Non-Standard Term* where the academic years meet the criteria also receive two Title IV payment periods.
2. The program version start date is the beginning point for calculating academic year and payment periods for non-term programs. If the program version start date is NULL, CampusNexus Student uses the expected start date.
3. The weeks and credits that are defined on the AY are divided by 2 and those numbers are assigned to each payment period. *Example*: 36 credits/32 week AY produce two payment periods of 18 credits/16 weeks. The start date is set to the start date of the AY. The end date for payment period 1 is obtained by adding the weeks attributed to the start date of the payment period.

Note: If a partial AY exists and is less than half of a full AY, only one payment period should be created. *Example*: A full AY is 36 credits/32 weeks, and the program contains AY 2, which is 16 credits and 12 weeks since it is less than half of a full AY).

Once Title IV payment periods have been associated with students' academic years, they can be accessed by navigating to **View > Financial Aid > Academic Year** and selecting the Payment Period button. A user with permissions can add, edit, or remove payment periods as needed. Payment period dates can be viewed and the association with the disbursement can be changed within each award detail from **View > Financial Aid > Awards > Edit**.

While non-Title IV awards can be scheduled in Title IV payment periods, Title IV awards cannot be scheduled in non-Title IV payment periods. Furthermore, CampusNexus Student prevents administrators from removing both Title IV payment periods; at least one Title IV payment period must remain for each student. Payment periods cannot be removed if disbursements within the payment period have already been paid.

Updating Academic Year, Payment Period, and Disbursement Date

CampusNexus Student automatically updates the academic year, payment period, and disbursement dates as students progress through non-term based programs, i.e., programs configured with an academic calendar of *Non-Standard Term*, *Clock Hour*, or *Credit Hours without Terms*.

Per Federal Student Aid standards, students enrolled in non-term and clock hour programs must not progress to their subsequent academic year until they have successfully completed the required number of clock hours or credits for each academic year within their program of study. For example, if a student is enrolled in a 48 credit semester non-term program with an academic year defined as 24 credits, the student does not progress to the second academic year until successfully completing 24 credits. If the student was originally scheduled to complete the first academic year on April 5, 2008, for a program that started on September 1, 2007, and the student had successfully completed only 20 credits because of failing one four-semester credit course, the student would remain in the first academic year until successfully retaking and passing the failed course.

Prior to this automation, financial aid administrators were required to evaluate each student's progress and determine if they were eligible for the subsequent academic year. If they were not eligible, academic year end dates were manually extended, and the subsequent academic year begin and end dates were adjusted manually. In addition, scheduled disbursements also required manual adjustments any time academic year dates were adjusted.

The automatic updating capability alleviates the need to manually manage the process of academic year eligibility based on academic progress. The Student Pace Evaluation (SPE) tool assesses students' rate of academic progress and adjusts externship and expected graduation dates accordingly. The tool also assesses students enrolled in non-term based programs and determines their eligibility to advance to the subsequent payment period and academic year based on their rate of academic progress.

When students are eligible for their subsequent payment period, nothing happens. When students are not eligible for their subsequent payment period, CampusNexus Student modifies the students' existing payment period and academic year. The logic that is used to determine the adjustment is explained in the following section.

Title IV Payment Period Adjustment

The payment periods are adjusted by the Student Pace Evaluation (SPE) tool or a scheduled job using the attributes (Credits/Weeks or Hours/Weeks) defined on each student’s individual payment periods and based on the following logic:

The start date of the first payment period is always set to the start date of the first course registered on the schedule. The end date of the first payment period is set to the end date of the course that completes the credits or hours in the payment period if the weeks requirement for that payment period has been met. If the weeks requirement for that payment period has not been met, the end date of the payment period is set to the date that completes the weeks that are required.

If the student has a class in a current status, payment period 2 starts the day after payment period one ends. If not, payment period 2 begins on the day of the next class registered on the student schedule. The end date of the second payment period is set to the end date of the course that completes the credits or hours in the payment period if the weeks requirement for that payment period has been met. If the weeks requirement for that payment period has not been met, the end date of payment period is set to the date that completes the weeks that are required.

Note: If Global is configured as the servicer, the start date of all payment periods will be the day after the prior payment period ends. This is to make sure that the disbursements do not fall between any payment period dates and that a payment period ID is always assigned.

Disbursements: All disbursements associated with a payment period remain within that payment period. If the payment period dates are adjusted such that the disbursement would not fall within the payment period, the disbursement date will be changed to the first day of the payment period.

AY dates: The adjustment logic aligns Academic Year dates to the payment period dates. The start date of academic year 1 is set to the start date of payment period one. The end date of academic year 1 is set to the end date of payment period two. This logic is repeated for all AYs. The graduation date is set to the end date of the course that completes the credits in the program. Disbursements that are set to be processed by Global are not updated with this logic. Any changes made to the disbursement, payment period or academic year dates are audited within the Audit form. Automated updates made by the system are designated with an "automated" user name within the audit record. To view audit records, navigate to **View > Financial Aid > Audit**.

Transfer of credits may accelerate program completion. The logic factors in transfers of credits and decreases the expected graduation date, if applicable, as well as a student's last academic year and payment period. Any scheduled disbursements that are affected by the decrease in academic year length are adjusted to remain within its payment period and academic year dates.

When transfers of credits are applied to students, enrollment officers may synchronize the students' expected graduation dates with the logic of this feature at the time of student enrollment. Once these dates are synchronized during enrollment, the new dates will replace the expected graduation dates that are defined as a result of the program version configuration.

Configuring and Using this Feature

The Title IV payment period creation portion of this feature is effective any time students are enrolled in programs with an academic calendar of *Clock Hour* or *Credit Hours without Terms*. Programs configured as *Non-Standard Terms* apply payment periods for Title IV loans where the academic terms are greater than 14 days. This function occurs automatically for programs configured with those academic calendars as long as "Do Not Use Payment Periods" is not selected under **Lists > Financial Aid > Programs > Program Versions**.

The automated updates for academic year, payment period, and disbursement dates portion of this feature is available as an add-on process which can be installed by a system administrator. Once installed, this feature processes updates without human intervention according to the routine schedule which is defined during installation. To view the automated updates, navigate to **View > Financial Aid > Audit**.

This feature is also available in the Student Pace Evaluation (SPE) tool, which can be accessed by navigating to **Tools > Academic Records > Student Pace Evaluation**. Note that any changes made manually (or with the SPE tool) will be replaced by the automated routine, unless "Exclude from Auto Adjustment" is selected on the Payment Period form.

Packaging for Overlapping Loans

Note: As of CampusNexus Student 15.0, this feature is available for clock hour and non-term programs only.

If a student who enrolls in a clock hour or non-term program after having taken out a loan at another school with an academic year that overlaps the academic year at the second school, the new school may originate a loan for the remaining portion of the program or academic year if the period of enrollment for the loan at the first school overlaps the period of enrollment at the new school. The loan at the new school may not exceed the remaining balance of the student's loan limit at the new school, after the disbursements at the first school are taken into account. The new school may originate a loan for the remaining portion of the program or academic year regardless of whether the new school accepts transfer credits/hours from the prior school.

To use the overlapping loan period feature, the school must activate this feature under the Financial Aid tab of the Campus Locations Setup.

CampusNexus Student can award students when they have overlapping loans by automatically creating the appropriate loan periods and loan payment periods when a direct loan (DIRSUB, DIRUNSUB, DIRPLUS) is added. In addition, financial aid packaging functionality recognizes overlapping periods for awarding. Direct loans eligibility in the first loan period (overlapping loan period) is determined by subtracting the amount received in the prior loan period from the student maximum eligibility in the current loan period. This logic is applicable to all packaging methods (manual packaging, Auto Packaging, and Batch Packaging).

To be eligible to be packaged for the overlapping loan period (stub loan period), the student must meet the following criteria:

- An overlapping loan period exists for the current enrollment. CampusNexus Student uses the NSLDS data from the student's ISIR to determine whether an overlapping loan period exists. This can be confirmed through the NSLDS Previous Institute Details form.
- The number of Credits/Hours attribute and the number of Instructional Weeks attribute for the overlapping loan period must be specified through the NSLDS Previous Institute Details form.

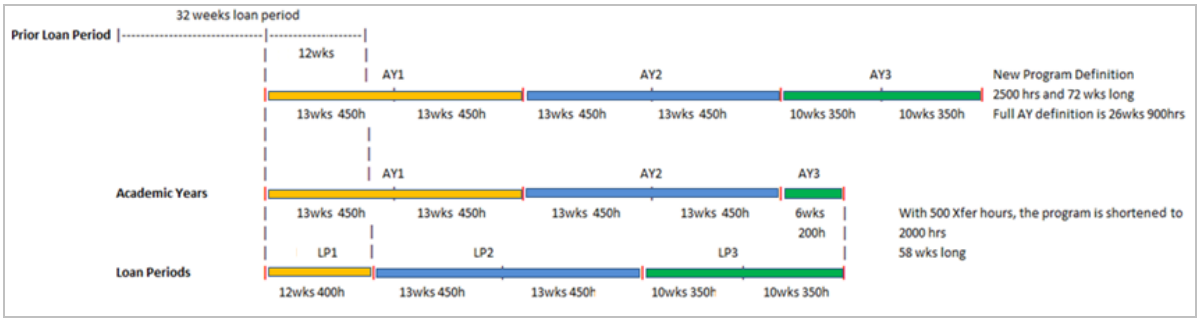
In compliance with the regulations specified in the student FSA handbook, CampusNexus Student packages overlapping direct loans regardless of whether the student has transfer hours/credits from the prior loan period. Also, CampusNexus Student does not use completed credits/hours and weeks as criteria when approving direct loan disbursements associated with the stub loan period. For more information, see Approve Disbursements to Pay.

For schools that wish to use this overlapping loan feature, it is highly recommended that best practices be in place to ensure that student's NSLDS data and approved transfer hours/credits are entered before creating loan periods for the student. This ensures that the student loan periods are created correctly. If transfer hours/credits or NSLDS data are entered after the loan periods have been created, the loan periods may have to be rebuilt and the student needs to be repackaged accordingly.

Note: Loan periods and loan payment periods are created only if the program version is configured to use payment period. Refer to the FA Program Code Setup for details.

Overlapping Loan Example

The diagram below illustrates the Academic Years and Loan Periods in CampusNexus Student for a clock hour student who has an overlapping loan period.



The student enrolled at school A and received a direct loan with a loan period of 32 weeks. The student withdrew from school A before the loan period was over and refund calculation was carried out at school A. The student then enrolled at school B before

the loan period at school A was over. The new program at school B consists of 2500 hours and 72 weeks. The full Academic Year definition at school B is 900 hours and 26 weeks. School B also accepts 500 transfer hours from school A. All 500 transfer hours are from transfer courses that were completed within the prior loan period at school A.

As a result of the transfer hours, the student's last Academic Year in the program at school B is reduced by 500 hours. The program is reduced to 2000 hours and 58 weeks. This student is eligible to be packaged for overlapping loans. The first loan period is the stub loan period in which school B would certify a loan for the remaining balance of the annual loan limit for the period that covers the remaining portion of the loan period at school A. Loan periods for the student will be created as follows:

- The first loan period is the overlapping period (stub loan period). The required clock hours and weeks attributes in this first loan period are the values entered through the NSLDS Previous Institute Details form. For this scenario, based on the transferred credits and the date range of the overlapping loan period, the loan officer entered 400 hours and 12 weeks the student is expected to complete for the stub loan period. The BBAY dates on the stub loan period will reflect the original loan period at school A and are displayed within the NSLDS information. If the loan period at the prior institution is less than 30 weeks, the BBAY start date will be calculated to ensure the loan period is at least 30 weeks.

  Note: Transfer credits/hours are only used as a reference to calculate the recommended hours/credits for the stub loan period. These recommended values are displayed in the "NSLDS Loans / Overlapping Loan Periods" tab of the NSLDS Previous Institute Details form. The appropriate credits/hours and weeks for the stub loan period must be entered by the loan officer based on the school's business model.

- Subsequent loan periods are created based on the remaining hours and the full Academic Year definition of the program.

Packaging Overlapping Loans

Financial Aid packaging continues to be Academic Year based. For Auto Packaging and Batch Packaging using auto packaging, CampusNexus Student correctly packages direct loans for each loan period within the Academic Year to satisfy the need in that Academic Year.

Budget for each loan period is prorated based on the budget of the Academic Year(s) that encompass the loan period. Each charge (TUIT, Books/Supplies…) will be calculated separately. Prorating is based on weeks if the Program Version is configured to prorate costs using weeks. Prorating is based on credits/hours if Program Version is configured to prorate costs using credits/hours. This configuration is found under Lists > Financial Aid > Programs. Below is a sample calculation using the previous overlapping loan example:

- AY1 Tuition is $10,000
- AY2 Tuition is $12,000
- AY3 Tuition is $5,000

All 12 weeks of LP1 are within AY1. Therefore, Tuition for LP1 is calculated as follows:

- ($10,000/26 weeks) * 12 weeks = $4,615

14 weeks of LP2 overlap AY1 and 12 weeks of LP2 overlap AY2. Therefore, Tuition for LP2 is calculated as follows:

- Tuition from AY1 = ($10,000/26 weeks) * 14 weeks = $5,385
- Tuition from AY2 = ($12,000/26 weeks) * 12 weeks = $5,538
- Tuition for LP2 = $5,385 + $5,538 = $10,923

14 weeks of LP3 overlap AY2 and 6 weeks of LP3 overlap AY3. Therefore, Tuition for LP3 is calculated as follows:

- Tuition from AY2 = ($12,000/26 weeks) * 14 weeks = $6,462
- Tuition from AY3 = ($5,000/6 weeks) * 6 weeks = $5,000
- Tuition for LP2 = $6,462 + $5,000 = $10,538

Note: This example illustrates prorating based on weeks. The same logic applies when the program version is

configured to prorate cost using credits/hours. The calculated amounts are rounded. Based on this example, it is recommended that budget for all Academic Years to be calculated in advance before loan periods are created. This will ensure more accurate budget information for the loan periods. The loan period budget can also be recalculated through the loan period form if budgets in the Academic Years are changed.

- Packaged EFC of a loan period comes from the ISIR being paid on for the Academic Year.
- EFA of a loan period is calculated by prorating the awards in the Academic Year that overlaps the loan period. Prorating is based on the number of weeks. Prorating is done at the Academic Year's payment period level. For example, there is a Pell award for $4000 in AY 1. There are two payment periods with $2000 in each payment period. This Pell award is counted as EFA for both LP1 and LP2.

  EFA from Pell for LP1:

  - ($2000 in first payment period / 13 weeks) * 12 weeks = $1,846

  EFA from Pell for LP2 will be calculated based on awards that are in both AY1 and AY2:

  - ($2000 in first payment period / 13 weeks) * 1 week = $154
  - All $2000 in the second payment period will be considered because all of the second payment period overlaps with LP2
  - If other awards exist in AY2, they will be prorated and included in EFA of LP2.

  EFA for LP3 will be calculated based on awards in AY2 and AY3.

  Note: Based on this example, it is recommended that when packaging for overlapping loans, non-direct loan awards be packaged in advance if possible, prior to packaging for direct loans. This way EFA can be correctly calculated for loan periods that cross over multiple Academic Years. This will allow the student to be packaged accurately.

- For the first loan period, the direct loan amount to be awarded is determined by subtracting the amount already received at the prior institution from the student's maximum eligibility at the current institution. Other loan periods will be packaged up to the maximum amount based on the student's grade level and dependency status in the loan period.
- Validations are in place to ensure that the final loan amount cannot be greater than the COAs of the loan period.

Related Topics:

- NSLDS Previous Institute Details form, which stores NSLDS information from the student's ISIR.
- Loan Periods form, which contains loan period information such as the number of weeks and hours/credits, as well as budget for the loan period and payment periods for each loan period.
- Loan Periods Packaging view, which displays all awards packaged for each loan period. It also contains COA, EFC, and EFA data for the loan period.

Notification of Receipt

You can set up CampusNexus Student to print notifications of receipt for each type of financial aid received. By law, a student must be notified each time a financial aid disbursement is received by the institution on the student's behalf and credited to the student's account. The text on each receipt can vary depending on the type of funding received.

Each fund source can have its own formatted receipt. Each receipt is created as a Crystal Report. You can customize the layout of each receipt.

Note: You must have access to the Crystal Reports program to edit Receipt Notifications.

The following student data can be displayed on the receipt:

Today's date
Student name - SyStudent.Firstname + SyStudent.Lastname
Student's address - SyStudent.Addr1
Student's city - SyStudent.City
Student's state - SyStudent.State
Student's ZIP - SyStudent.Zip
Student's phone number - SyStudent.Phone
Student's SSN - SyStudent.Ssn
Student's enrollment number - AdEnroll.StuNum
Student number - SyStudent.Stunum
Student's program version description - AdProgramversion.Descrip
Student's enrollment current account balance - AdEnroll.ArBalance
Student's overall current account balance - SyStudent.ArBalance
Student's campus name - SyCampus.Descrip
Student's campus phone number(s) - SyCampus.Phone1, SyCampus.Phone2, SyCampus.Phone3

Loan Borrower Variables

The following merge variables are available to include in the receipt notifications that are printed when FA disbursements are received and posted to the ledger cards:

FaLoan.BorrowerSSn
FaLoan.BorrowerLastName
FaLoan.BorrowerFirstName
FaLoan.BorrowerMi
FaLoan.BorrowerAddress
FaLoan.BorrowerCity
FaLoan.BorrowerState
FaLoan.BorrowerZip
FaLoan.BorrowerPhone

Customized receipt notifications already on file need to be recreated or modified by a support rep to include the option of adding these fields.

Transaction-related data items available to be displayed on the receipt include the following:

Lender name - FaLender.Descrip
Lender address - FaLender.Addr1
Lender phone number(s) - FaLender.Phone, FaLender.Phone2
Lender fax number - FaLender.FaxNumber
Lender contact(s) - FaLender.Contact1Name, FaLender.Contact2Name
Fund source description - FaFundSource.Descrip
Fund source receipt notification comments - FaFundSource.ReceiptComment
Award year - FaStudentAid.AwardYear
Disbursement amount - SaTrans.Amount
Transaction date of disbursement - SaTrans.Date
Disbursement check/EFT number - SaTrans.Checkno
Transaction reference - SaTrans.Ref

Transaction description - SaTrans.Descrip
Transaction receipt number - SaTrans.ReceiptNo
Term code disbursement was for - AdTerm.Code (Join AdTerm on SaTrans.AdTermID)

All of the above listed data items may not be included on each defined receipt. They are available for you to drop onto the report. In addition, you can specify any amount of free text on the receipt.

A column for Receipt Comment Text is included in the FA Fund Source table.

A column is included in the FA Disbursements table for Date Receipt Printed.

CampusNexus Student has a default Notification of Receipt report. It will be used as the default Notification of Receipt for each fund source unless you modify the layout for that fund source. The default layout is as follows:

Today's Date

School Name School Phone #

Student's Name
Student's Address 1
Student's Address 2
Student's City, State, and ZIP
Student's Phone #

Current Account Balance: $######.##

Fund Source: *nnnnnnnnnnnnnnnnnnnn* Award Year: ####-##

Disbursement Amount: ####.##

Disbursement Date: 99/99/9999

Check Number: *nnnnnnnnn*

Receipt Number: *nnnnnnnnnnnnnn*

Fund Source Receipt comments

This default receipt is named lst_FaDefaultReceipt. If you customize the default receipt report, it will be saved as cst_FaDefaultReceipt. When you customize a receipt for a fund source, the resulting report name will be cst_Fa*nnnnnnnn*Receipt, where *nnnnnnnn* is the fund source code.

Setup > Financial Aid > Packaging

You can modify the default receipt notification report from the FA Setup Packaging form.

Lists > Financial Aid > Fund Source

An **Edit Receipt Notification** button is available on each fund source form. When you click this button, you are taken into Crystal Reports and where you can edit the receipt layout. **You must have access to the Crystal Reports program to edit Receipt Notifications.** CampusNexus Student first checks if a report exists for the selected fund source. If a report exists for the fund source (cst_Fa*nnnnnnnn*Receipt), that report is loaded. If a report does not exist for the fund source, the default receipt (lst_FaDefaultReceipt) will be copied to cst_Fa*nnnnnnnn*Receipt. The cst_Fa*nnnnnnnn*Receipt is be loaded for editing.

View > Student Accounts > Ledger Cards

The Student Accounts Ledger form contains a **Print Receipt** button to print the Notification of Receipt for any received FA disbursement. This option generates a generic receipt for the currently selected transaction on the ledger card. However, if the selected transaction on the ledger card is an FA disbursement received, and the FA fund source type is not CASH, the corresponding Notification of Receipt is printed.

To determine which Notification of Receipt report should be loaded when this option is selected, CampusNexus Student checks for the existence of a receipt report for the fund source received.

1. If cst_Fa*nnnnnnnn*Receipt exists (*nnnnnnnn* = Fund Source code), that report is loaded.
2. If cst_Fa*nnnnnnnn*Receipt does not exist, CampusNexus Student looks for cst_FaDefaultReceipt.

3. If it does not exist, lst_FaDefaultReceipt is loaded.

After the receipt is printed for the selected transaction, CampusNexus Student updates FaDisb.DateReceiptPrinted with the system date.

Daily > Student Accounts > Post FA Disbursements

The Student Accounts Post FA Disbursements form contains a button to print a Notification of Receipt for each FA disbursement received in the posted batch. The logic to determine which receipt report to use is the same as explained above. It is possible that a posted batch of FA disbursements includes disbursements for more than one fund source. This means that it is possible that more than one receipt report needs to be used when generating these receipts. The option to print the receipts is available after clicking Post to post the batch. The following message is displayed: *"Print receipt notifications for disbursements just posted?"*

Daily > Student Accounts > Post Payments

The Student Accounts Post Payments form prints a Notification of Receipt for any posted FA disbursement. You can print a receipt notification after clicking Save. If the payment posted was not a scheduled payment or the fund source type is CASH, a standard receipt is printed. (The receipt notification is not printed.)

New Source of Aid

While packaging Financial Aid for a selected student, you may want to add a new source of aid for the student. When you attempt to package a student by navigating to View > Financial Aid > Financial Aid Packaging > New Source of Aid and add a new source of aid, the new source of aid is considered a Title IV fund source.

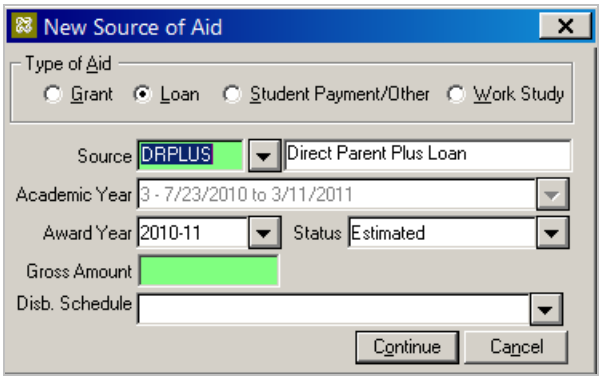
Note: If your institution has enabled the feature that prevents awarding Title IV funds to students who do not have valid ISIRs on file, CampusNexus Student allows you to add fund sources that are non-Title IV, but prevents you from awarding Title IV funds. CampusNexus Student displays a message indicating that awarding Title IV aid is not allowed because no ISIR exists for the student for the award year being packaged. This feature is enabled or disabled in the Campus Financial Aid form by selecting the Approve Awards for Verified Students Only option.

Add a Fund Source

Default values for fields in the **New Source of Aid** forms are set up in **Setup > Financial Aid > General > Setup**. Users must have the required levels of permission to do so.

To add a new source of financial aid to a student's FA list:

1. Select a student.
2. Navigate to **View** > **Financial Aid** > **Packaging**. The Financial Aid Packaging form is displayed.
3. Double-click the academic year for which the new source of aid is to be added, or select it and click **Edit**. The Financial Aid Academic Year form is displayed.
4. Click **Package**. The Financial Aid Packaging Form is displayed. Any existing fund source is listed on the grid in the upper left portion of the form.
5. Click **Add**. The New Source of Aid Form is displayed.



6. Select the **Type of Aid**. The options are Grant, Loan, or Student Payments/Other. "Other" includes such aid options as agency payments, scholarships, and so on. If you select Student Payments/Other, you are prompted to generate an Award Letter when you start the packaging process.
7. Select the **Source**. The configured sources of funds are displayed.
    - Only the sources that are appropriate for the fund source type of aid you selected are listed. Deactivated fund sources may not appear for the award year selected.
    - If a 'Graduate PLUS loan' is selected and the student is not a graduate, an error message is displayed with instructions to proceed. A student is considered to be a Graduate Student based on the grade level as

specified on the student's Financial Aid Academic Year form. See also Grade Level.

- If a regular PLUS loan is selected as the fund source and the student is a graduate, an error message is displayed with instructions to proceed.

8. Select the **Academic Year**. If this field is dimmed, it has already been selected for you.
9. Select the **Award Year**.
10. Select the **Status** of the new fund source. The options are:

    - E = Estimated
    - A = Approved
    - P = Pending Approval

    The status of the financial aid being packaged, entered on the New Aid form, is carried forward into the subsequent form when it is loaded. The forms include the Pell Grant, Federal Work Study, Other Grants, Direct Loans, Other Student Loans, and Student Cash/Other.

    If the status of the aid being packaged is Estimated, CampusNexus Student does not automatically calculate the expected disbursements. The affected forms are Pell Grant, Other Grants, and Other Student Loans. The FA packaging forms allow an expected disbursement schedule to be calculated for financial aid that currently has no expected disbursements scheduled. This is used for FA that was originally packaged as Estimated and later changed to Approved. The expected disbursements can be scheduled at the time the status of the aid is change to approved.

    The "Approved" status is available in the drop-down list when you add or edit a fund source; however, CampusNexus Student displays an informational message stating that the verification status of "Verified" is required before the student's award status is saved as "Approved". If the fund source is a PLUS loan, you can save the student's award status to "Approved" in the New Source of Aid form.

11. Enter the **Gross Amount**.

    The packaging forms warn the user when the amount packaged for the fund source exceeds the allowable commitment level for the fund source. CampusNexus Student checks the Financial Aid General Ledger (FAGL) Authorization table for the amount authorized for the award year and multiplies this amount by the commitment level for the fund source. If the new packaging amount exceeds the commitment level, a warning message is displayed indicating that you have exceeded the level for the year.

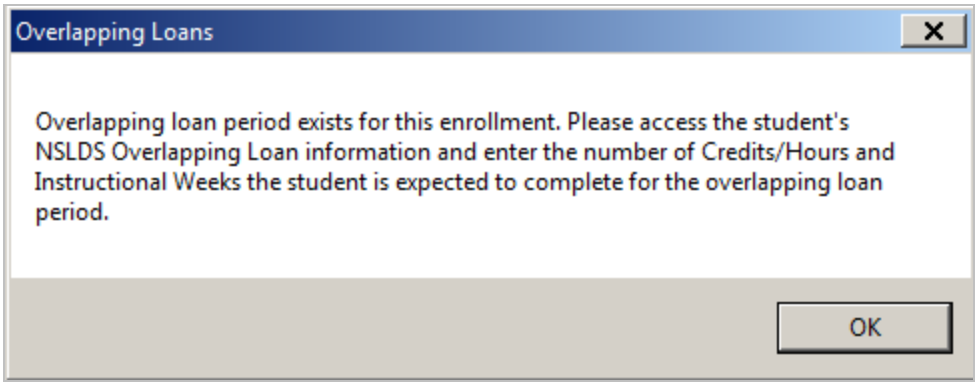
    After a student is packaged, CampusNexus Student updates the Amount Packaged column in the FAGL Authorization table. CampusNexus Student checks the commitment level for a fund source before adding the fund source to the student's scheduled aid. If the commitment level is exceeded, a message is displayed to inform you why a particular fund source was not auto-packaged. If an amount is auto-packaged, CampusNexus Student updates the Amount Packaged column in the FAGL Authorization table.

12. Select an optional **Disbursement Schedule**. After you select a Source for the new FA, CampusNexus Student populates the Disbursement Schedule list. For a schedule option to appear on the list, the student's academic year start date must fall within the date range of the disbursement schedule. You can limit staff members who may

configure this field, and configure the field as required when setting up new aid.

13. Click **Continue**. CampusNexus Student displays the appropriate form based on the type of aid you selected. The entries you made on this form are carried over to the next form.

    Note: When you add a direct loan award for an overlapping loan period and did not populate the fields "Overlap Period Credits/Hours" and "Overlap Period Weeks" in the "NSLDS Loans / Overlapping Loan Periods" tab of the NSLDS Previous Institute Details form, the message below is displayed. The "Overlap Period Credits/Hours" and "Overlap Period Weeks" are required to create loan periods to award direct loans for the overlapping loan period.



14. Complete the selected fund source form to add the new source to the student's list.
15. Click **Cancel** to cancel the addition of a new source and return to the previous form.

Other Financial Aid Loan Form

All types of financial aid loans **except Direct Loans from the Department of Education** are processed using the Financial Aid Loan form. Basic information about the loan is shown at the top of the form. The tabs on the form lead you to more specific information about the loan. You can add, delete, or cancel disbursements. The Financial Aid Loan form has the following tabs:

- Scheduled Disbursements
- Received and Refund/Stipend
- Borrower Information
- Promissory Note and Other Information
- Comments

All non-direct (other) loans may be electronically transmitted via the CommonLine file formats. Although there is some information specific to direct loans not required by CommonLine and information specific to CommonLine not required for direct loans, the majority of information required is similar. For this reason, the form design for non-direct loans is patterned after the form design of the direct loans.

The static information about lenders, servicers, and guarantors is set up under Lists > Financial Aid > Lenders. Review that information when you are working with student loans.

Some parameters for loans are entered when the fund source is set up under Lists > Financial Aid > Fund Source.

Notes:

When an Award status is set to 'Canceled', the disbursements associated with the award will also be set to a status of 'Canceled'. Under these conditions the disbursements may not be added or re-expected.

- If the **Add** button is selected, the following message is displayed: *"Cannot add disbursement to a canceled Award"*.
- If the **Re-Expect** button is selected, the following message is displayed: *"Cannot Re-Expect a disbursement while the Award is in 'Canceled' status. Select a new Award Status and try again."*

You may not 'Calculate' or 'Recalculate' disbursements.

- If the **Calculate** or **Recalculate** buttons are selected, the following message is displayed: *"Cannot Calculate disbursements while Award is in 'Canceled' status. Select a new Award Status and try again."*

Actual Disbursements

Actual disbursements are approved in the Financial Aid department and disbursed in the Student Accounts department.

Actual disbursements Received, as well as refunds made, and stipends paid by the Student Accounts department are shown at the bottom of the form. Refunds may be necessary when a student drops out of school or drops below the enrollment status for which the loan was calculated. This data is read-only.

The logic that controls FA loan disbursements prevents the canceling of paid disbursements. The proper procedure after disbursements have been paid is to refund the payments.

The number of disbursements and percentage disbursed in each disbursement are set up under Lists > Financial Aid > Academic Years.

Note: When validating the scheduled disbursements against the total loan amount, the logic for validating the sum of the disbursements to the loan amount is as follows:

- Sum the net amount of disbursements received plus the net amount of scheduled disbursements that have not been received. This amount must be equal to or less than the net amount of the loan.
- When FA disbursements are posted as received on the student's ledger card from the Student Accounts Payments

form or from the Post FA Disbursements form, CampusNexus Student updates the Student Academic Year ID column in the FA Disbursements table.

Refunds and Stipends

Refunds and stipends are processed in Student Accounts under Daily > Student Accounts > Process Refunds/Stipends. Refunds can also be posted from the student's ledger card by clicking Post Refunds.

Validations When Saving

CampusNexus Student includes the refund amounts when checking the disbursements against the total amount packaged. When CampusNexus Student adds scheduled and disbursed amounts to prevent you from going over the amount packaged, CampusNexus Student takes into account refunds on student loans (other than direct loans) and Pell Grants. Direct Loans are handled through the origination change.

To work with the Financial Aid Loan form:

1. Select a student.
2. Navigate to **View > Financial Aid > Packaging**. The Financial Aid Packaging form is displayed.
3. Double-click the academic year for which the loan is required, or select it and click **Edit**. The Financial Aid Academic Year form is displayed.
4. Click **Package**. The Financial Aid Packaging Form is displayed. Any existing fund sources including loans are listed on the grid in the upper left portion of the form.
5. Click **Add** to add a new loan. The New Source of Aid Form is displayed. You must select a Packaging Method before you can add a new loan.
6. Sometimes, it is necessary to enter the same type of loan more than once in the same award year. CampusNexus Student asks if you want to continue when adding a second loan.
7. Select the **Source** for the type of loan.
8. Select the **Academic Year**.
9. Select the **Award Year**.
10. Select the **Status** of this loan. The status options are: **A** - Approved, **C** - Canceled, **E** - Estimated, and **P** - Pending Approval.

    ### Canceled status

    When you cancel a loan disbursement, CampusNexus Student checks if all other disbursements for the award are in canceled statuses.

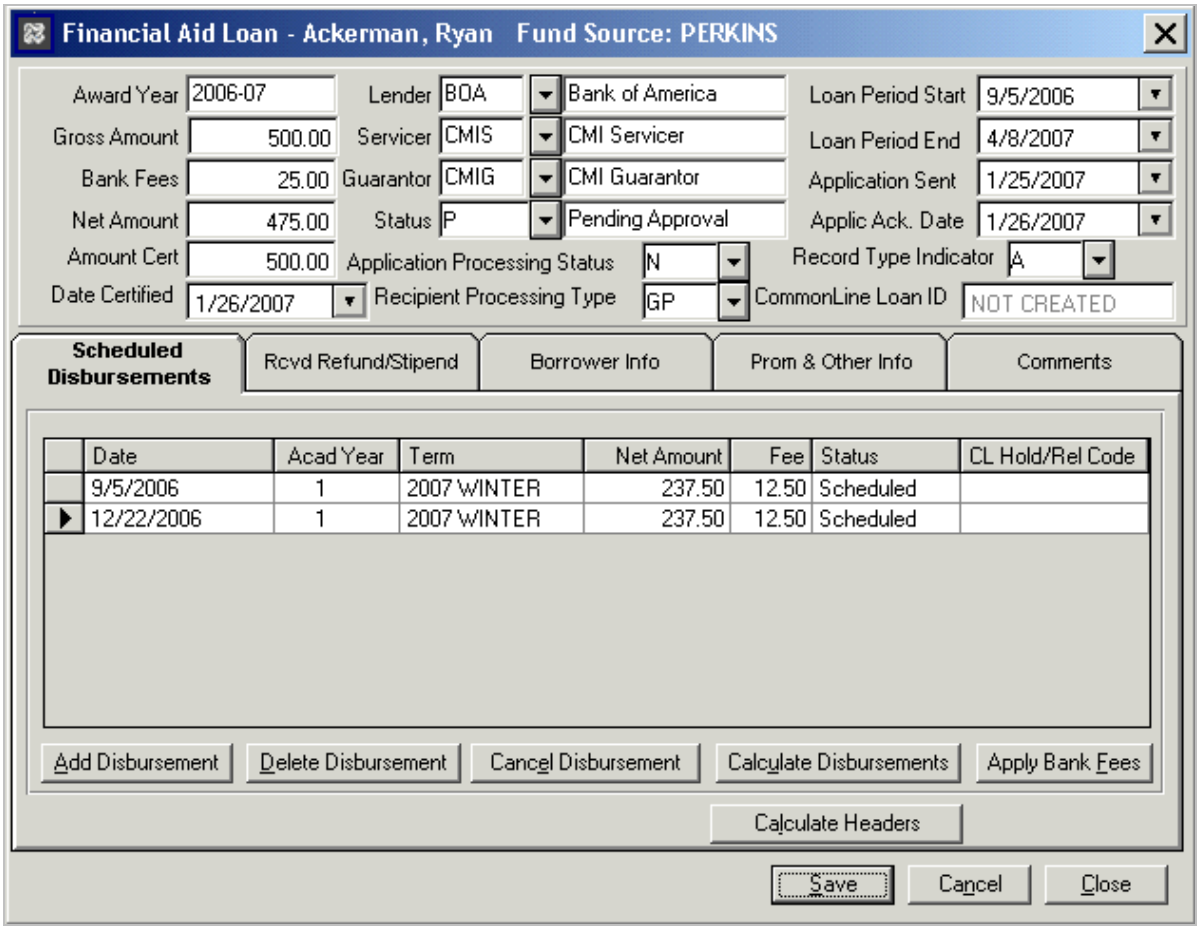
    - If so, the status for the loan award is changed to "Canceled".
    - If at least one disbursement of a loan award has a status of "Paid" or "Ready to Pay", the "Cancel" option is not available in the award's status drop-down list.

    The status for all disbursements associated with a loan award is set to "Canceled" if a user cancels the award. Additionally, if the loan origination status is "Ready to Send", the status is changed to "Not Ready to Send" if the award has been canceled.

    When a student's school status is changed to a never attended status, the loan award's status is changed to "Canceled", and the loan origination status is "Ready to Send", then the status is changed to "Not Ready to Send" if all associated disbursements have a canceled status.

11. Enter the **Amount** of the loan.

12. Click **Continue**. Double-click an existing loan fund source on the Packaging form, or select it and click **Edit**. The Financial Aid Loan form is displayed. Enter or change data on the top portion of the form as required.



13. The Lender, Servicer, and Guarantor data are populated with the defaults that were set up on the Fund Source Code Setup form.

Basic Loan Data Fields

Field	Description
Award Year	The Award Year is carried over from the Packaging form.
Gross Amount	Enter the gross amount of the loan. This includes the net amount plus the bank fees.
Bank Fees	Enter the fee charged by the lender for the processing the loan.
Net Amount	The net amount is calculated.

Field	Description
Amount Cert (Certified)	If the status is other than Sent, Amount Certified is enabled. You can edit the amount certified only if the CommonLine Application Status is null, R, N or D. If you are adding a new loan, this amount is defaulted to the maximum amount the student is eligible to receive for this fund source. This amount is determined from the packaging method being used for the student's academic year being packaged. The amount entered here cannot be less than the loan amount nor greater than the maximum amount determined from the packaging method. Loan amount specified by the school is what the borrower is eligible to receive. This figure does not always match the amount of the loan.
Lender	Select the lender that is providing the loan funds.
Servicer	Select the servicer that is servicing the loan (collecting payments, etc.)
Guarantor	Select the guarantor that is guaranteeing the loan.
Status	Select the status of the loan. The status options are Estimated, Pending Approval, Approved, and Canceled. **Note**: When you cancel a disbursement, CampusNexus Student determines if all disbursements for the award have a status of Cancel. If all disbursements for the award have a status of Cancel, the award is set to Cancel; however, if at least one disbursement for an award has a status of Paid or Ready to Pay, the choice Cancel is not available.
Loan Period Start	Enter the loan start date. The default is the beginning date of the Academic Year.
Loan Period End	Enter the loan end date. The default is the ending date of the Academic Year.
Application Sent	Enter the date the application was sent to the lender.
Applic Ack. Date	Enter the date the application was acknowledged by the lender.

Field	Description
Application Processing Status	Select the status of the application process. If it is a new application, your choices are: • Blank = Not Specified • R = Application is Ready to Send • N = Application is Not Ready to Send This field can be edited only if the current status is Blank, R, N, or D. Depending on the current value of this field, the valid values to which the status can be changed are as follows: • Blank can change to R or N • R can change to N • N can change to R • D can change to R The above changes may be affected by the award Status and the 'Originate/Certify Estimated Awards' (Setup > Campus Locations > Financial Aid) option setting. If your institution has enabled the 'Originate/Certify Estimated Awards' option, you can set the Origination Status to Ready to Send when the Award Status is 'E' (Estimated), 'P' Pending Approval, or 'A' (Approved). Once sent, the following codes can be displayed in this field: • A = Initial processing successful, will guarantee upon receipt of prom note • I = Initial processing successful, pending further approval • G = Guaranteed • B = Guaranteed, prom note received and approved for disbursement • P = Pending processing (error resolution underway by sending organization) • D = Denied/rejected/incomplete • S = Application sent. Response not yet received **CommonLine Application Status** If the CommonLine Application Status is one of the following: S, I, G, B, A, or T, CampusNexus Student does not allow deletion of the fund source from the student's package. If Application Processing Status is in "Not Ready to Send" status, and you attempt to change the status to "Ready to Send" when existing or new criteria has not been met (listed below), CampusNexus Student displays a message with the outstanding criteria that must be corrected. **CommonLine Validations** The following is a partial list of validations required for CommonLine Loans: 1. Valid Graduation date, i.e., the graduation date is greater than or equal to the loan period end date. The date must be less than the loan period end date. 2. Loan Period is within Academic Year Start and End dates. 3. Valid Award Year, based on Loan Period, i.e., Award Year on Loan should be equal to Award Year 1 in the Academic Year screen. 4. Valid Student Status, i.e., Student is not in Cancelled status. 5. Verify that an Entrance Interview was Completed. 6. Verify that the Comment Codes have been resolved. 7. Verify the Student and Parent Date of Birth fields are not empty or invalid date. 8. Verify Phone Number is numeric.

Field	Description
	The validations are checked by CampusNexus Student when packaging and exporting CommonLine loans. Only if the Application Processing status security configuration is enabled, will the Application Processing status and validations be verified when a user packages CommonLine loans; however the criteria will always be verified, along with the existing validation, when exporting CommonLine loans regardless of whether the setting is configured. When the user changes the value for a loan's Application Processing Status, or creates a new loan, a record of this is displayed in the Financial Aid Audit form.
Recipient Processing Type	The recipient is the lender or servicer that receives the CommonLine data. This field defines the default process type that will be performed by the recipient when receiving applications, as follows: • CR = School certification request • GO = Guarantee loan only • GP = Guarantee loan (prior to receipt of promissory note) and print application/promissory note • PG = Print application/promissory note and guarantee loan (after receipt of promissory note) • PO = Print application only Users can edit this field if the CL Application Status is null, R, N, or D. If a loan is being added, this field reverts to the default processing code specified for the recipient of this loan record. This can be determined by finding the record in the CL Recipient table that matches the Lender/Guarantor criteria specified for the loan.
Record Type Indicator	This field defines the type of detail record this loan will be sent as in the Application Send file. • A = New application submitted for processing • C = Correction application submitted for processing (prior to guarantee) • R = Reprint of application • T = Terminate request (Withdrawal of loan prior to guarantee. Once guaranteed, cancellation of a loan must occur using Change Transaction send file) When a new loan is added, the default value is A. This field can be edited only if the CL Application Status is blank, R, N, D, or P.
CommonLine Loan ID	If a new loan is added or the contents of the CommonLine Loan ID is null, CampusNexus Student displays "NOT CREATED". The CommonLine Loan ID will be created for each loan that is extracted during the routine that creates the Application Send file. This ID cannot be edited here. (17 characters).

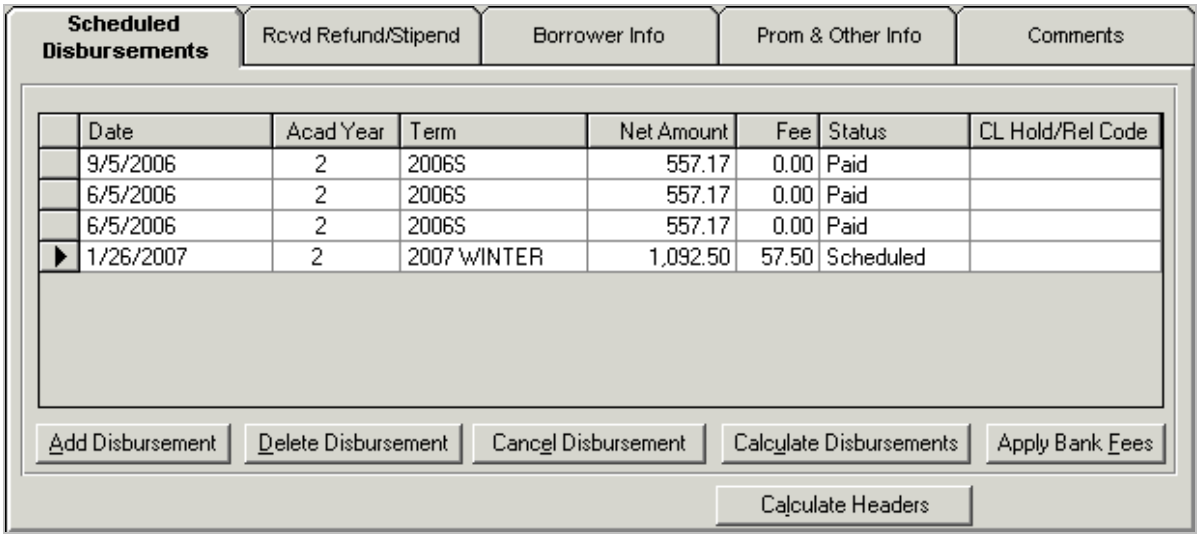
14. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Scheduled Disbursements Tab

Set up the disbursements after completing the top of the Financial Aid Loan form. Scheduled disbursements are created when the status on the **New Aid** form is selected as Approved or Pending, OR when the **Add** or **Calculate** tabs are clicked on the **Student Loan** form. The Scheduled Disbursement list is not created when new aid is added with a status of Estimated. Individual disbursements with a status of Paid or Cancelled cannot be edited.

When a student is dropped, financial aid is cancelled. If the student is reinstated, financial aid must be "re-expected". Scheduled disbursements are not automatically changed back to scheduled. Review scheduled disbursements for each fund source to "re-expect" the disbursements that still apply.

1. Click **Calculate Disbursements**. CampusNexus Student calculates the disbursement schedule.

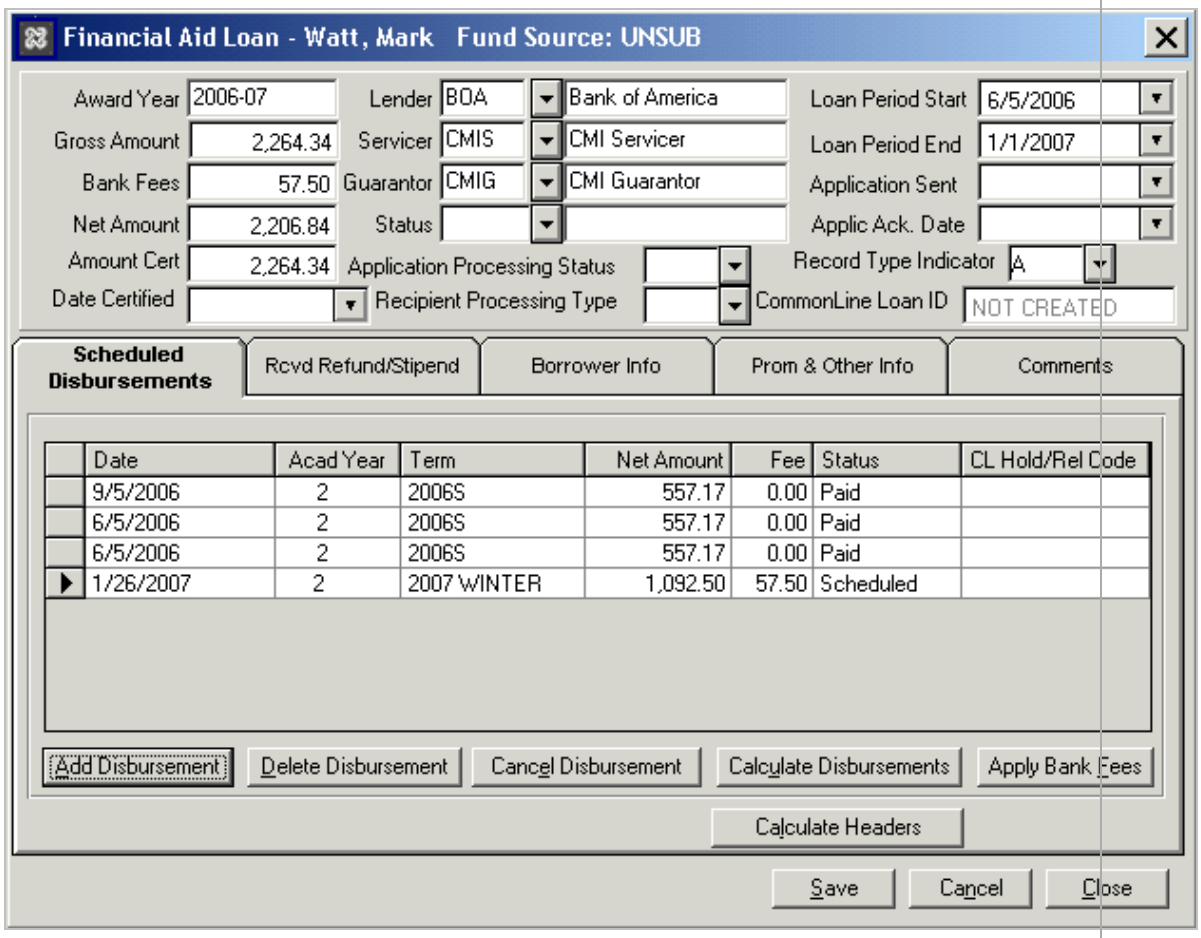


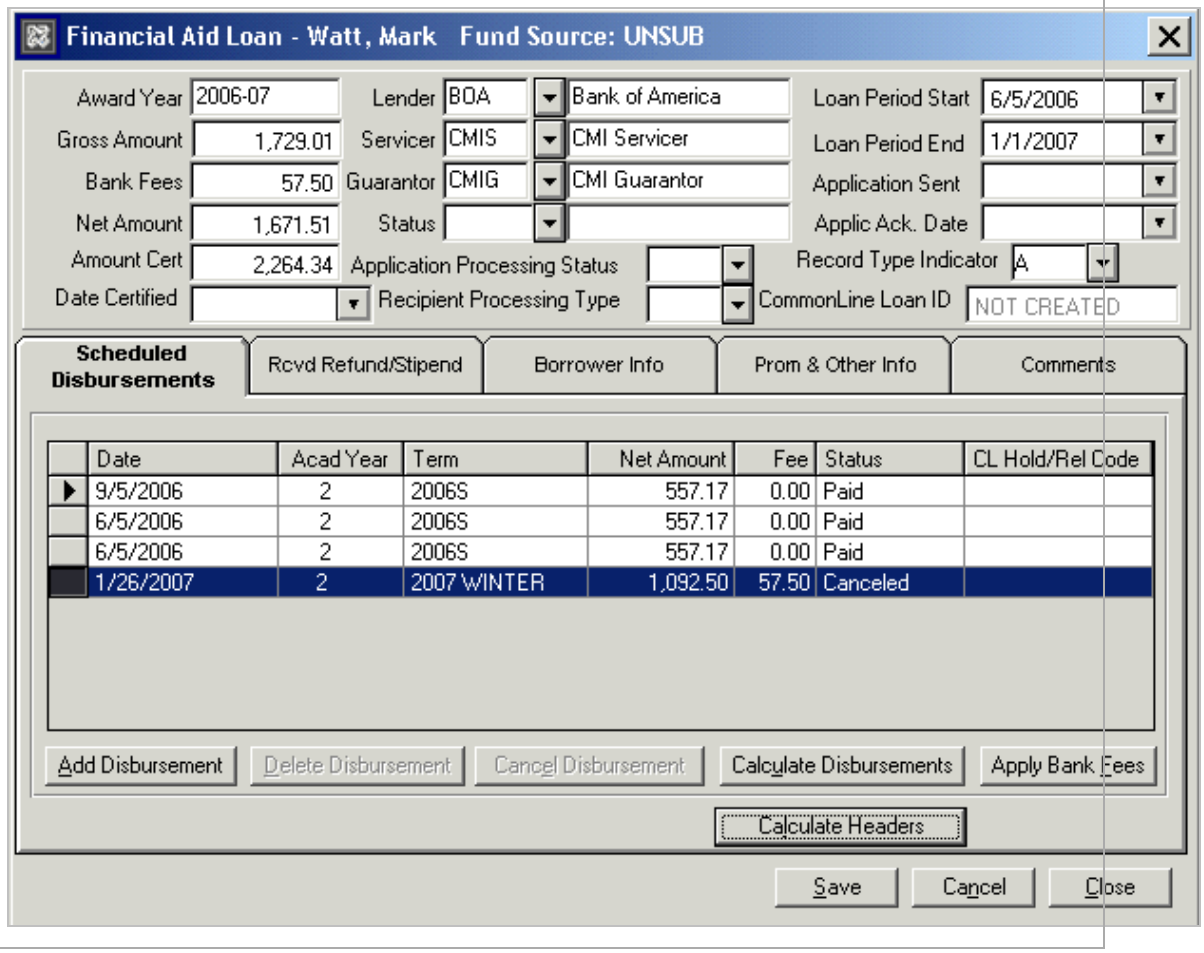
2. Enter data as necessary for each scheduled disbursement.

Field Descriptions: Scheduled Disbursements Tab

Field	Description
Date	Expected date of the disbursement.
Acad Year	Academic year number to which the disbursement applies. Edit the "Acad Year" for each disbursement if the disbursement passes the criteria required for edit the field. If the Acad Year can be edited and you edit this field, a drop-down list is displayed showing each academic year for this student's enrollment. Each record displayed in the list shows the academic year number, academic year start date, and academic year end date. When new scheduled disbursements are added for the FA Loan, CampusNexus Student defaults the academic year for each disbursement to the academic year being packaged.
Term	Term to which the disbursement applies. The Term code can be edited only on a disbursement in the Scheduled section if the disbursement has a status of Scheduled (S).
Course Code	This column appears if the fund source type is 'Cash', 'Other', or 'Scholarship' and it has been set up to associate payment with a course for disbursements. See Fund Source form (Associate Courses with Payment field) and Other Grant form for additional information. The only applicable fund source types are 'Cash', 'Other', or 'Scholarship, otherwise, this field is not displayed. Only the courses scheduled for the Term selected appear in the Course Code drop-down list. Select the course associated with the payment.
Net Amount	Net amount of the disbursement as calculated by CampusNexus Student from the gross amount, bank fees, and the number of payments specified for this type of loan.

Field	Description
Status	Status of the disbursement. Statuses include Scheduled, Paid, and Cancelled.
CL Hold/Rel Code	Valid values for this field are: • H = Hold disbursement until release notification is given • R = Release the disbursement as scheduled • Blank When adding a loan, the value of this column for each disbursement defaults to the default hold-/release indicator code specified for the CommonLine recipient of this loan. The CommonLine recipient is determined by finding the record in the CL Recipient table that matches the lender-/guarantor criteria specified for the loan. For Parent PLUS loans, if a Dependency Status Conflict occurs, a warning message is displayed for the users to resolve this issue by refunding, canceling, or updating the FAFSA or ISIR.
Add Disbursement button	Click **Add Disbursement** to add a new disbursement to the schedule.
Delete Disbursement button	Click **Delete Disbursement** to permanently remove a disbursement from the schedule.
Cancel Disbursement button	Click **Cancel Disbursement** to cancel a disbursement. This differs from Delete because the record of the disbursement remains on file for later reference. When you select a different row, the button label is updated. If the selected disbursement has been cancelled, the button label is 'Re-Expect'. Otherwise, it is 'Cancel'.
Calculate Disbursements button	Click **Calculate Disbursements** to calculate the disbursement schedule based on all the entered parameters. If no disbursements are scheduled, an expected disbursement schedule is created. Click **Calculate Disbursements** at any time to see the current information.

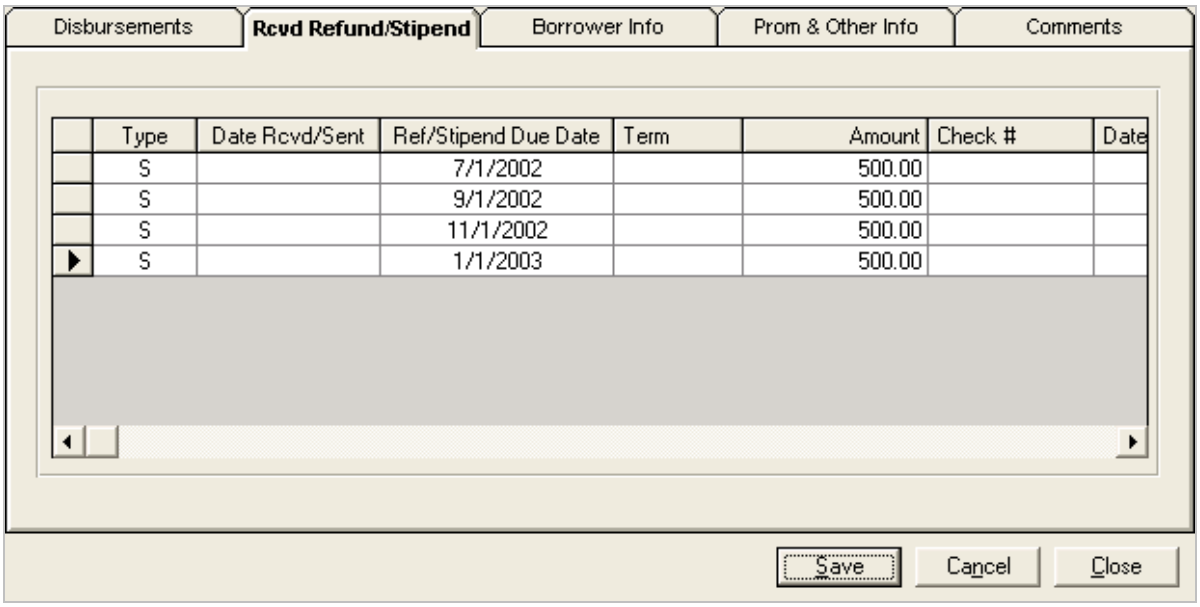
Field	Description
Calculate Headers button	Click this button if you want CampusNexus Student to recalculate the *Gross* and *Net amount* values listed at the top of the form, after canceling a scheduled disbursement, so that the amounts only reflect the paid disbursements. Refunds were not being taken into consideration when using the 'Calculate Headers' feature. Student refunds will be included in the calculation. **Before Scheduled Disbursement is Cancelled**  Select the scheduled disbursement and click **Cancel Disbursements** to cancel the scheduled disbursement. Click the **Calculate Headers** button. The **Gross Amount** and **Net Amount** fields at the top of the **Financial Aid Loan** form now reflect the sum of the paid disbursements.

Field	Description
	

3. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Received Refund/Stipend Tab

The Received Refund/Stipend tab displays data about disbursements, refunds, and stipends that have been processed by CampusNexus Student. Scroll horizontally to see all fields.



Field Descriptions: Rcvd Refund/Stipend Tab

Field	Description
Type	Read-only. Type of transaction on the row: Disbursement, Refund, or Stipend.
Date Rcvd/Sent	Read-only. Date the disbursement was received, the date the refund was made, or the date the stipend was paid depending on what type of record it is. This column will be blank if the type is a refund or stipend and the status is scheduled.
Ref/Stipend Due Date	Read-only. If the type is a refund, it is the date due. If the type is a stipend, it is the date scheduled.
Term	Read-only. Term in which the disbursement, refund, or stipend occurred.
Amount	Read-only. Amount that was posted to the student's ledger card.
Check Number	Number of the check or the EFT transaction for the disbursement.
Date Deposit	Date of the deposit of the disbursement funds.
Date Signed	Date that the student signed for the loan disbursement.
Batch ID	Number of the batch in which the disbursement was posted to the student's ledger card.
Status	Status of the disbursement. Status options include Approved and Paid.

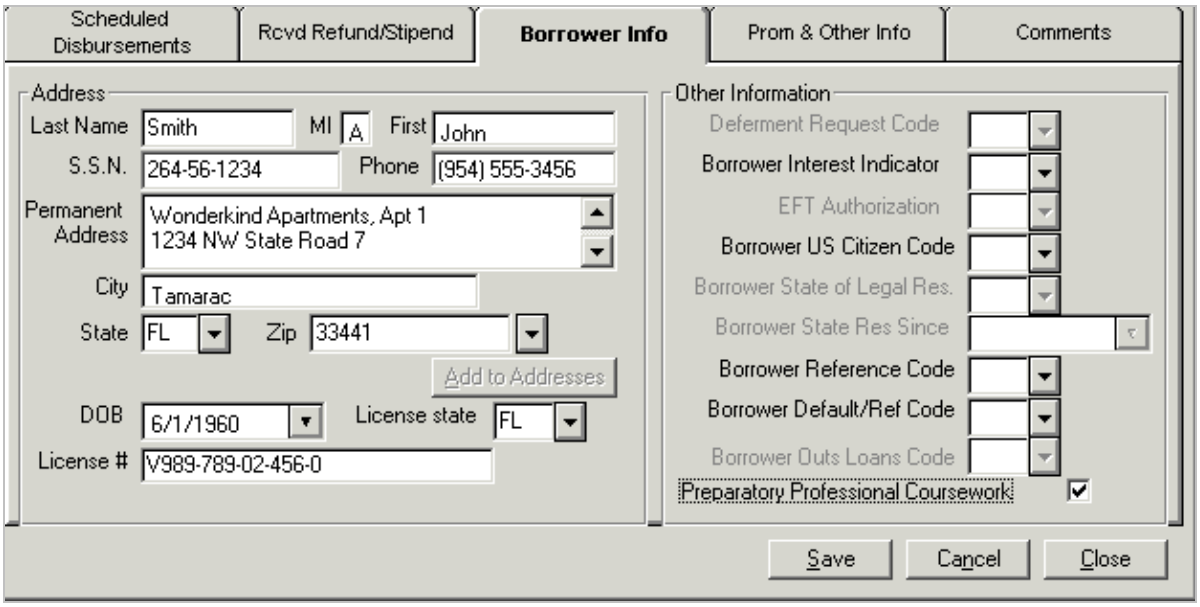
Borrower Information

The Borrower Information tab is used to capture all information related to the borrower of the loan. When adding a loan, if the student is the borrower of the loan, several fields on this form default to the student's information. The student is the borrower of the loan if the fund source type is SUB, UNSUB, or PERKINS; OR the fund source type is LOANNB or LOANNNB, and the "Is the Student the Borrower" check box is selected. Otherwise, it is assumed that the student is not the borrower.

If the student is not the borrower, and the borrower information for the loan is blank, a "Borrower" drop-down list is displayed listing the last name and first name for all records in the student's address file for the current enrollment. When you select one of the

records in the drop-down list as the borrower,CampusNexus Student fills in the borrower information with the name, permanent address, telephone, and SSN from the address file.

If you do not select a record from the drop-down list, you must enter the borrower information. Click "Add to Addresses" to add a new address to the list. Select the address type and enter the necessary information.



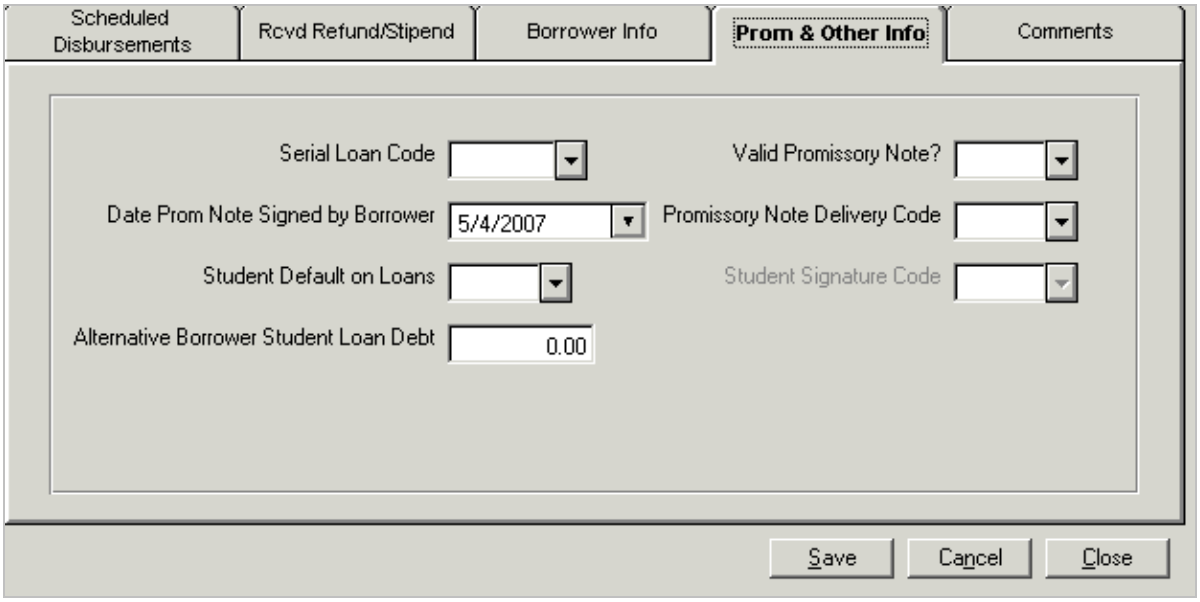
Field Descriptions: Borrower Info Tab

Field	Description
Borrower Name	Borrower's last name, middle initial, and first name.
SSN	Borrower's social security number.
Phone	Borrower's telephone number.
Permanent Address	Borrower's permanent address.
City	City of borrower's permanent address.
State	State of borrower's permanent address.
ZIP	ZIP code of borrower's permanent address.
DOB	Borrower's date of birth.
License #	Borrower's driver license number.
License State	State in which the borrower's driver license was issued.
Deferment Request Code	Y, N, or null. This field is enabled only if the fund source type is LOANNB, LOANNNB, PERKINS, or PLUS.
Borrower Interest Indicator	Y, N, or null.
EFT Authorization	Y, N, or null. This field is enabled only if the fund source type is LOANNB, LOANNNB, PERKINS or PLUS.

Field	Description
Borrower U.S. Citizen Code	This field is enabled only if the fund source type is ((LOANNB or LOANNNB) and the borrower is not the student), or the fund source type is PLUS. Valid values for this column are: • 1 = Borrower is US Citizen, US National, Permanent resident of Pilau • 2 = Borrower is an eligible non-citizen.
Borrower State of Legal Residence	This field is enabled only if the fund source type is ((LOANNB or LOANNNB) and the borrower is not the student), or the fund source type is PLUS.
Borrower State Res Since	This field is enabled only if the borrower is not the student.
Borrower Reference Code	Y, N, or null. • Y= Reference information on application is complete • N= Reference information on application is not complete
Borrower Default/Refund Code	Y, N or null. This field is enabled only if borrower is not the student.
Borrower Outstanding Loans Code	Y, N or null. This field is enabled only if borrower is not the student. Does the PLUS/Alternative Loan borrower have any outstanding loans disbursed before July 1, 1993?
Preparatory Professional Coursework	Select the **Preparatory Professional Course Work** check box, if applicable, to designate whether the loan is for Preparatory coursework (to enroll in graduate or professional program) or Teacher Certification. If the option is selected, a tag <PreprofessionalCourseworkIndicator> is included in the COD Common Records as defined in the COD Technical Reference. The Grade Level for the loan is 5, the maximum Subsidized Stafford loan limit $5,500, and the combined Maximum $12,500 limit for loans is applied. **Note**: This flag is only accepted by COD when a loan is submitted that has a first disbursement date on or after July 1, 2007.

Promissory Note and Other Information Tab

The Prom & Other Information tab contains data about the promissory note and other miscellaneous information about the loan.



Field Descriptions - Prom & Other Info Tab

Field	Description
Serial Loan Code	Indicates how the school intends to use the Master Promissory Note. This field is enabled only if the fund source type is SUB, UNSUB, or PLUS. The valid values for this field are: • N = New; use a new MPN • S = Serial; renew the existing MPN • Blank = Not Specified. If the loan start date occurs after 06/30/2004, this field must be N or S.
Date Prom Note Signed by Borrower	Date on which the borrower signed the promissory note.
Student Default on Loans	Y, N, or null. This field is enabled only if borrower is not the student.
Alternative Borrower Student Loan Debt	Total amount of outstanding education loan debt for alternative loan borrower prior to this application.
Valid Promissory Note?	Blank, Y, or N. Y = Yes, school has a valid, signed promissory note. N = No, school does not have a valid, signed promissory note.
Promissory Note Delivery Code	Preferred method of delivering the promissory note to the borrower. Required if the Loan Processing Code is GP, PG or CR. The values is P if the Processing Code is PO. The is blank if the Processing Code is GO. • E = Email • P = Paper • W = Web • Blank
Student Signature Code	Y or N if borrower is not student. Not used if borrower is student.

Comments Tab

The Comments tab contains any comments concerning this loan. When you click the **Comments** button, the cursor is placed in the Comments window. Enter or edit comments as required. The Comments field holds up to 1000 characters.

FA Student Cash Payment/Other Form

This form is used to handle cash paid by the student or by an agency on behalf of the student. The form has the following tabs:

- Scheduled Payments
- Payments Received (contains a read-only ACH Transactions sub-tab)
- Refunds
- Auto Drafts
- Comments

Also see Payment Schedule Dates Calculations.

Note: Package student payments (cash) only if, after all other aid has been packaged, the Institutional Charges minus the Net Aid Packaged is greater than zero (0).

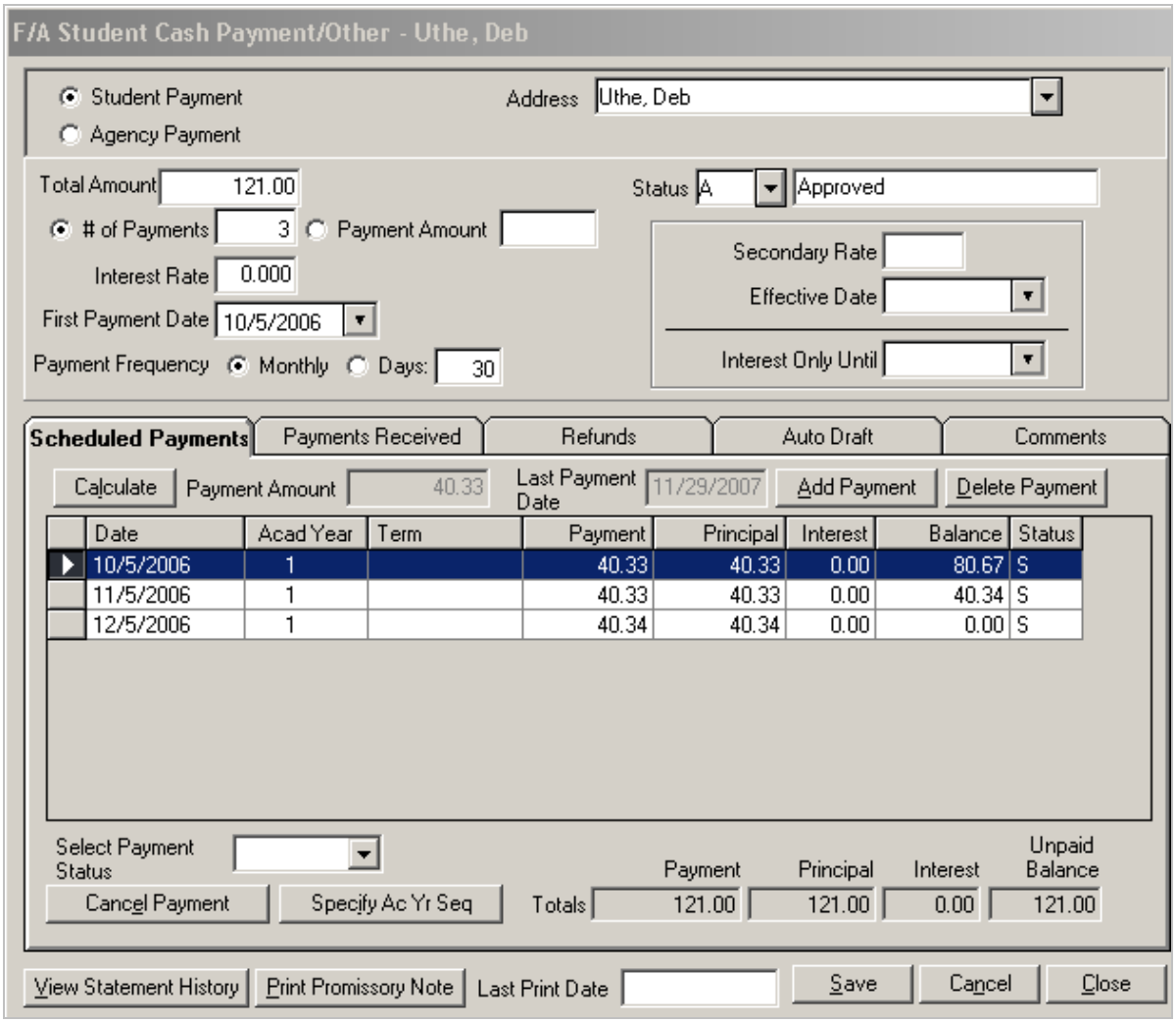
When Cash-Other payments are posted as received on the student's ledger card from the Student Accounts Payments form, CampusNexus Student updates the Student Academic Year ID column in the FA Disbursements table.

The Financial Aid Student Cash Payment/Other form prevents users from approving financial aid when the aid is from a Title IV fund source and the school is using a third-party FA servicer such as Global. All such approvals are managed by the servicer and imported by the servicer integration features. Users are also prevented from deleting a record that is associated with a Servicer ID. This can only occur through a Global change file.

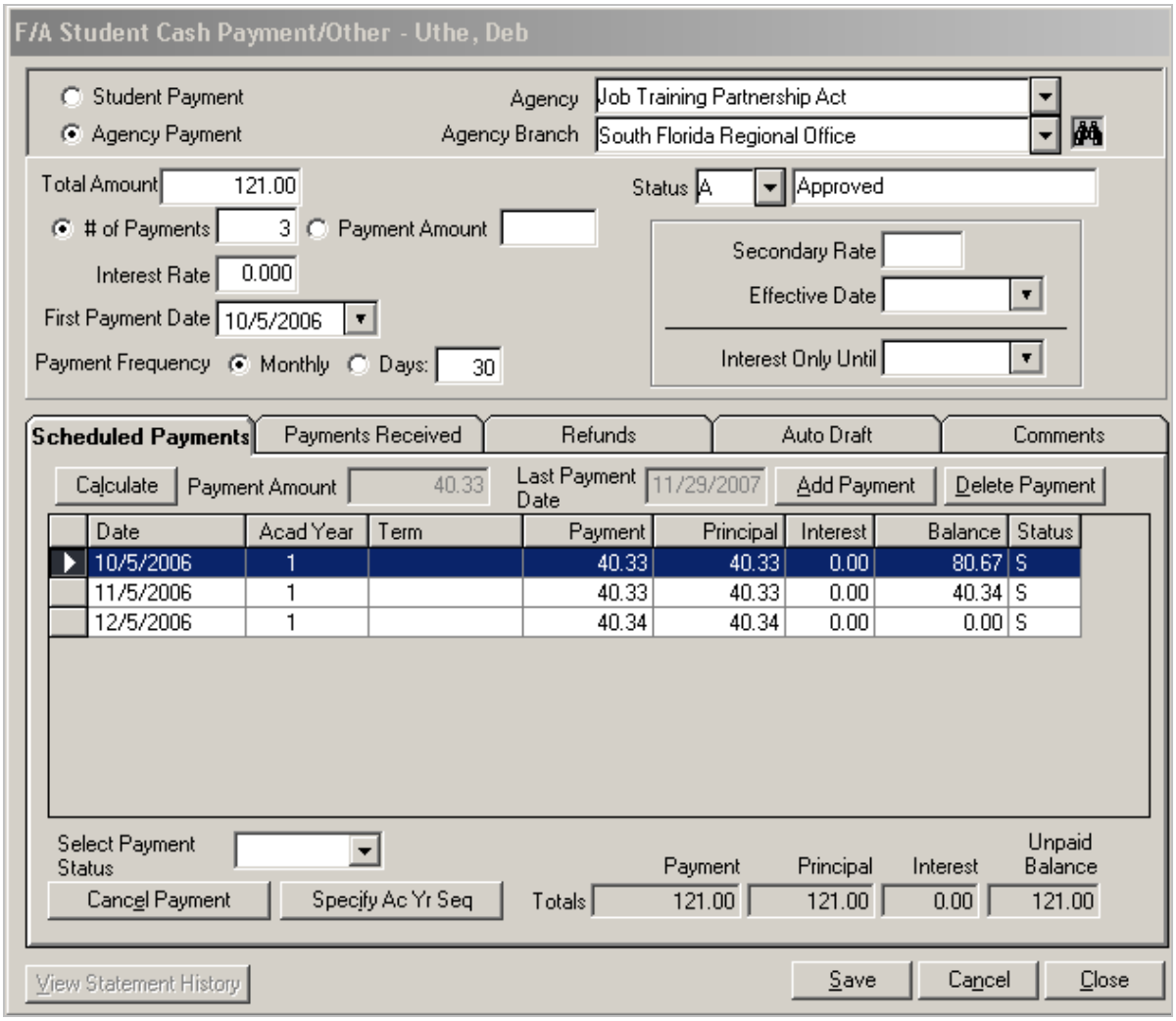
To work with the F/A Student Cash Payment/Other form:

1. Select a student.
2. Navigate to **View > Financial Aid > Packaging**. The Financial Aid Packaging form is displayed.
3. Double-click the academic year for which the payment is required, or select it and click **Edit**. The Financial Aid Academic Year form is displayed.
4. Click **Package**. The Financial Aid Packaging form is displayed. Any existing fund sources including student or agency payments are listed in the upper left of the form.
5. Double-click an existing cash payment or third-party payment fund source on the Packaging form, or select it and click **Edit**.
   - OR -
   Click **Add** to add a new payment schedule. The New Source of Aid form is displayed.
6. Select **Student Payment/Other** and complete the required fields. Click **Continue**. The F/A Student Cash Payment/Other form is displayed.
7. Select **Student Payment** or **Agency Payment**.

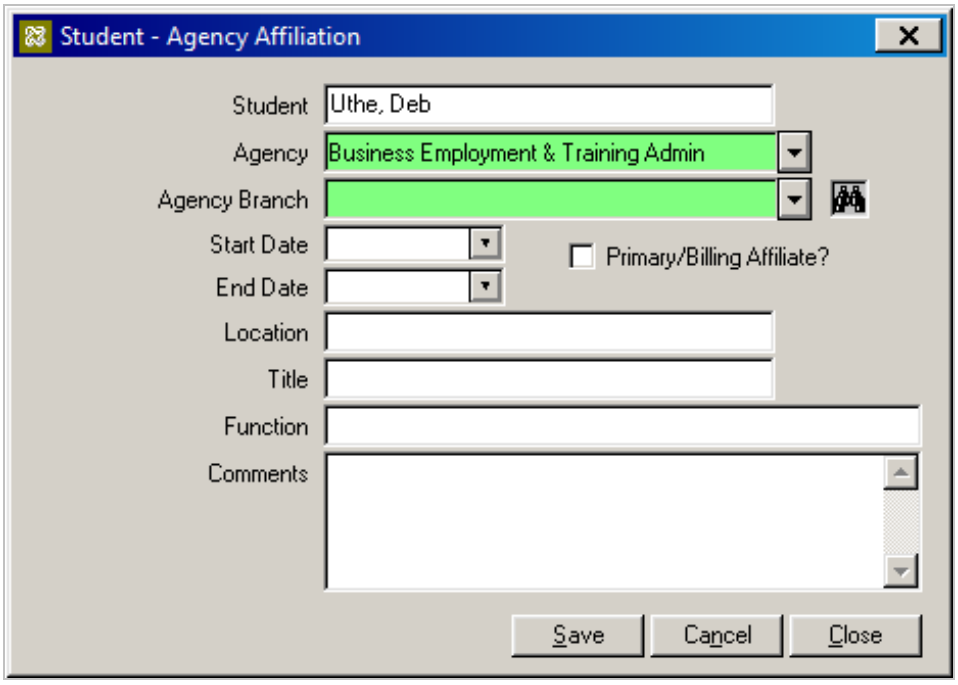
- If you select Student Payment, the Address field is displayed to the right of the payment options.



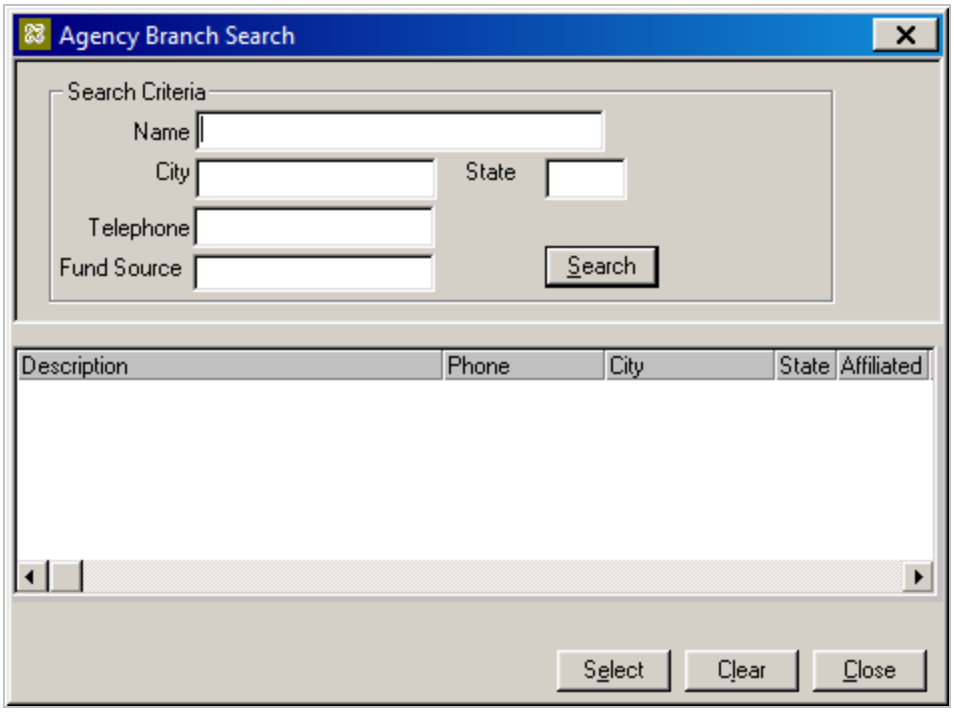
- If you select Agency Payment, the Agency and Agency Branch fields appear to the right of the payment options.


F/A Student Cash Payment/Other - Uthe, Deb
Student Payment
Agency Payment
Agency
Job Training Partnership Act
Agency Branch
South Florida Regional Office
Total Amount
121.00
# of Payments
3
Payment Amount
Interest Rate
0.000
First Payment Date
10/5/2006
Payment Frequency
Monthly
Days:
30
Status
A
Approved
Secondary Rate
Effective Date
Interest Only Until
Scheduled Payments
Payments Received
Refunds
Auto Draft
Comments
Calculate
Payment Amount
40.33
Last Payment Date
11/29/2007
Add Payment
Delete Payment
Date
Acad Year
Term
Payment
Principal
Interest
Balance
Status
10/5/2006
1
40.33
40.33
0.00
80.67
S
11/5/2006
1
40.33
40.33
0.00
40.34
S
12/5/2006
1
40.34
40.34
0.00
0.00
S
Select Payment Status
Cancel Payment
Specify Ac Yr Seq
Totals
Payment
121.00
Principal
121.00
Interest
0.00
Unpaid Balance
121.00
View Statement History
Save
Cancel
Close

a. Select an Agency.

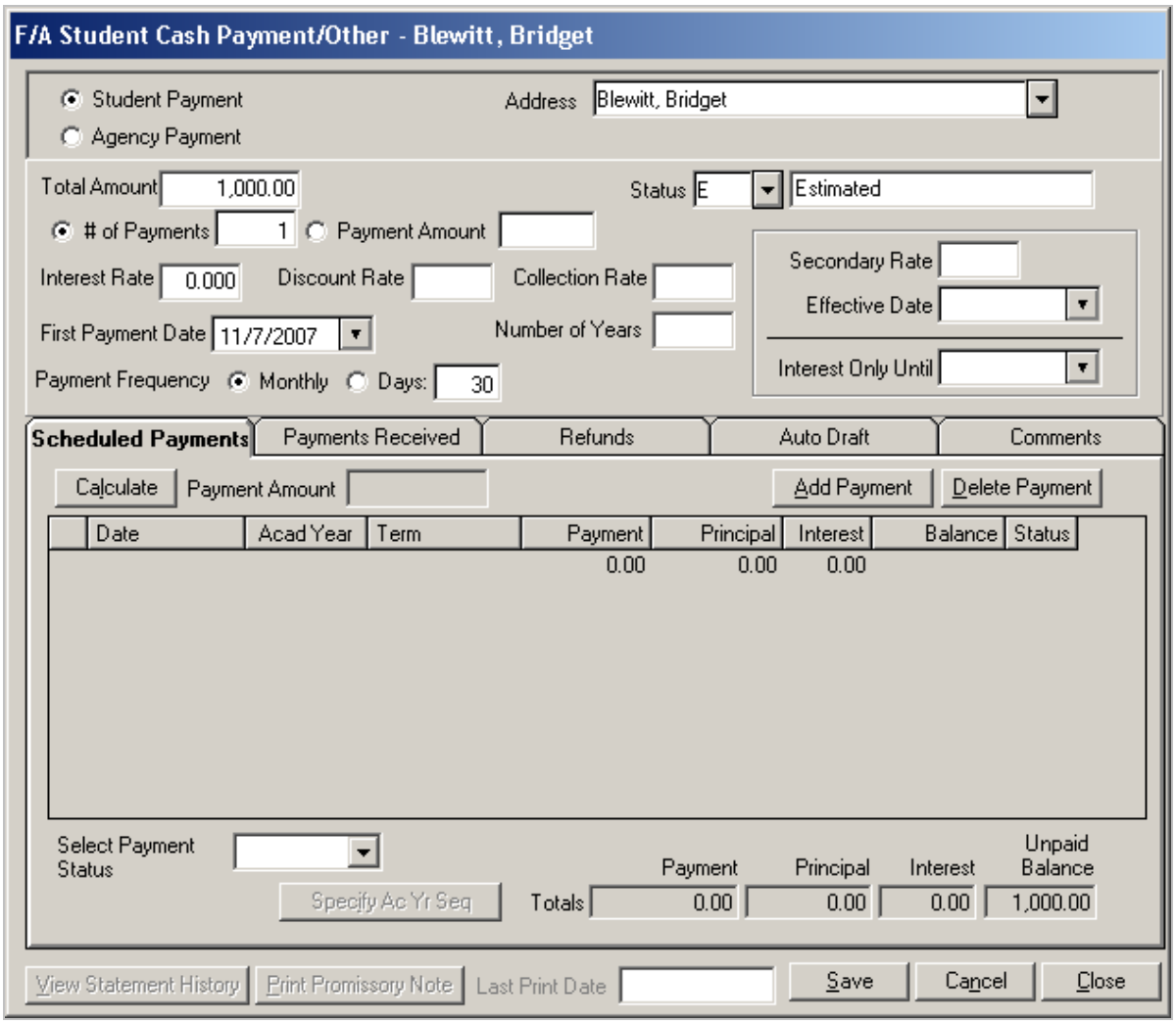


b. If you do not see the Agency Branch, click to display the Agency Branch Search form, specify search criteria, and click **Search**. The grid on the lists all agencies that match your search criteria. Double-click the agency you want to select.



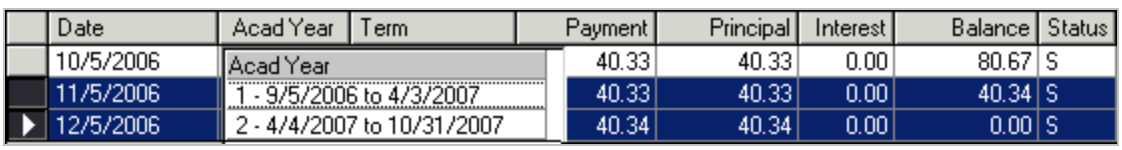
8. Complete the Basic Information fields and proceed to each of the tab's instructions below.
9. The **Number of Years**, **Discount Rate**, and **Collection Rate** field appear only when the configuration option "Use

Individual Institution Loan calculation" has been selected from the Fund Source Code Setup form. These fields are populated once the award is saved. If any of these values are missing, the loan will not be included in the 90/10 Report calculations. For more information, see the 90/10 Report Configuration options under Lists > Financial Aid Sources > Fund Source.



10. Click **Print Promissory Note** to print the promissory note. If the Allow Printing Promissory Note option has been activated for the campus and a location has been designated for custom reports, the custom promissory note is printed; otherwise, the standard promissory note is printed.

11. Click **Specify Ac Yr Seq** to change the academic year sequence on multiple disbursements instead of having to change each academic year individually. This feature does not apply for disbursements that have been paid or associated with an academic year where the COA is zero. Select multiple disbursements by holding down the **Shift** or **Ctrl** key and clicking on the disbursement. When you click **Specify Ac Yr Seq**, an academic year list is displayed. Double-click the desired academic year to apply the selected academic year to all selected disbursements.



Example: The **Academic Year** for the two selected disbursements was 1 before clicking **Specify Ac Yr Seq**. Then, **Academic Year 2** was selected from the drop-down list, and now the selected disbursements is assigned to **Academic Year 2**.

	Date	Acad Year	Term	Payment	Principal	Interest	Balance	Status
	10/5/2006	1		40.33	40.33	0.00	80.67	S
	11/5/2006	2		40.33	40.33	0.00	40.34	S
	12/5/2006	2		40.34	40.34	0.00	0.00	S

12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

    Notes:

    - When a payment schedule is saved, the Interest Balance and Principal Balance in the FA Student Aid table will be the sum of the respective interest and principal amounts in the grid where the status is S - Scheduled.
    - When you save an Agency payment schedule, and the student is not already affiliated with the agency branch, CampusNexus Student prompts you to create the affiliation between the student and the agency branch. Select **Yes** or **No**.

Field Descriptions - Basic Information

Field	Description
Address	Depending on the source selected above, this will be the student's address or the agency. If it is the agency, the form will also ask for the branch address.
Total Amount	Enter the total amount. The default amount is the amount entered on the FA Packaging form. The Total Amount field will show positive amounts only.
Number of Payments	Enter the number of payments that the source will make. You can choose to enter the number of payments or the amount of each payment. The calculation procedure will recognize your choice and calculate the other component.
Payment Amount	Enter the amount of each payment. You can choose to enter the number of payments or the amount of each payment. The calculation procedure will recognize your choice and calculate the other component.
Interest Rate	Enter the interest rate. Example: 3.00 is three percent. Negative interest rates are not allowed. Interest values are displayed with three decimal places.
First Payment Date	Enter the date that the first payment on the schedule is expected. See Payment Schedule Dates Calculations.
Payment Frequency	Select Monthly or Days. If you select Days, enter the number of days between payments (this value cannot exceed 365).
Status	Select Approved, Estimated, Pending, or Canceled. When you change a payment schedule to status C - Canceled, the remaining Scheduled disbursements are changed to status Canceled when you save the record.
Secondary Rate	Enter an optional secondary interest rate that applies as of the effective date below. These fields facilitate a "two-tiered" payment plan. Negative interest rates are not allowed. Interest values are displayed with three decimal places.

Field	Description
Effective Date	Enter the effective date of the secondary interest rate. The secondary rate is applied to the balance for payments after this date.
Interest Only Until	Enter a date until which the student will make interest payments only.

Scheduled Payments Tab

The Scheduled Payments tab shows the calculated schedule of payments based on the parameters shown on the top portion of the form. After entering the parameters, click **Calculate** to fill in the grid. After the calculation is performed, edit the individual payments if necessary. Enter the number of payments or the amount of each payment. The calculation procedure will recognize your choice and calculate the other component.

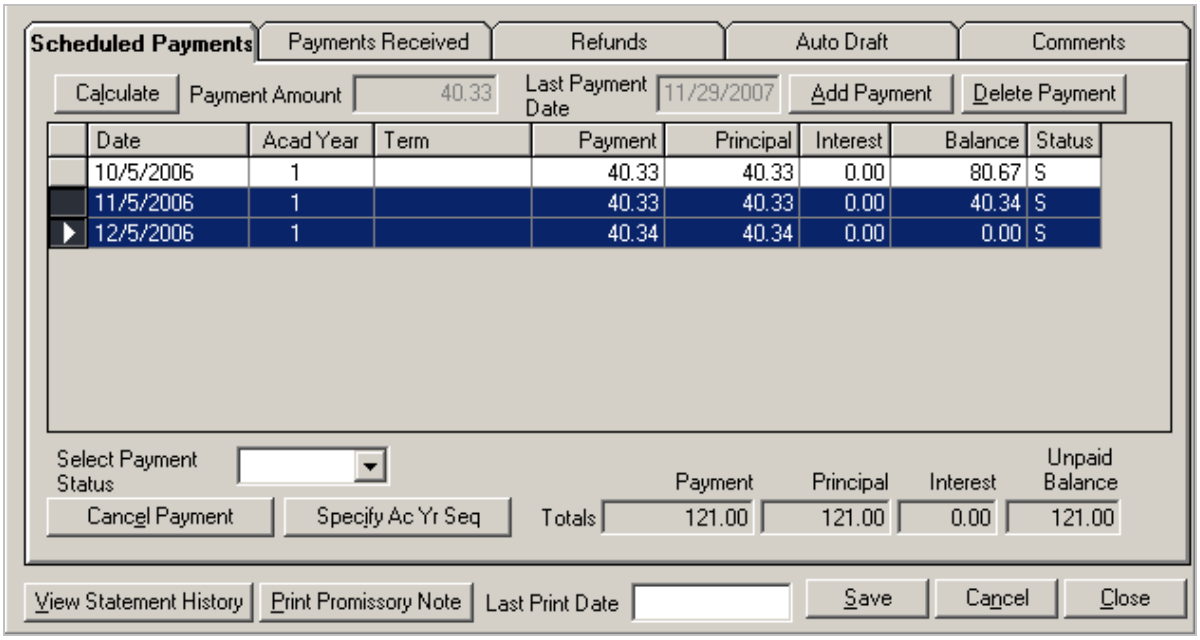
Note: The initial scheduling of any payment plan associated with a fund source type of cash/other uses the same amortization logic that is used when payments are posted.

The F/A Student Cash Payment/Other form allows a scheduled payment to be cancelled. It also allows you to modify an expected amount for a scheduled payment. When you click on the expected amount for a scheduled payment, you can edit the amount expected.

When you click the payment to edit, if the status of the payment is Scheduled (S), the **Cancel Payment** button is enabled. Click this button to cancel the payment. When the payment was cancelled, the button is labeled **Re-expect Payment**. When you select a different row, the button label is updated to **Cancel Payment**. If the selected disbursement was canceled, the button label is **Re-Expect**; otherwise, it is **Cancel**.

You can change the total amount of the payment schedule or the total number of payments to a larger number and then click **Recalculate**. The Recalculate button will not affect scheduled payments that have been received or canceled.

Type or select Scheduled Payments tab as follows:



Click **Calculate** to calculate the payment schedule from the data on the top portion of the form. The total amount is divided by the number of payments to determine the amount of each payment along with principal, interest, and balance amounts. If payments have been received, a message indicates that the payment amount may change for future payments. You have the option to continue or cancel.

Calculation of the payment amount expected must include the net amount for any scheduled payments that are past due. Calculation of the interest portion of the payment being made includes summing the interest amount of the payment being made, any accrued interest amount, and the interest amounts of any scheduled payments that are past due.

If the payment amount equals the scheduled payment amount, there is no change to the future scheduled payment amounts and the following formula is not executed. However, if the payment amount is under or over the amount expected, the logic to reamortize the principal balance is as follows:

Formula for Reamortization of Cash Payment Plans

First, the Constant Rate is calculated:

- If Payment Frequency is Monthly (Monthly Constant Rate)

  Constant Rate = (Interest Rate * 0.01) / 12

- If Payment Frequency is Days (Daily Constant Rate)

  Constant Rate = (Interest Rate * 0.01) / (365/Days)

  Next, the Payment Amount per period is calculated:

- If Interest Rate > 0

  Payment Amount = Outstanding Loan Amount * (1+Constant Rate) ^ Number of Remaining Disbursements / (((1+Constant Rate) ^ Number of Remaining Disbursements) - 1) / Constant Rate

- If Interest Rate = 0

  Payment Amount = Outstanding Loan Amount / Number of Remaining Disbursements

Outstanding Loan Amount = Total Amount Packaged - Principal Payments Received to Date

Interest Amount = Outstanding Loan Amount * Constant Rate

Principal Amount = Payment Amount - Interest Amount

Field Descriptions - Scheduled Payments Tab

Field	Description
Payment Amount	This field displays the calculated amount of each payment.
Add Payment	Click **Add Payment** to add a payment to the schedule. A new row is added in the grid. Enter the Date, Academic Year, Term, Principal, and Interest. The default date is today's date. CampusNexus Student updates the Payment and Balance totals when the Principal and Interest columns are changed.
Delete Payment	Select a row in the grid and click **Delete Payment** to remove a payment from the schedule. When a payment is deleted,CampusNexus Student updates the balance calculation for subsequent payments.
Date (expected)	Expected due date of each payment based on the entered parameters.

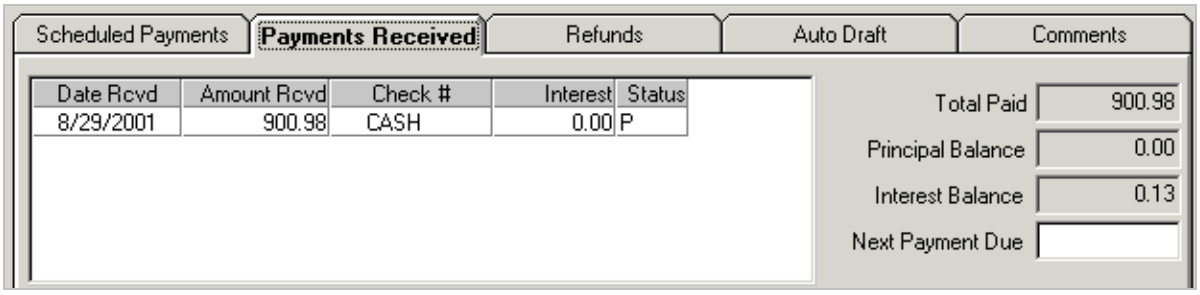
Field	Description
Acad Year	Academic year number to which the disbursement applies. You can edit the academic year for each disbursement if the disbursement passes the criteria required for editing the field. If it can be edited, a drop-down list is displayed showing each academic year for the student's enrollment. Each record displayed in the list shows the academic year number, academic year start date, and academic year end date. When new scheduled payments are added for the Cash/Other payment schedule, CampusNexus Student sets defaults for the academic year for each scheduled payment to the academic year being packaged. Scheduled payments are created when **Calculate** is clicked.
Term	Term to which each payment applies. It is entered at the time the payment is received. Enter the term code or select it from the drop-down list. **Agency Payment**: If the 'Associate Course with Payment' flag is for Agencies of Cash or Other fund source type, the Term and Course fields are related fields. In other words, if a Term is selected, *only* the Courses associated with the Term appear in the Course field. Alternatively, if a Course is selected, *only* the Terms associated with the Course selected appear in the Term list.
Course	**Agency Payment**: This field is displayed only if the 'Associate Course with Payment' flag is enabled for Agencies of Cash or Other fund source type. The field represents the course associated with each payment. It is selected from the Course list at the time the payment is received. If the Course field is displayed, the Term field are related field. In other words, if a Term is selected, *only* the Courses associated with the Term appear in the Course list. Alternatively, if a Course is selected, *only* the Terms associated with the Course appear in the Term list.
Payment	Read-only. This amount is calculated based on the entered parameters. If the total amount is not evenly divisible by the number of payments, the last payment may be slightly different from the other payments due to rounding.
Principal	Read-only. This is the portion of each payment that is applied to principal.
Interest	Read-only. This is the amount of each payment that is applied to interest.
Balance	Read-only. This is the balance due after each payment is made.
Status	Read-only. This is the status of each payment. Statuses can be Scheduled (S), Ready to Pay (R), Paid (P), or Cancelled (C).

Field	Description
Select Payment Status	This option allows institutions to select one, multiple, or all canceled or scheduled payments. This field is initially displayed on the form as blank and cannot be edited. There are two options for selection: Canceled or Scheduled. This field also drives the functionality of the Cancel Payment/Re-expect Payment button: • When the Select Payment Status option of Canceled is selected, CampusNexus Student highlights any payments in the grid that have a 'C' (Canceled) in the Status column and the button is set to 'Re-expect Payment'. If there are no Canceled payments, the button is still set to 'Re-expect Payment'. • When the Select Payment Status option of Scheduled is selected,CampusNexus Student highlights any payments in the grid that have a 'S' (Scheduled) in the Status column and the button is set to 'Cancel Payment'. If there are no Scheduled payments, the button is still set to 'Cancel Payment'. You can use the Ctrl or Shift keys, in conjunction with a mouse click, to select multiple payments.
Totals	Read-only. These are the totals of the Payment, Principal, Interest, and Balance columns on the grid. Users can move the alignment of the columns in the grid. Thus, the alignment of the totals below the related columns is only valid for the default grid configuration.

Payments Received Tab

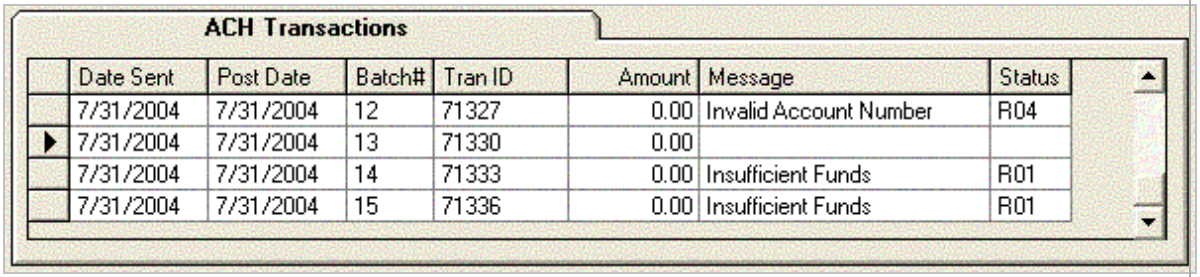
The Payments Received tab lists payments received from the student or agency. The fields are read-only .

Payments are posted in Student Accounts or from the Post Payment button on the Ledger Card.



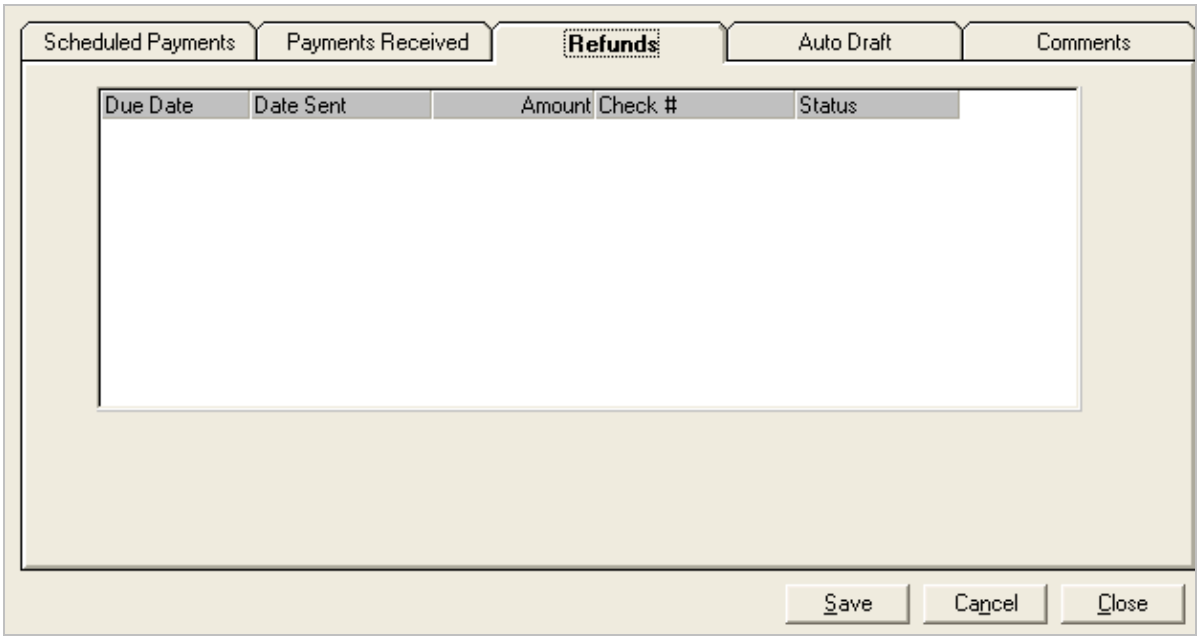
Field Descriptions - Payments Received Tab

Field	Description
Date Received	Date on which the payment is received
Amount Received	Dollar amount that was received
Check Number	Number of the check used for the payment
Interest	Portion of the payment that was applied to interest

Field	Description
Status	Indicates whether Paid (P) or Void (V).
Total Paid	Total amount of the scheduled payment paid to date
Principal Balance	Balance of the principal that remains to be paid
Interest Balance	Balance of the interest that remains to be paid
Next Payment Due	Due date of the next scheduled payment
ACH Transactions	This sub-tab serves as an audit trail. It displays all imported and exported ACH transactions. Transaction data includes Post Date, Batch #, Transaction ID, Amount, Message and Status (Response Code). 

Refunds Tab

It is sometimes necessary to refund all or part of student payments. Refunds may be necessary when a student drops out of school. Refunds are processed in Student Accounts under Daily > Student Accounts > Post Individual Refunds. Refunds can also be posted from the student's ledger card by clicking Post Refunds. The fields on this tab are read-only.



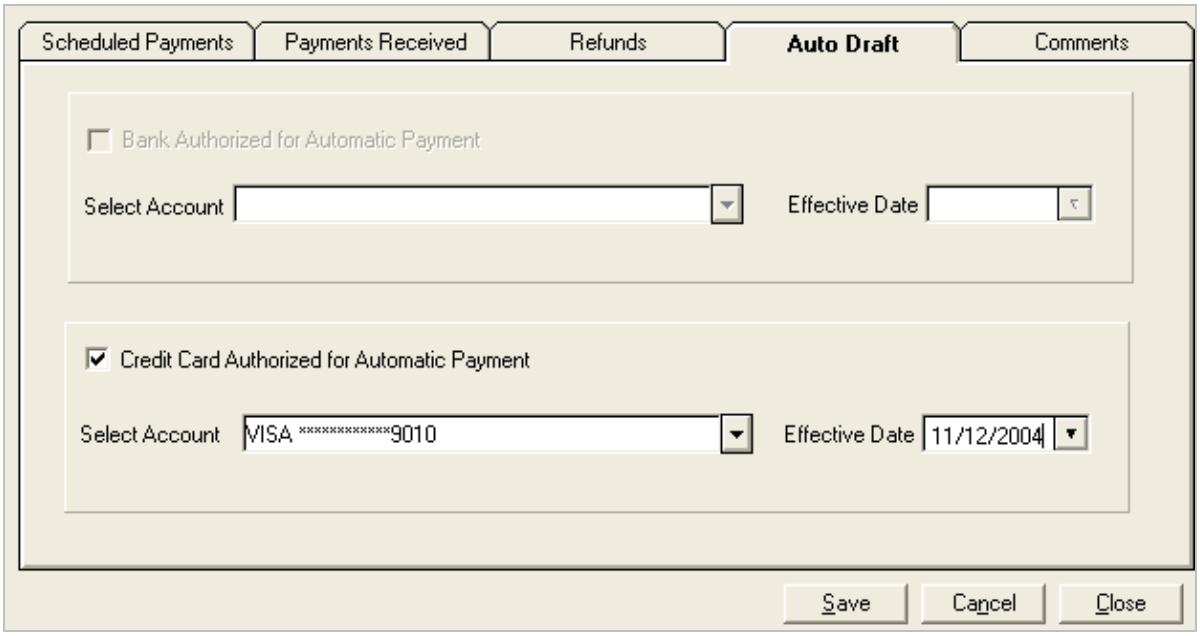
Field Descriptions - Refunds Tab

Field	Description
Due Date	Date that the refund is due to be sent to the student or agency
Date Sent	Date that the refund check was sent to the student or agency
Amount	Amount of the refund
Check Number	Number of the refund check
Status	Status of the refund. Status options include Scheduled, Approved, Paid, Cancelled.

Auto Draft Tab

This tab enables you to select the appropriate student bank account or credit card account for auto drafts.

Select the **Authorized** check box and then select appropriate values from the **Select Account** and **Effective Date** lists. If Auto Withdrawal is not authorized, the lists are unavailable.



Comments Tab

Click the **Comments** tab to view, edit, or add comments. The Comments field holds 1000 alphanumeric characters.

Other Grant/Scholarship Form

This form is used to set up grants or scholarships other than Pell grants. Student eligibility for a grant or scholarship is determined by your institution or the fund source.

The number of disbursements and percentage disbursed in each disbursement are set up under Lists > Financial Aid > Academic Years. You can change these parameters in this form to deal with exceptions to the normal practice.

When a student is dropped, financial aid is cancelled. If the student is reinstated, financial aid must be "re-expected". Scheduled disbursements are not automatically changed back to scheduled. Review scheduled disbursements for each fund source to "re-expect" the disbursements that still apply.

Notes:

When an Award status is set to "Canceled" , the disbursements associated with the award will also be set to a status of "Canceled". Under these conditions the disbursements may not be added or re-expected.

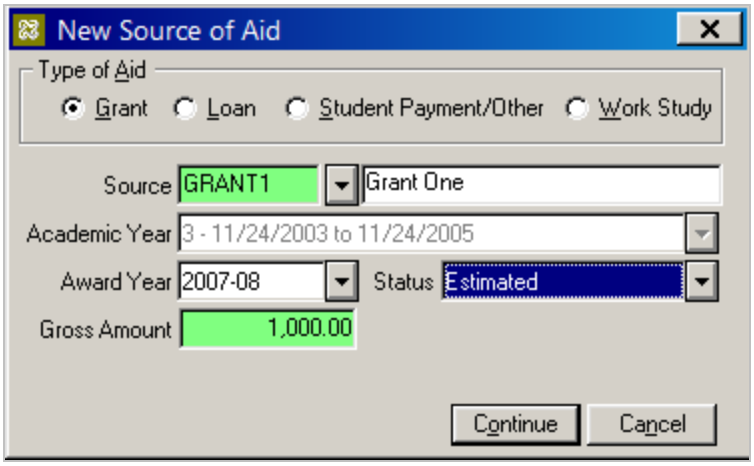
- If the **Add** button is selected, the following message is displayed: *"Cannot add disbursement to a canceled Award."*
- If the **Re-Expect** button is selected, the following message is displayed: *"Cannot Re-Expect a disbursement while the Award is in "Canceled" status. Select a new Award Status and try again."*

You may not "Calculate" or "Recalculate" disbursements.

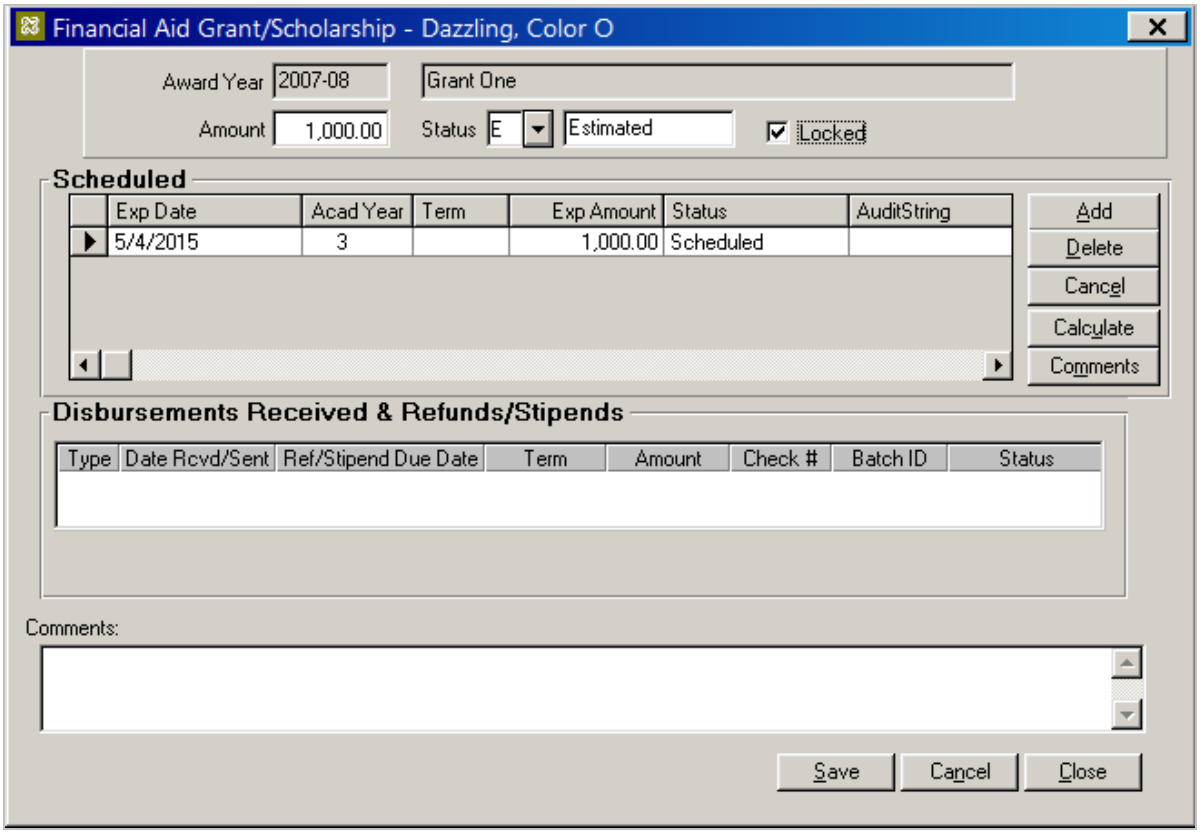
- If the **Calculate** or **Recalculate** buttons are selected, the following message is displayed: *"Cannot Calculate disbursements while Award is in "Canceled" status. Select a new Award Status and try again."*

To work with the Financial Aid Grant/Scholarship form:

1. Select a student.
2. Navigate to **View > Financial Aid > Packaging**. The Financial Aid Packaging form is displayed.
3. Double- click the academic year for which the payment is required, or select it and click **Edit**. The Financial Aid Academic Year form is displayed.
4. Click **Package**. The Financial Aid Packaging Form is displayed. Any existing fund sources including grants and scholarships are listed on the grid in the upper left portion of the form.
5. Click **Add** to add a new grant schedule. The New Source of Aid Form is displayed.
6. Select the **Source**, the **Award Year**, and **Status**. Enter the **Gross Amount**. If the status is Estimated, CampusNexus Student will not calculate a disbursement schedule on the next form.



7. Click **Continue**. The Financial Aid Grant/Scholarship form is displayed.



8. Enter or change data on the top section of the form as required.

Field Descriptions

Field	Description
Award Year	Award Year that you selected on the Financial Aid A/Y form.

Field	Description
Amount	Amount that the student is eligible to receive.
Status	Status of this grant/scholarship award. The status options are: • **A** - Approved • **C** - Canceled • **E** - Estimated • **P** - Pending Approval Canceled status: • When a user cancels a grant/scholarship disbursement, CampusNexus Student checks if all other disbursements for the award are in canceled statuses. If so, the status for the grant/scholarship award is changed to "Canceled". • If at least one disbursement of a grant/scholarship award has a status of "Paid" or "Ready to Pay", the "Cancel" option is not available in the Status drop-down list. • The status for all disbursements associated with a grant/scholarship award is set to "Canceled" if a user cancels the award. • If the grant/scholarship origination status is "Ready to Send", the status is changed to "Not Ready to Send" if the award has been canceled. • When a student's institution status is changed to a never attended status, the grant/scholarship status is changed to "Canceled" and the grant/scholarship origination status is "Ready to Send", the status is changed to "Not Ready to Send" if all associated disbursements have a canceled status.

9. Click **Add** to add scheduled disbursements. Enter the date and term for each disbursement.
10. If the status is Estimated, CampusNexus Student does not automatically calculate a disbursement schedule when the grant is added. You can initiate the disbursement schedule by clicking **Calculate**. The disbursements are calculated based on the data entered in the top of the form and the number of scheduled disbursements listed. The listed disbursements are updated as approvals are processed and payments are made.

    Scheduled disbursements are created when the status on the New Aid form is selected as *Approved* or *Pending*, or when the **Add** or **Calculate** buttons are clicked on the Financial Aid Grant/Scholarship form. The Scheduled Disbursement list is not created when new aid is added with a status of *Estimated*. Individual disbursements with a status of *Paid* or *Cancelled* cannot be edited.

    When FA disbursements are posted as received on the student's ledger card from the Student Accounts Payments form or from the Post FA Disbursements form, CampusNexus Student updates the Student Academic Year ID column in the FA Disbursements table.

    CampusNexus Student divides the total amount by the number of scheduled disbursements to determine the amount of each disbursement. CampusNexus Student calculates the distribution of disbursements when adding a new grant. For example, when adding a grant designated to have three disbursements, CampusNexus Student rounds up the first disbursement so that the distribution is 34%, 33%, and 33%.

    The Disbursements Received & Refunds/Stipends grid is read-only. It lists the disbursements received, refunds made to the fund source, and stipends paid to the student. The grid displays information from transactions that have been processed in the Student Accounts department.
11. Click **Comments** to enter or edit comments. The comments field holds 1000 characters of information.

12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

COD Grants

Pell, ACG, SMART, and TEACH grants are considered COD grants.

To manage COD grants:

1. Select a student.
2. Navigate to **View > Financial Aid > Awards**. The Financial Aid Packaging form is displayed.
3. Click **Add** to add a new COD grant or select an existing COD grant and click **Edit** to modify the award.
4. The New Source of Aid form is displayed. Select the COD fund source and fill in the fields in the form.
5. Click **Continue**.

   If the Pell Grant was selected, see Pell Grant form for instructions; otherwise, see ACG Grant, SMART Grant, or TEACH Grant.
6. The Financial Aid (COD Grant) form is displayed. In addition to information fields in the top portion of the form, the following tabs are displayed:

   - Scheduled Disbursements
   - Received Funds/Stipends
   - Comments
7. Enter or change data on the top portion of the form as required. Refer to the parameters below for specific information about each field.
8. On the Sched Disb tab, click **Calculate** to calculate the amount of each disbursement.
9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

CampusNexus Student checks for an ISIR on file before writing the Origination ID. If an ISIR is on file, the student COD grant Transaction ID is populated from the ISIR record. CampusNexus Student gets the first 11 characters from this field and populates the student COD grant Origination ID field.

ACG Grant

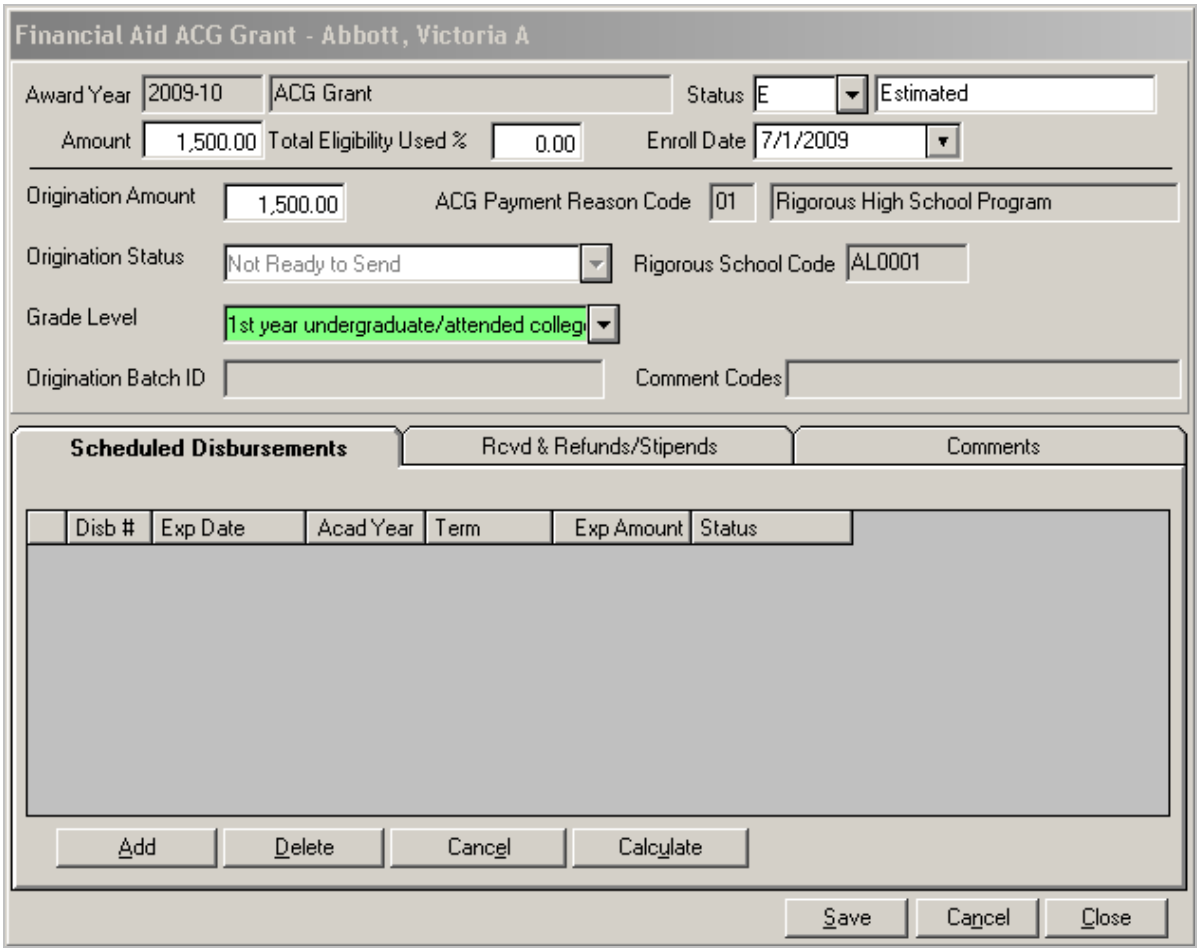
ACG Grants are offered to 1st and 2nd year students that meet the following requirements:

- They are U.S. Citizens or eligible non-citizens.
- The attended a Rigorous High School Program.
- They are attending at least half time.

If the student level code is '0' or '1' (1st year), the maximum Award amount cannot exceed $750.

If the student level code is '2' (2nd year), the maximum Award cannot exceed $1,300.

Note: For Award Years 2008-09 and prior, the **Student Level** field is displayed and an Academic Year can be selected.



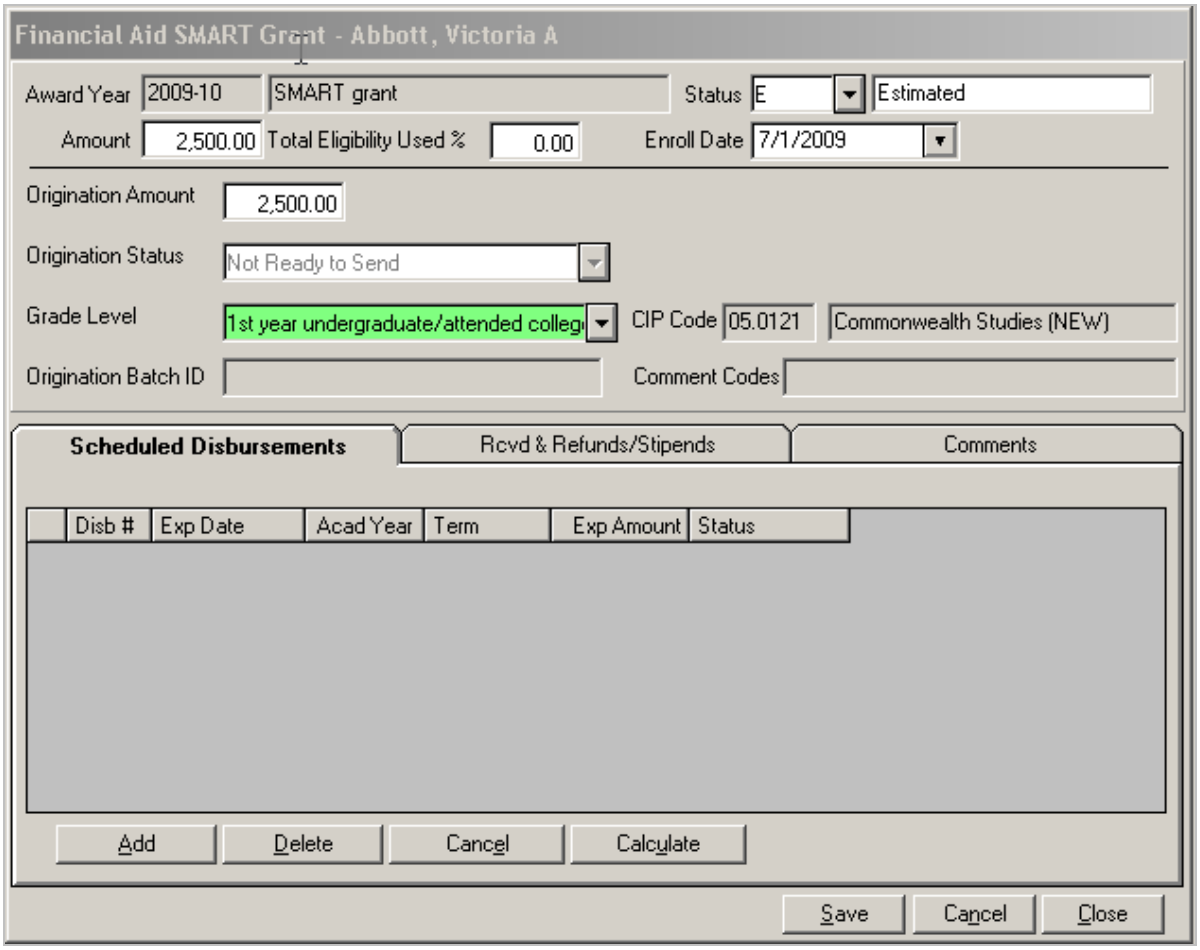
SMART Grant

SMART Grants are offered to 3rd, 4th, and 5th year students that meet the following requirements:

- They are U.S. Citizens or eligible non-citizens.
- They are enrolled in a program that is associated with approved CIP codes.
- They are attending at least half time.

The maximum allowable allocation per year is $4,000.00.

Note: For Award Years 2008-09 and prior, the **Student Level** field is displayed and an Academic Year can be selected.

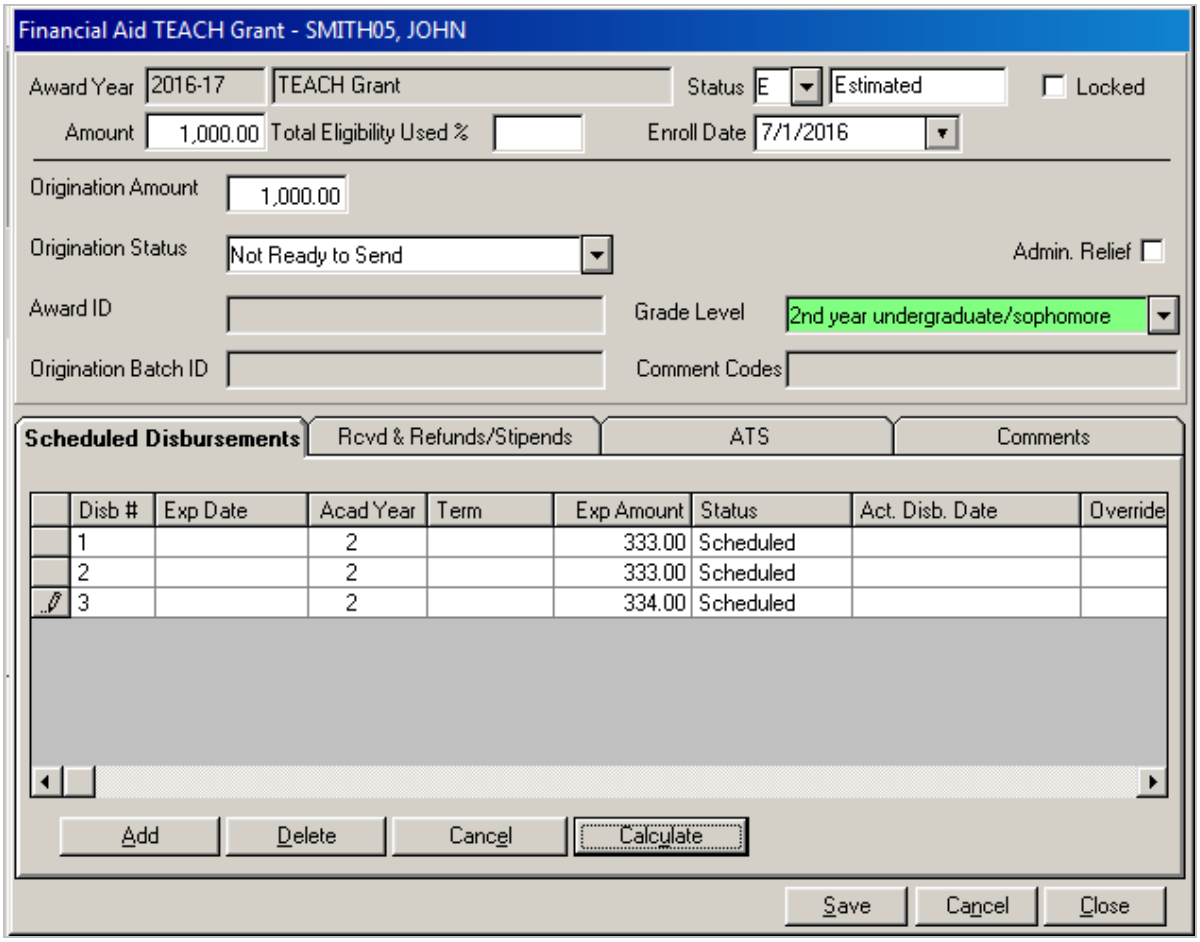


TEACH Grant

TEACH Grants are offered to students who intend to teach in a public or private elementary or secondary school that serves students from low income families. They must be U.S. Citizens or eligible non-citizens.

The maximum allowable allocation per year is $4,000. Eligible undergraduate and post-baccalaureate students may receive up to an aggregate limit of $16,000 and graduate students may receive up to a graduate aggregate limit of $8,000 in TEACH grants.

TEACH Grant awards are validated to ensure that if the earliest disbursement occurred after March 1, 2013, the maximum amount packaged is reduced as required in the sequestration legislation. Any institution that has disbursed TEACH funds to students with the earliest disbursement after March 1, 2013 using the per-sequester maximum award amounts must recalculate the TEACH Grant award amounts for upcoming payment periods based on the latest announced parameters.



Field Descriptions (top section of the form)

Field	Description
Award Year	Award Year selected on the Financial Aid A/Y form.
Amount	Amount that the student is eligible to receive.

Field	Description
Status	Status of the COD Grant. The status options are: • **A** - Approved • **C** - Canceled • **E** - Estimated • **P** - Pending Approval Canceled status: • When a user cancels a COD disbursement, CampusNexus Student checks if all other disbursements for the award are in canceled statuses. If so, the status for the COD award is changed to "Canceled". • If at least one disbursement of a COD award has a status of "Paid" or "Ready to Pay", the "Cancel" option is not available in the Status drop-down list. • The status for all disbursements associated with a COD award is set to "Canceled" if a user cancels the award. • If the COD origination status is "Ready to Send", the status is changed to "Not Ready to Send" if the award has been canceled. • When a student's institution status is changed to a never attended status, the COD status is changed to "Canceled" and the COD origination status is "Ready to Send", the status is changed to "Not Ready to Send" if all associated disbursements have a canceled status. Once a COD Grant is approved and batched to send to COD, you cannot make changes that would affect the batched data.
Locked	Enables users to lock or unlock a fund source, preventing or allowing changes to that Title IV fund source.
Total Eligibility Used %	This read-only field displays a percentage representing the eligibility that the student has used. This field is updated when the COD record for the grant is imported from COD.
Enroll Date	The enroll date must occur within the COD Grant Award Year. • If the student's enrollment date occurs *after* July 1 of the COD Grant Award Year, this field contains the date from the enrollment record . • If the student's enrollment date occurs *before* July 1 of the COD Grant Award Year, this field contains the July 1 date of that year.
# of Payment Periods in A/Y	Enter the number of payment periods in the academic year. The default comes from the Academic Year Setup. The maximum is 15. **Note**: Financial Aid award years begin on July 1st and end on June 30th. When COD or campus-based funds are awarded to a student, CampusNexus Student evaluates all scheduled disbursements for the award. • If any scheduled disbursement is dated is after the June 30th deadline, CampusNexus Student prevents the disbursement from being counted as part of the award. • If a disbursement date is after June 30th, students must complete another FAFSA for the following award year and the disbursement will be paid from that award year.

Field	Description
Origination Status	Select the origination status of this COD Grant. The options are: • **A** - Accepted • **B** - Batched to Send • **E** - Error/Rejected • **N** - Not Ready to Send • **R** - Ready to Send • **Blank** - Not on File This field can be edited only if a new Pell Grant is being added or if the value is blank, **N**, **R**, or **E**. When you **add** a COD Grant, the default status is 'Not Ready to Send' (No ISIR). The conditions under which the Origination Status may be set to 'Ready to Send' depends on your institution's policies. CampusNexus Student has a default setting that prevents the Origination Status from being set to 'Ready to Send' unless an ISIR has been received and the COD Grant Status is Approved. With this setting the Origination Status cannot be changed to 'Ready to Send' until the ISIR Received Date has been populated by CampusNexus Student (when an ISIR is received); however, if your institution has enabled the 'Originate/Certify Estimated Awards' option, you can set the Origination Status to 'Ready to Send' when the Award Status is 'E' (Estimated), 'P' (Pending Approval), or 'A' (Approved). When you modify the verification status, you are prompted to set Origination Status to 'Ready to Send'. The verification status field displayed on the Student Packaging form is included in the COD origination files transmitted for acknowledgment. A change in verification status will cause a prompt to ask if you would like to set the Origination status to 'Ready to Send'. The prompt is displayed if the following conditions are met: 1. CampusNexus Student determines the award year selected on the form. If the Origination status is **A**, the following message is displayed: *COD Origination Has Changed. Change the Origination Status to Ready to Send? Yes or No.* 2. If your response is **Yes**, CampusNexus Student sets the Origination status to **R**. Otherwise, no change is made. After you export originations, CampusNexus Student sets the origination status to **B** - 'Batched to Send'. When a COD Grant origination status is Batched, you are not allowed to modify any of the information regarding the origination. After the COD Grant origination records are sent to COD, if changes are made to the student's data records that affect the COD origination, CampusNexus Student captures the changes and prepares records to be exported to COD. The COD Grant record is considered to be originated if the Origination status is **A**, **B**, or **E**. If the COD grant record has already been originated (COD), and you change the Weeks Enrolled in AY on the Academic Year form, you will be prompted to change the origination status to **R**.
Origination Amount	Saving the form will only overwrite the origination amount when you change it. If the origination is accepted, changing the origination amount will prompt you to set the status to Ready. This change was made to allow two scheduled COD Grants for the same award year. These changes will accurately reflect on the related origination record.

Field	Description
Admin. Relief	If an institution has been granted Administrative Relief, selecting this check box ensures that records for the award year are included in the COD Export process. **Note:** This check box only appears when Financial Aid Automation is enabled.
Grade Level	See Grade Level.
Origination Batch ID	CampusNexus Student populates this field.

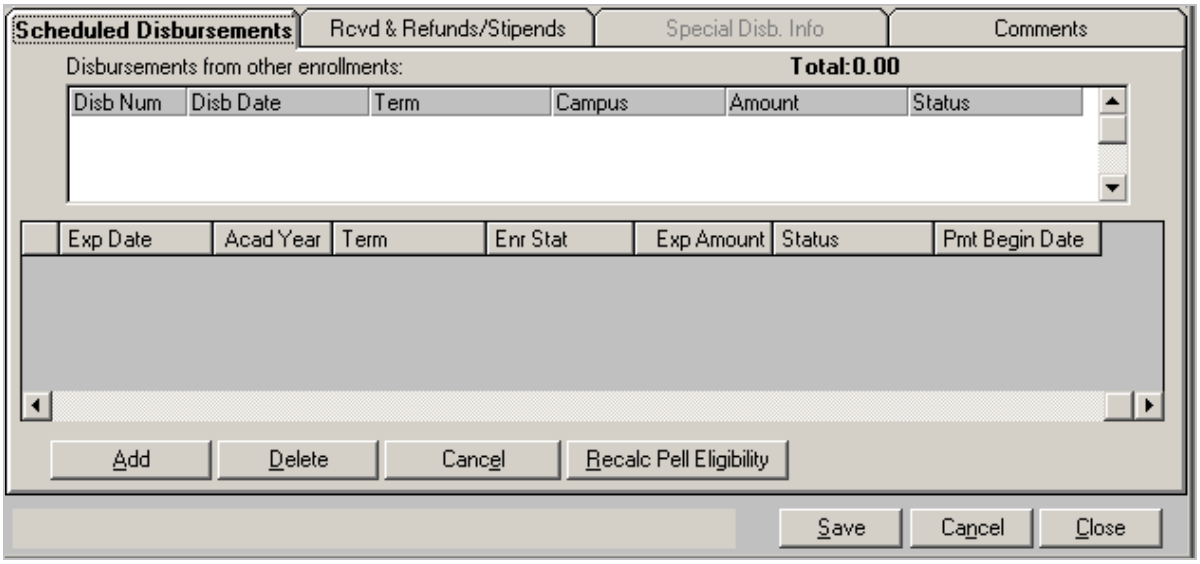
Scheduled Disbursements Tab

The Scheduled Disbursements tab lists the COD Grant disbursements for the selected award year. The disbursements are calculated based on the data entered in the top half of the form. If the status of the COD Grant is Estimated, CampusNexus Student will not automatically calculate a disbursement schedule. You can initiate the disbursement schedule by clicking Calculate or by adding a new scheduled disbursement to the list. The listed disbursements are updated as approvals are processed and payments are made.

Scheduled disbursements are created when the status on the New Aid form is selected as Approved or Pending, OR when the Add or Calculate tabs are clicked on the COD Grant form. The Scheduled Disbursement list is not created when new aid is added with a status of Estimated. Individual disbursements with a status of Paid or Cancelled cannot be edited.

When FA disbursements are posted as received on the student's ledger card from the Student Accounts Payments form or from the Post FA Disbursements form, CampusNexus Student updates the Student Academic Year ID column in the FA Disbursements table.

When a student is dropped, financial aid is canceled. If the student is reinstated, financial aid must be re-expected. Scheduled disbursements are not automatically changed back to Scheduled. Review scheduled disbursements for each fund source to re-expect the disbursements that still apply.



Field Descriptions - Scheduled Disbursements Tab

Field	Description
Disbursement Number	The disbursement number for this row.

Field	Description
Exp Date	The date on which the grant disbursement is due to be paid.
Acad Year	The academic year number to which the disbursement applies. You can edit the academic year for each disbursement if the disbursement passes the criteria required for editing. If you edit this field, a drop-down list is displayed. Each row in the drop-down list shows the academic year number, start date, and end date. When new scheduled disbursements are added for the COD Grant, CampusNexus Student defaults the academic year for each disbursement to the academic year being packaged.
Term	Type the term code or select it from the drop-down list. This is the term to which the disbursement is related. When you click in the field on the grid, a drop-down button becomes available. Click the button to see a list of terms from which you can select. The Term code can be edited only for disbursements that have a status of Scheduled (**S**).

Field	Description
Enr Stat/Hours	If the ProgramVersion.ClockCredit value is CCredit Hours, the column heading is Enr Stat. The value of this column is displayed from and stored to FaSched.EnrollmentStatus. This is a required field for Credit Hour institutions. The program stores zero to ClockHours and does not display the ClockHours column. The Enr Stat column is a combo box from which you can select • **F** - Full Time (default) • **Q** - Three Quarter Time • **H** - Half Time • **L** - Less Than Half Time • **U** - Undetermined. If the ProgramVersion.ClockCredit value is HClock Hours, the column heading is Hours. The value of this column is displayed from and stored to FaSched.ClockHours. This is a required field for Clock Hour institutions. The program stores F to Enrollment Status and does not display the enrollment status column. Total CLOCK Hours for all disbursements must add up to the Clock hours for the Academic Year (FaStudentAY). When you click **Recalc Pell Eligibility**, CampusNexus Student uses the FaPell.CalculateFullPellGrant method to find the full COD grant amount for the students EFC and COA. Then, CampusNexus Student calculates each disbursement using this Full Amount as the beginning total award value. After the calculation is complete, CampusNexus Student goes through each disbursement. **For CREDIT Hour programs:** If the Enrollment Status for the Disbursement is: • **F**: LEAVE AS IS • **U**: LEAVE AS IS • **Q**: Disbursement = Disbursement * 0.75 • **H**: Disbursement = Disbursement * 0.50 • **L**: Disbursement = Disbursement * 0.25 **For CLOCK Hour programs:** CampusNexus Student uses the method FaPell.ProRatePell to get the COD grant Amount, then splits the COD grant Amount out into the disbursements using the ClockHours for each disbursement to determine the amount. For example, IF: • FaStudentAY.CreditHoursExpToComplete = 800 • DISB 1 = 300 hours • DISB 2 = 300 hours • DISB 3 = 200 hours • Pell AMOUNT = 2400 Then, the result would be: • DISB 1 Amount = 900.00

Field	Description
	• DISB 2 Amount = 900.00 • DISB 3 Amount = 600.00
Exp Amount	This is the Expected Amount of the disbursement. It is calculated by dividing the total amount of the grant by the number of payment periods in the academic year. When disbursement amounts cannot be divided evenly, the first payment should be the highest. The calculation of the COD grant Amount has been modified to distribute the highest portion first. For example: • A $2,000 award will be disbursed as $667, $667, and $666. • A $1,000 award will be disbursed as $334, $333, and $333. In addition, the AUTO-PACKAGE routine was modified to use the same calculation method.
Status	The status of the grant disbursement. The statuses include Scheduled, Ready to Pay, Paid, and Cancelled.
Pmt Begin Date	Date of first payment.
Act Disb Date	The Automated COD Export Process allows you to configure if the COD Export Process should exclude Holidays and/or Weekends when determining the Actual Disbursement Date (calculation) that is reported to COD for the day disbursements are to be paid. **When Automated Processes is activated**, authorized users can view the calculated date in the Act Disb Date column on the Financial Aid ACG Grant screen. If neither option is selected, NA is displayed in this column.
Override Disb. Date	This column displays the updated disbursement date if **Override Disbursements date with** was selected in the COD Export wizard. The column is not displayed for previously created awards.

Rcvd & Refunds/Stipends Tab

The Rcvd & Refunds/Stipends tab lists the receipts of COD Grant disbursements from COD for the student. It also lists any COD refund transactions that have been processed for this student and any stipends paid to the student from COD Grant funds. The grid displays information from transactions that have been processed in the Student Accounts department. No changes to this grid can be made on this form.

The bottom portion of the Received & Refunds/Stipends section displays traffic related to this student between your school and the COD. Stipends are not part of the school/COD traffic. The records under **Received & Refunds/Stipends** should agree with the records under **Disbursements at COD**. If they do not agree, you can add an adjustment transaction to balance the two sets of records. Any adjustment record you add will be picked up by CampusNexus Student and written to a file for transmission to COD. Exporting and importing of records related to Pell Grants is handled under Daily operations. Those procedures are described in other Help system topics.

Direct Loan disbursement/adjustment records for award years 2014-15 and forward have been updated to display the Enrollment Status, Payment Period Start Date, and CIP code in the Disbursements at COD section of the award. TEACH Grant disbursement/adjustment records have been updated to display the Enrollment Status, and CIP code in the Disbursements at COD section of the award. They are now displayed in the additional columns that a user can scroll to the right to view in the Disbursements at COD section.

Field Descriptions - Rcvd & Refunds/Stipends Tab

Field	Description
Received/Refunds List	
Type	The type of entry on the list. D - Disbursement Received, R - Refund, or S - Stipend.
Date Rcvd/Sent	The date that the disbursement was received, the refund was sent, or the stipend was paid.
Ref/Stip Due Date	The date that the refund is due to be sent to COD for the date the stipend is scheduled to be paid to the student.
Term	The term to which the transaction is related.
Amount	The amount of the transaction.
Check #	The check number or EFT number of the transaction.
Pmt Per#	Payment period associated with the disbursement.
Date Deposited	The date that a receipt was deposited to the bank.
Date Signed	The date on which the student signed for the disbursement received.
Batch ID	The ID of the batch in which the transaction was processed.
Status	The status of the transaction: Approved, Paid, Sent, etc.
Disbursements at COD	
Disb #	The disbursement number for this row.
Disb Sequence	The order in which disbursements are to be made.
Disb Date	The date the disbursement was disbursed by COD.
Amount	The amount of the transaction that was sent to COD.
COD Status	This is the status of the transaction at COD. Statuses include Corrected, Rejected, Verification, Batched.
YTD Amt Accepted	The total year-to-date Pell amount accepted by COD.
Previous Seq #	The record number for the previous transaction associated with the disbursement, as provided by COD.
Export Batch ID	The number of the batch in which the transaction was exported to COD.
COD Comment Codes	A list of all COD edit (comment) codes associated with the Export Batch.
Enrollment Status	The student's enrollment status at the time the record was created. (Academic Year 2014-15 and Forward)
CIP Code	Program CIP Code associated with the disbursement or adjustment. (Academic Year 2014-15 and Forward)

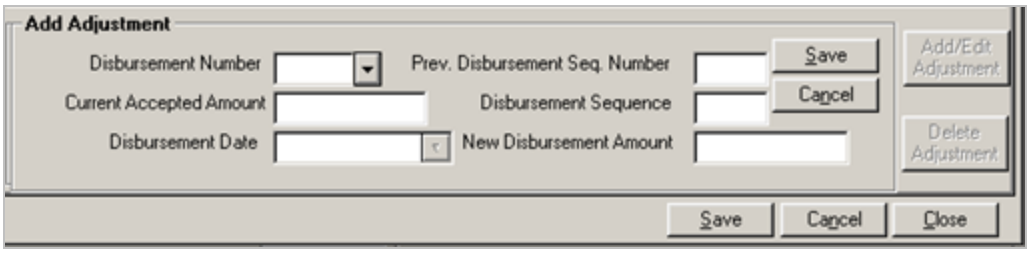
Click **Delete Adjustment** to remove an adjustment transaction from the table before it is sent to COD.

Click **Add Adjustment** to create a transaction adjusting a disbursement. The transaction will be picked up and sent to COD using export procedures under the Daily menu.

The Add Adjustment form is used to enter adjustment data. The **Disb. Reference Number** refers to the number of the disbursement to which the adjustment applies. **Total Accepted Disb. Amount** shows the disbursement amount accepted by COD.

Enter the **Adjustment Date** and **Adjustment Amount**, then click **Save** to save your adjustment transaction. Once saved, procedures under the Daily menu will be used to export the adjustment to COD.

CampusNexus Student permits disbursement adjustments only if the origination status is **A** - accepted, **B** - batched, or **C** - corrected (Accepted) and the disbursement has been released to COD.



Note: The Disbursement Amount field is populated manually. All other data on this form is retrieved from the Disbursements At COD Rcvd & Refunds/Stipends tab.

Special Disb. Info Tab

Note: The Special Disb. Info tab is disabled if the award year for the Pell is 2001-02 or later. It will continue to be shown for earlier award years.

This option is only applicable to an institution if it is required to do special disbursement reporting. If your institution is required to do special disbursement reporting, it will be noted on this form by a **Yes** beside the question "Enter Special Disb Info?"

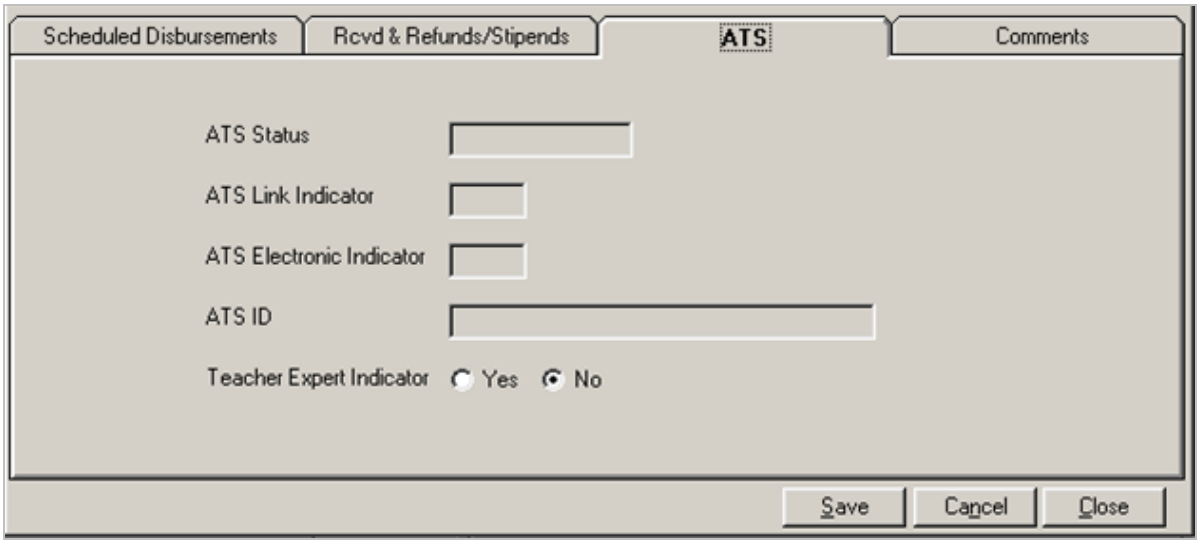
You can edit all fields on this form.

Comments Tab

The Comments tab displays any existing comments. To add comments, click **Comments** and enter your comments. The Comments field holds 1000 characters.

TEACH Grants - ATS Tab

For TEACH Grants, the Agreement To Serve (ATS) tab contains information related to the agreement students electronically sign related to the requirements associated with accepting a TEACH grant,



Field Descriptions - ATS Tab

Field	Description
ATS Status #	The status of the agreement as recorded at COD.
ATS Link Indicator	Confirmation that the agreement has been linked to the award.
ATS Electronic Link Indicator	Indicates the status of the electronic signature associated with this grant.
ATS ID	ID of the Agreement to Serve document.
Teacher Expert Indicator	Indicates if the TEACH grant recipient has the expert knowledge in the field, for example, someone who has retired from a specific field and is now pursuing a master's degree to become a teacher in the same field. The indicator can only be set to Yes if the student is a graduate student.

Click **Add Adjustment** to create a transaction adjusting a disbursement. The transaction will be picked up and sent to COD using export procedures under the Daily menu.

Click **Save** to save changes to the form.

Click **Cancel** to cancel changes to the form.

Click **Close** to close the form. If you have unsaved changes, you are prompted to save changes or close the form without saving.

Pell Grant Form

The Pell Grant program is a type of post-secondary, educational federal grant program sponsored by the U.S. Department of Education. It is named after U.S. Senator Claiborne Pell and originally known as the Basic Educational Opportunity Grant program. Pell Grants, which do not require repayment, are awarded based on a "financial need" formula determined by the U.S. Congress using criteria submitted through the Free Application for Federal Student Aid (FAFSA). Annually, the Federal Pell Grant Program issues revisions to grant amount and disbursement schedules. The grant disbursement schedule is maintained by the Federal government at https://ifap.ed.gov/ifap/

The Pell Grant form is used to set up Pell Grants in CampusNexus Student. Student eligibility for a Pell Grant is calculated (estimated) when the student's FAFSA is completed. When the FAFSA is sent to the Common Origination and Disbursement (COD) system at the Department of Education, COD determines the Pell amount the student can receive.

The student's ISIR must be on file at your institution before a Pell payment can be posted.

Note: When an Award status is set to 'Canceled', the disbursements associated with the award are also set 'Canceled'. Under these conditions:

- Disbursements may not be added or re-expected. If you click **Add**, an error message states *"Cannot add disbursement to a canceled Award"*. If you click **Re-Expect**, an error message states *"Cannot Re-Expect a disbursement while the Award is in 'Canceled' status. Select a new Award Status and try again"*.
- Disbursements may not be calculated or recalculated. If you click **Calculate** or **Recalculate**, an error message states *"Cannot Calculate disbursements while Award is in 'Canceled' status. Select a new Award Status and try again"*.

Approved Pell payments are posted to the student's ledger card and listed on the Received/Refunds tab of this form.CampusNexus Student updates the Pell disbursement records as ready to be sent to COD when Pell disbursements are approved to pay or actually paid. In addition, if Pell refunds are made, CampusNexus Student marks the refund records as ready to be sent as well.

Pell Formula Calculations

CampusNexus Student calculates the Pell Grant Award amounts based on the student's current enrollment using the following formulas:

- Formula 1:
  When the student is enrolled in a Standard Term program version: standard terms of quarters, standard terms of semesters and standard terms of trimesters (FA Academic Calendars 2, 3, and 4). Also, a student that is enrolled in a Non-standard Terms program version (FA Academic Calendar 1) and term association is not configured.
- Formula 3:
  When the student is enrolled in a Non-standard Terms program version (FA Academic Calendar 1) where term association is configured.
- Formula 4:
  When the student is enrolled in a Clock hour Program or a Non-term Credit Hour Program Version (FA Academic Calendars 5 and 6)

If the student has NSLDS history on file indicating that the student received Pell during the award year or if there are existing Pell awards within the system for the award year, these amounts will be taken into account and the award amounts reduced.

Manually Entering the Pell Amount

If you add a new Pell Grant and manually override the amount of Pell from the Pell tables, you become responsible for calculating the correct amounts for Origination Amount and each Scheduled Disbursement. When you are finished entering the Pell data, click **Save**.

If you have entered manually calculated Pell origination and scheduled disbursement amounts, and then you change the enrollment status on a disbursement, click **Save**.

In both cases, **do not** use the **Recalc Pell Eligibility** button. If you click this button, CampusNexus Student recalculates the Pell amounts based on the standards in the Pell tables. CampusNexus Student is likely to change the values you have entered.

Validations

CampusNexus Student includes refund amounts when checking the disbursements against the total amount packaged. When adding scheduled and disbursed amounts (to prevent you from going over the amount packaged), CampusNexus Student must take into account refunds on student loans (other than direct loans) and Pell Grants. Direct Loans are handled through the origination change.

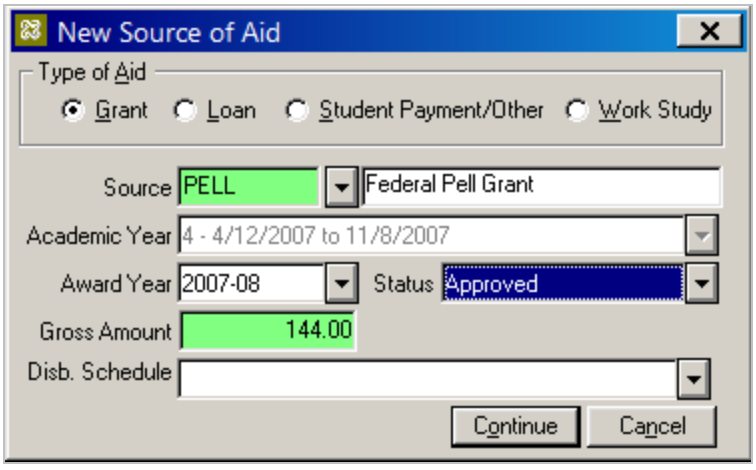
The number of disbursements and percentage disbursed in each disbursement are set up under Lists > Financial Aid > Academic Years.

Configurations that are relevant to Pell / COD grants processing are set up under Setup > Financial Aid > COD Grants.

To work with the Pell Grant form:

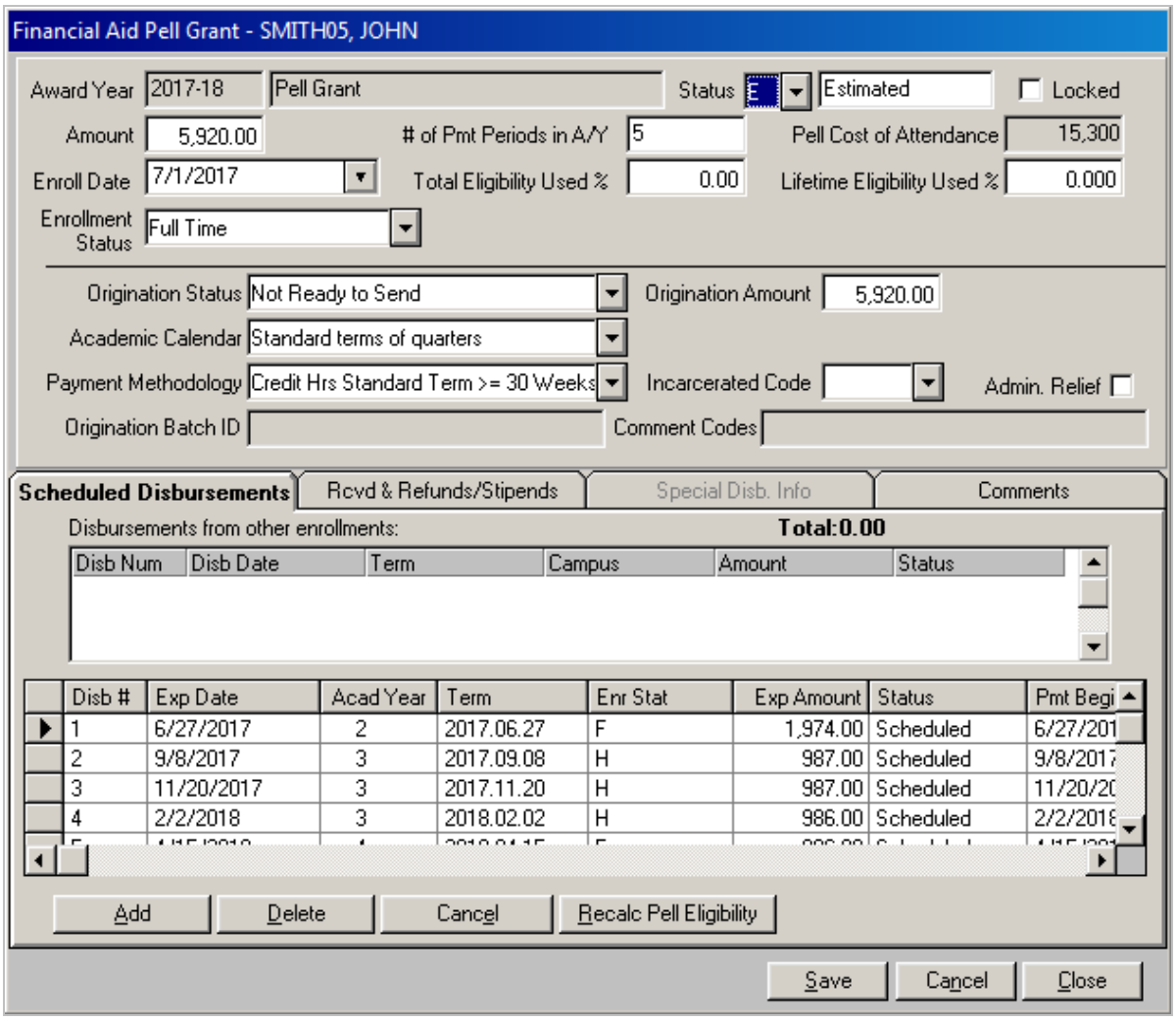
1. Select a student.
2. Navigate to **View** > **Financial Aid** > **Packaging**. The Financial Aid Packaging form is displayed.
3. Double-click the **Academic Year** for which the payment is required or select it and click **Edit**. The Financial Aid Academic Year form is displayed.
4. Click **Package**. The Financial Aid Packaging form is displayed. Any existing fund sources, including Pell Grants, are listed on the grid in the upper left portion of the form.
5. Click **Add**to add a new grant schedule. The New Source of Aid form is displayed.
   - OR -
   Double-click an existing Pell Grant on the Packaging form, or select it and click **Edit**. The Financial Aid Pell Grant form is displayed.
6. If you are adding a new source of aid, select the **Source**, **Award Year**, and **Status**. Enter the **Gross Amount** and click **Continue**.

   If the status is 'Estimated', CampusNexus Student will not calculate a disbursement schedule on the next form.



7. The Financial Aid Pell Grant form contains fields in the top portion of the form and the following tabs:

- Scheduled Disbursements
- Rcvd & Refunds/Stipends
- Special Disb. Info
- Comments



8. Enter or change data on the top portion of the form as required. Refer to the field descriptions.
9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

   CampusNexus Student checks for an ISIR on file before writing the Origination ID. If an ISIR is on file, the Student Pell Transaction ID is populated from the ISIR record. CampusNexus Student retrieves the first 11 characters from this field and populates the Student Pell Origination ID field.

Field Description (top section of the form)

Field	Description
Award Year	Award Year selected on the Financial Aid Academic Year form.
Amount	Amount the student is eligible to receive.

Field	Description
Status	Status of this Pell grant. The status options are: • **A** - Approved • **C** - Canceled • **E** - Estimated • **P** - Pending Approval Canceled status: • When a user cancels a Pell disbursement, CampusNexus Student checks if all other disbursements for the award are in canceled statuses. If so, the status for the Pell award is changed to "Canceled". • If at least one disbursement of a Pell award has a status of "Paid" or "Ready to Pay", the "Cancel" option is not available in the award's status list. The statuses of all disbursements associated with a Pell award are set to "Canceled" if a user cancels the award. • If the Pell origination status is "Ready to Send", the status is changed to "Not Ready to Send" if the award has been canceled. • When a student's school status is changed to a 'never attended' status, the Pell award's status is changed to "Canceled" and the Pell origination status is "Ready to Send", the status is changed to "Not Ready to Send" if all associated disbursements have a canceled status. Once a Pell Grant is approved and batched to send to COD, you cannot make changes that affect the batched data.
Locked	Enables users to lock or unlock a fund source, preventing or allowing changes to that Title IV fund source.
# of Pmt Periods in A/Y	Enter the number of payment periods in the academic year. The default comes from the Academic Year Setup. The maximum is 15. **Note**: Financial Aid award years begin on July 1st and end on June 30th. When Pell or campus-based funds are awarded to a student, CampusNexus Student evaluates all scheduled disbursements for the award. • If any scheduled disbursement is dated after the June 30th deadline, CampusNexus Student prevents the disbursement from being counted as part of the award. • If a disbursement date is after June 30th, students must complete another FAFSA for the following award year and the disbursement will be paid from that award year.
Pell Cost of Attendance	This read-only field displays the student's cost of attendance. It is passed to this form from the Packaging form.
Enroll Date	The enroll date must occur within the Pell Grant Award Year. • If the student's enrollment date is after July 1 of the Pell Grant Award Year, the date from the enrollment record appears in this field. • If the student's enrollment date is before July 1 of the Pell Grant Award Year, this field contains the July 1 date of that year.

Field	Description
Enrollment Status	Student's enrollment status. The valid values are: • 1 - Full Time • 2 - ¾ Time • 3 - ½ Time • 4 - Less than ½ Time • 5 - Other If this field is blank, default the value to 1, 2, 3, or 4 depending on the value of the attendance status in the student's enrollment record. Enrollment statuses can be: • F = Full Time • H = Half Time • L = Less than Half Time • Q = ¾ Time • 0 = Other If the student's enrollment record is set to one of these values, the Pell Enrollment Status is defaulted to the appropriate value (1, 2, 3, or 4). If the student's enrollment record does not reference one of these values, the default is set to Full Time. **Note**: If the Add'l Eligibility Indicator (AEI) check box is selected and you try to change the Enrollment Status, the message *"Enrollment Status cannot be changed for students eligible for additional Pell funds."* is displayed. You must clear the AEI check box before you try to change an enrollment status.
Lifetime Eligibility Used %	Percentage of the eligibility that the student has used. This field is read-only and is updated when the COD record for the Pell Grant is imported from COD. Beginning in the 2010-2011 Award Year, COD returns the Lifetime Eligibility Used % in the Common Record Response and the Negative Disbursement System-Generated response for Pell Awards for First Time Pell Recipients for the 2010-2011 Award Year and forward. This field is sent in multiple Pell Reports from COD, the Multiple Reporting Records, Reconciliation Report, and Year to Date file. Only the Year to Date file updates this field within the database, in the other files it is just used for display. This field is saved to the database and displayed on the form.

Field	Description
Origination Status	Origination status of this Pell Grant. The status options are: • **A** - Accepted • **B** - Batched to Send • **E** - Error/Rejected • **N** - Not Ready to Send or Not Ready to Send (No ISIR) • **R** - Ready to Send • **Blank** - Not on File This field can be edited only if a new Pell Grant is being added or if the value is blank, **N**, **R**, or **E**. When you **add** a Pell Grant, the default status is 'Not Ready to Send' or 'Not Ready to Send (No ISIR)'. The conditions under which the Origination Status may be set to 'Ready to Send' depends on your institution's policies. CampusNexus Student has a default setting that prevents the Origination Status from being set to 'Ready to Send' unless an ISIR has been received and the COD Grant Status is Approved. With this setting the Origination Status cannot be changed to 'Ready to Send' until the ISIR Received Date has been populated by CampusNexus Student (when an ISIR is received). If the **Originate/Certify Estimated Awards** option is enabled and the "Automatically Update Origination Status to Ready to Send?" flag is enabled (Setup > Financial Aid > COD Grants), the Origination Status is converted to an "R" if the Award Status is not equal to "C" (Cancel) when an ISIR is imported or during the ISIR Matching process. When manually updating a Pell award, when the "Originate/Certify Estimated Awards" option is disabled regardless of how the "Automatically Update Origination Status to 'Ready to Send"? flag is set, if the Origination Status is set to 'Ready to Send' and the Pell award Status is updated to 'E' (Estimated) or 'P' (Pending), the message *"Origination Status cannot be 'Ready to Send' until Pell Grant Status is 'Approved'"* is displayed when an attempt is made to save the award. You are prompted to set Origination Status to 'Ready to Send' when you modify the verification status. The verification status field displayed on the Student Packaging form is included in the Pell origination files transmitted for acknowledgment. A change in verification status will cause a prompt to ask if you want to set the Origination status to 'Ready to Send'. The prompt occurs if the following conditions are met: • CampusNexus Student determines the award year selected on the form. If the Origination status is A, this message will appear: *Pell Origination Has Changed. Change the Origination Status to Ready to Send?* • If you respond with Yes, CampusNexus Student sets the Origination status to **R**. Otherwise, no change is made. After you export originations,CampusNexus Student sets the origination status to **B** - Batched to Send. When a Pell Grant origination status is Batched, you are not allowed to modify any origination information. After the Pell Grant origination records are sent to COD, if changes are made to the student's

Field	Description
	data records that affect the Pell origination, CampusNexus Student captures the changes and prepare records to be exported to COD. The Pell Grant record is considered to be originated if the Origination status is **A**, **B**, or **E**. If the Pell record has already been originated (COD) and you change the Weeks Enrolled in AY on the Academic Year form, you are prompted to change the origination status to **R**. **Note**: If the Origination Status is set to 'Accepted' and changes are made to the Add'l Eligibility Indicator (AEI), CampusNexus Student prompts you to set the status to **'Ready to Send'**.
Origination Amount	Saving will only overwrite the origination amount when you change it. If the origination is accepted, changing the origination amount will prompt you to set the status to Ready. This allows two scheduled Pell Grants for the same award year and will be accurately reflected on the related origination record.

Field	Description
Additional Eligibility Indicator (AEI)	**Award Years 2009-2010, 2010-2011, 2017-2018 and beyond**: You can select or clear the Add'l Eligibility Indicator (AEI) check box to indicate if a student is eligible to receive a Year-Round Pell Grant. • When AEI is selected for award years 2017-2018 and beyond, a student is eligible to receive up to 150% of the Full-Time Maximum Pell Grant. • When AEI is selected for award years 2009-2010 and 2010-2011, a student is eligible to receive up to 200% of the Full-Time Maximum Pell Grant. Enabling this option automatically updates the Origination Amount when changes are made to the award Amount if the Origination Status is not in a 'Batched' or 'Accepted' status. **Note:** Only students with an Enrollment Status of at least half-time may qualify. The check box is not visible when Enrollment Status is 'Less than 1/2 Time' or 'Other'. You can clear the AEI check box if the student's Pell Grant award does not exceed 100% of the established Pell award limit (taking into account scheduled, posted, and canceled disbursements, as well as refunds). If the award exceeds 100%, a message indicates that the check box cannot be cleared because the student already has an excess award amount (see sample message below - dollar amount will vary in the message). *Additional eligibility indicator cannot be unchecked. Student already has been, or is being, awarded more than $...* After receiving this message, to clear the AEI check box, you need to create refunds or cancel scheduled disbursements to reduce the award amount to less than or equal to 100% eligibility. **AEI Validation**: • If you try to clear the AEI check box, CampusNexus Student validates if the award is more than 100% of the student's Pell eligibility. • Calculation: Amount disbursed + Amount of Scheduled disbursement - Amount Refunded. • If you try to select the AEI check box, CampusNexus Student validates the Enrollment Status to ensure it is not less than '1/2 Time'. • If the award amount is greater than 150%/200% (based on specific award year) of the student's Pell eligibility and AEI is selected, or if the award amount is greater than 100% of the student's Pell eligibility and AEI is not selected, the award amount is reset to the student's original Pell eligibility amount. **Note**: If a campus has the Servicer Link field configured to 'Global' (Setup > Campus Locations > Add/Edit > Financial Aid), the Pell validations are relaxed and the AEI check box is not displayed on the Pell Grant form. **Award Years 2011-2012 through 2016-2017**: Due to the discontinuation of the "two Pell Grants in one award year" provision instituted in 2011 (Department of Defense and Full-Year Continuing Appropriations Act, 2011), COD does not accept an Additional Eligibility Indicator field value of "True" (or "selected") on Pell origination records for the award years 2011-2012 through 2016-2017.

Field	Description
	Accordingly, CampusNexus Student no longer supports Year-Round Pell (200% Pell award) for Award Years 2011-2012 through 2016-2017, and COD Export files for Pell awards no longer include the <AdditionalEligibilityIndicator> tag.
Use Sec. EFC Code	Secondary Expected Family Contribution. Valid values are: • **Blank** • **O** - Award previously based on secondary EFC • **S** - Award based on Secondary EFC
Incarcerated Code	Select Yes or No. The default is blank (No).
Admin. Relief	If an institution has been granted Administrative Relief, selecting this check box ensures that records for the award year are included in the COD Export process. **Note:** This check box only appears when Financial Aid Automation is enabled.
Academic Calendar	Select the Academic Calendar that applies to this grant. The default is the option set up for your campus. • Non-standard terms • Standard terms of quarters • Standard terms of semesters • Standard terms of trimesters • Clock Hours • Credit Hours without terms
Payment Methodology	Select the Payment Methodology that applies to this grant. The default is the option set up for your campus. • Formula 1 = Credit Hour - Standard terms in which the fall through spring terms are equal to or greater than 30 weeks, or the academic year exceeds the definition of an academic year and the institution has a waiver. • Formula 2 = Credit Hour - Standard terms in which the fall through spring terms are less than 30 weeks without a waiver. • Formula 3 = Credit Hour with Standard or Non-Standard terms. • Formula 4 = Clock Hour or Credit Hour without terms. When the program or the remaining portion of it is less than the full academic year, it is determined by calculating the weeks in the payment period divided by the weeks in the academic year and calculating credits/hours in the payment period divided by the credits/hours in the academic year and using the lesser of the two calculations. Since the number of weeks in the payment periods is created as a whole number and front loaded when the academic year has an odd number of weeks, the academic year weeks total is divided in half to allow for decimals and an even split of weeks is assigned to the weeks calculation for each payment period to meet Formula 4 expectations. • Formula 5 = Nonresident portion of a program offered by correspondence without terms. (Distance Ed.)

Scheduled Disbursements Tab

The Scheduled Disbursements tab lists the Pell Grant disbursements for the selected award year. The disbursements are calculated based on the data entered in the top half of the form. If the status of the Pell Grant is Estimated, CampusNexus Student does not automatically calculate a disbursement schedule. You can initiate the disbursement schedule by clicking **Calculate** or by adding a new scheduled disbursement to the list. The listed disbursements are updated as approvals, are processed, and payments are made.

Scheduled disbursements are created when the status on the New Aid form is selected as Approved or Pending, or when the Add or Calculate buttons are clicked on the Pell Grant form. The Scheduled Disbursement list is not created when new aid is added with a status of Estimated. Individual disbursements with a status of Paid or Cancelled cannot be edited.

When FA disbursements are posted as received on the student's ledger card from the Student Accounts Payments form or from the Post FA Disbursements form, CampusNexus Student updates the Student Academic Year ID column in the FA Disbursements table.

When a student is dropped, financial aid is canceled. If the student is reinstated, financial aid must be re-expected. Scheduled disbursements are not automatically changed back to Scheduled. Review scheduled disbursements for each fund source to re-expect the disbursements that still apply.

Field Descriptions - Scheduled Disbursements

Field	Description
Disbursements from other enrollments	This section lists additional disbursements (from other enrollments) that have the same Pell ID and do not have a status of 'Canceled'. When a student has multiple enrollments, if the Financial Aid is not moved to the new current enrollment, CampusNexus Student allows you to enter multiple Pell awards when the enrollment is transferred up to the eligible amount. You cannot add more than the eligible Pell amount for the award year onto the second enrollment. The top grid displays the current disbursements. The bottom grid displays the disbursements from previous enrollments. The Disb # numbering scheme picks up where the previous disbursements left off.
Total	The total amount of all the listed disbursements.
Disb Num	The maximum number of allowed disbursements based upon the financial aid type.
Disb Date	The date the disbursement was sent to COD.
Term	The term to which the disbursement is related.
Campus	The campus where the student is enrolled for the selected program version.
Amount	The amount that the student is eligible to receive.
Status	The status of the grant disbursement. The statuses include Scheduled, Ready to Pay, Paid, and Canceled.
Disb #	The Disb # numbering scheme picks up where the previous disbursements left off.
Exp Date	The date on which the grant disbursement is due to be paid.

Field	Description
Acad Year	The academic year number to which the disbursement applies. You can edit the academic year for each disbursement if the disbursement passes the criteria required for editing. If you edit this field, a drop-down list is displayed. Each row in the drop-down list shows the academic year number, start date, and end date. When new scheduled disbursements are added for the Pell Grant, CampusNexus Student by default sets the academic year for each disbursement to the academic year being packaged.
Term	Type the term code or select it from the list. This is the term to which the disbursement is related. When you click in the field on the grid, a drop-down button becomes available. Click the button to see a list of terms from which you can select. The Term code can be edited only for disbursements that have a status of Scheduled (**S**).
Enr Stat/Hours	If the ProgramVersion.ClockCredit value is CCredit Hours, the column heading is Enr Stat. The value of this column is displayed from and stored to FaSched.EnrollmentStatus. This is a required field for Credit Hour institutions. The program stores zero to ClockHours and does not display the ClockHours column. The Enr Stat column is a combo box from which you can select the following: • F = Full Time (default) • Q = Three Quarter Time • H = Half Time • L = Less Than Half Time • O = Other If the ProgramVersion.ClockCredit value is HClock Hours, the column heading is Hours. The value of this column is displayed from and stored to FaSched.ClockHours. This is a required field for Clock Hour institutions. The program stores F to Enrollment Status and does not display the enrollment status column. Total Clock Hours for all disbursements must add up to the Clock hours for the Academic Year (FaStudentAY). When you click **Recalc Pell Eligibility**, CampusNexus Student uses the new FaPell.CalculateFullPellGrant method to find the full Pell amount for the students EFC and COA; then, it calculates each disbursement based on Eligibility for the selected Enrollment Status / # of Disb. If Disbursement Enrollment Status = O, the amount is always $0. For Clock Hour programs CampusNexus Student uses the method FaPell.ProRatePell to get the Pell Amount, then splits the Pell Amount out into the disbursements using the ClockHours for each disbursement to determine the amount.

Field	Description
Exp Amount	This is the Expected Amount of the disbursement. It is calculated by dividing the total amount of the grant by the number of payment periods in the academic year. When disbursement amounts cannot be divided evenly, the first payment is the highest, for example: • A $2,000 award is disbursed as 667, 667 and 666. • A $1,000 award is disbursed as $334, 333 and 333. The AUTO-PACKAGE routine uses the same calculation method.
Status	The status of the Grant disbursement. The statuses include Scheduled, Ready to Pay, Paid, and Canceled.
Act Disb Date	The Automated COD Export Process enables you to configure if the COD Export Process should exclude Holidays and/or Weekends when determining the Actual Disbursement Date (calculation) that is reported to COD for the day disbursements are to be paid. **When Automated Processes is activated,** you can view the calculated date in the Act Disb Date column on the Financial Aid Pell Grant screen. If neither option is selected, NA appears in this column.
Pmt Per #	Payment Period Number. This column is only applicable if the student's campus is required to do Special Disbursement reporting. If Special Disbursement reporting is required, this column can be edited. If not, there will be no values in this column and it will not be edited. The valid values for this column are from 1 up to the number of payment periods in the academic year.

- Click **Add** to add a new disbursement to the schedule. Select the date and term, then click Calculate to get the new distribution of the total grant amount.
- Click **Delete** to remove a disbursement record from the list permanently. Consider using the Cancel button to keep a record of the action on file.
- Click **Cancel** to cancel a disbursement. The disbursement continues to be displayed on the grid but is marked as Cancelled. It is not available to pay to the student.

  When you select a different row, the button label is updated. If the selected disbursement was canceled, the button label is **Re-Expect**. Otherwise, it is **Cancel**.
- Click **Recalc Pell Eligibility** to re-evaluate the Pell Grant based on the standard Pell table values for the student's academic year and enrollment status. **Do not use this feature (button) if you are manually calculating and entering the Origination Amount and Scheduled Disbursement Expected Amounts.**

Pell Grant Eligibility Recalculation by Clock Hours

Navigate to **View > Financial Aid > Packaging > Edit Academic Year > Package**(button) > Pell Fund Source > **Recalc Pell Eligibility** (button).

Institutions that use generic Crystal Reports by Award Year using the Award Letter option can pro-rate Pell disbursements for clock hour programs. The calculation is performed as follows:

1. Select the Pell award based on the students Estimated Family Contribution (EFC) for a full-time student.
2. Multiply this amount by the product of (Weeks enrolled in AY / Weeks in programs definition of AY) to get the students maximum possible Pell award.
3. Pro-rate each disbursement as follows:

- Max Pell Award X (# Disbursement Hours / # AY Hours) = Disbursement Amount
- Maximum Pell award determined in step (2) above (X) multiplied by the product of (Number of Hours for the Disbursement / Number of hours in the programs definition of an AY) = the amount for this disbursement.

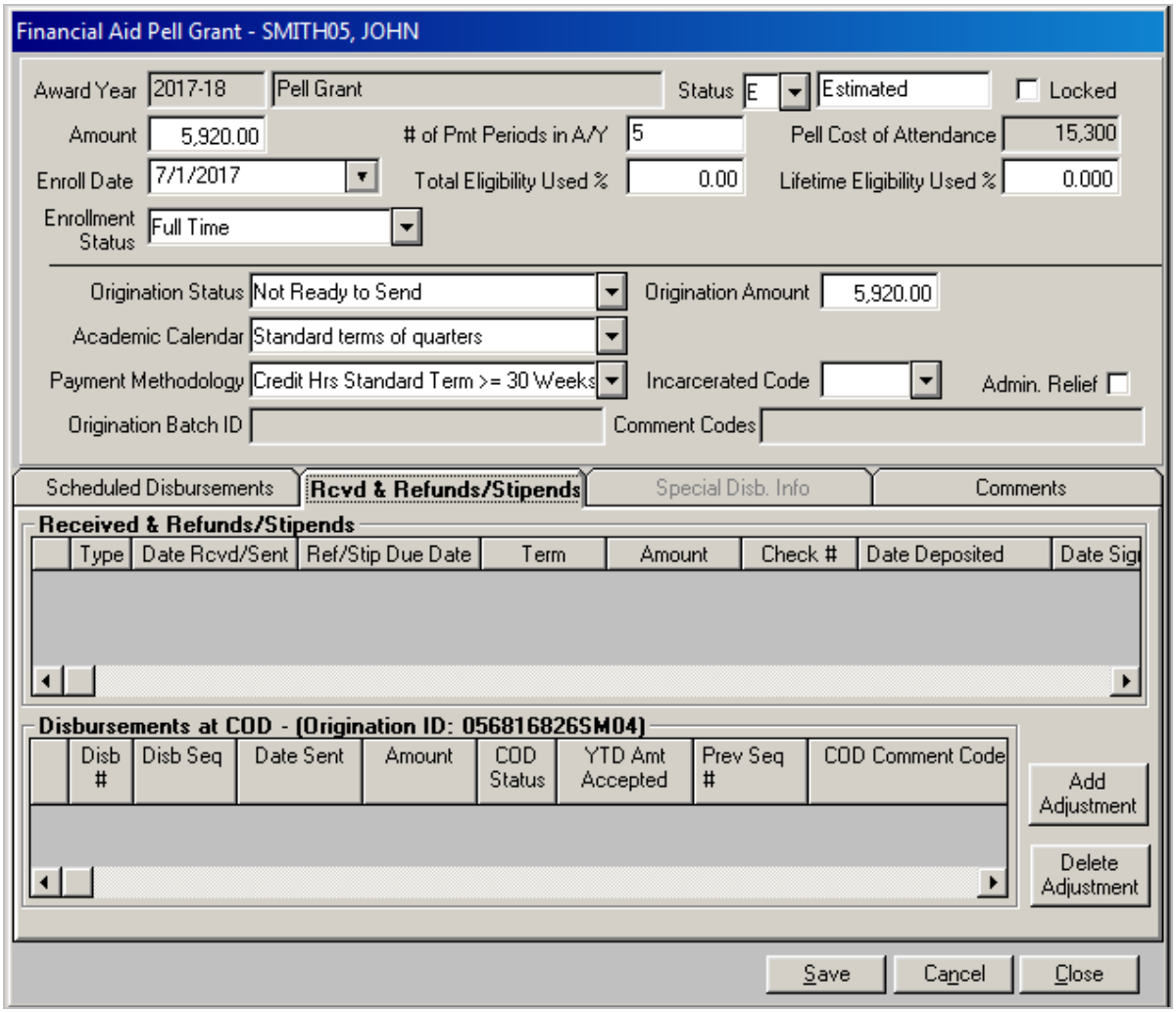
4. The sum of all scheduled disbursements equals the Amount Packaged.

   CampusNexus Student validates the number of hours associated with the disbursements . The validation is based on the total according to the hours expected to complete in the students academic year definition.

Rcvd & Refunds/Stipends Tab

The Rcvd & Refunds/Stipends tab lists the receipts of Pell Grant disbursements from COD for the student. It also lists any Pell refund transactions that have been processed for this student and any stipends paid to the student from Pell Grant funds. The grid displays information from transactions that have been processed in the Student Accounts department. No changes to this grid can be made on this form. The table following the illustration of the form describes the fields and buttons.

The bottom portion of the Received & Refunds/Stipends section displays traffic related to this student between your institution and the COD. Stipends are not part of the school/COD traffic. The records under **Received & Refunds/Stipends** should agree with the records under **Disbursements at COD**. If they do not agree, you can add an adjustment transaction to balance the two sets of records. Any adjustment record you add is picked up by CampusNexus Student and written to a file for transmission to COD. Exporting and importing of records related to Pell Grants is handled under Daily operations. Those procedures are described in other Help system topics.

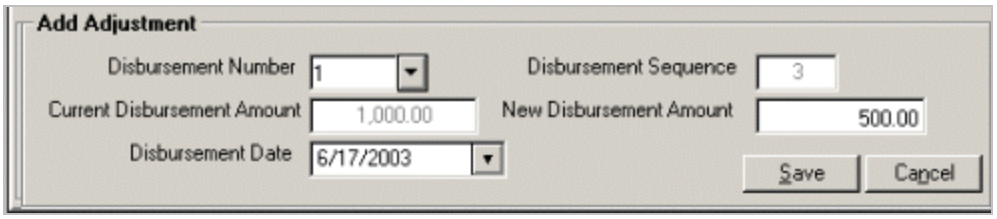


Field Descriptions - Rcvd & Refunds/Stipends

Field	Description
Received/Refunds List	
Type	Type of entry on the list. • **D** - Disbursement Received • **R** - Refund • **S** - Stipend
Date Rcvd/Sent	Date that the disbursement was received, the refund was sent, or the stipend was paid.
Ref/Stip Due Date	Date that the refund is due to be sent to COD for the date the stipend is scheduled to be paid to the student.
Term	Term to which the transaction is related.
Amount	Amount of the transaction.
Check #	Check number or EFT number of the transaction.
Date Deposited	Date that a receipt was deposited in the bank.
Date Signed	Date on which the student signed for the disbursement received.
Batch ID	ID of the batch in which the transaction was processed.
Status	Status of the transaction: Approved, Paid, Sent, etc.
Disbursements at COD	
Disb #	Disbursement number for this row.
Disb Sequence	Order in which disbursements are to be made.
Ref #	Number of the disbursement.
Date Sent	Date on which the transaction was sent to COD.
Amount	Amount of the transaction that was sent to COD
COD Status	Status of the transaction at COD. Statuses include Corrected, Rejected, Verification, Batched.
YTD Amt Accepted	Total year-to-date Pell amount accepted by COD.
Export Batch ID	Number of the batch in which the transaction was exported to COD.
Previous Seq #	Record number for the previous transaction associated with the disbursement, as provided by COD.
COD Comment Codes	List of all COD edit (comment) codes associated with the Export Batch.

- Click **Add Adjustment** to create a transaction adjusting a disbursement. The transaction will be picked up and sent to COD using export procedures under the Daily menu.
- Click **Delete Adjustment** to remove an adjustment transaction from the table before it is sent to COD.

The Add Adjustment form is used to enter adjustment data.



The Disb. Reference Number is the number of the disbursement to which the adjustment applies. The Total Accepted Disb. Amount field shows the disbursement amount accepted by COD. Enter the **Adjustment Date**and **Adjustment Amount**and click **Save**. Once saved, procedures under the Daily menu are used to export the adjustment to COD.

CampusNexus Student permits disbursement adjustments only if the origination status is **A** - accepted, **B** - batched, or **C** - corrected (Accepted) and the disbursement has been released to COD.

Special Disb. Info Tab

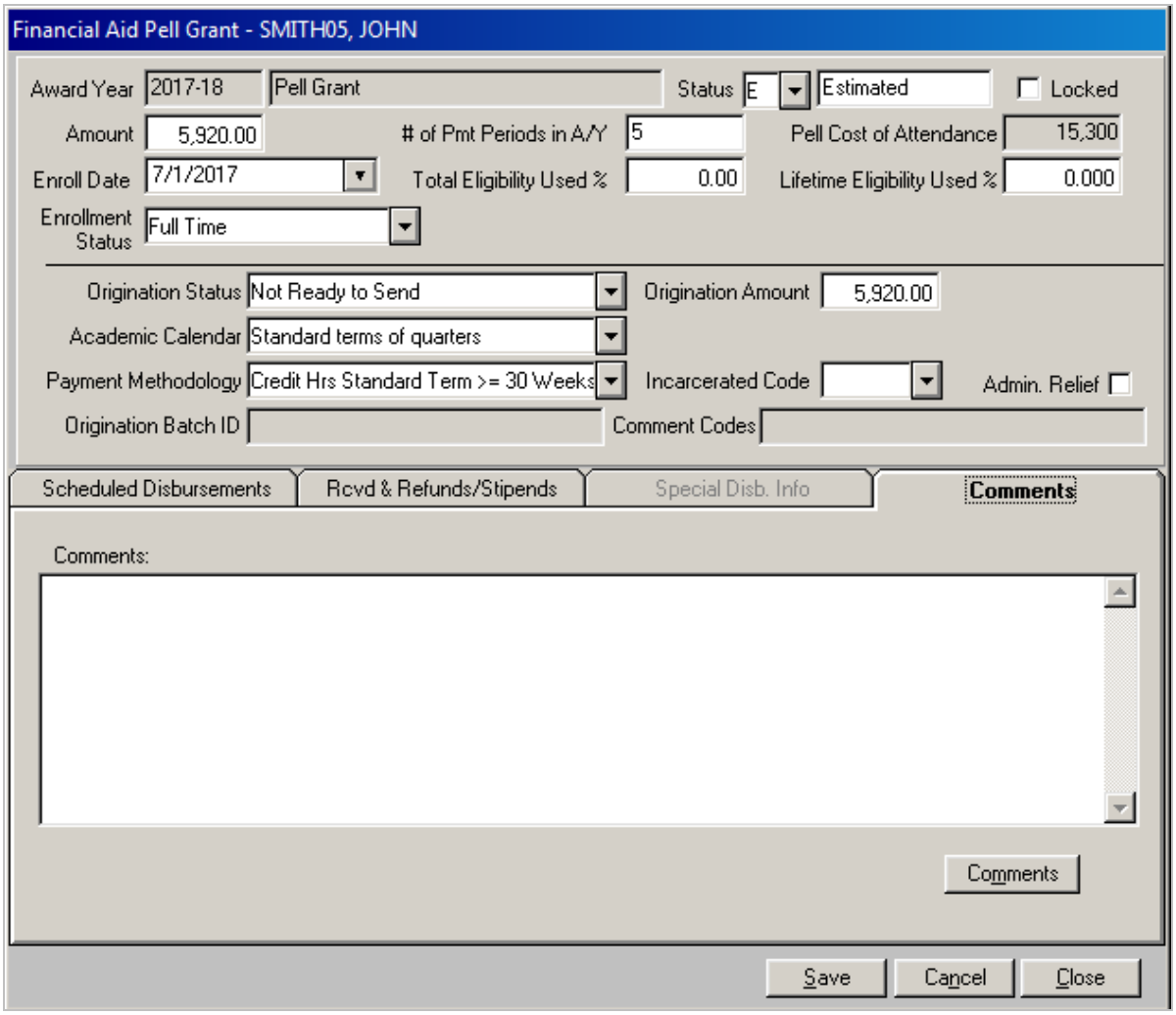
The Special Disb. Info tab is disabled if the award year for the Pell is 2001-02 or later. It is shown for earlier award years.

If your institution is required to report on special disbursements, it will be noted on this form by a 'Yes' next to the "Enter Special Disb Info?" question.

You can edit all fields on this form.

Comments Tab

Click **Comments** to view or add comments. The Comments field holds 1000 characters.


Financial Aid Pell Grant - SMITH05, JOHN
Award Year
2017-18
Pell Grant
Status
E
Estimated
Locked
Amount
5,920.00
# of Pmt Periods in A/Y
5
Pell Cost of Attendance
15,300
Enroll Date
7/1/2017
Total Eligibility Used %
0.00
Lifetime Eligibility Used %
0.000
Enrollment Status
Full Time
Origination Status
Not Ready to Send
Origination Amount
5,920.00
Academic Calendar
Standard terms of quarters
Payment Methodology
Credit Hrs Standard Term >= 30 Weeks
Incarcerated Code
Admin. Relief
Origination Batch ID
Comment Codes
Scheduled Disbursements
Rcvd & Refunds/Stipends
Special Disb. Info
Comments
Comments:
Comments
Save
Cancel
Close

Packaging for Work Study and FWS Payments

You can package a student for work study and post Federal Work Study (FWS) payments to a student's financial aid record. Alternatively, you can use the batch method to post one or more work study payments.

A work study award behaves differently from other packaged FA in that work study disbursements are never posted to the student's ledger card. The disbursements (payments) are made directly to the student. Disbursements are never "scheduled" for work study. The student is paid as work is performed.

You can also use the Daily > Financial Aid > Post Work Study Disbursements menu option to post groups of work study disbursements by campus, fund source, and period ending date.

A report under Reports > Financial Aid > FA Batch Posting Work Study lists all work study payments made and offers criteria to filter on the date of disbursement.

Integrated Accounting

Integration with CampusNexus Finance, HR & Payroll

If CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll, users can view work study awards in CampusNexus Finance, HR & Payroll. The following properties are displayed in the Award sections of a Student or Employee record and in the HR/Payroll record:

- FWS Award Year (including Start and End Date of Award Year)
- Fund Source
- Gross Award Amount
- Amount Disbursed
- Award Balance
- Status

Work study award management and packaging is done only in CampusNexus Student. Hence the records are read-only in CampusNexus Finance, HR & Payroll. When work study awards are packaged in CampusNexus Student, the information is propagated to CampusNexus Finance, HR & Payroll.

Note: When an award is reassigned, the new Academic Year Start Date and End Date are updated against every transaction in CampusNexus Finance, HR & Payroll. Since this is non-financial data, the updates will occur even for posted transactions.

To activate the Work Study Integration option for CampusNexus Finance, HR & Payroll, select the Work Study Integration option on the General tab of the Financial Aid - Settings form.

When the payroll has been processed for a student in CampusNexus Finance, HR & Payroll, the following information is sent to CampusNexus Student:

- Date on which the employee was paid
- Payment Period End Date
- Hours worked by the employee
- Check #
- Gross Amount Paid

If a payment that was already sent to CampusNexus Student is voided, CampusNexus Finance, HR & Payroll sends an update to CampusNexus Student so that the Check# fields in CampusNexus Student indicate the void status. Voiding a check will update the check number as Null. A payment line is inserted in CampusNexus Student when earnings are generated in CampusNexus Finance, HR & Payroll. This is done without check number. Once the Payment is posted in CampusNexus Finance, HR & Payroll, the check number is updated against the payment record in SIS. If a new check is cut to replace the lost check, the new check information is sent to CampusNexus Student.

- On the Packaging (Awards) form (View > Financial Aid >Awards), the Amount Received field is continually updated as payments are made to the student in CampusNexus Finance, HR & Payroll. The Amount Received field is also updated if a check is voided in CampusNexus Finance, HR & Payroll. CampusNexus Student does not allow modifications to the payments that have been received from CampusNexus Finance, HR & Payroll. The

Academic Year is populated based on the Academic Year to which the current award is associated. A visual indicator is provided to indicate that a given FWS Award has been imported into the HR module of CampusNexus Finance, HR & Payroll.

- On the Work Study Payments form (View > Financial Aid >Awards, select a work study award) the payment field reflects the information received from CampusNexus Finance, HR & Payroll. The payment information cannot be modified in CampusNexus Student. The Add Payment and Delete Payment buttons are disabled.
- The batch post option for work study disbursements (Daily > Financial Aid > Post Work Study Disbursements) is disabled when CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll.

Amount Disbursed (Past) Field in CampusNexus Finance, HR & Payroll

When Federal Work Study (FWS) awards were awarded prior to CampusNexus Finance, HR & Payroll going live, the opening balances of FWS awards may not correctly reflect awards that were previously paid out. In these cases, an administrator can specify the Amount Disbursed (Past) amount on the Award form in CampusNexus Finance, HR & Payroll. The previously disbursed award will be subtracted: Gross Amount - Amount Disbursed - Amount Disbursed (Past). The Amount Disbursed (Past) field will be imported during the data import. The Amount Disbursed (Past) field is read-only for non-administrator users.

Integration with CampusVue Finance, HR & Payroll

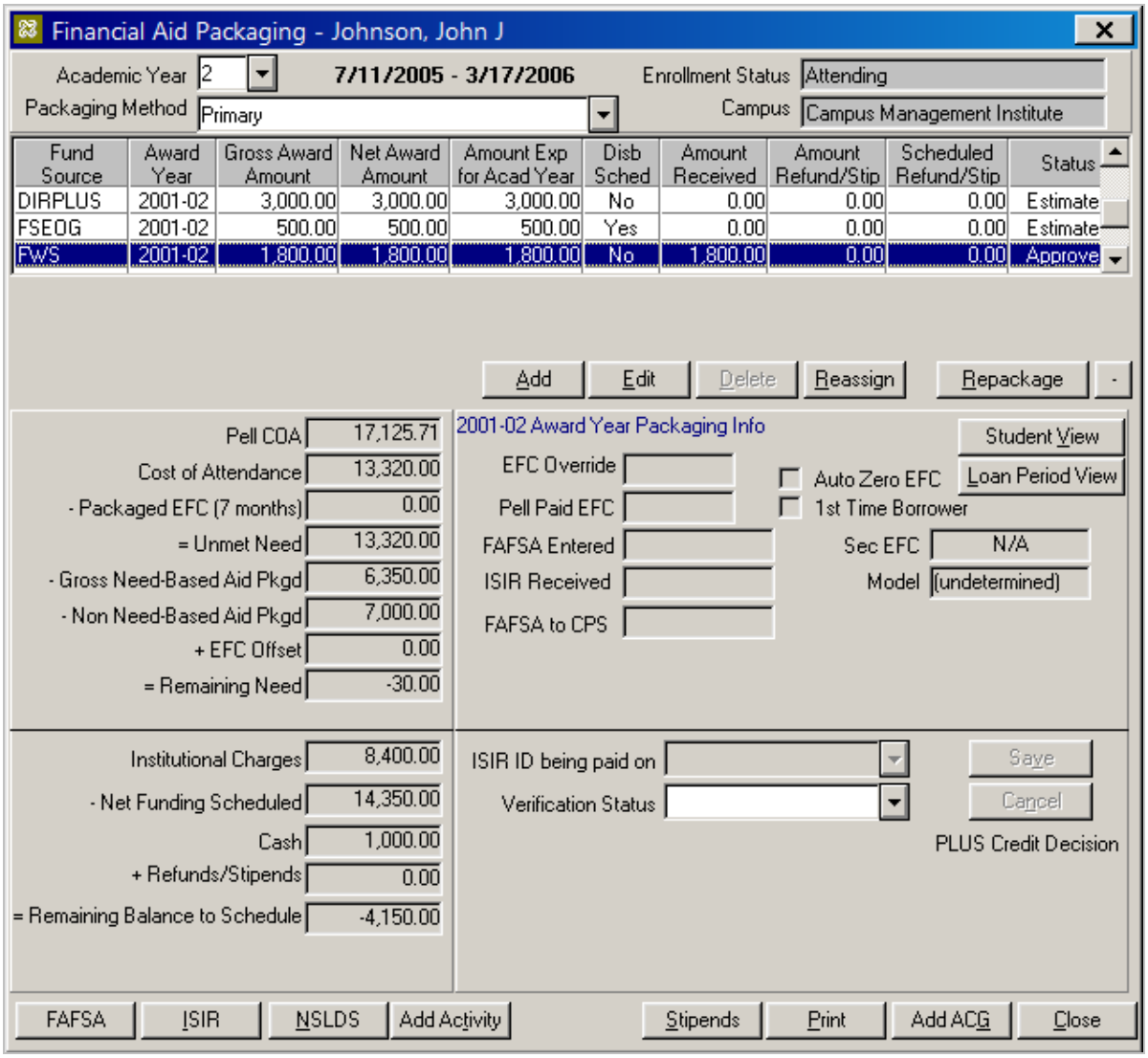
If CampusNexus Student is integrated with CampusVue Finance, HR & Payroll, refer to CampusVue Finance, HR & Payroll Work Study Integration for additional information.

To package a student for work study aid or record a work study payment:

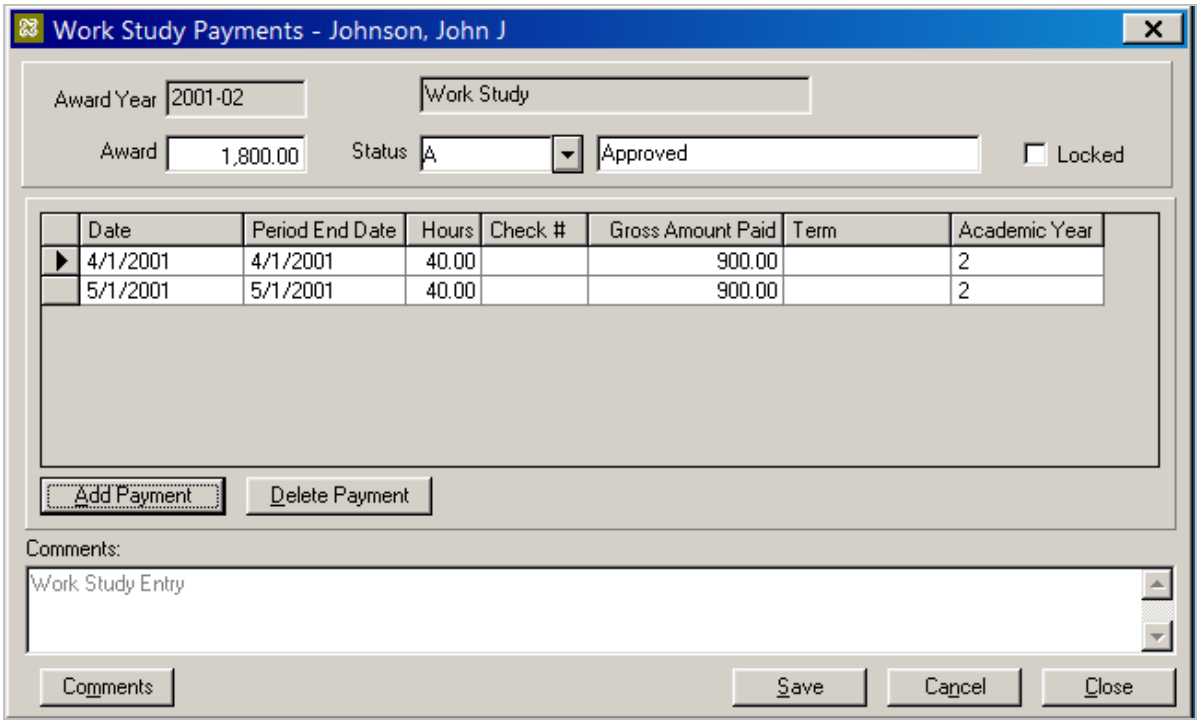
1. Select a student.
2. Navigate to **View** > **Financial Aid** > **Packaging.** The Financial Aid Packaging form is displayed.
3. Select the appropriate **Enrollment** and **Academic Year**, then click **Edit.** The student's Financial Aid Academic Year form is displayed.
4. Click **Package**. The Financial Aid Packaging form is displayed.
5. Select a **Packaging Method**.
6. Click **Add** to add a new source to the FA package. The New Source of Aid form is displayed.
    a. Select the Fund **Source** for work study. The fund source drop-down list displays all fund sources where the Fund Source Type is "WORKST".
    b. Select the **Academic Year**, **Award Year**, and **Status**.
    c. Enter the **Gross Amount** of the work study aid.
    d. Click **Continue**. The Work Study Payments form is displayed.

    - OR -

a. Select a **FWS fund source** in the grid on the Packaging (Awards) form.



b. Click **Edit**. The Work Study Payments form is displayed.



7. If necessary, change the **Amount** and **Status** of the work study award.

   - A - Approved
   - C - Cancelled
     Note: You can cancel Federal Work Study awards if Federal Work Study funds have not been disbursed; however, if FWS has been paid, the "Cancelled" status will not be listed among the available award statuses.
   - E - Estimated
   - P - Pending

   Note: CampusNexus Student does not allow modifications to the payments that have been received from CampusNexus Finance, HR & Payroll.

8. Click **Add Payment** to add a new payment record.

   Note: The button is disabled if Work Study Integration is selected on the General tab of the Financial Aid - Settings form.

9. Accept or enter the **Date** and **Period End Date**.

10. Enter the **Hours**, **Check Number**, and **Gross Amount Paid**.

11. Select the **Term** and **Academic Year**. You can enter the term code or select it from the drop-down list.

12. Click **Comments** to add or edit comments about this work study record. The cursor is placed in the Comments window. The comments field holds 1000 characters of information.

13. Click **Save**. Be sure to save each payment entry before starting the next one.

    Note: If you attempt to add a disbursement that exceeds the total amount of the award, a message is displayed and you cannot saved the transaction.

14. Click **Delete Payment** to remove it from the list.

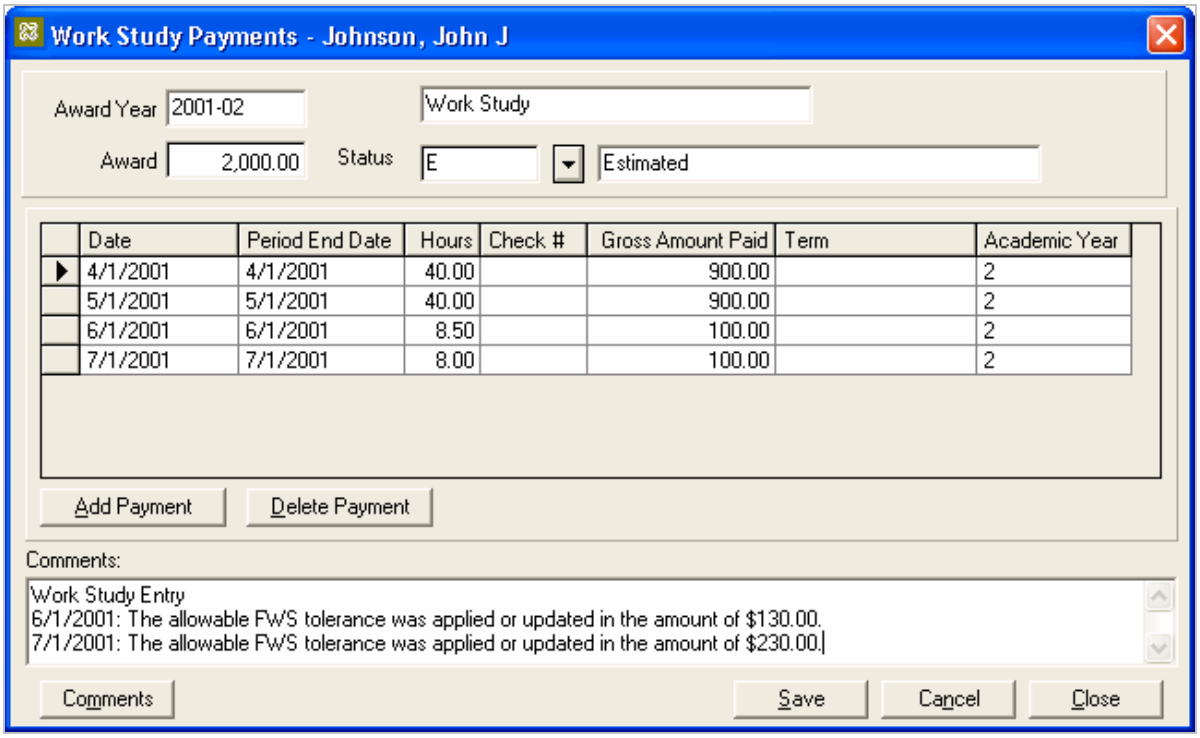
Note: The button is disabled if Work Study Integration is selected on the General tab of the Financial Aid - Settings form.

15. Click **Close** to close the form.

To record a work study payment that exceeds the Cost of Attendance:

There may be instances where additional FWS payments are needed when a student worked more hours than anticipated. When Limit Awards to COA is selected (see Setup > Campus Locations > Campus > Financial Aid tab), you are can record FWS payments that exceed the COA. The total of these additional payments is limited to $300.00.

1. Adjust the **Award** amount to accommodate the additional payments.
2. Select **Add Payment** and enter the payment information.
3. Click **Save**. The notation of the additional payment is automatically included in the **Comments** box.



4. If the added payment would cause the total amount of payments to exceed the $300.00 tolerance limit, CampusNexus Student displays a warning message. The amount must be adjusted to fall within the limit.

Scholarship Processing

This is an outline of the procedure to set up a scholarship for a student. Some preliminary conditions must be in place. As with virtually all student financial aid, a FAFSA must be prepared for the academic year in which the scholarship is to be set up. After the FAFSA is on file, you can continue with the process described below.

To set up a scholarship:

1. Set up the Fund Source.

   Navigate to **Lists > Financial Aid >** Fund Source. Select the Fund Source Type "Scholarship".

2. Set up the Academic Year.

   Navigate to **Lists > Financial Aid >>** Programs.

   - Choose program and program version. Values for academic calendar, credits, and weeks are populated by CampusNexus Student.
   - Click **Add**.
   - Select a **Default Budget**
   - Click **New**.
   - Select **Other Grant**.
   - Select the Number of **Disbursements**.
   - Click **Save**.

3. Select the Student Master of the student to whom you wish to give the scholarship.

   Select **View > Financial Aid >** Packaging.

   - Select the **Enrollment**.
   - Click **Add**.
   - Select the **Academic Year**. (If the Academic Year is not displayed, a FAFSA must be added for the student).
   - Click **Package**.
   - Click **Add**.
   - In the new Source of Aid form, select the **Type of Aid**.
   - Select the Fund **Source**.
   - Enter the **Gross Amount**.
   - Choose a **Status**: A = Approved; E = Estimated; P = Pending.
   - In the Scheduled section, click **Add**.
   - Select or enter the **Exp Date** date in this format: MM/DD/YYYY.
   - Specify the **Exp Amount**. Specify one lump sum distribution or add several smaller amounts that add up to the gross amount.
   - Click **Save** and **Close**.
   - Close all windows.

4. Approve disbursements.

   Navigate to **Daily > Financial Aid > Approve Disbursements to Pay**.

   - Choose **Select a Batch In Progress**.
   - Select the **Award Year**, **Fund Source**, and **Disbursement Dates**.
   - Click **Continue**.
   - Select the **Approve** check boxes next to the amounts.
   - Click **Post Batch**.

5. Post disbursements.

Navigate to **Daily > Student Accounts >** Post FA Disbursements.

- Enter Check #, EFT (if applicable), and term.

6. Verify posting.

   To verify that the amount has been posted, go to the ledger card of the student.

Direct Loan Form

When you package financial aid for a student, you may find it necessary to package a direct loan. CampusNexus Student captures the necessary information for initializing a direct loan and maintaining a history of the loan. Direct Subsidized loans (DIRSUB), Direct Unsubsidized loans (DIRUNSUB), and Direct PLUS loans (DIRPLUS) are recorded. See also Other Loan form and COD grants form for originations and disbursements for other types of loans.

Note: Estimated awards may differ from actual awards on the values in the Net Amount, Bank Fees, and Rebate Amounts fields. For estimated awards, the values for Net Amount, Bank Fees, and Rebate Amounts are calculated from the Gross Amount of the award. The actual award will have disbursements, with the values for Net Amount, Bank Fees, and Rebate Amount calculated from the Gross Amount of the "disbursements" and summed up for the total. Therefore, there may be a variation between the values displayed for the estimated award and the actual award, once the student is enrolled.

The Direct Loan form displays some basic information in the top portion and has tabbed pages for scheduled disbursements, receipts, and refunds, borrower/student information, and promissory note information.

For additional information, see Disbursement Adjustments, Origination Changes, Print Disclosure Statement, Validations for Direct Loans.

Note:

When an Award Status is set to Canceled, the disbursements associated with the award are also set to Canceled. Under these conditions the following applies:

- The disbursements may not be added or re-expected. If the **Add Disbursement** button is clicked, the following message is displayed: *Cannot add disbursement to a canceled Award*. In addition, if the **Re-Expect** button is clicked, the following message is displayed: *Cannot Re-Expect a disbursement while the Award is in 'Canceled' status. Select a new Award Status and try again*.
- You may not Calculate or Recalculate canceled disbursements. If the **Calculate** or **Recalculate** buttons are clicked, an error message is displayed stating: *Cannot Calculate disbursements while Award is in 'Canceled' status. Select a new Award Status and try again*.

Note:

The student's ISIR must be on file at your institution before a direct loan can be originated. See ISIR Requirements below. If a student does not have an ISIR on file and has an undetermined dependency status/model, you need to assign the student with a Dependent status/model when packaging a FFEL or Direct parent PLUS loan.

- If you do not assign the student the Dependent status, CampusNexus Student relies on the existing validations and you cannot package the parent Plus loan. Additionally, the student's dependency/ model remains as undetermined.
- If you assign the student the Dependent status, CampusNexus Student updates the student's record and the new dependency status/model is visible on the student record, allowing you to proceed as normal and package the parent PLUS or DIRPLUS award.

The number of disbursements and percentage disbursed in each disbursement are set up within the Academic Years form.

The *Department of Education* must be set up as a Lender before Direct Loans can be set up for students.

Loan Origination Fees and *Interest rates* for direct loans (subsidized, unsubsidized, and PLUS loans) are set up.

To work with the Direct Loan form:

1. Access the Packaging form. The Financial Aid Packaging list is displayed containing a list of enrollments and their associated academic year.
2. Select an **Enrollment**.
3. Click **Add** to add a new academic year.

4. To view or modify the academic year, double-click the Academic Year for which the loan is required, and click **Edit**.

   The Financial Aid Academic years form is displayed. In this form, values in the Start Date, End Date, or Dependency Status fields are displayed in red, which indicates that there is a pending origination change for a loan associated with the academic year being displayed.

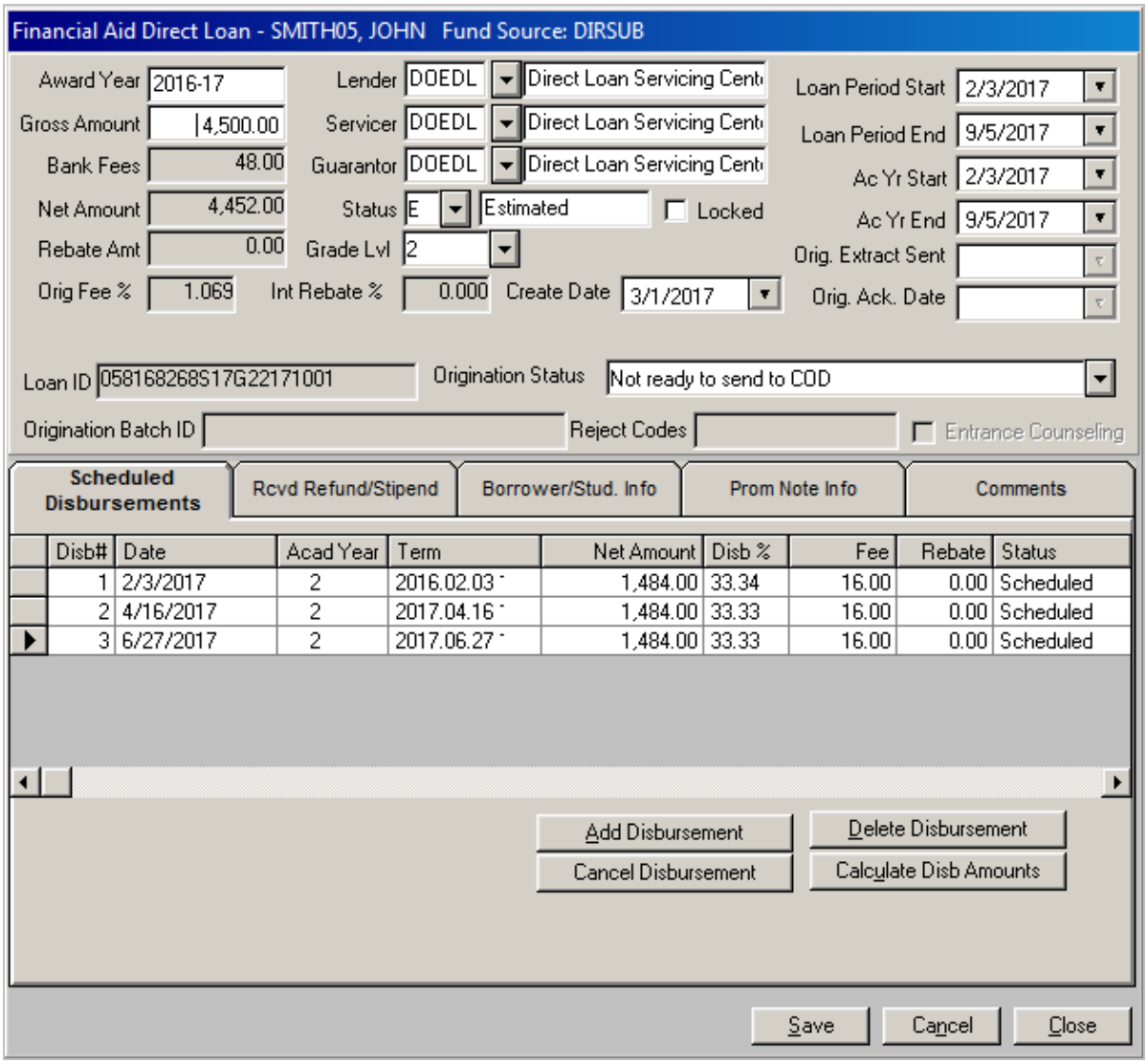
5. Click **Package**. The Standard Student's Package RBS grid or the Alternate Student's Package RBS grid is displayed. Any existing fund sources including direct loans are listed in the upper left portion of the form.

   Note: When the student is enrolled in a Standard Term program version and term association is configured, the **Terms to Include in Direct Loan Packaging** option is displayed on the awards form. Click to display the dynamic list of terms within the Academic Year. The selected terms are used to build the loan period dates and for auto packaging or batch packaging. Based on the terms selected, the corresponding disbursement amount is calculated.

   Example: For a trimester program, if only the Fall and Winter terms are selected, the student will get packaged a third of the student's award eligibility for each disbursement (if it is not the last academic year for the student).

6. To add a new direct loan, click **Add**. Follow the New Source of Aid instructions for Direct Loans.

7. To modify an existing direct loan, select it from the list and click **Edit**. The Financial Aid Direct Loan form is displayed. The Award Year field is read-only.



8. Enter the **Gross Amount** of the loan. The Bank Fees are calculated based on the rates that were configured for the bank and are displayed in a read-only mode. This is the calculated Net Amount of the loan.

    - If a loan is added, the Rebate Amt is calculated by using the following formula:

      Rebate Amt = Gross Loan Amount * ((Orig Fee % - Interest Rebate %)/100.00)

    - If a loan is edited, the Rebate Amt field displays the data stored in the FaStudentAid.InterestRebateAmt field in the database.

      When the disbursements are calculated or edited, this field is calculated and re-displayed. The field is calculated by summing the interest rebate amount calculated for each disbursement.

      CampusNexus Student fills the Loan ID field.

      For *Direct Loans*, the *Lender, Servicer, and Guarantor* is the Department of Education.

      The default values are configured in the Fund Source Code Setup form.

9. Select one of the following **Award Status** options:

- E = Estimated
- A = Approved
- P = Pending Approval
- C = Canceled

10. Select the Grade Level of the student within the award year of the loan. The Grade Level Codes for Direct Loans are as follows:

Description	Code
1st year undergraduate/never attended coll	0
1st year undergraduate/attended college be	1
2nd year undergraduate/sophomore	2
3rd year undergraduate/junior	3
4th year undergraduate/senior	4
5th year/other undergraduate	5
1st year Graduate/professional	6
Continuing graduate/professional and beyor	7

The business rules for this field are as follows:

If adding a loan or (editing a loan and a row does not exist in FaLoan table, or FaLoan.StudentYearInCollege field is blank), the value of the Grade Level field defaults to what is specified in FaStudentAY table. (It only defaults if the grade level corresponds to a valid code listed in the Direct Loan Technical Reference.) For example, if the Grade Level is 0 thru 7, the Grade Level field on the Packaging form is defaulted to this value, otherwise it is left blank.

Note: This field cannot be edited if the origination status is A, B, or X.

11. Select a **Loan Period Sequence** if available.

- If a Loan Period Sequence is selected or populated, the start and end dates of the loan period become the values displayed in the Loan Period Start and Loan Period End fields. The Loan Period Start and Loan Period End become disabled, restricting you from manually changing the value unless you manually change the value of the Loan Period selected. Otherwise, the fields operate as they usually do by allowing you to edit the values in the fields.
- The loan period is not audited since the existing Loan Period Start and End dates are not audited.
- If the Loan Period Sequence is available and the loan periods are populated, the Loan Period Payment column is displayed in the disbursement grid below. The value in the disbursement grid indicates the loan payment periods found for the selected loan period sequence.
- If no loan periods are populated, the Loan Pay. Per. column is not visible. The column is also disabled for academic calendars 2, 3, and 4. In other words, if the academic calendar is not 5 or 6, the Loan Period Seq. field and the Loan Payment Period column in the disbursement grid are hidden.
- If the academic calendar is 5 or 6 and no value is selected in the Loan Period Seq. drop-down list, the Loan Pay. Per. column in the disbursement grid is hidden. If the academic calendar is 5 or 6 and a value is selected in the Loan Period Seq. drop-down list, the Loan Pay. Per. column in the disbursement grid is displayed.
- The Loan Payment Period column stores the value of the loan payment period ID and displays the sequence of the loan payment period in the grid. When the record is initially loaded it must display the value that is stored on the loan payment period ID. Otherwise, you must select the loan payment period sequence.
- When the Loan Payment Period sequence changes, the date on the scheduled disbursement to the Start Date of the Loan Payment Period Sequence is automatically updated. The academic year defaults to the

appropriate academic year based on the start date of the loan payment period. If you change the date of the disbursement, CampusNexus Student automatically updates the loan payment period to the correct sequence number based on which loan payment period the disbursement date falls into.

Note: The Scheduled Disbursement date can be changed to a date outside both the Loan Period and Academic Year dates for non-term Academic Calendars.

- When the Loan Payment Period expands, the Loan Period, Loan Payment Period Sequence #, Start Date, End Date, Credit/Hours, and Weeks fields are displayed. The Loan Payment Period on the disbursement should be within the loan period that is selected on the loan itself. Any data falling outside of the loan period dates is cleared and you must update the data. The new data is validated against the loan period dates to make sure they fall within or equal to the Date, Academic Year, and Loan Payment Period. If they do not support the new loan period dates, the fields are cleared and you are notified as to what information was cleared out, as indicated by a disbursement number and field name. Click **Cancel** to revert all changes to their initial setting.
- Loan Period Seq. and Loan Payment Periods are populated automatically when a direct loan is added in 'Approved' status and there's only one loan period is found in the Academic Year. If multiple loan periods are found within the academic year, CampusNexus Student prompts you to select the appropriate loan period sequence to associate with the loan.

12. CampusNexus Student allows you to disassociate a loan from a Loan Period Sequence if there is no Paid or Ready to Pay disbursement. Disassociating a loan from a Loan Period Sequence means the loan period dates and disbursement dates won't be affected when loan periods and loan payment periods are updated by the SPE. These loans will be evaluated by the SPE based on the academic years and grant payment periods that are associated with these loans instead.

    Similarly, CampusNexus Student allows you to associate a loan with a loan period sequence if there no Paid or Ready to Pay disbursements. You can also change a Loan Period Seq. on the loan if there is no Paid or Ready to Pay disbursements or the loan's Origination Status is 'Approved'.

13. A direct loan that is not associated with any Loan Period Sequence is not saved if the loan period start or end date is outside of the Academic Year's date range. This is applicable to Academic Calendar 5 and 6. A message is displayed informing you that the Loan start and end dates must be within: AY Start date - AY End Date.

    If the Loan Period Seq. is not available, enter the starting date for the loan period in the **Loan Period Start** field. The default date is the start of the academic year. The loan period beginning and ending dates must be within the academic year start and end dates.

14. Enter the ending date for the loan period in the **Loan Period End** field. The default date is the end of the academic year. The loan period beginning and ending dates must be within the academic year start and end dates.

15. Enter the **Start date** for the Academic Year in the AcYr Start field. The default date is the start of the academic year, for a student with an Academic Calendar of 1, 2, 3, 4, or 5 and 6 that do not use Loan Periods. The default date for students that are in Academic Calendars 5 and 6 that do use Loan Periods, is the BBAY Start Date from the Loan Period form. The AcYr Start and End dates do not have to be within the loan period start and end dates.

16. Enter the **End date** for the Academic Year in the AcYr End field. The default date is the end of the academic year, for a student with an Academic Calendar of 1, 2, 3, 4, or 5 and 6 that do not use Loan Periods. The default date for student that are in Academic Calendars 5 and 6 that do use Loan Periods, is the BBAY End Date from the Loan Period form. The AcYr Start and End dates do not have to be within the loan period start and end dates.

17. You can modify the *Ac Yr Start* and *End Dates* for Direct Loans in an Accepted or Batch status by changing the dates through the **Origination Change** button on the Direct Loan form, or by changing the BBAY Start and End

Dates on the Loan Period form if your Direct Loan is associated with a Loan Period.

Changes to the *Ac Yr Start*, *End Dates*, *Loan Period Start*, and *End Dates* are displayed in red until the origination change record has been exported. Once the change record has been exported, the caption on these fields remains red until the response file has been imported.

Note: For Academic Calendar years 5 and 6 that use Loan Periods, the *Ac Yr Start* and *End Dates* are enabled during the origination change process only if the student is in a Permanent Out school status.

18. CampusNexus Student populates the Orig Extract Sent field with the date that the origination record was sent to COD.
19. CampusNexus Student populates the Orig. Ack. Date field with the date the origination acknowledgment was received from COD.
20. The Create Date on the Financial Aid Direct Loan form remains enabled until the origination Status changes to A (Accepted) or B (Batched), at which point the Create Date will become disabled. Additionally, the export process validates the origination against the values in the FaCOD table. If the value violates the validation, an *Invalid Financial Award Create Date* message is displayed.
21. CampusNexus Student initially sets the Origination Status to N to indicate that it is not ready to send to COD.

    - The conditions under which the Origination Status may be set to Ready to Send depends on the institution's policies. CampusNexus Student has a default setting that prevents the Origination Status from being set to Ready to Send unless an ISIR has been received and the COD Grant Status is 'Approved'. With this setting the Origination Status cannot be changed to 'Ready to Send' until the ISIR Received Date has been populated by CampusNexus Student (when an ISIR is received).

      If your institution has enabled the Originate/Certify Estimated Awards option, you can set the Origination Status to 'Ready to Send' when the Award Status is E (Estimated), P (Pending Approval), or A (Approved).

      When the ISIR is on file and approval has been granted, you can change the status to R to indicate that it is ready to send to COD.

      When the origination is batched to send to the COD, CampusNexus Student changes the status to B for batched to send to COD. After this, the change procedures must be employed to make changes to the Loan Origination.

      Origination Status Codes are as follows:

      - N - Not ready to send to COD
      - R - Ready to send to COD
      - B - Batched to send to COD
      - A - Accepted by COD
      - E - Rejected by COD
      - X - Pending credit decision

      If the Origination Status is blank, N, R, or E, the field can be edited, otherwise the field is read-only. When the field is editable, the valid choices are as follows:

      Origination Status Changes

If current origination status is...	... it can be changed to
Blank	N or R

If current origination status is...	... it can be changed to
N	R
R	N
E	N or R

- The Interest Rebate % (percentage) field is read-only if it was configured. Refer to Calculation of Net Disbursement Amounts and Interest Rebate Amounts below.

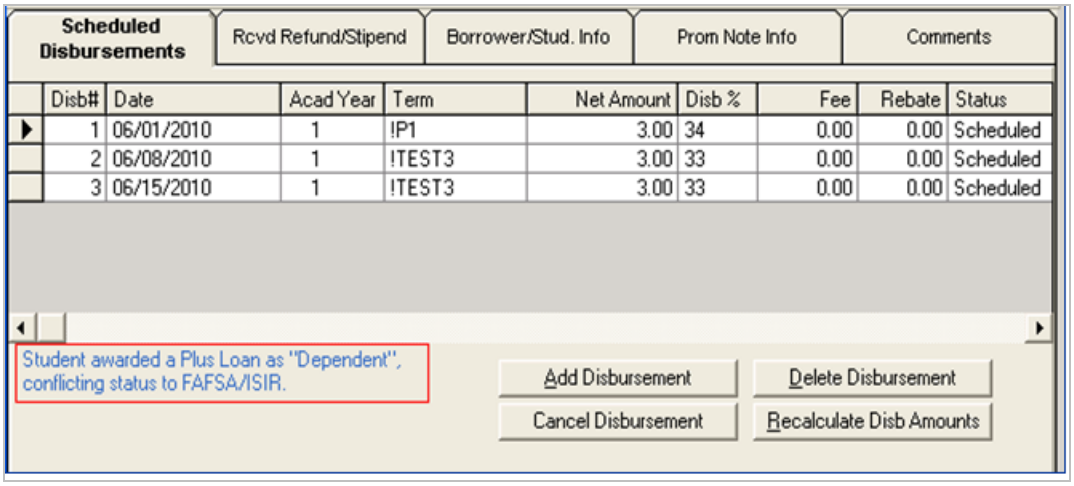
  The Origination Fee % (percentage) is displayed from the Direct Loan Setup form for your campus.

  Note: The Orig Fee% field displays up to three decimal places to accommodate the origination fee percentages for Direct Sub and Direct Unsub loans.

  - If a loan is being added, or a row *does not* exist in FaLoan table for the loan being packaged, the Interest Rebate % is set to `SyDirectLoan.InterestRebate##` where `##` is the last two digits of the award year.
  - If a loan is being edited and a row does exist in the FaLoan table, the contents of FaLoan.InterestRebatePct is displayed in this field.
  - If a loan is added and saved, CampusNexus Student updates FaLoan.InterestRebatePct with the contents of this field.
  - The editable Loan Amount field is displayed for PLUS loans only.

22. Click **Add Disbursement** to add a new disbursement to the list.
23. Click **Delete Disbursement** to remove a disbursement from the list.
24. Click **Cancel Disbursement** to stop a disbursement without removing it from the list.
25. Click **Recalculate Disb Amounts** to calculate the amounts of the disbursements based on the gross, bank fees, net amount and number of disbursements.
26. Click **Save** to save your changes.
27. If you are setting up a new loan, CampusNexus Student prompts you to confirm if the loan is Ready to Originate (send to the COD). The student's ISIR must be on file at the institution before a direct loan can be originated.

    Note: If a student does not have an ISIR on file and has an undetermined dependency status/model, you must assign the student with a Dependent status/model when packaging a FFEL or Direct parent PLUS loan. If a dependency status conflict occurs, the following message is displayed:



CampusNexus Student prompts you to confirm if you want to Print the Prom Note.

28. After saving the loan data and processing the other options, CampusNexus Student closes the direct loan form.

    Note: If, during the process of saving the direct loan, you exceed the institution's commitment level for direct loans in the FA General Ledger records, CampusNexus Student displays a message indicating the amount by which the commitment has been exceeded. This is a warning that something must be presented to adjust your commitment level in the FA G/L system. Click **OK** to acknowledge the message.

29. *Optional*: Click the **Comments** tab to view existing comments, edit, or add comments.

ISIR Requirements

The Department of Education requires that a student must have an ISIR on file for origination of all Direct Loans, except a PLUS Loan. This exception only applies if the student does not have any other Title IV Aid on file for the same award year as the Plus Loan. If there are other Title IV Funds on file for that award year, an ISIR is required. This will impact COD Participants as follows:

- When saving a Full or Phase-In Participant Direct PLUS Loan with an origination status of Not Ready to Send to COD, CampusNexus Student no longer displays the message *ISIR must be on file before loan can be originated* if the student has no other Title IV Aid on file for the award year.
- For Full Participants, CampusNexus Student no longer checks for an ISIR when displaying Direct PLUS loans on the export list if the student has no other Title IV Aid on file for the award year.
- When exporting Full Participant Direct PLUS Loan for a student who has no ISIR and no other Title IV Aid on file for the award year, CampusNexus Student creates the student identifier tag from the student SSN, date of birth, and last name.
- For Phase-In Participants, CampusNexus Student skips the check for dependency status when determining whether a Direct PLUS Loan shall be included in the export file if the student has no other Title IV Aid on file for the award year.

Validations for Direct Loans

A valid Direct Loan school code must be on file before a loan can be added.

If a Direct PLUS loan is added, CampusNexus Student verifies that the student's model status is 'Dependent'. This information is in the FaStudentPell table. CampusNexus Student finds the record for the award year being packaged. If the student's model is Independent or Undetermined, CampusNexus Student does not proceed with setting up the PLUS loan. You must assign the student with a Dependent status/model when packaging a FFEL or Direct parent PLUS loan. Then, CampusNexus Student updates the student's record and the new dependency status/model will be visible on the student record, allowing the packaging to proceed as normal.

The number of disbursements for a direct loan must be equal or greater than two and less than or equal to 20.

Once a loan origination record has been sent to the Common Origination and Disbursement (COD), any subsequent changes made to any field included in the loan origination record will be captured by CampusNexus Student and subsequently sent to the COD.

The business rule that controls Financial Aid loan disbursements prevents the canceling of paid disbursements. The proper procedure after disbursements have been paid is to refund the payments.

Calculation of Net Disbursement Amounts and Interest Rebate Amounts

The Interest Rebate % field is used to calculate net disbursement amounts and the interest rebate amount for each disbursement. In prior years, the net disbursement amount was calculated using the calculated gross disbursement amount and the loan fee percentage. The interest rebate percentage is now a third element that must be taken into account when calculating the net disbursement amount. Examples of how the net disbursement amounts and the interest rebate amount are documented in the *Direct Loan Technical Reference*.

Direct Loan Disbursements

You can add, cancel, or delete a disbursement from the Scheduled Disbursements tab on the Direct Loan form for direct loan fund source types (DIRSUB, DIRUNSUB, and DIRPLUS).

Scheduled disbursements are created when:

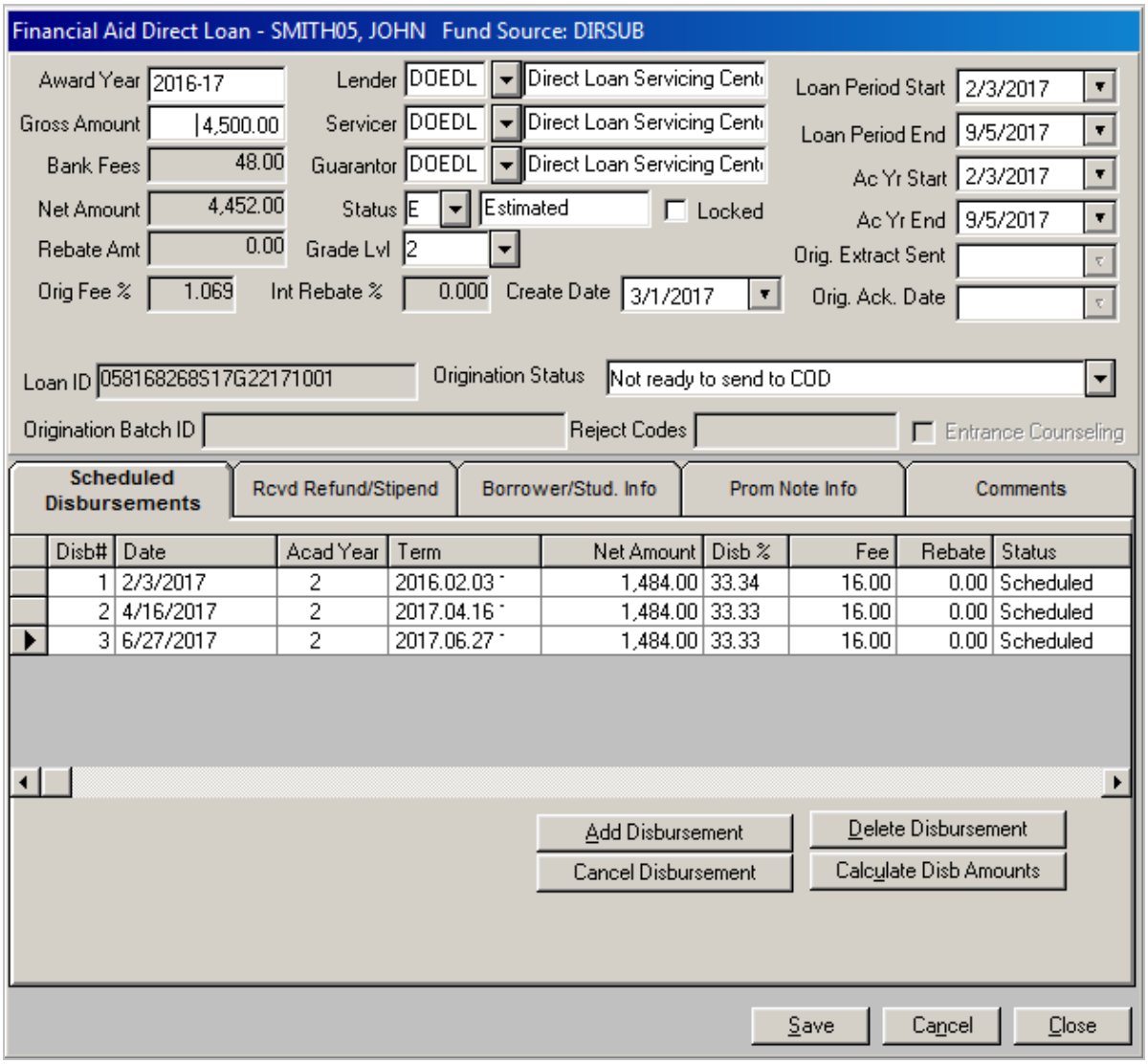
a. You add a new loan and select an award status of Approved or Pending Approval;

b. You click the Add Disbursement or Calculate Disbursement buttons on the Direct Loan form.

The Scheduled Disbursement list within the Scheduled Disbursements tab is not created when a new Direct loan is added with a status of Estimated. Individual disbursements with a status of Paid or Canceled cannot be edited.

To work with Direct Loan Disbursements:

1. Access the Direct Loan form. The Scheduled Disbursements tab is displayed.



2. Complete the fields on this form as needed. See Field Descriptions.

Note:

When FA disbursements are posted as received on the student's ledger card from the Student Accounts Payments form or from the Post FA Disbursements form, CampusNexus Student updates the Student Academic Year ID column in the FA Disbursements table.

When a student is dropped, financial aid is canceled. If the student is reinstated, financial aid must be "re-expected". Scheduled disbursements are not automatically changed back to scheduled. Review scheduled disbursements for each fund source to "re-expect" the disbursements that still apply.

Field Descriptions

Field	Description
Disb #	Sequential number of the scheduled disbursement. The minimum number of disbursements is 2; the maximum is 20.
Date	Select the expected date of the disbursement. **Note**: The Scheduled Disbursement date can be changed to a date outside both the Loan Period and Academic Year dates for non-term Academic Calendars.
Acad Year	Academic year number to which the disbursement applies. You can edit the "Acad Year" for each disbursement if the disbursement passes the criteria required for editing the field. If the academic year can be edited and you edit this field, a drop-down list is displayed showing each academic year for this student's enrollment. Each record displayed in the list shows the academic year number, academic year start date, and academic year end date. When new scheduled disbursements are added for the FA Direct Loan, CampusNexus Student defaults the academic year for each disbursement to the academic year being packaged.
Term	Enter the term code or select it from the drop-down list. To select the term to which the disbursement applies, click in the term cell to be selected and click . The Term code can be edited only for disbursements that have a status of Scheduled (S).
Net Amount	Read-only. Net amount as calculated based on this disbursement's percentage of the total net amount.

Field	Description
Disb %	Percentage of the total loan gross amount to be distributed to this disbursement. The defaults come from the Academic Year setup. You can edit the disbursement percentage for each disbursement. The percentages must add up to 100%. If you click **Recalculate Disb Amounts**, you are prompted to specify the percentage for each existing disbursement. If no disbursements currently exist, you are prompted to enter a disbursement percentage for the number of disbursements specified for a loan for this student's packaging method. If you click **Add Disbursement** or **Delete Disbursement**, the percentages are edited. CampusNexus Student displays a grid in which you can enter the percentages. • If you click **Add Disbursement**, the number of disbursements displayed on the grid will be one more than the number of existing disbursements. • If you click **Delete Disbursement**, the number of disbursements displayed on the grid will be one less than the number of disbursements previously listed.
Fee	Read-only. The fee associated with each disbursement as calculated based on this disbursement's percentage of the total fee amount.
Rebate	The Rebate column is displayed only if the award year for the loan is 2001-02 or beyond. The rebate for each disbursement is calculated using the formulas documented in the Direct Loan technical reference on Pages 3-56 to 3-63. If the user edits a loan, the values for the Rebate column are retrieved from FaSched.InterestRebateAmt. When a loan is added or the disbursements are edited, the program updates the Rebate amounts for each disbursement to FaSched.InterestRebateAmt.
Status	Scheduled, Paid, or Cancelled.
Disbursement Tracking Status Codes	N - Not ready to send to COD R - Ready to send to COD B - Batched to send to COD A - Accepted by COD E - Rejected by COD
Act Disb Date	The Automated COD Export Process enabled users to configure if the COD Export Process should exclude Holidays and/or Weekends when determining the Actual Disbursement Date (calculation) that is reported to COD for the day disbursements are to be paid. **When Automated Processes is activated**, authorized users can view the calculated date in the Act Disb Date column on the Financial Aid Direct Loan screen. If neither option is selected, NA is displayed in this column.

3. Click **Add Disbursement** to add a new disbursement to the direct loan. After adding a new disbursement, click **Recalculate Disb Amounts**.
4. Select a disbursement and click **Delete Disbursement** to delete it. If you do, it is gone irretrievably. After deleting a disbursement, click **Recalculate Disb Amounts**.
5. Select a disbursement and click **Cancel Disbursement** to cancel it. It remains on the list but shows a status of Canceled.
6. Click **Recalculate Disb Amounts** to recalculate the distribution of the net amount over the number of

disbursements.

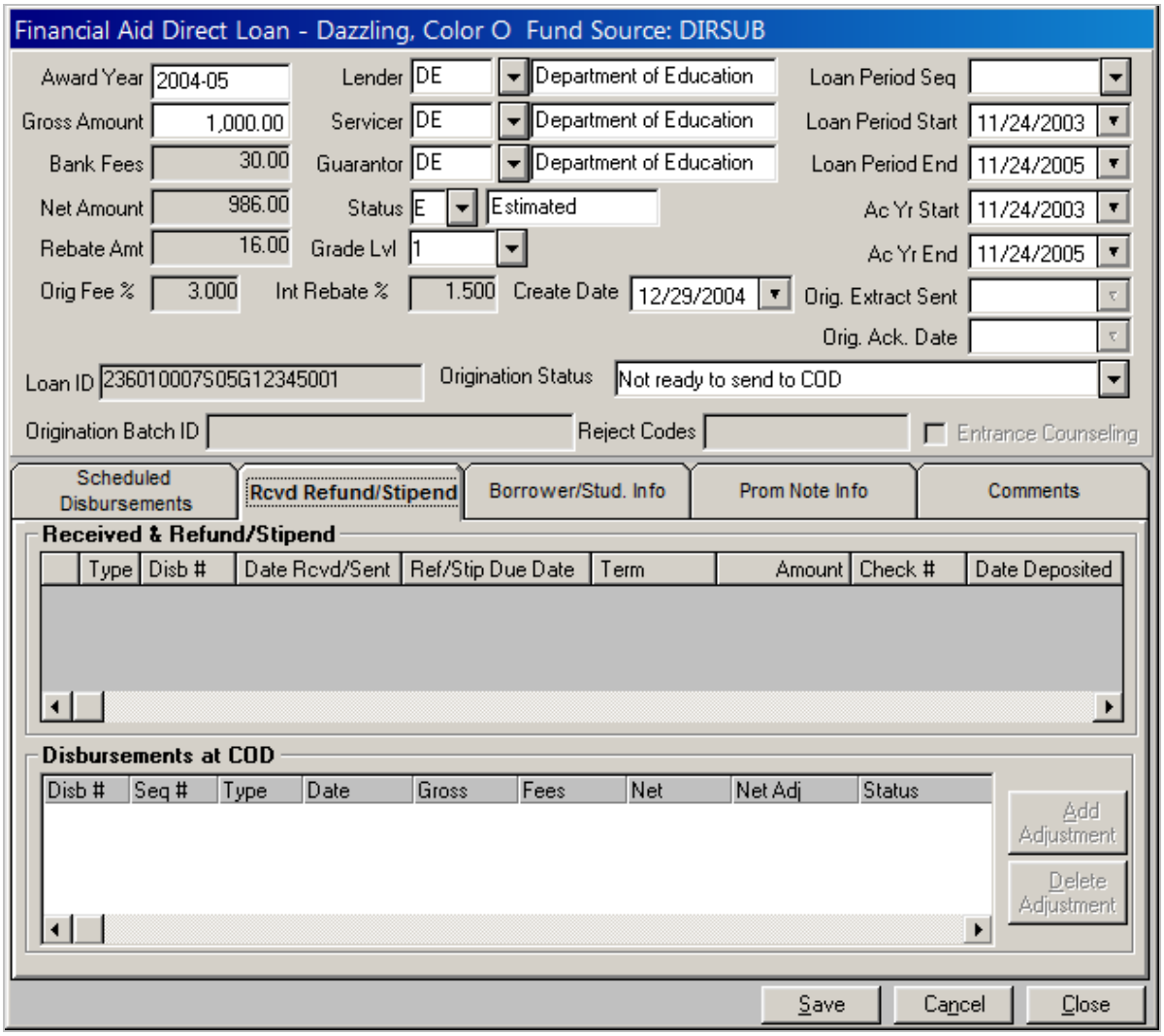
When no disbursements are scheduled, the Recalculate Disb Amounts button is not displayed. Instead, a **Calculate Disbursements** button is displayed. When this button is clicked, an expected disbursement schedule is created.

Received Refund/Stipend

You can add or delete adjustment transactions in the Disbursements at COD table to reconcile differences in loan details between CampusNexus Student and COD. The table of Disbursements at COD is a list of loan transaction traffic to and from the Loan Origination Center. Changes you make in this table result in a transaction that is sent to COD. Disbursements received transactions, refunds, and stipends are handled in the Student Accounts Department.

To work with Direct Loan Received Refunds/Stipends:

1. Access the Direct Loan form.
2. Select the **Rcvd Refund/Stipend** tab.



3. Complete the fields on this form as needed. See Field Descriptions.

Field Descriptions

Field	Description
Received Refund/Stipend	
Type	Type of transaction. The types are D - Disbursement, R - Refund, and S - Stipends.
Disb #	Disbursement number from the table on the disbursements tab.
Date Rcvd/Sent	Date disbursements were received and posted or refunds were made.
Ref/Stip Due Date	Calculated date refunds are due to be received by COD or stipends are due to be received by the student. The Student Accounts Stipend Schedule Date Scheduled is listed in this column for scheduled stipends.
Term	Term to which the transaction applies
Amount	Amount of the transaction
Check #	Number of the disbursement check from COD, the refund check to COD, or the stipend check to the student. It may be the number of an EFT transaction.
Date Deposited	Date a disbursement check was deposited in the school's bank account. It may be used as the date of the EFT deposit.
Date Signed	Date the student signed a receipt for the disbursement. It may be an endorsement on a check or an EFT receipt.
Batch ID	Identifier for the transaction batch in which the disbursement was processed by Student Accounts.
Status	For disbursements, scheduled or paid; for refunds and stipends, posted or not sent.
Disbursements at COD - This section displays all disbursement records that have been sent to or are waiting to be sent to COD. Each disbursement record has an accompanying status at COD. **Note:** Direct Loan disbursement/adjustment records for award years 2014-15 and forward display the Enrollment Status, Payment Period Start Date, and CIP code in the Disbursements at COD section of the award.	
Disb #	Disbursement number (1 - 20)
Seq #	Sequence number of the transactions related to the disbursement number, in other words, 001 is the original scheduled disbursement, 002 is the first adjustment to the disbursement, 003 is the second adjustment, etc.
Type	Type of transaction, disbursement or refund
Date	Transaction date of the disbursement or refund record
Gross	Gross amount of the disbursement
Fees	Amount of the fees related to the disbursement
Net	Net amount of the disbursement.
Net Adj	Adjustment to the net amount of the disbursement.

Field	Description
Status	Status of the disbursement or adjustment; ready to send, sent, accepted, or rejected.
Prev Seq #	Record number for the previous transaction associated with the disbursement, as provided by COD.
Net Adj	Adjustment to the net amount of the disbursement.
Status	Status of the disbursement or adjustment; ready to send, sent, accepted, or rejected.
Prev Seq #	Record number for the previous transaction associated with the disbursement, as provided by COD.
COD Comment Codes	List of all COD edit (comment) codes associated with the Disbursement import response.
Enrollment Status	Student's enrollment status at the time the record was created. (Academic Year 2014-15 and Forward)
Payment Period Start Date	Payment Period start date for the disbursements or adjustments. (Academic Year 2014-15 and Forward)
CIP Code	Program CIP Code associated with the disbursement or adjustment. (Academic Year 2014-15 and Forward)
Batch ID	Number of the batch in which the transaction was exported to or imported from COD.

4. Use the Add and Delete Adjustment buttons to enter manual adjustments to disbursement records to correct a disbursement that is on file at COD for an incorrect amount:

   - Click **Add Adjustment** to add an adjustment transaction to a disbursement.

     CampusNexus Student adds a direct loan disbursement adjustment to send to COD. The ability to add an adjustment resides on the Student Direct Loan form. The Add adjustment button is enabled only if a row exists for the loan in the FA Loan table, the origination status of the loan is Batched to Send, Accepted or Pending (B, A, or X), and at least one row exists for the loan in the FA Schedule table where the Disbursement Number is greater than zero.

   - Click **Delete Adjustment** to delete an adjustment transaction from a disbursement.

     You can delete a disbursement adjustment that is awaiting transmission to COD. The ability to delete a disbursement adjustment resides on the Student Direct Loan form. The Delete adjustment button is enabled only if a row exists in the FA Direct Loan Disbursement table for the loan being edited. If Delete Adjustment is clicked, the selected disbursement adjustment row from the grid will be deleted.

5. CampusNexus Student allows the status of a rejected disbursement record to be changed to "Ready to Send". The Status column on the Disbursements at COD grid may be edited for a row only if the Disbursement Status is "E". If this is the case, a drop-down list is provided on the Status field, listing one choice - R - Ready to Send. CampusNexus Student updates the FA Direct Loan Disbursement Status with "R" for any rows where the disbursement status was changed from E to R.

6. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

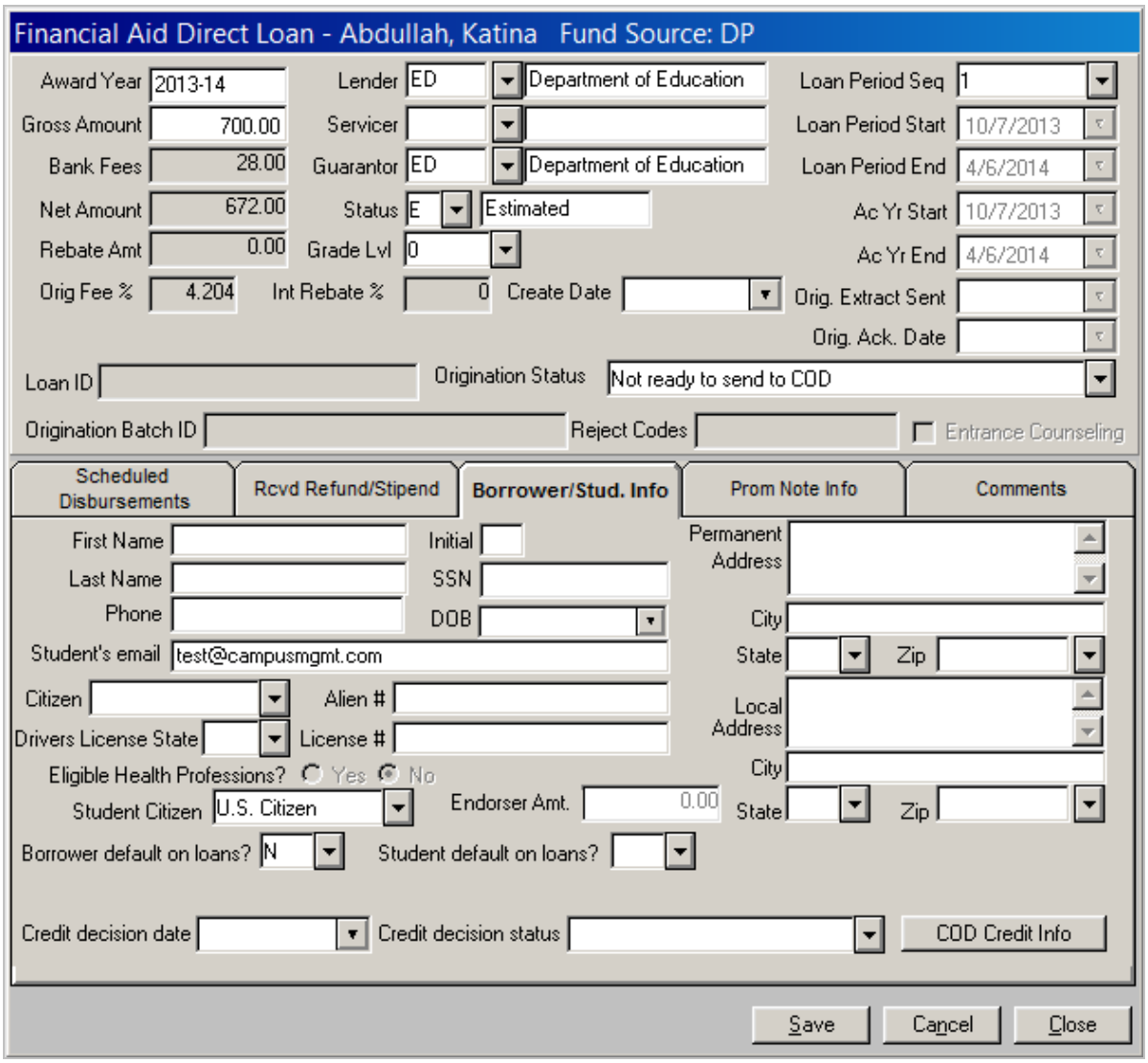
Borrower/Student Information

The Borrower/Student Info tab on the Financial Aid Direct Loan form shows basic information about the borrower. The borrower can be the student or the student's parents (PLUS loan). If the borrower is the student, data from the Student Master record is filled in. Data entered on this part of the form does not update the student's CampusNexus Student master record. It is kept in a separate loan master record.

- If the fund source type is DIRSUB or DIRUNSUB, the borrower is the student. CampusNexus Student sets all borrower information to the student's information by default.
- If the fund source type is PLUS, CampusNexus Student sets the borrower information to the parent's information (address type file - parent) by default.

To work with the Direct Loan Borrower/Student Info:

1. Access the Direct Loan form.
2. Select the **Borrower/Student Info** tab.



3. Enter the name of the borrower in the **First Name**, **Initial**, and **Last Name** fields. If the borrower is the student,

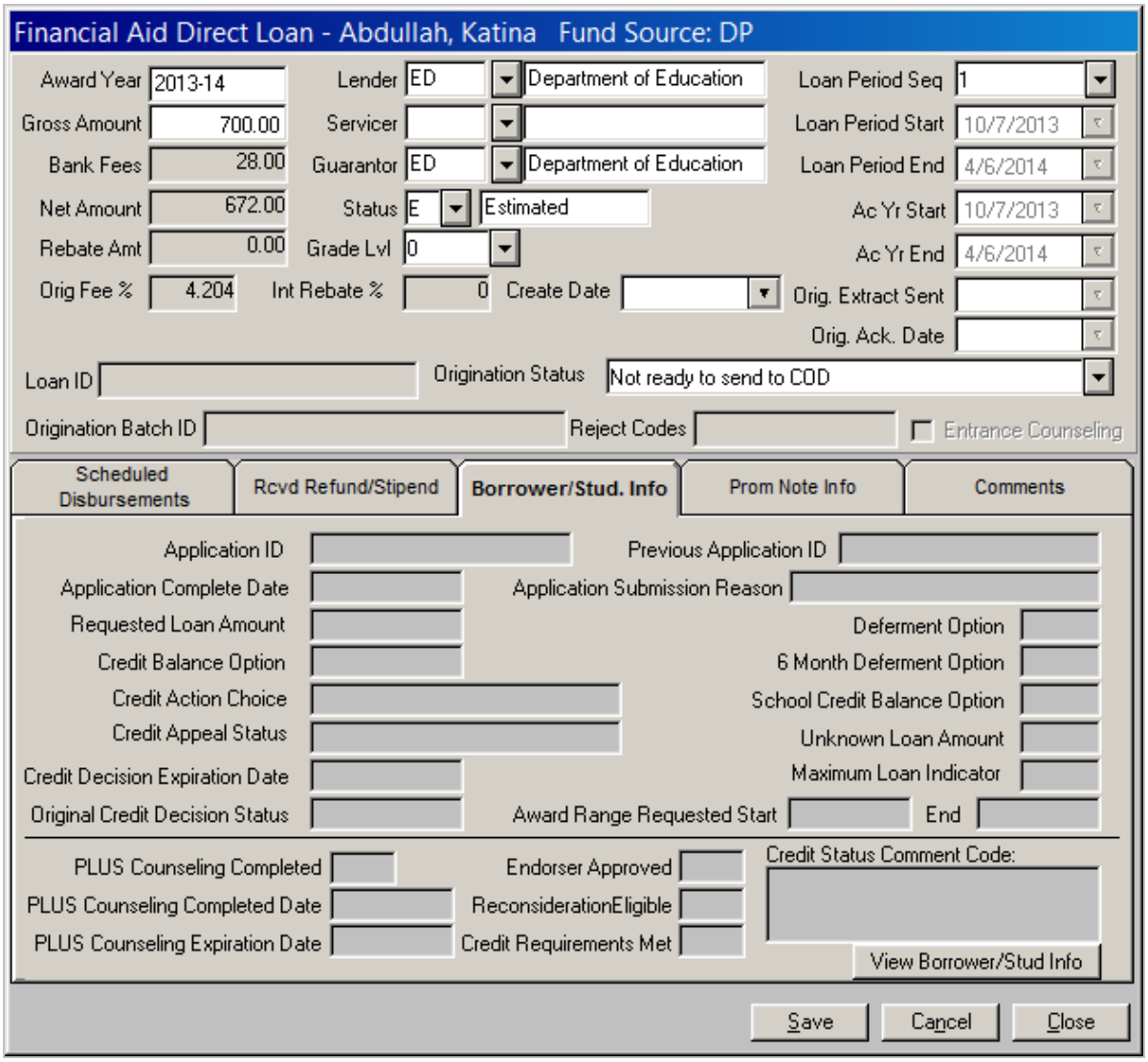
CampusNexus Student fills in the name and address information from the student master record. If the borrower is the student's parent, enter the parent's information on this form.

4. Enter the borrower's social security number in the **SSN** field.
5. Enter the borrower's telephone number in the **Phone** field.
6. Enter the borrower's date of birth in the **DOB** field.
7. The email address for the origination record is retrieved from the existing student email field and displayed in the **Student's email** field. This field is included in the borrower information that is displayed/edited when packaging a direct loan. You can enter a new value. The email field is not editable if the origination status is A, B, or X.
8. Select the borrower's **citizenship** characteristic. The options are:
   - U.S. Citizen
   - Eligible Non-Citizen
   - Ineligible Non-Citizen
9. If the borrower *is not* a U.S. Citizen, enter the borrower's alien identification number in the **Alien #** field.
10. Select the state in which the borrower's driver license was issued from the **Drivers License State** list.
11. Enter the borrower's driver license number in the **License #** field.
12. If the student is eligible for additional loan amounts due to being enrolled in health-care related studies, select **Yes** in the **Eligibility up to HEAL amount** field, otherwise select **No**.
13. The **Additional UNSUB Eligibility** field is displayed for UNSUB loans only and represents the additional amount of unsubsidized loans for which the student is eligible.
14. Select **Yes** from the **Borrower default on loans?** list if the borrower is in default on previous loans, otherwise, select No. You can also select a **Z** value for **Overridden by School** option.
15. The **Credit Decision Date** field only appears for PLUS loans and can be edited.
16. The **Credit Decision Status** field only appears for PLUS loans and can be edited. Valid values are:

    A - Credit accepted
    F - Credit Denied
    N - The credit decision has changed from Pending to Denied or Accepted
    D - Credit Denied; Endorser Denial
    E - Credit Overridden; Endorser Approved
    C - Credit Overridden; New Info Provided
    P - Pending

    Note To ensure direct PLUS loan disbursements are exported, you must ensure:

    - The MPN Link Indicator is Y.
      - AND -
    - The value selected in the Credit Decision Status field is A, E, or C.
17. The **COD Credit Info** button is displayed only in the case of Direct PLUS loans. Clicking this button displays the fields shown and described below.



Field Descriptions

Field	Description
Application ID	Unique application identifier that is returned to institutions on PLUS Application Acknowledgments.
Application Complete Date	Date PLUS Application was completed by borrower.
Requested Loan Amount	Total amount of loan requested by borrower when completing a PLUS Application.
Credit Balance Option	Credit balance on a loan should be directed to the student (S) or borrower (B). • B = Borrower • S = Student

Field	Description
Credit Action Choice	Action borrower plans once borrower has failed the credit check. • A = Appeal Decision • E = Pursue Endorser • N = Not Pursue PLUS Loan (Process Additional Unsubsidized Loan if Eligible) • U = Undecided
Credit Appeal Status	Current status of a credit appeal. • A = Appeal Accepted • D = Appeal Denied • P = Appeal Pending • R = Appeal Closed Without Final Decision
Credit Decision Expiration Date	Date on which a potential borrower's credit decision will expire, requiring another credit check prior to originating a PLUS loan.
Original Credit Decision Status	Initial credit decision for a borrower. • A = Accepted • D = Denied • P = Pending
Previous Application ID	Identifier indicating a previously submitted application.
Application Submission Reason	String (max. length 30 characters) indicating the reason for the PLUS Application submission.
Deferment Option	Repayment deferment option based on student's enrollment status.
6 Month Deferment Option	Indicates whether the borrower wants to defer repayment of their Direct PLUS Loan for 6 months beginning on the date the student on whose behalf the loan was obtained ceases to be enrolled on at least a half-time basis. • True = Six Month Deferment Option used • False = Six Month Deferment Option not used
School Credit Balance Option	Indicates whether any remaining credit balance should be applied to the institution. • True = Remaining balance should be applied to institution • False = Remaining balance should be applied to borrower
Unknown Loan Amount	Indicates whether the borrower knows the Loan Amount for the PLUS Application. • True = The borrower does not know the loan amount
Maximum Loan Indicator	Indicates whether the borrower wants to borrow the maximum loan amount determined by the institution. • True = Borrower has requested maximum loan amount as determined by the institution • False = Borrower has not requested the maximum loan amount
Award Range Requested Start and End Dates	The **start date** and **end date** for which the borrower is requesting the loan.

Field	Description
PLUS Counseling Completed	Indicates whether borrower has completed PLUS Counseling - either Yes or No.
PLUS Counseling Completed Date	Date on which a borrower's PLUS Counseling was completed.
PLUS Counseling Expiration Date	Date on which a borrower's PLUS Counseling expires.
Endorser Approved	Indicates if the borrower has been approved - either Yes or No.
Reconsideration Eligible	Indicates if borrower is eligible for loan reconsideration - either Yes or No.
Credit Requirements Met	Indicates if the borrower has met the credit requirements - either Yes or No.
Credit Status Comment Code	Displays the numerical Credit Status Comment Code for the borrower.

Review the information in these read-only fields. Click **View Borrower/Stud Info** to return to the previous screen.

18. Enter the borrower's **Permanent Address, City, State and ZIP** in the appropriate fields.
19. Enter the borrower's **Local Address, City, State and ZIP** in the appropriate fields. When the student is the borrower, the local address information defaults to the same fields to which the permanent address information is defaulted. In other words, the local address contains the same data as the permanent address.

    Note: If an address on a student record has more than 40 characters, the additional characters in the address line will not be extracted to be sent to COD, but will be truncated. If a Post Office Box number or Apartment number causes the address line to exceed 40 characters, some elements of the Street Address line must be abbreviated.
20. The **Special Program** field is used to indicate if the student is enrolled in a Special Program. The Special Program default value is pulled from the Program Version. This field will only be displayed for award year 2014-15 and thereafter. Valid values are:

    A - Selective Admission Associated Program
    B - Bachelors Degree Completion Program
    N - Not Applicable
    P - Preparatory Coursework Graduate Professional Program
    T - Non Credential Teacher Certification Program
    U - Preparatory Coursework Undergraduate Program
21. Select **Preparatory Professional Course Work** if applicable. This option allows users to designate whether the loan is for Preparatory coursework (to enroll in graduate or professional program) or Teacher Certification. If the option is selected, a new tag <PreprofessionalCourseworkIndicator> is included in the COD Common Records as defined in the COD Technical Reference. The Grade Level for the loan is 5, the maximum Subsidized Stafford loan limit $5,500, and the combined Maximum $12,500 limit for loans will be applied.

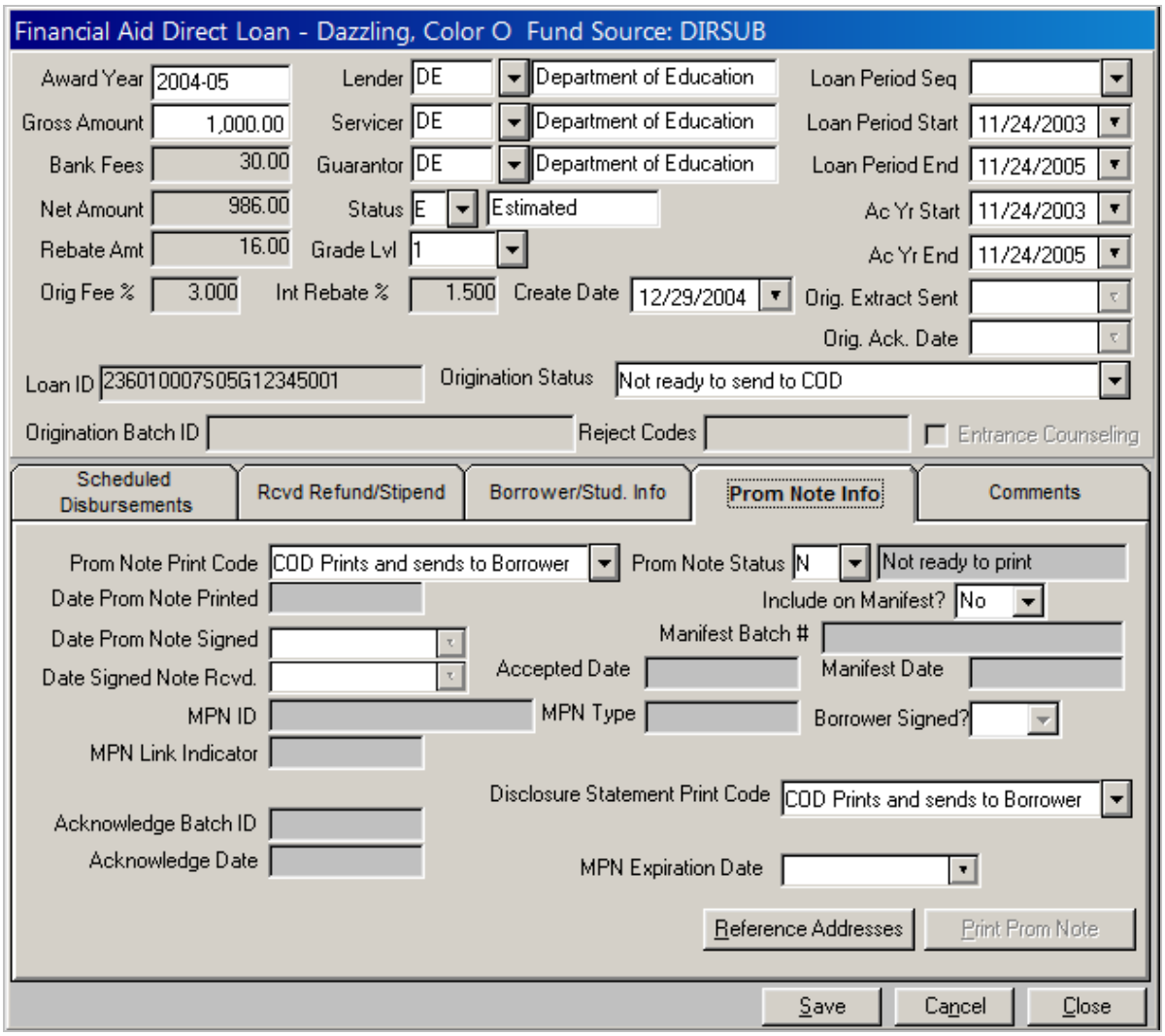
    Note: This flag is only accepted by COD when a loan is submitted that has a first disbursement date on or after July 1, 2007.

Prom Note Information

The Prom Note Information tab on the Financial Aid Direct Loan form provides information about the status of the promissory note and disclosure statement. The form for promissory note information with loans other than direct loans is considerably different than the one described here.

To work with the Direct Loan Prom Note Information:

1. Access the Direct Loan form.
2. Select the **Prom Note Info** tab.



The **Prom Note Print Code** field indicates where the promissory note is printed and must be configured. Valid options are:

- **S** - COD prints and sends to borrower
- **R** - COD prints and sends to institution
- **Z** - COD reprints and sends to borrower
- **V** - COD reprints and sends to institution
- **O** - Institution prints
- **E** - Electronic (only sent in the rebuild file)

3. Select one of the following valid values from the **Prom Note Status** list:

- **N** - Not ready to print (default for new loan)
- **R** - Ready to print
- **S** - Signed
- **P** - Printed (automatic)

- **X** - Pending (automatic)
- **A** - Accepted by COD (automatic)
- **E** - Rejected by COD (automatic)
- **I** - Inactive
- **E** - Inactive - Endorser Linked; Inactive due to the linking of a PLUS loan with an endorser
- **C** - Closed

4. The **Prom Note Status** field is enabled only if a new loan is added, or the **Prom Note Status** is blank, N, or R; otherwise the field is disabled.

   If you are adding a loan and print the prom note while adding the loan, and the **Prom Note Status** is changed to **P** once it was printed successfully, the field is disabled even though the loan is still being added.

   If the **Prom Note Status** is "Printed" and you change **Borrower Signed** field to Yes, CampusNexus Student automatically changes the **Prom Note Status** to Signed (S) and **Include on Manifest** to Yes.

5. The **Date Prom Note Printed** field is a read-only field.

6. Select **Yes** from the **Include on Manifest?** list, if the promissory note is to be included on the manifest of notes being sent to the COD. Select **No** if not.

   The Include on Manifest field is enabled only if the Prom Note Status is Signed or Rejected (S or E), and the Manifest Batch ID is not empty.

7. Select the date on which the borrower signed the promissory note from the **Date Prom Note Signed** calendar. The **Date Prom Note Signed** field is *enabled* only if the **Borrower Signed** field is *Yes*.

8. The **Manifest Batch #** field represents the number of the manifest batch in which the promissory note was sent to the COD, and is a read-only field.

9. The identification number that identifies this prom note is displayed in the **Printed Prom Note ID** field. The caption is *Accepted MPN ID* or *Printed MPN ID* depending on the **Prom Note Status**. A value will not appear in the field if the loan is a Direct PLUS loan.

10. The **MPN Link Indicator** field is a read-only field and is displayed when the loan-origination acknowledgement file is imported.

    Note: If an institution has Automated Processes enabled, Stafford loan disbursements are exported only if the MPN Link Indicator field is Y.

11. The **MPN ID** has been removed from the Loan Origination Acknowledgement record for Stafford loans, and has been replaced with a one character MPN indicator field specifying if the loan has been linked to a valid MPN at COD. It contain a 'Y' for Yes or an 'N' for No. This field is displayed only for DIRSUB or DIRUNSUB loans. It is not displayed for PLUS loans. If you are adding a loan, this field is blank. If you are editing a loan and a row exists in the FA Loan table for the loan being edited, the program displays the contents of FaLoan.MPNIndicator.

12. The **MPN Type** field indicates the type of promissory note for the selected loan. P possible indicators are Electronic, Paper, or Web. This information comes from the Prom Note Acknowledgement Import file.

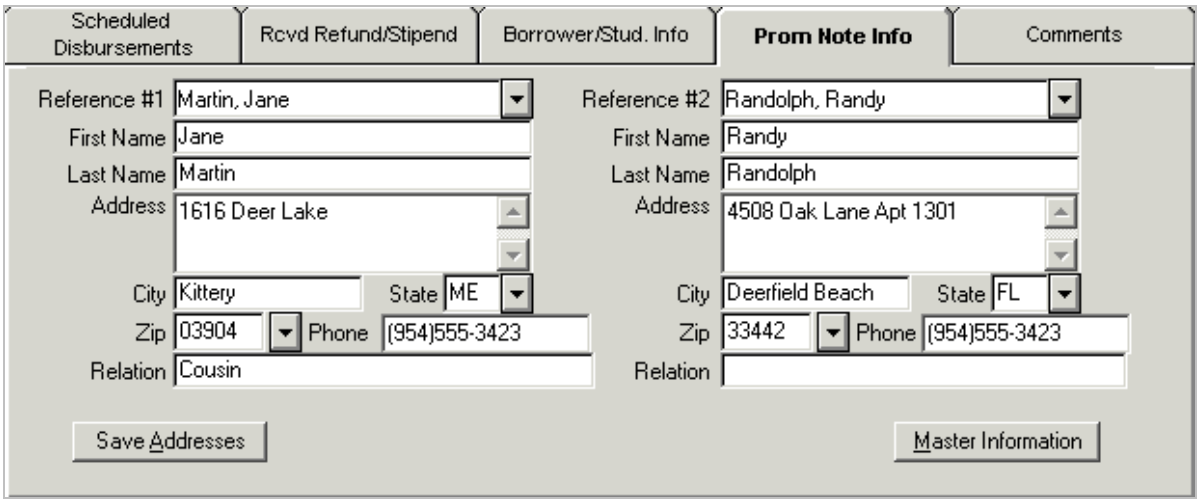
13. Select **Yes** from the **Borrower Signed?** list if the borrower has signed the promissory note, or **No** if not. The field is enabled only if the Prom Note Status is P (Printed), or the Prom Note Status is S (Signed) and the Manifest Batch ID is empty.

14. Select **Yes** or **No** from the **Student Signed?** list. The field is visible only if it is a PLUS loan and is enabled using the same criteria as the **Borrower signed** field.

15. The **Accepted Date** represents the date on which the promissory note was accepted by the COD. It is a read-only

field.

16. The **Manifest Date** represents the date on which the manifest of promissory notes was sent to the COD. It is a read-only field.
17. The **Acknowledge Batch ID** represents the identification number of the promissory note acknowledgement batch, and is a read-only field.
18. The **Acknowledge Date** represents a date on which the promissory note acknowledgement was received, and is a read-only field.
19. The **Disclosure Statement Print Indicator** field is a read-only field.
20. The **MPN Expiration Date** is updated with value from COD import file. A new <MPNExpirationDate> tag is included in the response block of the COD Common Record received from COD.
21. The **Date Disclosure Statement Printed** field is a read-only field.
22. Click **Print Disclosure Stmt** to print the direct loan disclosure statement to be given to the borrower. This button is visible only if disclosure statements are printed at the institution. This button is enabled if disclosure statements are printed at your institution rather than the COD. This is another setup option.
23. Click **Reference Addresses** to view, select, or enter references for this borrower. When the form loads, the program looks in the Address table for addresses with a type code of "Reference". You can select records from the student's address list or enter new ones.



    a. To add a new address, select **<New Address>** in the Reference #1 or Reference #2 list.
    b. Enter the name and address data.
    c. To select a reference address that is already on file, select the address from the Reference #1 or Reference #2 drop-down list.
    d. Click **Save Addresses** to save new addresses or changes. The addresses are saved in the Address table with a type code of "Reference".
    e. Click **Master Information** to return to the Prom Note Info tab.
24. The Print Prom Note button is enabled only when the **Prom Note Status** is R, P, or S and the **Prom Note Print** indicator is F - On-Site.

25. If disclosure statements are printed at your institution location, click the Print Disclosure Stmt button.
26. Click **Save**.
27. Return to the Direct Loan Form.

Note: A message is displayed when you try to save loans where first disbursement date is after July 1st, 2007 and the origination fee is not 2.5 %.

Print Prom Note

If promissory notes are printed at your institution location, click **Print Prom Note** to print the note for the selected direct loan.

To print a promissory note:

1. Click **Print Prom Note**. CampusNexus Student displays a message asking if this is a non-negotiable note.
2. If you are printing the original, enforceable, note that will be signed by the borrower, click **No**. If you are printing a copy of the note for information purposes only, click **Yes**.
3. In either case, the prom note report will be loaded and displayed in the Preview window. After printing the prom note, close the form.
4. If you answered **Yes** in step 2 above, CampusNexus Student returns to the Direct Loan form with no further action. If you answered **No** in step 2 above, CampusNexus Student displays another message asking if the prom note printed successfully.

   Answer **Yes** or **No**as necessary. If you answer **Yes**, CampusNexus Student updates the Prom Note Printed field with a **P**and adds 1 to the Prom Note Print Sequence field. The Prom Note Printed Date and Printed Prom Note ID fields are also updated. If the prom note is for a direct subsidized or unsubsidized student loan (not a PLUS loan), CampusNexus Student checks for other direct student loans and updates data in those records also.
5. If you answer **No** to the message, CampusNexus Student returns to the Direct Loan form without updating any prom note data.
6. The system will update a second Financial Aid Loan record, if applicable, with any prom note-specific fields that have been updated. When updating the Loan table, the following values may be updated to a second loan record: **Prom Note Status**, **Date Prom Note Printed**, **Include on Manifest**, **Date Prom Note Signed**, **Date Signed Note Received**, **Borrower Signed**, and **Master Prom Note (MPN) ID**.

A second Loan record may be updated only if the loan being edited is a Sub or Unsub loan. When updating, the program checks if another row exists in the Loan table for the student where the fund source is Sub (if editing an Unsub loan), or Unsub (if editing a Sub loan), and the last 3 digits of the Direct Loan ID equals the last 3 digits of the loan ID for the loan you are editing.

Print Disclosure Statement

You can print your own disclosure statements, or use the one from COD. The **Print Disclosure Stmt** button is visible only if disclosure statements are printed at the institution.

- Click the **Print Disclosure Stmt** button. The disclosure statement will print on pre-printed forms just like the prom notes. All information on the disclosure statement is printed in a large white-space area. The only requirement is that all the information printed fits within the white-space area.

CampusNexus Student prints the following fields on the disclosure statement: Borrower Last Name, Borrower First Name, Borrower Middle Initial, Borrower Address, Borrower City, Borrower State, Borrower ZIP, Direct Loan ID, Borrower Phone, Campus Name, Campus Address, Campus City, Campus State, Campus ZIP, School Direct Loan ID, Loan Start Date, Loan End Date, System Date.

The information printed on Section 8 of the Disclosure statement lists all scheduled disbursements. If a student has both a subsidized and unsubsidized loan scheduled, disbursements for both loans are listed. The logic for combining a Sub and Unsub

loan for a student onto one disclosure statement is identical to the grouping logic on the Prom note printing. If a student has a Sub and an Unsub loan packaged for the same award year and the last three digits of the loan ID are the same, the disbursements for both loans are listed. In addition, both loan ID's are listed in Section 2 and both loan periods are listed in Section 6.

For each line in the FA Disbursement Schedule for this loan, the applicable date scheduled, gross amount, origination fee percentage, bank fee, and net amount is displayed.

The fund source description is also listed to the left of the schedule disbursements. The fund source description is listed as one of the following:

- Direct Subsidized Loan
- Direct Unsubsidized Loan
- Direct Plus Loan

After the disclosure statement is printed, you are prompted with the following question: "*Did the disclosure statement print correctly?*"

If you answer Yes, CampusNexus Student updates the **Date Disclosure Printed** field with the system date. If a DIRSUB and DIRUNSUB loan were both included on the Disclosure statement, the **Date Disclosure Printed** fields for both loans are updated.

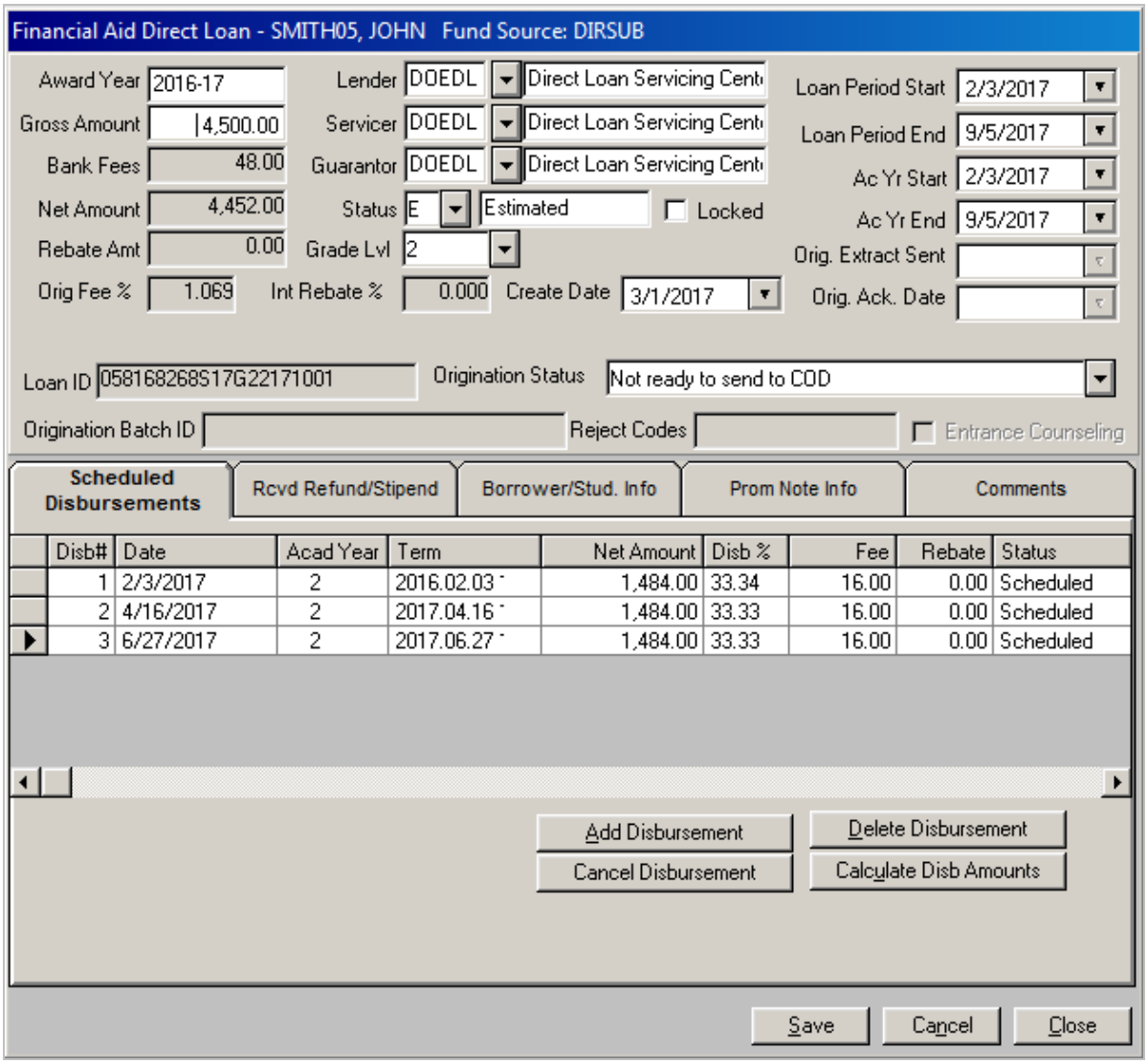
Origination Changes

Origination change records can be created when COD Originations are edited and when loan or academic year dates are updated by Academic related activities, such as adding or removing transfer credits, and using the Student Pace Evaluation (SPE) tool.

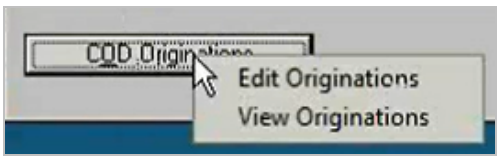
Editing COD Originations

Loan origination changes are only captured if the origination status of the loan being edited is "Accepted", "Batched to Send", or "Pending Credit Decision". If the loan has one of these origination statuses, a COD Originations button is displayed on the Financial Aid Direct Loan form.

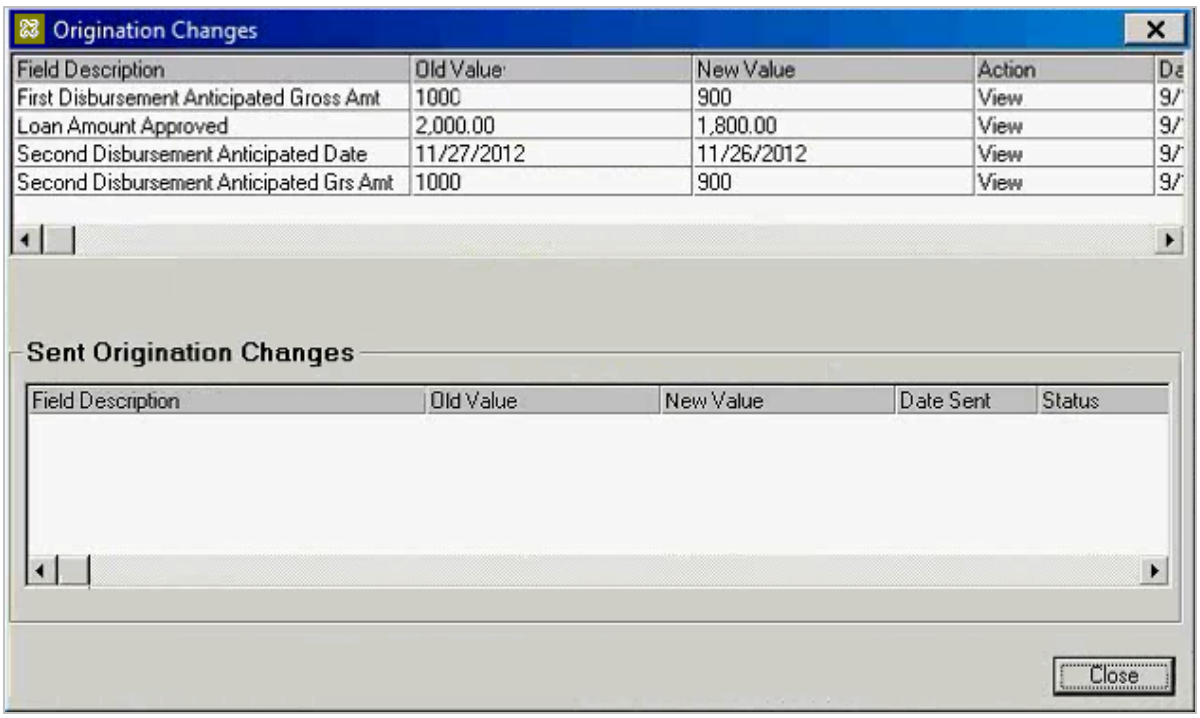
1. Click **COD Originations** on the Financial Aid Direct Loan form.



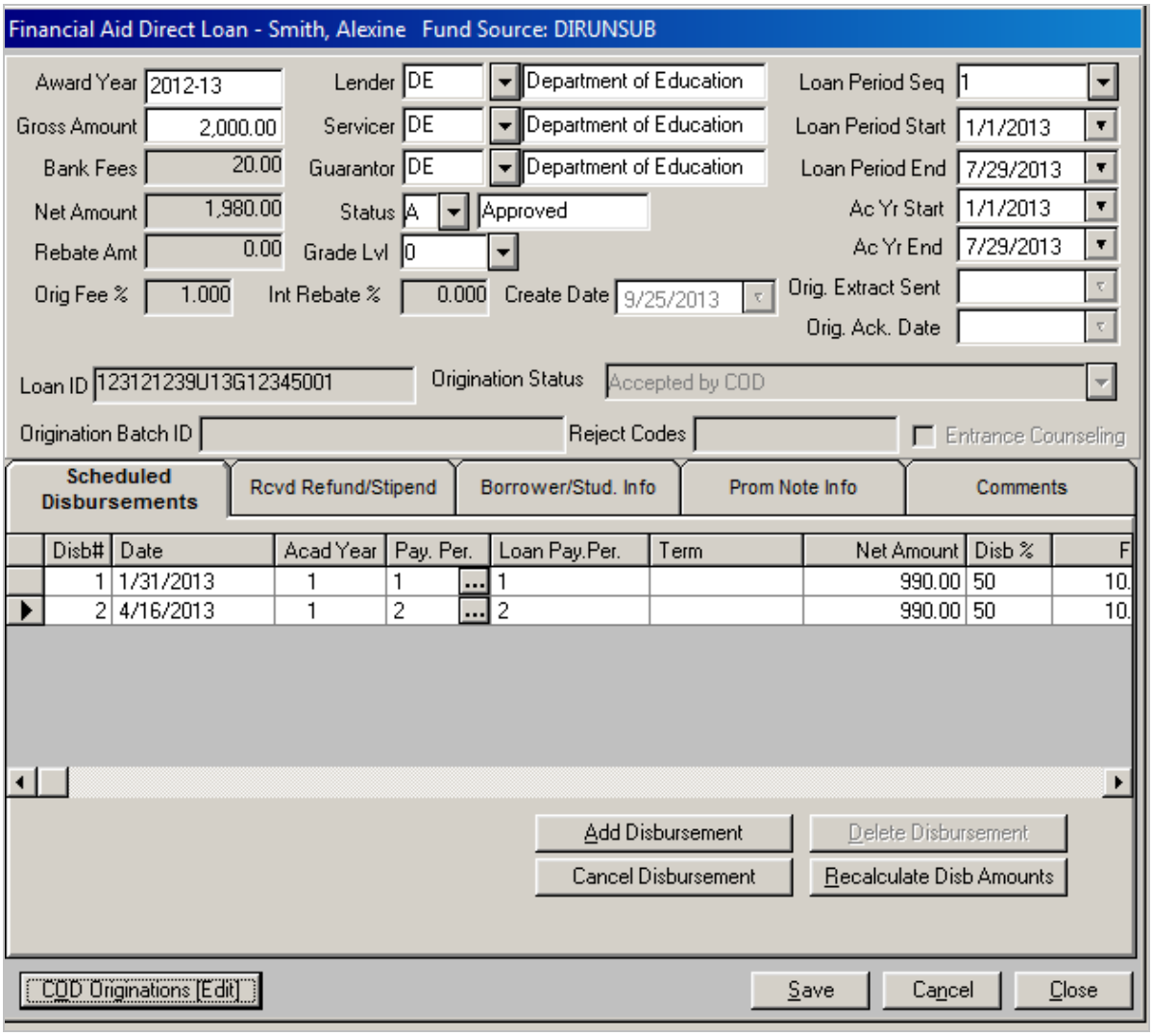
The COD Originations button displays the Edit Originations and View Originations options.



2. Select **View Originations**. The Origination Changes form displays any pending or sent origination changes. If no changes are found, a message stating so is displayed.
3. If you previously saved Origination Changes, they are displayed.

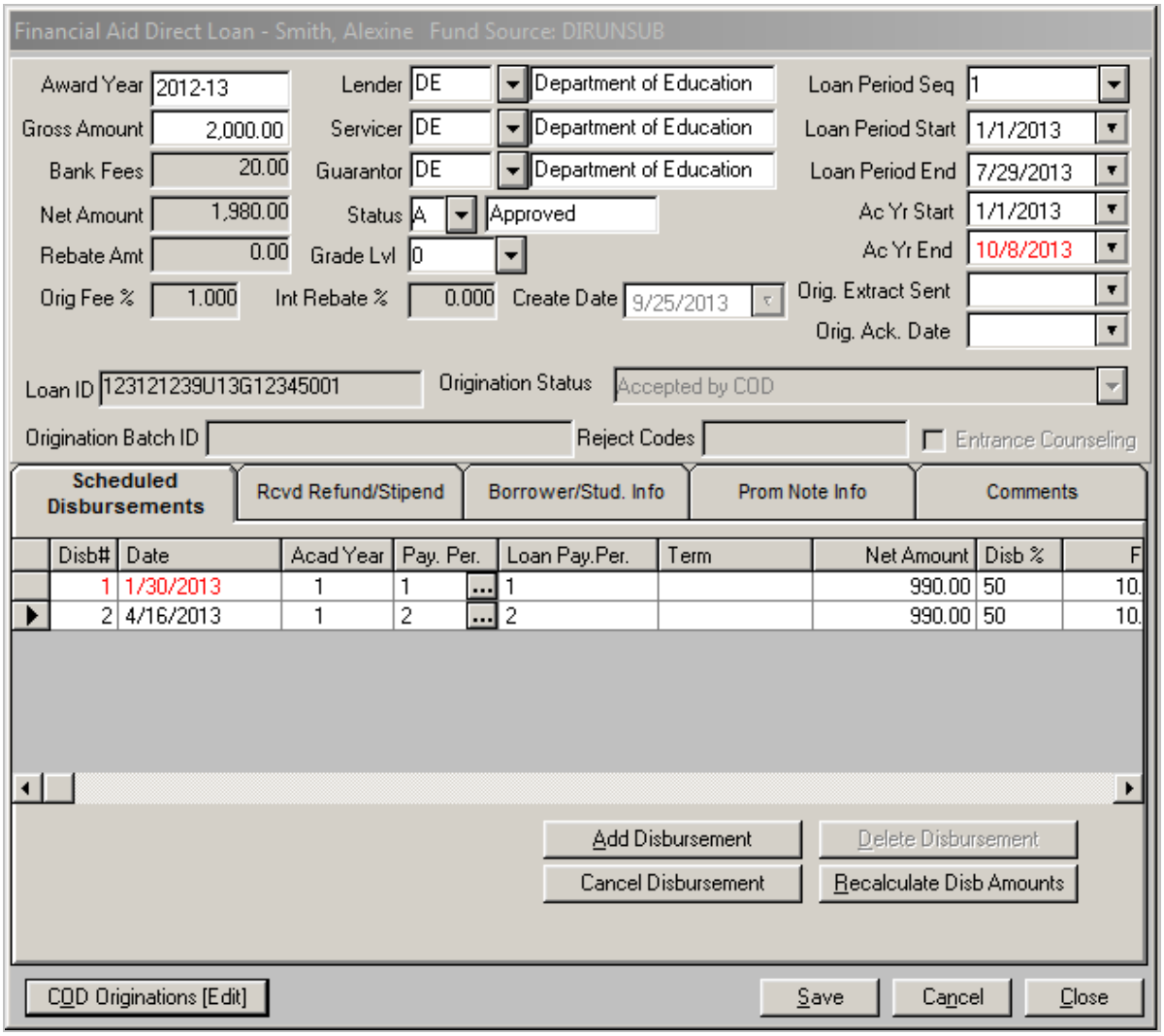


4. Click **Close** to close the form.
5. Click **Edit Originations**. You can edit any field or menu that is not dimmed.



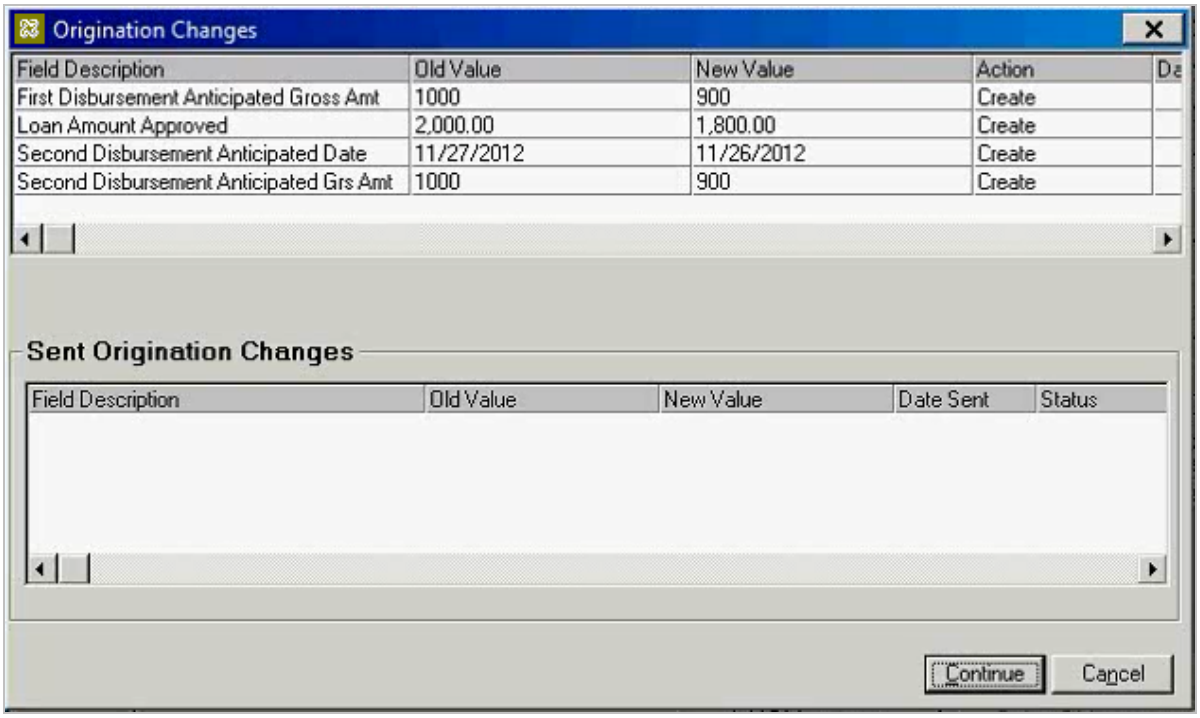
6. To edit a date, click a **Date** field, click ... and select a new Disbursement date.
7. Your changes appear in red until the Origination Change record is exported. Once the file is exported, the names of the fields that were changed will be red until the response file is imported.

   Note: For the Acad Year Start and End Dates to be enabled during the origination change process, for an Academic Calendar 5 & 6 that use Loan Periods, the student must be in a Permanent Out school status.

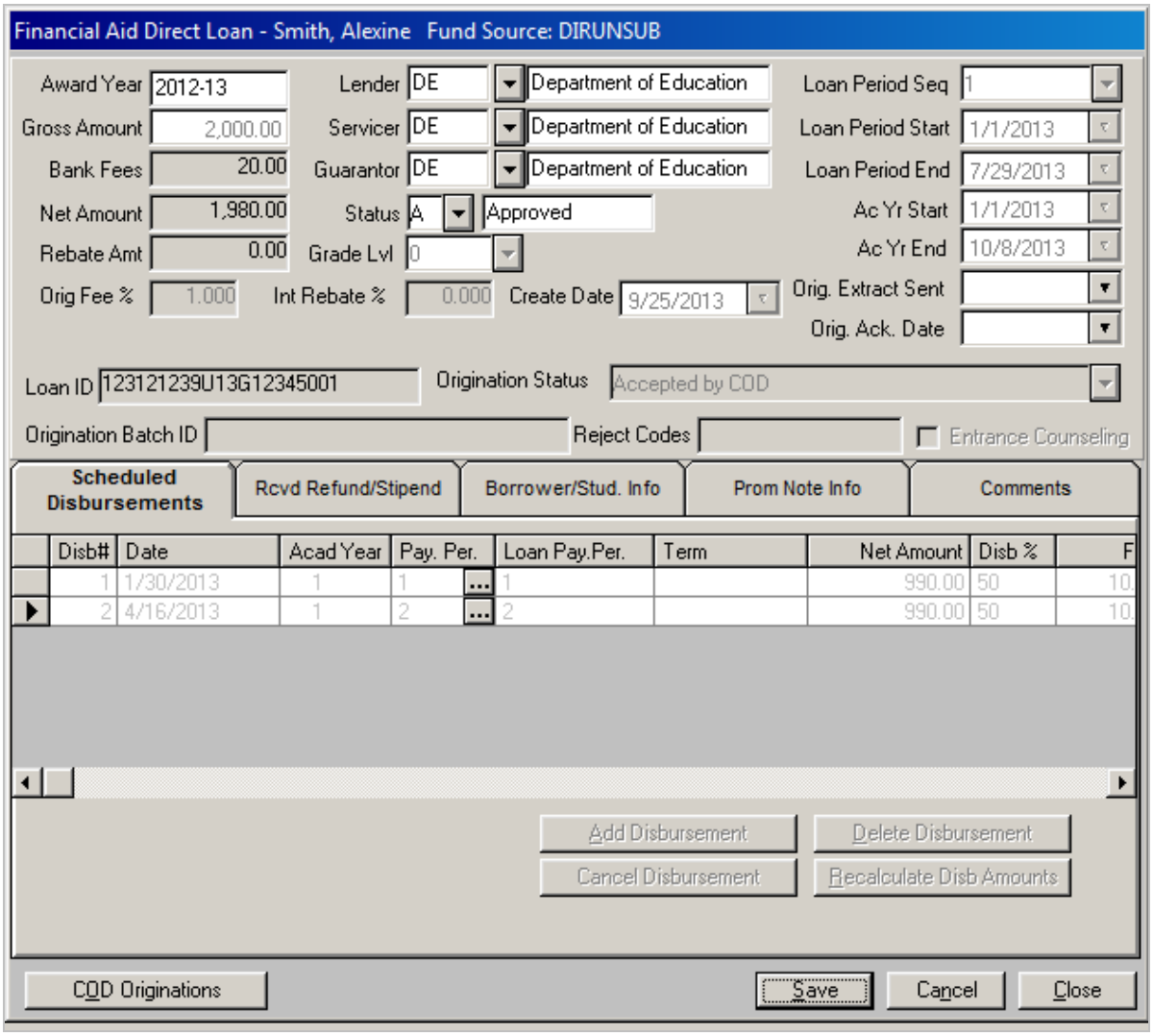


Note: When you mouse over a changed value, the old value is displayed.

8. Click **Save** to view the COD origination changes associated with your edits.



9. Click **Cancel** to close this form. Continue to make changes to the Federal Aid Direct Loan form.
10. Click **Continue** to save your changes. The Schedule Disbursement tab is refreshed with the new information, and the fields once again dimmed.



Each field is validated for correct input. CampusNexus Student updates the applicable tables with the changes.

When the file containing origination changes is sent to COD and approved, the changes are already be in place. If the file is rejected, the changes are rolled back by the COD Import feature, with the exception of the academic year dates and loan dates for loans with loan period sequences. The record will have to be modified again using this process.

Origination Changes Created by Academic Related Activities

For non-term institutions (Academic Calendars 5 and 6), CampusNexus Student can be configured to automatically create origination change records when any of the following dates are updated for a Direct Loan (DIRSUB, DIRUNSUB, and DIRPLUS) by Academic related activities, such as adding or removing transfer credits, and the Student Pace Evaluation (SPE) tool adjusting the loan dates due to changes on the student's schedule, etc.

- Academic Year (AY) start/end dates
- Loan Period (LP) start/end dates
- Disbursement dates

Origination changes are created automatically only for Direct Loans that have Origination Status of "Accepted" or "Batched to Send".

Consequently, corresponding origination changes for Direct Loans that are adjusted when a student's status is changed to "Canceled" (Never Attended) are automatically created in the system and exported to COD.

For more information about the configuration options for origination changes, see Direct Loan Setup.

Loan Information

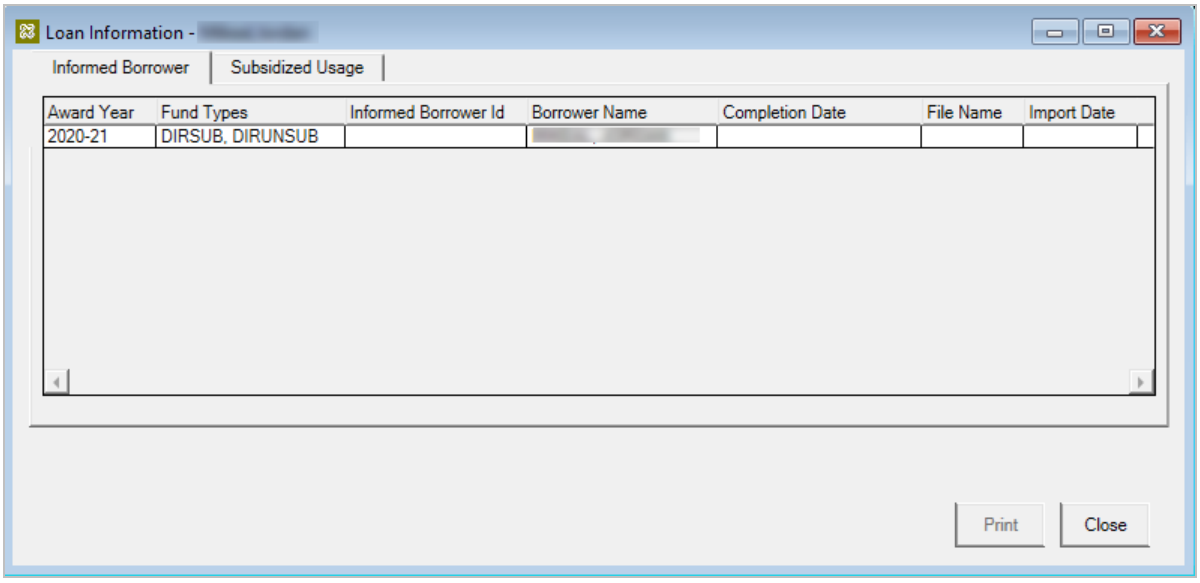
You can use the tabs on the Loan Information form to view and print a student's Informed Borrower status and Subsidized Usage information.

Informed Borrower Tab

Use the Informed Borrower tab to check if borrowers have reviewed their outstanding loan balance at https://StudentAid.gov (Annual Student Loan Acknowledgement).

Beginning with the 2020-21 award year, CampusNexus Student supports the Informed Borrowing Requirement for student borrowers (DIRSUB, DIRUNSUB, DIR Grad Plus loans) and parent borrowers (DIR Parent Plus loans). After the borrowers acknowledge that they have reviewed their outstanding loan balance at https://StudentAid.gov (Annual Student Loan Acknowledgement), COD returns a new system generated response file (CRIB21OP) that contains the information populated on the screen below. For more information, see COD Updates in Regulatory Help.

1. Select a **Student**.
2. Navigate to **View** > **Financial Aid** and select **Loan Information**.
3. Click the **Informed Borrower** tab and review the data in the grid.



Field	Description
Award Year	The financial aid award year.
Fund Types	Specific classification for the fund source.
Informed Borrowing ID	After borrowers acknowledge that they have reviewed their outstanding loan balance at StudentAid.gov, COD returns 18-digit Informed Borrowing ID tags at Award Level for each Direct Loan in the response file.

Field	Description
Borrower Name	Borrower's last name and first name.
Completion Date	The date when the item was completed.
File Name	File name of the generated CRIB21OP file.
Import Date	The date and time when the job was processed

Subsidized Usage Tab

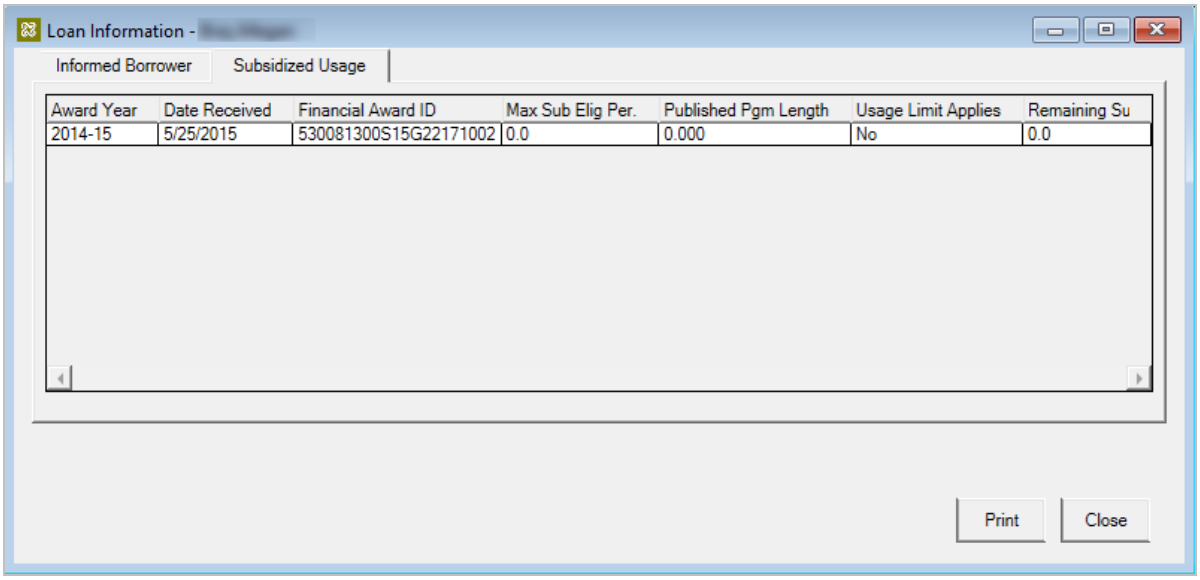
The records in the Subsidized Usage tab indicate if a student has a remaining subsidized loan eligibility for a specific award year. The form assists financial aid administrator when packaging student loans.

When a Direct Loan is exported from CampusNexus Student to the Common Origination and Disbursement (COD) system, COD returns a response that contains the subsidized usage information.

COD uses the following formula to determine the remaining subsidized loan eligibility:

Maximum Eligibility Period - All Subsidized Usage Periods = Remaining Eligibility Periods

1. Select a **Student**.
2. Navigate to **View** > **Financial Aid** and select **Loan Information**.
3. Click the **Subsidized Usage** tab and review the data in the grid.
4. Review the information for the pertinent award year. In particular, check whether the subsidized usage limit (SULA) applies and take note of the Remaining Subsidized Eligibility Period.



Field	Description
Award Year	The financial aid award year.
Date Received	The date when the COD response containing the subsidized usage information was imported into CampusNexus Student and the record displayed in the UI was created.
Financial Aid Award ID	The Financial Award ID matches the Loan ID on the Direct Loan Detail form.
Max Sub Eligibility Per.	The student's maximum subsidized loan eligibility period (in years).
Published Pgm Length	The program length (in years) published in the institution's catalog.
Usage Limit Applies	Indicates whether the subsidized usage limit applies (Yes/No).
Remaining Sub Eligibility Period	The calculated remaining subsidized loan eligibility (in years).

Academic Year Form

The Academic Year form is part of the Financial Aid Packaging Process, enabling you to add or edit an academic year record for the student. See also Start the Packaging Process, Comment tab, Budget tab, Packaging Status, Award Notices, Packaging, and Field Level Security.

Note: When you save any date changes on the Academic Year form, you can also update the dates on the Direct Loan form if you have Fund Source Permissions. If you do not have Fund Source Permissions, the changes are not carried over to the Direct Loan form.

Academic year sequences are generally built from the Program Version setup; however, program versions using Academic Calendars 5 and 6 have logic to alter the number of sequences and their credits or hours and weeks values based on Transfer Credits and prior course work from other enrollments. Other criteria that can alter the values and number of sequences needed are CLEP course work, associated course work, and course work prior to the program version start date.

If an action occurs that triggers a re-evaluation of Academic Year (AY) and Loan Period (LP) sequences for a non-term program version and a system constraint is encountered that prevents CampusNexus Student from adjusting the AY / LP sequences, a message indicates that the Academic Year and Loan Period sequences could not be adjusted automatically. System constraints include Completed / Locked or Fully Disbursed AY / LP's, and CampusNexus Student trying to remove a sequence that has Financial Aid packaged. Review the sequences and adjust them as needed.

When CampusNexus Student is configured to 'Disallow Rolling Credits' under Setup > Student Pace Evaluation Settings, it can also adjust the final academic year and loan period sequences if extra credits or hours are earned within previous sequences.

Note: If the value in the Start Date, End Date, or Dependency Status field is displayed in red, a pending origination change for a loan associated with the academic year is being displayed.

When academic years are added, CampusNexus Student determines if the student has an ISIR or FAFSA for same award year, and if the student's grade level is '1st year never attended college', the academic year Sequence 1 is flagged as 'First Time Borrower'. See also Grade Level and First Time Borrowers settings.

If there are no academic years for the enrollment, CampusNexus Student first tries to add the academic years as defined in Lists > Financial Aid > Programs. If none are found, add an academic year manually. If there already are academic years in the list for the enrollment, click **Add** to open a new academic year for the list.

Note: The ISIR Summary Report, ISIR Import Report, Print ISIR Batches Report, Review/Print Multiple Print Batches, and Print Individual ISIR reports selections now include 2014-15 in the Academic Year (AY) menu list.

The NSLDS Subsidized Loan Eligibility Used Field (position 445) provides the total time during which the student has received Direct Subsidized Loans as of the date of the ISIR; it does not include the total time during which the student has received Direct Subsidized Loans while enrolled in a non-credential teacher certification program. In general, applicants may not receive Direct Subsidized Loans for more than 150% of the published length of the program in which they are currently enrolled. This field contains numeric six-digit values, 000v000 to 999v999, where v is an implied decimal and is excluded from the output.

Special Program Indicators A and B are now available to ensure that institutions can supply of Published Program length of 4 years . For purposes of the 150% limit, a bachelor's degree completion program is a bachelor's degree program that requires an associate degree or the successful completion of at least two years of post secondary coursework as a prerequisite for admission to the program. Because these programs only offer the final two years of coursework necessary to confer a bachelor's degree, the programs have a published length of 2 years.

For more information on the use of Special Program Indicators, see: https://ifap.ed.gov/eannouncements/011714RevisedFinalRegulationsPublished150PercentEANum8.html

On July 6, 2012, Public Law 112-141 was enacted. This law contains a provision that eliminates the subsidy on Direct Subsidized Stafford Loans when a “first time borrower” enrollment exceeds 150% of the published program length.

For award years 2014-15 and higher, the Subsidized Usage Limit Applies (SULA) flag (where the valid values are Y or N) has been added to the COD system. Upon receipt of a Direct Loan actual disbursement with a first disbursement date on or after July 1, 2013, COD determines if the borrower meets the definition of a "first time borrower" to confirm that the 150% subsidy limit applies to the borrower.

When the SULA flag is set to Y, a SAR comment code 267 will appear if a first time borrower student is subject to the subsidized loan limitation. The message directs users to the studentaid.gov site. This flag is viewed for all academic years but is only populated for the current award year. When the ISIR is received and the SULA flag is associated with a comment code, document triggers associated with the comment code are activated. The SULA flag is also displayed in the Financial Aid Packaging form.

Title IV Eligibility

Payment periods that the student will not attend are flagged to indicate that the student is not eligible for TIV funds during that payment period since the student will be unable to establish eligibility for TIV funds.

The 'notEligibleforT4' flag is set to 1 for the following scenarios:

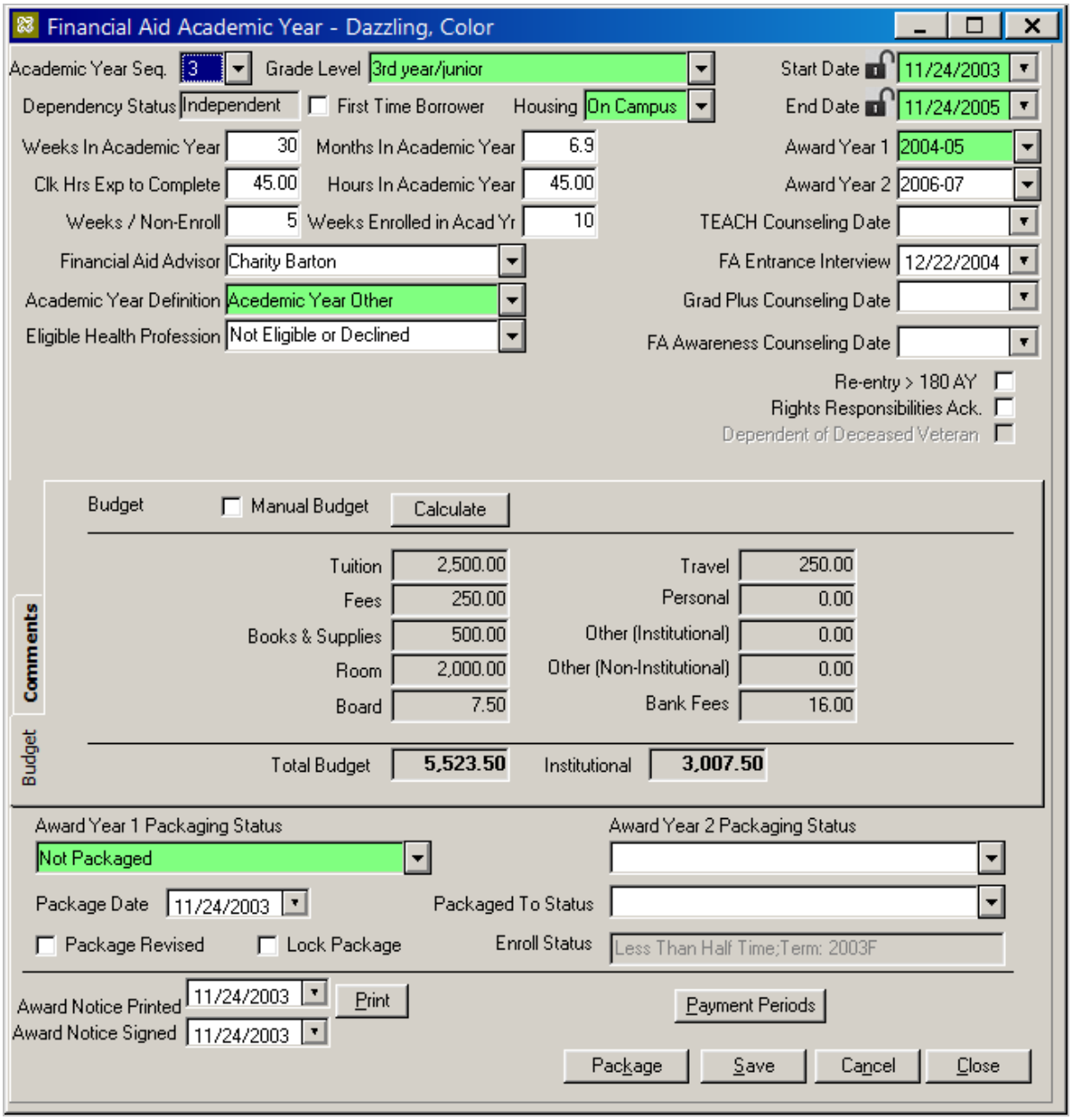
- A final non-zero credit payment period occurs with a credits milestone that is the same as a prior payment period (i.e., the student registered enough credits to complete the program version in the payment period prior to the final payment period). Use cases are AY/LP having 1 or 2 payment periods. Disallow rolling credits is disabled to create this data pattern for a final AY/LP with a single payment period.
- A zero credit payment period can occur when the flag to allow adjustment to 0 is enabled. See Allow zero out extra AY/LP under Setup > Campus Information > Financial Aid (tab). Extra payment periods that are unneeded but cannot be removed due to constraints are updated to have 0 credits/hours.

When the flag is set to 1, the Payment Periods for Academic Year form displays the message: *"The system has calculated that the student will complete the program prior to this payment period. The student is not eligible for the TIV funds associated to this payment period."*

You can configure an alert for a staff member when a payment period is flagged non-eligible for Title IV funds. For more information, see TIV Eligibility Alert under Setup > Campus Information > Financial Aid (tab).

Designing a Financial Aid Package:

1. Select a student.
2. Navigate to **View > Financial Aid > Packaging**. The Financial Aid Packaging form is displayed.
3. Click **Add** to add a new academic year record for the student, or select an academic year option and click **Edit**. The Financial Aid Academic Year form is displayed.



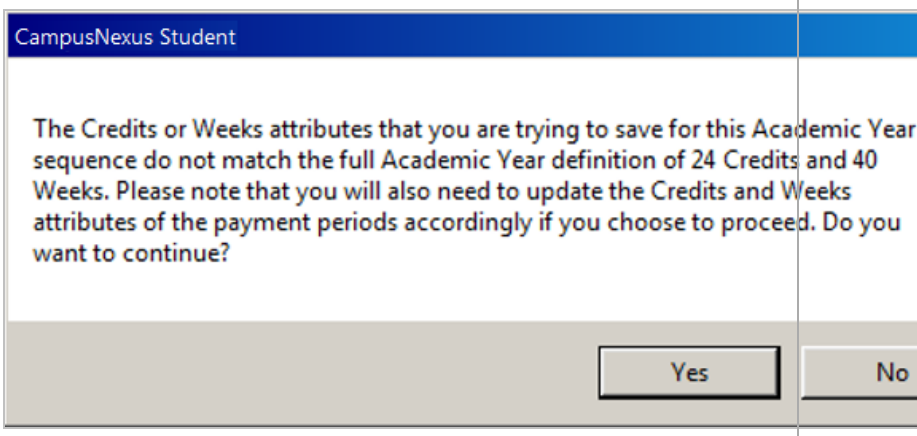
4. If there are no academic years for the enrollment, CampusNexus Student tries to add the academic years as defined in Lists > Financial Aid > Programs. If none are found, you add an academic year manually. If there already are academic years in the list for the enrollment, click **Add** to open a new academic year for the list.
5. Complete the fields on this form as needed.

Field Descriptions

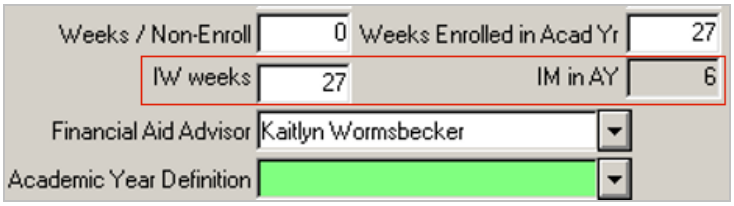
Field	Description
Academic Year Seq	Indicates the Academic Year record with which you are working. You can change from one academic year to another by selecting it in this list box. When you delete an academic year from the student Packaging form, CampusNexus Student renumbers the remaining academic years. In other words, if a student has academic years 1, 2, 3, and 4 and academic year 2 is deleted, year 3 is renumbered to year 2 and year 4 is renumbered to year 3. This also updates the following tables is the database: • FaStudentAY • AdEnrollSched • FaRefund • SaBillingBatchDetail • SaEnrollRevenue • SaRefundCalc • SaRevenueDetail • SaTrans
Grade Level	Select the grade level at which the student is working in this academic year. Grade levels are defined under Lists > Academic Records > Grade Level. **Notes**: • A student must be assigned a 'graduate' grade level to qualify for a Graduate PLUS loan. • The grade level options used here do not necessarily correspond to the options on the FAFSA or the Stafford Loan forms. The grade levels can be modified.
Dependency Status	This read-only field indicates the FA model that is being used for the selected student, in other words, Dependent or Independent. **Note**: If a student does not have a FAFSA or ISIR on file and has an Undetermined dependency status, you can assign the student with a Dependent status when packaging Direct Parent PLUS Loans. In this scenario the dependency status will be Dependent*.
First Time Borrower	Select this option if the student is a first time borrower, and you want to delay the first loan disbursement by the number of days entered in Financial Aid Settings.
Housing	Select On Campus, Off Campus, or With Parents. For more details on Housing Status, refer to Budgets Codes-Financial Aid Housing Status.

Field	Description
Start Date	Enter the start date of the academic year. For the first academic year, CampusNexus Student defaults to the start date in the student's enrollment record. The start date of the student's second and succeeding academic years are estimated using the number of weeks in an academic year and the number of weeks not enrolled. You can change the estimated date if necessary.
End Date	Enter the end date of the academic year. For the first academic year, CampusNexus Student defaults to a date calculated from the student's enrollment date plus the number of weeks in the academic year. The end date of the student's second and subsequent academic years are estimated using the number of weeks in an academic year and the number of weeks not enrolled. You can change the estimated date if necessary.
Locking/Unlocking the Start Date and End Date 	If Exclude from Auto Adjustment permissions are configured for you on the Staff Information form, click the lock image to toggle between the Lock and Unlock states, as follows: Unlock : Allow this date to be adjusted by Student Pace Evaluation (SPE) Lock : Exclude this date from Auto Adjustment If you try to unlock an academic year, CampusNexus Student checks if any subsequent academic years are locked. If subsequent academic years are locked/excluded, the following message is displayed: *"Subsequent Academic Years and Payment Periods are excluded from auto adjustments. To include this academic year in auto adjustment, must also include all the subsequent Academic Years and Payment Periods in auto adjustment. Do you want to continue?"* Select **Yes** to unlock all subsequent payment periods and academic years. Select **No** to do nothing and return to the form.
Award Year 1	Select the first award year in this academic year.
Award Year 2	Select the second award year in this academic year. Award year 2 is optional at this time. CampusNexus Student only requires that a FAFSA be completed for the first award year to package an academic year.

Field	Description
Weeks in Academic Year	Enter the number of weeks in the academic year (AY). The default for this value comes from the AY defined for the student's program in Lists > Financial Aid > Academic Years. This field represents the number of weeks that the student should attend for the selected AY sequence. Any sequence prior to the final AY sequence should be set using the weeks defined for a full AY. In a non-term configuration, the weeks in a final AY can change from the definition configured on the program version based on student need. When student need changes, the weeks of the final AY are pro-rated based on the number of credits needed in the final AY and a ratio of credits to weeks from the definition of a full AY. *Example* If a student needs 14 credits in the final AY, and the definition of a full AY is 24 credits/30 weeks, CampusNexus Student calculates as follows: 30/24 * 14 = 17.5 (rounded up to 18 weeks) When you edit this field for a program version configured to use Academic Calendar 5 or 6, CampusNexus Student displays the attribute warning message. The message warns you if you try to manually edit and save values that would not match the values CampusNexus Student determined are needed.
Months in Academic Year	The number of months in the academic year is calculated from the Weeks in Academic Year field in Lists > Financial Aid > Academic Years Code Setup. CampusNexus Student calculates a 36-week Academic Year as 8 months, when the institution looks at a 36-week AY as 9 months. CampusNexus Student calculates this based on 4.33 weeks per month. Some institutions assume it should be 4.00. To resolve this issue, the calculation is left at 4.33, but holidays are added to the calculation of the academic year end date. CampusNexus Student checks the calendar file and extends the end date of the academic year based on this schedule.
Credits Expected to Complete	Enter the number of credits the student is expected to complete in this academic year. The default for this value comes from the academic year defined for the student's program in Lists > Financial Aid > Programs.

Field	Description
Credits in Academic Year	Enter the number of credits in the academic year (AY). The default for this value comes from the AY defined in Lists > Financial Aid > Academic Years. This field represents the number of credits that the student should attend for the specific AY sequence that is selected. Any sequence prior to the final should be set using the credits defined for a full AY. In a non-term configuration, the credits in a final AY can change from the definition configured on the program version based on student need. *Example*: A student transfers 10 credits. The credit transfer reduces the amount of credits needed to complete the program version requirements. The final AY credits are reduced by 10. When you edit this field for a program version configured to use Academic Calendar 5 or 6, CampusNexus Student displays the attribute warning message. The message warns you if you try to manually edit and save values that would not match the values CampusNexus Student determines are needed. CampusNexus Student can calculate the value of the "Credits in Academic Year" field for the final AY based on the remaining credits needed. **Attribute warning message** 
Weeks/Non Enroll	Enter the number of weeks in the academic year that the student is not expected to be in attendance. The total of Weeks in A/Y and Weeks Non-Enroll should add up to 52. This number is used to estimate the time between the start of one academic year and the start of the next academic year.

Field	Description
Weeks Enrolled in Academic Year	Enter the number of weeks for which the student is enrolled in the academic year. If the Pell record has already been originated (RFMS), and you change the **Weeks Enrolled in AY**, you are prompted to change the origination status to **R**.
TEACH Counseling Date	When importing TEACH Grant acknowledgment message class CRACYYOP, this field is automatically updated. This field may also manually be updated.

Field	Description
IW weeks and IM in AY	IW weeks and IM in AY are conditional fields that are enabled when the program version is configured to "Auto recalculate budgets" (see Lists > Financial Aid > Programs > Program Version). When the program version for the enrollment has "Auto recalculate budgets" selected in conjunction with the budget assigned to the Academic Year configured to "Use Monthly Amounts" and the Institutional Charges Calculation Method is set to "Use Amounts Entered Here", CampusNexus Student can automatically recalculate budget amounts based on instructional weeks (IW) that occur between the Academic Year and Loan Period dates. The amounts on the budget are multiplied by the value contained in the "IW Months" field to populate values in the budget section of the Academic Year. The IW months field is used to calculate the Monthly amounts instead of the Months in AY field. The COA and Pell COA are updated as the result of the automatic budget recalculation.  **IW weeks** This field which represents the number of instructional weeks (IW) that occur within the date range of the Academic Year (AY) dates. The field is populated/updated by a system calculation if "Auto Recalculate Budgets" is enabled for the program version. The field is used by CampusNexus Student to calculate the IW months value for the AY sequence. The minimum value of the field should never be less than the “Weeks in AY” field; however, it could be calculated to a value that is greater for certain course registration patterns. The number of IW could differ from the calendar weeks of the same time frame. If projection is used to calculate the week milestone and the credits milestone is the same date, the value should not be greater than the “Weeks in AY” value. (A similar field is contained on the Loan Period form and used for calculations on that form). **IM in AY** This field represents the number of instructional months (IM) that occur between the dates of the Academic Year (AY). This field is populated by a system calculation that divides the value of the "IW in AY" field by 4.333. If the resulting value contains a decimal of .5 or higher, the months are rounded up, else the months are rounded

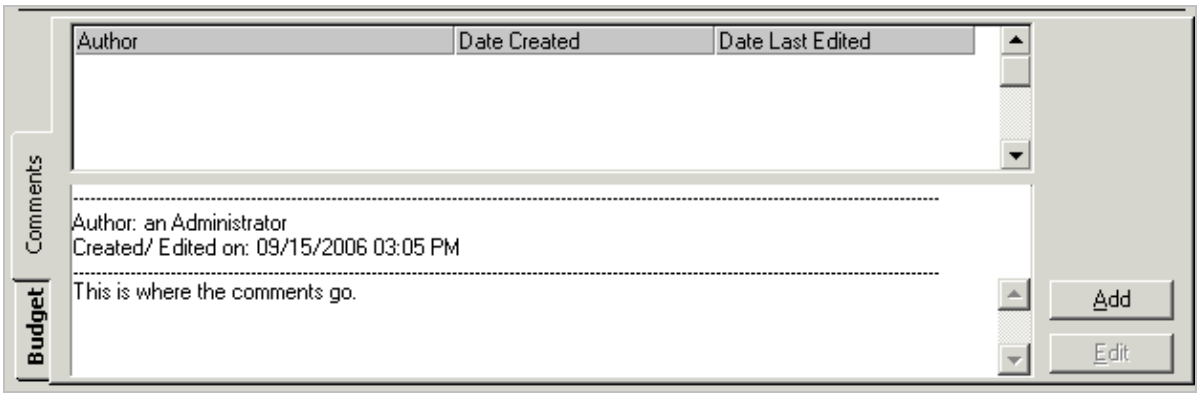
Field	Description
	down. The "IW Months" value is used in budget calculations when "Auto recalculate budgets" is selected for the program version. (A similar field is contained on the Loan Period form and used for calculations on that form).
Financial Aid Advisor	Select the student's Financial Aid Advisor. The FA Advisor may be selected during the enrollment process if your institution is set up to do so. See Setup > Academic Records > Enrollment.
Academic Year Definition	Select an academic year. Academic Years are set up under Lists > Financial Aid > Academic Years.
FA Entrance Interview	The FA Entrance Interview date field can be populated by any of the following methods: • By importing the Direct Loan Entrance Counseling File (Refer to number 3) or Direct Loan Plus Application Acknowledgment. • By selecting the Entrance Interview Document on the campus setup, when the document has been added to the student's document folder and the document status has a document status code of one of the following: "OK", "REC", "RECVD", "RECEIVED", "REC'VD", "A" and is associated with an 'Approved/On file' status, the entrance interview date within this form will be set to the date that the document was received. • By manually editing the date on this form.
Graduate Plus Counseling Date	This field represents the Direct Loan Graduate Plus Entrance Counseling Date. The date is entered by a Financial Aid Officer, or the date is imported from the Direct Loan Counseling file, populated as the value of "P" (Graduate Plus). The date is populated only when the existing contents are null. The field can be populated by any of the following methods: • By importing the Direct Loan Counseling file. • By manually editing the date on this form.
Financial Aid Awareness Counseling Date	The field represents the date the student completed Financial Awareness Counseling on the https://studentloans.gov website. The field can be populated by any of the following methods: • Importing the Direct Loan Entrance Counseling Acknowledgment file (CRECMYOP). • By manually editing the date on the form.

Field	Description
Rights Responsibilities Ack	If you import the Entrance Counseling results, the value of the student's rights and responsibilities Acknowledgment flag contained in the file is set in this field.
Re-entry > 180 AY	This check box is used by the Student Pace Evaluation (SPE) tool in non-term configurations when a student is re-entered after the student has been out of school for more than 180 days. When the Re-entry button is clicked on the enrollment form, CampusNexus Student checks if the re-entry date selected is more than 180 days from the NSLDS withdrawal date. If greater than 180 days, CampusNexus Student finds the first available AY sequence without financial aid packaged (Estimated or Approved) and set its Start Date to the Re-entry Date. CampusNexus Student then selects the Re-entry > 180 AY check box, which will be used as the starting point for the SPE tool to monitor the student's progress through the remaining time in the program.
Dependent of Deceased Veteran	Authorized users can select this check box to indicate that a student is the dependent of a veteran that perished in Iraq or Afghanistan after September 11, 2001. This check box is selected for academic years with award years 2009-10 or beyond. By default, the check box is cleared. During the ISIR import process for the 2011-12 award year and forward, if a student has a "DOD Match Flag" on their ISIR record, the student is updated automatically with the "Dependent of Deceased Veteran" option selected on the student's Academic Year form. This is applicable for automatic ISIR matching, as well as manual matching. **Note**: If this option is selected, eligible students receive the maximum Pell award as well as all Title IV aid based on a zero EFC. Additionally, eligible students may also qualify for an Iraq and Afghanistan Service Grant (IASG).
Exclude Summer Term from Packaging	Use this option to include or exclude the Summer Term in Financial Aid packaging. This option is only visible and applies to students who are enrolled in a Program version with a Summer Header or Trailer, and who have selected the Use Summer Term in Packaging option. By default, students are included in Summer Term packaging if the program version is chosen to package for the summer; students can then choose to be excluded from summer packaging. When this option is not selected, the Packaging process packages aid for Summer. This option on the Financial Aid Academic Year form overrides the option on the Student Program Version, but this applies only when the Program version is configured to package for the summer.

Field	Description
Eligible Health Profession (HPPA Level)	This list takes into account the two levels of additional awarding available to eligible graduate/professional students enrolled in Health Profession programs. This option can take on one of the following values: • Not Eligible or Declined • Eligible for up to $16,667 in additional Stafford loan (HPPA Level 1; applies to CIP Codes 42.0201; 51.0101; 51.0701; 51.2001; 51.2201) • Eligible for up to $26,667 in additional Stafford loan (HPPA Level 2; applies to CIP Codes 51.0401; 51.1201; 51.1701; 51.1901; 51.2101; 51.2401; 51.33; 51.3303) Based on the CIP Code that is assigned to the Area of Study, Program Version or Program, the default value for the Health Professions option is set when a new Student Academic Year is created via new enrollment in CampusNexus Student or via the CampusLink API, or upon completing the academic year sequence on the Academic Year form. If you choose not to use CIP Codes, the value for this field can be manually selected on the Academic Year form. The maximum amounts are for 12-month academic years and will be prorated for 11-, 10- and 9-month years. Only graduate/professional grade level students are eligible for the higher amounts.

Field	Description
PLUS Credit Decision	This list is displayed only when the following conditions are satisfied: • Student Financial Aid Awarding is enabled (Daily > Automated Processes > Configuration > Process Activation) • Dependency Status of the student is dependent The PLUS Credit Decision box enables you to specify the credit decision status for PLUS loans for which the parents have applied. This enables a dependent student to replace the amount of a denied PLUS loan by borrowing additional unsubsidized loan amounts. You can select one of the following values: • A - Credit accepted • N - The credit decision has changed from Pending to Denied or Accepted • C - Credit overridden; new info provided • E - Credit overridden; endorser OK • D - Credit denied; endorser not OK • P - Pending The PLUS Credit Decision does not display a value, by default. A blank value indicates that a credit decision status has not been set. To clear a selected value, press the Delete key in the PLUS Credit Decision box. If a credit decision has been set and the award is packaged, the value in the PLUS Credit decision box is displayed in the Financial Aid Packaging form as a read-only field. To ensure direct PLUS loan disbursements are exported, you must ensure: The MPN Link Indicator is Y. AND The value selected in the Credit Decision Status field is A, E, or C.
Comments Tab	

Field	Description
Click the Comments tab to enter general Academic Year FA comments about the student's financial aid packaging. You can enter a maximum of 3,000 characters in this field. The Comments entered here are tracked by author, date, and time. The **Add** and **Edit** options are only available to authorized users.	



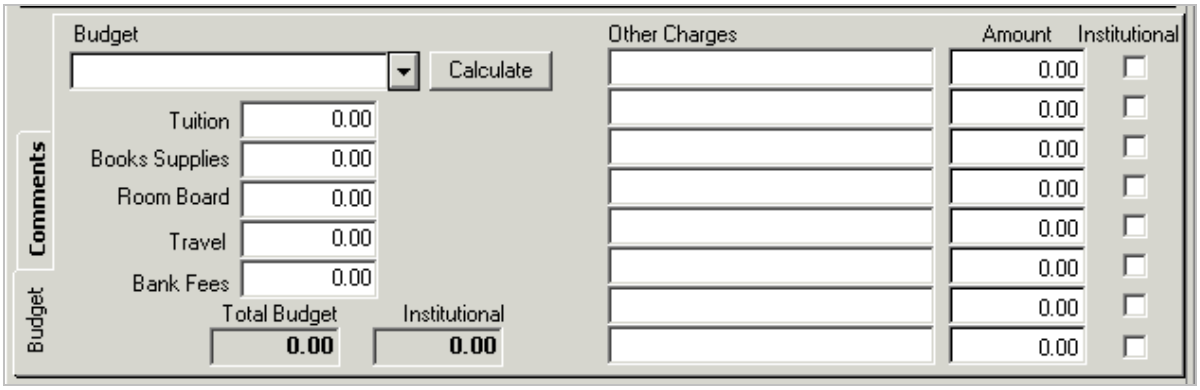
Budget Tab

Select the budget plan to be used in calculating the cost of attendance in this academic year from the list. Budget plans are set up under Lists > Financial Aid > Budgets. Budget information and changes for a student are captured and posted to the Financial Aid Audit folder along with the old and new values of the budget information, user's name and comments.

CampusNexus Student continues displaying a disabled budget's description on the Financial Aid Academic Year form as long as you do not try to view the list of available budgets.

If you activate the Budget list, the description field is cleared in preparation for a new selection. Since the list does not contain the disabled budget option, the budget description on the form remains blank. If you click **Save**, the previous description is no longer available. If you view the list of active budgets in the list, thus clearing the previous description, and then click **Cancel**, the previous description is restored.

Note: Even if the budget description is no longer available, the budget data that was previously selected is still a part of the student's FA record. **It is recommended that you disable budgets with extreme care**.



Field	Description
Calculate (button)	Click **Calculate** to calculate the total cost of attendance from the budget data entered on this form. If the program version is configured to Auto Recalculate Budgets based on Instructional Weeks (IW), a manual recalculation uses the values in the 'IW week's and 'IM in AY' fields.
Total Budget	This read-only field displays the amount of the budget components. It is the calculated total cost of attendance for this academic year.
Institutional (Amount)	This read-only field indicates the portion of the budget that is composed of institutional charges. Tuition is an example of an institutional charge. Travel is not an institutional charge (it is an allowance budgeted for FA packaging purposes). See the topic on FA Budget code setup for more about institutional charge definition.
Tuition	Enter the tuition for this academic year. This number usually comes from the budget you select for this academic year. If a fee schedule is entered for the student's enrollment, the default tuition is the Tuition value in the fee schedule. Set up a student's fee schedule under View > Academic Records > Fees.
Books and Supplies	Enter the books and supplies budget for this academic year. This number usually comes from the budget you select for this academic year. If a fee schedule is entered for the student's enrollment, the books and supplies default to the value in the fee schedule (if any). Set up a student's fee schedule under View > Academic Records > Fees.
Room and Board	Enter the estimated room and board expense for the student for this academic year. This number usually comes from the budget you select for this academic year.
Travel	Enter the estimated travel expense for the student for this academic year. This number usually comes from the budget you select for this academic year.
Bank Fees	The value for this field is determined as follows: • If the FaAddBankFee flag is set to "Prompt User", you are asked *"Add bank fee to COA?"* when a new loan is saved. If you answer Yes, and the bank fee is greater than zero, the fee is added to the Bank Fees field. • If the FaAddBankFee flag is set to Yes, CampusNexus Student always adds bank fees to the cost of attendance. • If the FaAddBankFee flag is set to No, there is no change to the previous loan procedures. Bank fees are not automatically added to the cost of attendance. You can manually edit the bank fees field.

Field	Description
Other Charges	Enter a description and an amount for up to eight additional budget items. These numbers usually come from the budget you select for this academic year. **Note**: The amount cannot be a negative number. If you enter a negative number, CampusNexus Student displays a message indicating that Other Charges must be equal or greater than zero.
Institutional (check boxes)	For each of the Other Charges, select or clear the Institutional check box. Institutional charges are charges that are required by, and paid directly to, the institution. They are counted as revenue for the institution.
Packaging Status	
If the campus has a Packaging Status Promotion Method defined, the form shows only packaging statuses where "Allow Manual Change" is selected. In conjunction with the Automatic Document Scheduler feature, document schedules based on "Enrollment" are evaluated when the FA Packaging Status for a student is modified and saved. If the student's data matches the specified criteria for a document schedule where the criteria includes FA packaging status, all documents attached to the document schedule that are not already scheduled are scheduled for the student. The Packaging Status for the student is captured and posted to the Financial Aid Audit Folder when selected or changed. Depending on when a student enrolls into a program, there are situations when a student could be submitting Financial Aid documents as it relates to both Award Year 1 and Award Year 2 simultaneously within one Academic Year. (crossover students). Institutions can track a student's progression for both Award Year 1 and Award Year 2 simultaneously. CampusNexus Student can have two separate award year packaging statuses for students progressing at the same time. When using the Packaging Status Promotion feature for crossover students, the Financial Aid advisor can easily determine the Packaging Status for both award years within the same academic year.	
Award Year 1 Packaging Status	Select a packaging status for this student. Packaging status options are set up under Lists > Financial Aid > Packaging Statuses.
Award Year 2 Packaging Status	If a student starts in the middle of an academic year, the financial aid packaging crosses over into Award Year 2. Select a packaging status for this student here. When you have chosen a year for Award Year 2, the Award Year 2 Packaging Status field is enabled and disabled as the year is removed.
Packaged to Status	The Packaged To Status field assist institutions with the evaluation of aid that needs to be adjusted. Packaged To Status options are 3/4 Time, Full Time, Half Time, and Less Than Half Time. CampusNexus Student evaluates the term by comparing the packaged Enrollment Status with the current Enrollment Status and identifies discrepancies.
Package Date	Enter the date when the student's financial aid package for this academic year was prepared.

Field	Description
Package Revised	Select this check box if the initial financial aid package for this academic year has been revised.
Enroll Status	A student's enrollment status after the add/drop period determines if a student is eligible to receive the federal aid that was packaged for the current term. If a student has registered for a course, but never attends that course, institutions may still charge the student for the course, but may need to reduce federal aid. **Note**: Use the Packaged Enrollment Status report to determine if an adjustment is needed for a student.
Award Notices	
The Truth in Lending Act in Title I of the Consumer Credit Protection Act requires clear disclosure of key terms of the lending arrangement and all costs. For institutions, these regulations do not apply to lenders of student loans. Truth in Lending information must be printed on Award Notices. For details, please refer to Packaging - Truth_in_Lending. The Award Letters may be printed in a Batch Mode at a later time by clicking on the **Queue** button. See Print Award Letters in a Batch Mode for additional information.	
Award Notice Printed	Enter the date on which the Award Notice for this academic year was printed.

Field	Description
Print (button)	Click **Print** to open Microsoft Word and print the summary award letter or the detailed award letter for this academic year. When you click Print, the bottom of the screen changes to display the **Select Award Letter** frame. Select an award letter. Click Print to print the selected letter. If you click the Print button and try to print an award letter that has already been queued, CampusNexus Student displays the message: *"An entry exists in the queue for this award letter. Remove the Queued Request upon printing?"*. When the form gathers its record set to load data, CampusNexus Student includes the Fa Award Letter value from SyRegistry. • If the value is false, there is no change in the previous procedures. • If the value is true, CampusNexus Student displays your list of award letter reports. You can then select the correct report file to edit, call Crystal Reports, and run the report for the selected file. If there is more than one award year letter, you are prompted to select which award year to print the report for. When printing of the award letter is completed, the "Award Notice Printed" date field is populated. **Award Letters**: A generic Award Letter is provided in Crystal Reports to be selected when an institution defines the award letter selection as a Crystal Report. A condition in Setup determines if the award letter selection is based on Academic Year or Award Year. This option indicates which variables to send to Crystal when formatting the award letter. If an institution is set up to use a Crystal report award letter by Academic Year, the "Select Award Letter" list includes all report files with the following naming convention: `lst_FaAwardLetterByAcadYear.rpt`.
Award Notice Signed	Enter the date on which the award letter was signed by the student. See also Print Queued Award Letters in Batch Mode.
Payment Periods (button)	Click this button to display the Payment Periods for Academic Year form. For more information, see Payment Periods.

6. Click the **Package** button. If everything is accurate and complete on this form, the student's FAFSA has been completed, and the EFC has been calculated, CampusNexus Student displays the Packaging form for this academic year.
7. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Payment Periods

CampusNexus Student applies the following general rules that when creating payment periods:

- When initially creating academic years and payment periods, CampusNexus Student uses instructional weeks to determine the actual dates based on the weeks attribute.
- The Start Date for sequence 1 of a payment period sets the start date for the instructional weeks block for the enrollment.
- The initial payment period Start Date is aligned with the Program Version's Start Date.

Rules for subsequent payment period start dates:

CampusNexus Student sets the Start Date to the day after the prior payment period's End Date in either of the following cases:

- If the first course in the subsequent payment period starts before the end date of the prior payment period.

  - OR -

- If there are any credits or hours carried over from the prior payment period.

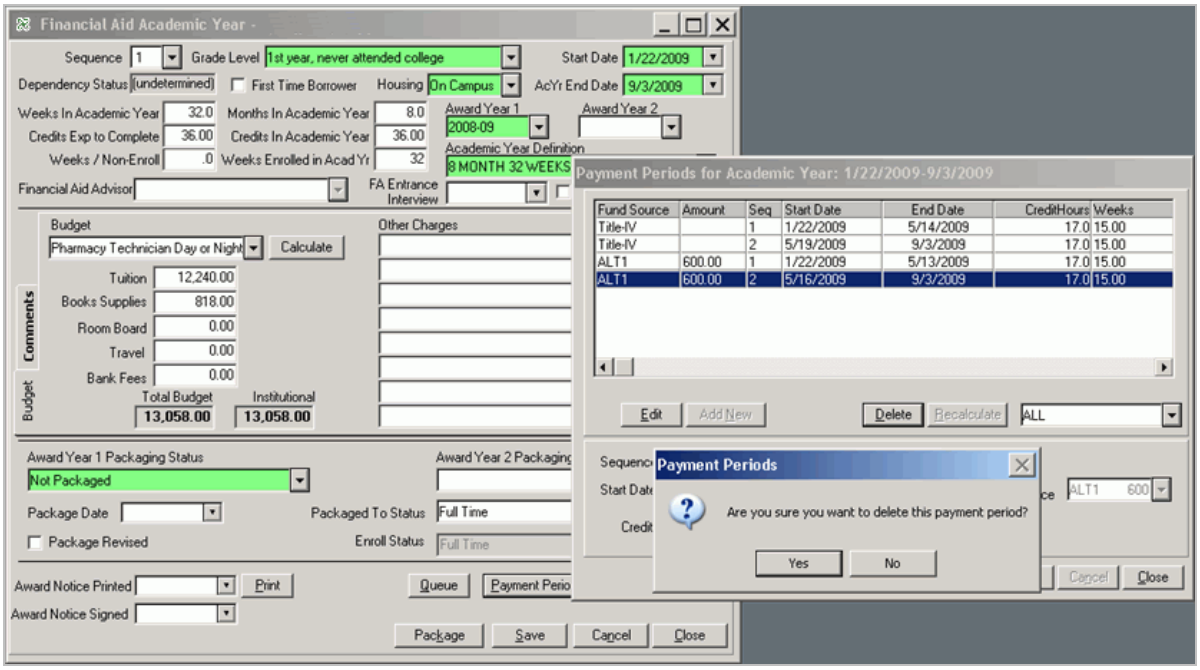
If these conditions are not met, CampusNexus Student sets the start date to the next course's start date.

Rules for payment period end dates:

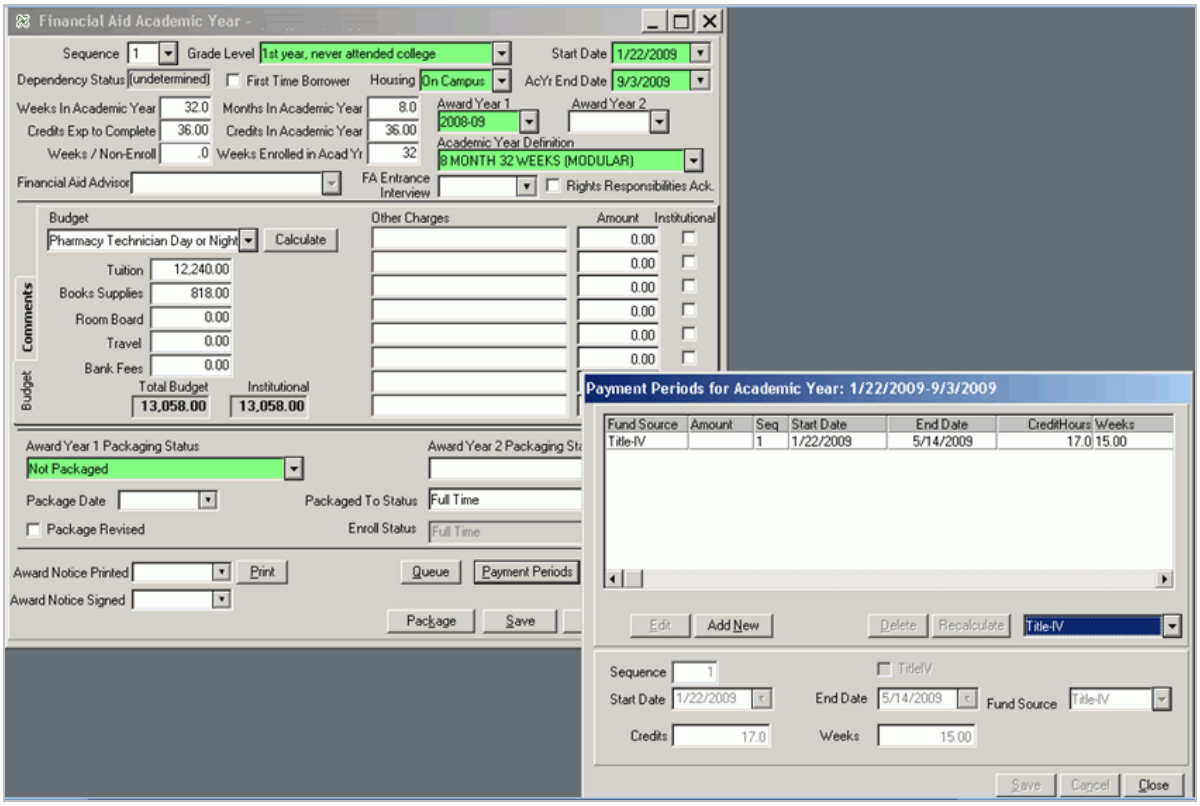
- The end dates are set to a point in time where both the "weeks" and "credits"/"hours" payment period attributes are satisfied.
- If the "weeks" attribute is satisfied prior to credits or hours, CampusNexus Student sets the payment period End Date to the end date of the course that completes the credits or hours requirement.
- If the "hours" or "credits" attribute is met prior to weeks, CampusNexus Student sets the End Date of the payment period to the end date of the instructional weeks block.

Note: A payment period can never end on a holiday configured in the Calendar setup in CampusNexus Student (**Lists > Academic Records > Calendar (tab)**). The End Date will always be the day after the holiday ends.

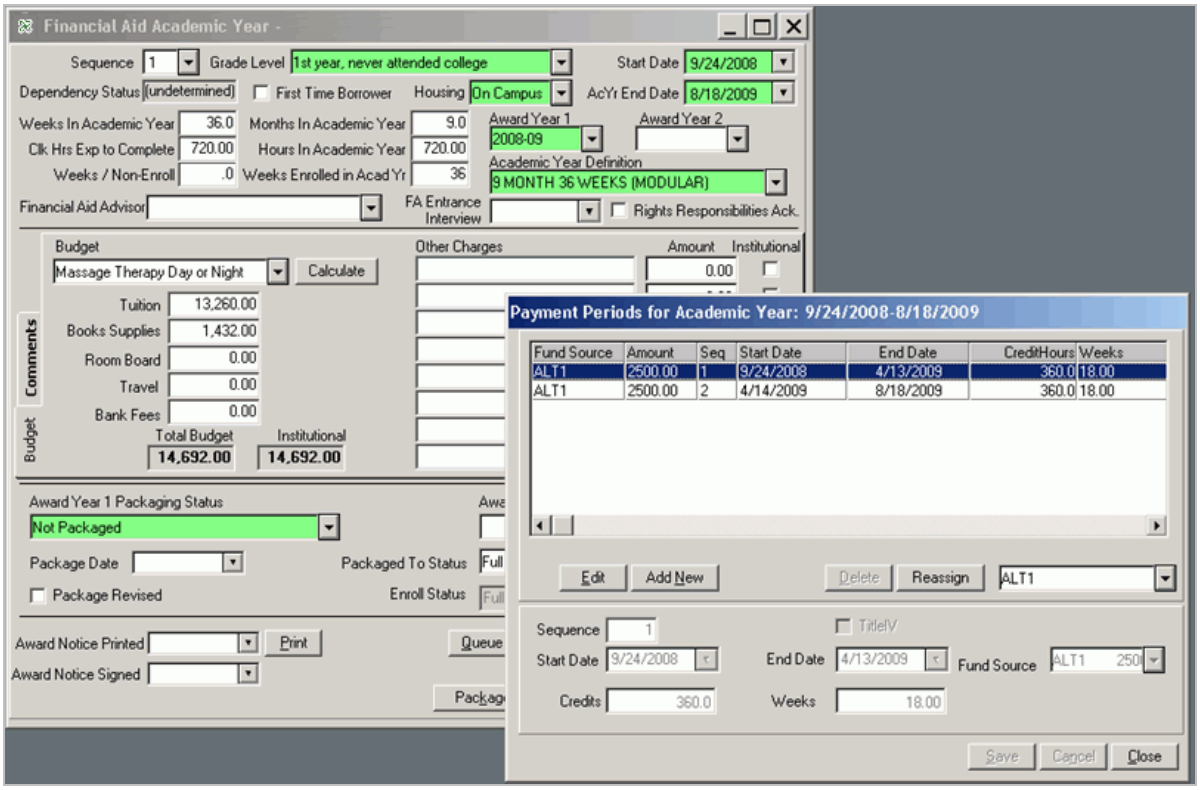
Delete payment periods in descending order to ensure that there is no gap in the sequence.



For Title IV payment periods, the "Add New" button is available only when a payment period was deleted and needs to be added back. This button adds missing payment periods. It is disabled if there is no missing payment period.

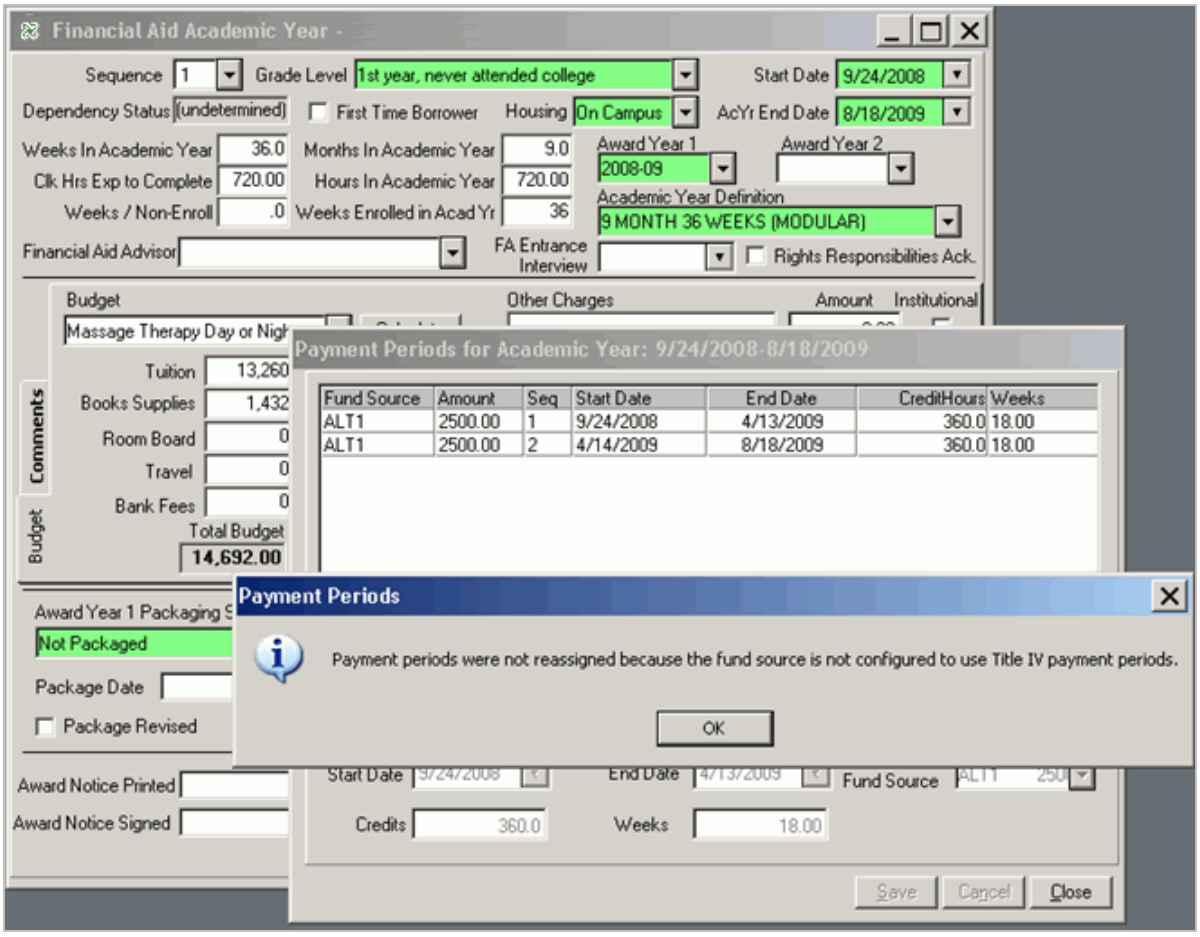


For Non-Title IV payment periods, the "Add New" button is available to add additional payment periods as needed.



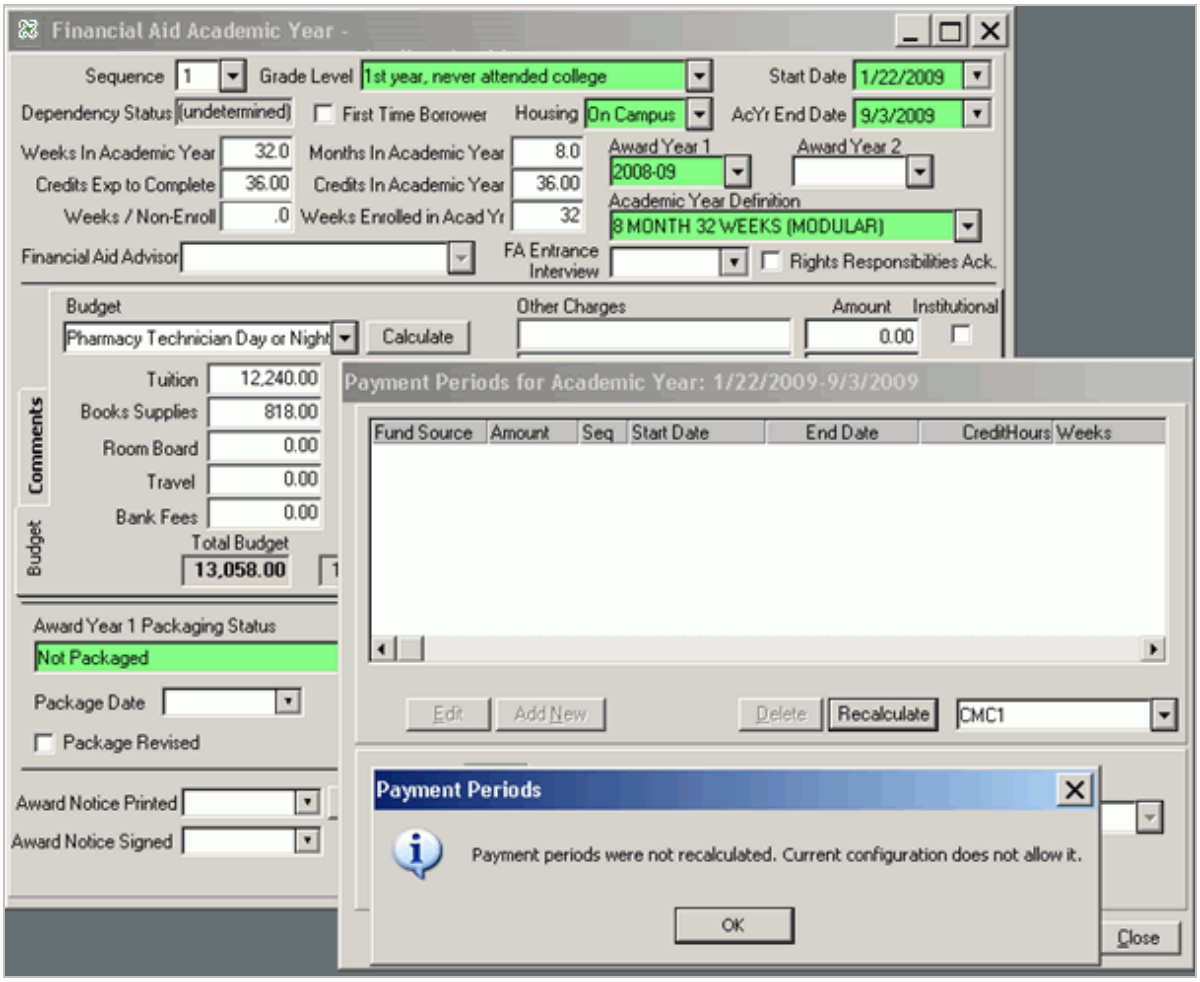
Reassign

The Reassign button enables you to reassign fund sources that are currently **not using** Title IV payment periods to **use** Title IV payment periods. Select a Non Title IV fund source and click Reassign. The fund source must first be reconfigured to use Title IV payment periods under Lists > Financial Aid > Programs > Select the program > Select Program Version > Non-Term Payment Period tab. If the fund source is not reconfigured to use Title IV payment periods, a warning message states *"Payment periods were not reassigned because the fund source is not configured to use Title IV payment periods*".



Recalculate

The Recalculate button enables you to recalculate payment periods for fund sources that are currently using **Title IV** payment periods to use **Non Title IV** payment periods. Select Title IV fund source and click Recalculate. The fund source must first be reconfigured to use Non Title IV payment periods under Lists > Financial Aid > Programs > Select the program > Select Program Version > Non-Term Payment Period tab. If the fund source is not reconfigured to use Non Title IV payment periods, a warning message states "*Payment periods were not recalculated. Current configuration does not allow it.*"



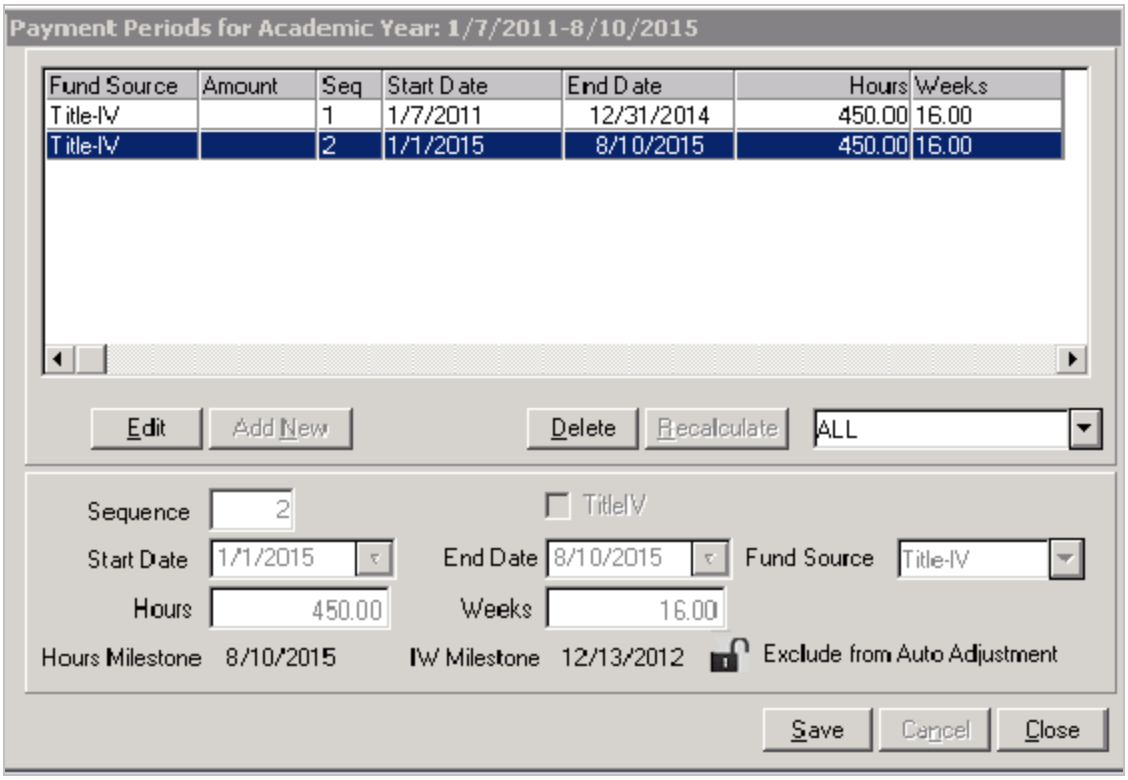
Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. . When saving, if you leave the Weeks Enrolled in AY set to zero (0), a warning message is displayed asking if you want to save the record with zero for Weeks Enrolled.

Payment Periods for Non-Term Institutions

Exclude from Auto Adjustment

The Exclude from Auto Adjustment option is enabled when you click Edit. This feature is available only if the Edit capability is selected in the configuration for that user's Staff Group and 'Allow Edit of Payment Periods' is selected on the Staff Member configuration . The Start Date and End Date fields are enabled when you click Edit. See your system administrator for further information regarding these configurations.

The Exclude from Auto Adjustment feature enables you to manually modify payment period start and end dates and not have the dates changed by the automated process for tracking student progress. This prevents the payment period dates selected and AY dates for that payment period from automatically adjusting.



Locking/Unlocking the Payment Periods

Clicking the lock/unlock icon next to the **Exclude from Auto Adjustment** label toggles the feature between the locked state and the unlocked state. When locked, the payment period is excluded from Auto Adjustment. When unlocked, the payment period is included in Auto Adjustment. Using this logic, one payment period can be excluded without excluding the other.

Note: When you try to unlock a payment period, CampusNexus Student checks whether any subsequent payment periods are locked. If subsequent payment periods are locked, the following message is displayed: *Subsequent Academic Years and Payment Periods are excluded from auto adjustments. If you want to include this academic year in auto adjustment, the system must also include all the subsequent Academic Years and Payment Periods in auto adjustment. Do you want to continue?*

- If you click **Yes**, all subsequent payment periods and academic years are unlocked.
- If you click **No**, there is no action and you are returned to the form.

When you click **Save**, the caption *"These payment period dates are now excluded from auto adjustment."* is displayed at the bottom of the Payment Periods form.

Notes: **Regarding Payment Period creation and Student Pace Evaluation (SPE) logic**
CampusNexus Student can create Payment Periods that extend past the end date of the Academic Year (AY) based on the system configuration for the length of the AY and using Term Sequencing for Non-Standard Term programs (Academic Calendar 1). See also Student Pace Evaluation.

IW (Instructional Weeks) Milestone and **Hours Milestone**
These labels and dates are populated based on the FaStudentAyPaymentPeriod table, which is calculated by the corresponding stored procedure.

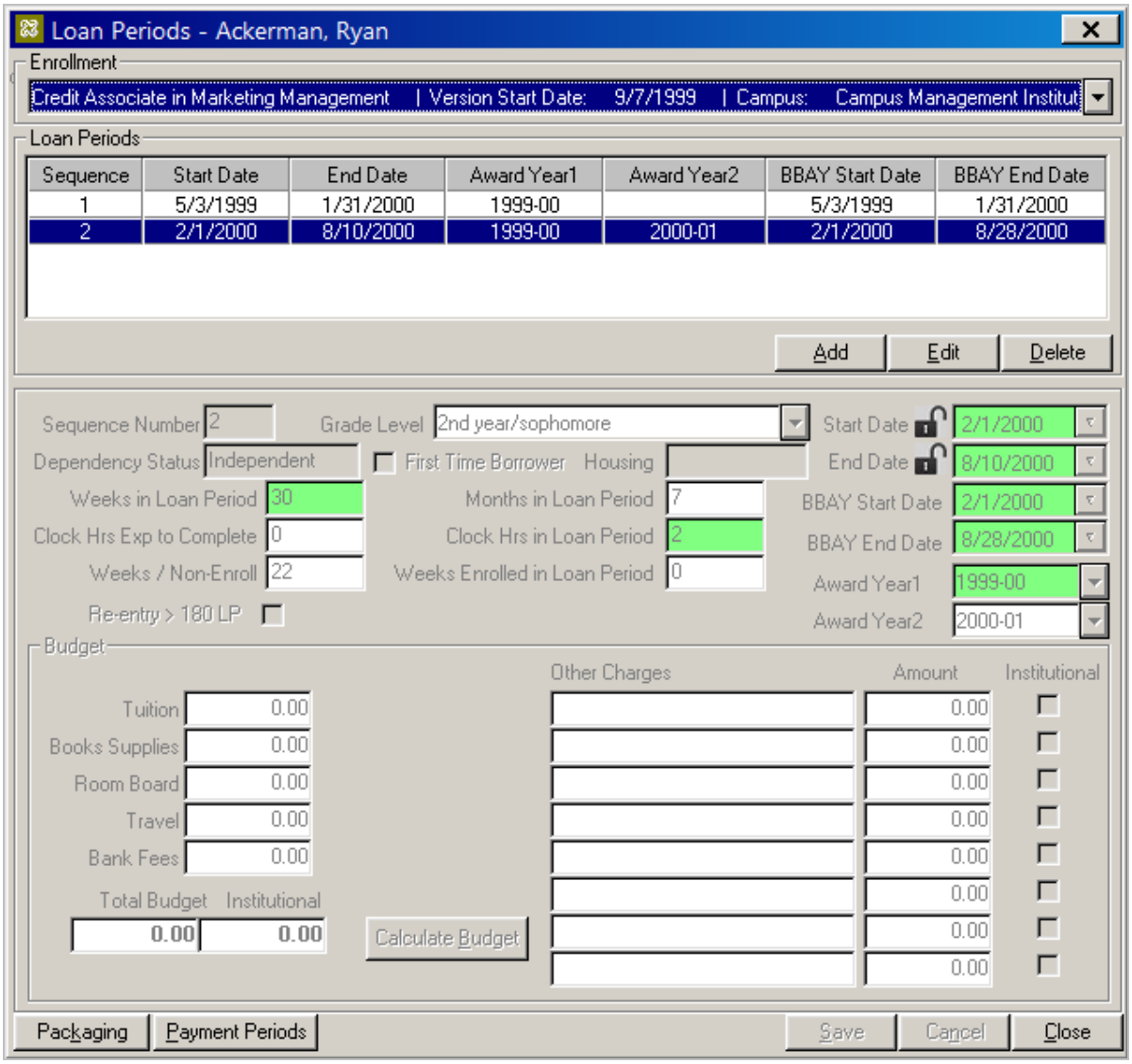
To set Field Level Security for the form:

Leave the Financial Aid Academic Year form displayed, and navigate to **Setup > Field Level Security**. Set the field level security for the fields in the form.

Loan Periods

The Loan Period menu options are available only when at least one of the student's enrollments is non-standard term (academic calender 1) and not SE9W, clock hour (academic calendar 5) or non-term (academic calendar 6) program.

1. Navigate to **View > Financial Aid > Loan Period** to view the Loan Periods form.



2. Select the **Enrollment** for the student. The following information is displayed for each enrollment:

   Enrollment Name | Version Start Date | Campus

   If there is no Version Start Date, the Expected Start Date is displayed. When there are multiple enrollments, the active enrollment is selected as the default enrollment when the form loads. If there is no active enrollment, the enrollment is selected based on hierarchy.

3. Select a record in the **Loan Periods Grid**. The grid lists all the loan periods that belong to the selected Enrollment.

When the form loads, the sequence number loaded first is the one containing today's date, which is between the start date and end date of the loan period. If a sequence number is not found, a future sequence number that is closest to today's date is selected. If there is no future sequence number, the last sequence number is selected.

4. Click **Add** to add a new loan period to the selected enrollment. The Add mode enables you to:

   - Add one record a time.
   - Complete the sequence of any missing loan periods.

   The Add mode locks the enrollment and loan period grid so that you remain on the selected record until you complete the action.

   If the campus of the selected enrollment uses Global as the financial aid servicer, no new loan periods can be added.

   Note: The Add button is enabled only when the selected enrollment is configured for academic calendar 5 or 6.

5. Select a loan period record and click **Edit** to change the loan period data.

   Note: The Edit button is enabled only when loan periods exist in the list and a loan period is selected. When the Edit mode is enabled, the Payment Periods, Packaging, Add, and Delete buttons are disabled until the action is saved or canceled. The Edit mode also locks the Enrollment and Loan Period grid so that you remain on the selected record until you complete the action.

6. Select a loan period record and click **Delete** to remove the record.

   If a loan exists for the selected record and you click Delete, the following message is displayed: *Direct loan exists for this loan period. Cannot delete*.

   When the loan period is deleted, any loan payment periods and their related audit records can be deleted after inserting an audit record of the loan period and the loan payment period.

   Note: The Delete button is enabled only when loan periods are loaded and one loan period is selected.

7. The **Sequence Number** is a read-only field that identifies the Loan Period Sequence number of the record selected in the Loan Periods grid.

8. The **Grade Level** identifies the grade level at which the student will be working in the selected loan period. By default, the loan period's grade level is populated with the grade level of the academic year in which the loan period starts. You can adjust the loan period's grade level by editing the loan period and selecting the appropriate grade level.

   A student must be assigned a 'graduate' grade level to qualify for a Graduate PLUS loan.

   Grade levels are defined under Lists > Academic Records > Grade Level.

9. The **Start Date** is the start date for the student in this loan period. The **End Date** is the loan period end date.

   For the first loan period,CampusNexus Student defaults to a date calculated from the student's enrollment date plus the number of weeks in the loan period. The end date of the student's second and succeeding loan periods are estimated using the number of weeks in a loan period and the number of weeks not enrolled. You can change the estimated date if necessary.

   Note: The Loan Period Start and End Dates can be modified independently of the BBAY Start and End Dates.

10. If you have permission to 'Exclude from Auto Adjustment' as configured on the Staff Information form, click the lock image to toggle between the Lock and Unlock states as follows:

Unlock: Allows this date to be adjusted by the Student Pace Evaluation (SPE) tool.

Lock : Excludes this date from Auto Adjustment.

If you try to unlock a loan period, CampusNexus Student checks if any subsequent loan periods are locked. If subsequent loan periods are locked or excluded, the following message is displayed: *Subsequent Loan Periods and Loan Payment Periods are excluded from auto adjustments. To include this Loan Period in auto adjustment, the system must also include all the subsequent Loan Periods and Loan Payment Periods in auto adjustment. Do you want to continue?*

Select **Yes** to unlock all subsequent loan payment periods and loan periods. Select **No** to take no action and return to the form.

11. The **Dependency Status** is a read-only field that indicates the FA model that is being used for the selected student; in other words, Dependent or Independent. This field is populated with the dependency status of the Academic Year in which the loan period starts.
12. Select the **First Time Borrower** check box if the student is a first time borrower and you want to delay the first loan disbursement by the number of days entered in Financial Aid Settings. This check box inherits its value from the academic year in which the loan period starts.
13. **Housing**: Select from **On Campus**, **Off Campus**, or **With Parents**. This field inherits its value from the academic year in which the loan period starts. For more details on the Housing Status, please refer to Budgets Codes-Financial Aid Housing Status.
14. The **Weeks in Loan Period** field indicates the number of weeks the student should attend for the selected loan period sequence. Any sequence prior to the final sequence should be set using the weeks defined for a full loan period.

    In a non-term configuration, the weeks in a final loan period can change from the definition configured on the program version based on student need. When student need changes, the weeks of the final loan period are prorated based on the number of credits needed in the final loan period and a ratio of credits to weeks from the definition of a full loan period.

    Example

    > If a student needs 14 credits in the final LP, and the definition of a full LP is 24 credits/30 weeks, CampusNexus Student calculates the following:
    >
    > 30/24 * 14 = 17.5 (rounded up to 18 weeks)

    When you edit this field for a program version configured to use Academic Calendar 5 or 6, CampusNexus Student displays the attribute warning message. The message warns you if you try to manually edit and save values that would not match the values the system determines are needed.
15. The **Months in Loan Period** field indicates the number of months in the loan period.
16. The **BBAY Start Date** field indicates the Borrower Based Academic Year (BBAY) start date. The **BBAY End Date** indicates the Borrower Based Academic Year (BBAY) end date.

You can change these dates independently of the Loan Period Start and End Dates. The BBAY Start and End Dates represent a full Academic Year. When origination changes are pending, the data in these fields is red.

Note: For overlapping loans, the BBAY Start Date can be one of two values based on the following rules:

- If the Previous Institution AY Weeks is greater than or equal to 30 (minimum full year definition), the BBAY Start Date is calculated as:
  `Previous Institution Loan Start Date`
- If the Previous Institution AY Week is less than 30 (minimum full year definition), the BBAY Start Date is calculated as:
  `(BBAY End Date – Previous Institution AY weeks) + 1 day`

  The overlapping loan BBAY End Date is always the Previous Institution Loan AY End Date.

17. For clock hour enrollments (academic calendar 5) the **Clock Hrs Exp to Complete** field indicates the number of clock hours the student is expected to complete in this loan period.

    For non-term enrollments (academic calendar 6) the field is labeled **Credits Exp to Complete** and indicates the number of credits the student is expected to complete in this loan period.

18. For clock hour enrollments (academic calendar 5) the **Clock Hrs in Loan Period** field indicates the number of clock hours in this loan period.

    For non-term enrollments (academic calendar 6) the field is labeled **Credits in Loan Period** and indicates the number of credits in this loan period.

19. The **Weeks/Non Enroll** field indicates the number of weeks in the loan period that the student is not expected to be in attendance.

20. The **Weeks Enrolled in Loan Period** field indicates the number of weeks for which the student is enrolled in the loan period.

21. In the **Award Year 1** field, select the first award year in this loan period. By default, this field inherits its value from the academic year in which the loan period starts.

22. The **Re-entry > 180 LP** flag is used by the Student Pace Evaluation (SPE) tool in non-term configurations when students are re-entered after they have been out of school for more than 180 days. When the Re-entry button is clicked on the enrollment form, CampusNexus Student checks to determine if the re-entry date selected is more than 180 days from the NSLDS withdrawal date. If it is greater than 180 days, the system will find the first available LP sequence without financial aid (Estimated or Approved) and set its Start Date to the Re-entry Date. The system will then select the Re-entry > 180 LP check box, which will be used as the starting point for the SPE tool to monitor the student's progress through the remaining time in the program.

23. In the **Award Year 2** field select the second award year in this loan period.

24. The **Budget** section displays costs for Tuition, Book Supplies, Room Board, Travel, Bank Fees, Other Charges, and Amount. These amounts are automatically calculated when loan periods are created. Loan period budgets are calculated based on the calculated budget of the academic years.

    - **Tuition**: Refers to the tuition for this loan period.
    - **Book Supplies**: Refers to the books and supplies budget for this loan period.
    - **Room Board**: Refers to the estimated room and board expense for the student for this loan period.
    - **Travel**: Refers to the estimated travel expense for the student for this loan period.

- **Bank Fees**: If the Financial Aid Add Bank Fee flag is set to 'Prompt User', the program will ask, 'Add bank fee to COA?' when a new loan is saved. If you answer 'Yes', and the bank fee is greater than zero, the fee will be added to the Bank Fees field. If the Financial Aid Add Bank Fee flag is set to 'Yes', the program will always add bank fees to the cost of attendance. If the Financial Aid Add Bank Fee flag is set to 'No', there is no change to the previous loan procedures. Bank fees are not automatically added to the cost of attendance. You can, however, manually edit the Bank Fees field.
- **Other Charges and Amount**: Enter a description and an amount for up to eight additional budget items. These numbers usually come from the budget you select for this loan period. The amount cannot be a negative number. If you enter a negative number, the system displays a message indicating that Other Charges must be equal or greater than zero.
- **Institutional** (check boxes): For each of the eight Other Charges, check or clear the Institutional box. Institutional charges are those that are required by, and paid directly to, the school. They are counted as revenue for the school.
- **Total Budget**: This read-only amount appears below the budget components. It is the calculated total cost of attendance for this loan period.
- **Institutional**: This read-only field indicates the portion of the budget that is composed of institutional charges.

Click **Calculate Budget** to calculate the total cost of the loan period from academic year budget data. If the program version is configured to Auto Recalculate Budgets based on Instructional Weeks (IW), the manual recalculation uses the values in the 'IW week's and 'IM in LP' fields.

25. Click **Packaging** to access the Loan Period packaging form for the selected loan period.

    Note: The Packaging button is not available in Edit and Add modes.

26. Click **Payment Periods** to access the Loan Payment Periods form (see below) for the loan period selected.

    Note: The Payment Periods button is not available in Edit and Add modes.

27. Click **Save** to save the current record after data validation occurs. If the validation fails, an error message is displayed stating why the validation failed and asking if you want to continue.

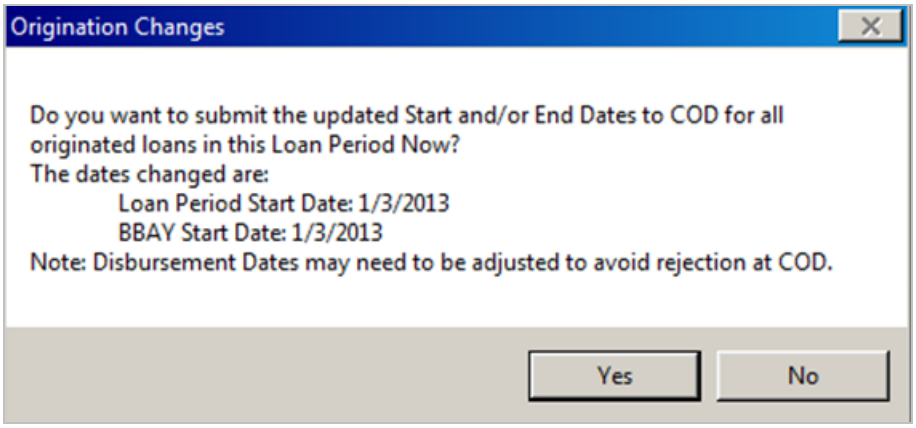
    Error Messages include the following:

    - End date must be after start date.
    - Loan period end date is after the graduation date. Do you want to continue?
    - Loan Period start date must be within an Academic Year date range.
    - Loan Period start/end date overlap another loan period. Do you want to continue?
    - Weeks and credits/hours in all loan periods must be less than or equal to weeks and credits/hours in all Academic Years.
    - Hours in Loan Period is greater than full Academic Year definition. Do you want to continue?
    - Weeks in Loan Period is greater than full Academic Year. Do you want to continue?
    - Field must be numeric.
    - Weeks in Loan Period must be less than 1000.

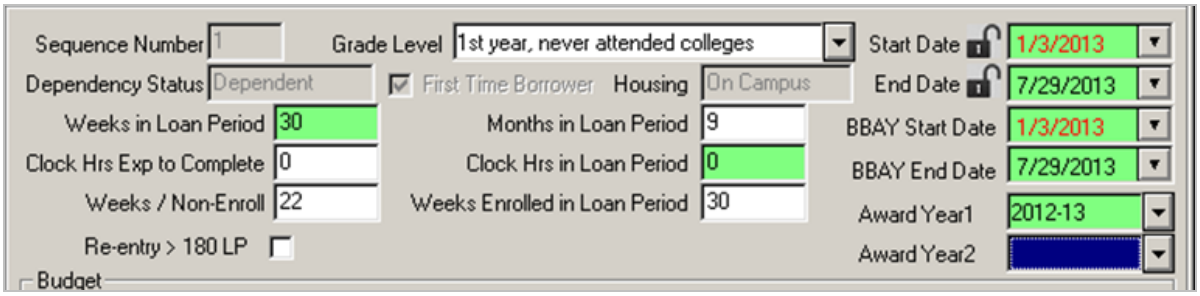
    Note: The Save button is enabled when you are in Add or Edit mode only.

Prompting for Origination Changes

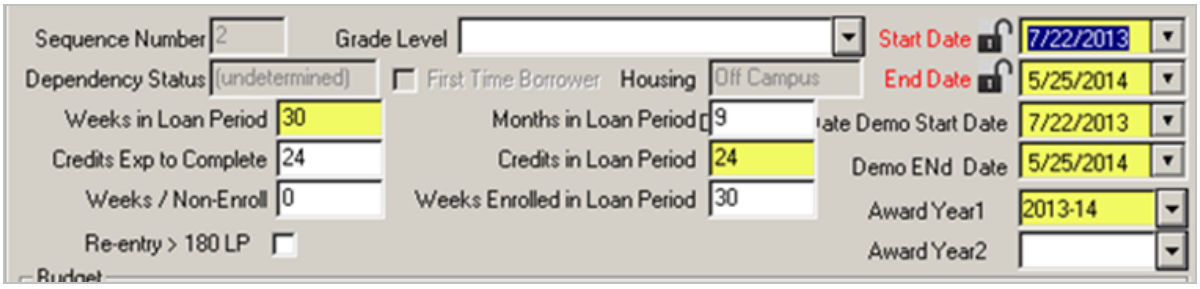
When any of the four date fields are modified, an Origination Changes message is displayed that dynamically lists which fields are changed, if the Loan Period on which the change is being made has a Direct Loan in an Accepted or Batched to Send status.



If the user selects 'Yes' to this message, then an origination change is created. This will send a change for each loan associated with the changed loan period that is in an Accepted or Batched to Send status. When the origination change is made, the field(s) with the corresponding pending change becomes highlighted in RED as a visual queue to the user. These will remain in Red until the origination change has been exported.



Once the Origination change has been exported, then the Caption of the fields will turn red until the response file is imported.



If the user selects 'No' to this message, no origination changes will be created for any of the loans.

Cancel Button: Enabled only in Add and Edit mode. When Cancel is clicked it rolls back all changes made to the loan period details, and it reloads the loan period selected.

Close Button: Always available. When the Close button is clicked in Add or Edit mode, the form closes and a confirmation message displays warning that all changes will be lost. In other modes, the form will close without a confirmation message appearing.

Loan Payment Period

Navigate to **View > Financial Aid > Loan Period > Payment Periods** (button). The Payment Period for Loan Period form is displayed. When initially creating loan periods and payment periods, CampusNexus Student uses instructional weeks to determine the actual dates based on the weeks attribute.

The Start Date for Sequence 1 of a payment period sets the start date for the instructional weeks block for the enrollment. The initial payment period Start Date is aligned with the Program Version's Start Date.

For subsequent payment period start dates, CampusNexus Student sets the Start Date to the day after the prior payment period's End Date in either of the following cases:

- If the first course in the subsequent payment period starts before the end date of the prior payment period

  - OR -

- If there are any credits or hours carried over from the prior payment period.

If these conditions are not met, CampusNexus Student sets the start date to the next course's start date.

Note: 'Hours' appears for Clock hour programs, and for all others, 'Credits' appears.

For payment period end dates, the end dates are set to a point in time where both the weeks and credits/hours payment period attributes are satisfied.

- If the weeks attribute is satisfied prior to credits or hours, CampusNexus Student sets the payment period End Date to the end date of the course that completes the credits or hours requirement.
- If the hours or credits attribute is met prior to weeks, CampusNexus Student sets the End Date of the payment period to the end date of the instructional weeks block.

Credits in Loan Period

Enter the number of credits in the loan period (LP).

This field represents the number of credits that the student should attend for the specific LP sequence that is selected. Any sequence prior to the final should be set using the credits defined for a full LP.

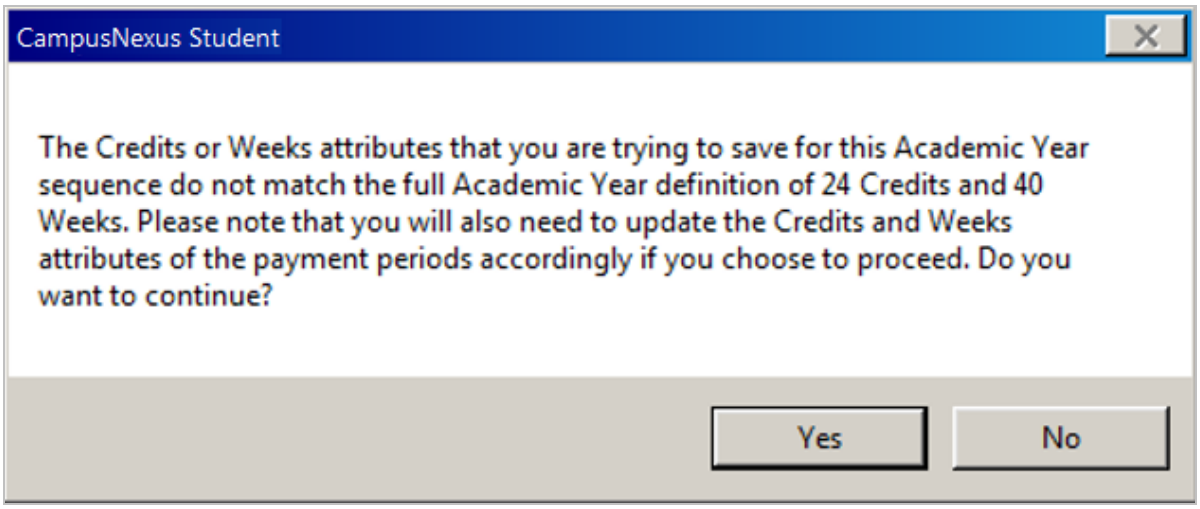
In a non-term configuration, the credits in a final LP can change from the definition configured on the program version based on student need.

Example

> A student transfers 10 credits. The credit transfer reduces the amount of credits needed to complete the program version requirements. The final LP credits are reduced by 10.

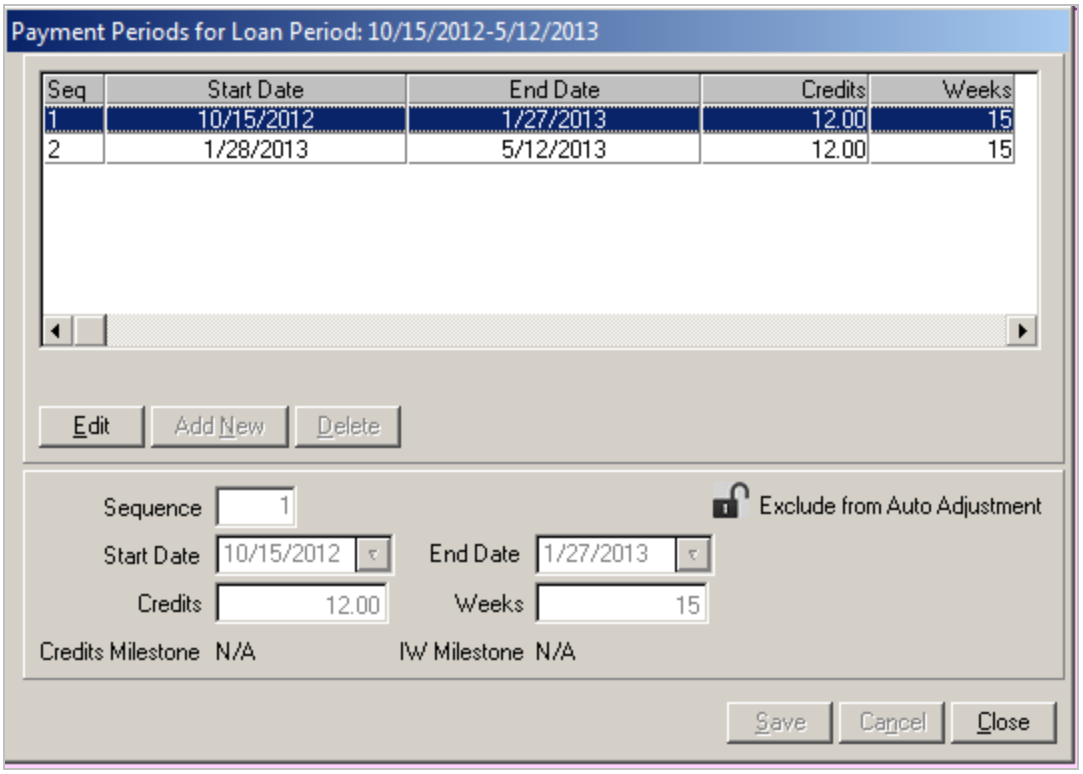
When you edit this field for a program version configured to use Academic Calendar 5 or 6, the system displays the attribute warning message. The message warns you if you try to manually edit and save values that would not match the values the system determines are needed. The system is able to calculate the value of the "Credits in Loan Period" field for the final LP based on the remaining credits needed.

Attribute warning message



Weeks/Non Enroll

Note: A payment period can never end on a holiday configured in the Calendar setup in CampusNexus Student (Lists > Academic Records > Calendar tab). The End Date will always be the day after the holiday ends.



Title IV Eligibility

Payment periods that the student will not attend are flagged to indicate that the student is not eligible for TIV funds during that payment period since the student will be unable to establish eligibility for TIV funds.

The 'notEligibleforT4' flag is set to 1 for the following scenarios:

- A final non-zero credit payment period occurs with a credits milestone that is the same as a prior payment period (i.e., the student registered enough credits to complete the program version in the payment period prior to the final payment period). Use cases are AY/LP having 1 or 2 payment periods. Disallow rolling credits is disabled to create this data pattern for a final AY/LP with a single payment period.
- A zero credit payment period can occur when the flag to allow adjustment to 0 is enabled. See Allow zero out extra AY/LP under Setup > Campus Information > Financial Aid (tab). Extra payment periods that are unneeded but cannot be removed due to constraints are updated to have 0 credits/hours.

When the flag is set to 1, the Payment Period for Academic Year form displays the message: *"The system has calculated that the student will complete the program prior to this payment period. The student is not eligible for the TIV funds associated to this payment period."*

You can configure an alert for a staff member when a payment period is flagged non-eligible for Title IV funds. For more information, see TIV Eligibility Alert under Setup > Campus Information > Financial Aid (tab).

Edit Button: Edits an existing payment period with all existing validations; an audit record is created.

Add New Button: Adds an existing payment period with all existing validations; an audit record is created. The Add New button is available only when a payment period was deleted and it needs to be added back. In other words, this button adds missing payment periods. It is disabled if there is no missing payment period.

Delete Button: Enabled only if the loan payment period is the latest sequence. Be sure to delete payment periods in descending order to ensure that there is no gap in the sequence.

Save Button: Saves all records to the appropriate table with all validations.

Cancel Button: Rolls back changes made in Add and Edit modes.

Close Button: Closes the form.

Exclude from Auto Adjustment: This option will be enabled when you click the Edit button. However, this feature will only be available if you have Edit capability defined in the configuration for that user's Staff Group, and the 'Allow Edit of Payment Periods' option selected on the Staff Member configuration. The Start Date and End Date fields will be enabled when you click the Edit button. Please see your system administrator for further information regarding these configurations.

The Exclude from Auto Adjustment feature gives you the ability to manually modify both payment period start and end dates and not have the dates changed by the automated process for tracking student progress. Note that this will prevent the payment period dates selected and academic year dates for that payment period from automatically adjusting.

You will also notice the caption 'These payment period dates are now excluded from auto adjustment' printed on the bottom of the Payment Periods form. This will appear once you click the Save button.

IW weeks and **IM in LP**

IW weeks and IM in LP are conditional fields that become enabled when the program version is configured to "Auto recalculate budgets" (see Lists > Financial Aid > Programs > Program Version).

- **IW weeks**

  This field which represents the number of instructional weeks (IW) that occur within the date range of the loan period (LP) dates. The field is populated/updated by a system calculation if "Auto Recalculate Budgets" is enabled for the program version.

  The field is used by the system to calculate the IW months value for the LP sequence. The minimum value of the field should never be less than the "Weeks in LP" field, however, it could be calculated to a value that is greater for certain course registration patterns. The number of IW could differ from the calendar weeks of the same time frame.

  If projection is used to calculate the week milestone and the credits milestone is the same date, the value should not be greater than the "Weeks in LP" value.

- **IM in LP**

  This field represents the number of instructional months (IM) that occur between the dates of the loan period (LP). This field is populated by a system calculation that divides the value of the "IW in LP" field by 4.333. If the resulting value contains a decimal of .5 or higher, the months are rounded up, else the months are rounded down.

  The "IW Months" value is used in budget calculations when "Auto recalculate budgets" is selected for the program version. (A similar field is contained on the Loan Period form and used for calculations on that form).

Locking/Unlocking the Payment Periods

Clicking the lock/unlock icon next to the Exclude from Auto Adjustment label toggles the feature between the locked state and the unlocked state. When locked, the payment period is excluded from Auto Adjustment. When unlocked, the payment period is included in Auto Adjustment. Using this logic, one payment period can be excluded without excluding the other.

Note: When a user attempts to unlock a payment period, a check is performed to determine whether any subsequent payment periods are locked. If subsequent payment periods are locked, the following message is displayed:

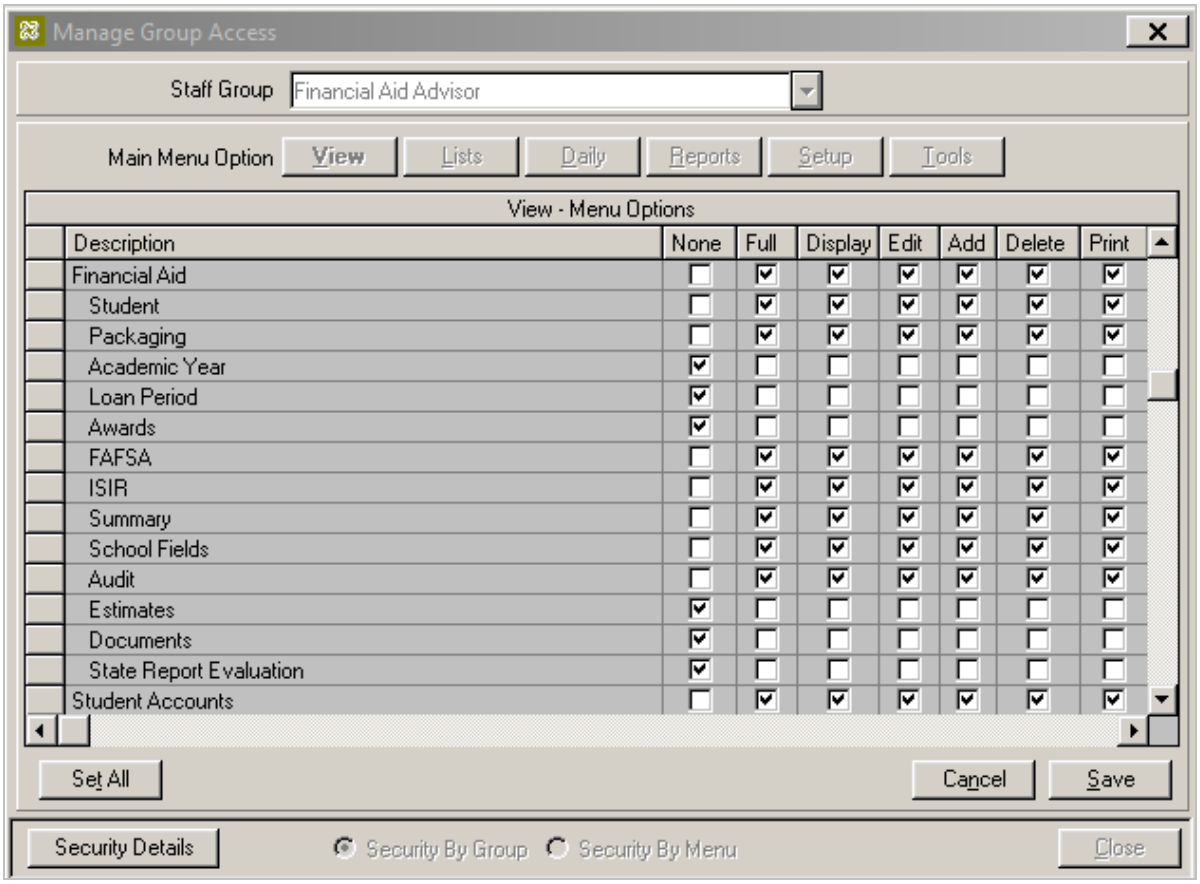
'Subsequent Loan Periods and Payment Periods are excluded from auto adjustments. To include this loan period in auto adjustment, the system must also include all the subsequent Loan Periods and Payment Periods in auto adjustment. Do you want to continue?'

If the user clicks Yes, all subsequent payment periods and loan periods are unlocked. If the user clicks No, there is no action and the user returns to the form.

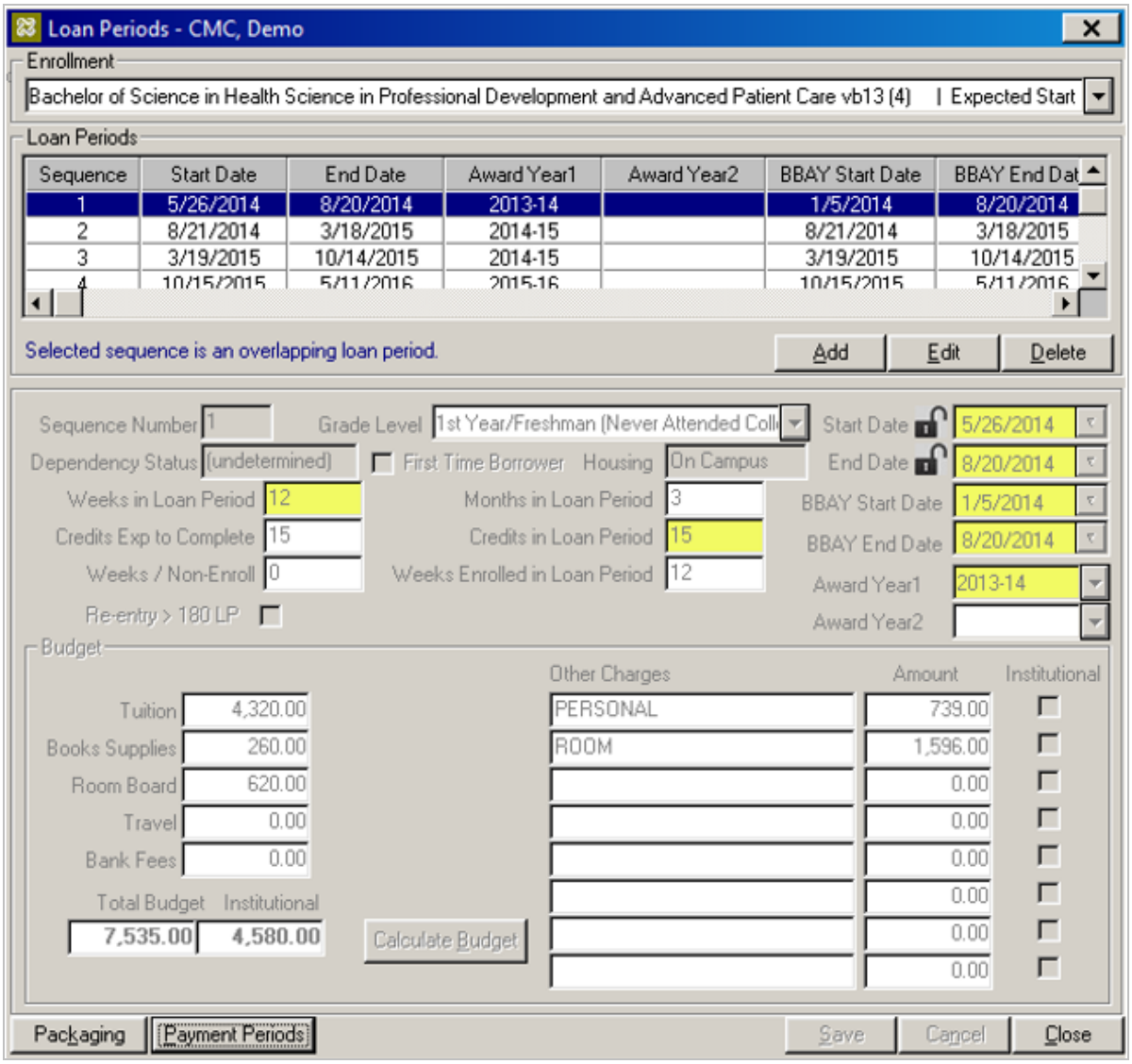
Note: When you click Save, the caption 'These payment period dates are now excluded from auto adjustment' appears at the bottom of the Payment Periods form.

Security

The security access for the Loan Period for all Groups is the same as that defined for Academic Year for all Groups (Setup > Security > Staff Group (Financial Aid Advisor)).



Overlapping Loan Periods



If the selected loan period is an overlapping loan period (stub loan period), a message on the Loan Periods form indicates that the selected LP sequence is an overlapping loan period.

The date range of overlapping is static, which means they won't be updated by the SPE (Student Pace Evaluation). Therefore, the payment periods for the overlapping loan period are also static. If there are two LPPs in the overlapping loan period, the first LPP represents the first half of the loan period and the second loan period represents the second half of the loan period.

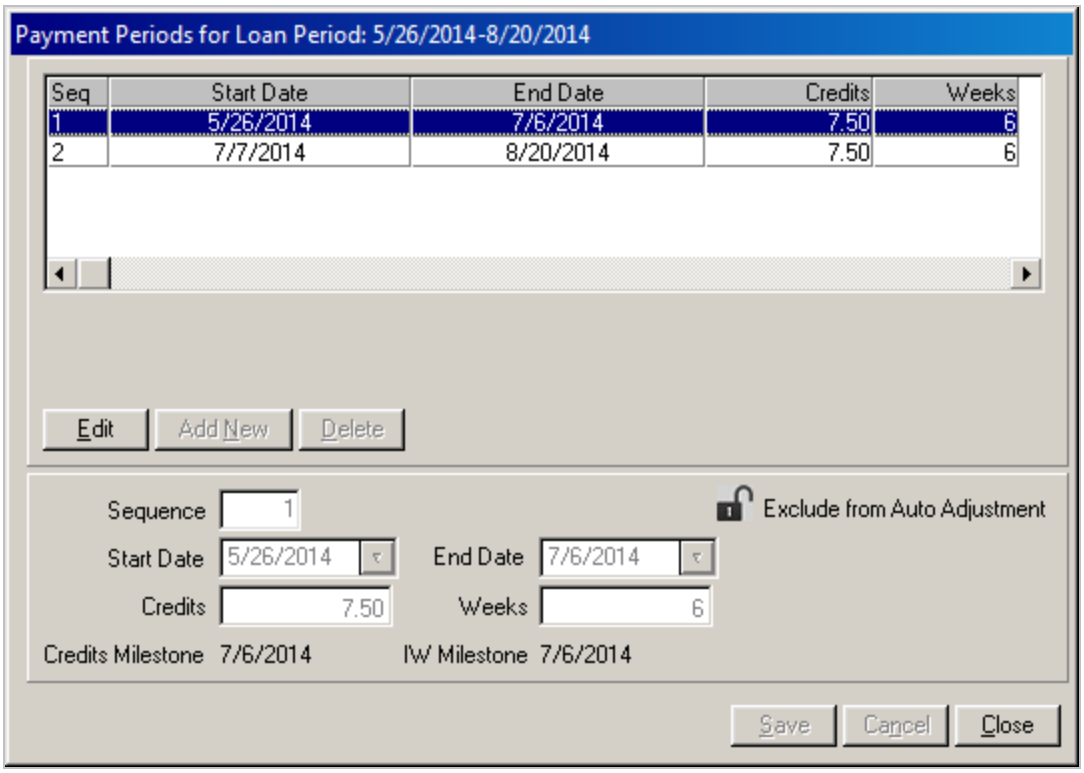
Since CampusNexus Student uses the stub units in the NSLDS form as the credits/hours requirements to create the overlapping loan period and leverage these same units to set the Scheduled Complete / Completed flag for the overlapping loan period, changes to the credits/hours or weeks attributes of the overlapping loan period should be done through the NSLDS form. No action is triggered when you change the credits/hours and weeks attributes of the stub loan period on the Loan Periods form.

- If the stub loan period is not completed and you change the credits/hours or weeks on the stub loan period through the loan period, the following message is displayed: "*In order to maintain data consistency and ensure progress of all loan periods are reevaluated properly, manual changes to the credits/hours of the overlapping loan period should only be made through the student's NSLDS form. Do you want to continue save the changes without reevaluating progress of all loan periods?*" Click **Yes** to save the new credits/hours attributes. Click **No** to cancel the change.

- If the stub loan period is completed and you change the credits/hours or weeks on the stub loan period through the loan period, the following message is displayed: "*Overlapping loan period has been completed. Changes to the credit credits/hours or weeks attributes of the loan period is not allowed.*" Click **OK**. The original values are restored.

Note regarding calculated dates for payment periods of a stub loan period:

The Credits Milestone date and IW Milestone date of LPP1 are set to the midpoint of the stub loan period and will remain unchanged. Also, the Credit Milestone date and IW milestone date of LPP2 are set to the end date of the stub loan period and will remain unchanged. The end date for each LPP is programmed to match its milestone date.



Awards

The Awards menu option (**View > Financial Aid > Awards**) is a shortcut to the Financial Aid Packaging form. The same form is accessed by navigating to **View > Financial Aid > Packaging > Academic Year > Package**. See Packaging for more details.

- If the student's academic year dates were calculated using the "weeks in academic year" value, but the "Use TermInAYDates" flag is enabled for the enrollment campus, the academic year start/end dates are displayed in red.
- If the dates are manually altered, the flag is reset and the dates are displayed in their normal font color. See also Academic Year and Fund Source.

SULA Flag on Awards Form

On July 6, 2012, Public Law 112-141 was enacted. This law contains a provision that eliminates the subsidy on Direct Subsidized Stafford Loans when a “first time borrower” enrollment exceeds 150% of the published program length.

For award years 2014-15 and higher, the Subsidized Usage Limit Applies (SULA) flag (where the valid values are Y or N) has been added to the COD system. Upon receipt of a Direct Loan actual disbursement with a first disbursement date on or after July 1, 2013, COD determines if the borrower meets the definition of a "first time borrower" to confirm that the 150% subsidy limit applies to the borrower.

When the SULA flag is set to Y, a SAR comment code 267 will appear if a first time borrower student is subject to the subsidized loan limitation. The message directs users to the studentaid.gov site. This flag is viewed for all academic years but is only populated for the current award year. When the ISIR is received and the SULA flag is associated with a comment code, document triggers associated with the comment code are activated. The SULA flag is also displayed in the Financial Aid Packaging form.

Student Centric Awards View

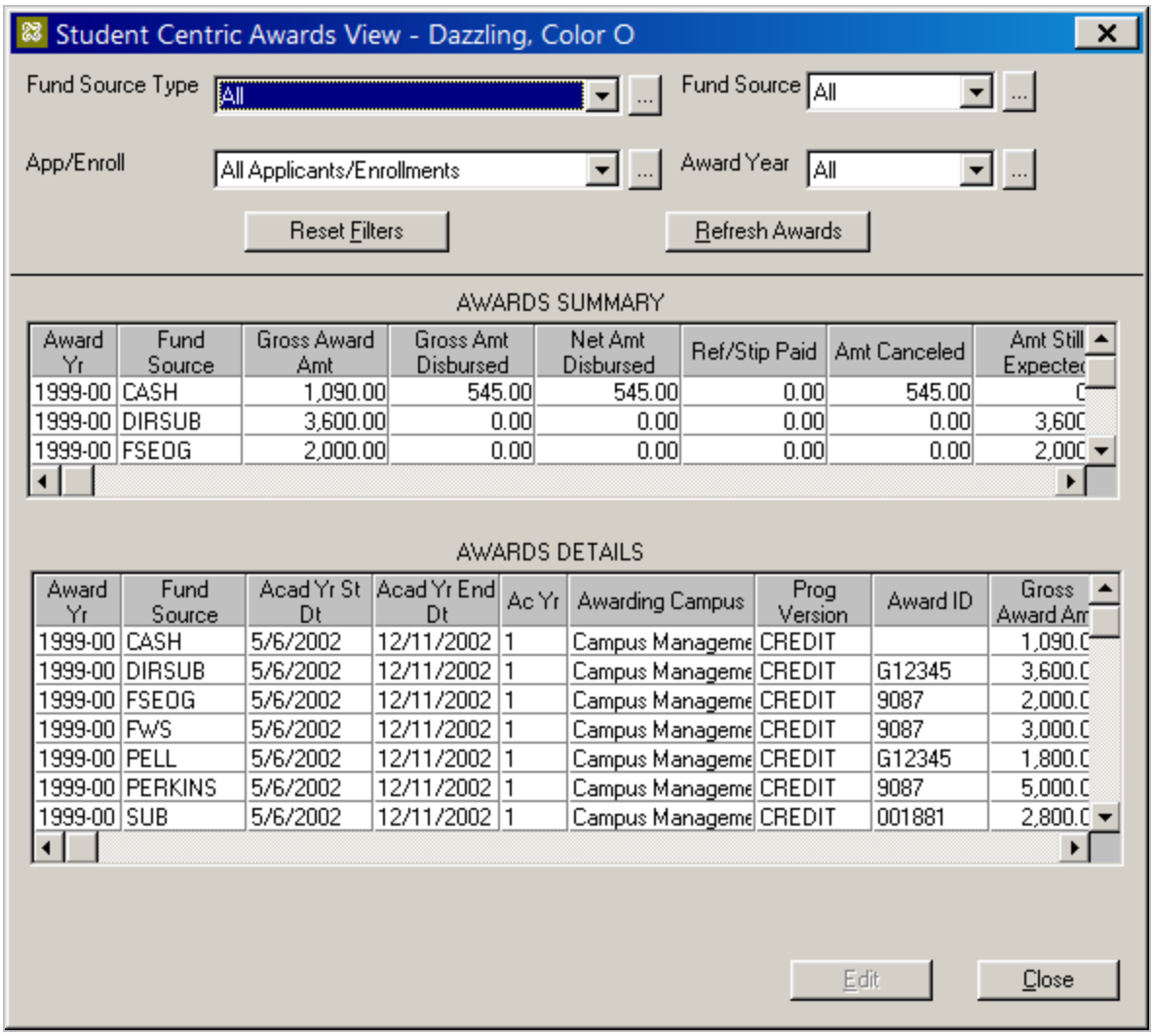
The Student Centric Awards View form displays all financial aid awards for a student and enables the user to filter records and edit awards.

To work with the Student Centric Awards View form:

1. Select a student.
2. Navigate to **View > Financial Aid >** Awards. The Financial Aid Packaging form is displayed.
3. Click **Student View** on the Financial Aid Packaging form.

   Note: The Student View button on the Financial Aid Packaging form is not available if no awards are allocated for any of the student's enrollments.

   The Student Centric Awards View form is displayed.



4. Filter the view by **Fund Source Type**, **Fund Source**, **Application/Enrollment**, and/or **Award Year**. Award Detail

and Summary information is displayed depending on the filter selection.

- The Award Summary contains the following fields:
    - Award Year
    - Fund Source
    - Gross Award Amt
    - Gross Amt Disbursed
    - Net Amt Disbursed
    - Refunded/Stipend Paid
    - Amt Canceled
    - Amt Still Expected.

  The Amt Still Expected equals the Gross Award Amt minus the Gross Amt Disbursed minus the Amt Canceled.

  Note: If (Gross Award Amt minus Amt Canceled) is greater than the maximum amount allowed by Pell, the Pell award record is displayed in bold RED.

- The Award Details section contains the Award Summary fields plus the following fields:
    - Academic Year Start Date
    - Academic Year End Date
    - Academic Year
    - Awarding Campus
    - Program Version
    - Award ID
    - Net Award Amt
    - Refunds/Stipends Scheduled

  Note: If the Academic Year Start Date for any Academic Year falls between the Start and End Dates for any other Academic Year displayed and the Fund Source types are the same, the following message is displayed in bold RED at the bottom of the screen: *"The Loan Periods are Overlapping for the Two Academic Years."*

5. Click **Refresh Awards**. The award records that match the filter selection are displayed.
   - OR -
   Click **Reset Filters**. All award records are displayed.
6. With appropriate permissions you can edit the award records. Select a record and click **Edit**. The financial aid form corresponding to the selected award record is displayed.

   Note: Work study awards cannot be edited.
7. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Financial Aid Summary

The Financial Aid Summary option provides a display of summary information relating to the student's financial aid situation. Use the scroll bars to see more of the display. Right-click anywhere in the window to get a shortcut menu. From this menu, you can print the summary report.

Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

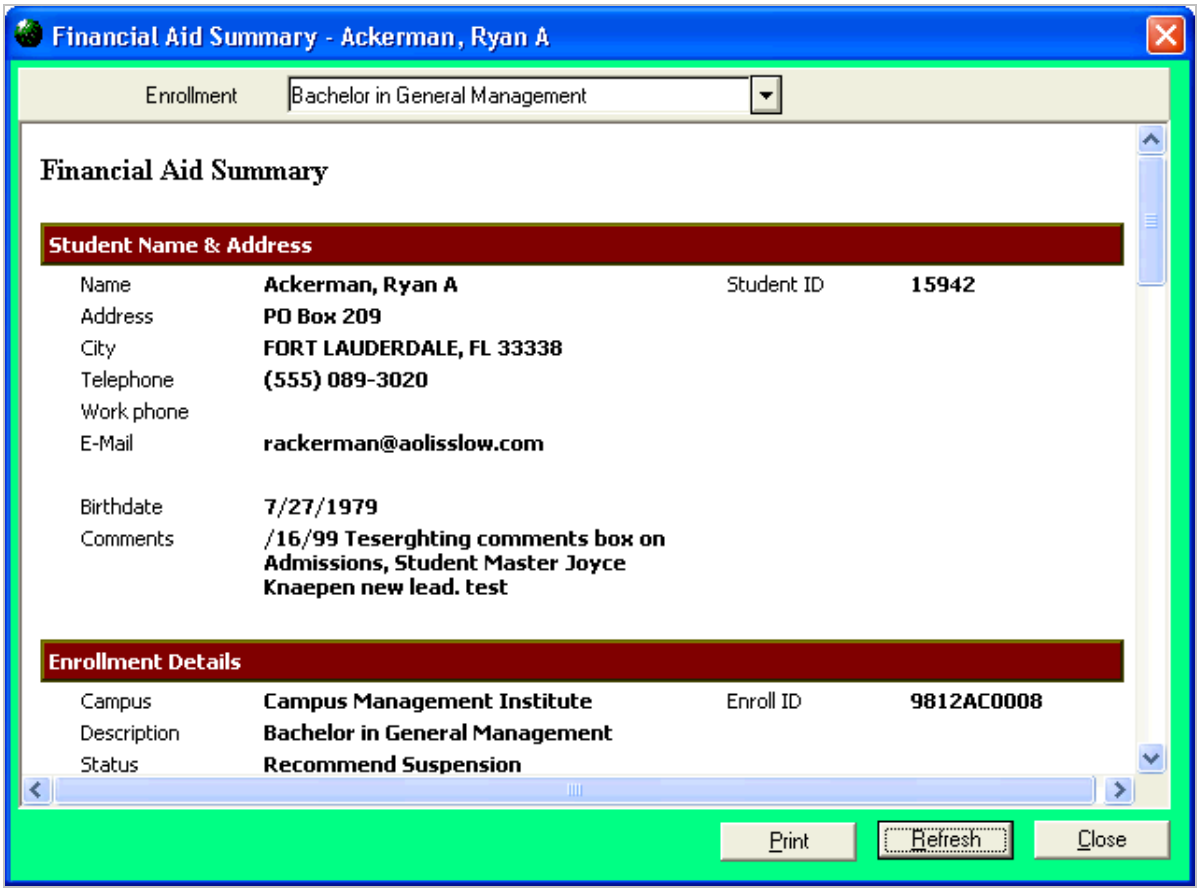
The FA Summary Report will show the comments from FaStudentAY.Comments for each Academic Year (AY) represented on the form. If Comments are present in the student's AY record, they will appear below "Net Funding Scheduled".

Sections of the report include:

- Student Name and Address
- Enrollment Details
- Academic Years

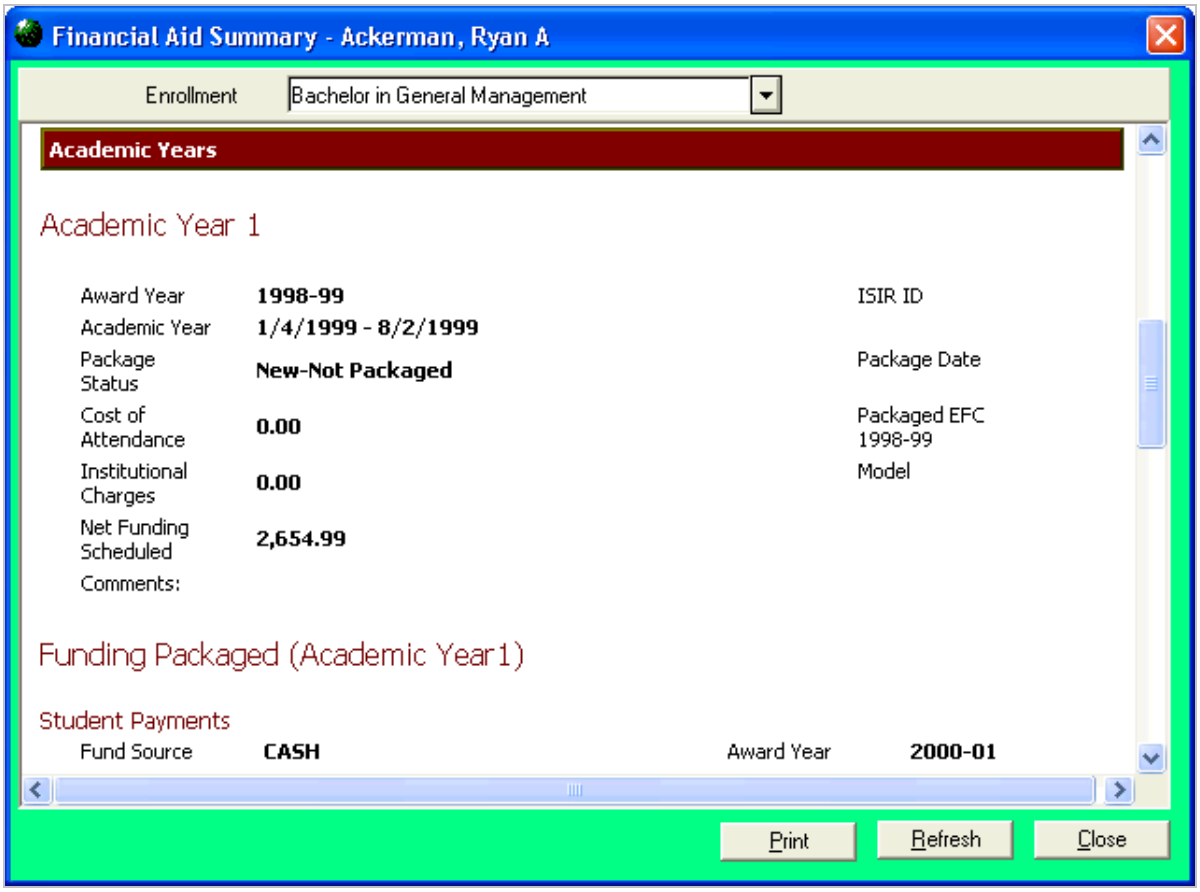
For each academic year, the report shows cost of attendance and funding data.

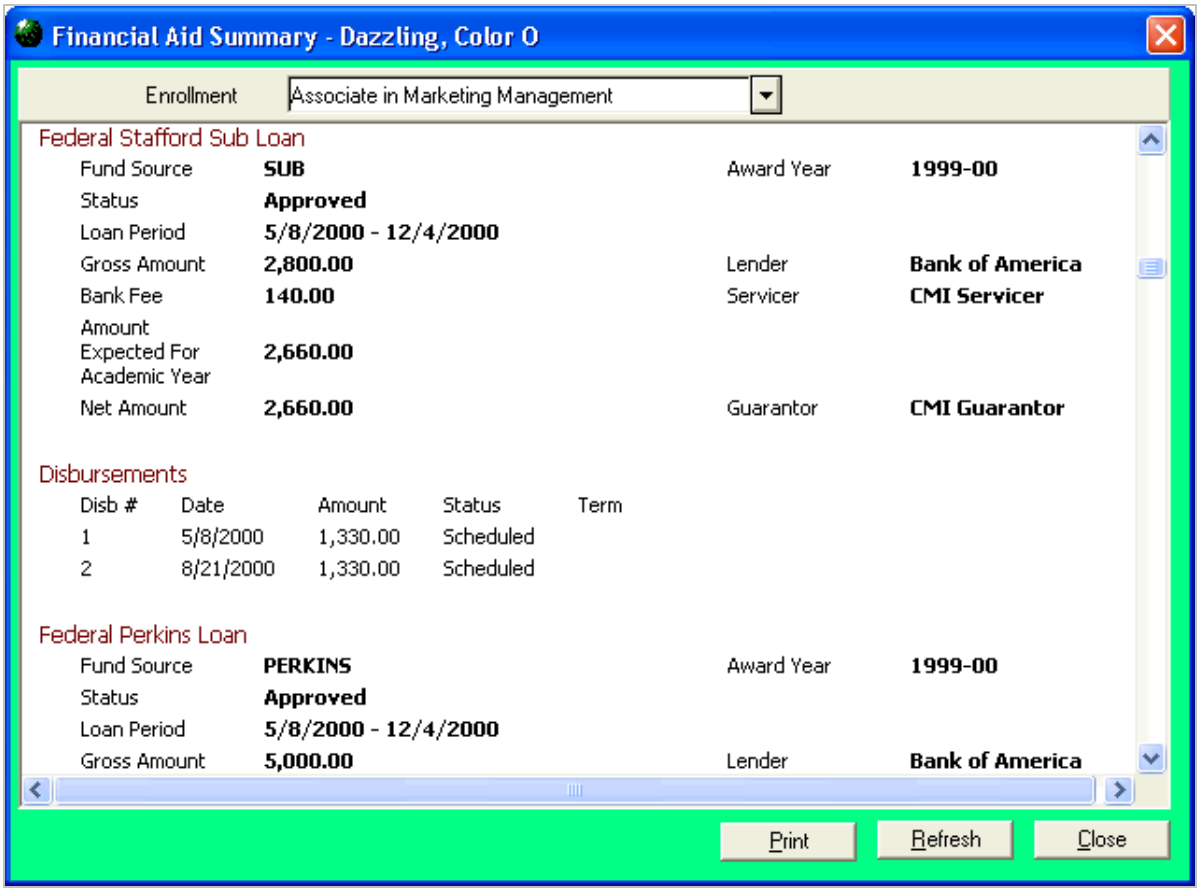
The student's Financial Aid Advisor is listed in the Enrollment Details section of the report.



This option lists a summary of all FA packaged for a student. It is sorted by academic year. Each academic year has heading information displayed.

- **Net Funding Scheduled**. The net funding scheduled is calculated by summing the Net Need Based Aid Packaged and the Cash/Other Packaged.
- **Award Year**. This is a new field on this report.
- **Packaged EFC**. The display lists the EFC from the Pell that was used in the packaging process.
- **ISIR ID**. This field displays the Student Pell Transaction ID.





Academic Year Details

Within each academic year is a detailed listing of each FA award/loan packaged.

Pell Grant

- Origination ID. This is a new field. It is listed in the header section of the Pell Grant.
- Amount. The caption of this field has been changed to "Award Amount".
- Amount Expected for Academic Year. This is a new field. It lists the amount expected for the academic year.
- Scheduled Disbursements. This section lists only the disbursements that apply to the academic year.
- Term. A "Term" column has been added for each scheduled disbursement.

Other Grants

- Amount. The caption of this field has been changed to "Award Amount".
- Amount Expected for Academic Year. This is a new field. It lists the amount expected for the academic year.
- Scheduled Disbursements. This section lists only the disbursements that apply to the academic year.
- Term. A "Term" column has been added for each scheduled disbursement.

Student Loan (not a Direct loan)

- Amount Expected for Academic Year. This new field lists the amount expected for the academic year.
- Scheduled Disbursements. This section lists only the disbursements that apply to the academic year.
- Term. A "Term" column has been added for each scheduled disbursement.

Direct Loan

- Amount Expected for Academic Year. This new field lists the amount expected for the academic year.
- Loan ID. This is a new field.
- Origination Status. This is a new field.
- Prom Note Status. This is a new field.
- Scheduled Disbursements. This section lists only the disbursements that apply to the academic year.
- Term. A "Term" column has been added for each scheduled disbursement.

Cash/Other Payments

- Amount. The caption of this field has been changed to "Amount Scheduled".
- Amount Expected for Academic Year. This new field lists the amount expected for the academic year.
- Scheduled Disbursements. This section lists only the disbursements that apply to the academic year.
- Term. A "Term" column has been added for each scheduled disbursement.

Print the Summary

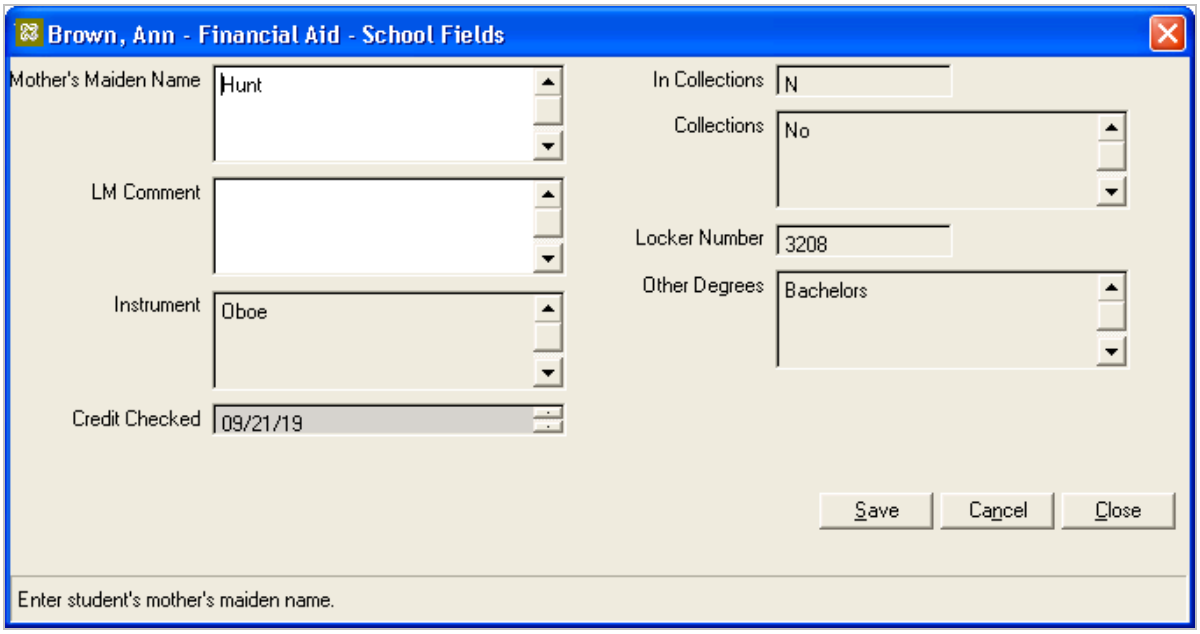
This display is in the form of an "HTML" page. **Right-click** the form to see a shortcut menu with **Print** and other options.

School Fields - Financial Aid

School-Defined Fields are set up by your system administrator to collect information that is not required by the generic CampusNexus Student application. (See Setup > School Defined Fields.) The fields are organized by department during setup. At least one department has the authority to change each field. Some fields may be viewed but not edited in your department. A field may be flagged as confidential by the originator, i.e., not viewable outside of the department that is using it. For instance, if a field can only be viewed or edited by the Financial Aid Department, it will only be visible when the form is opened from **View > Financial Aid > School Fields**. If you do not have access to that menu option, you will not see this field.

To view or edit school fields:

1. Select **View** > **Financial Aid** > **School Fields**. The School Fields form is displayed.



2. Click on or tab to a field that you want to change. Select an option or enter data to edit the field.

   The fields are displayed in edit mode (white background) if your department has been given permission to change the data. Fields that are unavailable are read only. Fields that are listed but are unavailable and show no data have yet to be filled in by the staff member responsible for doing so.

3. Click **Save** to save any changes you make to editable fields.

4. Click **Cancel** to close the form without saving any changes.

Financial Aid Audit

This form displays changes to financial aid awards in conjunction with the Servicer Integration. It enables users to track changes made by the data imports from servicers. In addition, the program tracks any changes to awards made by in-house users and changes in application processing status.

The fields on the grid include Property, Old Value, New Value, Date Changed, User Name, and Comments. The program includes variable data in the comments column to describe the recorded change further.

The system also tracks any changes to Academic Year (AY), Loan Periods (LP), and associated payment period credits or hours and weeks, as well date changes. Tracked changes include those made by automated AY/LP adjustments, automated budget recalculations, SPE user interface, and Automated SPE updates.

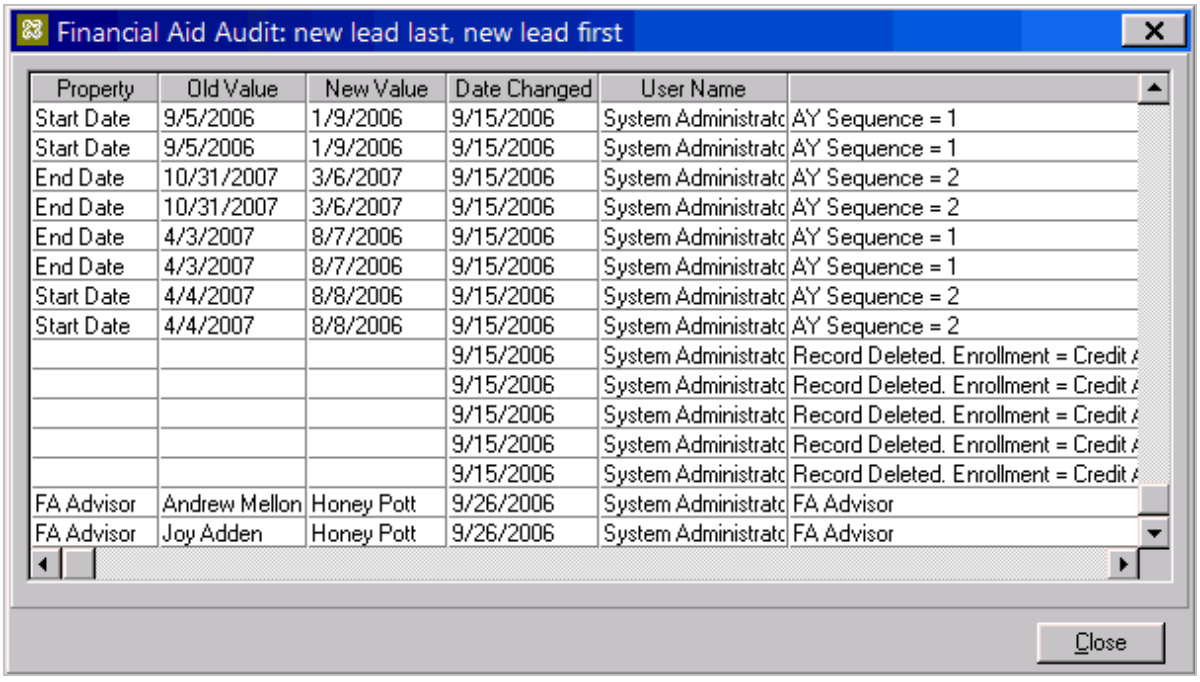
Budget information from the student's academic year are recorded, including the Budget selected, amount for Tuition, Book Supplies, Room Board, Travel, Bank Fees, and all Other Charges. Any changes to this information is also posted.

BBAY Start and End Date fields now appear on the Loan Period form, Ac Yr Start and End Dates and the Loan Period Sequence fields now appear on the Direct Loan form, and modifications to these fields are recorded in the Financial Aid Audit form.

The Financial Aid Audit Folder tracks changes for the amount packaged and award status, award year and fund source whether the award is active or deleted. Changes to net amounts, dates of disbursement, and term of the disbursement, date of scheduled disbursement for active as well as deleted awards. The Financial Aid Audit folder also records changes to documents such as status, date approved, date requested, date sent, document type, and document status whether active or deleted. This is a read-only form.

To view the Financial Aid Audit:

1. Select the student for whom you want to view the financial aid change data.
2. Navigate to **View** > **Financial Aid** > **Audit**. The Financial Aid Audit form for the student is displayed.



3. Scroll to the right to see the Comments column.

4. Click **Close** to close the form.

Financial Aid Estimates

Note: For the latest content about FAFSA, ISIR and COD processing, access Regulatory Help.

This option performs Financial Aid estimates and prepares estimated award letters to prospective students. The data thus created then moves to the enrollment once a student is enrolled. This option is available on prospective students not yet enrolled without the requirement for a FAFSA or ISIR. The option is also available for enrolled students.

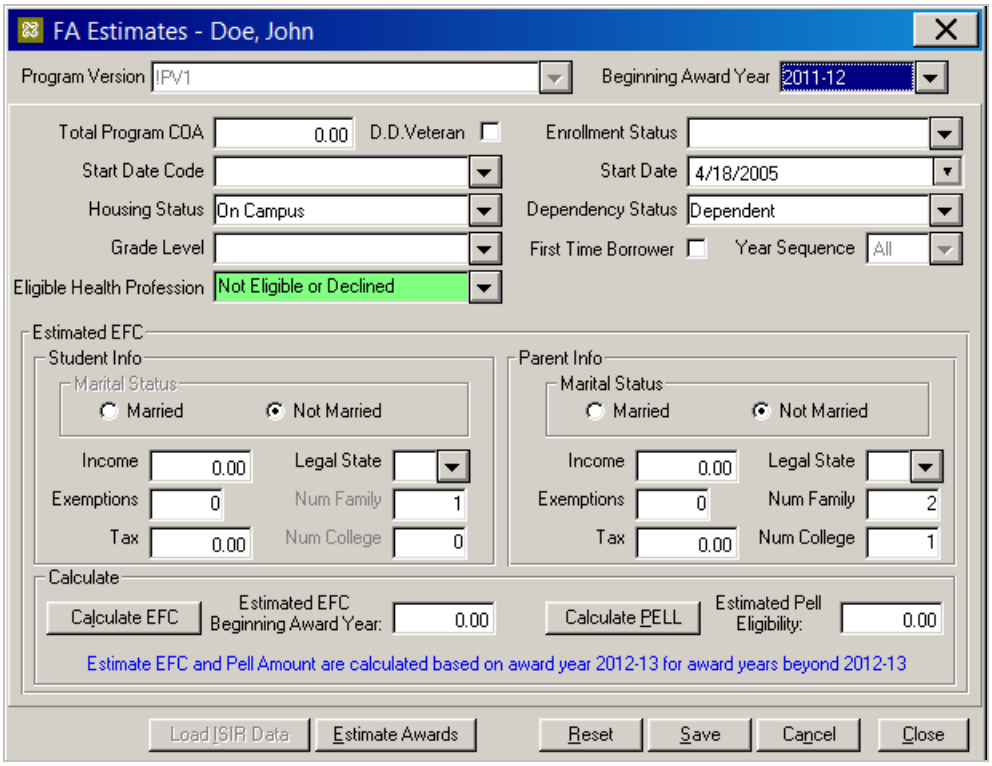
When an enrollment is added, and the award year on file in the estimated awards is an award year in the actual academic year records created during enrollment, the aid is "moved" to the appropriate academic year (using the award year) under the new enrollment record with a status of E - Estimated. Aid not meeting these requirements stays in the tentative award file.

- If an estimated award is moved to the enrollment, CampusNexus Student looks for disbursement schedules for the academic year start date and fund source. If a disbursement schedule exists, the disbursement records is added to the converted aid record.
- When the Multiple Disbursements feature is enabled, CampusNexus Student uses the disbursement rules engine instead of disbursement schedules when moving the estimate awards during the enrollment process. The Multiple Disbursements feature checks for the following settings:
    - "Carry over Estimated Aid to Enrollment" is enabled under Setup > Campus Locations > Financial Aid.
    - The program version used during the enrollment process matches the program version configured for the student's estimates.
    - The start date used during the enrollment process matches the start date configured for the student's estimates.

Note: When the user enters Program Version and Beginning Award Year in the FA Estimates form, CampusNexus Student pulls data from the students ISIR, if one exists, or a previous FA Estimate record if one exists. If a student has multiple ISIRs, the one with the highest transaction ID will be used. Data fields that could be populated from the ISIR are as follows: Enrollment Status, Dependency Status, Grade Level, Student Info, Parent Info, and Estimated EFC Beginning Award Year.

To prepare a financial aid estimate:

1. Select the new lead or student for whom you want to estimate financial aid awards.
2. Navigate to **View** > **Financial Aid** > **Estimates.** The initial FA Estimates form is displayed.



3. Select a **Program Version** (hypothetical). This is based on the campus you are logged in to. The "Inst. Cost" (Institutional Cost) column in the Program Version drop-down list displays the sum of Tuition and Books/Supplies for the whole Program. This information is set up in the Program Setup form.
4. Select a **Beginning Award Year** on which the FA estimates will be based.

   CampusNexus Student populates the **Total Program COA** from the preset formula.
5. Authorized users can select **D.D. Veteran** (Dependent of Deceased Veteran) to indicate that a student is the dependent of a veteran that perished after September 11, 2001. This check box is selected for academic years with award years 2009-10 or beyond. By default, the check box is cleared.
   - If D. D. Veteran is selected, eligible students receive the maximum Pell award as well as all Title IV aid based on a zero EFC.
   - If D. D. Veteran has already been configured for a student on the Financial Aid Packaging form (View > Financial Aid > Awards), the check box is selected when opening the form.
6. Select an **Enrollment Status**.
7. Select the **Year Sequence**. If this drop-down list is enabled, you can select the FA academic year to which this COA applies. If you change the Year Sequence, the system recalculates the COA for the newly selected academic year.
8. Select/clear the **First Time Borrower** check box, as applicable. This value determines the correct expected date of the first disbursement when aid in the estimates folder is moved to the student's financial aid package during the enrollment process.
9. Select values (or estimates) for **Dependency Status**, **Start Date**, **Housing Status**, **Grade Level**, and **Start Date Code**.

Note: Title IV rules state that a school must wait 30 days after the student's start date before disbursing Federal Student Aid (FSA) loans to the student if the student borrower is a first-time, first-year undergraduate student. (This limitation does not apply to PLUS loans.)

10. **Estimated EFC**: Enter the **Student Info** and **Parent Info** income and tax data.

    The system assumes zero for the amounts on Worksheets A, B, and C for students and parents. The system will ask if you want to recalculate the taxes after entering the exemptions and tabbing.

11. Click **Calculate EFC** to determine the estimated EFC amount.

12. Click **Calculate Pell** to determine the estimated Pell amount.

    CampusNexus Student uses the simplified needs formulas to calculate EFC for students (independent) or parents (dependent) with gross income over $50,000 (U.S.). You can manually enter the EFC and Pell amounts. You can calculate the EFC and Pell independently. This makes it easier to input the EFC directly and calculate the Pell eligibility without having to enter the additional student information

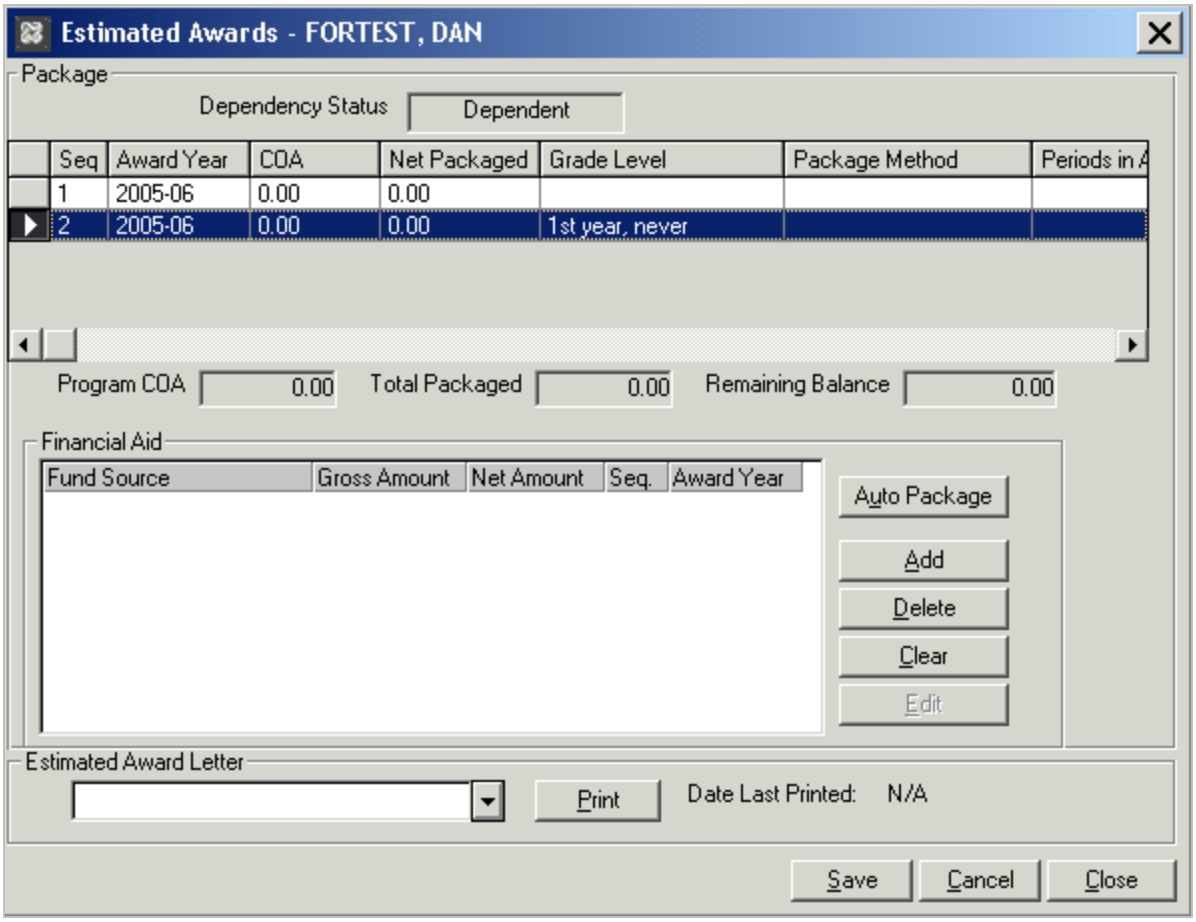
13. Click **Save**.

14. Click **Reset**. This action deletes from the database all estimate data saved. CampusNexus Student resets (clears) the **Estimate** form to begin another estimate for the student. CampusNexus Student also deletes all award data and academic years associated with the previous estimate.

15. Click **Load ISIR Data** to populate fields with ISIR data. This button is enabled only if the student has a valid ISIR on file.

16. Click **Estimate Awards.** CampusNexus Student displays the **Estimated Awards** form (frmFaEstimateAwards). In this form, you can add, delete, and edit estimated awards for the student (Fund Source, Award Year, and Amount).

    Only the academic year sequence selected is displayed in the academic year grid.



Field Descriptions

Field	Description
Sequence	Read-only. This field displays the Year Sequence as filtered in the FA Estimates form. For example, if you selected **All**, all academic years set up for this program are displayed; if you select **1**, the first academic year is displayed.
Award Year	Read-only
COA	Read-only
Net Packaged	Read-only. This is the net amount of the award. That is, the actual amount the student receives after fees.
Grade Level	Click in this cell and use the drop-down list to indicate a grade, if required.
Packaging Method	Click in this cell and use the drop-down list to indicate a packaging method for this award year if required.

17. Click **Auto-Package**to package automatically awards based on the estimated values for EFC, Pell, program version, grade level, award year, and packaging method. An aid package for only the selected academic year will be calculated for the student.

Total Packaged displays the total amount of the estimated award packaged. **Remaining Balance to package** displays the Cost of Attendance minus EFC and Total Packaged.

Note: CampusNexus Student uses loan limits on auto package and new origination fee of 2.5 % for award years on or after 2007- 08.

18. Click **Add** to add a new fund source to the estimated package.
19. Select the **Source** of the award - Grant, Loan, Student Payment/Other, or Work Study.
20. Specify the **Gross Amount**.
21. If you have selected **Loan**, the system displays the Loan Fees field. Click in this field. The system populates this field with the loan fees set up for this loan. For additional information on loan fees, refer to Direct Loan Form.

    Note: Estimated awards may differ from actual awards on the values in the Net Amount, Bank Fees, and Rebate Amounts fields. For estimated awards, the values for Net Amount, Bank Fees, and Rebate Amounts are calculated from the Gross amount of the award. The actual award will have disbursements, with the values for Net Amount, Bank Fees, and Rebate Amount calculated from the gross amount of the "disbursements" and summed up for the total. Therefore, there may be a variation between the values displayed for the estimated award and the actual award, once the student is enrolled.
22. Click **Edit** to make changes wherever this button is available.
23. Select the **Source** and **Award Year**, and specify the **Amount**.
24. Click **Save**to add the award to the list.
25. Select the estimated award letter from the drop-down list.
26. Click **Print** to print the Estimated Award Letter from the list (CampusNexus Student or Custom). The Date Last Printed is stored and displayed on the form.

    The Estimated Award Letter (lst_FaEstimatedAwardLetter) is similar to the actual award letter, but will be labeled "Estimated Awards". It does not display disbursements.
27. Estimated Awards form: Click **Close** to close the form.
28. FA Estimates form: Click **Close** to close the form.

Financial Aid Document Tracking

The FA Document Tracking form is similar to the Document Tracking form, but only shows Financial Aid-specific documents. It also allows the user to see ISIR information when an Award Year is selected in the main drop-down list.

This form displays a Completion Date field, showing the date on which all FA documents for the award year have been approved.

Note: The Completion Date field is NOT populated if the student is a US citizen and does not have an ISIR on file, even if all documents have been approved. If a student has no Financial Aid documents on file, or if no Financial Aid documents have been used for this student, the Completion Date field is instead labeled ISIR Rcvd Date. This only occurs when an ISIR is received for the award year selected. The document is considered approved when it is assigned a status whose code (Lists > Contact Manager > Document Status) has been set up with the **Approved** check box selected.

This form only displays Financial Aid documents. Therefore, no module selection is available. CampusNexus Student displays all enrollments. There is no enrollment selection tool.

This form features two tabs: The Document Detail tab and the ISIR Details tab.

To edit tracking data for listed documents:

1. Select the **View > Financial Aid> Documents**. The FA Document Tracking form is displayed. Any Financial Aid documents that have already been added to the student's list appear on the grid. An icon present in the left-most column of the grid indicates that the document is viewable.
2. Select an **Award Year**. If the option **All Years** is selected, the Completion Date cannot be evaluated and the system populates the Completion Date field with "N/A". If you choose a document that is set up as **Award Year Specific** (please refer to **Documents Code Setup** (Lists > Contact Manager > Documents > Add/Edit for a definition), then the Award Year list box will appear on the Document Detail tab as a required field. This enables the user to assign an award year to the document.
3. Click **Add Document List** to add a new list of documents to the tracking list. This action enables the **Document Detail** tab.

   Note: Documents appear on this list when they are added under Lists > Contact Manager > Documents. Document Status codes appear on this list after they are added under Lists > Contact Manager > Document Status. Only Financial Aid documents that have document statuses of "approved" will meet the documentation requirement to received Financial Aid disbursements, otherwise they are considered Missing documents.
4. Enter the **Date Requested**, **Date Due**, **Date Sent**, **Date Received**, and **Date Approved** data as it becomes available. The **Date Sent** field is automatically updated when a mail merge letter is printed that has the document included as an attachment.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Add Document List

To add or edit the tracking data for a Financial Aid document list:

1. Click **Add Document List** to add a new list of documents to the tracking list. This action enables the **Document Detail** tab. Select a document list from the drop-downs. Document Lists appear on this list when they are added from Lists > Contact Manager > Document Lists.
2. Select an initial **Document Status.** The same status is assigned to all documents on the document list. Document Status codes appear on this list after they are added from Lists > Contact Manager > Document Status.
3. Enter the **Date Requested**, **Date Due**, **Date Sent**, **Date Received**, **Date Approved,** and **Expiration Date** as

needed. The same dates are assigned to all documents on the document list.

4. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Add Document

Functionality is the same as the **Add Document List** button, except that the drop-down list displays individual documents to add, rather than groups of documents.

Display Document

This function works both with and without ImageNow. If your school has the necessary technology to scan or otherwise import images of student documents, you can load or scan them into the CampusNexus Student database. The document can be in any file format that can be processed by an application on your PC.

Note: The coding currently being used to display a document when the Display Document button is selected:

```
Set objImageNow = GetObject(, "imagenow.CtrlPanel")
Call objImageNow.INViewDocDID(ImageNowDocID0, ImageNowDocID1)
```

For version 6.0, the coding to display the document image must be changed to:

```
Set objImageNow = GetObject(, "imagenow6.CtrlPanel")
Call objImageNow.INViewDocDID(ImageNowDocID, -1, 0, 1)
```

The existing code to launch the ImageNow log on form if the Display Document button is selected but the user is not logged into ImageNow is:

```
lngReturn = ShellExecute(0, "", "imagenow32.exe", "", Replace(ImageNowPath, "\imagenow32.exe", ""), 1)
```

For version 6.0, the coding to call the ImageNow log in form if the user is not logged into ImageNow must be changed to:

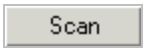
```
lngReturn = ShellExecute(0, "", "imagenow.exe", "", Replace(ImageNowPath, "\imagenow.exe", ""), 1)
```

To view a stored document:

1. Select a document on the grid and click **Display Document**. If no attachment has been stored for this document, a message states, *No attachment found for this document*. Otherwise, the name of the document is displayed.
2. If the document is available in a file but has not yet been imported into CampusNexus Student, click the **Upload Document** button to open a file browser from which you can pick the file for import. You can select any type of file that can be viewed by the software on your PC.

   Note: Once the file has been imported, it is no longer necessary (as far as CampusNexus Student is concerned) to retain the original image file. After the image is imported, it will be available for direct viewing. To view a file attached as a document, you must have the necessary software on your PC to open the file format in which the document is stored. Example file formats include .doc (Word), .xls (Excel), .vsd (Visio), and .txt (Notepad).
3. If you have a scanner attached to your computer and you have "Twain-compliant" scanning software, you can click **Scan** to import an image of the document directly from the scanner application. The program will open the Document Display form.
4. Click **Scan** Document on the Document Display form to activate your scanning application. The many available scanning applications preclude a detailed description of that process here. For example, however, using HP PrecisionScan Pro, once the document is scanned, you would click the **File** > **Place Image** to send the scanned image back to the Document Display form.
5. On the **Document Display** form, you can:

- Click **Load** to load a bitmap image file (*filename*.bmp) of the document. The bitmap file format is the only one you can load from this command.
- Click **Clear** to clear the previously imported document image.
- Click **Print** to print the document image.
- Click **Rotate** to rotate the document image 90 degrees.
- Click **Flip** to rotate the document image 180 degrees.
- Click **Close** to close the form.

6. In the **Document Display** dialog box, the other controls are:
   - View a document that is on file. When you view a document, it will be opened by the application that is designated in Windows to open that type of file. For instance, a file named Resume.doc will most likely be opened by Microsoft Word.
   - Clear the document from CampusNexus Student storage.
   - Return to the previous form.
   - 

Scan a document as described earlier in this topic.
   -

Close this form and return to the Document Tracking Form.
   - If a button shows in only black and gray tones, the function it represents is not available until something else happens. For example, you cannot view a document until it has been scanned in or loaded or, has been loaded. You cannot load another document unless the previous one is cleared.

Scan Cover Sheet

If the document you have selected is linked with ImageNow, the Scan Cover Sheet button is available. Click the Scan Cover Sheet button to print a cover sheet. This sheet contains bar codes for the student and the enrollment. The scan cover sheet is used to identify a student whose documents are being scanned with a scanner. For detailed information about ImageNow, see your system administrator.

Document Audit

The Audit function enables the user to see a history of changes made to a particular document. The purpose of this function is to track changes to the document and its status history. This enables schools to study the time it takes for each document to progress from the Requested or Required status to the On File status. Metrics can subsequently be developed with the goal of streamlining the process.

To audit a document:

1. Select a document in the grid and click **Audit.** A verification message is displayed prompting the user to view a history of all edits and changes made to the document.
2. Click **Yes** to see a history of all edits and changes made to all documents in the grid or click **No** to see the history of only the selected document. If a blank form is displayed, it indicates that there are no transactions on file for the

document(s).

3. Click **Close** to close the form. You are returned to the Document Tracking form.

Document Detail Tab

The Document Detail tab displays all information that applies to a document displayed in the grid. Click **Edit** to update any of this information. Use the Comments field to enter any information pertinent to the document.

ISIR Details Tab

The ISIR information displayed in the ISIR Details tab is the same as that in ISIR Received form; however, only the ISIRs received for the award year and ISIR codes will be displayed and cannot be edited. ISIRs can also be printed from this tab.

Note: For academic years 2007-2008 and further, the **Recalc EFC** column is displayed for institutions that have chosen the option to award students with a recalculated EFC (under Setup Menu > Campus Locations > Campuses > Financial Aid tab > Campus Financial Aid). This column is NOT displayed for prior academic years.

On July 6, 2012, Public Law 112-141 was enacted. This law contains a provision that eliminates the subsidy on Direct Subsidized Stafford Loans when a “first time borrower” enrollment exceeds 150% of the published program length.

For award years 2014-15 and higher, the Subsidized Usage Limit Applies (SULA) flag (where the valid values are Y or N) has been added to the COD system. Upon receipt of a Direct Loan actual disbursement with a first disbursement date on or after July 1, 2013, COD determines if the borrower meets the definition of a "first time borrower" to confirm that the 150% subsidy limit applies to the borrower.

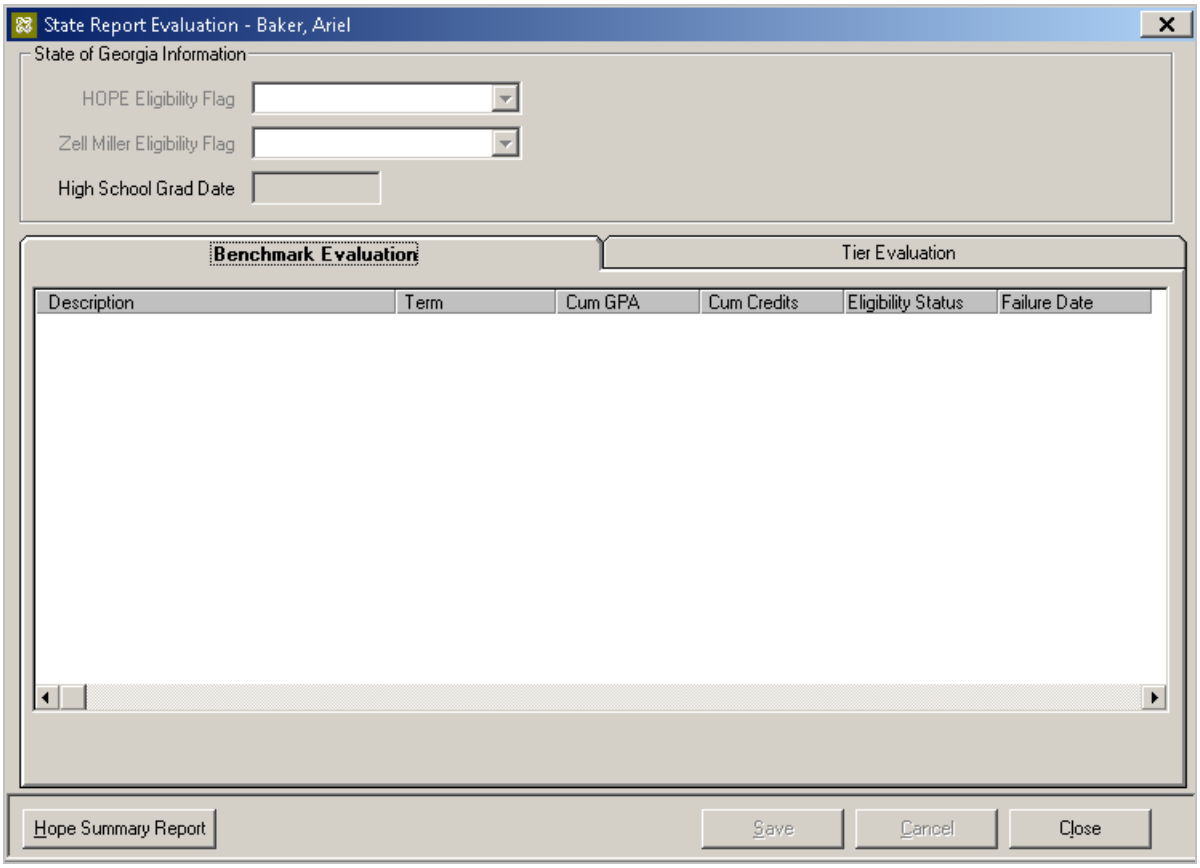
When the SULA flag is set to Y, a SAR comment code 267 will appear if a first time borrower student is subject to the subsidized loan limitation. The message directs users to the studentaid.gov site. This flag is viewed for all academic years but is only populated for the current award year. When the ISIR is received and the SULA flag is associated with a comment code, document triggers associated with the comment code are activated. The SULA flag is also displayed in the Financial Aid Packaging form.

State Report Evaluation

This form displays Benchmark/Tier evaluation results by matching state. The application currently supports the State Reporting Evaluations for the State of Georgia for the HOPE Grant/Scholarship and the Zell Miller Scholarship.

The evaluation of the HOPE and Zell Miller criteria is processed at an overall student level, so it crosses all enrollments and campuses for the student. When the scheduled job runs to evaluate the eligibility of the student for the Hope or Zell Miller scholarship, it uses the current date for the evaluation of the student, and it evaluates the benchmark values and tier configurations for each student by using the criterion that was configured into the Georgia State Configuration Tool. These values are updated every time the job evaluation runs, so it contains an accurate current reflection of the student.

This State Report Evaluation also takes into account Transfer students, wherein the job evaluates the transfer credits on active and inactive terms while evaluating benchmarks. The job evaluates the transfer credits that have been completed in the term by sorting the credits in order by the date completed of the course. The courses that fall within the appropriate months for the most recent year are then grouped together and the appropriate values are used to calculate a GPA value. If the evaluation of the Spring term benchmark is achieved with the transfer credits, the system calculates a GPA for the student, displays the Completion Date for the course, and then marks the term as Transfer. If a benchmark is not achieved within a registered term, the system will review the transfer credits on the student to evaluate if a benchmark 30, 60, or 90 is achieved.



At the top of the State Report Evaluation form appears the **State of Georgia Information** section, which contains the following fields:

- The **HOPE Eligibility Flag** field allows the user to select Yes or No from the available options. Likewise, the **Zell Miller Eligibility Flag** field allows the user to select Yes, No, or Undetermined from the available options. Users can also overwrite the HOPE Eligibility Flag and the Zell Miller Eligibility Flag values for the selected student. All modifications to the HOPE Eligibility Flag and the Zell Miller Eligibility Flag values are audited.

If the HOPE Eligibility drop-down is blank, then the selected student does not have a value populated from the import of the HOPE Eligibility Import files. Likewise, if the Zell Miller Eligibility drop-down is blank, the selected student does not have a value populated from the import of the Zell Miller Eligibility Import files.

Note: If the State Report Evaluation form is blank when it displays, the selected student's residence does not belong to Georgia or the Georgia State Configuration Tool is not configured for that school.

- The **High School Grad Date** field is a read-only field which shows the High School Graduation Date that was provided from the State of Georgia Import files for the student.

At the middle of the State Report Evaluation form are two tabs: **Benchmark Evaluation** and **Tier Evaluation**.

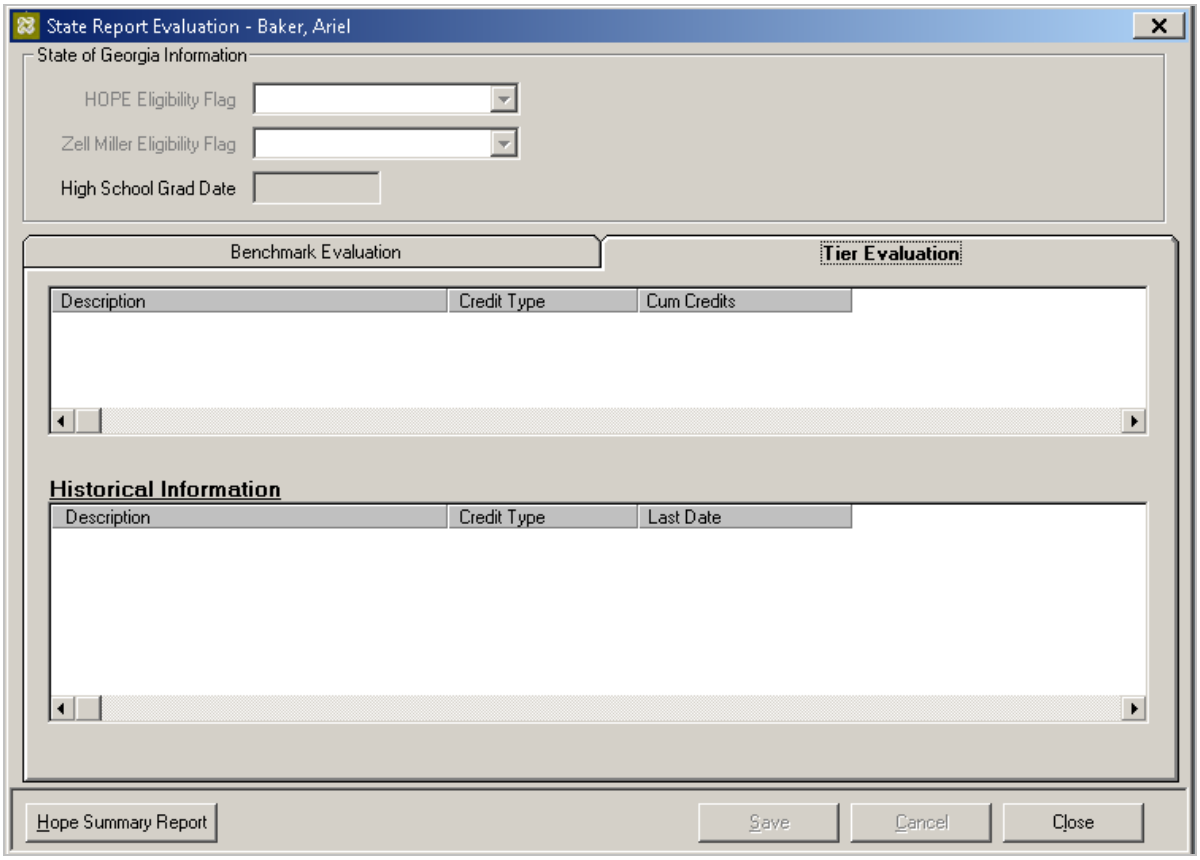
- The **Benchmark Evaluation** tab contains the Benchmark mapping results for each student. The Benchmark Evaluation tab contains a grid with six columns, including **Description, Term, Cumulative GPA, Cumulative Credits, Eligibility Status,** and **Failure Date**. The Eligibility Status and Failure Date columns refer to both the HOPE and Zell Miller fund sources. You can sort Benchmark evaluation data in the grid by clicking on any of the column headers.

  During the evaluation process the HOPE Evaluation Job will evaluate the minimum GPA from the fund source configuration as the minimum and compare it to the GPA value for the benchmark. If the GPA for the benchmark is greater than or equal to the minimum GPA value for each configured fund source, the student then passes. If the GPA for the benchmark is less than the minimum GPA for the fund source, then the student fails that benchmark. When a student fails a benchmark or the Eligibility Status is "Fail" and the student has a HOPE Scholarship or Zell Miller Scholarship on file, the system saves the term end date as the date the student failed the benchmark.

- The **Tier Evaluation** tab stores the Tiers Mapping results and Historical Information for each student. The Tier Evaluation tab contains two grids with three columns, including **Description, Credit Type,** and **Cumulative Credits** or **Last Date**. You can sort Tier evaluation data in either grid by clicking on any of the column headers.

The top of the Tier Evaluation tab displays the current calculated tier value for the student.

The bottom of the Tier Evaluation tab contains the **Historical Information** section, which displays the last date the student was evaluated at the indicated Tier before the student progressed to the next Tier.



The **Hope Summary Report** button opens the HOPE Summary Report for the corresponding student. The HOPE Summary Report contains eight columns, including First Name, Middle Initial, Last Name, Zell, Program Version, Student ID, School Status, and Award Year. The Zell column indicates if the student is eligible for the Zell Miller Scholarship.

The **Save** button updates the Hope Eligibility. The Save button is active if only a HOPE Eligibility Flag value is populated for update.

The **Cancel** button returns the form to its previous state. It does not update the Hope Eligibility value, if changed.

The **Close** button closes the form.

View > Student Accounts

The View > Student Accounts menu offers options related to financial matters for the student. The options on this menu apply to the student selected from the Recent Students list.

Menu Item	Description
Student	Displays the Student Master form.
Ledger Cards	Displays the student's ledger card. You can post charges to the student's account, post payments from fund sources, adjust transactions, and perform other financial procedures related to the student.
Payment Schedule	Displays the student's or third party's payment schedule. You can edit the payment schedule.
Stipend Schedule	Displays the stipend schedule for the student. You can edit the stipend schedule.
Revenue Ledger	Displays the student's revenue history and provides an option to enter revenue adjustments.
Hypothetical Refund Calculation	Displays calculations for return of Title IV funds for review purposes.
Refund Calculation	Displays a form used perform a revenue calculation for the student.
School Fields	Displays a form used to view or enter data in school-defined fields related to the Student Accounts module and public fields from other modules.
Summary	Displays a report in HTML format. The report provides a convenient way to view a snapshot of the student's financial history at the school.
Payment Info	Displays the form used to enter and store information on student bank accounts and credit cards.
Subsidiary	Displays the form used to view and enter subsidiary charges that do not affect the student's ledger card, e.g., housing fees.
Tuition Discounts	Displays the tuition discount policies available for the student and post discounts to the student's tuition charges.
Collections	Displays the collections policies available for the student.
Audit	Displays all collection activity for the student.
Registration Bill	Displays the Student Registration Bill containing a snapshot of student charges, financial, aid and payments for any selected term.

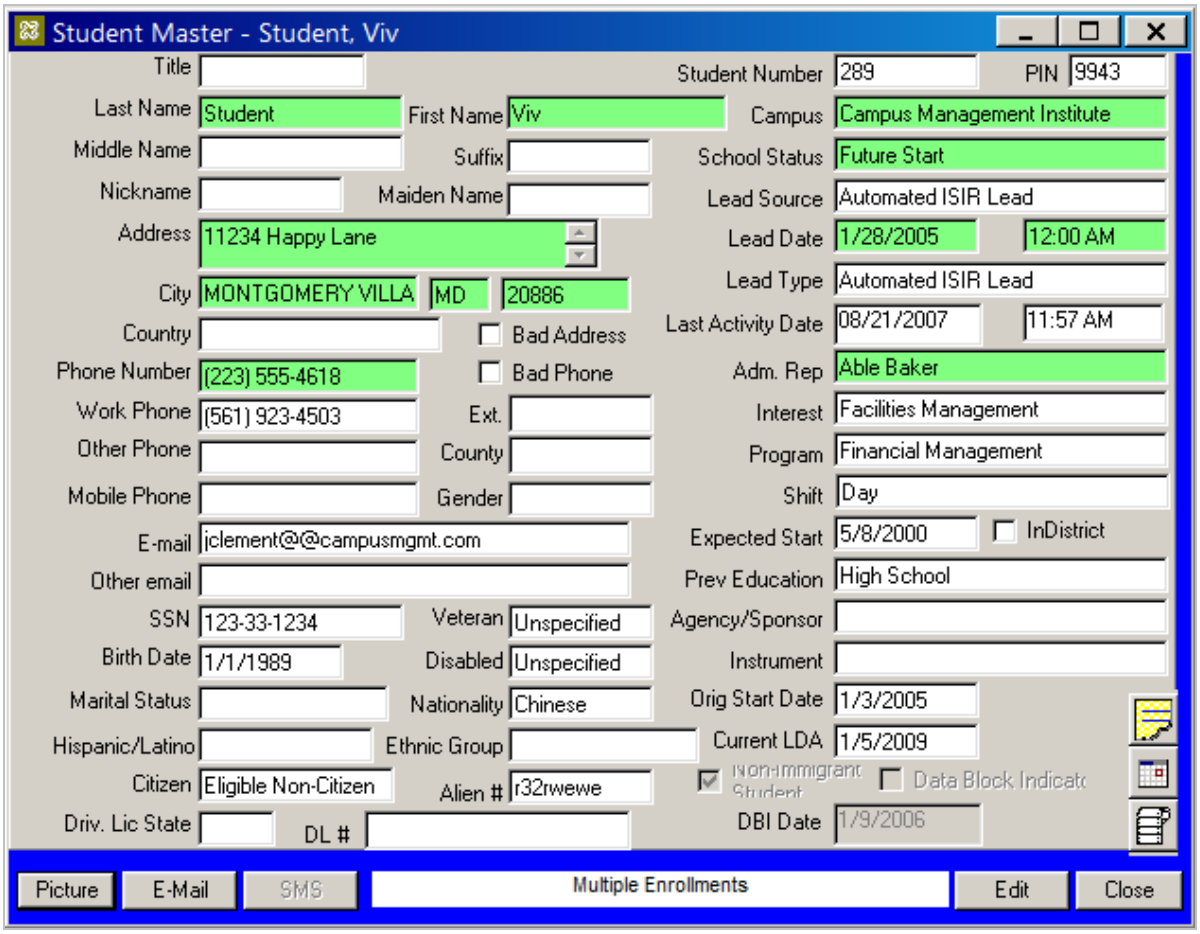
The options on the Student Bar are the same as the options on the View menu, unless the Student Bar has been altered by the user.

Student Master

The Student Master form contains much of a student's basic demographic information. The Student Master form is usually (but not necessarily) populated in the Admissions module by adding a new lead to the database. New leads are entered using the Quick Lead Entry form or the Add New Lead **Ctrl+L** option on the File menu. The **Ctrl+N** key combination can also be used to start a new Student Master record (form) without entering a quick lead.

To view a Student Master form:

1. Select one of the following options:
    - Click **Student** on the Student Bar.
    - Double-click **Recent Students** on the Toolbar. When you change the student in the Recent Students list, a new Student Master form is displayed. If you already have a Student Master form open, it remains open in the background.
    - From the **View** menu navigate as follows:
        - Contact Manager > Student
        - Admissions > Student
        - Financial Aid > Student
        - Student Accounts > Student
        - Academic Records > Student
        - Career Services > Student
        - Loan Management > Student
        - Student Services > Student
        - Housing > Student
    - Use the **Find** menu or click on the Toolbar to search for a student.



Note: The border color around the Student Master form indicates the student's status category. In the setup options under Setup > Status Codes > Colors Tab, your system administrator can choose colors for the status categories.

2. Multiple Student Master forms can be displayed at the same time. The forms always open in the same place in the work area. Unless you have closed, moved, or minimized a previous Student Master form, the next form you open covers the previous form.

   To move between open Student Master forms use the **Window** menu and select **Tile** or **Cascade** to organize all open forms in the work area.

   When you are working with multiple students, ensure that the correct form is current (active). The name of the current student is always shown in the Recent Students text box. The title bar of the active form is always a different color than other forms which may be open in your work area.

3. To edit the information on the form, click **Edit**. See Edit a Student Master.

   Required fields on the form have a background color other than white. If a required field is blank, you must enter data in it when you edit the form, even if you did not intend to provide the information when you clicked Edit.

   Some fields are required by CampusNexus Student (Last Name, First Name, Lead Date, Admissions Rep). Additionally, your institution may designate other fields as required. The system administrator can mark fields as required in either of two ways.

- Open any Student Master (or Quick Lead) form and go to Setup > Required Fields.
- Designate the field as required in the Data Dictionary.

4. To add an activity from the Student Master form, click the **Add Activity** icon at the bottom right of the form. The Activity form is displayed.
5. Click **Close** (Ctrl+F4) to close the active Student Master form. If you are in edit mode when you click Close, you are prompted to save any changes.

Duplicate Student Records

CampusNexus Student checks for duplicate Student Master records when new leads or students are added. The following table columns are used to check for duplicates:

- Student ID
- Social Security Number
- Phone Number
- Date of Birth and Student Name (combined)
- Driver's License Number
- E-mail address.

Each check is performed only if you entered data in the corresponding field. If at least one match is found, a grid showing the matches is displayed

If the lead is a duplicate and can be found on the grid, click the record and the lead form is populated with the information for that lead. The information can then be edited. The campus for the lead can be changed only if the campus ID for the record from the grid is in the list of campuses to which you have access.

Ledger Cards

You can view the student's ledger card or print a report with the ledger information. You can also post charges, payments, or adjustments. By default the current enrollment is displayed when accessing the Ledger Card form.

If the Posting Flag is set to *Current Campus*, the Post Payment, Post Charges, Adjust Transaction, Apply Payment, and Post Refund buttons are enabled only when the enrollment selected is in the campus you are signed into. If the Posting Flag is set to **Any Campus**, you can post transactions for a student at any campus.

Entries on the ledger card display the campus code from which the entry was billed. Options on the ledger card report allow for sorting and subtotalling by campus.

Note: If your institution uses a servicer for processing FA, whether a payment is scheduled or not, CampusNexus Student prevents users from posting individual Title IV payments if the setup option **Prevent Users from modifying Title IV aid?** is set to Yes.

The TUIT code must be used to bill tuition via Registration Billing. Unless an unbilled TUIT item appears in a student's Fees folder, the student will not be gathered in the list of students to bill. The TUIT code must not be used as a tuition discounts bill code.

Integration with CampusNexus Finance, HR & Payroll

Ledger Cards in CampusNexus Finance, HR & Payroll

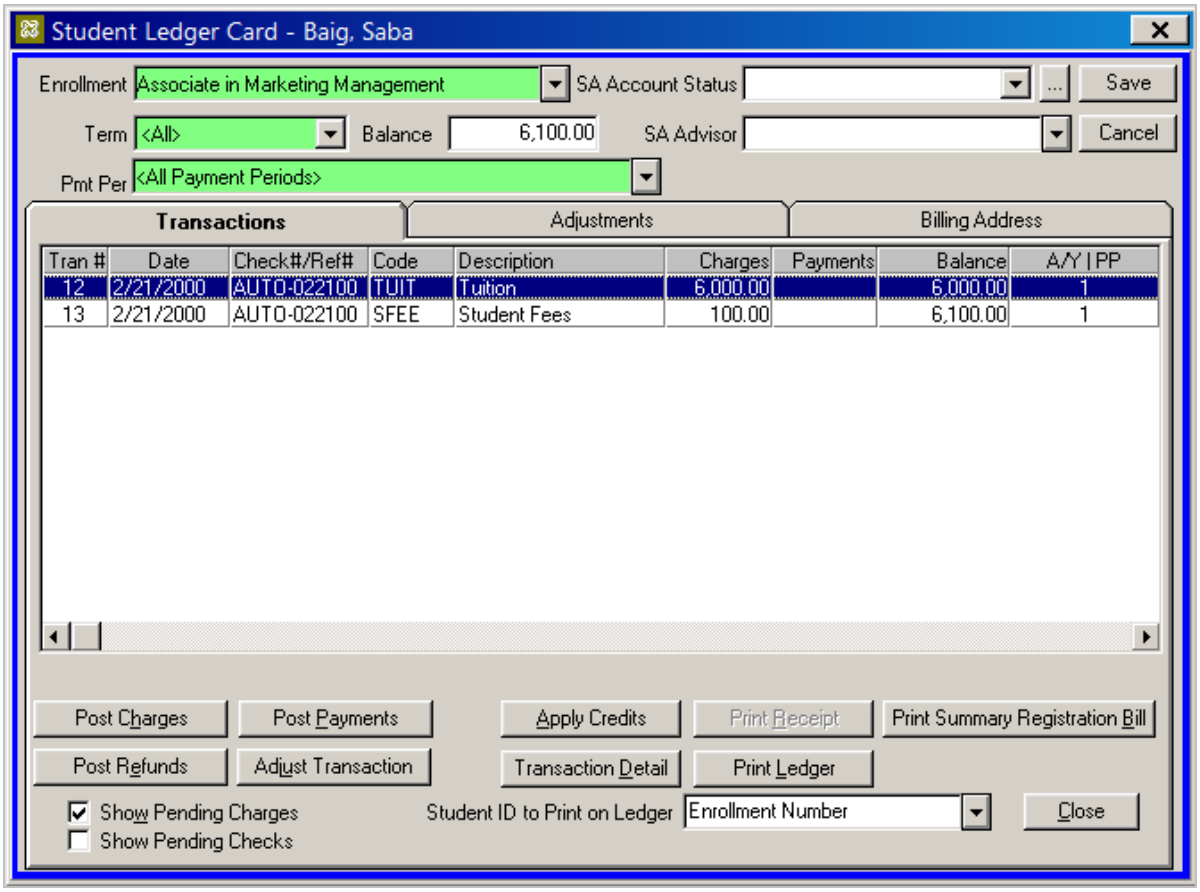
CampusNexus Student maintains the following ledgers:

- Main Ledger (charges, refunds, stipends, payments and related voids)
- Subsidiary Ledger(charges, refunds, payments and related voids)

CampusNexus Finance, HR & Payroll has only one ledger (Student Ledger) that shows the transactions from all CampusNexus Student ledgers and thereby includes all balances for calculating the ledger balance. In version 2.1 and later, CampusNexus Finance, HR & Payroll provides a filter that allows the user to view each of the CampusNexus Student ledgers separately. The default view is the Main Ledger. CampusNexus Finance, HR & Payroll calculates the balances depending on the selected ledger so that the balances can be reconciled with the separate ledgers in CampusNexus Student.

To view or print the ledger card:

1. Select the student whose ledger card you want to view.
2. Navigate to **View > Student Accounts > Ledger Cards**. The Student Ledger Card form is displayed. The default value in enrollment drop-down list is the student's current enrollment record.



3. To reduce the number of transactions to be viewed, select a specific **Enrollment** and/or a specific **Term**. You can change the order of transactions by clicking the column headers.

4. The **Pmt Per** list is displayed only when the **Pmt Per** column is available. Use this option to filter by payment period so that the number of viewable transactions is reduced. The fields displayed in this drop-down box are Academic Year (Ac Yr), Payment Period (Pmt Per), Program Version, and the Payment Period start and end dates.

   Note: When billing a student by Payment Period, it is possible for the payment period on posted charges to be automatically adjusted to another payment period based on the student's progress. For example, if a student receives a grade for a course where the student does not earn credits, CampusNexus Student adjusts the payment period dates to include the next course(s) that would potentially complete the credit value required for that payment period. The charges for those courses will then also be associated with that payment period and posted to the ledger card if the payment period has attendance posted during that time frame. If the grade for the course is later changed to a grade that does earn credits, CampusNexus Student adjusts the payment period dates back to the end date of the course that completes the credit value of the payment period and then change the payment period association on the ledger entry with the payment period that encompasses that course.

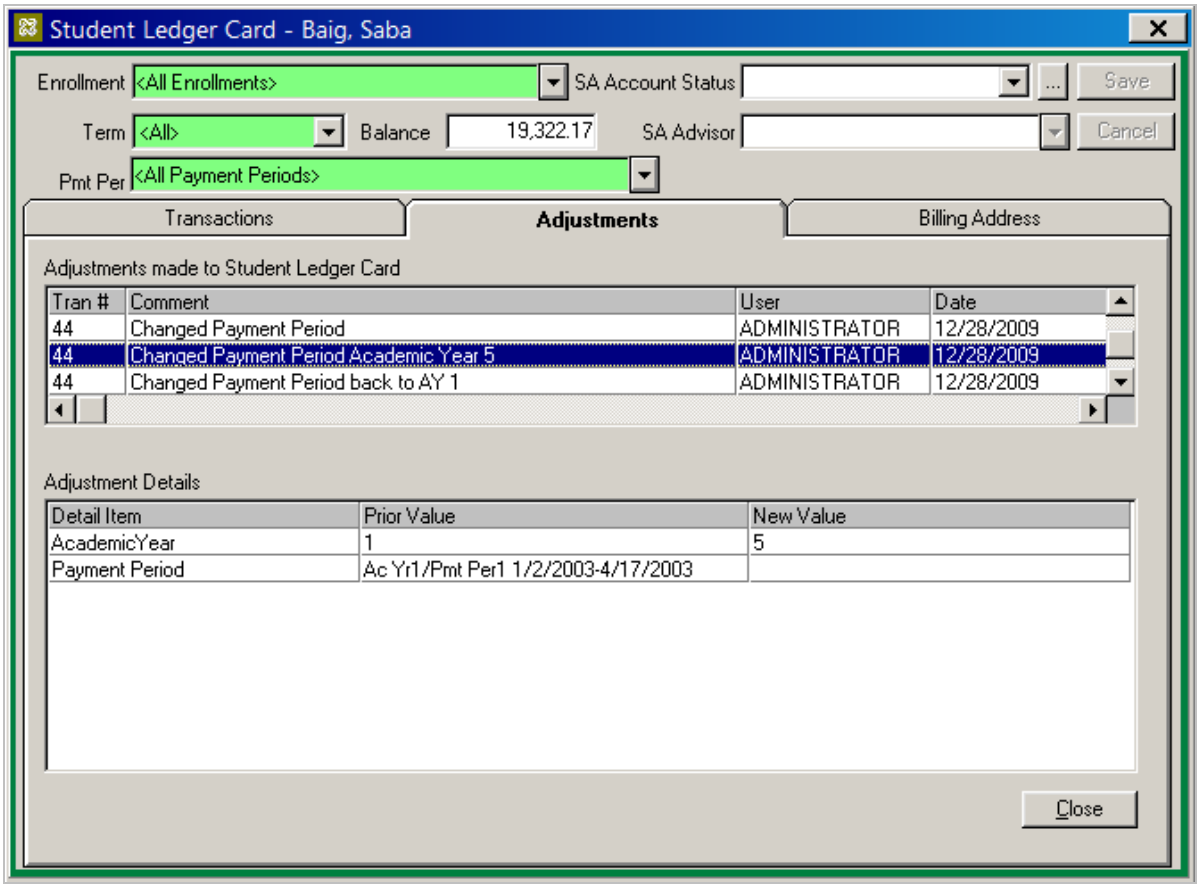
   The above changes only occur if the student billing method frequency is Payment period and users are posting using Transaction Details. The automated changes also require that the system administrator has configured the SQL jobs for these processes.

5. In the **SA Account Status** field, select account statuses that apply to this student. The statuses that appear here are determined by the selection you made in the Setup - Student Accounts Lists [Accounts Statuses] form. If you selected the *Account Statuses* check box, only the account statuses will appear. If you selected the **Both** check

box, the Collections and Account statuses will appear.

Staff Members must be granted permission to edit the SA Account Status field. The Save button is disabled if the staff member does not have these permissions.

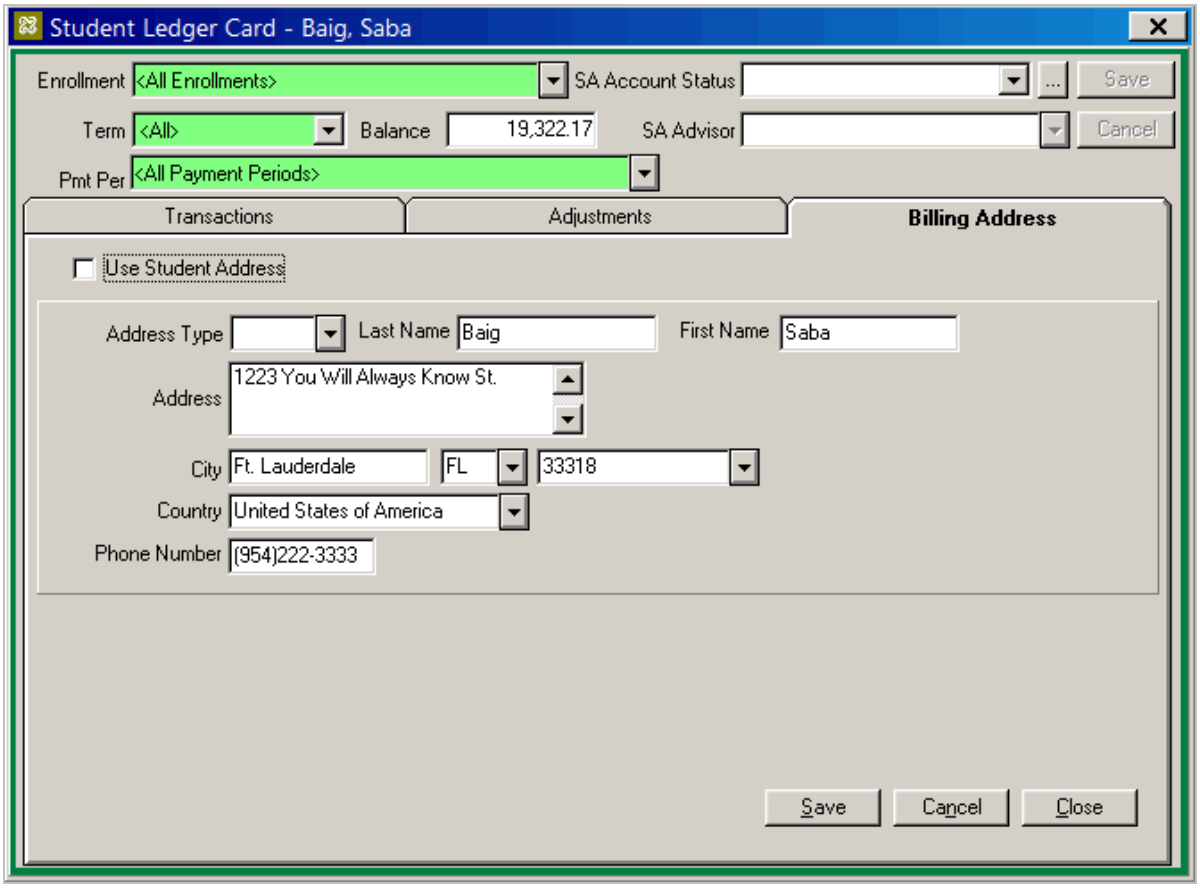
6. The student's **Student Accounts Advisor** for the enrollment is displayed. The advisor is enrollment-specific. If you have you have been granted the necessary authority, you can change the advisor by selecting one from the drop-down list.
7. Click the **Transactions** tab to view a list of all transactions within the selected enrollment.
8. Click the **Adjustments** tab to view a record of all transaction adjustments made through Adjust Transactions.



   a. In the **Adjustments made to Student Ledger Card** list, select the transaction you want to view.
   b. View **Adjustment Details** for the record of the adjustment transaction you selected.

9. Click the **Billing Address** tab to view or change the student's billing address. CampusNexus Student provides for a billing address other than the address on the student's master record. You can select an address from Contact Manager's list of addresses and designate it as the billing address or enter an address on the Billing Address tab of the Ledger Card. The billing address is added to the list of addresses for the student and labeled as the 'Billing Address'.

   If a billing address has already been designated for the student, the address is displayed on the Billing Address tab.



a. If accounts receivable statements are to go directly to the student, select **Use Student Address**.

b. If the billing address is missing or incomplete, enter it in the Addresses form.

c. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

When statements are printed, CampusNexus Student checks for a billing address to be printed on the statements. If no billing address is found, the address from the Student Master form is used.

10. Click **Post Charges** to post debit transactions for the selected student. After adding a payment or charge, the ledger card is refreshed and displays the new entry. Any charge to the ledger card acts as a trigger for CampusNexus Student to perform stipend calculations based on the charge made. If any ACH/Credit Card charge is posted through Process Electronic Draft, CampusNexus Student can generate an auto stipend for any charge per its configuration. Additionally, when creating an auto stipend all charges are used instead of only Title IV charges. Prior period charges are also adjusted when the "Allow up to $200 FSA for prior charges" option is turned ON and a Title IV payment exists under the current payment period. For more information on calculations, see Stipend Schedule.

11. Click **Post Payments** to post credit transactions for the selected student. Note that any payment made to the ledger card acts as a trigger for the system to perform stipend calculations based on the payment made. If any ACH/Credit Card Students Payment is posted through Process Electronic Draft, CampusNexus Student can generate an auto stipend for any payment per its configuration. For more information on calculations, see Stipend Schedule.

12. Click **Post Refunds** to post refund transactions for the selected student.

13. Select a payment transaction and click **Print Receipt**.

CampusNexus Student prints the generic three-part receipt or the FA Notification of Receipt, depending on the type of payment received.

The Print Receipt button on this form generates a generic receipt for the currently selected transaction on the Ledger Card. The Student Accounts Ledger form provides for printing the *Notification of Receipt for a received FA disbursement*. If the selected transaction on the Ledger Card is an FA disbursement received, and the FA fund source type is not CASH, the corresponding Notification of Receipt is printed.

To determine which Notification of Receipt report should be loaded when this option is selected, CampusNexus Student first checks for the existence of a receipt report for the fund source received. If cst_FaXXXXXXXXReceipt exists (XXXXXXXX = Fund Source code), that report will be loaded. If cst_FaXXXXXXXXReceipt does not exist, CampusNexus Student looks for cst_FaDefaultReceipt. If it does not exist, lst_FaDefaultReceipt will be loaded. After the receipt is printed for the selected transaction, CampusNexus Student updates FaDisb.DateReceiptPrinted with the system date.

14. Click **Print Ledger** to print a report of the ledger data. When printing a Ledger Card Report for a specific enrollment, the status of the student in the enrollment is selected for the report. When you print the ledger for *All Enrollments*, CampusNexus Student prints the current (most recent) status on the report.

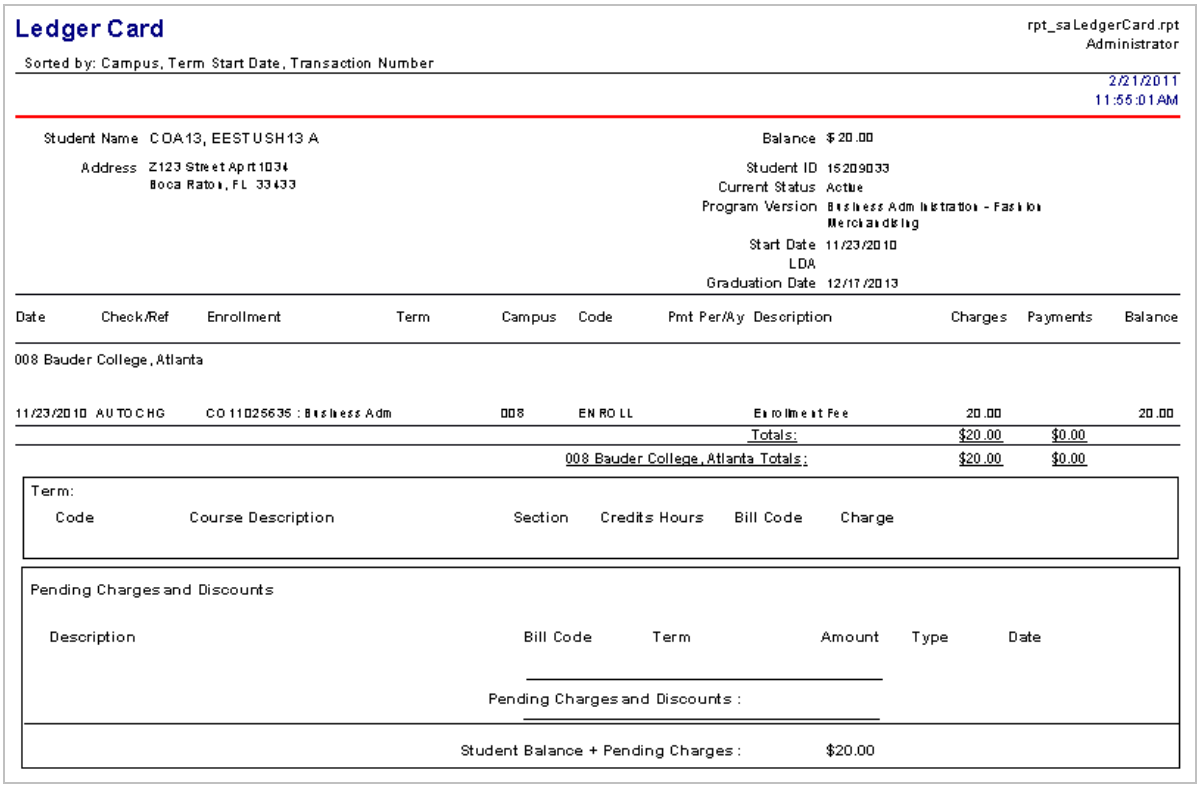
    The Report Selection: Ledger Card form is displayed. The sort parameters include Campus, Academic Year, Term, (Term) Start Date, Enrollment Number, Transaction Code, Transaction Date, and Transaction Number. On the Selection tab, select SSN, Student Number, Enrollment Number, or No ID to be printed on the ledger card report.

    When Print Ledger is clicked on the Ledger Card form, the Ledger Card can be listed showing all enrollments as one Ledger Card, or the Ledger Card can be separated by enrollment. You can specify how the ledger card is listed. Specify sort criteria before printing the ledger card.

    Printing Pending Discounts

    To print pending discounts, select **Show Pending Charges** and click **Print Ledger**. The Report Selection: Ledger Card form is displayed. Select *Yes* for *Include Course Detail* and *Pending Charges*. Click **Preview**.

    If pending discounts are available, they will appear in the Pending Charges and Discounts section on the Ledger Card.



Ledger Card

rpt_saLedgerCard.rpt
Administrator

Sorted by: Campus, Term Start Date, Transaction Number

2/21/2011
11:55:01 AM

Student Name COA13, EESTUSH13 A
Address Z123 Street Aprt1034
Boca Raton, FL 33433

Balance $20.00
Student ID 15209033
Current Status Active
Program Version Business Administration - Fashion Merchandising
Start Date 11/23/2010
LDA
Graduation Date 12/17/2013

Date	Check/Ref	Enrollment	Term	Campus	Code	Pmt Per/Ay	Description	Charges	Payments	Balance
008 Bauder College, Atlanta										
11/23/2010	AUTOCHG	CO11025635 : Business Adm		008	ENROLL		Enrollment Fee	20.00		20.00
							Totals:	$20.00	$0.00	
							008 Bauder College, Atlanta Totals:	$20.00	$0.00	

Term:

Code	Course Description	Section	Credits Hours	Bill Code	Charge

Pending Charges and Discounts

Description	Bill Code	Term	Amount	Type	Date
Pending Charges and Discounts :					
Student Balance + Pending Charges :			$20.00		

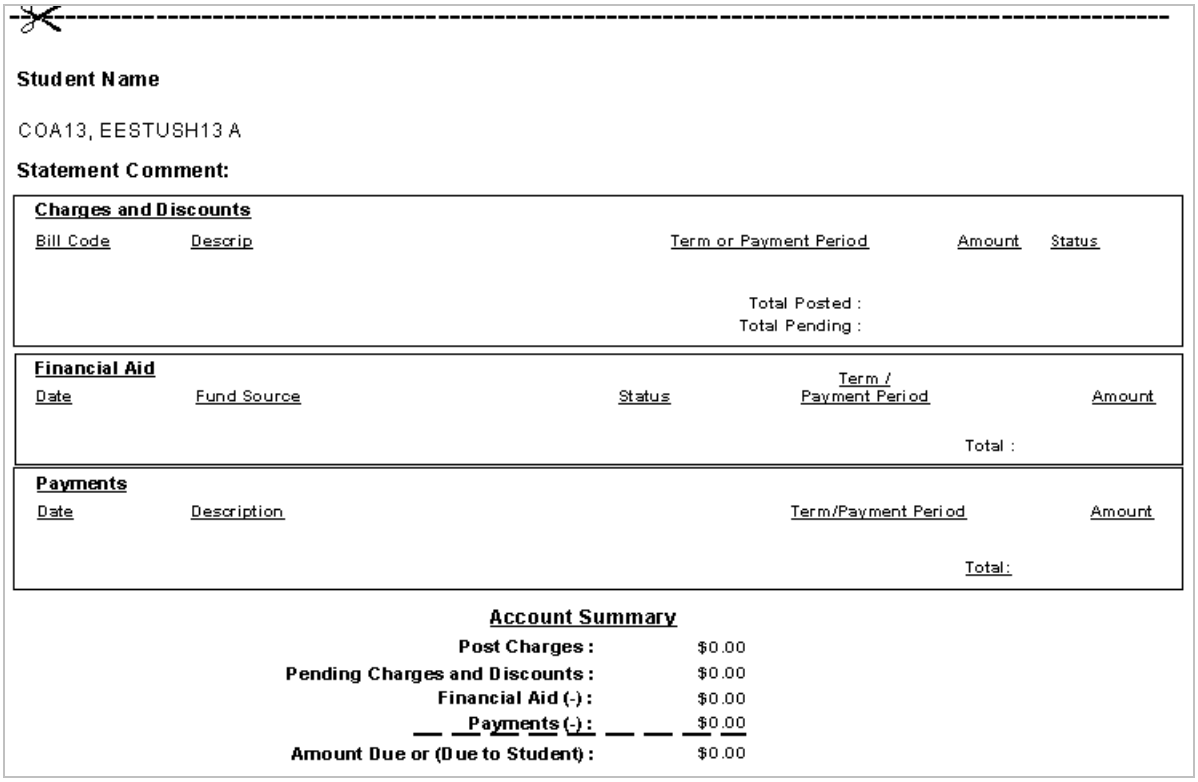
15. Click **Print Registration Bill** to print the registration bill. When printed from the ledger card, the expected funding is printed for the single term selected. The report reflects the individual student using the registration bill defaults setup for the campus and the single term selected by the user on the student ledger card. If the campus default is set up to print expected funding through a particular term, CampusNexus Student uses the term specified by you on the ledger card or schedule folder as the expected funding term.

    A sub-report is appended to the registration bill if the ledger card activity option is selected as a registration bill default print option and the ledger card transactions meet the following criteria:

    - Belong to the enrollment for which the report is being run and
    - If the transaction associated with a term is one of the Billing Terms selected and
    - If the transaction is not associated with a term and its transaction date falls within the range of start and end dates for the Billing Terms selected

    Note: If both Summary Registration Bill and Detail Registration Bill were configured in Registration Bill Defaults, a pop-up menu is displayed when you click Print. If only the Summary option or only the Detail option was configured in the default settings, the Print button caption is **Print Summary Registration Bills** or **Print Detail Registration Bills**, respectively.

    In the Detail Registration Bill, if pending discounts are available, then you can view them in the Charges and Discounts section and in the Account Summary in the line item Pending Charges and Discounts.



Student Name

COA13, EESTUSH13 A

Statement Comment:

Charges and Discounts

Bill Code	Descrip	Term or Payment Period	Amount	Status
		Total Posted :		
		Total Pending :		

Financial Aid

Date	Fund Source	Status	Term / Payment Period	Amount
			Total :	

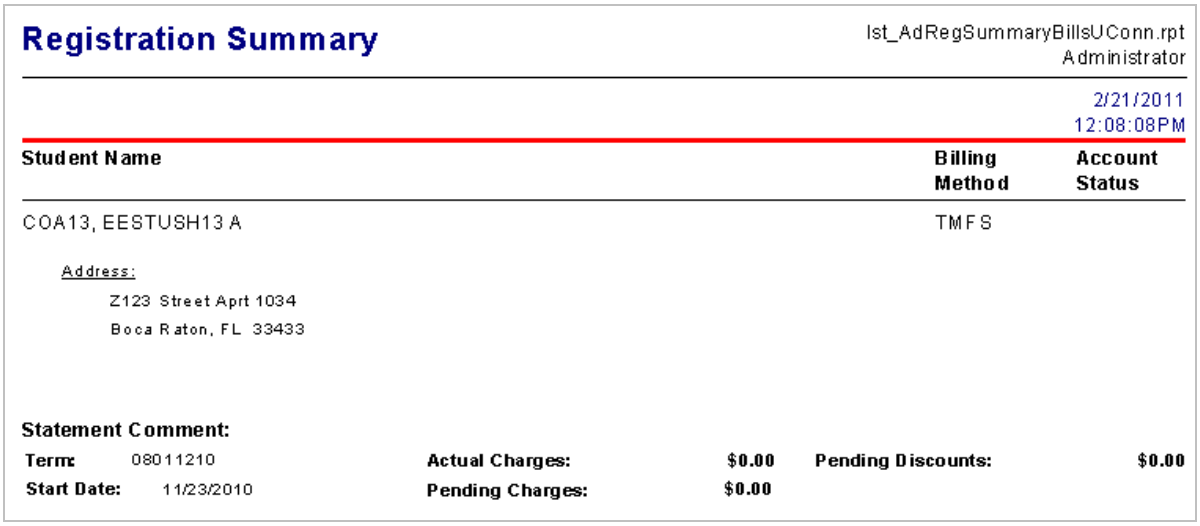
Payments

Date	Description	Term/Payment Period	Amount
		Total:	

Account Summary

Post Charges :	$0.00
Pending Charges and Discounts :	$0.00
Financial Aid (-) :	$0.00
Payments (-) :	$0.00
Amount Due or (Due to Student) :	$0.00

In the Summary Registration Bill, you can view a sum of the pending discounts in the Pending Discounts line item if pending discounts are available.



Registration Summary

lst_AdRegSummaryBillsUConn.rpt
Administrator

2/21/2011
12:08:08PM

Student Name	Billing Method	Account Status
COA13, EESTUSH13 A	TMFS	

Address:
Z123 Street Aprt 1034
Boca Raton, FL 33433

Statement Comment:

Term:	08011210	**Actual Charges:**	**$0.00**	**Pending Discounts:**	**$0.00**
Start Date:	11/23/2010	**Pending Charges:**	**$0.00**		

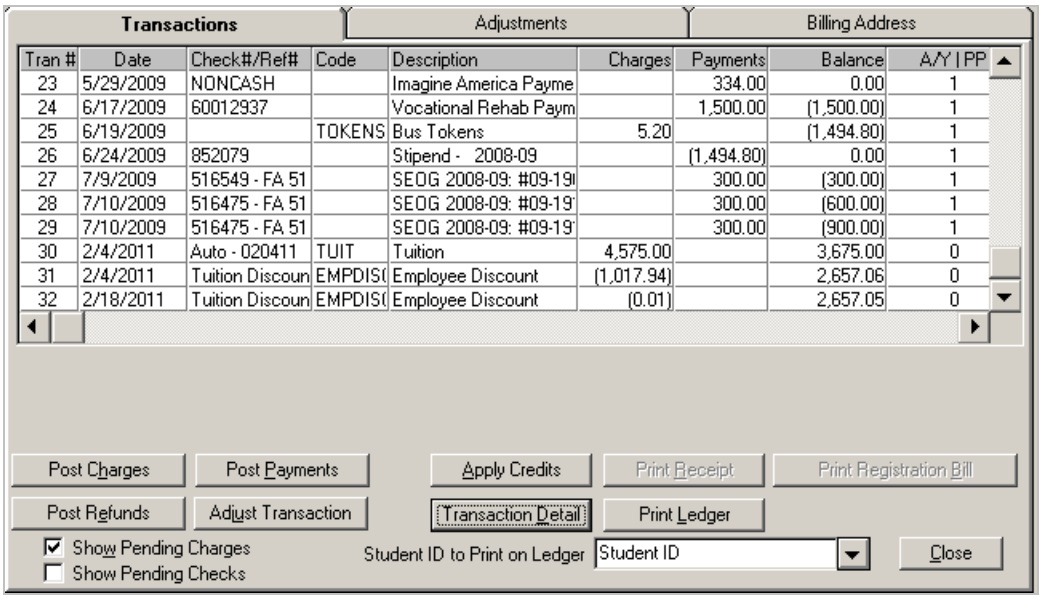
16. Click **Adjust Transaction** to change a transaction on the student's ledger card or change the check number entered.

    Note: When CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll, the check printing functionality is disabled in CampusNexus Student and checks are printed from CampusNexus Finance, HR & Payroll. The *Date* and *Check#/Ref#* fields in the Transactions tab will reflect data returned from Cam-

pusNexus Finance, HR & Payroll and cannot be changed in the student's ledger card. For more information, see Stipend and Refund Check Printing (CampusNexus Finance, HR & Payroll).

17. Select **Show Pending Charges** to see charges resulting from schedule changes made between the time the student was originally billed for a term and the add/drop period for that term.

    Pending discounts, if available, are calculated based on the pending charges. Pending discounts are displayed in the (Course) Description column on the Transactions ledger, with the Discount Policy Code, and Check#/Ref#, if applicable, when **Transaction Detail** is clicked.



    Note: When CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll, the check printing functionality is disabled in CampusNexus Student and checks are printed from CampusNexus Finance, HR & Payroll. Select **Show Pending Checks** to view the checks that are printed from CampusNexus Finance, HR & Payroll. For more information, see Stipend and Refund Check Printing (CampusNexus Finance, HR & Payroll).

18. Click **Apply Payment** to apply a payment to specific charges. If your campus is configured for Auto Apply Using Hierarchy, this button is labeled Apply Credits.

19. Double-click a transaction or select it and click **Transaction Detail** to see detailed information about the transaction. The Transaction Detail form is displayed.

20. If the entry has not been posted to the General Ledger, you can edit the **Bill Code** and the **Description** on the Transaction Detail form. This change capability can be useful in cleaning conversion data during the start-up of the system.

21. If you change the bill code or the description, click **Save**. CampusNexus Student displays a confirmation message.

22. Click **Close** to close the form. You are returned to the ledger card.

Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

Ledger Cards Form - Field Level Security

To set Field Level Security for the form, leave the Ledger Cards form displayed, and select Setup > Field Level Security. Set the field level security for the fields in the Ledger Cards form.

Adjust Transaction

Sometimes it is necessary to change transaction data on the student's ledger card after it has been posted. CampusNexus Student provides a means to do this, but certain limitations apply:

- You cannot change a transaction once it has been extracted for posting to the general ledger in your accounting system.
- You can move transactions to another enrollment only if the transaction has not been released to the general ledger.
- You cannot change a transaction if the date of the original transaction is prior to the period start date (Minimum Transaction Date). See also Campus Accounting, Release to General Ledger, and Release to Integrated Accounting System.

CampusNexus Student maintains a record of the changed transaction. You can review the adjustment record on the Adjustments tab of the ledger card.

If a loan amount field is edited and updated, the corresponding row in the Direct Loan Disbursements table is updated with the change. CampusNexus Student finds the row in the table and calculates the new disbursement gross amount, net amount, and fees.

CampusNexus Student can update the Direct Loan disbursement file when adjusting the amount of a previously posted Direct Loan disbursement or deleting a previously posted Direct Loan disbursement from a student's ledger card. If the disbursement has been sent to COD, CampusNexus Student prevents the Direct Loan disbursements from being edited or deleted.

CampusNexus Student enables you to modify check amounts and check numbers in the transaction history grid on the Ledger Card.

See also Deactivated fund source for an award year and campus.

Integration with CampusNexus Finance, HR & Payroll

When CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll, the following applies:

- The check printing functionality is disabled in CampusNexus Student and checks are printed from CampusNexus Finance, HR & Payroll. The Date and Check#/Ref# fields in the Transactions tab reflect data returned from CampusNexus Finance, HR & Payroll and cannot be changed in the student's ledger card. For more information, see Stipend and Refund Check Printing (CampusNexus Finance, HR & Payroll).
- Transactions cannot be adjusted in CampusNexus Student after Release to Integrated Accounting System. This ensures that student ledger transactions in CampusNexus Student remain synchronized with the transactions in CampusNexus Finance, HR & Payroll.
- Transactions that were released but not posted in CampusNexus Finance, HR & Payroll are marked with an asterisk in the Check#/Ref# column. The following message is displayed if the user tries to adjust the transaction: *"Transaction has been released to G/L but not posted."*
- Handling of negative amounts when CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll:
    - When Ledger charges or Subsidiary charges are created or edited in CampusNexus Student with a negative amount, the Debit and Credit Accounts are reversed for the transaction.
    - When payments (Ledger and Subsidiary), refunds (Ledger and Subsidiary), or miscellaneous receipts are created or edited in CampusNexus Student, negative amounts cannot be entered.
- Voiding transactions when CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll:

- Checks posted directly to the Student Ledger can be voided from CampusNexus Finance, HR & Payroll.
- CampusNexus Student no longer provides an option to void transactions for which checks were issued from CampusNexus Finance, HR & Payroll.
- Checks issued from CampusNexus Finance, HR & Payroll can be voided from CampusNexus Finance, HR & Payroll. CampusNexus Student is updated in real time (no waiting for posting) when the void occurs in CampusNexus Finance, HR & Payroll.

  Note: Unposted transactions cannot be voided.
- CampusNexus Finance, HR & Payroll creates a second voucher upon void of the original check and updates the student ledger in CampusNexus Finance, HR & Payroll to reflect the void.
- CampusNexus Finance, HR & Payroll sends an indicator to inform CampusNexus Student if the void is without a re-issue or a new check is re-issued.
- If a check is re-issued after a void, CampusNexus Finance, HR & Payroll sends the update to CampusNexus Student. To reflect the void with a reissue, two new transactions are created in CampusNexus Student. One indicates the void, the other transaction shows the Check# as 0, marks the transaction a Pending Check, and ensures it is in unposted state.

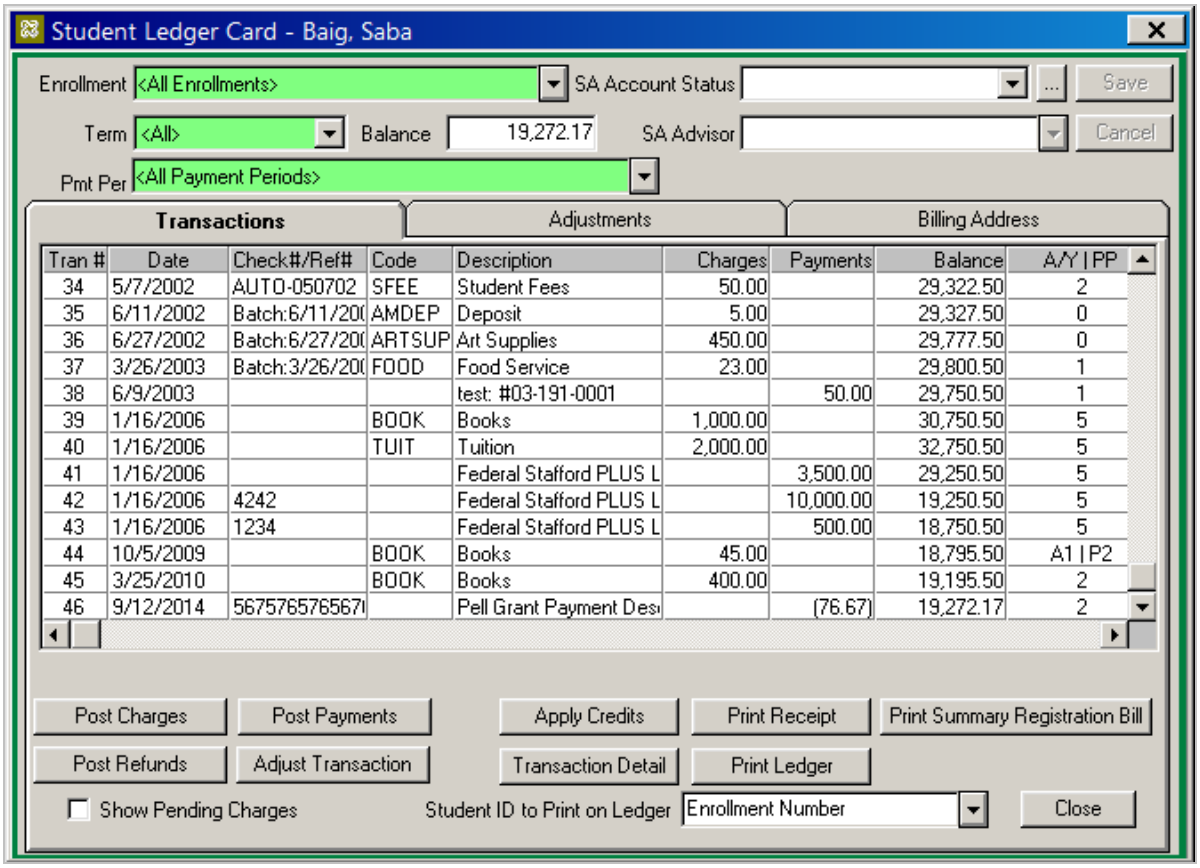
  CampusNexus Student ensures that such a transaction does not appear in the Process Refund/Stipend wizard. The transaction in CampusNexus Student with Check# 0 is updated such that it includes the new Check#, is no longer marked as a Pending Check, and is displayed as a posted transaction.
- CampusNexus Student displays a void transaction that was initiated in CampusNexus Finance, HR & Payroll the same way it currently does when the void is initiated from CampusNexus Student.
- The option to void a Refund/Stipend check is disabled in CampusNexus Student so that the Finance Department that issued the check retains control of voiding the checks.
- Voids initiated from CampusNexus Finance, HR & Payroll are logged in the change history log in CampusNexus Finance, HR & Payroll and CampusNexus Student. The audit report in CampusNexus Finance, HR & Payroll reports voids performed via CampusNexus Finance, HR & Payroll.

- The Returned Check option is disabled in CampusNexus Student when integrated with CampusNexus Finance, HR & Payroll. The workaround is the Void functionality. Any charge as part of a non-sufficient fund (NSF) transaction needs to be a manual charge.

Note: When an award is reassigned, the new Academic Year Start Date and End Date are updated against every transaction in CampusNexus Finance, HR & Payroll. Since this is non-financial data, the updates will occur even for posted transactions.

To adjust a transaction:

1. Select a student.
2. Navigate to **View > Student Accounts > Ledger Cards**. The student's ledger card is displayed.



3. Select the transaction to be changed and click **Adjust Transaction**. Depending on the selected transaction, one of the following forms is displayed:

   - Void/Refund Stipend Check
   - Transaction Adjustment
   - Adjust Payment

   If there is any reason why you cannot adjust the transaction, a message is displayed.

4. Complete any required fields and select the appropriate button.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.
6. After a transaction has been changed, you can see the record of the change by clicking the Adjustments tab on the Ledger Card form.

Void Refund/Stipend Check

Note: When CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll, the Void Refund/Stipend Check option is disabled.

CampusNexus Student allows a refund or stipend check to be voided or modified. When you select Adjust Transaction on the Student Legder Card, if the transaction is a refund/stipend transaction (negative payment), CampusNexus Student displays the Void Refund/Stipend Check form with the transaction details including description, check number, date, etc.

The staff member's permissions determine which adjustment types are enabled.

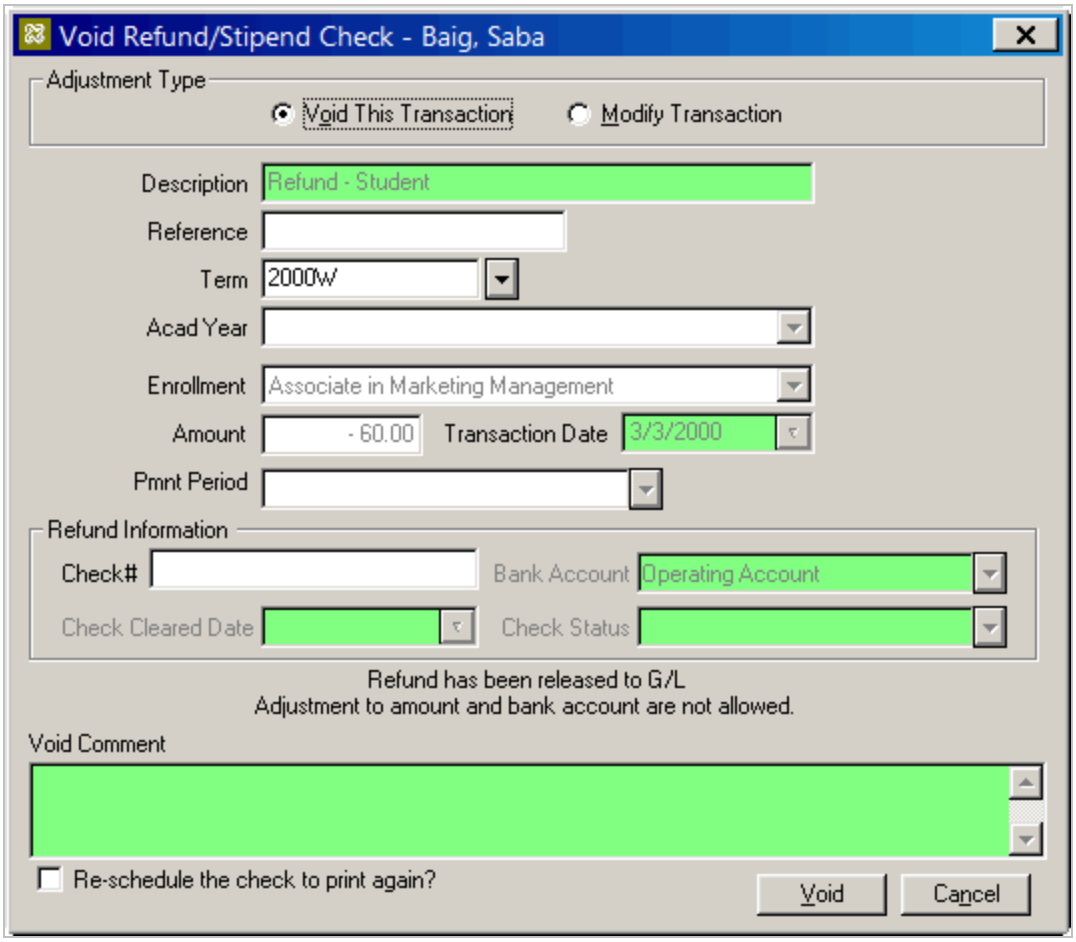
- Void This Transaction is enabled only if the staff member has Void Refund/Stipend permissions.
- Modify Transaction is enabled only if the staff member has Edit Paid Refund/Stipend permissions.

On the Campus Information form (Setup > Campus Locations > Edit (Accounting tab), the Prohibit Void of Cleared Refund and Stipend Checks when option controls whether staff members can void a refund or stipend check if the check status is Cleared.

A check is considered to be Cleared if:

- Check cleared date is not blank;
- Check status is Cleared; or
- Check cleared date is not blank and check status is Cleared.

When you select a refund or stipend from a student's ledger card and click Adjust Transaction, CampusNexus Student checks if the check is cleared. The determination of whether the check is cleared is based on the definition assigned in the campus configuration (i.e., the three conditions noted above). If you choose to adjust a refund or stipend check that is cleared, the **Void This Transaction** button is disabled on the Void Refund/Stipend Check form.



Void This Transaction

a. On the Void Refund/Stipend Check form, select **Void This Transaction**.

b. Enter the required **Comment**.

c. Select or clear **Re-schedule the check to print again?** as required.

d. Click **Void**. The following updates occur:

- A new entry is added to the student's ledger card that reverses the refund/stipend transaction. The Reference for the new transaction is 'VOID'.
- The original transaction is modified to indicate that the check has been voided. This prevents the check from being voided a second time.
- The original transaction information is written to the Adjustments table.
- If the original refund was from a scheduled source of aid, the amount refunded is updated to indicate that the check was voided.
- If you choose to void the check and not reschedule the refund, the refund is marked with a status of 'V - Void'.
- If you choose to reschedule the refund check to print again, the status on the refund check is set to 'N - Not printed'. The check will be printed the next time the Process Refunds/Stipends wizard is run.

Note: When voiding a Direct Loan refund, if Auto create Loan Period Orig. Changes when student Withdraws or Refund is posted? is activated, any pending origination changes created or updated during the refund posting are deleted upon the voiding of the refund.

Modify Transaction

a. On the Void Refund/Stipend Check form, select **Modify Transaction**.

b. Change the **Description**, **Reference**, **Term**, **Check #**, and/or **Academic Year** values.

c. In the **Check Date** field, select a date that the check status was assigned.

d. In the **Check Status** field, select a status The options are:

- Cleared
- Unclaimed
- Sent
- Void

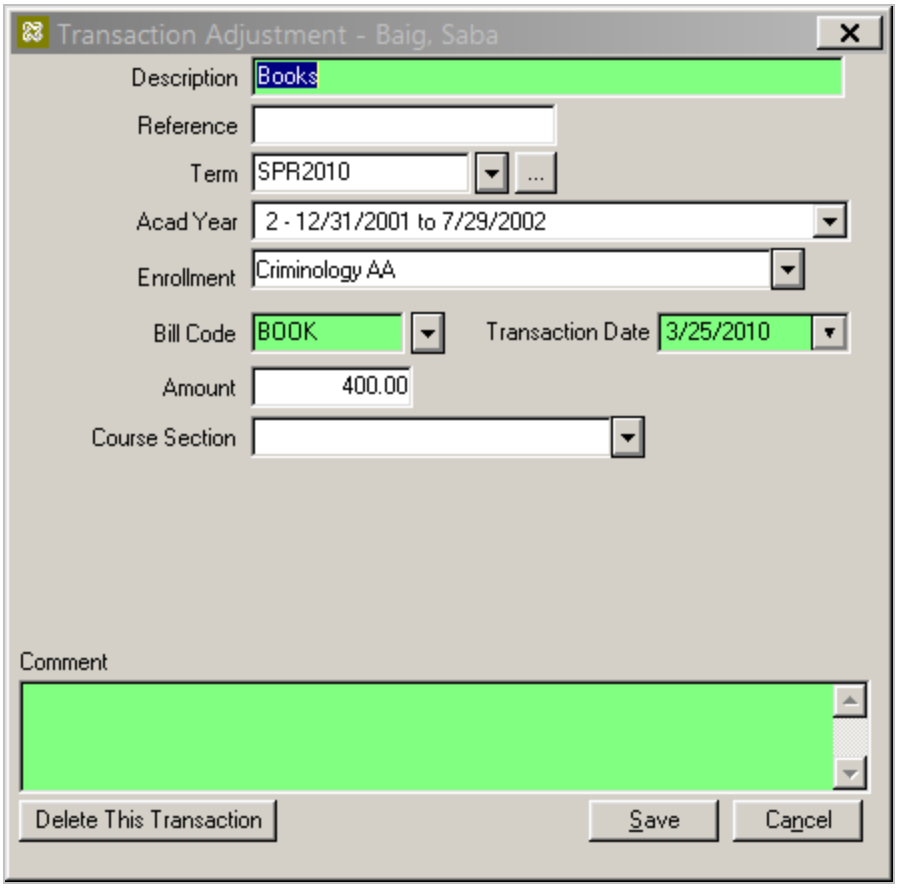
Note: The Check Status and Check Date fields are usually populated through an API; however, users can edit them.

e. Enter an **Adjustment Comment** to document your changes.

f. Click **Save**.

Transaction Adjustment

1. On the Transaction Adjustment form, edit the field values as needed.



   If an academic year is specified in the Acad Year list, you can filter the choices available in the Payment Period list to only the payment period records associated with the academic year record.

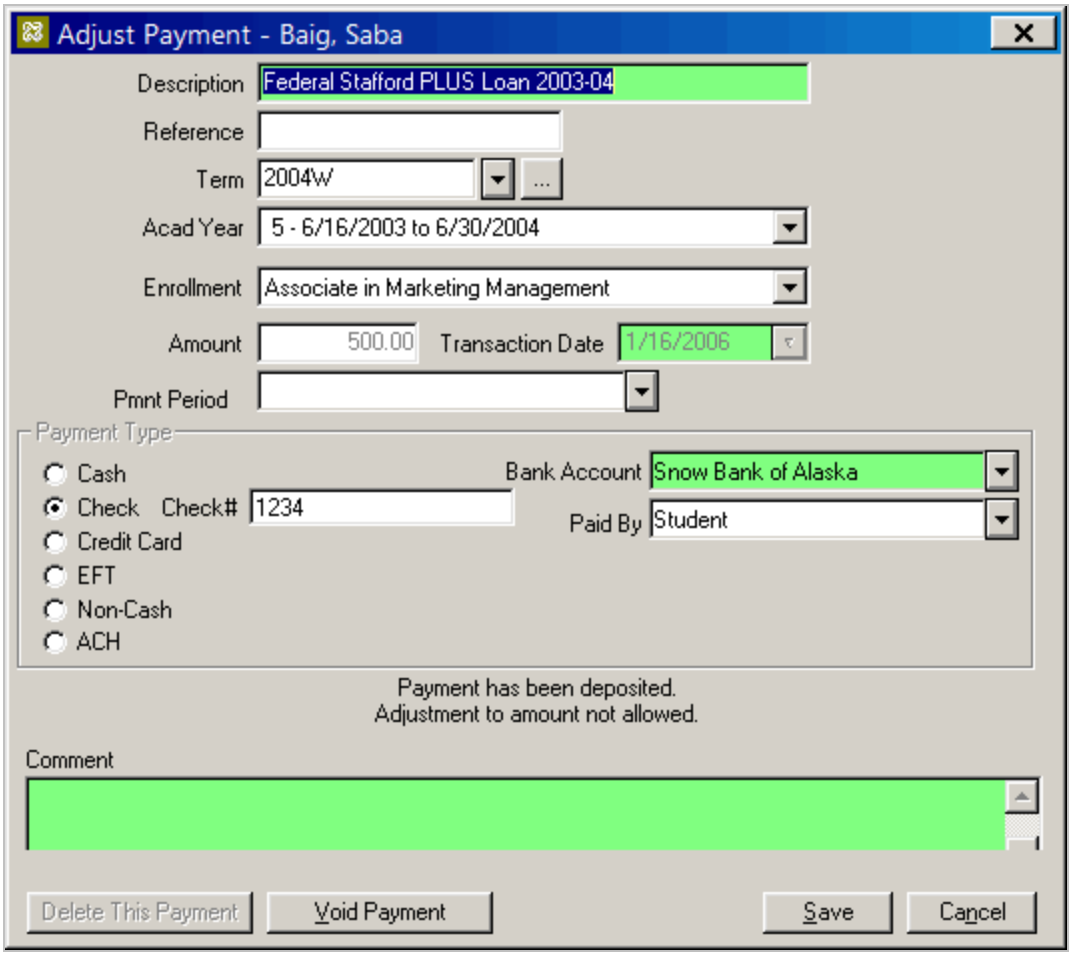
   The enrollment status and enrollment ID appear after each listed enrollment to help distinguish to which enrollment a transaction is being transferred.

2. If necessary, click **Delete This Transaction** to remove the transaction from the student's ledger card. The deleted transaction is displayed on the Adjustments tab of the Ledger Card.

3. Click **Save** to save your changes.

Adjust Payment

1. On the Adjust Payment form, select appropriate options depending on the adjustment needed and your permissions to perform that adjustment.



- The **Payment Type** section is enabled, if you have permission to edit payments.
- The **Delete This Payment** or **Delete this Transaction** button is enabled if you have delete permissions for adjusting a transaction and the payment has not yet been deposited.
- The **Returned Check** button is enabled if the payment has been returned by the bank.
- The **Void Payment** button is enabled if you have void payment permissions and all of the following conditions are true:

  If the payment selected for adjustment is UNSCHEDULED:

  - Source = S in the SA transaction file.
  - Type = P in the SA transaction file.
  - The FA Student Aid ID is NULL in the SA transaction file.
  - The FA disbursement ID is NULL in the SA transaction file.
  - The sent back flag = 0 in the SA transaction file.

  - OR -

  If the Transaction chosen for adjustment is SCHEDULED:

  - Source = S in the SA transaction file.
  - Type = P in the SA transaction file.

- The FA student aid ID is type CASH or OTHER.
- The sent back flag = 0 in the SA transaction file.

When you click Void Payment, CampusNexus Student creates a new transaction record to indicate the voided payment and updates the disbursement, student aid, and financial aid schedule records to reflect the voided payment. It also updates the enrollment, student, and transaction adjustment history file for all voided payments. (The record is not deleted from the Student Accounts Transaction File.)

A new record is created in the transaction file:

- Type = P
- Source = S
- SentBack = 1
- Ref = VOID
- Descrip = "VOID" + Original Description
- Amount = Original transaction amount multiplied by -1
- All other information should remain as the original transaction.

A Financial Aid disbursement can be voided even if it has already been released to the General Ledger. CampusNexus Student posts a reversing entry in the amount of the original disbursement to the student's ledger card. The FA disbursement record status is updated to "V - Void" (instead of deleting the record).

Notes:

- If the Credit Card has expired, the transaction cannot be voided.
- Payment transactions with dates prior to the Minimum Transaction Date of the campus to which the transactions were posted cannot be voided.

2. After you have completed the required fields and selected the adjustment option, a confirmation message is displayed. Click **Yes** to proceed.
3. After a transaction has been changed, you can see the record of the change by clicking the Adjustments tab on the Ledger Card form.

   For information about Transaction Details, see Transaction Details Detail Tab.

Post Individual Refunds

You can post individual refunds to student ledger cards. You must specify to which fund source the refund applies. All payment and refund transactions require a bank account for posting. CampusNexus Student processes refunds for enrolled students and new lead students that have not enrolled yet.

If you use any of the posting options–payments, charges, or refunds–and the posting flag is set to Current Campus, you can only post to an enrollment at the current campus. If you try to post transactions for another campus, a message indicates that you are not signed into the campus and posting is not allowed. If the Posting Flag is set to Any Campus, you can post transactions for a student at any campus.

The refund posting procedure uses the Agency description when posting refunds to third-party agencies. The descriptions on the disbursement transaction and the refund transaction will match.

See also Ledger Card and Process Electronic Drafts.

Updating the Direct Loan Disbursement File

CampusNexus Student updates the direct loan disbursement file when a refund is posted to a student's ledger card. Each refund that is posted to a student's ledger card is reported to COD (Common Origination and Disbursement). CampusNexus Student determines if a row should be added to the direct loan disbursement table. A row will be added to the table if all of the following conditions are met:

- The fund source type of the refund is DIRSUB, DIRUNSUB, or DIRPLUS.
- The Use Direct Loan flag is set to true for the student's campus.
- A row exists in the FA Loan table where the Student Aid ID equals the ID for the FA for which the refund is being posted.

If Auto create Loan Period Orig. Changes when student Withdraws or Refund is posted? is activated, an origination change is created for the following reasons during the posting of the refund:

- An origination change record is created to reduce the Award Amount to exclude the gross amount of the refund posted.
- For a fully refunded disbursement, an origination change record is created to exclude that disbursement’s payment period from the Loan Period, if the disbursement is in a payment period after the initial payment period on the loan.

If there are pending origination changes for the Award Amount or Loan Period End Date that have not yet been sent to COD, they will be updated with the corresponding information from the posted refund record.

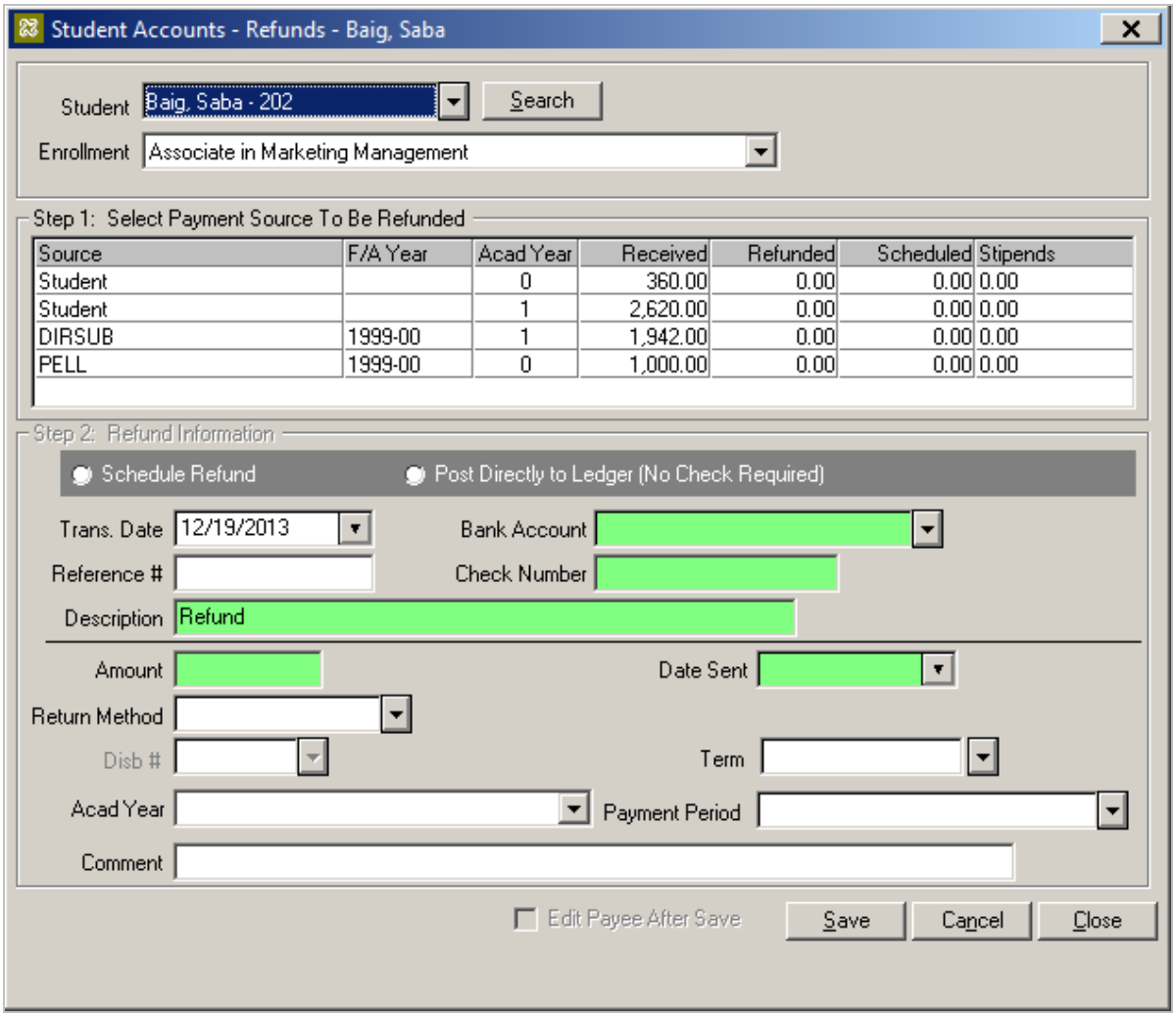
ACH Processing

CampusNexus Student updates the ACH export file when a refund is posted to a student's ledger card and the following applies:

- The fund source type of the refund is CASH.
- The Direct Deposit flag is set to true for the student's bank account.
- The student's institution uses ACH for refund/stipend processing.

To post a manual refund:

1. Navigate **Daily > Student Accounts > Post Refunds**. The Student Accounts - Refunds form is displayed.



2. Select the **Student** to whom the refund applies.
3. Select the **Enrollment** to which the refund applies.
4. Select the **Payment Source** to be refunded. If the selected fund source is deactivated, a message will appear in red and the refund may not be processed.

   If the Payment Source is Student, the Disb # field is disabled. If the Payment Source uses disbursements from an institution, the Disb # field is enabled.
5. Select **Schedule Refund** or **Post Directly to Ledger (No Check Required)**.
   - Select Schedule Refund to add a refund and not post it to the ledger by selecting. CampusNexus Student will add the refund to the "check to print" list via Print Checks functions (see Process Refunds/Stipends). This allows you to schedule refund checks outside of performing a refund calculation. The Schedule Refund option is enabled only if you have Schedule Refund permission.

- Select Post Directly to Ledger when a check has already been issued and you want to record it in CampusNexus Student. The transaction will be posted to the ledger card, but no check will be scheduled. The Apply Refund check box (if present) becomes enabled and can remain selected or be cleared, as needed. The Post Directly to Ledger (No Check Required) option is enabled only if you have Post Refund permissions.

6. Depending on your selection above, enter the **Trans. Date**, **Bank Account**, **Reference #**, and **Check Number**.

   When CampusNexus Finance, HR & Payroll is integrated with CampusNexus Student, the Check Number is required.

7. The **Refund's Description** that was entered when adding or editing the fund source is displayed if one was configured, otherwise the system-defined Refund Description is displayed. You can **override** the Description here. CampusNexus Student will add the fund source and financial aid year to the description entered. The maximum length of the field is 100 characters which includes the addition of the system defined values.

8. Enter the **Amount** to be refunded. Negative refund amounts are not permitted.

   Some refunds are mandatory. Institution are required to refund the funds, and they have to work directly with the student to recover a loss associated with a stipend. CampusNexus Student will allow a refund to be issued to a student for an amount greater than what was paid by the student on the ledger card. If there is a credit balance remaining after all money has been returned, the credit balance may be posted as a refund due to the student.

9. Enter the **Date Due**. Note that this date cannot be any earlier than the Minimum Transaction Date set in the Campus Information setup.

10. In the **Disb #** field, select or enter the disbursement number against which the refund is given. The disbursement number contains an amount that may or may not be equal to the amount being refunded. If the amount being refunded is more than already scheduled for the disbursement, the remainder will be drawn from other disbursements associated with the payment source and enrollment. This applies to DIRSUB, DIRUNSUB, DIRPLUS and Pell only, since the system does not currently create COD adjustments for TEACH refunds.

    A. If the amount is associated with a disbursement number, and the amount is more than the total already set for the disbursement, you are prompted to decide if you want to associate the excess refund amount with other paid disbursements.
    B. If you click No, the message is no longer displayed and you can specify a different total in the Amount field.
    C. If you click Yes, the Refund Assignment - Fund Source form is displayed.
    D. You can then adjust the amounts to be refunded against a disbursement number by changing the number in the Refund Amt. column.

    When a refund associated with a disbursement number is posted, CampusNexus Student flags an adjustment record to be sent to COD. This adjustment will contain the disbursement number that is associated with the refund. This information is exported to COD as an adjustment record with the correct disbursement number and sequence number.

11. Select the **Return Method** (Check, Master Check, EFT, Net, ACH).

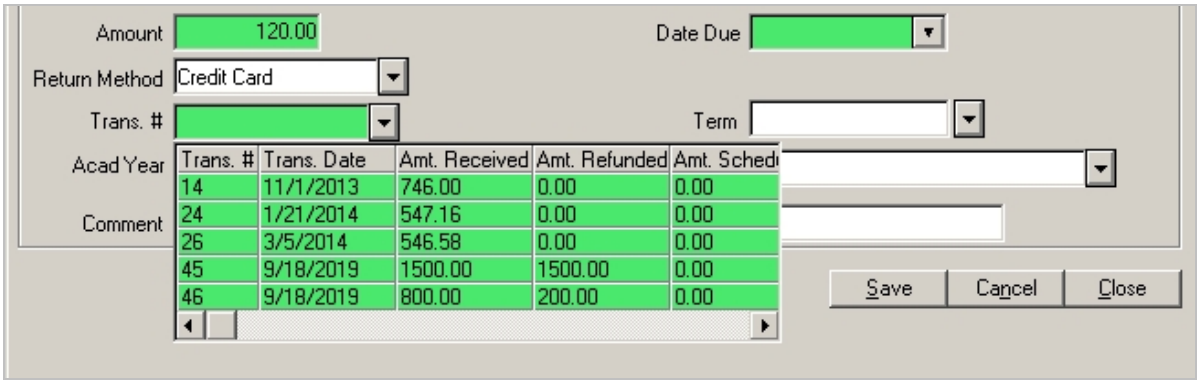
    If the Schedule Refund option is selected, the return method will default to ACH if the campus is configured for an ACH processor for refunds, and the student has at least one checking/savings account configured for direct deposit. ACH is allowed only if the fund source is CASH. If Post Directly to Ledger is selected, the ACH option will be disabled, even if these ACH conditions are met.

    When CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll the following conditions apply:

- When a subsidiary refund transaction is created, Return Method = 'Master Check' is not available.
- When a subsidiary refund transaction is created with Return Method = 'Check', the transaction cannot be voided in CampusNexus Student.

12. Select the Credit Card Type. This field is available when DIRSUB, DIRUNSUB, DIRPLUS and Pell are NOT selected. See also Credit Card and credit card batch setup.

    Note: When Credit Card is selected as the **Return Method** and the student's enrollment campus is configured to use ACI as the payment gateway provider, a required drop-down field appears under the **Trans #** field so you can select a specific transaction. All available credit card transactions associated with the selected payment source are listed with details such as the Transaction #, Transaction Date, Transaction Amounts (Received, Refunded, Scheduled), etc... Since the drop-down field is required, you must select a specific payment to post the refund against to proceed.



13. Enter the **Term**, **Academic Year**, **Payment Period**, and **Comment**.

    The Payment Period field is available (visible on the form) for program versions that can use it (program versions with academic calendars 1, 5, and 6). When Academic Year is selected, this combo box will filter out academic years other than the selection. If the Academic Year box is cleared, all payment periods will be available for selection. If no payment periods exist, the combo box will not be displayed.
    Conversely, when Payment Period is selected, the Academic Year will be auto populated. If Academic Year is modified after Payment Period is selected, this field will be cleared and validated during Save.

    The notation for Payment Periods is `A<n>|P<m>` where `<n>` is the academic year sequence number and `<m>` is the payment period sequence number.

14. Select **Edit Payee After Save** to change the payee information when processing a refund check.

    The Edit Payee After Save check box is disabled if the staff member does not have Edit Payee on Schedule Refund permissions.

15. Select or clear the **Apply Refund** as needed.

    This check box is visible and enabled only if the campus setting for 'How Should Payments Be Applied?' (Setup > Campus Locations > Edit (campus) > Accounting tab) is 'Manual/User Applied' **and** 'Post Directly to Ledger' is selected.

16. Click **Save** to save your refund. The refund will be posted to the student's ledger card.

When a Pell refund is posted to the student's ledger card and the school uses the Pell Processing system, CampusNexus Student will ask the following question: *"Mark this refund as Ready To Send to RFMS?"* If you answer Yes, CampusNexus Student finds the corresponding record in the FA Refund table. If the Pell grant disbursement status is not equal "S - Sent", the status code is replaced with "R - Ready to Send".

If the fund source for the refund being posted is a Direct Subsidized, Unsubsidized, or PLUS loan, a record will be written to the file containing the history of disbursements and refunds sent to COD. On the Direct Loan form, you would see these history records on the Received and Refunds tab under "Disbursements at COD". The View Refunds button is also displayed; users can click View Refunds to note what amounts are being refunded and what disbursements are being associated with those refunds.

After a refund selected for a single disbursement has been saved, it is displayed in the Student Ledger Card form as a refund, with the disbursement number noted in the Description field. It is also displayed in the Transaction Detail form with the total of the refund in the Amount field and the disbursement number associated with the amount in the Disb # field.

After the refunds across multiple disbursements have been saved, they appear on the Student Ledger Card form as a single refund amount with a Description field displaying the Disbursement numbers. It is also displayed in the Transaction Detail form with the total of the refund in the Amount field and the disbursement numbers associated with the amount in the Disb # field.

The disbursements will also properly appear on the Disbursements at COD section of the Rcvd Refund/Stipend tab of the Fund Source form.

Audit Features

The audit features for Student Accounts include:

- CampusNexus Student stores the name of the payee on each refund record, stipend record, and subsidiary refund so that it can be retrieved for reporting purposes.
- CampusNexus Student audits changes to the payee for refunds and stipends. Auditing occurs from the time the refund or stipend is scheduled to the time the refund or stipend is processed. The date changed, time changed, and the user who made the change are audited.
- Payee changes are audited for subsidiaries.
- Payee information for a stipend can be edited regardless of the fund source associated with the stipend. The payee changes are audited for all stipends.
- Your ability to edit a payee for a refund is dependent on the fund source associated with the refund. The payee changes are audited only for the fund sources that allow the payee to be changed.
- You can sort on different columns of the grids available in the Process Refunds/Stipends wizard.
- A student account administrator can define that the Reference information is printed on the check, below the address, or on the stub, or in both places.
- A student account administrator can view the ID of the user who scheduled the refund/stipend using the Ledger Card, Transaction Detail button.
- CampusNexus Student stores the user ID of the user who scheduled the stipend so that it does not get overwritten by the user ID of the user who posted the stipend.

Apply Credits - Student Charges and Payments

If your campus is configured for Auto Apply Using Hierarchy, you can use the Manage Student Ledger form to review, unapply, and manually re-apply transactions.

Note the following before you apply credits:

- Basis = payment period or previous payment period and are limited to transactions within the same enrollment.
- Credit transactions of type I, C, and D are applied to debit transactions of the same transaction code in the same term/payment period regardless of the hierarchy configuration. For example, a -$100 TUIT charge will only be applied to TUIT charge in the same term/payment period. You can choose to override this functionality by manually applying these transactions.
- Void/NSF transactions (debits) are applied to the original credit transactions.
- Refund/Stipend transactions (debits) are applied to payments of the same award type first. Any remaining unapplied amounts on the payment are then applied to open debit transactions based on the hierarchy configuration.

  Example: A $100 SUB payment (credit transaction) is posted to the student's ledger card and has been fully applied to a TUIT charge. A $50 refund/stipend (debit transaction) for the same SUB award is then posted to the ledger card. CampusNexus Studentunapplies the $100 SUB payment from the TUIT charge, applies a $50 SUB payment toward the SUB refund/stipend, and applies the remaining $50 SUB payment to the TUIT charge.

The transaction types and transaction amounts in the tables below refer to the Type and Amount when viewing the Transaction Detail on the ledger card.

Debit transactions (increasing the student ledger balance) include the following:

Debit Transactions

Type	Amount
Invoice	>= 0.00
Debit Memo	>= 0.00
Credit Memo	< 0.00
Payment	< 0.00

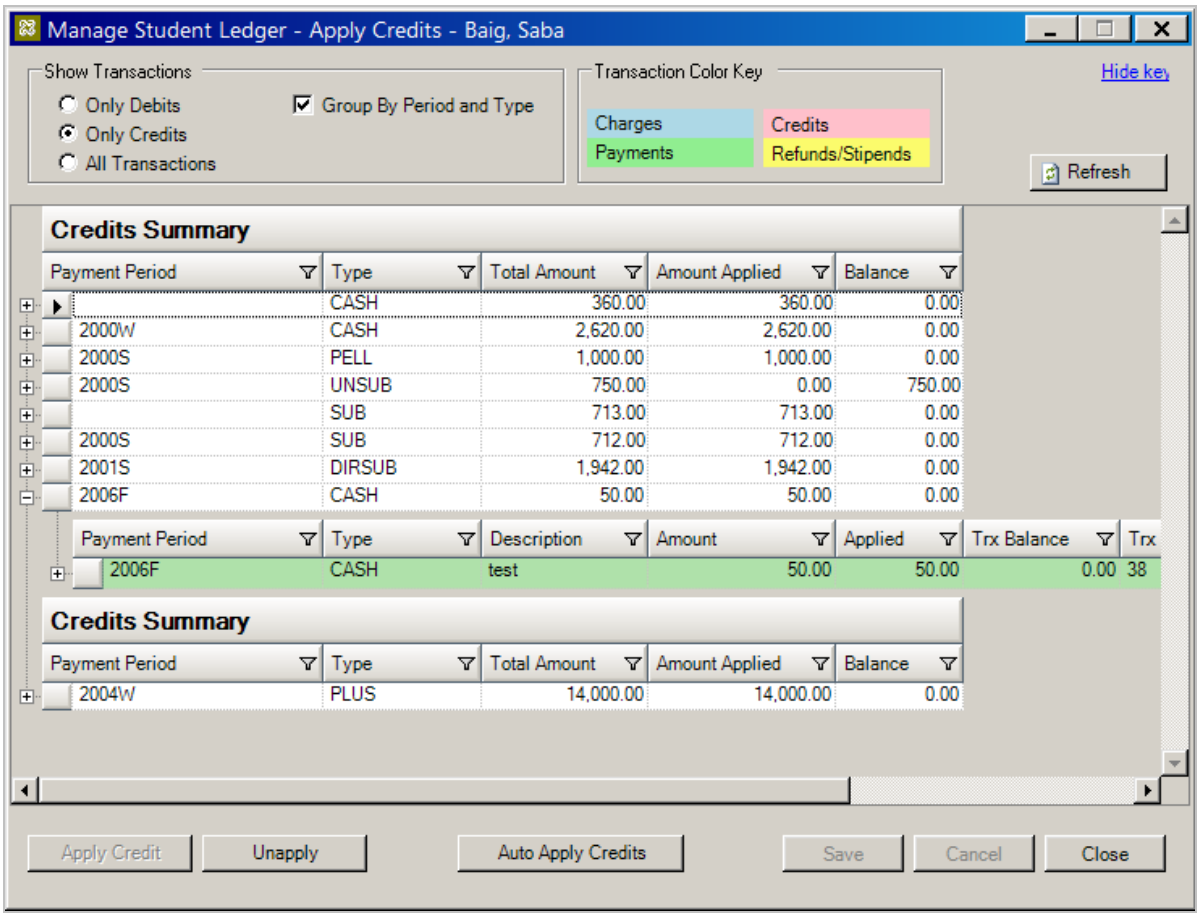
Credit transactions (decreasing the student ledger balance) include the following:

Credit Transactions

Type	Amount
Invoice	< 0.00
Debit Memo	< 0.00
Credit Memo	>= 0.00
Payment	>= 0.00

To apply credits:

1. Select the student whose ledger card you want to view.
2. Navigate to **View > Student Accounts > Ledger Cards**. The Student Ledger Card is displayed.
3. Select a transaction and click **Apply Credits**. The Manage Student Ledger form is displayed.
4. In the Show Transactions area, select the transactions you would like to view. The options are as follows:
   - Only Debits
   - Only Credits
   - All Transactions
   - Group By Period and Type
5. Click the **Show key** link to view the color key for the transactions.



6. Expand the list of transaction by clicking the plus (+) sign next to an item. If an item in the expanded list is a credit, you can see the debits applied to that credit. Conversely, if the item in the expanded list is a debit, you can see the credit associated with that debit.
7. Click on the credit you want to apply. The form lists all transaction types. To find specific transactions, use the following options:
   - Sort the columns by clicking on the column headings.
   - Filter the data in the columns by clicking on the filter icon

. A list of predefined filter fields and an option for custom filters is displayed.

8. Select one of the following actions:

   - Click **Unapply** to remove the credit from a debit. This button is enabled when the currently selected row is a debit transaction with at least one credit applied or a credit row that has been applied to at least one debit. It is also enabled when the current row is a group row with any amounts previously applied.

     Depending on the row selection, the unapply will have different behavior.

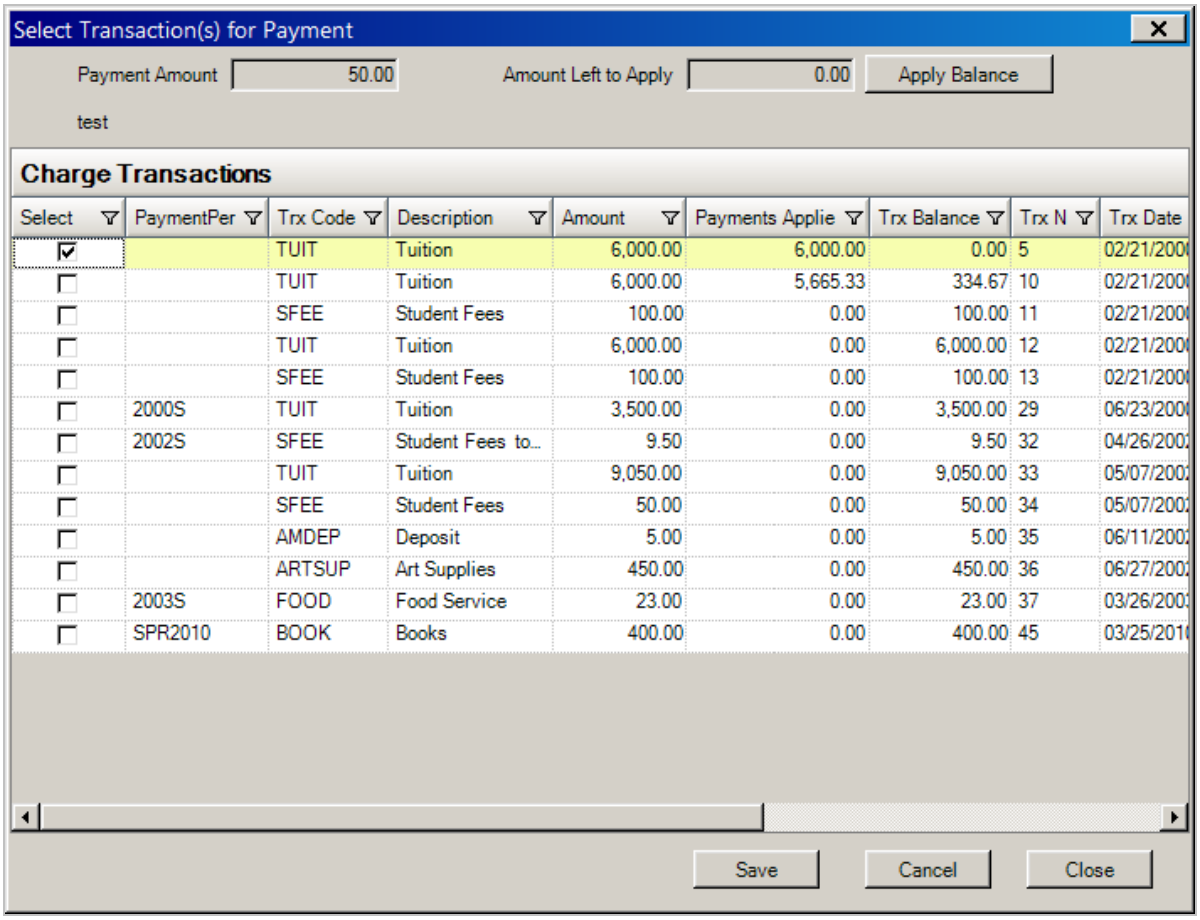
     - If the current row is a summary row (Transactions are Grouped By Period and Type), all detail rows below the selected row will be unapplied.
     - If it is a detail row, only the selected detail row will be unapplied.
     - When selecting this option, groups of transaction types for the selected period can be unapplied at one time. For example, if you have multiple registration fees (REG) of $50 for period 2009W and you want to unapply all the $50 registration fees for the 2009W period at one time, you would do so by selecting the 2009W grid line with type REG and then clicking **Unapply**.

   - Click **Auto Apply Credits** to auto-apply all unapplied credit transactions displayed based on the hierarchies configured in Configure Payment Apply Order. If there are any credits with a remaining amount to be applied, this button is enabled. When you click Auto Apply Credits, the auto-apply logic executes and applies all credits that have balances to be applied.

     - Transactions that are manually applied will not be overwritten by the auto-apply function.
     - You do not need to click Save to apply auto-applied credits because it will occur automatically.
     - You cannot cancel the auto-apply results.
     - After the auto-apply has completed, the transactions are re-loaded into the grid and you can continue manually editing transactions.

   - Click **Apply Credit** to apply credits to debits with open balances. This button is enabled when the currently selected row is a credit that has not been fully applied. When selecting this option, the Select Transaction(s) for Payment form is displayed.

     The *Payment Amount* field shows the original payment. The *Amount Left to Apply* field shows the remainder left from the *Payment Amount* that is available to be applied.



You can apply a credit to any debit with an open balance. You are not restricted by the hierarchy configured.

a. Select the debit(s) you would like to apply the credit to. If you select a debit that reduces the credit to $0 and try to select another debit to apply a credit to, the following message is displayed: *"The full amount of the transaction has been applied. No more items can be selected."*

b. Click **Apply Balance**. The *Amount Left to Apply* is reduced as you apply payments.

c. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. You are returned to the Manage Student Ledger form:.

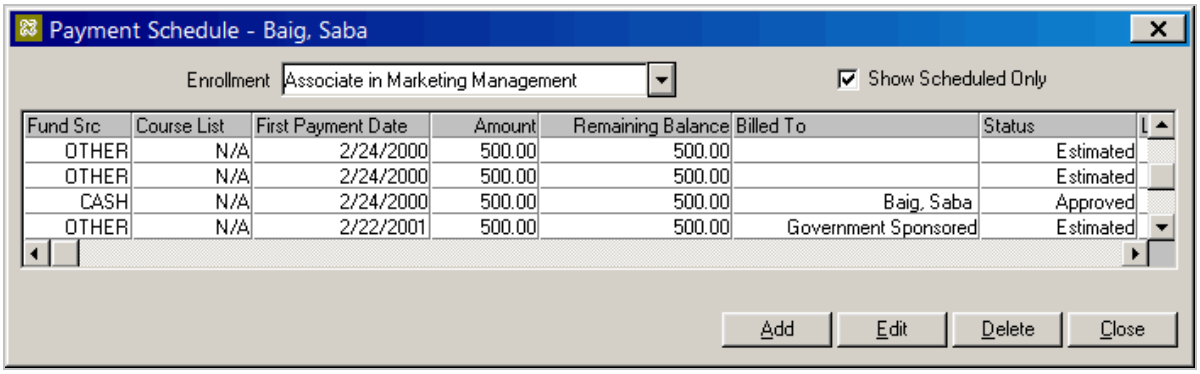
9. Click **Close** to close the form.

Payment Schedule

Institutions send billing statements to students that display the status of a student's payment plan. Use this procedure to set up and monitor a schedule of payments by the student or a third party such as a sponsoring agency. See also scheduling refunds and stipends.

To set up a payment schedule:

1. Navigate to **View > Student Accounts > Payment Schedule**. The Payment Schedule form is displayed. The most recent enrollment is selected by default. The grid is sorted by the First Payment Date field. The oldest value is listed first.



   The 'Last Statement' column contains the date the last student payment statement was printed for each payment plan. The Last Statement date field is only updated for Student and Agency Payments with a Fund Source type of 'Cash' when the student statement process is completed (**Daily > Student Accounts > Student Payment Statements**). This field is updated with the system date when you confirm that the statements was printed correctly and click **Finish**in the Print Student Statements wizard. Institutions can reference the Last Statement date field on the Payment Schedule form (**View** > **Student Accounts** > **Payment Schedule**) to ensure that the billing statements are sent out to the students on a regular basis.

2. Select or clear the **Show Scheduled Only** check box. When the check box is selected (default), only payment plans with at least one scheduled payment not yet received are displayed. When the check box is cleared, all payments regardless of their status are displayed.

3. Click **Add** to start a new payment schedule. The New Source of Aid form is displayed.

   - OR -

   Select an item on the grid and click **Edit** to view the data for an existing schedule. The F/A Student Cash Payment/Other form is displayed. Skip to step 8.

   Note: If a staff member does not have permission to edit a payment schedule, the Edit button is disabled. The Delete button is disabled if the staff member does not have permission to delete payment schedules.

4. In the New Source of Aid form, select the **Source**, **Academic Year**, and **Award Year**. A warning message is displayed if you do not choose an academic year to which the payment schedule applies. Select the Fund Source type of 'Cash' if you want the Last Statement date field to record and update the date the last student payment statement was printed for each payment plan.

5. Enter the **Gross Amount** of the payments.

6. Select the **Status** of the payment schedule. The options are:

- Estimated
- Approved
- Pending Approval

7. Click **Continue**. The F/A Student Cash Payment/Other form is displayed.
8. In the F/A Student Cash Payment/Other form, select the **Student Payment** or **Agency Payment** option. The Student Payment option is described here. The Agency Payment option is slightly different. You need to select a previously set up agency.
9. Select the **Status** of the payment schedule. The options are:
   - Estimated
   - Approved
   - Pending Approval

   If you are setting up a new payment schedule, you will have selected the initial status on the New Source of Aid form.
10. Enter the **Number of Payments**, **Interest Rate**, **Payment Frequency**, and **First Payment Date**.
11. Click **Calculate** to have CampusNexus Student calculate the dates and amounts of each payment on the schedule. The list of payments is displayed in the grid.

    Note: If your institution set up a rule to restrict payments to a fixed number of days past the graduation date, CampusNexus Student displays a message indicating that all payments are due by ___. You are prompted to confirm the recalculation of the payment plan.

    - When you click **Yes**, CampusNexus Student calculates a valid payment plan.
    - When you click **No** and recalculate the payment plan yourself, make sure not to schedule a payment past the limit. This feature is set up in Setup > Campus Locations > Campus Allow...
12. For each payment, select the **Term** to which the payment applies. This is optional but useful information. When packaging a Student Cash payment plan, the individual payments can be edited after the payment plan is calculated.
13. The **Status** of each payment is initially set to **Scheduled (S)**. CampusNexus Student changes the status to Paid, Cancelled, and so on as each scheduled payment is paid or otherwise processed.
14. A **Print Promissory Note** button is displayed if the "Allow Printing Promissory Note" option has been activated for the campus via the Lists > Financial Aid > Fund Source path and a location has been designated for custom reports. If either of these settings are not set up, the standard promissory note is printed instead of the custom promissory note.
15. Click **Save**.

    The other tabs on F/A Student Cash Payment/Other form provide tracking information about the scheduled payments.

    - The Payments Received tab shows a list of payments received from the student or agency. It also maintains the Total Paid, the Principal Balance, the Interest Balance, and the Next Payment Due date.
    - The Refunds tab shows a list of any refunds made to the student or agency. It lists the Refund Due Date, Date Sent, Refund Amount, Refund Check Number, and Refund Status.
    - The Auto Draft tab has two fields for selecting accounts. Use the top 'Select Account' field for ACH

processing. The bottom field is for credit card processing. Select the option 'Credit Card Authorized for Automatic Payment' and select a credit card account from those on file that the student wishes to be debited for payments. Select an Effective Date. This is the date on which the payment schedule begins.

Note: It is assumed that credit card payment has already been set up for this student via View > Student Accounts > Payment Information.

- The Comments tab offers a text window in which you can enter comments about the student's payment schedule.

16. Click **Close** to close the form. You are returned to the Payment Schedule form. Click **Close** to close the form.

Payment Schedule Date Calculations:

CampusNexus Student calculates payment schedule dates as illustrated below:

First Pay Date = 01/30/2004 Number Payments: 6

Payment # Date

1. 1/30/2004
2. 2/28/2004
3. 3/30/2004
4. 4/30/2004
5. 5/30/2004
6. 6/30/2004

First Pay Date = 01/31/2001 Number Payments: 6

Payment # Date

1. 1/31/2004
2. 2/28/2004
3. 3/31/2004
4. 4/30/2004
5. 5/31/2004
6. 6/30/2004

First Pay Date = 02/29/2004 Number Payments: 6

Payment # Date

1. 2/29/2004
2. 3/31/2004
3. 4/30/2004
4. 5/31/2004
5. 6/30/2004
6. 7/31/2004

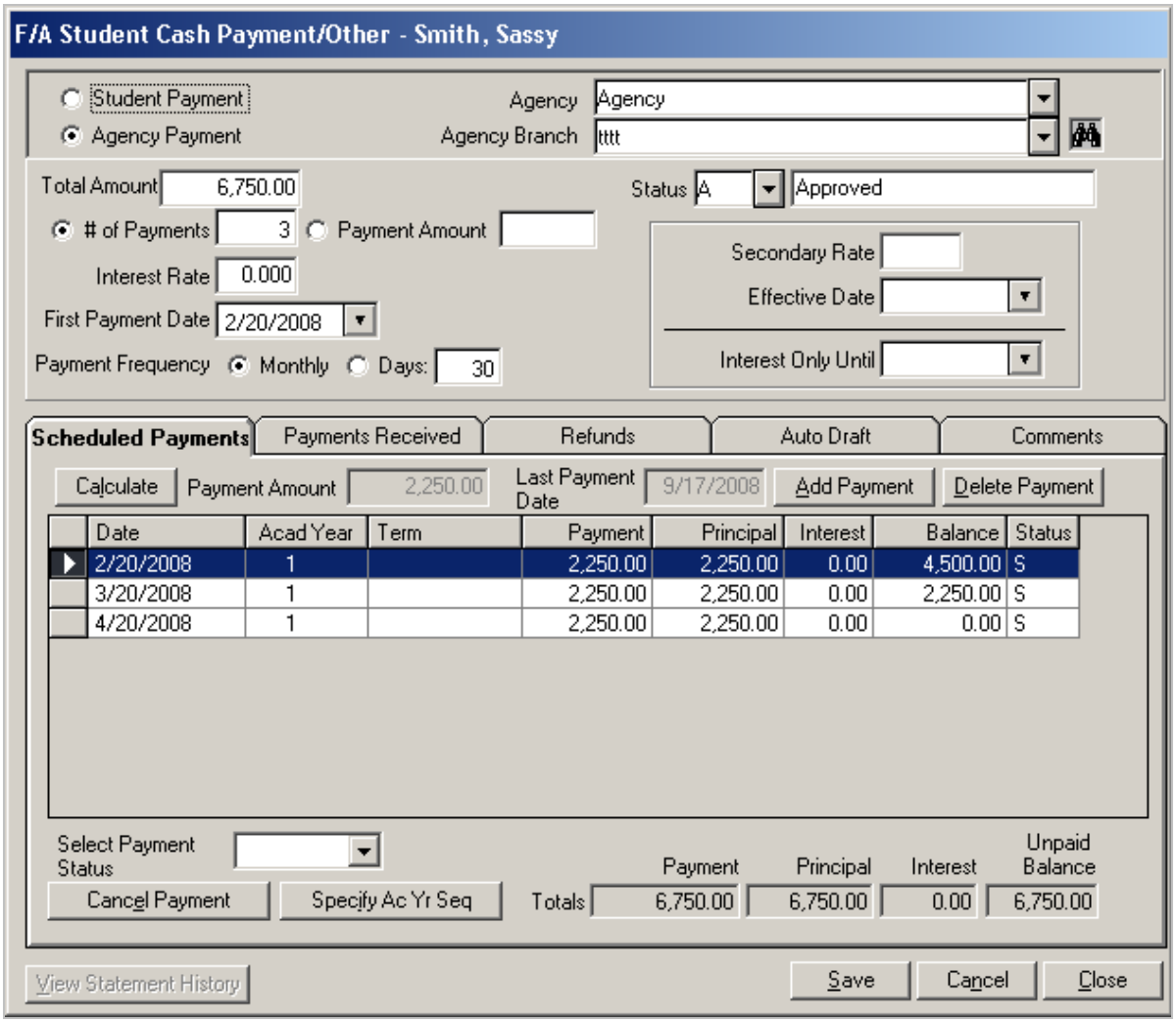
First Pay Date = 02/28/2004 Number Payments: 6

Payment # Date

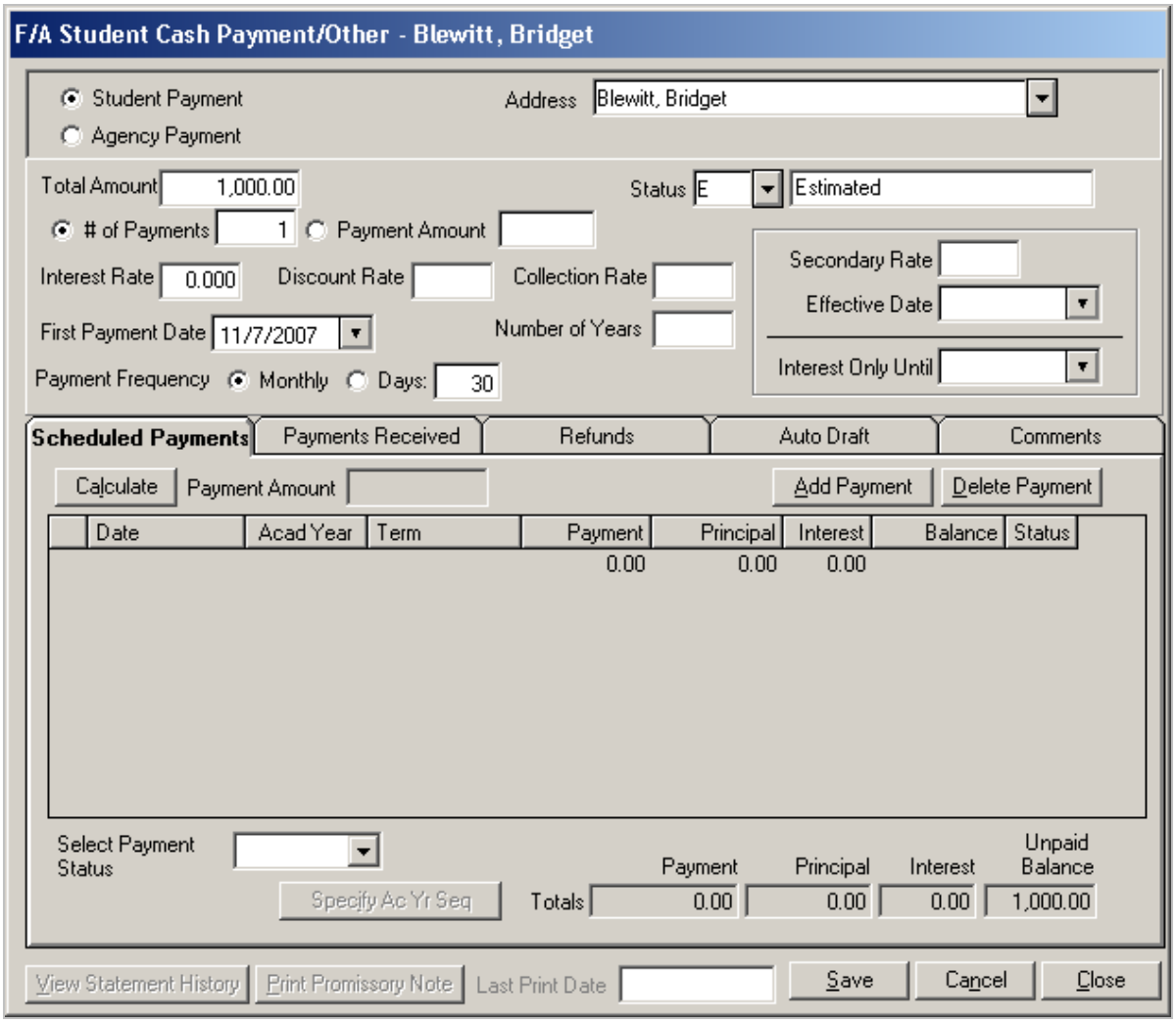
1. 2/28/2004
2. 3/28/2004
3. 4/28/2004
4. 5/28/2004
5. 6/28/2004
6. 7/28/2004

Payment Periods

Payment periods are suppressed in the user interface for agency and student payment plans even though they are available to be configured to use payment periods in the program version setup. The following image shows an example.



Three additional fields appear on this form to allow for the calculation of the NPV (Net Present Value). These additional fields, **Number of Years**, **Discount Rate**, and **Collection Rate**, appear only when the configuration option "Use Individual Institution Loan calculation" has been selected from the Fund Source Code Setup form. These fields are populated once the award is saved. If any of these values are missing, the loan will not be included in the 90/10 Report calculations. For more information see the 90/10 Report NPV Calculation Options under Lists > Financial Aid Sources > Fund Source.


F/A Student Cash Payment/Other - Blewitt, Bridget
Student Payment
Agency Payment
Address
Blewitt, Bridget
Total Amount
1,000.00
Status
E
Estimated
# of Payments
1
Payment Amount
Interest Rate
0.000
Discount Rate
Collection Rate
Secondary Rate
Effective Date
First Payment Date
11/7/2007
Number of Years
Interest Only Until
Payment Frequency
Monthly
Days:
30
Scheduled Payments
Payments Received
Refunds
Auto Draft
Comments
Calculate
Payment Amount
Add Payment
Delete Payment
Date
Acad Year
Term
Payment
Principal
Interest
Balance
Status
0.00
0.00
0.00
Select Payment Status
Specify Ac Yr Seq
Totals
Payment
Principal
Interest
Unpaid Balance
0.00
0.00
0.00
1,000.00
View Statement History
Print Promissory Note
Last Print Date
Save
Cancel
Close

Payment Adjustments

Payment adjustments have an effect on your cash account (bank deposit) and possibly on your Credit Card Payments Receivable account. They show up in the Payments column on the Student Ledger Card.

If it should become necessary to "adjust" a payment transaction, you can enter the selections as you did in the original payment, but enter the adjusting amount as a negative value. You cannot "apply" the negative payment to a charge transaction because you can only enter positive amounts on the "Apply to" grid. You will have to reduce the amount of the charge with a charge adjustment to offset the payment adjustment.

When Pell disbursements are posted to the student's ledger card, the disbursement records will be marked as Ready to Send to RFMS if they have not already been marked as such. This is only applicable if the fund source type is 'Pell'.

If the fund source for the payment being posted is a direct subsidized, unsubsidized, or PLUS loan, a record will be written to the file containing the history of disbursements and refunds sent to COD. On the Direct Loan form, you would see these history records on the Received and Refunds tab under "Disbursements at COD".

Apply Payments to Charges

When a student receives a payment or credit transaction, you can apply the payment to specific charges. The Apply Payments/Credit form displays the current list of open charges for the student.

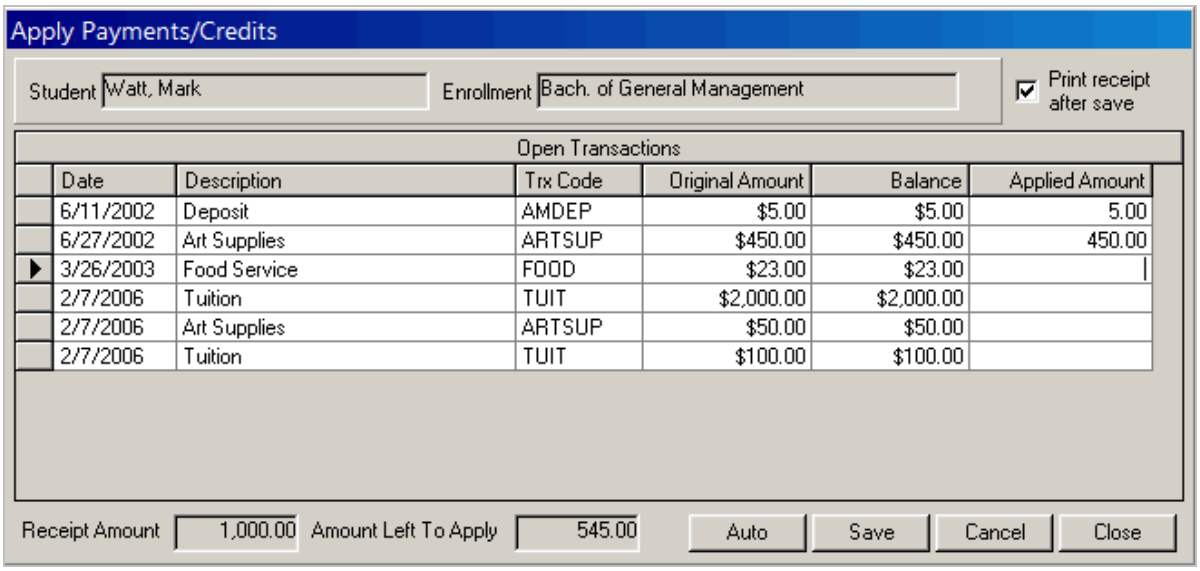
Note: When CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll, CampusNexus Student sends the details of the transaction to which payments were applied to CampusNexus Finance, HR & Payroll during the Release to General Ledger. The transaction details include:

- Payment Transaction ID
- Transaction IDs for the charges towards which the payment was applied. (One or more charge Transaction IDs depending on if the payment was fully applied or partially applied.)
- Amount applied towards each charge.

If a payment was partially applied, CampusNexus Student continues to show the remaining amount that can be applied in the Apply Payment/Credits form.

To apply payments to charges:

1. Select the student whose ledger card you want to view.
2. Navigate to **View > Student Accounts > Ledger Cards**. The Student Ledger Card is displayed.
3. Select a payment or credit transaction and click **Apply Payment** to apply it to specific charges. The Apply Payments/Credit form is displayed containing the current list of open transactions for the student. Note the *Receipt Amount* and *Amount Left to Apply* fields at the bottom of the form.



4. Enter all or part of the payment received in the **Applied Amount** column of the transaction you selected. The *Amount Left to Apply* will be reduced by the amount you enter.

   If the payment received is to be applied to more than one open transaction, select another transaction and enter more of the payment received amount. Continue until the *Amount Left to Apply* is reduced to zero.

   Note that you must tab out of the Applied Amount column before the amount you enter will actually be applied to the selected transaction.

5. To print a receipts after you save the payment distribution, select **Print receipt after save**.

6. To automatically apply the payment to the oldest outstanding charges, click **Auto**. CampusNexus Student will apply the payment in order to the open transactions until all of it has been applied.
7. Click **Save** to complete the payment application procedure. CampusNexus Student will save the distribution of the payment and display a confirmation message. Click **OK** to acknowledge the confirmation.
8. If *Print receipt after save* is selected, CampusNexus Studentprints a receipt on your designated receipt printer. (Your receipt printer must be set up by the system administrator in advance of any print request.)

Stipend Schedule

Stipend schedules are set up to distribute money from financial aid fund sources to the student. Stipends cover living expenses incurred by the student while pursuing a program of study.

You can create one stipend schedule for each academic year defined for the enrollment. You can have unique account numbers for stipends. You can assign each scheduled disbursement to a fund source. This allows stipend disbursements within one stipend schedule to be drawn from different fund sources.

Once the stipend is scheduled, an ACH stipend may be approved to be paid through the Process Refunds/Stipends wizard. ACH batch processing of stipends may occur through the Process Electronic Draft wizard.

Fund Source Security

The fund source disbursements listed in the Scheduled Disbursements tab are limited based on your Stipend Schedule permissions.

- *Edit Scheduled Stipend* permissions for the fund source are required to view fund source information in the Scheduled Disbursements tab.
- *Edit Payee on Scheduled Stipend* permissions for the fund source are required to enable the *Edit Payee After Save* check box.
- *Delete Scheduled Stipend* permissions for the fund source are required to enable the *Delete* button.
- *Cancel Scheduled Stipend* permissions for the fund source are required to enable the *Cancel* / *Re-expect* toggle button.
- Permissions to access all fund sources listed are required to enable the *Calculate* button.

All stipend checks must pass validation before they are printed. An exception message is displayed for each check that is not validated. Access Exception Processing to resolve the issues associated with each check.

Scheduling and Disbursement

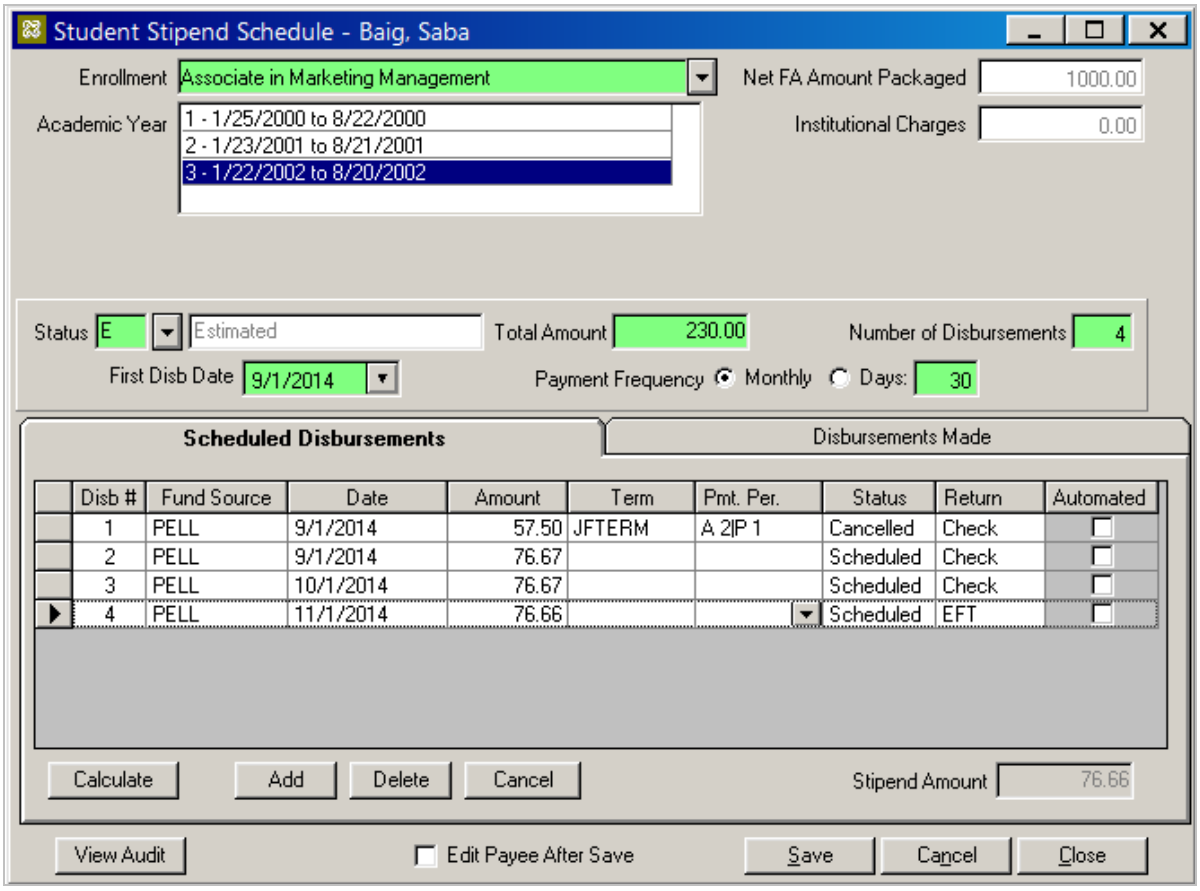
You can allow stipends to be scheduled whether the institutional charges exceed the amount packaged. You can also allow stipends to be posted and issued to the student before the funding is received on the ledger card. You can define these rules using the Student Accounts Settings form (Schedule Stipends, Disburse Stipends, and Limit Stipend Amount) and the Campus Information form (Stipends subtab).

You can schedule stipends through the Student Stipend Schedule form by navigating to the Financial Aid Packaging form (View > Financial Aid > Packaging > Add/Edit button > Stipends button) or directly via the View > Student Accounts > Stipend Schedule path (see below).

Note: Stipend schedules are canceled when a student's status is changed to "Drop". When the stipend schedule is canceled, you can no longer post the stipend disbursements to the ledger card.

To view, edit, or add a stipend schedule:

1. Select the student for whom the stipend schedule is to be maintained.
2. Navigate to **View** > **Student Accounts** > **Stipend Schedule**. The Student Stipend Schedule form is displayed.



3. Select the **Enrollment** for which the stipends are scheduled.
4. Select the **Academic Year** for which the stipends are scheduled.
5. Verify the accuracy of the amounts in the **Net FA Amount Packaged** and **Institutional Charges** fields. If the Institutional Charges are equal to or greater than the Net FA Amount Packaged, stipends cannot be scheduled.
6. Select the **Status** of the stipend schedule. The options are:
   - A- Approved
   - C - Canceled (You can cancel the entire schedule by selecting the **C - Canceled** Status.)
   - E - Estimated
   - H - Hold
   - P - Pending Approval
7. Specify the **Total Amount** of the scheduled stipend.
8. Specify the **Number of Disbursements** to be scheduled. The total amount is divided by the number of disbursements to arrive at the amount of each scheduled disbursement.
9. Select the date of the first stipend disbursement in the **First Disb Date** field. You can backdate a stipend schedule if necessary.
10. Select the **Payment Frequency**. If measured in days, specify the number of days between disbursements.

    Note: Since there are several places to access refunds and stipends in CampusNexus Student, multiple users might try to change one record at the same time. To prevent conflicts, CampusNexus Student locks the record

being updated. If another user tries to access the record, a message indicates that the record is locked along with the name of the user. The lock is released when the user closes the form. In certain scenarios, a system administrator may need to clear a locked stipend or refund record. For more information, see Unlock Refunds/Stipends.

Scheduled Disbursements tab

11. Click **Calculate**. CampusNexus Student fills in the grid with the scheduled disbursements.
    - The *Disb #* column identifies each stipend if there are multiple stipends in the same amount for the same fund source. The disbursement number is incremented with each new record created.
    - The *Date* field indicates the date that the scheduled disbursement will be sent.
    - The *Amount* field indicates the disbursement amount.
    - The *Status* field indicates the status of the disbursement.
    - The *Return Method* field indicates the method with which the disbursement is returned to the student.
    - The *Automated* field, when selected, indicates system generated auto stipends.
12. Click a cell in the **Fund Source** column and select the fund source for each scheduled stipend. The drop-down list shows only those fund sources that are packaged for the student and have a net amount received, or scheduled to be received, greater than zero.

    CampusNexus Student calculates this amount using the formula:

    ```
    (Amount scheduled to be received + Amount received) - (Amount of refunds made + Stipends made + Amount of scheduled refunds + Amount of scheduled stipends).
    ```

    The fund source for a stipend can be edited only if the status of the stipend is *Scheduled*.
13. Click a cell in the **Date** column to select a date.
14. Click a cell in the **Term** column to select a term.
15. The combo box in the **Pmt. Per.** column is available for enrollments with program versions that can use payment periods (program versions with academic calendars 1, 5, and 6). An academic calendar field included in the enrollment combo determines whether the payment period column and its drop-down list are displayed. The notation for Payment Periods is `AY<n>|PP<m>` where `<n>` is the academic year sequence number and `<m>` is the payment period sequence number.
16. Click a cell in the **Return** column to select a return method. The return methods are ACH, Check, EFT, and Net. If the return method is to be ACH, the fund source must be CASH and the institution must be set up for ACH processing.

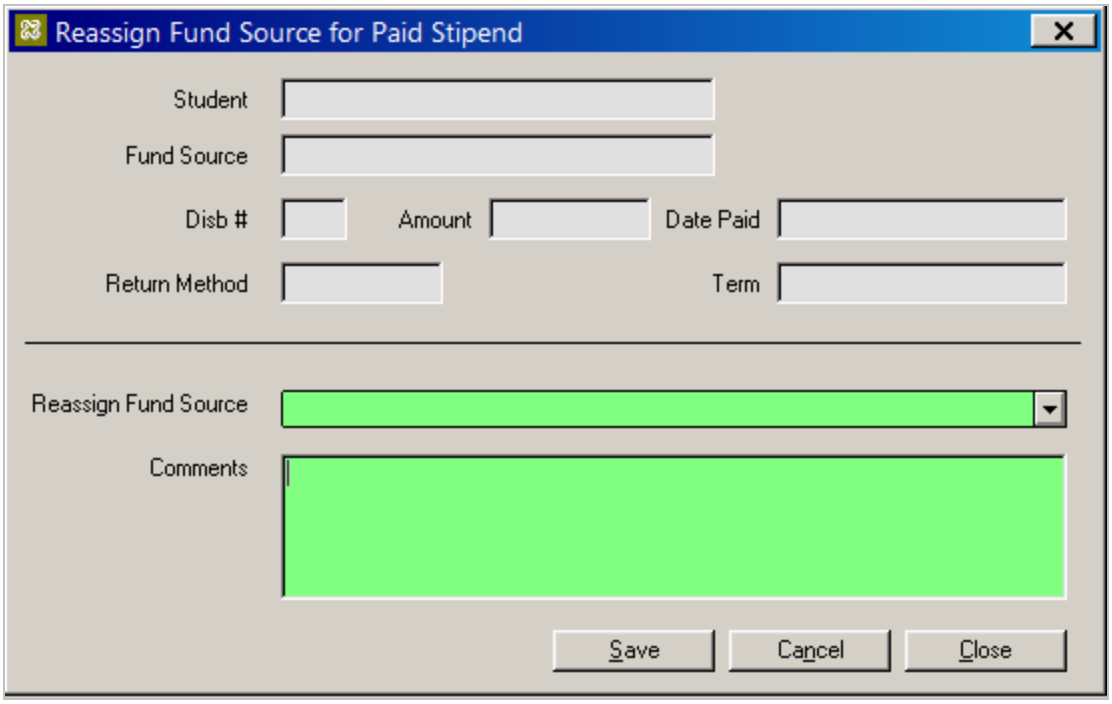
    Note: When adding a disbursement, the return method defaults to the default method that is specified for the Fund Source and Campus.
17. Click **Add** to add a new disbursement to the schedule.

    When you add a scheduled stipend, CampusNexus Student checks the *Limit Stipend Amount* flags.

    - If the flag is *Yes*, CampusNexus Student prohibits the amount of the scheduled stipend from exceeding the amount packaged for the selected fund source.
    - If the flag is *No*, CampusNexus Student allows the scheduled stipend regardless of the net amount packaged for the fund source.

    Note: If your institution has cleared the *Reduces Remaining Balance to Schedule* check box in the Fund Source Code Setup form, "Other" fund sources, paid directly to the student (such as VA benefits) will not be displayed in the grid, and you cannot schedule stipends.
18. Click **Delete** to remove a disbursement from the schedule.

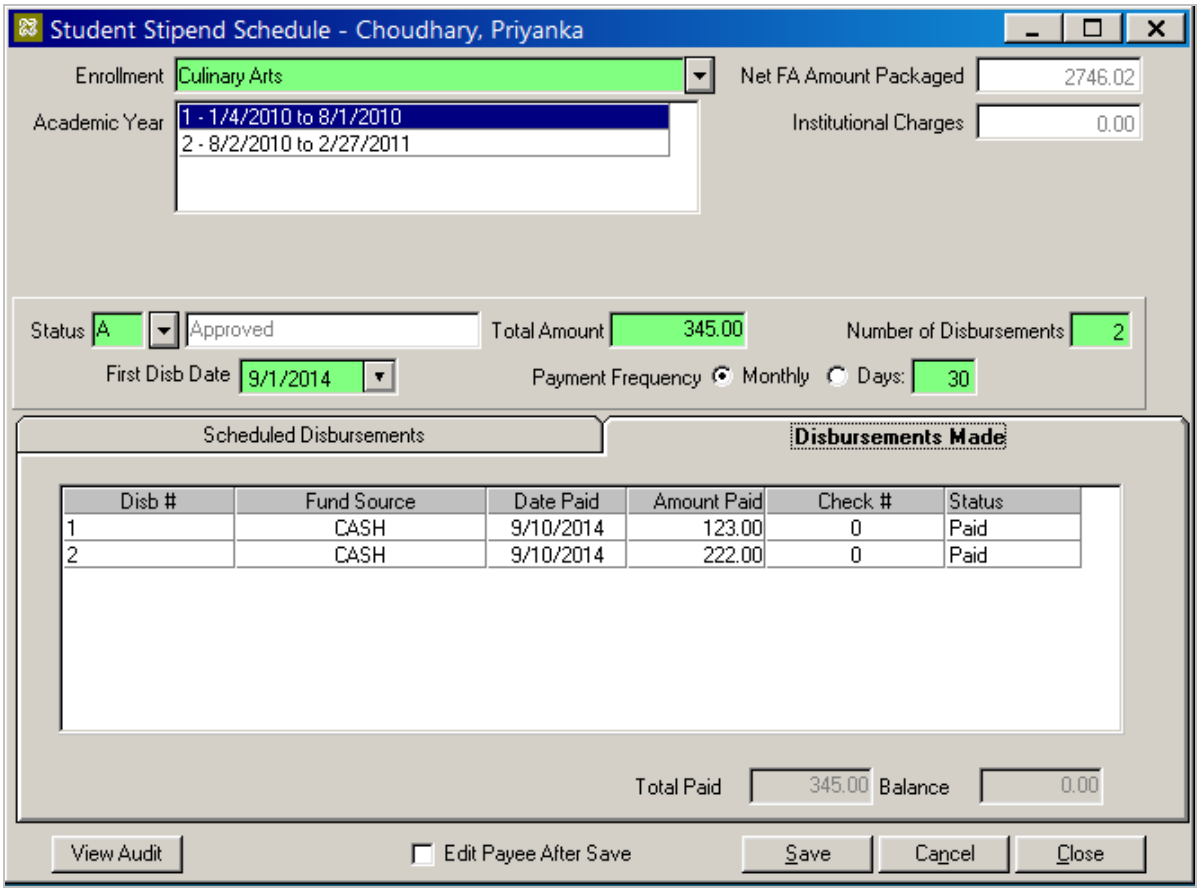
19. Click **Cancel** to cancel a disbursement but leave it on the schedule.
20. Click **Re-Assign** (enabled only for paid stipends) to select a different fund source for the posted stipend. This option does not affect the amount or the term/payment period of the posted stipend. This process voids the original stipend posted and reposts a new stipend with the updated selected fund source. The ledger card will reflect the changes.



    a. Select a fund source from the **Reassign Fund Source** list. Only fund sources that meet all defined rules are listed. The fund source that was originally used to disburse the stipend is not included in the list.
    b. Specify a **Comment**.
    c. Click **Save** to re-assign the fund source.
21. Click **Edit Payee After Save** to change the payee information when processing a stipend check.
22. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Disbursements Made tab

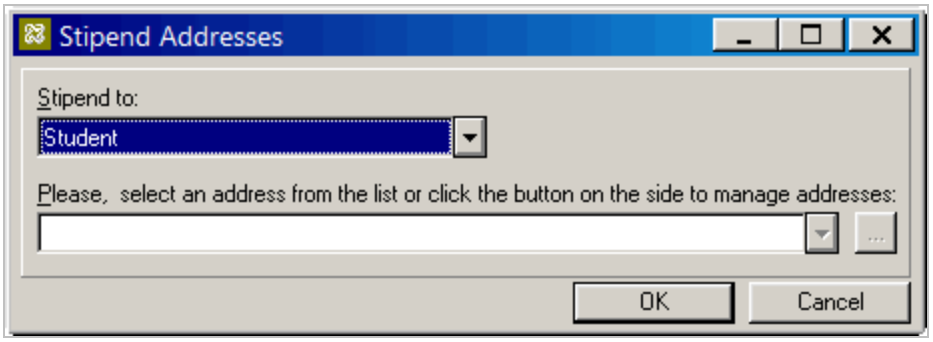
23. Click the **Disbursements Made** tab to view the stipend disbursements paid to the student from the previously established schedule. Data on this tab is read-only.



- *Disb #* identifies each stipend if there are multiple stipends in the same amount for the same fund source. The disbursement number is incremented with each new record created.
- *Fund Source* represents the fund source from which the stipend disbursement was paid.
- *Date Paid* is the date on which the stipend disbursement was paid.
- *Amount Paid* is the amount that was paid.
- *Check #* is the number of the check used to pay the stipend disbursement.
- *Status* is the status of the disbursement, such as Paid, Scheduled.
- *Total Paid* is the total amount paid to date.
- *Balance* is the balance of the scheduled stipends remaining to be paid.

Note: When CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll, the check printing functionality is disabled in CampusNexus Student and checks are printed from CampusNexus Finance, HR & Payroll. The *Date Paid* and *Check#* fields in the Disbursement Made tab will reflect data returned from CampusNexus Finance, HR & Payroll. For more information, see Stipend and Refund Check Printing (CampusNexus Finance, HR & Payroll).

24. Select **Edit Payee After Save** to change information about the student to whom the stipend is paid. The Stipend Addresses form is displayed.

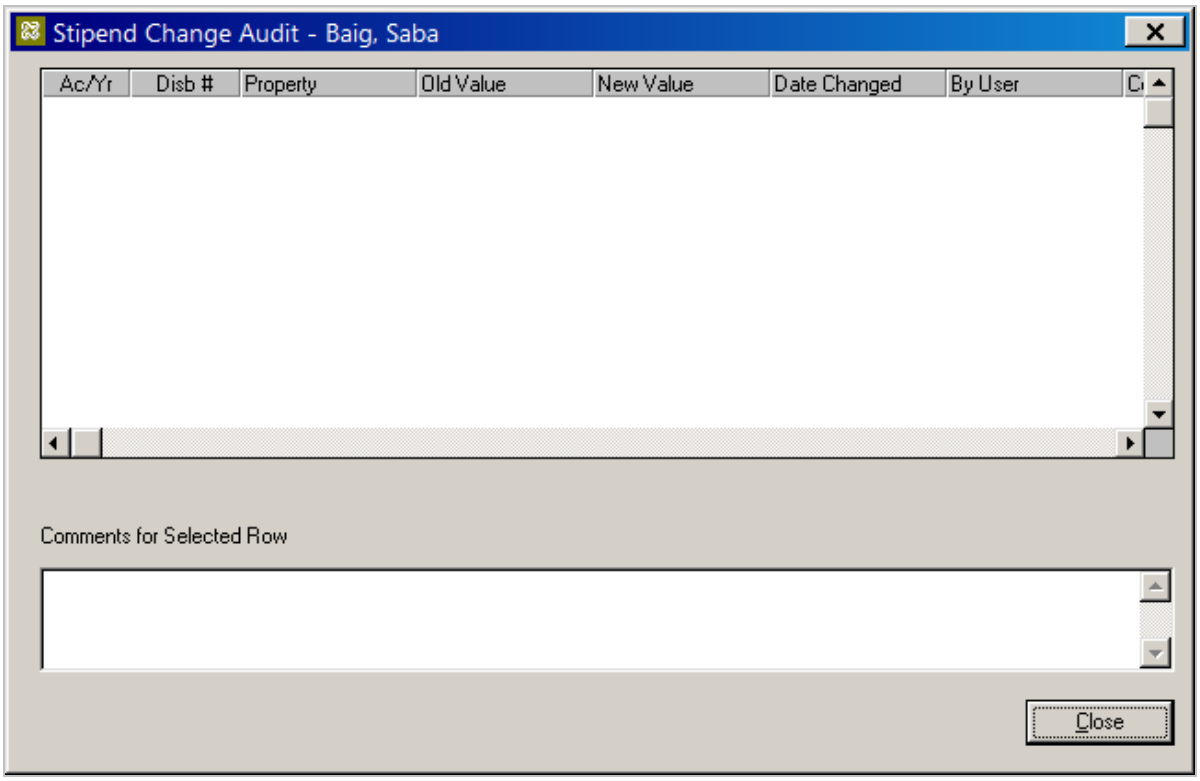


a. Select a value in the **Stipend to** field.

b. Select or add an **address**.

c. Click **OK**. The message *Payee information was successfully saved* is displayed. Click **OK**.

25. Click **View Audit** to track users that have used the Reassign option or adjusted the Payee on the stipend record. The Stipend Change Audit form displays the academic year, disbursement number, property, old value, new value, date changed, user name, and comments.



Revenue Ledger

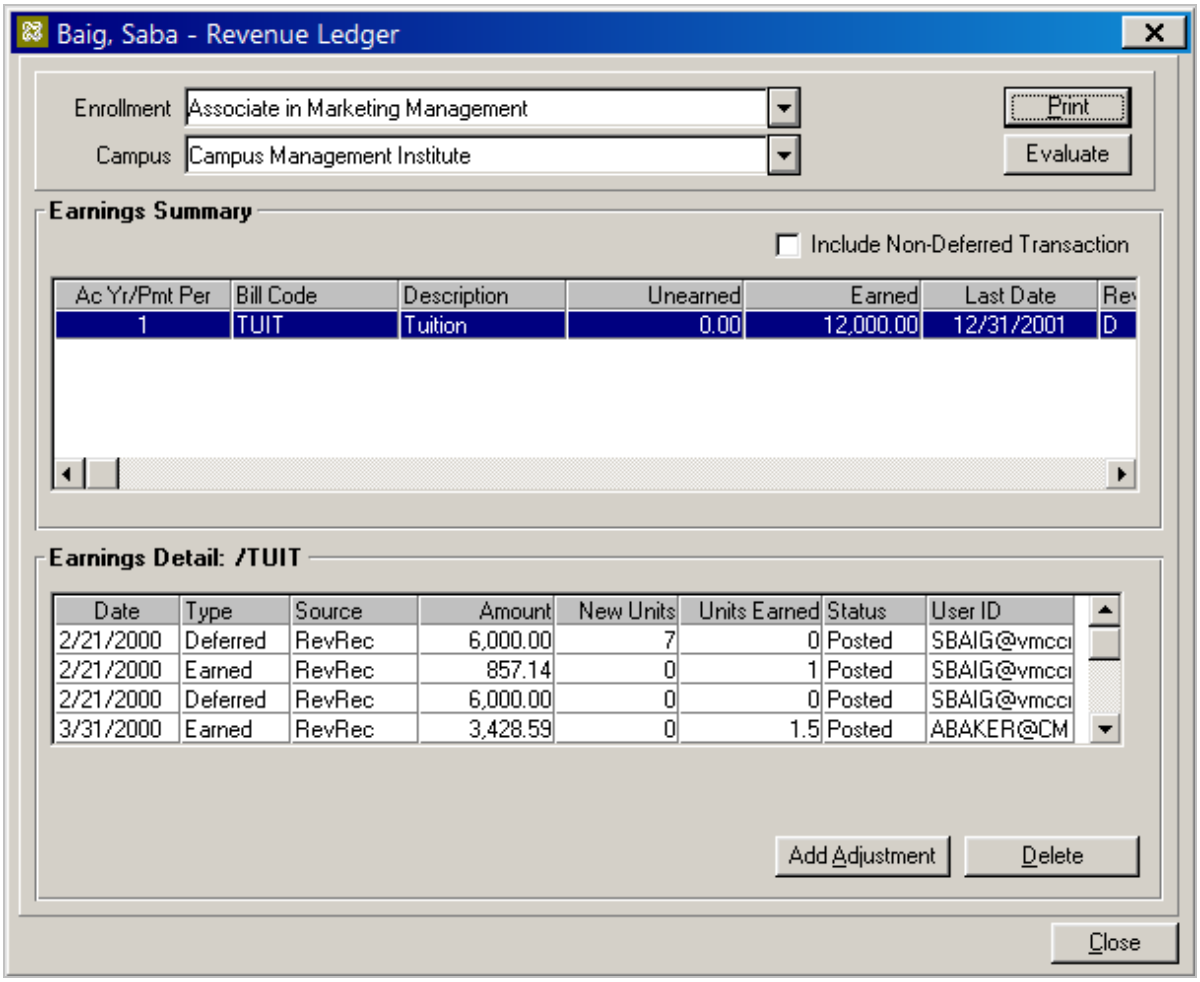
The student's Revenue Ledger shows a list of revenue recognition transactions generated by CampusNexus Student and attributed to the selected student. Detail transactions are added to the ledger each time the Revenue Recognition procedure is processed, typically once a month. The Billing Method for the student is also a factor as to when entries appear in the Revenue Ledger. The transaction codes that show up in this ledger are those that are flagged as deferred revenue transactions when they are set up. See Lists > Student Accounts > Transaction Codes.

It is possible to make adjustments to the student's Revenue Ledger. This may be necessary if data conversion is not as precise as you might wish. You can also print a report of the student's revenue ledger. Once the revenue recognition values in CampusNexus Student are reconciled to your general ledger, you should not have to make adjusting transactions.

The "Units" referred to on these forms are the earning units from the billing method. If your institution is billing for a nine-month program and earning one-ninth of the program tuition per month, a unit is one month and total units will be nine. When making an adjustment, it is possible to adjust only the units, by adding or subtracting one or more units, or by changing the total units. (Keep in mind that this is on a student-by-student basis.)

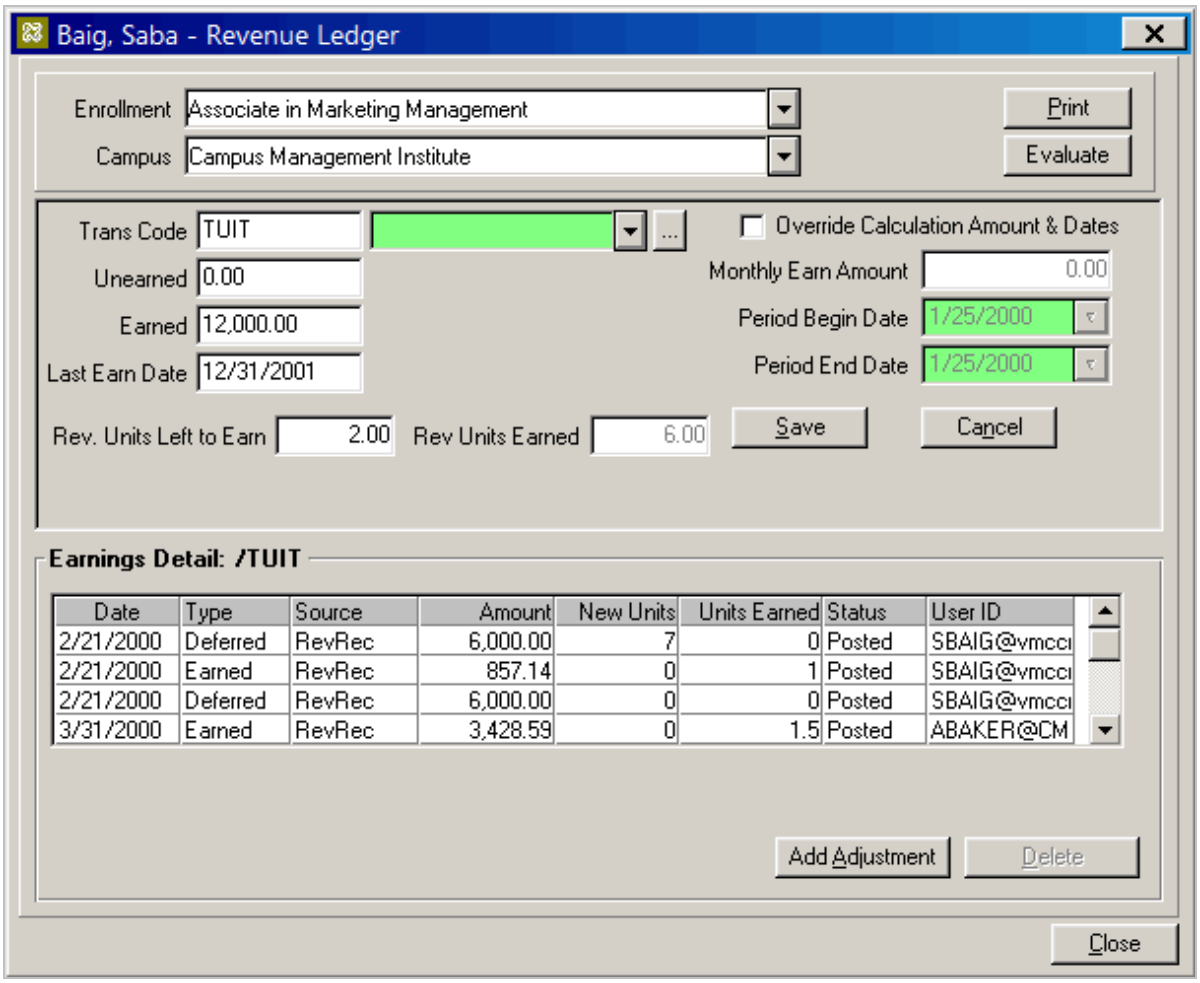
To add an adjustment entry to the student's Revenue Ledger:

1. Select a student.
2. Navigate to **View > Student Accounts > Revenue Ledger**. The Student Revenue Ledger form is displayed.

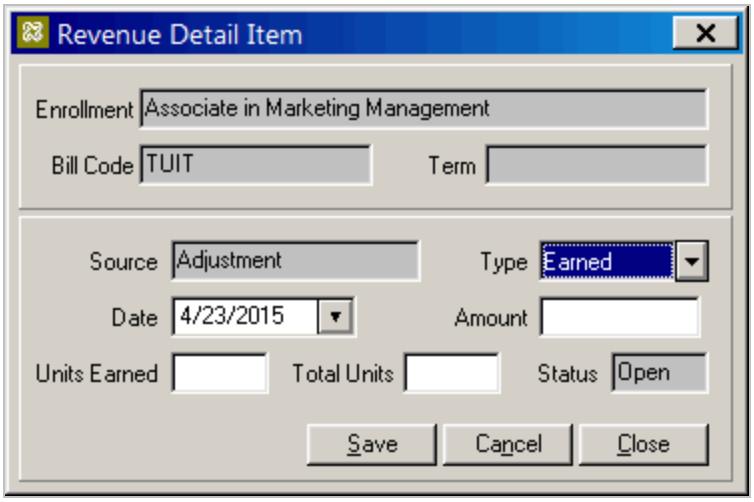


Note: When a bill code transaction is set up to earn over the life of a course, the **Description** column displays the **Course Section: Description**. If not, the description found in the SABillCode table is displayed.

3. Select the **Enrollment** for which the adjustment is to be made. The **Earnings Summary** data for the enrollment is displayed in the top grid on the form. If you click on a summary line in the top grid, the detailed entries that make up the summary are displayed in the lower grid.
4. If the student is enrolled at more than one campus, select the **Campus** to be viewed. If a student takes courses at more than one campus, and the institution bills by term, a student will have deferred revenue for each campus. If the Campus drop-down list is disabled, it indicates that the student is associated with only one campus.
5. Double-click a line in the Earnings Summary grid. The form changes to display more detail and the following editable fields:
   - **Term** - Use the drop-down list to the right of the Transaction Code to select a term. If the term does not appear in the list, click ... to the right of the drop-down to select a term.
   - **Override Calculation Amount & Dates** - Authorized users can override the revenue calculation on a student-by-student basis. Double-click a row on the Earnings Summary grid to display a form on which you can check a box to override the calculated amount and the related dates. When you check the box labeled Override Calculation Amount & Dates" you can enter new values in the Monthly Earn Amount, Period Begin Date, and Period End Date fields. Click **Save**.



6. Click **Add Adjustment**. The Revenue Detail Item form is displayed.

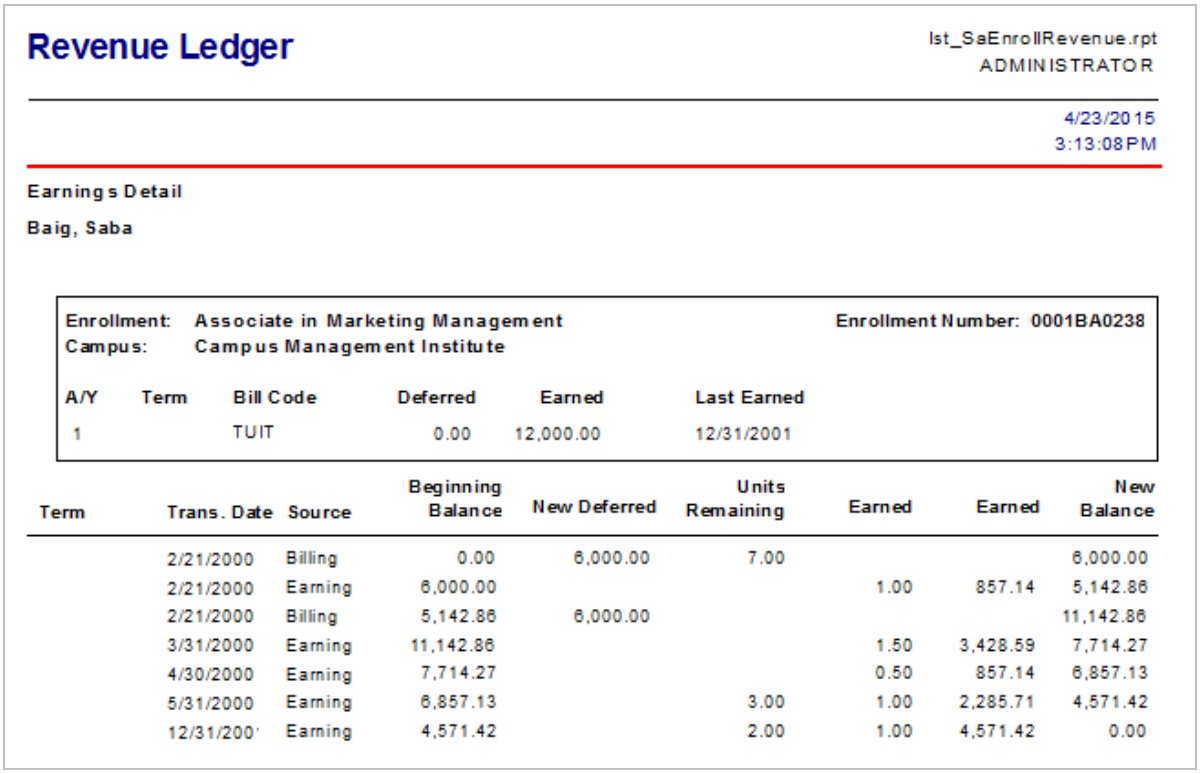


7. Enter the **Adjustment Detail Information**.

Fields Descriptions

Field	Description
Enrollment	The enrollment to which the adjustment applies. Read-only.
Bill Code (Transaction Code)	The transaction code to which the adjustment applies. Read-only.
Term	The term to which the adjustment applies. Read-only.
Source	The source of the transaction. **R** = Revenue Recognition Calculation; **A** = Adjustment. Read only.
Type	Select the adjustment type. The options are Future or Earned. Only the Earned type will affect general ledger balances.
Date	Enter the effective date of the adjustment. When adding an adjustment, the default is today's date. CampusNexus Student checks the minimum transaction date for the campus. It does not allow an earlier transaction date to be entered.
Amount	Enter the amount of the adjustment. It is acceptable to post with a zero amount to adjust the units.
Units Earned	Enter the number of units earned as a result of this adjustment.
Total Units	Enter the total units
Status	The status of the adjustment. Read-only. Status options are **Open** or **Posted**.

8. Click **Save** to save the adjustment transaction and return to the previous form.
9. Click **Print** to print a report of the revenue ledger.



Revenue Ledger

lst_SaEnrollRevenue.rpt
ADMINISTRATOR

4/23/2015
3:13:08PM

Earnings Detail

Baig, Saba

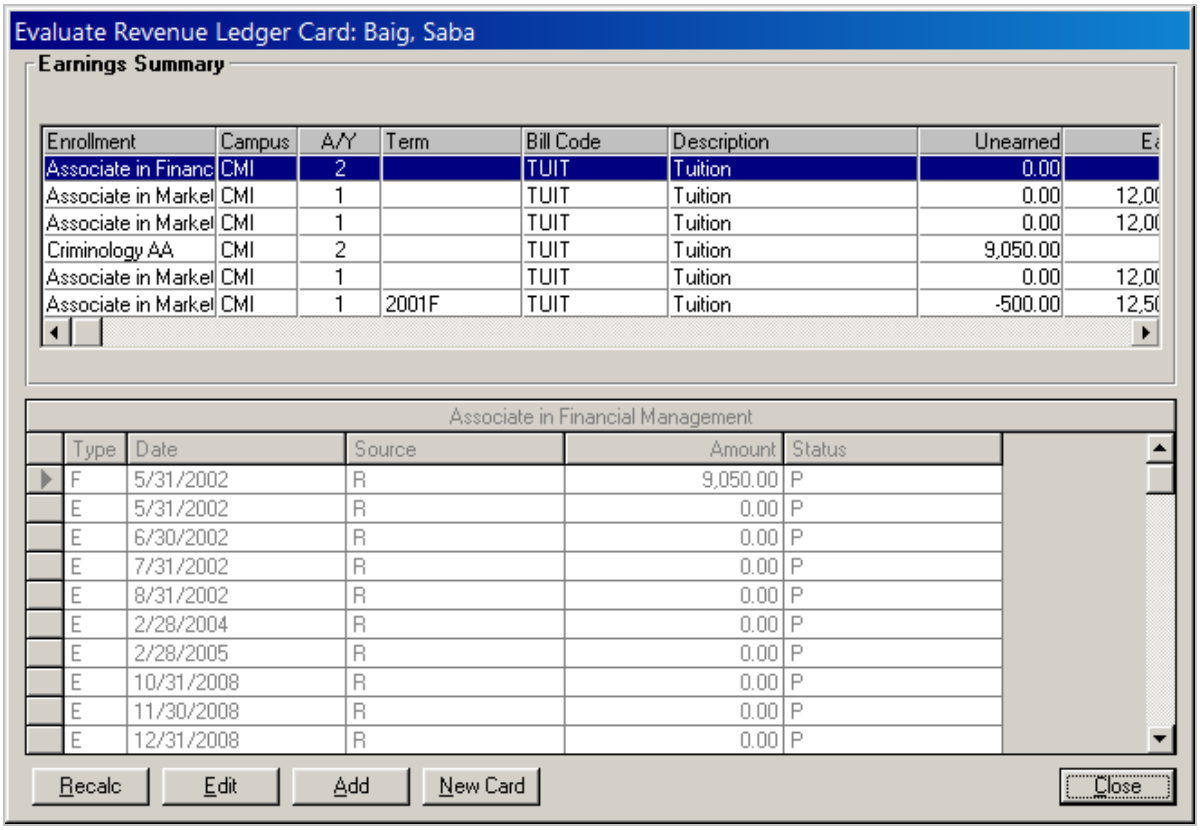
Enrollment: Associate in Marketing Management
Campus: Campus Management Institute
Enrollment Number: 0001BA0238

A/Y	Term	Bill Code	Deferred	Earned	Last Earned
1		TUIT	0.00	12,000.00	12/31/2001

Term	Trans. Date	Source	Beginning Balance	New Deferred	Units Remaining	Earned	Earned	New Balance
	2/21/2000	Billing	0.00	6,000.00	7.00			6,000.00
	2/21/2000	Earning	6,000.00			1.00	857.14	5,142.86
	2/21/2000	Billing	5,142.86	6,000.00				11,142.86
	3/31/2000	Earning	11,142.86			1.50	3,428.59	7,714.27
	4/30/2000	Earning	7,714.27			0.50	857.14	6,857.13
	5/31/2000	Earning	6,857.13		3.00	1.00	2,285.71	4,571.42
	12/31/200	Earning	4,571.42		2.00	1.00	4,571.42	0.00

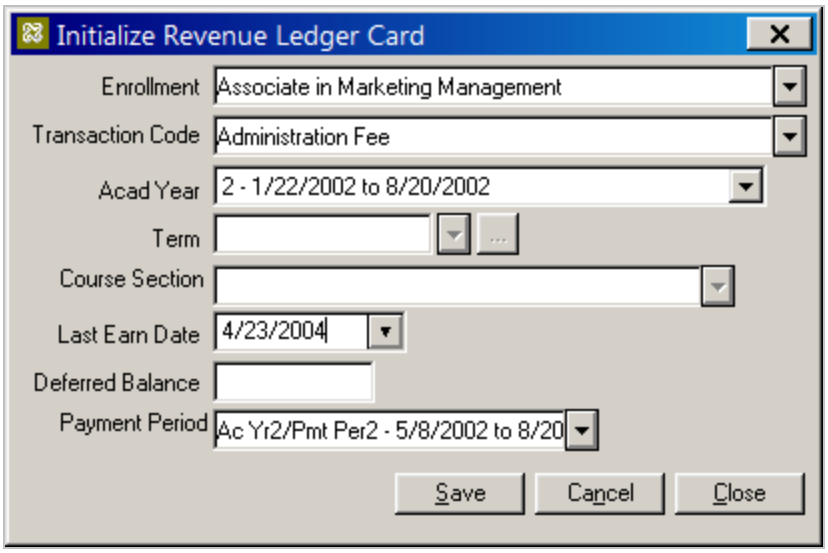
10. The Evaluate button is visible only if you have "Delete" Authority on the Revenue Ledger card.

    Click **Evaluate**. The Evaluate Revenue Ledger Card form for the selected student is displayed. You can edit header and detail amounts and dates, and recalculate header values. This tool is mainly for data cleanup, new campus startup, etc., to clean up data errors regarding revenue.



Note: When a bill code transaction is set up to earn over the life of a course, the **Description** column displays the **Course Section: Description**. If not, the description found in the SABillCode table is displayed.

11. To create a new Revenue Ledger Card, click **New Card** on the Evaluate Revenue Ledger Card form. The Initialize Revenue Ledger form is displayed.



12. Select **Enrollment**, **Transaction Code**, **Course Section**, and **Last Earn Date**.

Note: The Course Section drop-down list is enabled when the following criteria are met:

- Billing Method is set to 'Bill by Course'.
- Earning Method is set to 'Course Section'.
- Transactions are posted to the ledger under a 'TUIT' code.

13. The **Acad Year** and **Term** fields are controlled by the billing method for the enrollment.
    - If the enrollment is billed by Academic Year, the Acad Year field is enabled.
    - If by Term, the Term field is enabled.
    - If by Program, Acad Year and Term are disabled.
14. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. You are returned to the Evaluate Revenue Ledger Card form. The new Revenue Ledger Card is added to the Earnings Summary grid.
15. Click **Recalc** to recalculate the earnings summary.
16. Click **Close** to close the form. You are returned to the Revenue Ledger form.Click **Close** to close the form.

Unscheduled Payments

To schedule a payment that has not yet been scheduled for a student:

1. Select an active student.
2. Navigate to **View > Student Accounts > Ledger Cards > Transactions** (tab), and click **Post Payments**. The Post Payments form is displayed.
3. Select an **Acad Year**.

   Make sure that the 'Scheduled Financial Aid Disbursements/Scheduled Student Cash Payment' option *does not* contain a check mark. This allows you to make unscheduled payments.

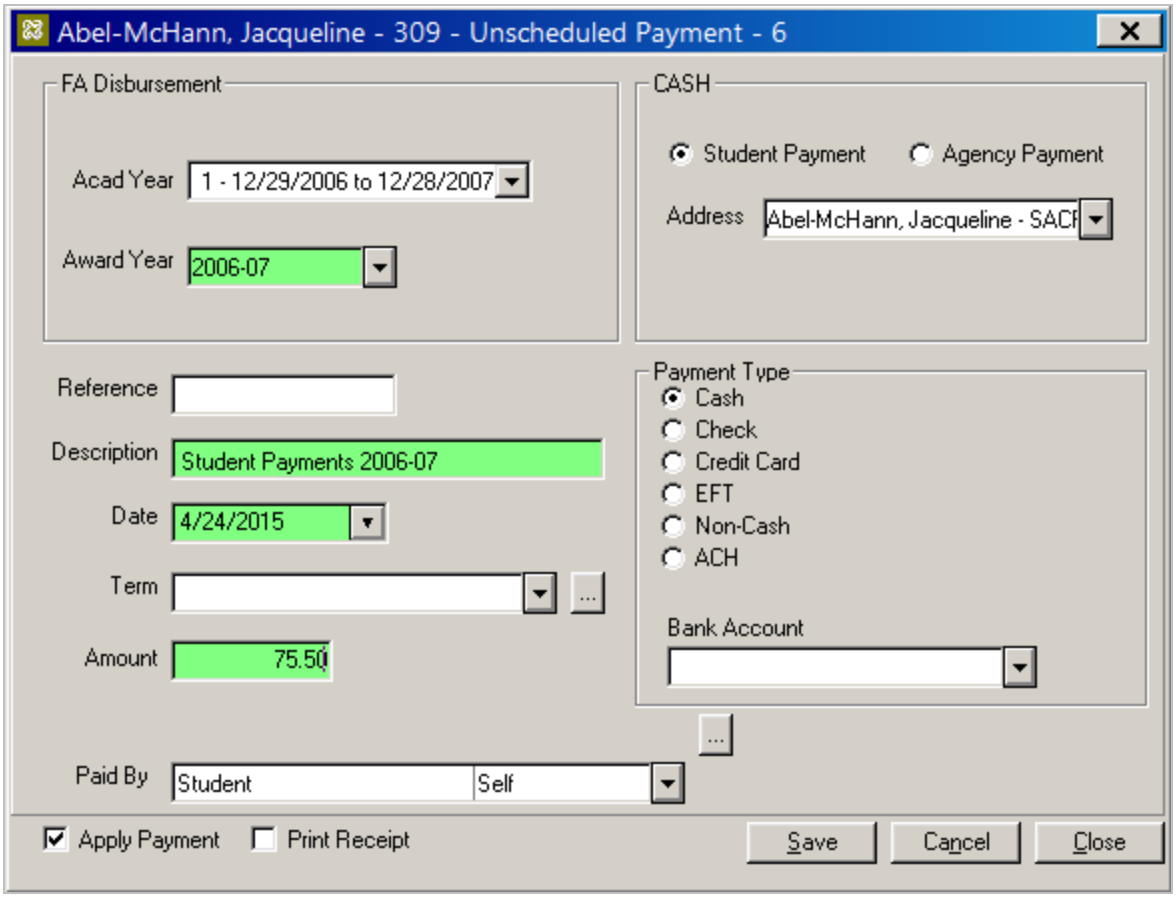
   Note regarding the **Payment Period** field:

   This combo box is available for program versions that can use it (program versions with academic calendars 1, 5, and 6). When Academic Year is selected, this combo box dynamically filters out academic years other than the selection. If the Academic Year box is cleared, all payment periods are available for selection. If no payment periods exist, the combo box is not displayed.

   Conversely, when Payment Period is selected, the Academic Year is auto populated. If Academic Year is modified after Payment Period is selected, this field is cleared and validated during save.

   The notation for Payment Periods is `A<n>|P<m>` where `<n>` is the academic year sequence number and `<m>` is the payment period sequence number.
4. Select a **Source**. The Unscheduled Payment form is displayed.

   The Source list contains fund sources that are associated with the selected academic year. Deactivated fund sources that are associated with the academic year selected are not listed and therefore cannot be processed.



5. On the Unscheduled Payment form, select the **Award Year**. The fund source Description is updated with the award year.

   If you select an award year that contains a deactivated fund source, a message appears in red indicating that the selected fund source for the award year is deactivated and cannot be processed.

6. Fill in the **Amount** field with the amount of the current payment.

7. Optional: Select **Apply Payment** and **Print Receipt**. See Payment Adjustments for additional information.

   Note: This box will only be visible if Auto Apply Using Hierarchy is selected for 'How Should Payments Be Applied?' in the Campus Configuration Accounting tab (Setup > Campus Locations > Add/Edit Campus > Accounting (tab)).

8. Click **Save** to retain the changes, apply the payment (if selected), print the receipt (if selected) and close the form, or click **Cancel** to reset the form to its default settings, or click **Close** to close the form without saving changes.

Refund Calculation

When a student drops out of school, there is often a need to refund money to one or more fund sources. Make sure that you set up Refund policies. The Department of Education requires that you choose the refund policy that returns the most money to the fund sources; in other words, the policy that best benefits the student. As discussed under the setup topic, there is a selected order in which refunded money is distributed to the fund sources. Once your institution's refund policies are established in CampusNexus Student, you can use this option to calculate the best refund for the selected student.

CampusNexus Student has an Automate Refund Calculation setting. When enabled, CampusNexus Student calculates a hypothetical refund for the student, and tracks the progress of the refund process via Drop reports. This field is tied to and populates the Expected Refund Process Date on the Refund Calculation form.

For policies based on hours attended, CampusNexus Student calculates the sum of the student's actual hours attended.

The refund calculation, when based on hours scheduled, includes dropped classes when calculating hours scheduled and hours attended.

The refund calculation based on hours scheduled and hours attended reads data from the attendance table to find hours attended and hours absent. The procedure uses the enrollment schedule to calculate the total scheduled hours for the period.

When calculating the percentage of tuition to retain or refund, if the condition in the policy that matches the student has a Refund Percent Flag = P (indicating pro-rata), the percentage to retain will be the percent completed by the student.

CampusNexus Student uses the unit specified in the Refund Grid Attendance Unit instead of the Refund Policy Attendance Unit if the student's criteria matches a Calculation based on Length condition.

Note: CampusNexus Student provides functionality that automatically rounds Direct Loan funds per COD requirements, and allows configuring Pell and other COD Grants to be rounded as defined in the FSA Handbook. CampusNexus Student recognizes the new configuration and makes the appropriate adjustments when posting the Refund Calculation.

Highlights of this feature include:

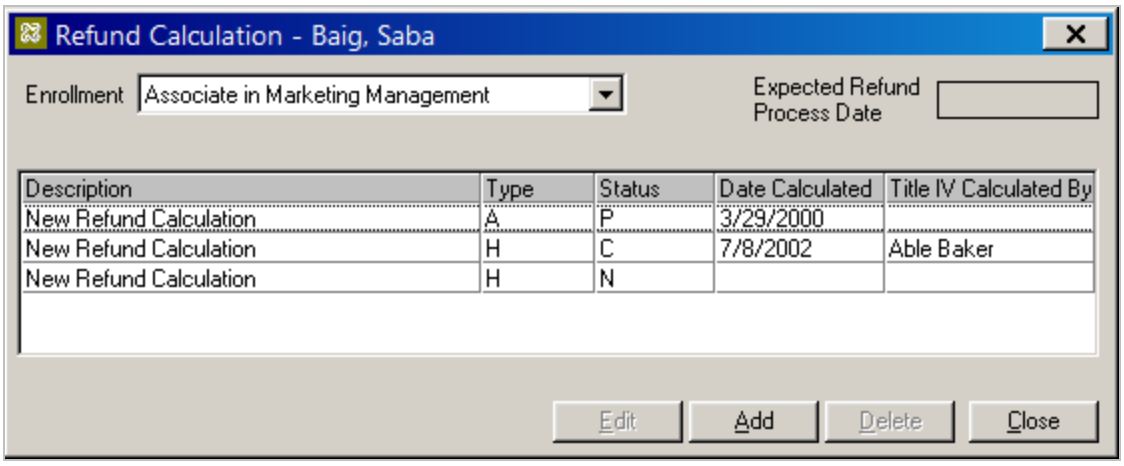
- Configuring rounding to be activated within the Refund Calculations for refund amounts, and for it to be applied when the results from the refund calculation are posted (i.e., the refund calculation results may show a particular fund with cents, but when the results from the refund calculation are posted and refunds are scheduled, the rounding logic is applied rounding the amount to the nearest dollar).
- Ensuring the rounding percentage that is used is within the Refund Calculation for refund amounts per the percentage guidelines as defined in the FSA Handbook, so that rounding percentages are applied correctly when a refund amount is created. The configuration within the Fund Source configuration, the option ‘Round All Disbursements to Whole Dollars’ on the Fund Source Code Setup form, is used for disbursements and refunds to determine if the amount is to be refunded in whole dollars (selected) or not (not selected).
- Allowing the refund amount that is created from the Refund Calculation to be visible to the user and clearly explained so that the user understands any rounding implications, such as the specific amounts that will be used across all forms and processes in CampusNexus Student. For example, the Scheduled Refund Report will reflect the rounded amount so that clients can see the result of the rounding.
- Posting a Refund Calculation for the refund amount that is created (Daily > Student Accounts > Process Refunds/Stipends) to be the rounded amount, so that the amounts posted through the wizard are accurate.

Please read Return of Title IV Funds when calculating a refund involving Title IV funds. See also Tracking NDS students.

To process the refund for a selected student:

1. Select the student for whom the refund is to be calculated.
2. Check the student's status and make any necessary changes.

3. Navigate to **View** > **Student Accounts** > **Refund Calculation**. The initial Refund Calculation form is displayed. If any previous refund calculations have been processed for this student, they are listed on the grid. The Expected Refund Process Date field shows the deadline for processing refunds.



4. Select the **Enrollment** for which the refund is to be processed. If the student is a lead who has not yet enrolled, select **All Enrollments**.

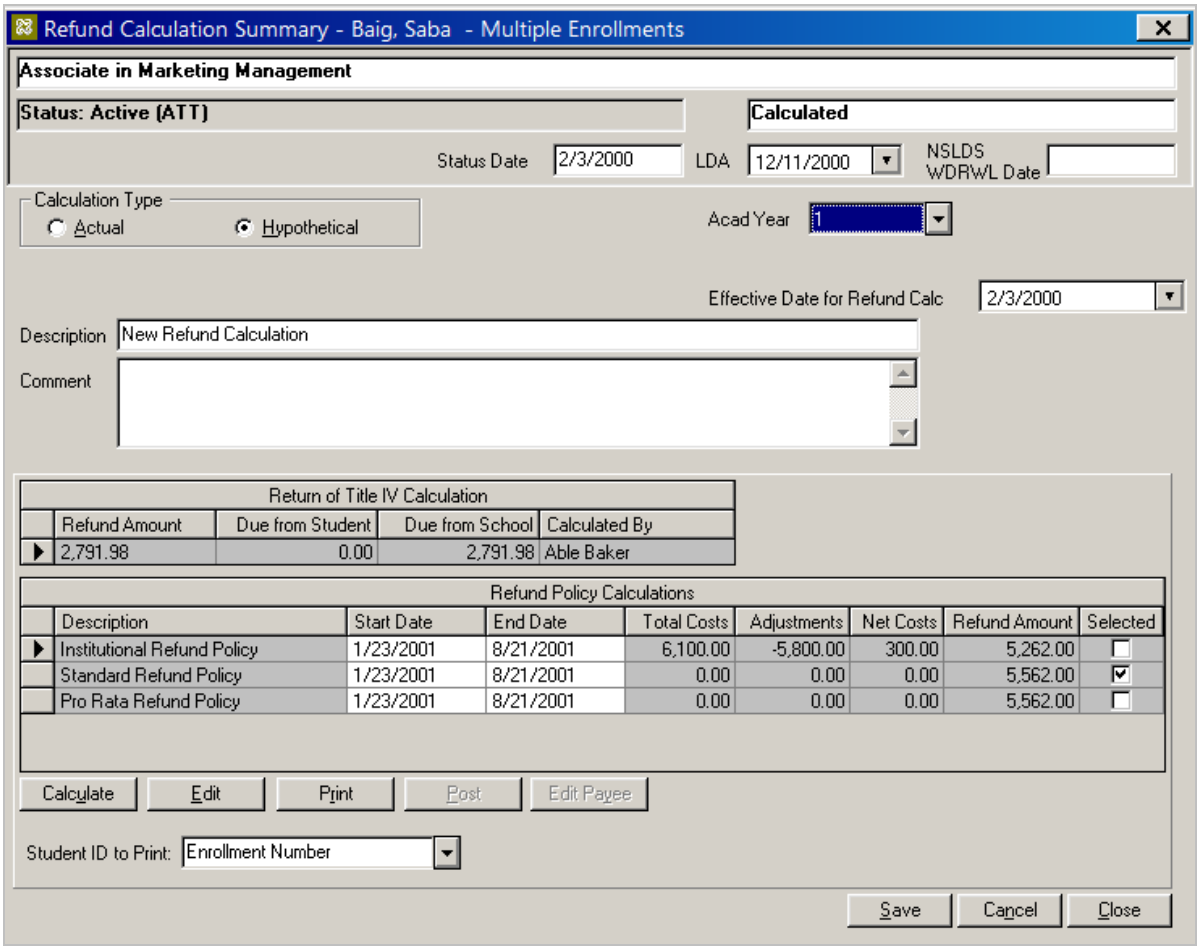
5. Click **Add** to process a new refund calculation, or select a previously calculated refund and click **Edit** to work with it. The Refund Calculation Summary form is displayed.

Note: You can navigate to other areas of CampusNexus Student to verify student information, while using the Refund Calculation wizard.

The following rules apply when you leave the refund calculation form and return:

- If the Return of Title IV Funds Calculation wizard is active, you can navigate to other areas within the application without having to close the wizard.
- You can navigate to other areas within the application from any step within the Return of Title IV Funds Calculation wizard.
- Navigating to other forms within the application while the Return of Title IV Funds Calculation wizard is active will not affect any date previously entered within the wizard.
- If changes are made within the application that will affect the Return to Title IV Funds Calculation data, those changes will be reflected within the Return to Title IV Funds Calculation wizard when focus is returned back to the form. Any data or selections that had been entered manually up to that point will be retained if still applicable.

Menu options such as Lists, View, Daily, etc., are enabled so that you can navigate to other areas of CampusNexus Student while leaving the Refund Calculation form open.



Note: If the student is enrolled in a program version with academic calendar 5 or 6 and billed by payment period, the combo box for **Term** is replaced by the **Payment Period** combo box. If the student is enrolled in a program version with academic calendar 1, both **Term** and **Payment Period** combo boxes will be available. The drop date is used to determine the default value of the Payment Period combo box. The drop date must fall between the start and end dates of the default payment period. When a payment period is selected, the start and end dates are used as the start and end of the R2T4 calculation period.

This field is visible on the Refund Calculation Summary form only when the R2T4 has been calculated on a new calculation or when user edits an existing Refund Calculation which contains a R2T4 calculation. For more information regarding the 'Date Student Ceased Attending' field, see Step 1 of the R2T4 Worksheet in Return of Title IV Funds.

6. Select **Actual Refund** or **Hypothetical Refund**. You can run the hypothetical refund, print the report to use for discussion purposes, and run the actual refund later.

7. When running a hypothetical refund, the **LDA** field can be edited to any desired date, including a future date. The hypothetical refund calculation calculates the time completed based on the LDA entered; however, when the Refund Calculation form is set to calculate an Actual Refund, the LDA field will contain the student's actual Last Date of Attendance and may not be changed.

   If, while performing a Hypothetical Refund, the LDA is changed from it's original value, the following message is displayed: *"Do you want to update Effective Date for Refund Calc with LDA?"*

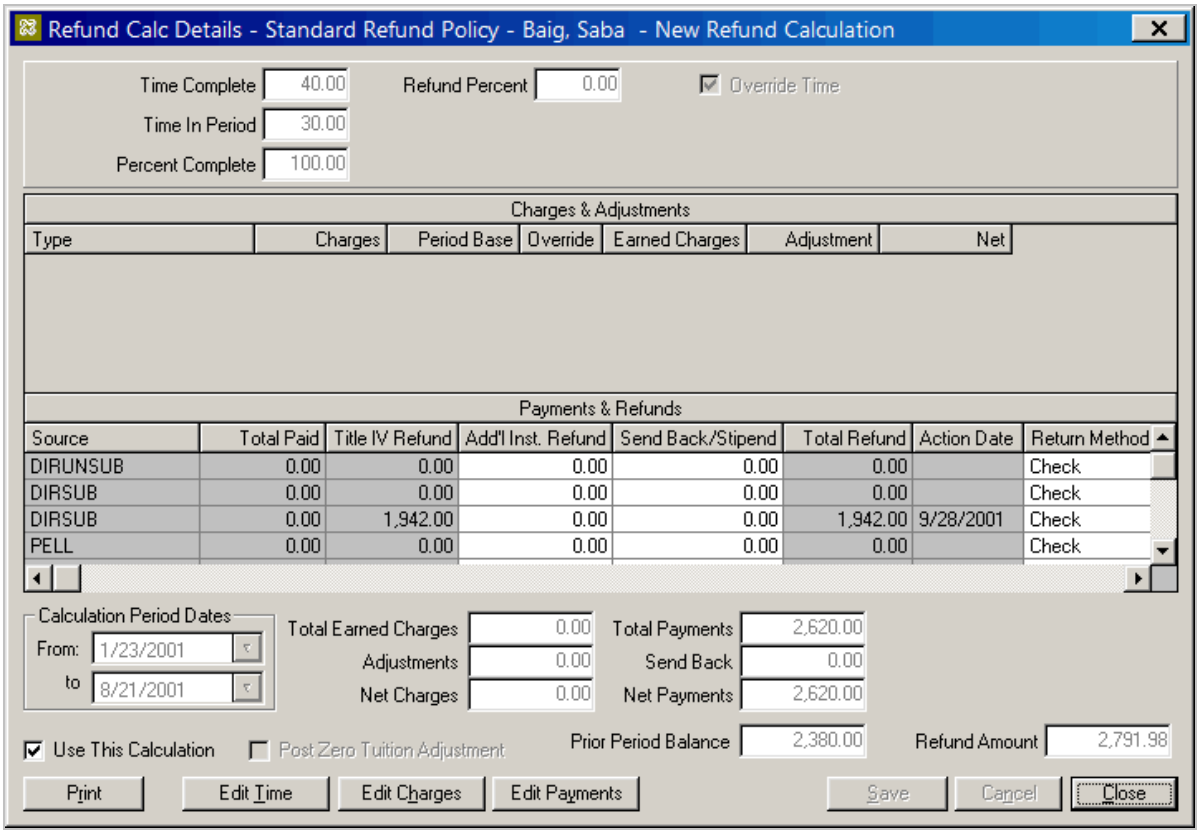
- If you select **Yes**, the 'Effective Date for Refund Calculation' is set to the new LDA.
- If you select **No**, the 'Effective Date for Refund Calculation' is not changed.

Note: For perpetual terms, you will be prompted for calculation period begin and end dates. The dates are needed to determine the period of enrollment for the refund calculation.

8. The NSLDS Withdrawal date is populated only when a Refund Calculation is being calculated for a withdrawn student and cannot be edited. The Actual Refund calculation will calculate the time completed based on the NSLDS Withdrawal Date.
9. Click **Calculate** to run the refund calculation process. CampusNexus Student displays the following message: *"All Refund Policies will be calculated. Ok to continue?"* Click **Yes** to continue.

   CampusNexus Student calculates the refund for each policy and select the result that is most favorable to the student.

   - If a previous Title IV Funds Calculation is found, the following message is displayed: *"Previous Title IV Calculation found. What would you like to do?"* You have the options to **View**, **Edit**, or **Recalculate** the previous calculation.
   - If there are no Title IV funds packaged for the student, the refund calculation is automatically populated, otherwise it is calculated upon completion of the Return of Title IV calculation.
   - If multiple refund policies have been configured and are active, CampusNexus Student automatically selects the calculation that is most beneficial to the student. You can modify the selected option by highlighting the policy and selecting **Edit**.
10. Click **Edit Payee** to display a **Refund Listing form**, which lists all the individual refunds associated with the posted and selected refund calculation. Click **Edit Payee** to change the payee information. Then click **Close**.
11. Click **Print** to print select the Print Summary, Print Detail, or Print Return of Title IV Report option.
12. If there are no institutional refund policies activated when **Calculate** is selected, CampusNexus Student will still calculate the Return of Title IV refunds. Conversely, if institutional refund policies are activated, they will be calculated once the Return of Title IV calculation has been completed.
13. To see the details behind any of the refund calculations on the summary grid, select the row and click **Edit**. The Refund Calculation Details form is displayed.



14. Click **Edit Payments** to edit the Credit Balance column with an amount (it must be less than the total paid amount) other than what was calculated. This is primarily for a refund that results in a credit balance to the student. Once an amount has been entered, you are warned that no further calculations on this refund option can be performed.

    If you agree, click **Save** to save the override amount for this calculation. Once the save is done, the Total Refund column is recalculated and the Refund Amount is updated on the form and on the Refund Summary form.

15. Select **Use This Calculation** if you determine that this is the best one for the student.

16. Click **Print** to print the Refund Calculation Detail report.

    Note: Transaction Codes used to post Adjustments are displayed on this report, as well as Payment Period and Academic Year sequence numbers.

17. If you are calculating an actual refund, click **Post** to post any charge adjustments to the student's ledger card. CampusNexus Student displays a confirmation message asking if it is OK to post the refund calculation. Click **Yes**.

    When you click **Post**, CampusNexus Student schedules the calculated refunds for the appropriate fund sources based on the calculation. You will not see any entry on the student's ledger card reflecting the refunds until they are actually processed.

18. After the posting procedure is completed, CampusNexus Student displays a confirmation message. Click **OK**.

    Other changes will appear on the **Refund Calculation** form. In the top right corner of the form, the status window changes to "Calculated and Posted". The **Post** button changes to **Undo Post**.

19. At this point, it is still possible to "undo" the refund that has been posted. Click **Undo Post** to return the student's records to their status before the refund was posted. If you click **Undo Post** after refund checks have been printed,

CampusNexus Student display s an "Automation error" message.

Once refund checks have been printed, you can no longer "undo" a refund calculation. Other accounting procedures must be employed to correct any misapplication of the refund calculations.

20. Click **Close** to close the form.

Note: The latest entry on the Student Ledger Card shows a refund posted after checks were printed.

Manual Refund Policy

If you do not have permissions to edit the manual refund policy (Allow User to Edit Manual Type Refund Calculations is turned off), the Refund Calc Details form is in display mode with the Edit Time, Edit Charges, and Edit Payment buttons disabled; however, if you have edit permissions for Non Manual Refund Policies, these permissions remain unchanged.

If you have permissions to edit the manual refund policy (Allow User to Edit Manual Type Refund Calculations is turned on), all editable columns on the Refund Calc Details form have a white background. The editable fields for a Manual Refund Policy are Time in Period, Time Complete, Refund Percent, Period Base, Earned Charges, Title IV Refund, and Add'l Inst Refund.

The **Print** button on the Refund Calc Details form is enabled whenever you edit a policy.

Refund Calculations

The manual refund appears in the Refund Policy Calculations grid. When you click Calculate, all policies, including the manual one will be calculated.

Only if you have permission to edit manual refunds will you be able to select the manual refund from the Refund Policy Calculations grid and edit it.

If you try to enter values greater than 100 or less than 0 for the data fields within the refund calculations for which Manual Calculation is selected, an error message states that the Refund Percent cannot be greater than 100 and less than 0. This also occurs if you enter values that are greater than 100 or less than 0 in the Time complete and Time in Period fields.

If the value for the Refund Percent is modified, the Earned Charges and Adjustments on the Charges grid is recalculated using the newly entered Refund Percent when the Tab button is selected. This calculation is done only for the record for which the Transaction code configured on the refund policy is of the type 'calc'; for Transaction code type other than 'calc', the value of Earned Charges, Adjustment and Net will not change.

When the Earned Charges are recalculated, CampusNexus Student multiplies *(100 minus the percentage entered in the Refund Percent field)* by the amount in the Period Base value on the Charges grid to determine the Earned Charges.

The Adjustment value is determined by subtracting the amount in the Charges column from the amount in the Earned Charges column.

You can calculate the value of **Total Earned Charges** by applying the formula:

'Total Earned Charges = Sum of the Total of Earned Charges in the Charges and Adjustments grid'.

Likewise, you can calculate the value of **Adjustments** by applying the formula:

'Adjustments = Sum of the Total of Adjustments in the Charges and Adjustments grid'.

The value of **Net Charges** can be determined by applying the formula:

'Net Charges = Sum of the Total of Net in the Charges and Adjustments grid'.

Note: Changing the value of charges changes the value of Adjustment, Net, Adjustments, and Net Charges according to the formula established for each category.

Refund Calculation Messages and Override Option

You can edit Period Base and Earned Charges when clicking **Edit Charges** for the refund policy for which Manual Calculation is selected, but if in the changed value the Earned Charges is greater than the Period Base, an error message states that the Earned Charges cannot be greater than the Period Base.

You can override the value of the Charges field by clicking on Edit Charges and then selecting the Override check box in the Charges and Adjustments section on the Refund Calc Details screen.

This is also the same operation that occurs when you manually enter and override values for the following data fields within refund calculations: Refund Percent, Time Complete, Time in Period, Period Base on Charges grid, Earned Charges on Charges grid, Title IV Refund on Payments grid, and Add'l Inst. Refund Amount on Payments grid.

When you click **Edit Payment**, you can change the value for the Add'l Inst. Refund and Title IV Refund on the Payments & Refunds grid, and the Total Refund amount will be recalculated. The Total Refund amount is calculated by determining the sum of the amount in the Add'l Inst. Refund Amount column and the amount in the Title IV Refund column.

If the changed value of the Add'l Inst. Refund or Title IV Refund is less than zero, a message states that the value in the Add'l Inst. Refund or Title IV Refund field cannot be less than zero.

If you click Edit Payment and change the value of the Title IV Refund and the Add'l Inst. Refund so that the sum of the Title IV Refund and the Add'l Inst. Refund is greater than the Total Paid amount, a message states that the Sum of the Add'l Inst. Refund and Title IV Refund cannot be greater than the Total Paid amount.

Note 1: Changing the value of refunds changes the value of Total Refund and Refund Amount according to the formula established for each category.

Note 2: When editing manual refunds, you cannot add line items to the Charges or Payment grids.

Refund Calculation Summary and Reports Selection - Drop Report

The Refund Calculation Summary report, Refund Calculation Detail report, and Drop report each display an indicator identifying refund calculations that were entered manually and the name of the person who manually entered the data for the manual refund calculation.

On the Refund Calculation Summary report and Refund Calculation Detail report, under the Policy header, the name of the policy is displayed and below the policy name, the caption 'Manual Policy Calculated by' displays with the name of the person who last manually changed the policy.

On the Drop Report, the name of the policy is displayed and the details of the items under Payments & Refunds are shown and just below the item details, the caption 'Manual Policy Calculated by' displays with the name of the person who last manually changed the policy.

Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

Audit Features

The audit features for Student Accounts include:

- CampusNexus Student stores the name of the payee on each refund record, stipend record, and subsidiary refund so that it can be retrieved for reporting purposes.
- CampusNexus Student audits changes to the payee for refunds and stipends. Auditing occurs from the time the refund or stipend is scheduled to the time the refund or stipend is processed. The date changed, time changed, and the user who made the change are audited.
- Payee changes are audited for subsidiaries.
- Payee information for a stipend can be edited regardless of the fund source associated with the stipend. The payee changes are audited for all stipends.
- Your ability to edit a payee for a refund is dependent on the fund source associated with the refund. The payee changes are audited only for the fund sources that allow the payee to be changed.
- You can sort on different columns of the grids available in the Process Refunds/Stipends wizard.

- A student account administrator can define that the Reference information is printed on the check, below the address, or on the stub, or in both places.
- A student account administrator can view the ID of the user who scheduled the refund/stipend using the Ledger Card, Transaction Detail button.
- CampusNexus Student stores the user ID of the user who scheduled the stipend so that it does not get overwritten by the user ID of the user who posted the stipend.

Return of Title IV Funds

CampusNexus Student can perform the Return of Title IV Funds calculation based on Department of Education's policy. Refer to the Department of Education (ED) Return of Title IV Funds calculation worksheets while reviewing this description.

The worksheets are titled:

- *Treatment of Title IV Funds When a Student Withdraws from A Credit Hour Program*
- *Treatment of Title IV Funds When a Student Withdraws from A Clock Hour Program*
- *Post-Withdrawal Disbursement Tracking Sheet*

These worksheets may be obtained from the ED web site at https://ifap.ed.gov/ifap/. Select *Worksheets, Schedules, & Tables* and look for *Return of Title IV Aid Worksheets*. Click the link to go to the page where the PDF files are located. The PDF document files are also distributed on the release disk.

Processing the Return of Title IV Funds

You must enable the Use Title IV Refund Calc? option to calculate the Return of Title IV Funds through CampusNexus Student.

See also SEOG Matching Percentage and Return of Title IV Funds Calculations Worksheets.

1. Access the Refund Calculation wizard and follow the instructions. Click **Calculate** on the Refund Calculation form to calculate the return of Title IV Funds.
2. Specify the calculation type as "Actual" if the student's status is Grad, Complete, or Drop.

   If the student's status is not one of these, the calculation type must be "Hypothetical".
3. The Refund Calculation form displays the student's drop date (if applicable).

   - If the student's status is Drop, the form displays the Enroll Status Date with a caption of "Date of Determination".
   - If the student's status is Grad or Complete, the form displays the Enroll Status Date with a caption of "Grad Date" or "Date Completed".

   The Refund Calculation form also displays the student's last date of attendance (LDA) and NSLDS Withdrawal Date (NSLDS WDRWL Date) on this form.
4. The Effective Date field can only be edited if a "Hypothetical" calculation is being done. The label is changed to "Hypothetical Drop Date". If an "Actual" calculation is being done, the effective date for the calculation will be the student's enrollment status change date.
5. If the student's program has a billing method of term or course, the term the student withdrew from must be identified or specified by you. Once identified, it is displayed.

   If the student's program has a billing method of academic year, the academic year from which the student withdrew must be selected/identified. The academic year number and date range are displayed on the form.
6. If the flag to use the Return of Title IV Funds calculation is set to yes, the calculation will be the first step in the refund calculation process. The result of this calculation will then "feed" into the standard refund calculations. The result of the Return of Title IV Funds calculation will be that Title IV money needs to be sent back to the lenders or Title IV money will still be received in the form of a post-withdrawal disbursement.
7. When an "Actual" calculation is selected (as opposed to "Hypothetical"), the Return of Title IV Funds calculation will only be done if the student's status is Drop. Even though the calculation type of "Actual" will be allowed for a Grad and Complete status, the Return of Title IV Funds calculation does not apply to students who have a Grad or

Complete status. If an "Actual" calculation type is being done, and the status is Grad or Complete, CampusNexus Student proceeds directly to the standard refund calculation method.

8. When an "Actual" calculation is being done, the Return of Title IV table is checked to see if a record already exists for the student's enrollment and drop date. If a record exists in the table, you are notified before proceeding and given the option of proceeding with the calculation (in which case the results will overwrite what is currently on file) or going on to the standard refund calculation using the result of the Return of Title IV Funds calculation already on file.

Some initial data values will be determined before performing the Return of Title IV Funds calculation.

1. The date of the institution's determination that the student withdrew. If an "Actual" calculation is being done, this date will be set to the student's drop date on file. If a "Hypothetical" calculation is being done, the date of determination will be whatever you selected for the "Hypothetical Drop Date".
2. If a 'Hypothetical" calculation is changed to an "Actual" calculation, CampusNexus Student checks if the LDA on the Refund calculation is equal to the student's drop date on file. If it is not equal, a message indicates that the Hypothetical refund may not be converted to an actual refund calculation. Once the LDA has been edited to reflect the drop date on file, the "Hypothetical" calculation may be converted to an "Actual" calculation.
3. The period to use for the calculation will be one of two values: Title IV Payment Period or Period of Enrollment (P = Payment Period, E = Period of Enrollment). This value is determined by looking at the academic calendar definition for the program version the student is or was enrolled in and, if needed, the billing method for the program. To determine the Period to use for the calculation, CampusNexus Student performs the following checks:
    - If the Program Version is empty and the Academic Calendar is empty, CampusNexus Student displays the message: *"Could not determine the academic calendar for this student's program. Please select the academic calendar for this program."* CampusNexus Student also updates the Academic Calendar with the value you select, and it uses this value for the academic calendar for this calculation. If no value is selected, the process is terminated. Otherwise, CampusNexus Student uses the Academic Calendar for this calculation.
    - If the Program Version is not empty, CampusNexus Student uses the Program Version Academic Calendar.
    - If the Academic Calendar is 2, 3, 4, 5, or 6, the Period to use for the calculation must be Payment Period. If the Academic Calendar is 1, you select the Period to use for the calculation. CampusNexus Student defaults the answer to the contents of the Program Version Return to Title IV Period.
4. Title IV Payment Period/Period of Enrollment Start and End Dates

    The Return of Title IV Funds calculation will always be calculated for a defined time frame. This defined time frame will be the Title IV payment period or period of enrollment the student was attending when he or she withdrew from school. To determine these dates, CampusNexus Student does the following:

    - If the period to use for the calculation is Title IV Payment Period, CampusNexus Student prompts you to select the term from which the student dropped. If you do not select a term, and the academic calendar is 2, 3, or 4, the program terminates the process.
    - If the academic calendar is 1, CampusNexus Student finds the academic year in which the student dropped by finding the record in the student's academic year table where the Enroll Status Date is within the student's academic year Start Date and End Date. If a record is found, CampusNexus Student defaults the period start and end dates to these dates.
    - If you did select a term, CampusNexus Student defaults the period start and end dates to the selected term

start and end dates.

- If neither a term was selected nor a record was found in the student's academic year table, CampusNexus Student defaults the period start date to the student's start date (if their re-enrollment date is null) or to their re-enrollment date if not null.
- If the Academic Calendar is 1, you are prompted to edit the start and end dates. Otherwise, the period being used is the Period of Enrollment.
- If the Academic Calendar is 5 or 6 and the configuration on the student's program version allows for payment periods, the calculation will be performed over the payment period and use the payment period dates persisted within the system.

When the Period to use for the calculation is not Title IV Payment Period:

- If the billing method for the student is Full program (Billing Method Frequency = 'P'), CampusNexus Student defaults the Period start and end dates to the student's start date/re-enrollment date and the expected graduation date.
- If the billing method for the student is Academic Year (Billing Method Frequency = A), CampusNexus Student finds the record in the student's Academic Year table where the Last Date of Attendance (LDA) is within the student's academic year Start Date and End Date. If a record is found, the program defaults the period start and end dates to the student's academic year Start Date and End Date. Otherwise, the program defaults the period start and end dates to blank.

CampusNexus Student prompts you to edit/confirm the period start and end dates. The Payment Period/Period of Enrollment start and end dates are validated as follows:

- The period end date must be greater than the period begin date.
- The period begin date must be greater than or equal to the student's start date.
- The period end date must be less than or equal to the student's expected graduation date.

SEOG Matching Percentage

If you have a fund source that is SEOG, select the SEOG Grant? option in the Fund Source Code Setup form, and enter the SEOG matching funds percentage in the Match % field. This information is important when calculating a Return of Title IV funds. The amount of SEOG funds received and expected is *reduced* by the school's matching percentage.

Return of Title IV Funds Calculation Worksheets

The business rules for calculating the Return of Title IV Funds is outlined on the worksheets provided by the Department of Education (ED). There are two worksheets: one for credit hour programs and one for clock hour programs. Most of the steps outlined in the two worksheets are the same. To determine if a program is credit hour or clock hour, CampusNexus Student checks the value of the academic calendar for the program version. If the Academic Calendar is 5, the program is a clock hour program. Otherwise, it is a credit hour program.

Note: CampusNexus Student displays items in boxes A thru K for calculations with a withdrawal date before 7/1/06 using the appropriate calculation method, and Steps 8 through 10 will not appear. Boxes A thru U will appear for calculations after 7/1/06, and Steps 8 through 10 will appear. .

The wizard accommodate these changes:

- Inclusion of the three grant programs: Academic Competitiveness Grant (ACG), National SMART Grant, and the TEACH Grant.
- Deletion of the LEAP, SLEAP, and GEAR UP programs
- The clock-hour program calculation for scheduled hours in Step 2
- The 50% of total grants reduction from the student's repayment responsibility in Step 9
- The order for the amounts of Title IV Funds to be Returned in Steps 6 and 10
- The $50 minimum repayment amounts for grants that student's have the responsibility to repay in Step 10

The IASG grant is included on the Return to Title IV worksheets.

- The addition of IASG occurs in Steps 1, 6, and 10.
- CampusNexus Student validates the withdrawal date for the student to display the proper Title IV worksheets.
- For students having withdrawal dates **on or after July 1, 2010**, the Return to Title IV worksheets that identify IASG for inclusion are used and CampusNexus Student performs the Return to Title IV calculations that identify IASG awards for inclusion.
- For students having withdrawal dates **prior to July 1, 2010 or not having withdrawal dates**, the existing Return to Title IV worksheets are used and CampusNexus Student performs the existing Return to Title IV calculation.
- By including IASG fund sources, the calculation of Title IV Grant Programs Amount Disbursed and the Title IV Grant Programs Amount Could Have Been Disbursed sections are also affected.

Previously Calculated Title IV Refunds

When you click **Calculate** on the Refund Calculation form, CampusNexus Student determines whether there are previous Title IV calculations. If there is a previous Title IV calculation, the following message is displayed: *"Previous Title IV Calculation found. Do you want to view the result of the previous calculation?"*

- When you click **No**, the **Delete Previous Calculation Results** option is enabled upon entering the Return of Title IV Funds Calculation wizard.
- When click **Yes**, the **Review Previous Calculation Results** option is enabled, upon entering the Return of Title IV Funds Calculation wizard.

These options are available only if the refunds have not been posted yet:

- When you select Review Previous Calculation Results the previous calculation is displayed in a read-only mode.
- When you select Delete Previous Calculation and Recalculate, the previous calculation is deleted and the recalculation will be as if it were new.

You can change the *review* or *delete* option before clicking Next.

Refund of Title IV Calculation Wizard

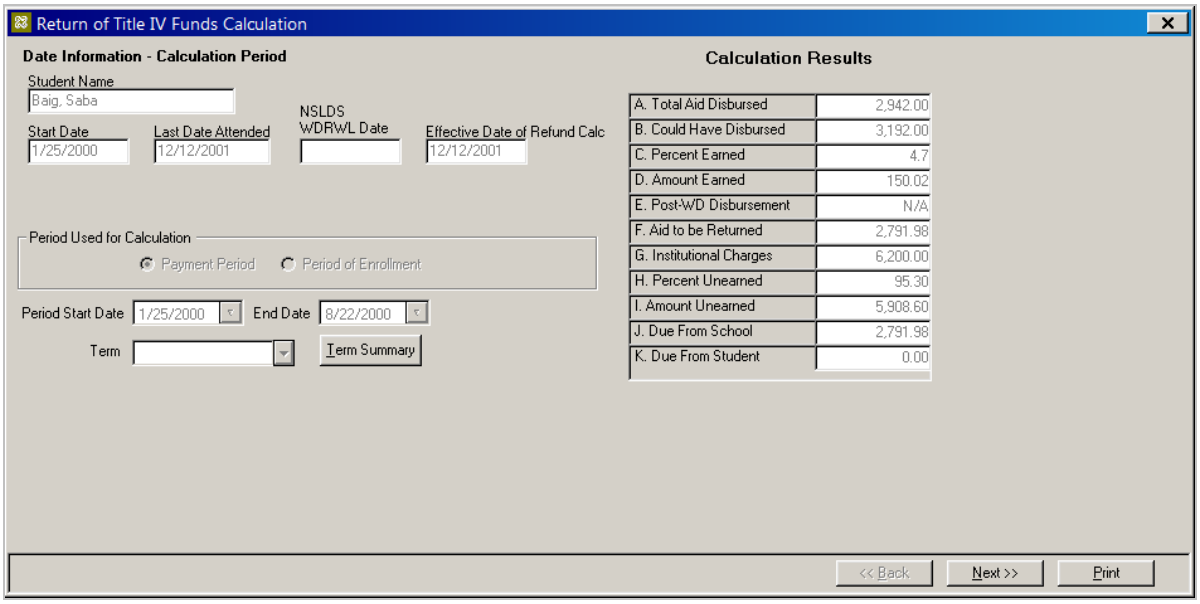
The Refund of Title IV Funds Calculation wizard is invoked from the Refund Calculation form.

Note: You can navigate to other areas of CampusNexus Student to verify student information, while using the Return of Title IV Funds Calculation wizard.

The following rules apply when you leave the refund calculation form and return:

- You can navigate to other areas within the application from any step within the Return of Title IV Funds Calculation wizard.
- Navigating to other forms within the application while the Return of Title IV Funds Calculation wizard is active will not affect any date previously entered within the wizard.
- If changes are made within that will affect the Return to Title IV Funds Calculation data, those changes will be reflected within the Return to Title IV Funds Calculation wizard when focus is returned back to the form. Any data or selections that had been entered manually up to that point will be retained if still applicable.

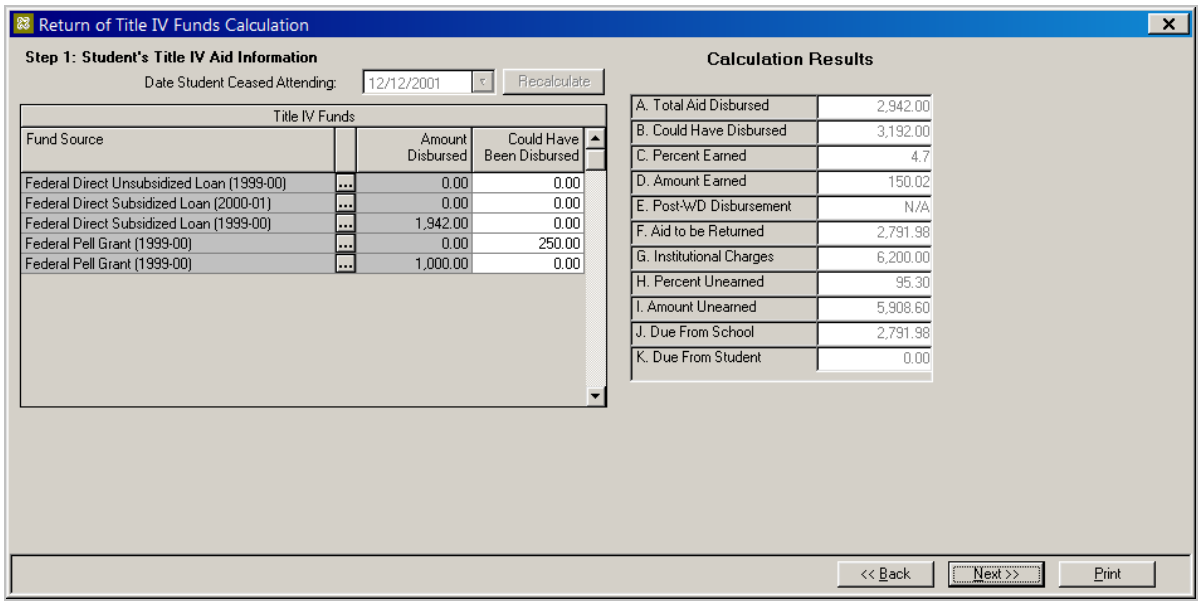
Menu options such as Lists, View, Daily, etc., are enabled so that you can navigate to other areas of CampusNexus Student while leaving the Refund Calculation form open.



Note regarding the **Academic Year/Payment Period** and **Term** fields: If the student is enrolled in a program version with academic calendar 5 or 6 and billed by payment period, the combo box for **Term** is replaced by the **Payment Period** combo box. When a payment period is selected, the start and end dates are used as the start and end of the R2T4 calculation period.

Worksheet Step 1: Student Title IV Aid Information

CampusNexus Student calculates the amount of Title IV aid disbursed (*Worksheet Box A*) and the amount that could have been disbursed (*Worksheet Box B*) within the payment period or period of enrollment (time frame) for this calculation. The logic for this step is the same on the credit and clock hour worksheets.



The Date Student Ceased Attending field is used to determine whether a posted disbursement is considered ‘Amount Disbursed’ or ‘Could Have Been Disbursed’. An inadvertent overpayment occurs when an institution receives a Title IV overpayment of aid that is posted to the student’s ledger after the student has ceased to attend, but before the Date of Determination (DOD). This overpayment is included in R2T4 calculations as 'Could Have Been Disbursed’, rather than ‘Amount 'Disbursed.’ The ‘Could Have Been Disbursed’ funds include inadvertent overpayments and disbursements that are still scheduled for the period that is being calculated.

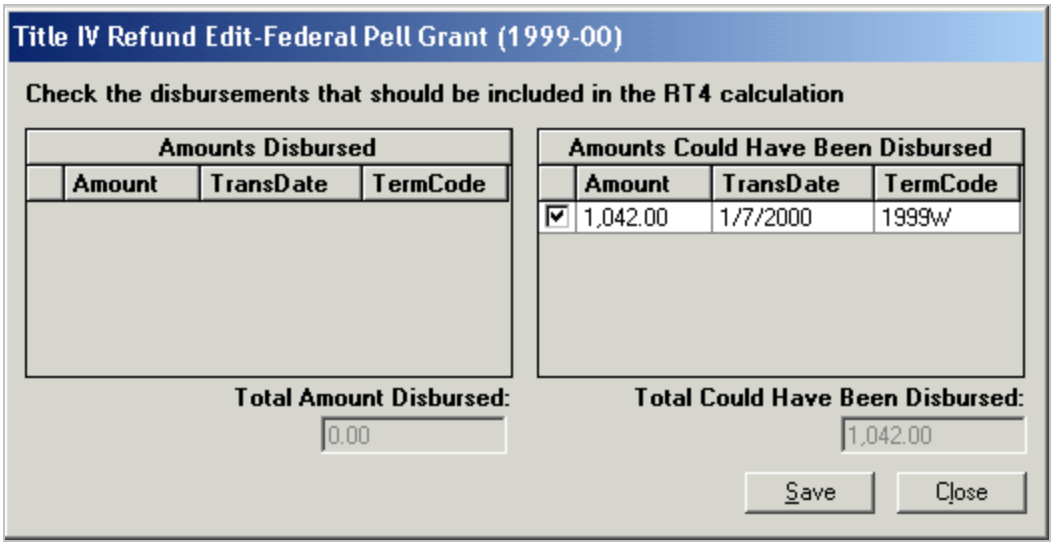
- If attendance is required for the institution, the student's LDA is used to determine if the disbursement posted is an inadvertent overpayment (posted after LDA). This means the Date Student Ceased Attending field will be automatically populated with the LDA and it cannot be edited.
- If attendance is not required, this field is populated with the NSLDS Withdrawal date by default for an Actual calculation. For a Hypothetical calculation, this field is populated by the LDA by default. This date can be edited as needed. After selecting an appropriate date,you can click on the Recalculate button to reevaluate the disbursements (based on the selected Date Student Ceased Attending) to determine if the disbursements are considered 'Amount Disbursed' or 'Could Have Been Disbursed.'

  The Date Student Ceased to Attend field is populated with a saved value (for R2T4 calculations that have been completed previously) by default. Click ... to select the disbursements that should be included in the RT4 calculation.

Note: Under certain conditions a program may have two defined payment periods - one for Title IV grants and Perkins Loan funds and one for Direct Loan funds. Because only one payment period may be used within the Return of Title IV calculation to determine aid received or aid that could have been received, the regulations specify that institutions must use the payment period that ends later as the basis of the return calculation. Any aid associated with payment periods that overlap the payment period used as the basis of the return calculation must be attributed to that payment period.

An example of how to perform the return calculation and attribution defined above when an institution disburses Title IV aid to a student using different payment periods can be found in Volume 5 of the 2012-2013 Federal Student Aid Handbook (page 5-80). While the example is specific to Non Standard Term programs that are non SE9W and where both Title IV grant and Direct Loans funds have been awarded, the guidance received from Federal Student Aid states that this is standard guidance in all situations where payment periods for loans and grants do not align.

While the Return of Title IV Funds feature in CampusNexus Student provides clients with sufficient flexibility to manually perform the attribution defined above, this is not automated at this time. Once the amounts have been entered on the form, CampusNexus Student applies the appropriate return calculation based on the Return of Title IV Worksheets published by the Department of Education.



CampusNexus Student determines the amount of aid received for each Title IV fund source in the time frame. This is done by selecting all of the student's records in the transaction table that satisfy the following criteria:

- The transaction is a Financial Aid related transaction.
- The fund source is a Title IV fund source.
- The Financial Aid transaction applies to the payment period/period of enrollment (time frame) for which this

calculation is being done.

- If the calculation is based on the Period of Enrollment, the transaction date must be within the defined time frame. Otherwise, the calculation is based on the Payment Period.
- If the term code for the transaction is null, or a term was not specified for this calculation, the date must be within the defined time frame. Otherwise, the term code for the transaction must match the term code specified for this calculation.

For all records that pass the above criteria, CampusNexus Student calculates the net amount received for each type of fund source.

If the fund source is a SEOG grant and a matching percentage has been entered for the SEOG, CampusNexus Student reduces the net amount received as follows:

Net Amount Received = (100 – Matching Percentage) * Net Amount Received)

CampusNexus Student determines the amount of aid that could have been disbursed in the time frame at the time of the student's withdrawal but was not disbursed (*Worksheet Box B*). CampusNexus Student selects all the student's scheduled disbursements that satisfy the following criteria:

- The disbursement is still expected to be received. Scheduled Status must equal *S* or *R*.
- The fund source is a Title IV fund source other than College Work-Study.
- The FA disbursement applies to the payment period/period of enrollment for which this calculation is being done.
- If the calculation is based on the Period of Enrollment, the expected date must be within the defined calculation time frame. Otherwise, the calculation is based on Payment Period.
- If the term code for the disbursement is null or a term was not specified for this calculation, the expected date for disbursement must be within the defined calculation time frame. Otherwise, the term code for this disbursement must match the term code specified for this calculation.

For all records that pass the above criteria, CampusNexus Student totals the expected amount for each different type of fund source.

If the fund source is a SEOG grant and a matching percentage has been entered for the SEOG, CampusNexus Student reduces the expected amount as follows:

Expected Amount = (100 - Matching Percentage) * Expected Amount)

If no Title IV funding was calculated to have been received or could have been received, CampusNexus Student displays the message: *"No Title IV funding found that has been disbursed or that could have been disbursed".* and terminates the calculation. There is no need to proceed further with this calculation.

If Title IV aid is found, the results are displayed. A row is displayed for each fund source where amounts were calculated.

Fund Source Disbursement

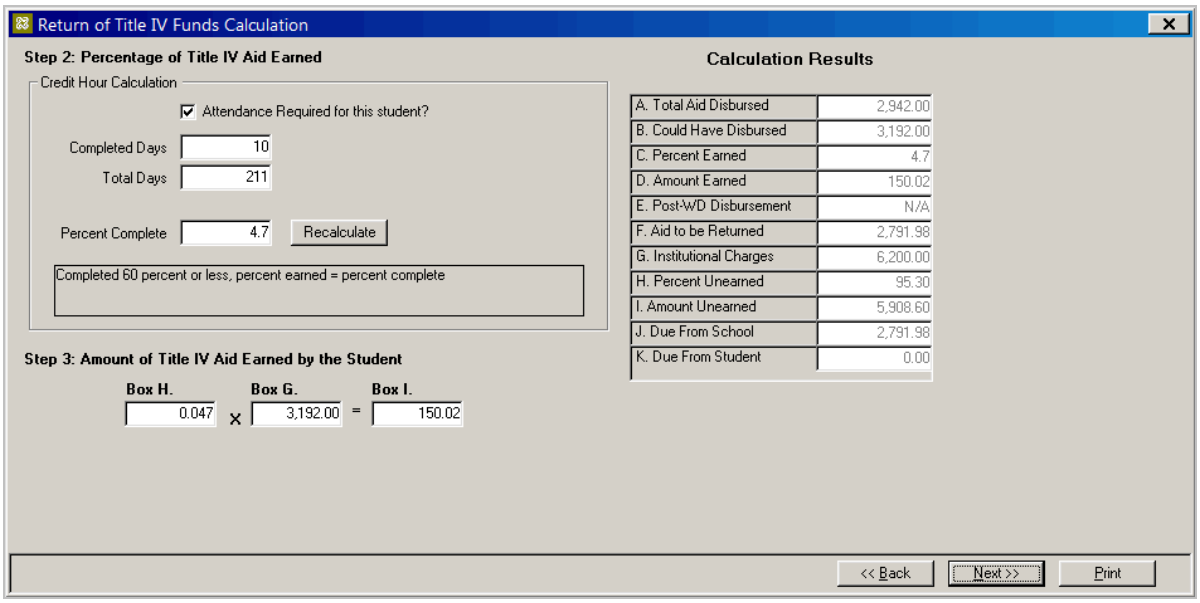
Fund Source	Amt Disbursed	Could Have been Disbursed	Still Expected
XXXXXXXXXXXXXXXXXX	99999.99	99999.99	99999.99
XXXXXXXXXXXXXXXXXX	99999.99	99999.99	99999.99

- Total Title IV aid disbursed for payment period/period of enrollment: 999999.99
- Total Title IV aid disbursed plus Title IV aid that could have been disbursed: 999999.99

CampusNexus Student allows you to navigate the grid and edit any amounts in the amount that **Could Have Been Disbursed** column. The amounts in this column cannot be less than zero and must be less than or equal to the amount still expected. When you exit the grid, you have the option to continue or exit the Calculation.

Worksheet Step 2: Percentage of Title IV Aid Earned

The business rules in this step for the credit hour and clock hour worksheets are different. For a student withdrawing from a clock hour program, only scheduled hours–not completed hours–are used to determine the percentage of the payment period or enrollment period completed (clock hours scheduled to be completed as of the day on which the student withdrew divided by total clock hours in the period). If the percentage is more than 60%, the student earns 100% of his or her aid.



Credit Hour Worksheet

CampusNexus Student determines whether the institution is required to take attendance or not. It searches the attendance table for records related to the student. If a record is found, you are presented with the following message: *"Detailed attendance record(s) were found for this student. Is attendance required to be taken for this student?"* The program defaults the answer to yes.

If no attendance records were found for the student, you will see the following message: "No detailed attendance records found for this student. Is attendance required to be taken for this student?" The program defaults the answer to no.

If attendance is not required, then the percentage earned (*Worksheet Box C*) will be 50%. Otherwise, the percentage of the payment period/period of enrollment will be calculated by applying the following logic:

Note: NSLDS WDRWL date = Withdrawal date as reported to the National Student Loan Data System (NSLDS)

- Total days completed: NSLDS WDRWL date - period begin date.
- Total days in calculation time frame: period end date - period begin date.
- The program subtracts any days of approved LOA that occurred from the period begin date to the NSLDS WDRWL date.
- The program subtracts any holidays where the scheduled time off was 5 days or more. If the holiday period encompasses the period begin date and the NSLDS WDRWL date, the program subtracts the applicable days from the Total days completed.
- The program divides the total days completed by the total days in the calculation period to determine the percentage of the payment period/period of enrollment the student completed (*Worksheet Box C*).

Clock Hour Worksheet

Calculation 1

Clock hours completed will be calculated by selecting all attendance records for the student where the date is within the calculation time frame, and the attendance unit type is "M - Minutes".

The calculation of total hours in the payment period/period of enrollment will depend on the billing method for the student's program and the period type being used for the calculation. After the number is calculated, you will be given the option to verify/override the total hours in the period.

If the billing method is Full Program (Billing Method Frequency is "P"), and if the period type is Period of Enrollment, total hours will equal enrollment hours required. Otherwise, the period type is Payment Period and total hours will equal zero.

If the billing method is Academic Year (Billing Method Frequency is "A"), the program defaults the value to the number of hours defined in the academic year from which the student withdrew. CampusNexus Student finds the record for the student where the last date of attendance (LDA) is within the student's academic year start date and end date. If a record is found, total hours equal the student's academic year credit hours. If a record is not found, total hours equal zero.

If the billing method is Term or Course (Billing Method Frequency is "C" or "T"), the program defaults the value to the calculated sum of the clock hours scheduled for the student in the term from which they withdrew. This is done by summing the scheduled enrollment hours for all records for the student where the term ID equals the term specified for the calculation, and the student's enrollment status is not "D". If no term was specified for the calculation, total hours will equal zero.

CampusNexus Student prompts you to edit/verify the total hours in the payment period/period of enrollment. The caption is displayed as follows: If period type is Period of Enrollment, "Enter the total hours in the Period of Enrollment". Otherwise, "Enter the total hours in the Payment Period."

Calculation 2

The logic of determining the clock hours completed is explained in Calculation 1.

Clock hours scheduled are calculated by selecting all attendance records for the student where the attendance date is within the calculation time frame, and the attendance unit type equals "M - minutes". CampusNexus Student determines the sum of minutes attended and minutes absent, then divides by 60 to calculate the clock hours scheduled.

If the result of Calculation 2 is less than 70%, the percentage in *Worksheet Box C* is taken from Calculation 1. If the result of Calculation 2 is equal to or greater than 70%, CampusNexus Student determines the clock hours scheduled to be completed as of the date the student withdrew divided by the total clock hours in the payment period or period of enrollment. (This amount may be greater than 60%.)

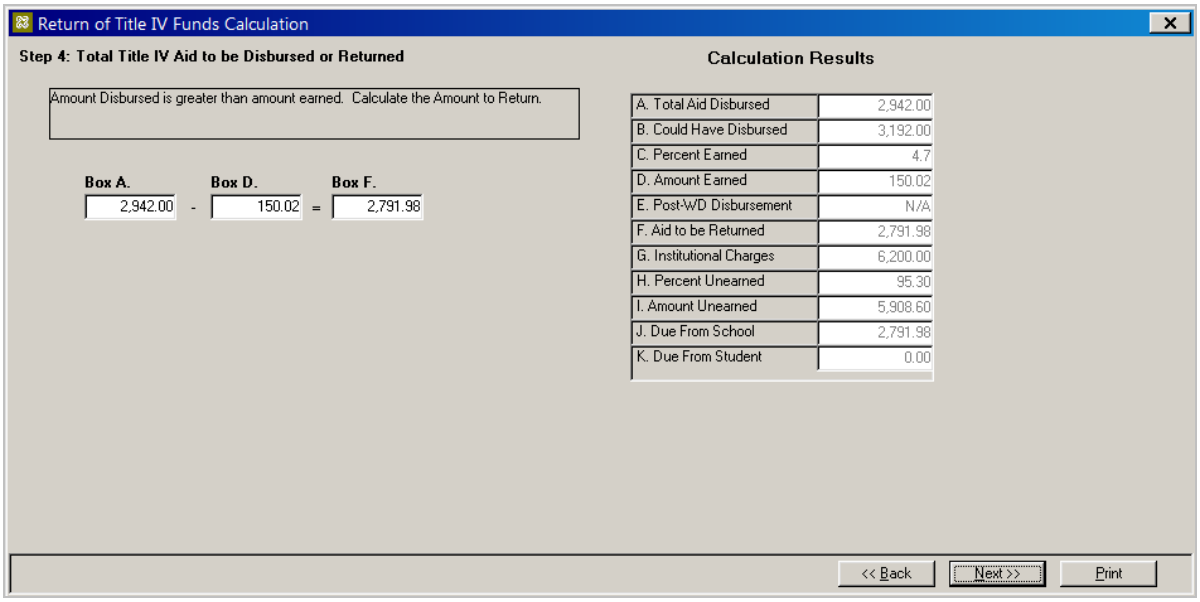
Worksheet Step 3: Amount of Title IV Aid Earned by the Student

This calculation includes the values calculated in *Steps 1* and *2*. The percentage calculated in *Worksheet Step 2* for *Box C* is multiplied by the value calculated in *Worksheet Step 1* for *Box B* to get the amount of Title IV Aid earned by the student (*Worksheet Box D*).

Worksheet Step 4: Total Title IV Aid to be Disbursed or Returned

Please refer to the worksheet titled Post-Withdrawal Disbursement Tracking Sheet along with the main worksheet, located at https://ifap.ed.gov/ifap/. The PWD Tracking Sheet is used in conjunction with *Box E* on the main worksheet.

Notice that under the Calculation Results the inadvertent overpayment to be returned is identified. An inadvertent overpayment occurs when an institution makes a Title IV overpayment of aid to the student's ledger after the student's Last Date Attended (LDA), but before the Date of Determination (DOD). This overpayment is included in Return calculations as 'Amount Could Have Been Disbursed', rather than 'Amount Disbursed.'



Post-withdrawal disbursement (PWD) (*Worksheet Box E*)

A post-withdrawal disbursement is the result if the amount of Title IV aid earned by the student (*Worksheet Step 3*) is greater than the amount of Title IV aid disbursed (*Box A in Worksheet Step 1*). The post-withdrawal disbursement is used as a credit against all outstanding charges on the student's ledger card. If the amount of the post-withdrawal disbursement exceeds the amount of outstanding charges on the student's ledger card, the remaining amount is offered to the student/parent.

The entry of the post-withdrawal disbursement information takes place after the refund calculation is fully completed. A button on the Refund Calculation form is available to edit the post-withdrawal disbursement tracking information. The only information to be entered from this calculation in regard to a post-withdrawal disbursement specifies the fund source(s) and amounts from which the post-withdrawal disbursement will be made.

Post-Withdrawal Disbursement Made From

(See the Post-Withdrawal Disbursement Tracking Sheet.)

CampusNexus Student prompts you to select the fund source(s) and amount(s) from which the PWD will be made. The validation is as follows:

- The total amount entered for all fund sources must equal the total amount of the PWD (Post-Withdrawal Disbursement Tracking Sheet, *Box A*).
- The amount entered for a specific fund source must not exceed the net amount that could have been disbursed for that fund source. (See *Step 1* on the Credit Hour and Clock Hour worksheets.)

Title IV Aid to be Returned (*Worksheet Box F*)

Title IV aid must be returned if the amount of Title IV aid earned by the student (*Step 3*) is less than the amount of Title IV aid disbursed (*Worksheet Box A in Step 1*). If this is the case, proceed to *Step 5*.

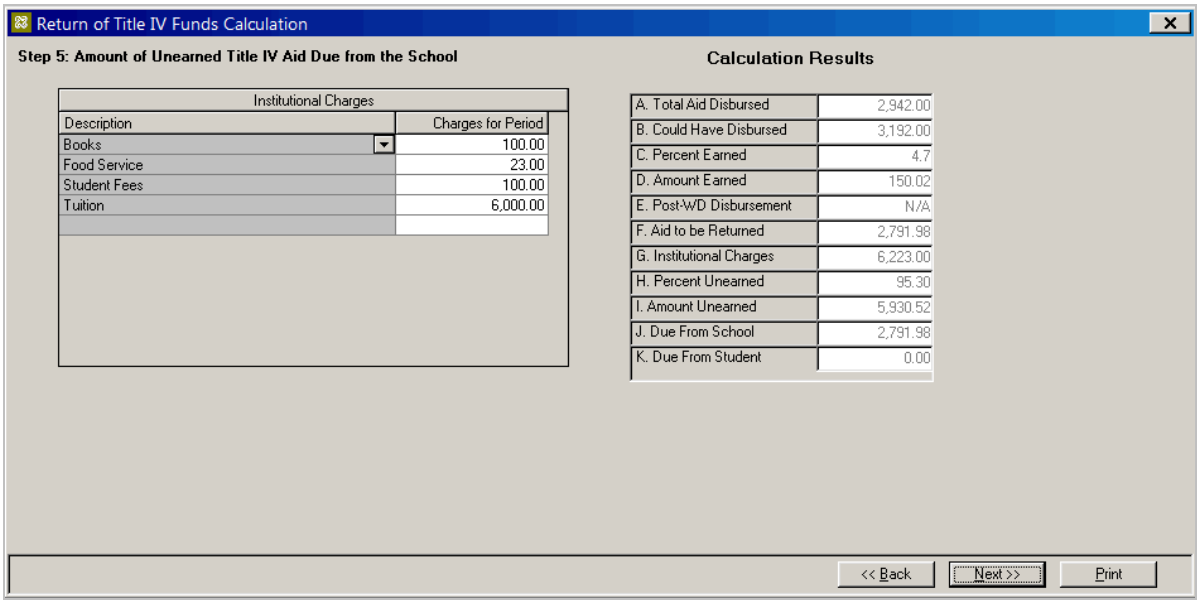
Worksheet Step 5: Amount of Unearned Title IV aid due from the school

The institutional charges for the payment period/period of enrollment are displayed. This is done by selecting all records from the transaction table that satisfy the following criteria:

- The transaction is a charge or adjustment. The transaction type must be *I*, *C* or *D*.
- The transaction applies to the payment period/period of enrollment for which this calculation is being done. If the

period type is Period of Enrollment, the transaction date must be within the defined calculation time frame. Otherwise, the period type is Payment Period. If the term code for the transaction is null or a term code was not specified for the calculation, the transaction date must be within the defined calculation time frame. Otherwise, the term code for the transaction must match the term code specified for the calculation.

- CampusNexus Student uses estimated charges when a calculation is done over the payment period since the charges billed for the time frame can exceed the expected amount due to system anomalies. (Example: A student registers into five 4-credit courses to complete an 18-credit payment period. CampusNexus Student will bill 20 credits for that payment period even though the time frame requires 18.) Charges are estimated based on the budget setting for the student's Academic Year where the drop occurred when the student's program version is academic calendar 5 or 6. The configuration setting for 'r;Institutional Charges Calculation Method' on the budget selected (Lists > Financial Aid > Budget) should be set to 'r;Use Amounts Entered Here' or 'r;Calculate from Total Program Costs' (Lists > Financial Aid > Programs > Program Version > Program Costs tab). Those amounts are used to determine the amounts that should be billed for the payment period. Only Tuition and Books amounts are used, but users are able to manually adjust those amounts or add new transaction codes to include in the Title IV calculations.



CampusNexus Student sums the net amount charged by billing code and displays the results.

Net Amount Charges by Billing Code

Description	Charges for Payment Period/Period of Enrollment
XXXXXXXXXXX	999999.99
XXXXXXXXXXX	999999.99
Total Institutional Charges	999999.99

You can edit the information on this screen if the academic calendar of the student's program is 1, 5, or 6. If you can edit this information, you can add an additional institutional charge or edit the amount of an existing institutional charge. If you add an additional institutional charge, you must select a valid billing code.

If the academic calendar is 2, 3, or 4, you cannot edit any of the institutional charge information. This is because the payment period correspond to a term code in CampusNexus Student and all institutional charges for this payment period are coded with the corresponding term code on the student's ledger card. If the academic calendar is 1, 5, or 6, you can edit the charges

because the institutional charges for the calculation period may not necessarily correlate to what has been posted to the student's ledger card.

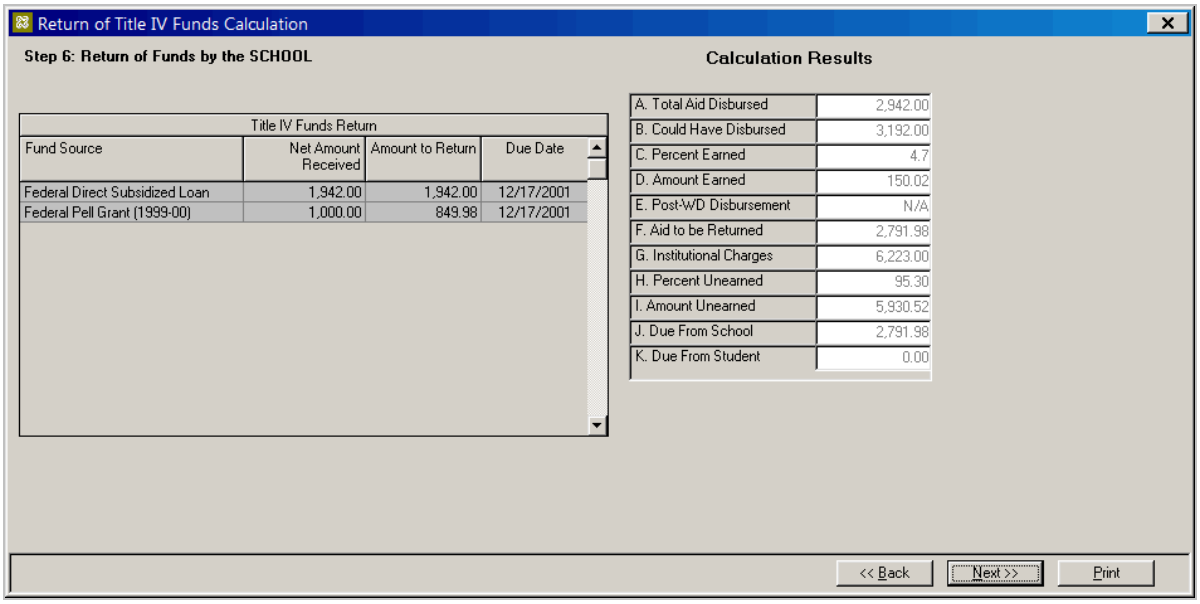
After exiting this screen, you can continue with the calculation or to exit the calculation.

Note: *Worksheet boxes H, I, and J* are explained on the work sheets. You do not edit these values.

Worksheet Step 6: Return of Funds by the SCHOOL

The total amount of funds to be returned is applied to the appropriate fund sources. The amount to be returned to each fund source cannot exceed the net amount received from the fund source. If the amount of funds to return exceeds the net amount received from the first fund source, CampusNexus Student returns the net amount received from the first fund source, and then moves to the next fund source.

Example: *BOX J* in Worksheet Step 5 is $3000.00. The student received a net of $2000.00 from a Subsidized Stafford loan and $4000.00 from a Perkins loan. The funds to return would be as follows: $2000.00 to the Subsidized Stafford loan and $1000.00 to the Perkins loan.



CampusNexus Student displays the amounts to return. Each amount that will be returned will have a due date calculated. Per the regulations of the Return of Title IV Funds policy, the due date for each refund will be 30 days from the student's drop date. This information is displayed as follows:

Amounts to be Returned

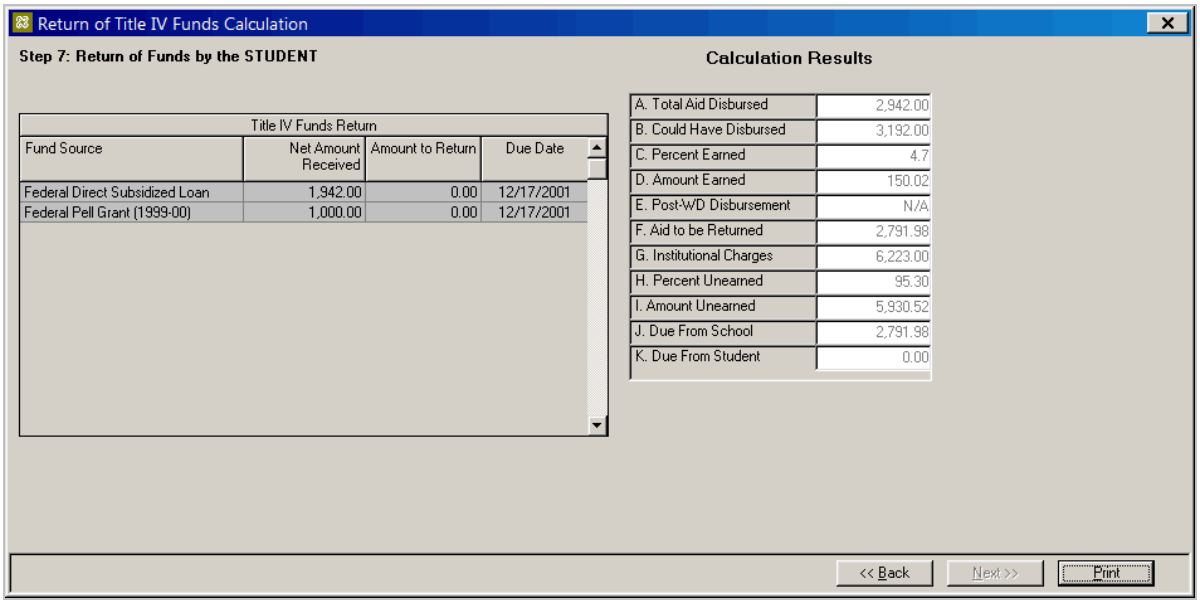
Fund Source	Net Amount Received	Amount to be Returned	Due Date
XXXXXXXXXX	999999,99	999999,99	99/99/99
XXXXXXXXXX	999999,99	999999,99	99/99/99
Amount to be returned		999999,99	

This is a read-only form. You can continue with the calculation or to exit the calculation.

Note: The **Due Date** is based on the Determination Date and the **Number of days to add to Determination Date to calc "Due Date"** field setting on the campus Refunds form.

Worksheet Step 7: Initial Amount of Unearned Title IV Aid Due from the STUDENT

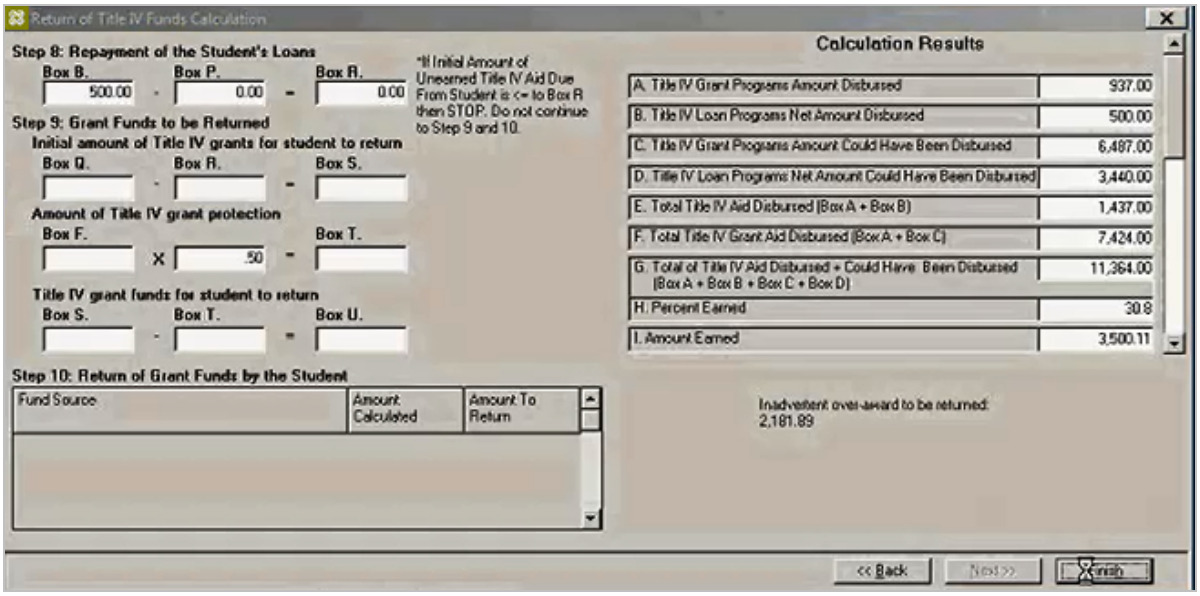
If this calculation returns a number greater than zero, CampusNexus Student proceeds to *Worksheet Step 8*. If this calculation returns zero, the calculation is completed.



Worksheet Step 8: Return of Funds by the STUDENT

CampusNexus Student applies the same validation logic here as was done in *Worksheet Step 6*. The amount to return to each fund source cannot exceed the net amount received from the fund source. HERA regulations that went into effect in 2006 states: *A student shall only be required to return grant assistance in the amount by which the amount to be returned by the student exceeds 50 percent of the total grant assistance received by the student for the payment period or period of enrollment.* The 50% rule only applies to Pell and SEOG loans.

Notice that this step also displays the correct inadvertent overpayment amount. This amount also appears on the R2T4 report.



When you click **Finish**, the following message is displayed: *"Return of Title IV Fund Calculation Saved. Click Ok to View Report"*. Click **OK** to proceed to the Return of Title IV report.

The 50% Rule

The Return to Title IV calculation reflect s the 50% rule. An example is provided below of how to determine 50% of the Title IV grant.

If the current return calculation determined that a student owed $1200 back to the Pell program after $1500 had been received for the payment period, the current amount to return would be $600. Under the new rule only the grant money to be returned greater than $750 (1/2 of $1500) must be returned. Under the new rule $450 would need to be returned. $1200 - 750 = $450.

Note: The net amount received from each fund source includes the amounts being returned in *Worksheet Step 6*. For example, if $2000.00 was received from a Subsidized Stafford loan and posted to the student's ledger card, but $2000.00 was calculated as needing to be returned in Worksheet Step 6, the net amount received would be zero.

CampusNexus Student displays the amounts to return using the same layout as in *Worksheet Step 6*.

Print the Calculation

The printed report does not match the layout of the attached worksheets exactly; however, the presentation of the information flows according to the worksheets.

Save the Calculation

If a hypothetical calculation is being done, no information is saved. If an actual calculation is being done, you can save or cancel the calculation.

The following files hold the information for this calculation:

- Return of Title IV table
- Return of Title IV Aid table
- Return of Title IV Institutional Charge table

A record exist in the Return of Title IV table for each unique combination of enrollment ID and drop date. Even though more than one refund policy may be run for a student when he or she drops, only one return of funds calculation will exist.

When saving the calculation, CampusNexus Student checks if a record already exists in the Return of Title IV table for the student where the drop date equals the enrollment status date. If a record is found, CampusNexus Student the existing record with the values from the calculation. If a record does not exist, CampusNexus Student adds a record and then updates it.

The Return of Title IV Aid table holds one record for each Title IV fund source from which the student received a disbursement or could have received a disbursement. Before adding the records to this table, CampusNexus Student deletes all existing records where the calculated Return of Title IV ID equals the ID in the Return of Title IV table. This will delete all prior records if the calculation is being done again, and you opted to overwrite prior calculation information.

The Return of Title IV Institutional Charge table holds one record for each institutional charge the student received. Before adding the records to this table, CampusNexus Student deletes all existing records where the calculated Return of Title IV ID equals the ID in the Return of Title IV table. This will delete all prior records if the calculation is being done again, and you opted to overwrite prior calculation information.

All amounts to be returned that are calculated in *Worksheet Step 6* are updated to the Refunds Due table. If this calculation has already been done for the student, any re-funds for Title IV monies that were saved from the prior calculation and have not yet been refunded will be deleted. Records for the student with the following criteria will be deleted:

FaRefund.SaReturnOfT4ID = SaReturnOfT4.SaReturnOfT4ID AND FaRefund.Status = 'N'

After saving the calculation information, you can continue with the standard refund calculation or to exit the calculation.

Standard Refund Calculation

The standard refund calculation logic has been modified to recognize any pertinent data created in the Return of Title IV Funds calculation that has already been run. If an institution is not using the Return of Title IV Funds calculation, the standard refund calculation will function as it always has. If an institution is using the Return of Title IV Funds calculation, data will exist that will be "dropped" into the standard calculation.

Selection of Term or Academic Year

If the Return of Title IV Funds calculation has been done, you will have already specified the term or academic year from which the student dropped. You will not be prompted to enter this information again.

Refund Payable Breakdown

The most significant change in the standard refund calculation is in the section where the refund payable breakdown is computed. If the Return of Title IV Funds calculation has been done, the refund payable breakdown for all Title IV funding has already been done. This section of the refund calculation has been modified to calculate any remaining re-fund payable for non-Title IV funding (if applicable). If the Return of Title IV Funds calculation has not been done, this section will execute with no changes.

The "bottom line" of each refund calculation has been adjusted by the results of the Return of Title IV Funds calculation. For example, if the Return of Title IV Funds calculation returned an amount of $2000.00 to be returned, and the standard refund calculation determined that $3000 needs to be returned, the net effect would be that $1000.00 still needs to be sent back to non-Title IV fund sources. The logic that already exists in the standard refund calculation would be executed with the exception that only non-Title IV fund sources would be evaluated. Another example might be if the standard refund calculation determined that $1000 needs to be returned but the Return of Title IV Funds calculation calculated that a post-withdrawal disbursement of $1500 will be received, the net effect would result in $2500 to be returned to non-Title IV fund sources.

The output for the standard refund calculation has been modified to reflect the impact of the Return of Title IV Funds calculation. If a post-withdrawal disbursement (PWD) was calculated, a line is added to the output stating the amount of the post-withdrawal disbursement. If Title IV aid is being returned, a line is added to the output stating the amount of Title IV aid to be returned.

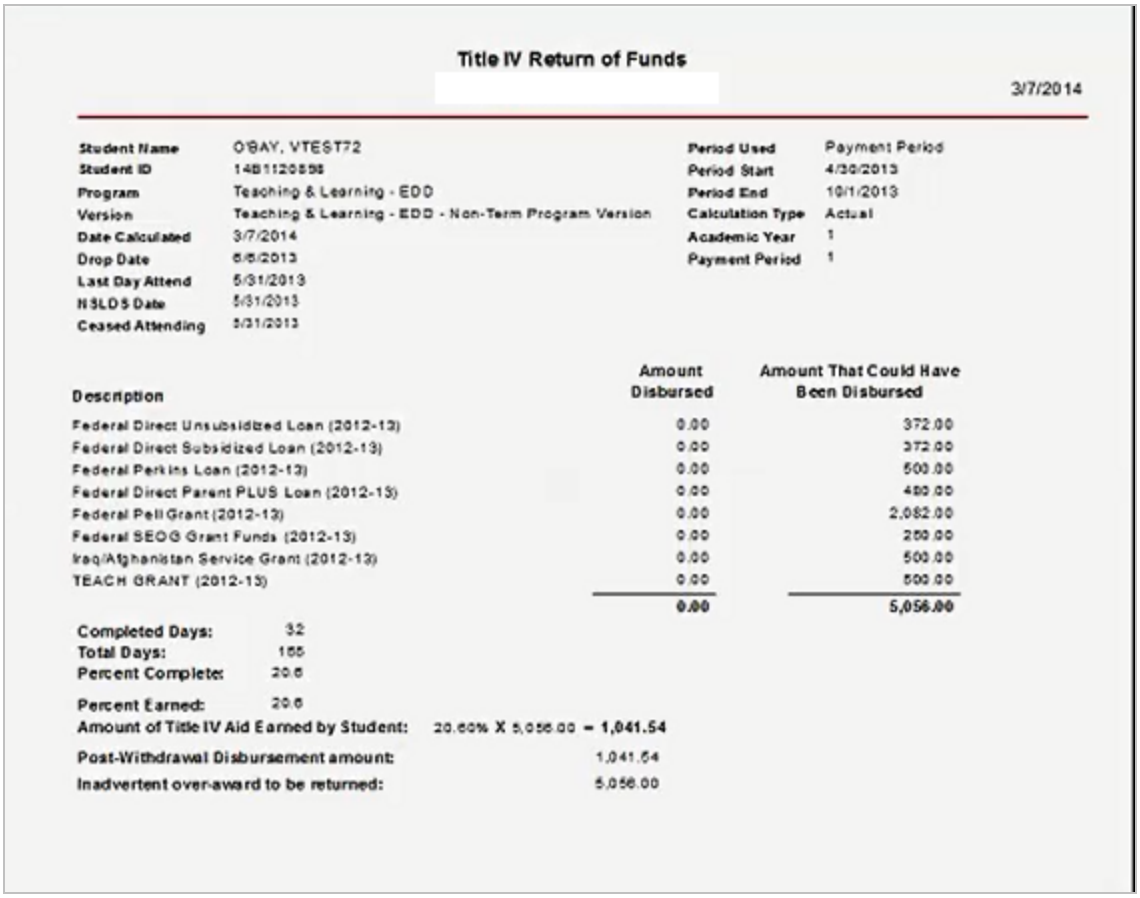
IMPORTANT! The amount of Title IV aid to be returned in this section will be the amount to be returned by the school. Any Title IV monies due to be returned by the student will not be included in the calculations in this section.

Update Return of Title IV Funds Calculation ID

If the Return of Title IV Funds calculation is done before entering the standard refund calculation, CampusNexus Student updates the Refund Calculation Return of Title IV ID with the Return of Title IV ID.

Title IV Return of Funds Report

As part of the refund calculation procedure, CampusNexus Student prepares a report. The Title IV Return of Funds report provides details of a Title IV refund calculation. There are no selection or sort criteria that you can manipulate for this report. The details on the report include student name, SSN, program, program version, date calculated, start date, drop date, last day attended, NSLDS date, ceased attending date, period used, period start date, and period end date. For each fund source, the report displays the fund source description, amount disbursed, and amount that could have been disbursed. It also shows completed days, total days, percent complete, percent earned, amount of Title IV aid earned by the student, Title IV aid to be returned, total institutional charges, percentage of Title IV aid unearned, amount of Title IV aid due from school, the amount of Title IV aid due from student, the initial Title IV grants amount due from student, and the protected amount. It also shows the breakdown of return of funds by the school, including the source of aid and amount.



Title IV Return of Funds

3/7/2014

Student Name	O'BAY, VTEST72	**Period Used**	Payment Period
Student ID	1451120595	**Period Start**	4/30/2013
Program	Teaching & Learning - EDD	**Period End**	10/1/2013
Version	Teaching & Learning - EDD - Non-Term Program Version	**Calculation Type**	Actual
Date Calculated	3/7/2014	**Academic Year**	1
Drop Date	6/6/2013	**Payment Period**	1
Last Day Attend	5/31/2013		
NSLDS Date	5/31/2013		
Ceased Attending	5/31/2013		

Description	Amount Disbursed	Amount That Could Have Been Disbursed
Federal Direct Unsubsidized Loan (2012-13)	0.00	372.00
Federal Direct Subsidized Loan (2012-13)	0.00	372.00
Federal Perkins Loan (2012-13)	0.00	500.00
Federal Direct Parent PLUS Loan (2012-13)	0.00	480.00
Federal Pell Grant (2012-13)	0.00	2,082.00
Federal SEOG Grant Funds (2012-13)	0.00	250.00
Iraq/Afghanistan Service Grant (2012-13)	0.00	500.00
TEACH GRANT (2012-13)	0.00	500.00
	0.00	**5,056.00**

Completed Days:	32
Total Days:	155
Percent Complete:	20.6
Percent Earned:	20.6

Amount of Title IV Aid Earned by Student: 20.60% X 5,056.00 = **1,041.54**

Post-Withdrawal Disbursement amount: 1,041.54

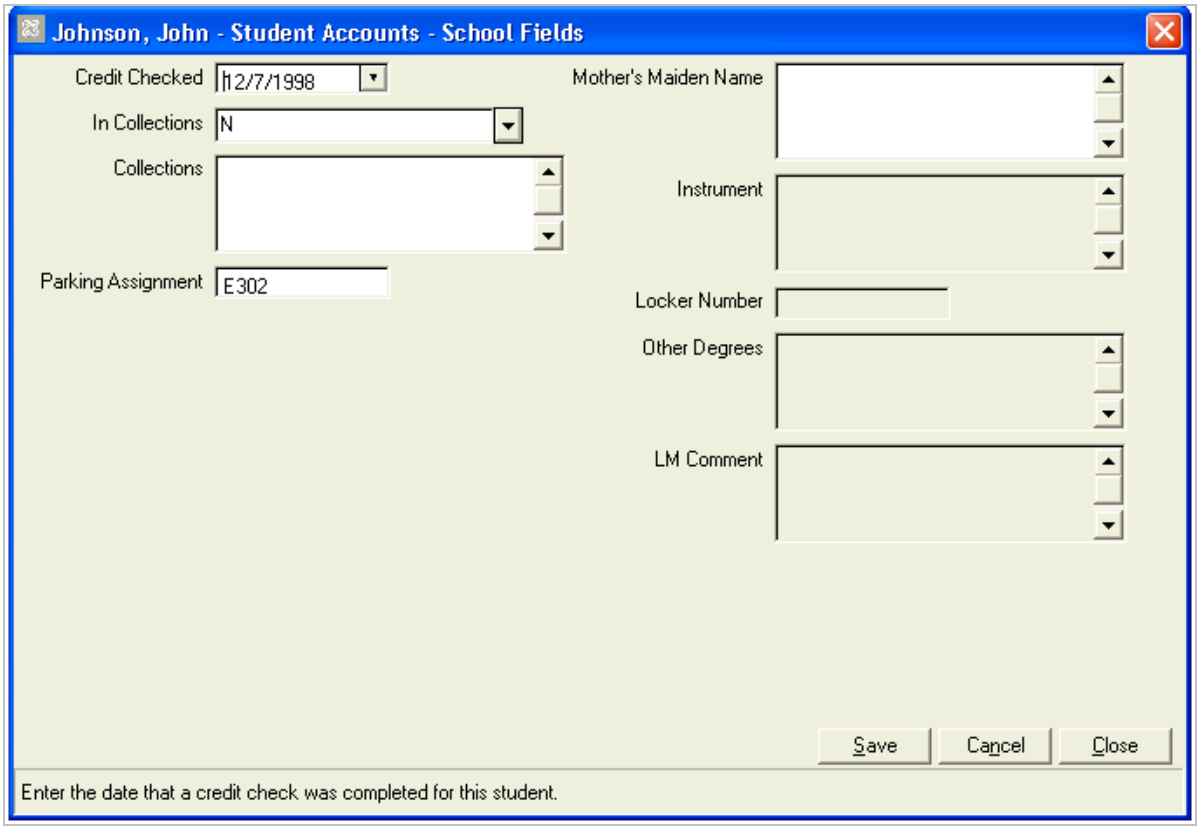
Inadvertent over-award to be returned: 5,056.00

School Fields - Student Accounts

School-defined fields are set up by your system administrator to collect information that is not required by the generic CampusNexus Student application. (See Setup > School Defined Fields.) The fields are organized by department during setup. At least one department has the authority to change each field. Some fields may be viewed but not edited in your department. A field may be flagged as confidential by the originator, i.e., not viewable outside of the department that is using it. For instance, if a field can only be viewed or edited by the Student Accounts Department, it will only be visible when the form is opened from View > Student Accounts > School Fields.

To view or edit school fields:

1. Navigate to **View** > **Student Accounts** > **School Fields**. The School Fields form is displayed.



2. Click on or tab to a field that you want to change. Select an option or enter data to edit the field.

   The fields are displayed in edit mode (white background) if your department has been given permission to change the data. Fields that are "dimmed" cannot be changed. Fields that are listed but are gray and show no data are simply not filled in yet by the staff member responsible for doing so.

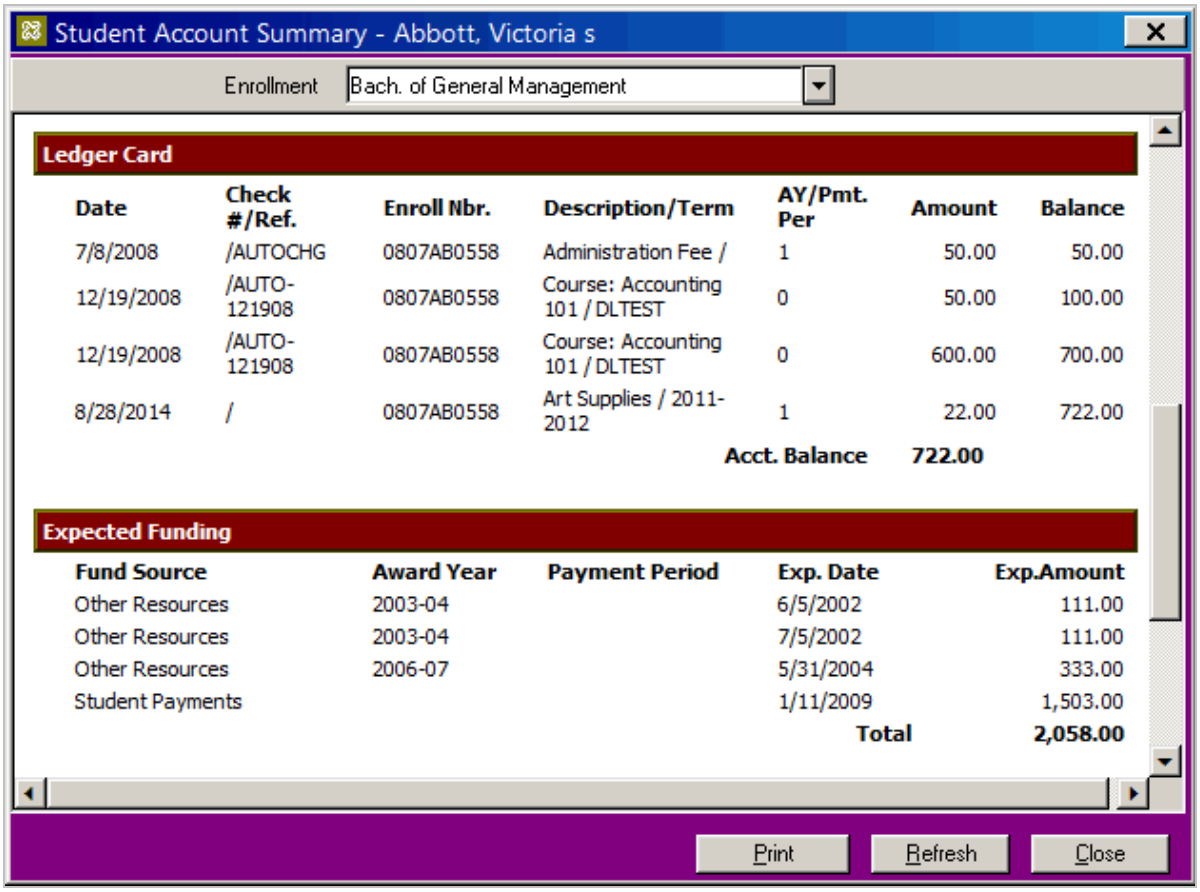
3. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Student Account Summary

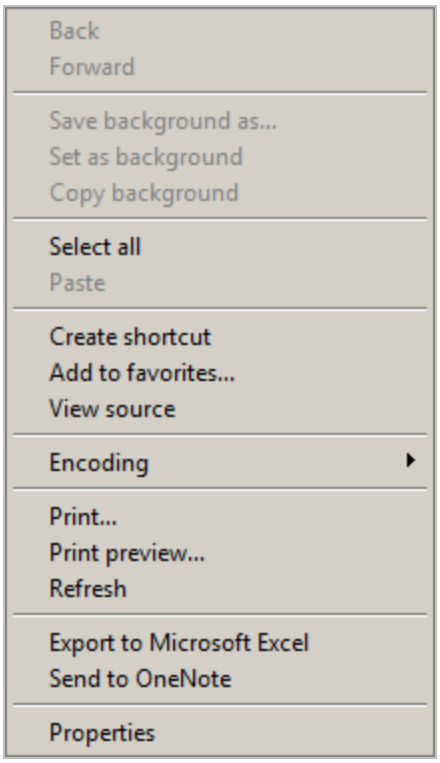
The Student Account Summary report provides an analysis of the student's financial position with your institution. It includes basic identification information, followed by sections for the Ledger Card, Expected Funding, and a Category Breakdown of applied payments. right-click the report to see a short cut menu with HTML-style options.

To view the Student Account Summary report:

1. Select a student.
2. Navigate to **View > Student Accounts > Summary**. The Student Account Summary for the selected student is displayed.



3. If the student has more than one enrollment, select an **Enrollment**and click **Refresh**.
4. Click the section headings to view associated forms, such as the Ledger Card.
5. Right-click the report to access a shortcut menu with the following options:



6. Click **Print** to print the report.
7. Click **Close** to close the form.

Payment Information

Use the Payment Information form to enter and store information on student bank accounts and credit cards. Accounts shown in the Payment Information form can be debited for school fees or credited for refunds and/or stipends to the students, with the student's or agency's permission. You can set up a student payment account or agency payment account.

Integration with CampusNexus Finance, HR & Payroll

When CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll, the bank account information is synchronized between the two systems. The account number is encrypted. Permissions are assigned to view the account number.

- If student bank account information is created in the Payment Information form, the data is transmitted to the Student Bank Accounts module in CampusNexus Finance, HR & Payroll. The first 10 characters of the 'Bank Name' in CampusNexus Student are saved as 'Bank Account' in CampusNexus Finance, HR & Payroll. If the Bank Account already exists in CampusNexus Finance, HR & Payroll, a message is displayed in CampusNexus Student.

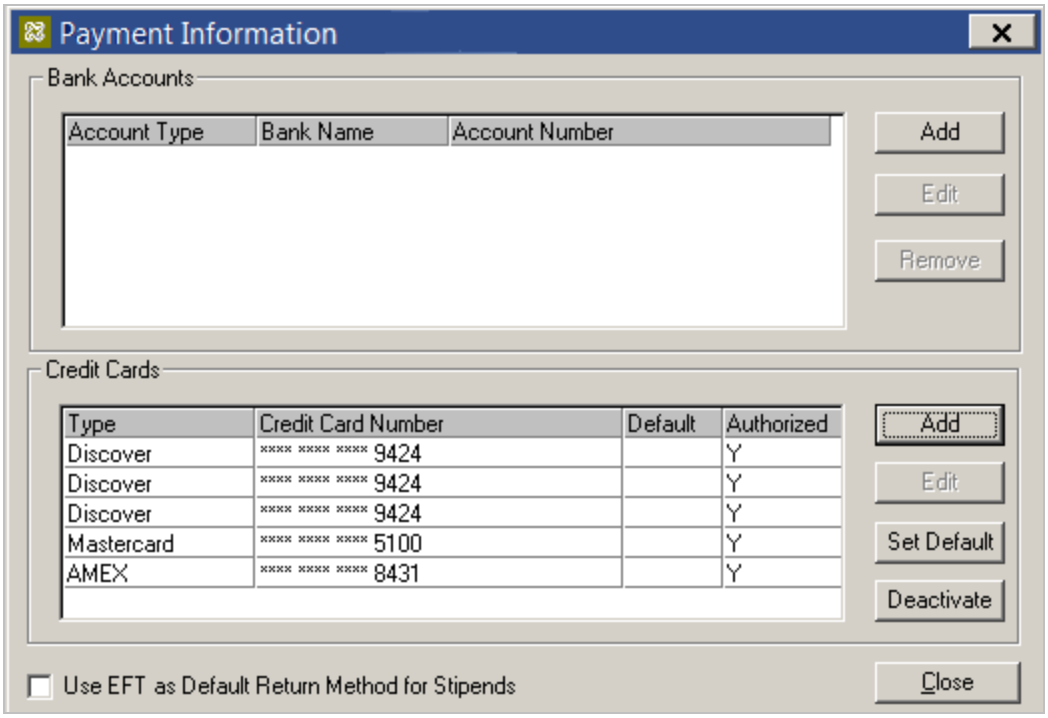
  An automatically generated record ID from CampusNexus Student is saved as an ID in CampusNexus Finance, HR & Payroll to keep track of the record while editing the record so that changes can be sent to the appropriate record CampusNexus Finance, HR & Payroll.

- If student bank account information is created in CampusNexus Finance, HR & Payroll, the values required by CampusNexus Student (i.e., Account Type, Bank Name, Account Number, and Routing Number) are sent to CampusNexus Student and saved in CampusNexus Student. If the record cannot be saved in CampusNexus Student, the record is not saved in CampusNexus Finance, HR & Payroll either, and a message is displayed.

To set up a student payment account:

1. Navigate to **View > Student Accounts** > **Payment Information**. The Payment Information form is displayed.

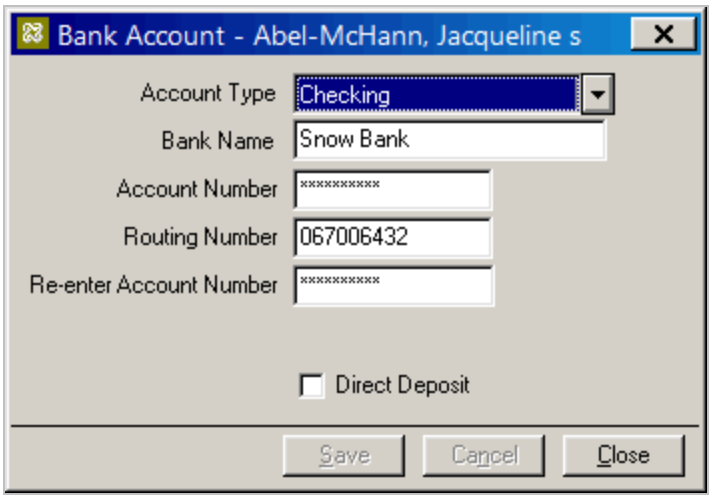
   Note: Bank information is only visible to users who have the appropriate level of permissions. When an account number is typed, it is visible to the person doing so. As soon as the information is saved, the account number is displayed with all but the last four digits masked for security purposes.



Note: The "Authorized" column indicates whether a card has been authorized by an actual credit card processor.

2. In the **Bank Accounts** section of the form:

   Click **Add**, or select a record and click **Edit**. The Bank Account form is displayed.



3. Select an **Account Type**. The options are Checking and Saving.
4. Specify the required **Bank Name**, **Account Number** and **Routing Number**.
5. Specify the Account Number a second time to validate that you have typed it correctly in the **Re-enter Account Number** field.
6. Select **Direct Deposit** if the student is authorizing withdrawals to be made through the bank account or would like to receive the refunds or stipends through ACH.

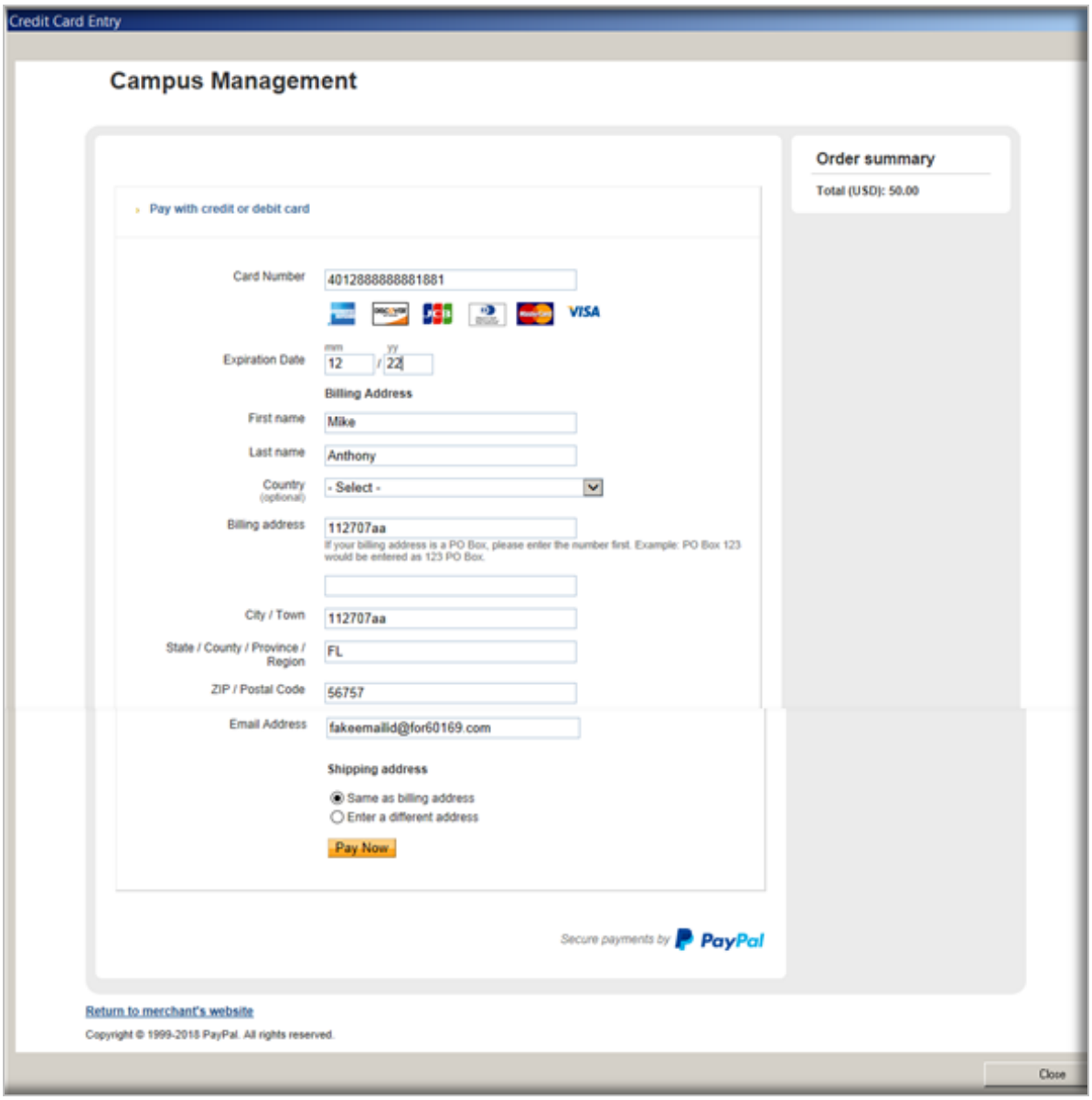
7. Select a record and click **Remove** to delete a bank account from the list.
8. In the **Credit Card** section of the form:

   Click **Add**, or select a record and click **Edit**. The Credit Card Information form is displayed.

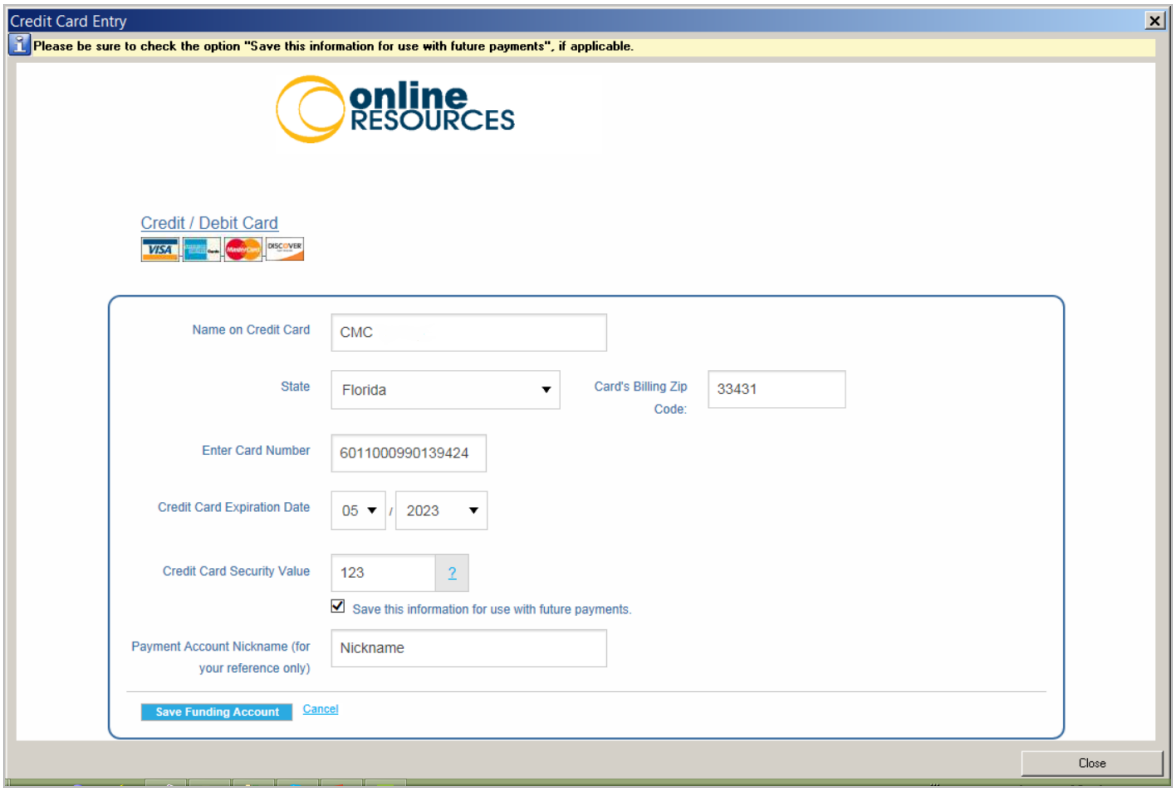
   Note: If the student's campus is **not** configured to Verify Credit Card Payments Posted Using CampusNexus Student (Campus Information - Electronic Processing Tab), you will proceed with this procedure as normal (steps 9 through 12).

   If the student's campus **is** configured to Verify Credit Card Payments Posted Using CampusNexus Student and you add a new credit card, you are redirected to the payment gateway provider's hosted page to enter credit card information.

   PayPal



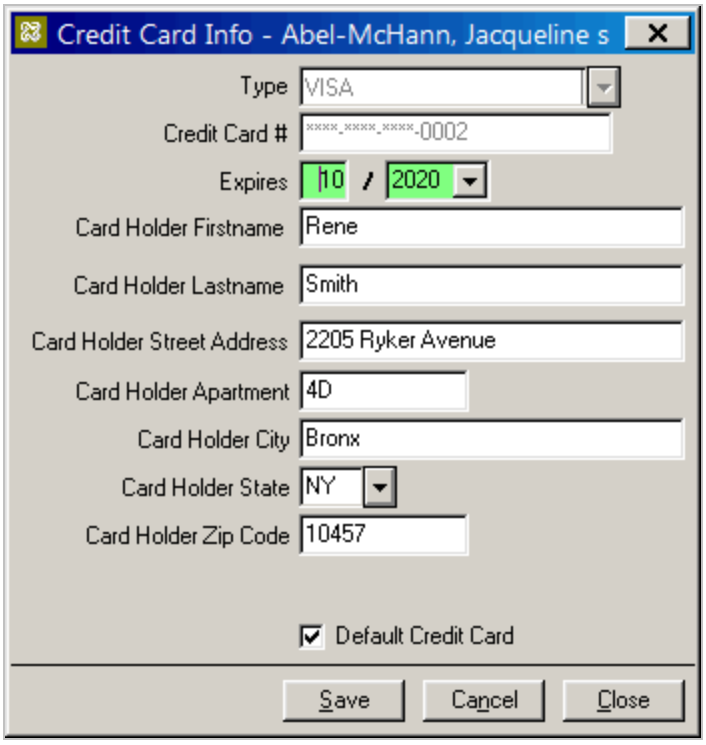
ACI



Note: When adding a credit card through a payment gateway provider's hosted page, a unique ID is stored in the CampusNexus Student database instead of the actual credit card number. This unique ID is used to communicate with the payment gateway provider and to identify the correct student's credit card for processing credit card transactions.

You will not have the ability to edit credit cards when using this redirect and will need to deactivate any expired or invalid cards and add new cards as needed.

9. Select a credit card **Type** and fill in all fields as required.

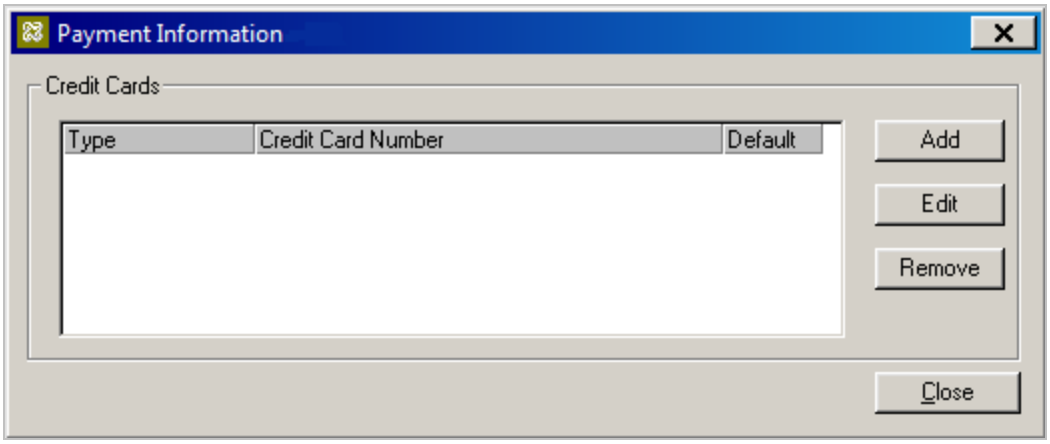


10. Select a record and click **Remove** to delete a credit card from the list.
11. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. You are returned to the Payment Information form.
12. Select**Use EFT as Default Return Method for Stipends** to use the Electronic Funds Transfer (EFT) return method and override any of the default return method configurations for all scheduled stipends created for the indicated student.

    Note: The ACH return method still has the highest priority and appears if the student has a bank account configured for direct deposit, regardless of the EFT setting for the student.

To set up an agency payment account:

1. Navigate to **Daily > Contact Manager** > **Agency/Third Party** > **Add/Edit** (button) > **Branches** > **Payment Information** (button). The Payment Information form is displayed.



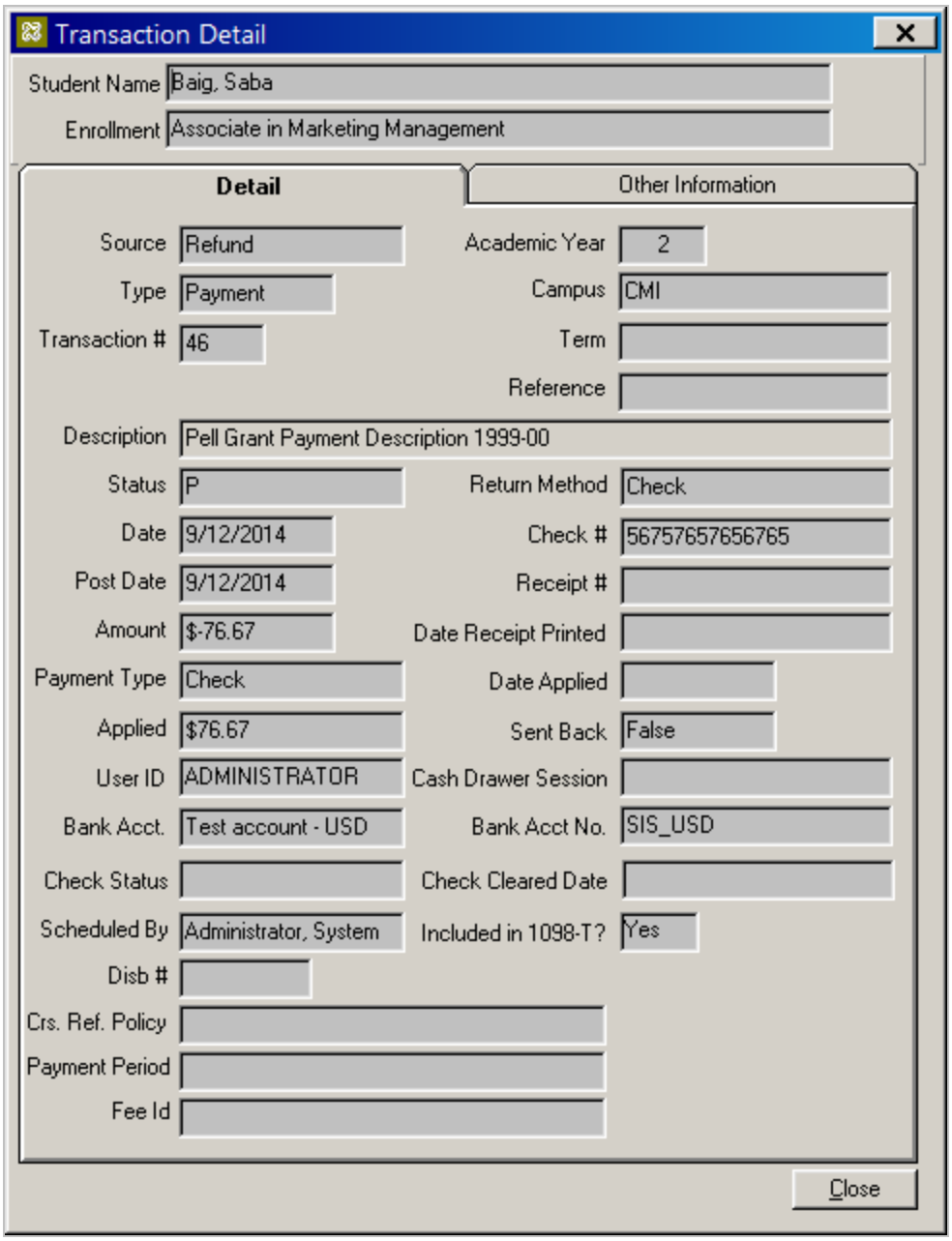
2. Agency payments may only be processed using a credit card. Click **Add**, or select a record and click **Edit**. The Credit Card Information form is displayed.
3. Select a credit card **Type** and fill in all fields as required.
4. Select a record and click **Remove** to delete a credit card from the list. A confirmation message is displayed. Click **Yes**.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. You are returned to the Payment Information form.

Transaction Detail

When you click the **Transaction Detail** button on the Ledger Card form or on the Student Subsidiaries form, the Transaction Detail form is displayed. The Transaction detail form contains a Detail tab and an Other Information tab.

Detail Tab

The **Detail** tab on the Transaction Detail form is read-only and is only accessible upon selecting a payment, void, or NSF record from the Student Ledger Cards or Student Subsidiaries form.



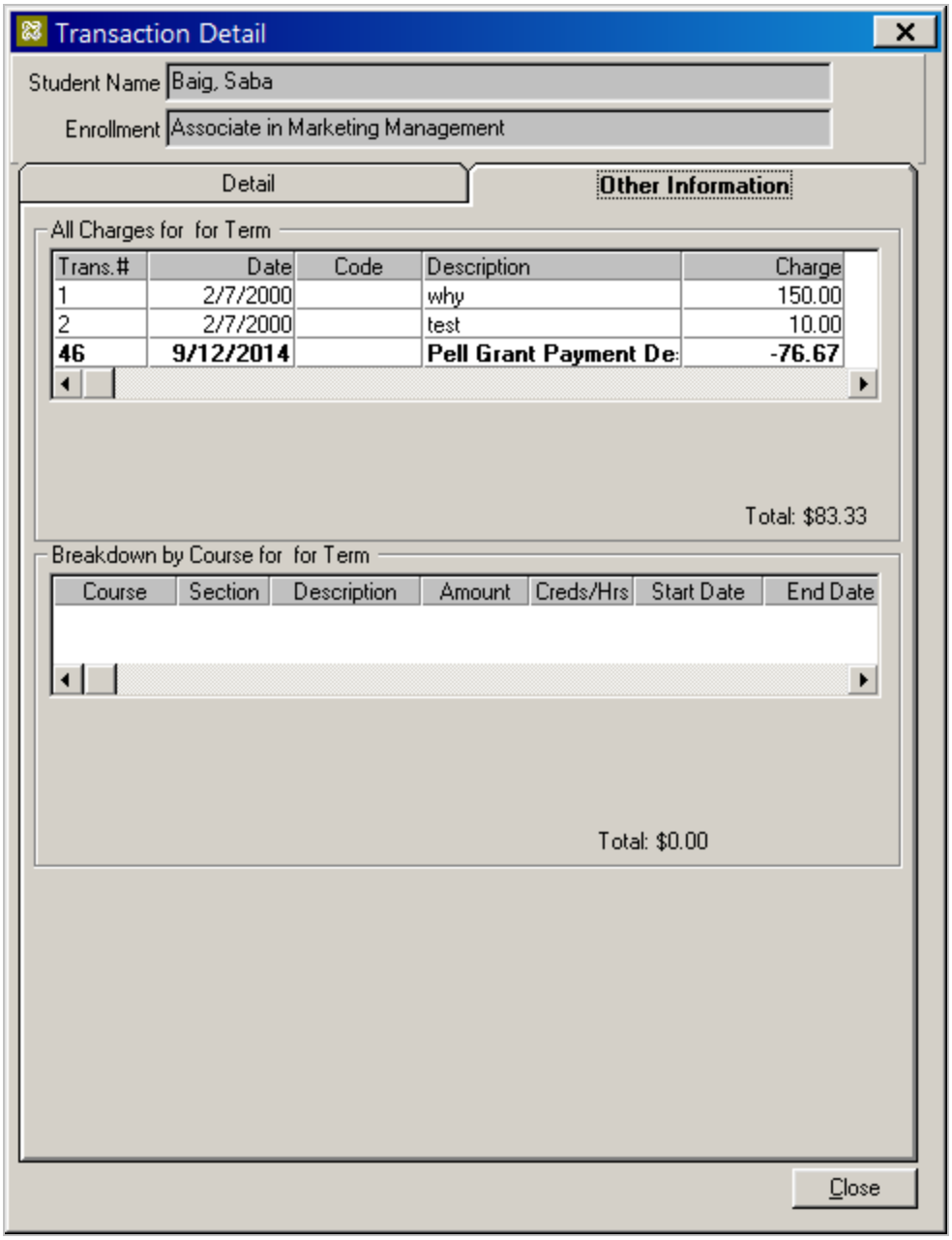
Field Descriptions: Transaction Detail Tab

Field	Description
Source	The source of the transaction.
Type	Type of transaction: Credit Memo, Debit Memo, Invoice, or Payment.
Transaction #	Number of the transaction as it appears on the student's Ledger Card.
Academic Year	Number of the student's academic year to which this transaction applies.
Campus	The campus code for the campus where the transaction occurred.
Term	The term for which this transaction applies.
Reference	Some reference note to explain the transaction.
Description	A description of the transaction
Status	Status of the transaction: • F - Paid in Full • O - Open • P - Partial Payment
Date	Transaction date.
Post Date	Date when the transaction was posted.
Amount	Amount of the transaction.
Payment Type	Payment Type Codes: • C - Cash • E - EFT • H - Check • N - Non-cash • O - Other • R - Credit Card **Note**: The credit card number displayed is masked using the format: "**********####", where * represents the masked number and #### is replaced by the last four digits on the credit card.
Applied	Amount applied from this transaction. This allows you to split the transaction across multiple purposes.
User ID	The User ID of the person who entered the transaction is recorded for tracking purposes.
Bank Acct.	The Bank Account Description associated with the transaction. This information is set up in Lists > Student Accounts > Bank Codes.
Check Status	The check status: • S - Sent • C - Cleared • V - Void • U - Unclaimed
Scheduled By	The user who scheduled the transaction.

Field	Description
Disb #	The disbursement number associated with the refund. This field can contain one or more numbers, depending upon how the user set up the disbursements and refunds.
Crs. Ref. Policy	The name of the Course Refund Policy used to calculate the selected refund adjustment.
Payment Period	The payment period associated with the payment.
Fee Id	The identification number of the fee.
Return Method	The Return Method defined by the IRS and set by each campus is Payments Received or Amounts Billed.
Check #	If paid by check, include the number of the check.
Receipt #	If a receipt is issued, include the number of the receipt.
Date Receipt Printed	The date on which a receipt was generated in CampusNexus Student. A blank field indicates no receipt was printed.
Date Applied	The date when the amount in the Applied field was applied to the transaction described here.
Sent Back	True or False.
Cash Drawer Session	The Cash Drawer Session associated with the transaction.
Bank Acct No.	The Bank Account Number associated with the transaction. This information is setup via the Lists > Student Accounts > Bank Codes tab > Accounts button path.
Check Cleared Date	The date when the check was cleared.
Included in 1098-T?	Yes or No. See also 1098-T Setup and Process 1098-Ts. **Note**: The Included in 1098-T? check box and label are visible for payments and charges. 'Yes' is displayed if the corresponding field for the transaction in the 1098-T Processing Utility is set to 'I'. 'No' is displayed if the corresponding field for the transaction in the 1098-T Processing Utility is set to 'N' or any value other than 'I'. For payments, you can refer to this check box to determine if a payment on the student's ledger card is flagged to be included for 1098-T processing. Note that while the 1098-T setting on the ledger card is visible to users for all payments, it is not possible to change this setting on loans. Regardless of this setting, the 1098-T Processing Utility only gathers payment transactions for scholarships, grants, ACG, SMART, TEACH, or Other category of fund source types. If a payment period is associated with the transaction, the payment period information is displayed here. The fields displayed in this box are Academic Year (Ac Yr), Payment Period (Pmt Per), and the Payment Period start and end dates.

Other Information Tab

The Other Information tab displays a breakdown of the transactions displayed in the Ledger Card form by code.

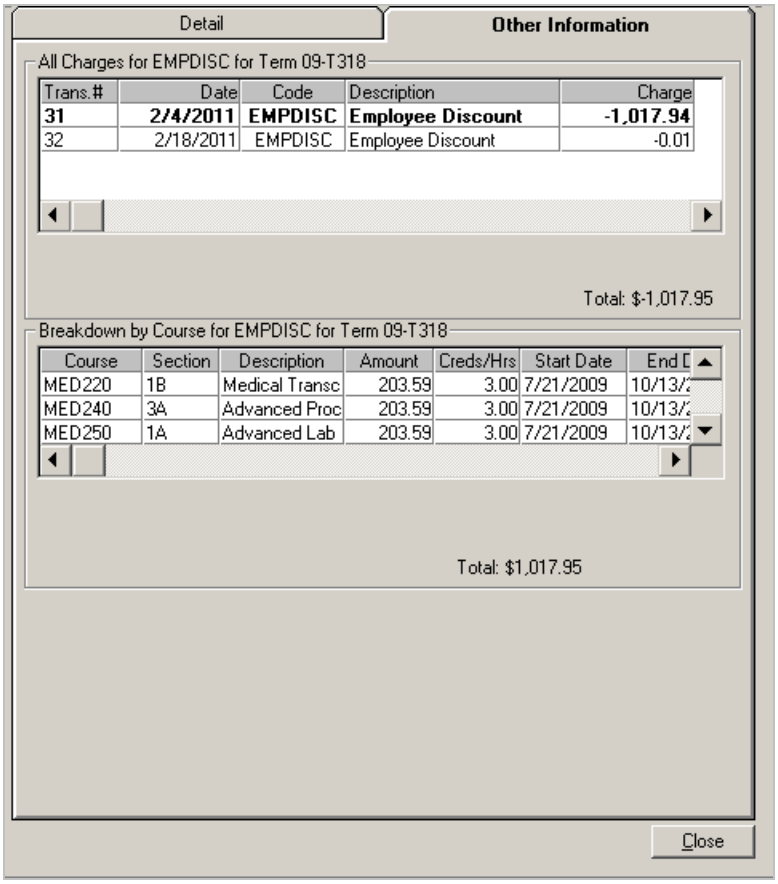


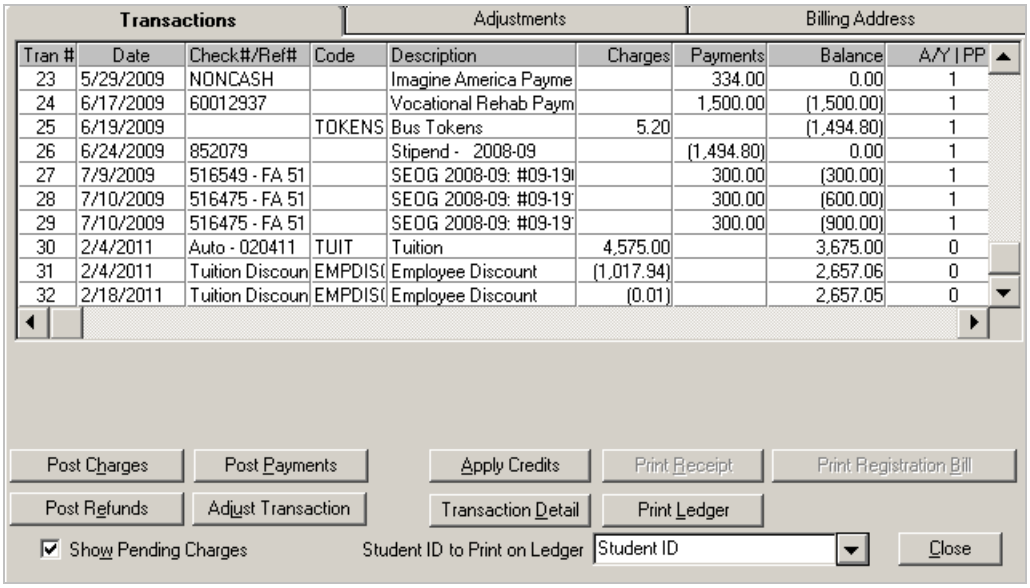
Field Descriptions: Other Information Tab

Field	Description
All Charges for Term	
Trans #	Transaction number
Date	Transaction date
Code	Transaction code
Description	Transaction description

Field	Description
Charge	Transaction charge
Breakdown by Course for Term	
Course	Course code
Section	Course section code
Description	Course description
Amount	Amount charged for the course
Creds/Hrs	Number of credits or hours for successful completion of the course
Start Date	Start date of the course
End Date	End date of the course
Instructor	Name of the course instructor
Date Added	Date the transaction was posted

When the Posting Type in Billing Methods is configured as Aggregate, an itemization of the individual courses that make up a charge and detailed information about them is displayed at the bottom of this form. At the top part of the form the individual courses that make up a charge roll up into one record. This one record also appears on the top of the Student Ledger Card. Likewise, when the Posting Type is Aggregate, tuition discounts roll up into one record on the Student Ledger Card, and the Transaction Detail shows the breakdown of the discount amount per course (See line item #31 in both examples below).


Detail
Other Information
All Charges for EMPDISC for Term 09-T318
Trans.# Date Code Description Charge
31 2/4/2011 EMPDISC Employee Discount -1,017.94
32 2/18/2011 EMPDISC Employee Discount -0.01
Total: $-1,017.95
Breakdown by Course for EMPDISC for Term 09-T318
Course Section Description Amount Creds/Hrs Start Date End D
MED220 1B Medical Transc 203.59 3.00 7/21/2009 10/13/2
MED240 3A Advanced Proc 203.59 3.00 7/21/2009 10/13/2
MED250 1A Advanced Lab 203.59 3.00 7/21/2009 10/13/2
Total: $1,017.95
Close


Transactions
Adjustments
Billing Address
Tran # Date Check#/Ref# Code Description Charges Payments Balance A/Y | PP
23 5/29/2009 NONCASH Imagine America Payme 334.00 0.00 1
24 6/17/2009 60012937 Vocational Rehab Paym 1,500.00 (1,500.00) 1
25 6/19/2009 TOKENS Bus Tokens 5.20 (1,494.80) 1
26 6/24/2009 852079 Stipend - 2008-09 (1,494.80) 0.00 1
27 7/9/2009 516549 - FA 51 SEOG 2008-09: #09-19 300.00 (300.00) 1
28 7/10/2009 516475 - FA 51 SEOG 2008-09: #09-19 300.00 (600.00) 1
29 7/10/2009 516475 - FA 51 SEOG 2008-09: #09-19 300.00 (900.00) 1
30 2/4/2011 Auto - 020411 TUIT Tuition 4,575.00 3,675.00 0
31 2/4/2011 Tuition Discoun EMPDIS Employee Discount (1,017.94) 2,657.06 0
32 2/18/2011 Tuition Discoun EMPDIS Employee Discount (0.01) 2,657.05 0
Post Charges
Post Payments
Apply Credits
Print Receipt
Print Registration Bill
Post Refunds
Adjust Transaction
Transaction Detail
Print Ledger
Show Pending Charges
Student ID to Print on Ledger
Student ID
Close

Student Subsidiaries

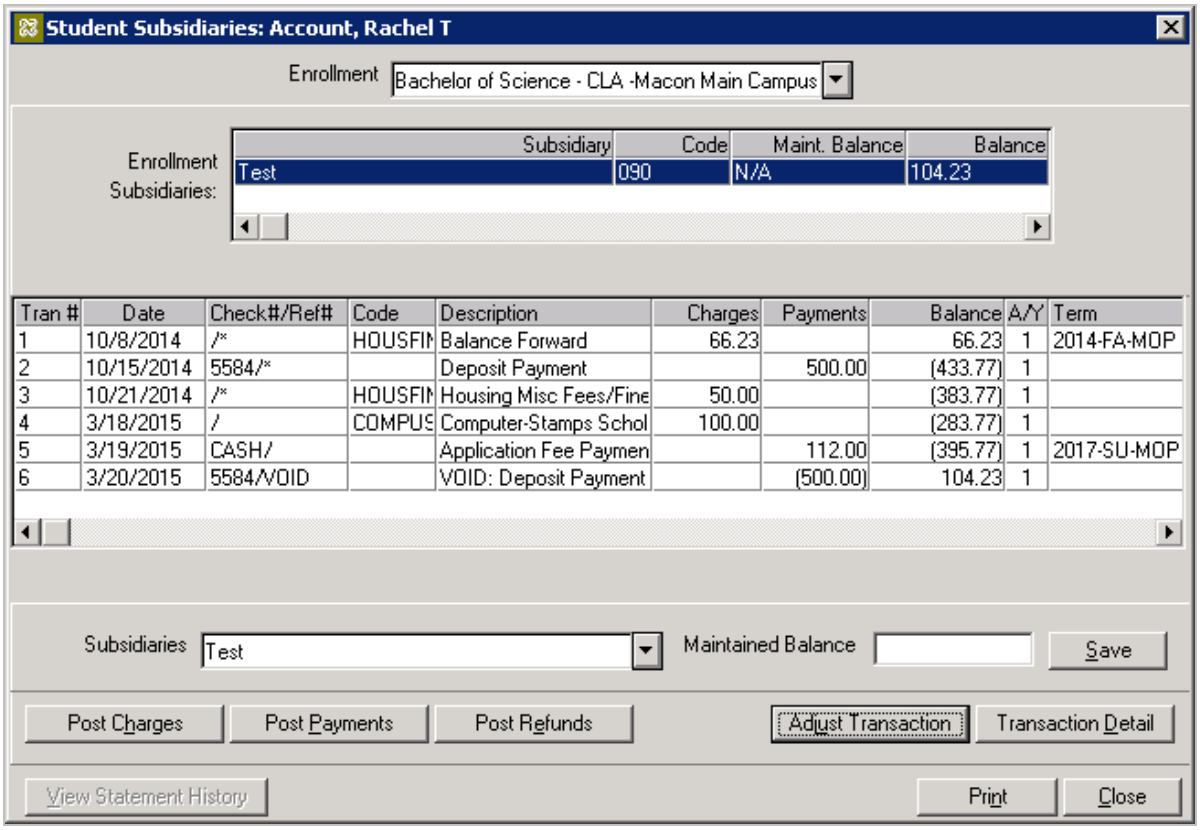
Transactions posted to a student's subsidiary account do not affect the student ledger card balance but affect the balance of the subsidiary. Funds can be released from a subsidiary to the student general ledger card to address situations that arise, for example, when a student pays a housing deposit and then must be charged for damages out of that deposit.

Refer to the following topics related to student subsidiaries:

- Creating a subsidiary
- Configuring a maintained balance
- Posting payments or charges to a subsidiary
- Posting refunds
- Processing refunds/stipends
  Refer to this topic for information about specific conditions that apply when CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll.
- Adjusting a transaction
  Refer to this topic for information about limitations that apply when adjusting a transaction and specific conditions that apply when CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll.
- Viewing transaction details
- Transferring subsidiary transactions upon an enrollment transfer

To create a subsidiary:

1. Select a student.
2. Navigate to **View** > **Student Accounts** > **Subsidiary**. The Student Subsidiaries form is displayed (if the 'Use Subsidiary' setup flag is True).



3. Select an **Enrollment**.
4. Select a subsidiary in the **Subsidiaries** field.
5. Enter the **Maintained Balance** amount for the selected subsidiary for that student. This is the balance the student must maintain in the subsidiary. This is entered in the form of a credit balance. For example, if a student must have $500.00 balance on file, that will reflect as a credit balance of -500.00 or be displayed as (500.00).
6. Click **Save**. The saved subsidiary appears in the Enrollment Subsidiaries section displaying the Subsidiary name, Code, Maintained Balance, and Balance. The balance is calculated using the same logic that is used for the regular ledger card. Payments create a negative balance, while charges increase the balance.

   As charges and payments are posted to the subsidiary, they appear beneath the Enrollment Subsidiaries section of the form, displaying details such as Transaction number, Date, Check number and Reference number, Code, Description, Charge amount, Payment amount, Academic Year, and Term.
7. Click **Print** to print a report of the charges and payments posted to the selected subsidiary.

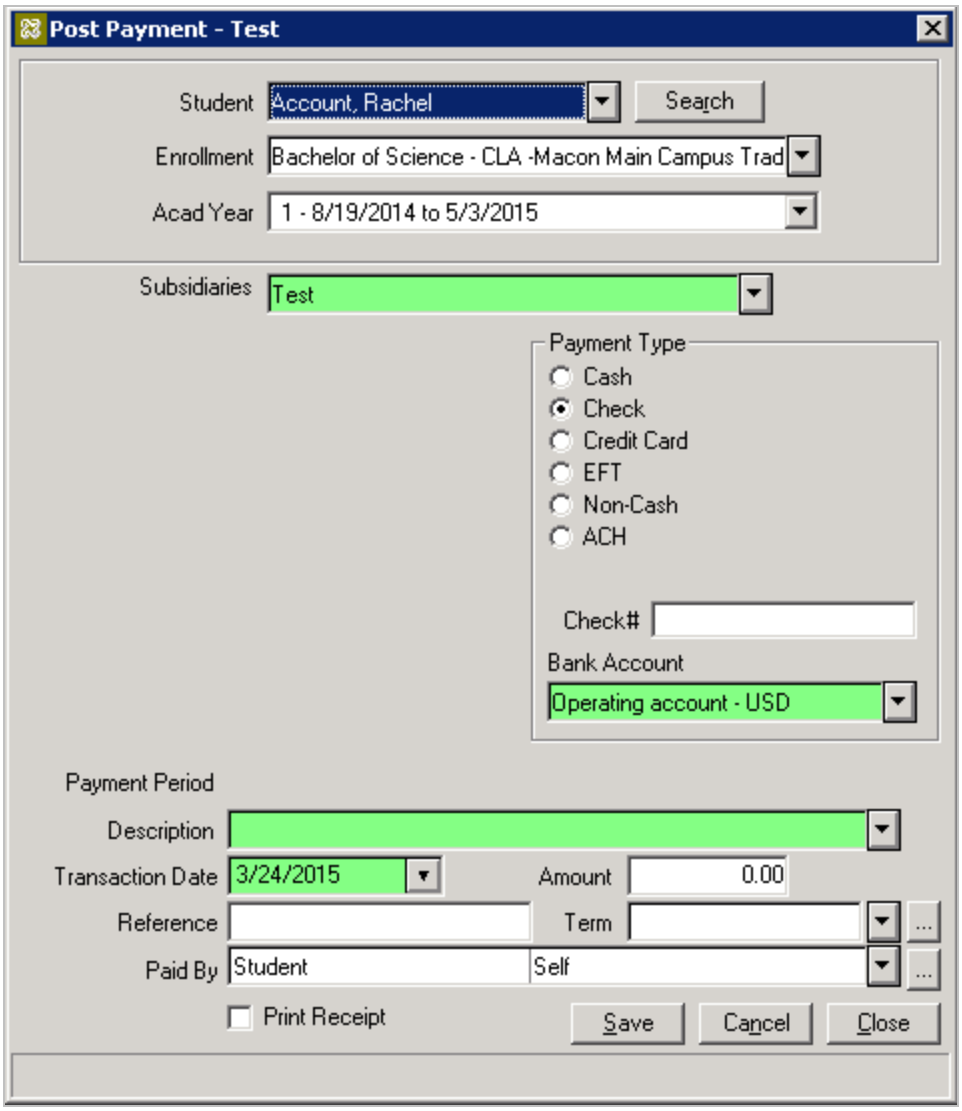
   Note: You can also print Subsidiary statements for 'All Enrollments' from the Subsidiary form.

To post payments or charges to a subsidiary:

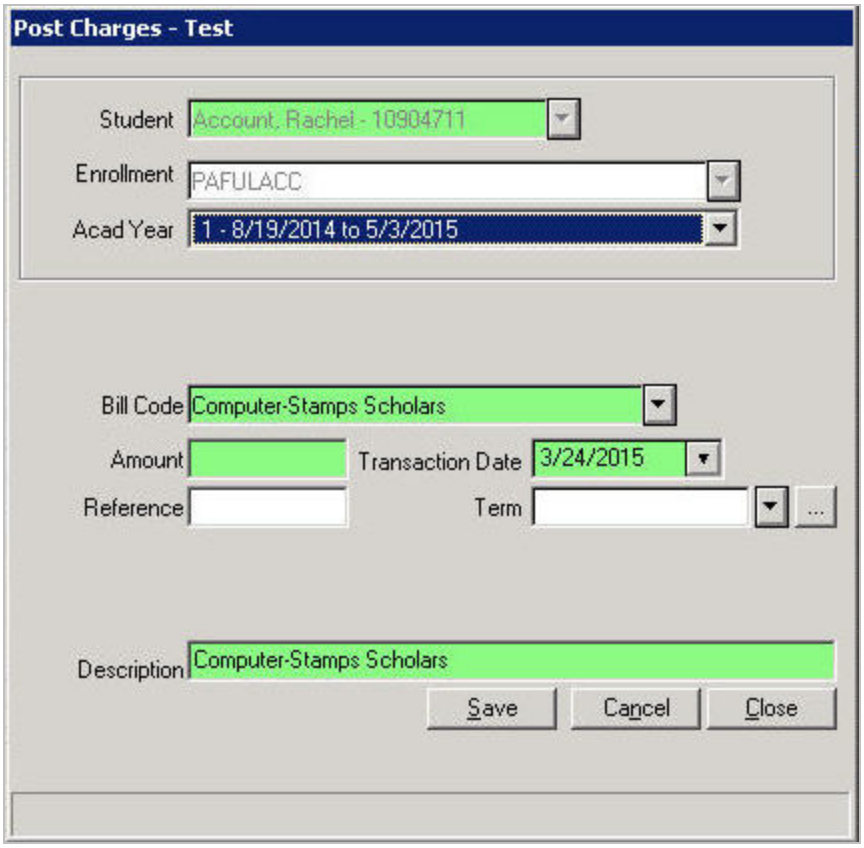
A new subsidiary can have payments and charges posted to it. Payments create a negative balance while charges increase the balance. You can designate to which subsidiary a payment is posted.

When a charge is posted with a transaction code that is associated with a subsidiary, the charge is posted only to the appropriate subsidiary without being reflected on the student ledger card. If the student has a credit balance in the subsidiary due to a deposit and that amount is not enough to cover the cost of the charge, there will be a positive balance on the subsidiary.

1. Navigate to **View** > **Student Accounts** > **Subsidiary**. The Student Subsidiaries form is displayed.
2. Select a subsidiary from the **Enrollment Subsidiaries**.
3. To post a payment, click **Post Payment**. The Post Payment form is displayed. The name of the selected subsidiary is displayed on the title bar.



4. To post a charge, click the **Post Charges** button. The Post Charges form is displayed. The name of the selected subsidiary is displayed on the title bar.



5. Complete applicable fields on the Post Payment or Post Charges form.
6. Click **Save**.
    - For a payment, only the balance on the subsidiary is affected.
    - For a charge, the balance on the subsidiary is increased.
7. Click **Close** to close the form. You are returned to the Student Subsidiaries form, which now displays the payment or charge you just posted.
8. Click **Print** to print a receipt for the payment or charge. You can view the receipt before it is printed.
9. Click **Close** to close the form.

Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

Audit Features

The audit features for Student Accounts include:

- CampusNexus Student stores the name of the payee on each refund record, stipend record, and subsidiary refund so that it can be retrieved for reporting purposes.
- CampusNexus Student audits changes to the payee for refunds and stipends. Auditing occurs from the time the refund or stipend is scheduled to the time the refund or stipend is processed. The date changed, time changed, and the user who made the change are audited.
- Payee changes are audited for subsidiaries.

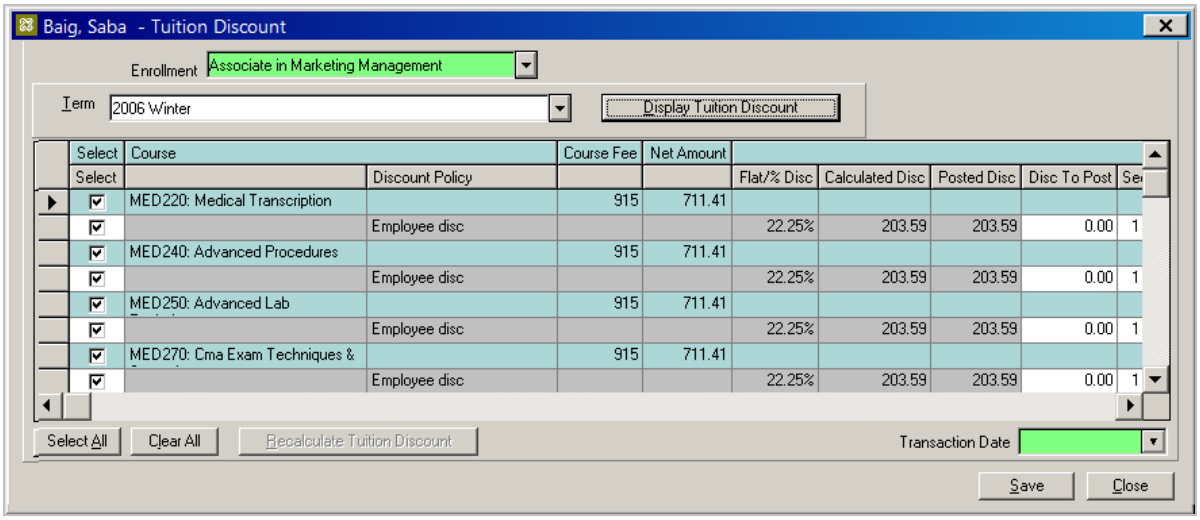
- Payee information for a stipend can be edited regardless of the fund source associated with the stipend. The payee changes are audited for all stipends.
- Your ability to edit a payee for a refund is dependent on the fund source associated with the refund. The payee changes are audited only for the fund sources that allow the payee to be changed.
- You can sort on different columns of the grids available in the Process Refunds/Stipends wizard.
- A student account administrator can define that the Reference information is printed on the check, below the address, or on the stub, or in both places.
- A student account administrator can view the ID of the user who scheduled the refund/stipend using the Ledger Card, Transaction Detail button.
- CampusNexus Student stores the user ID of the user who scheduled the stipend so that it does not get overwritten by the user ID of the user who posted the stipend.

Tuition Discounts

Use this procedure to find the tuition discount policies available for a student and post the amount of discount that needs to be provided to the student.

To post tuition discounts for a student:

1. Select a student.
2. Navigate to **View > Student Accounts > Tuition Discounts**. The Tuition Discount form is displayed.
3. Select the **Enrollment**.
4. If the enrollment is by term, select the **Term** for which the tuition discounts need to be applied or processed for the student.
5. If the enrollment is by payment period, select the **Ac. Year** and **Pmt. Per.** for which the tuition discounts need to be applied or processed for the student.
6. Click **Display Tuition Discount** to view the discount policies defined for the student's campus.



The columns in the form are now populated with the following information for each applicable tuition discount policy.

Column Descriptions

Column	Description
Course	The name of the course if the billing method for the policy is **By Course/Payment Period with Post Transaction Details**. If the billing method for the policy is **By Term**, this column has a **Details** button. Click this button to display all the courses taken by the student in the selected term which qualify for the discount policy.
Discount Policy	The name of the applicable policy.
Course Fee	The amount charged for the course. The course amount cannot be edited.

Column	Description
Net Amount	The discounted amount for the course.
Flat% Disc.	The discount amount for the policy calculated on a flat rate basis. **Note**: It is not recommended to change discount percentages or flat rates on a Tuition Discount Policy once discounts have been posted for a given policy.
Calculated Disc.	The amount of tuition discount that should be paid to the student based on the tuition discount policy. The Calculated Discount Amount will be the maximum amount to be posted if some previous discounts are already posted. If the discount amount for the policy has to be calculated on a flat rate basis, this column will be blank.
Posted Disc	The amount that has already been posted. The system keeps a running sum of the discounts per course.
Disc To Post	The discount amount that needs to be posted for the student for each tuition discount policy. If no previous discount has been posted, the discount to post amount will be updated once the Seq. number is entered, so that CampusNexus Student does not post more than the course amount.
Seq	This is the order in which the tuition discount policies are to be processed. There should not be a duplicate sequence number for a course. This column is required if multiple discounts are available for the course; it is not required if there is only one discount available for the course.

7. Click **Select All** to select all the Courses and Discount Policies displayed; click **Clear All** to clear the selection.

   Note: If a check box cannot be selected, it is because the course is in a Drop status and you cannot select the course for posting.

8. Click **Recalculate Tuition Discount** to update the Tuition Discounts by incorporating any changes that occurred.
9. Select the **Transaction Date** for posting the tuition discount amounts.

   Note: When automated billing is in use with the Post Transaction Details option selected, the Transaction Date for each tuition discount in the payment period will be equal to the course section date.

10. Click **Save** to post the tuition discount amounts.
11. Click **Close** to close the form.

Collections

Students attending an institution are expected to pay for tuition and all other fees and charges. This may be done through financial aid, loans, or student payments. If the student pays the bill and a payment plan is developed between the institution and the student, that plan must be repaid based on the institution's payment schedule. Failure to do so can place a student into a "Collections" status. Collections can be handled internally by the institution if the student is still active or by outside collections agencies if the student has graduated or dropped.

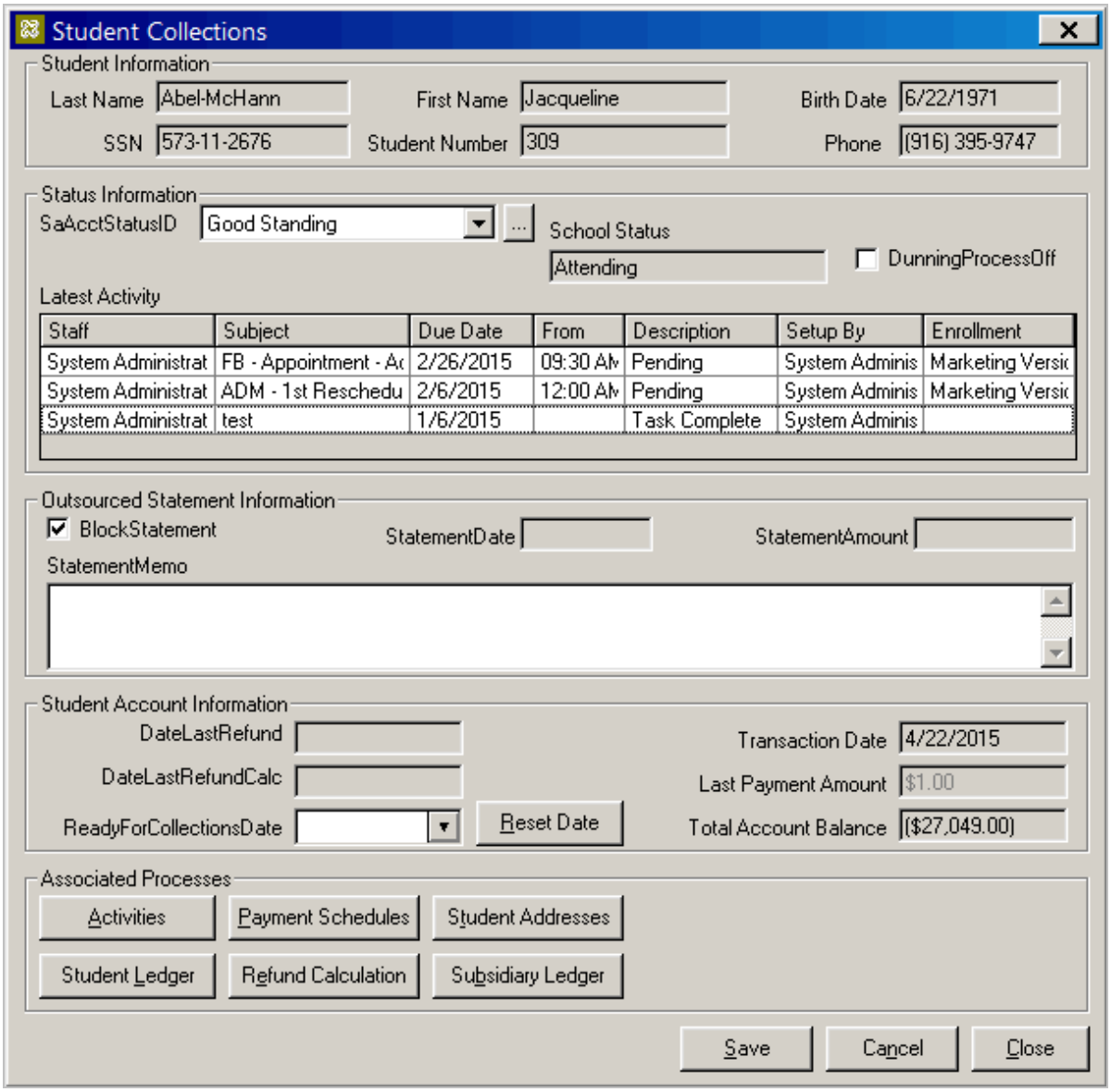
Once a student is in a collections status; various processes and tasks must be performed by the institution to collect any monies due, commonly referred to as the "dunning process". Typical activities include – having collection's payment schedules produced; activities scheduled, letters sent, evaluations to whether student account balances are written off, and tracking of where a student is in the dunning process.

The User Toolbar will now display multiple collection statuses, if multiple selections were made in the Student Collections form.

See Field Level Security below.

To manage Student Collections:

1. Navigate to **View > Student Accounts > Collections**. The Student Collections form is displayed.



2. The Student Information section contains fields that are not editable.
3. In the Status Information section, select a **Collections Status** (**SaAcctStatusID**). If an Enrollment activity has been created for this status, it will be activated/created once the status is saved.
4. Select **Dunning Process Off** if you want the Dunning Process to be disabled or clear the check box to activate the Dunning Process.
5. The Latest Activity grid lists the last three activities associated with the collection.
6. In the Outsourced Statement Information section, select **Block Statement** to block outsourced statements, otherwise clear the field.
7. The Statement Date and Statement Amount fields are read-only.

8. In the **Statement Memo** field enter comments that will appear on the student statement that is produced by the outside vendor/source.
9. Student Account Information
10. In the **ReadyForCollectionsDate** field, enter the start date for collections.

    If a fund source marked with "Use for Outside Collections" has been created for the campus, a new payment schedule is created using the date set in this field. The payment schedule will reflect the "total amount due" from the student to the school. The fund source for this payment plan will be the default Out of School Collections assigned to the enrollment campus. If the fund source cannot be retrieved, the following message is displayed: *"No Outside Collections fund source available to the student's campus. Scheduled Payment can not be created."* The current enrollment will be assigned to the scheduled payment.
11. The Last Payment Date, Last Payment Amount, and Total Account Balance fields are read-only.

    The Date Refund Last Calculated date is the date when the last Actual refund was calculated for the student. If no refund has been calculated, the field is left blank.

    The Date Last Refund date is the date of the last paid refund for the student when all refunds have been paid. For example, if a student has three scheduled refunds, and all three are paid, the latest date is used; however, if no refunds exist or if refunds are still scheduled, the field is left blank.
12. Click **Reset Dates** to clear the dates and cancel scheduled payments.
13. The Associated Processes options allow you to access other areas of CampusNexus Student that pertain to the student collection process.
    - Click **Activities** to schedule an activity. See also Activities.
    - Click **Payment Schedules** to schedule or view a payment. See also payment schedule.
    - Click **Student Addresses** to view the student's addresses. See also address.
    - Click **Student Ledger Card** to view the student's ledger card. See also ledger cards.
    - Click **Refund Calculation** to view the student's refund calculation. See also refund calculation.
    - Click **Subsidiary Ledger** to view the student's subsidiary ledger. See also student subsidiaries.
14. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

    Note: If you click Close without saving the information, the following message is displayed: *"Unsaved data exists for student. Do you want to exit?"* Click **Yes** to exit or **No** to return to the Student Collections form.

To set Field Level Security for the form:

Leave the Collections form displayed, and navigate to Setup > Field Level Security. Set the field level security for the fields in the Collections form.

Audit Features

The audit features for Student Accounts include:

- CampusNexus Student stores the name of the payee on each refund record, stipend record, and subsidiary refund so that it can be retrieved for reporting purposes.
- CampusNexus Student audits changes to the payee for refunds and stipends. Auditing occurs from the time the refund or stipend is scheduled to the time the refund or stipend is processed. The date changed, time changed, and the user who made the change are audited.
- Payee changes are audited for subsidiaries.
- Payee information for a stipend can be edited regardless of the fund source associated with the stipend. The payee

changes are audited for all stipends.

- Your ability to edit a payee for a refund is dependent on the fund source associated with the refund. The payee changes are audited only for the fund sources that allow the payee to be changed.
- You can sort on different columns of the grids available in the Process Refunds/Stipends wizard.
- A student account administrator can define that the Reference information is printed on the check, below the address, or on the stub, or in both places.
- A student account administrator can view the ID of the user who scheduled the refund/stipend using the Ledger Card, Transaction Detail button.
- CampusNexus Student stores the user ID of the user who scheduled the stipend so that it does not get overwritten by the user ID of the user who posted the stipend.

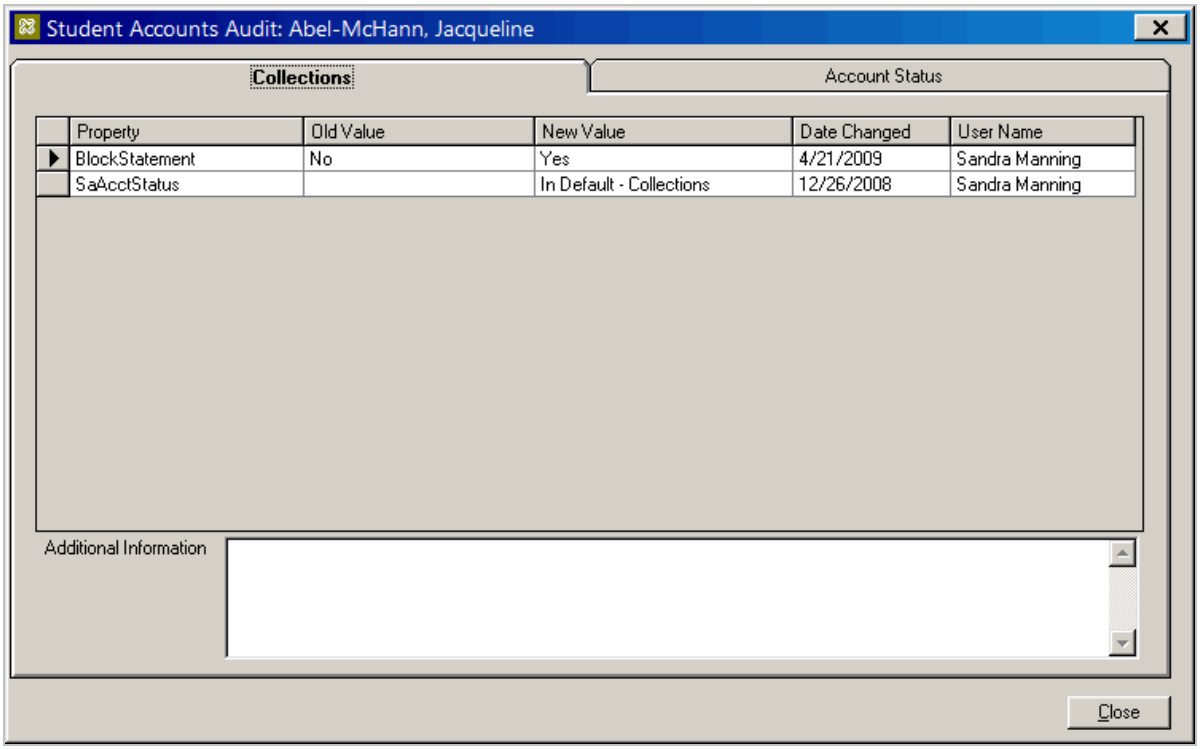
Student Accounts Audit

The Student Accounts Audit form displays changes to a student's account status and collections. The fields on the grid include Property, Old Value, New Value, Date Changed, User Name, and Additional information. CampusNexus Student includes variable data in the additional information field to describe the recorded change further. This is a read-only form.

To view the Student Accounts Audit folder:

1. Select the student for whom you want to view the student accounts history.
2. Navigate to **View** > **Student Accounts** > **Audit**. The Student Accounts Audit form is displayed.

   The Account Status displays changes made to the student's account status. The Collections tab displays changes made while processing collections.



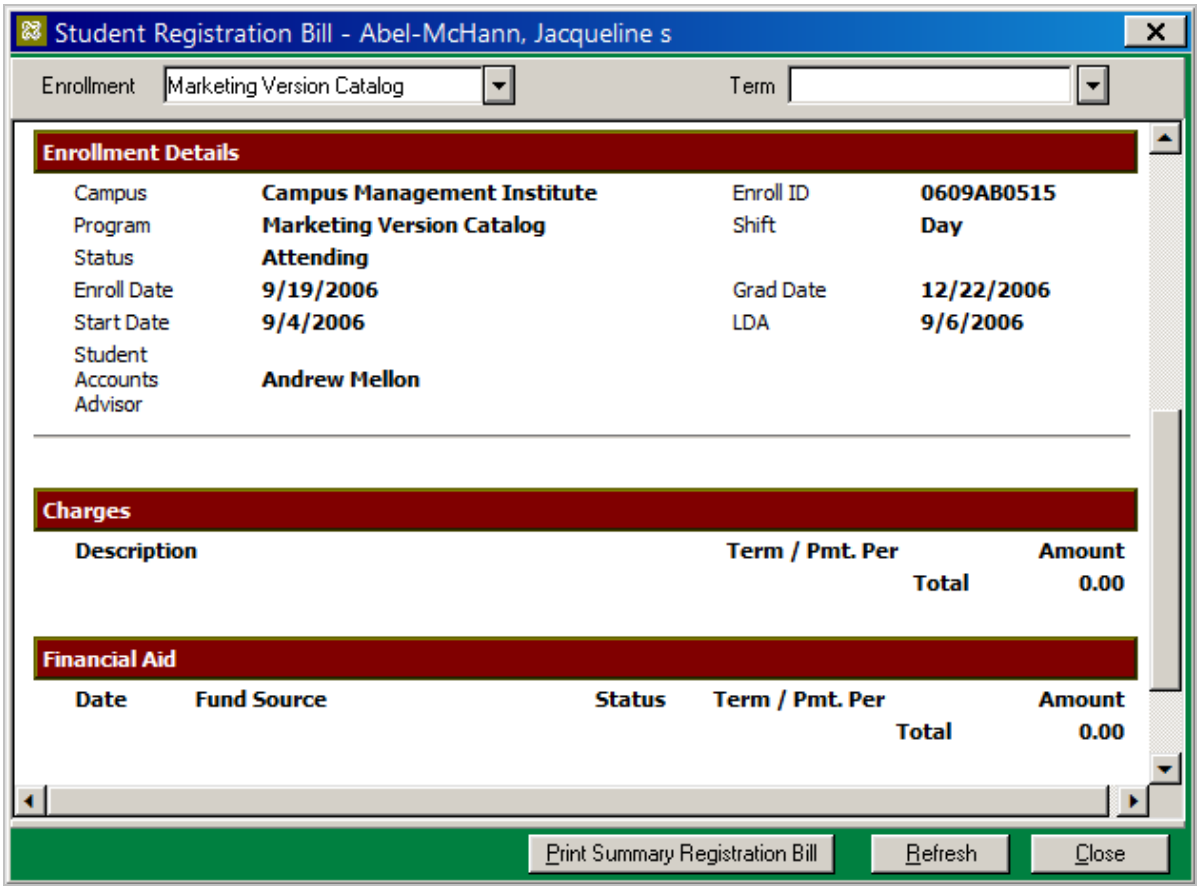
3. Click **Close** to close the form.

Student Registration Bill

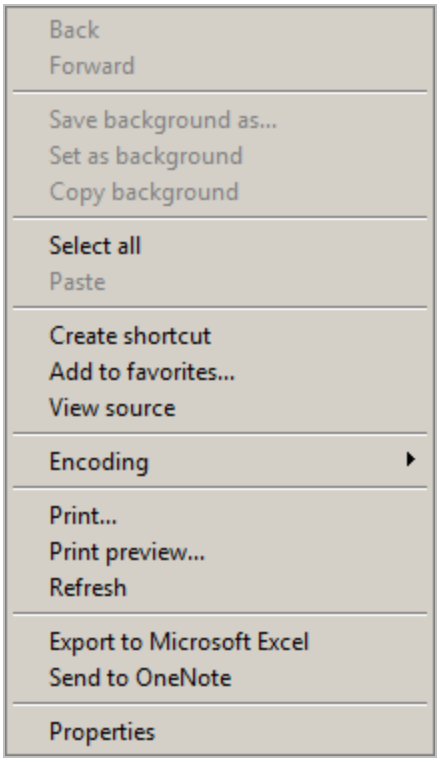
The Student Registration Bill is a report of the student balance with summarized charges, financial aid, payments, enrollment details, and a detailed breakdown of charges, financial aid, and payments.

To run the Student Registration Bill report:

1. Select a student.
2. Navigate to **View** > **Student Accounts** > **Registration Bill**. The Student Registration Bill form is displayed.

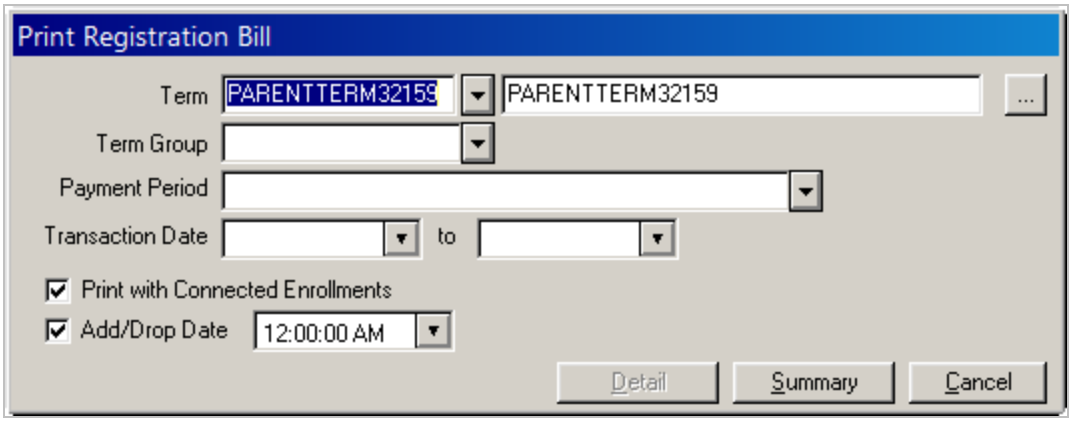


3. If the student has more than one enrollment or term/payment period, select an **Enrollment**or **Term/Payment Period** and click **Refresh**.
4. Click the section headings to view associated forms, such as the Enrollment form.
5. Right-click the report to access a shortcut menu with the following options:



6. Click **Print Registration Bill** to print the report. The Print Registration Bill form is displayed.

   Note: If both Summary Registration Bill and Detail Registration Bill were configured in Registration Bill Defaults, a pop-up menu appears when you click the Print button. If only the Summary option or only the Detail option was configured in the default settings, the Print button caption will read Print Summary Registration Bill or Print Detail Registration Bill, respectively.

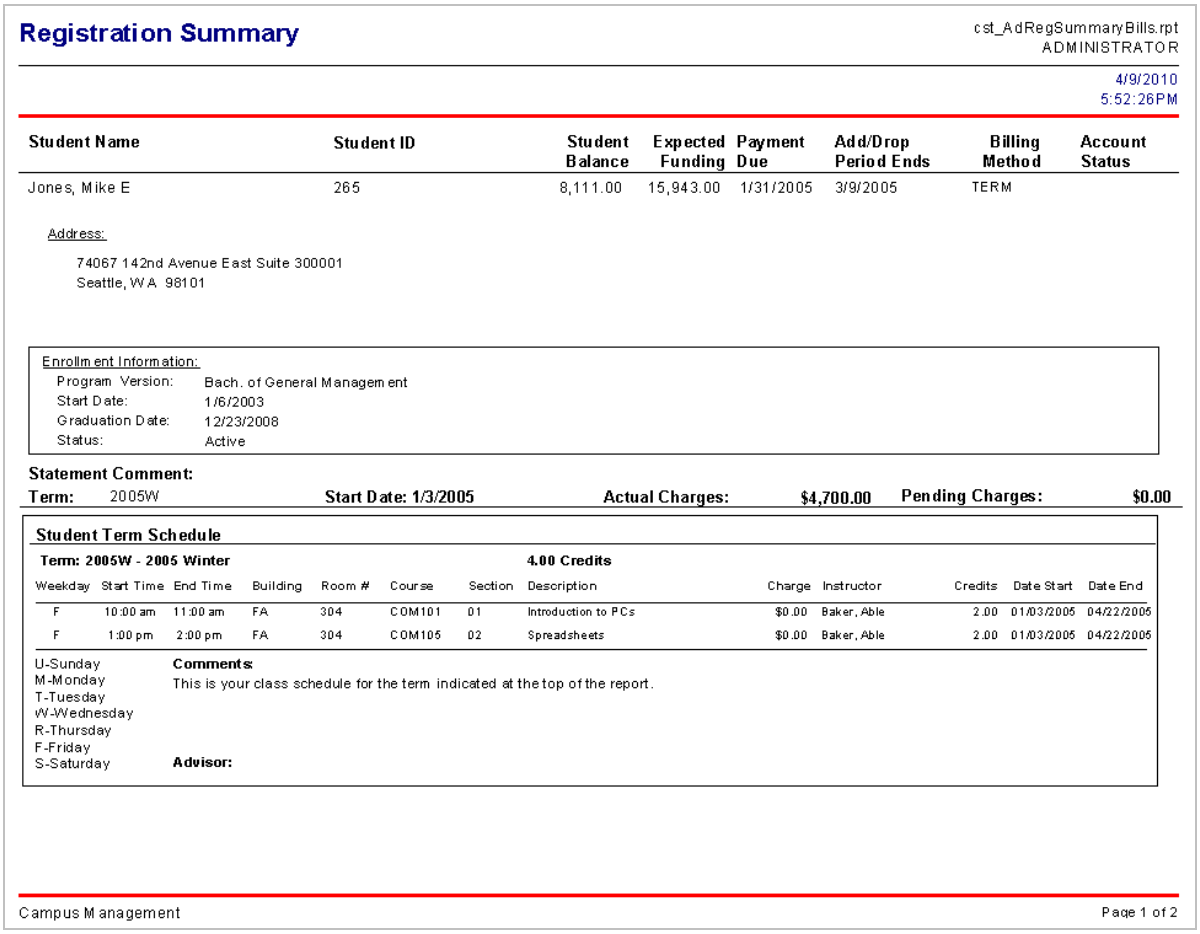


   Note: You can print a single bill for a student with connected enrollments. If the student does not have Connected Enrollments, the **Print with Connected Enrollments** check box and the **Term Group** selection option are disabled.

7. Click **Close** to close the form.

Note: For information regarding Pending Discounts and registration billing, see Ledger Cards.

Print Summary Registration Bill



Registration Summary

cst_AdRegSummaryBills.rpt
ADMINISTRATOR

4/9/2010
5:52:26PM

Student Name	Student ID	Student Balance	Expected Funding	Payment Due	Add/Drop Period Ends	Billing Method	Account Status
Jones, Mike E	265	8,111.00	15,943.00	1/31/2005	3/9/2005	TERM	

Address:

74067 142nd Avenue East Suite 300001
Seattle, WA 98101

Enrollment Information:
Program Version: Bach. of General Management
Start Date: 1/6/2003
Graduation Date: 12/23/2008
Status: Active

Statement Comment:

Term: 2005W **Start Date: 1/3/2005** **Actual Charges:** **$4,700.00** **Pending Charges:** **$0.00**

Student Term Schedule

Term: 2005W - 2005 Winter **4.00 Credits**

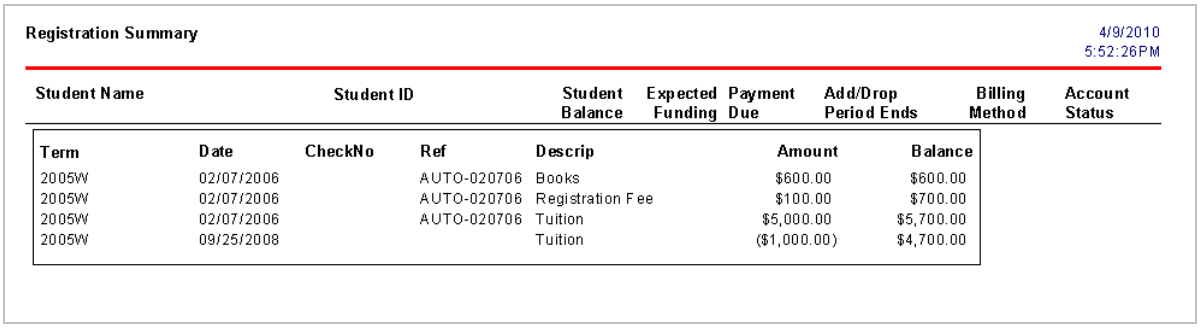
Weekday	Start Time	End Time	Building	Room #	Course	Section	Description	Charge	Instructor	Credits	Date Start	Date End
F	10:00 am	11:00 am	FA	304	COM101	01	Introduction to PCs	$0.00	Baker, Able	2.00	01/03/2005	04/22/2005
F	1:00 pm	2:00 pm	FA	304	COM105	02	Spreadsheets	$0.00	Baker, Able	2.00	01/03/2005	04/22/2005

U-Sunday
M-Monday
T-Tuesday
W-Wednesday
R-Thursday
F-Friday
S-Saturday

Comments:
This is your class schedule for the term indicated at the top of the report.

Advisor:

Campus Management Page 1 of 2



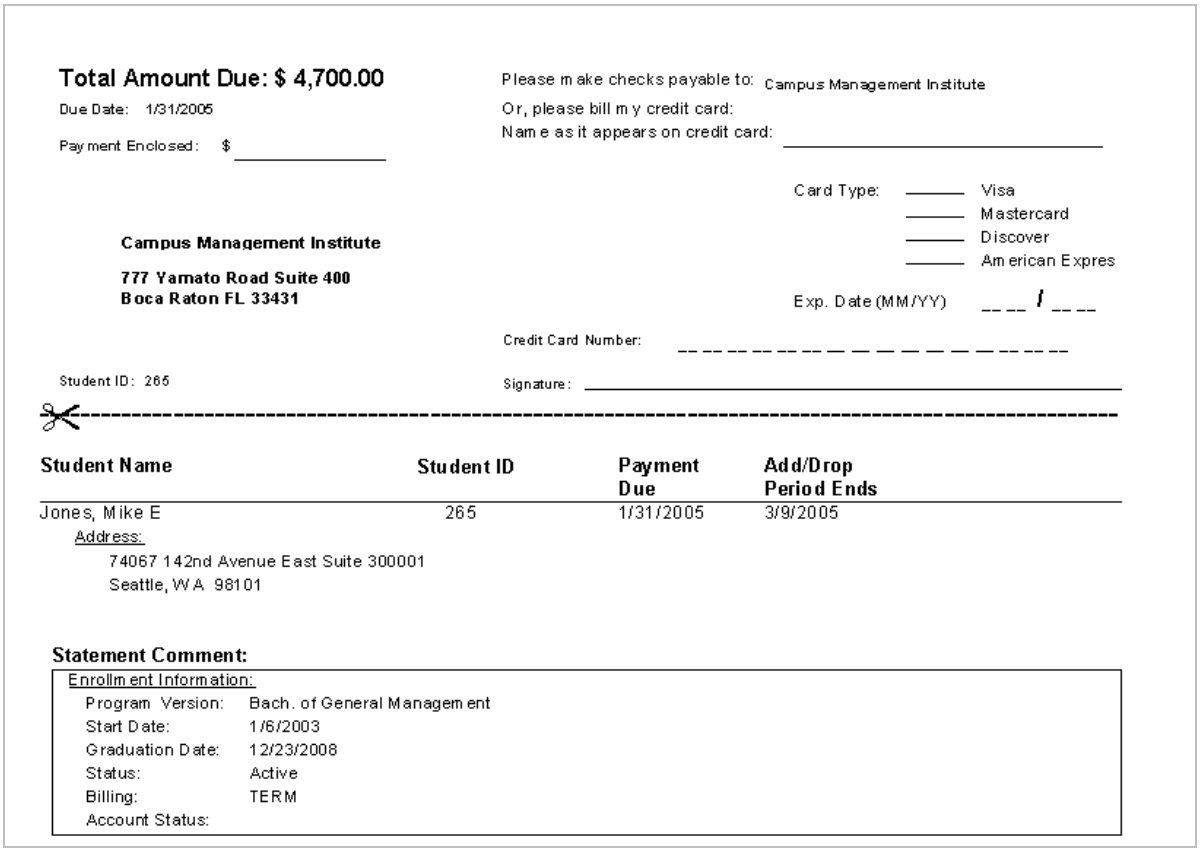
Registration Summary

4/9/2010
5:52:26PM

Student Name	Student ID	Student Balance	Expected Funding	Payment Due	Add/Drop Period Ends	Billing Method	Account Status

Term	Date	CheckNo	Ref	Descrip	Amount	Balance
2005W	02/07/2006		AUTO-020706	Books	$600.00	$600.00
2005W	02/07/2006		AUTO-020706	Registration Fee	$100.00	$700.00
2005W	02/07/2006		AUTO-020706	Tuition	$5,000.00	$5,700.00
2005W	09/25/2008			Tuition	($1,000.00)	$4,700.00

Print Detail Registration Bill



Total Amount Due: $ 4,700.00

Due Date: 1/31/2005

Payment Enclosed: $ _____

Please make checks payable to: Campus Management Institute

Or, please bill my credit card:

Name as it appears on credit card: _____

Card Type: _____ Visa
_____ Mastercard
_____ Discover
_____ American Expres

Exp. Date (MM/YY) __ __ / __ __

Credit Card Number: __ __ __ __ __ __ __ __ __ __ __ __ __ __ __ __

Signature: _____

Campus Management Institute

777 Yamato Road Suite 400
Boca Raton FL 33431

Student ID: 265

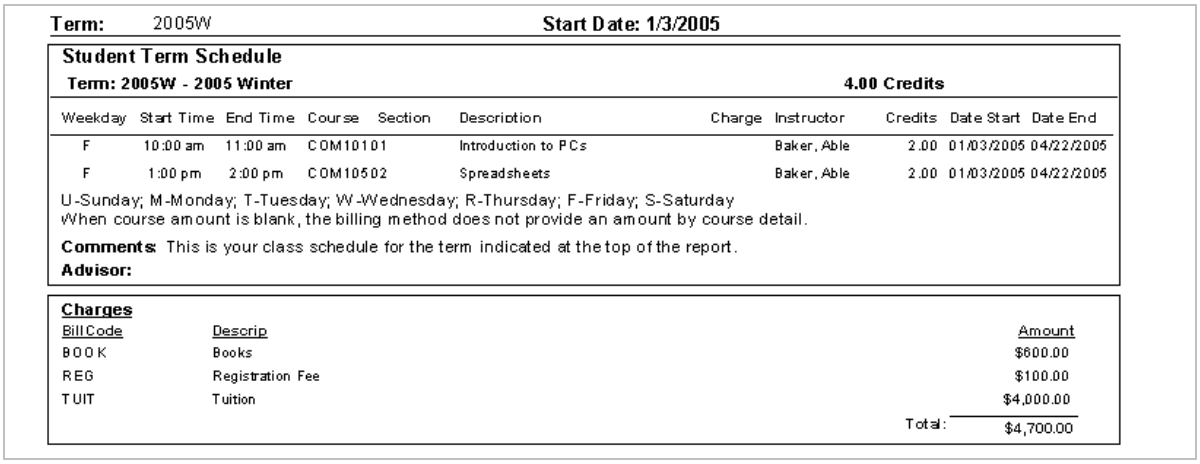
Student Name	Student ID	Payment Due	Add/Drop Period Ends
Jones, Mike E	265	1/31/2005	3/9/2005

Address:
74067 142nd Avenue East Suite 300001
Seattle, WA 98101

Statement Comment:

Enrollment Information:

Program Version:	Bach. of General Management
Start Date:	1/6/2003
Graduation Date:	12/23/2008
Status:	Active
Billing:	TERM
Account Status:	



Term: 2005W **Start Date: 1/3/2005**

Student Term Schedule

Term: 2005W - 2005 Winter **4.00 Credits**

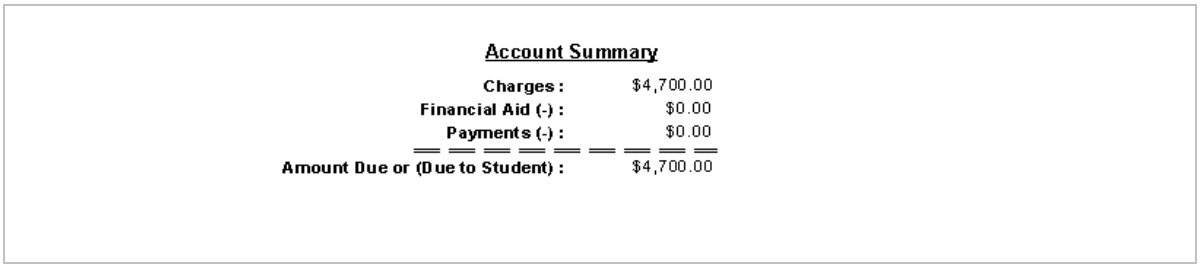
Weekday	Start Time	End Time	Course	Section	Description	Charge	Instructor	Credits	Date Start	Date End
F	10:00 am	11:00 am	COM10101		Introduction to PCs		Baker, Able	2.00	01/03/2005	04/22/2005
F	1:00 pm	2:00 pm	COM10502		Spreadsheets		Baker, Able	2.00	01/03/2005	04/22/2005

U-Sunday; M-Monday; T-Tuesday; W-Wednesday; R-Thursday; F-Friday; S-Saturday
When course amount is blank, the billing method does not provide an amount by course detail.

Comments: This is your class schedule for the term indicated at the top of the report.
Advisor:

Charges

Bill Code	Descrip	Amount
BOOK	Books	$600.00
REG	Registration Fee	$100.00
TUIT	Tuition	$4,000.00
	Total:	$4,700.00

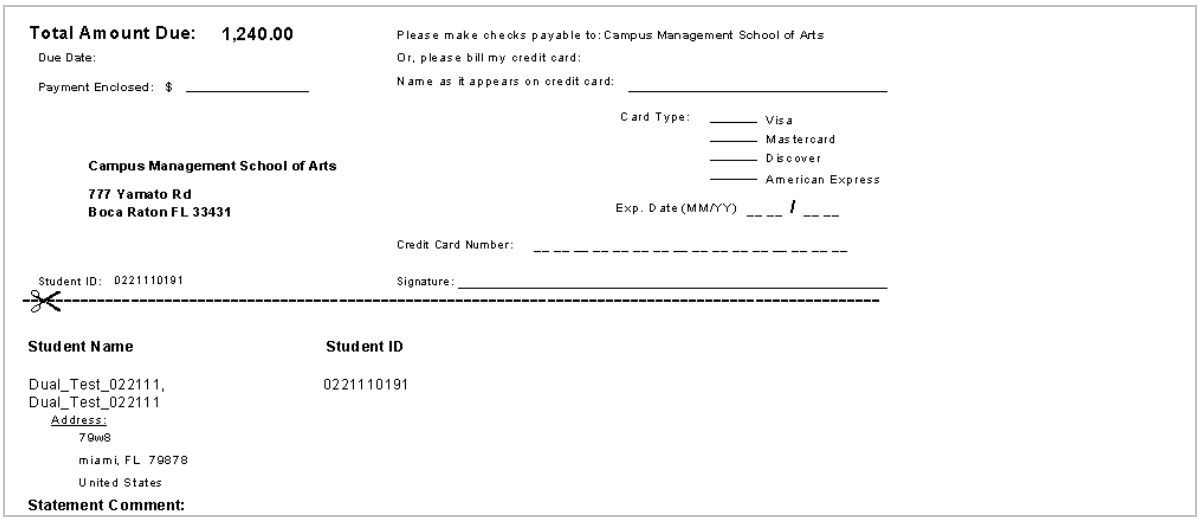


Account Summary

Charges :	$4,700.00
Financial Aid (-) :	$0.00
Payments (-) :	$0.00
Amount Due or (Due to Student) :	$4,700.00

Connected Enrollment Reports

Detail Connected Enrollment Registration Bill



Total Amount Due: 1,240.00

Due Date:

Payment Enclosed: $ _____

Please make checks payable to: Campus Management School of Arts

Or, please bill my credit card:

Name as it appears on credit card: _____

Card Type: _____ Visa
_____ Mastercard
_____ Discover
_____ American Express

Exp. Date (MM/YY) __ __ / __ __

Credit Card Number: __ __ __ __ __ __ __ __ __ __ __ __ __ __ __ __

Signature: _____

Campus Management School of Arts

777 Yamato Rd
Boca Raton FL 33431

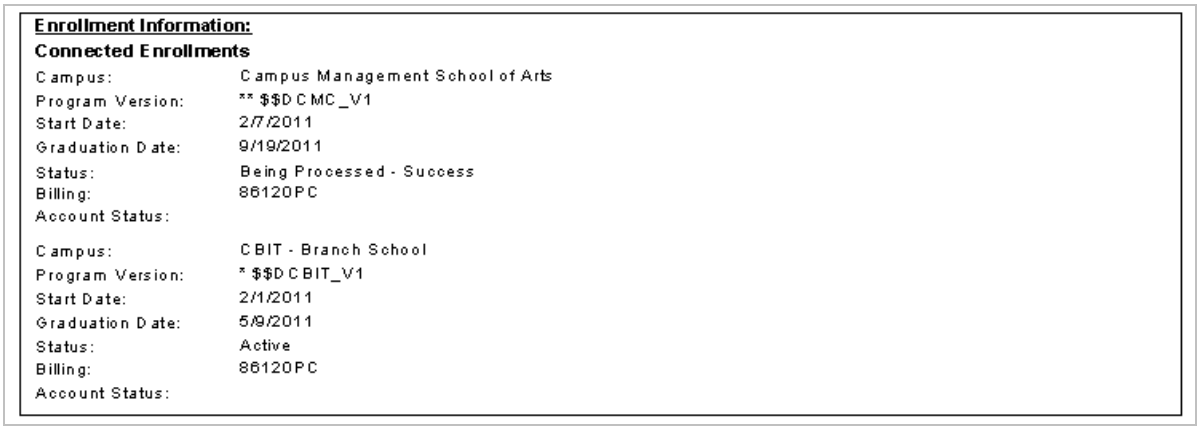
Student ID: 0221110191

Student Name **Student ID**

Dual_Test_022111, Dual_Test_022111 0221110191

Address:
79w8
miami, FL 79878
United States

Statement Comment:



Enrollment Information:

Connected Enrollments

Campus:	Campus Management School of Arts
Program Version:	** $$DCMC_V1
Start Date:	2/7/2011
Graduation Date:	9/19/2011
Status:	Being Processed - Success
Billing:	86120PC
Account Status:	
Campus:	CBIT - Branch School
Program Version:	* $$DCBIT_V1
Start Date:	2/1/2011
Graduation Date:	5/9/2011
Status:	Active
Billing:	86120PC
Account Status:	

Student Term Schedule

$$DCBIT_V1

Term: $$DUAL_CB - $$DUAL_CBIT **4.00 Credits**

Weekday	Start Time	End Time	Course/Section	Description	Charge	Instructor	Credits	Date Start	Date End
T	11:00AM	11:45AM	$$DUAL103_CB/	$$DUAL103_CB		STARSTAFF, STARSTAFF	4.00	2/1/2011	5/31/2011

$$DCMC_V1

Term: $$DUAL_CM - $$DUAL_CMC **8.00 Credits**

Weekday	Start Time	End Time	Course/Section	Description	Charge	Instructor	Credits	Date Start	Date End
R	2:55PM	3:40PM	$$DUAL101/001	$$DUAL101		Staff, Student	4.00	1/1/2011	3/25/2011
W	2:55PM	3:40PM	$$DUAL101/001	$$DUAL101		Staff, Student	4.00	1/1/2011	3/25/2011

U-Sunday; M-Monday; T-Tuesday; W-Wednesday; R-Thursday; F-Friday; S-Saturday
When course amount is blank, the billing method does not provide an amount by course detail.

Comments:

Advisor:

Charges and Discounts

Bill Code	Descrip	Term	Amount	Status
TUIT	Tuition	DUAL_SA	$600.00	Posted
ACT FEE	Activity Fee	DUAL_SA	$90.00	Pending
TUIT	Tuition	DUAL_SA	$600.00	Pending
		Total Posted :	$600.00	
		Total Pending :	$690.00	

Financial Aid

Date Sched	Fund Source	Status	Term / Payment Period
			Total :

Payments

Date	Descrip	Term/Payment Period	Amount
2/21/2011 12:00:00A	Student Payment test	DUAL_SA	$50.00
		Total :	$50.00

Account Summary

Post Charges :	$600.00
Pending Charges and Discounts :	$690.00
Financial Aid (-) :	$0.00
Payments (-) :	$50.00
Amount Due or (Due to Student) :	$1,240.00

Subsidiary Ledger:

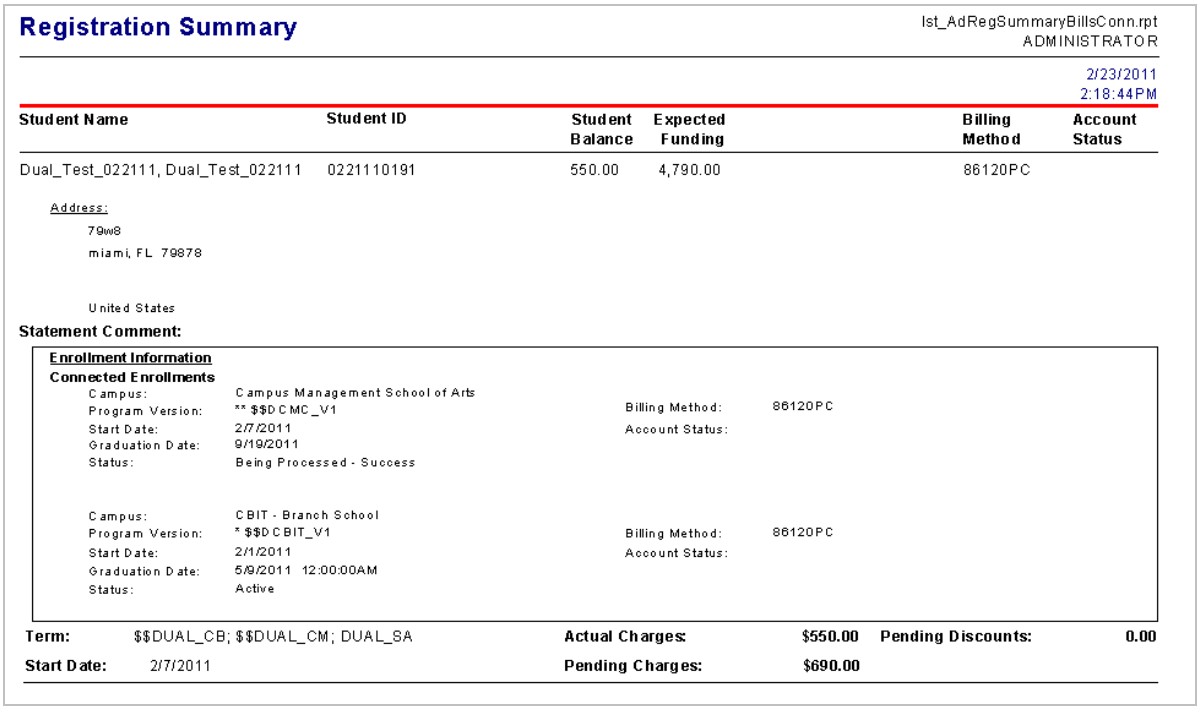
Subsidiary: Housing **Program:** $$DCMC_V1 **Maint. Balance:** ($1,000.00)

Date	Check/Ref	Enrollment / Bill Code	A/Y Cash Drawer	Term / Description	Campus	Charges	Payments	Balance
2/21/2011	123/	DU11020096	A0314 DRAWER1211		CMC Student Payment test	$0.00	$50.00	($50.00)
				Enrollment Totals:		**$0.00**	**$50.00**	**$(50.00)**

Subsidiary: Housing **Program:** $$DCBIT_V1 **Maint. Balance:** ($500.00)

Date	Check/Ref	Enrollment / Bill Code	A/Y Cash Drawer	Term / Description	Campus	Charges	Payments	Balance
2/21/2011	123/	DU11020099	A0314 DRAWER1211		CBIT Student Payment test	$0.00	$10.00	($10.00)
				Enrollment Totals:		**$0.00**	**$10.00**	**$(10.00)**

Summary Connected Enrollment Registration Bill



Registration Summary

lst_AdRegSummaryBillsConn.rpt
ADMINISTRATOR

2/23/2011
2:18:44PM

Student Name	Student ID	Student Balance	Expected Funding	Billing Method	Account Status
Dual_Test_022111, Dual_Test_022111	0221110191	550.00	4,790.00	86120PC	

Address:
79w8
miami, FL 79878

United States

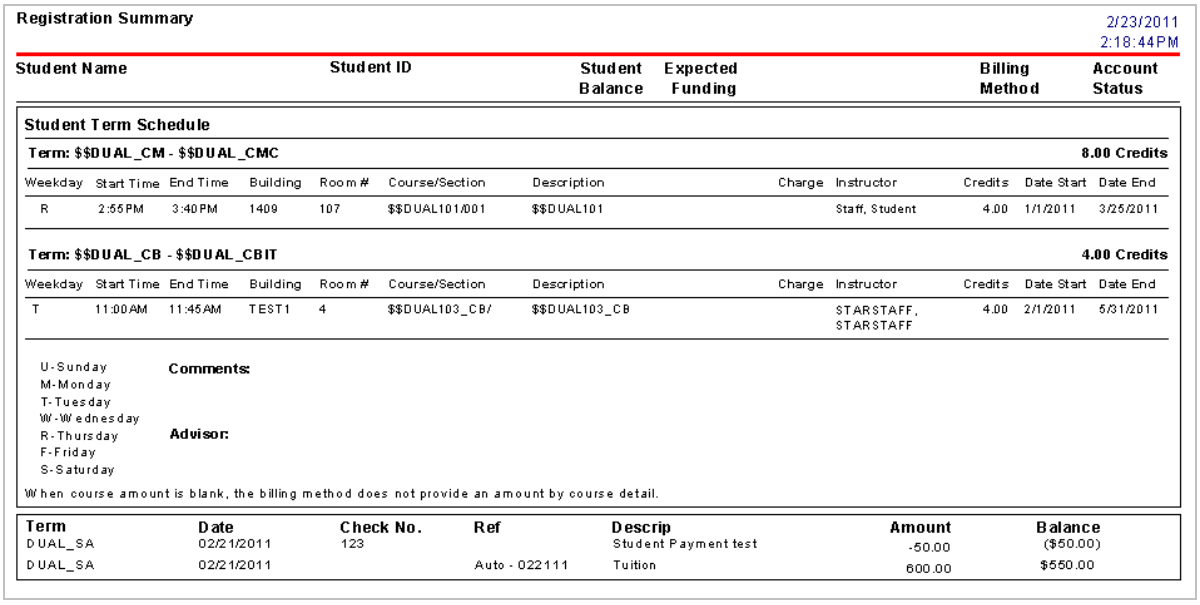
Statement Comment:

Enrollment Information
Connected Enrollments

Campus: Campus Management School of Arts
Program Version: ** $$DCMC_V1 — Billing Method: 86120PC
Start Date: 2/7/2011 — Account Status:
Graduation Date: 9/19/2011
Status: Being Processed - Success

Campus: CBIT - Branch School
Program Version: * $$DCBIT_V1 — Billing Method: 86120PC
Start Date: 2/1/2011 — Account Status:
Graduation Date: 5/9/2011 12:00:00AM
Status: Active

Term: $$DUAL_CB; $$DUAL_CM; DUAL_SA — **Actual Charges:** $550.00 — **Pending Discounts:** 0.00
Start Date: 2/7/2011 — **Pending Charges:** $690.00



Registration Summary

2/23/2011
2:18:44PM

Student Name	Student ID	Student Balance	Expected Funding	Billing Method	Account Status

Student Term Schedule

Term: $$DUAL_CM - $$DUAL_CMC — **8.00 Credits**

Weekday	Start Time	End Time	Building	Room #	Course/Section	Description	Charge	Instructor	Credits	Date Start	Date End
R	2:55PM	3:40PM	1409	107	$$DUAL101/001	$$DUAL101		Staff, Student	4.00	1/1/2011	3/25/2011

Term: $$DUAL_CB - $$DUAL_CBIT — **4.00 Credits**

Weekday	Start Time	End Time	Building	Room #	Course/Section	Description	Charge	Instructor	Credits	Date Start	Date End
T	11:00AM	11:45AM	TEST1	4	$$DUAL103_CB/	$$DUAL103_CB		STARSTAFF, STARSTAFF	4.00	2/1/2011	5/31/2011

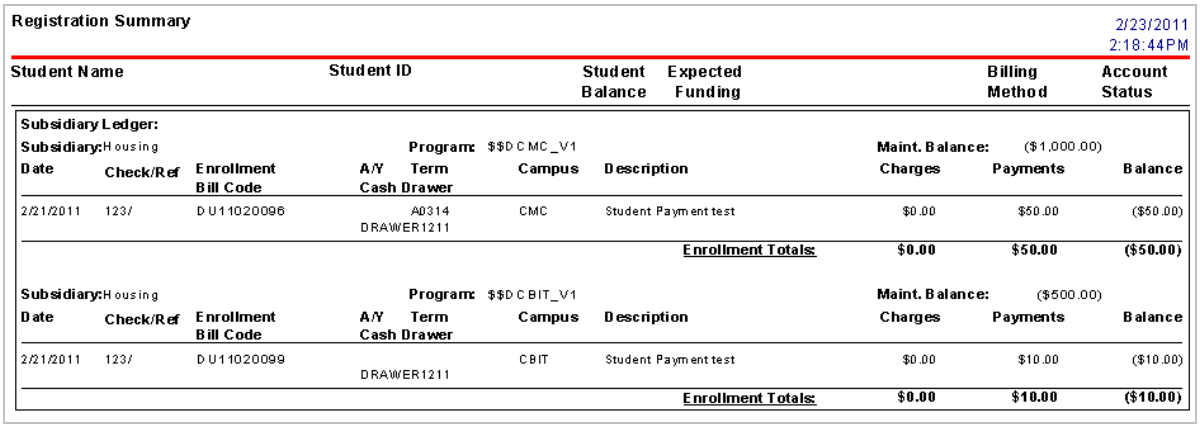
U-Sunday
M-Monday
T-Tuesday
W-Wednesday
R-Thursday
F-Friday
S-Saturday

Comments:

Advisor:

When course amount is blank, the billing method does not provide an amount by course detail.

Term	Date	Check No.	Ref	Descrip	Amount	Balance
DUAL_SA	02/21/2011	123		Student Payment test	-50.00	($50.00)
DUAL_SA	02/21/2011		Auto - 022111	Tuition	600.00	$550.00



Registration Summary 2/23/2011 2:18:44PM

Student Name	Student ID	Student Balance	Expected Funding	Billing Method	Account Status

Subsidiary Ledger:

Subsidiary: Housing **Program:** $$DCMC_V1 **Maint. Balance:** ($1,000.00)

Date	Check/Ref	Enrollment Bill Code	A/Y Cash Drawer	Term	Campus	Description	Charges	Payments	Balance
2/21/2011	123/	DU11020096	DRAWER1211	A0314	CMC	Student Payment test	$0.00	$50.00	($50.00)
						Enrollment Totals:	**$0.00**	**$50.00**	**($50.00)**

Subsidiary: Housing **Program:** $$DCBIT_V1 **Maint. Balance:** ($500.00)

Date	Check/Ref	Enrollment Bill Code	A/Y Cash Drawer	Term	Campus	Description	Charges	Payments	Balance
2/21/2011	123/	DU11020099	DRAWER1211		CBIT	Student Payment test	$0.00	$10.00	($10.00)
						Enrollment Totals:	**$0.00**	**$10.00**	**($10.00)**

View > Academic Records

Functions related to academic matters such as enrollment, class scheduling, attendance, grading, degree audit, fees, and school-defined fields are handled via this menu. The options on this menu apply to the student selected from the Recent Students list.

Menu Item	Description
Student	Displays the Student Master form.
Enrollment	Displays data related to the student's enrollment records.
Summary	Displays a summary report of the student's enrollments.
Schedule	Displays the student's scheduled courses and class sections. You can view and maintain the student's schedule.
Attendance	Displays the form used to view or post attendance for the student.
Lessons	Displays the form used to view or enter course lesson data for the student.
Final Grades	Displays the form used to view or post final grades for the student (obsolete).
Degree Progress Audit	Displays the Degree Progress Audit report. You can enter transfer credits via this option.
Audit	Displays changes to posted grade information for lessons and final grades and identifies what was changed, when it was changed, and who made the change.
Fees	Displays the form used to view and edit fees related to the student's enrollments.
Degrees, Honors and Comments	Displays the form used to view and edit degrees awarded by your institution to the student.
School Fields	Displays the form used to view or enter data in school-defined fields related to the Academic Records module and public fields from other modules.
Transfer Credits	Displays the list of courses transferred from other colleges. You can modify transfer credit information. The same forms is displayed when you select Transfer Credits under View > Admissions.
Placement Info	Displays the form used to view and edit placement data for each student enrollment.
Registration Locks	Displays the form used to associate a registration lock with a student or student group.
Additional GPAs	Displays all your additional, non-system GPAs.
Payment Period Summary	Displays Payment Period summary results for students that are evaluated through SAP based on a completed payment period. For an overview, see Payment Period Locking and the Completed Flag.

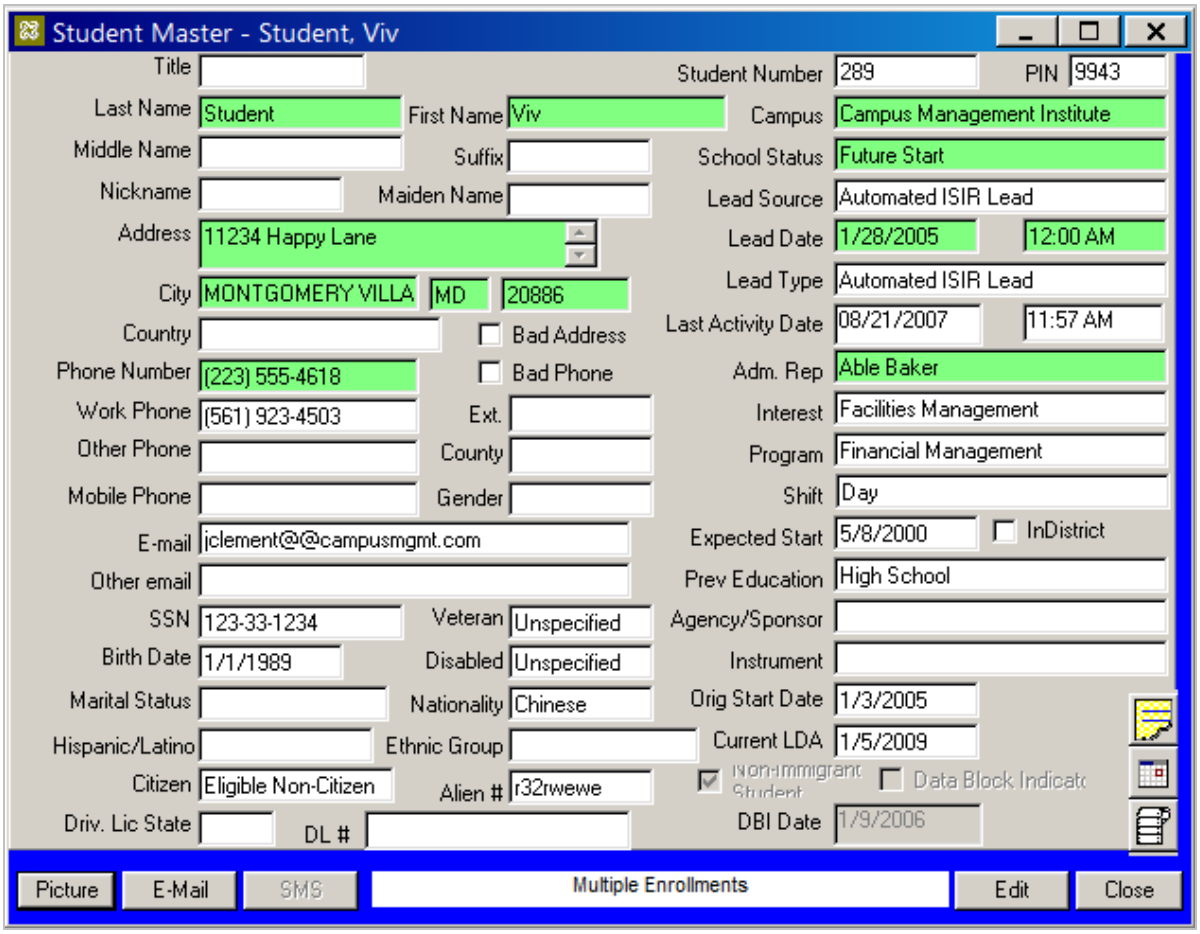
The options on the Student Bar are the same as the options on the View menu, unless the Student Bar has been altered by the user.

Student Master

The Student Master form contains much of a student's basic demographic information. The Student Master form is usually (but not necessarily) populated in the Admissions module by adding a new lead to the database. New leads are entered using the Quick Lead Entry form or the Add New Lead **Ctrl+L** option on the File menu. The **Ctrl+N** key combination can also be used to start a new Student Master record (form) without entering a quick lead.

To view a Student Master form:

1. Select one of the following options:
    - Click **Student** on the Student Bar.
    - Double-click **Recent Students** on the Toolbar. When you change the student in the Recent Students list, a new Student Master form is displayed. If you already have a Student Master form open, it remains open in the background.
    - From the **View** menu navigate as follows:
        - Contact Manager > Student
        - Admissions > Student
        - Financial Aid > Student
        - Student Accounts > Student
        - Academic Records > Student
        - Career Services > Student
        - Loan Management > Student
        - Student Services > Student
        - Housing > Student
    - Use the **Find** menu or click on the Toolbar to search for a student.



Note: The border color around the Student Master form indicates the student's status category. In the setup options under Setup > Status Codes > Colors Tab, your system administrator can choose colors for the status categories.

2. Multiple Student Master forms can be displayed at the same time. The forms always open in the same place in the work area. Unless you have closed, moved, or minimized a previous Student Master form, the next form you open covers the previous form.

   To move between open Student Master forms use the **Window** menu and select **Tile** or **Cascade** to organize all open forms in the work area.

   When you are working with multiple students, ensure that the correct form is current (active). The name of the current student is always shown in the Recent Students text box. The title bar of the active form is always a different color than other forms which may be open in your work area.

3. To edit the information on the form, click **Edit**. See Edit a Student Master.

   Required fields on the form have a background color other than white. If a required field is blank, you must enter data in it when you edit the form, even if you did not intend to provide the information when you clicked Edit.

   Some fields are required by CampusNexus Student (Last Name, First Name, Lead Date, Admissions Rep). Additionally, your institution may designate other fields as required. The system administrator can mark fields as required in either of two ways.

- Open any Student Master (or Quick Lead) form and go to Setup > Required Fields.
- Designate the field as required in the Data Dictionary.

4. To add an activity from the Student Master form, click the **Add Activity** icon at the bottom right of the form. The Activity form is displayed.
5. Click **Close** (Ctrl+F4) to close the active Student Master form. If you are in edit mode when you click Close, you are prompted to save any changes.

Duplicate Student Records

CampusNexus Student checks for duplicate Student Master records when new leads or students are added. The following table columns are used to check for duplicates:

- Student ID
- Social Security Number
- Phone Number
- Date of Birth and Student Name (combined)
- Driver's License Number
- E-mail address.

Each check is performed only if you entered data in the corresponding field. If at least one match is found, a grid showing the matches is displayed

If the lead is a duplicate and can be found on the grid, click the record and the lead form is populated with the information for that lead. The information can then be edited. The campus for the lead can be changed only if the campus ID for the record from the grid is in the list of campuses to which you have access.

Enrollment

CampusNexus Student maintains a lot of data with respect to a student's enrollment records. A student can have multiple active enrollments (for instance, double majors). By default the current enrollment is displayed when accessing the Enrollment form.

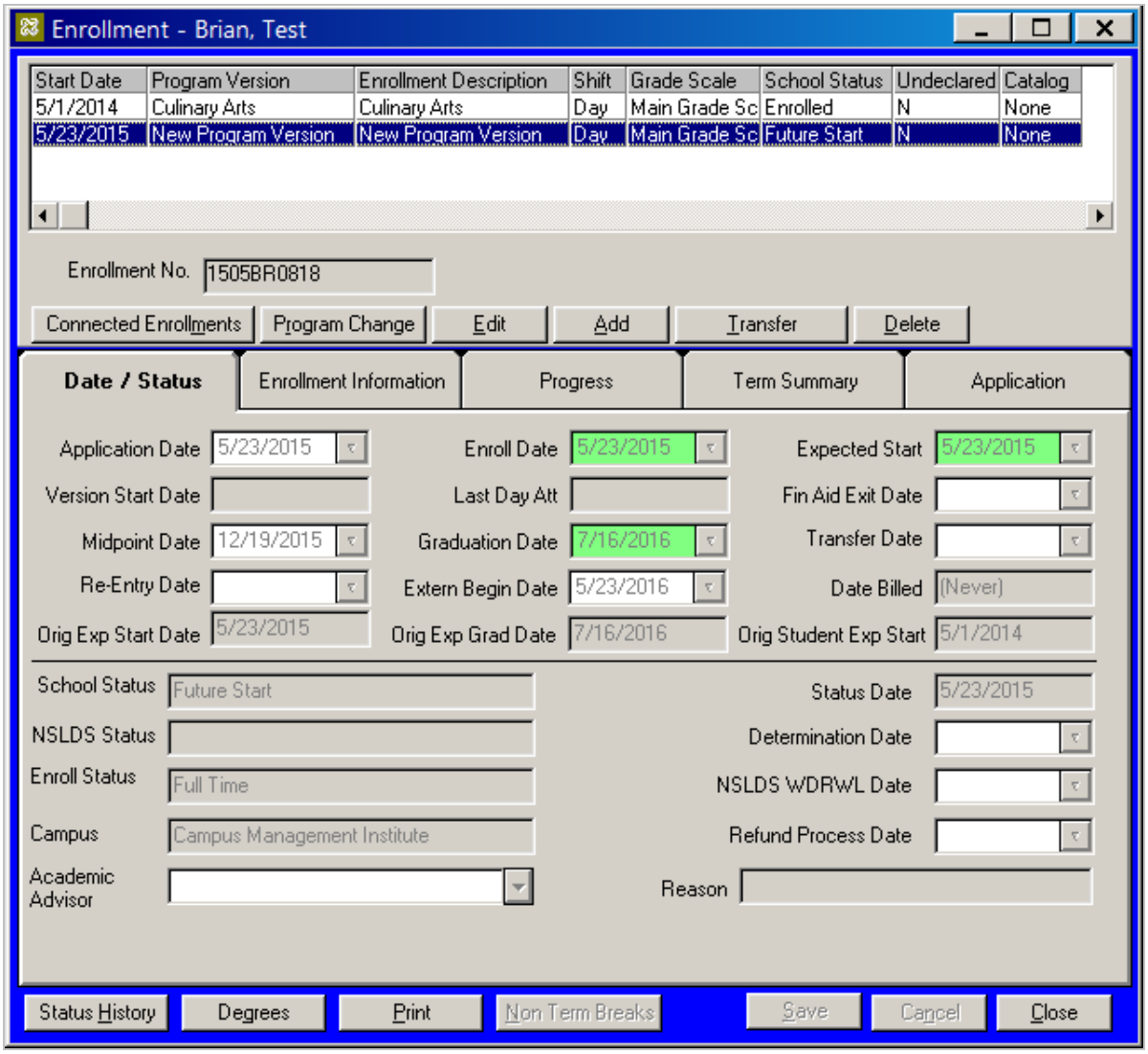
A student enrollment is normally initiated in the Admissions department after the processing of new leads. For more information, see Enrolling a Student. The Admissions department passes the enrolled student to the Academic Records department.

To work with enrollment records:

1. Select a student.
2. Navigate to **View > Academic Records > Enrollment**. The Enrollment form is displayed. CampusNexus Student lists all of the student's enrollments and fills in the form with data from the first enrollment. By default the student's current enrollment is displayed.

   The Enrollment form contains the following tabs:

   - Date / Status
   - Enrollment Information
   - Progress
   - Term Summary
   - Application



You can perform the following actions from the Enrollment form:

- Add, edit, and delete an enrollment.
- Set up connected enrollments.
- Transfer a student's enrollment information to a new enrollment.
- Perform a program change.
- Check on a student's Admissions and Enrollment Status Change History.
- Print a Degree Audit Report.

System administrators and users with the appropriate permissions can configure field level security when the form is active.

Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

To add an enrollment:

1. Click **Add** on the Enrollment form. The Enrollment wizard is displayed. Complete the forms in the wizard to record a new enrollment.

   Note: When enrolling a student in a new program and the "Use Terms for Academic Year date" flag is enabled, CampusNexus Student checks if a term sequence (Lists > Academic Records > Program > Versions > Start Dates > Assign Term Sequence) exists for the student.

   If a term sequence exists, CampusNexus Student uses that term sequence to calculate the academic year start/end dates, otherwise CampusNexus Student looks for the Financial Aid Term associated with the student campus with the start date closest to the enrollment start date.

   CampusNexus Student then finds the term with a date greater than the end date of the term defined above but closest to that date and considers it to be the next term that is part of the academic year and repeats these steps until the number of terms in the academic year is reached.

   Subsequent academic years follow the same steps.

   If not all terms for an academic year are found, CampusNexus Student uses the 'weeks in academic year' value to calculate the end date of the academic year. A field is provided to enter the number of transfer credits to be used in the calculation of the terms in academic year.

   Note: For students who have connected enrollments, you can view the aggregated enrollment status at the term level and the enrollment level from the enrollment form.

2. When the enrollment is completed in the Enrollment wizard, you are returned to the Enrollment form.

Connected Enrollments

For students who are seeking dual degrees, Connect Enrollments provide the ability to connect enrollments from a list of non-permanent out enrollments (active/future enrollments) and set a default among the connected enrollments.

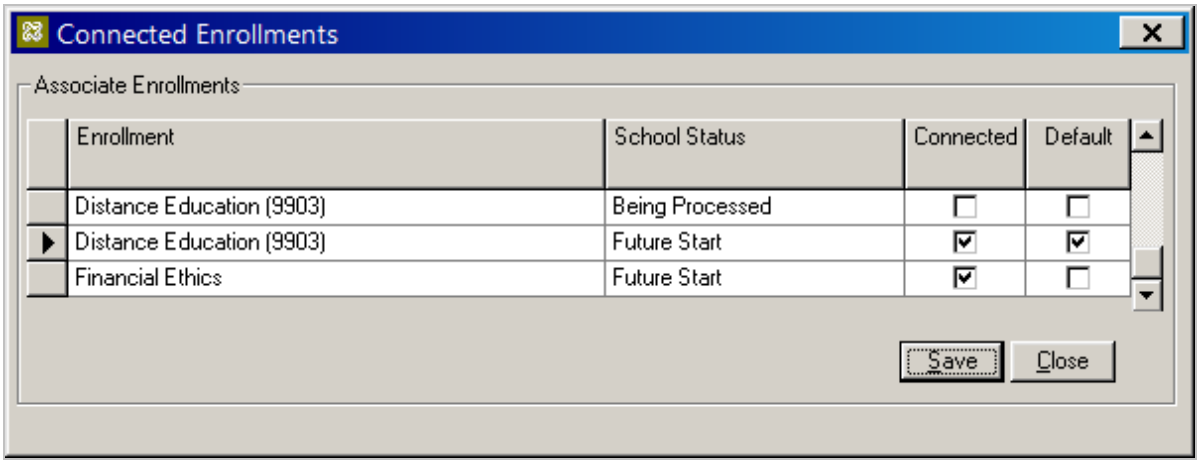
You must have permissions to access this option. If you do not have permissions to connect enrollments, the Connected Enrollments button is not displayed. For more information about setting up permissions to use this option, see Setup > Staff > Staff Members > User Info Tab > User Info Academic Records sub-tab).

Connected Enrollments provide the ability to:

- Create a connected enrollment relationship by connecting two enrollments. Connecting enrollments should be limited to campuses that share the same OPEID, Pell Reporting Entity ID, and DL Reporting Entity ID.
- Charge tuition to the individual enrollment where courses are taken so that revenue is assigned to the correct business unit when connected enrollments exist.
- Store connected enrollment history in the database that can be used in custom reports.
- Define a default enrollment for the two connected enrollments.
- Eliminate double billing of fees (charge fee by student versus enrollment).
- Prepare a Detail Registration Bill (in batch) for connected enrollments.
- Prepare a Summary Registration Bill (in batch and from Student Ledger Card) for connected enrollments.
- Process a student-based transcript by degree level for connected enrollments.
- Report unduplicated counts of connected enrollments for IPEDS 12-Month Unduplicated Count report.
- See aggregated enrollment status on the Term Summary for connected enrollments that share terms.

To set up connected enrollments:

1. Click **Connected Enrollments** on the Enrollment form. The Connected Enrollment form is displayed.



2. Select the **Connected** column of the two enrollments that you want to connect.
3. Select the **Default** column of the enrollment you want to set as the default enrollment.

   If you do not select a default enrollment, the following message is displayed when you click Save: *"One of the selected enrollments must be specified as the default enrollment."*
4. Click **Save**.
5. Click **OK** on the confirmation message to return to the Enrollment form.

To perform a Program Change:

If a student's enrollment is in cancelled status, the Program Change button is displayed. This button will not be visible unless the Enrollment is eligible to be changed.

1. Click **Program Change** on the Enrollment form. The Program Change Wizard is displayed. The wizard allows enrollment changes to be made including changes to a student's Program, Program Version, Start Date, or Shift.
2. After you complete the forms in the wizard, you are returned to the Enrollment form.

Term Groups and Enrollment Status

The enrollment statuses at both the enrollment and term levels are calculated based on term groups when appropriate. These enrollment statuses are displayed on the Date/Status tab and Term Summary tab of the Enrollment folder. The Term Summary also provides a way to view which terms were involved in a particular enrollment status calculation. See Term Groups for further information. In the case of connected enrollments, the enrollment status is calculated using the enrollment status configuration on the default environment.

Note: Institutions that do not configure term groups will not have their enrollment statuses affected in any way.

To edit an enrollment:

1. In the Enrollment form, select the enrollment to be edited.

   Note the **Enrollment Number** under the list of enrollments. This is the student's unique identification number for the highlighted enrollment. All records for this enrollment will be related by this number.
2. Click **Edit**. The fields on the form that you can edit appear with white backgrounds. Fields that are dimmed are

maintained elsewhere and cannot be edited here.

Note: Use the hotspots on the form to navigate to information about specific tabs or buttons.

3. Enter new data or change existing data on the form.

   The Start Date Change wizard is invoked if you change the Expected Start Date for a student with a school-defined Status of Enrolled. If the student's Status is Active, the Academic Year and Payment Periods are updated through the Student Pace Evaluation tool.

4. Click **Save**.

To delete an enrollment:

To delete an enrollment, the following conditions must be met.

a. All courses on the student's course list must be set to Future (no attendance recorded).
b. The student's ledger card must show no transactions related to the enrollment to be deleted.
c. No financial aid was disbursed to the student for the enrollment to be deleted.

If the above conditions have been met, click **Delete** on the Enrollment form. You are prompted to confirm the deletion. If any of the above conditions are not met, CampusNexus Student displays an appropriate message and cancels the deletion.

Note: If you canceling a student enrollment when the enrollment has courses associated with it, a message is displayed asking if you want to delete course associations for this student.

If you answer **Yes**, CampusNexus Student deletes the course associations and the enrollment for this student. If you answer **no**, the course associations are not deleted and the student's enrollment is not cancelled.

To view Status History or Degrees

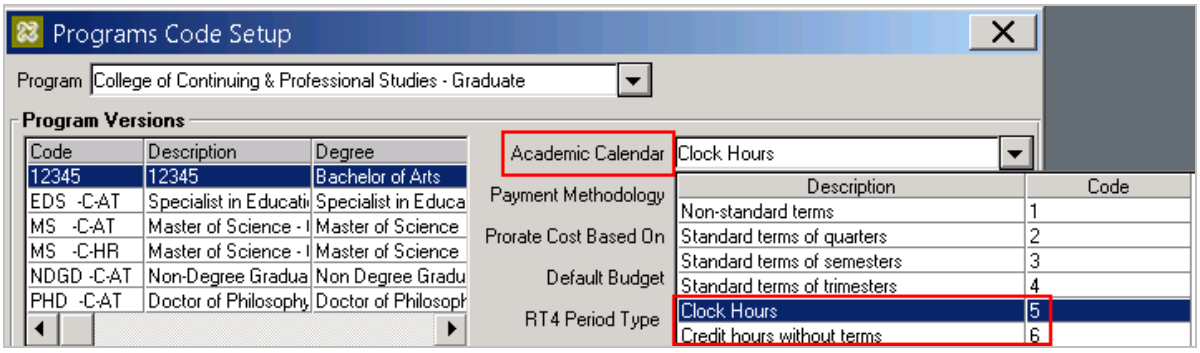
1. Click **Status History** to view or print the student's status change history. See Status History for details.
2. Click **Degrees** to display the Degrees Awarded form. This form lists any degrees already awarded to the student. It is also used to record any new degree awarded.

Adding Non-Term Breaks

Based on the regulations specified by the Department of Education (ED), CampusNexus Student considers only 45 days of a non-term break when calculating instructional weeks.

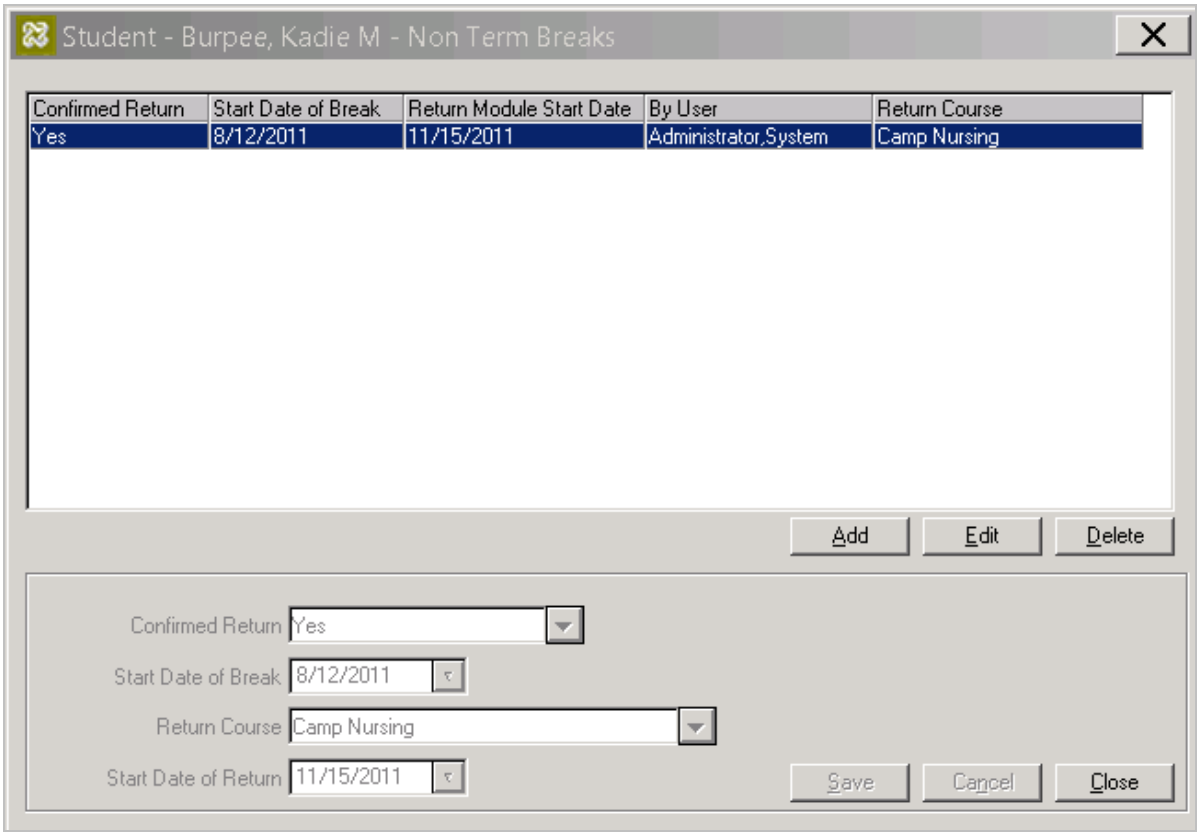
An instructional week is a seven day period containing at least one scheduled day of class.

Note: The Non Term Breaks button is enabled only if the selected enrollment is a non-term program version. To specify a program version as non-term, select Academic Calendar 5 or 6 in the Programs Code Setup form (Lists > Financial Aid > Programs (tab) > Add/Edit (button)).



To specify a non-term break:

1. Navigate to **View > Academic Records > Enrollment**. The Enrollment form is displayed.
2. Select a non-term enrollment, and click **Non Term Breaks**. The Non Term Breaks form is displayed.



3. Click **Add** to specify a new module break.
4. Click the **Confirmed Return** list to specify if the student will be returning to the course after the module break. Select **Yes** in the **Confirmed Return** list to specify that the student will be returning to the course after the break
5. Click the **Start Date of Break** list to specify the starting date of the module break.
6. Click the **Return Course** list to select the application non-term course that the student will enroll in after the module break.

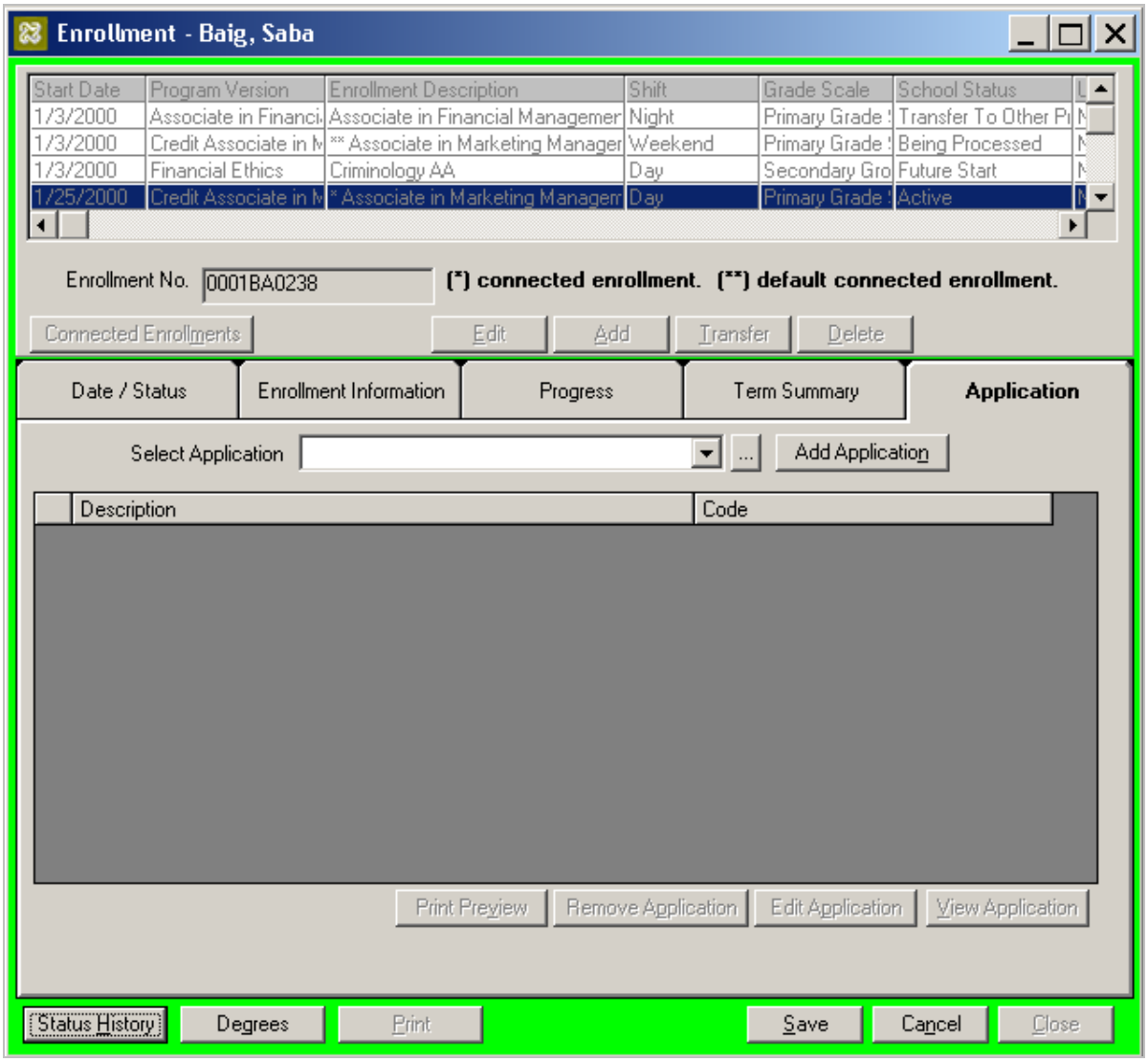
   The **Return Course** list is displayed based on the courses into which the student is registered, for which the start date of the course is greater than the date specified in the **Start Date of Break** field and less than 45 days.

   The **Start Date of Return** list is automatically populated based on the course selected. You can manually change this date if the student's return date does not coincide with the course start date.

   Note: A warning message is displayed if the date is changed to a value greater than 45 days from the Start Date of Break. CampusNexus Student uses only 45 days of the module break when calculating instructional weeks.
7. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Application Tab

1. Select the student's Program Version and click **Edit** in the top portion of the form. The available applications are enabled.



2. Select the applicable application and click **Edit Application**. See Admissions Application for application setup instructions.
3. Fill out the student's application and click **Submit**.
4. A message stating 'Application Saved' is displayed. Click **OK**. The 'Application Status' field displays a 'Complete' value.
5. Click **View Application** to view the applicant's responses to the application.
6. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Enrollment Changes

An enrollment wizard allows you to make changes to a student's expected start date, shift or program version from within the student's enrollment record. Changes to these data elements will cause recalculation of necessary information, such as length of program, financial aid academic years, midpoint and grad dates, course listings, and so on depending on the selected change. These changes include:

1. **Program Change**. If you select a student's record whose status is in an cancelled status category, the **Program Change** button is available and is displayed to the right of Enrollment ID. The button is hidden for enrollments in all other status categories. You can perform a Program Change on enrolled students. You can select from program versions offered at the campus or campus group of the enrollment being changed.
2. **Program Version Change**. A change in Program Version will perform functions similar to the original enrollment, updating all relevant tables (in other words, required course list, FA Academic Years, Fees, and so on).
3. **Start Date Change.** You can perform a start date change on students in an Enrolled status category. The option is available only when the selected enrollment is in an Enrolled status category. You can select from a list of valid start dates for the program selected if validation to a start date calendar is in use.

   A start date change will always create a change to the Academic Year start and end dates. A shift change may affect Academic Year Start and End Dates or the number of academic years. If financial aid is already on file within the academic years defined where the loan start date is earlier than the new start date, or the loan end date is earlier than the new start date, or the loan end date is later than the new Grad Date these loan records are invalid. If loans are determined to be invalid, a warning message is displayed on the screen:

   "The student's financial aid record has loans on file with dates that do not conform to the new academic year dates. The student's FA data must be reviewed. A message will be sent to the FA administrator to resolve the student's record."

   This message triggers a program change Contact Manager activity to be scheduled to the Financial Aid Administrator listed in the Campus setup form. The activity indicates that a change in start date or program version has occurred and that Financial Aid data must be reviewed. It will include the student's name so that the activity also appears in the student's Contact Manager folder.
4. **Shift Change**. You can perform a shift change on students in an Enrolled status category. The option is available only when the selected enrollment is in an Enrolled status category. You can select from available shift codes for the program.
5. A change in FA information will notify a Financial Aid user to review the file for accuracy via Contact Manager.
6. The student's status change history will reflect the change with a new and previous status equal to the student's current status and a comment indicating that a program or start date change was performed.

If you change the expected start date or shift on the Enrollment form, the program will display a message box prompting you to access the enrollment change wizard when required.

Step 1 of the Enrollment Change Wizard

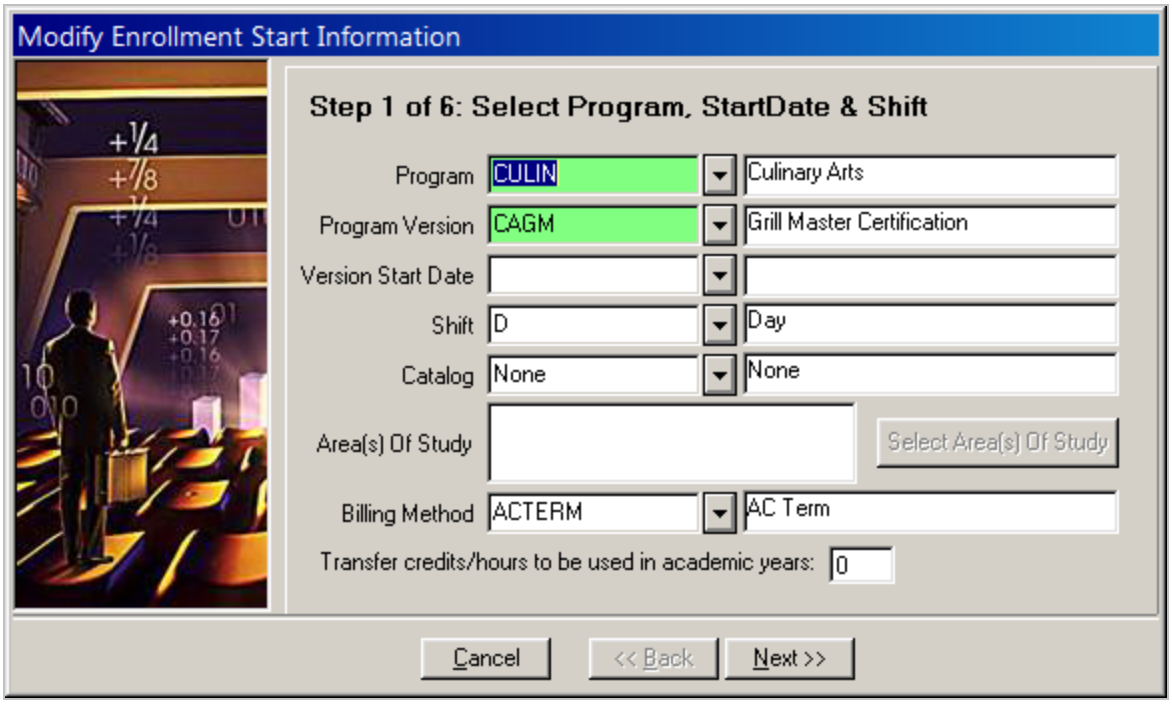
To use the Enrollment Change Wizard, a student must be selected and the Enrollment form must be displayed.

Highlight the Enrollment for which the program change is desired.

Note: The **Program Change** button will only be available if the enrollment has a status of enrolled or cancelled. The **Program Change** button will not be visible if the student has attended classes for the enrollment or the student has a Permanent Out status.

When you click the **Program Change** button, a Selection Wizard is displayed. The first step of the wizard will display start date, program version and shift. Select the change you want to perform. Nothing is changed in the student's records until you click

Finish at the end of the wizard. You can leave the student's records unchanged by clicking **Cancel** at any time before you click the **Finish** button.



Program Version Change:

If you elect to change the Program Version:

Select from a list of eligible program versions offered at the enrollment campus.

If the **Require Start Date Calendar** option is set to **Yes**, you must re-select from a list of valid start dates for the newly selected program version and shift.

If the **Require Start Date Calendar** option is set to **No**, the program displays the start date, midpoint date and grad date on file for you to edit.

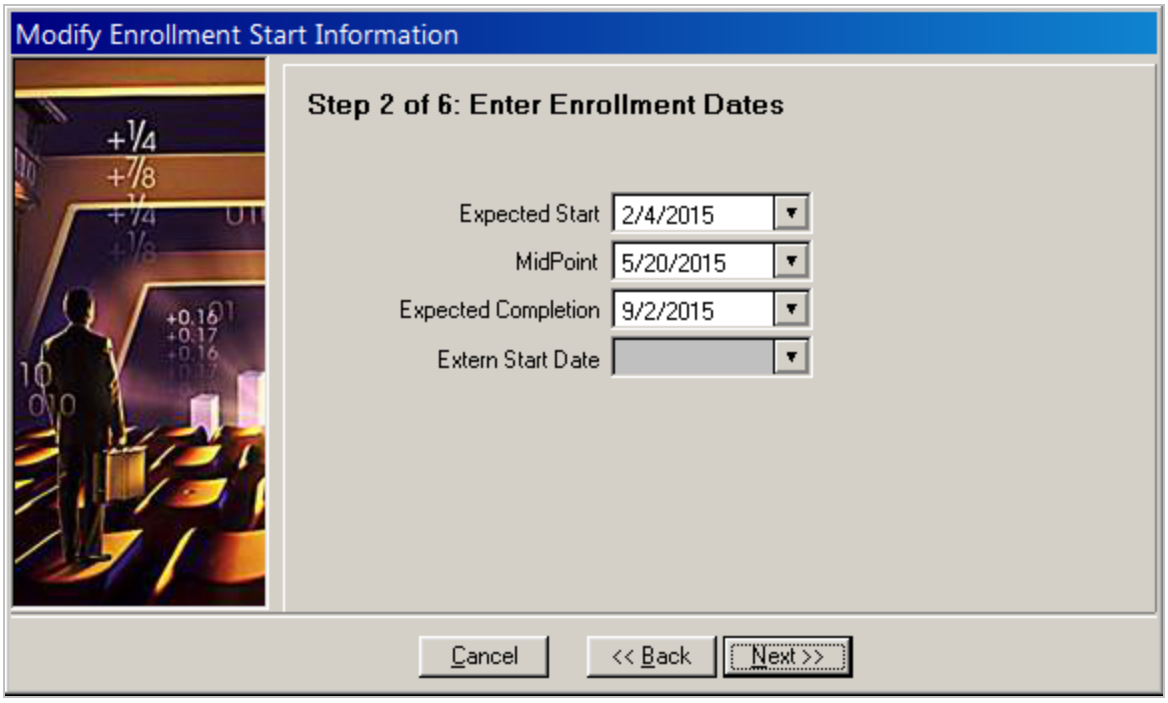
Version Start Date Change:

If you change the start date option, you will be prompted with the following selections:

Under **Setup > Academic Records**, if the **Require Start Date** option is set to **Yes**, then you have access to predefined dates set up by the school and you can see them when you click on the **Version Start Date** combo box on the wizard. Select from the start dates defined for the program version selected above.

Step 2 of the Enrollment Change Wizard

Once the start date calendar is selected, the program will populate and display the new expected start date, midpoint date, and grad date.



If the **Require Start Date** option is set to **No**, select a start term (not required). Below the start term will be the various dates (expected start, mid and grad) based on the term selected (the existing dates are used by default if no term is selected). Each date control will offer a calendar control to allow the user to modify the dates populated as a result of the start term selection. If no start term is selected, the user can manually enter dates.

Shift Change:

If you elect to change the shift, you have the following selections:

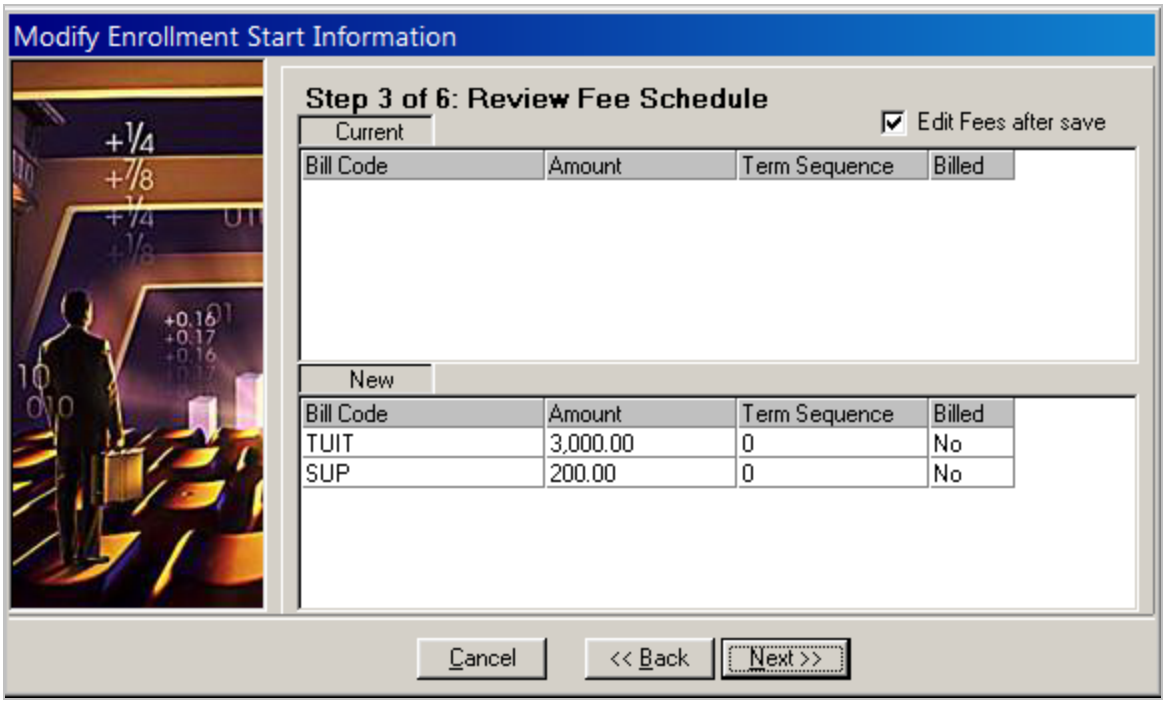
A change in shift will be similar to a change in start date.

The **Shift** drop-down displays all shifts available for the student's campus.

When a start date calendar is required (under **Setup > Academic Records**) if the **Require Start Date** option is set to **Yes**, the system will validate the new shift selection to the start date calendar. If a record is not on file for the start date and shift selected for the program version, the program returns you to the start date box and provides a message: "This program of study is not offered for the shift and start date selected. Reselect the student's shift or start date as defined in the start date calendar."

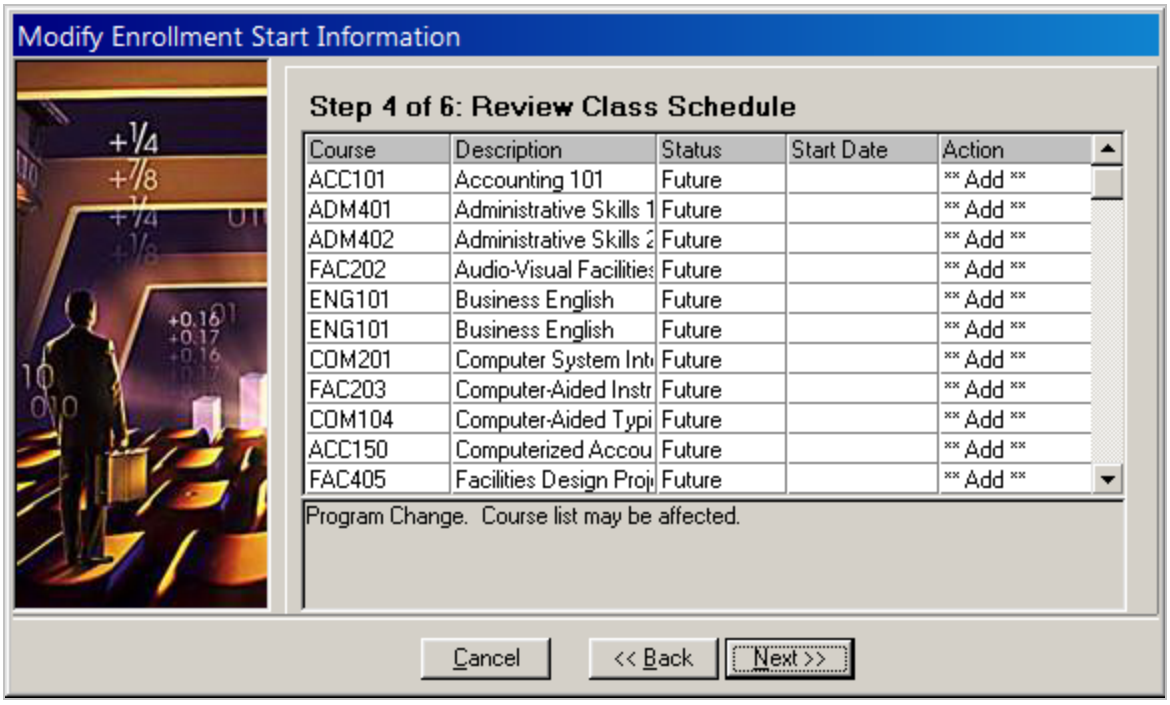
Step 3 of the Enrollment Change Wizard

This step offers you a review of the current and new fee schedules.



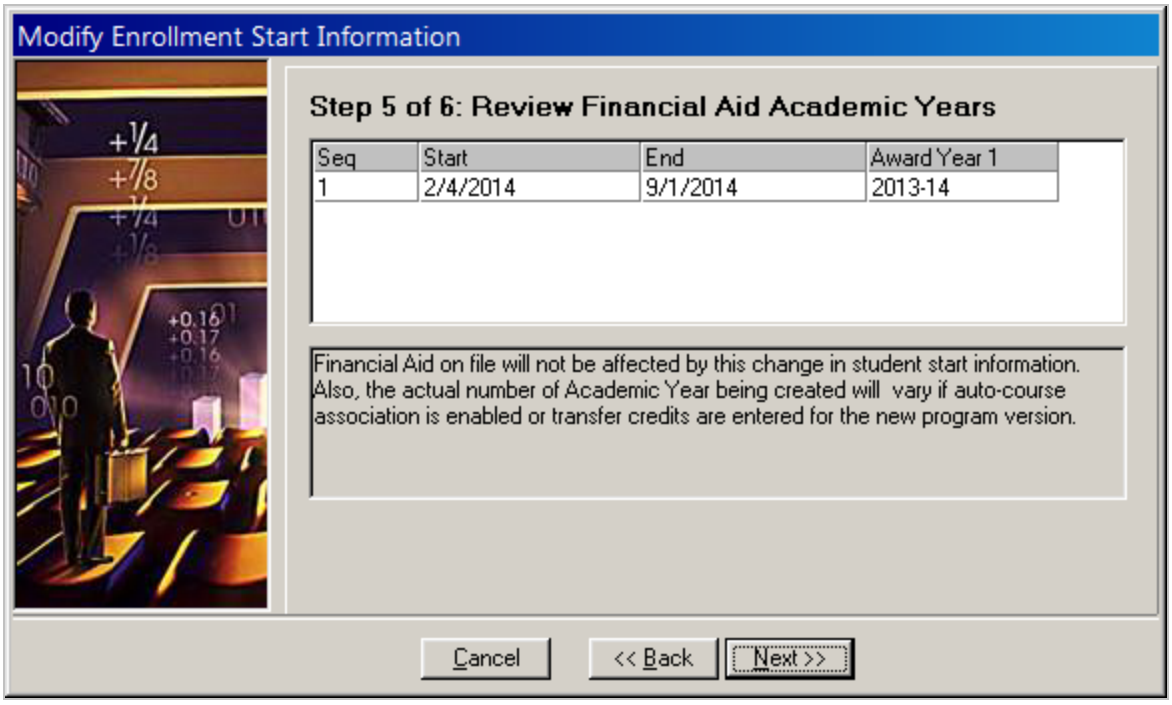
Step 4 of the Enrollment Change Wizard

This step is a review of the class schedule.



Step 5 of the Enrollment Change Wizard

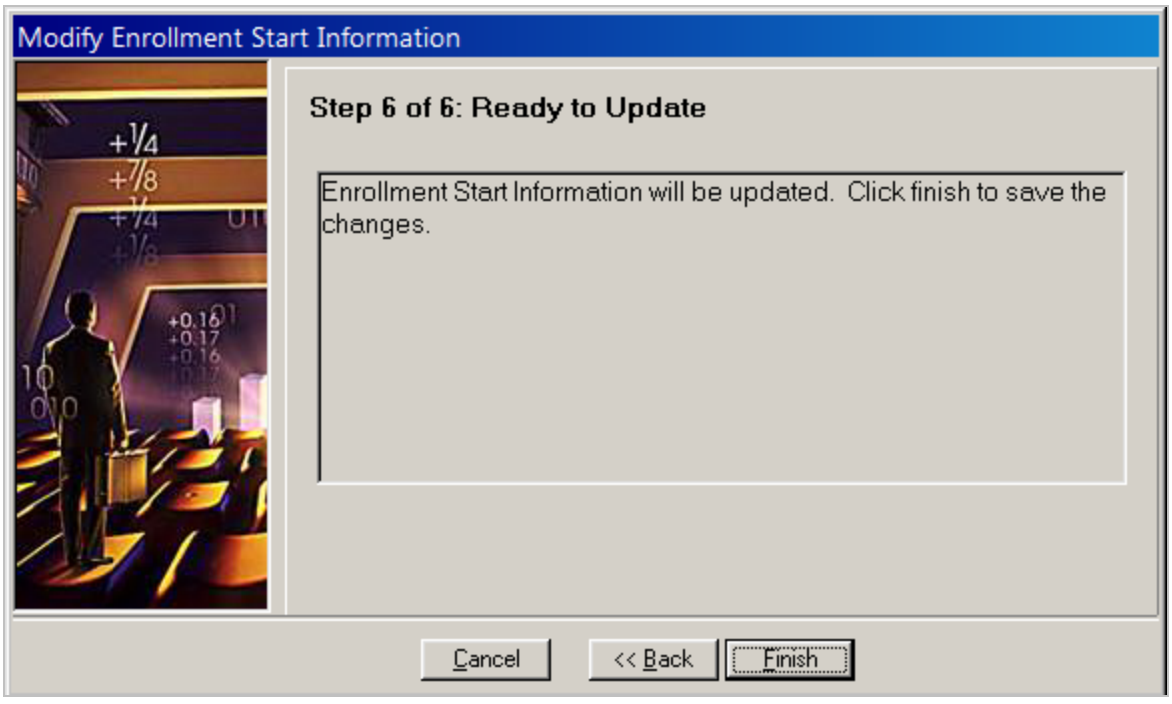
This step is a review of the Financial Aid Academic Years and Award Years.



Note: The academic year Start and End date for non-term programs are automatically updated to use the instructional weeks definition specified by the Department of Education (ED).

Step 6 of the Enrollment Change Wizard

This step shows a statement of the changes to be made when you click **Finish**.



Nothing is changed in the student's records until you click **Finish.** You can leave the student's records unchanged by clicking **Cancel** at any time before you click the Finish button. When you click **Finish**, the program will perform the necessary changes to the database and display a confirmation message when the task is completed.

Setup > Campus Locations > Financial Aid

The field called **FAA Administrator to be notified for Packaging Changes** on the Financial Aid page allows you to select the FA Administrator to be notified of program changes. CampusNexus Student assigns a review activity to this person for each program change.

Transfer Enrollment

Click here to go directly to the transfer procedure. For information about Non-Degree Seeking Students, see Tracking NDS students.

Click **Transfer** to transfer enrollment information from one enrollment to another. Clicking **Transfer** brings up a new form that defines the parameters of the transfer. The transfer is not allowed if there is any scheduled Financial Aid at **Ready to Pay** status (selected in a disbursement batch).

The form displays Current Enrollment information (Campus, Program, Program Version, Enroll Date, and School Status).

The form enables the user to select a different, existing enrollment record to which the information is to be transferred or allow the user to add a new enrollment record for the transfer. When listing the existing enrollments, only enrollments at status category of **Enrolled**, **Active**, or **Permanent Out** are listed.

When the transfer is saved, the business logic evaluates the data and performs the appropriate actions:

- Move all Current courses from the Old Enrollment to the New Enrollment record.
- Move ledger card entries from the Old Enrollment to the New Enrollment.
- Transfer all expected Financial Aid.
- Transfer Completed Course grades to the New Enrollment. The completed courses will be left under the Old Enrollment and any of the completed courses that are required for the new enrollment will have the grade transferred to the new enrollment.
- Set the Old Enrollment record to status "TOPROG" (Transferred to other program)
- Add records to the SyStatChange table indicating that the enrollment was transferred.
- Recalculate the GPA for both the Old and New Enrollments.
- Transfer subsidiary transactions, if applicable; see note below.
- Update all academic year dates based on the instructional weeks logic specified by the Department of Education (ED).

Security:

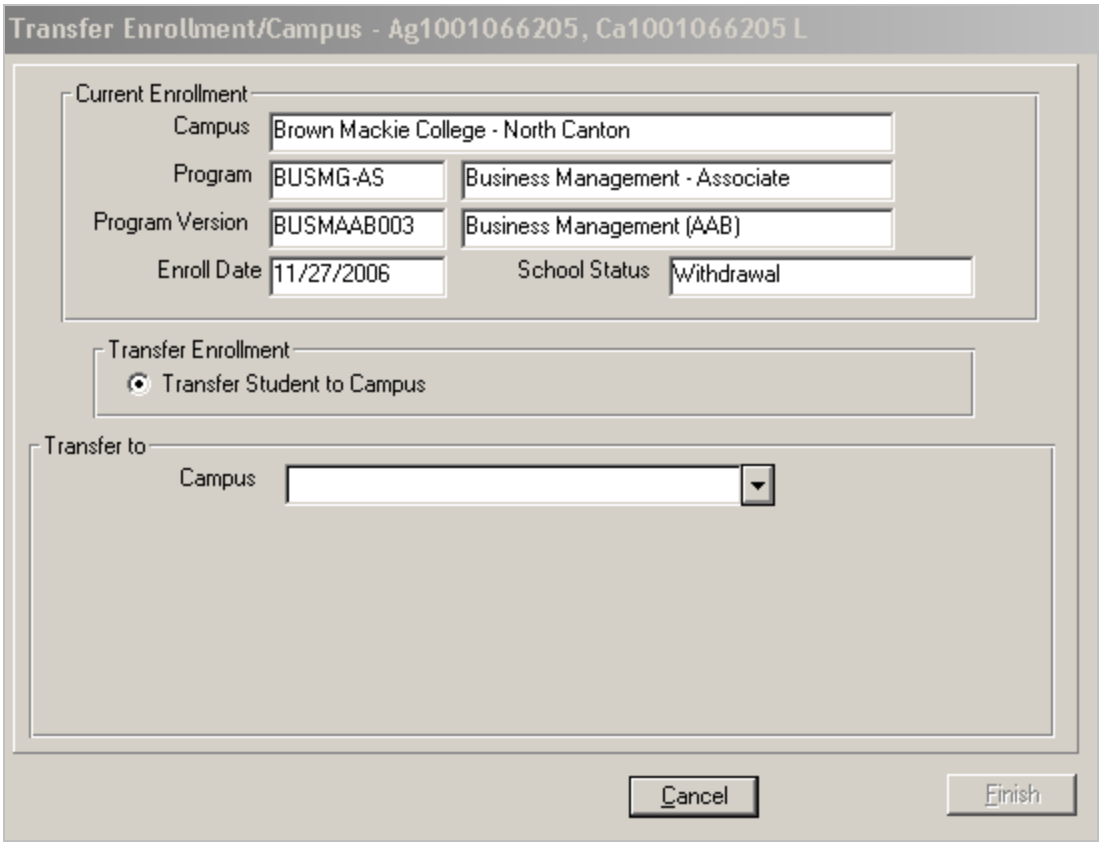
- The **Transfer** button will only be available if the user has BOTH **Add** and **Edit** authorization to the **View > Academic Records > Enrollment** form.
- Only Enrollments at a status that is in the **Enrolled** or **Active** categories will be allowed to transfer.
- If the "FROMPROG" or "TOPROG" status change is disabled or assigned to a Staff Group to which the user does not belong (in Setup > Status Codes), then the user will not be allowed to transfer the enrollment.

To transfer data from one enrollment to another:

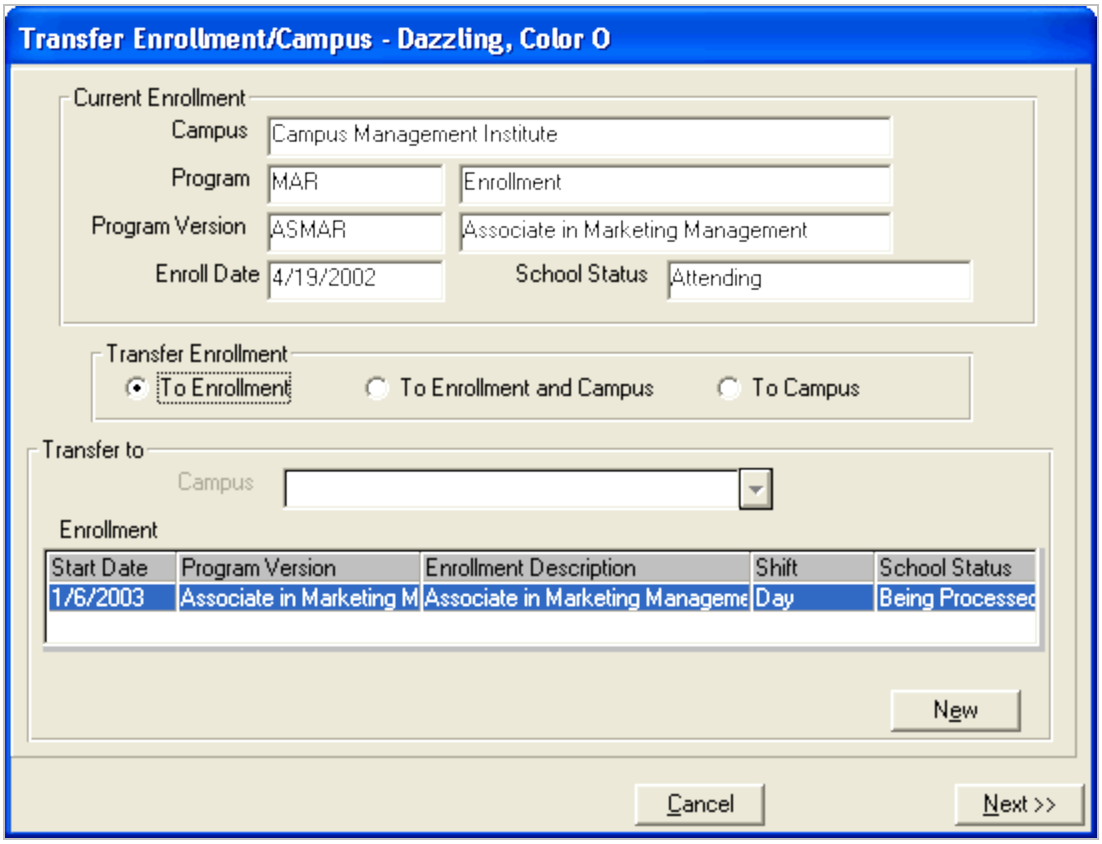
1. Select the student for whom the transfer is to be performed.
2. Select **View** > **Academic Records** > **Enrollment**. The Enrollment form is displayed.
3. In the grid at the top of the form, select the Enrollment from which the data is to be transferred.

   Note: The **Transfer** button changes to **Reverse Transfer** once a transfer has completed, and no status changes have been made. If you have made a mistake and haven't done anything else, you can return the student using the Reverse Transfer option.
4. Click **Transfer**. CampusNexus Student displays one of two Transfer Enrollment forms. The first form is for

transferring students with a status of Permanent Out and the only option is the **Campus** selection for this type of transfer. If you are using this form, after making your selection, just click **Finish**.



The second type appears below.



Data for the current enrollment is displayed in the top half of the form. The grid in the lower half of the form shows other enrollments for the selected student.

On this form you have three transfer options in the **Transfer Enrollment** fields:

To Enrollment - Allows a staff member to transfer a student to another enrollment within the same campus. The Campus Code and the OPEID will remain the same.

- If the 6-digit CIP Codes of the programs are not the same, the Credential Levels are different, or the published program length are different from the transfer from enrollment, the new enrollment must retain the school status selected in Step 2 of 5 in the enrollment wizard.

  Note: If the criteria for this scenario is met, the Version Start Date CANNOT be transferred to the new enrollment even if configured to do so. This is considered to be the program begin date for regulatory reporting.

- If the 6-digit CIP Codes are the same, the credential levels are the same, and the published program lengths of the program versions are all the same (match exactly), then it is okay to keep the existing functionality of leaving the student as active.

To Enrollment and Campus - Allows a staff member to transfer a student to another enrollment in another campus (which adds the new enrollment to the student's enrollment folder and changes the Campus field on the Student Master to the new campus). When 'To Enrollment and Campus' is selected, the CIP Code, Degree Level, or Published Program length may differ from the previous enrollment. The Campus Code will change and this means that the OPEID may also change.

- If the OPEIDs for the campuses are different, the 6-digit CIP Codes of the programs are not the same, the Credential Levels are different, or the published program lengths are different from the transfer from

enrollment, the new enrollment must retain the school status selected in Step 2 of 5 in the enrollment wizard.

Note: If the criteria for this scenario is met, the Version Start Date CANNOT be transferred to the new enrollment even if configured to do so. This is considered to be the program begin date for regulatory reporting

- If OPEIDs assigned to the campuses (transfer from and transfer to) are the same, the 6-digit CIP Codes are the same, the credential levels are the same, and the published program lengths of the program versions are all the same (match exactly), then it is okay to keep the existing functionality of leaving the student as active.

To Campus - Allows a staff member to transfer a student to another campus which changes the Campus field on the Student Master to the new campus.

- If the OPEIDs of the Campuses are different, the user must be forced to do an enrollment transfer as this is required due to regulatory reporting processes (SSCR, Clearinghouse, & potentially GE).

  Note: if the criteria for this scenario is met, the Version Start Date CANNOT be transferred to the new enrollment even if configured to do so. This is considered to be the program begin date for regulatory reporting. We need to be able to report the accurate start date for the program on the new OPEID

- If the OPEIDs assigned to the campuses (transfer from and transfer to) are the same then it is okay to keep the existing functionality of transferring the campus and leaving the enrollment in its current status.

Accurate Enrollment Reporting (Clearinghouse/SSCR processing, GE reporting), to NSLDS is required for all schools participating in Title IV aid and is essential to:

- Protecting borrower's rights by ensuring that loan interest subsidies are based on accurate enrollment data
- Ensuring loan repayment dates are accurately based on the last date of attendance
- Allowing in-school deferments to be automatically granted using NSLDS enrollment data
- Providing critical data about the effectiveness of Title IV aid programs, including completion data (IPEDs)
- Calculation to determine if a student has exceeded the 150% limit. Enrollment changes reported to NSLDS are used to recalculate a student's 150% limit and determine if loss or protection of subsidy should occur

Notes:

- When an Active student transfers into another program using the Transfer Enrollment option of **To Enrollment** or **To Enrollment and Campus**, SAP enrollment is automatically linked (i.e., the **Linked SAP Enroll** field will not appear in Step #3 of the Enrollment wizard) and is recorded in the Admissions Audit.
- If a student meets the criteria for Active status on a program version, the student's status may change to Active post transfer. However upon the initial transfer, the status selected by the user in the enrollment wizard is the status used for the student.

5. If there are no enrollments listed on the grid, or if the enrollments shown on the grid do not include the one to which the student is transferring, click **New** to enter a new enrollment. The Enrollment wizard is displayed.

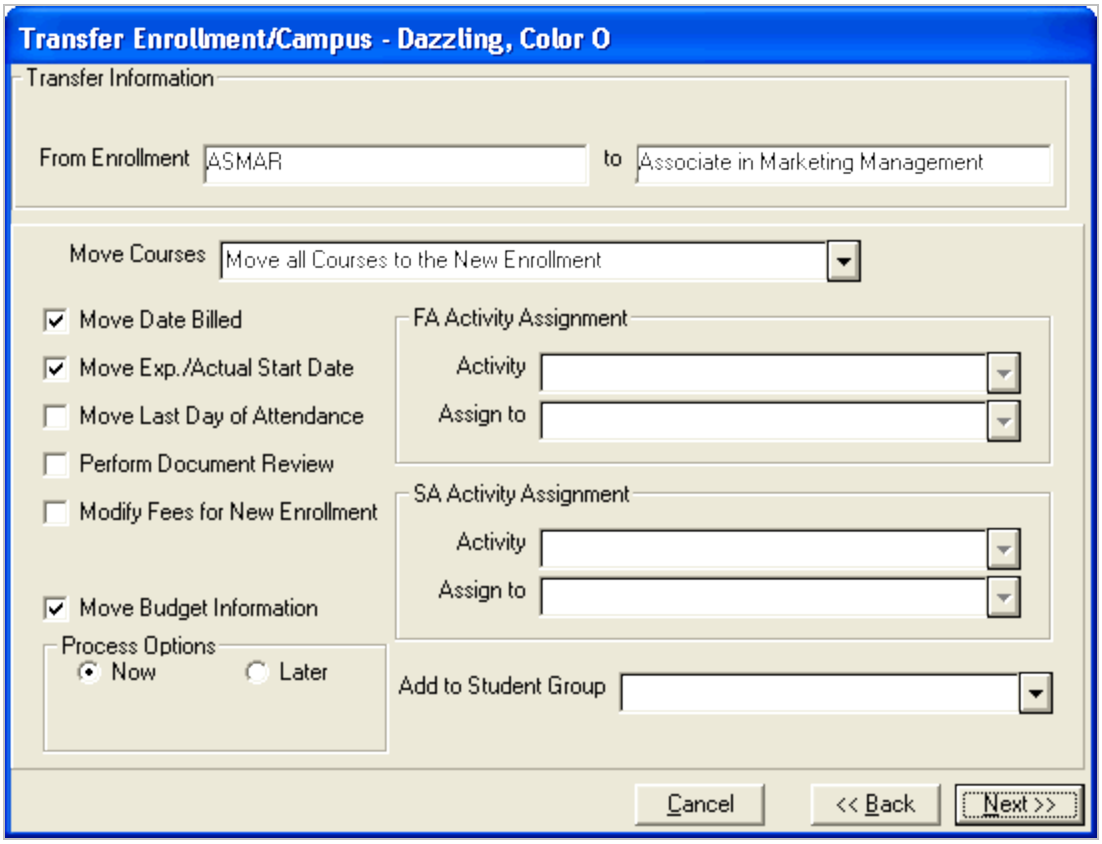
   Note: When adding a new enrollment from the transfer wizard, academic year start and end dates will be calculated the same as adding a new enrollment. For "To Campus" transfers, the weeks in academic years field value will be used when moving academic years from the current enrollment to a new one created by the wizard when finishing the process. This applies regardless of whether the "Use TerminAYDates" flag is enabled or disabled.

6. Click **Next** and the following form is displayed.

If a staff member has override permissions (Allow User to Override Transfer Configuration Options in the Academic Records tab of the Staff information form is selected) and the **Move Exp./Actual Start Date** check box is selected, then the Expected Start Date, Graduation Date and Version Start Date will be copied in the transfer. Then, an evaluation occurs to determine if the new enrollment meets the criteria to go active, based on the Active Units configuration of the Program Version. If Active Units criteria are met then the Version Start Date will be set appropriately. For example, if an existing enrollment has 3 current courses (Attendance Posted) and if all them are getting transferred with the Program Transfer, then the Version Start Date of the new enrollment will also be copied over.

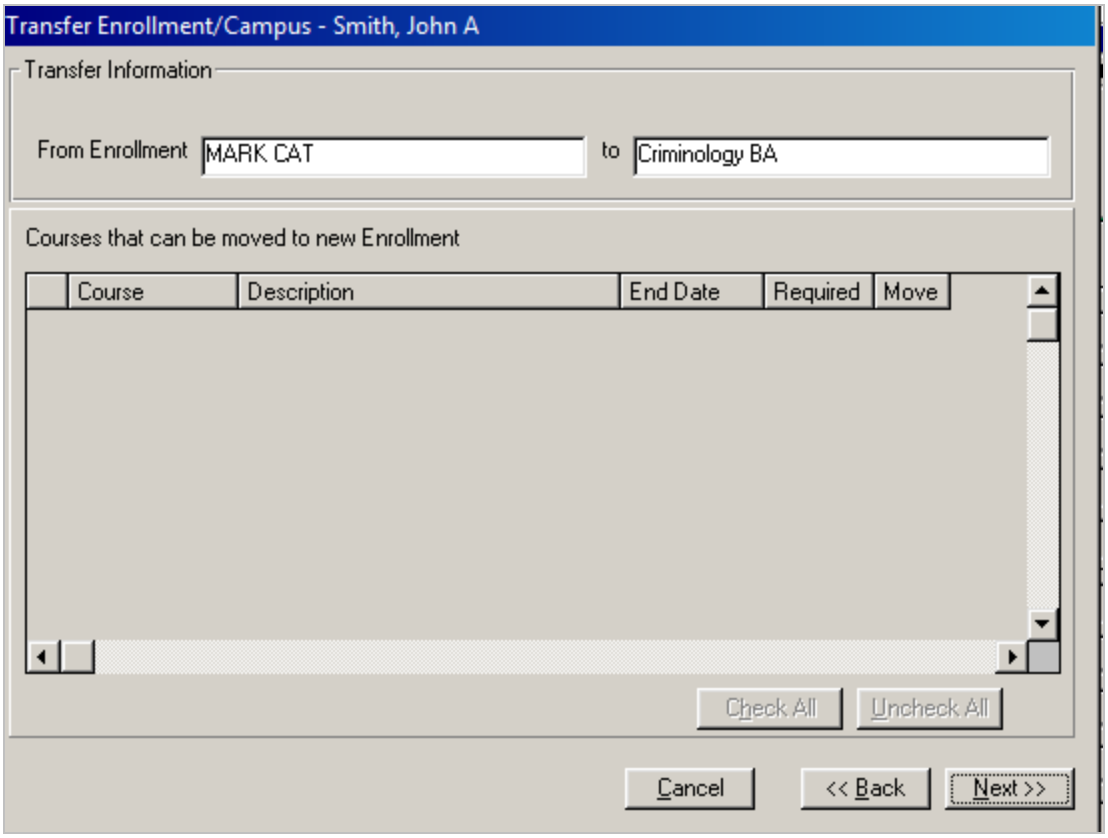
When performing a Transfer for non-term program versions, the **Move Exp./Actual Start Date** check box should only be selected if the program version being transferred to meets the criteria outlined in the FSA handbook for allowing the student to remain in the same payment period. When that selection is processed in the transfer, the system captures the completed date of the last payment period and uses it as the SPE start date on the new enrollment. All student Financial Aid information from the old enrollment prior to that date is transferred to the new enrollment. This memorializes that information and should not be automatically changed by the SPE if it is configured for adjustments.

Note: The Start date should not be transferred if a student is moving from a Term based program to non-term, clock hour to any other academic calendar, or vice versa.

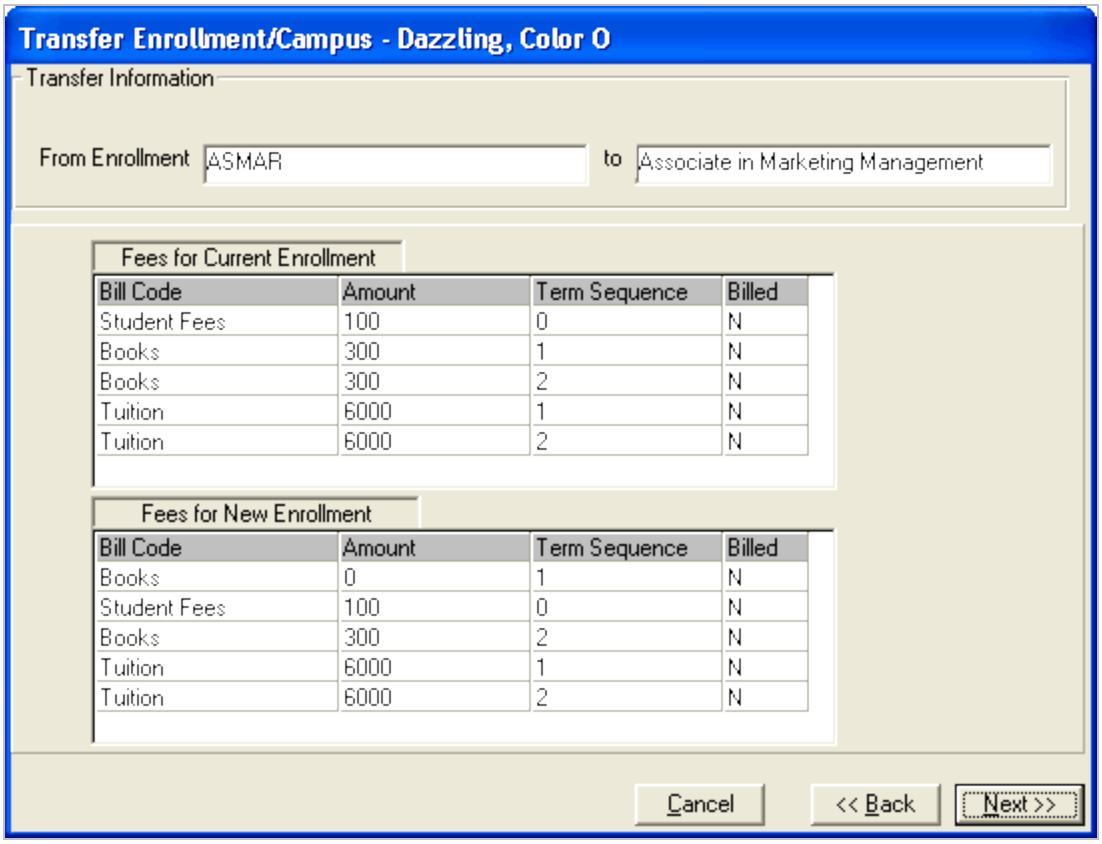


Note: The option Move Start Date to New Enrollment is displayed ONLY if the staff member viewing the form can override transfer configuration options, as configured in the Academic Records tab of the Staff Information form.

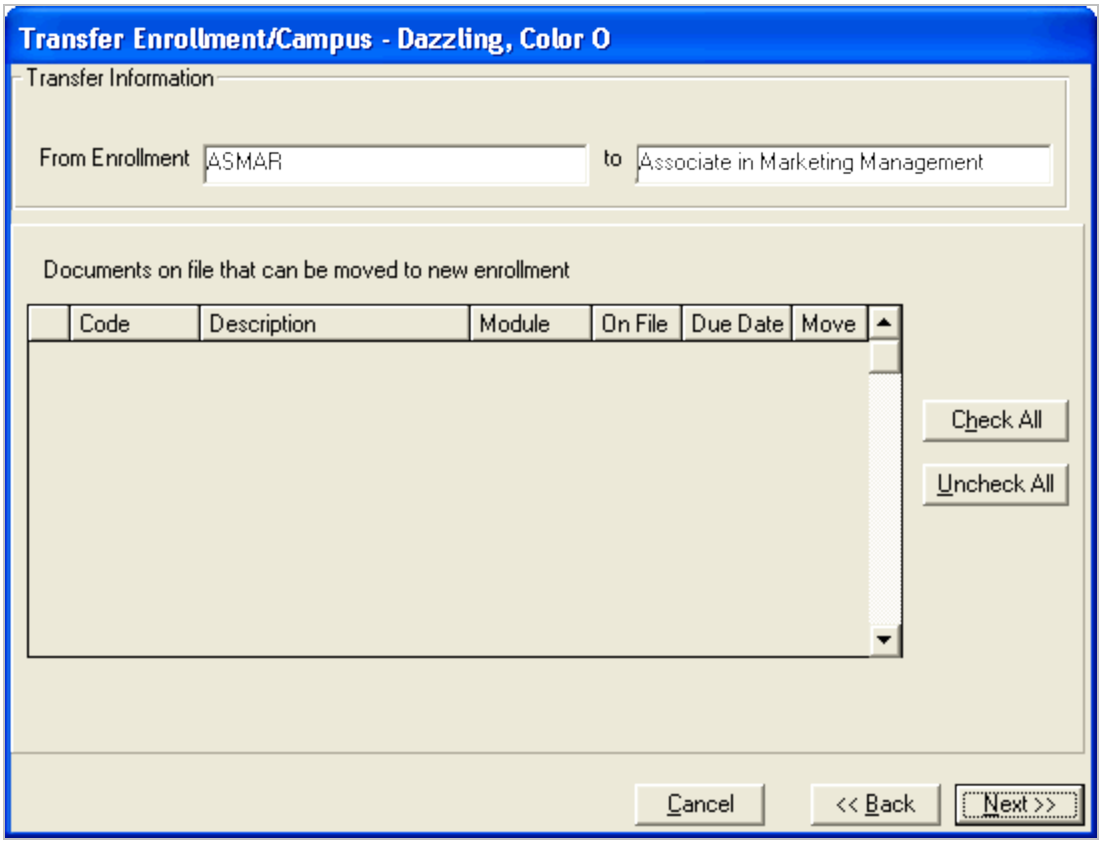
7. You can select to **Move Budget Information**, and to process this transfer now or later.
8. Click **Next**. A summary of the transfer displays.



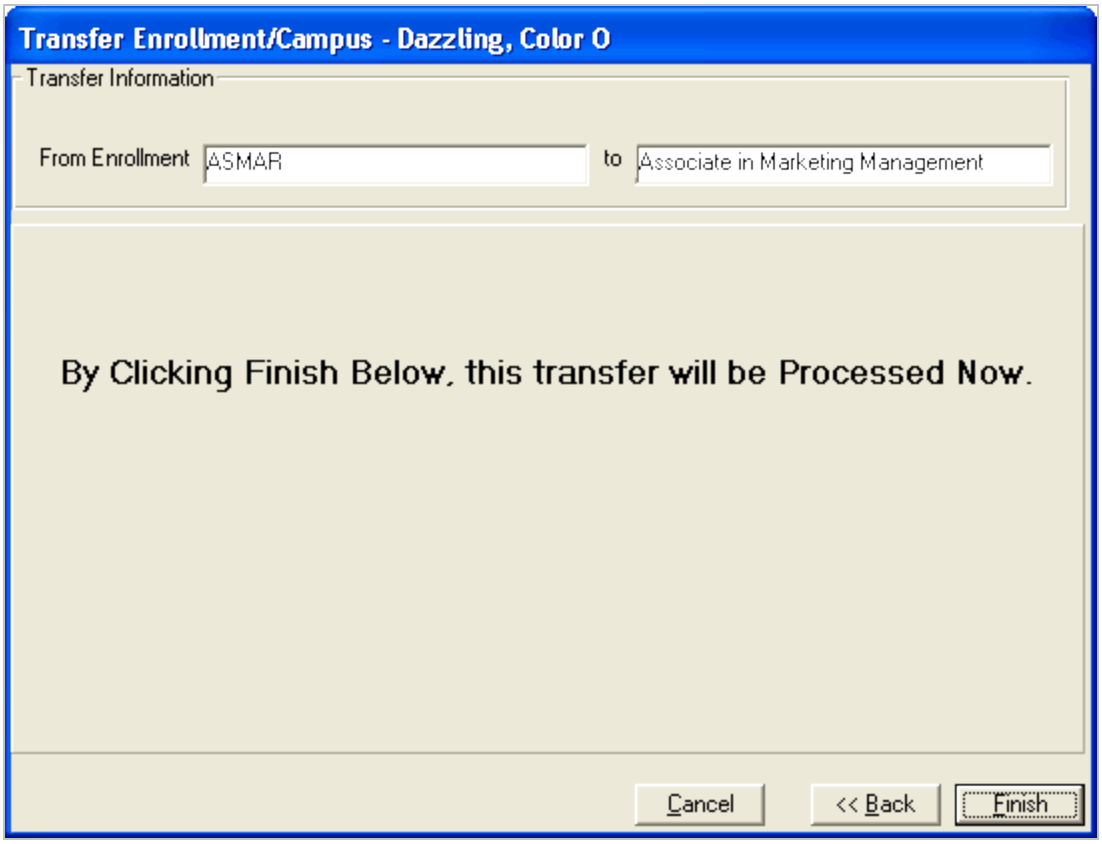
9. The next form only appears if transfer To Enrollment or transfer To Enrollment and Campus were selected and Modify Fees for New Enrollment check box was selected in setup.



10. The following form appears only if transfer To Enrollment or transfer To Enrollment and Campus were selected, and Perform Document Review check box was selected in setup.



11. Click **Next** and the last form appears with a message explaining what is about to occur.



12. Click **Finish** to transfer the information from the source enrollment to the destination enrollment or queue. When CampusNexus Student has completed the transfer of enrollment data, it will display a confirmation message.
13. Click **OK** to acknowledge the message and return to the Enrollment form.

To process queued transfers go to Process Queued Transfers under the **Daily > Academic Records** menu.

Note: If a program is setup in **Lists > Financial Aid** to add one academic year to a student's program version enrollment, and the previous enrollment from which they are transferring has more than one academic year, when selecting to transfer financial aid, the form checks the number of academic years the new enrollment has against the old. If the first has less than the second, a message box asks the user to continue or cancel and warns about the missing second year aid data.

If the enrollment is canceled, there are two methods of correction so that the aid will transfer:

a. On the student level: navigate to **View > Financial Aid > Packaging** and add an Academic Year. Process the transfer, and the second year aid will transfer to the newly added second year.
b. On the Program Version level: navigate to **Lists > Financial Aid > Program > Edit** and add an Academic Year in the form to set up a second Award Year. Then delete the newly added enrollment and restart the transfer process again.

Transfer of Subsidiary Transactions Upon an Enrollment Transfer

As soon as a student transfers to a new enrollment via the Enrollment Transfer Wizard, the system will transfer all Subsidiary ledger transactions (not just the balance) from the old enrollment to the new enrollment. The system will use the subsidiary linked to the enrollments, so that only matching subsidiaries will transfer the ledger entries (for example, Housing to Housing, or Tools to Tools, but a Housing subsidiary balance will never transfer to a Tool subsidiary).

If the subsidiary ledger already exists on the new enrollment, the system will append the transactions from the old subsidiary to the subsidiary on the 'transferred to' enrollment. If the subsidiary ledger does not exist on the new enrollment, then the system will update the AdEnrollID on the subsidiary header and details trans tables.

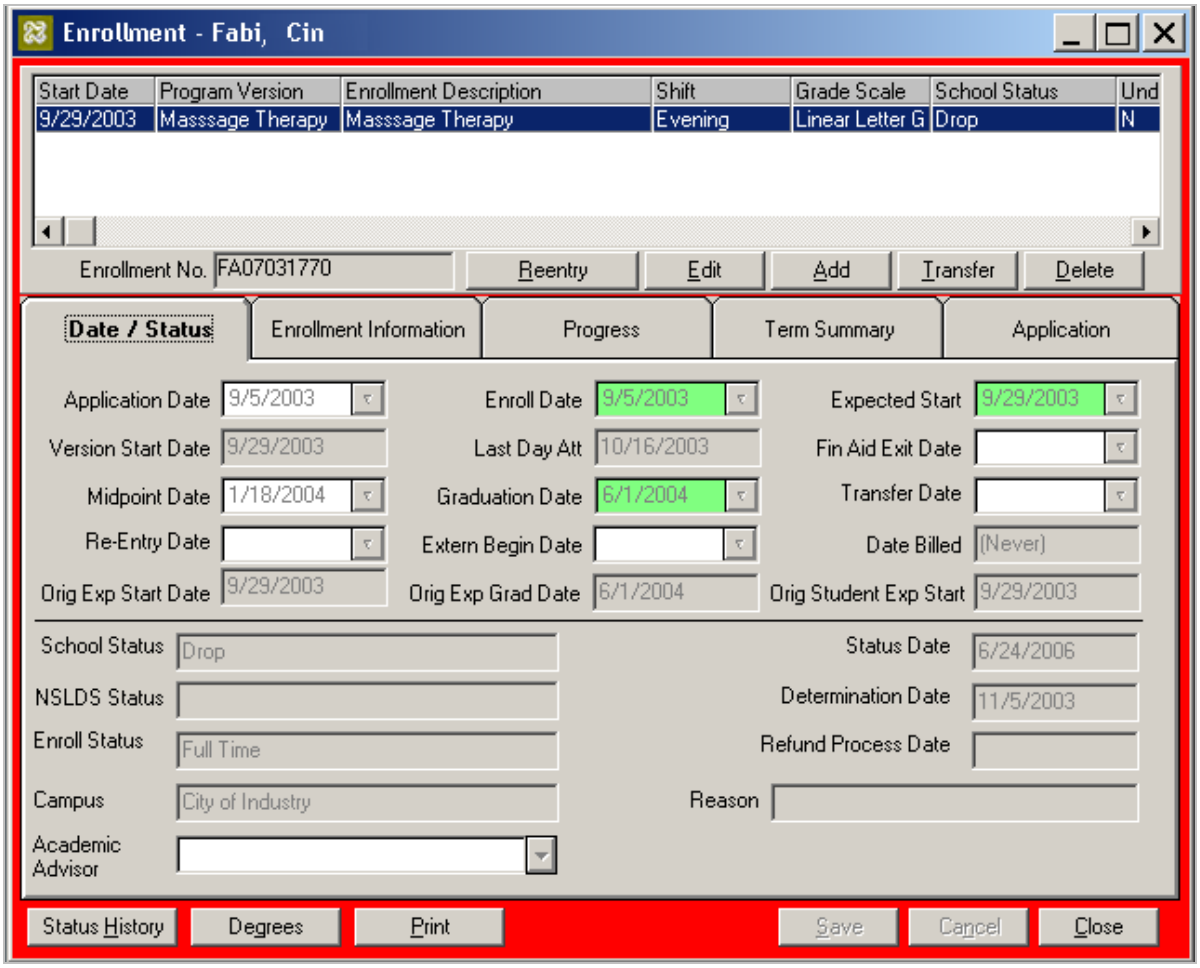
Reentry Wizard

This wizard extends the basic features of the Enrollment wizard to include information specific to the reentry process. It operates much like the Enrollment wizard does, in that it will recalculate necessary information such as length of program, financial aid academic years, midpoint and graduation dates, and so on. A setup option is used to handle status changes after first attendance is taken.

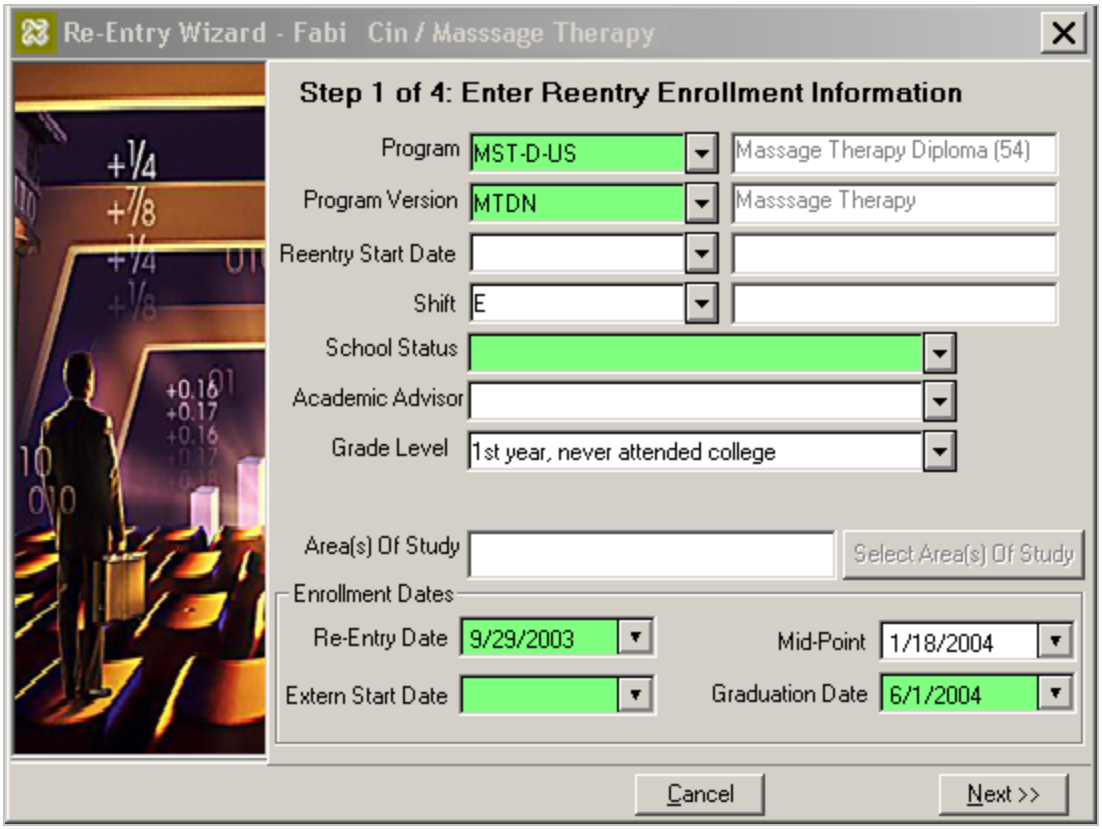
To perform the reentry process:

1. Select a student.
2. Navigate to **View > Academic Records > Enrollment**. The Enrollment form is displayed. The Reentry button is displayed when you select a program that has been assigned the status Permanent Out.

   Note: If the program version selected is one which was previously reentered as a new program/program version, the Reentry button is disabled.



3. Select a program version with the School Status of Permanent Out and click the **Reentry** button to enable the Reentry Wizard. Step 1 of the wizard is displayed. Note that the student's original program and/or program version is displayed by default and is available for selection (even if it is now inactive).

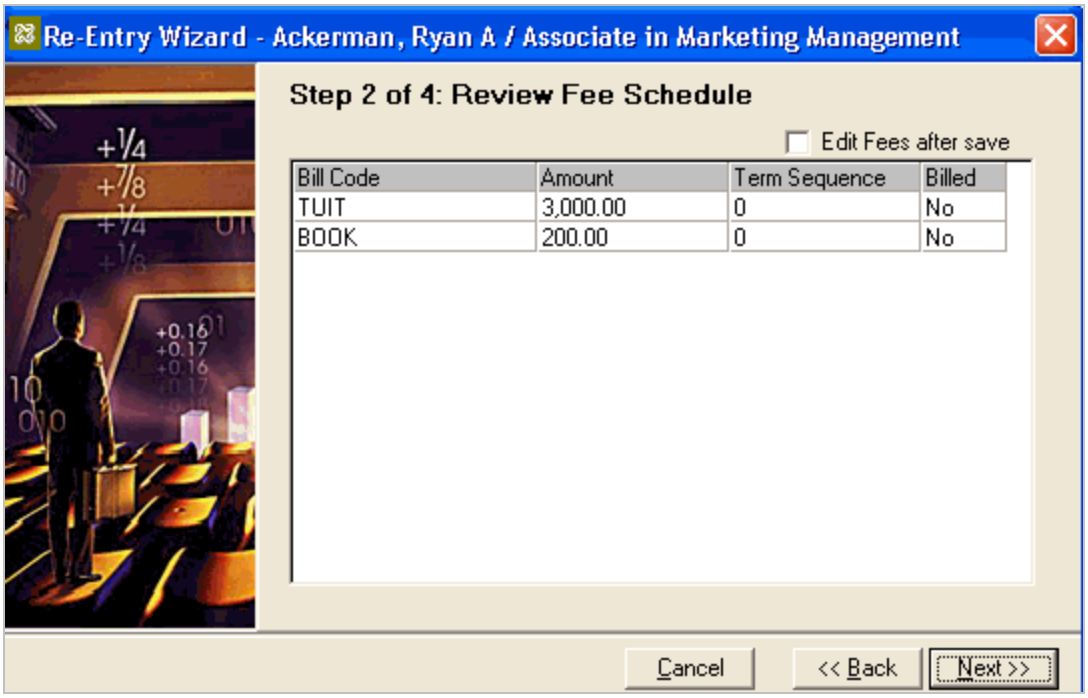


4. If the student is reentering into a new program/program version, select from among the active **Program**s and **Program Version**s displayed in the corresponding drop-down lists.
5. If applicable, select from a list of valid **Reentry Start Date**s.

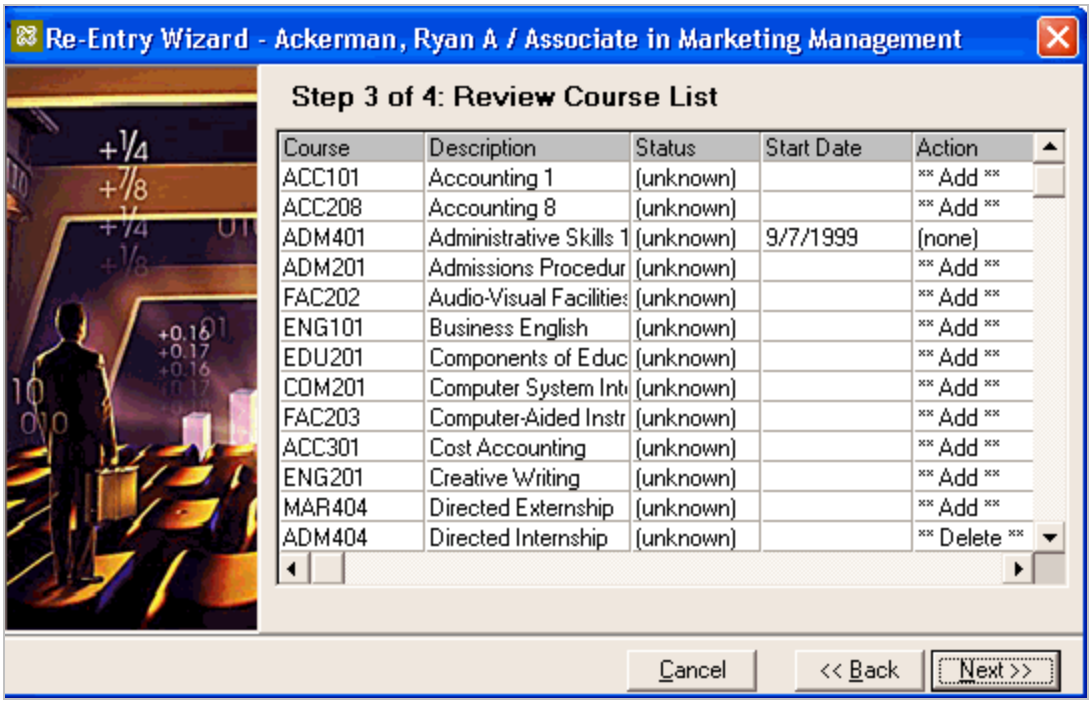
   Note: Whether you will be required to select a Reentry Start Date depends on the Require Start Date configuration under Academic Records Settings:

   - If Require Start Date is set to Not Required, it is not necessary to select a Reentry Start Date.
   - If Require Start Date is set to Required, then you must select one of the valid Reentry Start Dates as configured for the program version (see Lists > Academic Records > Program Version > Start Date Setup or Lists > Academic Records > Start Date) to reenter the student.
     - If the Start Date is configured to be required and not modifiable, then it is required in the Reentry Wizard and the Expected Start, Mid-Point and Graduation Dates cannot be modified.
     - If the Start Date is configured to be required and modifiable, then it is required in the Reentry Wizard and the Expected Start, Mid-Point and Graduation Dates can also be modified.
6. Assign a new future **School Status** for the enrollment, and update the **Shift**, **School Status**, **Academic Advisor,** and **Grade Level** fields (if required).
7. If the student's reentry program allows the choice of an Area of Study, the field will contain filtering options allowing you to select the Area(s) of Study for students enrolled in the selected Program Version. It enables you to select components for the course of study and then displays them in a tree structure. In the tree view, the root will be the student Program Version/Degree; under the Program Version/Degree will be a folder for each Area of Study.
8. Verify the **Reentry Date**, **Midpoint, Extern Start Date**, and **Graduation Date**.

9. Click **Next**.
10. Depending on whether the student is reentering into a new program/program version or reentering their original program, the wizard will display a different set of forms. For instructions on handling a student reentering the program in which they were previously enrolled, continue to the next step. For instructions on handling a student who is reentering into a new program, see section Reentering into a New Program.
11. For a student reentering their original enrollment, the wizard will proceed to Step 2.



12. Check the **Edit Fees after save** check box to edit the fees after the Re-entry process.
13. Click **Next**.



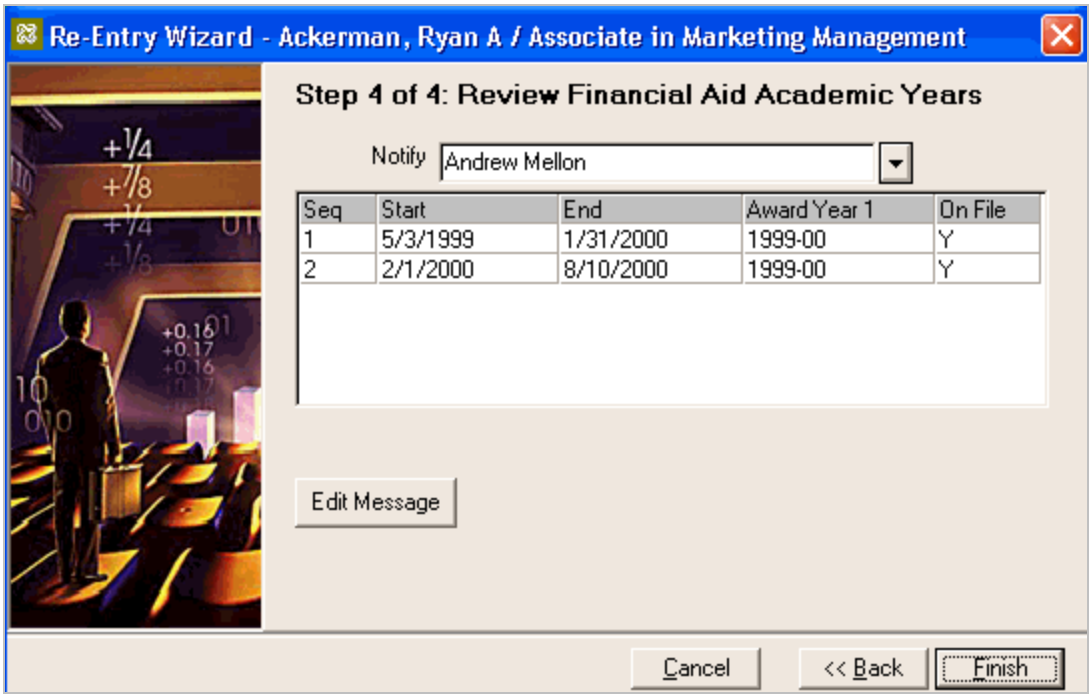
14. Review the new course schedule, based on the new Enrollment Start Date. The class schedule displays the current status and action of each class as it relates to the student's schedule folder. Depending on the status of the required courses, they will have the following actions displayed:

Matrix: Course - Status - Action

Course	Status	Action
New	Unknown	Add
Future	Future	None or Delete
Scheduled	Scheduled	None or Delete
Completed	Completed	None
Current	Current	None
Dropped	Dropped	None

All other course statuses are displayed with an Action of None

15. Click **Next** to continue to Step 4 of the Reentry wizard.



16. Click **Finish** to process the reentry. If you had selected **Edit Message,** an area will appear on the form allowing a message to be associated with the Financial Aid Academic Years.

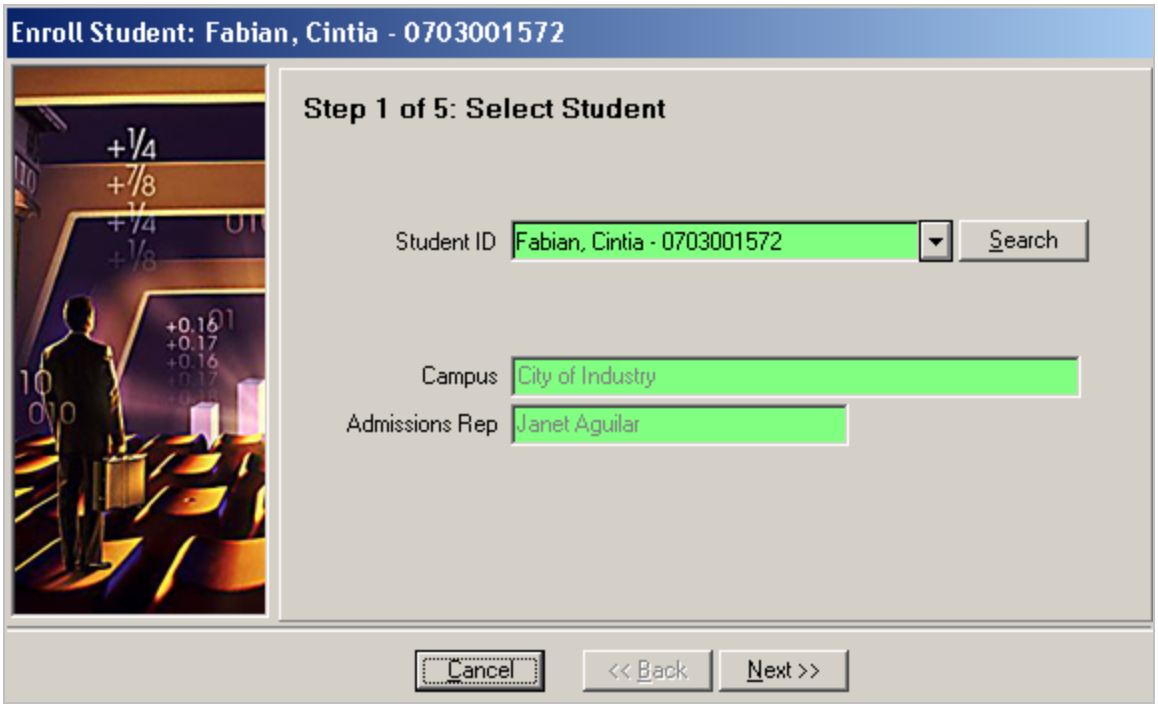
Reentering into a New Program

If the program/program version selected in Step 1 of the Reentry Wizard is new (i.e., different than the student's original program/program version), the wizard will process the reentry differently. The process is similar to a student enrolling into a new enrollment, but since some of the information has already been entered or exists in the system, only five (5) steps are required instead of the seven (7) steps for a new student enrollment.

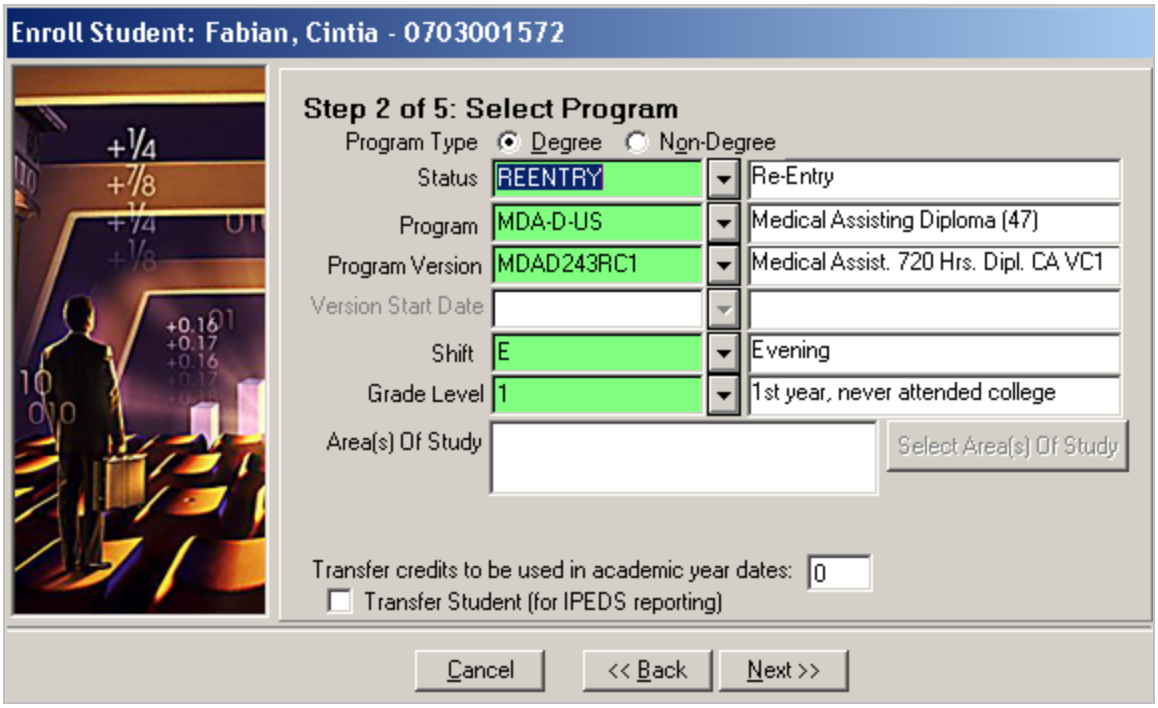
1. After **Next** is selected in Step 1 of the Reentry Wizard, the system will detect that the student is entering a different (i.e., new) program/program version. As this requires that a new enrollment record be created, a message will be presented warning that a new enrollment record is about to be created.

   Click **OK** to proceed or **Cancel** to return to Step 1 of the Reentry Wizard.

2. The wizard will now proceed through the process used to create a new enrollment.

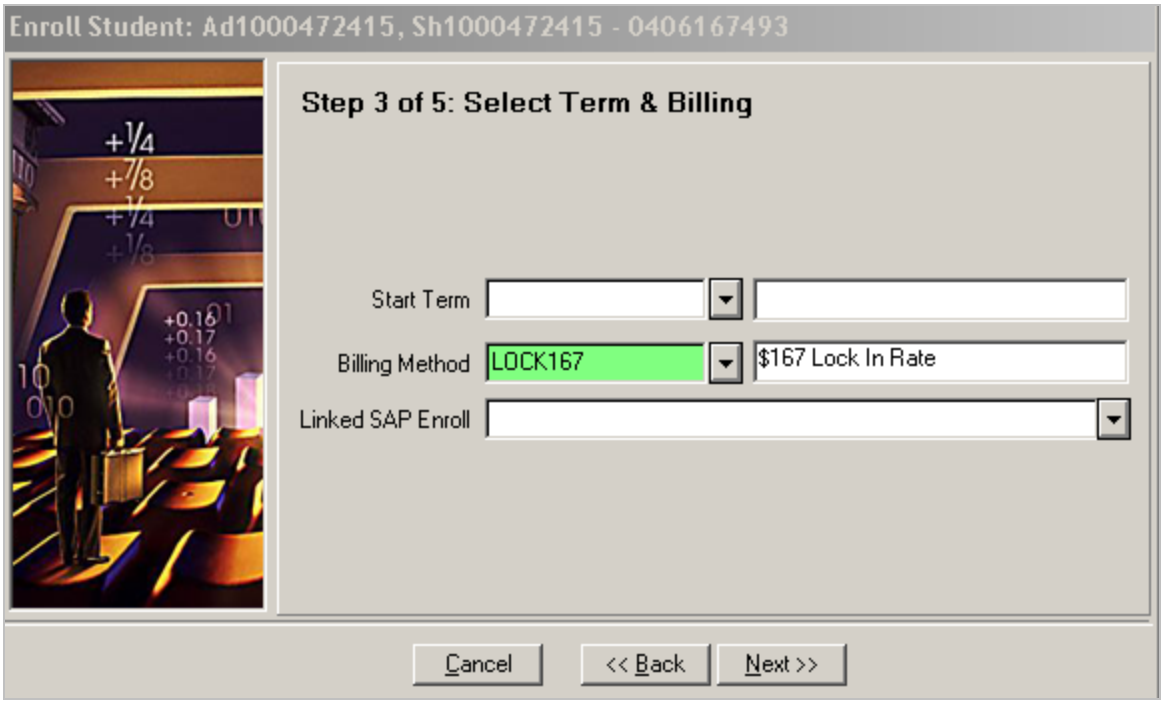


3. The **Student ID**, **Campus** and **Admissions Rep** will be copied from the student's existing record. Click **Next** to continue.
4. **Step 2 of 5: Select Program** will display the Program Information copied from the information entered in Step 1 of the Reentry Wizard.



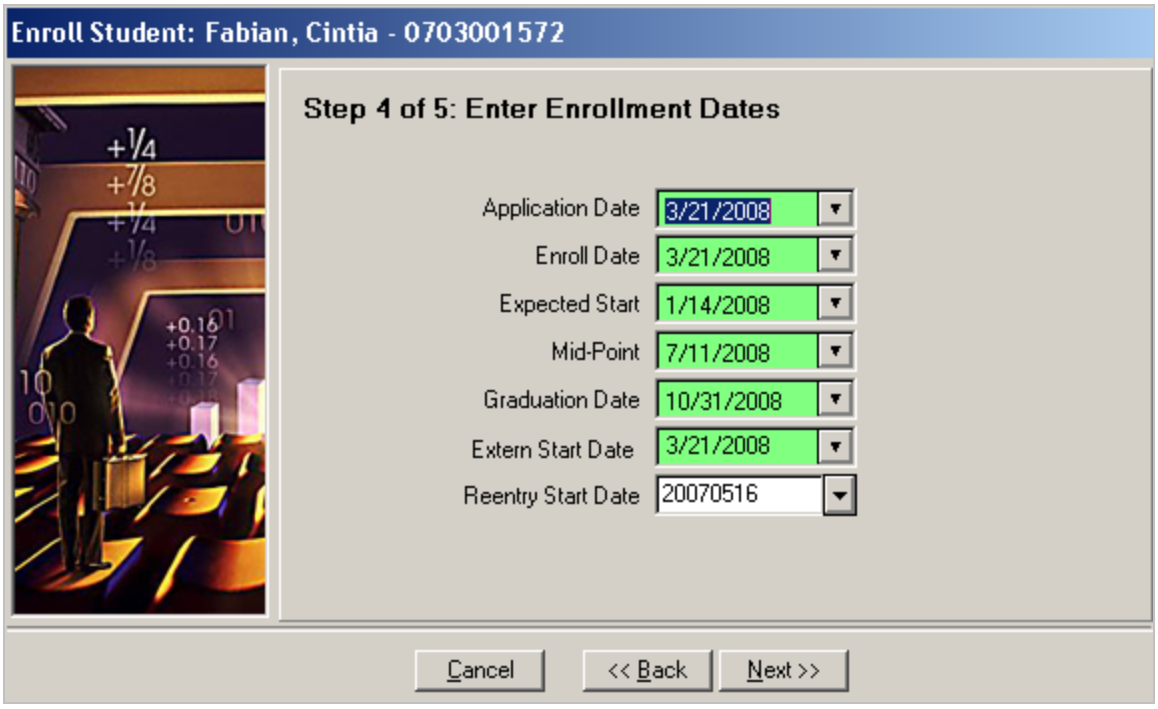
Review and update the Program Information as required and then click **Next**.

5. **Step 3 of 5: Select Term & Billing** displays the Term and Billing information.

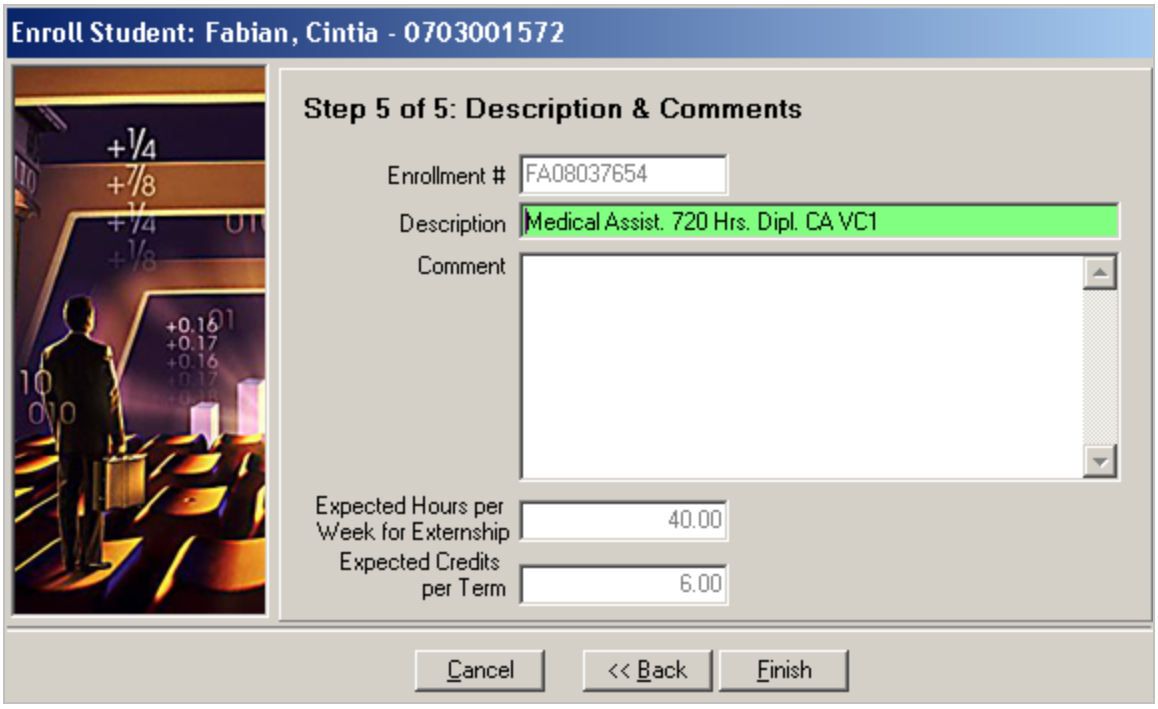


6. Select the **Start Term** from the list. The term list is set up under Lists > Academic Records > Terms. The default Term Start Date will be the Reentry Date entered in Step 1 of the Reentry Wizard.
7. Select the **Billing Method**. The billing methods are set up under Lists > Student Accounts > Billing Methods. This is a required field. The system defaults to the billing method for the student's primary Billing Affiliate.
8. Select any previous Permanent Out enrollment from the **Linked SAP Enroll** drop-down list for this new enrollment. **Note**: This field will only be displayed if the system configuration for **SAP Enrollment Linking?** is set to **Yes** in Setup > Academic Records > Settings.
9. Click **Next** to continue processing.

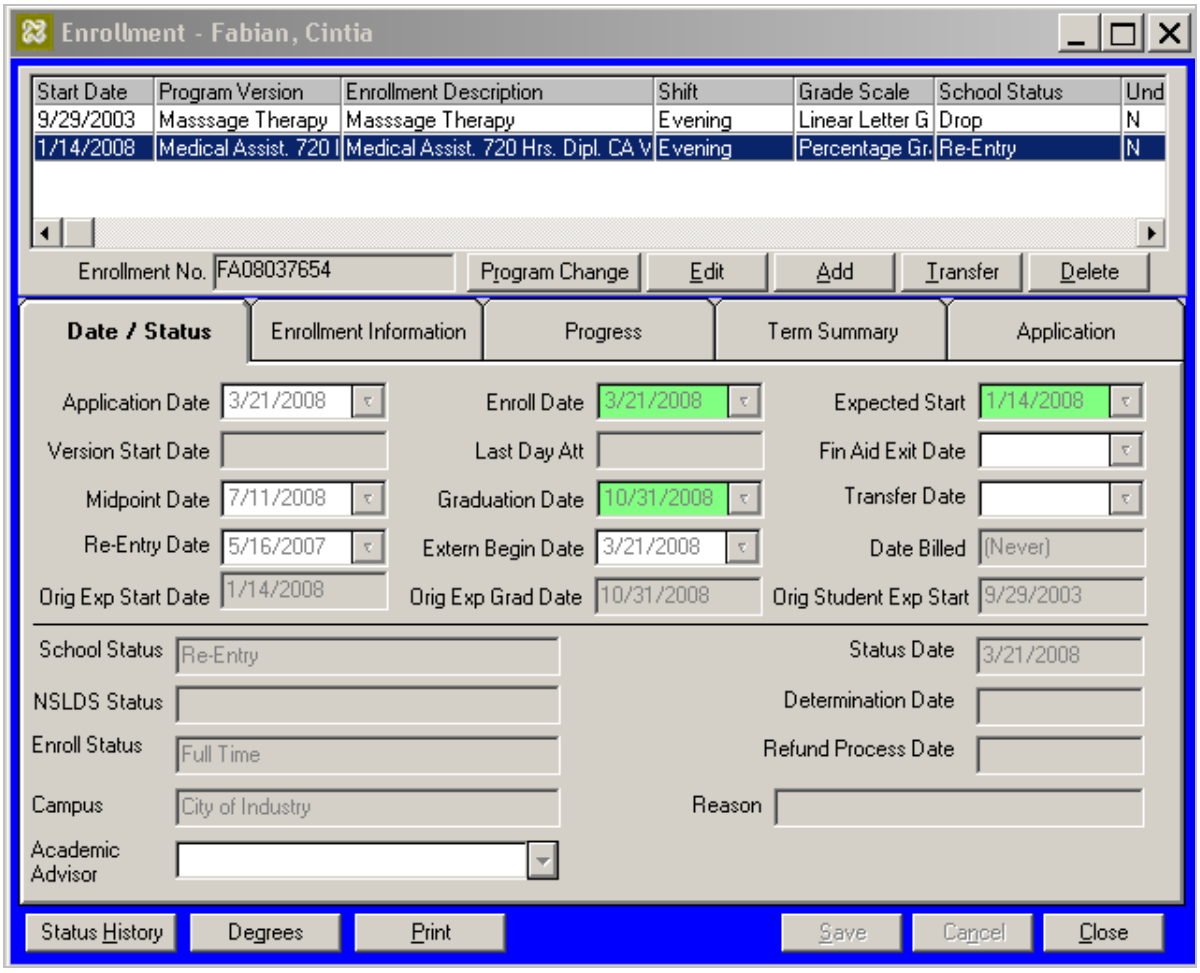
   Step 4 of 5:Enter Enrollment Dates allows you to select all applicable dates related to the enrollment.



10. Enter the appropriate dates for **Application Date**, **Enroll Date**, **Expected Start**, **Midpoint**, **Graduation Date**, **Extern Start Date**, and **Reentry Start Date**. The program fills in these dates from the program version setup. You can change these dates only if they are set up to be modifiable. If the program version was set to require an **Extern Start Date**, the field will be required on this page of the wizard. Otherwise, it will appear as an optional field.
11. Click **Next** to continue processing.
12. **Step 5 of 5: Description & Comments** of the wizard allows you to enter any comments regarding the enrollment, as well as verifying the student's ID and program.



13. The **Enrollment #** field will contain the Enrollment ID, and the **Description** field will contain the program selected in Step 1 of the Reentry Wizard (Enter Reentry Enrollment Information).
14. Enter any **Comments** that you want to add about this enrollment.
15. The **Expected Hours per Week For Externship** and **Expected Credits per Term** are assigned when setting up a program version. The fields will only be displayed here.
16. Click **Finish** to complete the enrollment.
17. Click **OK** to acknowledge that the student has been re-enrolled. You will be returned to the Enrollment form and shown the reentry enrollment.


Enrollment - Fabian, Cintia
Start Date
Program Version
Enrollment Description
Shift
Grade Scale
School Status
Und
9/29/2003
Masssage Therapy
Masssage Therapy
Evening
Linear Letter G
Drop
N
1/14/2008
Medical Assist. 720 I
Medical Assist. 720 Hrs. Dipl. CA V
Evening
Percentage Gr.
Re-Entry
N
Enrollment No.
FA08037654
Program Change
Edit
Add
Transfer
Delete
Date / Status
Enrollment Information
Progress
Term Summary
Application
Application Date
3/21/2008
Enroll Date
3/21/2008
Expected Start
1/14/2008
Version Start Date
Last Day Att
Fin Aid Exit Date
Midpoint Date
7/11/2008
Graduation Date
10/31/2008
Transfer Date
Re-Entry Date
5/16/2007
Extern Begin Date
3/21/2008
Date Billed
(Never)
Orig Exp Start Date
1/14/2008
Orig Exp Grad Date
10/31/2008
Orig Student Exp Start
9/29/2003
School Status
Re-Entry
Status Date
3/21/2008
NSLDS Status
Determination Date
Enroll Status
Full Time
Refund Process Date
Campus
City of Industry
Reason
Academic Advisor
Status History
Degrees
Print
Save
Cancel
Close

Date / Status

Significant dates for a selected student's enrollment are shown on the **Date / Status** tab. You can edit some of the dates; some are maintained by CampusNexus Student. You cannot edit the dates maintained by the system. You can also see some information about the student's school status and enrollment status. This is where the student's academic advisor is assigned.

When a student's status is changed to DROP or NDS-DROP, the"Expect Disbursements Within 30 Days of LDA on Drop?" option on the Fund Source Code Setup form is evaluated. If the option is blank (cleared), all scheduled FA disbursements not in an open disbursement batch are cancelled. If the option is selected, any disbursement where the scheduled disbursement date is within 30 days of the LDA defined during the status change are left at its current "scheduled" or "ready to pay" status.

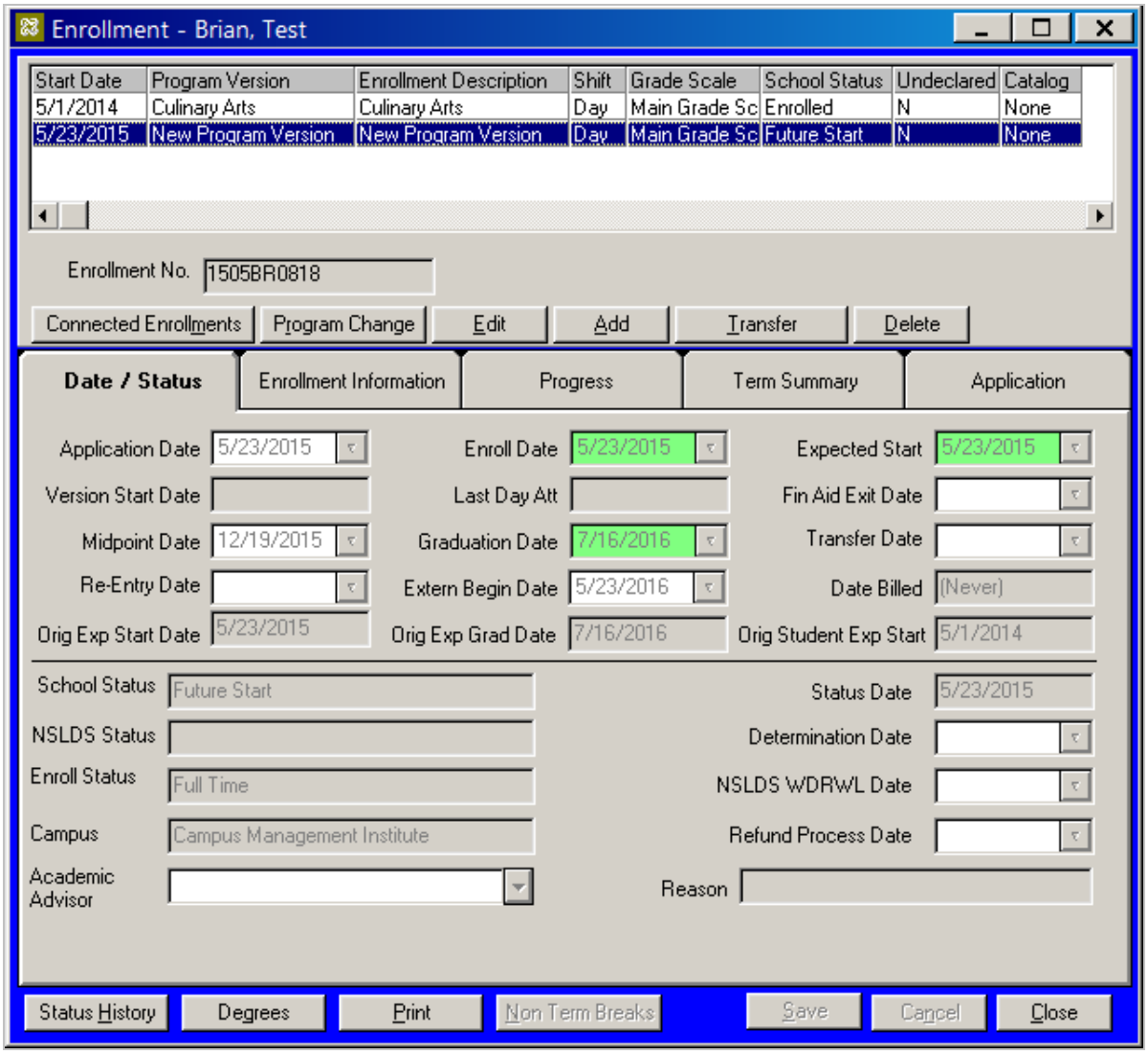
In conjunction with the Automatic Document Scheduler feature, document schedules based on "Pre-Enrollment" or "Enrollment" are evaluated when the status for a student is modified and saved on the status history form (frmAdStatusChange). If the student's data matches the specified criteria for a document schedule where the criteria include student status, all documents attached to the document schedule that are not already scheduled are scheduled for the student.

Loan Management: When you change a student's status to a Permanent Out Category, the program updates the Loan Status field to Grace, set the Loan Status Effective Date to the Enrollment Status Date, and sets the Repayment Date to the Enrollment Status Date plus the Grace Days. Each field change results in a record added to the Loan Management Status Change History table.

A student can be posted to an "Incomplete" status only if the student does not have any current classes. If the student has current classes, the program displays a message explaining why the student's status cannot be changed to "Incomplete".

To view or edit the date and status information for an enrollment:

1. Select a student for whom you want to view or edit the dates in the enrollment record.
2. Navigate to **View** > **Academic Records** > **Enrollment**. The student's Enrollment form is displayed. CampusNexus Student lists all students' enrollments, and fills in the form with data for each enrollment.



3. To edit an enrollment, select it in the top window of the form. Note the **Enrollment Number** under the list of enrollments. This is the student's identification number for the highlighted enrollment. All records for this enrollment are associated with this number. There is a different number for each enrollment.
4. Click **Edit** to open the selected enrollment for changes. The fields on the form that you can edit appear with white backgrounds. Fields that are "dimmed" are maintained elsewhere and cannot be edited here.
5. Enter new data or change existing data on the form.
6. Click Status History to view or change the student's status history for this enrollment.
7. Click Degrees to view or change the student's degrees, honors, and comments information.
8. Click **Print** to review or print the **Student Degree Evaluation Report** for the student selected. The report is also accessible at **Reports > Academic Records >**Student Degree Evaluation Report.
9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Field Descriptions

Field	Display/Edit	Description
Enrollment	Display	This is the number that was calculated for this student's enrollment by the system from parameters provided by your school.
Application Date	Edit	Enter the date that the student's application was received
Enroll Date	Edit	Enter the date that the student enrolled in this program version.
Expected Start	Edit	Enter the date that the student is expected to start this program version. Modifying this date will change the **Orig Exp Start Date** listed below, however an information message will appear asking you if you would like to use the Change Start wizard. To use the Change Start wizard, then select the 'Yes' option. You may make the changes in Step 2 of the wizard.
Version Start Date	Display	This is the actual date that the student started this program version. When selecting the **Program Change** button, the program version start date drop-down list will contain start dates for the program versions for the student's enrollment campus
Last Day Attended	Display	This the date that the student last attended a class in this program version.
Financial Aid Exit Date	Edit	Enter the date that the Financial Aid Exit Interview was conducted with this student.
Midpoint Date	Edit	Enter the estimated date that the student will reach the midpoint in this program version.
Graduation Date	Edit	Enter the estimated date on which the student will graduate from this program version.
Transfer Date	Edit	Enter the date that this student transferred out of this program version.
Re-Entry Date	Edit	The Re-entry wizard should initially be used to return the student from a Permanent out status category, as that process correctly populates this date field. This field should only be edited if that initial re-entry changes due to the student returning earlier or later than expected. Whenever the Re-entry Date is changed for an enrollment configured for a non-term program version, the system checks if the student has been out of school for more than 180 days. This evaluation is used in the creation of academic year and loan period sequences. Please see Academic Years for more information. Enter the date that this student re-entered this program version. Note: If a student is moved to Re-entry status using this field and then the Re-Entry Date field is updated again afterwards, a dialog box appears with the following message and Yes and No buttons: "Update expected start date to reflect changes made to re-entry date?". Ensuring the user confirms or denies the date change guarantees the integrity of the Expected Start Date in the system.

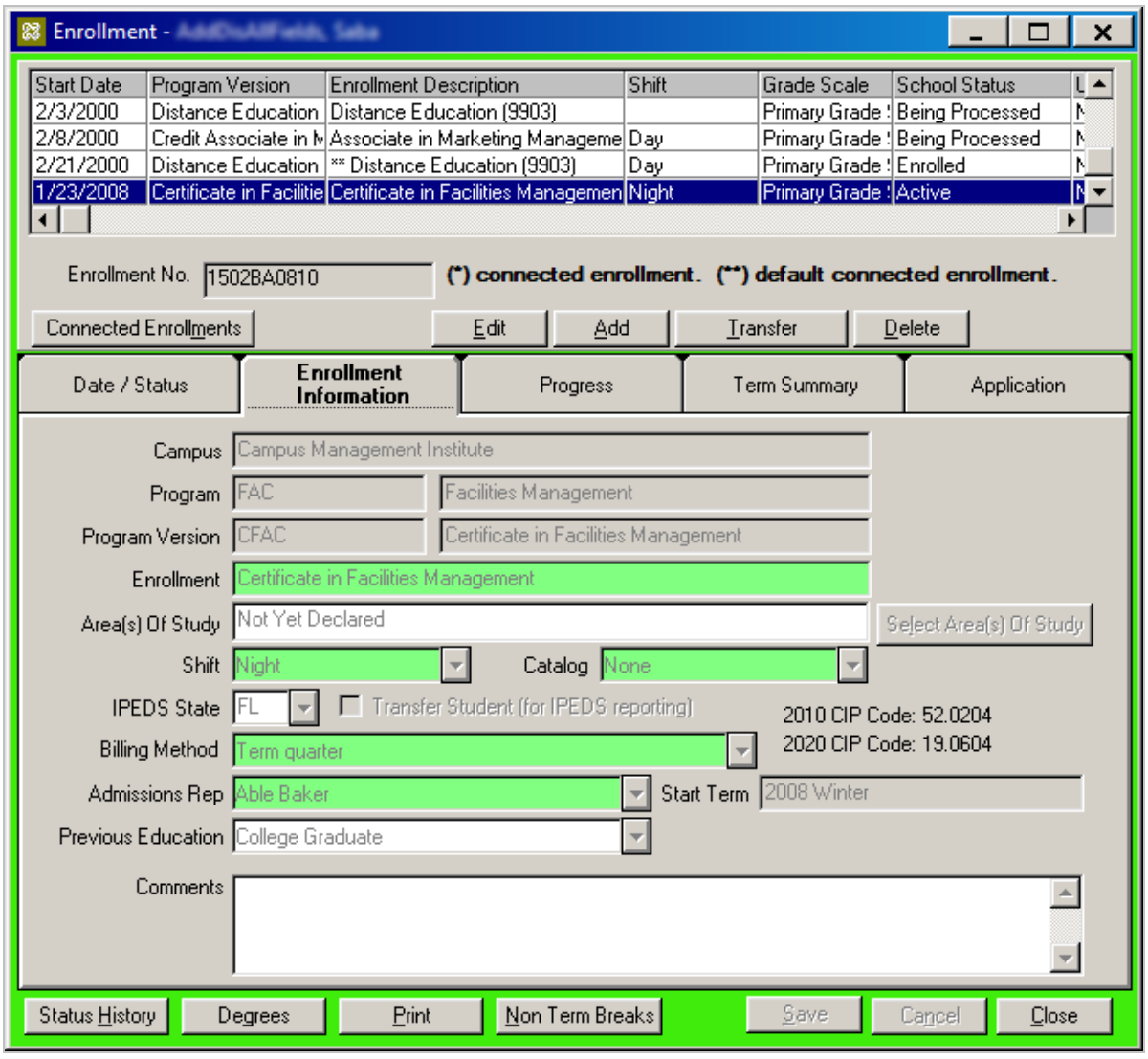
Field	Display/Edit	Description
Extern. Begin Date	Edit	Enter the date that this student began an externship.
Date Billed	Display	This is the date that the student was billed using the billing method set up under the program version in Student Accounts or on this form.
Orig Exp Start Date	Display	This is the original expected start date of the enrollment. The Expected Start date is captured when enrolling a student or upon the completion of the application process. If the student has multiple enrollments, then this date will reflect the original expected start *date* for each enrollment. If the enrollment is transferred then the original student expected start date and this date will be the same.
Orig Exp Grad Date	Display	This is the original expected graduation date at the time of enrollment. This date is frozen.
Orig Student Exp Start	Display	This is the original student expected start date at the time of enrollment. The date is determined at the time of the student's *first* enrollment. This date is frozen. (The date was previously referred to as the Original Expected Start Date).
School Status	Display	This is the student's status in school.
NSLDS Status	Display	The status is assigned by the National Student Loan Data System (NSLDS) to be used for SSCR Processing. The School Status is associated with the NSLDS Status during configuration and an effective date assigned at that time.
Status Date	Display	This is the date of the most recent status change.
Enroll Status	Display	This is the student's enrollment status. Full time, half time, etc. The Enrollment Status (Less than Half Time, Half Time, etc.) for new students (having a school status associated with a system status with a category of Enrolled or NDS Enrolled) will be updated the first time that they register for a class. If the current term has an aggregated enrollment status, that status will populate the Enroll Status field.
Determination Date	Display	This is the date when the student dropped enrollment.
NSLDS Withdrawal Date	Display	This date will be used as the effective date when reporting withdrawal status changes in the SSCR and Clearinghouse Reports. If necessary, this date can be modified using the system tool Edit Student Status History.
Campus	Display	This is the campus at which the student is enrolled.
Refund Process Date	Display	This is the date when the refund (if any) was processed.
Academic Advisor	Edit	Select the staff member who is this student's academic advisor.
Reason	Display	This field shows a reason for the student's enrollment status. It is blank until a manual status change is made.

Enrollment Information

The Enrollment Information tab displays basic information for a selected student's enrollment. You can edit some of the information, but you cannot edit the data maintained by the system. See also Tracking NDS students.

To view or edit the enrollment information:

1. Select a student for whom you want to view or edit the data in the enrollment information tab.
2. Navigate to **View > Academic Records > Enrollment**. The Enrollment form is displayed. CampusNexus Student lists all students enrollments and fills in the form with data from the first enrollment.



3. To edit an enrollment, select it in the top window of the form.

   Note the **Enrollment No.** under the list of enrollments. This is the student's identification number for the highlighted enrollment. All records for this enrollment will be related by this number.

4. Click **Edit** to open the selected enrollment for changes. The fields in the lower pane form that you can edit will

appear with white backgrounds. Fields that are "dimmed" are maintained elsewhere and cannot be edited here.

5. Click the **Enrollment Information** tab.
6. Enter new data or change existing data on the form.
7. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Field Descriptions: Enrollment Information Tab

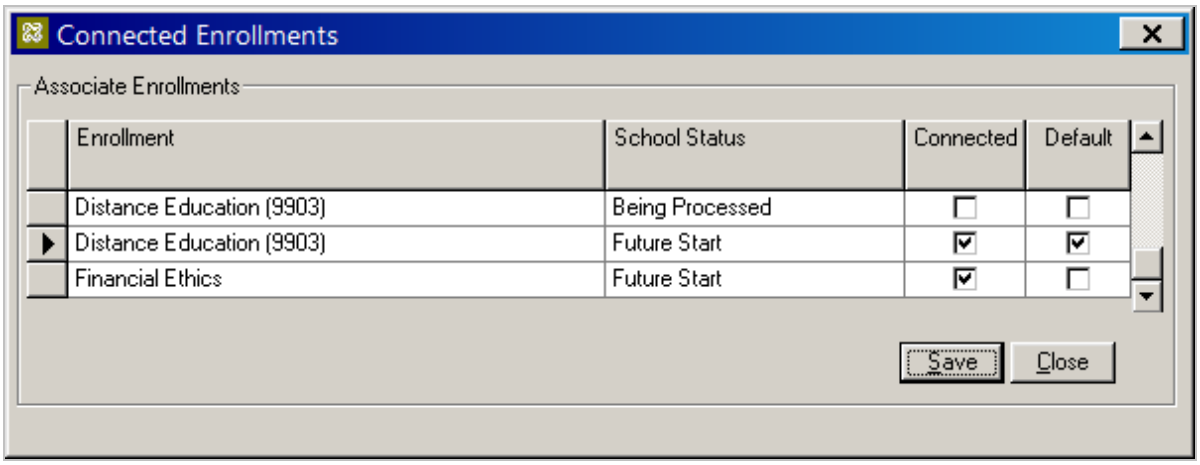
Field	Display/Edit	Description
Enrollment ID	Display	This is the number that was calculated for this student's enrollment by the system from parameters provided by your school.
Campus	Display	This is the campus in which the student is enrolled.
Program	Display	This is the code and description of the program in which the student is enrolled.
Program Version	Display	This is the code and description of the program version covered by this enrollment.
Enrollment	Edit	This is the description of the student's enrollment. By default, the description of the program version is inserted here. You can change it if necessary.
Area(s) of Study	Edit	Use the **Select Area(s) of Study** button to populate this field. Changing this value for a program version configured for Academic Calendar 5 or 6 will trigger a re-evaluation of Academic Year sequences and the credits or hours and weeks values needed to complete the program. The system also captures the end date of the last completed payment period and resets the SPE start date to that date when ever as AOS change is done for a non-term program version.
Shift	Edit	Select the shift that the student is attending for this program version.
Catalog	Edit	Select the catalog that the student is using for this program version.
IPEDS State	Edit	Enter the state identified by the student as his/her permanent address at the time of application to the institution. (The information from this field is also available on the cube report under Daily > Academic Records > Population Analysis / IPEDS Enrollment Survey.)
Transfer Student (for IPEDS reporting)	Display	The logic in the Enrollment wizard determines whether this check box is selected by default, based on whether the student has transfer credits which have a transfer type configured with its "Include as Transfer Student (for IPEDS reporting) check box selected.
Billing Method	Edit	Select the method used to bill the student-monthly, term, course, etc.
2010 CIP Code and 2020 CIP Code	Display	See Associate CIP Code with Program for details.
Admissions Rep	Display	This is the admissions rep assigned to the student.

Field	Display/Edit	Description
Start Term	Display	After selecting the start term field when adding an enrollment to the student record, the selected start term field will display on this form.
Comments	Edit	Enter comments about the enrollment.

Connected Enrollments

For students who are seeking dual degrees, provides the ability to connect enrollments from a list of non-permanent out enrollments (active/future enrollments) and set a default among the connected enrollments.

1. Click the **Connected Enrollments** button. The Connected Enrollments form is displayed.



2. Select the two enrollments that you would like to connect by selecting the **Connected** column of the appropriate enrollment.
3. Select the **Default** column of the enrollment you would like to set as the default enrollment.

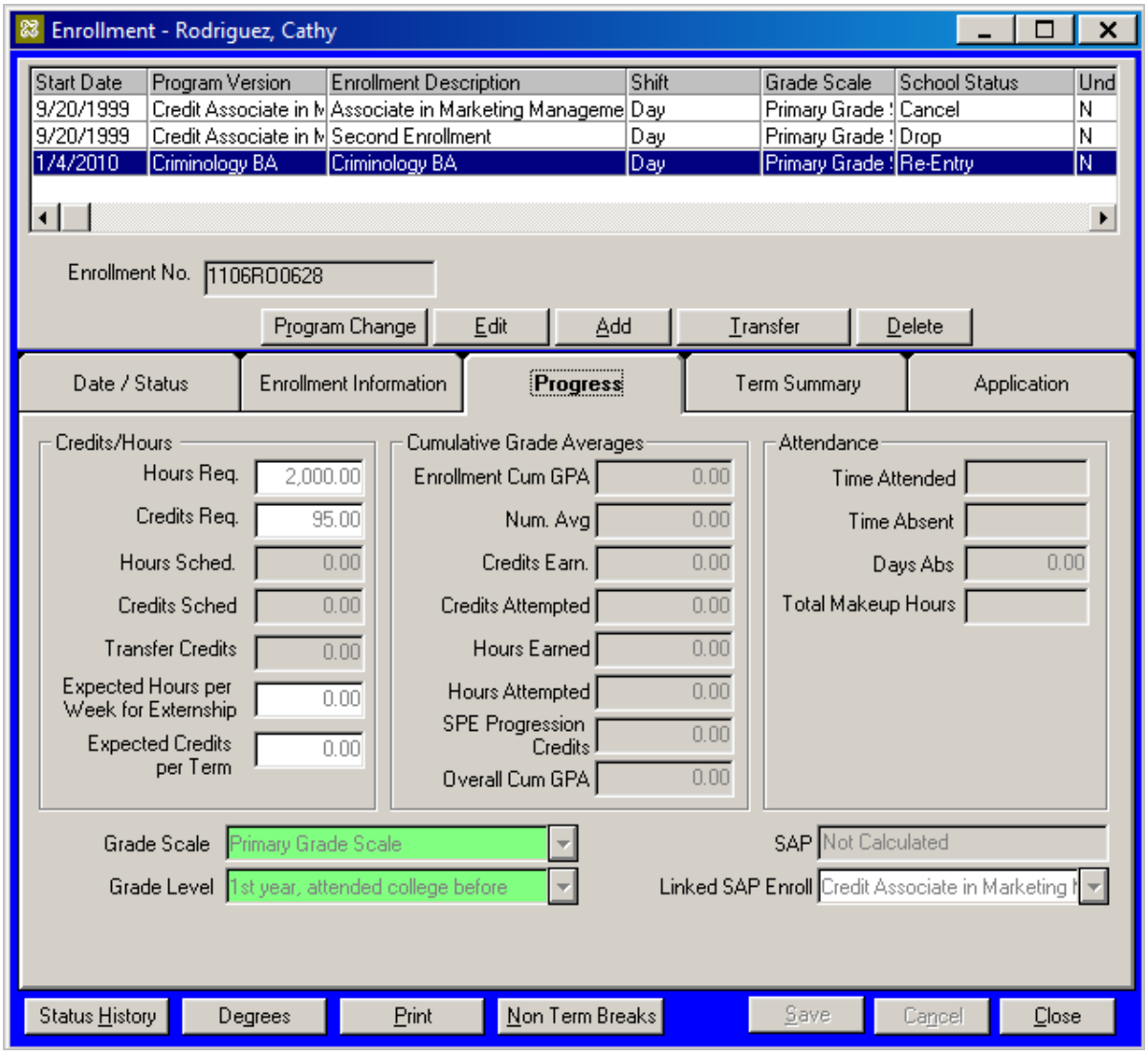
   If you do not select a default enrollment , the following message is displayed when you click Save: *"One of the selected enrollments must be specified as the default enrollment."*
4. Click **Save**.
5. A confirmation message is displayed. Click **OK**. You are returned to the Enrollment Information form.

Progress

The Progress tab shows summary enrollment data related to Credits-Hours, Cumulative Grade Averages, and Attendance. You can also select the student's grading scale and grade level.

To view or edit the enrollment progress information:

1. Select a student for whom you want to view or edit the data in the grade summary tab.
2. Navigate to **View** > **Academic Records** > **Enrollment**. The Enrollment form is displayed. The program lists all of the student's enrollments and fills in the form with data from the first enrollment.



3. To edit an enrollment, select it in the top window of the form. Note the **Enrollment No.** under the list of enrollments. This is the student's identification number for the highlighted enrollment. All records for this enrollment will be related by this number. There is a different number for each enrollment.
4. Click **Edit** to open the selected enrollment for viewing or changes. The editable fields on the form have white (or your required fields color) backgrounds. Fields that are "dimmed" are maintained elsewhere and cannot be edited

here.

5. Click the **Progress tab**.

   Tip! Double-click the Progress tab to recalculate the values on this page of the form.

6. Enter new data or change existing data (Hours Required, Credits Required, Expect Hours/Week Internship, Expected Credits/Term, Grade Scale, Grade Level only) on the form.
7. Click **Save** to save your changes.
8. Click **Close** to close the form.

Refer to the table below for a description of the data fields on the Enrollment form, Progress tab.

Field Descriptions: Enrollment Form Grade Summary

Field	Display/Edit	Description
Enrollment No.	Display	This number is calculated by the system for this student's enrollment parameters provided by your school.
Credits / Hours		
Hours Req.	Display	This is the total hours required for completion of the enrollment (program version). Changing this value for a program version configured for Academic Calendar 5 will trigger a re-evaluation of Academic Year sequences and the hours and weeks values needed to complete the program. If a credit hour non term program is using clock to credit conversion, then changing this field will drive the AY/LP adjustment evaluation. Staff Group field-level security may be established for the field.
Credits Req.	Display	This is the total credits required for completion of this enrollment (program version). Changing this value for a program version configured for Academic Calendar 6 will trigger a re-evaluation of Academic Year sequences and the credits and weeks values needed to complete the program. If a credit hour non term program is using clock to credit conversion, then the Hours Req. value will drive the AY/LP adjustment evaluation. Staff Group field-level security may be established for the field.
Hours Sched.	Display	This is the number of hours currently scheduled in this enrollment.
Credits Sched	Display	This is the number of credits currently scheduled in this enrollment for the current term.
Transfer Credits	Display	If the student if enrolled in a credits based program version, the field is labeled *Transfer Credits* and the total number of transferred credits is displayed. If the student if enrolled in a clock hours based program version, the field is labeled *Transfer Hours* and the total number of transferred hours is displayed.

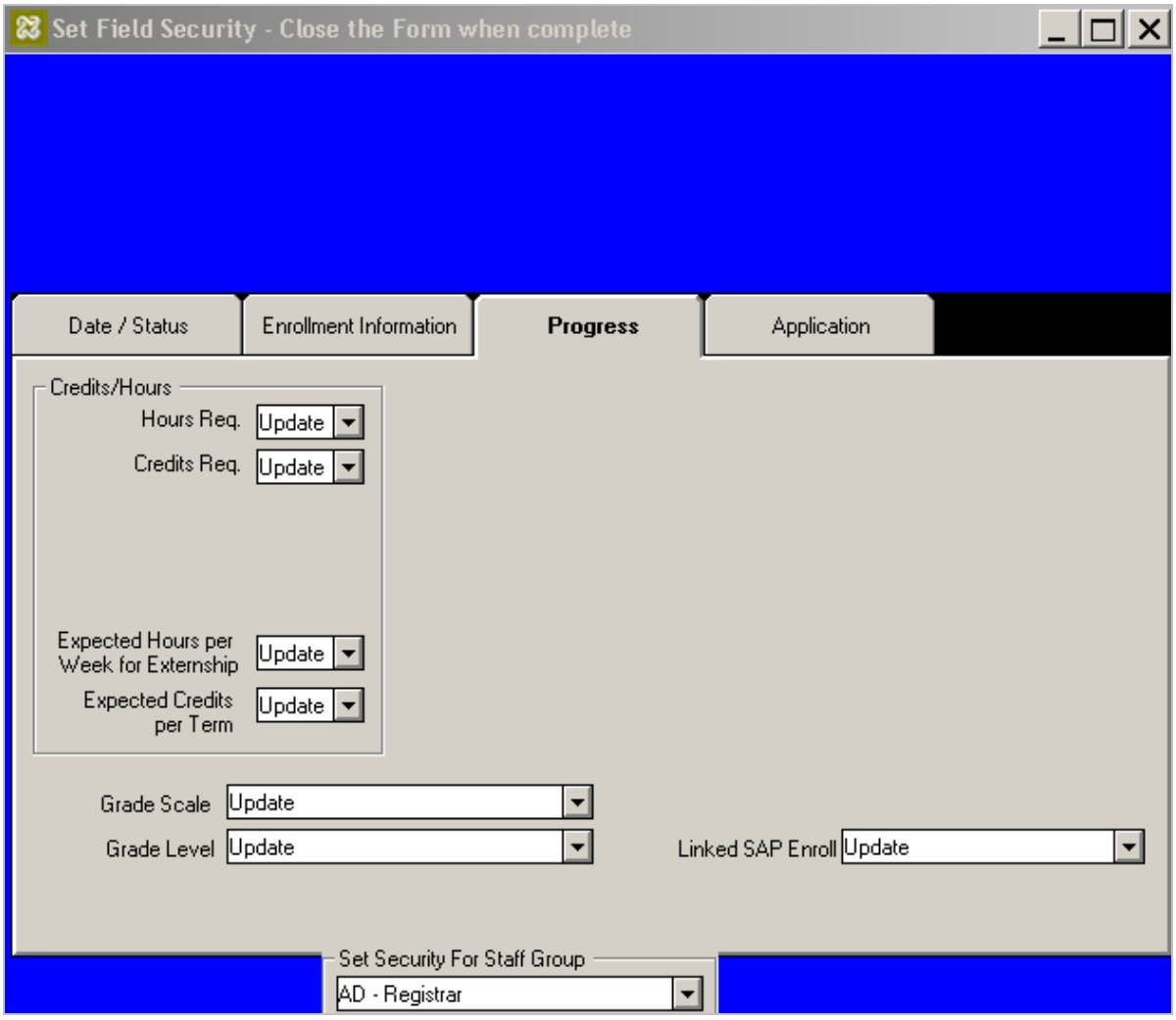
Field	Display/Edit	Description
Expected Hours per Week for Externship	Edit	This field will only be used in the graduation date calculation if the student is enrolled in an Externship course. The value entered must be less than the *Total Hours for Externship* entered when configuring the program version. Staff Group field-level security may be established for the field.
Expected Credits per Term	Edit	Enter the total number of academic credits that the student is expected to complete per term. This value can also be entered when configuring the program version. This value is displayed in the Term Sequencing Enroll Course List form. Staff Group field-level security may be established for the field.
Outside Coursework Hours	Edit	Enter in 5 minute increments as expressed in hour decimals (e.g. 10 minutes is 0.17 hours). This text box is only visible when the Clock to Credit option is ON for the enrolled program version.
FA Credits	Edit	This field is used for measuring progression as well as adjusting Academic Year and Loan Period sequences if the total FA credits for a program version is different than the Academic Credits. This field is available for programs configured to use Academic Calendar 6 if “Allow Course to be exempt from Progression” is enabled. During enrollment this field is populated from the corresponding field on the Financial Aid configuration form for the Program Version.
Cumulative Grade Averages		
Enrollment Cum GPA	Display	This is the student's cumulative grade point average at this time in the selected enrollment. The information from dropped courses is included.
Num. Average	Display	This is the current numeric average of class sections graded for this student. If your school does not use numeric grading, this will be zero.
Credits Earn.	Display	This is the number of credits earned by the student to date.
Credits Attempted	Display	This is the number of credits attempted by the student to date.
Hours Earned	Display	This is the number of hours earned by the student.
Hours Attempted	Display	This is the number of hours attempted by the student.
Total FA Hours	Display	This is the sum of Hours Req. text box + Outside Coursework Hours text box value. This text box is only visible when the Clock to Credit option is ON for the enrolled program version.
SPE Progression Hours	Display	This is the number of hours completed by a student using Academic Calendar 5 or 6. This field is updated manually, or when a grade change (final grade is posted, or if grade change from Pass to Fail or Fail to Pass) occurs for the student.
SPE Progression Credits	Display	This field displays the total number of credits applying toward the completion of the enrollment. When “Allow courses to be exempt from progression” is enabled, this field holds the total of the Enrollment status credits that apply to completion of the program.

Field	Display/Edit	Description
Attendance		
Time Attended	Display	This is the number of hours attended by the student.
Time Absent	Display	This is the number of hours that the student was absent from class.
Days Absent	Display	This is the number of complete days that the student was absent from school.
Total Makeup Hours	Display	This is the number of makeup hours accumulated by the student.
Grade Scale	Edit	Select the grade scale to be used for this enrollment from the list.
Grade Level	Edit	Select the grade level of the student from the list.
SAP	Display	This field indicates that the student is or is not making Satisfactory Academic Progress. It also indicates that SAP has not yet been calculated for the student.
Linked SAP Enroll	Edit	This field displays the previous permanent out enrollment that was linked to the selected enrollment for SAP calculation. **Note**: Users with *Edit* security permissions, and *Update* Field-Level Security can add/delete/change the SAP link. Any time a change is made to this field, a message is displayed stating *SAP will not be recalculated as a result of this change. If corrections to historic SAP records are needed, please re-run SAP manually for the student.* In addition, changes to this field are captured in the Admissions Audit.

Staff Group Field-Level Security for Progress fields

While the Progress tab is open, select **Setup > Field-Level Security**. The **Set Field Security** form is displayed. Staff Groups can be assigned that are permitted to Update the fields shown on the form. Other options for the fields are *None* or *Display*.

- If *None* is selected, the field is not displayed for the Staff Group selected.
- If *Display* is selected, the Staff Group can view the field, but may not edit it.


Set Field Security - Close the Form when complete
Date / Status
Enrollment Information
Progress
Application
Credits/Hours
Hours Req.
Update
Credits Req.
Update
Expected Hours per Week for Externship
Update
Expected Credits per Term
Update
Grade Scale
Update
Grade Level
Update
Linked SAP Enroll
Update
Set Security For Staff Group
AD - Registrar

Total Attended Hours for Clock Hour Programs

Total Attended Hours data is available in multiple areas of the application, as derived from the cumulative minutes attended and minutes absent (Enrollment Schedule table for courses) and the total program hours (Progress tab of the Enrollment folder).

Basis

The display of Total Attended Hours for a Clock Hour program is based on the following features of CampusNexus Student:

Attendance Summary: Designation referring to the Attendance section of the Progress tab on the Enrollment form in CampusNexus Student. It contains the following 4 fields (for a more detailed description of these fields, see Progress):

- Time Attended
- Time Absent
- Days Absent
- Total Makeup hours

Total Attended Hours: A field on the Customized User Toolbar that shows the total hours attended by the student for the current enrollment, if the program is a Clock Hour program. The Total Attended Hours are displayed in the format **## h ## m**. See also Enabling the Display of Total Attended Hours.

Notes:

- The Total Attended Hours field will be empty for Non-Clock Hour programs.
- The Total Attended Hours field is visible only if the Customized User Toolbar has been turned on in CampusNexus Student.

Effects of Course Association/Unassociation

The characteristics below apply to both the Time Attended field in the Enrollment folder (Progress tab) and the Total Attended Hours field on the Customized User Toolbar. The latter uses the hours from the Enrollment folder, hence the statements are valid for both.

- The Total Attended Hours field on the User Toolbar and the Attendance Summary on the Enrollment folder include hours from associated courses.
- CampusNexus Student updates the attended hours for a given enrollment for each new course association that occurs in the system, manually or automatically.
- When a course is associated, any Makeup Hours, Absent Hours and Days Absent for the associated course are also included in totals for the associated enrollment.
- If a course is unassociated, the Attended Hours, Makeup Hours, Absent Hours and Days Absent are deducted from the totals for the associated enrollment.

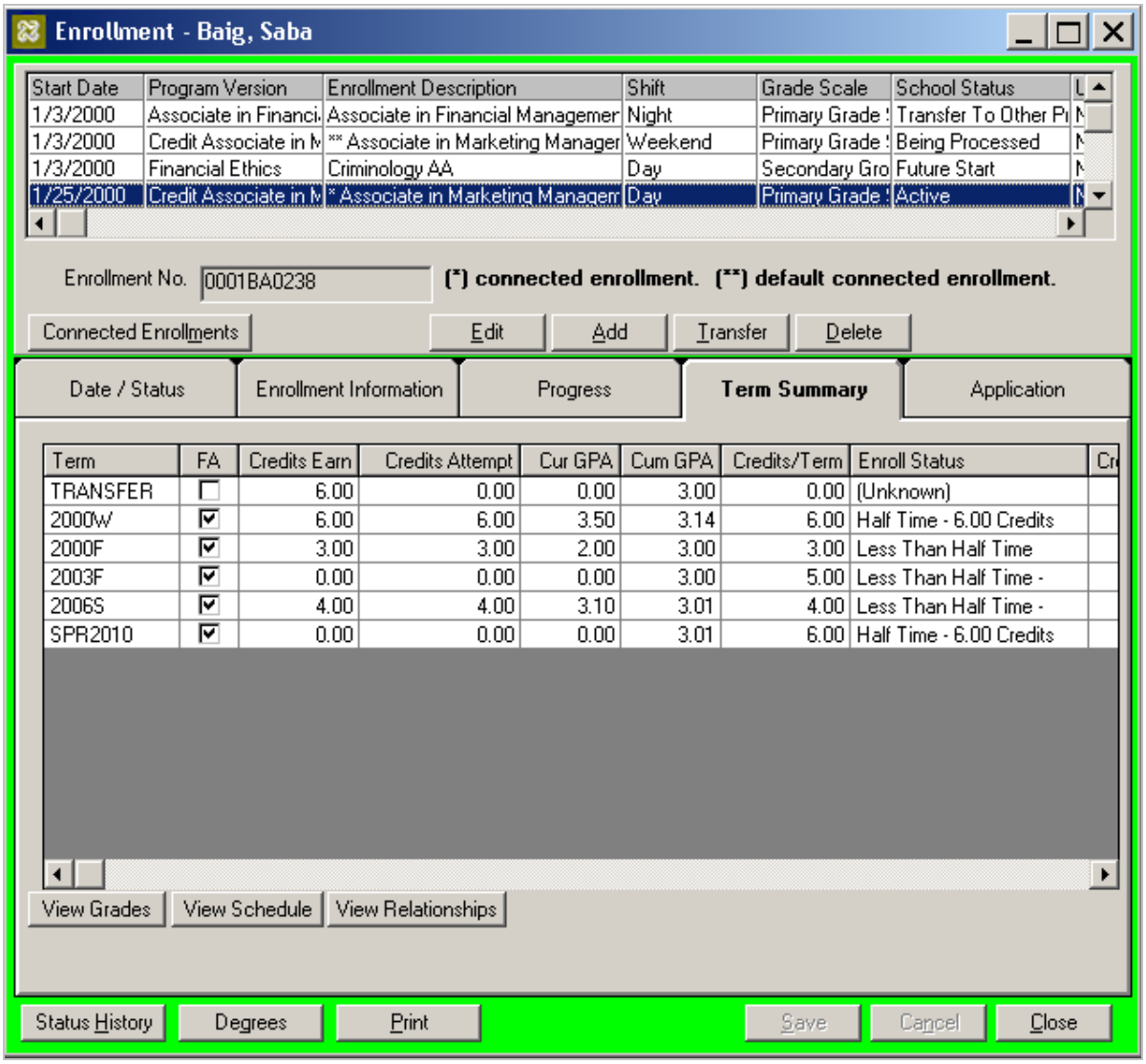
Term Summary

Term summary information for a selected student's enrollment is shown on this tab. There is one row on the grid for each term the student is in school. Data on this form is maintained by CampusNexus Student. You cannot edit data maintained by the system.

When SAP is run by Term, if a student's Term GPA is 0.00 because all courses are configured to not be included in the GPA, SAP will ignore evaluating the Term GPA criteria.

To view the term summary information:

1. Select a student for whom you want to view the data in the term summary tab.
2. Navigate to **View > Academic Records > Enrollment**. The Enrollment form is displayed. A list of all the student's enrollments is displayed.

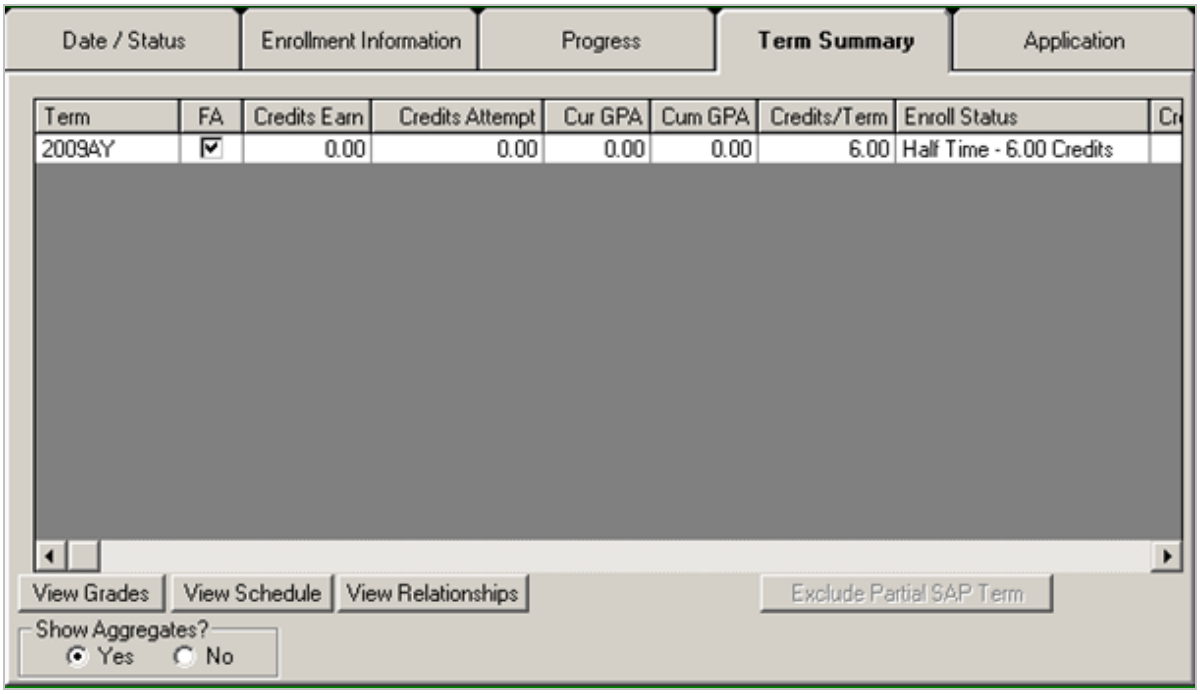


3. To view or edit an enrollment, select it in the top window of the form. Note the **Enrollment Number** under the list of enrollments. This is the student's identification number for the highlighted enrollment. All records for this enrollment

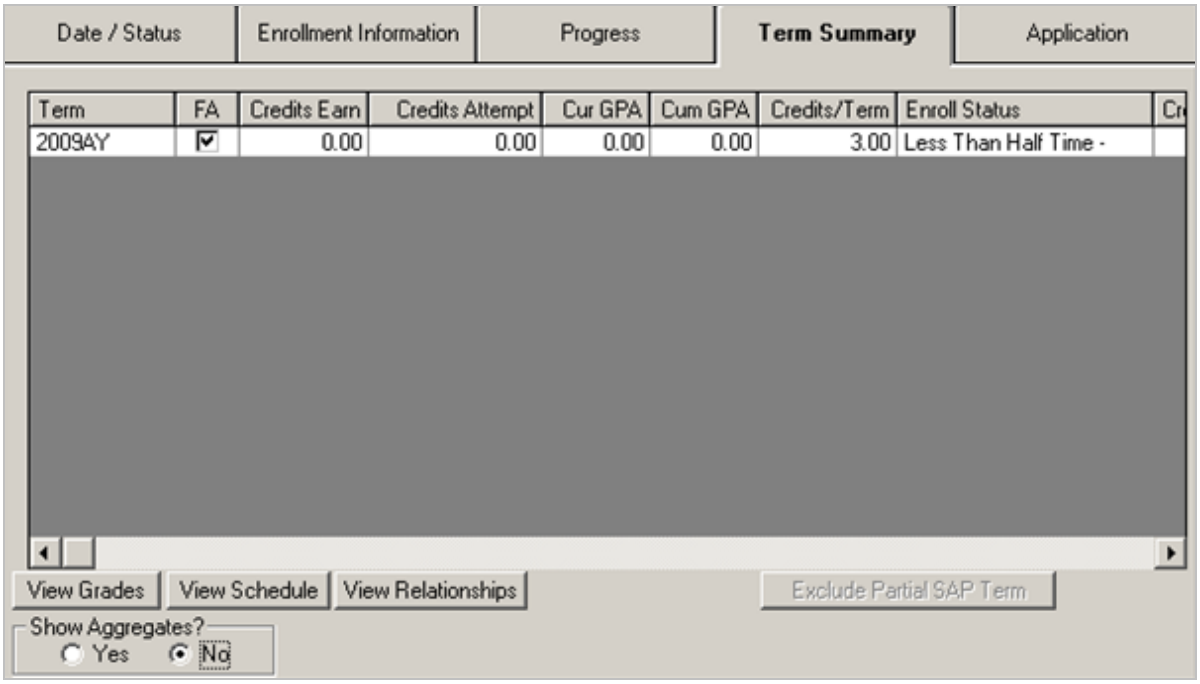
will be related by this number. There is a different number for each enrollment.

4. Click the **Term Summary tab** to view the term summary for each term attended by the student.
5. Click **View Grades** to see the student's Grades.
6. Click **View Schedule** to see the student's Schedule.
7. Click **View Relationships** to see the term's relationships to parent or child terms.
8. Click **Rebuild Relationships** to rebuild the parent child relationships. This button will only be shown when at least one of the terms in the student's term summary has a term relationship configured.
9. Click **Exclude Partial SAP Term** to exclude a selected term in the term summary from the term sequence calculation. This provides the ability to designate the selected term as a Partial SAP Term. This button will only be shown when the Partial Term Validation feature is turned on in the SAP policy defined for the student's program version and the user has permission to exclude Partial SAP Terms.
10. Select the **Show Aggregates?** option to display an aggregated enrollment status when there are terms shared across both enrollments.

    When **Yes** is selected, the grid on this form shows aggregated values in the Credits/Term and the Enroll Status columns. When terms are shared across both enrollments, Yes is the default value.



    When **No** is selected, the grid on this form displays non-aggregated values. This option is visible only if the enrollment being viewed is or has ever been connected to another enrollment.



11. Click Status History to see the student's status history.
12. Click Degrees to see the student's degrees, honors, and comments.
13. Click **Close** to close the form.

Refer to the table below for a description of the data fields on the Enrollment form, Term Summary tab.

Note: If the student is enrolled in a clock-hour program, the column headers are changed for the clock-hour values. The amount of credits or clock-hours shown for a term on this form includes the sum of all credits or hours for this term and any related child terms (click **View Relationships** to view all related terms to the selected term).

Field Descriptions: Enrollment Form Attendance and Status

Field	Display/Edit	Description
Enrollment Number	Display	This is the number that was calculated for this student's enrollment by the system from parameters provided by your school.
Term	Display	This is the code for the term on the row.
FA	Display	This check box represents whether the student is receiving Financial Aid for the particular term displayed in the Term column.
Credits Earned	Display	This is the number of credits earned by the student during this term. For clock-hour schools this column will show hours earned.
Credits Attempted	Display	This is the number of credits attempted by the student during this term. For clock-hour schools this column will show hours attempted.
Current GPA	Display	This the student grade point average for the term on this row. The information from dropped courses will be included.

Field	Display/Edit	Description
Cum GPA	Display	This is the student's cumulative grade point average for all terms listed. The information from dropped courses will be included.
Credits/Term	Display	This is the number of credits registered for the selected term & enrollment.
Enroll Status	Display	This is a calculated sum of enroll status credits or enroll status hours (depending on the program version's setting for credit or clock hour) for the term and enrollment selected. The total is then compared to the enroll status minimums defined on the program version. (The total enroll status number may not always match the academic credits/hours total in the Credits/Term column.)
SAP Status	Display	This is the status of the student's SAP.
Honors	Display	This is an honor awarded to the student during the selected term. For instance, "Dean's List".
Term Confirmation	Display	This is the status of Term Confirmation settings for a student.
Blind Grade ID	Display	This is the blind grade ID that corresponds to the term on the same line for the selected student. The blind grade ID is used in place of the student's name.

Excluding Partial SAP Terms

A student's schedule may include a Partial Term which occurs when a student takes a course before the first full term. For example, a student starts at the midpoint of a term and only takes one or two courses. Since the term is short and the credit load is small, the school may not wish to include the courses taken in that term as part of the student's SAP calculations. For this purpose CampusNexus Student provides the **Validate Partial Term** feature. When this feature is turned on, a partial term is determined using the following logic:

- The student's earliest registered course start date for the SAP term being evaluated is equal to the student's **version start date**

  AND is greater than the start date of the term the registered course is associated with (for schools not using term relationships)

  OR is greater than the start date of the parent term of the term the earliest registered course is associated with (for schools using term relationships).

- The student's earliest registered course start date for the SAP term being evaluated is equal to the student's **re-entry date**

  AND is greater than the start date of the term the registered course is associated with (for schools not using term relationships)

  OR is greater than the start date of the parent term of the term the earliest registered course is associated with (for schools using term relationships).

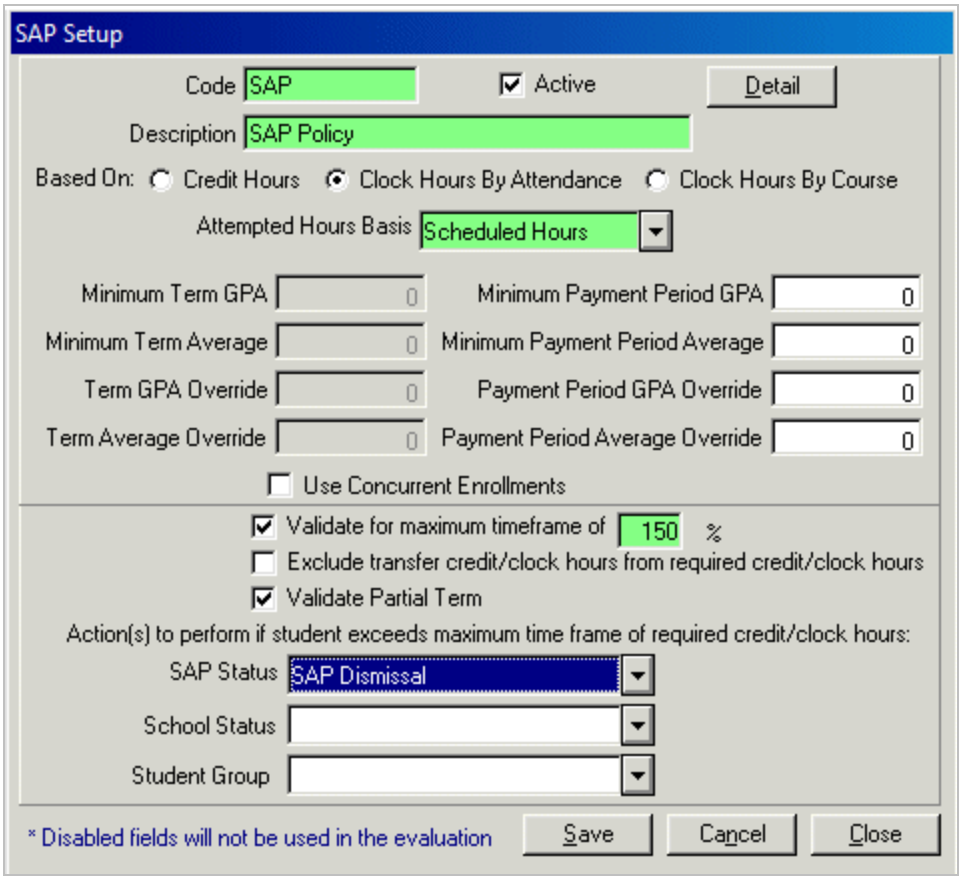
When the logic above determines that a student has taken a partial term, the partial term is not included in the student's SAP calculation.

If a school uses partial terms the school may wish to exclude a partial term from the general SAP calculation. This can be manually configured for each student from on the Term Summary tab of the Student Enrollment form. Once a term has been flagged as a Partial SAP Term, it is no longer be included in the SAP calculations.

This feature must be enabled as part of the SAP code setup.

To enable the validation of a partial SAP Term for a specific SAP Code:

1. Navigate to **Lists > Academic Records**.
2. Select the applicable **tab**, or click the **Go To** button, click and select **SAP**. The existing SAP codes are displayed on the grid.
3. Select a line and click **Edit** to view or change it. The **SAP Code Setup** form is displayed.



4. Select the **Validate Partial Term** check box.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

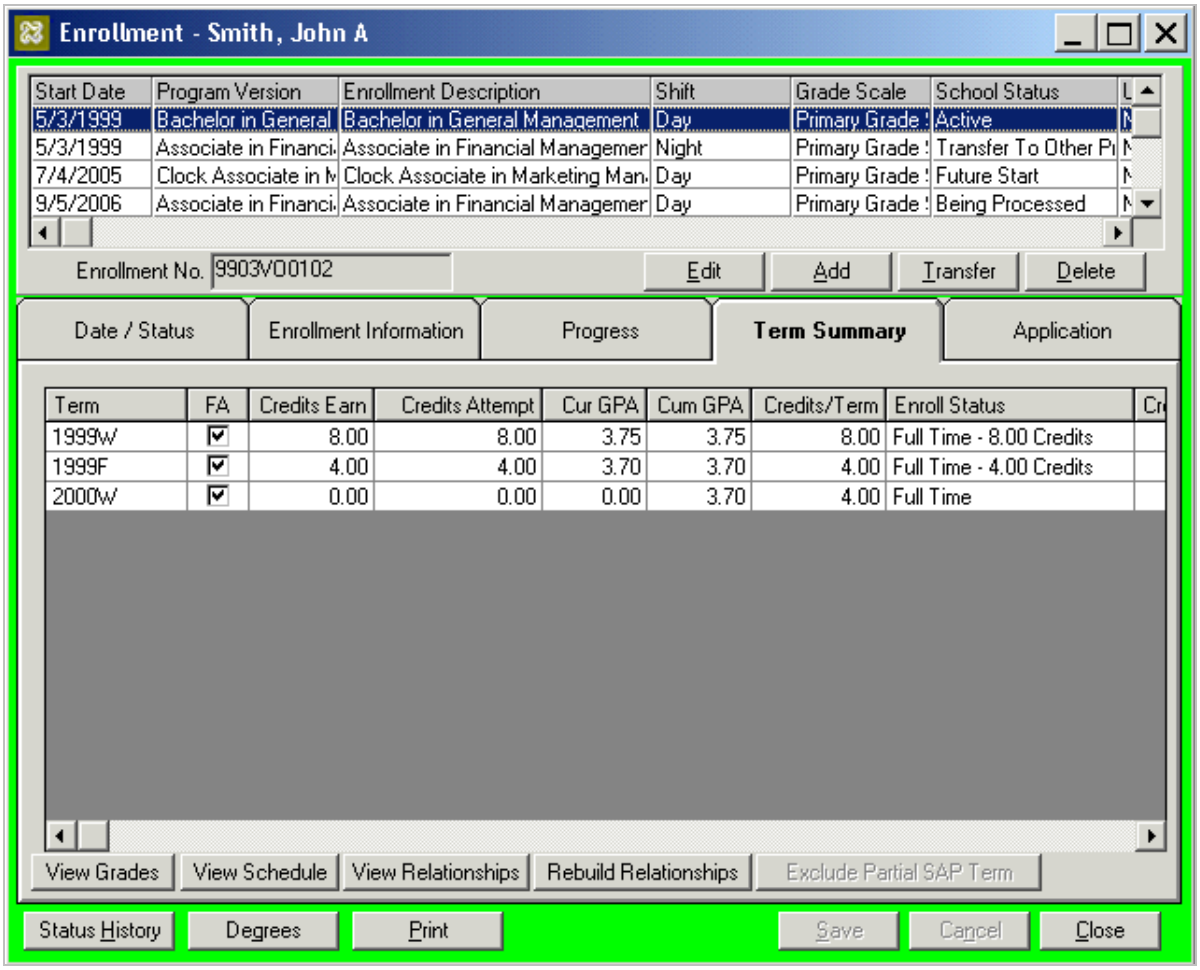
This should be done for each SAP Code for which you want to be able to exclude Partial SAP terms.

Configuring Partial Term SAP for a Student

To manually configure Partial Term SAP for a student, the system administrator must have enabled this feature on the system for the staff member or group member.

To configure one or more SAP Partial Terms for a student:

1. Select a student whose enrollment contains the terms that you want to configure.
2. Select **View > Academic Records > Enrollment.** The Enrollment form for the selected student is displayed.
3. To view or edit an enrollment, select it in the top window of the form.
4. Click the **Term Summary** tab.

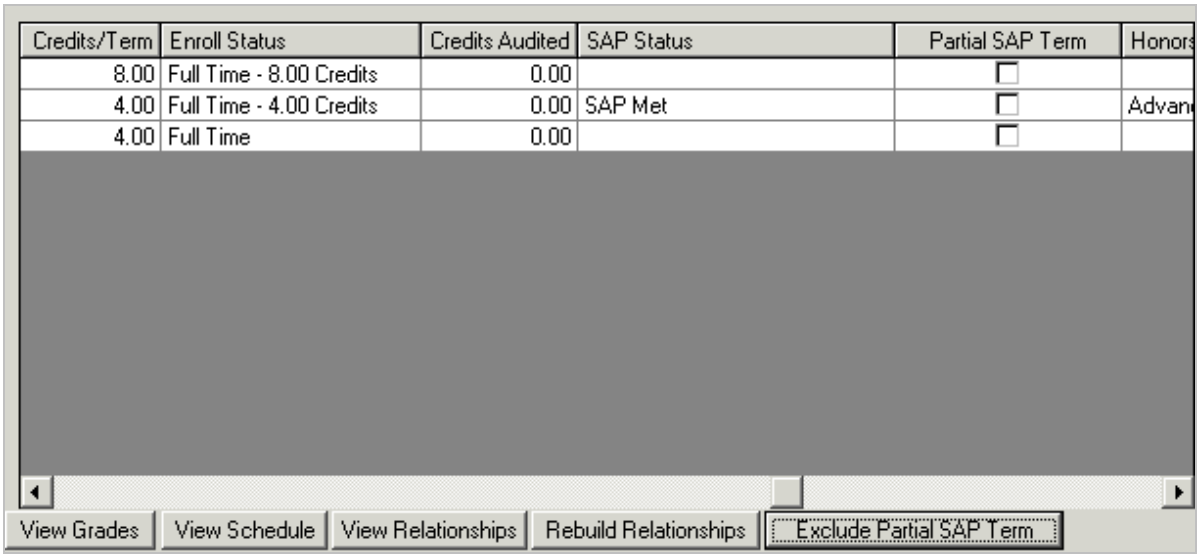


5. Click **Edit**. Since the form is displayed with focus on the **Date/Status** tab.
6. Click the **Term Summary** tab again. The **Exclude Partial SAP Term** button should be enabled.

   If the button is not enabled or visible, this means that:

   - The user does not have system permission to exclude partial SAP terms.
   - The Partial Term Validation feature is turned off in the SAP Code defined for the student's program version.
7. Using the slider at the bottom of the form, move the grid so that the **Partial SAP Term** check box is visible.

   If the term is a Partial Term for that student, the **Partial SAP Term** check box is selected.



8. Click the row representing the term that you want to flag as a Partial SAP Term.
9. Click the **Exclude Partial SAP Term** button. The Partial SAP Term check box is now selected.

   Note: The **Exclude Partial Term** button is now labeled **Include Partial Term**. This enables you to deselect the check box.
10. Repeat the previous steps for each term that you want to exclude from the SAP calculation.
11. Click **Save** when you have completed editing of the partial SAP Terms.

    Note: As the screen is re-displayed after saving, it may display a different enrollment. Simply re-select the desired enrollment.

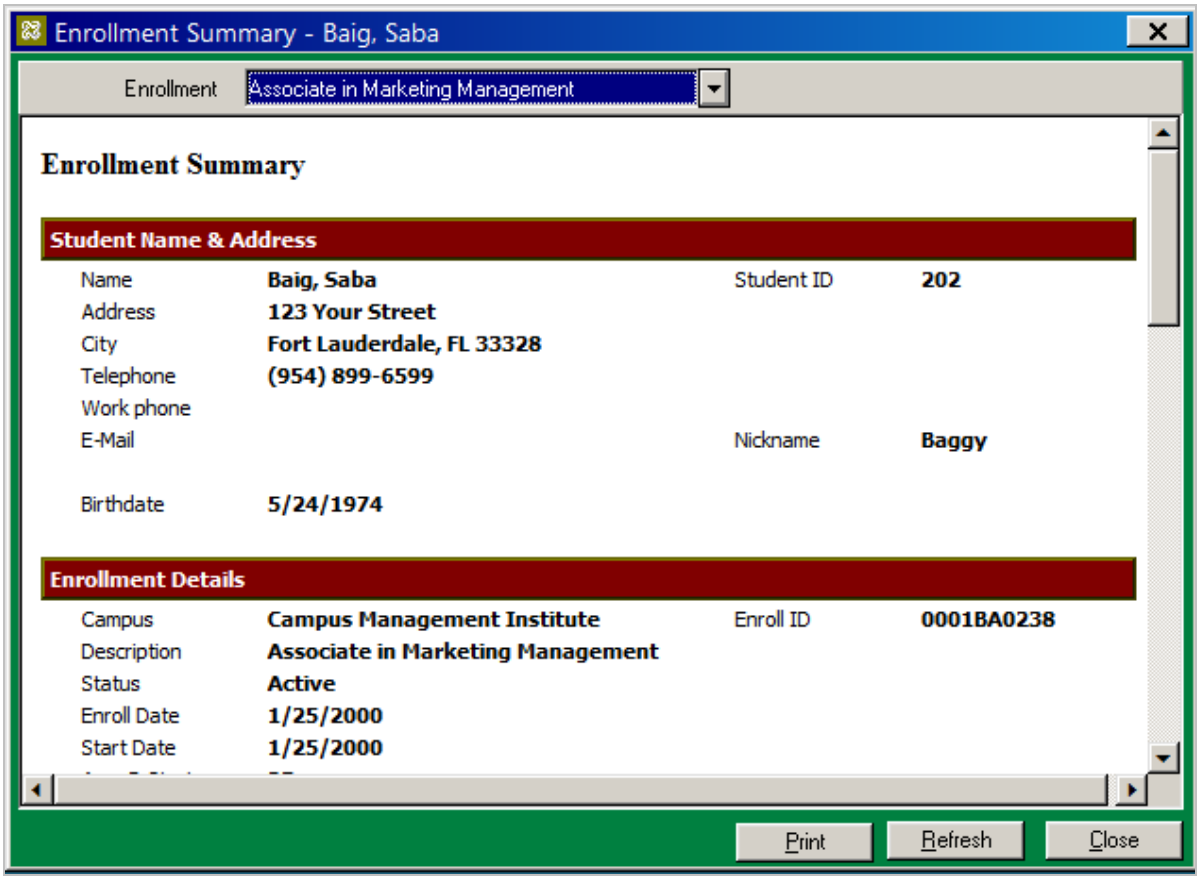
When the SAP calculation is performed, it will exclude all terms as part of the SAP term sequence calculation which contain a check in the **Partial SAP Term** check box.

Enrollment Summary

The Enrollment Summary option displays an html-style report that lists enrollment data about the selected student.

To view the Enrollment Summary:

1. Select a student.
2. Navigate to **View > Academic Records > Summary**. The Enrollment Summary for the selected student is displayed.



3. Select the **Enrollment** for which you want to view the summary.
4. Click the **section headers** on the report to bring up the related maintenance form. The sections on this report include:
    - Student Name and Address
    - Enrollment Details
    - Billing Address
    - Schedule of Fees
    - Account Summary
    - Registration
5. Click **Print** to print a report of the Enrollment Summary.

6. Right-click on the report to view a shortcut menu. to perform other actions.
7. Click **Close** to close the form.

Schedule

When a student is enrolled in a program version, all core and elective courses set up for the program version are copied into the student's schedule. The Student Schedule form is used to enter and maintain a student's class schedule. You can filter the class schedule by enrollment, term, registration group, and student status. You can create a unique schedule or modify a class schedule for each enrollment. The list of classes shown on the form can be displayed showing schedule information or grade information.

Shared courses appear on the Course Schedules of all participating campuses. For example, if a campus shares on-line courses with an on-ground campus, the report displays courses for both types of campuses. Additionally, the number of available seats are displayed. The Registrars have override capability for courses and seats available for their campuses but not for courses shared from other campuses.

Note: If an institution is a "Clock Hour" school, the clock hour information is used to calculate GPAs and Tuition Billing.

You can perform the following tasks from the Student Schedule form:

- Add class sections to the schedule
- Delete class sections from the student's schedule
- Drop a student from a class section

  Be sure to note the difference between *dropping* the student from the class section which can result in a grade action, and *deleting* a class section from the student's schedule which removes the class from the student's records.

- Edit class sections
- Reinstate a student
- Register a student in a class
- Register a student in multiple class
- Reassign a class
- Allow the course to be considered as a Retake
- Transfer a student to another class section
- Associate completed or dropped courses with other enrollments
- Work with the student's registration groups

You can also print the class schedule, enter and edit lesson information, enter and edit attendance, print a list of the scheduled classes, and print labels.

Remedial courses may be posted to the student's schedule when minimum test scores are not met during the admission or academic enrollment process.

Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

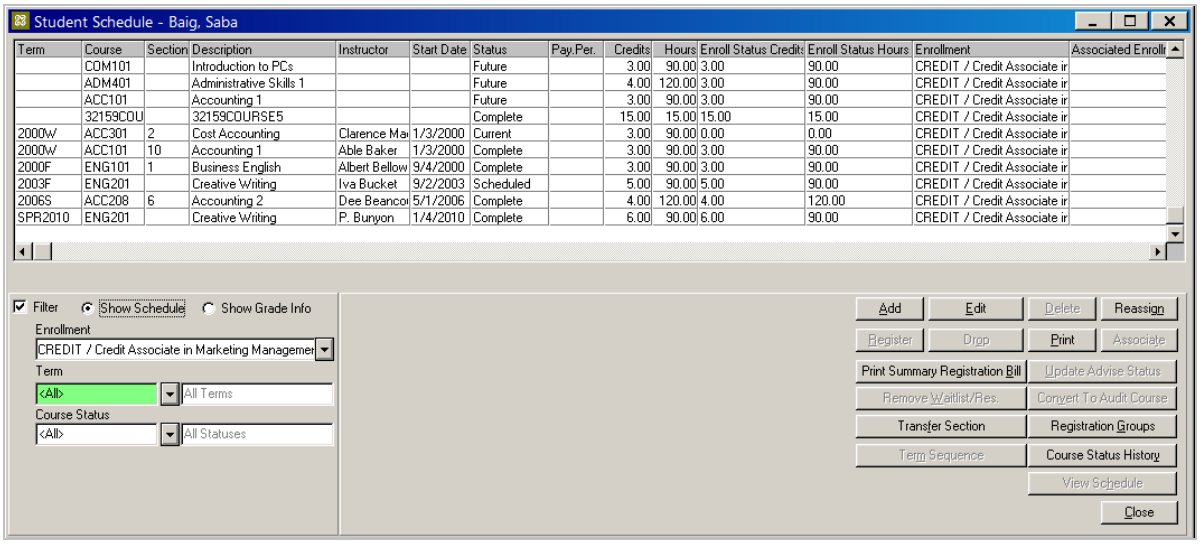
To work with the Student Schedule form:

1. Select a student.
2. Navigate to **View > Academic Records > Schedule**. The Student Schedule form is displayed.

   Note: You can resize the Student Schedule form.

   If a student's enrollment is associated with Major, Minor, or Concentration, an additional column – Areas of Study – is displayed between the Section and Description columns. This column identifies the student's Major, Minor, and/or Concentration.

If a value is displayed in the Catalog Code field, the Student Schedule will show the Catalog Code for the course. If there is no value in Catalog Code, it will show the Code.



3. Select a filter option: **Show Schedule** or **Show Grade Info**. These options change the columns displayed in the grid as follows:

Columns for Show Schedule/Show Grade Info

Columns	Show Schedule	Show Grade Info
Term	Yes	Yes
Course	Yes	Yes
Section	Yes	Yes
Description	Yes	
Instructor	Yes	
Start Date	Yes	
Status	Yes	
SPE	Yes	Yes
Pay.Per.	Yes	Yes
Credits	Yes	
Hours	Yes	
Grade		Yes
Numeric Grade		Yes
Points		Yes

Columns	Show Schedule	Show Grade Info
Credits Earned		Yes
Status		Yes
Enroll Status Credits	Yes	Yes
Enroll Status Hours	Yes	Yes
Enrollment	Yes	Yes
Associated Enrollments	Yes	Yes
Campus	Yes	Yes
Delivery Method	Yes	Yes
Outside Course work Hours	Yes	Yes
Total FA Hours	Yes	Yes

Note 1: The SPE column indicates how the course is evaluated in the Student Pace Evaluation (SPE) tool:

- Y - Indicates that the course is included in progression.
- N - Indicates that the course is excluded from progression.
- R - Indicates that the course reduces the Academic Year/Loan Period.

Note 2: The Outside Coursework Hours and Total FA Hours columns are only visible when the Clock to Credit option is ON for the enrolled program version.

- When CEFP Configuration is ON, Total Fa Hours = Outside Coursework Hours + Enroll Status Hours.
- When CEFP Configuration is OFF, Total Fa Hours = Outside Coursework Hours + Earned Hours when final grade was posted, otherwise Schedule Hours.

For more information, refer to Allow courses to be exempt from progression.

4. Filter the list of courses by selecting the **Enrollment**, **Term**, and **Status**.

   Course Status changes:

   - When a course is added to a student's course list, its status is set to '*Future*'.
   - When the student is registered in a class section for the course, the status is changed from '*Future*' to '*Scheduled Future*'.
   - When attendance is first posted for the student in the class section, the status is changed from '*Scheduled Future*' to '*Current*'.
   - When a final grade is posted for the student, the status is changed from '*Current*' to '*Complete*'.
   - The 'Current' status can also be changed to '*Leave of Absence*' or '*Dropped*' as required.

   Any Course Status changes are retained and posted to the Audit folder within the Course Status Change Audit tab.

5. Click **Print** to obtain any of following reports about the selected student.

   - Schedule
   - Attendance

- Lesson Status
- Lesson Labels

When you choose the Schedule, the Student Schedule Report Selection Criteria form is displayed. Select **Book Information** or **Book Information with Price Information**. This report provides information about the required textbooks and other reference materials required for the course. Book Information includes the Book Name, ISBN Number, Author, Publisher, Copyright Year, Edition, the Required book flag (Yes or No), and Comment (if configured to be visible on student reports and online). Pricing Information is displayed when the Book Information with Price Info option is selected.

The Student Schedule Report also includes comments that have been entered for individual class sections. These comments are in addition to the comments that can be entered for all student schedules at Setup > Campus Locations > Academic Records Tab.

The Student Schedule Report also includes "Dependent" class sections scheduled for a student. The sort order for the report is student name, term, and day of the week. The report uses grouping that requires this sort order.

6. Click **Print Registration Bill** to print the registration bill. When printed from the schedule, the expected funding is printed for the single term selected. The report reflects the individual student using the registration bill defaults setup for the campus and the single term selected by the user on the student schedule. If the campus default is set up to print expected funding through a particular term, CampusNexus Student uses the term specified by you on the ledger card or schedule folder as the expected funding term.

   Note: If both Summary Registration Bill and Detail Registration Bill were configured in Registration Bill Defaults, a pop-up menu will appear when you click the Print button. If only the Summary option or only the Detail option was configured in the default settings, the Print button caption is **Print Summary Registration Bills** or **Print Detail Registration Bills**, respectively.

7. Click **Update Advise Status** to update the advise status for this student.

8. Click **Remove Waitlist/Res** to remove this student from a wait list or reservation for the selected class. This button is only active if the student is on a wait list or has a reservation for the selected class. See also Campus Academic Records to enable/disable the student wait list option and set up the defaults.

9. The Convert to Audit Course button is used to convert a course to an audit course.

   a. Select the scheduled course and click the **Convert to Audit Course** button.

   b. Enter today's date in the prompt, click **OK** and receive the message to manually adjust the audit refund amount on the student's ledger card. A pending refund is added to the student ledger card.

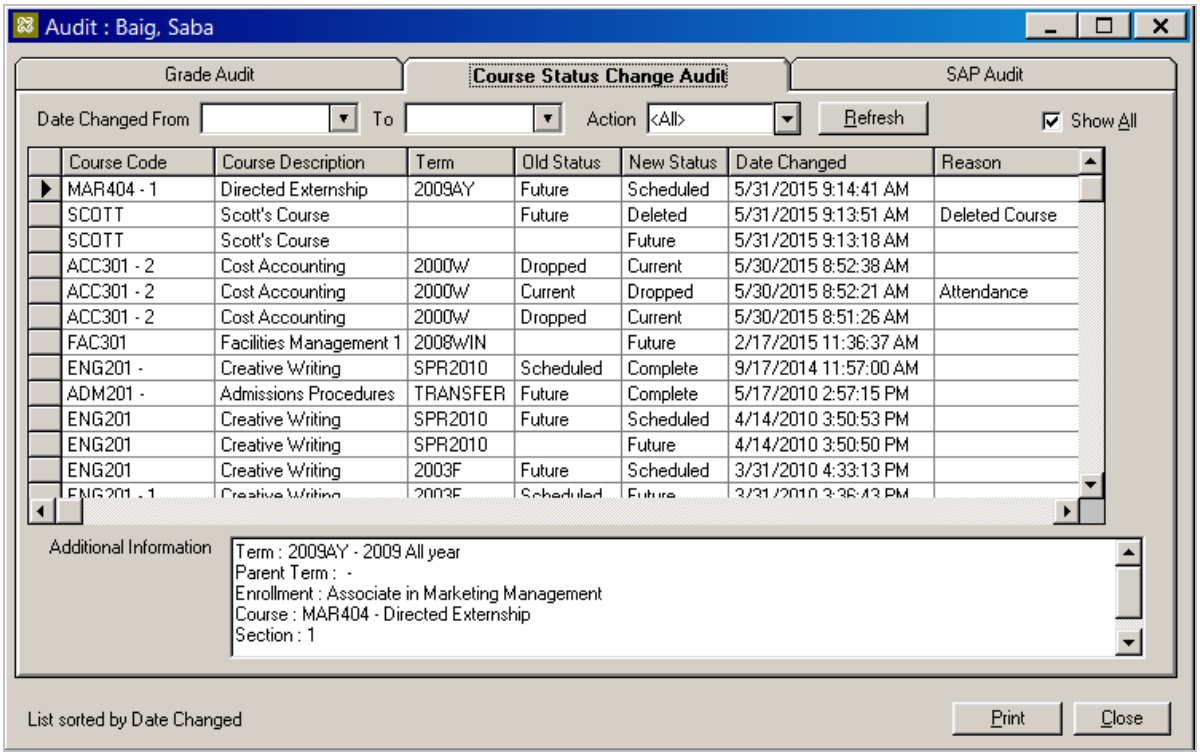
   c. The audit course fee amount is setup under Lists > Academic Records > Courses > Course Fees. If no audit amount exists, then no adjustment is required.

   d. If the auto charge billing method is used, the adjustment should also be generated automatically.

   Note: If student registration lock configuration has been enabled, upon clicking **Convert to Audit Course**, the Registration Locks will be evaluated.

10. Click **Term Sequence** to view the Student's Term Sequence in a grid. The Term Sequence specific to the student chosen is displayed. The grid is populated with the courses that the student has taken in the term that they were taken. See also Term Sequencing for additional information.

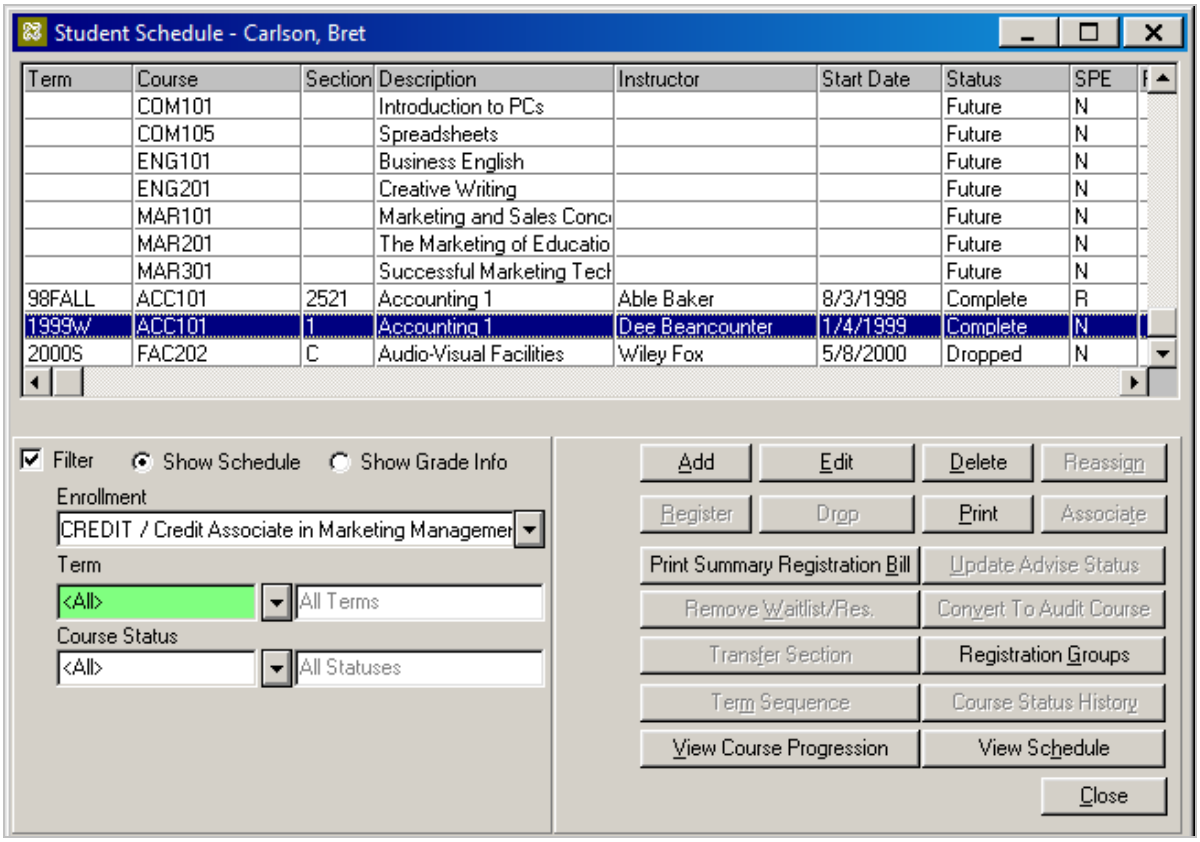
11. Click **Course Status History** to access a student's Audit folder.



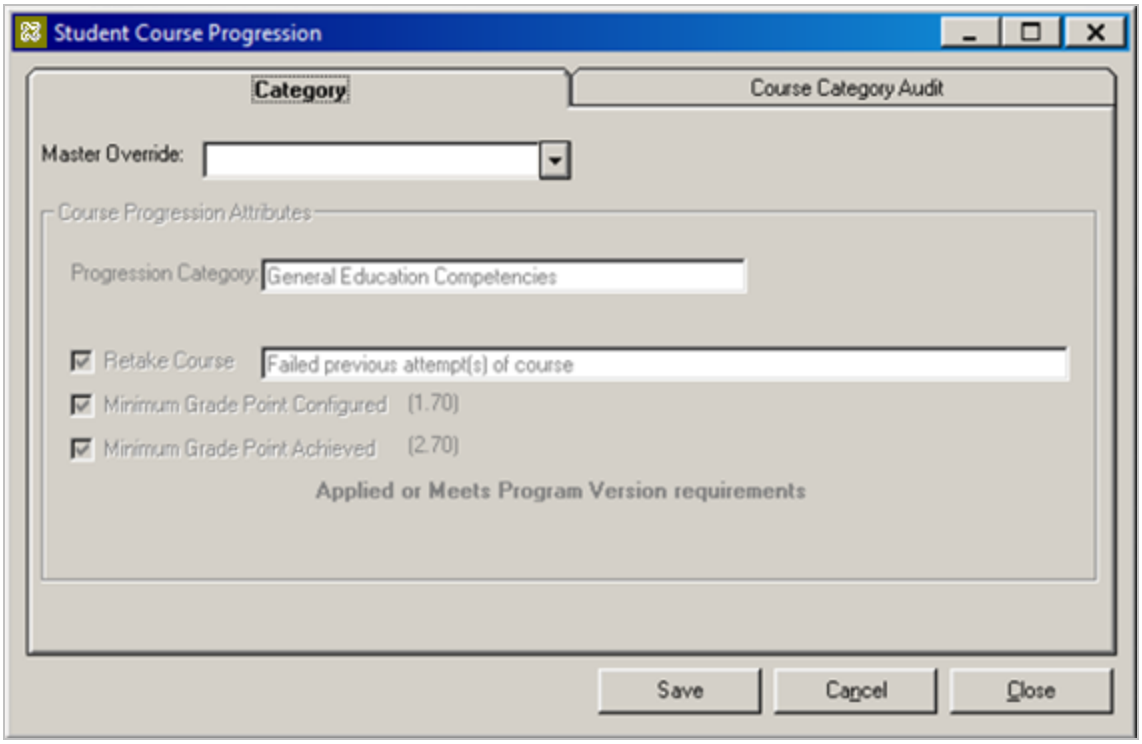
12. Click **View Schedule** and select **Weekly** or **Monthly**. If you select Weekly, the Class Schedule (Week n) form is displayed. If you select Monthly, the Class Schedule Calendar is displayed.

13. The **View Course Progression** button is enabled for enrollments that use a non-term Academic Calendar. Institutions using the SPE and CEFP reference an audit that logs category changes for a course, which establishes an audit trail that tracks a course from its origination to its resultant current category. Confirmation of this audit trail occurs in an audit form that shows the date when a category change took place for a course. For example, a category change occurs when a course does not meet a configured minimum grade point, and a user uses the DPA to fulfill a requirement in another category.

    This form also displays the category of a course that is manually added to the schedule and automatically associated with a category requirement by the use of the Equivalency configuration prior to a fulfillment record being created in the DPA.



Select a course and click **View Course Progression** to view the reason why CampusNexus Student assigned the value in the SPE field. The Student Course Progression form is displayed.

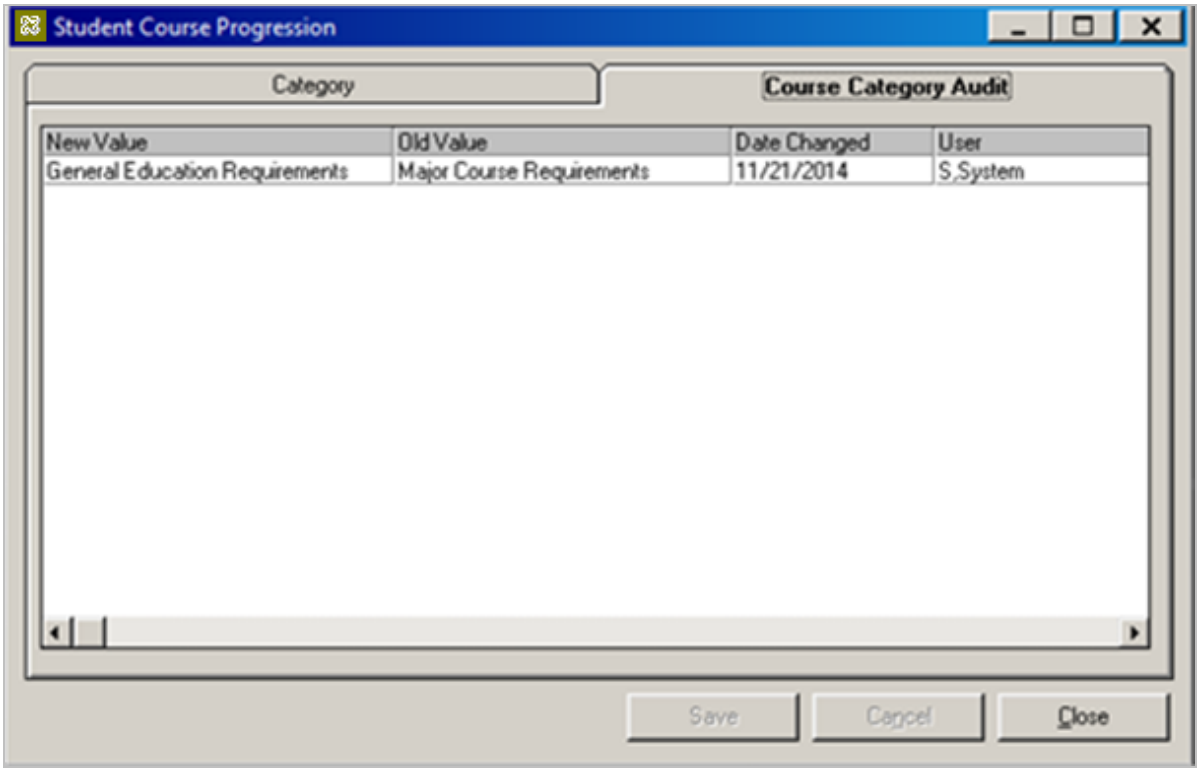


The Category tab of the Student Course Progression contains the following fields:

Field Descriptions: Category Tab

Field	Description
Master Override	This field is enabled for users who have permission to "Override SPE progression" on their staff user ID. The options are: • **Blank**: System attributes determine how the course is used. • **Always include in progression**: Regardless of system attributes, this setting forces CampusNexus Student to always progress the student for the course credits or hours and weeks. • **Always exclude from progression**: Regardless of system attributes, this setting forces CampusNexus Student to never progress the student for the course credits or hours and weeks.
Progression Category	This field displays the current category where the course is being used for progression. It is patterned to follow the courses categories in the DPA.
Retake Course	This field displays the retake status of the course if a retake exists. A retake for a better grade typically does not progress a student; however, a retake for a passing grade would progress a student.
Minimum Grade Point Configured	This field displays the minimum grade point configured for the course on the Program Version course list.
Minimum Grade Point Achieved	This field displays the grade point achieved once the course receives a final grade.

The Course Category Audit tab captures a category change, the date the change occurred, and the user who performed the change for which category the course should be associated.



14. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. You are returned to the Student Schedule form.
15. Click **Close** to close the form.

Adding a Course

Use the Add Course wizard to add a course to a student's schedule. The student must take the course at some time in the future as determined by the term and academic year. The course status is set as "Future" until the student is registered in a class section. See also Course List.

Note: The process of enrolling a student in a program version automatically adds all the required and elective courses to the student's schedule. This procedure should only be necessary for adding exceptions to the normal program version course list.

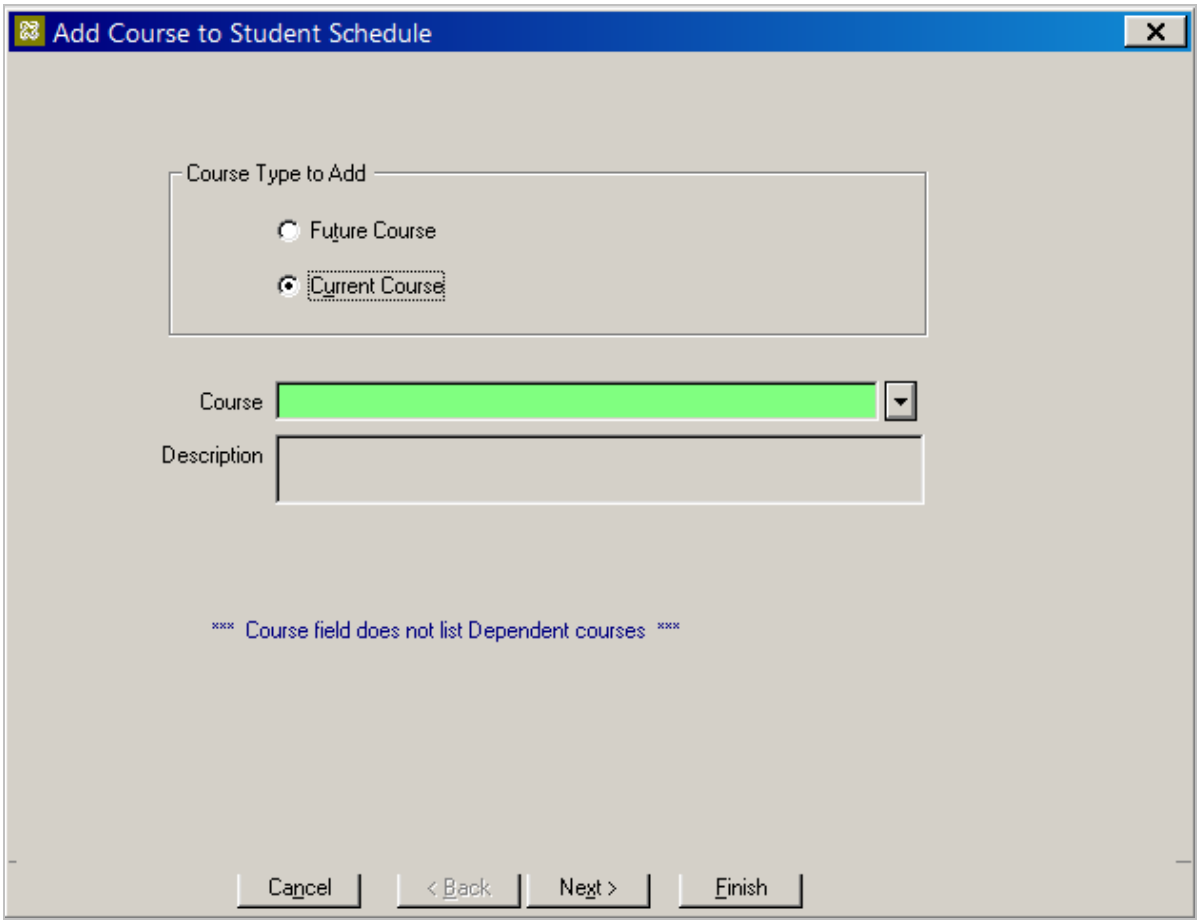
To add a course to a student's schedule:

1. Select a student.
2. Navigate to **View** > **Academic Records** > **Schedule**. The Student Schedule form is displayed.
3. Filter the list of courses by selecting the **Enrollment**, **Term**, and **Status**.
4. Click **Add** to add a new class section. The Add Course to Student Schedule wizard is displayed.

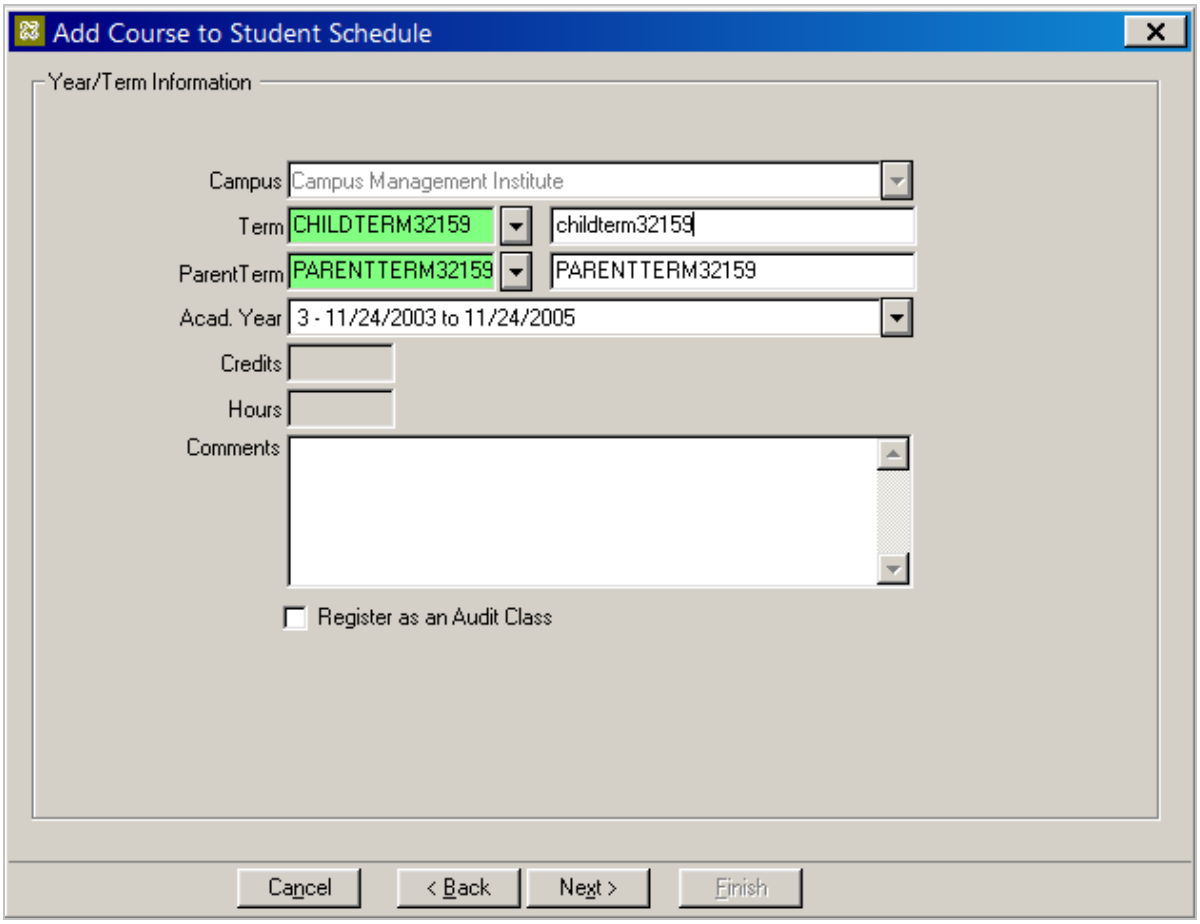
   When you click Add, CampusNexus Student checks if the student:

   - Is currently enrolled in the selected course for the selected term.
   - Has completed the selected course for the selected term.

   If so, then you are attempting to schedule or register a student in overlapping terms. As a result, CampusNexus Student displays an informational message.

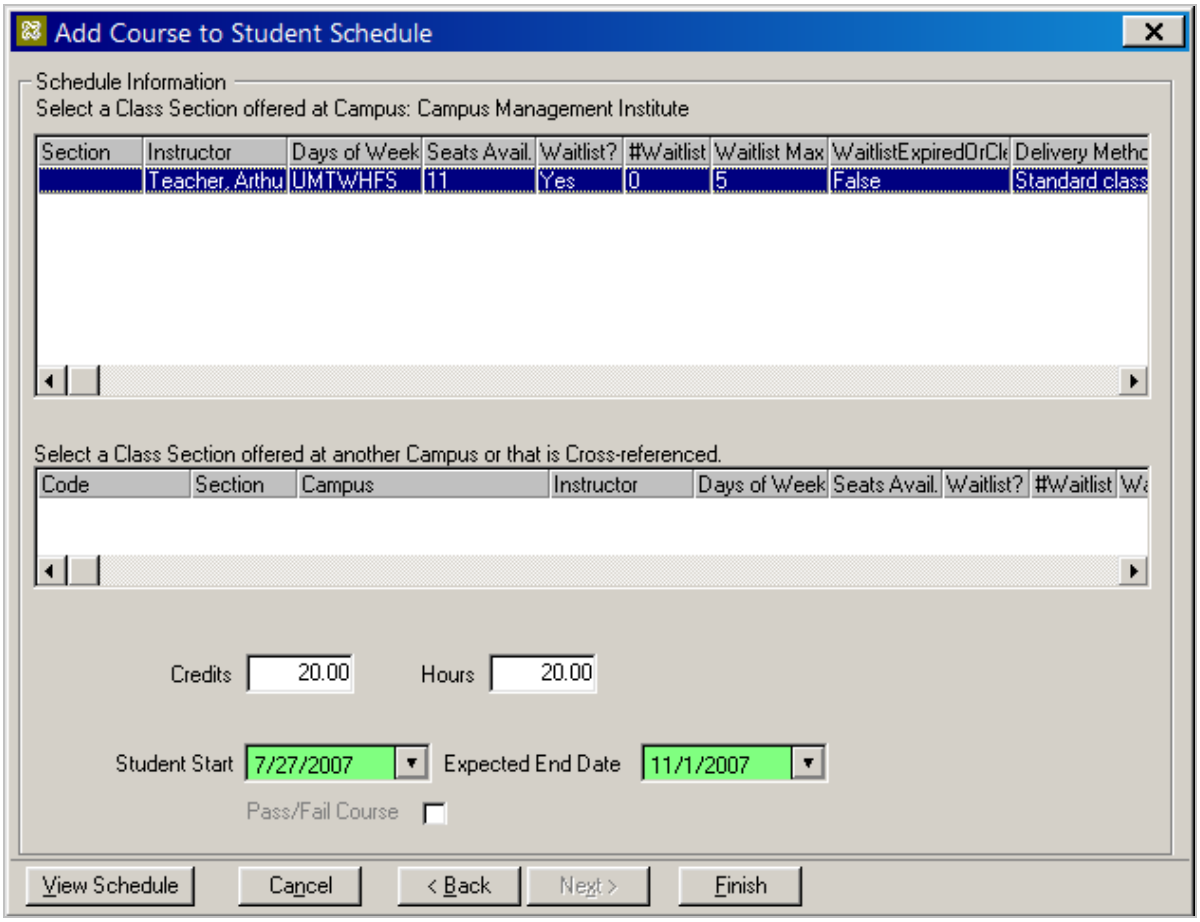


5. Select **Future Course** or **Current Course**.
6. Select the **Course**.
7. Click **Next**. Page 2 of the wizard is displayed.



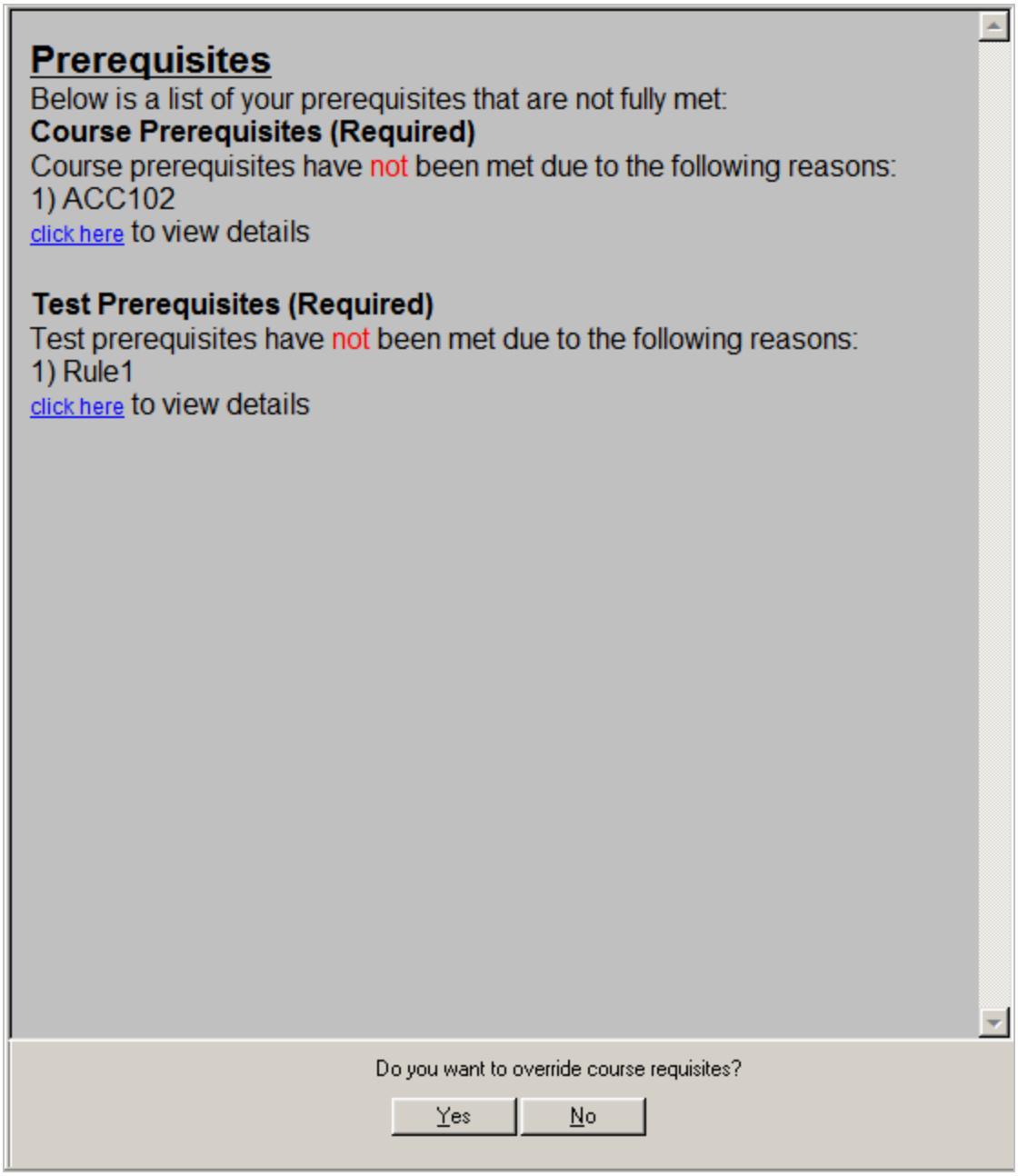
8. If necessary, select the **Campus**.
9. Select the **Term**.

   If the campus uses Term Relationships, the **Parent Term** is enabled and may be selected. In this case, the Term selected will represent the **Child Term** associated with the Parent Term .
10. If necessary, select the **Academic Year**.
11. If the course is configured as a variable credit course (i.e., 'Allow Override' is selected on the Courses Code Setup form), you can change the **Credits** and **Hours** values.
12. Enter any comments in the **Comment** field.
13. If applicable, select **Register as an Audit Class**.
14. Click **Next**. Page 3 of the wizard is displayed.



15. The Schedule Information is displayed for selection.
16. Select the **Student Start** date.
17. Select the **Expected End Date**.
18. The **Pass/Fail Course**check box is enabled and available for selection when the Course Section's pass/fail flag is set to the "Student's Choice" option. The check box will appear in a 'selected disabled' state when the pass/fail flag has been set to "Pass/Fail (Required)", indicating that the course will be graded on a pass/fail basis only. The check box will not appear when the pass/fail flag has been set to "Non-Pass/Fail" indicating that letter grades will be issued for the course. SeeCourse Code Setup for information regarding the pass/fail flag options.
19. Click View Schedule to view the course schedule on a weekly or monthly basis.
20. Continue adding class sections as necessary by selecting them from the list, until the student's schedule is completed.

    Note: If the program version for the student's enrollment uses a billing method with a frequency of Payment Period and there is no matching payment period, the course will not be billed. The following message is displayed: *"There is no matching payment period for the class section being registered. This course will not be billed."*
21. Click **Finish**. CampusNexus Student adds the course and closes the wizard. The program version, catalog, and area of study will be considered when adding the course. (If you don't immediately see the course on the student's schedule, press **F5** to refresh the course list.)
22. If prerequisites need to be satisfied for the added course, a message similar to the following is displayed:



To override the prerequisites, click **Yes**.

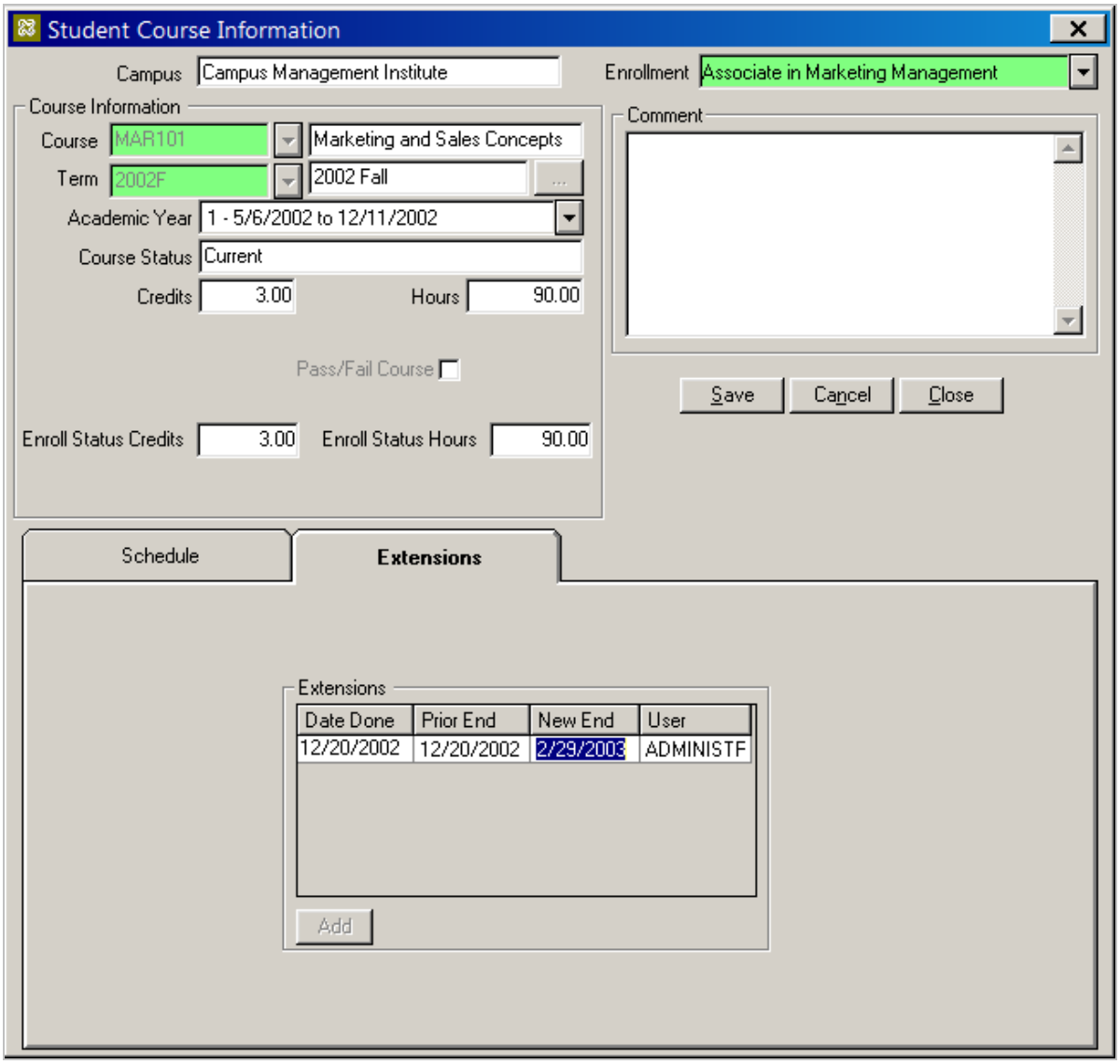
Adding Course Extensions

An institution may grant a student an extension of time for course completion. In CampusNexus Student, this extension is recorded in the student's schedule. You can only extend courses in which the student is currently registered.

A maximum number of allowed extensions can be set up for courses in a given program version under Lists > Academic Records > Programs > Program Versions > Distance Education.

To add an extension to a student's scheduled course (class section):

1. Select a student.
2. Navigate to **View** > **Academic Records** > **Schedule**. The Student Schedule form is displayed.
3. Filter the list of courses by selecting the **Enrollment**, **Term**, and **Status**.
4. Select the course to be extended and click **Edit**. The Student Course Information form is displayed.
5. On the Extensions tab, click **Add**. The Date Done, Prior End, and User fields are filled in by CampusNexus Student.
6. Enter the **New End** date of the course in mm/dd/yy format.



7. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

To set up an automatic charge for a course extension:

An automatic charge can be set up to be posted to the students ledger card when a course extension is granted.

1. Navigate to **Lists > Student Accounts >** Billing Method. Select **Programs**.
2. Set the Billing Method for the Program Version to **Course**.
3. Navigate to **Lists > Student Accounts >** Programs. The program version must have the Transaction Code **EXTCRSE** as one of its charges with the amount to be charged for an extension.

   The transaction code **EXTLSN** is set up with an amount to be charged for each lesson, exam, or book report that has not been received when the extension is granted.
4. Clear the "one time" indicator on these charges when they are set up. See Transaction Codes.

The total charge to a student when a course is extended is the Course Extension Charge (EXTCRSE) plus the Lesson Extension Charge (EXTLSN) times the number of lessons, exams, and book reports not yet received.

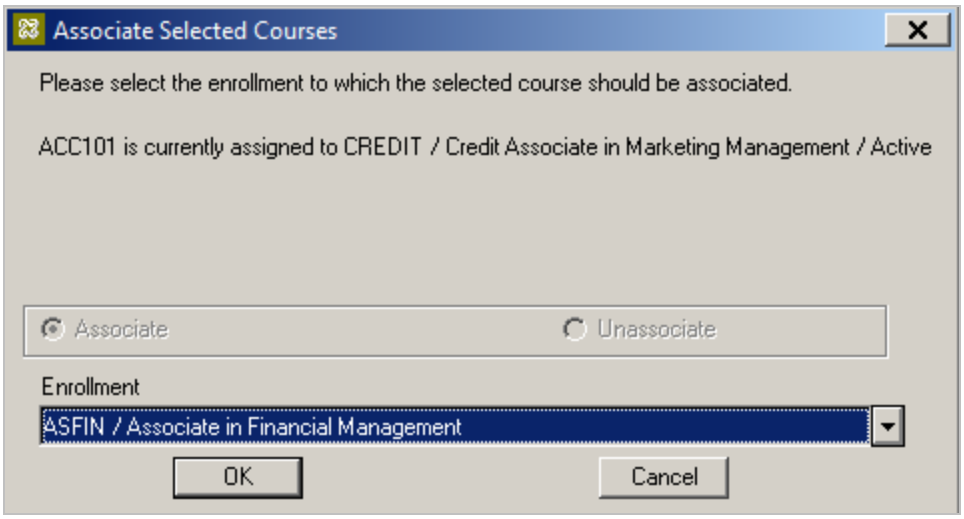
Associate or Unassociate Courses

Use this function to allow staff members to associate completed or dropped courses with other enrollments. This function assumes that the selected student has more than one previously established enrollment. Associating or unassociating courses is different than transferring an enrollment to another enrollment.

To associate completed or dropped courses with other enrollments:

This feature allows staff members to associate completed or dropped courses with other enrollments. The Associate button toggles between Associate and Unassociate.

1. Select a student.
2. Make sure that the target enrollment is set up. See **View > Academic Records > Enrollment**.
3. Navigate to **View > Academic Records > Schedule**. The Student Schedule form is displayed.
4. Select one or more courses. To select more than one course, hold down the **Ctrl** key while clicking on each course to be associated. Only Completed and Dropped courses may be associated.
5. Click **Associate**. The Associate Selected Courses form is displayed.



6. Select the **Associate** option.

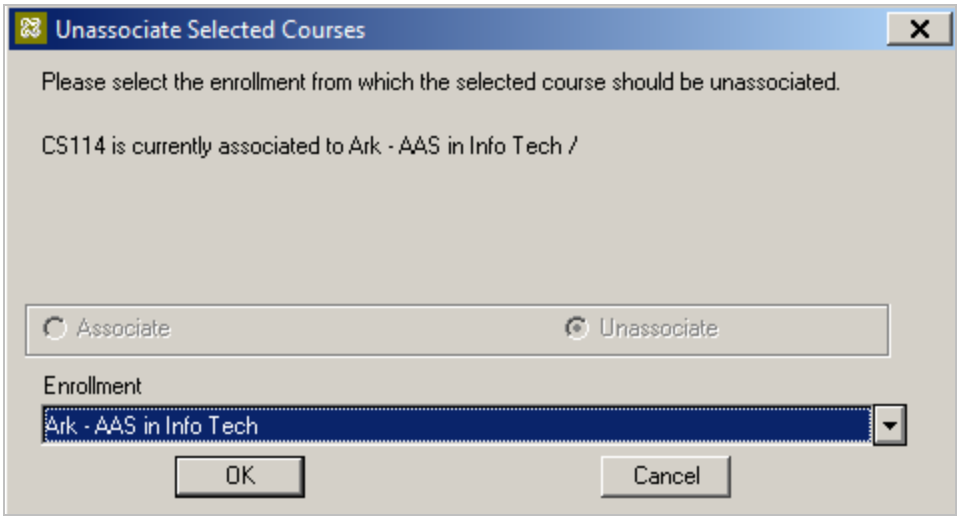
   Note: The Associate and Unassociate options can be available at the same time when the selected course is associated with at least one enrollment, yet enrollments exist to which the course can still be associated. CampusNexus Student displays Associate Selected Courses or Unassociate Selected Courses in the header depending on the radio button selected.
7. From the Enrollment list, select the **Enrollment** to which the selected courses will be associated. When associating a course, enrollments that are already associated with the selected course will not appear in the Enrollment list.
8. Click **OK** to process the association of courses.
9. A confirmation message is displayed. Click **OK**. You are returned to the student's Schedule form.
10. On the Schedule form, verify the data in the **Associated Enrollments** column. The Enrollment column reflects the

original enrollment, while the associated enrollments are displayed in the Associated Enrollments column for the selected courses.

To unassociate courses from an enrollment:

The Unassociate button is enabled for courses that have already been associated with all available enrollments. The button toggles between Unassociate and Associate.

1. Select a student.
2. Make sure that the target enrollment is set up. See **View > Academic Records > Enrollment**.
3. Navigate to **View > Academic Records > Schedule**. The student's Schedule form is displayed.
4. Select one or more courses. To select more than one course, hold down the **Ctrl** key while clicking on each course to be associated. Only Completed and Dropped courses may be unassociated.
5. Click **Unassociate**. The Unassociate Selected Courses form is displayed.



6. Select the **Unassociate** option.
7. From the Enrollment list, select the **Enrollment** from which the selected courses will be unassociated.
8. Click **OK** to process the unassociation of courses.
9. A confirmation message is displayed. Click **OK**. You are returned to the student's Schedule form.
10. Verify that the **Associated Enrollments** column is empty on the student's Schedule form.

Deleting a Course

It may become necessary to delete a course from a student's schedule if it was added in error. This can only be done before the student has been assigned to a class section for the course. The status of the scheduled course must be **Future**.

A course can be deleted from the system when the course is in **Scheduled** status, but this practice is not recommended. Instead, the course should be unregistered before being deleted.

Once the student has been assigned to a class section for a course, the status is changed to **Current**. In this case, you can remove the student from the class section by using the one of the following methods:

- Unregister
- Drop
- Final Grade

The option chosen depends on the circumstances.

Note: CampusNexus Student does not allow a course to be unregistered or dropped if it fulfills a prerequisite or corequisite requirement for another course in which the student is registered. A message is displayed containing the prerequisite and corequisite rules applicable to that course. The course may only be unregistered or dropped if:

a. The student is first dropped or unregistered from any courses that had their prerequisite requirements fulfilled by the course for which a drop or unregistration was initially attempted;

b. The user has permissions to override prerequisite and corequisite requirements for Drop/Unreg.

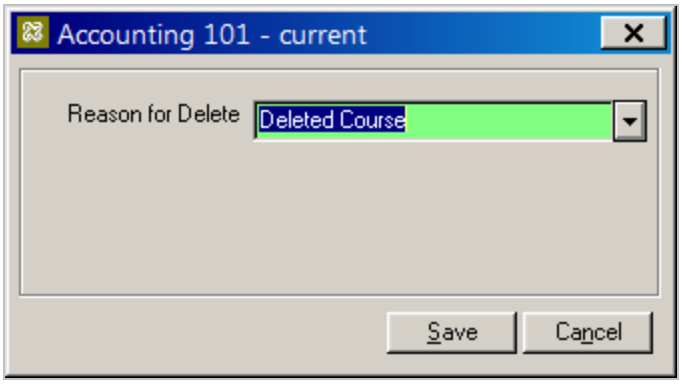
When a course is removed from a student's schedule, by deleting or unregistering, CampusNexus Student recalculates values in the enrollment term summary form. CampusNexus Student recalculates the last date of attendance (LDA).

Any Course Status change is retained and posted to the Audit folder within the Course Status Change Audit tab. The Audit folder may accessed at any time through the Course Status History button on the Student Schedule when it is enabled.

To delete a course from a student's schedule:

1. Select a student.
2. Navigate to **View** > **Academic Records** > **Schedule**. The Student Schedule form is displayed.
3. Filter the list of courses by selecting the **Enrollment**, **Term**, and **Status**.
4. Select the future **Course** to be deleted from the list of scheduled courses.
5. Click **Delete** to permanently remove a class from the student's schedule. If an associated course is selected, the native enrollment will remain.

   Note: If student registration lock configuration has been enabled, upon clicking Delete, the Registration Locks will be evaluated.
6. A confirmation message is displayed. Click **Yes**.
7. Dropping, unregistering, or deleting the student from a course requires a reason for the action. Select a **Reason** for deleting the course from the student's schedule. See Course Reason Code Setup to learn more about setting up reason codes.



8. Click **Save** to continue processing the deletion of the course or **Cancel** to discontinue.

Dropping a Class Section

A class section can be dropped from a student's current class schedule. Dropping a student from a class section implies that the student started the class and elected to drop or was forced to drop the class. You can only drop a student from a class section that the student is currently attending.

When you drop a class section from the student's schedule, CampusNexus Student prompts for the Drop Date and the Grade for the class. The Grade is optional. You can drop a course with a status of **Complete** (the status to which the scheduled class section is changed when a final grade is posted). If the course is required and active, the course is automatically added as a new course back to the student schedule as **Future** status provided that the optional setup is enabled.

Note: CampusNexus Student does not allow a course to be dropped if it fulfills a prerequisite or corequisite requirement for another course in which the student is registered. A message is displayed containing the prerequisite and corequisite rules applicable to that course. The course may only be dropped if:

a. The student is first unregistered or dropped from any course(s) that had their prerequisite requirements fulfilled by the course for which the drop was attempted;

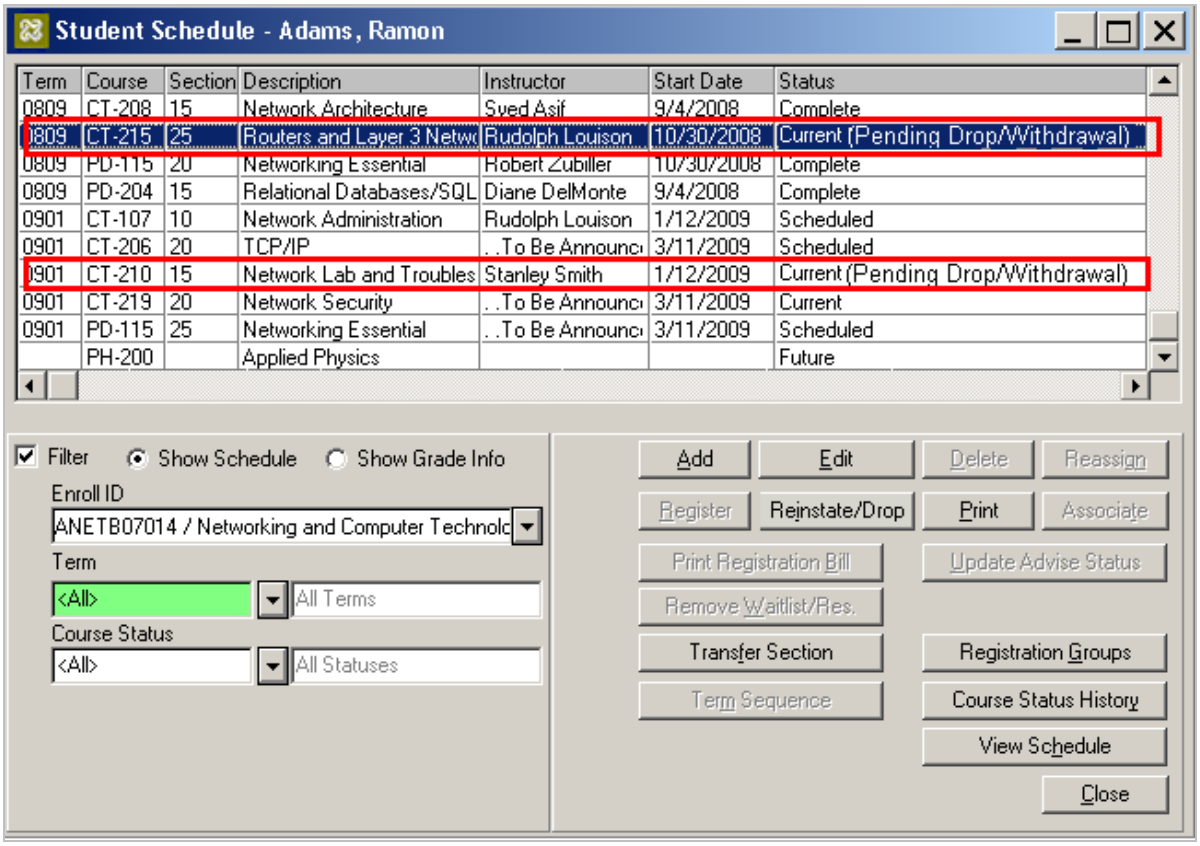
b. The user has permissions to override prerequisite and corequisite requirements for Drop/Unreg.

Any Course Status change is retained and posted to the Audit folder within the Course Status Change Audit tab. The Audit folder may accessed through the Course Status History button on the Student Schedule.

To drop a class section from a student's schedule:

1. Select a student.
2. Navigate to **View > Academic Records > Schedule**. The Student Schedule form is displayed.
3. Filter the list of courses by selecting the **Enrollment**, **Term**, and **Status**.
4. Select the **Course** and **Section** to be dropped.
5. Click **Drop** to drop the selected class from the student's schedule.

   If a student submits a course drop request through Portal, that request can be approved or cancelled through CampusNexus Student by using the Reinstate/Drop function. When a student submits a pending withdraw request, the course status will be appended with 'Drop/Withdrawal Pending'. If a course status is 'Scheduled (Drop/Withdrawal Pending)' or 'Current (Drop/Withdrawal Pending)', the staff member can drop or cancel the drop request. For this, the Drop button will change to **Reinstate/Drop**.

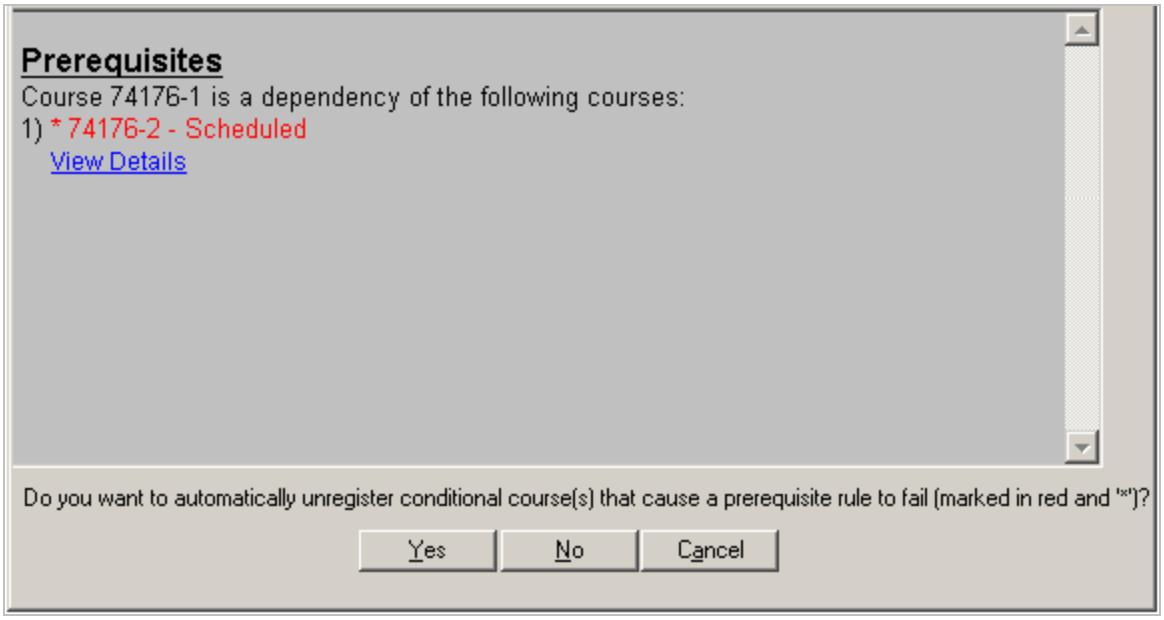


Note: If student registration lock configuration has been enabled, upon clicking Drop, the Registration Locks will be evaluated.

CampusNexus Student checks if the course to be dropped fulfills prerequisite or corequisite requirements for any other courses. If the course to be dropped fulfills a prerequisite or corequisite requirement, a message indicates the prerequisite and/or corequisite rules that would be broken if the course was dropped.

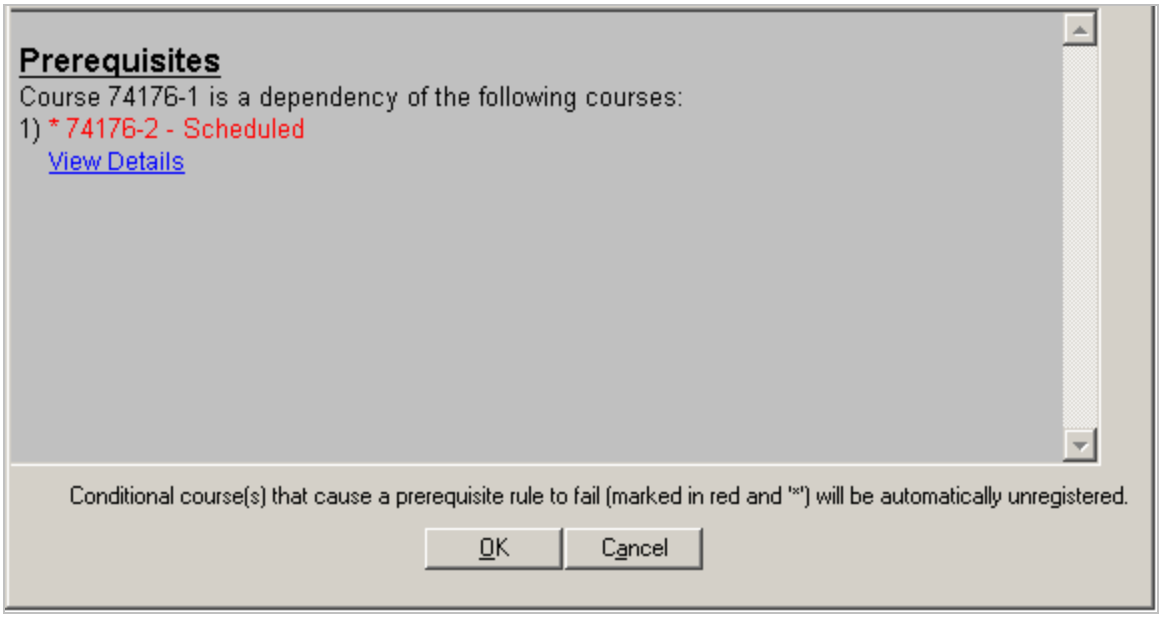
If campus is configured for automatic unregistration of conditional courses:

If you have permission to override prerequisite and corequisite rules for Drop/Unreg, the following message is displayed:



- If you click **Yes**, the conditional course(s) will be unregistered and the prerequisite course will be dropped.
- If you click **No**, only the prerequisite course will be dropped.
- If you click **Cancel**, the action will be cancelled and no course(s) will be dropped/unregistered.

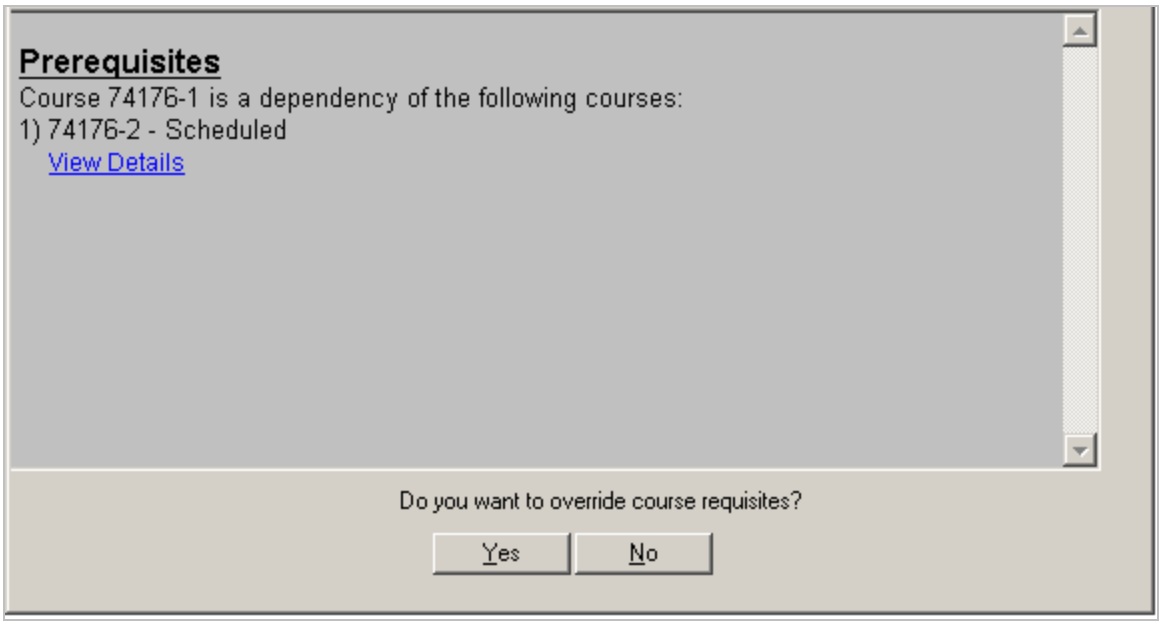
If you do not have permission to override the prerequisite and corequisite rules, the following message is displayed:



- If you click **OK**, the conditional course(s) will be unregistered and the prerequisite course will be dropped.
- If you click **Cancel**, the action will be cancelled and no course(s) will be dropped/unregistered.

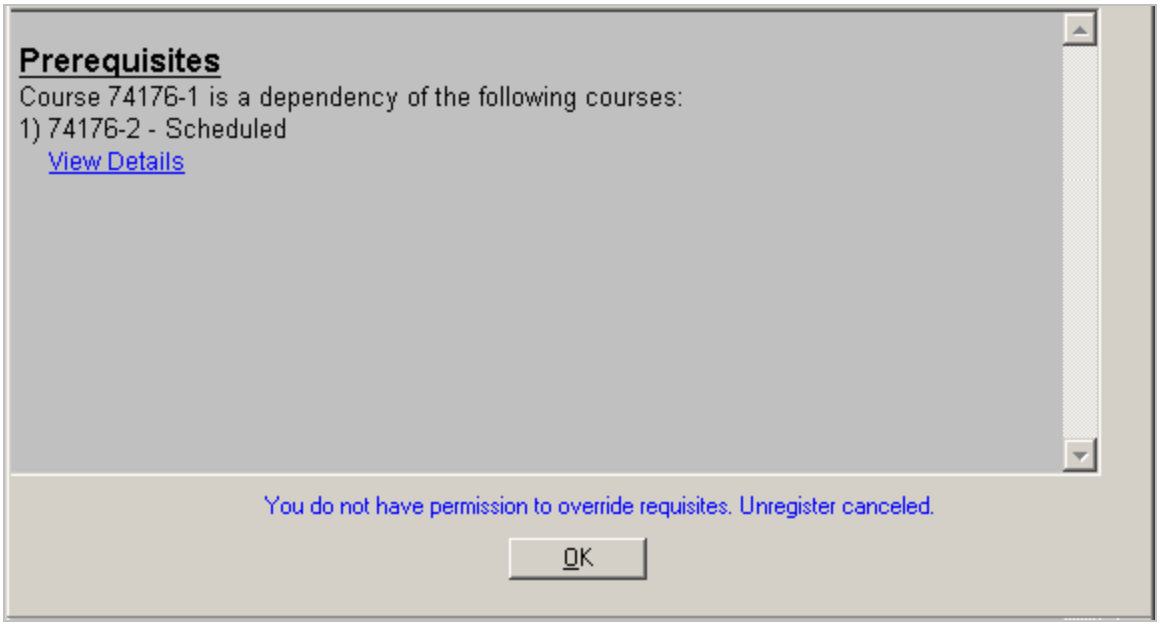
If campus is not configured for automatic unregistration:

If you have permission to override prerequisite and corequisite rules for Drop/Unreg, the following message is displayed:



- If you click **Yes**, the prerequisite course will be dropped, but the conditional course(s) will not be unregistered.
- If you click **No**, the process will terminate.

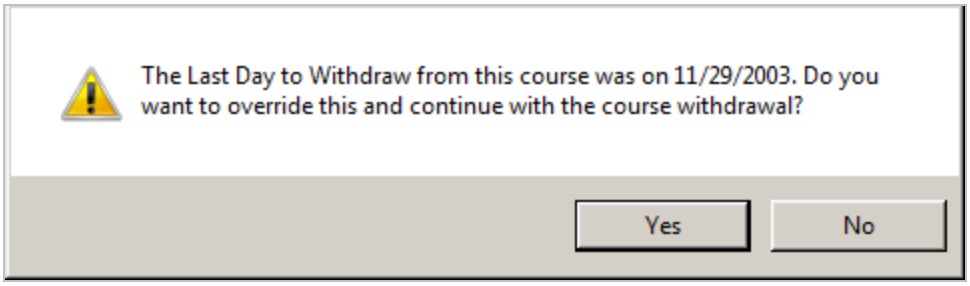
If you do not have permission to override the prerequisite and corequisite rules, the following message is displayed:



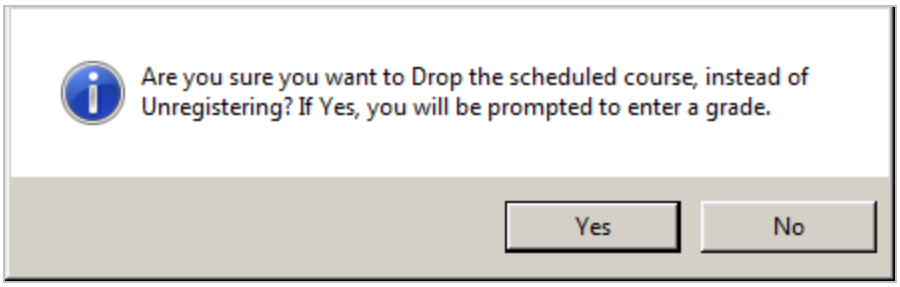
- When you click **OK**, the process terminates.

If the Enforce Last Day to Withdraw feature is configured for a course section's campus (Setup > Campus Locations > Edit/Add > Academic Records (tab) > General (tab)), CampusNexus Student verifies that users who do not have override privileges for Last Day to Withdraw, cannot withdraw a student from a course section that is in scheduled, current or LOA status if it is after the LDW date set on the class section. A message is displayed stating that the student can no longer be withdrawn.

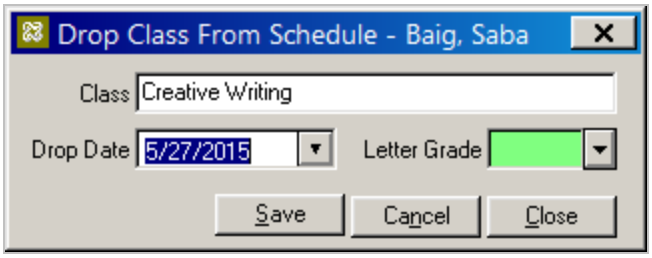
If a user who has override privileges tries to drop a course for which LDW date has already passed, a message similar to the following is displayed:



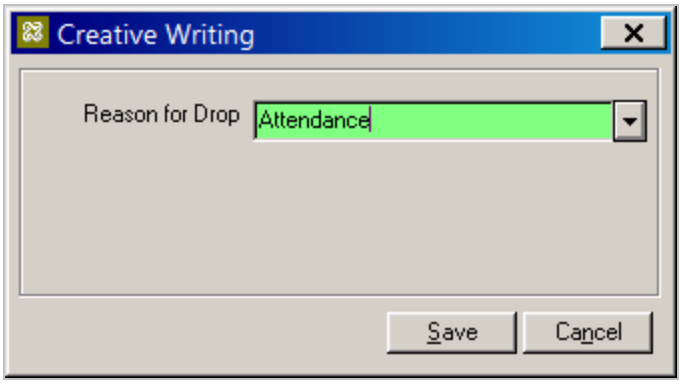
6. A confirmation message is displayed. Click **Yes**.



7. In the Drop Class From Schedule form, verify that the correct class is displayed, select the **Drop Date**, and enter a **Letter Grade**.



8. Click **Save**. The status of the class section on the student's schedule is changed to **Dropped** and the date and the default grade (if set up in Grade Scale) is listed in the **Letter Grade** field. You can select a different drop grade.
    - If the course is required and active, the course is automatically added as a new course back to the student schedule in **Future** status.
    - If the course is inactive, but an equivalent course is active, the equivalent course is automatically added to the student's future course requirements.
    - If the student has exceeded the maximum repeats for the course, it will not be added to the student's future course requirements.
9. Select a **Reason for Drop**. See Course Reason Code Setup for additional information.



10. Click **Save** to continue or **Cancel** to exit.

Reinstating a student's course

Once a class section has been dropped, if you select the class section on the student's schedule again, the button that was formerly labeled **Drop** changes to **Reinstate**. If you click **Reinstate**, the student will be reinstated in the previously dropped class section, the course status reverts back to previous status, and posted grades for this course are removed. A confirmation message is displayed. Click **Yes**. For more information, see Reinstate Course.

Editing a Course

When a student is enrolled in a program version, the list of required and elective courses associated with the program version is copied into the student's enrollment record. You can edit the courses on the student's schedule using this procedure. See also Course List.

Notes:

- When editing a course that is on a student's schedule, you can change the Enroll Status Credits and/or Enroll Status Hours values.
- If the course is configured to allow it (i.e., the 'Allow Override' is selected on the Courses Code Setup form), you can change the Credits and/or Hours values.
- If changes are made on a course that is in a status other than Future, the configured registration locks could be affected. Registration Locks are evaluated upon saving the changes to determine if a lock is in place that should prevent the changes from taking place. If the change cannot take place due to a registration lock, the process is canceled and a message is displayed.

To edit a course on a student's schedule:

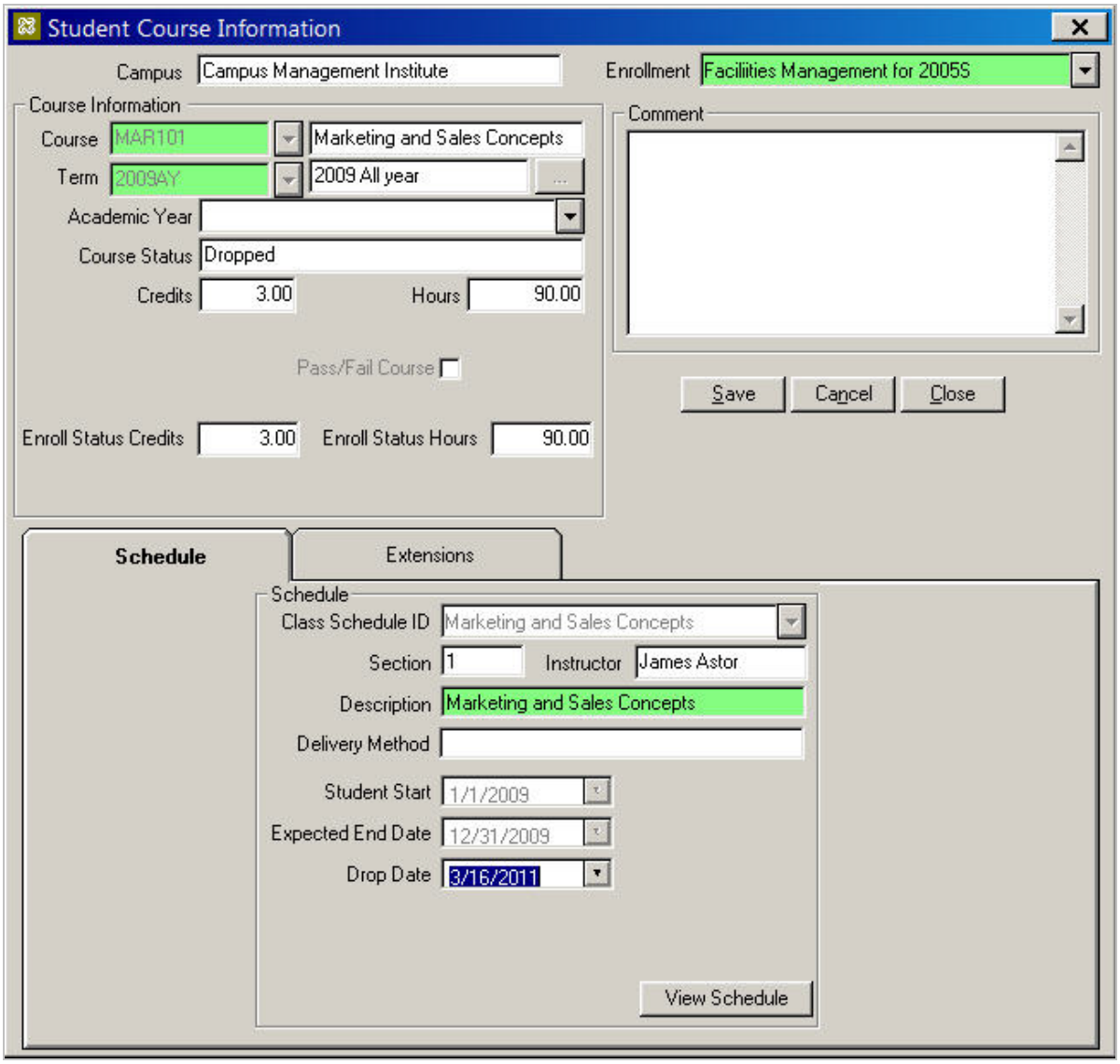
1. Select a student.
2. Navigate to **View** > **Academic Records** > **Schedule**. The Student Schedule form is displayed.
3. Filter the list of courses by selecting the **Enrollment**, **Term**, and **Status**.
4. Select a course to be edited.
5. Click **Edit**. The Student Course Information form is displayed.

   When you click Edit, CampusNexus Student checks if the student:

   - Is currently enrolled in the selected course for the selected term.
   - Has completed the selected course for the selected term.

   If so, then you are attempting to schedule or register a student in overlapping terms. As a result, CampusNexus Student displays an informational message.

   Note: For associated courses, the Edit button will only be available for the enrollment where the course was completed, otherwise the button will be disabled.



6. Select an **Enrollment** to transfer a student from one program version to another.
7. Select the **Course** to be included on the student's schedule. The program version, catalog, and area of study are considered when editing the course.
8. Review the data displayed in the **Course**, **Term**, **Academic Year**, and **Status** fields.

   The status will be Future if a class section has not been selected. The status will be Current if a class section has been selected.

   Student's status in the class section:

   - **C** = Currently attending
   - **D**= Dropped
   - **F** = Future start
   - **L** = Leave of Absence
   - **P** = comPlete
   - **S** = Scheduled future
9. The **Enroll Status Credits** and **Enroll Status Hours** fields display the credits and hours that CampusNexus

Student uses to calculate enrollment status for financial aid purposes.

If the class is in future status, the values are copied from the Course setup. If the student has already been scheduled, the values are copied from the Class Schedule.

You can edit these fields by entering the number of credits or hours if you need to force CampusNexus Student to calculate an enrollment status for financial aid purposes that may be different than the actual academic credits or hours that a student has enrolled in (for instance, if a student is enrolled in a non-academic credit graduate level internship or remedial skills class required by an academic program).

Note: If the Enroll Status Credits and/or Enroll Status Hours for a course were modified while the course had a status of 'Future' and then the student registers in to the course, the Enroll Status Credits and/or Enroll Status Hours fields will be overwritten with the values from the Class Schedule.

10. The **Outside Coursework Hours** and the **Total FA Hours** fields are only visible when the Clock to Credit option is ON for the enrolled program version.
    - When CEFP Configuration is ON, the Total FA Hours = Outside Coursework Hours + Enroll Status Hours.
    - When CEFP Configuration is OFF, the Total FA Hours = Outside Coursework Hours + Earned Hours when the final grade was posted, otherwise Schedule Hours.
11. In the Schedule section of the form, select the **Class Schedule ID** that represents the class section in which the student is registered. The **Section**, **Teacher** (Instructor), Course **Description**, and **Delivery Method** are displayed. The **Student Start Date** and **Expected End Date** for the selected class section is displayed.
12. If the student has a Billing Method that is configured to use Fee Schedules and the course being edited has one or more Fee Schedules associated with it, the **Fee Schedule** list contains the fee schedules that may be used to charge the student for the course. Click **View Fees** to view the fees associated with the selected fee schedule.

Note: The Fee Schedule is not available for Future Courses because the Fee Schedule must be associated with a Course Section.

13. Enter the **Date Requirements Met** for externship or online courses.
14. Click View Schedule to view the course schedule on a weekly or monthly basis.
15. Enter any comments in the **Comment** field. These comments will appear on class roster reports.
16. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Reassigning a Course

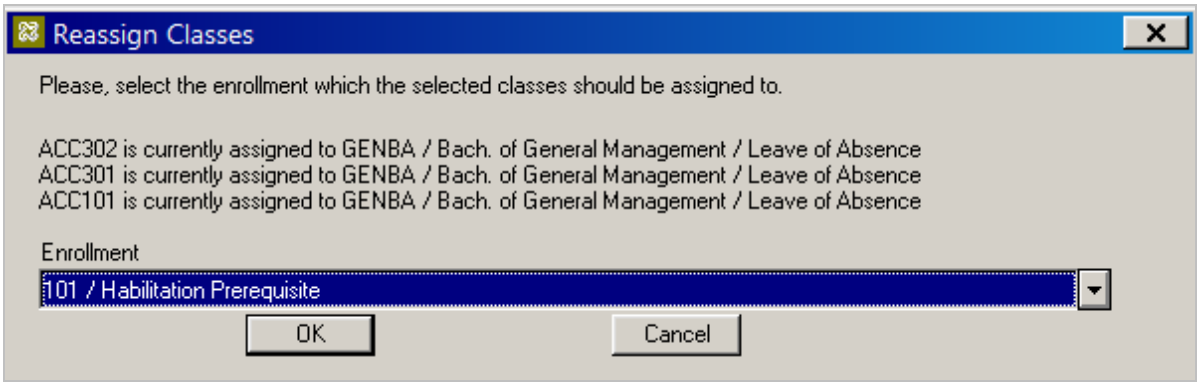
You can reassign courses to move courses from one enrollment to another. Only courses with a status of Complete, Drop, or Future may be re-assigned.

The reassign function assumes that the selected student has more than one previously established enrollment. This function is different than transferring an enrollment to another enrollment. See also Associate Selected Classes.

To reassign courses from one enrollment to another:

1. Select a student.
2. Navigate to **View > Academic Records > Enrollment** and verify that the target enrollment is set up.
3. Navigate to **View > Academic Records > Schedule**. The Student Schedule form is displayed.
4. Filter the list of courses by selecting the **Enrollment**, **Term**, and **Status**.
5. Select one or more courses. To select more than one course, hold down the **Ctrl key** while clicking on each course to be reassigned. Only Completed, Dropped, or Future courses may be re-assigned.
6. Click **Reassign**. This button is displayed only, if you have permission to reassign courses. The Reassign button is disabled when selecting associated courses. When courses are reassigned, the Native Enrollment field is set to blank.

   The Reassign Classes form is displayed. If more than one course was selected, the Reassign Classes form lists the courses.



7. Select the **Enrollment** to which the selected courses will be assigned.
8. Click **OK** to process the reassignment of courses.
9. A confirmation message is displayed. Click **OK**. You are returned to the Schedule form.

Registering a Student

Registration for class sections is normally done in batch mode under Daily > Academic Records > Registration; however, occasionally it is necessary to register a student into a class from the Student Schedule form.

Once a class section has been scheduled for a student, you can no longer change the term, course, or class section. If such a change is necessary, you must first unregister the student from the class section and then register the student in the correct class section.

Validations for Registrations

CampusNexus Student checks the following when registering a student into a class section:

A. **Registration Hold**

CampusNexus Student checks the hold code for registration. If the student is in a hold group, classes cannot be added or registered for the student, unless you have permissions to override the hold.

B. **Maximum Students in Class**

CampusNexus Student checks how many students are registered for the class against the maximum allowed in the class.

- If you have override permissions (Staff Setup), you can select to override the maximum allowed in class and register the student.
- If you do not have permission to override the maximum allowed in class (Staff Setup), a message indicates that you cannot register the student.

C. **Prerequisites**

CampusNexus Student checks for a grade on prerequisite courses. If a grade is not found, a message listing the prerequisite requirements is displayed. This message indicates that the prerequisite courses are currently scheduled.

- If you have override permissions (Staff Setup), you can override the prerequisite requirements.
- If you do not have override permissions (Staff Setup), a message indicates that you cannot register the student.

D. **Corequisites**

CampusNexus Student requires that a student registers in corequisite courses concurrently. A student may not register in a course with corequisite requirements unless the student registers for all corequisite courses at the same time or has previously completed the corequisite course. If a student does not meet the corequisite requirements, a message listing the corequisite requirements is displayed.

- If you have override permissions (Staff Setup), you can override the corequisite requirements.
- If you do not have override permissions (Staff Setup), a message indicates that you cannot register the student unless you register the student in the required corequisite courses at the same time. For more information, see Register for Multiple Courses.

E. **Currently Taking**

If the student is already registered for the class, a message is displayed indicating that the student cannot be registered again.

F. **Already Taken**

CampusNexus Student prompts for a confirmation if a student is registered into a previously taken course. A student may take a same course more than once. This situation usually arises when a student must "retake" a course due to an incomplete or poor performance in the first registration.

CampusNexus Student takes into account the Retake Override indicator on the Courses Code Setup form. Some courses, such as Physical Education, are set up to allow retakes.

G. **Conflicts**

If the class being scheduled meets on the same date and time as another class that is already on the student's schedule, a message is displayed listing the courses that are in conflict. You are prompted to confirm if it is OK to register anyway.

- If you have override permissions (Staff Setup), you can override the conflict.
- If you do not have override permissions (Staff Setup), you cannot register the student.

H. **Add/Drop Flag**

During registration and unregistration, the 'Add/Drop Flag' for the campus is checked to determine what type of add/drop validation needs to take place. If validation must take place, CampusNexus Student calculates the add/drop date as follows:

- The Academic Records system level setting ('Campus for add/drop?' field) is used to determine which campus to use when determining the add/drop policy: the 'Student's enrollment campus' or the 'Course section's campus'.
- The 'Add/Drop Flag' for the campus designated in the Academic Records system level setting is checked.
- If the Academic Records system level setting is configured to use the 'Student's enrollment campus', and the 'Add/Drop Flag' of the student's enrollment campus is set to 'S - Course Section Enforced', CampusNexus Student enforces the add/drop policy of the course section's campus.

  If the 'Add/Drop Flag' for the student's enrollment campus is different than 'S - Course Section Enforced', the student's enrollment campus is used.
- If the Academic Records system level setting is configured to use the 'Course section's campus', the policy of the same campus is used.
- Once the appropriate campus and add/drop flag configurations have been determined, the add/drop date is calculated as follows:
  - If the 'Add/Drop Flag' is 'N - Not Enforced', there is no add/drop date.
  - If the 'Add/Drop Flag' is 'C - Campus Enforced', the add/drop date is enforced by campus (the campus that was determined above). Calculate the add/drop date by adding the number of days after the start date configured at the campus level to the course section's term start date.
  - If the 'Add/Drop Flag' is 'T - Term Enforced', the add/drop date is enforced by term. Obtain the add/drop date configured at the term level for the course section's term.
  - If the 'Add/Drop Flag' is 'S - Course Section Enforced', the add/drop date is enforced by course section. Obtain the add/drop date configured at the course section level for the appropriate course section.

The add/drop date override permissions (Staff Setup) are also checked.

- If you have override permissions and the add/drop date has passed, a message is displayed and you have the option to override.
- If you do not have override permissions and the add/drop date has passed, an add/drop warning is displayed and the registration or unregistration action is cancelled.

Notes:

- During course registration, if at least one applicable Schedule Change Lock registration lock type exists, you cannot register the course.
- Courses taken as an 'Audit Class' are handled the same way as non-audit courses with regard to the Schedule Change Lock registration lock type.
- Maximum Limit and Minimum Limit registration lock types do not apply to courses registered as an 'Audit Class'.
- If a course being registered is cross-referenced to another course, the registration lock evaluation logic will use the credits/enroll status credit/enroll status hours/hours from the course it is cross-referenced to, not the actual course being registered.

Navigation Paths for Registration

Course registration can take place from multiple navigation paths in CampusNexus Student; however, the add/drop validation outlined above will be executed regardless of where course registration is initiated.

- View > Academic Records > Schedule > Add > Course Type to Add as "Current"
- View > Academic Records > Schedule > Delete
- View > Academic Records > Schedule > Drop/Reinstate
- View > Academic Records > Schedule > Register
- View > Academic Records > Schedule > Register < *select more than one course* > Register
- View > Academic Records > Schedule > Register > Term Sequence
- View > Academic Records > Schedule > Term Sequence > Register Single Course/Register Courses in Term
- View > Academic Records > Schedule > Unregister
- Daily > Academic Records > Batch Unregister Courses
- Daily > Academic Records > Registration > Term Registration
- Daily > Academic Records > Registration > Track Registration
- Daily > Academic Records > Schedule Classes > Waitlist > Accept Seat Max/Accept Student(s)/Re-assign

To register a student in a class section from the Student Schedule form:

1. Select a student.
2. Navigate to **View** > **Academic Records** > **Schedule**. The Student Schedule form is displayed.
3. Filter the list of courses by selecting the **Enrollment**, **Term**, and **Status**.
4. Select the course in which the student is to be registered. The status of the selected course must be 'Future'.

   When you register a student into a course that has a substitution pool and the Allow Course Substitution option is enabled, select a course from the list for standard courses that have a substitution pool. After registration into a course that has a substitution pool, changing the selected course can happen only while the course's status is 'Future'.
5. Click **Register**. The first page of the Registration wizard is displayed.

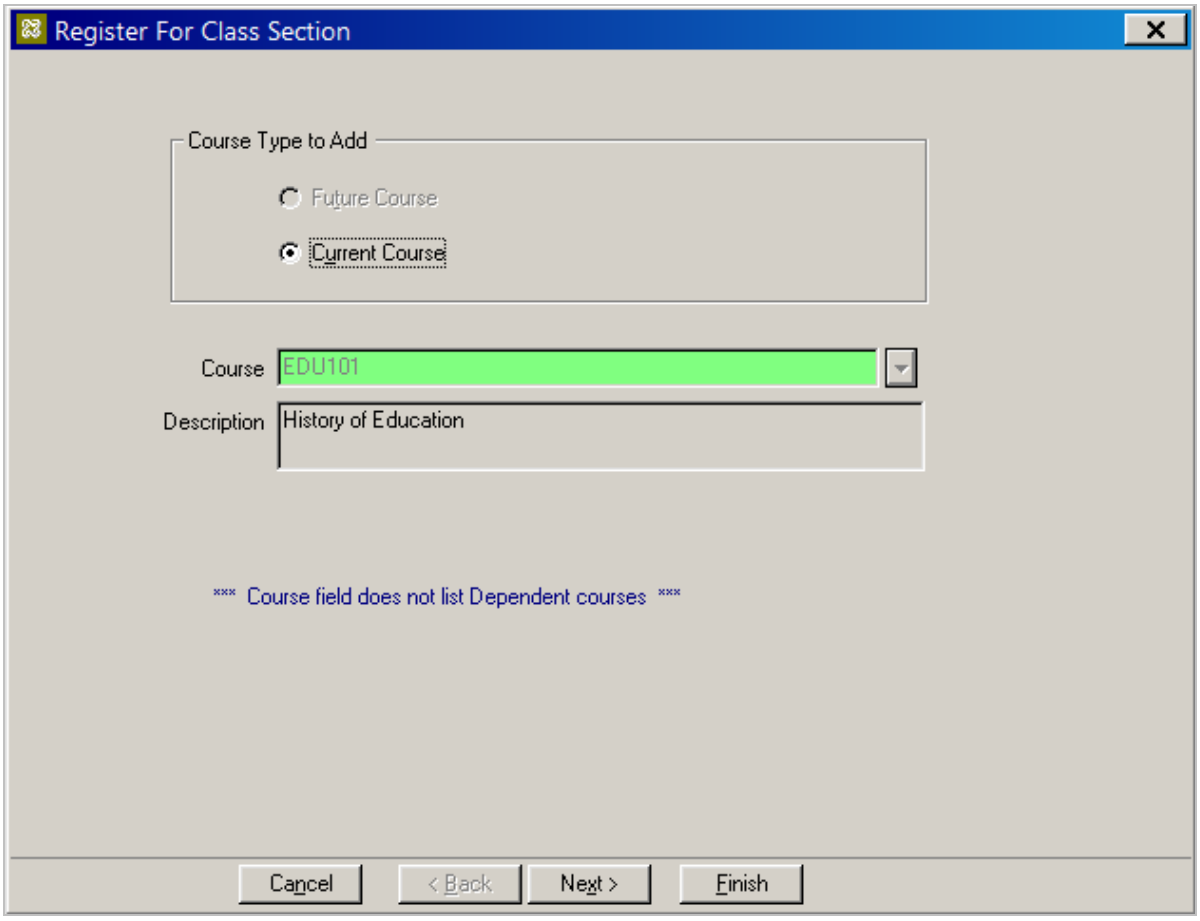
   When you click Register, CampusNexus Student checks if the student:

- Is currently enrolled in the selected course for the selected term.
- Has completed the selected course for the selected term.

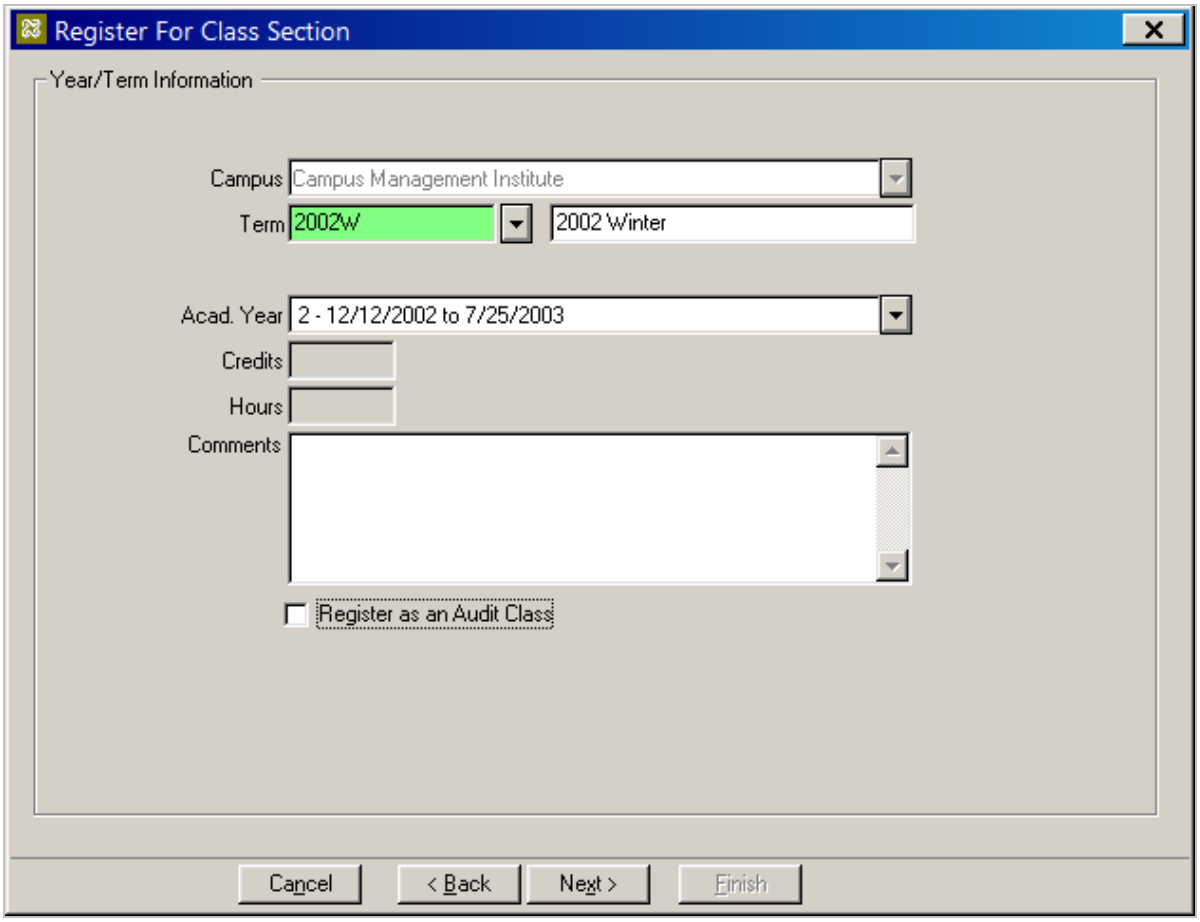
If so, then you are attempting to schedule or register a student in overlapping terms. As a result, CampusNexus Student displays an informational message.

If a student is already registered for the selected class, the Register button is renamed to **Unregister**. Click Unregister to remove a student from the selected class section.

Note: If the selected course is not scheduled for any term, the following message is displayed: *"The selected course is not currently scheduled for any terms."* Click **OK**. You are returned to the Student Schedule form.



6. Click **Next**. Page 2 of the wizard is displayed. The second page will vary. If the course is not a possible retake, page 2 will be similar to this one.



7. The default **Campus** is the campus for the enrollment. You can select a different campus if the student is taking the course at another campus.

   Note: If the student plans to take a cross-referenced course at another campus, you can only view cross-referenced courses at campuses that offer sharing permissions with the campus of the student's current enrollment.

8. Select the **Term**.

   When Term Relationships are used, the **Parent Term** must be selected before the **Child Term**. If the Parent Term is disabled, indicating that the Campus does not use Term Relationships, the Child Term field is labeled **Term**. A Child Term cannot be associated with more than one Parent Term on a Term Summary for an individual enrollment.

9. Select the **Academic Year**.

10. The **Credits** and **Hours** fields are normally a read-only fields.

    If the class being registered is a variable credit course and the specified class section is configured to 'Allow Overrides During Registration', the Credits and Hours fields are grayed out on this form but may be modified in the next step of the wizard after a class section is selected.

    If the class section selected allows overrides during registration, the Credits and Hours fields can be edited. If minimum and maximum credit values were also specified, you can only enter a credit range that is between the specified values.

11. Enter any comments in the **Comment** field. These comments will be printed on class roster reports.

12. Select **Register as an Audit Class** if applicable.

13. Click **Next**. A grid of available Class Sections is displayed.

    If the course for which the student is being registered is a possible retake, the following message is displayed: *"Will this course be considered a Retake?"* Select **Yes** or **No** as required.

    - *Scenario 1*: If there are no retaken courses or equivalents for the registered course, and if the answer to the question is **No**, the Class Section grid is unavailable. Move to the next screen in the wizard.
    - *Scenario 2*: If there is one retaken course or equivalent for the registered course, and if the answer to the question is **Yes**, the grid is unavailable. Move to the next screen in the wizard.
    - *Scenario 3*: If there are multiple retaken courses or equivalents for the registered course, and if the answer to the question is **Yes**, the grid is available. Select a course and move to the next screen in the wizard.

    The message to select the course that is being retaken is displayed only after you select **Yes** to the question *"Will this course be considered as a retake?"* and more than one course is listed in the grid. Select the course that is being retaken.

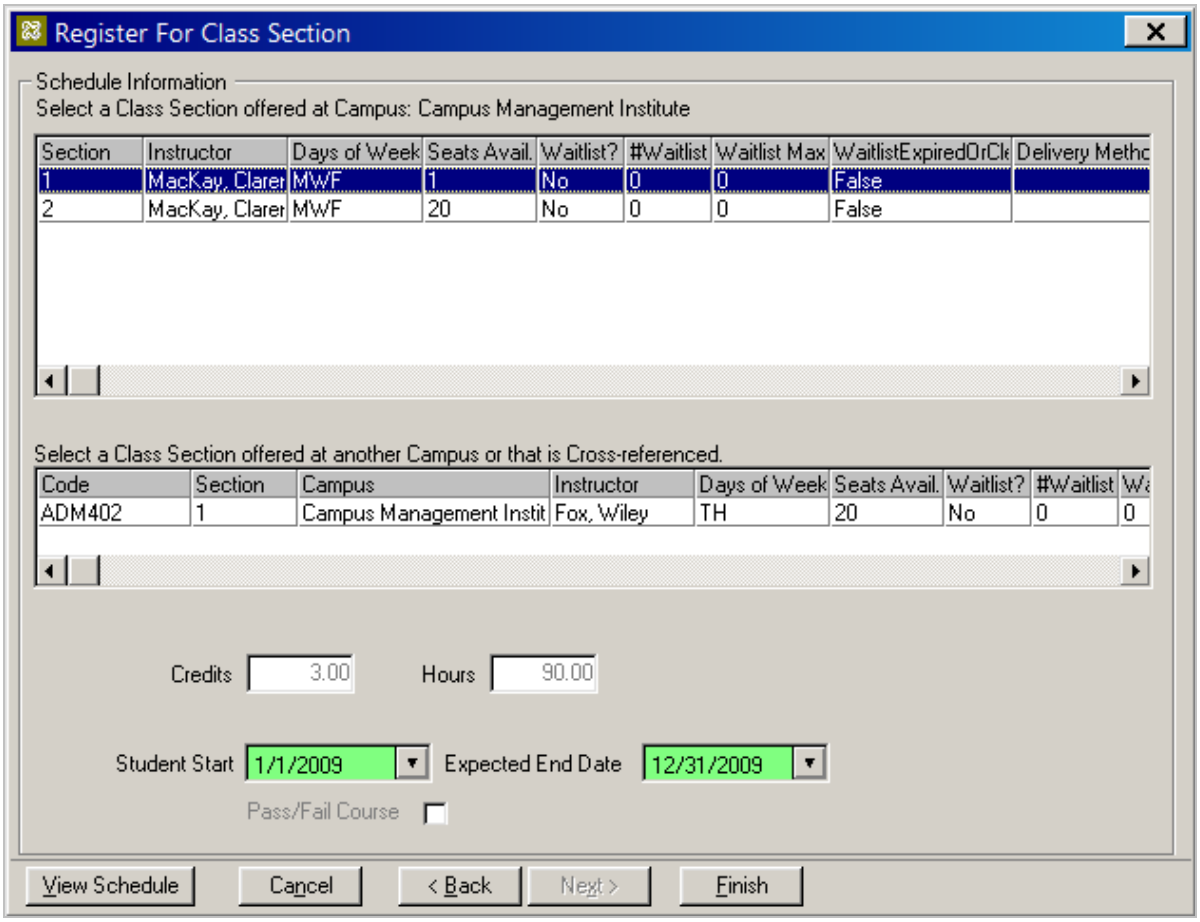
    When you click **Next**, a course in the grid must be selected so that when the update to the enrollment schedule occurs, CampusNexus Student identifies the course as being retaken and correctly updates the Retake Override indicator on that row. When you click **Finish** button on the final form in the wizard, CampusNexus Student updates the Retake Override column for the registered course and, if applicable, the course being retaken.

    The Retake Override column is updated in the following scenarios:

    - If the Retake Override flag for the course being registered is off, CampusNexus Student turns off the Retake Override flag for the course being registered.
    - If no existing posted grades or current scheduled courses are on file for the registered course or any of its course equivalents, CampusNexus Student updates the Retake Override flag with the Retake Override flag for the course being registered.
    - If existing posted grades or currently scheduled courses rows are on file for the registered course, and you answered No to *"Will the course being registered for be considered as a retake?"*, CampusNexus Student turns on the Retake Override flag for the registered course.
    - If existing posted grades or currently scheduled courses rows are on file for the registered course, and you answered Yes to *"Will the course being registered for be considered as a retake?*", CampusNexus Student turns off the Retake Override flag for the registered course and turns off the Retake Override flag for the course selected as being retaken on the Retaken Courses form.

    CampusNexus Student defaults the answer to match the Retake Override setting on the Courses Code Setup form.

14. Select the **Class Section** in which the student is to be registered. The **Student Start** date and **Expected End Date** of the class section are filled in by default. You can change them if necessary for this student.



15. If the Billing Method is configured to use Fee Schedules, a Fee Schedule list box and a View Fees button are displayed. Click **View Fees** to display a listing of the fees applicable to the selected fee schedule.
16. The **Pass/Fail Course** check box is enabled when the Course Section's pass/fail flag has been set to the "Student's Choice" option. The check box is in a 'selected disabled' state when the pass/fail flag has been set to the "Pass/Fail (Required)" indicating that the course will be graded on a pass/fail basis only. The check box is not displayed when the pass/fail flag has been set to "Non-Pass/Fail" indicating that letter grades will be issued for the course. See Course Code Setup for information regarding the pass/fail flag options.
17. Click **View Schedule** to view the course schedule on a weekly or monthly basis.
18. Click **Finish**.

    If you have permissions to waive a retake fee, you are prompted to confirm waiving of the retake fee. Click **Yes** or **No**.

    If student registration lock configuration has been enabled, upon clicking **Finish**, the Registration Locks will be implemented.

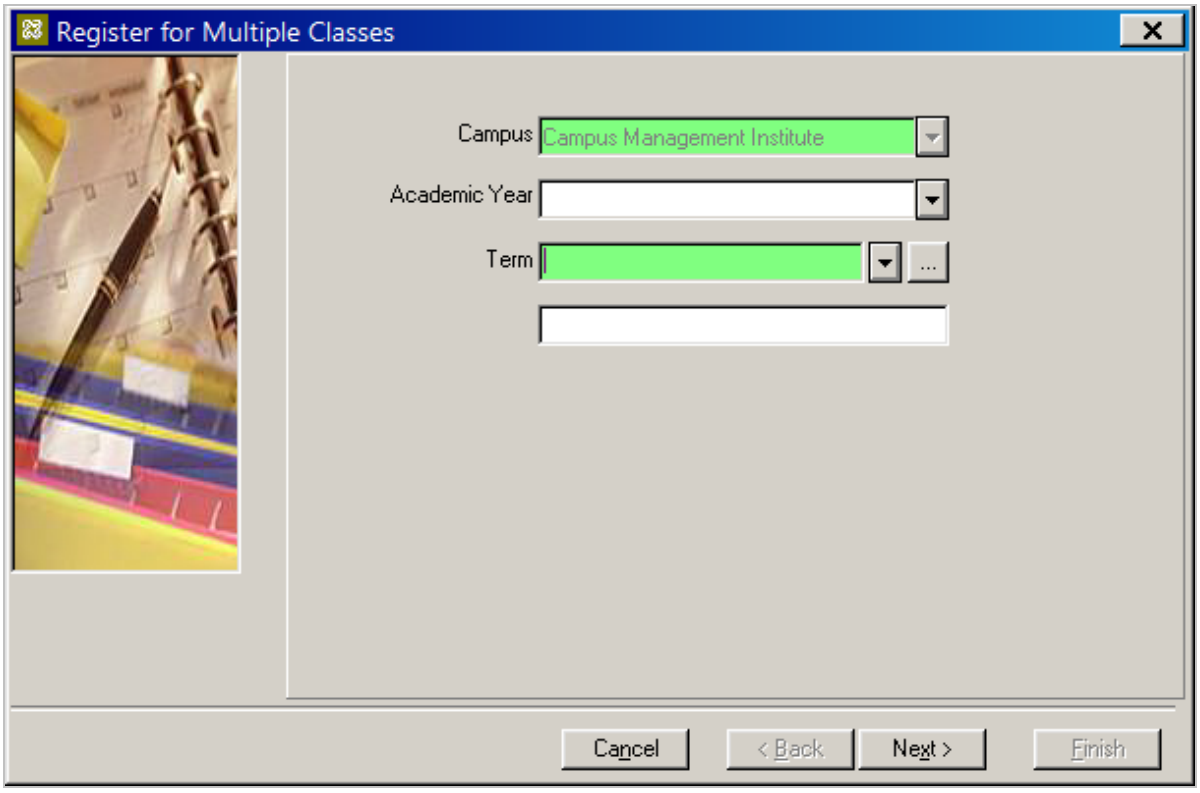
See Unregister Student for details about reversing a student registration.

Registering for Multiple Classes

You can register a student into multiple classes for a term from the Student Schedule form. After registering, the Auto Bill flag is checked. If your school auto-bills by course, the billing routine will be called.

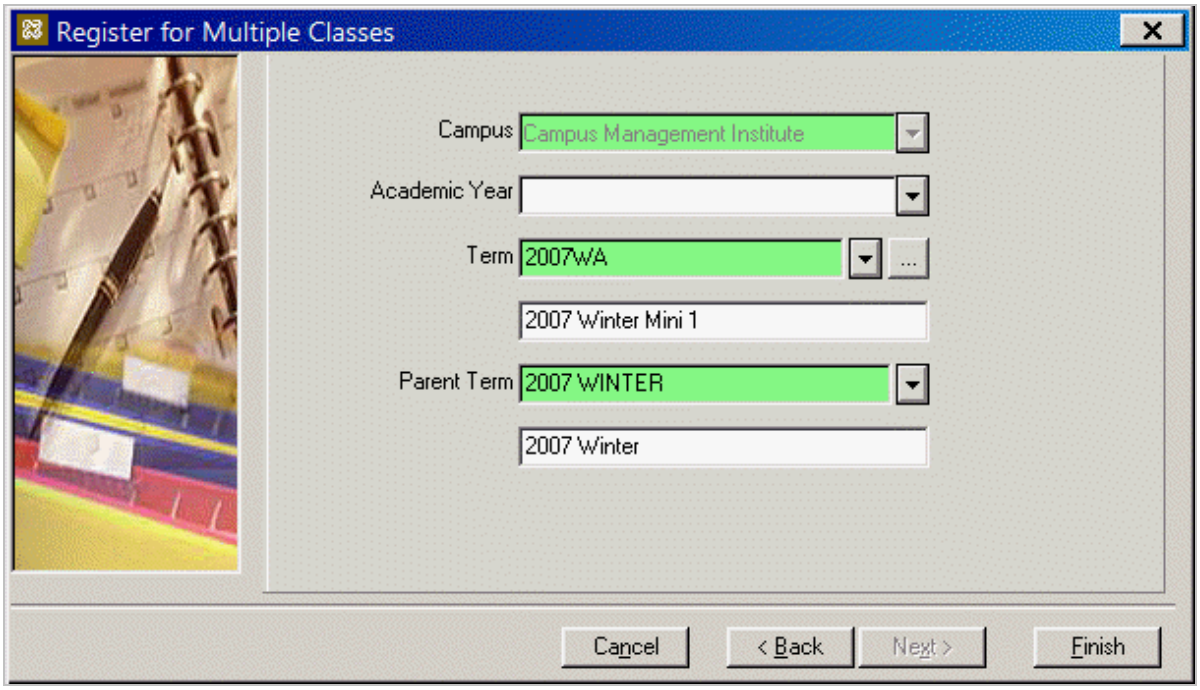
To register a student for multiple class sections:

1. Select a student.
2. Navigate to **View > Academic Records** > **Schedule**. The Student Schedule form is displayed.
3. Filter the list of courses by selecting the **Enrollment**, **Term**, and **Status**.
4. Select the **Courses** into which the student is to be registered.
    - To select consecutive courses, click the first course, then, while holding down the **Shift key**, click the last course in the group.
    - To select nonconsecutive courses, click the first course, then, while holding down the **Ctrl key**, click each of the other courses in which the student is to be registered.
5. Click **Register**. The first page of the Register for Multiple Classes wizard is displayed.

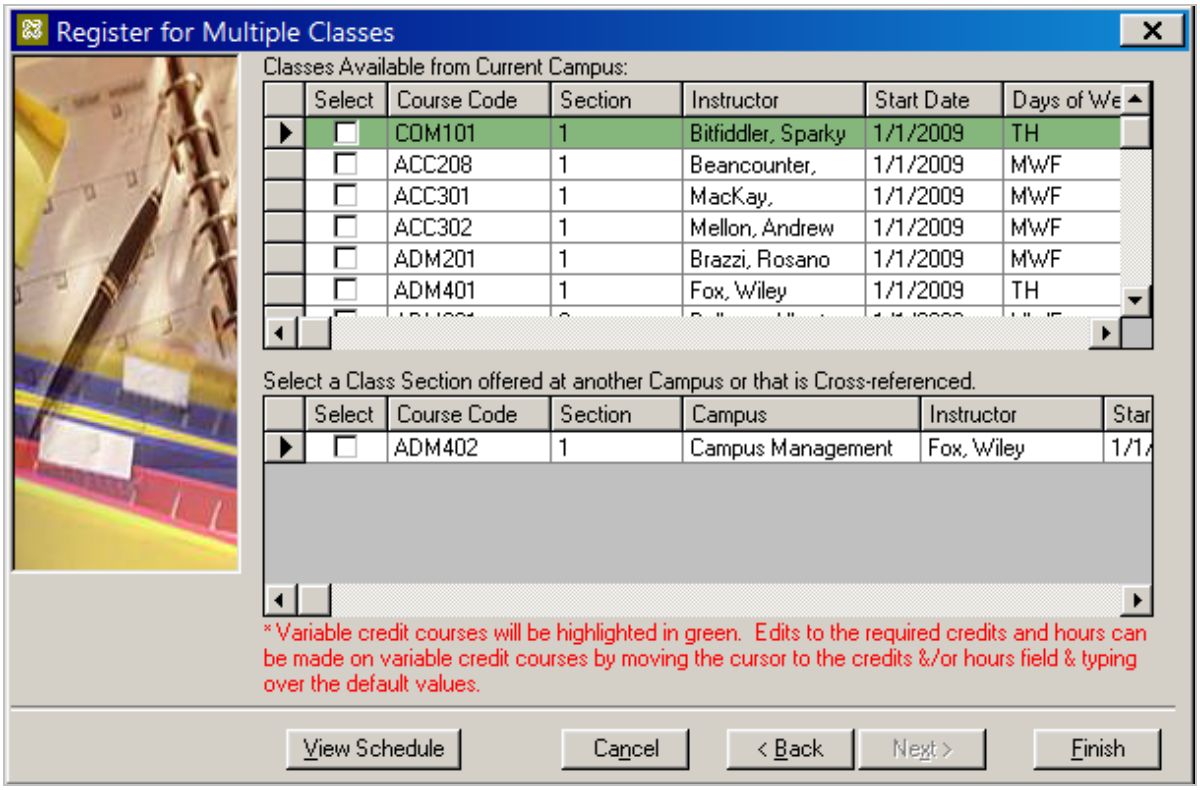


6. Select the **Term** in which the student is to be registered.

    If Term Relationships are being used and the term chosen is a child term, the page is re-displayed with the Parent Term:



7. Select the **Academic Year** that applies to the selected courses.
8. Click **Next**. The next page of the wizard is displayed. This page lists all the available class sections for the courses selected above.



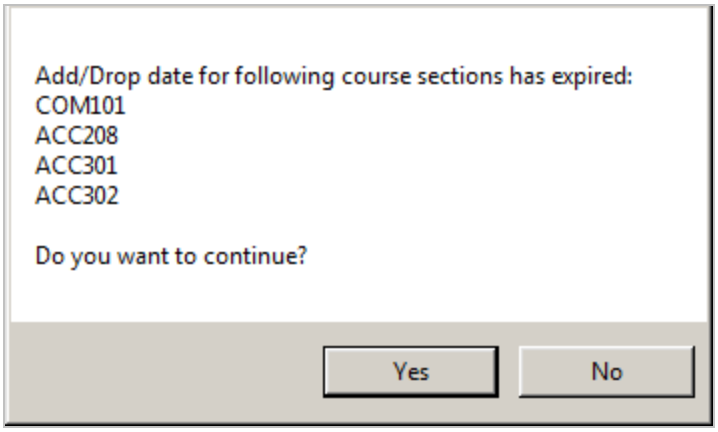
9. In the **Select** column, select the class section into which the student will be registered.

If variable credit courses are included in the course selection, they will be highlighted in green. To change the credits or hours, click on the desired class and move the cursor right to the **Credits**/**Hours** field and typing over the default values.

10. Select View Schedule to view the course schedule on a weekly or monthly basis.
11. Click **Finish**. CampusNexus Student registers the student into the selected class sections.

    If student registration lock configuration has been enabled, upon clicking **Finish**, the Registration Locks will be implemented.

    If there are unfulfilled prerequisites, courses already registered, or other conflicts, a corresponding message is displayed. Answer any messages as they arise. If you have override permissions, you can override the warning messages. If you do not have override permissions, the override option is not displayed.



    Notes:

    - If student registration lock configuration has been enabled, upon clicking **Finish** during course registration for multiple course registration, the Registration Locks is evaluated.
    - During course registration, if at least one applicable Schedule Change Lock registration lock type exists, you cannot register the course.
    - Courses taken as an 'Audit Class' are handled the same way as non-audit courses with regard to the Schedule Change Lock registration lock type.
    - Maximum Limit and Minimum Limit registration lock types do not apply to courses registered as an 'Audit Class'.
    - If a course being registered is cross-referenced to another course, the registration lock evaluation logic uses the credits/enroll status credit/enroll status hours/hours from the course it is cross-referenced to, not the actual course being registered.
    - If the student's billing method is set to use Fee Schedules, CampusNexus Student uses the course section's default fee schedule to bill the student. Otherwise the student is billed based upon the student's billing method, rate schedule, and the default fee schedule for the courses.
    - If you have permission to waive a retake fee, you will receive a message at the time of retake course registration prompting you to waive the retake fee. If you select **Yes**, the retake fee will be waived. Otherwise, the retake fee will be charged.

12. When the registration procedure is completed, you are returned to the Student Schedule form. The courses you

selected for registration are displayed with a status of "Scheduled".

13. Click **Close** to close the form.

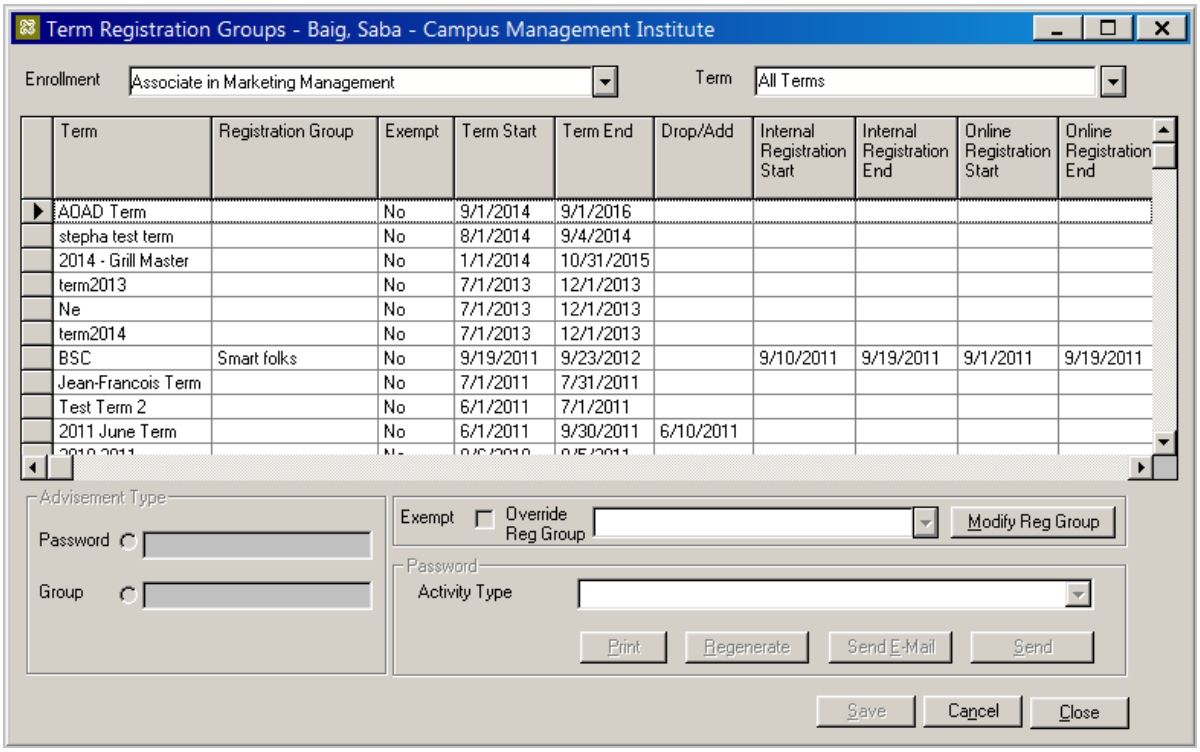
See Unregister Student for details about reversing a student registration.

Managing Registration Groups

Registration groups are used to assign priority to students during a term's registration period. Institutions can create registration groups using a number of variables and assign allowable registration periods to each group. Registration groups serve to sequence and control the registration process for groups of students simultaneously. In some instances, students may be exempt from a registration group consideration, or they need to adhere to dates of another registration group.

To work with registration groups:

1. Select a student.
2. Navigate to **View** > **Academic Records** > **Schedule**. The Student Schedule form is displayed.
3. Filter the list of courses by selecting the **Enrollment**, **Term**, and **Status**.
4. Click **Registration Groups** to view the Term Registration Groups form. This form displays all registration groups associated with this student.



5. Authorized users can override student registration groups to allow the institution to address special student requests and other situations where enforcement of registration groups on specific students is not desired. This feature affects both internal and online registration groups.

   Only staff members with access to override registration groups (Setup > Staff > User Options: Allow user to override registration group constraint) can modify or override student registration groups.

   Authorized users can exempt a student from registration group consideration for a specific term as well as modify the student registration group for a term. If the registration group is associated with a student advisement group, a student can be removed from the group by modifying the group or exempting the student from the group.

   When you click **Modify Reg Group**, all registration groups are displayed.

6. Click **Passwords** to create passwords for specific sections (used for online registration).
7. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Reinstating a Course

You can reinstate students into courses they were previously registered in but now have a status of Drop or LOA (Leave of Absence). The reinstate option is available when students return to the same course sections in the same term into which they were originally registered.

Before reinstating a course you must confirm that the course has not ended yet. You can determine if the course already ended by checking if the system date is greater than the end date of the course. If the course section has already ended, and you attempt to reinstate the student, a warning message is displayed asking if you still want to reinstate the student.

To reinstate a student into a course:

1. Select a student.
2. Navigate to **View > Academic Records > Schedule**. The Student Schedule form is displayed.
3. Filter the list of courses by selecting the **Enrollment**, **Term**, and **Status**.
4. Select the class section on the student's schedule that has a status of **Dropped** or **LOA**.
5. The Drop button is now labeled 'Reinstate'. Click **Reinstate**.
6. A confirmation message is displayed. Click **Yes**.
7. CampusNexus Student checks if there are any prerequisites or corequisites for the course being reinstated. If the course to be reinstated does not meet all prerequisite or corequisite requirements, a message is displayed listing the prerequisite and corequisite requirements of the course. You may click on the highlighted areas of the message to view additional details about the prerequisite and/or corequisite requirements.
    - If you have permission to override prerequisite and corequisite rules for registration, the following message is displayed: *"Do you wish to override the course prerequisites/corequisites?"* Click **Yes** to proceed with the reinstatement.
    - If you do not have permission to override prerequisite and corequisite courses for registration, CampusNexus Student does not allow you to reinstate the course.
8. When the reinstatement is completed, the course status reverts to its previous status and posted grades for the course are removed. The status change is recorded in the Course Status Change Audit folder. To view the audit, navigate to **View > Academic Records > Audit > Course Status Change Audit**.

    The Old Status is 'Dropped' or 'LOA' and the new status is 'Current' or 'Scheduled'.

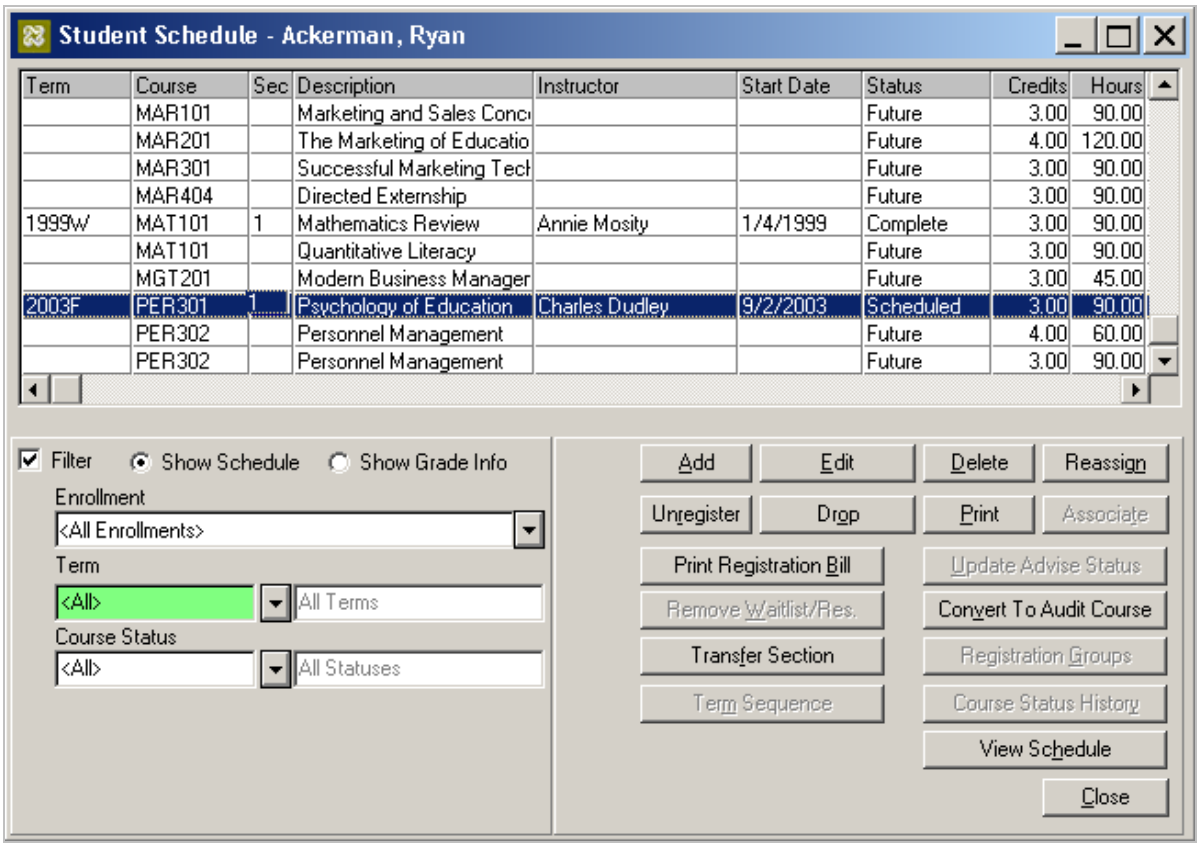
Transferring a Course Section

You can transfer a student to another course section using the Transfer Section button on the Student Schedule form. The course to be transferred must be in 'Scheduled', 'Current', or 'LOA' status. If lesson grades are associated with the original class section, these will be deleted.

To transfer a student to another course section:

1. Select a student.
2. Navigate to **View** > **Academic Records** > **Schedule**. The Student Schedule form is displayed.
3. Filter the list of courses by selecting the **Enrollment**, **Term**, and **Status**.
4. Select the **Course Section** to be transferred.

   Note: The Transfer Section button is enabled for courses with a 'Scheduled', 'Current', or 'LOA' status.



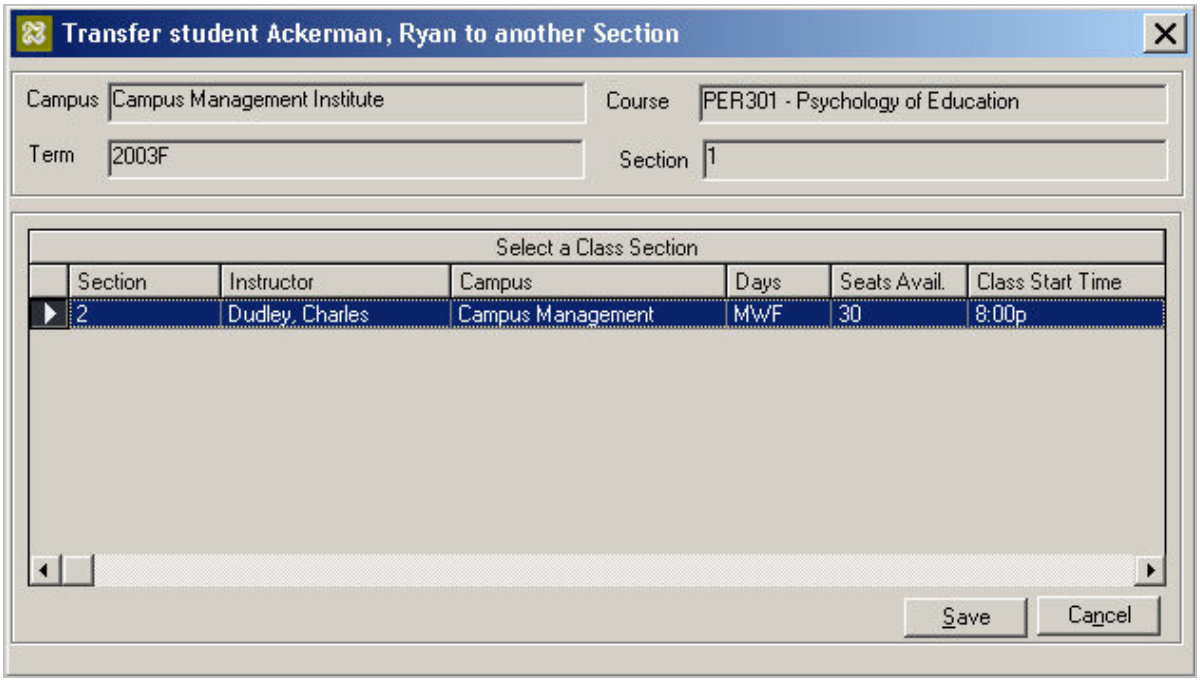
5. Click **Transfer Section**. The 'Transfer student <student name> to another Section' form is displayed. It shows all sections available for the selected course. If the campus is sharing courses, shared class sections will be listed as available choices.

   Note: If student registration lock configuration has been enabled, upon clicking **Transfer Section**, the Registration Locks will be evaluated.

6. Select a **Course Section** from the list. The student will be transferred from the original course section to the course section listed in the Transfer student form.
7. If the class being registered is a variable credit course and the specified class section is configured to 'Allow

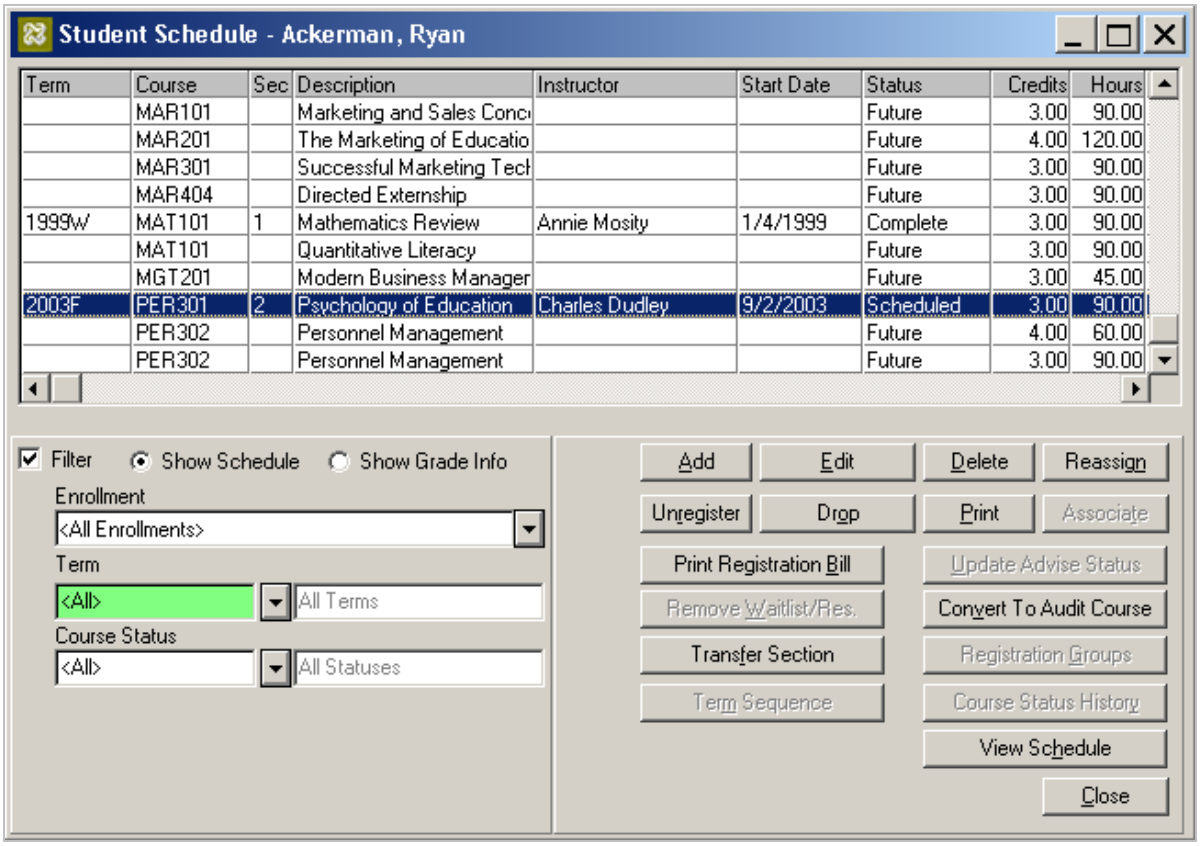
Overrides During Registration', you can modify the **Credits** and **Hours** that the student will be attempting.

8. Click **Save** to continue processing, or click **Cancel** to close the form without making the transfer.



9. A confirmation message is displayed. Click **OK**.

   The new course section is displayed in the Student Schedule form upon completion of the Transfer Section process.



The class section transfer is reflected in the student's Grade Audit and the student's Status History folder.

Note: The system date and time at which the transfer section occurred governs what attendance can be entered for a student for a specified section. Attendance remains with the original section once a transfer section occurs. If a user does not desire to retain attendance records, use unregister and register rather than transfer section.

For example

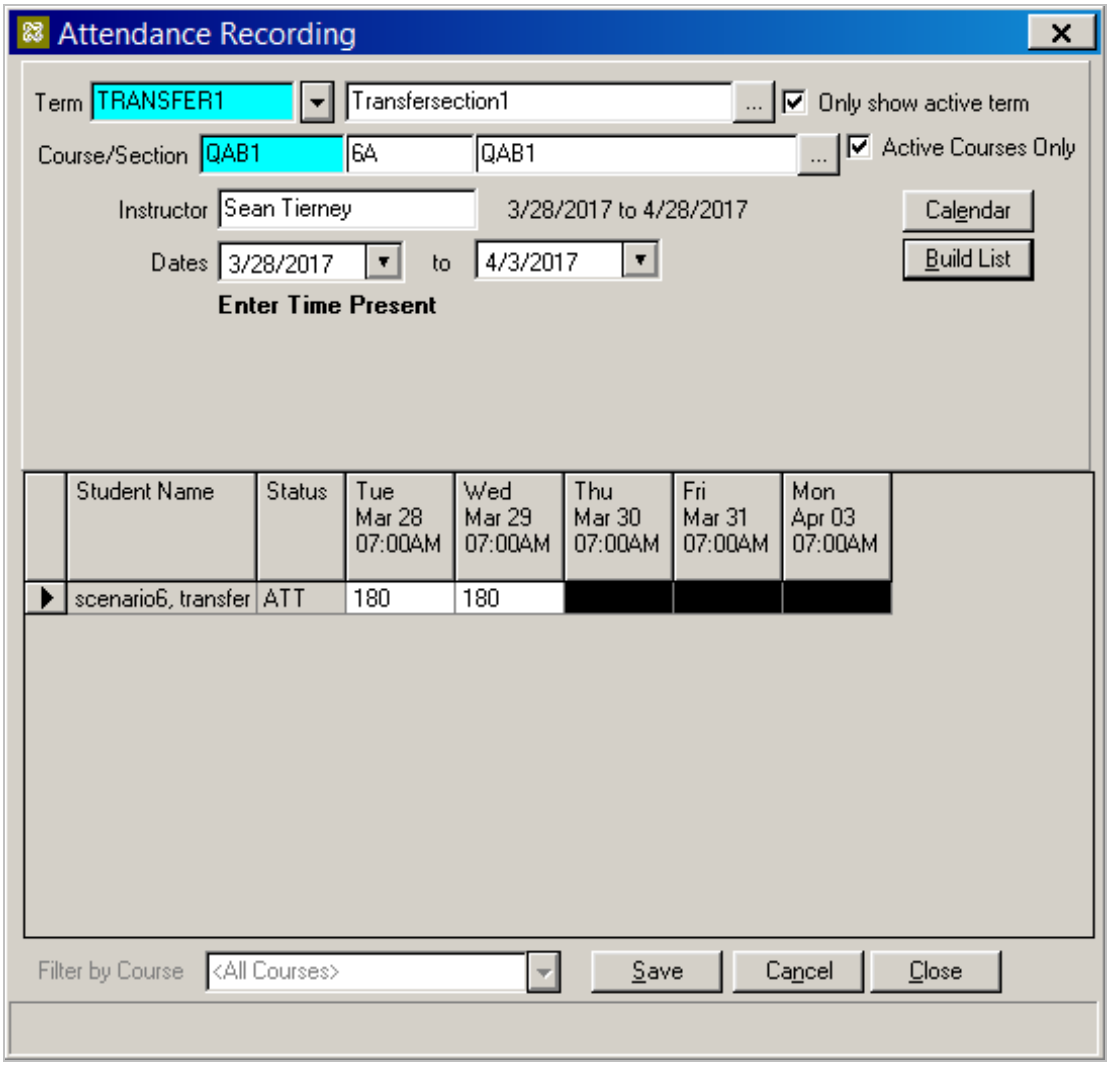
A student is registered in Section A, meeting at 7:00 a.m. for 3 hours (180 minutes) on Monday through Friday, and transfers to Section B, meeting at 2:00 p.m. for 3 hours (180 minutes) on Monday through Friday, with the transfer taking place at 12:00 p.m. on Wednesday.

The following highlighted days and times should have attendance available for entry:

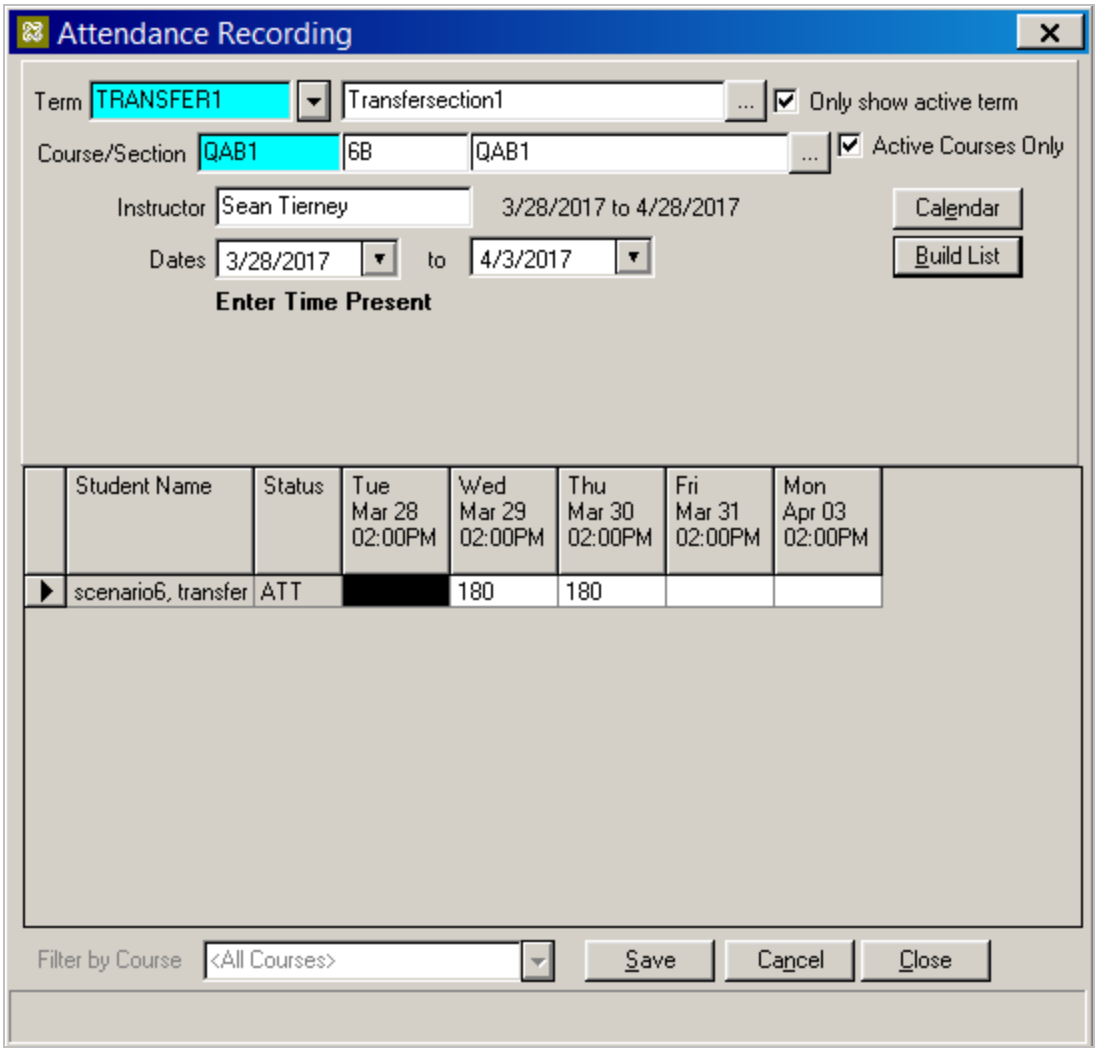
Transfer occurs at 12:00 p.m. Wednesday					
Monday	Tuesday	Wednesday	Thursday	Friday	SECTION
7:00 a.m.	7:00 a.m.	7:00 a.m.			A
		2:00 p.m.	2:00 p.m.	2:00 p.m.	B

The student will continue to show on attendance entry forms but will have the dates that are unavailable for entry blacked out in the form.

Section A Post-Transfer



Section B Post-Transfer



Best Practices Note: Users need to be aware that the selection of the **Class Meets at Various Days/Times** check box on the Class Schedule form takes precedence over any configured schedule in the system. Using this check box along with a configured schedule should be avoided as it can cause unpredictable results in attendance.

Unregistering a Student

Once a student is registered in a class section, the 'Register' button on the Student Schedule form changes to 'Unregister'. The Unregister option is available to correct situations in which a student was mistakenly registered. It is not to be used if a student drops a class section after classes begin.

Occasionally, a student enrollment needs to be reversed. To cancel an enrollment, it becomes necessary, among other things, to "unregister" the student from some class sections. To cancel an enrollment all the student's courses must be set to "Future" status. This is accomplished using the Unregister option.

Note: CampusNexus Student does not allow a course to be unregistered if it fulfills a prerequisite or corequisite requirement for another course in which the student is registered. A message is displayed containing the prerequisite and corequisite rules applicable to that course. The course may only be unregistered if:

a. Any courses whose prerequisite requirements were being fulfilled by the course being unregistered are removed (by unregistration) first;

b. You have permissions to override prerequisite and corequisite requirements.

When a course is removed from a student's schedule, by deleting or unregistering, CampusNexus Student recalculates values in the enrollment term summary form, for example, the last date of attendance (LDA).

Any Course Status change is retained and posted to the Audit folder within the Course Status Change Audit tab. You can access the Audit folder through the Course Status History button on the Student Schedule.

Course Section Add/Drop Validation

During registration and unregistration, the 'Add/Drop Flag' for the campus is checked to determine what type of add/drop validation needs to take place. For more information, see Add/Drop Flag.

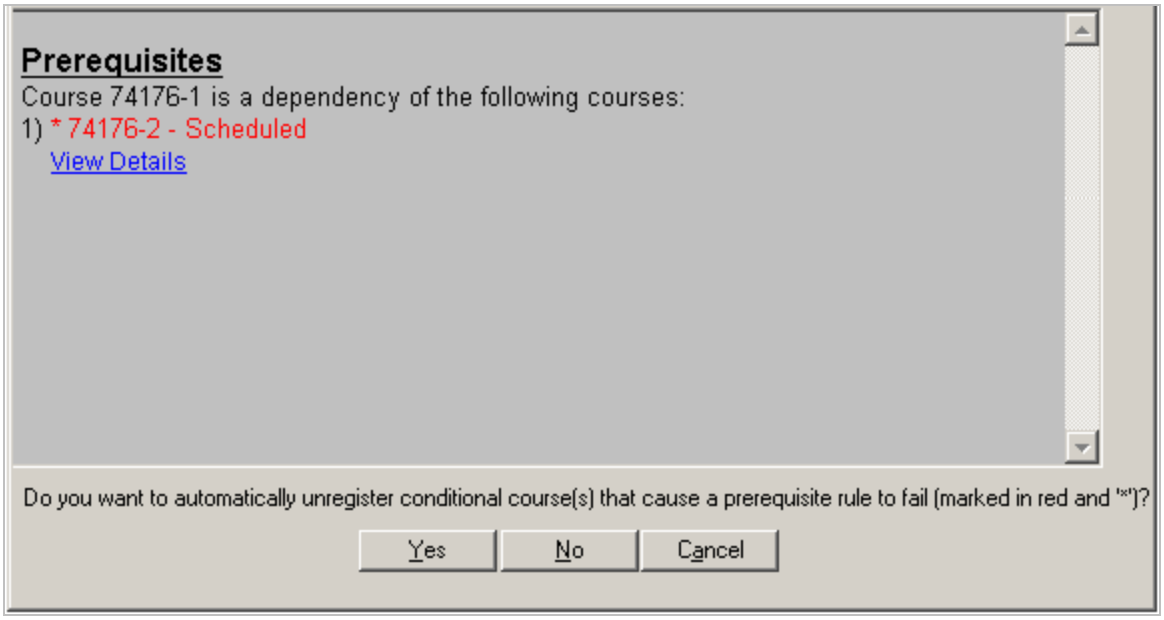
Note: If automatic unregistration is turned ON for the campus, CampusNexus Student applies all Add/Drop rules when automatically unregistering a conditional course.

To unregister a student from a class section:

1. Select a student.
2. Navigate to **View** > **Academic Records** > **Schedule**. The Student Schedule form is displayed.
3. Filter the list of courses by selecting the **Enrollment**, **Term**, and **Status**.
4. Select the **Class Section** to be unregistered. Only Current Class Sections can be unregistered. Future Class Sections are not yet registered. Completed Class Sections cannot be unregistered.
5. Click **Unregister**.

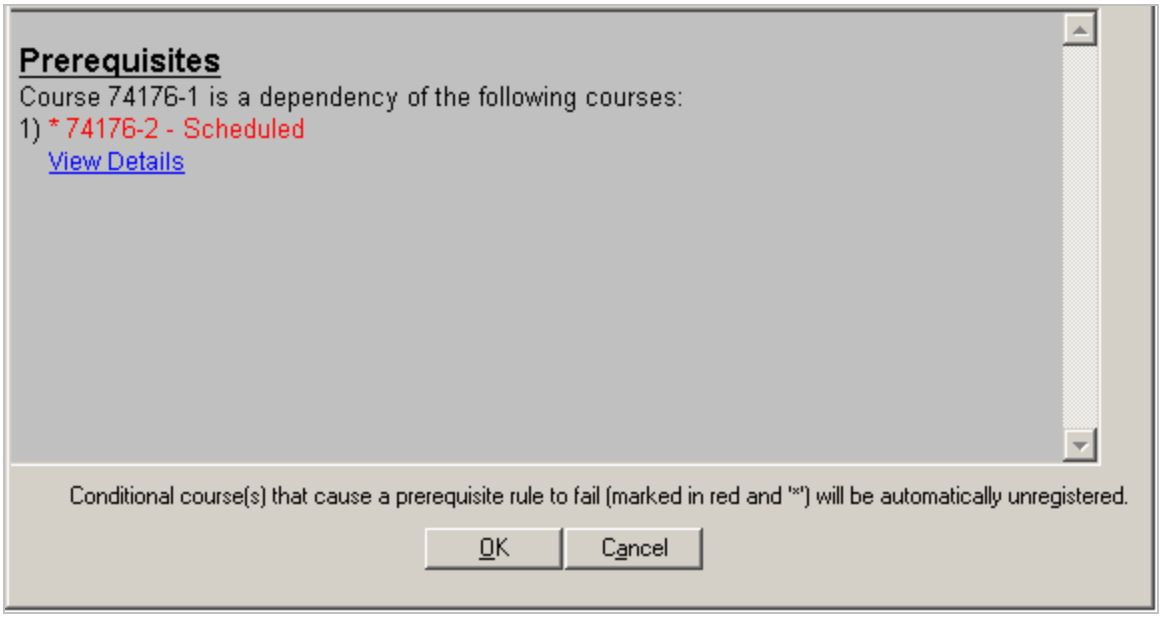
   CampusNexus Student checks if the course to be unregistered fulfills prerequisite or corequisite requirements for any other courses. If the course to be unregistered does fulfill a prerequisite or corequisite requirement, a message is displayed indicating the prerequisite and/or corequisite rules that would be broken if the course was unregistered.

   If campus is configured for automatic unregistration of conditional courses:
   If you have permission to override prerequisite and corequisite rules for Drop/Unreg, the following message is displayed: *Do you want to automatically unregister conditional course(s) that cause a prerequisite rule to fail?*



If you click **Yes**, the conditional courses will be unregistered and the prerequisite course will be unregistered. If you click **No**, only the prerequisite course will be unregistered. If you click **Cancel**, the action will be cancelled and no course(s) will be unregistered.

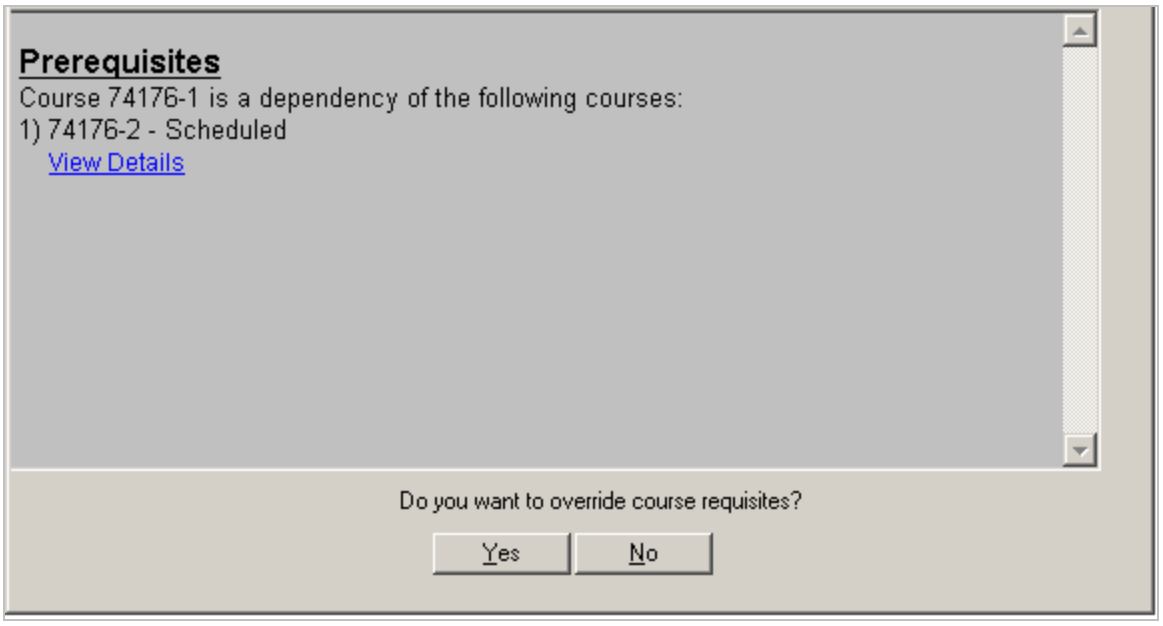
If you do not have permission to override the prerequisite and corequisite rules, the following message is displayed: *"Conditional course(s) that cause a prerequisite rule to fail will be automatically unregistered."*



If you click **OK**, the conditional course(s) will be unregistered and the prerequisite course will be unregistered. If you click **Cancel**, the action will be cancelled and no courses will be unregistered.

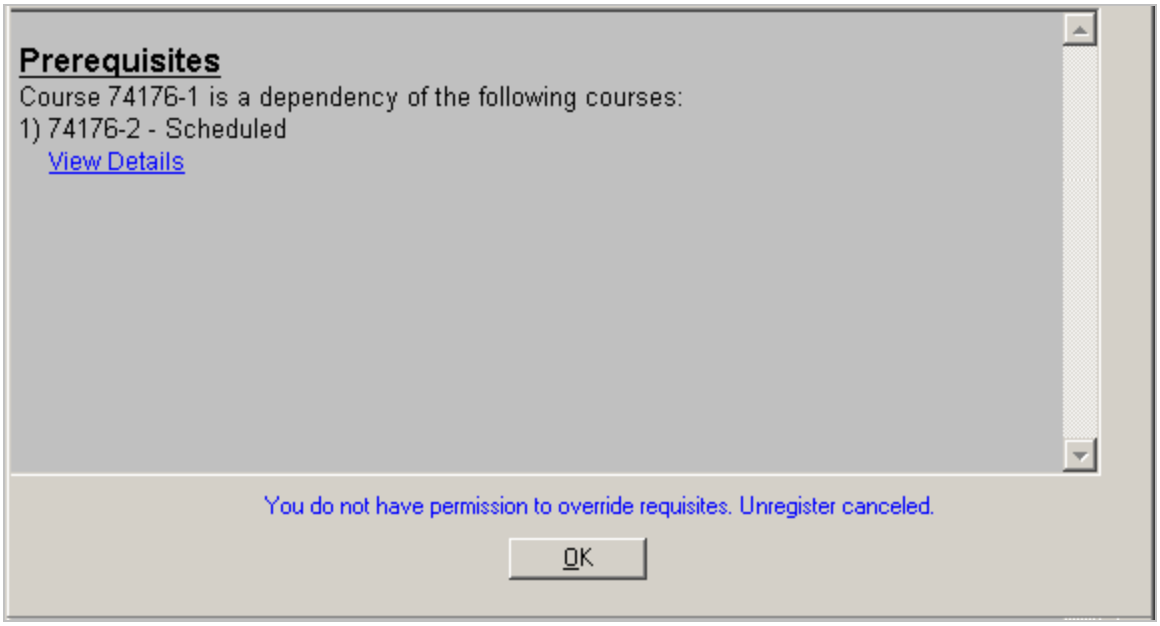
If campus is not configured for automatic unregistration:

If you have permission to override prerequisite and corequisite rules for Drop/Unreg, the following message is displayed: *"Do you want to override the course requisites?"*



If you click **Yes**, the prerequisite course will be unregistered, but the conditional course(s) will not be unregistered. If you click **No**, the process will terminate.

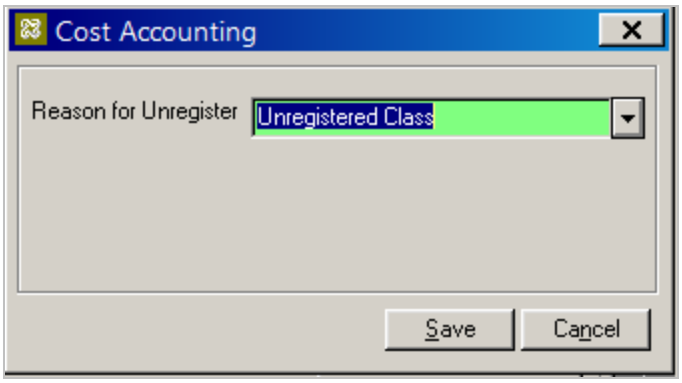
If you do not have permission to override the prerequisite and corequisite rules, the following message is displayed: *"You do not have permission to override requisites. Unregister canceled."*



When you click **OK**, the process will terminate.

Note: If student registration lock configuration is enabled, upon clicking the **Unregister** button, the Registration Locks will be evaluated.

6. Select a **Reason** for unregistering the course. See Course Reason Code Setup for additional information.



Note: The status and reason for the class section will be changed to 'Future'. The Term, Section number, Instructor, and Start Date will all be deleted.

7. Select **Save** to continue or **Cancel** to exit. You are returned to the Student Schedule form.
8. Select and unregister any other courses as necessary.
9. Click **Close** to close the form.

Attendance

Use the Student Attendance form to review attendance data for a student. You can filter the list of class sections by enrollment, term, or by the student's status in class. CampusNexus Student defaults to the current enrollment when accessing this form. For any selected class section, you can review the student's attendance and, if necessary, make adjustments.

When editing attendance information, the last date of attendance (LDA) will be recalculated after the information is saved.

Ordinarily, attendance is posted in batches as a daily procedure. You can see the procedures for this at Daily > Academic Records > Attendance > Record Attendance.

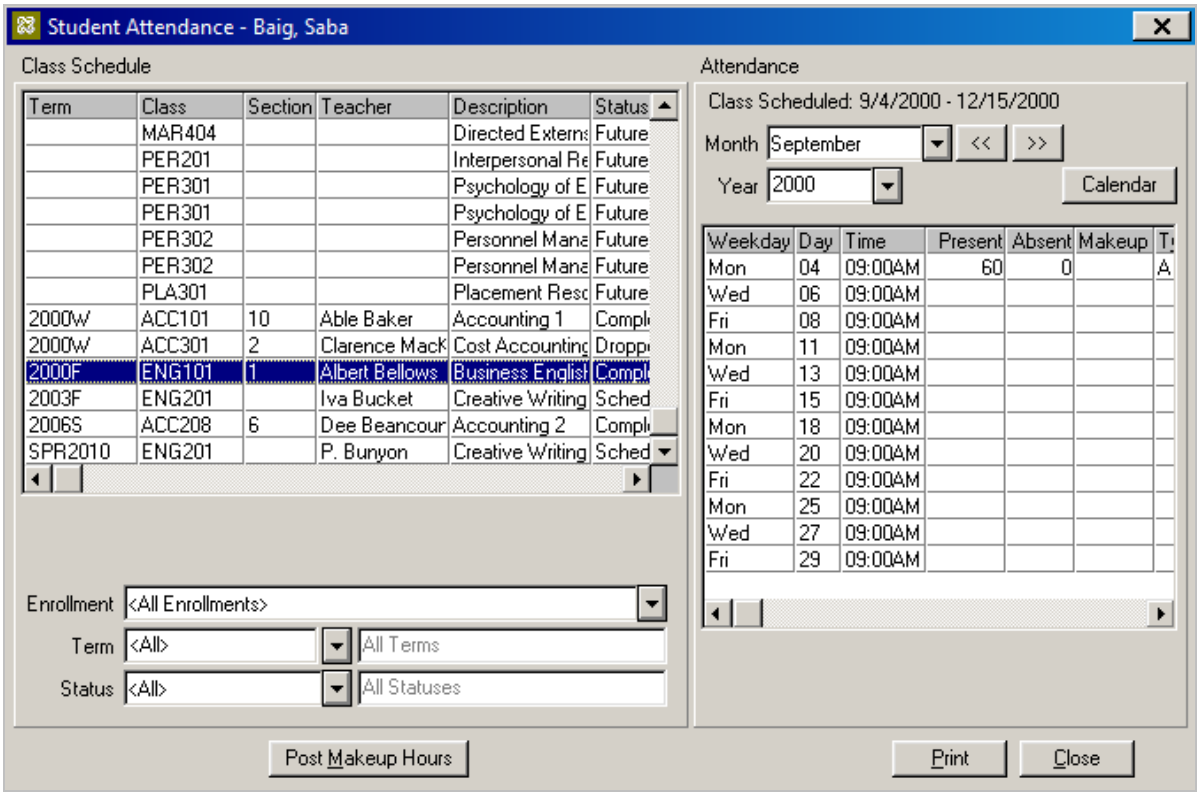
Note: All available classes are displayed and can be properly recorded (before and after the change) when a section change is performed with any of the following methods:

- Student in the Portal
- Staff member in the Portal
- In CampusNexus Student

This includes classes with multiple meeting periods scheduled on the same day. Class records are available for editing, display, and reporting regardless of the student attending or not attending an available course section. All eligible classes from the original section a student transferred from remain eligible for attendance, even if attendance has already been entered for one meeting period that day.

To view or post attendance for a student in a selected class section:

1. Select a student.
2. Navigate to **View** > **Academic Records** > **Attendance**. The Student Attendance form is displayed.

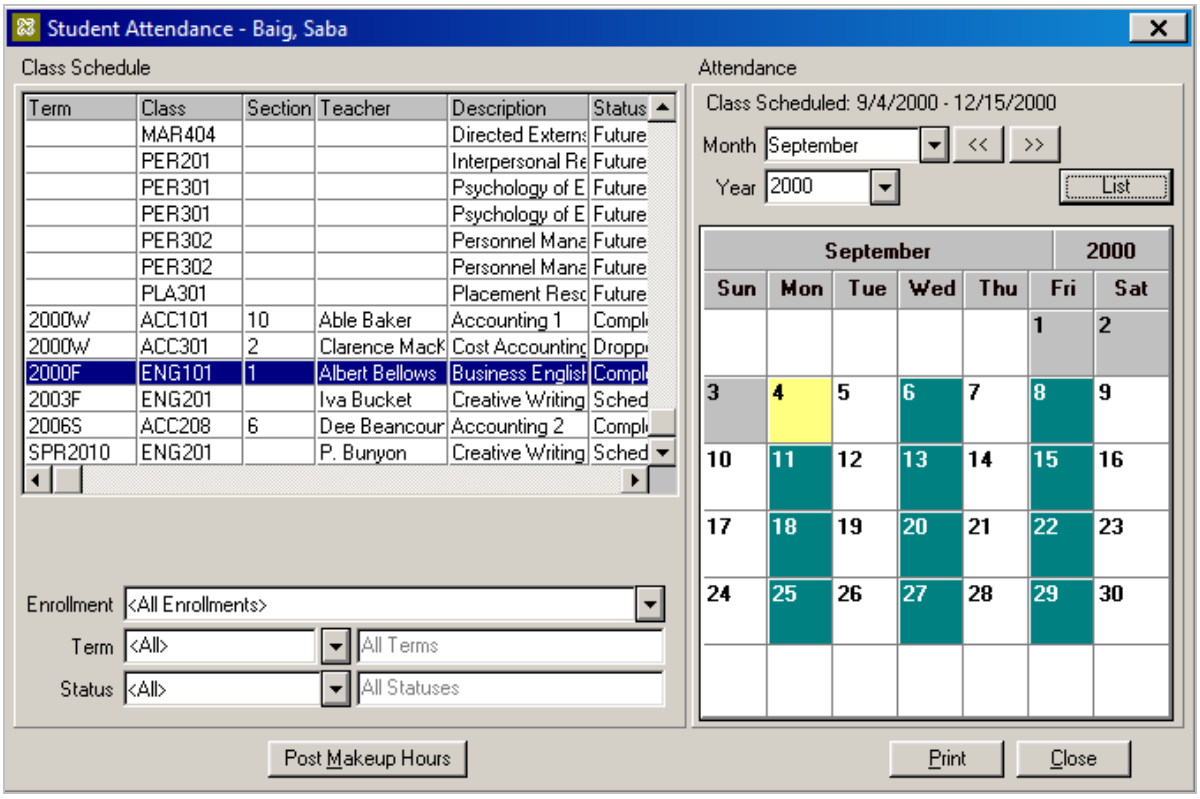


3. Click **Calendar** to see the student's attendance in a calendar-style format.

The color code is as follows:

- Yellow – The dates colored in yellow have had attendance posted.
- Green – The dates colored in green have not had attendance posted.
- White – No attendance is required on the dates colored white.
- Gray – Dates colored gray are before the start date of the class section or after the end date.

When the form is shown in this format, click **List** to return to the other format. Double-clicking a date also returns you to the List format.



4. Select the **Enrollment**, **Term**, and/or **Status** for which you want to view attendance. The list of class sections is displayed on the left side of the form under **Class Schedule**.

   Status on this form refers to the student's status in the selected class section. The options are:

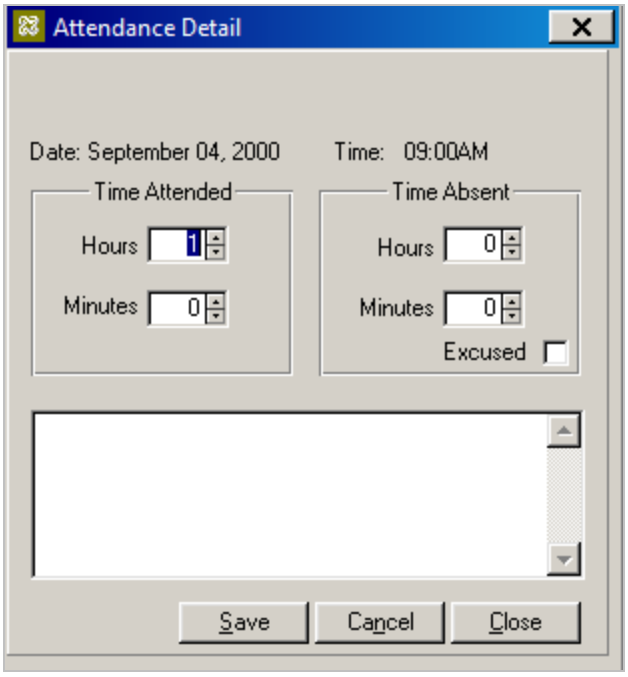
   - All
   - Currently Taking
   - Scheduled
   - Future-Not Scheduled
   - Dropped Class
   - Grade Posted
   - Leave of Absence

5. Select the **Year** and **Month** for which attendance is to be reviewed. The date range in which the class is offered is shown at the top right side of the form.

6. For any selected date on the Attendance grid, double- click it or click **Post Externship Hours** to view the Attendance Detail form.

Note: The name of the button is **Externship Hours** or **Online Hours** depending on how the course was set up in Lists > Academic Records > Courses.

7. On the Attendance Detail form, enter **Time Attended**, **Time Absent**, and mark an absence as **Excused**. You can also enter a comment to explain the entry.



Note regarding attendance posting and impact on conditional courses:
The Save functionality on the Attendance Detail form is such that the course will be dropped automatically on attendance posting if the student's absence time is greater than or equal to the time configured on the Class Schedule Attendance Rules tab. Excused absences are excluded from the auto drop process.

If this course is a prerequisite course, and if the campus is configured accordingly (see Descriptions of Fields on the SAP/Grades/Registration Tab), conditional courses will be automatically unregistered when this prerequisite course is automatically dropped due to attendance rules that cause the prerequisite rule to fail.

Note regarding students earning by Attended Hours:
A check is performed to see if Prevent Attendance Posting is enabled. If so, a further check is performed to determine whether the user has permission to post against the date selected if the date selected is prior to the campus Last Earn Date. If the date selected is between the begin and end date of the unexpired records, the user is allowed to post. Otherwise, the custom message or the default message is displayed, depending on the configuration.

Note: The system date and time at which the transfer section occurred governs what attendance can be entered for a student for a specified section. Attendance remains with the original section once a transfer section occurs. If a user does not desire to retain attendance records, use unregister and register rather than transfer section.

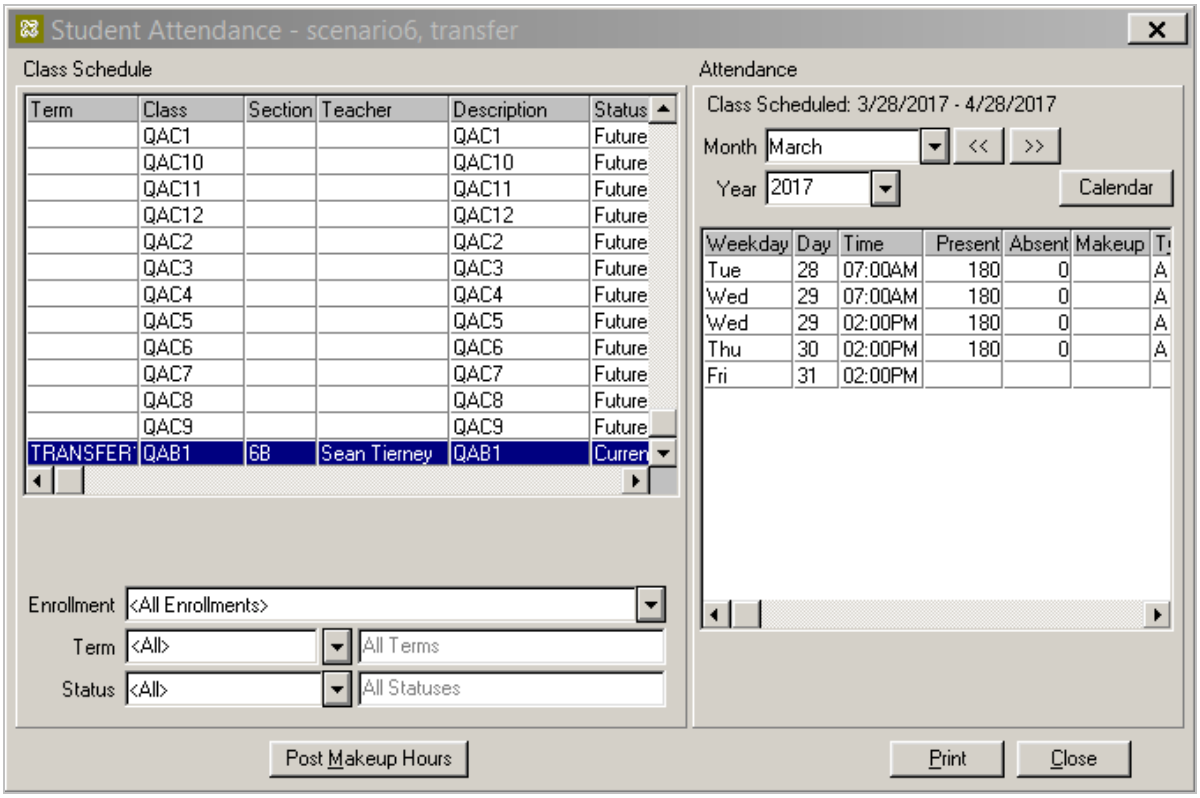
For example

A student is registered in Section A, meeting at 7:00 a.m. for 3 hours (180 minutes) on Monday through Friday, and transfers to Section B, meeting at 2:00 p.m. for 3 hours (180 minutes) on Monday through Friday, with the transfer taking place at 12:00 p.m. on Wednesday.

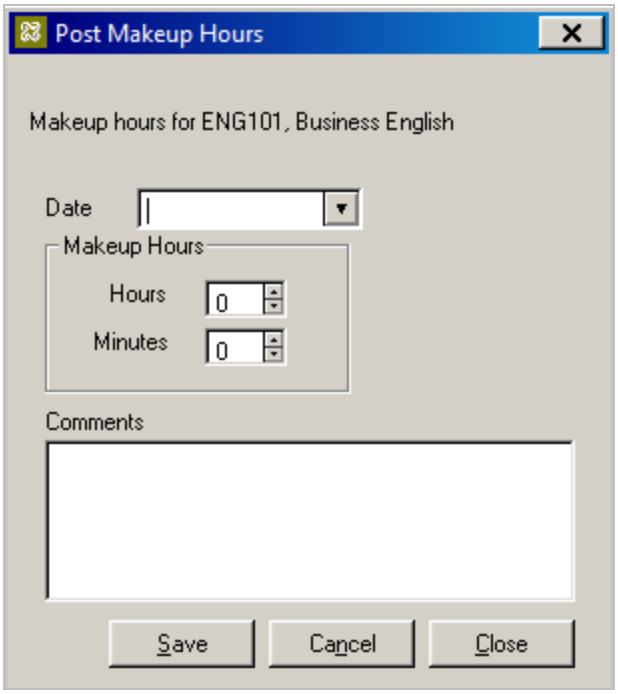
The following highlighted days and times should have attendance available for entry:

Transfer occurs at 12:00 p.m. Wednesday					
Monday	Tuesday	Wednesday	Thursday	Friday	SECTION
7:00 a.m.	7:00 a.m.	7:00 a.m.			A
		2:00 p.m.	2:00 p.m.	2:00 p.m.	B

The student's attendance from the prior section will continue to show on the View > Attendance form if attendance was entered prior to the transfer. If attendance needs to be posted for the dates registered in the prior section, the user will have to post that attendance through Daily >Academic Records > Attendance or through the Staff Portal.



8. You can post makeup hours by clicking **Post Makeup Hours**. The Post Makeup Hours form is displayed.



Note: If the Makeup hours date is AFTER the student's last date of attendance (LDA) or the student's last date of attendance has not been defined, and the status is "Current", "Complete", or "LOA", then the LDA date on the enrollment folder is updated.

Note regarding students earning by Attended Hours:
A check is made to determine whether the date entered is prior to the Last Earn Date for the campus. If so, and the student is earning by Attended Hours, then another check is performed to see if the user has permission to post attendance for the date entered. If the date selected is between the begin and end date of the unexpired records, then the user is allowed to post. Otherwise, the custom message or the default message is displayed, depending on the configuration.

9. Click **Save** to save any changes you made to Post Makeup Hours.
10. Click **Save** to save any change you made to the Detailed Attendance record.
11. After selecting a class section, year, and month, click **Print** to print a list of the student's attendance records for the month.

    Note: If the student's attendance record has old attendance data that has been archived, the words **Archived Attendance** will appear on the form. An additional button, **Recall Attendance**, will appear at the bottom of the form to allow you to retrieve old attendance data from the archive records, if necessary.

    This report enables you to quickly review detailed attendance for an individual student. When the **Print** button is selected, a drop-down list is displayed including Schedule, Attendance, Lesson Status, and Lesson Labels. When the user selects **Attendance**, this report will be run.

Lessons

The Student Lesson Schedule form is used to monitor progress on lessons, exams, and book reports undertaken by the student.

If your institution has set up a minimum number of days between lessons, you may not be able to receive a lesson that has been sent in prematurely. Lessons cannot be received after the end date of the course unless an extension is granted. The system administrator determines the maximum number of extensions under Setup > Distance Education.

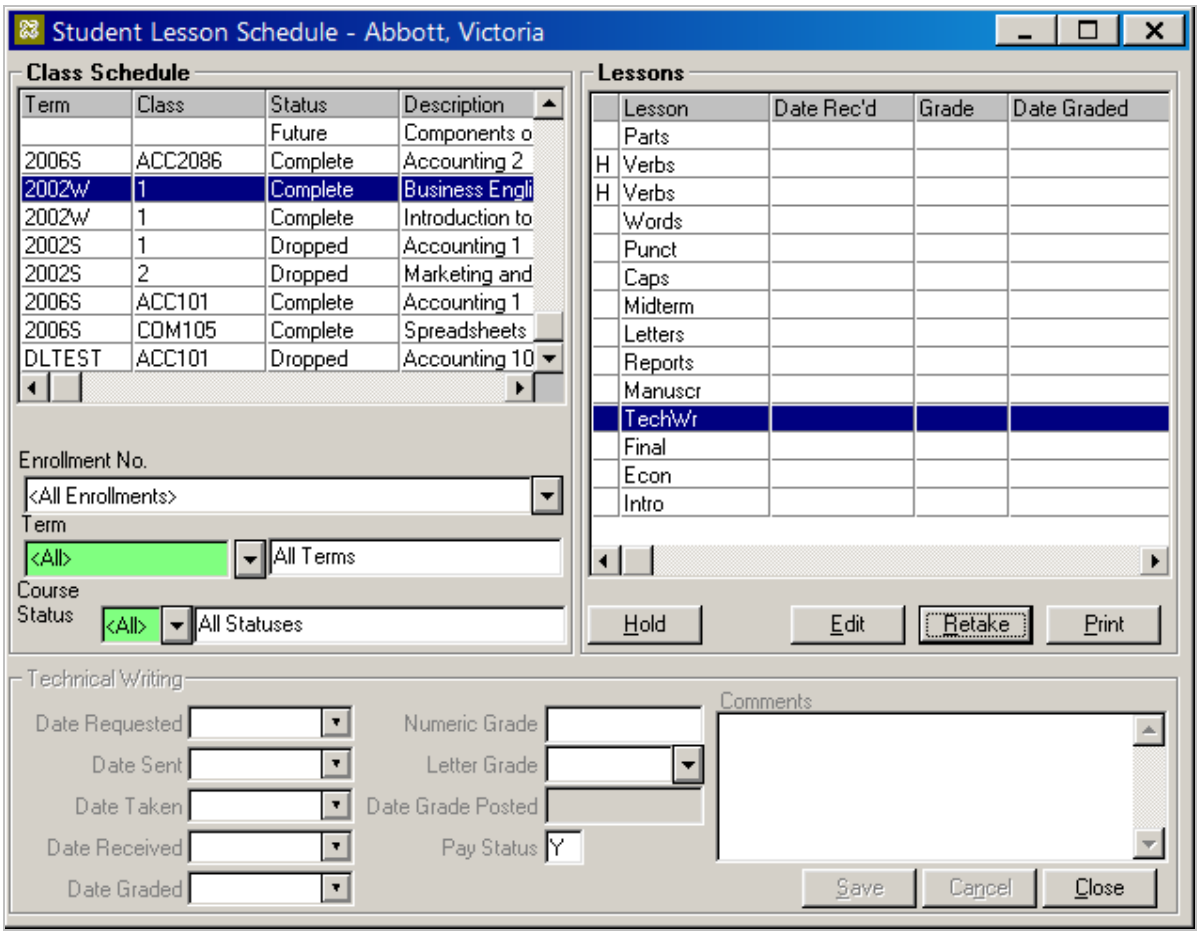
If the student has a ledger balance that is greater than zero, lessons cannot be received. You can, however, post grades for lessons that have been received.

A student group based on ledger balance can be set up to inhibit the posting of lesson grades.

Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

To view or update lesson data for a student:

1. Select a student.
2. Navigate to **View** > **Academic Records** > **Lessons**. The Student Lesson Schedule form is displayed. If necessary, filter the display by selecting the **Enrollment ID**, **Term**, and **Lesson Status**.



3. Select a row on the **Class Schedule** grid. This grid lists the student's class sections. The **Class** column shows the

combined Course Code and Section Code. The list of lessons for the selected class section is displayed.

4. Select a row on the **Lessons** grid. At the bottom of the form, any previously entered data for the selected lesson is displayed.
5. Click **Edit** to enter new data for the lesson.
6. In the **Date Requested** field enter the date when the student requested the lesson.
7. In the **Date Sent** field enter the date when the lesson is sent to the student.

   CampusNexus Student validates the Date Sent and Date Received. It does not allow the dates entered to be after the Expected End Date for the course. If you are an Administrator, you can continue by selecting "Yes" in the warning message. All other users have to enter dates on or before the end date of the course.
8. If the selected Lessons row is an exam, enter the **Date Taken**.
9. In the **Date Received** field enter the date when the lesson is returned to the institution by the student.
10. In the **Date Graded** field enter the date when the instructor returns the graded lesson.
11. Enter the **Numeric Grade**. When numeric grades are used, CampusNexus Student inserts the corresponding letter grade.

    Note: While posting grades for students, user cannot post the lesson grades for a student if the course is being taken as an audit.
12. If your institution uses only letter grades for lessons, select the **Letter Grade**. CampusNexus Student inserts the **Date Grade Posted**. This date indicates the date when the grade letter was recorded. This is the date used to produce daily grade reports.
13. Enter the **Pay Status** code. Enter Y for yes or N for no. CampusNexus Student changes the Pay Status to P for Paid when the instructor has been paid for grading the lesson.
14. Enter any comments in the **Comment** field. The field can hold up to 2000 characters.
15. When necessary, you can place lessons on hold. Select the lesson and click **Hold**. An H is displayed to the left of any lesson that is on hold and the hold date is added to the comments. The label on the Hold button changes to **Release**. When you release the lesson, the release date is added to the comments.
16. Click **Retake** if the student is retaking the lesson or exam.

    Fees for retaking lessons can be set up for the course under Lists > Student Accounts > Billing Methods and Programs. The billing method must be by course. The transaction code for the lesson retake is LESSONR. The code for exam retakes is EXAMR. These codes are added to the costs for a program version in Student Accounts.
17. If the student is granted an extension of time to complete the course, a charge may be levied on each lesson that is not yet received at the time of the extension. See Course Extensions for more detail.
18. Click **Save** to save any data changes you entered.
19. Click **Print** to print a Course Lesson Log for the student.

Final Grades

The Final Grades form lists all courses for the selected student. You can filter the courses by enrollment, degree level, term, or course status. For each course, the grid displays the term, course code, section, description, numeric grade and letter grade (if they have been entered), and other pertinent data about the students scheduled courses. The form also displays retake courses.

The Final Grades form allows you to include or exclude students that have dropped a course. The default setting is to include the drops. The Status column shows the student's status in the class (Scheduled, Current, LOA, etc.). When posting the grades, if the student status in class is Dropped, it cannot be changed here. The only way to reinstate (undrop) a course is through the Schedule form. The grade information from dropped courses is included when calculating the student's GPA.

You can also post final grades in batch mode from the Daily > Academic Records > Final Grades option. The form shown here is used when you want to enter or edit a grade for an individual student as opposed to groups of students such as class sections.

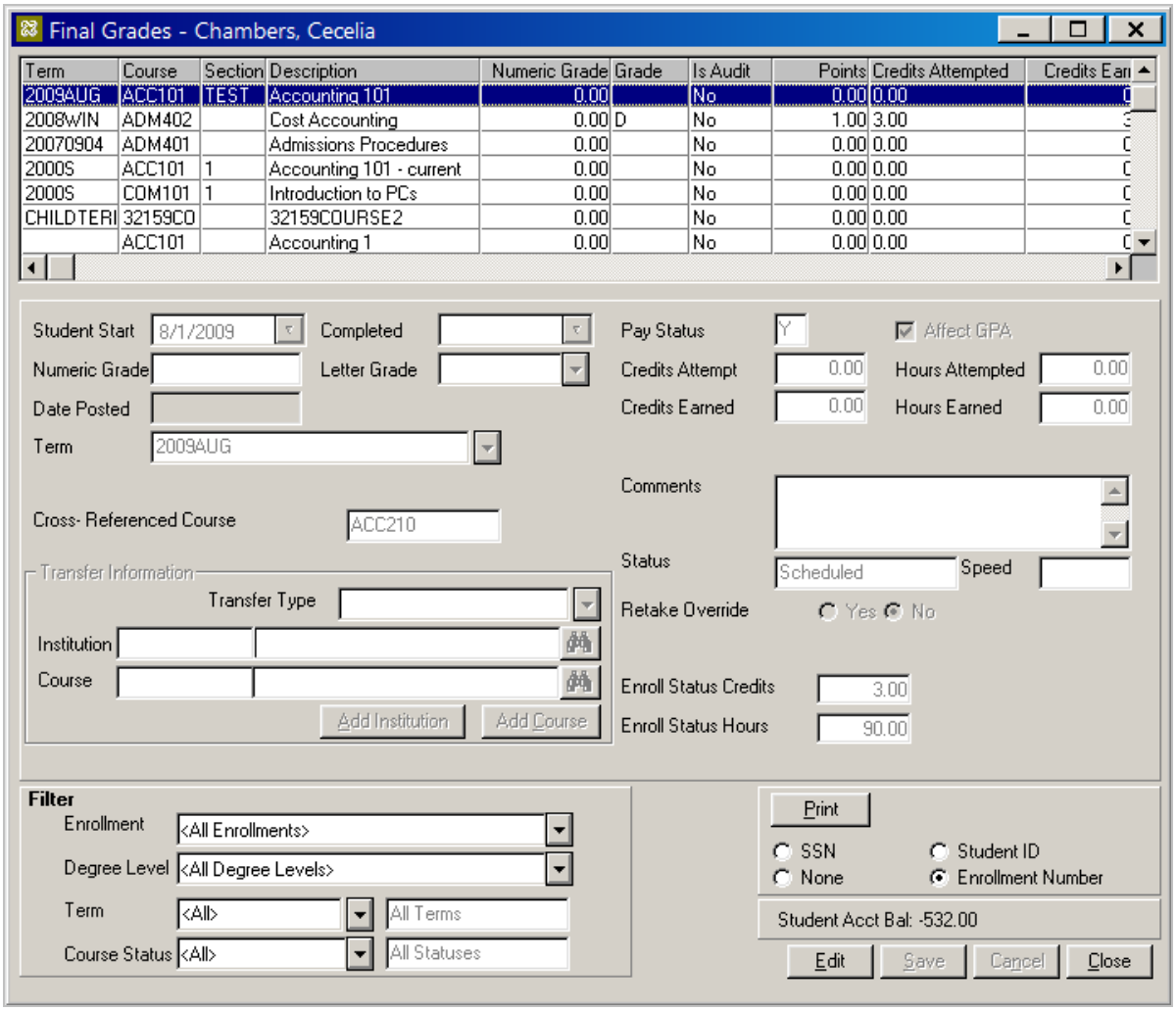
You can print a **Report Card** or a **Transcript** for the selected student. (Report Cards and Transcripts can also be printed from the Reports menu.) If the student has a Grade Delivery address on record, that address is printed on the Report Cards and Transcripts. The transcript may be **official** or **unofficial** depending on the user's selection. The transcript and report card include all dropped courses. Dropped courses are flagged with (**Dropped) on the report card.

If the student is on hold for transcript printing, CampusNexus Student does not allow the transcript to be printed. If you created a custom transcript and entered the file name under Setup > Academic Records, CampusNexus Student uses your report instead of the generic report.

Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

To enter or edit a final grade for a student's class section:

1. Select a student.
2. Navigate to **View** > **Academic Records** > **Final Grades**. The Final Grades form is displayed.



3. To filter the list of courses, select the **Enrollment**, **Degree Level**, **Term**, and **Status**.
4. Double-click a **Course** to edit the Final Grade. Enter the grade data, dates, and credit data. If a final grade is already on file, a message is displayed. You can override the message and post the new grade.

   Letter grades are converted to upper case during data entry so that the grades can be properly validated in the Letter Grade table.

   Numeric grades that are posted in fractions are rounded to two decimal places, for example. 87.25.

   Note: You cannot edit the **Numeric Grade** field for an audited course.
5. **Incomplete Grades**: The option to calculate and extend the expiration deadline date allows you to edit the expiration deadline date while posting an incomplete grade. Upon posting an incomplete grade, the expiration deadline date is calculated if the number of days to calculate the expiration date is configured on the Grade Scale, Course, or Campus Locations. The expiration deadline date cannot be edited if you do not have the staff level override permissions. If you have the override permissions, you can override the expiration deadline date within the maximum number of days configured for override on Campus Locations at the time of extending the deadline date.

   Note: The expiration deadline date can also be calculated or edited in a batch.
6. A manual replacement of an incomplete grade is also available so an instructor can change the incomplete grade to

the other grade if the student submits the course work on or before the "Expiration Deadline Date." Additionally, if the replacement grade is not configured on the grade scale, the incomplete grade is not automatically replaced by the replacement grade past the expiration deadline date if it has not been manually replaced to any non incomplete grades.

7. CampusNexus Student calculates the expiration deadline date based on the following hierarchy while posting an incomplete grade:

    a. Grade Scale configuration of Number of days past course section end date
    b. Course configuration of Number of days past course section end date
    c. Campus Locations configuration of Number of days past course section end date.

8. CampusNexus Student updates the **Date Completed** and **Date Posted**. By default the Date Completed on the student's Final Grades form is the End Date of the course. You can change the date when you post the final grade.

9. CampusNexus Student checks **Affect GPA** by default. If you do not want the grade to affect the student's GPA, clear the Affect GPA check box.

    Note 1: The **Affect GPA** option is disabled if the student selects an Audit course or to indicate that the grade will not be included in the student's GPA calculation, but the student will still have credits earned/attempted for the course, which will be included when evaluating SAP, as per the grade scale configuration.
    When the Clock to Credit option is ON for the enrolled program version, the Outside Coursework Hours and Total FA Hours fields are displayed. The user can enter in 5 minute increments as expressed in hour decimals (e.g., 10 minutes is 0.17 hours).

    Note 2:

    - When CEFP Configuration is ON, the Total Fa Hours = Outside Coursework Hours + Enroll Status Hours.
    - When CEFP Configuration is OFF, the Total Fa Hours = Outside Coursework Hours + Earned Hours when final grade was posted, otherwise Schedule Hours.

10. The **Pay Status** field indicates that the instructor should be paid (Y), should not be paid (N), or has been paid (P).

11. Enter any comments in the **Comment** field.

12. The student's status in the class selected is displayed in the **Status** field. It is read-only. When editing the grade, if the Student Status in Class is Dropped, you cannot change the status to Complete. The only way to reinstate (undrop) a course is through the Schedule form.

13. Click **Save**.

    Note: Upon saving Final Grades, CampusNexus Student evaluates if a prerequisite rule failed due to grade posting or credits/hours. If the campus is configured to do so, conditional courses are automatically unregistered if the pre-requisite rule fails. The reason for the automatic unregistration is populated as configured at the campus level.

14. To post a transfer grade for a selected course, select **T** in the Letter Grade field. The fields in the Transfer Information section are enabled.

    Note: The transfer grade must be flagged as such when setting it up under Grade Scale.

    a. Select the **Transfer Type** (College or High School).

    b. Click next to the **Institution** field. The corresponding search form (Search College or Search High School)is displayed. Enter the search criteria and click **Search**. Choose the institution from the search

results and click **Select**. The selected institution is placed in the Institution field.

c. Click next to the **Course** field. The course search form is displayed. Enter the search criteria and click **Search** . Choose the course from the search results and click **Select**. The selected course is placed in the Course field.

Note: The institutions and courses they offer are stored in the CampusNexus Student database. If a course needs to be transferred from a school that is not in the database, enter information directly into the **Institution** and **Course** fields, or click the Add Institution / Add Course buttons. The institution must be added first followed by the course. When you click **Add Institution** the Colleges form is displayed. When you click **Add Course** College Course form is displayed. For more information, see Setup - Admissions Lists [Colleges].

15. The **Enroll Status Credits** and **Enroll Status Hours** fields display the credits and hours that CampusNexus Student uses to calculate enrollment status for financial aid purposes.

    If you want CampusNexus Student to calculate an enrollment status for financial aid purposes that may be different than the actual academic credits or hours that a student has enrolled in (for instance, if a student is enrolled in a non-academic credit graduate level internship or remedial skills class required by an academic program), enter the number of credits or hours that CampusNexus Student should use to calculate an enrollment status.

16. When you are not editing a grade for a class section, click **Print** and select one of the options to preview and/or print the selected document. The options include:
    - Report Card
    - Transcript options (based on configuration - see below)
    - Academic History and Advisory Report options

    When transcript configuration of the campus is set to Enrollment Based, CampusNexus Student defaults to the current enrollment when printing a transcript. If the student is in a Hold Group, you cannot print transcripts unless you have authorization to override a transcript hold. See User Info Academic Records to set up these permissions. See also Academic Records Hold Codes Setup, Setup > Academic Records > Transcripts and custom transcripts for system administrator setup instructions for transcripts.

    - The transcript shows the Catalog Code for the course (if there is a value in the Catalog Code field). If there is no value in Catalog Code, the Code is printed.
    - If the student is enrolled in a program with a specific Transcript Description, the transcript displays the Transcript Description. Otherwise, the transcript displays the Version Description.
    - The generic Transcript report uses the Official School Name. If you are using a custom transcript report, change it to use the Official School Name instead of the Campus Description field. Transferred course work is included in the transcript. The GPA calculation includes transfer credits in the credits earned if the grade setup indicates to do so.

    When transcript configuration of the campus is set to **Student Based**, the Print menu provides **Transcript** as the only transcript-related option.

    When the transcript format is configured to **Both Enrollment Based** and **Student Based**, the Print menu provides the following transcript-related options:

    - **Enrollment Based Official Transcript**
    - **Enrollment Based Unofficial Transcript**
    - **Student Based Transcript** - with submenu options **All** and **Degree Level**. Degree Level is the degree level

associated with a student. For example, if a student has an enrollment with a program version tied to a degree that has been designated as an undergraduate degree, the menu option is 'Undergraduate.' There is one menu option for each distinct degree level associated with a student. If a student has two undergraduate enrollments and one graduate enrollment, the options are 'Undergraduate' and 'Graduate.'

Degree Progress Audit Form

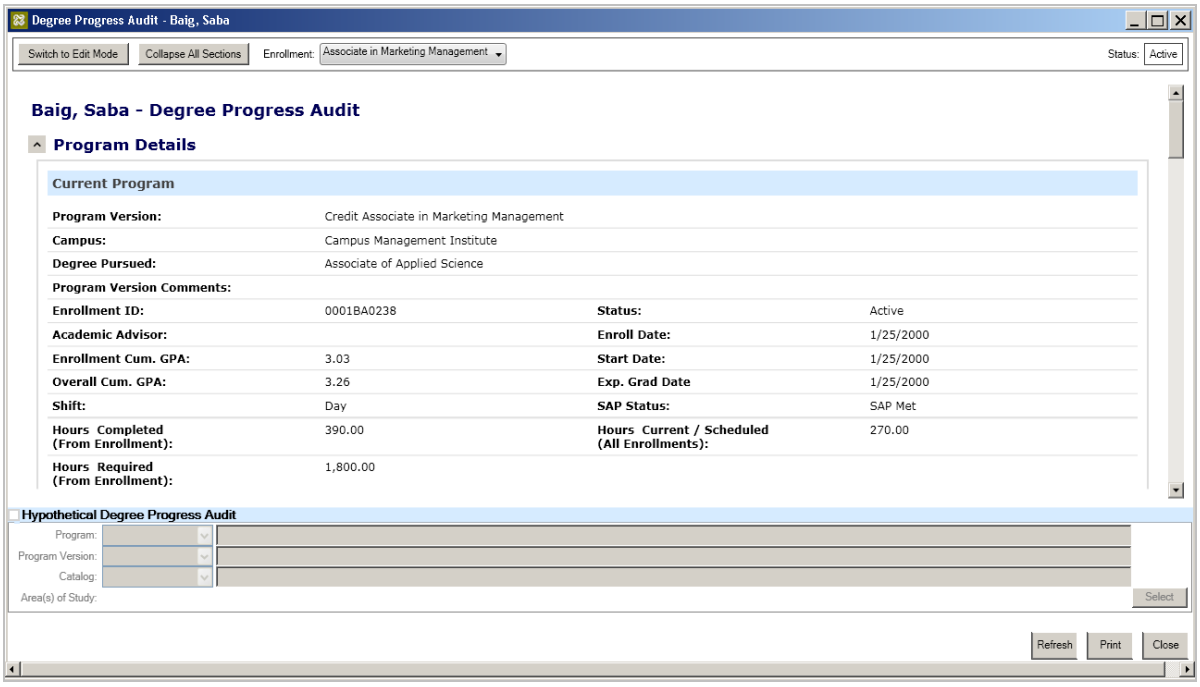
The Degree Progress Audit form is a multisection form showing a student's progress toward completion of degree requirements based on enrollment. A series of expandable/collapsible sections are provided to view and/or edit Program Details, Student Academic Progress, Course Categories, Required Courses, and Requirement Rules.

When the Degree Progress Audit form is first opened, CampusNexus Student defaults to the current enrollment. If the student has more than one enrollment, the enrollment can be selected from a drop-down list. The course categories required for the program version are displayed in the order they were set up for the program version. Within each category, courses are displayed in alphabetical order according to course code. For each course, the form displays the student's status for the course (Future, Scheduled, Current, Completed, or Dropped). Dropped courses always appear as Unfulfilled, as do failed courses and courses not meeting minimum GPA requirements. All courses are included, regardless of the enrollment record for which the course was taken or scheduled.

Program Details

The Program Details section shows information about the Current Program: Program Version, Campus, Degree Pursued, Program Version Comments, Enrollment ID, Status, Academic Advisor, Enroll Date, Enrollment Cum. GPA, Start Date (Expected Start Date if the student has not yet started), Overall Cum. GPA (configurable), Grad Date (Expected Grad Date if the student has not yet graduated), Shift, SAP Status, Credits Completed (From Enrollment), Credits Current/Scheduled (All Enrollments), and Credits Required (From Enrollment).

If the Program Version is set up as a clock hour program, CampusNexus Student displays hours instead of credits. Also, the Catalog Description and/or Areas of Study with AOS GPAs are displayed when applicable.



Credits Completed (From Enrollment) shows the total number of credits earned for the enrollment as seen on the Progress tab of the Enrollment folder, regardless of what has been applied to the Degree Progress Audit. This may be different than the credits completed in the Course Categories Summary section if the enrollment has courses associated that do not fulfill any program requirement, or courses from other enrollments that fulfill requirements of the current enrollment.

Credits Required (From Enrollment) shows the total number of credits required for the enrollment as seen on the Progress tab of the Enrollment folder. This may be different than the credits required in the Course Categories Summary section if there are waived or manually added courses on the Degree Progress Audit and the user has not elected to update the total credits required for the enrollment, or if the Total Required Credits has been changed from the Enrollment folder. Although this number

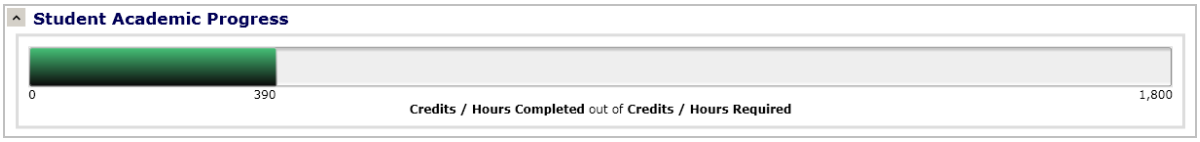
originates from the program version set up at the time of enrollment, based on the aforementioned reasons, or if the program version has been revised, this number could also differ from the required credits saved on the program version set up.

Credits Current/Scheduled (All Enrollments) will equal the Total of Credits for courses in a current or scheduled status within the Degree Progress Audit's required course lists.

Student Academic Progress

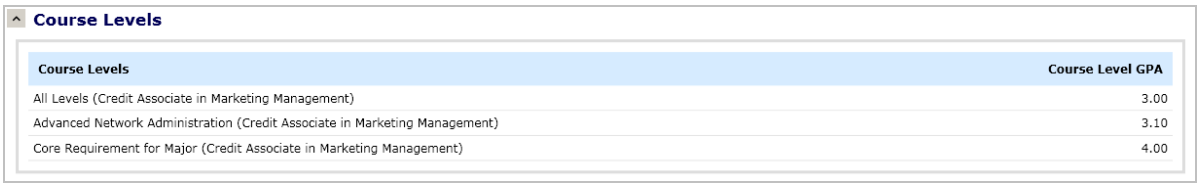
The Student Academic Progress bar provides a graphical representation of the student's progress towards completing their program requirements.

Note: The Credits/Hours represented in this graph are based on the values from the Enrollment folder.



Course Levels

The Course Levels section will only appear if the Degree Progress Audit is enabled with the Course Level GPA setting. It will list all Course Levels that apply to the student's taken required courses. For each course level, a corresponding GPA will be calculated and displayed. The method for calculating the Course Level GPA is derived from the program version setting (weighted vs. unweighted).



Course Categories/Areas of Study

The Course Categories/Areas of Study section lists all required Course Categories and Areas of Study (if defined) as configured in the Program Version Setup at the time of enrollment. Subsequent revisions to a program version's requirements will not impact the student's Degree Progress Audit, unless the Update Required Course Lists tool has been run. (See Program Revisions and the Degree Progress Audit). Course Categories might include, for example, General Education Requirements, Core Courses, Elective Courses, etc. For each category, a summary line will be shown indicating the name of the program or area of study the category Applies To, the Course Category name, Credits/Hours Required, (+)Credits/Hours Added, (-)Credits/Hours Waived, (-)Credits/Hours Completed,
(-)Credits/Hours Current/Scheduled, (=)Credits/Hours Remaining, and a calculated Course Category GPA.

The Credits (Hours) Required reflect the requirements defined for each category on the program version at the time of the student's enrollment. Subsequent revisions to a program version's category requirements will not impact the student's Degree Progress Audit, unless the Update Required Course List Tool has been run (See Program Revisions and the Degree Progress Audit). It is also important to note that the credits required will not be impacted by the addition of courses or waiving of courses, because they are meant to reflect the program's requirements, not what the individual students will take to meet the program's requirements.

Credits (Hours) Added is the sum of all credits (hours) for courses that have been manually added to the Degree Progress Audit.

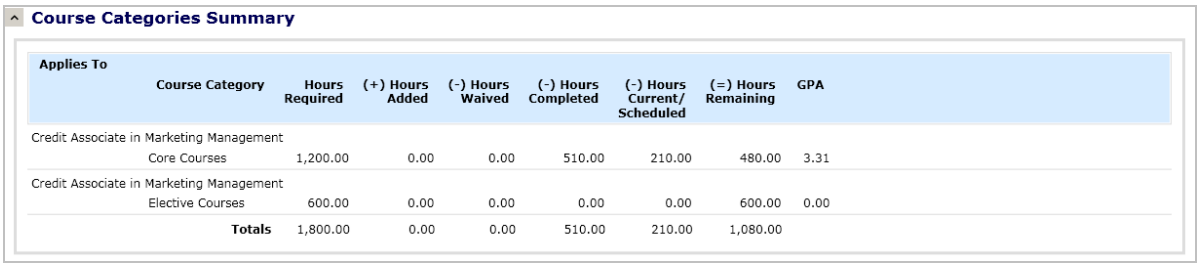
Credits (Hours) Waived is the sum of all credits (hours) for courses that have been manually waived on the Degree Progress Audit.

Credits (Hours) Completed is the sum total of credits (hours) earned on courses that fulfill the Degree Progress Audit's required courses.

Credits (Hours) Current/Scheduled is the total number of credits (hours) in a current or scheduled status for courses within the Degree Progress Audit's required course lists.

Credits (Hours) Remaining indicates the number of credits (hours) that the student still needs to schedule and complete to fulfill their program requirements. Its value is calculated as follows:

Credits (Hours) Remaining = Credits (Hours) Required **plus** Credits (Hours) Added **minus** Credits (Hours) Waived **minus** Credits (Hours) Completed **minus** Credits (Hours) Current/Scheduled.



Course Categories Summary

Applies To / Course Category	Hours Required	(+) Hours Added	(-) Hours Waived	(-) Hours Completed	(-) Hours Current/ Scheduled	(=) Hours Remaining	GPA
Credit Associate in Marketing Management							
Core Courses	1,200.00	0.00	0.00	510.00	210.00	480.00	3.31
Credit Associate in Marketing Management							
Elective Courses	600.00	0.00	0.00	0.00	0.00	600.00	0.00
Totals	1,800.00	0.00	0.00	510.00	210.00	1,080.00	

Course Category Course Lists

For each Course Category, a list of courses applicable to that category is displayed. The information displayed includes Course, Course Title, Course Level (only if configured to calculate Course Level GPA), Credits or Hours, Credits Earned or Hours Earned, Status, Grade, Term, Completion Date, and Min. GPA.

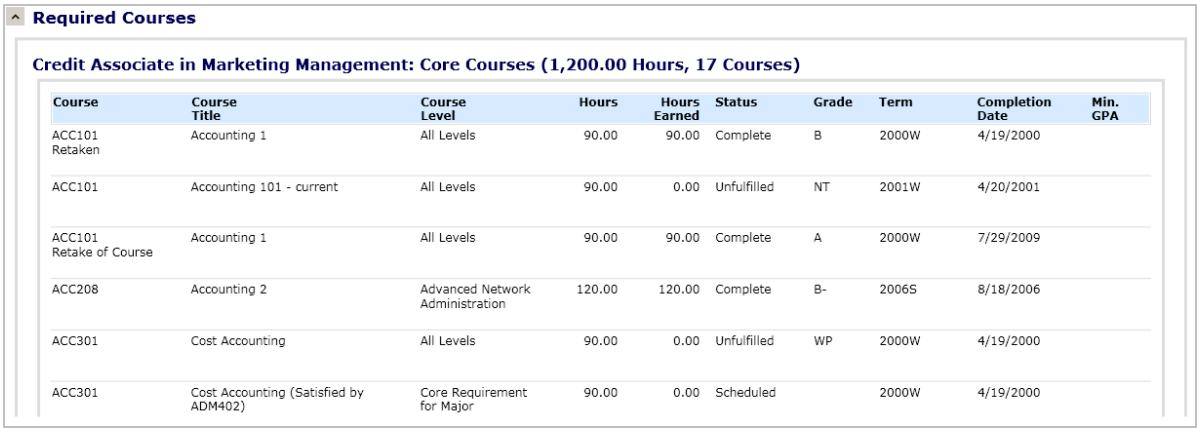
Courses that have been substituted, transferred, or audited are indicated in the Degree Progress Audit.

If a variable credit course is required as part of the program, all taken instances of the course will be applied to the course category until the credits required (specified on the program version course list configuration) are successfully earned.

The Course Category Header (Number of Credits and Number of Courses) is based on the program version at the time of the student's enrollment. These values do not change with the addition, waiving, or substitution of courses, so they may potentially be different than the calculated value based on actual courses required in the course list.

Credits (located at the bottom of every course category course) list are equal to the sum of the credits within the required course list that have not been waived. For courses that have been taken, this total will only include the credits from the required instance of the course.

Credits Earned (located at the bottom of every course category course) list are equal to the sum of the credits earned within the required course list.



Required Courses

Credit Associate in Marketing Management: Core Courses (1,200.00 Hours, 17 Courses)

Course	Course Title	Course Level	Hours	Hours Earned	Status	Grade	Term	Completion Date	Min. GPA
ACC101 Retaken	Accounting 1	All Levels	90.00	90.00	Complete	B	2000W	4/19/2000	
ACC101	Accounting 101 - current	All Levels	90.00	0.00	Unfulfilled	NT	2001W	4/20/2001	
ACC101 Retake of Course	Accounting 1	All Levels	90.00	90.00	Complete	A	2000W	7/29/2009	
ACC208	Accounting 2	Advanced Network Administration	120.00	120.00	Complete	B-	2006S	8/18/2006	
ACC301	Cost Accounting	All Levels	90.00	0.00	Unfulfilled	WP	2000W	4/19/2000	
ACC301	Cost Accounting (Satisfied by ADM402)	Core Requirement for Major	90.00	0.00	Scheduled		2000W	4/19/2000	

Note: Any transfer status code that is configured to display on the Degree Progress Audit (**Lists** > **Admissions** > **Transfer Status**), and the corresponding college information that is posted in the student's Transfer Credits folder, is displayed on the Degree Progress Audit in a separate row under the **Course/Course Title** headings, (including the Hypothetical DPA).

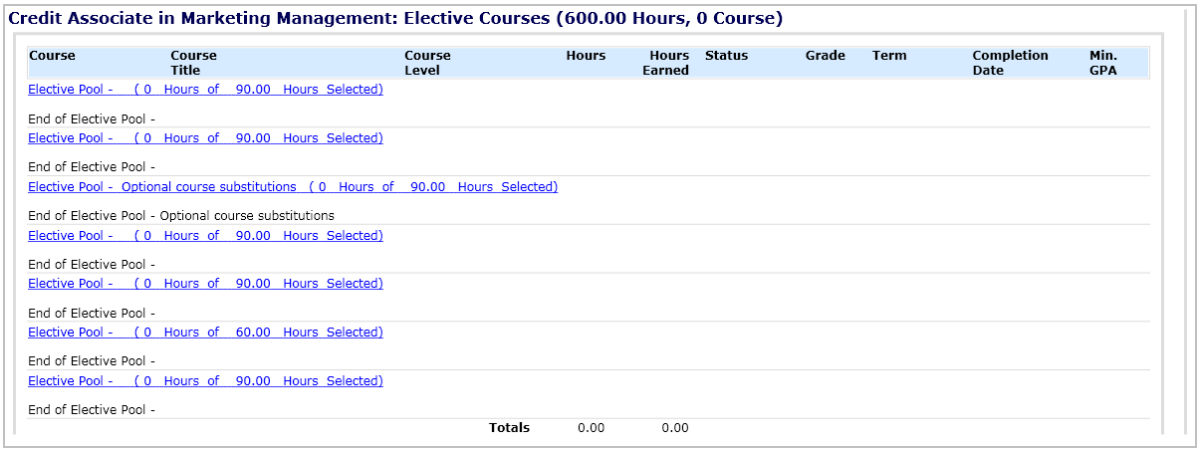
Course Category with Electives

When a category has a pool of elective courses that may be selected, an Elective Pool header is shown, listing the number of credits selected and the number of credits required from that elective pool. Each course that has been manually selected from a

specific elective pool is displayed, along with the Course, Course Title, Course Level, Credits or Hours, Credits Earned or Hours Earned, Status, Grade, Term, Completion Date, and Min. GPA. Taken courses from the Schedule folder that have not been manually applied to an Elective Pool, but could potentially satisfy the Elective Requirement, will be automatically matched to the Elective Pool.

Note regarding automatically applied courses vs. manually applied courses:

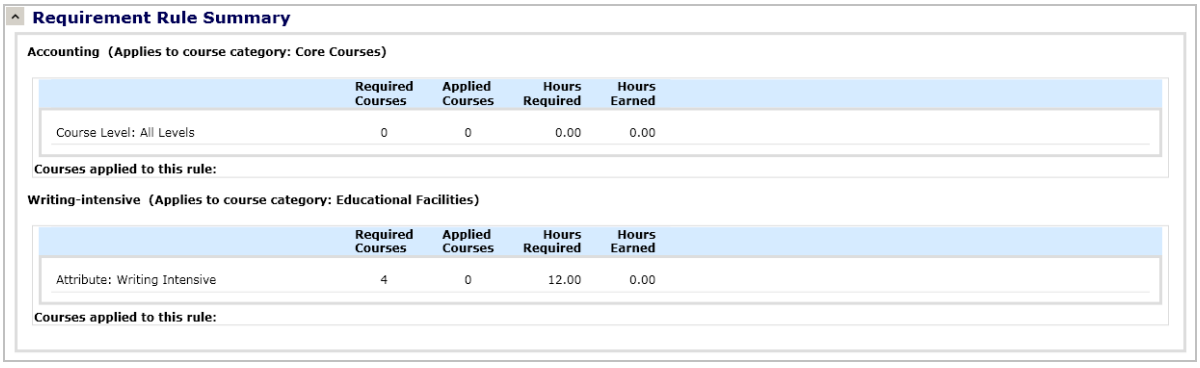
To distinguish between automatically applied courses and manually applied courses, check whether the course code becomes a hyperlink when viewed in Edit Mode. Automatically applied courses will not show a link to open the Fulfillment form. To enable a hyperlink, the course must be manually applied to the elective (thus confirming it is indeed an appropriate match for satisfying the elective requirement).



Requirement Rules

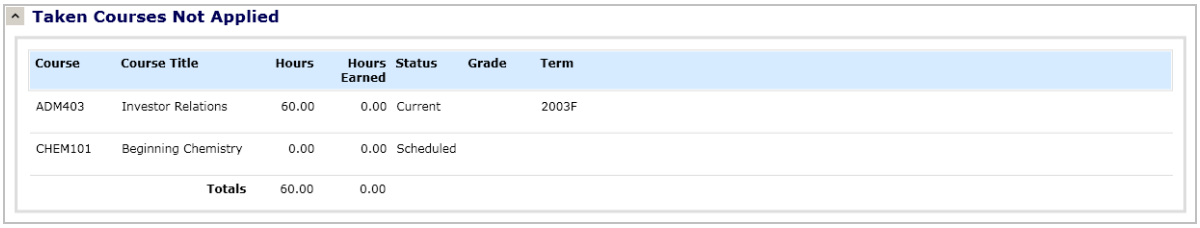
If a Program, Course Category, or Area of Study has Requirement Rules, they are displayed in the Requirement Rule Summary section.

The Degree Progress Audit displays the rule name associated with the program, course category, and/or Area of Study. Each rule shows its criteria in detail (course attributes with total credit or hours/course values required, and course levels with total credit or hours/course values), and how many courses/credits or hours have been taken to satisfy the conditions of the rule. The courses that were taken to satisfy the rule are also displayed. If there are more courses taken than are needed to satisfy a rule, the summary will display only the required amount of courses taken (chronologically, starting with the first course taken).



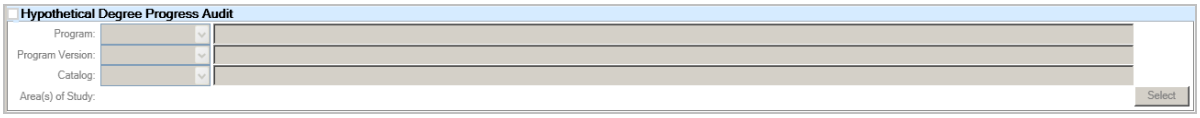
Taken Courses Not Applied

The Taken Courses Not Applied section displays all taken courses that have not been applied to the student's program. The information displayed includes Course, Course Title, Credits or Hours, Credits Earned or Hours Earned, Status, Grade, and Term. Transfer information that has been configured to display on the Degree Progress Audit is also included in this section.



Hypothetical Degree Progress Audit

An option at the bottom of the Degree Progress Audit form enables the user to perform a Hypothetical Degree Progress Audit. In the hypothetical scenario, the user selects a different Program, Program Version, Catalog (when applicable), and/or Area of Study (when applicable). The output is then generated by comparing the student's Enrollment Schedule records to the program course records for the program version selected. The result is a picture of how the student's work to date would fit in to the selected program version, including taken courses that could satisfy an elective pool.



Details for Additional GPAs

The system will display any new GPAs on the Degree Progress Audit (and Report Cards) if configured to do so. Each time a grade is posted, the system will automatically determine which new GPA should be recalculated with the newly graded course included. The system will automatically calculate and store the newly created GPAs for all applicable students. GPAs will be calculated using all final grades for all courses marked to be included in the GPA calculation. A stored GPA will be overwritten each time it is recalculated.

Course Order in the DPA

When courses are completed by a student, these courses may be available in multiple places in the Degree Progress Audit. When a course appears in more than one place (category, elective pool, etc..), the DPA priority order determines where the course is assigned first. After this, reassignment can be done through fulfillment logic (in the Fulfillment form).

The DPA priority order for course assignment is as follows:

1. Required Course list for the Program Version for Course Categories marked as Core.
2. Required Course list for the Program Version for Course Categories not marked as Core.
3. Elective Pools in Course Categories for the Program Version marked as Core.
4. Elective Pools in Course Categories for the Program Version not marked as Core.
5. Required Course list for an Area of Study with a Type of Major for Course Categories marked as Core.
6. Required Course list for an Area of Study with a Type of Major for Course Categories not marked as Core.
7. Required Course list for an Area of Study with a Type of Minor for Course Categories marked as Core.
8. Required Course list for an Area of Study with a Type of Minor for Course Categories not marked as Core.
9. Required Course list for an Area of Study with a Type of Concentration for Course Categories marked as Core.
10. Required Course list for an Area of Study with a Type of Concentration for Course Categories not marked as Core.
11. Required Course list for an Area of Study with any other Type besides Major, Minor or Concentration marked as Core.
12. Required Course list for an Area of Study with any other Type besides Major, Minor or Concentrator not marked as Core.
13. Elective Pools in Course Categories for an Area of Study with a Type of Major marked as Core.
14. Elective Pools in Course Categories for an Area of Study with a Type of Major not marked as Core.
15. Elective Pools in Course Categories for an Area of Study with a Type of Minor marked as Core.
16. Elective Pools in Course Categories for an Area of Study with a Type of Minor not marked as Core.
17. Elective Pools in Course Categories for an Area of Study with a Type of Concentration marked as Core.
18. Elective Pools in Course Categories for an Area of Study with a Type of Concentration not marked as Core.

19. Elective Pools in Course Categories for an Area of Study with any other Type besides Major, Minor or Concentration marked as Core.
20. Elective Pools in Course Categories for an Area of Study with any other Type besides Major, Minor or Concentration not marked as Core.

Degree Progress Audit Logic

The Degree Progress Audit (DPA) is a student/enrollment-centric process that tracks a student's progress toward completion of their degree requirements. The DPA assigns courses in a student's schedule to appropriate categories depending on a set of requirement rules that apply to the specific (or hypothetical) enrollment.

Completed courses in a student's schedule that fulfill a category course requirement are automatically assigned to that category if they are equivalent to the required course. Taken required courses, taken courses that are equivalent to a required course, and taken courses that exist in an elective pool are automatically matched to the requirement. Substitute courses, however, are not automatically matched. Taken courses that have not been applied to the requirements are displayed in the **Taken Courses Not Applied** section of the DPA form.

The Degree Progress Audit is student/enrollment-centric. When a student is enrolled, all requirements and Requirement Rules that exist on the Program Version at that moment are stored by enrollment for that student. The course requirements for the student will not change if modifications are subsequently made to the Program Version, Catalog Year, and/or Area of Study (AOS) Course Lists in which the student is enrolled. If a change is made to the Program Version requirements for the program the student is enrolled in, and the changes need to be applied to the student, the Update Required Course Lists tool should be used to rebuild the required course lists for all students to whom the change applies.

When changes are made to the student's Degree Progress Audit using Edit Mode, CampusNexus Student will automatically reflect these changes in the student's Schedule. If required courses are added, they will be placed in the student's Schedule with a status of Future. If courses are no longer required and are removed from the Degree Progress Audit, they will be removed from the Schedule folder as long as they have a status of Future. If the course has a status of Registered, Current, or Completed, it will remain in the Schedule folder.

Once changes have been made to the student's Degree Progress Audit, the student's enrollment requirements remain with the student and may (depending on the changes) be different than the original requirements of the student's Program Version, Catalog Year, and/or Area of Study.

Viewing a Degree Progress Audit

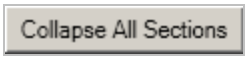
You can view the Degree Progress Audit for a student in any Program Version, Catalog Year, and/or Area of Study that has a rule (or rules) assigned to it. The Degree Progress Audit form always opens in View Mode; with appropriate permissions, you can switch to Edit Mode and make student-specific modifications.

To view a Degree Progress Audit:

1. Select a student.
2. Navigate to **View > Academic Records > Degree Progress Audit**.

   The Degree Progress Audit form for the current student is displayed in View Mode.

   Note: The Degree Progress Audit form can be expanded to full-screen view, making it easier to read.
3. If the student has more than one enrollment, select the appropriate **Enrollment** from the drop-down list.
4. Click the or button to collapse or expand the individual sections of the Degree Progress Audit form as needed.

   To collapse all sections at once, click the  button.

   When all sections are collapsed, the button change to so that all sections can be expanded in one step.

Note: If the Print option is selected, all sections of the form will be expanded before printing to ensure a complete view of the Degree Progress Audit.

Working with the Degree Progress Audit (Edit Mode)

When the Degree Progress Audit form is in Edit Mode, you can: enter a substitute course; transfer credits from another institution; add, waive, or fulfill course requirements; add or waive requirement rules; associate and/or unassociate courses to/from specific enrollments.

To work with the Degree Progress Audit:

1. Select the student whose Degree Progress Audit you would like to modify.
2. Navigate to **View** > **Academic Records** > **Degree Progress Audit**. The Degree Progress Audit form is displayed.
3. If the student has more than one enrollment, select the **Enrollment** from the drop-down list.
4. Click the **Switch to Edit Mode** button located at the top of the form. This enables the links that are associated with the course codes.

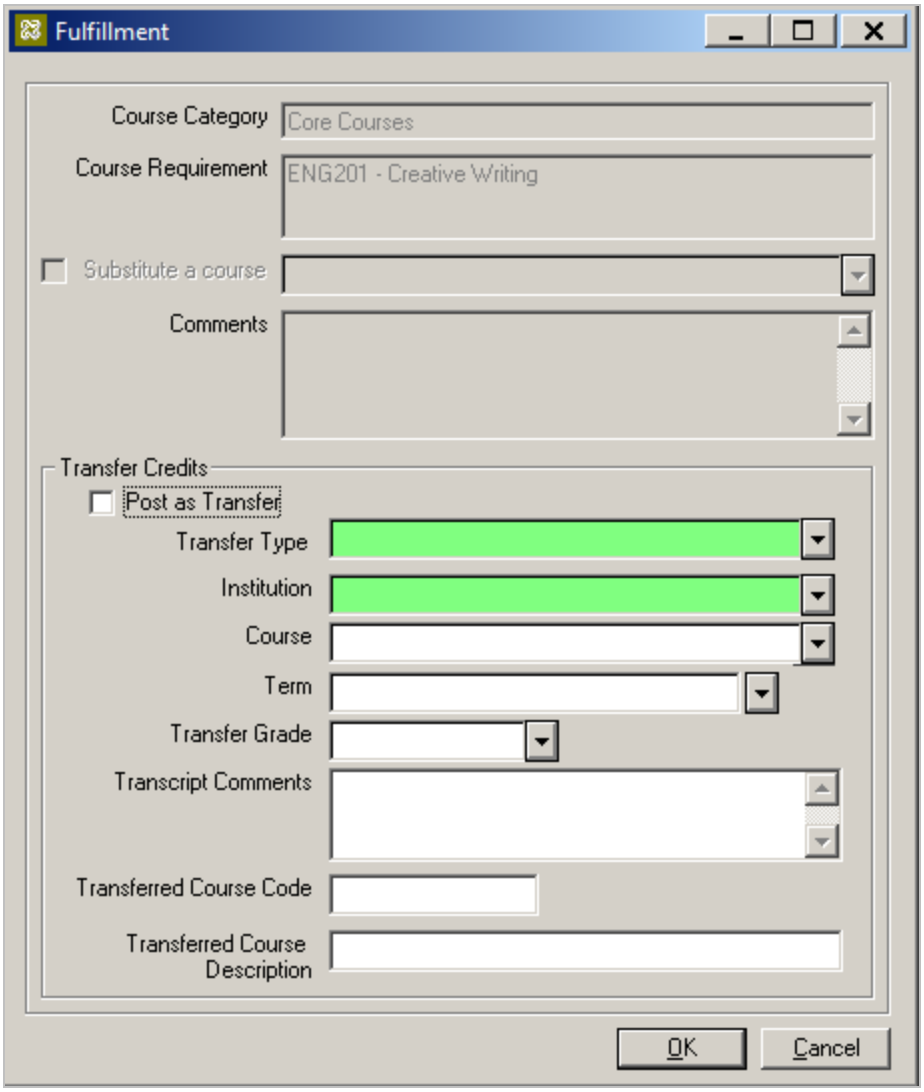
   The additional links displayed include:

   - Waive Requirement link or Undo Waive Requirement link at course level;
   - Add a course requirement link at the bottom of each Course Category section;
   - Associate link or Unassociate link at course level; associate or unassociate selected courses to/from specific enrollments from the Degree Progress Audit form;
   - Move to **Taken Course not Applied** link or **Undo Move to Taken Course not Applied** link. This allows the course to be moved from its current category to the Taken Courses not Applied section or back to its original configured category. This is used in non-term programs to alter student progression when 'Allow courses exempt from progression' is enabled. If the course was used to reduce program requirements already completed, such as a transfer credit course, this will trigger an adjustment of AY/LP sequences and their credits or hours and weeks.

   Note: Upon associating courses from the Degree Progress Audit form, the updated information is reflected on the Progress tab of the Enrollment form.

   - Fulfill Requirement link or Undo Fulfill Requirement at course level; allows the user to fulfill requirements from the Degree Progress Audit form, and to undo this action, if applicable. This functionality can be used to trigger a change in course progression when 'Allow courses exempt from progression' is enabled. A course that does not meet the minimum grade points configured in its original category, which would not progress the student, can fulfill a requirement in another category and allow the student to progress.
   - Elective Pool links in each Category, if applicable and if the program version allows elective courses;
   - Requirement Rules links are shown, if applicable, in the individual Course Categories containing the Elective Courses.
5. Depending on the requirements of the program version, different links are displayed with each course. If a course has **not yet been completed**, you may:

   - Perform a **Substitution** or post earned **Transfer Credit** on a Future or Scheduled course by clicking the **Course Code** on any row. The **Fulfillment** form is displayed.



- **To enter a substitute course:**

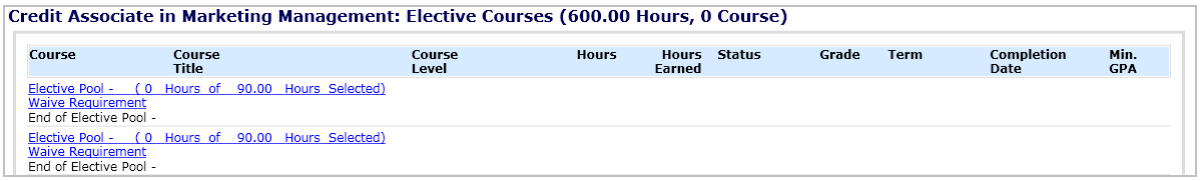
  Select the **Substitute a course** check box, and then select a course from the drop-down list. The selected course will be substituted for the course on the Degree Progress Audit.
  Note: This may only be done if substitutions are allowed for the course, as configured under Lists > Academic Records > Programs > Program Versions > Course List.

- **To transfer credits from another institution:**

  Select the **Post as Transfer** check box, then use the **Transfer Type** drop-down list to select the transfer type (College or High School). This will populate the **Institution** and **Course** drop-down lists accordingly. Select the **Institution** from which credits are being transferred, the **Course**, **Term**, and the **Transfer Grade**.If desired, you may enter **Transcript Comments**,**Transferred Course Code**, and a **Transferred Course Description**. The **Course** code entered would be the code indicated on the transcript of the institution from which the course was transferred. Select your school's term to which the transferred course applies. If necessary, enter **Transcript Comments** to explain the transferred grade. This comment will print on the transcript.

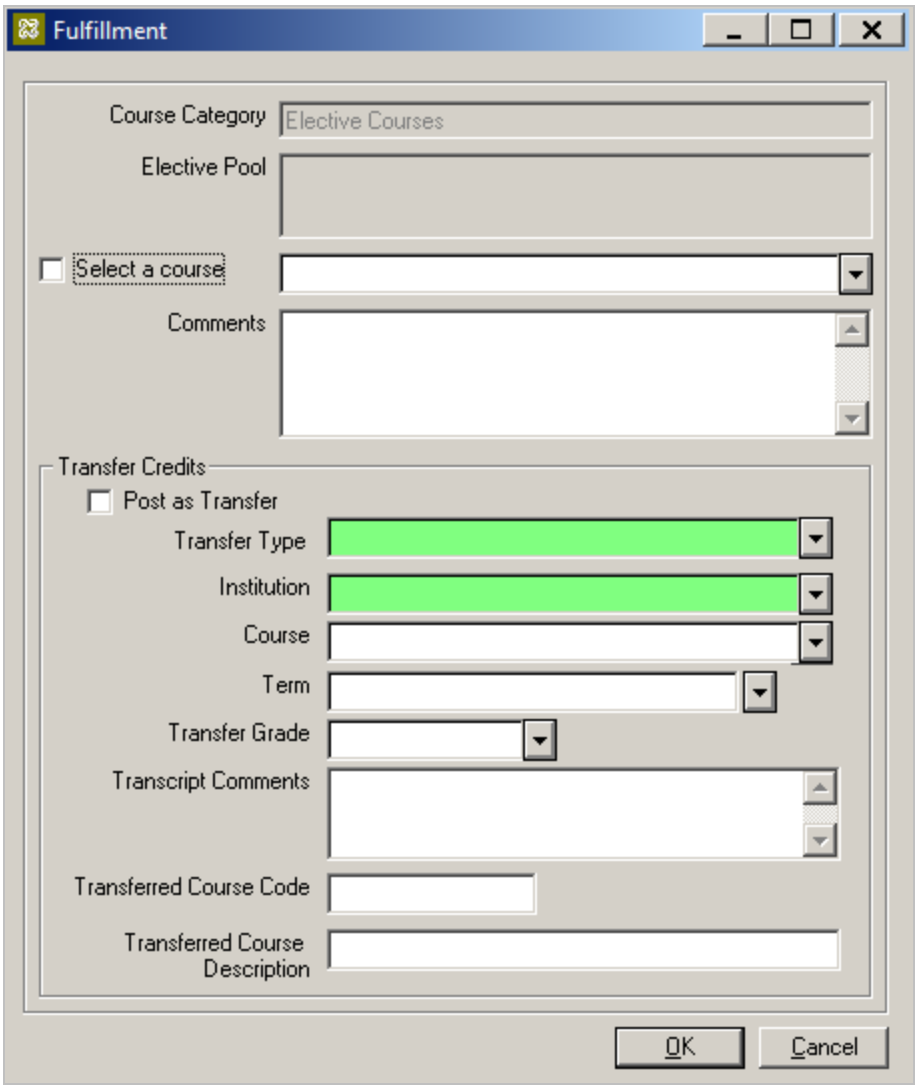
Note: The college name and courses associated with that college must have been previously entered. A list of colleges and their associated courses is normally controlled by entries made under Lists > Admissions > Colleges.

6. For **Elective Courses**, you will see a link entitled **Elective Pool - <elective name> (<number> Hours/Credits of <number> Hours/Credits Selected)**. The <elective name> comes from the Elective rule specified in the program version. CampusNexus Student displays how many relevant credits or hours the student has selected out of the total number of credits or hours required to fulfill the elective requirement.

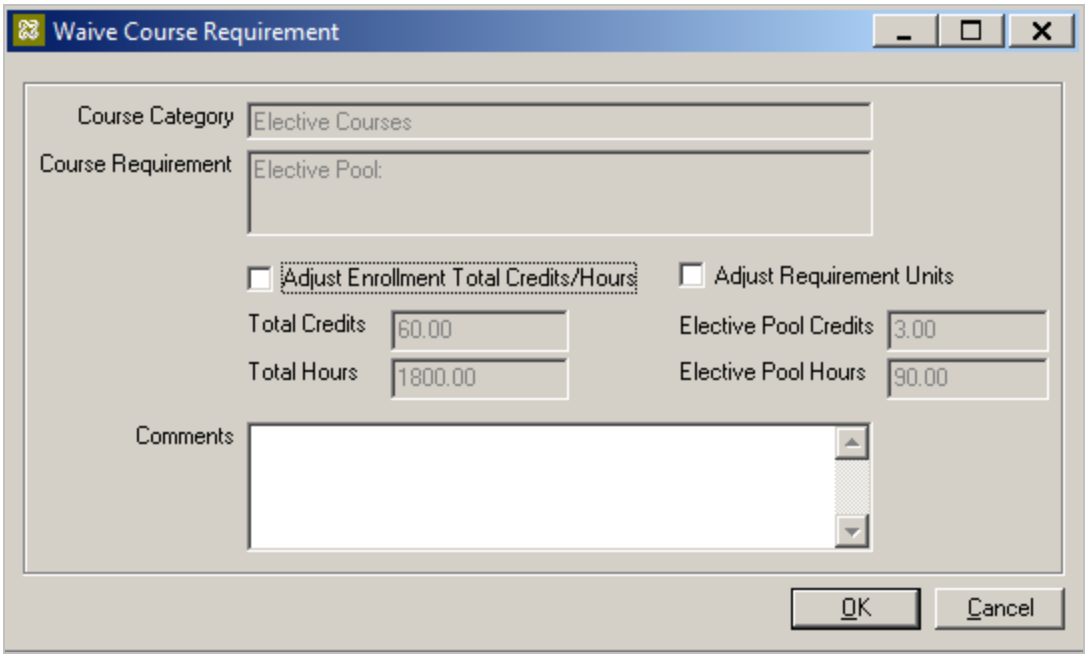


Clicking the **Elective Pool** link opens the **Fulfillment** form showing the following options:

Select a course check box and a drop-down list of courses in the elective pool. Choose a course from the list that fulfills the elective requirements. Add any relevant **Comments** in the box provided.



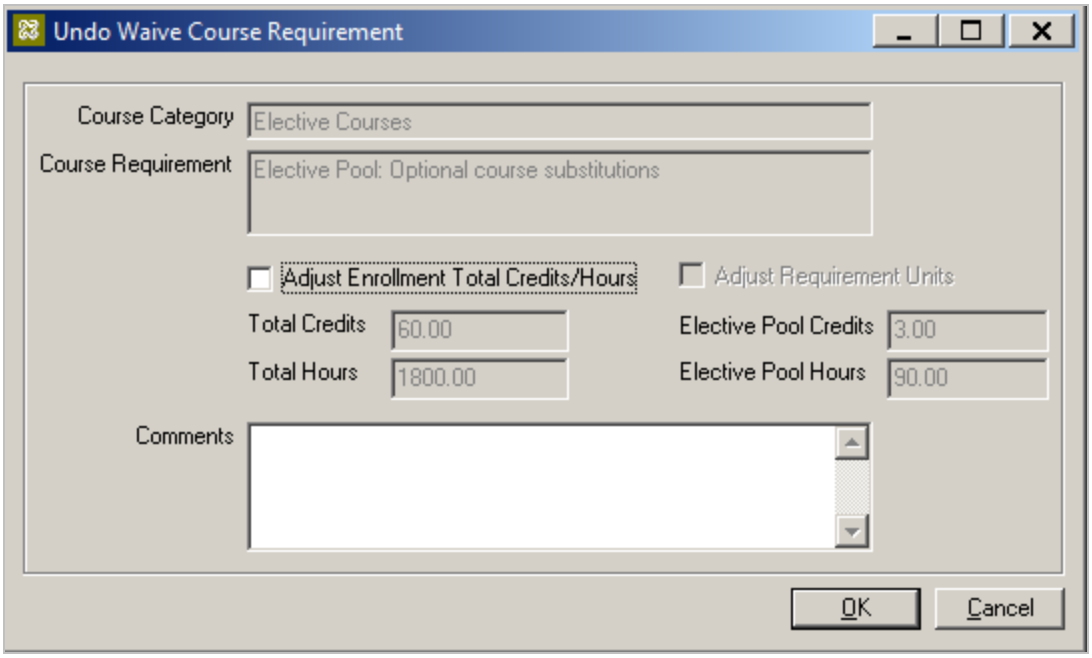
7. To waive a requirement, click the **Waive Requirement** link to open the Waive Course Requirement form.



If the adjustment to the student's program should change the Total Credits/Hours required for the enrollment as seen on the Progress tab of the Enrollment folder, select the **Adjust Enrollment Total Credits/Hours** check box.

Adjust Requirement Units check box: select this option to make available the **Elective Pool Credits** and **Elective Pool Hours** boxes. This allows you to adjust (add or subtract) required units for the elective pool. Add any relevant **Comments** in the box provided.

To undo the Waive Course Requirement action, click the **Undo Waive Requirement** link displayed for this course code to open the Undo Waive Course Requirement form.



If the adjustment to the student's program should change the Total Credits/Hours required for the enrollment as seen on the Progress tab of the Enrollment folder, select the **Adjust Enrollment Total Credits/Hours** check box.

Adjust Requirement Units check box: select this option to make available the **Elective Pool Credits** and **Elective Pool Hours** boxes. This allows you to adjust (add or subtract) required units for the elective pool. Add any relevant **Comments** in the box provided.

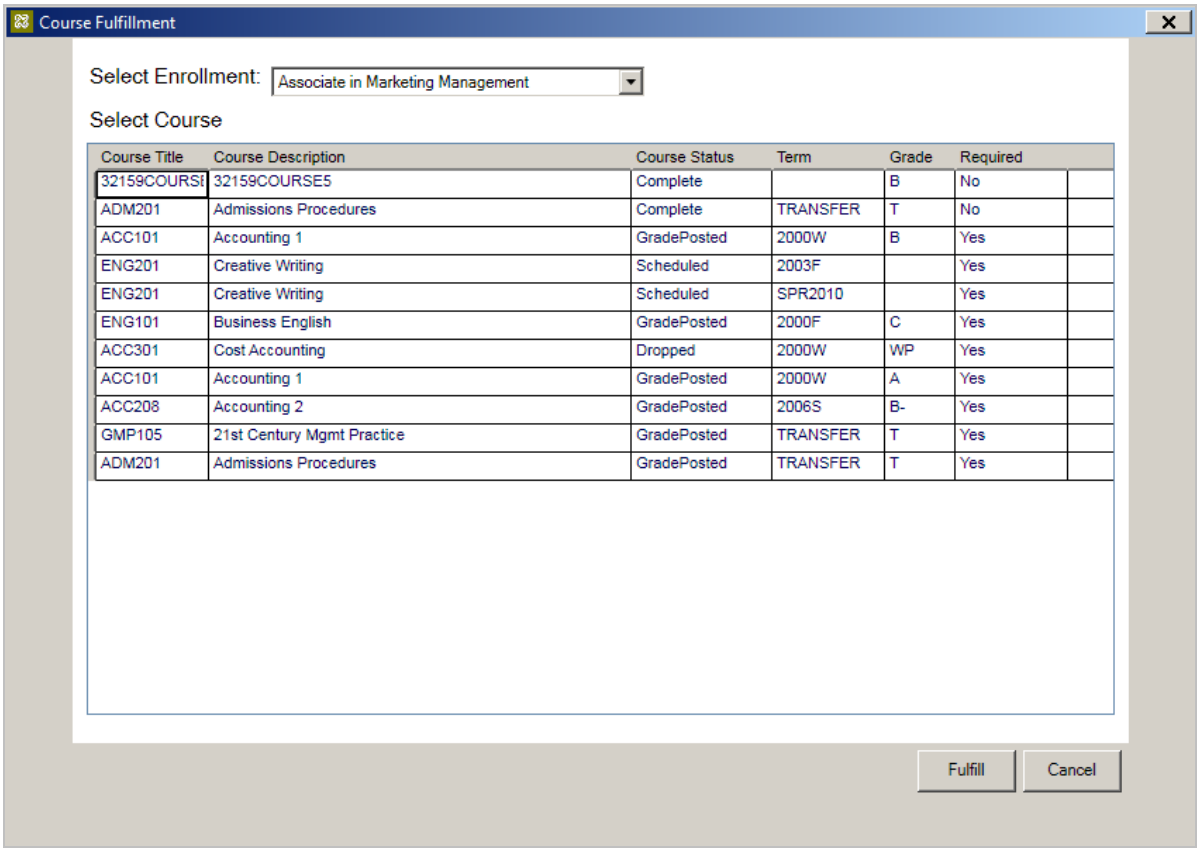
8. To fulfill a course requirement, click the **Fulfill Requirement** link to open the Course Fulfillment form.

   This form shows all taken courses from all enrollments and from the Taken Courses Not Applied section.

   Select Enrollment list: This list shows all enrollments from which course requirements can be fulfilled.

   Select Course grid: Courses with Required=Yes are the required courses for the selected enrollment. Course with Required=No are courses taken in different enrollments or from the Taken Courses Not Applied section.

   Select the Enrollment from the drop-down list and, from the Select Course grid, the course whose requirements are to be fulfilled. Click **Fulfill**. A message is displayed upon successful fulfillment of the selected course. Once the course is fulfilled, the Degree Progress Audit form will show the fulfilled requirement in parentheses, e.g., English 101 (Fulfilled by BUS101).



The Fulfill Requirement link enables users to move taken courses within the course categories or satisfy course requirements based on taken courses of other enrollments.

- If a student has taken a course outside of the program version, it is displayed in the Taken Courses Not Applied section. Previously, to count this course toward completing the requirements of the program version the student is enrolled in, the user would have had to waive a requirement for a course and then add a requirement for the course appearing in the Taken Courses Not Applied section. Now, the user can simply click the Fulfill Requirement link for a course that would otherwise have been waived to fulfill the requirement.

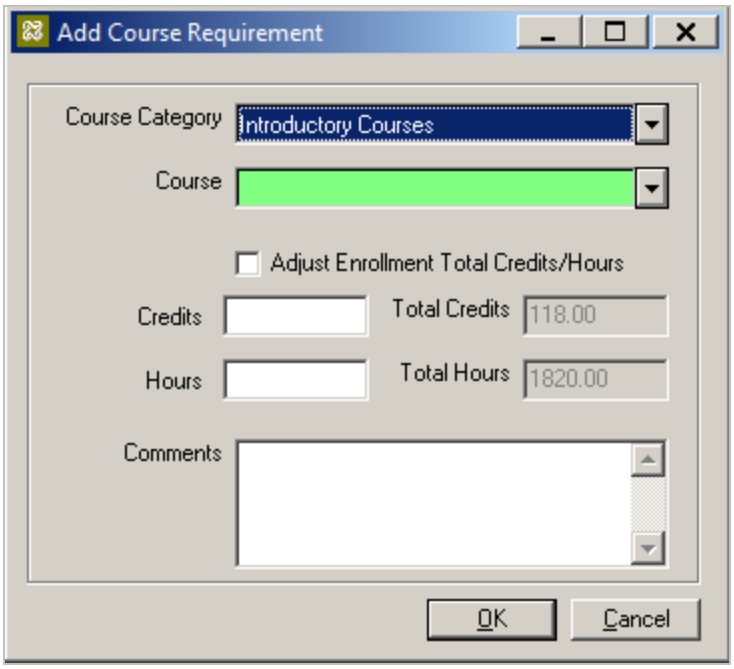
- If the campus configuration to Prevent Auto-matching is enabled, then the Degree Progress Audit will not auto-match any courses, and schools can use this Fulfill Requirement functionality.

Example: English 101 is core course in Enrollment 1. English 101 is a Core course as well as an Elective course in Enrollment 2. English 101 is taken in Enrollment 1. If Prevent Auto-matching is turned off, then the Elective course will be auto-matched. This may not be applicable in all schools; in those cases, users can fulfill English 101 as a Core course using the Fulfill Requirement functionality.

Note: As a recommended best practice, Anthology Inc. advises that if a student has two courses (e.g. Course A and Course C) that are both elective courses with substitution pools, even though using the **Fulfill Requirement** link with Course A to satisfy Course C is allowable, the best course of action is to simply Waive Course C. Using the Fulfill Requirement link in the scenario provided will cause a Course A duplicate in Future status to appear in the Degree Progress Audit form.

9. To add a course requirement, click the **Add a course requirement** link at the bottom of the Course Category section. The **Add Course Requirement** dialog box is displayed, allowing entry of the Course Category (already filled in by default) and the Course.

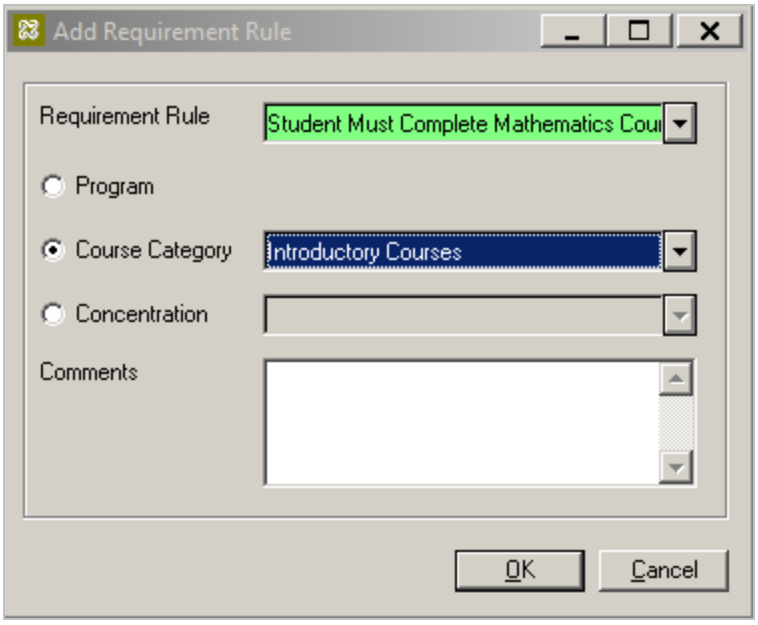
   Note: When the course is selected from the list, the Credits and Hours boxes are populated accordingly.



   If the adjustment to the student's program should change the Total Credits/Hours required for the enrollment as seen on the Progress tab of the Enrollment folder, click the **Adjust Enrollment Total Credits/Hours** check box. Comments may also be added.

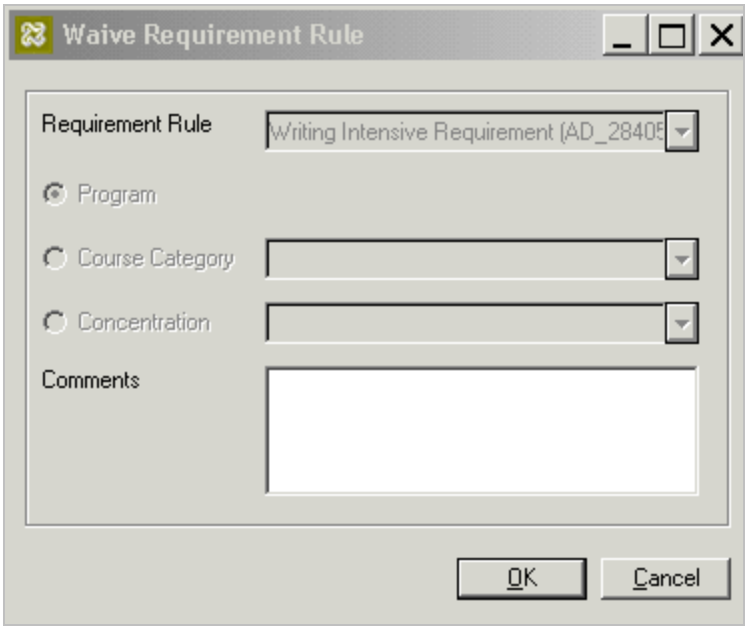
10. Adding/Waiving Requirement Rules - If there is at least one Requirement Rule configured in the database (**Lists** > **Academic Records** > **Requirement Rules**), users with applicable permissions can add and/or waive Requirement Rules, as well.

    To add a requirement rule, click the **Add a requirement rule** hyperlink. The Add Requirement Rule form allows you to select a requirement rule from a drop-down list. The requirement rule may be applied to a Program, Course Category, or Concentration.



Comments may also be added. Clicking the OK button will place the Requirement Rule into the student's Degree Progress Audit.

To waive a requirement rule, click the **Waive this requirement rule** link located near the title of the requirement. This opens the **Waive Requirement Rule** dialog box showing the rule to be waived and allowing for a comment as to why the rule is being waived.



11. **Undo** actions - Users with Delete rights to the Degree Progress Audit can undo manually added, manually waived, or manually fulfilled requirements.

Note: When changes are made to the student's Degree Progress Audit using Edit Mode, CampusNexus Student changes the student's schedule as needed. If required courses are added, they will be placed in the student's schedule with a status of Future. If courses are no longer required and are removed from the Degree Progress Audit, they will be removed from the Schedule folder

as long as they have a status of Future. If the course has a status of Registered, Current, or Completed, it will remain in the Schedule folder.

Performing a Hypothetical Degree Progress Audit

Using the Hypothetical Degree Progress Audit option, you can select a different Program, Program Version, Catalog, and/or Area of Study and generate output that shows what would be required for completion of the selected program.

To work with the Hypothetical Degree Progress Audit:

1. Select the student for whom the Degree Progress Audit is required.
2. Navigate to **View > Academic Records > Degree Progress Audit.** The Degree Progress Audit form is displayed.
3. Select the **Hypothetical Degree Progress Audit** check box.
4. Select the **Program** and **Program Version** from the drop-down lists. If applicable, **Catalog** and **Area(s) of Study** may also be selected.
5. Click **Refresh**.

   The data on the form will change to overlay the student's work-to-date on the selected program version and show what would be required for completion of the selected program. Values for Credits Required and Total Number of Courses are based on the Hypothetical Program Version selected. Values for Credits Completed (From Enrollment), and Credits Current/Scheduled (All Enrollments), are based on credits that apply to the hypothetical program based upon the hypothetical required course list.

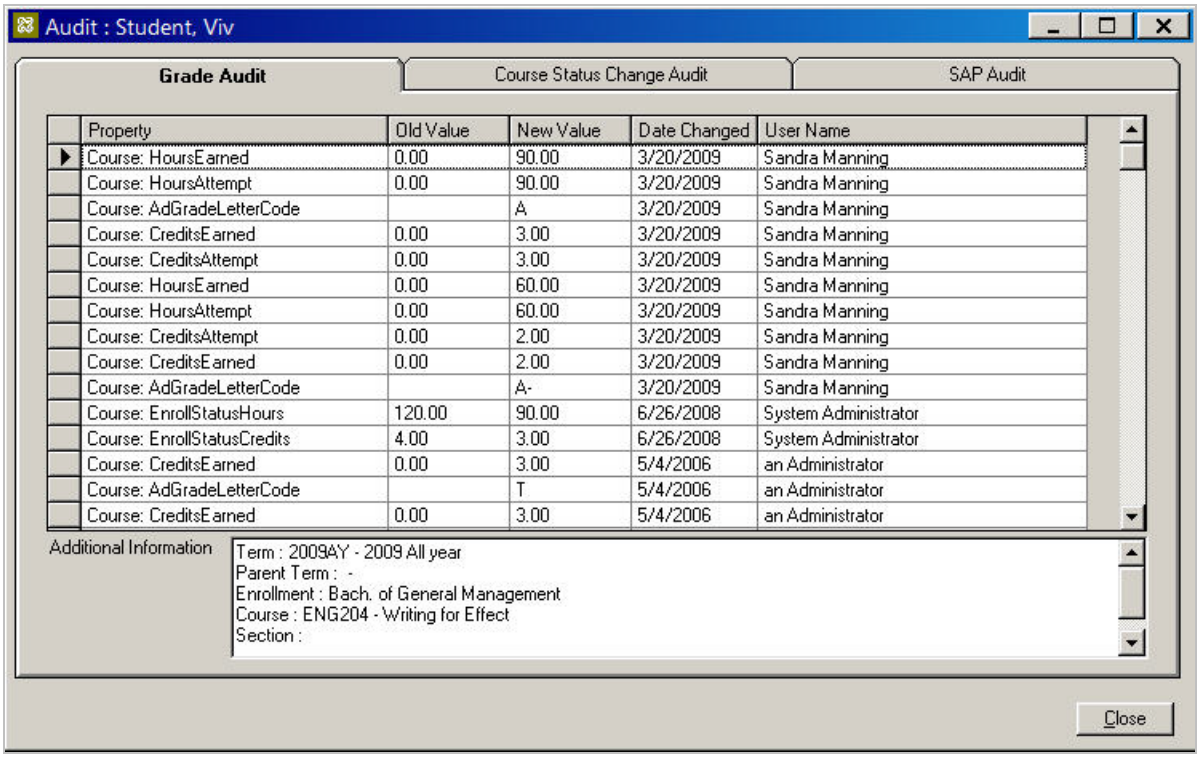
   CampusNexus Student evaluates the student's course list and automatically applies courses the student already has on the schedule (including equivalent and potential elective courses) that will fulfill requirements of the hypothetical program.
6. Click **Print** to print a copy of the data on the form. The required course list is sorted by Course Category.
7. Click **Close** to close the form.

Grade Audit

You can view audit entries for Grades, Course Status Change, and Satisfactory Academic Progress (SAP) for a student.

To view audit entries for academic records:

1. Navigate to **View > Academic Records > Audit**. The student's Audit form displays the Grade Audit tab.



The Grade Audit process displays changes to posted grade information for lessons and final grades and identifies what was changed, when it was changed, and who made the change. The Grade Changes Audit report provides the same information in printable format.

Field Descriptions: Grade Audit Tab

Field	Description
Property	This field identifies which property was changed. Properties monitored include: student course start date, course completion date, numeric grade, letter grade, term, credits earned, credits attempted, hours earned, hours attempted, affect GPA?, retake override, speed, comments, and pay status.
Old Value	The former value of the property.
New Value	The current value of the property.
Date Changed	The date when the change occurred.
User Name	The name of the user who changed the property.

Field	Description
Enrollment Description	The description of the enrollment assigned to the lesson grade record when the change occurred.
Additional Information	Information about the student's enrollment and course. **Note**: If the Grade Scale Update Tool is used to update a grade, the Additional Information field includes a notation that the grade was updated by the tool.

2. Select the **Course Status Change Audit** tab.

   The Course Status Change Audit process gathers and displays the courses for which the student has enrolled and the information pertaining to changes in the course status such as previous status, new status, date on which the status was changed, reason for status change, and user who changed the status. Where courses are automatically dropped based on attendance posting, SAP updating or School Status Change, pre-specified reasons are kept and added to the audit folder. These reasons are displayed here, as well as the Course Drops reports where applicable. See the Drop, Unregister, or Delete a student's Course section.

   Before the 8th day of class, CampusNexus Student add/drop logic allows the user to unregister the course. The course status changes back to "Future" and there will be no record of the student having registered in the first place. When a user is forced to drop a student's course after the Add/Drop period, the course is marked as a Drop and a drop grade is assigned, however, there is still no reason code given.

   When auto-drop logic removes a student from a class during attendance posting, the reason assigned to the drop will be "Dropped due to Attendance". This change applies to attendance taken from the student's attendance folder, from the daily option to post attendance, or from the daily option to post attendance dates.

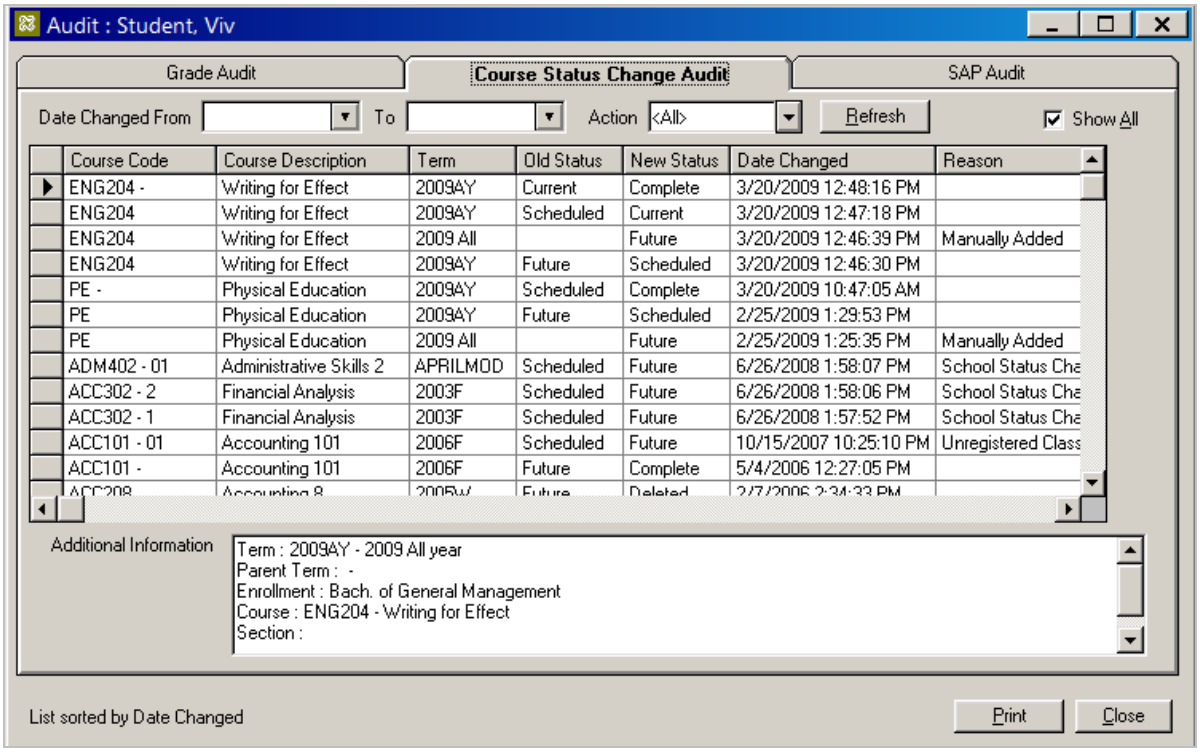
   When a Student's School status changes due to SAP failure, and that status change removes a student from a course, the reason assigned to the course drop will be "Failed SAP."

   When a Student's status changes due to Leave of Absence (LOA), Drop, or Standard Period for Non-Enrollment (SPN), the CampusNexus Student records the change automatically as "School Status change" in their audit folder.

   You can view the history of a student's course status changes when editing a course on a student's schedule. Click **Course Status History** to access the audit folder for the selected course history. See Class Schedule for additional information.

   When registering for a course, (through the Online Registration application) in a program version that contains an elective pool, the course is added to the student's schedule and recorded in the Course Status Change Audit folder.

   A student may be enrolled in a term/program version that allows the student to register outside the student's current program. This is configured through Daily > Academic Records > Online Registration Configuration > Program Version Configuration. The program version is checked to allow outside registration. The student will see a list of all courses available for the term. If the student registers for a course that is included in the student's present schedule or not, an audit entry will be made to the Course Status Change audit folder.



3. Use the **Date Changed From** and the **Date Changed To** filters to sort the grid by date range.
4. Use the **Action** filter to sort by action type.
5. Click **Refresh** to clear the filters.
6. Clear the **Show All** option as needed.
7. Click on the column headers to sort on each column in the grid. The bottom of the form indicates the sort method selected.

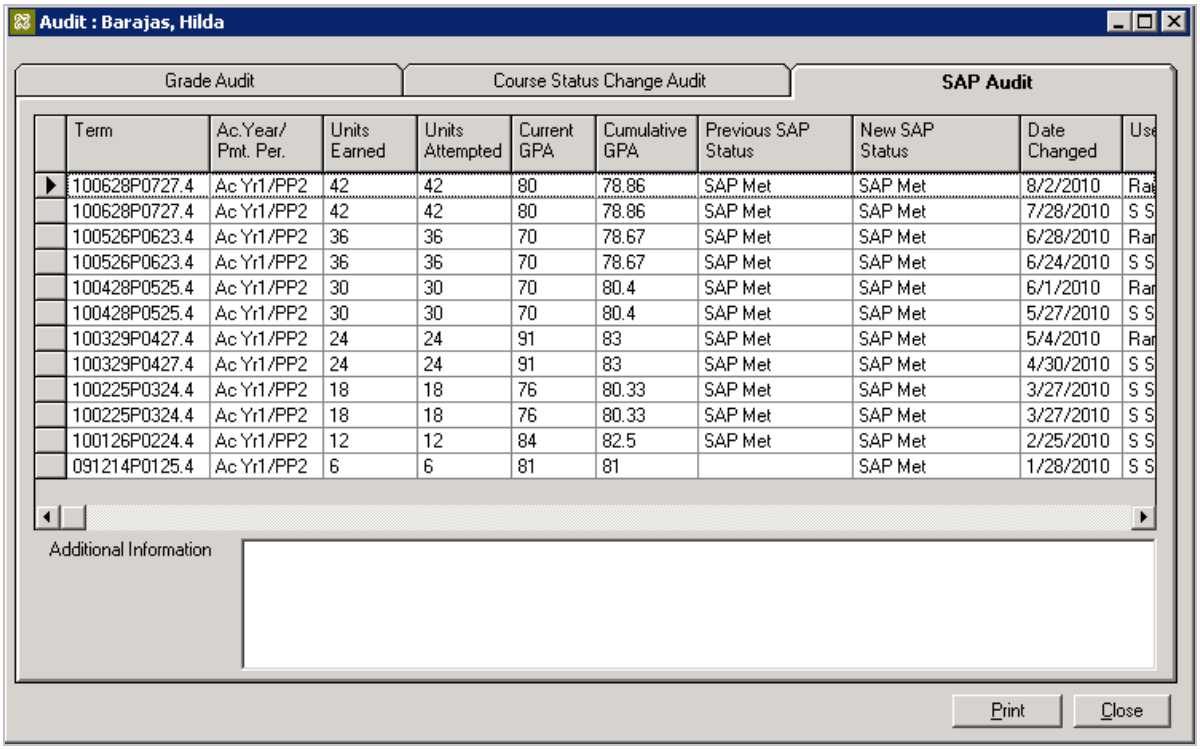
Field Descriptions: Course Status Change Audit Tab

Field	Description
Course Code	Code identifying the course for which the student has enrolled.
Course Description	Description of the course.
Term	Term in which the course is offered.
Old Status	Status of the course before the user changed it.
New Status	New course status set by the user.
Date Changed	Date on which the user changed the course status and includes a time stamp.

Field	Description
Reason	Reason for the course status change. See Course Reason for additional information. Possible values : • *Dropped* • *Unregistered* • *Deleted* • *Online Course Unregistration* if the student had unregistered the course using the "Register/Drop" feature on Portal • *Attendance Auto Drop Rule* if the student failed to meet the attendance requirements for the course.
User Name	Name of the user who changed the course status.
Credits	Credits achieved in the course.
Action	Action taken such as course registered, dropped via Portal, course cancelled, etc.
LDA	Last date the student attended classes.

8. Click the **SAP Audit** tab to view or print the student's SAP Audit information.

Note: The images below are for illustration purposes only. When viewing audit data for a SAP audit based on payment periods, for example, the term-related columns (Term and Term Sequence) may not be populated.



Term	Ac.Year/ Pmt. Per.	Units Earned	Units Attempted	Current GPA	Cumulative GPA	Previous SAP Status	New SAP Status	Date Changed	Use
100628P0727.4	Ac Yr1/PP2	42	42	80	78.86	SAP Met	SAP Met	8/2/2010	Ra
100628P0727.4	Ac Yr1/PP2	42	42	80	78.86	SAP Met	SAP Met	7/28/2010	S S
100526P0623.4	Ac Yr1/PP2	36	36	70	78.67	SAP Met	SAP Met	6/28/2010	Ra
100526P0623.4	Ac Yr1/PP2	36	36	70	78.67	SAP Met	SAP Met	6/24/2010	S S
100428P0525.4	Ac Yr1/PP2	30	30	70	80.4	SAP Met	SAP Met	6/1/2010	Ra
100428P0525.4	Ac Yr1/PP2	30	30	70	80.4	SAP Met	SAP Met	5/27/2010	S S
100329P0427.4	Ac Yr1/PP2	24	24	91	83	SAP Met	SAP Met	5/4/2010	Ra
100329P0427.4	Ac Yr1/PP2	24	24	91	83	SAP Met	SAP Met	4/30/2010	S S
100225P0324.4	Ac Yr1/PP2	18	18	76	80.33	SAP Met	SAP Met	3/27/2010	S S
100225P0324.4	Ac Yr1/PP2	18	18	76	80.33	SAP Met	SAP Met	3/27/2010	S S
100126P0224.4	Ac Yr1/PP2	12	12	84	82.5	SAP Met	SAP Met	2/25/2010	S S
091214P0125.4	Ac Yr1/PP2	6	6	81	81		SAP Met	1/28/2010	S S

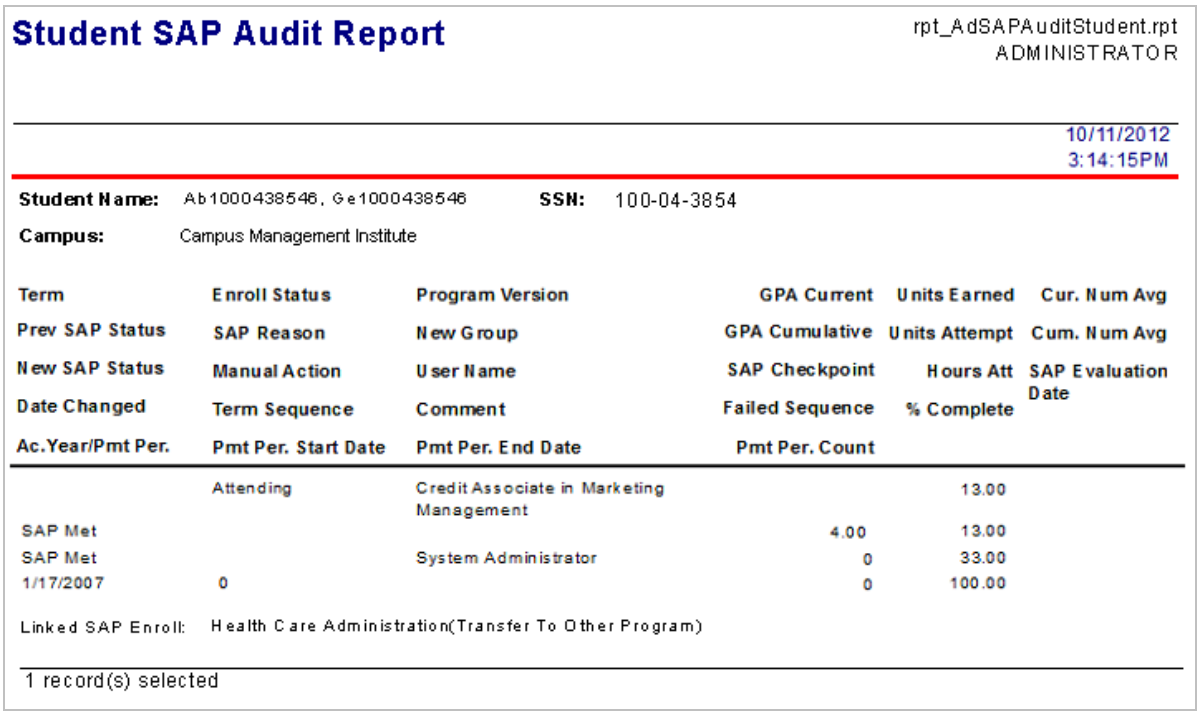
Field Descriptions: SAP Audit Tab

Field	Description
Term	Term in which SAP is evaluated.
Ac. Year/Pmt. Per.	Academic year/payment period for students evaluated based on a completed payment period. **Note**: When viewing audit data for a SAP audit based on payment periods, the term-related columns (Term and Term Sequence) are not populated.
Units Earned	Student's units earned for this term or payment period.
Units Attempted	Student's units attempted for this term or payment period.
Current GPA	Student's GPA for the term.
Cumulative GPA	Student's GPA from the time the student entered school.
Previous SAP Status	If SAP has not yet been run for a student, the column is blank. If SAP has been previously run for a student, the Previous SAP Status column contains the status from that prior run of SAP.
New SAP Status	Always contains the SAP status saved to the Term Summary.
Additional Information	When the SAP status calculated by CampusNexus Student is manually changed by the user, the system calculated SAP status and the SAP status selected by the user appear in the Additional Information section of the audit record for the SAP calculation. In addition, all SAP failed reasons from the SAP calculation appear in the Additional Information field.
Date Changed	Date on which system or user changed the SAP information.
User Name	Name of the user who changed the SAP information.
Checkpoint	Benchmarks established by the campus SAP policy.
Hours Attended	Student's hours attended for the period being evaluated.
Percent completed	Student's percentage of credits completed to the credits attempted for the period being evaluated.
Term Sequence	Term sequence number associated with the student's SAP evaluation.
Failed SAP Sequence	Sequence number in the SAP Policy where the student is failing SAP. The SAP failure reasons appear in the Additional Information field for each listing where the student did not meet SAP.
Linked SAP Enrollment	Program version description of the linked SAP enrollment.
Pmt Per. Start Date	Payment period start date.
Pmt Per. End Date	The payment period end date.

Field	Description
Pmt Per. Count	The count of applicable payment periods.
SAP Evaluation Date	Date of the SAP report. The values in this column are displayed only for SAP reports based on payment period.

9. On the SAP Audit tab, click **Print** to view or print the Student SAP Audit Report.

   Example of a Student SAP Audit Report Based on Term:



Student SAP Audit Report

rpt_AdSAPAuditStudent.rpt
ADMINISTRATOR

10/11/2012
3:14:15PM

Student Name: Ab1000438546, Ge1000438546 **SSN:** 100-04-3854

Campus: Campus Management Institute

Term	Enroll Status	Program Version	GPA Current	Units Earned	Cur. Num Avg
Prev SAP Status	SAP Reason	New Group	GPA Cumulative	Units Attempt	Cum. Num Avg
New SAP Status	Manual Action	User Name	SAP Checkpoint	Hours Att	SAP Evaluation Date
Date Changed	Term Sequence	Comment	Failed Sequence	% Complete	
Ac.Year/Pmt Per.	Pmt Per. Start Date	Pmt Per. End Date	Pmt Per. Count		
	Attending	Credit Associate in Marketing Management		13.00	
SAP Met			4.00	13.00	
SAP Met		System Administrator	0	33.00	
1/17/2007	0		0	100.00	

Linked SAP Enroll: Health Care Administration(Transfer To Other Program)

1 record(s) selected

Fees

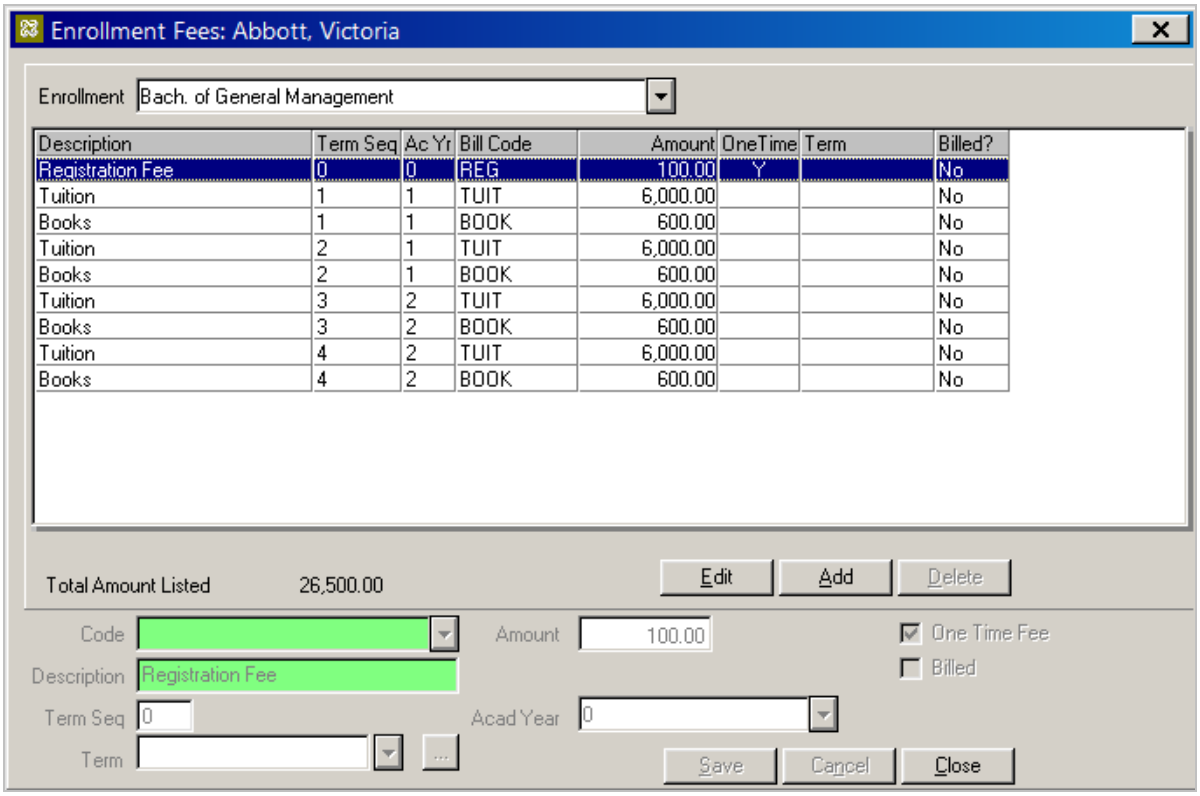
Fees can be established at the enrollment level. You can select from the list of transaction codes and enter amounts to be charged to each student that enrolls in a given program version. When the enrollment is recorded for a given student, the fees listed here are recorded in the student's receivable account.

Your school's billing policies come into play here. Do you charge the entire cost of the program to the student at the time of the enrollment? Or, do you charge certain registration fees, supplies, and so forth?

Edit Enrollment Fees

To enter or edit a fee on the enrollment schedule for a student:

1. Select a student.
2. Navigate to **View** > **Academic Records** > **Fees**. The Enrollment Fees form is displayed. CampusNexus Student lists all fees and fills in the fields with data from the first fee.



3. To add a fee, click **Add** .

   Note: The TUIT code must be used to bill tuition via Registration Billing. Unless an unbilled TUIT item is displayed in a student's Fees folder, the student will not be gathered in the list of students to bill.

4. Click and select the **Code**. Notice that the **Description** field and **Code** field become populated with the data chosen.
5. Enter the correct data in the **Term Seq** field.
6. Click

and select the **Term**. The drop-down list contains all the terms available, with the Start and End Dates for each one.

7. Provide the correct amount in the **Amount** field.
8. Click and select the **Acad Year**.
9. Select if you would like to have the fees gathered or not gathered according to the following rules:

   When billing by academic year, if you selected the **Billed** check box (**Billed = YES)** and the **One Time Fee** check box, those fees will not be gathered when running registration billing.

   When billing by academic year, if you select the **Billed** check box (**Billed = YES)** and do **not** select the **One Time Fee** check box, those fees will be gathered when running registration billing.(Academic Year should be zero.)

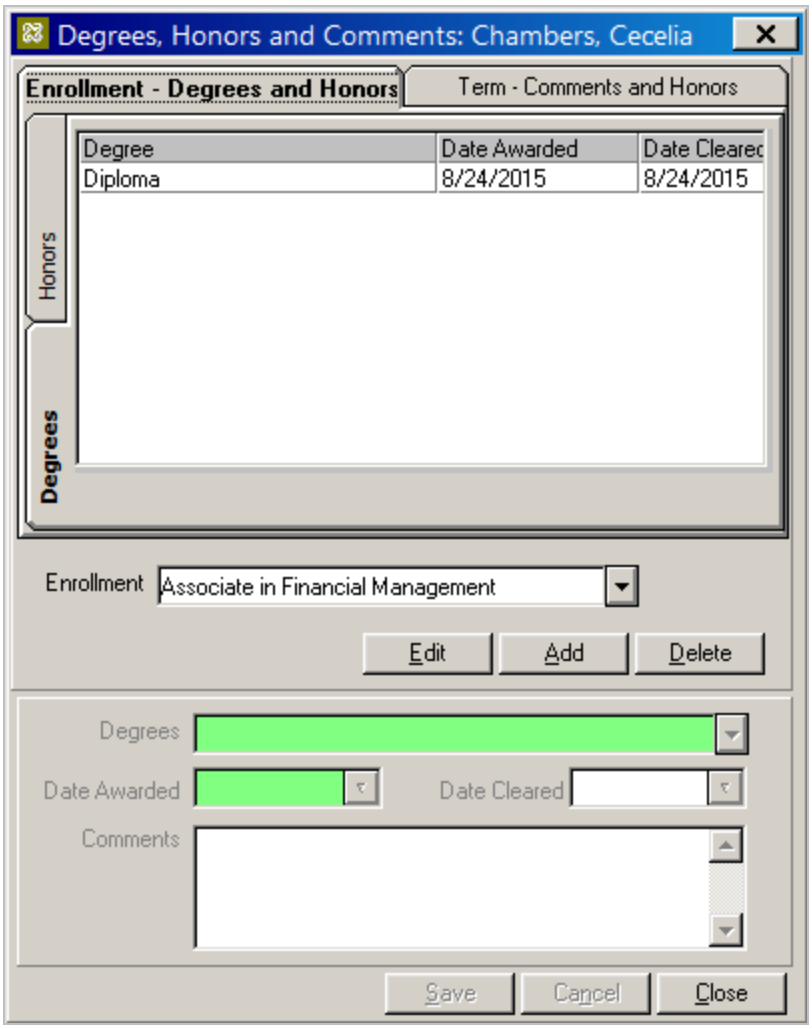
   When billing by academic year, if you do **not** select the **Billed** check box (**Billed = No**), those fees will be gathered when running registration billing.
10. Click **Save** to save the fee record.
11. Click **Edit** to modify a fee other than the first one. Select the fee in the top pane of the screen. The data will appear in the lower pane of the screen.
12. Enter new data or change existing data on the form.
13. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Degrees, Honors, and Comments

The Degrees, Honors, and Comments form enables you to track multiple degrees and the dates that the degrees where awarded. The degrees awarded are printed on the student's transcript. Degrees are related to enrollments. There can be more than one degree associated with a single enrollment. Honors are tracked by term.

To add or edit degrees, honors, and comments:

1. Navigate to **View > Academic Records > Degrees, Honors and Comments**. The Degrees, Honors, and Comments form is displayed.



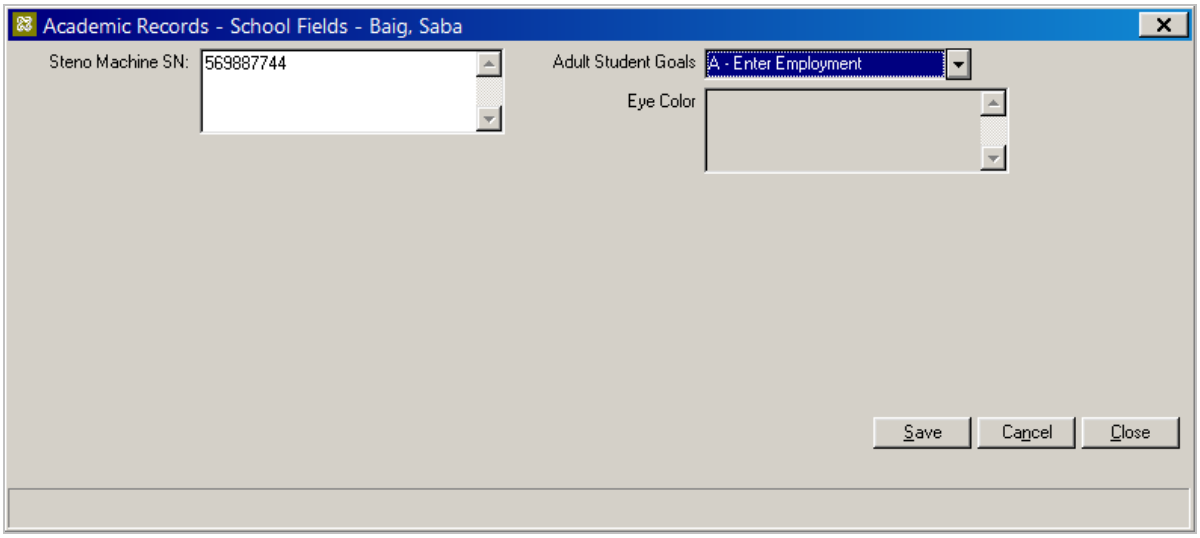
2. Choose an appropriate tab:
   - Select the **Enrollment - Degrees and Honors** tab to view, add, or edit degree records, honors, or comments by enrollment. Select the **Honors** or **Degrees** subtab as needed.
   - Select the **Term - Comments and Honors** tab to view, add, or edit honors or comments by term.
3. Click **Add**, or select a record and click **Edit**.
4. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

School Fields - Academic Records

School-Defined Fields are set up by your system administrator to collect information that is not required by the generic CampusNexus Student application. (See Setup/School Defined Fields.) The fields are organized by department during setup. At least one department has the authority to change each field. Some fields may be viewed but not edited in your department. A field may be flagged as confidential by the originator, i.e., not viewable outside of the department that is using it. For instance, if a field can only be viewed or edited by the Academic Records Department, it will only be visible when the form is opened from View (or Student Bar)> Academic Records > School Fields. If you do not have access to that menu option, you will not see this field.

To view or edit school fields:

1. Navigate to **View** > select a module (for example, Academic Records) > **School Fields**. The School Fields form is displayed.



2. Click on, or tab to, a field that you want to change. Select an option or enter data to edit the field.

   The fields are displayed in edit mode (white background) if your department has been given permission to change the data. Fields that are dimmed cannot be changed. Fields that are listed but are gray and show no data are simply not be filled in yet by the staff member responsible for doing so.

3. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Transfer Credits

Staff members can review the list of courses transferred from other institutions, and add, view, or edit transfer credit information, and add course relationships.

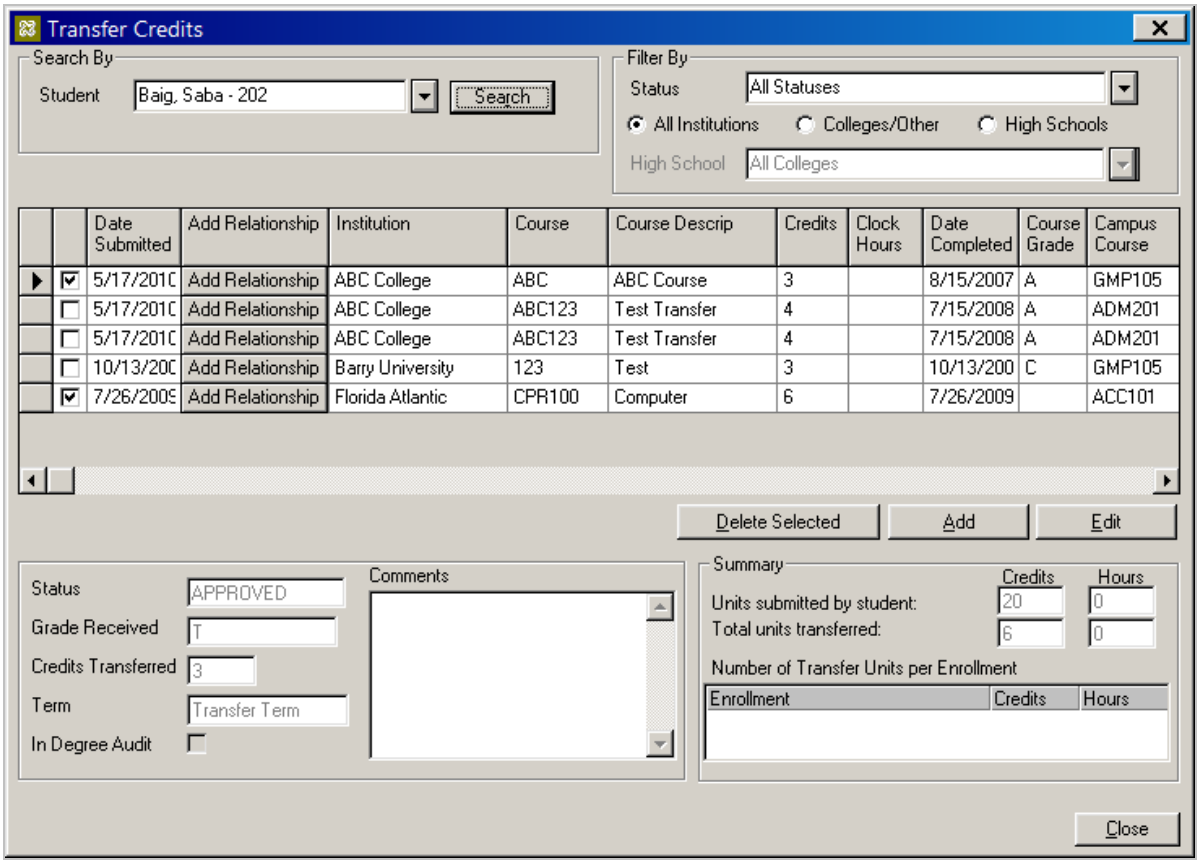
For program versions that use Academic Calendars 5 and 6 (non-term), CampusNexus Student automatically adjusts the Academic Year and Loan Period sequences and associated credits or hours and weeks as transfer credits are 'Approved' or changed from 'Approved' to a different status.

Approved transfer credits or hours in non-term configurations shorten the remaining course work that the student has to complete for the program version and is in direct relation to the academic year or loan period length and sequences. The "Credits in AY" ("Hours in AY") and "Weeks in AY" fields of the final academic year and loan periods are continually adjusted based on changes in the amount of transfer credits or hours.

When CampusNexus Student is enabled for Allow courses to be exempt from progression, the system uses the "Enrollment Status Credits (Hours)" of the linked course as the accepted value instead of the Credits or Hours value of the course on the student schedule when adjusting academic years and loan periods.

To transfer credits for an incoming student:

1. Navigate to **View > Admissions** or **Academic Records > Transfer Credits**.
   - OR -
   Navigate to **Daily > Admissions > Transfer Credits**. The Transfer Credits form is displayed.



Note: The options under **Filter By** allow you to view College transfer credit records, High School transfer credit records, or both (All Institutions). By default, **All Institutions** is selected and the drop-down lists to filter the records are unavailable.

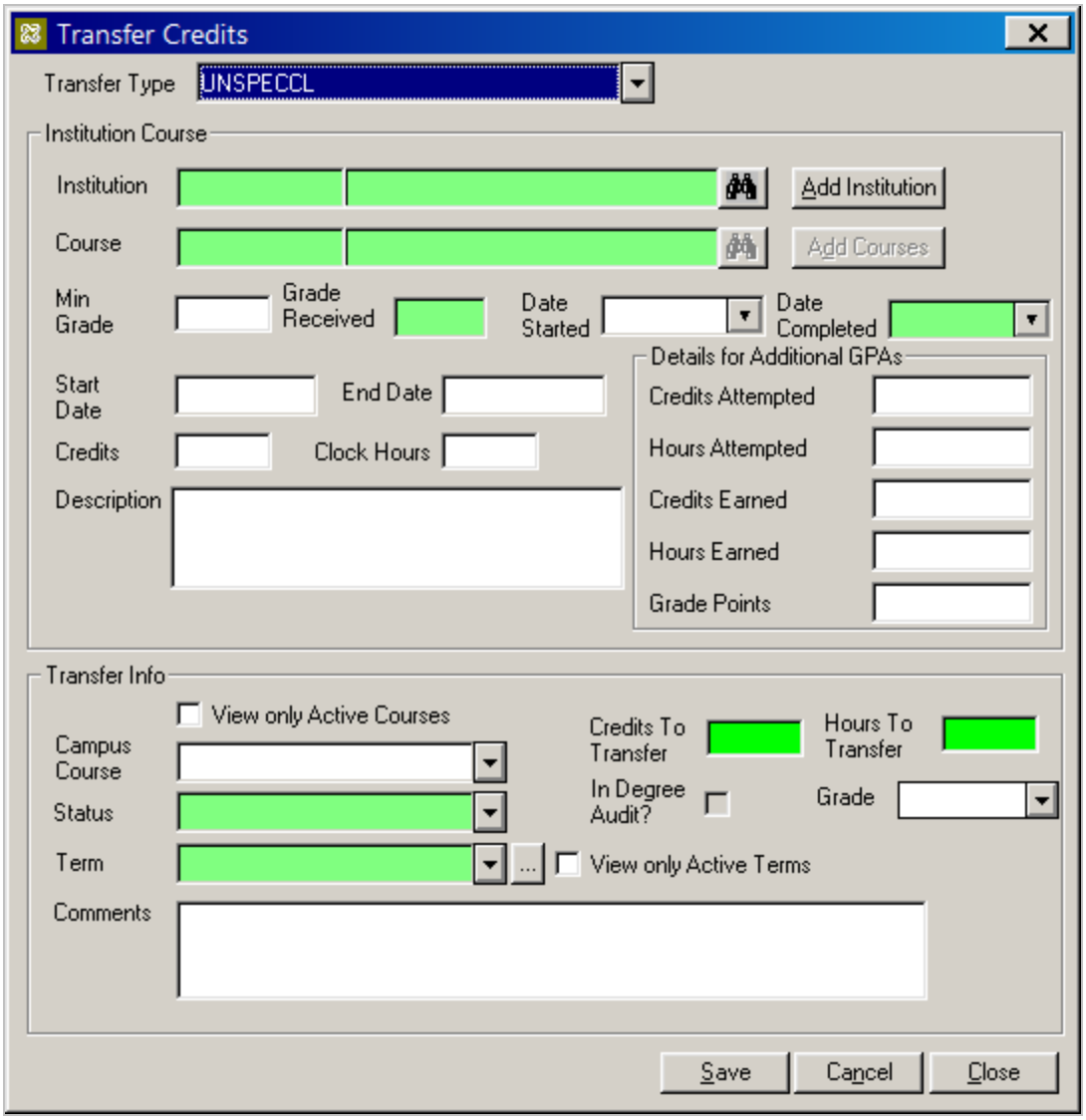
- If you select **Colleges/Other**, the College filter becomes available and only College transfer credit records get listed in the Transfer Credit grid.
- If you select **High Schools**, a High School filter becomes available and only High School transfer credit records get listed in the Transfer Credit grid. The list shows only those high schools for which Transfer Credit records are available.

Note regarding Number of Transfer Credits per Enrollment:

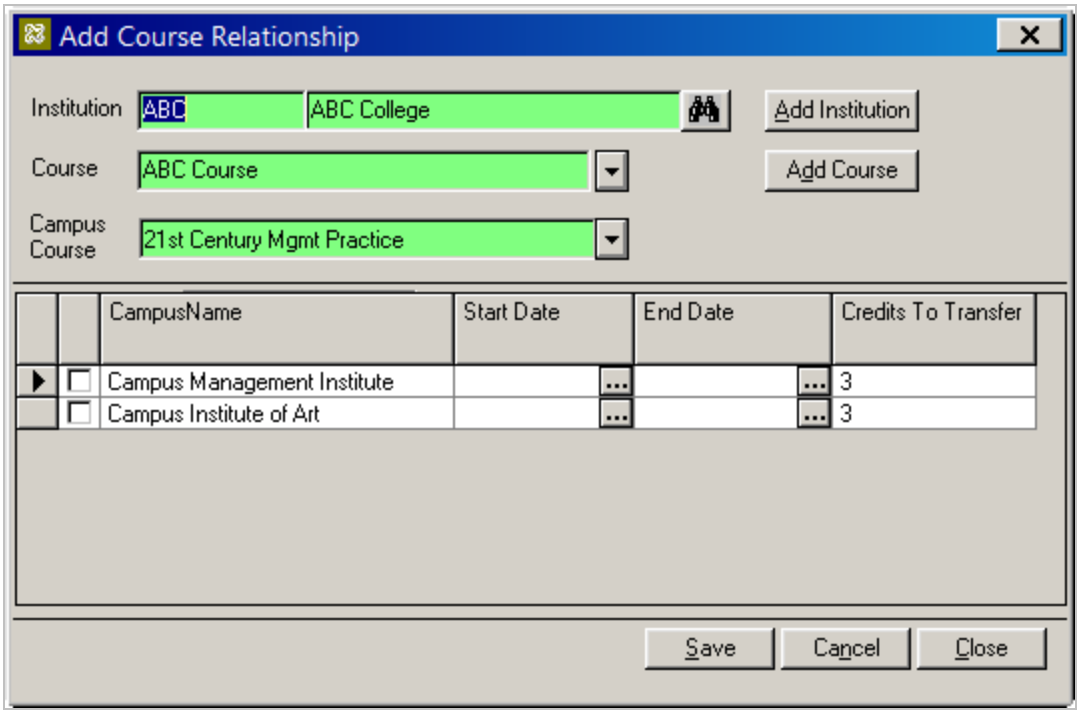
CampusNexus Student accurately tracks and updates the number of Transfer Credits on the student enrollment. If applicable, the following warning is displayed:

Transfer Credits entered exceed the number currently tracked on the enrollment. Automated processes or the academic year tool can be run to update the enrollment and Academic Years. If the student's current Academic Year is adjusted, the student should be repackaged according to the adjustment.

2. Click **Add**, or select a record and click **Edit**. The Transfer Credits form is displayed. The state (enabled/disabled) of **Add Institution** and **Add Courses** buttons depends on the staff member's Admissions security settings.



3. Complete the fields on this form as needed. See Field Descriptions.
4. To add a trans credit relationship to another campus, select a record and click **Add Relationship**. The Add Course Relationship form is displayed. Complete the fields on this form as needed.



5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Field Descriptions

Field	Description
Transfer Type	Use this drop-down list to select College or High School type of transfer credits. The list is populated with the entries available under Lists > Admissions > Transfer Type (tab). **Note**: The Institution Course frame and Transfer Info frame of the Transfer Credits form remain unavailable (dimmed) until you select a Transfer Type. If you select a College Transfer Type, you can Select/Add College and College Courses for transfer credit records. If you select a High School Transfer Type, you can Select/Add High School and High School Courses for transfer credit records.
Institution Course Fields	
Institution	Name of the institution (i.e., College/Other or High School) from where the course is being transferred is displayed in this field. You can use Search to select the institution using the Search College or Search High School forms. If the institution is not listed and you have proper access, click **Add Institution** to display a form with which to add the school.

Field	Description
Course	The name of the course being transferred is displayed in this field. You can select the course using Search. If the course is not listed and you have proper access, click **Add Courses** to display a form to add the course.
Min Grade	Minimum grade allowed for successful completion of the transferred course
Grade Received	Grade the student achieved
Date Started	Date when the student started the course
Date Completed	Date when the student completed the course
Start Date	Effective start date for the course
End Date	End date for the course
Credits	Number of credits the student earned at the institution where the course was taken
Clock Hours	Number of clock hours the student earned at the institution where the course was taken
Description	Brief description of the course
Transfer Info Fields	
View only Active Courses	Select this check box to filter terms by Active only.
Campus Course	Equivalent course offered by the selected campus
Credits to Transfer	Number of credits to transfer
Hours to Transfer	Number of clock hours to transfer
Status	Transfer status. A not yet **APPROVED** transfer status displays on the Degree Progress Audit only if a **Campus Course** is selected on the **Transfer Credits** folder. **Note**: If configured (Lists > Admissions > Transfer Status), the field displays course information on the Degree Progress Audit.
In Degree Audit?	This check box is enabled when the **Campus Course** selected is in the Program Version's required course list.
Grade	The student's grade to associate with the transferred course
Term	Term when the credits are applied **Note**: Non-term functionality in CampusNexus Student allows users to add transfer credits at any point during the student life cycle. Transfer credits adjust the academic year attributes and therefore the time it takes a student to complete the program.
View only Active Terms	Select this check box to filter terms by Active only. By default all terms, active and inactive, appear on the Term list.
Comments	Any related comments

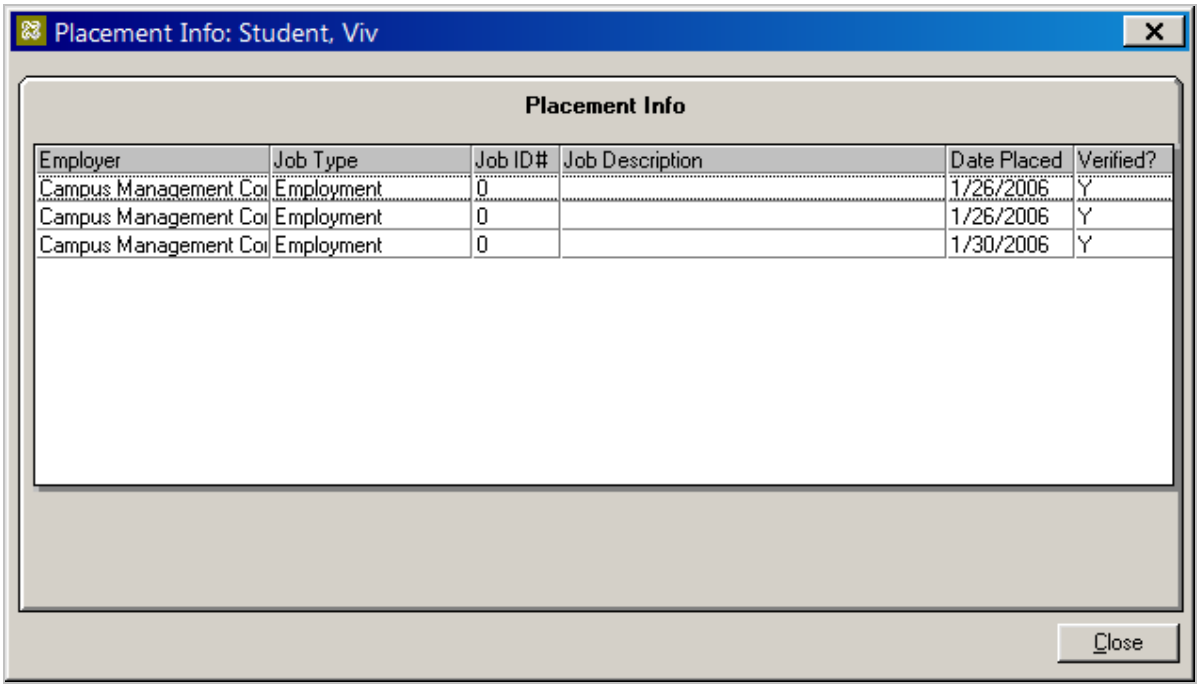
Field	Description
Details for Additional GPAs The fields **Credits Attempted**, **Hours Attempted**, **Credits Earned**, **Hours Earned**, and **Grade Points** capture the information from previous institutions so that you can include courses for students from other schools in a school-defined GPA calculation. See school-defined GPAs/Additional GPAs. When adding a new transfer credit record, the fields Credits Attempted, Hours Attempted, Credits Earned, and Hours Earned are populated from Course Credits and Course Clock Hours as soon as you select a course. If the school-defined GPA is configured to use transfer courses and is a weighted GPA, these grade points are multiplied by the credits attempted to get the quality points for the calculation.	
Credits Attempted	Number of Credits Attempted from the student's transcript
Hours Attempted	Number of Hours Attempted from the student's transcript
Credits Earned	Number of Credits Earned from the student's transcript
Hours Earned	Number of Hours Earned from the student's transcript
Grade Points	Number of Grade Points from the student's transcript

Placement Info

The Placement Info form displays a student's employer, job type, job number, job description, placement date, and verification status.

To view a student's placements:

1. Select a student.
2. Navigate to **View** > **Academic Records** > **Placement Info**. The Placement Info form is displayed.



3. Click **Close** to close the form.

Note: To add or edit placement information, navigate to **View** > **Career Services** > **Placements**. For more information, see Student Placements.

Term Confirmation Overview

The Term Confirmation feature allows clients to determine the Starting Student Body (SSB) for a current or upcoming term. System administrators turn Term Confirmation on and off when setting up campus locations and make it available by staff group permissions in Setup > Security. The default setting for Term Confirmation is None. Select "Automatically Unconfirm a Term…" to have CampusNexus Student set a term to unconfirmed when all courses in a term are unregistered. Only registration terms may be confirmed. Therefore, a typical Parent term cannot be confirmed and the confirmation is on the child term.

Clients set student Term Confirmation status under the Academic Records menu and review it from the Enrollment menu Term Summary. Clients can generate a printed report called Registered Credits by Confirmed Terms, or export data in Excel and other formats.

As soon as a term is confirmed, CampusNexus Student updates the "Confirmed" flag on the Term Summary form to "Yes." If the Campus Location setting is "No" for Automatic Unconfirm and the term is confirmed on the Term Summary form, the student will remain confirmed for the term even if the student unregisters for all courses in the term.

If the campus-specific setting allows automatic unconfirmation, the term can be unconfirmed only if all courses for the term are unregistered. If the student unregisters for all courses that were previously confirmed, CampusNexus Student removes the term from the Term Confirmations and Term Summary forms.

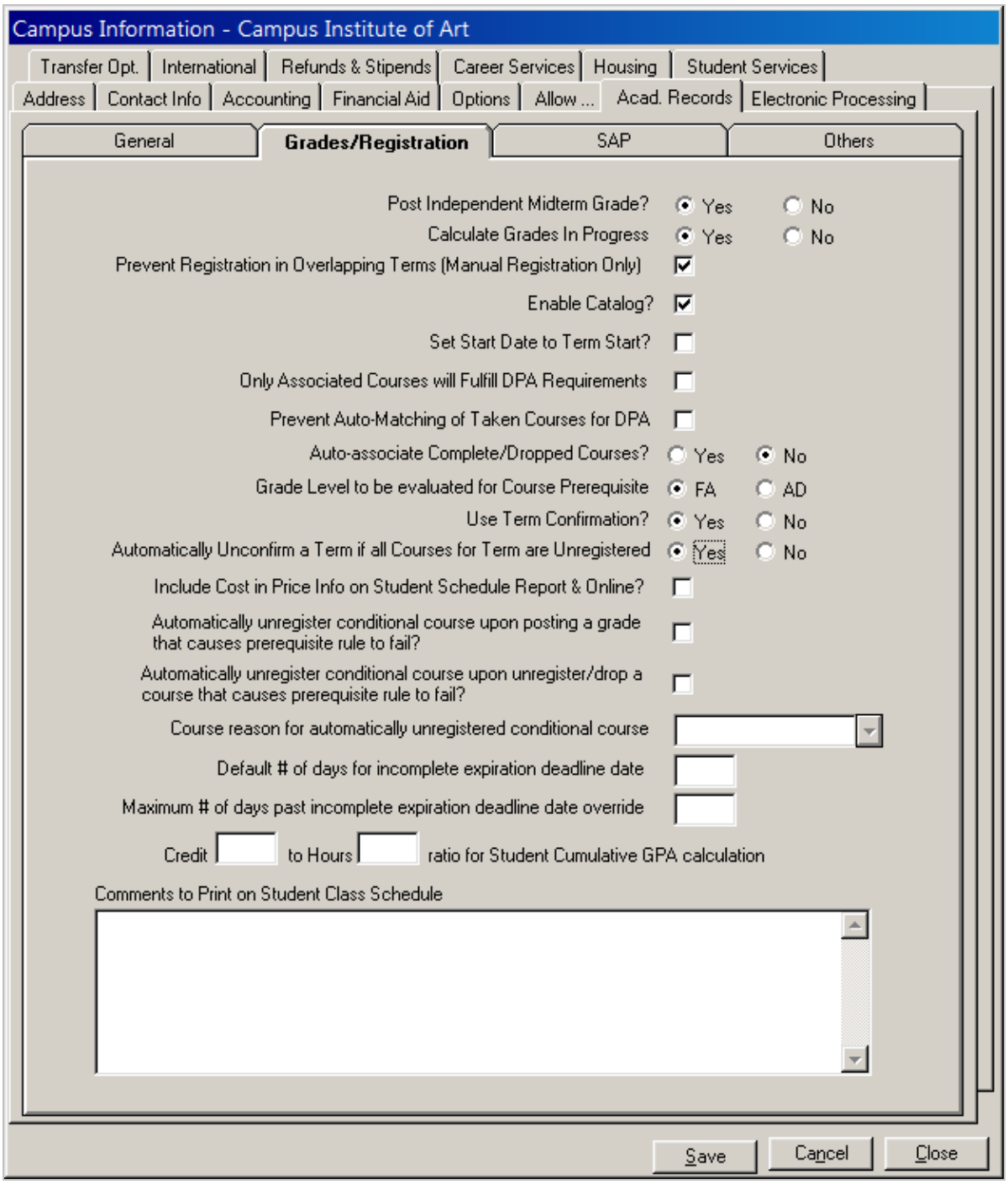
Term Confirmations options on the Student Bar and View menus are visible or hidden according to CampusNexus Student form level security and Campus settings for Term Confirmations.

Term Confirmation Setup

CampusNexus Student establishes Term Confirmation status at the Campus Location level.

To enable the Term Confirmation feature:

1. Navigate to **Setup > Campus Locations > <select a campus> Academic Records**.
2. Select the **Grades/Registration** tab.



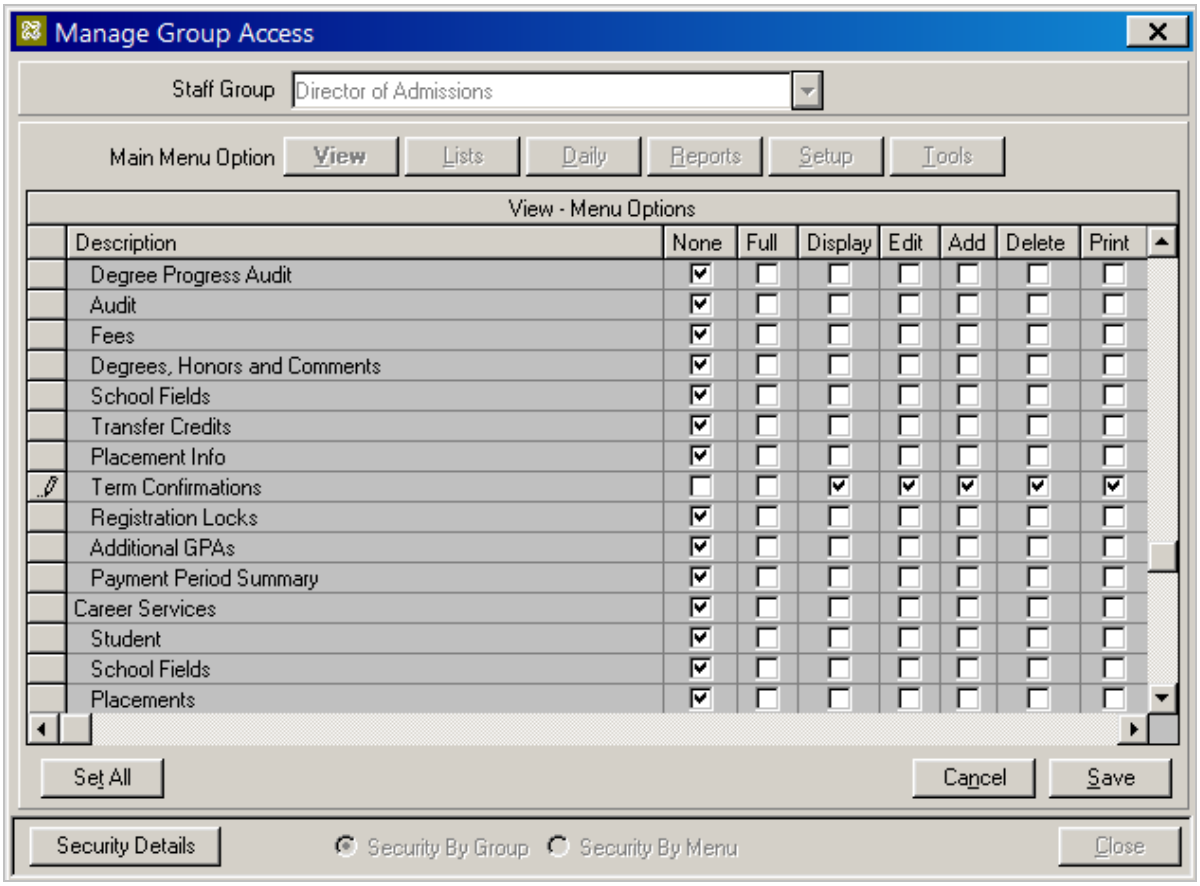
3. Select **Yes** for *Use Term Confirmation?* to enable the Term Confirmation feature.
4. Select **Yes** for *Automatically Unconfirm if all Courses for Term are Unregistered*.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Term Confirmation Staff Access

CampusNexus Student security establishes permissions to set or change Term Confirmation status at the staff group level.

To assign Term Confirmation permissions:

1. Navigate to **Setup > Security**.
2. Select the **Staff Group** for which you want to establish Term Confirmation permissions.
3. Click **View** and scroll down to Term Confirmations.



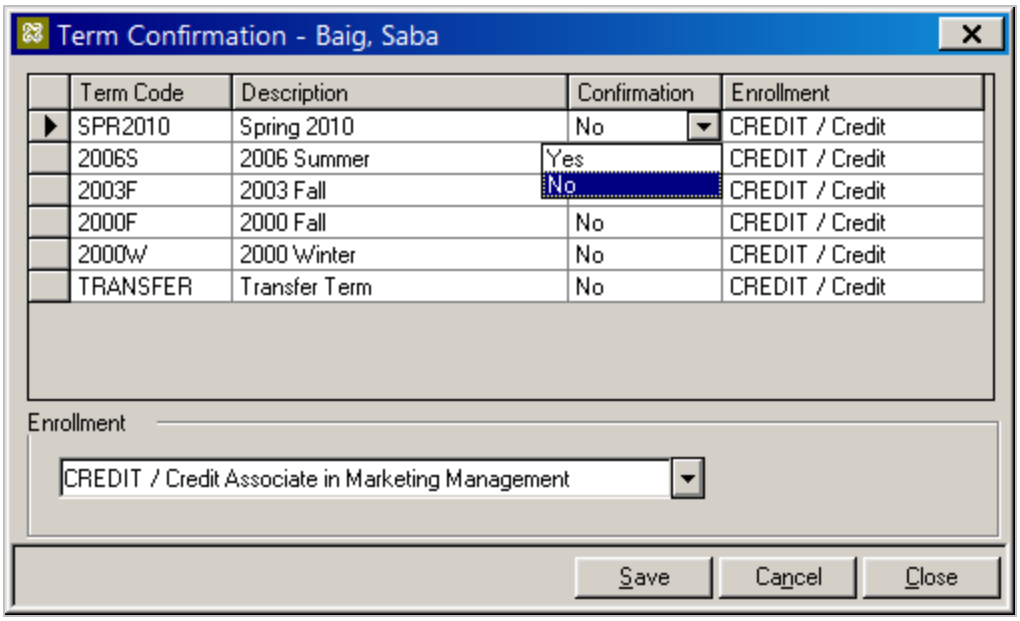
4. Select **Display**, **Edit**, **Add**, **Delete**, or **Print** permissions, or select **Full** to select all permissions.
5. Click **Save**.
6. Click **Close** to close the form.

Student Term Confirmation Status

Authorized staff can set or change student Term Confirmation status and review the settings on the Term Summary tab of the Enrollment form.

To set the student Term Confirmation status:

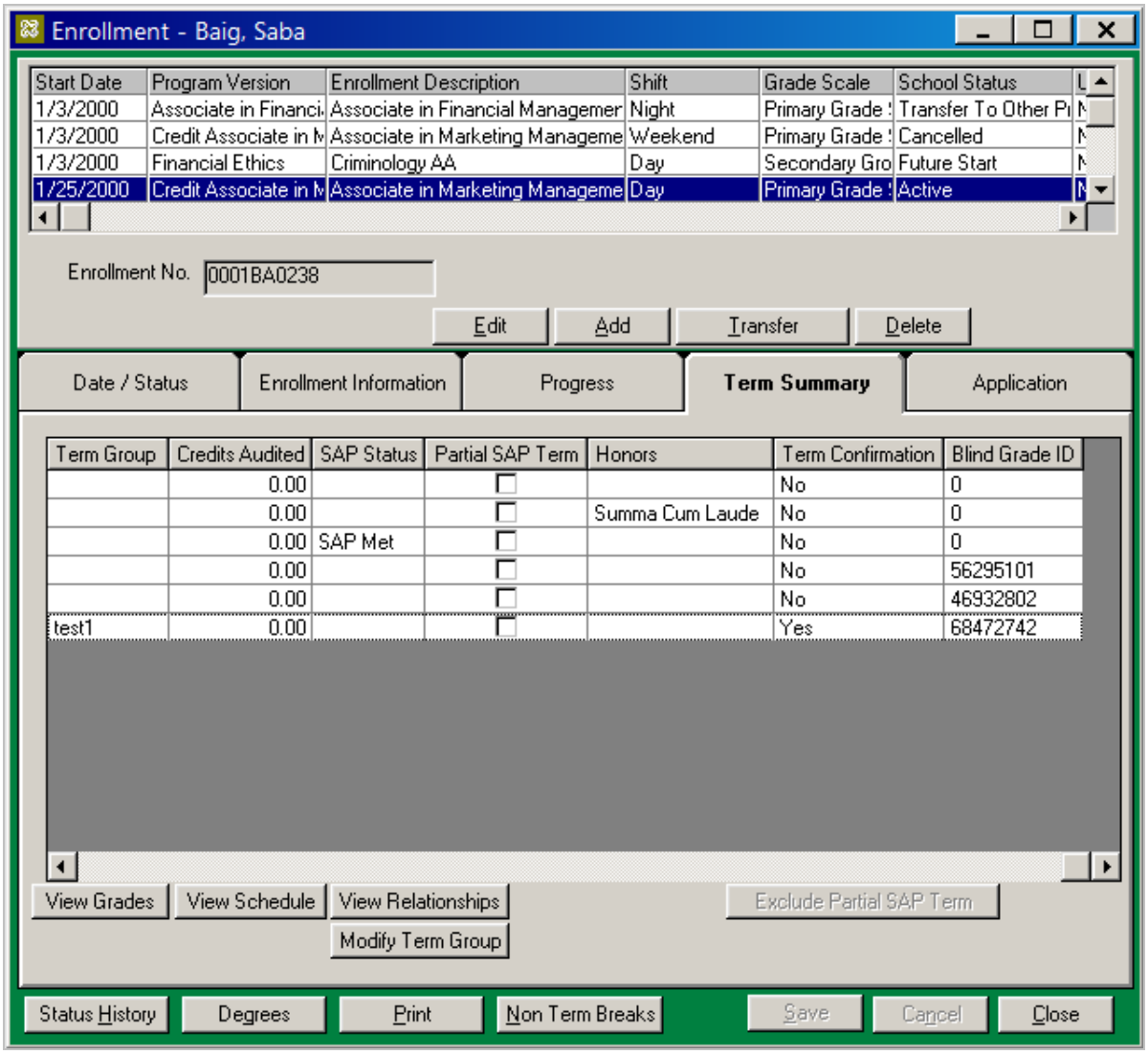
1. Select a student.
2. Navigate to **View > Academic Records > Term Confirmations** or select Term Confirmations from the Academic Records option of the Student menu. The Term Confirmation form for the selected student is displayed.



3. Use the **Confirmation** drop-down menu to set the term confirmation status for that student in a term. The default setting is No. The other fields of this form are locked and cannot be edited.
4. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

To review the Term Confirmation settings for a student:

1. Select a student.
2. Navigate to **View > Academic Records > Enrollment**.
3. Select the **Term Summary** tab and scroll to the right to review the Term Confirmation status. This status is locked and cannot be edited on this form.



4. Click **Close** to close the form.

Registration Locks

The Registration Locks form can be used in two different modes, depending on where the form is opened.

- Student mode allows you to configure registration locks for a specific student.
- Student group mode allows you to configure registration locks for a student group.

Use the Registration Locks form to associate a registration lock with a student or student group. You can add, edit, and delete registration locks.

To manage Registration Locks:

1. To open the Registration Locks form in student mode, navigate to **View** > **Academic Records** > **Registration Locks**.

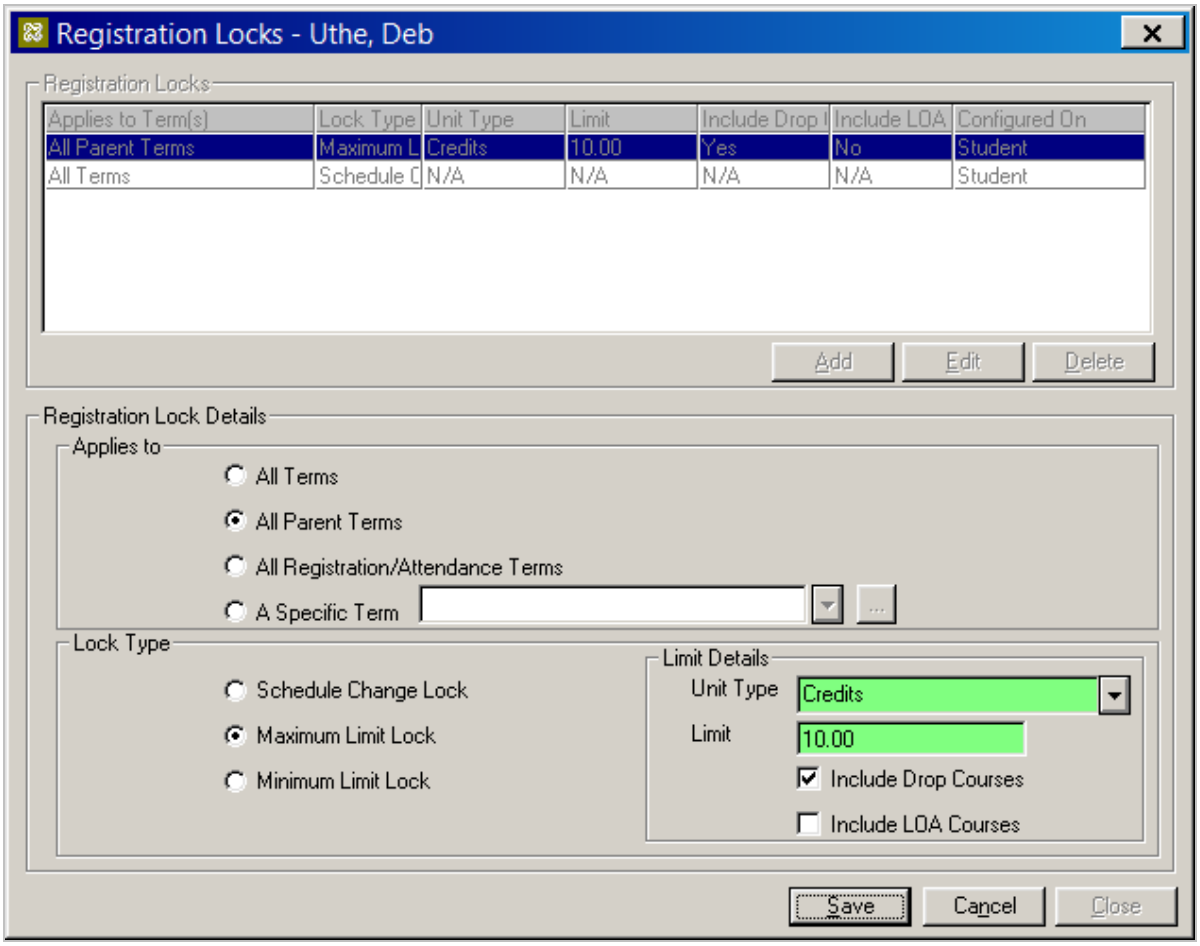
   - OR -

   To open the form in student group mode, navigate to **View** > **Student Groups**, select a student group and click **Registration Locks**.

   The Registration Locks form is displayed. This grid displays the details of all registration locks configured for a student or student group. The grid data is sorted in descending order (i.e., the last record created is the first row in the grid).

   - If the form was opened in student mode, the grid displays all registration locks associated with the student and registration locks configured for any student group to which the student belongs.
   - If the form was opened in student group mode, the grid displays all registration locks associated with the student group.

   Registration locks configured for an inactive student group are displayed in both student and student group modes, even though such locks are not enforced when they are evaluated.



2. Click **Add** in the Registration Locks grid section to add a registration lock.

   - When in student mode, any newly added registration lock is associated with the student, and not a student group.
   - When in student group mode, any newly added registration lock is associated with the student group.

   - OR -

   Click **Edit** to modify an existing registration lock.

   Note: When in student mode, the **Edit** button is disabled if the selected registration lock is a student group configured lock.

3. Specify the Registration Lock Details for the student or student group as appropriate.

   a. In the Applies to section, select one of the following term types.

      - **All Terms** - to configure the registration lock for all terms.
      - **All Parent Terms** - to configure the registration lock for all terms of type parent (terms which have children).
      - **All Registration/Attendance Terms** - to configure the registration lock for all terms of type

registration/attendance.

- **A Specific Term** - to configure the registration lock for a specific term. When this option is selected, the adjacent drop-down box, along with the button, becomes enabled and a term selection is required. The drop-down box is populated with terms that satisfy the following criteria:
  - Active Terms.
  - Terms which are not closed.
  - In student mode, terms that are associated with the student's campus or at least one of the student's enrollment campuses
  - In student group mode, terms that are applicable to at least one of the students in the student group.
  - Terms that are parent terms (i.e., there is at least one child term associated with the term and the child term usage is "Registration/Attendance"), or have their term usage set to "Registration/Attendance" in the term setup.

b. In the Lock Type section, select one of the following options:

- **Schedule Change Lock** - to configure the registration lock type as "Schedule Change" (prevents course registration, unregistering a course, and drops).
- **Maximum Limit Lock** - to configure the registration lock type as "Maximum Limit".
- **Minimum Limit Lock** - to configure the registration lock type as "Minimum Limit".

Note: When you select Maximum/Minimum lock types, the **Limit Details** section is enabled requiring you to specify the **Unit Type** and **Limit**.

c. In the Limit Details section, select one of the following options:

- **Unit Type** - to configure the unit type. Options available are: Credits; Enroll Status Credits; Enroll Status Hours; and Hours.
- **Limit** - to configure the limit for the selected unit type.
- **Include Drop Courses** - to configure if dropped courses are included when evaluating the Minimum and Maximum limit.
- **Include LOA Courses** - to configure if Leave of Absence (LOA) courses is included when evaluating the Minimum and Maximum limit.

4. Click **Save** to save your changes, or **Cancel** to discard any changes.
5. Click **Delete** to delete a registration lock. Click **Yes** confirm.

   Note: In student mode, the **Delete** button is disabled if the selected registration lock is a student group configured lock.
6. Click **Close** to close the form.

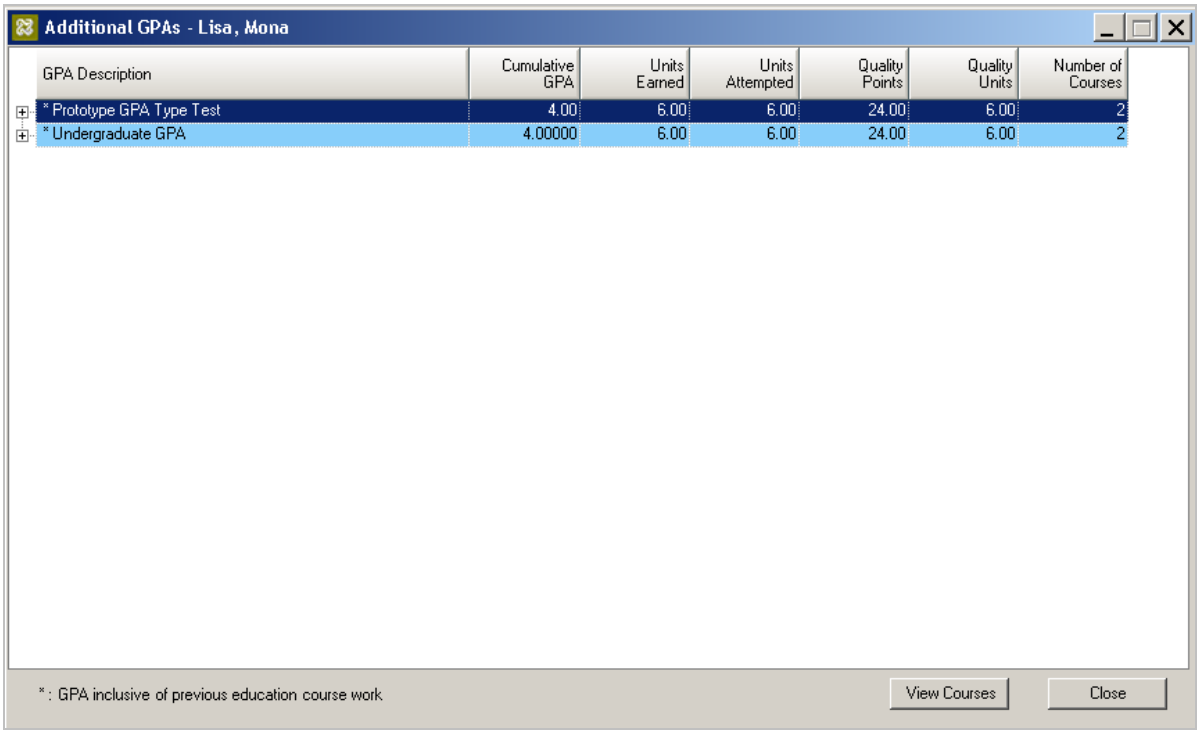
Additional GPAs

This form consists of all additional, non-system GPAs in a view -only format. (there are no options to save or edit for security purposes).

To view additional GPAs:

1. Select a student.
2. Navigate to **View** > **Academic Records** > **Additional GPAs**. The Additional GPAs form for the selected student is displayed.

   Note: If there are no additional school-defined GPAs, the following message is displayed: *No additional GPAs are calculated for the student*.



   Within the main cumulative GPA view, you can view the courses for a specific GPA. Additionally, when the GPA is configured to do so, you may also view a term by term breakdown of the GPA calculation.

   The Cumulative GPA column includes all courses taken that are selected to be included in the GPA calculation. In the case of a cumulative GPA displayed on a term, it consists of all the courses taken up to and within the terms that are also selected to be included in the GPA calculation. The current GPA is made up of only the courses that occurred in that term.

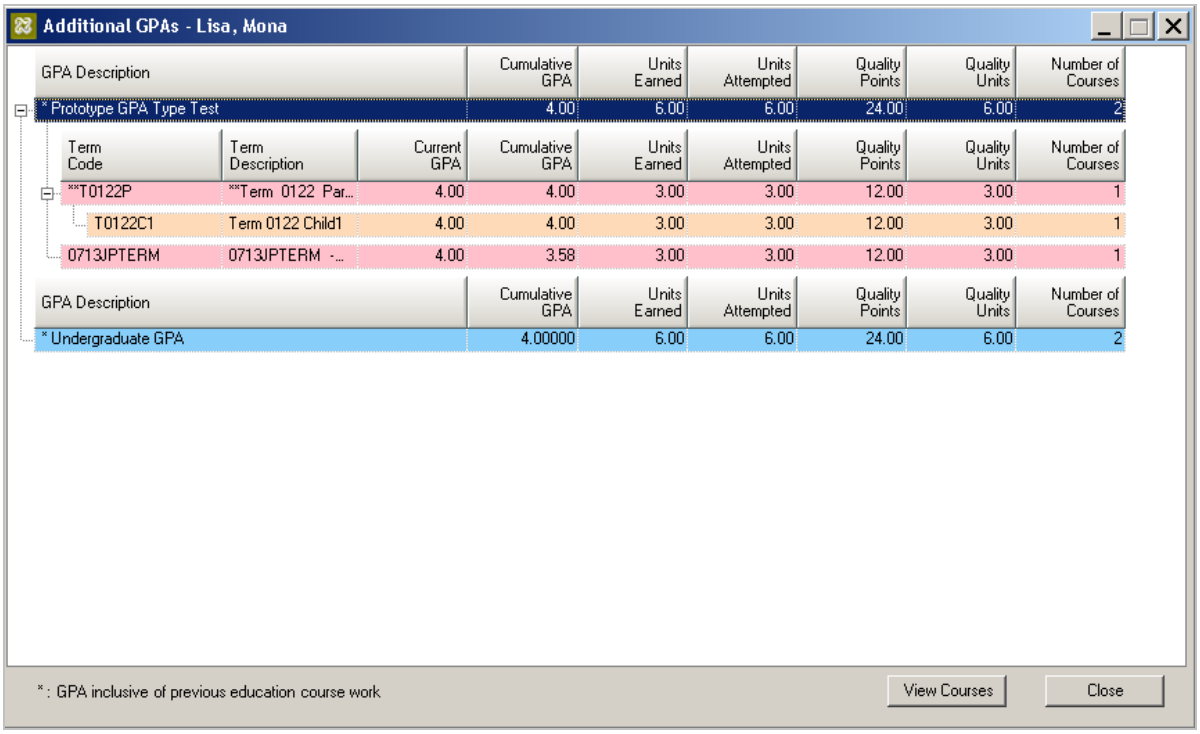
3. Click **View Courses** to see all the student's courses taken. If the GPA has been configured with any of the Previous Education options based on transfer records, all of the student's courses from the transfer credit folder appear in the lower half of the form, labeled Previous Education Courses.

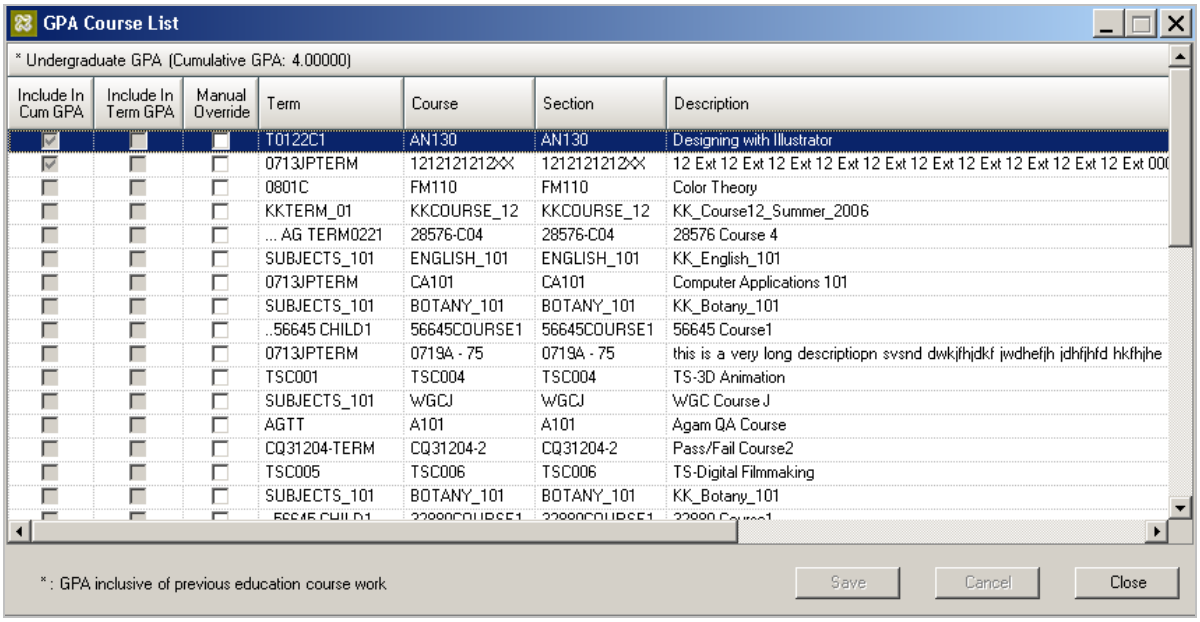
   Click the column headers to sort the data. The default sort order on this form is by Course Description.

If an asterisk appears to the left of the GPA Description, the GPA has been configured with one of the **Previous Education** options enabled.

When a GPA has been configured to **Include Term Calculations**, every term that a student has taken courses is listed regardless of whether any courses from that term are included in the GPA calculation. The Units Earned, Units Attempted, Quality Points, Quality Units and Number of Courses are totals that reflect that term only.

The Additional GPAs form displays the weighted and unweighted courses separately in the two sections on the form.





Note: The configurable GPA Type options determine which courses are included in the GPA calculations by default. Each time a new grade is posted, applicable courses are selected as included in the GPA on this form. Graded courses that do not satisfy the GPA configurations are listed as not included. Users with edit permissions on this form can override this and include the course in the calculation. Additionally, these users can edit the **Units Attempted** and **Units Earned** for students. These new GPAs will always be student-based, meaning courses from all enrollments are available for inclusion.

All completed and dropped courses are displayed for the student as long as grades are posted.

4. Click **Close** to close the form.

Note: For clients using the HOPE GPA, beginning in Fall 2011 the Learning Support Courses is excluded from the GPA calculation. Learning Support Courses are identified by being flagged as Remedial.

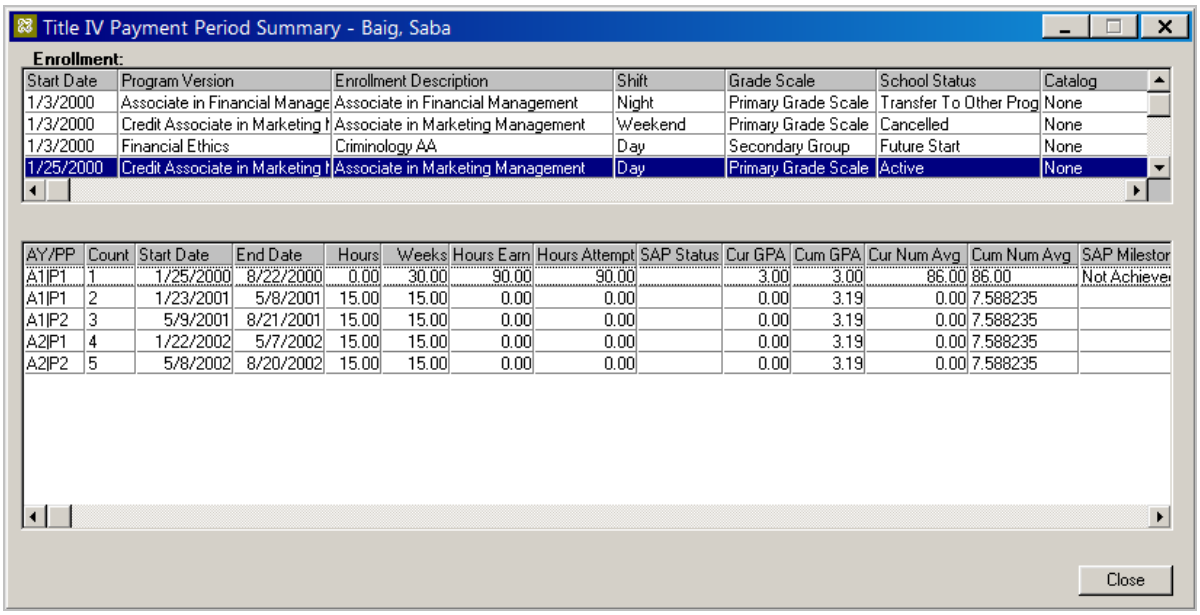
Payment Period Summary

The Title IV Payment Period Summary form enables academic advisors to view Payment Period summary results for students that are evaluated through SAP based on a completed Payment Period.

For information about locking payment periods, see Payment Period Locking and the Completed Flag.

To view the payment period summary:

1. Select a student.
2. Navigate to **View** > **Academic Records** > **Payment Period Summary**. The Title IV Payment Period Summary form for the selected student is displayed.



3. Select an **Enrollment**. The enrollment details are displayed in the grid below.

   The Payment Period Summary form displays the proper amount of time in the Hours Att and Hours Sched fields for students enrolled in Clock Hours programs with a program specified to use scheduled hours (the Use Scheduled Hours check box is selected on the Program Versions form). This information matches what is present on the Final Grades form once attendance is posted

   Note: Hours must be posted for these fields to be occupied.

4. Click **Close** to close the form.

Payment Period Locking and the Completed Flag

About the Completed Flag

The Completed flag for a payment period is set automatically by CampusNexus Student when the instructional weeks date for the payment period is equal to or less than the system date and there are enough credits earned for a credit hour payment period or enough clock hours posted for a clock hour payment period. When the Completed flag is set on a payment period, the Student Pace Evaluation Tool (SPE) will not automatically change any dates associated with that payment period.

Locking Payment Periods

CampusNexus Student allows users to exclude Academic Year, Loan Period, and payment periods from Auto-Adjustment. “Locking” or excluding those objects from auto-adjustment can be done on the Academic Year, Loan Period and Payment Period forms for a user with the proper permissions. It is important to note that locks applied to Academic Years and the associated payment periods are independent of the locks that are applied to Loan Periods and their associated payment periods.

Locks applied to the start date of an Academic Year/Loan Period and Payment Period 1

Locking a Payment Period 1 will prevent the start date of Payment Period 1 and the start date of the associated Academic Year or Loan period from being adjusted by the Student Pace Evaluation (SPE) Tool. This also prevents any dates from previous Academic Years, Loan Periods and associated payment periods from being adjusted as locks will be auto-applied to those objects. Locks applied to these start dates will still allow the SPE Tool to continue to adjust the end date of Payment Period 1, the start and end date of Payment Period 2 as well as the end date of the Academic Year and Loan Period. All subsequent Academic Years, Loan Periods and their associated objects are adjusted as well.

Locks applied to the end date of an Academic Year/Loan Period and Payment Period 2

Locking a Payment Period 2 will prevent the end date of Payment Period 2 and the end date of the associated Academic Year or Loan period from being adjusted by the SPE Tool. This also prevents any dates prior to the end date of the Academic Years, Loan Periods and associated Payment Period 2 from being adjusted as locks will be auto-applied to those objects. All Prior Academic Years, Loan Periods and their associated objects are locked and excluded from adjustment as well.

Auto Locks

The Student Pace Evaluation Tool Settings form contains a tab where the an administrator can configure CampusNexus Student to apply locks automatically. Please reference the Auto-Locks Help for more information.

Locking Academic Year End vs. Completing the Academic Year

Locks applied to payment periods do not affect the setting of the Completed flag because the criteria for setting the Completed flag involves measuring progression. The Completed flag can also be switched back to Uncompleted if lingering grades affecting the Completion criteria are entered after the Payment Period is marked Complete. This would allow CampusNexus Student to re-adjust the payment period. Locks can be removed or added at anytime by a staff user with permissions to allow CampusNexus Student to make adjustments to a payment period not marked as completed.

Note: Locks and completed flags do not restrict a user from manually changing the dates of Academic Years, Loan Periods or their associated objects.

View > Career Services

The Career Services View menu leads to functions related to job placement. The options on this menu apply to the student selected from the Recent Students list.

Menu Item	Description
Student	Displays the Student Master form.
School Fields	Displays the form used to view or enter data in school-defined fields related to the Career Services module and public fields from other modules.
Placements	Displays exit interview data and job placements for the student. You can edit the data.
Status History	Displays a history of student placement status changes.
Certifications	Displays the student's certifications.
Audit	Displays Placement Record Fields Audit, Deleted Student Placement Records, and Career Services Advisor Audit folders.

The options on the Student Bar are the same as the options on the View menu, unless the Student Bar has been altered by the user.

The Career Services module in CampusNexus Student is designed for efficient monitoring of student placement opportunities. It provides a database of employers, jobs available, exit interviews, student-related employment activity, and student employment history.

You can enter new employer information, new jobs, and interview activity. Jobs can be categorized by industry and job type. When students are placed, you can indicate such data as in field of study, related field, out of field of study, and so on.

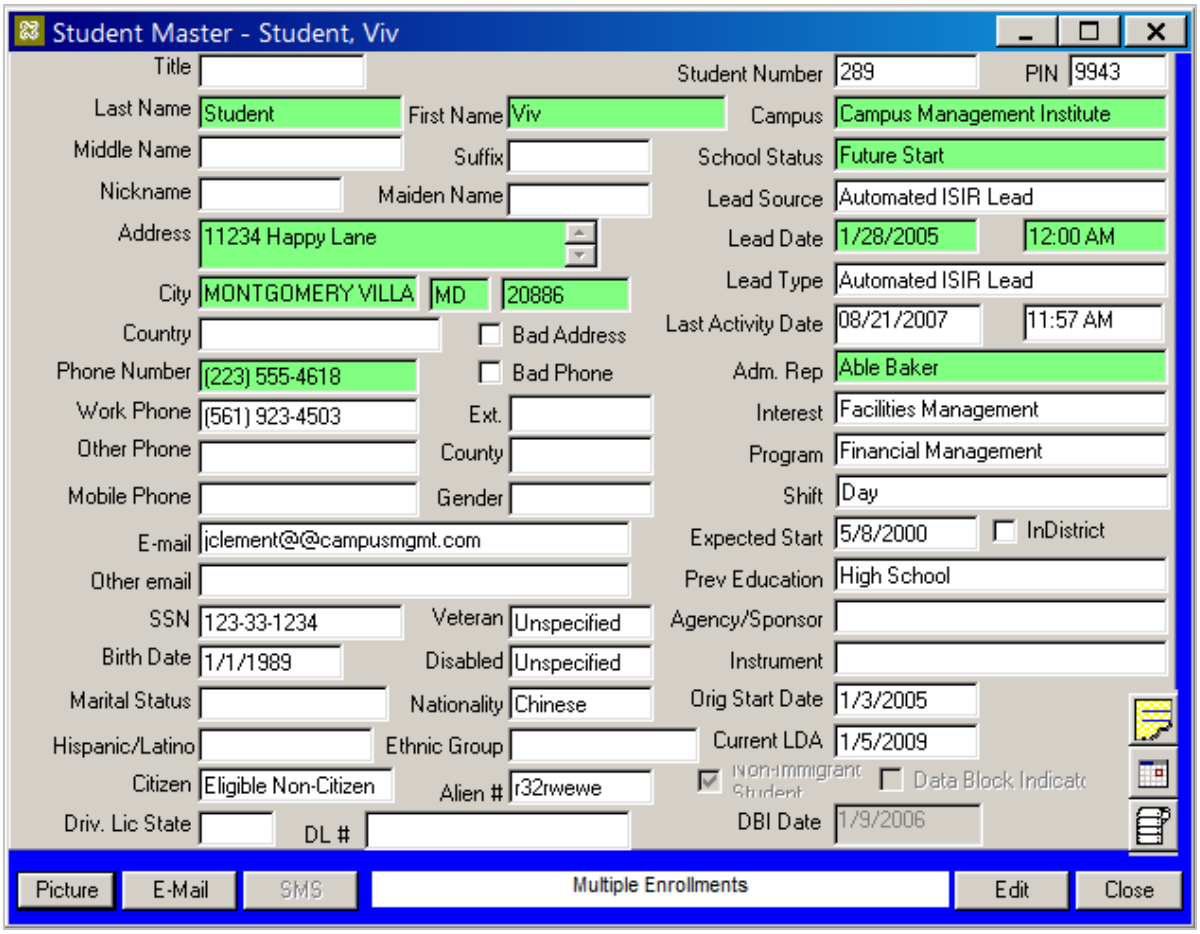
Job listings can be reported individually for bulletin board posting and can contain only the data that you find is necessary for the report's usage. Many other Career Services Reports can be viewed and printed.

Student Master

The Student Master form contains much of a student's basic demographic information. The Student Master form is usually (but not necessarily) populated in the Admissions module by adding a new lead to the database. New leads are entered using the Quick Lead Entry form or the Add New Lead **Ctrl+L** option on the File menu. The **Ctrl+N** key combination can also be used to start a new Student Master record (form) without entering a quick lead.

To view a Student Master form:

1. Select one of the following options:
    - Click **Student** on the Student Bar.
    - Double-click **Recent Students** on the Toolbar. When you change the student in the Recent Students list, a new Student Master form is displayed. If you already have a Student Master form open, it remains open in the background.
    - From the **View** menu navigate as follows:
        - Contact Manager > Student
        - Admissions > Student
        - Financial Aid > Student
        - Student Accounts > Student
        - Academic Records > Student
        - Career Services > Student
        - Loan Management > Student
        - Student Services > Student
        - Housing > Student
    - Use the **Find** menu or click on the Toolbar to search for a student.



Note: The border color around the Student Master form indicates the student's status category. In the setup options under Setup > Status Codes > Colors Tab, your system administrator can choose colors for the status categories.

2. Multiple Student Master forms can be displayed at the same time. The forms always open in the same place in the work area. Unless you have closed, moved, or minimized a previous Student Master form, the next form you open covers the previous form.

   To move between open Student Master forms use the **Window** menu and select **Tile** or **Cascade** to organize all open forms in the work area.

   When you are working with multiple students, ensure that the correct form is current (active). The name of the current student is always shown in the Recent Students text box. The title bar of the active form is always a different color than other forms which may be open in your work area.

3. To edit the information on the form, click **Edit**. See Edit a Student Master.

   Required fields on the form have a background color other than white. If a required field is blank, you must enter data in it when you edit the form, even if you did not intend to provide the information when you clicked Edit.

   Some fields are required by CampusNexus Student (Last Name, First Name, Lead Date, Admissions Rep). Additionally, your institution may designate other fields as required. The system administrator can mark fields as required in either of two ways.

- Open any Student Master (or Quick Lead) form and go to Setup > Required Fields.
- Designate the field as required in the Data Dictionary.

4. To add an activity from the Student Master form, click the **Add Activity** icon at the bottom right of the form. The Activity form is displayed.
5. Click **Close** (Ctrl+F4) to close the active Student Master form. If you are in edit mode when you click Close, you are prompted to save any changes.

Duplicate Student Records

CampusNexus Student checks for duplicate Student Master records when new leads or students are added. The following table columns are used to check for duplicates:

- Student ID
- Social Security Number
- Phone Number
- Date of Birth and Student Name (combined)
- Driver's License Number
- E-mail address.

Each check is performed only if you entered data in the corresponding field. If at least one match is found, a grid showing the matches is displayed

If the lead is a duplicate and can be found on the grid, click the record and the lead form is populated with the information for that lead. The information can then be edited. The campus for the lead can be changed only if the campus ID for the record from the grid is in the list of campuses to which you have access.

School Fields - Placement

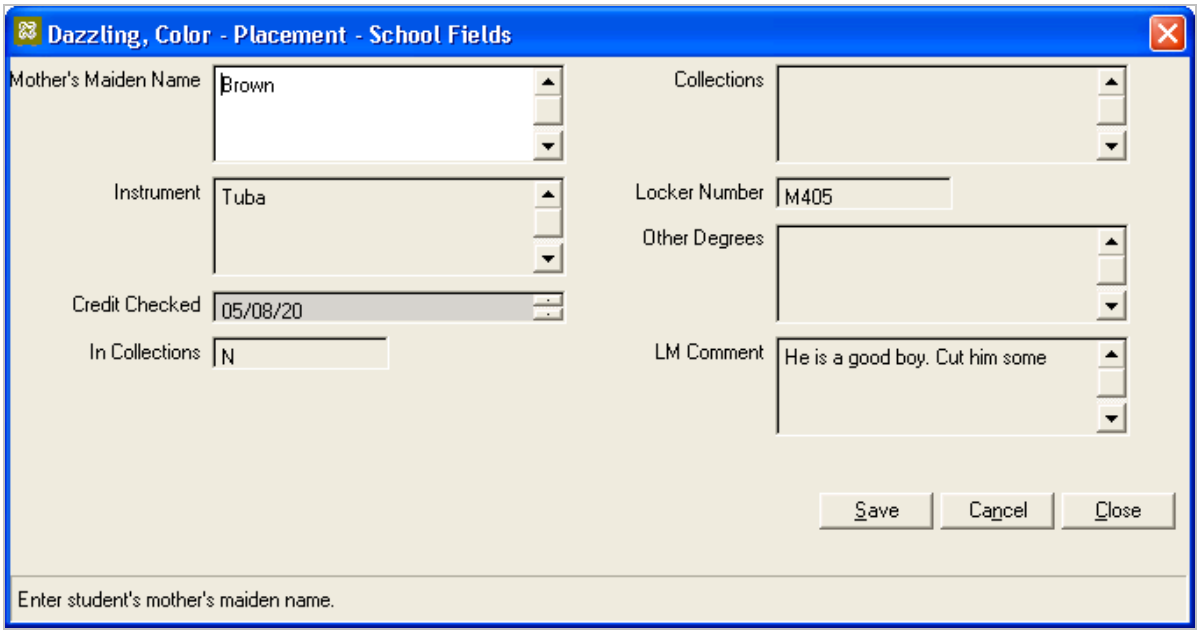
School Defined Fields are set up by your system administrator to collect information that is not required by the generic CampusNexus Student application. See Setup > School Defined Fields.

The fields are organized by department during setup. At least one department has the authority to change each field.

Some fields may be viewed but not edited in your department. A field may be flagged as confidential by the originator, i.e., not viewable outside of the department that is using it. For instance, if a field can only be viewed or edited by the Career Services Department, it will only be visible when the form is opened from View > Career Services > School Fields. If you do not have access to that menu option, you will not see this field.

To view or edit school fields:

1. Navigate to **View > Career Services > School Fields**. The School Fields form is displayed.



2. Click on a field that you want to change. Select an option or enter data to edit the field.

   The fields are displayed in edit mode (white background) if your department has permission to change the data. Fields that are "dimmed" cannot be changed. Fields that are gray and show no data are not filled in yet by the staff member responsible for doing so.

3. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Student Placements

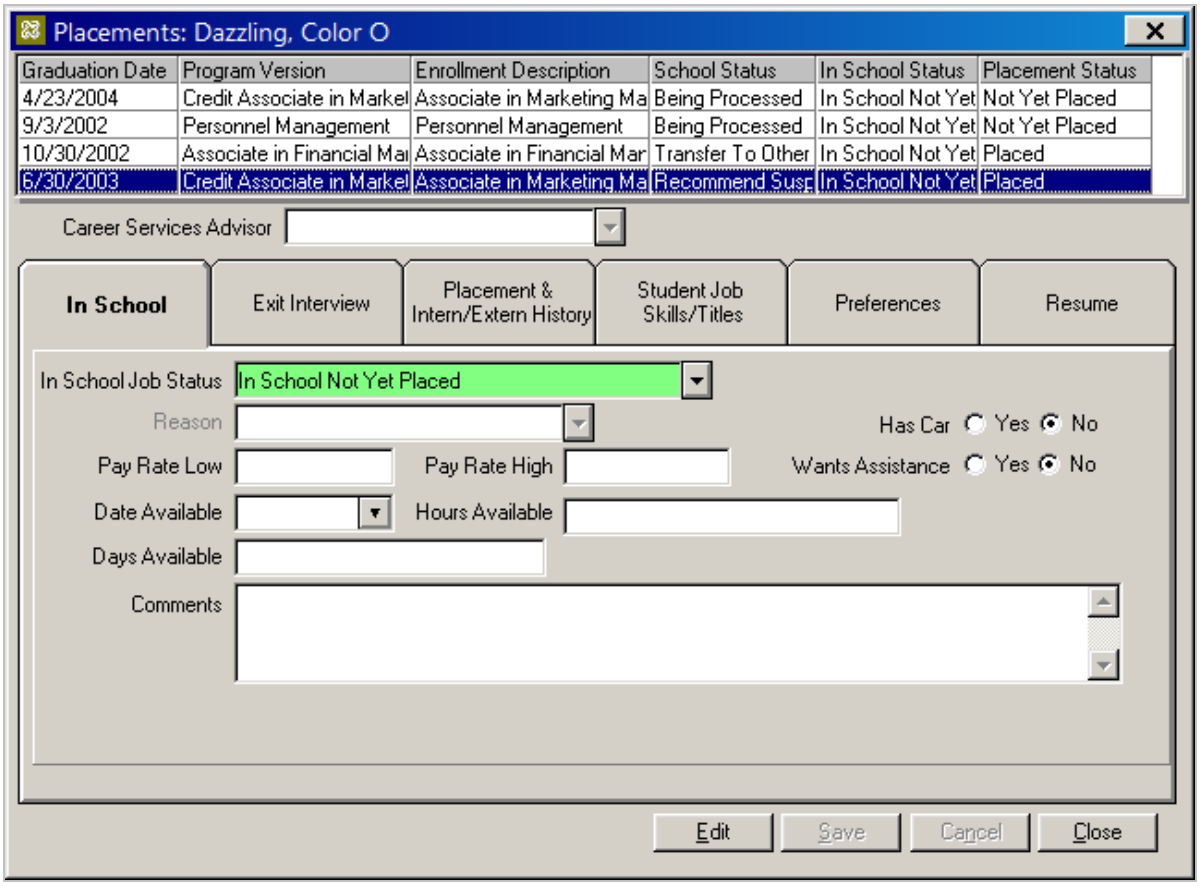
Use the Student Placements feature to record and view placement data for each student enrollment. A placement master record is created for each new student enrollment. Because a student can have more than one enrollment, a student can have more than one placement.

The Contact Manager is helpful in the Placement module to keep track of Career Services Office / Employer / Student interactions such as appointments, telephone conversations, and so on.

The grid displays all enrollments for the student including: Graduation Date, Program Version, Enrollment Description, School Status, In School Status, and Placement Status.

To work with student placements:

1. Select a student.
2. Navigate to **View** > **Career Services** > **Placements**. The Placements form is displayed.



The following fields are displayed in the top section of the form.

Field Descriptions

Field	Description
Graduation Date	Read-only. Indicates the student's graduation date.

Field	Description
Program Version	Read-only. Indicates the student's Program Version.
Enrollment Description	Read-only. Description of the selected enrollment.
School Status	Read-only. Indicates current school status.
In School Status	Display Only. Indicates placement status.
Placement Status	Indicates the current placement status. Click **Edit** to change the student's placement status (to any status other than those tied to **Placed** status). The default is set under **Setup > Career Services**. To see sample student placement statuses for use in the Career Services Department, refer to Status Codes-Setup - Status_Categories. Your institution can develop its own list of placement statuses.
Career Services Advisor	Select the student's Career Services Advisor from the drop-down list. The Career Services Advisor may be selected during the enrollment process if your institution has set up the advisor selection options. See Setup > Academic Records > Enrollment.

3. Continue with the following tabs:

   - In School
   - Exit Interview
   - Placement & Intern/Extern History
   - Student Job Skills/Titles
   - Preferences
   - Resume

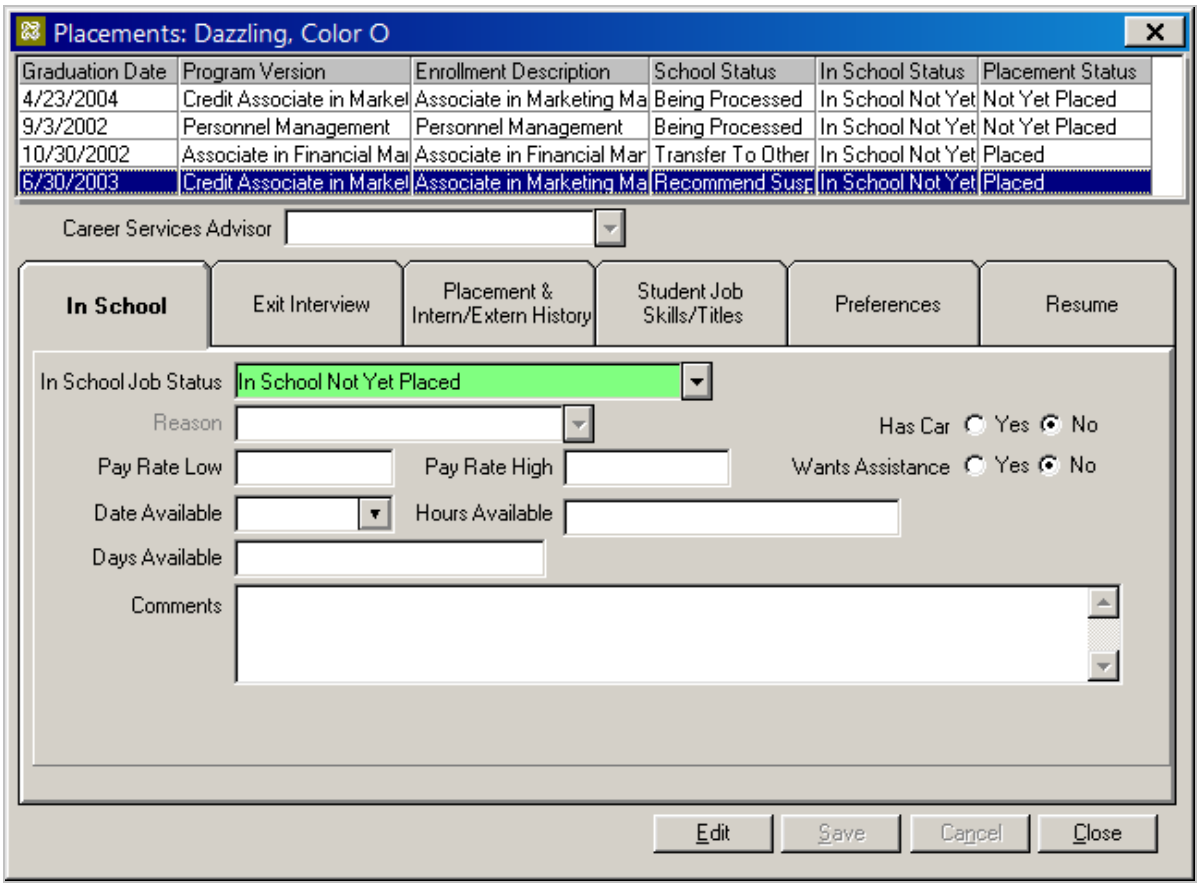
In School

The In School tab of the Placements form tracks the part time placements of students who are still in school. This must be tracked separately from graduate placements which are tracked for statistical and reporting purposes, such as Title IV funding.

The In School tab includes basic information from the student's current placement. It also indicates the current status of the student with regard to placement for the selected enrollment. Placement detail is kept by enrollment, and the enrollment data that is displayed by default is the one at Graduate or Complete status. If neither exists, the most current enrollment for that student is displayed. A placement master record is created for each new student enrollment.

To edit an In School placement record:

1. Select a student.
2. Navigate to **View** > **Career Services** > **Placements**. The Placements form is displayed.
3. Click the **In School** tab.



4. Edit the fields as needed and click **Save**.

Field Descriptions

Field	Description
In School Job Status	Select a status from the list. To see sample student placement statuses for use in the Career Services Department, refer to Status Codes-Setup - Status_Categories. Your institution can develop its own list of placement statuses.
Reason	Select a reason for changing the student's Placement Status.
Has Car?	Select **Yes** or **No** to indicate if the student has a car available for traveling to and from work.
Pay Rate Low / Pay Rate High	Enter the salary range that the student has agreed to accept from an employer.
Wants Assistance	Select **Yes** or **No** to indicate if the student wants assistance in obtaining employment.
Date Available?	Enter the date that the student is available to begin work.
Hours Available	Enter the hours that the student is available for work. This is an unformatted text box. Type text as required.
Days Available	Enter the days that the student is available for work. This is an unformatted text box. Type text as required.
Comments	Enter comments.

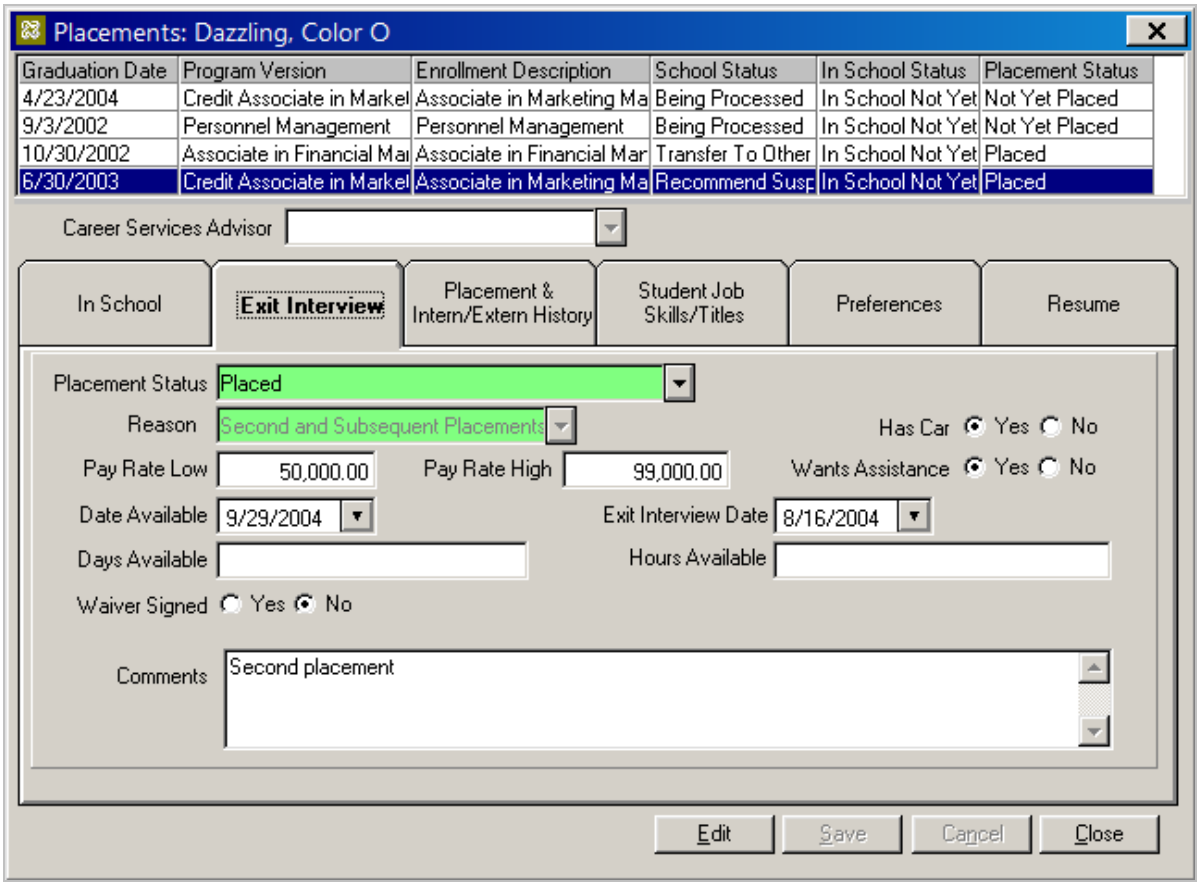
Exit Interview

The Exit Interview tab of the Placements form includes basic information from the student's Placement Exit Interview. It also indicates the current status of the student with regard to placement for the selected enrollment. Placement detail is kept by enrollment. The enrollment data displayed by default is the one at Graduate or Complete status. If neither exists, the most current enrollment for that student is displayed. A placement master record is created for each new student enrollment.

In conjunction with the Automatic Document Scheduler feature, document schedules based on Enrollment are evaluated when the Placement Status for a student is modified and saved on the Exit Interview tab. If the student's data matches the specified criteria for a document schedule where the criteria includes placement status, all documents attached to the document schedule that are not already scheduled are scheduled for the student.

To edit an exit interview record:

1. Select a student.
2. Navigate to **View > Career Services > Placements**. The Placements form is displayed.
3. Click the **Exit Interview** tab.



4. At the top of the form, select the **Enrollment** for which to edit the exit interview.
5. Click on the data entry fields to change the contents. Some fields are read-only and cannot be changed. See the section below for an explanation of the data entry fields.
6. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Field Descriptions

Field	Description
Placement Status	Select a Placement Status from the drop-down list.
Reason	Select a reason for changing the student's Placement Status.
Has Car?	Select **Yes** or **No** to indicate if the student has a car available for traveling to and from work.
Pay Rate Low / Pay Rate High	Enter the salary range that the student has agreed to accept from an employer.
Wants Assistance	Select **Yes** or **No** to indicate if the student wants assistance in obtaining employment.
Date Available?	Enter the date that the student is available to begin work.
Exit Interview Date	Enter the date that the placement exit interview occurred.
Days Available	Enter the days that the student is available for work. This is an unformatted text box. Type text as required.
Hours Available	Enter the hours that the student is available for work. This is an unformatted text box. Type text as required.
Waiver Signed	Select **Yes** or **No** to indicate if the student has signed a waiver of placement assistance from your institution.
Comments	Enter any appropriate comments from the exit interview.

Placement & Intern/Extern History

The Student Placement History page of the Placements Form displays of job placements for the selected student. From this page, you can add a new placement, edit an existing one or assign/view Contact Manager Activities that pertain to this placement.

The form fields vary based on whether the position is an Employment position or Internship/Externship position. The Internship/Externship job placement wizard and the detail form for such a position do not display salary information. The Employment forms display salary information.

Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

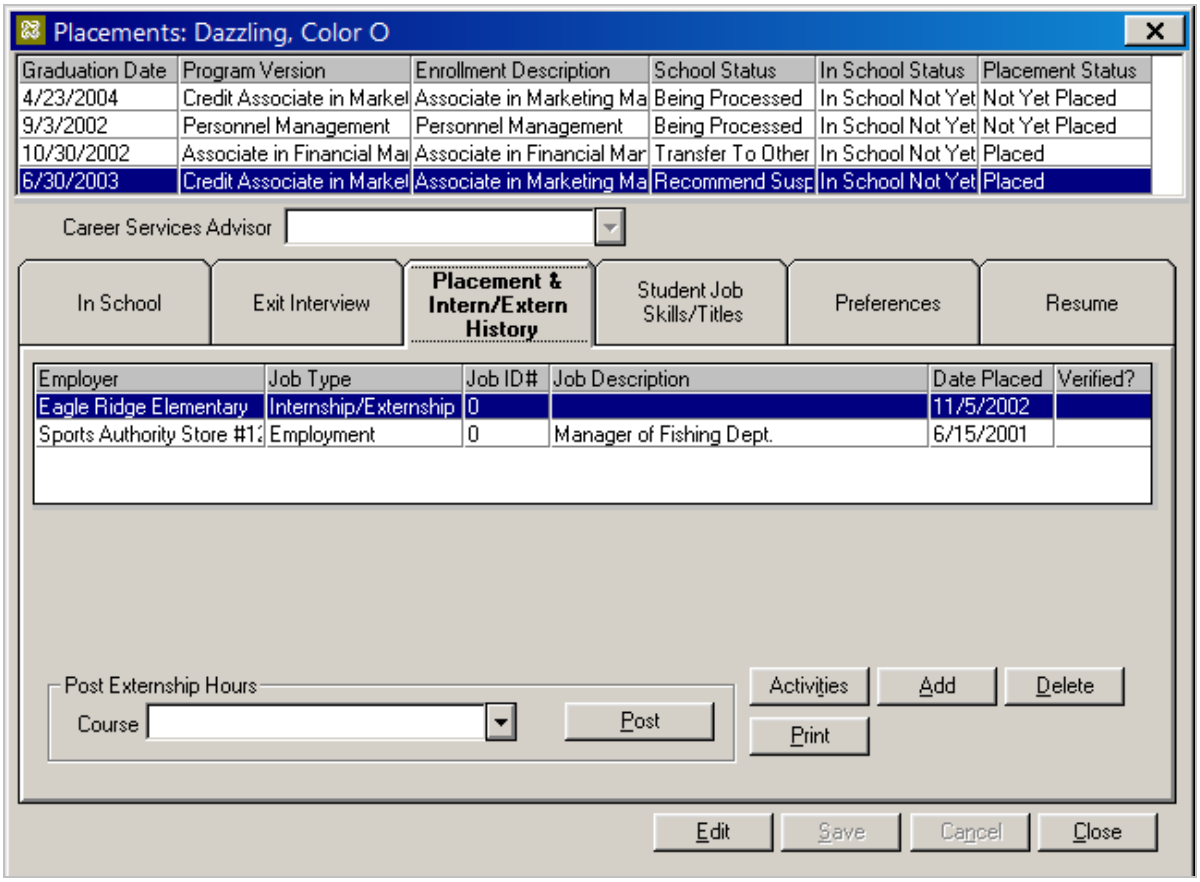
To add/view activities:

Select a placement from the grid and click **Activities**. The Contact History form is displayed. This form has two tabs: Current and Historical.

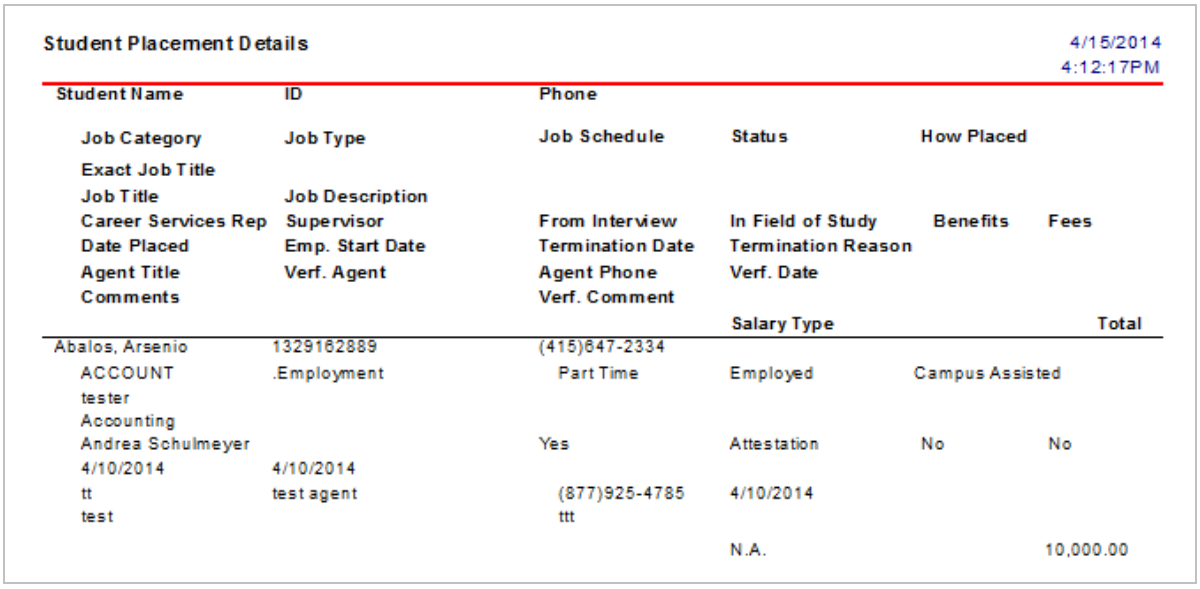
Click **Add** in the **Current** tab to add Contact Manager activities associated with this placement. The **Historical** tab is a read-only record of all Contact Manager activities associated with this placement.

To add a job placement record:

1. Select the student for whom the job placement record is to be added.
2. Navigate to **View > Career Services > Placements**. The Placements form is displayed
3. Click the **Placement & Intern/Extern History** tab. The list of placements for the selected student is displayed. If this is the first placement for the student, the list is empty. A field with student's courses of type Externship allows you to post externship hours.



4. Click **Add** to add a placement to this grid. The Student Placement wizard is displayed.
5. Follow the steps in the topic: Placement Wizard.
6. Select a placement and click **Delete** to remove the placement.
7. Click **Edit** to change information about the selected placement.
8. Click **Print** to view the Report Selection form. Select filtering criteria to generate the Student Placement Details Report.



Student Placement Details 4/15/2014 4:12:17PM

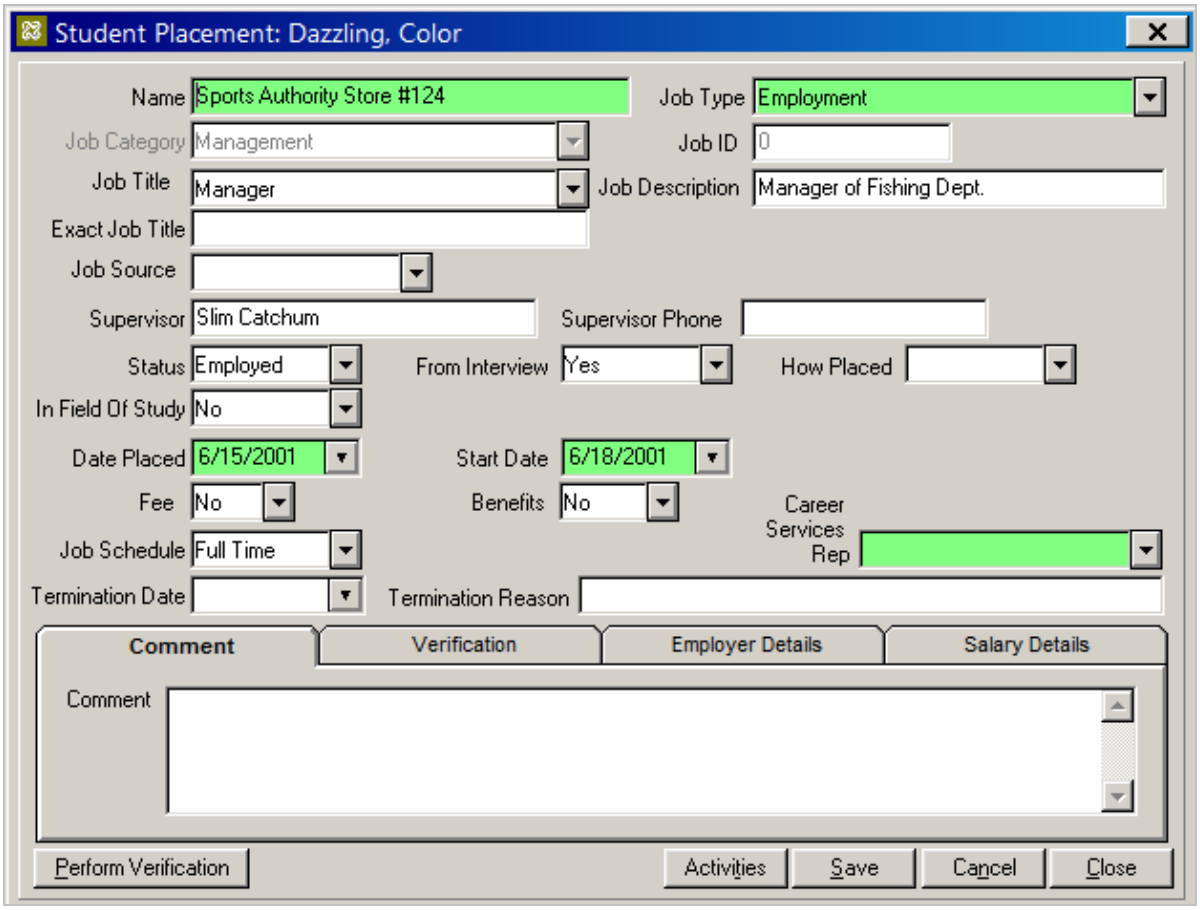
Student Name	ID	Phone			
Job Category	Job Type	Job Schedule	Status	How Placed	
Exact Job Title					
Job Title	Job Description				
Career Services Rep	Supervisor	From Interview	In Field of Study	Benefits	Fees
Date Placed	Emp. Start Date	Termination Date	Termination Reason		
Agent Title	Verf. Agent	Agent Phone	Verf. Date		
Comments		Verf. Comment			
			Salary Type		Total
Abalos, Arsenio	1329162889	(415)647-2334			
ACCOUNT	.Employment	Part Time	Employed	Campus Assisted	
tester					
Accounting					
Andrea Schulmeyer		Yes	Attestation	No	No
4/10/2014	4/10/2014				
tt	test agent	(877)925-4785	4/10/2014		
test		ttt			
			N.A.		10,000.00

9. After you have completed the information for the Student Placement Wizard, you will return to this form where you can **Save** and **Close** to save your changes.

To view or edit a job placement:

1. Select the student for whom the job placement record is to be viewed or edited.
2. Select **View** > **Career Services > Placements**. The Placement form is displayed.
3. Click the **Placements** tab. The list of placements for the selected student is displayed. If the student has not been placed, there will be no items on the list. Refer to the discussion on adding a job placement.

4. Select a job placement from the list and click **Edit**. The Student Placement form is displayed.



Converting an Intern/Externship to a Job

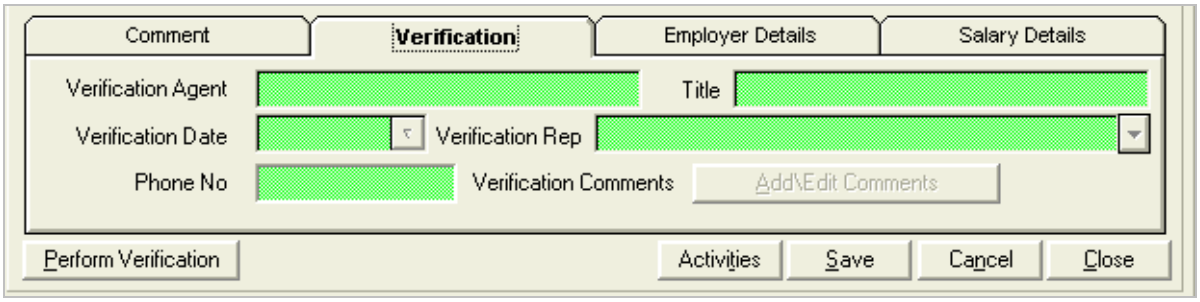
If the placement being edited has a Job Type of 'Internship/Externship', it is possible to convert the job type to 'Employment. When an 'Internship/Externship' job type is edited, a 'Convert to Job' button is displayed. When you click this button, CampusNexus Student prompts for the information required to convert the internship/externship to a full time employment status. The Student Placement wizard requests information (Verification, Employer Details, and Salary Details) in the same manner as if a new placement was being entered; however, the existing employer information is retained. After the process is complete, a new line entry appears under the Placement & Intern/Extern History tab.

Comment Tab

Enter any comments that are relevant to this student placement. CampusNexus Student inserts the job description from the Available Job listing.

Verification Tab

Click **Perform Verification** to enable the Verification tab. If the Verification Date is null, CampusNexus Student displays the **Perform Verification** button. Otherwise, the Perform Verification button is not available. If the verification information is already complete (the Verification Date is not null), the fields are available for editing.



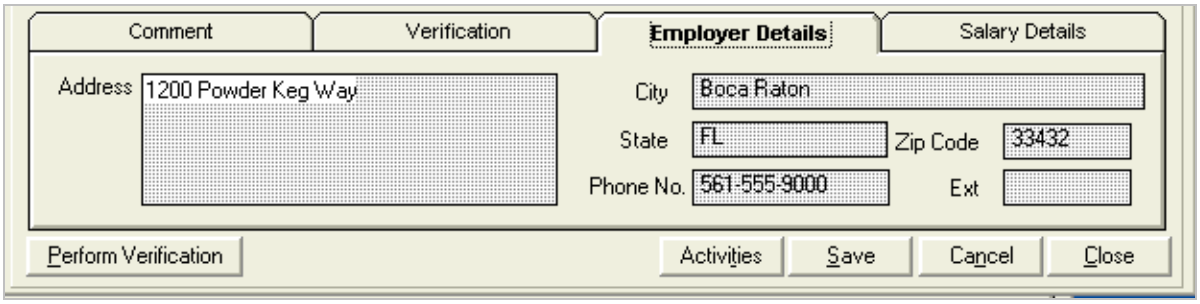
CampusNexus Student provides a message if one or more of the verification fields is empty or null: "*All verification fields must be completed to save changes when the verification date is populated.*" Once you save the verification data, the "Perform Verification" button is removed. If the "Perform Verification" selection was not made while you are editing the form, CampusNexus Student does not validate the verification fields.

Field Descriptions

Field	Description
Verification Agent	Required. Enter the name of the person who verified that the student has started the job.
Title	Required. Enter the title of the Verification Agent.
Verification Date	Required. Enter the date that the verification was performed. This date defaults to today's date when you click the Perform Verification button. You can edit the date if necessary.
Verification Rep	Required. Select the school staff person who verified the student's employment. By default CampusNexus Student displays the person who is logged in if that person is a member of the Placement Rep group.
Phone Number	Required. Enter the telephone number of the Verification Agent. This field is defaulted to the Employer telephone number when you click the Perform Verification button.
Verification Comments	Required. Click Add/Edit Comments. Enter any comments concerning the verification. The Verification Comment must be populated to save the verification data.

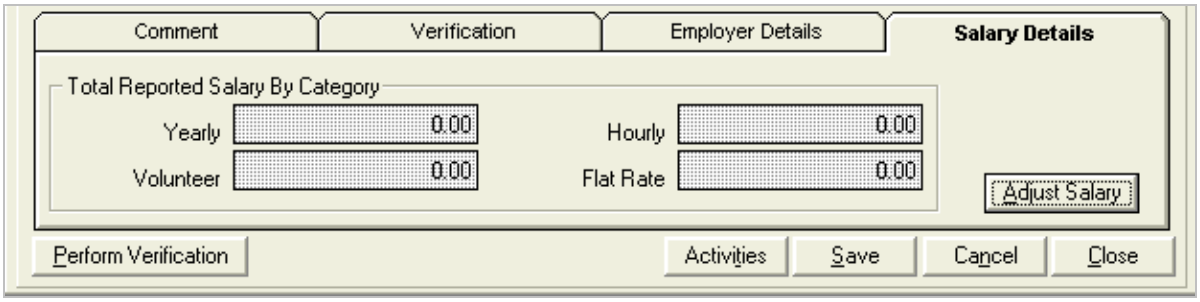
Employer Details Tab

This tab displays read-only employer address information.



Salary Details Tab

This tab displays read-only information about the job salary. Click **Adjust Salary** to edit this information.

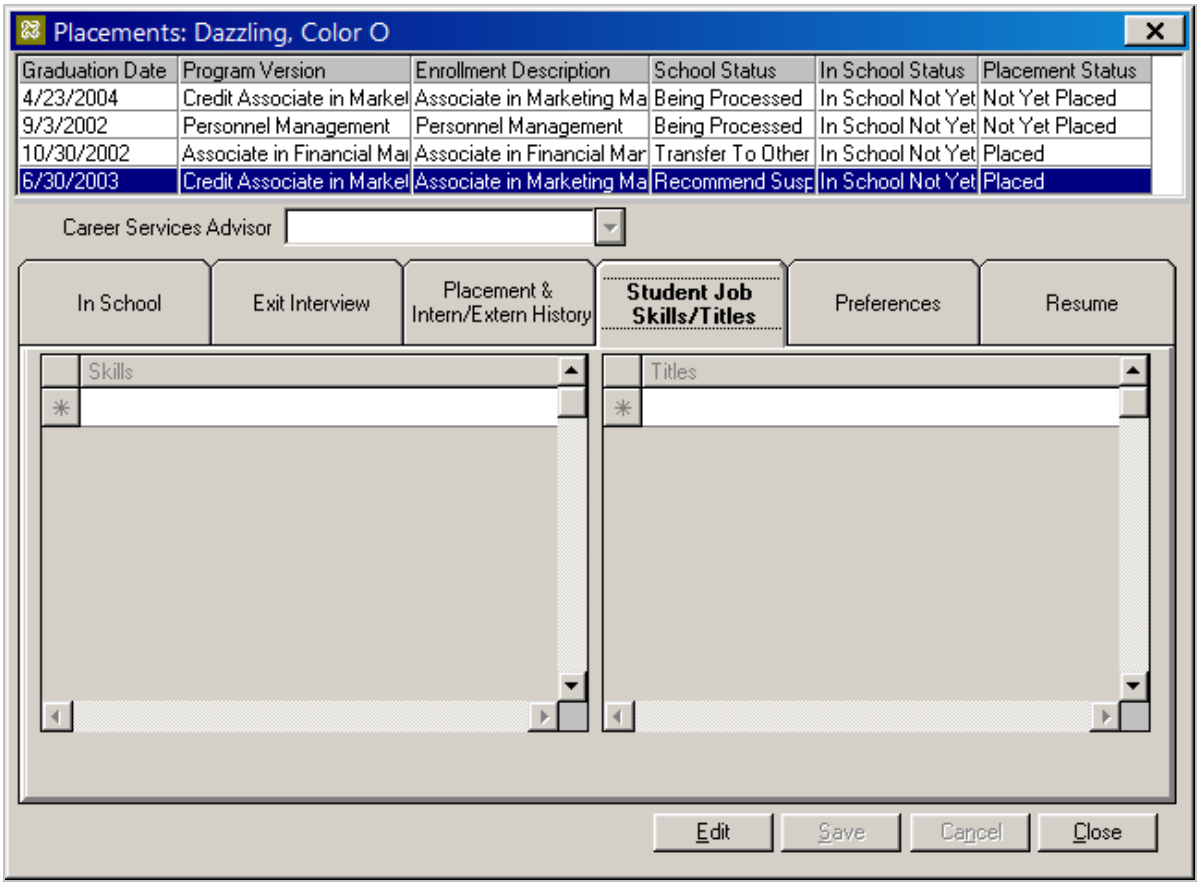

Comment
Verification
Employer Details
Salary Details
Total Reported Salary By Category
Yearly
0.00
Hourly
0.00
Volunteer
0.00
Flat Rate
0.00
Adjust Salary
Perform Verification
Activities
Save
Cancel
Close

Student Job Skills/Titles

The Student Job Skills form is used to select skills that apply to the selected student from a previously defined list of skills. These skills are used to manually match up qualified students with available jobs.

To select a list of special skills and job titles that apply to the selected student:

1. Select a student.
2. Navigate to **View > Career Services**. The Placements form is displayed.
3. Click the **Student Job Skills/Titles** tab. The skills and titles for the selected student are displayed.



4. Click **Edit** to add a skill or job title to the list, then click the field where you want to add a skill or title. Select the item from the drop-down list.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

To delete a skill or title from the list:

1. On the **Student Job Skills/Job Titles** tab of the Placements form, click **Edit** to modify the list.
2. Click the arrow button to the left of the skill or title to be deleted.
3. When the item to be deleted is highlighted, press the **Delete** key.

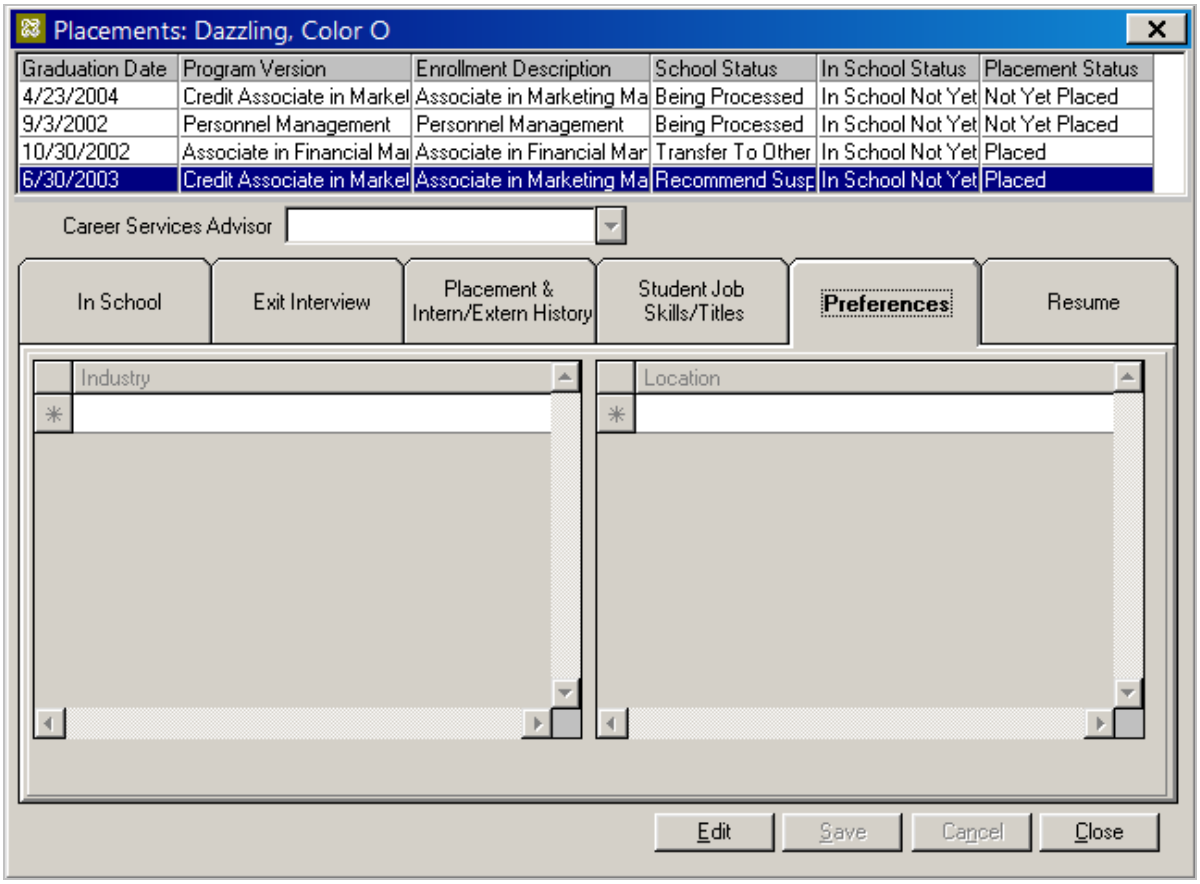
4. CampusNexus Student displays a confirmation message. Click **Yes** to delete the item from the list.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Placement Preferences

The Preferences tab is used to indicate a preferred industry and location for a student.

To designate preferences that apply to the selected student:

1. Select the student for whom the preferences are to be added.
2. Navigate to **View** > **Career Services> Placements**. The Placements form is displayed.
3. Click the **Preferences** tab to view the list of preferred industries and locations (if any) for the selected student.



4. Click **Edit** to add a new preference to the list, then click the field where you want to add a preference. Select the preference from the drop-down menu.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

To delete a preference from the list:

1. With the **Preferences** tab on the **Placements** form active, click **Edit** to modify the list.
2. Click the arrow button to the left of the item to be deleted.
3. When the item to be deleted is highlighted, press the **Delete** key.
4. CampusNexus Student displays a confirmation message. Click **Yes** to delete the item from the list.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Resume

The Resume tab is used to store electronic copies of the student's resume and if desired, one other document. The other document is typically a work sample, drawing, or some other presentation to demonstrate the student's proficiency in a particular field. Students can upload their documents to this page from Portal > My Career > My Resume.

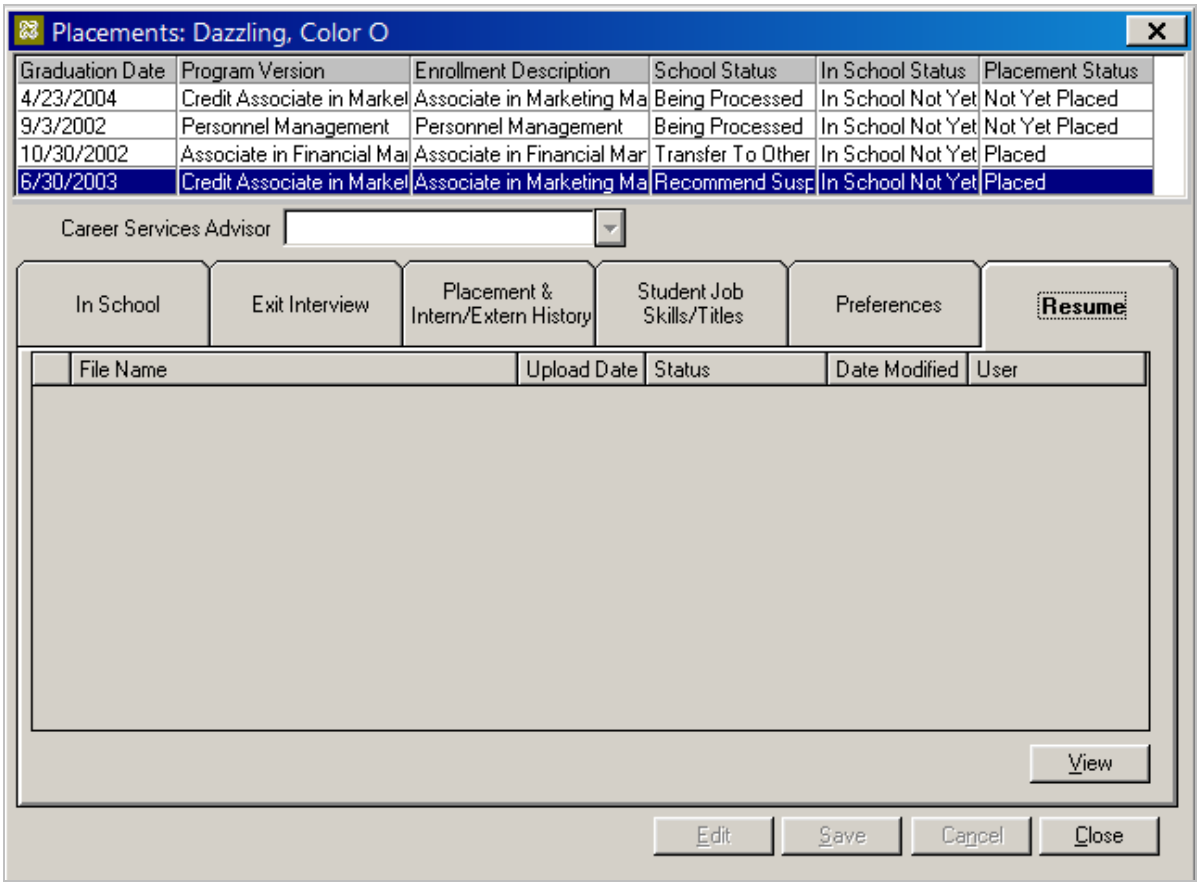
Note: ImageNow must be installed and running to view resumes on file. See Display Document for further information regarding ImageNow (View > Contact Manager > Documents).

Authorized staff members receive documents and allow viewing in View > Contact Manager > Documents > Document Tracking.

The system supports only one resume. If the student wishes to add an updated resume, the system over-writes the old one and replaces it with the new one. In this way, only the most current student resume is accessed.

To access a student's resume:

1. Navigate to **View > Career Services > Placements**. The Placements form is displayed.
2. Click **Resume**. CampusNexus Student displays the student-determined File Name, Upload Date (when uploaded by student), Status (when introduced into the system and approved, if required,by staff), Date Modified (Over-written with a later version by the student) and the User (staff member).



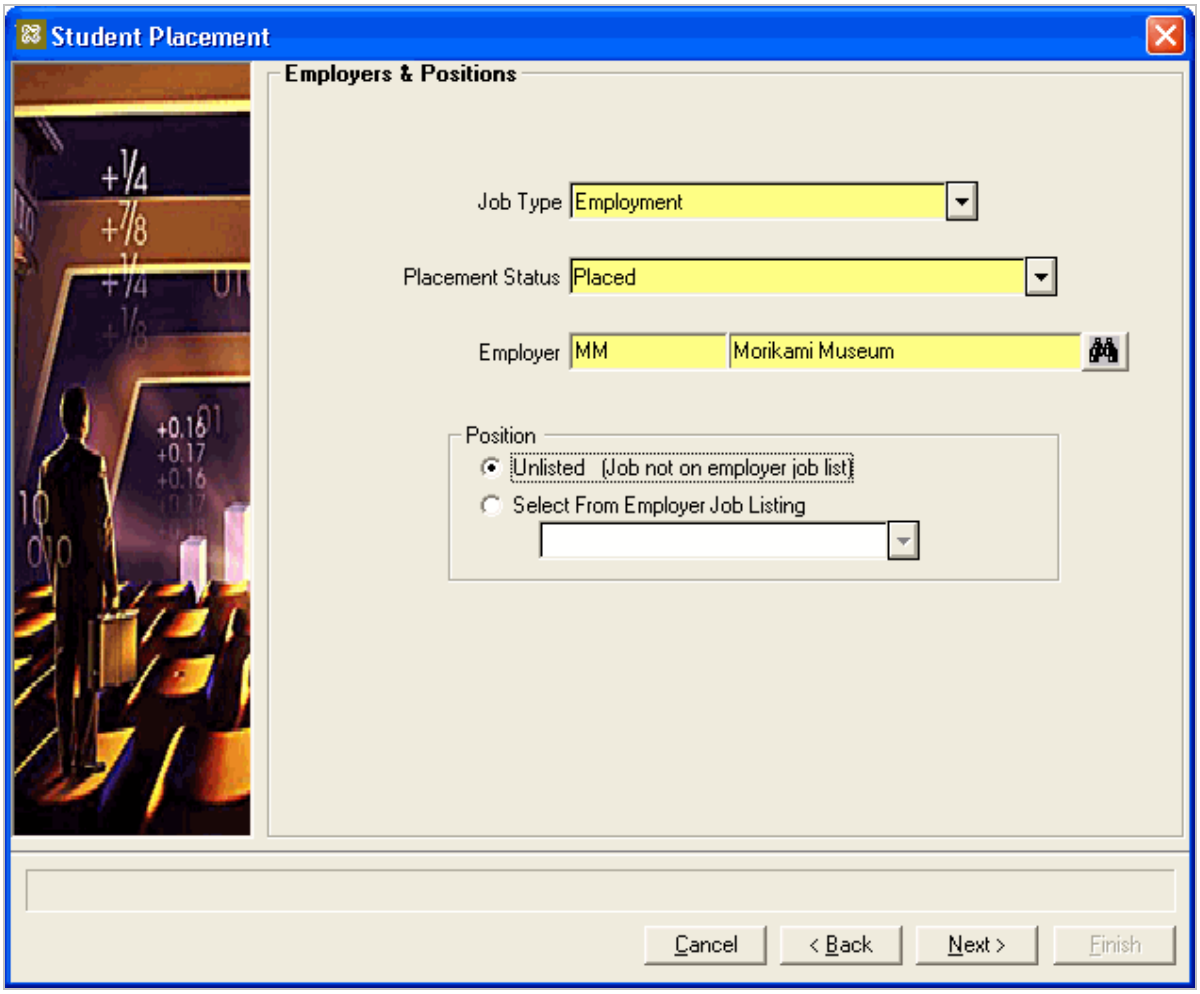
3. Select a document in the grid and click **View**.
4. Click **Close** to close the form.

Placement Wizard

When you are ready to place a student in an available job, a wizard guides you through the steps.

To place a student in an available job:

1. Select the student for whom the job placement record is to be added.
2. Navigate to **View > Career Services > Placements > Placement & Intern/Extern History** (tab). The Student Placement form displays placements for the selected student
3. Click **Add** to launch the Student Placement wizard. The Employers & Positions form is displayed.
4. Select the **Job Type**, **Employer**, and the **Job** in which the student has been placed. Click **Next**.

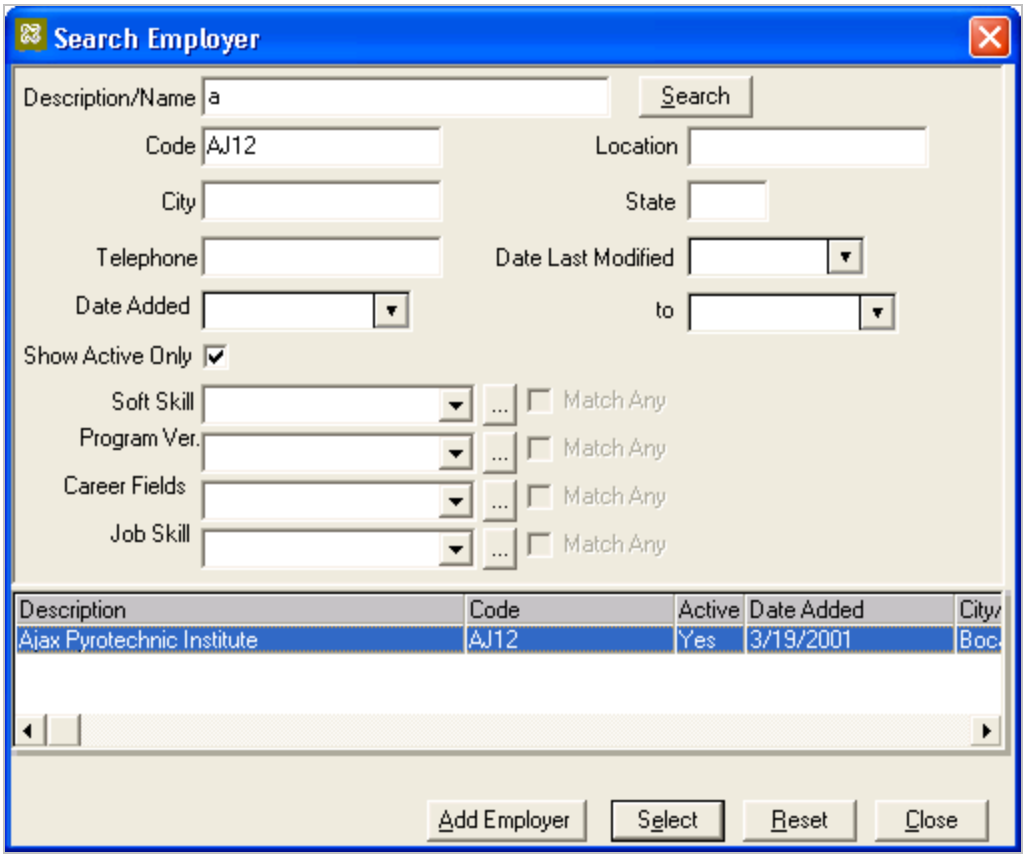


Note: When you add a new placement, click **Search Employers** to shorten the list of employers displayed when you click the Employer list. Enter a value for which CampusNexus Student can search. CampusNexus Student populates the list with only those employers that match your search value. CampusNexus Student compares your search value with the employer name, code, city, and state. If only one employer matches, CampusNexus Student selects the record and fills in the code and description.

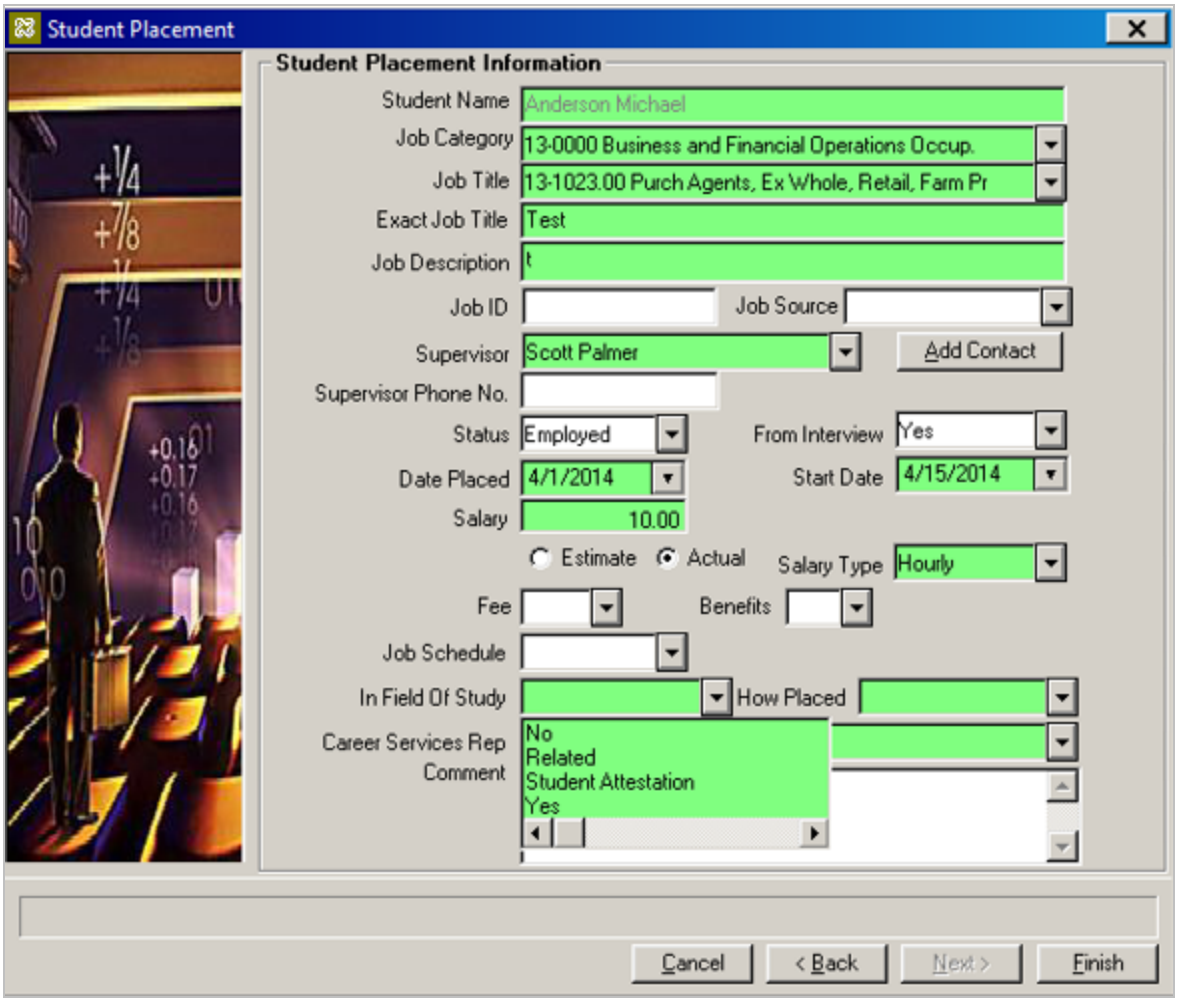
Add New Employers

5. Click **Add Employer** to enable the Employer form. In this form, enter information about a new employer, and add

that employer to your database.



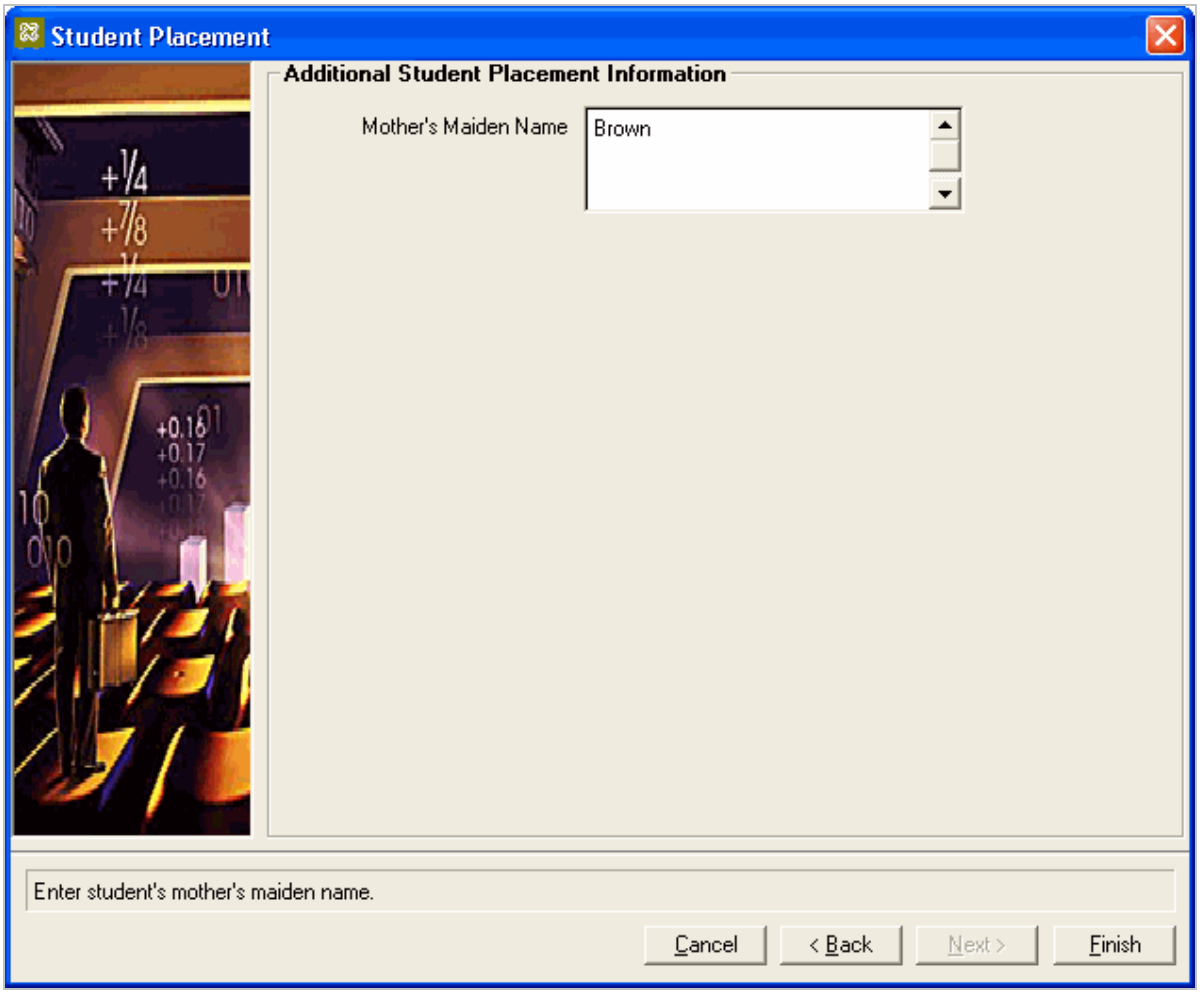
6. Enter the details about the job placement. Refer to the Descriptions of Fields on the Student Placement Information Form. Click **Next**.



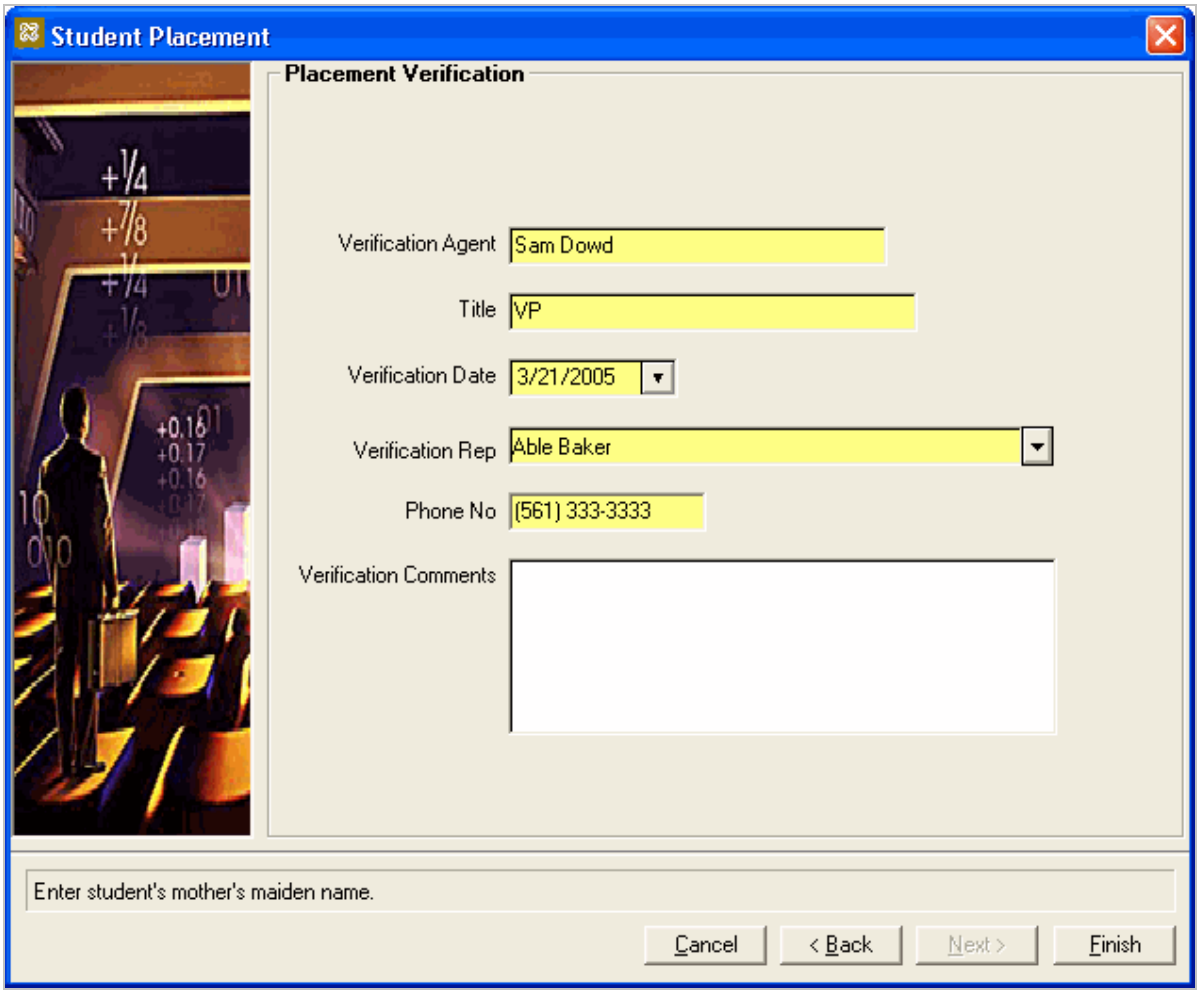
7. Enter the remaining details about the job placement. The comments box contains the job description. Add any additional comments that are required.

   Note: If your campus has customized the Student Placement Wizard with school-defined fields or has enabled placement verification, the Next button is enabled and you can view an additional wizard form by clicking **Next**.

8. The optional **School Defined Fields** form is displayed if your campus has that feature enabled. Enter the information as required.



9. The optional **Placement Verification** form is displayed if your campus has enabled that feature in the **Lists > Career Services > Job Type** settings. Enter the information as required.



10. Click **Finish**.
11. Click **OK** on the confirmation message.

Fields Descriptions: Employer & Positions Form

Field	Description
Job Type	The type of job is a required field that is selected from a drop-down list. This list is set up on the **Lists** > **Career Services** > **Job Type** form.
Placement Status	The placement status is selected from a drop-down list of placement status codes. This list is set up on the **Lists** > **Career Services** > **Status Codes** form.
Employer	You can enter the employer information, or click the Search button to find the employer.
Position Fields	• Unlisted (Job not on employer job list) - Enable the **Unlisted** option if the position is not listed on the employer's job list. • Select from Employee Listing - Enable the **Select from Employee Listing** option if the position is already posted on the employer's job list. This allows you to select it from the drop-down list of jobs.

Field Descriptions: Student Placement Information Form

Field	Description
Student Name	The name of the student being placed.
Job Category	Select a job category from the list. Multiple selections can be associated with Job Titles. You cannot select a Job Category for a campus where you do not have authorization. After making a selection, CampusNexus Student fills the Job Title associated with the select Job Category.
Job Title	Select the title of the job from the list.
Exact Job Title	Enter the exact job title.
Job Description	Enter a description of the job.
Job ID	This number is generated automatically.
Job Source	How was the student placed in this job? The choices are by the college, by the student (without college assistance), or Continuing Ed. Continuing Education refers to those students who are continuing their education even though they are employed with or without employment assistance from your school.
Supervisor	Enter the name of the supervisor for this position.
Supervisor Phone Number	Enter the name of the supervisor's phone number
Status	Select the status of the placement: **Employed** or **Terminated**.
From Interview	Was the job acquired from the interview set up by the school with the employer? Select **Yes** or **No**.
Date Placed	Enter the date the student is being placed, or select it from the calendar tool.
Start Date	Enter the date the student starts the job, or select it from the calendar tool.
Current	Is the student currently holding the job? Select **Yes** or **No**.
End Date	Enter the date the job ends, or select it from the calendar tool.
Salary	Enter the salary amount in dollars.
Salary Category	Enter the salary or wage rate accepted by the student for this job. Use the radio buttons to indicate if this is actual or estimated.
Salary Type	Select a user-defined Salary Type from the drop-down list.
Fee	If a fee is associated with this placement, select **Yes** from the list.
Benefits	Are employee benefits such as vacation, insurance, holidays, retirement plan, and so on included with this job offer? Enter **Yes** if this is so.
Job Schedule	Select Full time or Part time.
From / To	Specify the job hours.

Field	Description
In Field of Study	Was this job in the student's field of study? Select **Yes**, **No**, **Related** or **Student Attestation**. **Note**: Students can be placed through the option, 'Student Attestation', which treats their placement the same as 'placed in a related field' or 'placed in field', yet distinguishes them so that accurate placement in the system can be demonstrated. Placement audits reflect this choice when options are edited in the forms. For example, the Placement Stats by Field Of Study cube report includes Student Attestation, and when Student Attestation is chosen as the option, the placement percentage behaves the same as using 'placed in a related field' for its reports. On creating a new placement record, if both the system level and Attestation switches are 'On', Student Attestation is displayed as one of the items on the In Field of Study combo box; if either of the switches is 'Off', the combo box will become invisible and disabled. But, when editing an existing placement record, regardless of the value of the switches, the In Field of Study combo box will show whatever the value for that student is. If it has Student Attestation, it will show as that regardless of the value of the switches.
How Placed	Select the method of placement from the How Placed drop-down list.
Career Services Rep	Select the Career Services Representative from the Career Services Rep drop-down list.
Comment	Type any comments related to this placement into the Comment field.

Field Descriptions: Placement Verification Form

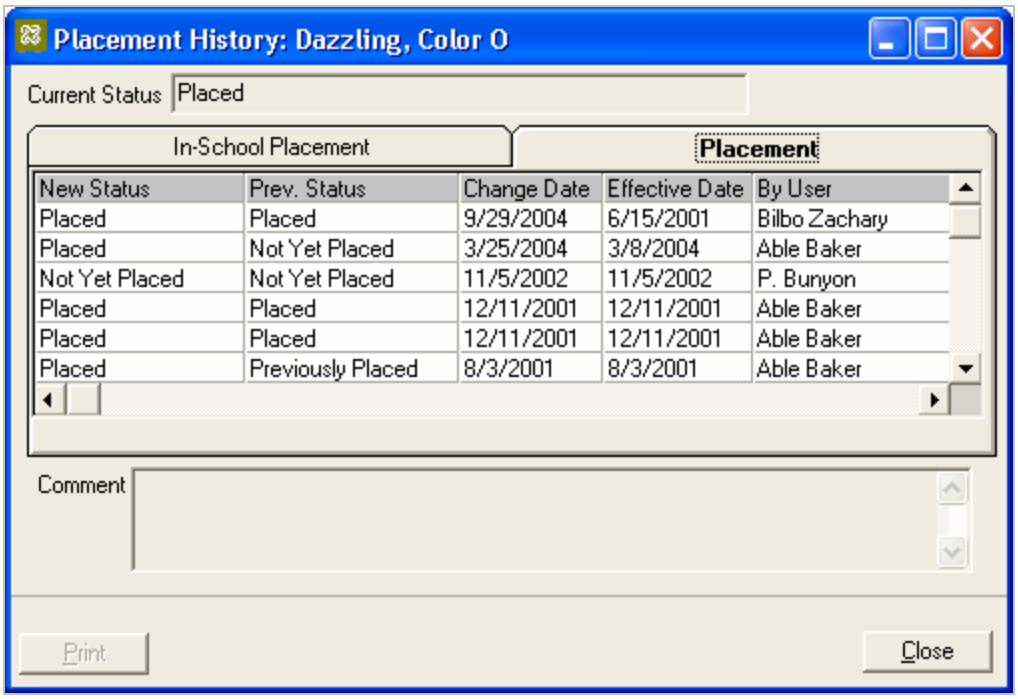
Field	Description
Verification Agent	Enter the name of the verification agent.
Title	Enter the title of the verification agent.
Verification Date	Enter the date of verification.
Verification Rep	Enter the name of the verification representative.
Phone Number	Enter the phone number of the verification representative.
Verification Comments	Enter any comments related to verification.

Placement Status History

The Placement Status History form provides tracking documentation for change-of-status events in the student's placement sequence. In Placement Setup, your school selects an initial Placement Status for students that have not yet been placed. Once a placement action changes that status, a record is kept for each change.

Certain placement status codes are provided and required when CampusNexus Student is installed. Your school may wish to add other placement status codes using the Setup > Status Codes procedures.

When you select the **View > Career Services > Status History** menu option, CampusNexus Student displays a Placement History form similar to the one below. This is a read-only form.

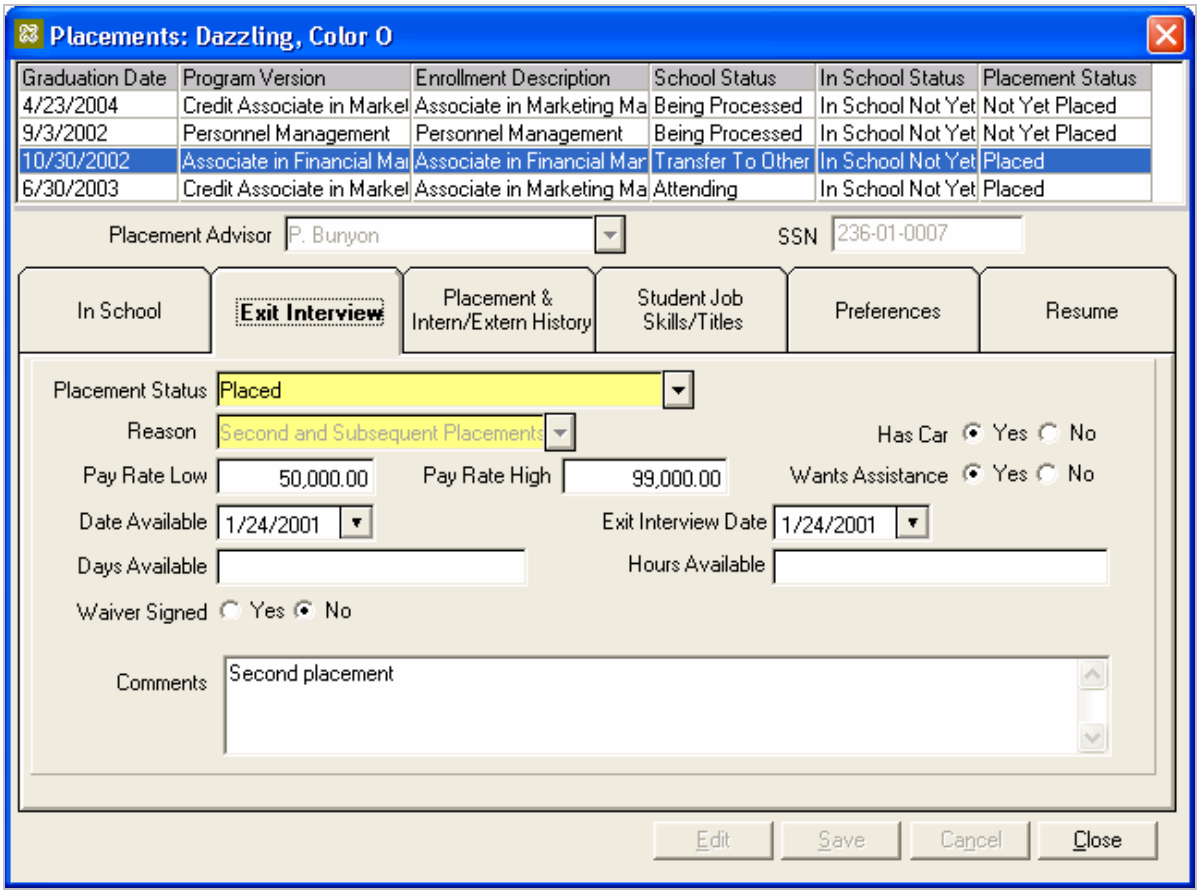


The form shows the student's **Current Status** at the top of the form. The grid displays the following data:

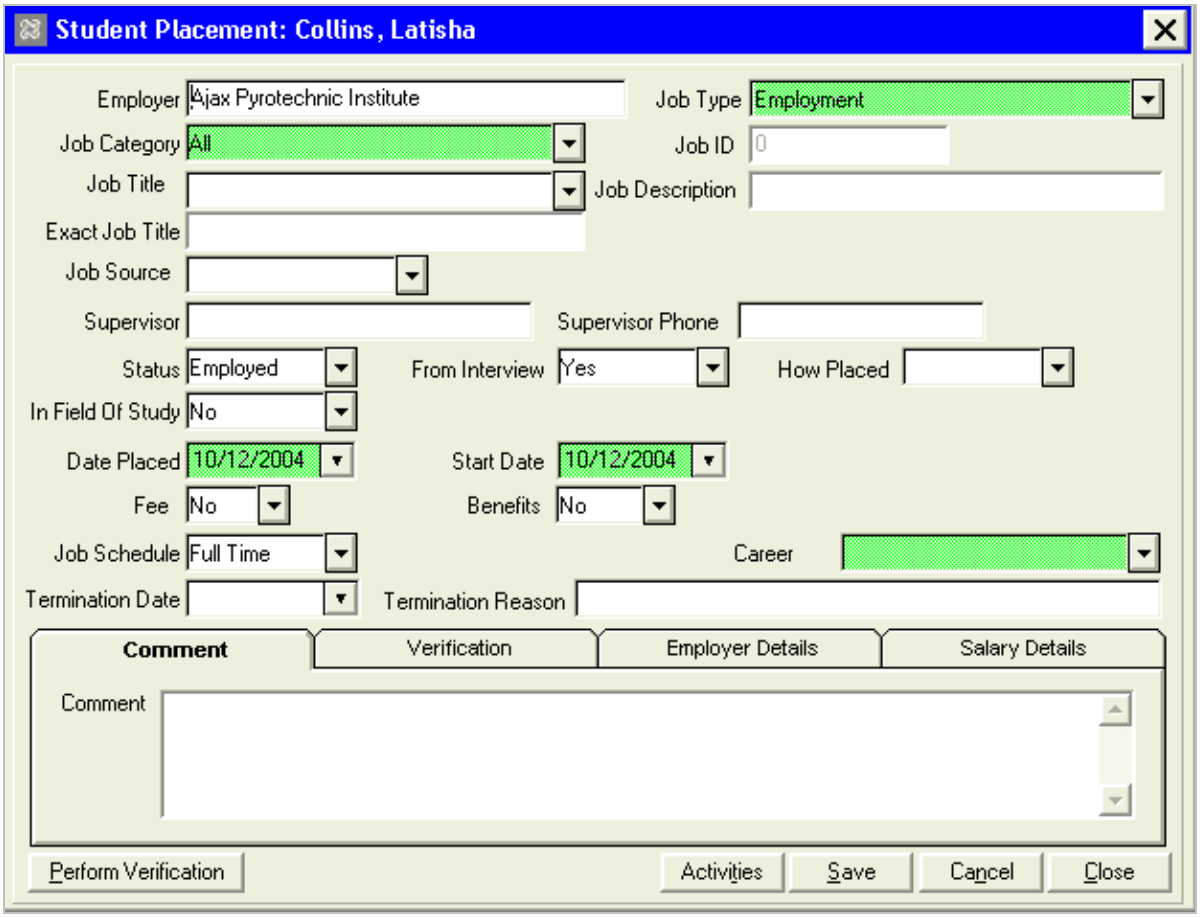
- **New Status**: The status to which the student was changed.
- **Previous Status**: The status from which the student was changed.
- **Change Date**: The current system date when the change was made.
- **Effective Date**: The date on which the change is effective.
- **By User**: The user who entered the change.
- **Reason**: (Shown below the grid.) Click a row on the grid to see system-generated reasons related to the status change. Users do not enter these reasons.
- **Comments**: (Shown below the grid.) Click a row on the grid to see system-generated comments related to the status change. Users do not enter these comments.

The student's Placement Status is changed on the Exit Interview tab of the Placements form.

The Placements form below illustrates the **Exit Interview** page on which the **Placement Status** appears.



Note: The Placement Status History is different from the **Employment Status** shown on the Student Placement form. The Student Placement form is reached from **View > Career Services > Placements > Placement & Intern/Extern History >** Add or Edit (See the example below.) Do not confuse the status of a **job placement** (Employed or Terminated) with **Placement Status**. Employment Status does not appear on the Placement History form.

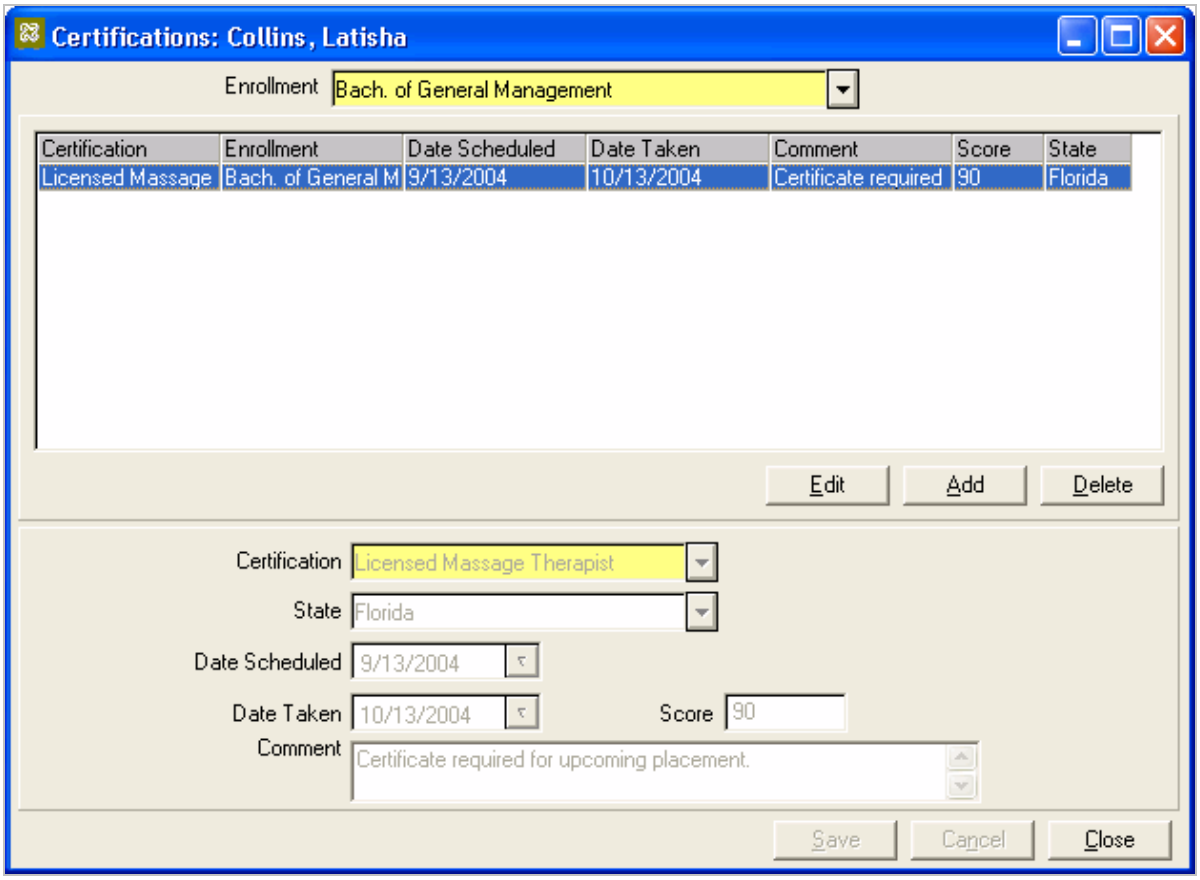

Student Placement: Collins, Latisha
Employer
Ajax Pyrotechnic Institute
Job Type
Employment
Job Category
All
Job ID
0
Job Title
Job Description
Exact Job Title
Job Source
Supervisor
Supervisor Phone
Status
Employed
From Interview
Yes
How Placed
In Field Of Study
No
Date Placed
10/12/2004
Start Date
10/12/2004
Fee
No
Benefits
No
Job Schedule
Full Time
Career
Termination Date
Termination Reason
Comment
Verification
Employer Details
Salary Details
Comment
Perform Verification
Activities
Save
Cancel
Close

Certifications

The Certifications feature permits you to view or modify information about a student's certifications.

To view or edit certifications for a student:

1. Select a student..
2. Navigate to **View > Career Services > Certifications**. If the student has any certifications, they are displayed in the form.



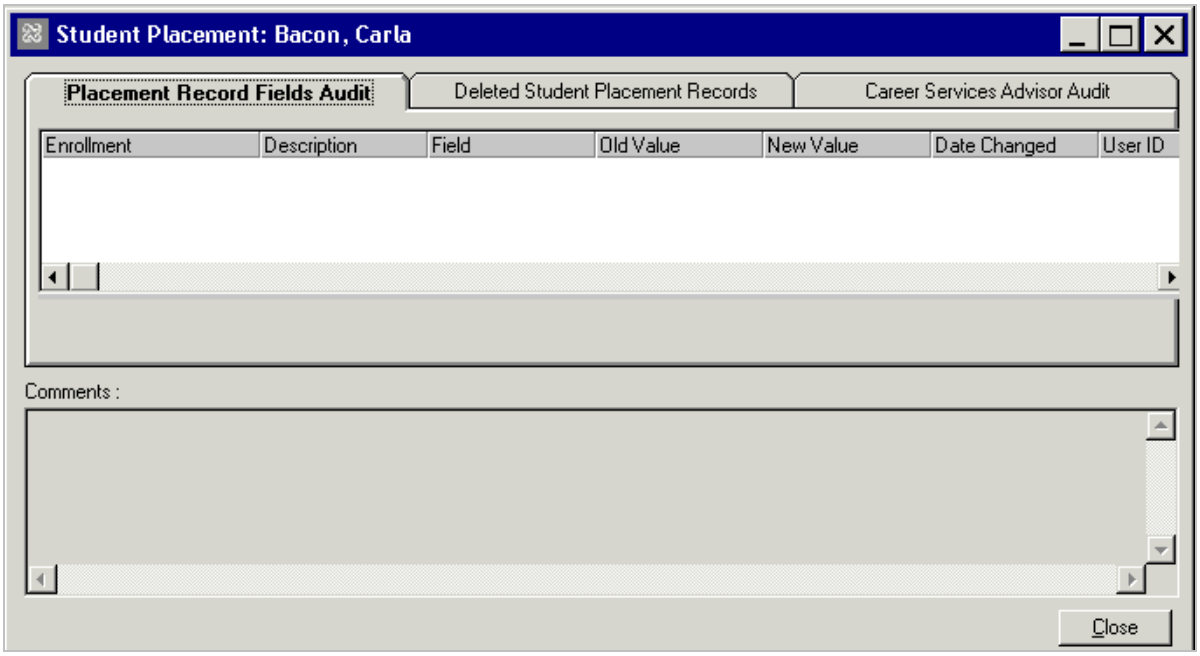
3. Click **Add**, or select a record and click **Edit**. Enter or select appropriate certificate information.
4. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Placement Audit

The Placement Audit feature tracks any updates or deletions made to a student placement record. It does not enter a record for the initial entry of the placement record; it records only changes.

To view the Placement Audit record:

1. Select the student whose placement record you want to view.
2. Navigate to **View > Career Services > Audit**. Data is displayed for the selected student's placement record.



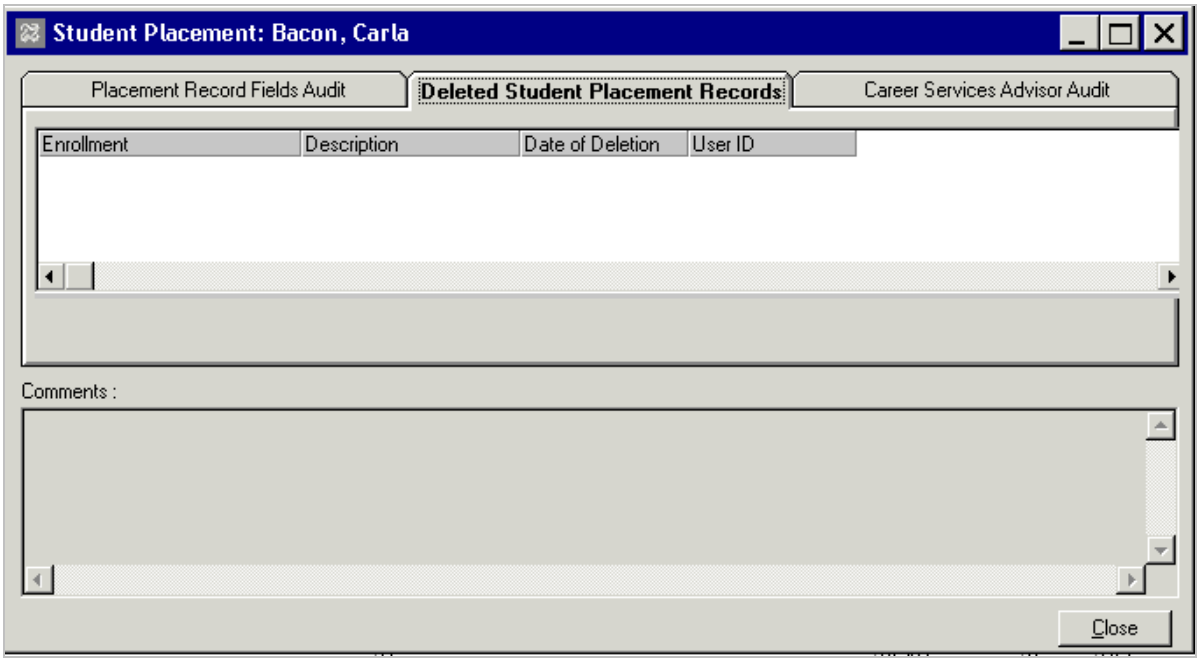
Each tab on the Placement Audit form displays different data for the selected student. The information cannot be modified on this form.

Placement Record Fields Audit tab

This tab (pictured above) displays modifications to placement record fields such as salary information.

Deleted Student Placement Records tab

This tab displays any deleted placement records for the student.



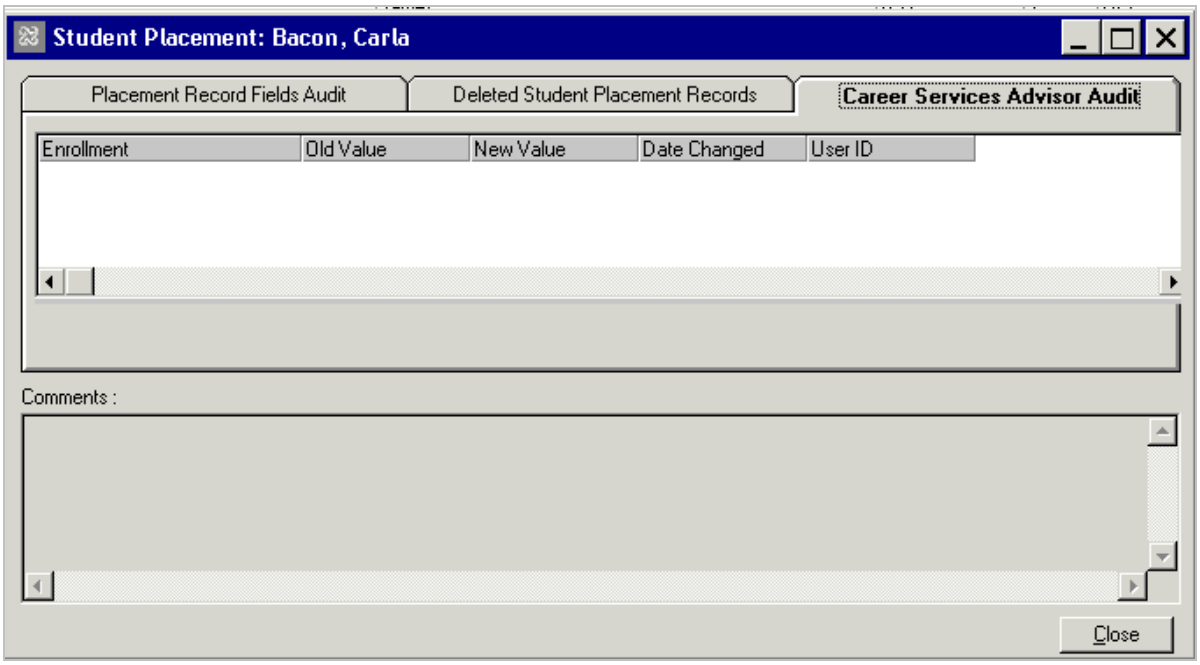
When deleting a placement record, the student's placement status reverts to the default not placed status, unless there is another placement record associated with the student.

When deleting a placement record, if the placement was linked to a job with a filled status, you have the option of reverting the job to an available status if today's date is still within the available date range. The number filled for this job will decrease by one, and the openings field will increase by one. If you choose to not revert the job status to available, the data will not be changed.

When a placement record is deleted, the placement history that is associated with the employer is also deleted.

Career Services Advisor Audit tab

This tab displays an entry each time the Career Services Advisor is changed, or edited.



View > Loan Management

Functions related to loan management, loan status history, and school-defined fields are handled via this menu. The options on this menu apply to the student selected from the Recent Students list.

Menu Item	Description
Student	Displays the Student Master form.
Loan Management	Displays a list of the student's loans. You can edit certain items of loan information for the selected student, print an Exit Interview report, and view the student's loan status history.
Loan Status History	Displays the history of loan status changes for the student.
School Fields	Displays the form used to view or enter data in school-defined fields related to the Loan Management module and public fields from other modules.

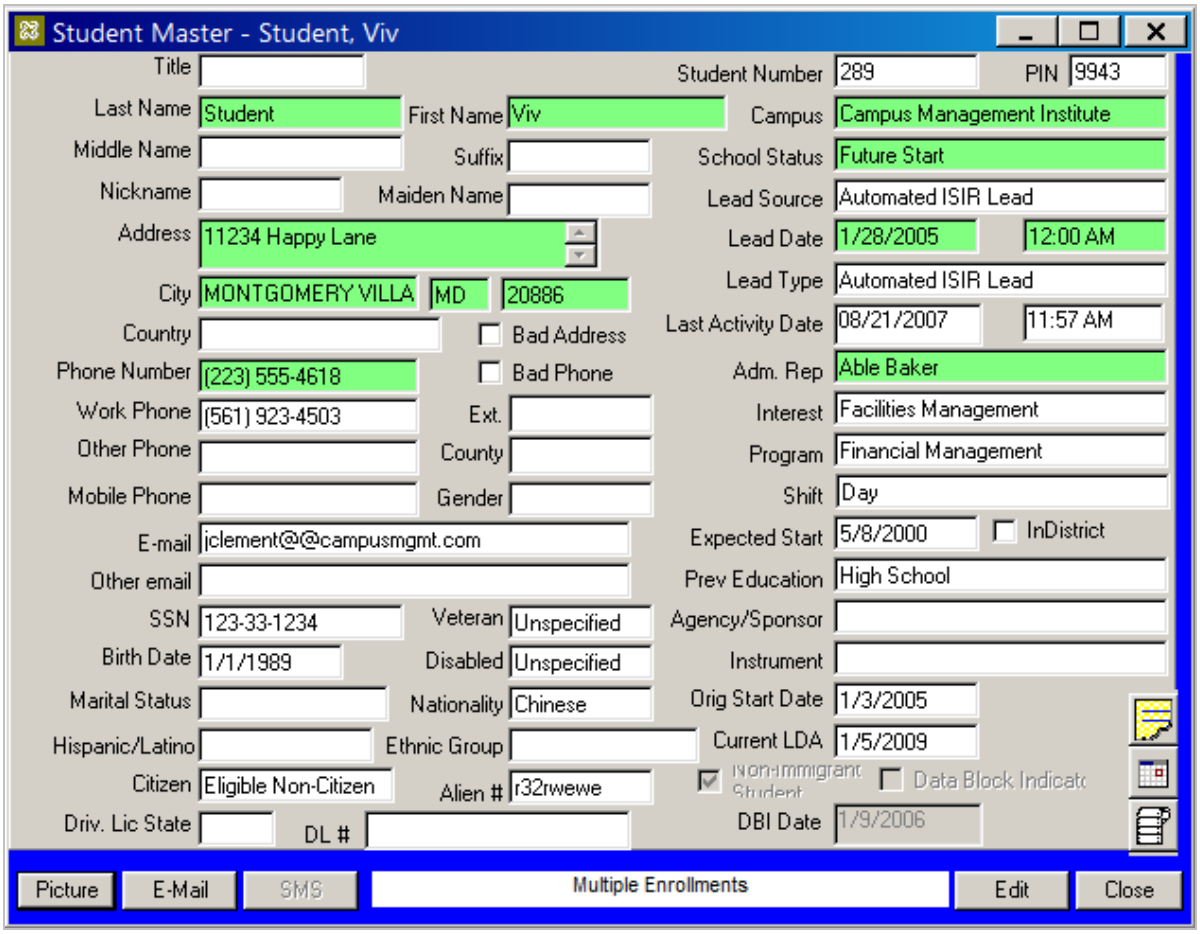
The options on the Student Bar are the same as the options on the View menu, unless the Student Bar has been altered by the user.

Student Master

The Student Master form contains much of a student's basic demographic information. The Student Master form is usually (but not necessarily) populated in the Admissions module by adding a new lead to the database. New leads are entered using the Quick Lead Entry form or the Add New Lead **Ctrl+L** option on the File menu. The **Ctrl+N** key combination can also be used to start a new Student Master record (form) without entering a quick lead.

To view a Student Master form:

1. Select one of the following options:
    - Click **Student** on the Student Bar.
    - Double-click **Recent Students** on the Toolbar. When you change the student in the Recent Students list, a new Student Master form is displayed. If you already have a Student Master form open, it remains open in the background.
    - From the **View** menu navigate as follows:
        - Contact Manager > Student
        - Admissions > Student
        - Financial Aid > Student
        - Student Accounts > Student
        - Academic Records > Student
        - Career Services > Student
        - Loan Management > Student
        - Student Services > Student
        - Housing > Student
    - Use the **Find** menu or click on the Toolbar to search for a student.



Note: The border color around the Student Master form indicates the student's status category. In the setup options under Setup > Status Codes > Colors Tab, your system administrator can choose colors for the status categories.

2. Multiple Student Master forms can be displayed at the same time. The forms always open in the same place in the work area. Unless you have closed, moved, or minimized a previous Student Master form, the next form you open covers the previous form.

   To move between open Student Master forms use the **Window** menu and select **Tile** or **Cascade** to organize all open forms in the work area.

   When you are working with multiple students, ensure that the correct form is current (active). The name of the current student is always shown in the Recent Students text box. The title bar of the active form is always a different color than other forms which may be open in your work area.

3. To edit the information on the form, click **Edit**. See Edit a Student Master.

   Required fields on the form have a background color other than white. If a required field is blank, you must enter data in it when you edit the form, even if you did not intend to provide the information when you clicked Edit.

   Some fields are required by CampusNexus Student (Last Name, First Name, Lead Date, Admissions Rep). Additionally, your institution may designate other fields as required. The system administrator can mark fields as required in either of two ways.

- Open any Student Master (or Quick Lead) form and go to Setup > Required Fields.
- Designate the field as required in the Data Dictionary.

4. To add an activity from the Student Master form, click the **Add Activity** icon at the bottom right of the form. The Activity form is displayed.
5. Click **Close** (Ctrl+F4) to close the active Student Master form. If you are in edit mode when you click Close, you are prompted to save any changes.

Duplicate Student Records

CampusNexus Student checks for duplicate Student Master records when new leads or students are added. The following table columns are used to check for duplicates:

- Student ID
- Social Security Number
- Phone Number
- Date of Birth and Student Name (combined)
- Driver's License Number
- E-mail address.

Each check is performed only if you entered data in the corresponding field. If at least one match is found, a grid showing the matches is displayed

If the lead is a duplicate and can be found on the grid, click the record and the lead form is populated with the information for that lead. The information can then be edited. The campus for the lead can be changed only if the campus ID for the record from the grid is in the list of campuses to which you have access.

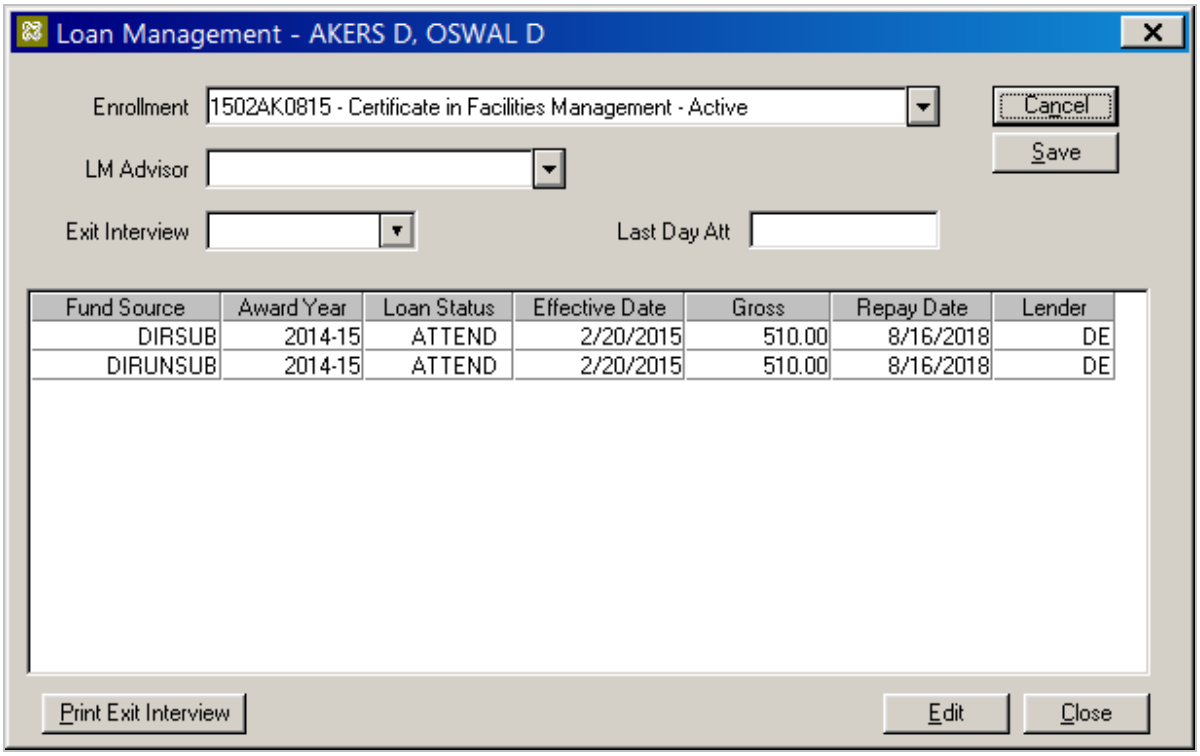
Loan Management

The Loan Management form lists the student's loans. From this form, you can edit certain items of loan information for the selected student, print an Exit Interview report, and view the student's loan status history.

Note: Some fields shown on the Loan Management form are for your information only and are entered by you, the user. These fields include, monthly payment, interest rate, loan balance, number of payments, and so on.

To work with the student's loan management data:

1. Select a student.
2. Navigate to **View** > **Loan Management** > **Loan Management**. The Loan Management form is displayed.

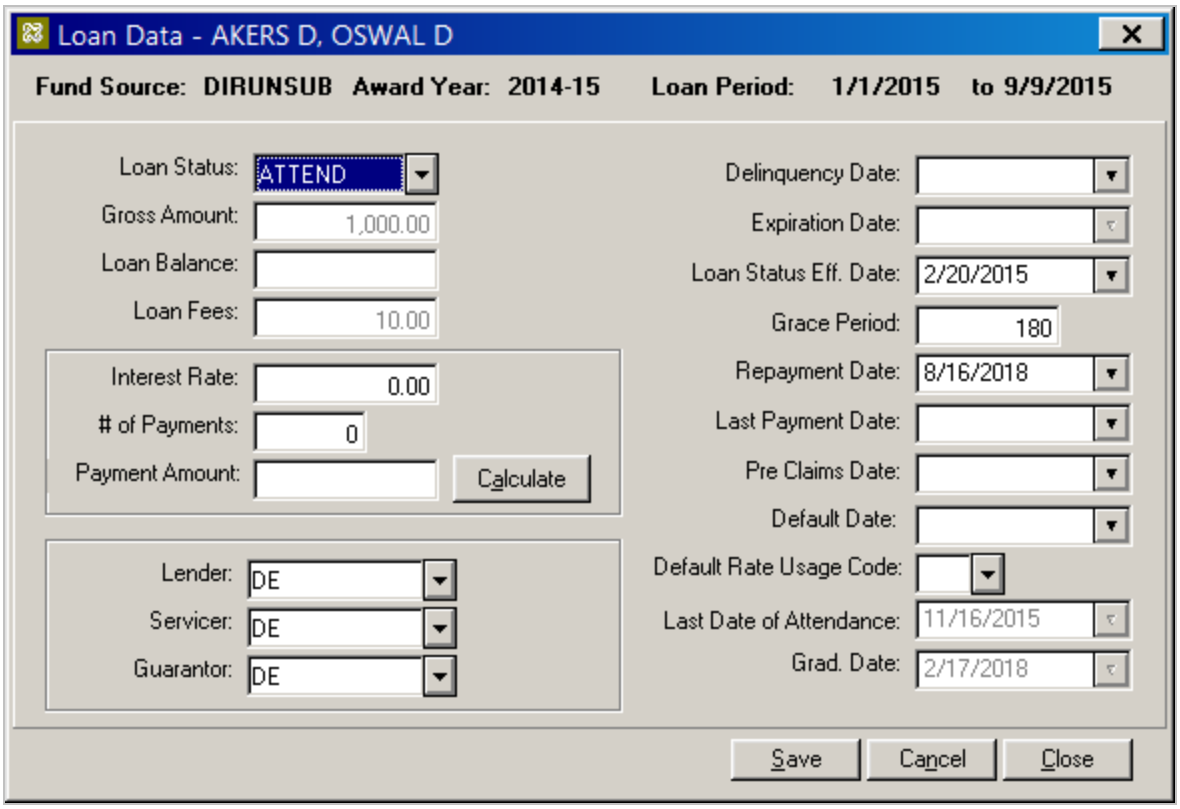


3. Select the **Enrollment**. The drop-down displays the enrollment number, program description and school status. This is helpful when a student has more than one enrollment in the same Program Version.
4. Select a **Loan Management Advisor**. You can edit the advisor if you have the authority to do so. The LM Advisor may be selected during the enrollment process if your institution has been set up to do so. For more information, see Setup > Academic Records > Enrollment.
5. Enter an **Exit Interview Date** if it is time to do so. If you enter a date, click **Save** at the top of the form to save it. The last date of attendance is displayed in the **Last Day Att.** field.
6. Click **Print Exit Interview** to get a report that can be used by the Loan Management Office for conducting the exit interview with a departing student.

   The report is to be signed by the student to indicate that the student understands the terms of the loans and repayment obligations. If the student has a PLUS or a DIRPLUS loan, the report is to be signed by the student's parent.

An Exit Interview report for groups of students can be produced from **Reports > Loan Management**.

7. Select a loan and click **Edit** to see the details. The Loan Data form is displayed.



8. Select or enter data in the form based on the table below. Some fields are read-only.

Loan Data Fields

Field Label	Display/Edit	Comments
Fund Source	Display	
Award Year	Display	
Loan Period	Display	
Loan Status	Edit	
Gross Amount	Display	
Loan Balance	Edit	
Loan Fees	Display	
Interest Rate	Edit	
# of Payments	Edit	
Payment Amount	Edit	Click **Calculate** to calculate and display the payment amount.

Field Label	Display/Edit	Comments
Number of Payments	Edit	
Delinquency Date	Edit	
Expiration Date	Edit	When the Loan Status is changed to Forbearance or Deferment, you must enter an Expiration Date. If you do not enter the date, you are prompted for it when you click **Save**. Display only after LmLoanStatusType is changed to DEFER or FORB.
Loan Status Effective Date	Edit	
Lender	Edit	
Servicer	Edit	
Guarantor	Edit	
Grace Period	Edit	
Repayment Date	Edit	
Last Payment Date	Edit	
Pre Claims Date	Edit	
Default Date	Edit	Represents the date that the student is considered to be in default of the loan. Enter or select the date from the calendar.
Default Rate Usage Code	Edit	The usage code identifies how the loan is used in the institution's default rate calculation and is supplied on the Loan Records Detail Report that the institution receives. The following system defined codes are available: • B – Both Numerator and Denominator • D – Denominator only • E – Eligible but not counted • N – Not used
Last Date of Att.	Display	
Grad. Date	Display	

9. Click **Save** to save any changes.

   When you save changes to Loan Management data, you are prompted to confirm if you want to change all the student's loans.

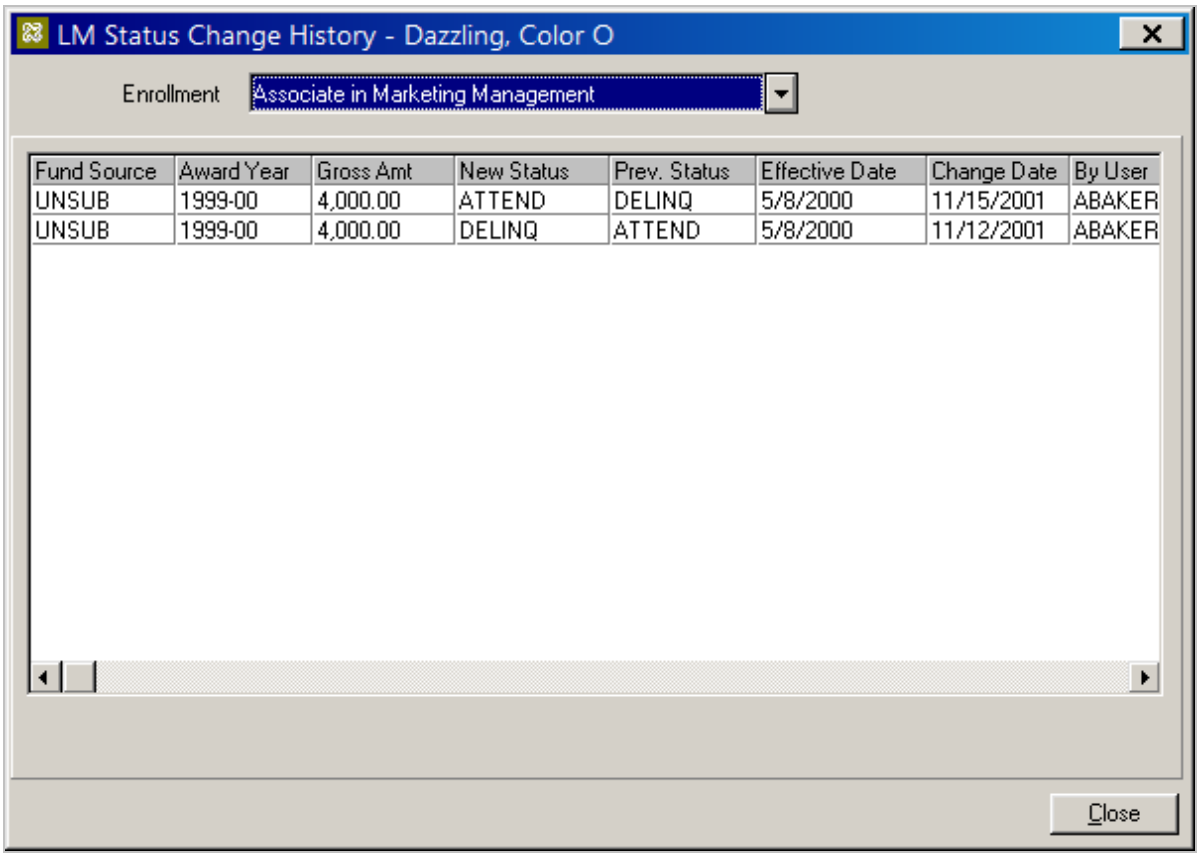
   - If you click **Yes**, all records shown in the grid are updated with the changes you make to the current record.
   - If you click **No**, only the current record is changed.

When the Loan Status is changed, the Financial Aid Loan information is updated and a record is added to the Loan Management Status Change table. The status change table is updated with the previous status, new status, effective date of the change, date changed, and user who made the change.

Loan Status History

You can view loan status changes for a selected student. Loan status changes are made automatically by the CampusNexus Student (such as when a student changes from enrollment status to attending) and manually by the Loan Management office. See View > Loan Management > Loan Management.

1. Select a student.
2. Navigate to **View > Loan Management > Loan Status History**. The LM Status Change History form is displayed. This is a read-only form.



3. Click **Close** to close the form.

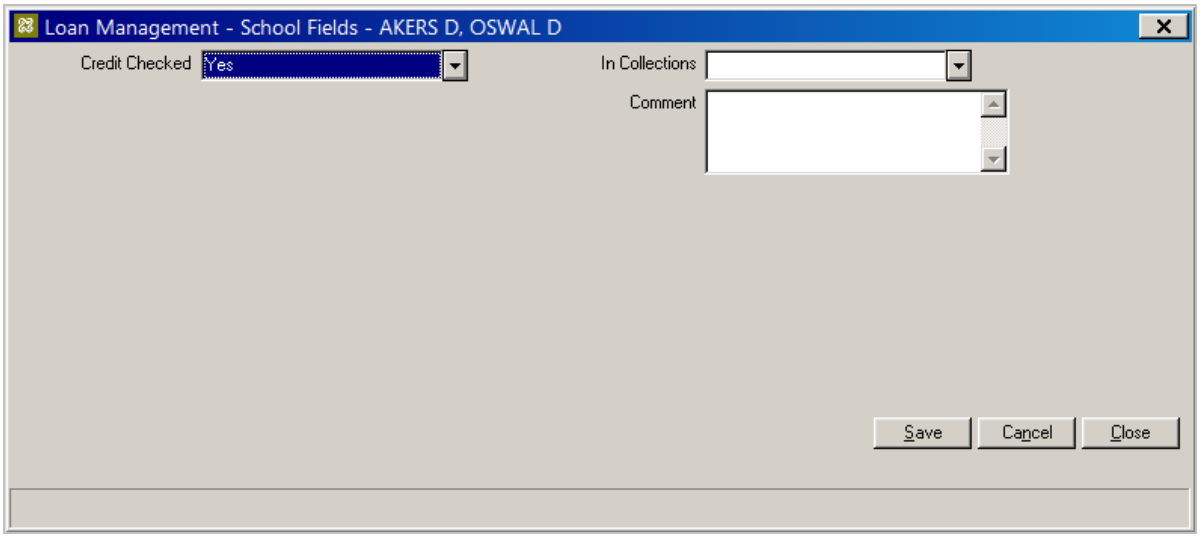
School Fields - Loan Management

School-defined fields can be created for loan management at your institution. These fields are created by the administrator under Setup > School Defined Fields > Student.

To view or edit school-defined fields:

1. Select a student.
2. Navigate to **View**>**Loan Management**>**School Fields**. The Loan Management - School Fields form is displayed if fields have been defined for your institution.

   Fields that you can edit have a white background. Fields that you can view but not edit have a gray background. These fields are usually controlled by other departments. Either type of field may not have any data at the time you view it.



3. Enter data as required in the fields that you can edit.
4. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

View > Student Services

Functions related to student services such as housing, athletics, and veteran information are handled via this menu. The options on this menu apply to the student selected from the Recent Students list.The options on this menu apply to the student selected from the Recent Students list.

Menu Item	Description
Student	Displays the Student Master form.
Housing Information	Displays housing information for enrolled students.
School Fields	Displays the form used to view or enter data in school-defined fields related to the Student Services module and public fields from other modules.
Services	Displays the form used to define all services for which students are billed by the institution.
Athletics	Displays the athletics information for the student.
Disability Services	Displays the disability services for the student.
Audit	Displays the audit for disability services, veteran information, and athletics.
Veteran Information	Displays the veteran information for the student.

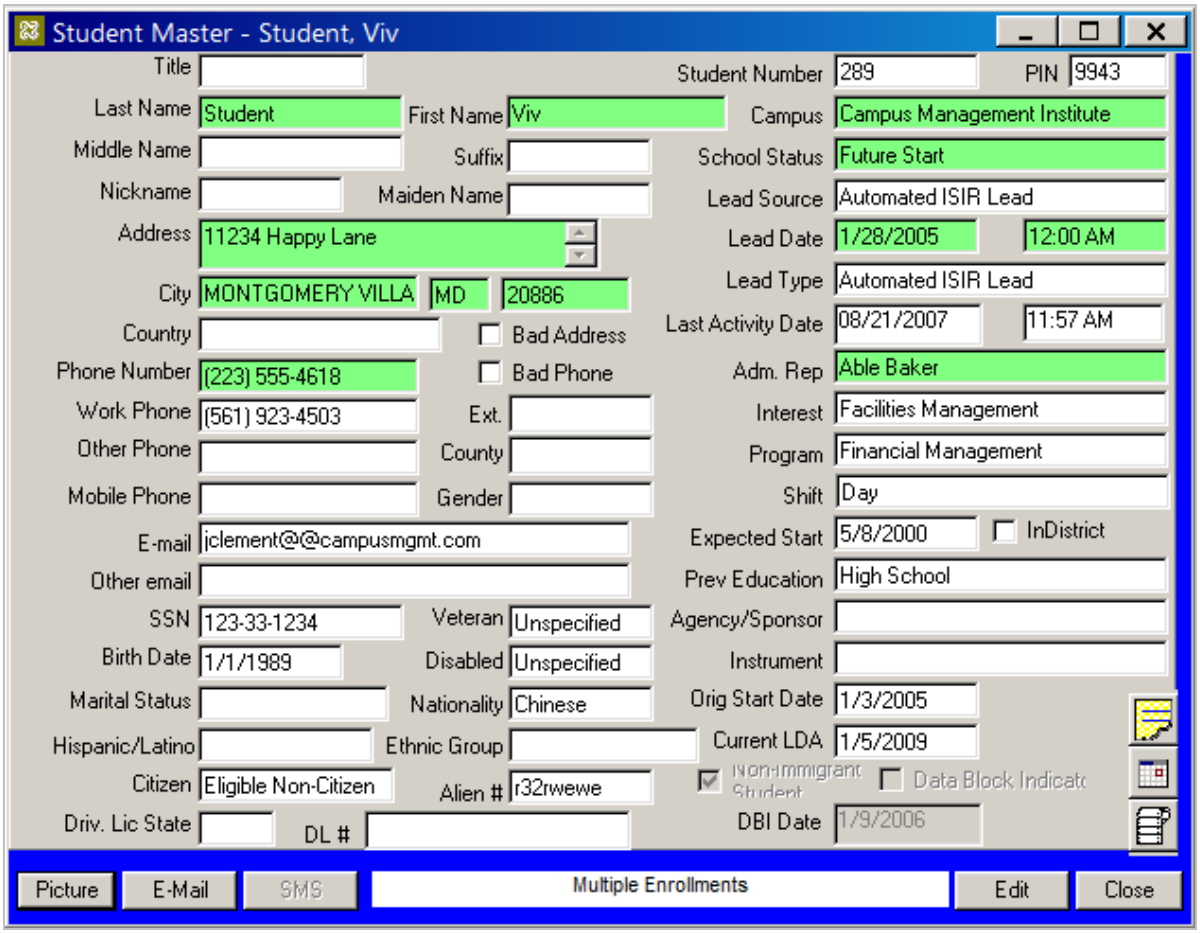
The options on the Student Bar are the same as the options on the View menu, unless the Student Bar has been altered by the user.

Student Master

The Student Master form contains much of a student's basic demographic information. The Student Master form is usually (but not necessarily) populated in the Admissions module by adding a new lead to the database. New leads are entered using the Quick Lead Entry form or the Add New Lead **Ctrl+L** option on the File menu. The **Ctrl+N** key combination can also be used to start a new Student Master record (form) without entering a quick lead.

To view a Student Master form:

1. Select one of the following options:
    - Click **Student** on the Student Bar.
    - Double-click **Recent Students** on the Toolbar. When you change the student in the Recent Students list, a new Student Master form is displayed. If you already have a Student Master form open, it remains open in the background.
    - From the **View** menu navigate as follows:
        - Contact Manager > Student
        - Admissions > Student
        - Financial Aid > Student
        - Student Accounts > Student
        - Academic Records > Student
        - Career Services > Student
        - Loan Management > Student
        - Student Services > Student
        - Housing > Student
    - Use the **Find** menu or click on the Toolbar to search for a student.



Note: The border color around the Student Master form indicates the student's status category. In the setup options under Setup > Status Codes > Colors Tab, your system administrator can choose colors for the status categories.

2. Multiple Student Master forms can be displayed at the same time. The forms always open in the same place in the work area. Unless you have closed, moved, or minimized a previous Student Master form, the next form you open covers the previous form.

   To move between open Student Master forms use the **Window** menu and select **Tile** or **Cascade** to organize all open forms in the work area.

   When you are working with multiple students, ensure that the correct form is current (active). The name of the current student is always shown in the Recent Students text box. The title bar of the active form is always a different color than other forms which may be open in your work area.

3. To edit the information on the form, click **Edit**. See Edit a Student Master.

   Required fields on the form have a background color other than white. If a required field is blank, you must enter data in it when you edit the form, even if you did not intend to provide the information when you clicked Edit.

   Some fields are required by CampusNexus Student (Last Name, First Name, Lead Date, Admissions Rep). Additionally, your institution may designate other fields as required. The system administrator can mark fields as required in either of two ways.

- Open any Student Master (or Quick Lead) form and go to Setup > Required Fields.
- Designate the field as required in the Data Dictionary.

4. To add an activity from the Student Master form, click the **Add Activity** icon at the bottom right of the form. The Activity form is displayed.
5. Click **Close** (Ctrl+F4) to close the active Student Master form. If you are in edit mode when you click Close, you are prompted to save any changes.

Duplicate Student Records

CampusNexus Student checks for duplicate Student Master records when new leads or students are added. The following table columns are used to check for duplicates:

- Student ID
- Social Security Number
- Phone Number
- Date of Birth and Student Name (combined)
- Driver's License Number
- E-mail address.

Each check is performed only if you entered data in the corresponding field. If at least one match is found, a grid showing the matches is displayed

If the lead is a duplicate and can be found on the grid, click the record and the lead form is populated with the information for that lead. The information can then be edited. The campus for the lead can be changed only if the campus ID for the record from the grid is in the list of campuses to which you have access.

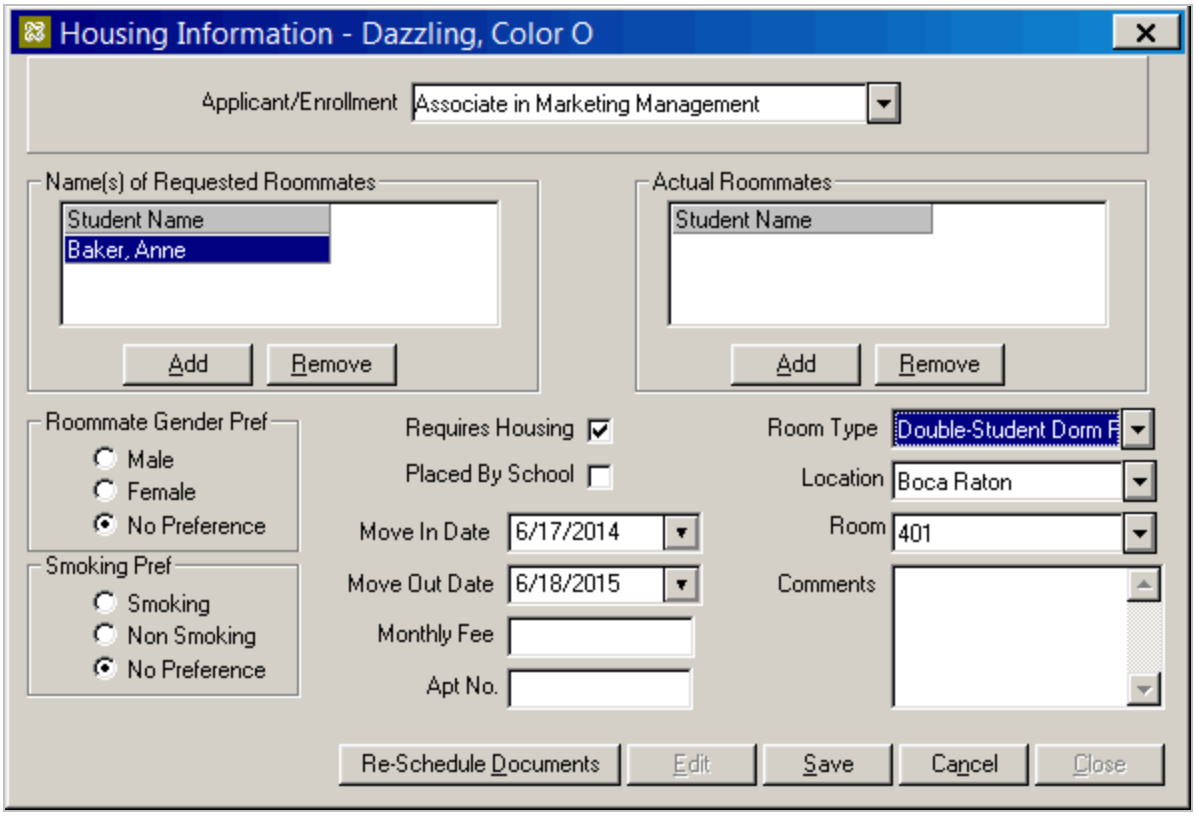
Housing Information

The Housing Information form is available for enrolled students only. You can indicate that a student requires housing assistance. You can select the names of requested roommates and actual roommates from a search of students in your school. Additional information on this form includes roommate gender preference, smoking preference, room type preference, location, room assigned, move in and move out dates, and monthly fees.

Room Types, Locations, and Rooms, Service Categories, Services and Service Billing Method are set up under **Lists > Student Services**.

To enter student housing information:

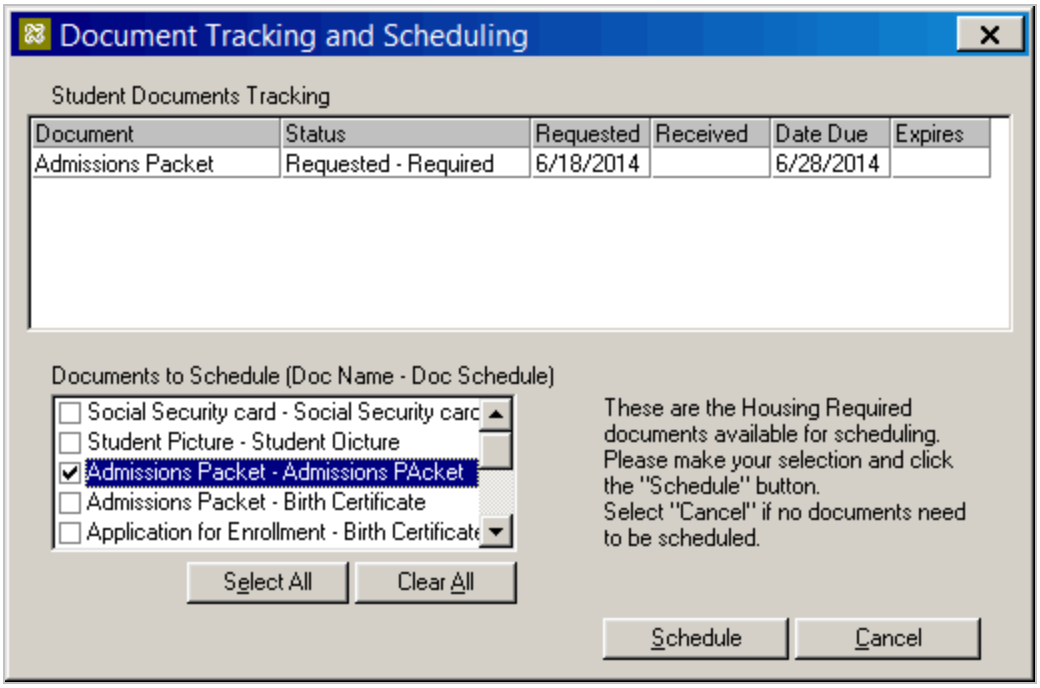
1. Navigate to **View** > **Student Services > Housing Information**. A form similar to the one below is displayed.



2. Click **Add** in the Names of Requested Roommates and Actual Roommates boxes. The **Student Search** form is displayed. Search and select a student.
3. Use the radio buttons to select **Preferences**.
4. Use the drop-down lists to select **Move In Date** and **Move Out Date**.
5. Select or clear **Requires Housing**. If you indicate that the student requires housing, certain documents, such as proof of health insurance and proof of immunizations will be added to the student's list of required documents. For details, refer to Schedule Documents.
6. Select or clear **Placed by School** to indicate that the student was placed in this housing by the school.
7. Fill in the other information as desired and click **Save**.

8. Click **Re-Schedule Documents** to update required documents for student housing. The **Document Tracking and Scheduling** form is displayed. This form shows all documents associated with "Required Housing" that are available for scheduling.

   To associate documents with the Required Housing flag, go to Daily > Contact Manager > Schedule Documents.



9. Select documents from the list, assign dates, and click **Schedule**. Click **Cancel** if no documents need to be scheduled. Use the **Select All** and **Clear All** buttons if appropriate.

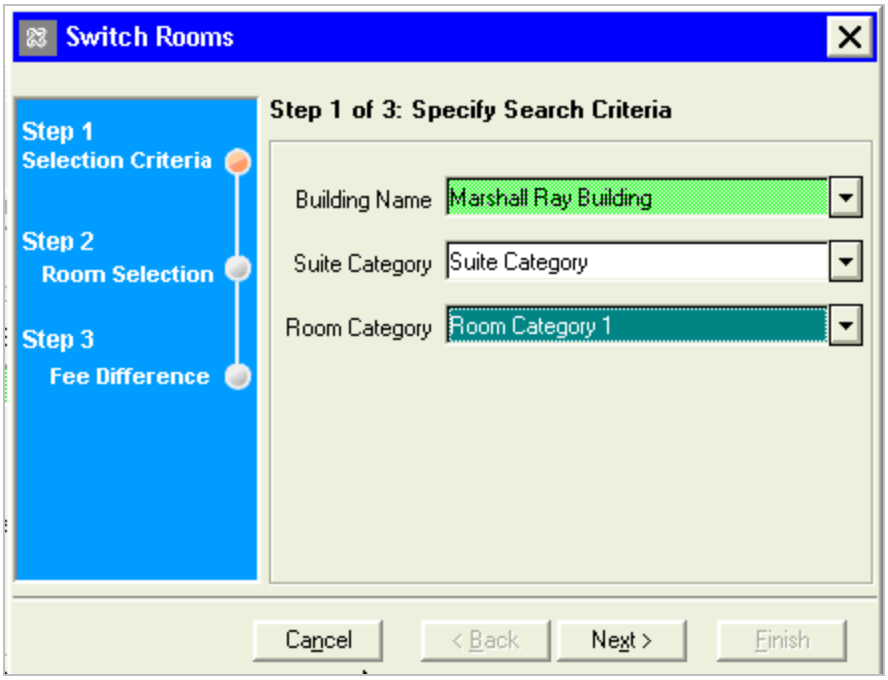
Switch Rooms

The Switch Rooms wizard automates the process of moving a student from one room to another. You can use this wizard to move a student from an assigned room to another available room.

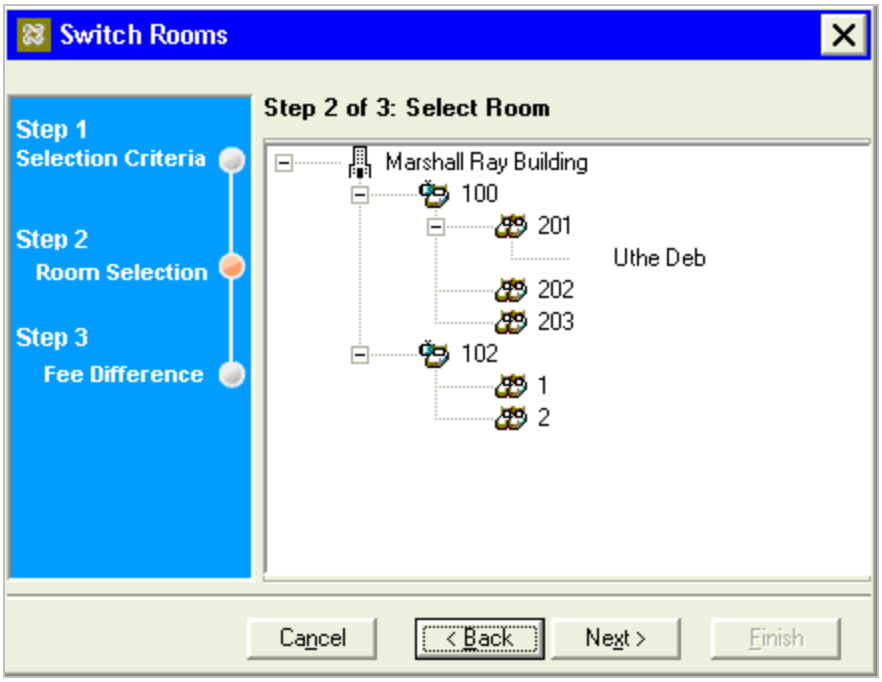
The Switch Rooms wizard allows you to select the room search criteria, assign a new available room to the student, and adjust the fee difference. You can then confirm that the student's lease is reassigned to the new room.

To switch rooms:

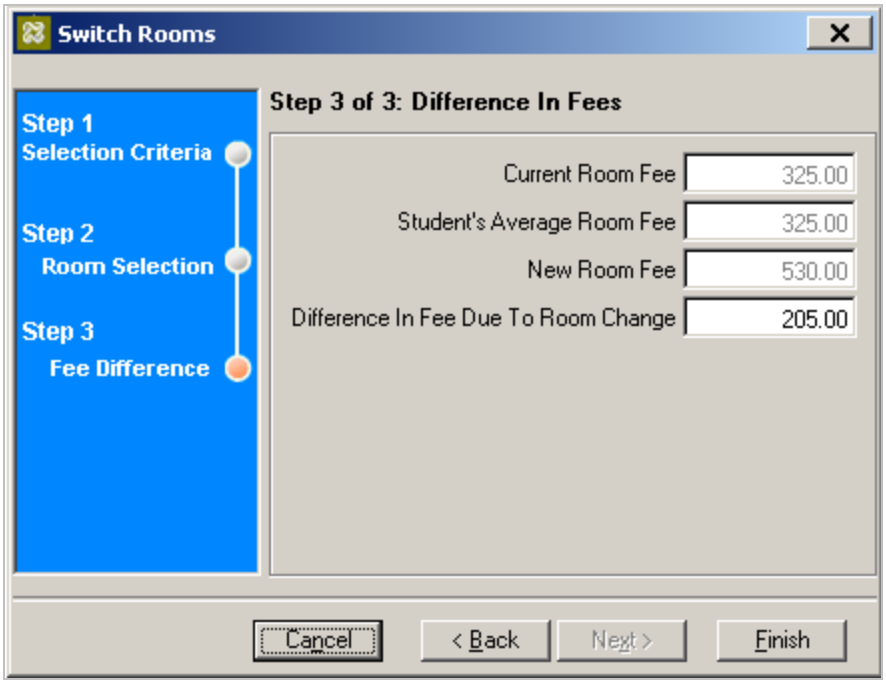
1. Navigate to **View > Housing >*select student's room record*> Edit > Switch Rooms**.
2. Step 1 of the Switch Rooms wizard is displayed. The **Select Search Criteria** form, allows you to search by the Building Name, Suite Category, and Room Category. The available rooms are displayed based on the search criteria that you have selected. Make your selections and click **Next** to continue.



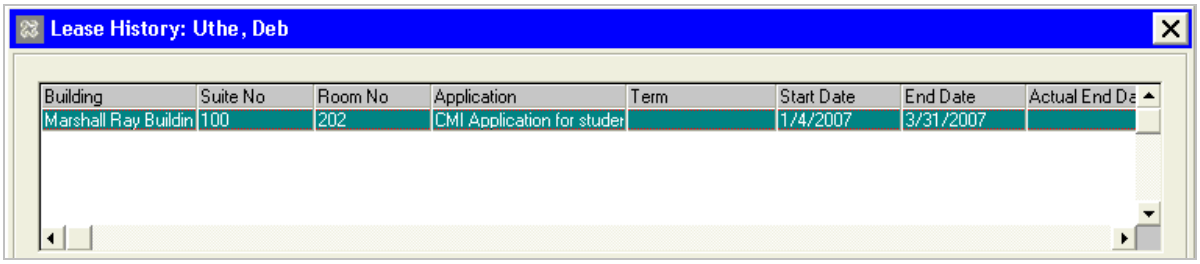
3. Step 2 is the **Select Rooms** form. The room that the student is assigned to is displayed. You can select the new room for the student. In this example, the student is currently assigned to room 201 and will be moved to room 202.



4. Click on room 202 and click **Next** to move the student to room 202.
5. Step 3 of the Switch Rooms wizard displays the fee difference between the rooms. The monetary values of each room are displayed and may not be changed. However, the **Difference in Fee Due to Room Change** field reflects the difference in the fees, but may be altered before clicking **Finish**.



6. The Lease History for the student now reflects the room changed to room 202.

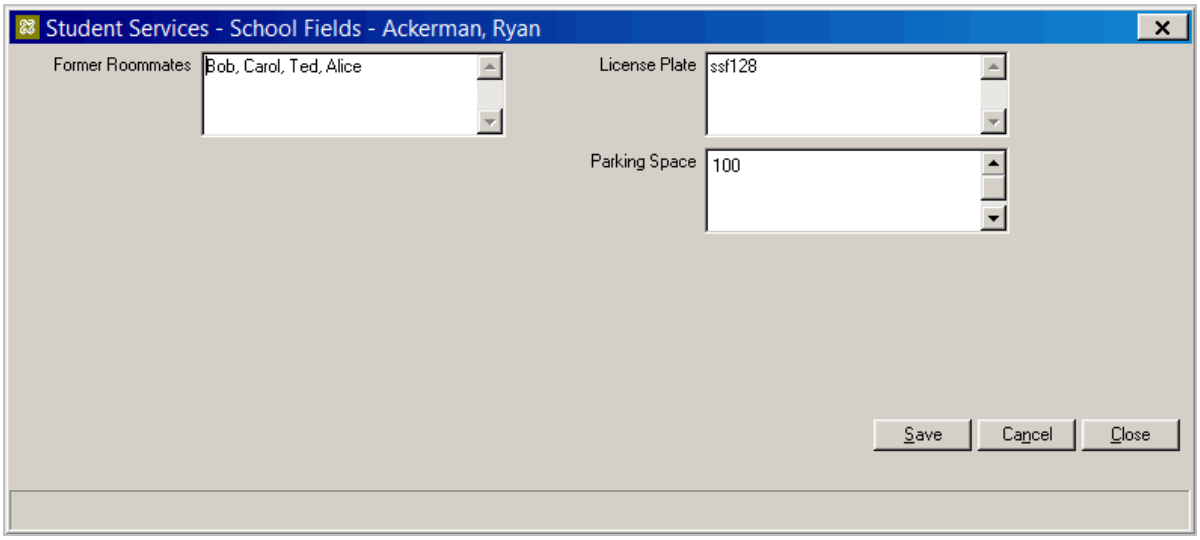

Lease History: Uthe, Deb
Building
Suite No
Room No
Application
Term
Start Date
End Date
Actual End Da
Marshall Ray Buildin
100
202
CMI Application for studer
1/4/2007
3/31/2007

School Fields - Student Services

You can add information for a student in the Student Services - School Fields form. School-Defined Fields are set up under Setup > School-Defined Fields.

To enter information into the School Fields form:

1. Navigate to **View** > **Student Services > School Fields**.



2. Specify the data and click **Save**.

Services

Student Services are non-academic items that are part of the student life cycle, such as housing, meal plans, insurance, and parking. Fees for Services can apply during registration billing or at any time throughout the term. The Student Services form enables you to define all Services for which students are billed by the institution.

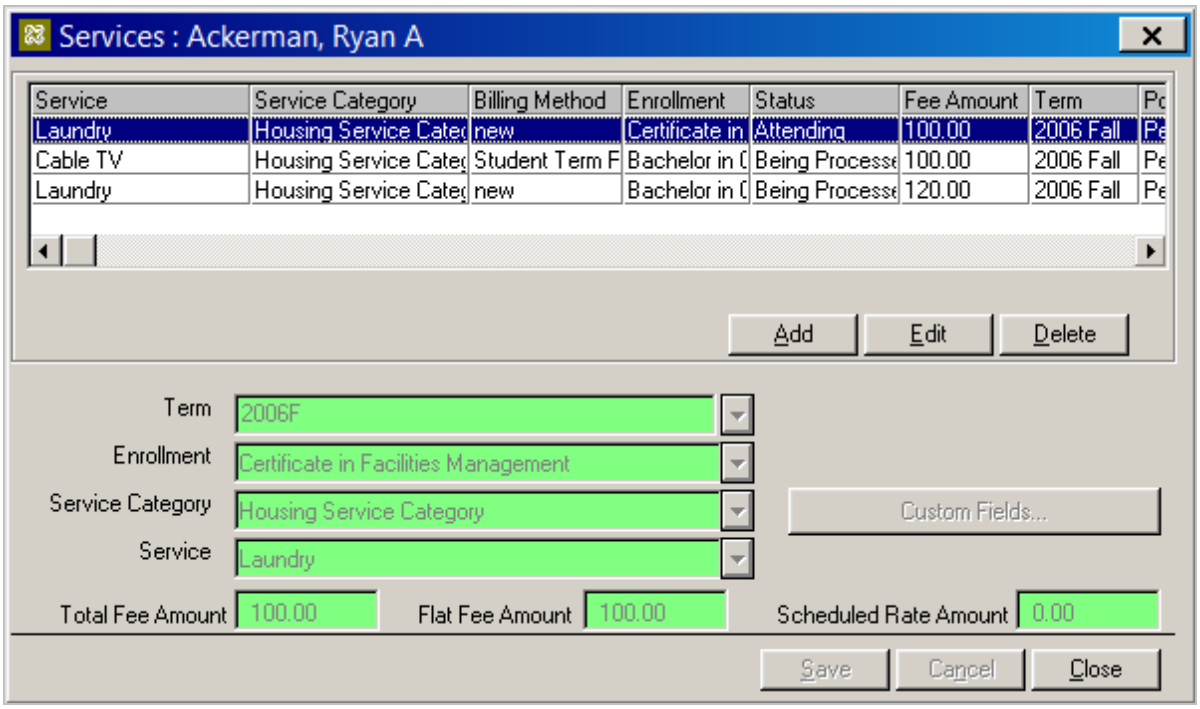
While Student Services staff are the owners of the Services and their assessments, Student Accounts staff can review and change any charges before they are posted to a student account.

For billable school services that are not included in those provided by CampusNexus Student, add School-Defined Services and then create and associate Custom Fields with a Student Service. You can enter values in the Custom Fields when they are added to a student record. CampusNexus Student stores these values on each instance of a Service per student.

Students can view a list of services available to them on Portal. There is also a configurable option to permit or deny students to edit a custom field on the Student Services form.

To manage Student Services:

1. Navigate to **View** > **Student Services > Services**.

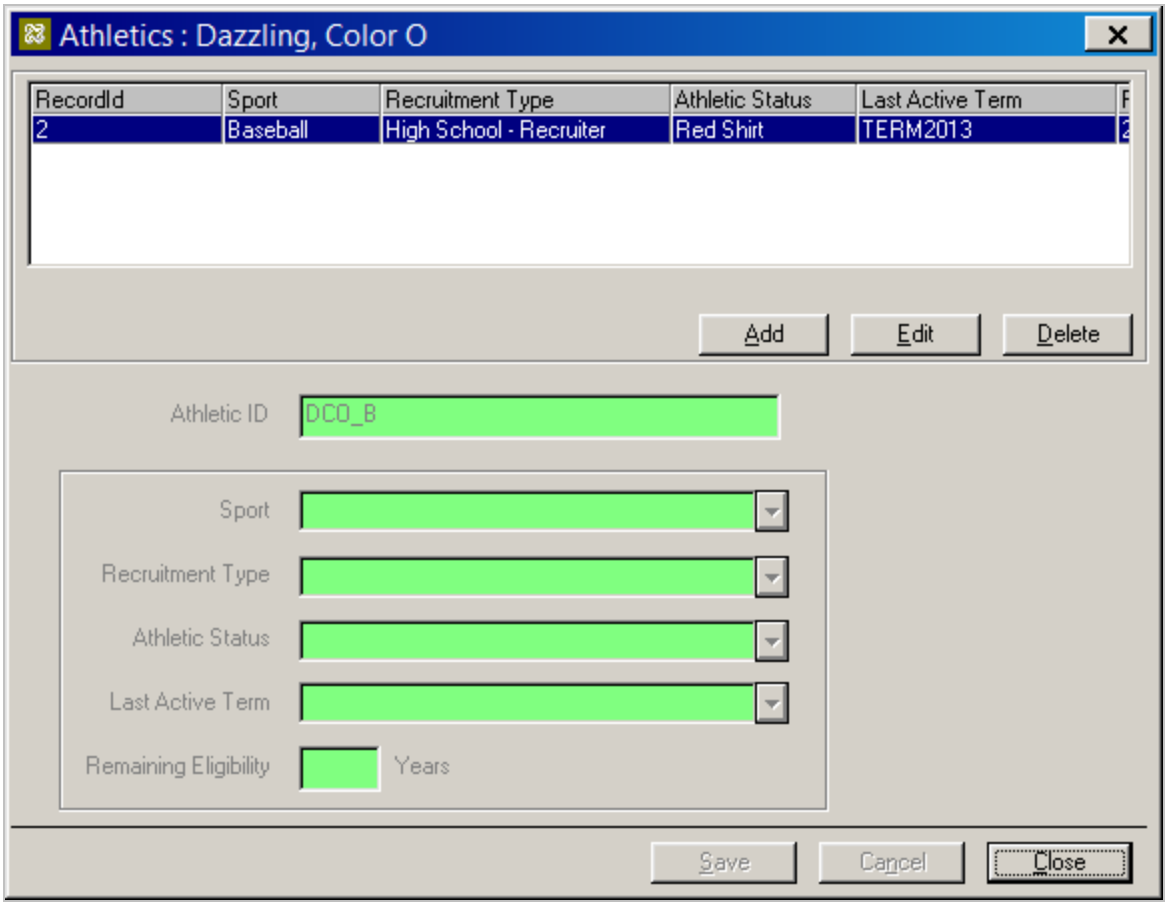


2. Click **Add** to add a Service.
3. Click **Edit** to edit an existing Service.
4. Click **Save** to save your changes.
5. Click **Delete** to delete a Service.

Athletics

The Athletics form is available if your institution is configured as a Member of an Athletic Association.

1. Navigate to **View > Contact Manager > Student** and **search** for the desired student.
2. Navigate to **View > Student Services > Athletics**.



3. Click **Add**. The fields on the form become enabled.
4. Specify the **Athletic ID**. (This ID is assigned to the student by an Athletic Association such as NCAA or NJCAA).
5. Select the type of sport this student participates in from the **Sports** drop-down menu.
6. Select the **Recruitment Type**.
7. Select the current **Athletic Status**.
8. Select the last active **Term**.
9. Specify the number of **Remaining Eligibility** Years.
10. Click **Save** and **Close**.

Repeat these steps for all your student athletes.

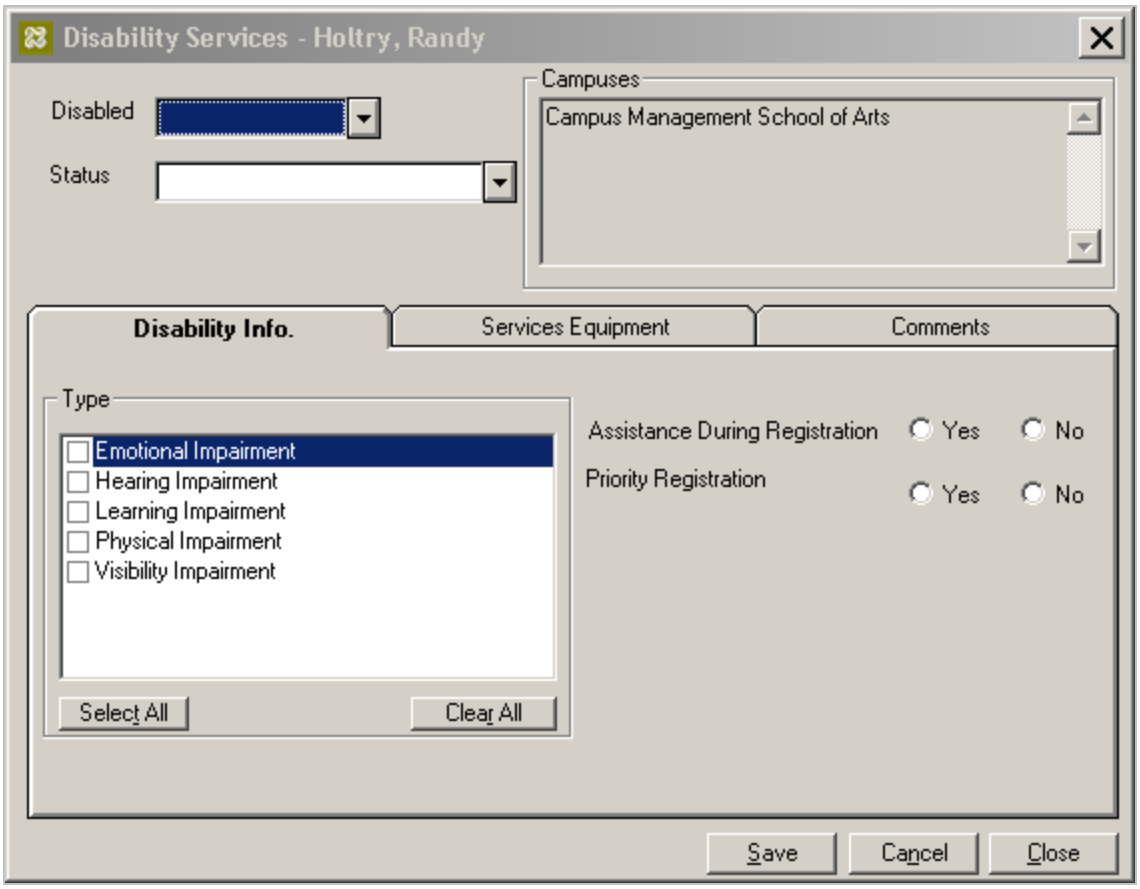
Notes:

- You can add fields to this form to make it more usable to your type of campus sport offerings. See School-Defined Fields. Moreover, custom fields can be created to accommodate special services for your campus. See Custom Fields for Student Services.
- You can define Registration Groups to enable Priority Registration for your student athletes. Moreover, student groups can be used to designate student athletes who may only have changes made to their schedule or course load by staff members who have been given authority to override registration blocks or credit limits through the use of Registration Locks.

Disability Services

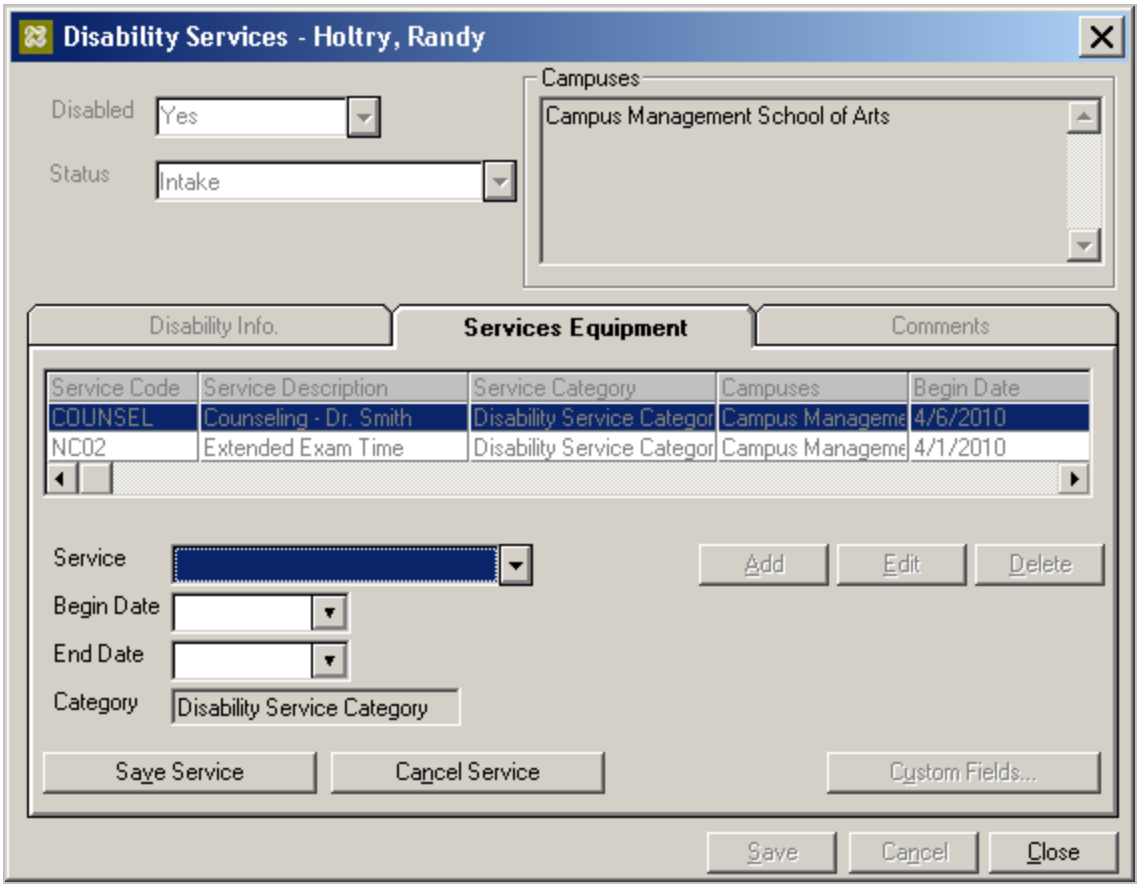
You or your system administrator can assign one or more staff groups permissions to access to the Disability Services information. The permissions can be configured by navigating to Setup > Security.

1. Locate a student by navigating to View > Contact Manager > Student and search for the desired student.
2. Navigate to **View > Student Services > Disability Services**.



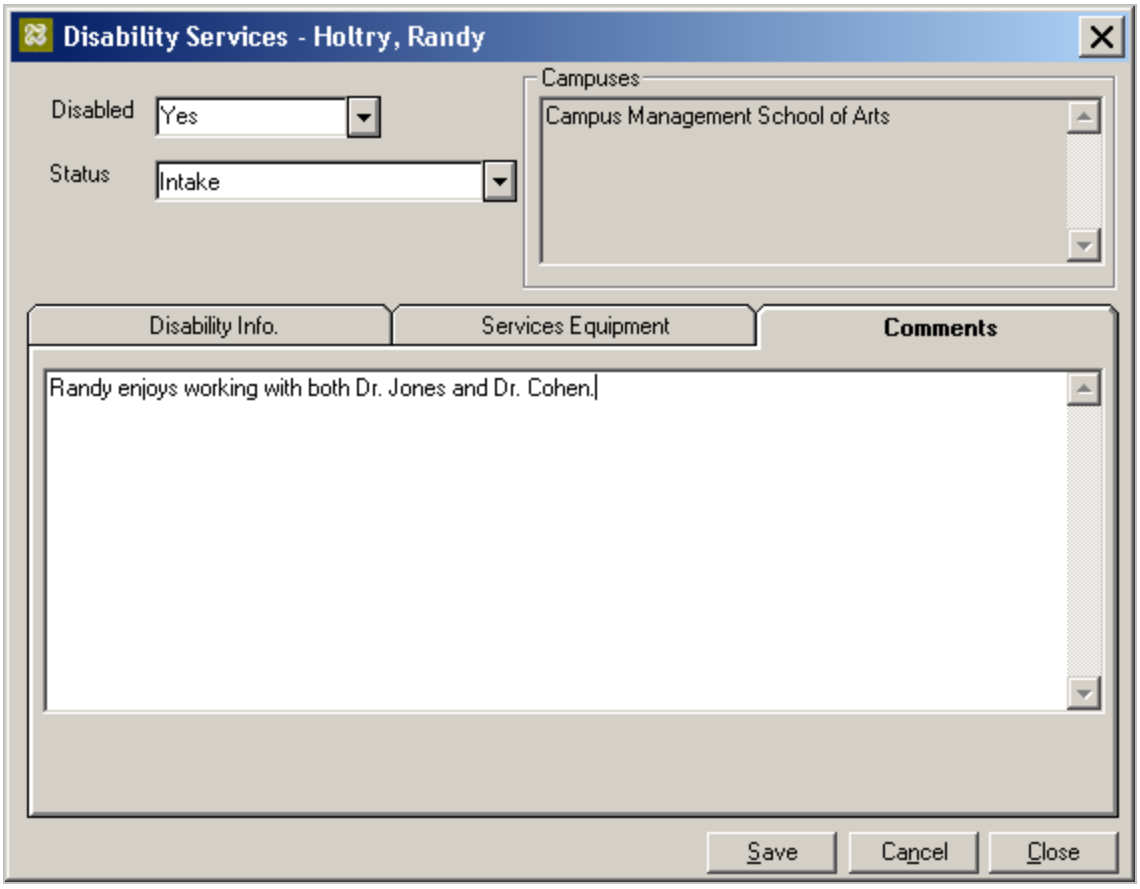
3. Select the "Yes" or "No" from the **Disabled** drop-down list.
4. Select the appropriate **Status**.

   Note: The Status options are configurable by navigating to **Lists > Student Services > Disability Services Status**.
5. Note the student's enrolled campuses, the student's master campus, and the student's class schedule campus.
6. On the **Disability Info.** tab, select the disability types applicable to the student.
7. Click **Save**.
8. A confirmation message is displayed. Click **OK**.
9. Select the **Service Equipment** tab.
10. Click **Add** to enable the fields.



11. Select the services, one at a time for the student from the **Service** list.
12. Enter the **Begin Date** and **End Date** of the selected service.

    Note: The Service Category is automatically saved as a Disability Service Category and cannot be changed or edited.
13. Click **Save** to add this service for the student. The service you selected, along with the begin and end dates, is added to the service details grid.
14. Click **Edit** to change any of the information in the service details grid.
15. Click **Delete** to delete a service shown in the service details grid.
16. Click **Cancel Service** to cancel the service.
17. To view any custom data that has been defined for the Services Equipment, click **Custom Fields**. See Custom Fields.
18. Continue these steps until you have recorded all necessary services for the student.
19. Click the **Comments** tab. Enter any comments in the **Comment** field.

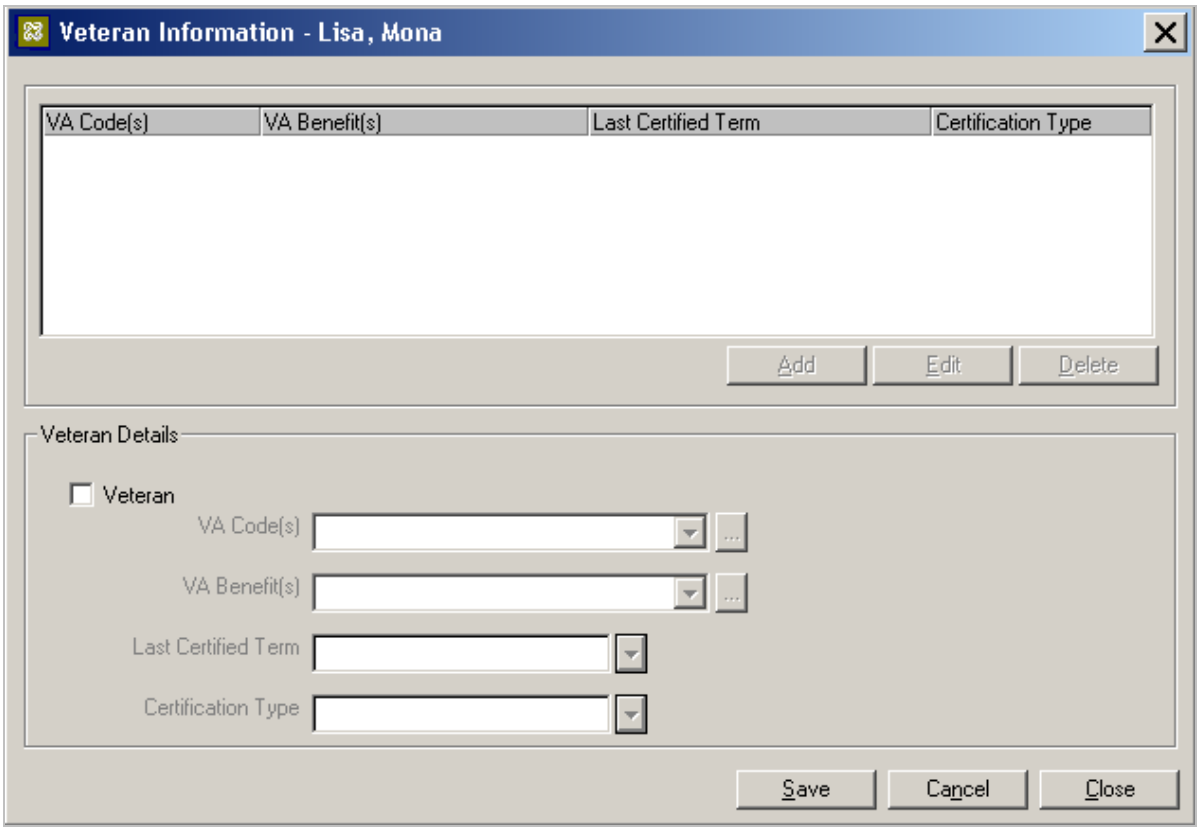


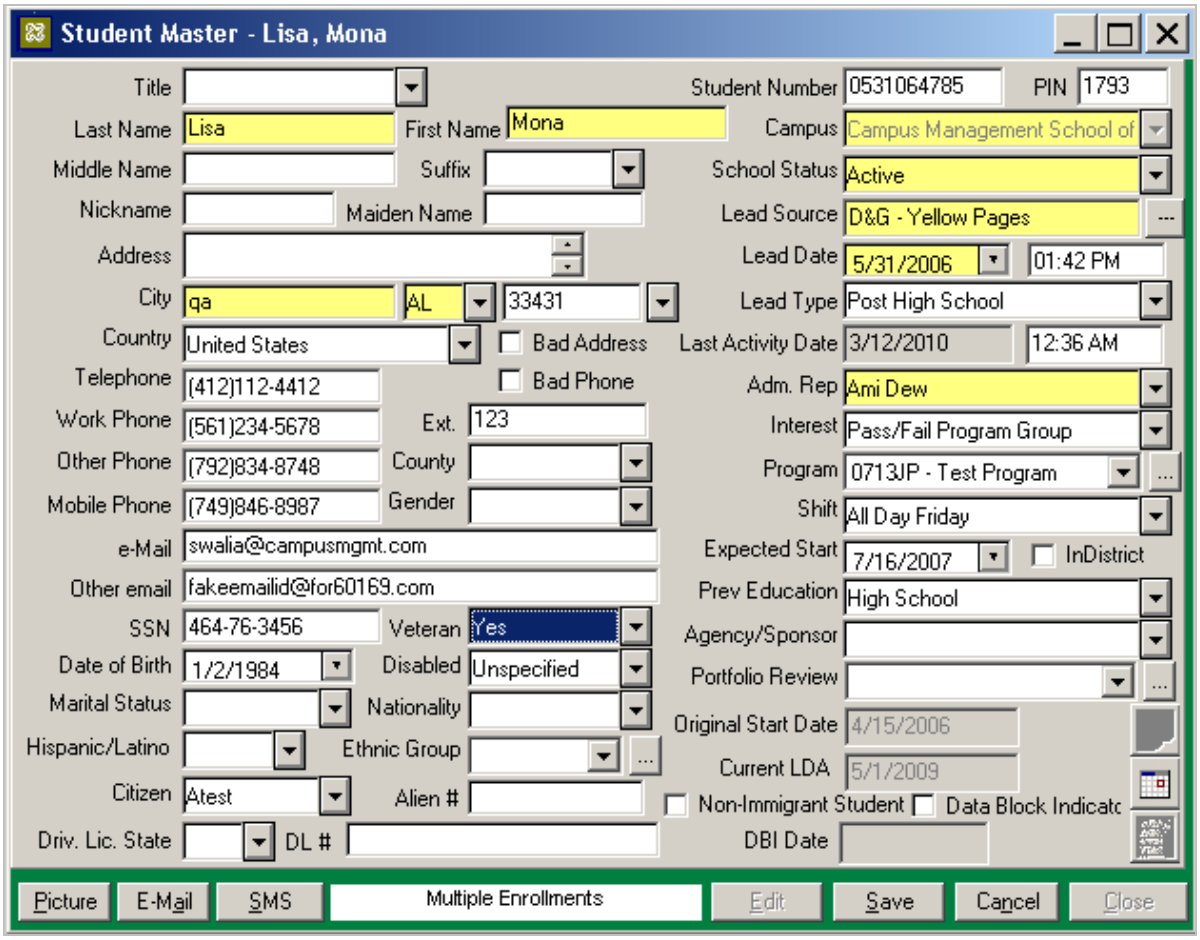
20. Click **Save**.
21. A confirmation message is displayed. Click **OK**.

Veteran Information

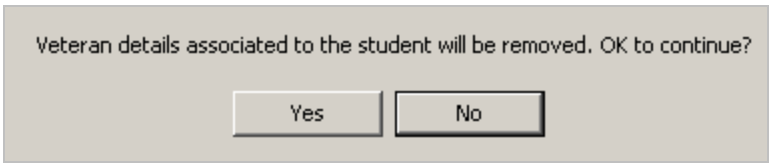
You or your Veterans Affairs (VA) Advisors can assign the Veteran attribute to a student.

1. Navigate to **View > Student Services > Veteran Information**.
2. Select the **Veteran** check box under the Veteran Details. The Student Master form will be updated and the Veteran field will be set to "Yes".





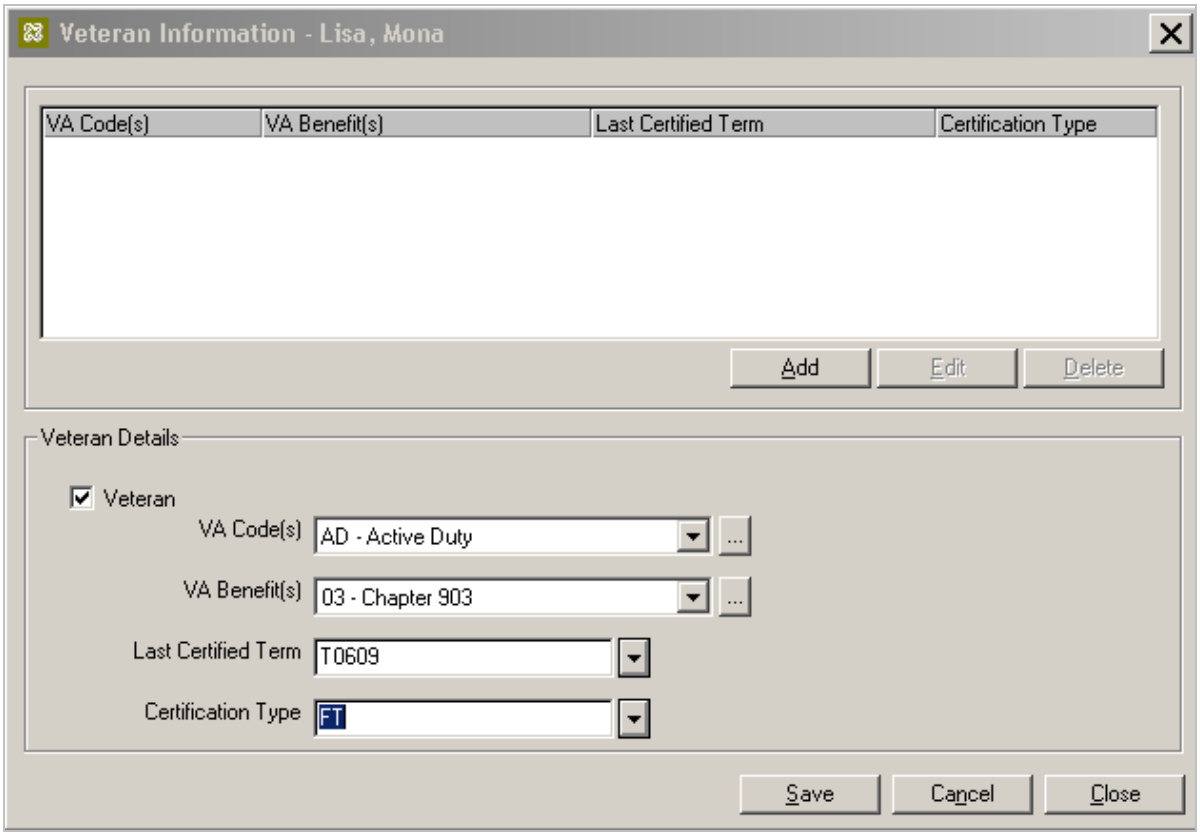
Note: If you try to change a student's Veteran Status on the Student Master form, the following message is displayed:



If you select yes, the Veteran Information is removed from both the Student Master form and the Veteran Information Details form.

3. Click **Save**.
4. A confirmation message is displayed. Click **OK**.
5. Click **Add**.
6. Select the **VA Code(s)**, **VA Benefit(s)**, **Last Certified Term**, and **Certification Type**).

   Note: The VA Code(s) and VA Benefit(s) lists allows multiple selections.



7. Click **Save**. .
8. A confirmation message is displayed. Click **OK**.
9. Click **Close** to close the form.

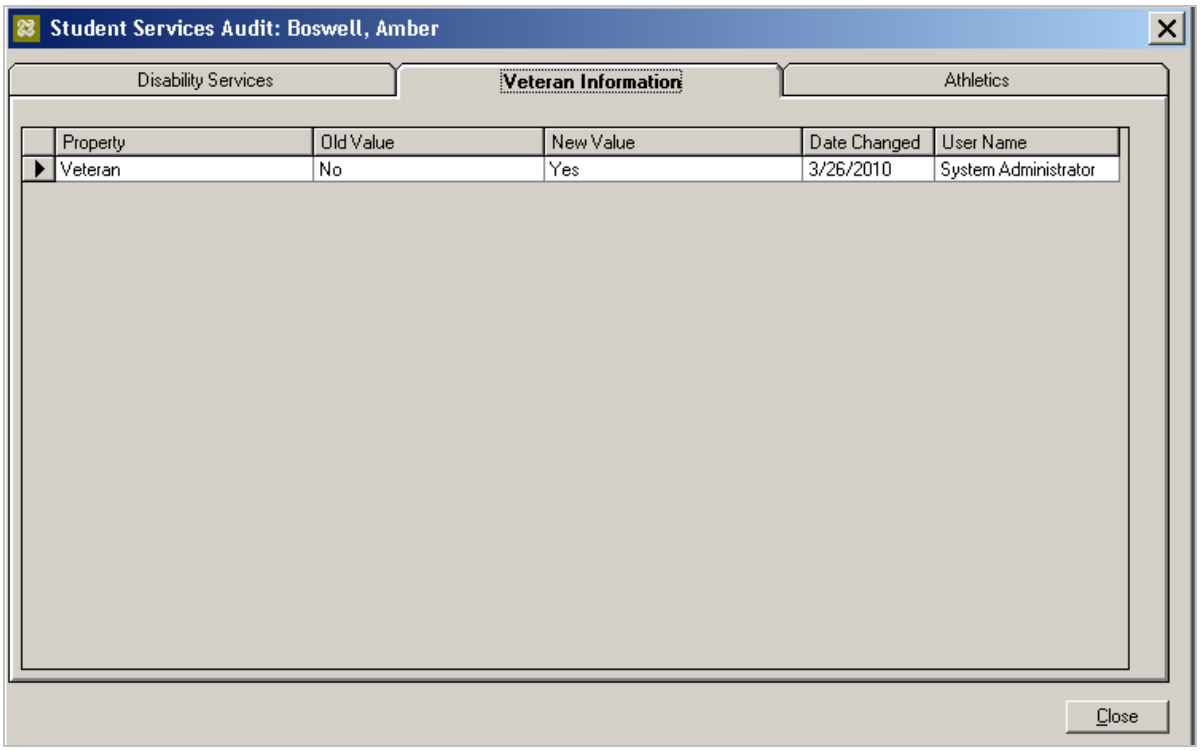
Best Practices

To report on current and previous certified terms it is suggested to:

Run the Veteran Information Report and save the output as a student group at the end of each term, or add a new VA record for each term the student is certified.

Audit

This form can be accessed by navigating to View > Student Services > Audit. The Audit form stores the Veterans Affairs property, old and new value, date of change and the user who made the change. Audits are viewable for **Athletics**, **Disability Services** and **Veteran Information**, by selecting the appropriate tab.



View > Housing

Functions related to campus housing arrangements and fees are handled via this menu. The options on this menu apply to the student selected from the Recent Students list.The options on this menu apply to the student selected from the Recent Students list.

Menu Item	Description
Student	Displays the Student Master form.
Deposits	Displays the form used to post housing deposits.
Application / Lease	Displays the form used to work with the housing applications and housing leases for a student.
Services	Displays the form used to add a service for a student and place the specified charge on the student's ledger.
School Fields	Displays the form used to view or enter data in school-defined fields related to the Housing module and public fields from other modules.
Audit	Displays the audit for housing leases and student applications.

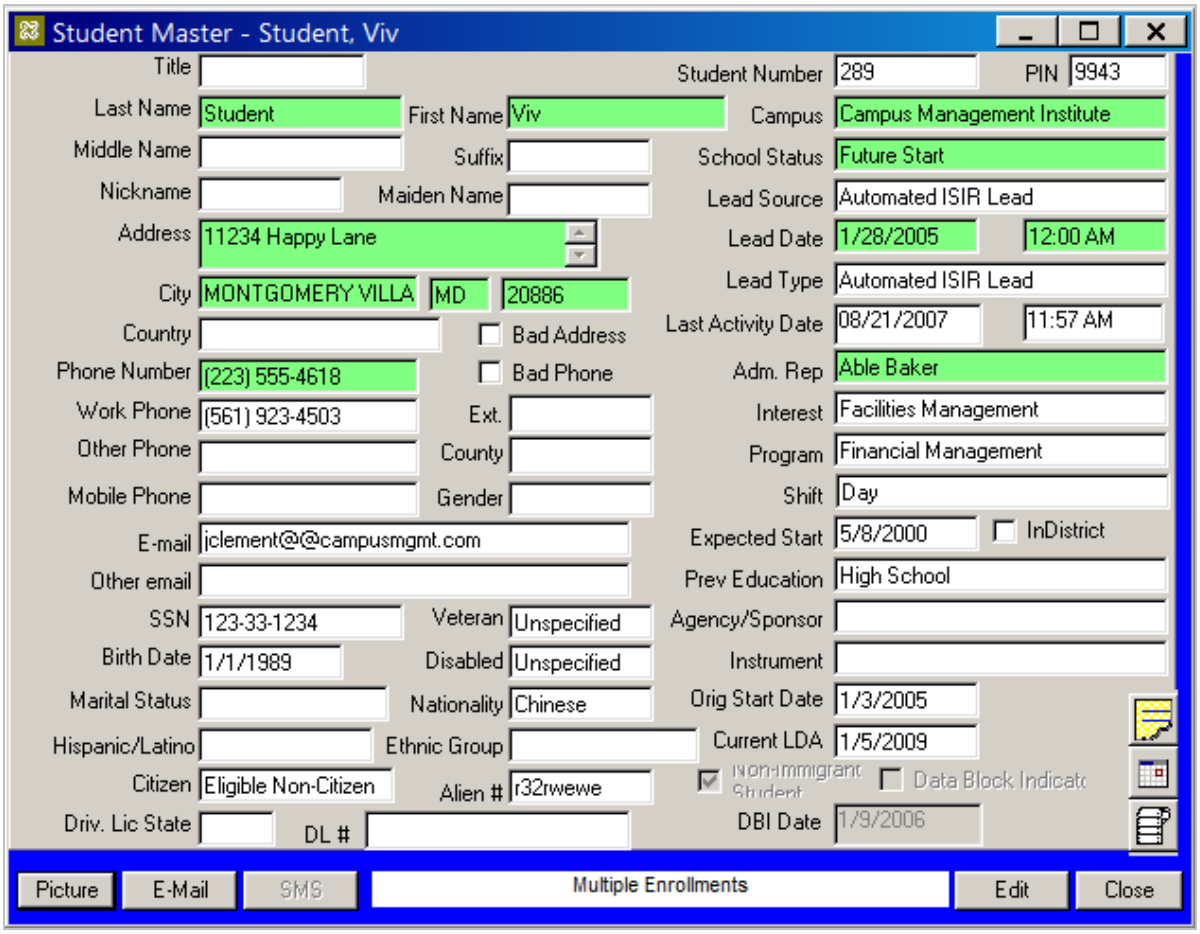
The options on the Student Bar are the same as the options on the View menu, unless the Student Bar has been altered by the user.

Student Master

The Student Master form contains much of a student's basic demographic information. The Student Master form is usually (but not necessarily) populated in the Admissions module by adding a new lead to the database. New leads are entered using the Quick Lead Entry form or the Add New Lead **Ctrl+L** option on the File menu. The **Ctrl+N** key combination can also be used to start a new Student Master record (form) without entering a quick lead.

To view a Student Master form:

1. Select one of the following options:
    - Click **Student** on the Student Bar.
    - Double-click **Recent Students** on the Toolbar. When you change the student in the Recent Students list, a new Student Master form is displayed. If you already have a Student Master form open, it remains open in the background.
    - From the **View** menu navigate as follows:
        - Contact Manager > Student
        - Admissions > Student
        - Financial Aid > Student
        - Student Accounts > Student
        - Academic Records > Student
        - Career Services > Student
        - Loan Management > Student
        - Student Services > Student
        - Housing > Student
    - Use the **Find** menu or click on the Toolbar to search for a student.



Note: The border color around the Student Master form indicates the student's status category. In the setup options under Setup > Status Codes > Colors Tab, your system administrator can choose colors for the status categories.

2. Multiple Student Master forms can be displayed at the same time. The forms always open in the same place in the work area. Unless you have closed, moved, or minimized a previous Student Master form, the next form you open covers the previous form.

   To move between open Student Master forms use the **Window** menu and select **Tile** or **Cascade** to organize all open forms in the work area.

   When you are working with multiple students, ensure that the correct form is current (active). The name of the current student is always shown in the Recent Students text box. The title bar of the active form is always a different color than other forms which may be open in your work area.

3. To edit the information on the form, click **Edit**. See Edit a Student Master.

   Required fields on the form have a background color other than white. If a required field is blank, you must enter data in it when you edit the form, even if you did not intend to provide the information when you clicked Edit.

   Some fields are required by CampusNexus Student (Last Name, First Name, Lead Date, Admissions Rep). Additionally, your institution may designate other fields as required. The system administrator can mark fields as required in either of two ways.

- Open any Student Master (or Quick Lead) form and go to Setup > Required Fields.
- Designate the field as required in the Data Dictionary.

4. To add an activity from the Student Master form, click the **Add Activity** icon at the bottom right of the form. The Activity form is displayed.
5. Click **Close** (Ctrl+F4) to close the active Student Master form. If you are in edit mode when you click Close, you are prompted to save any changes.

Duplicate Student Records

CampusNexus Student checks for duplicate Student Master records when new leads or students are added. The following table columns are used to check for duplicates:

- Student ID
- Social Security Number
- Phone Number
- Date of Birth and Student Name (combined)
- Driver's License Number
- E-mail address.

Each check is performed only if you entered data in the corresponding field. If at least one match is found, a grid showing the matches is displayed

If the lead is a duplicate and can be found on the grid, click the record and the lead form is populated with the information for that lead. The information can then be edited. The campus for the lead can be changed only if the campus ID for the record from the grid is in the list of campuses to which you have access.

Housing Deposits

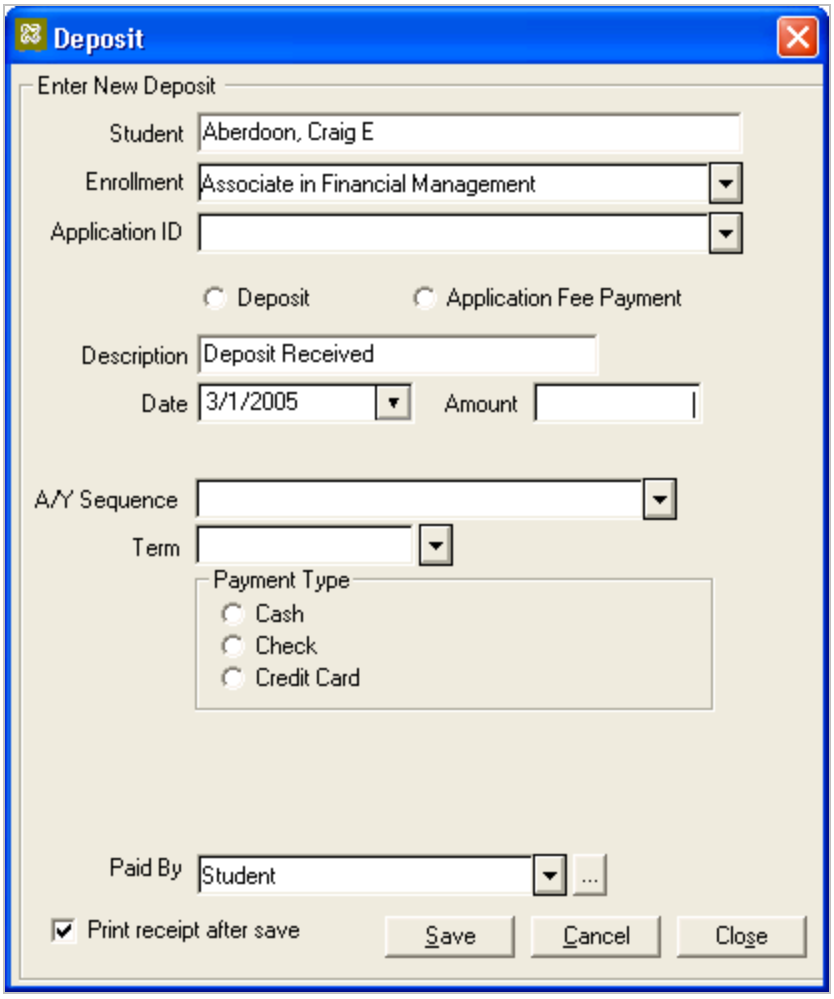
Schools can collect admission and housing deposits and application fee payments using a Deposit form that closely mimics the functionality of the current Admissions Deposit form. The housing deposit may be processed even when an application is not submitted.

Deposits do not show on the ledger card until they are posted in the Student Accounts department. There is an option on the Daily menu in Student Accounts to post deposits to the student's ledger card.

Housing deposits are included on the Admissions Deposits report.

To post housing deposits:

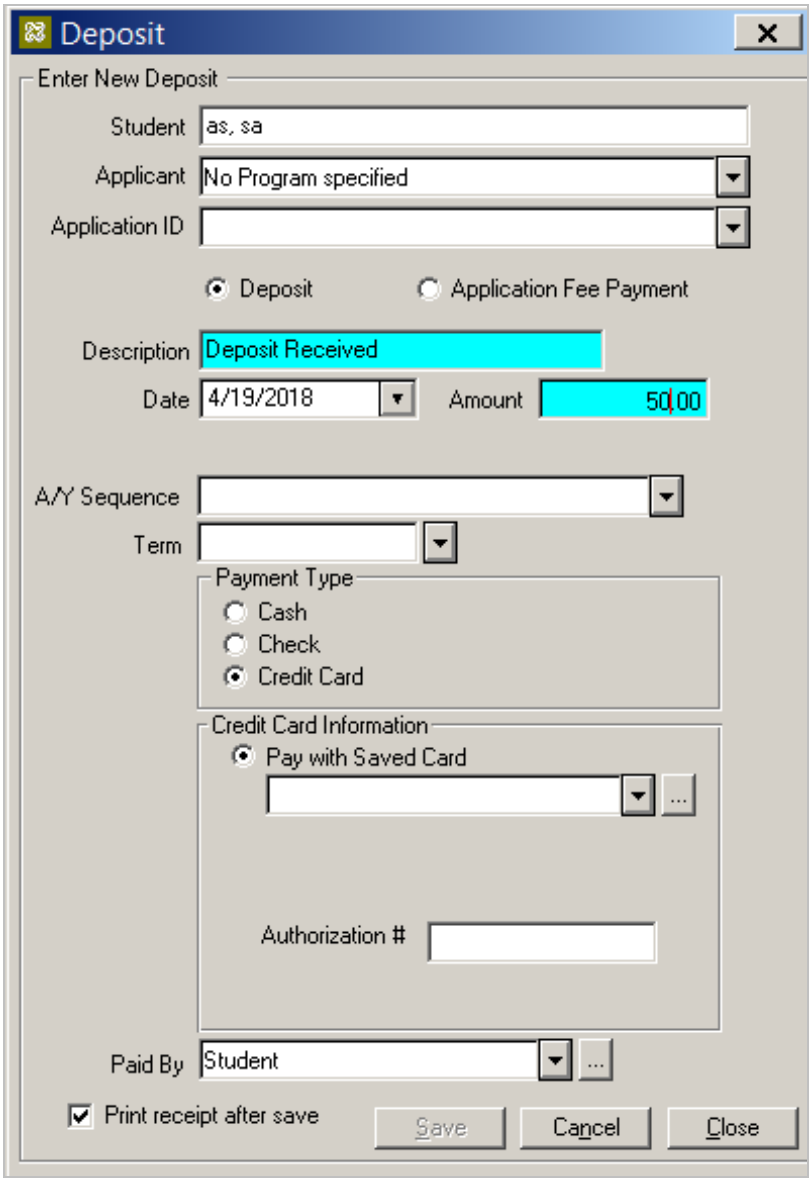
1. Navigate to **View > Housing > Deposits**. If you are posting the first deposit for the student, the Deposit form is displayed. See also Post Deposits.



2. If there are any deposits already on file for the selected student, a grid showing the previous deposits is displayed. You can select a deposit and click **Cancel Deposit** and cancel it. To reprint the receipt, click **Reprint Receipt**.
3. Click **Close** to close the form.
4. Click **New Deposit** to post payments for deposits and application fee payments.

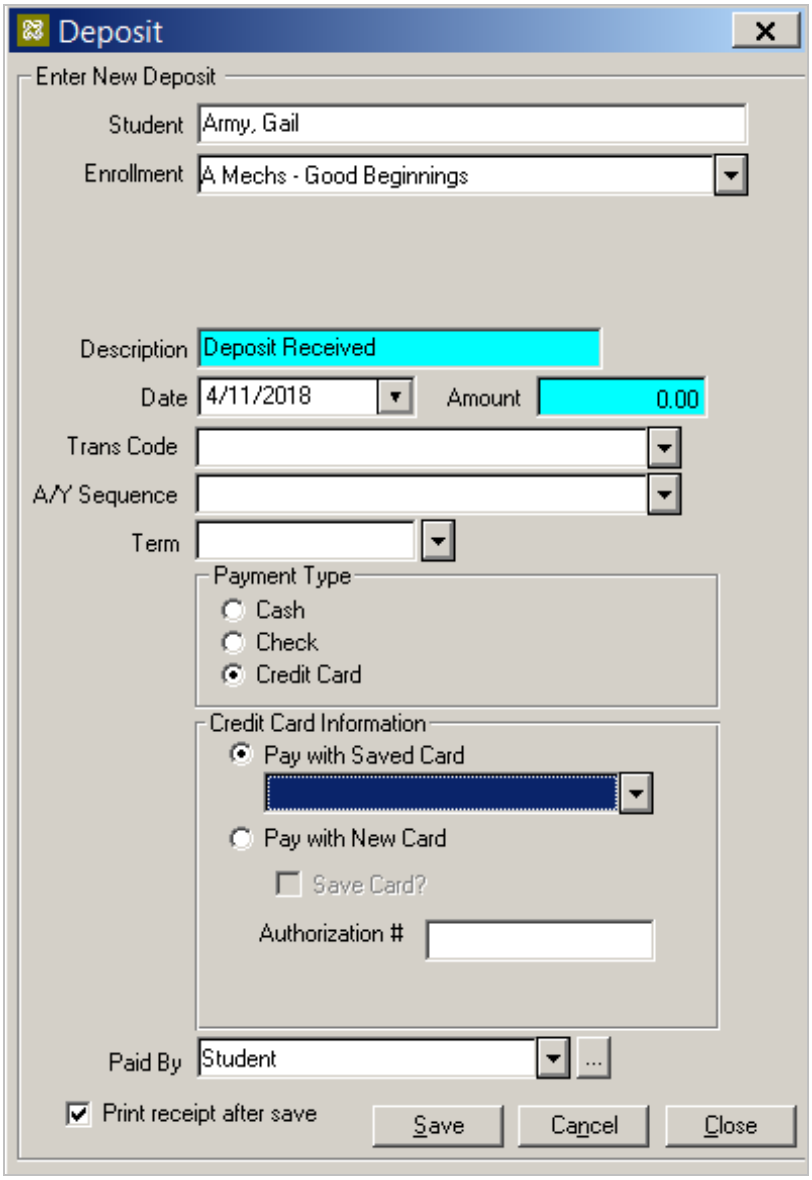
5. Select an Application ID. The application code is displayed from the Student Application form (under **Lists > Housing > Application** tab **> Application Code Setup**).
6. If the radio button **Deposit** is selected, the **Description** field, by default, displays **Deposit Received**. Similarly, if the radio button **Application Fee Payment** is selected, the **Description** field displays **Application Fee Payment Received**.
7. Enter the **Date** and **Amount** of the deposit or fee.
8. Select the **Term** that this deposit is for.
9. Select the **A/Y (Academic Year) Sequence**.
10. If you are entering a new deposit, select one of the **Paid By** options, student, parent, etc.
11. Select a **Payment** type. The options are **Cash**, **Check**, or **Credit Card**.

    If you select the **Credit Card** payment type, the system changes the form to show the **Credit Card Information** fields and buttons. For details see the topic Deposit.



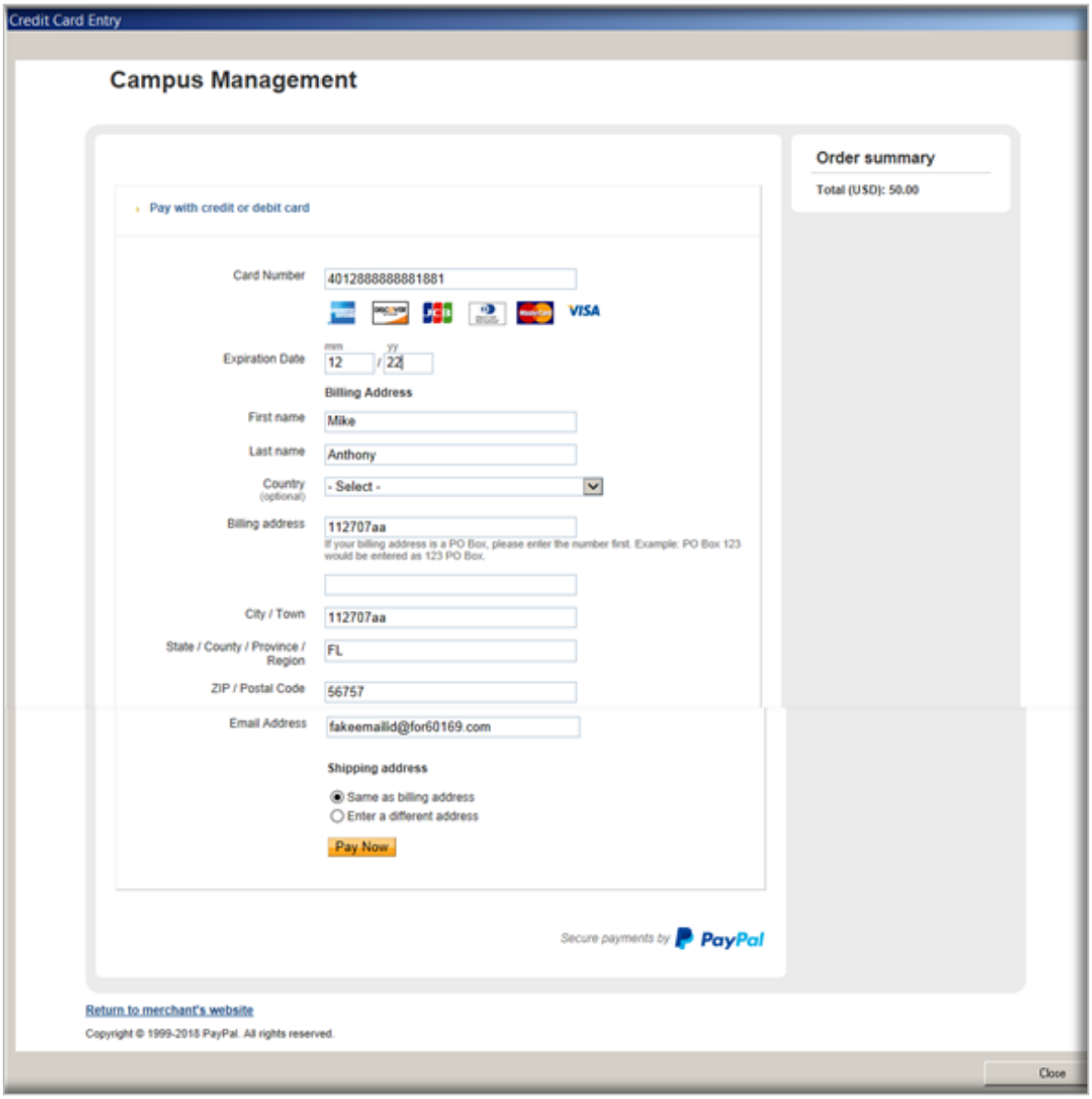
Note: If the student's campus is configured to Verify Credit Card Payments Posted Using CampusNexus Student (Campus Information - Electronic Processing Tab), there are two options for Credit Card Payment Type:

- Pay with Saved Card
- Pay with New Card

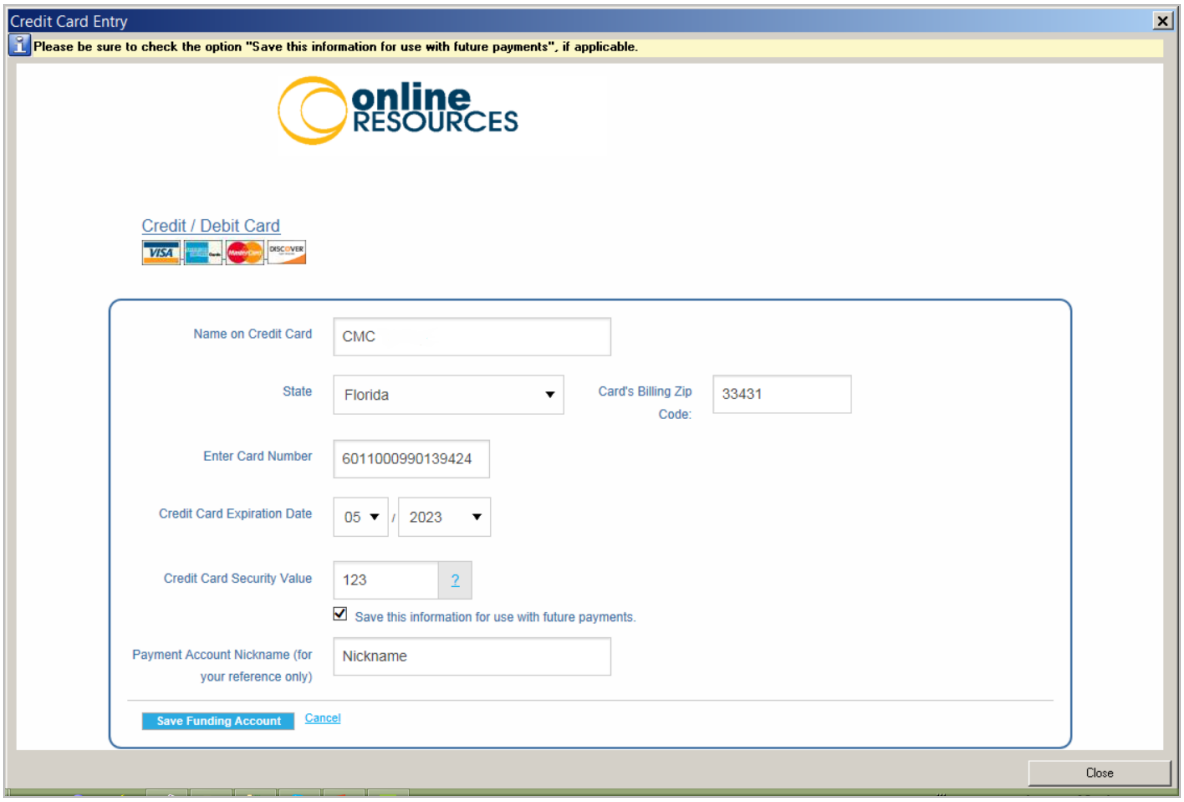


12. Click **Save**. If you want a receipt, select **Print receipt after save**.
13. If you have selected the **Pay with New Card** option, you are redirected to the payment gateway provider's hosted page to enter credit card information to complete the transaction.**Note:** Selecting the **Save Card?** check box will save the new card to the database as Active for future transactions. If you do not save the card, the card will be saved but will be marked as Inactive and won't be available for selection for future transactions.

PayPal


Credit Card Entry
Campus Management
Order summary
Total (USD): 50.00
Pay with credit or debit card
Card Number
4012888888881881
VISA
Expiration Date
mm
12
yy
22
Billing Address
First name
Mike
Last name
Anthony
Country
(optional)
- Select -
Billing address
112707aa
If your billing address is a PO Box, please enter the number first. Example: PO Box 123 would be entered as 123 PO Box.
City / Town
112707aa
State / County / Province / Region
FL
ZIP / Postal Code
56757
Email Address
fakeemailid@for60169.com
Shipping address
Same as billing address
Enter a different address
Pay Now
Secure payments by PayPal
Return to merchant's website
Copyright © 1999-2018 PayPal. All rights reserved.
Close

ACI


Credit Card Entry
Please be sure to check the option "Save this information for use with future payments", if applicable.
online RESOURCES
Credit / Debit Card
Name on Credit Card
CMC
State
Florida
Card's Billing Zip Code:
33431
Enter Card Number
6011000990139424
Credit Card Expiration Date
05
2023
Credit Card Security Value
123
?
Save this information for use with future payments.
Payment Account Nickname (for your reference only)
Nickname
Save Funding Account
Cancel
Close

View Housing Applications

This form allows you to work with the housing applications and housing leases for a student.

The tasks you can accomplish with this form include:

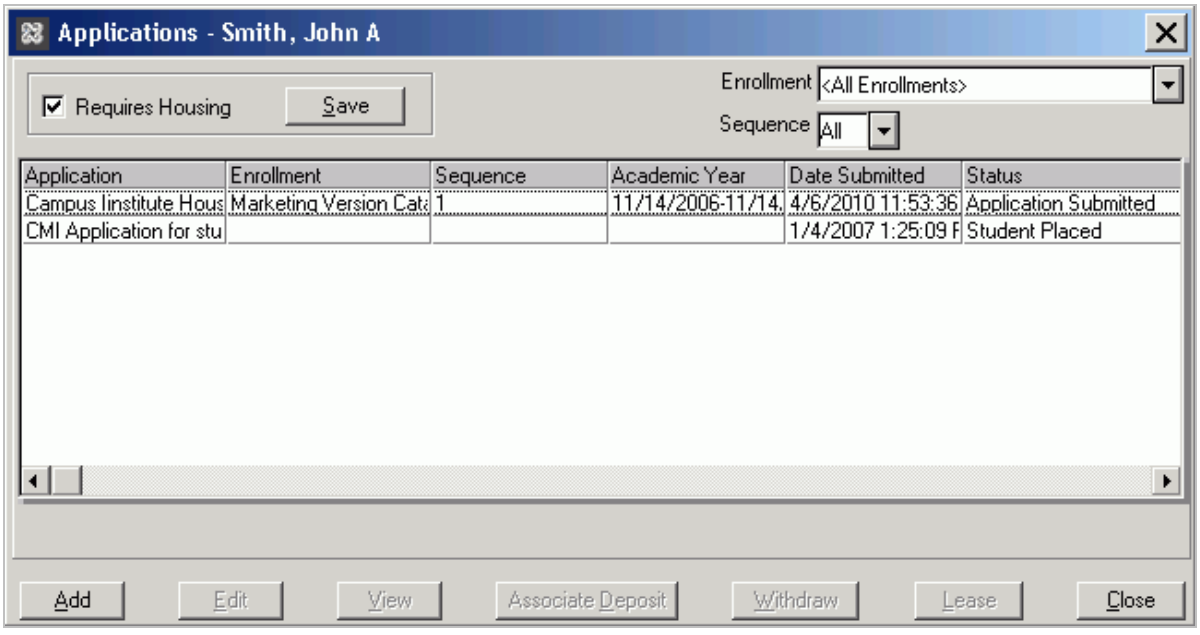
- Add or Edit a housing application for a student
- Accept housing deposits without student filling housing application
- View a housing application submitted by a student
- Withdraw a housing application submitted by a student
- View room or roommate information for a lease
- Generate a charge schedule for a lease
- View or edit a charge schedule for a lease
- Bill outstanding charges for a lease
- Print a charge schedule for a lease
- Print a lease
- Edit a housing lease
- Attach documents to a lease
- Add an activity to a lease
- Change the room assigned to a student
- Renew a housing lease
- Search Applications

Working with Housing Applications

See also Housing Applications, Housing Deposits, Post Rent Charges, and Move Out or Renewal.

To work with the housing applications for a student:

1. Navigate to **View > Housing > Application/Lease**. The housing applications submitted by the student are listed. Use the **Enrollment** and **Sequence** fields to filter the housing applications.



2. Saving a Housing Application enables the **Requires Housing** check box. The change in the Requires Housing

status for a student is also reflected on the student's Housing Information form, and vice-versa.

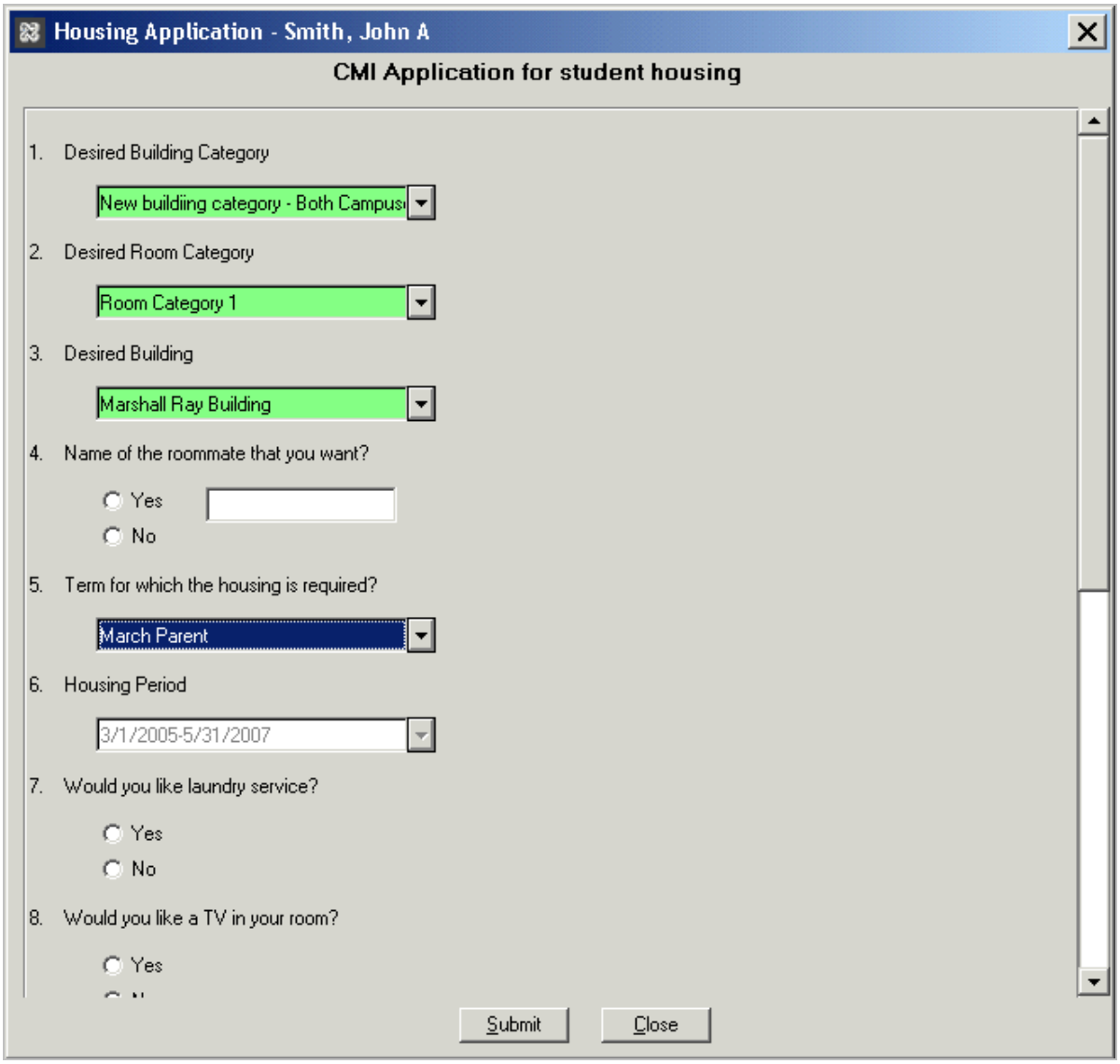
3. Select add, edit, view, associate a deposit, withdraw, lease, or **Close** on the bottom of the form.

To view a student's housing application:

Select a housing application from the Applications form, and click **View**. The housing application as submitted by the student is displayed in read-only mode.

To add a housing application for the student:

1. Click **Add** on the Applications form. The active housing application associated with the student's campus is displayed.



2. Enter the answers for various questions in the housing application.

Important note before you begin: If the ampersand (&) and/or quotation mark (") are entered into the Housing Application text fields, the application cannot be saved. If these characters are used, a message prompts you to avoid using them.

Note: When entering a Housing Application that is configured with a question asking for the student's Academic Year, the following rules apply.

- For the degree seeking student, the Academic Years pertaining to the selected enrollment is displayed. Select the corresponding Academic Year(s) that the Housing Application pertains to.
- For the non degree seeking enrollment student, once you select the student's enrollment on the housing application, the Academic Years is grayed out. CampusNexus Student automatically assigns the start date and end date based on the enrollment's expected start date and expected graduation date.

3. Click **Submit**.
4. Click **Close**.

   The added housing application is now listed on the Applications form.

To edit a housing application for the student:

1. Select a housing application from the list on the Applications form, and click **Edit**. The housing application as submitted by the student is displayed.
2. Make the required changes in the housing application.
3. Click **Submit** to resubmit the housing application.
4. Click **Close** to close the form.

   The added housing application is now listed on the Applications form.

To withdraw a housing application submitted by the student

1. Select an application from the Applications form, and click **Withdraw**. A confirmation box is displayed.
2. Click **Yes** to confirm withdrawing the housing application. The status of the housing application is set to **Withdrawn**.

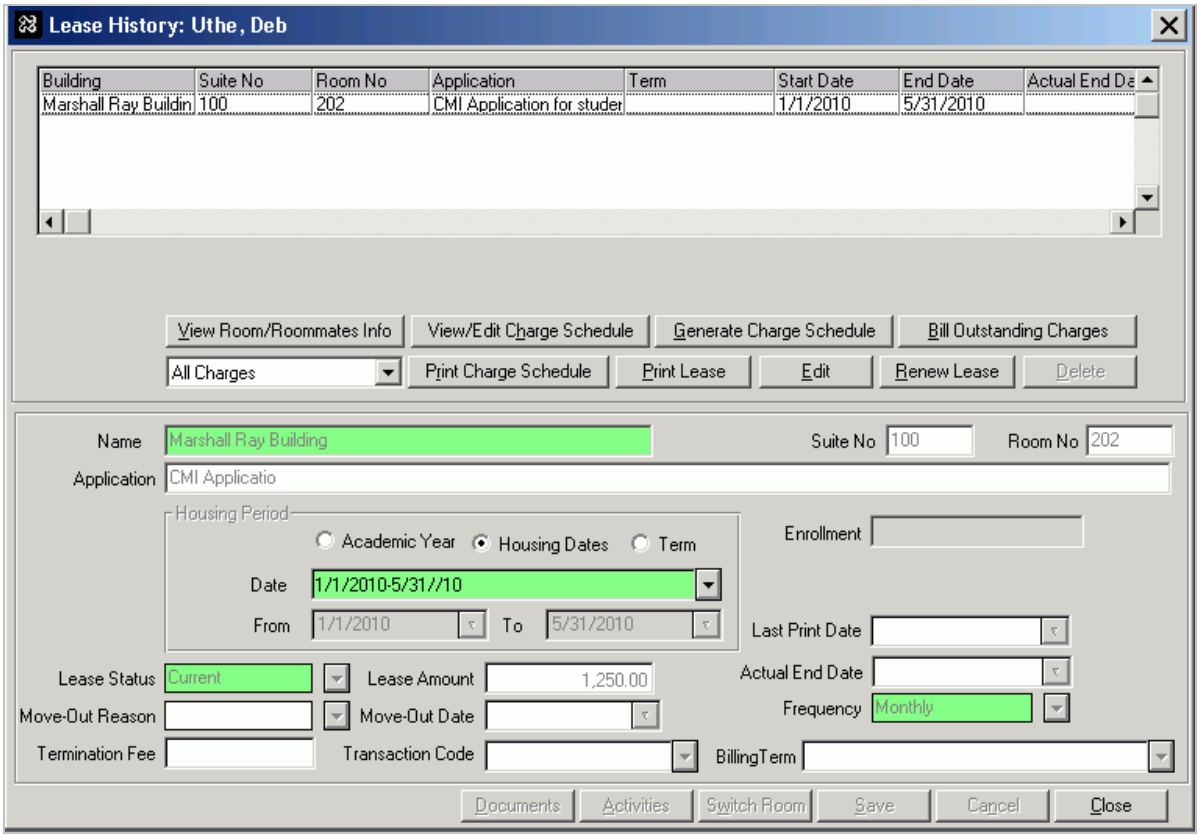
   Note: If the status of the housing application being withdrawn is **Application Being Processed**, CampusNexus Student checks if a lease was created (with the status of **Pending**) for the housing application. If this is the case, the lease related to the housing application is deleted when the application is withdrawn.

Working with Housing Leases

To work with housing leases for a student:

1. Navigate to **View > Housing > Application/Lease**. The housing applications submitted by the student are listed.
2. Select a housing application from the list and click **Lease**. The Lease History form for the selected housing applic-

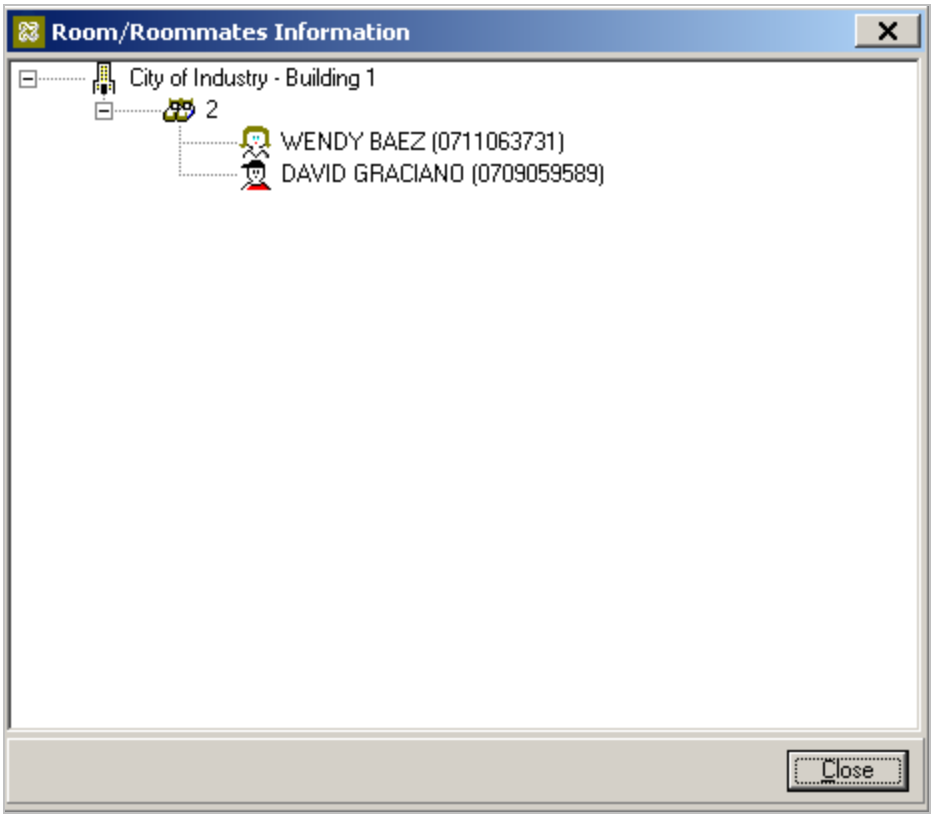
ation is displayed.



The Lease History form displays all lease(s) that have been associated with the selected housing application.

To view room/roommate information for a lease:

1. Select a lease from the Lease History form, and click **View Room/Roommates**. The Room/Roommate Information form is displayed. Room/roommate information can be viewed only for active leases.



The tree structure displays the building, the suite, the room, and the roommate(s) assigned to the student in his or her lease. When viewing roommate information for a particular student, CampusNexus Student displays information of all the rooms in that suite, in addition to the student's room information. All building, room, suite, student's name, and gender information is displayed for the suite.

To generate the charge schedule for a lease:

1. Select a lease from the Lease History form, and click **Generate Charge Schedule**. A dialog box is displayed, indicating that the charge schedule has been generated.
2. Click **OK** to close the dialog box.

   There are three system-defined status for a charge schedule:

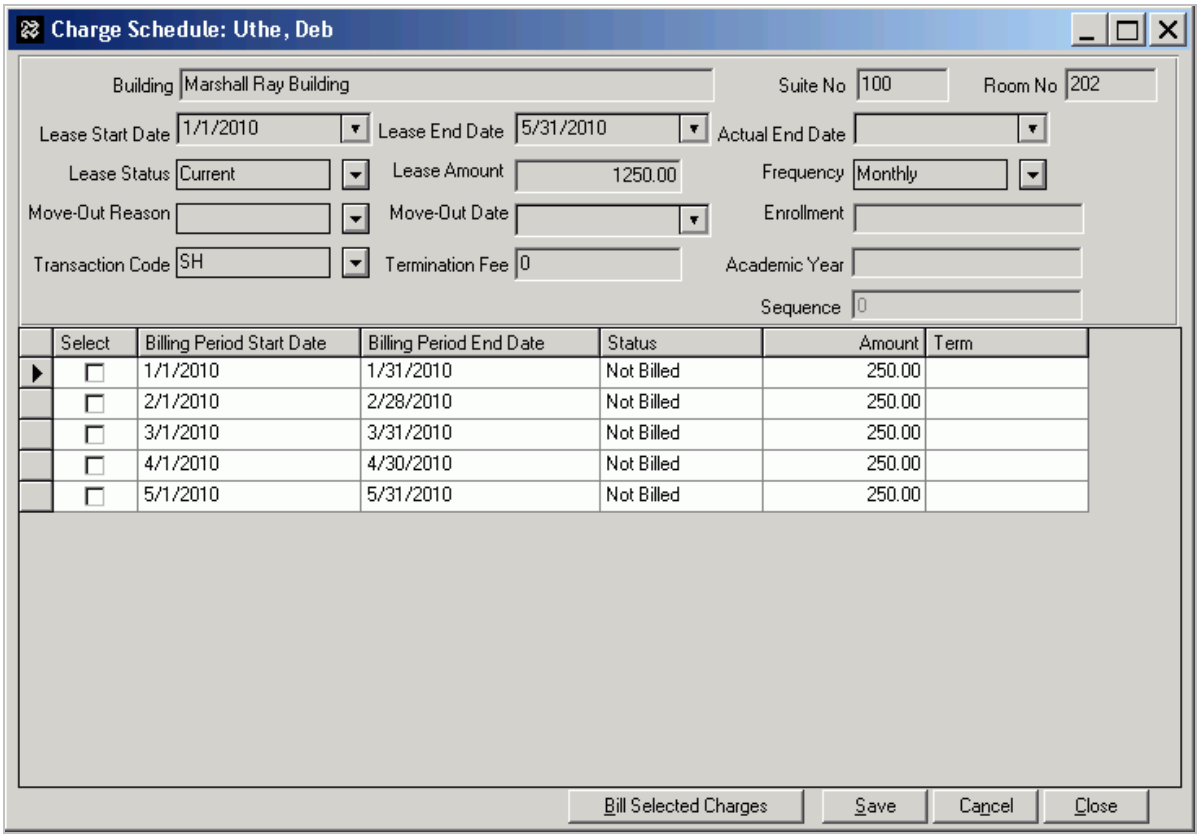
   - Not Billed
   - Billed
   - Pending

CampusNexus Student assigns an appropriate status to a charge schedule depending on the billing status of the lease.

Note: If you re-generate an existing charge schedule by clicking the **Generate Charge Schedule** button, all charges with the status of **Billed** or **Pending** are not generated again.

To view/edit charge schedule for a lease:

1. Select a lease from the Lease History form, and click **View/Edit Charge Schedule**. The Charge Schedule form is displayed.



Note: The **View/Edit Charge Schedule** button on the Lease History form remains disabled until the charge schedule for a student is generated for the first time.

Note: If CampusNexus Student is set up to not require a term (Setup > Student Accounts > Require Term Codes), housing charges may be billed without a term.

2. Specify/change the relevant information in the various fields on the Charge Schedule form. The **Billing Period Start Date** and **Billing Period End Date** fields are not editable on this form, because these values are associated with the payment plan when you generate the charge schedule for the lease.
3. The value in the **Amount** field can be edited, if the charge has not been billed, i.e., the status of the charge is **Not Billed**.
4. To bill a charge, select the corresponding check box, and click **Bill Selected Charges**. The status of the charge is changed to **Billed**.
5. Click **Save** to save the changes.
6. Click **Close** to close the form.

To bill outstanding charges for a lease:

1. Select a lease from the Lease History form.
2. Click **Bill Outstanding Charges**.

To print the charge schedule:

1. Select a lease from the Lease History form.
2. To the left of the **Print Charge Schedule** button is a list box which allows you to choose whether to print a charge schedule containing **All Charges** or **Outstanding Charges**.

3. Click **Print Charge Schedule** .

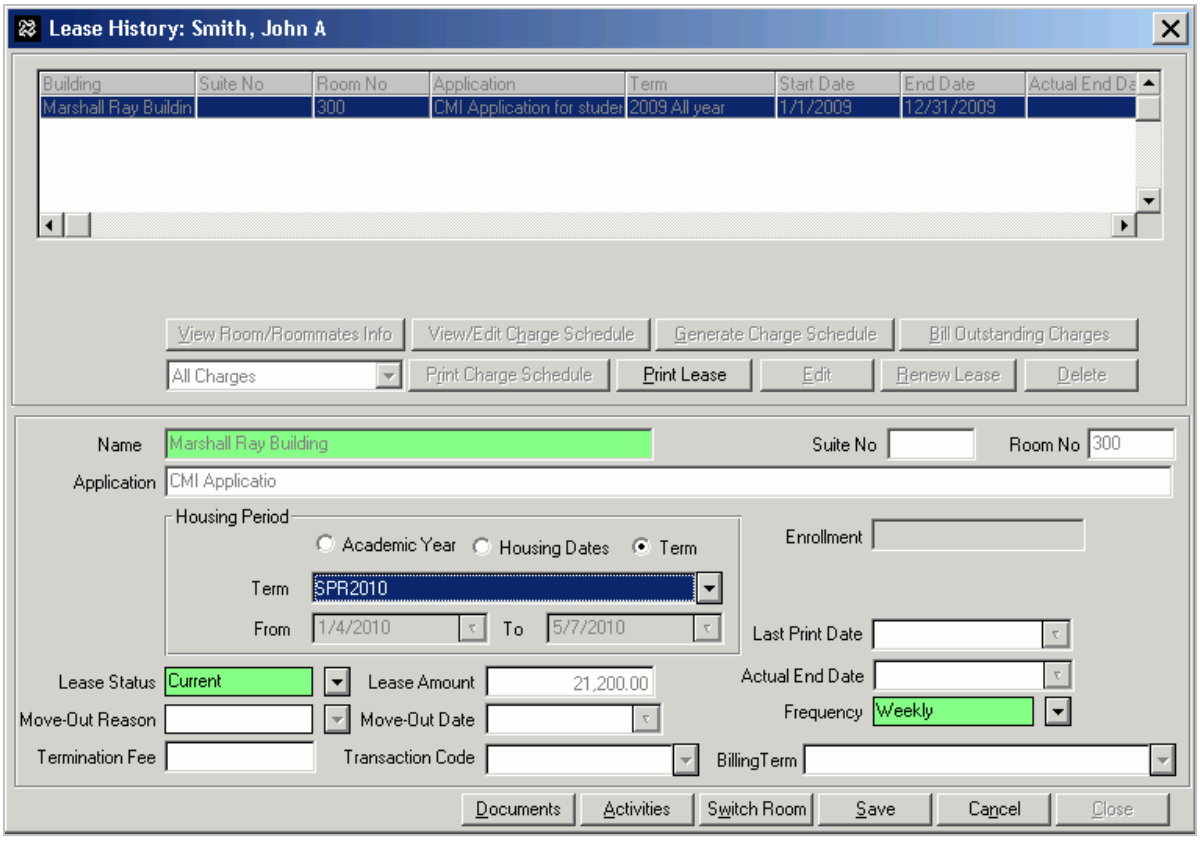
To Print a lease:

1. Select a lease from the Lease History form.
2. Click **Print Lease**.
3. The **Last Print Date** field is updated with the date on which the lease was printed.

   Note: The Last Print Date is reset if a room change is made.

To edit the housing lease for the student:

1. Select a lease from the Lease History form, and click **Edit**. The fields showing the lease details at the bottom of the form become active.



2. The Housing Period may be one of **Academic Year**, **Housing Dates**, or **Term**. Depending on the Housing Period

in use, as indicated by the Radio Buttons, the list box used to select a housing period may be labeled **Academic Year**, **Date**, or **Term**. When a housing period is selected, the **From** and **To** dates are populated with the correct information.

Note: The Housing Period fields may not be edited unless the individual accessing the form has been given individual or group access allowing them to edit housing period dates on a lease.

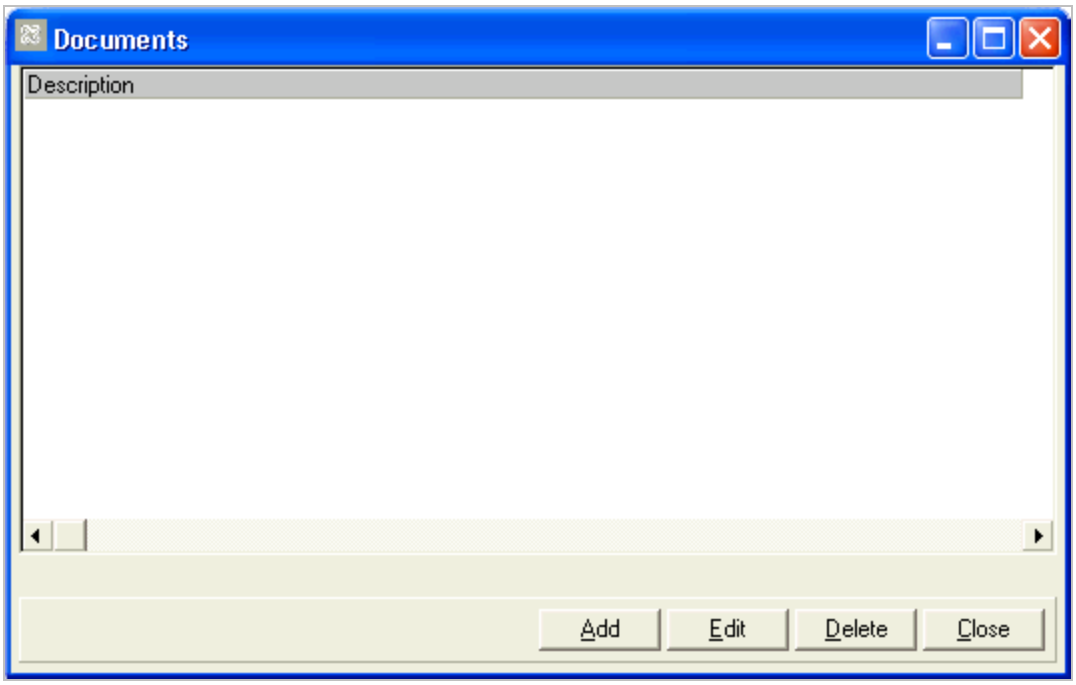
3. The status of other fields while editing a lease is given below:
   - Not Editable: **Building**, **Suite No**, **Room No**, **Application**, **Lease Amount**, and **Transaction Code**.

     Note: The lease amount is a calculated field, which depends on the room rent and the duration of the lease.
   - Editable: **Actual End Date**, **Status**, and **Frequency**.

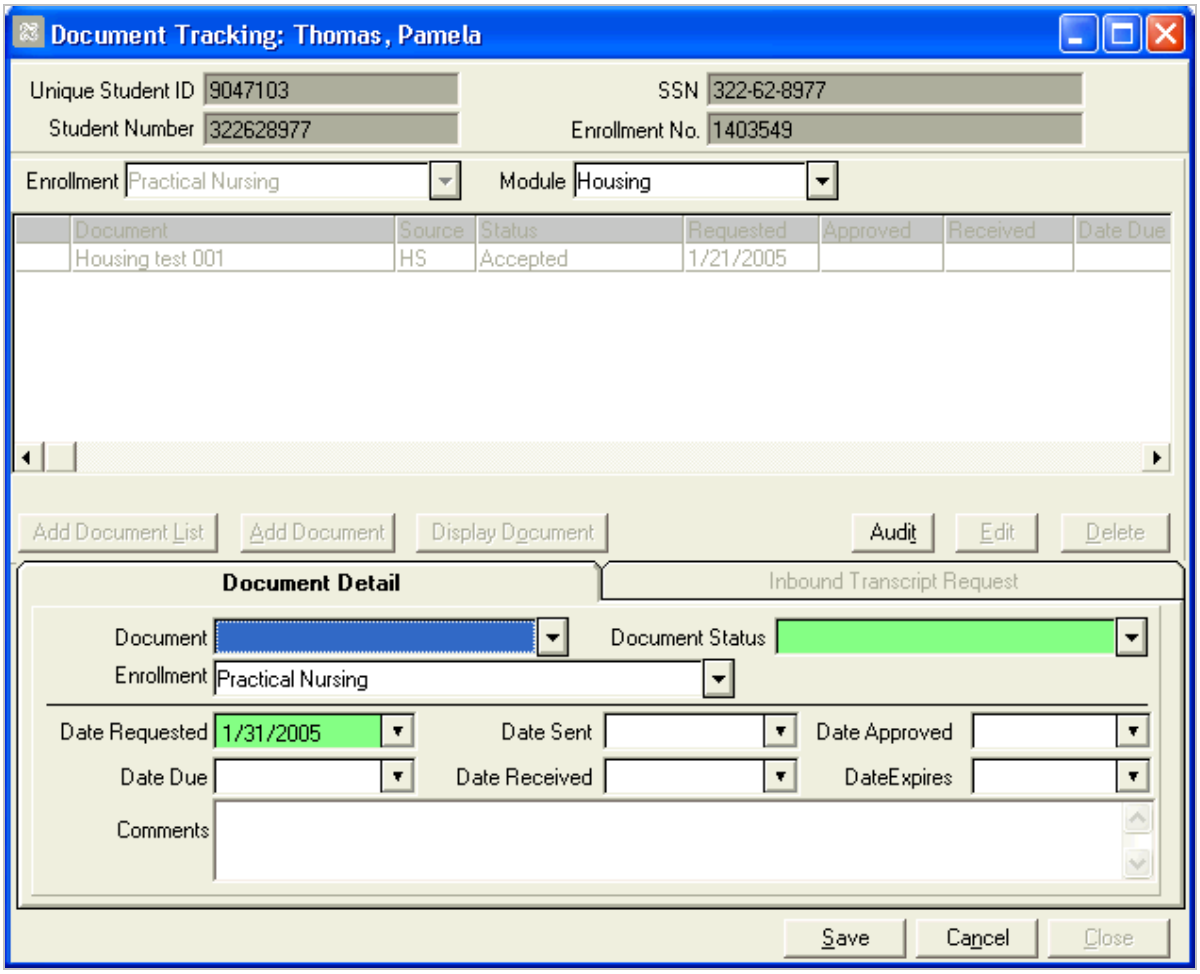
     Note: If you change the lease status to Expired or Lease-Broken, CampusNexus Student inserts the current date into the **Actual End Date** field. You can change the date entered by CampusNexus Student if required.
   - Editable only while setting the lease status to **Expired** or **Lease Broken**: **Move-Out Reason**, **Move-Out Date**, and **Termination Fee**. Once the status is saved, these fields are not editable and cannot be changed.
   - Select the **Termination Fee Subsidiary Code** from the list of all subsidiary associated with the selected transaction code. This field is populated only when the billing transaction code selected for termination fee is associated with single or multiple subsidiaries.
4. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

To attach documents to a lease:

1. Select a lease from the Lease History form, and click **Edit**.
2. Click **Documents**. The Documents form is displayed. This form lists the documents attached to the lease (if any).



3. Click **Add** on the Documents form. The Document Tracking form for the student is displayed.



4. Select the document to attach from the **Document** list on the **Document Detail** tab on this form, and provide a status for the document from the **Document Status** list.
5. Click **Save** to attach the document.
6. Click **Close** to close the form. The attached document can be seen listed in the Documents form.
7. Click **Close** to close the form.

To add a contact manager activity to a housing lease:

1. Selects a lease from the Lease History form, and click **Edit**.
2. Click **Activities**. The Activities form is displayed. This form lists the activities already added to the lease (if any).
3. Click **Add** on the Activities form. If the lease start date is in the future (i.e. the lease start date is not the current date or a past date) the Days Before Start of Activity form is displayed. Enter the number of days before the start of the activity, and then click **Next**.
4. The Activity form for the student is displayed now.
5. Set the details of an activity using this form.
6. Click **Save** to add the activity to the lease.

7. Click **Close** to close the form.

   The added activity can be seen listed in the Activities form.

Note: The added activity also appears in the Activities window (**View> Contact Manager > Activity**) for the student.

To change the room assigned to a student

To change the room assigned to a student in his/her housing lease, see the Help topic located at View Menu (Student Bar) > Housing > Switch Rooms.

To renew a housing lease:

1. Select a housing lease from the Lease History form, and then click **Renew Lease**. The **Renew Lease** button is active only if the student application selected is applicable on the current date.
2. The status of the lease being renewed changes to 'Expired' and a new lease is created. The fields showing the lease details become active.

   Lease Details

Field	Default Value	Editable?
Building	Old lease value	No
Suite No.	Old lease value	No
Room No.	Old lease value	No
Application	Old lease value	No
Academic Year/Date/Term	Old lease value, if applicable	Yes
From	Current date	Yes
To	New end date for the new lease	Yes
Actual End Date	No value	Yes
Status	Current	Yes
Lease Amount	Old lease value. The default value is the original lease amount. To change this amount, you must change the charges and re-generate the schedule.	No
Frequency	Old lease value. The default value is the original lease frequency. To change this amount, you must change the frequency and re-generate the schedule.	Yes
Move-Out Reason	No value	No
Move-Out Date	No value	No
Transaction Code	No value	No
Termination Fee	No value	No

3. After changing these values, click **Save** to save the lease.

Accept housing deposits without student filling housing in application

Navigate to **View > Housing >** Deposits. Fill in all required fields. The deposit may be processed even when an application is not selected. Click the **Save** button to retain deposit information. Verify that the system allowed the acceptance of a housing deposit without an application submission by navigating to View > Housing > Application/Lease and accessing the 'Applications' form for the student. If the 'Requires Housing' check box is selected, then the student still needs to fill/submit an application even though the deposit was processed.

After the student fills/ submits an application, you can associate the housing deposit with the application or any existing application whose status is "Application Submitted", "Application Being processed" or "Placed". Navigate to View > Housing > Application/Lease, select an application with one of the statuses listed above and click the **Associate Deposit** button. The Associate Housing Deposit form is displayed listing all housing deposit records for the student. Select the desired housing deposit listing and click the **Save** button. The system will associate the selected housing deposit with the application.

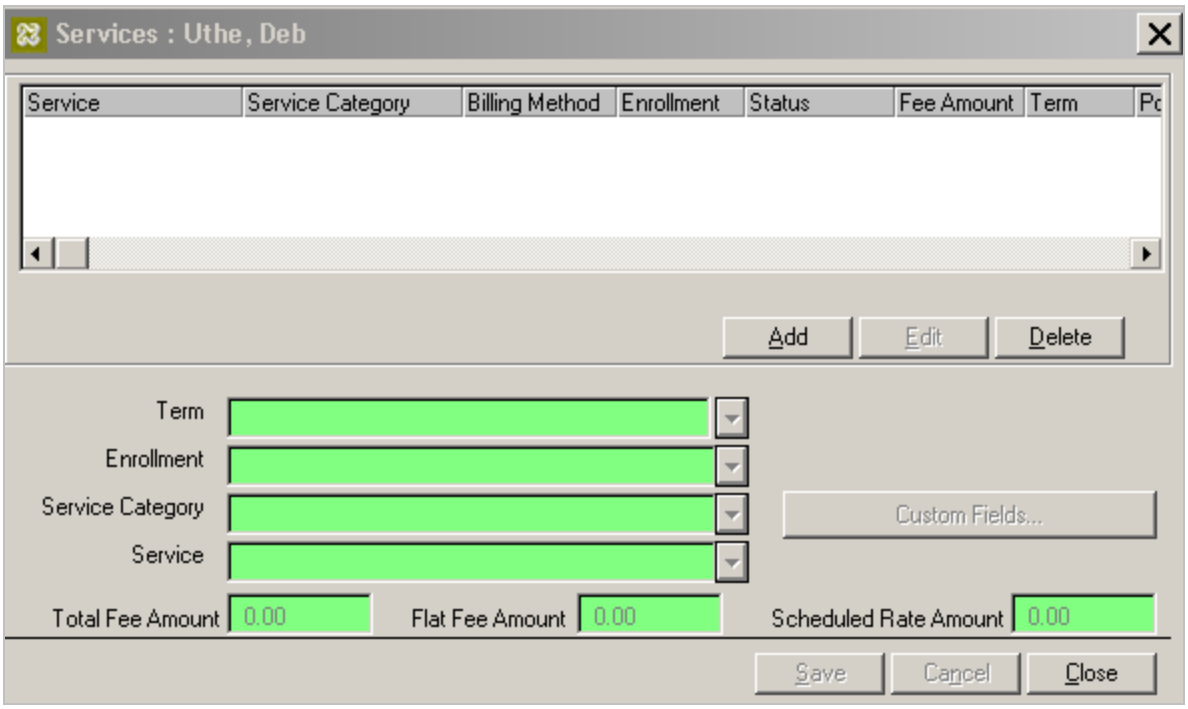
Services

To assign the cost of a housing related service to a student for subsequent billing, it is necessary to assign the service to the student for the *Term*, *Enrollment*, *Service Category* and specified *Service*. The Service Category and Services must have been previously defined through entries created in the Student Services Lists. Services are grouped by *Service Categories*. For example, Cable TV or Parking fees can be grouped in the *Housing Service Category*. Service Categories must be set up before Services can be assigned to Service Categories.

The Services screen provides the ability to indicate the specific services that a student will receive. For each service the fee specified for that service will be placed on the student's ledger card for subsequent posting.

To add a service for a student and place the specified charge on the student's ledger:

1. Select the student to whom you want to assign the service.
2. Navigate to **View > Housing > Services**.



3. To add a service, click **Add**.
4. Select the **Term** in which the service will be rendered.
5. Select the appropriate **Enrollment**.
6. Select the **Service Category**. Service Categories might include items such as Housing or Meal Plans.
7. Select the **Service**. When this is done the **Total Fee Amount**, **Flat Fee Amount**, and **Scheduled Rate Amount** fields will be filled in from the information on file for that service.
8. Click **Save**. The Service entry will be saved and displayed on the grid at the top of the form.

The cost of the Service will be placed on to the Student's Ledger Card with a post status of 'Pending'.

An existing service entry may be edited by highlighting the service on the grid and clicking on the **Edit** button.

An existing service entry may be deleted by highlighting the service on the grid and clicking the **Delete** button. A dialog box will appear requesting confirmation of the deletion. After confirmation, the service entry will be deleted.

Once the charges associated with a service have been posted to the student's ledger, the post status for this service will be changed to 'Posted'. Once the charges have been posted, the service may not be edited.

Note: Services can also be applied to more than one student at a time. **Daily > Student Services > Batch Assign Services** launches a three-step wizard that enables users to associate a service to multiple students. Filtering criteria are Start Date, Program Version, Status, and Charge Amount.

Custom fields can be created to accommodate special services for your campus or campuses. For more information, see the Custom Fields for Student Services topic.

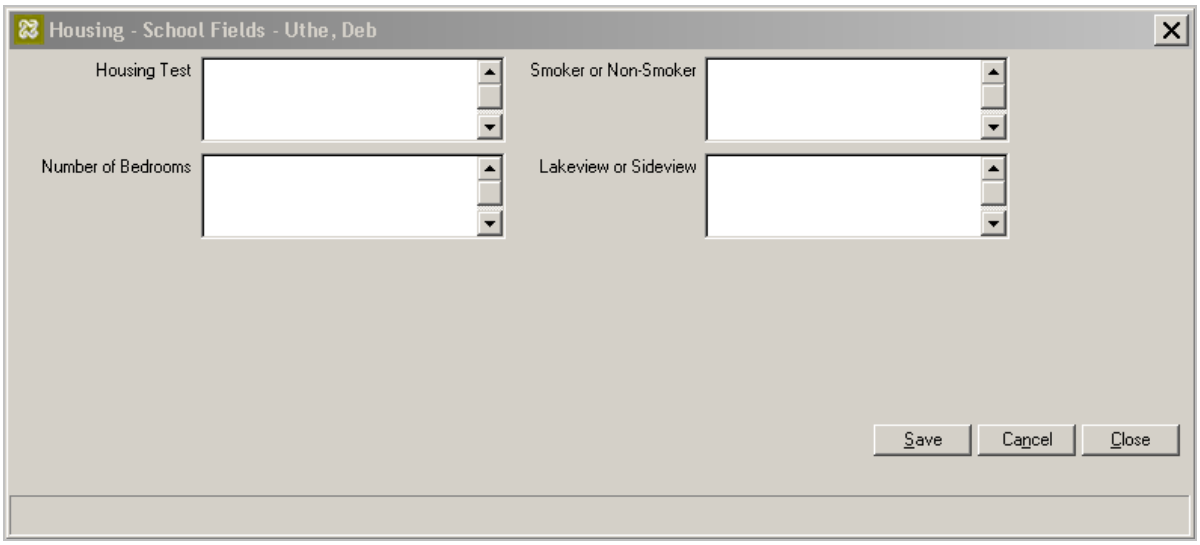
School Fields - Housing

School-defined fields are set up by your system administrator to collect information that is not required by the generic CampusNexus Student application. (See Setup > School Defined Fields.) The fields are organized by department during setup. At least one department has the authority to change each field.

Some fields may be viewed but not edited in your department. A field may be flagged as confidential by the originator, i.e., not viewable outside of the department that is using it. For instance, if a field can only be viewed or edited by the Housing Department, it will only be visible when the form is opened from View > Housing > School Fields. If you do not have access to that menu option, you will not see this field.

To view or edit school fields:

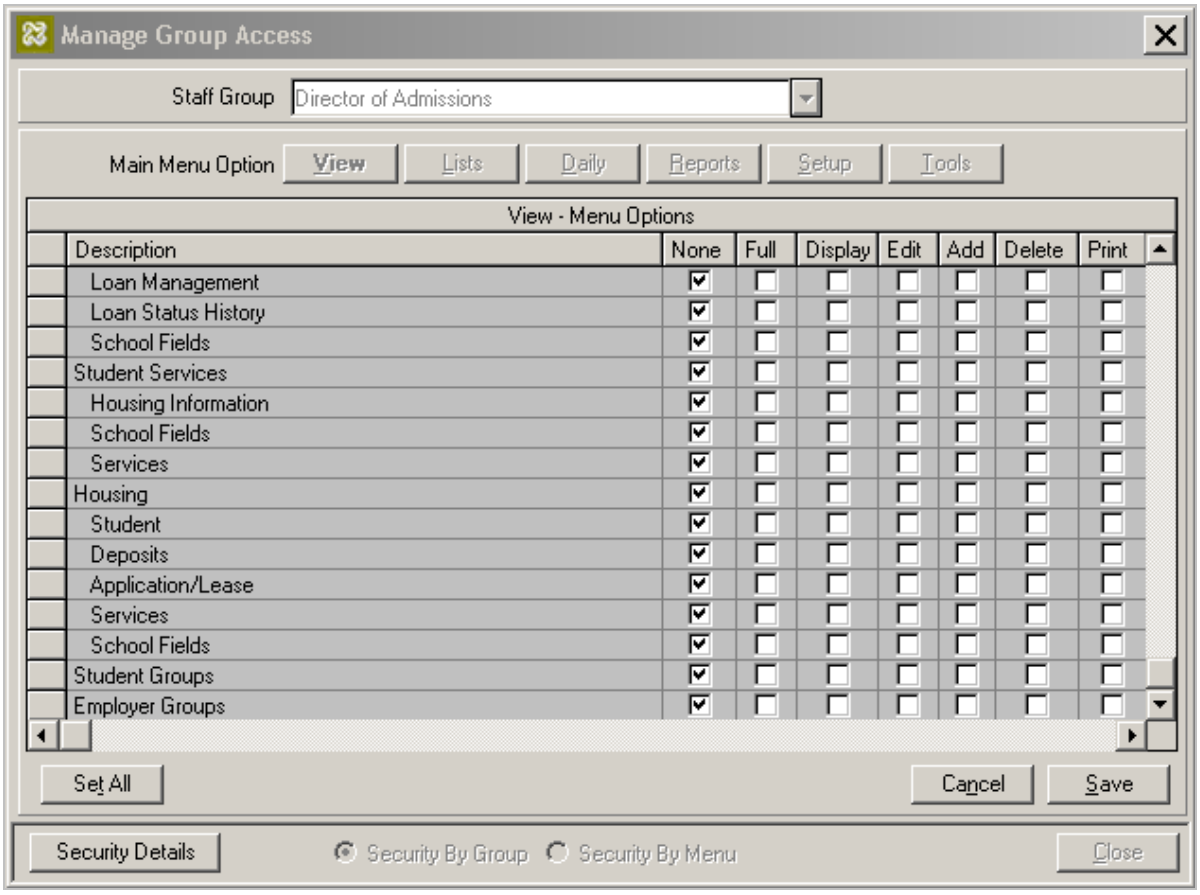
1. Navigate to **View > Housing > School Fields**. The School Fields form is displayed.



2. Click on or tab to a field that you want to change. Select an option or enter data to edit the field.

   The fields are displayed in edit mode (white background) if your department has been given permission to change the data. Fields that are "dimmed" cannot be changed. Fields that are listed but are gray and show no data are simply not to be filled in yet by the staff member responsible for doing so.

   Note: To provide users with security permissions to this form, navigate to **Setup > Security** (Staff Group drop-down) > **View** (button) > **Housing** (Description section) > **School Fields**.



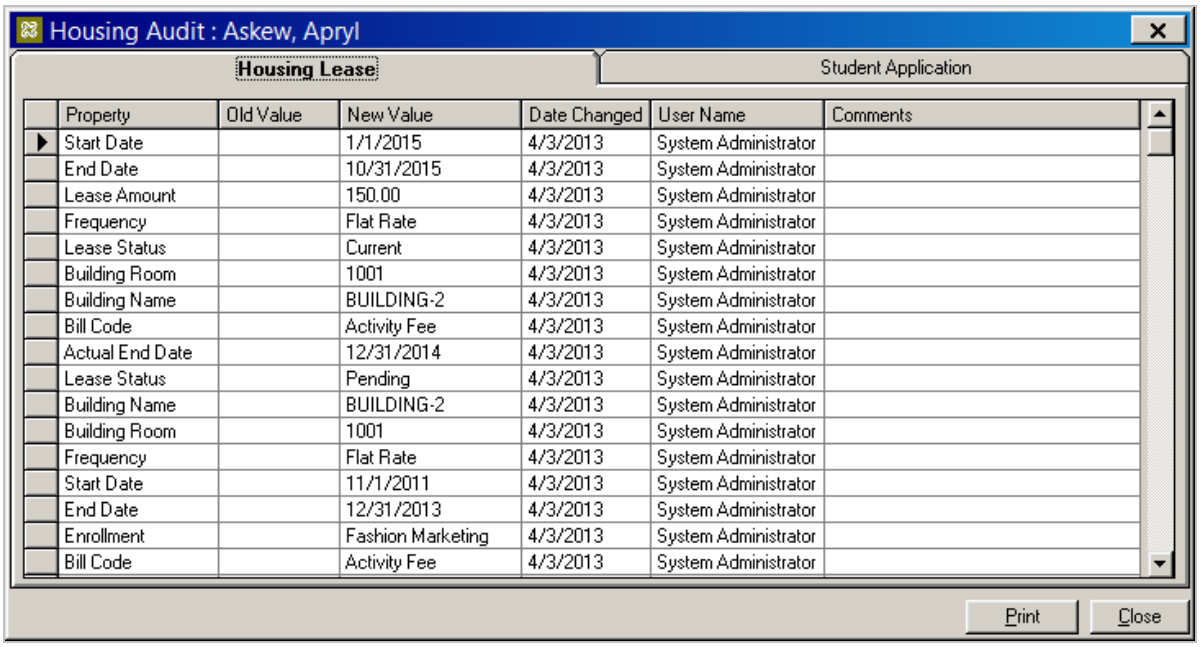
3. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. .

Audit

The Audit form displays changes to housing information. Any changes made to a student's lease(s) as well those made to a student's housing application(s) are displayed.

To view the Housing Audit:

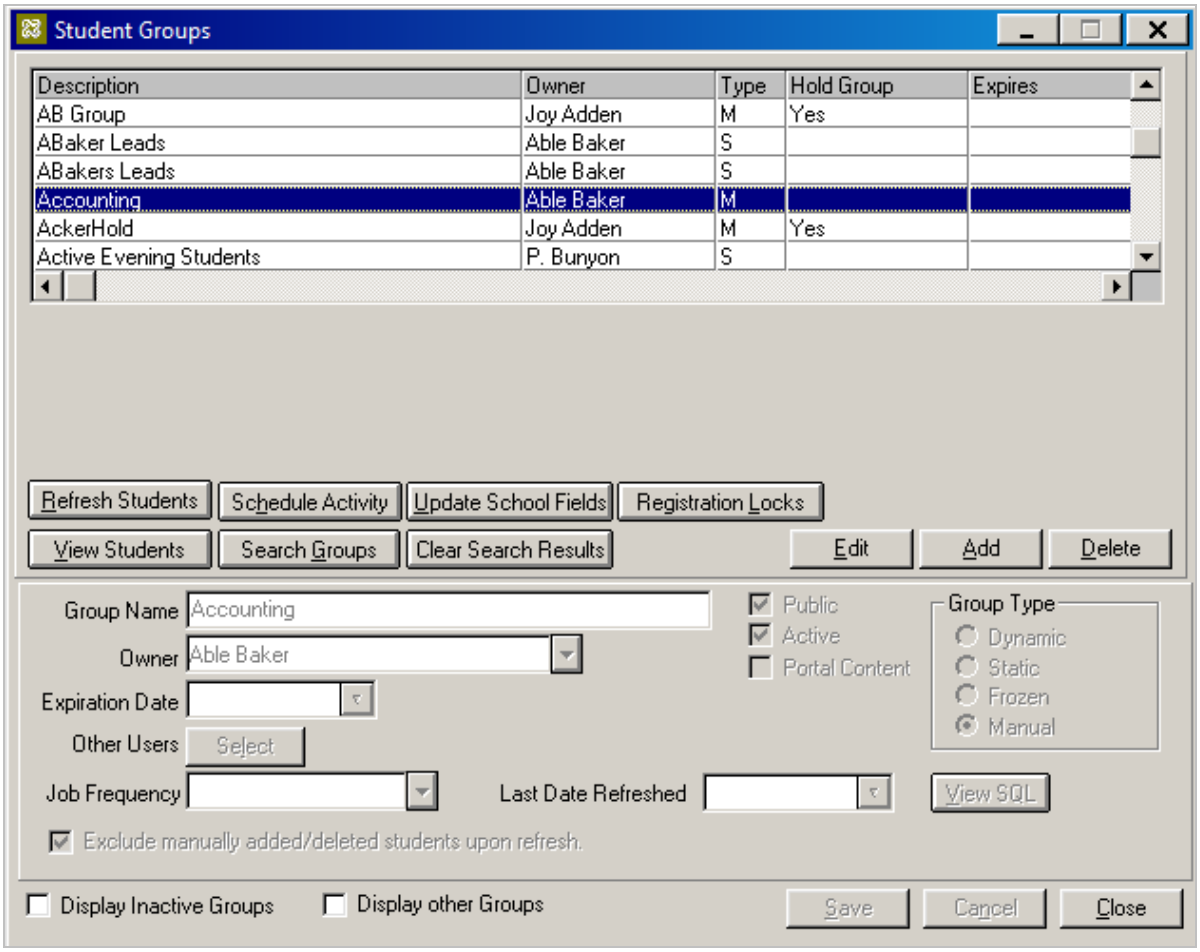
1. Select the student for whom you want to view the housing change data.
2. Navigate to **View > Housing > Audit**.
3. Select the tab containing the desired information.



4. Click **Print** to print the data or **Close** to close the form.

Student Groups

Student Groups serve to organize a list of students who have one or more characteristics in common. They may all have the same status, or they may be in the same program, or just about anything else you can think of.



Note: The Update School Fields button is only enabled if you have 'View' permissions for Daily > Contact Manager > Batch Update School Fields. Clicking this button opens the Batch Update School Fields form.

The Registration Locks button is only enabled if you have 'View' permissions for View > Academic Records > Registration Locks. A tool tip stating Configure Registration Locks is displayed when you hover over the Registration Locks button. Clicking this button opens the Registration Locks form.

A student group can be created as follows:

1. through lists of students on a report,
2. through a search of student master records,
3. by manually adding a new group and selecting students to be members of it

The process of creating a student group via a report is described in the topic Report Viewer Controls. The process of creating a group via a search is described under Find > Student > Search.

Creating a Student Group from a Report

The process of manually creating a student group is described later in this topic.

You can view the list of students who are members of a group, add students to a group, and remove students from a group. You can schedule activities for the members of the group as a whole. (To schedule an activity for an individual member of the group, you must do so through the View menu, Contact Manager, Activities function.)

A group is "owned" by the user who creates it. Ownership can be transferred from one owner to another. Once ownership of a private group is transferred, the previous owner no longer has the right to see the group.

A group can be Public or Private. A Public group can be viewed and edited by persons other than the one who created the group. A Private group can be viewed and edited only by the person who created it, or those authorized to do so by the group's creator. A group that is formed by saving a search or running a report is typically designated as Private (not Public) until the owner intentionally sets it to be Public. A manually created group defaults to Public. The person creating the group must clear the Public option if necessary to keep it private.

A group can be active or inactive as required by the owner.

Adding and Deleting Group Members

If the group is a manual group type and it is "Public", any user with appropriate access rights can add and delete students. Only the owner of a Private group or the system administrator can perform maintenance, such as adding and removing students.

The owner of a Private group or the system administrator can add or delete staff members who have access to that group. When the Public check box is disabled, the **Other Users Select** button becomes available. Clicking **Select** displays the **Student Group Staff** form.

Note: Additional users can only add/remove students from the group from the student's **View** menu, not from their **Manage Student Groups** form.

The authorized user can search for staff members and add them to the list of Selected Staff for the group. The **Search** button becomes available when the user enters data in any of the search criteria fields or selects a Staff Group from the drop-down list.

Display Inactive Groups

Select this check box to view inactive groups. The default view of the Student Groups form lists only student groups that are active.

Display other Groups

The default view of the Student Groups form lists all student groups that the logged-in user owns or has been given permission to edit. Select the **Display other Groups** check box to view public groups not owned by the logged-in user. Note: This applies only to groups that contain students. Empty groups will not be displayed.

Exclude manually added/deleted students upon refresh

This check box provides the following functionality:
If the check box is selected for a group, students who were manually added will not be removed from a static or dynamic group once it is refreshed; students who were manually deleted by a user will not be added back to a static or dynamic group once it is refreshed.

Group Types

Group types can be **Dynamic**, **Static**, **Frozen**, or **Manual**. Dynamic, Static, and Frozen groups are typically formed by saving the results of a search or a report. These group types can be changed from one type to another, including Manual. The Manual type, however, cannot be changed to any of the other types since there are no automatic parameters involved.

Dynamic Group

The list of students in a **dynamic group** changes when a student qualifies for the group by virtue of a change in the variable upon which the group was selected. For example, if a group is made up of students in the General Management Program Version 2, any student who is enrolled in that version of the program is automatically a member of the group. A student who leaves the pro-

gram is automatically removed from the group. A dynamic group can be changed to a manual group, but once you save it as a manual type, it cannot be changed back to dynamic.

An "Allow Dynamic Groups" option is available in the System setup parameters. If you select **No** for this option, the program will make the Dynamic student group type unavailable when creating new groups. On the Student Groups maintenance form, if the Allow Dynamic Groups option is **No**, the program does not allow the group type to be changed to dynamic. It will display a message, "Dynamic Groups have been disabled by the system administrator". If you select **Yes**, the program will function as described above.

Static Group

A **Static** group is one that once created can be "refreshed" from time to time by clicking **Refresh**. A static group can be changed to a Manual group, but once you save it as a Manual type, it cannot be changed back to Static.

Frozen Group

A **Frozen** group is one that once created cannot be updated. This type of group can be used when you want to compile a list of students that will never change. The students meet a certain criteria on a given date and the members of the group must be retained indefinitely. For instance, you might want a list of students who started on a given date. No one else can qualify for the group except the students who actually started on the given date and you want to track them for some time into the future.

Note the distinction between "Frozen" and "Not Active". A Frozen group is still available for use in the purpose for which it was created. A group that is not Active is no longer available for use.

Manual Group

A **Manual** group is created and maintained by the user. The user can include or remove students from the list at will. You as the user might create an initial list for the group by running a report and then add or remove students from the group as required.

Group Type Change Warning

If you attempt to add or delete a student in a dynamic, static, or frozen group, the program will display a verification message indicating that removing the student from this group will convert the group type to manual. Click **Yes** to continue, **No** to stop the process.

If you answer **Yes** to this message, the group is converted to a **Manual** group type. It no longer behaves as an automatically controlled group type.

Add a Manual Group

To add a manual group:

1. Navigate to **View** > **Student Groups**. The Student Groups form is displayed.
2. Click **Add**.
3. Type a name for the group in the **Group Name** text box.
4. Your name will appear on the **Owner** text box as a default. You can select another name from the drop-down list if necessary.
5. To make the list available to other users, be sure that **Public** has a check mark in the box. The default is to make the group public.
6. To make the list active, be sure that **Active** has a check mark in the box. The default is to make the group active. Additionally, to configure the student groups for Portal filter, the Active check box on the Student Groups

form must be selected.

7. Click **Save** to save the new group. It will be added to the list.

Note: The group is automatically designated as a "Manual" group.

Delete a Group

Only the owner of the group can delete it from the list of groups.

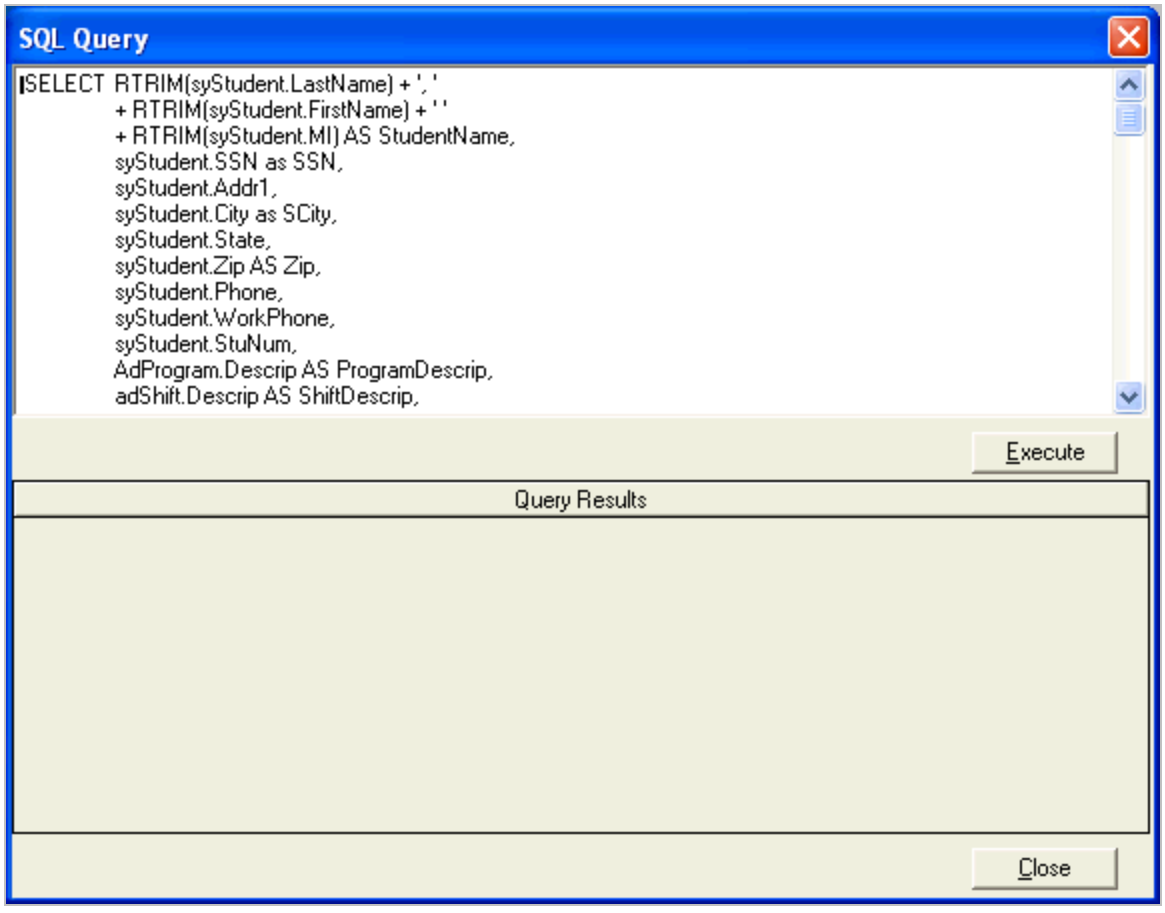
Note that deleting a student group does not remove the students in the group from the CampusNexus Student database. Deleting a student group simply dissolves the symbolic relationship of the students in the group.

To delete a group:

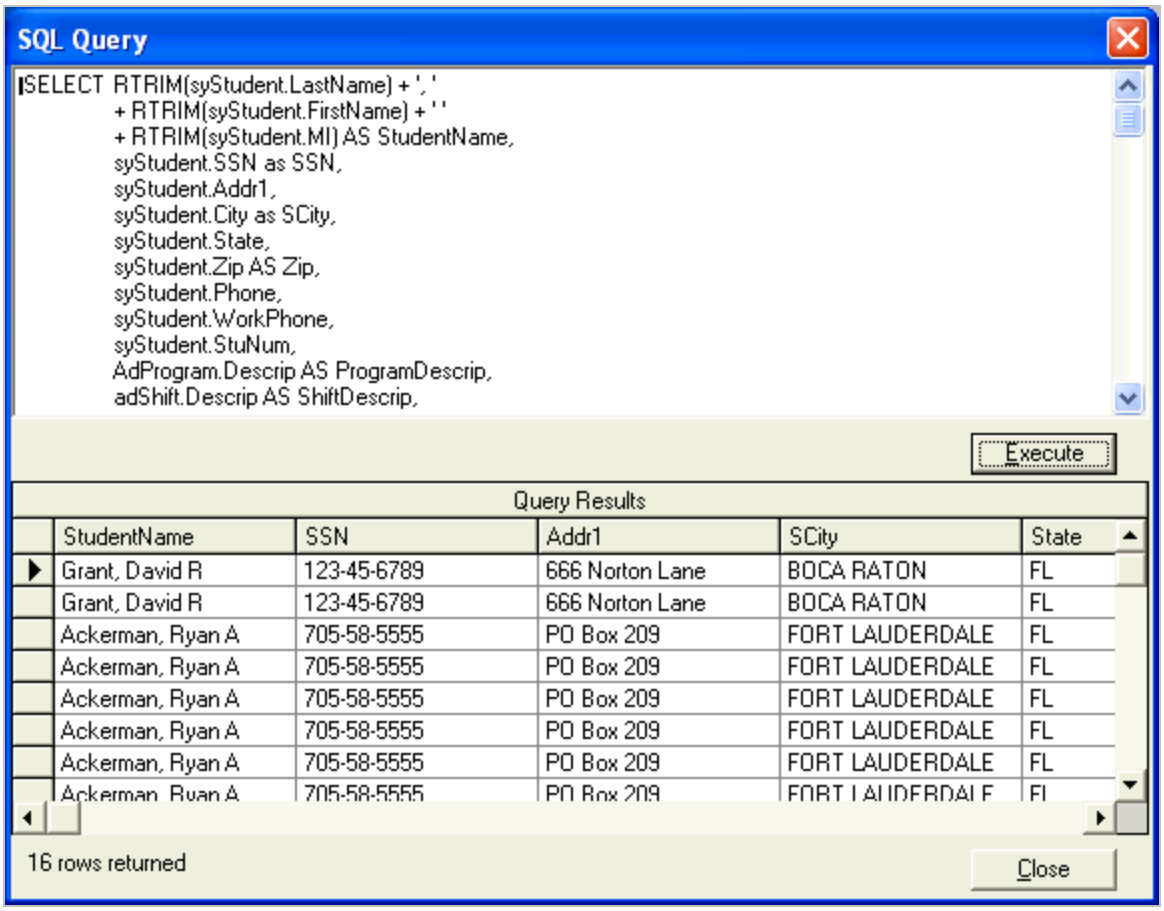
1. Navigate to **View** > **Student Groups**. The Student Groups dialog is displayed.
2. Select (highlight) the group to be deleted.
3. Click **Delete**. Confirm your intention to delete the group.
4. Click **Yes** to confirm the deletion.

View SQL

If you select a group and click **View SQL**, you can see the SQL statement used to create the group.



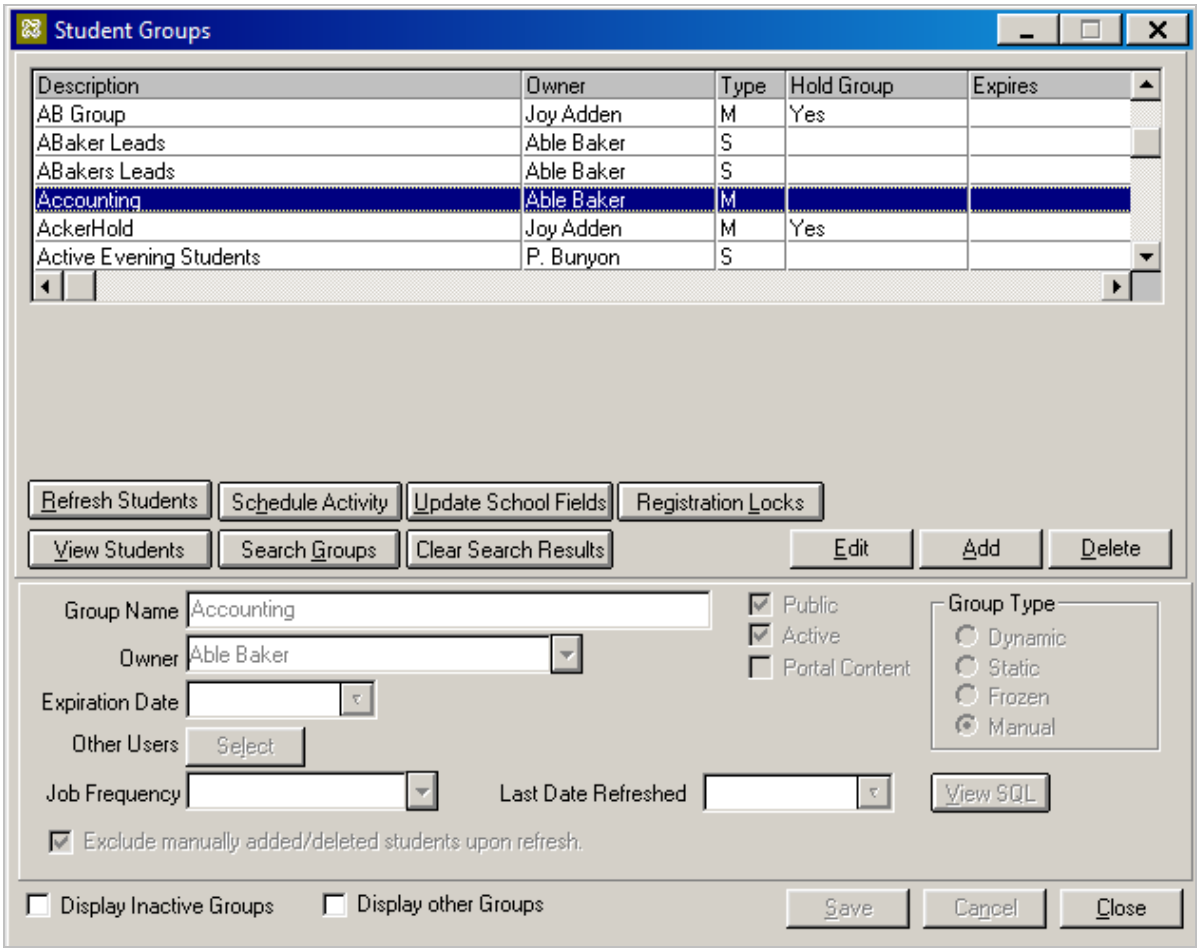
Click **Execute** to execute the query. The **Query Results** form shows all students who are members of the group and detailed information about each.



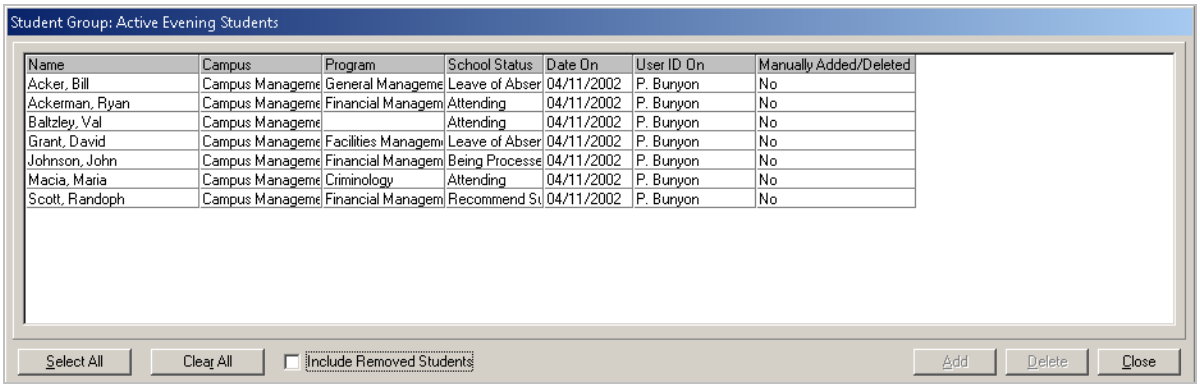
View Students

To see a list of the members in a student group:

1. Navigate to **View** > **Student Groups** (or click the icon on the Toolbar). The Student Groups form is displayed.



2. Select the Student Group for which you want to view the included students.
3. Click the **View Students** button. The Student Group form with members of the group is displayed.



The form could be confusing when it lists students having multiple enrollments. A student could be active in one enrollment and dropped or graduated from another enrollment. The column header that lists the "School Status" is showing the student's status in school (most recent status) as opposed to the student's status in the listed program (i.e., enrollment). In the illustrated example, the student David Grant was added to the list because he was "Dropped" from the "Facilities Management" program but he is shown as "Active" because he is active in another program.

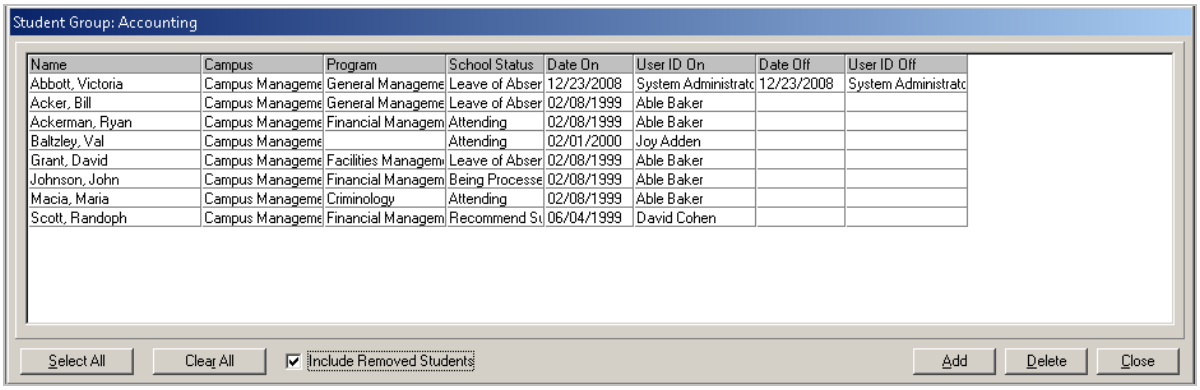
The **Date On** and **User ID On** columns indicate when, and by whom, the student was added as a member of the group.

The **Manually Added/Deleted** column shows you which students were added or deleted manually, as opposed to automatically by the system; this column is only applicable for group types other than Manual.

The **Add** and **Delete** buttons apply if the list is a manual list. If you attempt to add or delete a student in a dynamic, static, or frozen list, warning messages appear about changing the group to a manual group.

Use the **Select All** and **Clear All** buttons to assist you in selecting/clearing students in the list. You may also use the Shift and Ctrl keys for multi-selection.

If the **Include Removed Students** check box is selected, then the two additional columns **Date Off** and **User ID Off** become visible, allowing you to see when, and by whom, those students were removed from the group.



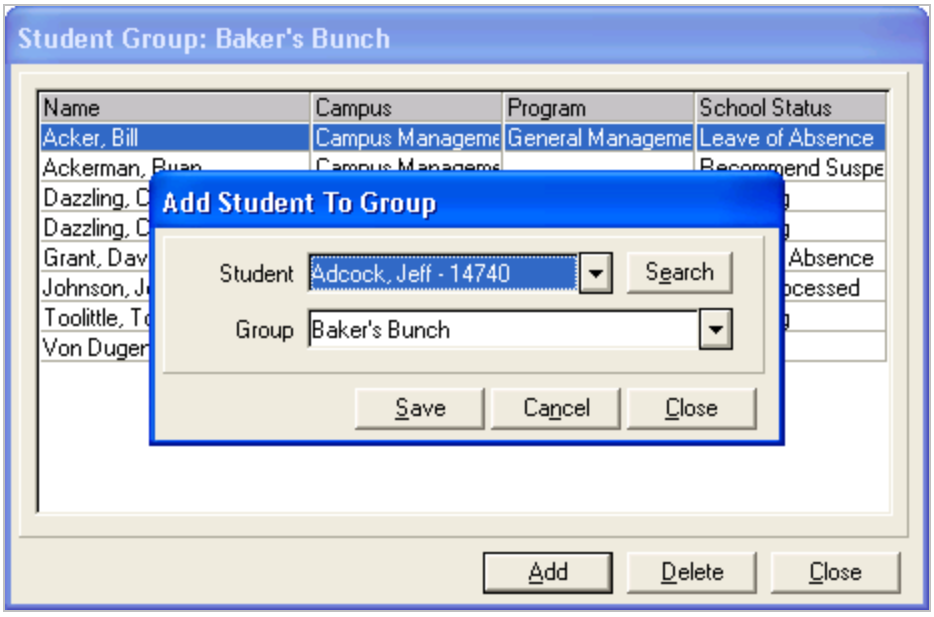
4. Click **Close** to close the form.

Add a Student to a Group

You can manually add students to dynamic, static, and frozen group types; however, CampusNexus Student will warn you that the group will be converted to a manual group type if you do so. A dynamic group is automatically maintained as students meet the necessary criteria for inclusion or exclusion. A static group is maintained when the owner chooses Refresh on the Student Group form. A frozen group is intended to remain unchanged indefinitely. If you add a student to any of these automatically controlled group types, you defeat the purpose of the group.

To add a new student to a manually maintained group:

1. Navigate to **View** > **Student Groups**. The Student Group form is displayed.
2. Select a group and click **View Students**. The list of group members is displayed.



3. Click **Add** to add a new member to the group. The Add Student to Group form is displayed.
4. Select a student from the **Student** list or click **Search** to find the student (or students) to be included in the group.
5. If the group name is not shown in the **Group** text box, select it from the list.
6. Click **Save** to complete the addition of the student to the group.
7. Add Student to Group form: Click **Close** to close the form.
8. Student Group: Click **Close** to close the form.

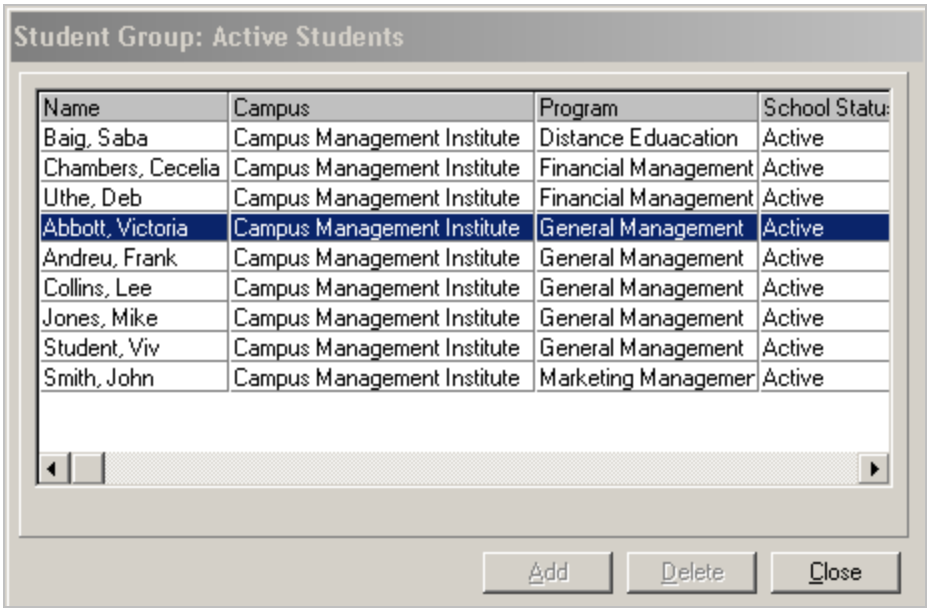
Remove a Student from a Group

A dynamic group is automatically maintained as students meet the necessary criteria for inclusion or exclusion. A static group is maintained when the owner chooses Refresh on the Student Groups form. A frozen group is intended to remain unchanged indefinitely. If you remove a student from any of these automatically controlled group types, you defeat the purpose of the group.

Note: While it is possible to manually remove students from dynamic, static, and frozen group types, the program will warn you that the group will be converted to a manual group type if you do so.

To remove a student from a manually maintained group:

1. Navigate to **View** > **Student Groups**. The Student Groups form is displayed.
2. Select a group from the list, then click **View Students**. The list of group members is displayed.



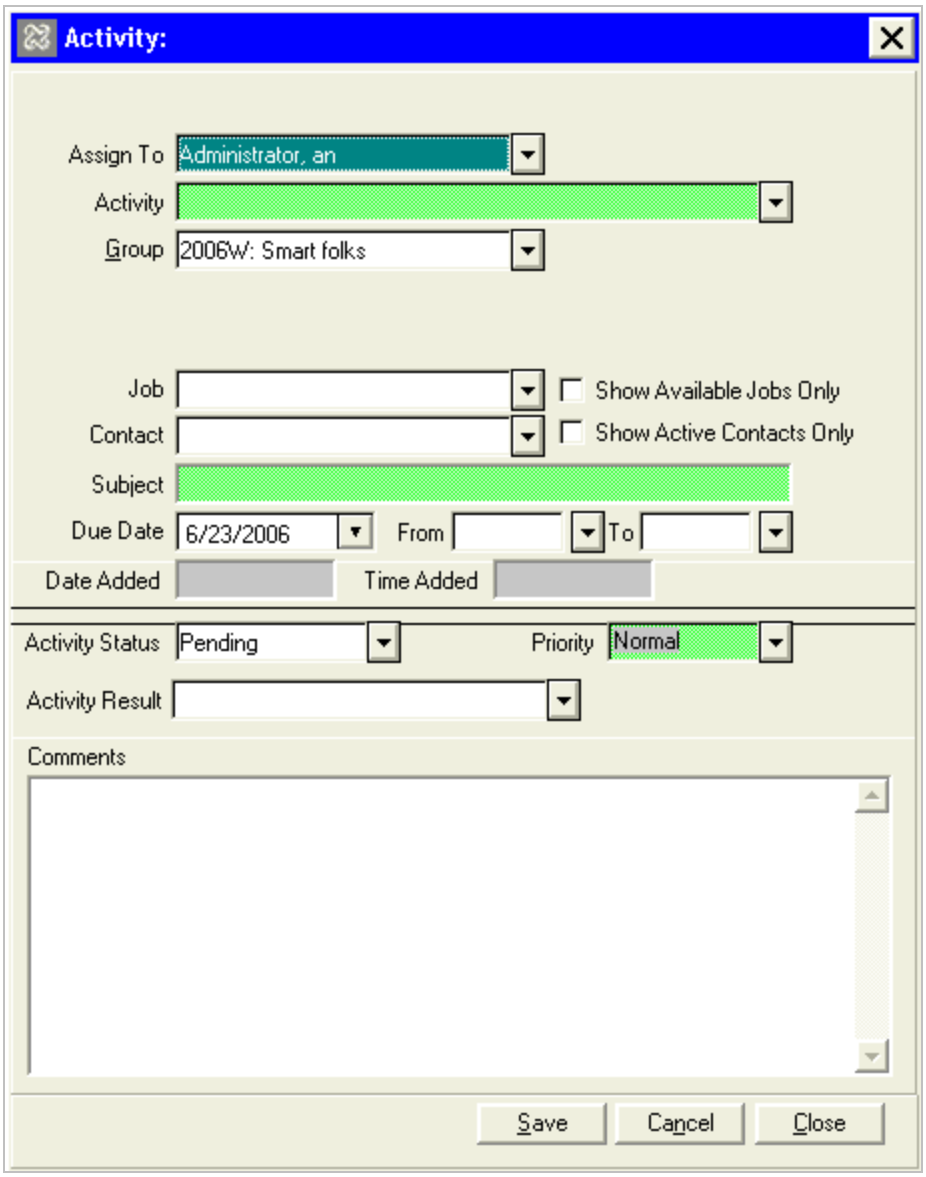
3. Select a student on the list.
4. Click **Delete**. A confirmation message is displayed asking if it is OK to remove the student from the group.
5. Click **Yes** to remove the student from the group, or click **No** to cancel the deletion of the selected student from the group.
6. Click **Close** to close the form that lists the student members of the group.
7. Click **Close** again to close the Student Groups Form.

Add a Group Activity

By selecting a group from the list of groups and then selecting Schedule Activity, you can assign the same activity to all students in the group. The activity you want to assign must already be available as an option on the possible activities list.

To add an activity to a group:

1. Navigate to **View > Student Groups**. The Student Groups form is displayed.
2. Click the name of a group to select it.
3. Click **Schedule Activity**. The Group Activity form is displayed. See also Activity form.



4. Check that the correct **Group name** is shown on the form. If it is not, select the correct one from the list.
5. Select an **Activity**. The description of the activity also appears in the Subject text box, but you can change the

subject if necessary.

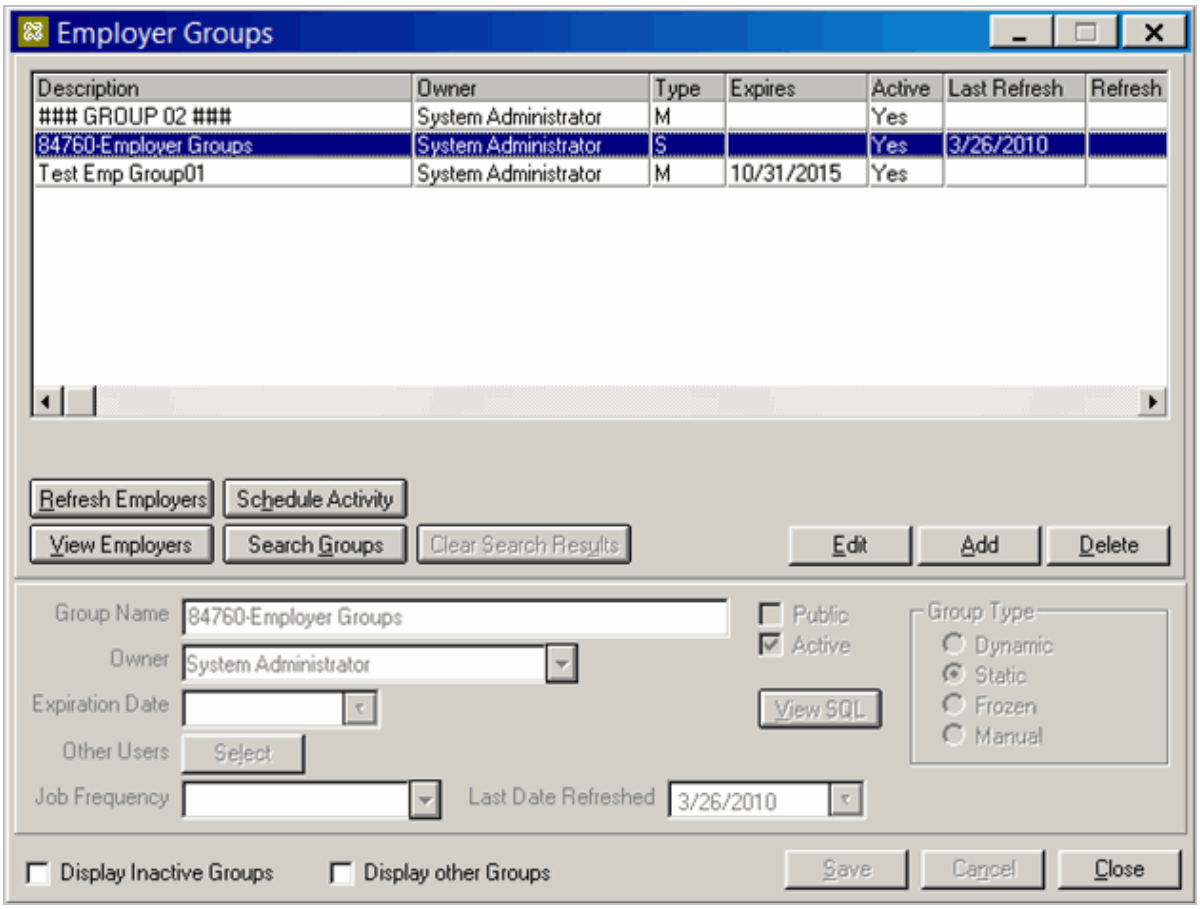
6. Select the **Due Date**.
7. If necessary, select the **From and To** times.
8. Select the appropriate **Status** of the activity.
9. Select the appropriate **Priority** of the activity.
10. Enter any necessary **comments** in the large text box.
11. Click **Save** to save the activity and apply it to all members of the group. The Group Activity form is closed.

Employer Groups

Groups serve to organize a list of employers who have one or more characteristics in common. They may all be related to a particular field of study, offer only part-time or intern/extern jobs, or just about anything else you can think of.

When you select an employer from the Employer Group list, the View Employers, Schedule Activity, and Search Groups buttons become available to use.

Select the **Display Inactive Groups** check box if you only want to see a list of Inactive Groups or select the **Display other Groups** to only see a list of other Groups.



An employer group can be created in the following ways:

- Through lists of employers on a report
- Through a search of employers
- By manually adding a new group and selecting employers to be members of it

The process of creating an employer group via a report is described in "Employer Report Preview". See also Employer Search for creating an Employer Group via the Employer Search process.

Creating a Employer Group from a Report

Only authorized users may create an Employer Group from a Report. Authorization may be established by setting the Allow Dynamic Groups option to "Yes" for the staff member. See System settings for additional information.

The process of manually creating an Employer Group is described later in this topic.

Only authorized users may view/edit/add/delete/ or print Employer Groups. See System settings to set up these permissions.

You can view the list of employers who are members of a group, add employers to a group, and remove employers from a group. You can schedule activities for the members of the group as a whole. (To schedule an activity for an individual member of the group, you must do so through the Daily > Career Services > Employers > Activities button path.)

A group is "owned" by the user who creates it. Ownership can be transferred from one owner to another. Once ownership of a private group is transferred, the previous owner no longer has the right to see the group.

A group can be Public or Private. A public group can be viewed and edited by persons other than the one who created the group. A Private group can be viewed and edited only by the person who created it, or those authorized to do so by the group's creator. A group that is formed by saving a search or running a report is typically designated as Private (not Public) until the owner intentionally sets it to be Public. A manually created group defaults to Public. The person creating the group must clear the Public option if necessary to keep it private.

A group can be active or inactive as required by the owner.

Adding and Deleting Group Members

If the group is a manual group type and it is "Public", any user with appropriate access rights can add and delete employers. Only the owner of a Private group or the system administrator can perform maintenance, such as adding and removing employers.

The owner of a Private group or the system administrator can add or delete staff members who have access to that group. When the Public check box is disabled, the Other User **Select** button becomes available. Clicking **Select** displays the **Student Group Staff** form.

Note: Additional users can only add/remove employers from the group from the employer's **View** menu, not from their **Manage Student Groups** form.

The authorized user can search for staff members and add them to the list of Selected Staff for the group. The **Search** button becomes available when the user enters data in any of the search criteria fields or selects a Staff Group from the drop-down list.

Check the **Display Inactive Groups** box at the bottom of the form to view inactive groups. The default view lists only employer groups that are active.

Check the **Display other Groups** box at the bottom of the form to view public groups not owned by the logged in user. The default view lists all employer groups that the logged in user owns or has been given permission to edit.

Group Types

Group types can be **dynamic**, **static**, **frozen**, or **manual**. Dynamic, static, and frozen groups are typically formed by saving the results of a search or a report. These group types can be changed from one type to another, including manual. The manual type, however, cannot be changed to any of the other types since there are no automatic parameters involved.

Dynamic Group

The list of employers in a dynamic group changes when an employer qualifies for the group by virtue of a change in the variable upon which the group was selected. For example, if a group is made up of employers in the General Management Program Version 2, any employer who is enrolled in that version of the program is automatically a member of the group. A employer who leaves the program is automatically removed from the group. A dynamic group can be changed to a manual group, but once you save it as a manual type, it cannot be changed back to dynamic.

An "Allow Dynamic Groups" option is available in the System setup parameters. If you select No for this option, the program will make the dynamic employer group type unavailable when creating new groups.

On the Student Groups maintenance form, if the Allow Dynamic Groups option is **No**, the program does not allow the group type to be changed to dynamic. It will display a message, "*Dynamic Groups have been disabled by the System Administrator*". If you select **Yes**, the program will function as described above.

Static Group

A static group is one that once created can be "refreshed" from time to time by clicking **Refresh**. A static group can be changed to a Manual group, but once you save it as a Manual type, it cannot be changed back to Static.

Frozen Group

A frozen group is one that once created cannot be updated. This type of group can be used when you want to compile a list of employers that will never change. The employers meet a certain criteria on a given date and the members of the group must be retained indefinitely. For instance, you might want a list of employers who started on a given date. No one else can qualify for the group except the employers who actually started on the given date and you want to track them for some time into the future.

Note the distinction between "frozen" and "not active". A frozen group is still available for use in the purpose for which it was created. A group that is "not active" is no longer available for use.

Manual Group

A manual group is created and maintained by the user. The user can include or remove employers from the list at will. You as the user might create an initial list for the group by running a report and then add or remove employers from the group as required.

Group Type Change Warning

If you attempt to add or delete an employer in a dynamic, static, or frozen group, a verification message is displayed indicating that removing the employer from this group will convert the group type to manual. Click Yes to continue, No to stop the process.

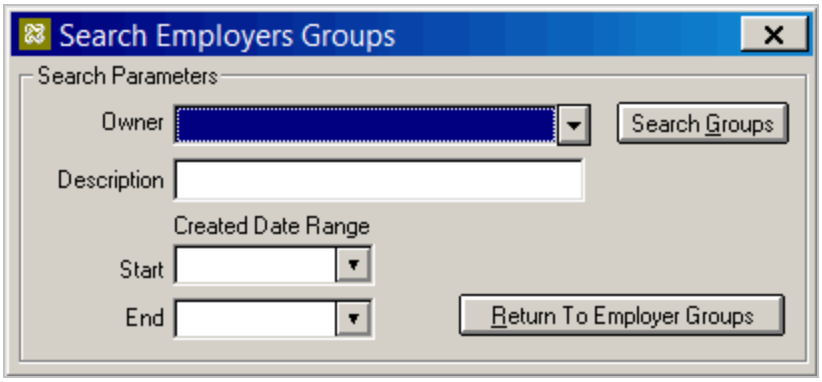
If you answer **Yes** to this message, the group is converted to a Manual group type. It no longer behaves as an automatically controlled group type.

View Employers

Click View Employers to add an existing Employer to a Group. The Employer Group form will appear.

Search Groups

Search for Employer Groups by clicking on Search Groups. The Search Employer Groups form is displayed. Enter your search criteria and click on **Search Groups**. You are returned to the Employer Groups form and a list of Employer Groups meeting the search criteria that you entered is displayed.

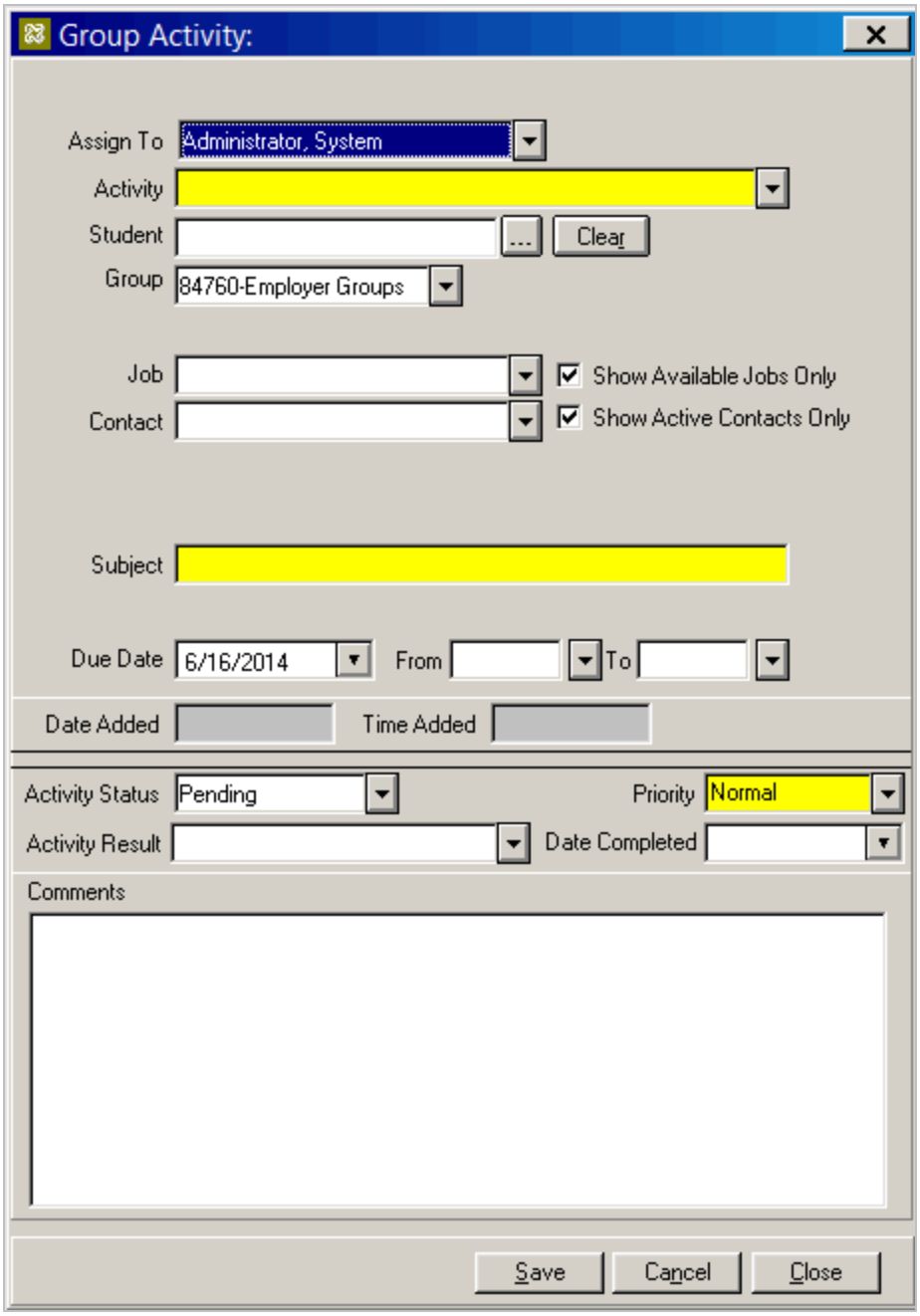


Clear Search Results

Click **Clear Search Results** to clear the search results and begin a new search. Upon clicking this button, the Search Groups button will become available.

Schedule Activity

Click the Schedule Activity button to schedule an activity for the Employer Group. The Group Activity form will appear. Select an activity from the **Activity** drop-down list and enter a subject in the **Subject** line. Click the **Save** button to save the scheduled activity.



Adding a Manual Group

To add a manual group:

1. Navigate to **View > Employer Groups**. The Student Groups form is displayed.
2. Select **Add**.
3. Type a name for the group in the **Group Name** text box.
4. Your name will appear on the **Owner** text box as a default. You can select another name from the drop-down list if necessary.
5. To make the list available to other users, be sure that **Public** has a check mark in the box. The default is to make the group public.
6. To make the list active, be sure that **Active** has a check mark in the box. The default is to make the group active.
7. Click **Save** to save the new group. It will be added to the list.

Note: The group is automatically designated as a "**Manual**" group.

Deleting a Group

Only the owner of the group can delete it from the list of groups.

Deleting an employer group does not remove the employers in the group from the CampusNexus Student database. Deleting an employer group simply dissolves the symbolic relationship of the employers in the group.

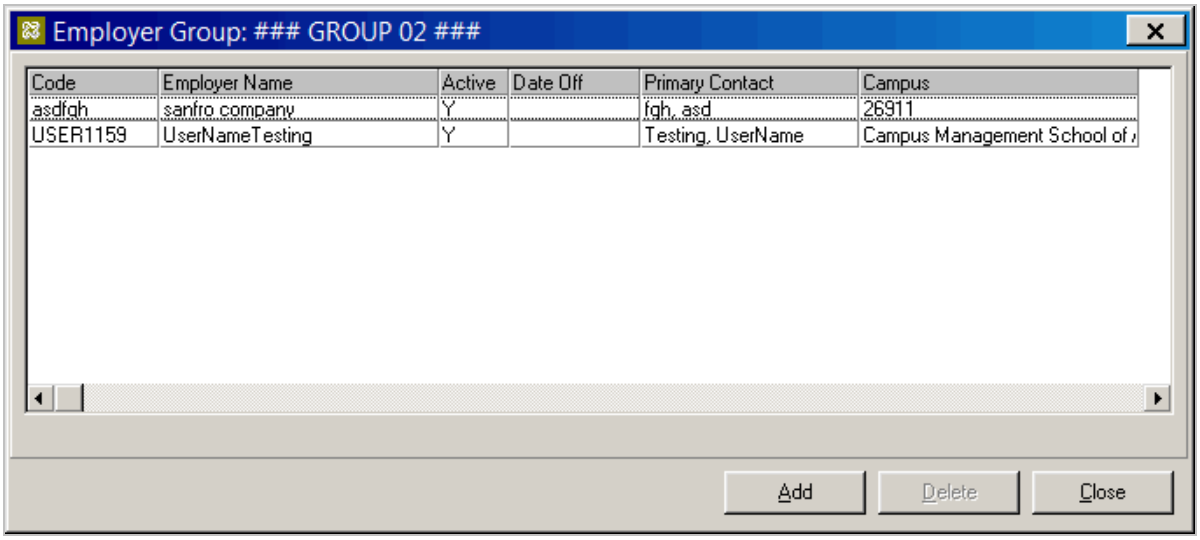
To delete a group:

1. Navigate to **View > Employer Groups**. The Student Groups form is displayed.
2. Select (highlight) the group to be deleted.
3. Click **Delete**. Confirm your intention to delete the group.
4. Click **Yes** to confirm the deletion.

View Employers

To view a list of the members in an employer group:

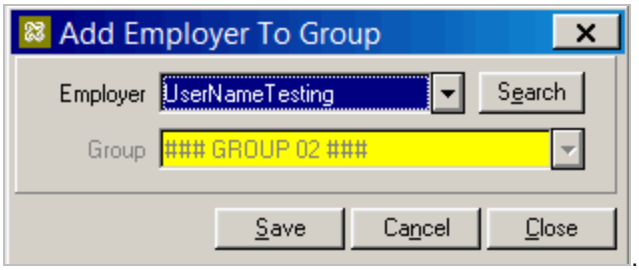
1. Navigate to **View** > Employer Groups (or click the Employer Groups icon or the View Groups for this Employer icon on the Toolbar). The Employer Groups form is displayed.
2. Select an Employer Group and click **View Employers**. The Employer Group form is displayed listing members of the group.



3. Double-click an employer in the grid to view the contact information on the Employers form.

Adding an Employer to an Employer Group

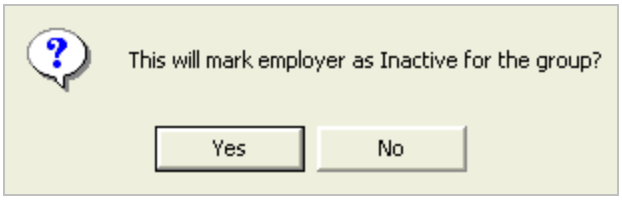
4. If you are authorized to add an employer to an employer group, click **Add**.
5. On the Add Employer to Group form, select a Employer from the drop-down list.



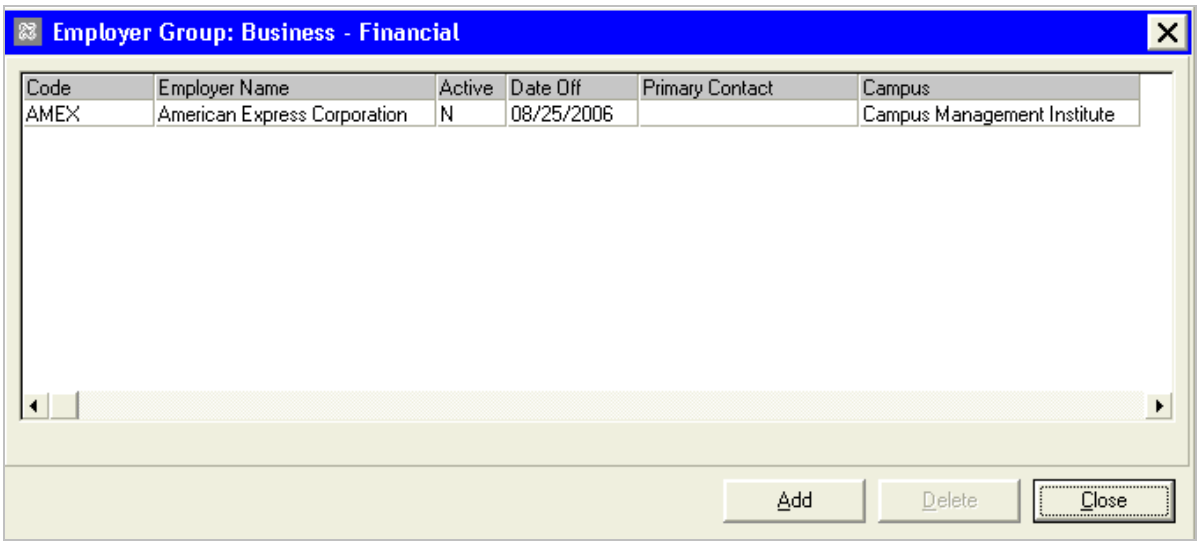
6. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Deleting an Employer from an Employer Group

4. An authorized user can remove an employer from an employer group by clicking **Delete**.
5. A following warning message will appear. Select **Yes** to continue, otherwise select **No**.



6. An 'N' will be placed in the Active column of the employer and the 'Date Off' column indicates the date when the employer was removed from the group.



7. Click **Close** to close the form.

Note: If you attempt to add or delete an employer in a dynamic, static, or frozen list, a warning message is displayed about changing the group to a manual group.

Employer Report Preview

When you have selected the appropriate parameters from the Report Selection form, click **Preview** to see a preview of your report.

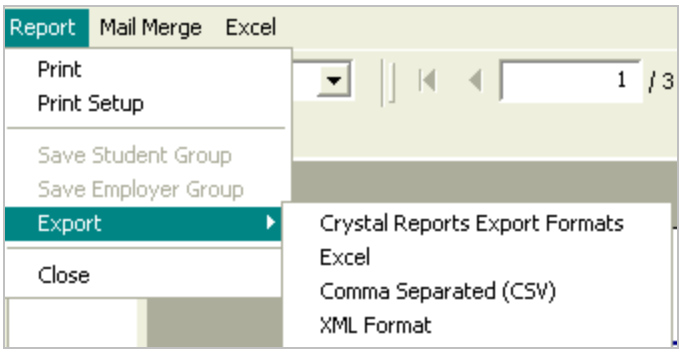
Our example is the Employer Master Listing report from the Career Services reports list.

Report Viewer Controls

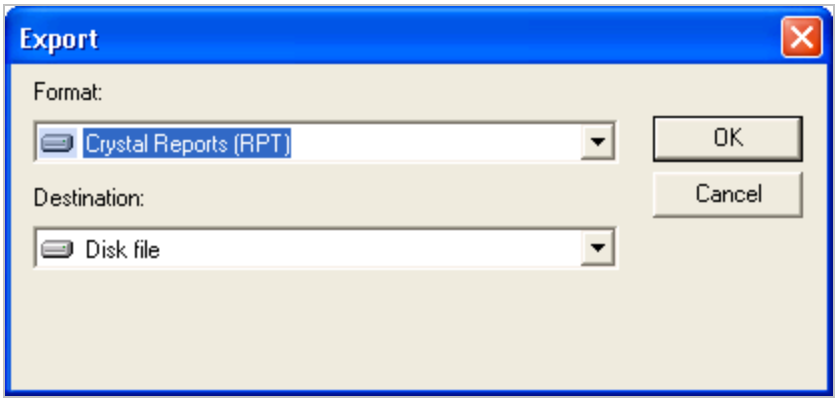
Report Menu. The Report menu on the Report Viewer form provides for printing the report, printer setup, exporting the report to other applications such as Excel, and closing the viewer window.

- **Print**. Select the print option when you are ready to print the report. A print tool is also provided at the top of the form.
- **Print Setup**. The Print Setup option calls the typical Windows printer setup form from which you can select a printer, set the number of copies to be printed and other reporting functions.
- **Save Employer Group**. If the internal Campus ID and internal Employer Id are contained in the record set for the report, you can save the employers listed on the report as a group. Select this option and give your group a name.

  The new employer group is initially saved as a "Static" group, meaning that there will be no change in the members of the group. You can, however, open the group via **View > Employer Groups** and change the group type to Dynamic, Frozen, or Manual. See the Employer Groups topic for more on this procedure.
- **Export**. If you select the Export option, the report selection dialog opens.



- With each report selection you can then select the format and destination of your report. Several options are available for both **Format** and **Destination**. Click **OK** after you make your selections.



- **Close**. Select Close to close the report preview. You can do this before or after you print the report. The program will return to the Report Selection form.

Mail Merge

When you click the Mail Merge option, all letter activities are listed as options. You can select one with which to merge the data on the displayed report.

When you select to use the Mail Merge feature, you can run the selected report, use the Merge tool to combine and print letters, and update the employer's activity record after processing the letter, if you so choose. The system will prompt you with a dialog box asking if you would like to update the Contact Manager. If you select 'Yes', then the employer's Contact Manager history will be updated after the Mail Merge from the reports.

Excel

This option exports the data on the report to an Excel spreadsheet. This feature appears on every report. The export procedure uses column names for headings. A maximum of 65,000 rows can be exported. Sub-reports are not exported.

Navigation Tools

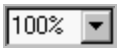
At the top of the Report Viewer form, there is a set of navigation tools to help you maneuver in a multi-page report. By clicking the appropriate tool, you can go to the first page of the report, the next page, the previous page, and the last page.

Report Views The report viewer provides a method of narrowing your view of the previewed report. By double-clicking on a report heading or sub-heading, you can open a view containing only that heading and the data below it. When you open a view of a heading, the program creates a view tab at the top of the report. You can alternate between views until you get the information you require. You can also print only a selected view of the report.

Close Current View. Click on the view to be closed and then click to close it.

Group Tree. On the left side of the Report Viewer is a control known as the Group Tree. It is used to drill down to specific portions of your report. It is more significant in long reports and in those that have more than one or two groups. Click on the plus and minus boxes beside the group names to expand or contract the tree list. Click on a tree item to go to that portion of the report.

Toggle Group Tree. Use this tool to show or hide the Group Tree. To see more of the report page in your viewer window, hide the Group Tree by clicking this tool. Click it again to bring back the Group Tree.

Report Size. Use this tool  to size the image of the report to a convenient viewing size. Select one of the options from the drop-down list or specify your own percentage value.

Text Search. Find the text you need in the report preview by typing it in the Text Search box and clicking the binoculars. The program will find the first occurrence of the text in the report. If you click the binoculars again, it will find the next occurrence, and so on. Your search text entries are saved in a list so that you can go back to them by clicking the arrow beside the text box. When you close the report, your search entries are discarded.

Changing System Administrator Session Parameters

Properly setting Session Parameters for the institution's campus, term, FA year, and module can reduce the amount of time it takes for a user to navigate to the features they use most and assist users who need to see forms that may change every year.

An authorized user can view and change the System Administrator Session Parameters:

1. Navigate to **View > Session Defaults** or double-click on the campus code on the bottom task bar. The System Administrator Session Parameters form is displayed, showing only options that the user has permissions to change.
2. Select the Campus, Term, FA Year that CampusNexus Student defaults to when opened. The Term, FA Year and Module (default module that opens after sign on) can be set to None or no default. The Campus must be chosen. **Note:** If a Module is selected, the Document Tracking form for a student displays a grid showing only documents associated with this module.
3. Select **Show this screen every time CampusNexus Student starts** to see this form at the start of every session.
4. If a user signed in using a CampusNexus Student database password, the Change Password button can be clicked. This is the only way that the "Administrator" account user can change the sign on password. Click **Change Password**, and the User Password Change form is displayed. Type the Old Password int he appropriate field and then type a new password in the other two fields. Click **Save**, or click **Cancel** to cancel changes.
5. Click **Save**.

Important: There is no way to cancel any changes that have been made to this form. To revert to options that existed before the form was changed, change the options back and then click Save or close the form.

Menu Bar

The CampusNexus Student Menu Bar is essentially the gateway to the program. What you see on your Menu Bar may vary from the illustration here depending on your work assignments. Access to all menu commands in CampusNexus Student is controlled by the security features built into the system. See your supervisor or system administrator if you need access to additional CampusNexus Student menu commands.

Some commands on the drop-down menus may be "dimmed". This indicates that the command is unavailable (not active) at the time you are viewing it. A "dimmed" option may become available at some other time depending on conditions that change from moment to moment during program operations.

- To open the menus from the Menu Bar, point to the menu name with your mouse and click the left mouse button. You can also use your computer keyboard to access the menus by holding down the Alt key and pressing the underlined letter in each menu name (for example the F in File). This is referred to as the "access key". Note that when two menu names on the menu bar -- or two commands on a menu -- begin with the same letter (e.g., File and Find), the first letter of the word is not always used as the access key. The access key for Find is the Alt I combination. (Uppercase and lowercase are not important in this context.)
- When you select a menu command, a submenu is displayed in some cases. Note that many commands on the various submenus also have access keys associated with them. When you learn to use these key combinations, you can minimize your use of the mouse and speed up your work.

Menus on the CampusNexus Student Menu Bar

File: This menu includes commands for adding a new lead, creating new records for various forms, editing displayed records, saving edited data, canceling an edit operation, closing the active window, refreshing the active form, deleting a record, printing a picture of your screen, setting up printer options, and exiting from the CampusNexus Student program.

Find: Select this menu to find an individual student or group of students.

View: This menu enables you to view and edit the information related to individual students in the CampusNexus Student system. Commands are grouped into departmental submenus. Generally, the commands that are available on the View menu correspond to the groups of folders accessible from the Student Bar.

Note: On the Student Bar, It is possible to "drag" a folder from one group to another. It is also possible to rearrange the folders by "dragging" them within a given group. These user actions will create differences between the commands on the View menu and the group folders on the Student Bar. Because these are user choices, Help topics will always refer to the commands on the View menu and submenus, which cannot be changed by a user, rather than to the folders and groups arranged on the Student Bar.

The View menu also includes a command you can use to see and edit your session defaults: the Campus, Term, and FA year with which you are working. The defaults will remain set until you change them here, even if you sign out and sign in again.

On the View menu, you can elect to see or hide the Student Bar, Recent Student Bar, and Status Bar.

Lists: The Lists menu is used to set up the many options used by your institution to control your daily operations. The lists are organized by department. When you select a department, a form is opened containing the lists for that department. Each list is represented by a tab on the form. Each departmental list is further described in a Help topic. General list maintenance procedures can be found in Lists Menu > List Maintenance.

Daily: The Daily menu refers to functions that are performed frequently during everyday operation of your college, school, or campus. Again, the menu is organized by department. Each department has a submenu of commands associated with its own daily procedures.

Reports: The Reports menu is also organized by departments. Each department has a list of reports that are relevant to the work it does.

Other commands on the Reports menu include:

- **Custom Reports**: This command invokes a listing of customized reports designed specifically for your campus.
- **Open Report Selector**: This command opens a form on which all reports, including custom reports, are listed by module.

Window: This menu lists the windows that are currently open in the CampusNexus Student. Since CampusNexus Student can have many windows (forms) open at the same time, the menu listing is constantly changing as you open and close windows. On the list of open windows, the active window is indicated by a check mark to the left of the window name.

This menu also includes commands for arranging windows in the work area in tiled format or in cascaded format.

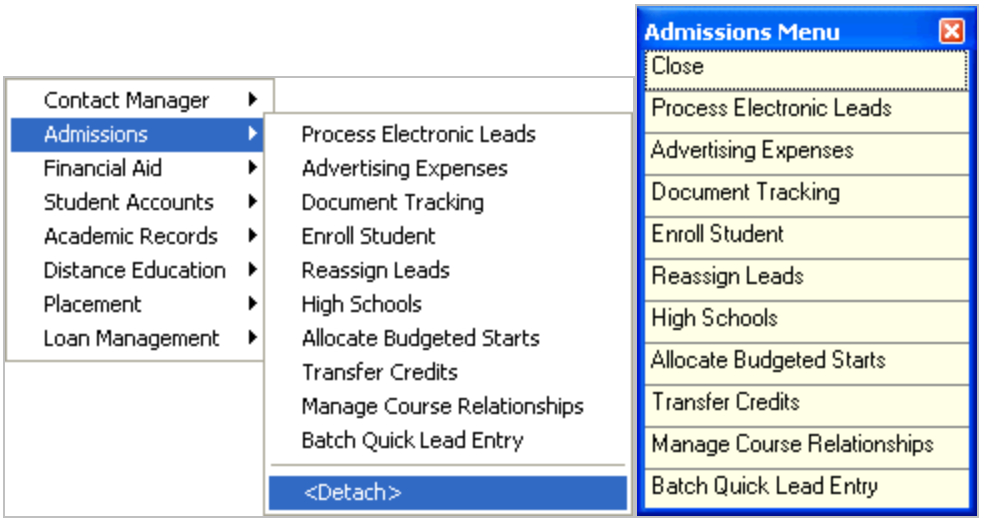
Setup: The Setup menu is available to users with CampusNexus Student system administrator (SA) privileges for the control of system parameters such as Campus and Staff Member identification, system-level settings for the various modules, security issues, access to the data dictionary, and other functions that may be added to the system.

Through appropriate management of security settings, specific menus and commands can be made available to users not having overall SA authority. For instance, the Financial Aid Administrator may be given access to Setup > Financial Aid.

Help: The Help menu lists the various options available to you for getting help with CampusNexus Student.

Detaching Submenus from the Daily Menu

Most modules accessible from the Daily menu include a **<Detach>** command on their submenus. This feature enables you to "detach" the submenu so that it remains on the screen at all times. This prevents you from having to select **Daily > Module > Command** each time you want to repeat an option.



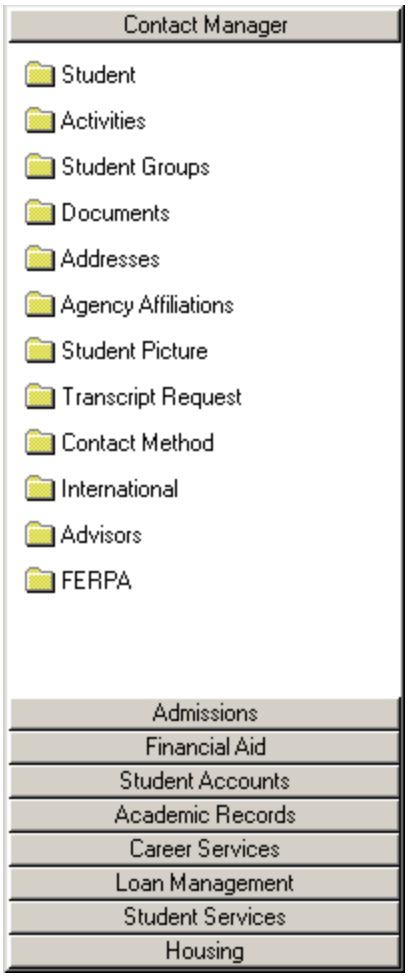
To detach a submenu for a module listed on the Daily menu, click the **<Detach>** command.

The list of commands will remain on the screen until you select **Close** at the top of the detached submenu or click **X** in the upper right corner of the submenu.

CampusVue Finance, HR & Payroll Launch

This feature allows a user who logged into CampusNexus Student to start CampusVue Finance, HR & Payroll without having to log in a second time. CampusVue Finance, HR & Payroll must be installed, and the end user must be given permission to access CampusVue Finance, HR & Payroll through the Centralized Security Application. If the user has the appropriate security rights, clicking the CampusVue Finance, HR & Payroll icon located at the far right of the Menu Bar will open the application.

Student Bar



The Student Bar organizes the functions in CampusNexus Student that are related to an individual student. To enable these functions, you must first select a student with which to work.

You can show or hide the Student Bar by navigating to **View > Student Bar**.

The student currently displayed in the Recent Students list box on the Toolbar is assumed to be the one you want to use.

Note that the group folders displayed on the Student Bar correspond to the options available on the View menu. If a user has no access to any commands on the View menu, the Student Bar will be cleared and the caption removed.

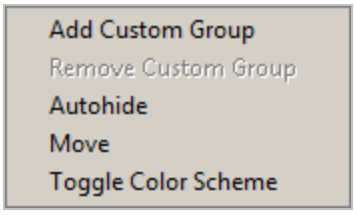
The Student Bar is organized by department. Each department contains one or more folders. Clicking a folder opens it in the work area with the student's relevant data displayed on a corresponding form.

Note: You can drag a folder from one group header to another on the Student Bar, and you can rearrange the folders by dragging them within a group header. These actions will create differences between the options on the View menu and the folders on the Student Bar. Because these are user choices, Help topics always refer to the View menu options, which cannot be changed by a user, rather than to the folders displayed on the Student Bar.

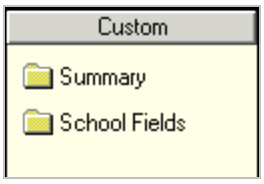
Adding a Custom Group to the Student Bar

To create a Custom group at the top of the Student Bar:

1. **Right-click** on the Student Bar. A shortcut menu appears.



2. Select **Add Custom Group**. A group header called **Custom** is added at the top of the Student Bar and the following message is displayed: *"Custom group has been added. Drag folders from other groups to your new custom group."*
3. Drag folders into the Custom group from other groups as needed.



4. To remove the Custom group from the Student Bar, right-click the Student Bar and select **Remove Custom Group**. Any folders remaining under the Custom group will be returned to the group from which they were dragged.

Autohide Student Bar

You can "autohide" the Student Bar, i.e., cause it to disappear and reappear under specific conditions.

To turn on the Autohide feature, **right-click the Student Bar** and select **Autohide** from the menu.

In Autohide mode, the Student Bar will disappear when you select an item from the Student Bar or when you move the mouse pointer more than ½ inch away from the border of the Student Bar. The Student Bar reappears when you move the mouse pointer to within ½ inch of the border of the Student Bar.

Note: Autohide does not work when a form is maximized in the work area.

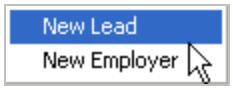
More information on the items associated with the Student Bar can be found in topics related to the View menu.

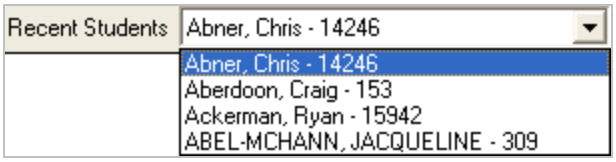
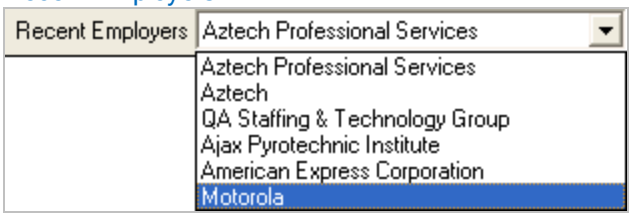
Toolbar

You can display or hide the toolbar in your CampusNexus Student main window.

- If the toolbar is displayed, select **View** > **Toolbars**. The toolbar is hidden.
- If the toolbar is not displayed, select **View** > **Toolbars**. The toolbar is displayed.

Tool Descriptions

Tool	Description
Quick Lead Entry (short form)	This tool is the same as the Add New Lead command on the File menu. **Ctrl+L** also starts a new lead form.
New Lead (Student Master form) or New Employer	The New Lead tool opens the same form as the New Lead (full) command on the File menu. Click to see commands for entering a new student or employer. **Ctrl+N** also starts the Student Master form. The New Employer command opens the Employer Master form. 
Print	This tool sends an image of the CampusNexus Student window to the user's default printer. This is the same as the Print command on the File menu. **Ctrl+P** also prints the window.
Find an individual student, student group, or employer.	This tool opens a Search form from which you can find one or more student or employer records. Click to see commands for finding a student or employer.
Manage Student Groups	This tool opens the Student Groups form. Using this form, you can create student groups and work with groups that have been created from other procedures.
Contact Manager	This tool opens the Contact Manager form, which is also accessed by navigating to Daily > Contact Manager > Contact Manager.
Manage Employer Groups	This tool opens the Employer Groups form. Using this form, you can create employer groups and work with groups that have been created from other procedures.
Close All Forms	This tool closes all forms in the CampusNexus Student work area.

Tool	Description
Exit	This tool starts the procedure to close CampusNexus Student.
Students/Employers Switch	This tool switches the most recent window list from most recently accessed students to most recently accessed employers, or back.
Recent Students 	The Recent Students list box contains a list of students with whom you have recently worked. The number of students that appear on the list depends on a system value chosen by the system administrator. CampusNexus Student can be configured to show the student's school ID or the student's Social Security Number (SSN) beside the name in the text box. Another location for the most recent students list is on the **File** menu where the nine most recent students with whom you worked are listed. Students are added to the list of recent students when you create a new student record or when you search for a student that has already been entered in the system. (Go to the Find menu or click to search for student records.)
Recent Employers 	The Recent Employers list box contains a list of employers with whom you have recently worked. The number of employers that appear on the list depends on a system value chosen by the system administrator.
Hold Signal	If the currently selected student is on hold, this signal is red. If the student is not on hold, the signal is green. When you open the Student Master record of a student on hold, the signal turns red. A sound can also be played (.wav file). If you hover the mouse pointer over the red signal, a tooltip is displayed to indicate the type of hold involved. More than one type of hold may be indicated.
View Contact History	Select this tool to see a list of Contact Manager activities for the currently selected student.
View Student Groups	Select this tool to see a list of student groups to which the currently selected student belongs.
View Documents	Select this tool to see a list of documents requested from the currently selected student.

Tool	Description
View Addresses	Select this tool to see a list of alternative addresses related to the currently selected student.
Search Reference Addresses	Select this tool to open a search form in which you can search for students by the contents of their alternative addresses.
View Employer Groups	Select this tool access the Groups for Employer form.

Status Bar

At the bottom of the main window is the Status Bar. Helpful hints, messages, and other basic information is displayed at various times on the Status Bar.

Right Side of the Status Bar

The right side of the Status Bar displays some basic information about the program and what's happening. From the left, this information includes:

- **Add/Display/Edit Mode Indicator**: indicates ADD, DISPLAY, or EDIT mode.

  You can change data on a form when you are in ADD or EDIT mode. ADD mode occurs when you add a new record to the database.

- **User ID**: indicates the identification code of the user who is currently logged into CampusNexus Student on this computer.
- **Campus ID**: indicates the identification code of the currently selected campus.
- **Active Form**: indicates the name of the currently active form.
- **System Date**: shows the current system date.

Left Side of the Status Bar

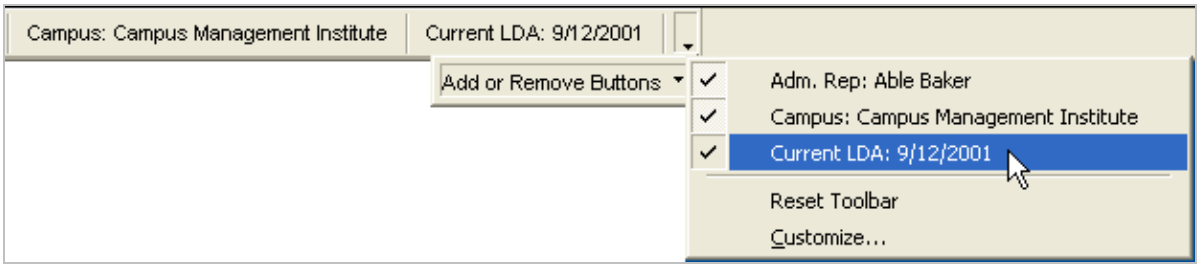
The left side of the Status Bar is reserved for messages and instructions that you will find helpful when working in CampusNexus Student. Data entry tips, messages regarding system operations, and other variable information may be displayed here at any given time. Look here first when you want to know what's happening behind the scenes.

Show or Hide the Status Bar

You can show or hide the Status Bar that is just below your work area.

- When the Status Bar is displayed, select **View > Status Bar**. The Status Bar is hidden.
- When the Status Bar is not displayed, select **View > Status Bar**. The Status Bar is revealed.

User Toolbar



The User Toolbar is customizable based on the forms you have access to and is refreshed with a change in students. These forms are represented by icons that you can specify. You can define "hanging data elements" that will always be displayed on the User Toolbar. The hanging data elements might be the SSN, Start Date, Program, and so on. The available data elements are fields associated with the Student Master record. The customize procedures are described in Customize User Toolbar.

The **User Toolbar** command on the **View** menu provides a means to toggle the User Toolbar on and off in the CampusNexus Student main window:

- If the User Toolbar is displayed, select **View** from the Main Menu, then click **User Toolbar**. The User Toolbar will be removed.
- If the User Toolbar is **not** displayed, select **View** from the Main Menu, then click **User Toolbar**. The User Toolbar will be added.

Once data items and forms are added to your User Toolbar, you can temporarily add or remove items by clicking the down-arrow button (Tooltip: More Buttons) located next to the form icons or data items. The **Add or Remove Buttons** option is displayed. Click it and slide the mouse pointer to the right to see the forms icon buttons (or data items) and other available commands.

Click a forms icon or data item to remove it from the toolbar or, if the item is not selected, click it to add it to the User Toolbar. The **Reset Toolbar** and **Customize...** options are temporary run-time functions. Any changes you make from these options are not saved when you close your current CampusNexus Student session.

Right-click the User Toolbar to display a shortcut menu on which you can open or close the Forms toolbar or the Data toolbar. The "Customize..." option on this menu makes available some temporary settings for the current session only.

User Toolbar Customization

You can configure the User Toolbar to provide customized data elements. The toolbar is customizable based on the forms you can access; the forms refresh with a change in students. You can define "hanging data elements" that will permanently be displayed on the toolbar. Hanging data elements include, for example, Social Security Number (SSN), Start Date, and Program. The available data elements are fields associated with the Student Master record. Staff members must be given permission to configure the User Toolbar. Available forms are selected, icons assigned to the forms, and description or code display options selected for the data elements, so that the staff member can view the information applied to the User Toolbar.

Display Options

In the **Display** field of the **Customize User Toolbar** form, you can select whether you prefer to view a **Description** of the icons or the **Code** associated with these icons. Click **Apply** to apply your selections to the toolbar. Or double-click any element in the **Available** grid to open the **Select Icon** form.

Data Elements

In the bottom half of the **Customize User Toolbar** form, select the **Data Element** by clicking the name of the data element, and then clicking the right double-arrow button (>>) in the middle of the dialog box. The selected data element will be moved to the right-hand text box. Click **Apply** to apply your selections to the toolbar.

Note: Only information from the most current enrollment will be presented for these hanging data elements when the student has more than one enrollment in CampusNexus Student.

Assigning Permissions to Customize the User Toolbar

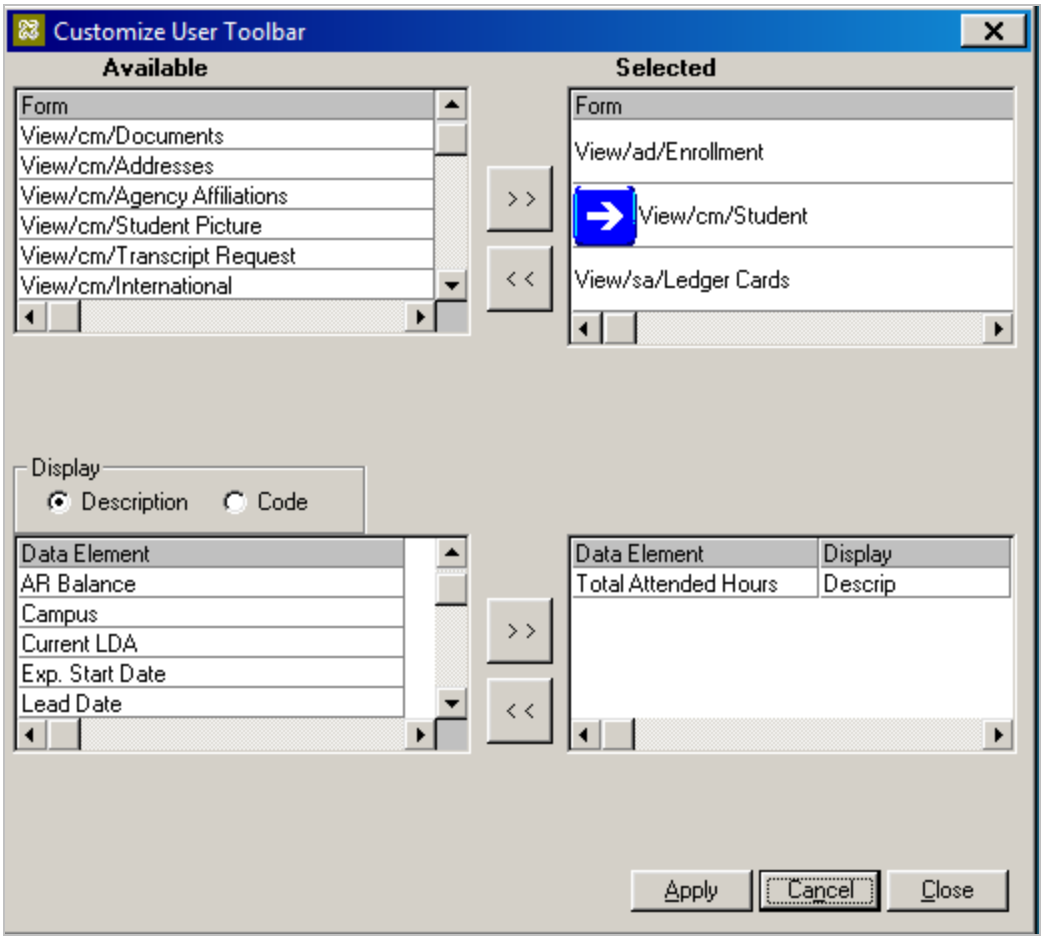
To allow a staff member to configure the customization of the toolbar:

1. Navigate to **Setup** > **Staff**. The Staff Maintenance form is displayed.
2. Click the **Staff Members** tab.
3. Select the name of the staff member who wants a customized toolbar and click **Edit**.
4. When the Staff Information form is displayed, select the **User Info** tab.
5. The General tab contains the Enable User Toolbar check box. Select this check box to activate the feature.
6. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. You are returned to the Staff Maintenance form.
7. Click **Close** to close the form.

Configuring Forms and Elements to View on the User Toolbar

To configure the forms and data elements you want to view on the User Toolbar:

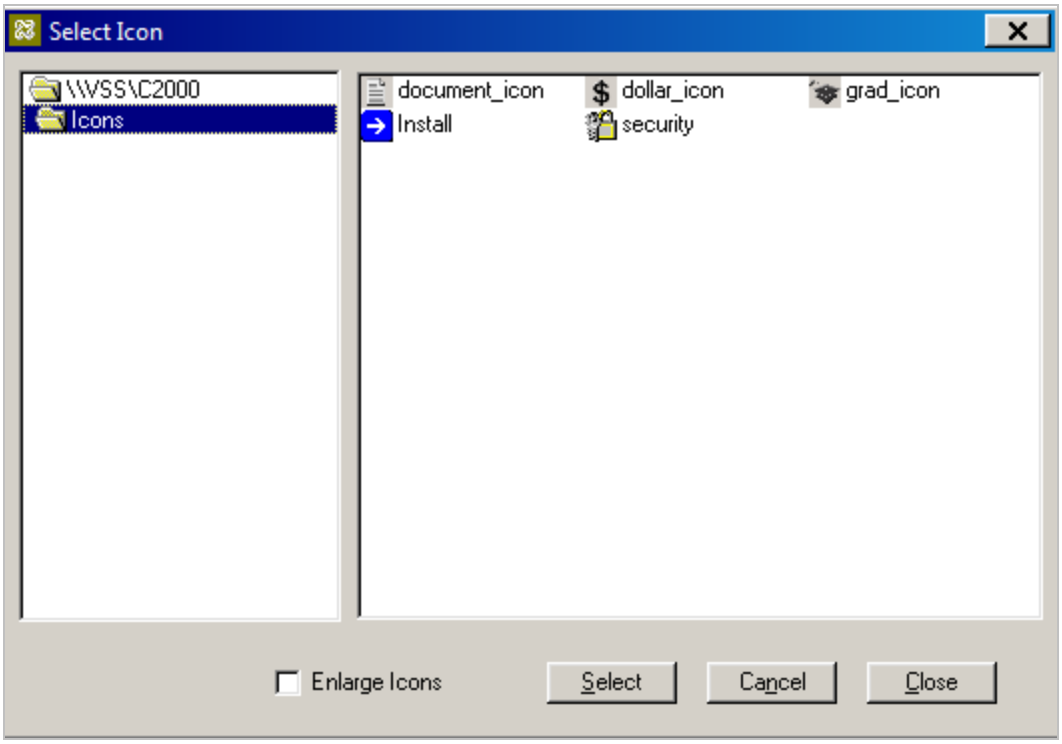
1. Navigate to **View** > **Customize User Toolbar**. A two-part form is displayed. The top half is a list of available forms you can select for quick access.



2. To select a form to display, click the name of the form in the **Available** list and then click

in the middle of the dialog box. The **Select Icon** form appears.

   Note: You can also double-click any element in the **Available** grid to open the **Select Icon** form.



3. Select an icon from the list that is displayed, or add one of your own for displaying on the customized toolbar. Then, the selected **Available** Data Element will be moved along with the selected icon to the **Selected** list on the right side of the **Customize User Toolbox** form.

   If you have trouble seeing the icons clearly, select the **Enlarge Icons** check box located on the bottom of the form. The icons appear in a magnified view.

   Note: A dedicated icon folder has been set up by your system administrator. To find the location of the icon folder, navigate to **Setup > System > General** tab. Scroll down the list of system settings to User Toolbar Icon Folder. If no path is displayed in the field, click the down arrow to find the folder labeled **Icons**. This form is in the CampusNexus Student Icons folder. The **Select Icon** form shows all icons in the icon folder.

4. Under **Display**, select whether you want to view a **Description** of the icons or the **Code** associated with these icons.

5. Under **Data Element**, click the name of the data element you want to display on the toolbar, and then click in the middle of the dialog box. The selected data element will be moved to the right-hand text box.

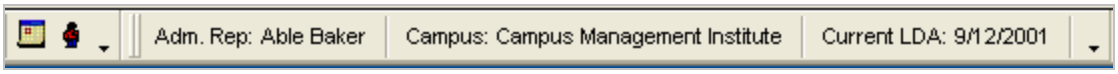
6. Click **Apply** to apply your selections to the toolbar.

   Note: Only information from the most current enrollment is presented for these hanging data elements when the student has more than one enrollment in CampusNexus Student.

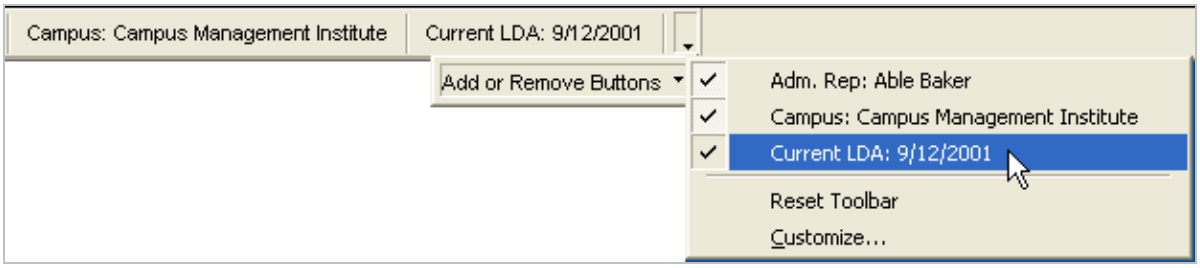
Viewing the Customized User Toolbar

To view the customized User Toolbar:

1. Once you have configured the hanging data elements that you would like to add to your **User Toolbar**, navigate to **View > User Toolbar**. If the **User Toolbar** was already displayed, then navigating to this path will cause the toolbar to be hidden; if the **User Toolbar** was not displayed, then navigating to this path will cause the **User Toolbar** to be displayed. The path acts as a show/hide toggle.

   Once data items and forms are configured for your **User Toolbar**, you can temporarily add or remove items by clicking the down-arrow button beside the form icons or the data items. The **Add** or **RemoveButtons** option is displayed. Click it and slide the mouse pointer to the right to see the forms icon buttons (or data items) and other options.

2. Click a forms icon or data item to remove it from the toolbar or, if the item is not selected, click it to add it to the **User Toolbar.** The **Reset Toolbar** and **Customize...** options are temporary run-time functions. In other words, any changes you make from these options are not saved when you close your current CampusNexus Student session.

3. Right-click the **User Toolbar** to display a shortcut menu on which you can open or close the **Forms toolbar** or the **Data toolbar**. The **Customize...** option on this menu leads to some temporary settings for the current session only.

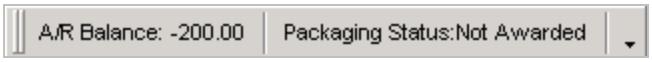
   Note: You can drag and drop the **User Toolbar** anywhere on your work area according to personal preference and ease of use.

Viewing the Packaging Status on the User Toolbar

To configure the Packaging Status to view on the User Toolbar:

1. Navigate to **View** > **Customize User Toolbar**. The Customize User Toolbar form is displayed.
2. In the Available section, click **View/cm/Agency Affiliations**.
3. In the Data Element Available pane at the bottom left, scroll down and select **Packaging Status**.
4. Click the right double-arrow button (**>>**) to move Packaging Status to the Selected pane on the right.
5. Click **Apply**.
6. Click **Close** to close the form.

The User Toolbar now displays the student's Packaging Status.



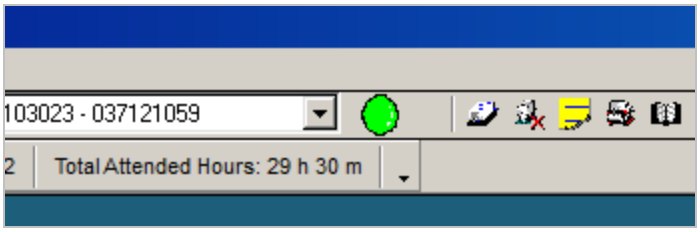
Note: Multiple packaging statuses may apply to a student based on the academic year, enrollment, and the student's position in an award year. The packaging status toolbar is used to enable users to assess the key attributes of a student's record. It should be noted that the packaging status displayed on the toolbar represents a specific status and may not be the status for the selected enrollment period or award year. Therefore, it is important to review the complete information (especially for continuing students with packaging for multiple periods.)

Enabling the Display of Total Attended Hours on the User Toolbar

To display Total Attended Hours for the most recent enrollment on the User Toolbar, perform the steps below. For additional information on customizing the User Toolbar, see the topic Configuring Forms and Elements to View on the User Toolbar.

1. Navigate to **View** > **Customize User Toolbar**. The Customize User Toolbar form is displayed.
2. In the Data Element Available pane at the bottom left, scroll down and select **Total Attended Hours**.
3. Click **>>** to move Total Attended Hours to the Selected pane on the right.
4. Click **Apply**.
5. Click **Close** to close the form.

The User Toolbar displays the student's Total Attended Hours in the format `## h ##m`.



Note: The Total Attended Hours data element will be empty if the Program Version is Non-Clock Hour.

Lists Menu

This menu is used to set up the lists that represent options used by your institution to control your daily operations. The lists are organized by department / module, e.g., Contact Manager, Admissions, Financial Aid, and so on.

Each list is represented by a tab on the form. To quickly access a tab, click the **Go To** button (or press **Alt+G**) displayed in the upper right-hand corner of the form. A drop-down list appears containing alphabetically sorted items corresponding to the form's tabs. Select the an item from this list to go directly to the corresponding tab. Click **Edit** to see the setup details for a selected list code or click **Add** to create a new code.

List codes are used throughout CampusNexus Student to help users make appropriate choices while completing forms. Drop-down lists on forms are designed so that list items that are set to 'Inactive' are not listed when adding or editing student information. Drop-down lists are refreshed immediately. By refreshing the drop-down lists, you can see all options available, including options added by other users while you are signed on. In some cases, the check box 'Include Inactive' is displayed. When this option is selected, all codes are listed; when cleared, only 'Active' codes are listed.

Refer to Maintaining Lists for more information about lists. Each list in CampusNexus Student is described in a topic you can select from the Table of Contents.

Maintaining Lists

Lists are the means through which the policies and procedures of your institution are translated into terms that CampusNexus Student can understand. When you enter data in the lists, you tailor CampusNexus Student to suit the needs of your operations. Lists serve to coordinate daily operations and make them consistent throughout your institution. Through the lists, terminology that is used in your environment is transmitted into the student records and administrative records.

Each module of CampusNexus Student has several lists associated with it. With appropriate access permissions you can view and edit some or all lists. Typically, the privilege of modifying most lists is reserved for management-level staff members.

The procedure for maintaining lists is consistent throughout CampusNexus Student.

To add a list item:

1. Select **Lists** from the main menu.
2. Select the department in which the list is used, for example, Admissions.
3. The Lists setup form (Setup - Admissions Lists) is displayed containing a number of tabs. Click the applicable tab, for example, Lead Source. The Lists setup form containing a list of the tab subject is displayed (Setup - Admissions Lists [Lead Sources]).
4. Click **Add** to add a list item. The tab subject Code Setup form is displayed (Lead Source Code Setup form).
5. Enter data in the appropriate fields. Fields with a colored background are required.
6. Select the **Active** check box if you want the code to be available for future use. A 'Y' in the Active column of the grid means that the item can be used; an 'N' means that it cannot be used in new records.
7. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

To edit a list item:

1. Select **Lists** from the main menu.
2. Select the department in which the list is used, for example, Admissions.
3. The Lists setup form (Setup - Admissions Lists) is displayed containing a number of tabs. Click the applicable tab, for example, Lead Source. The Lists setup form containing a list of the tab subject is displayed (Setup - Admissions Lists [Lead Sources]).
4. Select a list item and click the **Edit** button. The tab subject Code Setup form is displayed (Lead Source Code Setup form).
5. Modify the data in the fields.
6. Select the **Active** check box if you want the code to be available for future use. A 'Y' in the Active column of the table means that the item can be used; an 'N' means that it cannot be used in new records.
7. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

To delete a list item:

Note: CampusNexus Student does not allow you to delete an item from a list if the item is used in student or administrative records. As an alternative to deleting an item from a list, consider "disabling" it (changing it to inactive).

1. Select **Lists** from the main menu.
2. Select the department in which the list is used.

3. The Lists setup form is displayed. Click the applicable tab. The Lists setup form containing a list of the tab subject is displayed.
4. Select a list item and click **Delete** .
5. A confirmation message is displayed. Click **Yes**. The item is removed from the list.

To disable or enable a list item:

Note: Disabling an item in a list means that it can no longer be assigned to student or administrative record. The item remains on file for historical and reporting purposes. This is usually preferable to deleting an item since no record of a deleted list item is maintained in CampusNexus Student.

1. Select **Lists** from the main menu.
2. Select the department in which the list is used.
3. The Lists setup form is displayed. Click the applicable tab. The Lists setup form containing a list of the tab subject is displayed.
4. Select a list item and click **Disable** .
5. The Active column for the selected list item changes from 'Y' (yes) to 'N' (no). The Disable button changes to Enable. If you click **Enable**, the Active column changes to 'Y'.

To print a report of list items:

1. Select **Lists** from the main menu.
2. Select the department in which the list is used.
3. The Lists setup form is displayed. Click the applicable tab. The Lists setup form containing a list of the tab subject is displayed.
4. Select a list item and click the **Print** button. The Report Selection form is displayed.
5. Click **Preview** to view the report on-screen.
6. Click the **Print** icon in the Report Viewer to print the report.

Lists > Contact Manager

When you navigate to Lists > Contact Manager, the Setup - Contact Manager Lists form is displayed. Add, edit, delete, disable, and print Contact Manager lists from the following tabs:

- Academic Record Information
- Activities
- Activity Categories
- Activity Results
- Activity Status
- Address Types
- Document Status
- Documents
- Document Lists
- Incident Type
- SMS Service Provider
- Visas

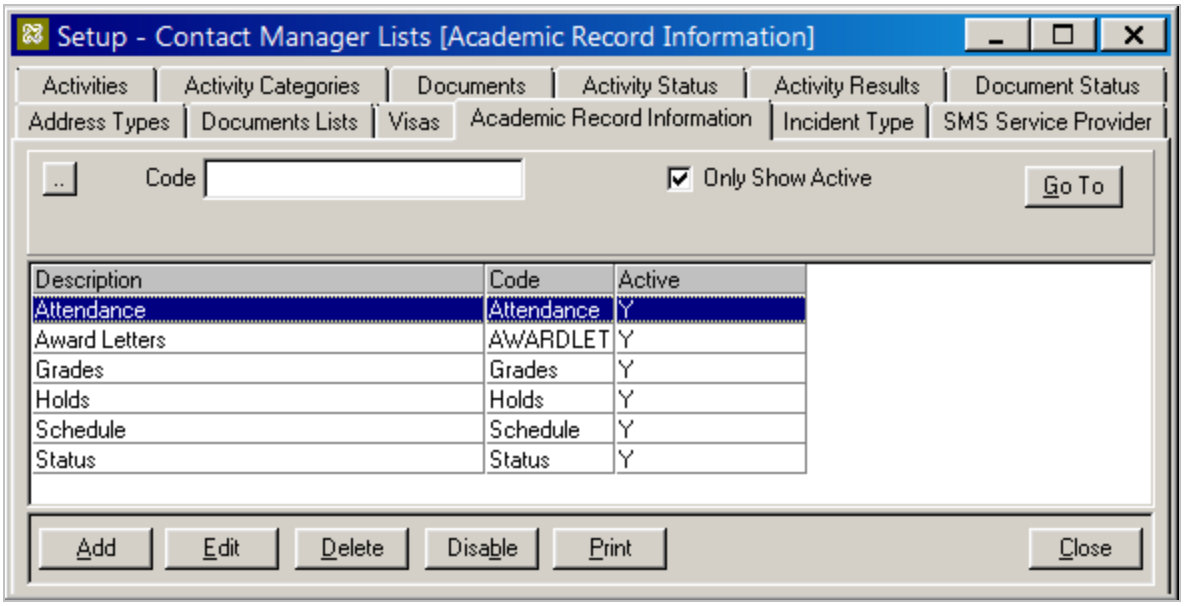
See Maintaining Lists for instructions on adding, editing, deleting, disabling, enabling, and printing lists.

Setup - Contact Manager Lists [Academic Record Information]

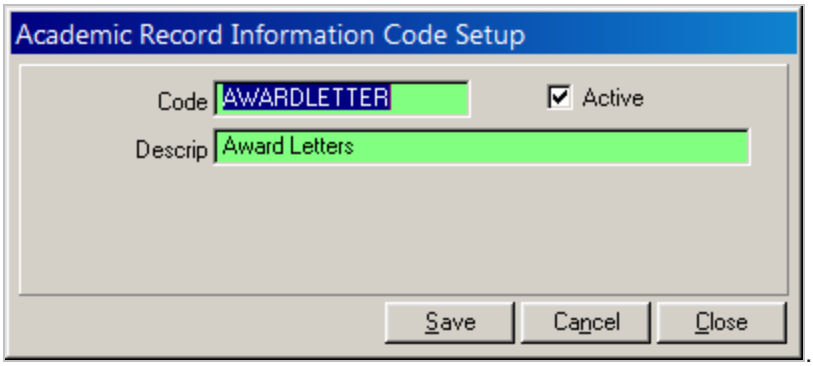
The Academic Record Information tab of the Contact Manager Lists form enables institutions to create proprietary academic record information that is more meaningful than the default selections. Grades, Holds, Status, Attendance, and Schedule are designated as system academic records as defined by the FERPA Act.

To add or edit a list of academic record information codes:

1. Navigate to **Lists** > **Contact Manager**. The Setup - Contact Manager Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Academic Record Information**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Academic Record Information Code Setup form is displayed.



6. Specify a unique **Code**.
7. Enter a **Description**.

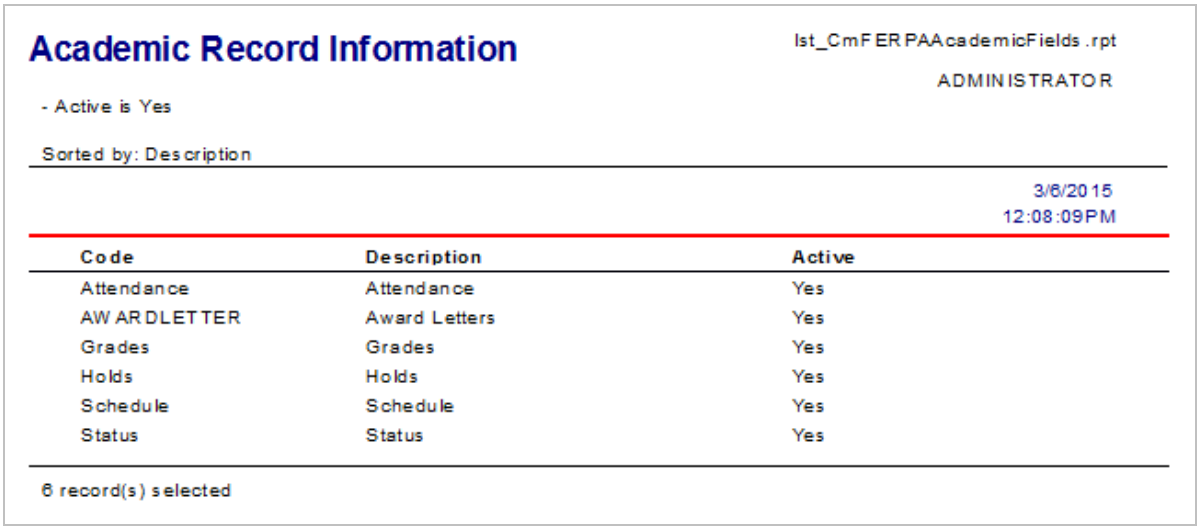
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

To print a list of academic record information codes:

1. Click **Print** on the Setup - Contact Manager Lists [Academic Record Information] form. The Report Selection form is displayed.
2. Select appropriate options on the Selection tab.

   Select or clear **Yes** or **No** next to the Active label. If you select Yes, active records are listed on the report. If you select No, inactive records are listed. If you select both, active and inactive records are listed.

   If no records match the selection criteria, the message *"No records selected for the report"* is displayed.
3. Click **Preview**. The report is assembled and displayed in the Report Viewer. The report contains the Code, Description, and Active indicator.



Academic Record Information

lst_CmFERPAAcademicFields.rpt

ADMINISTRATOR

- Active is Yes

Sorted by: Description

3/6/2015
12:08:09PM

Code	Description	Active
Attendance	Attendance	Yes
AWARDLETTER	Award Letters	Yes
Grades	Grades	Yes
Holds	Holds	Yes
Schedule	Schedule	Yes
Status	Status	Yes

6 record(s) selected

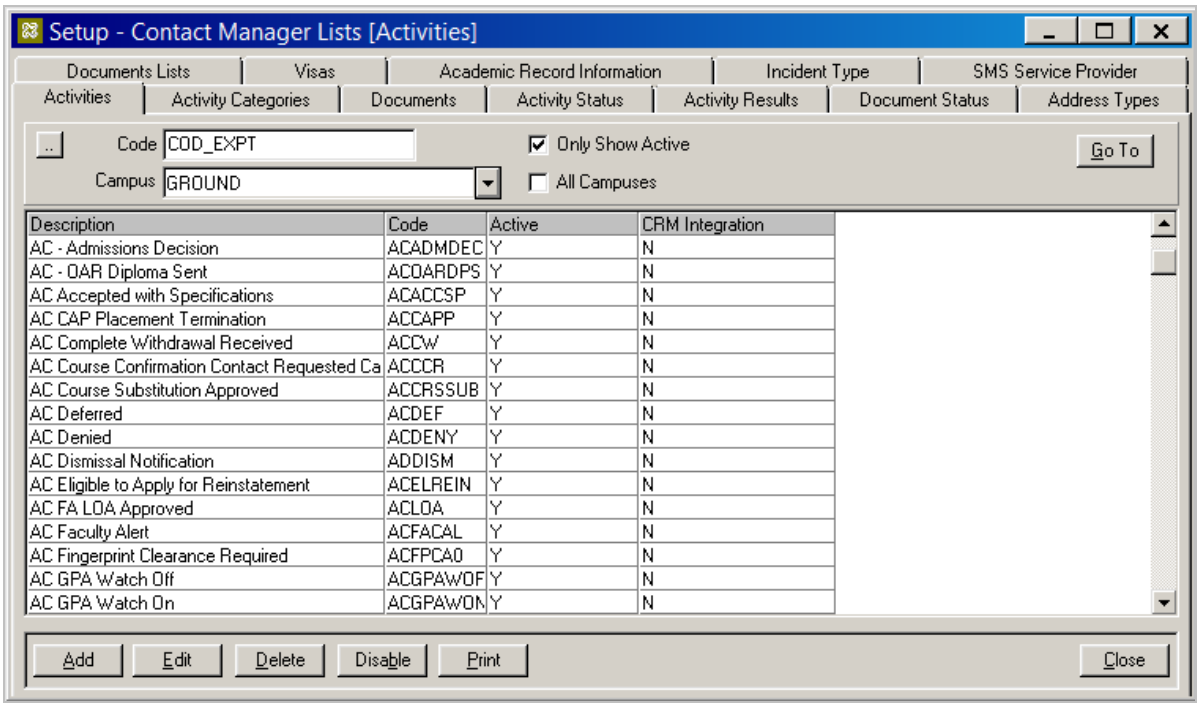
4. See Report Viewer for instructions on printing or exporting the report.

Setup - Contact Manager Lists [Activities]

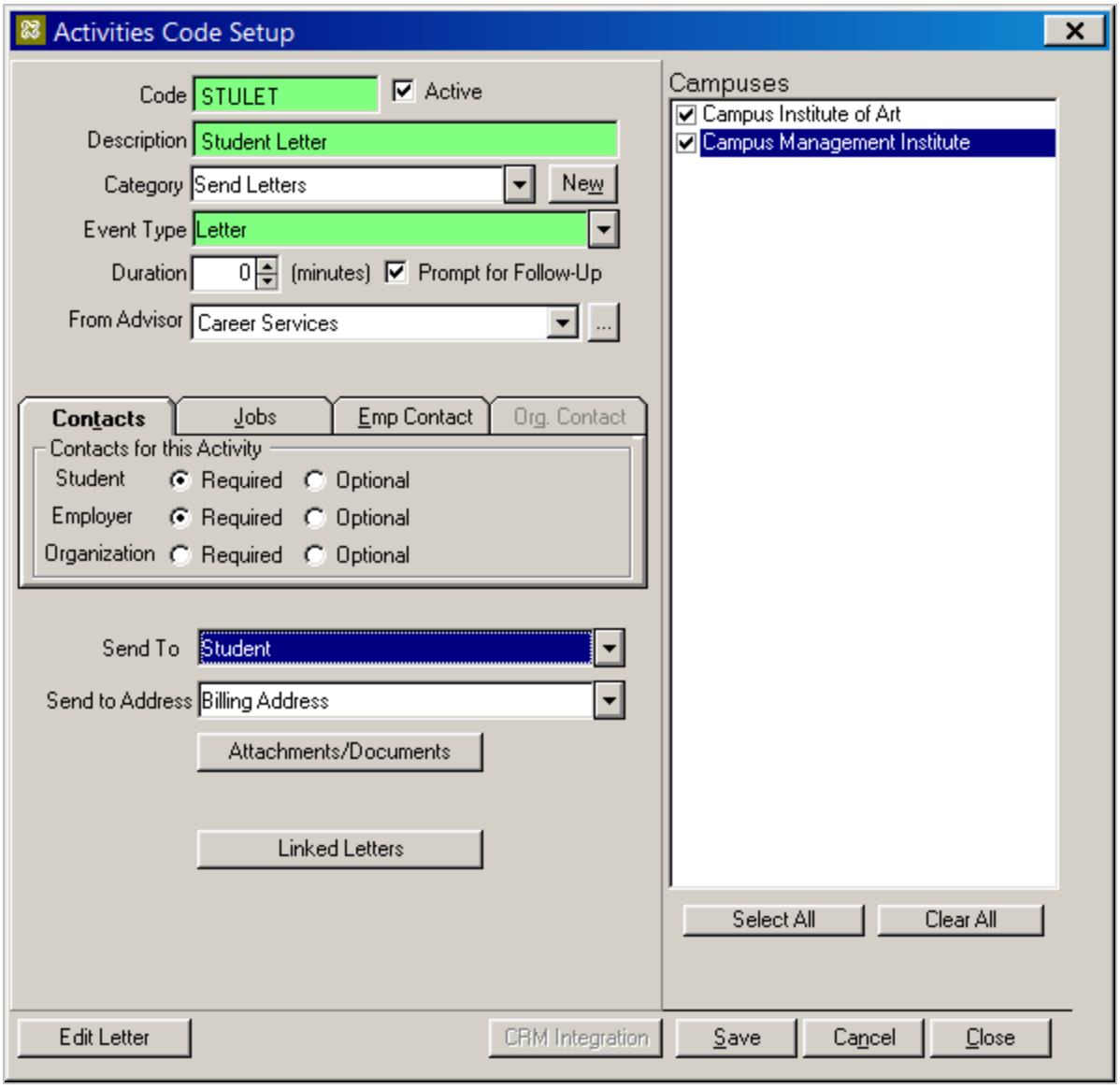
The Setup - Contact Manager Lists [Activities] form is used to define the properties of Activities. Staff members perform activities associated with tasks or events in the life of a lead, prospect, student, employer, or staff member at specific campuses. Activities can be triggered by an event or condition in CampusNexus Student. The triggering effect is controlled by the Activity Scheduler.

To add or edit an activity code:

1. Navigate to **Lists** > **Contact Manager**. The Setup - Contact Manager Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Activities**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
6. Click **Add**, or select a record and click **Edit**. The Activities Code Setup form for the selected activity is displayed ('Student Letter' in our example).



Notes:

- Student Letter (STULET) is set to 'Y' on the Setup - Contact Manager Lists [Activities] form to enable the Mail Merge feature on the Report Viewer menu bar.
- The fields in this example relate to the Letter activity type (Event Type). For information on other types, see Examples of Other Activity Types.
- Depending on the selected activity type, different fields and tabs are displayed on the Activities Code Setup form.

7. Specify a unique **Code**.

   Note: The Code is used as the file name for an associated letter activity.

8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Enter a **Description**.

10. Select a **Category**, or click to create a new Activity Category.
11. Select an **Event Type**. Event Types (also known as Activity Types) are defined by CampusNexus Student and are not maintained by users.
12. Specify the estimated **Duration** of the activity in minutes.
13. Select an advisor in the **From Advisor** field. Click to select multiple advisors.
14. If the **Prompt for Follow-Up** check box is selected and you choose to close the activity without a follow-up, the following message is displayed: *"Are you sure you want to close this activity without scheduling a follow-up?"*
    - Choose **Yes** and close the activity without scheduling a follow-up activity.
    - Choose **No** and proceed to schedule the follow-up for it.
15. Select applicable options on the **Contacts**, **Jobs**, **Empl. Contact**, and **Org. Contact** tabs.
    - Select whether the activity is **Required** or **Optional**. On the Contacts tab, select an option for both employer and student. When you select Required or Optional for the employer, CampusNexus Student prompts you to select the employer.
    - Click Setup Questions/Script to create a script containing questions that can be followed by your staff for meetings, incoming phone call, and outgoing phone call activities.
16. Select one or more **Campuses**. If you try to edit or disable an activity that is not assigned to a campus to which you have access, CampusNexus Student prevents you from doing so.
17. Select Student, Employer, or Organization from the **Send To** list.

    Send to Student

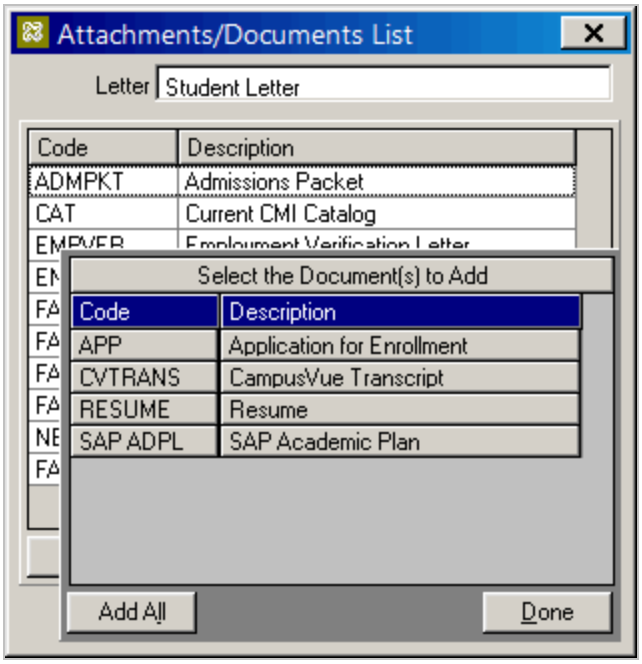
    a. Select **Student** from the Send To list. If the activity is a letter to an employer, the list of mail merge fields in Word changes to employer information when editing and merging the letter.

    b. The **Send to Address** field is displayed only if Student is selected from the Send To list and the Event Type is Letter. This option enables you to choose an address when sending letters to students, without having to change the default address in the student's address folder.

    c. Click **Attachments/Documents** to create a list of attachment or documents to be packaged with the letter and sent to the recipient. When you print the Activities Code list, the Attachments/Documents associated with each letter are also listed.

    Note: The Attachments/Documents button does not appear on a new Activity form until you click Save.

    d. Click **Add** on the Attachments/Documents Lists form and select the documents to be added. Click **Add All** to select all items.



e. Click **Done** and **Close** to return to the Activities Code Setup form.

Send to Employer

a. Select **Employer** from the Send To list. The list of mail merge fields in Word changes to employer information when editing and merging the letter. The Send to Address field and Attachments/Documents options are not available for Employers.

Note: Letters to employers are printed from **Daily > Career Services > Print Employer Letters**.

Send to Organization

a. Select **Organization** from the Send To list. The organization's contact person receives the event type such as email, letter, etc.

b. Select the **Organization Type**. The Organization Type field appears only if Organization was selected from the Send To list and the Event Type is Letter or Email to Organization. The option currently only selects High School.

c. Click **Attachments/Documents** to create a list of attachments or documents that are to be packaged with the letter and sent to the recipient. If you print the Activities Code list, the Attachments/Documents associated with each letter are also listed.

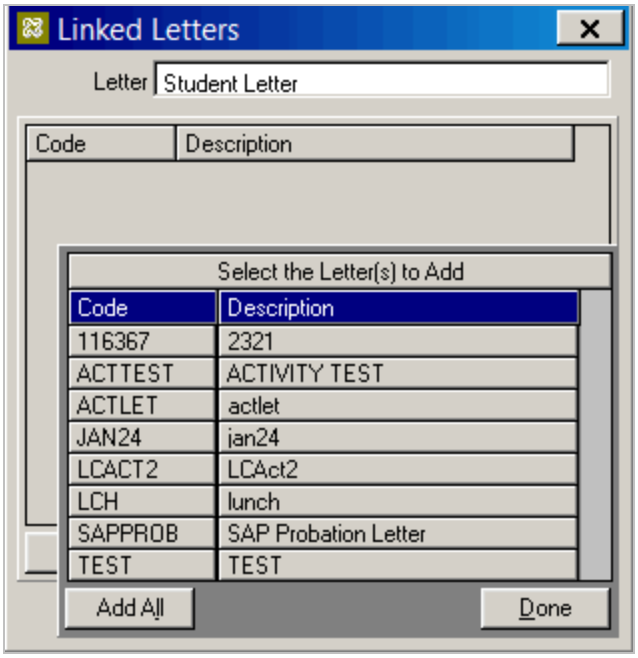
Note: The Attachments/Documents button does not appear on a new Activity form until you click Save.

d. Click the **Linked Letters** link to view a form that enables you to add or remove letter activities that may be associated with this activity.

18. When setting up or editing a letter, click **Linked Letters** to view and edit the list of materials that are to be gathered and sent with the letter when it is printed, or link other letters or documents to the one that you are setting up. When the student or employer letter you are setting up is printed, the linked letters, labels, documents, and so on are also printed.

Note: The Linked Letters button does not appear when you are creating a new activity. The button is displayed when you Save an activity and select it from the Activities list to return to the Activities Code Setup form.

a. Click **Add** to add documents. A list of available letters that may be linked is displayed.



b. Click on a letter in the list or click **Add All** and click **Done**. CampusNexus Student adds the items to the Linked Letters lists.

c. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

19. Depending on the activity, the Edit Letter or HTML Editor button is displayed.

Edit Letter

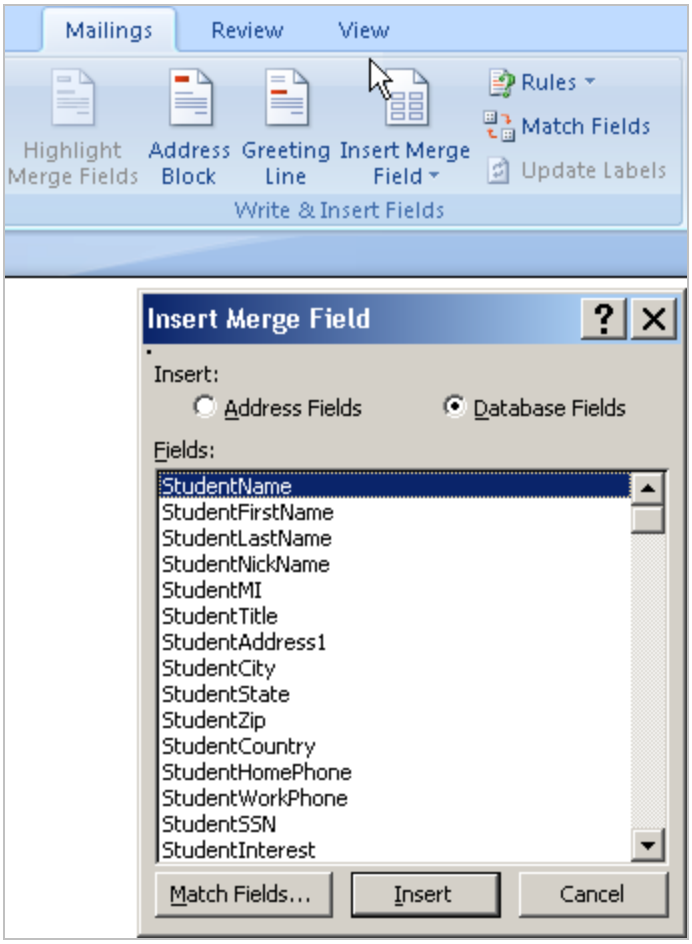
a. Click **Edit Letter** on the Activities Code Setup form. CampusNexus Student starts Microsoft Word and opens the file containing the letter associated with the activity.

Note: CampusNexus Student version 15.2 or later supports the `.docx` extension for Microsoft Word files.

If you created a `.doc` file and `.docx` file for the same Activity Code, for example *Program_Start.doc* and *Program_Start.docx*, remove one of the files from the server where the files are stored to enable CampusNexus Student to open the correct file for the selected Activity Code.

b. CampusNexus Student address and database fields can be incorporated into letters. See Mail Merge Codes

for a complete listing of mail merge codes available for letter activities.



HTML Editor

- See Creating HTML Email for an example of using the HTML editor.

20. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Examples of Other Activity Types

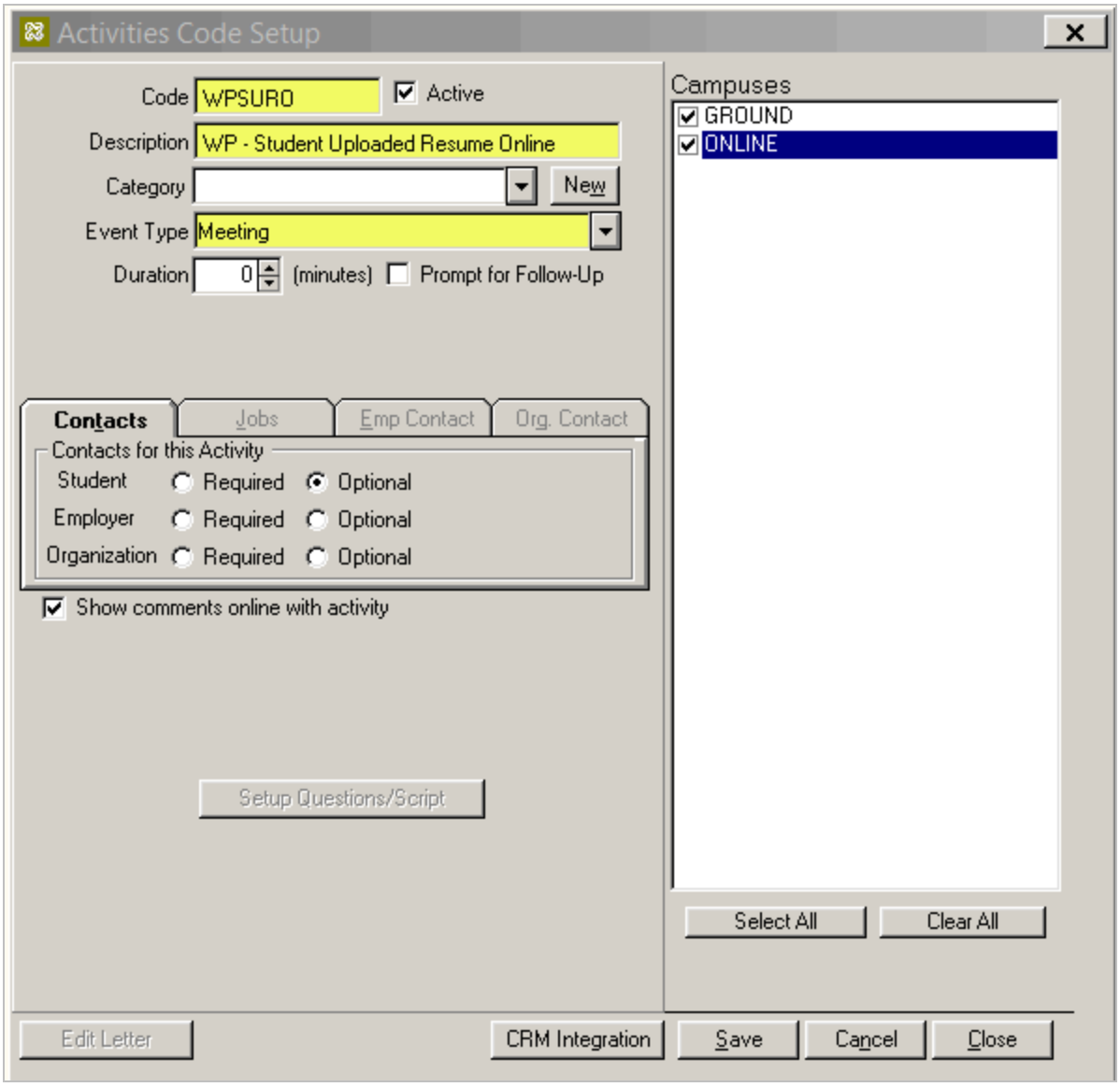
Other types of activities include:

- Outgoing Phone Call
- Incoming Phone Call
- Meeting
- Incident
- Message
- Other Task
- SMS-Text Message
- Email
  - Student Email
  - Staff to Employer Email
- Waitlist Activities
- Web Alert
- Auto Disb. Cancellation/Disb. to Re-expect Alert

Meeting

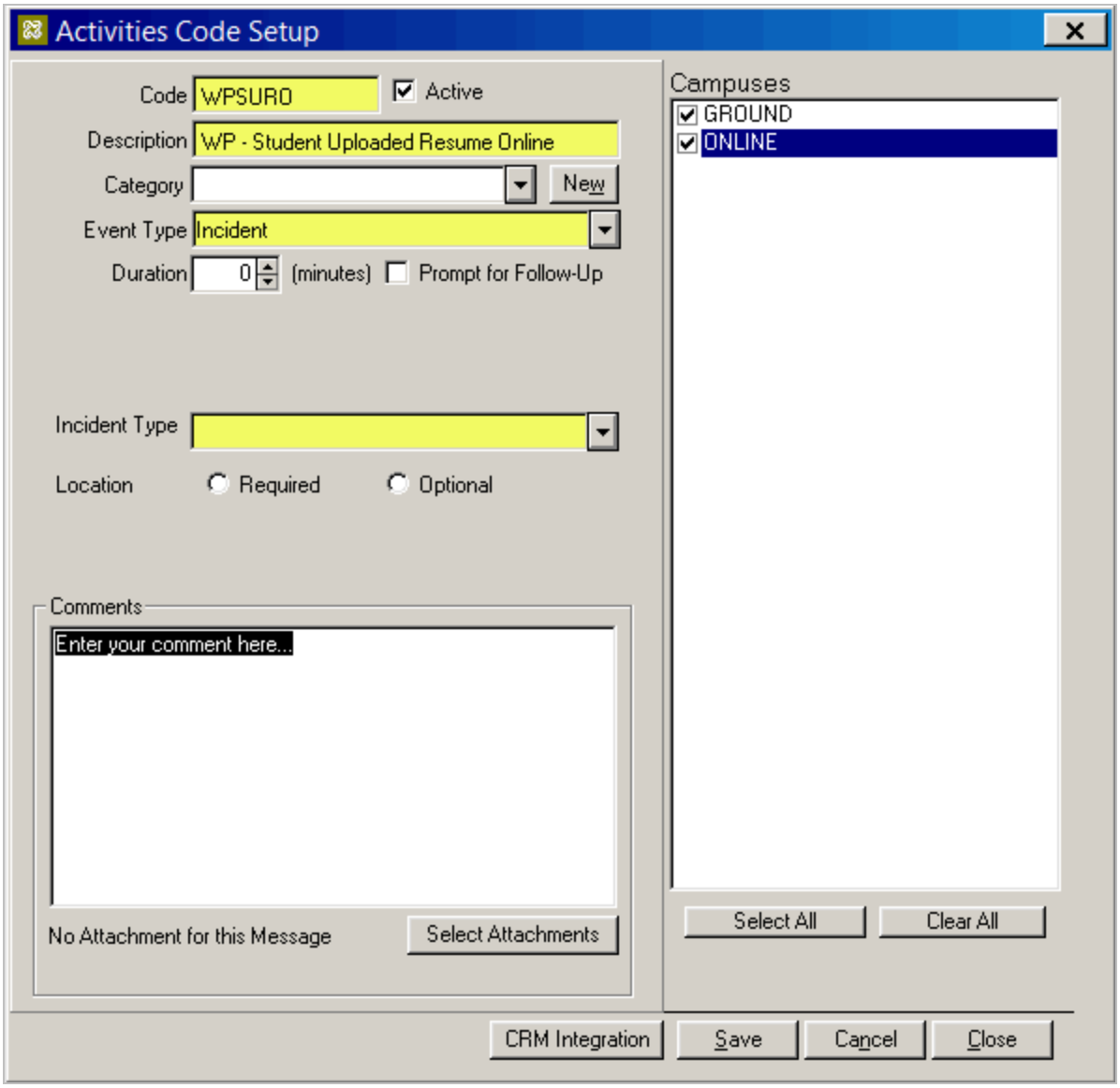
A meeting activity enables staff members to enter comments for the upcoming meeting activity and use those comments as reminders to themselves.

Select **Show comments online with activity** to enable students to view the comments in Portal.



Incident

You can track student conduct violations that need to be included in the Jeanne Clery Campus Crime Report. This report is a federally required statistical reporting of all crimes and student conduct violations that occur within the population of students on a campus. See Incident Types for details on creating types of incidents for the Activities codes.



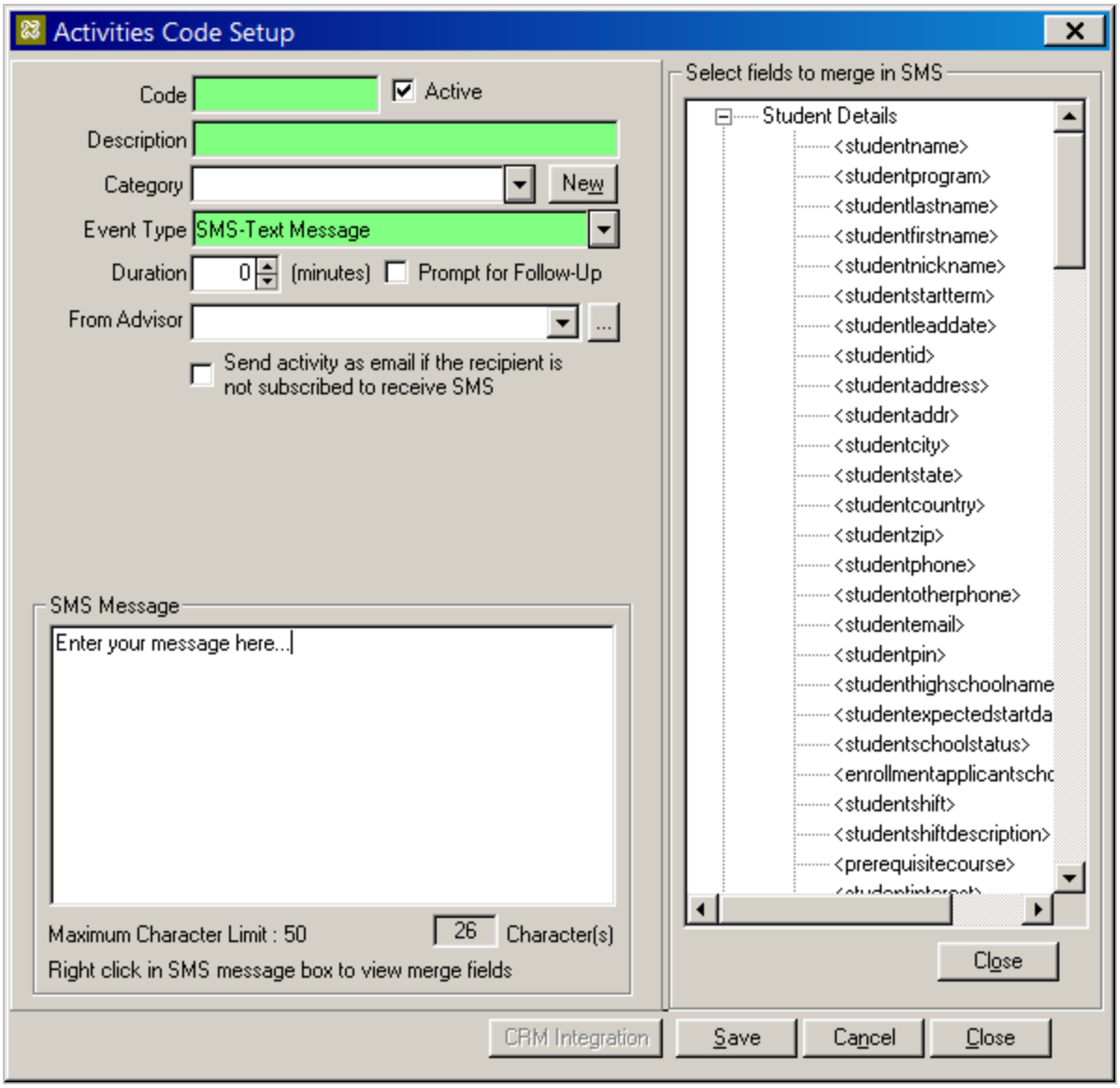
SMS-Text Message

The following requirements must be in place for students to receive SMS text messages:

- The student must have a mobile phone number on file on the Student Master form.
- An SMS service provider must be selected.
- The 'Subscribe to SMS Service' check box must be selected under SMS Preference on the Contact Method form (Contact Manager).

  If the check box is selected, the student has subscribed to receive text messages from the school. If the check box is not selected, the student has not subscribed or has unsubscribed and does not want to receive text messages from the school. Students can use Portal to subscribe and unsubscribe.

Define Contact Manager activities using the Event Type **SMS-Text Message** on the Activities Code Setup form.



Create your message in the SMS Message box. **Right-click** inside the message box to view the merge fields. **Double-click** a merge field to insert it into the message.

You can schedule an activity with an event type of SMS for a student.

Select **Send activity as email if the recipient is not subscribed to receive SMS** to specify that email is to be sent to students who have not subscribed to receive SMS for this activity.

- If the student did not subscribe to receiving SMS and the **Send activity as email ...** check box is selected, an email is sent in place of an SMS message.
- If the student did not subscribe to receiving SMS and the **Send activity as email ...** check box is **not** selected, a message indicates that the student has not subscribed for this service and you must cancel.

You can schedule an activity with an event type of SMS for a student group.

- If any students in the group did not subscribe to receiving SMS and the **Send activity as email ...** check box is selected, an email is sent in place of an SMS. CampusNexus Student sends the activity only to students who subscribed to SMS.

- If any students in the group did not subscribe to receiving SMS and the **Send activity as email ...** check box is **not** selected, a message indicates that some students have not subscribed for this service. Some of the intended recipients are not notified before you save and close the activity. CampusNexus Student sends the activity only to students who have subscribed to SMS. Run an Activity Report to determine which students were not notified.

Since most SMS service providers have a character limit, CampusNexus Student verifies the limit established for that campus under the setup of the SMS Service Provider. You can view the Maximum Character Limit allowed under the message box. Next to the Maximum Character Limit, in the Character(s) box, the number of characters typed is displayed as you create the message. A red warning message is displayed stating that text will be truncated if you exceed the maximum character limit.

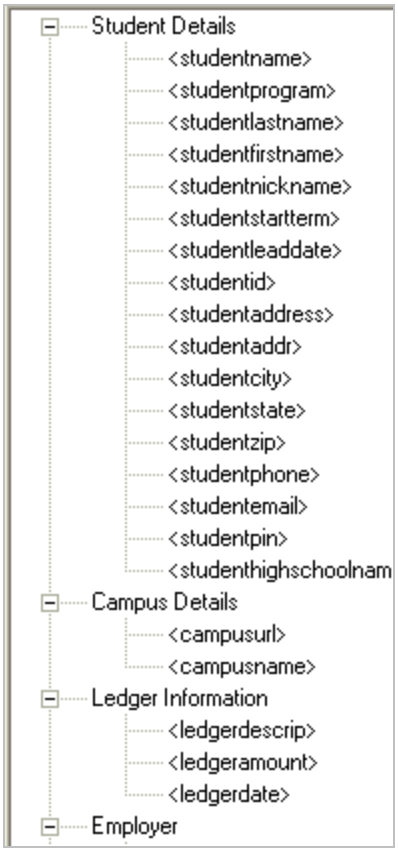
Email

Before an email can be sent, you need to set up some email parameters. You also need to select an Event Type before you can view the field that allows you to enter the main text of the email message.

To include mail merge fields in the body of your email, **right-click** inside the text box where you are entering the main body of the email. A list of fields (mail merge codes) available for the email is displayed. These are used to merge data from CampusNexus Student into emails, letters, labels, and other documents created in Microsoft Word. The data fields can range from a simple name field to a complex data table of financial aid data. **Double-click** a merge field to insert it into the message.

Note: See the topic Mail Merge Codes for a complete listing of mail merge codes available for email activities.

When embedding these variables in your message, enter them as shown in the list below. CampusNexus Student substitutes data from the Student Master records. Letters can be either uppercase or lowercase, but be sure to include the angle brackets < and > before and after the variables and no spaces within the field name. For example:



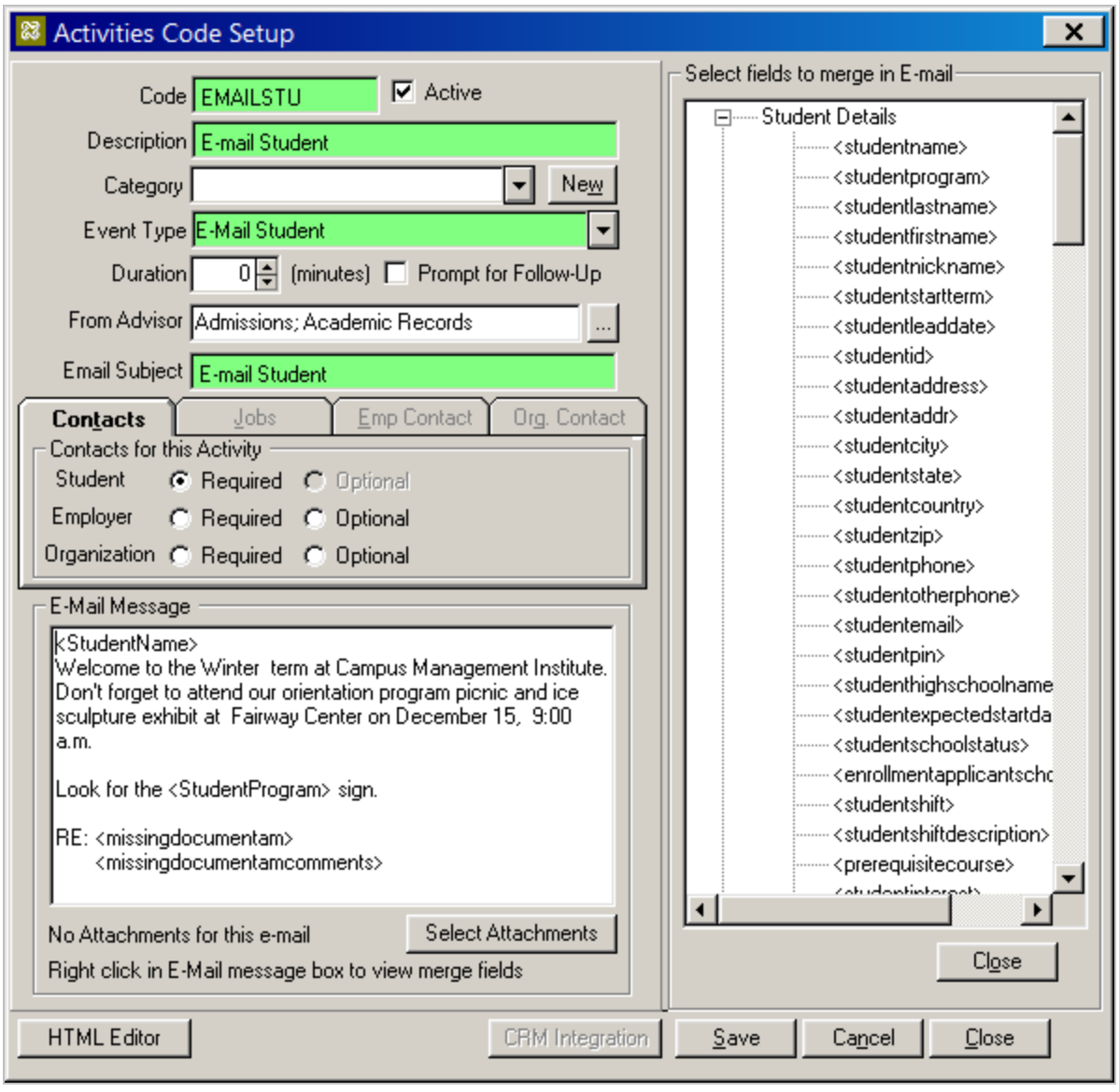
Student Email

When you add or edit an activity that has an email event type, an outgoing subject line, which you define, is added to the Activity form. The outgoing email subject line is automatically displayed on the Activity form. If you select the template from the Activity

Trigger form (Daily > Contact Manager > Schedule Activities), the outgoing subject line is displayed on the email when the scheduled activity is triggered.

The **Email Subject** line is a required field which can be edited as needed.

To choose which groups of students should receive the email, **right-click** in the email message box. A list of mail merge fields is displayed in the right hand box. **Double-click** a merge field to insert it into the message. Select appropriate groups of students who will receive this email.



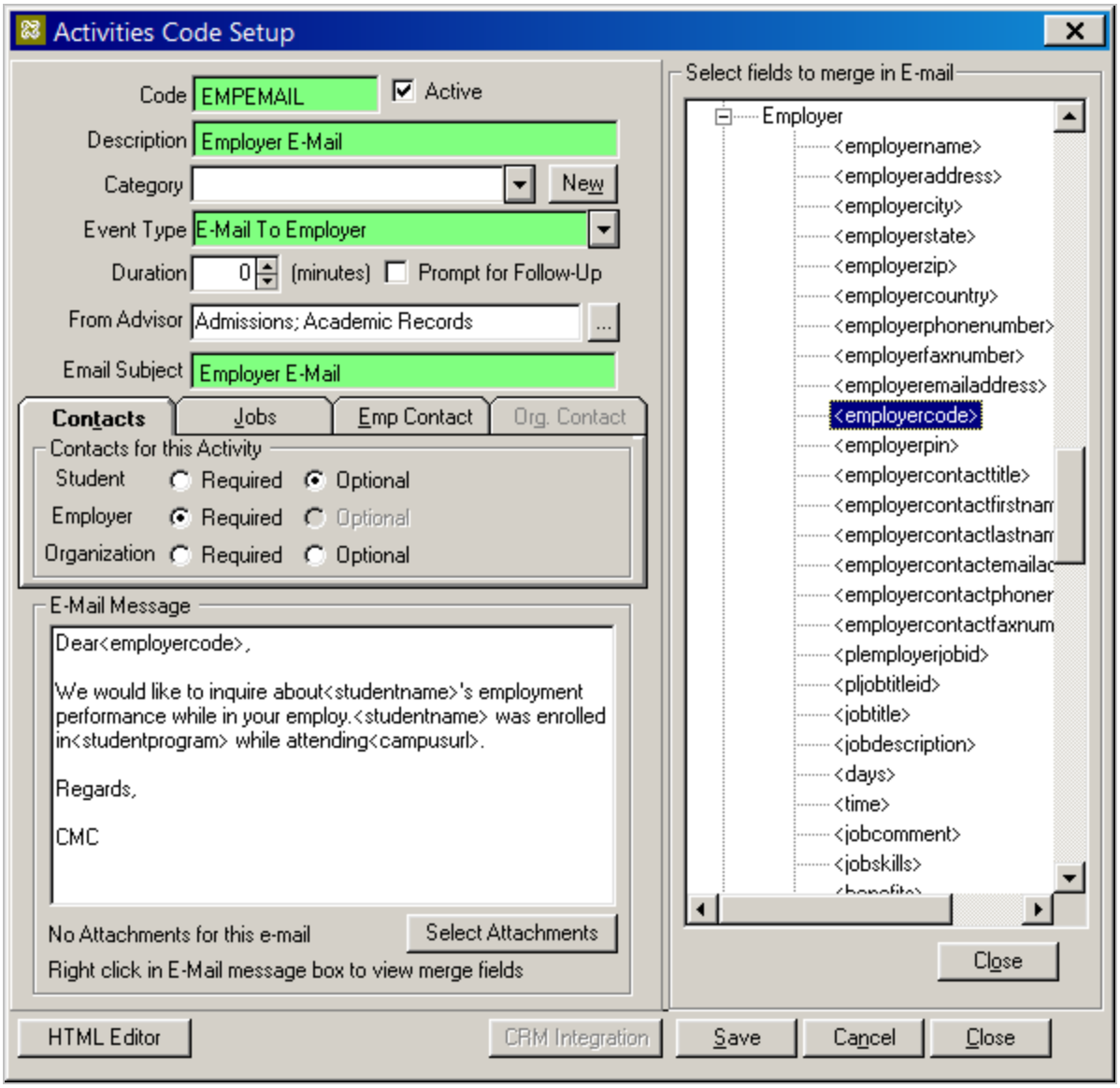
To modify the HTML code, click the **HTML Editor** button. CampusNexus Student supports common HTML tags (see Creating HTML email).

To add attachments to the email, click **Select Attachments** and browse for the attachment.

Staff to Employer Email

Select the **Email to Employer** Event Type.

Right-click in the email message box to obtain a list of mail merge codes available for the email. **Double-click** a merge field to insert it into the message.



Notice that the employercode, studentname, studentprogram, and campusurl fields were selected and incorporated into the email.

To modify the HTML code, click the **HTML Editor** button.

Click **Select Attachments** to attach a file to the letter.

Select **Required** or **Optional** on the Jobs tab and Emp. Contact tab.

Web Alert

Web alerts are emails sent to individual students, groups of students, school staff, and employers. You can create Student Alerts as Contact Manager activities. Student Alerts also provide a means to validate receipt of messages.

1. Select **Student Alert** on the Setup - Contact Manager Lists [Activities] form.
2. Select one or more **Campuses**.
3. The **Durations** fields are not applicable to this activity. Do not select the duration and follow-up.

4. Select contacts for this activity. Select **Student**. If the activity pertains to placement, select **Employer** as well.
5. Assign this activity to a staff member. See Adding Activities by Student Groups.

To assign a web alert as an activity:

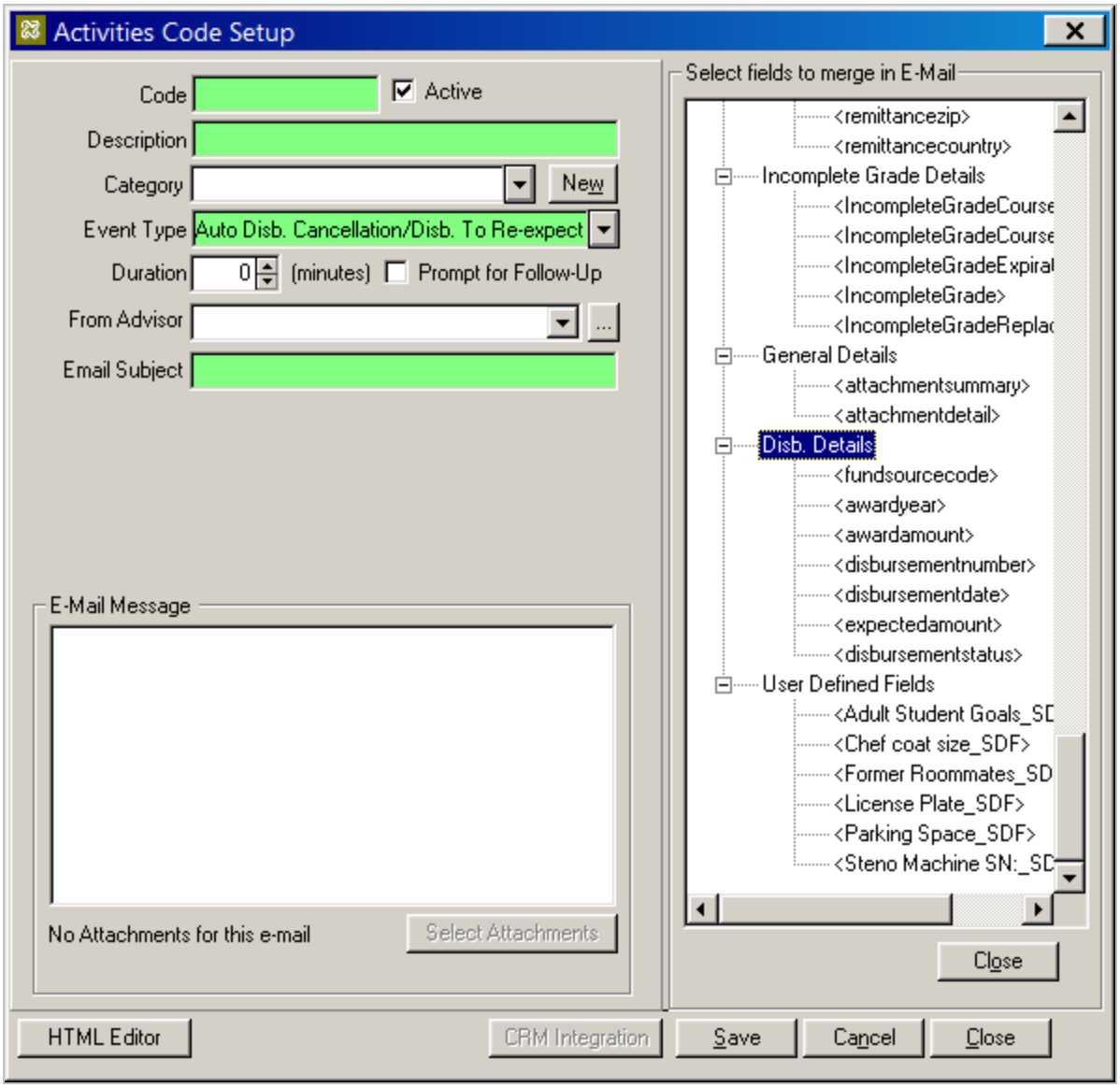
1. Navigate to **Contact Manager** > **Activities**.
2. Click **Add Activity**. The Activity form is displayed.
3. Select the **Staff Member**,**Type of Activity**, and **Student Group** who will receive the Web Alert from the lists.
4. Select the **Subject**, **Dates**, **Activity Status**, and **Priority Level**. Use the free-type field to enter a description of the email you are assigning.
5. Click **Save**. The Web Alert is saved to the Activities List of the staff member to whom you have assigned this task.

Students can check for web alerts and other school correspondence when they log on to their pages on the school website.

Auto Disb. Cancellation/Disb. to Re-expect Alert

The Event Type **Auto Disb. Cancellation/Disb. To Re-expect Alert** is an email type event that is available for sending notifications to associated staff if a disbursement is cancelled or a cancelled disbursement is moved back to the associated award year range by the Student Pace Evaluation (SPE) tool.

For additional information on disbursement cancellation and notification of assigned staff members in such cases, refer to the topics on SPE tool logic and Disbursement Alerts.



Right-click in the email message box to obtain a list of mail merge codes available for the email.

Several merge field codes are available specifically for the Auto Disb. Cancellation/Disb. To Re-expect Alert event type (merge field group **Disb. Details**):

- Fund Source Code
- Award Year
- Award Amount
- Disbursement Number
- Disbursement Date
- Expected Amount
- Disbursement Status

See Mail Merge Codes for a complete listing of mail merge codes available for email and letter activities in CampusNexus Student.

Double-click a merge field to insert it into the message.

Creating HTML Email

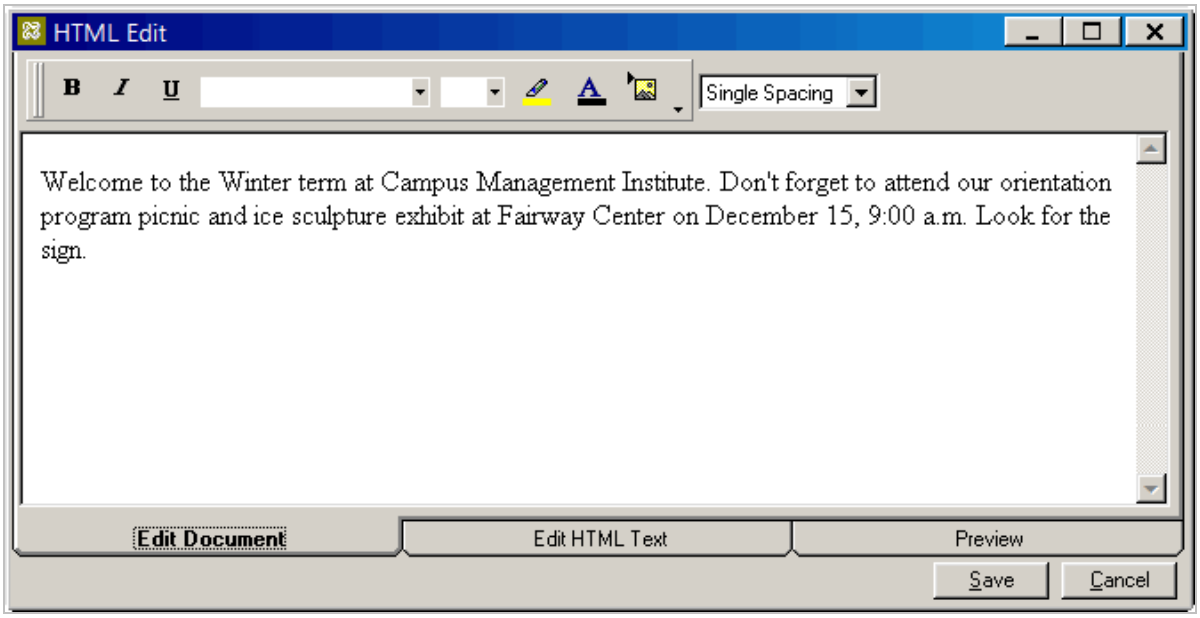
1. Navigate to **Setup** > **Contact Manager** > Email and select the Email Format **HTML**.
2. Navigate to **Lists** > **Contact Manager** > Activities, add or edit an activity with an **Event Type** of 'Email Student'.
3. Insert the email text in the **Email Message** box.
4. Click **Save**.
5. To send the email message to a single student, select the student and add the **Student Email** activity to the student's activity list.
6. Click **Save**. The email message is sent and a row is added to the student's list of activities. The staff member assigned to send the email can then close the activity.

   If you add (schedule) an email activity for the group, the message is sent to all members of the group when the activity is saved and an activity is added the student contact history tables.

   If you create a scheduled email activity, when the conditions of the scheduled event are met, the email message is sent to the targeted student or group.

HTML Editor

You can modify, preview, or edit the HTML code directly for emails using the HTML Editor.



The following are common HTML tags that can be used in the Email Message box.

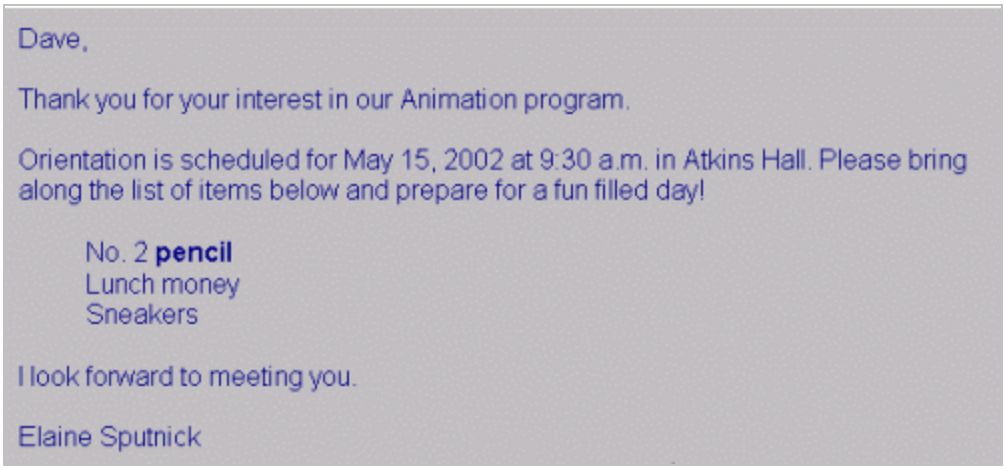
-
- <body bgcolor=?>
-
-
-
-
-
-
-

-
-

For example, if you enter the following text in the Email Message box:

```
<body bgcolor=silver>
<font color=navy>
<font face=Arial>
<p><StudentFirstName>,</p><br>
<p>Thank you for your interest in our <StudentProgram> program.</p>
<p>Orientation is scheduled for May 15, 2002 at 9:30 a.m. in Atkins Hall. Please bring along the
list of items below and prepare for a fun filled day!</p>
<ul><li>No. 2 <b>pencil</b></li>
<li>Lunch money</li>
<li>Sneakers</li></ul>
<p>I look forward to meeting you.</p><br>
<p>Elaine Sputnik</p></br></font>
```

The following email message is sent to the student:



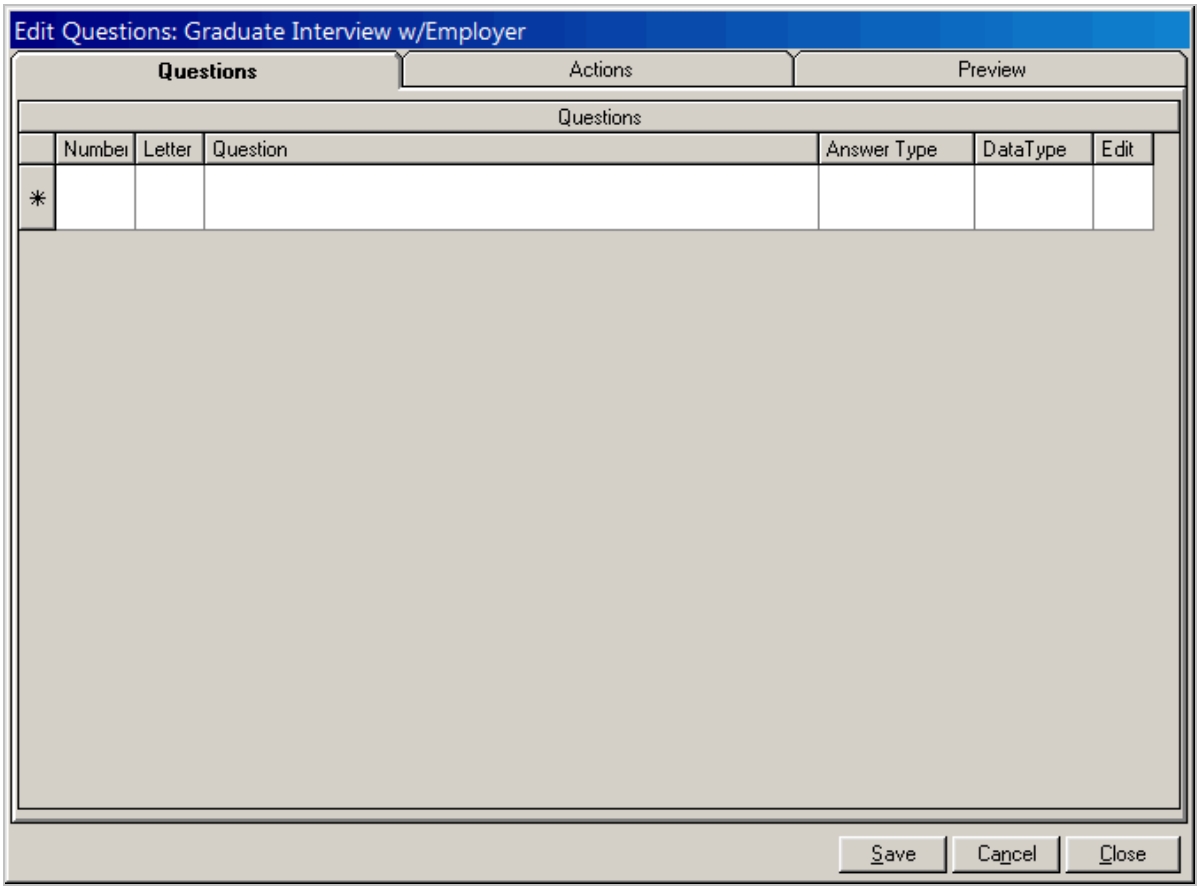
Setup Questions-Script

When you set up some activities in Contact Manager, you can define scripts or list of questions to be used by the staff member who will execute the activities. The purpose of this feature is to ensure that your school gets the information it requires, and the time spent is used efficiently. The types of activities that can have a related script include:

- Telephone call
- Meeting
- E-mail
- Letter

To set up a script and/or questions for an activity:

1. Add or edit a telephone call, meeting, e-mail, or letter activity. See Setup - Contact Manager Lists [Activities].
2. Click **Setup Questions/Script**. The Edit Questions form is displayed.

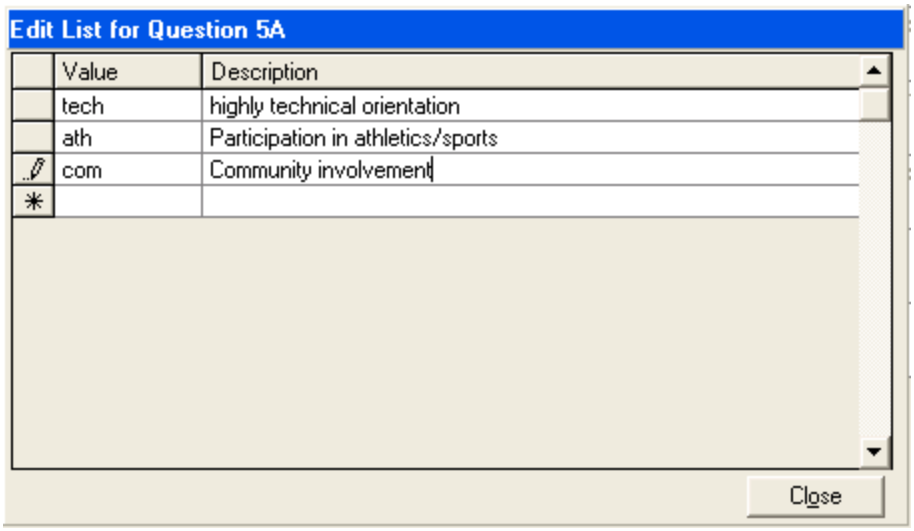


3. In the Questions tab, in the row marked with an asterisk, specify the following:
   - **Number** of the question
   - **Letter** of the question (optional)
   - **Question** text
4. In the same row, click the cell in the **Answer Type** column and click to see a list of answer types. Answer types include:

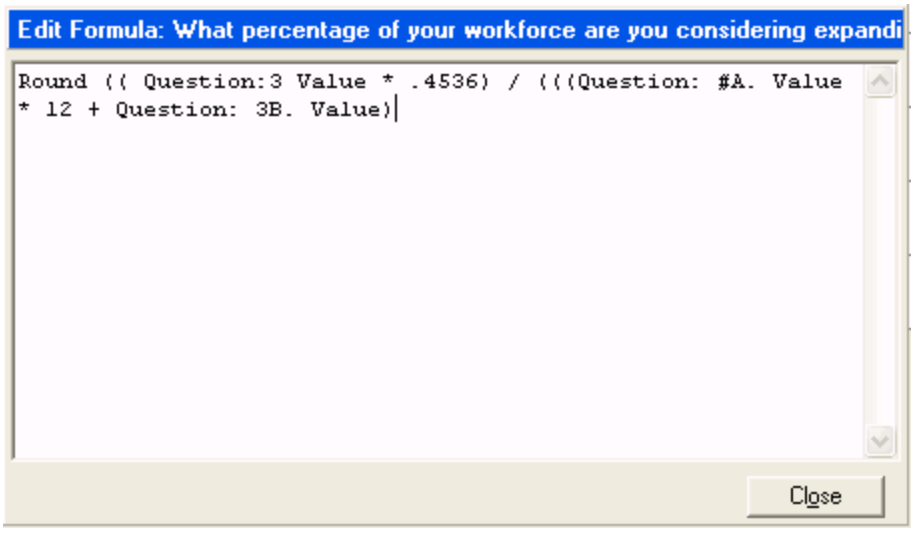
- Yes/No
- True/False
- List of Values
- Plain Text
- Calculation

5. When you select the answer type **List of Values**, click the **Edit** cell, and click the button that appears in the cell. The Edit List for Question form is displayed.

6. Enter the list **Values** and **Descriptions** for your question. Click **Close** to save the list.

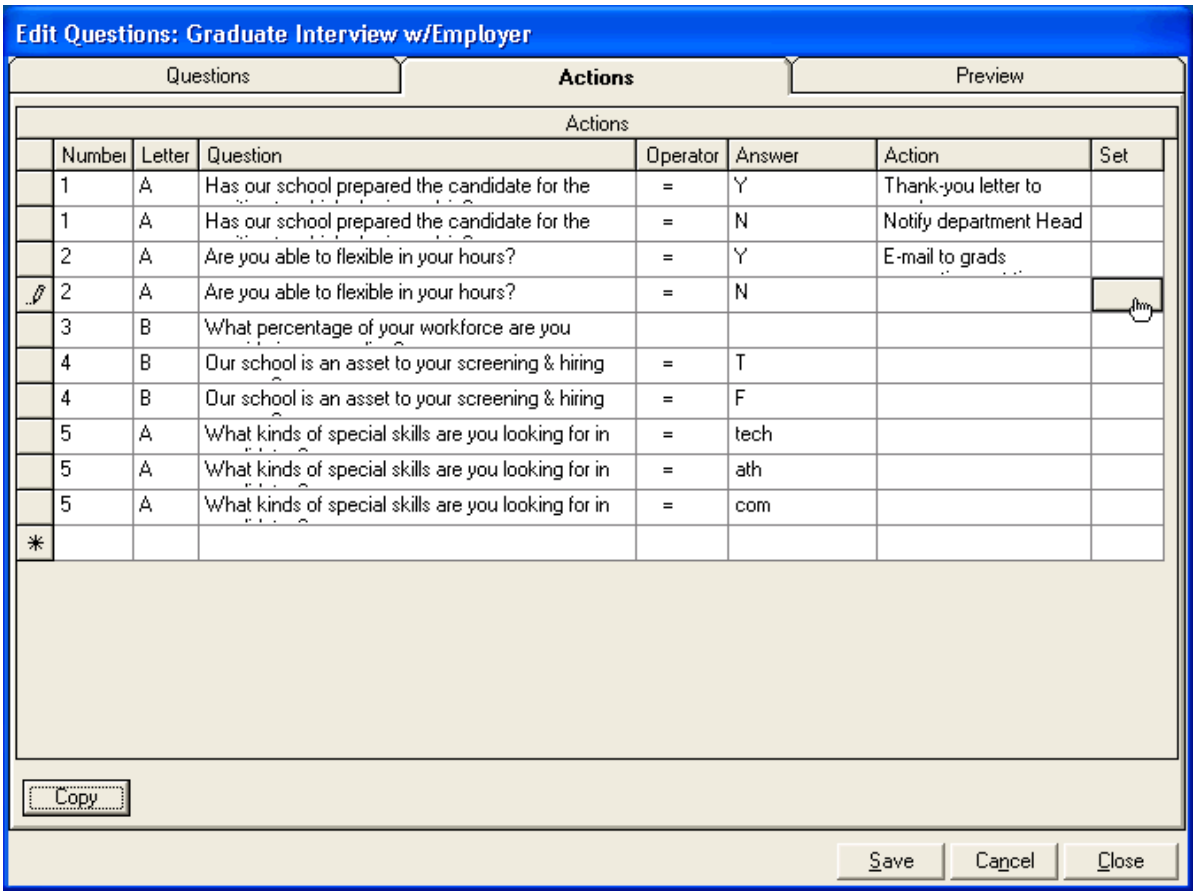


7. When you select the answer type **Calculation**, click the **Edit** cell, and click the button that appears in the cell. The Edit Formula form is displayed. The example below is a formula for calculating body mass using answers to previous questions. It is written in **VB Script** format. When you have entered your formula, click **Close** to save it.

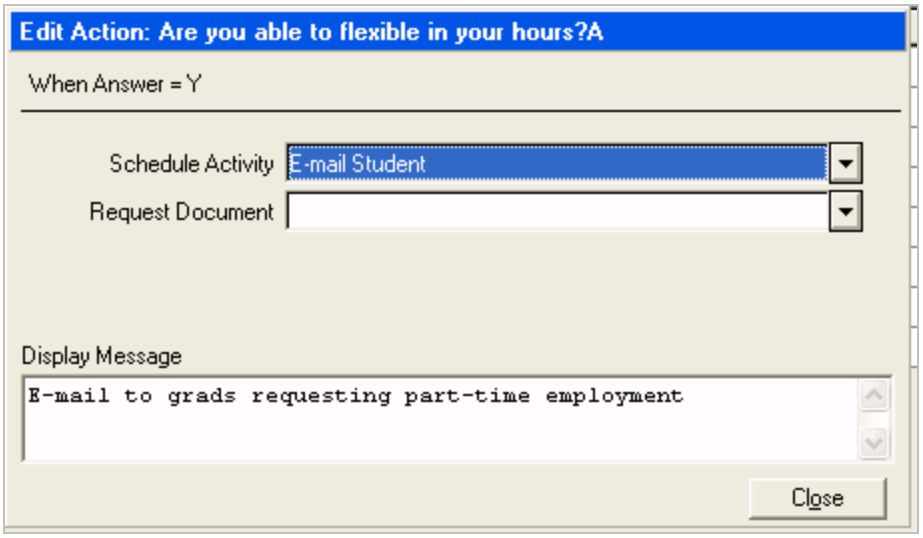


8. After you have entered all your questions, click **Save**.

9. Click the **Actions** tab to assign specific actions to the possible answers to your questions.

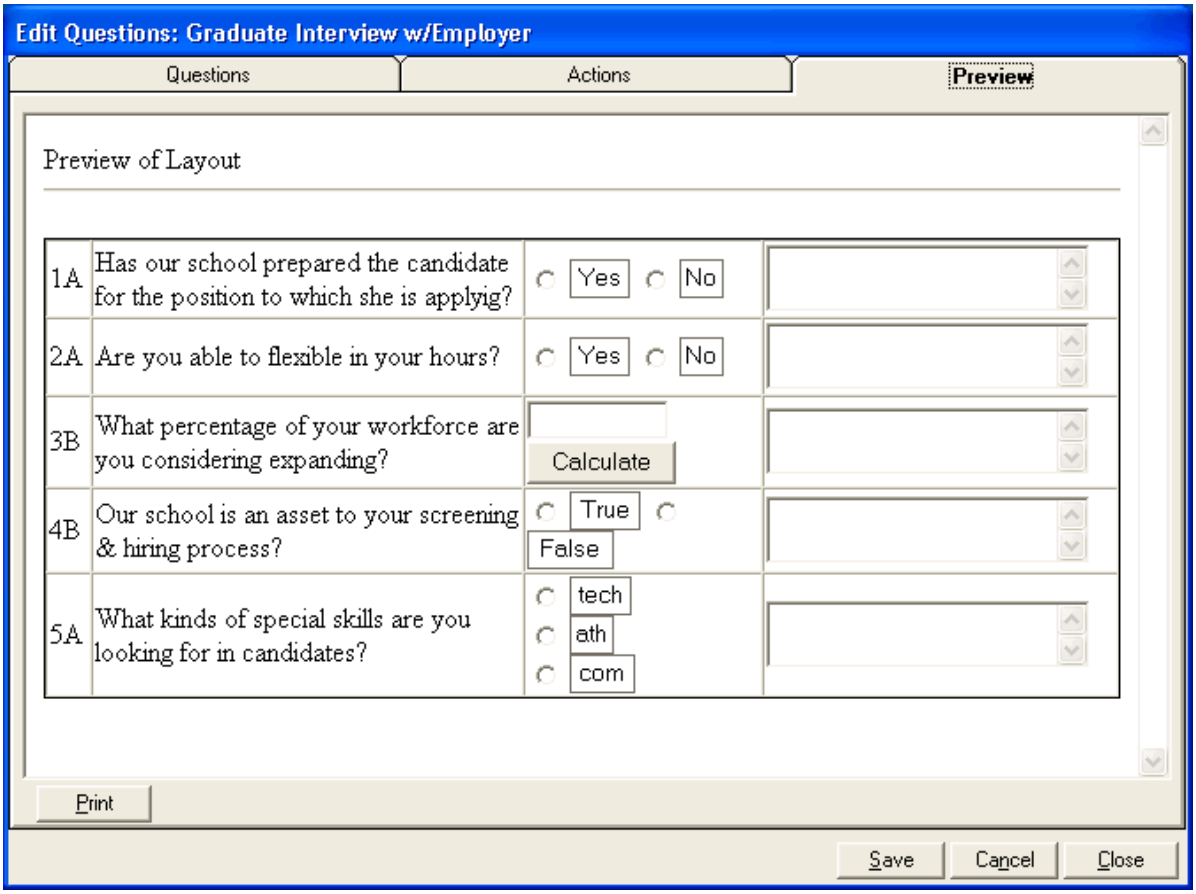


10. Click the **Set** cell to set up an action to be taken in response to the selected answer. The Edit Action form is displayed.



11. Select applicable options to schedule an activity, request a document, and/or display a message.
12. Click **Close** to save your Action selections.
13. Click **Preview** to see a preview of your script layout. The questions and listed answers are displayed as designed

on the Questions and Actions tabs.



14. Click **Print** to print a copy of the questions and answers.
15. Click **Save** to save any additions or changes to your script.
16. Click **Close** to close the form.

Close Activity

The Close Activity form shows the script as it appears when you are working with the Contact Manager. When you close an activity, the Close Activity form displays a Call Script button.

Click the **Call Script** button to see the Close Activity form. The staff member completes the form as the telephone conversation progresses. When the script is completed and saved,CampusNexus Student schedules the designated activities for the new lead.

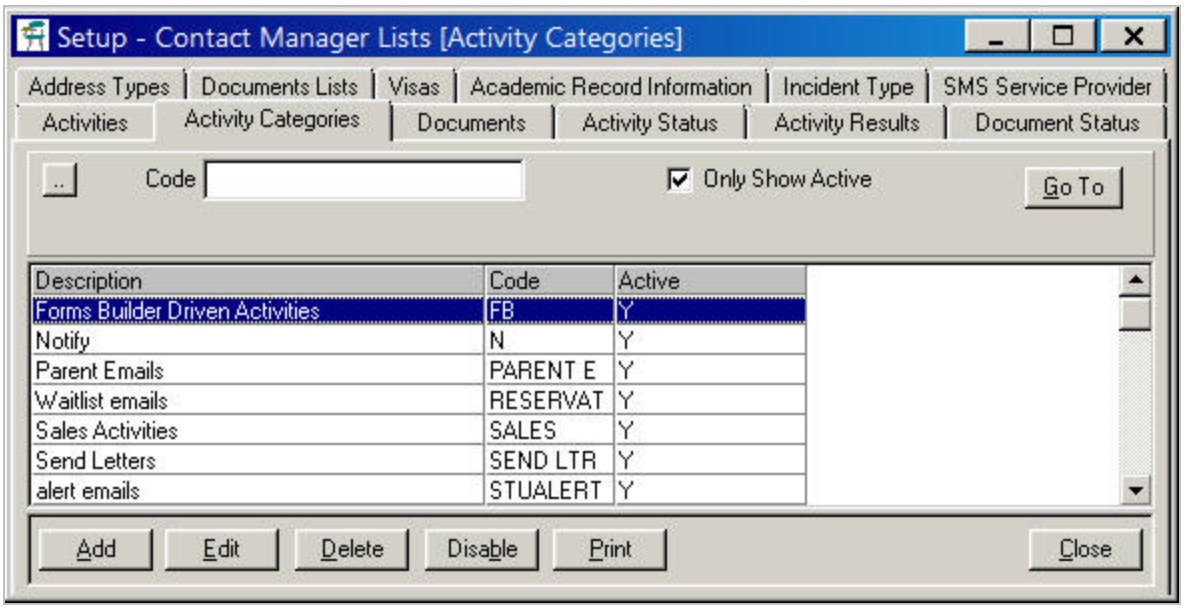
For detailed information on closing an activity, see Daily > Contact Manager > Contact Manager > Activities > Close Activity.

Setup - Contact Manager Lists [Activity Categories]

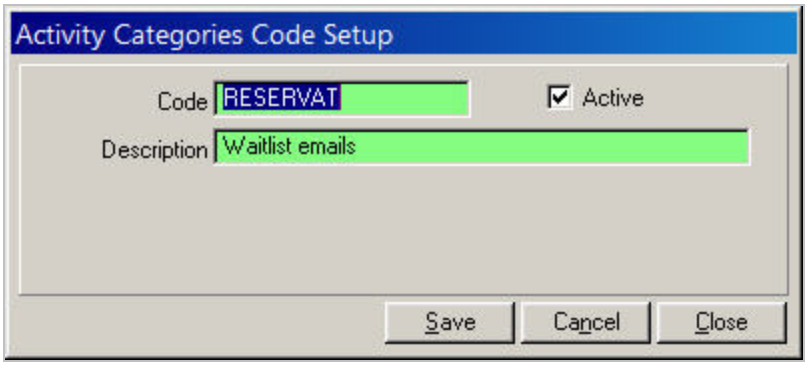
The Activity Categories lists contains codes that can be associated with specific Contact Manager activities. This association is used as a filter in Contact Manager Reports.

To add or edit a list of activity category codes:

1. Navigate to **Lists** > **Contact Manager**. The Setup - Contact Manager Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Activity Categories**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Activity Categories Code Setup form is displayed.



Note: Set up a Waitlist activity category that can be associated with all activities associated with course reservations.

6. Specify a unique **Code**.

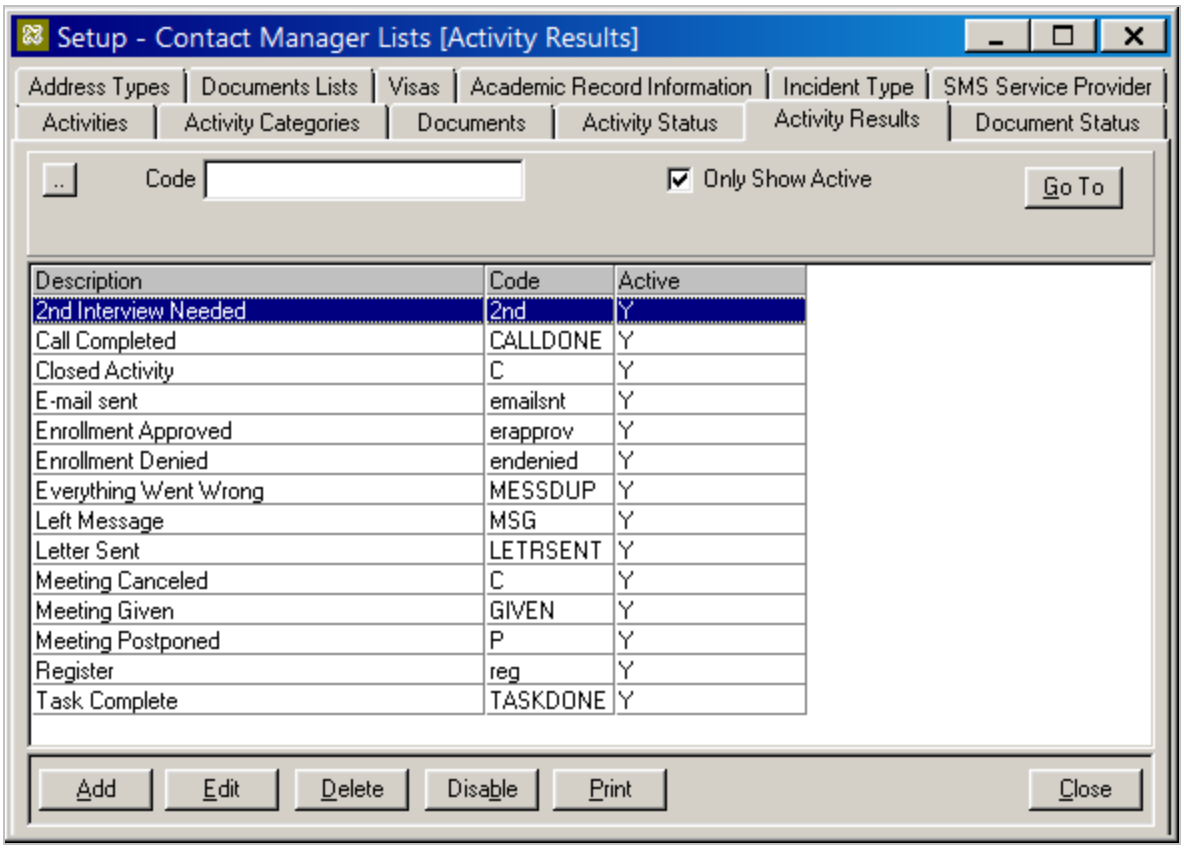
7. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
8. Enter a **Description**.
9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Contact Manager Lists [Activity Results]

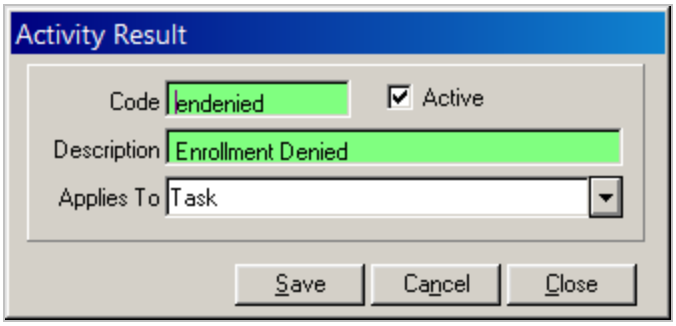
The Activity Results list codes are used to indicate what happens when an activity or task is completed. Part of the result may be a follow-up activity or task.

To add or edit a list of activity results codes:

1. Navigate to **Lists** > **Contact Manager**. The Setup - Contact Manager Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Activity Results**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
6. Click **Add**, or select a record and click **Edit**. The Activity Results code setup form is displayed.



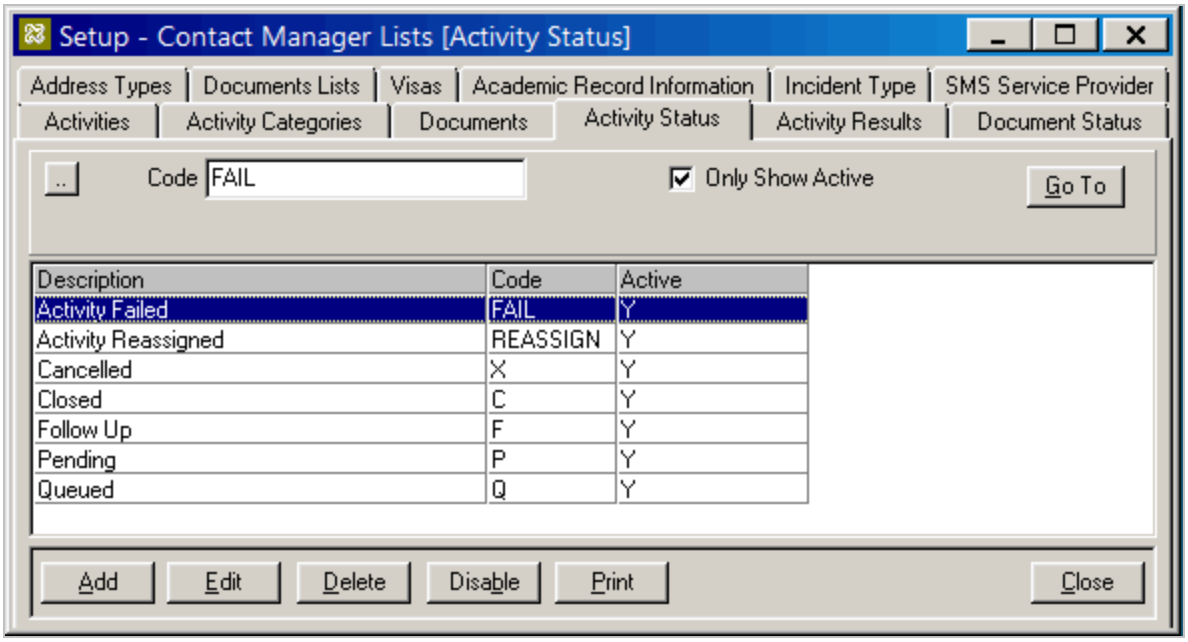
7. Specify a unique **Code**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Enter a **Description**.
10. Select an **Applies To** option. The values on the 'Applies To' list are activities to which the activity result code could apply. Set up a different code for each result that might occur for an activity.
11. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Contact Manager Lists [Activity Status]

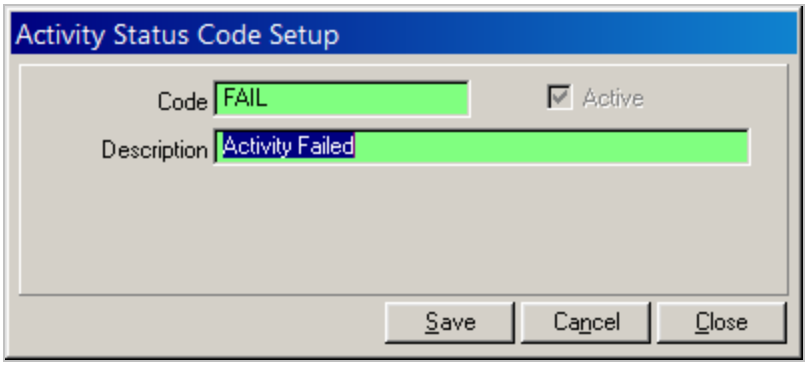
The Activity Status list contains codes that indicate the status of activities assigned to staff members.

To add or edit a list of a activity status codes:

1. Navigate to **Lists** > **Contact Manager**. The Setup - Contact Manager Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Activity Status**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Activity Status Code Setup form is displayed.



6. Specify a unique **Code**.
7. Select or clear the **Active** check box to designate the record as active or inactive, respectively.

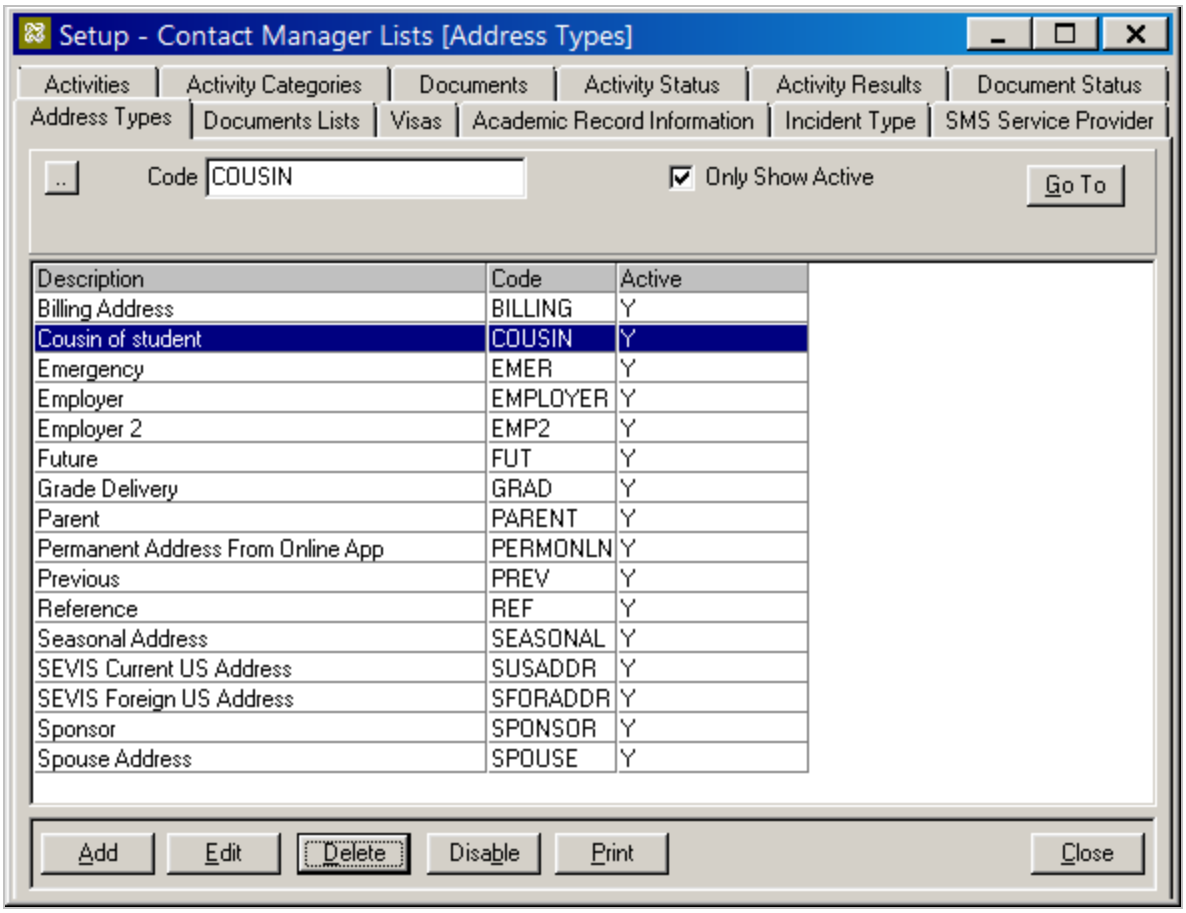
8. Enter a **Description**.
9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Contact Manager Lists [Address Types]

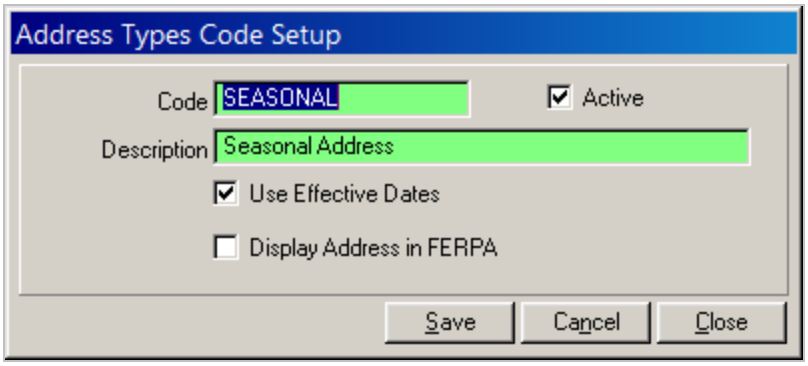
When you record addresses for leads, students, or graduates in CampusNexus Student, you are asked for an address type. The Address Types list is used to define codes for address types used at your institution.

To add or edit a list of address type codes:

1. Navigate to **Lists** > **Contact Manager**. The Setup - Contact Manager Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Address Types**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Address Types Code Setup form is displayed.



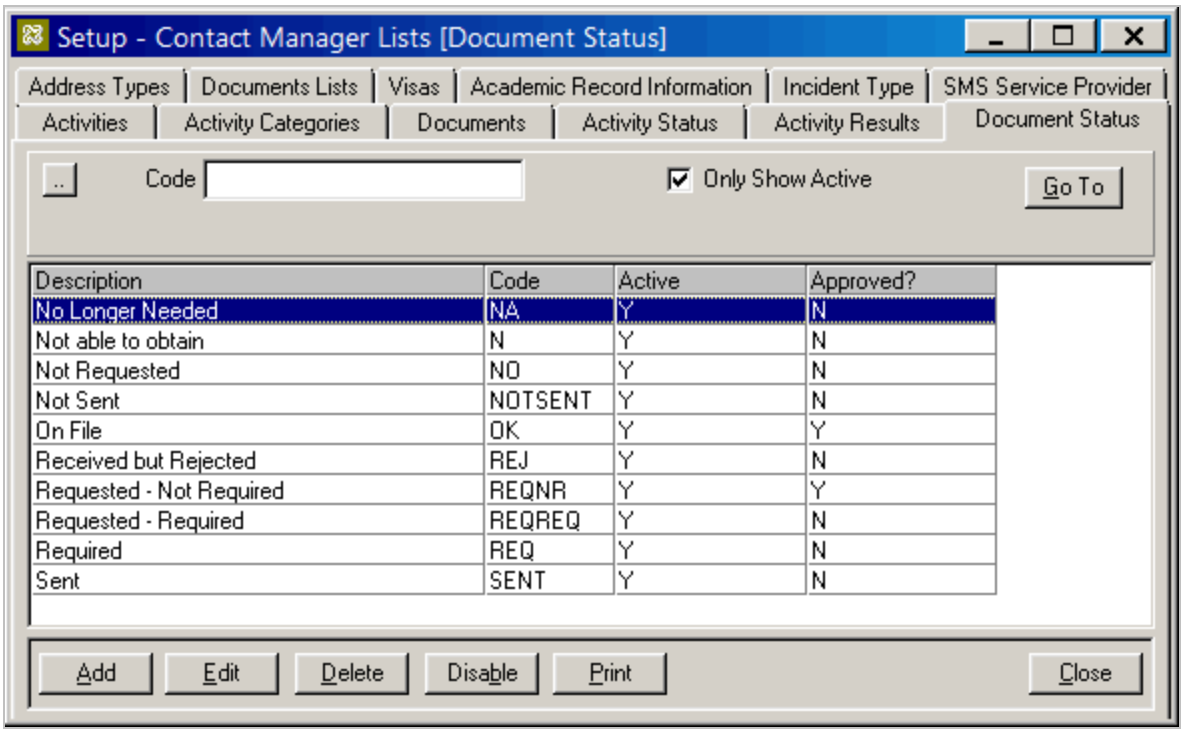
6. Specify a unique **Code**.
7. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
8. Enter a **Description**.
9. Select **Use Effective Dates** if the address type code is associated with a seasonal/temporary address. For instance, if a student would like to receive mail at an address for a certain length of time, select the check box and assign the seasonal/temporary address to this address type. See Addresses to associate this address type with a student's address.
10. Select or clear **Display Address in FERPA** as required.
11. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Contact Manager Lists [Document Status]

The Document Status list contains codes that you can assign to documents requested from leads or students. Assign these codes when you are working with the document tracking list for each student and when updating documents under various modules of the Daily menu. In this case, you are selecting a particular document and monitoring its status for groups of students.

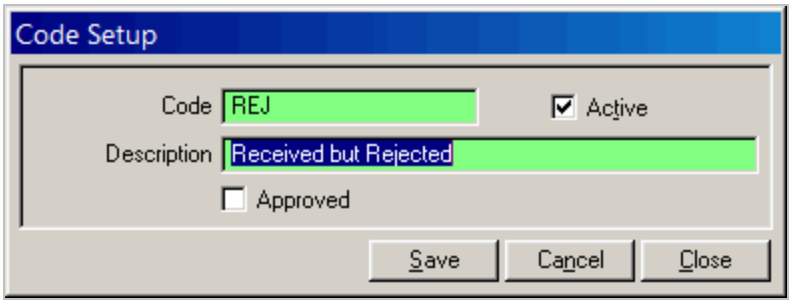
To add or edit a list of document status codes:

1. Navigate to **Lists** > **Contact Manager**. The Setup - Contact Manager Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Document Status**.



Note: *Sent* and *Not Sent* are system-required codes. They are used with outgoing documents.

3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Document Status Code Setup form is displayed.



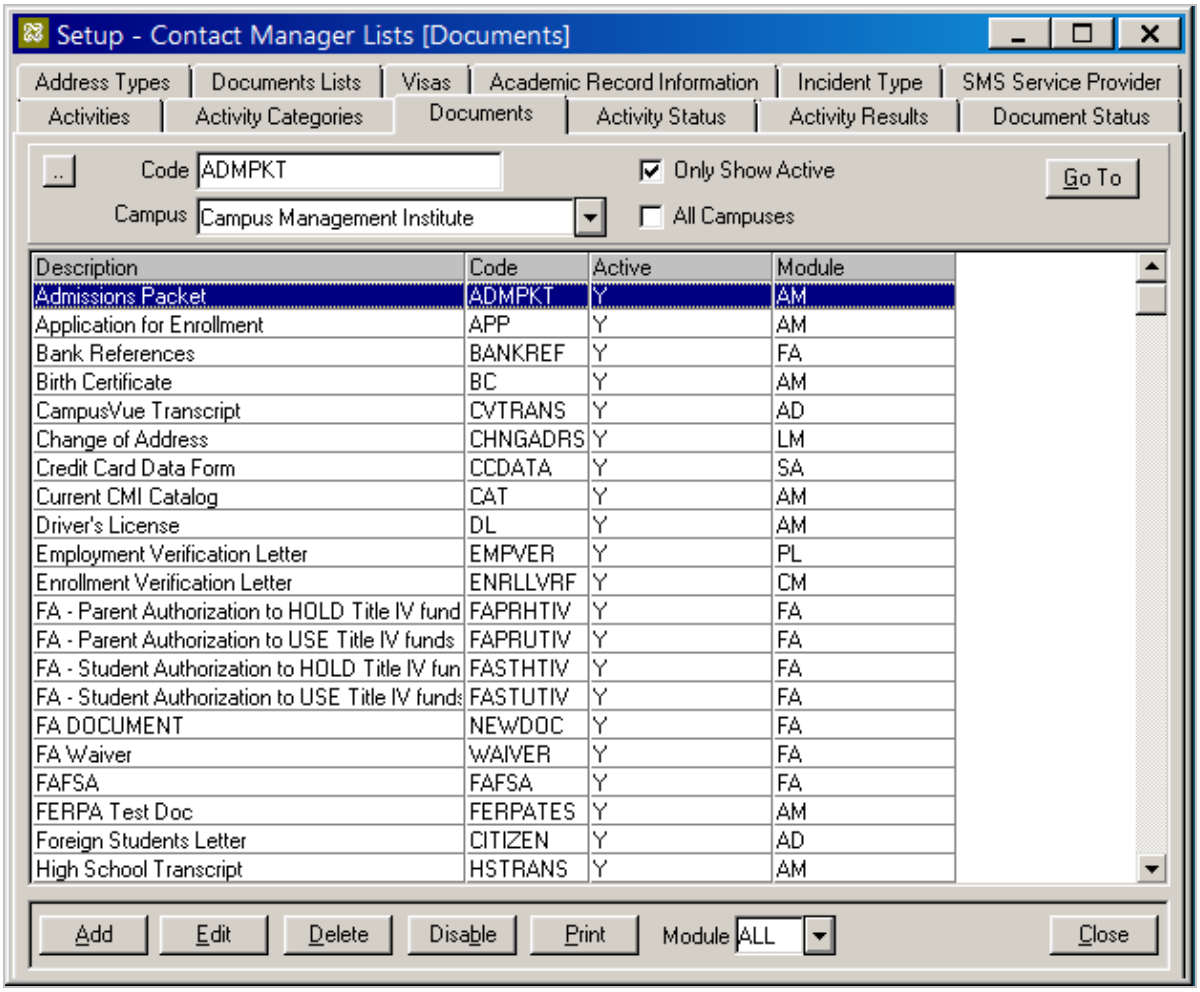
6. Specify a unique **Code**.
7. Enter a **Description**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Select the **Approved** check box to indicate that the document is in an approved status when it is associated with the Code and Description entered above, otherwise clear the check box.
10. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Contact Manager Lists [Documents]

The Documents list contains codes for documents that your institution requests from leads or students or sends to them, for example, a driver's license, high school transcript, or application form. The documents can be related to campus groups, CampusNexus Student modules, academic programs, and sponsoring agencies. The documents are classified by types such as receive/incoming, send and receive, or send out.

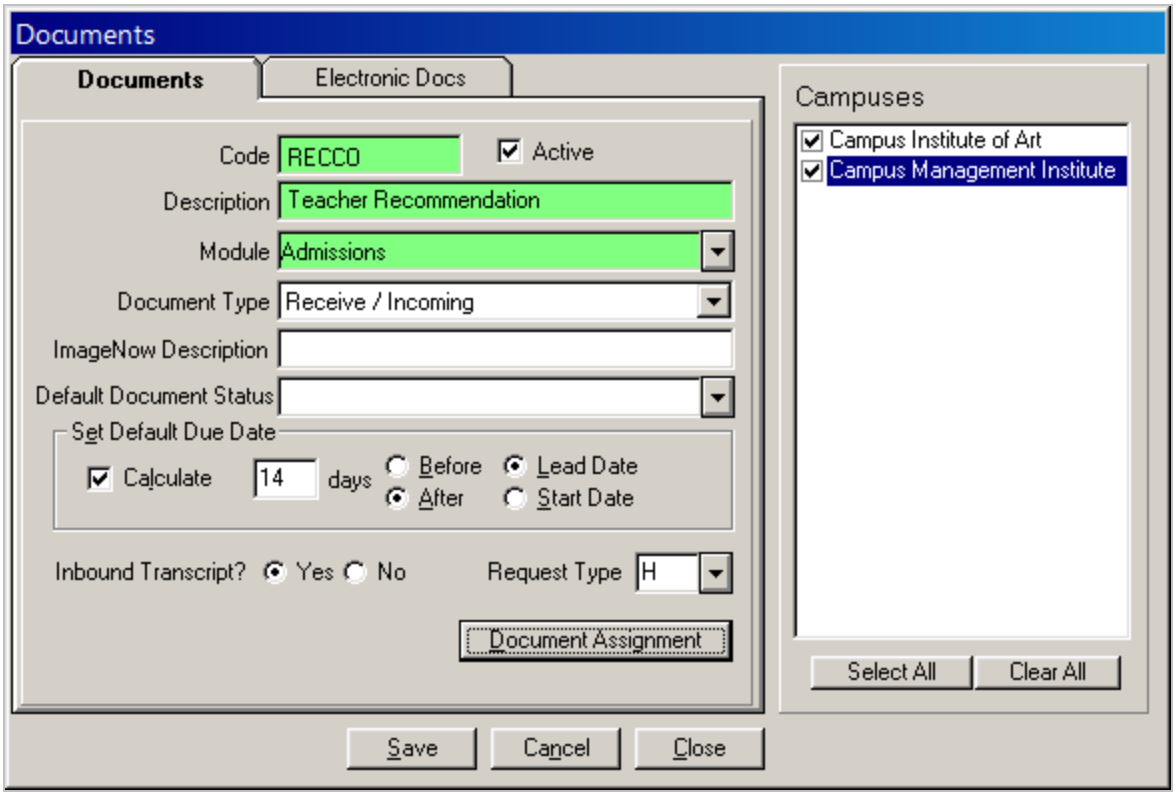
To add or edit a list of document codes:

1. Navigate to **Lists** > **Contact Manager**. The Setup - Contact Manager Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Documents**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.

6. Select a **Module** (at the bottom of the form) to filter the list by module.
7. Click **Add**, or select a record and click **Edit**. The Documents form is displayed.



5. Specify a unique **Code**.
6. Enter a **Description**.
7. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
8. Select one or more **Campuses**.
9. Select a CampusNexus Student **Module** that uses the document.
10. Select the **Document Type**. The options are:

    - Receive/Incoming
    - Send Out
    - Send and Return
    - FERPA

    The 'Send Out' and 'Send and Return' document types are available as attachments to letters.

11. The **ImageNow Description** field is displayed only if the selected campuses are set up for ImageNow. The ImageNow application is used to scan, file, display, and send stored documents.

    Enter a description of the document. Your description must match the ImageNow document description exactly. Ask your system administrator for a list of ImageNow document names.

12. Select a **Default Document Status** for your document. This is an optional field for new documents. You can define the default document status that is assigned when a document is triggered. This ability to assign a different default

status to documents allows you to refine your institution's internal work flow as it pertains to student documents. If no default status is selected, document triggers use the status **Requested - Required**.

13. In the **Set Default Due Date** section, selected or clear **Calculate** as required.

    - If you choose to use the calculate option, enter the number of **days**.
    - Select **Before** or **After**.
    - Select **Lead Date** or **Start Date**.

    These values are used to determine the due date when the documents are automatically added to the student document list. These fields are NOT used when a user manually adds documents to the students document folder. They are also used when selecting "fulfillment" documents for a contact manager item that has attached documents.

    Note: When the document is set up on the Program Version (as opposed to the Program), the Due Date is generated based on the Expected Start Date from the Enrollment wizard (rather than from the Student Master).

14. In the **Inbound Transcript?** section, select **Yes** if this is a document coming from another school.

15. The **Request Type** field is enabled if you selected Yes for Inbound Transcript? Select **C** for College, **H** for High School to indicate the source of the document.

16. The **Placement Specific** check box is displayed if the selected Module is Career Services. If this check box is selected, multiple documents with this code can be added to the student's document list for each enrollment record.

17. The **Is Award year Specific?** check box is displayed if the selected Module is Financial Aid. Select this check box to indicate that the document is award-year specific.

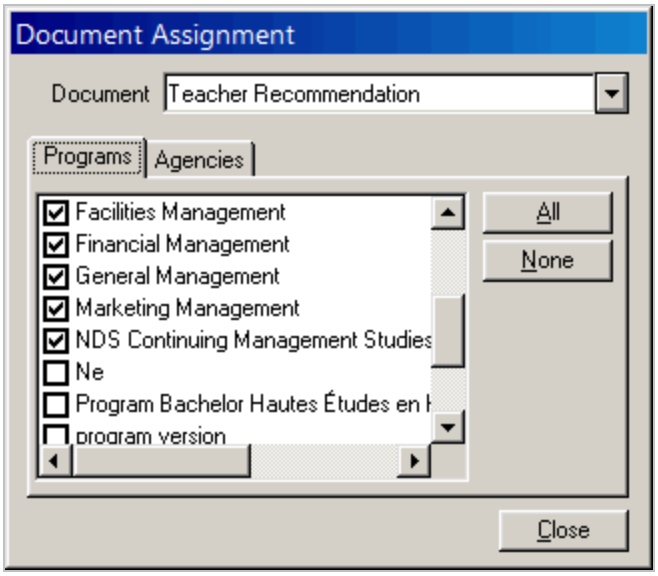
18. The **Registration Prerequisite Document** check box is displayed if the Module is Academic Records. This check box allows the document to be configured as a course or course section prerequisite. Additionally, the check box enables the Permit Details tab when adding a Registration Prerequisite Document to a student's Documents folder. Within the Permit Details tab, you can specify the course for which the document should allow registration.

    - When Registration Prerequisite Document check box selected, Inbound Transcript controls are disabled and set to No.
    - When Inbound Transcript is set to Yes, the Permit Check check box is disabled and cleared.

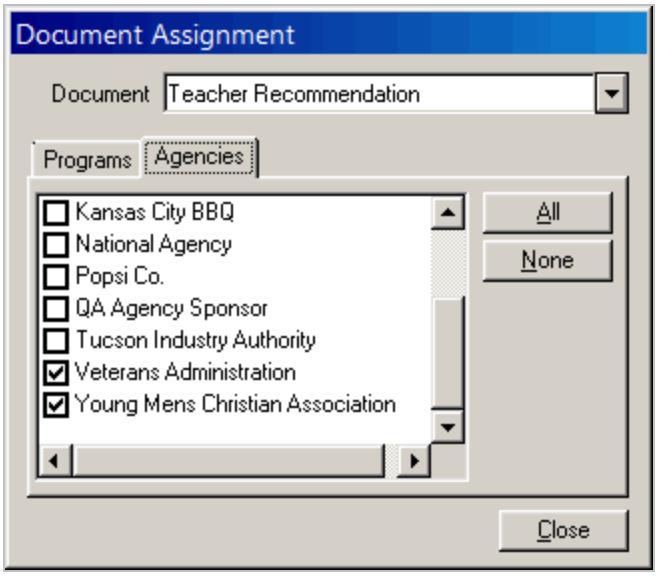
18. Click the **Document Assignment** button to assign the document to programs and/or Sponsoring Agencies. The Document Assignment form is displayed.

19. Verify that the correct document is displayed in the **Document** field.

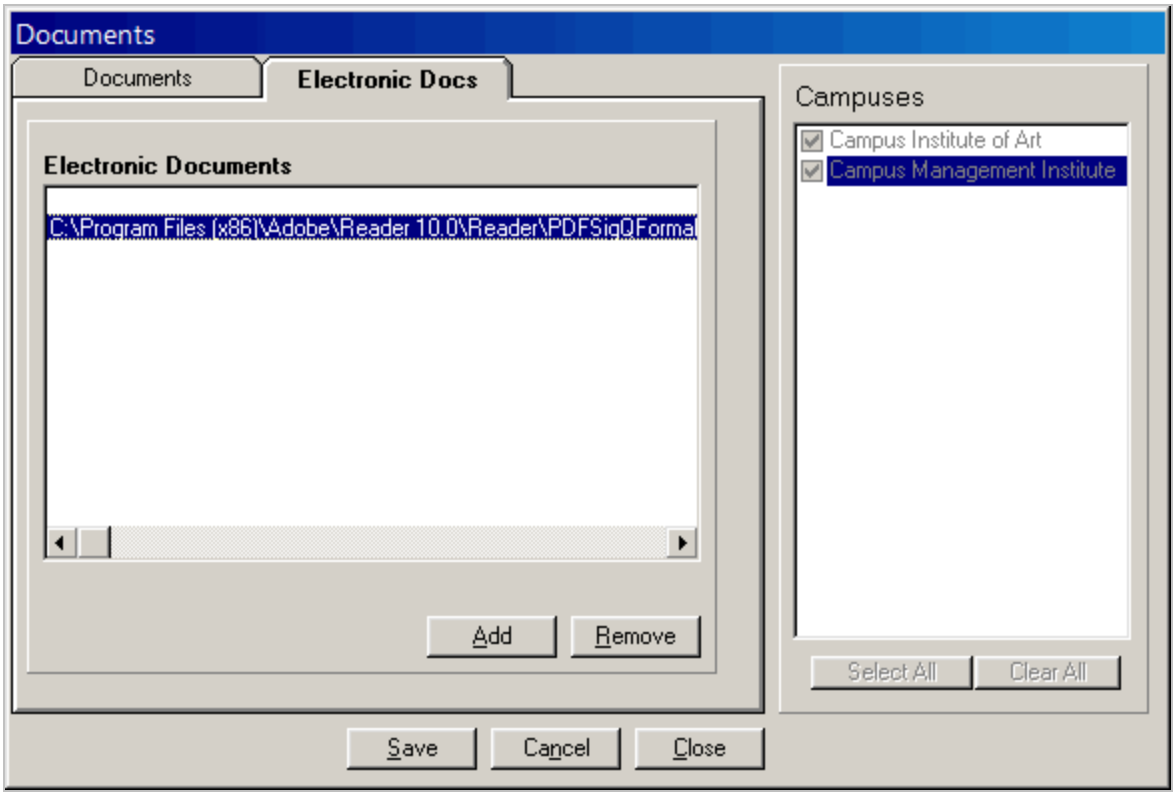
20. In the **Programs** tab, select the programs for which the document is required.



21. In the **Agencies** tab, select agencies for which the document is required.



22. Click **Close** to close the form.
23. The **Electronic Docs** tab is enabled if you select *Send and Return* or *Send Out* in the Documents tab. This tab enables you to add and remove electronic documents that have been scanned into the institution's system.



24. Click **Add**. The Open form is displayed. Browse the directories and select the file that you want to include in the Document List. Only one electronic document can be added in the Student Document folder.

    Note: Ensure that the documents are stored in a folder which is accessible by the COM server. The Windows Service retrieves documents from the path defined in the Downloadable Documents Path and cannot retrieve the document if the path does not refer to a local path or a shared public folder. For assistance contact your system administrator.

25. Select a file and click **Remove** to delete a file from the list.

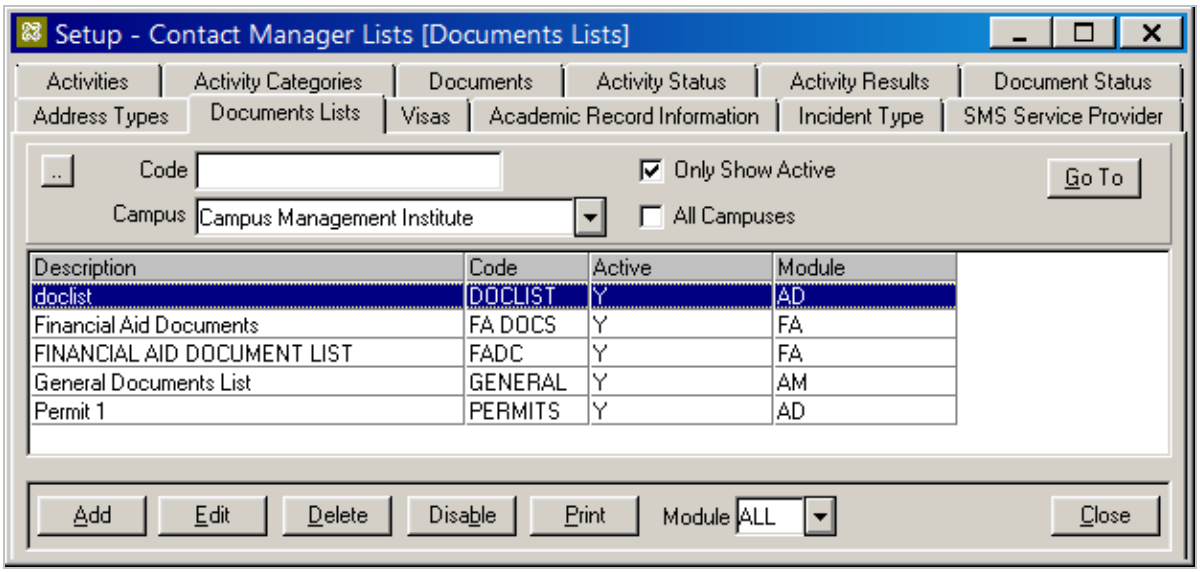
26. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Contact Manager Lists [Document Lists]

Document Lists define sets of documents that can be assigned to a student based on various parameters. You can create Document Lists that are specific to campus groups and assign documents to students based on school-defined criteria.

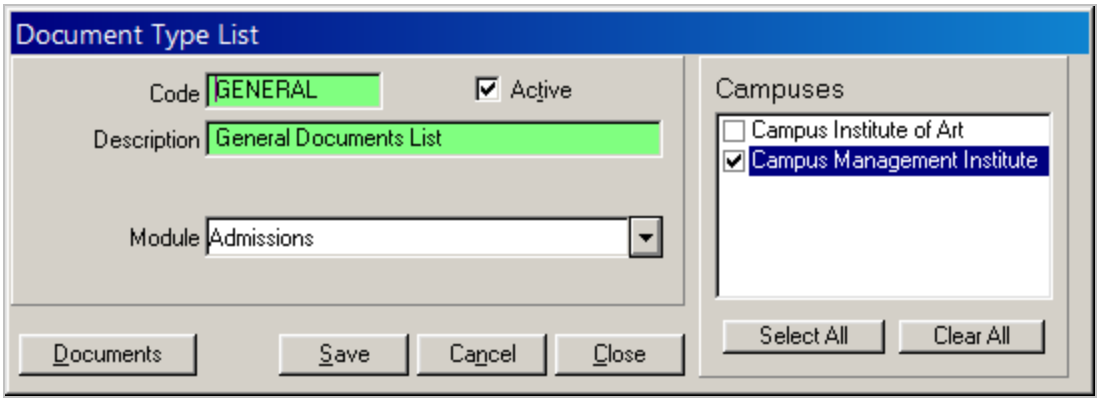
To add or edit a list of document list codes:

1. Navigate to **Lists** > **Contact Manager**. The Setup - Contact Manager Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Document Lists**.



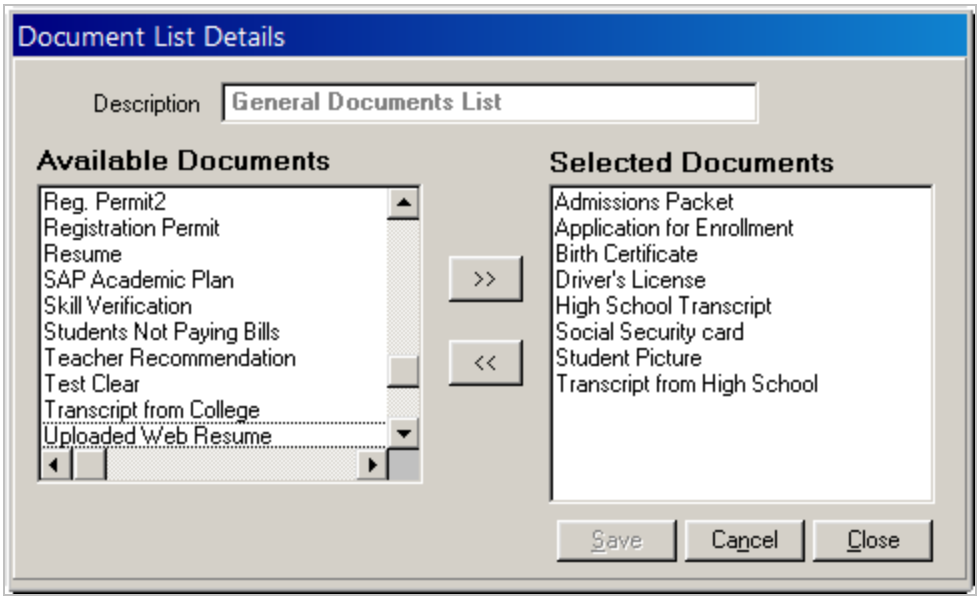
3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
6. Click **Add**, or select a record and click **Edit**. The Document Type List form is displayed.

   Note: The Documents button is disabled if this form is activated in Add mode. The Documents button is enabled after you save the Document List record, or if this form is activated in Edit mode.



7. Specify a unique **Code**.
8. Enter a **Description**.
9. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
10. Select one or more **Campuses**. The list of campuses that is displayed in the Campuses field include only those to which you are authorized to assign document lists.
11. Select a CampusNexus Student **Module** to which the Document List applies, for example Financial Aid, Student Accounts, Housing, and so on.

    The Module list displays the same values as the Module list on the Documents form (frmCmDocType).
12. Click **Save**. The CM Document Type List table is updated.
13. Click **Documents** to select documents for the Document List. The Document List Details form is displayed.



14. To add a document to the list, select it in the **Available Documents** area and click >>.
15. To remove a document from the list, select it in the **Selected Documents** area and click <<.

16. Click **Save**. All documents in the Selected Documents column are updated to the CM Document Type List Detail table.

    CampusNexus Student first deletes any existing rows in the table for the document list being edited or added. A row for each selected document is then inserted into the table.

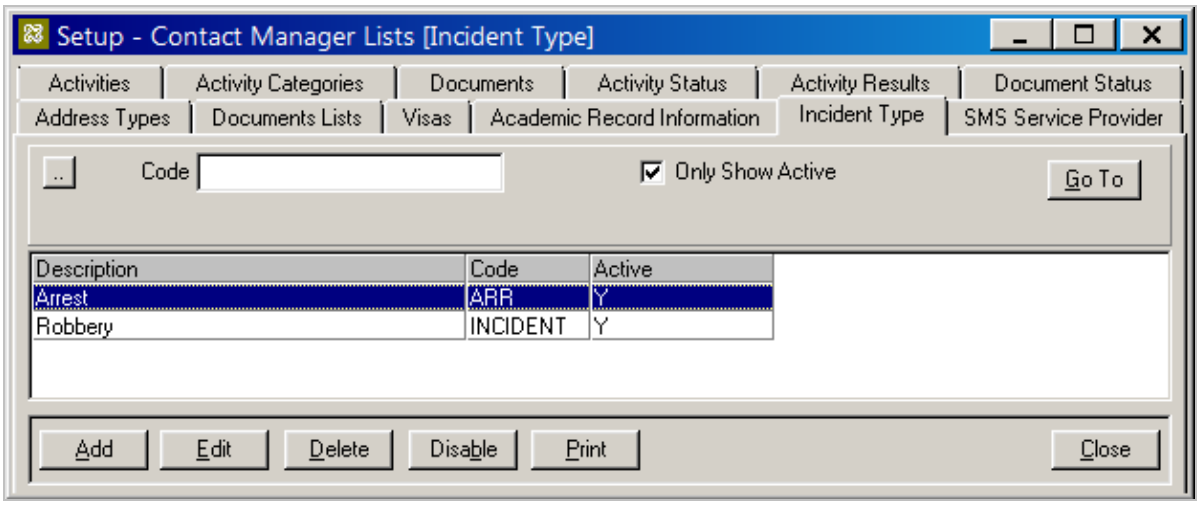
17. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Contact Manager Lists [Incident Type]

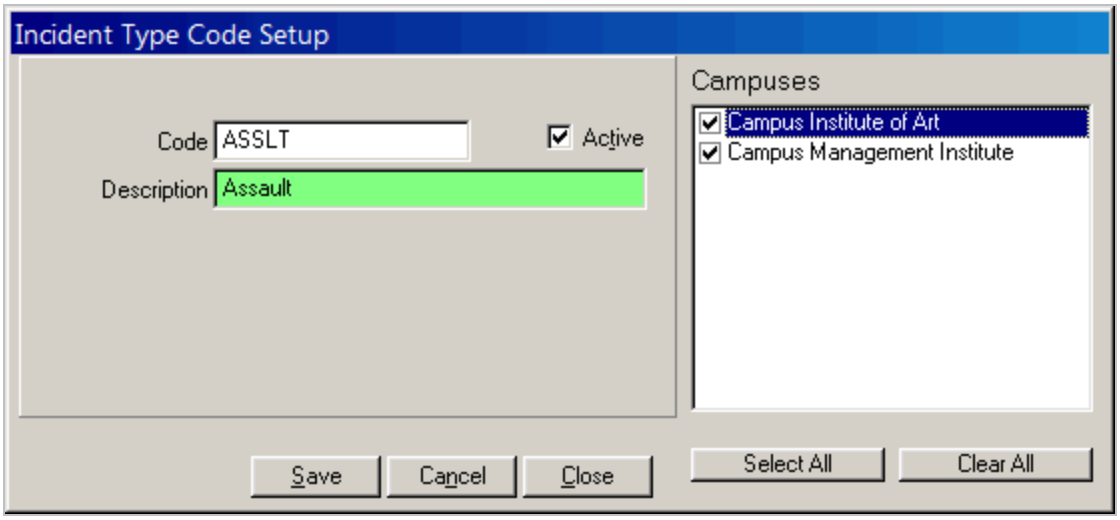
The Incident Type list defines codes for student conduct violations that occur on a campus. Users can track student conduct violations that need to be included in the Jeanne Clery Campus Crime Report. This report is a federally required statistical reporting of all student conduct violations that occur for the population of students on a campus.

To add or edit a list of incident type codes:

1. Navigate to **Lists** > **Contact Manager**. The Setup - Contact Manager Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Incident Type**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Incident Type Code Setup form is displayed.



6. Specify a unique **Code**.

7. Enter a **Description**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Select one or more **Campuses**. The list of campuses that is displayed in the Campuses field include only those to which you are authorized to assign incident types.
10. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

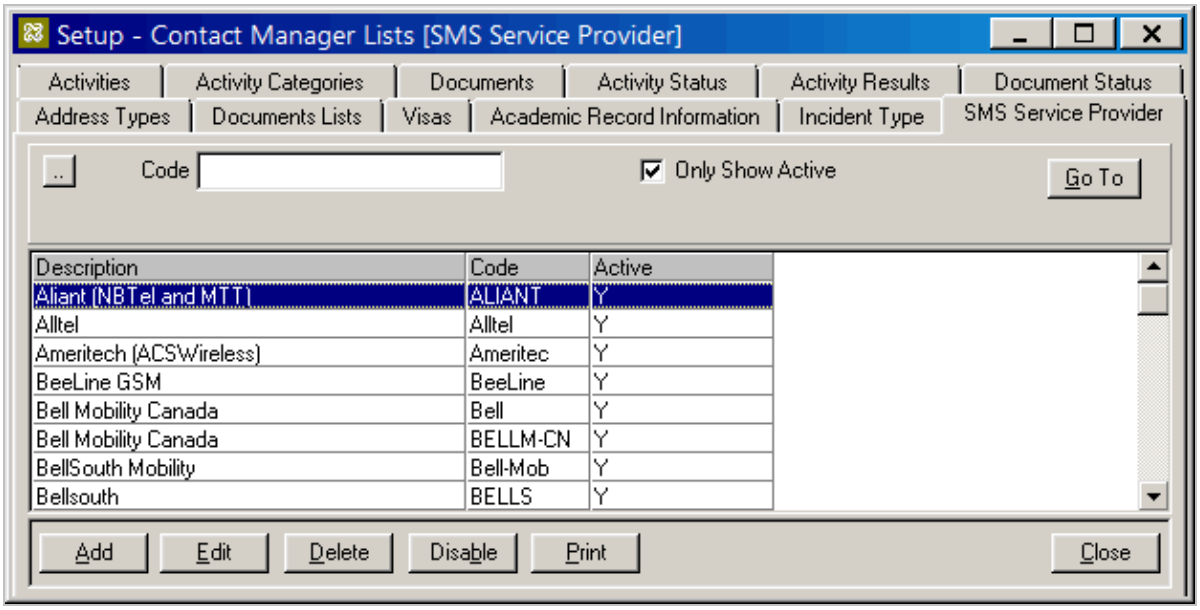
Setup - Contact Manager Lists [SMS Service Providers]

Students can subscribe to Short Message Service (SMS) communications from their campus on their mobile phones, tablets, desktop computers, and some fixed phones.

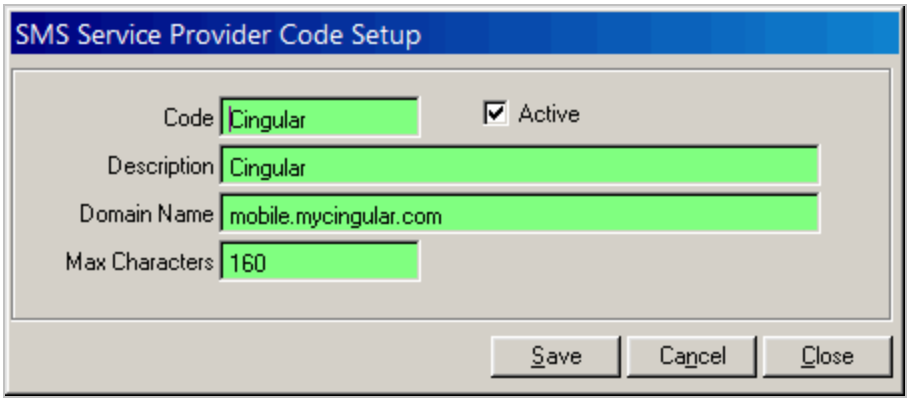
Institutions can configure the settings for the SMS service providers for each campus from the SMS Service Provider tab on the Campus Information form.

To add or edit a list of SMS service provider codes:

1. Navigate to **Lists** > **Contact Manager**. The Setup - Contact Manager Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **SMS Service Provider**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
6. Click **Add**, or select a record and click **Edit**. The SMS Service Provider Code Setup form is displayed.



7. Specify a unique **Code**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Enter a **Description**.
10. In the **Domain Name** field, specify a location for the service provider (75 characters maximum).
11. In the **Max Characters** field, specify the maximum number of characters (3 digits maximum) that can be used in a text message before exceeding the service provider's limit.
12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

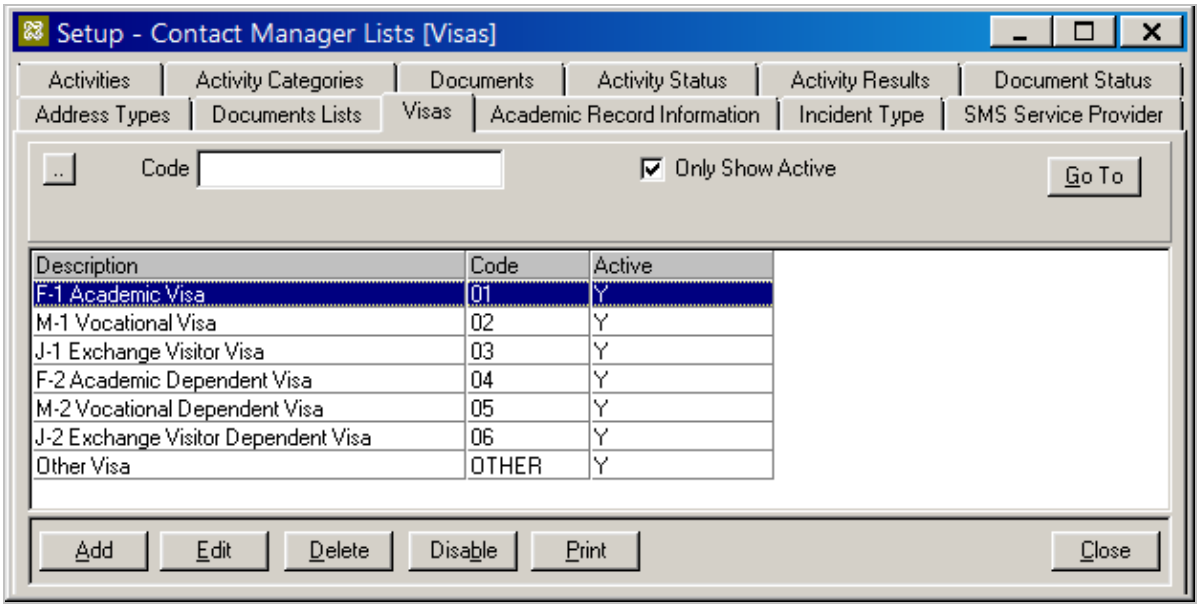
Setup - Contact Manager Lists [Visas]

The Visas list contains codes for SEVIS processing and transmission to the SEVIS system. Codes 01 through 06 are system codes. They cannot be deleted. The "Other Visa" code was added as an example of a school-defined code. Student records with this type of visa (or any other school-defined visa code) are not transmitted to SEVIS.

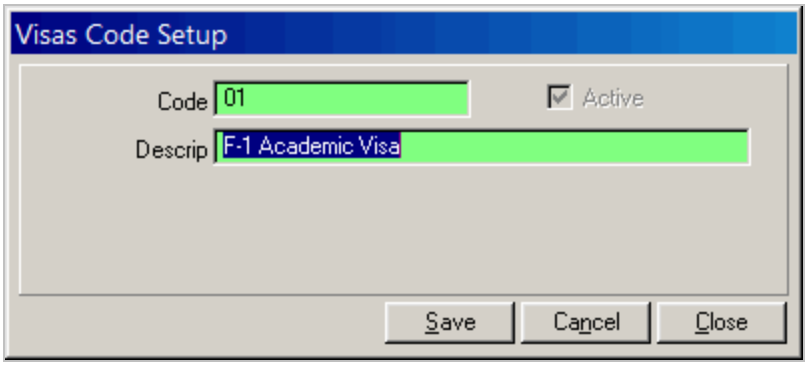
Refer to SEVIS Overview for more on the SEVIS features in CampusNexus Student.

To add or edit a Visa code:

1. Navigate to **Lists** > **Contact Manager**. The Setup - Contact Manager Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Visas**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Visas Code Setup form is displayed.



6. Specify a unique **Code**.

Codes 01 through 06 are system codes. You can edit the description of the system codes if necessary. In the illustration, the description was edited by adding the words "Academic Visa".

7. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
8. Enter a **Description**.
9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Integration of Contact Manager Activities

As of Release 14.0, when CampusNexus Student is integrated with a CRM system, you can integrate selected activities on a per campus basis. When Release 14.0 is installed, by default, all Contact Manager activities are non-integrated. Integrating only selected activities enhances performance by reducing the number of messages sent from CampusNexus Student through Connector to the CRM and reduces the risk that sensitive information is passed to the CRM system.

Previously, when CampusNexus Student was integrated with a CRM system, all Contact Manager activities were integrated by default. There was no option to configure which activities to share with the CRM system. As a result, numerous records that were not relevant for the CRM system were migrated to and archived in the CRM system.

Integrating Activities with a CRM System

When CampusNexus Student is integrated with a CRM system, you can select Contact Manager activities to be integrated and to specify the effective date of the integration using the following procedures.

Prerequisite: CRM integration must be enabled at the CampusNexus Student system level.

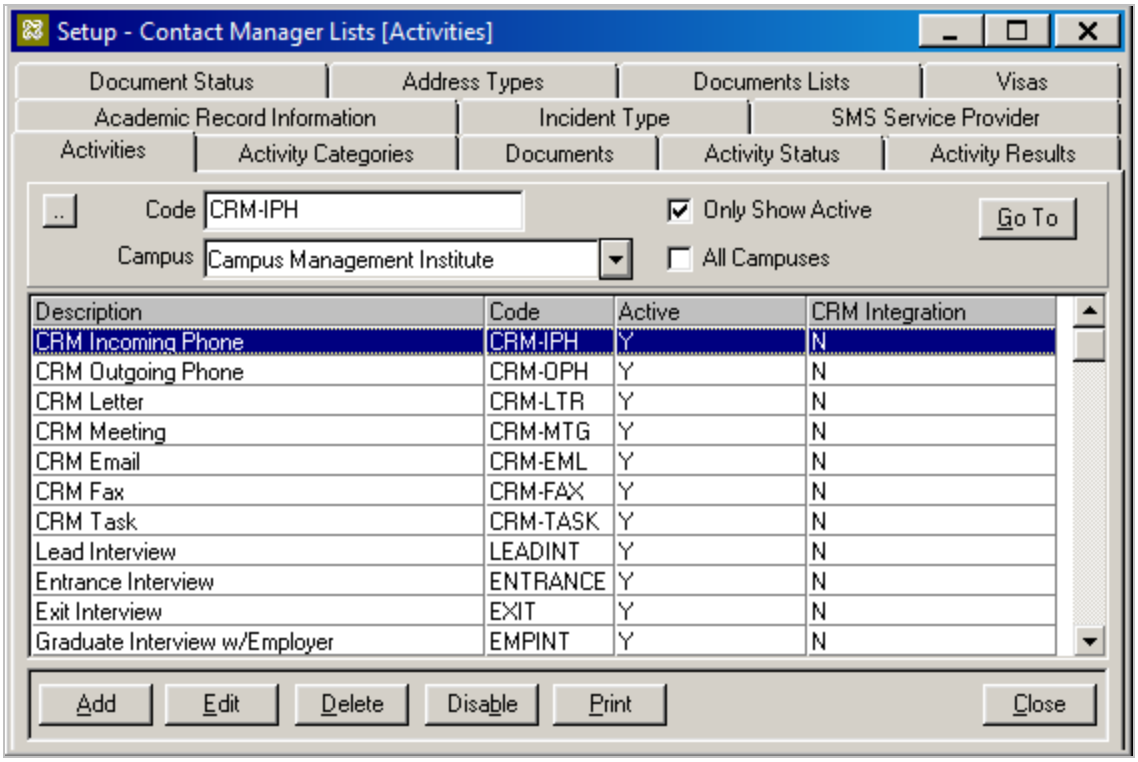
To verify that the prerequisite is met:

1. Navigate to **Setup** > **System**. The System Settings form is displayed.
2. Click the **Integration** tab. The Integration tab of the System Settings form is displayed.
3. Verify that the **CRM Integration** check box is selected.

To integrate selected Contact Manager activities with a CRM system:

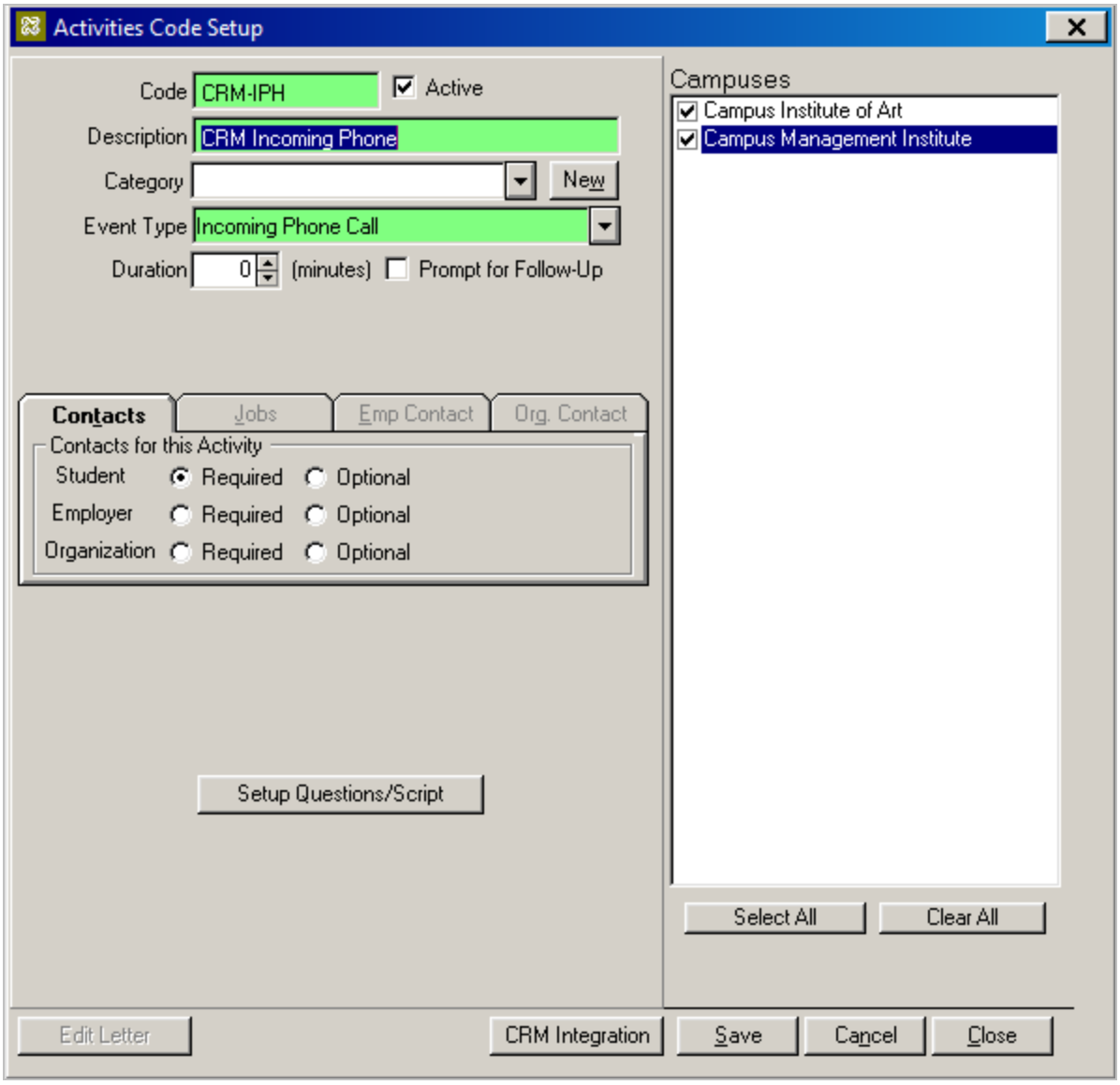
1. Navigate to **Lists** > **Contact Manager** > **Activities**(tab). The Setup - Contact Manager Lists (Activities) form is displayed.

   Note: When CRM Integration is enabled at the system level, the CRM Integration column is displayed in the Activities grid. In this column, integrated activities are marked with a Y; non-integrated activities are marked with an N.

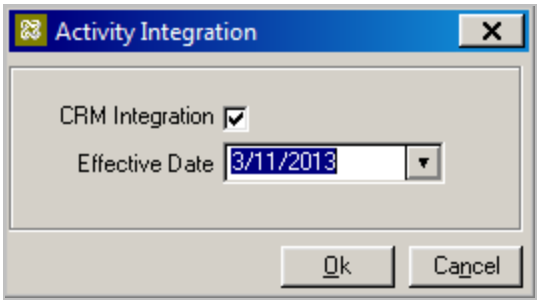


2. Select an **Activity** and click **Edit**. The Activities Code Setup form is displayed.

   Note: Only when CRM Integration is enabled at the system level, the CRM Integration button is displayed on the Activities Code Setup form.



3. On the Activities Code Setup form, click **CRM Integration**. The Activity Integration form is displayed.



4. Select the **CRM Integration** check box and enter an **Effective Date**. Activities that occur on or after the Effective Date are integrated.

Note: If the Effective Date is changed to a later date and the activities have previously been integrated for some students, then the activities will remain integrated for those students, but won't be integrated for future students.

Examples:

If the Effective Date on the Activity Integration form is today's date, 3/15/2013, and the activity gets created using this template on 3/15/2013 and later, then the activity will be integrated. If the activity gets created using this template on 3/14/2013, then the activity will NOT be integrated.

If you change the Effective Date from 3/15/13 to 3/12/13 and if this activity is already integrated, then there will be no impact on the integrated activity. In other words, once the activity is integrated it remains integrated.

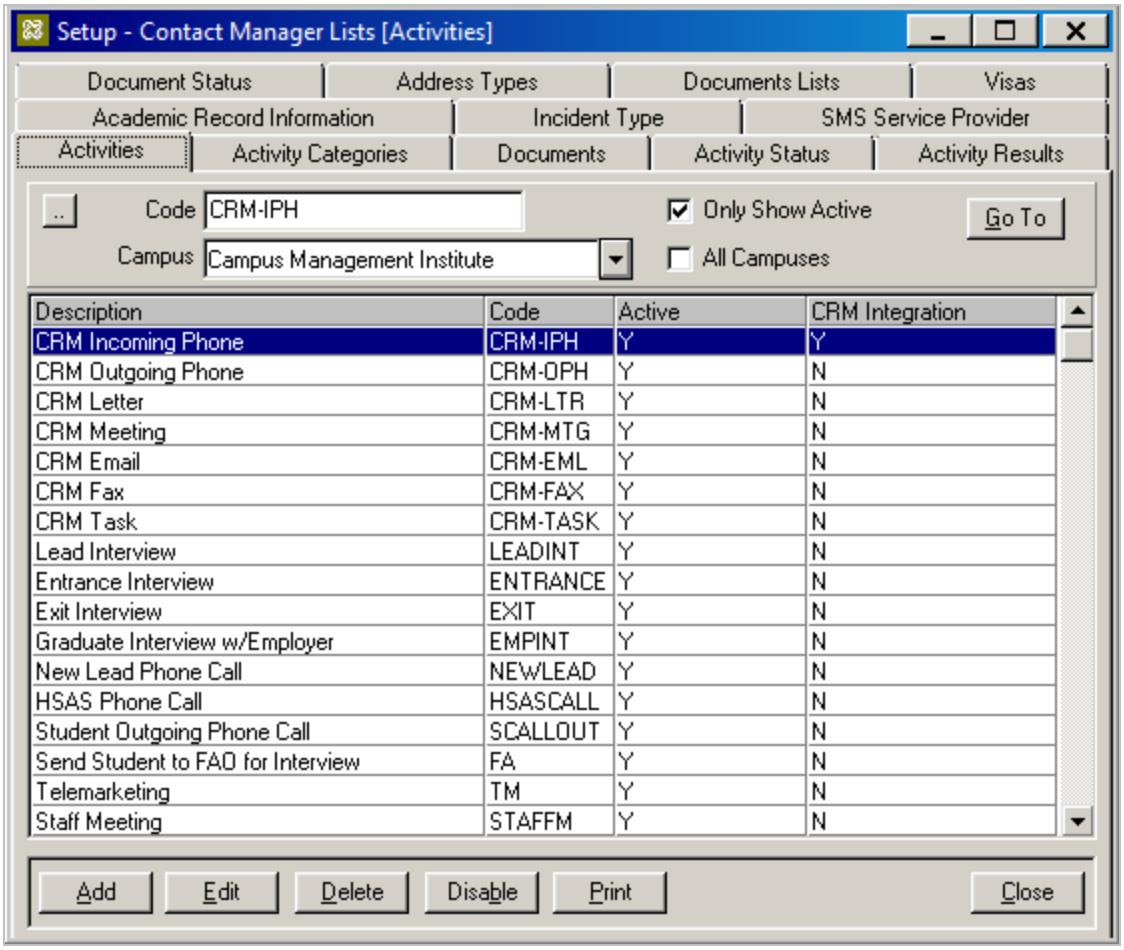
5. Click **Ok**. The Activity Integration form closes.
6. On the Activities Code Setup form, click **Save** and **Close** .

   The integrated activity is now marked with a Y in the CRM Integration column on the Setup - Contact Manager Lists (Activities) form.

To remove the integration of Contact Manager activities with a CRM system:

1. Navigate to **Lists** > **Contact Manager** > **Activities** (tab). The Setup - Contact Manager Lists (Activities) form is displayed.

   Note: Integrated activities are marked with a Y, non-integrated activities are marked with an N in the CRM Integration column.



2. Select an integrated **Activity** and click **Edit**. The Activities Code Setup form is displayed.
3. Clear the **CRM Integration** check box.
4. Click **Ok**. The Activity Integration form closes.
5. On the Activities Code Setup form, click **Save** and **Close** .

   The integrated activity is now marked with a N in the CRM Integration column on the Setup - Contact Manager Lists (Activities) form.

Producing a Report on Integrated Activities

When CampusNexus Student is integrated with a CRM system, specific Contact Manager activities may be configured to be integrated, while other activities are not integrated. You can produce a report that displays the integration status of activities using the following procedure.

Prerequisite: CRM integration must be enabled at the CampusNexus Student system level.

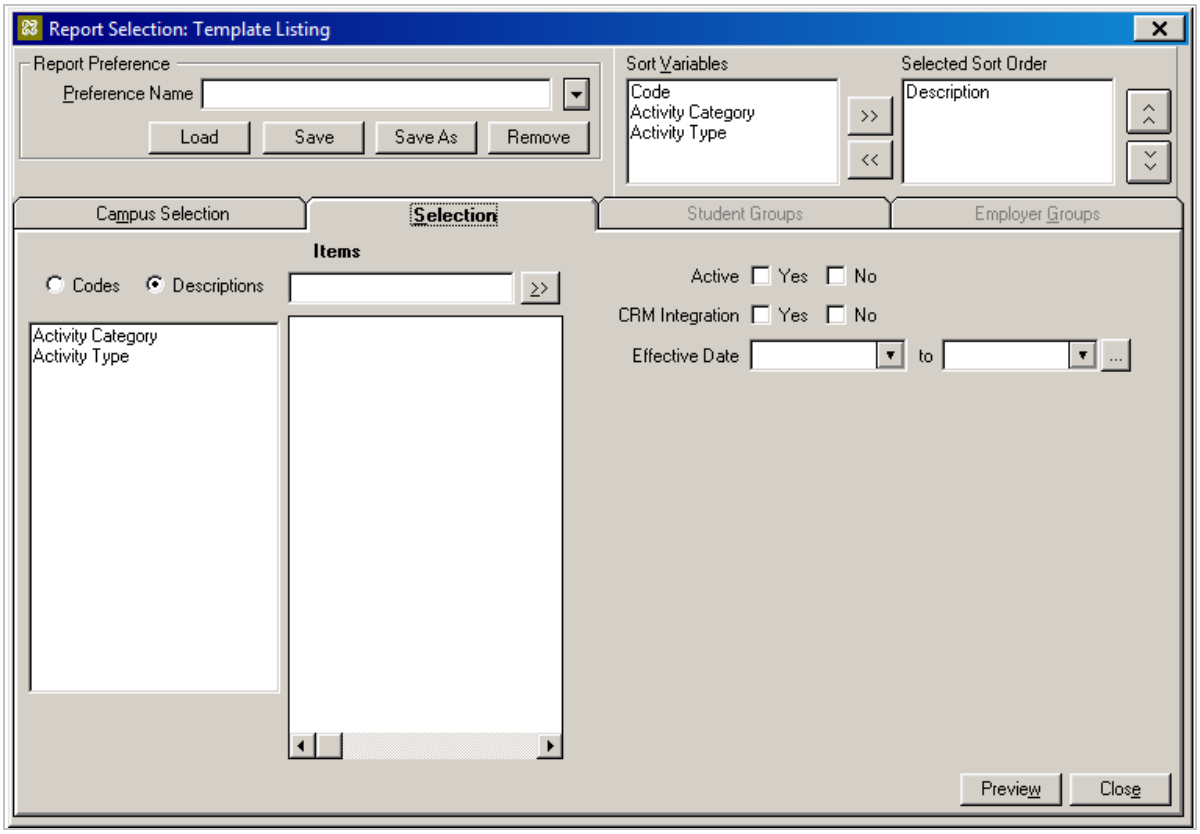
To verify that the prerequisite is met:

1. Navigate to **Setup** > **System**. The System Settings form is displayed.
2. Click the **Integration** tab. The Integration tab of the System Settings form is displayed.
3. Verify that the **CRM Integration** check box is selected.

To produce a report on Contact Manager activities:

1. Navigate to **Lists** > **Contact Manager** > **Activities** (tab). The Setup - Contact Manager Lists (Activities) form is displayed.
2. On the Setup - Contact Manager Lists (Activities) form, click **Print**. The Report Selection - Template Listing form is displayed.
3. On the Campus Selection tab, select appropriate options and click **Continue**.
4. Select appropriate options on the Selection tab.

   Note: The selection options **Active: Yes/No**, **CRM Integration: Yes/No**, and **Effective Date** are independent of each other. For example, you can select an Effective Date without selecting Active or CRM Integration and vice versa.



5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   Details on the report include:

   - Activity Code
   - Description
   - Effective Date (indicates CRM Integration)
   - Duration
   - Default Status
   - Event Type
   - Activity Category
   - Required Follow Up
   - Active

   The following example uses the selection criteria Active = Yes and CRM Integration = Yes.

   Integrated activities are those for which a date is displayed in the Effective Date column on the report.

Activity Types

rpt_cm Activity Integrated.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- Active Is Yes
- CRM Integration Is Yes

Sorted by: Description

3/11/2013
12:55:30 PM

Code	Description	Effective Date	Duration	Default Status	Event Type	Activity Category	Required Follow Up	Active
.TEST	.Test Letter		0	Unread	Letter		No	Yes
123	123		0	Unread	Letter		No	Yes
JACKIE	22591		0	Unread	E-Mail Student		No	Yes
ASTUDALR	A Student Alert		0	Unread	Student Alert		No	Yes
ADM1R2I	ADM - 1st Rescheduled 2nd Interview		0	Unread	Meeting		No	Yes
ADM1RI	ADM - 1st Rescheduled Interview		0	Unread	Meeting		No	Yes
ADM1RINS	ADM - 1st Rescheduled Interview No Show		0	Unread	Meeting		No	Yes
ADM2D2	ADM - 2 Day 2nd Interview Follow Up Call		0	Unread	Outgoing Phone Call		No	Yes
ADM2I	ADM - 2nd Interview		0	Unread	Meeting		No	Yes
ADM2INSF	ADM - 2nd Interview No Show Follow Up Call		0	Unread	Outgoing Phone Call		No	Yes
ADM2R2I	ADM - 2nd Rescheduled 2nd Interview		0	Unread	Meeting		No	Yes
ADM2RI	ADM - 2nd Rescheduled 2nd Interview		0	Unread	Meeting		No	Yes
AM-LAB	Admissions Labels		0	Unread	Letter		No	Yes
AMXYL	AM New lead label		0	Unread	Letter	Sales Activities	No	Yes
AM-NL	AM-New Lead Label		0	Unread	Letter		No	Yes
12341234	asdfasdf		0	Unread	E-Mail Student		No	Yes
ASAPFAIL	Automated SAP Run Failure		0	Unread	E-Mail Staff		No	Yes
ASAPSUCC	Automated SAP Run Success		0	Unread	E-Mail Staff		No	Yes
BILL EMA	Billing Emails		0	Unread	Letter	Parent Emails	No	Yes
SCRIPT	Call Script		0	Unread	Meeting		No	Yes
CHAGSTST	Change of Status Letter		0	Unread	Letter		Yes	Yes
CODE	code		0	Unread	Other Task		No	Yes
~MSG	Contact Manager Message		0	Unread	Message		No	No
CRM-EML	CRM Email	3/11/2013	0	Unread	E-Mail Student		No	Yes
CRM-FAX	CRM Fax	3/11/2013	0	Unread	Other Task		No	Yes
CRM-IPH	CRM Incoming Phone	3/11/2013	0	Unread	Incoming Phone Call		No	Yes
CRM-LTR	CRM Letter	3/11/2013	0	Unread	Letter		No	Yes
CRM-MTG	CRM Meeting	3/11/2013	0	Unread	Meeting		No	Yes
CRM-OPH	CRM Outgoing Phone	3/11/2013	0	Unread	Outgoing Phone Call		No	Yes
CRM-TASK	CRM Task	3/11/2013	0	Unread	Other Task		No	Yes
E	E		0	Unread	Letter		Yes	Yes
EMSTAFF	E-Mail Staff		0	Unread	E-Mail Staff		No	Yes
EMAILSTU	E-mail Student		0	Unread	E-Mail Student		No	Yes

CRM integrated activities

Campus Management

Page 1 of 3

Lists > Admissions

When you navigate to Lists > Admissions, the Setup - Admissions Lists form is displayed. Add, edit, delete, disable, and print Admissions lists from the following tabs:

- Agency Type
- Applicant Type
- Application
- Citizenship
- Colleges
- Contact Type
- Counties
- Countries
- Education Level
- Ethnic Codes
- Exam Location
- Extra-Curricular
- Gender
- Grade Level
- Lead Categories
- Lead Sources
- Lead Type
- Lead Vendors
- Marital Status
- Nationality
- Rep Type
- States
- Suffix
- Tests
- Titles
- Transfer Status
- Transfer Type
- ZIP Code Distance Zone

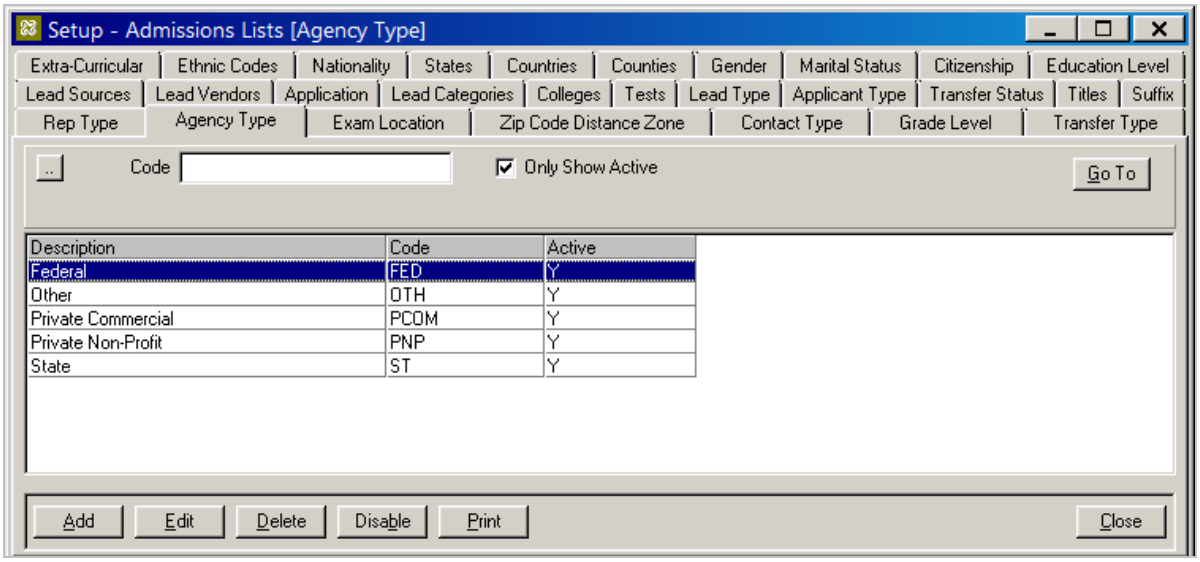
See Maintaining Lists for instructions on adding, editing, deleting, disabling, enabling, and printing lists.

Setup - Admissions Lists [Agency Type]

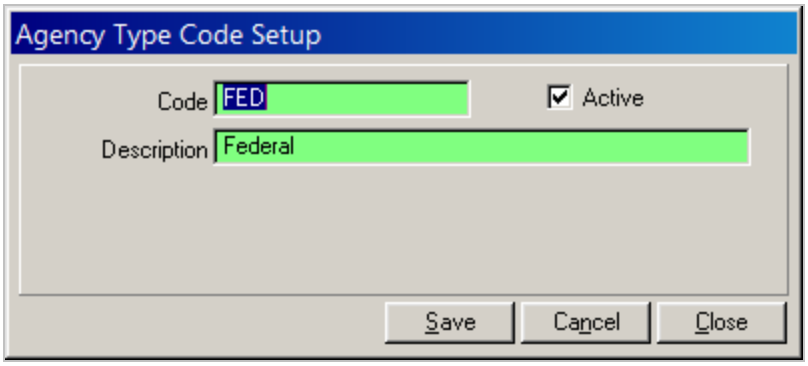
Agency type codes are used when agencies are added or edited from the Daily > Contact Manager > Agency/Third Party menu.

To add or edit a list of agency type codes:

1. Navigate to **Lists** > **Admissions**. The Setup - Admissions Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Agency Type**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Agency Type Code Setup form is displayed.



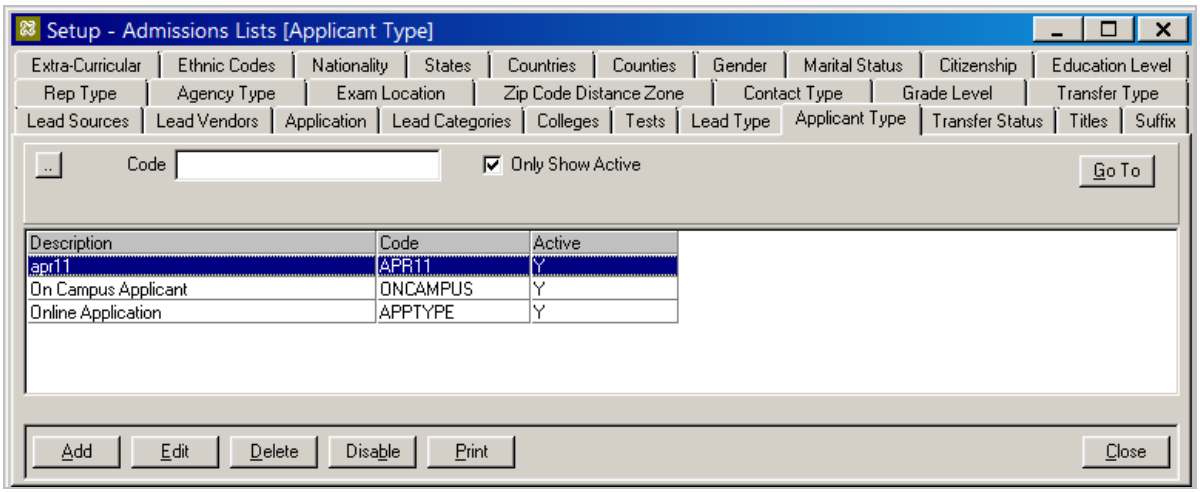
6. Specify a unique **Code**.
7. Enter a **Description**..
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Admissions Lists [Applicant Type]

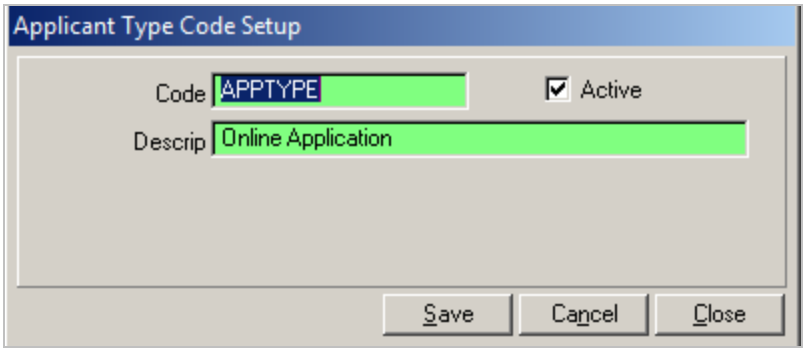
Applicant type codes are used to categorize the type of applicant applying for admission. For example, an institution may want to keep track of the students that fill out applications online and set up an applicant type of 'Online Applicant'.

To add or edit a list of applicant type codes:

1. Navigate to **Lists** > **Admissions**. The Setup - Admissions Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Applicant Type**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Applicant Type Code Setup form is displayed.



6. Specify a unique **Code**.
7. Enter a **Description**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Admissions Lists [Application]

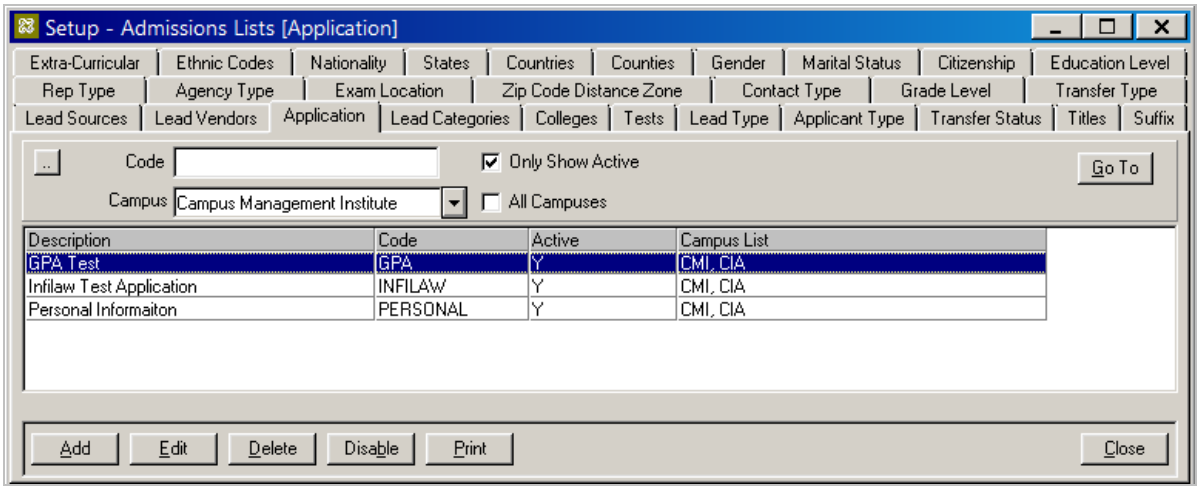
Use the Setup - Admissions Lists [Application] form to view and create Admissions applications. You can perform the following tasks:

- Add or edit a list of application codes
- Add questions and responses to an application
- Preview or print an application
- Print a list of applications

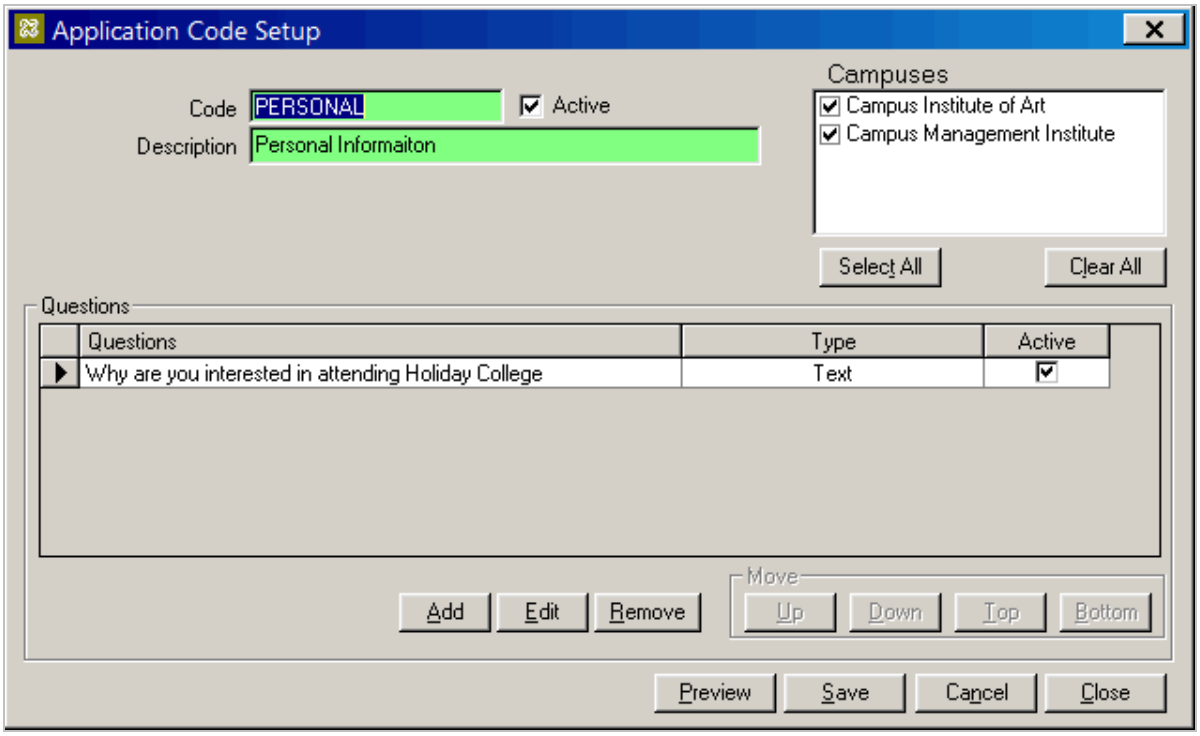
For more information, see Applicant Record Data Elements and Business Processing, Deposits, and Admission Reports.

To add or edit a list of application codes:

1. Navigate to **Lists** > **Admissions**. The Setup - Admissions Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Application**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
6. Click **Add**, or select a record and click **Edit**. The Application Code Setup form is displayed.



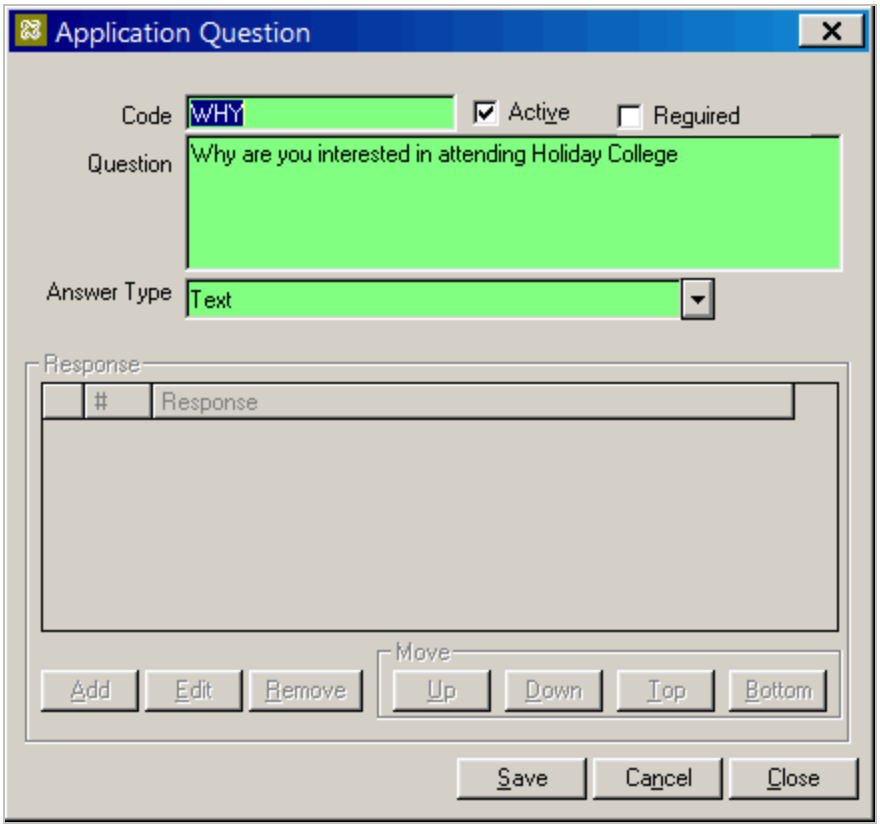
Note: When the option "Use Terms for Academic Year dates" flag is selected on the Campus Information form, Financial Aid Tab, CampusNexus Student creates the missing subsequent academic years for an applicant if the academic year exists for the current enrollment and program version, enrollment status, and exp. start date are selected on the applicant form.

7. Specify a unique **Code**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.If no active application is available for the selected campus, the Active check box is selected by default.
9. Enter a **Description**.
10. Select one or more **Campuses**.

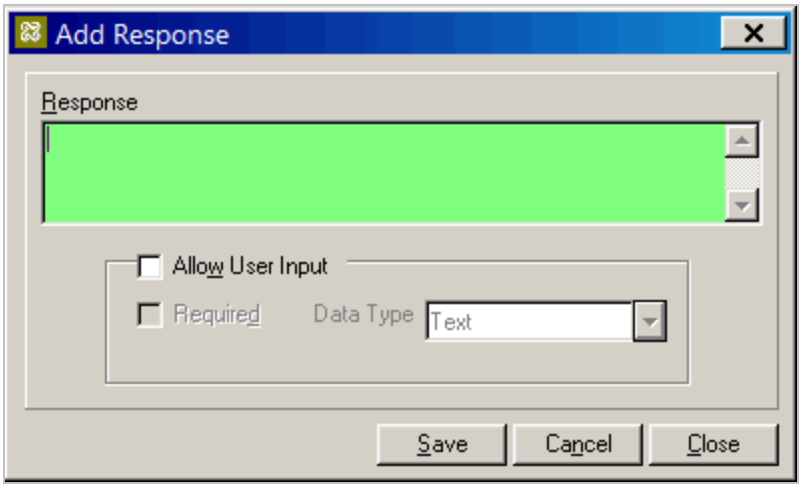
When an application is saved, system defined questions are automatically added to it.

To add questions and responses to the application:

1. Click **Add** in the **Questions** field of the Application Code Setup form. The Application Question Setup form is displayed.



2. Specify a unique **Code**.
3. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
4. Select the **Required** check box to set the status of the question to 'required'. Clear this check box to make the question optional for the student to answer. An application is not considered complete until all required questions are answered.
5. Specify the text of the question in the **Question** field.
6. Select the **Answer Type**. The Answer Type field and the Response area are inactive if you are editing a system-defined question. The answer types are:
    - Multiple Answer Multiple Select
    - Multiple Answer Singe Select
    - Text
    - True/False
    - Yes/No
7. Click **Save**. The Response area in the Application Question Setup form is activated after you save the question for Multiple Answer Multiple Select and Multiple Answer Singe Select answer types.
8. If you selected Multiple Answer Multiple Select or Multiple Answer Single Select as the answer type, click **Add** in the Response area to add the response options for the question. The Add Response form is displayed.



9. Add the response text in the **Response** field. In the application, the response is displayed as a button that the student can select.
10. Select **Allow User Input** if you want the user to be able to provide any more information related to the response you have provided.
11. Select the **Data Type** that you want as the user response. Options are:

    - Date
    - Integer
    - Text.

    Select **Required** if you want the user response to be a required field in the application.
12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.
13. Add more response options for Multiple Answer Multiple Select or Multiple Answer Singe Select answer types as needed.
14. The added responses appear in the Response list in the Application Question form. Use the **Up**, **Down**, **Top**, and **Bottom** buttons to change the sequence in which the responses appear in the application.
15. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.
16. Add more questions to the application if required.
17. The added questions appear in the Questions list in the Application Code Setup form. Use the **Up**, **Down**, **Top**, and **Bottom** buttons to change the sequence in which the questions will appear in the application.
18. Click **Save** to save the application.

To preview or print an application:

1. Click the **Preview** button on the Application Code Setup form, or select an application from the Application tab (**Lists > Admissions > Application** tab) and click the **Print** button. The Application Preview form is displayed. Only questions that are saved with the status of 'Active' are displayed in the application preview.
2. Click **Print** on the Application Preview form to print the application.
3. Click **Close** to close the form.

To print a list of applications:

1. Click **Print**. The Report Selection form is displayed.
2. Select appropriate report options and print the list of applications.
3. On the Campus Selection tab, select appropriate options and click **Continue**. Click to add Campuses to the right side of the form, indicating that you would like the system to gather room categories associated with the Campuses that appear on the right side of the form. Click to remove Campuses listed on the right side of the form.
4. Select the **Yes** or **No** check box next to the Active label. If you select Yes, the *active* Applications appear on the report. If you select No, the *inactive* Applications are listed. Sort the Applications report by Code or Description.

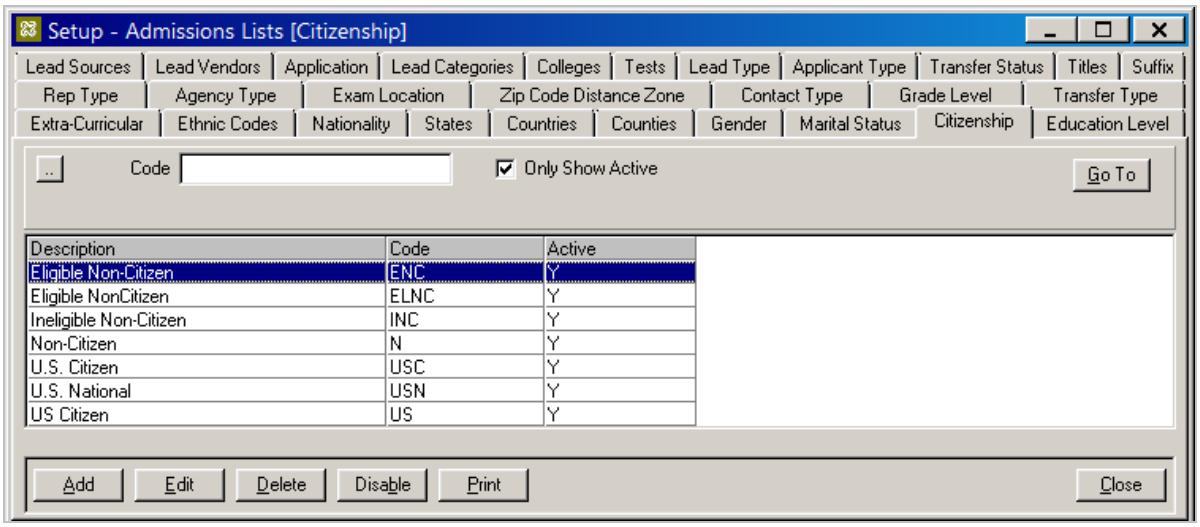
   An informational message is displayed stating "*No records selected for the report*" when you selected to print the active Applications, but there are no active Applications, or you selected to print the inactive Applications and there are no inactive Applications.
5. Click **Preview**. The report is assembled and displayed in the Report Viewer. The report contains the Code, Description, and Active indicator.
6. See Report Viewer for instructions on printing or exporting the report.

Setup - Admissions Lists [Citizenship]

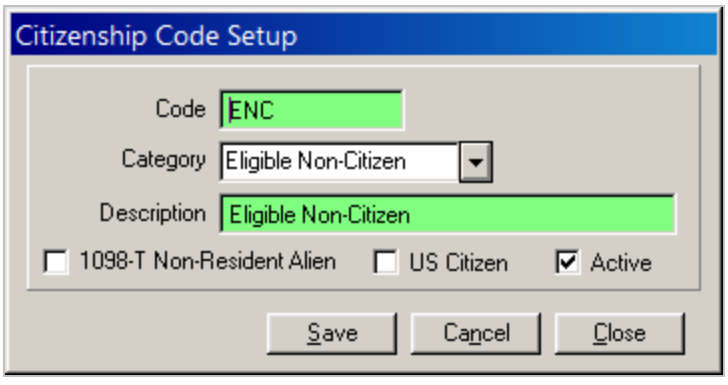
The codes on the Citizenship list are used to indicate a lead's (student's) eligibility for financial aid . The citizenship status is important when a student applies for federal or state financial aid. This is not the place where you record the student's nationality. That is done with the Nationality list.

To add or edit a list of citizenship codes:

1. Navigate to **Lists** > **Admissions**. The Setup - Admissions Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Citizenship**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Citizenship Code Setup form is displayed.



6. Specify a unique **Code**.
7. Select a **Category** for this citizenship code. Citizenship categories are used in some types of financial aid

processing. The categories are:

- U.S. Citizen
- U.S. National
- Eligible Non-Citizen
- Ineligible Non-Citizen

8. Enter a **Description**.
9. Select or clear the **1098-T Non-Resident Alien** check box to designate that students in this citizenship category should only receive 1098-Ts upon request.

   Previously, if this check box was selected, the students were not gathered in a 1098-T batch unless they were manually added by a staff member. As of the 2009 tax year, the 1098-T processing utility allows administrators to select which citizenships should always be included in the batch and which citizenships support the Allow Manual Add feature. By default, any citizenship with this check box selected is selected in the Allow Add category when processing 1098-Ts for the 2009 tax year and forward.
10. Select **U.S. Citizen** if this is your code for designating that a student is a citizen of the United States. CampusNexus Student needs to know which code you use for this purpose.

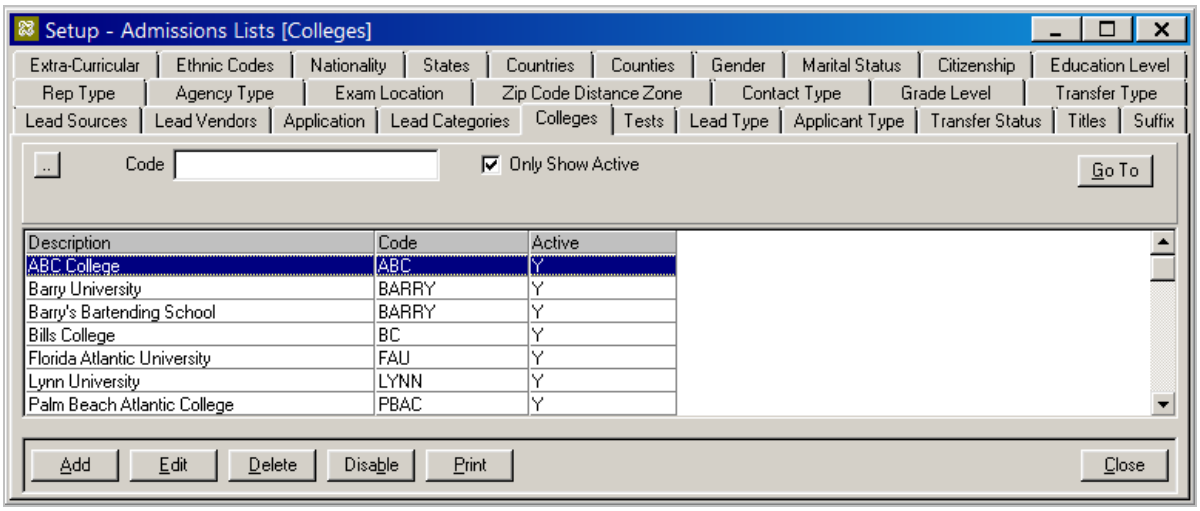
    Citizenships designated as US Citizens are also used as the default for the Include selections in the 1098-T Processing Utility as of the 2009 tax year.
11. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Admissions Lists [Colleges]

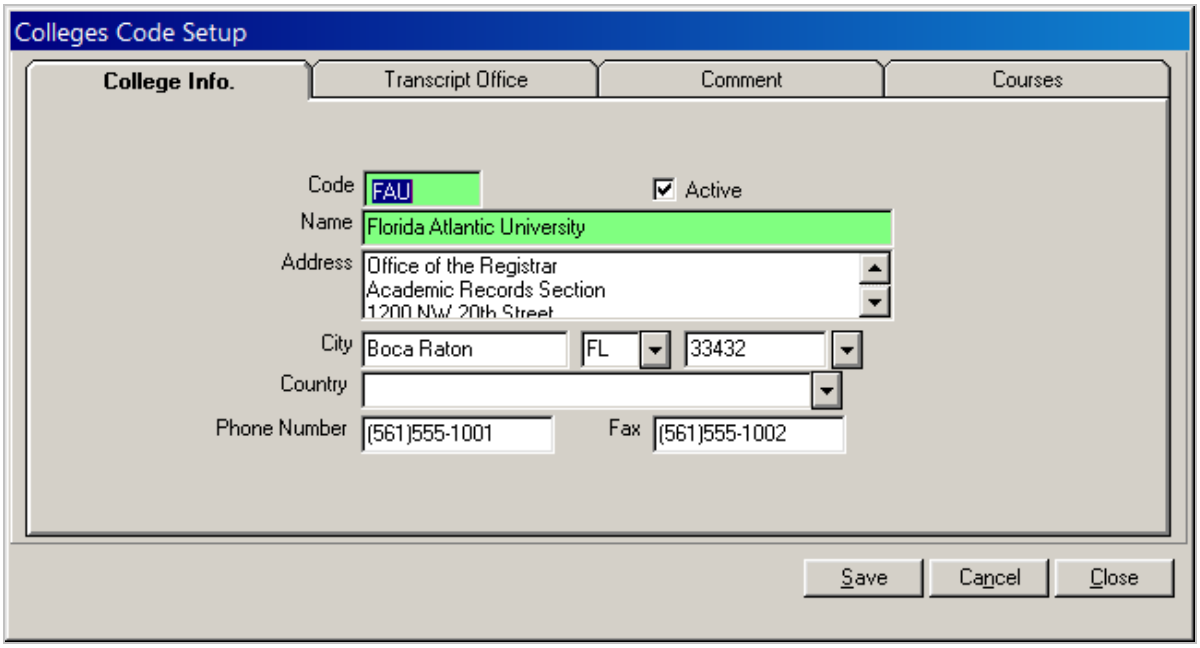
The Colleges list contains the names and addresses of other institutions with which your students have had contact. You can relate these colleges to students on the Education form.

To add or edit a list of college codes:

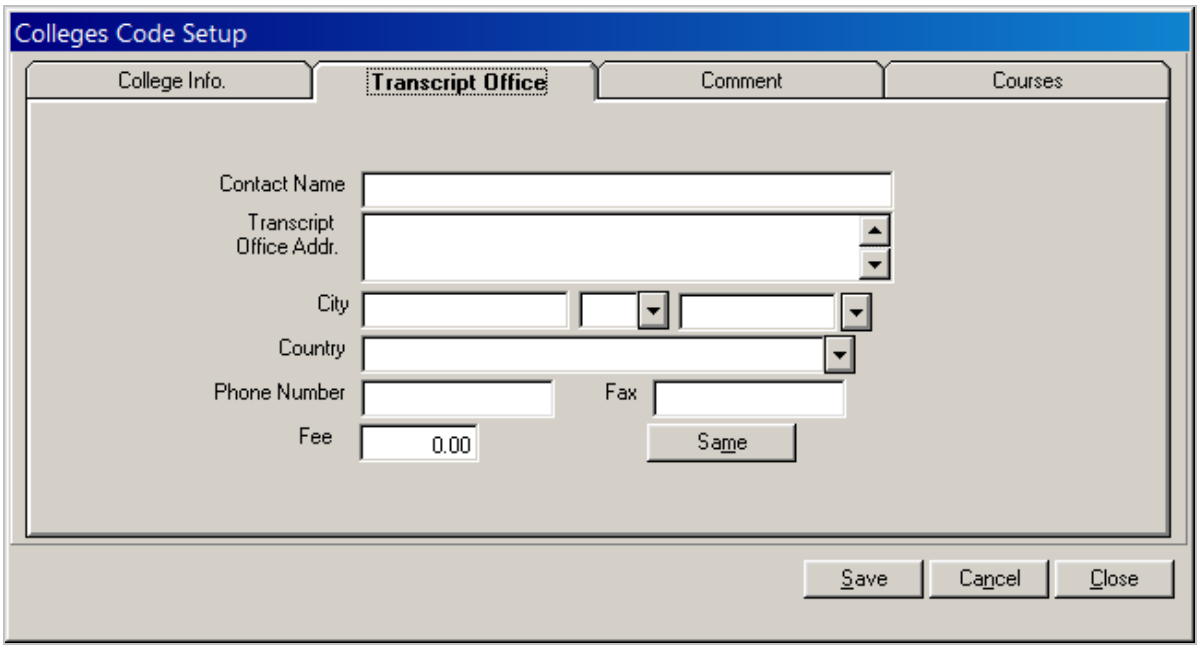
1. Navigate to **Lists** > **Admissions**. The Setup - Admissions Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Colleges**.



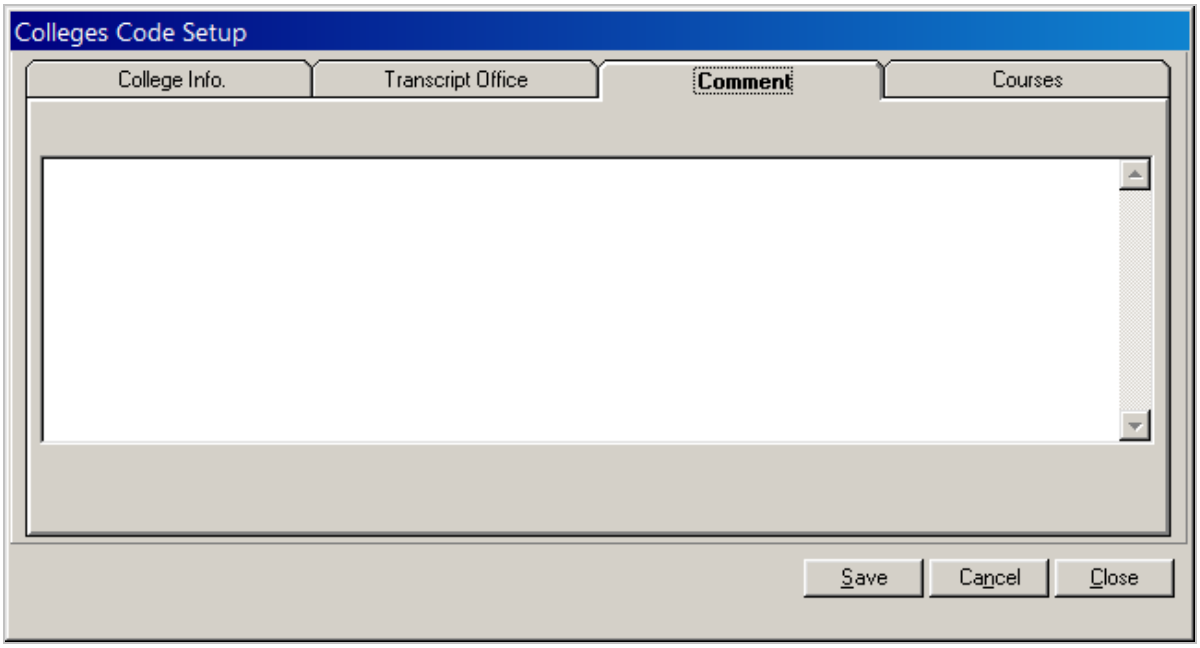
3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Colleges Code Setup form is displayed.



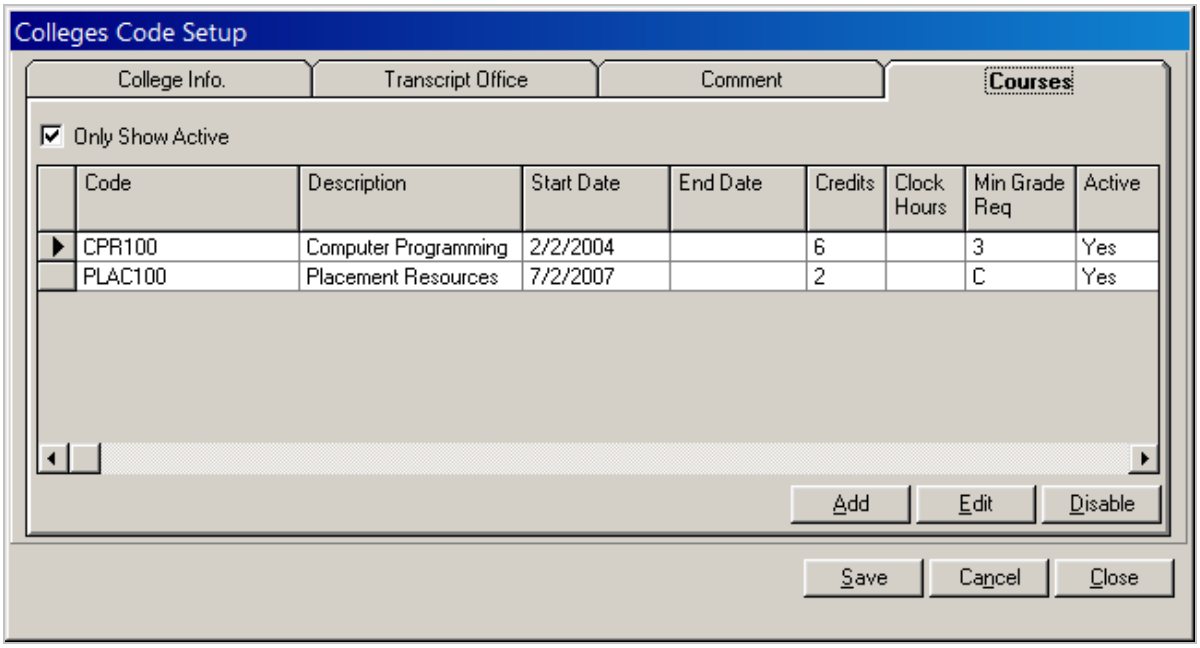
6. Specify a unique **Code**.
7. Specify the **Name** of the college.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Enter the address and phone information.
10. Click **Transcript Office** tab.



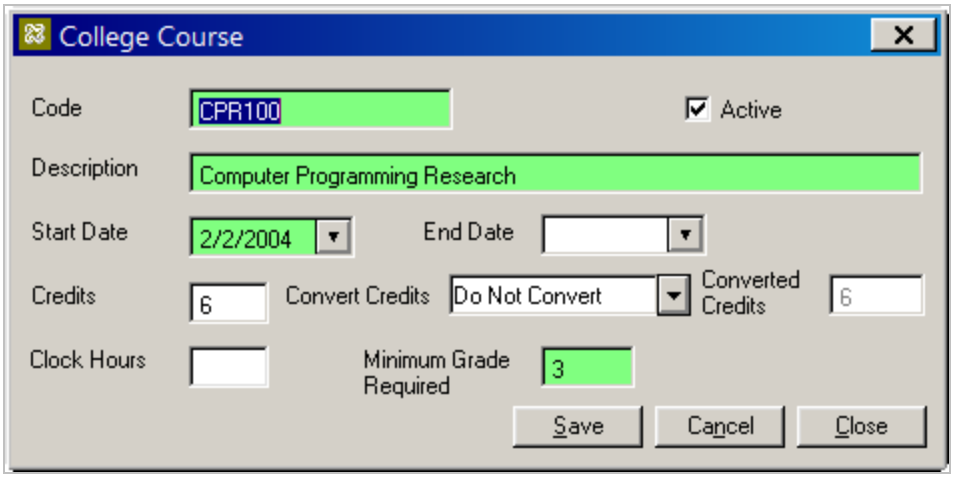
11. Enter the name and address information for the Transcript Office contact. If the address information for the contact is the same as for the school, click **Same**. The college address information is copied to the contact form.
12. Click the **Comment** tab.



13. Enter any comments in the **Comment** field.
14. Click **Save**.
15. Click the **Courses** tab. The form displays a grid showing courses offered by the selected college.



16. Click **Enable/Disable** to enable or disable college courses, respectively.
17. Click **Add** or **Edit**. The College Course form is displayed.



a. Specify a unique **Code** (no more than 16 characters) that indicates a course specific to the campus.

b. Select or clear the **Active** check box to designate the record as active or inactive, respectively.

c. Enter a **Description**.

d. Select the effective **Start Date** (and **End Date**, if known)

e. In the **Credits** field, assign the number of credits that successful completion of the course earns at the selected college.

f. Select a **Convert Credits** option. The options are:

- Do Not Convert (default)
- Quarter Credits
- Semester credits

The conversion result is displayed in the **Converted Credits** field.

- When converting transfer credits from Semester to Quarter credit, CampusNexus Student multiplies the credit value entered for the other college's course by **1.5** to determine the quarter credits and saves this value on the college's course record, unless manually overridden by the user.
- When converting transfer credits from Quarter to Semester credit, CampusNexus Student multiplies the credit value entered for the other college's course by **.67** to determine the semester credits and saves this value on the college's course record, unless manually overridden by the user.

g. In the **Clock Hours** field enter clock hours for the course if applicable.

h. In the **Minimum Grade Required** enter the letter grade required to earn credits.

i. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

You are returned to the Colleges Code Setup form.

18. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

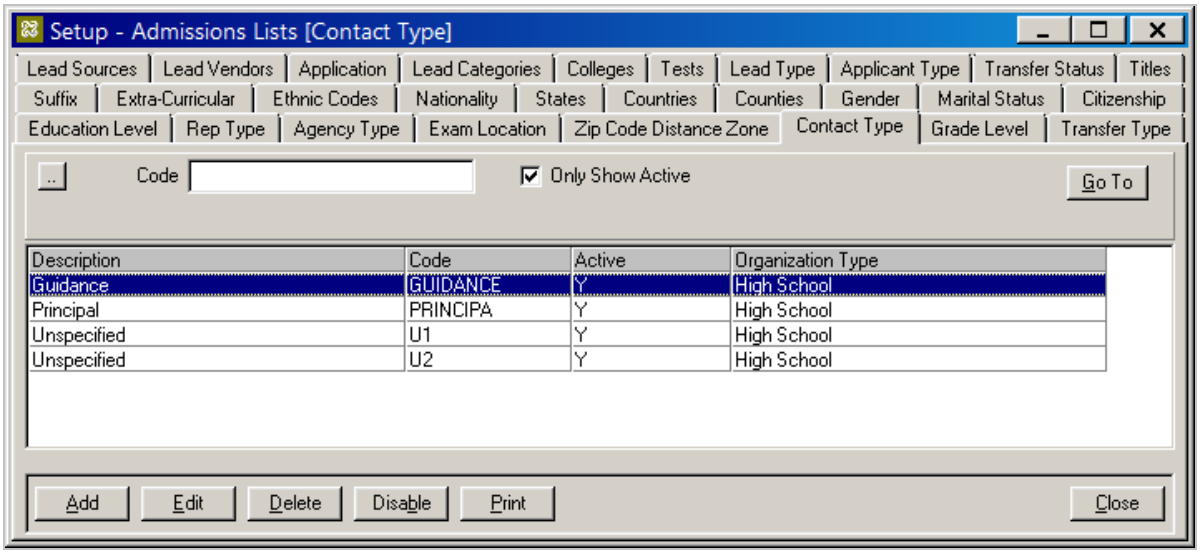
Setup - Admissions Lists [Contact Type]

The Contact Types lists is used defined codes for contacts high schools and the general public.

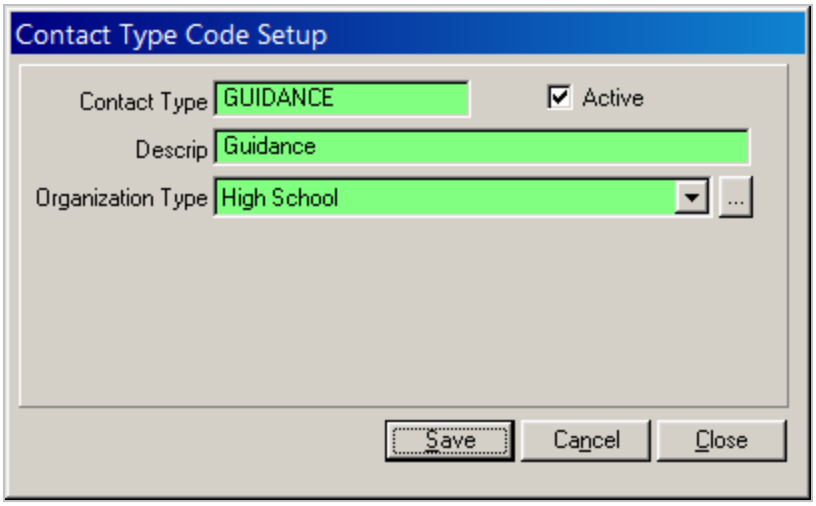
- High school contacts are recorded on the Education form when Admissions staff associate a high school with a student. The student's primary high school contact can be different from the institution's primary high school contact.
- General public contacts are recorded when campus security records information about individuals who are not staff or students who may have been involved in incidents that have occurred on or near campus. A general public contact type code can be used to define categories such as guests of students, vendors, contractors, and local residents.

To add or edit a list of contact type codes:

1. Navigate to **Lists** > **Admissions**. The Setup - Admissions Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Contact Type**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Contact Type Code Setup form is displayed.



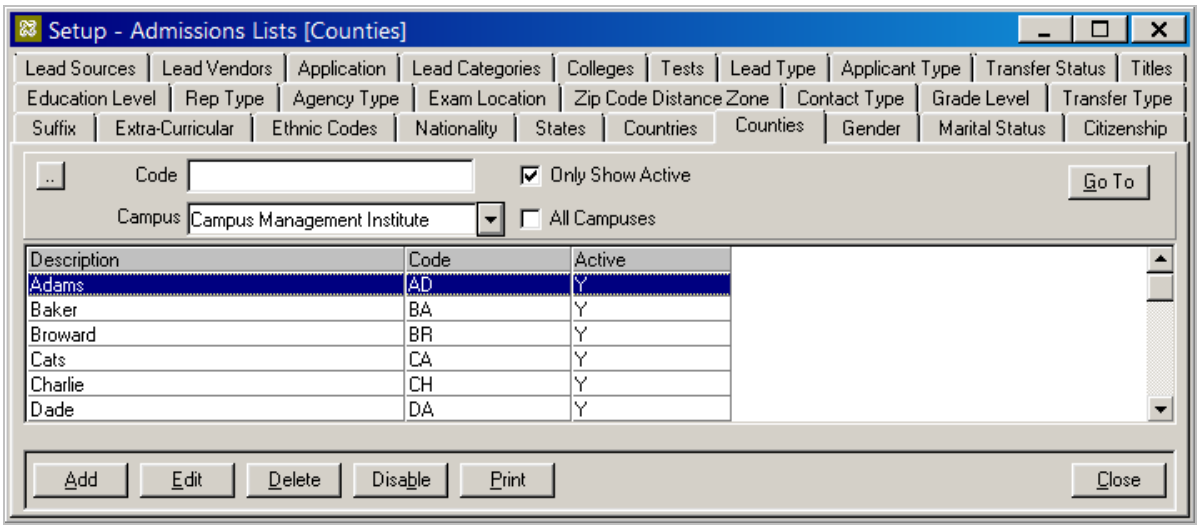
6. Specify a unique **Code**..
7. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
8. Enter a **Description**.
9. Select an associated **Organization Type** to create an association between the contact type and the organization type. The options are:
    - High School
    - General Public
10. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Admissions Lists [Counties]

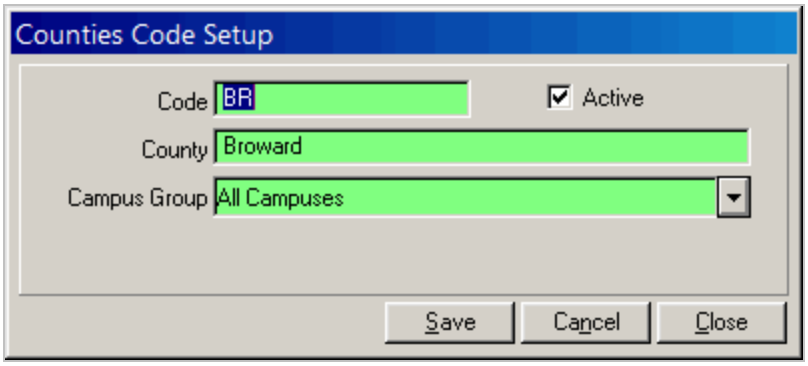
The Counties list contains codes and names of counties in which your students reside. Populate this list with the counties surrounding your campuses and any other counties from which your student population is drawn. A field on the Student Master form uses this list.

To add or edit a list of county codes:

1. Navigate to **Lists** > **Admissions**. The Setup - Admissions Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Counties**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
6. Click **Add**, or select a record and click **Edit**. The Counties Code Setup form is displayed.



7. Specify a unique **Code**.

8. Enter a **Description**.
9. Select a **Campus Group** to which the county code is related.
10. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
11. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Admissions Lists [Countries]

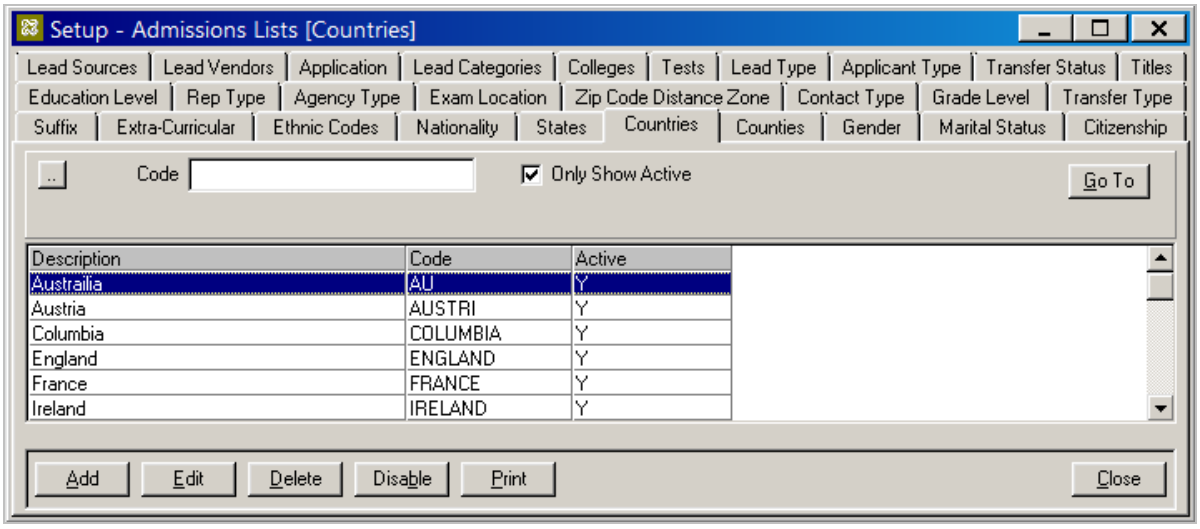
Use the Countries Code Setup form to create a list of countries from which your students are drawn. The Country codes are used on the Student Master form.

The code for The United States of America (USA) is optional unless your school is not in the USA. Mailing addresses typically do not need to show the country when it is the home country of the school. If country is a required field on your Student Master form, you must set up a code for the USA, even if the post office does not require it for mailing addresses.

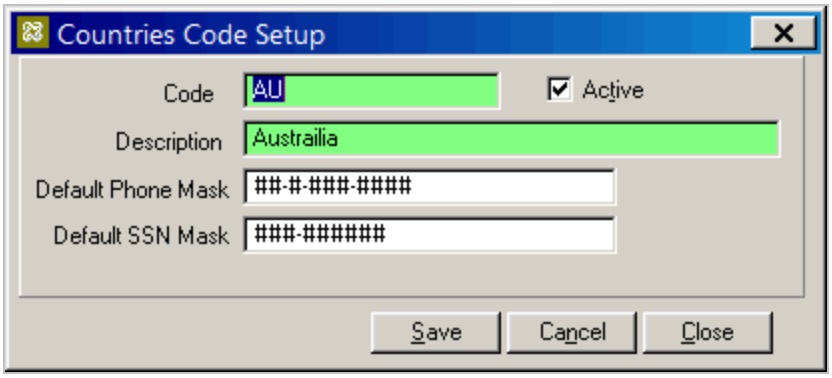
Note: The Countries code list is not the same as the Nationality code list, even though the two lists are likely to have similar entries. For instance, in countries, a person whose address may include a country called Japan, might have a nationality code of Japanese. Likewise, country is not the same thing as Citizenship, which refers to whether the student is a U.S. citizen or some other citizenship classification.

To add or edit a list of country codes:

1. Navigate to **Lists** > **Admissions**. The Setup - Admissions Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Countries**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Countries Code Setup form is displayed.



6. Specify a unique **Code**.
7. Enter a **Description**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Specify the **Default Phone Mask**.
10. Set up the two mask fields for each country in which the institution does business or from which it receives students. Valid characters for the mask fields are:

    + Plus sign

    - Hyphen

    (Open parenthesis

) Close parenthesis

    # Octothorpe (the pound sign is a place-holder for digits 0 - 9)

    . Period

    Space - Embedded spaces only, no leading or trailing spaces.

    0 Zero (In the leading positions, zero is used to indicate that leading zeros are permitted in the field; in other positions, zero represents a constant. For instance, to allow a Social Security Number such as 093-22-1060, the mask must be 0##-##-####. The U.S. does have Social Security Numbers beginning with zero.)

    No other characters are accepted in the mask fields.
11. Specify the **Default SSN Mask**. Valid mask characters are the same as those used in the Default Phone mask.
12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Admissions Lists [Education Level]

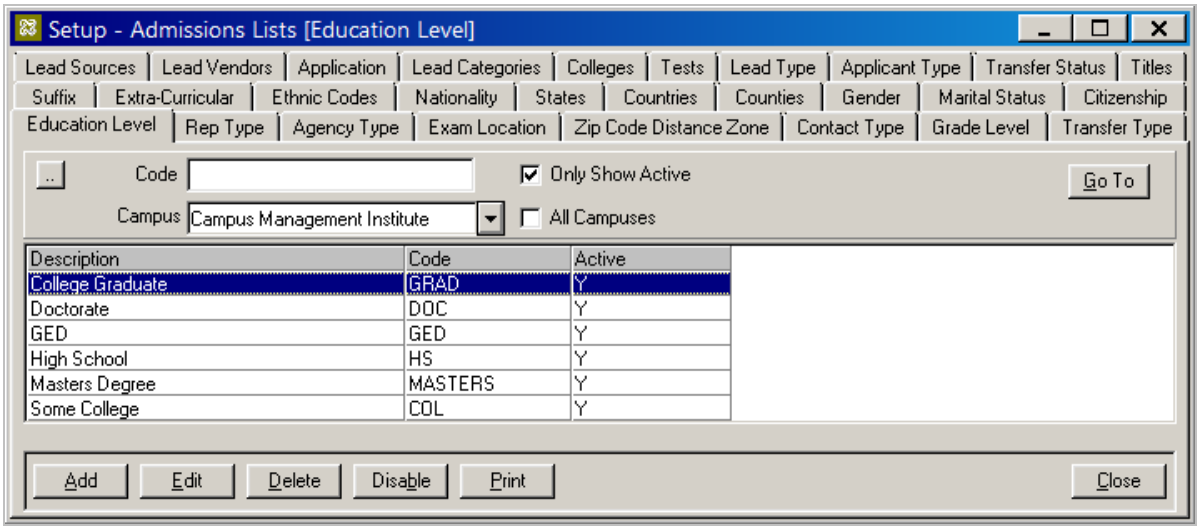
The Education Level list is used to categorize leads (students) by their level of previous education and to associate the lead types with the appropriate Ability to Benefit (ATB) codes. Set up the education levels that are appropriate for your institution.

For years 2013-14 and forward, COD stores new valid ATB values, for students with a high school diploma (06) or a GED (07). Codes 03 and 05 are no longer valid. If you have students with ATB codes of 03 or 05, you must change the code for their record to pass COD validation.

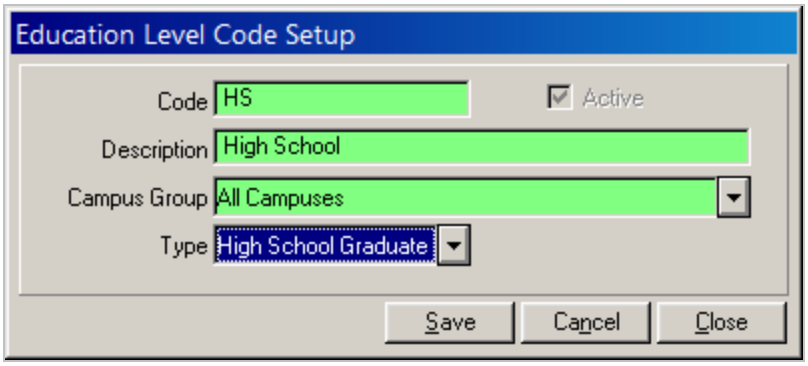
Important: For a student to receive Title IV funding, there must be a valid ATB code associated with their records (in the Prev Education field of the Student Master). Many students may not have a valid ATB code assigned, or they may have no ATB code assigned. Student records lacking a proper ATB code fail validation at COD.

To add or edit a list of education level codes:

1. Navigate to **Lists** > **Admissions**. The Setup - Admissions Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Education Level**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
6. Click **Add**, or select a record and click **Edit**. The Education Level Code Setup form is displayed.



7. Specify a unique **Code**.
8. Enter a **Description**.
9. Select a **Campus Group** to which the education level is related.
10. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
11. Select the **Type** to which the code is related. These types are College, High School, GED, ATB, and None.

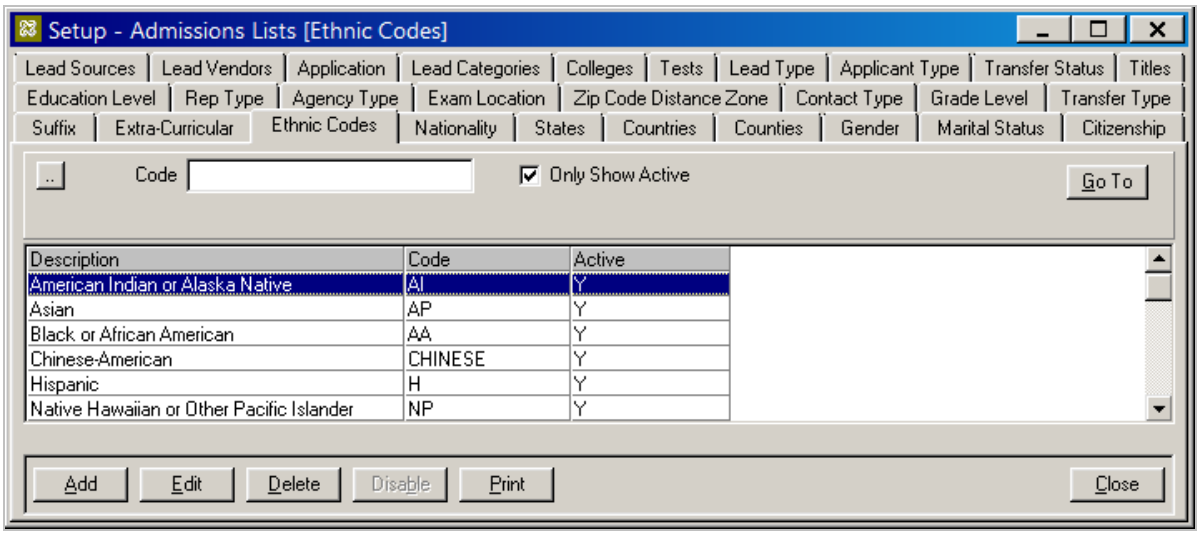
    Note: The types College or None should be used for codes assigned to students who are not eligible for Title IV funding (and will not be part of COD processing) because they have a college degree but cannot prove they have a GED or have graduated from a high school.
12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Admissions Lists [Ethnic Codes]

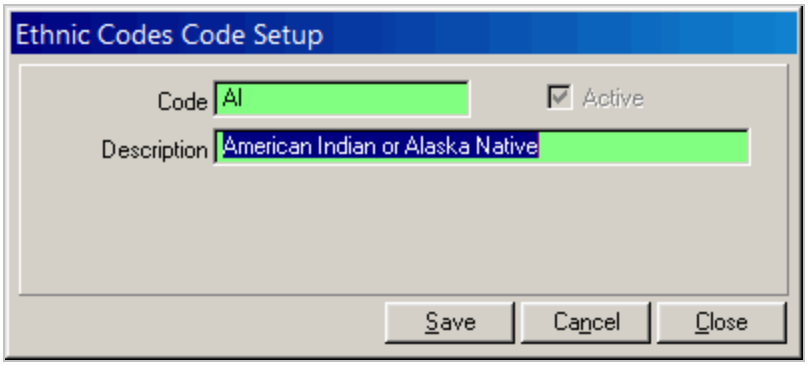
The Ethnic Codes list is used to classify students for population and demographic reports such as the Department of Education IPEDS report. CampusNexus Student is installed with the standard Department of Education codes. You can add codes if necessary.

To add or edit a list of ethnic codes:

1. Navigate to **Lists** > **Admissions**. The Setup - Admissions Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Ethnic Codes**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Ethnic Codes Code Setup form is displayed.



6. Specify a unique **Code**.
7. Enter a **Description**.

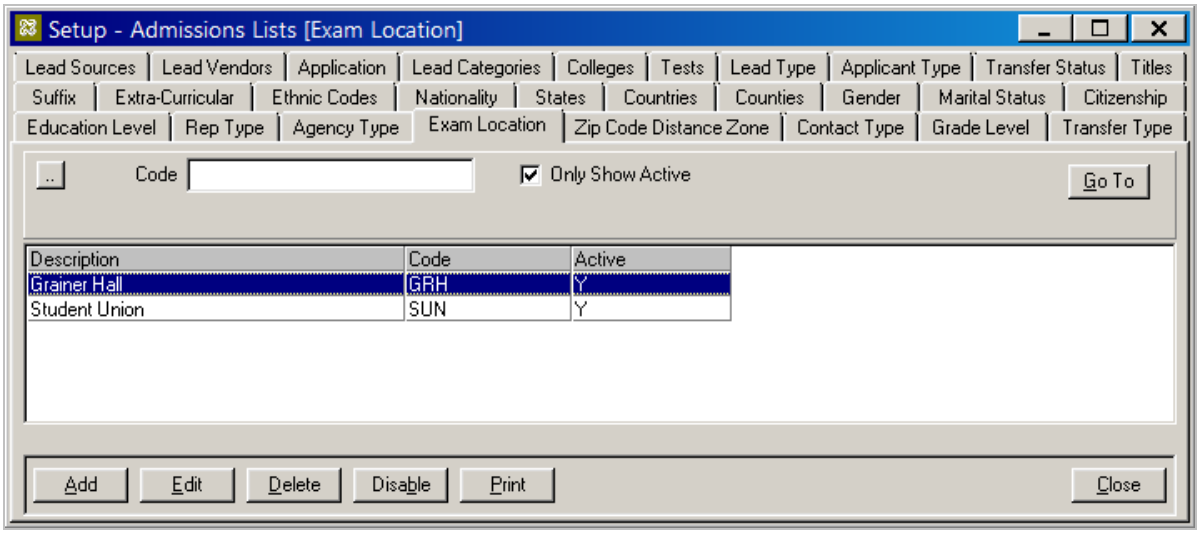
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Admissions Lists [Exam Location]

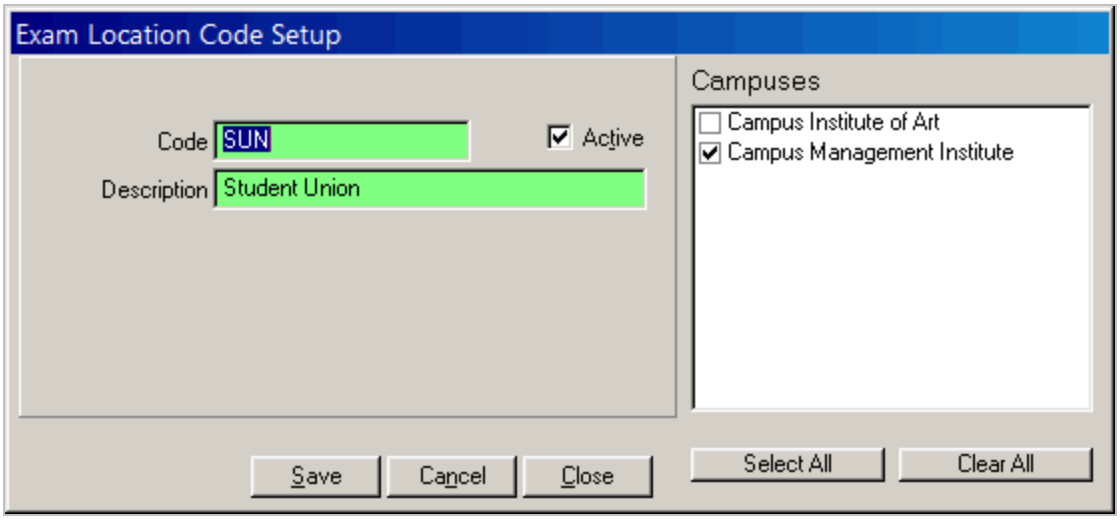
Exam Location codes are linked to sites where exams are administered.

To add or edit a list of exam location codes:

1. Navigate to **Lists** > **Admissions**. The Setup - Admissions Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Exam Location**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Exam Location Code Setup form is displayed.



6. Specify a unique **Code**.

7. Enter a **Description**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Select the **Campuses** to which the exam location applies.
10. Select or clear the **Active** check box to designate the record as active or inactive, respectively.

Setup - Admissions Lists [Extra-Curricular]

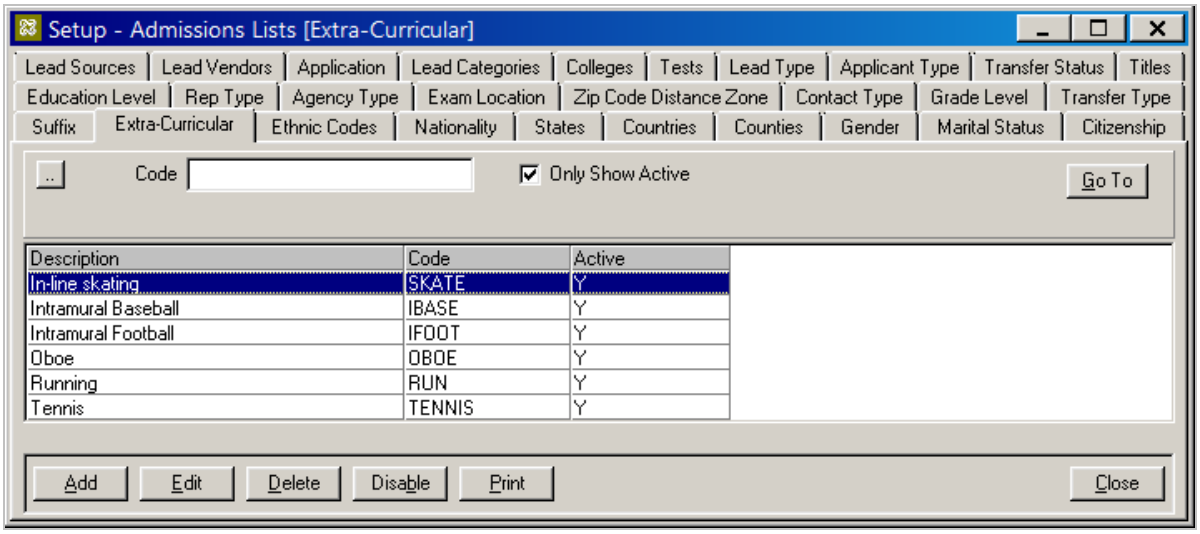
The Extra-Curricular list contains codes that describe a student's extra-curricular activities such as intramural sports, clubs, and so on.

If this information is not significant in your institution, you can change the meaning of this list to something that is more important. For example, a school of music might find an instrument list more useful. To accomplish this, change the label of the data field in the data dictionary at Setup > Data Dictionary. Changing the label of the field in the data dictionary will not change the label on the Lists tab, but it will change it on the Student Master form.

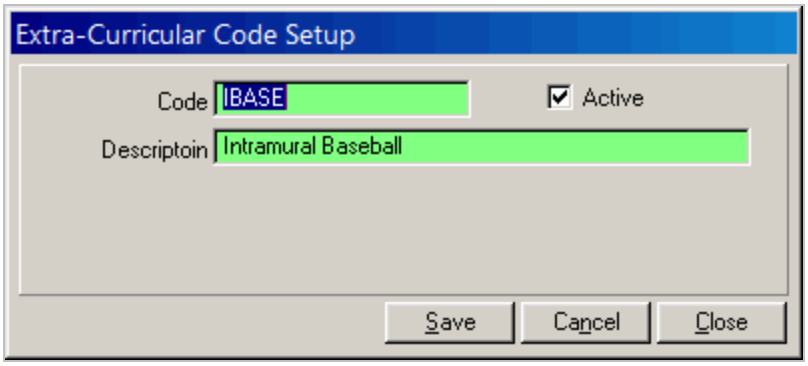
There is no generic CampusNexus Student report that shows this field as related to individual students, but it could be added to one by the system administrator at your institution. (See Setup > Report Maintenance.)

To add or edit a list of extra-curricular codes:

1. Navigate to **Lists** > **Admissions**. The Setup - Admissions Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Extra-Curricular**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Extra-Curricular Code Setup form is displayed.



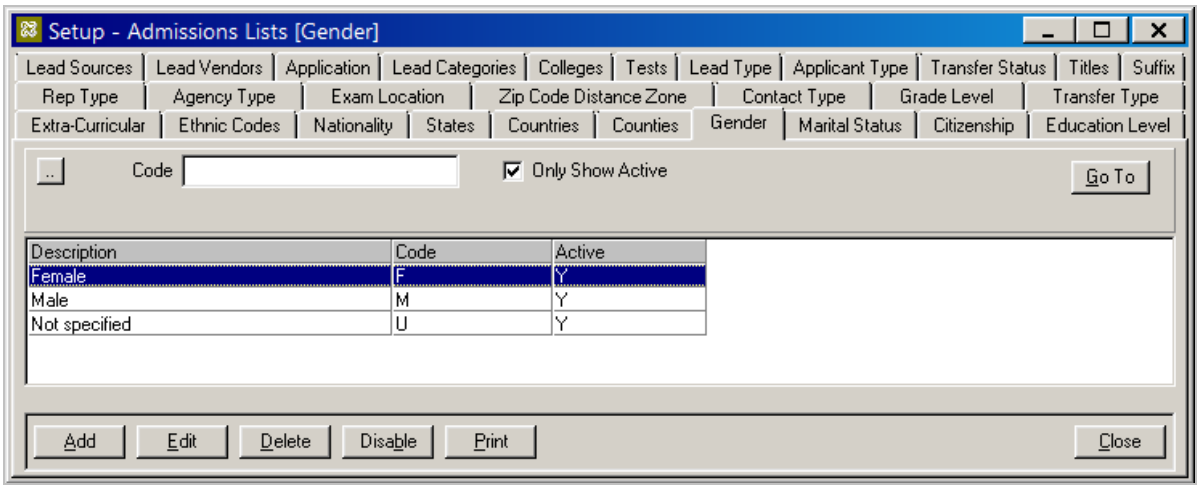
6. Specify a unique **Code**.
7. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
8. Enter a **Description**.
9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Admissions Lists [Gender]

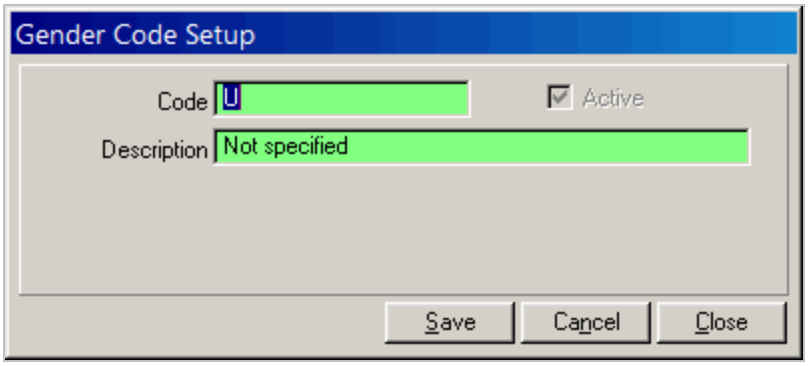
The Gender list is a table of gender (sex of student) codes used in your institution. One of these codes is recorded in each lead (student) record.

To add or edit a list of gender codes:

1. Navigate to **Lists** > **Admissions**. The Setup - Admissions Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Gender**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Gender Code Setup form is displayed.



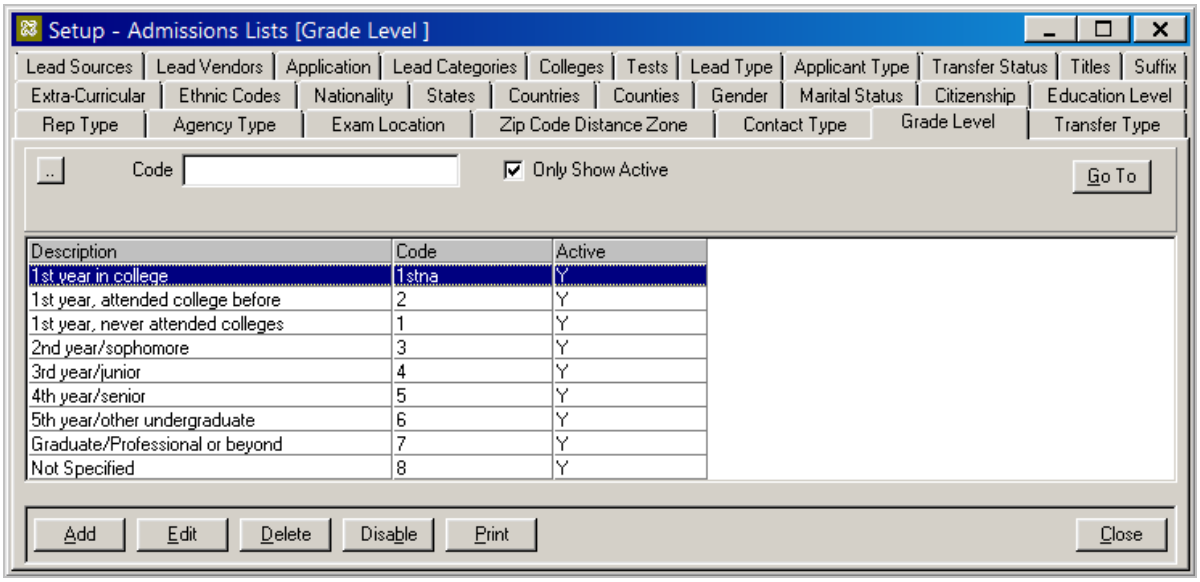
6. Specify a unique **Code**.
7. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
8. Enter a **Description**.
9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Admissions Lists [Grade Level]

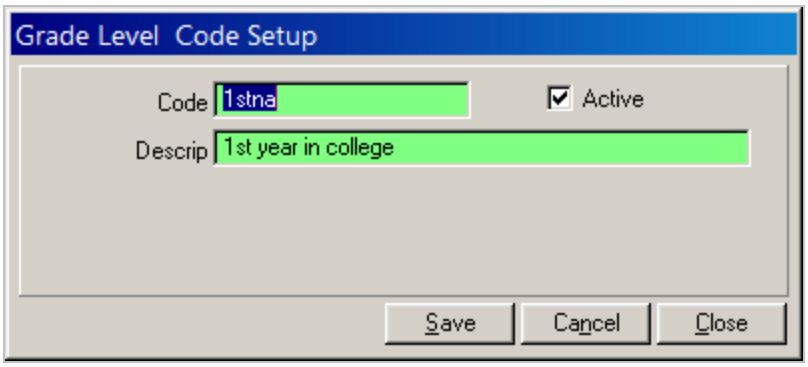
The Grade Level list is used for the selection of grade levels when entering applicant records.

To add or edit a list of state codes:

1. Navigate to **Lists** > **Admissions**. The Setup - Admissions Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Suffix**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Grade Level Code Setup form is displayed.



6. Specify a unique **Code**.
7. Select or clear the **Active** check box to designate the record as active or inactive, respectively.

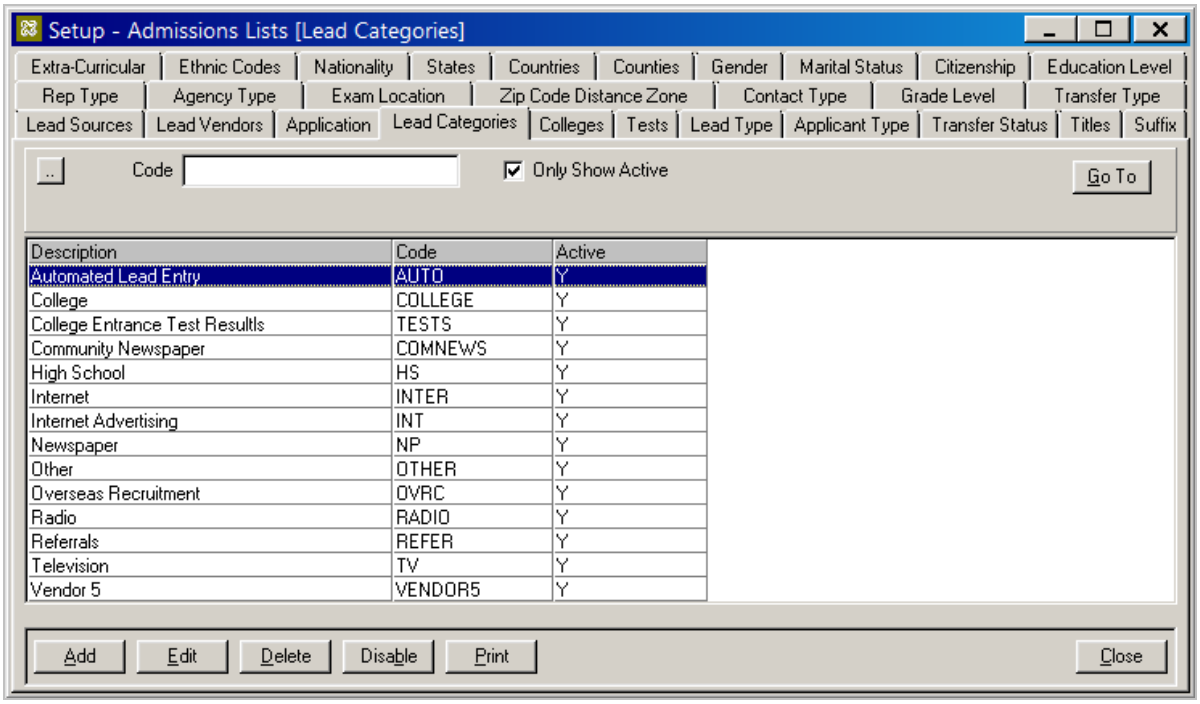
8. Enter a **Description**.
9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Admissions Lists [Lead Categories]

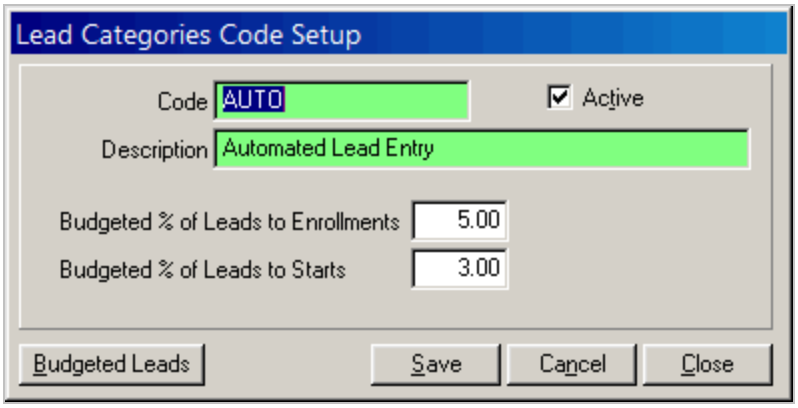
Lead Categories are used to classify lead sources into groups for the analysis of marketing effectiveness. You can run reports to determine which category of lead sources generates most leads. You can specify budget data for lead categories that are used in the Executive Summary Report.

To add or edit a list of lead category codes:

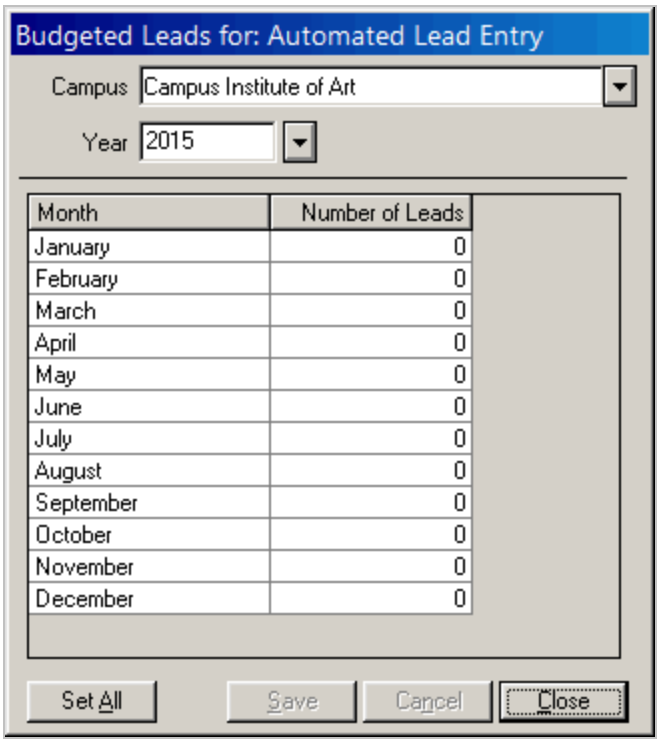
1. Navigate to **Lists** > **Admissions**. The Setup - Admissions Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Lead Categories**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Lead Categories Code Setup form is displayed.



6. Specify a unique **Code**.
7. Enter a **Description**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Specify the **Budgeted Percentage of Leads to Enrollments**.
10. Specify the **Budgeted Percentage of Leads to Starts**.
11. Click **Budgeted Leads**. The Budgeted Leads form is displayed.



a. Select the **Campus**.
b. Select the **Budget Year**.
c. Enter the lead budget data for each of the months. If all months are the same, enter the first month and click

Set All to set all months to the same value.

d. Change the **Budget Year** and repeat entering the monthly budgets for the next year.

e. Change the **Campus** and repeat entering the budget year data for the next campus.

f. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. You are returned to the Lead Categories Code Setup form.

12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

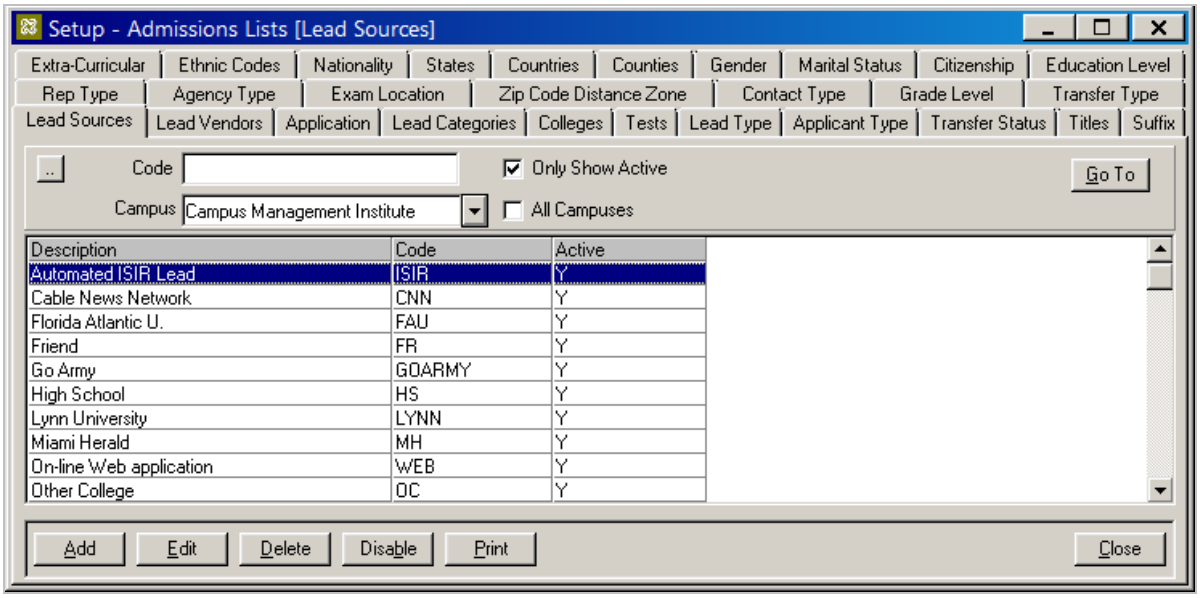
Setup - Admissions Lists [Lead Sources]

The lead source list is used to specify how a lead (prospect) heard about your institution. One or more lead source codes can be recorded in a lead's record and later summarized with others to measure the effectiveness of your advertising program.

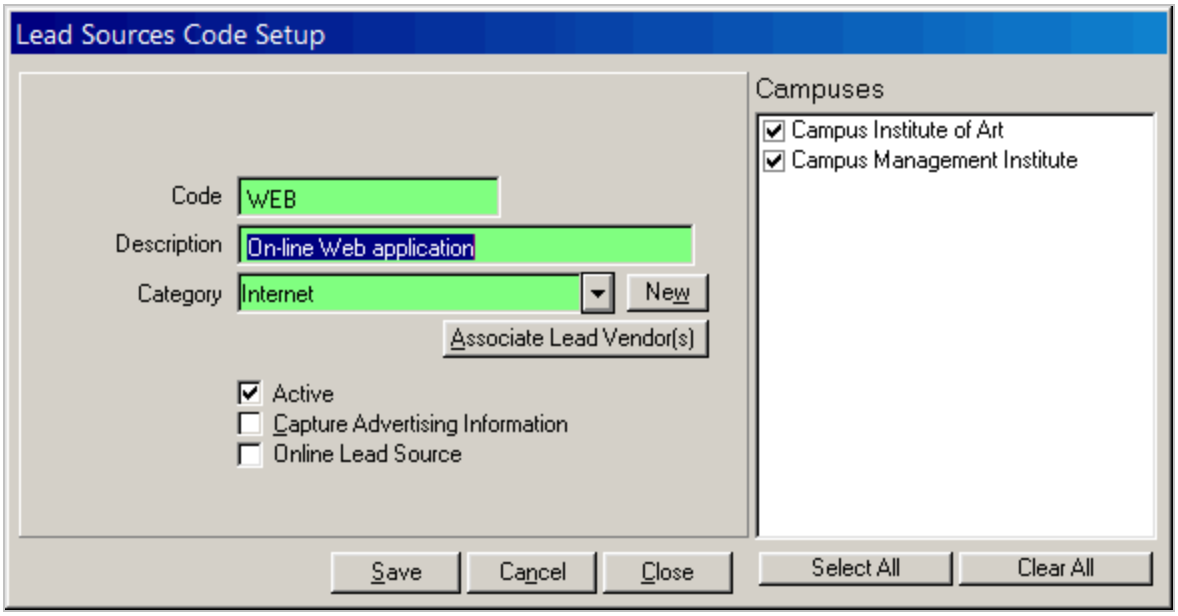
Each lead source is associated with a lead category. Lead categories are used to classify lead sources for further analysis in groups such as newspapers, radio, television, flyers, and so on.

To add or edit a list of lead source codes:

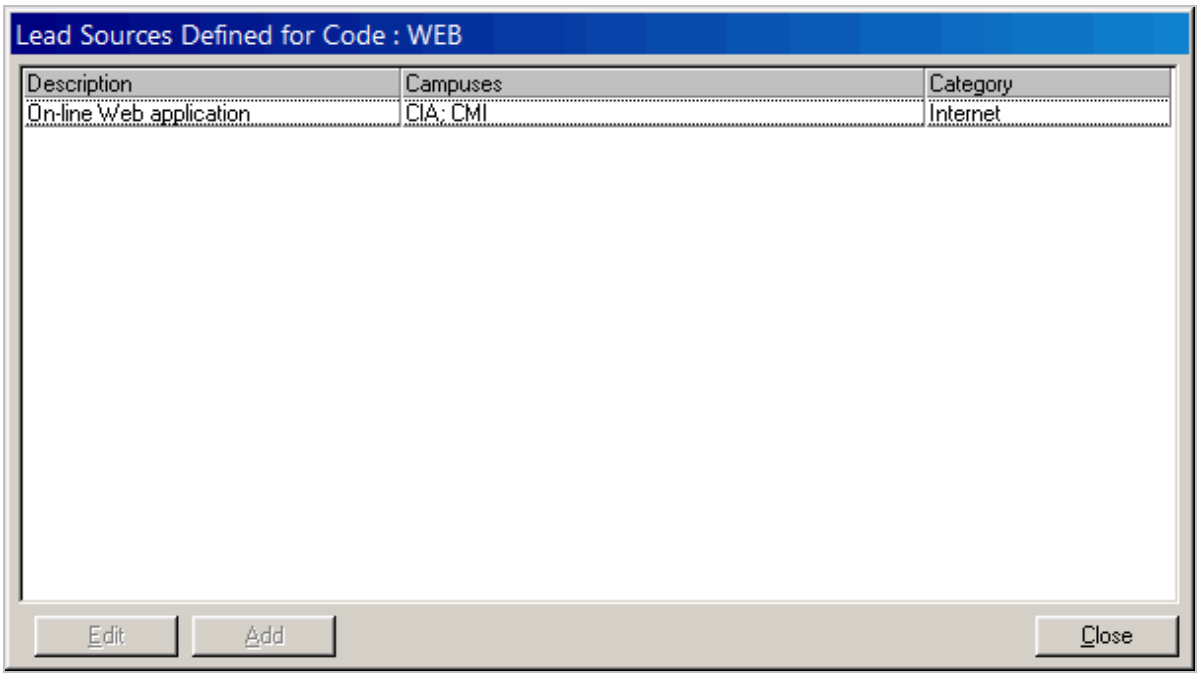
1. Navigate to **Lists** > **Admissions**. The Setup - Admissions Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Lead Sources**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
6. Click **Add**, or select a record and click **Edit**. The Lead Sources Code Setup form is displayed.



7. Specify a unique **Code**.
8. Enter a **Description**.
9. If you are adding a duplicate lead source code, when you leave the Code field, a form lists all duplicates of the code you entered.



10. If, after reviewing the list, you want to continue adding the new lead source code, click **Add**. CampusNexus Student displays the Lead Source Code Setup form again, after eliminating all campuses for which the code already exists.
11. In the Category field on the Lead Sources Code Setup form, click

and select a Category to which the lead source belongs.

If necessary, click to add a Category. The Code Setup form is displayed. Specify a Code and Description. CampusNexus Student inserts the new Code in the Lead Source Category list box when you save it.

12. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
13. Select or clear **Capture Advertising Information** as required. If selected, this lead source is included in the Lead Source Performance report. (Reports > Admissions > Lead Source Performance).

    Note: The Capture Advertising Information check box on the Lead Sources Code Setup form must be selected and the Track Multiple Lead Inquiries check box (Setup > Campus Locations > Add/Edit Campus > Allow tab > Student Inquiries) must be selected for the Response Number, Response Time, and Response Date fields to be displayed on the Student Inquiry form.
14. Select or clear **Online Lead Source** as required. If selected, this lead source appears as an option in the Lead Source drop-down list in Step 1 of the application and request information process in Portal.
15. Select one or more **Campuses**.
16. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

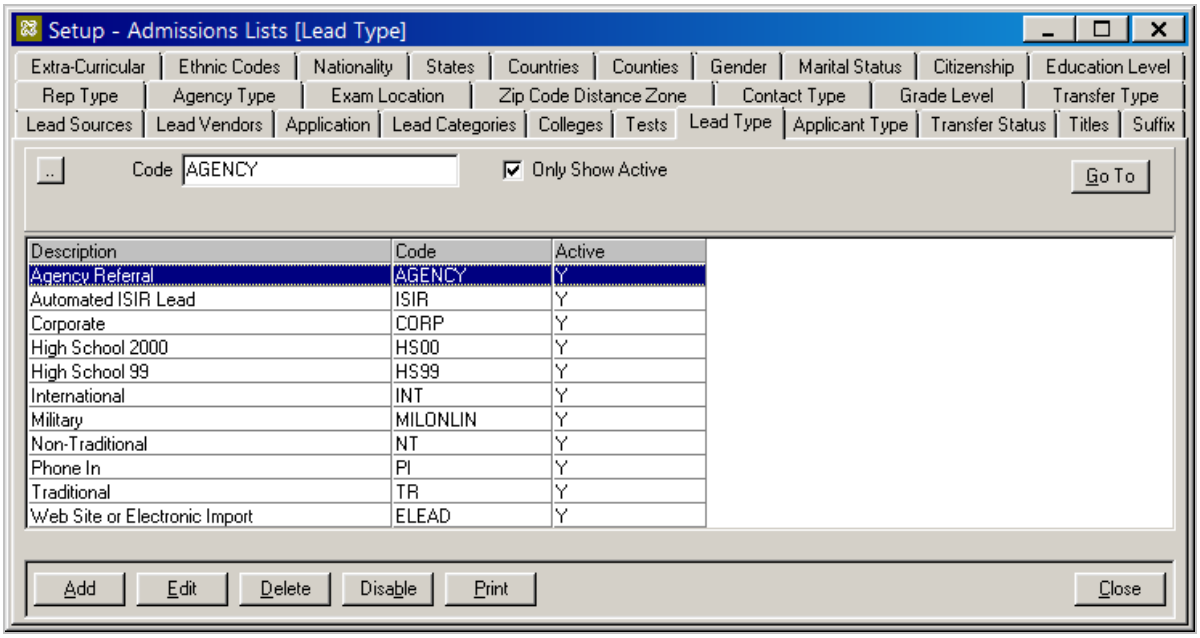
Setup - Admissions Lists [Lead Types]

Lead types are used to classify your leads according to any grouping you find useful. Lead types can refer to the background from which the lead comes such as high school or corporation.

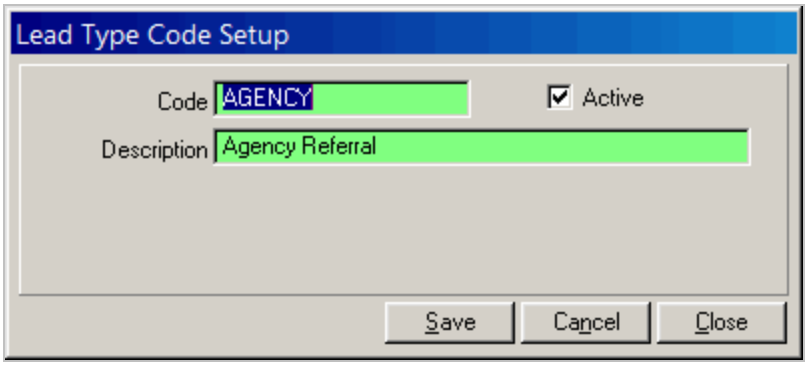
Lead types are different from lead sources and lead categories because lead types are not necessarily related to marketing and advertising efforts, although there may be some correlation between the source of the lead and the type of lead produced.

To add or edit a list of lead type codes:

1. Navigate to **Lists** > **Admissions**. The Setup - Admissions Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Lead Type**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Lead Type Code Setup form is displayed.



6. Specify a unique **Code**.
7. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
8. Enter a **Description**.
9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Admissions Lists [Lead Vendors]

The Lead Vendors list is used to designate the vendors who provided leads (prospects). Institutions can use this data to obtain metrics on lead vendors, sub vendors, affiliates, search engine optimization tactics, and any other data element sent with the source of the lead.

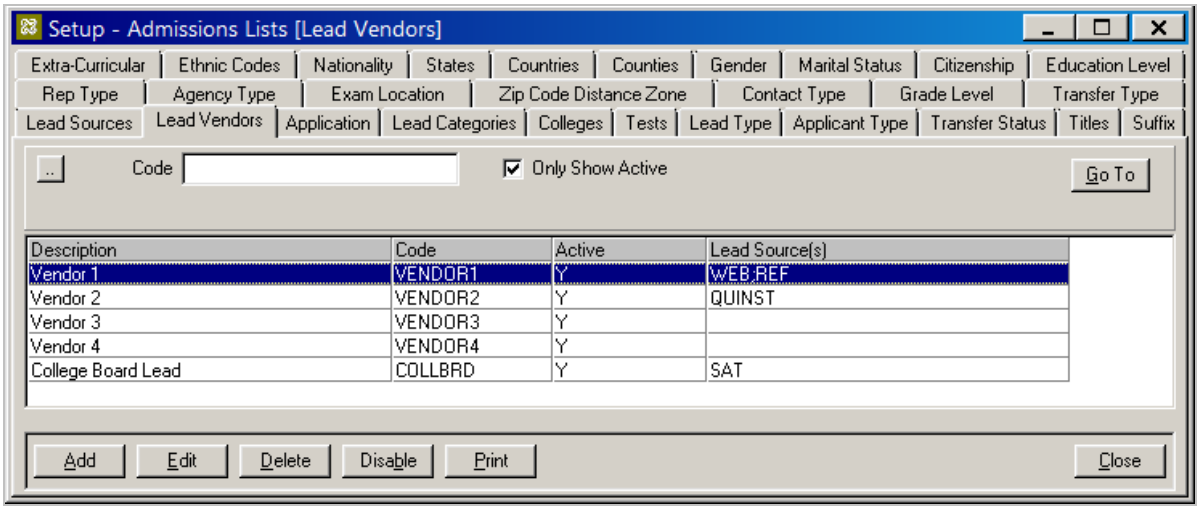
You can do the following with lead vendor tracking:

- Define list of lead vendors in CampusNexus Student.
- Capture and store an additional data field, from eLeads, in the database.
- Associate multiple lead sources to vendors, when adding or editing lead vendors.
- Associate multiple lead sources to sub vendors (if the sub vendor has been associated with the selected vendor), when adding or editing sub vendors.

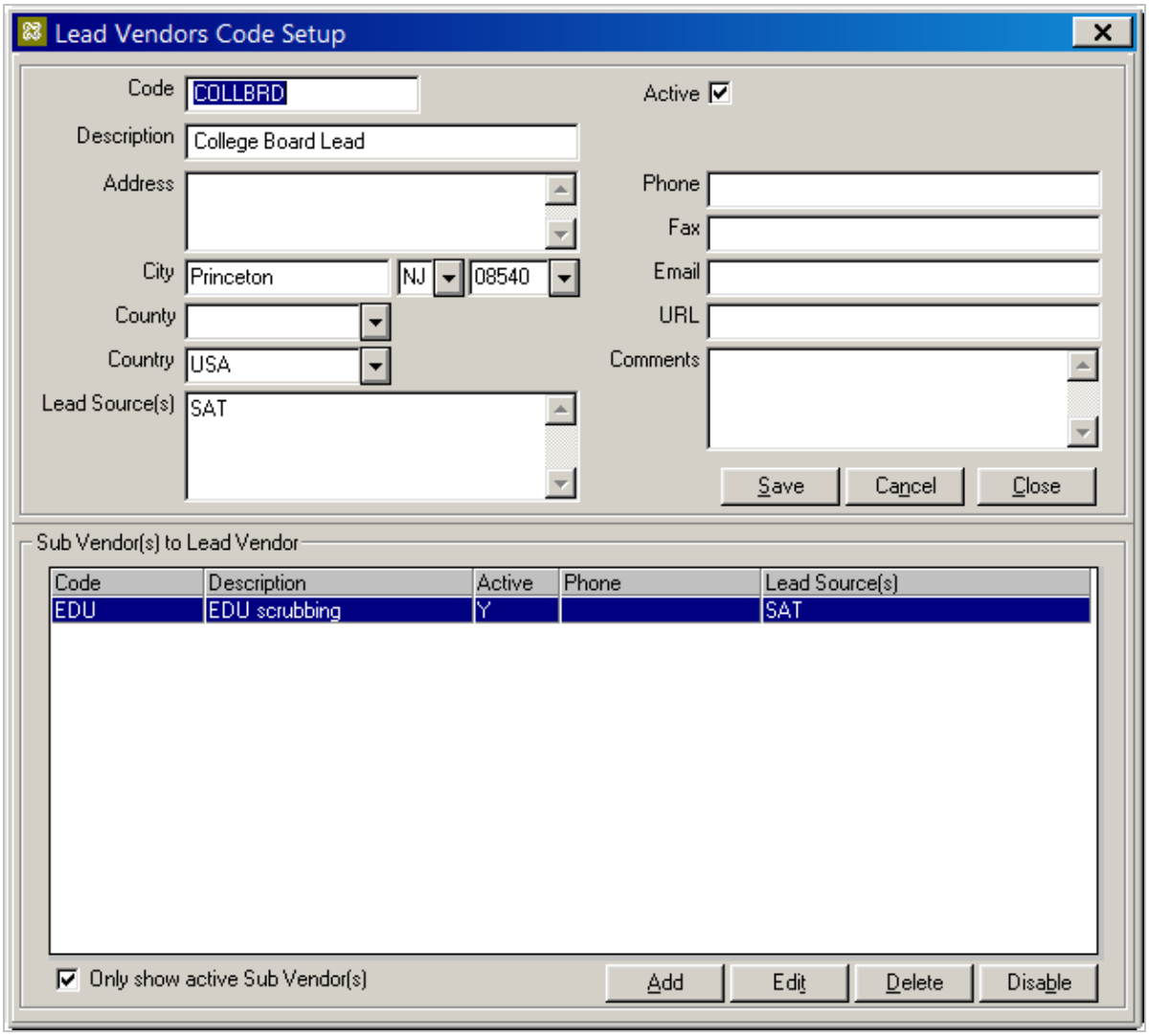
Note: Each vendor is associated with a lead source.

To add or edit a list of lead vendor codes:

1. Navigate to **Lists** > **Admissions**. The Setup - Admissions Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Lead Vendors**.



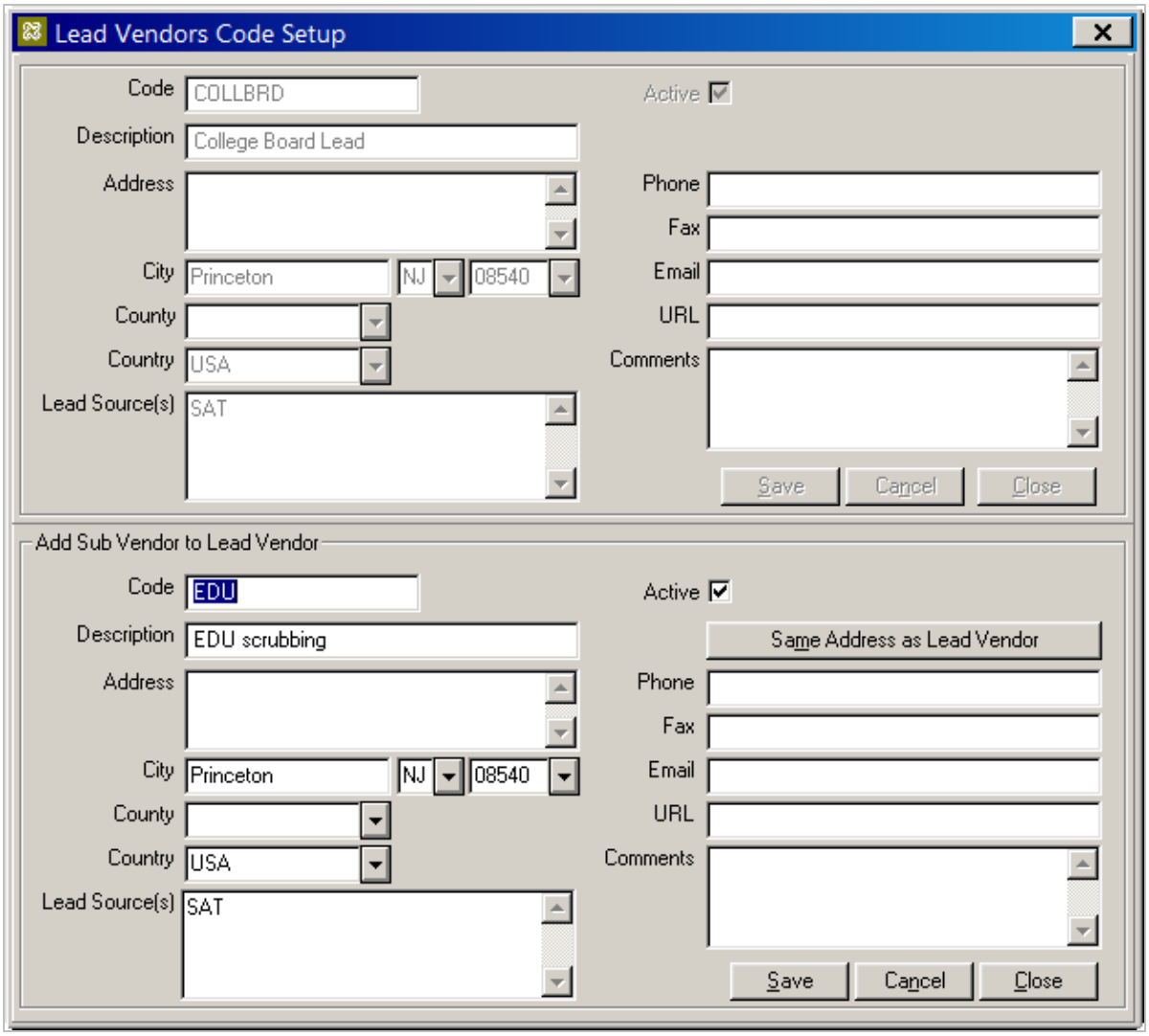
3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Lead Vendors Code Setup form is displayed.



6. Specify a unique **Code**.
7. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
8. Enter a **Description**.
9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

To add or edit sub vendors:

1. In the 'Sub Vendor(s) to lead Vendor' section of the Lead Vendors Code Setup form, select **Only show Active Sub Vendors(s)** to filter the list of sub vendors.
2. Click **Add**, or select a record and click **Edit**.



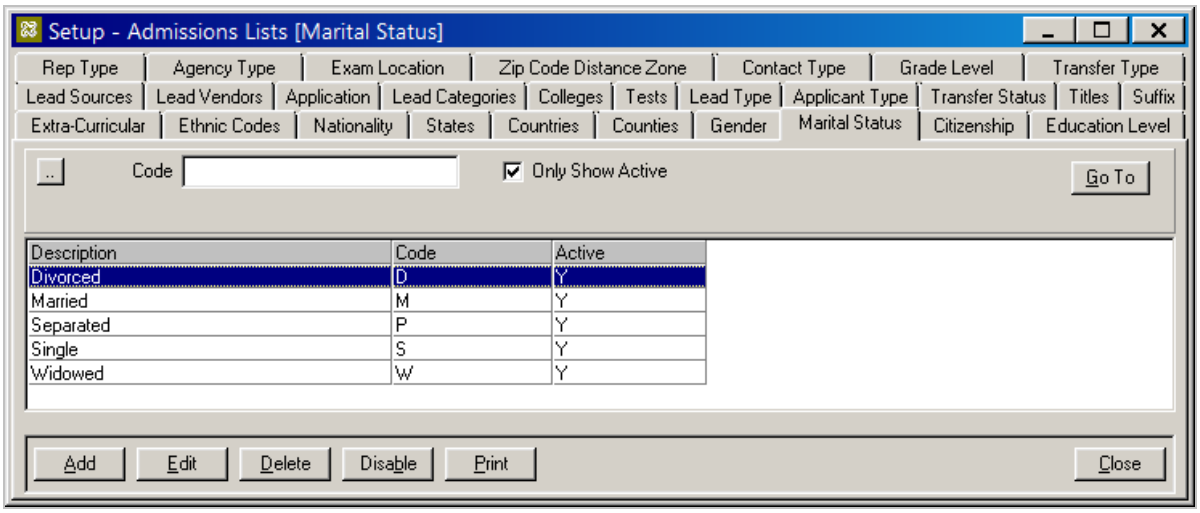
3. Specify a unique **Code**.
4. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
5. Enter a **Description**.
6. Specify the address and contact information as appropriate or click **Same Address as Lead Vendor**.
7. Enter any comments in the **Comment** field.
8. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Admissions Lists [Marital Status]

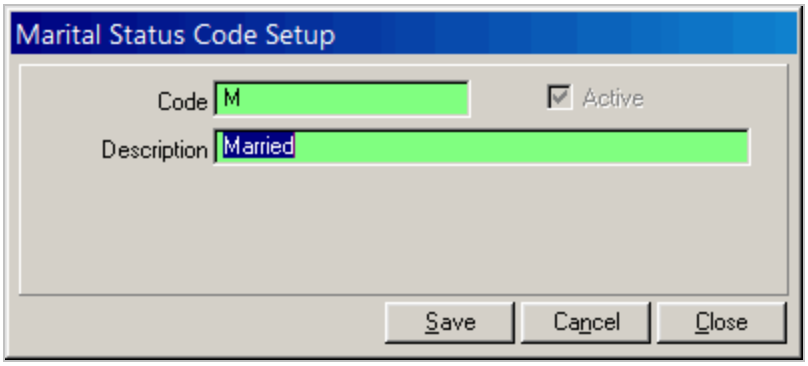
The marital status list contains the marital statuses used by your institution. You can set up codes with which your staff is familiar. The list should reflect the categories used by the Department of Education Financial Aid programs.

To add or edit a list of marital status codes:

1. Navigate to **Lists** > **Admissions**. The Setup - Admissions Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Marital Status**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Marital Code Setup form is displayed.



6. Specify a unique **Code**.
7. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
8. Enter a **Description**.
9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

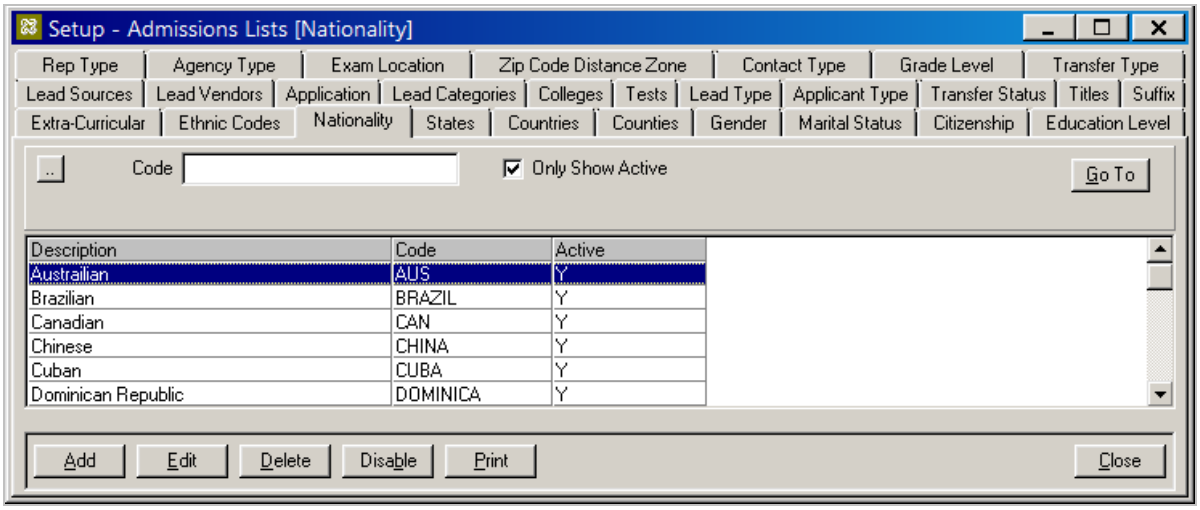
Setup - Admissions Lists [Nationality]

The Nationality list contains entries for the nationalities of your leads and students. As part of a student's record, this list is useful in determining special educational needs such as "English as a Second Language".

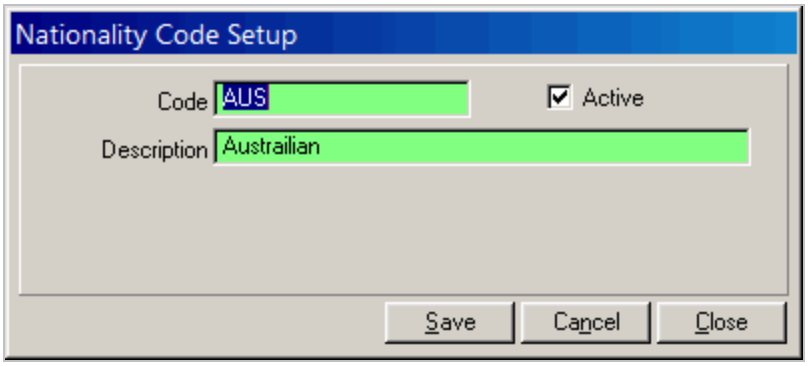
Note: The Nationality code list is not the same as the Countries code list, even though the two lists are likely to have similar entries. For instance, a person whose address may include a country called Australia, might have a nationality code referring to the person as Australian. The Nationality code is also not the same as the Citizenship code, which is used for determining financial aid eligibility.

To add or edit a list of nationality codes:

1. Navigate to **Lists** > **Admissions**. The Setup - Admissions Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Nationality**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Nationality Code Setup form is displayed.



6. Specify a unique **Code**.

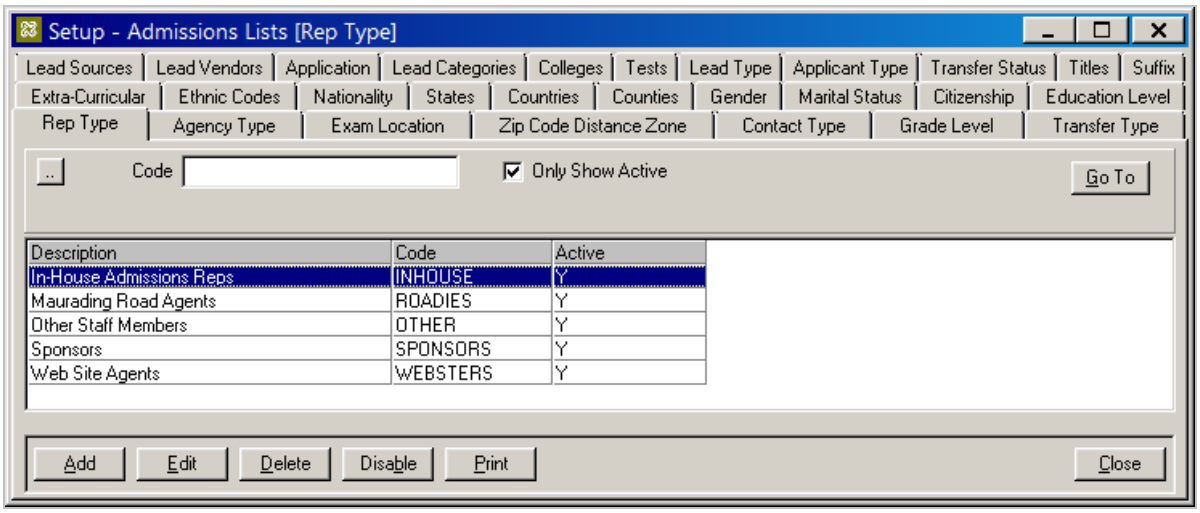
7. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
8. Enter a **Description**.
9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Admissions Lists [Rep Type]

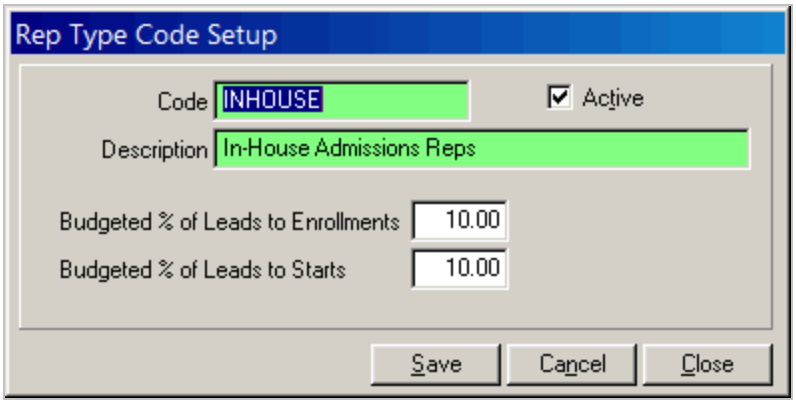
The Rep Type codes are assigned to staff members in the Admissions Rep group. With this code, admissions representatives can be grouped in departments for reporting purposes. See Setup > Staff > Staff Members and Setup > Staff > Staff Groups.

To add or edit a list of admissions rep type codes:

1. Navigate to **Lists** > **Admissions**. The Setup - Admissions Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Rep Type**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Rep Type Code Setup form is displayed.



6. Specify a unique **Code**.
7. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
8. Enter a **Description**.

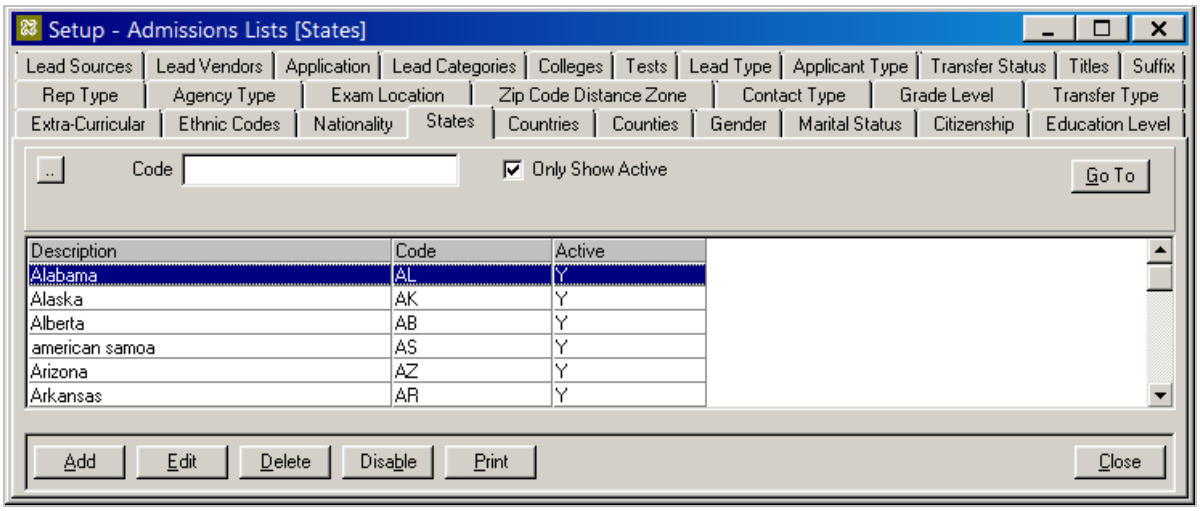
9. Specify the **Budgeted % of Leads to Enrollments**. This value is used on the Executive Summary Report.
10. Specify the **Budgeted % of Leads to Starts**. This value is used on the Executive Summary Report.
11. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Admissions Lists [States]

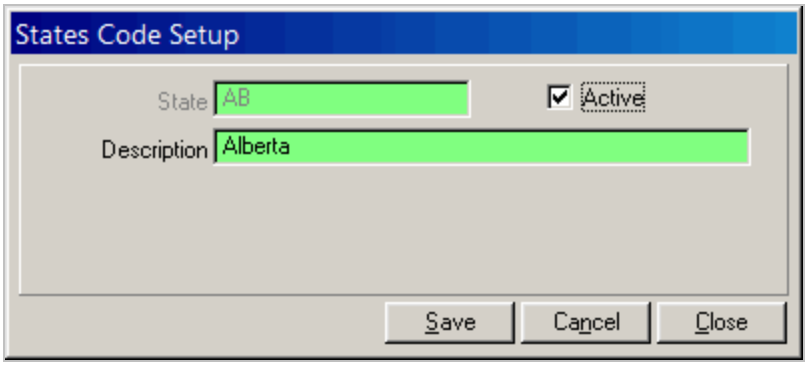
The States list is used for the selection and validation of state postal codes when entering address records. A standard list of states is provided when CampusNexus Student is installed. You can add to the list if you require additional codes such as Canadian provinces and foreign postal codes.

To add or edit a list of state codes:

1. Navigate to **Lists** > **Admissions**. The Setup - Admissions Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **States**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The State Code Setup form is displayed.



6. Specify a unique **Code**.
7. Select or clear the **Active** check box to designate the record as active or inactive, respectively.

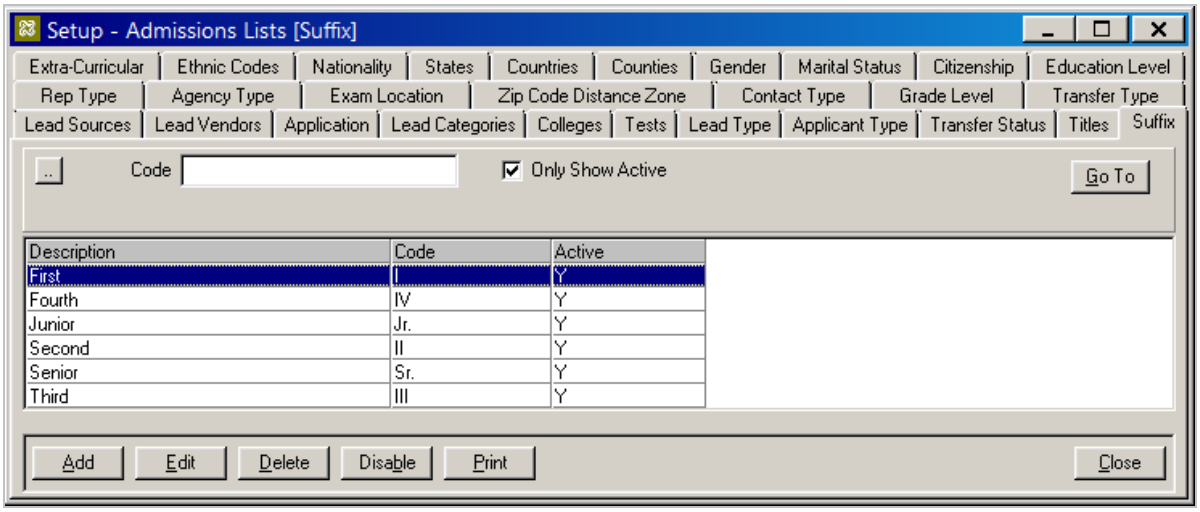
8. Enter a **Description**.
9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Admissions Lists [Suffix]

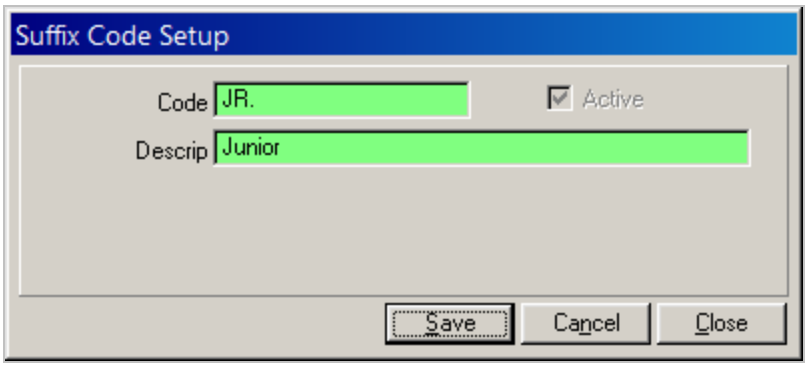
The Suffix list is used for the selection of suffixes, such as Senior or Second (II), when entering name records.

To add or edit a list of state codes:

1. Navigate to **Lists** > **Admissions**. The Setup - Admissions Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Suffix**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Suffix Code Setup form is displayed.



6. Specify a unique **Code**.
7. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
8. Enter a **Description**.
9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Admissions Lists [Tests]

The Tests list defines codes for tests. Entrance tests are used to qualify students for enrollment in your institution. Test codes are entered in the lead record with resulting test scores.

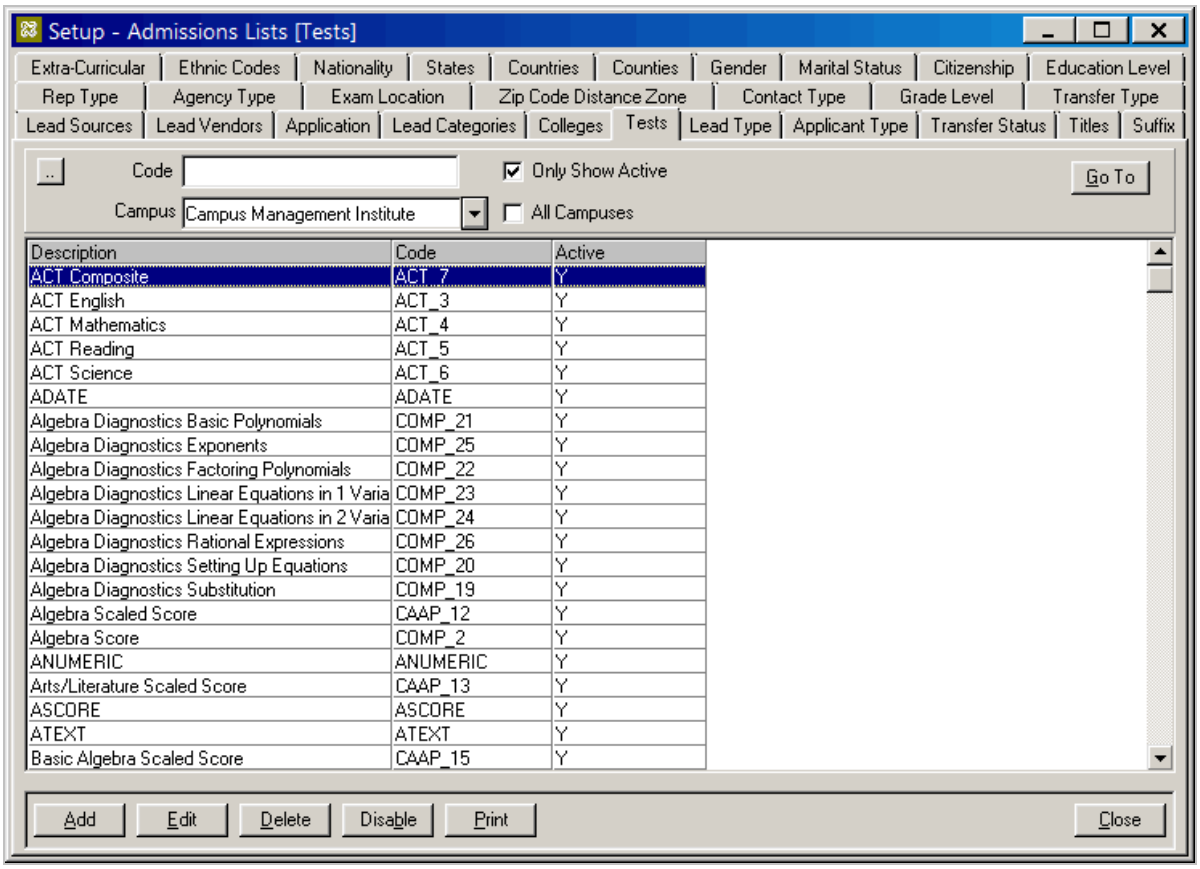
Schools have flexibility when setting up entrance tests to accommodate some of the more complicated tests that require sub-scores or other information. For example, when creating a single test for SAT, verbal, reading, and essay information can be set up and stored as sub-scores.

The tests can be configured in a hierarchical order, such that any given test can have any number and/or levels of sub-tests or supporting information. Remedial courses can be configured for the tests when a student does meet the minimum criteria established for the test and/or sub-score. CampusNexus Student assigns the configured remedial courses to a student schedule if the student's test score is not satisfactory for that Program / Program Version / Agency.

Multiple sub-tests can be assigned to a main test, and multiple lower level sub-tests can be assigned any sub-test. Each can be associated with the applicable campus. All Tests can be assigned for each enrollment.

To add or edit a list of test codes:

1. Navigate to **Lists** > **Admissions**. The Setup - Admissions Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Tests**.

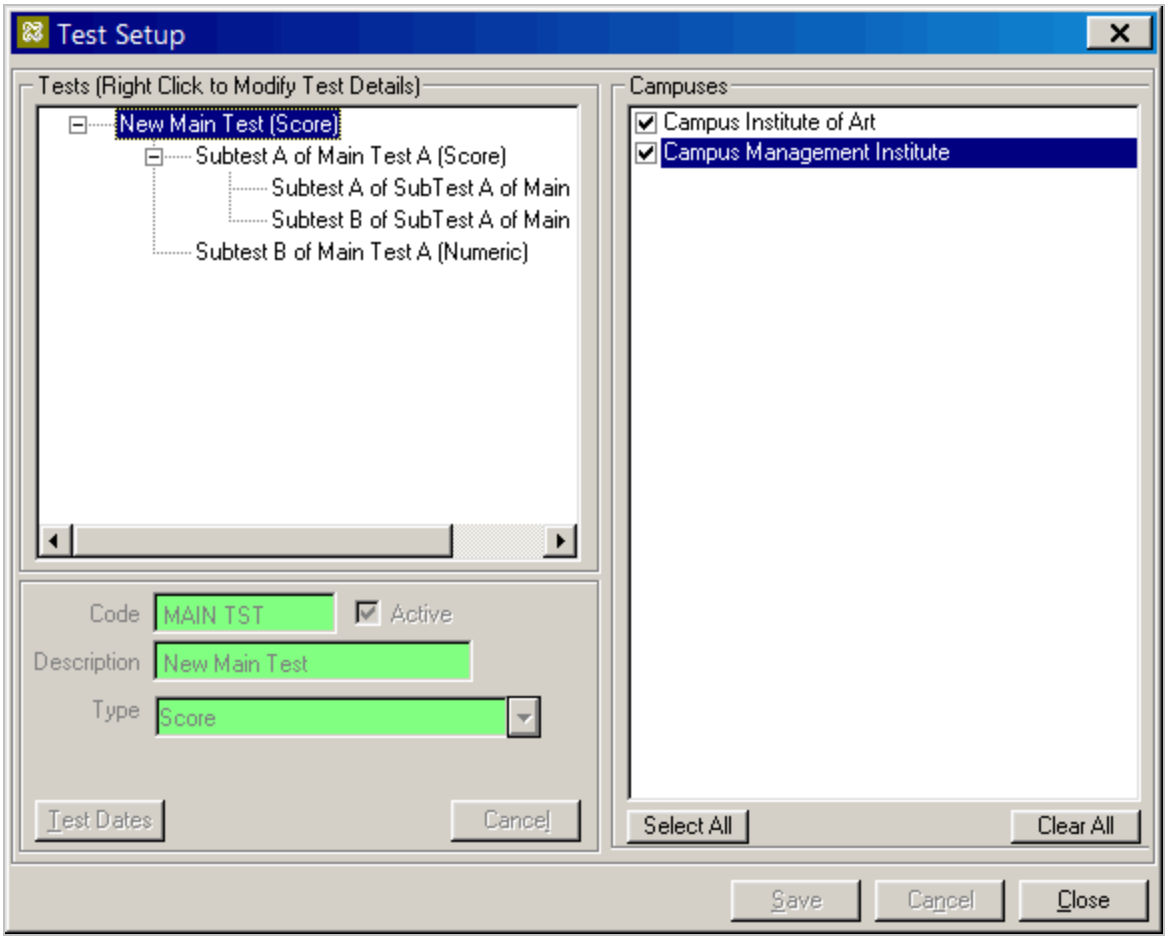


Note: When you click the **Print** button, the Code, Description, Campus Group, and Active flag for each main test on the Tests Listing report are listed. (The sub-fields of the main tests *are not* listed).

3. Click

... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.

4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
6. Click **Add**, or select a record and click **Edit**. The Test Setup form is displayed.



7. Specify a unique **Code**.
8. Enter a **Description**.
9. Select the **Campus (es)** that will use the entrance test.
10. Select a test **Type**. The options are:

    - Score
    - Date
    - Numeric
    - Text

    Different fields are enabled depending on the selected test type.

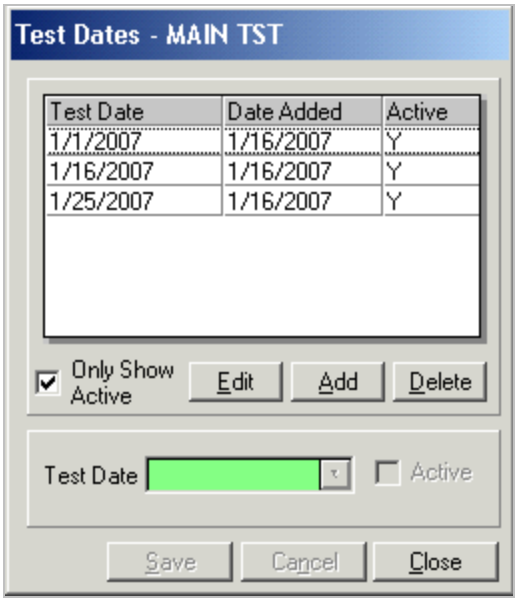
To add, edit, or delete test details within a hierarchy:

1. Right-click in the Tests area. Select the option to **Add**, **Edit**, or **Delete** test details.
2. Select the **Campus**, **Code**, **Description**, and **Type** for a new test.
3. Click **Save**. A confirmation message is displayed. Click **OK**.
4. The new test is displayed in the hierarchical list.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

To specify test dates:

The Test Dates button is enabled only for main tests.

1. Click the **Test Dates** button. The Test Dates form is displayed.



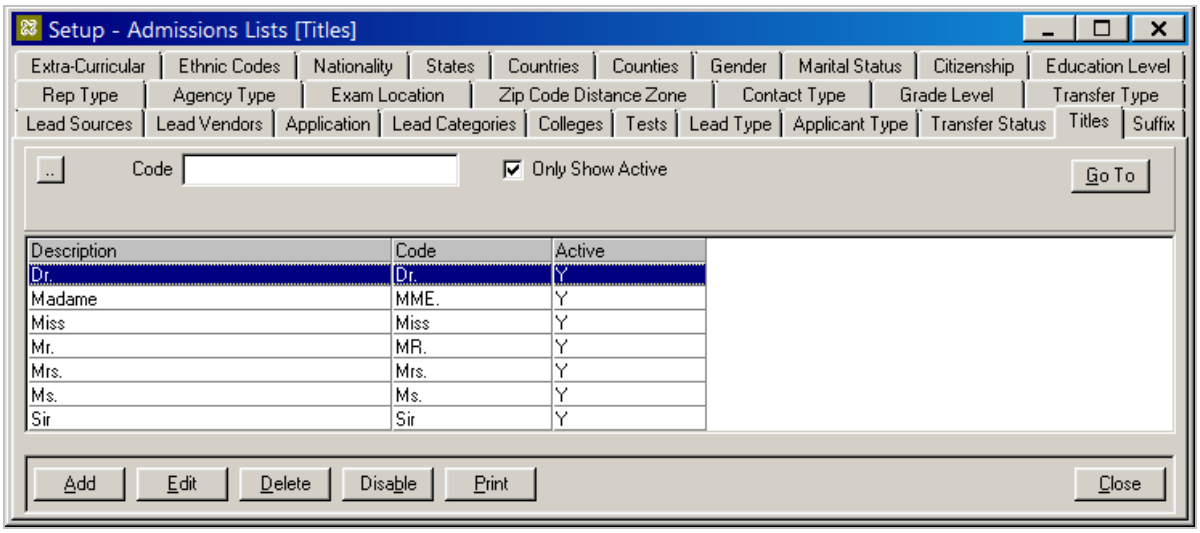
2. Click **Add** to add new test dates.
3. Select a test date and click **Edit** to modify the date, or click **Delete** to remove a test date.
4. Click in the **Test Date** field and select the test date from the calendar.
5. Click **Save**. . The selected Test Date is added to the test date list.
6. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
7. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Admissions Lists [Titles]

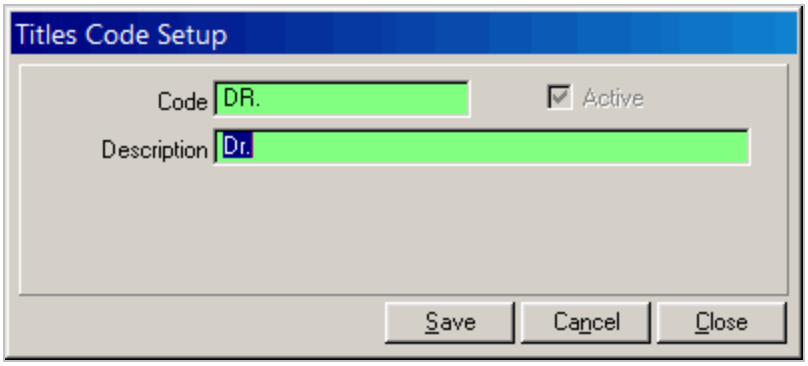
The Titles list contains the common titles that may be used in your lead, student, and staff records. The titles are frequently used as name prefixes on written correspondence with these individuals.

To add or edit a list of title codes:

1. Navigate to **Lists** > **Admissions**. The Setup - Admissions Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Titles**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Title Code Setup form is displayed.



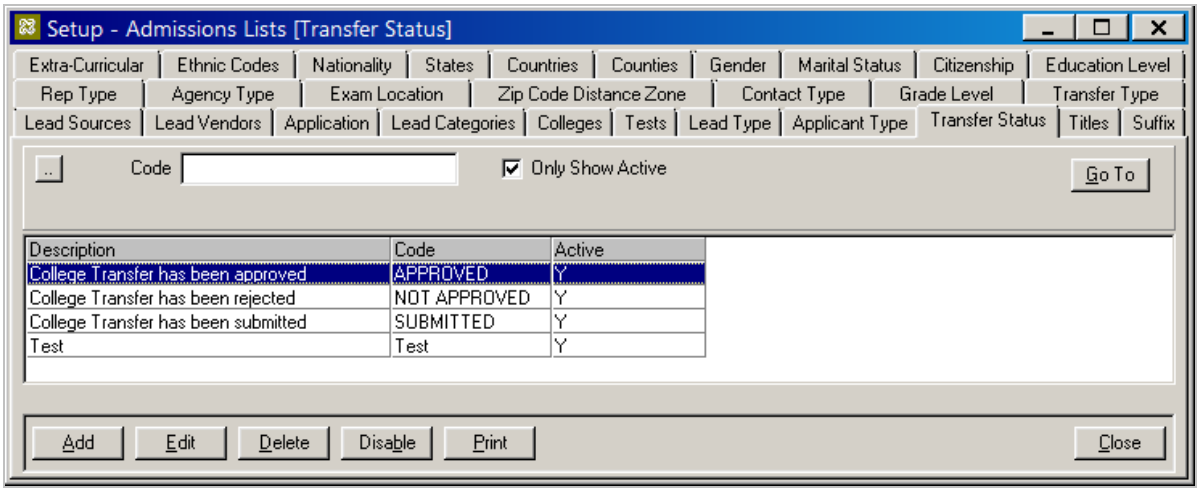
6. Specify a unique **Code**.
7. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
8. Enter a **Description**.
9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Admissions Lists [Transfer Status]

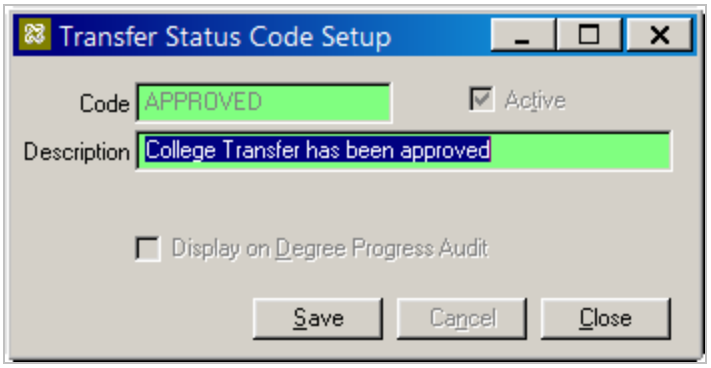
The Transfer Status list defines codes for the statuses that can be assigned for a college transfer.

To add or edit a list of transfer status codes:

1. Navigate to **Lists** > **Admissions**. The Setup - Admissions Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Transfer Status**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Transfer Status Code Setup form is displayed.



6. Specify a unique **Code**.
7. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
8. Enter a **Description**.
9. Select the check box **Display on Degree Progress Audit** if the transfer status and information should appear on

the Degree Progress Audit (including the Hypothetical Degree Progress Audit).

Note: If the status code is APPROVED, the check box is disabled because transfer credits in an APPROVED status are automatically displayed on the Degree Progress Audit.

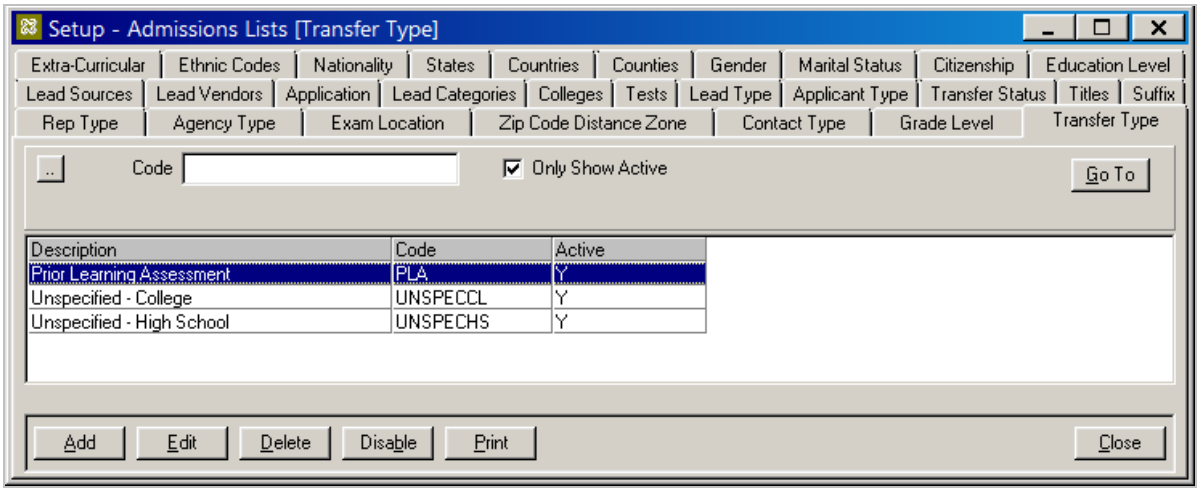
10. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Admissions Lists [Transfer Type]

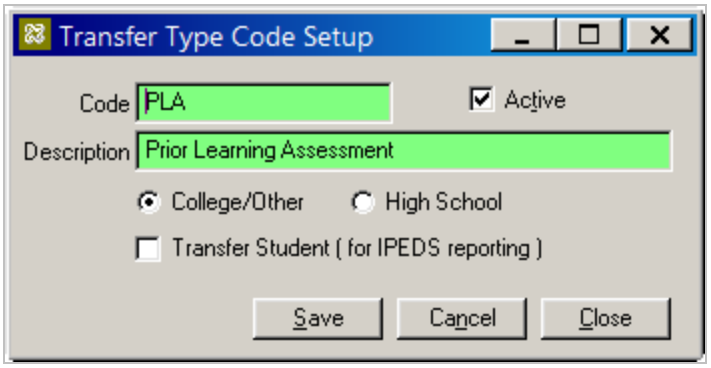
The Transfer Type list contains codes to identify the various transfer types that can be assigned when posting transfer credits.

To add or edit a list of transfer type codes:

1. Navigate to **Lists** > **Admissions**. The Setup - Admissions Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Transfer Type**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Transfer Type Code Setup form is displayed.



6. Specify a unique **Code**.
7. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
8. Enter a **Description**.
9. Select **College/Other** or **High School** to indicate the institution and course list to be used when entering transfer

credits for a student.

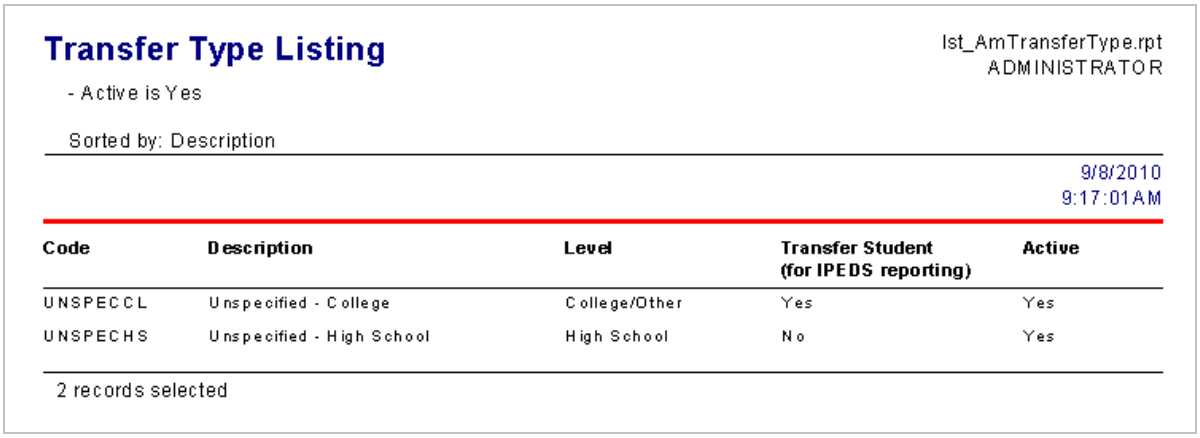
10. If applicable, select **Transfer Student (for IPEDS reporting)** to designate that the transfer type is not to affect a student's transfer status in IPEDS reporting.
11. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

To print a list of transfer types:

1. Click **Print** on the Setup - Admissions Lists [Transfer Type] tab. The Report Selection form is displayed.
2. Select appropriate options on the Selection tab.

   Select or clear **Yes** or **No** next to the Active label. If you select Yes, active records are listed on the report. If you select No, inactive records are listed. If you select both, active and inactive records are listed.

   If no records match the selection criteria, the message *"No records selected for the report"* is displayed.
3. Click **Preview**. The report is assembled and displayed in the Report Viewer. The report contains the Code and Description for each Housing Date configured.



Transfer Type Listing

lst_AmTransferType.rpt
ADMINISTRATOR

- Active is Yes

Sorted by: Description

9/8/2010
9:17:01AM

Code	Description	Level	Transfer Student (for IPEDS reporting)	Active
UNSPECCL	Unspecified - College	College/Other	Yes	Yes
UNSPECHS	Unspecified - High School	High School	No	Yes

2 records selected

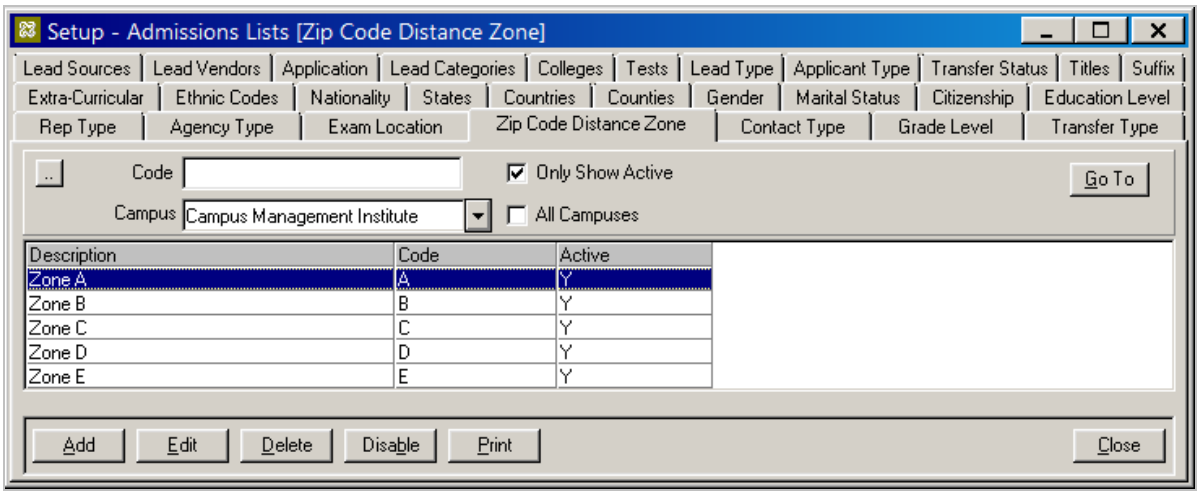
4. Use the available Report Viewer Controls as needed to process the Transfer Type Listing.

Setup - Admissions Lists [ZIP Code Distance Zone]

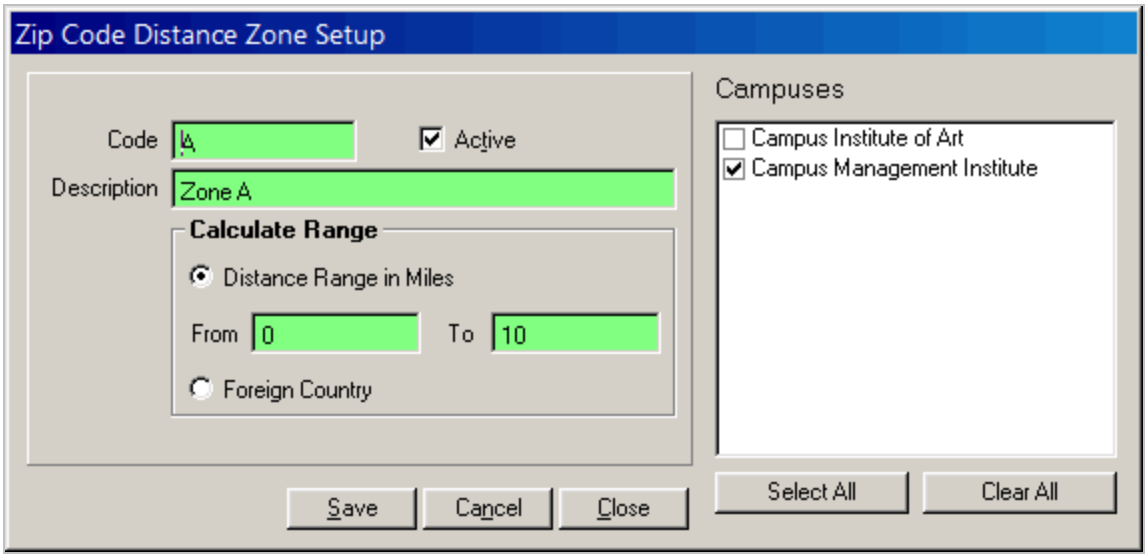
The ZIP Code Distance Zone list provides a means of assigning zones to students. The zones are determined by calculating the direct line distance between the ZIP code of each campus and the ZIP code of the student's address. An option is provided to assign a zone for any student from a foreign country (outside of the ZIP code system).

To add or edit a list of ZIP code distance zone codes:

1. Navigate to **Lists** > **Admissions**. The Setup - Admissions Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **ZIP Code Distance Zone**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
6. Click **Add**, or select a record and click **Edit**. The ZIP Code Distance Zone Code Setup form is displayed.



7. Specify a unique **Code**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Enter a **Description**.
10. In the Calculate Range area, select whether the zone is determined by distance or by country.
    - If the zone is based on distance, select **Distance Range in Miles** and specify the **From** and **To** range.
    - If the zone is based on another country, select **Foreign Country**.
11. Select one or more **Campuses**.
12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Lists > Financial Aid

When you navigate to Lists > Financial Aid, the Financial Aid Lists form is displayed. Add, edit, delete, disable, and print Financial Aid lists from the following tabs:

- Academic Years
- Budgets
- Disbursement Approval Criteria
- Disbursement Schedules
- FA G/L Funds
- Fund Source
- Lenders
- Packaging Methods
- Packaging Statuses
- Packaging Status Promotion
- Programs

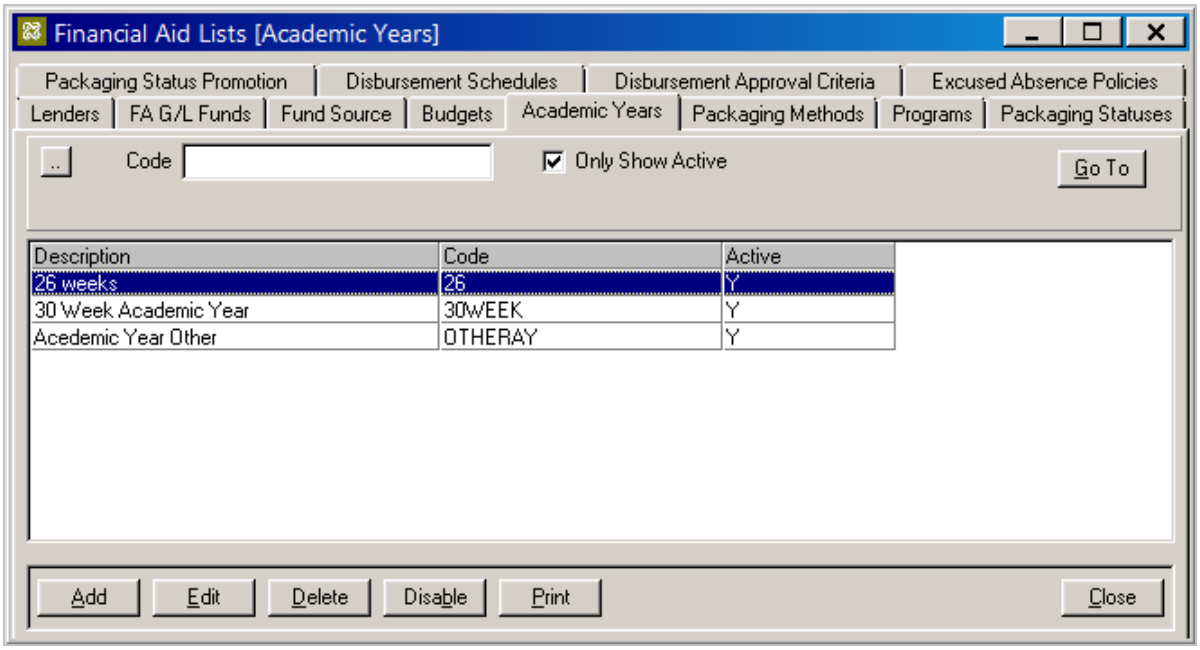
See Maintaining Lists for instructions on adding, editing, deleting, disabling, enabling, and printing lists.

Financial Aid Lists [Academic Years]

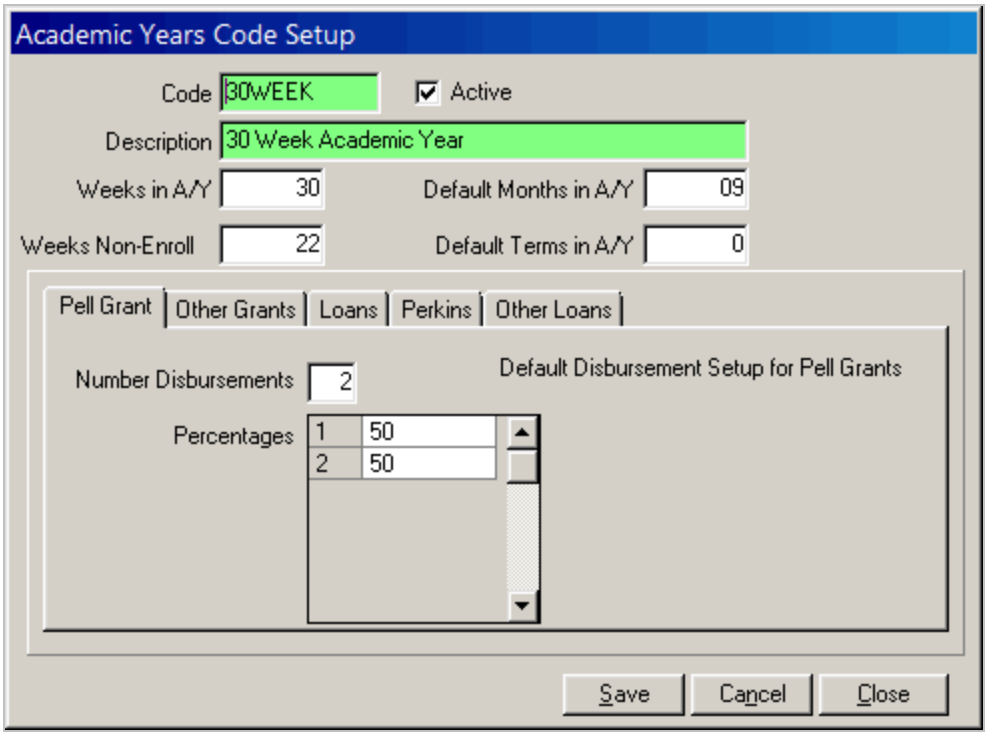
The Financial Aid Lists [Academic Years] form is used to describe the characteristics of your institution's academic years. The academic years you define here are used when setting up programs in financial aid lists. Typically, an institution would have only a few variations of the academic year (AY) and possibly only one.

To add or edit a list of academic years codes:

1. Navigate to **Lists** > **Financial Aid**. The Financial Aid Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Academic Years**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Academic Years Code Setup form is displayed.



6. Specify appropriate options. See Field Descriptions.
7. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Field Descriptions

Field	Description
Code	Specify a unique **Code**.
Description	Enter a **Description**. **Note**: The description should indicate the number of weeks, months, or clock hours included in the academic year if your institution has more than one type of academic year.
Weeks in A/Y	Specify the number of weeks in the academic year. The total of Weeks in A/Y and Weeks Non-Enroll should add up to 52. A Higher Education Reconciliation Act (HERA) provision reduces the minimum 30 weeks of instructional time for programs measured in clock hours to 26 weeks. The minimum 30 weeks academic year definition remains in effect for term and non-term credit hour programs.
Weeks Non-Enroll	Specify the number of weeks in the academic year that the student is not expected to be in attendance. The total of Weeks in A/Y and Weeks Non-Enroll should add up to 52. This number is used (combined with Weeks in A/Y) to estimate the time between the start of one academic year and the start of the next academic year.

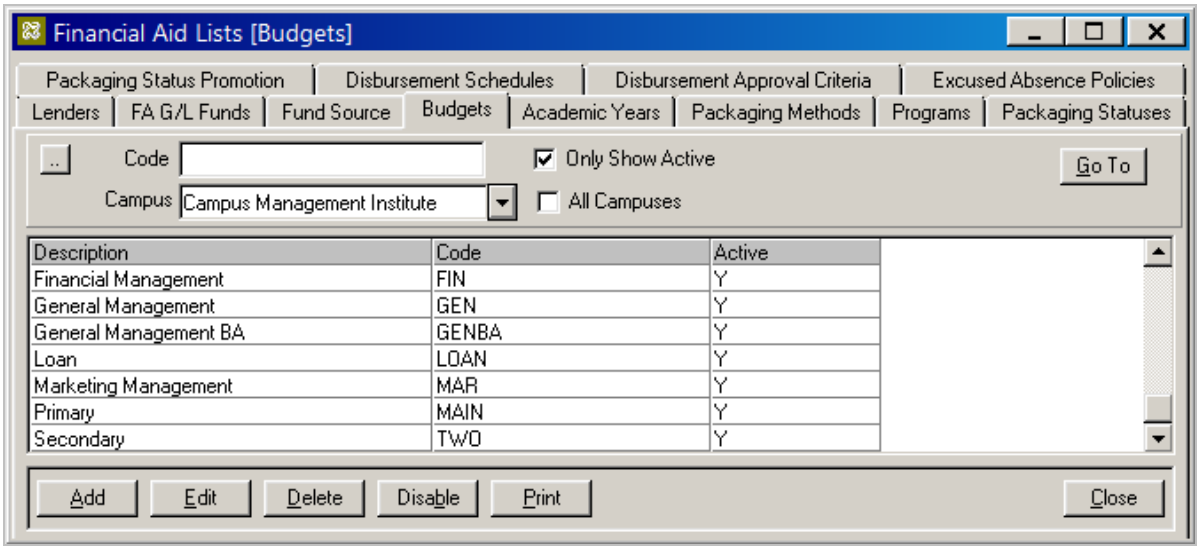
Field	Description
Default Months in A/Y	*Optional*: Specify the default number of months in the academic year. CampusNexus Student calculates the number of months in an academic year using the formula: (Default weeks in AY / 4.33). The number of months in this field will override the calculation. If this new field is greater than 0, CampusNexus Student uses this value as the months in an Academic Year. If this field is set to 0, CampusNexus Student uses the existing logic and calculates the months in the AY.
FA Fund Source Tabs	Each fund source tab represents a class of fund sources, not the specific fund sources used by your institution. The fields on each fund tab are similar.
Number of Disbursements	Specify the default number of disbursements you expect to make for this academic year. The valid range is 1 to 15. The maximum number of disbursements allowed by financial aid type is as follows: • Pell Grant - 15 • Other Grants - 6 • Loans - 20 • Perkins - 6 • Other Loans - 6
Percentages	When you enter the default number of disbursements, CampusNexus Student calculates the percentage of the financial aid amount in each disbursement. Percentages can be entered with two decimal places. For example, a fund source with three disbursements can be set up as 33.34%, 33.33%, and 33.33%. If the number of disbursements is one or two, decimals are not allowed. If the number of disbursements is three or more, decimals are allowed. All percentages entered for a financial aid type must add up to 100.00.

Financial Aid Lists [Budgets]

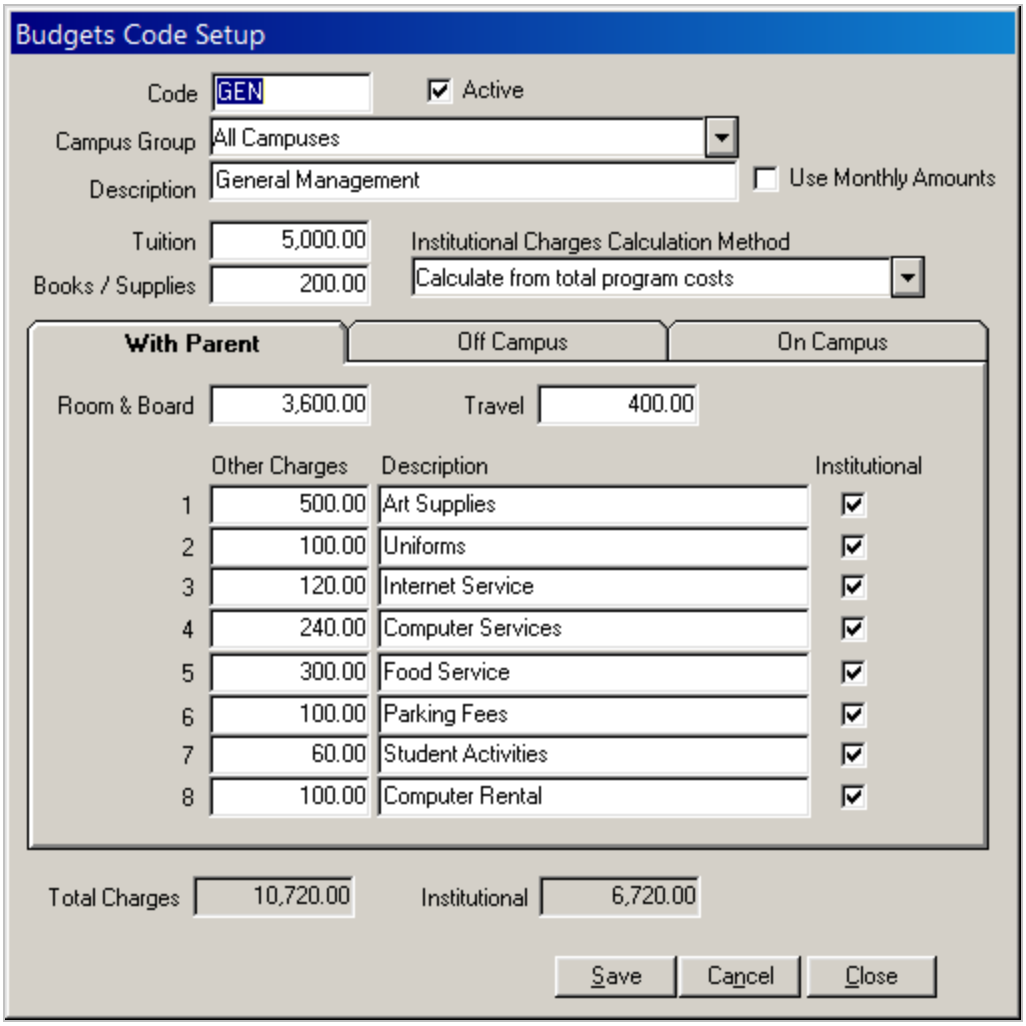
Use the Financial Aid Lists [Budgets] form to set up budgets for student financial aid packaging. These budgets are also known as the Cost of Attendance (COA) budget. Budgets are normally set up to cover an academic year. They are the basis for financial aid grants and loans which are also based on academic years. Budgets can vary based on the dependency model that fits the student. You need to select a budget from a list of available budgets when packaging a student. Authorized users can configure new budgets or change existing budgets.

To add or edit a list of budget codes:

1. Navigate to **Lists** > **Financial Aid**. The Financial Aid Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Budgets**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
6. Click **Add**, or select a record and click **Edit**. The Budgets Code Setup form is displayed.



Institutions can set up budgets for students according to housing status. A budget shares common tuition, books and supplies components, but the room and board, travel, and personal expense components can be calculated separately depending on student's housing status.

CampusNexus Student can associate a budget with a program version. Costs for "Tuition" and "Books / Supplies" are specified in the Programs Code Setup form (Lists > Financial Aid > Programs).

7. Specify a unique **Code**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Select a **Campus Group** to which this budget applies.
10. Enter a **Description**.
11. Select the **Use Monthly Amounts** check box to configure a budget that uses monthly amounts for budget allowances rather than literal values.
12. The **Institutional Charges Calculation Method** determines how the institutional charges portion of the budget is calculated when the budget is assigned to an academic year for a student. Select one of the following options:

a. **Calculate from Enrollment Fees**

   This option gathers the institutional costs for the budget from the student's records in the Program Fees (AdFees) table. This table defines the billing schedule for a student. The records gathered from this table depend on the defined billing method for the student's program.

   - If billing is based on full program, the full program costs are gathered from the Fees table for the student and used as the institutional costs for the budget.
   - If billing is based on academic year, the institutional costs for the budget are calculated by gathering the records in the Fees table for the academic year being packaged.
   - If billing is based on term, and a rate schedule is not used, the charge records found in the Fees table are multiplied by the number of billing cycles that occur in an academic year (AdProgramVersion.TermsInAY) to calculate the institutional costs for the budget.
   - If billing is based on course, or based on term using a rate schedule, the Calculate from AdFees option applies.

b. **Calculate from total program costs**

   This option calculates the institutional costs of the budget as follows:

   The total tuition cost of the program (AdProgramVersion.TotalTuitionCost) is divided by the total number of weeks in the program (AdProgramVersion.TotalWeeks) to arrive at a cost per week. The cost per week is then multiplied by the number of weeks in the academic year being packaged (FaStudentAY.WeeksInAY - FaStudentAY.WeeksNonEnroll) to arrive at the tuition cost for the budget.

   The books and other costs are calculated the same way. The total books cost is stored in AdProgramVersion.TotalBooksSuppliesCost and the total other cost is stored in AdProgramVersion.TotalOtherCost.

c. **Use amounts entered here**

   This option uses the institutional costs that are entered in the Budget Code Setup form.

13. Specify amounts for **Tuition**, **Books / Supplies**, **Room & Board**, **Travel**, and **Other Charges**.

    Tuition and Books / Supplies are institutional charges by default.

    For Other Charges, select the **Institutional** check box if the charge is to be included in that category when packaging student financial aid.

    Note: The U.S. Department of Education's definition of an institutional charge is: *"In general, an **institutional charge** is a charge for educational purposes by a institution for which the institution requires direct payment. ...Tuition charges are always institutional charges, but everything else (fees, room and board charges, books and supply costs, etc.) is subject to Departmental guidance and state or accrediting agency refund rules."* --The Federal Student Financial Aid Handbook 1998-99, page 3-87.

14. The **Total Charges** and **Institutional** totals are read-only fields.

15. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

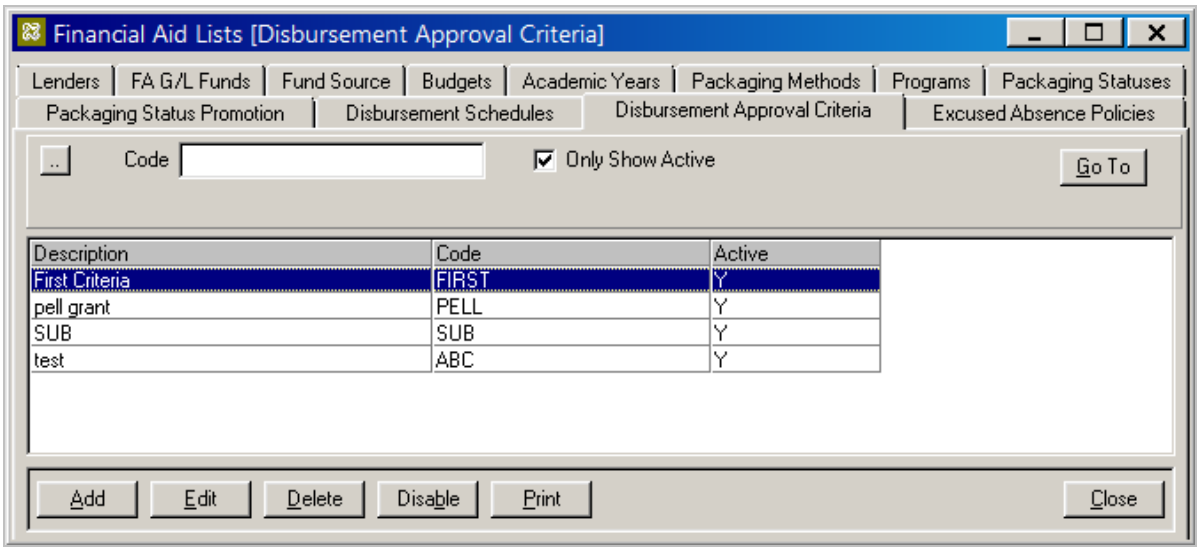
Financial Aid Lists [Disbursement Approval Criteria]

Note: Please access Regulatory Help for the latest content about FAFSA, ISIR, and COD processing.

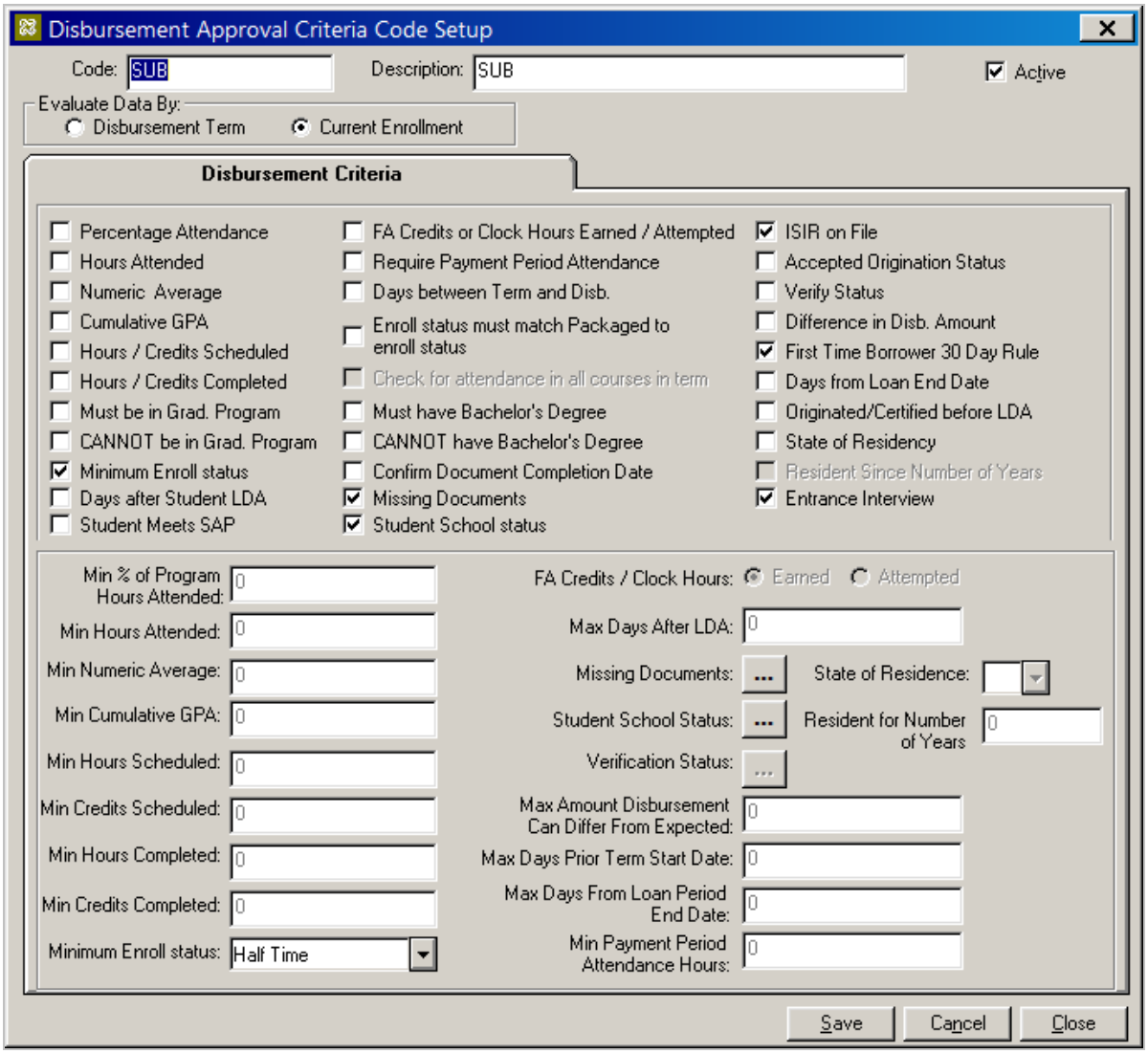
Use the Financial Aid Lists [Disbursement Approval Criteria] form to create disbursement approval criteria (DAC) sets. Disbursements are batch processes. During processing, CampusNexus Student validates that the student has met the criteria for disbursement. When one or more requirements are not met, the disbursement fails, and the reasons for the failure are displayed in Approve Disbursements to Pay form.

To add or edit a list of disbursement approval criteria codes:

1. Navigate to **Lists** > **Financial Aid**. The Financial Aid Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Disbursement Approval Criteria**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Disbursement Approval Criteria Code Setup form is displayed.



Notes:

- The criteria selection is independent of a specific campus. See Fund Source to associate the disbursement approval criteria with a fund source for a campus.
- The Disbursement Approval Criteria Code Setup form provides ... buttons to select multiple values for **Missing Documents**, **Student School Status**, and **Verification Status**.

6. Specify a unique **Code**.
7. Enter a **Description**.
8. Select one of the following options:
   - Click **Disb. Term** to evaluate by the term on the disbursement.
   - Click **Enrollment** to evaluate by the current enrollment data. The **Check for attendance in all courses in**

term check box is disabled when selecting this option.

9. Choose the approval criteria by selecting appropriate check boxes.

   Note: The criteria 'Confirm Document Completion Date' through 'Days from Loan End Date' do not rely on a term for evaluation.

   Field Descriptions

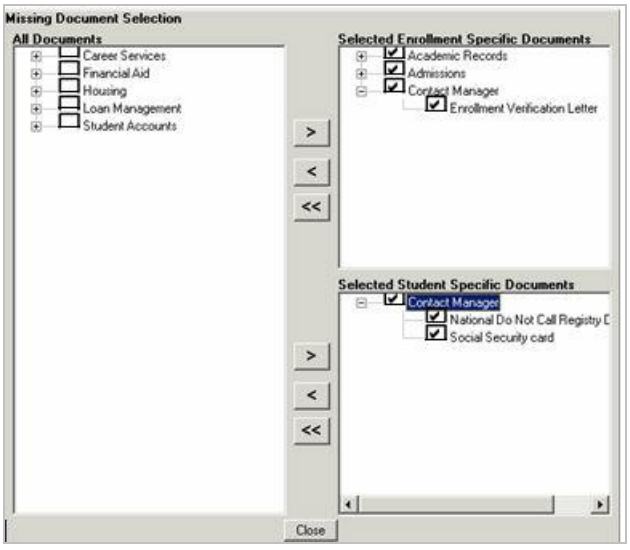
Field	Description
Percentage Attendance	The percentage of attendance achieved should be greater than or equal to the minimum value defined in the criteria.
Hours Attended	The number of hours attended should be greater than or equal to the minimum value defined in the criteria.
Numeric Average	The numeric average achieved should be greater than or equal to the minimum value defined in the criteria.
Cumulative GPA	The cumulative GPA achieved should be greater than or equal to the minimum value defined in the criteria.
Hours / Credits Scheduled	The number of hours/credits scheduled, plus attempted, should be greater than or equal to the minimum value defined in the criteria. • If the student's program version is set up as a clock hour program (AdprogramVersion.ClockCredit=H), this criteria will be evaluated based on enrollment status hours. For a disbursement to pass this criteria, the sum of the enrollment status hours for all courses the student has attempted, plus the enrollment status hours for courses the student is currently scheduled for, must be greater than or equal to the number specified for this criteria. Hours are considered attempted if the student receives a letter grade that has the "Include in Credits Attempted" check box selected in the Letter Grade setup (Lists > Academic Records > Grade Scale > Grades). • If the student's program version is set up as a credit based program (AdprogramVersion.ClockCredit = 'C'), this criteria will be evaluated based on enrollment status credits. The sum of the enrollment status credits for all courses that the student has attempted, plus the enrollment status credits for courses the student is currently scheduled for, must be greater than or equal to the number specified for this criteria.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Hours / Credits Completed</td><td>The number of hours completed should be greater than or equal to the minimum value defined in the criteria.
If the student's program version is set up as a clock hour program (AdprogramVersion.ClockCredit='H'), this criteria will be evaluated based on enrollment status clock hours. For a disbursement to pass this criteria, the sum of the enrollment status hours for all courses the student has taken and received a letter grade that has the "Include in Credits Earned" check box selected, must be greater than or equal to the number specified for this criteria.
If the student's program version is set up as a credit based program (AdprogramVersion.ClockCredit = 'C'), this criteria will be evaluated based on enrollment status credits. The sum of the enrollment status credits for all courses the student has taken and received a letter grade that has the "Include in Credits Earned?" check box selected, must be greater than or equal to the number specified for this criteria.
If a student is enrolled as a non-term or clock hour student and has a stub loan period (see Packaging for Overlapping Loans), CampusNexus Student does not use completed credits/hours and weeks as criteria when approving direct loan disbursements associated with the stub loan period or disbursements associated with the first payment period of the second loan period. This means disbursements for direct loans associated with a stub loan period or disbursements associated with the first payment period of the second loan period can be automatically approved regardless of how many clock/credit hours or weeks of instructional time have been completed (provided that all other criteria have passed validation). Disbursements associated with the second payment period of the second loan period or later are still subject to the normal BBAY3 rules in that the student must complete credits/hours and weeks of instruction time before being eligible to receive the disbursements. See Volume 3, Chapter 1 of FSA Handbook (Topic: Direct Loan periods when student transfers to a new school).</td></tr>
<tr><td>Must be in Grad. Program</td><td>The Graduate Program criterion requires a student to be a graduate. Select Must be in Grad. Program or CANNOT be in Grad. Program, but not both. The graduate level flag should be enabled for the degree program when selecting this option.</td></tr>
<tr><td>CANNOT be in Grad. Program</td><td>The Graduate Program criterion requires that a student is not a graduate. Select Must be in Grad. Program or CANNOT be in Grad. Program, but not both. The graduate level flag should not be enabled for the degree program when selecting this option.</td></tr>
<tr><td>Minimum Enroll Status</td><td>Select an option from the Minimum Enroll Status field.<table><tr><th>Description</th><th>Code</th></tr><tr><td>3/4 Time</td><td>Q</td></tr><tr><td>Full Time</td><td>F</td></tr><tr><td>Half Time</td><td>H</td></tr><tr><td>Less than half time</td><td>L</td></tr></table></td></tr>
<tr><td>Days after Student LDA</td><td>The number of days between the disbursement date and the student's Last Date of Attendance (LDA) is within a certain number of days defined in the criteria. If a student's LDA is empty or NULL, the criteria will fail.</td></tr>
</table>

Field	Description
Student Meets SAP	The criteria check is performed using the SAP status assigned to the enrollment when the “Evaluate Data by” is set to current enrollment. If the “Evaluate Data by” is set to disbursement term, the check is performed using the payment period/term associated with the disbursement. If no SAP status is found there, the previous payment period/term with an SAP status is used for the evaluation. This is because SAP is typically not run until after a term/payment period has been completed and often not run against every disbursement term/payment period. If SAP has never been run for an enrollment, then the Approve Disbursements to Pay process will NOT perform this check or hold disbursements for this criteria. An SAP status being reported as “Not Calculated” will not produce an exception or hold a disbursement for this criteria.

Field	Description
FA Credits or Clock Hours Earned / Attempted	The number of FA credits or clock hours attempted/earned must be greater than or equal to the minimum threshold value calculated in the evaluation logic. This criteria is only evaluated for student's whose program version has a value specified in the FA Clock to Credit Conversion Rate field. • The total number of Financial Aid credits in the student's program is calculated by dividing the total number of hours in the program by the number specified in the **FA Clock to Credit Conversion Rate**. **Note**: For information regarding the updated clock to credit hour conversion rules effective as of July 1, 2011, see Impact of Clock to Credit Conversion Rate on Disbursement Approval. • Calculate the total # of disbursements in the program by summing the # of disbursements defined for each academic year attached to the program version. The number of disbursements for each academic year are determined by looking up the default # of disbursements defined for the fund source being evaluated on the academic years setup. • Determine the minimum required FA credits for each disbursement number. This is done by dividing the total number of FA credits calculated in Step 1 by the total # of disbursements in the program calculated in Step 2. For example, if there are 100 FA credits in the program and a total of 4 disbursements, then the number of FA credits required for each subsequent disbursement will be incremented by 25. *Example*: Minimum FA credits required ◦ Disb # 1 0 ◦ Disb # 2 25 ◦ Disb # 3 50 ◦ Disb # 4 75 • The criteria will pass if the student has attempted or earned (depending on how the FA credits criteria is set up) a number of FA credits that is greater than or equal to the minimum number of FA credits calculated for that disbursement number. In the example above, if the third disbursement of a loan was being evaluated, the student would have to have earned/attempted at least 50 FA credits for the criteria to pass. • Non-term programs using payment periods can enable this setting with the corresponding radio button set to “FA Credits/Clock Hours: Earned” to allow the “Approve Disbursements to Pay” process to check for prior payment period completion before auto approving a non TIV disbursement that is associated to a payment period. If this setting is not enabled, non TIV disbursements associated to a payment period will not check for prior payment period completion. Note that any TIV fund source associated to a DAC policy will check for prior payment period completion in the “Approve Disbursements to Pay” process regardless of any DAC settings if a disbursement is associated to a TIV payment period.

Field	Description
Require Payment Period Attendance	When this check box is selected, CampusNexus Student requires positive attendance in a payment period as criteria for approving disbursements, and the Min Payment Period Attendance Hours field is enabled. If the criteria entered for Min Payment Period Attendance Hours field is not met, the criteria fails and an exception occurs preventing a disbursement for the student.
Days between Term and Disb.	The number of days between the term start date and the disbursement date has to be less than or equal to a number defined in the criteria. If the amount of days is set to zero on the criteria, the disbursement date and term start date will have to be the same date for the criteria to pass. If the student does not have a term associated with the disbursement, the criteria will be approved.
Enroll status must match Packaged to enroll status	Select this option to verify that the current enroll status for a student matches the Packaged to enroll status before disbursements can be approved. CampusNexus Student compares the student's current enrollment status to the student's 'Packaged To' enrollment status stored in the student's Academic Year. If the two statuses are not equal, an exception occurs preventing a disbursement for the student.
Check for attendance in all courses in term	This option is available only if **Evaluate by Disbursement Term** was selected above.
Must have Bachelor's Degree	This option requires that a student has completed an undergraduate program. Select **Must have Bachelor Degree** or **CANNOT have Bachelor's Degree**, but not both.
CANNOT have Bachelor's Degree	This option requires that a student has not completed an undergraduate program. Select **Must have Bachelor's Degree** or **CANNOT have Bachelor's Degree**, but not both.
Confirm Document Completion date	This option is available if **Missing Documents** is not selected. Choose one or the other, but not both. Select this option to confirm that there is a document completion date.

Field	Description
Missing Documents	Click ... next to the Missing Documents label to display a list of documents that you want to require as part of the disbursement approval criteria. The criteria will fail only when the missing documents check box is selected and the missing documents have been selected. If the option is not selected, the disbursement is approved even if the student has Financial Aid or other documents that are missing. See also Definition of Financial Aid Missing Documents. Missing Documents can be defined as *Enrollment Specific* or *Student Specific* documents. • *Enrollment specific* means that a document is considered *on file* if no Enrollment ID is specified on the document, **OR** an Enrollment ID is specified and it matches the Enrollment ID on the disbursement being evaluated. • *Student specific* means that a document is considered *on file* if the Student ID matches the Student ID on the disbursement being evaluated. When documents are configured as student specific, CampusNexus Student ignores any enrollment associated with the award. Some documents, such as Proof of Graduation, only need to be collected by an institution one time, while other documents may be enrollment specific. Documents considered by the Approve Disbursement to Pay process are specific to a student's enrollment. This means that the document is associated with the enrollment for which the disbursement is scheduled. When you select a module such as Academic Records, all assigned documents for the module are selected as well. Use the arrows buttons to move documents from the **All Documents** list to the **Selected Enrollment Specific Documents** and **Selected Student Specific Documents** lists. 

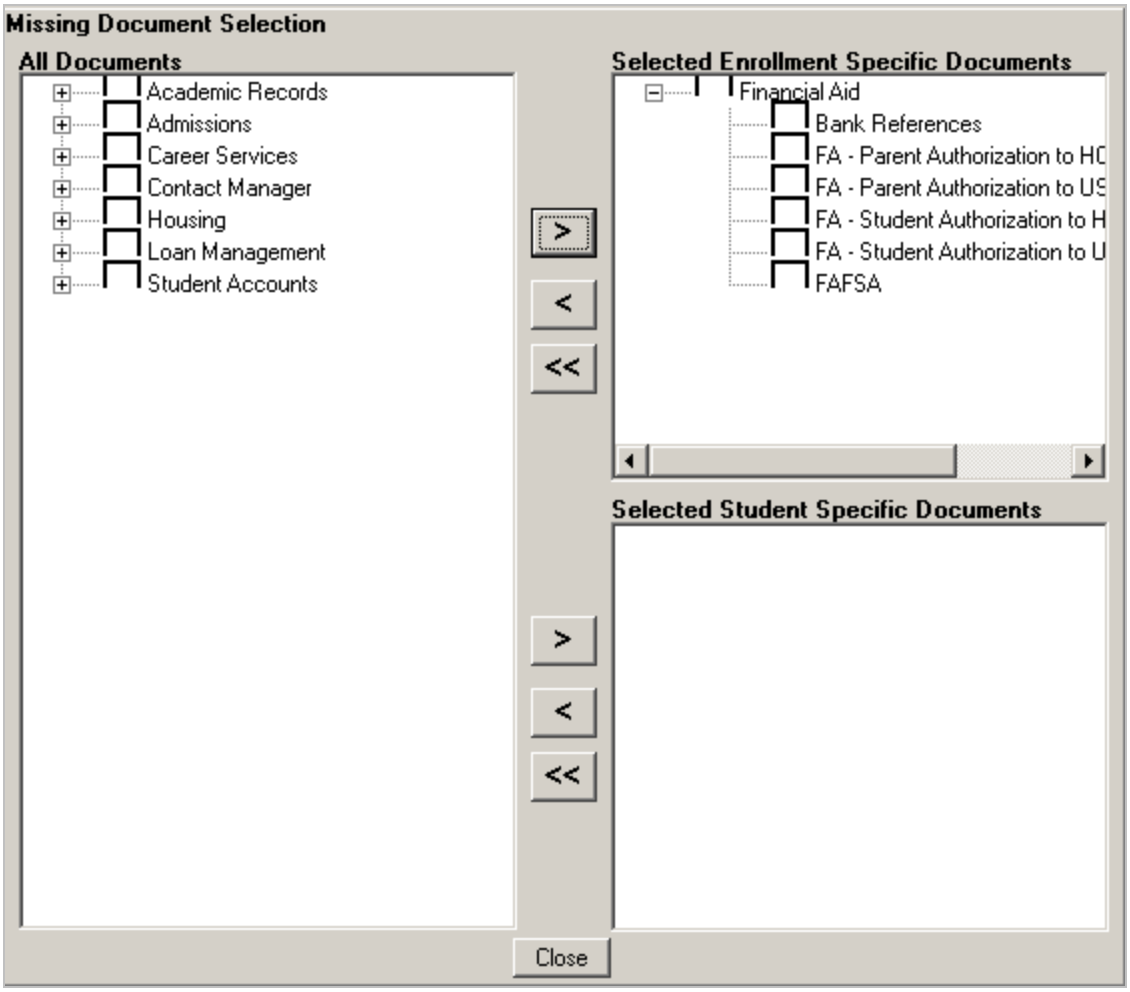
Field	Description
Student School status	Select the Student School status option if a student must be in a specified school status before a disbursement may be approved. The student's school status should be one defined in the criteria. To approve the criteria, the student status should match at least one of the statuses defined in the criteria.
ISIR on File	The student has an ISIR on file for the award year of the aid record containing the disbursement being evaluated. To approve this criteria, the FaStudentPell.DateISIRRcvd field should be populated with a valid date. Any other wrong data (null included) causes the criteria to fail.
Accepted Origination Status	The student has an accepted origination before a disbursement is approved. This criteria is applied when the fund source type is Pell, DIRPLUS, DIRSUB, or DIRUNSUB. If the fund source type is not one of the mentioned before, the criteria will be approved.
Verify Status	The student has a verification status that matches one of the statuses specified in this criteria for the award year of the aid record containing the disbursement being evaluated.
Difference in Disb. Amount	The expected amount of the disbursement does not differ from the actual amount of the disbursement by more than an amount defined in the criteria. If the amount of zero is set on the criteria, the received disbursement amount must be exactly equal to the amount expected for the criteria to pass.
First Time Borrower 30 Day Rule	Allow disbursements if the student meets the 30 day rule. • If the fund source type is SUB, UNSUB, DIRSUB, DIRUNSUB, and the First Time Borrower 30 Day Rule flag is true, the Disbursement should be greater than 30 days from the Term start date, the criteria will be approved. • If the student is not related to any term, the criteria will fail without being evaluated. • If the fund source does not belong to the ones previously mentioned, the criteria will be approved.
Days from Loan End Date	Specify the number of days between the loan period end date and the disbursement date is less than or equal to a number defined in the criteria. • If the fund source type is DIRPLUS, DIRSUB, DIRUNSUB, LOANNB, LOANNNB, PERKINS, SUB, or UNSUB, and the loan end date is not null, and the difference in days between the loan period end date and the disbursement date is less or equal to the amount of days set in the criteria, the disbursement will be approved. • If the loan end date is null, the criteria will not be evaluated but approved. • If the fund source does not belong to the ones previously mentioned, the criteria will be approved.
Originated/Certified before LDA	This flag enables you to prevent loan disbursements from Auto-Approving when a student withdraws temporarily or permanently before a loan is Originated or Certified. For more information, see Approve Disbursement to Pay.

Field	Description
State of Residency	Select this option, if you want CampusNexus Student to verify the State of Residency and Resident Since Number of Years verification as part of the disbursement approval criteria. Select the applicable state from the list.
Resident Since Number of Years	The **Resident Since Number of Years** option is disabled until the **State of Residency** option is selected. Select this option and enter the number of years the student has lived in the state selected from the Resident for Number of Years field. See also State of Residence and Resident Since Number of Years verification checks.
Resident for Number of Years	If the State of Residency and Resident Since Number of Years check boxes are selected, enter the number of years the student has been a resident of the selected state in the **Resident for Number of Years** field. **State of Residency and Resident Since Number of Years validation** First, the student's dependency status is determined. If the student is dependent, the parents' state of residency is considered; otherwise, the student's state of residency is considered. Depending on the dependency status, the correct state from the ISIR (or FAFSA) is used for matching. If the criteria of State is specified, the Resident Since Date may also be specified. If the date is specified, the date must be before the Resident Since Date in ISIR (or FAFSA). The number in 'Resident for Number of Years' represents how many years prior to the award year the individual needs to have been a resident. For example, a value of 5, when used to evaluate a disbursement for the 2006-2007 award year, means that the individual needs to have been a resident since January 1 of 2001 (2001 is 5 years before 2006).
Entrance Interview	The date of the entrance/counseling interview (if the interview was done) is associated with an enrollment rather than with the student. However, once a student has had the interview, the association is made with ALL enrollments. Select this option, if you want to require that an entrance interview be conducted before a disbursement may be approved.

10. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Selecting Missing Documents

To specify documents that are required before a disbursement can be approved, select the applicable check box under the **All Documents** section and click the right arrow (>) button to move the documents into the **Selected Enrollment Specific Documents section** or the **Selected Student Specific Documents** section. In this example, the Financial Aid documents have been selected from the **All Documents** section and moved to the **Selected Enrollment Specific Documents** section.



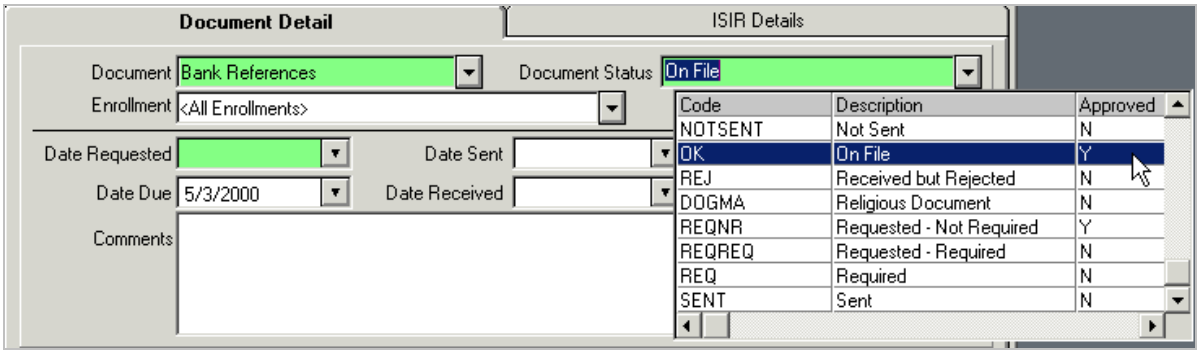
Definition of Financial Aid Missing Documents

The document is considered missing only under the following conditions:

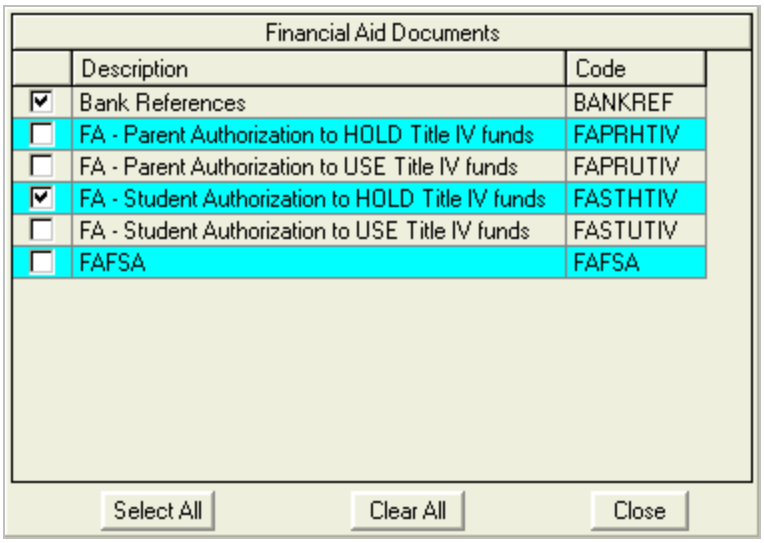
- The document configured in the missing documents criteria was requested of the student and the document has not been received (i.e., status has not changed from requested).
- The enrollment under consideration for auto-approval is for the campus and fund source at which the missing documents criteria was configured.
- The requested document is a Financial Aid document.
- The document is in the status of required (code 'REQ') or requested-required (code 'REQREQ').
- The document was set up in the criteria configuration.

If a document status has been configured as an approved status (column for Approved has a "Y" in it), a document assigned that status is considered approved.

If the Document Status changes to a status that is considered Approved , the document is *not* considered missing. The Document Status is considered an Approved status if it is configured in the Document Detail tab, and a "Y" is displayed in the Approved field.



Sample documents are listed here:

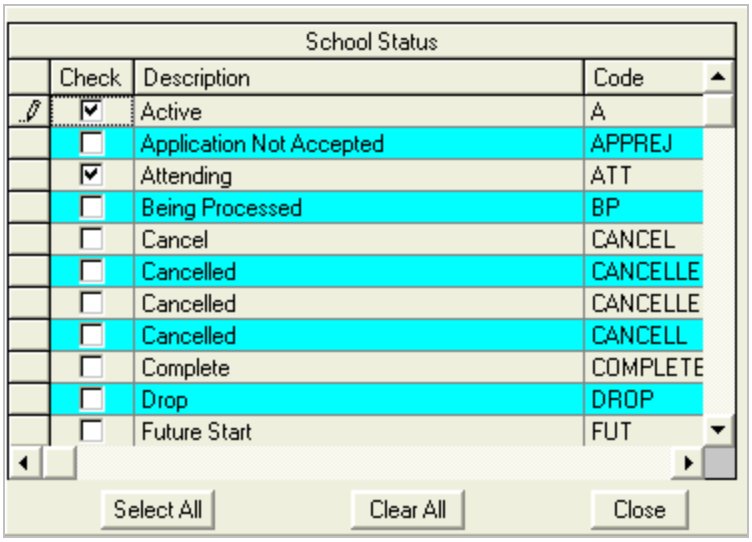


Click **Select All** or **Clear All** to select/deselect the entire list of documents. You may also select individual documents within the list.

Any documents that are chosen or cleared in this list are not saved until the **Close** button is click and the **Save** button in the **Disbursement Approval Criteria Code Setup** form is clicked. These documents were configured in the Documents tab.

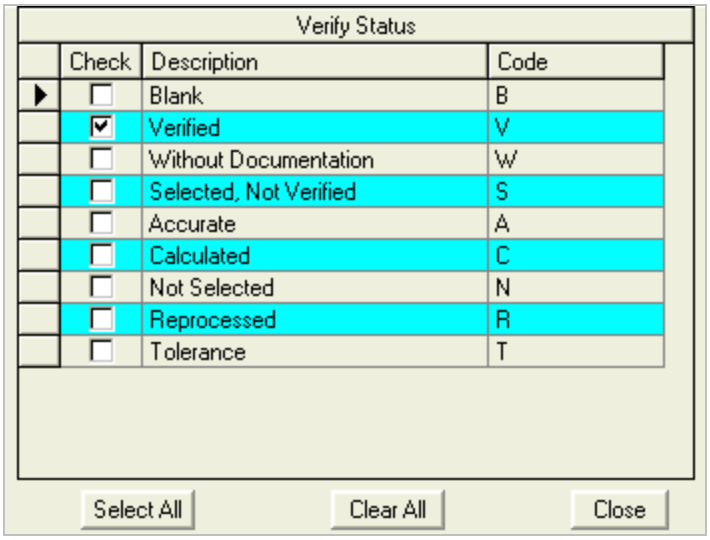
Selecting Student's School Status

If the Student School Status check box is selected, the ... button next to the **Student School Status** field is enabled. Click ... to obtain a list of school statuses. Select the applicable school statuses by selecting the check box next to the school status description field. Click **Select All** to select all school statuses, or click **Clear All** to clear all school statuses. Click **Close** to close the form.



Selecting Verification Status

If the Verify Status check box is selected, the ... button next to the **Verification Status** field is enabled. Click ... to obtain a list of verification statuses. Select the applicable verification statuses by selecting the check box beside the verification status description field. Click **Select All** to select all verification statuses, or click **Clear All** to clear all verifications statuses. Click **Close** to close the form.



Impact of Clock to Credit Conversion Rate on Disbursement Approval

The Approve Disbursements to Pay process takes the Clock to Credit conversion into consideration for a program that is configured as being subject to the conversion. It does this by evaluating the hours configured for scheduled courses and applying the conversion rate to those hours. Prior to the Final Rule for Program Integrity Issues published in the Federal Register on October 29, 2010, clients typically entered the value 20 for Quarter Credit programs or 30 for Semester Credit programs. With the publication of these final regulations, which are effective as of July 1, 2011, an updated Clock to Credit conversion rate and effective date can be configured on the FA Program version form and used for all enrollments on or after the stated effective date.

This effective date allows branching logic to apply the current conversion rate for students who enroll prior to July 1, 2011 (the effective date for the current rate) regardless of whether the disbursement date is before or after the older effective date. For students who enroll after July 1, 2011, the updated rate will be applied. July 1, 2011 is the date dictated by regulation, but since it is configurable schools may choose any date.

Example: Quarter Credit Program

This example assumes that the current rate defined in the regulations of 20 for Quarter Credit Programs is configured on the FA Program Version. The school enters the updated conversion rate of 25 required in the new regulation and enters an Effective Date of July 1, 2011.

When the Approve Disbursement to Pay process is run, the process applies branching logic that applies the 20:1 Clock to Credit ratio for all students that enrolled in the Quarter Credit program prior to the Effective Date, regardless of date of the disbursement. For all students who enrolled on or after July 1, 2011 the logic will apply the 25:1 ratio.

Example: Semester Credit Program

This example assumes that the current rate defined in the regulations of 30 for Semester Credit Programs is configured on the FA Program Version. The school enters the updated conversion rate of 37.5 required in the new regulation and enters an Effective Date of July 1, 2011.

When the Approve Disbursement to Pay process is run, the process applies branching logic that applies the 30:1 Clock to Credit ratio for all students that enrolled in the Semester Credit program prior to the Effective Date, regardless of date of the disbursement. For all students who enrolled on or after July 1, 2011 the logic will apply the 37.5:1 ratio.

Financial Aid Lists [Disbursement Schedules]

Important: The Disbursement Schedules feature and settings are disabled when a CampusNexus license is purchased and the Multiple Disbursements feature is enabled. For more information, see Multiple Disbursements.

Use the Financial Aid Lists [Disbursement Schedules] form to define disbursement dates and term codes for expected disbursements by campus group and fund source group. Duplicate Disbursement Schedule Codes are allowed in the database but not in the campus.

Once a disbursement schedule is added to the list, if you delete a selected schedule, you will remove the record from FaDisbSched for the selected FaDisbSchedID and all corresponding records in FaDisbSchedDetail, FaDisbSchedFS, and FaFundSourceGrp. The following message is displayed: *"This will remove all detailed schedules assigned to this disbursement schedule. Are you sure you want to continue?"*

When packaging students, it is important that users select a disbursement schedule to ensure they are not simply entering a date that they feel is correct, but rather relying on the disbursement schedules with dates that someone with more knowledge and authority has configured. Disbursement dates should align with the term start and end dates for credit hour term programs.

Disbursement schedules are tied to a fund source and to an academic year sequence. This enhances the speed and efficiency of packaging financial aid for students (see New Source of Aid).

CampusNexus Student provides the following configuration options related to disbursement schedules:

- Configuration for staff level security permissions provide the option to prevent the staff member from editing disbursement dates when packaging a student. If this permission is not granted for the staff member, the staff member cannot edit any disbursements when adding or editing a financial aid award.
- The Disbursement Schedule field can be configured as a required field when adding new aid to a student's package. If a disbursement schedule is not selected, a message prompts the user to select a disbursement schedule.

CampusNexus Student provides the following user support when working with disbursement schedules and packaging financial aid for students:

- When creating or editing disbursement schedules, an Academic Year sequence is available for selection to associate with the disbursement schedule.
- When adding new aid to a student's package, the Disbursement Schedule list contains disbursement schedules for the academic year that is being packaged. It also contains the disbursement schedules that are not mapped to any Academic Year sequence.
- When auto-packaging or re-packaging aid for a student,CampusNexus Student assigns the disbursement schedule for the academic year that is being packaged. Disbursement schedules that are not associated with any sequence will also be used while packaging.
- When batch packaging students and selecting the auto packaging method, CampusNexus Student assigns the disbursement schedule for the academic year that is being packaged. Disbursement schedules that are not associated with any sequence are also used while packaging.
- When editing a student's package, and re-assigning aid from one academic year to another, CampusNexus Student validates the disbursement schedule for the new academic year. If the validation fails, the option to cancel or select a new disbursement schedule for that academic year may be chosen.

The following tables contain data related to disbursement schedules:

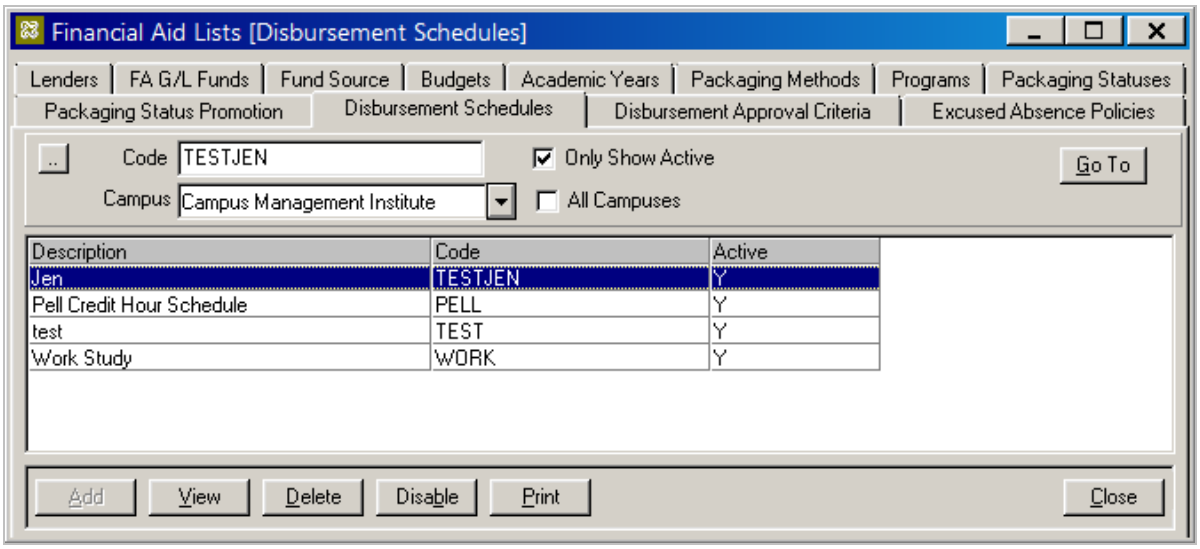
- `FaDisbSched` - defines Disbursement Schedules.
- `FaFundSourceGrp` - defines the FaFundSourceGrpID created when Detailed Disbursement Schedules are

created.

- `FaDisbSchedFS` - holds the FaFundSourceIDs associated with a Detailed Disbursement Schedule; one record per FaFundSourceID selected in the disbursement schedule.
- `FaDisbSchedDetail` - holds the Disbursement Schedule Details.

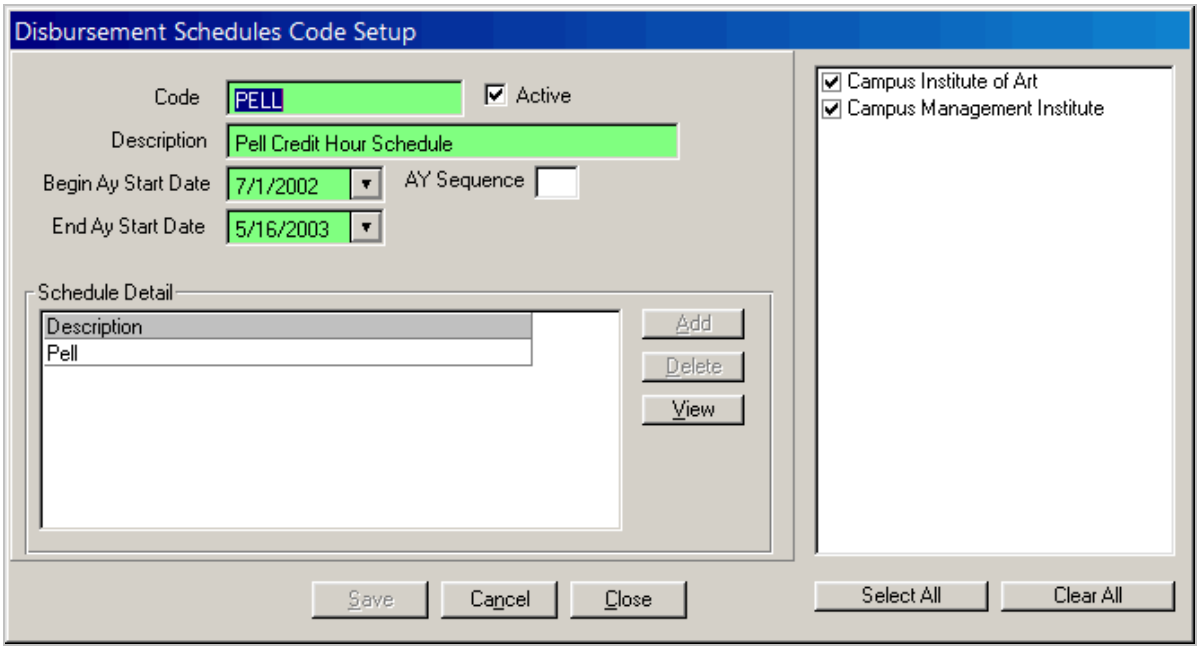
To add or edit a list of disbursement schedule codes:

1. Navigate to **Lists** > **Financial Aid**. The Financial Aid Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Disbursement Schedules**.

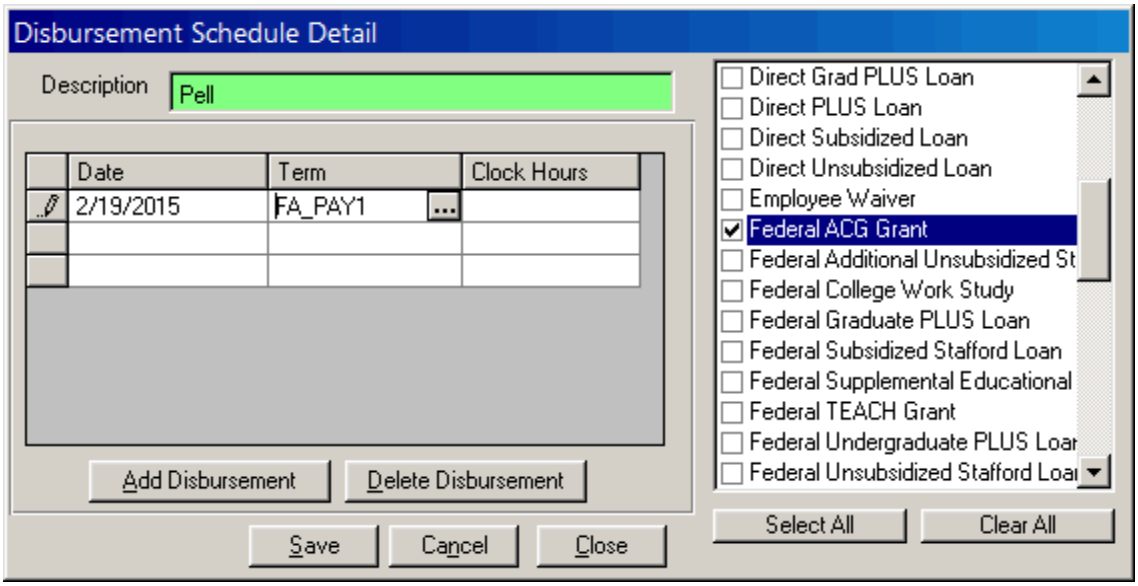


3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
6. Click **Add**, or select a record and click **Edit**. The Disbursement Schedules Code Setup form is displayed.

   Note: Add and Edit functions are not available when the Multiple Disbursements feature is enabled for the campus.



7. Specify a unique **Code**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Enter a **Description**.
10. Specify the **Beginning Academic Year Start Date** and the **Ending Academic Year Start Date**.
11. Select one or more **Campuses**. Only the campuses to which you have access are listed.
12. Click **Save**.
13. Click **Add** to add disbursement schedule details. The Disbursement Schedule Detail form is displayed.



14. Enter a **Description**.

15. On the right side of the form, select at least one **fund source** to which the disbursement schedule details apply.

    CampusNexus Student loads only active fund sources associated with the campuses selected on `frmFaDisbSched` to which you have access.

    Note: Fund sources of type Cash and Other are not included in the list because they are not used on disbursement schedules.

16. Specify the disbursement **Date**, **Term**, and **Clock Hours**.

    Click in a field in the grid and select applicable date and term values.

    The Clock Hour field allows an entry in the format: `###.##`.

    Note: The Clock Hours column is displayed only if a record exists in the `AdProgramVersion` table and `CreditClock` is "H".

17. Click **Add** to add another row to the grid. There is no maximum number of disbursements.
18. Click **Edit** to edit an existing disbursement.
19. Click **Delete** to remove a row from the grid.
20. Click **Save** to save your disbursement schedule details.

    When the new disbursement schedule detail is saved, a row is added to `FaFundSourceGrp` with the `FaDisbSchedID`, one row is added to `FaDisbSchedFS` for each fund source selected, and one row is added to `FaDisbSchedDetail` for each disbursement defined.

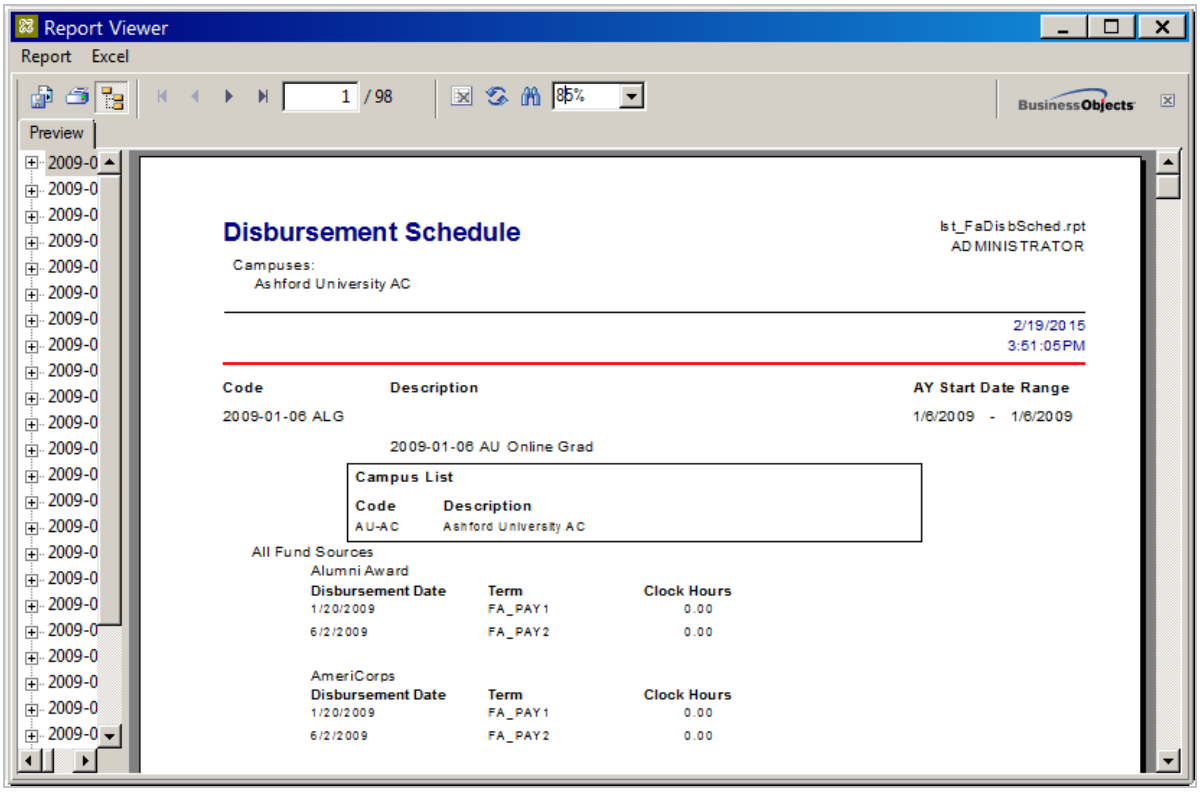
To print a list of disbursement schedules:

1. On the Financial Aid Lists [Disbursement Schedules] tab, click **Print**. The Report Selection form is displayed.
2. Select or clear **Yes** or **No** next to the Active label. If you select Yes, active records are listed on the report. If you select No, inactive records are listed. If you select both, active and inactive records are listed.

   If no records match the selection criteria, the message *"No records selected for the report"* is displayed.

3. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The Disbursement Schedules report contains the Code, Description, Academic Year Start Date Range, Schedules, and Fund Sources. It also lists the Fund Source Group Description for each schedule, the Fund Sources defined by the schedule, and the Disbursement Schedule Detail from your associated campus groups.



4. See Report Viewer for instructions on printing or exporting the report.

Financial Aid Lists [Excused Absence Policies]

Excused absence limits that are lower than the 10% excused absence allotment mandated by FSA regulations can be configured for clock hour programs based on a combination of campuses and program names.

In a clock hour program, a limited number of excused absences are allowed when deciding whether the student has satisfied the attendance obligation in a payment period. An excused absence occurs when a student is excused from hours that were scheduled were missed and do not have to be made up for the student to receive the degree or certificate for the program.

To be counted for FSA purposes, excused absences must be permitted in the institution's written policies. FSA regulations state that students can be absent up to 10% of their total clock hours and still be eligible to receive an associated degree or certificate, or be eligible to receive the next scheduled financial aid disbursement.

If an institution's accrediting agency or state agency that legally authorizes the institutiuon's operations states that the excused absence allotment is less than 10%, the institution must follow the stricter standard rather than the FSA standard. To answer these regulations, CampusNexus Studentprovides a way to manage excused absence limits in Clock Hour programs.

Example: A student in a program that has 900 hours in two 450-clock-hour-payment periods misses 20 clock hours. If the institution uses an Excused Absence Policy that allows 10% excused absences, the 20 missed clock hours are considered excused, and this student can be paid the next disbursement.

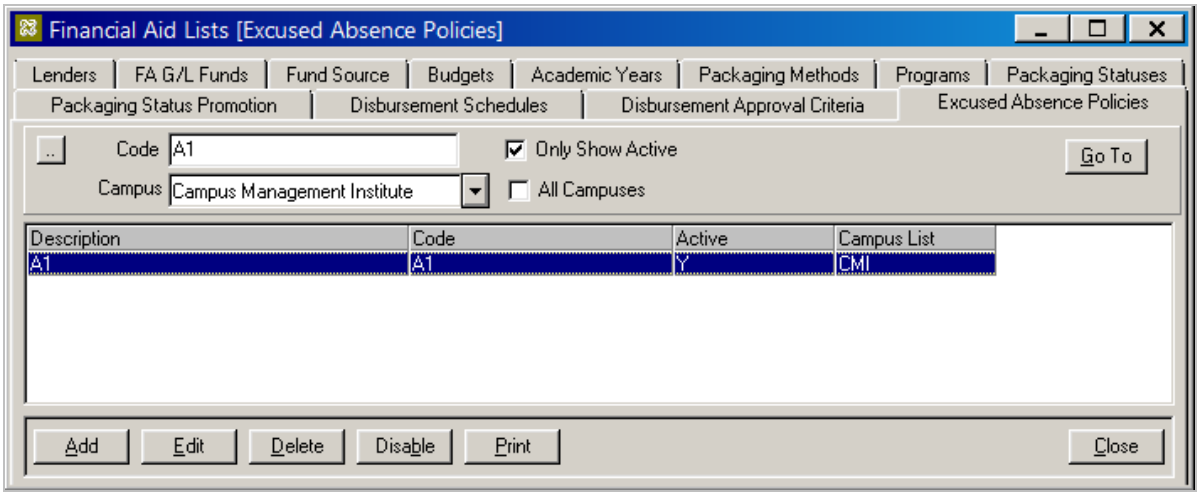
The Excused Absence Policy for an institution is configured for a specific time period using an Effective Begin Date and Effective End Date. CampusNexus Student does not allow more than one policy to be active at the same time per clock hour program.

Excused absence hours are counted as regular hours in CampusNexus Student. In the example above, if a student has 20 excused absence hours and no other absences in that time period, a total of 450 hours is counted for the 450 clock hour payment (430 hours attended + 20 hours excused = 450 hours). When a student's attendance is posted, the effective dates of the active Excused Absence Policy are taken into account to calculate the total hours attended.

For more information, see: IFAP home page.

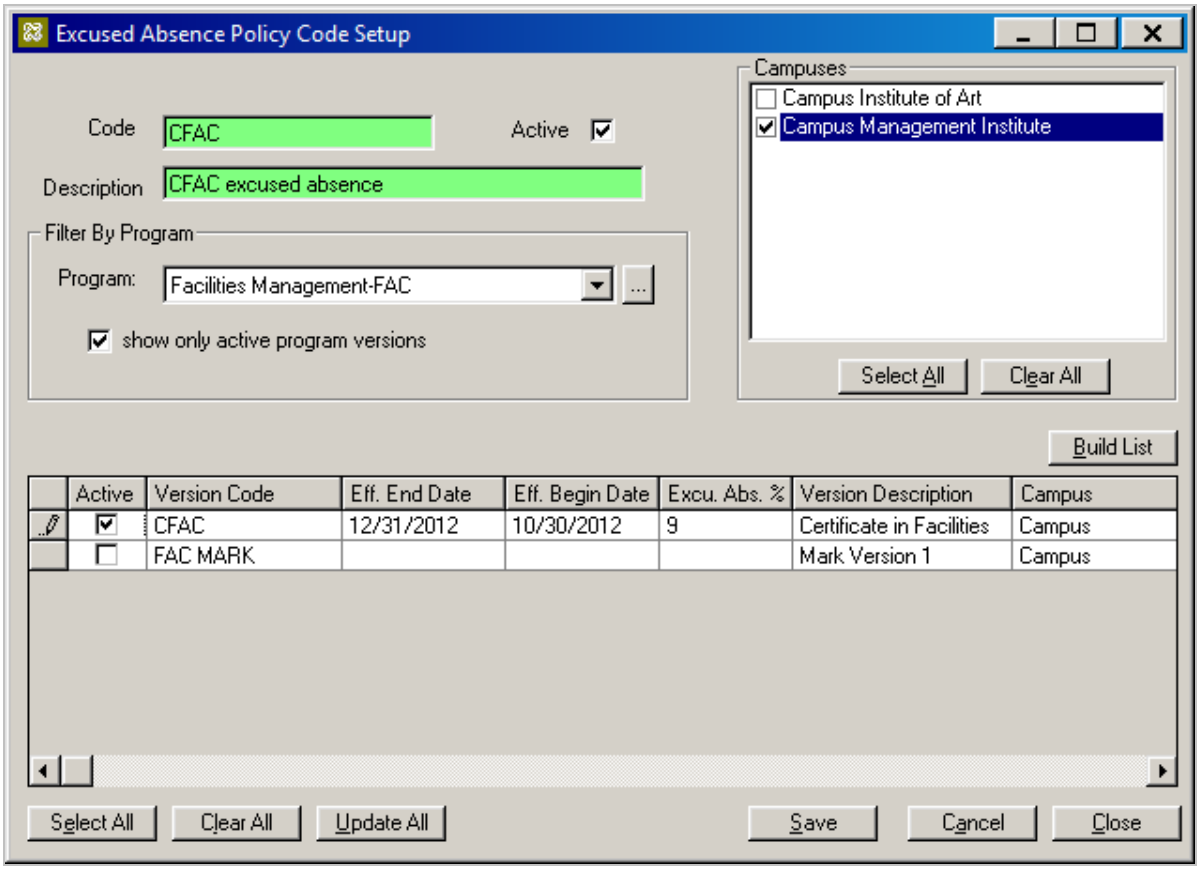
To add or edit a list of excused absence policy codes:

1. Navigate to **Lists** > **Financial Aid**. The Financial Aid Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Excused Absence Policies**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.

5. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
6. Click **Add**, or select a record and click **Edit**. The Excused Absence Policy Code Setup form is displayed.



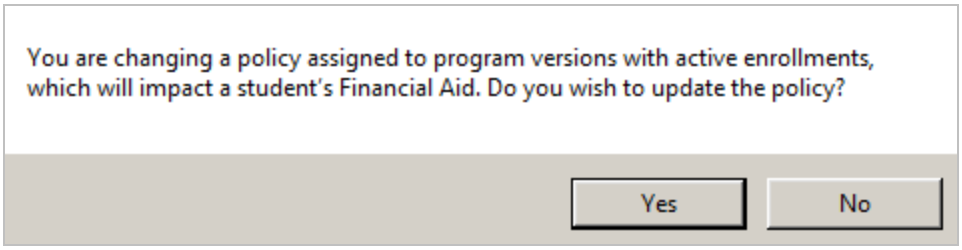
7. Specify a unique **Code**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Enter a **Description**.
10. Select one or more **Campuses**.
11. In the Filter by Program area, select a **Program** from the drop-down list. To select multiple programs, click ... . Optionally, select **show only active program versions** to filter the list by active programs.
12. Click **Build List**. A list of program versions for the select program (or programs) displays.
13. Select a **Program Version**.
14. Specify the following data for your Excused Absence Policy:
    - **Excu. Abs%**: Enter a numeric value between 1 and 10 to define the excused absence percentage.
    - **Eff. Begin Date**: Double-click a date on the calendar to select the effective begin date.
    - **Eff. End Date**: Double-click a date on the calendar to select the effective begin date.
15. Select the **Active** check box if you want the policy to be active.

The **Select All** and **Clear All** buttons set the statuses for all policies listed on the form.

Note: Only one policy for a program version can be active at the same time.

16. If a change to the policy affects active enrollments, you are prompted to confirm the change.

    Click **Yes** to confirm or **No** to return to the Excused Absence Policies form.



17. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

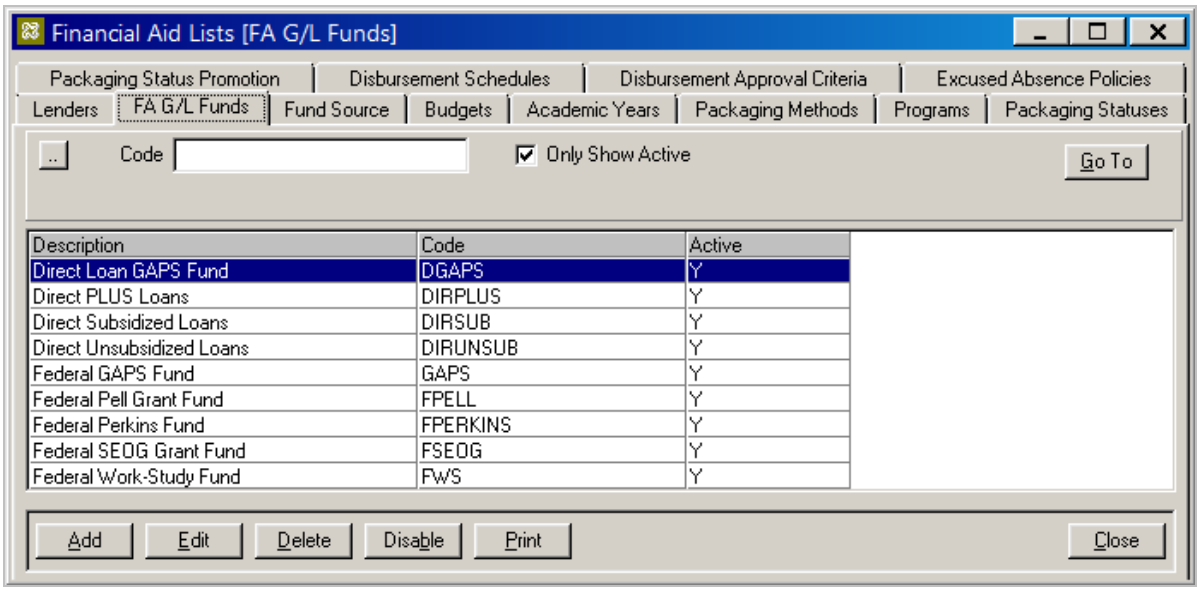
Financial Aid Lists [FA G/L Funds]

Use the Financial Aid Lists [FA G/L Funds] form to set up the FAGL Chart of Accounts (CoA) and to track fund source authorization levels.

See FAGL Overview for a discussion of the FAGL system in CampusNexus Student and FAGL Authorization for authorization levels for the FA G/L funds.

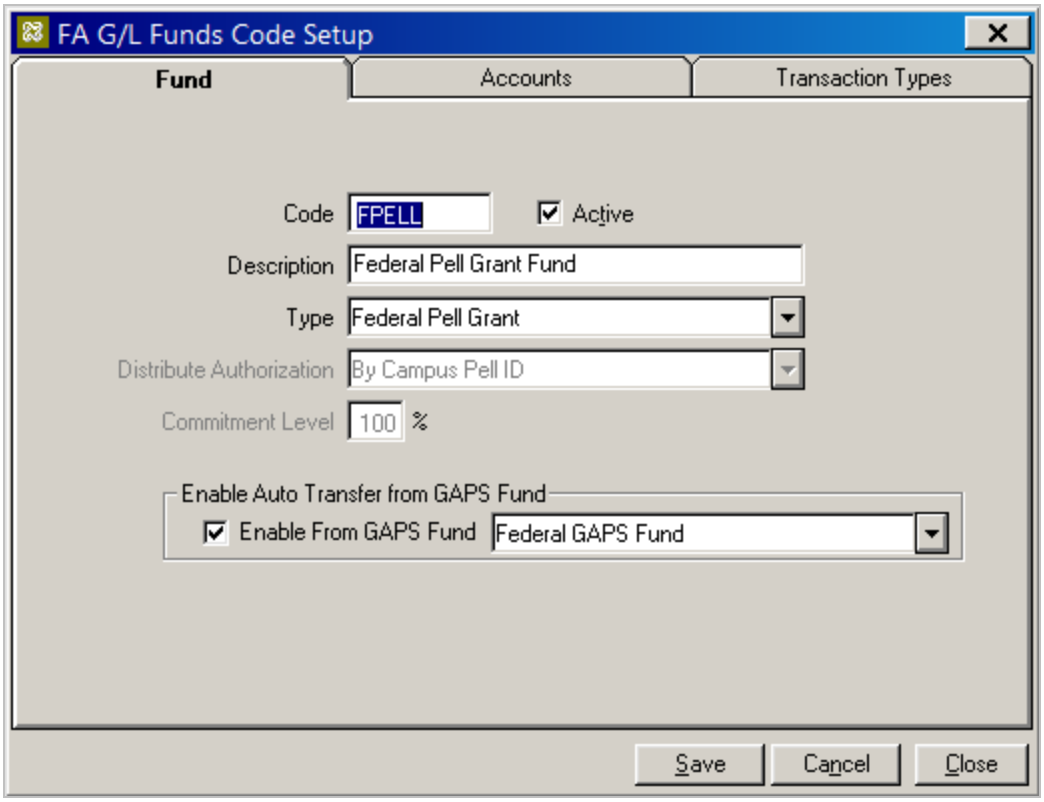
To add or edit the list of FA G/L fund codes:

1. Navigate to **Lists** > **Financial Aid**. The Financial Aid Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **FA G/L Funds**. A list of the funds used by your school for financial aid resources is displayed. The initial list is provided by CampusNexus Student. You can add funds or delete unused funds as needed.



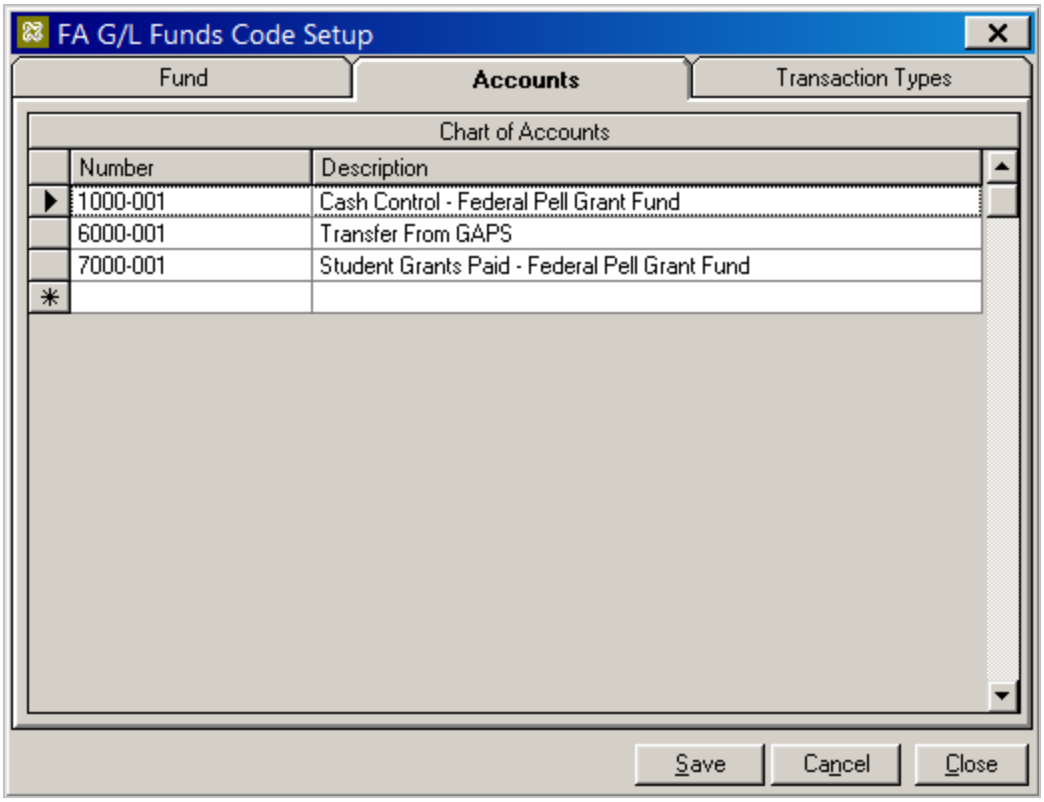
3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The FA G/L Funds Code Setup form is displayed.

   The fields that are enabled on the Fund tab vary depending on the fund type.

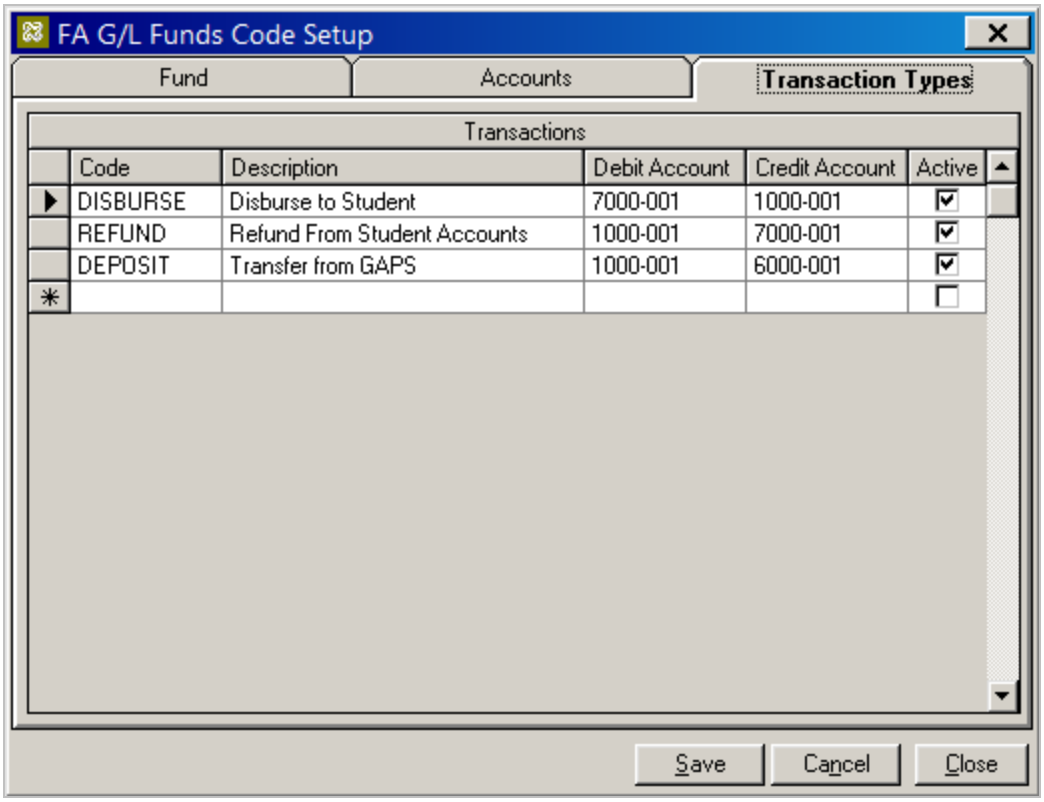


6. Specify a unique **Code**.
7. Enter a **Description**.
8. Select the fund **Type**. Fund types include:
    - G - GAPS
    - P - Federal Pell Grant
    - S - Federal SEOG
    - W - Federal Work Study
    - K - Federal Perkins Loan
    - D - Direct Loan - GAPS
    - L - Direct Loan - Program Fund
    - F - FFEL
    - O - Other (Non-Title IV Fund)
    - A - Federal ACG Grant
    - M - Federal SMART Grant
    - T - Federal TEACH Grant
    - I - Iraq and Afghanistan Service Grant
9. Select the **Distribute Authorization**. The options are:
    - C - By Campus
    - D - By Direct Loan ID (Direct Loans)
    - S - By Serial Number (Perkins, SEOG, FWS)
10. Enter the **Commitment Level Percentage**. See the FAGL Overview for a discussion of the commitment level.
11. Select or clear **Enable Auto Transfer from GAPS Fund**.
12. Select the **GAPS Fund** for automatic transfers.

13. Click the **Accounts tab** to set up the FAGL account numbers for the new or edited fund.



14. Set up a new account by entering the **Number** and **Description** in the row with the asterisk (*) on the left side.
15. Click the **Transaction Types** tab to set up the types of transactions used with the new or edited fund.



16. For each new transaction type, enter a **Code**, **Description**, **Debit Account**, **Credit Account**, and **Active status** in the row with the asterisk (*) on the left side.

17. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Financial Aid Lists [Fund Source]

Use Financial Aid Lists [Fund Source] form to set up the types of financial aid available to students in your institution. Some fund sources are grants that the student is not required to repay. Other fund sources are loans from the Department of Education (direct loans) or from other institutions such as banks and other lending organizations. Loans have to be repaid to the lender by the student or parents, usually with interest. See also Cash-Other Source Form and Posting Cash/Other Payment Plans (Reamortizing future payments) for additional information on the fund source type of Cash-Other.

You can post FA disbursements received without requiring that they be scheduled first. This is a quicker method of posting FA disbursements to a Ledger Card. You are prompted for a minimal amount of information concerning the financial aid. The information is used to fill in the standard FA packaging tables when the payment is saved.

Elsewhere in CampusNexus Student, your financial aid department uses these fund sources to assemble a "package" of financial aid to cover the student's cost of attendance (COA) by combining funds from these fund sources. For details on Packaging, refer to Awards and Packaging.

On July 29, 2006, the Common Origination and Disbursement (COD) System began sending Electronic Statement of Account (ESOA) reports reflecting authorizations for the new grants to institutions. See COD grants.

The College Cost Reduction and Access Act of 2007 created the Teacher Education Assistance for College and Education (TEACH) Grant program which provides grants of up to $4,000 per year to students who intend to teach in a public or private elementary or secondary school that serves students from low income families. This program took effect on July 1st, 2008. Students must be U.S. citizens and be eligible for a Pell Grant. See COD grants.

TEACH Grant awards are validated to ensure that if the earliest disbursement occurred after March 1, 2013, the maximum amount packaged is reduced as required in the sequestration legislation. Any institution that disbursed TEACH funds to students with the earliest disbursement after March 1, 2013 using the pre-sequester maximum award amounts must recalculate the TEACH Grant award amounts for upcoming payment periods.

Beginning in the 2010-2011 award year, Pell-ineligible students who were dependents of a veteran who died as a result of service in Iraq or Afghanistan after September 11, 2001 may be eligible for the new Iraq and Afghanistan Service Grant. Students who are eligible for this grant must meet the following conditions:

1. The “Dependent of Deceased Veteran” must be selected on the student when awarding an Iraq and Afghanistan Service Grant.
2. The award amount must not be greater than the Pell award maximum for the award year.
3. The student is not Pell Eligible due to EFC.
4. The award year is 2010-11 or greater.

The Return to Title IV worksheets reflect the current versions of the Department of Education which include the IASG grant. The Department of Education posted revised Return of Title IV Aid (R2T4) Worksheets which must be used for any student whose withdrawal date is on or after July 1, 2010. The R2T4 calculation for students who withdraw after July 1, 2010 was modified to ensure that the calculation is performed correctly and to ensure that institutions are compliant with the current regulation.

Note: If a refund calculation has been created for a student who has a withdrawal date on or after July 1, 2010 prior to the installation of this enhancement, the forms are refreshed, but the calculated values are not updated. The number of students that have the IASG grant on file is expected to be small, but a script has been created that can be provided to the users upon request so that the users can recalculate the students, if needed.

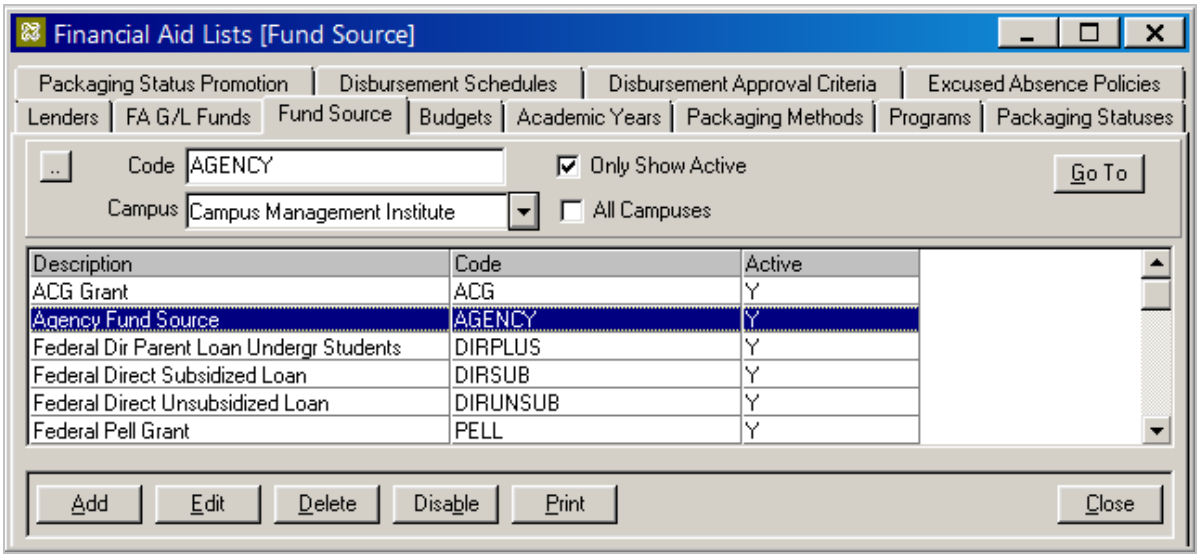
See Transaction Codes and Cash Receipts Summary for additional information regarding an institution's compliance with 90/10 regulations.

Refer also to Fund Source Permissions.

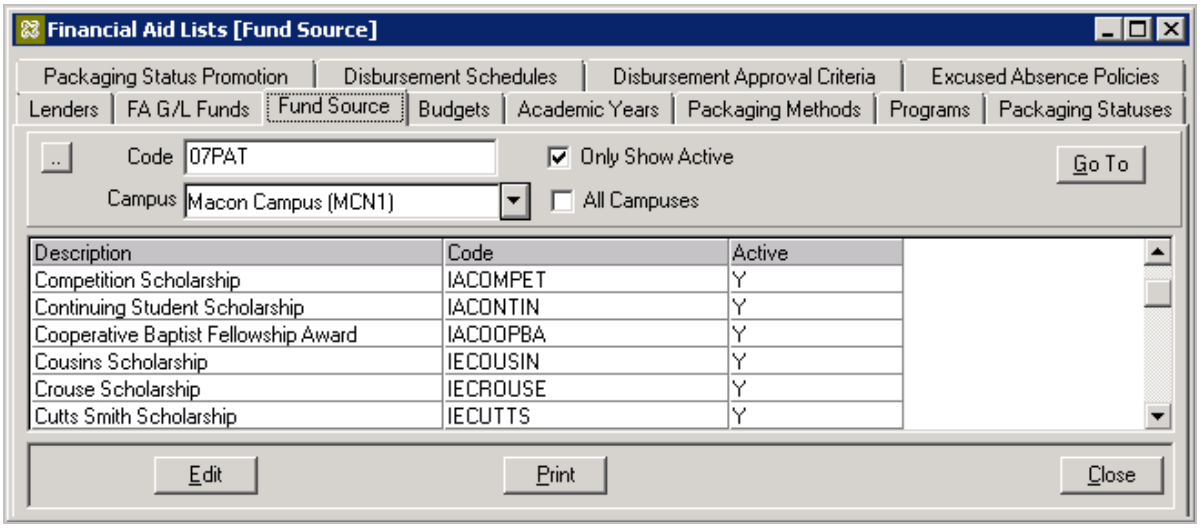
See Noel Levitz Properties for information regarding Noel Levitz reporting properties.

To add or edit a list of fund source codes:

1. Navigate to **Lists** > **Financial Aid**. The Financial Aid Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Fund Source**.



Note: When CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll, fund sources are created in CampusNexus Finance, HR & Payroll. The Fund Source Code Setup forms displays only the fund sources that are configured in CampusNexus Finance, HR & Payroll to appear in CampusNexus Student. Fund sources cannot be deleted in CampusNexus Student and the following fields are in read-only mode: Code, Description, Active, fund source type, and associated Campuses fields. Modifications to these fields can only take place in CampusNexus Finance, HR & Payroll. The Add, Delete, and Disable buttons are removed from the Financial Aid Lists [Fund Source] form.

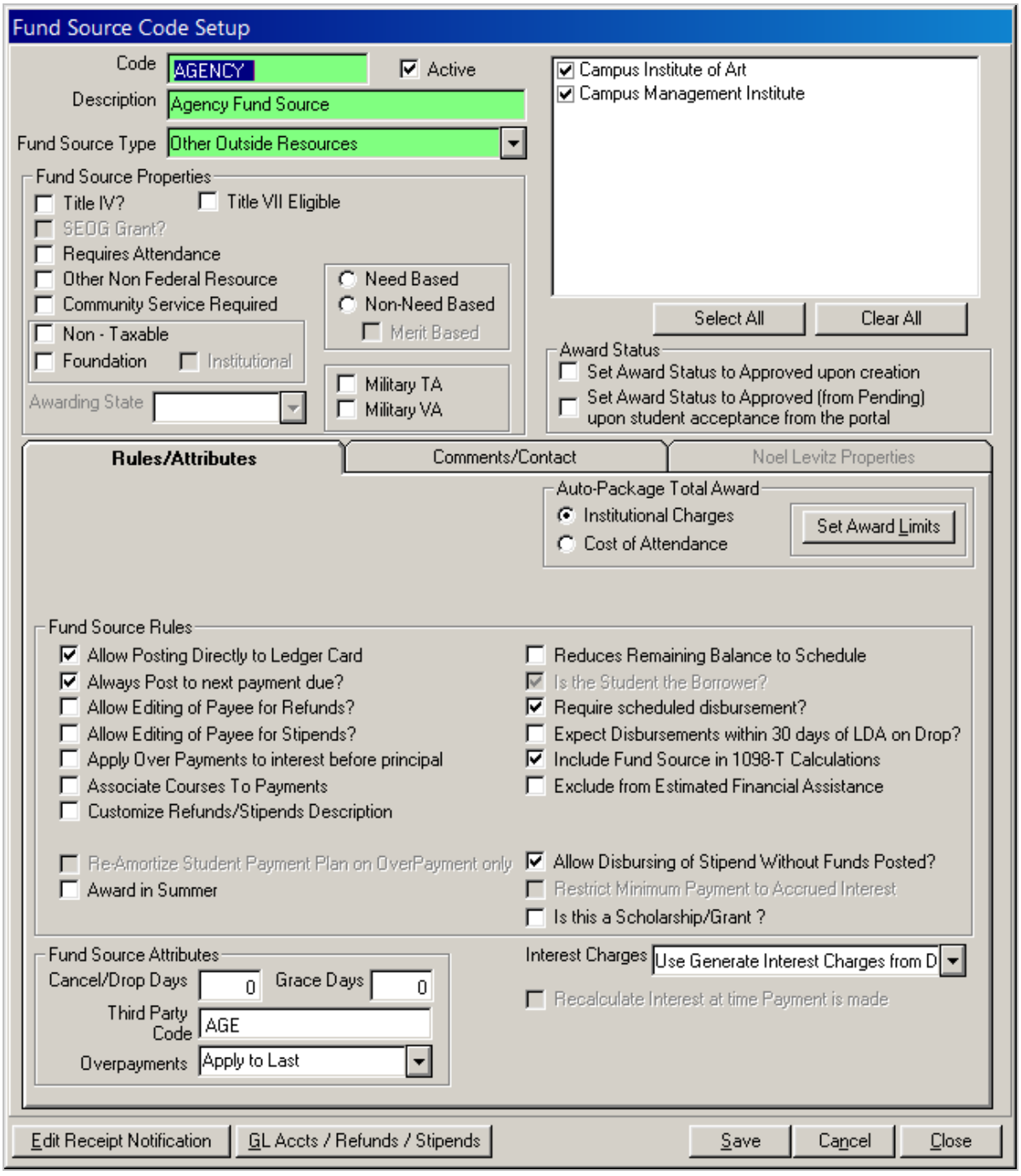


See Initial Configuration of CampusNexus Finance, HR & Payroll.

3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in

the text box and press **Enter** to view the corresponding record in the list.

4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
6. Click **Add**, or select a record and click **Edit**. The Fund Source Code Setup form is displayed.



7. Specify appropriate options. See Field Descriptions.

8. Click **Edit Receipt Notification** to edit the Notification of Receipt Report. Access to the Crystal Reports system is required for this function. CampusNexus Student checks if a report exists for the selected fund source. If a report exists (cst_FaXXXXXXXXReceipt), the report is loaded. If a report does not exist, the default receipt (lst_FaDefaultReceipt) is copied to cst_FaXXXXXXXXReceipt. The cst_FaXXXXXXXXReceipt is then loaded for editing.
9. Click **GL Accounts/Refunds/Stipends** to specify general ledger (GL) debit and credit account numbers for each fund source. The account numbers are used to release transactions to the general ledger when funds for the fund source are received or refunded. Refunds and stipends do not have to share the same debit and credit account numbers. Typical cash transactions debit the cash account and credit the AR account; however, for some FA fund sources, the GL entry are different. If the GL accounts are blank for a fund source, the default accounts for a cash-received transaction are used to post to the GL. See the GL Account form example.
10. The **Disb Approval Criteria** button is enabled when the **Automated Disbursement Approval** check box is selected for least one of the campuses in the Fund Source Campus List. Click this button to specify which approval criteria set to use for each campus and fund source.

    See Loans, Award Limits (Set Banks and Set Award Limits buttons), and Collections.
11. Click **Save**. If a Fund Source Security message is displayed, follow the path listed in the message and refer to Financial Aid General Setup to implement Financial Aid Fund Source Security permissions.
12. Click **Close** to close the form.

Field Descriptions

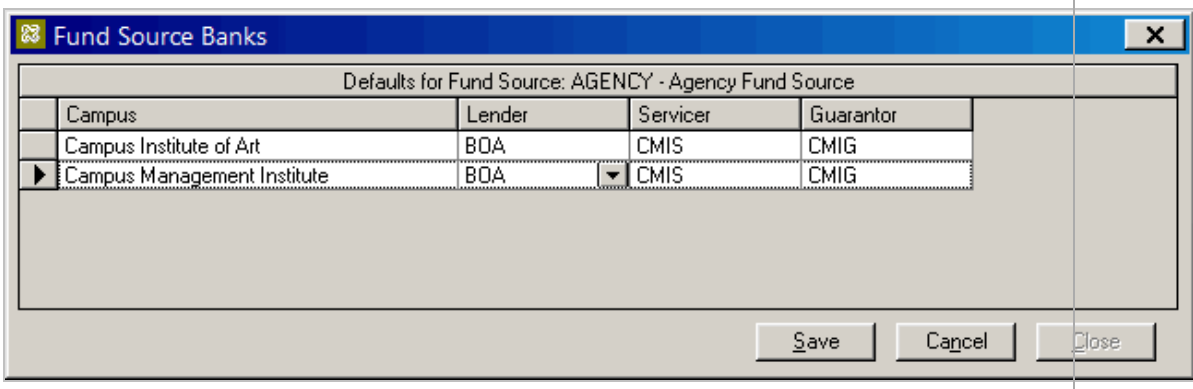
Field	Description
Code	Enter a unique code that can be recognized in your institution as belonging to this fund source.
Active	Select the Active check box, if this is an active fund source. Clear the check box to block the use of this fund source for future financial aid packaging.
Description	Specify a description for the fund source.
Campus	Select the campuses that use this fund source for packaging students.

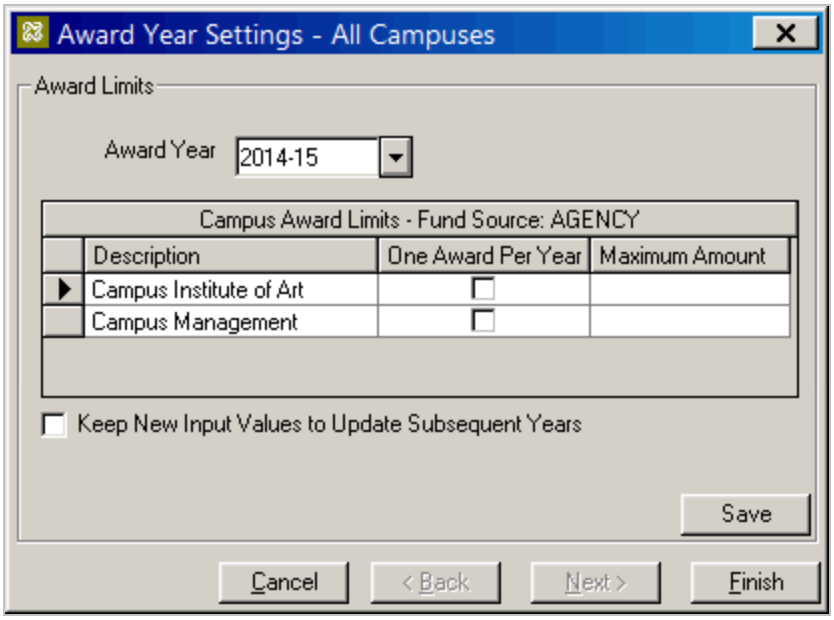
Field	Description
Fund Source Type	Select the fund source type. Types of grant and loan fund sources include: • Pell Grant • Grant (Other than Pell) • Perkins Loan • Other Need-Based Loans (LOANNB) • Other Non-Need-Based Loans (LOANNNB) • Parent Loan (PLUS) • Subsidized Stafford • Unsubsidized Stafford • Work Study • Direct Subsidized Loan (from DE) • Direct Unsubsidized Loan (from DE) • Direct Parent Loan (from DE) • Student Payments • Other Outside Resources • Scholarship • Grant (TEACH) Teacher Education Assistance for College and Education • Iraq and Afghanistan Service Grant (IASG) The fields displayed and enabled on the form depend on the fund source type selection.
Fund Source Properties	
Title IV?	Select this option if this is a Title IV fund source. If this check box is cleared, the Other Non Federal Resource check box becomes available.
SEOG Grant?	This check box is enabled when the fund source type is Grant. If the fund source is a Supplemental Educational Opportunity Grant (SEOG), select this check box to distinguish it from other grants. This field is used in the FISAP report logic to identify the SEOG records to include in the report.
SEOG Match %	This field is enabled when the SEOG? option is selected. Specify the percentage of matching SEOG grant funds provided by your institution in the SEOG Match % field. The format for entering the percentage is ##.## where 25.00 = 25%. This information is important when returning Title IV funds.
Requires Attendance	Select this option if attendance is mandated by an outside entity for students receiving this fund source. Enabling this option ensures that the LDA is used as the NSLDS Withdrawal Date.
Other Non Federal Resource	This check box is enabled only if the Title IV? check box is cleared. Select this option to indicate that this fund source will be applied toward students' institutional cost before Title IV and other cash payments in the institution's 90/10 calculation. Setting this flag may affect whether stipends/credit balances are counted as revenue in the 90/10 formula. See 90/10 Report.

Field	Description
Institutional	This option is available only for fund sources that have fund source types of Grant (other than Pell), Scholarship, or Cash. Select this check box to indicate that the fund source is an Institutional Grant (other than Pell) or Institutional Scholarship fund source type. This enables you to configure your institution's scholarships and grants so that the 90/10 rule can properly address aid of these types in the calculation. **Note**: On August 14, 2008, the Higher Education Opportunity Act (HEOA) - H.R. 4137 went into effect allowing institutions to count as revenue (between July 1, 2008 and July 1, 2012) the net present value of loans made by the institution. This law will revert back in 2013 to only allow payments received to be counted as revenue. As such, you can configure a fund source type of Student Payment (Code = CASH) as an Institutional loan. You may specify a 90/10 Report Calculation Reserve % Rate for years 2009 through 2010 for the Student Payment (Code = CASH) fund source. The Reserve rate percent must a value of 100 or less.

Field	Description
Need Based / Non-Need Based / Merit Based	When a fund source type of Scholarship, Grant Other than Pell, or Other Outside Resources is selected in the fund source type list, the Need Based and Non-Need Based options become enabled. These options allow authorized users, who are not configured to use Automated Processes in CampusNexus Student, to configure the need based and non-need based aid for these fund source types. If 'Non-Need Based' is selected, the 'Merit Based' check box becomes enabled. Indicate whether the fund source that is non-need based is merit based by selecting the 'Merit Based' check box. For institutions using CampusNexus Student 16.0 and higher, you can configure the Other Outside Resources fund source type as a Scholarship or Grant by selecting the 'Is this a Scholarship/Grant?' check box. This selection ensures proper record keeping and processing of 1098-T data (the fund source is treated like a scholarship when the check box is selected). If the check box is not selected, the fund source is not treated as a scholarship and the existing 1098-T Processing Utility functionality is preserved. If the scholarships are greater than the charges, the 1098-T Processing Utility no longer allows the printing of the 1098-T statement. This functionality applies to all versions of the CampusNexus Student. **Note**: This option should not be configured if the intended use of the fund source is to be a student payment or cash plan. CampusNexus Student recognizes the Need Based and Non-Need Based configurations on the Fund Source Code Setup form for the fund sources selected when calculating financial aid packages for students in the following areas: • Manual Packaging • Auto Packaging • FA Batch Packaging • RBS (Remaining Balance to Schedule) The calculations for the Need Based Aid Packaged and the Non-Need Based Aid Packaged are populated with the correct RBS (Remaining Balance to Schedule) on the Financial Aid Packaging form. The Need Based Aid calculation is displayed in the Gross Need Based Aid Pkgd field and the Non-Need Based Aid calculation appears in the Non-Need Based Aid Pkgd field. If neither Need Based or Non-Need Based aid is configured for these fund sources, aid is will calculated and stored as Need Based.
Award Status	
Set Award Status to Approved upon creation	Select this option to specify that CampusNexus Student will automatically package the award in approved status when predefined conditions are met. This applies to Auto Packaging, Batch Packaging, and Estimates. These awards do not require student acceptance from Portal.

Field	Description
Set Award Status to Approved (from Pending) upon student acceptance from the portal	Select this option to specify that the award will be automatically approved after the student accepts the award online. **Note**: You can select one Award Status option or the other, but not both. You may leave both options cleared.
Rules/Attributes tab	
Collection Options	Collection Options are available to manage student collections if the fund source type is Student Payments and the fund source is Cash. Select the 'Use Outside Collections' check box if you are using an outside collections agency or vendor. In the Grace Period field, specify the number of days between billing cycles. The number entered must be a numeric value greater than or equal to zero. Negative numbers are not allowed. Loan types other than Cash are not displayed in the collections fields.

Field	Description
Set Banks (button)	The Set Banks button is only available when the selected fund source is a loan. 1. Click **Set Banks** to define the "Defaults for Fund Source" per Campus location. The Fund Source banks form is displayed.  2. In the Display By section, select **Code** or **Description** to sort the grid. 3. For each campus, use the drop-down list to select the Lender, Servicer, and Guarantor. • Lender - Enter the bank to use as the default lender when adding a new loan. **Note**: A default lender and/or guarantor needs to be specified for loan fees to be calculated when this fund source is packaged within the Financial Aid Estimates option. A lender and guarantor is not entered by the user who creates an Estimated FA package. The lender and guarantor is assumed using the default lender and guarantor specified here. The resulting fees for each loan packaged are calculated using the fee percentages set up for the lender and guarantor that are specified on this form. If a default lender and guarantor are not specified for the fund source being packaged, the loan fees are not calculated. Thus, the gross and net award amounts will be the same. • Servicer - Enter the bank to use as the default servicer when adding a new loan. • Guarantor - Enter the bank to use as the default guarantor when adding a new loan. The default banks set here are displayed when adding awards via View > Financial Aid > Estimates, or View > Financial Aid > Awards, and batch packaging under Daily > Financial Aid > Batch Processing > Batch Packaging > Packaging paths. 4. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.
Auto-Package Total Award	Select whether you want to auto-package the total award based on Institutional Charges or Cost of Attendance (COA).

Field	Description
Set Award Limits (button)	The Set Award Limits button is not displayed if one of the following fund source types is selected: Pell, SUB, UNSUB, PLUS, DIRSUB, DIRUNSUB, DIRPLUS or TEACH. The Set Award Limits button is available for Agency fund sources and is used configure award limits of the fund source for individual campuses. See Award Year Settings for additional information. 1. Click **Set Award Limits**. The Award Year Settings form is displayed. It lists the campuses for which you have permissions. The fund source name is listed next to the caption "Campus Award Limits".  2. Select the **Award Year**. 3. Select the **One Award Per Year** check box and specify the **Maximum Amount** of the award for a campus. If these fields are left blank, there are no loan limits for the campus, fund source, and award year. 4. Select **Keep New Input Values to Update Subsequent years** if applicable. 5. Click **Save** and **Finish** to close the form.
Fund Source Rules	
Allow Posting Directly to Ledger Card	Select this option if your institution allows postings that affect this fund source directly to the student's ledger card. Such postings could be rather than, or in addition to automated procedures such as posting FA disbursements.
Always Post to next payment due	This option is enabled only when the Allow posting Directly to Ledger card option is selected. The default is set to Yes when setting up a new fund source.

Field	Description
Allow Editing of Payee for Refunds?	Select this option to allow users to change of the payee information when processing a refund check.
Allow Editing of Payee for Stipends?	Select this option to allow users to change the payee information when processing a stipend check.
Apply Over Payment to interest before principal	This option is available for fund source types of Cash or Other only. Select this option to indicate that payments should be applied to interest before principal.
Associate Courses To Payments	This option is available only for Cash, Other, or Scholarship fund source types. By selecting this option the Auto Create Payment Schedule check box becomes enabled. Select this option to associate a course with a payment. The course associated with the payment is printed on the Agency Billing Invoice. This is useful when Agencies are billed for students and require that the course appear on the invoice. See also Cash/Other Source Form and Grant/Scholarship Form.
Customize Refunds/Stipends Description	Select this option to customize refund and stipend transactions. The Refund's Description and Stipend's Description fields become enabled upon selecting this option. Enter appropriate descriptions in each field. We recommend that you include the fund source in the description. CampusNexus Student adds the financial aid award year to the descriptions entered in the fields for up to 100 characters. These descriptions are displayed to the student in Portal. Refer to Post Refunds, Post Stipends, Process Refunds and Stipends and Ledger Cards for additional information.
Allow Printing of Promissory Notes	Select this option to print promissory notes from CampusNexus Student. Promissory Notes are used with any type of Student Payments (i.e., fund source type Cash).
Reduces Remaining Balance to Schedule	This option is displayed if you select a fund source type of Other. By default this option is cleared indicating that your institution does not reduce the remaining balance due to other types of funding, such as Veterans Administration benefits, paid directly to the student. This feature prevents over-awarding students.
Award in Summer	Select this option for the fund sources that you want to have included in the Financial Aid Summer Term packaging. When this option is not selected, the packaging process excludes the fund source for summer.
Package Crossover Term/Payment Period with Award Year 2 ISIR	Selecting the 'Package Crossover Term/Payment Period with Award Year 2 ISIR' check box enables users to allow the term/payment period that is crossing over to be packaged in the second award year using that second ISIR value. This can occur only if the student has exhausted their Pell award for Award Year 1 and has not been packaged for any additional funding for that term/payment period. If the check box is not selected, the standard awarding of the disbursement by the term/payment period falling within the award year that is being packaged is followed. By default, this check box is cleared.

Field	Description
Is the Student the Borrower?	This field is enabled only when the fund source type is Other Need-based Loan (LOANNB), or Other Non-Need-based Loan (LOANNNB). Select this option if the student is the borrower. Clear the check box if someone other than the student is the borrower. CampusNexus Student checks the flag when saving the record.
Graduate Student Borrower? (Graduate PLUS)	The check box is enabled only when the fund source type is Parent Loan (PLUS) or Direct PLUS Loan (DIRPLUS). Select this option if the borrower is a graduate student. CampusNexus Student checks the flag when saving the record. The Master Promissory Note displays the proper caption depending on how this flag is set. If this option is selected, the second line on Section A reads, *"I am a Graduate or Professional Student"*; otherwise, it reads, *"I am a Parent of a Dependent Undergraduate Student"*. Under the Higher Education Reconciliation Act (HERA), graduate students may be eligible to receive PLUS loans. Previously, PLUS loans were made to parents of students enrolled in institutions to assist in funding the students education. To support the Grad PLUS loans, this flag is available for fund source types that are PLUS and DIRPLUS. You can package Grad PLUS under the Direct Loan and FFEL PLUS programs for students by setting up fund sources with the PLUS or DIRPLUS fund source type. Direct Loan Grad PLUS loans may be processed through COD functionality.
Expect Disbursements within 30 Days of LDA on Drop?	Select this option to leave disbursements in a scheduled status if the scheduled disbursement date is within 30 days of the student's last day of attendance (LDA), and the student's status is changed to 'Drop'. The default for this check box is cleared.
Include Fund Source in 1098-T Calculations	This check box is enabled when a fund source type of IASG, Scholarship, Other, Pell, TEACH,, or Grant is selected. Select or clear this check box to indicate whether the fund source shall be included in the 1098-T calculation for scholarships and grants.

Field	Description
Round all Disbursements to whole dollars?	This option is displayed only for the Pell Grant fund source type. When this option is selected, the ability to Round Refund Amounts on R2T4 becomes available. CampusNexus Student rounds Direct Loan funds per COD requirements and allows Pell amounts to be rounded as defined in the FSA Handbook. CampusNexus Student makes the adjustments when posting the Financial Aid Refund Calculation. Rounding can be configured to be activated within the Refund Calculations for refund amounts, and for it to be applied when the results from the refund calculation are posted to the student ledger (i.e., the refund calculation results may show a particular fund with cents, but when the results from the refund calculation are posted to the ledger, the rounding logic is applied rounding to the nearest dollar). If the 'Round all Disbursements to whole dollars' check box is cleared and the registry key to allow Pell Cents is enabled, then the exact amount of cents is displayed and saved for the Pell origination amount. The Pell origination amount is processed and saved with the properly calculated amount of cents in regards to Year-Round Pell Additional Eligibility Indicator. **Note**: This option takes effect with any refunds that are done from the time of implementation of CampusNexus Student version 15.0; there is no retroactive handling of rounding of any existing refunds that have not been posted.
Require Disb. Sched. when Awarding New Aid	Select this option to set disbursement schedules as a required field when setting up new aid.
Exclude from Estimated Financial Assistance	This option is displayed only if you choose a fund source type of Other or IASG. This option allows authorized users to specify if a fund source will not reduce the student's remaining "Need" for financial aid. By default this option is cleared.
90/10 Report Configuration - Disbursed from an established restricted account, and funded by outside sources	When the selected fund source type is Grant (Other than Pell) or Scholarship and the Institutional check box is selected, the 90/10 Report Configuration section is enabled displaying a check box labeled 'Disbursed from an established restricted account, and funded by outside sources'. When this check box is selected, the fund source is an institutional scholarship or grant that meets the defined conditions (i.e., the scholarships or grants are disbursed from an established restricted account and funded by outside sources or income earned on such funds). The 90/10 report includes this aid in the revenue calculation.
Require scheduled disbursement?	When adding a new fund source, this check box is selected by default. Clear this check box to post Financial Aid disbursements without requiring that they be scheduled first. This check box is disabled for fund source types IASG, Pell, DIRSUB, DIRUNSUB, and DIRPLUS. Disbursements for these fund sources are required to be scheduled before disbursements are processed. Work study awards are an exception, and because no payments can be scheduled for work-student, the check box is not displayed.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Allow Disbursing of Stipend Without Funds Posted</td><td>This option (selected by default) at fund source level works in conjunction with the Disburse Stipends? options at campus and system level so that different fund sources can be separated, if necessary, to validate whether a stipend can be posted for a specific fund source that has not yet had funds posted.

Note: See the table of possible interaction scenarios between campus/system level and fund source level configurations.</td></tr>
<tr><td colspan="2">Fund Source Attributes</td></tr>
<tr><td>Cancel/Drop Days</td><td>Specify the number of days with in which the student is permitted to cancel or drop the enrollment and loan without having to repay a portion of the loan.</td></tr>
<tr><td>Grace Days</td><td>Specify the number permitted to the student after graduation or dropping out of school before the repayment of the loan must begin. This value is used to calculate the first repayment date for each loan in the Exit Interview form.</td></tr>
<tr><td>Third Party Code</td><td>Specify a Third Party Code (ID number) which represents the institution's third party servicer (if any). This number is usually provided to the institution by the servicer and represents an identifier by which the institution is known to the servicer.

Note: When using a servicer to process awards that are sent to COD, the following fund source types must be selected for the corresponding fund sources:

Fund Source Types
<table>
<tr><th>Fund Source</th><th>Fund Source Type</th></tr>
<tr><td>TEACH</td><td>Grant (other than Pell)</td></tr>
<tr><td>Pell</td><td>Pell Grant</td></tr>
<tr><td>Direct Subsidized Loan</td><td>Subsidized Stafford</td></tr>
<tr><td>Direct Unsubsidized Loan</td><td>Unsubsidized Stafford</td></tr>
<tr><td>Direct Plus Loan</td><td>Plus Loan</td></tr>
</table></td></tr>
<tr><td>EFT</td><td>Select EFT if the fund source uses electronic funds transfer to send disbursement funds.</td></tr>
<tr><td>Overpayments</td><td>This option applies to fund source types Cash and Other only. It does not apply to grants, loans, or scholarships.

Select one of the following options for overpayments received for the fund source:

• Apply to First - The overpayment amount is applied to the next scheduled payment.
• Apply to Last - The overpayment amount is applied to the last scheduled payment.</td></tr>
<tr><td>Interest Charges</td><td>Select interest charges for the fund source.</td></tr>
</table>

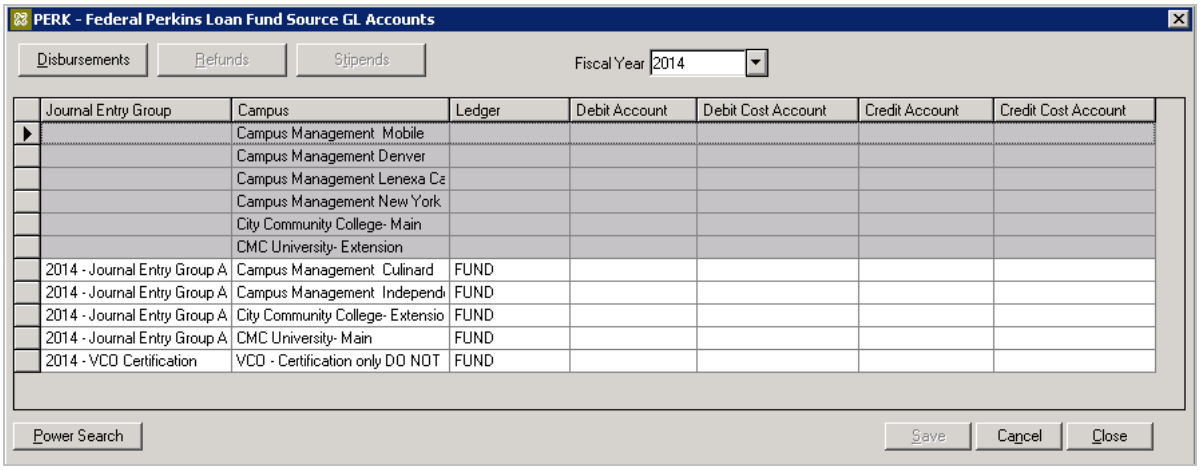
Field	Description
Recalculate Interest at time Payment is made	Select this option to allow CampusNexus Student to recalculate the interest at the time the payment is made when the Fund Source is Cash or Other.
Auto Create Payment Schedule (button)	This option is available only if a system registry key for this feature is enabled. Contact Anthology Inc. for more details. This option allows course registration through Portal to be linked to the creation of scheduled disbursements. By selecting this option, system administrators can configure fund source types (payment methods) of Cash, Other, and Scholar for students to select from to pay for a class via Portal. When this option is selected, the Payment Schedule Option button is enabled. This option allows system administrators to configure specific due dates of the scheduled payment for the fund source types of Cash, Other and Scholar. The options for due dates include specifying the number of (X) days before a course start date, after a course start date, before a term start date, or after a term start date. When a student selects a fund source type to pay for a class fromPortal, CampusNexus Student creates an award with a single scheduled disbursement for that course, fund source, and payment type combination. If multiple payment types are selected for a single course, multiple awards are created. Therefore, a separate payment plan for each course and credit card combination can be created. **Note**: Third party agencies, such as Military Tuition Assistance and Corporate Tuition Assistance, are not linked to a credit card. These agencies have a payment plan with a scheduled disbursement with no associated credit card. The Remaining Balance to Schedule by Course report displays the amounts remaining to schedule for each student by course.
Comments/Contact	
FA G/L Fund	Select the FA G/L fund for the selected fund source. Transactions affecting this fund source will be posted in the FAGL accounts to which this fund source is related. See FAGL Funds.
Comments	Enter any comments to further describe the fund source.
Receipts Comments	Enter any comments to be printed on the Notification of Receipt.
Refund Payable To	This field is used when printing refund checks from a fund source where the type is Grant or Pell. The first line of this field is displayed on the check and the check ledger. Alternate Payee, Check Payee.
Fund Source Contact Information	Specify the address and telephone number of the fund source contact person.
Noel Levitz Properties	

Field	Description
This tab is enabled when the following features are activated: • Student Financial Aid Awarding (Daily > Automated Processes > Configuration > Process Activation > Setup Automation by Campus > Student Financial Aid Awarding (select check box)) • Noel Levitz Integration (Daily > Automated Processes > Configuration > Student Financial Aid Awarding > Settings and Triggers > Activate Noel Levitz Integration (select check box)) for selected Campus(es).	
Community Service Required	Select this option for fund sources requiring a service component for reporting.
Title VII Eligible	Select this option for fund sources to be designated as Title VII funding.
Source	Select the fund source.
Basis	Select the basis for the award.
Funding	Specify if the award is funded or not funded.
Award Type	Specify the award type as work, loan, or gift.

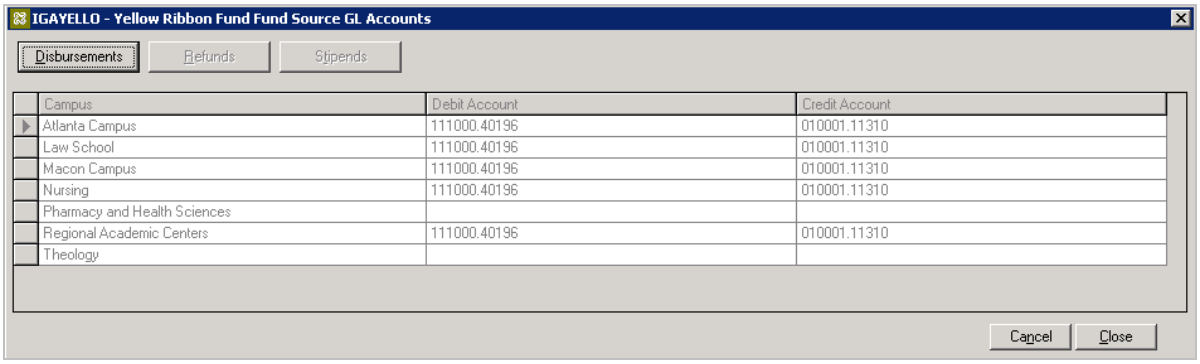
Fund Source GL Accounts/Refunds/Stipends

Institutions can set up a different GL Account numbers for handling disbursements, refunds, and stipends. Debit and Credit accounts can be designated for each fund source and campus to be used when posting refunds. If the GL Account is not specified for the Refund or the Stipend, the GL release uses the GL Debit/Credit accounts associated with the Bank Account from which the checks are written.

The Fund Source GL Accounts form contains the **Disbursements**, **Refunds**, and **Stipends** buttons. When you click one of the buttons, CampusNexus Student displays the list of accounts for each campus for the fund source. The form lists all campuses to which you have access.



Note: When CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll, the forms display fund source GL Accounts in read-only mode. Fund Source GL Accounts for Disbursements, Refunds, and Stipends forms are configured in CampusNexus Finance, HR & Payroll.



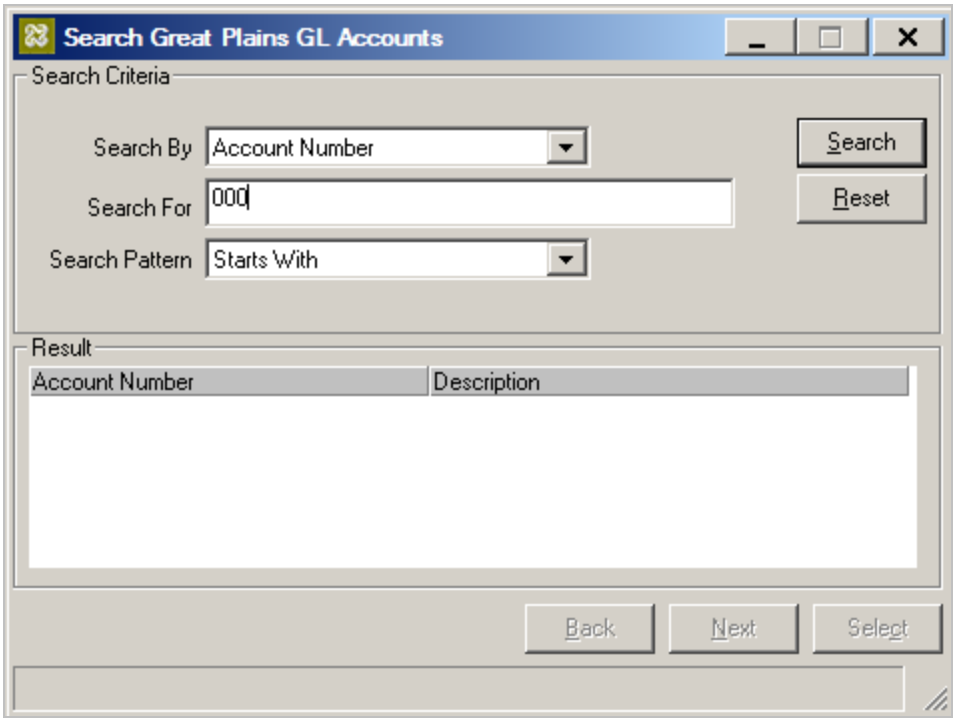
For each campus, enter a **Debit Account** and a **Credit Account**. Click **Save** to save any changes and **Close** to close the form. The business rules for entering GL account numbers on this form are the same as for the GL Link account setup.

Note: By default, Refund and Stipend Credit/Debit account numbers are the same. Click **Stipends** to enter different debit and credit account numbers for use with stipends. These account numbers are treated the same way as refunds, subject to the same verification and reporting criteria and limitations. If you do not enter new, valid account numbers for stipends, the old functionality stays in place where refund and stipend account numbers are the same. The exception to the verification process is in Export to GL-Other, where account number validation does not occur.

- If the Great Plains search feature is enabled, select a row, and click the **Great Plains Search** button to search for Debit Account or Credit Account numbers in the Great Plains GL.

  a. In the Search Great Plains GL Accounts form, click the **Search By** list. Search for GL Accounts using the **Account Number** or **Description**.

  Note: These searches also return Stipend Account information when you have set up separate debit and credit account numbers for stipends.



  b. In the **Search For** field, enter the account number or description.

  c. Specify the **Search Pattern**. The Search pattern works as follows:

- “Starts With” finds an exact match on data that starts with the characters you specify.

  Enter dashes when using this method. For example, if you have a mask that uses ###-####-## and you enter 0000, you will not get any matches. You must enter 000- or 000-0 to get matches, where the first four digits in the account number are zeros.

- "Contains" finds any value that contains what you have entered.
- "Wildcard" searching uses % for any string that follows what is entered. The "_" only replaces a single character.
- "Exact Match" must contain everything you enter. There cannot be additional characters before or after what was entered. If you are not sure of the exact wording, choose “Contains”.

d. Click **Search**. All GL Accounts that meet the specified criteria are displayed in the result grid.

   Based on the value specified in the Max GP GL Account Search field, the results grid displays the data in one page or across many pages. If there are more records than the default number of rows, CampusNexus Student displays:

   - Number of records displayed.
   - Total number or records matched.
   - A Next button to display the next records matched.

e. Double-click the applicable row, or click **Select** to add the account details to the Debit Account or Credit Account field.

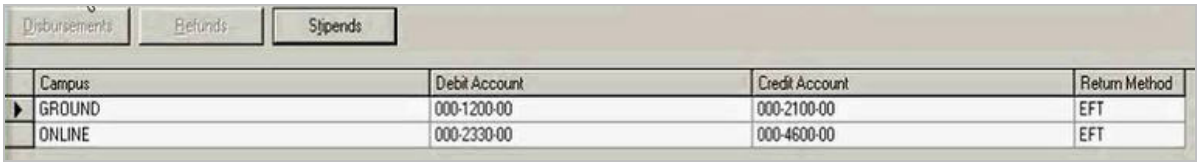
f. Click **Save**. CampusNexus Student saves all records for all campuses that use Great Plains, that contain both a valid Debit and Credit Account or both the Debit and Credit accounts are blank. An error message is displayed if any campus that uses Great Plains is using an incorrect Debit and/or Credit account.

   The **Reset** button on the Search GP GL accounts form clears the fields for a new Search.

Note: The form displayed for **Refunds** includes a **Return Method** column that can be used to configure the return method for the campus and fund source in question. Possible values are Check, Master Check, EFT, ACH, Credit Card, and Net. For additional information, see Default Return Method Hierarchy.

The possible Return Methods for **Stipends** are Check, EFT, ACH and Net.

Initially, Stipend Accounts are populated with the same values as Refund Accounts, so that institutions who do not want to separate refunds and stipends do not have to make any changes. If institutions elect to use different account numbers for stipends, they change the account here.



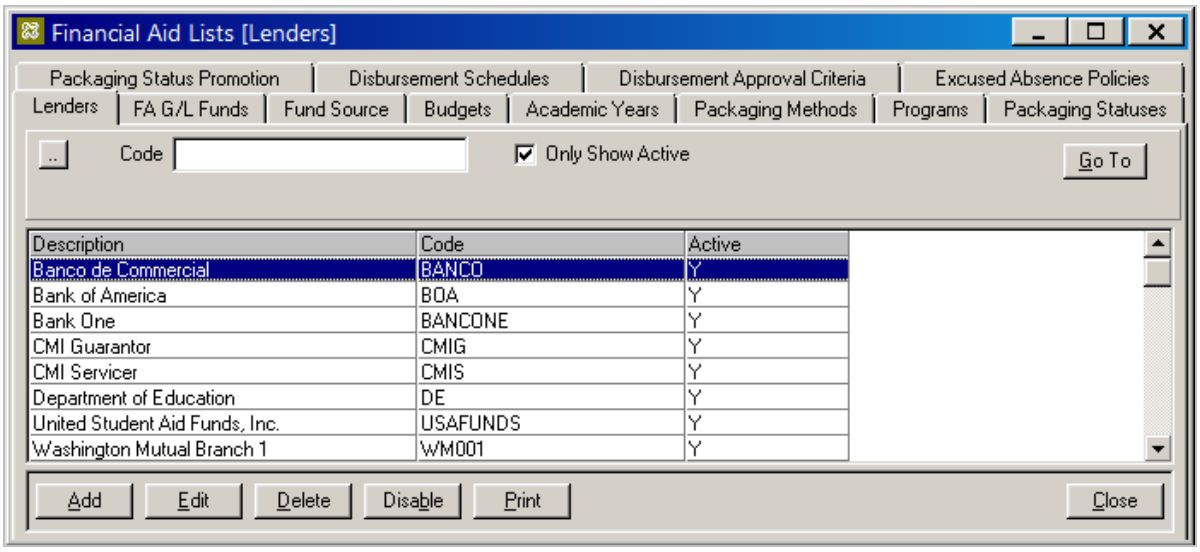
Financial Aid Lists [Lenders]

Use the Financial Aid Lists [Lenders] form to set up loan providers, loan servicers, and loan guarantors. Enter the demographic information for each of the lenders used by your students. Be sure to include loan origination fees and interest rates on the Fees & Interest Rates tab for lenders *other than* the Department of Education (Direct Loans).

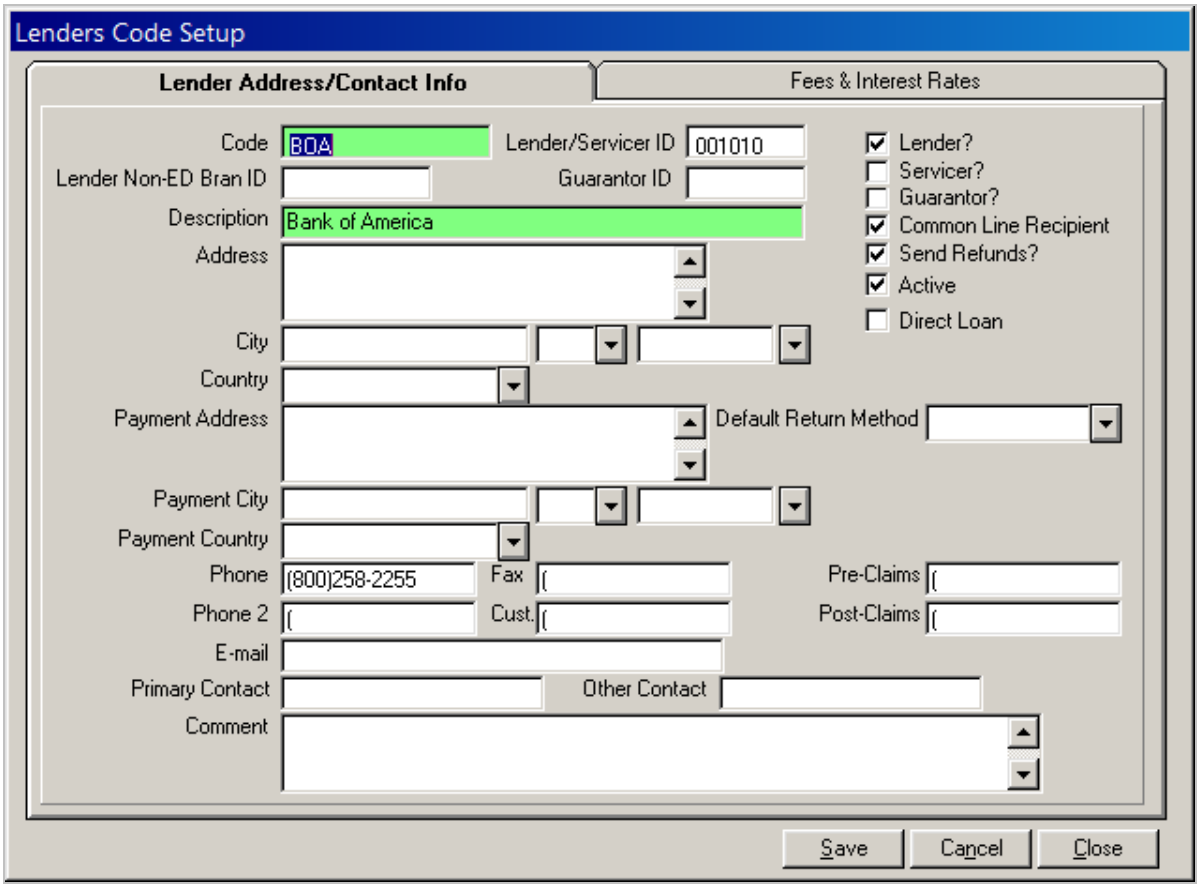
Refer to the Direct Loan Setup form to set up Direct Loan origination fees and interest rates for lenders through the Department of Education.

To add or edit a list of lender codes:

1. Navigate to **Lists** > **Financial Aid**. The Financial Aid Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Lenders**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Lenders Code Setup form is displayed.



6. Specify appropriate options. See Field Descriptions.

   If the lender is the Department of Education under the Direct Loan Program, the fees and interest rates must be configured in the Direct Loan Setup form. Otherwise click the Fees and Interest Rates tab and follow the instructions below.

7. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Field Descriptions

Field	Description
Lender Address/Contact Info tab	
Code	Specify a unique code.
Lender Non-ED Bran ID	Specify a unique 4-character identifier assigned (by an entity other than ED) to the lender's branch office. This field is enabled only if the Lender? check box is selected.
Guarantor ID	Specify a unique 3-character identifier This field is enabled only if the Guarantor? check box is selected.
Lender?	Select the check box if it applies.

Field	Description
Servicer?	Select the check box if it applies.
Guarantor?	Select the check box if it applies.
Send Refunds?	Select the check box if the refunds should be sent using change transaction records.
Active	Select the check box to designate the record as active.
Direct Loan	Select the check box if this is the lender record for Direct Loans. If so, it will be the Department of Education (ED) record.
Description	Specify a description of the lender.
Address	Enter the address of the institution.
City/State/Postal Code	If you enter the Postal Code first, CampusNexus Student fills in the City and State fields.
Country	The field defaults to the country of your default (login) campus. If necessary, select another country.
Payment Address	Enter the address where the loan payments are sent.
Default Return Method	Select Check, Master Check, EFT, or Net. For additional information, see Default Return Method Hierarchy.
Payment City/State/Postal Code	If you enter the Postal Code first, CampusNexus Student fills in the City and State fields.
Payment Country	The field defaults to the country of your default (login) campus. If necessary, select another country.
Phone	Enter the primary telephone number for the institution.
Fax	Enter the fax number for the institution.
Phone 2	Enter the secondary telephone number for the institution.
Cust.	Enter a telephone number for a customer service representative.
Pre-Claims	Enter the number of the Pre-Claims office (if different from other phones).
Post-Claims	Enter the number of the Post-Claims office (if different from other phones).
E-mail	Enter an e-mail address for this institution.
Primary Contact	Enter the name of the Primary Contact person.
Other Contact	Enter the name of the Other Contact person.
Comment	Enter any comment.
Fees & Interest Rates tab	

Field	Description
Loan Fees #1 / #2	Enter up to two fees that this lender charges when processing loans. When a loan is originated, if both fees are present here, they are both charged to the borrower.
Percentage / Flat Amount	Select Percentage to enter a fee based on a percentage of the gross loan amount or Flat Amount if the value you entered is in dollars and applies to all loans equally.
Description	Enter a description of the fee.
Interest Rate	Enter the interest rate the lender charges for loan repayment. The value in this field and the value in the Default # of Monthly Payments field are used to calculate the estimated monthly payments in the Exit Interview report.
Default # of Monthly Payments	Enter the default number of monthly payments required to repay a loan offered by this lender.
Servicer Code	Enter the Servicer Code for the default Servicer that this lender uses.
Guarantor Code	Enter the Guarantor Code for the default Guarantor that this lender uses.

Financial Aid Lists [Packaging Methods]

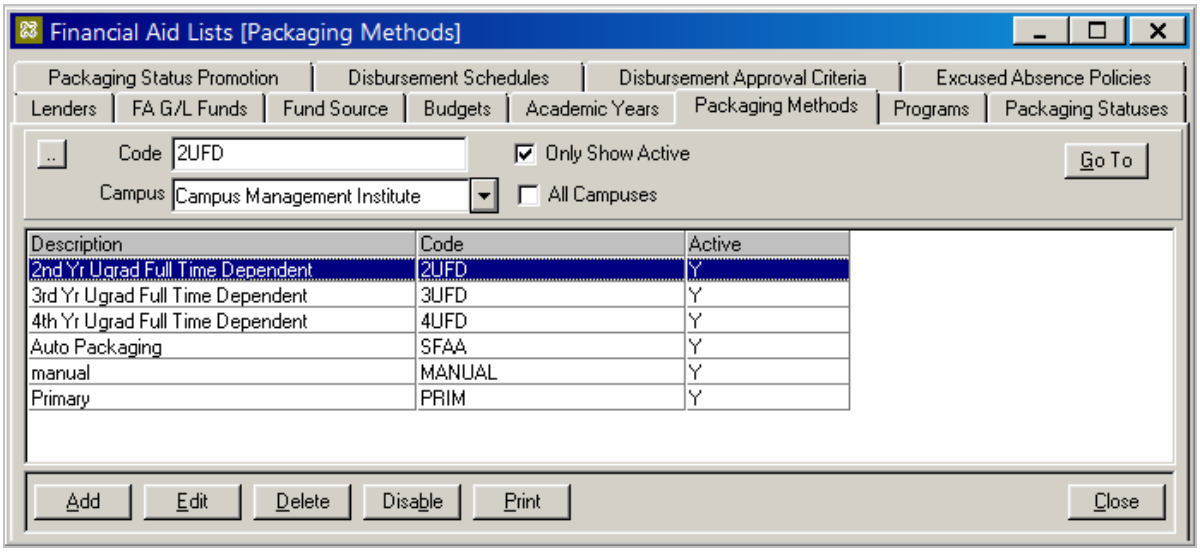
Use the Financial Aid Lists [Packaging Methods] form to create a list of packaging methods used at your institution. Packaging methods are guidelines for planning financial aid for your students. CampusNexus Student's automated packaging feature depends on these tables. When you package a student, you select one of these tables to be used by the automatic packager. When the time comes to consider the needs of individual students, the Financial Aid Officer can make adjustments to the student's FA packaging plan.

Since there is always a variety of circumstances to consider when a student requires financial aid, you can anticipate that a variety of packaging methods will be required. For instance, it is likely that you want to establish a different packaging method for full time students and part time students. Pell and other grant programs, as well as the various loan programs all have different benefit maximums for full and part time students. You may want different packaging parameters for first year, second year, third year, fourth year, and graduate students. Maximum benefits also vary according to the student's progress toward the completion of their program of study.

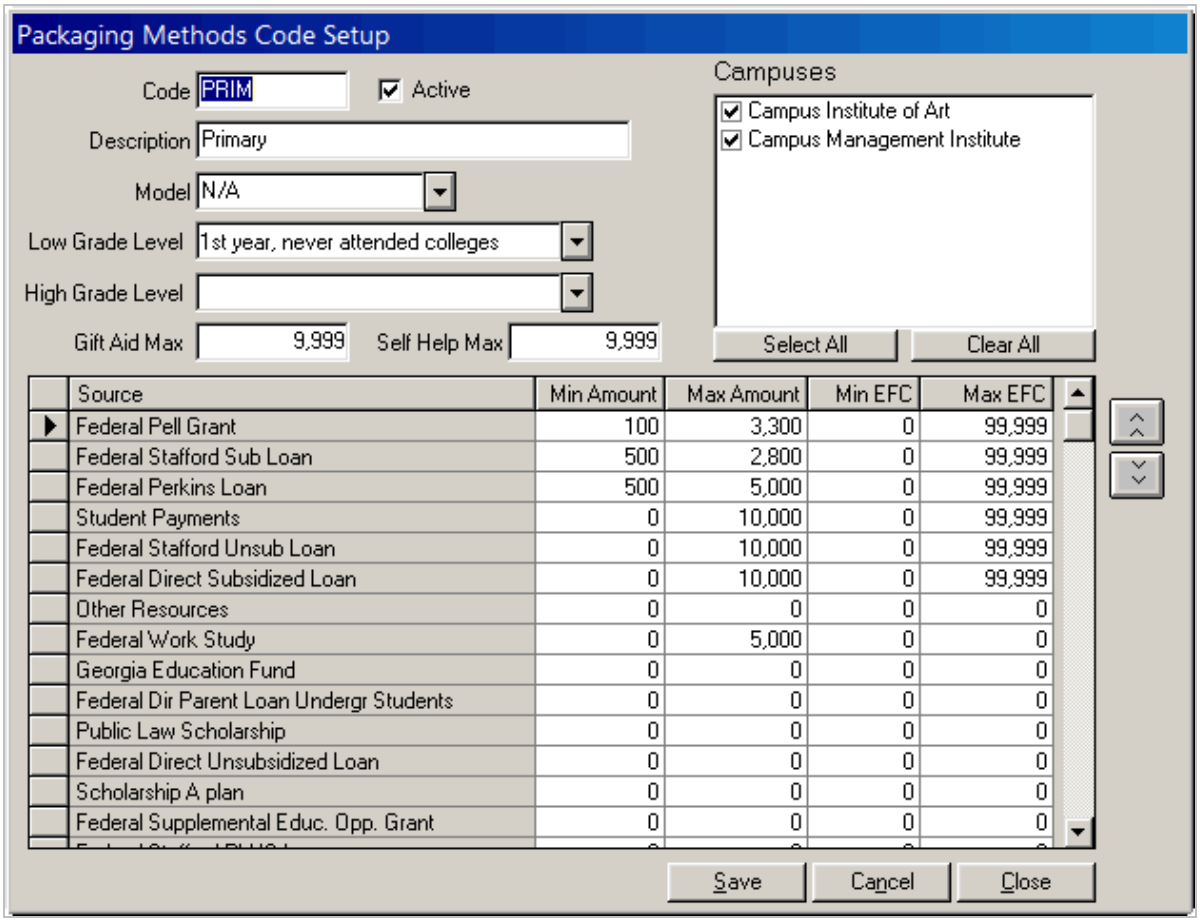
Another factor to consider are the dependent and independent models as defined by the Department of Education. Dependent students qualify for a different level of benefits than do independent students. In your institution's environment, you may identify additional factors that have to be considered in your own packaging methods. All of these factors contribute to the setup of packaging methods for your financial aid programs.

To add or edit a list of financial aid packaging method codes:

1. Navigate to **Lists** > **Financial Aid**. The Financial Aid Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Packaging Methods**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
6. Click **Add**, or select a record and click **Edit**. The Packaging Methods Code Setup form is displayed.



7. Specify appropriate options. See Field Descriptions.
8. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Field Descriptions

Field	Description
Code	Enter a code for this packaging method that can be easily recognized by your staff.
Active	Select or clear this flag to control the future use of this packaging method.
Description	Enter a descriptive name for this packaging method.
Campuses	Select the campuses to which this packaging method applies. CampusNexus Student allows duplicate packaging method codes within the database; however, duplicate codes are not allowed within a campus or campus group. The Packaging Methods form enables multi-campus selection.
Model	Select Dependent, Independent, or N/A.
Low Grade Level	Select the lowest grade level in your school to which this packaging method applies.
High Grade Level	Select the highest grade level in your school to which this packaging method applies.

Field	Description
Gift Aid Max	Enter the maximum amount of gift aid (Pell Grant, other grants, scholarships) that can be awarded when using this packaging method. If you are doing automatic packaging, CampusNexus Student checks this amount to determine when to stop allocating grants and begin packaging loans.
Self Help Max	Enter the maximum amount of self help (subsidized and unsubsidized loans, other loans, work study, and so on) that can be awarded when using this packaging method. If you are doing automatic packaging, CampusNexus Student checks this amount to determine when to stop allocating loans.
Source	The fund sources in the packaging methods list come from the Fund Source Type list. Arrange the order of the fund sources by clicking the and buttons on the right side of the list. It is important to put the sources in the order in which they will be applied when the student's aid package is implemented, especially if you choose to use the automated packaging feature of CampusNexus Student. It is not necessary to enter data in every fund source. If a source is not applicable in a given packaging method, leave the values for the source at zero. For readability, promote the sources that are used (higher in the list) and demote those that are not used.
Min Amount	Enter the minimum amount that the student can expect from the fund source. Students are restricted from accepting less than the configured minimum amount of a loan fund source for the student's packaging method. CampusNexus Student validates the student's packaging method and the scheduled minimum amount for each fund source against the values configured on this form.
Max Amount	Enter the maximum amount that the student can expect from the fund source. The maximum amount is validated against the amount previously scheduled. If in Portal a user enters a Gross Amount that is not within the minimum and maximum range configured for the loan fund source, CampusNexus Student displays an error message indicating the fund source and the scheduled minimum and maximum amounts the user is allowed to accept.
Min EFC	Enter the minimum expected family contribution amount that the student and his or her family must provide for benefits from this fund source.
Max EFC	Enter the maximum expected family contribution amount that the student and his or her family must provide for benefits from this fund source.

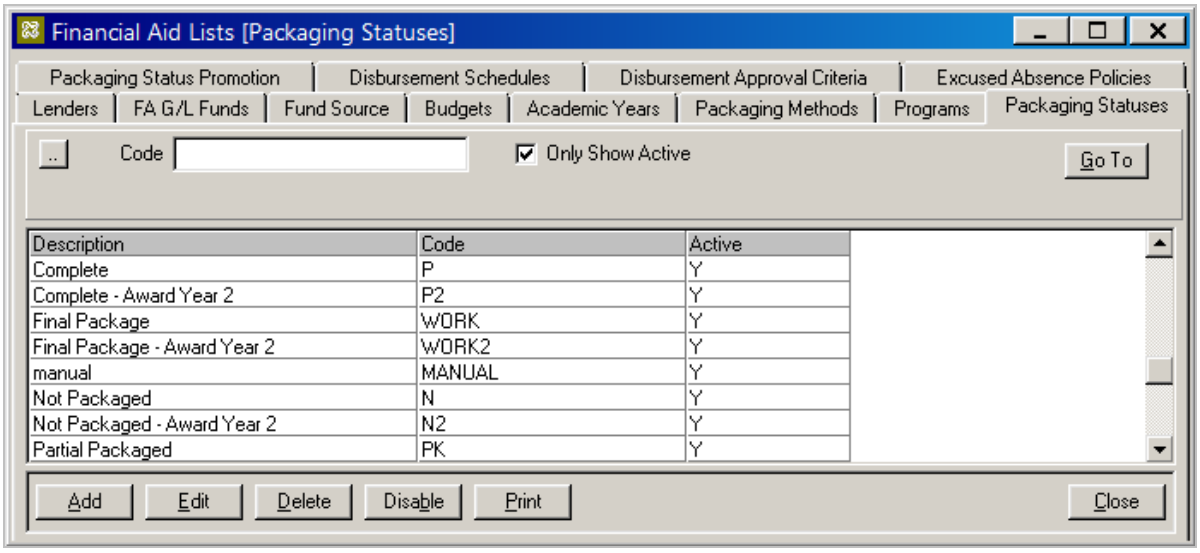
Financial Aid Lists [Packaging Statuses]

Use the Financial Aid Lists [Packaging Statuses] form to create a list of codes for financial aid packaging statuses. These statuses are indicators of the student's progress through the financial aid process. Each student will have a packaging status for each academic year.

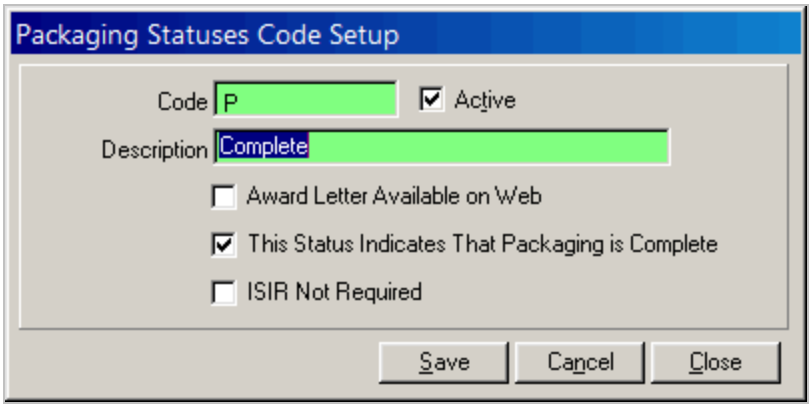
A student's financial aid packaging status is displayed when you select the student and navigate to View > Financial Aid > Packaging. For detailed information on packaging, refer to Packaging.

To add or edit a list of financial aid packaging status codes:

1. Navigate to **Lists** > **Financial Aid**. The Financial Aid Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Packaging Statuses**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Packaging Statuses Code Setup form is displayed.



6. Specify a unique **Code**.
7. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
8. Enter a **Description**.
9. Select **Award Letter Available on Web** to cause the award letter to be viewable on the web automatically (ready for student viewing) when this status is achieved.
10. Select **This Status Indicates That Packaging is Complete** if this is the appropriate code for the packaging complete status.
11. Select **ISIR Not Required** to set the packaging status for students making cash payments for the program.
12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Financial Aid Lists [Packaging Status Promotion]

Note: For the latest content about FAFSA, ISIR and COD processing, access Regulatory Help.

Use the Financial Aid Lists [Packaging Status Promotion] form to add or edit promotion requirements for each packaging status. The information on the grid is saved in the FaPackStatusPromoLevel table. See Configurable Values for Packaging Status Promotion below for descriptions of the grid columns.

On the campus Financial Aid page (Setup > Campus Locations > Campuses > Financial Aid), you can select a "Package Status Promotion" code. The value is saved to SyCampus.FaPackStatusPromoID. The list of available methods is from the FaPackStatusPromo table which is maintained with this list.

When updating a financial aid package (View > Financial Aid > Packaging > Edit), you can select a values from a list of packaging statuses. The form shows only packaging statuses where "Allow Manual Change" is selected if the campus has a Packaging Status Promotion Method defined (SyCampus.FaPackStatusPromoID is not null).

The current packaging status from the FaStudentAY record (FaStudentAy.FaPackStatusID) is displayed on the list regardless of how the "Allow Manual Change" flag is set.

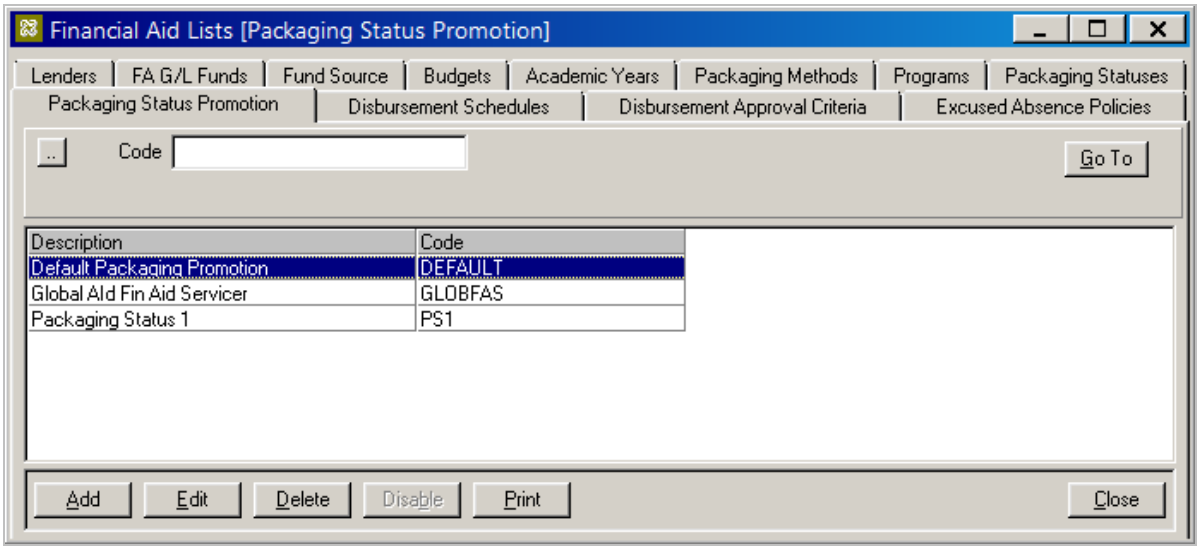
Auto Status Promotion

CampusNexus Student runs a job every two minutes during which it evaluates each financial aid package touched since the last run and determines which packages to update automatically. The following actions can result in a financial aid package's status being automatically recalculated and updated:

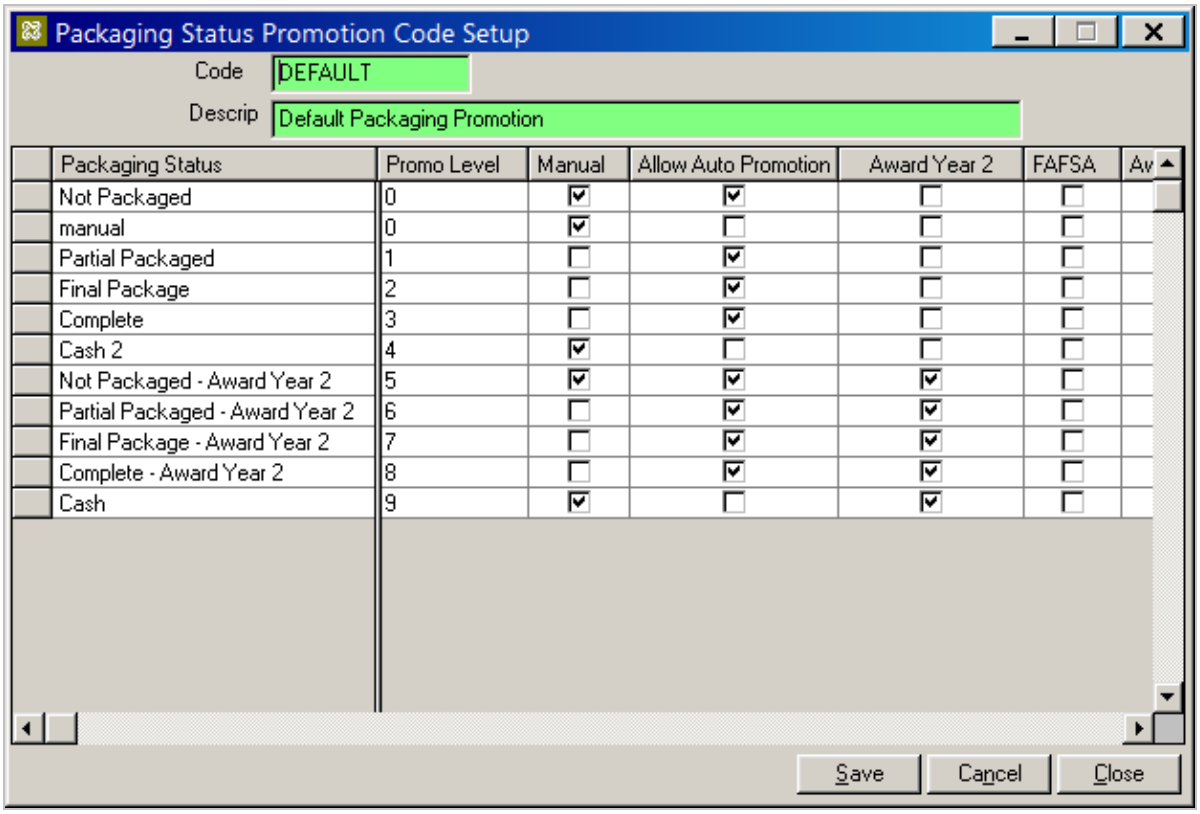
- User clicks Save in the Financial Aid Academic Year form.
- User changes the ISIR Verification Status and clicks Save on the Financial Aid Packaging form.
- User clicks Save after adding or editing a Funding Source on the Financial Aid Packaging form.
- User Deletes a Funding Source on the Financial Aid Packaging form.
- User Deletes a Funding Source on the Payment Schedule Setup form.
- User clicks Finish in the Approve Packaged Aid form.
- User Saves or Deletes a Document Attachment in the Document Attachment form.
- User clicks Save in the Document List Details form.
- User clicks Save or selects Yes to Ready to Send in the FAFSA Results form.
- User Imports an ISIR file on the Import ISIR File form.
- User clicks Save in the Document Tracking form.
- User clicks Save in the Attendance Recording form.
- User adds an Award Year 2 in the drop-down list on the Financial Aid Academic Year form.
- User performs Scantron procedure in the Scantron Services form to update attendance.

To add or edit a list of packaging status promotion codes:

1. Navigate to **Lists** > **Financial Aid**. The Financial Aid Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Packaging Status Promotion**.



3. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Click **Add**, or select a record and click **Edit**. The Packaging Status Promotion Code Setup form is displayed. Use the horizontal scroll bar to see the entire list of check boxes.



5. Specify a unique **Code**.
6. Enter a **Description**.

7. For each Packaging Status, select options in each column. See Field Descriptions.
8. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Field Descriptions

Field	Description
Packaging Status	Read-only: FaPackStatus.Descrip. You can create two sets of packaging statuses on Lists > Financial Aid > Packaging Statuses. One set of statuses applies to the first award year evaluation criteria. The second set applies to cross over students for the second award year packaging.
Promo Level	The promotion level determines the order in which statuses are evaluated for auto promotion. Statuses are evaluated from the highest promotion level to the lowest promotion level. A promotion level can be 0 or greater. If more than one status is set with the same promotion level, one cannot predict which is evaluated first. As statuses are evaluated from highest to lowest promotion Level, the first status encountered for which the package satisfies the selected criteria (see FAFSA, Award Letter, etc.) is the status to which the package is automatically set. If two statuses had the same criteria selected, and a package satisfies those criteria, the one with the higher promotion level is one that the package would be set to. Example usage of promotion level: • New (Not Packaged) = 1 • Partially Packaged = 2 • Packaged = 3.
Manual	This indicates if you are able to set this packaging status on the Student Academic Year form.
Award Year 2	Select this check box if the status belongs to the second award year.
Allow Auto Promotion	This indicates if this status is used in auto promotion. If this option is not selected, the remaining columns have no meaning and should be cleared. For a package to be set automatically to a new status, it must be currently set to a status that participates in auto promotion, as determined by the Allow Auto Promotion flag. The package can be set only to those statuses that are part of auto promotion. The columns from "FAFSA" on are conditions that can be required for auto promotion to select a status to which the package will be set. A status may be flagged as participating in auto promotion, but have no conditions required. In this case that status will never be selected as a status for a package (unless Reevaluate is not selected); however, auto promotion allows packages to be changed to another status from this status. **Note**: When a package evaluated for auto promotion meets none of the conditions specified for statuses that require conditions, and a new status has not been established as a result of the Reevaluate flag, the package is set to the NEW status.
FAFSA	Indicates that a FAFSA (EFC) must be calculated before the packaging status can be set.
Award Letter	Indicates that the award letter must be printed before the packaging status can be set. The FaStudentAY.AwardNoticePrinted is evaluated to determine if the award letter was printed.

Field	Description
ISIR Received	Indicates that a valid ISIR must be on file. The FaStudentPell.ISIRDateRecv is checked to see if a valid ISIR was received. The FaStudentPell.AwardYear must match the FaStudentAY.AwardYear1. The date can be anything other than a null value to satisfy this condition. The ISIR must not have Reject Codes on it to be considered valid. CampusNexus Student checks FaStudentPell.RejectCodes to determine this.
Verify Cleared	Indicates that if validation is required on the ISIR – it must be resolved FaStudentPell.VerifStatus <> "S". The FaStudentPell.AwardYear must match the FaStudentAY.AwardYear1 and the status must be anything other than "S" for this condition to be met.
Aid on File	If any FaStudentAid rows are found for the FaStudentAyID where the amount packaged is greater than zero, this condition is met. The Packaging Status Promotion Process applies a tolerance to the four packaging status promotion attributes listed below. The RBS tolerance level can be configured in the Tolerance Amount field on the Campus Information Setup form on the Financial Aid tab. The maximum tolerance limit is $1000. If the Tolerance Amount field is zero or remains blank, no tolerance is applied.
Aid > COA	If the sum of FaStudentAid.AmountPackaged is greater than or equal to the FaStudentAy.CostofAttend, this condition is met.
Aid > Inst Costs	If the sum of FaStudentAid.AmountPackaged is greater than or equal to the FaStudentAy.InstitutionalCharges, this condition is met.
Approved > COA	If the sum of FaStudentAid.AmountPackaged where the status equals "A" is greater than or equal to the FaStudentAy.CostofAttend, this condition is met.
Approved > Inst Costs	If the sum of FaStudentAid.AmountPackaged where the status = "A" is greater than or equal to the FaStudentAy.InstitutionalCharges, this condition is met.
Docs	All documents specified in the document list (CmDocTypeListID) are evaluated against the student's document folder. If the document(s) exist, the document must have a status that is approved for the condition to be met. If an Award Year specific document is defined in the document list and that document is in the student's document folder, the document is evaluated based on the Award Year defined on the document folder. The document must have a status that is approved for the condition to be met for the Award Year being evaluated.

Field	Description
Document List	If the "RequireFADocsReceived" column is 1 (true), select the document list to be used to verify that all documents are on file. This column contains a drop-down list of all the document lists that have been defined for financial aid. Lists > Contact Manager > Document Lists. Financial Aid automatic package status promotion evaluates the document list to see if the student has all listed documents Assigned and On File/Approved. • If the student is assigned any of the documents in the list and the documents are also On File/Approved, the packaging status is automatically changed to the next packaging status level (as set up in Lists > Financial Aid > Packaging Status). • If a student is Assigned any document in the document list, and one or more of the assigned documents is not On File, the packaging status is not automatically changed to the next packaging status level. • If the document is Award Year specific, the document is evaluated for the Award Year specified in the student's document folder. • If the document is Assigned and On File/Approved, the packaging status is automatically changed to the next packaging status level if the Award Year being evaluated matches the Award Year specified for the document. • If the Award Year specified for the document does not match the Award Year being evaluated, the packaging status does not promote. Double-click in the list box to select a document list or to close the list box.
Fund Source Types	Use this feature to set up a Package Status Auto Promotion scheme. If a student's financial aid package is made up of certain "cash-like" types, such as direct loans, you can specify the funding sources. Whenever the student's package, is re-evaluated, the Package Status is automatically updated if the funding sources include funding from ONLY the types specified in this form. Select the check box in this column to enable functionality in the Selected Fund Source Types list in the column immediately to the right. If you do not select this check box, you cannot choose a fund source(s).
Selected Fund Source Types	If the Fund Source check box to the left of this column is selected, click inside the Selected Fund Source Types field, and click . CampusNexus Student displays a list of all available fund sources. Use the check boxes to select all that apply. Click OK to save your selections and return to the Packaging Status Code Setup form. If you click Cancel, your selections are saved before CampusNexus Student returns to the Packaging Status Code Setup form.

Field	Description
Reevaluate	The Reevaluate flag sets "ratchet-points" below which the auto promotion logic does not promote packages. A reevaluate=0 means that even if the package no longer qualifies for this status, auto-promotion does not change the package's status from a higher promo level/status to one below this status that has reevaluate=0. Once a package reaches a status/promo level where the Reevaluate check box is not selected, it never falls below that promo level/status automatically. **Note**: Normally, statuses that are flagged to participate in auto promotion but that have no conditions specified for them are statuses that a package can be changed from, but not to. However, if such a status also does not have the Reevaluate option selected, a package that no longer meets any conditions specified by other statuses would be set to this status.

The table below illustrates a Packaging Status Promotion setup that applies to the different packaging statuses.

Packaging Status Promotion Setup

Packaging Status	Promo Level	Manual	Allow Auto Promotion	Award Year 2	FAFSA	Award Letter	ISIR Rcvd	Aid on File	Docs
Not Packaged	0	X	X						
Partial Packaged	1		X		X				
Final Package	2		X		X	X	X		
Complete	3		X		X	X	X	X	X
Cash	4	X							
Not Packaged - AY 2	5	X	X	X					
Partial Packaged - AY 2	6		X	X	X				
Final Package - AY 2	7		X	X	X	X	X		
Complete - AY 2	8		X	X	X	X	X	X	X
Cash 2	9	X		X					

Note:

Two sets of statuses are necessary to differentiate crossover students by the packaging status.

- The first set is used for the first award year defined on the academic year.
- The second set is used to determine the packaging status for crossover students where a second award year is defined on the academic year.

The two statuses work independently of each other therefore, it is not necessary to ensure all required elements for Award Year 1 be satisfied to allow the statuses for Award Year 2 to promote.

Financial Aid Lists [Programs]

Administrators can use the Financial Aid Lists [Programs] form to set up the FA parameters for your institution's program versions.

Programs must be set up under Lists > Academic Records > Programs before they appear on this list. You cannot add, delete, or disable programs on this list.

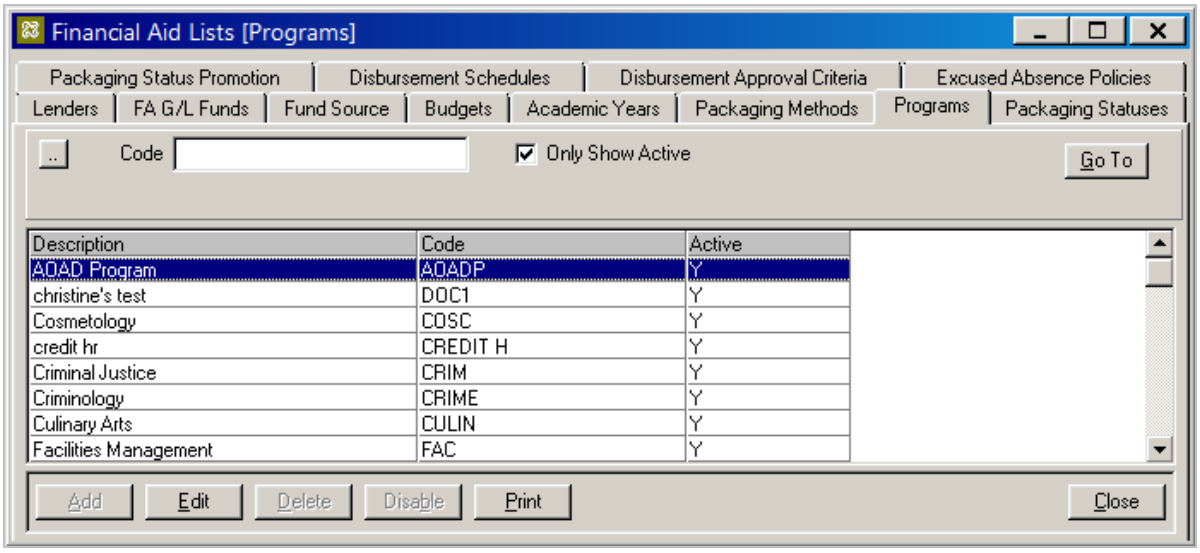
The Financial Aid Lists [Programs] form captures the total program costs and the number of terms in an academic year (if applicable). The total program costs fields are displayed on this form regardless of the billing method specified for the program. These fields are: Total Tuition Cost, Total Books/Supplies Cost, and Total Other Cost. The values of these fields come from AdProgramVersion.TotalTuitionCost, TotalBooksSuppliesCost, and TotalOtherCost tables.

The enrollment status (full time, three-quarter time, half time, less than half time, and so on) also plays a role in the program setup.

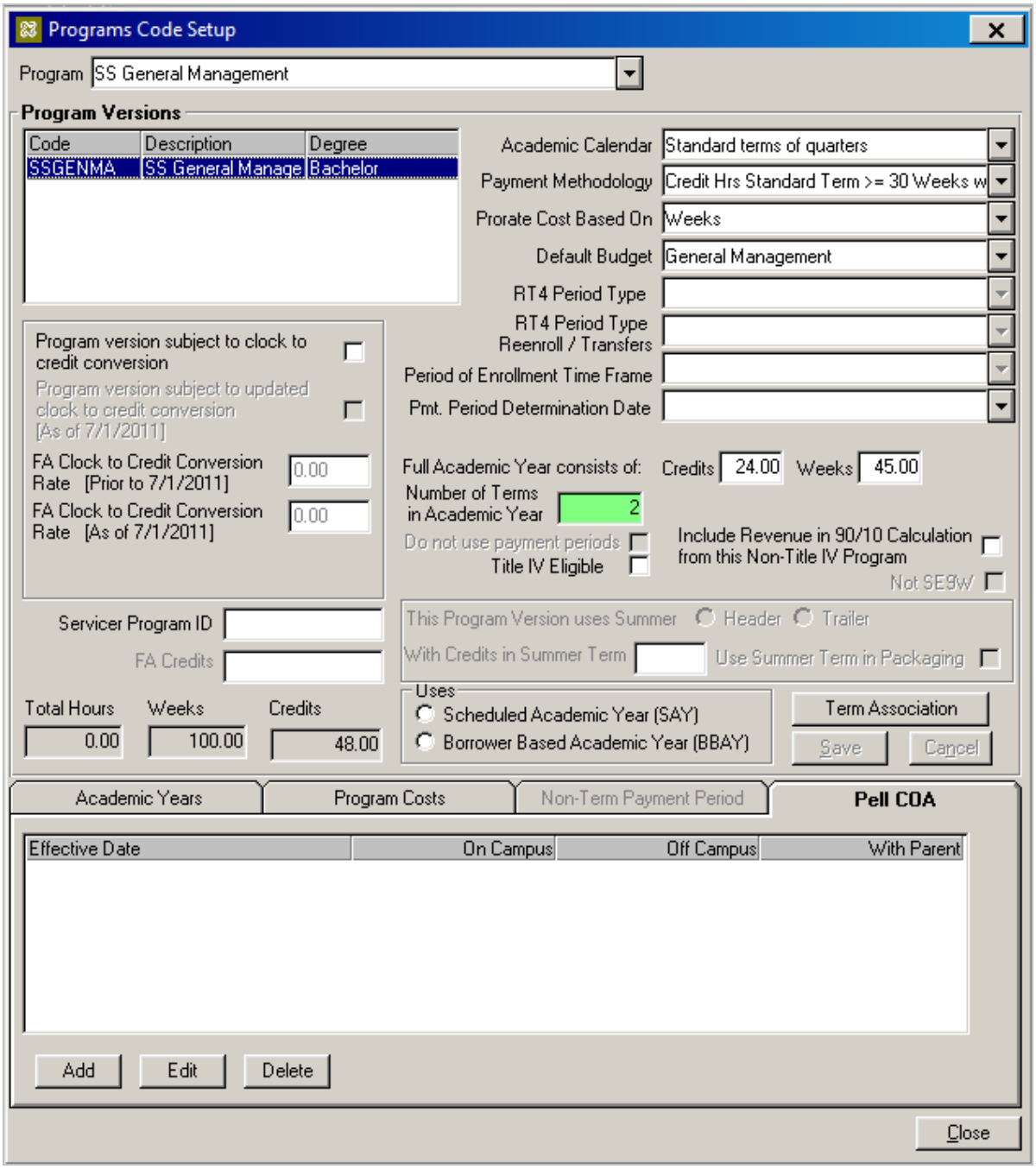
Note: An academic year is generally equivalent to the freshman, sophomore, junior, or senior year. In institutions where part time students are admitted, there are variations of the traditional academic years. The Department of Education defines academic years based on the way your institution's terms are set up (semesters, trimesters, quarters, clock hours, etc.).

To add or edit a list of FA program codes:

1. Navigate to **Lists** > **Financial Aid**. The Financial Aid Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Programs**.



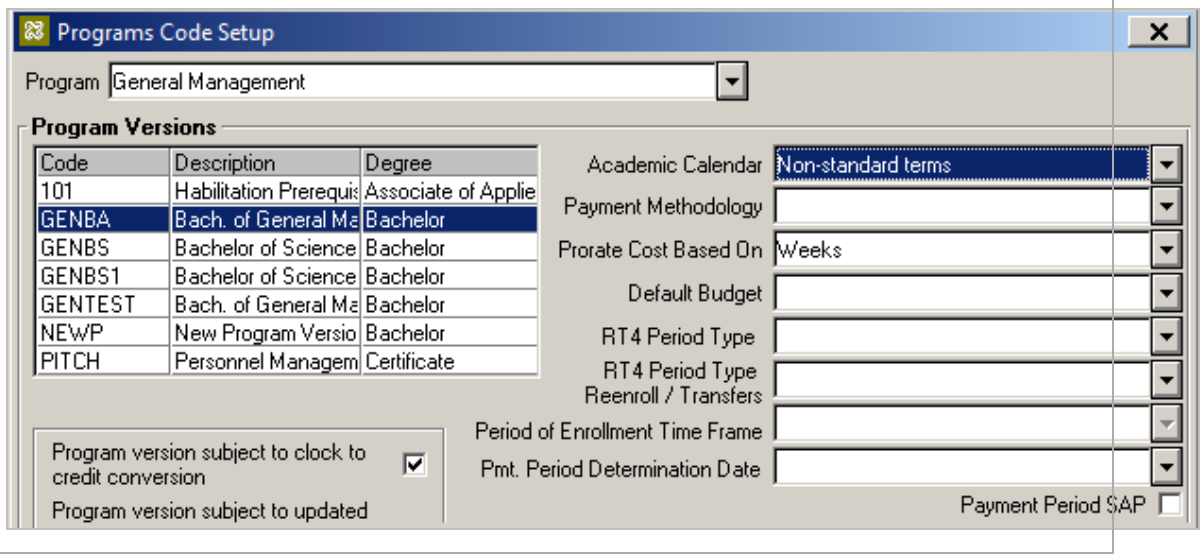
3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Programs Code Setup form is displayed.



6. Select the **Program** and **Program Versions**. Version Information is displayed for your selections.
7. Specify data for the program version. See Field Descriptions.

Field Descriptions

Field	Description
Program	Select a program.

Field	Description
Program Versions	Select a program version to view the related data on the form. If you edit program version information on the Programs Code Setup form, click **Save** before closing the form.
Total Hours	Total contact hours for the program version.
Weeks	Total weeks of instruction for the program version.
Credits	Total credits required to complete the program version.
FA Credits	The field is used to measure progression and adjust Academic Year and Loan Period sequences if the total FA credits for a program version is different than the Academic Credits. This field is available for programs configured to use Academic Calendar 6 if "Allow Course to be exempt from Progression" is enabled.
Academic Calendar	Select one of the following options: • 1 Credit hours - non-standard terms • 2 Credit hours - standard terms of quarters • 3 Credit hours - standard terms of semesters • 4 Credit hours - standard terms of trimesters • 5 Clock hours • 6 Credit hours without terms These options correspond to calendar options required by the Department of Education. A default academic calendar for each campus is set up under **Setup** > **Campus Locations**. **Note**: If **Academic Calendar 1 - Non-standard terms** is selected, the **Payment Period SAP** check box only is displayed if Term or Cumulative AND Payment Period is selected as the SAP mode for Academic Calendar 1. When the Payment Period SAP check box is selected on the Program (Lists > Financial Aid > Programs), SAP based on Payment Period evaluates students in those programs. See also SAP System Level Configuration and Satisfactory Academic Progress. 

Field	Description
Payment Meth-odology	Select an option from the list. • 1 – Credit hour with standard terms in which Fall through Spring terms equal or exceed 30 weeks, or equal or exceed academic year with waiver (AC: 2,3,4) • 2 – Credit hour with standard terms in which Fall through Spring terms are less than 30 weeks without waiver (AC: 2,3,4) • 3 – Credit hour with standard or non-standard terms (AC: 1-4) • 4 – Clock hour or Credit Hour without terms (AC: 5,6) • 5 – Nonresidential portion of programs offered by correspondence without terms (AC: 1-4,6) The options on this list vary depending on the Academic Calendar selected above. A default payment methodology for each campus is set up under **Setup > Campus Locations**.
Prorate Cost Based On	Choose whether the tuition cost for budgets shall be calculated using Weeks or Credits when the budget's 'Institutional Charges Calculation Method' is equal to 'Calculate from Total Program Cost'.
Default Budget	Select a default budget for the program version from a list of the budgets configured. The Default Budget consists of institutional costs, but not housing costs. The COA is the Default Budget plus the costs of housing, based on Housing Status.
RT4 Period Type	This list is enabled if the program version has a non-traditional academic calendar (non-standard terms, clock hours or credit hours without terms). The Return of Title IV Funds calculation is always calculated for a defined time frame. This defined time frame is the Title IV payment period or period of enrollment the student was attending when the student withdrew from school.
RT4 Period Type Reen-roll / Trans-fers	This list is enabled if the program version has a non-traditional academic calendar (non-standard terms, clock hours or credit hours without terms). The Return of Title IV Funds calculation is always calculated for a defined time frame. This defined time frame is the Title IV payment period or period of enrollment the student was attending when the student withdrew from school.
Period of Enrollment Time Frame	This list is enabled for non-traditional academic calendars with a period of enrollment type. The start and end dates can be based on the program (P) or the academic year (A). The Period of Enrollment start and end dates are validated as follows: • The period end date must be greater than the period begin date. • The period begin date must be greater than or equal to the student's start date. • The period end date must be less than or equal to the student's expected graduation date.

Field	Description
Pmt. Period Determination Date	Select one of the following options: • LDA • Date of Determination • NSLDS Withdrawal Date The selected option determines the date that used to evaluate whether the student has attended a payment period when the student is moved to the "Permanent Out" Status category. It automatically generates an origination change to adjust the Loan Period End Date (**Setup > Financial Aid > Direct Loan Setup**). If 'Auto create Loan Period Orig. Changes when student Withdraws or Refunds is posted?' is activated, and a student is withdrawn from a program version, the date value configured for this field is used as the date to evaluate whether the student has attended a payment period after the initial payment period on the Direct Loan. If the student does not show any attendance, an origination change is created to adjust the Loan Period End Date to exclude that payment period from the Loan Period.
Full Academic Year consists of:	**Credits**: Enter the number of credits required in the academic year. **Weeks**: Enter the number of weeks of instruction in the academic year. The Higher Education Reconciliation Act (HERA) provision modifies the academic year definition by reducing the minimum 30 weeks of instructional time for programs measured in clock hours to 26 weeks. The minimum 30 weeks academic year definition remains in effect for term and non-term credit hour programs. **Number of Terms in Academic Year**: Enter the number of terms in an academic year. If you selected Clock Hours or Credit hours without terms under Academic Calendar AND Clock Hr/Credit Hr without terms under Payment Methodology, two additional fields are displayed: • **Number of payment periods:** Enter the number of payment periods for this academic year. • **Title IV Loan payment periods:** Enter the number of Title IV Loan payment periods for this academic year.
Do not use payment periods	For a non-term program version, this check box prevents the creation of payment periods on the academic year. When Academic Calendar 1 is selected, this check box is disabled.
Include Revenue in 90/10 Calculation from this non Title IV Program	Select this check box to indicate that funds received to pay charges for non Title IV eligible programs are included as revenue in the 90/10 calculation. This check box is only enabled for Programs with a Program Version configured with a Program Type of 'Non-Degree' (Lists > Academic Records > Programs > Add/Edit > Versions > Add/Edit > Program Type).

Field	Description
Auto recalculate budgets	This field is enabled for program version configurations that use Academic Calendar 5 or 6. When the program version for the enrollment has "Auto recalculate budgets" selected in conjunction with the budget assigned to the Academic Year configured to "Use Monthly Amounts" and the Institutional Charges Calculation Method is set to "Use Amounts Entered Here", CampusNexus Student can automatically recalculate budget amounts based on instructional weeks (IW) that occur between the Academic Year and Loan Period dates. The amounts on the budget are multiplied by the value contained in the "IW Months" field to populate values in the budget section of the Academic Year. Locked academic years and loan periods should not be recalculated. The program version report accessed from Lists > Financial Aid > Programs can be filtered to only include program versions configured to recalculate the budget so that you can determine program versions enabled for this functionality.
Not SE9W	This field is enabled for program version configurations that use Academic Calendar 1. Select this check box if the program version is Non SE9W. • If this box is selected, Pell will use terms as the payment period • If this box is selected, direct loans will use payment period/loan periods and not terms • If this box is cleared, Pell will use terms as the payment period • If this box is cleared, direct loans will terms as the payment period **Note**: An SE9W program is a credit-hour program with nonstandard terms, all substantially equal in length, and each of those terms is at least 9 weeks of instructional time. Nonstandard terms are classified as substantially equal in length if no term in the loan period is more than 2 weeks of instructional time longer than any other term in that loan period.
Program version subject to clock to credit conversion	Select or clear this check box as required. The default is cleared (No). **Note**: When you select this check box, the Clock to Credit Conversion Rate filters on the Academic Years and Non-Term Payment Period tabs also become available.
Program version subject to updated clock to credit conversion (As of 7/1/2011)	This option is enabled only if you selected **Program version subject to clock to credit conversion**. It allows you to indicate that the program version is also subject to the updated conversion rate for students enrolling into the program (having a Program Version start date) on or after July 1, 2011. Select or clear this check box as required. The default is cleared (No). **Note**: When you select this check box, the updated conversion rate is included in the Clock to Credit Conversion Rate filters on the Academic Years and Non-Term Payment Period tabs. If you do not select this option, the existing Clock to Credit rate that is configured will continue to be used for program versions on or after July 1, 2011. This would be the proper configuration for programs that are exempt from the updated clock to credit conversion rate.

Field	Description
FA Clock to Credit Conversion Rate (Prior to 7/1/2011)	This field is enabled when the **Program version subject to clock to credit conversion** check box is selected. The number you enter in this field (typically 20 for quarter-based program versions and 30 for semester- or term-based program versions) is divided into the clock hours completed to get the FA credits completed. This field accepts decimal values to the hundredths (second position to the right of the decimal point).
FA Clock to Credit Conversion Rate (As of 7/1/2011)	This field is enabled when the **Program version subject to updated clock to credit conversion (As of 7/1/2011)** check box is selected. This option allows you to enter an updated clock to credit conversion rate that will be applicable to all students enrolling into the program (having a Program Version start date) on or after July 1, 2011. The number you enter in this field (typically 25 for quarter-based program versions and 37.5 for semester- or term-based program versions) is divided into the clock hours completed to get the FA credits completed. This field accepts decimal values to the hundredths (second position to the right of the decimal point).
Total Out of Class Coursework Hours	This field is only visible when **Program version subject to clock to credit conversion** is selected. You can enter any positive value with one decimal point. When you click 'Save', a warning message is displayed if the Financial Aid Hours from the courses which exist in the Program Version Course list are not equal to the Total Financial Aid Hours configured on the Program Version (total Hours + outside Coursework Hours). This warning message contains Yes and No options. If you select 'Yes', the value is saved in the database; if you select 'No', the value is not saved in the database
Servicer Program ID	If you are using a Financial Aid servicer such as Global, you will have a program ID that is recognized by the servicer. 1 to 16 characters. The Servicer Program ID identifies the program to the servicer. It can include the program code used by the servicer to identify this program, or a Q or S determined by semester or quarter hours when the program is subject to the clock to credit conversion, or any other designator the servicer would like to have. This data is extracted in the Academic Extract files on each students detail record. Contact your servicer for questions on these issues.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Uses</td><td>
You can configure a Program Version to use Scheduled Academic Year (SAY) or Borrower Based Academic Year (BBAY). The Program Version can only be configured to use the SAY option if the academic calendar year is 2, 3, or 4. If the academic calendar year (Non standard Terms) is 1, 5, or 6, institutions must use BBAY, in which case the SAY option will be disabled.

If you select SAY, This Program Version uses Summer Header or Trailer becomes enabled. Selecting the Header or Trailer option will then enable With Credits in Summer Term and Use Summer Term in Packaging options. These options allow you to configure a program version to use the Summer Header or Trailer. and to specify the number of default credits to be awarded in a Summer Term as a Header or Trailer, with the ability to choose packaging in the Summer. If you select a Summer Header or Trailer option, and then decide not to use the option, you can clear your selection by using the Delete key.

The number of credits in the Summer term is an optional entry. If summer credits are not provided, the existing SAY logic will determine the number of credits in the Summer Term (i.e., full credits in the Academic Year will be divided by the total number of terms in the Academic Year, including the Summer Term). If summer credits are provided, the Total Academic Year credits will be the Full Academic Year credits added to the Summer credits.

Note:
1. When enrolling into a Program that is configured for SAY (Lists > Academic Records > Term), terms in the Enroll Student wizard will be filtered with Standard Terms. In addition, based on the academic year selected, the 'Number of Terms in Academic Year' entry will be restricted to the corresponding terms in the SAY (as shown in the example below).

Scheduled Academic Year Example
<table>
<tr><th>Academic Calender</th><th>Terms</th></tr>
<tr><td>Semesters</td><td>2</td></tr>
<tr><td>Trimesters</td><td>2</td></tr>
<tr><td>Quarters</td><td>3</td></tr>
</table>
2. When SAY is selected, Academic Years do not need to be associated with the Program Version. If Academic Years are attached, they are ignored because the Academic Year is created based on the 'Full Academic Year consists of' configuration on this form.
3. The Credits and Weeks fields (in the 'Full Academic Year consists of:' field) need to be populated for the Academic Year creation process to function properly.

Use the Term Association button to do the following:
• Associate terms and program versions
• Build the Academic Years based on this association
• Preview the term and program version association structure
• Copy a program version's term association data to all other program versions listed under the same program.

Note: The Term Association button is enabled only if the academic calendar year is 1 (non-standard term SE9W), 2, 3, or 4.
</td></tr>
</table>

Packaging for SAY with the Summer Term as Header or Trailer

The Financial Aid Packaging process, including Auto-Packaging, Batch-Packaging, and FA-Estimates, includes the Scheduled Academic Year (SAY) with the Summer Term as Header or Trailer. When packaging for SAY, the number of disbursements and Title IV amounts are calculated based on the SAY with the Summer Term Header or Trailer. The Summer term as Header or Trailer considers only fund sources marked Award in Summer.

Correct Number of Disbursements

The following guidelines are used to determine the correct number of disbursements.

Guidelines to Determine the Number of Disbursements

Selection	Start Term	Number of Disbursements	Disbursement Start Date
Semesters Fall and Spring with a Summer Trailer and Package for Summer	Fall	Three disbursements in the SAY	Disbursement 1 - Fall term Disbursement 2 - Spring term Disbursement 3 - Summer term
	Spring	Two disbursements	Disbursement 1 - Spring term Disbursement 2 - Summer term
	Summer	One disbursement for Summer Trailer	Disbursement 1 - Summer term
Semesters Fall and Spring with a Summer Header plus Package for Summer	Summer	Three disbursements in the SAY	Disbursement 1 - Summer term Disbursement 2 - Fall term Disbursement 3 - Spring term
	Fall	Two disbursements	Disbursement 1 - Fall term Disbursement 2 - Spring term
	Spring	One disbursement	Disbursement 1 - Spring term

Selection	Start Term	Number of Disbursements	Disbursement Start Date
Quarters Fall, Winter, and Spring with a Summer Trailer plus Package for Summer	Fall	Four disbursements in the SAY	Disbursement 1 - Fall term Disbursement 2 - Winter term Disbursement 3 - Spring term Disbursement 4 - Summer term
	Winter	Three disbursements in the SAY	Disbursement 1 - Winter term Disbursement 2 - Spring term Disbursement 3 - Summer term
	Spring	Two disbursements in the SAY	Disbursement 1 - Spring term Disbursement 2 - Summer term
	Summer	One disbursements in the SAY	Disbursement 1 - Summer term
Quarters Fall, Winter, and Spring with a Summer Header plus Package for Summer	Summer	Four disbursements in the SAY	Disbursement 1 - Summer term Disbursement 2 - Fall term Disbursement 3 - Winter term Disbursement 4 - Spring term
	Fall	Three disbursements in the SAY	Disbursement 1 - Fall term Disbursement 2 - Winter term Disbursement 3 - Spring term
	Winter	Two disbursements in the SAY	Disbursement 1 - Winter term Disbursement 2 - Spring term
	Spring	One disbursement in the SAY	Disbursement 1 - Spring term

Correct Award Amount

The following guidelines are used when determining the award amount for SAY with a Summer Header or Trailer plus the Package for Summer selected.

Maximum Limit / Terms Student will attend in AY

Semesters Summer Header/Trailer

- Title IV Grants: Amount configured on Packaging Method / 3
- Title IV Loans: Maximum Loan Limit based on Grade Level / 3

Quarters Summer Header/Trailer

- Title IV Grants: Amount configured on Packaging Method / 4
- Title IV Loans: Maximum Loan Limit based on Grade Level / 4

Correct Pell Amount

The following guidelines are used in determining the Pell amount for Summer Header or Trailer.

Semesters

- Maximum limit based on Summer enrollment status / 2

Quarters

- Maximum limit based on Summer enrollment status / 3

Correct Summer Enrollment Status

Summer enrollment status is calculated based on summer credits configured for the Program Version.

Total Pell award = Regular Pell + Summer Pell and if total Pell is more than AY maximum limit, then Pell record year around eligibility flag is checked.

- Existing logic in determining award amounts and number of disbursements is intact for SAY without Summer header or trailer.

Academic Year Creation Process including Summer Term as Header or trailer

The Enrollment wizard logic now includes the Summer Term as Header or Trailer in the Academic Year creation process, matching the start and end dates with the Summer Header or Trailer when configured. If the Summer Term as Header or Trailer is not configured, the logic for Academic Year creation remains as before.

For SAY, Student Academic Years are created based on total credits calculated and the number of terms in the academic year and the credits in the full academic year. Terms are calculated based on the SAY academic calendar, the Semester and Trimester based academic calendar has two terms, and the Quarters based academic calendar has three terms, plus with the Summer Header or Trailer, four terms. Using this configuration, Student Academic Years will be created until all the credits are assigned.

For a student who is enrolled with transfer credits, the total credits for the program that the student is being enrolled into are reduced by the number of the transfer credits.

Academic Years

Enrollment Status: Select an enrollment status option. These options correspond to the Department of Education requirements.

Academic Year List: This is a list of academic year setups that have already been completed. Click **Add** to add a new academic year or click **Edit** to edit a listed AY.

Term Association

Term Association lets you select and associate Terms and Program Versions with Uses set to SAY and BBAY when building the academic years.

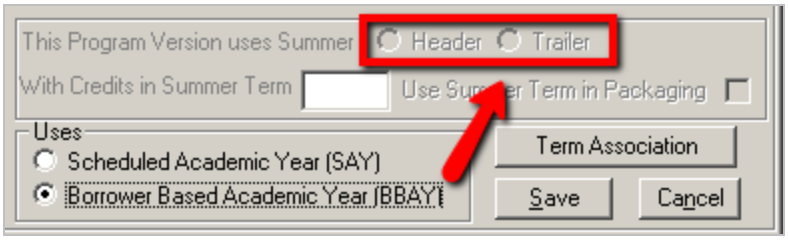
Term Association can be used with program versions with an Academic Calendar 1 (non-standard term SE9W) setting.

Note: When the Term Association button is selected, the SAY and BBAY options under Uses are disabled.

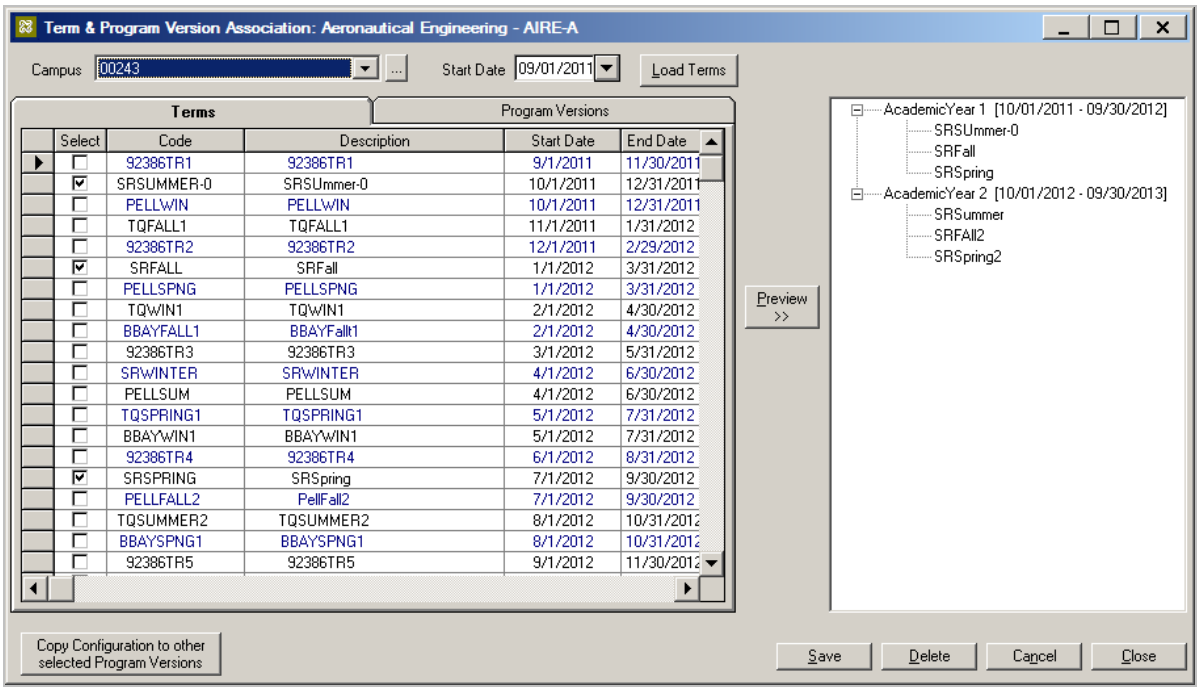
Using the Term Association configuration is necessary for term based program versions in CampusNexus Student to determine Loan Period and Academic Year dates which are required to be accurately reported to COD, NSLDS under guidance provided in Dear Colleague Letter (DCL) GEN-13-13. Institutions that choose not to use the Term Association feature will be responsible for manually managing and adjusting Loan Period and Academic Year dates to ensure regulatory compliance required under GEN-13-13. This includes processes such as Gainful Employment and SSCR.

Term Association lets you select and associate Terms to Program Versions for building the academic years (AY). The Uses options for SAY and BBAY allows the Term Association logic to identify the pattern to use for building AY sequences from the configured standard terms.

Note: If you select BBAY, the Header and Trailer option buttons are disabled in the summer header and trailer section.



If you created Academic Years using the Academic Years tab on the FA Program setup up form and created Academic Years using Term Association, the data in the Term Association form takes precedence.



To associate terms and program versions and build an academic year:

1. In the **Campus** list, select the applicable campuses. The Campus list is populated with all the campuses that the selected program version is associated with.
2. Select the **Start Date**. Start Dates are configured under Lists > Academic Records > Start Date.

   Note: The displayed start dates are related to only those campuses that the selected program version is associated with. For example, if a Start Date is related to a campus that is not associated with the selected program version, that Start Date is not displayed in the list.

   All the terms that belong to the selected program version and campuses are loaded in the Term tab. A term that is not shared between the selected campuses is not selectable (as indicated by the asterisks)..

   The Terms displayed are filtered based on the Academic Calendar selected. For example, if a program is set to Standard terms of Semesters or Trimesters you will only see terms that have been identified as semester or trimesters in Lists > Academic Records > Terms.

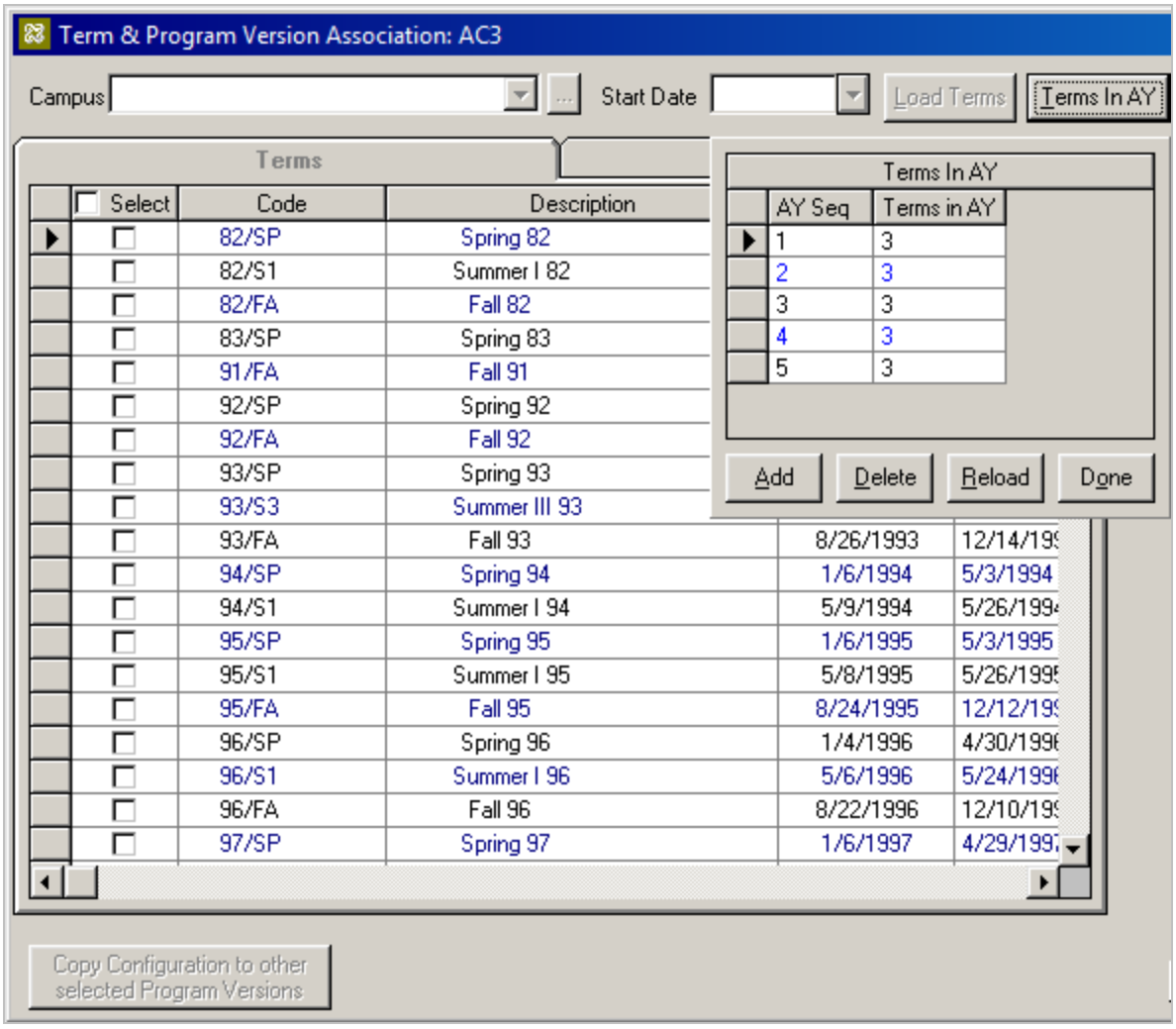
   - If the Academic Calendar is Standard terms of quarters, you will only see terms setup as quarters when selecting term association.
   - If your Program uses only summer trailers, you will only see Terms set up as summer trailers.
   - If your Program uses only summer headers, you will only see Terms set up as summer headers.

   Note: The same filtering is applied, if the Uses is set to BBAY. However, you will see all summers, as the concept of summer header or trailer in BBAY does not exist.

   If you have multiple term and program version configurations stored in the database, the form always lists the term and program version association data for the first Start Date, by default.

   If the Academic Year is configured as non-standard terms, the **Terms in AY** button appears. Selecting this button displays the number of calculated academic year sequences that will be created and enables the user to modify the number of terms for each academic year sequence. It also enables a value to be modified to a value less than the number of terms in a full Academic year and allow the additional academic year sequences, if needed.

   Note: The Delete button will not remove any academic year sequence past the minimum calculated needed to complete the program version based on the student attending full time for each term.



Note: It is recommend that the terms do not over lap.

3. In the Term tab, select all the terms that you want, and click **Preview**. The Preview button lists the academic years along with the terms that you've selected.

   The number of terms listed under each academic year are based on the Academic Calendar type. For example if you select Standard terms of semesters in the Academic Calendar list with a summer header or trailer, the maximum number of terms each academic year has listed is three.

   The academic years are built based on the following data from the selected program version:

   - Academic Calendar (type)
   - Academic year Credits, Weeks
   - Number of terms in the academic year
   - Number of credits in a Summer Term
   - Total Hours, Weeks, Credits in the program version

   Note: The academic years listed in the Preview pane may vary from the actual student academic years based on the student's Start Date and any transfer credits.

   Note: The Academic Years configured are validated to ensure they are always a complete Academic Year based

on the selected Start Date term. For example, if you select a Spring Start date for a Program Version using SAY, the Fall term prior to that Spring is displayed and must be selected to build a complete first Academic Year for Direct Loan purposes. But the enrollment process will only build the terms on or after the Start Date selected, so the Fall term will be ignored within that process. All subsequently configured Academic Years are also validated to ensure they are configured to contain the expected terms.

Academic Year Configuration

Academic Year	Summer	Term
Semester/Trimester	No Summer Term	Fall, Spring
Semester/Trimester	Summer Header	Summer, Fall, Spring
Semester/Trimester	Summer Trailer	Fall, Spring, Summer
Quarters	No Summer Term	Fall, Winter, Spring
Quarters	Summer Header	Summer, Fall, Winter, Spring
Quarters	Summer Trailer	Fall, Winter, Spring, Summer

For non-standard term program versions, the academic years are created from the number of terms per sequence within the Terms in AY grid.

4. Click **Save** to store the term and program version association data, or **Delete** to clear the values and start over.

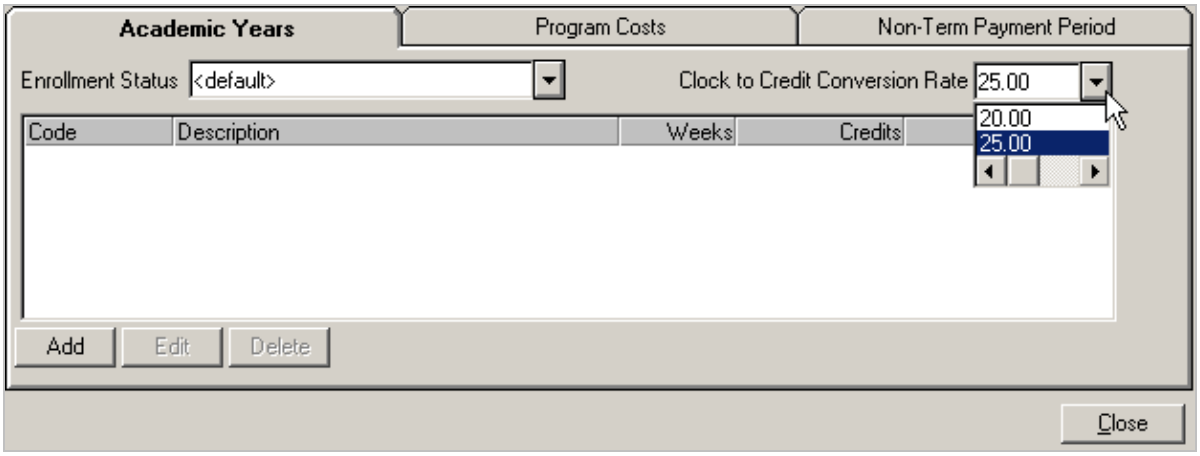
   When you click **Save**, the **Copy Configuration to other selected Program Versions** button will be enabled. This button will be disabled if term and program version association data does not exist.

   Note: You can only copy configuration to other programs that share the same academic calendar. The programs must share the same academic calendar if it includes the use of summer header or trailer.

5. In the **Program Versions** tab, select a program version to copy its term association data to all other program versions listed under the same program.

Academic Years tab

When working with the **Academic Years**, first select the **Enrollment Status**. You can use the **<Default>** if the academic years apply to all enrollment statuses (full time, 3/4 time, half time, etc.).



During the enrollment process, CampusNexus Student populates the applicable budget columns in the Student's Academic Year table if a default budget has been specified for any of the academic years defined for the program version in which the student is being enrolled. One of the steps that occur when a student is enrolled is population of the Student's Academic Year table with one record for each academic year defined for the program version. The academic years defined for each program version are stored. If the Budget ID column contains a value, the budget costs are calculated and updated in the applicable fields in the student's Academic Year table.

Note: If an updated FA Clock to Credit Conversion Rate (As of 7/1/2011) has been added to the configuration, the program academic year configuration can use the updated rate and the academic years can be filtered based on the conversion rate.

The new logic compares the Program Version Start Date of the student to the effective date to ensure that the proper clock to credit conversion rate is used. Once the conversion rate is selected, CampusNexus Student builds the Academic years that are configured for that rate.

To add or edit a new Academic Year to a Program

The **FA Program Academic Year** form allows a default budget to be specified. If a default budget is selected, this budget will be used for any student in this program version being packaged for the specified academic year. The caption for the new field is "Default Budget". The drop-down list for this field will be generated from the FA Budget table.

1. Click **Add** to add a new academic year to your program, or select an existing line on the AY grid and click **Edit** to view or change it. The Financial Aid Program Academic Year form is displayed.

   CampusNexus Student displays Program version, A/Y Sequence, and Enrollment Status from the previous form.

2. Select a **Default Budget** for the selected Academic Year.
3. Select the AY **Definition**. The AY description is displayed.

   Note: To add a new academic year definition, click **New** to open the Financial Aid Academic Year Definitions form.

4. Enter the number of **Hours In A/Y** and the number of **Terms in A/Y**.
5. Click **Save** to save the academic year data.
6. Financial Aid Program Academic Year form: Click **Close** to close the form.
7. Program Code Setup form: Click **Close** to close the form.

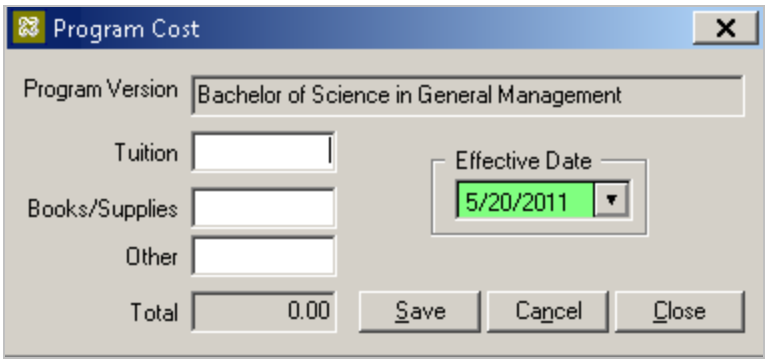
Program Costs Tab

Budget Tuition (Total Program Cost) - CampusNexus Student displays data in this field if the program budget is set up for option B - Calculate from Total Program Costs.

Budget Other (Total Program Cost) - CampusNexus Student displays data in this field if the program budget is set up for option B - Calculate from Total Program Costs.

Budget Books/Supplies (Total Program Cost) - CampusNexus Student displays data in this field if the program budget is set up for option B - Calculate from Total Program Costs.

1. Select a program in this tab and click **Add**, **Delete** or **Edit**.
2. Fill in the Program Cost form.



Program Version - Read-only.

Tuition, Books/Supplies, Other - Type in these costs.

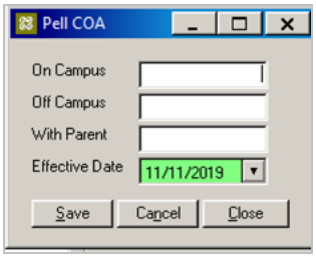
Effective Date - Select the effective dates for the tuition and books/supplies components of budgets on program versions. This feature enables program versions to have multiple tuition and books/supplies amounts if needed.

3. Click **Save** (in the Program Version box) to save changed data.

Pell COA Tab

You can configure a Pell cost of attendance (COA) instead of using a calculated Pell COA. The value will be displayed on the Awards form in the Need Analysis grid by matching the housing status on the student's academic year with the corresponding housing status configured here.

1. Select a program in this tab and click **Add**, **Delete** or **Edit**.
2. Fill in the Pell COA form.



Note: When you click Edit for an existing program, the fields will be populated by the current configured Pell amounts.

On Campus - Enter amount if student lives on campus.

Off Campus - Enter amount if student lives off campus.

With Parent - Enter amount if student lives with parents.

Effective Date - Select the effective date for the Pell components of budgets on program versions. This date will be compared to the students Academic Year start date to determine if it will be used.

3. Click **Save**.

Non-Term Payment Period tab

The configuration options available on this tab help set the payment period parameters that will be evaluated within the Disbursement Approval Criteria of the auto disbursement feature. The concept of payment period in the FA Program Setup form is strictly payment period time-frame estimations. The settings here do not define the actual Title IV payment periods that are

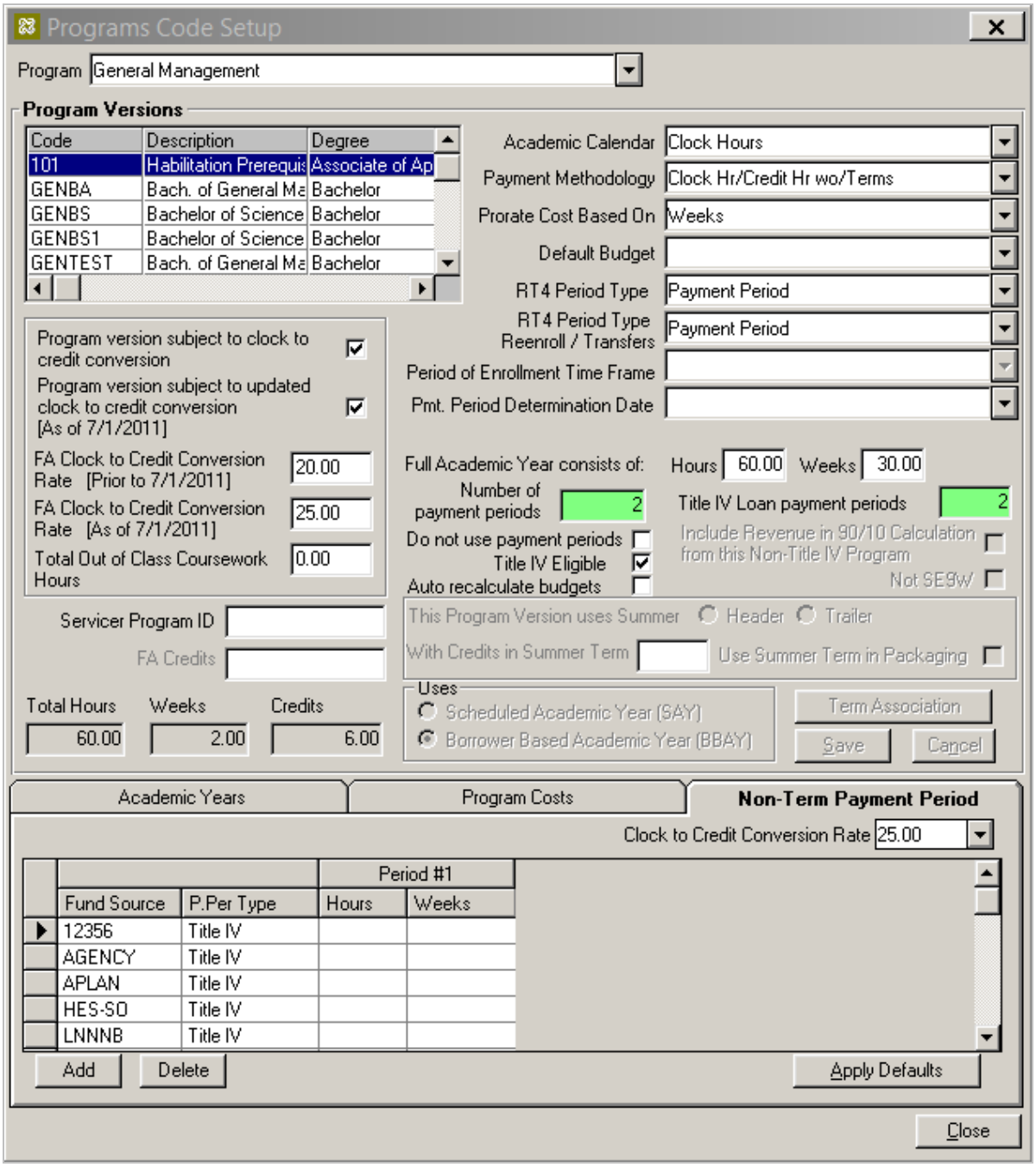
visible in students' Award forms. The Title IV payment periods visible in the Award form is a built-in calculation within CampusNexus Student, depending on the program's academic year settings. See Title IV Payment Periods for more information on this topic.

The number of credits or hours defined for each fund source in the grid indicate the minimum number of credits or hours students must achieve within the given payment period time-frame, estimated by the number of weeks entered, to receive awards for the select fund source. The hours or credits values entered here are evaluated as Disbursement Approval Criteria in the auto disbursement approval feature.

You can make changes with this tab under the following conditions:

- **Academic Calendar** is configured and set to **Clock Hours** or **Credit hours without terms**.
- **Payment Methodology** is configured and set to **Clock Hr/Credit Hr wo/Terms**.

The tab displays the payment periods for the Academic Year, with a separate column assigned to each payment period. The number of columns displayed must match the number of payment periods entered in the **Number of payment periods** field just above this section. For example, if you enter "3" in this field and then click **Apply Defaults**, three columns are displayed:



These columns are also used for the non Title IV non-loan payment periods. This list excludes Work Study and Cash awards. Click **Add** to add columns. Click **Delete** to remove columns.

The **Number of payment periods** field has a dual purpose. First, this field initially fills the grid below the **Non-Term Payment Period** tab with the number of columns indicated in that field. For example, if you indicate three payment periods, this grid will fill with three columns. This field also indicates the number of payment periods for Pell, SEOG, ACG and SMART grants.

The configuration options for **Full Academic Year consists of: Hours** and **Weeks**, the two payment configuration values, plus the weeks specified for each payment period in the grid in the lower half of the form help set the payment period parameters that will be evaluated within the Disbursement Approval Criteria of the auto disbursement feature. The concept of payment period in the FA Program Setup form is strictly payment period time-frame estimations. The settings here do not define the actual Title IV payment periods that are visible in students' Award forms. The Title IV payment periods visible in the Award form is a built-in cal-

culation within CampusNexus Student, depending on the program's academic year settings. See Title IV Payment Periods for more information on this topic.

The number of payment periods for Title IV loans may differ from all other loan types. The **Number of payment periods** represents the number of payment periods for non Title IV loan awards and all Title IV awards besides Title IV loans. The **Title IV Loan payment periods** field represents the number of payment periods within each academic year for Title IV loans only.

The number of credits or hours defined for each fund source in the grid indicate the minimum number of credits or hours students must achieve within the given payment period time-frame, estimated by the number of weeks entered, to receive awards for the select fund source. The hours or credits values entered here are evaluated as Disbursement Approval Criteria in the auto disbursement approval feature.

Note: You cannot display fewer columns than the **Number of payment periods** field display. For example, if you have entered '3' into that field, you cannot display fewer than three columns.

If the **Academic Calendar** is set to **Clock Hours**, this tab displays **Hours and Weeks** under the **Period** columns. If the **Academic Calendar** is set to **Credit hours without terms**, then two columns appear below each period, **Credits and Weeks.**

Note: When an Academic Calendar 6 (Credit Hours without Terms) program version is selected, the **Credits** field/column MUST have a non-zero value. The system prevents an AC6 program from being saved if there is a non-zero value in the **Credits** field.

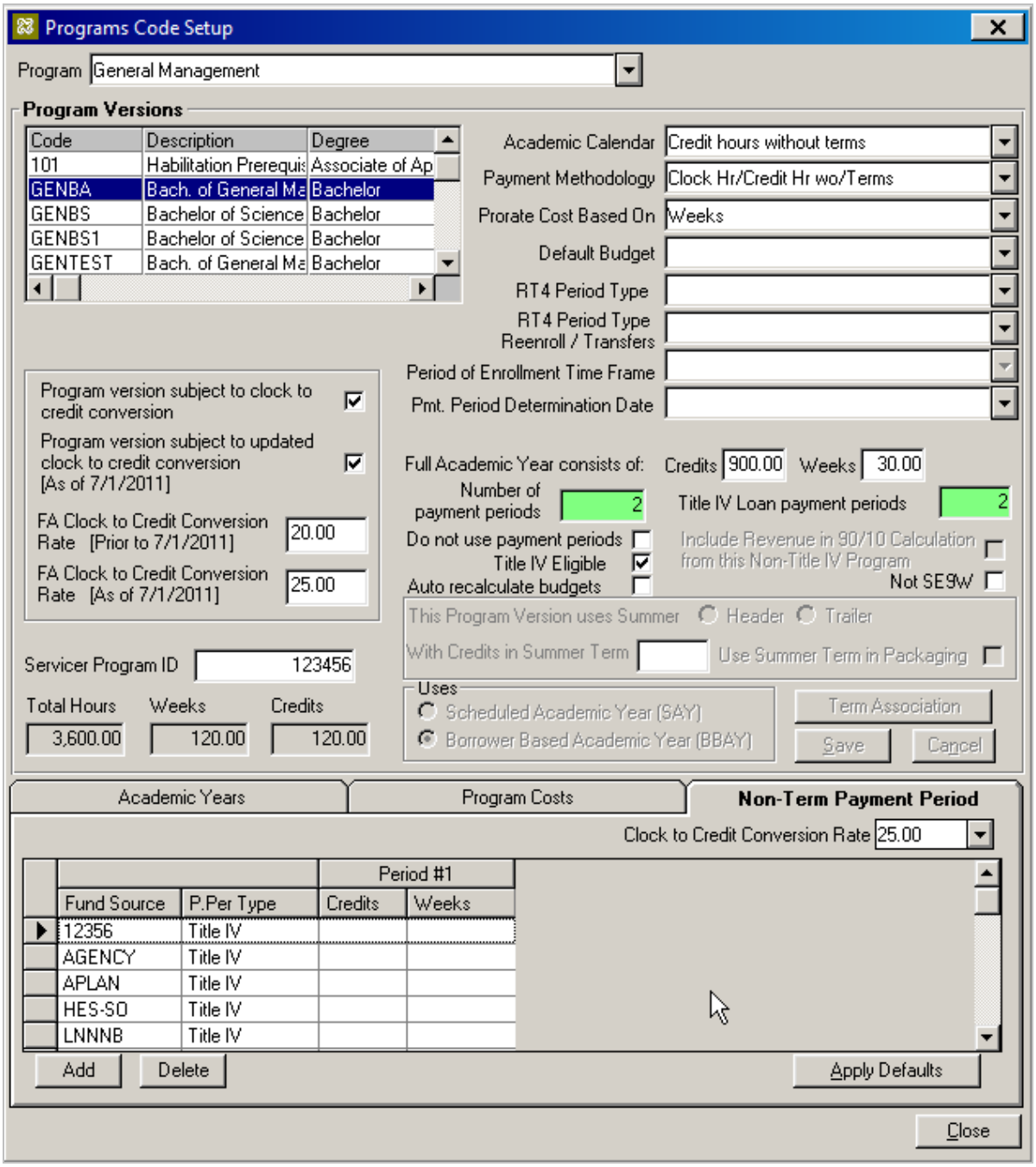
The **Do not use payment periods** check box enables you to select whether you would like to use Title IV in the **P Per Type** (Payment Period Type) column on the Non-Term Payment Period tab.

- If this column is designated as Title IV and the **Do not use payment periods** check box is cleared, then selecting this check box will display a message inquiring if you would like to set all entries in the grid to "Do Not Use". If you select Yes, then the **P Per Type** column will auto-populate with Do Not Use; likewise, if you select No, the column will remain as is.
- If this column is designated as Do Not Use and the Do not use payment periods check box is selected, then deselecting this check box will display a message inquiring if you would like to set all entries in the grid to "Use Title IV". If you select Yes, then the P Per Type column will auto-populate with Title IV; likewise, if you select No, the column will remain as is.

Note: When the Program Version is saved, the totals of the fields contained under the Period columns will be verified against the program totals listed for the Program Version. An error message is displayed and the save will be cancelled.

For example when the Academic Calendar is set to Clock Hours, if the sum of the Hours and Weeks in the Payment Period columns do not equal the Total Program Hours and Weeks, an error message is displayed. After acknowledging the error message, the Weeks (or Hours) in the Payment Period columns must be changed so that their sum will match the Total Program Hours or Weeks.

Likewise when the Academic Calendar is set to Credit hours without terms, the sum of the Weeks and Credits in the Payment Period columns will be compared against the Total Weeks and Total Credits for the Program Version.

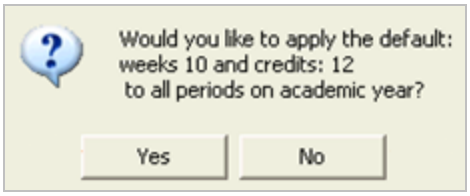


Note: This grid displays **only** non Title IV, non Cash and non-Work study fund sources.

1. Click **Add** to add columns.

   Note: When Add is clicked, the fields change from the default setting of blank and fill with zeros.

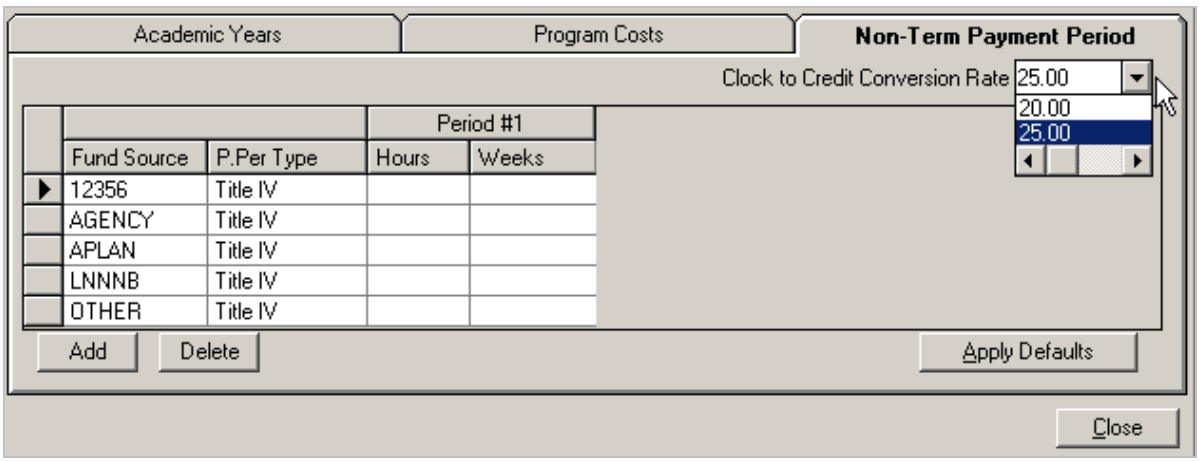
2. Click **Apply Defaults** to use pre-filled values in the grid. A new dialog box is displayed asking if you want to apply the default weeks and credits to all periods on an academic year.



Clicking **Yes** will fill the grid in with these predefined values.

Note: If an updated FA Clock to Credit Conversion Rate (As of 7/1/2011) has been added to the configuration, the non-term payment period configuration can use the updated rate and the non-term payment periods can be filtered based on the conversion rate.

With the multiple Clock to Credit conversion rates, you can configure different payment periods based on the Clock to Credit rate.



Example: Full Formula Conversion of Clock Hours to Semester Hours

Institutions are responsible for validating that they are not overawarding credit when converting clock hours for courses requiring out-of-class work that is customized for each course. The example presented here -- based on guidance provided by the Department of Education (ED) on the Full Formula options for clock to credit conversions -- will help institutions ensure that they do not enter hours that are too high for the base (in-class) hour value.

Scenario

A program with 720 clock hours consists of:

- Five (5) classroom courses with 120 clock hours each, and
- A 120 clock-hour externship with no out-of-class student work

The institution determines that:

- For the first three classroom courses, a student generally is required to perform 40 hours of out-of-class work for each course, and
- The last two classroom courses have eight (8) hours of out-of-class work for each course

Using the Full Formula option:

- Conversion is based on both clock hours and out-of-class work to determine the maximum allowable credit hours
- Several outcomes are possible, depending on the institutional policy for rounding (if rounding, always round down course-by-course):
  22.026, 22, 21 semester hours

	In-class clock hours		Allowable out-of-class prep hours	Total clock and prep hours	Semester hours	Semester hours (rounded)	Sem. Hrs. (Alternative rounding)	Notes
Course #1 (40 hours of actual out-of-class student work)	120	+	7.5 * 4 = 30	150	4	4	4	(A), (C)
Course #2 (40 hours of actual out-of-class student work)	120	+	7.5 * 4 = 30	150	4	4	4	(A), (C)
Course #3 (40 hours of actual out-of-class student work)	120	+	7.5 * 4 = 30	150	4	4	4	(A), (C)
Course #4 (8 hours of actual out-of-class student work)	120	+	8	128	3.413	* 3	3.4	(B), (D)
Course #5 (8 hours of actual out-of-class student work)	120	+	8	128	3.413	* 3	3.4	(B), (D)
Externship (no out-of-class student work)	120	+	0	120	3.2	* 3	3.2	(E)
						* All fractions are rounded down, even if greater than .5		
Total clock hours and out-of-class student work (amount not relevant) must look at each course				826				
Total semester hours if no rounding					22.026			
Total semester hours if rounding (must round down any fractions to ensure no overawards)						21	22	

NOTES:

Limitation: the rules do not allow more than 7.5 hours of out-of-class prep for every 30 hours in class

(A) 120 in-class hours divided by 30 hours = 4 — There are 10 hours of out-of-class prep per 30 clock hours (40/4 = 10), but cannot have more than 7.5 (4 * 7.5 = 30)

- Must meet thirty clock-hour minimum
- Is no carry over of out-of-class work between courses

(B) 120 in-class hours divided by 30 hours = 4 — There are 7.5 or fewer hours of out-of-class prep per 30 clock hours (8/4 = 2), so use actual hours of out-of-class prep (8)

- Use all out-of-class work for courses #4 and #5
- Have more than 30 clock hours per semester hour

Semester hours per course

(C) 150 total clock and prep hours divided by 37.5 = 4

(D) 128 total clock and prep hours divided by 37.5 = 3.413

(E) 120 total clock hours divided by 37.5 = 3.2

- Calculate semester hours based on total clock hours and allowable prep hours per course

Lists > Student Accounts

When you navigate to Lists > Student Accounts, the Setup - Student Accounts Lists form is displayed. Add, edit, delete, disable, and print Student Accounts lists from the following tabs:

- Account Statuses
- Bank Codes
- Billing Methods
- Cash Drawers
- Cash Payment Descriptions
- Course Refund Policies
- Credit Card Types
- Drawdown/Return Sources
- Earnings Methods
- Programs
- Refund Policies
- Subsidiaries
- Term Group
- Transaction Codes
- Tuition Discount Policies

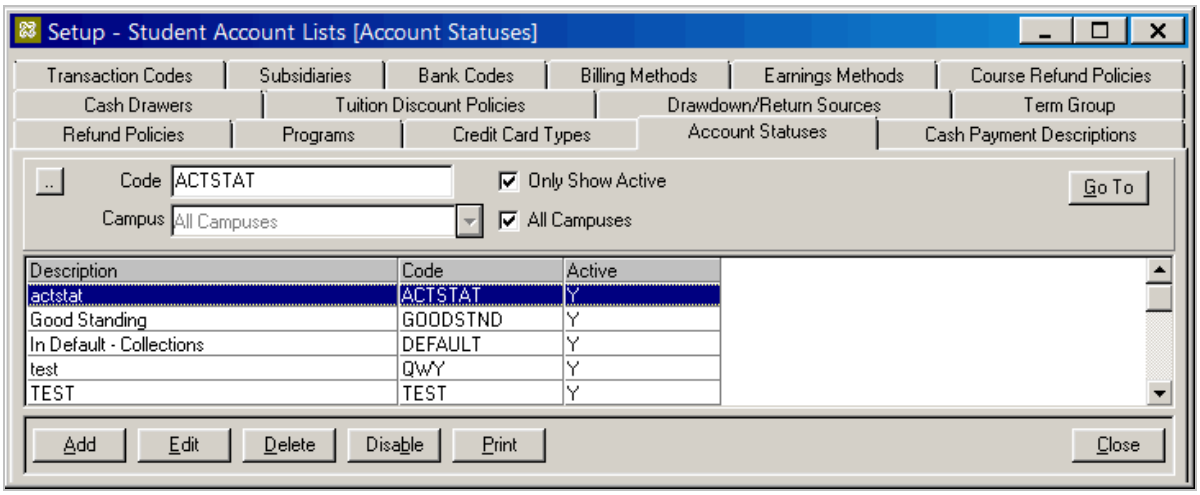
See Maintaining Lists for instructions on adding, editing, deleting, disabling, enabling, and printing lists.

Setup - Student Account Lists [Account Statuses]

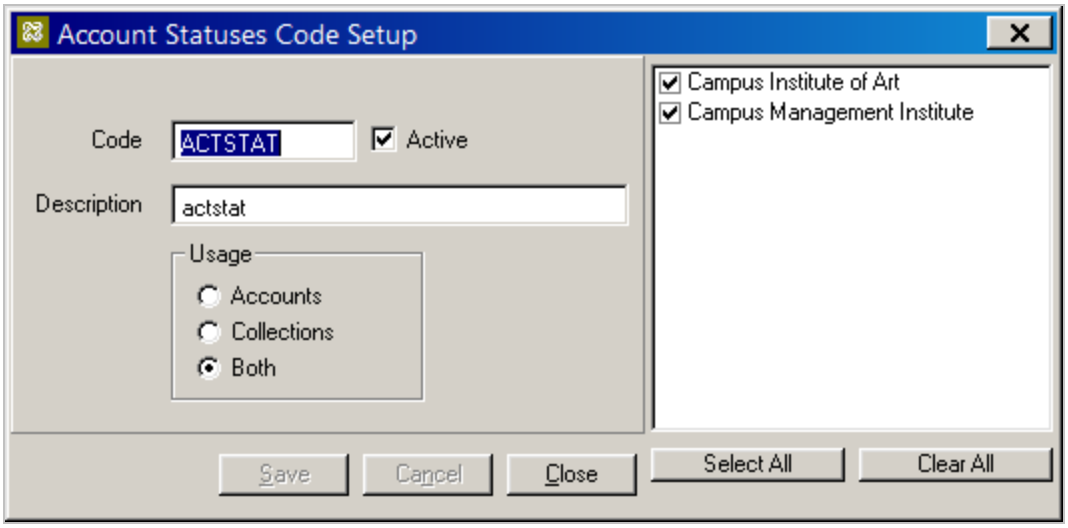
The Account Statuses list defines account and collections statuses (Legal, Bankruptcy, Sold Receivable, Write Off, Collection, and so on) to the Ledger Card. This enables you to track internal collections, external collections, and high risk collection groups within the application. You can define a list of statuses and assign statuses to the student's Ledger Card.

To add or edit a list of account statuses codes:

1. Navigate to **Lists** > **Student Accounts**. The Setup - Student Accounts Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Account Statuses**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
6. Click **Add**, or select a record and click **Edit**. The Account Statuses Code Setup form is displayed.



7. Specify a unique **Code**.
8. Enter a **Description**.
9. Select one or more **Campuses**.
10. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
11. In the Usage section, select:
    - **Accounts** if the account status is only used to indicate an account status.
    - **Collections** if the account status is only used to indicate a collection status.
    - **Both** if the account status is used as an account status and/or a collection status.
12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

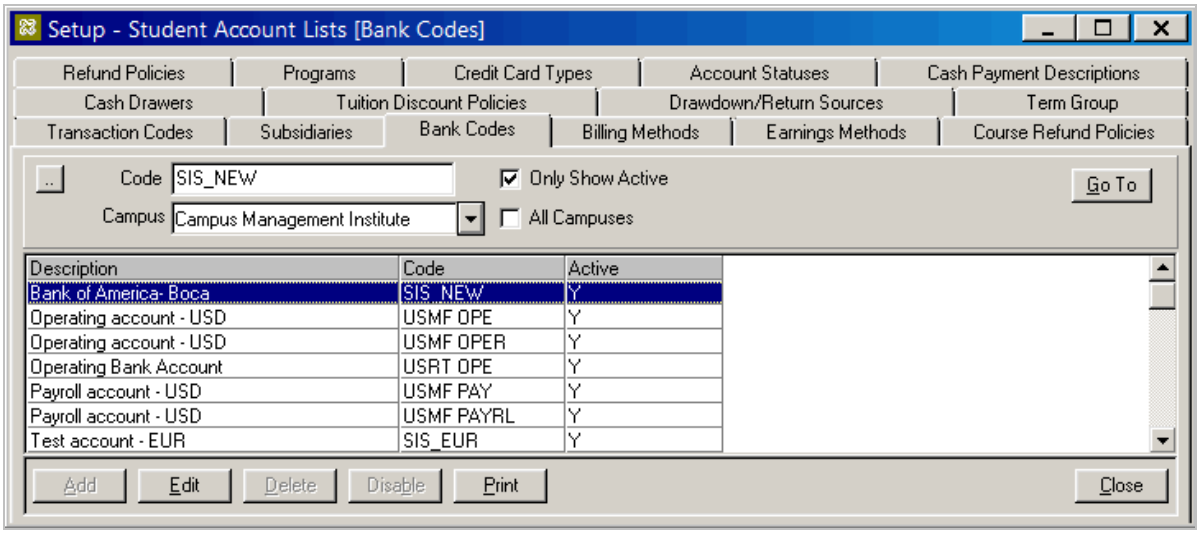
Setup - Student Account Lists [Bank Codes]

Use the Setup - Student Account Lists [Bank Codes] form to identify the banks with which your institution does business. You can set up multiple accounts in each bank. Each bank account is related to a general ledger account number for posting transaction activity. You can set up separate debit and credit accounts for stipends so that you do not have to use the same accounts as those used for refunds. You can also print a list of your banks and the accounts in each bank from the Setup - Student Account Lists [Bank Codes] form.

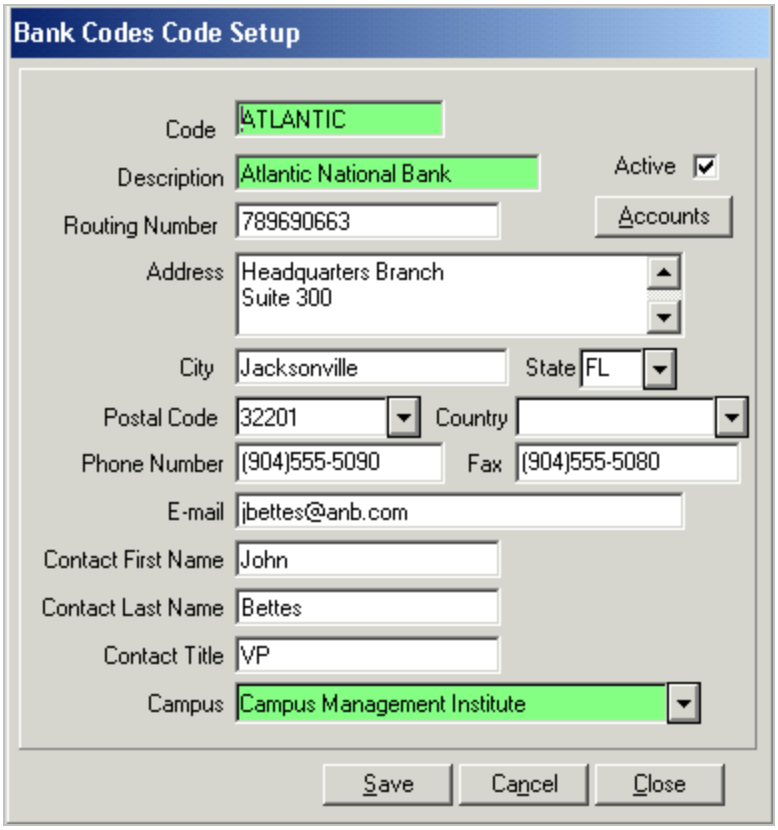
If your CampusNexus Student system is integrated with an accounting system, refer to CampusVue Finance, HR & Payroll or CampusNexus Finance, HR & Payroll for instructions on setting up bank accounts and bank codes.

To add or edit a list of bank codes:

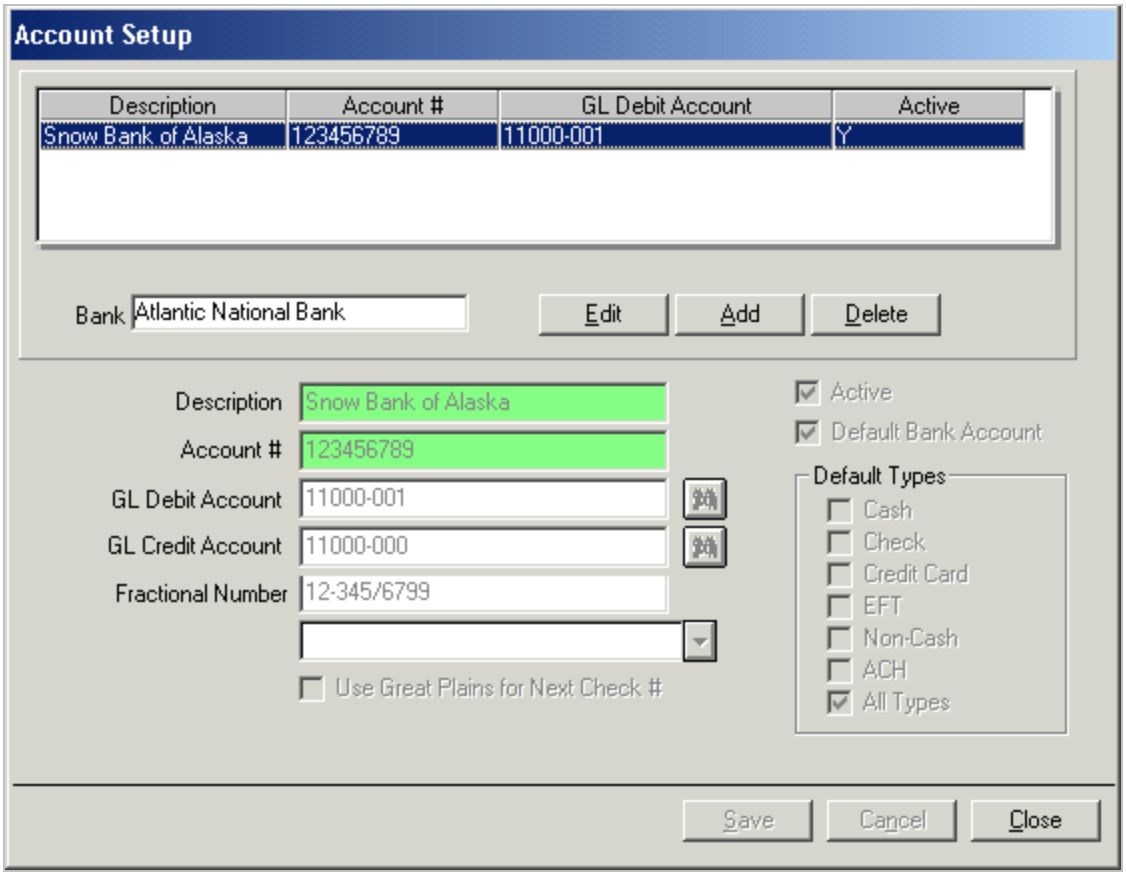
1. Navigate to **Lists** > **Student Accounts**. The Setup - Student Accounts Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Bank Codes**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
6. Click **Add**, or select a record and click **Edit**. The Bank Codes Code Setup form is displayed.

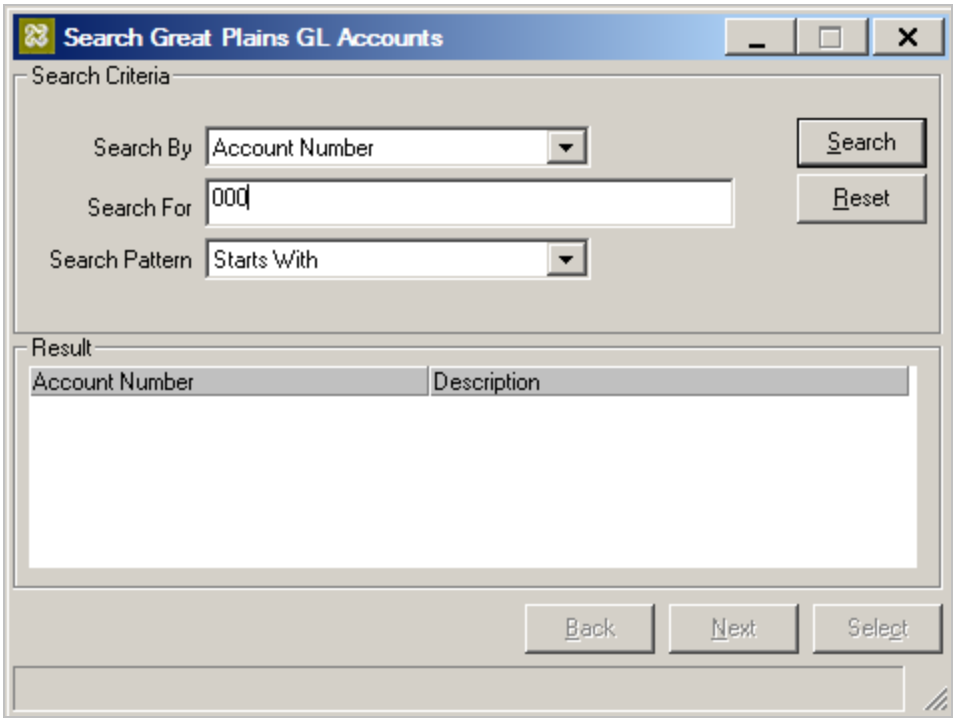


7. Specify the necessary data. If you add or edit a bank record, click **Save** before working with the account details. Be sure to select a campus.
8. Click **Accounts**. The **Account Setup** form is displayed. The grid on this form accommodates 28-character G/L account numbers. If necessary, resize the table columns.



9. To edit an account, select the account from the list and click **Edit**.
10. To add an account for the selected bank, click **Add**.
11. Enter a **Description**, **Account Number**, and related **General Ledger Account Numbers**.
    - If the Great Plains search feature is enabled, select a row, and click the **Great Plains Search** button to search for Debit Account or Credit Account numbers in the Great Plains GL.
        a. In the Search Great Plains GL Accounts form, click the **Search By** list. Search for GL Accounts using the **Account Number** or **Description**.

        Note: These searches also return Stipend Account information when you have set up separate debit and credit account numbers for stipends.



b. In the **Search For** field, enter the account number or description.

c. Specify the **Search Pattern**. The Search pattern works as follows:

- “Starts With” finds an exact match on data that starts with the characters you specify.

  Enter dashes when using this method. For example, if you have a mask that uses ###-####-## and you enter 0000, you will not get any matches. You must enter 000- or 000-0 to get matches, where the first four digits in the account number are zeros.

- "Contains" finds any value that contains what you have entered.
- "Wildcard" searching uses % for any string that follows what is entered. The "_" only replaces a single character.
- "Exact Match" must contain everything you enter. There cannot be additional characters before or after what was entered. If you are not sure of the exact wording, choose “Contains”.

d. Click **Search**. All GL Accounts that meet the specified criteria are displayed in the result grid.

Based on the value specified in the Max GP GL Account Search field, the results grid displays the data in one page or across many pages. If there are more records than the default number of rows, CampusNexus Student displays:

- Number of records displayed.
- Total number or records matched.
- A Next button to display the next records matched.

e. Double-click the applicable row, or click **Select** to add the account details to the Debit Account or Credit Account field.

f. Click **Save**. CampusNexus Student saves all records for all campuses that use Great Plains, that contain both a valid Debit and Credit Account or both the Debit and Credit accounts are blank. An

error message is displayed if any campus that uses Great Plains is using an incorrect Debit and/or Credit account.

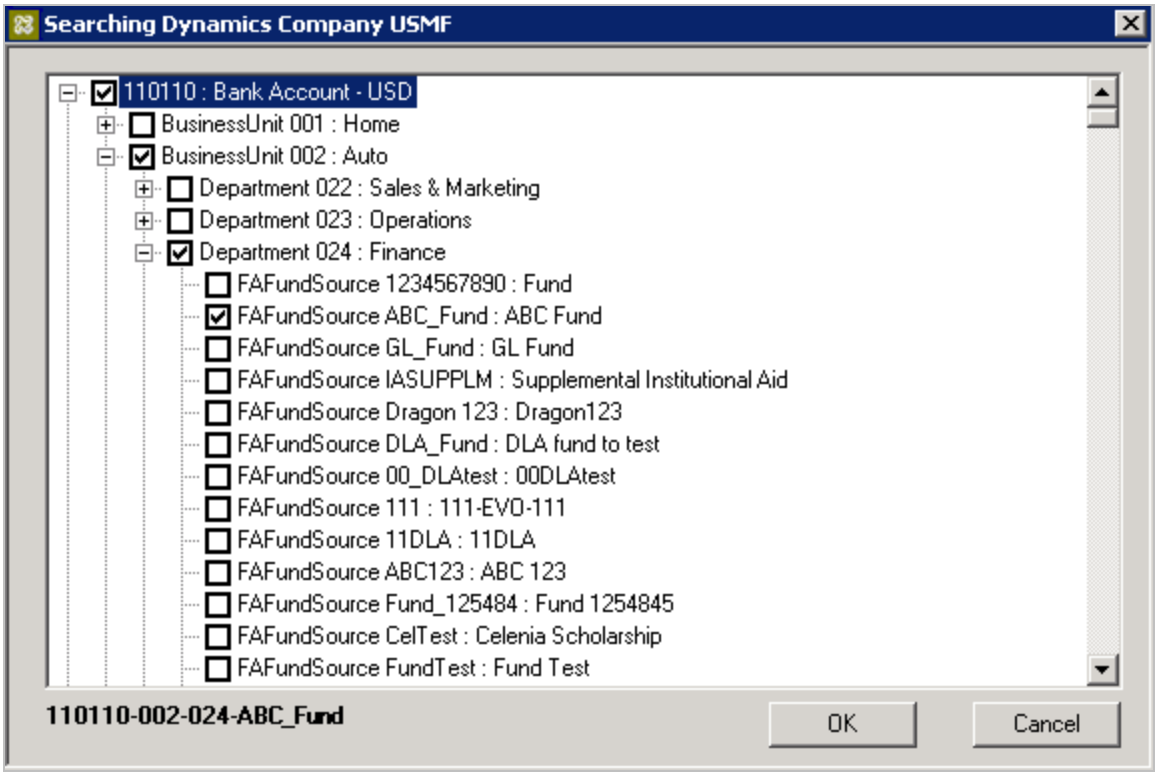
The **Reset** button on the Search GP GL accounts form clears the fields for a new Search.

- If CampusNexus Student is integrated with CampusVue Finance, HR and Payroll or CampusNexus Finance, HR and Payroll, select a row and click the **Power Search** (for CampusVue Finance, HR and Payroll) or **Select GL Account** (for CampusNexus Finance, HR and Payroll) button to search for the appropriate GL Debit and GL Credit accounts.
    - If using CampusVue Finance, HR & Payroll, select the appropriate Ledger Account and click **OK**.
    - If using CampusNexus Finance, HR & Payroll, select the appropriate dimension attribute and click **OK**.

Note

- Your permissions in the accounting system determine which GL accounts you can view and select in CampusNexus Student.
- The Main account node can be displayed at any level in the account hierarchy. This is based on the account structure setting that is configured in Microsoft AX. For information about this setting, your administrator must see Microsoft AX Help.

When you click **Save** after selecting the account, the system validates your selection against the account structure setting in Microsoft AX. This validation also occurs when transactions are released to G/L.



12. Enter a **Fractional Number**. The Fractional Routing Number identifies the paying bank and consists of a number in the following format: 12-345/6789. Typically, this number is displayed in the upper right corner of a check.

13. If the 'Integrate Bank Reconciliation with GP' feature is enabled in Setup > Student Accounts, select **Great Plains Checkbook**. Use the drop-down list to select the Great Plains checkbook record that is associated with the CampusNexus Student bank account.
14. Select the **Use Great Plains for Next Check #** check box to display the next check number currently stored in the Great Plains checkbook master record. If the bank account is set up to get the next check number from Great Plains, it is so indicated on the Check Printing form and CampusNexus Student prevents you from changing the check number on the form.
15. Select **Active** to indicate that this is an Active account.
16. Select **Default Bank Account** if this is the account in which deposits are normally made for this campus. If a deposit must go into a different account, users can change it at the time the deposit is prepared. For more information on selecting default bank accounts, refer to Default Bank Account Setup.
17. In the **Default Types** section, select a type of payment for which this account will be used, or select **All Types**.
18. Click **Save**.
19. To remove an account, select the account and click **Delete**.

    A confirmation message is displayed. Click **Yes**.

Note: The General Ledger Accounts report lists the general ledger debit and credit account numbers for the selected transaction codes.

CampusVue Finance, HR & Payroll

CampusNexus Student and CampusVue Finance, HR & Payroll provide the ability to define banks, establish multiple accounts within each bank, and post deposits and checks to the bank accounts.

Setting up Banks and Bank Accounts

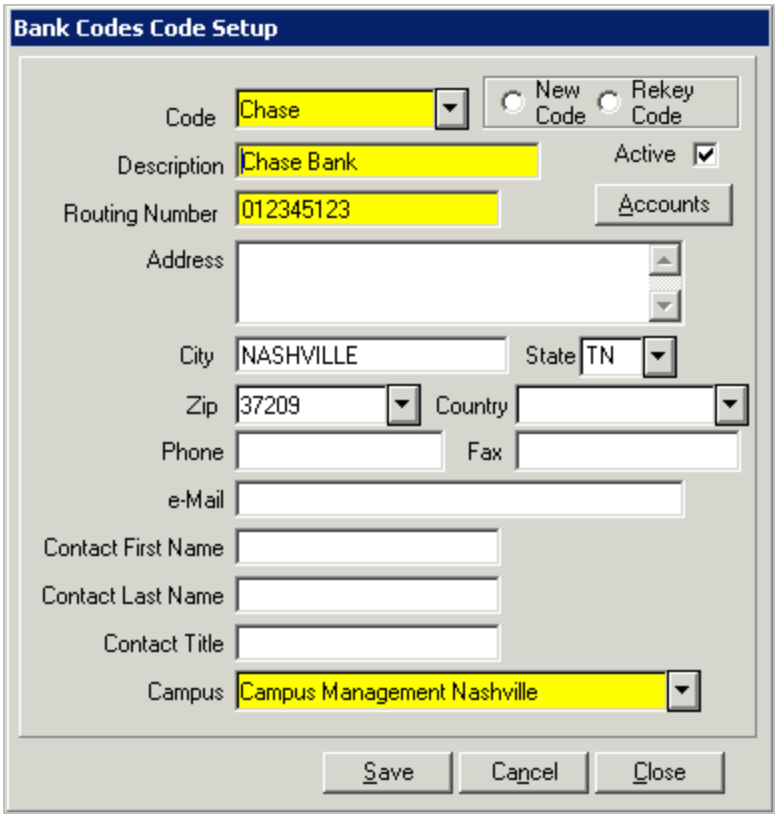
The setup of banks and bank account information is entered in CampusNexus Student and passed to CampusNexus Student where it will be verified in the banking setup tables, banks, and bank accounts values. Whenever a Bank Code is changed, a database trigger modifies all transactions and setups in CampusVue Finance, HR & Payroll.

Since Banks and Bank Accounts are longer accessible in CampusVue Finance, HR & Payroll, fields that do not exist in CampusNexus Student but are needed for CampusVue Finance, HR & Payroll are added to CampusNexus Student. A Bank Alias field is added to the Bank Accounts form. CampusNexus Student validates that the value entered is unique. A Bank Alias drop-down list enables the user to add, edit, or re-key bank aliases.

Unique Bank Name, Bank Alias, Bank Account, and Routing Number values are required when CampusVue Finance, HR & Payroll is installed since they are used simultaneously. Therefore, these fields are required when creating or editing a bank account in CampusNexus Student.

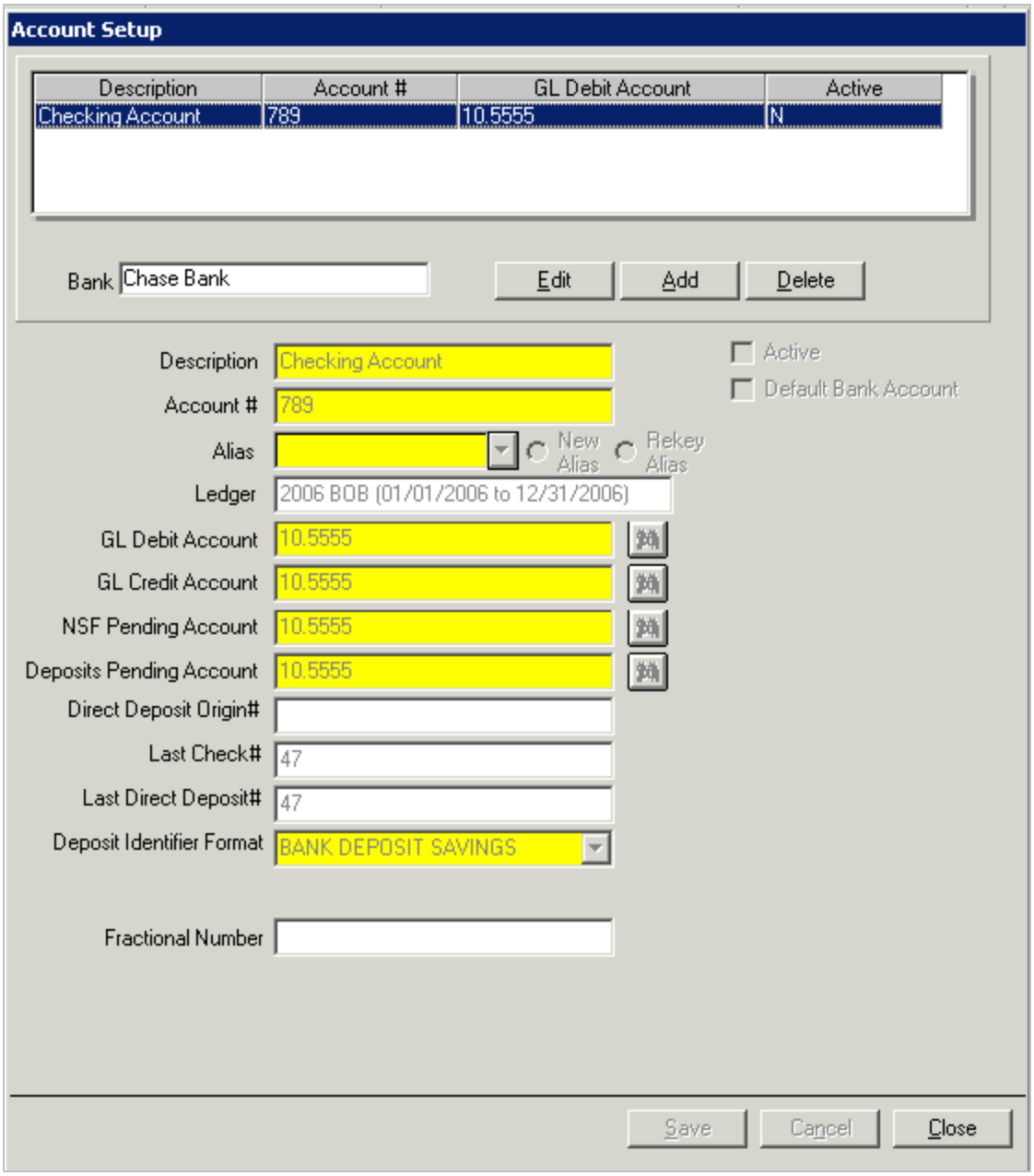
If a Bank Name or Bank Account is added, edited, or deleted and the corresponding records in CampusVue Finance, HR & Payroll cannot be updated, the changes are not saved and an informational message is displayed.

1. Navigate to **Lists > Student Accounts > Bank Codes** (tab). The Bank Codes Code Setup form is displayed.



2. The drop-down list on the **Bank Code** field enables you to link multiple Banks from different campuses to a single bank in CampusVue Finance, HR & Payroll.
3. You can add, edit, or re-key a bank code. The routing number at the top of the form is linked to the Bank Code field. Both fields must be completed when adding, or re-keying the bank code. Information changed on a bank linked to a bank code changes all banks linked to the same bank code.
4. To add a bank code and routing number, select the **New Code** option, specify data in the required fields, and click **Save**.
5. To rekey a bank code and routing number, select the **Rekey Code** check box, specify data in the required fields, and click **Save**. All Banks with the same bank code are updated to the new value.
6. Click **Accounts** to set up bank accounts. The **Alias** field on the **Account Setup** form allows multiple bank accounts within CampusNexus Student to be linked to a single Bank Alias in CampusVue Finance, HR & Payroll.

   Information changed on a bank account linked to a bank alias changes all bank accounts linked to the same alias. The Alias field is required and functions the same as the Bank Code fields above. You can add, edit, or rekey the bank's alias, but the value must be unique. When selected, the associated GL Debit and Credit Account numbers, NSF Pending Account, Deposits Pending Account, and Deposit Identifier Format values are extracted from CampusVue Finance, HR & Payroll and posted to the **Account Setup** form.

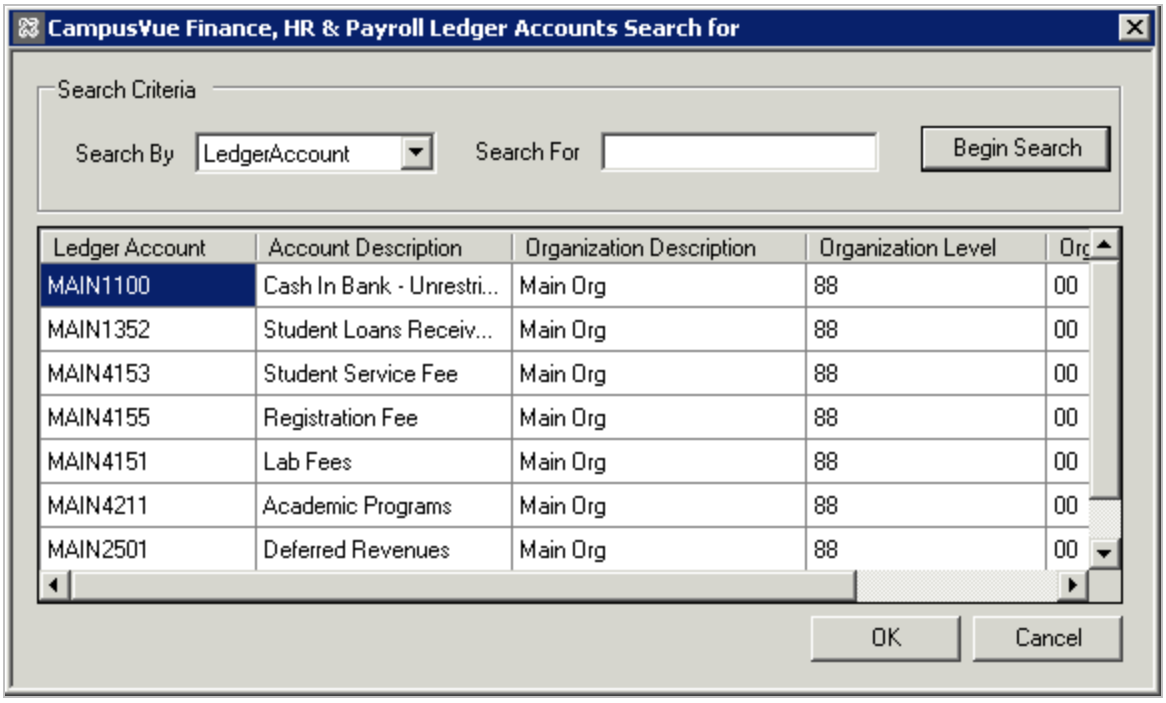


Account Setup

Account	Used as
GL Debit Account	a. Debit side of the journal entry when the Bank Deposit Wizard is run for this bank (increasing cash). b. Credit side of the journal entry on Student Ledger refunds from this bank (reducing cash), that is not connected to the fund source, or the fund source refunds G/L account for the corresponding fund source and campus has not been filled in. c. Credit side of the journal entry on Subsidiary refunds when the Subsidiary G/L accounts for refunds for this subsidiary and campus have not been filled in (reducing cash). d. This is normally the G/L account for the cash account associated with this bank account.

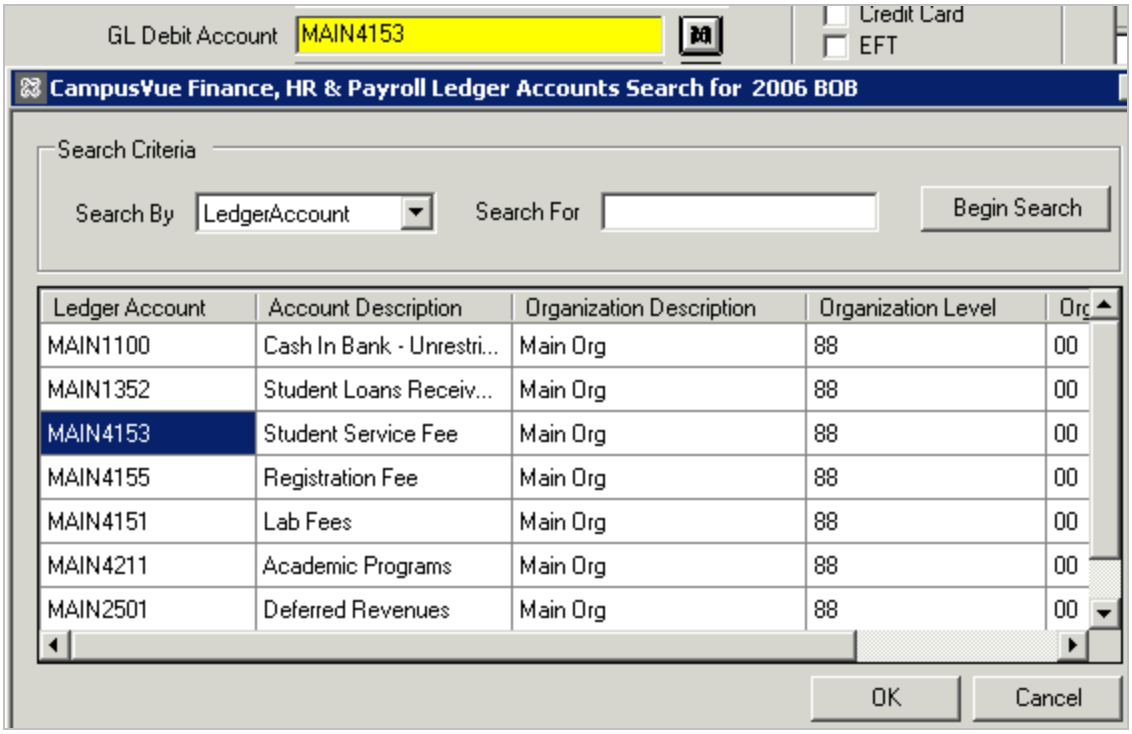
Account	Used as
GL Credit Account	a. Credit side of the journal entry on Student Ledger payments received for this bank, that are not connected to a fund source, or the fund Source Disbursements G/L account for the corresponding fund source and campus has not been filled in. b. Debit side of the journal entry on Student Ledger negative payments received, NSF payments or voids of payments received for this bank, that are not connected to a fund source, or the fund Source Disbursements G/L account for the corresponding fund source and campus has not been filled in. c. Debit side of the journal entry on Student Ledger refunds for this bank, that are not connected to a fund source, or the fund Source Disbursements G/L account for the corresponding fund source and campus has not been filled in. d. Credit side of the journal entry on Subsidiary payments received when the Subsidiary G/L accounts for refunds for this subsidiary and campus have not been filled in. e. Debit side of the journal entry on Subsidiary negative payments received, NSF payments, and voids of payments received for this bank when the Subsidiary G/L accounts for Disbursements for this subsidiary and campus have not been filled in. f. Debit side of the journal entry on Subsidiary refunds when the Subsidiary G/L accounts for refunds for this subsidiary and campus have not been filled in.
NSF Pending Account	a. Credit side of the journal entry for Returned Checks positive payments previously received. b. Debit side of the journal entry for Returned Checks on negative payments previously received. c. An entry must be done in CampusVue Finance, HR & Payroll to offset the NSF Pending Account to the appropriate Cash account. This is typically performed in the bank reconciliation adjustment screen. d. Use the NSF Pending Account when a check is returned and recorded in CampusNexus Student.
Deposits Pending Account	a. Debit side of the journal entry on Student Ledger payments received for this bank that is either not connected to a fund source, or the fund Source Disbursements G/L account for the corresponding fund source and campus has not been filled in. b. Credit side of the journal entry on negative Student Ledger payments received, and voids of payments received for that bank, that are either not connected to a fund source, or the fund Source Disbursements G/L account for the corresponding fund source and campus has not been filled in. c. Debit side of the journal entry on Subsidiary payments received when the Subsidiary G/L accounts for Disbursements for this subsidiary and campus have not been filled in. d. Credit side of the journal entry on negative Subsidiary payments received and voids of payments received on that subsidiary for this bank. e. Debit side of the journal entry on positive Miscellaneous Receipts. f. Credit side of the entry on negative Miscellaneous Receipts. g. Use the Deposits Pending Account when payments are entered in CampusNexus Student.

7. Click next to the applicable field to look up account numbers for the **GL Debit Account**, **GL Credit Account**, **NSF Pending Account**, and **Deposits Pending Account** fields. The power search form is displayed. Click **Begin Search**.



8. Double-click the desired ledger account. CampusNexus Student copies the contents to the field next to the find icon that was clicked.

   For example, the GL Debit Account find icon was clicked, and then the MAIN4153 ledger account cell was double-clicked on the **CampusVue Finance, HR & Payroll Ledger Accounts Search** form. CampusNexus Student copies the ledger account to the GL Debit Account field on the **Account Setup** form.



If the **GL Debit** or **GL Credit** account is invalid based on current fiscal year and ledger for the appropriate Journal Entry Group, the field is highlighted in red. The account must be corrected before modifications can be saved.

9. Click **OK** to close the CampusVue Finance, HR & Payroll Ledger Accounts Search form and return to the Account Setup form.

   The remaining fields on the Account Setup form provide the following data:

   - **Currency** – This field is displayed only if more than one currency is used in CampusVue Finance, HR & Payroll.
   - **Deposit Identifier Format** – This value is configured in CampusVue Finance, HR & Payroll and viewed from the drop-down list in CampusNexus Student.
   - **Direct Deposit Origin #** – This is the value that your bank wants in positions 14 through 23 of the NACHA File Header Record. It is typically your Federal Tax Identification Number or a bank assigned number. It is used in CampusVue Finance, HR & Payroll.
   - **Last Check #** – This field is populated during the check printing process, and can be edited to set a default check number. This field is read from and written to CampusVue Finance, HR & Payroll.
   - **Last Direct Deposit #** – This field is populated during direct deposit process.

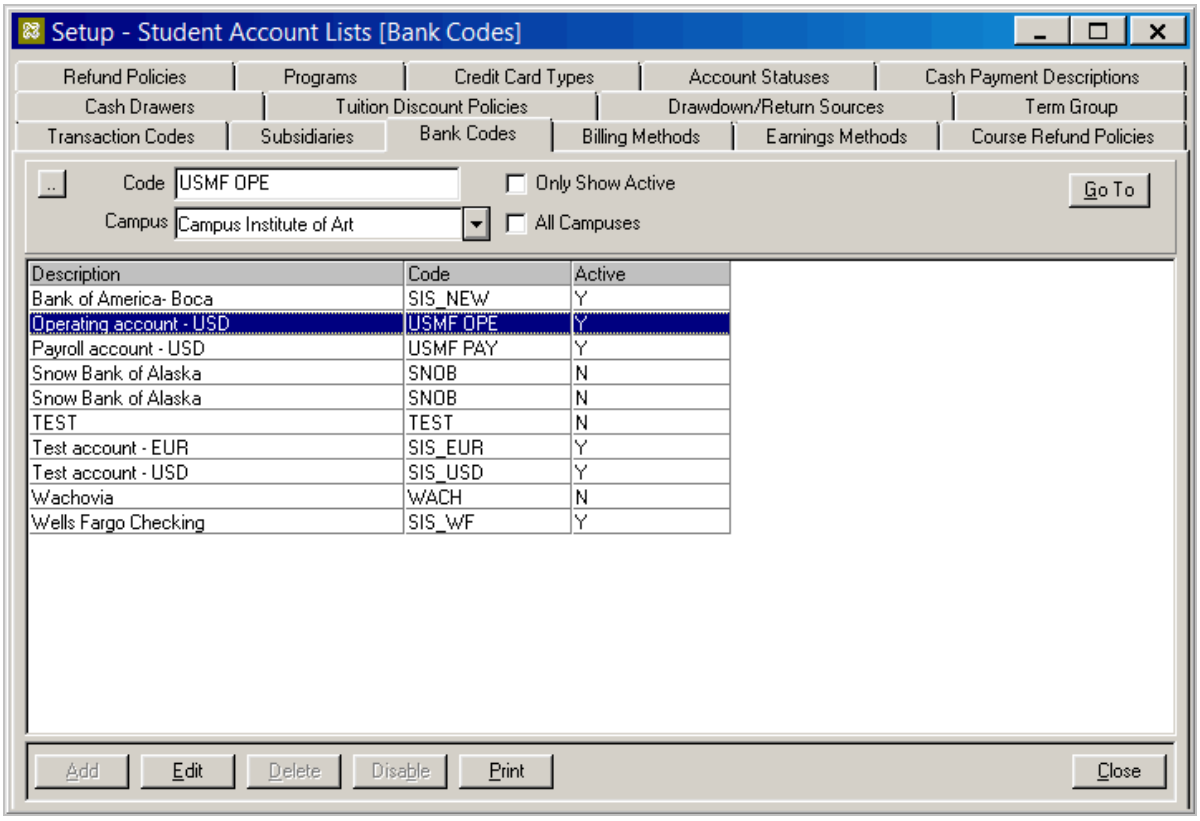
10. Click **Save** and close the form.

CampusNexus Finance, HR & Payroll

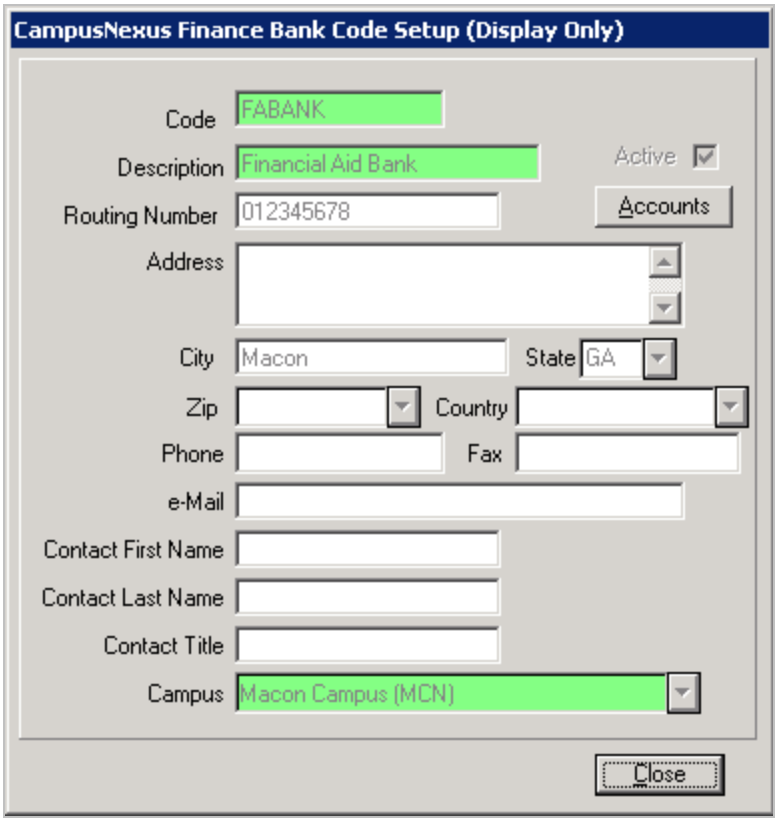
When CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll, bank accounts and bank codes are created in the accounting system and transferred to CampusNexus Student.

To view bank information created in CampusNexus Finance, HR & Payroll and to edit CampusNexus Student bank account specific fields:

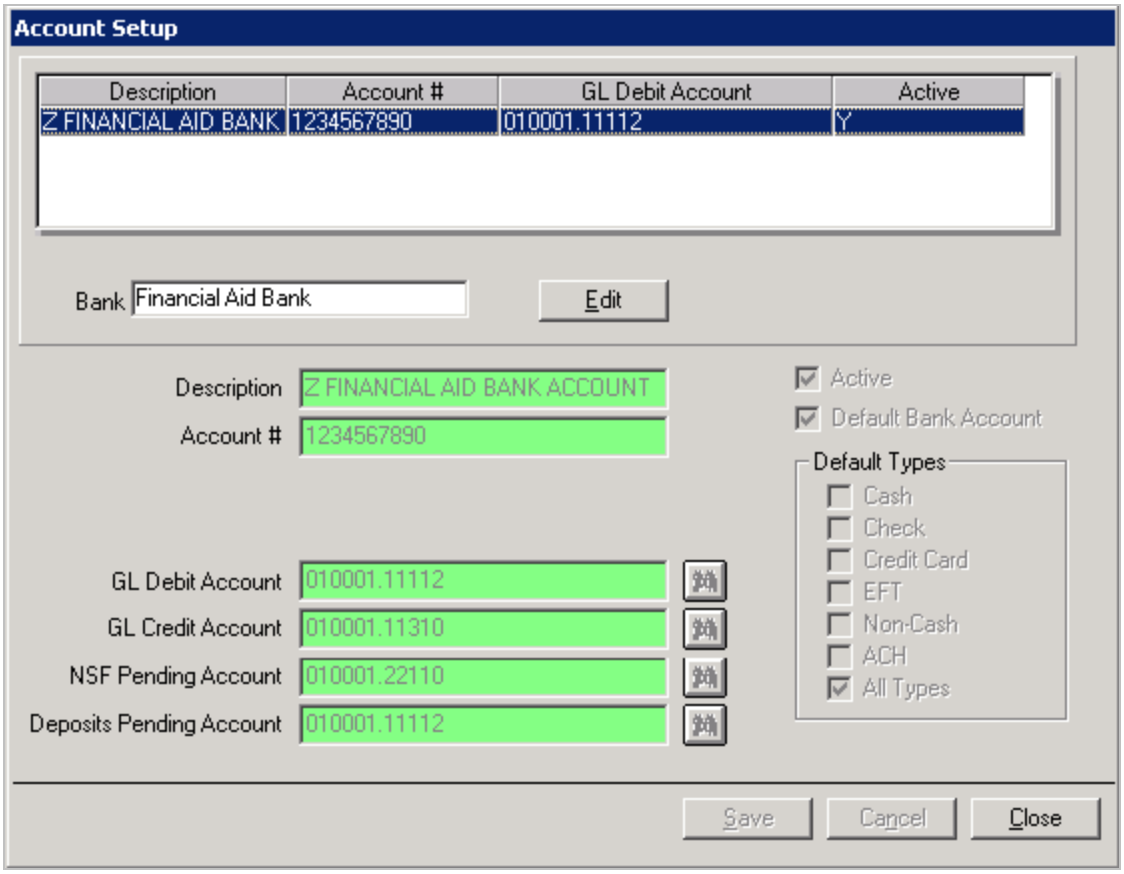
1. Navigate to **Lists > Student Accounts > Setup - Student Accounts Lists > Bank Codes** (tab). The Setup - Student Account Lists [Bank Codes] form displays the list of bank codes that were created in CampusNexus Finance, HR & Payroll.



2. Select an account and click **Edit**. The CampusNexus Bank Code Setup (Display Only) form is displayed. This form presents read-only bank information that was set up in CampusNexus Finance, HR & Payroll.



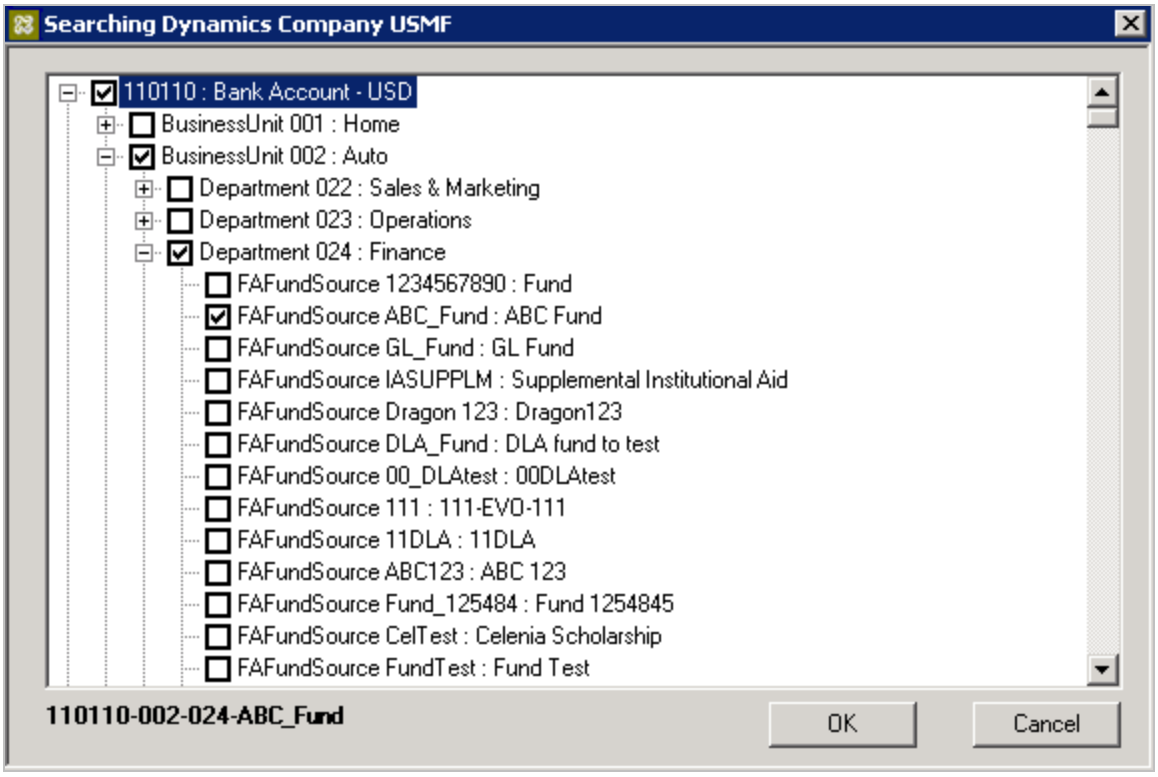
3. Click the **Accounts** button. The Account Setup form is displayed.



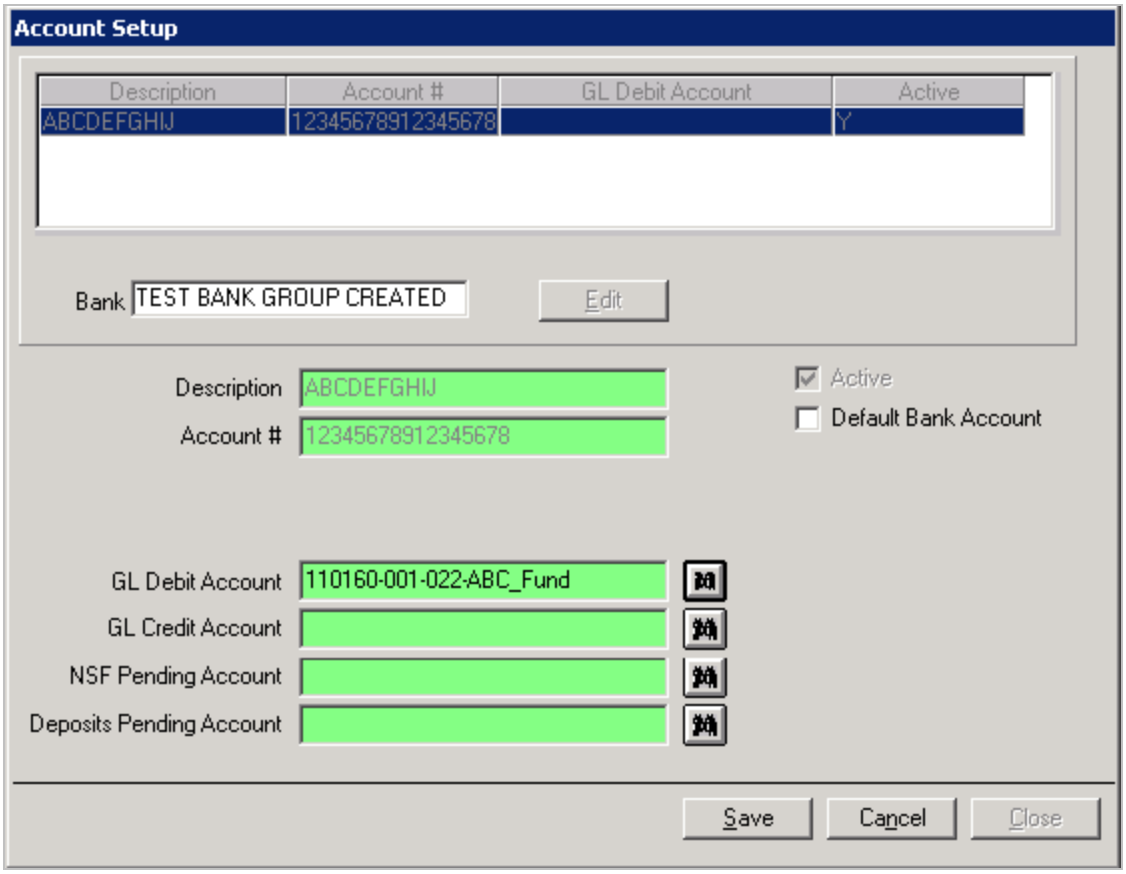
4. To edit the account information, click **Edit** and click the **Find** icon next to an account field. CampusNexus Student performs a power search and retrieves a list of GL accounts that can be associated with the account fields.

   The permissions assigned to the user in CampusNexus Finance, HR & Payroll determine which GL accounts the user can view in CampusNexus Student. The Main account node can be displayed at any level in the account hierarchy. This is based on the account structure setting that is configured in Microsoft AX. For information about this setting, your administrator must see Microsoft AX Help.

   When you click **Save** after selecting the account, the system validates your selection against the account structure setting in Microsoft AX. This validation also occurs when transactions are released to G/L.



5. Select a GL Account string combination from the list and click **OK**. The GL account string for the selected entity is displayed in the Account Setup form. If applicable, select the **Default Bank Account** check box.



6. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Note: When CampusNexus Student and CampusNexus Finance, HR & Payroll are integrated, CampusNexus Finance, HR & Payroll populates the GL Debit Account field in CampusNexus Student automatically when a bank account is added or updated in CampusNexus Finance, HR & Payroll. Since this data originates in CampusNexus Finance, HR & Payroll, the actual GL Debit Account field is therefore uneditable when reviewed in CampusNexus Student.

Setup - Student Account Lists [Billing Methods]

CampusNexus Student offers several methods for billing students for tuition and other charges. You can set up billing variations if you have different methods for different programs. If working with Dual or "Connected" Enrollments, please see Dual Enrollment Automated Rate Schedule Billing Setup for Tuition.

The billing method setup allows rate schedules to be specified for each billing code. In addition, rate schedules can be defined for each campus. These features provide maximum flexibility for multi-campus institutions when billing their students. The billing logic in CampusNexus Student allows a student to be billed for the same term at multiple campuses. Ledger cards can be filtered by campus. Deferred revenue is also campus-specific. One student may be earning revenue concurrently at multiple campuses.

The billing grid displays the number of units "over" value. This value is used when billing by credits or hours as the units. For example, the institution charges a flat rate of $1000.00 plus $150.00 for each credit over 12 credits.

Under certain circumstances, you can turn on automatic billing. That is, when the student is enrolled in a program version or when the student is registered for a course, the cost can be automatically billed to the student. For the other billing methods, you must use the Registration Billing wizard.

Billing methods can be based on Program / Enrollment, Academic Year, Term / Quarter, Course and Payment Period. In addition, some methods can use the rate table approach, wherein you provide ranges of credits, hours, numbers of courses, or levels of courses. You can enter a flat dollar amount and/or an amount per unit (credit, hour, or course) within the range.

The Billing Methods Code Setup form enables you to set up different costs per campus, transaction type, and course level. You can select how the costs for the billing method will be entered, "All Campuses / Same Rates" or "Specify Campus". Once this is established, the setting will affect all costs entered for each transaction code.

Note: When "By Campus" is selected, any change to this setting affects ALL billing codes for the billing method. Select this option only once and do not change it. If it is changed, you need to re-enter all cost grids for each billing code.

A list box of all the billing codes is included. This list box defaults to TUIT when you are adding a new billing method. You can edit the amounts for the tuition and then save. After saving, you can select a different billing code and set up the costs associated with that code. Click Save to save the costs for that code.

When you begin to edit the costs grid, the Save and the Cancel buttons are enabled and the Close button is disabled. You must save or cancel the edit before you select a different billing code.

The billing methods you set up for your institution using these procedures are used in the other Student Accounts list "Programs". In the "Programs" list, you select a billing method for each program version and enter any additional charges (books, supplies, and so on).

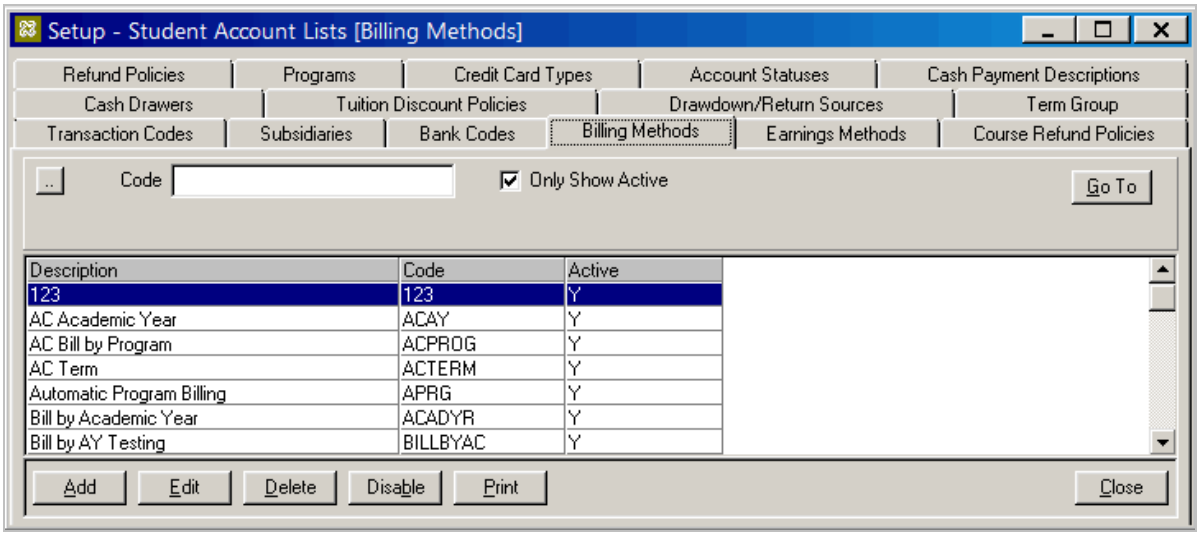
The billing method you select determines how your revenue is recognized (See also Reverse Revenue Recognition.) If your Revenue Basis (Earning Unit) is *months*, the following values apply:

- If you are Billing by Term, the Total Earning Units are Months in the Term.
- If you are Billing by Credits, the Total Earning Units are Number of Credits in the Program.
- If you are Billing by Hours, the Total Earning Units are Hours in the Term.

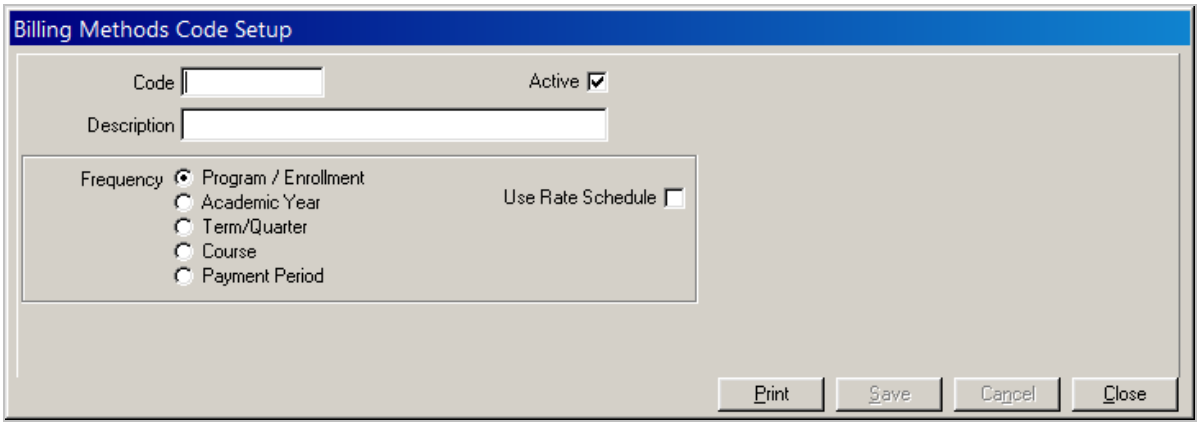
You may add or edit billing methods. See also Earning Methods.

To add a billing method code:

1. Navigate to **Lists** > **Student Accounts**. The Setup - Student Accounts Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Billing Methods**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**.
6. If you selected the **Add** option to add a new billing method, only the top portion of the Billing Methods Code Setup form is displayed. The bottom portion of the form is displayed only when the Use Rate Schedule check box is selected.



7. Specify a unique **Code**. The Code can be up to eight alphanumeric characters.
8. Enter a **Description**. The Description can be up to 22 alphanumeric characters.
9. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
10. Select the **Frequency** of the billing. Each Frequency option has certain characteristics associated with it. See

Program / Enrollment, Academic Year, Term / Quarter, Course, and Payment Period for additional information.

11. Click **Save** if you are not using a rate schedule for the billing method.
12. When you select the **Use Rate Schedule**check box, the bottom section of the form is displayed, where you select additional settings depending on the Frequency option selected. Select the check box if the billing method is based on the rate schedule. See the Use Rate Schedule below.
13. After you have specified the campus, transaction code selection, rate schedule information and clicked Save, you can print a report by clicking the **Print** button.
14. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

To edit a billing method code:

1. Navigate to **Lists > Student Accounts > Billing Methods >** select a billing method > **Edit** (button).
2. If you selected the **Edit** option to modify an existing billing method, both sections of the form are displayed containing the previous selections. See Program / Enrollment, Academic Year, Term / Quarter, and Course for the applicable Frequency selection, and the Use Rate Schedule sections below.
3. Change the information as desired, and then click **Save**.
4. When you select the **Use Rate Schedule** check box, the bottom section of the form is displayed, where you select additional settings, depending on the Frequency option selected. Select the check box if the billing method will be based on the rate schedule. See the Use Rate Schedule below.
5. Click **Print** to print a report.

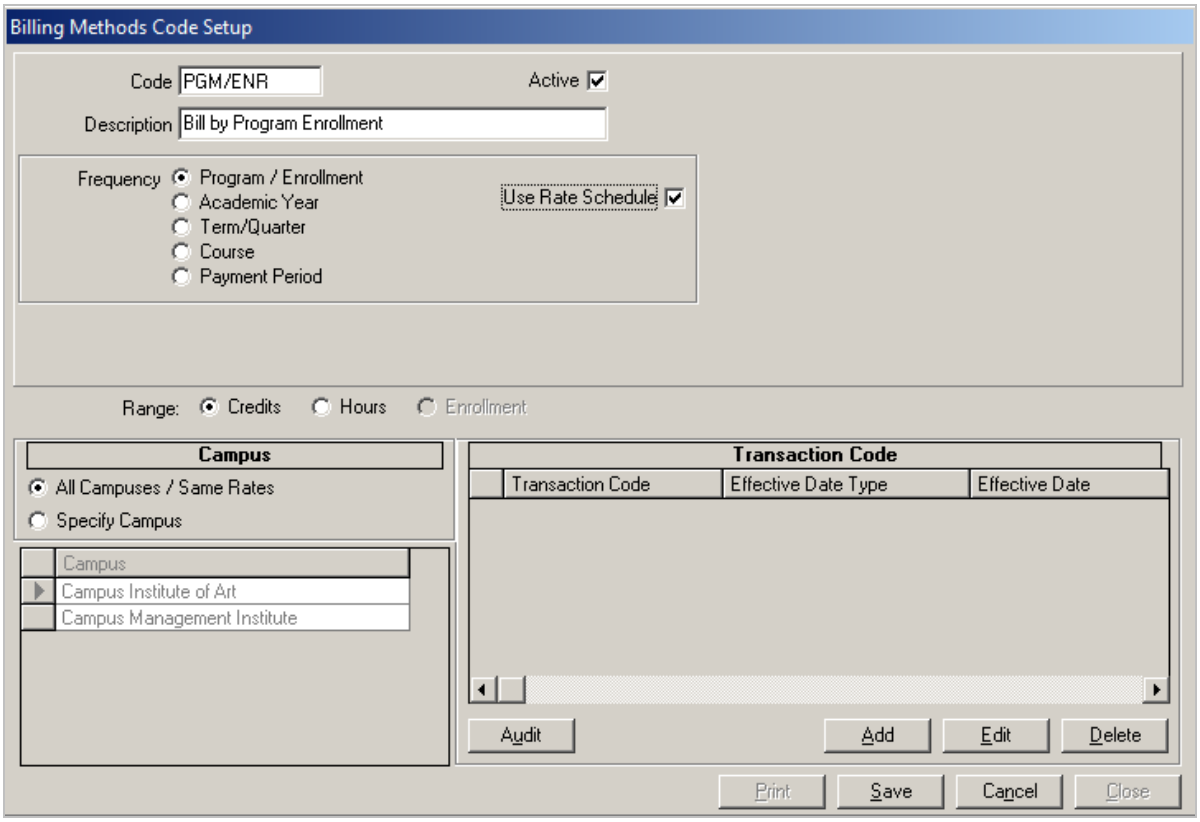
Program / Enrollment

If you do not use the rate schedule, the charge for the billing comes from the program version record. In either case, the charge is entered on the student's Ledger Card when the enrollment is processed. The rate schedule will be used in this example.

1. Select **Program/Enrollment**.
2. Select **Use Rate Schedule** if the billing method will use a rate schedule. Range options are Credits or Hours.

   Selecting Use Rate Schedule on the Billing Methods Code Setup form enables and displays the bottom section of

the form, where you can make additional selections, depending on the Frequency option selected.



Academic Year

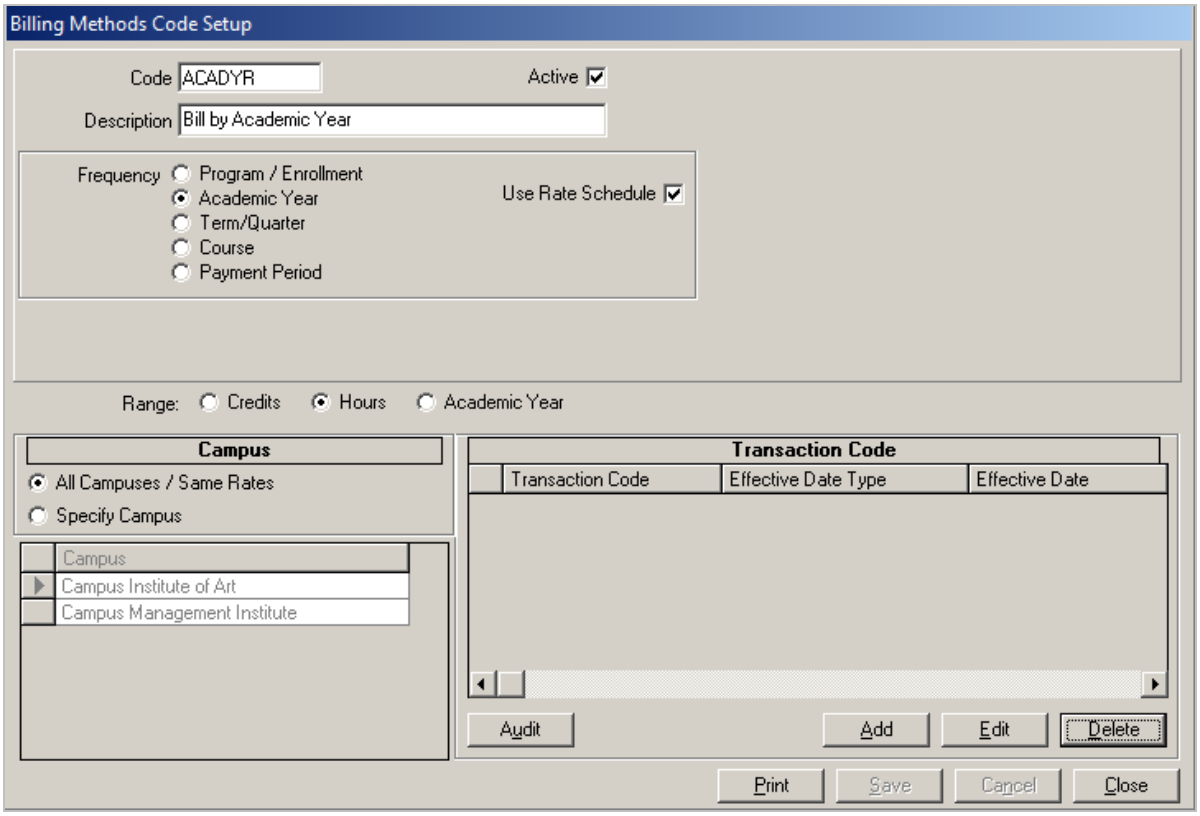
The Academic Year option **requires** the use of the rate schedule.

Note: When a program version is set to earn by academic year, you can configure the number of units to earn throughout each academic year. CampusNexus Student performs the revenue recognition process ignoring the usual calculation of units and using the override to earn as configured.

1. Select **Academic Year**.
2. Select **Use Rate Schedule**. Range options are Credits, Hours, and Academic Year.

   Selecting Use Rate Schedule on the Billing Methods Code Setup form enables and displays the bottom section of

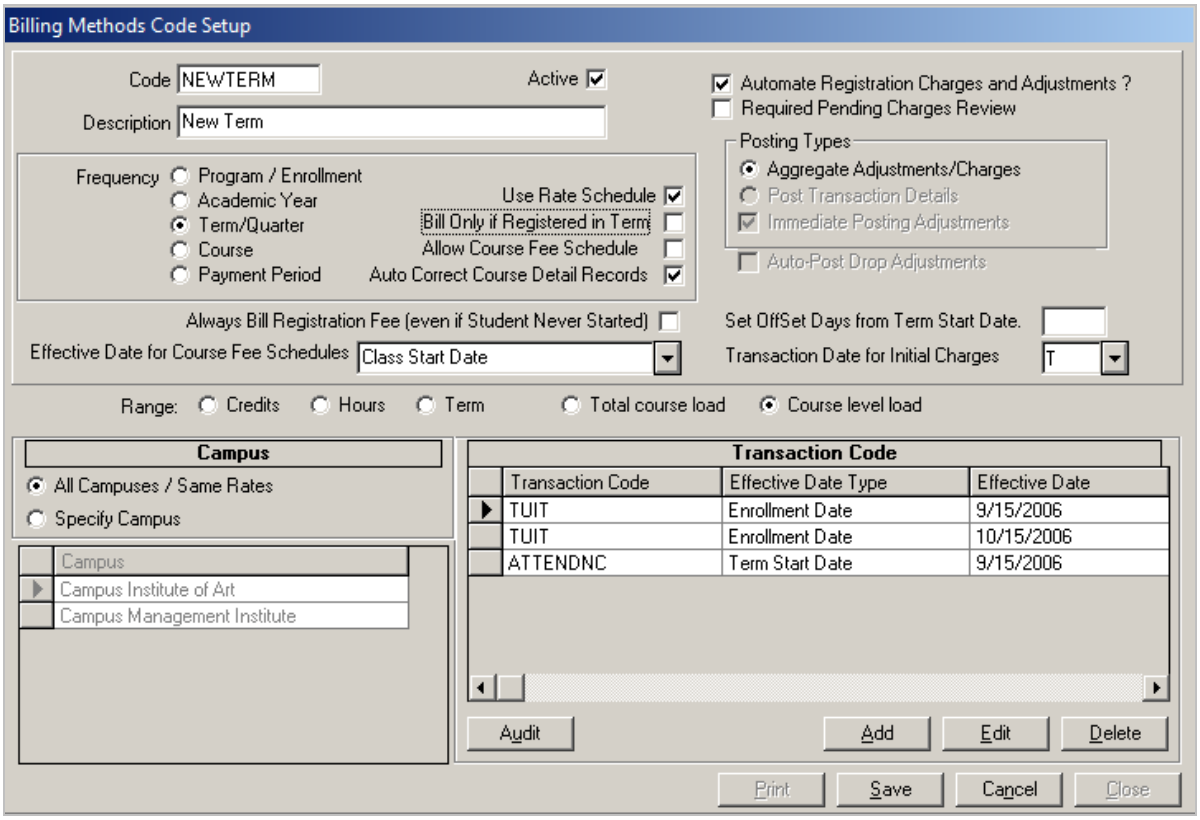
the form, where you can make additional selections, depending on the Frequency option selected.



Term / Quarter

If you selected the Use Rate Schedule option, the Automate Registration Charges and Adjustments? check box is enabled and the bottom section of the Billing Methods Code Setup form is displayed, where you may make additional selections depending on the Frequency option selected. With automation turned on and using a rate schedule, users can bill a student more than once per term. If a student is billed more that once per term and the billing method is a rate schedule using flat amounts, the billing details tab are updated upon registration for any transaction code if the overall amount of the flat fee does not change. This is to break down the amount of the overall charge per course.

If you do not select Use Rate Schedule, the cost to be billed to the student is taken from the student's enrollment fee schedule.



1. Select **Term/Quarter** in the Frequency section.
2. Select **Use Rate Schedule** if desired. Range options are Credits, Hours, Term, Total Course Load, and Course Level Load.
3. Select **Bill Only if Registered in Term** if desired. When selected, only students who have classes registered for the term being processed are billed.
4. Select **Allow Course Fee Schedule** to determine if a fee schedule can be selected when registering students for classes. The check box is hidden if the Frequency methods are Program / Enrollment or Academic Year. Selecting this check box allows the Registrar to select a course fee schedule while registering a student for a course.

   If this check box is not selected, the Registrar cannot select a fee schedule during registration. The ability to specify a fee schedule for a course section exists (provided more than one fee schedule is configured for a course), regardless of the configuration of the Allow Course Fee Schedule check box on the billing method.

   System administrators can designate that a billing method allows a course to be billed using a course fee schedule. The Allow Course Fee Schedule check box in only available for billing methods using the frequency Term/Quarter, with a rate schedule and Course (**Lists** > **Student Accounts** > **Billing Methods** > **Add/Edit** > **Billing Methods Code Setup** > select **Term/Quarter** > select **Use Rate Schedule**).

   When the billing method is configured to use fee schedules,CampusNexus Student can bill a course using both the fee schedule and the rate schedule with the fee schedule having precedence over the rate schedule.

   The billing method feature follows a hierarchy system to accommodate the default fees found on the Course Section, Rate Schedule, and Course Fee forms.

   Hierarchy when using Frequency of Term/Quarter and Use Rate Schedule:

a. Section or Course Fee Schedule assigned at Course Registration - student
b. Rate Schedule
c. Course Fee Schedule assigned as the default on the course

For example, prior to billing a student who has Term/Quarter and Use Rate Schedule configured, CampusNexus Student compares the transaction codes on the course section fee schedule, the rate schedule, and the course fee schedule. If the same transaction code is found on all three forms, CampusNexus Student uses the transaction code charge specified on the course section fee schedule, and then ignores the transaction code charge found on the rate schedule and course fee schedule. While comparing transaction codes, if a transaction code exists on the default course fee schedule but does not exist on the default course section fee schedule or rate schedule (because this fee is a unique transaction code), CampusNexus Student bills the unique transaction code charge found on the default course fee schedule. When calculating the rate charge for the transaction code using the rate schedule, CampusNexus Student omits that course from the rate schedule calculations.

Hierarchy when using Frequency of Course:

a. Section or Course Fee Schedule assigned at Course Registration - student
b. Course Fee Schedule assigned as the default on the course

Prior to billing a student who has **Course** configured, CampusNexus Student compares the transaction codes on the course section fee schedule and the course fee schedule. If the same transaction code is found on both of the two forms, CampusNexus Student uses the transaction code charge specified on the course section fee schedule, and then ignores the transaction code charge found on the course fee schedule. While comparing transaction codes, if a transaction code exists on the default course fee schedule but does not exist on the default course section fee schedule (because this fee is a unique transaction codeCampusNexus Student bills the transaction code charge found on the default course fee schedule.

Using the hierarchy system mentioned above, the system administrator can prevent a fee from being charged by adding the same transaction code with a zero amount in a higher level of the hierarchy.

5. Select **Auto Correct Detail Course Records** if applicable (check box is cleared by default). Selecting this option enables an automated procedure (auto correct job) that assesses the total amount billed for bill codes set up on the rate schedule and adjusts/creates detail support records per course for the courses comprising the charge.

   Notes:

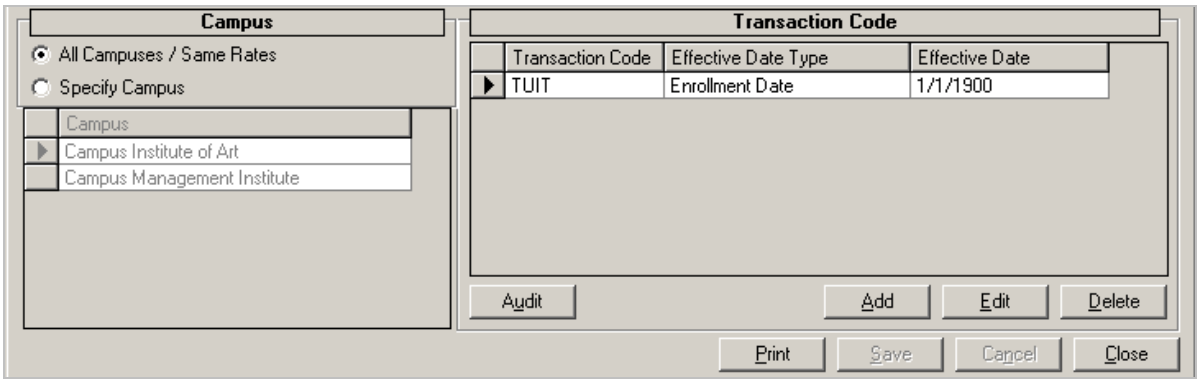
   - This check box is only visible for payment period or term billing methods that Use Rate Schedule and that do not Post Transaction Details (i.e., aggregate billing methods).
   - Billing methods with this check box selected are used in the auto correct job. After a register/unregister/drop operation, an item is added to the queue so that it is processed by the job.
   - Selecting this check box disables the Immediate Posting Adjustments check box and sets its value to selected. This is because the billing methods that are included in the auto correct job **must** have auto-posting of register records after a rebilling.
   - If both Auto Correct Detail Course Records and Required Pending Charges Review are selected, you will only be able to review the initial posting of charges for the selected time frame; subsequent reviews of pending charges will not be possible.

6. Select the **Effective Date for Course Fee Schedules** to be used for evaluating Course Fee Schedules and Course Fees that are not set up on a rate schedule. If Student Enrollment Date is selected, CampusNexus Student only bills students based on fees that are configured with an effective date prior to the student's enrollment date. If Class Start Date is selected, CampusNexus Student only bills students based on the fees configured with an effective date prior to the student's class start date.

Institutions can configure multiple fee schedules for a course. Each fee schedule consists of multiple individual course fees. If the institution previously defined any fees for the course prior to implementing this new feature, CampusNexus Student moved all fees into one new fee schedule and labeled it as the Original Fee Schedule. The default sort order on this form is the Fee Schedule Code. When a course fee schedule is highlighted,CampusNexus Student displays all fees assigned to that fee schedule.

7. Select **Always Bill Registration Fee (even if Student Never Started)** if desired. When selected, this causes the REG bill code to be charged to students who have school statuses of **N** or **W**, provided the REG bill code is set up as part of the rate schedule OR is set up in the students' fees folders

Use Rate Schedule

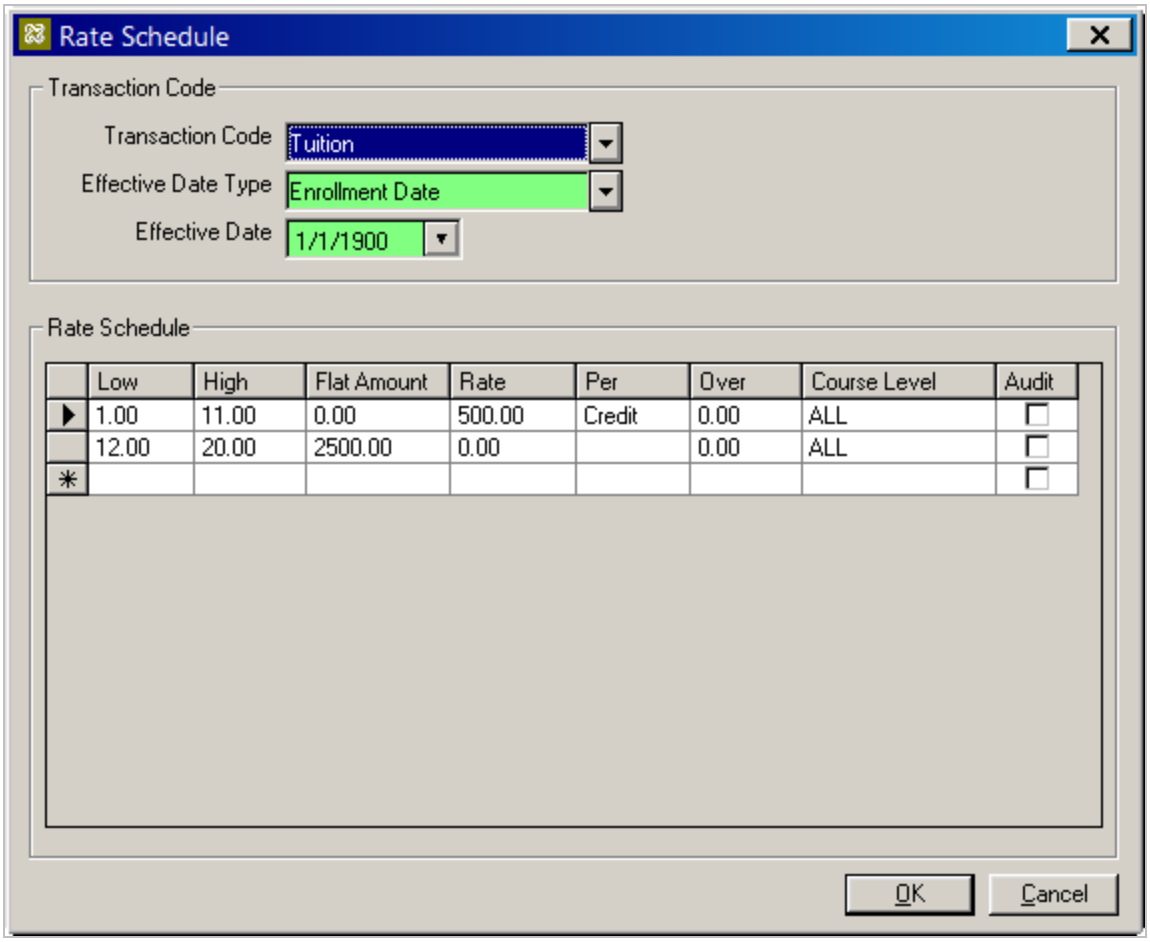


1. Campus - Select **All Campuses / Same Rates** or **Specify Campus**. If you select **Specify Campus**, click the campus to which the rates apply.
2. Transaction Code - Click the **Add** button to add a transaction code, or select an existing transaction code and click the **Edit** button to make changes, or select an existing transaction code and click the **Delete** button to remove a transaction code. Set the rate schedule for each transaction code as required.
3. When you click **Add** or **Edit**, the Rate Schedule form is displayed.
4. Click **Audit** to review or monitor changes made to the rate schedules.

Rate Schedule Form

The Rate Schedule form is displayed when Add or Edit is clicked on the Billing Methods Code Setup form. Multiple rate schedules may be set up per transaction code, and each rate schedule is defined by an effective date type and effective date. Registration Billing and Process Pending Charges/Adjustments evaluate the effective date types and effective dates for rate schedules.

To use the effective date type/effective date configuration, select an Effective Date Type and Effective Date from the respective drop-down lists; otherwise, the default for the Effective Date Type is Enrollment Date and the Effective Date is set to 01/01/1900.



1. From the **Transaction Code** list, select a transaction code.
2. From the **Effective Date Type** list, select an effective date type. The options are:
   - Code E - Enrollment Date
   - Code S - Expected Start Date
   - Code T - Payment Period Start Date
   - Code R - Class Start Date

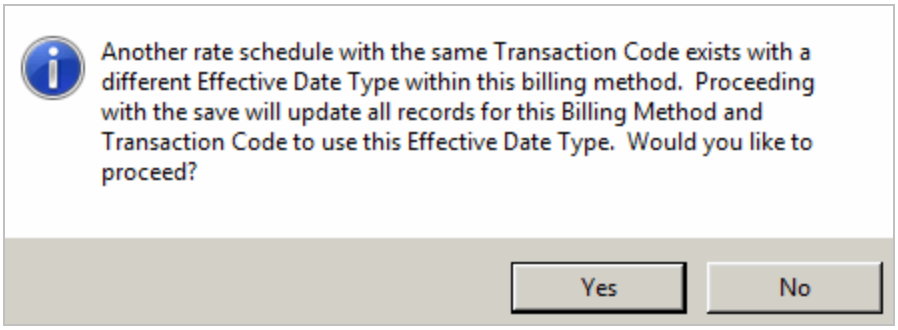
   Note: The Class Start Date option is available only for non-term payment period (detailed) billing; it does not apply to billing by term or academic year (aggregate billing).

   CampusNexus Student evaluates the effective date type/rate schedule configuration to determine which rate schedule to use, based on effective date when billing the student.

   Note: Multiple rate schedules may be set up per transaction code. Each rate schedule is defined by an effective date type and effective date. However, the following rules apply:

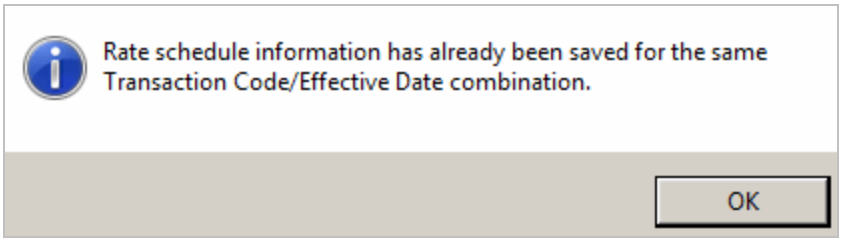
   - Only one effective date type can be defined per transaction code.
   - If more than one rate schedule is defined for a transaction code, all rate schedules for that transaction code must use the same effective date type.
3. The following message is displayed when you attempt to edit an **Effective Date Type** for one of the rate schedules associated with the transaction code. If you select **Yes**, all rate schedules for the transaction code are updated to

the new effective date type; otherwise, you are returned to the Rate Schedule form, and the new Effective Date Type is not saved.



4. Select or enter an effective date in the **Effective Date** field.
5. In the Rate Schedule grid, enter appropriate data:
    - **Low** - the low end of the range of units (credits, hours, or courses).
    - **High** - the high end of the range of units.
    - **Flat Amount** - An amount to be added to the value of Rate multiplied by units.
    - **Rate** - A dollar amount to be multiplied by the number of units.
    - **Per** - The units by which the Rate is multiplied to get the amount to be charged. Units can be credits, hours, or courses.
    - **Over** - The value to be used when billing by credits or hours as the units. For example, the institution charges a flat rate of $1000.00 plus $150.00 for each credit over 12 credits.
    - **Course Level** - This drop-down list box shows all defined course levels for the institution.
    - **Audit** - Specify whether the rate schedule is applicable for course Audit course, by selecting or clearing the check box. You can set up a flat rate or schedule for the course taken as Audit, as is done with a Full Credits course.

Note: If you attempt to create the same Transaction Code/Effective Date combination, the following message is displayed. Click **OK** and select another Transaction Code/Effective Date combination to continue processing.



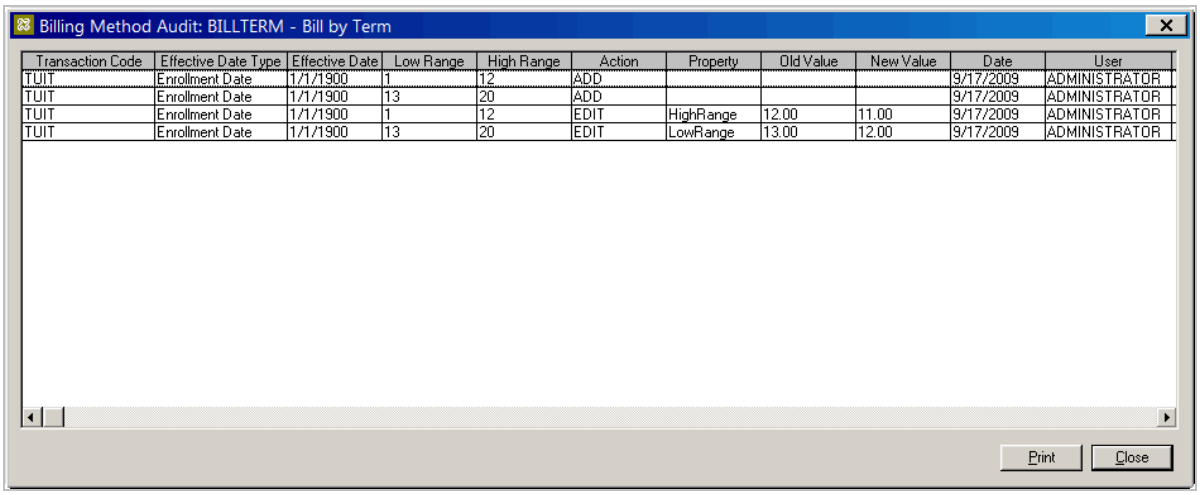
Note: The Flat rate is not applied to billing by **Term/Quarter** with a rate schedule charged on Attendance; rather, the 'Per' unit must be the same for all rate schedules. For example, credits, hours, or courses for the ranges must be used with this feature.

When the billing method frequency is set to Payment Period and Post Transaction Details is selected, data entry on the Rate Schedule form is restricted because tiered rate schedules are not supported for this billing method configuration.

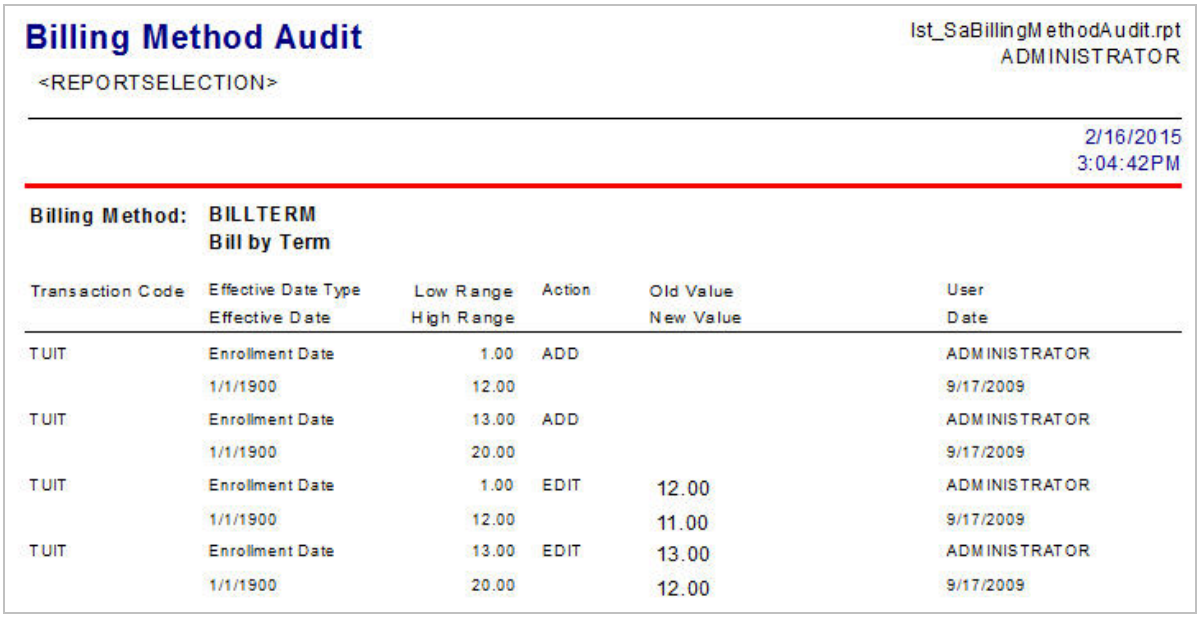
- The High and Low columns will be disabled and data locked to 1 to 999 regardless of the unit selected.
- The Flat Amount column will be locked and the value defaulted to zero.

Audit Rate Schedules

Click the **Audit** button. The Billing Methods Audit form is displayed. Any changes to a rate schedule are posted here where they may be monitored.



Click the **Print** button to view the Billing Method Audit report.



Billing Method Audit

lst_SaBillingMethodAudit.rpt
ADMINISTRATOR

<REPORTSELECTION>

2/16/2015
3:04:42PM

Billing Method: **BILLTERM**
Bill by Term

Transaction Code	Effective Date Type / Effective Date	Low Range / High Range	Action	Old Value / New Value	User / Date
TUIT	Enrollment Date	1.00	ADD		ADMINISTRATOR
	1/1/1900	12.00			9/17/2009
TUIT	Enrollment Date	13.00	ADD		ADMINISTRATOR
	1/1/1900	20.00			9/17/2009
TUIT	Enrollment Date	1.00	EDIT	12.00	ADMINISTRATOR
	1/1/1900	12.00		11.00	9/17/2009
TUIT	Enrollment Date	13.00	EDIT	13.00	ADMINISTRATOR
	1/1/1900	20.00		12.00	9/17/2009

Important Information

Course Level Load: Course Level Load allows you to charge courses at the Level selected on the course and defined on the rate schedule. Multiple course levels can be defined along with the 'ALL' level (the system default). When setting up a rate schedule using Course Level Load, the 'ALL' level will include all courses set at 'ALL' level as well as any other course levels not defined on the rate schedule.

For example, the rate schedule has an entry for the 'ALL' level as well as an entry for the 100 Level. A student is taking three 4-credit courses: BIO101 with a course level of '100', ENG101 with a course level of '200', and MATH101 with a level of 'ALL'. In this example, BIO101 will bill using the rate schedule entry for the '100' level that encompasses 4 credits while the courses

ENG101 and MATH101 will use the rate schedule entry for the 'ALL' level that encompasses 8 credits (4 credits on 2 courses) to calculate charges. **Note**: The 200 course level is not defined on the rate schedule and therefore will use the 'ALL' level entry.

Total Course Load: Total Course Load expands upon Course Level Billing in that the total number of credits registered is used to determine the entry on the rate schedule but then uses that rate for the credits registered for that level. In the above example, the courses are still using the same levels on the rate schedule, however each level will use the dollar amount entry that encompasses 12 credits, then multiply the dollar amount by the number of credits in that level.

Billing Example

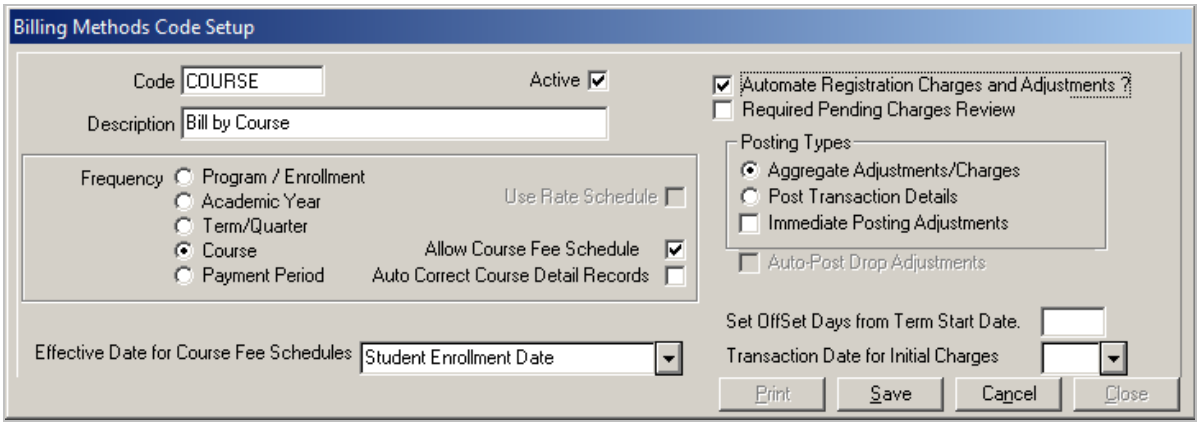
'100' Level	'ALL' Level
1 - 6 credits @ $300	1 - 6 credits @ $310
6 - 12 credits @ $290	6 - 12 credits @ $295

For Total Course Load the student would be billed 4 credits @ $290 for the '100' level, and 8 credits @ $295 for the 'ALL' level.

Note: Courses billed from a course fee schedule would not be used in rate schedule billing.

Course

This option can be billed automatically. This means that as soon as the student registers for the course (class section), a charge is posted to the student's ledger card. The rate is taken from the fees set up in the Courses list.



1. Select the **Course** option in the Frequency section. Notice the Allow Course Fee Schedule check box is displayed.

   Select the Allow Course Fee Schedule check box to determine if a fee schedule can be selected when registering students for classes. The check box is hidden if the Frequency methods are Program / Enrollment or Academic Year. Selecting this check box allows the Registrar to select a course fee schedule while registering a student for a course. If this check box is not selected, the Registrar cannot select a fee schedule during registration. The ability to specify a fee schedule for a course section exists (provided more than one fee schedule is configured for a course), regardless of the configuration of the Allow Course Fee Schedule check box on the billing method.

   System administrators can designate that a billing method allows a course to be billed using a course fee schedule. The Allow Course Fee Schedule check box is only available for billing methods using the frequency Term/Quarter, with a rate schedule and Course (Lists > Student Account > Billing Methods > Add/Edit > Billing Methods Code Setup > select Term/Quarter > select Use Rate Schedule).

   Hierarchy when using Frequency of Course:

   a. Section or Course Fee Schedule assigned at Course Registration - student
   b. Course Fee Schedule assigned as the default on the course

Prior to billing a student who has **Course** configured, CampusNexus Student compares the transaction codes on the course section fee schedule and the course fee schedule. If the same transaction code is found on both of the two forms, CampusNexus Student uses the transaction code charge specified on the course section fee schedule, and then ignores the transaction code charge found on the course fee schedule. While comparing transaction codes, if a transaction code exists on the default course fee schedule but does not exist on the default course section fee schedule (because this fee is a unique transaction code), CampusNexus Student bills the transaction code charge found on the default course fee schedule.

Using the hierarchy system mentioned above, the system administrator can prevent a fee from being charged by adding the same transaction code with a zero amount in a higher level of the hierarchy.

2. Select the Automate Registration Charges and Adjustments? check box to enable all fields on the right side of the form.
3. Select an **Effective Date for Course Fee Schedules** from the drop-down list. The available options are Student Enrollment Date and Class Start Date.
4. The **Automate Registration Charges and Adjustments** field is enabled when you select **Term/Quarter** or **Course** for Frequency. You must select the check box to enable automatic registration billing and automated adjustment of fees in the Student Ledger card. If you select this option, any time a student is registered or unregistered from a course, the change is displayed in the Student Ledger as a pending charge/adjustment.

   An SQL job, Process Automated Registration Billing, posts pending charges/adjustments to the Ledger Card. This job runs every two hours by default. If you select Required Pending Charges Review, the SQL job does not post charges or adjustments automatically.

   If effective date types and effective dates are used, they will be considered during the billing process.
5. Select the **Required Pending Charges Review** check box to Process Pending Charges/Adjustments before they are posted to the Student Ledger card.

Posting Types:

Automated posting of charges and adjustments to the **Ledger Card** is accomplished by an SQL job, Process Automated Registration Billing, that runs every two hours by default. Posting types are based on school-defined preferences.

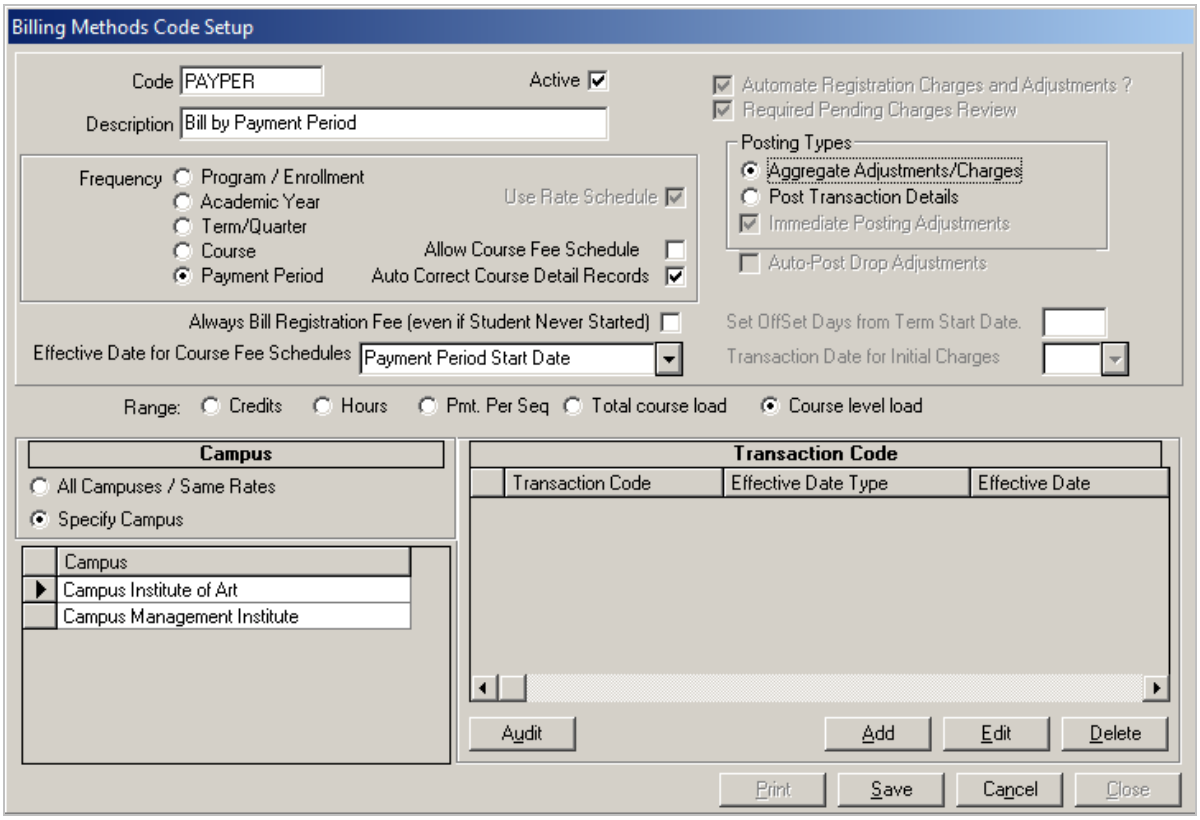
6. Select the **Aggregate Adjustments/Charges** check box to see one record per bill code per term in the Student Ledger Card. If this feature is enabled, details can be viewed in the View > Student Accounts > Ledger Card > Transaction Detail button > Other Information tab. If the Immediate Posting Adjustments option is not selected, the adjustments are posted at the end of drop/add. If drop/add is not being used, the adjustments are posted at the end of the term. The benefit of this type of posting is a "less cluttered" Ledger Card.
7. Select the **Post Transaction Details** check box to see all records per bill code per term in the Student Ledger card. CampusNexus Student posts all details simultaneously at the end of the Add/Drop period. This is not an option if you are billing by Term/Quarter.

   Note: Selecting the Post Transaction Details option and a frequency of Payment Period enables payment period billing with course transaction details.
8. The **Immediate Posting Adjustments** check box is used after the initial billing for a time frame has occurred. Select this check box if the adjustments are to be posted to the ledger card immediately. If you do not select this option, the adjustments remain pending until the next time the SQL job runs. If you are using automated posting without a review, it is recommended that this check box be selected to ensure accurate course amount details.

   Note: The time period between SQL jobs defaults to two hours, but this can be reconfigured by CampusNexus Student Technical Support and your system administrator, according to your institution's requirements.

9. In the **Set Offset Days from Term Start Date** field enter the number of days before or after the start of the term that the institution wishes to perform initial registration billing. For example, type **-2** to indicate two days before the start of the term, and **2** to indicate two days after the start of the term. Enter **0**, the default value, in this field to perform initial registration billing on the term start date. If this field is left blank, initial registration billing occurs on the add/drop date defined at the term level. If there is no add/drop date defined at the term level, registration billing occurs at the end of the term.
10. The **Transaction Date for Initial Charges** list is displayed only when you bill by Course or Term/Quarter. This field determines which date is posted for registration billing on the student's ledger. The options are:
    - **S** - Use System Date
    - **T** - Use Term Start Date

Payment Period



Payment Period frequency forces Use Rate Schedule and Automate Registration Charges and Adjustments? selections to be enabled. The bottom section of the Billing Methods Code Setup form is enabled and displayed where you may make additional selections. With automation turned on and using a rate schedule, users can bill a student more than once per payment period. If a student is billed more than once per payment period and the billing method is a rate schedule using flat amounts, the billing details tab is updated upon registration for any transaction code if the overall amount of the flat fee does not change. This is to break down the amount of the overall charge per course.

1. Select **Payment Period** in the Frequency section.
2. Select **Allow Course Fee Schedule** to determine if a fee schedule can be selected when registering students for classes. Selecting this check box allows the Registrar to select a course fee schedule while registering a student for a course. If this check box is not selected, the Registrar cannot select a fee schedule during registration. The ability to specify a fee schedule for a course section exists (provided more than one fee schedule is configured for a

course), regardless of the configuration of the Allow Course Fee Schedule check box on the billing method.

When the billing method is configured to use fee schedules, CampusNexus Student can bill a course using both the fee schedule and the rate schedule with the fee schedule having precedence over the rate schedule.

The billing method feature follows a hierarchy system to accommodate the default fees found on the Course Section, Rate Schedule, and Course Fee forms.

Hierarchy when using Frequency of Payment Periods and Use Rate Schedule:

a. Section of Course Fee Schedule assigned at Course Registration - student
b. Rate Schedule
c. Course Fee Schedule assigned as the default on the course

For example, prior to billing a student who has Payment Period and Use Rate Schedule configured, CampusNexus Student compares the transaction codes on the course section fee schedule, the rate schedule, and the course fee schedule. If the same transaction code is found on all three forms, CampusNexus Student uses the transaction code charge specified on the course section fee schedule, and then ignores the transaction code charge found on the rate schedule and course fee schedule. While comparing transaction codes, if a transaction code exists on the default course fee schedule but does not exist on the default course section fee schedule or rate schedule (because this fee is a unique transaction code), CampusNexus Student bills the unique transaction code charge found on the default course fee schedule. When calculating the rate charge for the transaction code using the rate schedule, CampusNexus Student omits that course from the rate schedule calculations.

Hierarchy when using Frequency of Course:

a. Section or Course Fee Schedule assigned at Course Registration - student
b. Course Fee Schedule assigned as the default on the course

Prior to billing a student who has **Course** configured, CampusNexus Student compares the transaction codes on the course section fee schedule and the course fee schedule. If the same transaction code is found on both of the two forms, CampusNexus Student uses the transaction code charge specified on the course section fee schedule, and then ignores the transaction code charge found on the course fee schedule. While comparing transaction codes, if a transaction code exists on the default course fee schedule but does not exist on the default course section fee schedule (because this fee is a unique transaction code), CampusNexus Student bills the transaction code charge found on the default course fee schedule.

Using the hierarchy system mentioned above, the system administrator can prevent a fee from being charged by adding the same transaction code with a zero amount in a higher level of the hierarchy.

3. Institutions can configure multiple fee schedules for a course. Each fee schedule consists of multiple individual course fees. If the institution previously defined any fees for the course prior to implementing this new feature, CampusNexus Student moved all fees into one new fee schedule and labeled it as the **Original Fee Schedule**. The default sort order on this form is the **Fee Schedule Code**. When a course fee schedule is highlighted, CampusNexus Student displays all fees assigned to that fee schedule.
4. Select **Auto Correct Detail Course Records** if applicable (check box is cleared by default). Selecting this option enables an automated procedure (auto correct job) that assesses the total amount billed for bill codes set up on the rate schedule and adjusts/creates detail support records per course for the courses comprising the charge.

   Notes:

   - This check box is only visible for payment period or term billing methods that Use Rate Schedule and that do not Post Transaction Details (i.e., aggregate billing methods).

- Billing methods with this check box selected are used in the auto correct job. After a register/unregister/drop operation, an item is added to the queue so that it is processed by the job.
- Selecting this check box disables the Immediate Posting Adjustments check box and sets its value to selected. This is because the billing methods that are included in the auto correct job **must** have auto-posting of register records after a rebilling.
- If both Auto Correct Detail Course Records and Required Pending Charges Review are selected, you can only review the initial posting of charges for the selected time frame; subsequent reviews of pending charges will not be possible.

5. Select **Always Bill Registration Fee (even if Student Never Started)** if desired. When selected, this causes the REG bill code to be charged to students who have school statuses of **N** or **W**, provided the REG bill code is set up as part of the rate schedule OR is set up in the students' fees folders.

Automate Registration Charges and Adjustments

This field is enabled when you select **Payment Period** frequency. This option enables automatic registration billing and automated adjustment of fees in the Student Ledger card. Any time a student is registered or unregistered from a course, the change is displayed in the Student Ledger as a pending charge/adjustment.

An SQL job, Process Automated Registration Billing, posts pending charges/adjustments to the Ledger Card. This job runs every two hours by default. If you select Required Pending Charges Review, the SQL job does not post charges or adjustments automatically.

If effective date types and effective dates are used, they are considered during the billing process.

Required Pending Charges Review

This check box enables you to Process Pending Charges/Adjustments before they are posted to the Student Ledger card. For Payment Period frequency, this option is automatically enabled.

Posting Types

Automated posting of charges and adjustments to the **Ledger Card** is accomplished by an SQL job, Process Automated Registration Billing, that runs every two hours by default. Posting types are based on school-defined preferences.

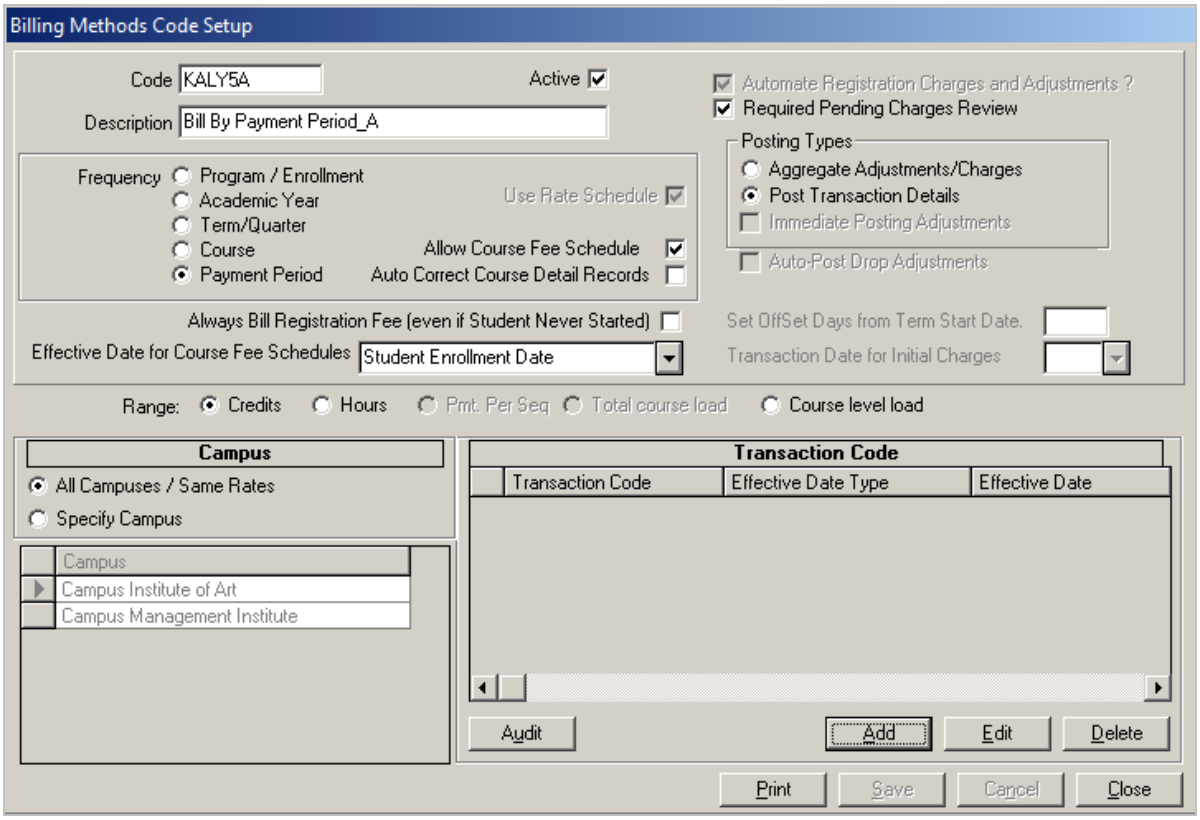
Aggregate Adjustments/Charges

This option enables you to see one record per bill code per payment period in the Student Ledger Card. For Payment Period frequency, this option is automatically enabled. When this feature is enabled, details can be viewed in the View > Student Accounts > Ledger Card > Transaction Detail button > Other Information tab. If the Immediate Posting Adjustments option is not selected, the adjustments are posted at the end of drop/add. If drop/add is not being used, the adjustments are posted at the end of the payment period. The benefit of this type of posting is a "less cluttered" Ledger Card.

Post Transaction Details

When a course is registered, if the billing method is configured with a frequency of Payment Period and Post Transaction Details is selected, a pending charge is created for every transaction code configured in the rate schedule. Each ledger entry contains a field for course, section and payment period.

When the frequency of Payment Period is selected, the option for Post Transaction Details is enabled. Selecting this option and a frequency of Payment Period enables payment period billing with course transaction details. This allows users to bill by payment periods but at the same time display separate transactions per each course bill per transaction code. This new billing method is only available for students enrolled in non term programs.



Note: When the frequency of Payment Period is selected, the Payment Per Sequence and Total Course Load are disabled if Post Transaction Details is selected.

When Post Transaction Details is selected for a billing method, the automated billing logic posts changes for a course upon the first instance of attendance being posted for the course. Additionally, when Post Transaction Details and automated billing is in use for a billing method, student accounts administrators can see that the transaction date for each registration billing charge in the payment period is equal to the course section date.

When rebilling a course in the payment period, attendance has to be posted for the charges pending in the payment period.

Set Offset Days from Term Start Date

Enter the number of days before or after the start of the payment period that the institution wishes to perform initial registration billing. For example, type **-2** to indicate two days before the start of the term, and **2** to indicate two days after the start of the payment period. Enter **0**, the default value, in this field to perform initial registration billing on the payment period start date. If this field is left blank, initial registration billing occurs on the add/drop date defined at the payment period level. If there is no add/drop date defined at the payment period level, registration billing occurs at the end of the payment period.

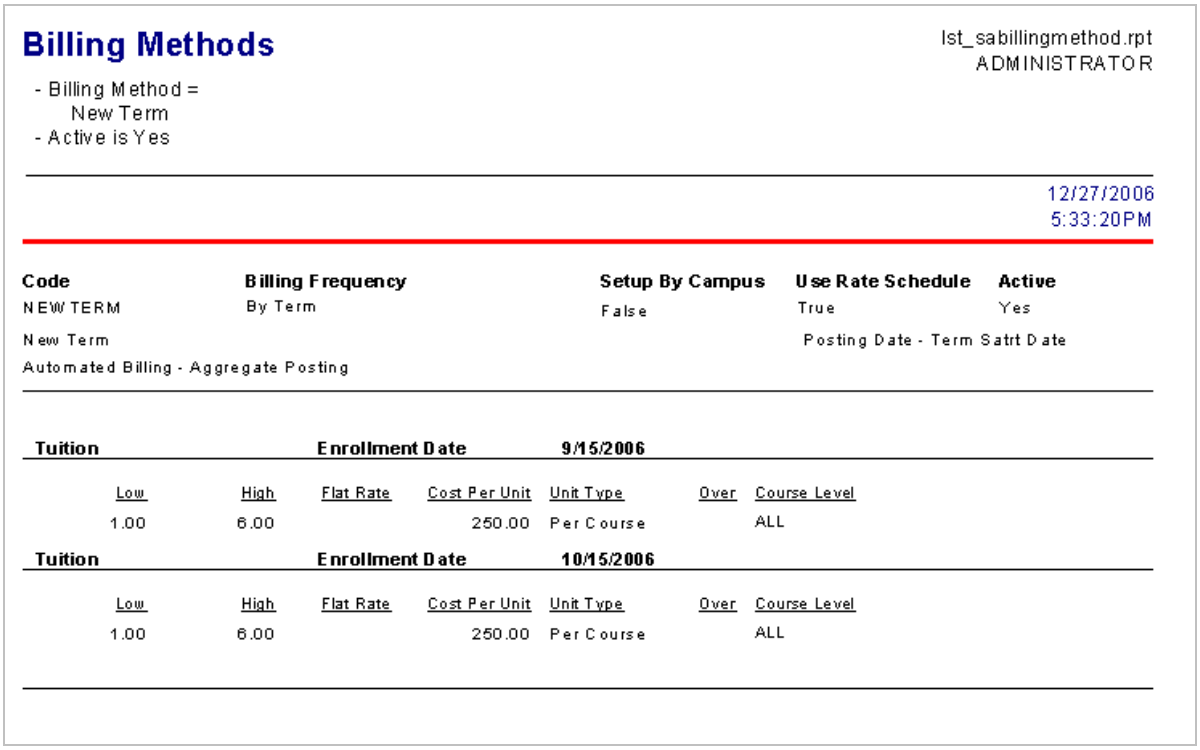
Transaction Date for Initial Charges

This field determines the date posted for registration billing on the student's ledger. The options are:

- **S** - Use System Date
- **T** - Use Term Start Date

Billing Method Report

Click **Print** on the Setup - Student Accounts Lists [Billing Methods] tab, to view a Billing Methods report. This example uses the Term/Quarter frequency with a rate schedule that is using the Effective Date Type of Enrollment Date.



Billing Methods

lst_sabillingmethod.rpt
ADMINISTRATOR

- Billing Method =
  New Term
- Active is Yes

12/27/2006
5:33:20PM

Code	Billing Frequency	Setup By Campus	Use Rate Schedule	Active
NEW TERM	By Term	False	True	Yes
New Term			Posting Date - Term Satrt Date	
Automated Billing - Aggregate Posting				

Tuition **Enrollment Date** **9/15/2006**

Low	High	Flat Rate	Cost Per Unit	Unit Type	Over	Course Level
1.00	6.00		250.00	Per Course		ALL

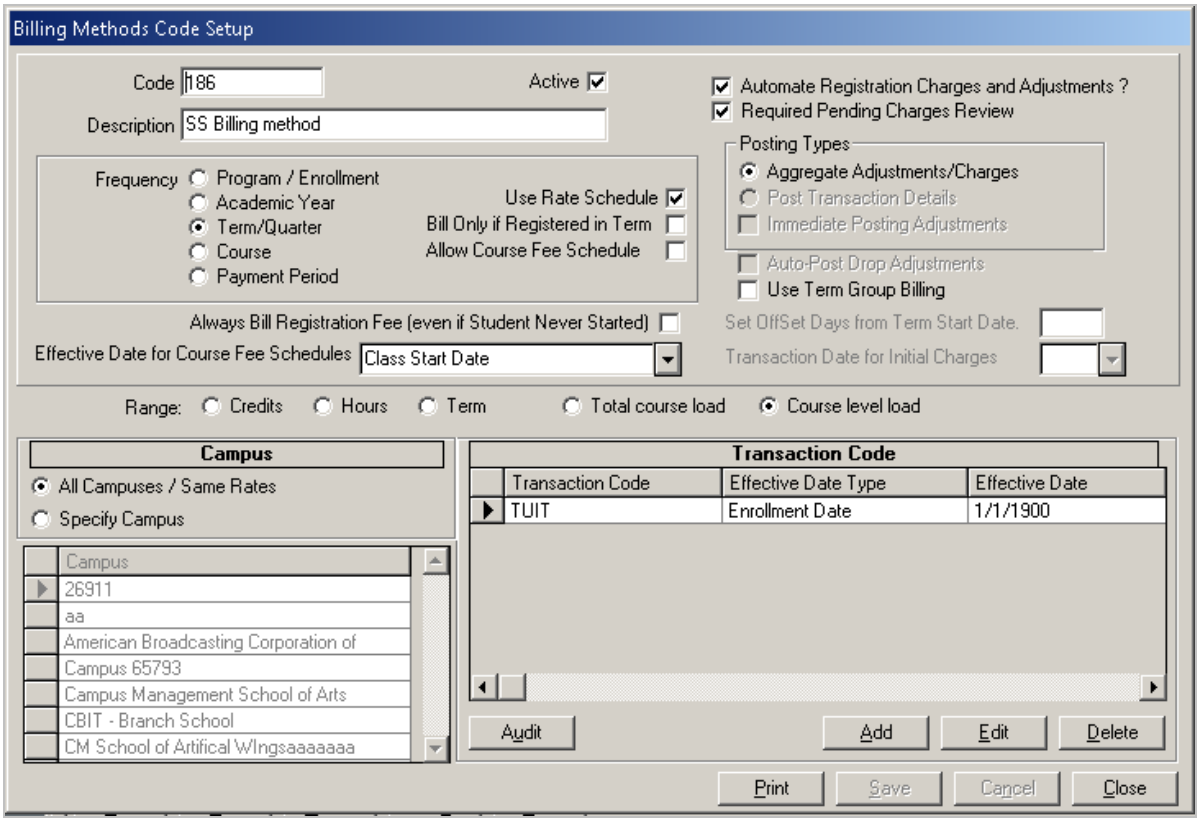
Tuition **Enrollment Date** **10/15/2006**

Low	High	Flat Rate	Cost Per Unit	Unit Type	Over	Course Level
1.00	6.00		250.00	Per Course		ALL

Dual Enrollment Automated Rate Schedule Billing Setup

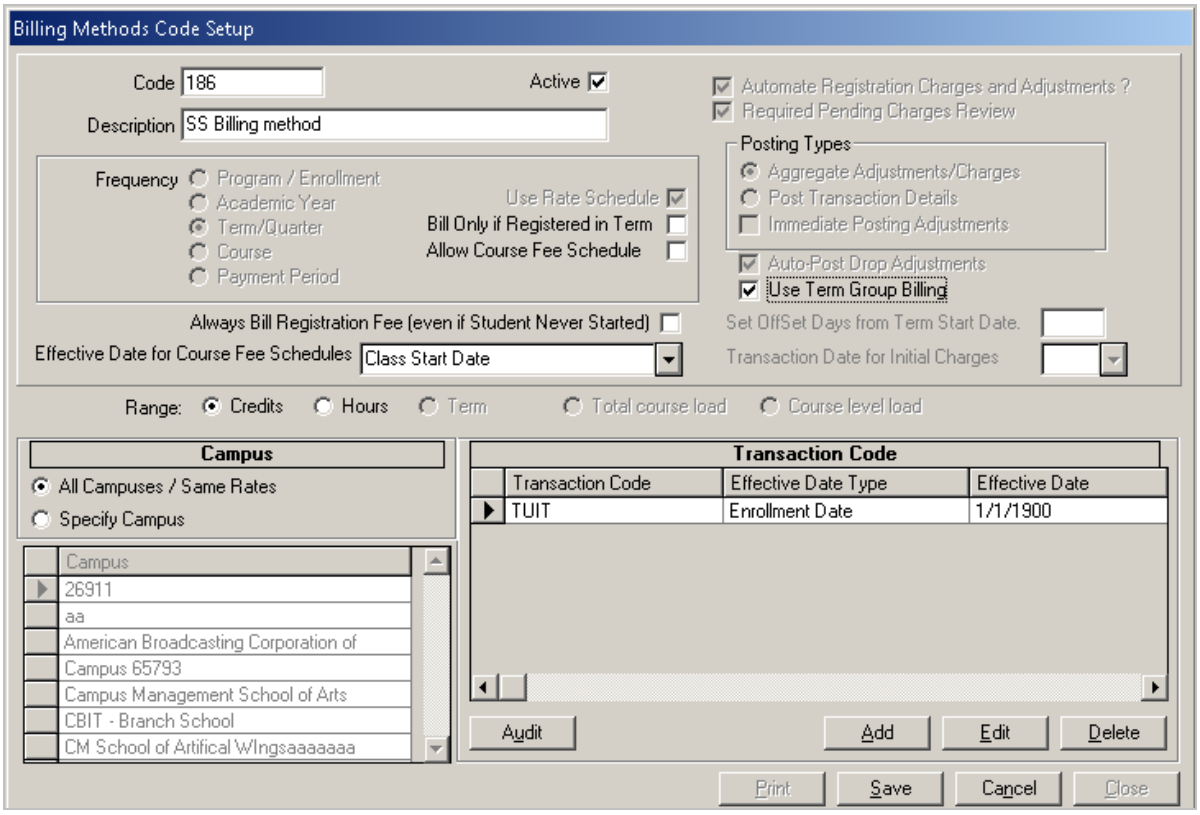
For Student Accounts Billing Method, a new range called 'Use Term Group Billing' is available for this feature to work only if the following five options are selected:

1. Frequency - Term/Quarter
2. Use Rate Schedule
3. Automate Registration Charges and Adjustments
4. Required Pending Charges Review
5. Posting Types - Aggregate Adjustments/Charges



Once 'Use Term Group Billing' is selected, the 'Auto-Post Drop Adjustments' option will be automatically selected. Furthermore, the following six selection boxes cannot deselect until 'Term Group' is deselected.

1. Frequency - Term/Quarter
2. Use Rate Schedule
3. Automate Registration Charges and Adjustments
4. Required Pending Charges Review
5. Posting Types - Aggregate Adjustments/Charges
6. Auto-Post Drop Adjustments



Select the 'Use Term Group Billing' option to ensure when billing student fees, that credits are aggregated across all terms in a group, across connected enrollments and charged against the default billing term at the default connected enrollment.

Only when the Billing Method Code is the same for both connected enrollments and the 'Use Term Group Billing' option is selected, will the credits get aggregated across enrollments for tuition charges.

If the Billing Method Code is not the same for both connected enrollments and the new 'Use Term Group Billing' option is selected, the credits aggregate for the term group within the enrollment but not across the enrollments.

Setup - Student Account Lists [Cash Drawers]

The cashiering function keeps track of money taken in and paid out by various departments or campuses in an institution. This feature functions much the way that cash drawers do in retail businesses. Cash drawers ensure that payments get posted to a student's Ledger Card properly, even if the student made a payment at a campus other than the one in which the student is enrolled. Examples are the Admissions Office, Book Store, Activities Office, etc. For example, a student at South Campus of State University might make a payment at North Campus. The payment will be deposited in North Campus' dedicated account, but the payment will be reflected in the student's ledger card as if the payment were made from South Campus.

Cash drawers require the following:

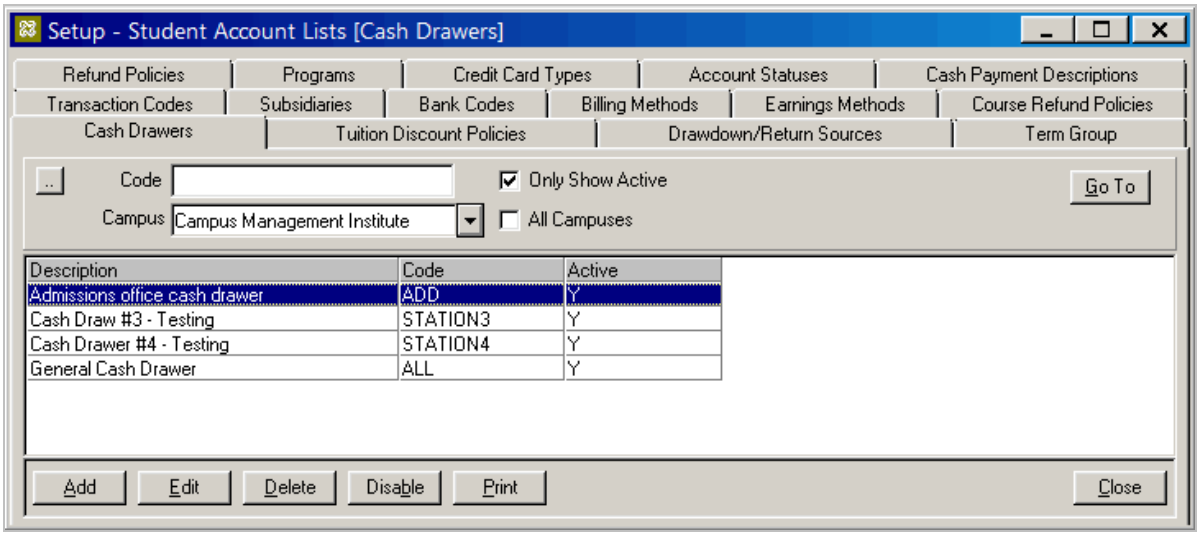
- The cashiering function must be enabled (Setup > Campus Information > Allow).
- Staff members must be designated as cashiers. A cashier is a staff member who receives payments of any kind from students. Each cashier is responsible for his/her own cash drawer. At the end of each business day, each cashier reconciles his/her cash drawer(s) outside the system. That is, the cashier adds up the total dollars, checks, and receipts received and reconciles with the system transaction records. The bursar or other designated administrative staff then consolidates the total receipts from each drawer into the daily deposit for the institution.
- The institution must have set up dedicated bank accounts for this purpose.

For security purposes, institutions can set limits on the amount of money, including checks, EFT vouchers, credit card receipts etc., that a cashier may have in his/her drawer during a session. As the user approaches this amount, the system displays a warning message. When a user accepts a payment that puts the dollar amount at or over the school-defined limit, the system will no longer accept payments. The cashier must then open another drawer. Money, checks and receipts in the "drawer" must then be deposited in the appropriate office. This is a school-defined procedure.

All cash drawers are managed by the authorized user who consolidates all funds from all cashiers into one bank deposit.

To add or edit a list of cash drawers codes:

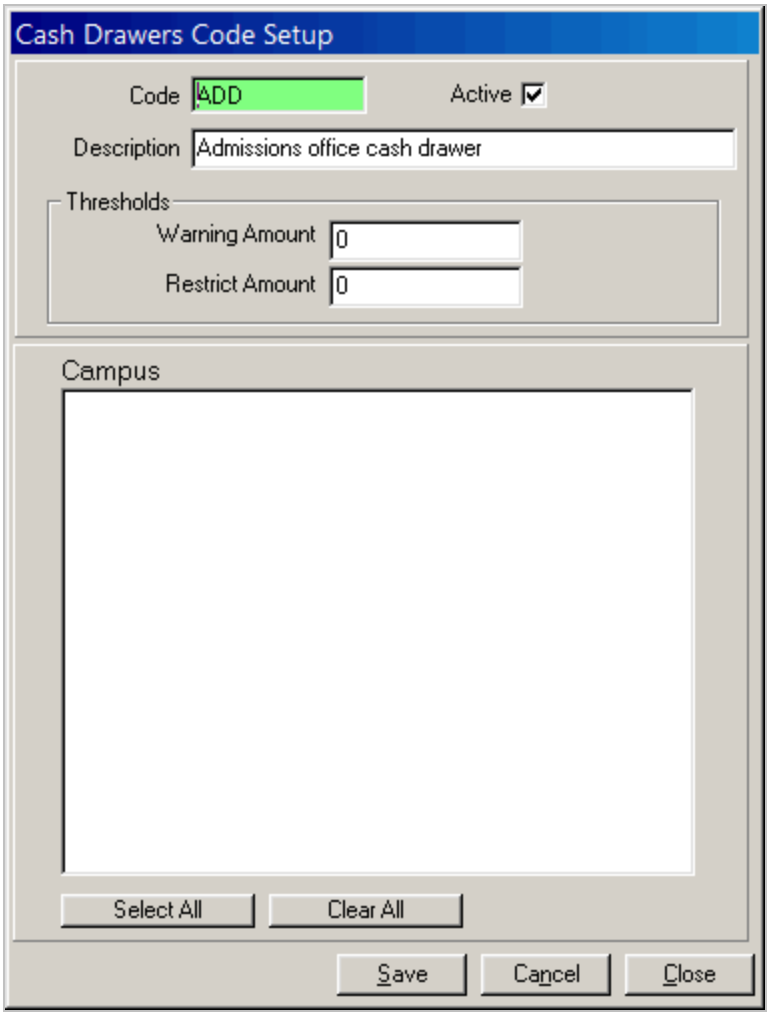
1. Navigate to **Lists** > **Student Accounts**. The Setup - Student Accounts Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Cash Drawers**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in

the text box and press **Enter** to view the corresponding record in the list.

4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
6. Click **Add**, or select a record and click **Edit**. The Cash Drawers Code Setup form is displayed.



7. Specify a unique **Code**. It should be intuitive and easily recognizable.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Enter a **Description**.
10. Under Thresholds enter dollar amounts for threshold values associated with this cash drawer.
    - The **Warning Amount** is an amount that triggers a message indicating that the cashier is approaching the allowable limit for total transactions in this cash drawer for each session.
    - The **Restrict Amount** is the allowable limit for transactions in this cash drawer for each session. The

system will not process further transactions when the amount in the cash drawer is equal to or exceeds this amount.

Note: When the cash draw reaches its school-defined limit, the user must open a new drawer or remit the contents of the "full" drawer to the appropriate office. This is a school-defined operating procedure.

11. Select a campus or campuses associated with this drawer. Add or remove campuses individually or use the **Select All** and **Clear All** buttons.
12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

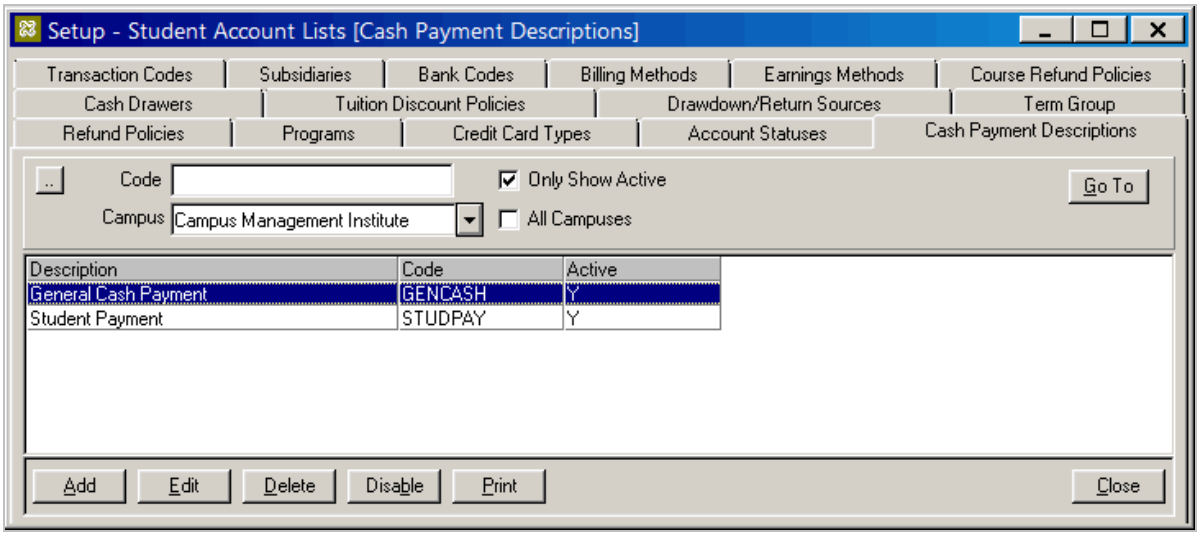
Setup - Student Account Lists [Cash Payment Description]

This form contains a table with all cash payment descriptions configured for the selected campus. All payment descriptions consist of the following:

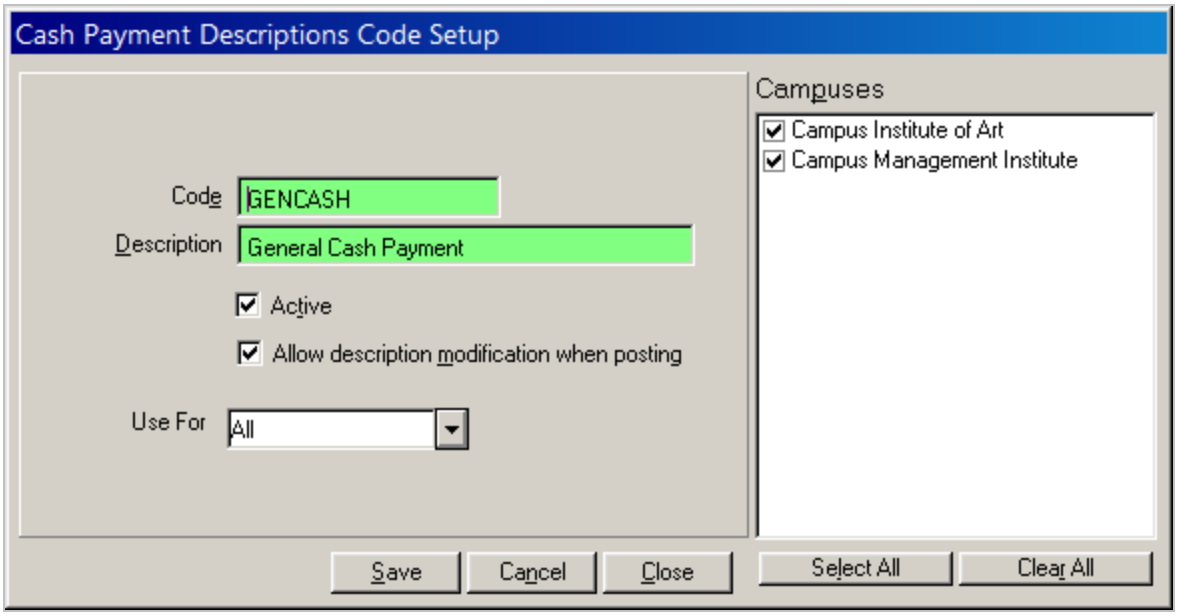
- Description – a text field for displaying all payment descriptions.
- Active – a user-selectable Yes/No option to indicate if the eligible description is active or inactive.
- Editable – a user-selectable Yes/No option to signify if the description can be modified by the user.
- Use – a user-selectable option to indicate whether the description is to be used for Student Ledger, Subsidiary Ledger, or both.

To add or edit a list of cash payment descriptions codes:

1. Navigate to **Lists** > **Student Accounts**. The Setup - Student Accounts Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Cash Payment Descriptions**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
6. Click **Add**, or select a record and click **Edit**. The Cash Payment Descriptions Code Setup form is displayed.



7. Specify a unique **Code**.
8. Enter a **Description**.
9. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
10. Select **Allow description modification when posting** if the description can be edited after being selected during a cash payment process.
11. In the **Use For** field, select a ledger. This option filters the descriptions when posting a payment on the main ledger and on a subsidiary ledger.
12. Select one or more **Campuses**.
13. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

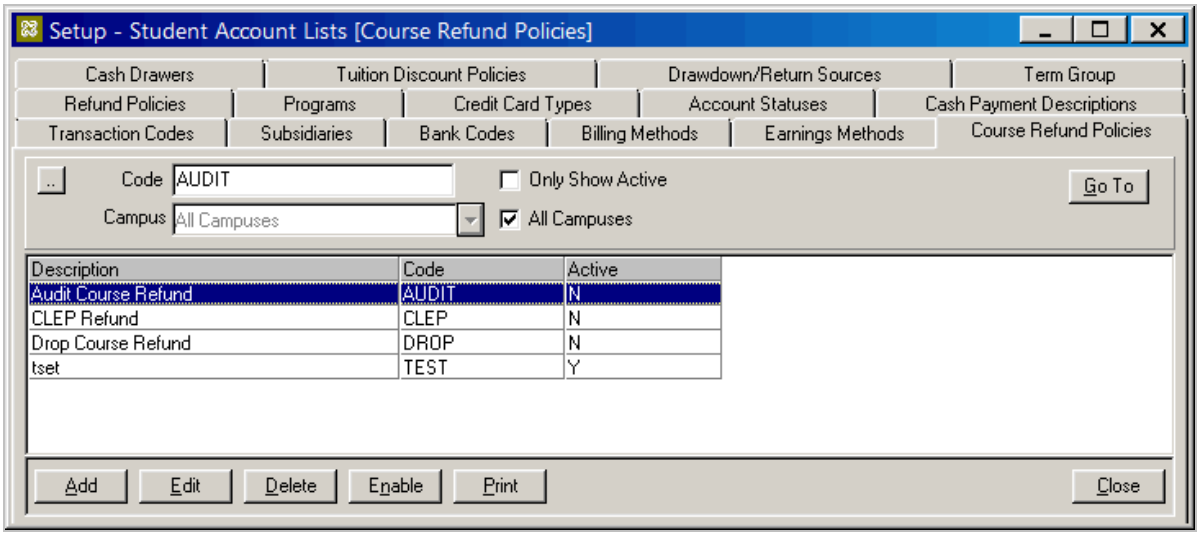
Setup - Student Account Lists [Course Refund Policies]

The U.S. Department of Education, your state's department of education, and your institution's administration may have different policies and procedures for refunding money to students when they leave school before completing their programs. Typically, the refund policy that is most advantageous to the student must be the one selected at the time the calculation is made. Refund calculations are triggered for a given student.

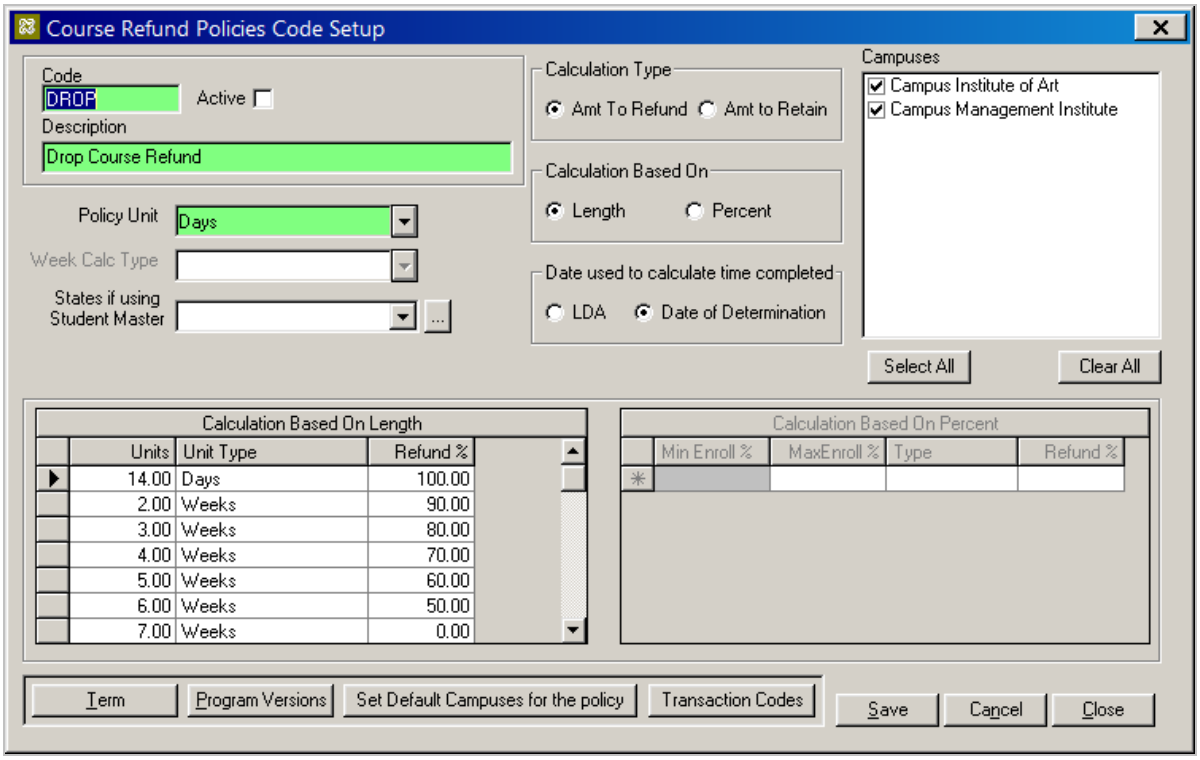
The refund calculation in CampusNexus Student supports straight pro rata refund policies. That is, calculations are based on the number of days or weeks completed by the student for the enrolled course. You may need to set up several refund policies from which to select in different circumstances.

To add or edit a list of course refund policies codes:

1. Navigate to **Lists** > **Student Accounts**. The Setup - Student Accounts Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Course Refund Policies**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
6. Click **Add**, or select a record and click **Edit**. The Course Refund Policies Code Setup form is displayed.



7. Specify appropriate options. See Field Descriptions.

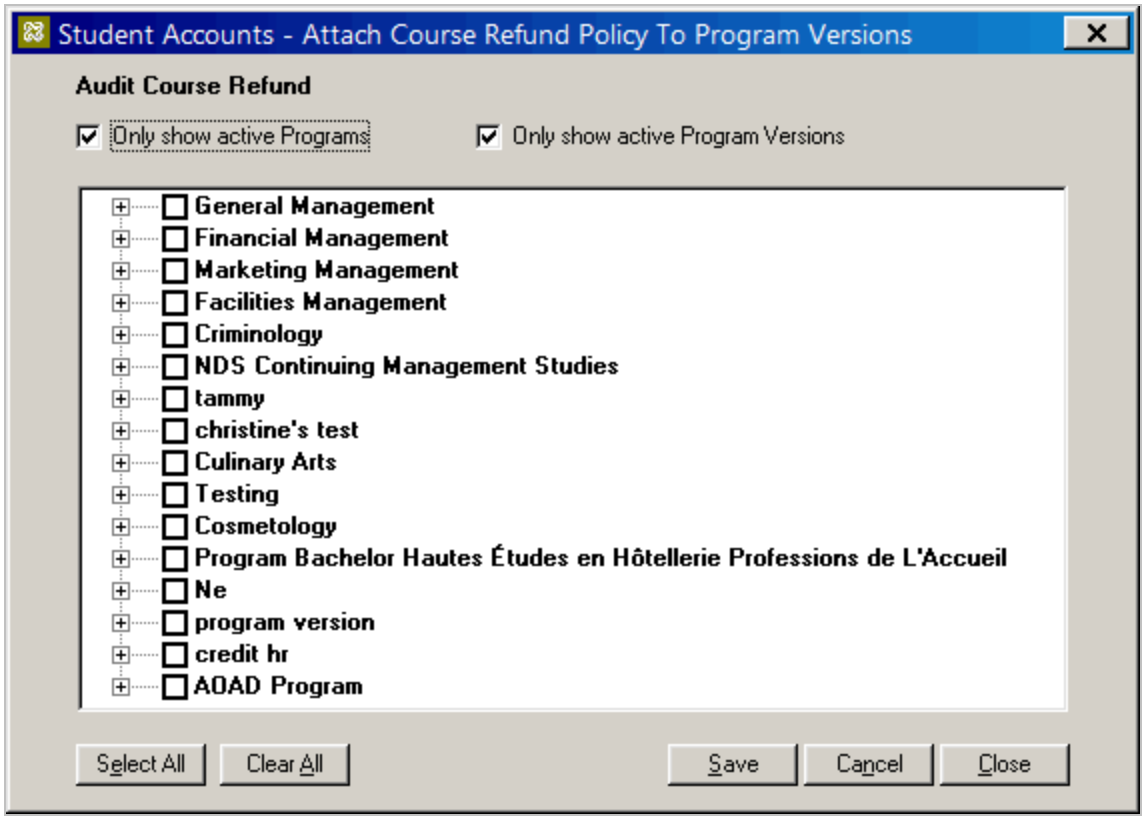
   Note: The refund calculations are first based on the Calculation Based on Length grid, then on the Calculation Based on Percent grid. You can use either or both of these grids to define your refund policy.

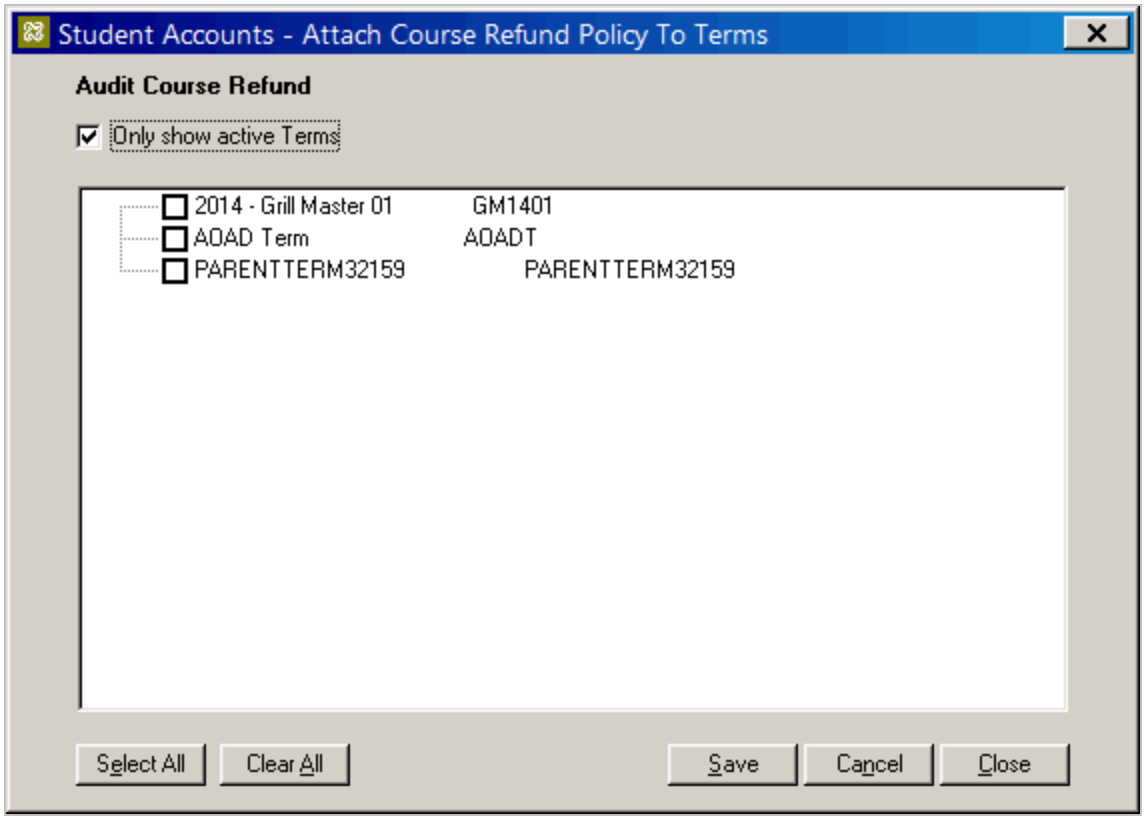
8. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

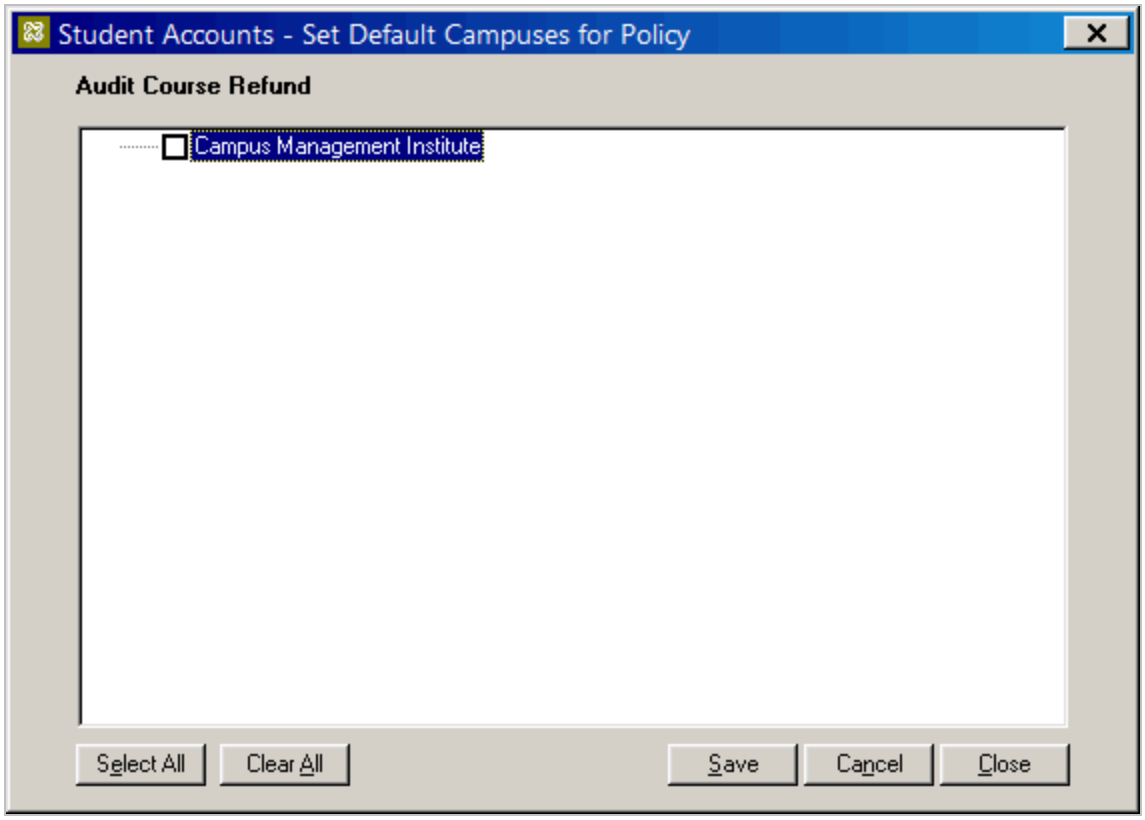
Field Descriptions

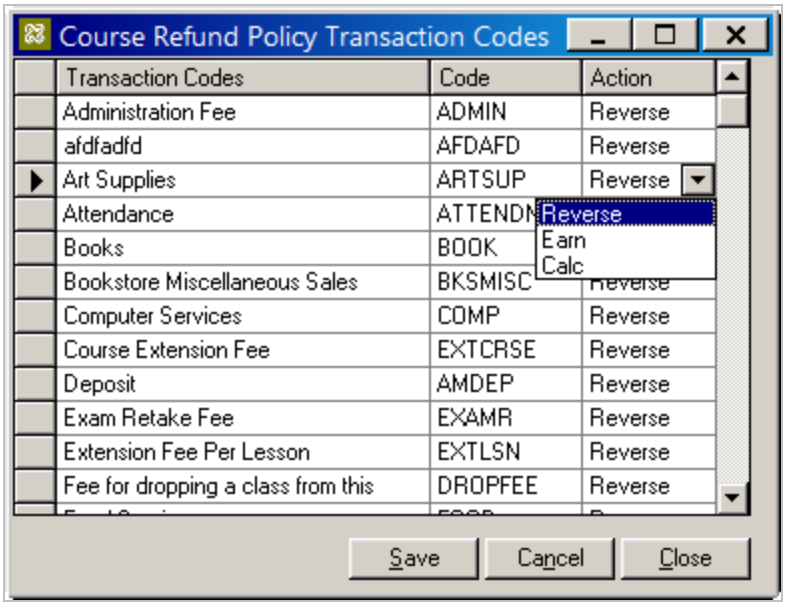
Field	Description
Code	Enter a code for this refund policy.
Active	Select or clear the Active flag as required. Clear the flag if this is no longer an active refund policy.
Description	Enter a description for this refund policy.
Campuses	Select the campuses to which this policy applies. Multiple campuses can be related to the same refund policy. At least one campus must be selected before a new refund policy record can be saved.
Policy Units	This field determines how the refund relates to time spent. The values are Weekly (default) and Daily.
Weeks Calc Type	This field is enabled only if the Policy Units is Weeks. Use the drop-down list to select how your institution defines a week. Options are Calendar Days or Scheduled Instruction Days. • Scheduled Instruction Days calculates the number of weeks based on at least one class session per calendar week (Sun-Sat). • Calendar (default) totals the number of days in the time period calculation minus holidays -if that option has been enabled- divided by seven.

Field	Description
States if using Student Master	This field allows your institution to specify the states to which the course refund policy applies. If the course refund policy (see Delivery Methods) is to be based on the student's state of legal residence, the state stored with the address in the student master record is compared against the states selected for each configured refund policy. The course refund policy used will be the one where one of the states selected for the policy matches the state stored with the address in the student master record. **Note**: Any course refund policy that does not have states selected as a filter continue to be used with existing logic, i.e., it is selected as the default for campus, term, or program version. Validation is in place that does not allow a state to be associated with more than one course refund policy for the same campus.
Calculation Type	Select Amt to Refund or Amt to Retain.
Calculation Based On	Select Length or Percentage.
Calculation Based On Length	This grid is considered first. • Units Attendance - Enter the number of attendance units for this row. • Unit Type - The Attendance Units column is used to determine what unit the Length condition applies to. Valid values are Weeks, Days, During Add/Drop • Refund (Retain) Percentage - Enter the percentage to refund or retain for this row. • Max Earn - Enter the maximum amount that can be earned at this level of policy units completed.
Calculation Based on Percent	This grid is considered second. • Minimum Enroll Percentage - Enter the minimum percentage of the enrollment completed by the student. • Maximum Enroll Percentage - Enter the maximum percentage of the enrollment completed by the student. • Type (Refund Percent Flag) - Valid values are Pro Rata or Percentage. The Type (Refund Percent Flag) column determines if the percentage to refund/retain comes from the Refund Percent field or if the percentage to refund or retain is the actual percentage completed by the student. For straight pro rata policies, the percentage of tuition earned by the institution correlates exactly to the percentage of the program the student completed. For example, if the student completed 47 % of the program before dropping, the institution would retain 47 % of the tuition. • Refund (Retain) Percentage - Enter the percentage of funds received to be refunded or retained.
Date used to calculated time completed	Use these buttons to specify which date to use when evaluating time completed for a given course. Select LDA (Last Date of Attendance) or Date of Determination. The LDA option is the last date of positive attendance.

Field	Description
Program Versions	This button is enabled after you save a new course refund policy and when you edit an existing policy. When you click this button, the Attach Course Refund Policy To Program Versions form is displayed.  Select or clear the check boxes to associate or disassociate the course refund policy with the program versions.

Field	Description
Term	This button is enabled after you save a new course refund policy and when you edit an existing policy. When you click this button, the Attach Course Refund Policy To Terms form is displayed.  Select or clear the check boxes to associate or disassociate the course refund policy with the terms.

Field	Description
Set Default Campuses for the policy	This button is enabled after you save a new course refund policy and when you edit an existing policy. When you click this button, the Set Default Campuses for Policy form is displayed.  Select or clear the check boxes to associate or disassociate the course refund policy with the campus.

Field	Description
Transaction Codes button	This button is enabled after you save a new course refund policy and when you edit an existing policy. When you click this button, the Course Refund Policy Transaction Codes form is displayed.  In the displayed grid of active billing codes, each code can be configured individually by clicking in the Action column to open a combo box with the following options for course refund adjustment: • Reverse (default): Reverse the charge on the student's ledger card (net to zero) before the refund is calculated. The full amount of the original charge is refunded. • Earn: The charge is 100% earned when charged (0% refund). The institution retains the original charge amount for the specified billing code. • Calc: Include the charge in refund calculations. A percentage of charges earned for the dropped course is determined based on the course refund policy associated with this transaction code.

Setup - Student Account Lists [Credit Card Types]

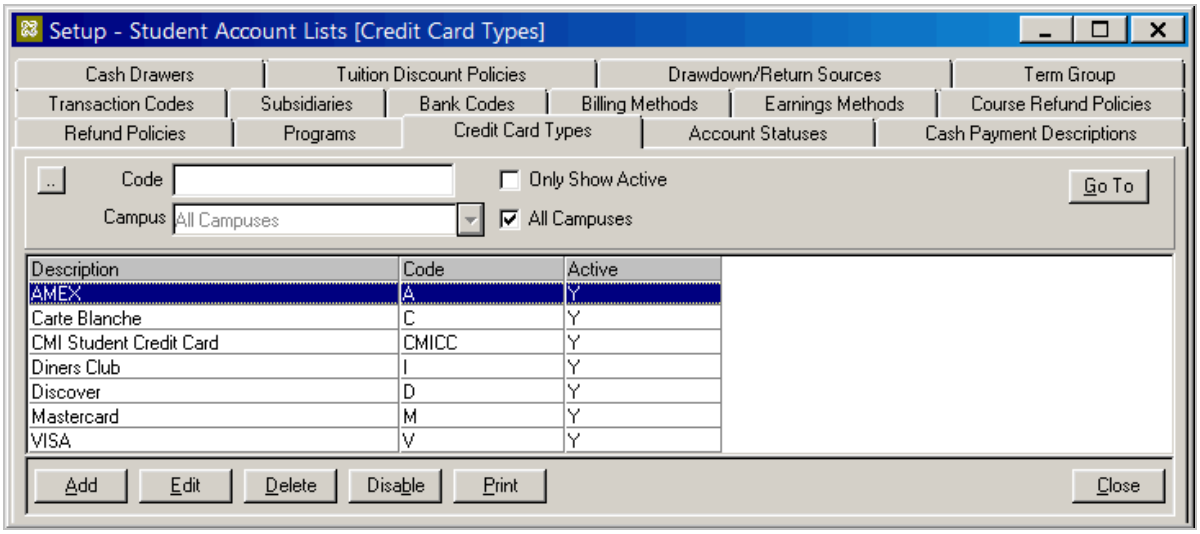
Set up the credit card types accepted by your institution. On reports of Admissions Deposits, Cash Receipts Detail, and Credit Card Transactions, the descriptions for credit cards are taken from the Credit Card Types list. See also Add/Edit Credit Card Information and Payment Information.

When you accept a credit card for a deposit or agency/student payment, CampusNexus Student validates the credit card number only if the credit card type is one of the following:

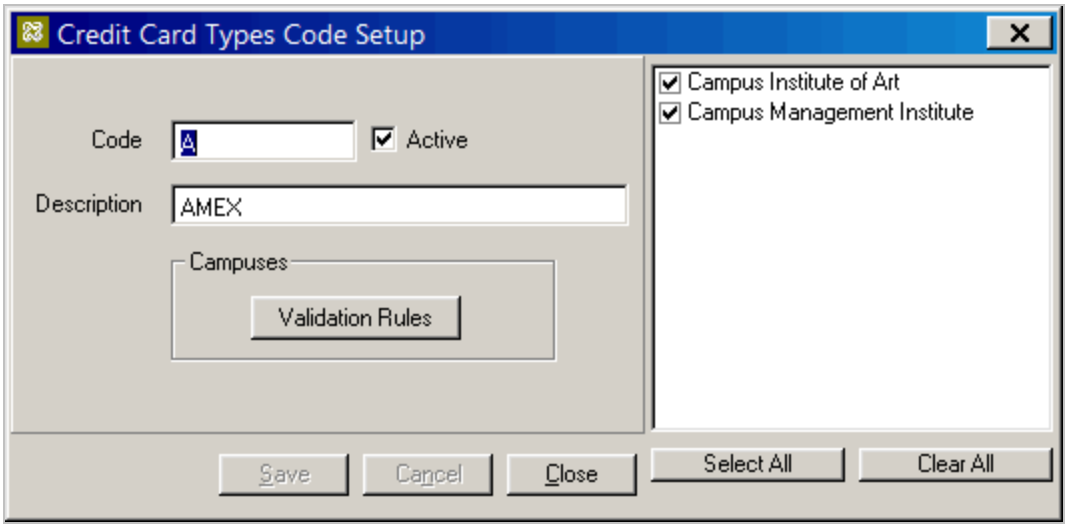
- A - American Express
- C - Carte Blanche
- D - Discover
- I - Diners Club
- M - MasterCard
- V - Visa

To add or edit a list of credit card types codes:

1. Navigate to **Lists** > **Student Accounts**. The Setup - Student Accounts Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Credit Card Types**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
6. Click **Add**, or select a record and click **Edit**. The Credit Card Types Code Setup form is displayed.



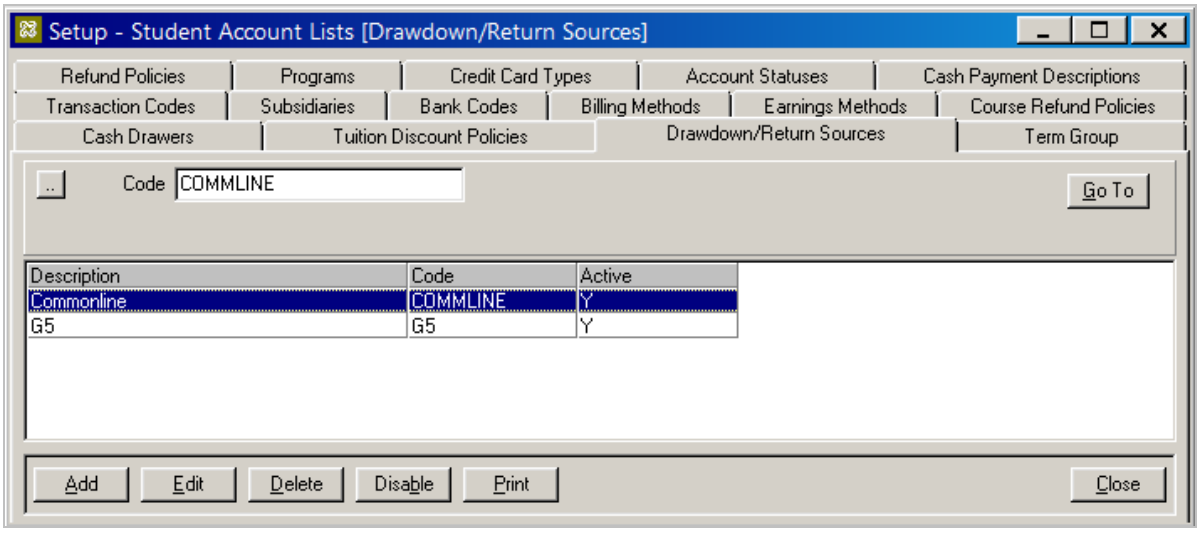
7. Specify a unique **Code**.
8. Enter a **Description**.
9. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
10. Select one or more **Campuses**.
11. Click **Validation Rules**. CampusNexus Student displays a list of campuses associated with your institution. Select the campuses that require validation of credit cards with payments. When you select a campus, that campus enforces validation rules with each credit card payment.
12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Student Account Lists [Drawdown/Return Sources]

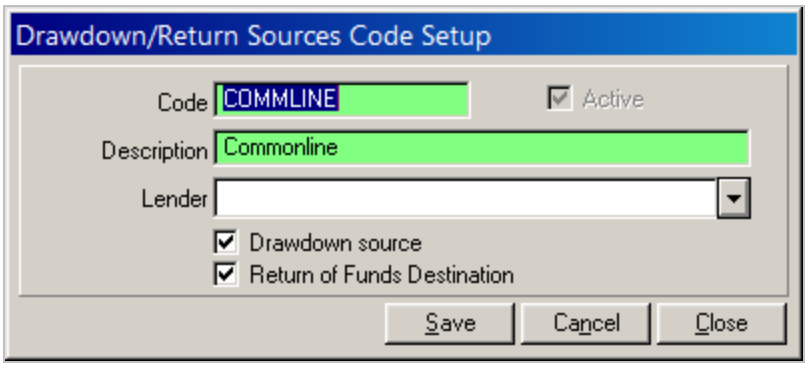
You can set up drawdown/return sources for student accounts.

To add or edit a list of drawdown/return sources codes:

1. Navigate to **Lists** > **Student Accounts**. The Setup - Student Accounts Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Drawdown/Return Sources**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
6. Click **Add**, or select a record and click **Edit**. The Drawdown/Return Sources Code Setup form is displayed.



7. Specify a unique **Code**.
8. Enter a **Description**..
9. Select or clear the **Active** check box to designate the record as active or inactive, respectively.

10. Select the **Lender**.
11. Select the **Drawdown Source** check box if the code applies to drawdowns.
12. Select the **Return of Funds Destination**check box if the code applies to the return of funds.
13. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Student Account Lists [Earnings Methods]

This procedure establishes the methods by which your institution records its tuition and other deferred earnings. Transaction codes can be set up to be deferred earnings transactions.

Several options are available for earnings calculations. You probably need only one or two of these options, depending on the nature of your institution. Perhaps, you need one method for traditional in-the-class-room programs and one method for distance education programs. While we illustrate only a few of the options here, you can design other variations from the components available in this procedure.

Note: Institutions that are publicly-held corporations or that are required by another state or accrediting entity must report up-front fees (like registration fees) over the life of the program. Proprietary institutions do not need to earn reg fees over the life of the program. Refer to the Staff Accounting Bulletin No. 101 (SAB101) document from the Securities and Exchange Commission (https://www.sec.gov/interps/account/sab101.htm) for more information on revenue recognition.

If your Revenue Basis (Earning Unit) is months, the following information applies. The revenue basis is set up under Billing Methods.

- If you Bill By Term, the Total Earning Units are Months in the Term
- If you Bill by Program, the Total Earning Units are Months in the Program
- If you Bill by Credit Hours, the Total Earning Units are Months in the Program
- If you Bill by Academic Year, the Total Earning Units are Months in the Academic Year.

You will select one of these earnings methods when you set up Program version financial parameters.

Revenue Recognition Options

Revenue Recognition allows for setting parameters on how to earn on the First and Last months of the Earnings period. This only applies to earnings methods that use Months as the Earning Unit. These parameters determine if a student earns a Full Month, Half Month, or Nothing at all in the First and Last months of the Earnings period.

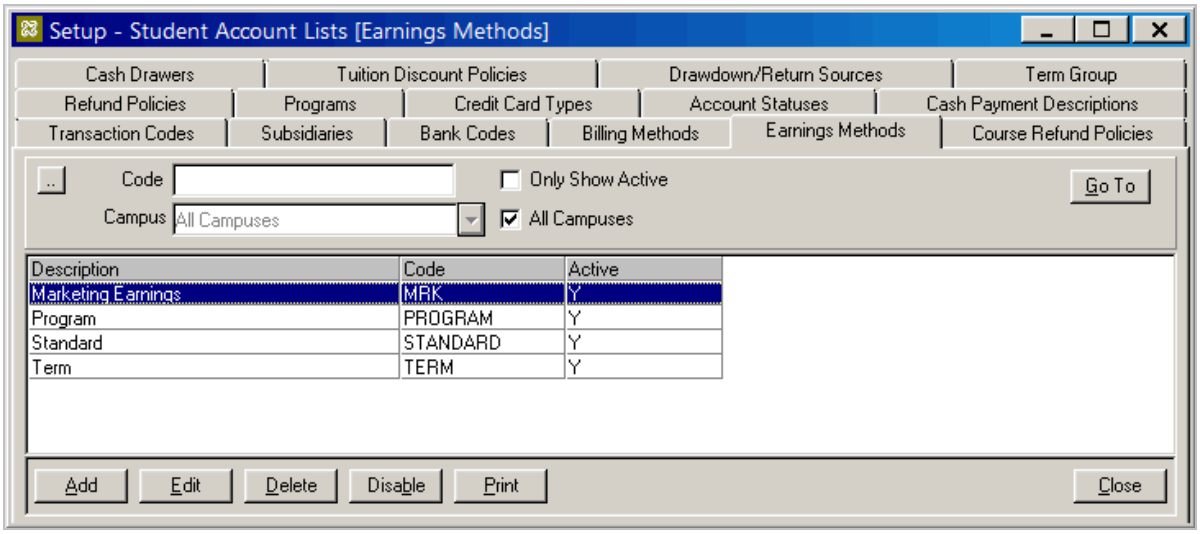
The Revenue Recognition/Earnings Method setup and calculation allows for earning ½ month of revenue on the First and/or Last month of Enrollment. You can configure the Earnings Policy to earn ½ month in the first and last months using two separate and unrelated days.

Example:

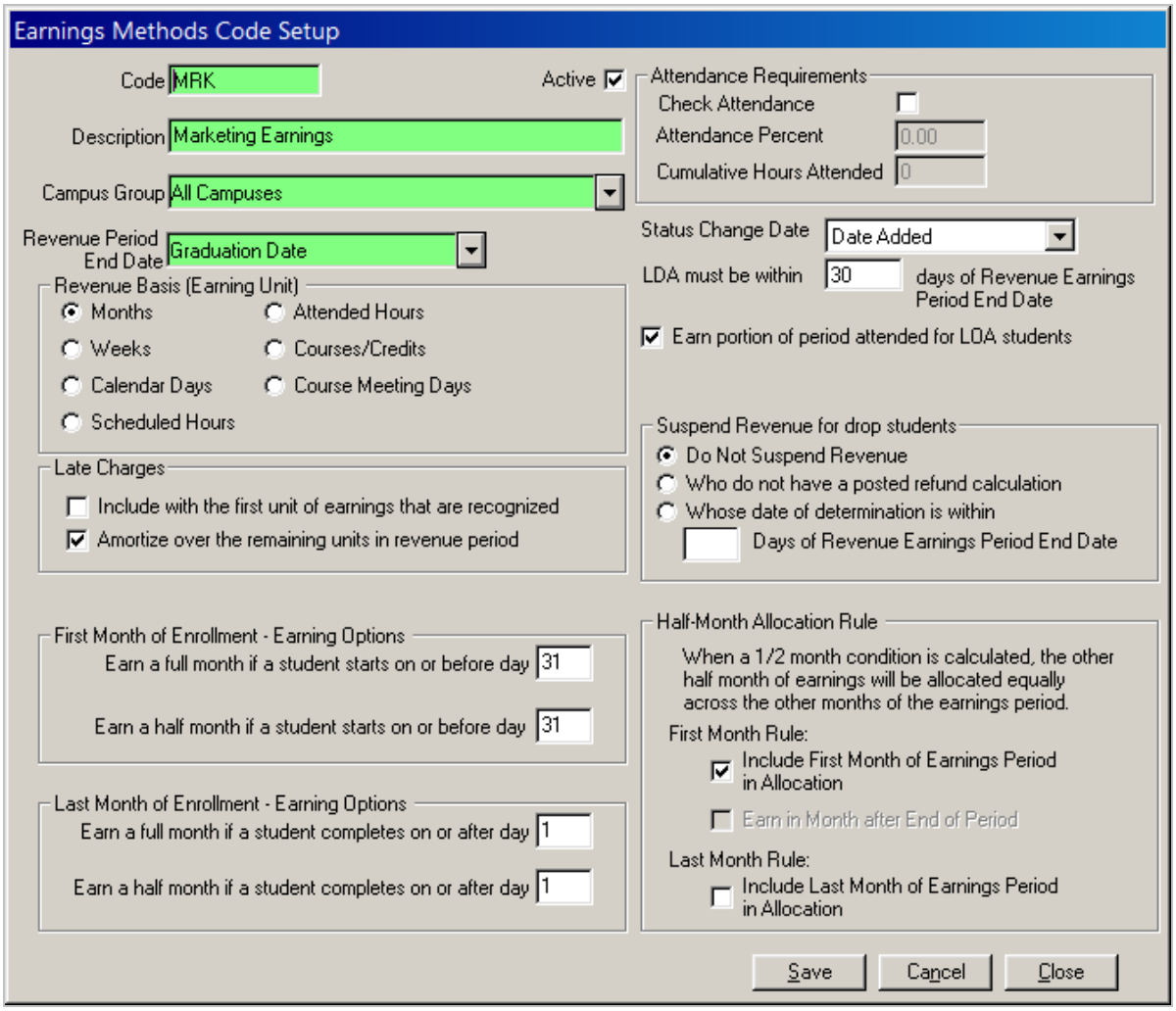
An institution may want to earn a full month on the first month of enrollment regardless of the day of the month that the student starts, and earn a full month on the last month of enrollment only if the student ends after the 15th of the month. Configure the first month as "On or before the 31st of the month, and the last month as on or after the 15th of the month). See also Reverse Revenue Recognition.

To add or edit a list of earnings methods codes:

1. Navigate to **Lists** > **Student Accounts**. The Setup - Student Accounts Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Earnings Methods**.



3. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
6. Click **Add**, or select a record and click **Edit**. The Earnings Method Code Setup form is displayed.



7. Specify a unique **Code**.
8. Enter a **Description**.
9. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
10. Select a **Campus Group** that will use this earning method.
11. Select the date to use as the **end of the revenue period** to correctly calculate earnings for programs that are earned by program:
    - **Graduation Date** (default) - end of the revenue period is the student's graduation date.
    - **Extern Begin Date** - The end of the revenue period is the date when the externship begins. The Extern Begin Date is the revenue period end date only when an enrolled student is in a program version where the billing method is based on program or based on term. If an enrolled student is in a program version that earns by program or by term and the program version uses the earning method defined to use Extern Begin Date, CampusNexus Student uses the Extern Begin Date as the revenue period end date. If the student's program or term meets the above criteria and has a blank or null in the Extern Begin Date field, the student's record will appear as an exception on the Revenue Exception Report.
12. Select an **Attendance Requirements** option if applicable:

- **Check Attendance** - Check this box if student attendance in class is required to earn tuition and other deferred charges. If the check box is selected, enter a value in the Attendance Percent, the Cumulative Hours Attended, or both fields below.
- **Attendance Percent** - Optional. If attendance is required, enter the minimum percentage of attendance required by each student to justify earned tuition for the student. If you do not use a minimum percentage, enter zero.
- **Cumulative Hours Attended** - Optional. Enter the minimum number of cumulative hours per month required to justify a month of earned tuition. Enter zero if no minimum number of hours is required.

13. Select Date Added or Effective Date in the **Status Change Date** field.
14. The **LDA must be with (X) days of Revenue Earnings Period End Date** field controls the length of time from the student's Last Date of Attendance (LDA) to the time that earnings are frozen for the student and the student is placed on the exception report. In the example, if a student's Last Day of Attendance is longer than 45 days prior to the run date of the revenue program, the student will be noted as an exception. This will help forecast revenue. This rule will only be relevant on students in an active or probation status.
    - You can specify the number of days to check the LDA. Zero (0) indicates that the LDA is not to be checked. NULL also indicates that the LDA is not to be checked. One (1) indicates that the LDA must be greater than or equal to the As Of date of the revenue calculation. That is to say, the number of days is inclusive of the Day that the revenue is run. If revenue is run on April 30, 2002, and this setting is set to 7 days, then the student would have to have an LDA of April 24, 2002 or after.
    - Verbiage on the message says "*LDA not within xx days of revenue start date*" where xx represents the # of days set up in Lists.
15. Select **Earn portion of period attended for LOA student** to indicate that revenue will be earned for students who attended a portion of the revenue period but have a school status of LOA as of the end of the revenue period.
16. Select a Revenue Basis (Earning Unit) option. Select a Late Charges (Revenue Recognition) option if offered.
17. Select a Suspend Revenue for drop students option.
18. Select a Half-Month Allocation Rule option if offered.
19. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.
20. Click **Print** on the Setup - Student Account Lists (Earning Methods] tab to get a list of your earnings methods.

Revenue Basis (Earning Unit)

Note: When a program version is set to earn by academic year, you can configure the number of units to earn throughout each academic year. CampusNexus Student performs the revenue recognition process ignoring the usual calculation of units and using the override to earn as configured. This only works if you select the Revenue Basis as Earn by Months, Weeks or Calendar.

- Select **Months** if you earn tuition on a monthly basis.
- Select **Weeks** if you earn tuition based on weeks attended.
- Select **Calendar Days** if you earn tuition based on calendar days.
    - Select the **Adjust Earned/Total Units for Holidays** option, if you would like holidays to be removed from earned or total days. The following options are available when selecting this option.

- Select **Earn on Child Terms** to bill by Parent Term, but earn by Child Term. Your institution must be setup to use Term Relationships before you can use this feature. Refer also to Revenue Recognition.

- Select **Scheduled Hours** if you earn tuition based on scheduled hours. For more information, see Billing Methods. Also see Suspend Revenue for drop students for information on the available selections under this section when Scheduled Hours is selected.
- Select **Attended Hours** if you earn tuition based on attended hours.
- Select **Courses/Credits** if you earn tuition based on courses or credits. When a student starts a course, the tuition for the course/credits is 100 percent earned. For instance, if a student starts courses sequentially (one after the other) tuition for each course is earned as each course is started. If a student starts three courses at the same time, tuition for all three courses will be earned at the same time.
- **Course Meeting Days** - Specifies that there will be one unit earned for each day the class meets. Therefore, the total units for the earning period is the total number of times the class meets. When specifying the revenue period (Lists > Student Accounts > Programs > Program Version), there are several requirements.

  a. The billing method must be by course set to automated and you must select the setting to 'Post Transaction Details'.
  b. The earnings method must be set to use a basis of Course Meeting Days.

  With those settings, the only revenue time frame available will be to earn by transaction code. The **TUIT** code will NOT appear in the list as it is hard coded to earn over the Course Section. You can select other time frames for any of the other transaction codes set to defer. The transaction codes set to defer over other time periods will earn by a basis of days.

  If a transaction code is selected to earn by Course Meeting Days, the entry on the ledger card must be linked to the course section. If it is not, the transaction will not earn and an exception of "X" will be returned on the exception report. The link can be made by selecting 'Adjust Transaction' and selecting the course that the fee is associated with.

Late Charges Revenue Recognition

- **Include with the first unit of earnings that are recognized** - revenue will be included during the first unit of earnings that are recognized
- **Amortize over all units in the revenue period** - revenue will be amortized over all units of earnings in the revenue period. If this option is selected, then the Earn in Month after End of Period option under the First Month Rule section within the Half-Month Allocation Rule section will be disabled.

Suspend Revenue for drop students

Depending on when a student drops out of school, necessary charge adjustments may not yet be posted to the student's ledger card before month end processing. If revenue is calculated prior to adjustments being posted, you can over-recognize revenue for the student. In CampusNexus Student the adjustments are posted when the Refund Calculation is posted. To help manage this process, these configuration settings will be used to earn Revenue for drop students, according to the configuration setting selected.

This option is enabled for all Earning Units, and set to **Do Not Suspend Revenue** unless you select another option here. Each option is mutually exclusive.

- Select **Do Not Suspend Revenue** if you do not want to collect revenue for drop students
- Select **Who do not have a posted refund calculation** to suspend revenue for drop students who do not have a refund calculation posted in their Refund Calculation folder for the appropriate enrollment period.
- Select the third option to suspend revenue for drop students whose **date of determination is within 'n' number of**

days of the Revenue Earnings Period End Date. This data entry field is enabled only when this option is selected. CampusNexus Student expects a numeric value between 0 and 999. A zero (0) value is acceptable, and indicates that the date of determination and the revenue earnings period end date are the same. The 'n' number of days will represent the number of days that you want to suspend revenue, from the last day of the month entered in the Revenue Recognition wizard. For example, to run the wizard for the month of March, and you entered March 31st as the end of the revenue earnings period, this number will represent n number of days before the 31st. If the number entered is 15, CampusNexus Student will subtract 15 days from the 31st, which will be March 16th, therefore the revenue will be suspended from March 17th until March 31st.

Half-Month Allocation Rule

When a 1/2 month condition is calculated, the other half month of earnings will be allocated equally across the other months of the earnings period. These options are only available when 'Months' is selected as the Revenue Basis (Earning Units).

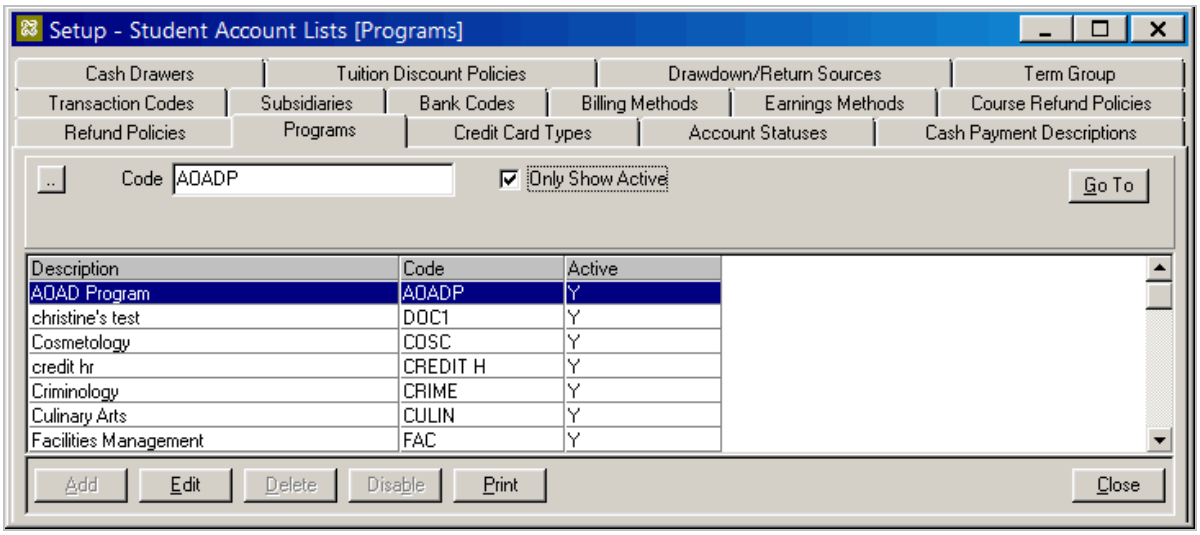
- First Month Rule - select one:
  - Include First Month of Earnings Period in Allocation
  - Earn in Month after End of Period - If this option is selected, the 'Amortize over all units in the revenue period' option under the Late Charges section is disabled.
- Last Month Rule
  - Include Last Month of Earnings Period in Allocation

Setup - Student Account Lists [Programs]

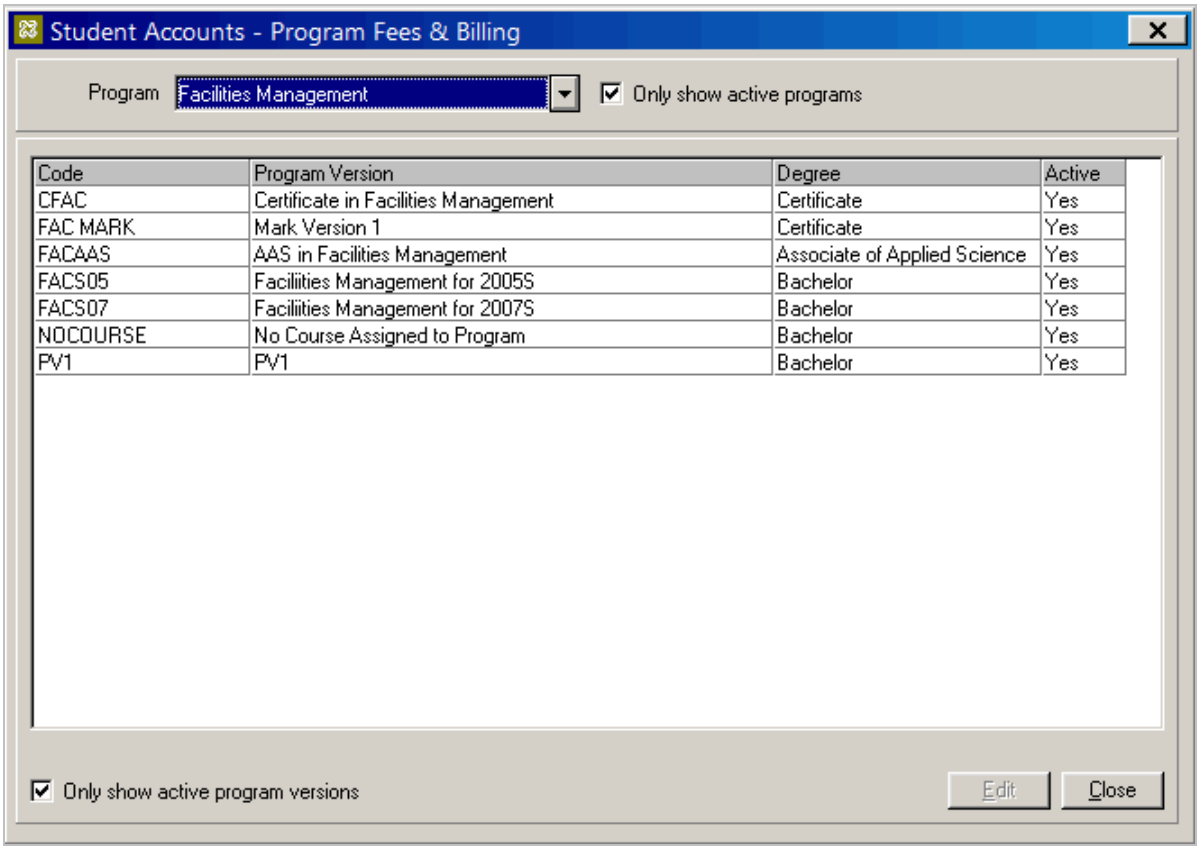
Use the Setup - Student Account Lists [Programs] list to establish tuition and other fees to be billed to the student for each program version. Prior to this setup, review the setup for billing methods and earnings methods, both of which will be used in this procedure.

To add or edit a list of program fees and billing codes:

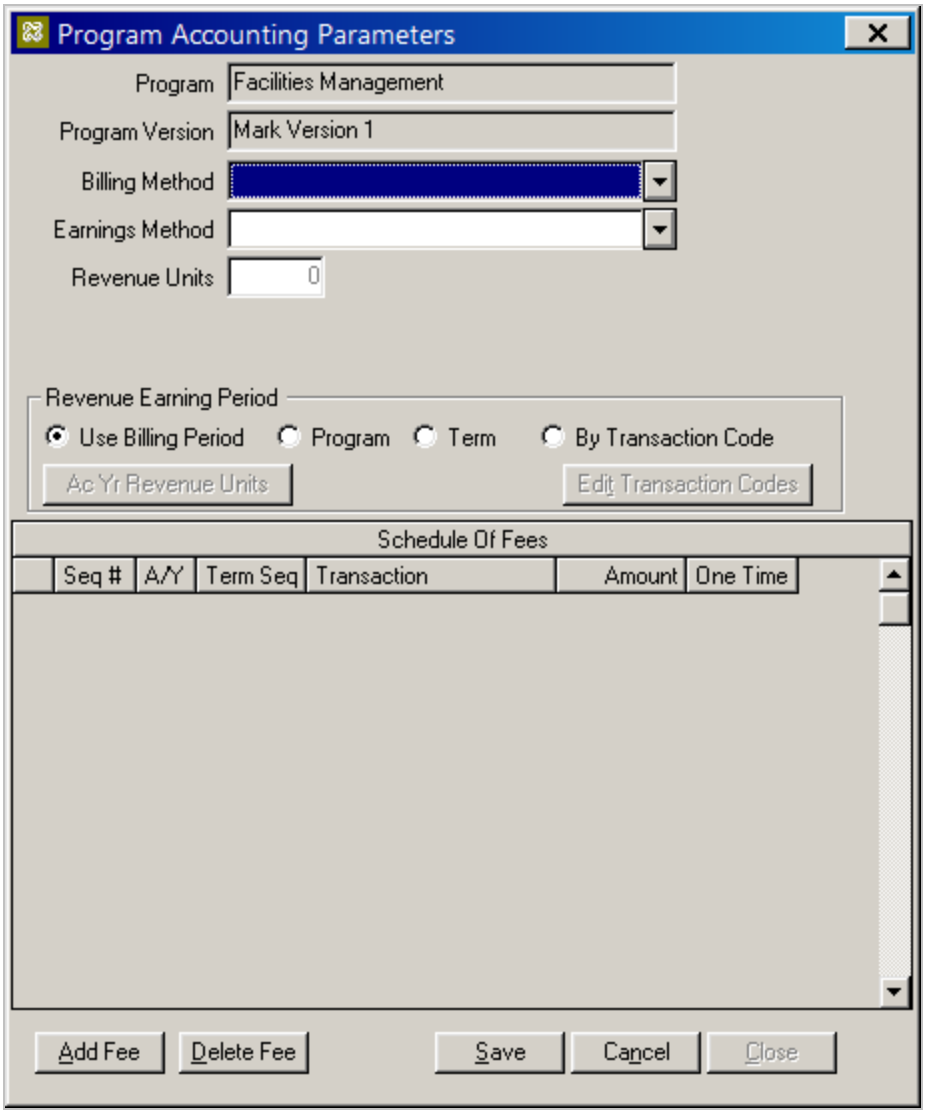
1. Navigate to **Lists** > **Student Accounts**. The Setup - Student Accounts Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Programs**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Student Accounts - Program Fees & Billing form is displayed. It lists all versions of the selected program.



6. Select the **Program Version** for which you want to set up the accounting parameters and click **Edit**. The Program Accounting Parameters form is displayed.



7. Click **Add Fee** to add a fee. You can add several fees in a row before saving them.

   Note: The TUIT code must be used to bill tuition via Registration Billing. Unless an unbilled TUIT item appears in a student's Fees folder, the student will not be gathered in the list of students to bill.

8. Specify appropriate options. For more information, see Field Descriptions - Program Accounting Parameters Form.

Field Descriptions: Program Accounting Parameters Form

Field	Description
Program	Read-only. This is the program you selected.
Program Version	Read-only. This is the program version selected.

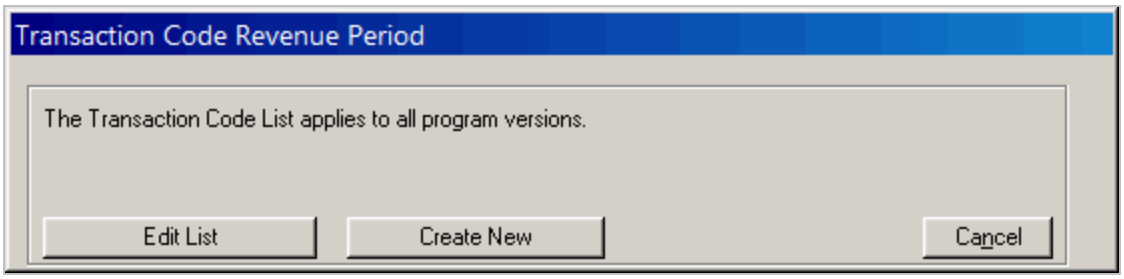
Field	Description
Billing Method	Select a billing method. Billing methods are set up under Lists > Student Accounts > Billing Methods. When the Billing Method for the program version is based on Term, CampusNexus Student prompts for the option of 'Revenue Earning Period'. For all other billing methods, this option is disabled and set to 'Use Billing Period. Specific requirements apply to Program Versions with Billing Method set to Academic Year.
Earnings Method	Select an earnings method from the list. Earnings methods are set up under Lists > Student Accounts > Earnings Methods.
Revenue Units	This field is optional . If the value is greater than zero and the revenue method is by Scheduled or Attended Hours, the revenue calculation uses this number for the total number of hours in the program. This is necessary because institutions may want to earn revenue on a different number of hours than the total hours for the program. For example, an institution has an Externship at the end of the program and wants to include the Externship in the total Program hours, but not in the revenue hours. **Note:** If the Program Accounting Parameters are set to 'Use Billing Method' for Revenue Earnings, the Revenue Units option is ignored.
Revenue Earning Period	Select one of the following options: • Bill by Academic Year • Program • Term • By Transaction Code If you select, By Transaction Code, CampusNexus Student enables the 'Edit Transaction Codes' button so you can select how each transaction code is to be earned. See the procedure to edit transaction codes. When the Billing Method is based on Academic Year, the 'Ac Yr Revenue Units' button is enabled to allow earning by Academic Year. When the Billing Method for the program version is based on Term, CampusNexus Student prompts for the option of 'Revenue Earning Period'. For all other billing methods, this option is disabled and set to 'Use Billing Period'.
Schedule of Fees: Enter any version-level charges in the Schedule Of Fees grid. Click **Add Fee** to add a new charge.	
Seq #	The Seq.# column is used to sort the program fees shown on the grid.
Term Seq	When saving the fees, if the billing is by Term, CampusNexus Student saves the value of the second column to the AdProgramFee.TermSequence column.
A/Y	The Academic Year (A/Y) column is always enabled. If the Bill method is dependent on term, the A/Y and term columns are displayed on the list, otherwise only the A/Y is displayed.

Field	Description
Transaction	Click in the Transaction field to enable the button. Select a transaction description from the list.
Amount	Specify the amount of the charge.
One Time	Select this option to indicate that the charge is one-time-only when a student is enrolled in the program version.

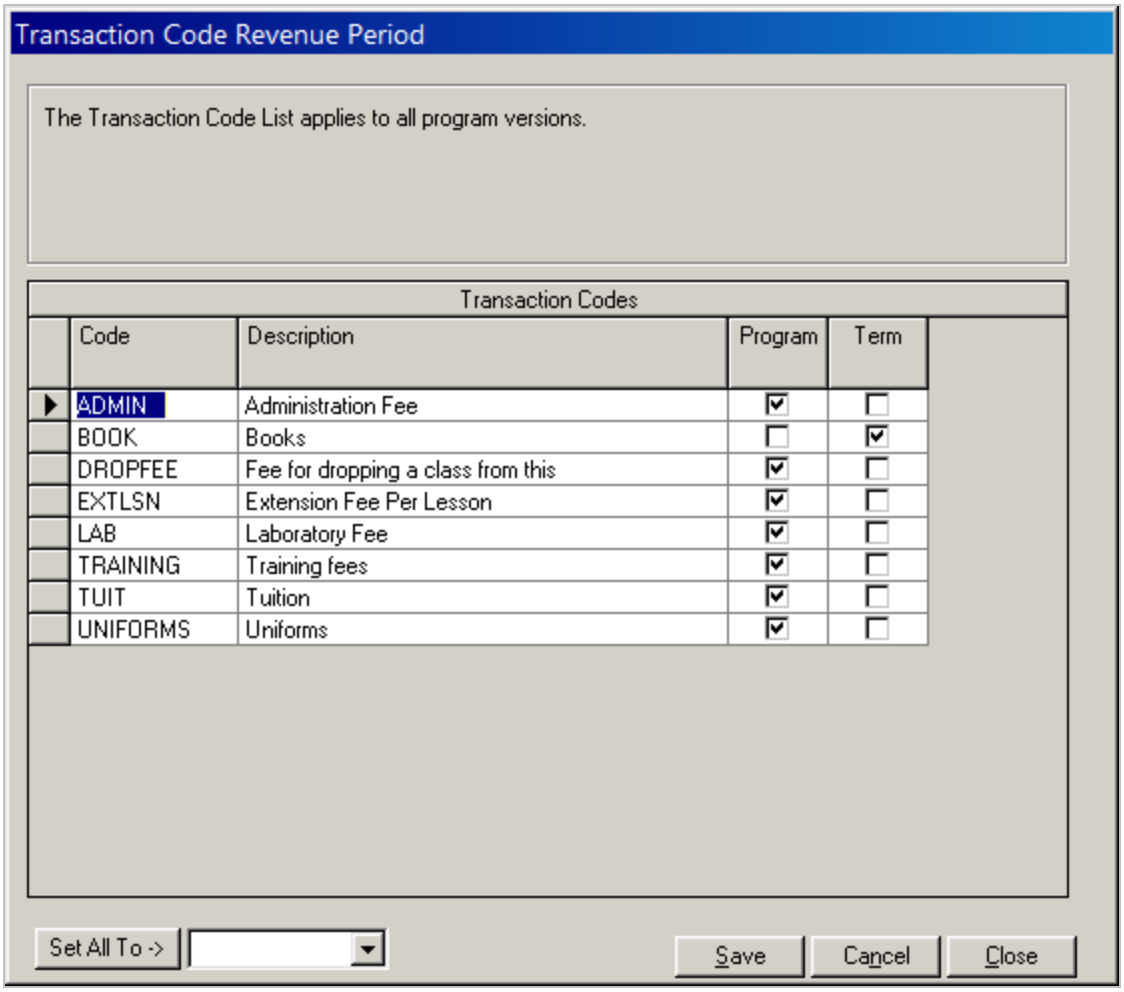
9. To delete a fee on the grid, select it and click **Delete Fee**. A confirmation message is displayed. Click **Yes**.
10. Click **Save**.

To edit transaction codes:

1. Click **Edit Transaction Codes**. The Transaction Code Revenue Period form is displayed.



2. Click **Create New** to add a transaction revenue period or **Edit List** to modify an existing one. The Transaction Code Revenue Period form is displayed.



Notes:

- The earning period labeled **Course Section** refers to the time frame for which the course is scheduled. In this configuration the TUIT code is not displayed in the list because it is hard coded to earn over the Course Section.

  You can select, by transaction code, how each code is to be earned. Click **Set All To** to set all transaction codes to the value select from the drop-down list. The values are Program and Term.

- When editing the transaction codes, the Earning Period (Program or Term) for each transaction code affects every program version in the system. (The Earning Period for each transaction code is stored in SaBillCode).

  Only transaction codes marked as "deferred earnings" transactions are listed in the grid. See Transaction Codes.

- When Billing Method frequency is set to Payment Period (E) and the Earnings Method unit is set to Days (D), an additional column labeled Payment Period is displayed and the Term grid is hidden.

  If Payment Period is selected, the value E is saved to the revenue period.

- When Billing Method frequency is set to Payment Period (E) with Post Transaction Details selected (both

located on the Billing Methods Code Setup form) and Earnings Method is set to Days, an additional labeled Course Section is displayed.

3. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Program Versions with Billing Method Set to Academic Year

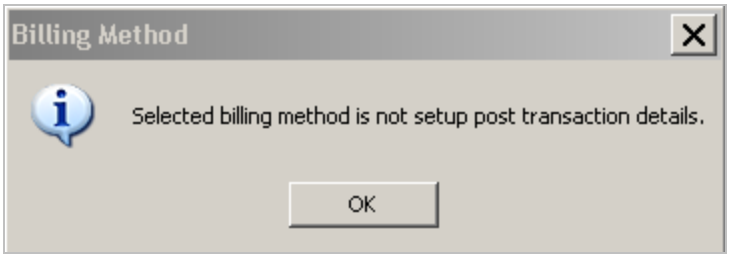
When a program version is set to earn by academic year, you can configure the number of units to earn throughout each academic year. CampusNexus Student performs the revenue recognition process ignoring the usual calculation of units and uses the override to earn as configured. This option works only under the following conditions:

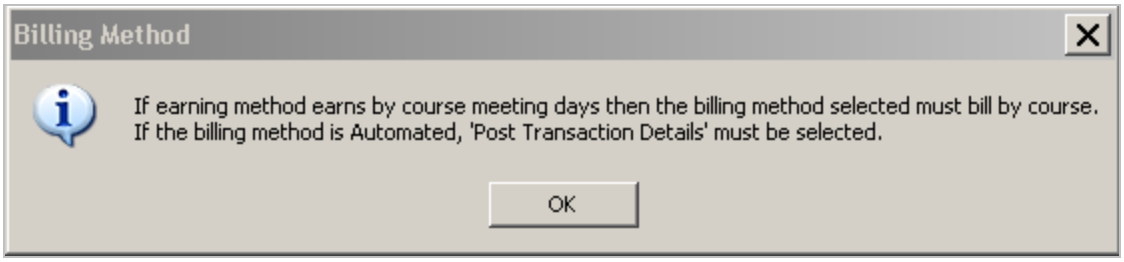
- Billing Method is set for Academic Year
- Earnings Method is Earn by Months, Weeks, or Calendar
- Program Accounting Parameters are set to 'Use Billing Period' for Revenue Earnings.

To check these settings, navigate to Lists > Academic Records > Programs > select a program > Program Versions > Add/Edit > Student Accounts > Associate Billing/Earning Methods > Program Accounting Parameters form.

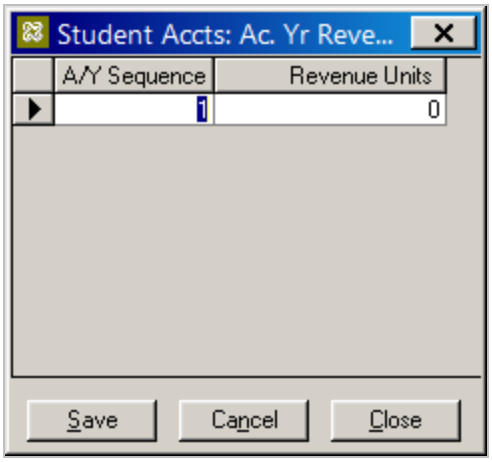
When the Billing Method is 'Bill by Course' and the Earnings Method is 'Course Meeting Days', only the 'By Transaction Code' option is available under Revenue Earning Period. The Billing Method must be 'Bill by Course', Automated with a Pending Charge Review that posts transaction details.

The following messages are displayed if the Billing Method is not configured properly:





The Ac Yr Revenue Units button is enabled which allows for earning revenue by Academic Year. When you click on the Ac Yr Revenue Units button, the Sequence and Revenue Units are displayed. These are the parameters specific to earning by Academic Year.



First Month Percentage Earnings

This feature allows a percentage of the total tuition charge to be configured to earn in the first month of revenue earning. You can set up each program version to earn a percentage of the total tuition charge. When revenue is run, the system earns the configured percentage in the first earning month for the student, allowing a higher amount of the student's tuition revenue to be recognized to cover some of the cost of a high drop rate.

By using an earnings calculation that allows institutions to recognize a higher amount of the student's tuition up front, the institution earns the configured percentage of the total tuition for the program in the first revenue period, with the remaining percentage earned over the remaining months of the program based on the number of calendar days that the institution is in session during the billing period.

Note: This feature assumes that the student is billed by program earning over the length of the program. Additionally, Configured Units on the program version are not allowed, and Tuition is the only transaction code that will be earned at 10% in the first month.

To configure first month percentage earning:

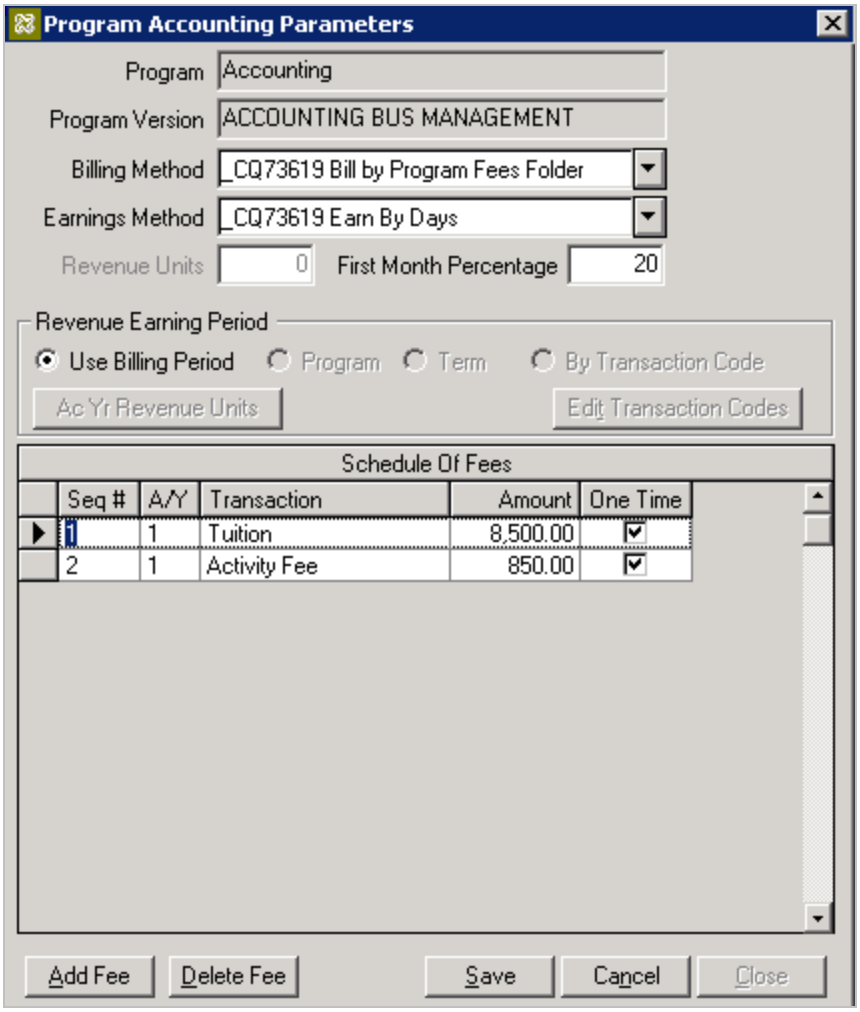
1. Navigate to **Setup > Student Accounts > General** (tab). The Student Accounts Settings form is displayed.
2. Select Yes for **Enable First Month Percentage** to allow the institution to earn a percentage of the total tuition charge in the first month of earning.

   This setting allows the registry Key for Percentage based earning to be set to "1" when the following conditions are true:

   - Registry key for first month Percentage value is set to ‘1’;
   - Billing method assigned to the Program Version is set to use a frequency of ‘Program;
   - Revenue Period is set to "Use Billing Period";
   - Earning method assigned to the program version is set to"Days",
   - Earning method Late Charge earning option is set to Amortize over the remaining time in the period.

   The system will earn the percentage configured of the total charge in the first month of earning for the Revenue Period only. After the first month of earning, the system will amortize the unearned remaining amount equally over the remaining time in the earning period.

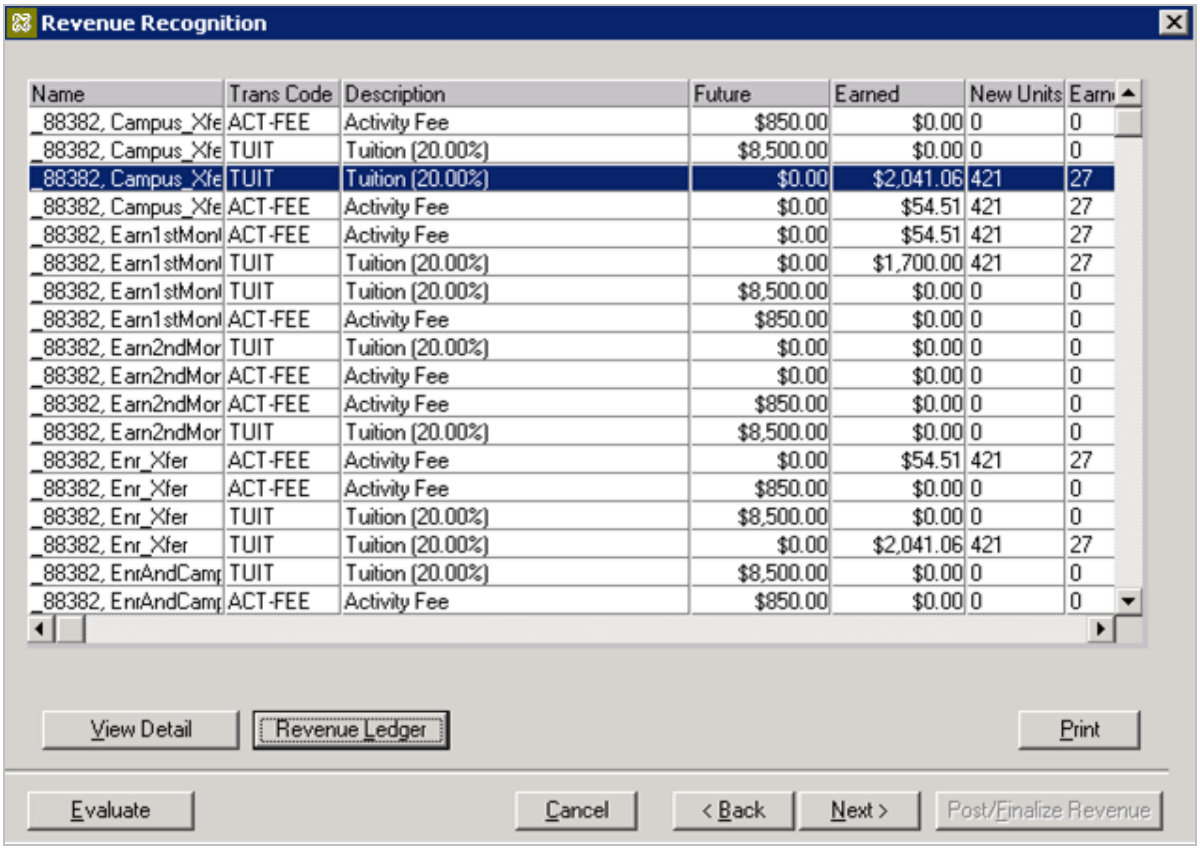
   When the above conditions are met, the Program Accounting Parameters form is displayed.
3. In the **First Month Percentage** field of the Program Accounting Parameters form set up a first month's earning percentage on tuition. The value in this field must be a numeric value no greater than 100 percent.



4. To view the earning on a standard student using percentage earning in the first month and amortizing over the remaining revenue period for subsequent months, run **Revenue Recognition** (Daily > Student Accounts > Revenue Recognition).

   Notice that the first month percentage is greater than zero and that it is a TUIT charge. When revenue is calculated, any charge with a First Month Percent Earn Charge = 1 will earn the percentage of the total charge in the first month of earnings and amortize the unearned remaining amount equally over the remaining time in the earning period.

   - If student is a re-entry into the same program version, the student will not earn the percentage again. The units for the revenue earning period are calculated from the re-entry date to the Revenue Period End Date configured in the earning method. If the student re-enters into a different program version, a new enrollment is created and new charges earn the percentage in the first month of earning.
   - If a student is transferred into a program version that is configured to earn percentage in the first month, and the student has already earned the percentage in the old enrollment, the unearned revenue amount transferred from the old enrollment will not earn the percentage in the first month of earning under the new enrollment. If the student has not earned the percentage in the old enrollment, the unearned revenue amount transferred from the old enrollment will earn the percentage in the first month of earning under the new enrollment.


Revenue Recognition
Name
Trans Code
Description
Future
Earned
New Units
_88382, Campus_Xfe ACT-FEE Activity Fee $850.00 $0.00 0 0
_88382, Campus_Xfe TUIT Tuition (20.00%) $8,500.00 $0.00 0 0
_88382, Campus_Xfe TUIT Tuition (20.00%) $0.00 $2,041.06 421 27
_88382, Campus_Xfe ACT-FEE Activity Fee $0.00 $54.51 421 27
_88382, Earn1stMonl ACT-FEE Activity Fee $0.00 $54.51 421 27
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_88382, Earn2ndMor TUIT Tuition (20.00%) $8,500.00 $0.00 0 0
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_88382, Enr_Xfer ACT-FEE Activity Fee $850.00 $0.00 0 0
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_88382, Enr_Xfer TUIT Tuition (20.00%) $0.00 $2,041.06 421 27
_88382, EnrAndCamp TUIT Tuition (20.00%) $8,500.00 $0.00 0 0
_88382, EnrAndCamp ACT-FEE Activity Fee $850.00 $0.00 0 0
View Detail
Revenue Ledger
Print
Evaluate
Cancel
< Back
Next >
Post/Finalize Revenue

Setup - Student Account Lists [Refund Policies]

The U.S. Department of Education, your state's department of education, and your institution's administration may have different policies and procedures for refunding money to students when they leave the institution before completing their programs. Typically, the refund policy that is most advantageous to the student must be the one selected at the time the calculation is made. Refund calculations are triggered for a given student.

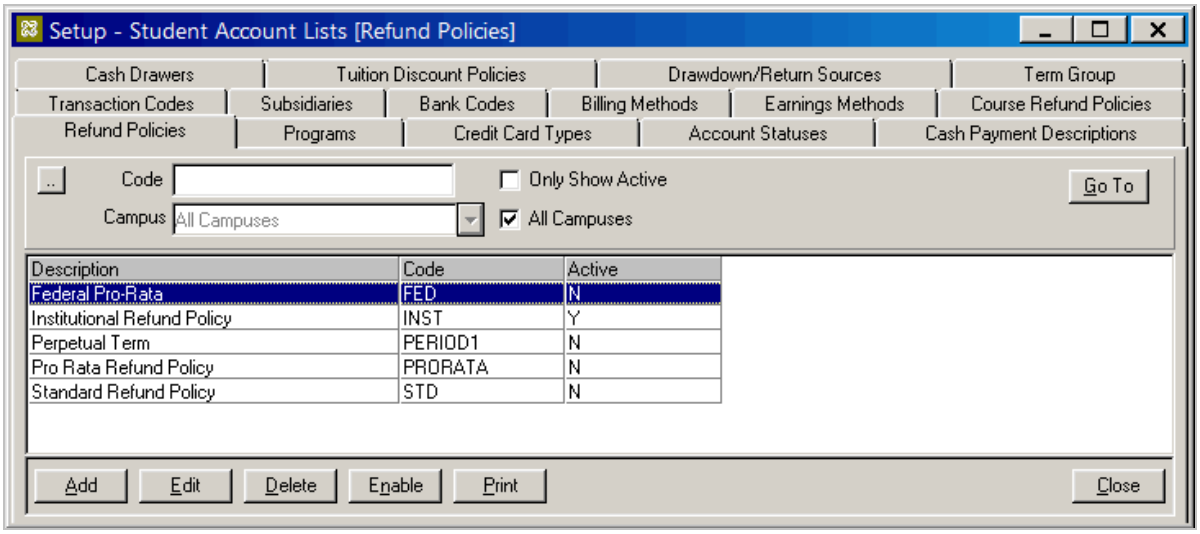
The refund calculation in CampusNexus Student supports straight pro-rata refund policies.

The refund policy allows the length conditions to be based on different units than the policy itself. Many refund policies have an initial condition that is based on withdrawing in the 1st week of class; however, the remaining conditions are based on scheduled hours. You may need to set up several refund policies from which to select in different circumstances.

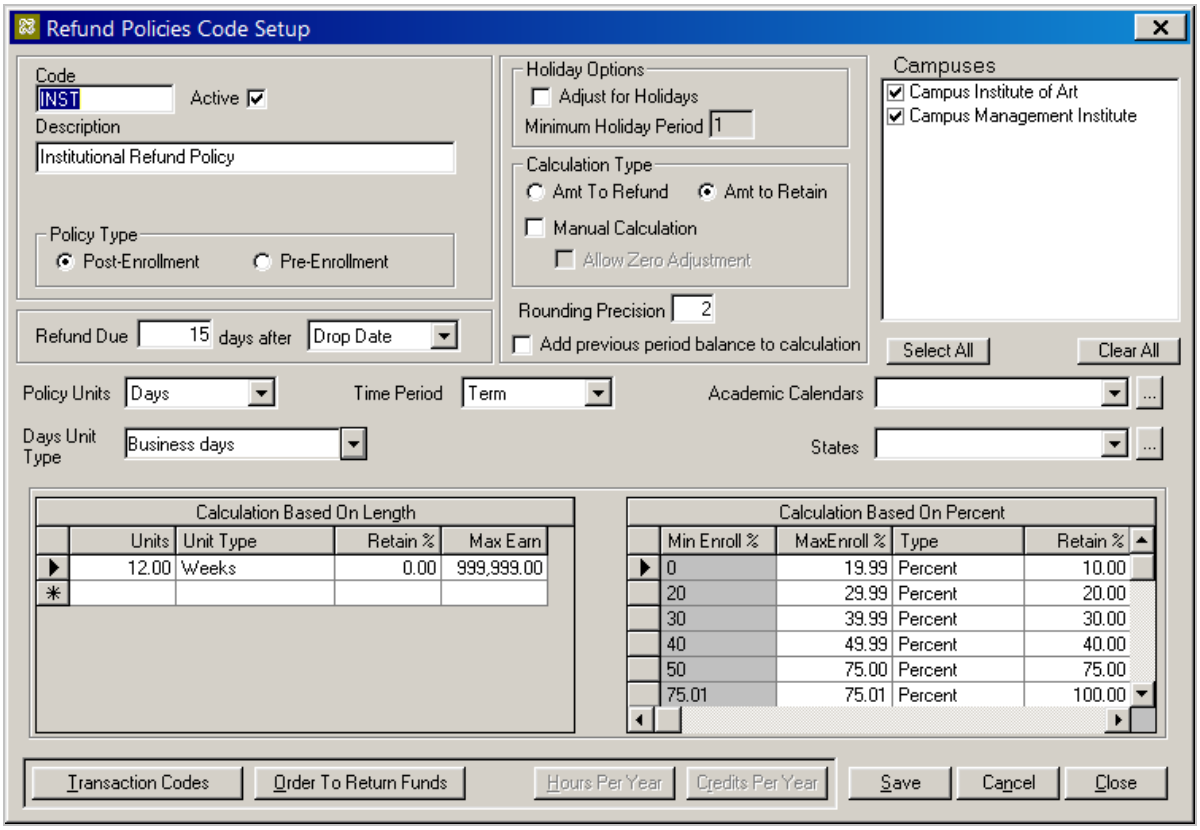
Best Practice: If an existing refund policy ever needs to be changed, mark the existing refund policy as “Inactive” and create a new refund policy containing the changes. This allows for all details of the inactive refund policy to be viewed at a later point in time if auditing a refund calculation that was done on that policy.

To add or edit list of refund policies codes:

1. Navigate to **Lists** > **Student Accounts**. The Setup - Student Accounts Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Refund Policies**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
6. Click **Add**, or select a record and click **Edit**. The Refund Policies Code Setup form is displayed.



Note: The refund calculations are first based on the Calculation Based on Length grid, then on the Calculation Based on Percent grid. You can use either or both of these grids in defining your refund policy.

7. Specify appropriate options. See Field Descriptions.
8. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

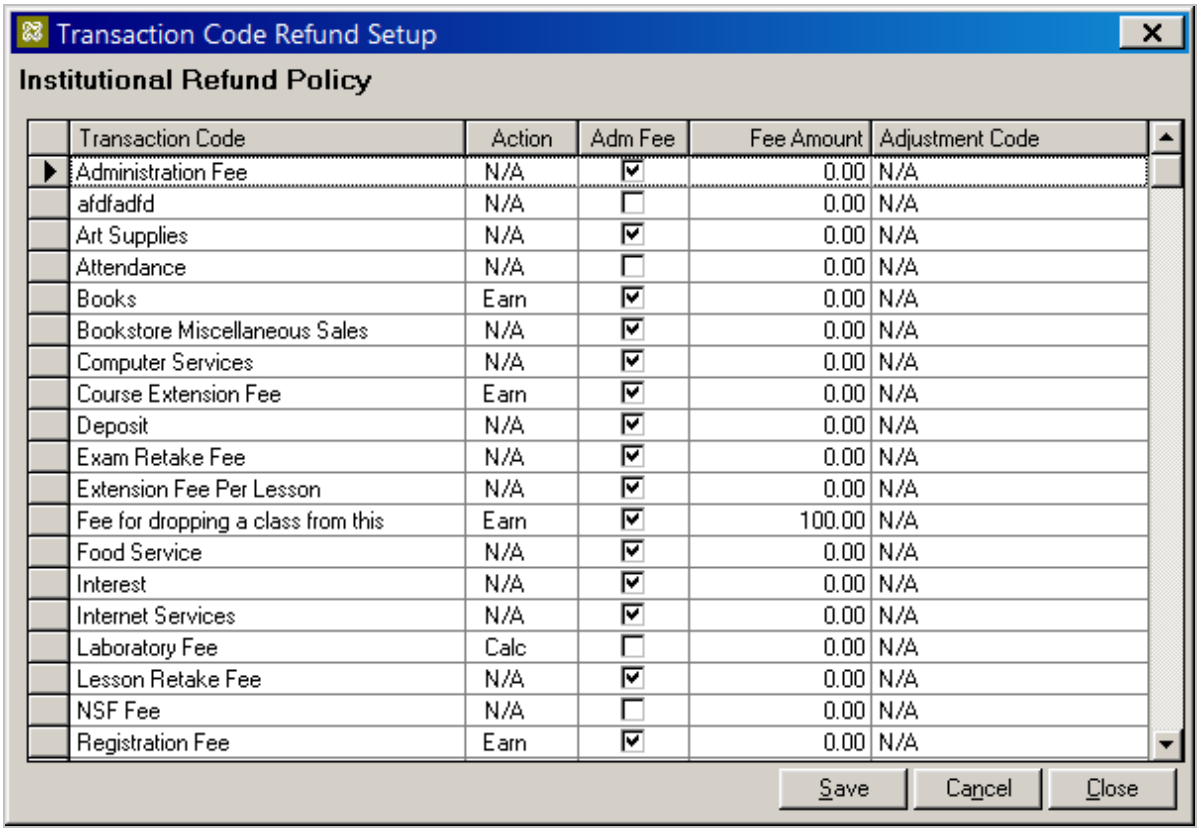
Field Descriptions

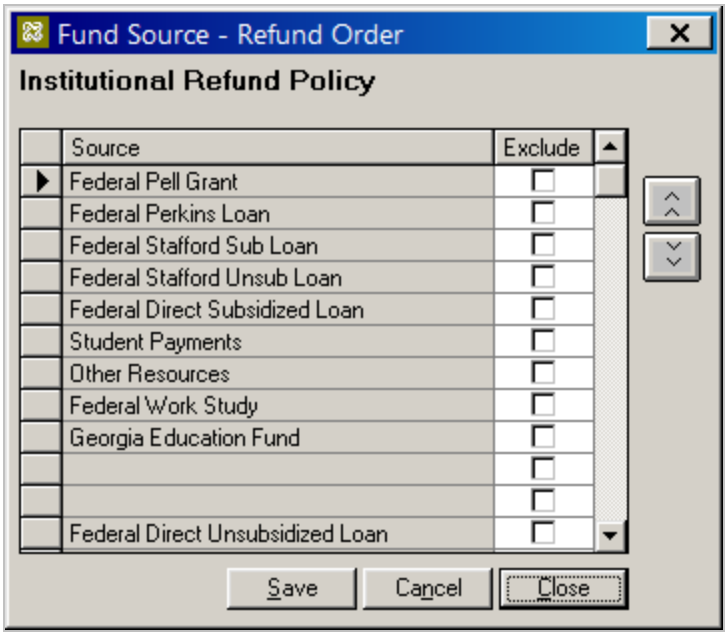
Field	Description
Code	Enter a code for this refund policy.
Active	Select or clear the Active flag as required. Clear the flag if this is no longer an active refund policy.
Description	Enter a description for this refund policy.
Policy Type	Select Post-Enrollment or Pre-Enrollment.
Campuses	Select the campuses to which this policy applies. Multiple campuses can be related to the same refund policy. At least one campus must be selected before a new refund policy record can be saved.
Refund Due X days after	The option is dependent on the list selection. The refund may be paid x days after the refund is calculated, at Last Date of Attendance, or the student's Drop Date. Specify a whole number.

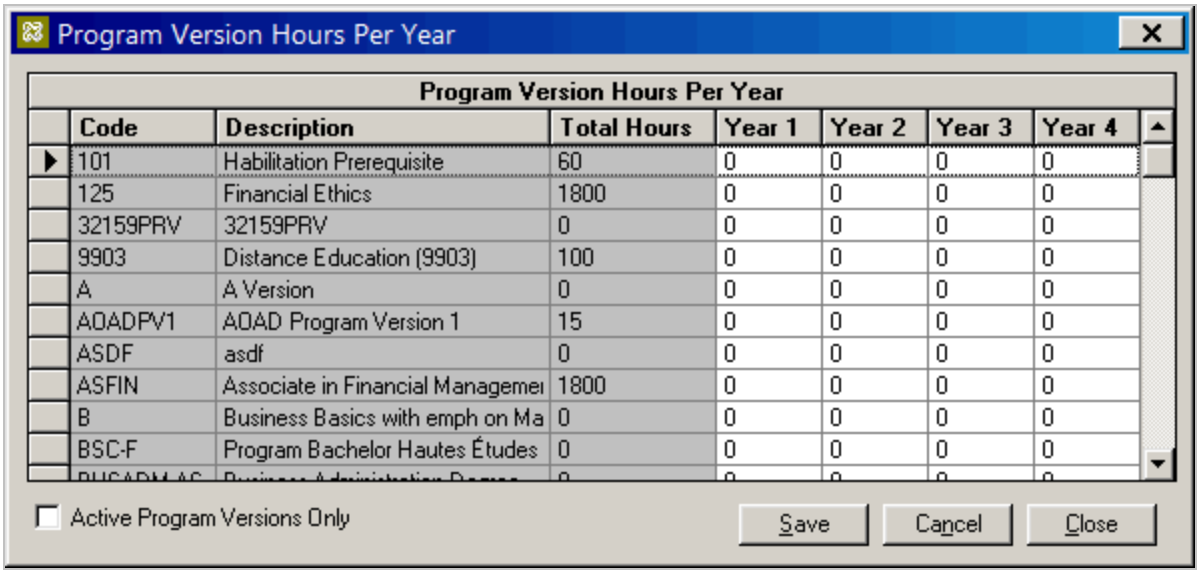
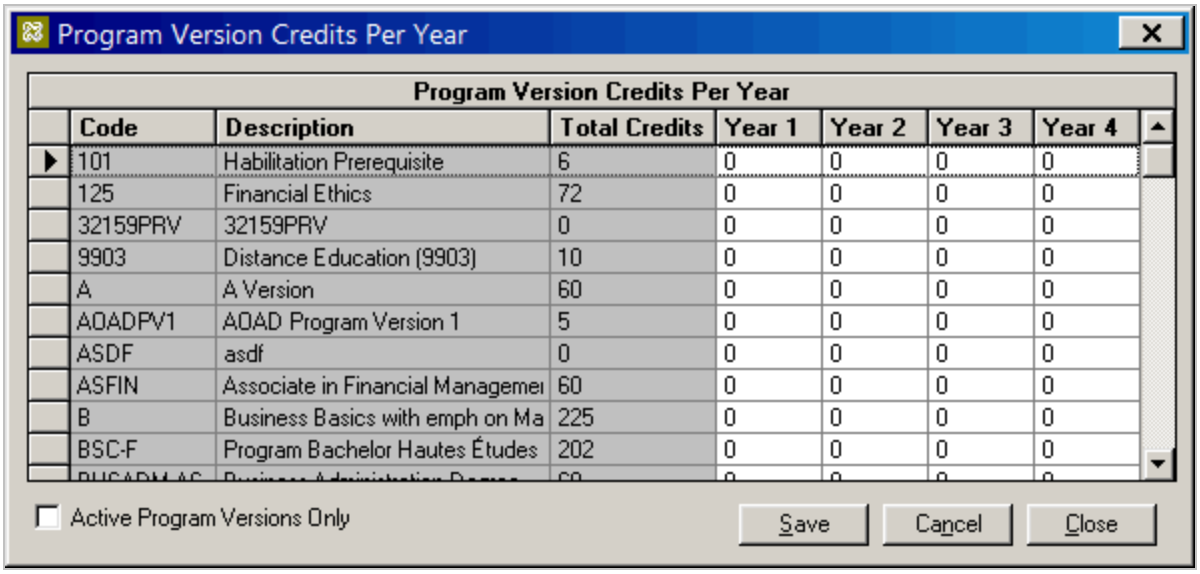
Field	Description
Policy Units	Select Weeks, Scheduled Hours, Hours Attended, or Days.
Time Period	This field determines the basis of the refund. The options are: • Use Billing Method (on enrollment) • Program • Term, • Academic Year • Calendar Year. Institutions can indicate whether tuition charges included in their refund policy's institutional charges are derived from the values posted: a. To student's ledger b. To Student Fees Folder c. From the total program charges configured on the Financial Aid (FA) Program Version when Program is selected for the refund policy's time period. If Program is selected, the default option is to use Tuition Charges from the Ledger Card. Selecting Program displays the Tuition Charges text box with Ledger Card as the default. Other options are FA Program Setup and Student Fees Folder, which determine how the tuition component of the Refund Calculation's Institutional Charges are calculated if the institution bills by term; however, the refund calculation is based on the entire program. **Note**: The FA Program Setup option and the Student Fees Folder option are only be enabled if the refund policy's selected time period is Program. CampusNexus Student determines the tuition charges included in the institution charges based on the method selected by the institution: • If Net Amount from Ledger Card is selected, the calculation uses the amounts posted to the student's ledger. • If From Student Fees Folder is selected, the tuition and all other institutional charges are derived from those populated in the Student Fees Folder. • If Tuition from FA Program Version is selected, tuition that is included in the institutional charges is determined as follows: ◦ The tuition amount used is the same value populated in the Tuition column of the grid on the Program Costs tab of the FA Programs Code Setup form. ◦ The effective date is used to determine which tuition amount to use if there are multiple tuition amounts configured for the program version by comparing the student's start date to the effective date that applies to that student's start date. ◦ The effective date is used to determine which tuition amount to use if there are multiple tuition amounts configured for the program version by comparing the student's start date to the effective date that applies to that student's start date. The current method for determining other components of the institutional charges such as fees is preserved, that is, only the method for determining the tuition component of the institutional charges is being discussed.

Field	Description
Academic Calendars	This field determines the type of academic calendars that apply to your institution. Select an option from the list. If your institution uses multiple academic calendars, click ... and select as many academic calendars as needed. The options are: • Non-standard terms • Standard terms of quarters • Standard terms of semesters • Standard terms of trimesters • Clock Hours • Credit hours without terms
Weeks Calc Type	This field is enabled only if Policy Units is Weeks. Select how your institution defines a week. • Scheduled Instruction Days calculates the number of weeks based on at least one class session per calendar week (Sun-Sat). • Calendar Days (default) totals the number of days in the time period calculation minus holidays—if that option has been enabled—divided by seven.
Adjust for Holidays	Select this option if you want CampusNexus Student to adjust for holidays.
Minimum Holiday Period	Specify the minimum number of days that can be considered holiday time.
Calculation Type	Select Amt to Refund or Amt to Retain.
Manual Calculation	Institutions can manually enter refund calculations into students' Refund Calculation folders, and then have CampusNexus Student update the calculated values in the database so that these values can be displayed in Refund Reports, enabling institutions to report on the timeliness of refund calculations for their entire portfolio of institutions; even if these calculations were not made in CampusNexus Student. Select this option to manually enter refund calculations. The two grids on the bottom of the screen are disabled. • If there is no record in the Calculation Based On Length and Calculation Based On Percent grids and Manual Calculation is selected, you can save the policy when editing a refund policy. • If there is a record in one or both grids and Manual Calculation is selected, both grids are disabled. When you try to save the policy after editing it, a message states that selecting Manual Calculation for this policy will remove any data in both grids. ◦ If you choose not to continue, the data on the grids remains, the grids are disabled, and the Manual Calculation check box is selected. Closing the form and reopening it again will show the Manual Calculation check box as cleared with both grids enabled. ◦ If you choose to continue, any data in the grids is removed, the two grids are disabled, and the Manual Calculation check box is selected. Closing the form and reopening it again will show the Manual Calculation check box as selected with both grids disabled.
Allow Zero Adjustment	This option allows 0.00 tuition adjustments to be posted. This check box is only enabled when Manual Calculation is selected. By default, this check box is disabled.

Field	Description
Rounding Precision	This field determines how the refund amounts are calculated. This field is used with the Policy Units field. It determines how many decimal places to use in the results of calculations using Policy Units.
Add previous period balance to calculation	Select this option to include the previous term balance in the refund calculation.
Calculation Based On Length	This grid is considered first. • Units Attendance - Enter the number of attendance units for this row. • Unit Type - Attendance Units. Valid values are Weeks, Hours Attended, Hours Scheduled, Days. The Attendance Units column is used to determine what unit the Length condition applies to. • Refund (Retain) Percentage - Enter the percentage to refund or retain for this row. • Max Earn - Enter the maximum amount that can be earned at this level of policy units completed.
Calculation Based On Percent	This grid is considered second. • Minimum Enroll Percentage - Enter the minimum percentage of the enrollment completed by the student. • Maximum Enroll Percentage - Enter the maximum percentage of the enrollment completed by the student. • Type (Refund Percent Flag) - Valid values are Pro Rata or Percent. The Type (Refund Percent Flag) column determines if the percentage to refund/retain comes from the Refund Percent field or if the percentage to refund or retain is the actual percentage completed by the student. For straight pro rata policies, the percentage of tuition earned by the institution correlates exactly to the percentage of the program the student completed. For example, if the student completed 47% of the program before dropping, the institution retains 47% of the tuition. • Refund (Retain) Percentage - Enter the percentage of funds received to be refunded or retained.

Field	Description
Trans-action Codes	This button is enabled after you save a new course refund policy and when you edit an existing policy. When you click **Transaction Codes**, the Transaction Code Refund Setup form is displayed.  Indicate which transactions are involved in the refund. For each transaction code, select one option under **Action**: • Calc - include the charge in refund calculations. • Earn - charge is 100 percent earned when charged. • Reverse - reverse the charge on the student's ledger card (net to zero) before refund is calculated. • N/A - the charge is not applicable to the refund calculation. Select or clear the **Adm Fee** check box beside each transaction to indicate that an administration fee will be charged for this transaction. If you select a check box, enter the amount of the fee under **Fee Amount**. Select a row under the **Adjustment Code** column to map/assign an adjustment (transaction) code to a **Transaction Code**. A pre-populated drop-down list appears displaying Transaction Codes that meet the following conditions: a. Active b. Associated with campuses that belong to the Refund Policy c. Bill Type is "S" for Student or "B" for Both. By default this column is populated with "N/A" for those Transaction Codes which have not been assigned. "N/A" appears in the drop-down list as an option because this will be needed should you need

Field	Description
	to remove an existing mapping. An Adjustment Code can also be used as a standard Transaction Code on the Student Ledger as users may want to post manual adjustments.
Order To Return Funds	This button is enabled after you save a new course refund policy and when you edit an existing policy. When you click **Order To Return Funds**, the Fund Source - Refund Order form is displayed.  Arrange the listed fund sources in the order that you want funds returned. When the refund calculation is made, the amount to be refunded is applied to each source in turn until the calculated amount is exhausted. For example, the refund calculation determines that a total of $2,000.00 is to be refunded to the various fund sources. The student received a $1,000.00 Pell Grant, $2,000 was disbursed from a subsidized Stafford loan, and the student paid $500.00 in cash. Of the calculated refund amount, $1,000 would be refunded to the Pell Grant program, $1,000.00 would be refunded to the Stafford loan source, and nothing would be refunded to the student. To move a fund source closer to the top of the list, click the fund source to be moved, then click the up arrow button repeatedly until the fund source appears in the correct position. To move a fund source down in the list, click the fund source to be moved, then click the down arrow button repeatedly until the fund source appears in the correct position. When the **Exclude** check box is selected, the Fund Source is excluded from the refund.

Field	Description
Hours Per Year	This button is available only if you selected Hours Attended or Hours Sched for Policy Units and Calendar for the Time Period. When you click **Hours Per Year**, the Program Version Hours Per Year form is displayed. This form displays the total number of hours required for each program version and enables the authorized user to set a number of hours for each year of the program. 
Credits Per Year	This button is available only if you selected Hours Attended or Hours Sched for Policy Units and Calendar for the Time Period. When you click **Credits Per Year**, the Program Version Credits Per Year form is displayed. This form displays the total number of credits required for each program version and enables the authorized user to set a number of credits for each year of the program. 

Setup - Student Account Lists [Subsidiaries]

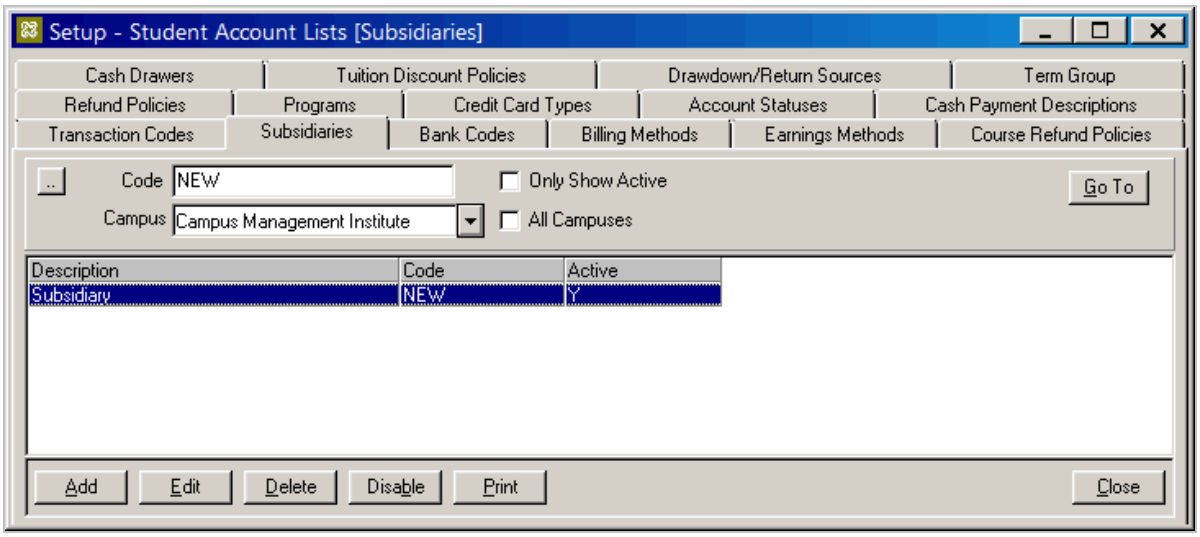
Subsidiary ledgers are used to bill services not reflected in the student ledger card, for example, housing, meal plans, parking fees, etc. Money added to the subsidiary must be recorded on the general ledger and be accessible to ensure that a student has funds in the account. This functionality allows any number of subsidiary accounts to be created with transaction codes linked to them. These transactions will not affect the student ledger card balance but will affect the balance of the subsidiary.

If CampusNexus Student is integrated with an accounting system, see Student Accounts - General Ledger Link Form.

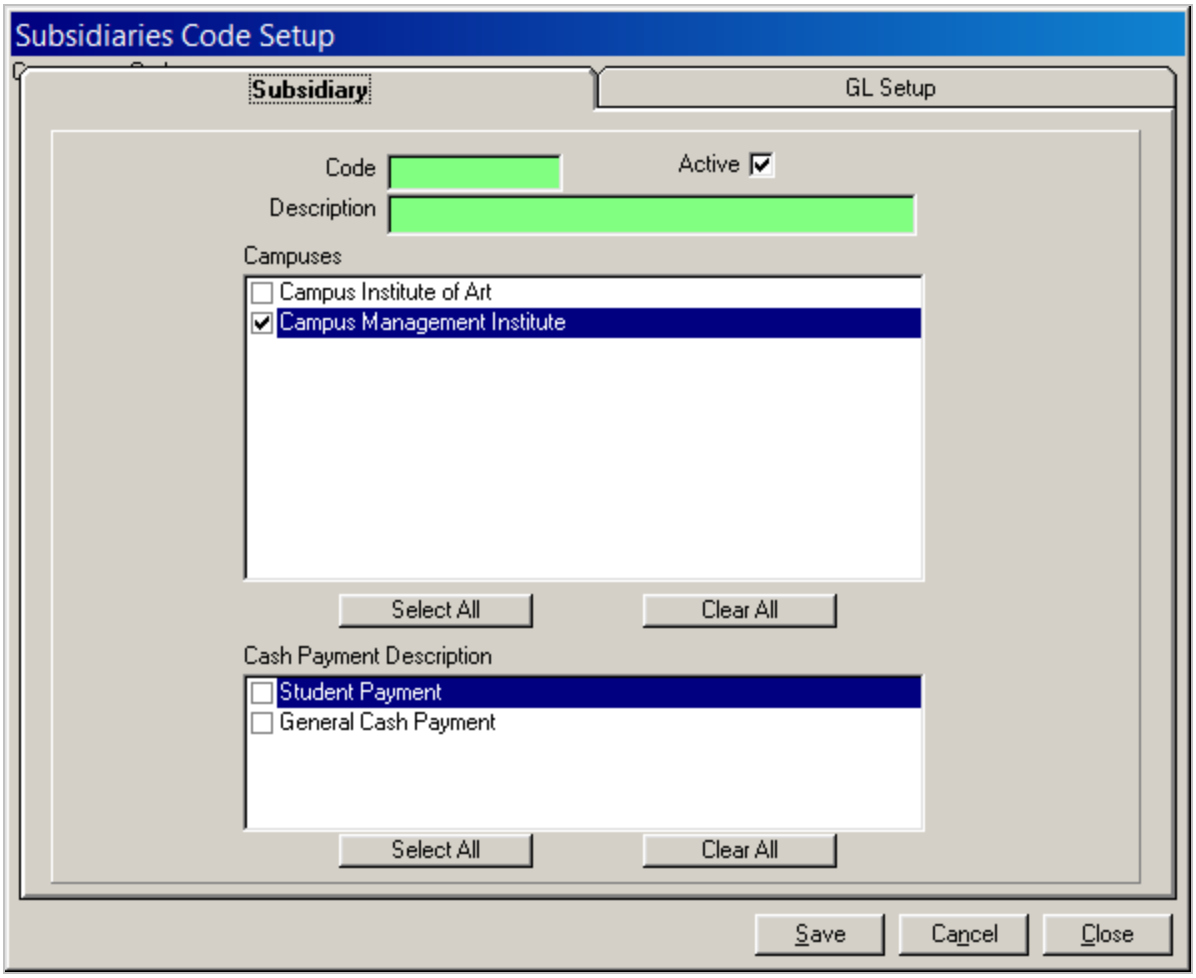
Funds can also be released from a subsidiary to the student general ledger card to address situations that arise, such as when a student pays a housing deposit and then must be charged for damages out of that deposit.

To add or edit a list of subsidiaries codes:

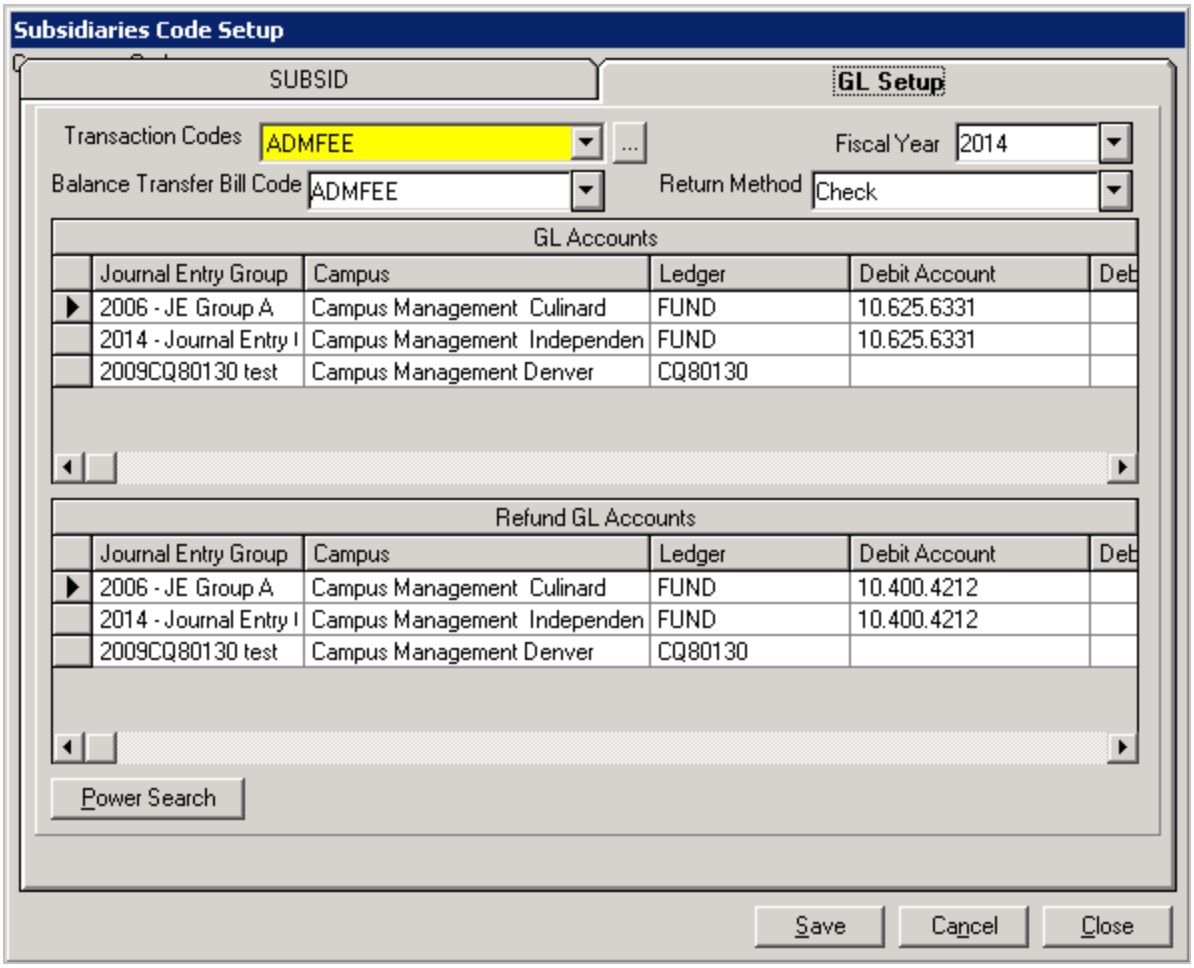
1. Navigate to **Lists** > **Student Accounts**. The Setup - Student Accounts Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Subsidiaries**.



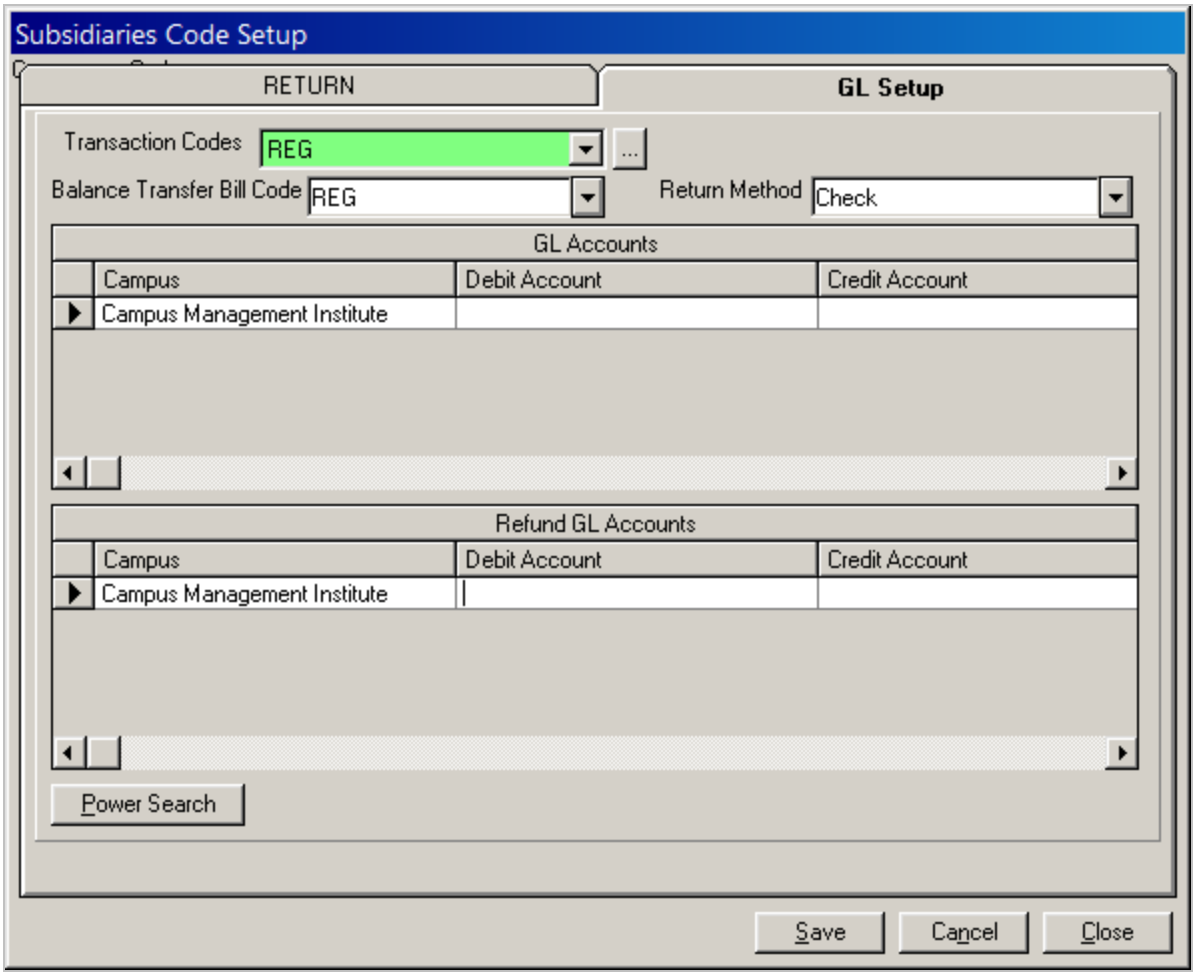
3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
6. Click **Add**, or select a record and click **Edit**. The Subsidiaries Code Setup form is displayed.



7. Specify a unique **Code**.
8. Enter a **Description**..
9. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
10. Select one or more **Campuses**.
11. Select the **Cash Payment Description**(s) which will be the default when posting payments to the subsidiary.
12. Click the **GL Setup** tab.



When CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll, the GL Setup tab provides Debit Account and Credit Account fields for GL Accounts and Refund GL Accounts for the selected Campus. You can create subsidiary transactions and release subsidiary transactions to CampusNexus Finance, HR & Payroll. Subsidiary transactions include Subsidiary Charges, Subsidiary Payments, and Subsidiary Refunds. You can set up accounts from a master Chart of Accounts (COA) list and select valid ledger accounts whenever they are needed. For more information, see GL Link.



13. Specify the Transaction Codes associated with the subsidiary. You can select multiple transaction codes. The transaction code list is filtered to include only active transaction codes and only those transaction codes whose campus list is included in the campus list associated with the subsidiary.

    CampusNexus Student validates that a transaction code is linked to only one subsidiary. If a transaction code that is linked to a subsidiary is selected to be linked to another subsidiary, a warning message is displayed. If you proceed, the transaction code will be unlinked from the other subsidiary.

    You can associate a transaction code with multiple subsidiaries.

    Note: A transaction code used in a subsidiary will not be available for use in the Student Ledger, even though all transaction codes are in the same tab as those for Miscellaneous Receipts and Student Ledger transactions.

14. Specify the **Balance Transfer Bill Code** to be associated with the Subsidiary. From all the Transaction Codes you selected, select one which will be used as the default if a subsidiary balance is transferred through the Daily menu (Daily > Subsidiaries > Schedule Refunds/Transfer Balance).

15. Specify the **Return Method** to be associated with the Subsidiary as the default when a refund is processed through Daily > Subsidiaries > Schedule Refunds/Transfer Balances.

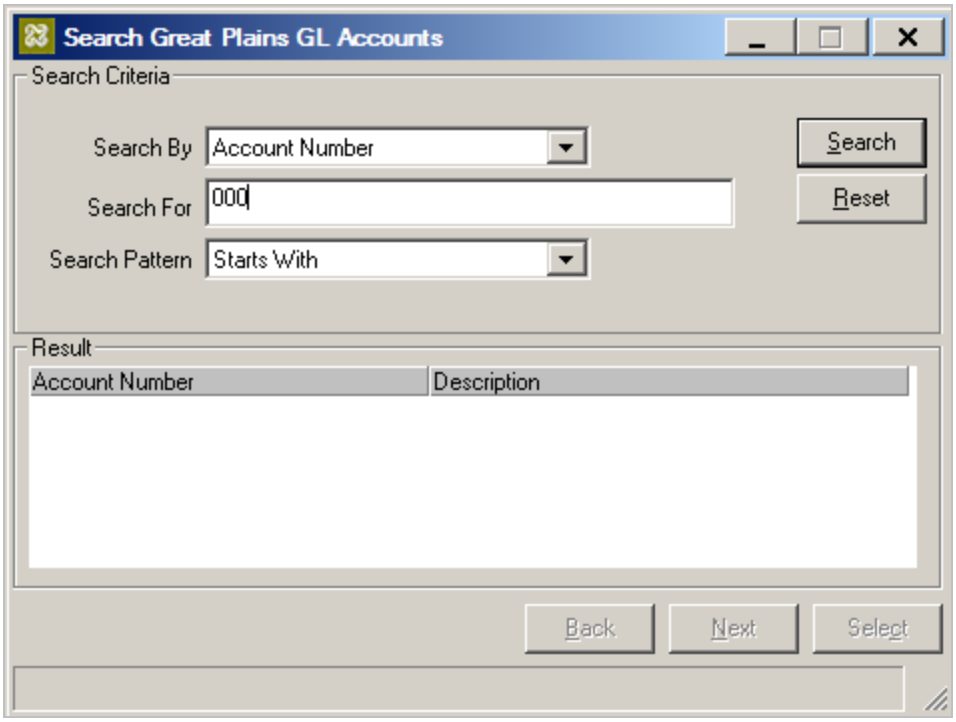
16. Specify the G/L account numbers associated with this subsidiary to ensure payments to the subsidiary are applied to the correct G/L account.

To view the GL Accounts and Cost Accounts that relate to the transaction code, go to the GL Link transaction code record for that campus and fiscal year (**Setup > Student Accounts > Additional** (tab) > G/L Link (button)).

- If the Great Plains search feature is enabled, select a row, and click the **Great Plains Search** button to search for Debit Account or Credit Account numbers in the Great Plains GL.

    a. In the Search Great Plains GL Accounts form, click the **Search By** list. Search for GL Accounts using the **Account Number** or **Description**.

    Note: These searches also return Stipend Account information when you have set up separate debit and credit account numbers for stipends.



    b. In the **Search For** field, enter the account number or description.

    c. Specify the **Search Pattern**. The Search pattern works as follows:

        - “Starts With” finds an exact match on data that starts with the characters you specify.

          Enter dashes when using this method. For example, if you have a mask that uses ###-####-## and you enter 0000, you will not get any matches. You must enter 000- or 000-0 to get matches, where the first four digits in the account number are zeros.

        - "Contains" finds any value that contains what you have entered.
        - "Wildcard" searching uses % for any string that follows what is entered. The "_" only replaces a single character.
        - "Exact Match" must contain everything you enter. There cannot be additional characters before or after what was entered. If you are not sure of the exact wording, choose “Contains”.

    d. Click **Search**. All GL Accounts that meet the specified criteria are displayed in the result grid.

Based on the value specified in the Max GP GL Account Search field, the results grid displays the data in one page or across many pages. If there are more records than the default number of rows, CampusNexus Student displays:

- Number of records displayed.
- Total number or records matched.
- A Next button to display the next records matched.

e. Double-click the applicable row, or click **Select** to add the account details to the Debit Account or Credit Account field.

f. Click **Save**. CampusNexus Student saves all records for all campuses that use Great Plains, that contain both a valid Debit and Credit Account or both the Debit and Credit accounts are blank. An error message is displayed if any campus that uses Great Plains is using an incorrect Debit and/or Credit account.

The **Reset** button on the Search GP GL accounts form clears the fields for a new Search.

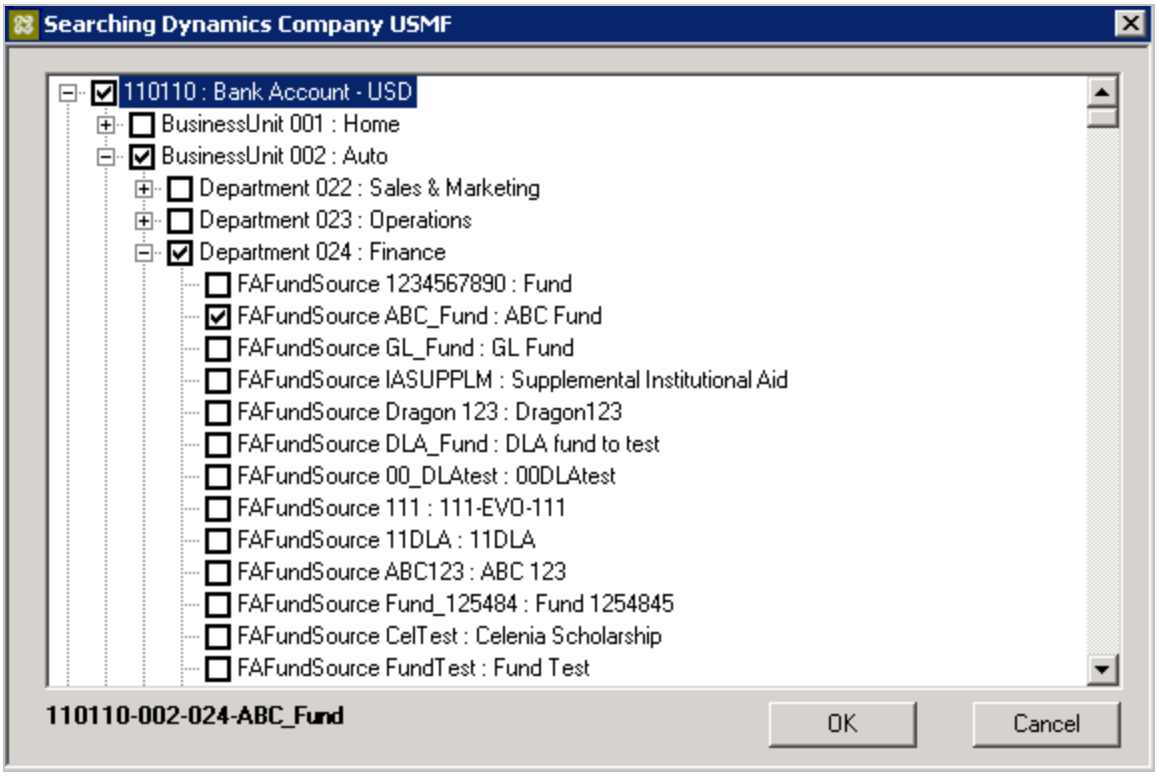
- If CampusNexus Student is integrated with CampusVue Finance, HR and Payroll or CampusNexus Finance, HR and Payroll, select a row and click the **Power Search** (for CampusVue Finance, HR and Payroll) or **Select GL Account** (for CampusNexus Finance, HR and Payroll) button to search for the appropriate GL Debit and GL Credit accounts.
  - If using CampusVue Finance, HR & Payroll, select the appropriate Ledger Account and click **OK**.
  - If using CampusNexus Finance, HR & Payroll, select the appropriate dimension attribute and click **OK**.

Note

- Your permissions in the accounting system determine which GL accounts you can view and select in CampusNexus Student.
- The Main account node can be displayed at any level in the account hierarchy. This is based on the account structure setting that is configured in Microsoft AX. For information about this setting, your administrator must see Microsoft AX Help.

When you click **Save** after selecting the account, the system validates your selection against the account structure setting in Microsoft AX. This validation also occurs when transactions are released to

G/L.



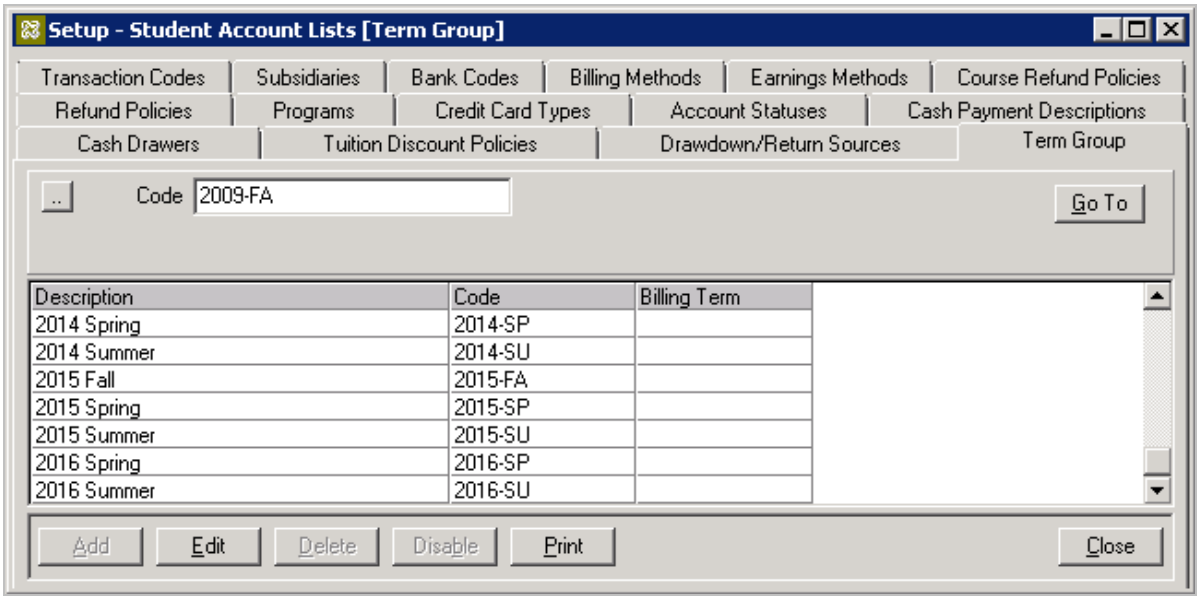
17. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Student Account Lists [Term Group]

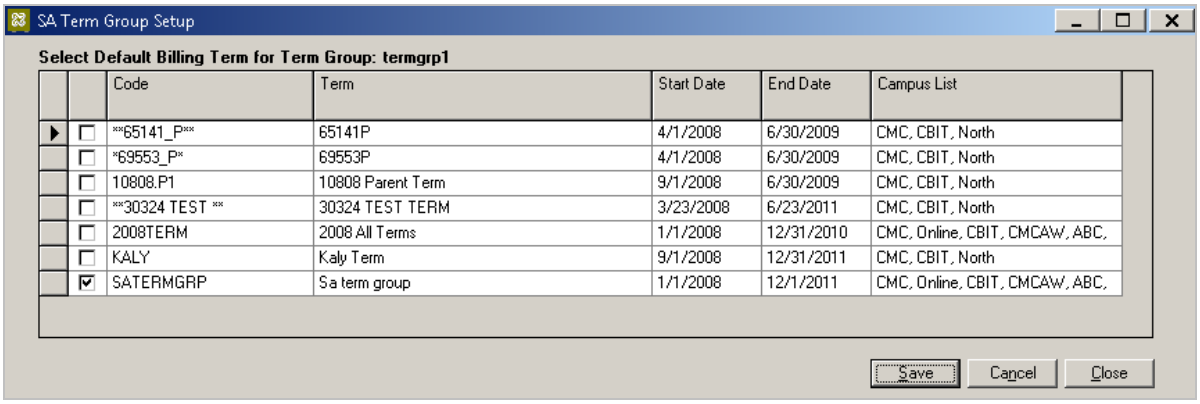
Use the Setup - Student Account Lists [Term Group] form to select a default billing term from within a term group or another student account term with applicable start and end dates. When aggregating credits across a term group, the charges are posted against the default billing term. The default billing term must be shared amongst all campuses in the term group and can be associated with only one term group at a time.

To add or edit a list of term group codes:

1. Navigate to **Lists** > **Student Accounts**. The Setup - Student Accounts Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Term group**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Click **Add**, or select a record and click **Edit**.



5. Select a **Default Billing Term**.
6. Click **Save**.

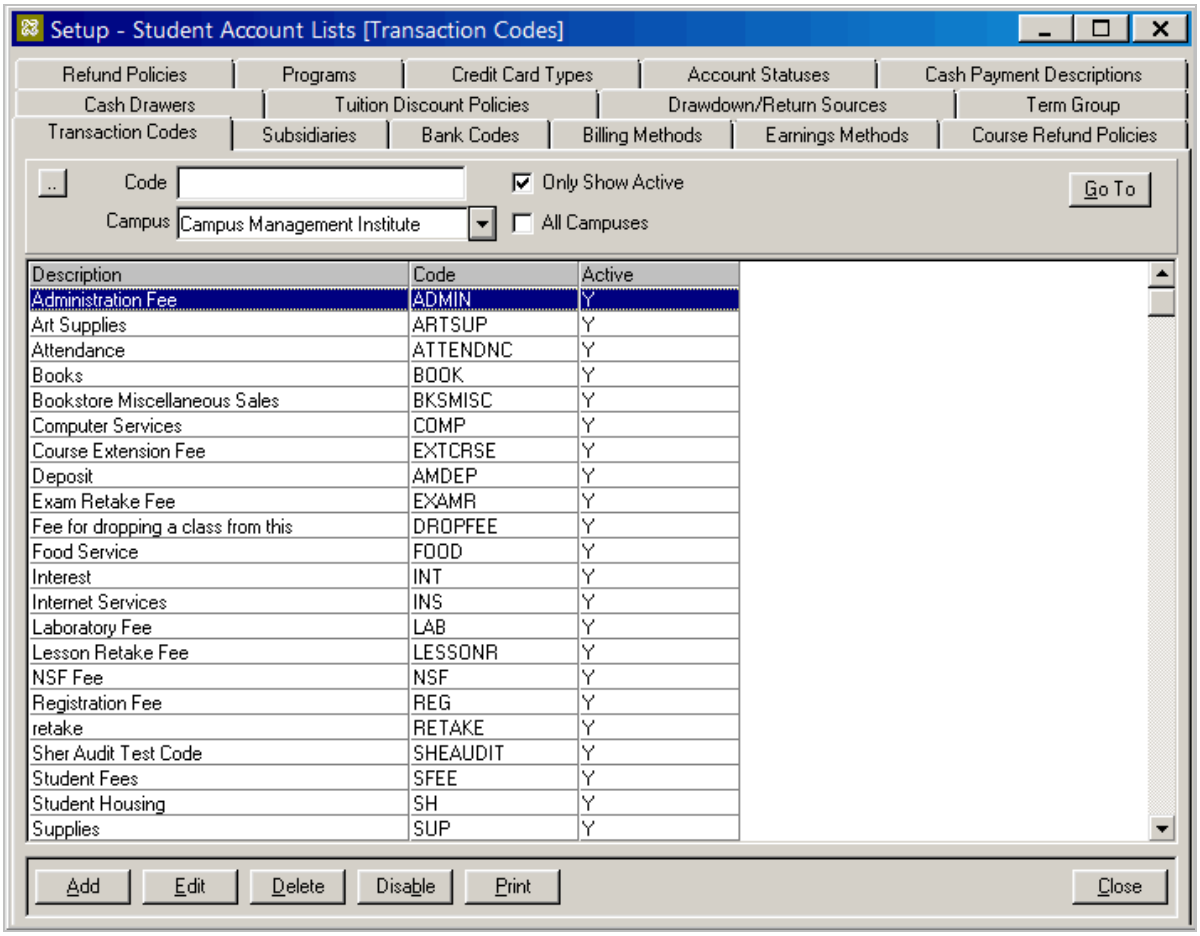
Setup - Student Account Lists [Transaction Codes]

The Transaction Codes list defines the transactions that affect the student ledger and the posting of related entries in the General Ledger. The following transaction codes are required by CampusNexus Student:

- BOOK = Books
- EXAMR = Exam Retake Fee
- EXTCRSE = Course Extension Fee
- EXTLSN = Lesson Extension Fee
- INT = Interest
- LESSONR = Lesson Retake Fee
- REG = Registration Fee
- TUIT = Tuition

To add or edit a transaction code:

1. Navigate to **Lists** > **Student Accounts**. The Setup - Student Accounts Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Transaction Codes**.

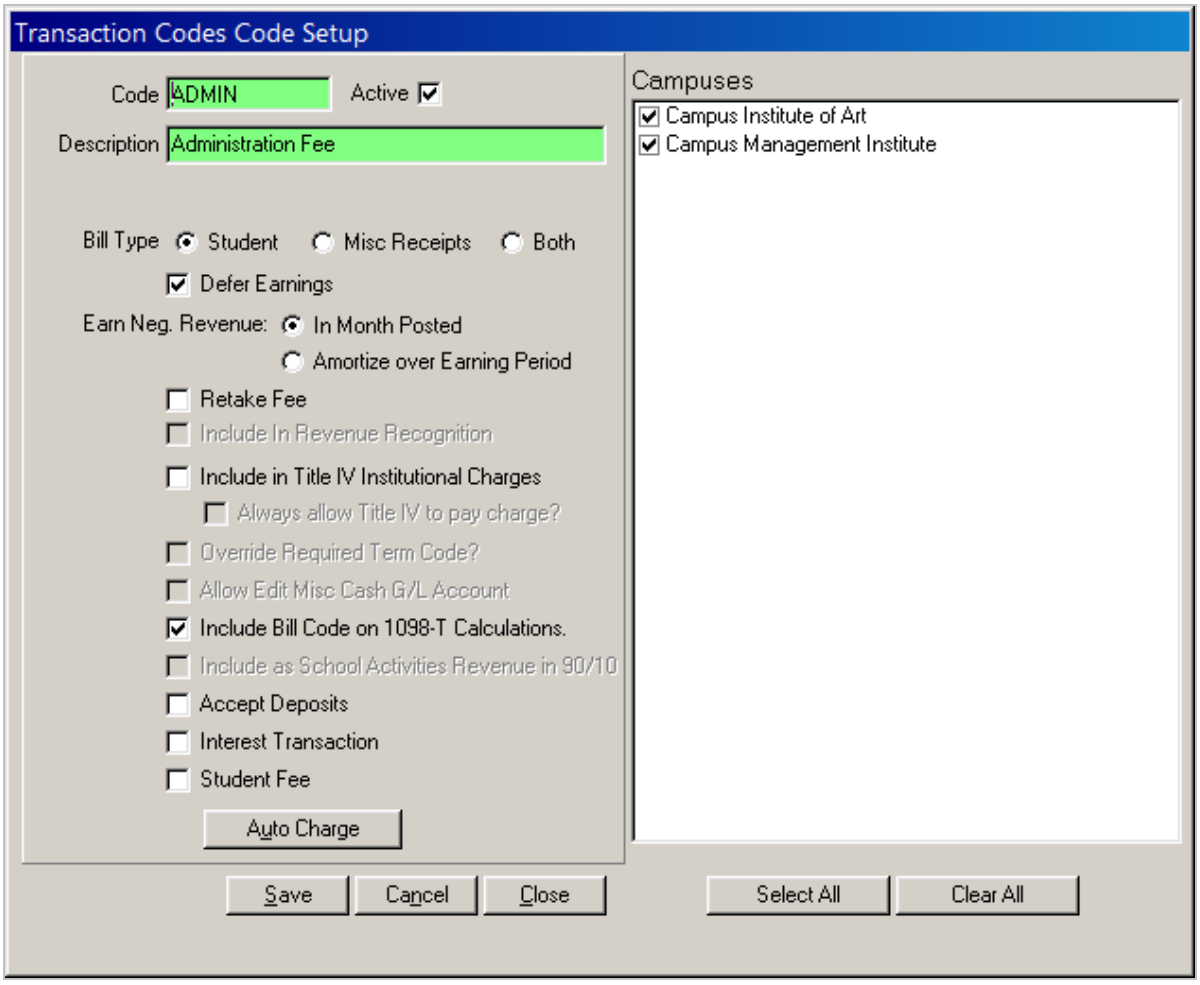


3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in

the text box and press **Enter** to view the corresponding record in the list.

4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
6. Click **Add**, or select a record and click **Edit**. The Transaction Codes Code Setup form is displayed.

   Note: If you receive the following message when editing a Transaction Code, *"This transaction code is being used as an Adjustment transaction code and cannot be edited at this time."*, navigate to **Lists** > **Student Accounts** > **Refund Policies** (tab) > **Transaction Codes** (button) and remove the Adjustment Code from its mapping to the Transaction Code.



   Note: The TUIT code must be used to bill tuition via Registration Billing. Unless an unbilled TUIT item appears in a student's Fees folder, the student is be gathered in the list of students to bill.

7. Specify appropriate options. See Field Descriptions - Transaction Codes Code Setup Form.
8. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Field Descriptions: Transaction Codes Code Setup Form

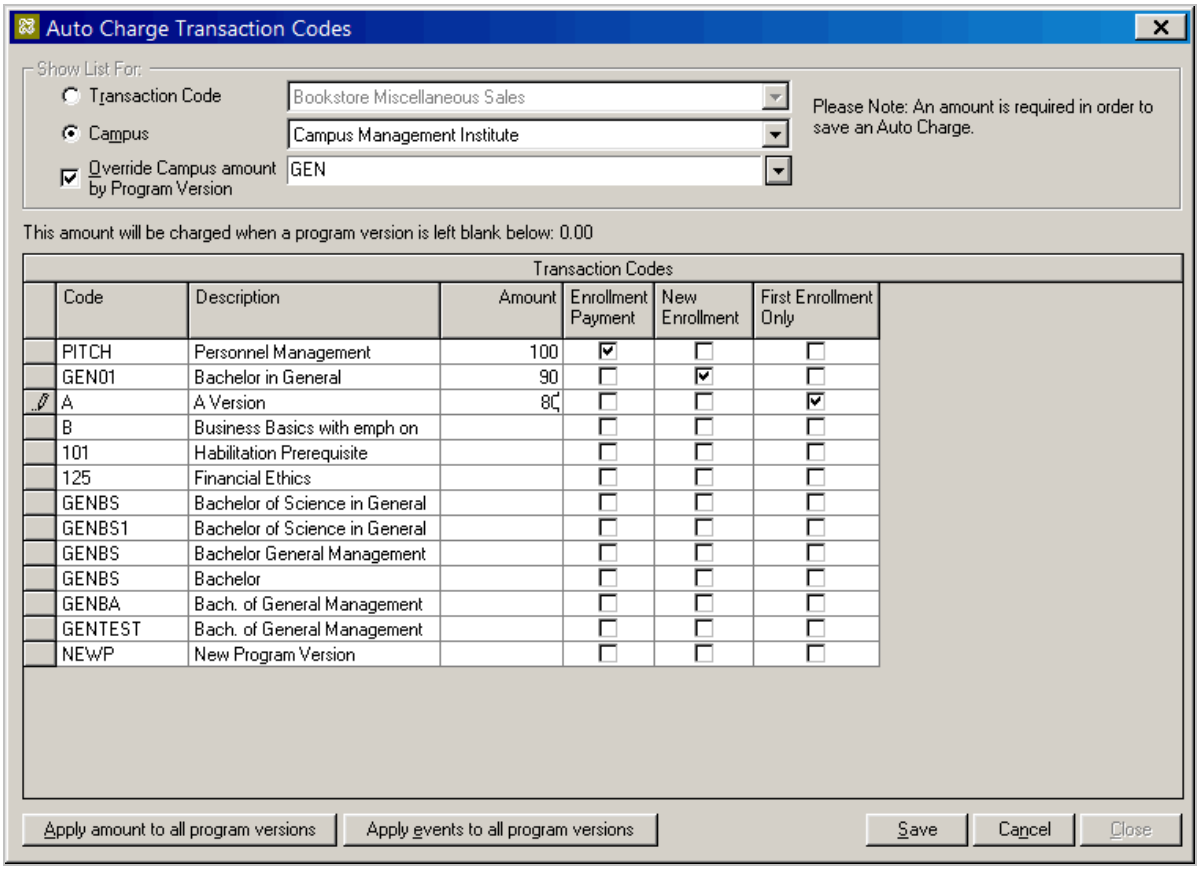
Field	Description
Code	Specify a unique **Code**.
Description	Enter a **Description**.
Active	Select or clear the **Active** check box to designate the record as active or inactive, respectively.
Campuses	Select one or more **Campuses**.
Bill Type	Indicate if the transaction applies to Students only, Miscellaneous Receipts only, or Both.
Defer Earnings	If this check box is selected, the procedures for deferring earnings apply to this type of transaction. For more information, see Earnings Methods, Revenue Recognition, and Student Accounts Programs.
Earn Neg. Revenue	Select in of the following methods for calculating negative deferred revenue: • **In Month Posted** - CampusNexus Student applies the entire amount in the month during which the transaction is posted. • **Amortize over Earning Period** - CampusNexus Student amortizes the transaction over the entire earning period (Program, Academic Year, Term, and so on). For more information, see Revenue Recognition.
Retake Fee	Select this option to mark a transaction code as a retake fee. Note that the Bill Type for Retake Fee can be set to Students only, Miscellaneous receipts only, or Both.
Include in Revenue Recognition	Select this option to include a transaction code in Revenue Recognition.
Include in Title IV Institutional Charges	Select this option if the charge is to be included in the Title IV refund institutional charges calculation. This option must be selected if this transaction code represents a charge to be evaluated.
Always allow Title IV to pay charge	Select this option for transaction codes such as tuition, fees, and room and board since the Title IV disbursement may be used by the institution without obtaining a waiver from the student or parent. Clear this option for transaction codes such as books/supplies since a waiver must be obtained before Title IV disbursements may be used to pay these types of charges.
Override Required Term Code?	Select this option to allow a transaction to be posted without a term code. This could include Registration fees and other transactions not tied to a term.
Allow Edit Misc Cash G /L Account	Select this option to enable the authorized user to specify a General Ledger account when posting miscellaneous cash receipts or override the G /L Account numbers for the transaction code. This option is disabled for Bill Type Student.

Field	Description
Include Bill Code on 1098-T calculations	Select this option if the code represents an activity that is an eligible 1098-T expense (e.g., tuition and books).
Include as School Activities Revenue in 90/10	Select this option to include income from eligible school activities in the 90/10 calculation. This feature is available only if the Bill Type is Misc Receipts or Both. This option is disabled for Bill Type Student. **Note**: In calculating revenues generated by school activities, an institution may include only revenue generated by the institution from activities it conducts, that are necessary for its students' education or training. The activities must be conducted on campus or at a facility under the control of the institution; performed under the supervision of a member of the institution's faculty; and required to be performed by all students in a specific educational program at the institution. Examples include beauty/barbering schools providing haircuts; culinary institutes operating restaurants, and trade schools providing equipment repairs. For more information on eligible activities, refer to https://ifap.ed.gov/ifap/.
Accept Deposits	Select this option to indicate that your institution will/cannot post charges to a subsidiary ledger using this transaction code. Subsidiary ledgers are used for student services that are handled outside the student's account balance. Examples of charges to a subsidiary ledger are housing, meal plans, parking, etc.
Student Fee	Dual (Connected) Enrollment Student Fee with Terms not shared Select this option to designate whether fees should be charged once based on the student's overall level of enrollment for the time frame being billed when term group billing is configured for Connected enrollments. For more information, see Billing Methods. This option is ONLY applicable for billing connected enrollments with Automated Registration Billing set up with a Term frequency.
Auto Charge	See Auto Charge Transaction Codes. The Auto Charge option is not available if the Bill Type is Misc. Receipts.

Auto Charge Transaction Codes

You can auto charge transactions by Transaction Code, Campus, or Program Version. When the student enrolls, the enrollment is subject to application and other fees. These fees are automatically charged to the student and become transactions recorded in the Student Ledger Card.

1. Click **Auto Charge** to automatically post a charge. The Auto Charge Transaction Codes form is displayed.



2. Specify appropriate options. See Field Descriptions - Transaction Codes Code Setup Form.
3. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Field Descriptions - Auto Charge Transaction Codes Form

Field	Description
Show List For	Select Transaction Code or Campus.
Transaction Code	If you selected to view the list by Transaction Code, select a Transaction Code.
Campus	If you selected to view the list by Campus, select a Campus.

Field	Description
Override Campus amount by Program Version	If you selected to view the list by Campus and you want the program version amount to override the campus amount of the transaction, select the Override Campus amount by Program Version check box. A list of program versions becomes available for selection. Select a program version from the list. CampusNexus Student provides the capability of automatically charging fees when different programs charge different Application Fees. The feature also allows users to set up Auto Charges based on Program and associated program version. When charging application fees to a student when enrolling, CampusNexus Student charges the program version amount if an application fee applies. When charging application fees to student ledger cards, users often have problems with incorrect amounts being charged. On some campuses, application fees do vary from program to program, and therefore the fees are dependent on the student's enrollment program. When the student enrolls, or is charged the application fee, the staff member may not always be aware of the current fee amounts. Automating the charges for application fees by program increases productivity and prevents data entry errors. You cannot select the following options to apply the auto charges to: • Student Payment • Require Housing • Return Check Fee CampusNexus Student auto charges amounts by student when the specified event occurs. • If an amount exists for program version, auto charge that amount. • If no amount exists for program version, use amount defined for campus if one exists. Notice the message: *"This amount will be charged when a program version is left blank below."* The amount represents the Campus amount assigned to the fee.
Student Payment	Select this option to configure an automatic charge to be generated when a student payment is made prior to enrollment. Only Student or Enrollment Payment may be selected (selecting one will clear the other).
Enrollment Payment	Select this option to configure an automatic charge to be generated when a student payment is made following enrollment. Only Student or Enrollment Payment may be selected (selecting one will clear the other).
New Enrollment	Select this option to configure an automatic charge to be generated when student enrollment is completed. New Enrollment can be selected in conjunction with Student or Enrollment Payment.
First Enrollment Only	Select this option to configure an automatic charge to be generated only once, during the student's first enrollment. Typically used for enrollment and application fees that are not charged again if a student enrolls in another program.
Require Housing	Select this option to configure an automatic charge to be generated for a housing deposit when housing is required for a student.

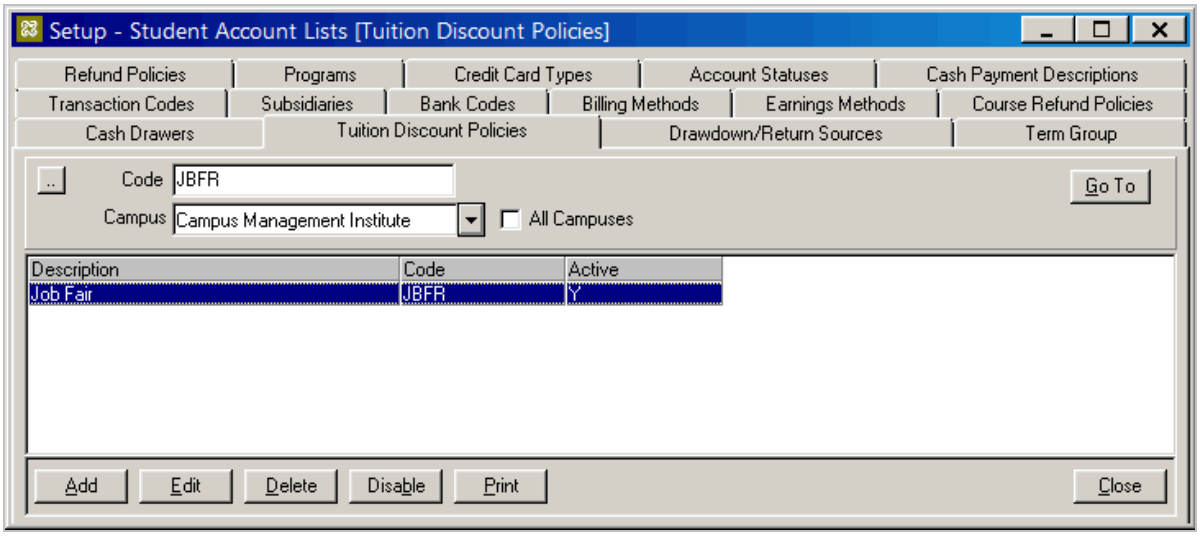
Field	Description
Returned Check Fee	Select this option to configure an automatic charge if a check for a student payment is returned by the bank for non-sufficient funds (NSF).
Apply amount to all program versions (button)	This button is enabled when 'Campus' and 'Override Campus amount by Program Version' are selected and an amount is specified for a program with multiple program versions. When you click the button, CampusNexus Student places the same amount in all subsequent program versions rows.
Apply events to all program versions (button)	This button is enabled when 'Campus' and 'Override Campus amount by Program Version' are selected and an amount is specified for a program with multiple program versions. When you select an event such as 'Enrollment Payment', 'New Enrollment', or 'First Enrollment Only' and then click the button, CampusNexus Student applies the event selection to all subsequent program versions rows.

Setup - Student Account Lists [Tuition Discount Policy]

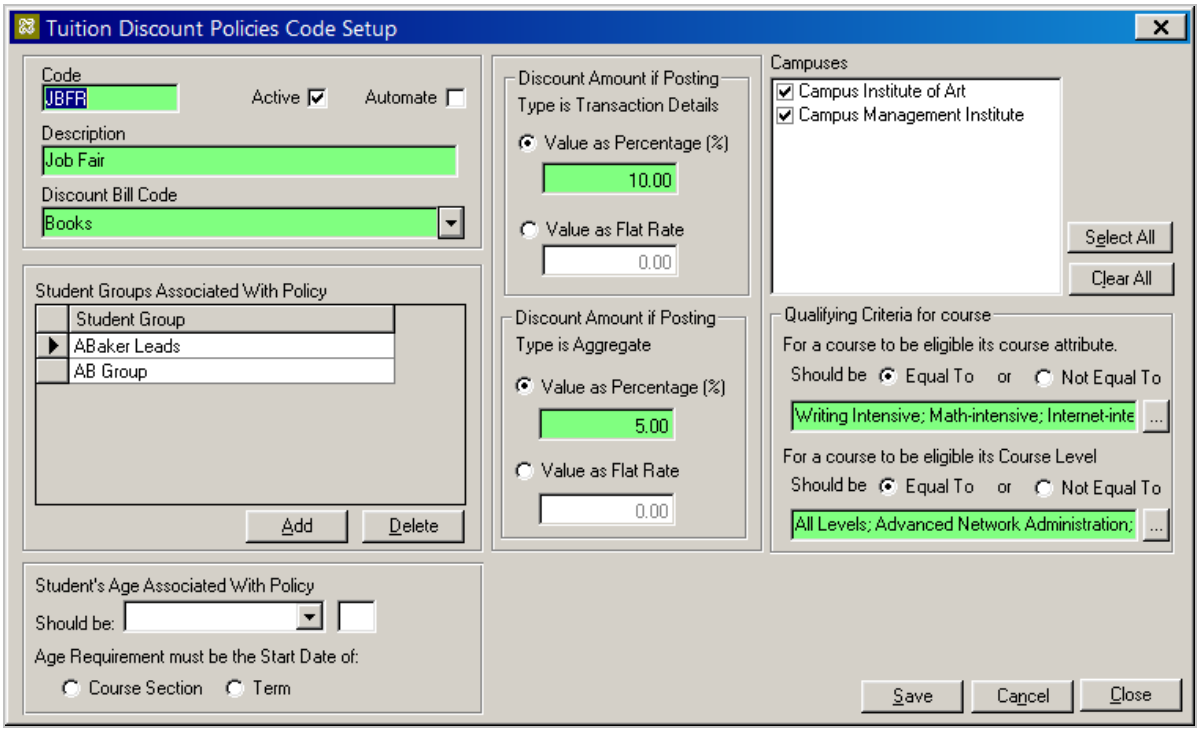
The Tuition Discount Policy list defines the policies used to apply a discount to the tuition rates for eligible students.

To add or edit a list of tuition discount policies codes:

1. Navigate to **Lists** > **Student Accounts**. The Setup - Student Accounts Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Tuition Discount Policy**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
6. Click **Add**, or select a record and click **Edit**. The Tuition Discount Policy Code Setup form is displayed.



7. Specify appropriate options. See Field Descriptions.

   Note: It is not recommended to change discount percentages or flat rates on a Tuition Discount Policy once discounts have been posted for a given policy.

8. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

   The following occurs when you click Save:

   - If the tuition discount policy is automated and the campus selected has not been configured for the tuition discount posting order, a message is displayed advising you to configure the posting order; if it is more than one campus, a list of the campuses not configured for the discount posting order is displayed. To configure the Posting Order, see Campus Accounting.
   - If you do not configure a posting order found for the campus, the automated tuition discount policy will not calculate a discount for the policy that is set up.

Field Descriptions

Field	Description
Code	Specify a unique **Code**.
Description	Enter a **Description**.
Active	Select or clear the **Active** check box to designate the record as active or inactive, respectively.

Field	Description
Automate	Select this check box to automate the tuition discount with a posting order and calculate the discount up to 100% of the course charge. When automated, the pending tuition discount transactions are posted to the student's Ledger Card automatically when TUIT charges are posted. Otherwise, the pending tuition discount transactions is deleted when TUIT charges are posted. Tuition discounts then have to be processed manually through View > Student Accounts > Tuition Discounts or through Daily > Student Accounts > Process Tuition Discounts. The manual tuition discount process also allows you to use the tuition discount posting order and to calculate the discount up to 100% of the course charge. If pending charges exists for the student, CampusNexus Student checks if any pending discounts are available, and if so, displays them on the Ledger Card, Ledger Card Report, Registration Bill Summary, and Registration Bill Details.
Discount Bill Code	Select a bill code for the tuition discount policy. **Notes**: • Different tuition discount policies should not share the same tuition discounts bill code. • The TUIT transaction code does not appear in the list because the tuition discount should not be posted against the same bill code to which it was charged.
Student Groups Associated With Policy	To associate a student group with the new tuition discount policy, click **Add**. This adds a row in the Student Group list. Click in the new row and select the student group to associate with the policy. **Note**: Different tuition discount policies should not share the same student group. If a student is eligible for multiple tuition discount policies, add the student to the appropriate student groups that are associated with those tuition discount policies.
Student's Age Associated With Policy	Use the 'Should be' field to define the age criteria for the Tuition Discount Policy. Select one of the following values: • Equal To • Greater Than • Greater Than Or Equal To • Less Than • Less Than Or Equal To • Between **Notes**: • If Between is used, the 'and' label and a second age box are displayed. If you use this value, make sure the second text box age number is greater than the first. • All age boxes must have numeric values. Select Course Section or Term for the 'Age requirement must be the Start Date of:' option.

Field	Description
Discount Amount if Posting Type is Transaction Details / Discount Amount if Posting Type is Aggregate	Specify the amount of tuition charge to be discounted for each course as a percentage in the Value as Percentage (%) field or as a flat rate in the Value as Flat Rate field. The Value as Percentage (%) field allows two decimal places. Specify this discount under 'Discount Amount if Posting Type is Transaction Details' (see also Post Transaction Details) or under ' Discount Amount if Posting Type is Aggregate' based on the billing method selected for the tuition discount policy. **Note**: It is not recommended to change discount percentages or flat rates on a Tuition Discount Policy once discounts have been posted for a given policy.
Campuses	Select one or more **Campuses**.
Qualifying Criteria for course	Select the criteria that a course must meet to qualify for the tuition discount. The qualifying criteria available are Course Attribute and Course Level. Select 'Equal To' or 'Not Equal To' and select the course attribute and level that a course's should be equal to or not equal to in order to be eligible for the tuition discount policy. Click to select multiple attributes or levels.

Lists > Academic Records

When you navigate to Lists > Academic Records, the **Setup - Academic Records Lists** form is displayed. From this form, you can add, edit, delete, enable, disable, copy, and print Academic Records lists using the following tabs:

- Areas of Study
- Buildings/Rooms
- Calendar
- Catalog (This tab appears only if Enable Catalog is selected on the Campus Information - Academic Records tab).
- Course Attributes
- Course Categories
- Course Groups
- Course Levels
- Course Reason
- Course Type
- Courses
- Degree
- Delivery Methods
- Enrollment Status
- GPA
- Grade Level
- Grade Level Promotion Rules
- Grade Scale
- Honors
- Instructor Attributes
- Lesson Types
- Period
- Program Group
- Programs (Also see Program Versions and CIP Code.)
- Reasons
- Registration Groups
- Requirement Rules
- Resources
- SAP
- Start Date
- SAP Reason
- SAP Status
- Shifts
- Term
- Term Groups

See Maintaining Lists for instructions on adding, editing, deleting, disabling, enabling, and printing lists.

Setup - Academic Records Lists [Areas of Study]

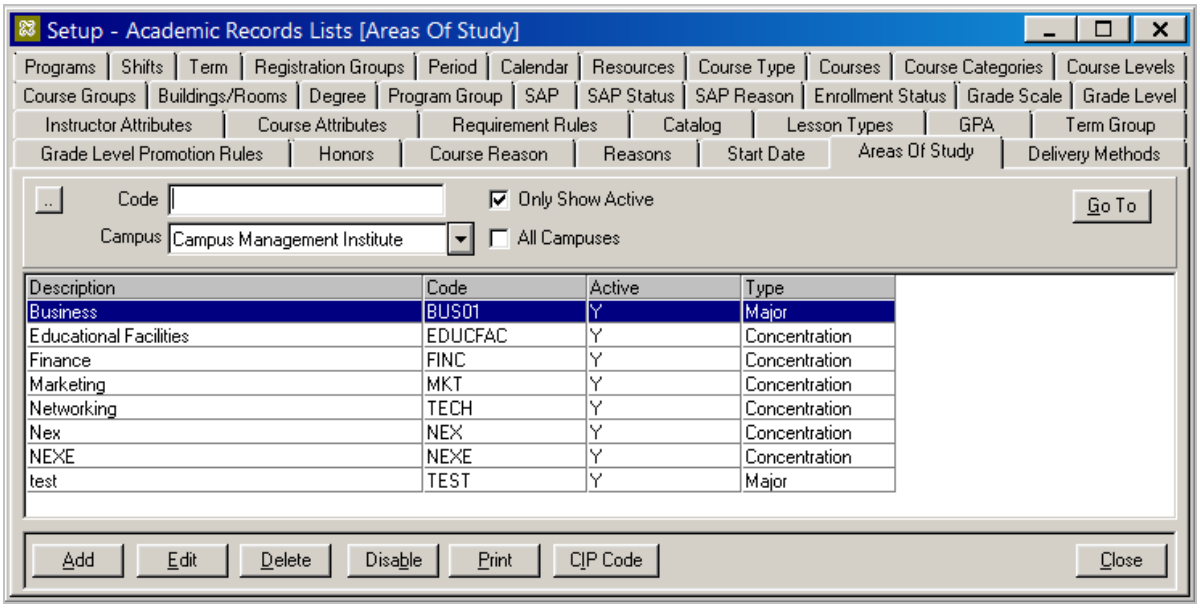
Use the Setup - Academic Records Lists [Areas of Study] form to define areas of study for your institution. The attributes of an area of study include code, description, type (major, minor, or concentration), CIP code, and campus association. You can also select requirement rules and create a course list. The selected courses must comply with the minimum GPA and the number of required credits defined for the area of study.

An area of study is selected as part of a student's enrollment. The area of study can be added to the enrollment through the Enrollment Wizard under View > Admissions > Enroll Student. The area of study can also be declared post enrollment by editing the Enrollment Information tab under View > Academic Records > Enrollment .

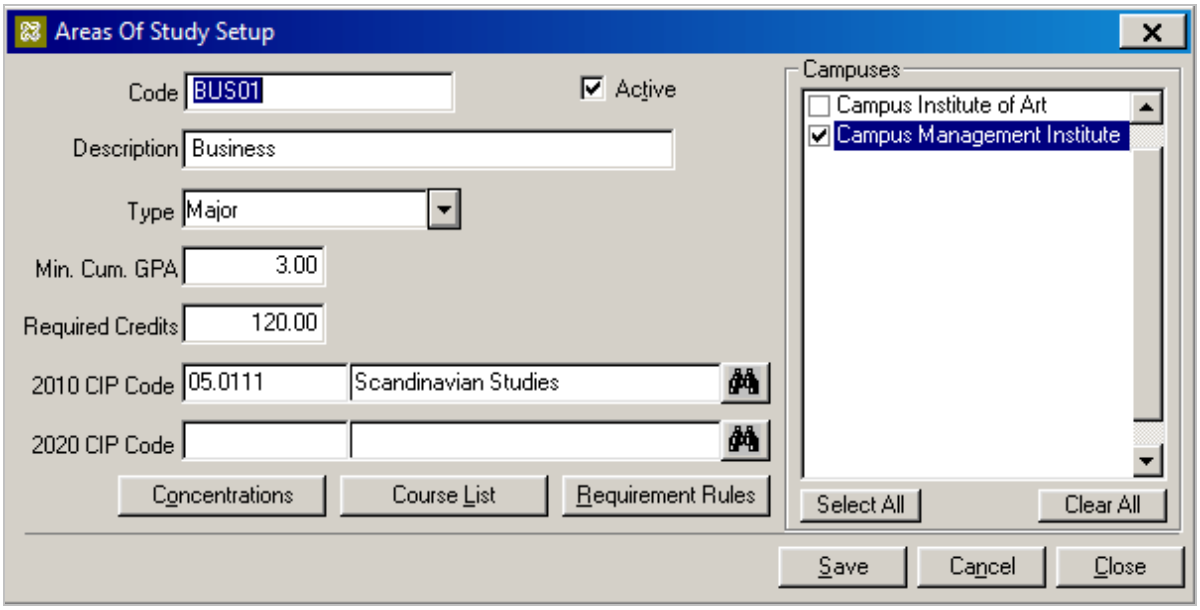
Areas of study are assigned to specific Program Versions under Lists > Academic Records > Programs > Versions. For more information, see Program Versions and Areas of Study.

To add or edit a list of areas of study codes:

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Areas of Study**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Areas Of Study Setup form is displayed.



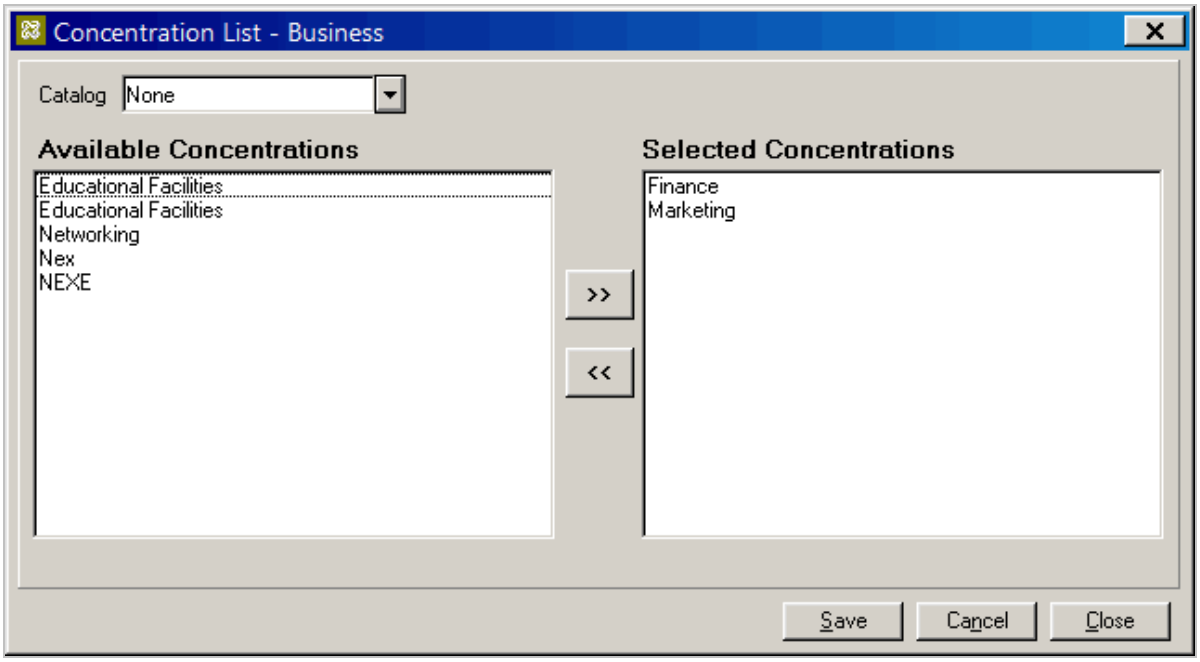
7. Specify appropriate options. See Field Descriptions.

Field Descriptions

Field	Description	
Code	Specify a Code of up to eight characters.	
Active	Select or clear the Active check box to designate the record as active or inactive.	
Description	Enter an appropriate description.	
Type	Select one of the following options: • Concentration • Major • Minor	
Min. Cum. GPA	Specify the minimum cumulative grade point average needed for this Area of Study.	**Note**: The Min. Cum. GPA and Required Credits values are used to create a relationship between the degree, core courses, and grades required to attain the degree. CampusNexus Student checks continually to ensure that students meet their degree requirements.
Required Credits	Specify the number of credits required for this area of study.	
Campuses	Select the campuses where this area of study is available.	
2010 CIP Code	Click to search for a 2010 Classification of Instructional Program (CIP) code to be associated with the area of study. For more information, see Associate CIP Code with Area of Study or Program.	
2020 CIP Code	Click to search for a 2020 Classification of Instructional Program (CIP) code to be associated with the area of study. For more information, see Associate CIP Code with Area of Study or Program.	

8. The Concentrations button is enabled when Major is selected in the Type field.

    a. Click the **Concentrations** button to add previously defined Concentrations to the Major. The Concentration List form is displayed.

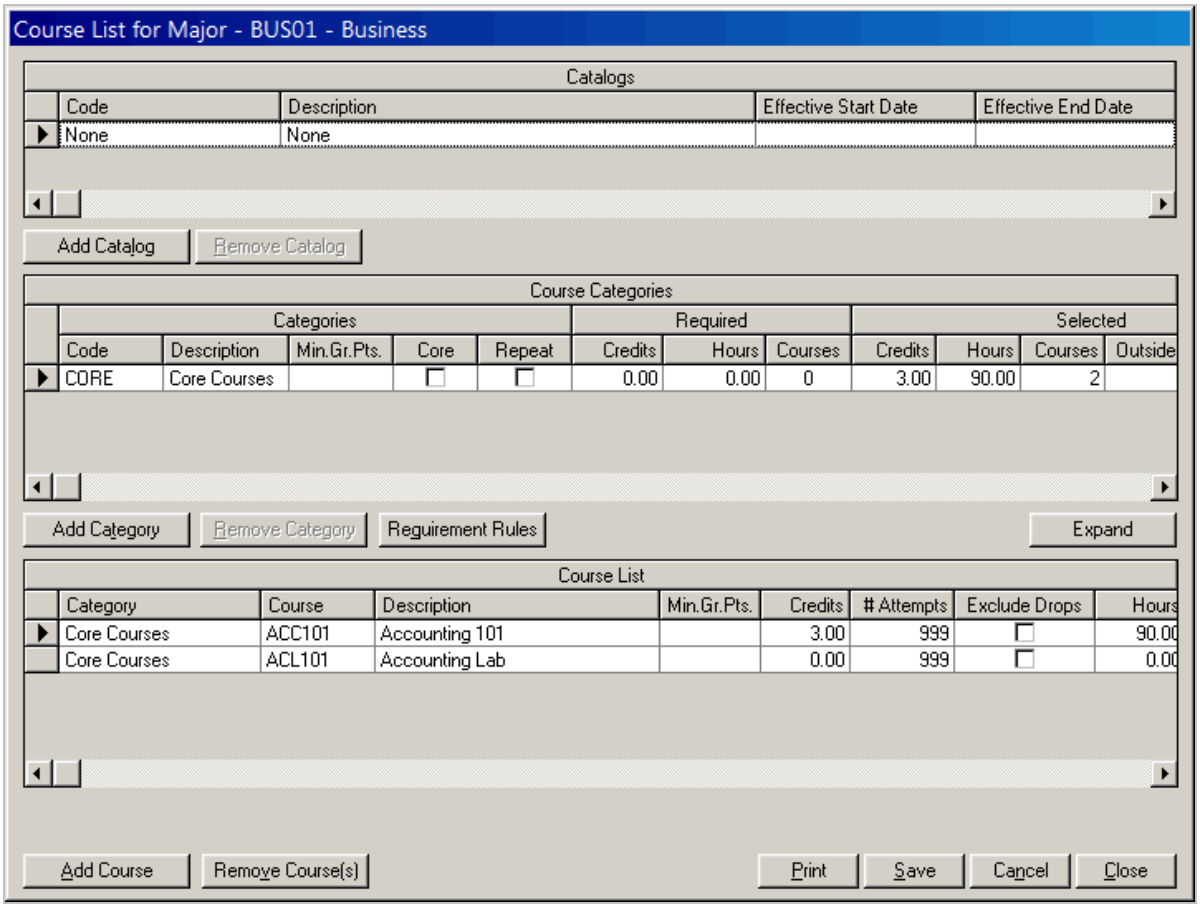


    b. Select an item from the **Available Concentrations** list and click >> to create a list of Selected Concentrations. (Click << to remove a selected item from the Selected Concentrations list.)

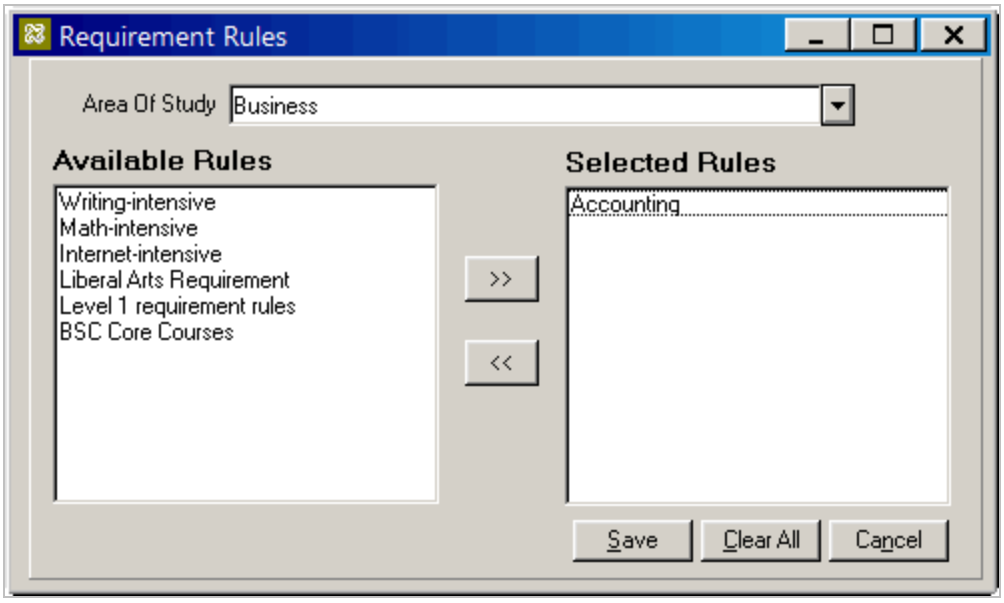
    c. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. You care returned to the Setup - Academic Records Lists [Areas of Study] form.

9. Click the **Course List** button to build a list of courses required for the area of study. The Course List for Major form is displayed.

    This form is similar to the one used to build a course list for a Program Version. For more information, see Course List.



10. Click the **Requirement Rules** button to select requirement rules for the area of study. The Requirement Rules form is displayed.



Note: Rules are created on the Setup - Academic Records Lists [Requirement Rules] form. For supplemental information, refer to:

- Assign Rules to Course Category
- Assign Rules to Program
- Add an Elective to the Program Version Course List

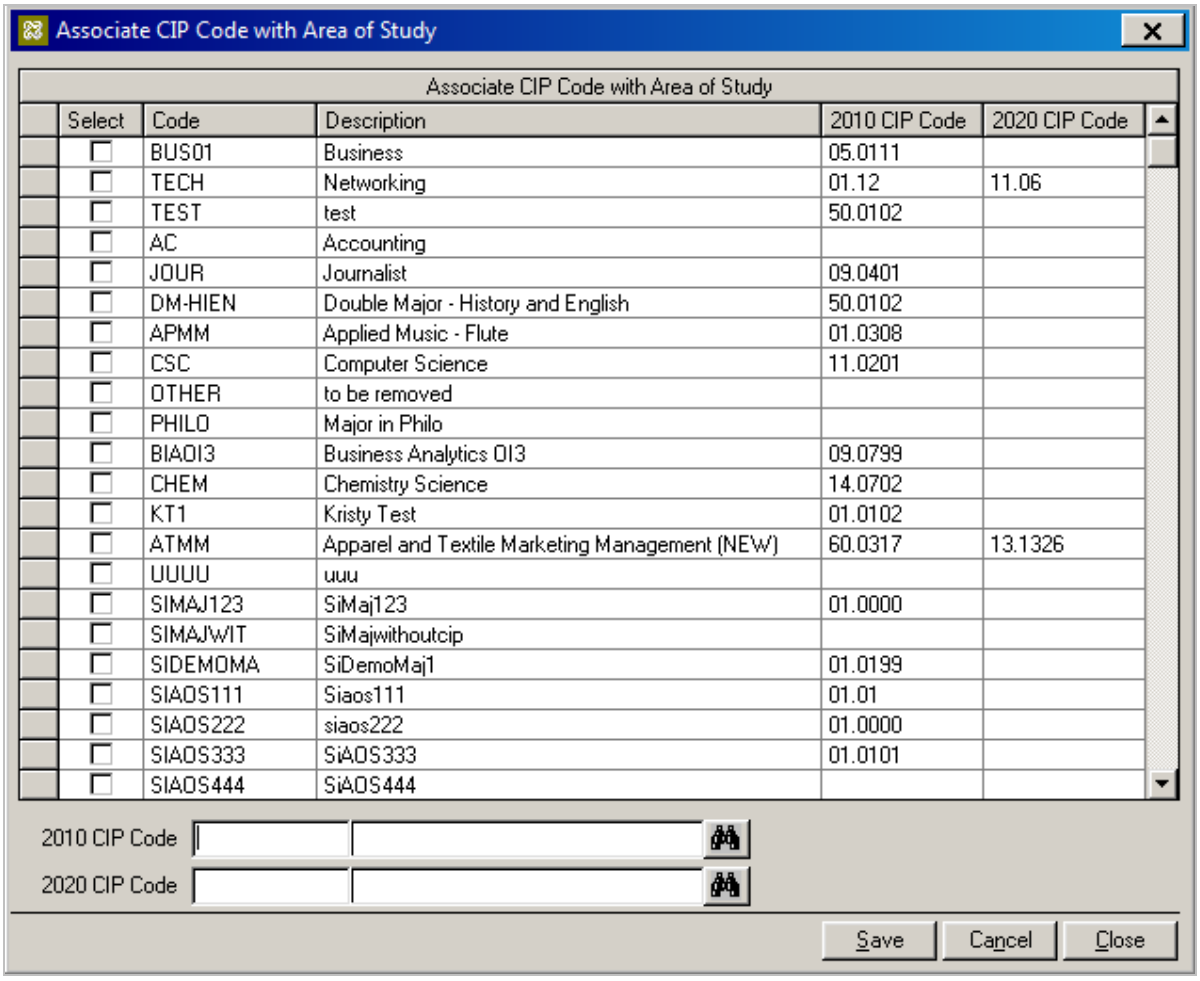
11. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Associate CIP Code with Area of Study or Program

Institutions must report Classification of Instructional Program (CIP) codes to COD and NSLDS. These codes are defined by the National Center for Education Statistics (NCES), and until the HERA regulation, were used primarily for IPEDS reporting. Institutions may select the CIP codes, associate them with areas of study or programs, and subsequently export them to COD.

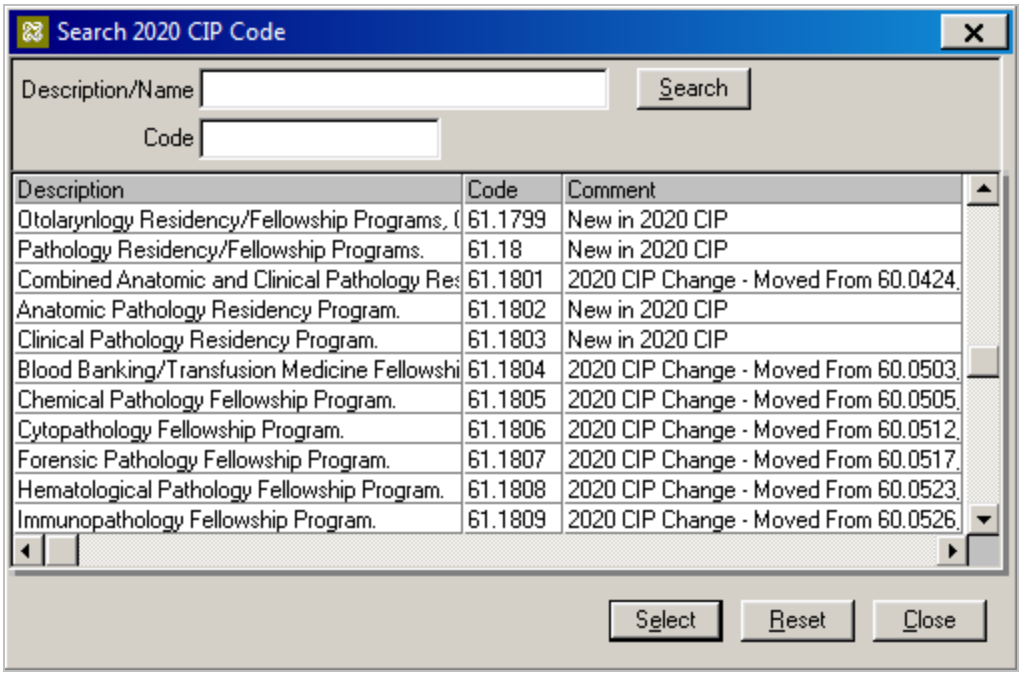
To associate a CIP code with an area of study or program:

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the **Areas Of Study** tab to associate a CIP code with an area of study.
   - OR -
   Select the **Program** tab to associate a CIP code with a program.
3. Click **CIP Code**. The Associate CIP Code with Area of Study or Associate CIP Code with Program form is displayed.



4. Select the **Select** check box for Code and Description that you would like to associate with the CIP code.
5. To search for a CIP code, click next to the **2010 CIP Code** or **2020 CIP Code** text box. The Search 2010 CIP Code form or Search 2020 CIP Code form is displayed.

Note that the Comment column in the Search 2020 CIP Code form indicates whether a CIP code is new, changed, or moved.



a. Specify the **Description/Name** of the CIP code or click the **Search** button

b. Select the applicable **Description** and **Code**.

c. Click the **Select** button to select the CIP code, or select the **Reset** button clear the list of CIP codes so that you can select the Search button again.

d. Click the **Close** button.

The selected CIP Code/Description is inserted into CIP Code/Description fields of the form where the CIP code search was initiated.

6. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Academic Records Lists [Buildings/Rooms]

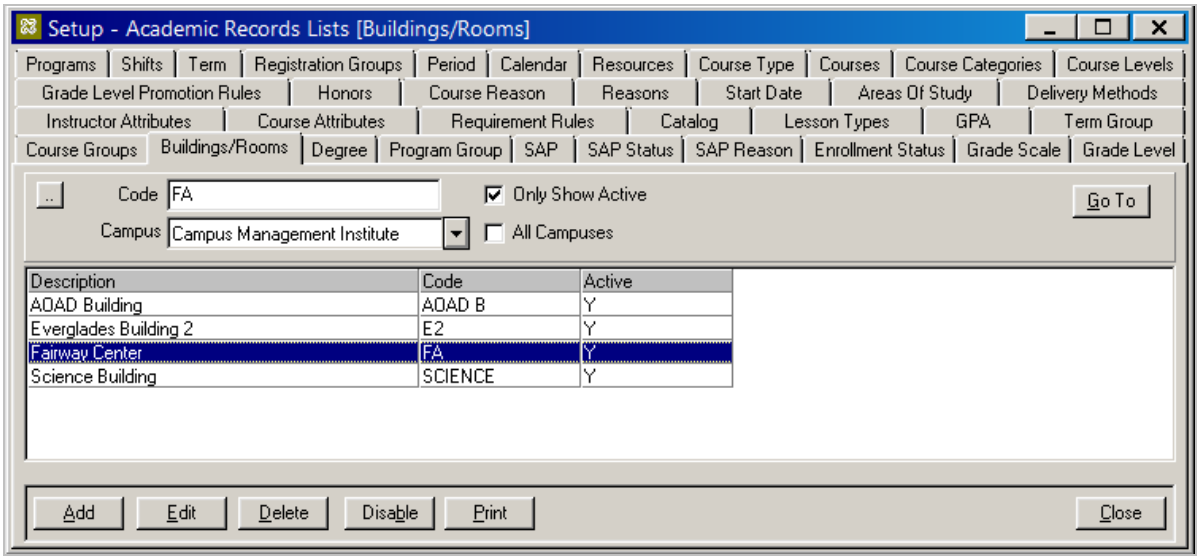
Use the Setup - Academic Records Lists [Buildings/Rooms] form to provide basic information about each building and classroom. Rooms are associated with a building and buildings are associated with a campus. Rooms can be associated with resources such as computers, projectors, and so on.

Prerequisite: Resource codes must be set up under Lists > Academic Records > Resources before they can be assigned to a room.

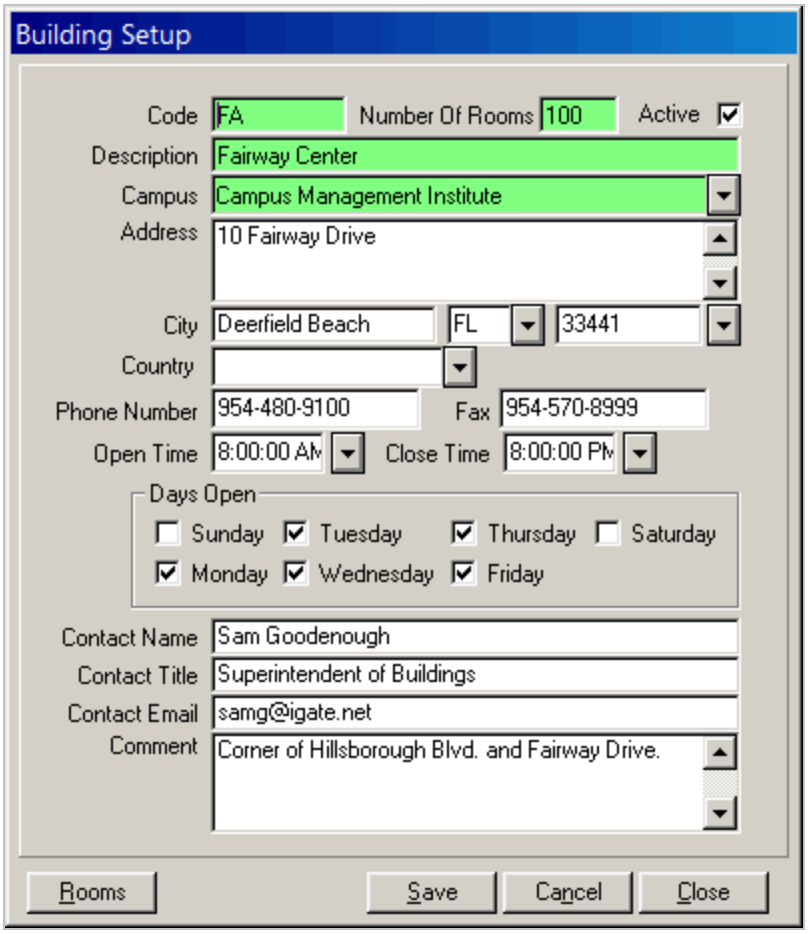
Note: You cannot delete a building if class sections are scheduled in it.

To add or edit a list of buildings/rooms codes:

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Buildings/Rooms**.

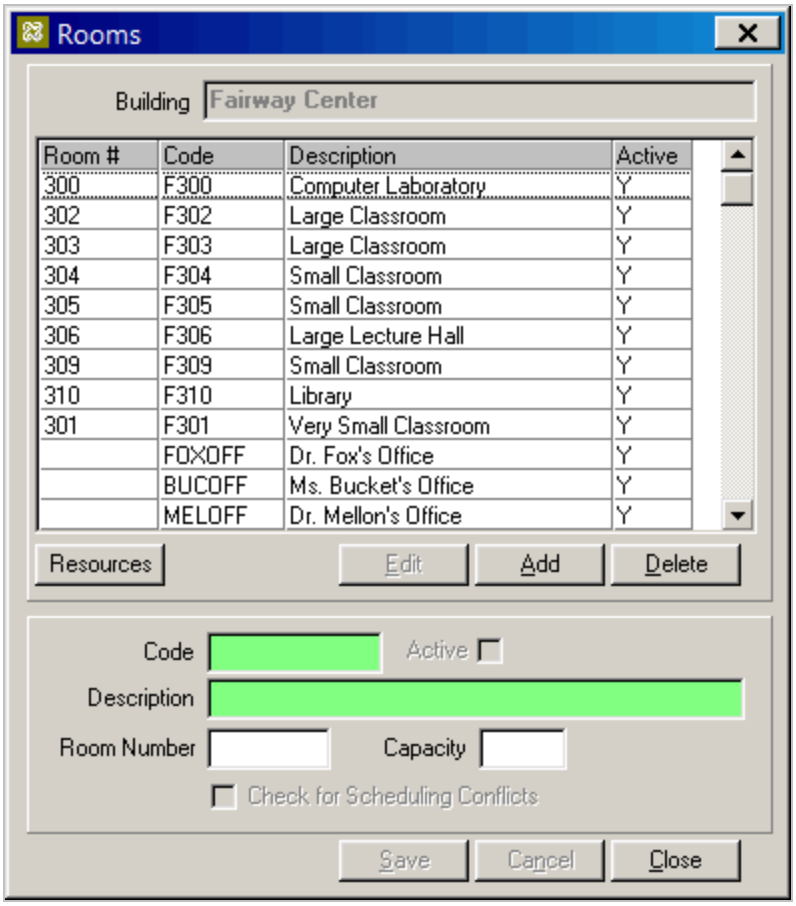


3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Building Setup form is displayed.

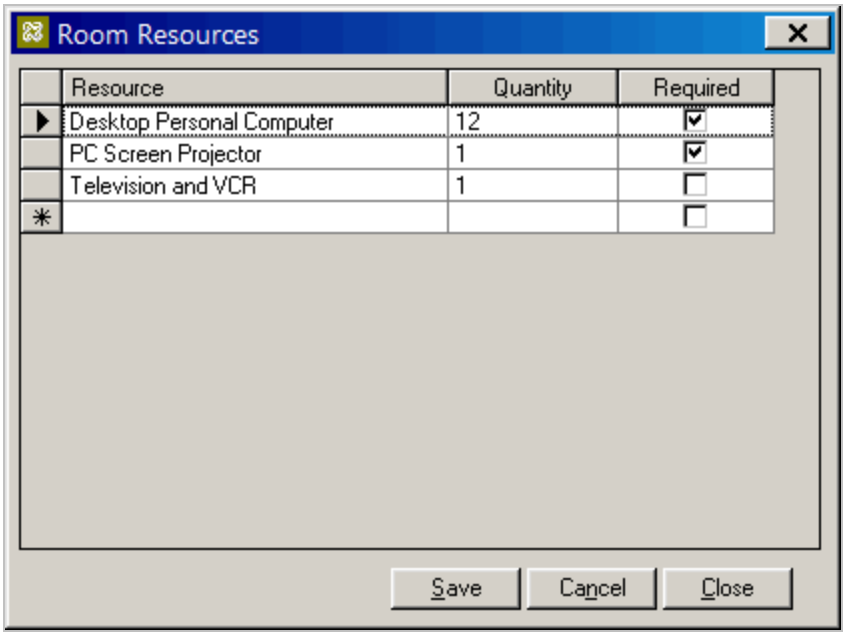


7. Specify a unique **Code**.
8. Specify the **Number of Rooms** (class rooms, labs, and so on).
9. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
10. Enter a **Description**.
11. Select the **Campus** at which the building is located.
12. Specify the address, telephone, and fax information.
13. Specify the hours and days of the week the building is available for classes.
14. Specify the contact information of the person who deals with building-related issues on a daily basis.
15. Enter any comments in the **Comment** field.
16. Click **Save**.

    Note: Save a new building record before attempting to add rooms to it.
17. To add or edit rooms in this building, click **Rooms**. The Rooms form is displayed.



18. Click **Add**, or select a record and click **Edit**.
19. Specify a unique **Code**.
20. Enter a **Description**. Include the room code and/or building in the description if several rooms may have the same description. In some cases, the room description instead of the room code is displayed on reports or option lists.
21. Specify a **Room Number**.
22. In the **Capacity** field specify the number of students that can be seated in the room.
23. Select or clear the **Check for Scheduling Conflicts** box. This check box indicates whether conflict checking should be enabled for the selected room. Clear this box to disable conflict checking for this room.
24. Click **Save**.
25. Click the **Resources** button to specify a list of resources provided in the room. The Room Resources form is displayed.



26. Click in a blank **Resource** field and click to select a resource from the previously established list of resources (see Lists > Academic Records > Resources).
27. In the **Quantity** field, specify the number of resource units.
28. Select or clear the **Required** check box to indicate that the resource is required in this room.
29. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. You are returned to the Rooms form.
30. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. You are returned to the Building Setup form.
31. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. You are returned to the Setup - Academic Records List [Buildings/Rooms] form.

Setup - Academic Records Lists [Calendar]

Use the Setup - Academic Records List [Calendar] form to set up your institution's calendar of holidays and other non-attendance days that are important in the posting of attendance. Each record can be related to a specific campus or all campuses. It is not necessary to enter weekend dates, unless you normally schedule classes on weekends. It is also not necessary to enter dates between the end of one term and the beginning of the next term.

If a non-attendance day is added, edited, or deleted, the class schedules are updated to add, change, or remove the holiday status (H) from the class attendance days (see Add/Drop Dates of Existing Course Sections). Class schedules are also updated if the campus selection is changed from one campus to another or from all campuses to a specific campus.

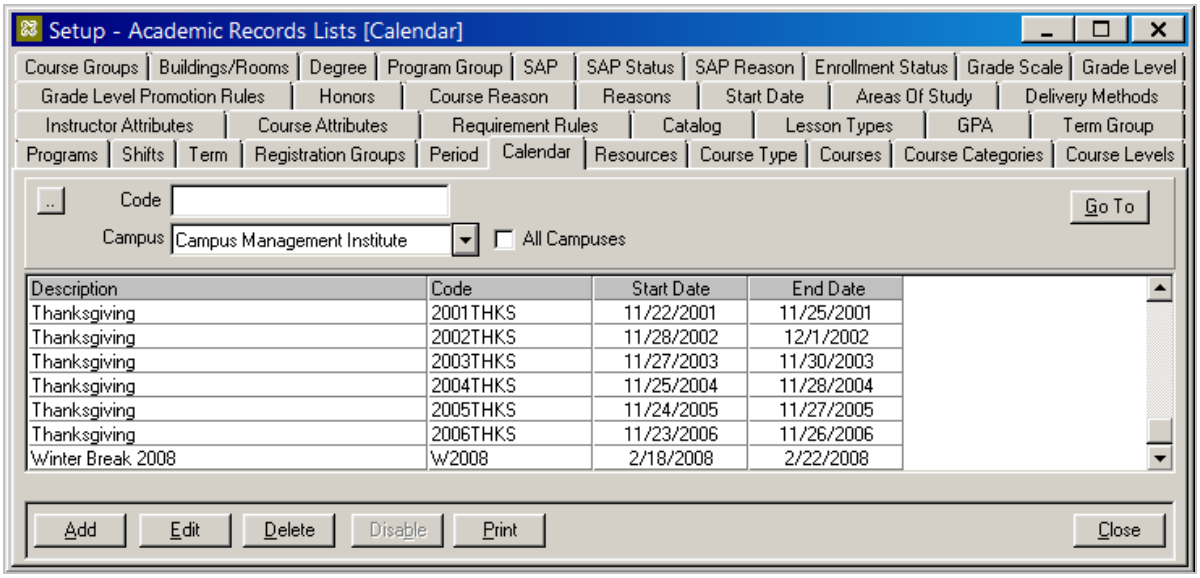
The process for saving campuses to a holiday period validates that the campuses selected are not already in a similar holiday period. The campus code, holiday codes, and date range for the holiday period are displayed in a warning message. Check the returned holiday code to make sure the campuses selected are not already in that holiday period.

Note: Avoid conflicting and overlapping holidays. If yours is a multi-campus institution with different holidays for different campuses, do not use the All Campuses option. Set up each holiday for each campus.

An example of what not to do: ABC institution has three campuses, A, B, and C. Two campuses have a full week off at Thanksgiving and the third campus allows only Thursday and Friday off. To save some data entry, the system administrator sets up Monday through Friday of Thanksgiving week as the holiday period for ALL institutions. The system administrator then sets up the third campus-specific (C) holiday period as Thursday through Friday of Thanksgiving week. When attendance is posted, and in other calculations, CampusNexus Student considers campus C as having the same five days off as campuses A and B because Monday through Wednesday are covered under the ALL holiday entry.

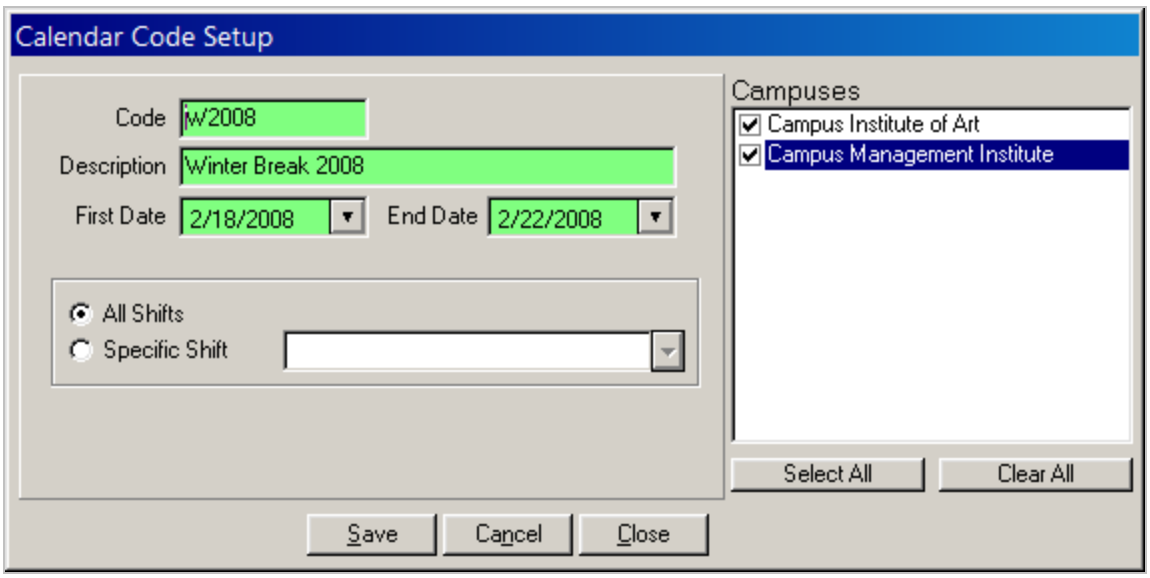
To add or edit a list of non-attendance days (calendar codes):

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Calendar**. A list of holidays is displayed. By default the list is sorted in descending order by the End Date. Change the sort order by clicking the column headers.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.

4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Click **Add**, or select a record and click **Edit**. The Calendar Code Setup form is displayed.

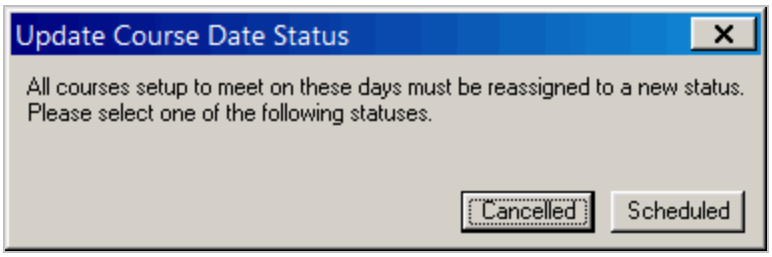


6. Specify a unique **Code**.

   Always use unique codes. Adding or editing holiday periods with the same codes can lead you to add campuses that already exist on another holiday period with the same code. If a warning message states the holiday period and campus is duplicated, check the holiday period and adjust as needed or re-evaluate the current holiday period.
7. Enter a **Description**.
8. Specify the **First Date** and **End Date** for the holiday period.
9. Select **All Shifts** or **Specific Shift**. If you select Specific Shift, choose a shift from the list.
10. Select one or more **Campuses**.
11. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

To delete a non-attendance day:

1. On the Setup - Academic Records Lists [Calendar] form, select the calendar record and click **Delete**.
2. A message is displayed indicating that all courses set up to meet on the scheduled date must be reassigned to a new status. Depending on the status you want to assign to the courses, click **Cancelled** or **Scheduled**.



Add/Drop Dates of Existing Course Sections

In the following situations, a message is displayed indicating that any addition, modification, or deletion of a calendar entry may affect the add/drop date of existing course sections. Decide if you want CampusNexus Student to recalculate and update the add/drop date of any affected course sections.

- A calendar entry is added or edited. Based on the date range of the calendar entry, it may affect the add/drop date of at least one existing course section that is using the Add/Drop Flag configured as Course Section Enforced.
- A calendar entry is deleted. Based on the date range of the calendar entry, it may affect the add/drop date of at least one existing course section that is using the Add/Drop Flag configured as Course Section Enforced.

You have the option to have the system recalculate and update the add/drop date of any affect course section. Only add/drop dates that were calculated by the system are recalculated/updated. Add/Drop dates that were manually entered are not recalculated/updated.

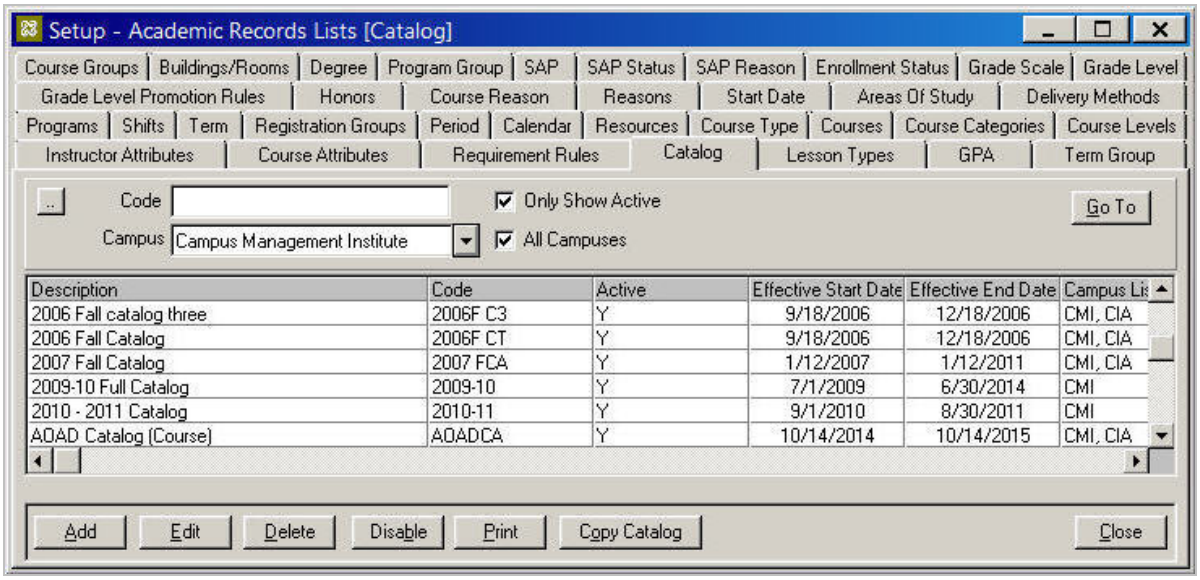
Setup - Academic Records Lists [Catalog]

Courses can be associated with the program versions catalog for a campus so that institutions can track which courses are required for a program in a given catalog. By default, students are assigned to the catalog that is active when they start a program. Students may choose between any of the catalogs that were published during the time they attended the institution. By changing to a different catalog, students can meet the requirements outlined for their program in the catalog. The catalog settings can be assigned to Program Versions and Areas of Study.

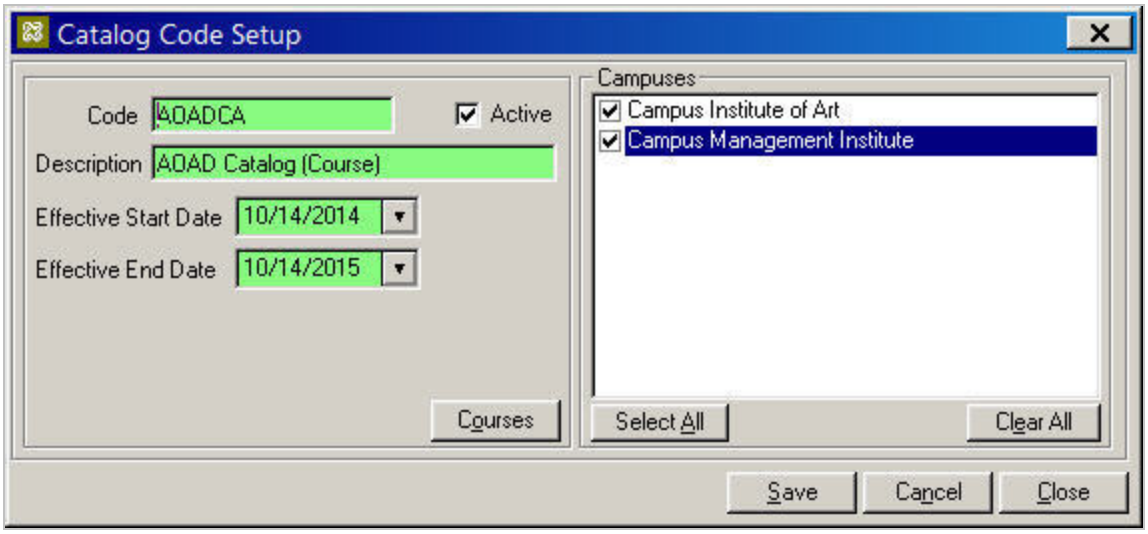
Note: The Setup - Academic Records Lists form contains a Catalog tab only when the catalog is enabled for the campus (see Enable Catalog on the Setup > Campus Information - Academic Records tab).

To add or edit a list of catalog codes:

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Catalog**.

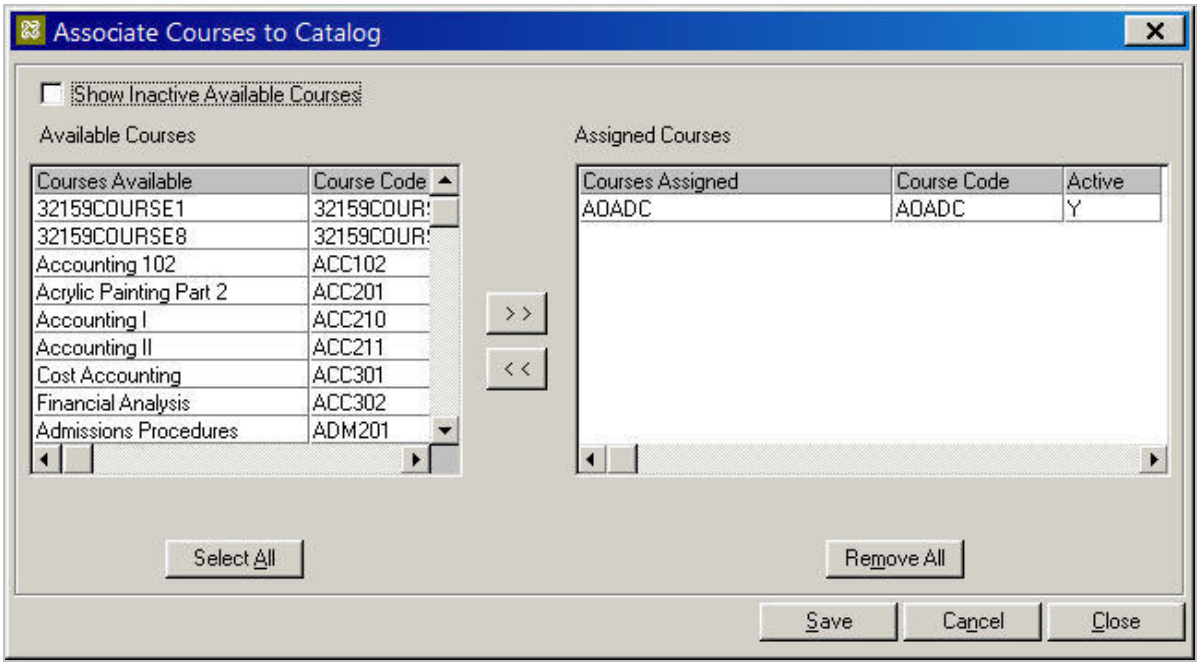


3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Catalog Code Setup form is displayed.



7. Specify a unique **Code**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Enter a **Description**.
10. Select one or more **Campuses**.
11. Select the **Effective Start Date** for the catalog.
12. Select the **Effective End Date** for the catalog.

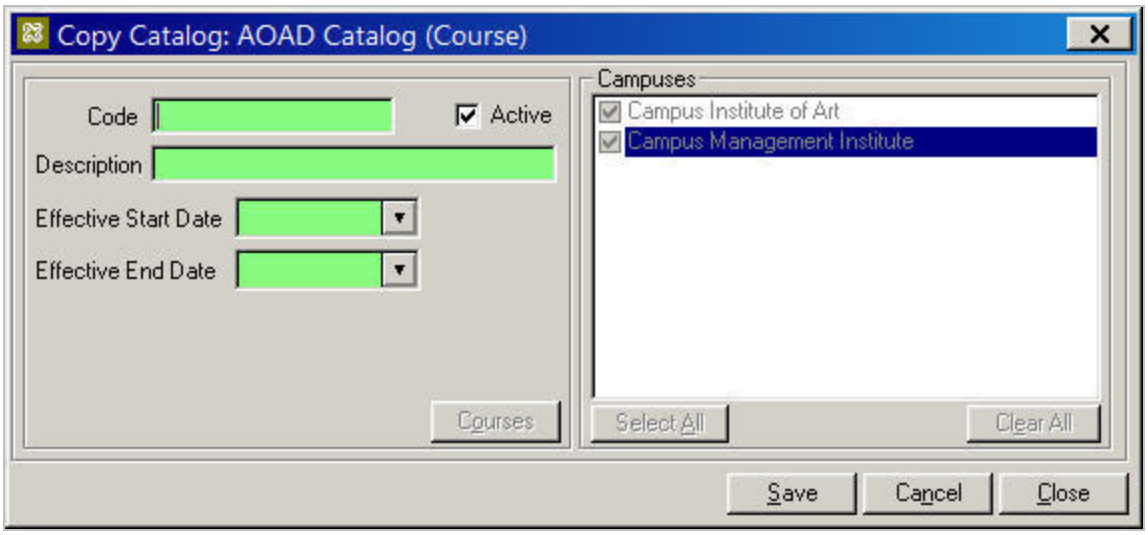
    Note: The Courses button remains disabled until all required fields have been entered and saved.
13. Click **Save**.
14. Click **Courses** to select the Courses associated with the Catalog. The Associate Courses to Catalog form is displayed.



15. By default only active courses are listed. To view inactive courses in the list of Available Courses, select **Show Inactive Available Courses**.
16. Select specific courses in the Available Courses list, or click **Select All**.
17. Click >> to assign the selected courses to the catalog. Click << to remove selected courses from the list of Assigned Courses, or click **Remove All**.
18. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

To copy a catalog:

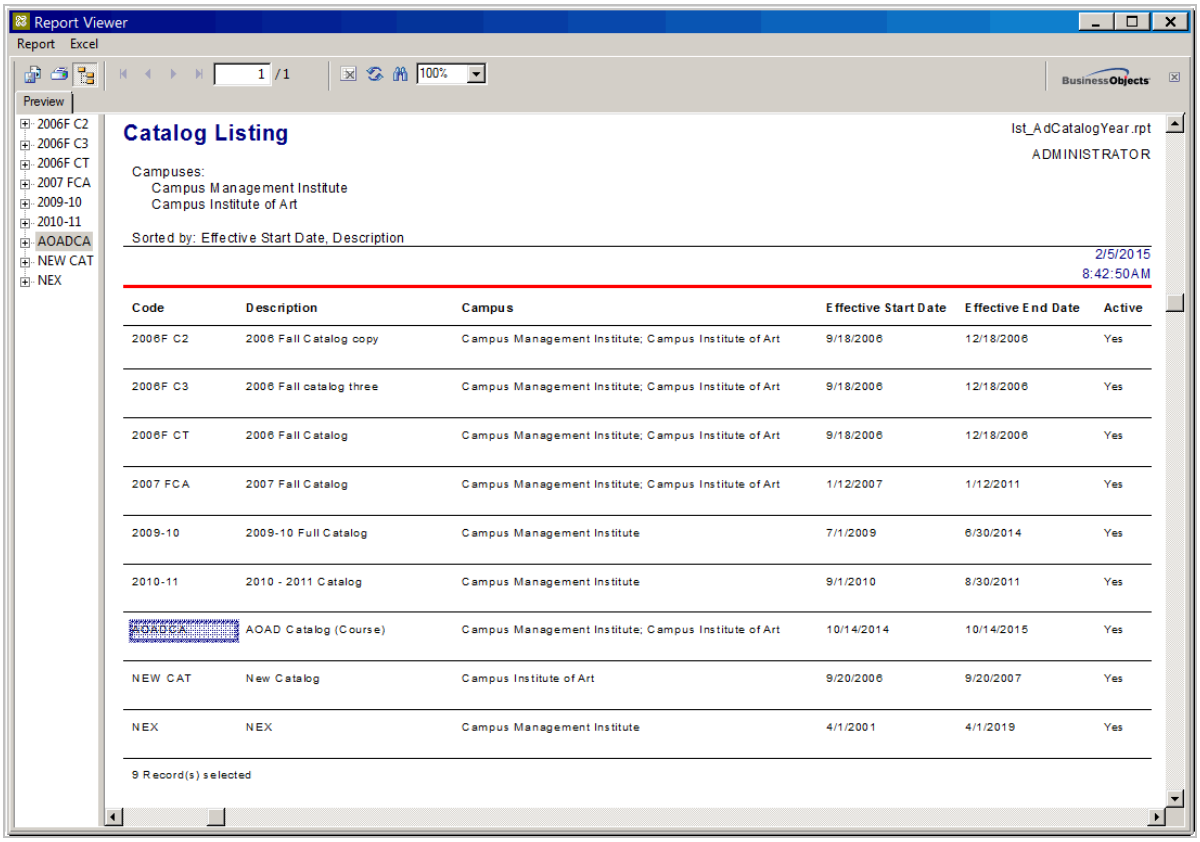
1. On the Setup - Academic Records List [Catalog] form, select a catalog to use as a template to create a new catalog, and click **Copy Catalog** . The Copy Catalog form is displayed. The Campuses fields are disabled since you are copying a catalog that is already associated with one or more campuses. You can modify the campus association after the required fields are completed and saved.



2. Specify the required values for the catalog copy (as if you were creating a new catalog, instead of copying a catalog).
3. Click **Save**. The Courses button is enabled.
4. Click **Courses**. The courses that were selected in the copied catalog are listed in the assigned courses list. Remove or assign any courses as needed.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

To print a catalog list:

1. On the Setup - Academic Records List [Catalog] form, click **Print**. The Report Selection form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.
4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

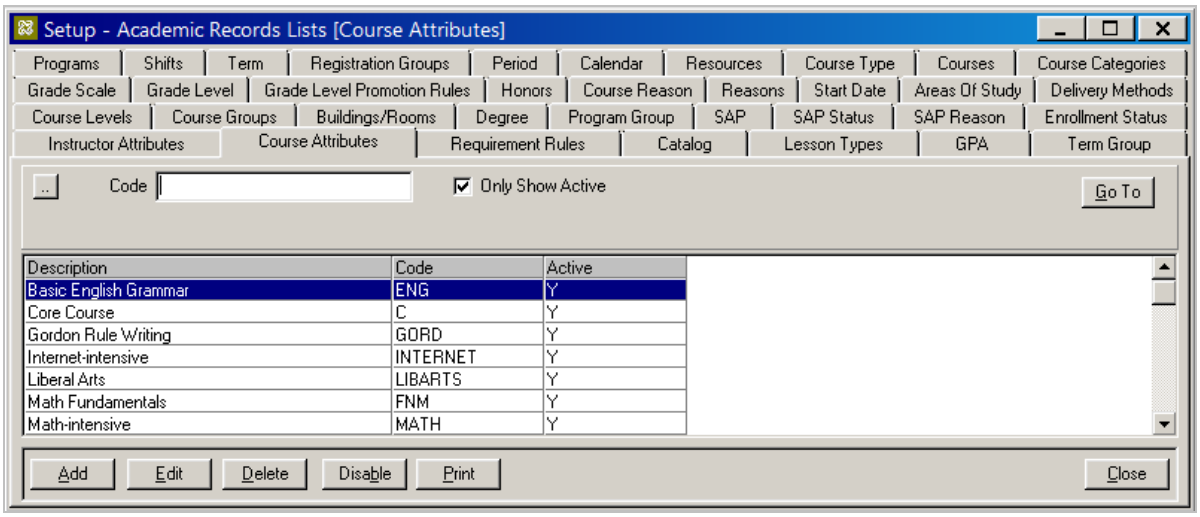


Setup - Academic Records Lists [Course Attributes]

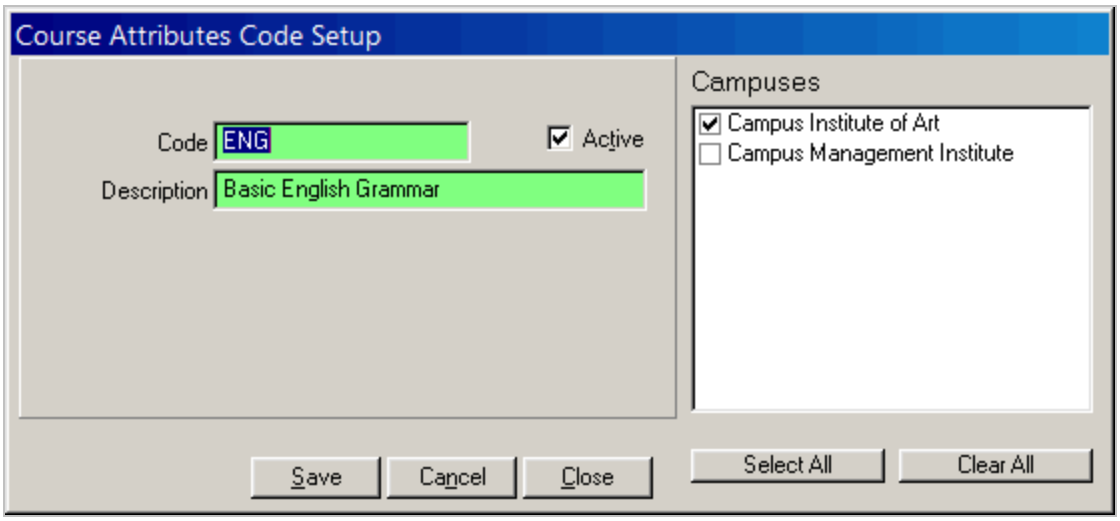
You can set up a list of attributes to be associated with courses at the course list level. These attributes allow you to categorize courses on the course list level in addition to the course level and course type.

To add or edit a list of course attributes codes:

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Course Attributes**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Course Attributes Setup form is displayed.



6. Specify a unique **Code**.

7. Enter a **Description**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Select one or more **Campuses**.
10. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

After the Course Attribute has been saved, if a user enters a duplicate course attribute Code, CampusNexus Student displays a warning message and does not save the duplicate Code.

Setup - Academic Records Lists [Course Categories]

The Course Categories table summarizes the required courses for each program version by category. It is referenced when building course lists for program versions. The Course Categories table holds one record for each category of courses.

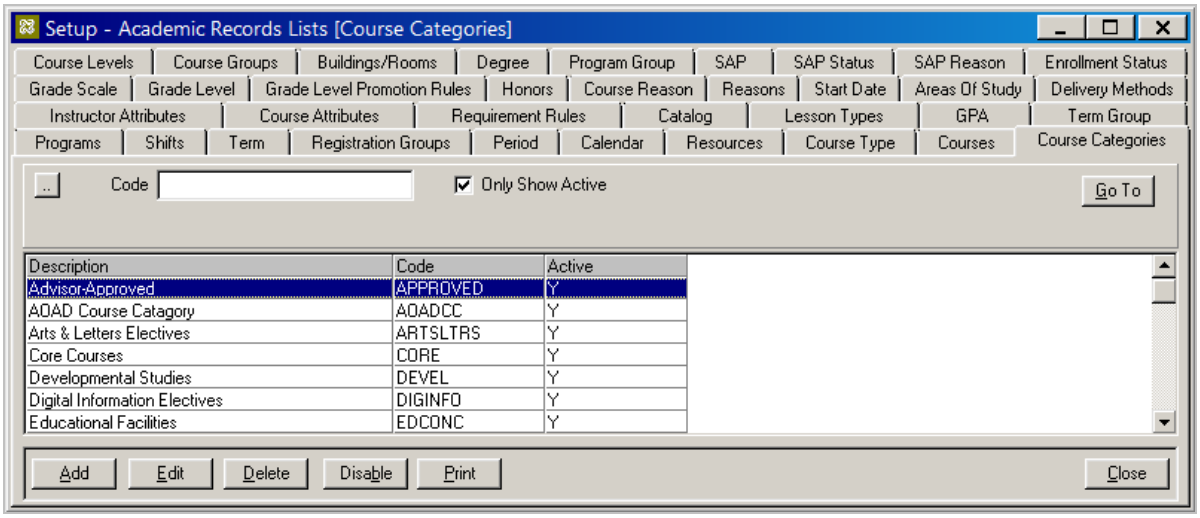
Using the categories, an institution can define the requirements for each program version.

Course Categories Example

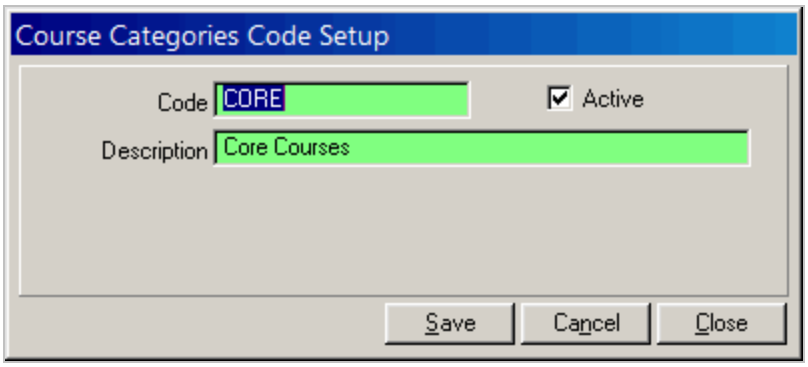
Program Version		Associate of Applied Science Business	Credits
Category		**Core Curriculum**	**20**
	Courses	ACC100 Accounting	4
		BUS101 Introduction to Business	4
		BD122 Keyboarding	4
		CO155 Business Communication	4
		IS122 Introduction to Computers	4
Category		**Mathematics/Science**	**12**
	Courses	EN111 Principles of Algebra	4
		EN202 Intermediate Algebra	4
		ELECT	4
Category		**Humanities**	**16**
	Courses	EN100 Composition	4
		EN150 Speaking	4
		EN160 Essay	4
		ELECT	4

To add or edit a list of codes for Course Categories:

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Course Categories**.



3. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Course Categories Code Setup form is displayed.



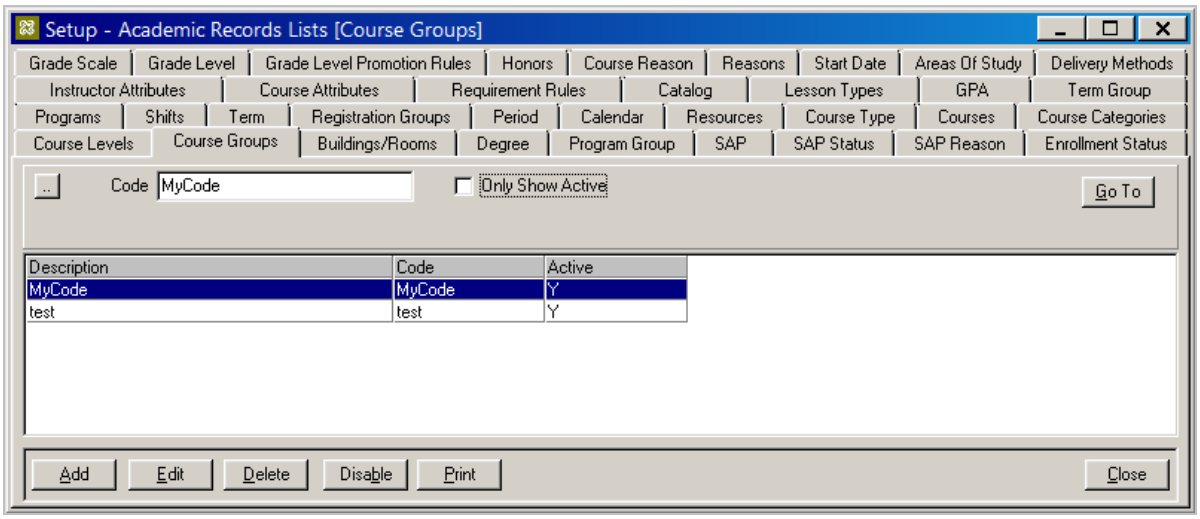
6. Specify a unique **Code**.
7. Enter a **Description**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Academic Records Lists [Course Groups]

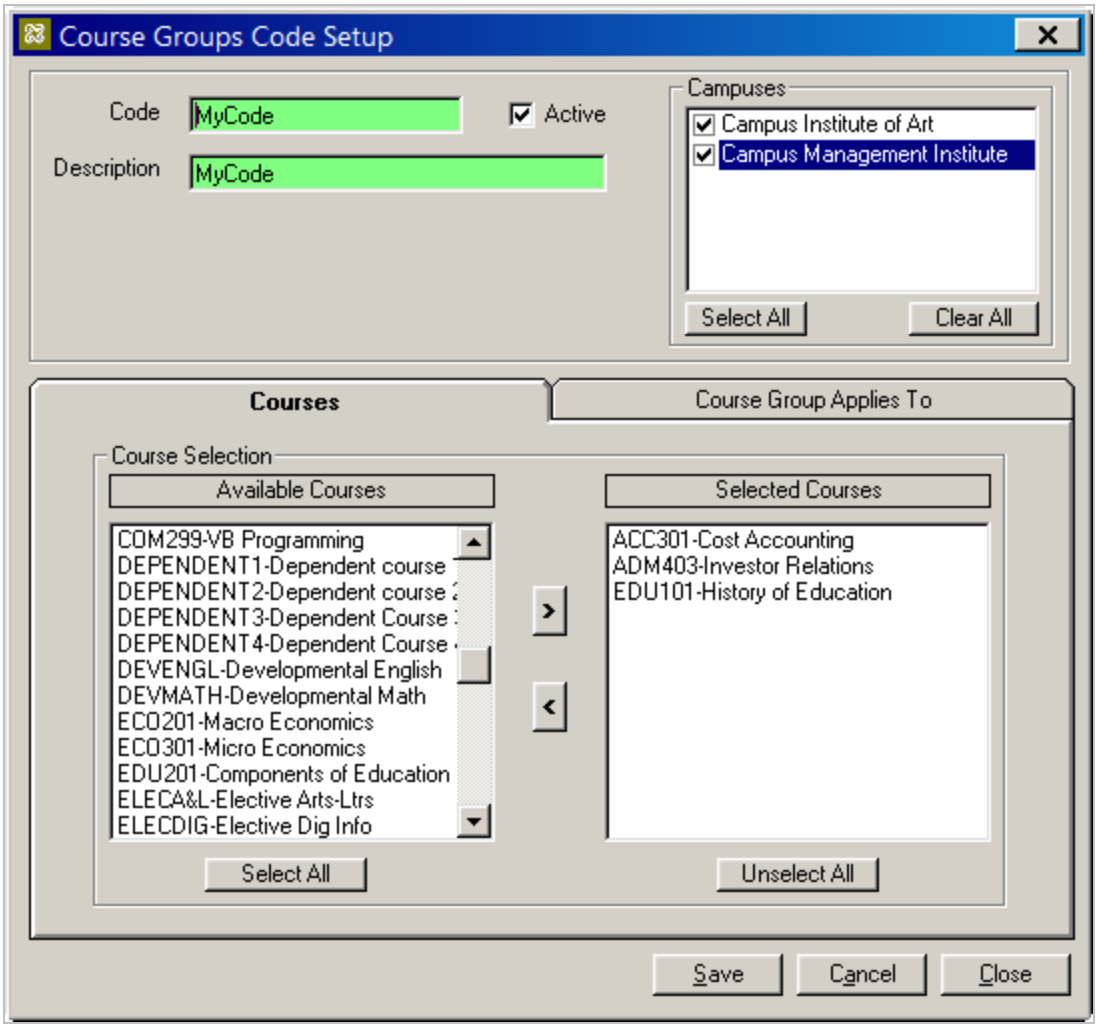
Institutions create course groups to set up a predefined list of elective or substitution courses. Once a course group has been defined, you can assign all the courses contained in a course group to a course's elective/substitution pool, rather than having to assign each course individually.

To add or edit a course group:

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Course Groups**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Course Groups Code Setup form is displayed.

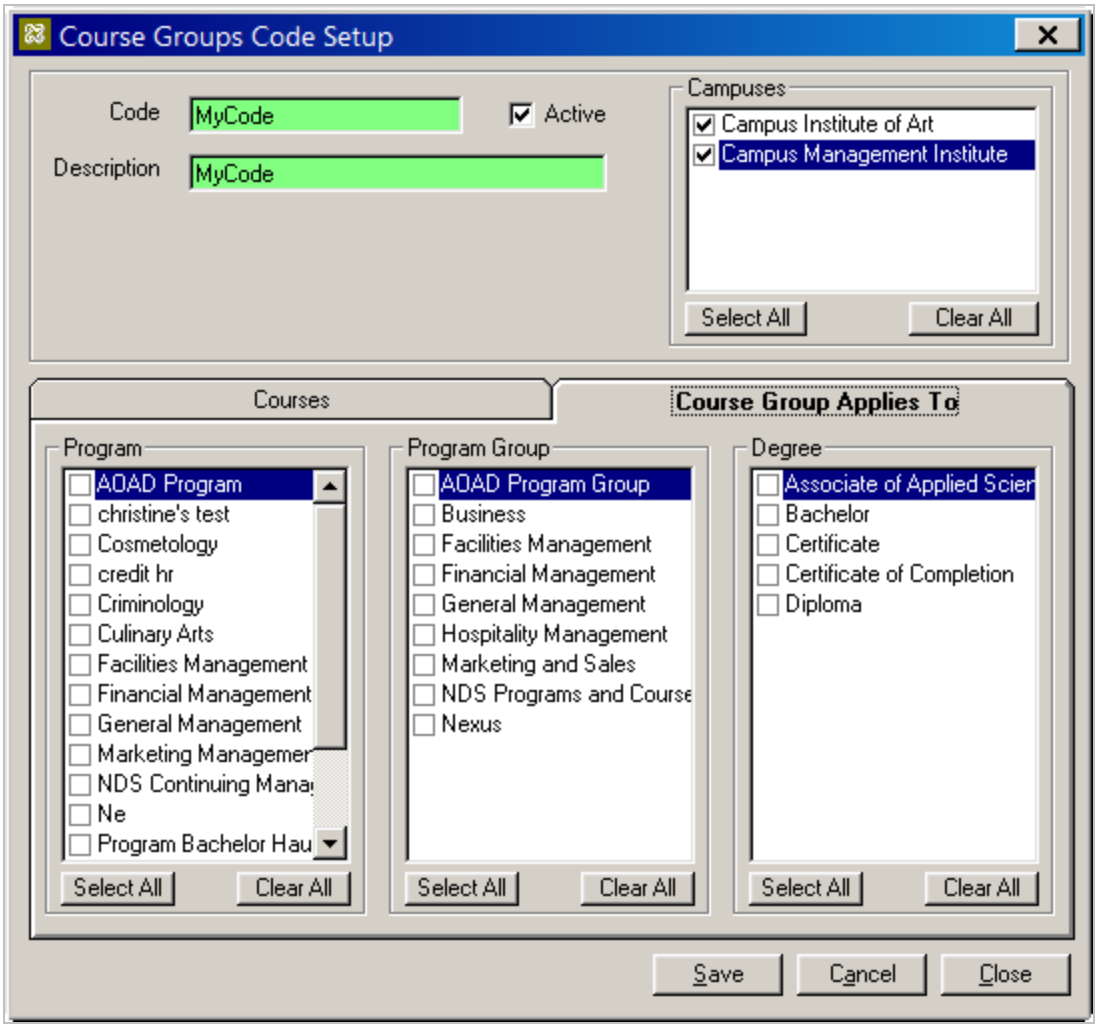


6. Specify a unique **Code**.
7. Enter a **Description**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Select one or more **Campuses**.

   The campus list associated with the course group record controls the filtering of courses that can be selected for inclusion in the course group.

   The filtering of course groups available for selection when creating a required course list for a program version is based on the campuses associated with the course group.
10. On the **Courses** tab, select the courses to be included in the course group from the **Available Courses** list; click > to move the courses to the **Selected Courses** list.

    Note: The list of Available Courses is filtered based on the campus selection.
11. Click the **Course Group Applies To** tab.



12. Select the appropriate filters for **Program**, **Program Group**, or **Degree**. You can select multiple filters for the course groups being defined. These filters separate course groups into logical categories and limit the course groups available for selection within the required course list configuration to only those course groups that are applicable to the program version for which the required course list is being created. The course groups are only available when adding substitution pools to courses in program versions whose attributes satisfy the specified filter criteria.

13. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Academic Records Lists [Course Levels]

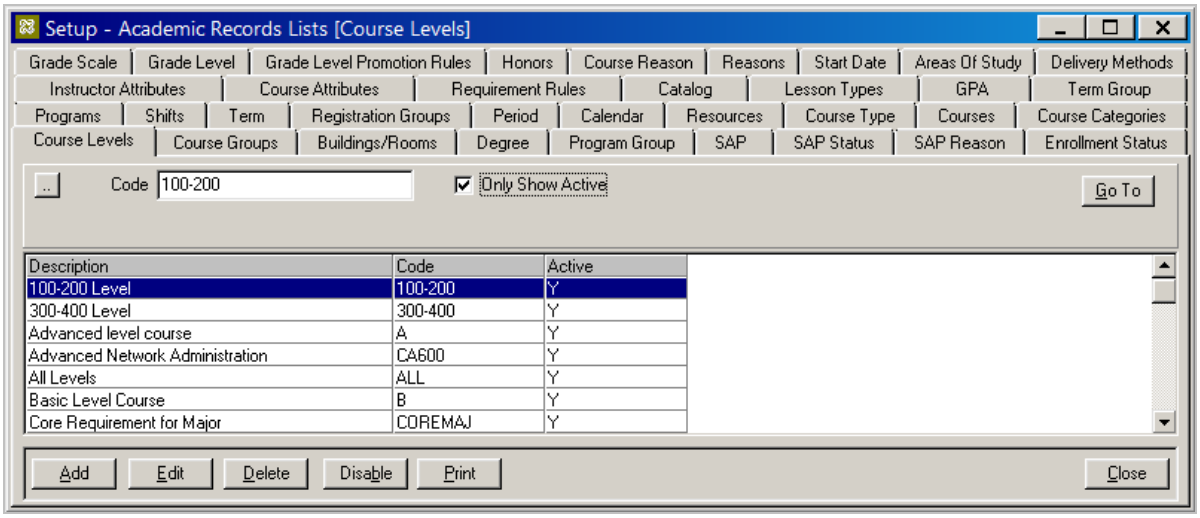
Course level codes are assigned for billing purposes. Certain graduate level courses, for example, might cost more than under-graduate courses.

Note: The course level code could be useful in preparing your school catalog.

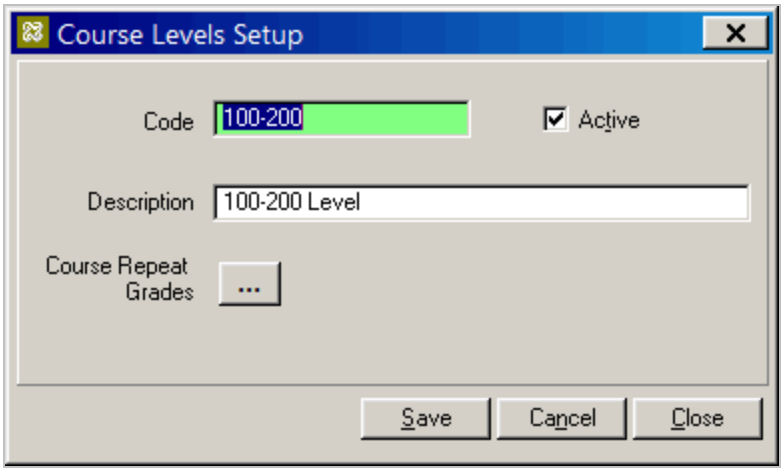
Only the system administrator (SA) can add or edit course levels.

To add or edit a course level:

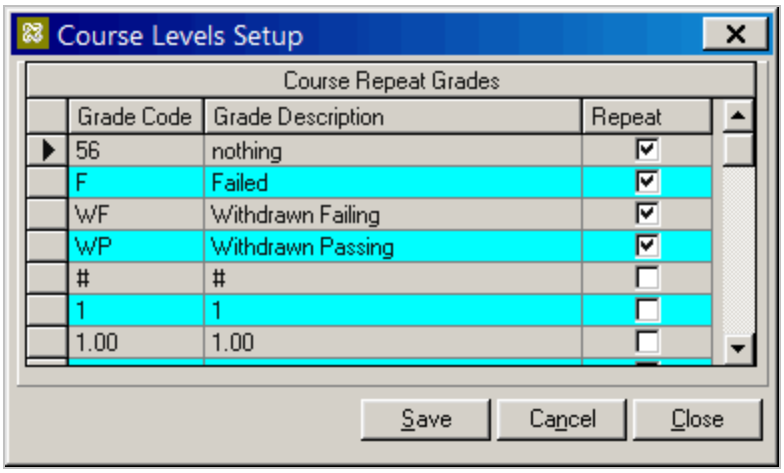
1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Course Levels**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Course Levels Setup form is displayed.



6. Specify a unique **Code**.
7. Enter a **Description**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Click ... next to Course Repeat Grades. The Course Levels Setup - Course Repeat Grades form is displayed.



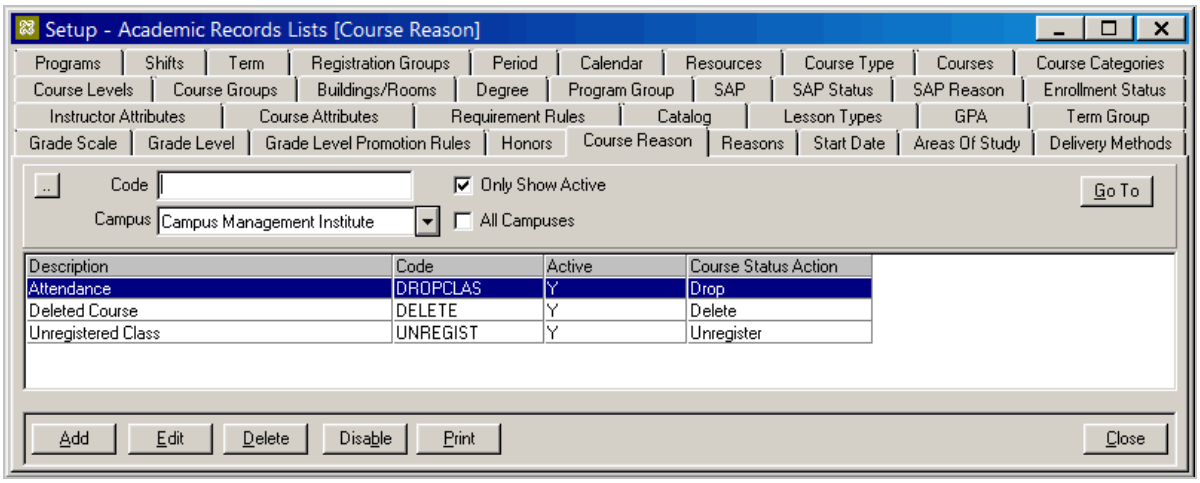
10. Select the **Repeat** check box for each grade code that causes the course to be added back to the student's schedule and flagged for repeating.
11. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Academic Records Lists [Course Reason]

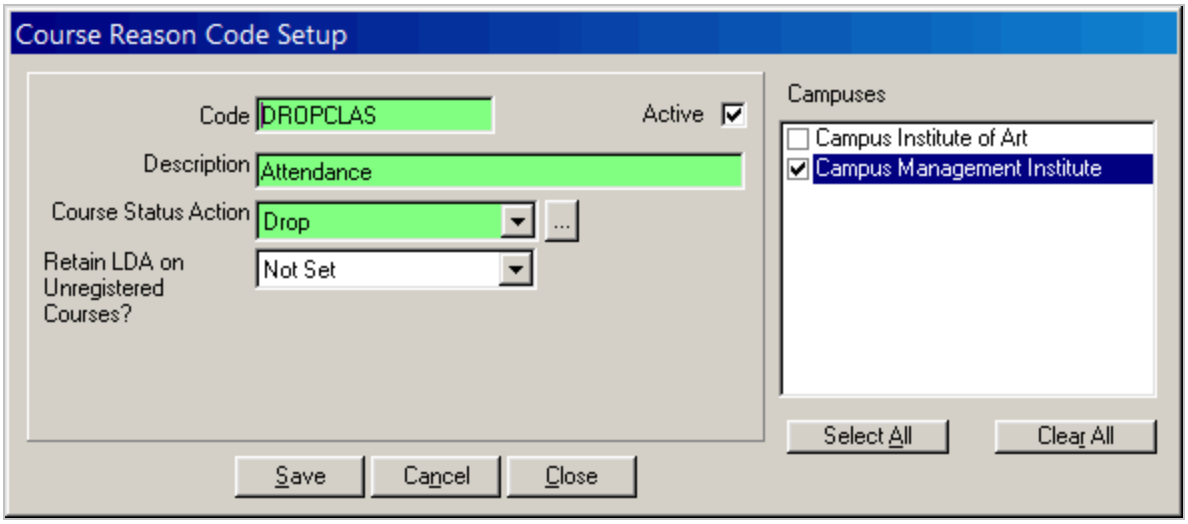
The Course Reason list contains common reasons for a change in school status. Using this list, you can track possible reasons for students dropping a course within the first eight days of the class schedule. The list helps you maintain a history of course status changes for each student.

To add or edit reasons for course status changes:

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Course Reason**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Course Reason Code Setup form is displayed.



7. Specify a unique **Code**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Enter a **Description**.
10. Select one or more **Campuses**.
11. Select a **Course Status Action**. Available options include:
    - Unregister
    - Drop
    - Delete
12. Select one of the following options from the **Retain LDA on Unregistered Courses** list:
    - Select **Yes** to keep the Last Day Attended (LDA) for the specific course even though the attendance is being removed.
    - Select **No** to discard the LDA from the student's attendance records for the unregistered course. The LDA is reset to the last date the student was in attendance in courses other than the unregistered course.
    - Select **Not Set** to allow the LDA to be modified depending on the 'Retain LDA on Unregistered Courses' setting at the term or campus level.
13. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Academic Records Lists [Course Type]

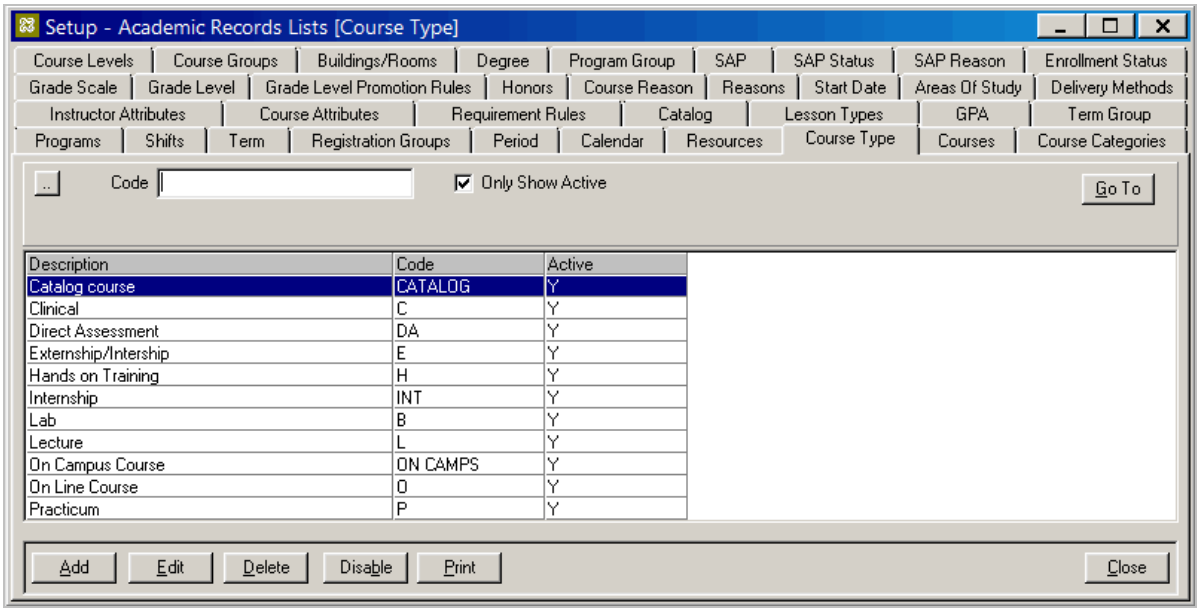
The Course Type list contains descriptions and codes for specific types of courses, for example, lecture, laboratory, internship, and so on. A course type is associated with each course that you offer in your programs of study.

Some course types are system-defined and cannot be edited or deleted. For system-defined course types, the Active field is selected and set to read-only mode. Examples of system-defined course types include:

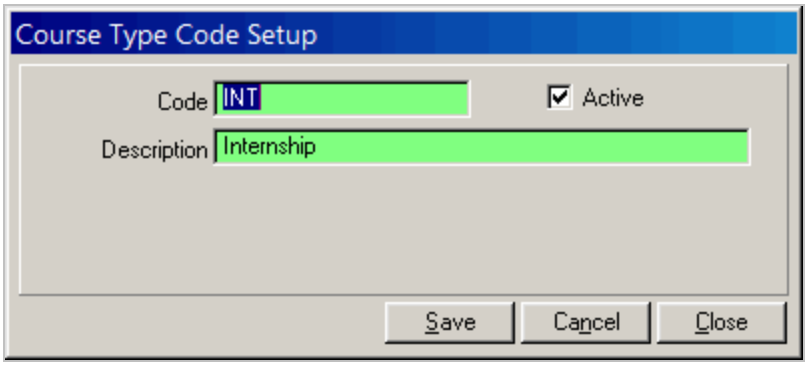
- Externship/Internship
- Online Course Type - This course type is used with the Auto Create Course Section feature.

To add or edit a course type:

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Course Type**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Course Type Code Setup form is displayed.



6. Specify a unique **Code**.
7. Enter a **Description**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

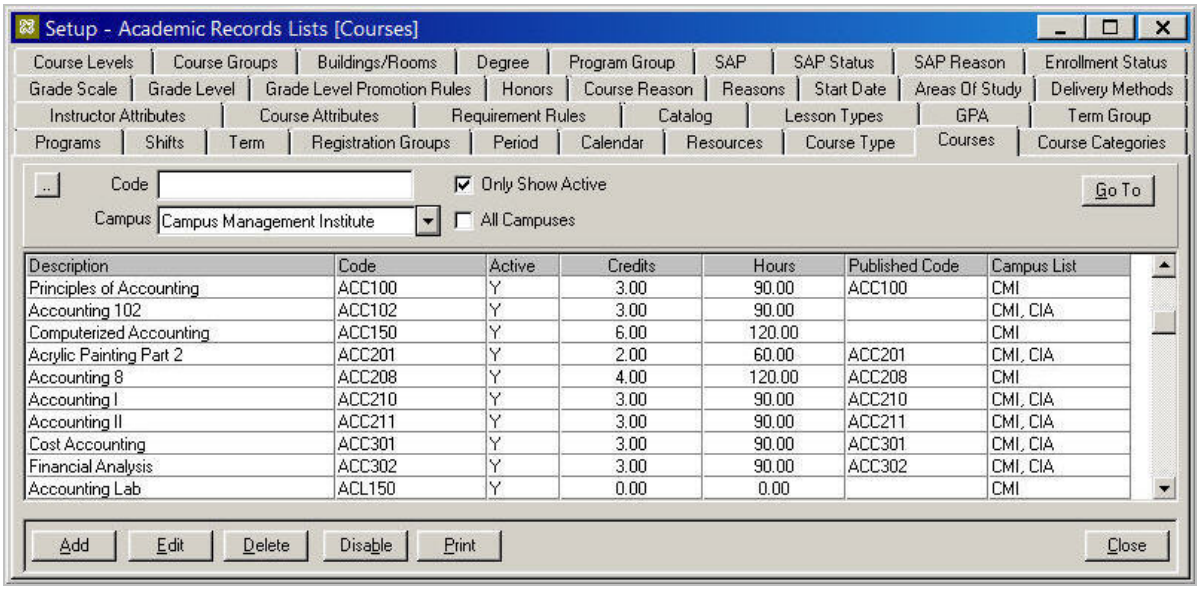
Setup - Academic Records Lists [Courses]

The Setup - Academic Records Lists [Courses] form is used to define course codes and properties, such as title, type, credits, grade levels, pass/fail settings, prerequisites, fees, etc., for every course offered in every program in your institution.

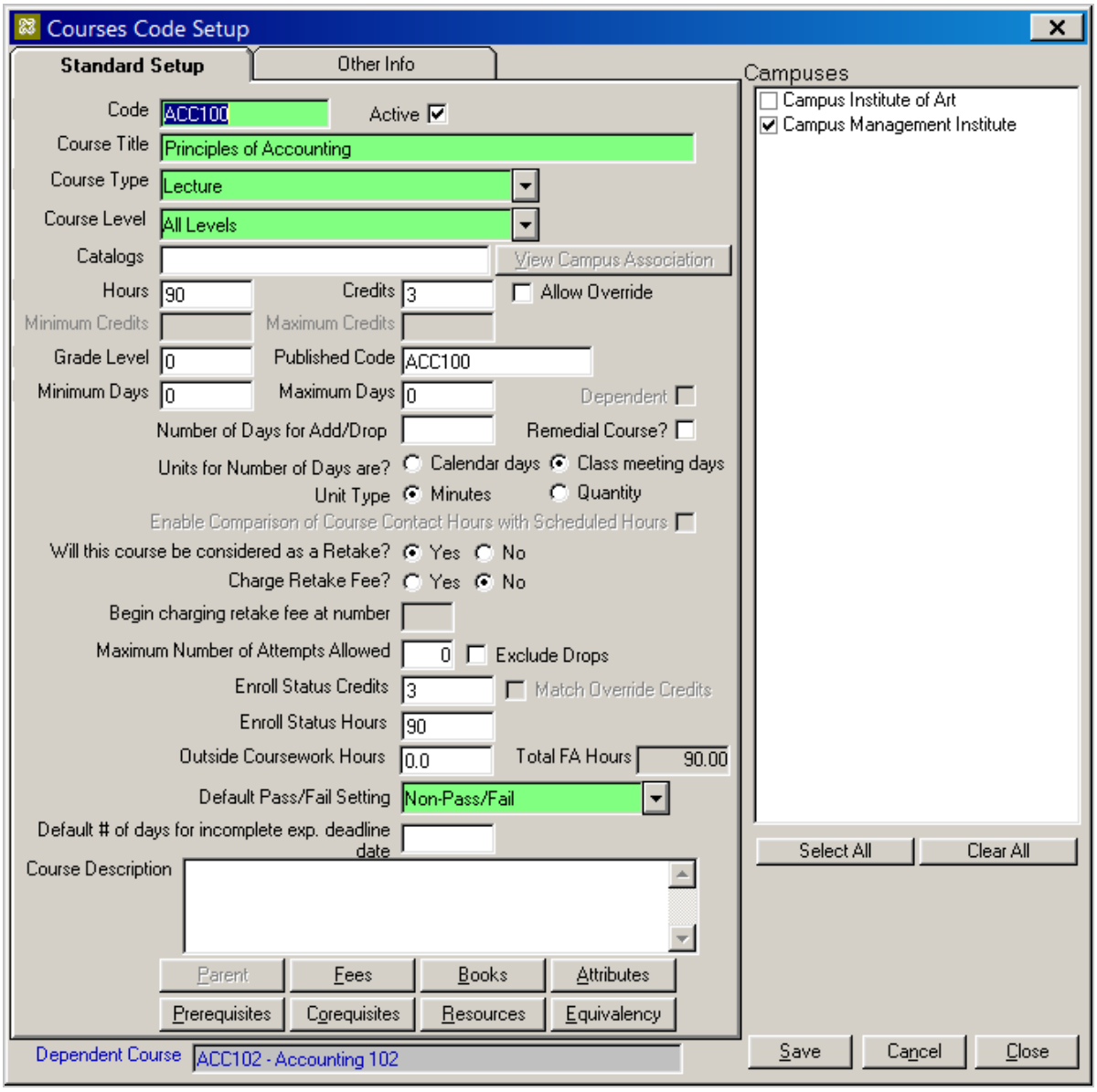
Note that courses are offered to students and scheduled in class sections. For more information, see Class Schedule.

To add or edit a course:

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Courses**.

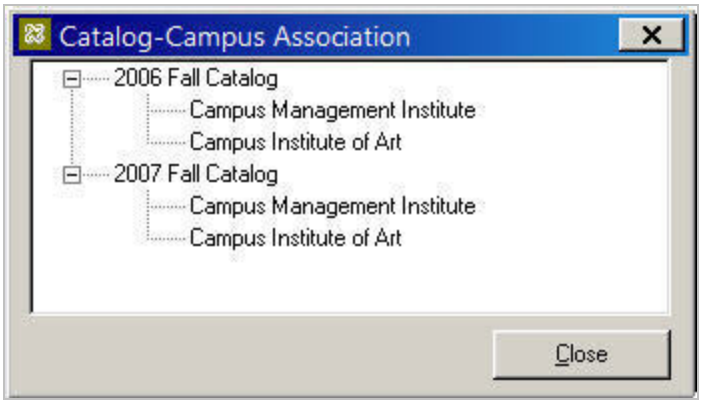


3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Courses Code Setup form is displayed.



7. Specify appropriate options on the Standard Setup tab. See Field Descriptions - Standard Setup Tab.
8. The Other Info tab is populated with school- defined fields based on the settings in School Defined Fields > Entity . If school-defined fields exist, specify appropriate options.
9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Field Descriptions: Standard Setup Tab

Field	Description
Campuses	Select the campuses that offer (share) this course. If you do not have access to a campus in the list, the campus name is enclosed in brackets [ ]. Note that you are selecting individual campuses, not campus groups. When saving the record, a campus group is dynamically created or updated for all campuses selected. The campus group type is set to "C" for the new campus group.
Code	Specify a unique code up to 12 characters in length. (This is in contrast to most other codes in CampusNexus Student, which are 8 characters long.) We recommend that you do not include the section number as part of the course code. When setting up class sections, provision is made for a unique section number for each section of a class. Many CampusNexus Student features depend on section numbers to identify class sections as differentiated from courses.
Active	Select or clear the **Active** check box to designate the record as active or inactive, respectively.
Course Title	Specify the Course Title.
Course Type	Select a Course Type. If 'On Line Course' is selected, the course may be configured to automatically generate a new course section when the remaining seats threshold has been reached.
Catalogs	If a campus configures program versions using catalogs and a school-defined catalog has been set up for the course, it is displayed in the Catalogs field, and the View Campus Association button is enabled.
View Campus Association (button)	Click the View Campus Association button, if enabled, to view the course's catalog-campus association. 
Hours	Enter the number of hours for the course. If the Dependent course check box is selected, the Hours field is disabled. This field is not applicable for a dependent course.

Field	Description
Credits	Enter the number of credit hours for the course. If the Dependent course check box is selected, the Credits field is disabled. This field is not applicable for a dependent course.
Allow Override	Select this check box if the user who registers a student in the course is allowed to override the number of credits and hours awarded upon successful completion of the course. When Allow Override is selected, the Minimum Credits and Maximum Credits fields and the Match Override Credits check box are enabled. **Note**: If student registration lock configuration is enabled, upon checking the Allow Override check box, the Registration Locks are evaluated when you change the course values for Credits and/or Hours. If such changes are made on a course that is in a status other than Future, it may affect the configured registration locks.
Minimum Credits	For variable credit courses, enter a value representing the minimum number of credits a student could elect to receive when taking the course. If the Minimum Credits and Maximum Credits fields are blank, staff and students may enter any credit value during course registration.
Maximum Credits	For variable credit courses, enter a value representing the maximum number of credits a student could elect to receive when taking the course. If the Minimum Credits and Maximum Credits fields are blank, staff and students may enter any credit value during course registration.
Grade Level	Select a Grade Level to indicate the grade at which the student typically takes this course. The grade level corresponds to Freshman, Sophomore, Junior, Senior, Post Graduate, etc. (This is not the same "Grade Level" indicator that is asked for when completing the FAFSA).
Minimum Days	For distance learning, enter the minimum number of days the student must spend on this course.
Maximum Days	For distance learning, enter the maximum number of days the student can spend to complete the course.
Dependent	Leave the Dependent check box cleared (default when adding a course) if the course is a parent course. A parent course can have only one dependent course. Select the Dependent check box if the course is a dependent course. In this case the Credits, Hours, Enroll Status Credits, and Enroll Status Hours fields are disabled and the Parent button is enabled so that you can select one or more parent courses. See Parent Course Setup. **Note**: CampusNexus Student prevents you from disabling or deleting a dependent course until you first remove the parent association. When you delete a dependent course, the relationship to the parent course is removed. The parent course can be used for a new dependent course. If you disable the dependent course, the relationship is maintained. You must manually remove a parent course from a disabled dependent course. This prevents any conflict if the disabled course is later enabled.

Field	Description
Remedial Course?	When adding a new course, this field is cleared by default. Select this check box if the course is a remedial course. Remedial courses can be assigned to a student based on failing test grades. Entrance tests can be established for programs, program versions, or agencies. You can specify a course to add to a student's program or program version if the student's test score falls below the minimum score defined. When you enter test scores, CampusNexus Student checks for a passing score, and if not achieved, adds the specified course to the student's course schedule in a Future status if it is not already included on the student's course list. If the student scores at or above the required minimum score for a program version, the course is not added to the student's schedule. A course can only be designated as remedial on the Course Code Setup form. This setting does not impact CampusNexus Student elsewhere. The remedial designation prevents students from modifying courses identified as remedial on their schedule through Online Registration in Portal.
Number of Days for Add/Drop	The Number of Days for Add/Drop represents the number of calendar days or class meeting days (depending on the Units for Add/Drop), starting with the course section's start date, that is allowed for add/drop. It is not a required field. The default value is blank.
Units for Number of Days are?	Specify if the number of days value represents 'Calendar days' or 'Class meeting days'. **Note**: The 'Number of Days for Add/Drop' field and the radio buttons (Calendar days and Class meeting days) in the 'Units for Numbers of Days are?' field are visible only if at least one campus associated with the course is configured with the campus Add/Drop Flag set to 'S' (see Course Section Enforced) at Setup > Campus Locations > Add/Edit > Acad. Records (tab) > General (subtab).
Unit Type	Select Minutes or Quantity as the units in which attendance is measured. Use Minutes for traditional class room situations. Use Quantity for quantifiable goals such as the number of tasks completed.

Field	Description
Will this course be considered as a Retake?	Select Yes (default) to mark the course as one that is affected by your institution's retake procedures. If No is selected, users can indicate whether the course will be considered as a retake when a student is registered in the course. For example, a student must take Physical Education once each semester. The grade received by the student in each occurrence of Physical Education is counted in the student's GPA rather than being run through the retake logic applied to other retaken courses. **Note**: Enrollment status credits from the student's schedule are used to determine a student's enrollment status for financial aid purposes. If a student is enrolled in a term based program version and the course is being registered as a retake, and this is the second retake of the course, then CampusNexus Student validates that the course being registered is a second retake of a passed course and populates the Enrollment Status Credits field with '0' on the student's schedule folder. CampusNexus Student flags the course as a second retake of a passed course and audits the change in the Enroll Status Credits. The Audit folder is updated whenever the enroll status credits are set to '0' as a result of the course retake regulation. The reason filed in the audit folder are updated to indicate why changes were made to the enroll status credits. For example, a student registers in ENG 101 the first time and passes it, and then retakes ENG 102 (which is an equivalent of ENG 101) the second time and passes it, and then retakes ENG 101 or ENG 102 once again; the Enrollment Status Credits field should be populated with '0'. This logic applies across all the enrollments. For example, a student has multiple enrollments. Math 101 is required in all the enrollment program versions. Math 101 is completed and passed as part of one enrollment. If the student decides to take the same course again as part of another enrollment, then it will also be considered as a retake. Upon registration, if the course being registered gets flagged as a retake, and this course was previously retaken twice, and the retaken courses satisfy the criteria below, the enroll status credits of the course being registered are set to '0'. By setting the enroll status credits to '0', this course is not counted in the enrollment status calculation. Criteria: • Course has been passed two times and credits have been earned. • Course has been failed the first time and passed two times after failing it. • Course has been passed the first time and failed the second time. • Course has been dropped two times. • Course has been passed the first time and dropped the second time. • Course has been dropped the first time and passed the second time. • Course has been was passed the first time and placed in current status the second time. • Course has been dropped the first time and placed in current status the second time. **Note**: If a student drops or fails a course twice, they can take the course a third time and the enrollment status credits will NOT be set to zero. A course has to be registered as a retake to apply the retaking course work regulation, which is setting the enrollment status credits to '0' to ensure that the enroll status credits from a course that is being retaken for a second time is not considered if credit has been previously earned in

Field	Description
	calculating enrollment status that is used for determining Title IV eligibility. CampusNexus Student does not allow a student to have credits for a second retake counted for the course for determining the student's enrollment status for Title IV aid. This rule applies to the second retake of a course that the student has already passed and been given credit; it also applies to the third (or greater) time the student is taking the course. For example, consider a course that has been registered in term 1, passed, and earned credits. Then this course is registered as a retake in term 2, passed and earned credits. The same course gets registered as a retake the second time in Term 3, which is when the enroll status credits is set to '0', so that the enroll status credits of this course do not get included in the enrollment status calculation of term 3. An institution may pay a student one time for retaking previously passed coursework (except not if due to the student failing previous courses). For example, a student is retaking the course because he or she needs to meet an academic standard for that particular course, such as a minimum grade. An institution may not pay a student for retaking previously passed courses if the student is required to retake those courses because the student failed a different course in a prior term. For example, if a student enrolls in four classes in the fall semester and passes three of them, the institution could require the student to retake the failed class and also require the student to retake the other three classes because of failing the one class. If the student retakes the four classes in the spring semester, the failed class would be included in the student's enrollment status, but the three classes passed in the fall would not, for Title IV purposes. Title IV funds may be paid for only one retake of a course. The Course Retake logic ensures that credit associated with a course is only counted once for determining whether a student has successfully completed previous term payment periods and is therefore eligible to receive the next disbursement. Students who fail a course in a term based program may still be paid multiple times for retaking that course in subsequent terms; however, students who have previously passed a course and received credit may be paid for retaking that course, for example, to receive a better grade. A course being registered is flagged as a current retake if the previous retaken course is a dropped with the drop grade, and the drop grade is configured to 'Include in the GPA' on the grade scale. Cross-reference courses are also flagged as retakes. LOA classes are not impacted by because the student should have completed all the courses that are in LOA before registering into any new courses to be eligible for the Title IV funds. **Note**: This only applies to term based program versions, which means that the program version's academic calendar is configured as 1, 2, 3, or 4.
Charge Retake Fee?	Use this option when courses require a retake fee. This field is enabled only when 'Will this course be considered as a Retake?' is set to Yes. The default is No.
Begin charging retake fee at number	If a course has a retake fee, use this setting to define on what number of retake attempts a retake fee is charged. This field is enabled only when 'Charge Retake Fee?' is set to Yes. The default value for this option is blank. If Yes is selected, you must enter a value greater than 0. Otherwise, the following message is displayed: *"Begin charging retake fee at number must be a number greater than zero."*

Field	Description
Maximum Number of Attempts Allowed	This field specifies the default value for the 'Maximum Number of Attempts Allowed' when a course is added to a required course list. When a student is being registered for a course that is not required (i.e., it does not appear on the student's required course list), CampusNexus Student uses this value to enforce the maximum number of attempts allowed. The default value is 999. **Note**: The 'Begin charging retake fee at number' value cannot be greater than 'Maximum Number of Attempts Allowed'. If the value is exceeded, the following message is displayed: *"Value of 'Begin charging retake fee at number' cannot be greater than 'Maximum Number of Attempts Allowed'."*
Exclude Drops	This option specifies the default setting to use when a course is added to a required course list. When a student is being registered for a course that is not required, CampusNexus Student uses this setting to determine whether to count dropped courses towards the maximum number of attempts allowed.
Enroll Status Credits	If your institution offers 0 credit courses that cannot be taken for academic credit, but can be used to calculate a student's enrollment status for financial aid purposes, enter the number of credits that can be used for this course towards the calculation of a student's enrollment status. These courses can include, for example, graduate level internships that are a required part of the academic program but do not earn academic credit hours and do not contribute towards academic progress calculation. The number entered in this field is used in enrollment status calculations and automated disbursement approval for credit hour programs. If this field is left blank, CampusNexus Student populates it with the value saved in the Credits field. **Note**: If this is a dependent course, the Enroll Status Credits field is disabled.
Match Override Credits	This check box is enabled only if the Allow Override check box is selected. When this option is selected, the Enroll Status Credits field in a student's course information record always contains the same value as the Credits field. If a student taking a variable credit course elects to take a different number of credits than is standard for the course, the Enroll Status Credits field receives the number of credits that the student selected. If Allow Override is not selected, the Enroll Status Credits field in a student's course information record always contains the same value as is defined in the Courses Code Setup form.

Field	Description
Enroll Status Hours	If your institution offers 0 hour courses that cannot be taken for academic credit, but can be used to calculate a student's enrollment status for financial aid purposes, enter the number of hours that can be used for this course towards the calculation of a student's enrollment status. These courses may include, for example, remedial courses that are part of the academic program but do not earn academic clock hours towards graduation and do not contribute towards academic progress calculation. The number entered in this field is used in enrollment status calculations and automated disbursement approval for clock hour programs. If this field is left blank, CampusNexus Student populates it with the value saved in the Hours field. **Note**: If this is a dependent course, the Enroll Status Hours field is disabled.
Outside Coursework Hours	Specify the number of outside coursework hours. Enter in 5 minute increments as expressed in hour decimals (e.g., 10 minutes is 0.17 hours).
Total FA Hours	This read-only field displays the Sum of Academic Hours/Enroll Status Hours and Outside Coursework Hours. • If Allow Courses to be exempt from progression configuration is ON on the Student Pace Evaluation setting form, Total FA Hours = Enroll Status Hours + Outside Coursework Hours; • If Allow Courses to be exempt from progression configuration is OFF on the Student Pace Evaluation setting form, Total FA Hours = Hours + Outside Coursework Hours.
Default Pass/Fail Setting	Select one of the following system-defined values that is most applicable to the course's grade scale: • Non-Pass/Fail (default) – indicates that the course is graded on a letter grade basis. • Pass/Fail (Required) – indicates that all students taking the course receive a pass/fail grade. • Student's Choice – indicates that students may elect to receive a pass/fail grade.
Default # of days for incomplete exp. deadline date	Enter the number of days past the course section end date on the course for calculating the expiration deadline date.
Course Description	Enter a full description of the course, such as the description in your catalog.
Parent (button)	This button is enabled when the Dependent check box is selected. See Courses > Parent.
Fees (button)	See Courses > Fees.
Books (button)	See Courses > Books.
Attributes (button)	See Courses > Attributes.
Prerequisites (button)	See Courses > Prerequisites.
Corequisites (button)	See Courses > Corequisites.

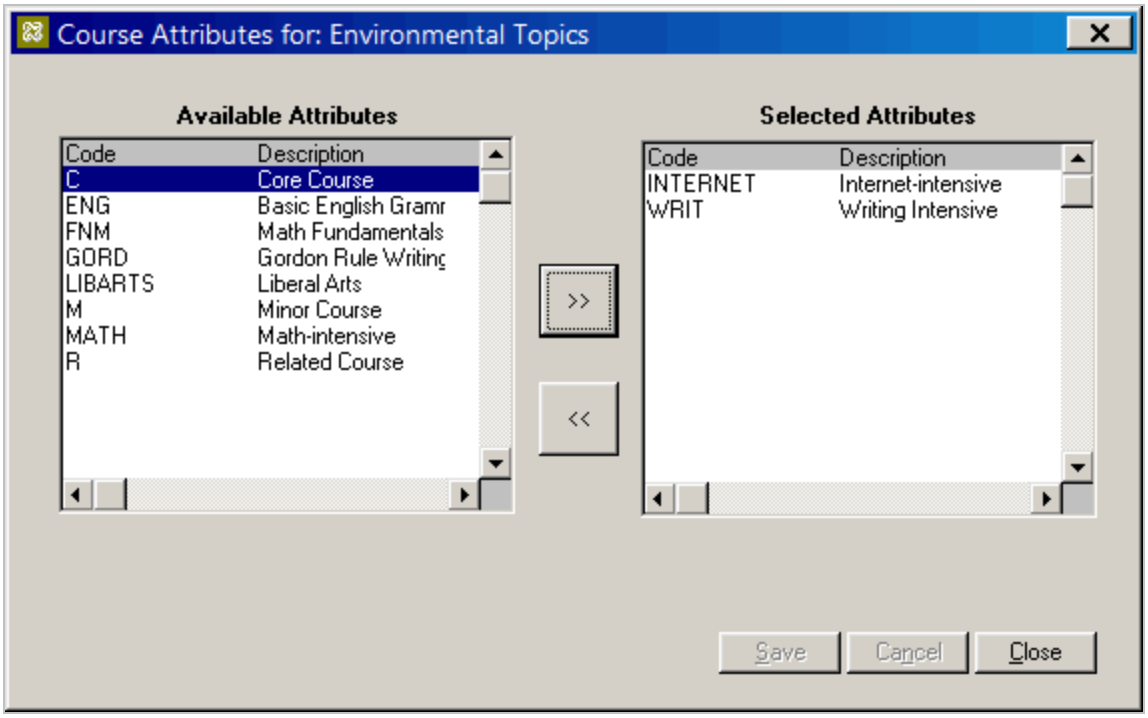
Field	Description
Resources (button)	See Courses > Course Resources. **Note**: You can associate course sections by cross-listing them to the instructional resources. Cross-listed courses are courses where two different course sections are using the same instructional resource, for example, sharing the same faculty member, or using the same room at the same time.
Equivalency (button)	See Courses > Equivalency. **Note**: The Equivalency form is also used to select cross-referenced courses if Cross Registration Sharing Groups have been set up for the campus.

Courses > Attributes

When you set up a course on the Courses Code Setup form, you can associate one or more course attributes with the course. Course attributes offer an additional categorization for courses at the course list level.

To assign attributes to a course:

1. On the Courses Code Setup form, click the **Attributes** button. The Course Attributes for: <Course Name> form displays all course attributes that are assigned to the same campus list to which the course is assigned.



2. In the **Available Attributes** list, double-click an attribute (or select an attribute and click >>).

   The selected attribute is moved to the Selected Attributes list. Repeat this step to select additional attributes.

   To undo your selection, double-click an attribute in the Selected Attributes list.

3. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

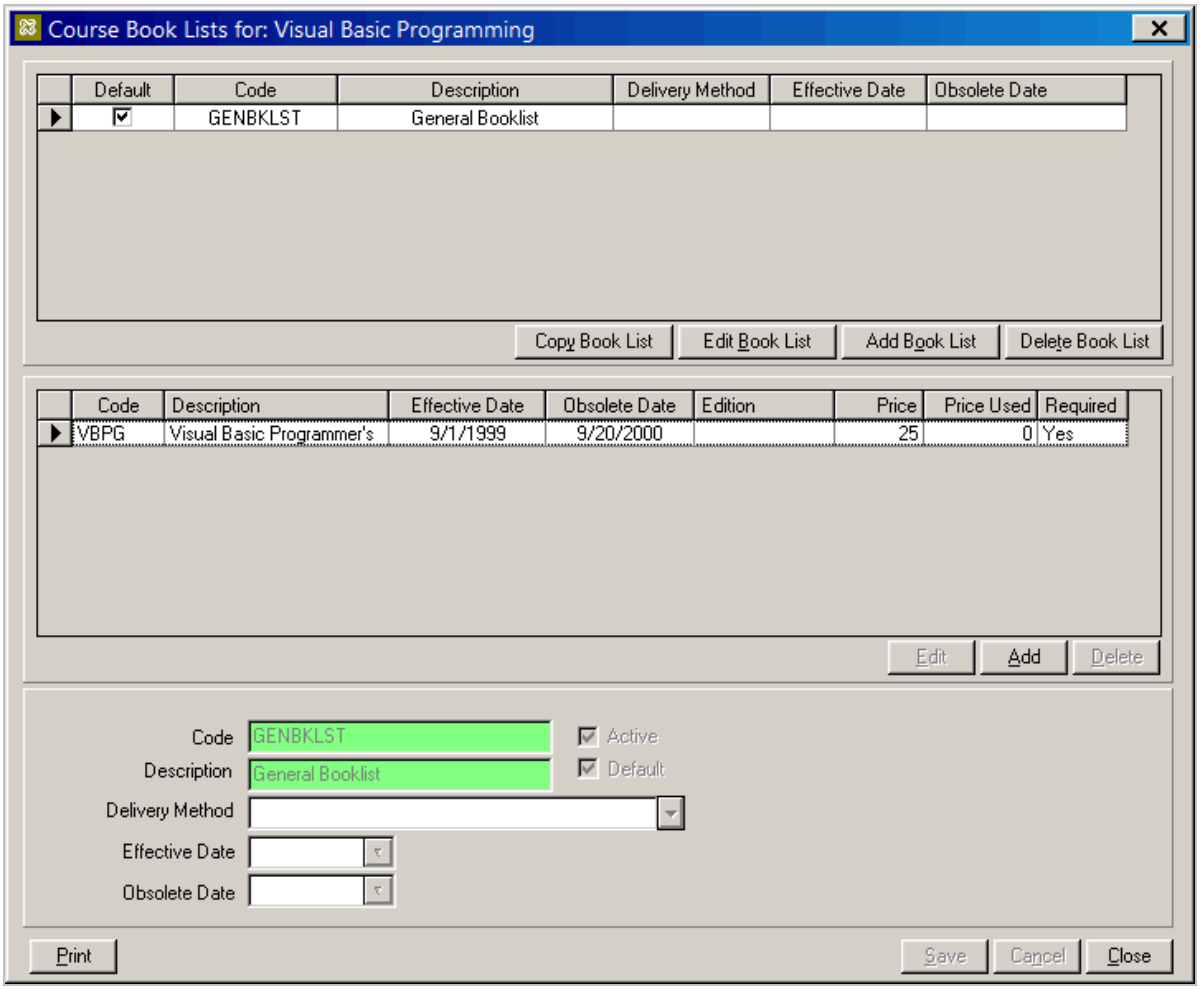
Courses > Books

Course book lists specify books and other materials that are required or recommended for a course. Multiple book lists may be created for a single course. The book lists are used by academic staff members scheduling classes to assign books to class sections.

Prerequisite: Books/items that can be selected on the book list form must first be set up under Lists > Book Store.

To add or edit a book list:

1. On the Courses Code Setup form, click the **Books** button. The Course Book Lists for: <Course Name> form is displayed.



2. Click **Add Book List**, or select a book list record in the top pane and click **Edit Book List**. The pane at the bottom of the form is enabled.
3. Specify a unique **Code**.
4. Select or clear the **Active** check box to designate the record as active or inactive, respectively.

   Note: When the Active check box is cleared, the book lists remains associated with the course but is not available when scheduling new class sections.
5. Enter a **Description**.

6. Select the **Default** check box to assign the associated books automatically to new class sections.

   When scheduling new class sections, CampusNexus Student only assigns books from book lists if the following conditions are true:

   - The book list is configured as 'Default'.
   - The class section start date falls between any Effective/Obsolete dates associated with the book list or book.
   - The book list delivery method is unspecified or matches the delivery method on the class section.

   Note: If the 'Default' setting is changed, scheduled future class sections could be affected. A message is displayed giving you the option to apply the changes to future class sections. You can select a future date to be used to determine which class sections should be updated. For more information, see Book List Updates of Course Sections.

7. Select a **Delivery Method**. The options are Classroom and Online.

   Note: If the Delivery Method setting is changed, scheduled future class sections could be affected. A message is displayed giving you the option to apply the changes to future class sections. You can select a future date to be used to determine which class sections should be updated. For more information, see Book List Updates of Course Sections.

8. *Optional*: Specify an **Effective Date** and **Obsolete Date** for the book list.

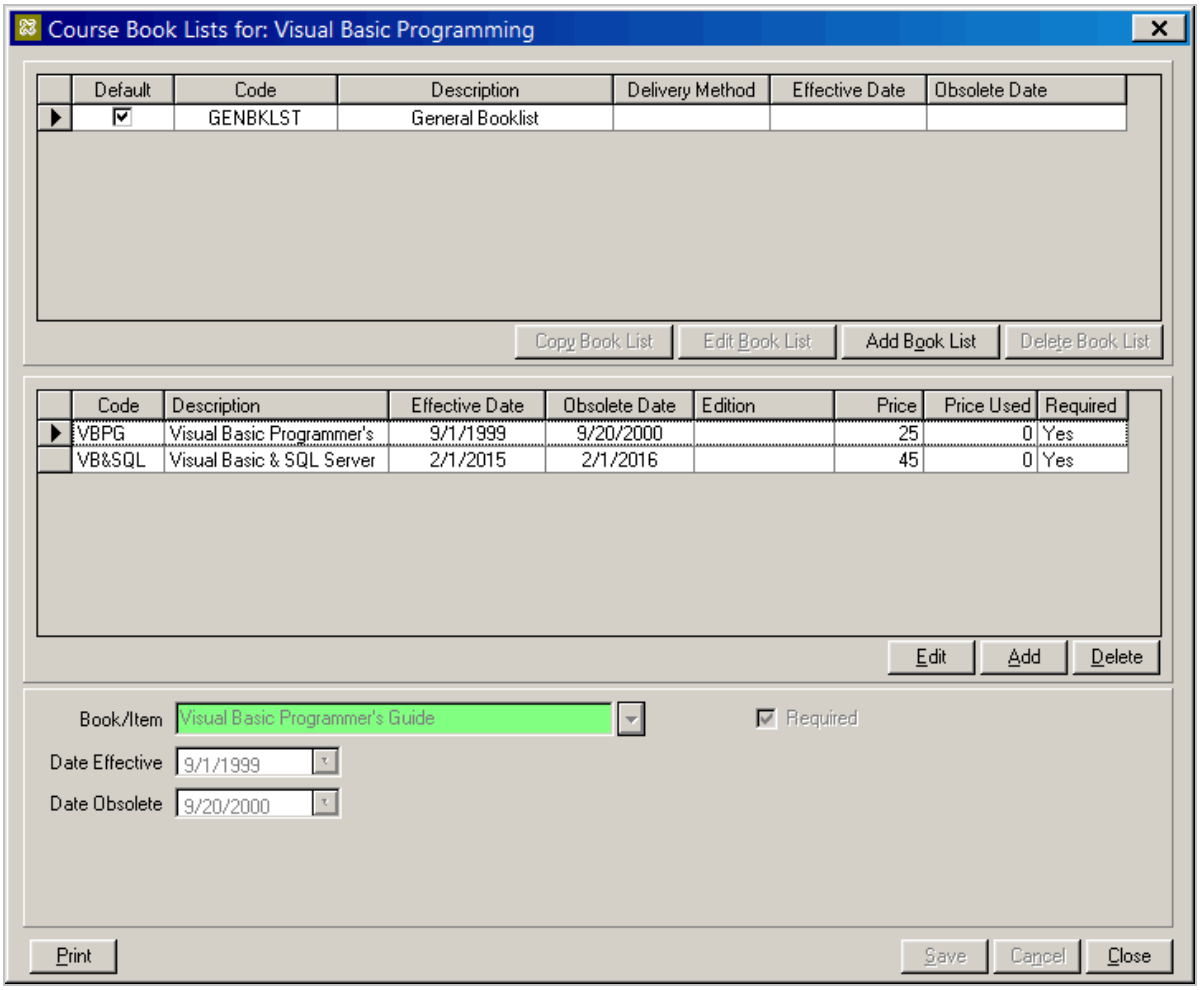
   These dates are used to filter the book lists that are available for selection when scheduling class sections. If the start date does not fall between the book list's Effective and Obsolete dates, the book list and its associated books will not be available for selection, and in the case of default book lists, will not be automatically assigned to the class section.

   Note: If the Effective Date or Obsolete Date is changed, scheduled future class sections could be affected. A message is displayed giving you the option to apply the changes to future class sections. You can select a future date to be used to determine which class sections should be updated. For more information, see Book List Updates of Course Sections.

9. Click **Save**. The Book List entry appears in the top pane of the form.

To add or edit a book list item:

1. To add an inventory item to a book list, select the book list in which the item will be placed.
2. Click **Add**, or select a record in the middle pane and click **Edit**. The pane at the bottom of the form is enabled.



3. Select an item from the **Book/Item** inventory list.
4. Select **Required** if the book is required for the course.
5. Specify the **Date Effective** and **Date Obsolete**. The dates are optional but may be used to designate when books should be available for assignment in future class sections. For more information, see Book List Updates of Course Sections.
6. Click **Save**.

   If a book/item is added and future course sections of the course are scheduled, the following message is displayed: *"Assign the book to future course section(s) through the selected book list? (Yes/No)"*. If you answer Yes, you are prompted to enter an update date. Any relevant course sections that start after the update date are updated with the newly added book. For more information, see Book List Updates of Course Sections.
7. Click **Close** to close the form.

To copy a book list:

1. Select a book list.
2. Click the **Copy Book List** button.

3. Specify a unique **Code**.
4. Click **Save**.

The copied book list is added with the same properties as the original book list and can be selected for editing.

To delete a book list

1. Select a book list.
2. Click the **Delete Book List** button.

   If the book list is assigned to any class sections, the following message is displayed: *"The book list is associated with course section(s). Deleting the book list will also delete the book list and its associated books from the course section(s). Do you want to continue? (Yes/No)".*

   - Click **Yes** to remove the book and its associated assigned books from all class sections to which it was previously assigned.
   - Click **No** to cancel the delete process.
3. Click **Save**.

Book List Updates of Course Sections

CampusNexus Student uses book lists and their associated effective/obsolete dates to assign book requirements for course sections. When a new course section is created, the book list for the course will be available on the new section based upon the Delivery Method, Date Effective, and Date Obsolete specified for the book list. If a book list was configured to be a 'Default' book list, the books associated with the default book list are assigned to the class section. If a book list is edited after being assigned to a class section, the list of books required in future course sections may need to change.

The following rules apply when a book list is modified:

When you edit the code, description, effective date, obsolete date, default, or delivery method of a book list, a message indicates that the book/book list assignment of future class sections can be updated. If you specify an update date in response to the message, that date determines which class sections are affected based upon the course start date. The following occurs:

1. The book list and associated/books are unassigned from all the future class sections if any of the following edits occur:
   a. The default flag is changed from selected to cleared and the class section is using the same delivery method as that of the book list.
   b. The effective or obsolete dates are changed, causing the class section's start date to no longer fall between the effective and obsolete date.
   c. The delivery method is changed and the class section is using the old delivery method.
2. The book list and associated books are assigned to class sections that do not already have this book list assigned if any of the following edits occur:
   a. The default flag on the book list is changed from cleared to selected.
   b. The course section has the same delivery method as that of the book list.
   c. The course section's start date falls between the effective and obsolete dates of the book list.

The following rules apply when a book record (within a book list) is modified:

When you edit a book record with changes to the effective date, obsolete date, or required field, a message indicates that the book assignment of future class sections can be updated. If you specify an update date in response to the message, that date determines which class sections are affected based upon the course start date. The following occurs:

1. The book is unassigned from all future class sections that have this book's book list assigned if effective or obsolete date change results in the class section's start date no longer falling between the effective and obsolete date.
2. The book is assigned to all the future class sections that have this book's book list assigned if effective or obsolete date change results in the class section's start date falling between the effective and obsolete dates.

   If the book is assigned to the section, the required flag of the book on the class section is updated to whatever the user selected at the book level.

Courses > Fees

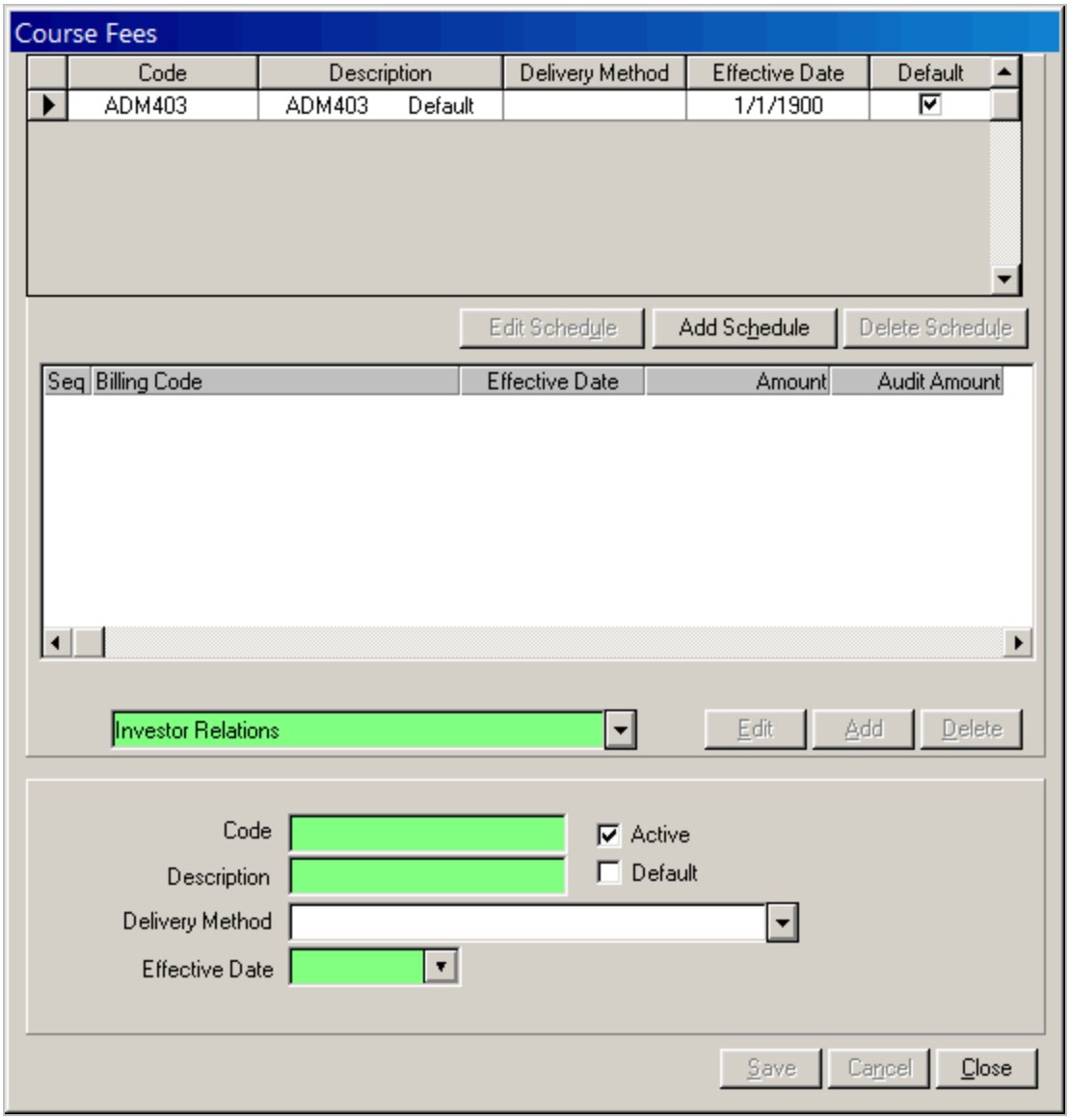
The Course Fees form is used to set up the fees students are charged when they sign up for a course. A course can have multiple fee schedules, for example, different fees for different delivery methods or effective dates.

- If you do not need multiple fee schedules, the top portion of the form contains a single default fee schedule, and the associated set of fees is shown in the middle of the form.
- If multiple fee schedules are defined, the list of fee schedules appears at the top of the form, and the fees associated with the default fee schedule appear in the middle of the form.

Prerequisite: Charge codes that can be selected on the Course Fees form must first be set up under Lists > Student Accounts > Transaction Codes.

To add or edit a course fee schedule:

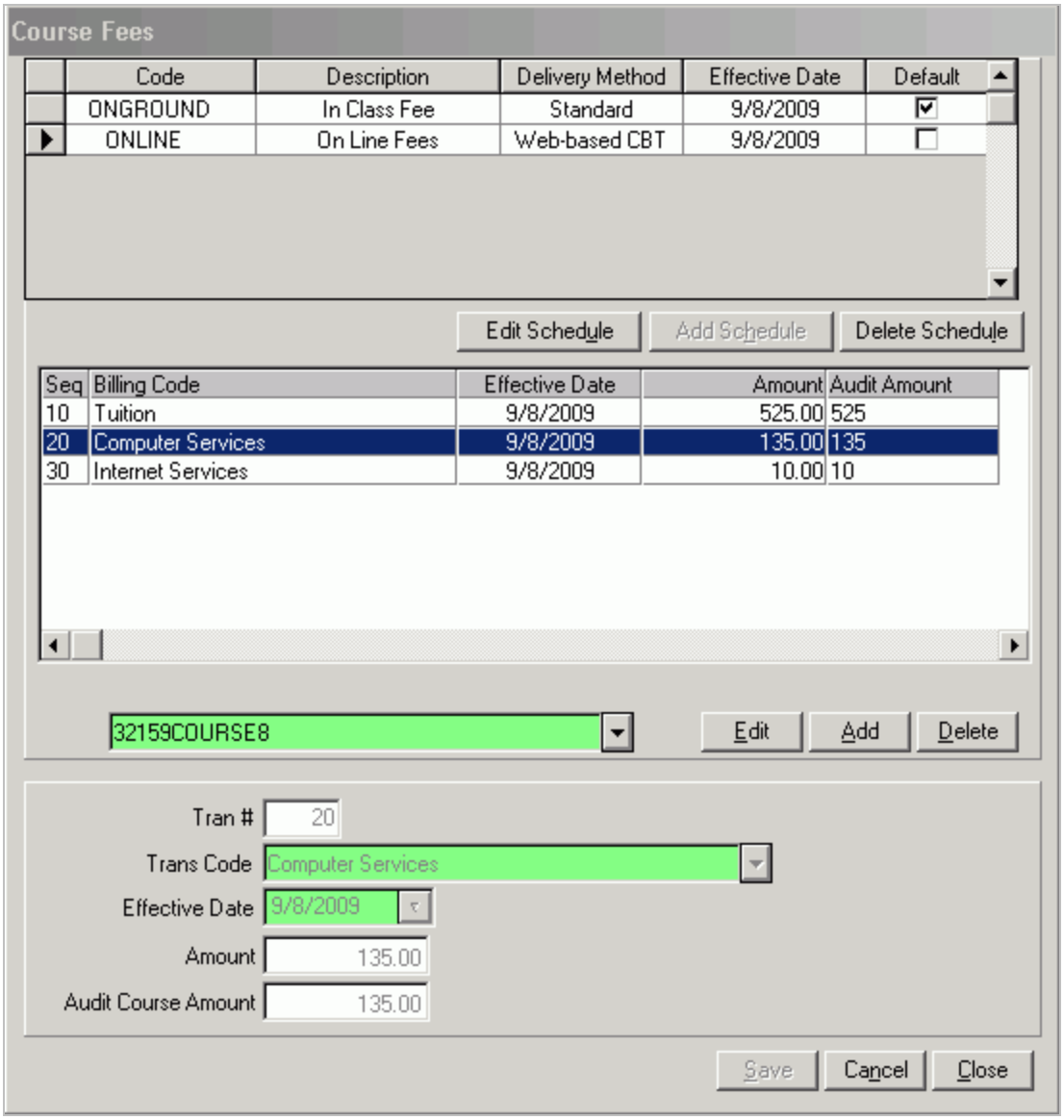
1. On the Courses Code Setup form, click the **Fees** button. The Course Fees form is displayed.



2. Click **Add Schedule**, or select on an existing fee schedule and click **Edit**.
3. Specify a unique **Code**.
4. Enter a **Description**.
5. Select a **Delivery Method**. The options are Classroom and Online.
6. Specify an **Effective Date**. This date is used in conjunction with the Student Accounts Billing Method when the method is "Bill by Course". The latest effective date for the fee is used when billing the student. The effective date is compared to the Enrollment Date or the Term Start Date, depending on which date was selected for the billing method.
7. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
8. For multiple fee schedules, select the one that will be the default and select the **Default** check box.
9. Click the **Save** button to save the fee schedule.

To add or edit the fees associated with a fee schedule:

1. Select the fee schedule to be edited.
2. Click **Add**, or select an existing charge and click **Edit**.



3. In the **Trans#** field, enter a Transaction (sequence) Number for the charge.
4. Select a **Trans Code** (Transaction Code) from the drop-down list.
5. Specify an **Amount**.
6. If the course billing method is course-based, CampusNexus Student calculates the **Audit Course Amount** for the course when taken as Audit.
7. Click **Save**.

Courses > Corequisites

Corequisites are courses that must be taken in conjunction with another course. CampusNexus Student verifies during registration that corequisite requirements are met and prevents a student from unregistering or dropping courses that are corequisites to a course in which the student is registered or currently taking. If the student wishes to drop a course that has corequisites, the student will have to drop all corequisite courses together. A student may do this when unregistering via Portal. Since CampusNexus Student does not allow unregistration or dropping of multiple courses at the same time, specific users may be given permission by the system administrator to override prerequisite and corequisite rules when registering, unregistering, or dropping student courses.

Example

An institution uses parent-child terms with the parent term having two child terms. One corequisite course is offered in Child Term 1. The second corequisite course is offered in Child Term 2. If a student is registered for the corequisite course in Child Term 1, CampusNexus Student notifies the registrar that the course is a corequisite and that the other corequisite must be completed at the same time (Child Term 1). If the administrator has override authority, the administrator may override the corequisite requirement and register the student in the course.

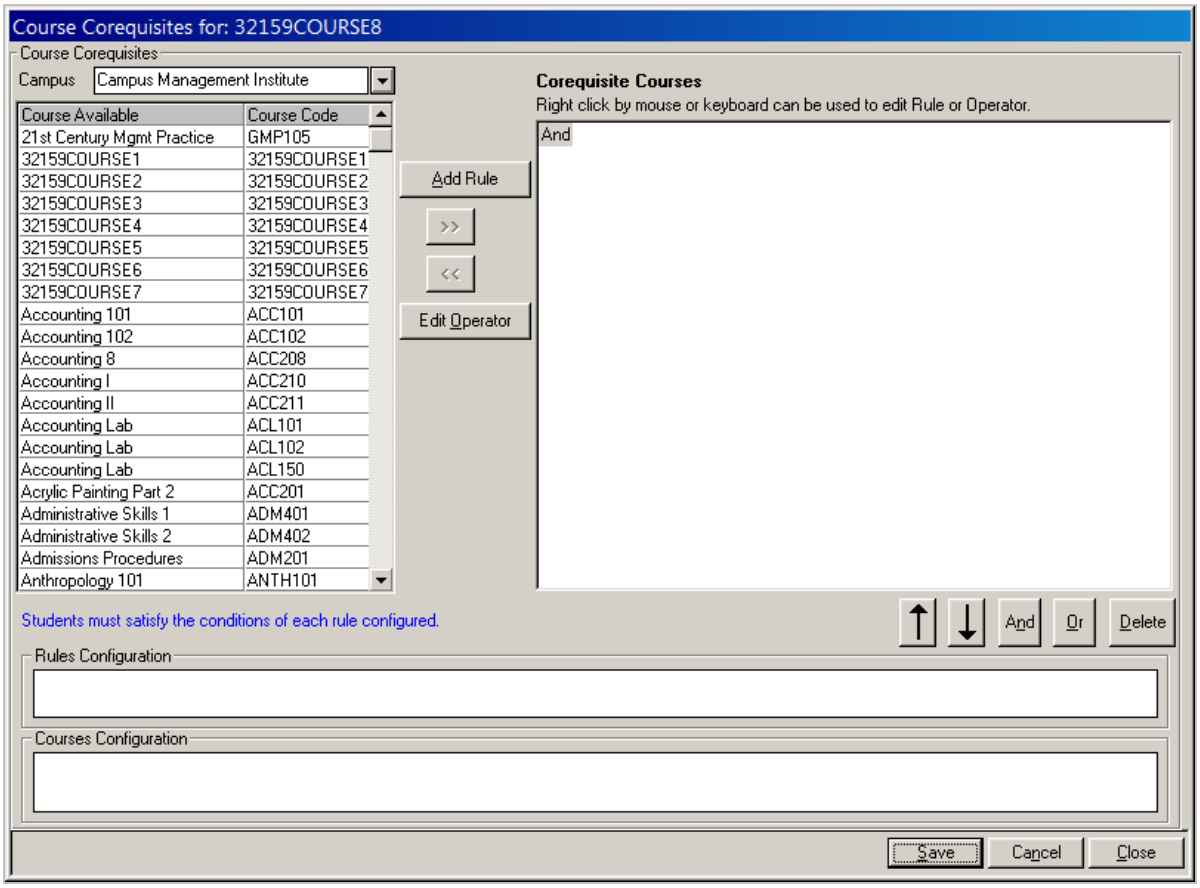
You can configure complex rules with corequisites that contain multiple conditions separated by AND and OR statements similar to the following statement:

PSY 230, Criminal Psychology
- AND -
PSY 245, Deviant Psychopathology
- OR -
SOC 260, Criminal Behavior

The corequisite rules entered on the Course Corequisite form are visible as shown in the Corequisite Courses pane to staff registering students in CampusNexus Student and students registering in Portal.

To set up corequisites for a course:

1. On the Courses Code Setup form, click the **Corequisites** button. The Course Corequisites for: <Course Name> form is displayed.



2. Determine if your corequisite rules include an AND or an OR operator.
    - If you need an OR operator (Course 1 OR Course 2), right-click on the “And” operator node in the Corequisite Courses field and select “Or”. The "And" operator is replaced with "Or".
    - If you need an AND operator (Course 1 AND Course 2), proceed to the next step.
3. Click the **Add Rule** button.

    The following message is displayed: *"How many courses are required for this rule?"*
4. Enter a number greater than 0 and click **OK**.

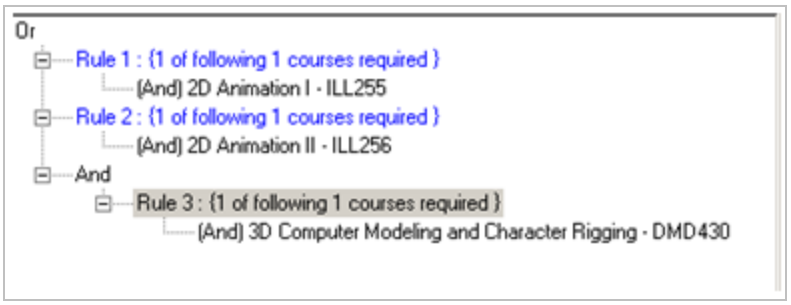
    Rule 1 is added to the operator node in the Corequisite Courses field.

    Note: The Number of Required Courses you previously entered appears at the beginning of the rule.
5. To designate a course as a corequisite, select a course in the **Course Available** list and click .

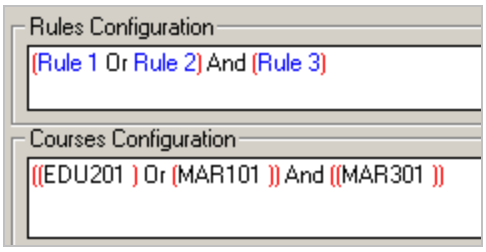
    The course is moved to the node structure in the Corequisite Courses field.
6. To create a corequisite rule with an OR operator, right-click the “And” operator node and select the “Or” operator.

    Add two rules, each one with one of the courses that can be taken to satisfy the OR condition.

7. Build the tree containing the And/Or operators and rules with required courses.



The bottom of the form contains two areas which display details of the corequisite courses being configured. The **Rules Configuration** area shows the logical relationship between each of the rules while the **Courses Configuration** area shows the relationship between the courses.



8. To change the order of rules, statements, or courses in the Corequisite Courses field, select the item and click .

9. To remove a corequisite course, select the course in the Corequisite Courses field and click .

10. To remove a rule, select the rule in the Corequisite Courses field and click **Delete**.

    A confirmation message is displayed. Click **Yes**.

11. To remove an 'And' or 'Or' operator, select the operator and click **Delete**.

    A confirmation message is displayed. Click **Yes**. All rules associated with the operator will be removed.

12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Courses > Equivalency

Equivalent courses are courses with different course numbers that institutions designate as equivalent, allowing students to take a course equivalent to a course listed in their programs, but with different course numbers, for example, ENG 101, English 101, is equivalent to LIT 101, Literature 101.

If a course code changes, you can designate that the new course code is equivalent to the old one. The GPA calculation takes into account the change in codes when processing the retaken courses for the student. The degree audit takes into consideration where the new course code fits into the student's degree requirements.

Cross-referenced Courses

Courses may be cross-referenced using the Equivalency form. Cross-referenced are course sections that a sponsoring campus can offer to students from other campuses. The sponsoring campus determines which other campuses can offer the course and when students can register into the course sections. This function, called Cross Registration Sharing Groups, is set up system-wide under Setup > Academic Records > Settings (tab) > Student Registration. CampusNexus Student records the course number that the student registers into and the original course required by the student's program.

Once a course has been cross-referenced with another campus, the academic administrators at the campuses the course is cross-referenced to can view and register the students into the cross-referenced course. Academic administrators at the campuses to which the course is cross-referenced do not have change to their own campuses schedule to register their students in to the course. Only students in campuses that the course is cross-referenced to can enroll in the cross-referenced courses.

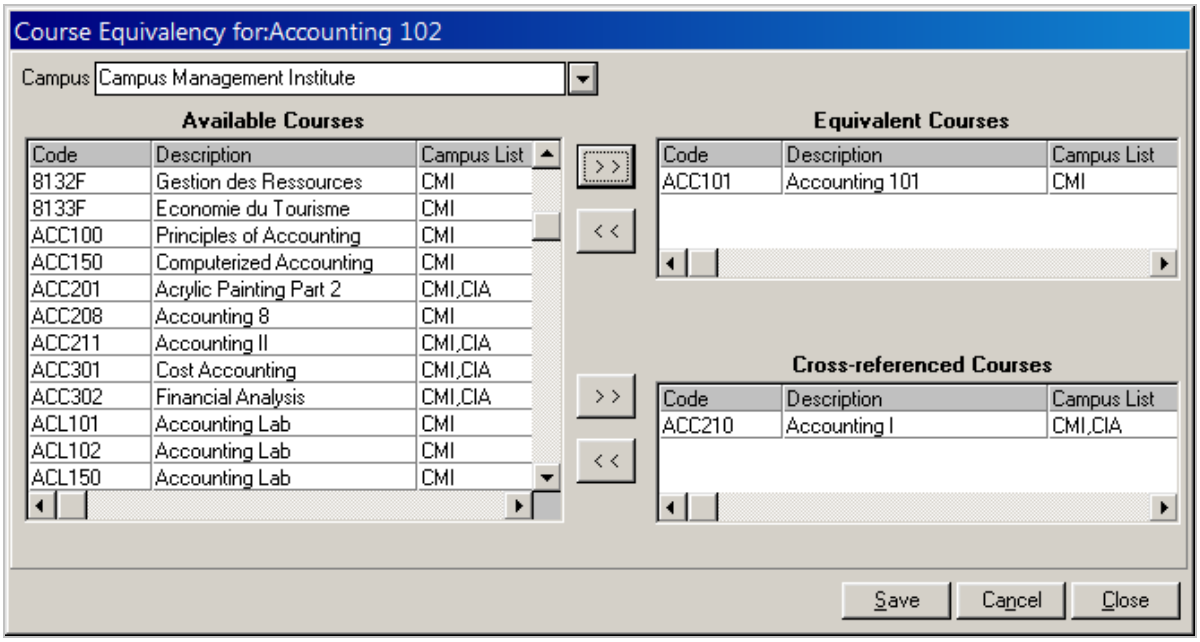
Several student forms and documents display the cross-referenced course that the student actually registers into but also reference the original course required by the student's program. These forms and documents include:

- Schedule
- Final Grades
- Degree Audit
- Report Card
- Transcript

Note: CampusNexus Student does not allow a course to be equivalent and cross-referenced at the same time.

To select equivalent or cross-referenced courses:

1. On the Courses Code Setup form, click the **Equivalency** button. The Course Equivalency for <Course Name> form is displayed.



2. To set up an equivalent course, select a course in the **Available Courses** list, and click >> next to the Equivalent Courses field. The course is moved to the Equivalent Courses field. The grid displays the campuses associated with the course.

3. To set up a cross-referenced course, select a course in the **Available Courses** list, and click >> next to the Cross-referenced Courses field. The course is moved to the Cross-referenced Courses field. The grid displays the campuses associated with the course.

4. To remove an equivalent course or a cross-referenced course, select the course, and click <<. The course is returned to the Available Courses list.

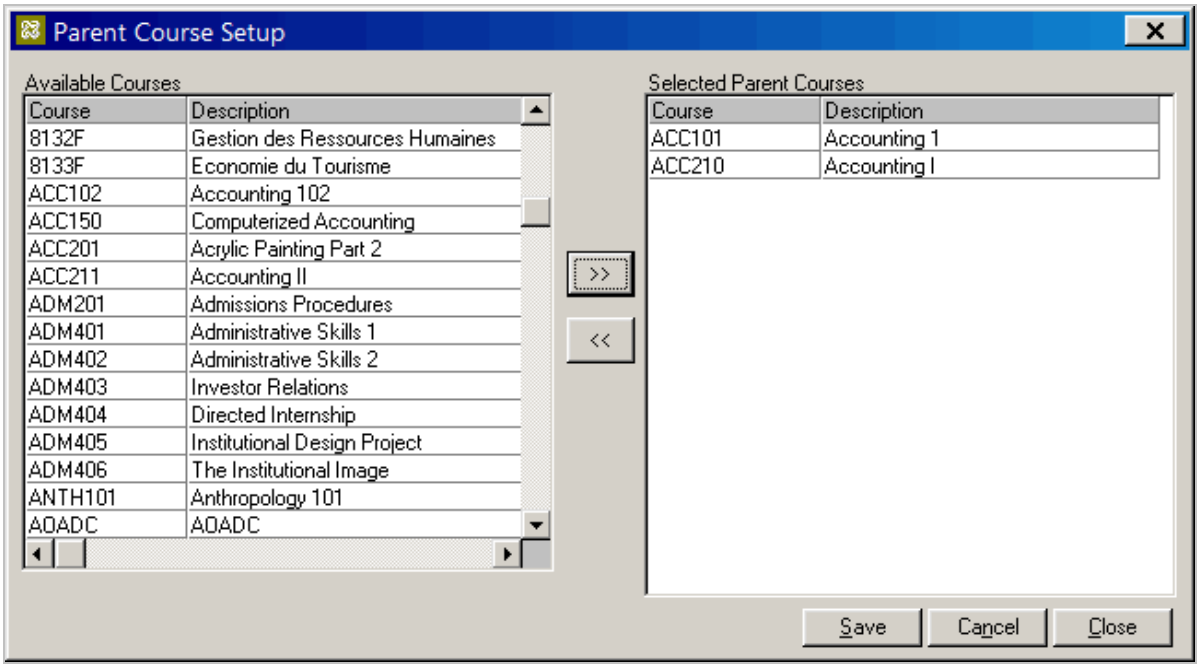
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Parent Course Setup

When a course is designated as a dependent course on the Courses Code Setup form, you can select associated parent courses. A dependent course can have one or more parent courses. A parent course can have only one dependent course.

To select one or more parent courses:

1. On the Courses Code Setup form, select the **Dependent** check box, and click the **Parent** button. The Parent Course Setup form is displayed. The Available Courses list displays all active parent courses.



2. In the **Available Courses** list, double-click a parent course, or select a parent course and click >>. The selected course is moved to the Selected Parent Courses list. Repeat this step to select additional parent courses.

   To undo your selection, double-click a course in the Selected Parent Courses list.

3. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Courses > Prerequisites

Prerequisites are courses that must be completed before taking another course. A course may have one or more prerequisites. When checking prerequisite requirements, CampusNexus Student verifies that the section end date of the prerequisite course is in the past when compared to the section start date of the course that has the prerequisite requirement. During registration CampusNexus Student verifies that the prerequisites are met and prevents a student from unregistering or dropping courses that are prerequisites to a course in which the student is registered or the student is currently taking. Specific users may be given permission by the system administrator to override prerequisite rules when registering, unregistering, or dropping student courses.

A prerequisite course can have a minimum grade point requirement and other non-course prerequisites such as:

- Minimum credits earned or hours taken. Credits/hours must be completed before the start date of the course the student is attempting to register for.
- A minimum Financial Aid Academic Year Level (e.g., Junior or Senior).
- Completion of one or more tests with at least a specified minimum test score.

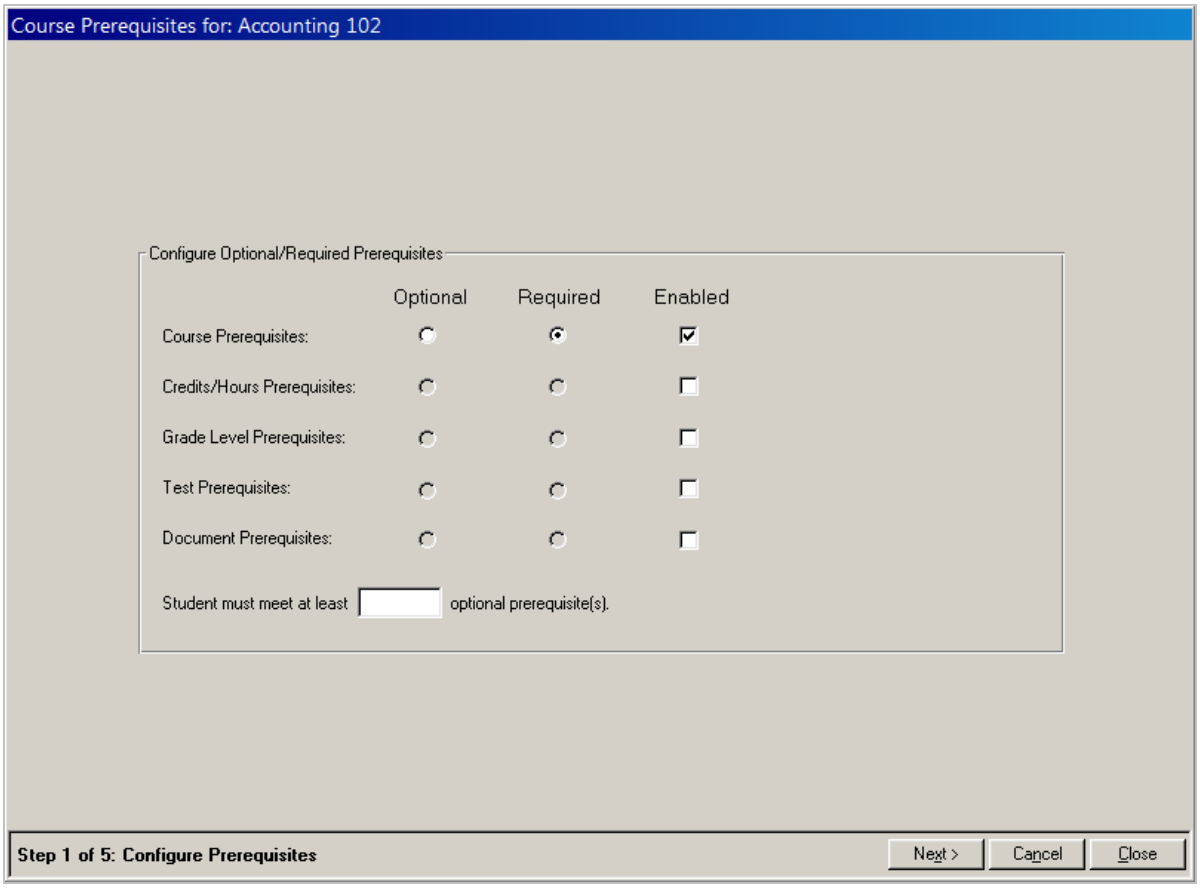
You can configure complex rules with prerequisites that contain multiple conditions separated by AND and OR statements similar to the following statement:

> HCE 110, Introduction to Pharmacology, with a grade of 'C' or higher
> - OR -
> HCE 111, Information Literacy and Health Care, with a grade point of '2.00' or higher, and Credit, with a grade point of '2.00' or higher
> - AND -
> BIO 260, Human Anatomy and Physiology, and Credit with a grade of '2.00' or higher

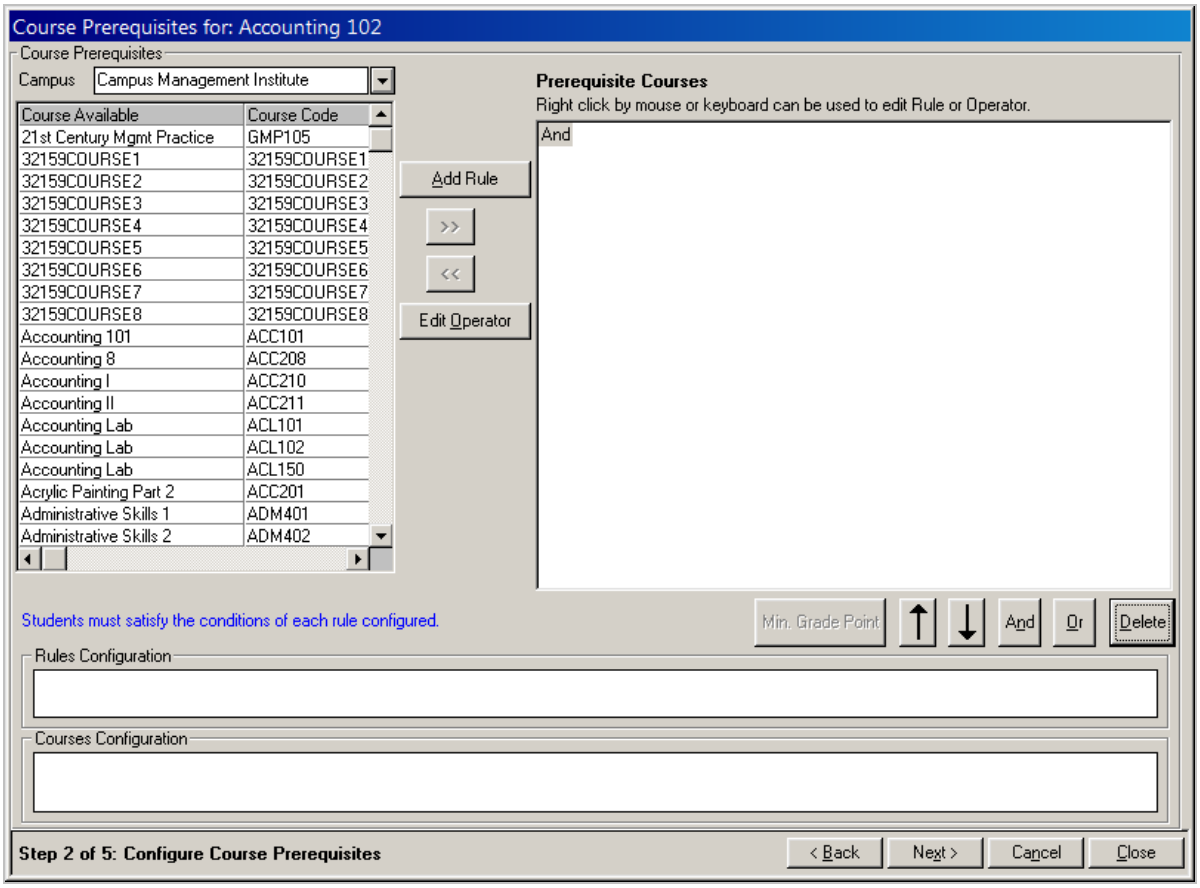
The prerequisite rules entered on the Course Prerequisite form are visible as shown in the Prerequisite Courses pane to staff registering students in CampusNexus Student and students registering in Portal.

To set up prerequisites for a course:

1. On the Courses Code Setup form, click the **Prerequisites** button. Step 1 of the Course Prerequisites for: <Course Name> form is displayed.



2. To enable a prerequisite, selected the **Enabled** check box on the row corresponding to the desired prerequisite. The **Optional** and **Required** options are enabled.
3. The **Required** option is selected by default. Click **Optional** if the prerequisite is optional.
4. Enter a number in the **Student must meet at least __ optional prerequisite(s)** field if the course requirements specify a number of minimum optional prerequisites.
5. Click **Next** to proceed.



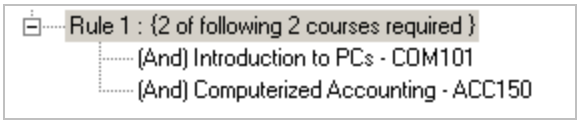
6. Determine if your rules include an AND operator or an OR operator.
   - If you need an OR operator (Course 1 OR Course 2), right-click on the “And” operator node in the Prerequisite Courses field and select “Or”. The "And" operator is replaced with "Or".
   - If you need an AND operator (Course 1 AND Course 2), proceed to the next step.
7. Click the **Add Rule** button.

   The following message is displayed: *"How many courses are required for this rule?"*
8. Enter a number greater than 0 and click **OK**. If a course has only a single prerequisite course, enter 1.

   Rule 1 is added to the operator node in the Prerequisite Courses field.

   Note: The Number of Required Courses you previously entered appears at the beginning of the rule.
9. To designate a course as a prerequisite, select a course in the **Course Available** list and click .

   The course is moved to the node structure in the Prerequisite Courses field.

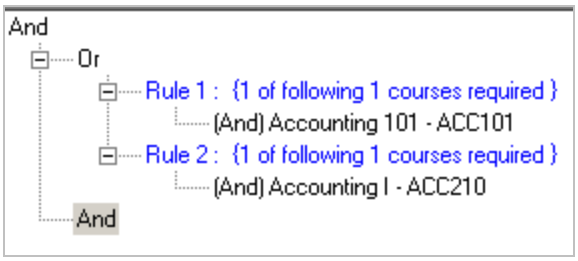


Note: A course may only appear in a rule once, but the same course may appear in different rules.

10. To create a prerequisite rule with an OR operator, right-click the “And” operator node and select the “Or” operator.

    Add two rules, each one with one of the courses that can be taken to satisfy the OR condition.

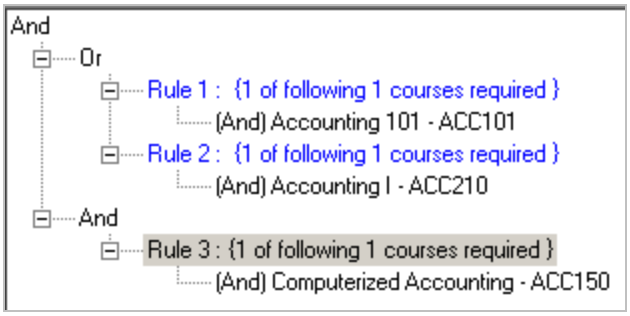
11. To add an operator, click on an existing operator and click one of the **And** or **Or** buttons. In most cases you will click on the existing 'And' operator in the Prerequisite Courses field. As you build the rules, a tree structure representing the rules and the prerequisite requirements is built.



Note: The rules below and to the right of an operator are the ones that will be affected by the operator. For example in the image above, Rule 1 and Rule 2 are connected by the OR operator so that Accounting 101 OR Accounting I will fulfill the requirement.

12. To add a rule, ensure that the operator in which the rule belongs is highlighted and click the **Add Rule** button. Each time you add a rule, you are prompted for the number of courses required for the rule. Enter a number and click **OK**.

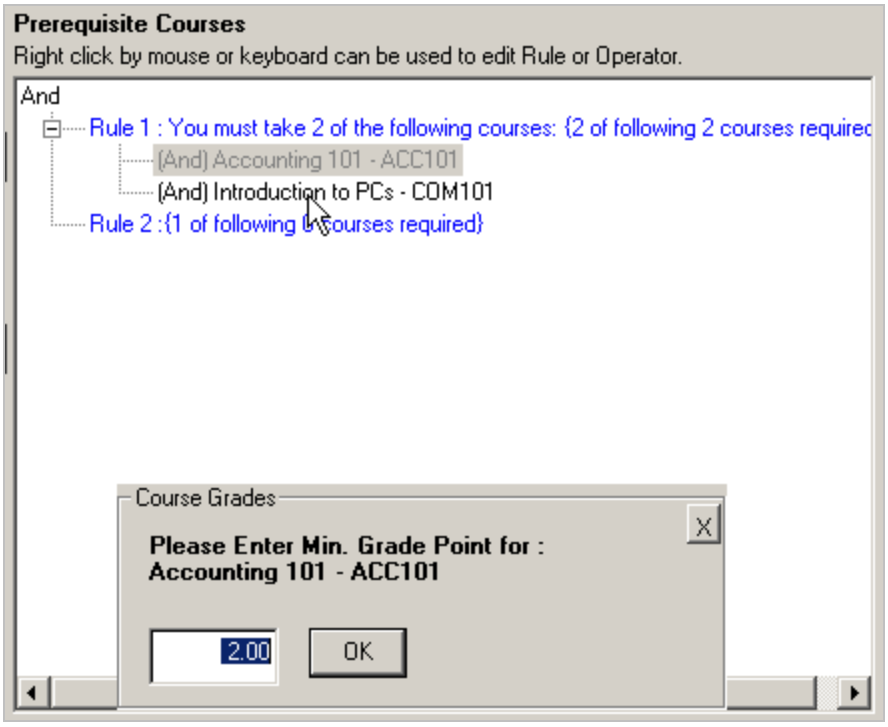
13. Build the tree containing the And/Or operators and rules with required courses.



14. To remove a prerequisite course, select the course in the Prerequisite Courses field and click .

15. If a prerequisite course within a rule requires a minimum Grade Point Requirement, select the prerequisite course in

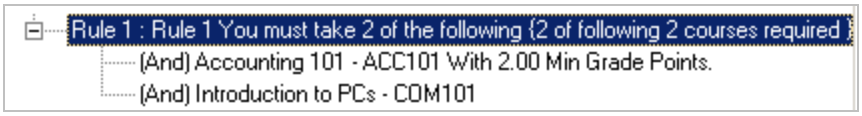
the node tree and click the **Min Grade Point** button.



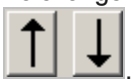
16. Specify the Minimum Grade Point (5 digits including 2 decimal positions) for the selected course and click **OK**.

    The Minimum Grade Point is displayed in the rule.

17. The text containing the rule is displayed when the prerequisites are viewed by staff during registration or students registering on Portal. To modify the text, select the rule to be edited and click **Edit Rule**. Enter the desired text after the colon located after the Rule # and before the text in the braces.



    Note: The generated text in between the braces remains after you have performed the edit.

18. To change the order of rules, statements, or courses in the Prerequisite Courses field, select the item and click  .

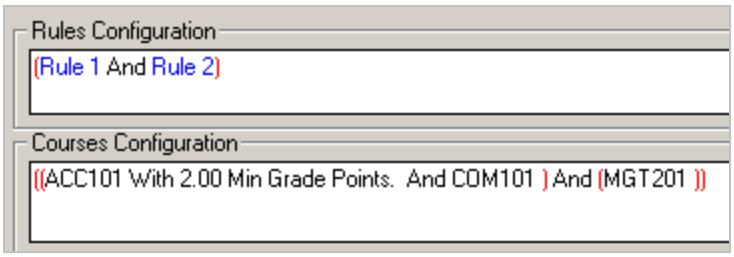
19. To remove a rule, select the rule in the Prerequisite Courses field and click **Delete**.

    A confirmation message is displayed. Click **Yes**.

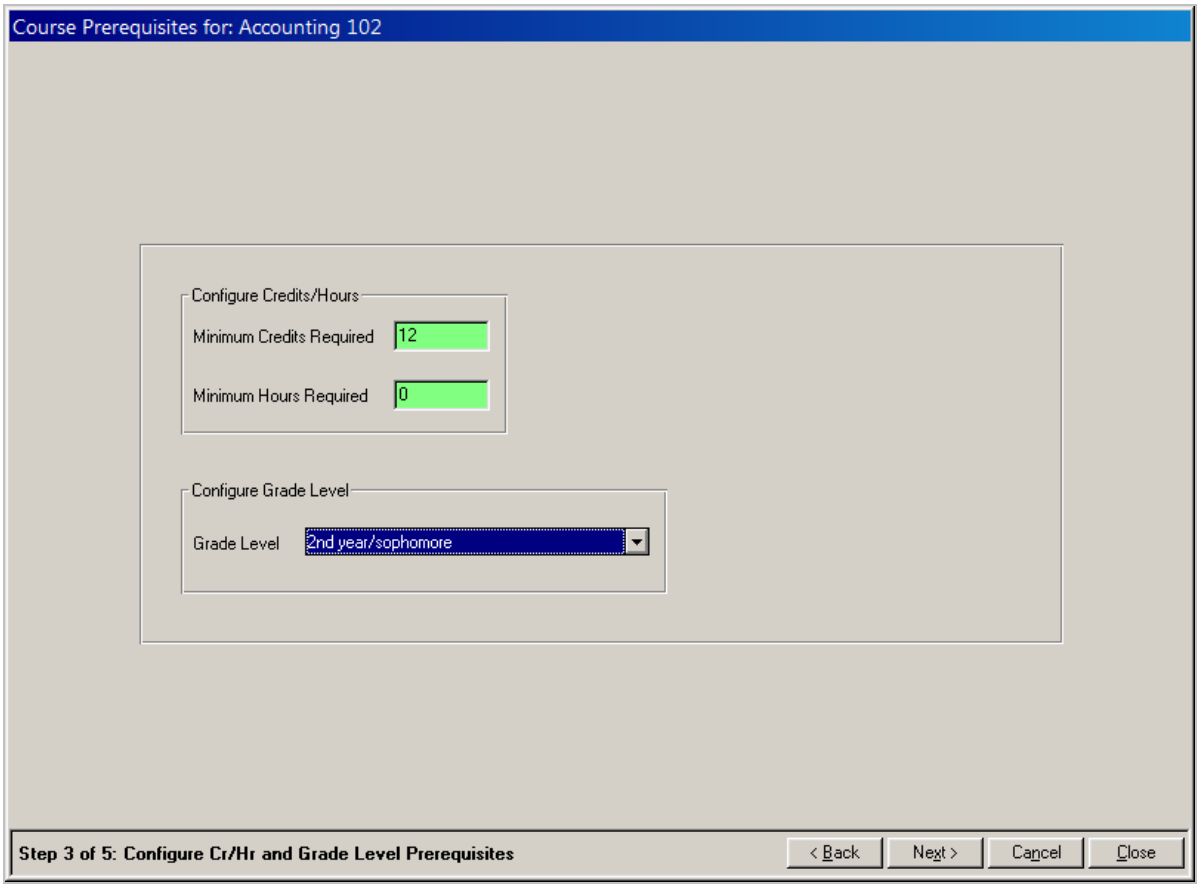
20. To remove an 'And' or 'Or' operator, select the operator and click **Delete**.

    A confirmation message is displayed. Click **Yes**. All rules associated with the operator are removed.

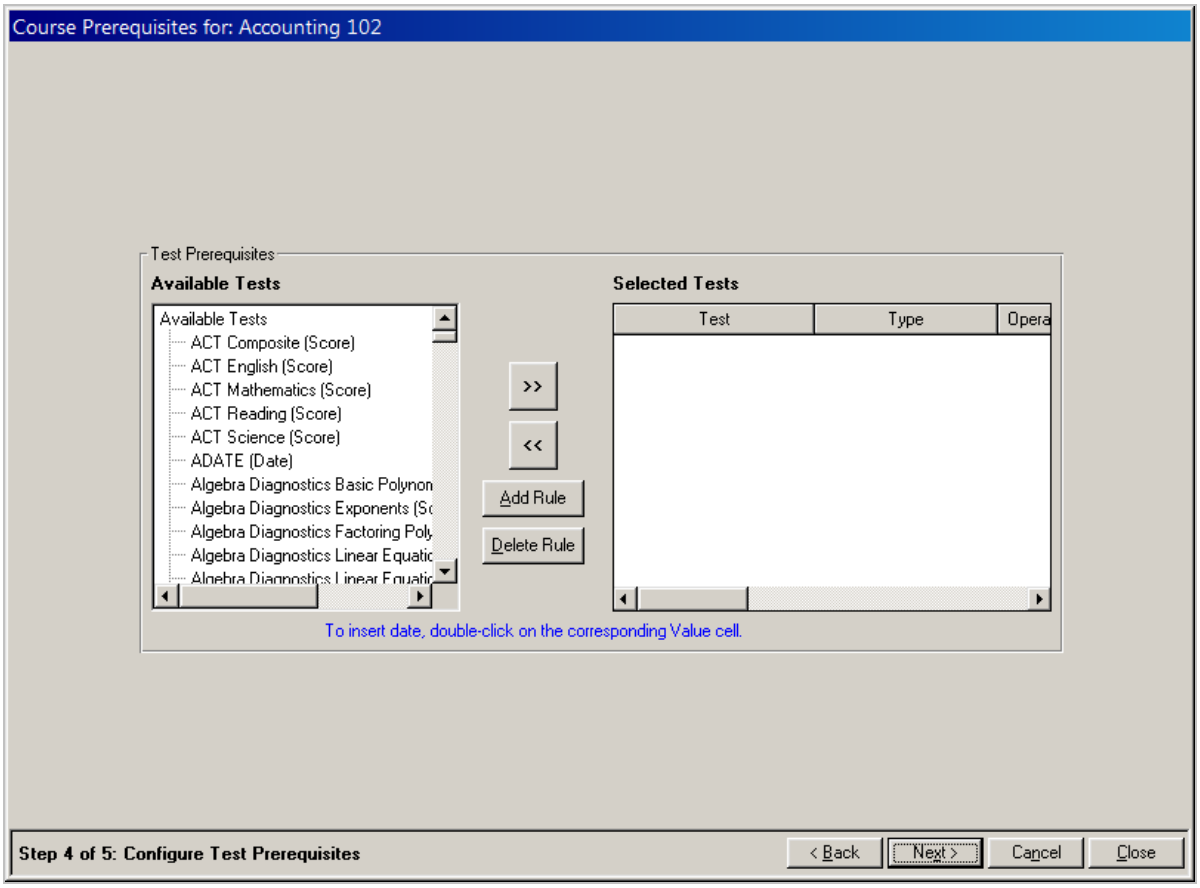
21. The bottom of the form contains two areas which display details of the prerequisite courses being configured. The **Rules Configuration** area shows the logical relationship between each of the rules, while the **Courses Configuration** area shows the relationship between the courses. These areas are not editable, but the text may be copied for inclusion in other applications.



22. Click **Next** to proceed.



23. If there is a prerequisite for credits, hours, or grade level, specify the values.
    a. Specify **Minimum Credits Required** or **Minimum Hours Required**.
    b. Specify **Minimum Hours Required**.
    c. Select the **Grade Level**.
24. Click **Next** to proceed.



25. If test prerequisites are required, add a rule, and specify the minimum test scores.

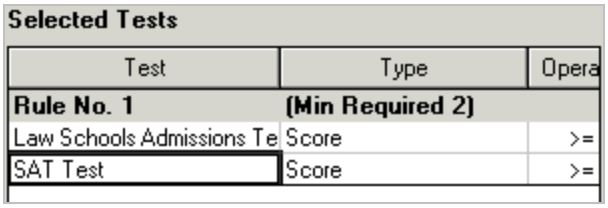
    a. To add a rule, click the **Add Rule** button.

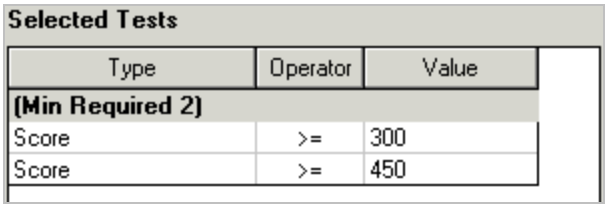
    The following message is displayed: *How many tests are required for this rule?*

    b. Enter a number greater than 0 and click **OK**.

    c. To add a test to the rule, select a test and click .

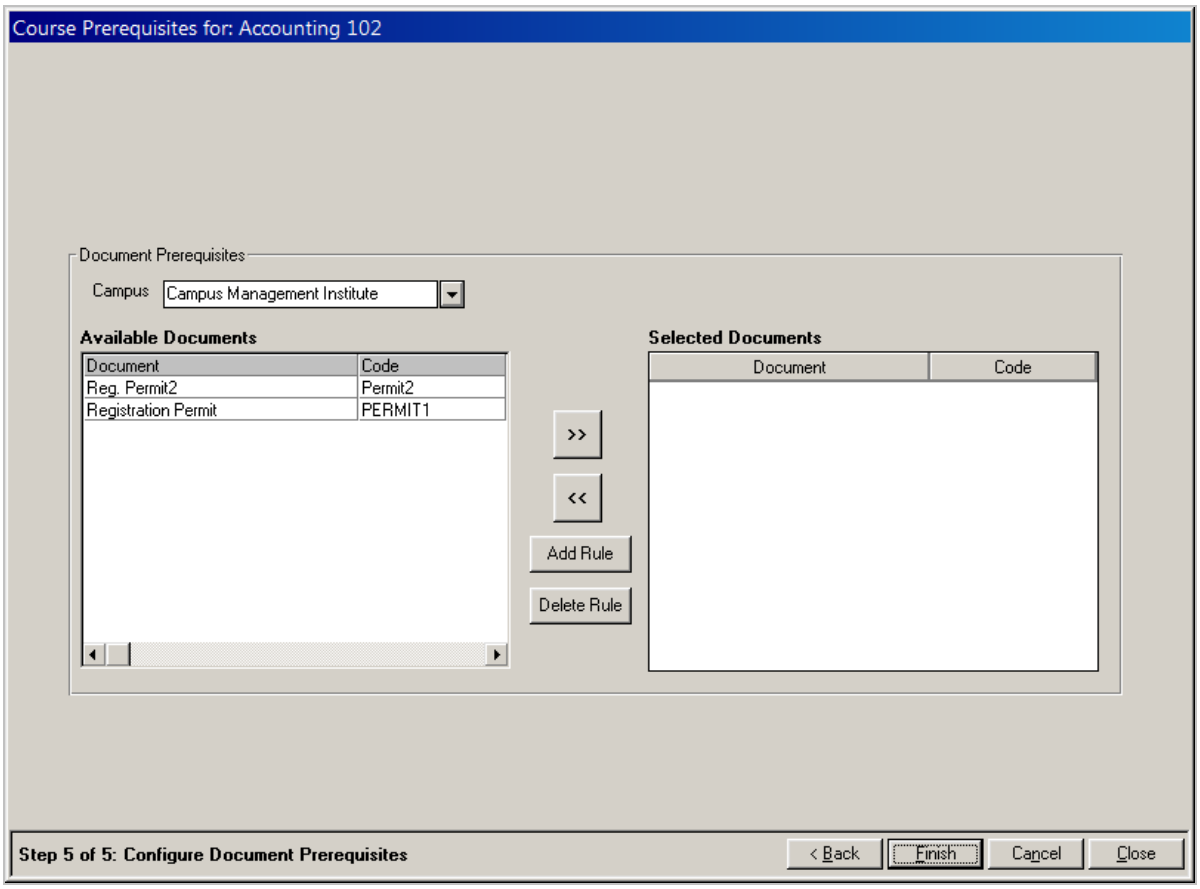
    d. For each test selected, enter a minimum score on the right side of the Selected Tests grid. Move to the right side of the grid to specify the minimum test **Value**.





e. Use the **Add Rule** and **Delete Rule** buttons to add or remove rules for test prerequisites.

26. Click **Next** to proceed.



27. If prerequisite documents are required for a course, add a rule and associate one or more documents with the rule.

    a. Select a **Campus**. The campus drop-down is populated from the selected limit on the Courses Code Setup form.

    b. Click the **Add Rule** button.

    The following message is displayed: *How many Documents are required for this rule?*

    c. Enter a number greater than 0 and click **OK**.

    d. To add a document to the rule, select a document and click .

Note: Add as many documents as needed, but the same document can only be added once for a specific rule.

e. Use the **Add Rule** and **Delete Rule** buttons to add or remove rules for Document Prerequisites.

28. Click **Finish** to save the Prerequisites and return to the Courses Code Setup form.

Courses > Course Resources

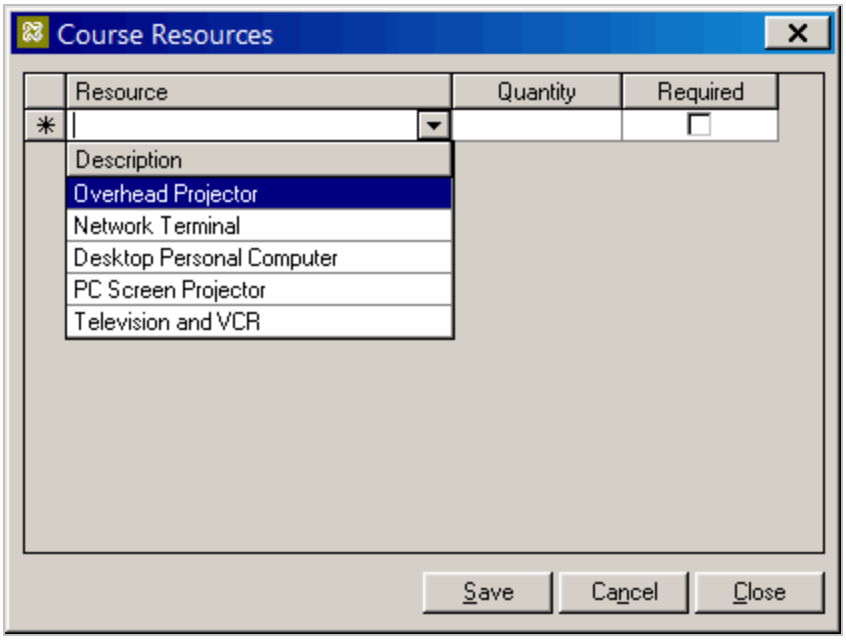
Use the Course Resources form to list the resources required or requested for teaching a course.

Cross-listed courses are courses where two different course sections are using the same instructional resource, for example, sharing the same faculty member, or using the same room at the same time. You can associate both course sections by cross-listing them to the instructional resource.

Prerequisite: Resources codes must be set up under Lists > Academic Records > Resources before they can be assigned to a course.

To select the resources for a course:

1. On the Courses Code Setup form, click the **Resources** button. The Course Resources form is displayed.



2. Click in the **Resource** field and select a resource.
3. Specify the number of resource units in the **Quantity** field.
4. Select or clear the **Required** check box to indicate that the resource is absolutely necessary or just nice-to-have.
5. Add more resources if needed.
6. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

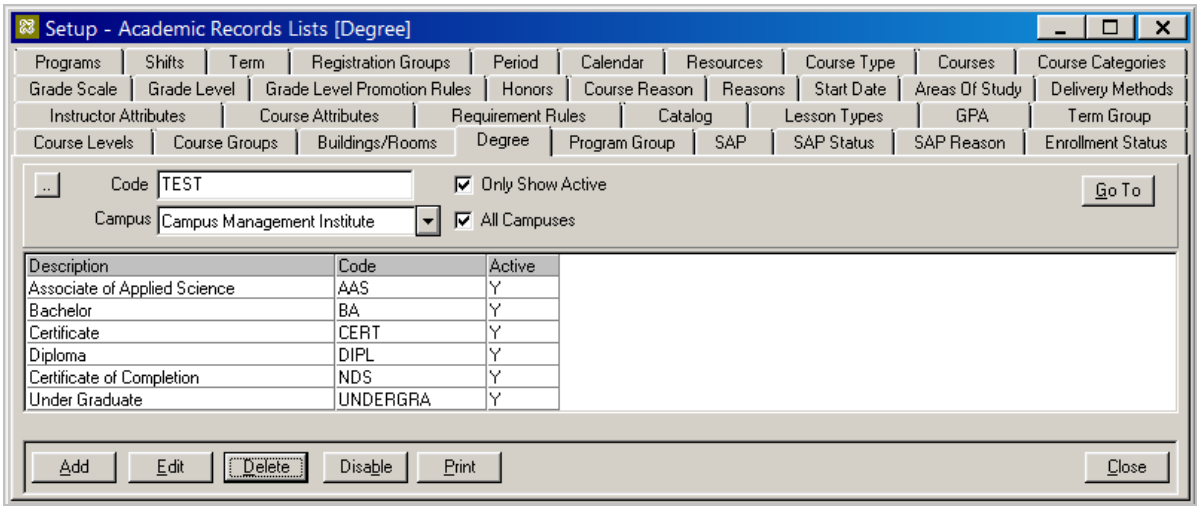
Setup - Academic Records Lists [Degree]

Use the Setup - Academic Records Lists [Degree] form to list descriptions and codes of the degrees, diplomas, and certificates offered by your institution. Each degree can be associated with all campuses or with a campus group. A degree code is related to each program version in the programs list.

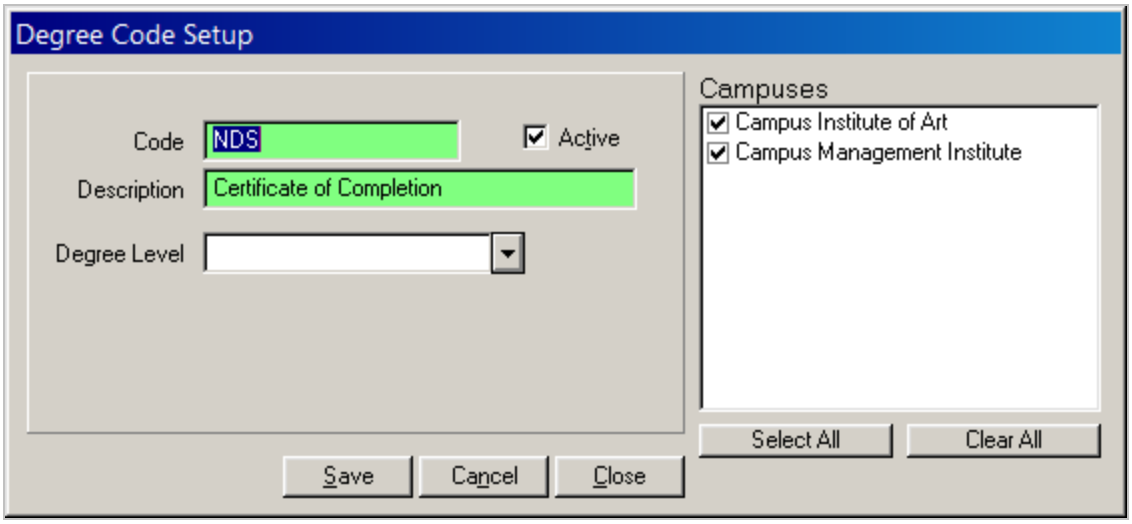
Note: A degree code cannot be deleted if it has been assigned to a program version.

To add or edit a list of degree codes:

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Degree**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Degree Code Setup form is displayed.



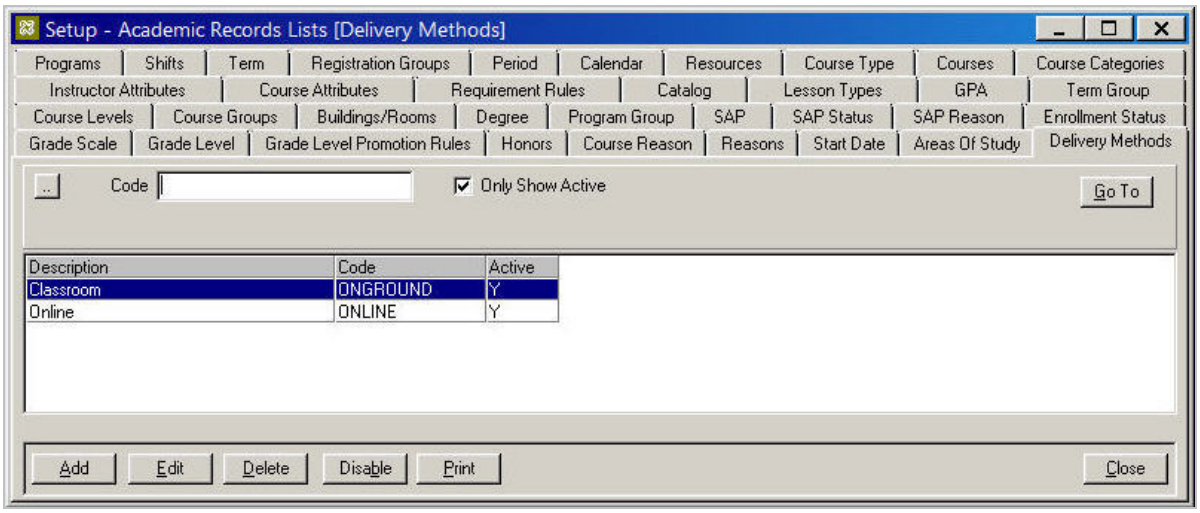
7. Specify a unique **Code**.
8. Enter a **Description**.
9. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
10. Select a **Degree Level** (* = Graduate Level Degree):
    - Undergraduate (nonGE)
    - Graduate (nonGE)*
    - Professional (nonGE)*
    - Undergraduate Certificate
    - Associate's Degree
    - Bachelor's Degree
    - Post-baccalaureate Certificate
    - Master's Degree*
    - Post-master Certificate*
    - Doctor - Research/Scholarship*
    - Doctor - Professional Practice*
    - Doctor - Other *
    - First-professional Degree*
    - Graduate/professional certificate
    - Non-credential programs
11. Select one or more **Campuses**.
12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Academic Records Lists [Delivery Methods]

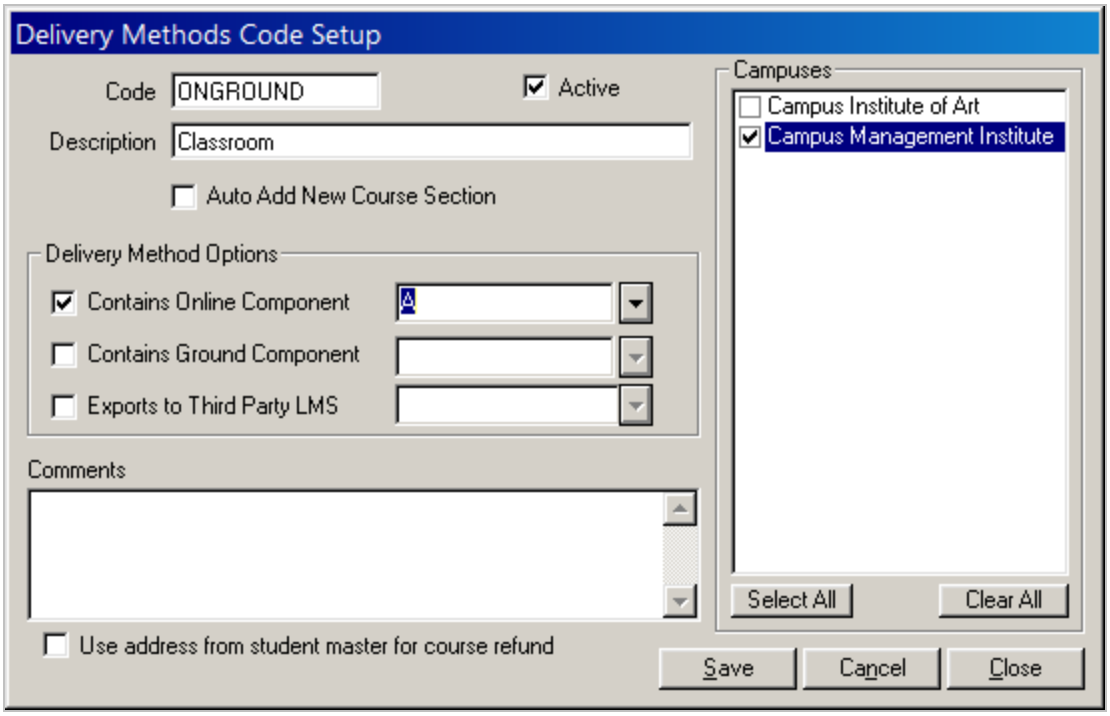
Use the Setup - Academic Records Lists [Delivery Methods] form to create a list of delivery methods for the courses offered by your institution.

To add or edit a list of delivery method codes:

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed. .
2. Select the applicable **tab**, or click the **Go To** button, click and select **Delivery Methods**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Delivery Methods Code Setup form is displayed.



6. Specify a unique **Code**.
7. Enter a **Description**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Select one or more **Campuses**.

   When defining the delivery method for a class section, the Section Delivery Method list displays only delivery methods associated with the campus where the course is scheduled.
10. Select **Auto Add New Course Section** if your campus is configured to add course sections automatically. For more information, see Auto Add Course Section Setup.
11. Select applicable Delivery Method Options.

    - If the course contains an online component, select the **Contains Online Component** check box and select one of the following options:

      - **A** if the class meets at asynchronous times (students attend or log into the class resources at their convenience at various times).
      - **S** if the class meets at synchronous times (all students attend or log in at specific times).

      See Auto Add New Course Section to determine if your institution needs to implement this feature for online courses. An 'A' value in the Contains Online Component field is required for this feature. See also Attendance Rules and Student Specific Meeting Schedule for online courses.

      Note: Enabling an online component causes an icon to appear on the registration forms for students registering via Portal. Text typed into the Comments field is displayed in the Portal tool tip for the selected class.

    - If the course has a ground component, select the **Contains Ground Component** check box and select one

of the following options:

- **A** if the class meets at asynchronous times (students attend or log into the class resources at their convenience at various times).
- **S** if the class meets at synchronous times (all students attend or log in at specific times).

- Select the **Exports to Third Party LMS** check box if the associated course exports can be exported to an external Learning Management System (LMS).

12. Enter any comments in the **Comment** field.
13. Select **Use address from student master for course refunds** if the course refund policy is to be determined on the basis of the student's state of residence rather than the state where the course is offered.

    Note: If this options is selected, all states must be assigned to a policy for a refund to be calculated. If a Student Master has a state that is not configured, no Refund Policy is used for calculations.

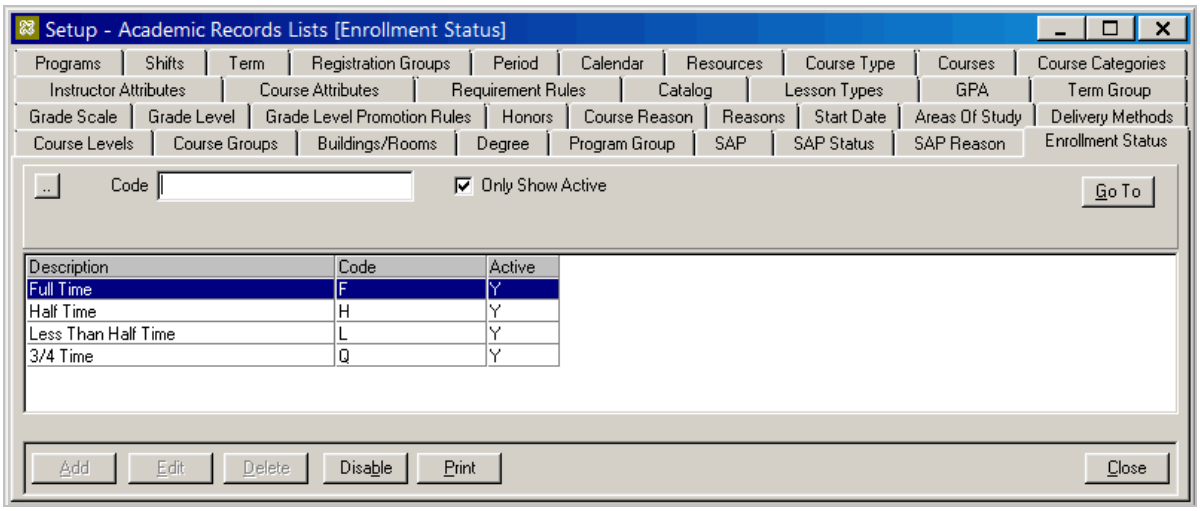
14. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Academic Records Lists [Enrollment Status]

The Setup - Academic Records Lists [Enrollment Status] form lists the standard enrollment statuses defined by the Department of Education. You cannot add or edit these statuses. You can use the disable/enable and print functions.

To disable or enable enrollment status codes:

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Enrollment Status**.



3. Select **Only Show Active** to view only active records. Clear this check box to view all records.
4. Select a list item and click **Disable**. The Active column for the selected list item changes from 'Y' (yes) to 'N' (no). The Disable button changes to Enable.
5. Select a list item and click **Enable**. The Active column changes to 'Y'. The Enable button changes to Disable.
6. Click **Close** to close the form.

Setup - Academic Records Lists [GPA]

CampusNexus Student provides a list of system-defined Grade Point Averages (GPAs). The system GPAs only allow editing of the decimal settings (up to five places).

You can add school-defined or non-system GPAs (for example, an Honors GPA that includes grades from previous institutions or a HOPE Scholarship GPA for State reporting). When GPAs are added, by default CampusNexus Student calculates each new GPA cumulatively, with the ability to calculate the new GPAs by term. You can configure options for designating campus, retake methodology, weighting, which types of courses are included in the calculation of each newly created GPA, and where the new GPAs are displayed in CampusNexus Student.

GPA Calculation

The GPA calculation appears on many forms and reports and comprises important information regarding the student's progress.

The student's GPA may not be included in the GPA calculation if the Include in GPA flag is disabled for the letter grade assigned to the grade scale. See also Satisfactory Academic Progress (SAP) calculation.

GPA Calculation for Parent and Child Terms

GPAs are calculated for parent terms. Current GPAs for the parent term include all courses taken for the related child terms. Cumulative GPAs for the parent term are the same as the cumulative GPA of the last related child term.

The parent term GPAs are not printed on the transcript. The parent term GPAs are only visible on the Term Summary tab of the Enrollment form.

If a student is registered in a child term, all courses for the student should be in a child term and not in the child's parent term. The GPA calculation will not work correctly if there are courses in both the parent term and the child term of the parent term.

If a student is registered into CHILD SUMMER1 and CHILD SUMMER2, and also needs to take a third course that spans the entire summer, a third child term should be set up.

Example

- P2014SUMMER - Parent 2014 Summer Term (06/02/2014 thru 08/15/2014)

Child Terms (used for registration):

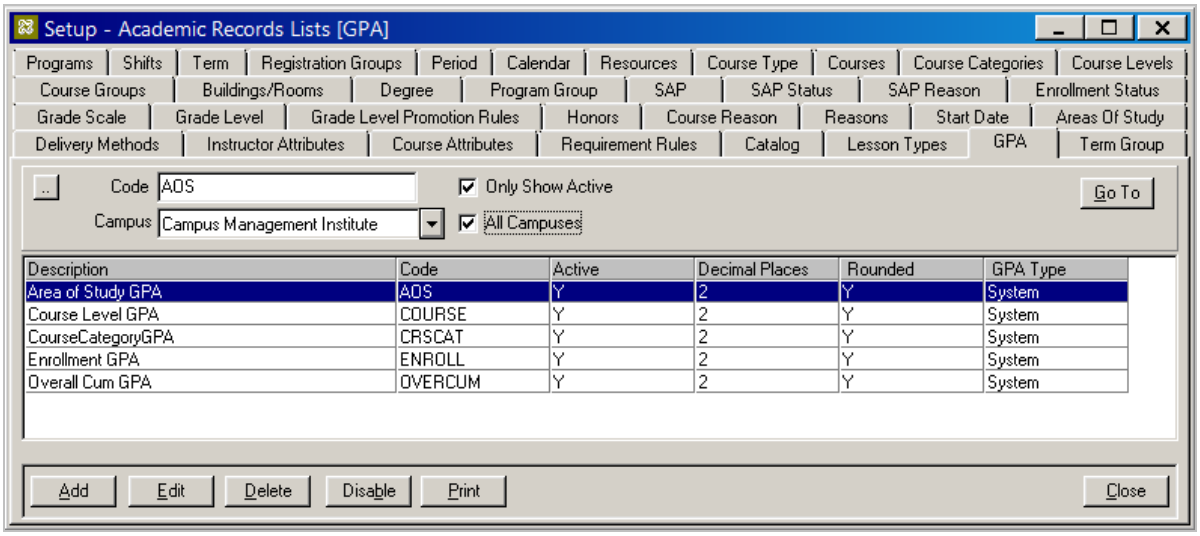
- C2014SUM1 – Child 1 (06/02/2014 thru 07/10/2014)
- C2014SUM2 – Child 2 (07/13/2014 thru 08/15/2014)
- C2014SUM_ALL – Child 3 (06/02/2014 thru 08/15/2014)

Child term C2014SUM_ALL needs to be set up if schedules are set up for the full length of the Parent 2014 Summer Term. Courses should not be scheduled or registered into the parent term:

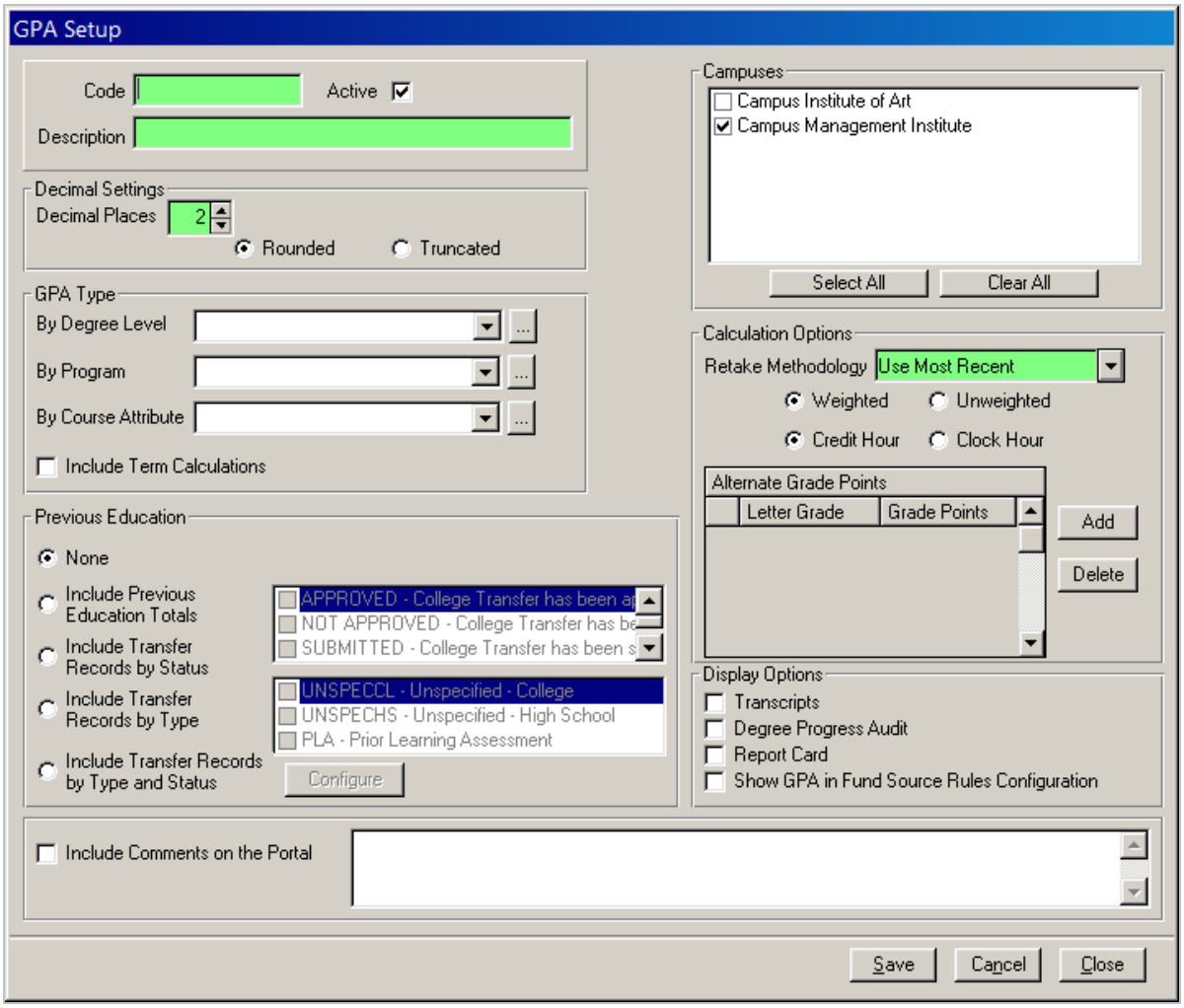
Note: The Term Relationships feature does not prevent registration into both a parent term and a parent's child term, but this scenario is not supported. If this is done, the GPA calculation will be inaccurate.

To add school-defined GPA codes:

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **GPA**.



3. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**. The GPA Setup form is displayed.



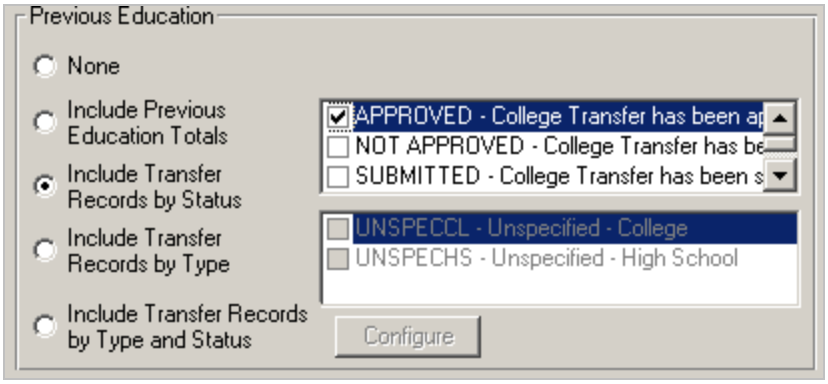
7. Specify appropriate options. See Field Descriptions.
8. Click **Save**. . A confirmation message is displayed. Another message informs you that the GPA calculations can take some time because CampusNexus Student gathers all active, enrolled, and temporary out students that meet the GPA criteria and passes them into an asynchronous queue for calculation.
9. Click **Close** to close the form. You are returned to the Setup Academic Records List form.

Repeat these steps until you have defined all your additional GPAs.

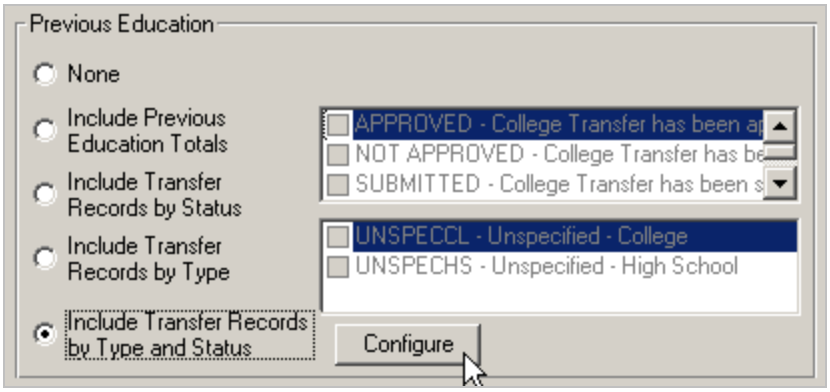
Field Descriptions

Field	Description
Code	Specify a unique **Code**.
Active	Select or clear the **Active** check box to designate the record as active or inactive, respectively. **Note**: When the Active flag is selected, the GPA is applied to all active, temporary out, future starts, and new enrollments. Inactive GPAs continue to be calculated for students who have a version start date less than the date the GPA became inactive. If the version start date and the date the GPA became inactive are equal, the deactivated additional GPA is not calculated for the student.

Field	Description
Description	Enter a **Description**.
Campuses	Select one or more **Campuses**.
Decimal Settings	Select the number of decimal places. Decimal places range from 0 to 5; by default rounding is with 2 decimal places. Select whether the GPA is to be **Rounded** or **Truncated**.
GPA Type	The GPA Type settings determine which courses are included in the GPA calculation by default. Select at least one of the following options: • **By Degree Level** - Courses from all enrollments with a specific degree level (multi-selectable option) • **By Program** - Courses from all enrollments that are common to a specific program (multi-selectable option; populated from a program, not a program version list; includes active and inactive programs) • **By Course Attribute** - Courses from all enrollments that share a specific course attribute **Note**: The GPA Type options are all multi-selectable . Within each one they function as an OR operator. For example, if Undergraduate and Graduate are selected for Degree Level, the school-defined GPA includes undergraduate OR graduate courses. However, amongst all three options they function as an AND operator. For example, if Undergraduate is selected for Degree Level and College of Liberal Arts is selected for Program, and Accounting is selected for Course Attribute, the new school-defined additional GPA includes only undergraduate courses from the Degree Level AND all courses from the College of Liberal Arts Program AND all courses that have the Accounting Course Attribute. • **Include Term Calculations** - The GPA calculations are broken down by term similar to the way the Term Summary works for system GPAs. Each term displays the term's GPA and the cumulative GPA as of the end of the term.

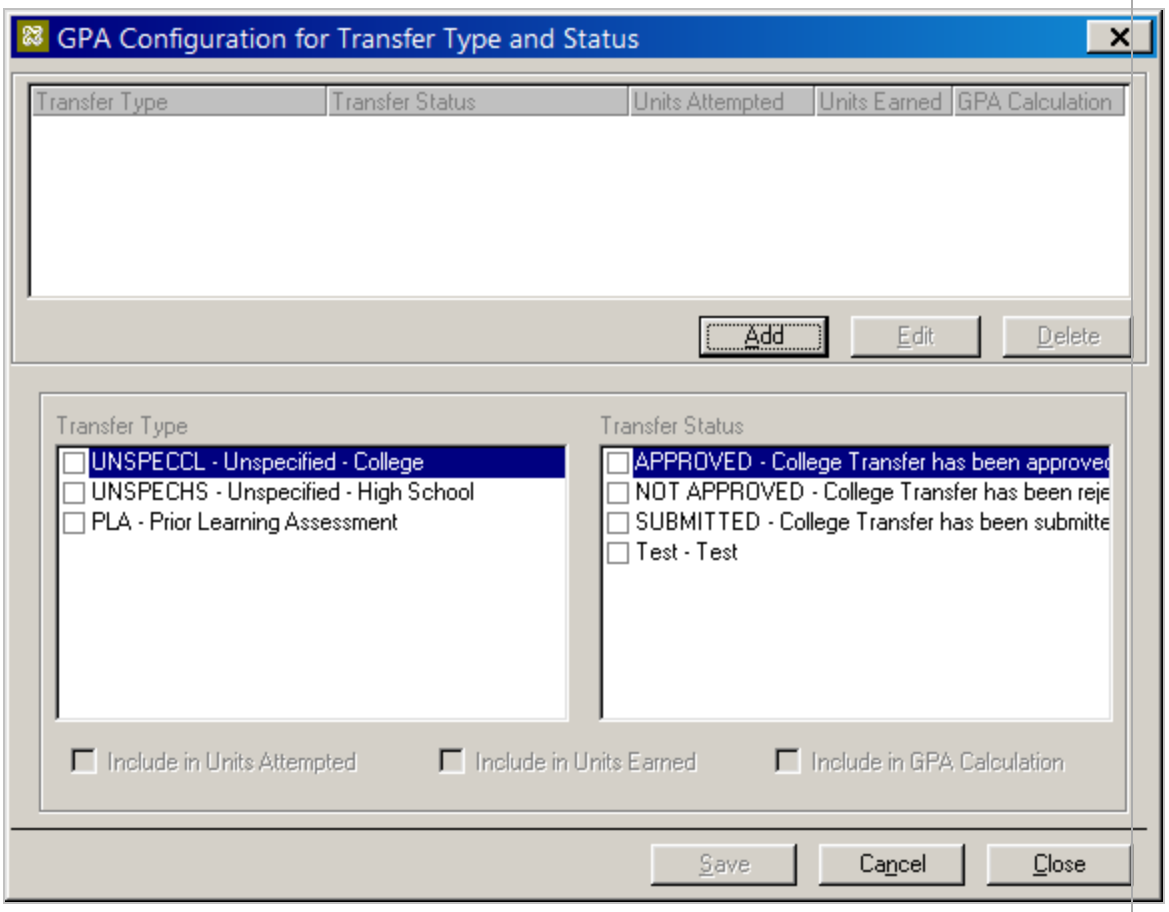
Field	Description
Previous Education	Select one of the Previous Education options: • **None** (default) – The GPA to excludes previous education records or courses from the Transfer Credit folder. • **Include Previous Education Totals** – The values stored on any and all previous college education records (if entered) are included in the GPA calculation. • **Include Transfer Records by Status** – The values from one or more specified transfer statuses are included in the GPA calculation. CampusNexus Student selects only the courses in the Transfer Credits folder that have the specified transfer status. • **Include Transfer Records by Type** – The values from one or more transfer types are included in the GPA calculation. CampusNexus Student selects courses in the Transfer Credits folder that have the specified transfer type. • **Include Transfer Records by Type and Status** – The values from one or more specified transfer statuses and types are included in the GPA calculation. Select a combination of transfer types and statuses using the **Configure** button. CampusNexus Student selects courses in the Transfer Credits folder that have the specified combination of type and status and includes them only in the specified calculations. **Note**: When one of the Transfer Records options is selected, CampusNexus Student uses the units and grade point values entered in the 'Details for Additional GPAs' on the previous institution course. ◦ If one of these values is not populated, the course is not included in the calculations. ◦ If the transfer record is graded with a campus transfer grade that is configured to be included in GPA calculations, the details from the campus course selected for the transfer credit are used. *Example 1* Select **Include Transfer Records by Status** and **College Transfer has been approved**.  *Example 2* a. Select **Include Transfer Records by Type and Status**.

Field	Description



b. Click **Configure** to designate the combination of type and status. The GPA Configuration for Transfer Type and Status form is displayed.

c. Click **Add** or **Edit** to define a new combination of transfer types/statuses or modify an existing combination of transfer types/statuses. The combination of one or more options for Transfer Type, Transfer Status, and 'Include in...' should be unique for every GPA configuration.



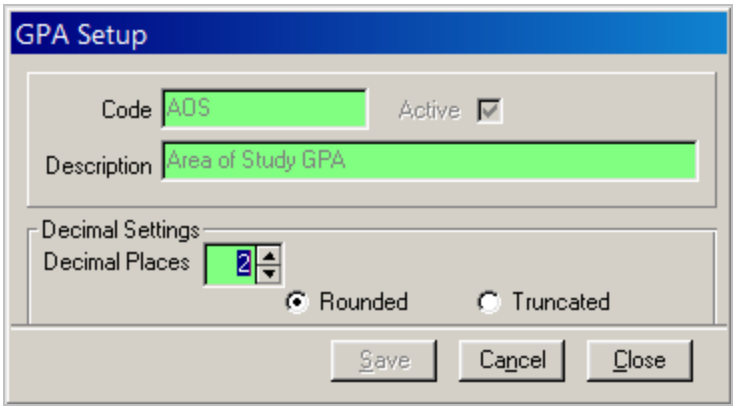
d. Click **Save**. All new combinations and changes to existing combinations are saved into memory temporarily. They are saved to the database when you click Save on the GPA Setup form.

Field	Description
Calculation Options	Select a **Retake Methodology** option: • Use Highest • Use Most Recent (default) • Average All • Include All Select from the following options: • **Weighted** - The GPA calculation uses quality points divided by credit attempted. For example, if a student takes four credit class and earns a letter grade of A, which is equal to 4 points, the student has 16 quality points. The quality points are divided by the total number of credits attempted to determine the GPA. To calculate a cumulative GPA (CGPA), the sum of all quality points the student earns is divided by the sum of all of credits attempted that affect the GPA (referred to as Quality Units). • **Unweighted** - The GPA calculation is based on the sum of grade points divided by the count of taken courses. For example, if a student takes two classes for a total of 8 credits and earns a letter grade of A (4 points) in one course and a letter grade of C (2 points) in the other course, the GPA is calculated as 6 points divided by 2 courses = 3.0 GPA. • **Credit Hour** - The units used in the GPA calculations are based on credits. • **Clock Hour** - The units used in the GPA calculations are based on a courses clock hours. **Note**: When creating a new school-defined GPA, the default values are Use Most Recent retake methodology, weighted calculations, and a credit hour curriculum standard.
Alternate Grade Points	Use this option when a GPA must be based on grade points that are different from standard grade scale configurations. An example is the HOPE Scholarship GPA. The regulations for awarding this scholarship state that a GPA must be monitored based on a straight 4.0 grade scale (A = 4, B = 3, C = 2, D = 1). This means that the GPA cannot be based on plus (+) or minus (-) grades. The Alternate Grade Points option allows you to override the grade points for plus and minus grades in your grade scale. Using the example of the HOPE Scholarship, you configure that an A- equates to 4 points in this GPA (when a standard scale may equate an A- to a 3.75). Therefore, you add an A- in the Letter Grade field and enter a 4.0 in the Grade Points field. CampusNexus Student checks for grades from courses taken at your institution that have a specified Alternative Grade Point value and applies the alternative points in that GPA calculation. Click **Add** to add an alternate grade or **Delete** to delete an alternate grade.
Display Options	Select the display options of the GPA on reports and forms. Each option has an 'Additional GPAs' section that lists the GPA description and the cumulative GPA. The options are: • **Transcripts** • **Degree Progress Audit** • **Report Cards** • **Show GPA in Fund Source Rules configuration** – recognizes the configured GPA as a potential GPA for you to select when creating auto awarding/fund source rules. **Note**: All currently stored system GPAs are available as selection criteria for auto awarding (with the exception of Course Categories and Course Level GPAs).

Field	Description
Include Comments on the Portal	Select this option to enter additional GPA comments for GPAs that are displayed to students on Portal. Enter a maximum of 2000 characters. When you click **Save**, the comments are saved and become visible on Portal.

To edit a GPA code:

1. Select a record in the grid of the Setup - Academic Records Lists [GPA] form.
2. Click **Edit**. The following form is displayed:



3. If necessary, edit the decimal places fields for the system GPAs. The change in decimal places applies to all campuses system-wide.

   If you Edit one of your school-defined additional GPAs, the original setup form is displayed; however, the fields you can revise are limited. The non-editable fields are disabled.

   You can only edit the configuration options that result in a recalculation of the GPA. CampusNexus Student does not allow changes to the configuration options that determine which courses are included in the GPA calculations. This ensures that the courses that are manually applied to a GPA are not removed and avoids a scenario that may cause confusion for students (for example, an undergraduate GPA being changed to include graduate coursework).

   If a school-defined GPA was configured incorrectly and needs to be revised, delete the incorrect GPA configuration and create a new GPA.

4. Click **Save** and **Close** to return to the Setup - Academic Records Lists [GPA].

   Note: When you change GPA settings (system GPA decimal settings included), CampusNexus Student only recalculates GPAs for Active, Enrolled, and Temp Out students. This ensures that the GPAs for graduates and students who are no longer attending your institution remain unchanged from when the students left. However, if changes are made to a permanent out students that would cause a GPA recalculation (such as changing a grade), those students would have their GPAs recalculated according to the current GPA settings.

5. Click **Delete** to remove your school-defined/additional GPA. Doing so removes the GPA from the list and from all student records. Before the GPA is deleted, a message alerts you of how many student records are impacted. Click **Yes** to proceed or **No** to cancel the deletion.
6. Click **Disable** if you want maintain the school-defined GPA for existing students, but no longer want to apply the school-defined GPA to incoming students.

Note: Only school-defined GPAs (not system GPAs) can be disabled.

7. To reactivate the GPA, click **Enable**. A 'Y' appears in the Active column, and the Enable button changes back to Disable.

   Note: Do not select 'Only Show Active' if you want to continue to see the disabled GPA on the grid with an 'N' in the Active column.

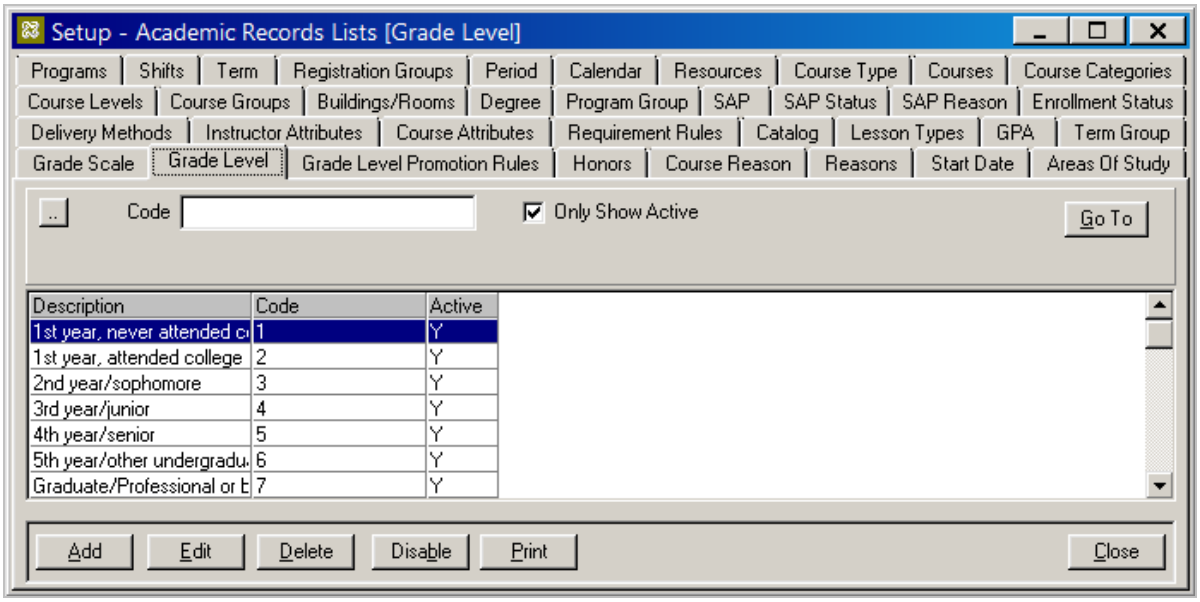
Setup - Academic Records Lists [Grade Level]

The grade level list contains descriptions for the grade levels of students enrolled in your institution. The list should reflect the codes that are used by the Department of Education to determine eligibility for financial aid. This table is used in preparing the FAFSA form.

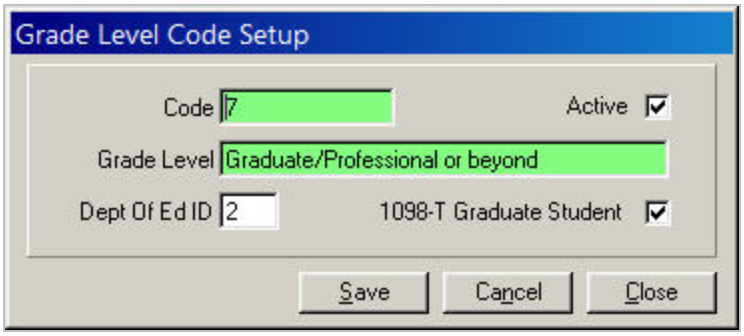
Note: If you change the Dept. of Ed ID on grade levels, the grade level ranges in Financial Aid Packaging Methods may need to be adjusted.

To add or edit a list of grade level codes:

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Grade Level**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Grade Level Code Setup form is displayed.



6. Specify a unique **Code**.

7. Enter a **Description**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Specify the corresponding Department of Education grade level code by entering the appropriate number in the **Dept of Ed ID** field.

   The Department of Education assigned the following numbers to the grade levels:

   - 0 = 1st, never attended
   - 1 = 1st, attended before
   - 2 = 2nd year/sophomore
   - 3 = 3rd year/junior
   - 4 = 4th year/senior
   - 5 = 5th year or more undergraduate
   - 6 = 1st year graduate/professional
   - 7 = continuing graduate/professional
10. Select **1098-T Graduate Student** to designate that a grade level code is to be used in the graduate student calculation for 1098-Ts, and will be selected for codes flagged with a 'Dept Of Ed ID" of 5, 6, or 7.
11. A student is considered to be a **Graduate Student** based on the grade level being assigned a 6 or 7 in the Dept of Ed ID field if the new Department of Education configuration listed above is used.

    Note: When awarding manually or autopackaging a Grad PLUS loan, the grade level from the student's Financial Aid Academic Year form is checked.

    - If the grade levels for '1st year never attended', '1st year attended before', and '5th year undergraduate' are configured with codes 0, 1, and 5 respectively, CampusNexus Student considers the new Dept. of Ed. IDs to be in use, otherwise it considers the old configuration to be in use.
    - If the old configuration is in use, only the Dept. of Ed. ID number 7 are considered to be a graduate student grade level because the original/old Dept. of Ed. ID number 6 meant 5th year continuing undergraduate.
    - If the new configuration is in use, the Dept. of Ed. ID numbers 6 and 7 are considered to be a graduate student grade level.

    If the student is assigned to a grade level of '1st, never attended', CampusNexus Student considers the student a First Time Borrower and enables the First Time Borrower flag. Disable this flag when packaging the student for disbursements.
12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Academic Records Lists [Grade Level Promotion Rules]

CampusNexus Student packages subsidized and unsubsidized loans up to the maximum allocated within the packaging method assigned to the student's academic year and provides an accurate representation of the student's eligibility for subsidized and unsubsidized loans.

Users configure the maximum amounts for each fund source based on the student's eligibility and EFC as defined by the Department of Education for each program. The thresholds are based on the student's grade level for the current enrollment, therefore a student's loan eligibility changes as the student's grade level changes. The student is eligible as soon as the new grade level is reached. If the student was already packaged for a lower amount, the student can receive an additional amount in subsidized aid based on the new grade level.

While users can manually add this additional aid record to determine and manually update the grade level on the student's academic year record, they can also use Grade Level Promotion Rules to define a schedule for the number of credits needed to automatically advance a student's financial aid packaging and grade level promotion. If a student meets the defined threshold during the year, the student is automatically packaged for the additional eligibility loans to an estimated status, automatically promoted to the new grade level, and activities are triggered to the student's financial aid advisor to review the additional eligibility loan record to validate and approve eligibility.

Note: An activity must be scheduled in the activity scheduler by the user for the activity to be properly triggered. A sample activity might work like this:

- Code: ADDLOAN
- Description: Additional Loan Eligibility Notification
- Comments: *A grade level change to the student's academic year found additional loan eligibility. The loan has been added to the student's award record in an estimated status. Please evaluate the award to confirm eligibility. Activity is due on the day it is scheduled.*
- Activity Type: Message

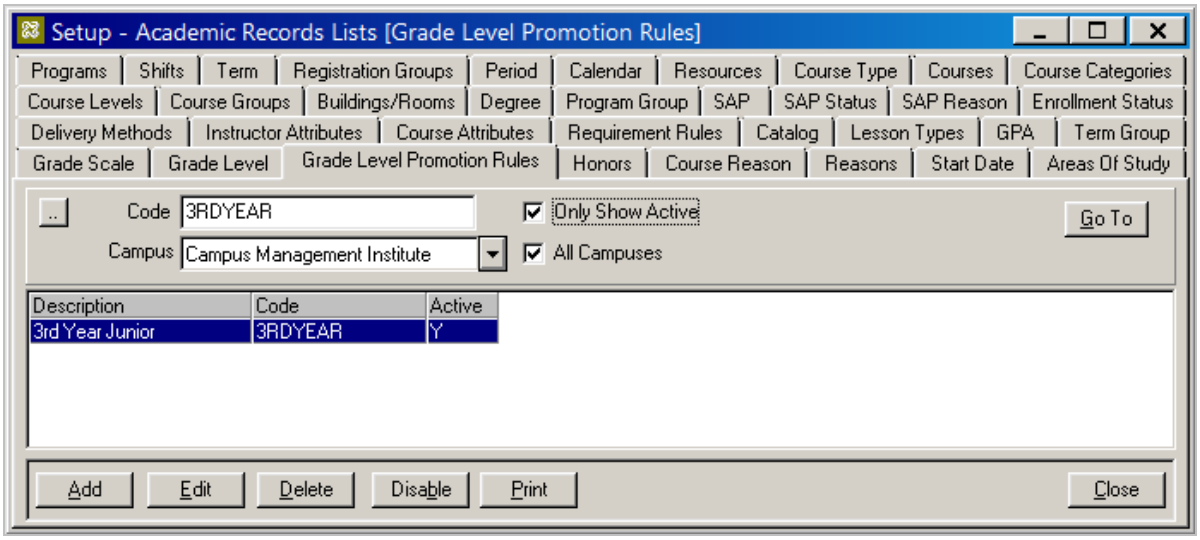
The user would then trigger this activity to occur when a loan is added using "Additional Loan Eligibility Added (Auto Change)" as a "When" condition in the Activity Scheduler.

Automatic Grade Level Promotion and Anticipated Grade Level Evaluation

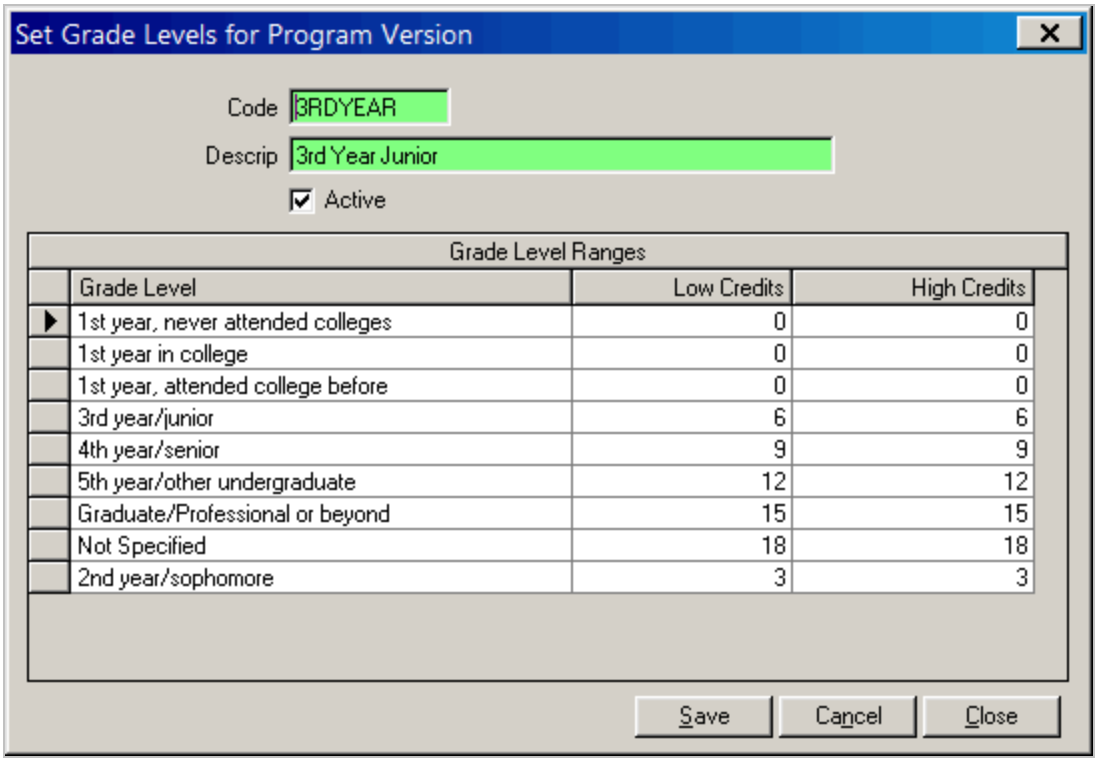
These options are enabled from the Setup menu and require proper privileges to change the settings. For more information, see Setup > Campus Locations > Options (tab) > Grade Level Promotion.

To add or edit a list of grade level promotion rules:

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Grade Level Promotion Rules**.



3. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Set Grade Levels for Program Version form is displayed.



7. Specify a unique **Code**.
8. Enter a **Description**.

9. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
10. For each grade level that is affected by the current rule, select the Grade Level and specify the minimum number of credits required by that level in the **Low Credits** field. (Use the **Tab** key to advance to the next field.)
11. Specify the maximum number of credits allowed before the student is automatically advanced to the next level in the **High Credits** field. (When you click **Save**, zeroes are automatically inserted into any fields left blank.)
12. Continue to modify each grade level that is affected by this rule.
13. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

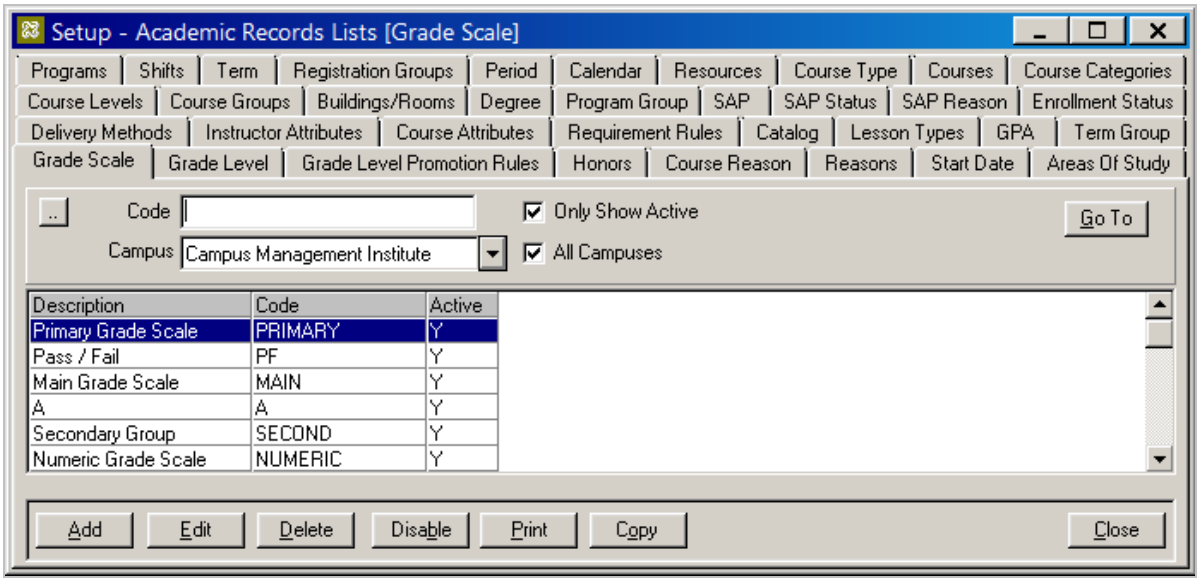
Setup - Academic Records Lists [Grade Scale]

The Grade Scale list establishes the grading parameters that your institution uses to evaluate the academic achievements of its students. An institution can have multiple grade scales. Each academic program has a grade scale related to it. Each grade scale is associated with all campuses or with a campus group.

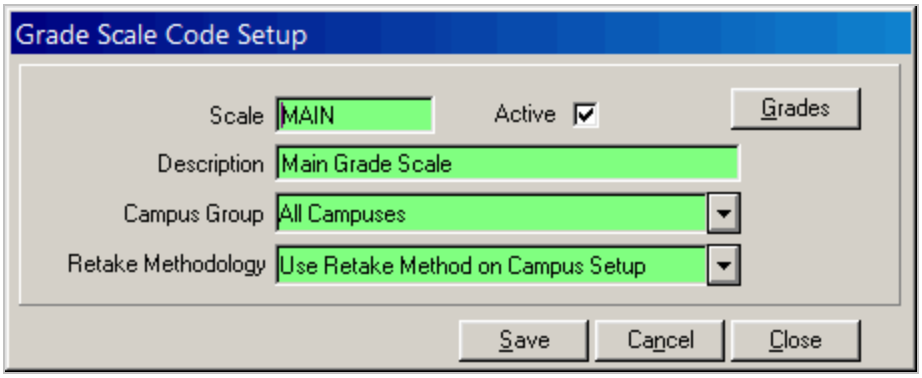
The attributes of a grade scale include a description, grade letters or numeric values, grade points, and indicators as to how the grade is treated in GPA calculations and academic progress.

To add or edit a list of grade scale codes:

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Grade Scale**.



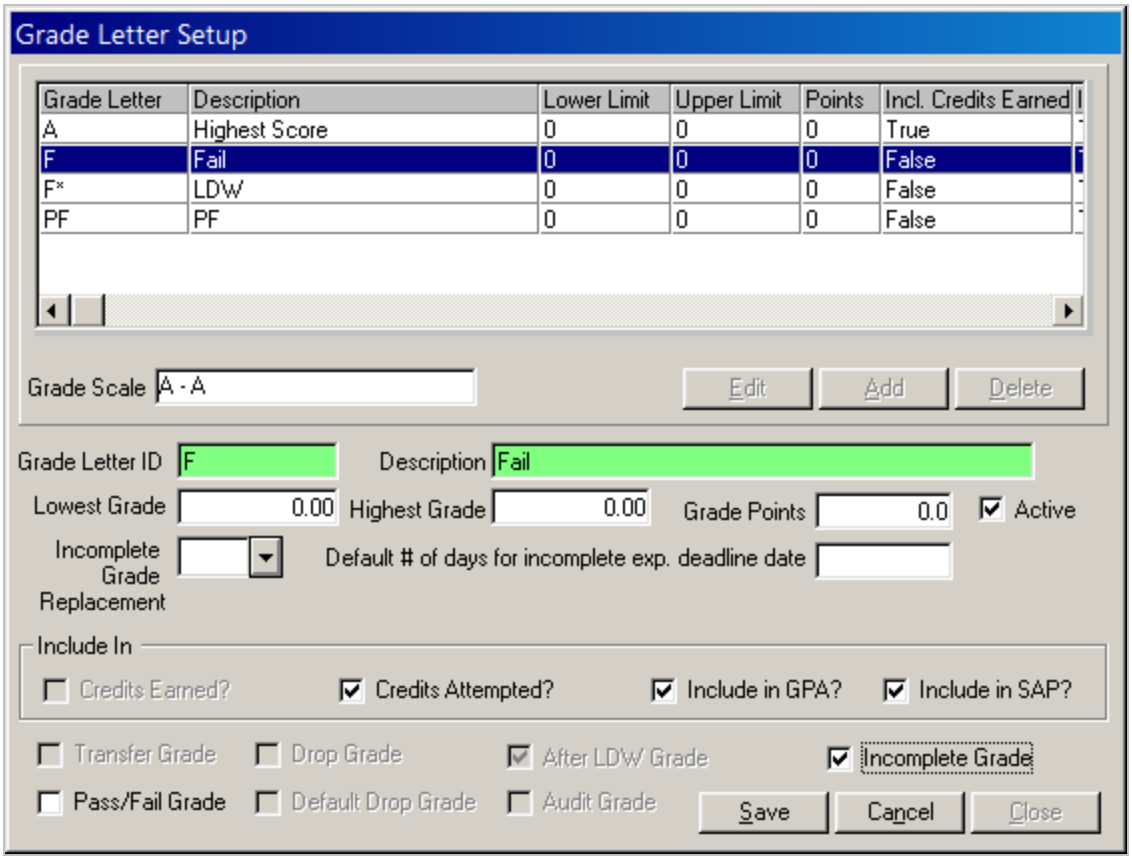
3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Grade Scale Code Setup form is displayed.



7. Specify a code for the grade scale in the **Scale** field.
8. Enter a **Description**.
9. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
10. Select a **Campus Group**.
11. Select a **Retake Methodology**. The options are as follows:
    - 0 - Use Retake Method on Campus Setup (default)
    - 1 - Use Highest
    - 2 - Use Most Recent
    - 3 - Include All
    - 4 - Average Retakes
12. Click **Save**.

To add or edit letter grades in a grade scale:

1. Click the **Grades** button on the Grade Scale Code Setup form. The Grade Letter Setup form is displayed. The Grade Scale field shows the name of the grade scale being displayed.



2. Specify the **Grade Letter ID** and **Description**.

   For Pass/Fail grade letter systems, designate "P" for a passing letter grade and "F" for a failing grade.

3. Specify the **Lowest Grade** and **Highest Grade** if your institution uses numeric ranges to assign grades.

   If the Grade Scale is used in conjunction with Grade Book, the Lowest Grade (minimum) and Highest (maximum) values for the Pass grade assigned to the Pass/Fail Grade Scale MUST be entered.

4. Specify the **Grade Points** for the letter grade. This value is used in calculating grade point averages (GPAs).

5. Enable the **Active** check box to include this grade in the grade scale.

   The Active field on the Grade Letter Setup form is used to flag grades that are active and used within a grade scale. Making a grade inactive may cause ranges for the Lower Limit, Upper Limit, and Points to be excluded from the grade scale resulting in gaps for grade calculations.

   Note: Selecting the **Disable** button on the Grade Scale form deactivates this check box and the selected grade scale. Selecting the **Enable** button on the Grade Scale form activates this check box and the selected grade scale.

6. Select **Credits Earned?** to indicate that academic credit is earned when the student is awarded this grade.

   Select this option for a Pass/Fail grade scale.

7. Select **Credits Attempted?** to indicate that the student has officially attempted this course.

8. Select **Include in GPA?** to indicate that the point value of this grade is included in the student's GPA calculations.

Select this option if a passing grade for a pass/fail grade scale is assigned a specific letter grade, such as a C+, and counts toward the GPA Calculation.

9. Select **Include in SAP?** if you want this grade included in the calculation of satisfactory academic progress (SAP).
10. Select **Transfer Grade** if your institution transfers credits from other institutions. The typical method is to set up a "T" grade with the following parameters:

    - Lowest Grade = 0
    - Highest Grade = 0
    - Grade Points = 0
    - Credits Earned = True
    - Credits Attempted = False
    - Include in GPA = False
    - Include in SAP = False

    Note: When you mark a course with a "Transfer Grade", the course thus graded is not included in revenue recognition calculations.

11. Select **Drop Grade** to use this grade as a choice for assigning a final grade to a dropped course.

    This field is disabled by default and only appears if the campus grade scale requires a final grade for a dropped course.

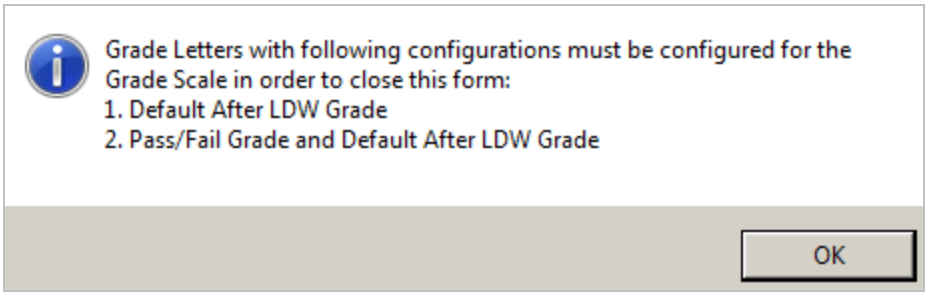
12. Select **Default Drop Grade** to designate the selected grade to be the default used for dropped courses during daily processes.

    You can define one default drop grade per grade scale. If the default drop grade is made inactive, you must select a new default drop grade before closing the Letter Grade Setup form. You cannot exit the Letter Grade Setup without defining a default drop grade. This field is disabled by default and only appears if the campus grade scale requires a final grade for a dropped course (see Setup > Campus Locations > Academic Records (tab) > Grade Entry for Dropped Course).

13. Select **After LDW Grade** to designate the letter grade as a default grade to be posted on courses automatically during a status change to a system status of 'Dropped'. The default After LDW Grade posted is posted only when the course section's Last Day to Withdraw date is in the past and a course withdrawal is therefore prohibited during status change processing.

    Important Note:

    If Enforce Last Day to Withdraw is enabled in Setup > Campus Locations > Edit/Add > Academic Records (tab) for any campus in the campus group associated with the grade scale, the After LDW Grade check box must be enabled on at least one standard non-drop grade (for ex 'F'), as well as one Pass/Fail grade. If After LDW Grades is disabled on a grade scale for a campus enforcing a last day to withdraw, you cannot save the grade scale changes. The following message is displayed:



14. Select **Audit Grade** to associate the grade letter only with the audit courses.

To convert a course to an audit course, use the Convert to Audit Course button on the Schedule form, or use another grade for this purpose that does not have the audit flag selected in the Grade Scale Setup form.

15. Select **Pass/Fail Grade** on the letter grades applicable to Pass/Fail course sections.

    Note: Pass/Fail grades must be configured for any campus that has courses designated as Pass/Fail Only or Pass/Fail by Student's Choice in Lists > Academic Records > Courses and Daily > Academic Records > Schedule Classes.

16. Select **Incomplete Grade** to designate a grade as an incomplete grade. The following fields are enabled:

    - **Incomplete Grade Replacement** - Select the grade that automatically replaces the incomplete grade after the expiration deadline date has passed. If the replacement grade is not configured, the incomplete grade is not automatically replaced past the expiration deadline date.
    - **Default # of days for incomplete exp. deadline date** - Specify the number of days added to the course section end date to calculate the expiration deadline date.
        - If this field is left blank, the logic goes to the next hierarchy levels to find this value, namely the Course and then the Campus Locations.
        - If the 'Default # of days...' is found to be blank at all three places, the expiration deadline date is populated with the current date.
        - If the replacement grade has been configured without configuring the 'Default # of days...' at any of the three hierarchy levels, the incomplete grade is replaced when the night job runs. The results of the night job are similar to those obtained if the 'Default # of days...' configuration was in place. The only difference is that the deadline date is set to the current date of grade posting.

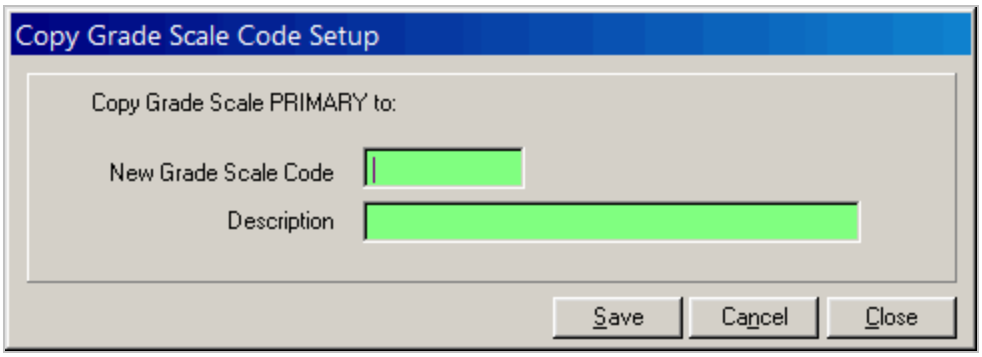
    Note: A grade designated as an incomplete and the replacement of an incomplete grade cannot be configured to be an audit, transfer, default drop grade,after LDW grade, or drop grade.

    Incomplete grade configurations are copied over as part of the grade scale if you are copying a grade scale.

17. Click **Save**.
18. Click **Close** to close the form. You are returned to the Grade Scale Code Setup form.

To copy a grade scale:

1. On the Setup - Academic Records Lists [Grade Scale] form, select the grade scale to be copied.
2. Click **Copy**. The Copy Grade Scale Code Setup form is displayed.



3. Specify a **New Grade Scale Code**.

4. Enter a **Description**.
5. Click **Save**. CampusNexus Student creates the new grade scale by copying all grades from the source grade scale.
6. Open the newly created grade scale and edit it using the add/edit procedure.

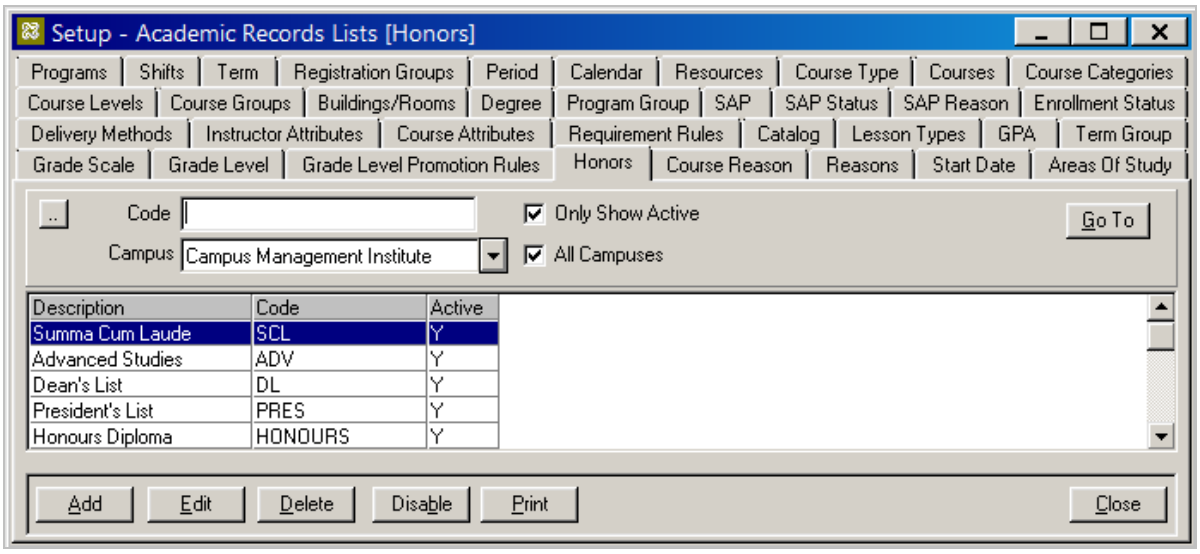
Setup - Academic Records Lists [Honors]

Use the Setup - Academic Records Lists [Honors] form to create honors codes. The codes can be assigned to student enrollment records.

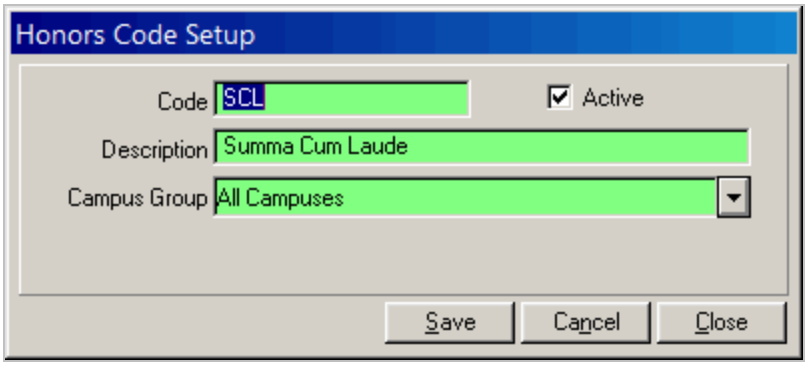
- See Daily > Academic Records > Honors for the wizard that assigns an honors code to an enrollment for a selected term.
- See View > Academic Records > Enrollment > Term Summary (tab) to assign an honors code to the student's term summary record.

To add or edit a list of honors codes:

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Honors**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Honors Code Setup form is displayed.



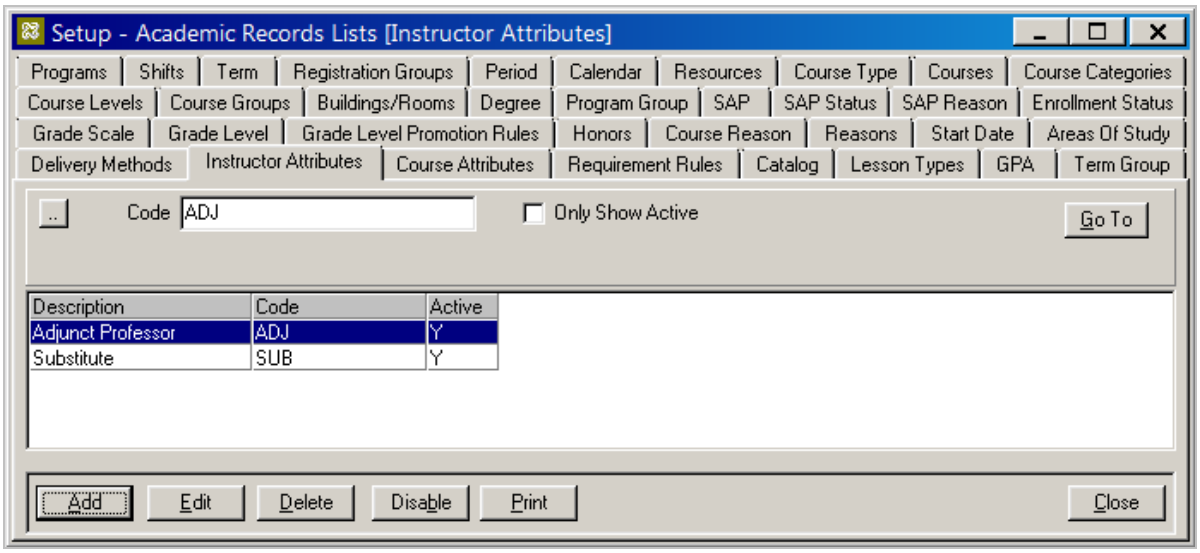
7. Specify a unique **Code**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Enter a **Description**.
10. Select a **Campus Group**.
11. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Academic Records Lists [Instructor Attributes]

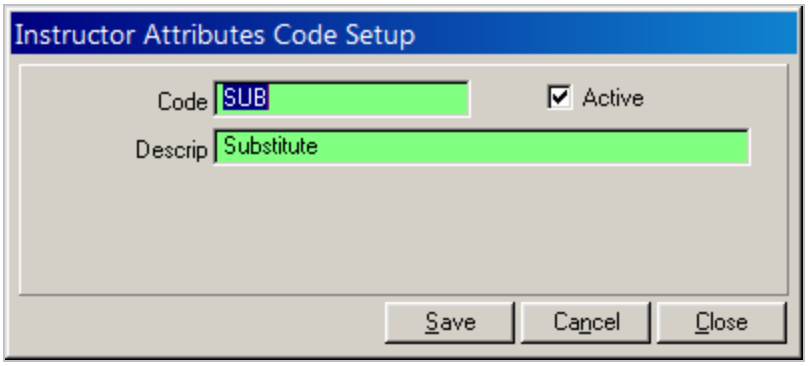
Use the Setup - Academic Records Lists [Instructor Attributes form to set up a list of attributes that can be associated with instructors at the course level.

To add or edit a list of instructor attributes codes:

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Instructor Attributes**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Instructor Attributes Code Setup form is displayed.



6. Specify a unique **Code**.
7. Enter a **Description**.

8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Academic Records Lists [Lesson Types]

Lesson types are used to define the types of tasks, such as exam, book report, etc., a student must accomplish to complete a class section. Lessons are defined at the class section level and are used primarily with Portal Each lesson may account for a certain percentage of the tasks required to complete the course. When lessons are created for a course, each lesson must have a lesson type associated with it.

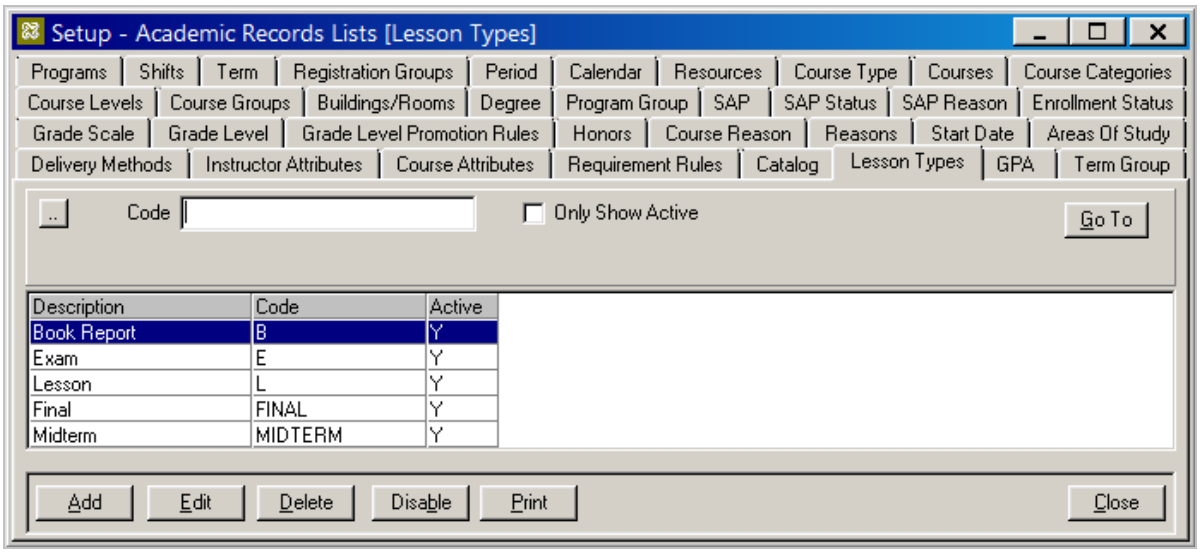
CampusNexus Student provides the following system-defined lesson types. Additional lesson types may be defined as required.

- Lesson
- Exam
- Book Report

Note: Course fees only charge for lessons whose lesson type is system -defined. They are not to be used for user-defined lesson types.

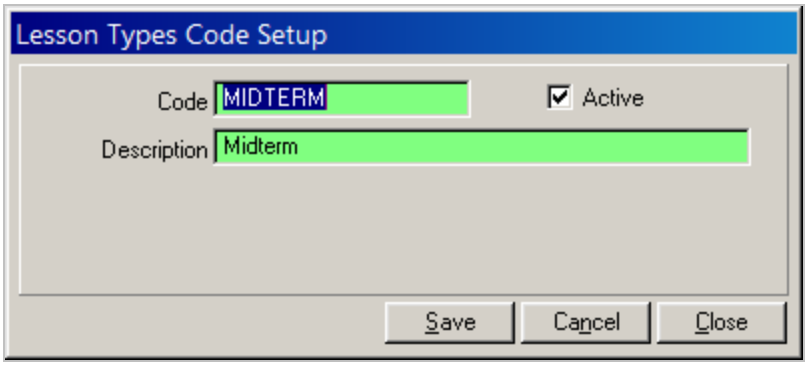
To add or edit a list of lesson types codes:

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Lesson Types**.



Note: The system-defined lesson types are always displayed. They cannot be deleted, but can be set to inactive.

3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Lesson Types Code Setup form is displayed.



6. Specify a unique **Code**.
7. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
8. Enter a **Description**.
9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

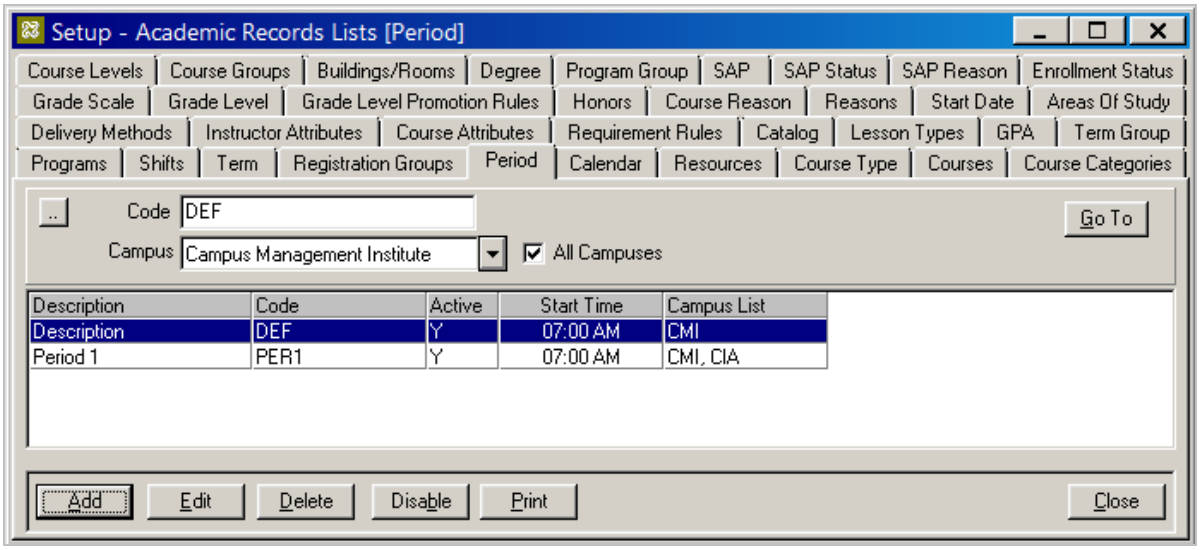
Setup - Academic Records Lists [Period]

Use the Setup - Academic Records Lists [Period] form to define the periods of time in which classes are scheduled at your institution. Each period on the list can be related to a start time, duration in minutes, and days of the week.

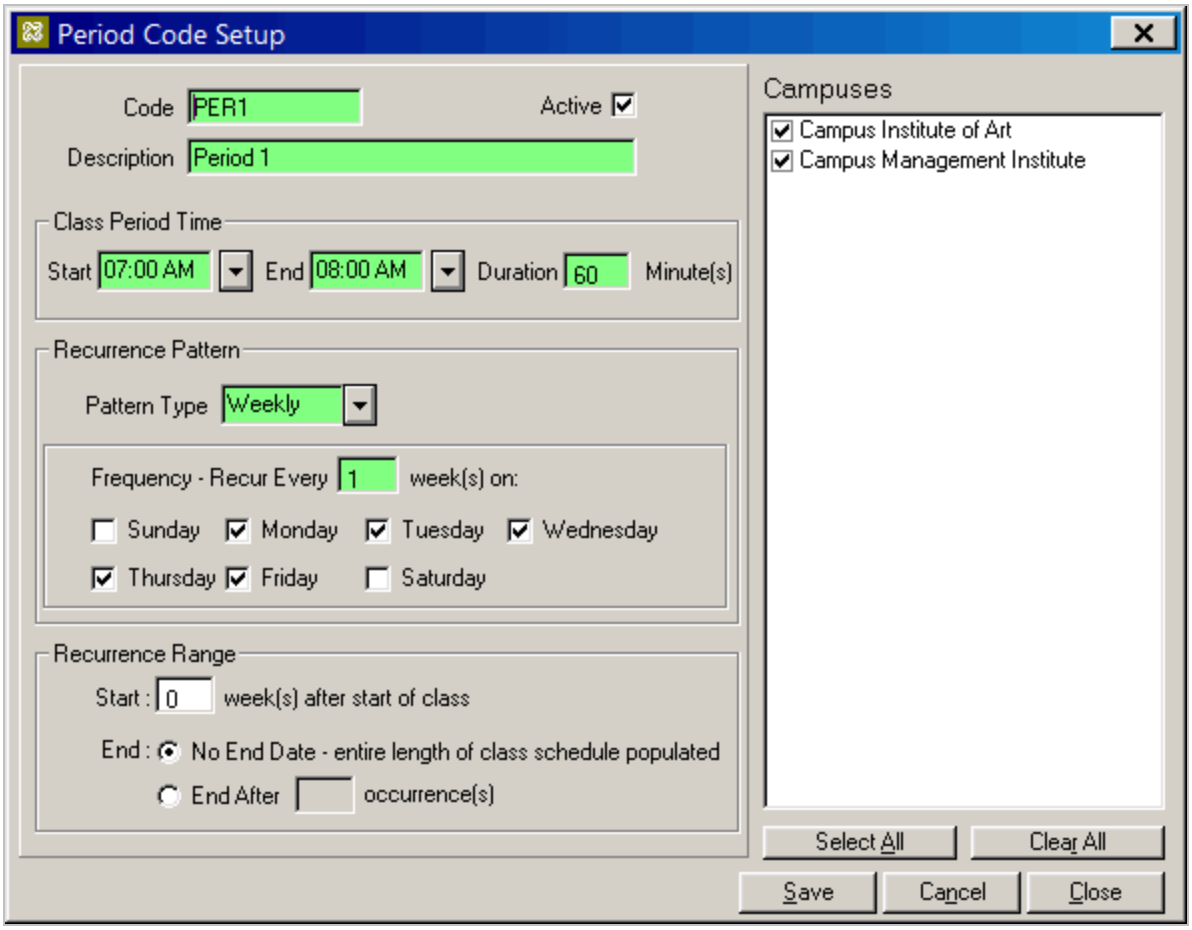
Codes from the Period table are associated with class section scheduling records. It is possible to design a pattern of periods covering multiple days of the week that can be used to fill in the schedule for a class section with one mouse click. On the other hand, it is not necessary to have period codes to fill in a schedule for a class section. This is especially true for situations in which classes meet at irregular times.

To add or edit a list of period codes:

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Period**.

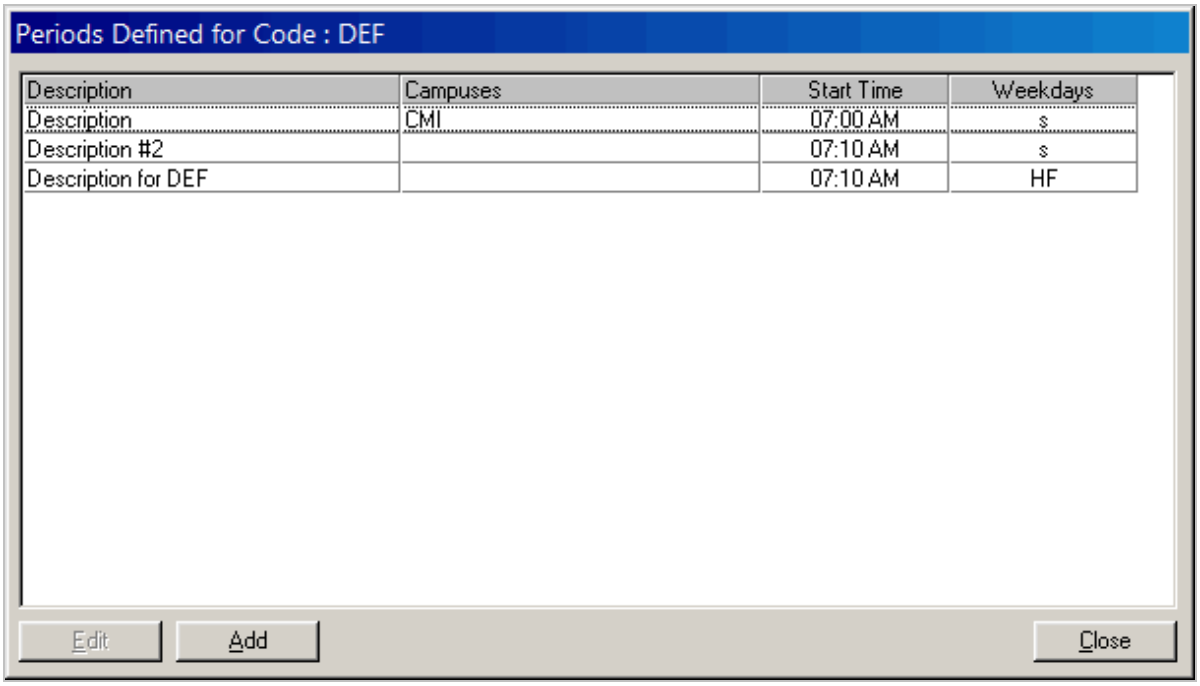


3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Click **Add**, or select a record and click **Edit**. The Period Code Setup form is displayed.



6. Specify a unique **Code**.

   It you enter a duplicate code, the Periods Defined for Code form is displayed listing all duplicate codes and the campuses for which they are defined.



a. To continue adding the new (duplicate) period code, click **Add** and complete the period data entry. The Periods Defined for Code form is displayed.

b. To edit a period on the list, click **Edit** and change the selected period data.

c. Click **Close** to close the form.

7. Enter a **Description**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Select one or more **Campuses**.
10. Select the **Start** and **End** times.
11. Specify the **Duration** in minutes. If a class meets for 50 minutes and there is a ten minute break between classes, the period duration is usually set up as 60 minutes to give the students credit for one hour of class time.
12. Select the **Pattern Type**. The options are Monthly and Weekly.
    - If you select a Monthly pattern type, specify the date and the day on which the monthly class meeting should recur.
    - If you select a Weekly pattern type, specify the day of the week and the number of weeks to after which the weekly class meeting should recur.
13. Specify the number of weeks after the **Start** of the class on which the recurrence meeting pattern is to be applied to generate the class schedule.
14. Select **No End Date** if the recurrence pattern for the class schedule is applicable for the entire term.

    - OR -

Select **End** and select the number of recurrences after which the recurrence pattern for a class schedule should end.

15. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

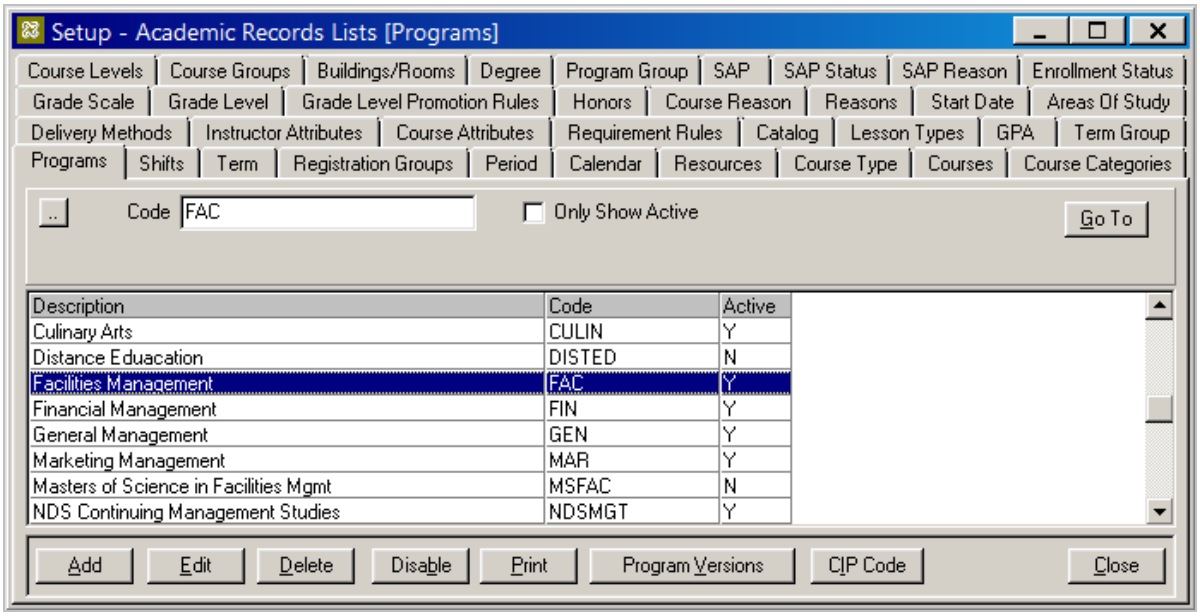
Setup - Academic Records Lists [Programs]

The Setup - Academic Records Lists [Programs] form is used to define attributes for programs. Programs are associated with program versions, entrance tests, documents required from students, and requirement rules. The costs associated with a program are set up under Lists > Student Accounts > Programs after you define the programs .

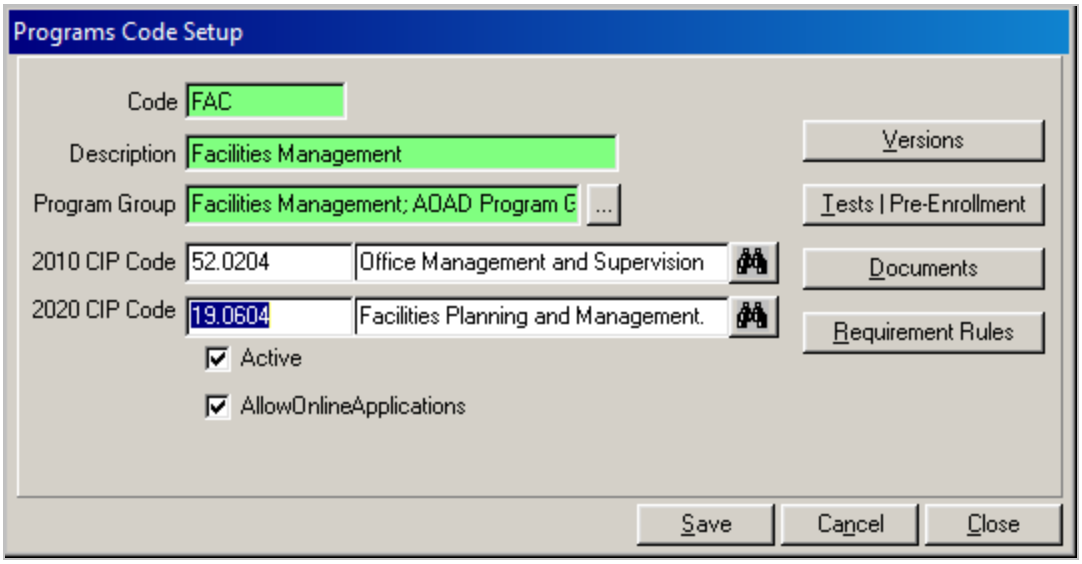
Students enroll in a version of the program. For each program version, you specify parameters such as program groups, credits required, hours required, grade scale, SAP table, campuses, and so on. Furthermore, a course list is assigned to the program version, along with dates for start, midpoint, expected graduation date, and maximum graduation date. More that one program version can be established to meet variable circumstances,

To add or edit a list of program codes:

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Programs**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Programs Code Setup form is displayed.



6. Specify a unique **Code**.

   If you are entering a new program code, click **Save** to record the new code before proceeding to the Versions, Tests | Pre-Enrollment, Documents, or Requirement Rules setup.

   The following message is displayed: *Update program group changes to program versions?*

   Click **Yes** to update and save program group additions to the program and its respective program versions.

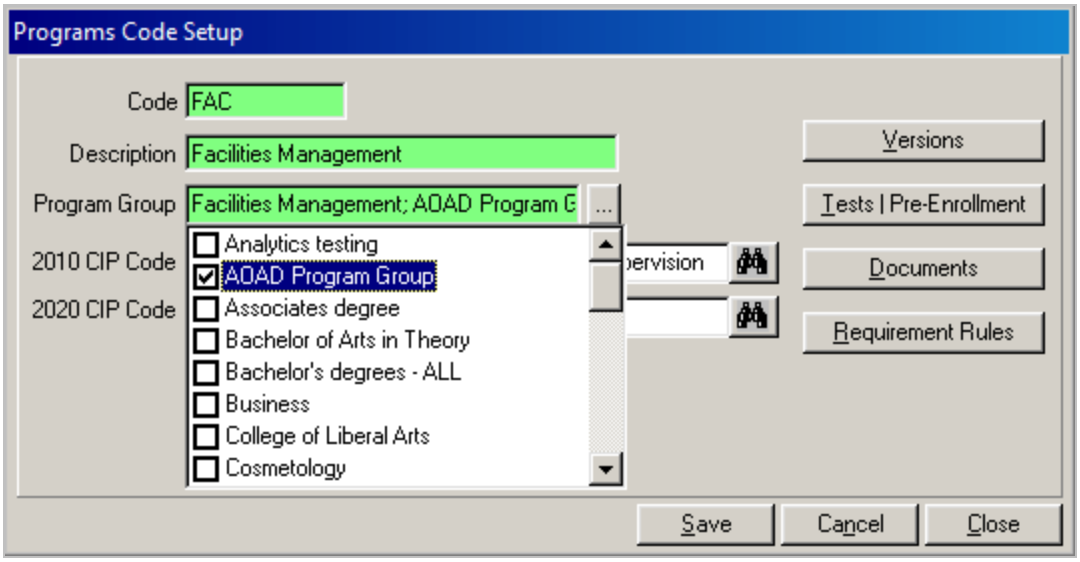
7. Enter a **Description**.

8. Multiple program groups can be associated with a program version. Since the multiple program group association occurs on the program level, program versions belonging to a program are automatically associated with a program group once it is associated with the program.

   By having the ability to group programs and program versions in a variety of methods using the program group, information can be easily extracted through reporting. The system reports Master Student Listing Summary and Lead Master Listing Summary include the selection criteria of program group. This allows the student population to be filtered by the program groups to which their enrollments or leads are associated.

   You can select one or more program groups within a program version and save the multiple selection of program group to the program version; you can remove one or more program groups from each program version.

   Click ... next to the **Program Group** field, select one or more Program Groups, and click **Save**.



The following message is displayed: *Update program group changes to program versions?*

Click **Yes** to update and save the program group selection to the program and its respective program versions. The Program Group field displays the program group associated with the program.

Note: The program groups displayed when you clicked ... are created in Lists > Academic Records > Program Group. Only program groups marked active on the Program Group form are displayed.

You can add program groups or remove (disassociate) one or more program groups from each program version. Additions and modifications are updates on the respective program versions.

To edit the existing association of a program group with a program, clear the check box of one or more program groups associated with the program.

The following message is displayed: *Update program group changes to program versions?*

Click **Yes** to update the disassociation from the respective program versions, or click **No** to update the dis-association from the program only.

Note: When all program groups are removed from the program.The following message is displayed: *Modifications will not be updated to the Program Versions. Do you wish to continue?*

Click **Yes** to apply changes to the program only, or click **No** to undo the changes.

9. Click to search for a **2010 CIP Code** or **2020 CIP Code**. The Search 2010 CIP Code or Search 2020 CIP Code form is displayed.

   See Associate CIP Code with Area of Study or Program.

10. Select or clear the **Active** check box.

    - If you select the Active check box, CampusNexus Student updates the Active flag on the program only, not the program versions.
    - If you clear the Active check box, CampusNexus Student updates all program versions and changes them to inactive.

11. Select **Allow Online Applications** to allow students to submit an online application for the program .

12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.
13. Continue with the setup for:
    - Versions
    - Tests | Pre-Enrollment
    - Documents
    - Requirement Rules

Programs > Program Versions

Program versions are used to distinguish between variations of a program. At least one program version must be defined for each program. The types of variations you might require include changes in the list of core and elective courses required to complete the program. Other variations might be the cost of the program or the length of time required to complete it. Each program version is likely to have different start and end dates.

An initial program version is defined and, as the parameters of the program are changed, such as course list, costs, start and end dates, etc., the changed program is assigned a new version number. Records are kept for each student to retain the program version number and parameters for which the student is enrolled.

Program versions make it possible for your institution to change the parameters of a program for new students without affecting the agreements you have with previously enrolled students. A program version can be marked as inactive when you are no longer accepting students for enrollment. Marking the program version as inactive does not impact any students that are already enrolled in it.

Create and update the program version information and related items (billing methods, revenue methods, and program budget) directly from the Program Version form. Permission to display, create, and update Financial Aid, Student Accounts, and Academic Records is required to use the program version method selections.

Notes:

- You cannot delete a program version if students enrollments are assigned to the program version.
- When two connected enrollments are configured with different enroll status minimums on the program versions, CampusNexus Student uses the program version settings of the default connected enrollment to calculate enrollment statuses on both enrollments.

Real Time Scheduling

Students can view their real time scheduled hours and attended hours for each class that they are currently registered in and have completed so that they know how many hours they have been scheduled for up to today and how many hours they have attended. Institutions can choose a course based on real time scheduled hours or on a student based scheduled hours calculation. The real time scheduling feature can be turned on or off at the system level. If it is turned on, any enrollments that are configured to use real time scheduling have their hours attempted and hours earned updated using the attendance data for any courses that are in a future or scheduled status.

When real time scheduling is enabled, it allows students with different scheduled hours to be enrolled in the same course section. Any course that has posted attendance will show real time scheduled hours and attended hours when real time scheduling is enabled; this includes current courses, LOA courses, and dropped courses. Courses that have no attendance posted and real time scheduling is enabled will show zero scheduled hours and attended hours; this includes future and scheduled status courses. Users can view hours attended and hours scheduled up to the LDA before the final grade is posted on the final grades folder.

CampusNexus Student sets the SAP Milestone date based on the scheduled hours using the projection logic (Attend Hours + Absent Hours) - Makeup Hours up to the LDA, going forward from the LDA date it uses scheduled period hours. The SAP milestone date is updated every time attendance is posted, so that SAP can be evaluated at the appropriate time. CampusNexus Student removes the SAP status for a student when a student's SAP milestone date has been moved to the future. The Attended Hours Basis value 'A' is 'Attendance Totals - Payment Period End Date' and 'M' is 'Attendance Totals - SAP Milestone.'

CampusNexus Student calculates scheduled hours for real time scheduling and percentage complete when executing the refund calculation process. A return to Title IV calculation for clock hour students removes holidays and canceled classes when determining the percentage of the period completed. CampusNexus Student prevents the earning method configuration for revenue to be set to scheduled hours when the student's program version is configured for real time scheduling, as real time scheduling is based on attendance and not scheduled hours.

When a student has multiple enrollments, a course that has been configured under a program version with real time scheduling cannot be reassigned to an enrollment that is not configured with real time scheduling. It can only be reassigned to another program version that uses real time scheduling. The same is also true for transfers. Associated courses follow the enrollment from which they are associated. For example, if the program version under which the courses were taken was a real time scheduled

program version, the courses continue to use the real time scheduling attribute. When a program version is configured for real time scheduling, users cannot configure an excused absence policy.

Users can cancel a class, yet still record attendance for anyone who may have attended prior to the class cancellation, so that every hour earned by a student is recorded in CampusNexus Student. Users can also reduce the scheduled hours for students who attend an event that is relevant to their learning so that students are not penalized for taking advantage of an educational opportunity.

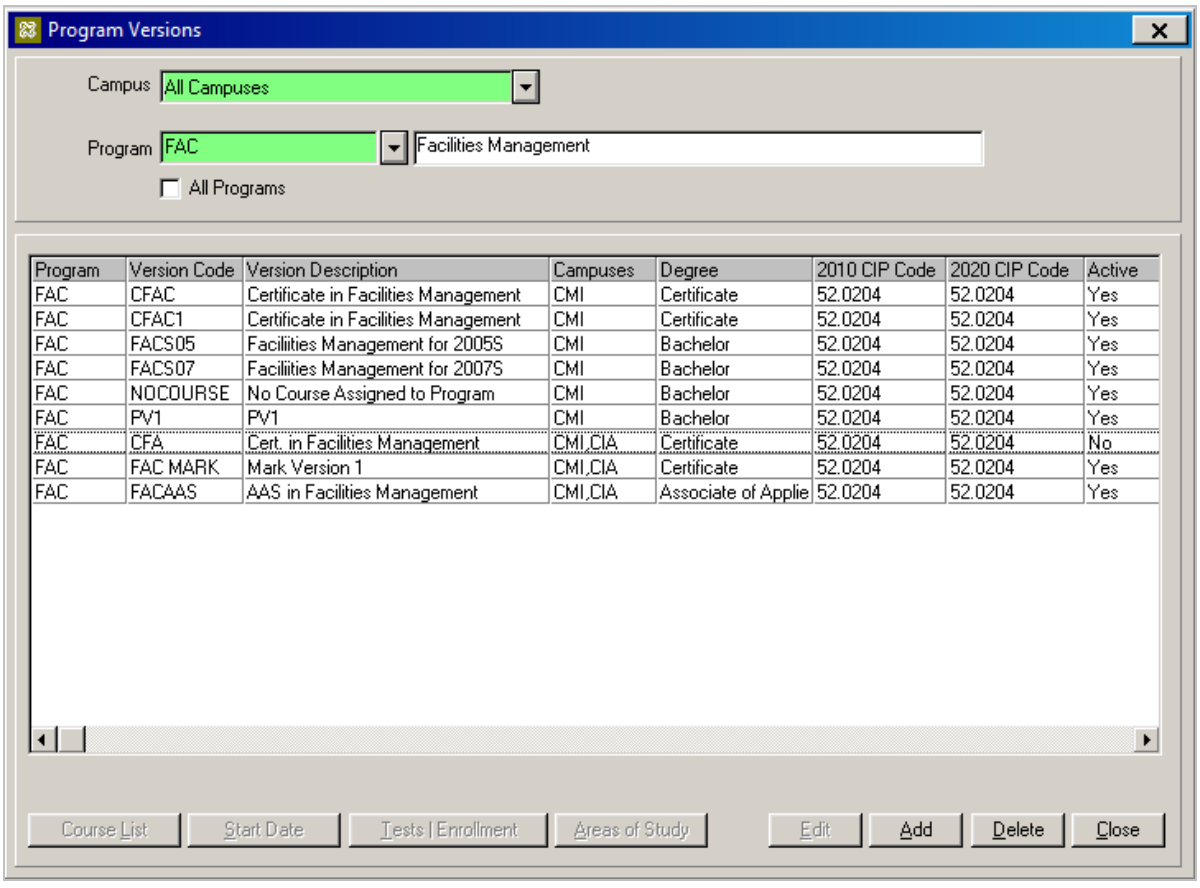
Note: If an attendance record is deleted, the attendance is recalculated, as is the SAP milestone date. Students who have their SAP Milestone date changed are re-evaluated by SAP and an entry in the SAP Audit appears notating that the SAP Evaluation date has changed since the last run of SAP, and it identifies any approved disbursements made prior to the new SAP Evaluation. Any time the status, grade, hours, hours attempted or hours earned fields are modified, CampusNexus Student calculates the actual attendance and updates the adenrollSched record. This action prevents any user from overriding the hours fields with erroneous data. The trigger always calculates the attendance for the hours fields.

Students can view their real time scheduled hours and attended hours on the Degree Progress Audit. When real time scheduling is configured, students can view their real time scheduled hours using the calculation (Attended Hours + Absent Hours) - Makeup Hours up to the Last Day of Attendance (LDA), and they can view their attended hours as of the last date of posted attendance for any course not in a future start or scheduled status.

The Attendance Summary by Program for Clock Hours report calculates real time scheduled hours when a student's program version is enabled for real time scheduling. The Attendance Detail and Attendance Summary reports can also be viewed to obtain information regarding a student's attendance when real time scheduling is enabled. Both reports calculate real time scheduled hours and attended hours. Total Scheduled Hours can be added to the custom user toolbar so that users can have a persistent view of their real time scheduled hours to-date.

To add or edit a program version:

1. On the Programs Code Setup form, click the **Program Versions** button. The Program Versions form is displayed.



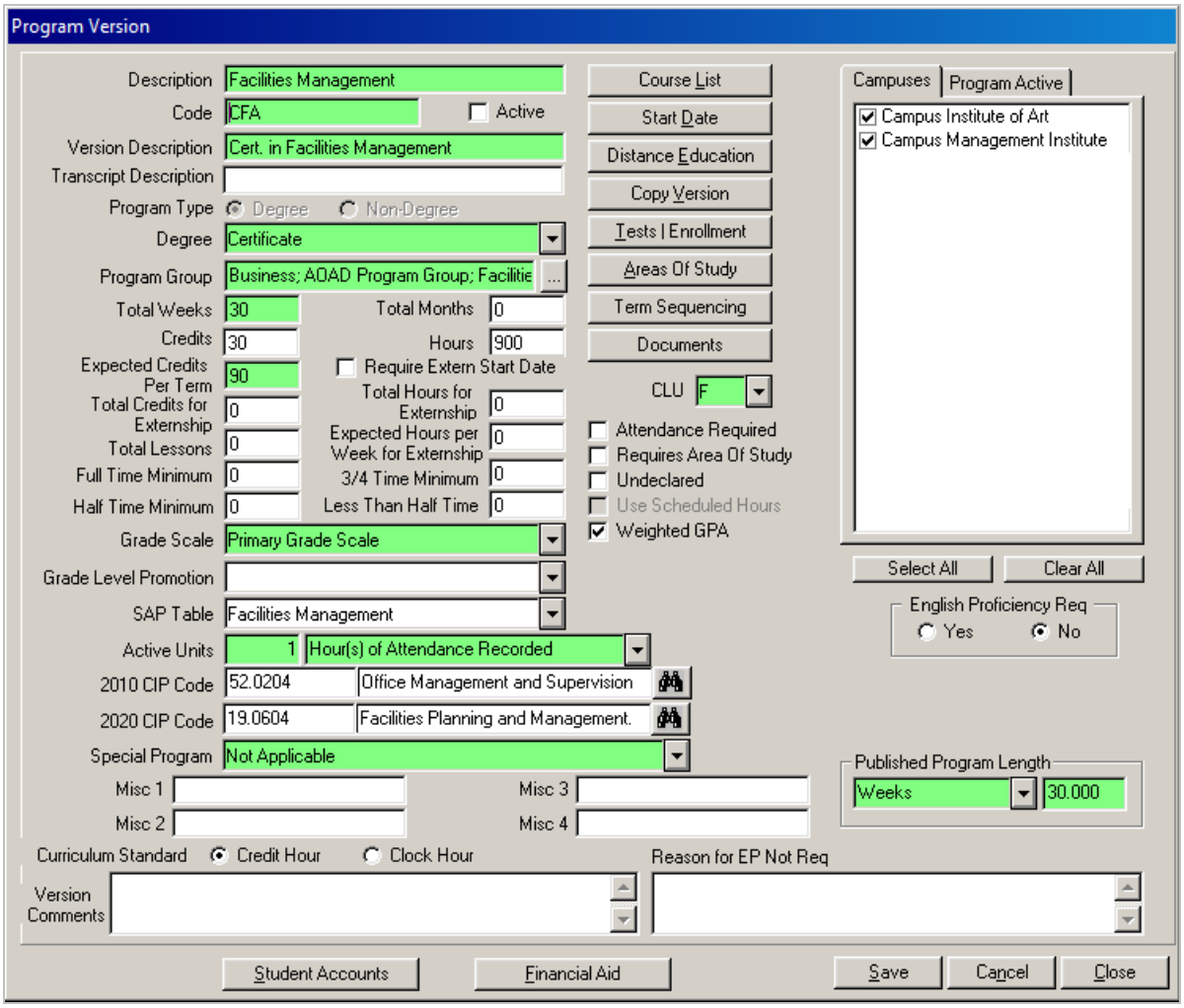
Program	Version Code	Version Description	Campuses	Degree	2010 CIP Code	2020 CIP Code	Active
FAC	CFAC	Certificate in Facilities Management	CMI	Certificate	52.0204	52.0204	Yes
FAC	CFAC1	Certificate in Facilities Management	CMI	Certificate	52.0204	52.0204	Yes
FAC	FACS05	Faciliities Management for 2005S	CMI	Bachelor	52.0204	52.0204	Yes
FAC	FACS07	Faciliities Management for 2007S	CMI	Bachelor	52.0204	52.0204	Yes
FAC	NOCOURSE	No Course Assigned to Program	CMI	Bachelor	52.0204	52.0204	Yes
FAC	PV1	PV1	CMI	Bachelor	52.0204	52.0204	Yes
FAC	CFA	Cert. in Facilities Management	CMI,CIA	Certificate	52.0204	52.0204	No
FAC	FAC MARK	Mark Version 1	CMI,CIA	Certificate	52.0204	52.0204	Yes
FAC	FACAAS	AAS in Facilities Management	CMI,CIA	Associate of Applie	52.0204	52.0204	Yes

2. Select a program from the **Program** drop-down list to view only the versions for the selected program.

   - OR -

   Select the **All Programs** check box to view all versions of all programs.

3. Click **Add**, or select a record and click **Edit**. The Program Version form is displayed.



4. Specify appropriate options. See Field Descriptions.

5. Click Course List to define the list of core and elective courses for the program version.

6. Click Start Date to set up the date parameters for the new program version.

   Note: When adding a program version, the Start Date button is disabled until you save the required information for the new program version.

7. Click Distance Education to set up the Minimum Number of Days Between Lessons and the Maximum Number of Course Extensions.

   Note: When adding a program version, the Distance Education button is disabled until you save the required information for the new program version.

8. Click Copy Version to copy the details of this program version to a new program version.

9. Click Tests | Enrollment to select entrance tests required for this program version.
10. Click Areas of Study to select areas of study for this program version.
11. Click Term Sequencing to define term sequencing.
12. Click Documents to specify any documents required from students enrolled in this program version.
13. Click Student Accounts to select from the following options.
    - **Lists > Billing Methods** - This option displays the Billing Methods Code Setup form.
    - **Lists > Earning Methods** - This option displays the Earning Methods Code Setup form.
    - **Associate Billing/Earning Methods** - This option displays the Program Accounting Parameters form.
14. Click Financial Aid to select from the following options:
    - **Lists > Budgets** - This options displays the Budget Code Setup form.
    - **Associate Budgets** - This option displays the Financial Aid Budgets & Packaging form.
15. Click **Save**.
16. Click **Close** to close the form.

Field Descriptions

Field	Description
Campuses	Select one or more **Campuses**. You are selecting individual campuses, not campus groups. When saving the record, a campus group is dynamically created or updated for the selected campuses. The campus group type is set to 'P' for the new campus group. If you do not have access to a campus in the list, the campus name is enclosed in brackets [ ] and you cannot select or deselect the campus.
Program Active (tab)	This flag controls which program version is available during the application and enrollment processes for the campus. Reports use the Program Active flag to determine whether to display the program versions. Institutions can have program versions that are shared at multiple campuses, and occasionally one of these campuses stops offering one of these versions. When this happens, select in which program version the students may enroll by selecting the applicable campus.
Description	This is the program description that you selected from the list or created on the Program Code Setup form. The program name cannot be edited on this form.
Code	Specify a code that your staff can recognize as representing this program version.
Active	Select or clear the Active check box to designate the record as active or inactive.
Version Description	Specify a description of this program version.
Transcript Description	Specify a description of the program version as is should appear on official and unofficial transcripts for internal or external use. If you do not specify a transcript description, the version description appears on the transcript.

Field	Description
Program Type	Select Degree (default for new program versions) or Non-Degree. Once students are enrolled in a program version, the Program Type options are disabled.
Degree	Select the degree or certificate to be awarded upon completion of this program version.
Program Group	Select one or more program groups to which this program version belongs. Since multiple program group association occurs on the program level, program versions belonging to a program are automatically associated with a program group once it is associated with the program. Program groups are labeled as 'Interest' on the Student Master form. **Note**: The program groups displayed when you click are created on the Setup - Academic Records Lists [Program Group] form. Only the active program groups are displayed.
Total Weeks	Specify the total number of weeks required to complete this program version.
Total Months	Specify the total number of months required to complete this program version.
Credits	Specify the total number of credits required to complete this program version.
Hours	Specify the total number of hours required to complete this program version.
Expected Credits Per Term	Specify the total number of credits the student is expected to complete per term. This value can also be entered for each enrollment in the Progress tab. This value is displayed in the Term Sequencing Enroll Course List form.
Require Extern Start Date	Select this option to include a field for Extern Start Date on several forms where other date information is required. See Start Date and Enroll Student.
Total Credits for Externship	Specify the total credits for any associated externship.
Total Hours for Externship	Specify the total hours for any associated externship. The value must be greater than the 'Expected Hours per Week for Externship'.
Total Lessons	Specify the total number of lessons associated with this program version. This optional field is related to distance education programs and is used in revenue calculations.
Expected Hours per Week for Externship	This field is only used in the graduation date calculation once the student is enrolled in an externship course. The value must be less than the 'Total Hours for Externship'. This value can also be entered for each enrollment in the Progress tab.
Full Time Minimum	Specify the minimum number of credits required for a student to be considered as full time.
3/4 Time Minimum	Specify the minimum number of credits required for a student to be considered as 3/4 time.
Half Time Minimum	Specify the minimum number of credits required for a student to be considered as half time.
Less Than Half Time	Specify the minimum number of credits required for a student to be considered as less than half time.

Field	Description
CLU	Select a Campus License Units (CLU) option: F - Full or H - Half. There are no limitations on full license units. A program version that is set up with half license units is usually for continuing education or distance education that does not require financial aid or degree audits. CampusNexus Student recognizes this lesser requirement and processes data accordingly. If a program version is set up with half license units, the Course List button is disabled.
Grade Scale	Select the grade scale to be used in this program version. When the grade scale for a program version is changed on this form and the Save button is clicked, CampusNexus Student checks for students who are currently enrolled in this program version. If any students are found, the following message is displayed: "*Grade Scale has been changed. There are* `nnn` *students who are Active, Enrolled, or Temporary Out categories in this program version. Do you want to update these students' records with the new grade scale?*" • If you select 'Yes', the enrollment grade scale is updated for each of the enrolled students with the new grade scale specified for the program version. • If you select 'No', the enrolled students continue to have the old grade scale attached to their records. **Note**: A degree seeking student is considered to be currently enrolled if the student's status category is E- Enrolled, A - Active, or T - Temporary Out. For non-degree seeking students, currently enrolled status categories are X - Enrolled and Y - Active.
Grade Level Promotion	Select the grade level promotion rules to be applied to this program version. You can associate grade level promotion rules with a program version independently of the setting to enable automatic grade level promotion for a campus. However, for a student to be automatically promoted based on the criteria defined in the requirements rules associated with a program version, automatic grade level promotion must be enabled for the campus where the student is enrolled .
Attendance Required	Select this option when attendance is mandated by an outside entity.
Requires Area Of Study	Select this option to indicate that students cannot graduate from the program version unless an area of study is declared. If this option is selected, the 'Undeclared' option is disabled.
Undeclared	Select this option to accommodate cases where students begin attending the institution but have not declared a area of study. The 'Undeclared' status serves as a placeholder for incoming students. If this option is selected, the 'Requires Areas of Study' option is disabled.

Field	Description
Use Scheduled Hours	Select this option to configure a clock hour program version to calculate a student's hours using real time scheduling. When a program version is configured for real time scheduling, you cannot configure an Excused Absence Policy. Excused Absence Policies only show program versions that are configured for clock hours. CampusNexus Student prevents users from configuring an Earning Method with a revenue basis of Scheduled Hours when the student's program version is configured for real time scheduling. This feature can only be turned on if no students are enrolled in the program version. Once it is turned on and students are enrolled, it can no longer be turned off. If the 'Use Scheduled Hours' option is not enabled, a tool tip states the reason why it cannot be selected. If real time scheduling is enabled, a weighted GPA cannot be used. **Note**: When this option is selected, the Payment Period Summary form displays the proper amount of time in the 'Hours Att' and 'Hours Sched' fields for students enrolled in clock hours programs. This information matches what is present on the Final Grades form once attendance is posted
Weighted GPA	Select this option if you are using a weighted grade point average to evaluate the student's work in this program version. In clock-hour institutions, CampusNexus Student uses clock-hours instead of credit hours in the weighted GPA calculation. If real time scheduling is enabled, a weighted GPA cannot be used.
SAP Table	Select the SAP table to be used in calculating satisfactory academic progress for this program version.
Active Units	Specify a numeric value in the text box (decimal values are not allowed) and select one of the following options: • Credit(s) have been Registered • Credit(s) Currently Taking • Hour(s) of Attendance Recorded • Lesson Grade(s) Recorded • Day(s) from Term Start Date
2010 CIP Code and 2020 CIP Code	Click to search for a Classification of Instructional Program (CIP) code. The Search CIP Code form is displayed. Select a CIP Code and description to associate with the program version. If a CIP Code was assigned via programs that are associated with the program version, this field is already populated.

Field	Description
Special Program	Select a value in this field to indicate whether the student is enrolled in a Special Program. Valid values are: • B - Bachelors Degree Completion Program • T - Non Credential Teacher Certification Program • N - Not Applicable • P - Preparatory Coursework Graduate Professional Program • U - Preparatory Coursework Undergraduate Program • A - Selective Admission Associated Program This field is displayed for award year 2014-15 and later.
Misc 1 through 4	These are optional fields that your institution can use for extra data collection. They are simple text fields that are not used or reported by the generic version of CampusNexus Student. Your system administrator can change the labels on these fields in the data dictionary under the Setup menu. Crystal Reports can be used to create a custom report to display or print data from these fields.
Curriculum Standard	Select C = Credit Hour or H = Clock Hour. The selected value is stored in the AdProgramVersion.ClockCredit column.
English Proficiency Required	This field accommodates a requirement of the Student and Exchange Visitor Information System (SEVIS) of the Immigration and Naturalization Service (INS). The field is displayed only if your institution accepts international (non-immigrant) students. Select Yes or No.
Reason for EP Not Required	If you select No in the 'English Proficiency Required" field, enter a reason why English language proficiency is not required for the program version. This is a SEVIS requirement.
Published Program Length	Select the measurement value for the program length. The numeric field on the right automatically populates with the total weeks for the existing program version. The drop-down menu can be used to change the program length from Weeks to either Months or Years. The associated numeric total for the new measurement value should then be entered in the numeric field and saved. **Note:** If a user changes the value in the numeric field after the program length is populated and saved, the program length value is not updated, but the user can manually update if needed.

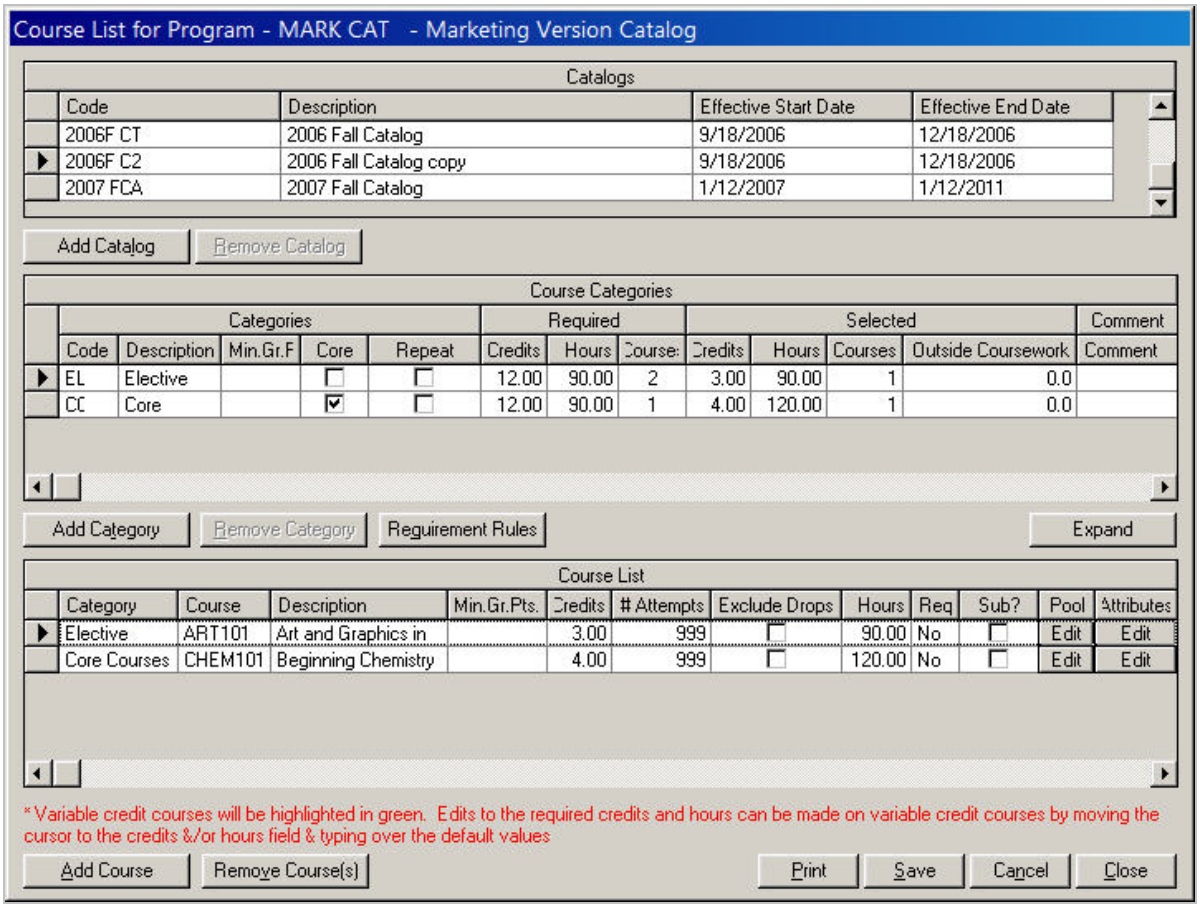
Program Version > Course List

The Course List establishes a list of core and elective courses required for a program version. Catalogs may also be associated with the courses. Courses are selected from a list of available courses for the program version.

Prerequisite: All catalogs, course categories, and courses needed in the program version must be set up.

To add or edit a course list for a program version:

1. On the Program Version form, click the **Course List** button. The Course List for <Program Version> form is displayed.



2. Click **Add Catalog** to associate a catalog with the course list. The catalogs that have been setup for the campus appear in the drop-down list. To set up catalogs, see Enable Catalog and Catalog. Click the **Remove Catalog** button to remove a catalog from the course list.
3. Specify the **Course Categories** for the program version in the middle section of the form.
    a. If the list of Course Categories exceeds the narrow window, click **Expand**.
    b. Click **Add Category** and select the category from the list. After selecting the category, you can edit the description of the category, the required credits, required hours, and required number of courses for the category.
    c. Select **Core** if this category is composed of core courses. The Core box, when enabled, provides a label on

the degree audit for core courses.

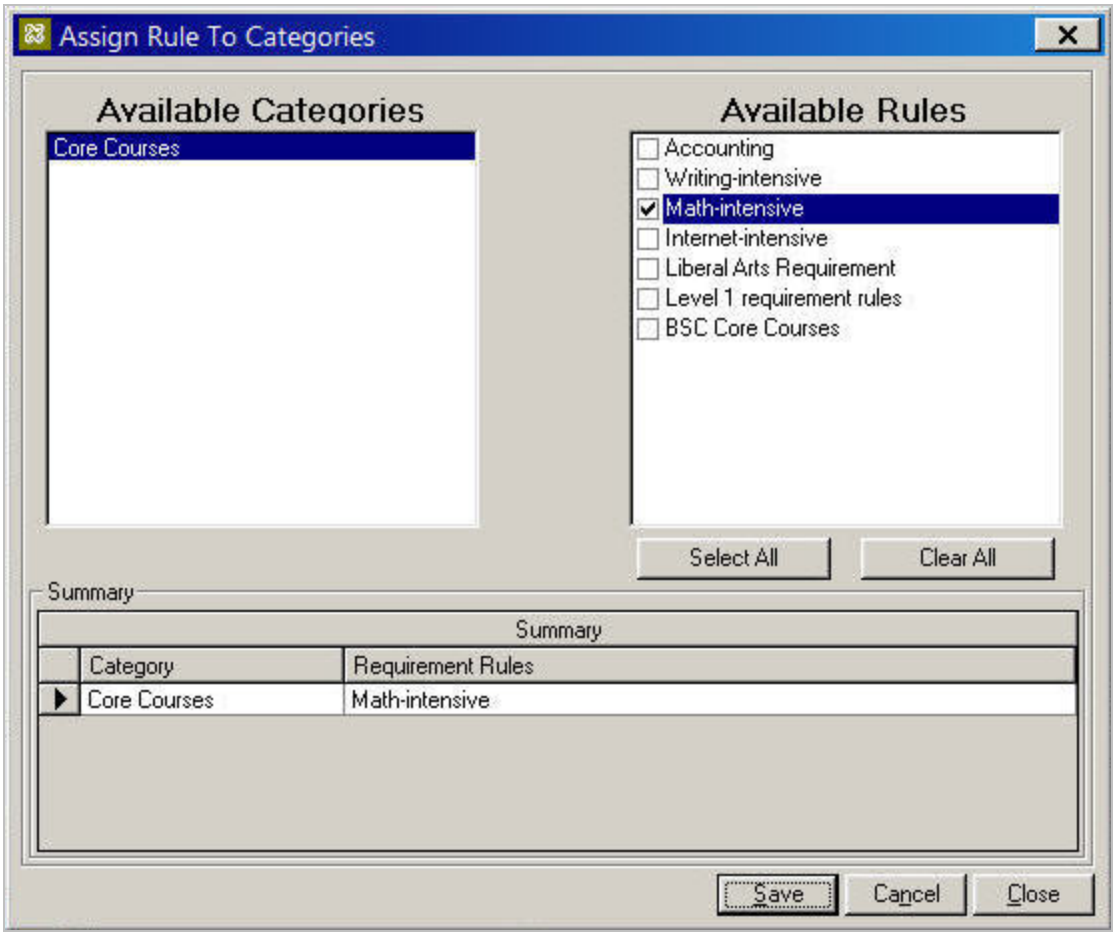
d. Select **Repeat** to flag this category to be added to a student's schedule as future status if dropped.

e. Specify the number of **Required Credits**, **Hours**, and **Courses**. CampusNexus Student fills in the **Selected Credits**, **Hours**, and **Courses** as you select them in the next part of the course list setup.

f. Enter any comments in the **Comment** field.

g. To remove an existing course category, select a category record and click **Remove Category**. When removing a category, if courses are defined for the category, you can remove the related courses or leave the courses on the list. If the courses are left on the list, the category for each course is changed to <unknown>. Each course then needs to be re-assigned to a different category.

h. Click **Requirement Rules**. If you configured Requirement Rules, the available rules are listed in the Assign Rule to Categories form. Select applicable rules.



Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. You are returned to the Course List for <Program Version> form.

Note: The Degree Progress Audit enforces the rules on the program version's course list.

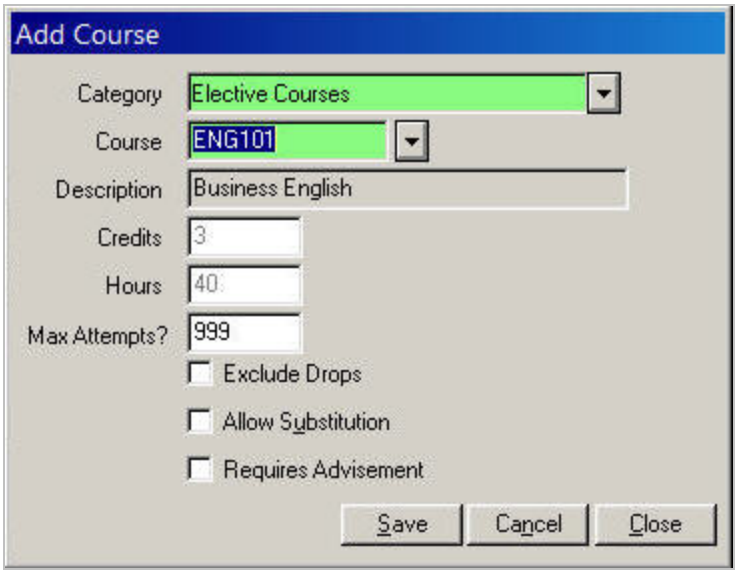
- When the audit encounters a rule assigned to only one category, only the courses from that category (including elective pool courses) are considered when evaluating the degree progress.

- When the audit encounters a rule across course categories, it checks all courses in those categories to determine eligibility for satisfying the rule.

4. Build the **Course List** for the program version in the bottom section of the form.

   As you add or remove courses, the cumulative totals (Selected Credits, Selected Hours, and Selected Courses) are incremented or decremented accordingly.

   a. Click the **Add Course** button. The Add Course form is displayed.



   b. Select a **Category**.

   c. Select a **Course**.

      Note: A course code of *ELECT* indicates that it is a "placeholder" for an elective course to be decided later. When selected, you can enter the credits and hours for the elective. On other courses, you cannot edit the credits or hours columns displayed in the Course List grid.

      Student take a certain number of courses from the elective's substitution pool so that the total credits of taken courses is equal to or greater than the elective course's credit value.

   d. The **Credits** and **Hours** are displayed in read-only mode, unless the course is a variable credit course.

      Variable credit courses are highlighted in green and allow edits to the Credits and Hours fields. Use the Courses Code Setup form to configure credits, hours, and whether the course is a variable credit course.

   e. In the **Max Attempts?** field, specify the maximum number of attempts allowed for this course. The default number is entered automatically.

   f. Select **Exclude Drops** if dropped courses should not be counted towards the maximum number of attempts allowed. You can select this check box on the Add Course form or on the Course List grid.

   g. Select **Allow Substitution** if another course can be substituted.

      Note: Course substitution can occur when viewing a student's degree audit. Each course on the degree audit that has not been scheduled or completed can be modified from the degree audit form by clicking on

the course code. The Degree Audit - Course Detail form is displayed. Substitute a different course (if the course setup on the program version course list allows substitution), select the course to be used for an elective or indicate that the student will be awarded transfer credit for the course. When selecting transfer credit, you can select the college where the student received the credit for the course (this is optional) and enter the transfer grade for the course (only grades that are identified as "transfer grade", under Grade Scale, are listed).

When setting up the courses required for a program version, if a course is an elective, set up the list of possible courses allowed for the elective. If a course is flagged as Allow Substitution, set up a list of courses that are allowed as substitutions for the selected course.

Note: If a student fails a substitute course, the original course is recorded as the failed course instead of the substitute course.

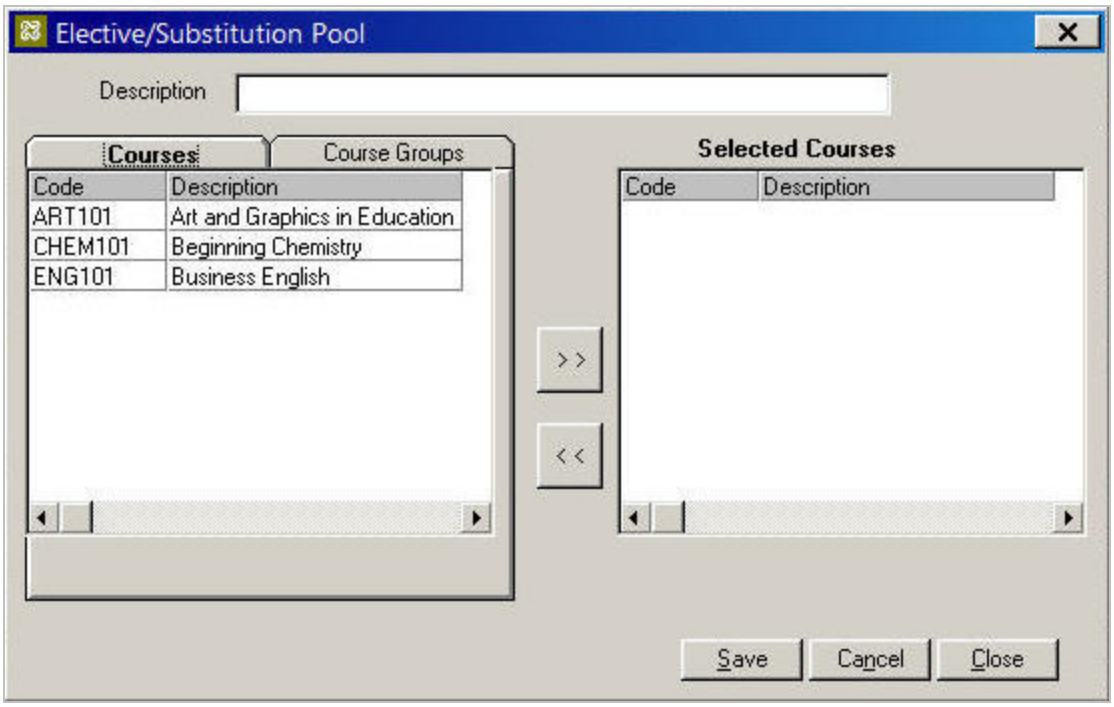
h. Select **Requires Advisement** if the course requires an advisor's intervention.

i. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. You are returned to the Course List for <Program Version> form.

5. To set up a pool of elective courses, select the **Sub?** check box at the far right end of the Course List, and click **Save**.

When the 'Sub?' check box is selected, the Edit button in the **Pool** column on the selected row is enabled.

a. Click the **Edit** button. The Elective/Substitution Pool form is displayed. Use this form to set up the list of courses that are allowed for the elective pool. The form lists all active courses that are not dependent courses.



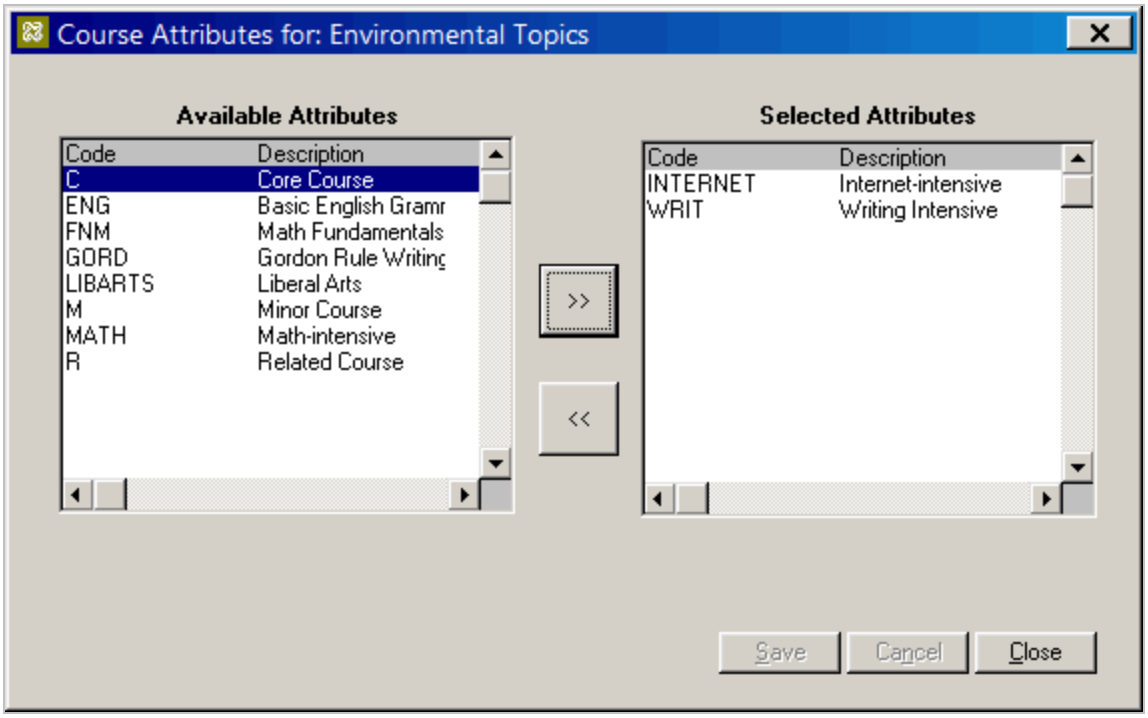
b. Enter a **Description**.

c. Select a course in the **Courses** list (use the **Ctrl** key for multiple selections) and click

>>. The selected courses are moved to the Selected Courses field.

d. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. You are returned to the Course List for <Program Version> form.

6. To edit the course attributes, scroll to the **Attribute** column and click the **Edit** button. The 'Course Attributes for:' form is displayed. All attributes associated with the course at the course list level and attributes associated with the same campus and not associated with the course are listed.



a. Select an attribute from the list of **Available Attributes** and click >> move it to the Selected Attributes field. After saving the changes, the selected course attributes are associated with the course on the program version level.

b. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

7. Click **Remove Course(s)** to remove courses from the list. The totals at the top of the form for selected credits, hours, and courses are adjusted accordingly.

8. Click **Save** frequently while building your course list, but especially before you close the form. After saving a course category or a course in the course list, you are no longer able to modify the course category or the course code.

9. Click **Print** at any time to print a report of your program version course list.

10. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Note: On the Degree Progress Audit form, when selecting the course that the student elects to take, only courses identified as possible electives are displayed. If an elective does not have an elective pool set up, all courses are displayed. This form is displayed when you click on the course code on the Degree Progress Audit form. If the course is in an elective pool, the description of the elective pool is displayed for the course.

Program Version > Start Date

The Start Date Setup form is used to establish the date parameters related to a program version. More than one set of date parameters can be defined for a program version. You can require that students who enroll in a given program version begin the program on a listed start date. See 'Require Start Date' field Academic Records Setup.

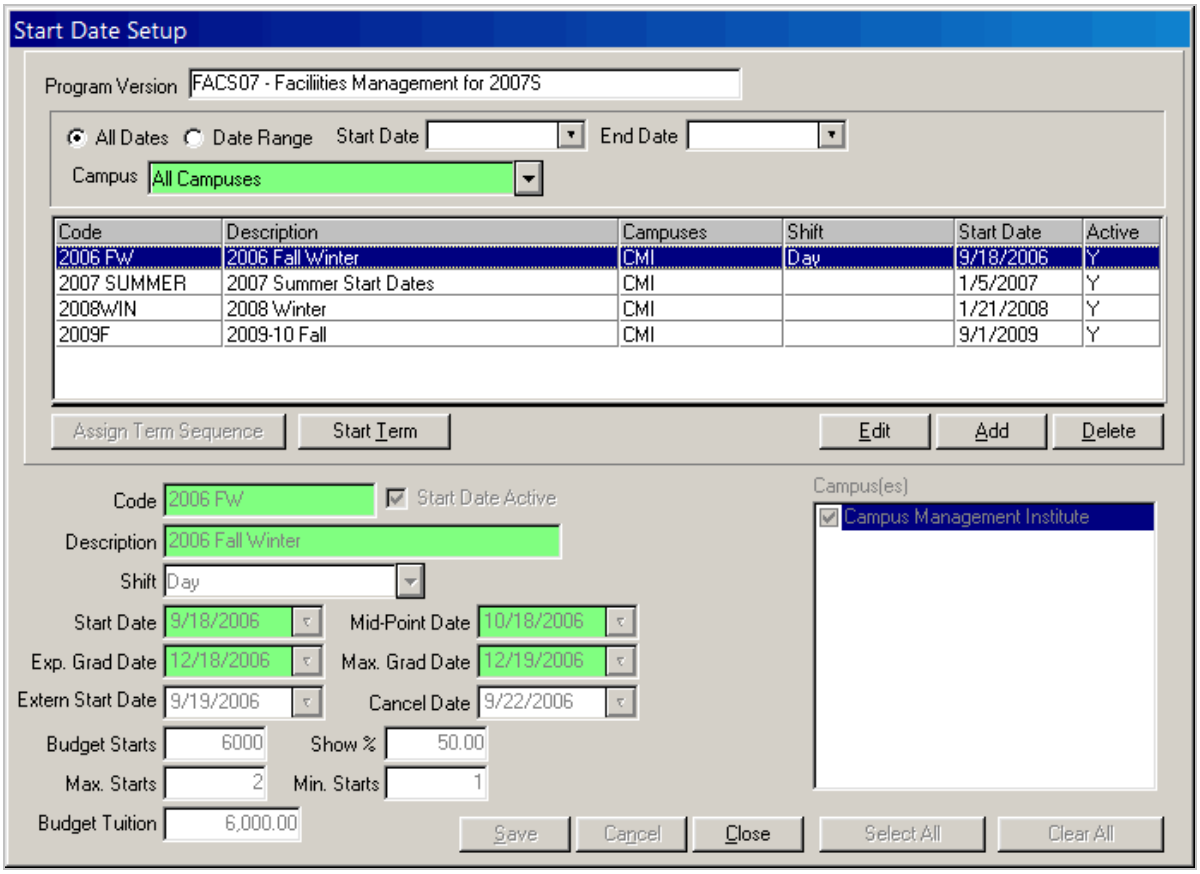
The dates you enter here are used when students are enrolled in the related program version. See the discussion of enrollment procedures for more on the use of these dates.

An additional feature of this form is the enrollment budget. You can enter the minimum number of students required to operate the program, the estimated number of students expected to enroll in the program on this start date, and the maximum number of students that can enroll in the program on this start date.

To add or edit a start date for a program version:

1. On the Program Version form, click the **Start Date** button. The Start Date Setup form is displayed.

   The Program Version field (read-only) displays the program version selected on the Program Version form.



2. Select **All Dates** to view all start dates for the program version.

   - OR -

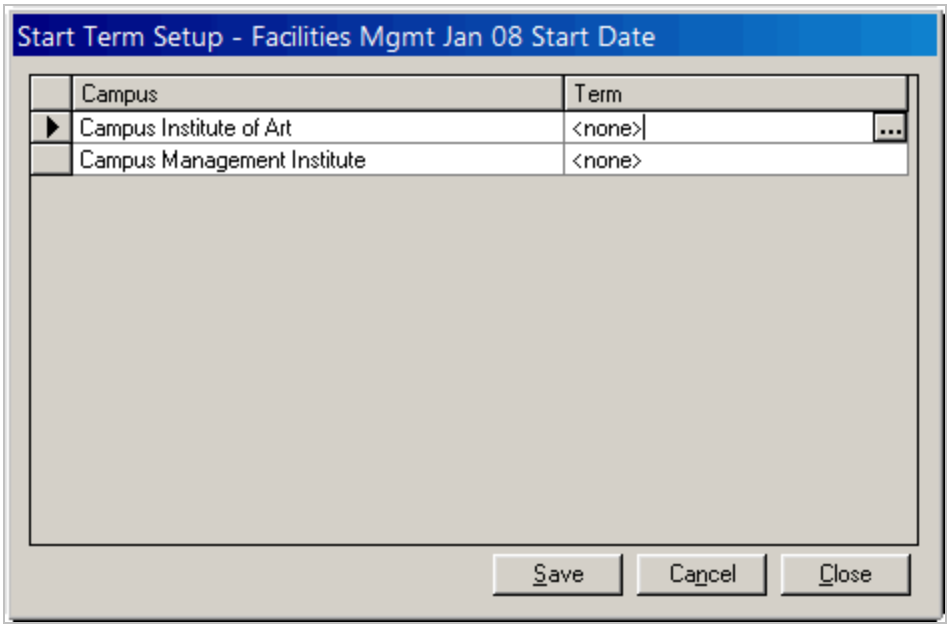
   Select **Date Range** and the applicable **Start Date** and **End Date** to view the dates that fall between the start and end dates selected.

3. From the **Campus** list, select 'All Campuses' or select a specific campus.

4. Click **Add**, or select a record and click **Edit**.

5. Specify a unique **Code**.
6. Select the **Start Date Active** check box to indicate that this start date is available for enrolling students. Clear the check box to deactivate a given set of date parameters when no more students can be enrolled.
7. Enter a **Description**.
8. From the **Shift** list, select the shift, such as day, night, weekend.
9. From the **Start Date** list, select the date on which students begin classes for this program version.
10. From the **Mid-Point Date** list, select the estimated midpoint date for students who enter the program version on the listed start date.
11. From the **Exp. Grad Date** list, select the expected graduation date for students who enter the program version on the start date.
12. From the **Max. Grad Date** list, select the maximum graduation date for students who enter the program version on the start date.
13. From the **Extern Start Date** list select the applicable date if the program version is set up to require an external start date.
14. From the **Cancel Date** list, select a date to stop enrollment for this start date in this program version. The date entered indicates that the program version is no longer offered on this start date. Any students thus far enrolled for this start date must be unenrolled or switched to another start date. This would be the case if you anticipated that you would not make the minimum number of enrollments to support the program version if it were to start on this date.
15. In the **Budget Starts** field, specify the estimated number of starts (enrollments) for this program version on this start date.
16. In the **Show %** field, specify the percentage of the students who said they would start on this date that you expect to actually start. For example, if out of 35 students who signed up to start, you think that all 35 will be in a classroom on this date, specify 100 in the field to represent 100%.
17. In the **Max. Starts** field, specify the maximum number of starts (enrollments) for this program version on this start date. This number indicates the capacity of your institution to accommodate students in this program who wish to start on this date.
18. In the **Min. Starts** field, specify the minimum number of starts (enrollments) required for this program version on this start date. If you do not make this number of enrollments, you may have to enter a cancel date and abort the start of the program version on this date.
19. The **Budget Tuition** number represents the total tuition revenue expected to be earned as result of enrollments for the selected start date. It is used to calculate the Budgeted Tuition on the Starts - Actual vs. Budget report. The default value for Budget Tuition is zero. The default is used if no value is entered.
20. Click the **Assign Term Sequence** button to assign a term sequence to the start date. You can configure only one term sequence per start date, regardless of the number of campuses associated with the start date.

    Note: The Assign Term Sequence button is enabled only if the program version at selected campus is configured to use term sequencing.
21. Click the **Start Term** button to display the Start Term Setup form.



22. In the Start Term Setup form, click the **Term** field for a specific campus and click ....
23. Select a **Term** associated with the campus to apply this start term to the program version start date.

    This start term becomes the first term on the Financial Aid disbursement schedule.
24. Click **Save**. A confirmation message is displayed. Click **OK**.
25. Click **Close** to close the form. You are returned to the Start Date Setup form.
26. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

To delete a start date:

1. Select a start date from the Start Date grid and click the **Delete** button.

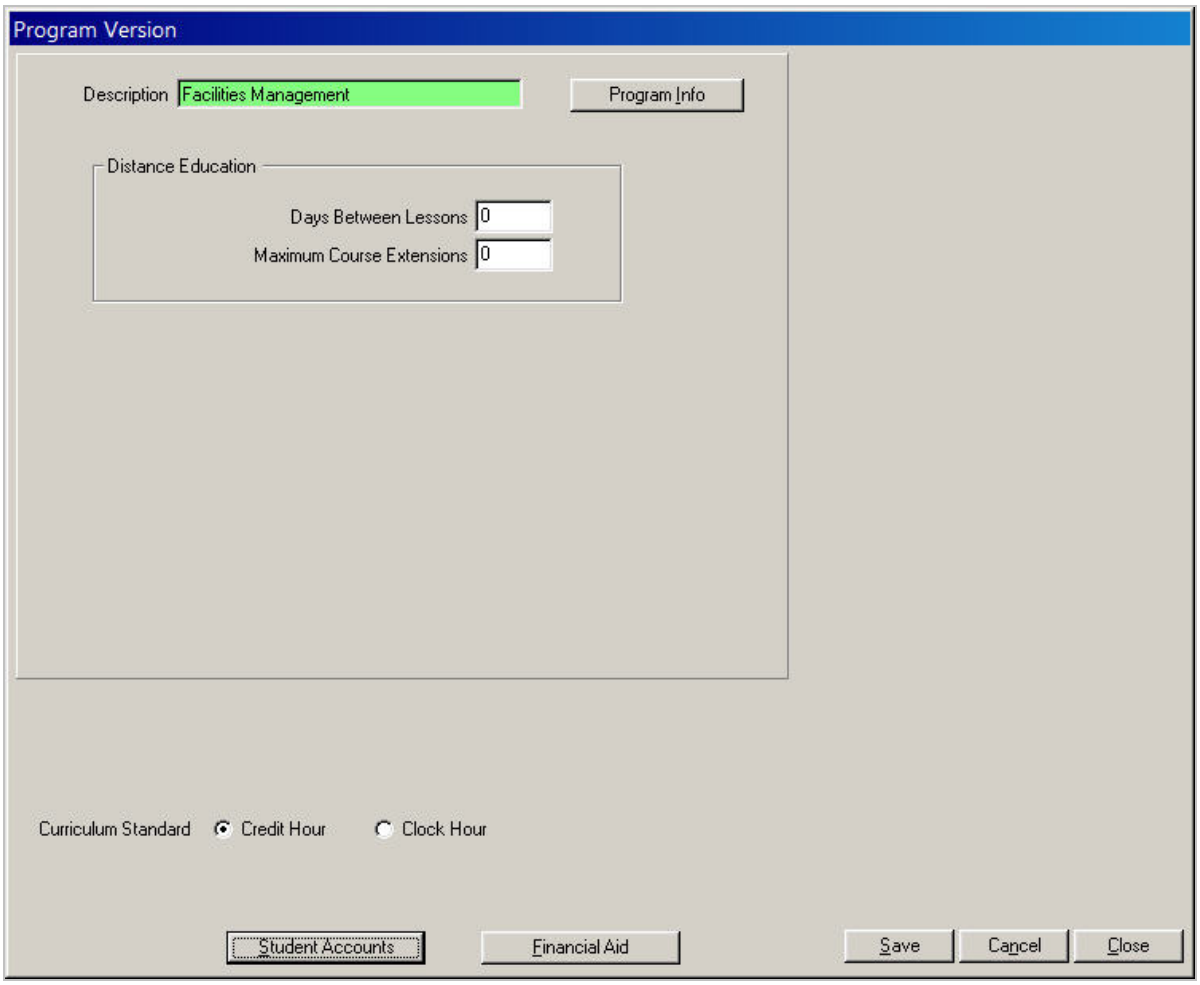
   Note: If students are enrolled in the program version with the selected start date, a message is displayed indicating that the start date cannot be deleted.
2. Click **OK** to return to the previous form.

Program Version > Distance Education

Lesson management in distance education is affected by the values defined for the days between lessons and the maximum course extension. This data is optional for programs that do not record lesson receipts or grant extensions on lesson completions. See also Student Accounts and Financial Aid.

To set the distance education variables:

1. On the Program Version form, click the **Distance Education** button. An extension of the Program Version form is displayed. The Description field (read-only) displays the name of the selected program.



2. Click the **Program Info** button to view the associated program version information. Click Distance Education to return to the previous form.
3. Specify the minimum **Days Between Lessons**.
4. Specify the **Maximum Course Extensions**.
5. Select **Credit Hour** or **Clock Hour** as the Curriculum Standard.
6. If applicable, click the **Student Accounts** and **Financial Aid** buttons for the Program Version > Method Selection.
7. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

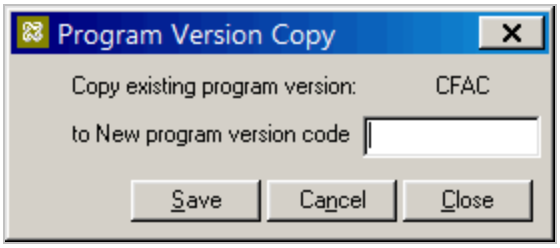
Program Version > Copy Version

You can copy a program version. The copied version is assigned a new program version code. You can edit the attributes of the copied version.

When copying a program version to another version code, a new campus group is created for the new program version code. This allows you to edit the campus list for the new version code without affecting the original program version.

To copy program version:

1. On the Program Version form, click the **Copy Version** button. The Program Version Copy form is displayed.



2. Specify a unique **Code**.
3. Click **Save**. A confirmation message is displayed. Click **Yes**.
4. The program version is copied. A confirmation message is displayed. Click **OK**.
5. To edit the copied program version, navigate to **Lists > Academic Records > Programs**, double-click the program record, and click the **Versions** button. Select the new program version and edit the description and other data as needed.

Program Version > Test | Enrollment

The test list for program versions is used to indicate that certain tests are required of students who enroll in the program version. Previous education can be used to qualify which tests and scores are required. You can select one or more tests from the list of tests and specify a required minimum score for each test.

This form is similar to the pre-enrollment Test List for programs. Differences include:

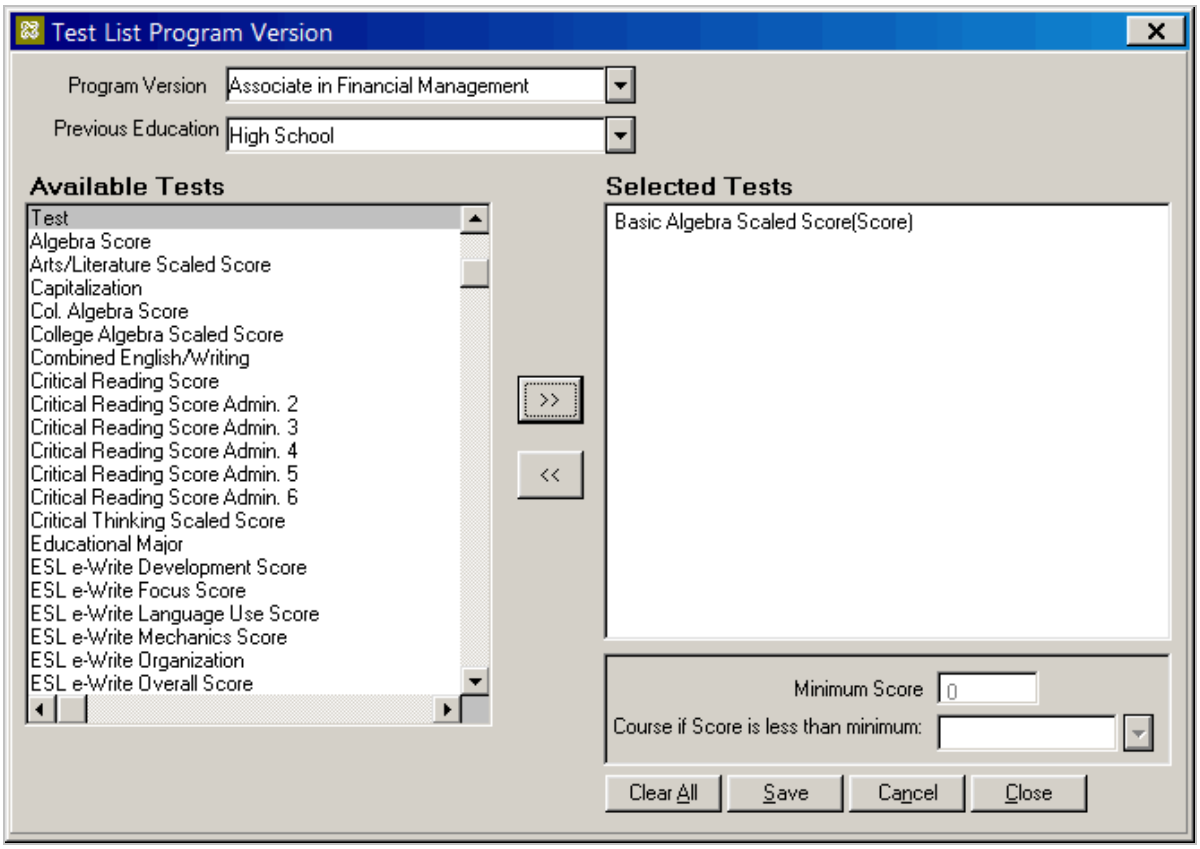
- There is no Campus Group field on this form.
- Program Version replaces Program.
- When updating the selected tests, CampusNexus Student populates the Test By Program Version table.

Prerequisite: The list of available tests must created. See Test Setup.

To add or edit a test list for a program version:

1. On the Program Version form, click the **Test | Enrollment** button. The Test List Program Version form is displayed.

   The Program Version field (read-only) displays the program version selected on the Program Version form.



2. Select a **Previous Education** option.
3. Select a test from the list of **Available Tests** and click >> to move it to the **Selected Tests** field.
4. Specify a numeric value for the acceptable **Minimum Score** for the test.

   Note: The Type of the test selected must be 'Score', otherwise the Minimum Score field is disabled.
5. In the **Course if Score is less than minimum** field, select a course to be assigned to any student who fails to

reach the minimum score on the selected test. The course will be added if the course is not already included in the student's course schedule when the student's score is below the minimum value.

Note: The Type of the test selected must be 'Score', otherwise the Minimum Score field is disabled.

6. Select additional test as needed and specify corresponding test score requirements.
7. To remove a test from the list, select it in the **Selected Tests** box, and click to move it back to Available Tests field.
8. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Program Version > Areas of Study

A flag can be added on the program version level to indicate if the program version requires the student to select an area of study to graduate.

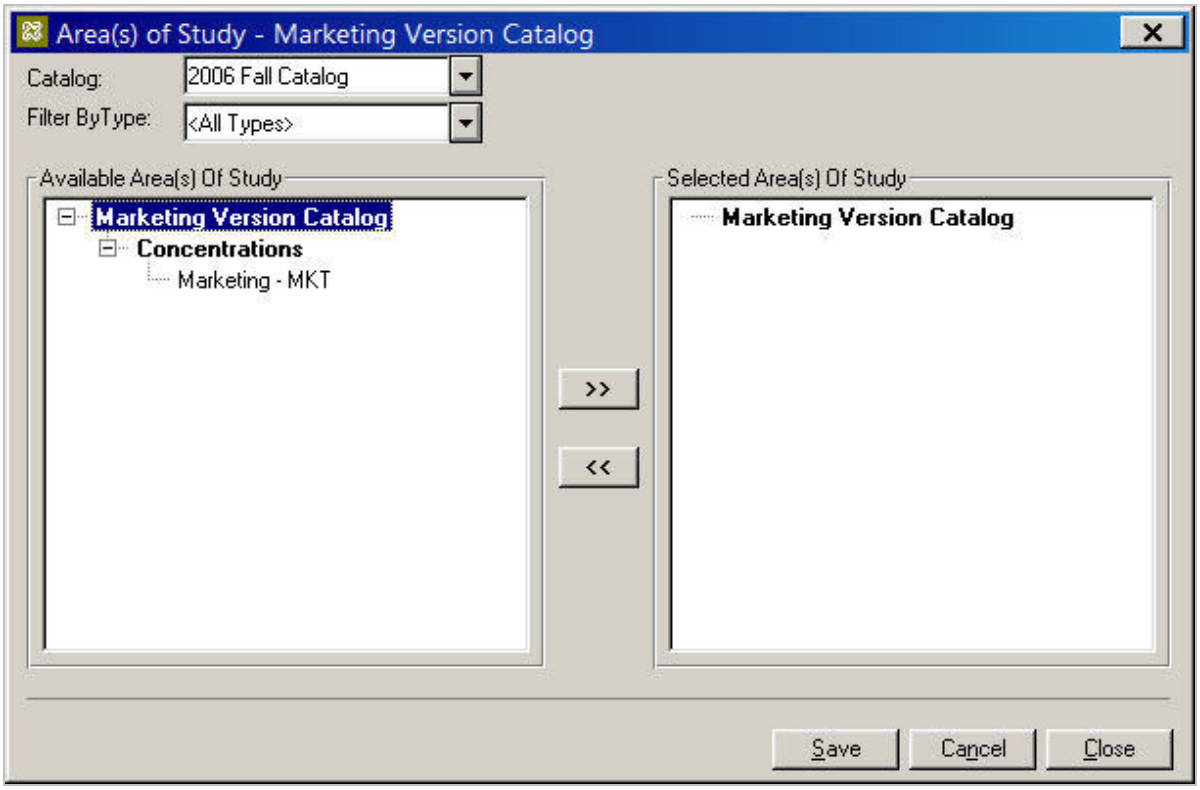
To configure a program version to require an area of study:

1. On the Program Version form, select the **Requires Area of Study** check box to if students need to declare an area of study to graduate from the selected program version.
2. Click **Save**.

To associate an area of study with a program version:

Students can select multiple majors, minors, and concentrations for their degrees. This configuration allows you to create a filter for which majors, minors, and concentrations can be associated with a student enrollment.

1. On the Program Version form, click the **Areas of Study** button. The Area(s) of Study form for the selected Program Version is displayed.



2. Select the **Catalog** associated with the program.
3. Use the **Filter by Type** field to configure areas of study allowed for students enrolled in the program version. Select components for the area of study.

   The form displays the filtered areas of study in a tree structure. If the component is of Type 'Major' and has concentrations attached, CampusNexus Student adds the concentrations to the tree automatically. In the tree view, the root is the student program version/degree; the branches are the areas of study.
4. Select the **Available Area(s) Of Study** to be associated with the program version and click

to move your selection to the Selected Area(s) Of Study field.

5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. You are returned to the Program Version form.

To enroll a student into a program version:

At the time of enrollment a student may have selected a Major. If so, the Enrollment Wizard allows you to select the Area of Study to associate with the student's program version.

To transfer a student from an undeclared program to a declared program:

A student enrolled in a program version that is 'Undeclared' cannot graduate until being moved to a program version that is 'Declared'.

Navigate to the Enrollment form. See Transfer Enrollment for step-by-step instructions on completing the Transfer Enrollment Wizard. After the Transfer Process is completed, CampusNexus Student updates the Undeclared Program with the Declared Program.

Note: No new enrollment record is created.

Program Version > Term Sequencing

Sequencing a program allows an institution to organize a program version's courses and academic terms using a grid format to layout a suggested or required course order for students. When a student is enrolled, CampusNexus Student calculates the course sequence based on the program version course list configuration. You can edit the calculated course sequence for each enrollment if necessary.

You can specify the term sequence for each start date attached to a program version and specify the number of terms in an academic year. This data is used to calculate the academic year start and end dates for each academic year record created for a student at time of enrollment. Additionally, you can define the number of terms worth of courses to display for each program version during online registration.

You can set up the term sequence at the Program Version level and at the Program Version Start Date level.

a. The first level of sequence setup runs on the program version level, which allows the institution to set up a general course sequence within a specified number of placeholder terms. This course and generic term sequence (template) can be copied to the start date level where specific academic terms are selected. Term sequences and their courses can also be copied to other program versions and their start dates. The term sequence does not need to contain any or all courses for the program version.

b. The second level of sequence setup runs on the program version's start date level. The Program Version Sequence Template can be copied to the start date's sequence, allowing the generic placeholder terms to be converted to academic terms, while retaining the course selections made at the program version level. You can select the start term from a list of academic terms whose start dates are a configurable number of days prior to or after the program version start date.

Expected credits per term are defined for each sequence and are copied when a sequence is copied to a program version or to a start date. The total number of credits required to complete the program version can be viewed during term sequence setup, but they are not copied when the sequence is copied; this information is pulled from the program version configuration.

Once the academic term is defined, all subsequent terms are populated by campus based on total credits and expected credits per term. CampusNexus Student populates the placeholder terms with real academic terms that you can then modify.

The Term Sequencing Template displays the courses defined in the Program Version's Course List at the top of the pane. For each course, the Category, Course Code, Course Description, Credits, Hours, and Max # of Repeats are displayed.

Note: For variable credit courses, the Credit and Hours fields are populated from the program version course list instead of the Course Code Setup.

These courses can be dragged from the program version course list onto the grid area with the program version or start date level of sequencing. The Term Sequencing Template also contains placeholders for student electives, allowing all terms for the program version to be created and populated with credits even before the course name is known.

Institution can define the number of future courses (within the sequence) that are displayed to the student during online registration. They can also prevent registering students from deviating from the course and term order by selecting the 'Lock Courses in Horizontal/Vertical Track' check box. Additionally, institutions can enforce 'track' rules across terms on the sequence, so that a sequence has an order of terms and courses, with a track order to its courses.

- If students place out of one course (due to credits transferred or tests passed) in the track and therefore have a free slot in their term, they are required to take a specific course in the next term that is part of that same track.
- If they place out of two consecutive terms' worth of courses in a track, they have to take a track course in the second term from now rather than the next term from now.

Based on the assumption that one course per track is required per academic term, these tracks do not automatically override the prerequisite criteria set on a course.

When a student is enrolled (in a program version and start date), a copy of the program version's start date term sequence is copied to the student level for the student to handle any deviation from the default term sequence during course registrations. Changes made to the start date term sequence after this point have no effect on the student's term sequence.

CampusNexus Student can recalculate the student's term sequence at any point. If the student is registered into a locked vertical term sequence and the student registers for more or less credits than the 'Expected Credits per Term' configured on the program version, the following events trigger a recalculation of the student's term sequence:

- Student re-enters the program.
- Student's transfer credits are posted. CampusNexus Student removes credits required from the end of the program. Track rules, if selected by the institution, are enforced.
- Student tests out of a course.
- Student transfers into a program.
- Student registers for classes.

When any of the above conditions are met, CampusNexus Student recalculates the student's sequence of terms to reflect the new event, such as the re-entry date, etc. Viewing the student's term sequence from the student schedule will verify the recalculation.

If a student is not registered into a locked vertical term sequence and the student registers for more or less credits than the Expected Credits per Term configured on the program version, CampusNexus Student recalculates the term sequence and adds or subtracts terms at the end of the program if necessary. CampusNexus Student assume that all subsequent terms will contain at least the Expected Credits per Term as defined on the program version. Again, viewing the student's term sequence from the student schedule will verify the recalculation.

The Locked Term Sequence report (Reports > Academic Records > Locked Term Sequence Courses) can be generated to help the institution with scheduling by displaying which courses are expected in the next 'n' number of terms for a specific program version, provided that they have a locked courses sequence configured on the term sequence. The sequence will also recognize the same logic that is used by degree audits for repeats and course history.

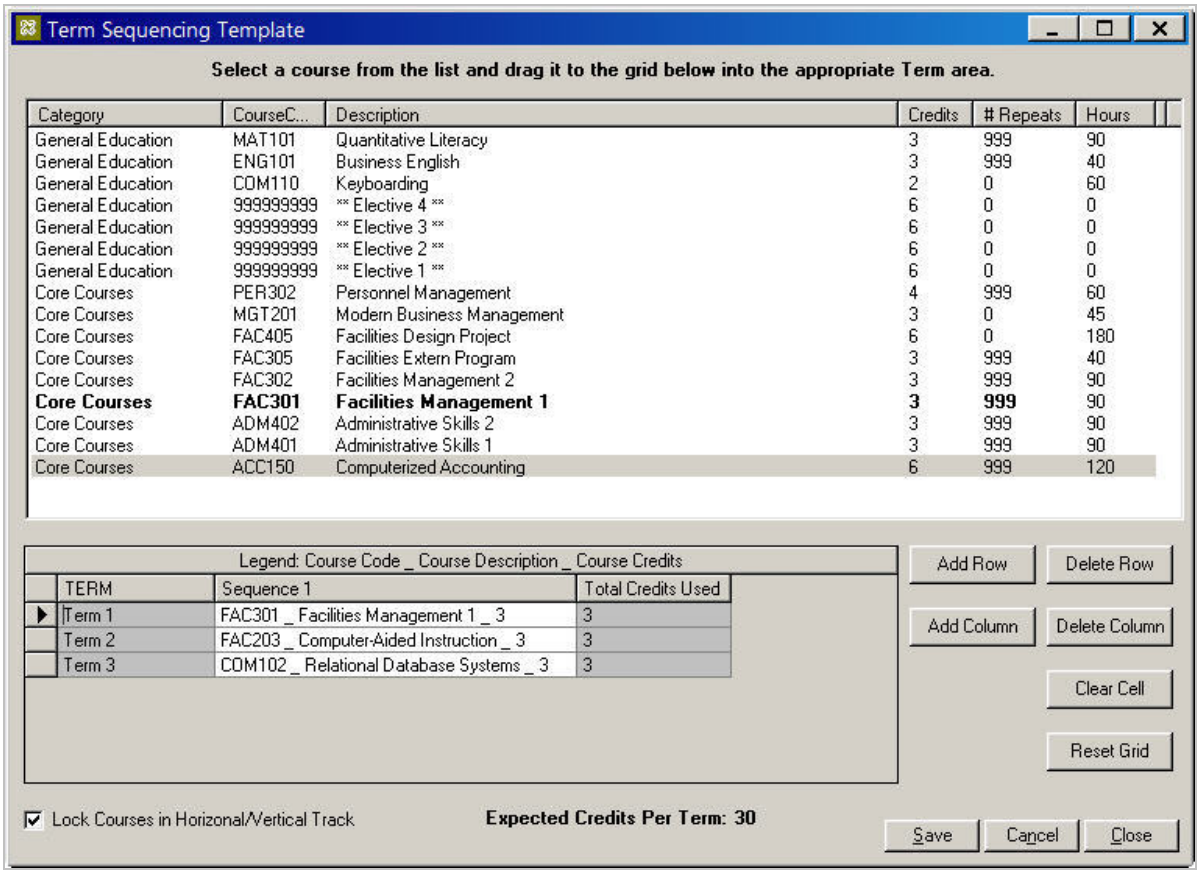
The following tasks are associated with term sequencing:

- Configure expected credits per term
- Assign a term sequence
- Create a term sequence
- Replace generic term placeholders with actual terms
- View a student's term sequence

To configure expected credits per term for a program version:

For term sequencing to work properly, you must define the expected credits or courses per term for a program version. CampusNexus Student calculates of the number of terms a student will be enrolled in based in this information.

1. On the Program Version form, specify the number of **Expected Credits per Term**.
2. Click **Save**.
3. Click the **Term Sequencing** button. The Term Sequencing Template is displayed. Notice that the bottom of the template displays the Expected Credits Per Term value entered on the Program Version form.



The Term Sequencing Template contains the placeholder term sequence for a program version. This sequence of terms does not contain school-defined terms but contains placeholder terms that represent the number of terms that a typical student enrolled in that program version uses to complete the program.

Term Sequences Not Associated With Courses or Parts of a Term

You can set up term sequences for programs without associating them with courses or parts of term. If you choose this option, the following applies:

- You can define program version term sequences without associating courses with a term.
- You can associate term sequences with program version start dates without courses.
- If Term Relationships are used, you can associate parent terms with term sequences associated with a program version start date.
- If term relationships are not used, all terms may be associated with a program version start date. CampusNexus Student displays all active academic terms when allowing users to select terms. In addition, all terms that are active and have the 'Registration/Attendance' usage selected may be associated with a program version start date if term relationships are not used.
- When a term sequence is associated with an enrollment record, the term sequence is evaluated first when determining the correct parent term to associate with a child term that is initially registered into for institutions where term relationships are configured. If a parent term for the child term registered into cannot be derived using the term sequence associated with the enrollment, existing logic for selecting the correct parent is executed.

Note: The parent term may be explicitly selected as part of the registration process in Portal and CampusNexus Student.

- The Rebuild Term Relationships option is modified to incorporate term sequences. When determining a parent for a child term, the configured term sequence for the enrollment record is evaluated first.
- When using Term Registration, if a student has term sequencing configured for the enrollment, the student should not be able to be registered into a Parent Term that is not included in the student's configured term sequence.
- When using Batch Registration, if a student has term sequencing configured for the enrollment, the student should not be able to be registered in to a parent term that is not included in the student's configured term sequence. Subsequently, an entry is made on the Batch Registration Exception report indicating that the student could not be registered.

Things you should know

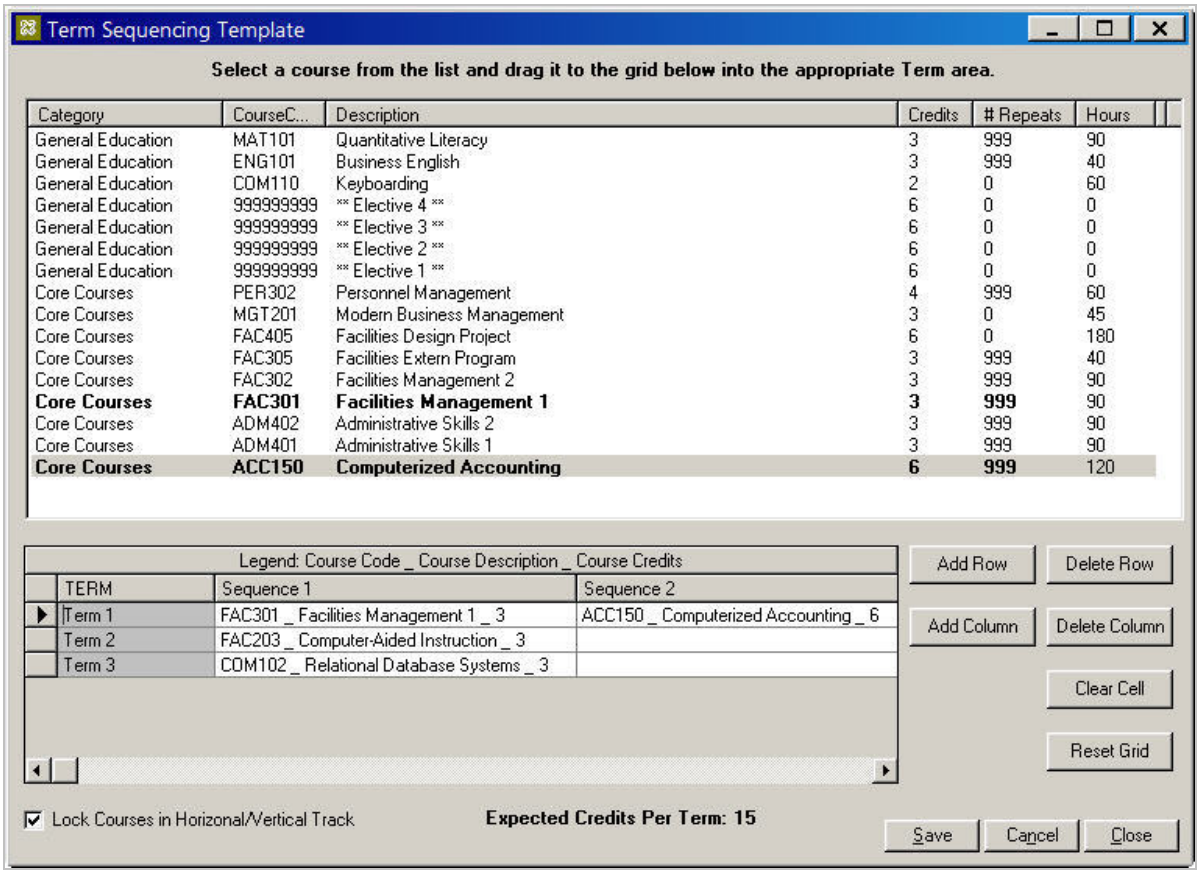
- Term sequences are not enforced within internal registration.
- If an institution uses term relationships, Financial Aid, Student Accounts, or Reporting terms are defined as parent terms, while Academic terms are defined as child terms. All child terms must have start and end dates falling within their parent terms.
- If an institution uses term relationships, the forms display only the parent terms.
- If an institution is not using term relationships, the forms display only the child terms.

To create a term sequence that is not associated with a course:

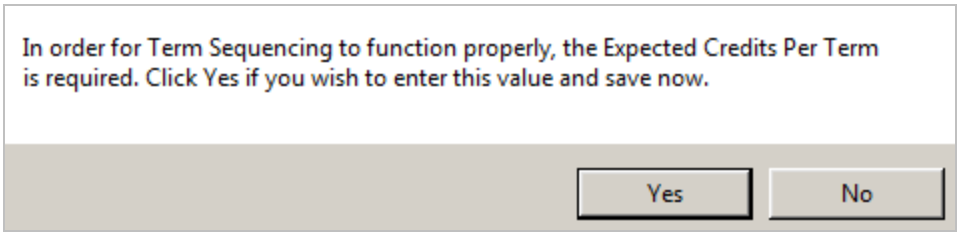
A program version is configured as follows on the Program Version form:

- 90 Credits
- 15 Expected Credits Per Term

The term sequence form presents the number of terms needed to meet the 90 credits and 15 expected credits per term. Once you have recorded the term sequence for the program, set up Start Dates for the program version.



You must enter both values before entering the Term Sequence Template form, otherwise CampusNexus Student displays the following error message.



Click the **Save** button to record the term sequence for the program.

To create a term sequence from the program version setup:

1. On the Program Version form, click the **Term Sequencing** button. The Term Sequencing Template form is displayed. The top pane displays all the courses in the program version's Course List.
2. Select a course in the top pane and drag it onto an empty cell in the term sequence grid. After the course has been added to the grid, it becomes bold in the top pane.

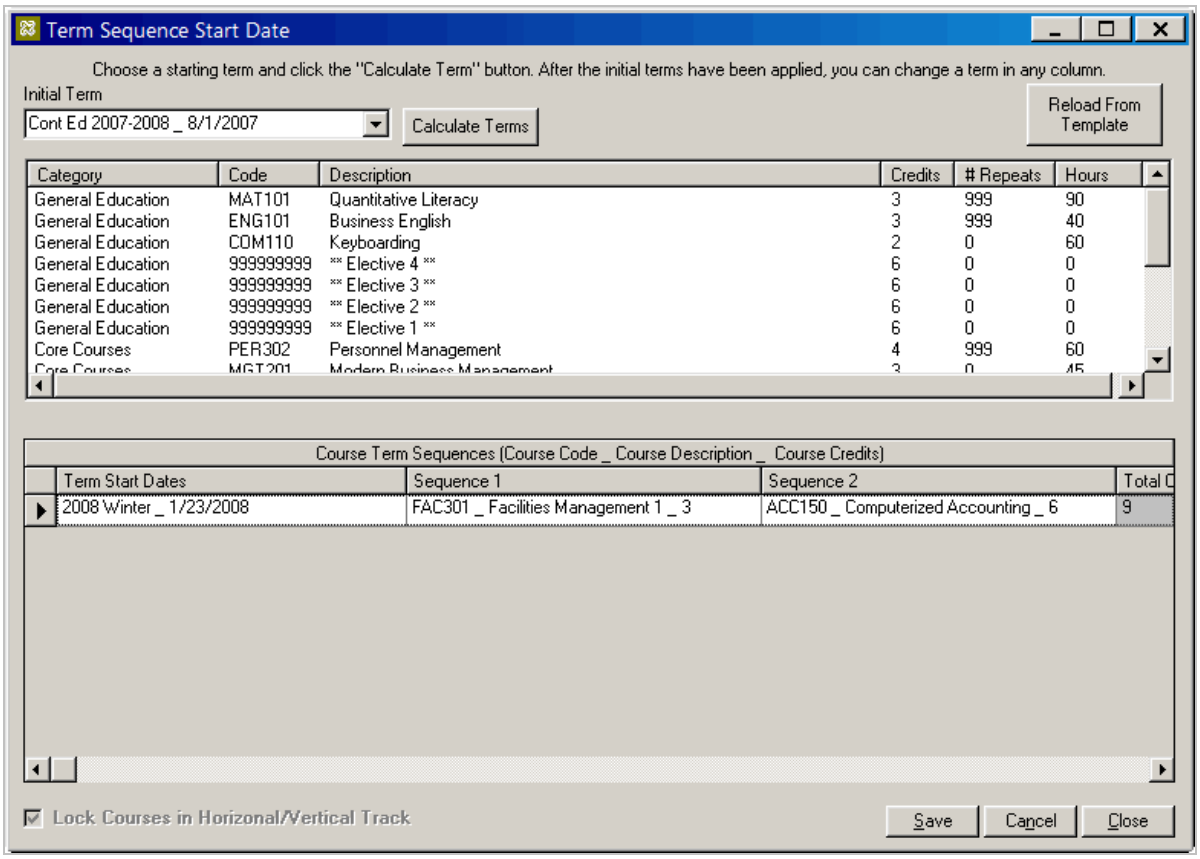
   When an elective course contains a credit value greater than the credit value of a term sequence cell, it can be moved to the grid. The elective course is still displayed in the top pane, but its credit value is debited the amount of one cell in the term sequence grid. This elective course remains in the top pane until all of its credits are debited.
3. Click **Add Row** to add a new Term row in the grid. Each row shows a running total of Credits added to the row. The

bottom of the form shows the number of Expected Credits Per Term as defined on the program version setup.

4. Click **Add Column** to add a new Sequence column in the grid.
5. Select and drag a course from the Term Sequence grid to the Course pane. Notice that the course disappears from the grid and appears in the Course pane.
6. Click **Delete Row** to delete a Term row in the grid. You must **Save** or **Cancel** any pending changes before attempting to delete a row or column.
7. Click **Delete Column** to delete a Sequence column in the grid. You must **Save** or **Cancel** any pending changes before to attempting to delete a row or column.
8. Click **Clear Cell** remove the contents of a cell in the grid. If a course populates the cell, it returns to the Course pane.
9. Click **Reset Grid** to clear the grid.
10. Click **Save** to save the Term Sequence created to the program version. The Term Sequence does not need to contain any courses or all courses for the program version.

To replace generic term placeholders in the term sequence with actual terms:

1. On the Program Version form, click the **Start Date** button. The Start Date Setup form is displayed.
2. Select a term and click **Assign Term Sequence**. The Term Sequence Start Date form is displayed. If no term sequence information was saved for the start date, the Term Sequence Start Date form is populated with the information present in the program version's term sequence.



3. Select a Term for the first row of the grid from a list of Active Terms for the campuses for the Program Version's Start Date. Only terms that are associated with all campuses for the program version are displayed.
4. Click **Calculate Terms** after the initial Term is selected. CampusNexus Student populates subsequent row headers with successive actual terms that do not overlap. The term sequence is populated with actual institution-defined terms along the vertical axis of the grid.

   CampusNexus Student always uses the first assigned term to calculate the population of subsequent rows. You can select alternate terms for any row header. Any subsequent terms are recalculated to not overlap or precede a previous term in the sequence.
5. Select **Lock Courses in Horizontal/Vertical Track** to set up vertical tracks for the Term Sequence.

   The Term Sequence has an order of terms and courses, but it also has a track order to its courses. If 'Lock Courses in Horizontal/Vertical Track' is selected, the following conditions apply if students place out of a course:

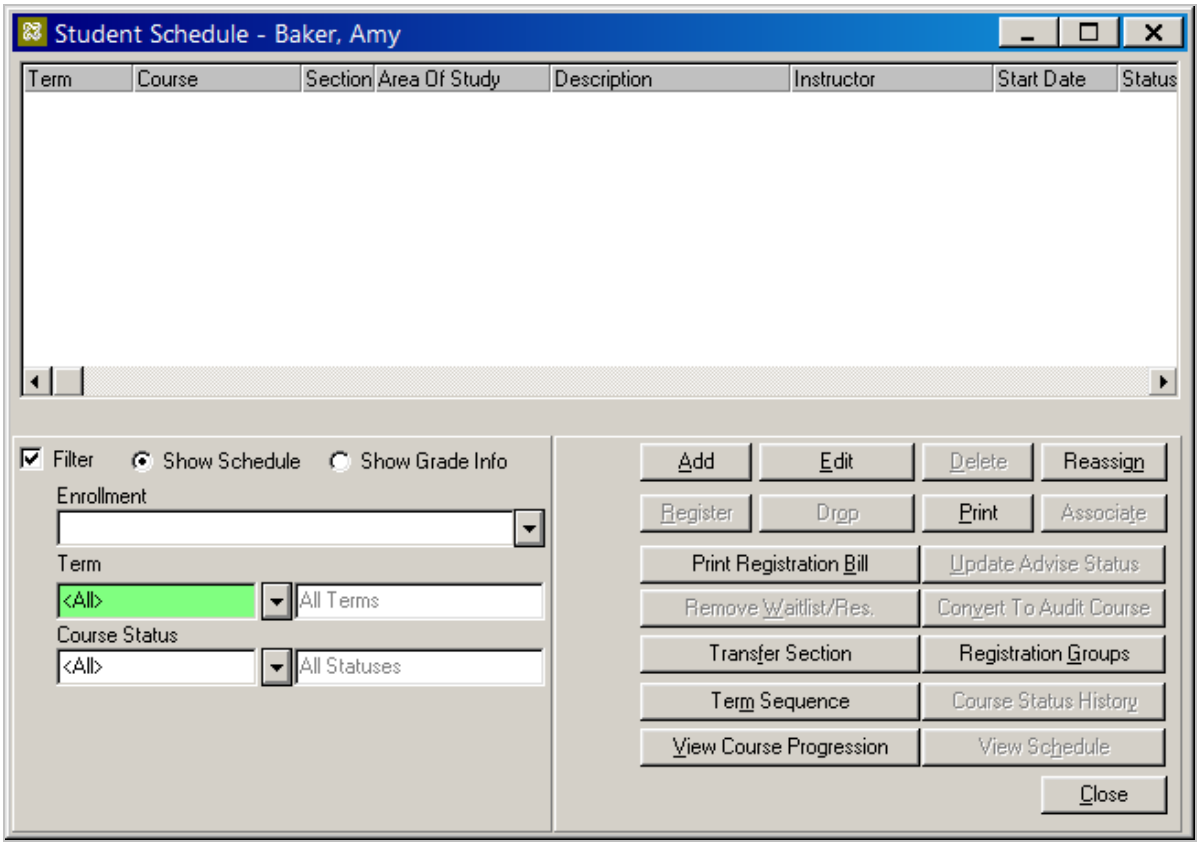
   - If students place out of one course (due to credits transferred or tests passed) in the track and therefore have a free slot in their term, they will have to take a specific course in the next term that is part of that same track.
   - If students place out of two consecutive terms' worth of courses in a track, they will have to take a track course in the second term from now rather than the next term from now.

   Based on the assumption that one course per track is required per academic term, these tracks will not automatically override the prerequisite criteria set on a course.
6. Click **Save**.

Note: When a student enrolls into a Program Version and is assigned a Start Date that has been configured with a Term Sequence, a copy of the Program Version's Start Date Term Sequence is copied to the student level. Changes made to the Start Date Term Sequence after this point will have no effect on the student's Term Sequence.

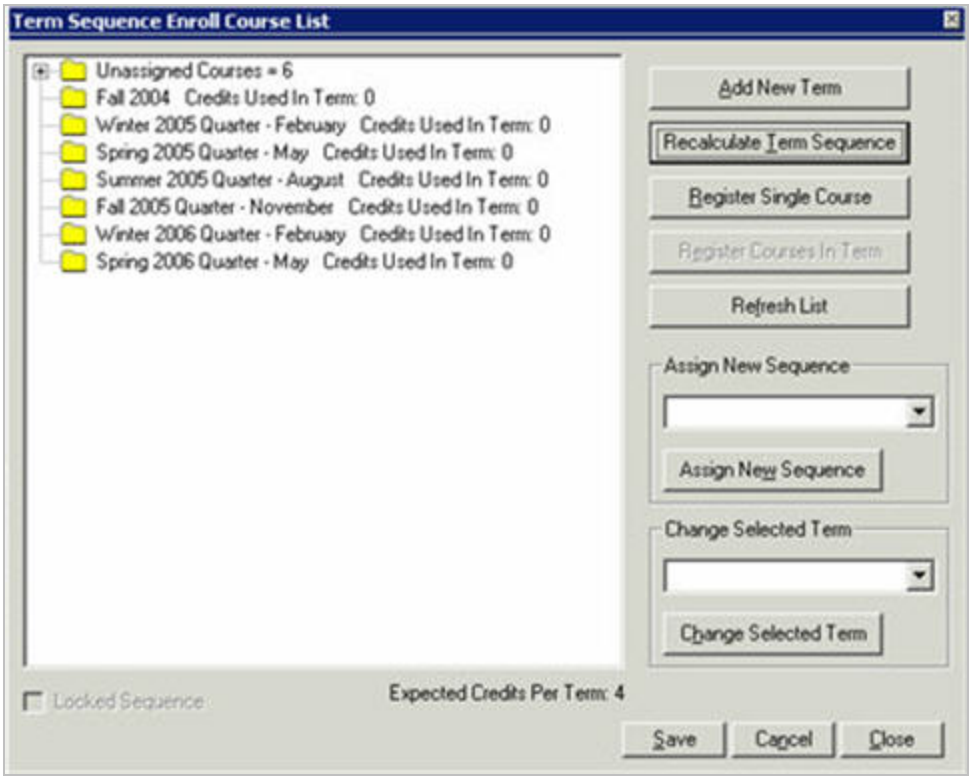
To view a student's term sequence:

1. Select your student and navigate to the student's schedule (**View** > **Academic Records** > **Schedule**). The student's schedule is displayed.



2. Click **Term Sequence**. The Term Sequence specific to the student is displayed. The grid is populated with the courses that the student has taken in the term. Information on the number of credits associated with each course in a term is gathered from the student's schedule.

   Note: The Term Sequence button is disabled if the student is enrolled in a program version that has no term sequence.



Courses are sorted in the order they appear on the student's Term Sequence beginning with the next available courses at the top. Courses can be moved on the grid if the student has not registered for them.

- **Add New Term** - Adds a term to the end of the current displayed sequence.
- **Recalculate Term Sequence** - Determines the total credits needed, credit completed, and adds terms to the sequence that are needed to complete the total credits.
- **Register Single Courses** - Initiates registration for a selected course; and class section can be chosen according to the offering for the Term Sequence.
    - If term relationships are not configured, the term drop-down list in the registration form default to the term highlighted.
    - If term relationships are configured, the parent term in the registration form defaults to the term highlighted. You can then select a child term. The Child Term list is filtered based on the parent term.
- **Register Courses in a Term** - Initiate registration for each course associated with the selected term and allows selection of the class section offered for the term sequence. This button is disabled if term relationships are configured.

  Notes:
    - If prerequisites or corequisites are required for the course being registered and they are not met, a failure message appears. Users who have override permission can override the prerequisite/corequisite rules.
    - If student registration lock configuration is enabled, while registering a student through term

sequencing using the Register Single Course button, upon clicking **Finish**, the Registration Locks are evaluated.

- **Refresh list** - Refreshes the list and shows all status changes that have occurred for each sequence
- **Assign New Sequence** - Assign a new term sequence to a selected sequence.
    - If a course has been completed or scheduled, it stays with its previously defined sequence.
    - If a course is not in the new sequence and it is in Future status, the course is reassigned to the unassigned list.
    - If a course is in the new sequence, but contained in the old sequence, it is reassigned to the appropriate term in the new sequence.
    - New courses defined in the new assigned sequence are assigned to the proper term, and if in unassigned state, are moved to the newly assigned sequence's proper sequential term.
- **Change Selected Term**

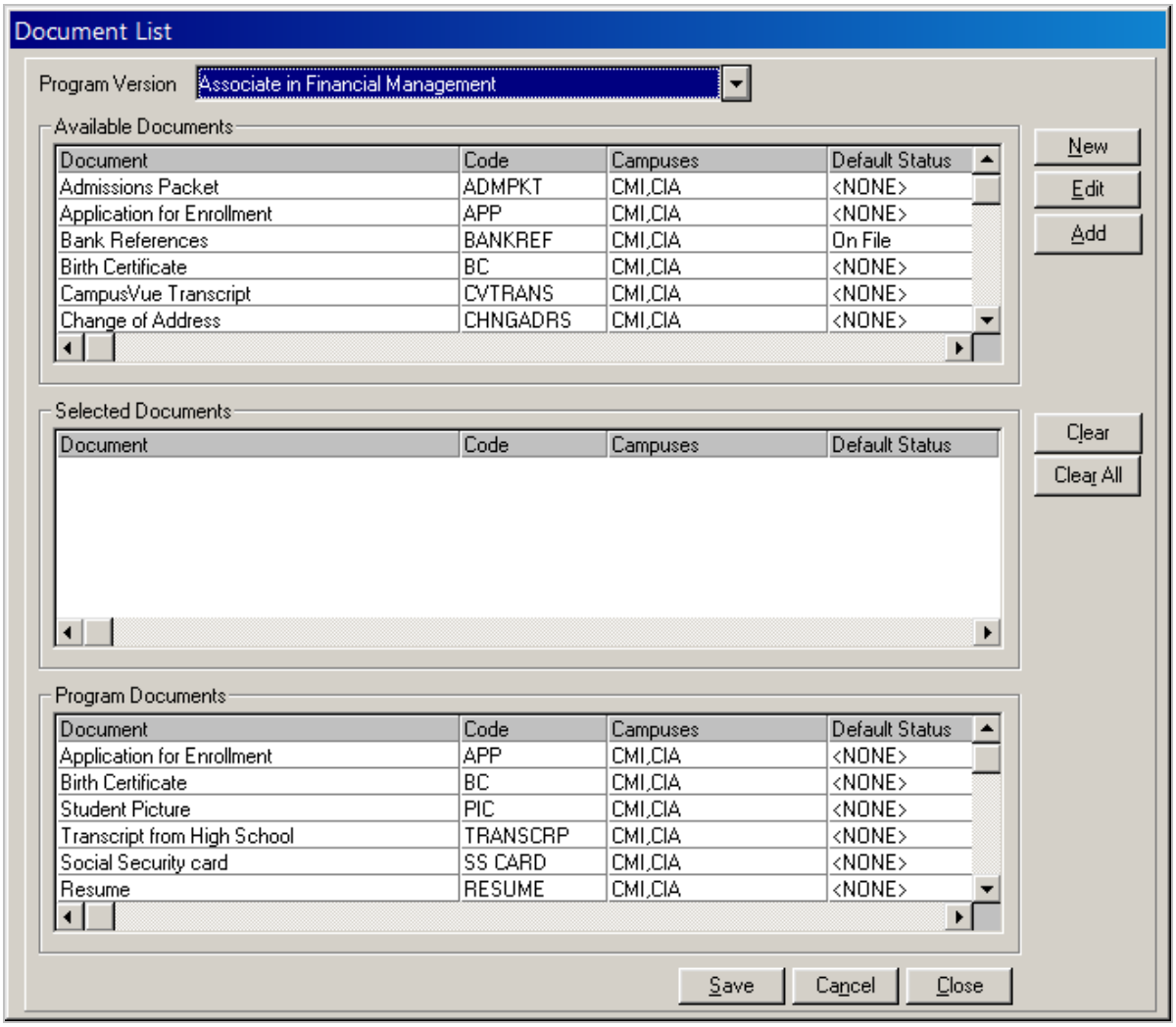
Program Version > Documents

Use the Document List form to assign one or more student documents as required for enrollment in a given program version.

Note: Documents available for selection must be configured before being displayed on the Document List form. Users with appropriate permissions (Lists > Contact Manager > Documents) can add documents and edit documents directly from the Document List form (including Campuses and Default Status). For more information, see Setup - Contact Manager Lists [Documents].

To add a document list to a program version:

1. On the Program Version form, click the **Documents** button. The Document List form is displayed.



2. From the **Program Version** list, select a program version that is part of the program.
3. Select a document in the **Available Documents** list and click **Add** to move the document to the Selected Documents field. Once documents are selected for the program version, the documents are tracked for a student who is enrolled in the program version and belongs to one of the campuses for which the document is set up (Campuses column).
4. Select a document in the **Selected Documents** list and click **Clear** to move a document back to the Available

Documents list. Click **Clear All** to remove all documents from the Selected Documents field.

5. Documents that were defined on the program level (Lists > Academic Records > Programs > Documents) are displayed in the **Program Documents** list. Compare the documents assigned to the program with the assignments for the program version to make sure there is no duplication.
6. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Program Version > Method Selection

Method selections for program versions are related to Student Accounts and Financial Aid. You can select billing methods, earning methods, and budgets directly from the Program Version form. Permissions to display, create, and update Academic Records, Financial Aid, and Student Accounts are required to use this feature.

The Student Accounts button on the Program Version form provides the following options:

- Lists > Billing Methods
- Lists > Earning Methods
- Associate Billing/Earning Methods

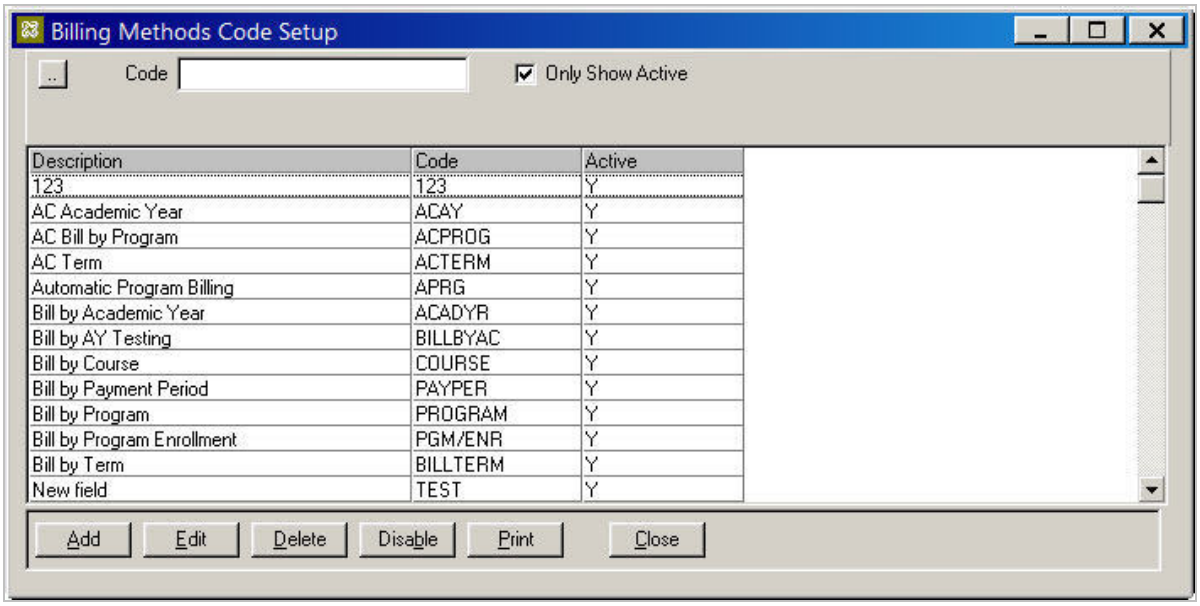
The Financial Aid button on the Program Version form provides the following options:

- Lists > Budgets
- Associate Budgets

Method Selection for Student Accounts

To set up a billing method for a program version:

1. On the Program Version form, click **Student Accounts**, and select **Lists > Billing Methods**. The Billing Methods Code Setup form is displayed.

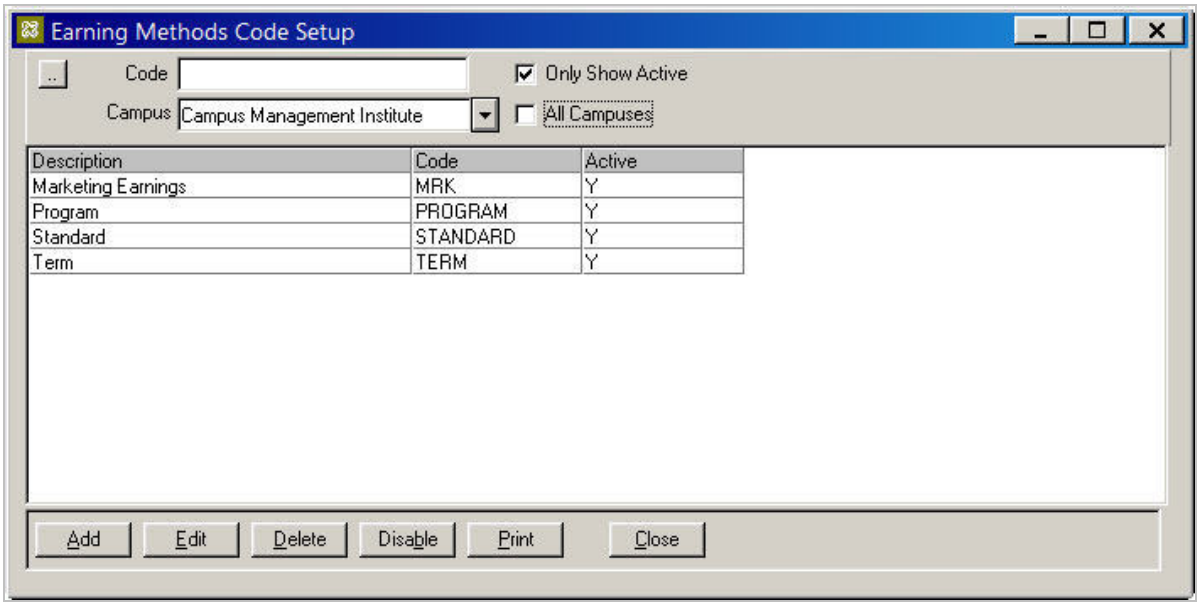


2. **Add**, **Edit**, **Delete**, **Disable**, or **Print** the billing methods for the program version from this form.

For more information, see Setup - Student Account Lists [Billing Methods].

To set up an earning method for a program version:

1. On the Program Version form, click **Student Accounts**, and select **Lists > Earning Methods**. The Earning Methods Code Setup form is displayed.

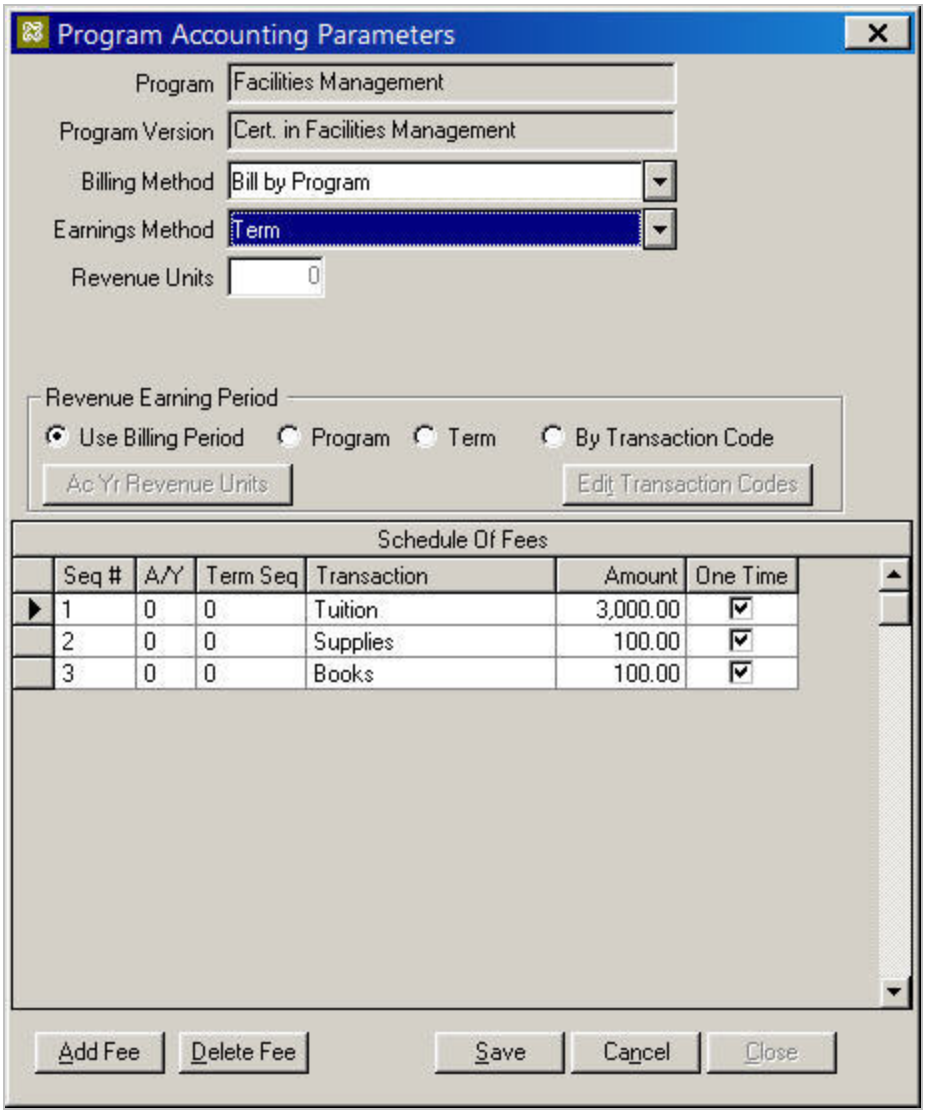


2. **Add**, **Edit**, **Delete**, **Disable**, or **Print** the earning methods for the program version from this form.

For more information, see Setup - Student Account Lists [Earnings Methods].

To associate billing/earning methods for a program version:

1. On the Program Version form, click **Student Accounts**, and select **Associate Billing/Earning Methods**. The Program Accounting Parameters form is displayed.



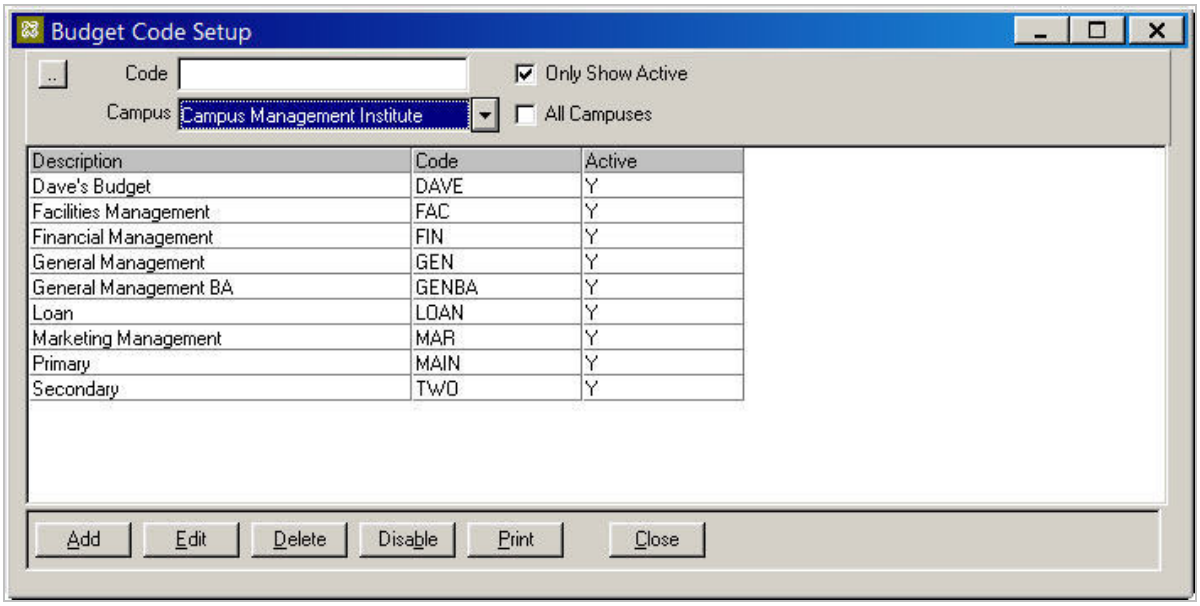
2. Select the Billing Method and Earnings Method, specify Revenue Unit and Revenue Earning Periods, and add or delete fees.

For more information, see Setup - Student Account Lists [Programs].

Method Selection for Financial Aid

To set up a budget for a program version:

1. On the Program Version form, click **Financial Aid**, and select **Lists > Budgets**. The Budget Code Setup form is displayed.

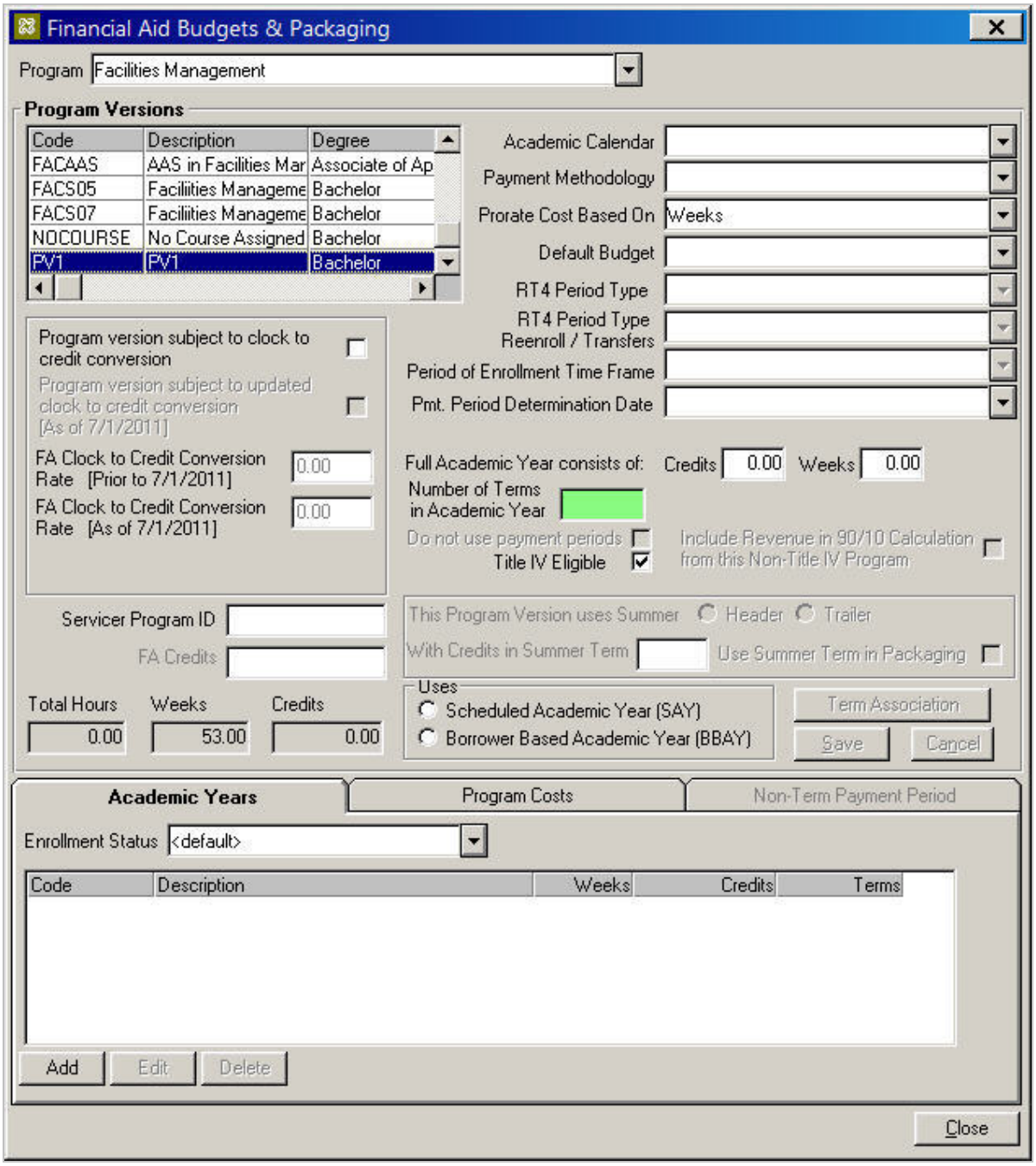


2. **Add**, **Edit**, **Delete**, **Disable**, or **Print** the budgets for the program version from this form.

For more information, see Financial Aid Lists [Budget].

To associate budgets for a program version:

1. On the Program Version form, click **Financial Aid**, and select **Lists > Associate Budgets**. The Financial Aid Budgets & Packaging form is displayed.



2. **Add**, **Edit**, **Delete**, **Disable**, or **Print** the budgets from this form.

For more information, see Programs in Financial Aid Lists.

Programs > Documents

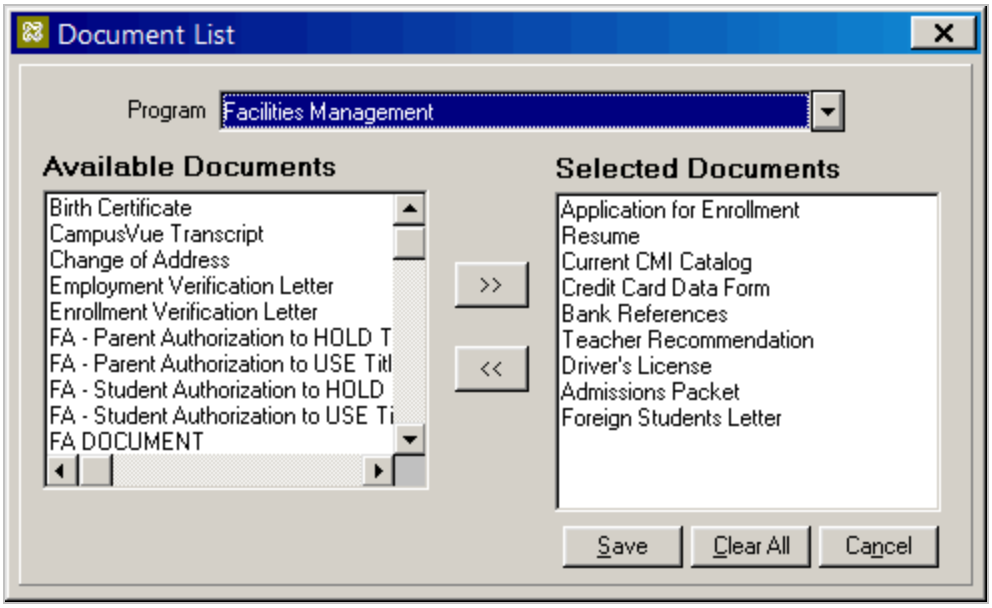
You can select one or more student documents to be required for enrollment in a given program. Documents such as letters of recommendation, driver's license, birth certificate, etc., can be selected.

The selected documents are tracked for any lead or student for whom the program is selected. If the program is selected for a new lead, the program-related documents are listed for tracking in the lead/student's document file. Enrollment in the program is not a requirement.

Prerequisite: Documents must be set up in CampusNexus Student before they can be selected for a program. For more information, see the Documents topic in Contact Manager Lists.

To add a document list to a program:

1. On the Programs Code Setup form, click the **Documents** button. The Document List form is displayed.



2. Select a document from the list of **Available Documents** and click >> move it to the Selected Documents field.
3. Select additional documents as required.
4. To remove a document from the Selected Documents field, select the document and click <<.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Programs > Tests | Pre-Enrollment

The test list for programs is used to specify entrance tests that are required of students who wish to enroll in a program. Previous education can be used to qualify which tests and scores are required. You can select one or more tests from the list of tests and specify a required minimum score for each test.

The selected tests are tracked for any lead or student for whom the program is selected. If the program is selected for a new lead, the program-related tests are listed in the lead/student's test file. Enrollment in the program is not a requirement for the tests to be listed in the lead/student file.

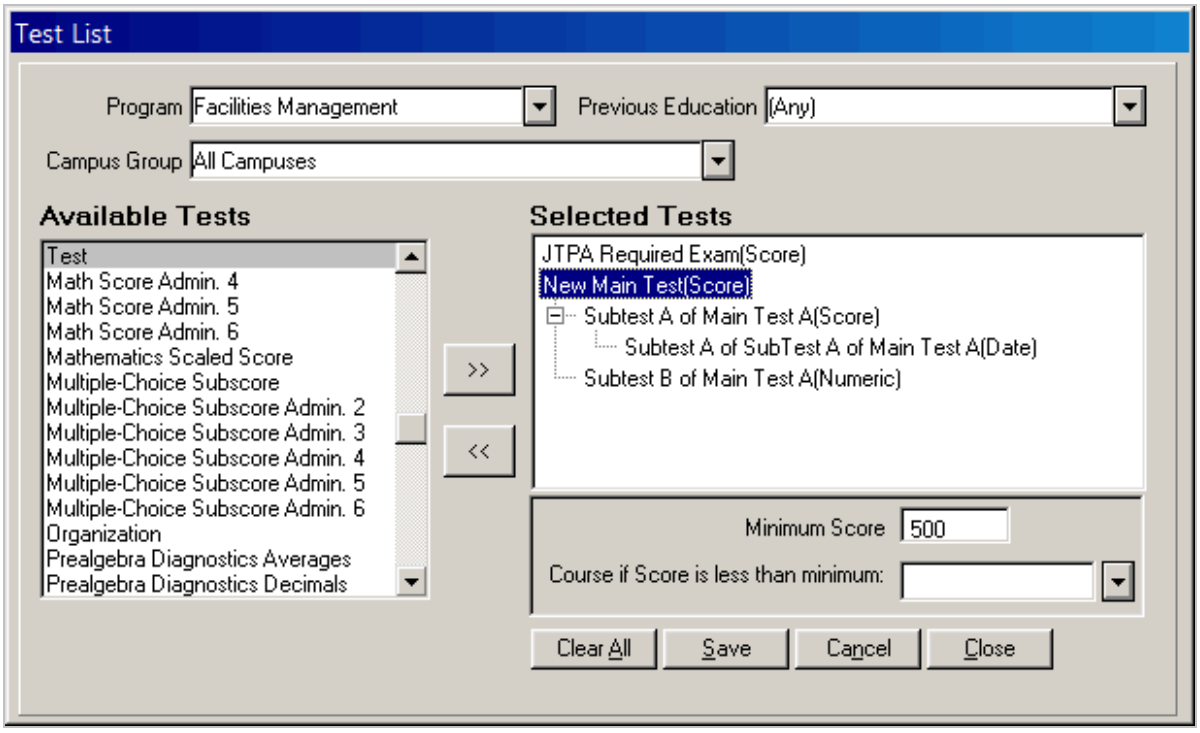
The "Selected Tests" list contains the hierarchical order of the tests, which includes the sub-fields. The field name is followed by its field type such as Score, Text, Date, or Numeric. When selecting a test, all sub-fields are also available for selection so that CampusNexus Student can compare the imported student's test score with the program's or program version's entrance test requirements. Only sub-fields that are of 'Score' type can be assigned a minimum score and remedial course requirement. Other types of sub-field appear disabled. The 'Available Tests' list contains only Main Tests.

Prerequisite: The list of available tests must created. See Test Setup.

To add or edit an entrance test list for a program:

1. On the Programs Code Setup form, click the **Tests | Pre-Enrollment** button. The Test List form is displayed.

   The Program field (read-only) displays the program selected on the Programs Code Setup form.



2. Select a **Campus Group**.
3. Select a **Previous Education** option.
4. Select a test from the list of **Available Tests** and click >> to move it to the Selected Tests field.
5. Specify a numeric value for the acceptable **Minimum Score** for the test.

Note: The Type of the test selected must be 'Score', otherwise the Minimum Score field is disabled.

6. In the **Course if Score is less than minimum** field, select a course to be assigned to any student who fails to reach the minimum score on the selected test or sub-field. The course will be added if the course is not already included in the student's course schedule when the student's score is below the minimum value.

   Note: The Type of the test selected must be 'Score', otherwise the Minimum Score field is disabled.

7. Select additional test as needed and specify corresponding test score requirements.

8. To remove a test from the list, select it in the **Selected Tests** field, and click to move it back to Available Tests field.

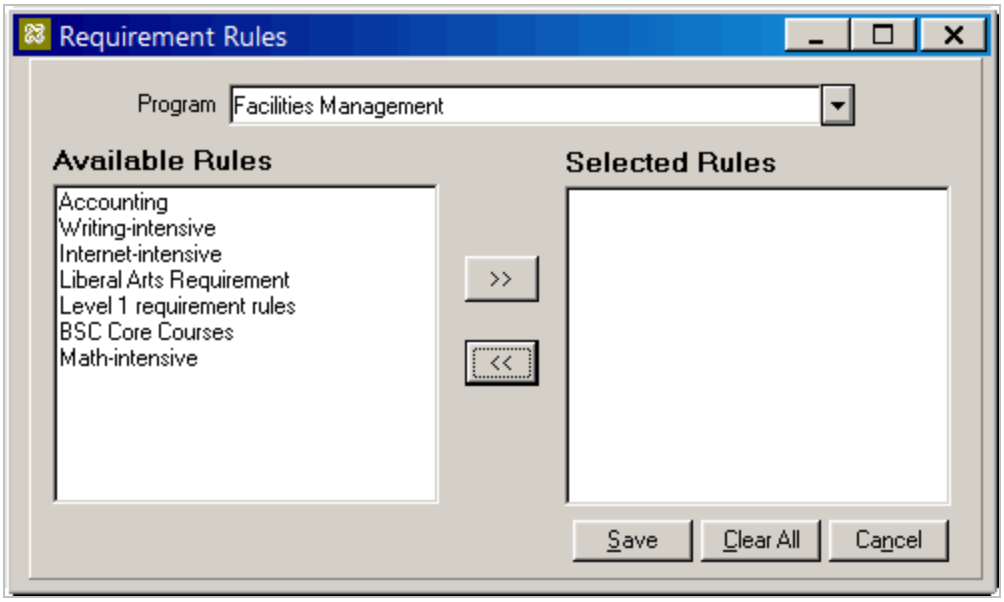
9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Programs > Requirement Rules

You can assign requirement rules at the program level. All enrollments into the program's subsequent program versions must satisfy the conditions of the program's requirement rules.

To assign requirement rules to a program:

1. On the Programs Code Setup form, click the **Requirement Rules** button. The Requirement Rules form is displayed.



2. Select a rule from the list of **Available Rules** and click >> move it to the Selected Rules field.
3. Select additional rules as required.
4. To remove a rule from the Selected Rules field, select the rule and click <<.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

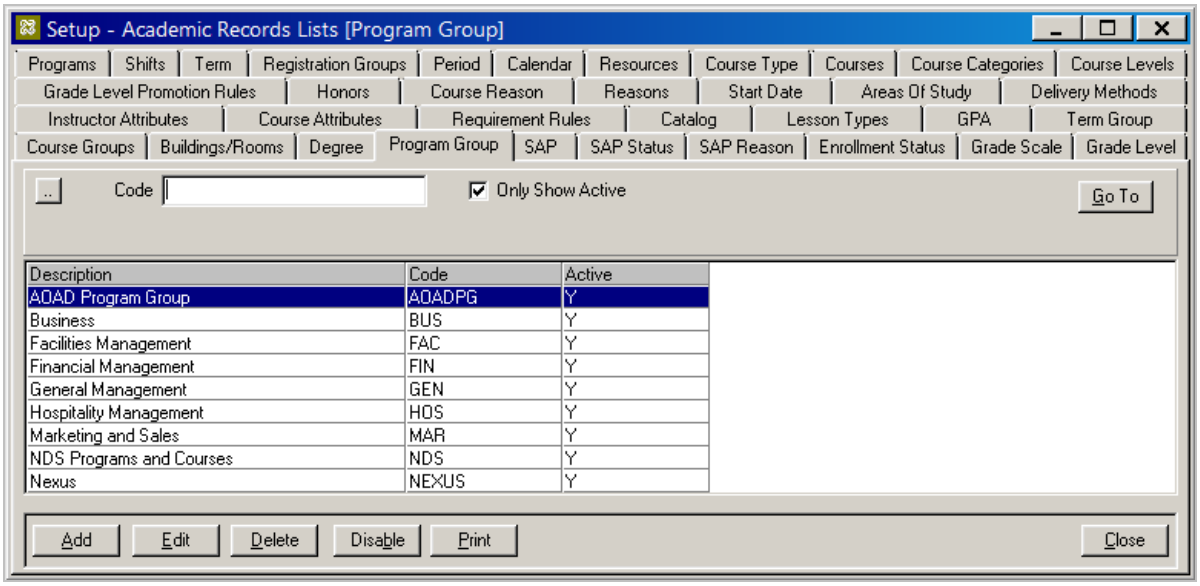
Setup - Academic Records Lists [Program Group]

Program groups classify program versions that have some common characteristic. A program group also serves to identify the interest of a lead for the Admissions department before the lead selects a program version. When you define a program version, you must specify a program group to which the version is related.

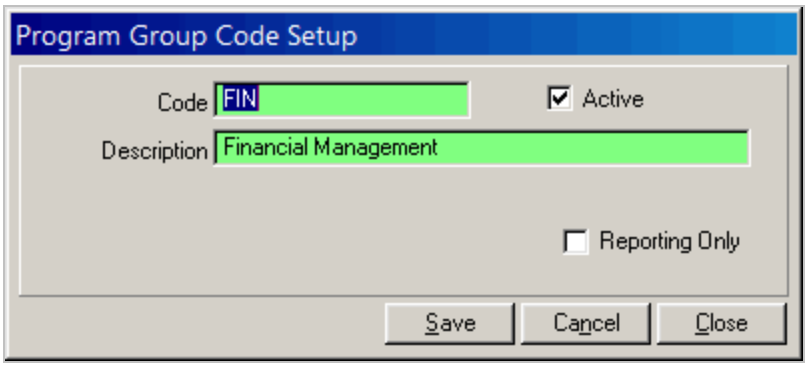
Note: A program group code cannot be deleted if it is assigned to a program version.

To add or edit a list of program group codes:

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Program Group**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Program Group Code Setup form is displayed.



6. Specify a unique **Code**.

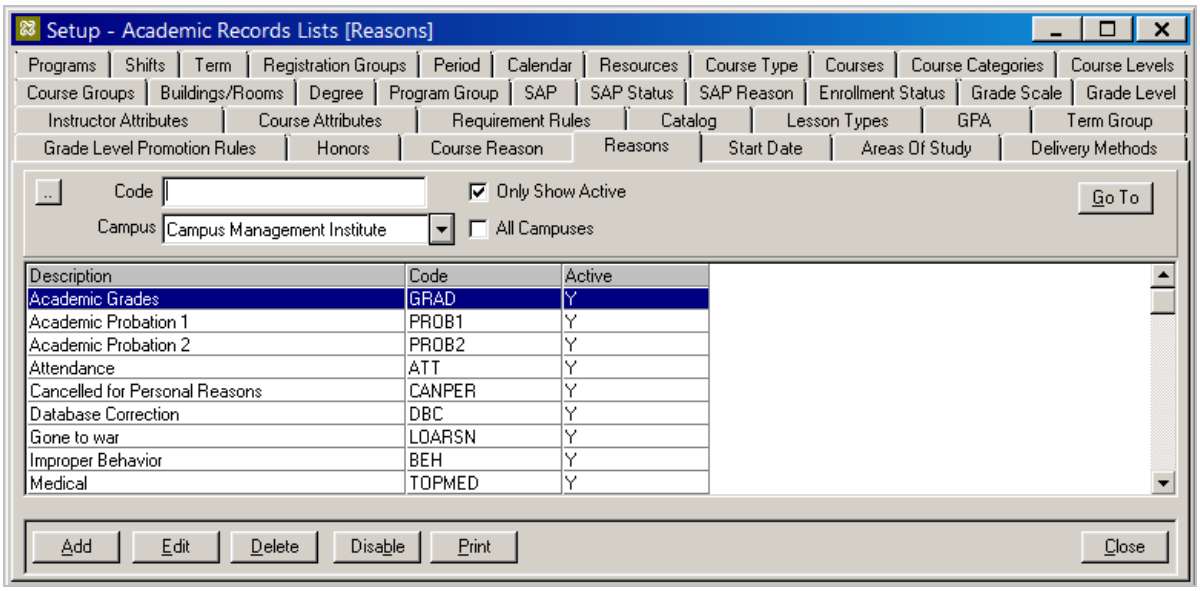
7. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
8. Enter a **Description**.
9. Select **Reporting Only** if the program group code is used for reporting purposes only.
10. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Academic Records Lists [Reasons]

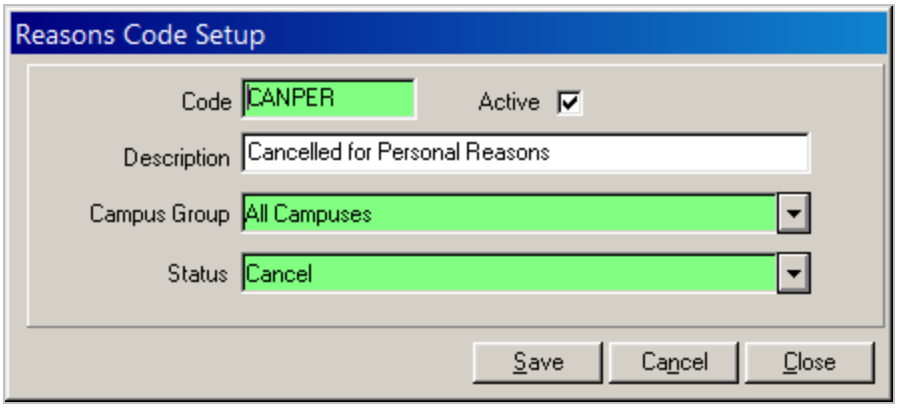
Reason codes can be assigned to student status changes. By relating a predefined reason code to a student status change, you can classify the changes into groups and analyze them with a report. The reason codes are related to specific status codes and campuses. A reason code can be included when making an individual or batch status change.

To add or edit a list of status change reason codes:

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Reasons**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Reasons Code Setup Form is displayed.



7. Specify a unique **Code**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Enter a **Description**.
10. Select a **Campus Group** to which the reason is related.
11. Select a **Status** (student/school) to which the reason is related.
12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Academic Records Lists [Requirement Rules]

Institutions can assign rules to course categories and to program versions that require students to complete a certain number of credits of a specific course level to meet degree requirements.

For instance, a student may need to complete 12 credits of the general studies category from courses that are defined as undergraduate or graduate level courses. This rule applies to a number of credits associated with a course category defined on the degree audit. Institutions can assign the same rule to a program, so that in addition to the 12 required undergraduate course requirements to meet the category conditions, the program requires 32 credits in undergraduate course work (in any category) to meet the degree requirements.

Attributes assigned to courses at the course level can be assigned to rules. When a course is assigned to a program version's course list, the course's attributes defined at the course level are copied to the program version course level. These attributes can then be edited on the program version course list level.

Requirement rules can also be created to dictate more granular conditions for satisfying a degree audit. Rules can be defined using the following criteria:

- Number of credits, hours, or courses.
- Number of credits, hours, or courses that are required from courses of a certain course level.
- Number of credits, hours, or courses that are required from courses having specific attributes.
- More than one course level can be used as criteria in a rule

Users can add individual required credit or hour values, or course quantities to each course level in a rule, or a total credit, hour value, or course quantity that a course from any specified course level can fulfill.

Example

- An institution uses multiple designations for undergraduate courses, such as '100 level' and '200 level'. The user can add those levels to a rule and assign a single credit value that courses from either level can satisfy.
- The same institution requires that within a course category, 10 credits must be from '100 level' courses and 10 credits must be from '200 level' courses. The user can add both course levels to the rule and assign 10 credits to each level.

More than one attribute can be used as criteria in a rule. A required credit or hour value or course quantity can be added to the attribute. For example, an institution may require 36 credits in the Core class category, 10 of which must be met by writing-intensive courses. The rule includes 'writing-intensive' as one of its attribute criteria, and assigns 10 credits to the attribute. For the student to satisfy the degree audit, courses belonging to the Core course category and having a property of 'writing-intensive' must account for at least 10 of the student's credits.

Rules can be set at the program level. Program level rules allow users to set the overall requirements for the number of credits/courses that must be satisfied by courses at a certain course level or with a certain attribute for a student to satisfy a program version's degree audit.

Rules can be set at the program version level on one or more course categories. When a single rule is set on multiple course categories, the student can select courses from multiple course categories to fulfill the rule.

Program version level rules that associate with a single course category require that courses eligible to satisfy the rule must come from within that category. If a program version's course category has a rule assigned to it, the degree audit must know that only courses in that category can satisfy it (given they meet the criteria of the rule).

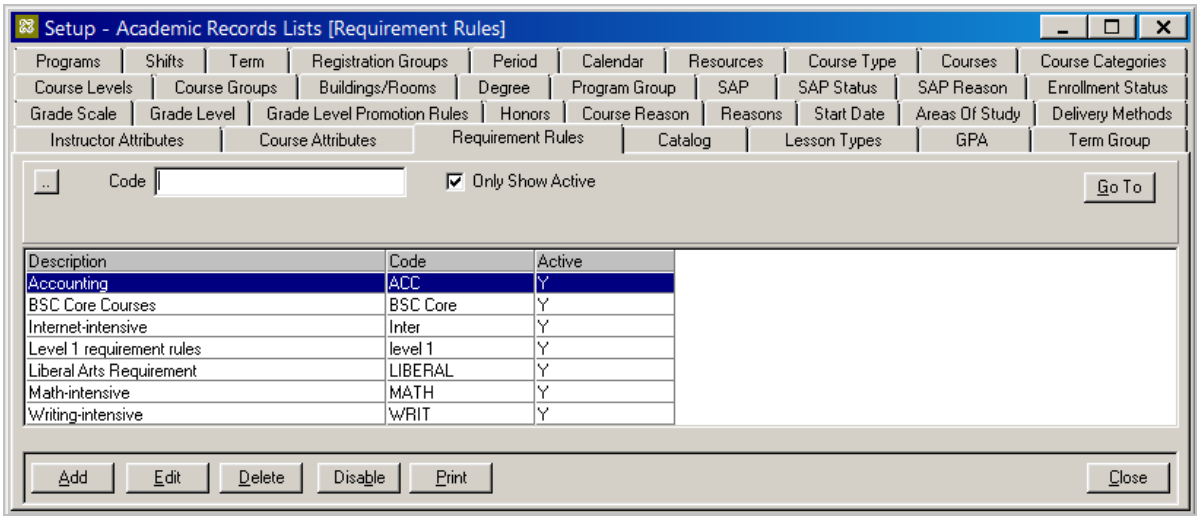
- If no rule is assigned to the course category, the degree audit behaves according to current functionality.
- If a rule is assigned across course categories (on a program or an area of study), the degree audit counts courses in any of those categories to determine satisfaction of the rule.

- If rules are assigned to a program and its program version course categories, the degree audit requires that conditions of all rules are met.

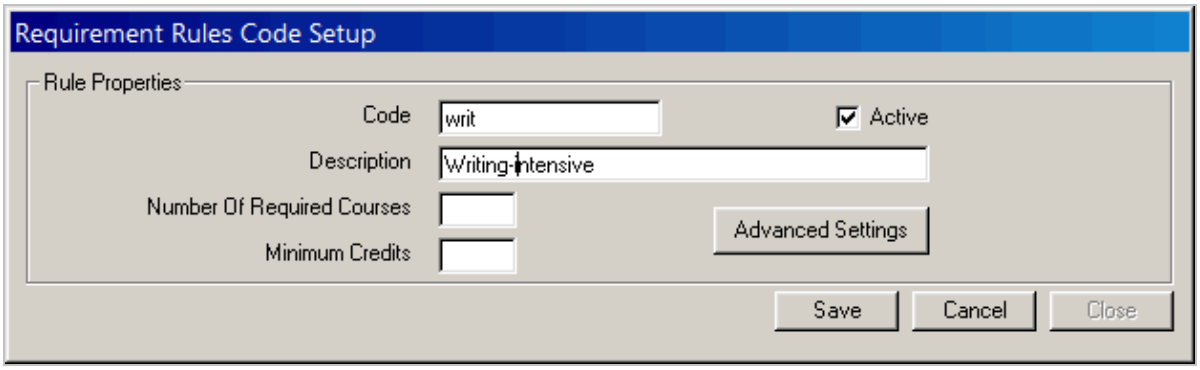
On the Degree Progress Audit section labeled 'Requirement Rules Summary', CampusNexus Student displays the rule name associated with the program, course category, and/or area of study and its criteria (course attributes with total credit or hours/-course values required, course levels with total credit or hours/course values), and how many courses/credits or hours have been taken to satisfy the conditions of the rule. The courses that were taken to satisfy the rule are also displayed. If more courses are taken than are needed to satisfy a rule, the summary displays only the required amount of courses taken (chronologically, starting with the first course taken).

To add a list of requirement rules codes:

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Requirement Rules**.



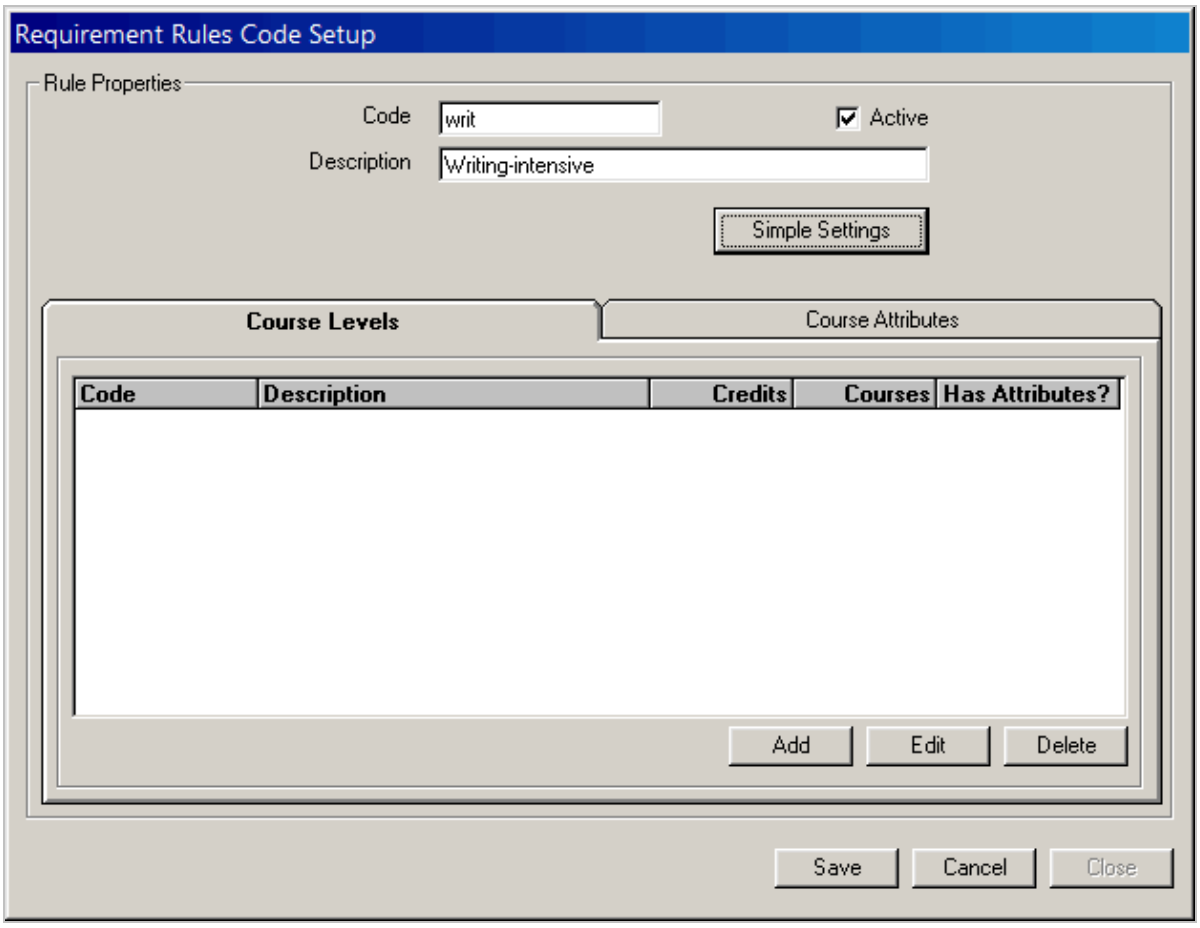
3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**. The Requirement Rules Code Setup form is displayed.



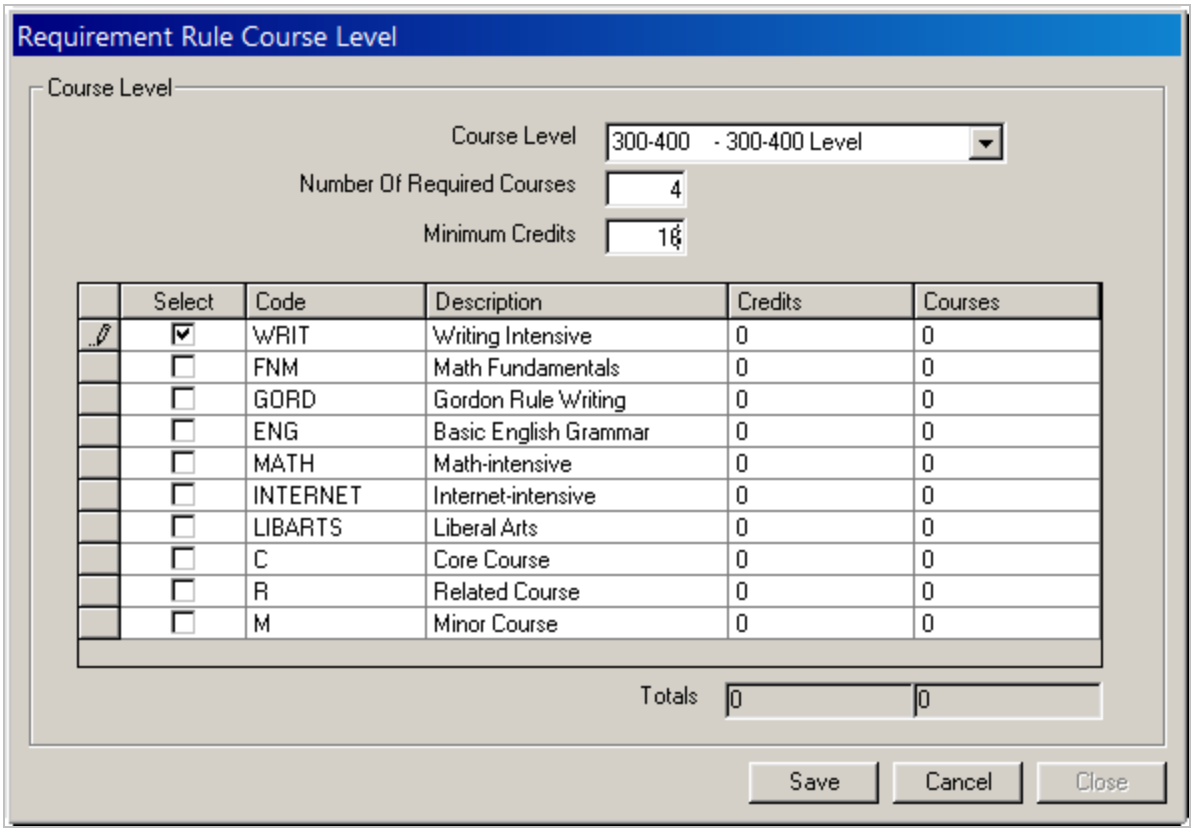
6. Specify a unique **Code**.
7. Enter a **Description**.

8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Specify the **Number of Required Courses** or credits for the rule. If you add a value to this field, you cannot add credit or course values to individual course categories or attributes, and you can skip to the last step.

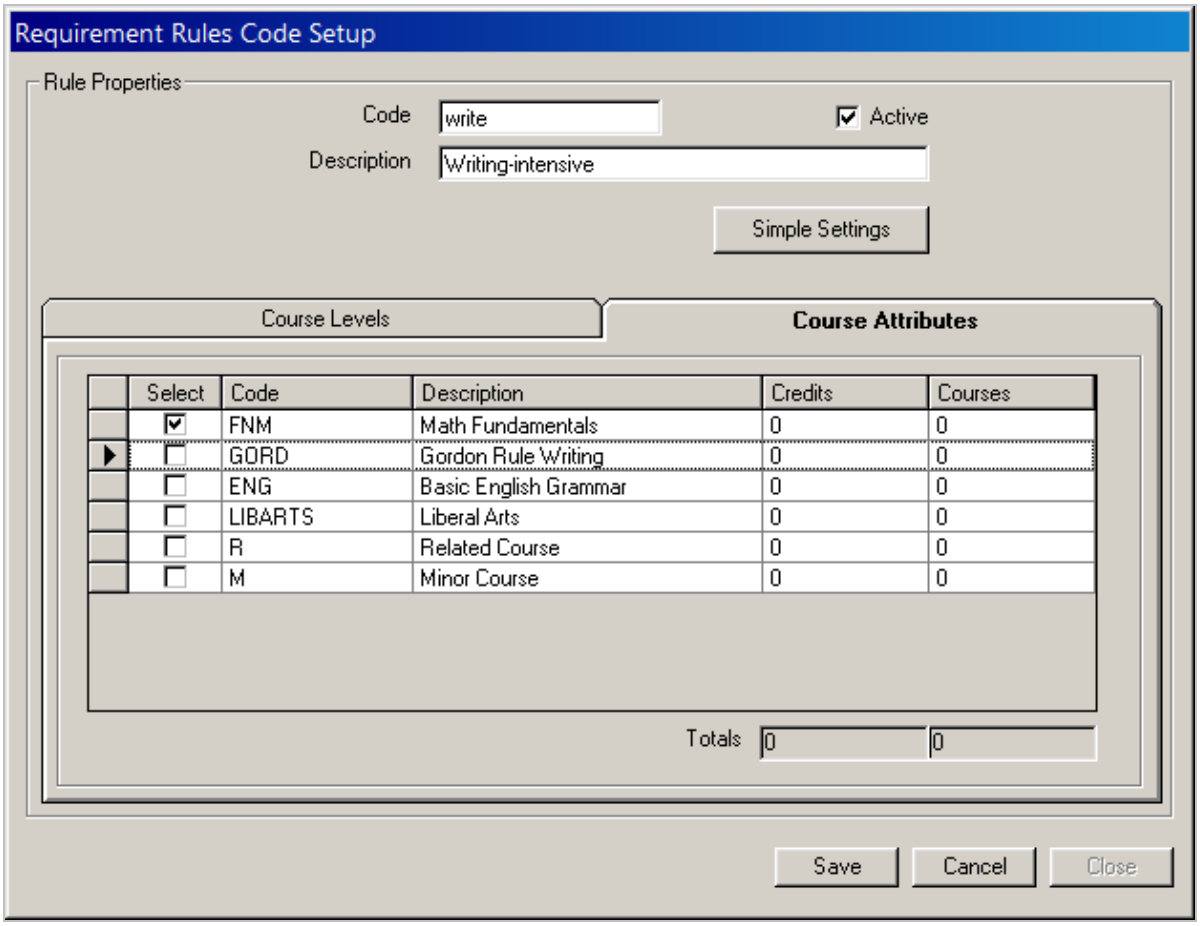
   If you do not specify the number of required courses or credits for the rule, click the **Advanced Settings** button and continue with the next step.



10. :Click **Save**.
11. Click **Add** on the Course Levels tab and assign a count of credits or courses required from each course level to satisfy the rule.



12. Click the **Course Attributes** tab to assign a count of credits or courses required from courses having each attribute to satisfy the rule.



13. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

After the rule is saved, the rule is applied, and the criteria set in the steps above will be factored in when CampusNexus Student determines completion of a student's enrollment.

Satisfactory Academic Progress (SAP)

Accreditation bodies require institutions to calculate each student's academic progress based on a defined measure of time, typically every grading period, such as a term. Students must maintain satisfactory academic progress to continue as students and to remain eligible for financial assistance. SAP is determined by measuring the student's cumulative grade point average (CGPA) and the student's rate of progress toward completion of his or her academic program.

SAP can be automatically calculated by CampusNexus Student. This calculation is based on one or more tables of parameters against which student progress is measured. It is possible to have a different SAP table for each program (see Grade Scale). Enrollment status is also taken into account. You can have different criteria (in the same table) for students who are full time, 3/4 time, half time, etc.

Before the SAP tables (SAP Codes) can be set up, you need to define school status codes for a recommended suspension and probation. CampusNexus Student can change the status of a student who fails to meet the SAP criteria (SAP Details). If you do not want the student status to be changed, you can cause a note to be listed with the student recommending manual action to be taken.

You also need to define student groups for recommended suspension and probation. Students who fail to meet the SAP criteria are assigned to the groups you select. From these groups, the appropriate reports can be generated.

Example: The total allowable credits (maximum program length) (150 % of 120) of a program is 180. The midpoint of the maximum program length (50% of 180) is 90. The three-quarter point of the maximum program length (75% of 180) is 135. Total credits required are 120. We'll use a table to help us set up our SAP table for the program.

SAP Example

Total Number of Credits Attempted	Probation If CGPA is Below	Recommend Suspension If CGPA is Below	Recommend Suspension If Percent of Credits Completed to Credits Attempted is Below
1 - 16	1.50	1.00	50%
17 - 32	1.50	1.20	60%
33 - 64	1.65	1.30	65%
65 - 90	1.80	1.50	67%
91 - 135	2.00	1.75	67%
136 - 180	2.00	2.00	67%

Each line in the table results in two conditions in our new table. The conditions should start with the lowest number of credits attempted and the lowest CGPA first.

For the first line we create a condition (01) for 1 - 16 credits attempted, a CGPA of less than 1.00, and a completion ratio of 50% of credits attempted. If this condition is met by the student's record, we will change the school status to *Recommend Suspension* and suspension will be recommended in the manual action note. (The status labeled *Recommend Suspension* is still an active status because we don't want to automatically set the student's status to a temporary or permanent out category without a staff member review.)

The condition (02) is for 1 - 16 credits attempted and a CGPA of less than 1.50. If the student's record exceeds condition 01 but fails condition 02, CampusNexus Student changes the student's status to *Probation* (also an active status) with a time limit that we set for 120 days.

SAP Calculation

CampusNexus Student's Satisfactory Academic Progress (SAP) wizard automates the calculation of a students' academic progress. The SAP wizard calculates the student's academic progress based on tables that have been previously set up, the student's academic progress, and whether enrollments are linked. SAP can be calculated at any time. SAP calculations can be performed for a student group or an individual student.

The main part of any SAP calculation is based on cumulative calculations of SAP detail conditions. For example, if SAP is calculated for a term that occurred two terms ago, the cumulative calculations (Credits Attempted/Credits Earned, cumulative GPA, etc.) are calculated as of the selected term's end date, not as of the system date.

The SAP calculations are date sensitive when the calculation is processed for a historical term. The pertinent data fields used in the calculation are calculated as of the end date of the term being evaluated. For instance, when SAP is calculated for a prior term, the user is given the option to recalculate SAP for all subsequent terms, since a change in SAP status in the term for which the grade was edited may cause a change in the SAP statuses for subsequent terms.

SAP calculation supports processing of historical terms on an individual student basis only. Users are guided through SAP calculations for all subsequent terms with completed classes as part of the process of calculating SAP for a historical term. The calculation processes the historical term up to the most recently completed term. Each term included in the SAP processing is evaluated and the resulting SAP statuses posted for each term.

When a SAP evaluation is done and a student's school status is moved to *Drop* as a result, the *Date of Determination* and *NSLDS Withdrawal Date* fields are automatically populated with the date the SAP evaluation was performed.

The SAP wizard allows automated school status changes to take place *only* when SAP is being calculated for the most recently completed term.

Each student's GPA and Credits Attempted/Credits Earned are calculated as of the end date of the term the SAP calculation is being processed for. CampusNexus Student updates the records of the affected students with the results of the latest calculation. Depending on the setup in the SAP tables, some students' statuses may be changed to Probation or Recommend Suspension. The indicator in a student's record is simply a Yes (making SAP) or No (not making SAP). The SAP indicator for a selected student can be seen in the Date-Status tab of the student's Enrollment folder.

Changes to the student's SAP calculation or status, along with all SAP failed reasons are recorded in the SAP audit records. The Student Master record contains any School Status changes, and the Progress tab of the student's Enrollment folder contains the SAP Status for each historical term.

Performing a term-based SAP evaluates all students who have hours attempted in that term, regardless of their status. If the term on which the SAP calculation is based is a parent term, all related child terms are included in the SAP calculation.

If a student has attempted more than the configured maximum time frame (MTF) of the required credit or clock hours for a program version, the student's SAP status and school status can be changed to a specified status and can also be added to a specified group. See also SAP Maximum Time to Complete.

A student who exceeds the configured maximum time frame of credit/clock hours criteria configured for the SAP Policy is evaluated, even if the student has already failed one criterion within the SAP Policy.

SAP can be automatically performed on a student when the student's school status changes to Drop. CampusNexus Student determines the student's LDA and calculates SAP for the corresponding term.

GPA Criteria and Letter Grades

Developmental courses are normally taken in a student's first term because the student is not usually eligible to enroll in regular undergraduate courses until the student has successfully completed all developmental courses. These courses are not normally a part of a student's GPA. They are graded with letter grades set up not to affect GPA. However, the letter grades used are set up to be included in the SAP calculation because some schools count the courses toward the student's rate of progress. These cases are handled as follows in CampusNexus Student:

- SAP does not evaluate any GPA criteria for students who receive letter grades that are not configured to be included in the GPA calculation, for all courses taken during the SAP evaluation period (Term or Cumulative).
- SAP evaluates all non-GPA related criteria for students who receive letter grades that are not configured to be included in the GPA calculation, for all courses taken during the SAP evaluation period (Term or Cumulative).
- When SAP is run by Term and the student Term GPA is 0.00 due to the courses not affecting GPA, SAP ignores the Term GPA criteria.

- When SAP is calculated, students who receive letter grades that are not configured to include GPA show a SAP Status of *SAP Met* if they passed all non-GPA related SAP requirements.

SAP Maximum Time to Complete

The maximum time frame (MTF) rule for SAP requires schools to dismiss students permanently when it becomes mathematically impossible to earn the remaining required credits within the remaining allowable attempted credits (maximum allowable attempted credits = X% of the program's required credits or hours). The SAP calculation identifies a student as exceeding MTF when the projected total attempted (actual attempted + remaining credits to earn) exceed the maximum credits allowed to complete. The SAP calculation also takes into consideration transferred credits to determine if the credits should be included when determining a student's MTF.

If a student fails the SAP calculation due to the MTF rule, the SAP failure reason states: *'Student cannot complete the required (credits or clock hours) (# of required credits or clock hours) within the maximum allowable time frame, due to remaining required (credits or clock hours) (# of remaining required credits or clock hours for student) exceeding the allowable attempts remaining (# of allowable attempts remaining).'* (The student's actual values replace the text in parentheses).

Example: Using 150% as the configured maximum time frame, a student started with 92.5 required credits, 77.5 remaining required credits, and 46.25 allowable attempts remaining. The student failed the SAP calculation due to the maximum time frame rule. In this case the message may state: *'Student cannot complete the required credits (92.5) within the maximum allowable time frame, due to remaining required credits (20) exceeding the allowable attempts remaining (14.25).'*

Note: During SAP processing, if the status of a student is changed to *Drop* as a result of the *Validate for maximum timeframe of X%* rule or failing a particular sequence within the SAP detail configuration, one or more courses from the enrollment may be dropped. For each course that is dropped, CampusNexus Student checks the add/drop date configuration to determine if the drop occurred before or after the add/drop date. If the **Add Drop Flag** is configured to **S - Course Section Enforced** for the course section's campus, the add/drop date at the course section level is used.

Configurable Option for MTF

CampusNexus Student provides a configurable option for setting the maximum time frame value used to evaluate a student's SAP. Selecting the *Validate for maximum timeframe of* % check box and typing a figure enables users to configure any value up to 255% for the MTF on the **SAP Setup** form. If users select anything over 150%, a message is displayed at Save, informing them that the Department of Education has published the value to be 1.5 times the program length for undergraduate programs. CampusNexus Student calculates the specified MTF percentage in the SAP calculation for all methods of running SAP (Term, Cumulative, Payment Period, Automated Term, and Automated Payment Period) using a new merge field for the criteria selected in the SAP table, including Credits, Hours by Attendance, and Clock Hours by Course.

Users can select clock hours or credit hours in the *Exceed Allowable Time Frame* reason for students who cannot complete required credits within the MTF. The merge field *Based on* then replaces with credit hours or clock hours as specified in the SAP Policy set up when used in the *Exceed Allowable Time Frame* reason. The SAP Code List report displays the MTF percentage and configuration fields. The MTF and the option to *Exclude Transfer Credits* can be enabled or disabled for the report.

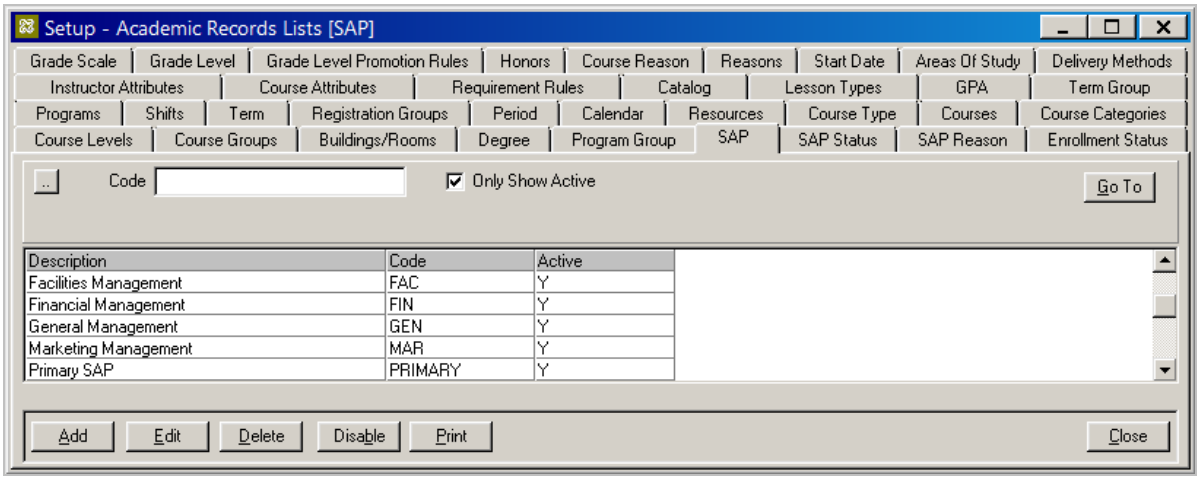
The new MTF % configured on the SAP policy is an available merge field for SAP reasons schools can use in messages sent to students when they fail to achieve SAP on this criterion. The message in the SAP reason can be customized according to the criteria used, so that students know what percentage they are being evaluated against (Credits, Hours by Attendance, or Clock Hours by Course).

Setup - Academic Records Lists [SAP]

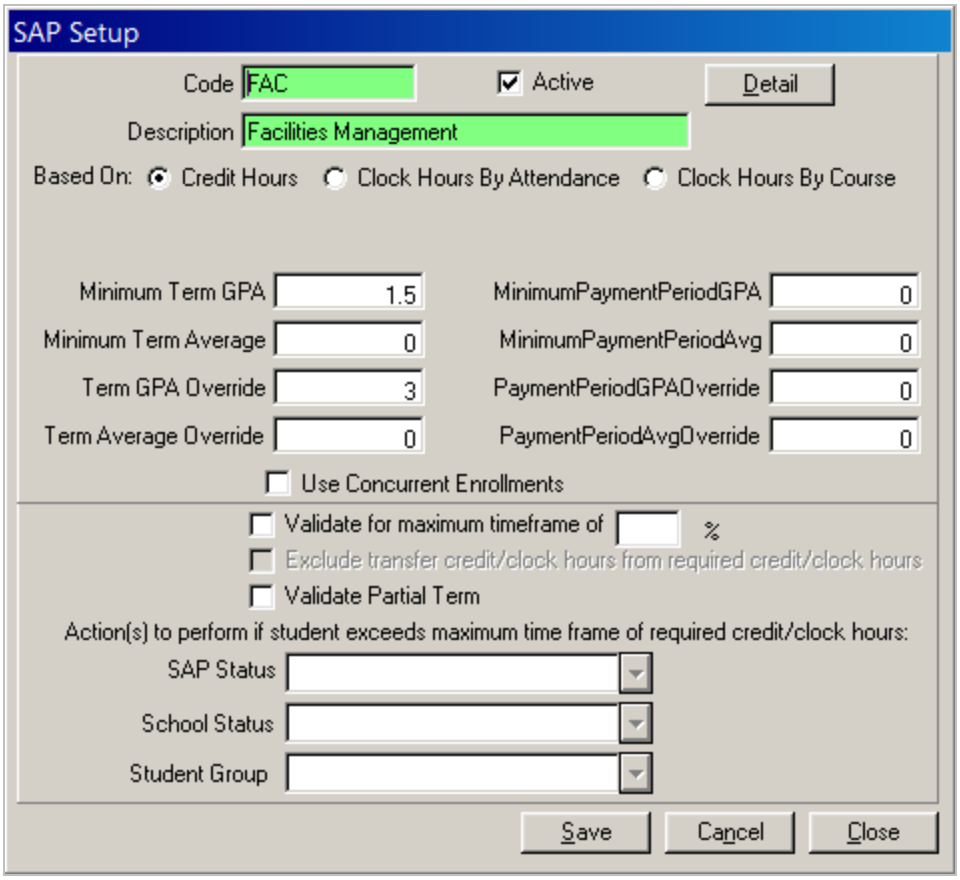
In CampusNexus Student, Satisfactory Academic Progress (SAP) tables are referred to as SAP codes. Use this procedure to add or edit a SAP code.

To add or edit a list of SAP codes:

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **SAP**.



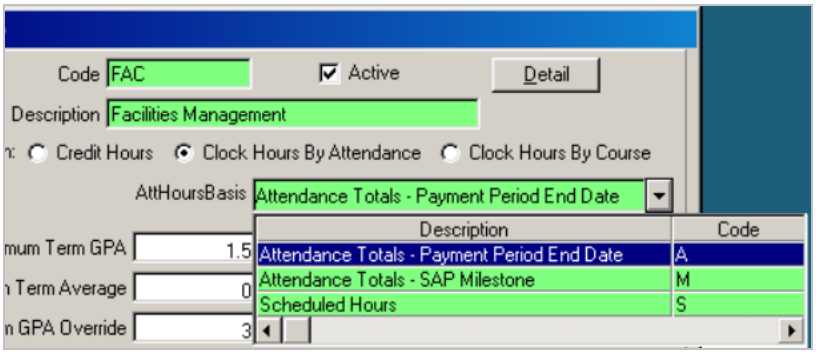
3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The SAP Setup form is displayed.



6. Specify a unique **Code**.
7. Select or clear the **Active** check box to designate the record as active or inactive, respectively.

   Note: The Detail button is used to set up the SAP criteria. For more information, see SAP Detail.
8. Enter a **Description**.
9. The SAP Calculation is based on the selection made from the **Based On** options. The option chosen here determines how the overall SAP evaluation works for a given student who is associated to this SAP policy. This selection is also important because it affects how your institution validates the 150% rule requirement for SAP.

   - If **Credit Hours** is selected, the SAP calculation is based on the total number of credit hours a student attempted versus earned in a program for the time period SAP is run for.
   - If **Clock Hours By Attendance** is selected, the **Attempted Hours Basis** (**AttHoursBasis**) field is displayed. The Attempted Hours Basis field provides the **Attendance Totals** options (two selections) and a **Scheduled Hours** option. **Attendance Totals** is the default when a new SAP code is added for institutions currently evaluating SAP based on Clock Hours by Attendance.



- **Attendance Totals - Payment Period End Date** uses the end of the payment period date to evaluate SAP and counts hours as the sum of the attended and absent totals from the student's attendance records. The system design includes hours for courses in progress and makes the assumption that the student is passing the course and hours can be applied. As no final grade is present, the course in progress does not apply within the GPA computation.
- **Attendance Totals - SAP Milestone** uses the end of the SAP milestone date to evaluate SAP and counts hours as the sum of the attended and absent totals from the student's attendance records.

  This configuration is used to allow schools more granular control of the attendance used in the SAP evaluation for each individual student. (e.g. A school is experiencing a snow day where one student is able to make it to school and gain attendance, however another student is unable to make it to school. The student that makes it to class would have their attendance used in the SAP evaluation.)
- **Scheduled Hours** uses the SAP milestone date for SAP evaluation and evaluates when the scheduled hours for the payment period have elapsed. (After selecting Scheduled Hours, the Minimum Term GPA, Minimum Term Average, Term GPA Override, and Term Average Override fields become disabled.)

- If **Clock Hours By Course** is selected, the SAP calculation is based on how many clock hours are attempted versus the number of clock hours earned by a student for completed courses. This is only when it is run by term or payment period.

Note regarding an evaluation using the SAP Milestone date: When SAP is run for a student in a clock hour program, the hours attended / earned and hours scheduled / attempted are calculated based solely on the defined hours required for that given payment period. (Note that the hours attended / earned are only gathered from courses with a posted grade.) This evaluation spans the first day of the payment period up until the exact hour on the SAP milestone date where the student is scheduled to meet the threshold for the hours of that payment period.

10. **Minimum Term GPA** - If a student satisfies the SAP table requirements, but receives a term GPA below the value in this field, the student is not making SAP. Leave this value at zero (0) if it is not applicable.

    This field is disabled if Scheduled hours is selected for the Attempted Hours basis when the SAP Policy is Based on Clock Hours by Attendance.

11. **Minimum Term (Numeric) Average**- If a student satisfies the SAP table requirements, but receives a term numeric average below the value in this field, the student is not making SAP. Leave this value at zero (0) if it is not applicable.

    This field is disabled if Scheduled hours is selected for the Attempted Hours basis when the SAP Policy is Based on Clock Hours by Attendance.

12. **Term GPA Override** - If a student does not satisfy the SAP table requirements, but receives a term GPA that

meets or exceeds the value in this field, the student is making SAP. Leave this value at zero (0) if it is not applicable.

This field is disabled if Scheduled hours is selected for the Attempted Hours basis when the SAP Policy is Based on Clock Hours by Attendance.

13. **Term (Numeric) Average Override**- If a student does not satisfy the SAP table requirements, but receives a term numeric average that meets or exceeds the value in this field, the student is making SAP. Leave this value at zero (0) if it is not applicable.

    This field is disabled if Scheduled hours is selected for the Attempted Hours basis when the SAP Policy is Based on Clock Hours by Attendance.

14. **Minimum Payment Period GPA** - If a student satisfies the SAP table requirements, but receives a payment period GPA that falls below the value in this field, the student is not making SAP. Leave this value at zero (0) if it is not applicable.

15. **Minimum Payment Period Average** - If a student satisfies the SAP table requirements, but receives a payment period numeric average below the value in this field, the student is not making SAP. Leave this value at zero (0) if it is not applicable.

16. **Payment Period GPA Override** - If a student does not satisfy the SAP table requirements, but receives a payment period GPA that meets or exceeds the value in this field, the student is making SAP. Leave this value at zero (0) if it is not applicable.

17. **Payment Period (Numeric) Average Override** - If a student does not satisfy the SAP table requirements, but receives a payment period numeric average that meets or exceeds the value in this field, the student is making SAP. Leave this value at zero (0) if it is not applicable.

18. Select **Use Concurrent Enrollments** to indicate the SAP calculation combines the results of all concurrent enrollments when determining the SAP. The term and payment period fields become disabled when this option is selected.

19. Select **Validate for maximum time frame** to check if students have exceeded the maximum time frame (MTF) of required credit hours or clock hours. Students who can no longer complete their program within the required X% time frame are identified on the SAP calculation grid. This is evaluated using credit or clock hours.

    An additional business rule that is included in the X% validation is the SAP Maximum Time to Complete. If students exceed the limit, the fields under **Actions(s) to perform if student exceeds maximum time frame of required credit/clock hours** must be completed. The % field can be configured to contain a value up to 255, but if a value over 150% is entered, the user receives a message.

    Note: SAP should be evaluated for Maximum Time Frame as established on the front form of the SAP Policy regardless of the detail line that the individual student would fall under at each evaluation point, or even if the student does not meet a specific detail line.

    If the student fails MTF and not on a specific detail line, the audit, the Daily> SAP > Review results, and the Failed sequence number read 999.

20. **Exclude transfer credits/clock hours from required credit/clock hours** - If the **Validate for maximum time frame** option is selected, this option becomes enabled. Select this option to exclude transfer credits/clock hours from required credits/clock hours as part of the validation rule.

21. **Validate Partial Term** - This field indicates a student's terms should be checked to determine whether partial terms exist, and if found, not include them in the student's SAP calculation.

22. **Action(s) to perform if student exceeds maximum time frame of required credit/clock hours** - The following

fields are used to determine the action taken if a student exceeds the validation limit:

- SAP Status – This required field indicates the SAP Status to be assigned if the student fails SAP checking.
- School Status – Select a school-defined status to which the student is changed if the student fails the criteria specified in this condition.
- Student Group – Select a student group to which the student is assigned if the student fails the criteria in this condition. Only Manual Group types are available for selection here. You cannot select Dynamic, Static, or Frozen Groups.

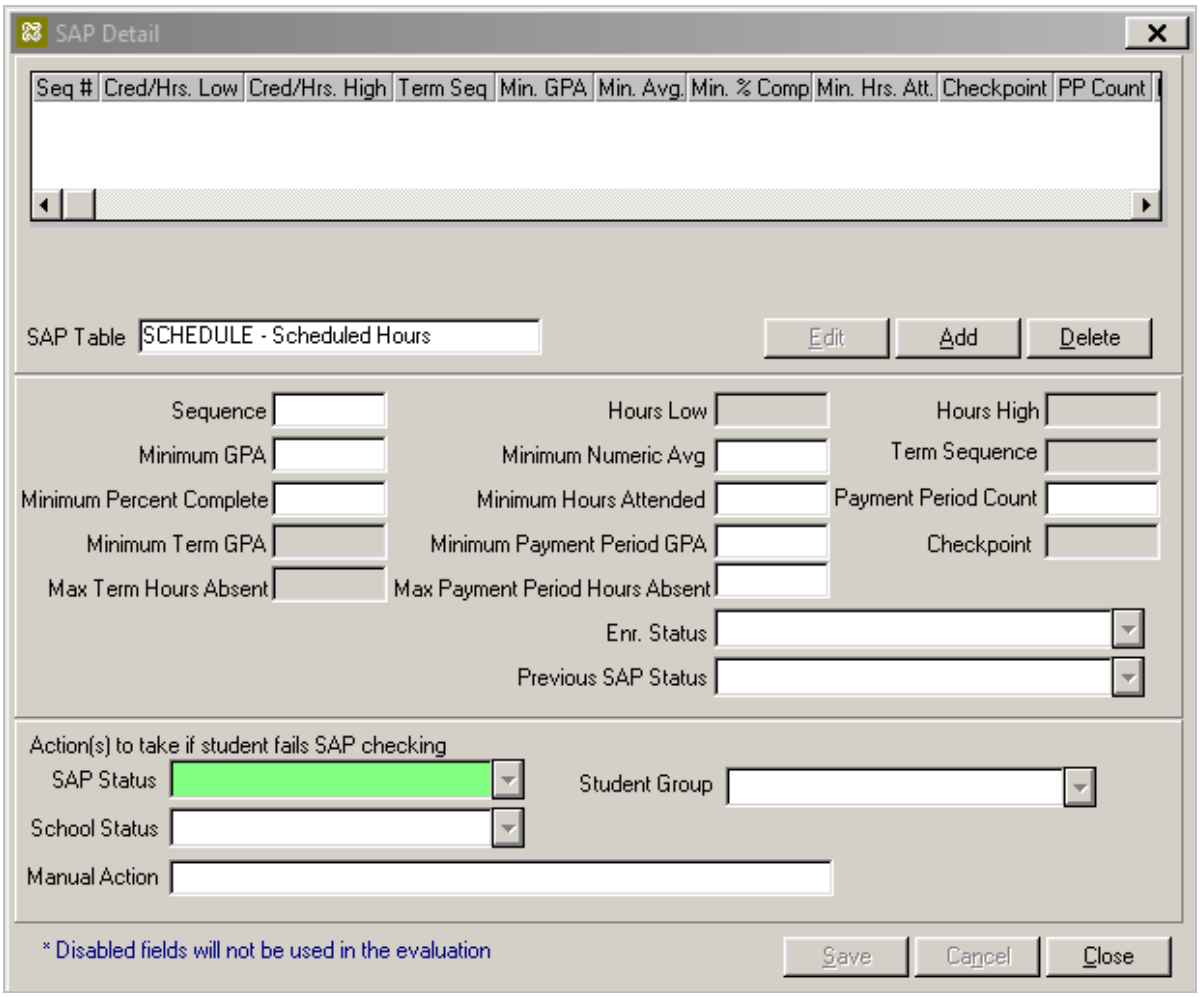
23. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

SAP Detail

The SAP calculation evaluates the student's academic progress based on the detail selections. All detail criteria entered or selected are evaluated. If the student fails any of the criteria, the SAP calculation reports all failed reasons.

To add or edit SAP details in the SAP table:

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **SAP**. The existing SAP codes are displayed on the grid.
3. Click **Add** to start a new SAP table or **Edit** to edit an existing table. The SAP Code Setup form is displayed. Enter the necessary information according to the SAP Codes procedure and click **Save**.
4. Click **Detail** on the SAP Code Setup form. The SAP Detail form is displayed.



The SAP Table field reflects the current SAP table associated with current SAP Details listed on the form.

5. Click **Add**, or select a record and click **Edit**.
6. In the **Sequence** field, enter a value to set the order in which the conditions in the SAP table are evaluated.

7. Enter unit values in the **Hours Low** and **Hours High** fields. The units are defined through the Based On option on the SAP Code Setup form; i.e., Credit Hours, Clock Hours By Attendance, or Clock Hours By Course.

    - Hours Low - Students are tested for a condition only if their credits attempted or hours scheduled are above or equal to the Hours Low value entered.

      This field is disabled if Scheduled hours is selected for the Attempted Hours basis when the SAP Policy is Based on Clock Hours by Attendance.

    - Hours High - Student are tested for a condition only if their credits attempted or hours scheduled are less than or equal to the Hours High value entered.

      This field is disabled if Scheduled hours is selected for the Attempted Hours basis when the SAP Policy is Based on Clock Hours by Attendance.

    Notes:

    - If SAP is based on Credit Hours, it evaluates the credits attempted based on the course credits attempted as seen in the student's final grades folder.
    - If SAP is based on Clock Hour by Attendance, Attempted Hours Basis of Attendance Totals, it calculates the hours Scheduled range from the student's detailed attendance records by adding up all present and absent attendance.
    - If SAP is based on Clock Hour by Attendance, Attempted Hours Basis of Scheduled Hours, it calculates the hours Scheduled from the Scheduled Period Hours for the classes that the student attempted.
    - If SAP is based on Clock Hour by Course, it evaluates the hours attempted based on the course hours attempted as seen in the student's final grades folder.

8. If a student is tested for this condition and the student's cumulative GPA is below the **Minimum GPA** value entered, the student is not making satisfactory academic progress.
9. If a student is tested for this condition and the student's cumulative numeric average is below the **Minimum Numeric Avg** value entered, the student is not making satisfactory academic progress.
10. If the units of the SAP table are **Credit Hours**, a student is not making satisfactory academic progress when the student's percentage of credits completed to credits attempted falls below the **Minimum Percent Complete** value entered.

    If the units of the SAP table are **Clock Hours**, a student is not making satisfactory academic progress when the student's percentage of hours attended to hours scheduled falls below the **Minimum Percent Complete** value entered.

11. If the units of the SAP table are **Clock Hours**, a student is not making satisfactory academic progress when the student's hours attended falls below the **Minimum Hours Attended** value entered.
12. Enter the **Term Sequence** number of the term to which this detail listing belongs. For instance, the student's third term in school would have a term sequence of 3. The Term Sequence is not required, and a null value is populated with a zero. You can specify a term sequence and to leave zeros in the credit **Hours Low** and **Hours High** columns.

    This field is disabled if Scheduled hours is selected for the Attempted Hours basis when the SAP Policy is Based on Clock Hours by Attendance.

    Note: Evaluation of Term Sequence works with linked enrollments.

13. The **Payment Period Count** field (**PP Count** column in grid) is used to designate whether this SAP detail line

should be evaluated for the student. For example, if the student was in AY 2 PP 2 count 4 and this detail line count was set to 1, the student would not be evaluated for this detail line.

PP Count Example

AY/PP	Count
AY 1 PP 1	1
AY 1 PP 2	2
AY 2 PP 1	3
AY 2 PP 2	4

14. The student fails the SAP evaluation if the student's term GPA is less than the value specified in the **Minimum Term GPA** field.
15. The student fails the SAP evaluation if the student's payment period GPA is less than the value specified in the **Minimum Payment Period GPA** field.
16. Select the enrollment status (full time, 3/4 time, half time, less than half time) to which these conditions apply in the **Enr. Status** field. If the student's enrollment status matches this selection, the student's progress is compared to this condition when calculating SAP. If you do not select an enrollment status (and it is left blank), the conditions in the detail line apply to all student enrollment statuses.
17. The student fails the SAP evaluation if the student's number of hours missed for the term exceeds the maximum value specified in the **Max Term Hours Absent** field.
18. The student fails the SAP evaluation if the student's number of hours missed for the payment period exceeds the maximum value specified in the **Max Payment Period Hours Absent** field.
19. The optional **Previous SAP Status** field indicates that the SAP sequence is conditional on the student's previous term SAP status being equal to the SAP status defined here. If a student's previous term record does not equal the status defined here, the condition is not met. The drop-down list includes all active SAP statuses.

    Note: Evaluation of Previous SAP Status works with linked enrollments. If this field is left blank, Previous SAP Status is no longer considered an evaluation criterion for SAP; it does not mean that the student has a blank previous SAP status.
20. Enter a value for the **Checkpoint** field, if applicable. The following rules apply when considering SAP checkpoints:
    - This field cannot be used with Payment Period SAP. It only works with term based SAP.
    - SAP details may be configured with the ability to set up checkpoints. The checkpoint value consists of a number between 1 and 255. A zero value indicates that there is no checkpoint associated with the SAP detail.
    - When calculating SAP for individual students or student groups or in a batch mode, the SAP evaluation includes checkpoint evaluation only on SAP sequences where a checkpoint number is specified.
    - When evaluating checkpoints, the SAP evaluation is modified to determine the student's previous checkpoint value that was determined the last time SAP was executed on the student.

      Note: Checkpoints are evaluated across linked enrollments.
    - When executing SAP, evaluation ignores sequences in the SAP table that have a checkpoint greater than 0, but less than or equal to any previous checkpoints evaluated.

- Upon completion and update of the SAP evaluation, the checkpoint value is stored to the SAP Audit table to indicate the last checkpoint evaluated.
- A student is only evaluated if the student details meet the SAP evaluation criteria, and the student has not previously been evaluated for the sequence checkpoint.
- If the students are not evaluated due to not meeting any of the checkpoints, they are still evaluated for the items on the **SAP Code Setup** form, such as maximum tine frame validation and maximum attempts.
- The SAP checkpoint information is displayed on the SAP Report, Student SAP Audit Report, and SAP Audit Report.

21. Select **Action(s) to take if student fails SAP checking**:
    - Select a **SAP Status** that is assigned to the detail criteria when the student fails the SAP evaluation process. The drop-down list includes all active SAP statuses.
    - Select a **School Status** that is assigned to a student when the student fails the criteria specified above. These values are school-defined.
    - Select a **Student Group** that the student will be placed in when the student fails the SAP detail criteria outlined in your selection in the **SAP Detail** form.

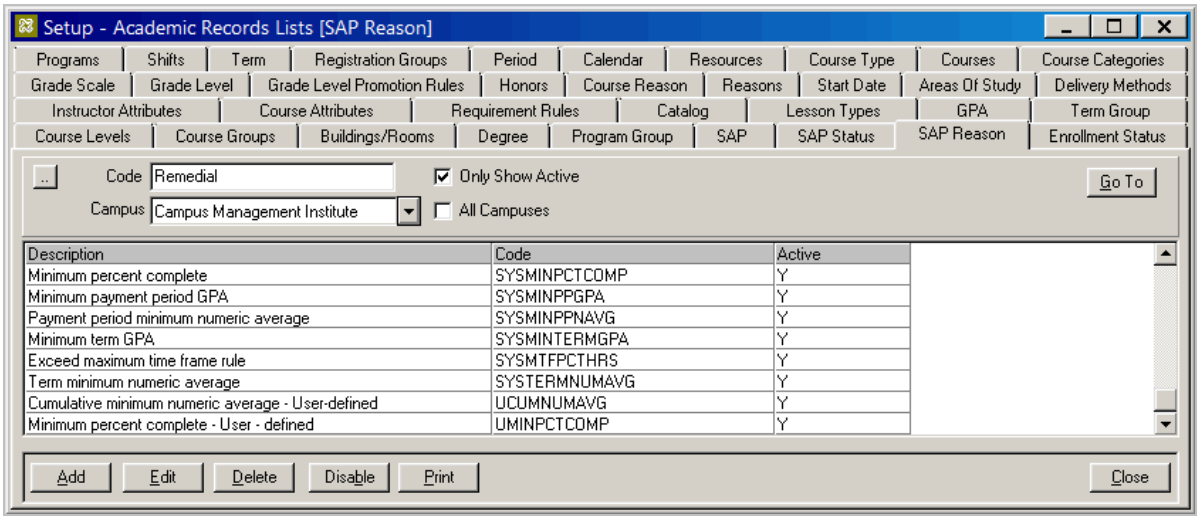
    Note: Only Manual Group Types are available for selection. You cannot select a Dynamic, Static, or Frozen Group for the **Student Group** field.
22. Enter a note in the **Manual Action** field that describes any manual action that needs to be taken when a student fails the SAP evaluation process.
23. Continue adding detail listings and saving them until all SAP parameters are entered for the SAP table.
24. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Academic Records Lists [SAP Reason]

Satisfactory academic progress (SAP) failure reasons can be customized for all SAP criteria defined on the SAP policy (see SAP Codes). Merge fields can be used in defining the failure reason description. If custom failure reasons are defined, CampusNexus Student uses them instead of the system-defined reasons when evaluating SAP criteria (see SAP Details). Letter activities can be created using SAP failure reasons as merge fields, which can be assigned to students who do not meet SAP.

To add or edit a list of SAP reason codes:

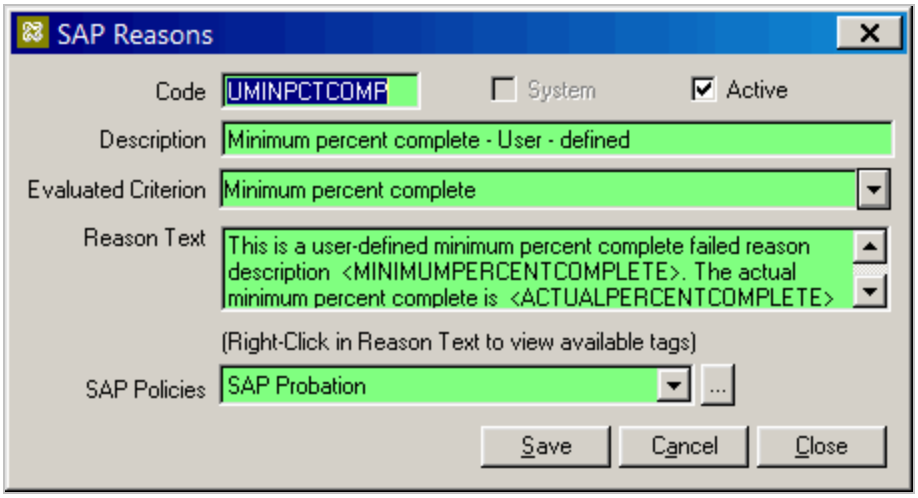
1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **SAP Reason**.



Note the following about SAP reason codes:

- SAP reason codes can be system-defined or user-defined (custom).
- System-defined SAP reason codes begin with *SYS*.
- System-defined SAP reason codes are always active.
- System-defined SAP reason codes cannot be edited or added.

3. Click **Add**, or select a record and click **Edit**. The SAP Reason Code Setup form is displayed.



4. Specify a unique **Code**.

   Since system-defined SAP reason codes begin with SYS, we recommend that you do not use this prefix for the Code field of a user-defined SAP reason code.

   When you add or edit a SAP reason code, the **System** check box, which identifies system-defined SAP reason codes, is always disabled.

5. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
6. Enter a **Description**.
7. From the **Evaluated Criterion** list, select a criterion to assign it to the SAP reason code that you are adding or editing. The system-defined SAP criteria (SAP Details are evaluated during the SAP calculation process.

   The same Evaluation Criterion can be assigned to multiple SAP policies. But when an Evaluation Criterion has already been assigned to a SAP policy, and you try to create a new SAP reason code for the *same* policy, an error message is displayed because each Evaluation Criterion can only be assigned to a SAP policy once.

8. In the **Reason Text** field, type the text to include in letters sent to students who do not meet the specified SAP criteria for the SAP failure reason.

   You can also insert variables that are used as mail merge fields. Right-click the Reason Text field to select a variable. Only one variable at a time may be selected; however, multiple variables may be included in the Reason Text field.

The value of the selected variable is displayed in the letter sent to the student. (Note the name of the variable enclosed by the <> symbols.)

The variables represent the SAP criteria values. The calculated values of the variables are used in the SAP calculation for each student.

8. From the **SAP Policies** drop-down list, select the SAP policy (SAP Codes) associated with the SAP failure reason.

   Note: For system-defined SAP reasons, the SAP Policies field is always blank because system-defined SAP reasons can be assigned to any SAP Policy.

9. Set up a new Letter Activity for the letters sent to students who failed to meet the SAP criteria for this SAP failure reason.

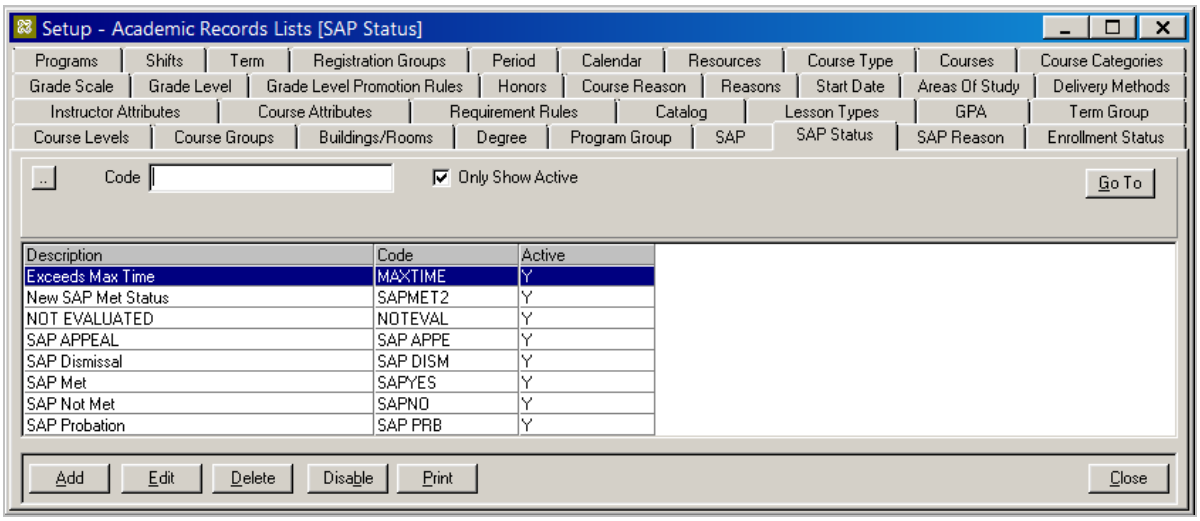
If letter activities are assigned during the SAP calculation process, each student not meeting SAP is assigned a pending letter activity that is posted in the student's activities folder and the faculty member's Contact Manager folder. Once the letters are printed, the activity is closed. CampusNexus Student assigns a completion date at that time and assigns it to the student's activity.

Setup - Academic Records Lists [SAP Status]

SAP status codes are used to indicate whether a student is making Satisfactory Academic Progress (SAP). You can add SAP status codes to indicate conditions under which the student is not making satisfactory academic progress.

To add or edit SAP status codes and associate student groups with SAP status codes:

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **SAP Status**.



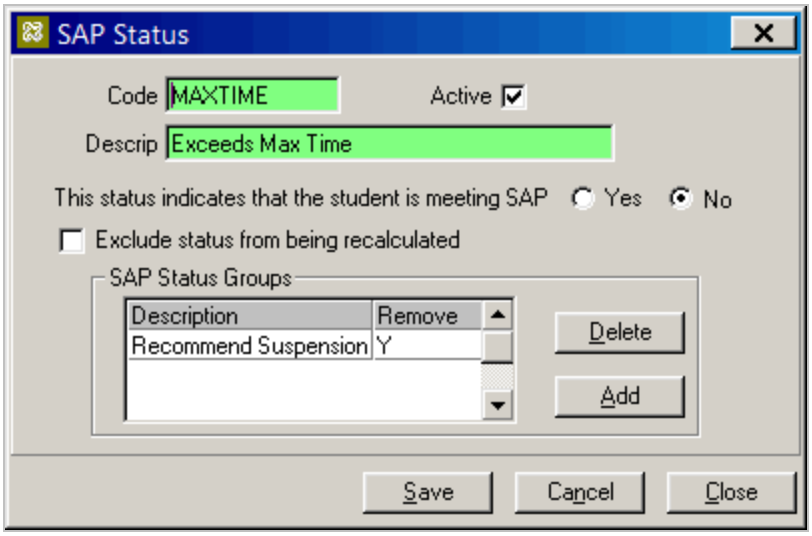
CampusNexus Student provides two system-defined SAP status codes and descriptions:

- The SAPYES code is assigned to the 'SAP Met' description field. You can add more 'SAP Met' codes and descriptions. Students meeting SAP are assigned to this SAP status code by default.
- The SAPNO code is assigned to the 'SAP Not Met' description field. You can edit the system-defined description.

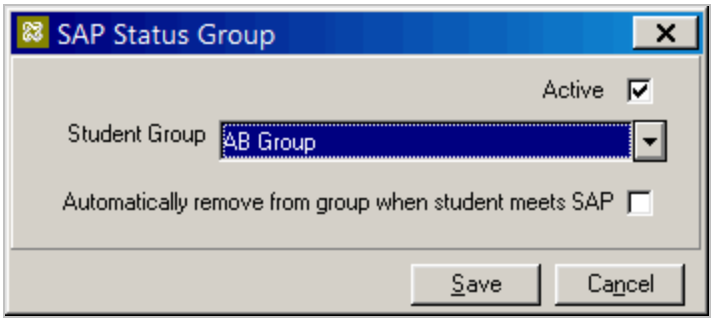
A warning message is displayed if you attempt to delete a SAP status code that is already associated with SAP Detail criteria. The message reads as follows, and no action occurs: *'This SAP Status is in use, delete cancelled'.*

You can add or edit SAP Status codes for Satisfactory Academic Progress (SAP Met) and Non-Satisfactory Progress (SAP Not Met) statuses.

3. Click **Add**, or select a record and click **Edit**. The SAP Status Code Setup form is displayed.



4. Specify a unique **Code**.
5. Enter a **Description**.
6. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
7. For the option **This status indicates that the student is meeting SAP**, select Yes or No as applicable.
8. Select **Exclude status from being recalculated** if this status is to be excluded from recalculation in manual and automatic SAP processing.
9. Click **Save**. If you attempt to create a SAP Status that already exists, a message informs you that the code exists and the save operation is cancelled. Click **OK**.
10. To associate student groups with the SAP Status, click **Add** in the SAP Status Group area. The SAP Status Group form is displayed.



11. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
12. Select a **Student Group**.
13. Select the **Automatically remove from group when student meets SAP** check box if applicable.
14. If you attempt to assign a student group to a SAPYES status, a message informs you that you cannot add student groups when the status is SAP Met. Click **OK**.
15. To remove a Student Group from the list, select the Student Group, and click **Delete**.
16. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

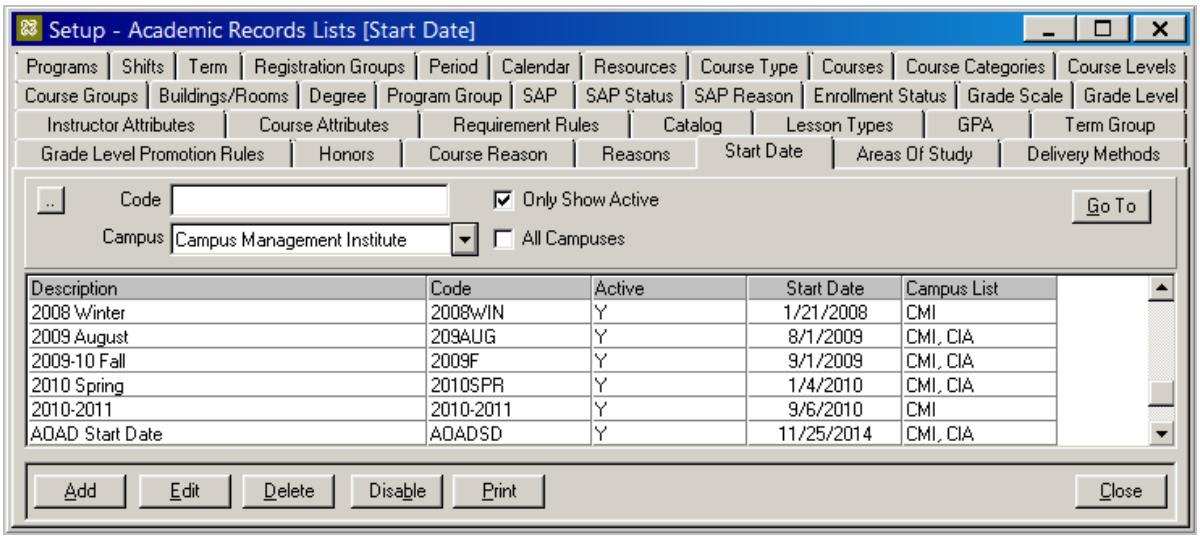
Setup - Academic Records Lists [Start Date]

Start dates are related to program versions. One or more program versions start on the dates entered in this table. After setting up a start date, you can select the program versions that start on that date. This is an efficient method of setting up a start date for multiple program versions without opening each program version setup record individually.

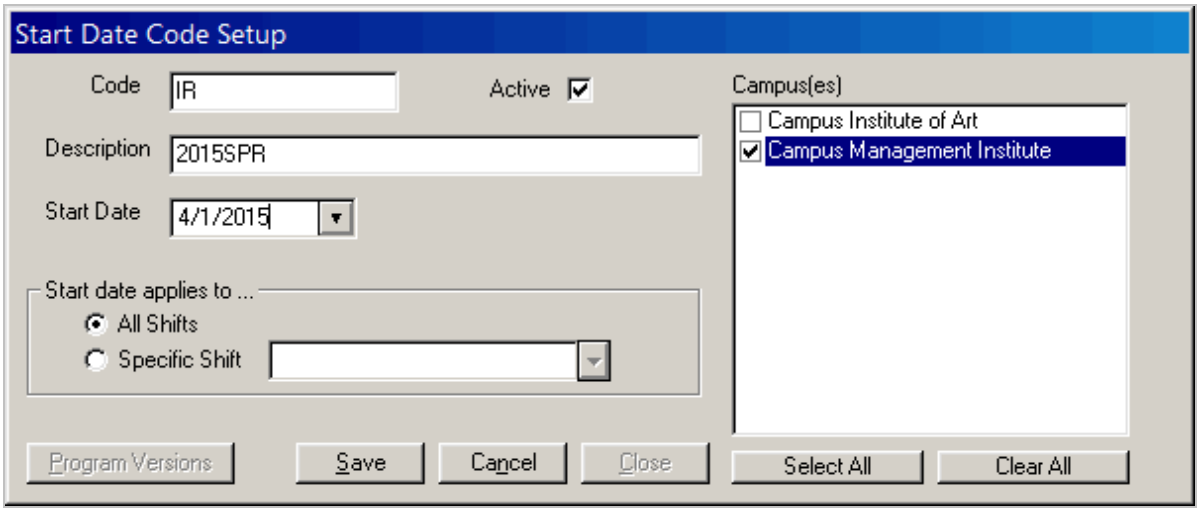
Note: When you delete a record from the start date table, any program version relationship to the start date is also deleted. The program version setup is not deleted.

To add or edit a list of start date codes:

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Start Date**.

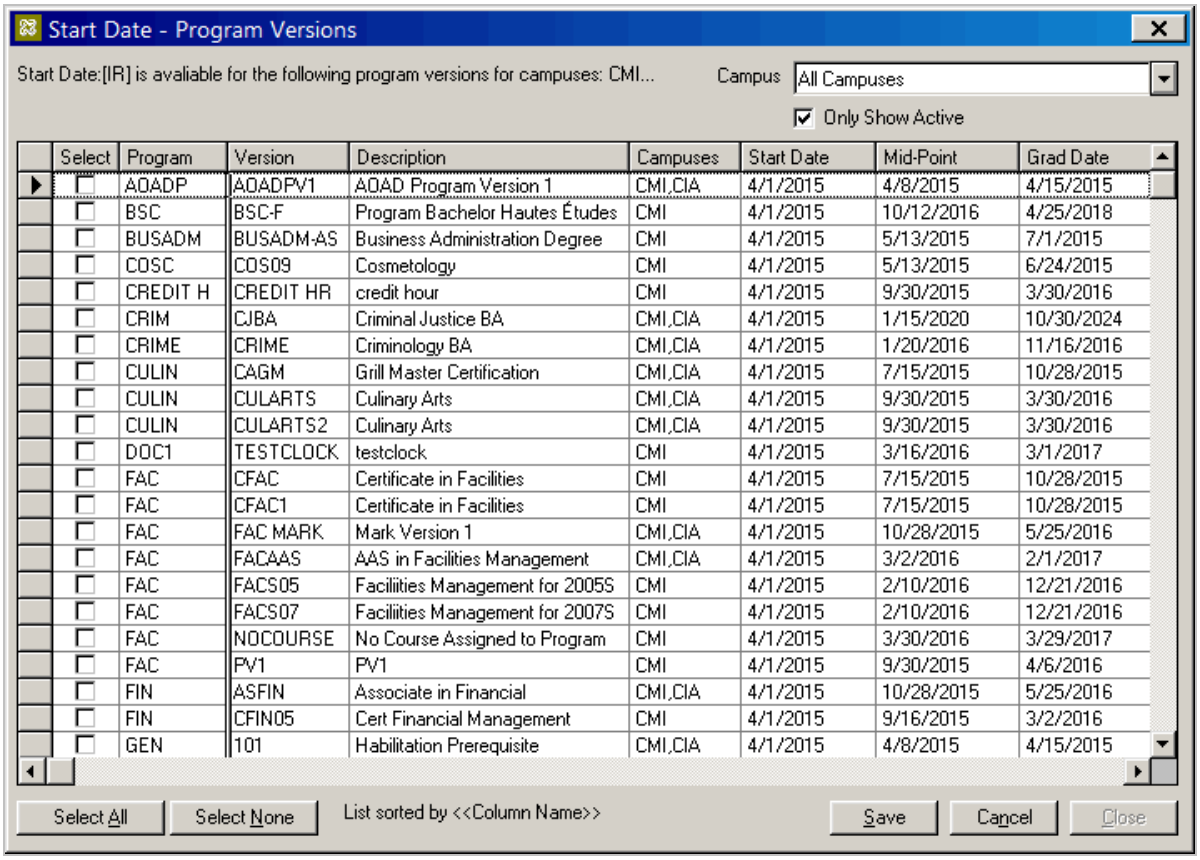


3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Start Date Code Setup form is displayed.



7. Specify a unique **Code**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.

   When you select or clear the start date Active flag, all related program version selections are set to match. (Only the relationship records linking the start date to the program version are affected, not the program version setup.)
9. Enter a **Description**.
10. Select one or more **Campuses**.
11. Enter the **Start Date** or click to select the date from the calendar.
12. Select one of the "Start date applies to" options.
    - If you select **All Shifts**, CampusNexus Student stores a zero to the Shift ID field.
    - If you select a **Specific Shift**, click to select a shift. CampusNexus Student stores the Shift ID from the list selection.
13. Click **Save**.
14. Click **Program Versions**. The Start Date - Program Versions form is displayed. It lists all program versions that you can associate with the new start date.



Select	Program	Version	Description	Campuses	Start Date	Mid-Point	Grad Date
☐	AOADP	AOADPV1	AOAD Program Version 1	CMI,CIA	4/1/2015	4/8/2015	4/15/2015
☐	BSC	BSC-F	Program Bachelor Hautes Études	CMI	4/1/2015	10/12/2016	4/25/2018
☐	BUSADM	BUSADM-AS	Business Administration Degree	CMI	4/1/2015	5/13/2015	7/1/2015
☐	COSC	COS09	Cosmetology	CMI	4/1/2015	5/13/2015	6/24/2015
☐	CREDIT H	CREDIT HR	credit hour	CMI	4/1/2015	9/30/2015	3/30/2016
☐	CRIM	CJBA	Criminal Justice BA	CMI,CIA	4/1/2015	1/15/2020	10/30/2024
☐	CRIME	CRIME	Criminology BA	CMI,CIA	4/1/2015	1/20/2016	11/16/2016
☐	CULIN	CAGM	Grill Master Certification	CMI,CIA	4/1/2015	7/15/2015	10/28/2015
☐	CULIN	CULARTS	Culinary Arts	CMI,CIA	4/1/2015	9/30/2015	3/30/2016
☐	CULIN	CULARTS2	Culinary Arts	CMI,CIA	4/1/2015	9/30/2015	3/30/2016
☐	DOC1	TESTCLOCK	testclock	CMI	4/1/2015	3/16/2016	3/1/2017
☐	FAC	CFAC	Certificate in Facilities	CMI	4/1/2015	7/15/2015	10/28/2015
☐	FAC	CFAC1	Certificate in Facilities	CMI	4/1/2015	7/15/2015	10/28/2015
☐	FAC	FAC MARK	Mark Version 1	CMI,CIA	4/1/2015	10/28/2015	5/25/2016
☐	FAC	FACAAS	AAS in Facilities Management	CMI,CIA	4/1/2015	3/2/2016	2/1/2017
☐	FAC	FACS05	Facilities Management for 2005S	CMI	4/1/2015	2/10/2016	12/21/2016
☐	FAC	FACS07	Facilities Management for 2007S	CMI	4/1/2015	2/10/2016	12/21/2016
☐	FAC	NOCOURSE	No Course Assigned to Program	CMI	4/1/2015	3/30/2016	3/29/2017
☐	FAC	PV1	PV1	CMI	4/1/2015	9/30/2015	4/6/2016
☐	FIN	ASFIN	Associate in Financial	CMI,CIA	4/1/2015	10/28/2015	5/25/2016
☐	FIN	CFIN05	Cert Financial Management	CMI	4/1/2015	9/16/2015	3/2/2016
☐	GEN	101	Habilitation Prerequisite	CMI,CIA	4/1/2015	4/8/2015	4/15/2015

Note: Only program versions that meet the following conditions are listed based on the selected campuses :

- Their start date is associated with the selected campuses and the user has permissions to the campuses.
- The start dates are associated only with the campuses listed, which met condition # 1.

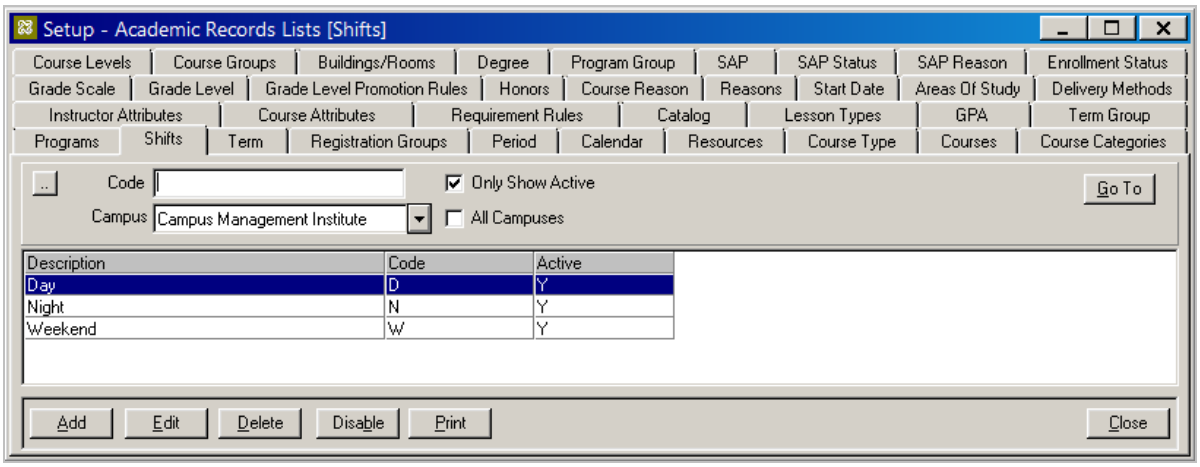
15. In the Select column, select the **Program Versions** that start on the date you entered in the Start Date Code Setup form. You can clear any program version that was previously selected. Click **Select All** or **Select None** to select or clear all program versions listed.
16. Scroll the grid horizontally to view all columns. Program, Version, Description, Campuses, and Start Date are read-only fields.
17. Click the **Mid-Point** field to display a calendar. Double-click a date to post it to the **Grad Date** field.
18. Click the **Grad Date** field to display a calendar. Double-click a date to post it to the **Max End Date** field.
19. Click the **Max End Date** field to display a calendar. Double-click a date to post it to the **Extern Start Date** field.
20. Edit the **Max. Starts**, **Min. Starts**, and **Budget Starts** fields if needed.
21. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Academic Records Lists [Shifts]

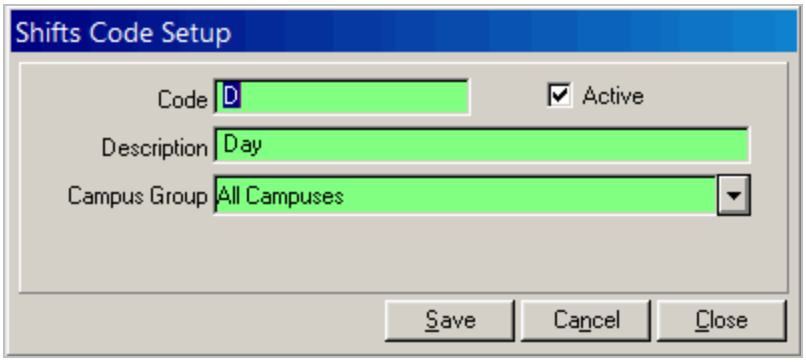
The Shifts list is used to define the blocks of time during which classes are conducted in your institution. Shifts are used in the definition of terms and program versions (start dates). Each shift code can be associated with all campuses or with a campus group.

To add or edit a list of shift codes:

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Shifts**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Shifts Code Setup form is displayed.



7. Specify a unique **Code**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Enter a **Description**.

10. Select a **Campus Group**.
11. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

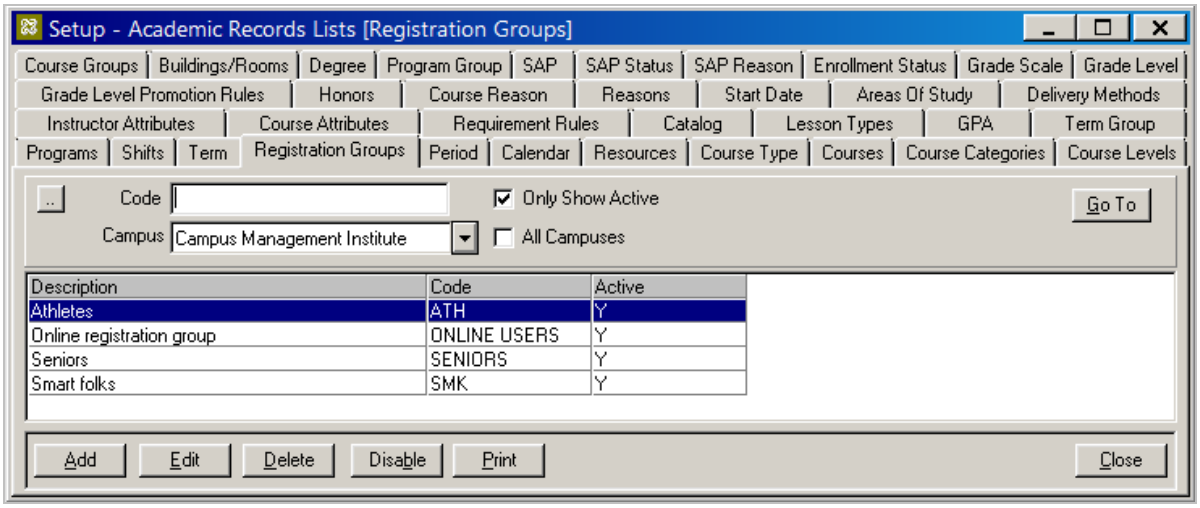
Setup - Academic Records Lists [Registration Groups]

To enhance the registration capabilities in CampusNexus Student, registration groups are used to set priority among registering students, control advisement, and set other rules that may govern a student's registration schedule. If a campus decides to use registration groups, registration groups need to be set up under Academic Records > Lists. Once they are set up, they appear in drop-down lists throughout CampusNexus Student.

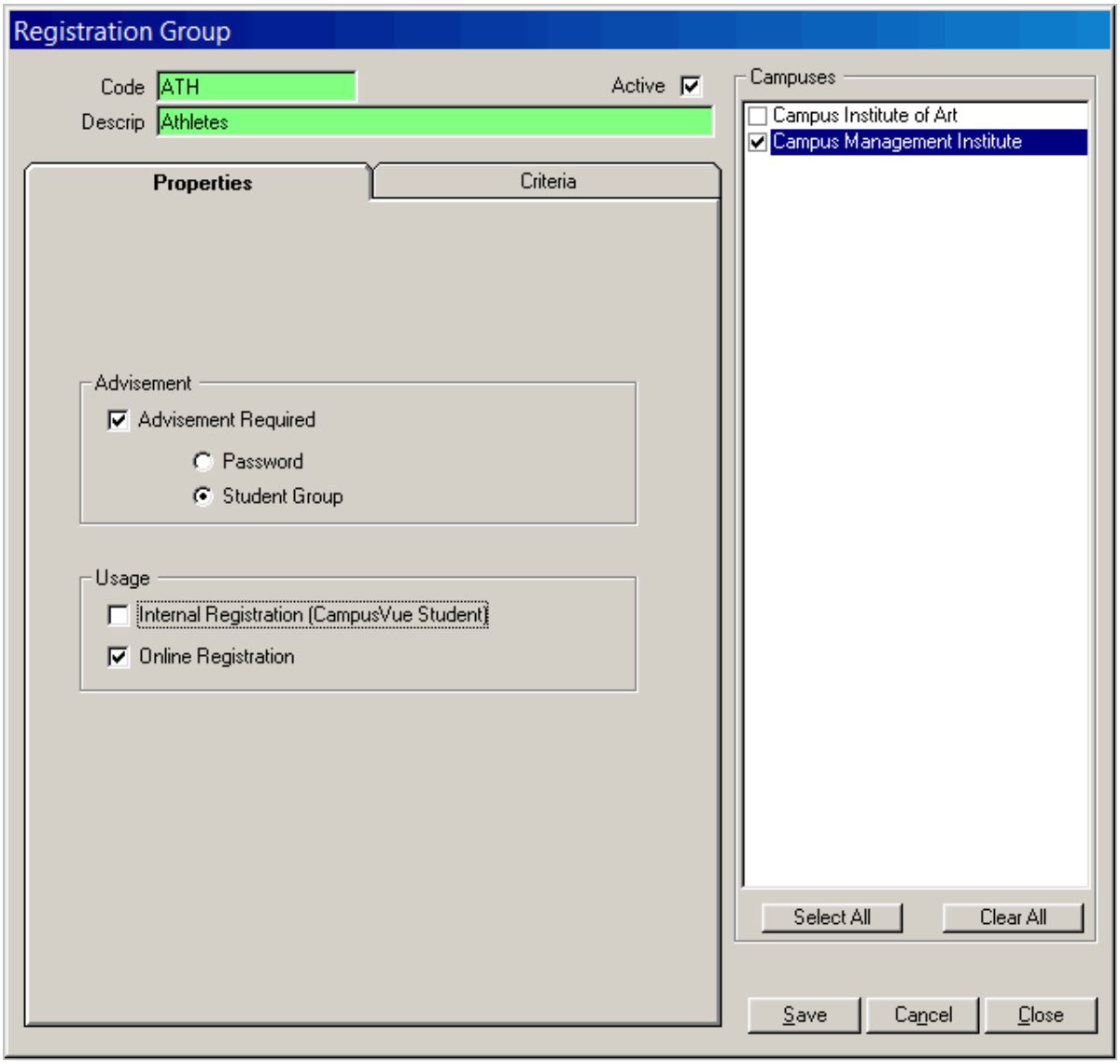
Using Define Term Registration Group procedure, you can assign groups and their priorities to the term to be enforced during manual registration or online registration.

To add or edit a list of registration groups codes:

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Registration Groups**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Registration Group form is displayed.

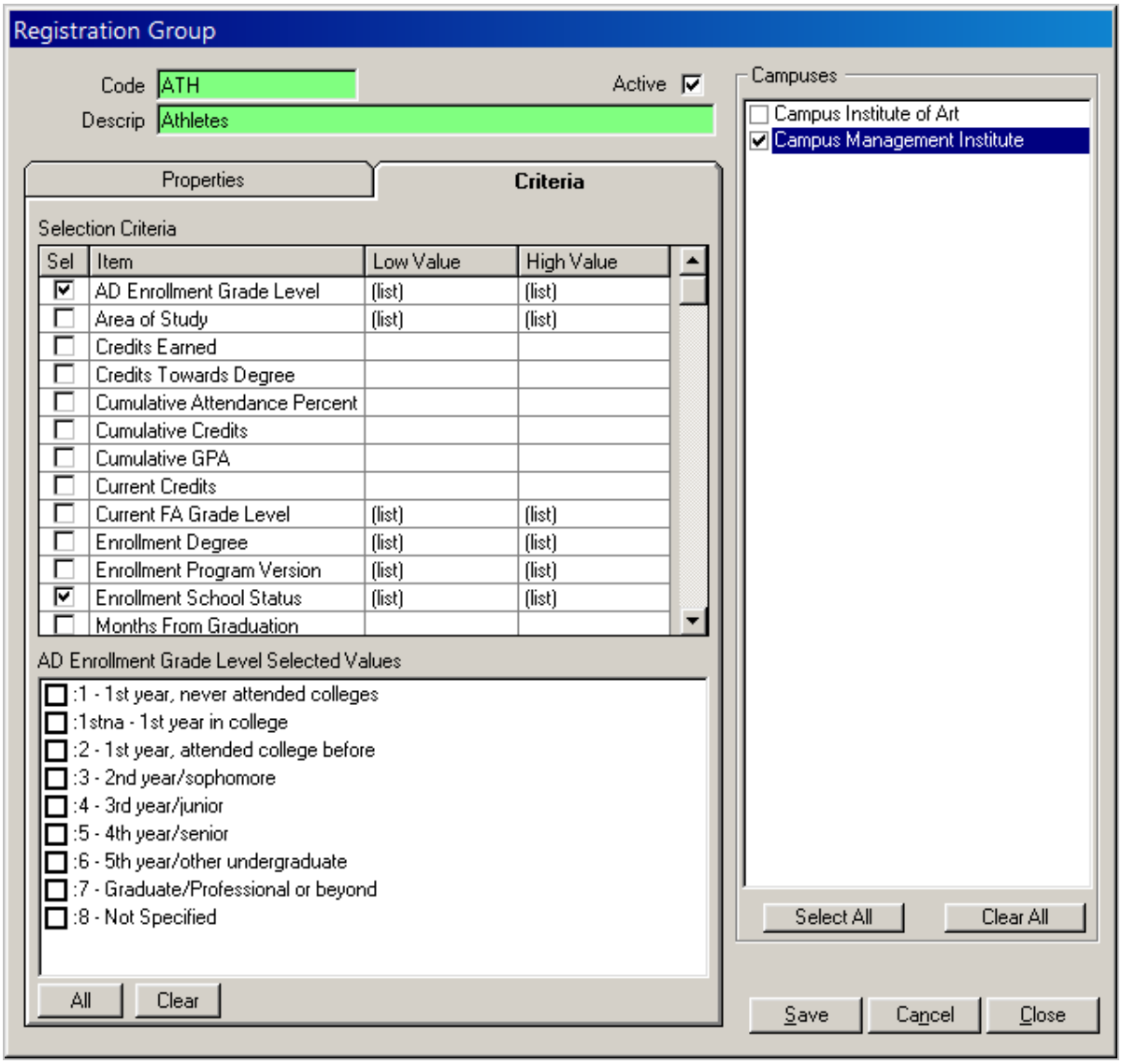


7. Specify a unique **Code**.
8. Enter a **Description**.
9. The **Active** check box is selected by default. This makes the registration group available when registration groups are assigned to a term. Clearing this check box allows you to disable a group without deleting its options.
10. Select one or more **Campuses**.
11. Select appropriate options in the Properties tab:
    - Select **Advisement Required** to automatically place an advisement hold on any student in this group. Two methods of hold are provided:
        - The student can obtain a randomly generated **Password** and provide this to the Advisor to release the hold and continue enrollment.

- The student is held by being a member of this **Student Group**. The hold is lifted when the student is no longer a member of the group (the student has satisfied the restrictions).

- Select **Internal Registration (CampusNexus Student)** to register students through CampusNexus Student.
- Select **On-Line Registration** to allow students to register online using Portal.

12. Select appropriate options in the Criteria tab (see Registration Group Criteria). All students who meet the requirements set by the criteria for a registration group are allowed to register (online or internally, as enabled in the Properties tab).



Registration Group Criteria

Criteria	Description
AD Enrollment Grade Level	Select from a list displayed at the bottom of the form.
Area of Study	When selected, a list of available areas of study is displayed at the bottom of the form. Select one or more areas of study.
Credits Earned	Total of completed credits. Specify low and high values.
Credits Toward Degree	Completed credits that apply to degree. Specify low and high values.
Cumulative Attendance Percent	Specify low and high values.
Cumulative Credits	Completed Credits + Scheduled/Current Credits. Specify low and high values.
Cumulative GPA	Specify low and high values.
Current Credits	Total number of credits in Current Status at time of Registration. Specify low and high values.
Current FA Grade Level	Select from a list displayed at the bottom of the form.
Enrollment Degree	Select from a list displayed at the bottom of the form.
Enrollment Program Version	Select from a list displayed at the bottom of the form.
Enrollment School Status	Select from a list displayed at the bottom of the form.
Months from Graduation	Specify low and high values.
Remaining Credits to Graduate	The number of credits required for the student to receive a degree. Specify low and high values.
Scheduled Credits	Total number of credits in Scheduled or Current Status at time of Registration. Specify low and high values.
Student Groups	When selected, a list of active available student groups is displayed at the bottom of the form. Expired student groups may be selected. Select one or more student groups.
Student Last Name	Specify the first three letters of the student's last name.

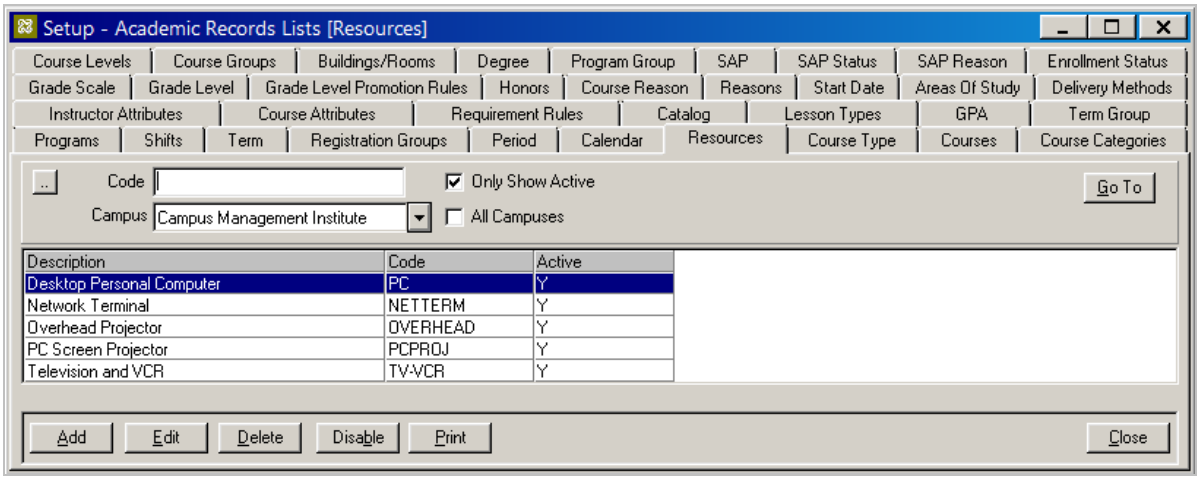
13. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Academic Records Lists [Resources]

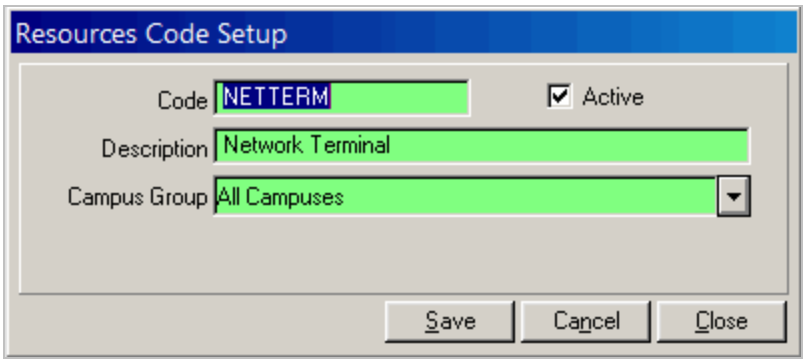
Resources are items that can be related to classrooms or courses. For example, a projector may be assigned to a classroom used for teaching English. The same item can also be related to a course that teaches German. When resources are related to a course, you can enter the number of resource units and indicate whether the units are required or optional. When resources are related to a room, you can specify the number of units in the room.

To add or edit a list of resources codes:

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Resources**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Resources Code Setup form is displayed.



7. Specify a unique **Code**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.

9. Enter a **Description**.
10. Select the **Campus Group** that uses the resource.
11. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

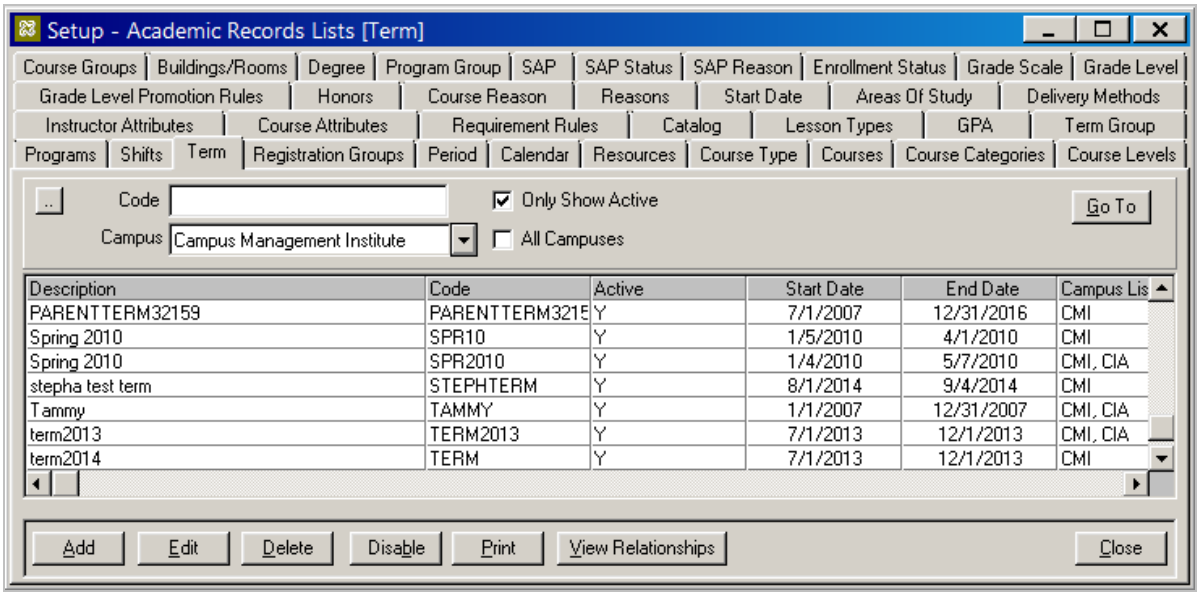
Setup - Academic Records Lists [Term]

The Term list establishes the beginning and ending dates of your institution's academic terms. Each term listed can be assigned to one or more campuses and to a shift such as day, evening, or weekend. A term can also be marked as a Global Extract term (if your institution uses Global as an FA servicer).

Note: You cannot delete a term when classes or ledger card entries are assigned to the term.

To add or edit a list of term codes:

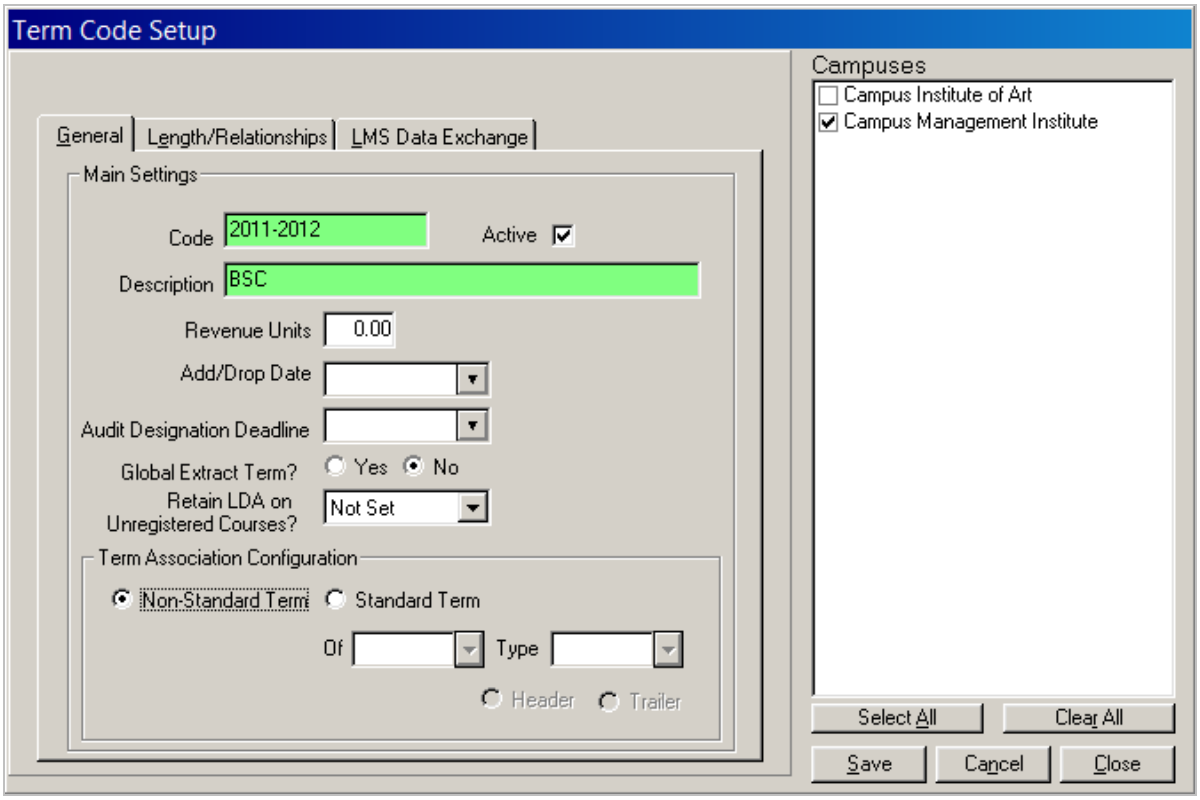
1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Term**. The list of existing term codes is displayed. By default the list is sorted in descending order by the End Date. Click the column headers to change the sort order.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **View Relationships** to see terms related to a selected term.
7. Click **Add**, or select a record and click **Edit**. The Term Code Setup form is displayed. Complete the following tabs as applicable:
    - General
    - Length/Relationships
    - Web Registration
    - LMS Data Exchange

To complete the General tab:

1. Click the **General** tab on the Term Code Setup form.



2. Specify a unique **Code**.

   If the term code you enter is already on file, a form lists duplicate codes and campuses to which they are assigned. After reviewing the list, to continue adding the duplicate term code, click **Add**. The Term Code Setup form is displayed again, after eliminating all campuses that are already using the duplicate term code. Complete the entry of the form parameters, including the selection of campuses that offer the term, and save the new record.

3. Enter a **Description**.

4. Select or clear the **Active** check box to designate the record as active or inactive, respectively.

5. Select one or more **Campuses**. You cannot save the term record without selecting at least one campus.

   You are selecting individual campuses to which the term code applies, not campus groups. If you do not have access to a campus in the list, the campus name is enclosed in brackets [ ]. When saving the record, a campus group is dynamically created or updated for all campuses selected. The campus group type is set to 'T' for the new campus group.

6. Depending on a term's start and end dates, the revenue calculation calculates that a term is N.5 months long. Some institution want to earn only N months of revenue. Enter **Revenue Units** to override the term length calculation. This setting only applies to institutions that bill by term and earn by month.

7. Select the **Add/Drop Date**, which is the last date when students are allowed to modify their schedule for this term.

8. Specify the **Audit Designation Deadline** based on the term associated with the course. You cannot register a

student for a course as Audit after this date. If the date entered is not a valid date, an error message is displayed.

9. If your institution is set up to send data to a third party servicer such as Global, the option **Global Extract Term?** is displayed. Select Yes or No as required.

   Note: The flag that determines whether this field is displayed is selected under Setup > Campus Locations > Campuses > Financial Aid (tab). CampusNexus Student determines if any campus in the selected campus group is set up to extract to Global. If a record is found where SyCampus.ServicerLink = 'G', CampusNexus Student displays the Global Extract term? field.

10. Select one of the following values from the **Retain LDA on Unregistered Courses** list:

    - Not Set - Allows the LDA to be modified depending on the 'Retain LDA on Unregistered Courses' setting at the campus level. This setting is in effect only for this term unless overridden by a similar 'Retain LDA on Unregistered Courses' setting contained within a specific course reason code.
    - No - Allows the student's attendance records for the unregistered course to be lost and the LDA reset to the last date the student was in attendance in courses other than the unregistered course.
    - Yes - Keeps the LDA for the specific course, even though the attendance records are removed.

11. In the **Term Association Configuration** area:

    - Select **Non-Standard Term** when FA Academic Calendar 1 (non-standard terms) is selected in the FA Program Version Setup (this option disables the Standard Term button and drop-down lists).
    - Select **Standard Term** and **Type** when configuring scheduled academic years (SAYs). Terms that are configured with these options are used in SAYs.

    When **Standard Term** is selected the following options are available:

    - **Of** - Quarter, Semester, and Trimester
    - **Type** - Fall, Winter, Spring, and Summer

12. You can specify a Standard Term to be a **Summer** (Type) **Header**, or **Trailer**, or neither. The Summer Header or Trailer options are enabled only for the Standard Term of Type Summer. Choose only one of the Header or Trailer options for the Summer Term.

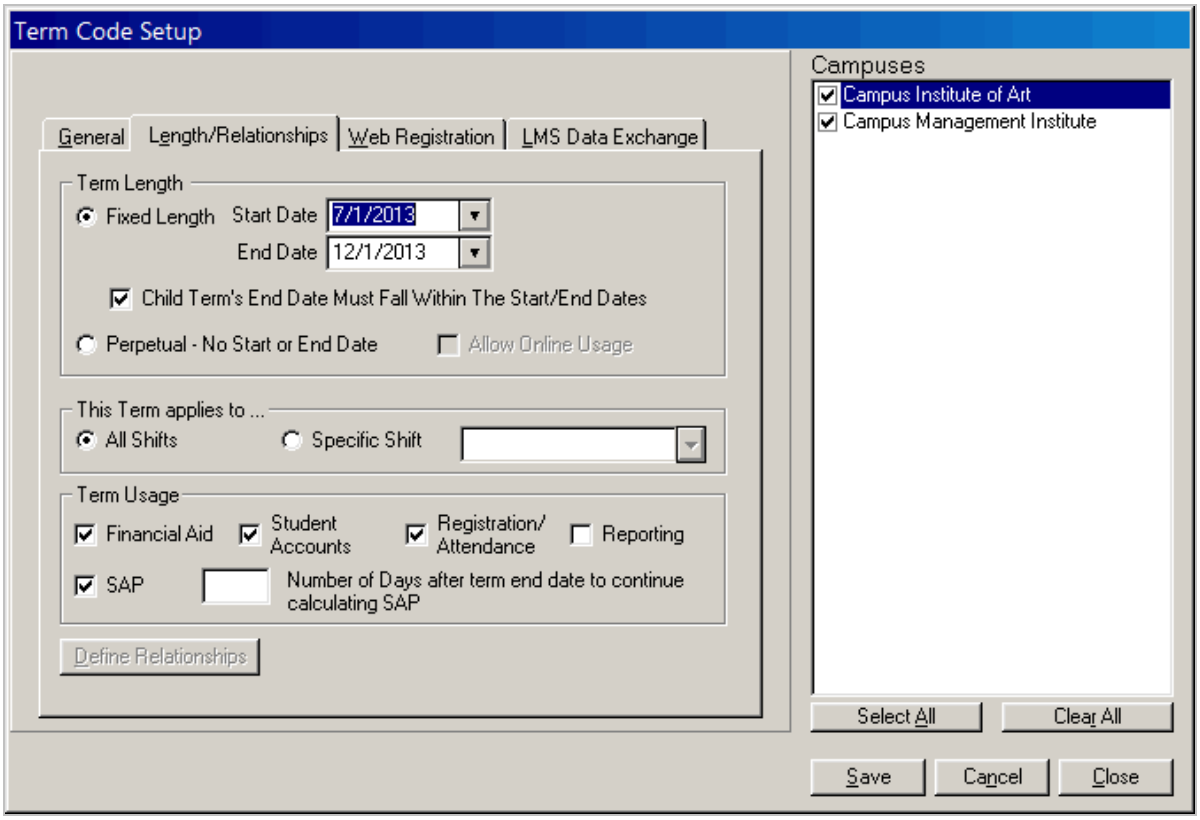
    To clear a previously selected Header or Trailer option, use the Delete key. (This applies only to Header or Trailer options.)

    By configuring a Summer term to be a Header or Trailer in the SAY, student financial aid packaging can be done for all possible terms at once, allowing students to plan their schedules for the year based on the availability of funding for each semester. For example, students can budget using all their annual funds by allocating the extra funds from the Fall and Spring semesters to the Summer semester to make up for any shortage of funds.

13. Click **Save**.

To complete the Length/Relationships tab:

1. Click the **Length/Relationships** tab on the Term Code Setup form.



2. For Term Length, select **Fixed Length** or **Perpetual - No Start or End Date**.

   If you select Fixed Length, specify the **Term Start Date** and **Term End Date**.

   Note: If you have overlapping start and end dates for multiple terms at the same campus and on the same shift, you may run into conflicts when scheduling classes and instructors in rooms and students in class sections. Be sure you do not have resource conflicts if you overlap term dates.

3. If this is a perpetual term without a start or end date, the **Allow Online Usage** check box is enabled. Select this check box if you want this perpetual term to appear in Portal.

4. Select the option of enforcing whether the end date for any of the term's child terms must fall within the start and end dates of the parent term. To enforce the rule, select **Child Term's End Date Must Fall Within The Start/End Dates**.

   This check box is disabled if the term is set to Perpetual - No Start or End Date.

5. Select **All Shifts** or **Specific Shift**.

   If you select Specific Shift, select the **Shift** to which this term applies.

6. For Term Usage, select one of the options to determine how this term is used.

   - Select **Financial** if the term is used for scheduling financial aid.
   - Select **Student Accounts** if the term is used for posting financial aid or billing.

- Select **Registration/Attendance** if the term is used for registration and attendance.
- Select **Reporting** if the term is used for reporting only.

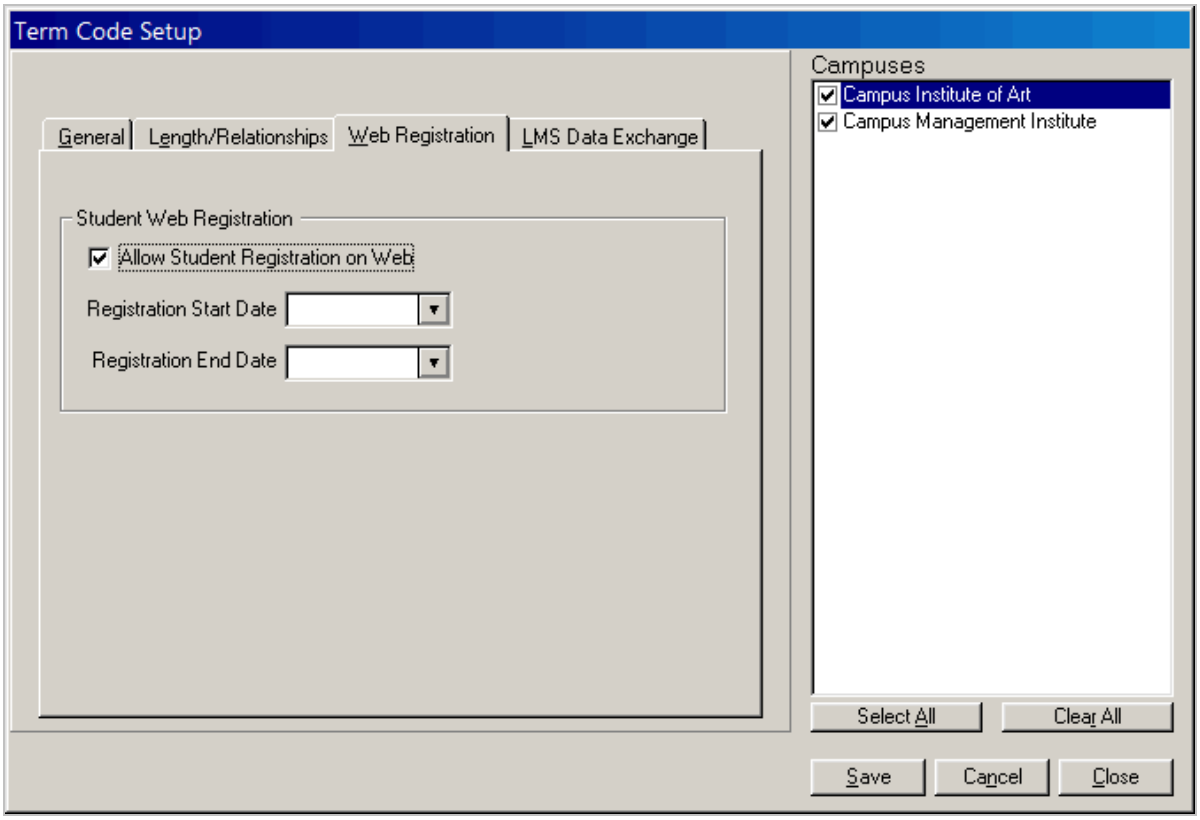
7. Select **SAP Term** when editing or adding a term. The SAP Calculation form lists only terms that have this check box selected and meet other criteria to retrieve the terms, such as campus.
8. If the campus uses Automated SAP Calculation processing, you may override the campus default value for the **Number of Days after term end date to continue calculating SAP** by entering a new value. The new value adjusts the number of days after the end of this term during which Automatic SAP Calculations takes place. If this field is left blank, when Automatic SAP calculations are performed, CampusNexus Student uses the value entered for the campus to determine if processing will occur.
9. Click **Save**.

Once you have defined a term, you can define relationships to other terms by clicking the **Define Relationships** button. For more information, see Term Relationships.

To complete the Web Registration tab:

The Web Registration tab only is displayed if you are using the legacy CampusNexus Student Web Interface and the Use Portal? option is disabled. If your institution permits students to register for classes via the legacy Web Interface, set up the terms that are active for web registration.

1. Click the **Web Registration** tab on the Term Code Setup form.

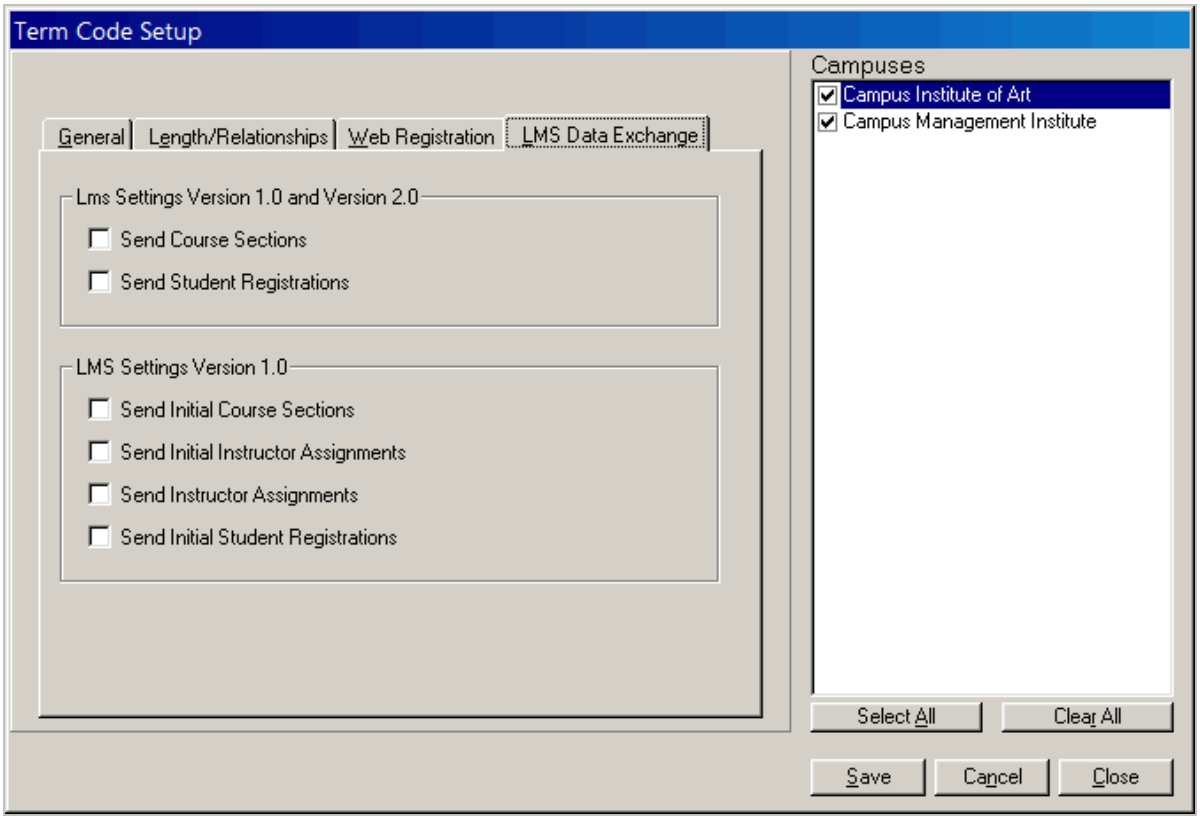


2. Select **Allow Student Registration on Web** to allow students to register online for this term.
3. Select the **Registration Start Date**.

4. Select the **Registration End Date**.
5. Click **Save**.

To complete the LMS Data Exchange tab:

1. Click the **LMS Data Exchange** tab on the Term Code Setup form.



2. Select appropriate LMS Settings to exchange data pertaining to course sections, instructor assignments, and student registrations.
3. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Term Relationships

Term relationships provide ability to schedule a class in more than one term (floating terms) with a single class roster. Term relationships allow multiple terms to be rolled up for scheduling, financial aid, and billing purposes. When a child term is defined as a part of a parent term, multiple start dates can be offered for the child terms while still being able to calculate financial aid and academic information for the parent term.

Note:

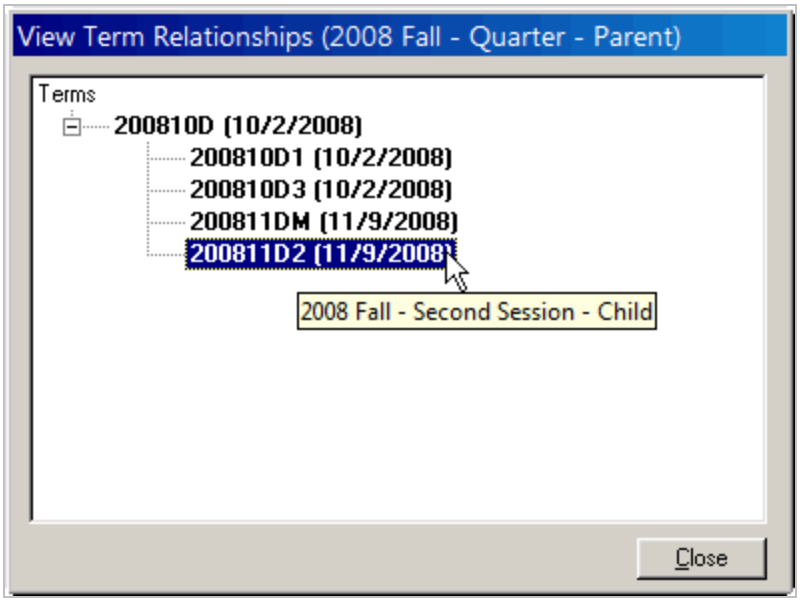
- A parent term can have many child terms.
- Child terms can be parent terms to other terms.
- A child term can have more than one parent term.
- A parent term cannot be selected as a child term for itself.
- A child term cannot be selected as a parent term for itself.

To view term relationships:

1. On the Setup - Academic Records Lists [Term] form, select a term and click **View Relationships**. The View Term Relationships form is displayed.

   The name of each term is displayed (along with its start date) in relation to its parent or children. When you hover over a term name, a pop-up displays the parent-child relationship.

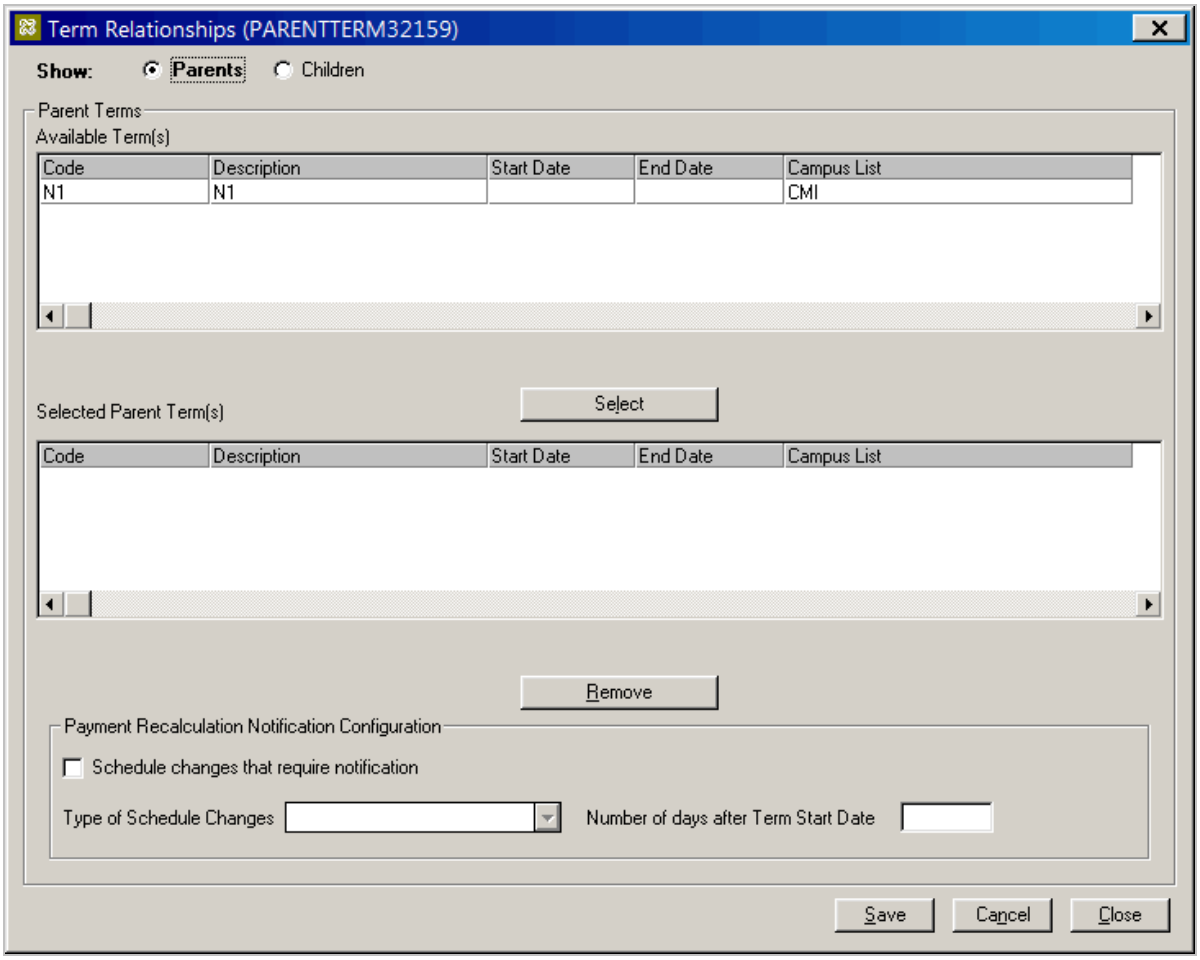
   All terms related to the term selected on the Setup - Academic Records Lists [Term] tab when the View Relationships button was clicked are displayed in the tree, including active, inactive, and reporting only terms.



2. Click the plus (**+**) and (**-**) signs to expand or collapse the tree branches.
3. Click **Close** to close the form.

To define term relationships:

1. On the Length/Relationships tab of the Term Code Setup form, click **Define Relationships**. The Term Relationship form is displayed. The name of the selected is appended to the form title. If any parent or child terms are defined, they are listed on the form. Only available terms (depending on what filters are active at the time), are listed.



2. Select a **Show** option: Parents or Children.
3. To assign a child to the selected term, select a term from the list of available child terms, and click **Select**.

   Note: When editing a term, if students are registered for classes in the selected term, neither child nor parent terms are allowed to be associated with the selected term. A child term cannot be removed from the parent term if students are scheduled for classes in the child term.

   CampusNexus Student checks if relationships exist for the term being modified. Reporting terms do not apply. If non-reporting relationships exist, the following message is displayed: *"This term has term parent or child terms associated with it. Please verify that Financial Aid, Student Accounts, and Registration/Attendance terms exist for each family of terms."*
4. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Payment Recalculation Notification Configuration

The bottom section of the Term Relationship form is used to set up Payment Recalculation Notification -- which is part of the Global Weekly Extract -- to include students who changed their course load in a child term after a defined period of time and whose type of schedule change matches a defined type.

The Payment Recalculation Notification section is used to configure the child terms used for payment recalculation. The section is enabled only if:

- The term is a child term
- The term is used for Global Campus.

- At least one parent term associated with the child term is designated as a Global term.

To configure the payment recalculation notification:

1. Select the **Schedule changes that require notification** check box to enable payment recalculation.
2. Use the **Type of Schedule Changes** options to determine the kinds of schedule changes that will trigger a payment recalculation notification. The options are:
    - Decreases Only (default)
    - Increases Only
    - Increases & Decreases
3. Specify a numeric value in the **Number of days after Term Start Date** field. Payment recalculation notification information is sent when a student's schedule changes and the Global Weekly Extract is performed on or after the specified number of days has elapsed after the term start date.
4. Click **Save**.

While generating the Global Weekly Extract, CampusNexus Student uses the following criteria to determine when the Enrollment Status flag in the extract should be populated with an asterisk (*).

a. Notification of Payment Recalculation must be selected as an option when processing the Weekly Extract.
b. Payment Recalculation Notification must be enabled for at least one child term as shown by the 'Schedule Changes Require Payment Notification' check box having been selected on the 'Define Relationships' form for that term.
c. The configured number of days after the term start date must have elapsed for the child term.
d. The stored scheduled hours for the child term (used in calculating Current Scheduled Hours) must be different than the value last reported for the student for the child term.
e. If the stored scheduled hours (from item d above) are different the difference must be of the Type of Schedule Change (Increases Only, Decreases Only, or Increases & Decreases) defined for that term.

If all criteria are met, the Estimated Enrollment Status field in the Weekly Extract is populated with an asterisk (*).

Pre-Pull/Add-Drop Automation Configuration

This function is used only in conjunction with Pre-Pull/Add Drop Automation.

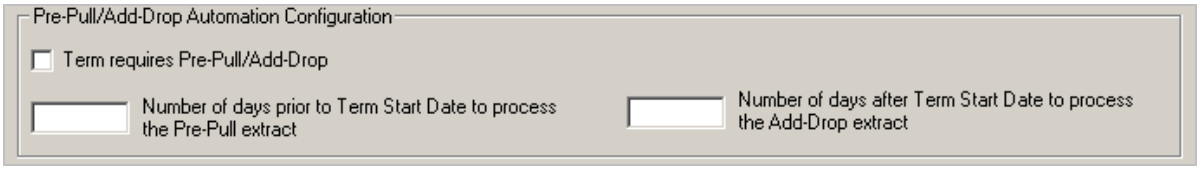
Note: Configuring this option has no effect on CampusNexus Student functions, unless the institution uses Pre-Pull/Add-Drop Automation.

This option is available only if the term meets the following conditions:

- The term is used by a Global Campus.
- The term is not a child term.

To configure Pre-Pull/Add-Drop Automation:

1. Select **Term requires Pre-Pull/Add-Drop** to indicate that this term should be included in the automated Pre-Pull/Add-Drop process.



2. The automated Pre-Pull extract for this term occurs over a time period specified by the institution that runs from a

specified period before the term starts to the Term Start Date. To define the time period before the Term Start Date during which Pre-Pull extracts occurs, enter a number representing the **Number of days prior to Term Start Date to process the Pre-Pull extract**.

3. The Add-Drop extract occurs beginning on the Term Start Date and runs for a specified number of days after the Term Start Date. Define the period after the Term Start Date during which Add-Drop extracts occurs by entering a number representing the **Number of days after Term Start Date to process the Add/Drop extract.**
4. Click **Save**.

Setup - Academic Records Lists [Term Group]

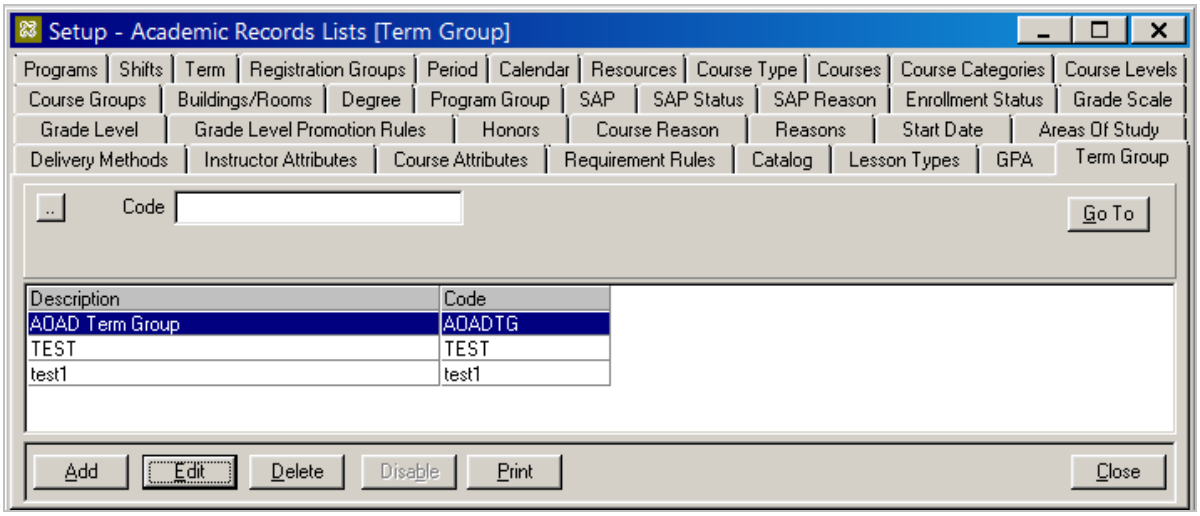
Term groups can be created to connect terms that are not shared. Administrators group a set of registration or attendance terms that can be used to present an overall enrollment status for a student. Term groups allow CampusNexus Student to calculate the aggregation of credits/hours and track enrollment status for students who may be attending multiple institutions concurrently with different academic calendars.

A term can be added to or removed from a group even if registration has already occurred in the term. Administrators can see when the overall enrollment status for a student is recalculated including any changes that are made to the term groups.

Note: A term can be placed in one term group only.

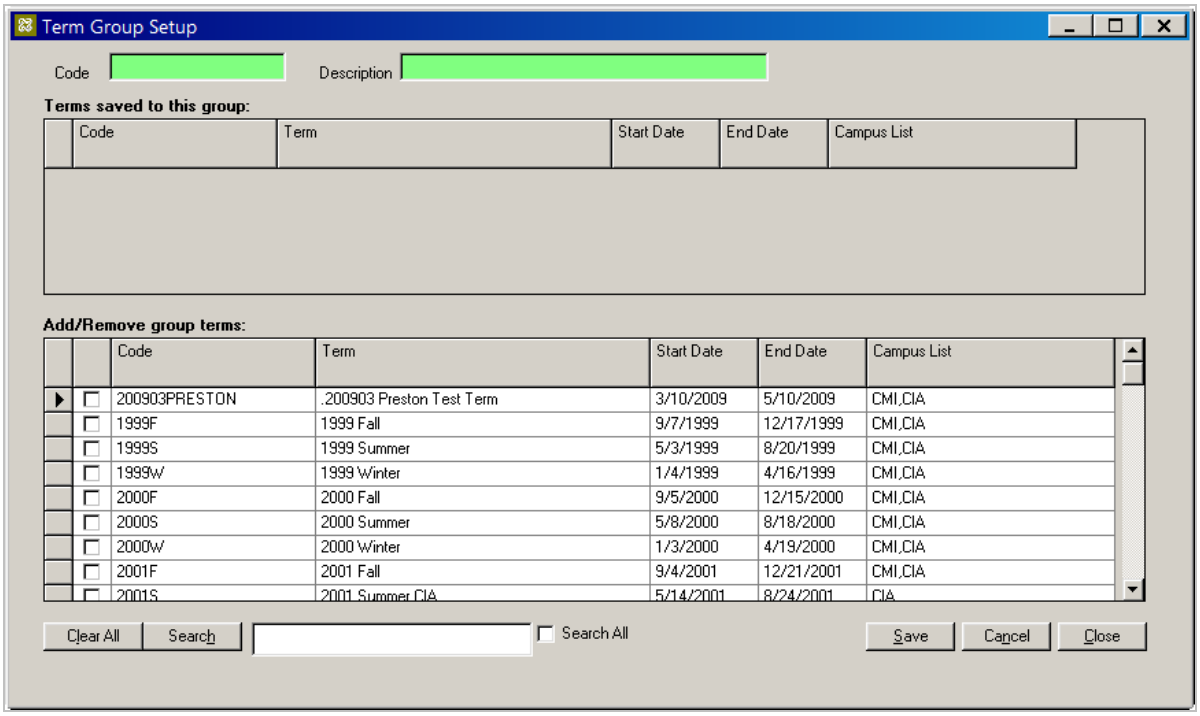
To add or edit a list of term group codes:

1. Navigate to **Lists** > **Academic Records**. The Setup - Academic Records Lists form is displayed.
2. Select the applicable **tab**, or click the **Go To** button, click and select **Term Group**.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Click **Add**, or select a record and click **Edit**. The Term Group Setup form is displayed.

   The top grid consists of terms that have been saved to the term group. The bottom grid consists of terms that are available to be added or removed from the term group. Since terms can cross campuses, the Campus List is included to allow users to differentiate between terms that may have been named the same.

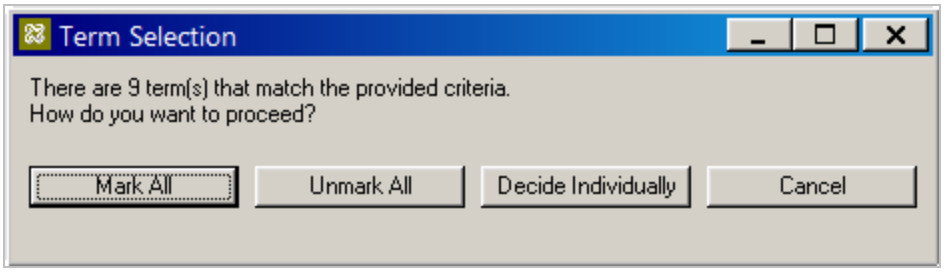


5. Specify a unique **Code**.

   Note: Terms available for selection must be Parent or Standard terms (terms with no relationships). Both types of terms should not have "reporting only" set as their term usage. A term group can mix terms from different campuses. You cannot select a term that is already associated with another term group.

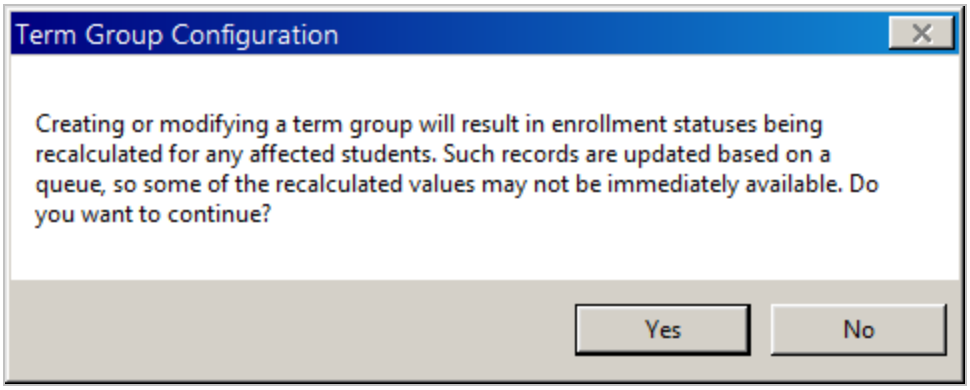
6. Enter a **Description**.

7. Select **Terms** in the bottom grid. Scroll through the list or click **Search** to find applicable terms. The search result provides the option to select all terms found or to decide individually.



8. Click **Save**. Any changes made to a term group cause a recalculation of the overall enrollment status for students.

9. The Term Group Configuration message is displayed. Click **Yes** to proceed.



10. Click **Delete** to remove a term group. When you delete a term group, a message indicates if there are associated terms.
11. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Note: Calculated enrollment statuses based on term groups are viewable at the enrollment and term levels. Navigate to View > Academic Records > Enrollment for more information.

Lists > Career Services

When you navigate to Lists > Career Services, the Setup - Career Services form is displayed. Add, edit, delete, enable, disable, and print Career Services lists from the following tabs:

- Career Fields
- Certifications
- Contact Type
- Corporate
- Employer Contact Attributes
- How Placed
- Industry
- Job Benefits
- Job Category
- Job Source
- Job Title
- Job Type
- Location
- Reasons
- Salary Type
- Skills

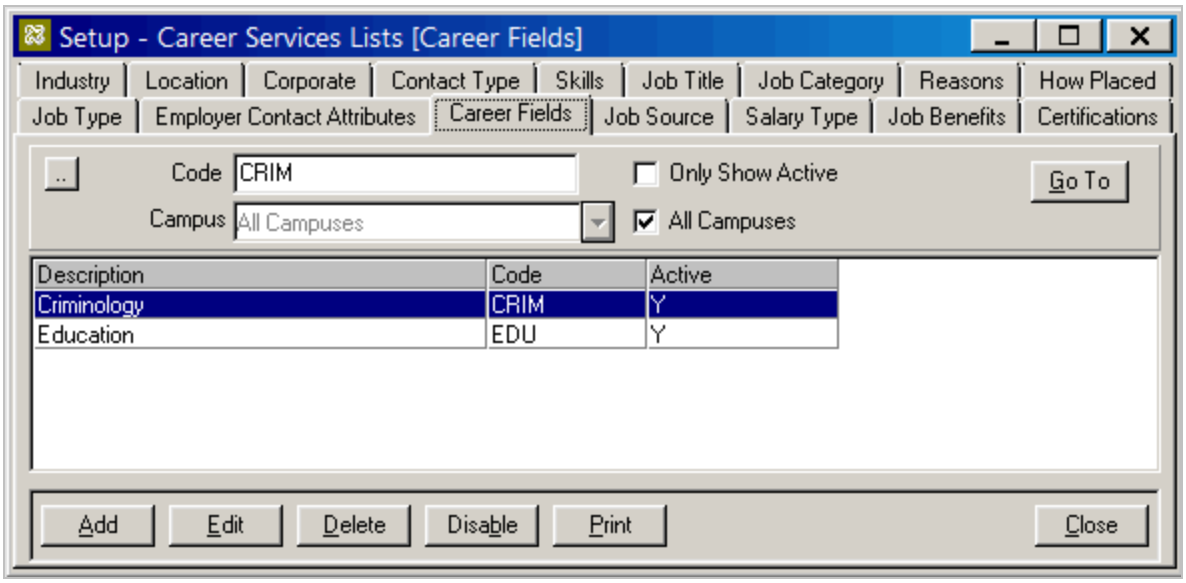
See Maintaining Lists for instructions on adding, editing, deleting, disabling, enabling, and printing lists.

Setup - Career Services Lists [Career Fields]

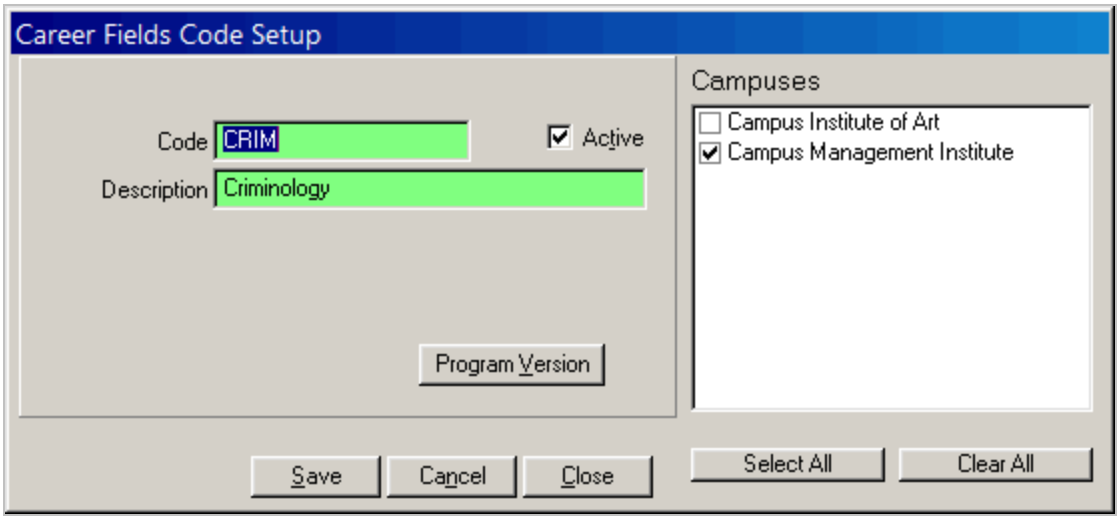
You can define codes to for different career fields.

To add or edit a list of career field codes:

1. Navigate to **Lists** > **Career Services**. The Setup - Career Services Lists form is displayed.
2. Select the **Career Fields** tab.



3. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Career Fields Code Setup form is displayed.



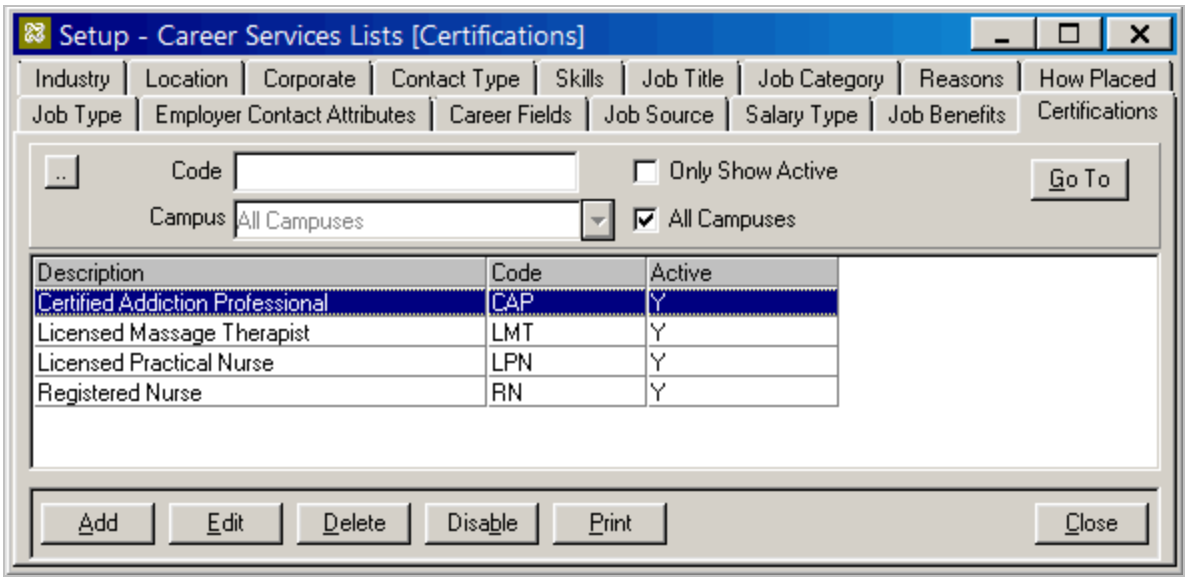
7. Specify a unique **Code**.
8. Enter a **Description**.
9. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
10. Select one or more **Campuses**.
11. Click **Program Version** to associate program versions with this career field. For more information, see Associate Job Skills with Program Versions.
12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Career Services Lists [Certifications]

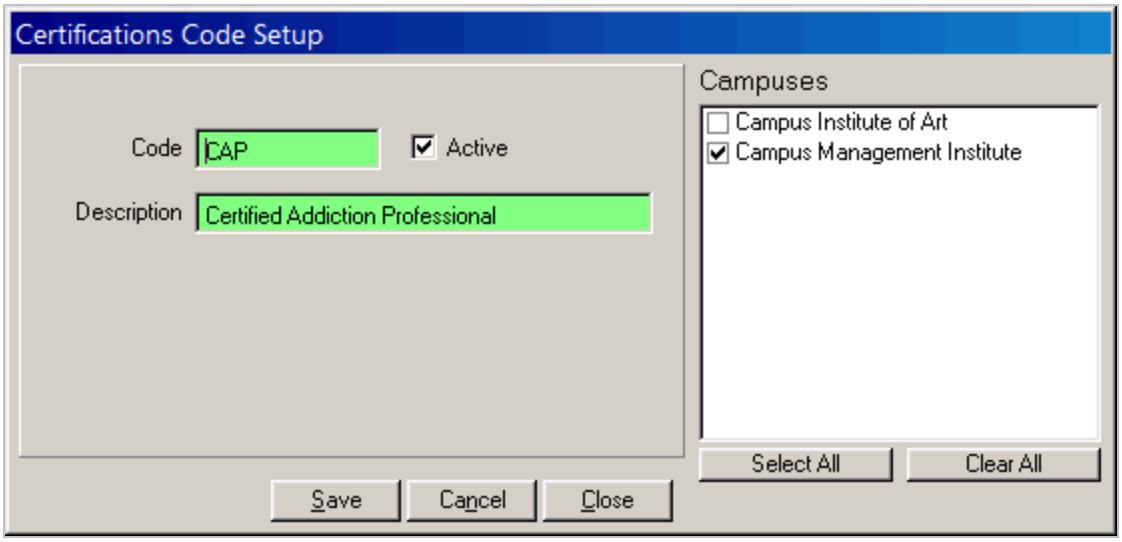
Certifications codes are linked to students who have achieved special certifications or licensing.

To add or edit a list of certification codes:

1. Navigate to **Lists** > **Career Services**. The Setup - Career Services Lists form is displayed.
2. Select the **Certifications** tab.



3. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Certification Code Setup form is displayed.



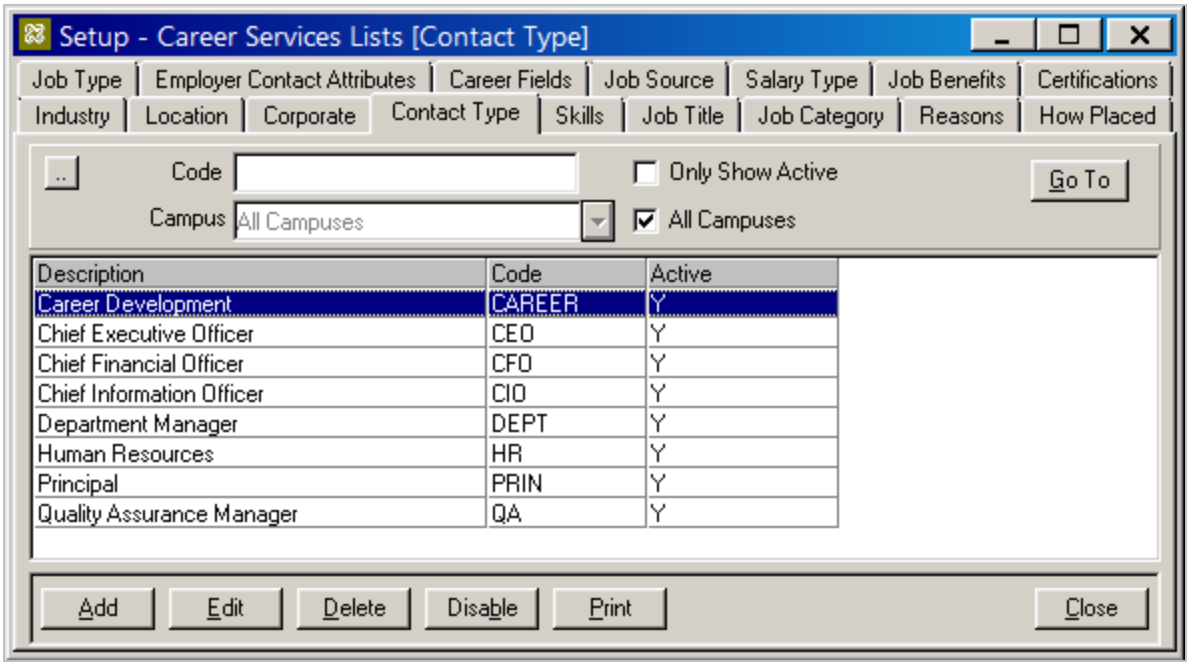
7. Specify a unique **Code**.
8. Enter a **Description**.
9. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
10. Select one or more **Campuses**.
11. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Career Services Lists [Contact Type]

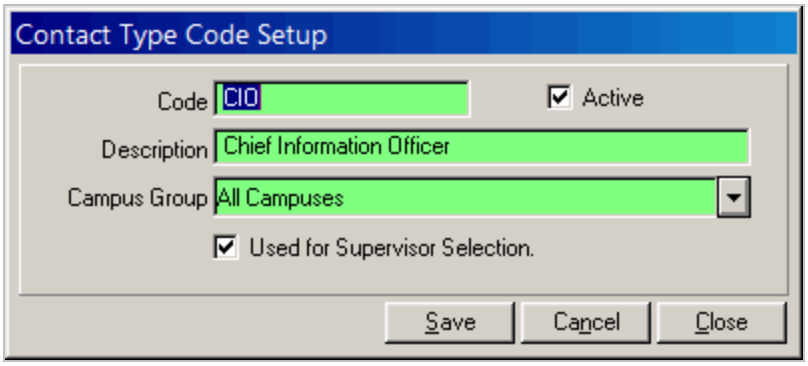
Contact types are used to categorize the contacts within an employer's organization. The Contact Type code is linked to individual contact records which are, in turn, linked to employer records.

To add or edit a list of contact type codes:

1. Navigate to **Lists** > **Career Services**. The Setup - Career Services Lists form is displayed.
2. Select the **Contact Type** tab.



3. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Contact Type Code Setup form is displayed.



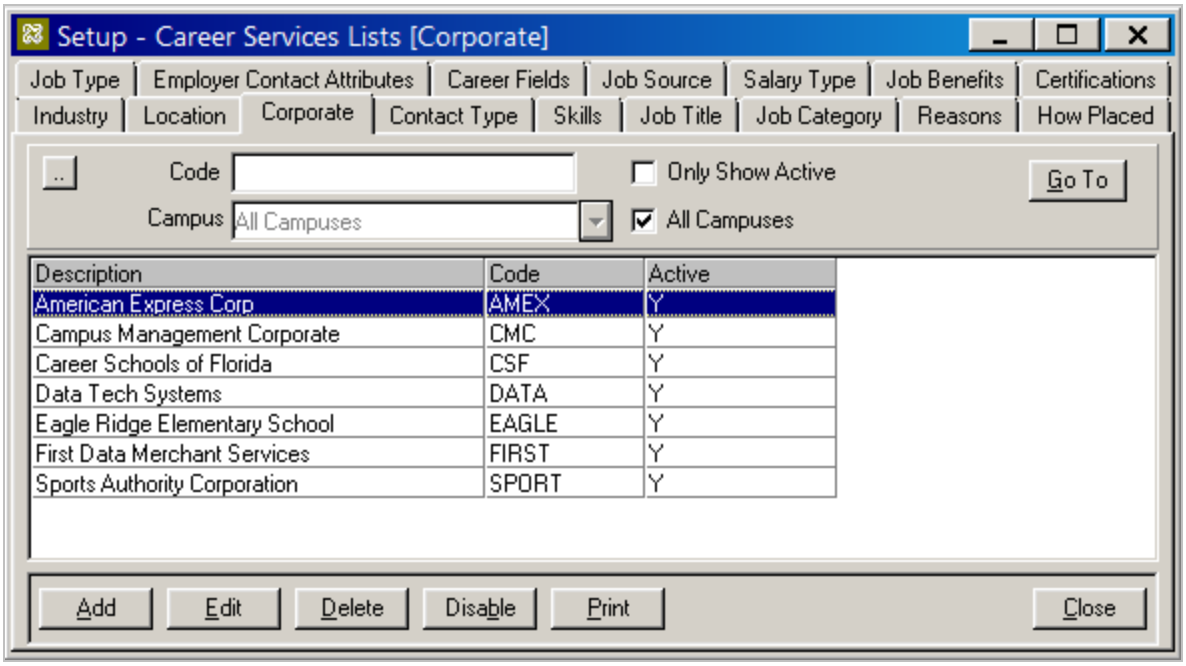
7. Specify a unique **Code**.
8. Enter a **Description**.
9. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
10. Select the **Campus Group** to which the Contact Type code applies.
11. Select the **Used for Supervisor Selection** check box if this Contact Type is used for supervisor selection.
12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Career Services Lists [Corporate]

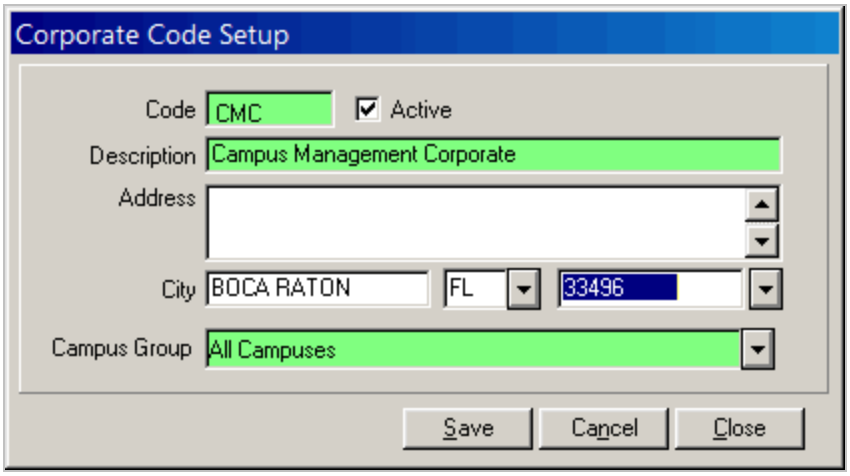
Entries on the Corporate list represent the corporate headquarters or consolidation point for employers that have more than one branch office or location. You can relate all the branch locations to the main headquarters for reporting and analyzing Career Services at the enterprise level.

To add or edit a list of corporate codes:

1. Navigate to **Lists** > **Career Services**. The Setup - Career Services Lists form is displayed.
2. Select the **Corporate** tab.



3. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Corporate Code Setup form is displayed.



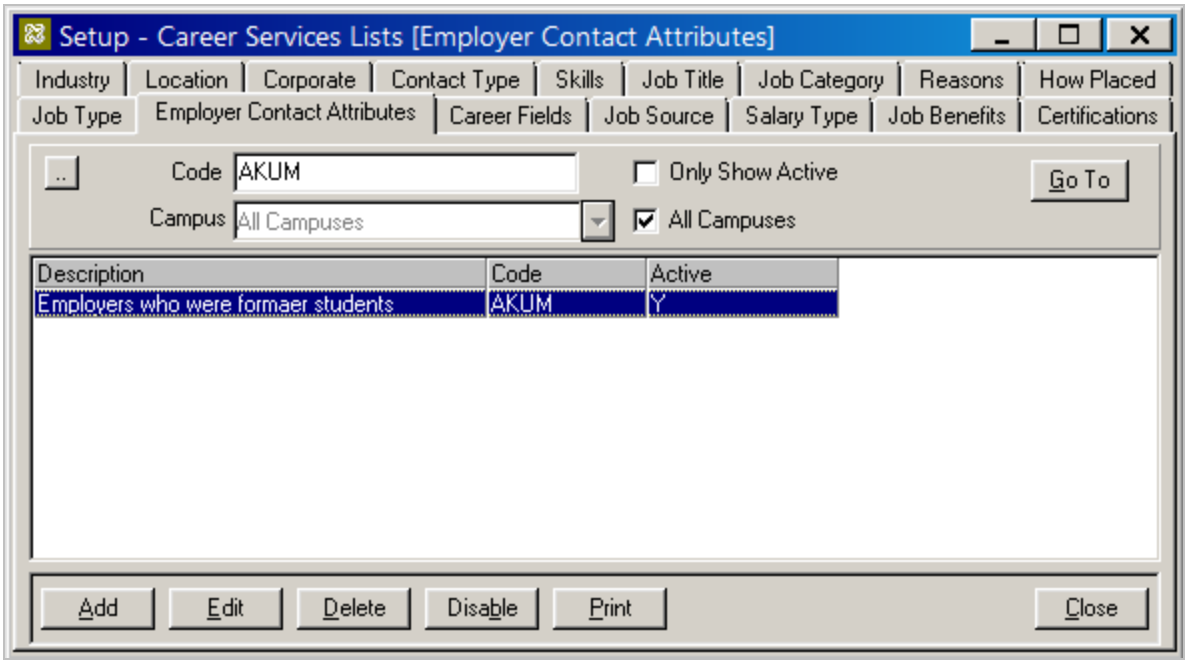
7. Specify a unique **Code**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Enter a **Description**.
10. *Optional*: Specify an **Address**, **City**, **State**, and **ZIP** code.
11. Select the **Campus Group** to which the corporate record applies.
12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Career Services Lists [Employer Contact Attributes]

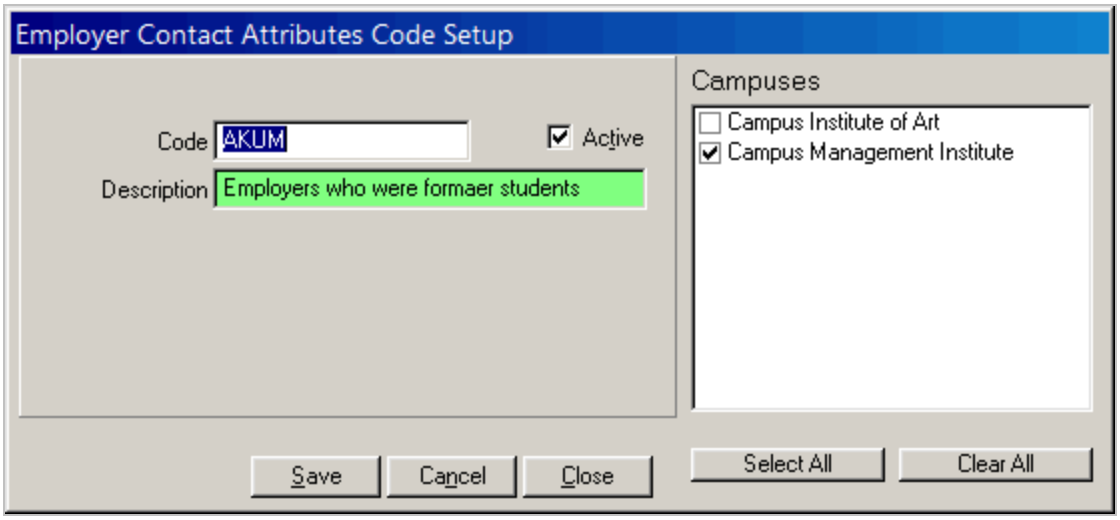
Employer Contact Attributes are used to group characteristics for employer contacts.

To add or edit a list of employer contact attribute codes:

1. Navigate to **Lists** > **Career Services**. The Setup - Career Services Lists form is displayed.
2. Select the **Employer Contact Attributes** tab.



3. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Employer Contact Attribute Code Setup form is displayed.



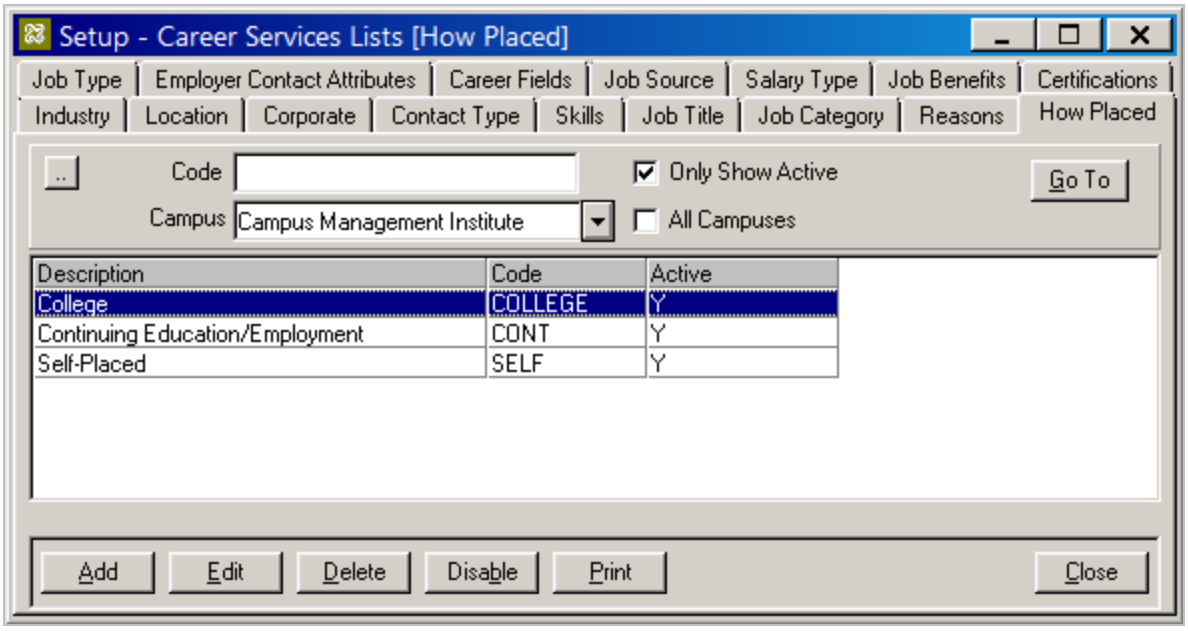
7. Specify a unique **Code**.
8. Enter a **Description**.
9. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
10. Select one or more **Campuses**.
11. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Career Services Lists [How Placed]

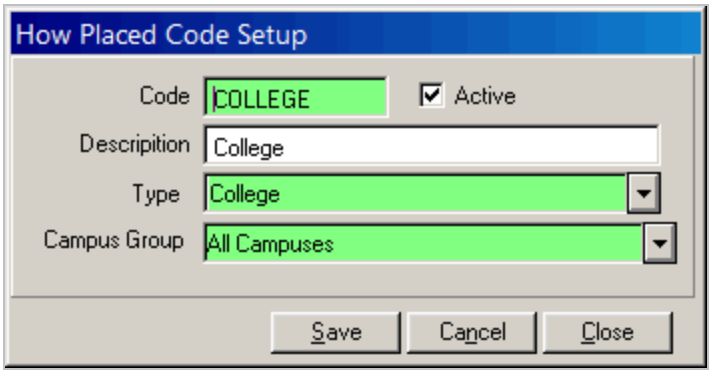
You can add three types of user-defined how-placed statuses. The types are system codes that cannot be modified.

To add or edit a list of how placed codes:

1. Navigate to **Lists** > **Career Services**. The Setup - Career Services Lists form is displayed.
2. Select the **How Placed** tab.



3. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The How Placed Code Setup form is displayed.



7. Specify a unique **Code**.

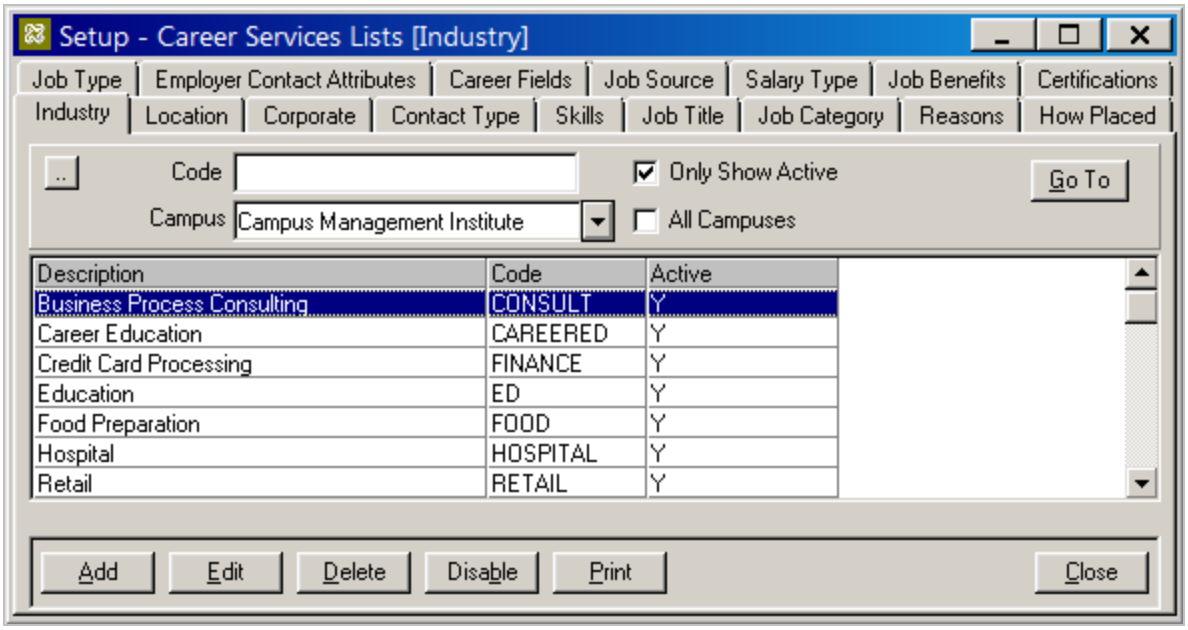
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Enter a **Description**.
10. Select a **Type**. The Type list provided by CampusNexus Student includes:
    - C - College
    - S - Self
    - O - Continuing Employment/Education.
11. Select the **Campus Group** to which the How Placed Code applies.
12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Career Services Lists [Industry]

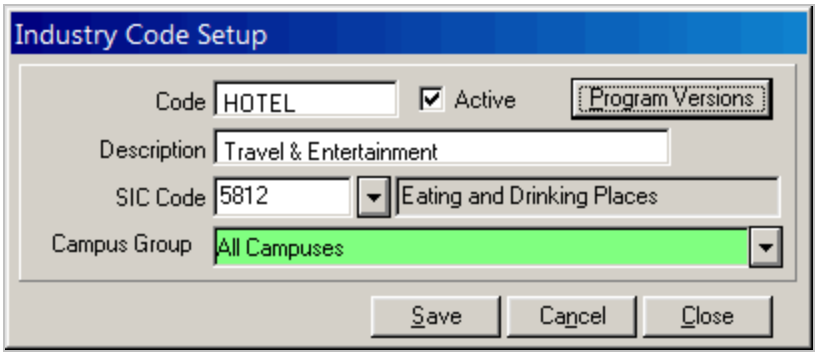
The industry code list describes sectors of the economy in which your students is placed. You can associate industry codes with Department of Labor (OSHA) Standard Industrial Classification (SIC) codes. The industry codes are linked to employers and program versions.

To add or edit a list of industry codes:

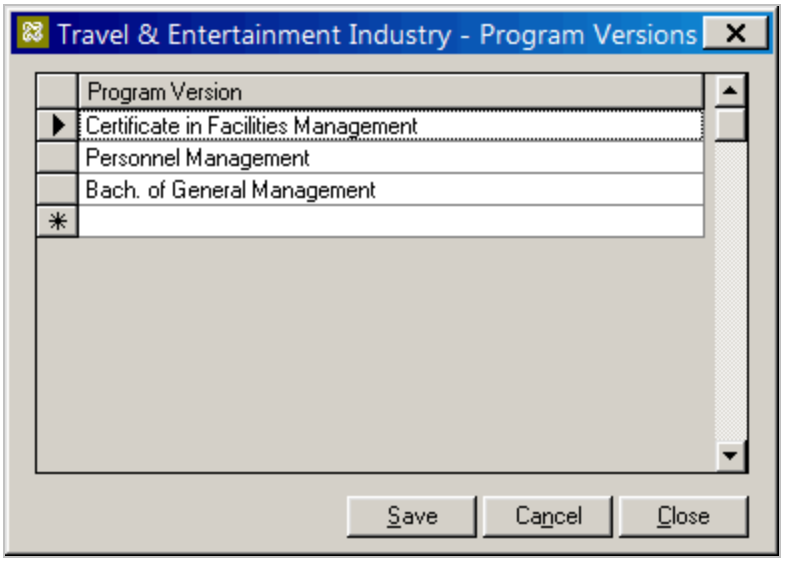
1. Navigate to **Lists** > **Career Services**. The Setup - Career Services Lists form is displayed.
2. Select the **Industry** tab.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Industry Code Setup form is displayed.



7. Specify a unique **Code**.
8. Enter a **Description**.
9. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
10. *Optional*: Select a **SIC Code** that applies to this industry. The description of the selected code is displayed.
11. Select the **Campus Group** to which the Industry code applies.
12. If you are entering a new industry code, click **Save**. A new code must be saved before you can select the related Program Versions.
13. Click the **Program Versions** button. The subject Program Versions form is displayed.



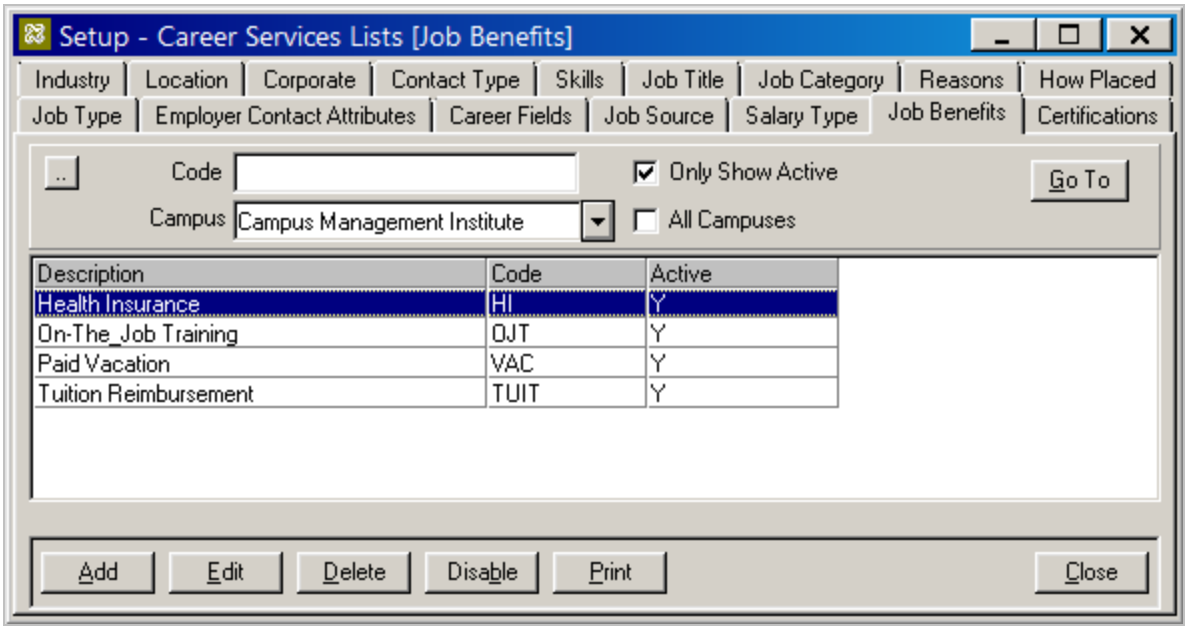
14. To add a program version, click the blank line next to the asterisk (*), click , and select a program version.
15. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. You are returned to the Industry Code Setup form.
16. Click **Close** to close the form.

Setup - Career Services Lists [Job Benefits]

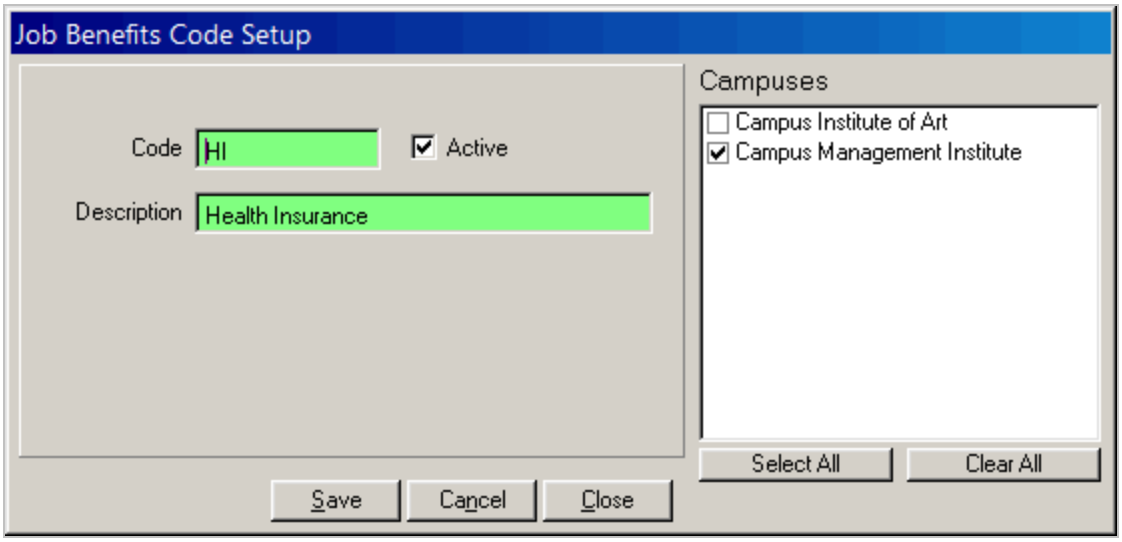
Job Benefits are used to categorize the employee benefits that are provided with some jobs.

To add or edit a list of job benefit codes:

1. Navigate to **Lists** > **Career Services**. The Setup - Career Services Lists form is displayed.
2. Select the **Job Benefits** tab.



3. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Job Benefits Code Setup form is displayed.



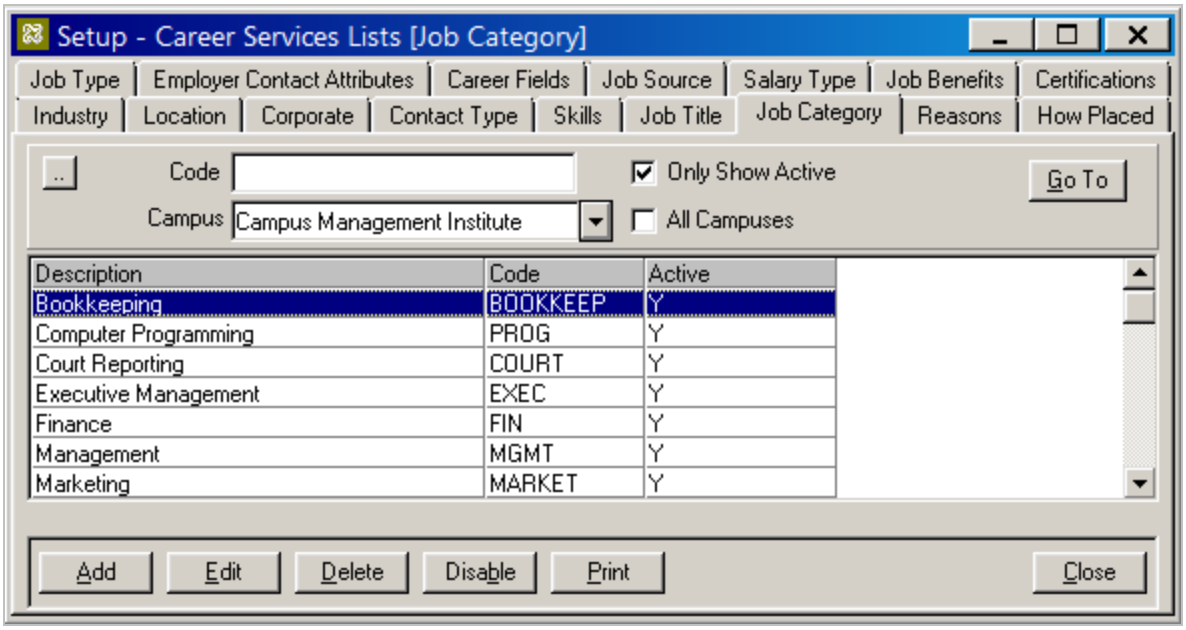
7. Specify a unique **Code**.
8. Enter a **Description**.
9. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
10. Select one or more **Campuses**.
11. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Career Services Lists [Job Category]

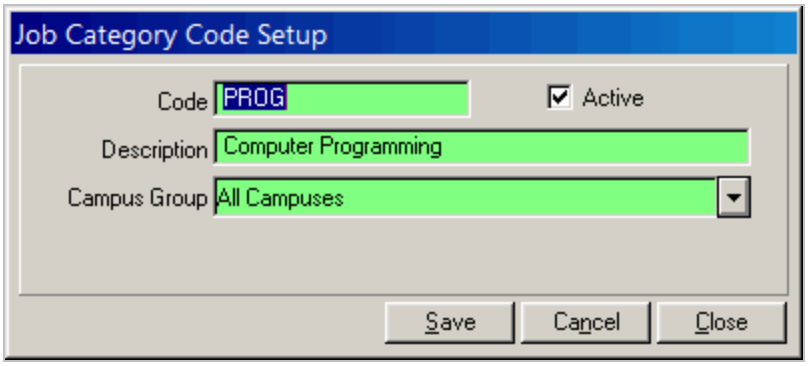
Job categories are used to group job titles that have common characteristics such as executive, accounting, programming, and so on. Job titles are generally provided by employers when jobs are offered.

To add or edit a list of job category codes:

1. Navigate to **Lists** > **Career Services**. The Setup - Career Services Lists form is displayed.
2. Select the **Job Category** tab.



3. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Job Category Code Setup form is displayed.



7. Specify a unique **Code**.
8. Enter a **Description**.
9. Select or clear the **Active** check box to designate the record as active or inactive, respectively.

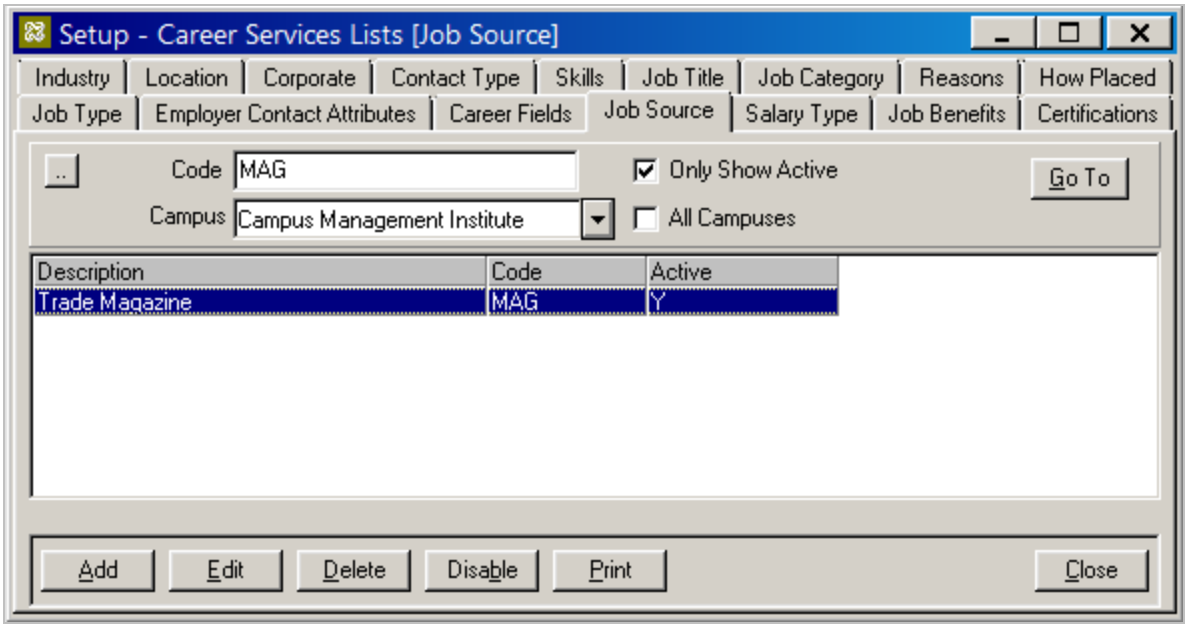
   Note: When you click the **Delete** or **Disable** button or clear the **Active** check box, CampusNexus Student checks for Job Titles associated with the Job Category. If there are Job Titles associated with a Job Category that you are trying to deactivate, a warning message is displayed. CampusNexus Student provides a list of active Job Categories to associate with the Job Titles that were previously assigned to the Job Category that you are attempting to remove or deactivate.
10. Select the **Campus Group** to which the Job Category applies.
11. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Career Services Lists [Job Source]

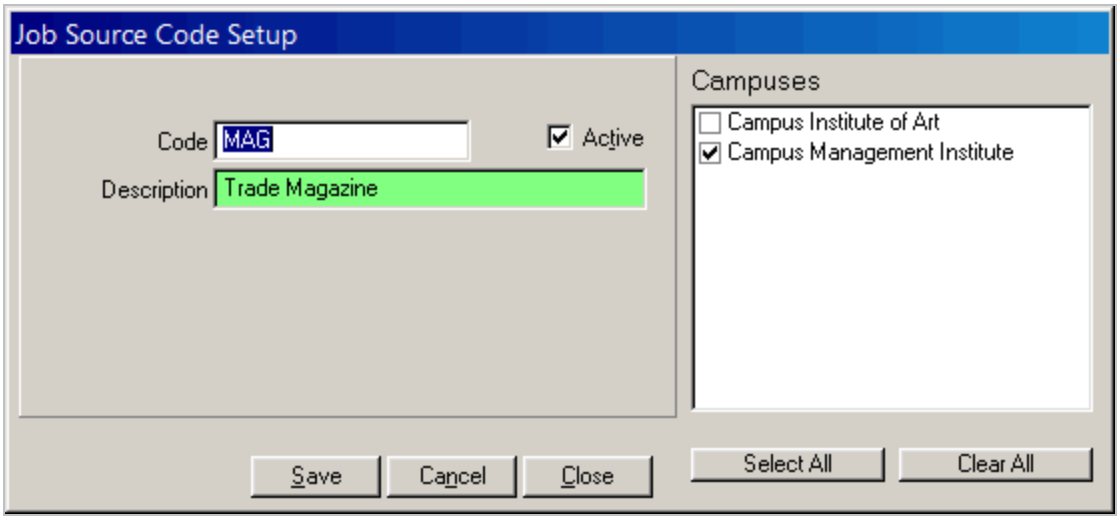
Use the Job Source tab of the Setup - Career Services Lists form to specify codes for job sources (e.g., newspaper, radio, web-sites, mailings). The Job Source field is saved for all new jobs and used to track where the job opening was discovered. Users enter job source information as part of the Placement Wizard for jobs that are not selected from an existing job opening.

To add or edit a list of job source codes:

1. Navigate to **Lists** > **Career Services**. The Setup - Career Services Lists form is displayed.
2. Select the **Job Source** tab.



3. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Job Source Code Setup form is displayed.



7. Specify a unique **Code**.
8. Enter a **Description**.
9. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
10. Select one or more **Campuses**.
11. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

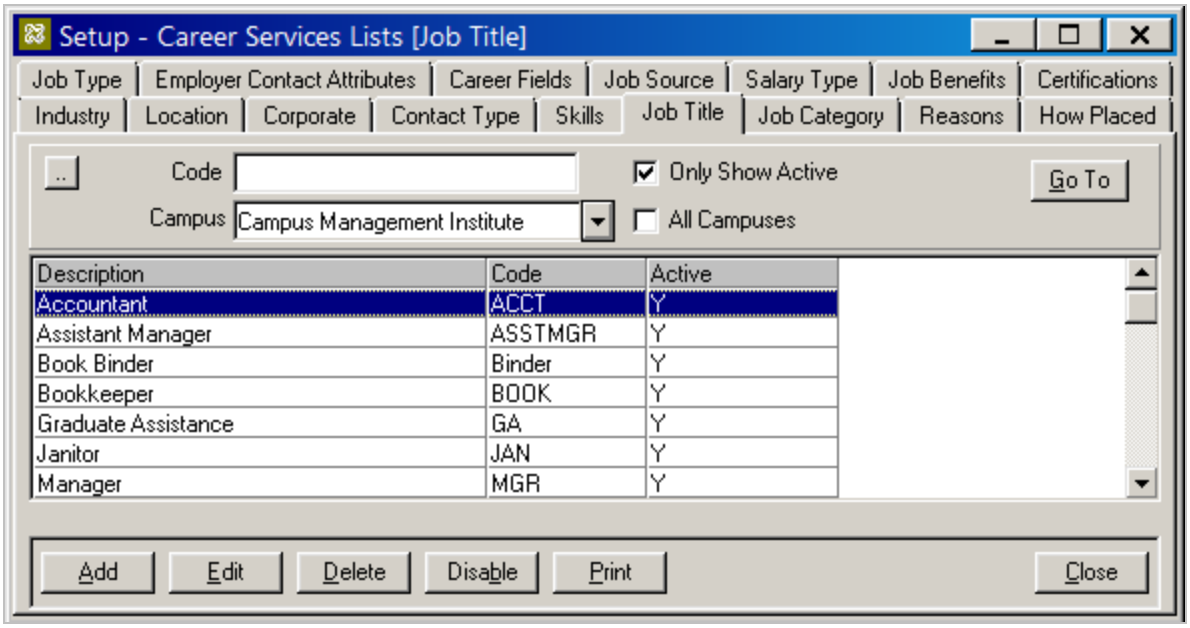
Setup - Career Services Lists [Job Title]

The Job Title list is used to group available jobs and jobs in which students have been placed according to the titles of the positions. Job titles are generally provided by the employers when jobs are offered. A Job Title is further related to a Job Category. Job categories are groups of Job Titles that have common characteristics such as executive, accounting, programming, and so on.

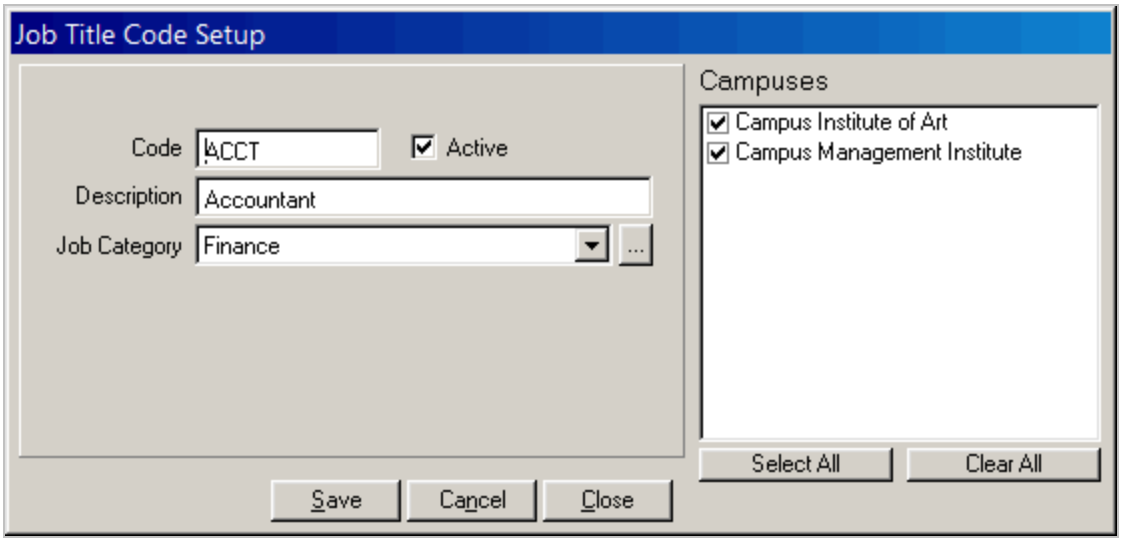
Note: The job category to which a new job title is related must be set up before adding the job tile.

To add or edit a list of job title codes:

1. Navigate to **Lists** > **Career Services**. The Setup - Career Services Lists form is displayed.
2. Select the **Job Title** tab.



3. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Job Title Code Setup form is displayed.



7. Specify a unique **Code**.
8. Enter a **Description**.
9. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
10. Select the **Job Category** to which the Job Title is related. Click ... to select multiple Job Categories.

    Note: You cannot select a Job Category associated with a campus if you do not have permissions for that campus.
11. Select one or more **Campuses**.
12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

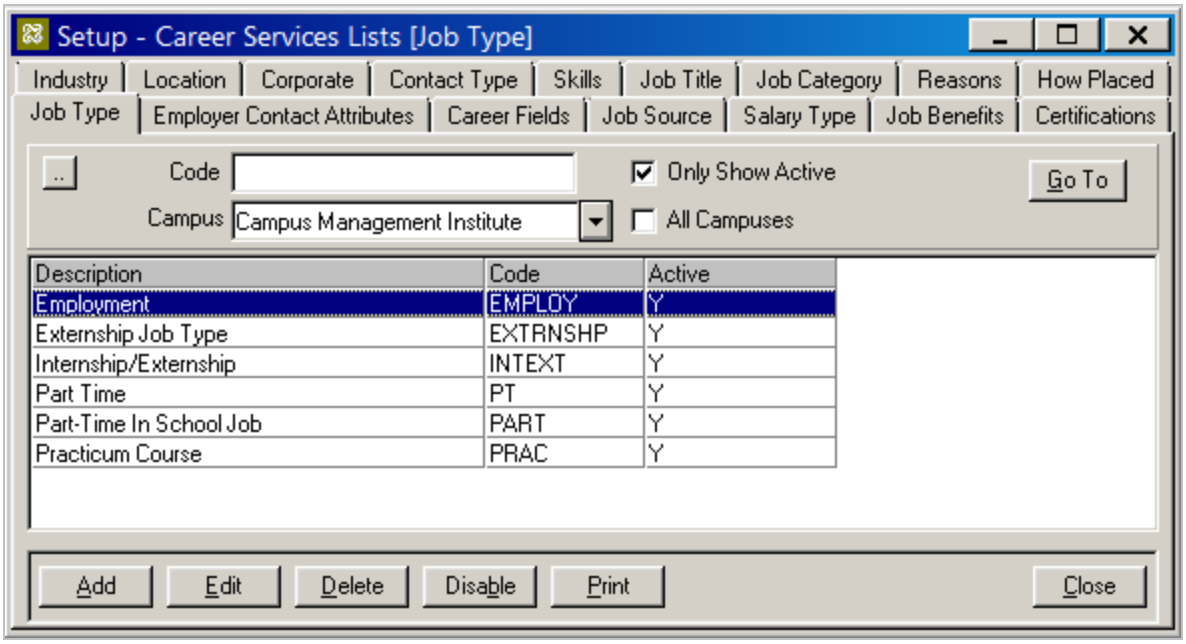
Setup - Career Services Lists [Job Type]

You can add three types of user-defined job type codes. The three types (E - Employment, I - Internship/Externship, and S - In School) are system codes that cannot be modified.

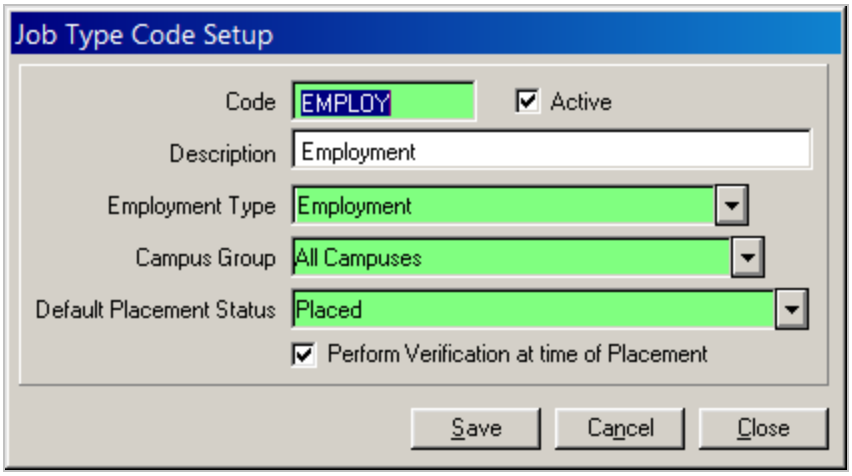
Note: You can designate a user-defined job type as In School to specify that the job type is not a placement for a graduating student.

To add or edit a list of job type codes:

1. Navigate to **Lists** > **Career Services**. The Setup - Career Services Lists form is displayed.
2. Select the **Job Type** tab.



3. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Job Type Code Setup form is displayed.



7. Specify a unique **Code**.
8. Enter a **Description**.
9. Select an **Employment Type**. The default types are:

    - E - Employment
    - I - Internship/Externship
    - S - In School.

    You must be authorized to enter Job Type descriptions, codes, and active. See User Info Career Services sub-tab to set up permissions for individual staff members or staff groups.
10. Select a **Campus Group** to which the Job Type applies.
11. Select a **Default Placement Status** to be used as the default.
12. Select the **Perform Verification at time of Placement** check box to cause the verification form to be displayed as part of the Placement Wizard.

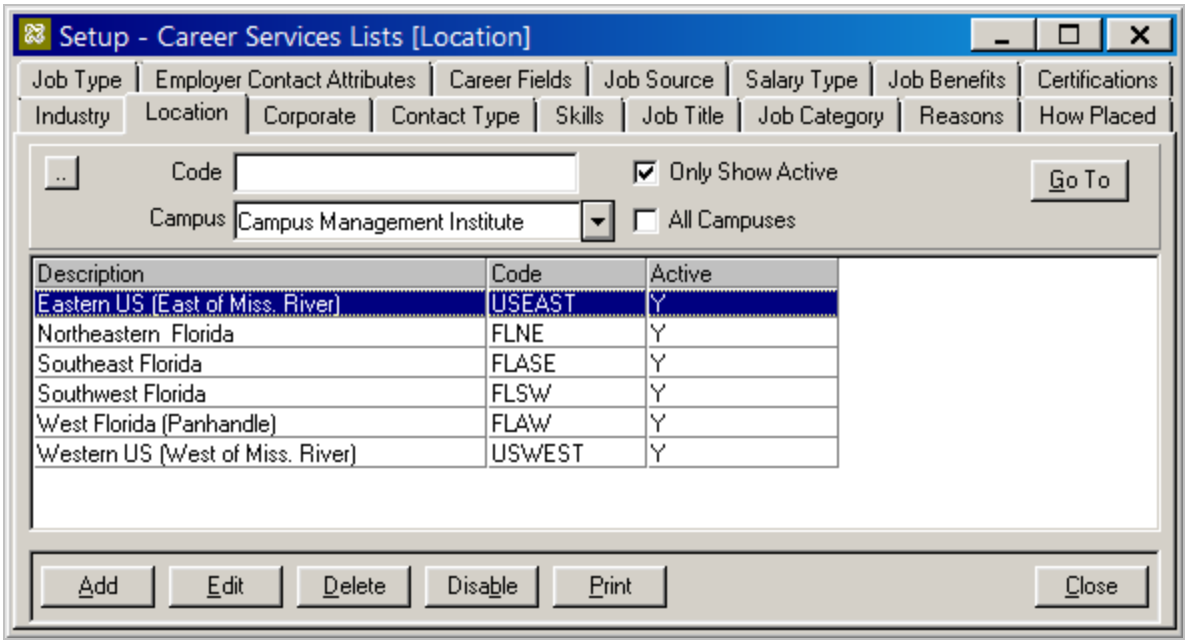
    Note: Edit the Job type and select "Perform Verification at the time of Placement". When this check box is selected, you can add placement verification data through the placement wizard. To capture and store multiple verification records associated with a single placement record, navigate to View > Career Services > Placements.
13. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Career Services Lists [Location]

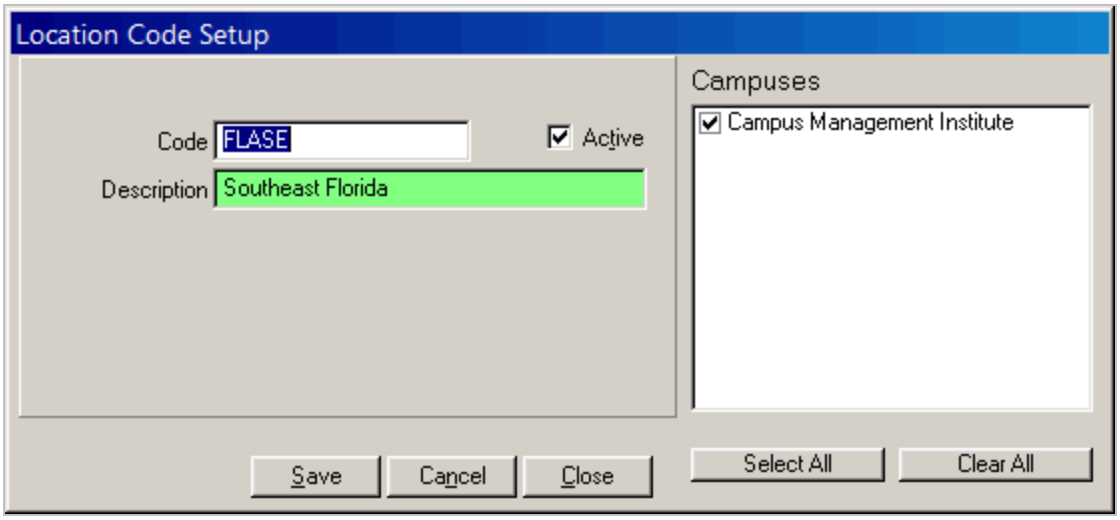
Location codes identify the areas in which employers and jobs are located. Location codes are linked to employers when their records are entered. If an employer has multiple job locations, set up a separate employer record for each location.

To add or edit a list of location codes:

1. Navigate to **Lists** > **Career Services**. The Setup - Career Services Lists form is displayed.
2. Select the **Location** tab.



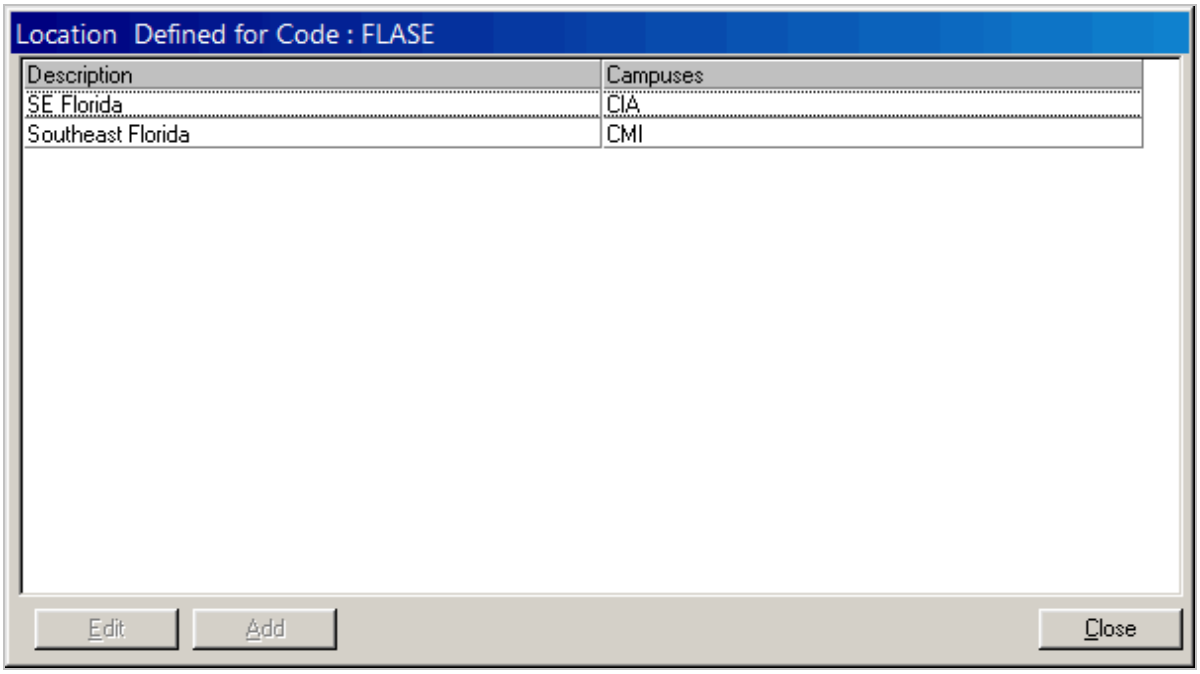
3. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Location Code Setup form is displayed.



7. Specify a unique **Code**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Enter a **Description**.
10. Select one or more **Campuses**.
11. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Duplicate Codes

If you add a code to the database that duplicates a code already on file, the Location Defined for Code form is displayed. It lists all location records that have the same code. The rows on the grid include the location description and the campuses to which the code is assigned.



Select a row and click **Edit** to change the record.

If you do not see a row for the campus you want to work with, click **Add** to return to the Location Code Setup form.

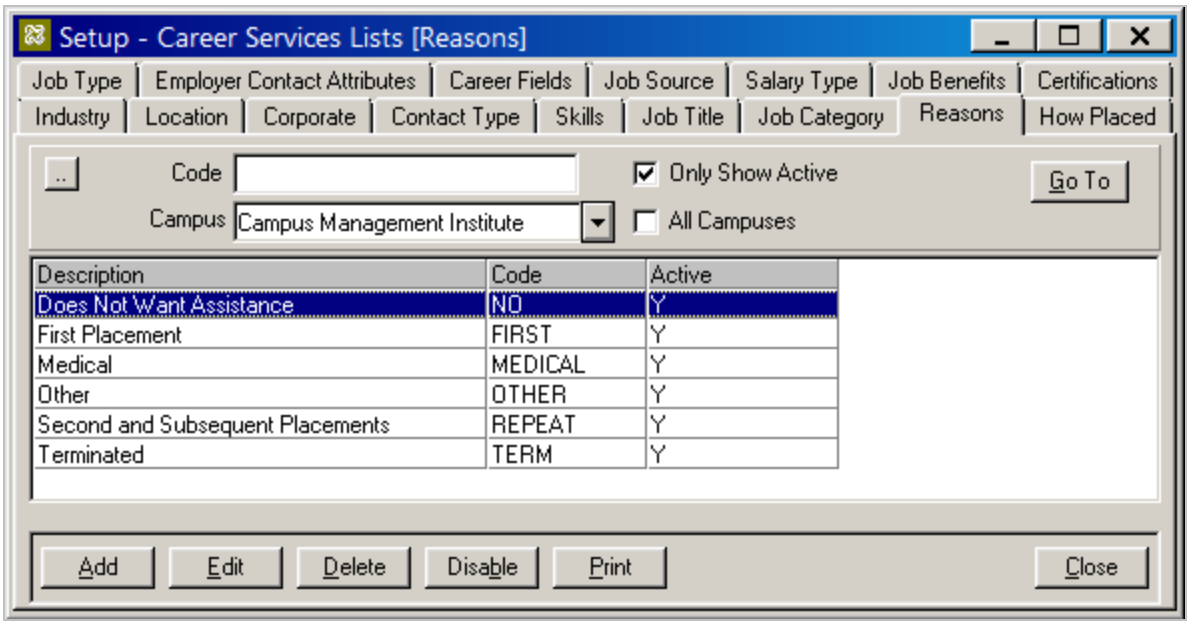
The **Add** button is not available if all campuses to which you have access already have the code. When you go back to the Add form, all campuses that already have the code assigned are eliminated from the list of campuses. You can assign the duplicate code to any or all remaining campuses.

Setup - Career Services Lists [Reasons]

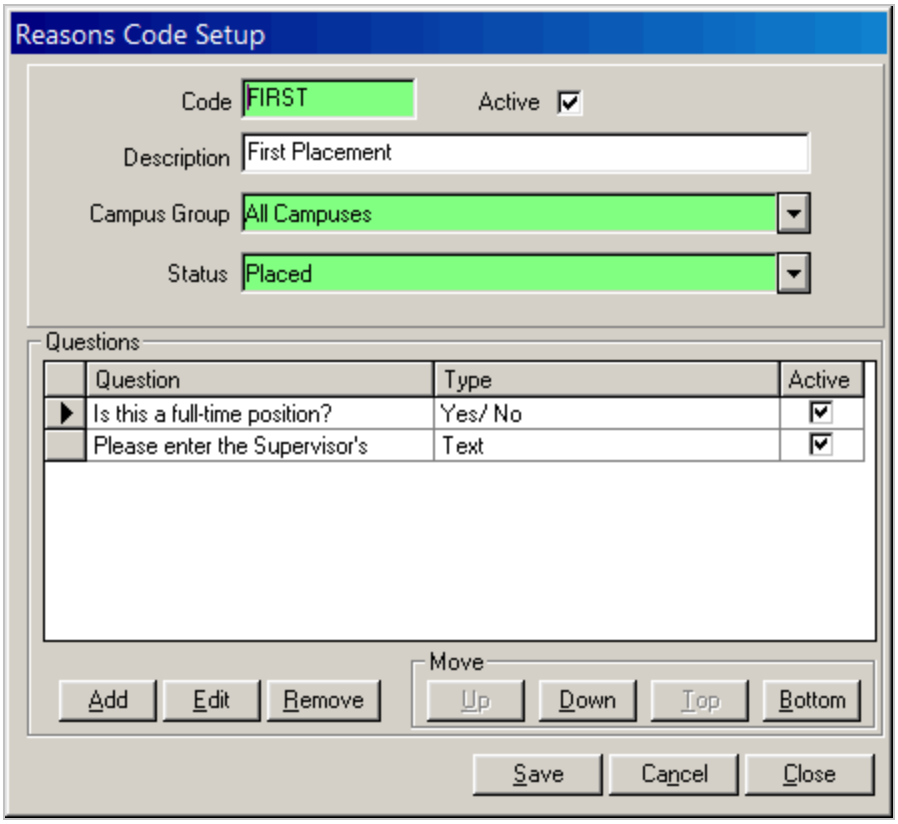
The campus-specific Reasons code list enables you to attach a reason to each change of placement status for each student at each campus. A Reason code can be included when making an individual or batch status change. By relating a predefined Reason code to a student status change, you can classify the changes into groups and analyze them with a report. Reason codes cannot be deleted if they are used in the Student Placement table; however, you can change the code to inactive so that it cannot be used in the future.

To add or edit a list of reason codes:

1. Navigate to **Lists** > **Career Services**. The Setup - Career Services Lists form is displayed.
2. Select the **Reasons** tab.



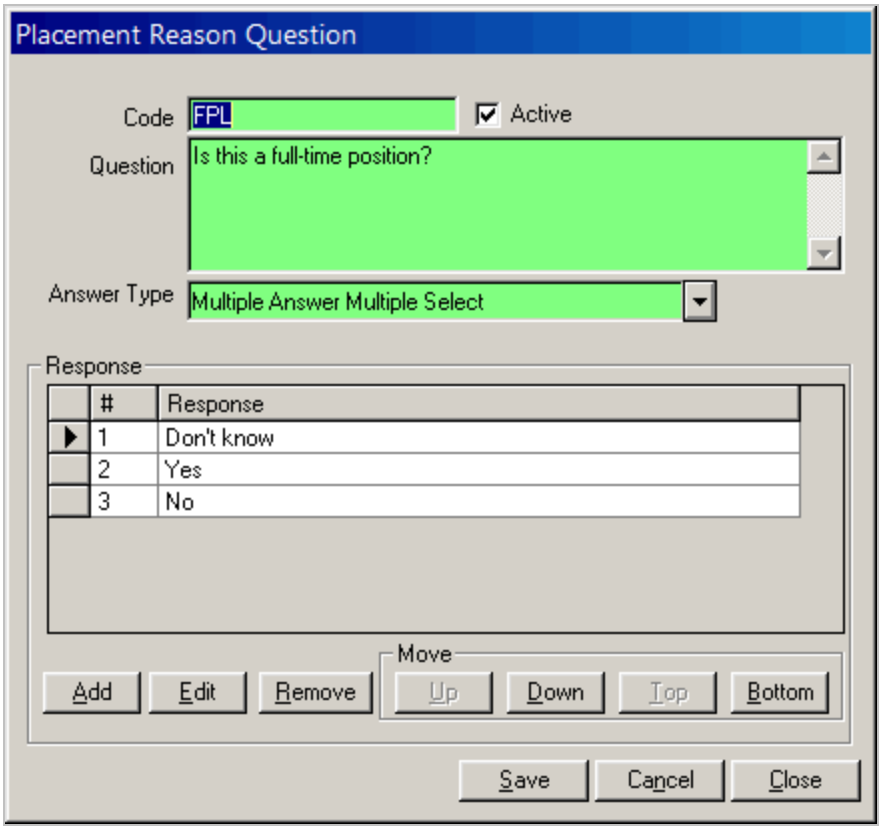
3. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Reasons Code Setup form is displayed.



7. Specify a unique **Code**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Enter a **Description**.
10. Select a **Campus Group** to which the Reason Code applies.
11. Select a **Status**. The list values are obtained from status codes of the Graduate - Placement category. Your can add statuses to the list under Setup > Status Codes. The following is a sample list of placement status codes:

Status	System Status	Category
Military	Not Available	Graduate - Placement
Ineligible	Not Available	Graduate - Placement
Not Available	Not Available	Graduate - Placement
Currently Attending	Currently Placed	Graduate - Placement
Previously Placed	Currently Placed	Graduate - Placement
Does Not Want Assistance	Not Available	Graduate - Placement
Not Yet Placed	Not Yet Placed	Graduate - Placement

12. In the Questions grid: Click **Add**, or select a record and click **Edit**. The Placement Reason Question form is displayed.



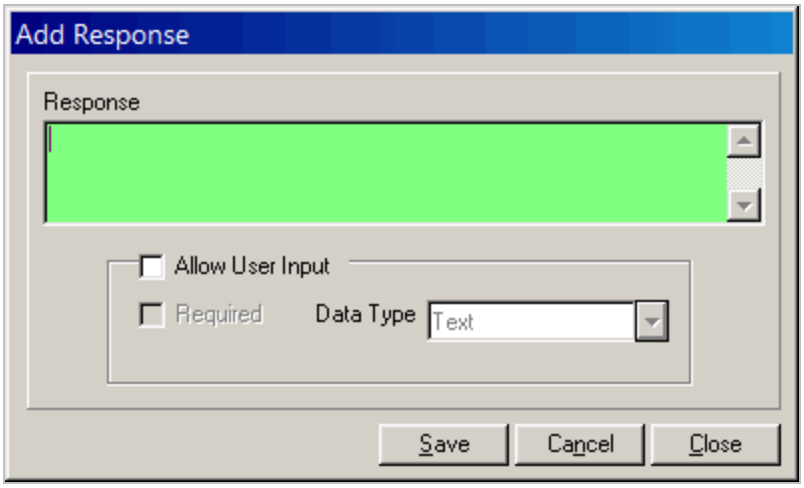
13. Specify a unique **Code**.
14. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
15. Enter the **Question** as you want it to appear to the user when the reason is chosen.
16. Select the **Answer Type**. The options are:

    - Multiple Answer Multi Select (M)
    - Multiple Answer Single Select (S)
    - Text (X)
    - True/False (T)
    - Yes/No (Y)

    For Text, True/False, and Yes/No questions, the Response frame remains disabled.

    For Multiple Answer Single Select (S) or Multiple Answer Multi Select (M), you can add, edit, and remove responses.

    When you click **Add** or **Edit**, the Add Response form is displayed.



a. Specify the **Response**.

b. Select **Allow User Input** if you want the user to be able to provide any more information related to the response you have provided.

c. Select **Required** if you want the user response to be a required field.

d. Select the **Data Type**. The options are: Date, Integer, and Text.

e. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. You are returned to the Placement Reason Question form.

17. To change the sequence of questions, use the **Up**, **Down**, **Top**, and **Bottom** buttons.

18. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. You are returned to the Reasons Code Setup form.

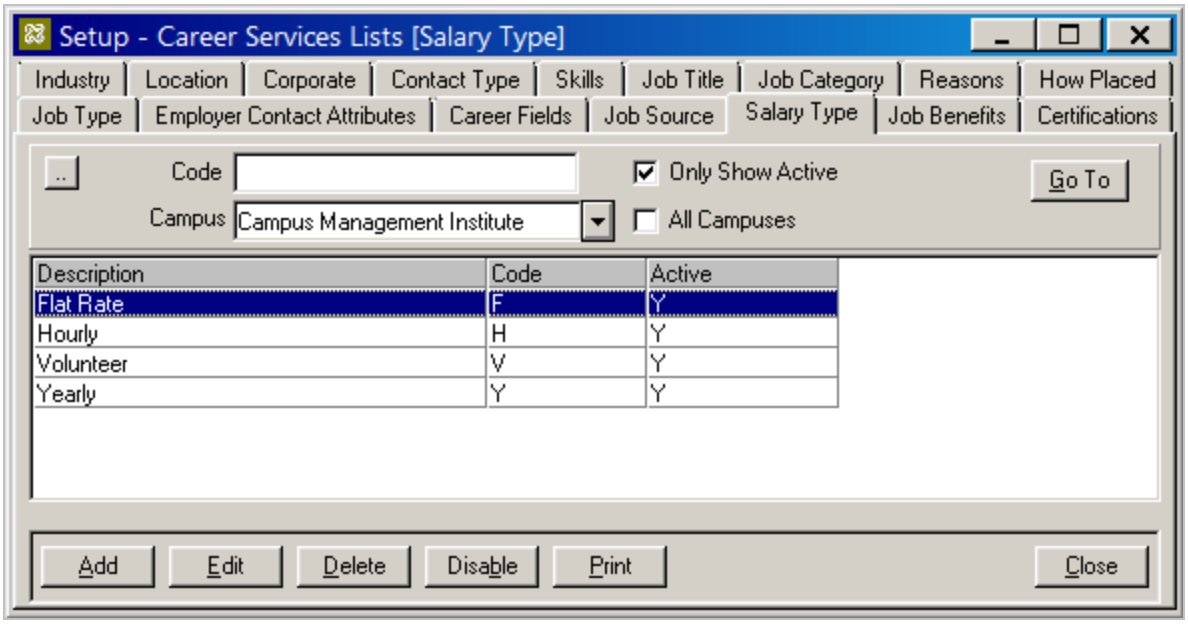
19. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Career Services Lists [Salary Type]

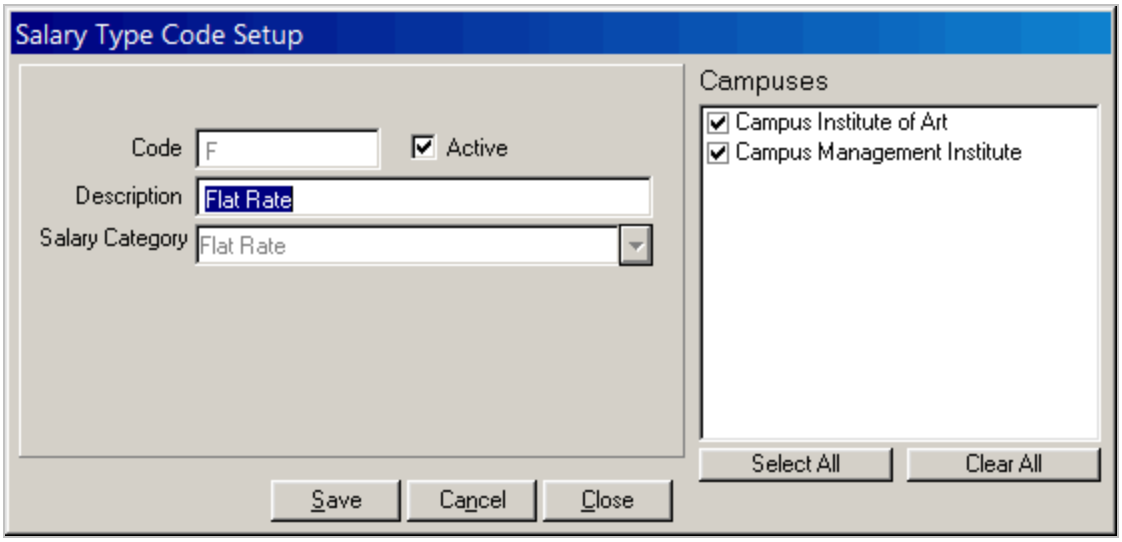
Salary Types are user-defined codes to distinguish different kinds of payments for jobs. Each salary type can apply to one or more campuses. Each salary type is associated with one of the salary categories (Flat Rate, Hourly, Volunteer, or Yearly).

To add or edit a list of salary type codes:

1. Navigate to **Lists** > **Career Services**. The Setup - Career Services Lists form is displayed.
2. Select the **Salary Type** tab.



3. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Salary Type Code Setup form is displayed.



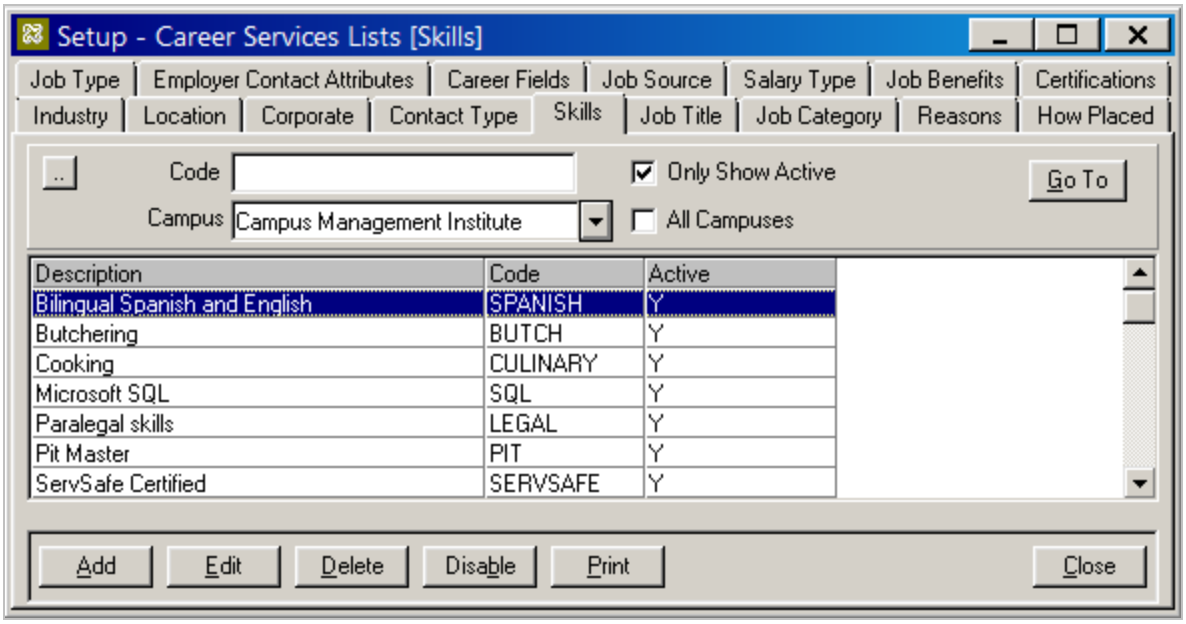
7. Specify a unique **Code**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Enter a **Description**.
10. Select a **Salary Category**. The categories are system-defined and include:
    - Hourly - payment of wages is based on the number of hours worked.
    - Yearly - payment of wages is based on an annual amount.
    - Volunteer - payment of wages is optional. The Volunteer salary category counts as a placement for an institution; however, when calculating the average salary information on the Placement Stats/Misc Breakdown report, the number of graduates used to calculate the averages will not include those in a Volunteer salary category.
    - Flat Rate - payment is a discrete amount such as a bonus or a commission given to a student by his or her employer. This salary category is included when calculating the student's overall salary for the placement.
11. Select one or more **Campuses**.
12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Career Services Lists [Skills]

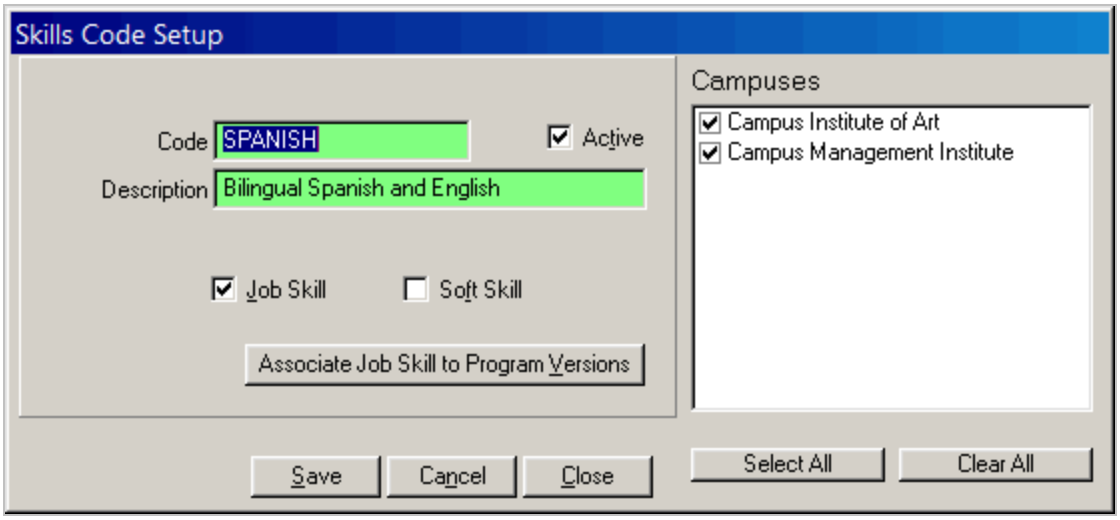
The Skills code list is used to identify special skills exhibited by your students. Skills from the student's Placement master record can be matched with skills required by employers for available jobs.

To add or edit a list of skill codes:

1. Navigate to **Lists** > **Career Services**. The Setup - Career Services Lists form is displayed.
2. Select the **Skills** tab.



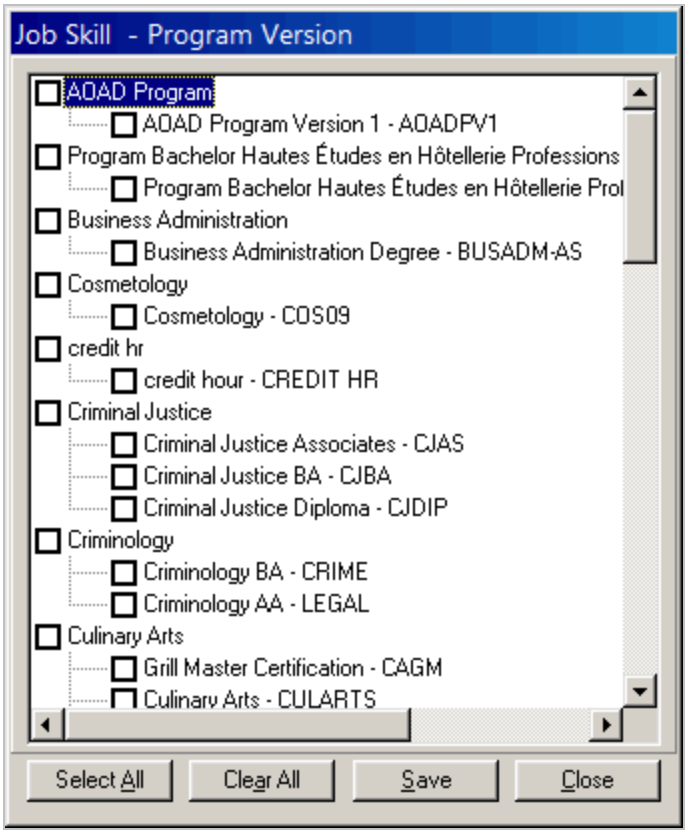
3. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Skills Code Setup form is displayed.



7. Specify a unique **Code**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Enter a **Description**.
10. Select one or more **Campuses**.
11. Select the **Job Skill** check box if the skill is used as a job requirement for employers.

    Employers hire students from different program versions. An employer may not hire students from all programs offered at a given institution. By associating skills sets from program versions with an employer, advisors can identify employers that they can contact when trying to place a graduate from a particular major.
12. Select the **Soft Skill** check box if the skill is to be used as a job requirement for employers.

    Employers often require soft skills not related to a student's program version. For example, if the employer's clients are in Belgium, the employer may want to interview only candidates who speak Flemish.
13. Click **Associate Job Skill to Program Versions** to match job skills to program versions. The Job Skill - Program Version form is displayed.



14. To associate a skill with a **program version**, select the check box next to the program version label.

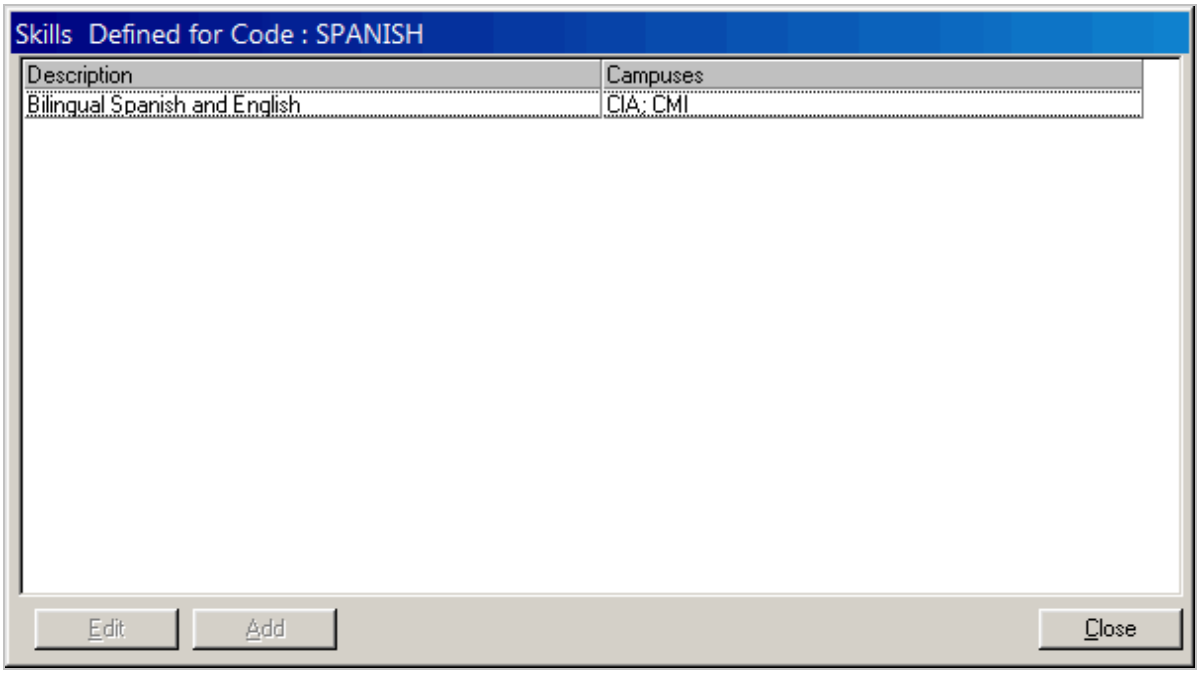
    To associate a skill with a **program**, select the check box next to the program label.

15. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. You are returned to the Skills Code Setup form.

16. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Duplicate Codes

If you add a code to the database that duplicates a code already on file, a form listing the duplicate codes is displayed. The rows on the grid include the skill description and the campuses to which the code is assigned.



Select a row and click **Edit** to change the record.

If you do not see a row for the campus, click **Add** to return to the Skill Code Setup form.

The **Add** button is not available if all campuses to which you have access already have the code. When you go back to the Add form, all campuses that already have the code assigned are eliminated from the list of campuses. You can assign the duplicate code to any or all remaining campuses.

Occupation Insight Skills

Skills codes from the Occupation Insight (OI) product can be imported and stored in CampusNexus Student. These imported skills are stored with the record noting the Source of the skill (OI) and whether the skill is currently Active with the Source. These skill codes are separate from the standard Career Services (CS) skill codes.

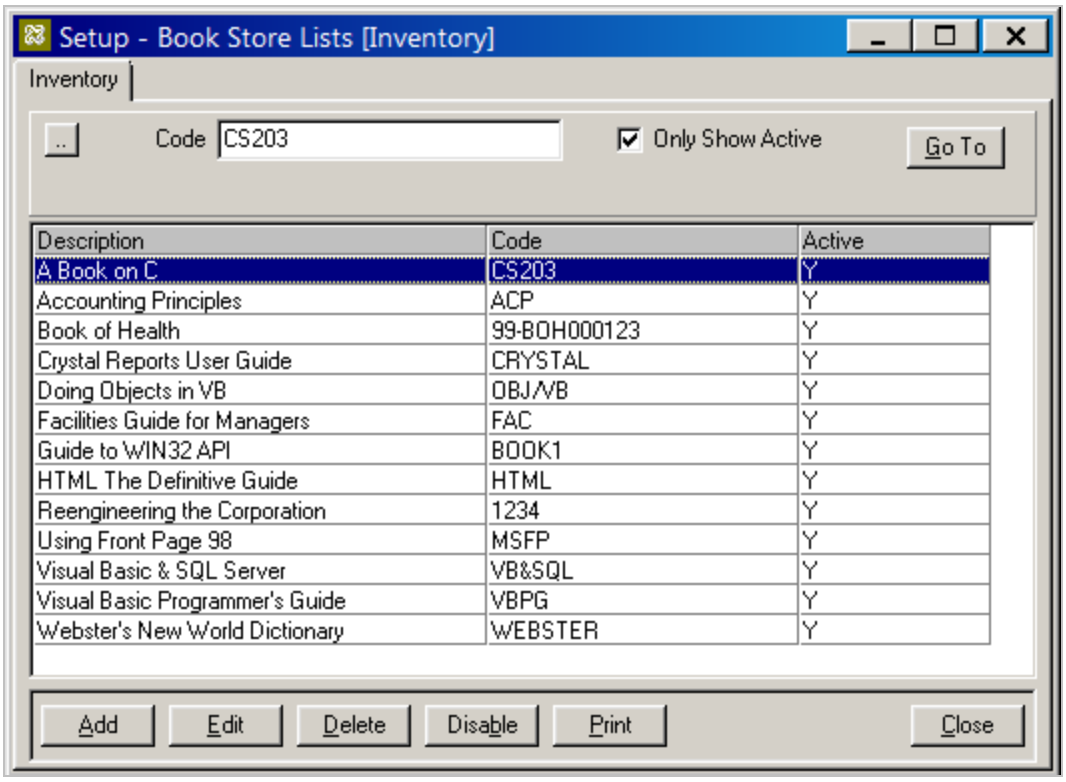
When an OI code is reviewed in the Skills Code Setup form, the Code and Description fields are not editable. All other fields for the codes can be updated.

Lists > Book Store

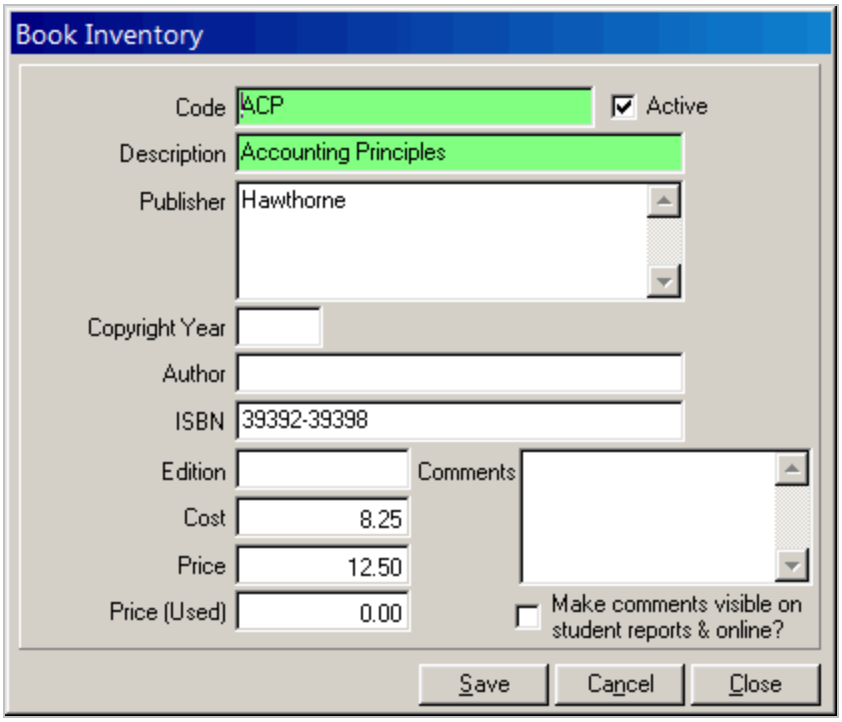
The Book Store inventory system is used to manage books, supplies, and other items that are required by the faculty of your institution. The inventory is related to the courses offered. When you set up a course to be offered at your institution, you can assign text books from the inventory list by creating book lists. The book lists are available when scheduling course sections as a method of assigning text books and other course materials to a specific course section. You must enter books and course materials in the inventory list before you can select them for a course.

To add or edit a list of book store inventory codes:

1. Navigate to **Lists** > **Book Store**. The Setup - Book Store Lists form is displayed. The Inventory tab is displayed by default and any existing inventory codes are listed.



2. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
3. Select **Only Show Active** to view only active records. Clear this check box to view all records.
4. Click **Add**, or select a record and click **Edit**. The Book Inventory form is displayed.



5. Specify appropriate options.

Field Descriptions

Field	Description
Code	Enter a code of up to 20 characters for this inventory item.
Active	Select or clear the Active check box to designate the record as active or inactive. **Note**: Disabling an Inventory item ensures that the item cannot be assigned to new book lists or class sections; however it is not removed from existing course book lists or class sections.
Description	Enter the title of the book or description of other items.
Publisher	Enter the name of the book publisher.
Copyright Year	Enter the year the book was copyrighted.
Author	Enter the name of the author(s) of the book. Enter the first author's last name first to facilitate a search.
ISBN	Enter the ISBN book identifier number.
Edition	If applicable, enter the Edition.
Cost	Enter the dollar amount of the item cost.
Price	Enter the dollar amount of the item sales price.
Price (Used)	Enter the price for the item in used condition.

Field	Description
Comments	Enter any desired comments.
Make comments visible on student reports & online	Select the check box to indicate if the comment field is to be included in student facing reports and online in Portal.

6. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. You are returned to the Setup - Book Store Lists form.
7. To remove a book from the lists, select the book in question and click **Delete**.

   Note: A book may not be deleted if it is attached to a Course Book list or Course Section.
8. To print a list of the books in the Book List Inventory, click **Print**.

   Note: All Inventory details are included in the printed report including comments, regardless of whether the "Make Comments Visible on student reports & online" option is selected because this report is not considered to be student facing.

Lists > Loan Management

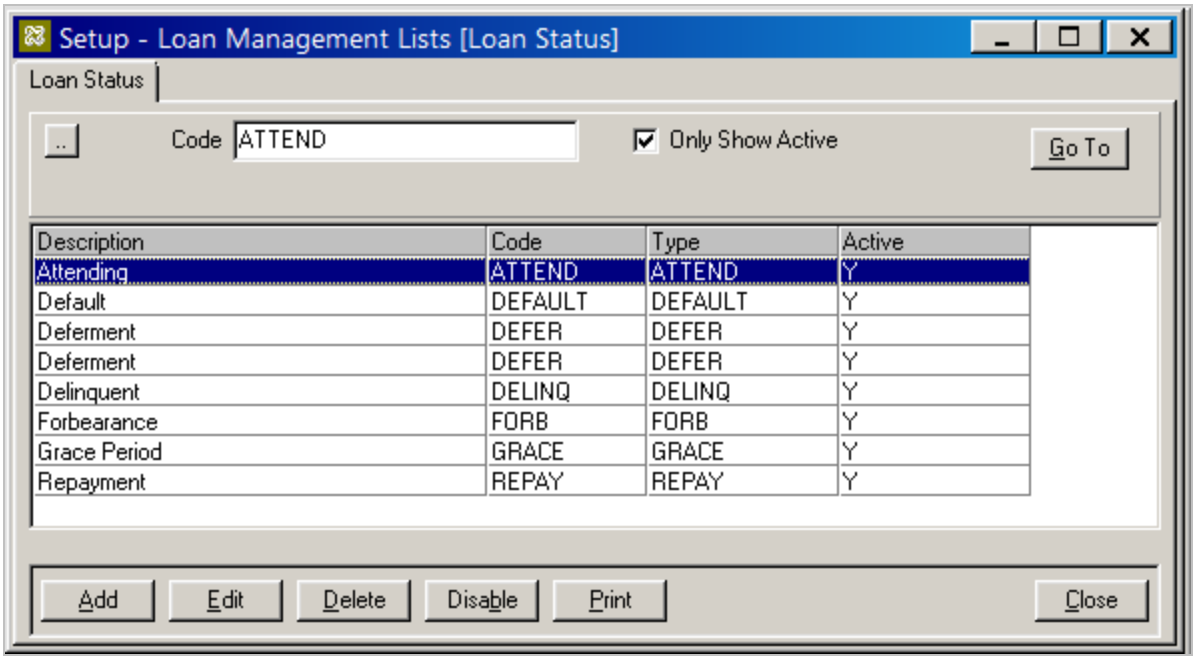
Use the Setup - Loan Management Lists form to define loan status codes. The list is pre-loaded with the following statuses:

- Attending
- Default
- Deferment
- Delinquent
- Forbearance
- Grace Period
- Repayment

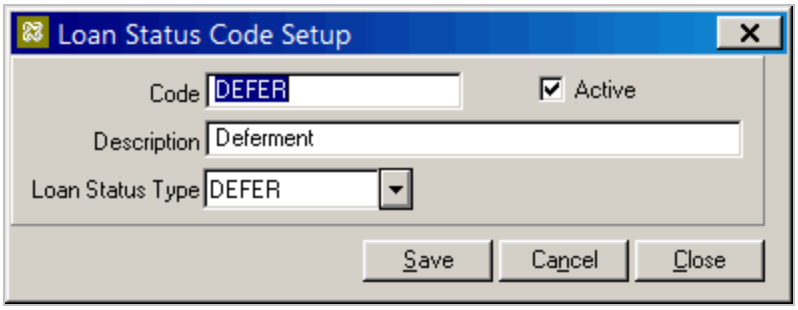
Attending, Grace, and Repayment are system codes which cannot be edited or deleted. Other loan status codes can be edited. You can add school-defined loan status codes.

To add or edit the list of loan status codes:

1. Navigate to **Lists** > **Loan Management**. The Setup - Loan Management Lists form is displayed.



2. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
3. Select **Only Show Active** to view only active records. Clear this check box to view all records.
4. Click **Add**, or select a record and click **Edit**. The Loan Status Code Setup form is displayed.



5. Specify a unique **Code**.
6. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
7. Enter a **Description**.
8. Select a **Loan Status Type**. Loan Status Types are codes that can be assigned to new Loan Statuses. Loan Status Types are provided by CampusNexus Student as system codes. The Loan Status Types are:

    - ATTEND *
    - DELINQ
    - DEFAULT
    - DEFER
    - FORB
    - GRACE *
    - REPAY *

    * Indicates System Code. No additional Loan Statuses are permitted for this type.
9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Lists > Student Services

Student Services are non-academic items that are part of the student life cycle. When you navigate to Lists > Student Services, the Setup - Student Services Lists form is displayed. Add, edit, delete, enable, disable, and print Student Services lists from the following tabs:

- Athletic Status
- Disability Services Status
- Disability Type
- Location
- Recruitment Type
- Room Type
- Services
- Service Billing Method
- Service Categories
- Sports
- Veterans Affairs Benefit
- Veterans Affairs Certification Type
- Veterans Affairs Code

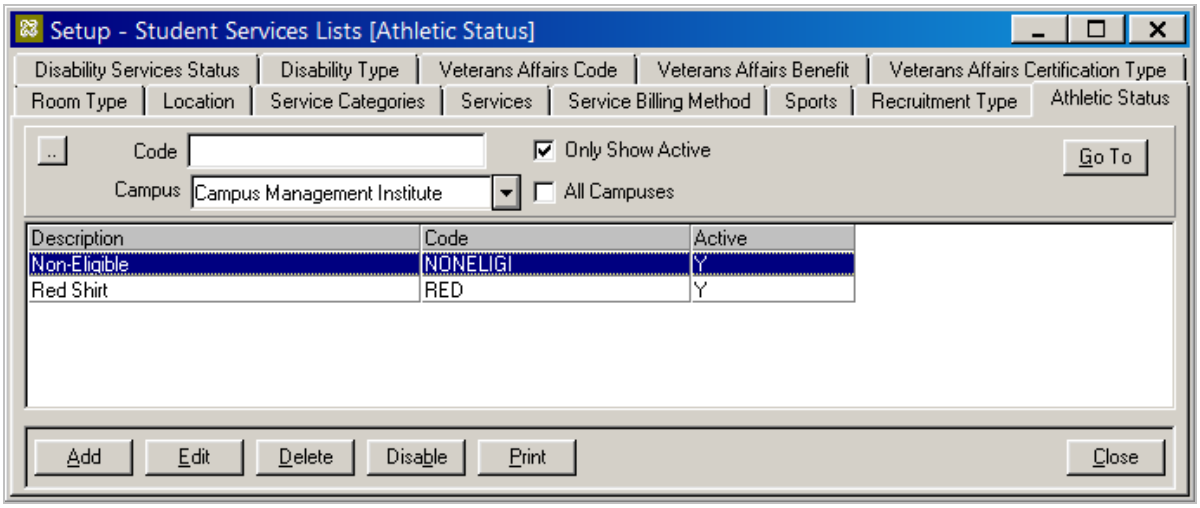
See Maintaining Lists for instructions on adding, editing, deleting, disabling, enabling, and printing lists.

Setup - Student Services Lists [Athletic Status]

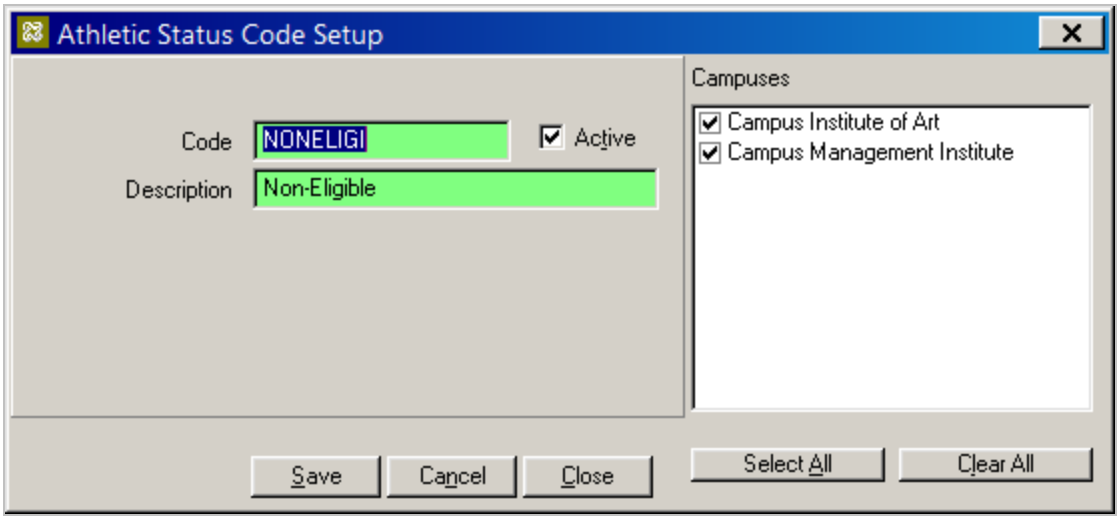
You can create a list of statuses that represent the current athletic status of athletes. Each status contains a code and a description.

To add or edit a list of athletic status codes:

1. Navigate to **Lists** > **Student Services**. The Setup - Student Services Lists form is displayed.
2. Select the **Athletic Status** tab.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Athletic Status Code Setup form is displayed.



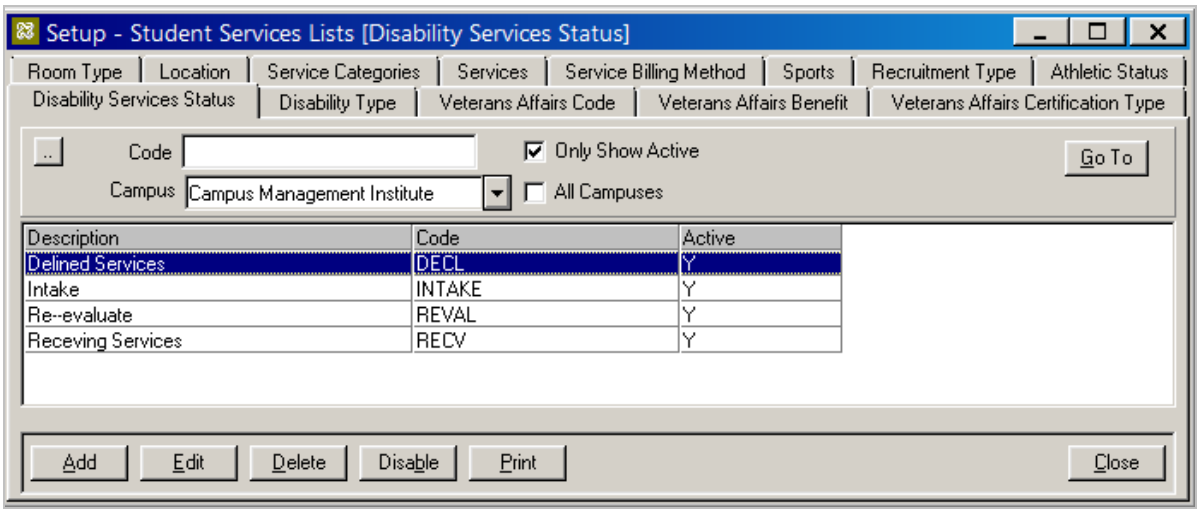
7. Specify a unique **Code**.
8. Enter a **Description**.
9. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
10. Select one or more **Campuses**.
11. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Student Services Lists [Disability Services Status]

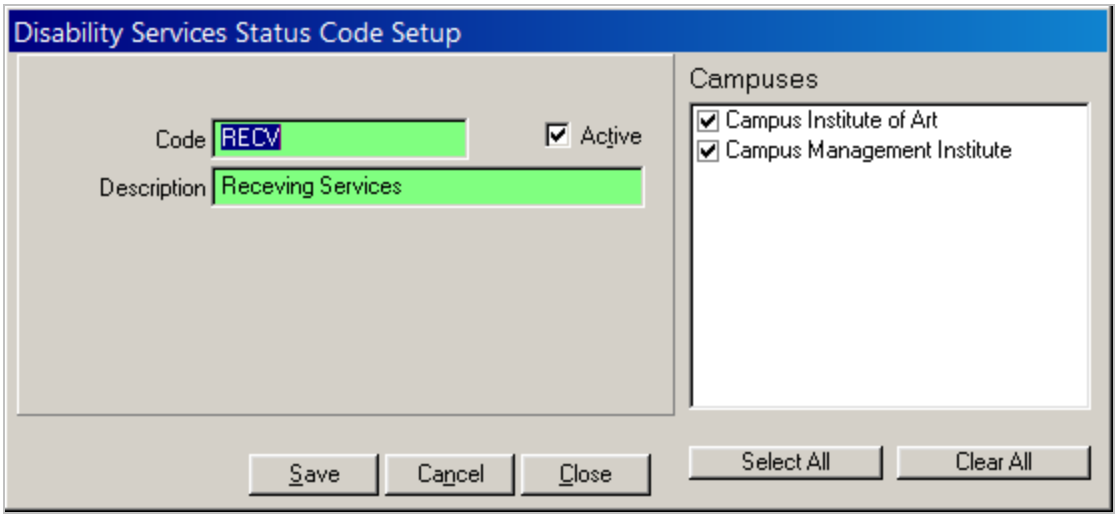
You can define statuses for use within the Disability Services Office.

To add or edit a list of disability services status codes:

1. Navigate to **Lists** > **Student Services**. The Setup - Student Services Lists form is displayed.
2. Select the **Disability Services Status** tab.



3. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Disability Services Status Code Setup form is displayed.



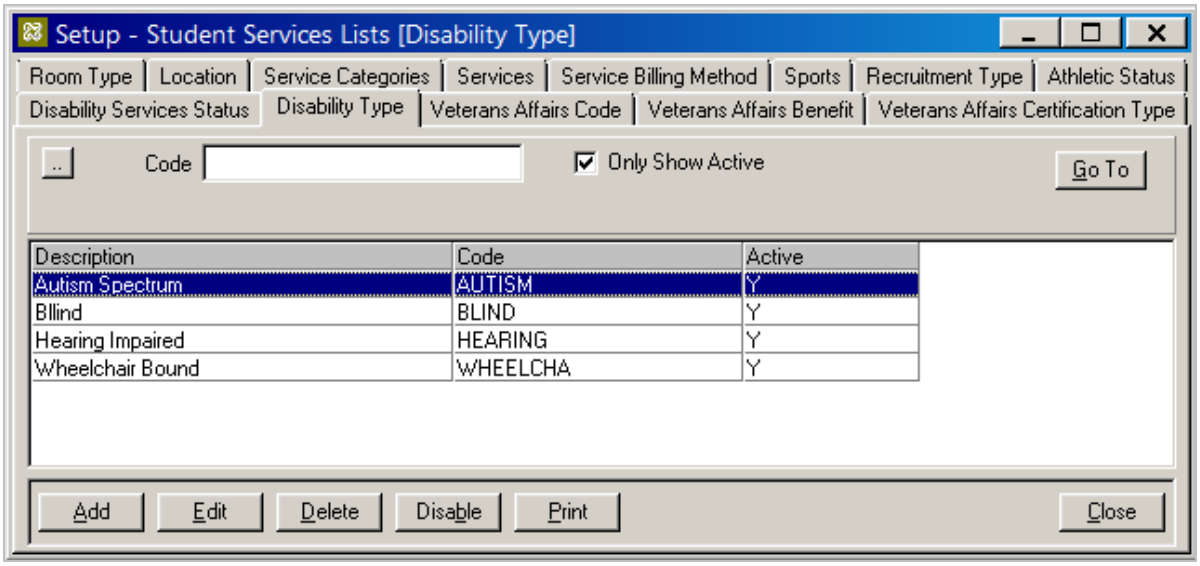
7. Specify a unique **Code**.
8. Enter a **Description**.
9. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
10. Select one or more **Campuses**.
11. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Student Services Lists [Disability Type]

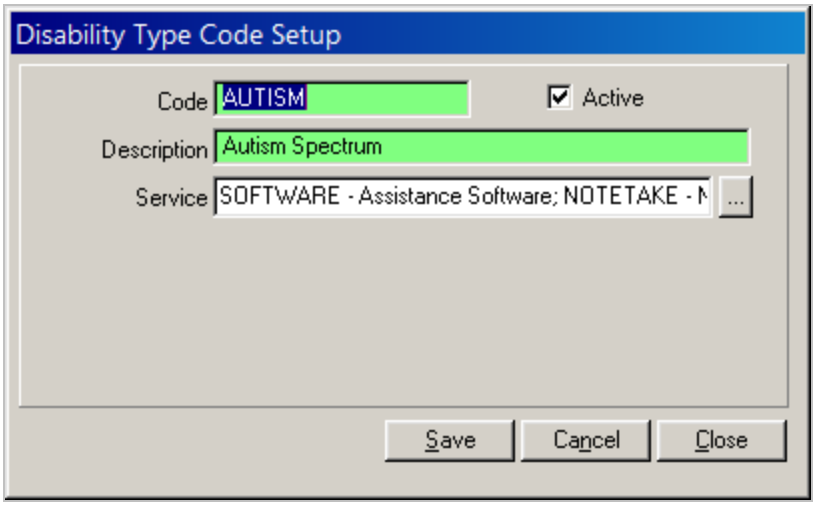
You can define disability types, e.g., hearing impairment or physical impairment, and associate services like assistive devices or wheel chairs, with a disability type.

To add or edit a list of disability type codes:

1. Navigate to **Lists** > **Student Services**. The Setup - Student Services Lists form is displayed.
2. Select the **Disability Type** tab.



3. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Disability Type Code Setup form is displayed.



6. Specify a unique **Code**.

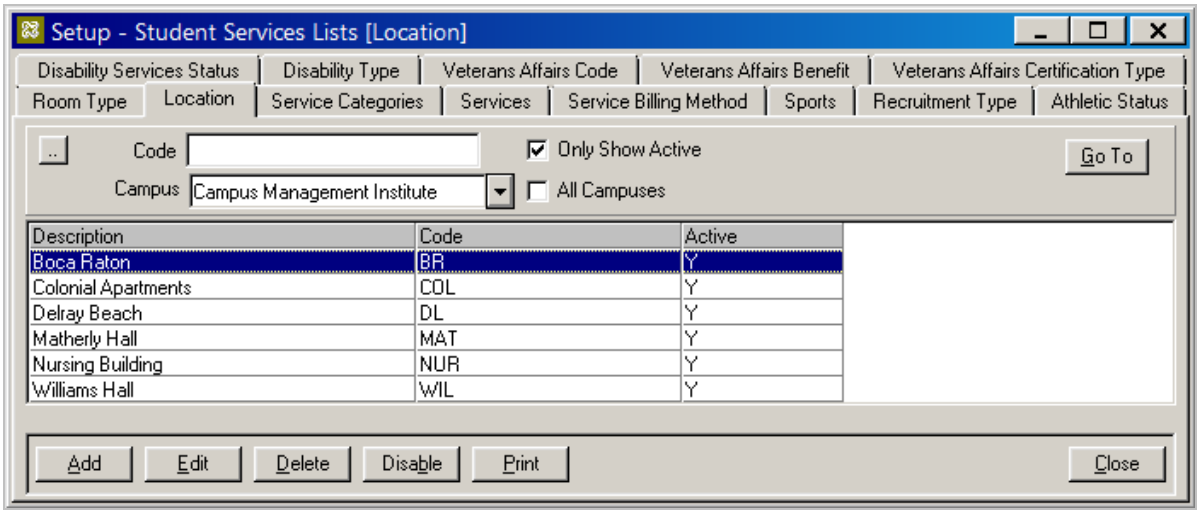
7. Enter a **Description**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Select the appropriate **Services**. Click to select multiple services that have previously been configured.
10. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Student Services Lists [Location]

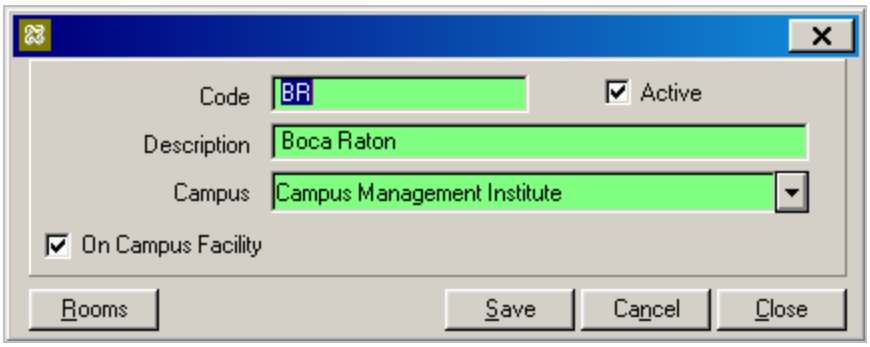
You can set up a list of locations for student services and events at your institution.

To add or edit a list of location codes:

1. Navigate to **Lists** > **Student Services**. The Setup - Student Services Lists form is displayed.
2. Select the **Location** tab.

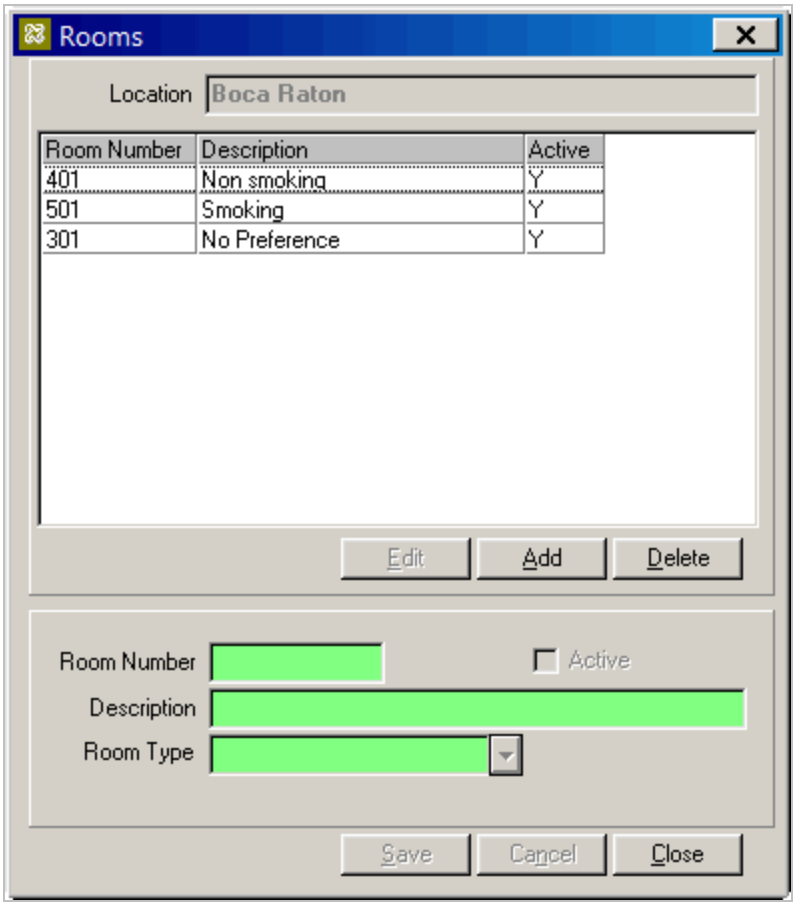


3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Location Code Setup form is displayed.



7. Specify a unique **Code**.
8. Enter a **Description**.
9. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
10. Select a **Campus**.

11. If the location is considered 'On Campus', select the **On Campus Facility** check box so that the location value populates the Report Incident form as 'On Campus'. If this check box is cleared, the location is displayed within the Report Incident Non-Campus Property drop-down selection.
12. Click **Save**.
13. Click **Rooms**.



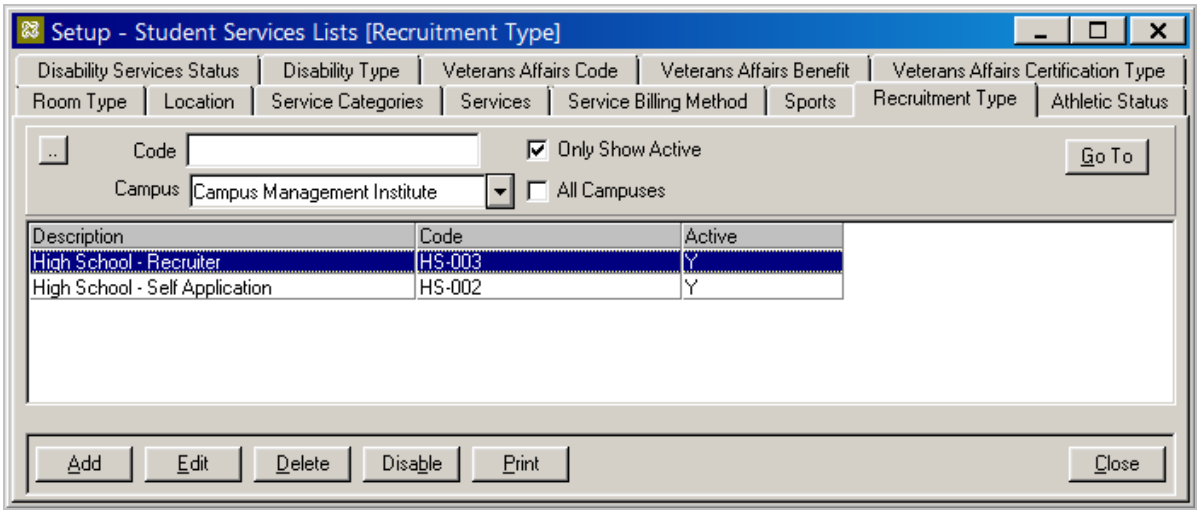
14. Click **Add**, or select a record and click **Edit**.
15. Specify a **Room Number**.
16. Enter a **Description**.
17. Select a **Room Type**.
18. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
19. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Student Services Lists [Recruitment Type]

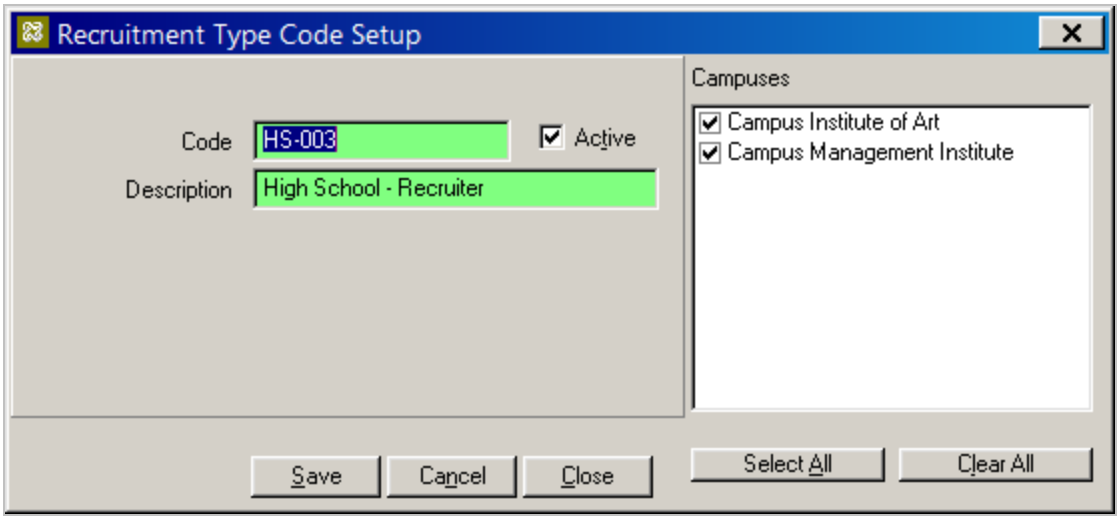
You can create a list of codes and descriptions indicating the type of recruitment and when the student athlete was recruited into the Athletic Association (for example, First Year Recruited, Second Year Walk In).

To add or edit a list of recruitment type codes:

1. Navigate to **Lists** > **Student Services**. The Setup - Student Services Lists form is displayed.
2. Select the **Recruitment Type** tab.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Recruitment Type Code Setup form is displayed.



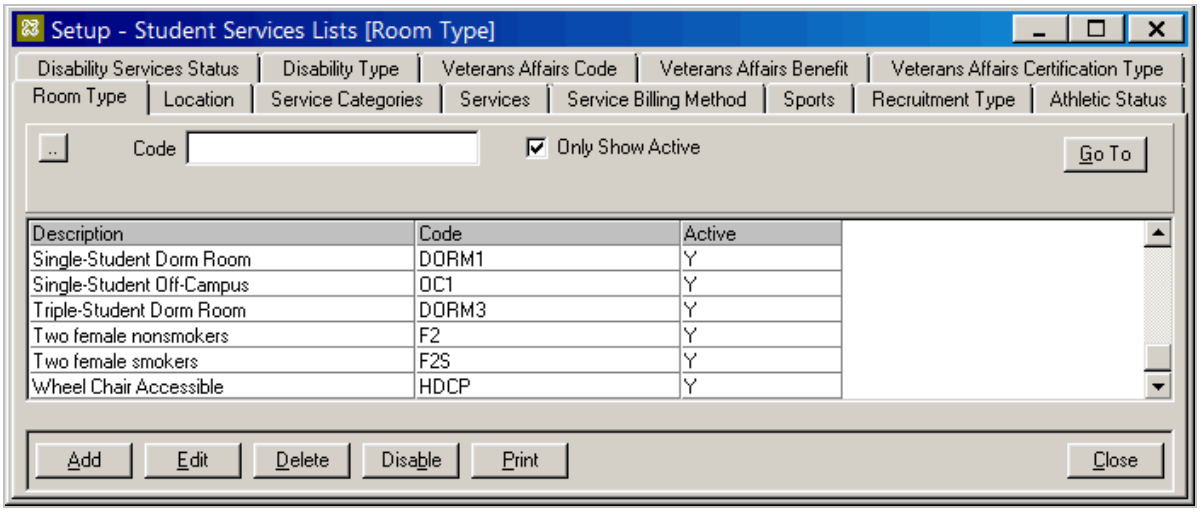
7. Specify a unique **Code**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Enter a **Description**.
10. Select one or more **Campuses**.
11. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. You will be returned to the Setup - Student Services Lists [Recruitment Type] form.

Setup - Student Services Lists [Room Type]

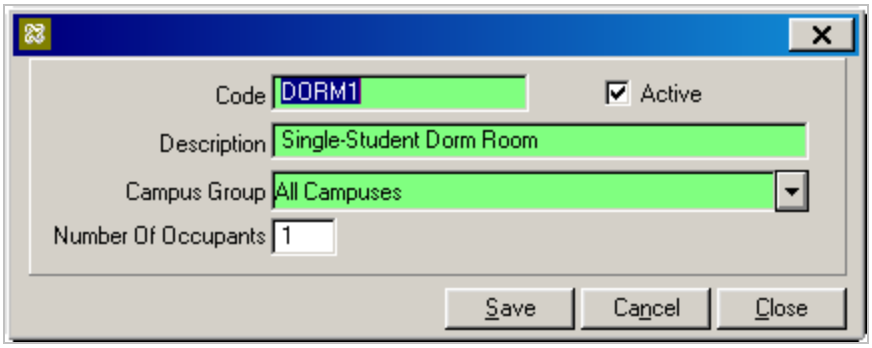
You can define a room type list for student services as needed at your institution.

To add or edit a list of room type codes:

1. Navigate to **Lists** > **Student Services**. The Setup - Student Services Lists form is displayed.
2. Select the **Room Type** tab.



3. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Room Type Code Setup form is displayed.



6. Specify a unique **Code**.
7. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
8. Enter a **Description**.
9. Select a **Campus Group**

10. Specify the **Number of Occupants**.
11. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Student Services Lists [Services]

Use the Services tab of the Setup - Student Services Lists form to configure billable services and their campus associations. The Service Billing Method must have been previously defined.

Services are grouped by categories. For example, Cable TV or Parking fees can be grouped in the Housing Service Category. Service Categories must be set up before Services can be assigned to Service Categories.

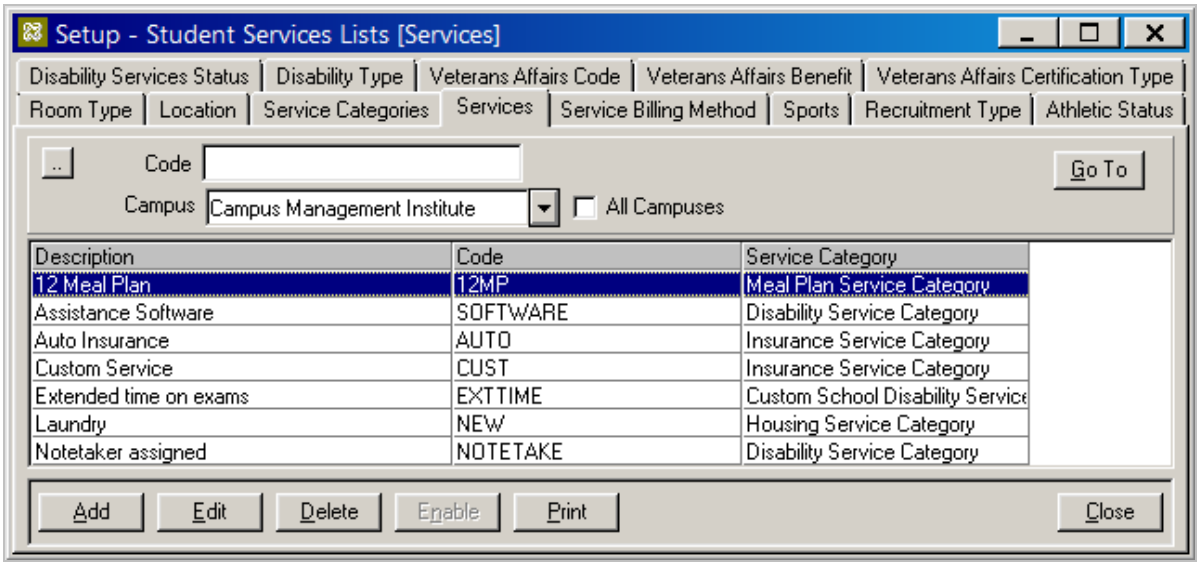
Once set up, the Student Services module enables you to define a student as requiring housing assistance for example, along with names of requested roommates, actual roommates, roommate gender preference, smoking preference, room type preference, location, room assigned, move in and move out dates, and monthly fees. Included in this setup are data typing, validation lists, and detailed field descriptors. Staff can also add more data to a Student Service through user-defined fields.

Services can be applied to more than one student at a time using the batch option under Daily > Student Services > Batch Assign Services. Filtering criteria are Start Date, Program Version, Status, and Charge Amount.

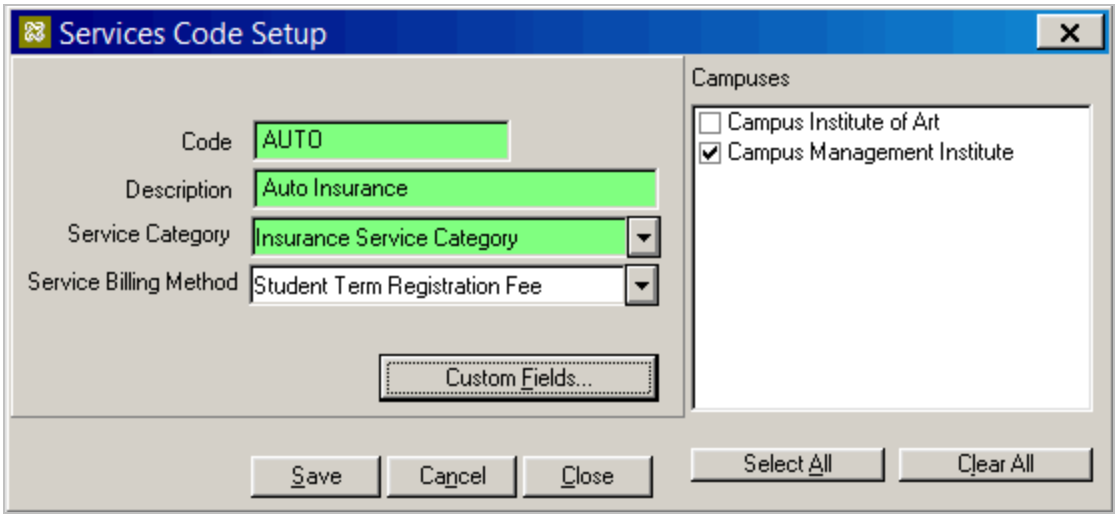
Custom fields can be created to accommodate special services for your institution.For more information, see Custom Fields for Student Services.

To add or edit a list of student services codes:

1. Navigate to **Lists** > **Student Services**. The Setup - Student Services Lists form is displayed.
2. Select the **Services** tab.



3. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Click **Add**, or select a record and click **Edit**. The Services Code Setup form is displayed.



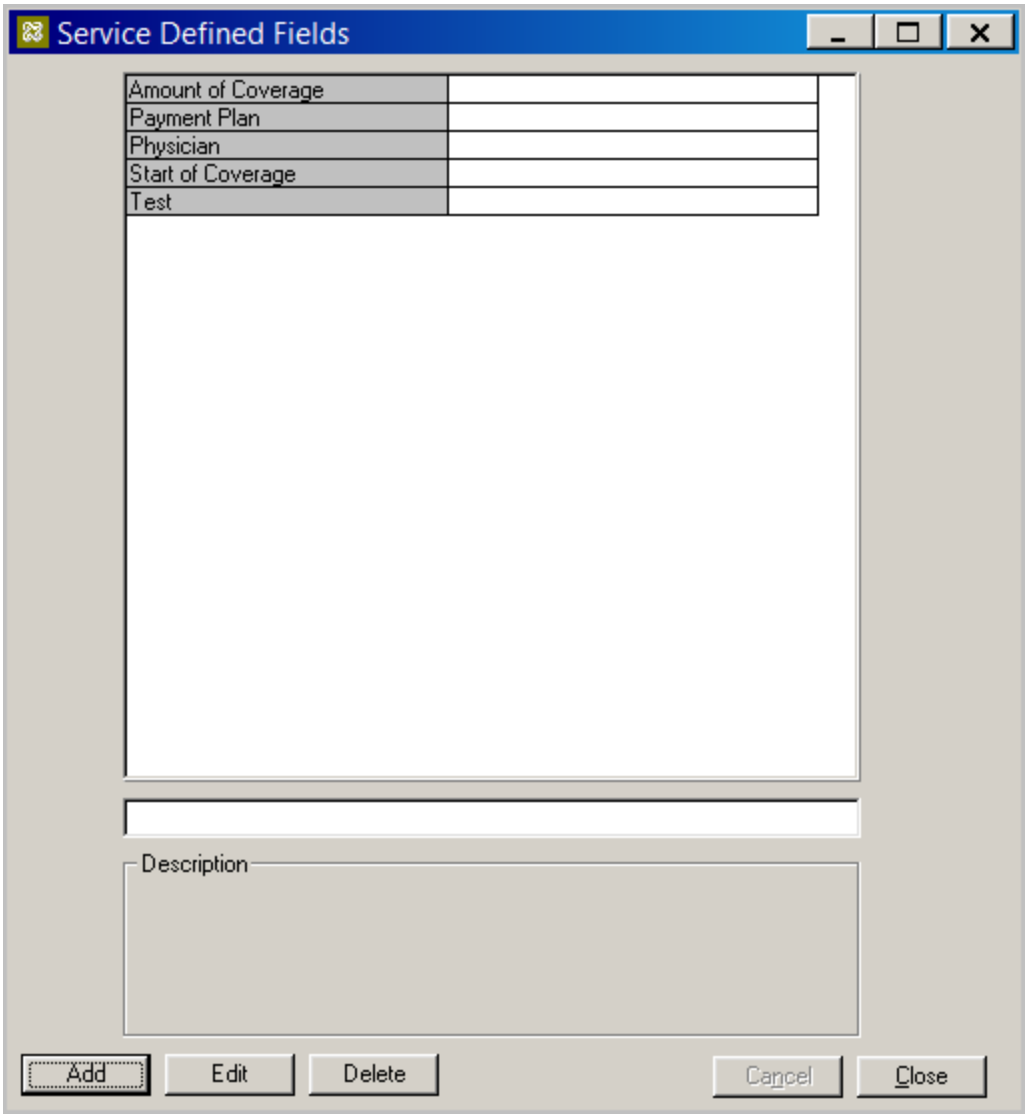
6. Specify a unique **Code**.
7. Enter a **Description**.
8. Select the **Service Category**. System service categories include:
    - Housing Service Category
    - Insurance Service Category
    - Meal Plan Service Category
    - Disability Service Category
    - Other categories can be added by the system administrator at your institution.
9. Select a **Service Billing Method**.

    Note: Some service categories, for example the Disability Service Category, cannot be associated with a billing method.
10. Select one or more **Campuses**.
11. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

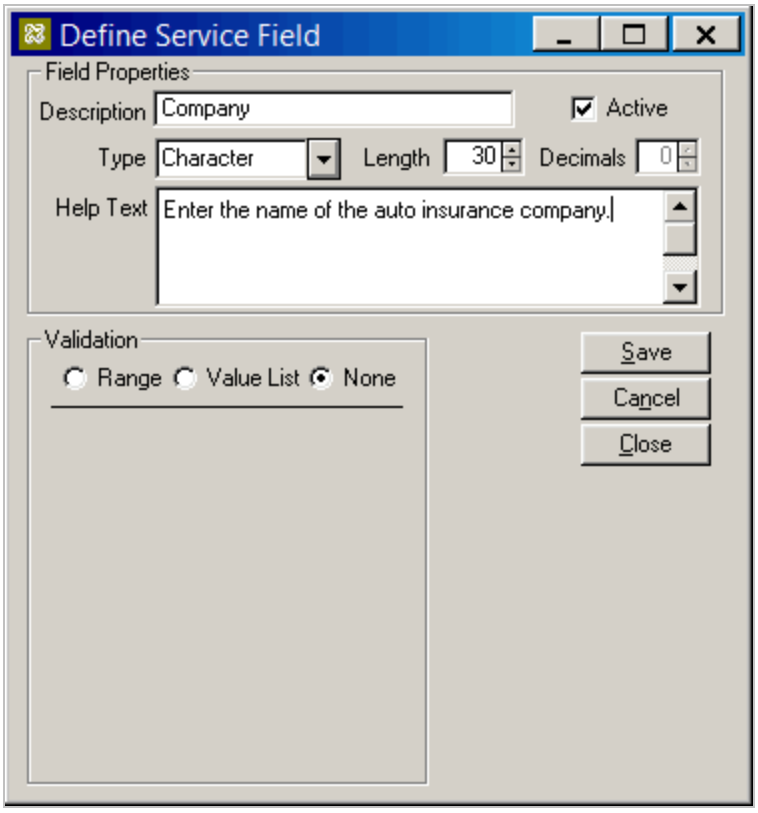
Adding Custom Fields for Student Services

For billable school services that are not included in those provided by CampusNexus Student, you can add school-defined services and associate custom fields with a Student Service. You can enter values in the custom fields when they are added to a student record. CampusNexus Student stores these values on each instance of a service per student.

1. Navigate to **Lists > Student Services**, and select the **Services** tab.
2. Select the service for which you want to add custom fields, and click **Edit**. The Services Code Setup form is displayed.
3. Click **Custom Fields**. The Service Defined Fields form is displayed showing the existing custom fields (if any).



4. Click **Add**, or select a record and click **Edit**. The Define Service Field form is displayed.



5. Enter a **Description**.
6. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
7. Select the data **Type**. Type options include:
   - Character- any alphanumeric characters (numbers, letters, or symbols up to a maximum length of 99).
   - Numeric - numbers only. Numeric fields can use range, value list, or no validation. You can specify two decimal places.
   - Date - dates only.
8. Specify the **Length** of the custom field.
9. In the **Help Text** box, specify any comments you want displayed in the **Description** field of the Service Defined Fields form when the field is selected .
10. Select the **Validation** used for the custom field. The available validation options depend on the Type:
    - Character- Value List or no validation.
    - Numeric - Range, Value List, or no validation.
    - Date - Range or no validation.
11. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

    Your custom fields appear in the Service Defined Fields form.

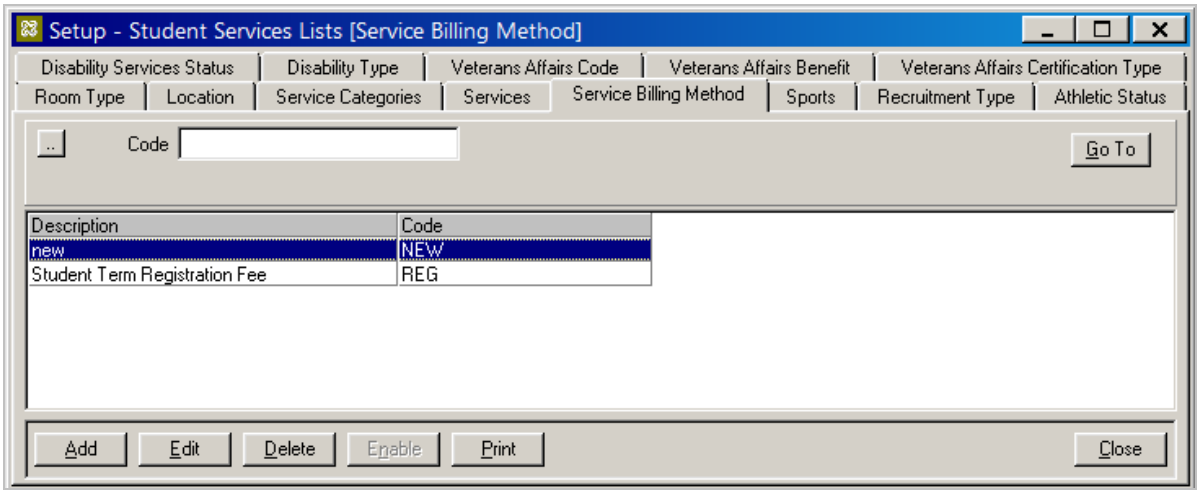
Setup - Student Services Lists [Service Billing Method]

Use the Service Billing Method tab of the Student Services Lists form to designate fees for services using a combination of flat rates and calculated rates based on student characteristics. Provide a Code, Description, Transaction Code (for tracking charges in Accounting), and other information to set up billing for a student service.

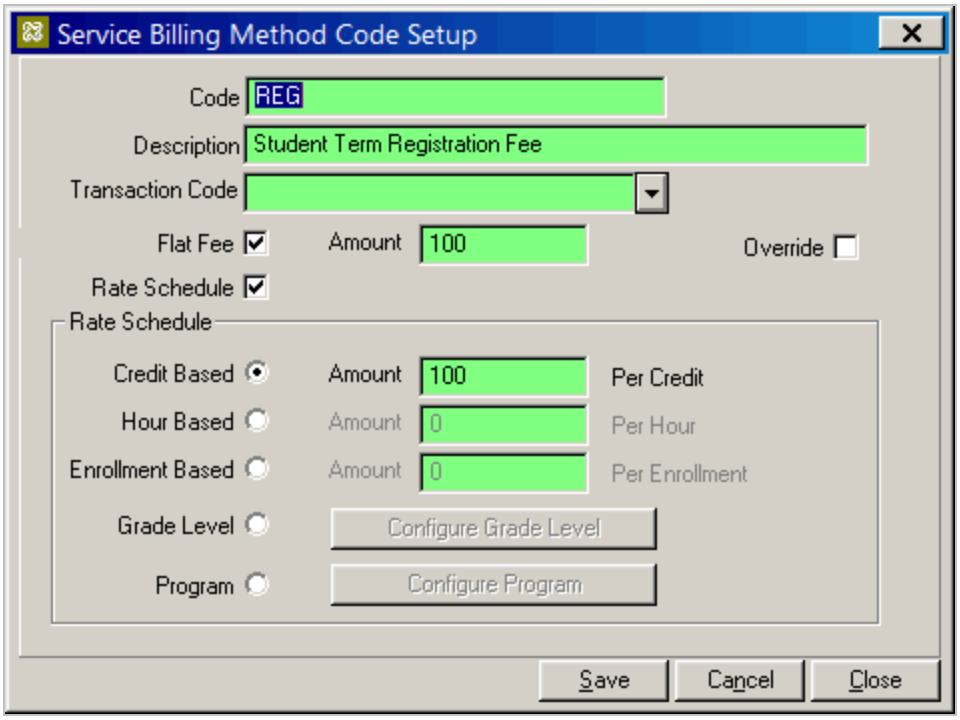
Service Billing Methods and Service Categories must be set up before Services can be configured.

To add or edit a list of service billing method codes:

1. Navigate to **Lists** > **Student Services**. The Setup - Student Services Lists form is displayed.
2. Select the **Service Billing Method** tab.

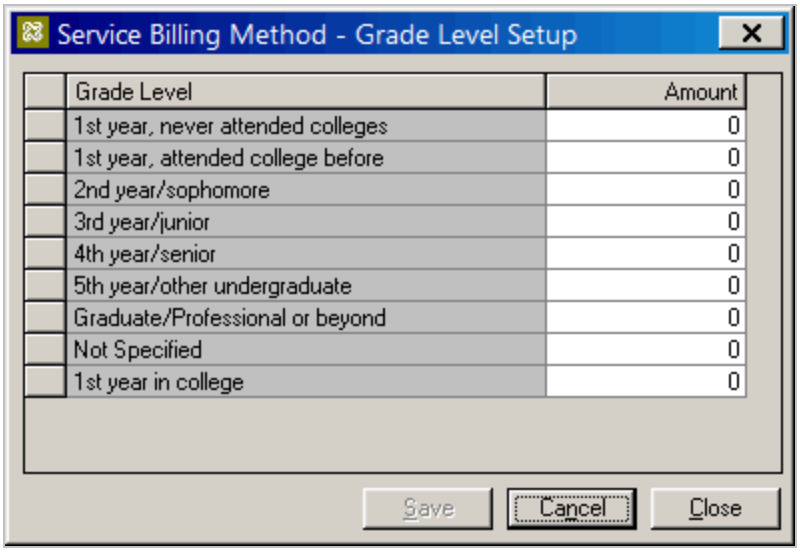


3. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Service Billing Method Code Setup form is displayed.

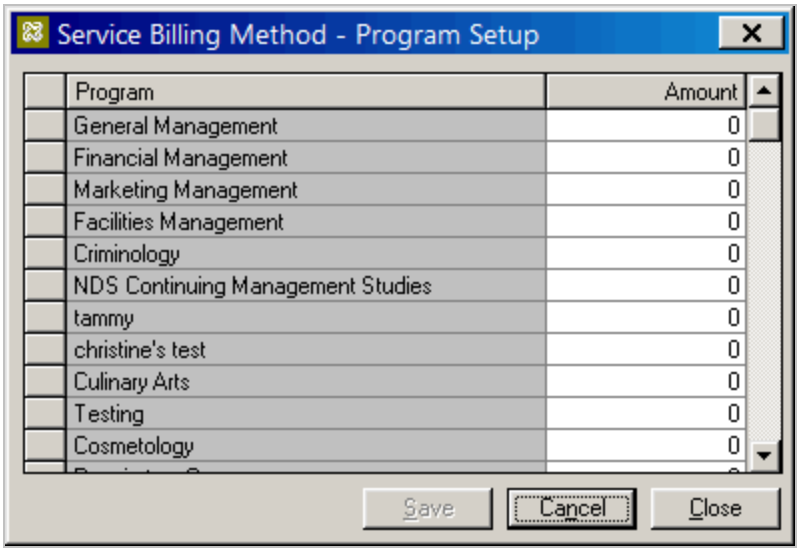


7. Specify a unique **Code**.
8. Enter a **Description**.
9. Select a **Transaction Code**. Examples of Transaction Codes are Course Extension Fees, Computer Services, Art Supplies, Lab Fees, etc.

   Transaction Codes are not Service Categories. They are generally fees for specific services that comprise Service Categories.
10. Select **Flat Fee** if applicable. If you select Flat Fee, specify the dollar amount of the fee.
11. If you select **Rate Schedule**, additional forms appear in which to configure amounts applicable to each grade or program, as follows:
    - Credit Based - Specify the dollar amount per credit.
    - Hour Based - Specify the dollar amount per hour
    - Enrollment Based - Specify the dollar amount per enrollment
    - Grade Level - Click **Configure Grade Level**. The Service Billing Method - Grade Level Setup form is displayed. Enter the amount by Grade Level. These settings may be saved or canceled.



- Program Level - Click **Configure Program**. The Service Billing Method - Program Setup form is displayed. Enter the amount by Program. These settings may be saved or canceled.



12. Select or clear **Allow Override**. If you select this option, the flat fee can be overridden and alternate amount can be applied at the time of association with the Service.
13. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

See the Lists > Student Services form to add, delete, and edit services associated with the student.

Setup - Student Services Lists [Service Categories]

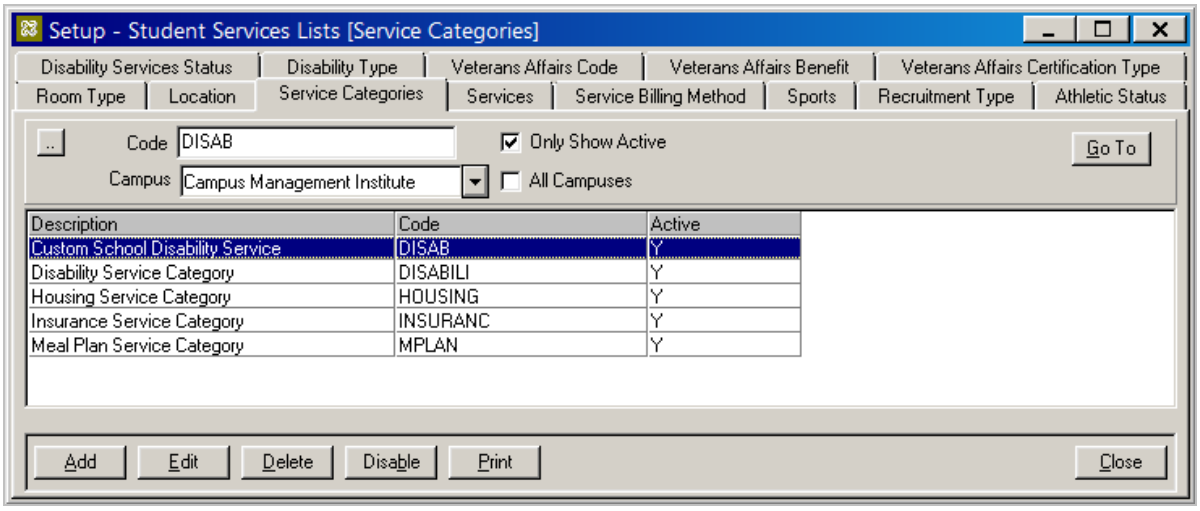
Institutions need the ability to assess fees for housing, meal plans, insurance, fines, etc. Some of these fees are picked up during registration billing, and some occur during a term. If a fee is charged after registration billing, Student Accounts staff should review and then post or reject the charges.

Fees for services are classified under broad associations of services called Service Categories. The default categories are Housing, Insurance, and Meal Plan. You can add additional categories as required. Billable services typically fall under one of these three service categories. For example, billable services associated with the Housing category could include cable TV in student housing and assigned parking spaces.

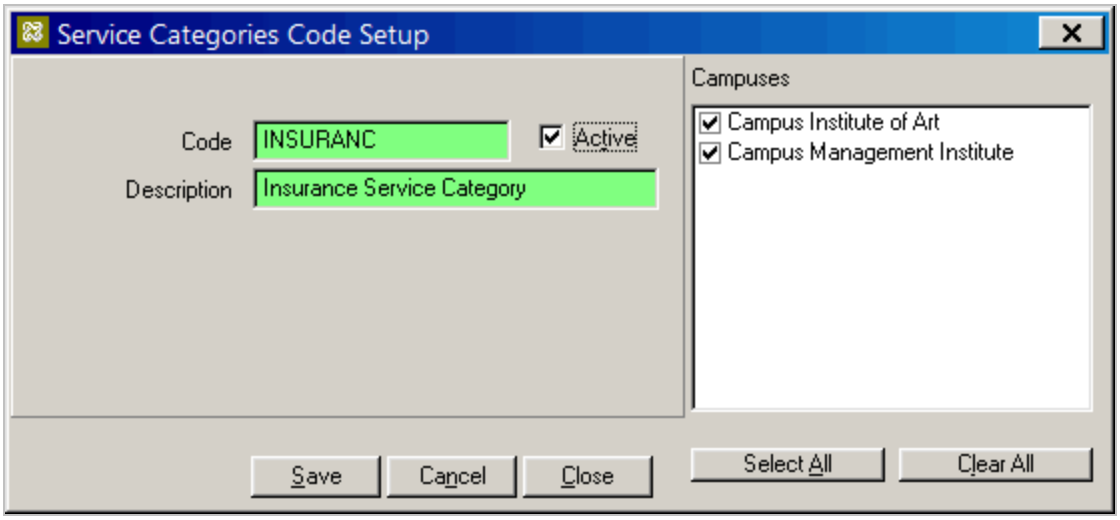
Other service categories, for example, the Disability Service Category, are used for configuring services and equipment, such as auxiliary aides, but are not used to attach any billing methods to these types of services. The Disability Service Category is a system-defined service category that cannot be changed and is available for use by all active campuses.

To add or edit a list of service categories codes:

1. Navigate to **Lists** > **Student Services**. The Setup - Student Services Lists form is displayed.
2. Select the **Service Categories** tab.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Service categories Code Setup form is displayed.



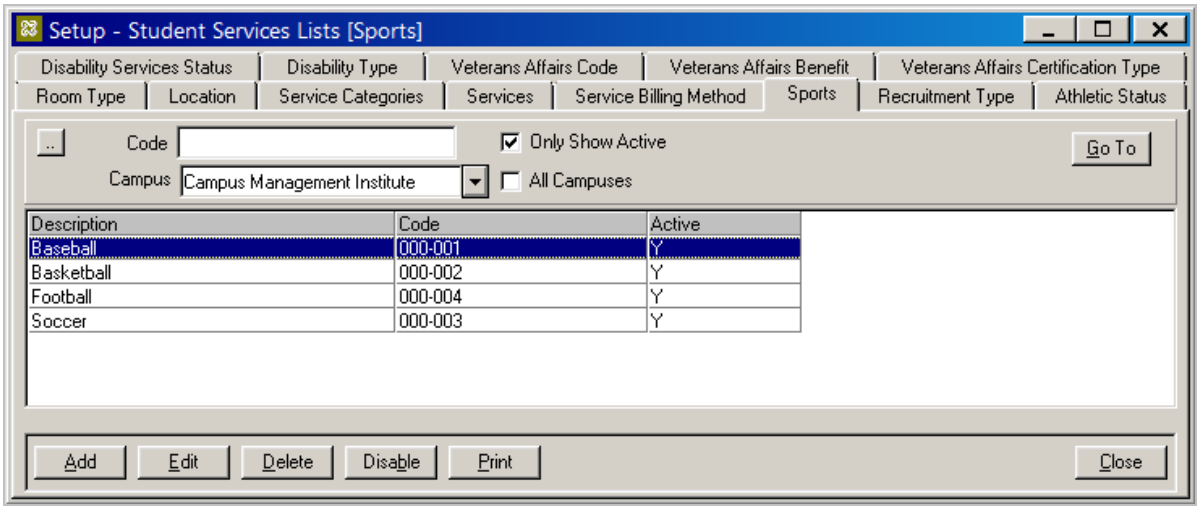
7. Specify a unique **Code**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Enter a **Description**.
10. Select one or more **Campuses**.
11. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Sports

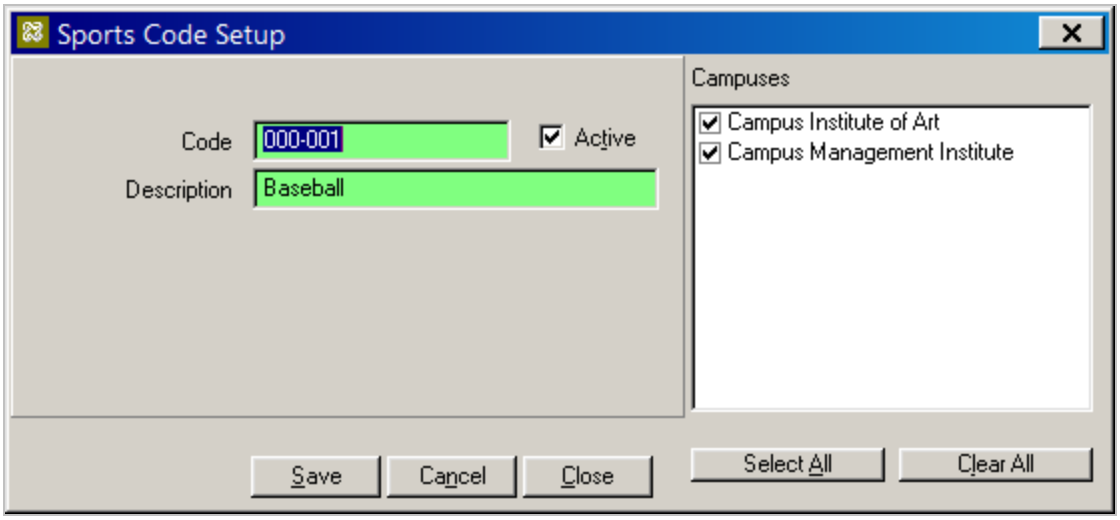
You can create a table of all sports in which your institution participates and the associated sports code of the Athletic Association to which the institution belongs.

To add or edit a list of sports codes:

1. Navigate to **Lists** > **Student Services**. The Setup - Student Services Lists form is displayed.
2. Select the **Sports** tab.



3. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Sports Code Setup form is displayed.



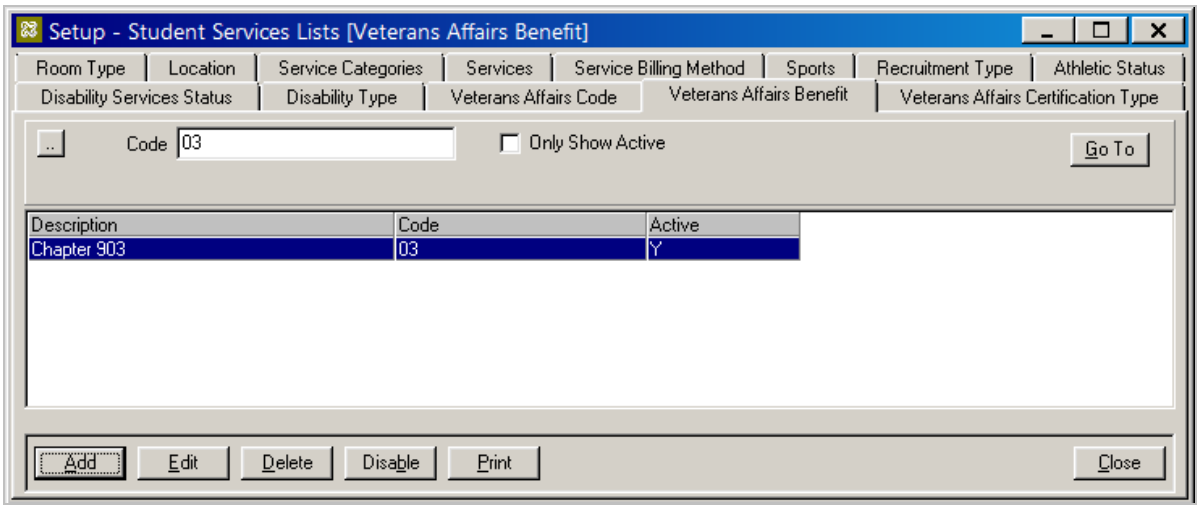
7. Specify a unique **Code**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Enter a **Description**.
10. Select one or more **Campuses**.
11. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. You are returned to the Setup - Student Services Lists [Sports] form.

Setup - Student Services Lists [Veterans Affairs Benefit]

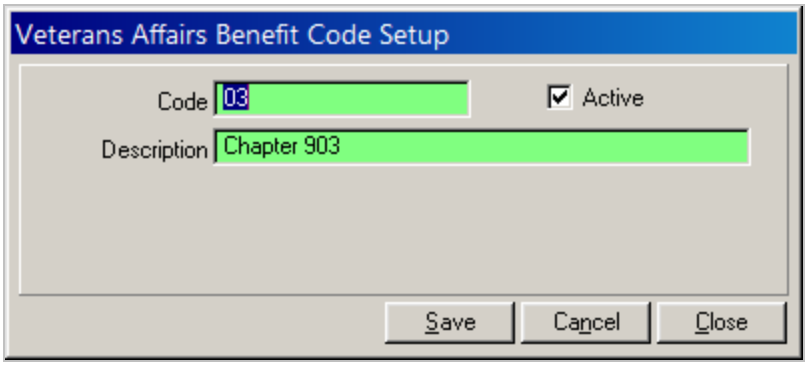
Use the Veterans Affairs Benefit tab of the Setup - Student Services Lists form to create a list of veteran affairs benefit codes.

To add or edit a list of veterans affairs benefit codes:

1. Navigate to **Lists** > **Student Services**. The Setup - Student Services Lists form is displayed.
2. Select the **Veterans Affairs Benefit** tab.



3. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Veterans Affairs Benefit Code Setup form is displayed.



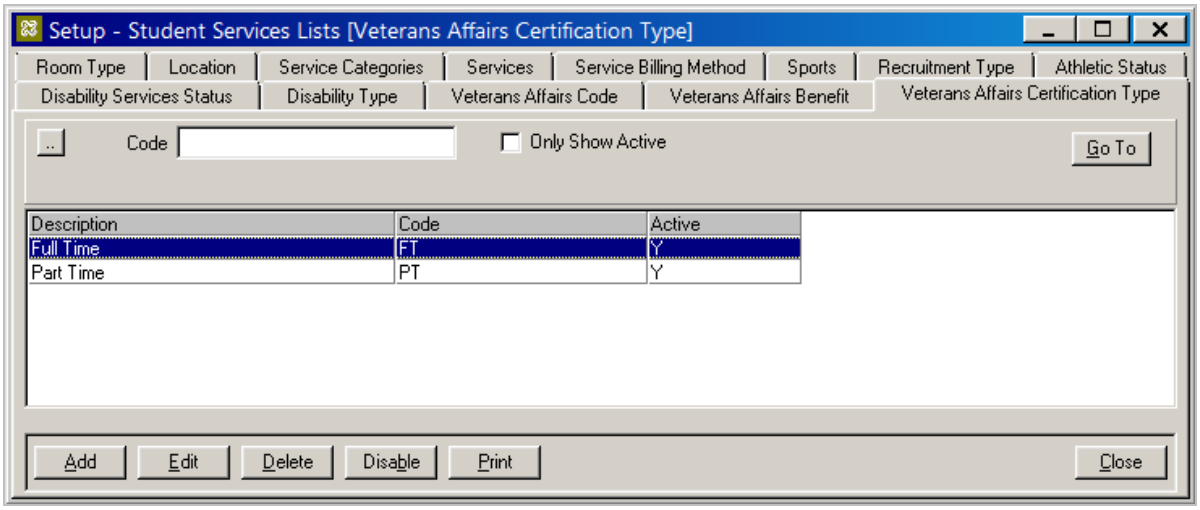
6. Specify a unique **Code**.
7. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
8. Enter a **Description**.
9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Student Services Lists [Veterans Affairs Certification Type]

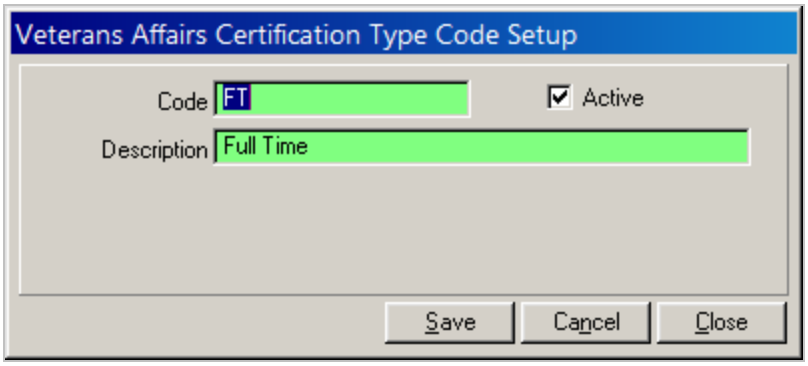
Use the Veterans Affairs Certification Type tab of the Setup - Student Services Lists form to create a list of veteran affairs certification type codes.

To add or edit a list of veterans affairs certification type codes:

1. Navigate to **Lists** > **Student Services**. The Setup - Student Services Lists form is displayed.
2. Select the **Veterans Affairs Certification Type** tab.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Veterans Affairs Certification Type Code Setup form is displayed.



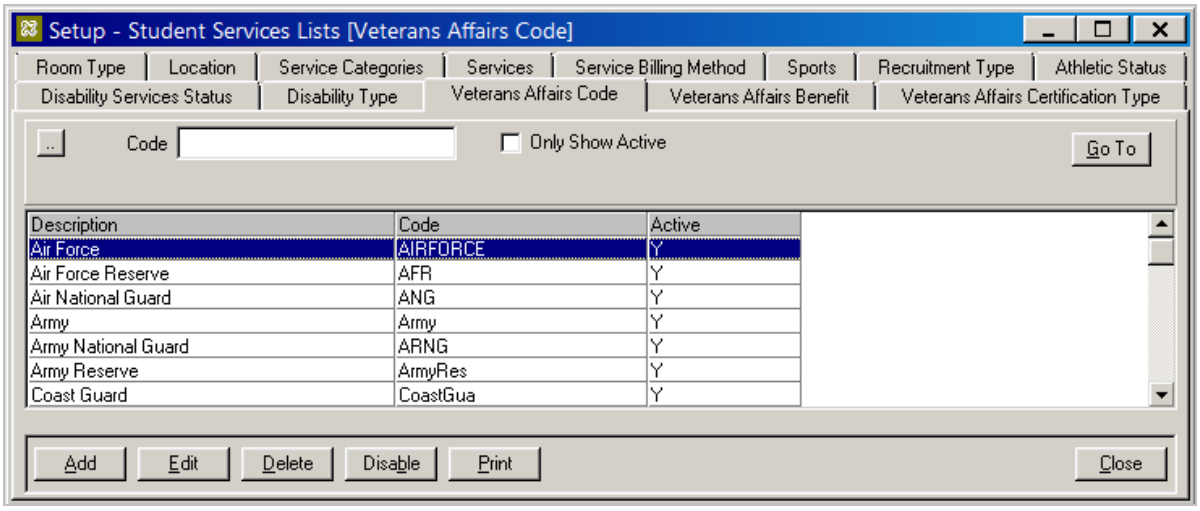
6. Specify a unique **Code**.
7. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
8. Enter a **Description**.
9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup - Student Services Lists [Veterans Affairs Code]

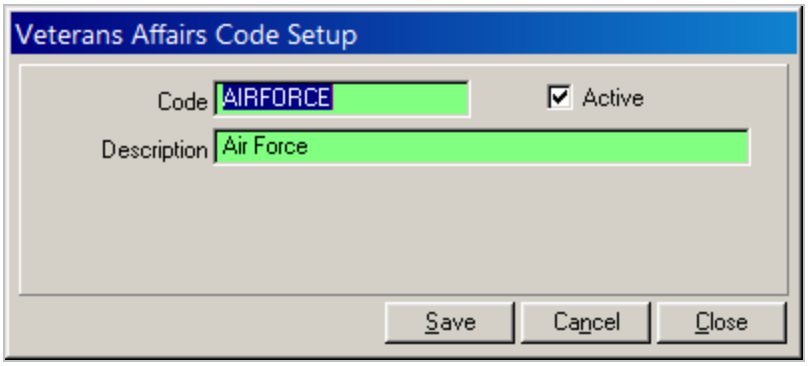
Use the Veterans Affairs Code tab of the Setup - Student Services Lists form to create a list of veteran affairs codes.

To add or edit a list of veterans affairs codes:

1. Navigate to **Lists** > **Student Services**. The Setup - Student Services Lists form is displayed.
2. Select the **Veterans Affairs Code** tab.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Veterans Affairs Code Setup form is displayed.



6. Specify a unique **Code**.
7. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
8. Enter a **Description**.
9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Lists > Housing

The Housing module is used to track information related to student housing. Users can not only manage housing locations, room types, and housing assistance information for students, but also track all the housing facilities available to institutions and concurrently manage the applications, allocation, and billing of housing services using the Housing module. Housing applications (defined by campus), room assignments, financial transactions including deposits and application of deposit fees, cross campus housing requests, and necessary reporting requirements are supported.

To set up data for the housing services offered by your institution, navigate to Lists > Housing. The Setup - Housing Lists form is displayed. Add, edit, delete, enable, disable, and print Housing lists from the following tabs:

- Application
- Building
- Building Categories
- Housing Amenities
- Housing Dates
- Room Categories
- Suite Categories

See Maintaining Lists for instructions on adding, editing, deleting, disabling, enabling, and printing lists.

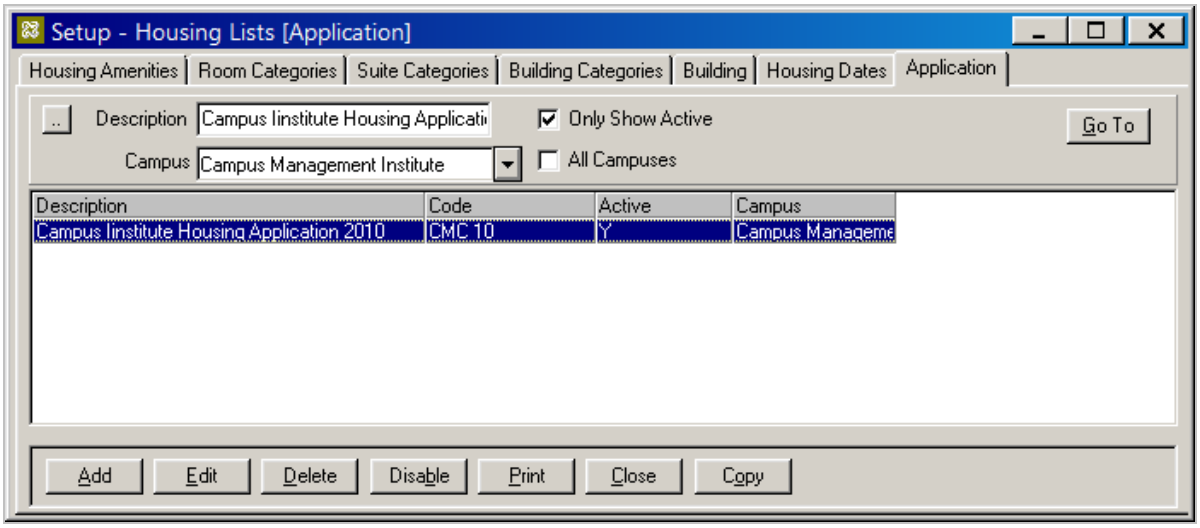
Setup - Housing Lists [Application]

Use the Application tab of the Setup - Housing Lists form to maintain applications that the students seeking housing facilities can use to apply for housing. You can perform the following tasks from the Application tab:

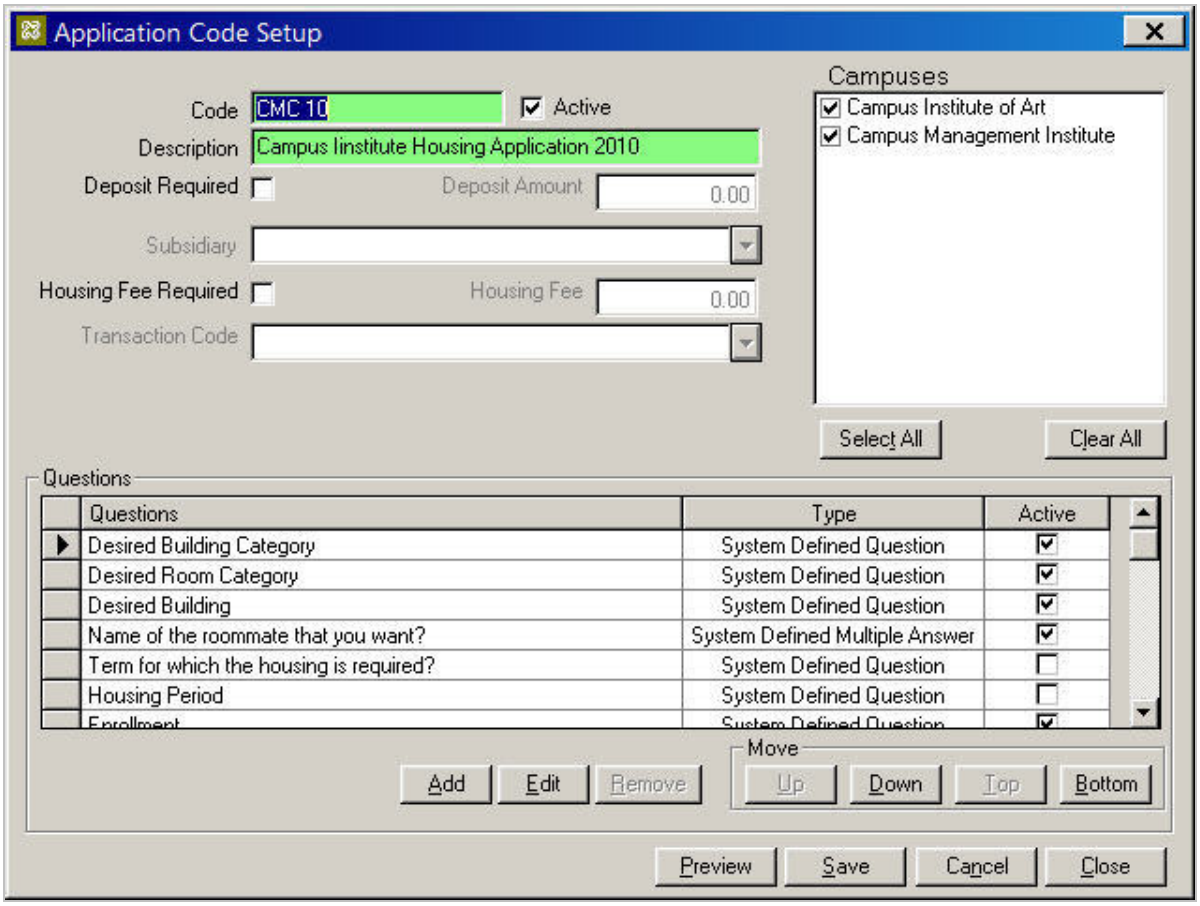
- Add or edit a housing application
  - Edit system defined questions
  - Add questions to a housing application
- Preview or print a housing application
- Copy a housing application
- Print a list of housing applications

To add or edit a list of housing application codes:

1. Navigate to **Lists** > **Housing**. The Setup - Housing Lists form is displayed.
2. Select the **Application** tab .



3. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Application Code Setup form is displayed.



7. Specify a unique **Code**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Enter a **Description**.
10. If a student needs to provide a deposit fee with the application, select **Deposit Required** and specify the **Deposit Amount**.
11. Select the **Subsidiary** to which the deposit is applied. Subsidiaries must be set up previously.
12. If a student needs to provide a housing fee with the application, select **Housing Fee Required** and specify the amount in the **Housing Fee** field.
13. Select the **Transaction Code** to which the housing fee is applied. Transaction Codes must be set up previously.
14. Select **Housing Fee Subsidiary** from the list of subsidiaries with which the selected transaction code is associated. This field is populated when the transaction code selected for Housing Fee is associated with subsidiary.
15. Select the **Campuses** associated with this housing application.

    Note: Only one active application can be associated with a campus.
16. The **Questions** frame lists questions that appear on the application form.

    When a housing application is added, **System Defined Questions** appear in the list of questions. This question type includes the following questions:

- Desired Building Category *
- Desired Room Category *
- Desired Building *
- Name of roommate that you want *
- Term for which housing is required
- Housing Period
- Enrollment *
- Academic Year for which housing is required

Note: Items with an asterisk (*) default to an active status.

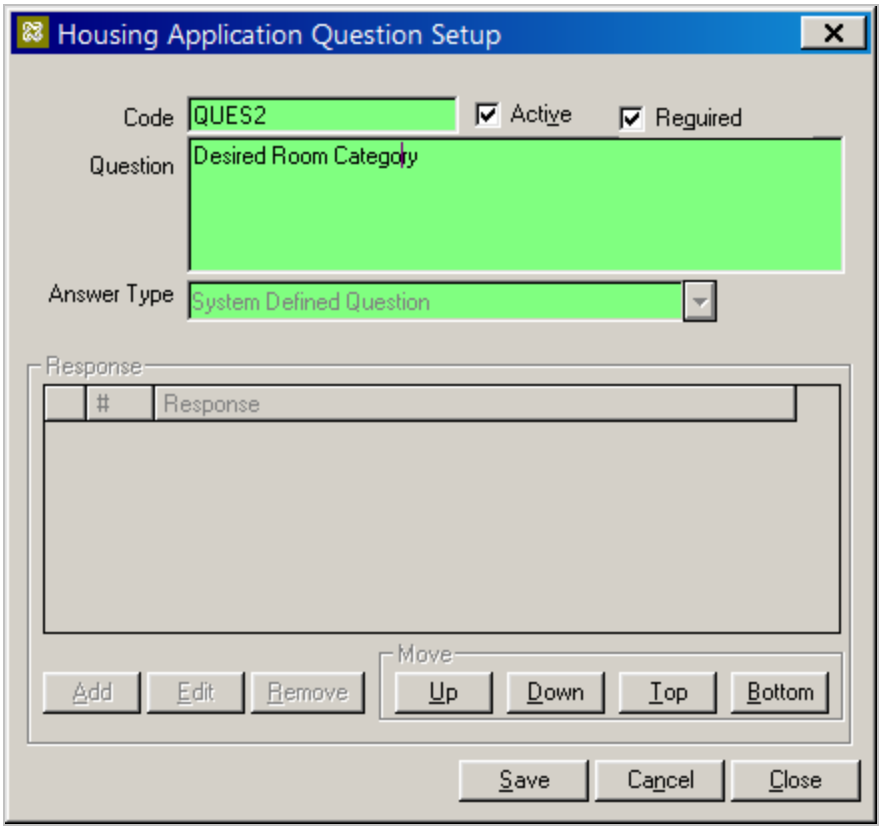
Only questions whose associated **Active** check box is selected are displayed to students as they fill in the application. Each question has list boxes or radio buttons populated with information contained in the CampusNexus Student database. For example, the questions pertaining to the Building Category, Room Category, and Building containing entries entered under Lists > Housing for Building Categories, Building, and Rooms. Other items, such as the Required Term or Academic Year questions, use information contained in the student's record. The Enrollment list is populated with the default enrollment.

Important: Only one of the questions relating to the time period when the student will require housing must be set to an active status. One of the "Academic Year", "Housing Period", or "Term" questions must be active. If the "Academic Year" question is active, the "Enrollment" question is automatically active.

Note: When selecting Academic Year based application, rooms must be defined with a billing frequency other than Term (e.g., Daily, Monthly).

To edit system defined questions:

a. Select a question and click **Edit**. The Housing Application Question Setup form is displayed.



b. Specify a unique **Code**.

c. Enter the text of the **Question**.

d. Select or clear the **Active** check box to designate the record as active or inactive, respectively.

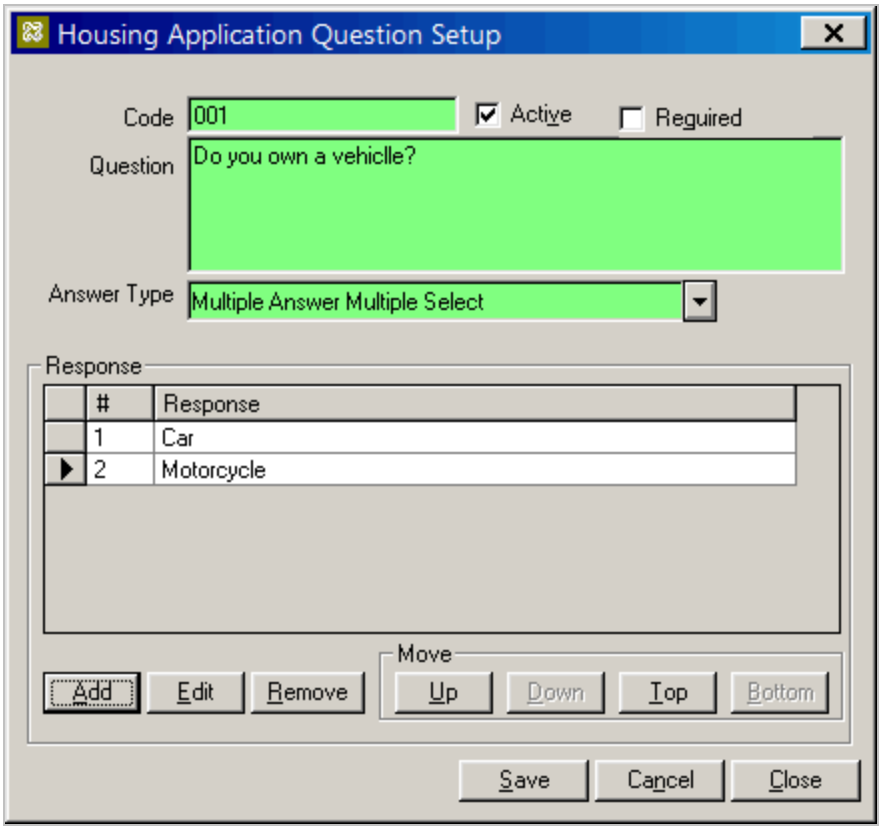
e. Select **Required** if you want to the question to be mandatory.

f. The Answer Type and Response fields are system defined and cannot be edited.

g. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

To add questions to the housing application:

a. Click **Add** in the Questions field of the Application Code Setup form. The Housing Application Question Setup form is displayed.



b. Specify a unique **Code**.

c. Select or clear the **Active** check box to designate the record as active or inactive, respectively.

d. Select **Required** if you want to the question to be mandatory.

e. Enter the text of the question in the **Question** field.

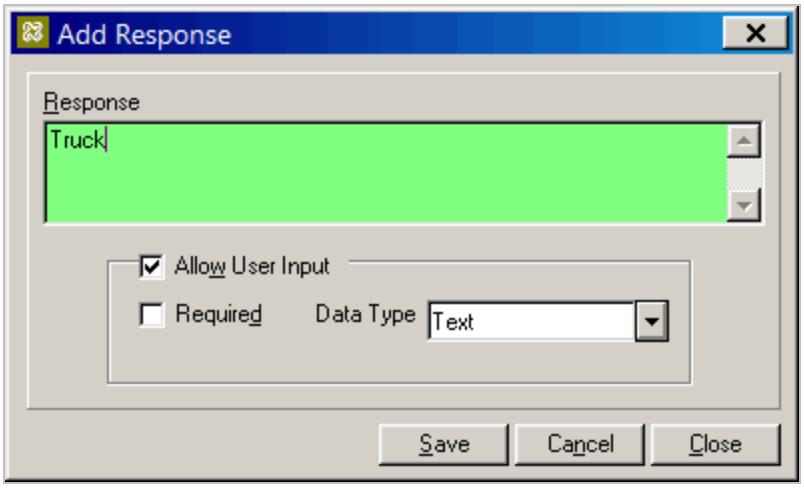
f. Select the **Answer Type**. The answer types available are:

- Multiple Answer Multiple Select
- Multiple Answer Single Select
- Text

- True/False
- Yes/No

g. Click **Save**. The Response frame is activated after you save the question. This field is activated only for Multiple Answer Multiple Select and Multiple Answer Single Select answer types.

h. If you selected **Multiple Answer Multiple Select** or **Multiple Answer Single Select** as the answer type, click **Add** in the Response frame to add the response options for the question. The Add Response form is displayed.



i. Add the response text in the **Response** field. The response is an option that the student can select on the application.

j. Select **Allow User Input** if you want the user to be able to provide more information related to the response you have provided.

k. Select the **Data Type**. The options available are:

- Date
- Integer
- Text

l. Select **Required** if you want the user response to be a required field in the housing application.

m. Click **Save**.

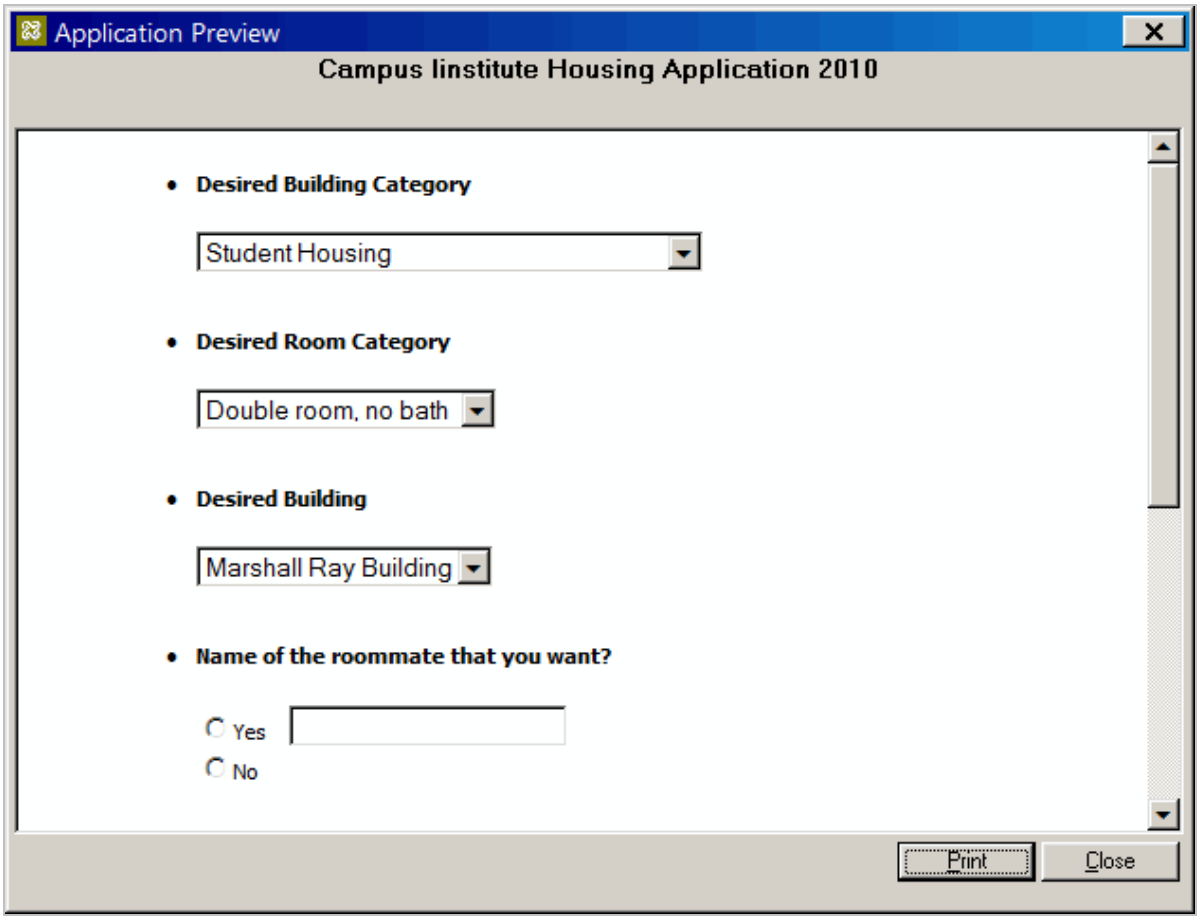
n. Repeat the preceding steps to add more response options for the **Multiple Answer Multiple Select** or **Multiple Answer Singe Select** answer types.

o. The added responses appear in the Response list in the Housing Application Question Setup form. Use the **Up**, **Down**, **Top**, and **Bottom** buttons to change the order of the responses in the application.

p. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

To preview or print a housing application:

1. Click **Preview** on the Application Setup form, or select an application from the Setup - Housing Lists [Application] tab and click **Print**. The Application Preview form is displayed. Only questions that are saved with the status 'Active' are displayed in the preview.



2. Click the **Print** button on the Application Preview form.
3. Click **Close** to close the form.

To copy a housing application:

1. On the Setup - Housing Lists [Application] tab, select the housing application to copy , and click **Copy**.
2. Specify a unique **Code**.
3. Click **OK** to copy the application.
4. The status of the copied application is 'inactive' by default. Clear the **Only Show Active** check box on the Application tab (in case it is enabled) to view the copied application in the list.

   Note: There cannot be more than one active application related to a campus.
5. To edit the copied application, select the application and click **Edit**, specify your changes, and click **Save**.

To print a list of housing applications:

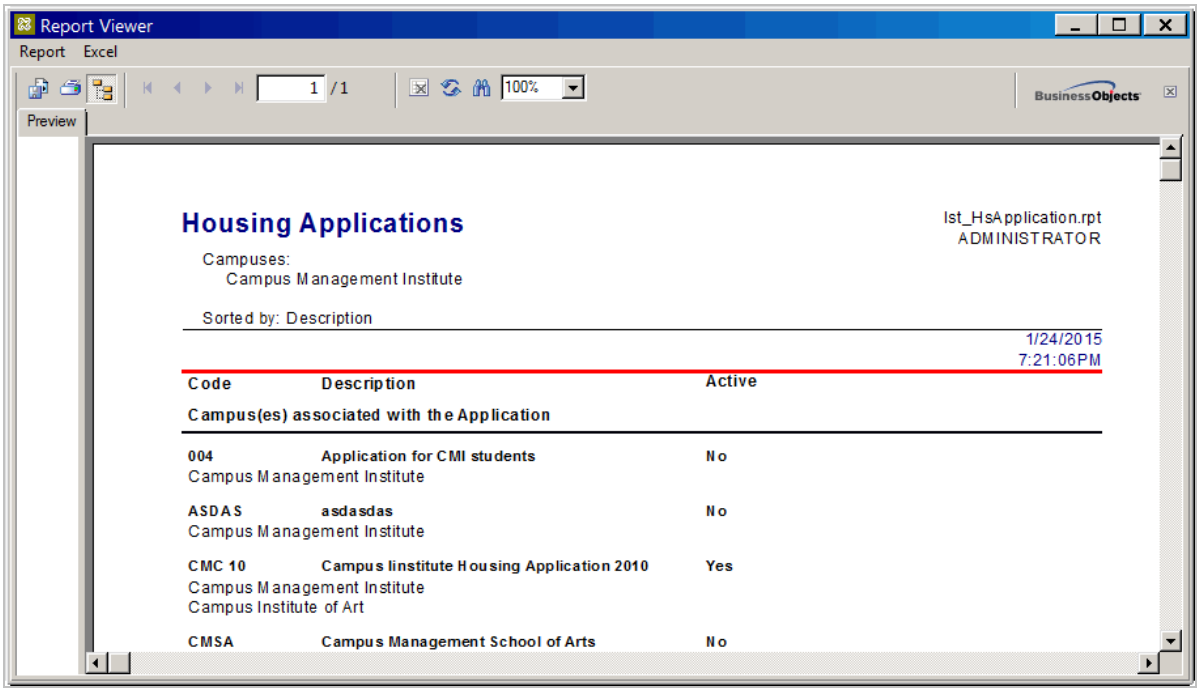
1. On the Setup - Housing Lists [Application] tab, click **Print**. The Report Selection form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

Select or clear **Yes** or **No** next to the Active label. If you select Yes, active records are listed on the report. If you select No, inactive records are listed. If you select both, active and inactive records are listed.

If no records match the selection criteria, the message *"No records selected for the report"* is displayed.

Sort the Housing Applications report by **Code** or **Description**.

4. Click **Preview**. The report is assembled and displayed in the Report Viewer. The report contains the Code, Description, and Active indicator.



5. See Report Viewer for instructions on printing or exporting the report.

Setup - Housing Lists [Building]

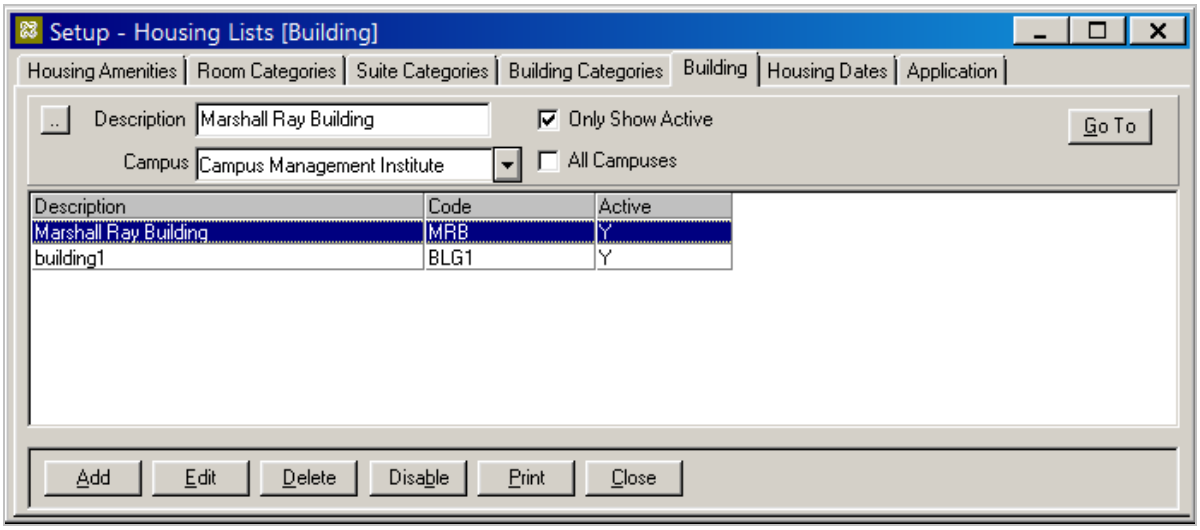
Use the Building tab of the Setup - Housing Lists form to maintain the details of buildings for student housing. A building is a collection of rooms or suites, or both. Using this tab you can associate suites and rooms, and the details of these, with a building.

You can perform the following tasks from the Building tab:

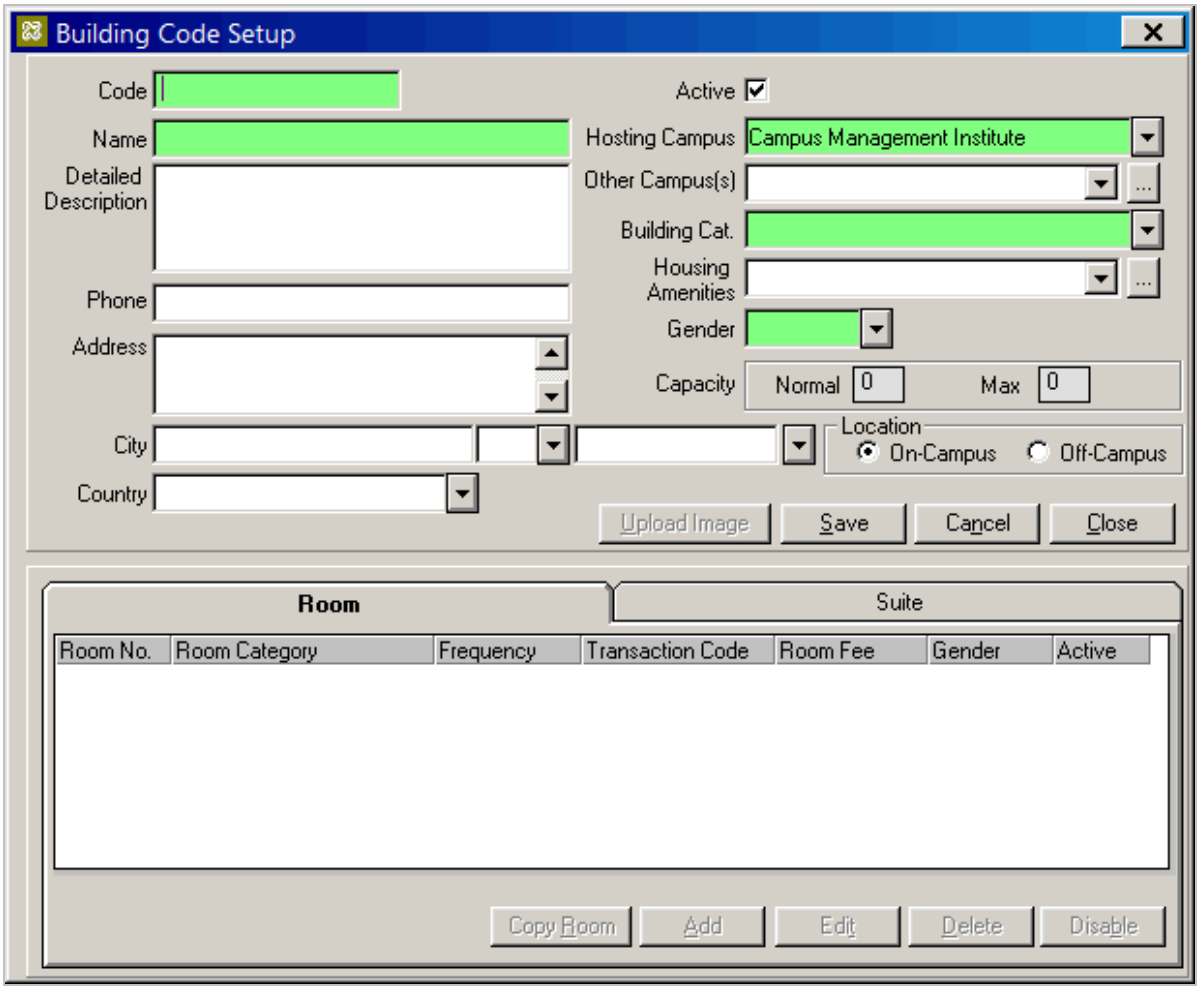
- Add or edit a building
- Associate suites with buildings and add rooms to a suite
- Associate rooms with buildings
- Delete a building
- Disable or enable a building
- Print a list of the buildings

To add or edit a list of building codes:

1. Navigate to **Lists** > **Housing**. The Setup - Housing Lists form is displayed.
2. Select the **Building** tab.



3. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Building Code Setup form is displayed.



7. Specify appropriate options. For more information, see Field Descriptions.
8. Click **Save**.

Note: The Add, Edit, and Delete buttons on the Building Code Setup form are enabled after the building details are saved.

Field Descriptions

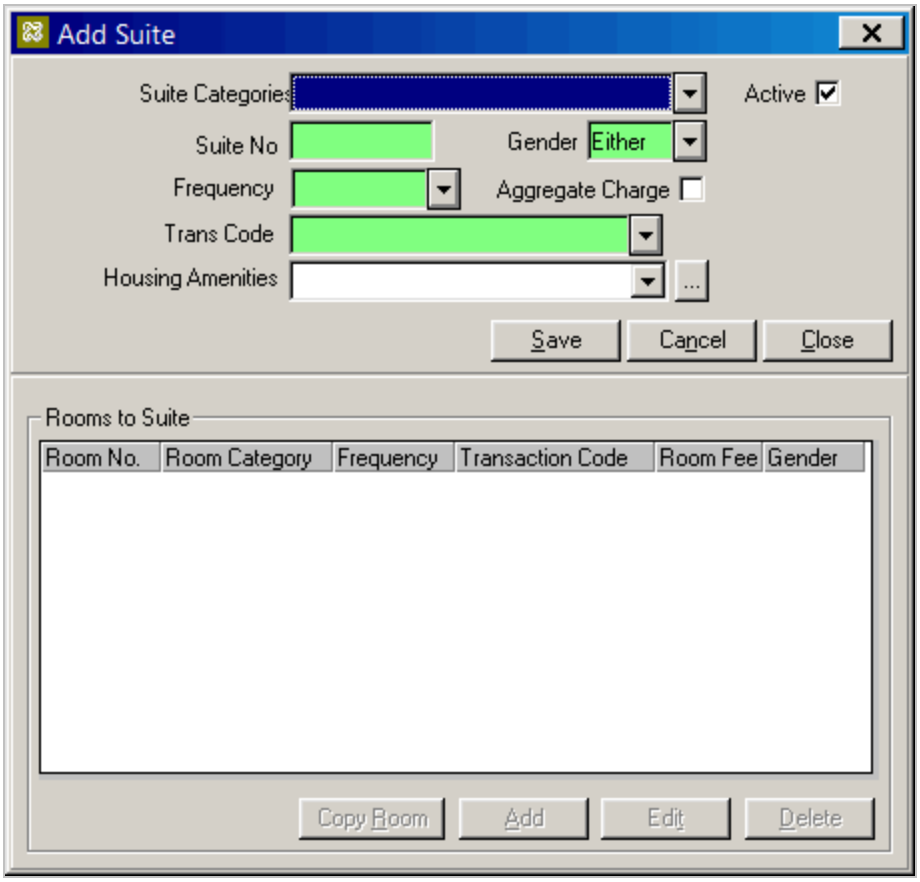
Field	Description
Code	Code of the building.
Active	Select or clear the Active check box to designate the record as active or inactive.
Name	Name of the building.
Detailed Description	Detailed description of the building.
Building Category	Building category for the building.
Address	Address of the building.
City	City where the building is located - State - ZIP code

Field	Description
Country	Country where the building is located.
Hosting Campus	Campus to which the building is associated.
Other Campuses	Select the campus from where student will also have access to the building. Click ... to select multiple campuses.
Housing Amenities	Housing amenities available in the building. Click ... to select multiple amenities.
Gender	Gender of the students to be accommodated in the building. The options are: • Co-ed • Either • Female • Male.
Phone	Telephone number of the building.
Location	Location of the building, On-Campus or Off-Campus.
Capacity	The Normal and Maximum fields are calculated fields. The value is 0 at form load and is updated when suites and/or rooms are added to the building.

To associate suites with buildings:

Before associating suites with buildings, suite categories must be set up under Lists > Housing > Suite Categories.
Before associating rooms with suites, room categories must be set up under Lists > Housing > Room Categories .

1. Select the **Suite** tab on the Building Code Setup form and click **Add**. The Add Suite form is displayed.



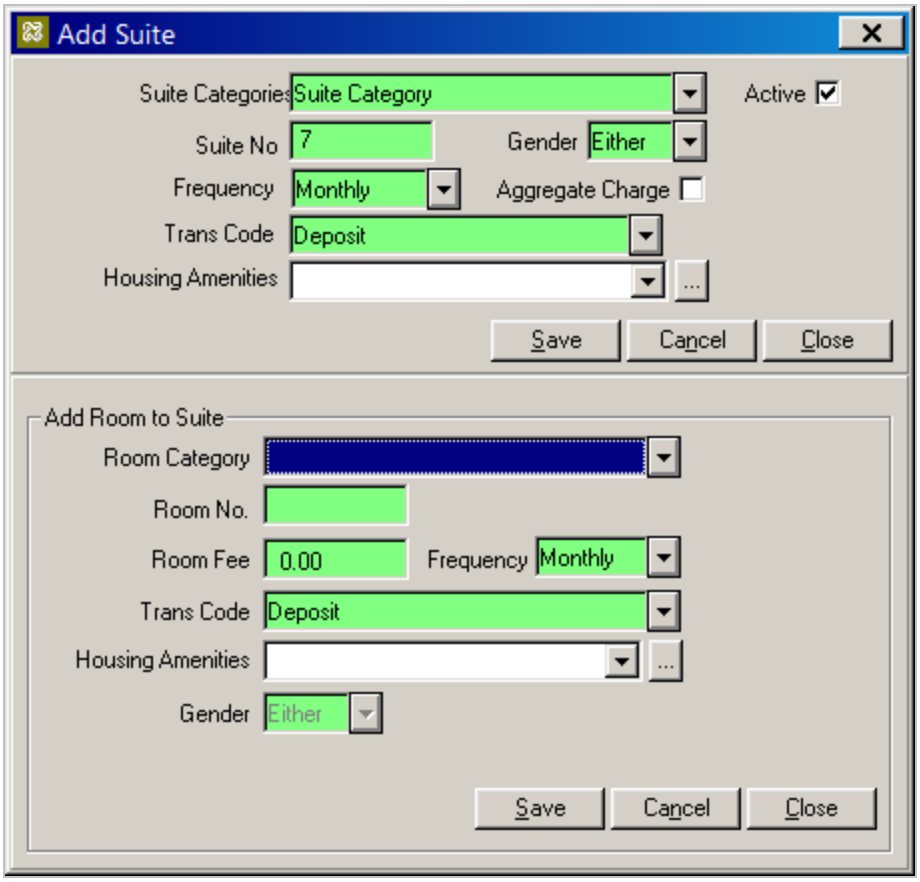
2. Select the **Suite Category**.
3. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
4. Specify the **Suite No**.
5. The **Gender** field is populated with the gender selected for the building. This field is editable if you selected **Co-ed** or **Either** as the gender for the building.
6. By default, the **Housing Amenities** field is populated with the housing amenities selected for the building; however, you can update the selection of amenities.
7. Click **Save**.

   Note: The Add, Edit, and Delete buttons on the Add Suite form are enabled after the suite category details are saved.

To add rooms to a suite

Transaction Codes and Housing Amenities must be set up before adding rooms to the suite.

a. Click **Add** on the Add Suite form. The Add Room to Suite frame replaces the Rooms to Suite frame.



b. Select the **Room Category**.

c. When you select a Room Category, the fields for **Room Fee**, **Frequency**, **Trans Code**, and **Housing Amenities** are populated with the values (if any) saved for the category in the room category master. You can change the information in these fields.

d. Specify the **Room No**.

e. The **Gender** field is populated with the gender selected for the building. This field is editable if you selected **Co-ed** or **Either** as the gender for the building.

f. Click **Save**. The added room is now displayed in the Rooms to Suite list in the Add Suite form.

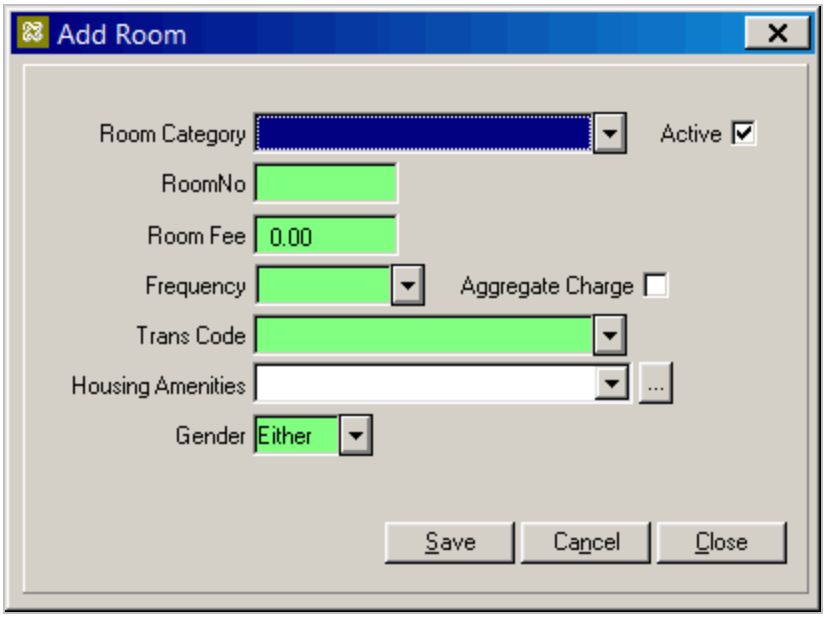
g. Click **Close** to close the form. The added suite is now displayed in the Suite list in the Building Code Setup form.

To associate rooms with buildings:

A building may contain rooms that are not part of suites. Use the following steps to associate rooms with buildings.

Before adding a room, room categories must be set up under Lists > Housing > Room Categories.

1. Select the **Room** tab on the Building Code Setup form and click **Add**. The Add Room form is displayed.



2. Select the **Room Category**.
3. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
4. Specify the room number in the **Room No**. field.
5. Specify the **Room Fee** (in numbers) for the room.
6. Select how often the student pays the room fee from the **Frequency** list.
7. Select the general ledger transaction code from the **Trans Code** list.
8. Select the **Housing Amenities** associated with the room.
9. The **Gender** field is populated with the gender selected for the building. This field is editable if you selected **Co-ed** or **Either** as the gender for the building.
10. Click **Save**. A new Add Room form is displayed where you can associate another room with the building.
11. Click **Close** to close the form. The added room is now displayed in the Room list in the Building Code Setup form.

To delete a building:

Click **Delete** on the Setup - Housing Lists [Building] tab.

To disable or enable a building:

The Disable/Enable buttons toggle, depending on whether the selected record is active or not.

- When you click **Disable**, an 'N' appears in the Active field to indicate that the record is inactive.
- When you click **Enable**, a 'Y' appears in the Active field to indicate that the record is active.

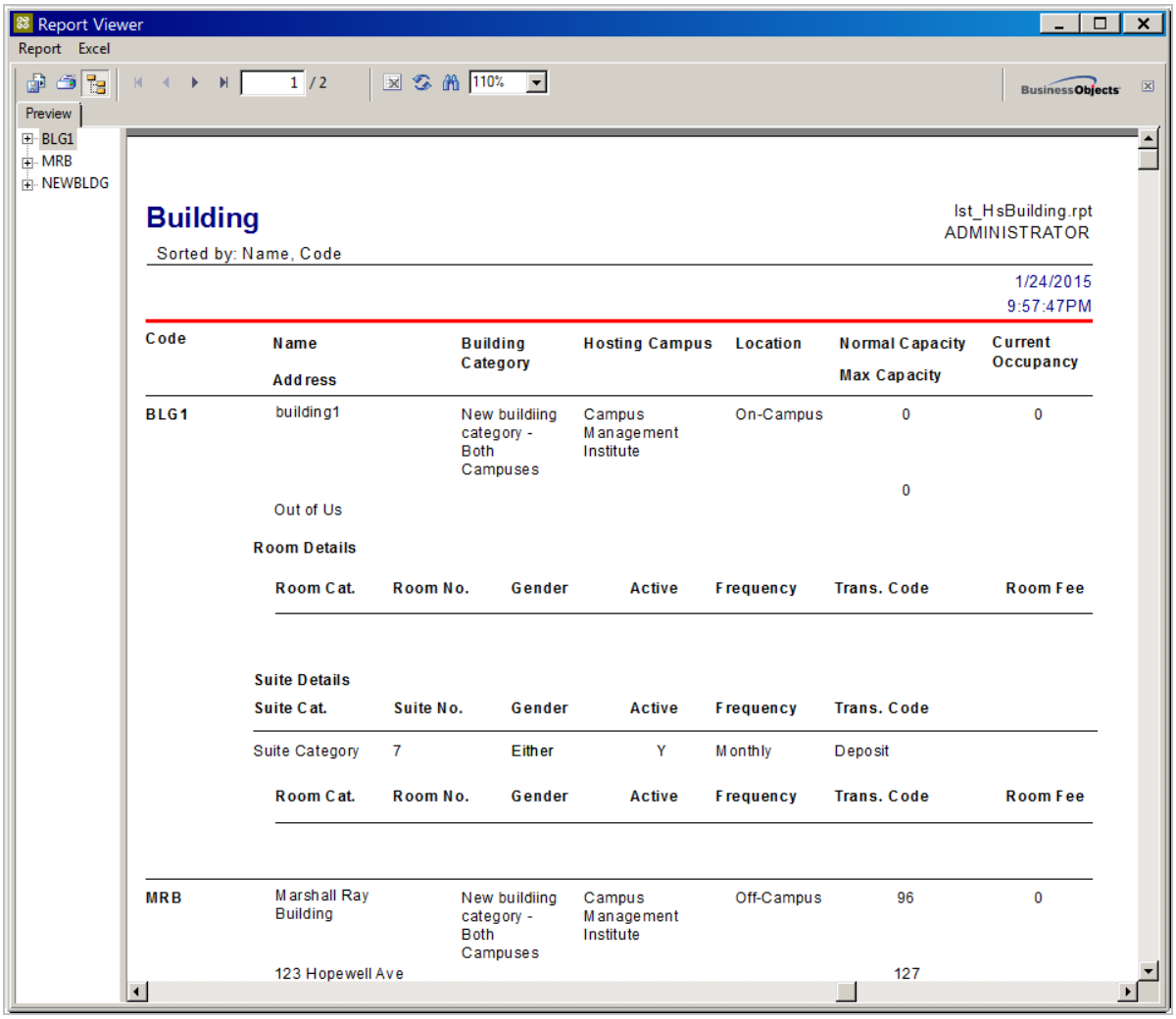
To print a list of buildings:

1. On the Setup - Housing [Building] tab, click **Print**. The Report Selection form is displayed.
2. Select or clear **Yes** or **No** next to the Active label. If you select Yes, active records are listed on the report. If you

select No, inactive records are listed. If you select both, active and inactive records are listed.

If no records match the selection criteria, the message *"No records selected for the report"* is displayed.

3. Click **Preview**. The report is assembled and displayed in the Report Viewer. The report contains the building code, name and address, category, hosting campus, location, normal capacity, current occupancy, max capacity, and Active indicator. The room and suite information is listed for each building and indicates whether the rooms or suites are active.



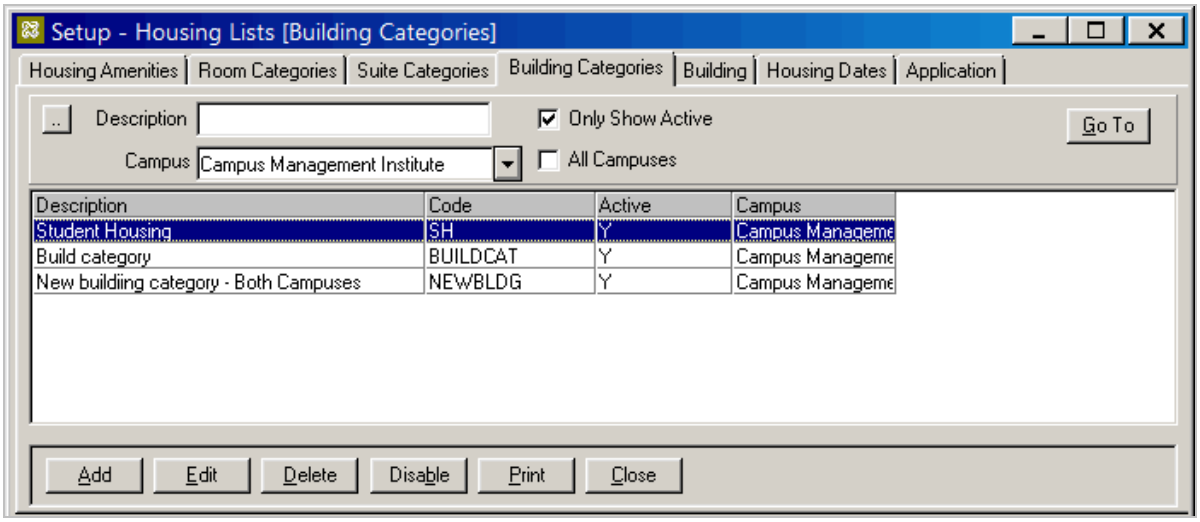
4. See Report Viewer for instructions on printing or exporting the report.

Setup - Housing Lists [Building Categories]

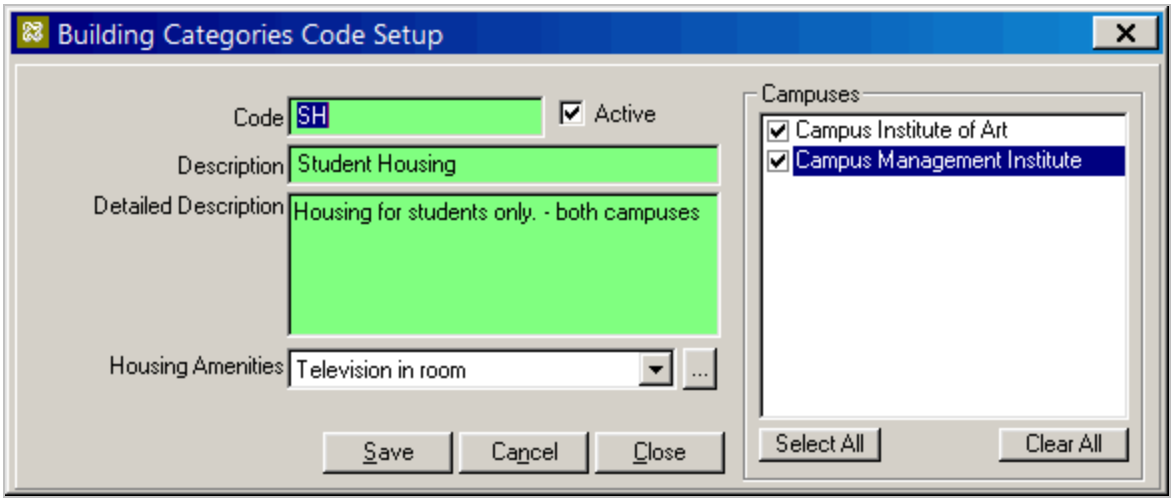
Use the Building Categories tab of the Setup - Housing Lists form to classify the buildings available for student housing into various categories.

To add or edit a list of building category codes:

1. Navigate to **Lists** > **Housing**. The Setup - Housing Lists form is displayed.
2. Select the **Building Categories** tab.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Building Categories Code Setup form is displayed.



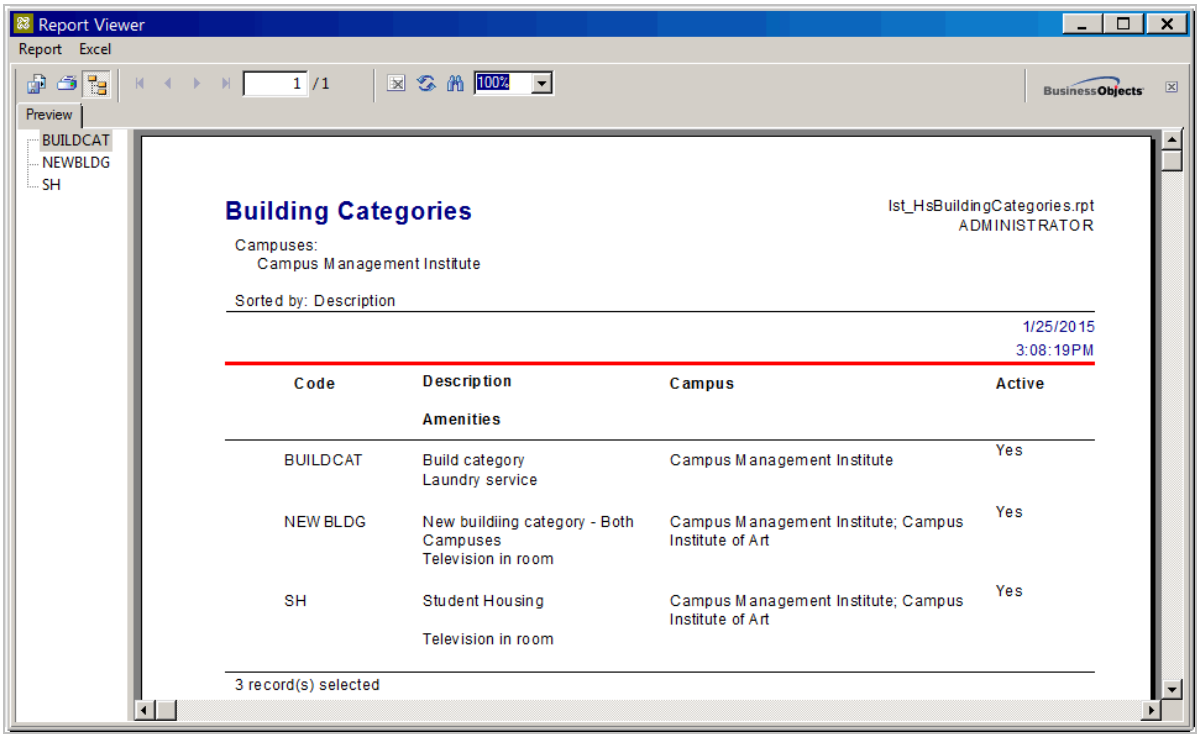
7. Specify a unique **Code**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Enter a **Description**.
10. Specify a **Detailed Description**.
11. Select the **Housing Amenities** available in the building category. Click ... to select multiple housing amenities.
12. Select the **Campuses** that use the building category.
13. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

To print a list of building categories:

1. Click **Print** on the Setup - Housing Lists [Building Categories] tab. The Report Selection form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Select or clear **Yes** or **No** next to the Active label. If you select Yes, active records are listed on the report. If you select No, inactive records are listed. If you select both, active and inactive records are listed.

   If no records match the selection criteria, the message *"No records selected for the report"* is displayed.
4. Click **Preview**. The report is assembled and displayed in the Report Viewer. The report contains the Code, Description, and Active indicator.



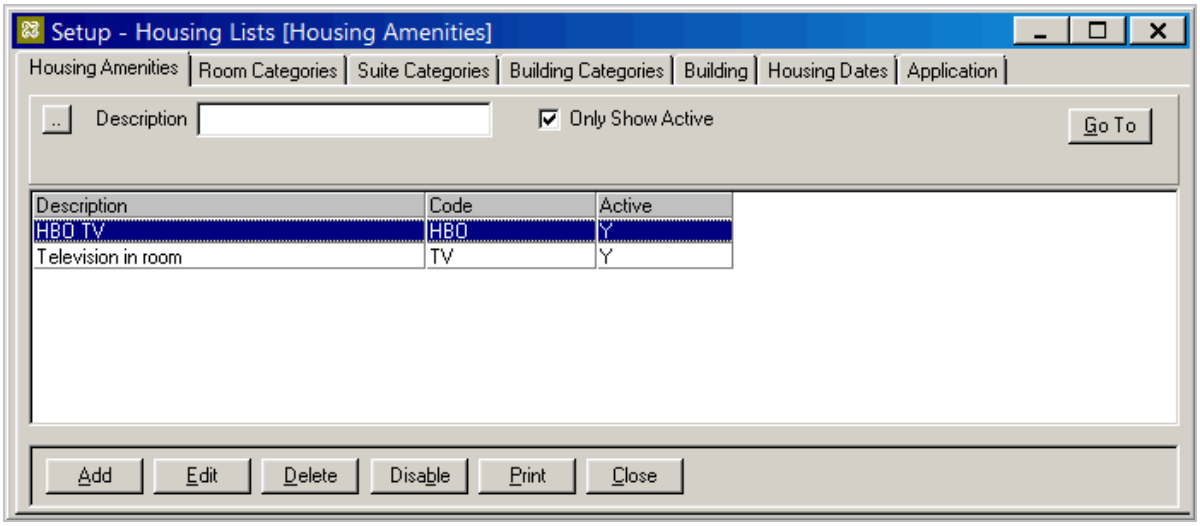
5. See Report Viewer for instructions on printing or exporting the report.

Setup - Housing Lists [Housing Amenities]

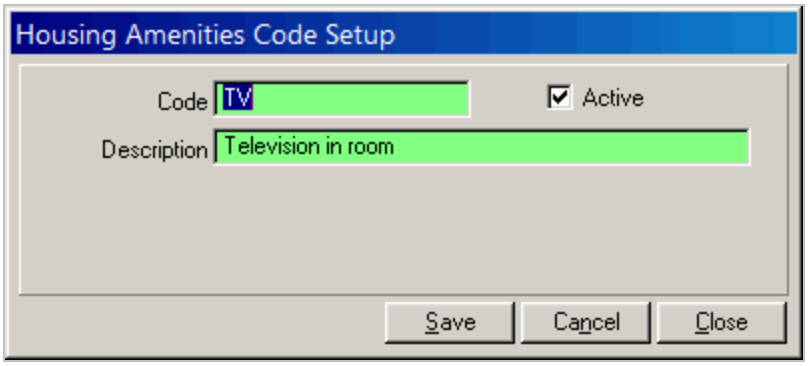
Use the Housing Amenities tab of the Setup - Housing Lists form to maintain a list of amenities in buildings, suites, or rooms available for student housing.

To add or edit a list of housing amenities codes:

1. Navigate to **Lists** > **Housing**. The Setup - Housing Lists form is displayed.
2. Select the **Housing Amenities** tab.



3. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select **Only Show Active** to view only active records. Clear this check box to view all records.
5. Click **Add**, or select a record and click **Edit**. The Housing Amenities Code Setup form is displayed.



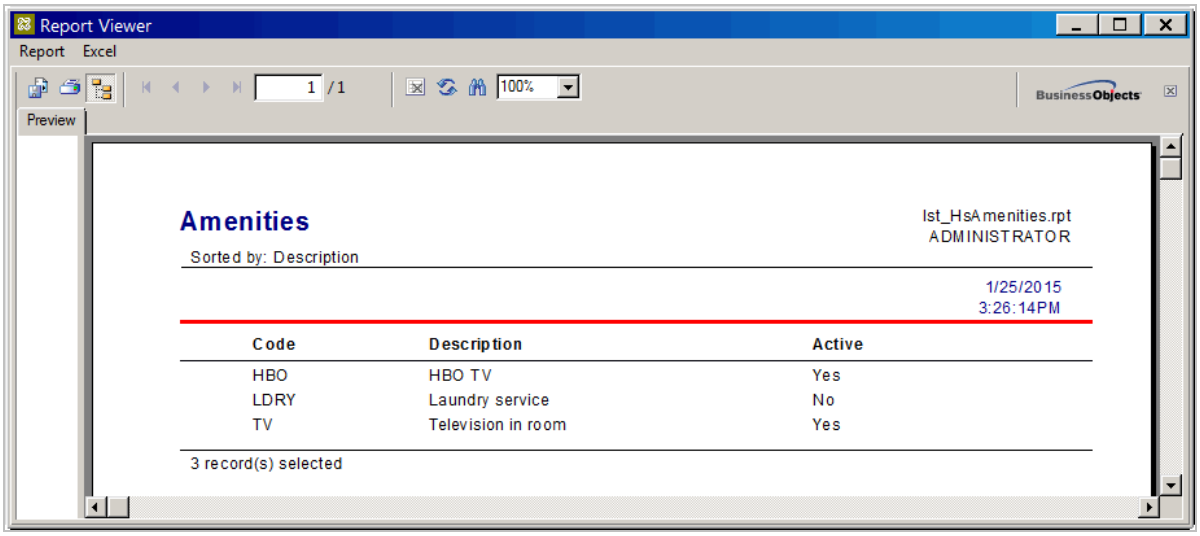
6. Specify a unique **Code**.
7. Enter a **Description**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

To print a list of housing amenities:

1. Click **Print** on the Setup - Housing Lists [Housing Amenities] form. The Report Selection form is displayed.
2. Select appropriate options on the Selection tab.

   Select or clear **Yes** or **No** next to the Active label. If you select Yes, active records are listed on the report. If you select No, inactive records are listed. If you select both, active and inactive records are listed.

   If no records match the selection criteria, the message *"No records selected for the report"* is displayed.
3. Click **Preview**. The report is assembled and displayed in the Report Viewer. The report contains the Code, Description, and Active indicator.



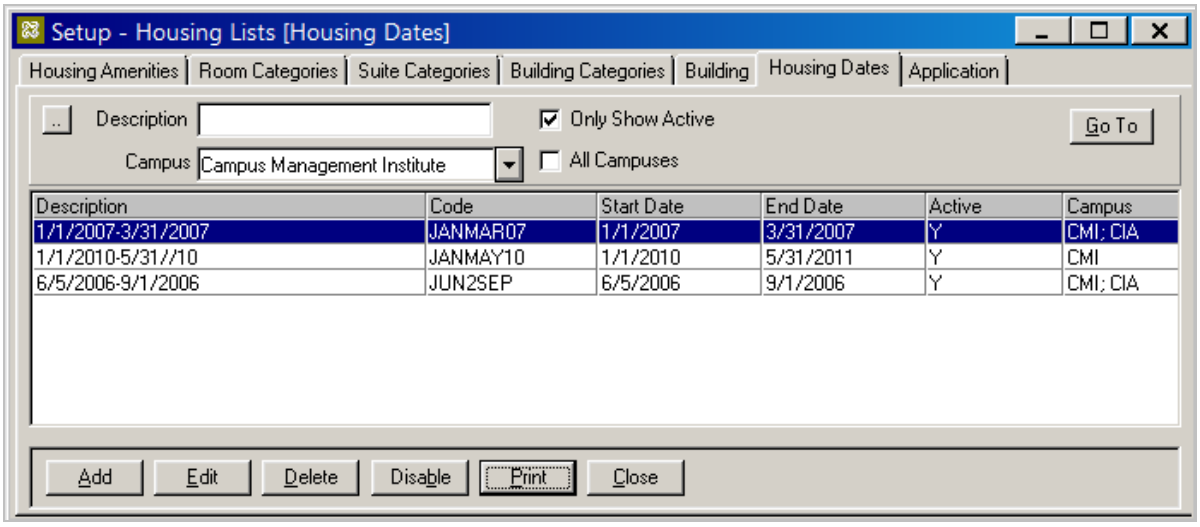
4. See Report Viewer for instructions on printing or exporting the report.

Setup - Housing Lists [Housing Dates]

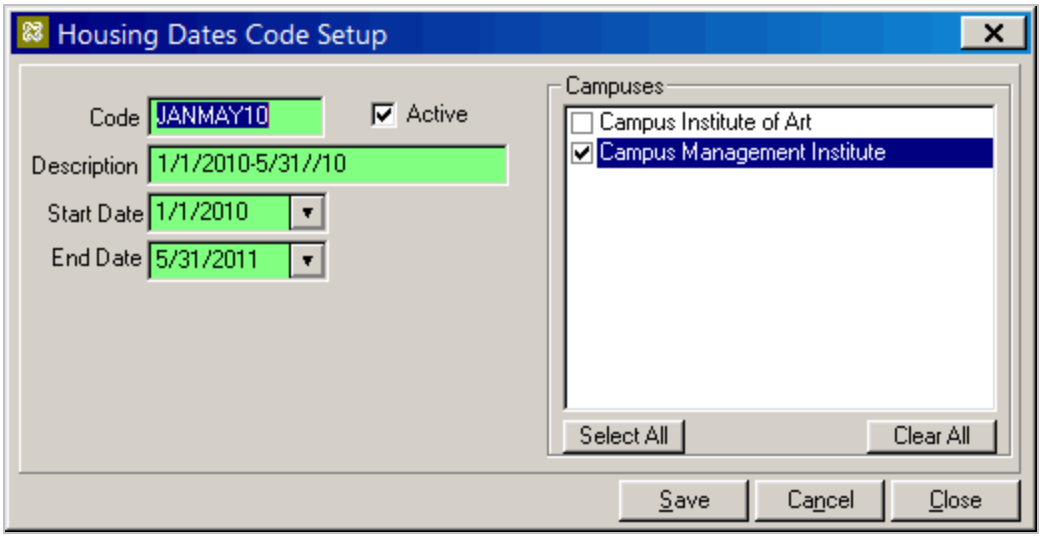
Use the Housing Dates tab of the Setup - Housing Lists form to view and define date ranges for housing. These date ranges are used in housing applications, roommate matching, and housing leases. The housing dates may be associated with a specific campus.

To add or edit a list of housing dates codes:

1. Navigate to **Lists** > **Housing**. The Setup - Housing Lists form is displayed.
2. Select the **Housing Dates** tab.



3. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Housing Dates Code Setup form is displayed.



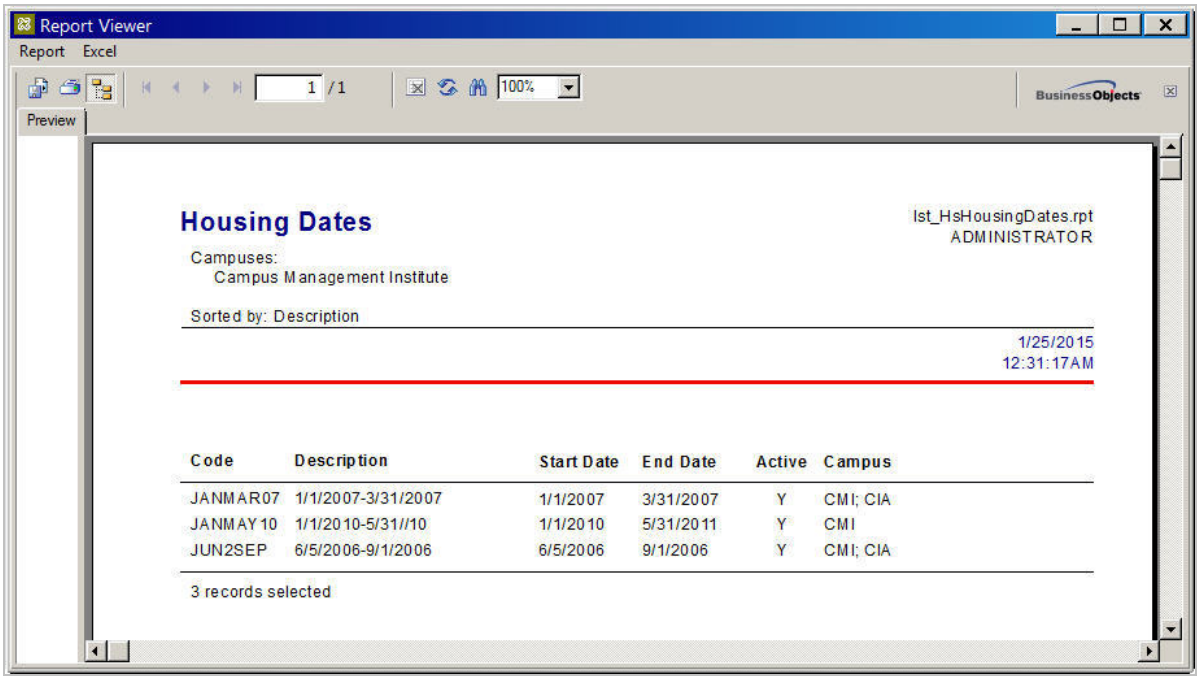
7. Specify a unique **Code**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Select the **Campuses** that will be associated with the housing dates.
10. Select the **Start Date** and **End Date** for the date range.
11. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

To print a list of housing dates:

1. Click **Print** on the Setup - Housing [Housing Dates] tab. The Report Selection form is displayed.
2. Select appropriate options on the Selection tab.

   Select or clear **Yes** or **No** next to the Active label. If you select Yes, active records are listed on the report. If you select No, inactive records are listed. If you select both, active and inactive records are listed.

   If no records match the selection criteria, the message *"No records selected for the report"* is displayed.
3. Click **Preview**. The report is assembled and displayed in the Report Viewer. The report contains the Code and Description for each Housing Date configured.



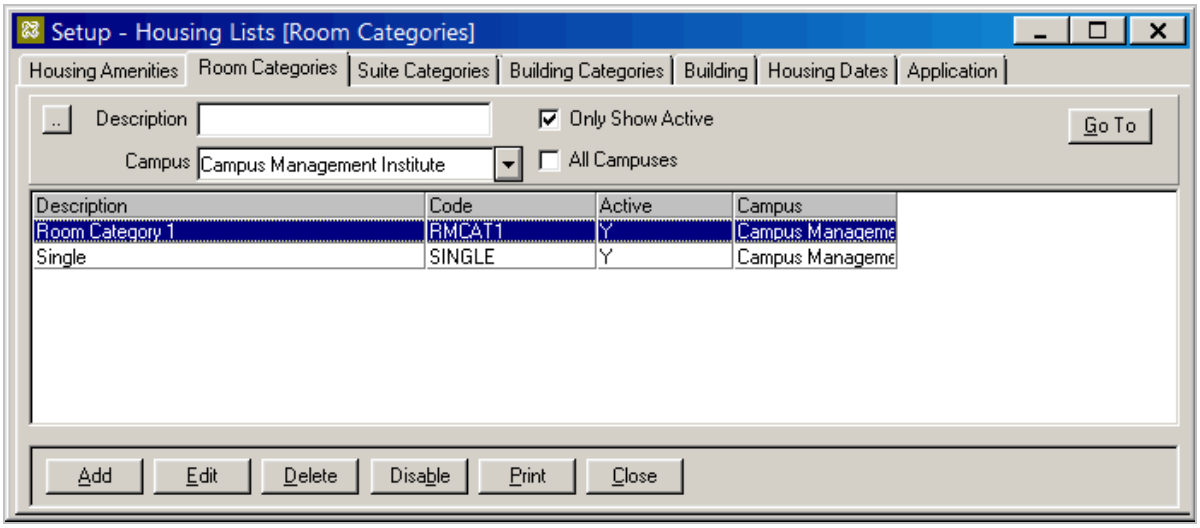
4. See Report Viewer for instructions on printing or exporting the report.

Setup - Housing Lists [Room Categories]

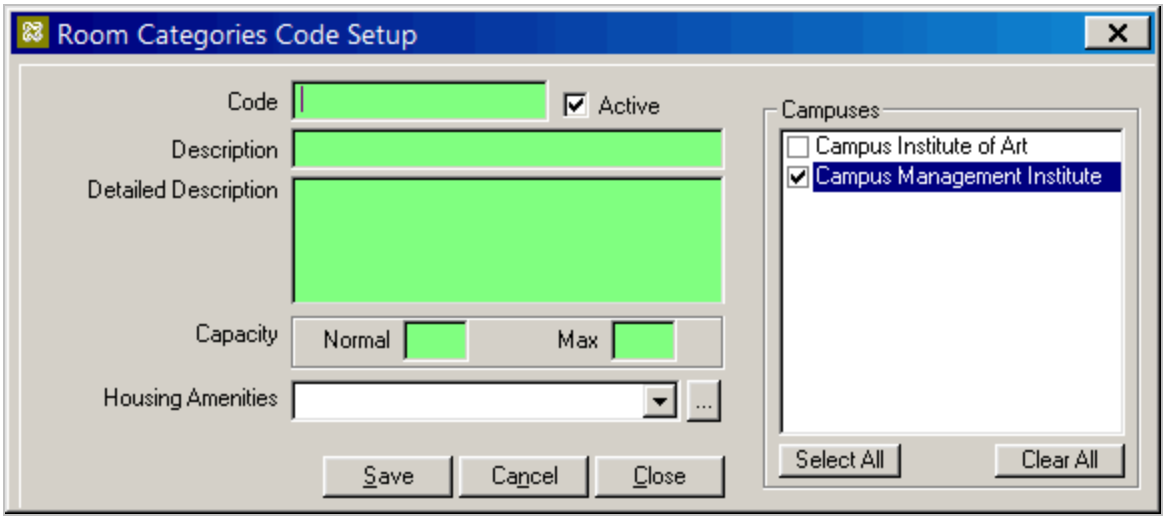
Use the Room Categories tab of the Setup - Housing Lists form to classify the rooms available for student accommodation into various categories.

To add or edit a list of room categories codes:

1. Navigate to **Lists** > **Housing**. The Setup - Housing Lists form is displayed.
2. Select the **Room Categories** tab.



3. Click ... to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Room Categories Code Setup form is displayed.



7. Specify a unique **Code**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Enter a **Description**.
10. Specify a **Detailed Description**.
11. Select the **Campuses** associated with the Room Category.
12. Enter the **Normal** and **Max** occupant **Capacity** of the room category.
13. Select the **Housing Amenities** available in the room category from the drop-down list. Click ... to select multiple housing amenities.
14. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

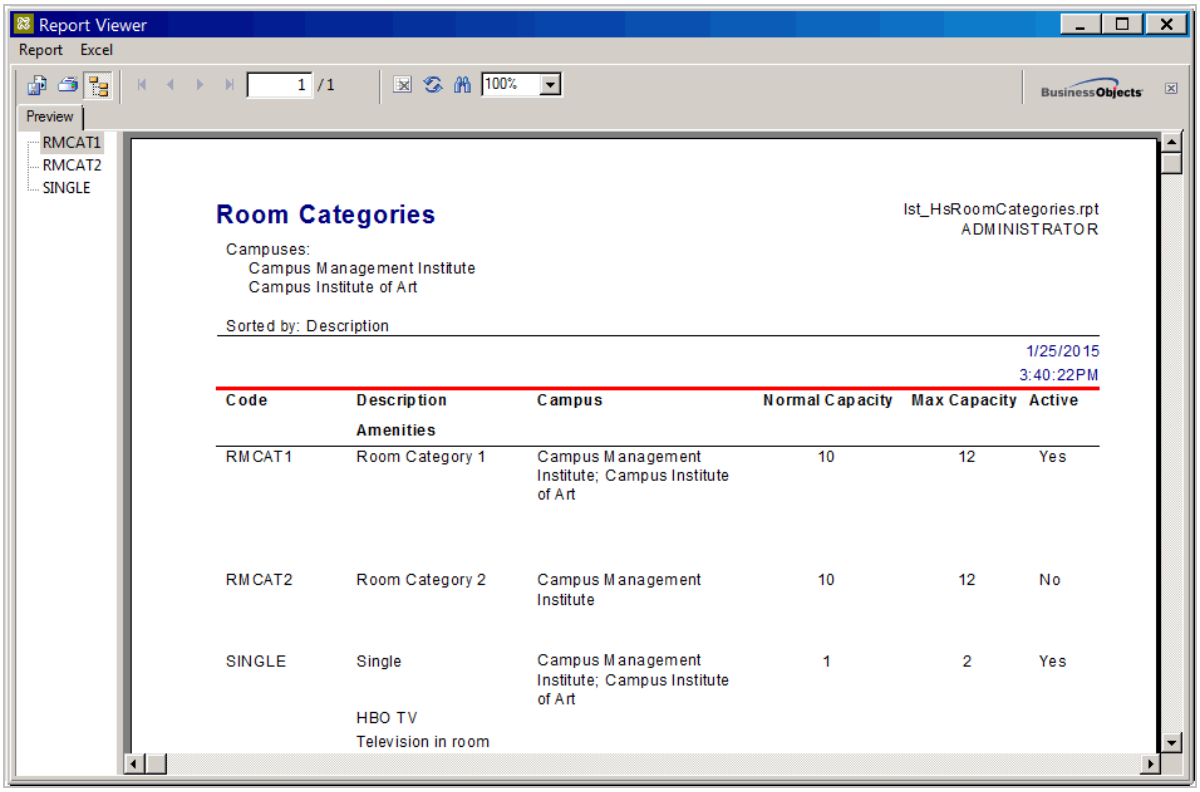
To print a list of room categories:

1. Click **Print** on the Setup - Housing Lists [Room Categories] tab. The Report Selection form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Select or clear **Yes** or **No** next to the Active label. If you select Yes, active records are listed on the report. If you select No, inactive records are listed. If you select both, active and inactive records are listed.

   If no records match the selection criteria, the message *"No records selected for the report"* is displayed.

   Sort the Room Categories report by Code or Description.
4. Click **Preview**. The report is assembled and displayed in the Report Viewer. The report contains the Code, Description, and Active indicator.



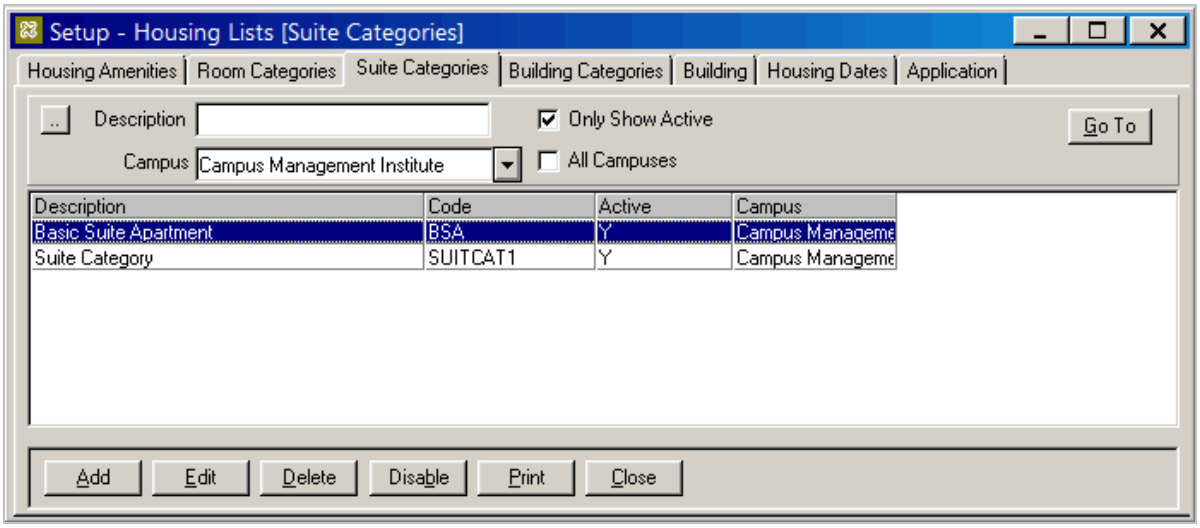
5. See Report Viewer for instructions on printing or exporting the report.

Setup - Housing Lists [Suite Categories]

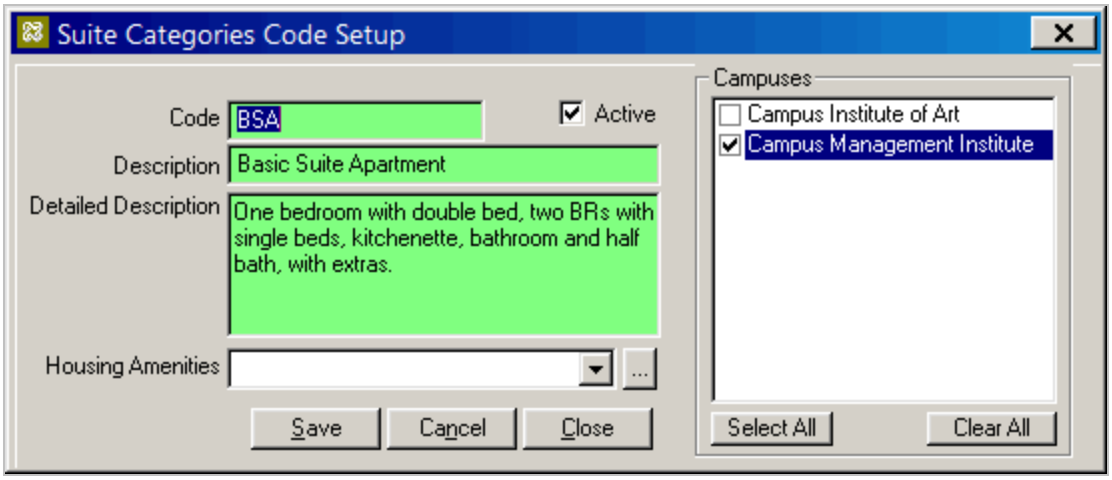
A suite is a collection of rooms. Use the Suite Categories tab of the Setup - Housing Lists form to classify the suites available for student accommodation into various categories.

To add or edit a list of suite categories codes:

1. Navigate to **Lists** > **Housing**. The Setup - Housing Lists form is displayed.
2. Select the **Suite Categories** tab.



3. Click to switch between Code and Description when searching for a record. Specify a **Code** or **Description** in the text box and press **Enter** to view the corresponding record in the list.
4. Select a **Campus** to view records only for a selected campus, or select **All Campuses** to view records for all campuses of your institution.
5. Select **Only Show Active** to view only active records. Clear this check box to view all records.
6. Click **Add**, or select a record and click **Edit**. The Suite Categories Code Setup form is displayed.



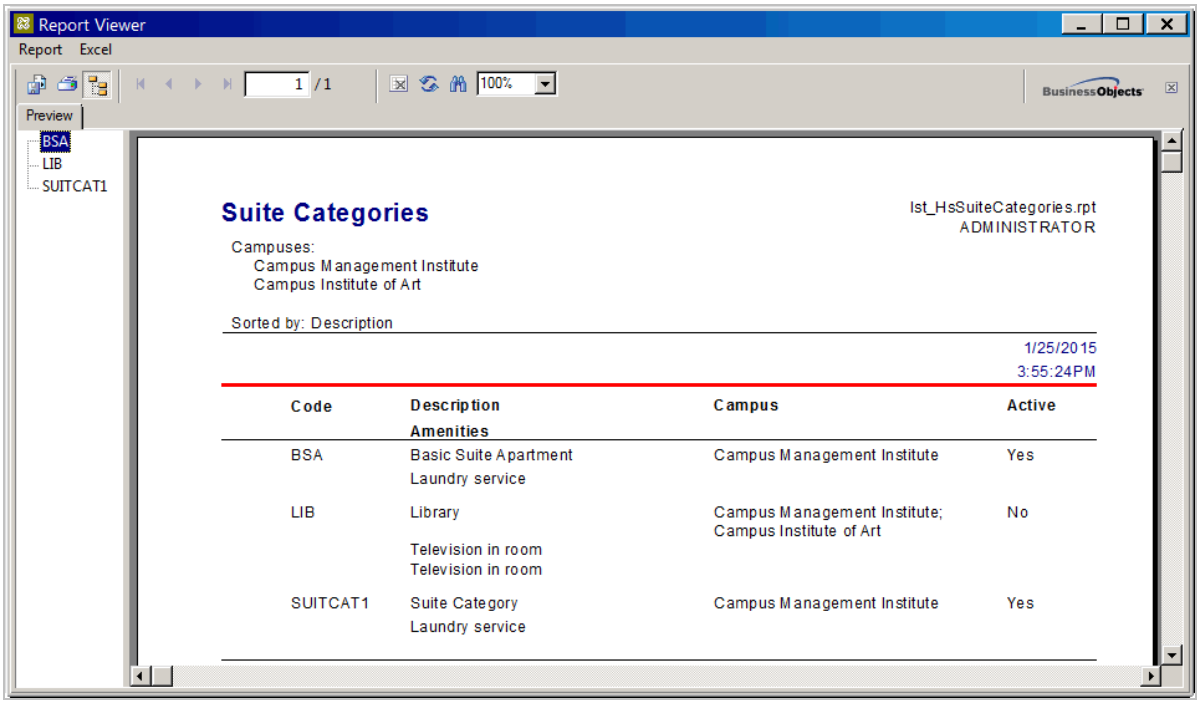
7. Specify a unique **Code**.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Enter a **Description**.
10. Specify a **Detailed Description**.
11. Select the **Campuses)** associated with the Suite Category.
12. Select the **Housing Amenities** available in the suite category. Click ... to select multiple housing amenities.
13. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

To print a list of suite categories:

1. Click **Print** on the Setup - Housing Lists [Suite Categories] tab. The Report Selection form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Select or clear **Yes** or **No** next to the Active label. If you select Yes, active records are listed on the report. If you select No, inactive records are listed. If you select both, active and inactive records are listed.

   If no records match the selection criteria, the message *"No records selected for the report"* is displayed.
4. Click **Preview**. The report is assembled and displayed in the Report Viewer. The report contains the Code, Description, and Active indicator.



5. See Report Viewer for instructions on printing or exporting the report.

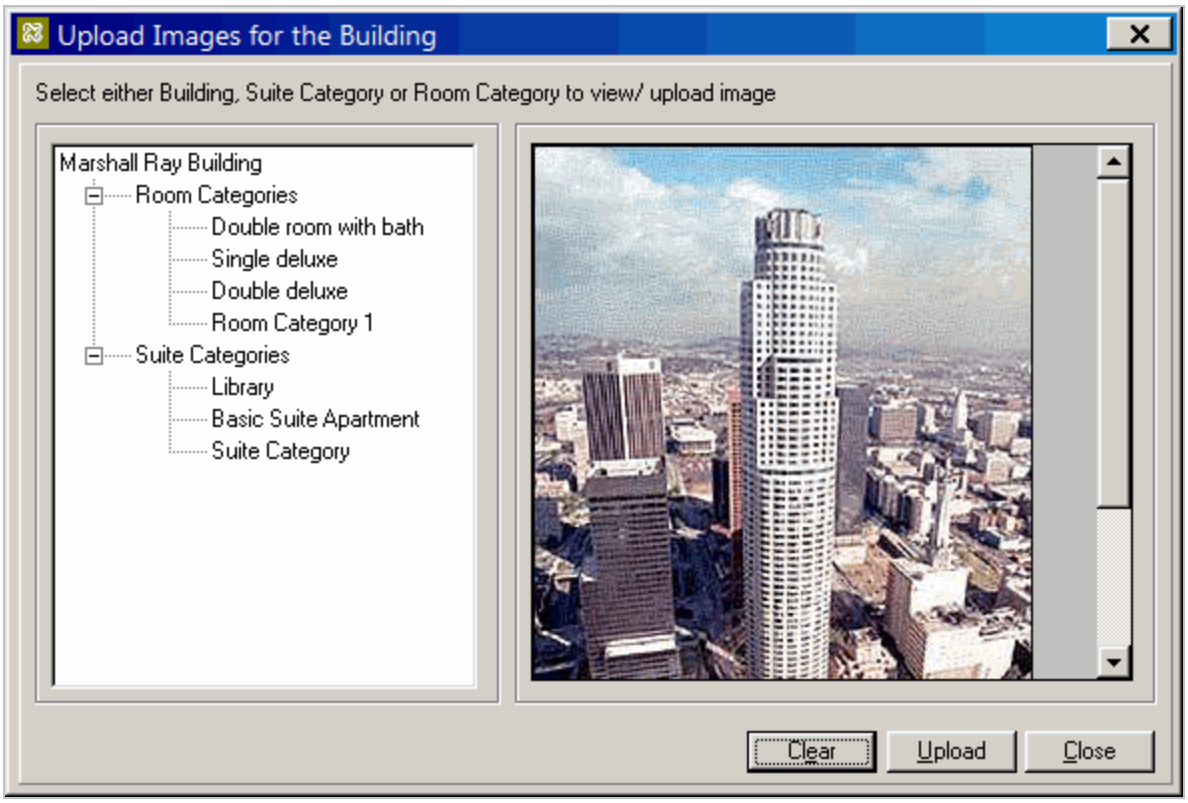
Uploading Building Images

You can import images of buildings, suite categories, and room categories into CampusNexus Student and display them when needed. The pictures are stored in a CampusNexus Student database.

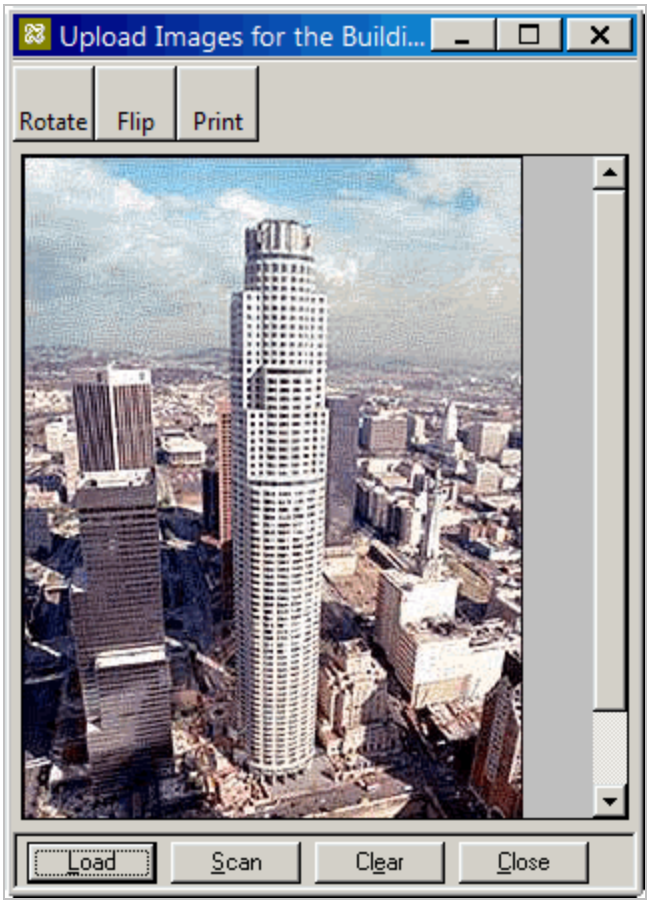
To upload images of the building, suite, and room categories:

1. Navigate to **Lists** > **Housing**. The Setup - Housing Lists form is displayed.
2. Select the **Building** tab.
3. Select a record and click **Edit**. The Building Code Setup form is displayed.
4. Click **Upload Image**. The Upload Images for the Building form is displayed.

   Note: The Upload Image button is enabled only after the details of the building are saved.



5. From the tree view, select the building name, room category, or suite category for which you want to upload an image, and click **Upload**.
6. Another Upload Images for the Building form is displayed. If a picture has already been imported, it is displayed on this form.



7. Click **Load** to import a picture from a file on disk. CampusNexus Student displays a directory search form. Use it to find the image you want to import.
8. Click **Scan** to open your scanner software and import an image directly from a scanner attached to your computer or on your network.

   When you click Scan, CampusNexus Student checks for "Twain" compliant applications. If there is more than one, choose one. When the image is scanned, select an option in the scanner application to export the scan to CampusNexus Student.

   Edit, crop, and size the picture before you load the image file into CampusNexus Student. Once it is imported, you cannot change anything except its orientation.
9. Click **Rotate** to rotate the image on the form 90 degrees.
10. Click **Flip** to "turn the picture upside-down". This is the same as rotating it 180 degrees.
11. Click **Print** to print the picture. The picture is enlarged to just fit on an 8.5" x 11" sheet of paper.
12. Click **Clear** to clear an existing picture from the form and from the database.
13. Click **Close** to close the form. Changes you have made are saved. The picture box in the previous Upload Images for the Building form shows the selected image.
14. Click **Close** to close the form.

Daily Menu

This menu leads to functions that are performed frequently during everyday operation of your institution. There is a submenu related to each department with options pointing to its own daily procedures. The Daily menu options include:

- Contact Manager
- Admissions
- Financial Aid
- Student Accounts
- Academic Records
- Distance Education
- Career Services
- Loan Management
- Student Services
- Housing

Daily > Contact Manager

The Daily > Contact submenu options include:

- Contact Manager
- Schedule Activities
- Schedule Documents
- Letters
- Process Transcript Requests
- Search Reference Address
- Transcript Request Letters
- SEVIS Transmission
- PDSO SEVIS Review
- Default Campus Assignment
- Advisor Assignment
- National Do Not Call Phone Lookup
- Agency/Third Party
- Incident
- Document Assignment
- Modify Batch Activities
- General Public
- Batch Update School Fields
- <Detach> (This options detaches the submenu.)

Contact Manager Form

Contact Manager is a tool for managing your appointments, events, and activities related to leads, prospects, students, and employers. In fact, just about any contact related to your work can be recorded and tracked by the Contact Manager. You can see your "Daily Schedule" at a glance. Activities could include entrance interviews, incoming and outgoing telephone calls, meetings, and other events that affect your work day.

Staff members with the appropriate permissions can add activities and messages to the Contact Manager files for other staff members. For instance, a person in the Admissions Department may be assigned to record new leads and assign them to Admissions Reps for follow-up.

Some "automatic activities" such as "call student", "set up an entrance test", "arrange entrance interview", may be assigned to you based on events that are monitored by the system. These "automatic" items that you might suddenly find on your list of things to do result from decisions that have been made by your institution's management. They may decide that when a student is placed on probation, the student's counselor gets an activity added to his or her calendar to call the student to set up an appointment for an in-person interview. This could result in a message for the rep to call "John Smith" at his home telephone to arrange for the appointment. The rep, in turn, would then indicate that the call had been placed, and that an appointment was set for next Monday.

Since much of the information displayed in the Contact Manager is related to students, provision is made in CampusNexus Student for you to see all the contact activity related to a given student. This is available from the Activities option on the View/Contact Manager menu, the "Student Bar" located to the left of the work area, and by clicking the Contact History button on the Toolbar. You must be logged in to CampusNexus Student as the person to whom an activity is assigned to edit or close it.

When students are imported into CampusNexus Student as a "New Lead" lead source from the Internet in **Daily > Admissions > Process Electronic Leads**, an activity is created in the **Daily > Contact Manager > Contact Manager > Activities** tab for any student that has been created or changed to "New Lead".

Lead Source and **State** are displayed on the grid when activities relate to students.

When you select a sort order by clicking a column header on the Activities grid, the list is first sorted by the column you click, and then by the student's name field. For instance, if you click the Due Date column, the list is sorted by student name within each due date. As you work with the Contact Manger form, click **Refresh** at any time to update the display with any changes you may have made.

You can sort the Contact Manager list of activities by **Activity Category** or **Status** in ascending or descending order for all activities.

Please read the Contact Manager Security Policy.

To manage activities in the Contact Manager:

1. Navigate to **Daily > Contact Manager > Contact Manager**. The Contact Manager form is displayed.

   Note: The current session default Campus and Staff Member are displayed.

2. Select the **Campus**. The list shows only those campuses which the logged in user is authorized to access. When the campus is selected, the Staff Member list shows only those staff members associated with the selected campus.

3. Select the **Staff Member**.

   Note: If <Unassigned Activities> is selected, activities are listed that are not assigned to a staff member and that adhere to the Contact Manager policy associated with the logged in user.

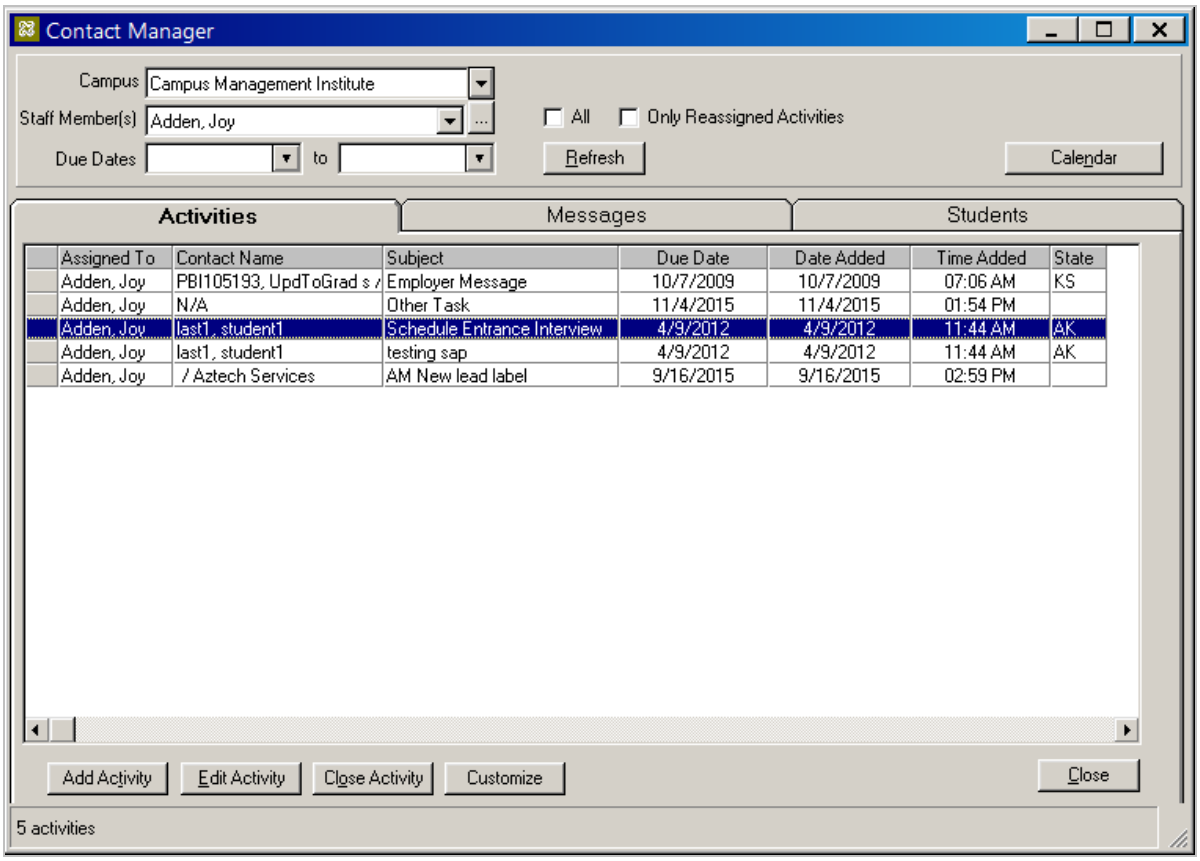
   An unassigned activity is listed only when the user has Read and Assign permissions for the activity type associated with the activity specified within the Contact Manager policy associated with the logged in user. Users with

these permissions can access the unassigned activities and reassign them to active staff members by selecting an activity and clicking **Edit Activity**. On the form that opens, the **Assign To** field will be blank and the user can assign this activity to a staff member and save it.

4. Confirm that the correct **Due Dates** are displayed, otherwise select due dates. If you changed the due dates, click **Refresh**. CampusNexus Student adjusts the list of activities to reflect the modified due dates.

5. The **Activities** tab displays a list of activities based on Staff Member and Due Dates. You can add, edit, or close an activity from this form by clicking one of the buttons at the bottom of the form.

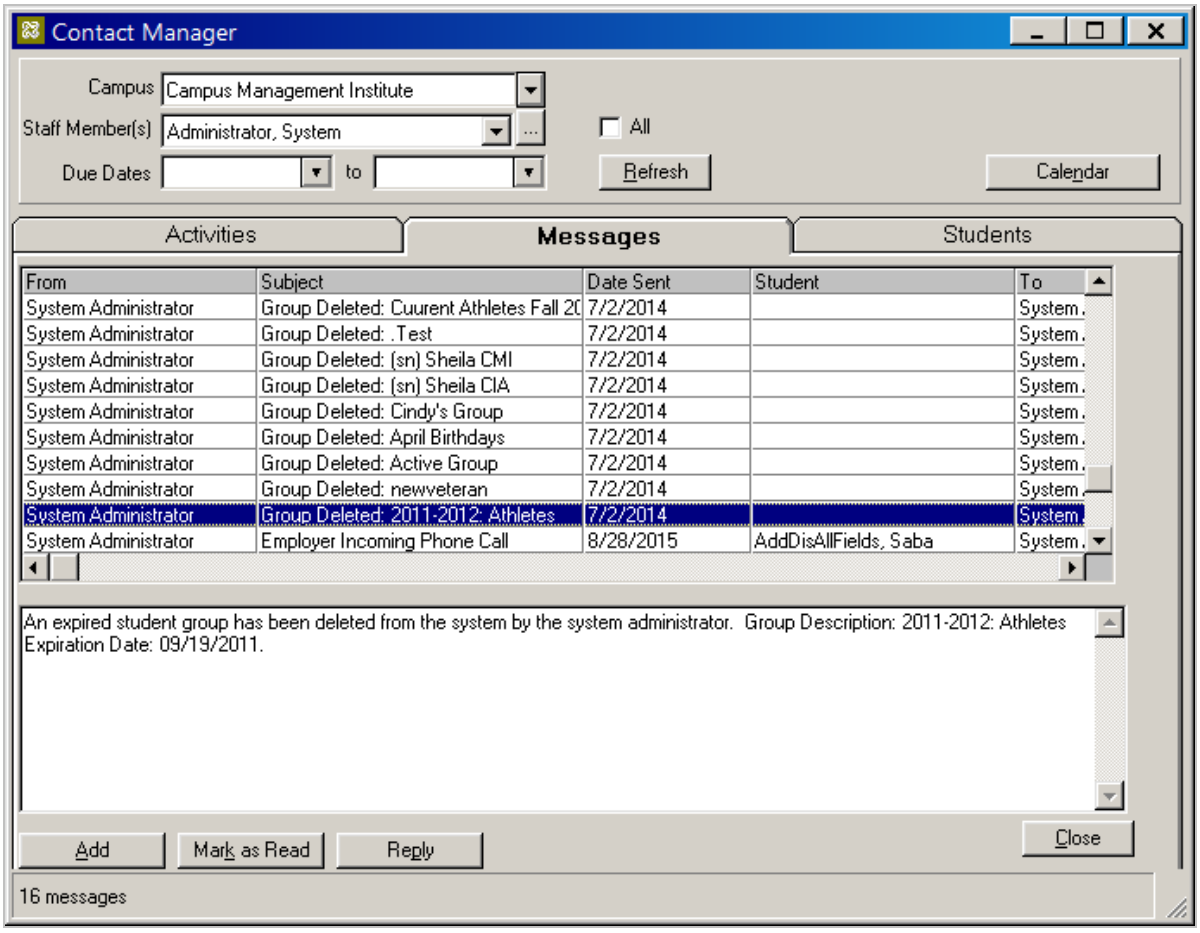
   The **Calendar** button displays all your activities with time of day. For an activity to appear on the daily schedule form, it must have a beginning and ending time.



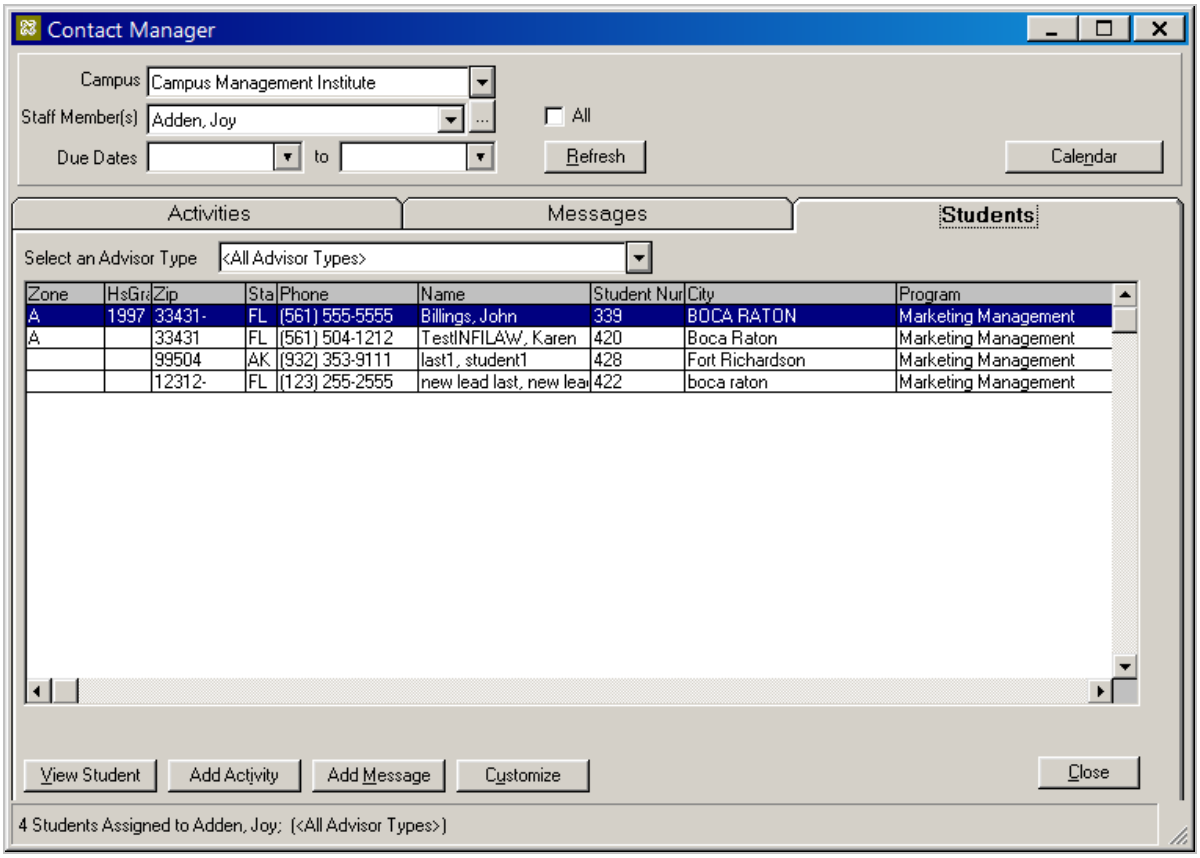
6. Click **Customize** to customize columns displayed on the Activities tab.

   Note: The "Time Zone" field can be selected only to hide/show on the Activities tab. The position of the column cannot be rearranged (i.e., the column remains between the "Time" and "Student Phone #" columns).

7. The **Messages** tab displays a list of messages and provides add, delete, or reply options. For more information, see Messages Tab.



8. The **Students** tab displays a list of students that are assigned to the Staff Member. For more information, see Students Tab.



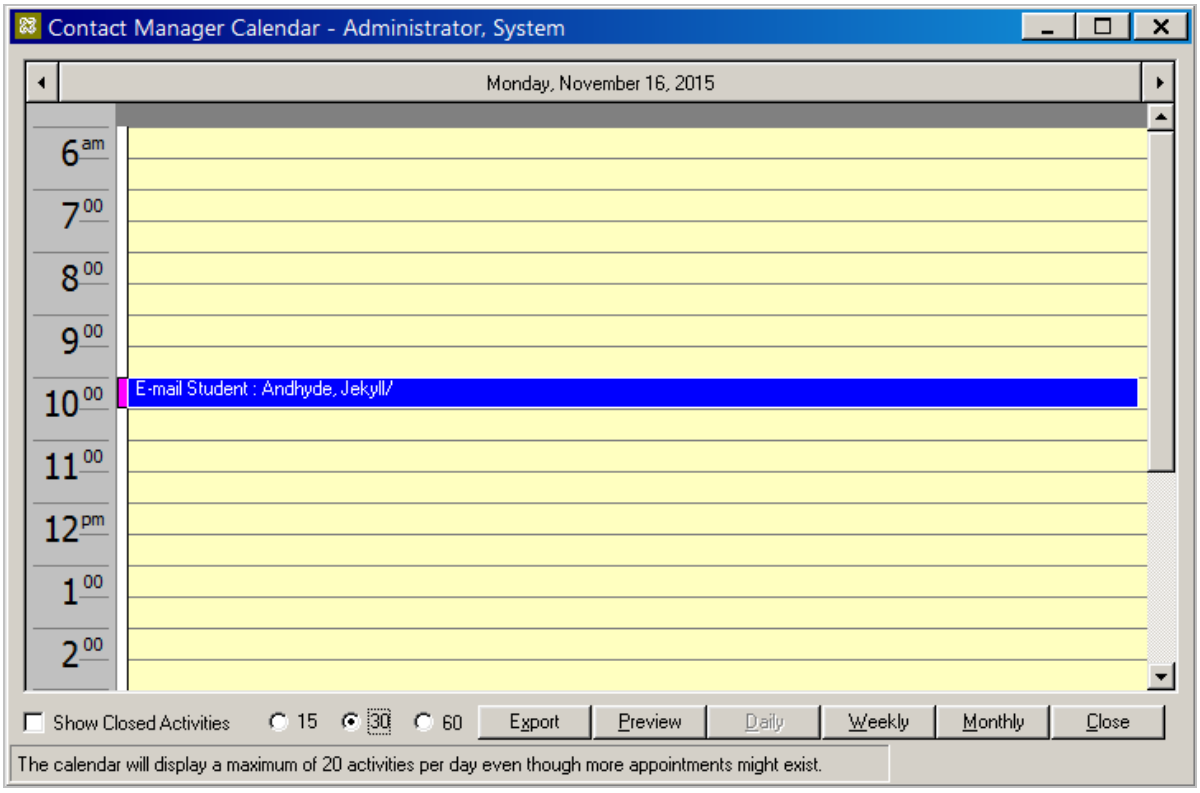
9. Click Calendar to access the Calendar form. For more information, see Activity Calendar.
10. Click **Close** to close the form.

Activity Calendar

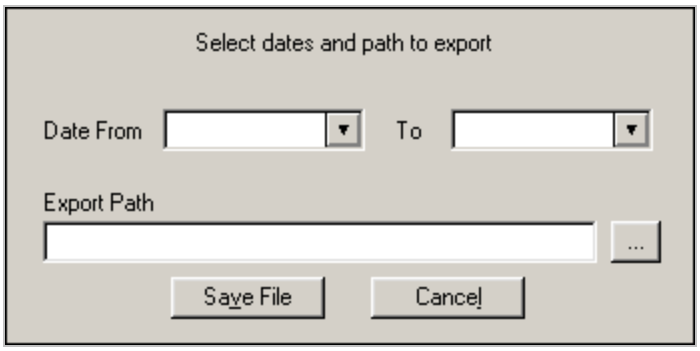
Activities that have been assigned to a user can be viewed in a daily (default), weekly, or monthly calendar. New activities can be added while viewing the calendar. The daily calendar can be printed. Activities can also be exported to iCalendar files, vCalendar files, or imported in to Microsoft Outlook® Calendar.

To use the activity calendar:

1. Navigate to **Daily** > **Contact Manager** > **Contact Manager**. The Contact Manager form is displayed.
2. Click **Calendar**. The Calendar form is displayed. Activities that have been assigned are shown in blue next to the time for which they are scheduled.



3. By default, the daily view of the calendar is displayed. Click **Weekly** or **Monthly** to change the view.
4. Click and to view a different day, week, or month.
5. Select **15**, **30**, or **60** at the bottom of the form to view the calendar with the time divided into 15 minute, 30 minute, or 60 minute increments,
6. Double-click a time slot in the calendar to **add an activity**. The Activity form is displayed. Enter the required information and click **Save**. The activity is saved and added to the calendar.
7. In the Daily calender view, click **Preview** and then click **Print** to print the calendar.
8. Click **Export** to export the calendar information for use with other programs. The Select dates and path to export form is displayed.



9. Specify the **Date From** and **To** dates to designate the date range to export.
10. In the **Export Path** field, select the location of the export file.
11. Click **Save File**. A confirmation message is displayed. Click **OK**.
12. Click **Close** to close the form.

Activity Form

The Activity form is used to add or edit activities related to a student. To close an activity, see Closing an Activity.

When an activity record is being edited by a staff member, it is locked and cannot be viewed by other staff members. If you attempt to edit an activity that is being edited by another user, the following message is displayed: *[Staff Member Name] is currently working on this activity. Please try later.*

If you are editing an activity for a long period of time, you may see the message *This activity is set to unlock automatically within [NNN] minutes. Click Continue if you wish to continue.* If you do not acknowledge the message, CampusNexus Student will eventually end your editing session, and you may lose any changes you have made to the activity.

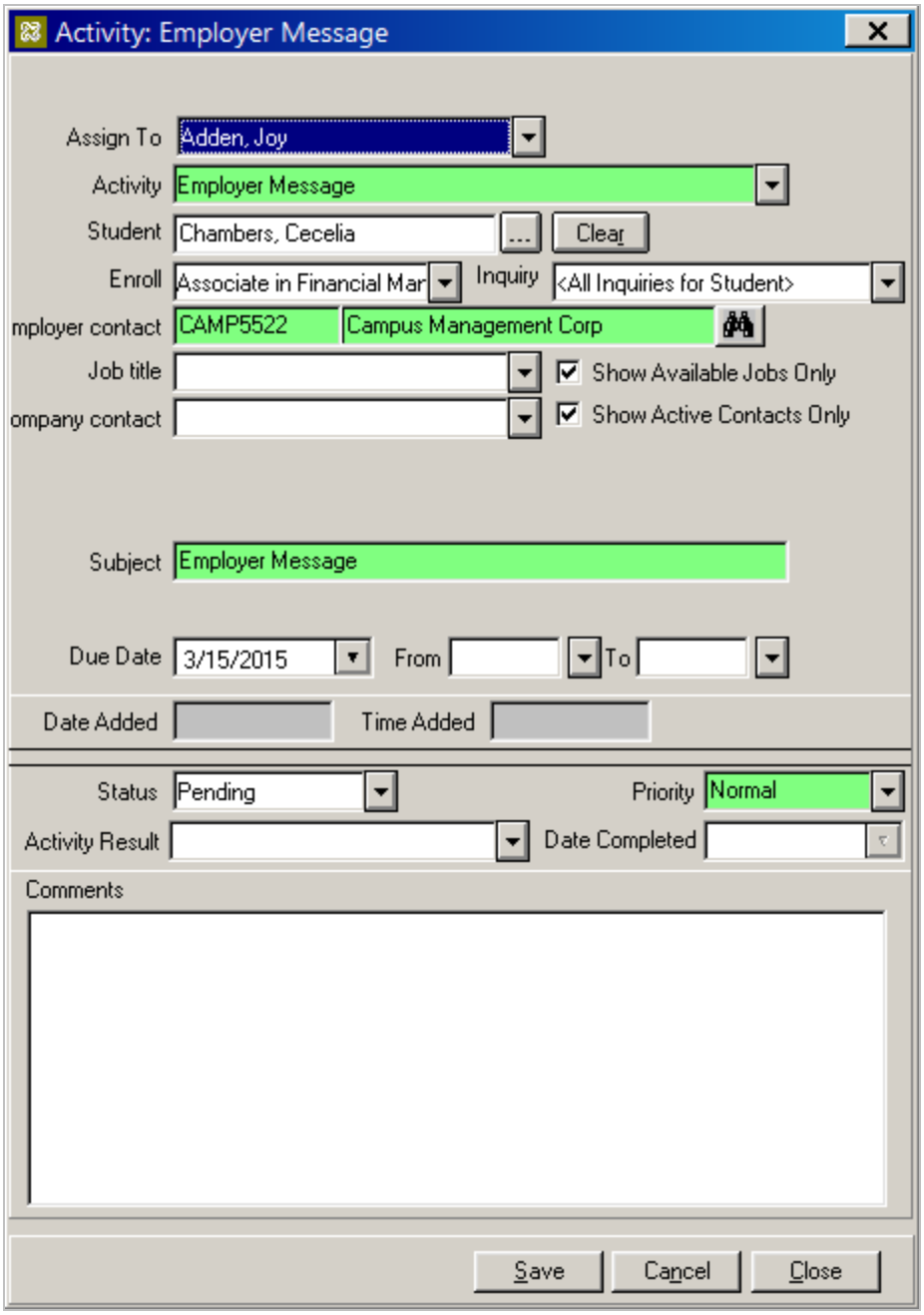
If you select an activity such as a letter with attachments that is a duplicate of an activity already on file with a status of pending, CampusNexus Student does not allow the duplicate activity to be added. (Some institutions refer to this as a duplicate fulfillment request.)

Please read the Contact Manager Security Policy before continuing.

To add or edit an activity:

1. Navigate to the Activity form using one of the following options:

   - **Student Master** > **Add Activity** (icon at the bottom right of the Student Master form). The Activity form is displayed.
   - **View** > **Contact Manager** > **Activities**. The Contact History form is displayed. Click **Add Activity** or **Edit Activity** to add or edit an activity for an individual student. The Activity form is displayed.
   - **Daily** > **Contact Manager** > **Contact Manager**. The Contact Manager form is displayed. Click **Add Activity** or **Edit Activity** to add or edit an activity on the Contact Manager List. The Activity form is displayed.



2. From the **Assign To** list, select the staff member to whom the activity is assigned. By default CampusNexus Student selects the person who is logged in. If you are authorized to assign activities to others, their names are listed.

   Permissions for activity assignments are set up by the system administrator under Setup > Staff > Activity Group Access.

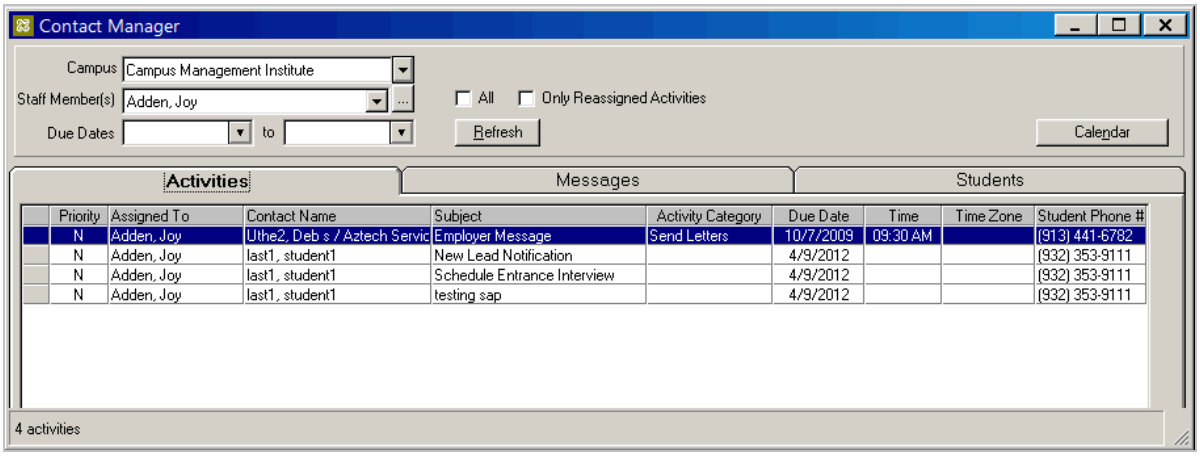
   ### Reassigning Activities

   When activities are reassigned from one staff member to another staff member, the message *Activities have been reassigned to you. Would you like to view them now?* is displayed when the staff member logs in to CampusNexus Student. This message is displayed only once. Likewise, when activities are reassigned to multiple staff members,

the message is displayed once to all members with the reassigned activities when they log on to CampusNexus Student. This is also true for multiple activities being reassigned to the same staff member, only one notification message is sent.

If activities are reassigned while the staff member is logged in, the staff member will see the activities without logging off. The notification message is not displayed the next time the staff member logs on to CampusNexus Student.

When the notification message is presented, the staff member can view the newly assigned activities. If the member decides not to view the reassigned activities and clicks **No**on the message, the Contact Manager form displays a list of all activities.



Note: By default, the **Only Reassigned Activities** check box on the Contact Manager form is cleared. When selected, the check box is displayed only when the staff member selects the Activities tab. Scroll to the right on the Activities tab to view the 'Reassigned Date'.

3. On the Activity form, select an appropriate **Activity**.
4. When the activity is selected, CampusNexus Studententers the Activity description in the **Subject** field. Change the text in the Subject field if necessary.
5. Select the **Student** to whom the activity is related. If necessary, click ... to the right of the student field and use the **Search** tool to find the student.

   Click **Clear** to change the student for this activity or to remove a previously selected student.
6. If the student enrolled in a program, select the student's enrollment from the **Enroll** list. The student's enrollments (Lists > Academic Records > Program Versions button) appear in the Enroll list. The Enroll field is not displayed for a student who has not yet enrolled.
7. If the Activity involves a student's previous inquiry about a program, select an item from the **Inquiry** list.
8. If the Activity was defined as requiring that an employer be contacted, enter an **Employer**. Search for the employer using the icon.
9. If the activity was defined as an employer-related activity, optional or required, select a **Job** and **Contact**. Select **Show Available Jobs only** to show only available jobs in the list. Likewise, select **Show Active Contacts only** to display only active contacts.
10. A **High School** field is displayed under certain conditions (see Note). When the field is visible, enter or edit the

High School.

Note: Activities involving an organization (High School) only display the High School information when accessed by navigating to:

- View > Admissions > Education > Activities (High School)
  - OR -
- Daily > Admissions > High School > Search > Edit > Activities > Add Activity.

The High School and Organization ContactID are not displayed when the activity is accessed any other way.

11. If the High School field is displayed, an **OrganizationContactID** field is also displayed (see Note). The list displays the contacts for the selected high school.
12. *(Optional)* Specify the **Due Date**, **From**, and **To** time. The 'From' and 'To' fields contain 15-minute increments between 7:00 AM and 10:45 PM. If an activity is assigned with the same date and time as a previously saved activity, a warning message is displayed when you click Save.
13. **Date Added** and **Time Added** are read-only fields.
14. *(Optional)* Select the activity **Status**.The options are:
    - Pending (default)
    - Cancelled
    - Closed
    - Follow Up
15. Select the activity **Priority**. The options are:
    - Normal (default)
    - Low
    - High
16. If the activity status you selected in the Activity Status list is considered a closed activity, select an activity result from the **Activity Result** list.
17. Enter any **Comments** about the activity.
18. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. The new activity appears on your main Contact Manager Activities list.

    Note: If an activity is scheduled at the same time as a previously entered activity, a message is displayed warning of the conflict and asking if you want to proceed.

    - When you select **Yes**, the activity is saved and both activities are scheduled at the same time.
    - When you select **No**, the Activity form is re-displayed with the information originally entered. Enter a new time to avoid a scheduling conflict.

Closing an Activity

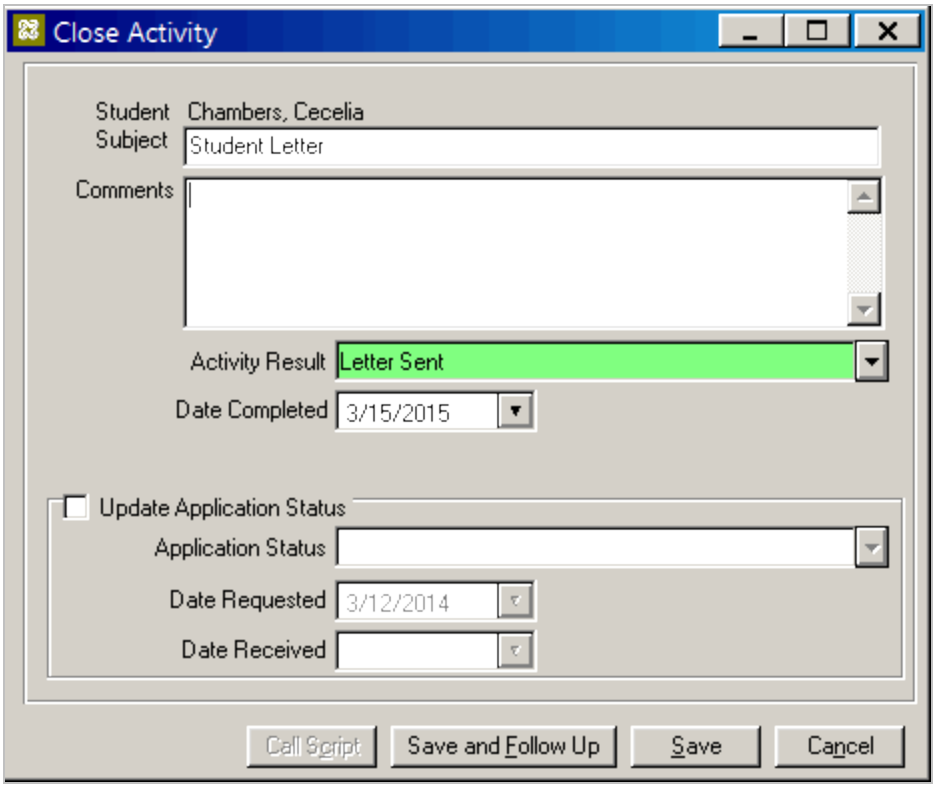
You can close a Contact Manager activity and, if necessary, assign a follow up activity using the Close Activity form.

Activities can be edited or closed only by the person to whom they are assigned. You must be logged in to CampusNexus Student as the person to whom an activity is assigned to edit or close it.

Please read the Contact Manager Security Policy before continuing.

To close an activity:

1. Navigate to **Daily > Contact Manager > Contact Manager**. The Contact Manager form is displayed.
   - OR -
   Navigate to **View > Contact Manager > Activities**. The Contact History form is displayed.
2. Select the activity to be closed.
3. Click **Close Activity**. The Close Activity form is displayed.



4. Select the **Activity Result** and edit the information related to the activity, such as comments, date completed, and so on.
5. If appropriate, click **Change Student Status** and select the correct status.

   Note: The Change Student Status check box on the Close Activity form is disabled if the student has been enrolled.
6. If appropriate, click **Update Application Status** and select the correct application status.
7. If necessary, enter the **Requested** and **Received Dates** for the application.
8. To add a follow up activity, click **Save and Follow Up** before you close the activity. Enter the information for the

follow up activity in the same manner that activities are added or edited.

9. **Save** your follow up activity before closing the current activity.
10. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Messages Tab

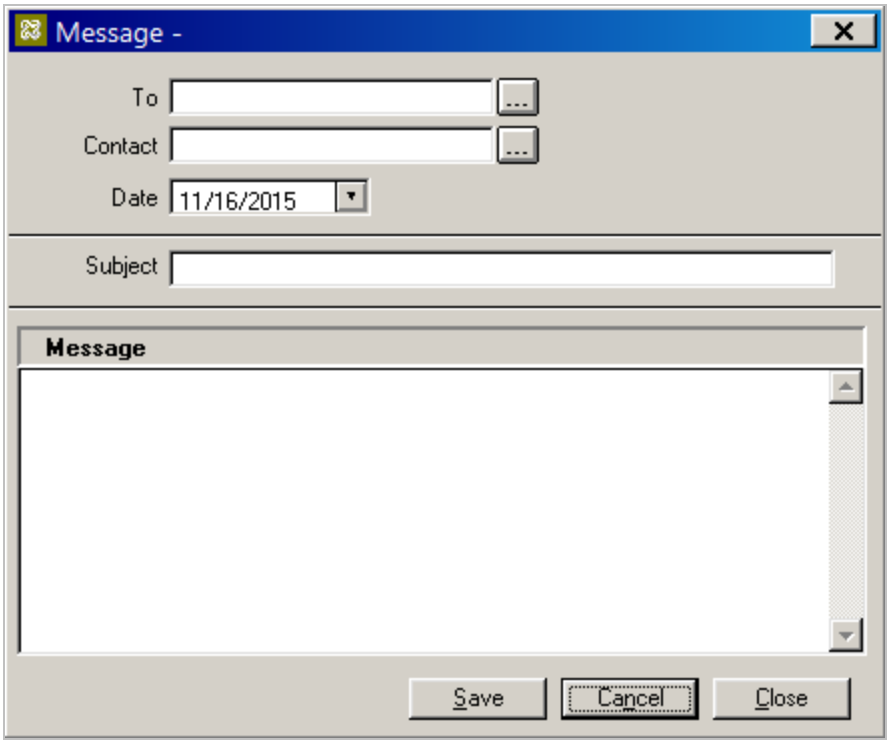
In Contact Manager, you can perform the following tasks related to messages:

- Add a message
- Reply to a message
- Mark a message as read (delete a message)

To add a message in Contact Manager:

You can send messages to yourself (as a reminder) or to other staff members.

1. Navigate to **Daily > Contact Manager > Contact Manager**. The Contact Manager form is displayed.
2. Click the **Messages tab**. The form displays a list of messages for the selected staff member. The top of the Contact Manager form indicates from whom the message is being sent. If the message is a reminder to yourself, your name is displayed in the staff member field
3. Click **Add**. The Message form is displayed.

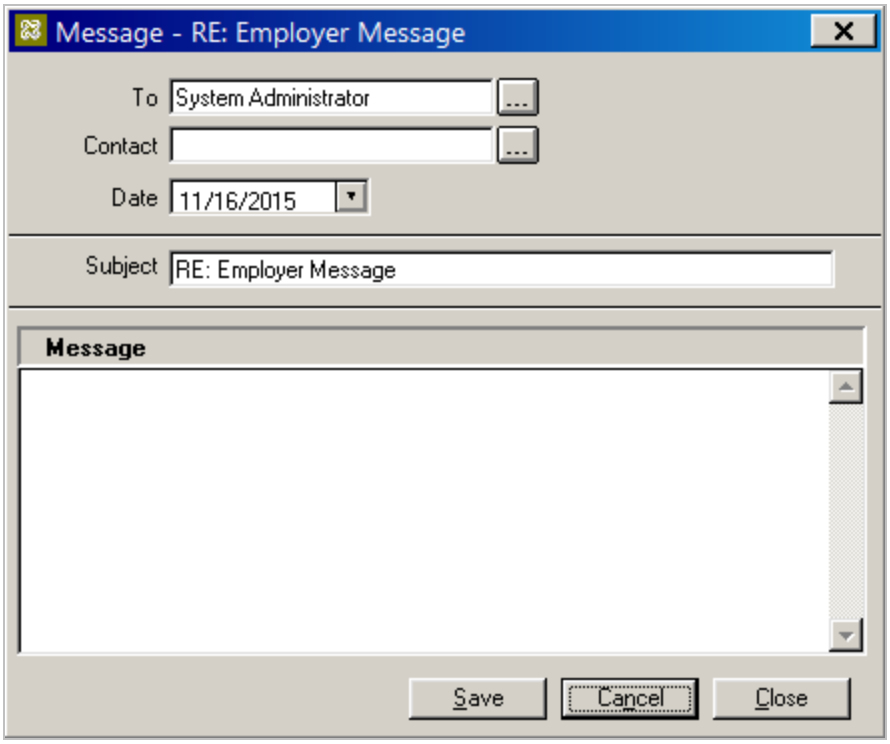


4. Click ... to the right of the **To** field to select the recipient of the message. You will see only staff members from the campuses to which you have access. If the message is a reminder to yourself, click your own name.
5. Click ... to the right of the **Contact** field to select the student to be contacted.
6. Enter the **Date** of the message.
7. Enter the **Subject** of the message.
8. Enter the **Text** of the message.

9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. CampusNexus Student adds the message to the recipient's message list.

To reply to a message in Contact Manager:

1. Navigate to **Daily > Contact Manager > Contact Manager**. The Contact Manager form is displayed.
2. Select the **Staff Member** for whom messages are to be listed. You can only reply to messages sent to you.
3. Click the **Messages tab**. A list of messages (if any) is displayed.
4. Select a message and click **Reply**. The Message form is displayed.



5. Click ... to the right of the **To** field to select the recipient of the reply. By default, the name of the message sender is indicated.
6. Click ... to the right of the **Contact** field to select the student to be contacted.
7. Enter the **Date** of the reply. By default, the current date is displayed.
8. Enter the **Subject** of the reply. By default, the subject line of the original subject is displayed.
9. Enter the **Text** of the reply in the Message field.

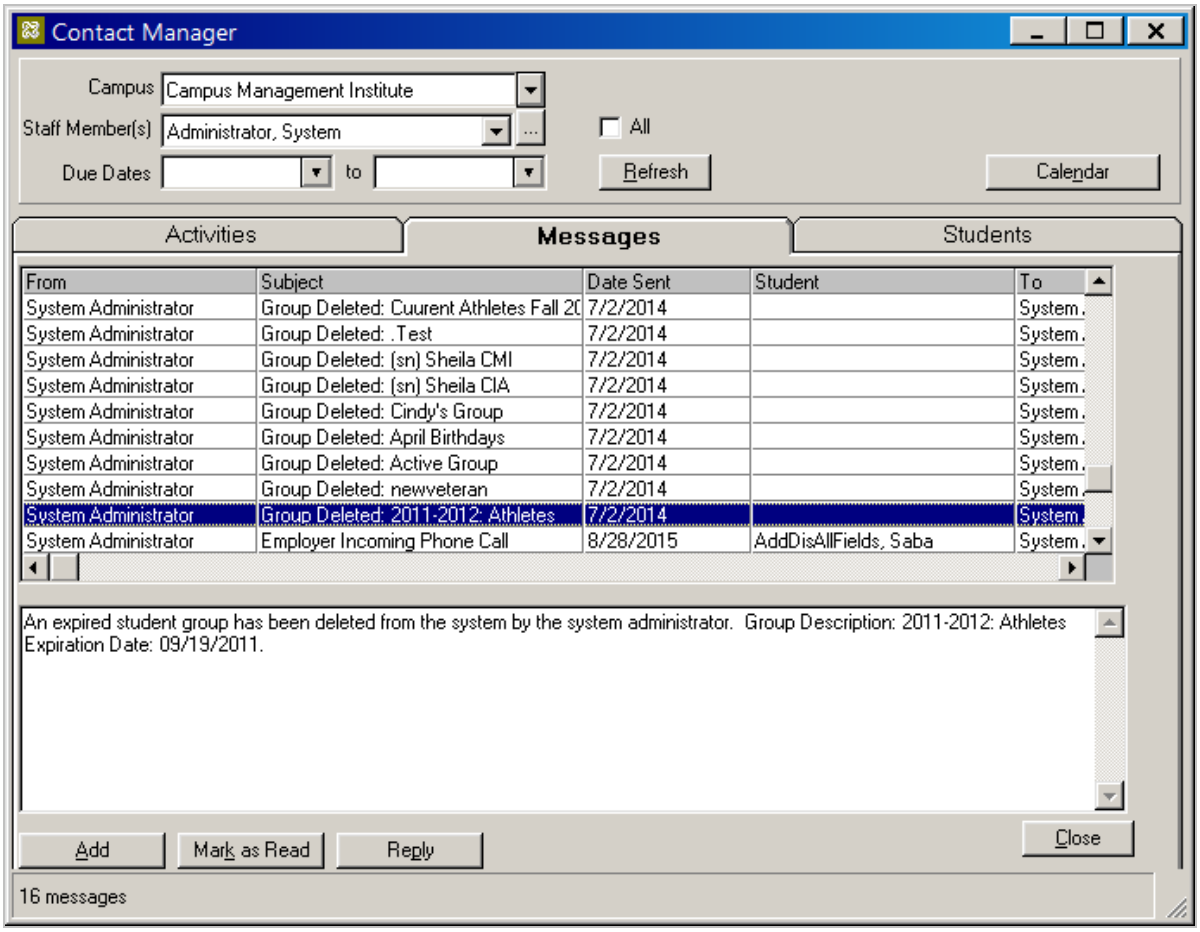
To mark a message as read in Contact Manager (Delete a Message):

When you have read your message, you can mark it as having been read. This results in the message being removed (deleted) from the list. It cannot be recalled after it has been marked as read. While you can view the messages of other staff members, you can only mark your own messages as read.

1. Navigate **Daily > Contact Manager > Contact Manager**. The Contact Manager form is displayed.
2. Select the **Staff Member** whose messages you want to see. If the message is a reminder to yourself, your name

appears in the Staff Member field.

3. Click the **Messages tab**. A list of messages for the selected Staff Member is displayed.



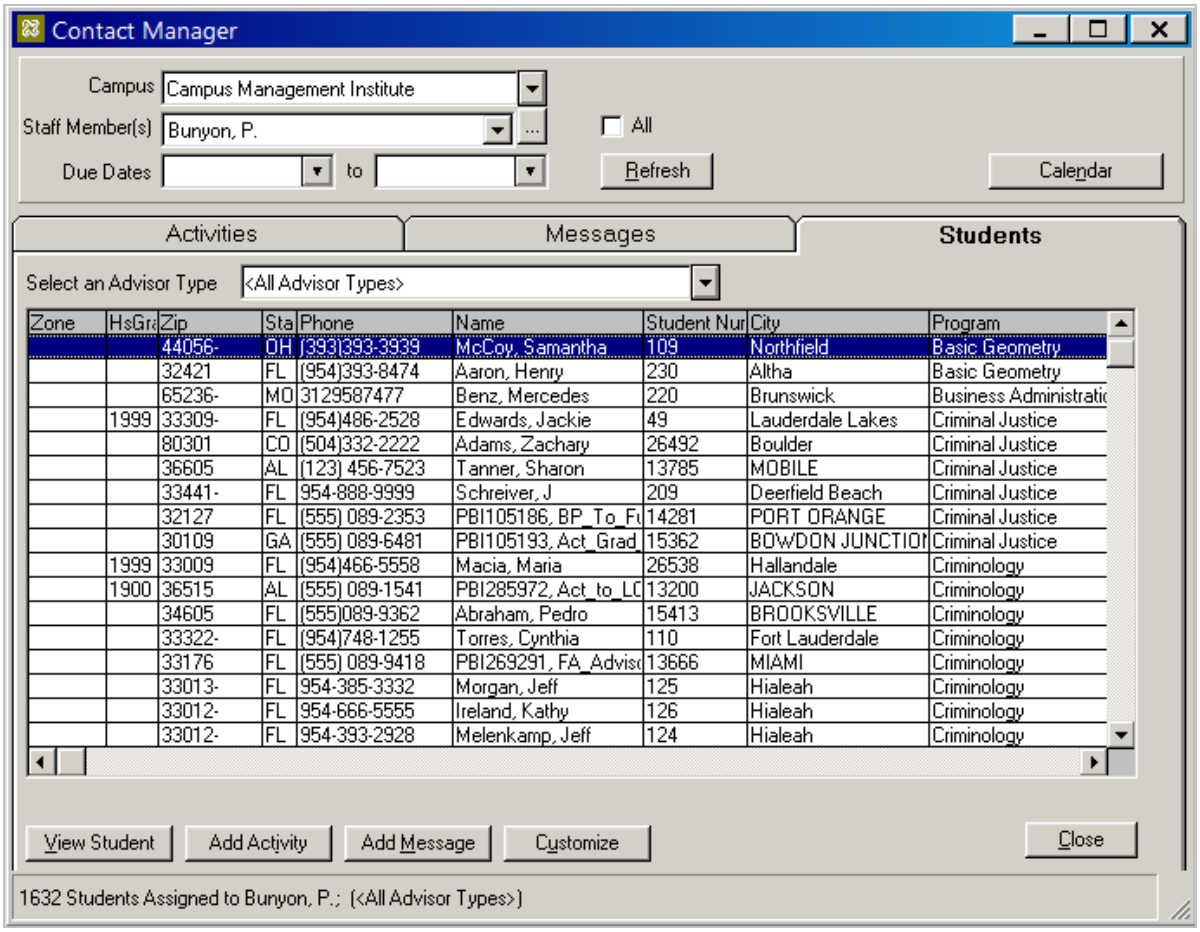
4. To filter the message list, specify a date range in the **Due Dates** fields.
5. If you change the filter criteria, click **Refresh**.
6. On the list of messages, click the message to be marked as read (deleted).
7. Click **Mark as Read**. The message is removed from the list of messages.

Students Tab

The Students tab on the Contact Manager form displays a list of students assigned to you. These are students for whom you are the Admissions Rep, Academic Advisor, and so forth. From this form, you can view a selected student's personal data form, add an activity related to a selected student, create a message related to a selected student, and customize the way the student list is displayed. You can also filter the list to see only students with specific characteristics.

You can adjust the width of a column on your student list by positioning your pointer on the vertical line that separates the column headers.

1. Navigate to **Daily > Contact Manager > Contact Manager**. The Contact Manager form is displayed.
2. Select the **Students** tab.
3. To filter the list of students, select an **Advisor Type**.



To view a student:

1. Select a student.
2. Click **View Student**. The Student Master form is displayed.
3. View or edit the student data as you require.

To add an activity

1. Select a student.
2. Click **Add Activity**. The Activity form is displayed
3. Enter the activity data. See Activity Form for more details.
4. Click **Save** to record the activity.

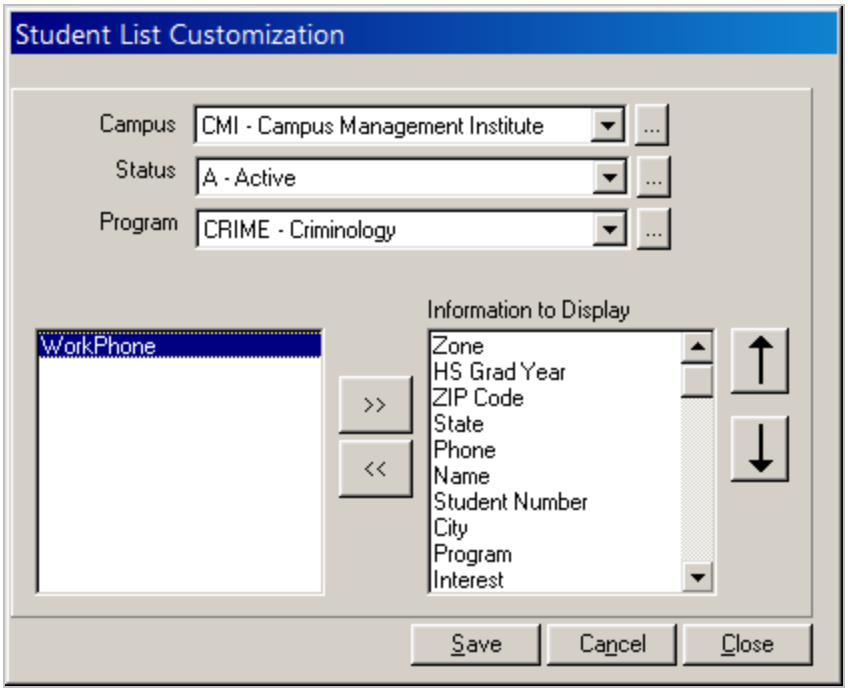
To add a message:

1. Select a student.
2. Click **Add Message**. The message form is displayed.
3. Enter the message data. See Add a Message in Contact Manager for more details.
4. Click **Save** to record the message.

To customize your student list:

1. Click **Customize**. The Student List Customization form is displayed.
2. Select the **Campus**, **Status**, and **Program**.

   When you select one or more **Status** values from the drop-down list, only the selected statuses appear in the Students tab's listings of the Contact Manager form.



3. To add an item of student data to your student list, select the item in the left-hand window and click to add the item to the **Information to Display** list.
4. To remove an item of student data from the **Information to Display** list, select the item in the right-hand window

and click .

5. To arrange the Information to Display items in a different order, select an item and click the up or down arrow button.
6. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.
7. Click **Refresh** on the main **Contact Manager** form to refresh the list of students. A message reminds you that filters have been set.

Activity Scheduler Overview

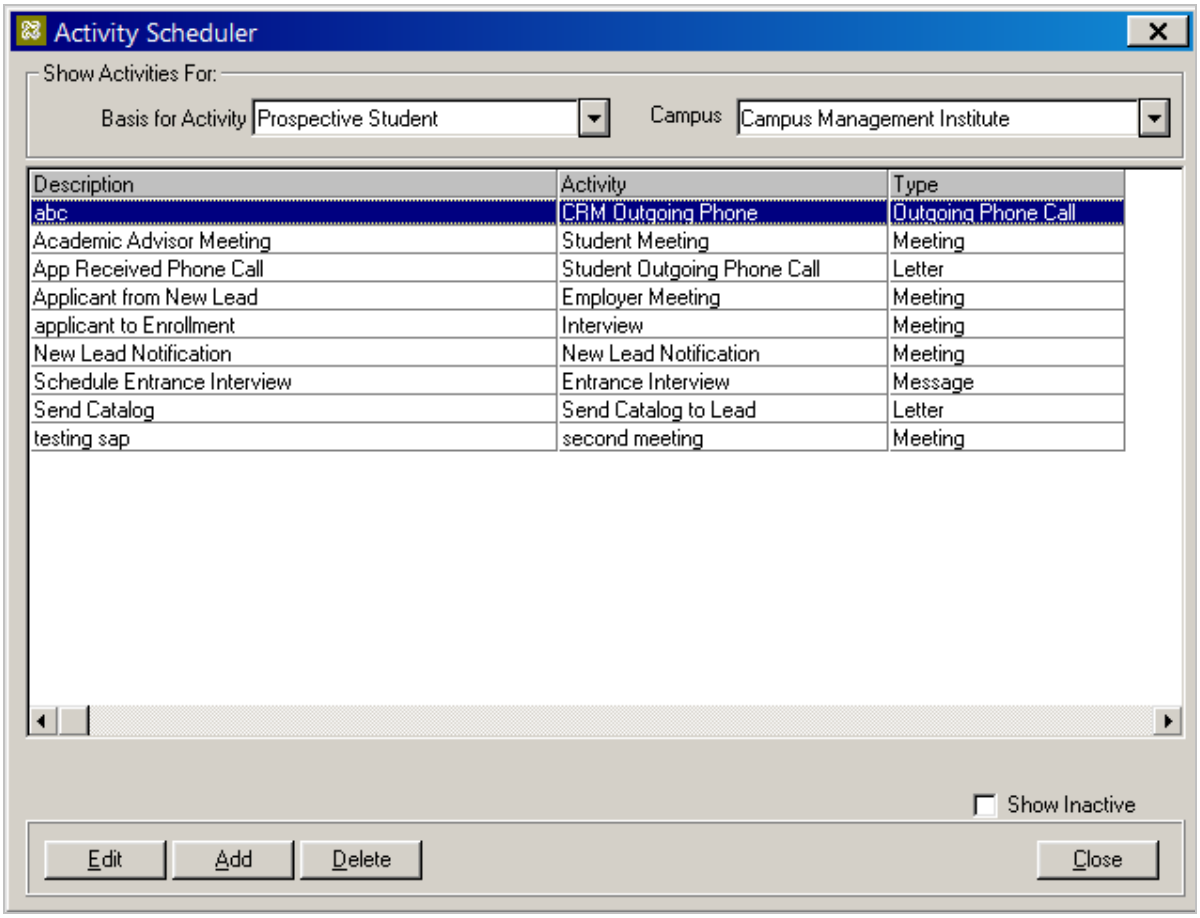
Administrators can automatically assign activities to staff members. Activities can include emails, follow up telephone calls, letters to enrolled and prospective students, and more.

For instance, administrators can automatically schedule a phone call or email to occur when a student's Leave of Absence is about to expire, eliminating the need to do a manual search in CampusNexus Student to find students with expired LOA dates.

Administrators can choose a description of these activities, specify what change in status should trigger the activity, which students or lead types should be targeted, and select a date for these activities to be assigned.

To add an automatically assigned activity:

1. Navigate to **Daily > Contact Manager > Schedule Activities**. The Activity Scheduler form is displayed.



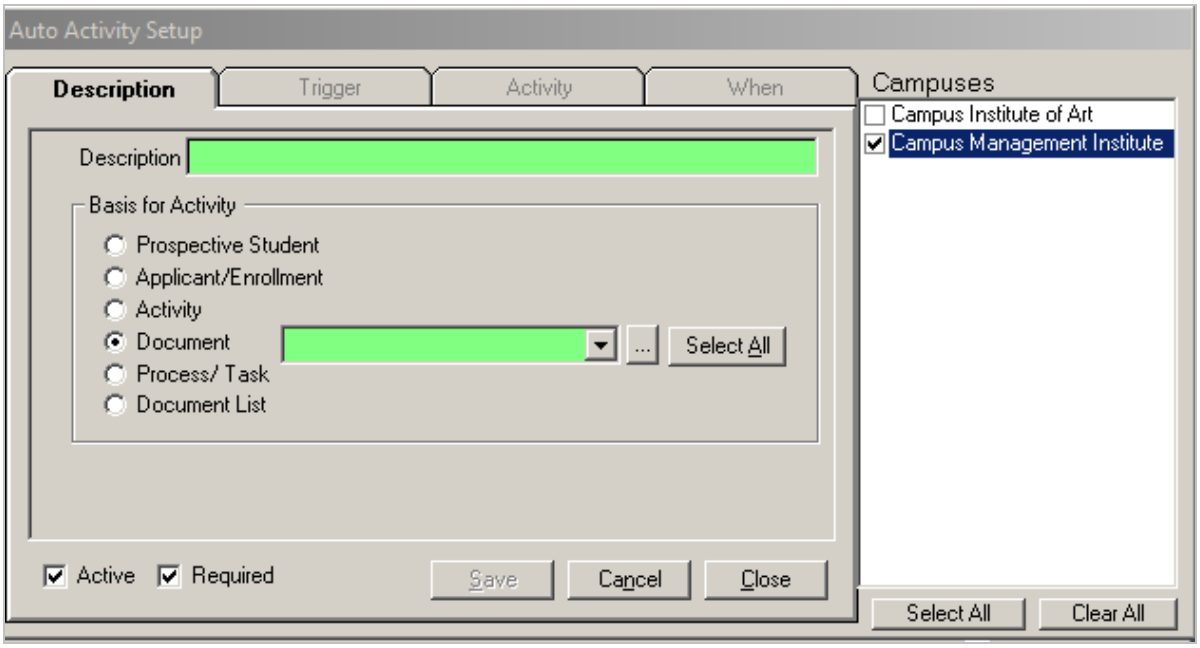
   You can add, edit, or delete an activity that will be automatically assigned to staff members based on events associated with Prospective Students, Applicant/Enrollment, Activity, Document, or Process/Task.

2. Select the **Campus** to which the activity applies and click **Add**, **Edit**, or **Delete** as appropriate.
3. Select the **Show Inactive** check box to display inactive activities.
4. Select one of the following **Basis for Activity** options:

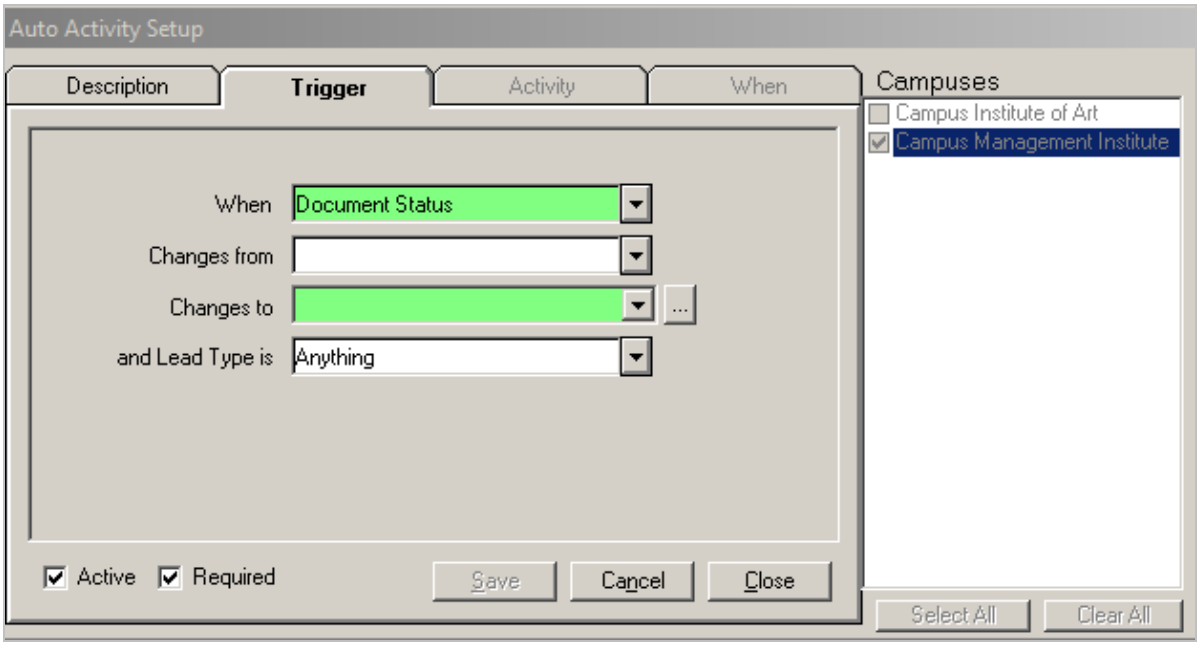
- **Prospective Student** - enable this option to display the automatic activities that are based on student status changes.
- **Applicant/Enrollment** - enable this option to display the automatic activities that are based on enrollment status changes.
- **Activity**- enable this option to display activities that are based on the status or results of other activities.
- **Document** - enable this option to display the automatic activities that are based on document changes.
- **Process/Task** - enable this option to display activities that occur as part of a process or a task.
- **Document List** - enable this option to schedule an activity based on the Document List (a group of documents). The activity will be triggered when all the documents have the same status and not for all the documents.

Activity Scheduling on the Basis of Document List

1. On the Activity Scheduler form, select **Document List** and click **Add**. The Auto Activity Setup form is displayed.



2. Select the **Document** option. A list is displayed next to the Document option. The list has the value of Document List based on the logged in user.
3. In the Document field, click and select a document.
   - OR -
   Click and select multiple documents.
   - OR -
   Click **Select All**to select all the documents on the list. The caption of the Select All button changes to **Clear All**.
4. In the **Description** field, enter a description for the auto activity.
5. Click on the **Trigger** tab.



6. Select appropriate values from the drop-down lists.

   The 'Changes From' drop-down list is used in conjunction with the 'Changed To' drop- down list.

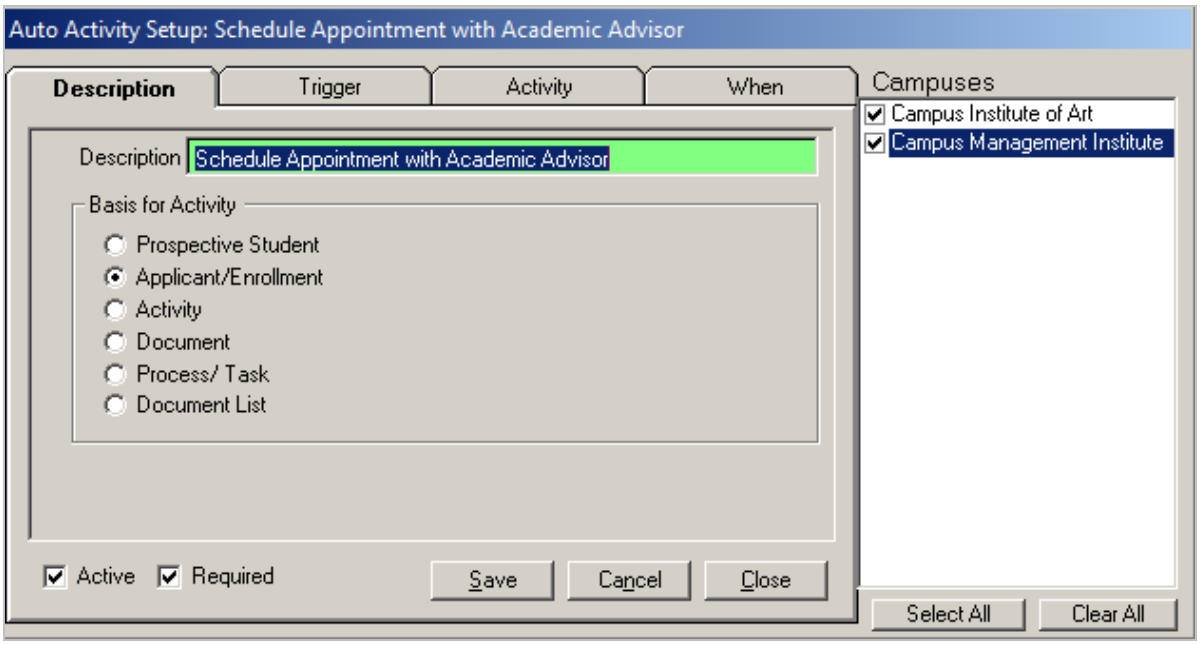
   Conditions when 'Changes From' is Enabled/Disabled

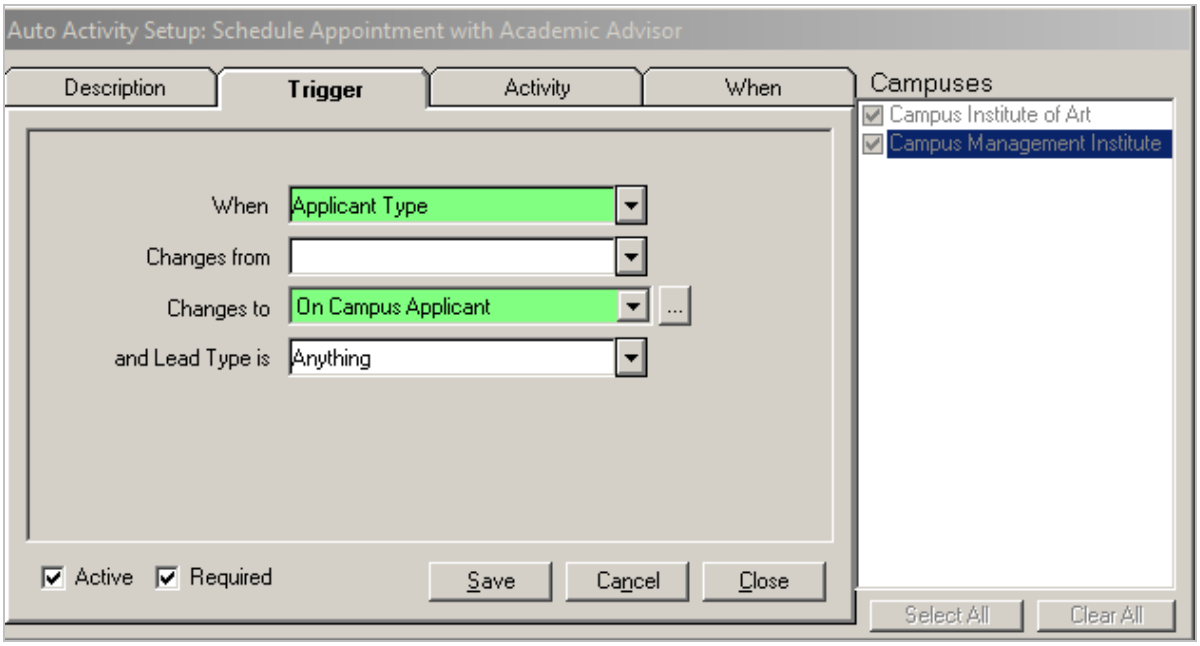
Activities For	When	Changes From - Enabled
Prospective Student	Status Lead Type SEVIS Transmission Status VISA Type	Yes Yes No No
Applicant Enrollment	Status Enroll Grade Level - (Auto Change) FA A/Y Grade Level - (Auto Change) Enrollment Status Change Enrollment status changes to Leave of Absence Account Status Added Ledger Transaction Added Payment Posted Collection Status Added	Yes Yes Yes Yes No - Because system allows multiples Yes No No No
Activity	Status Result	Yes Yes
Document	Document Status	Yes
Process /Task	Process / Task occurs	No

7. Click **Close** to close the form.

Activity Scheduling on the Basis of Applicant Type

1. When you select the **Applicant/Enrollment** option on the Description tab and then click on the Trigger tab, Applicant Type is displayed in the 'When' drop-down. If you select this value in the drop-down, the 'Changes From' and 'Changes To' fields have the corresponding value.
2. When you create a schedule activity for Applicant Type and the Applicant Type of the applicant is changed, that activity is triggered.



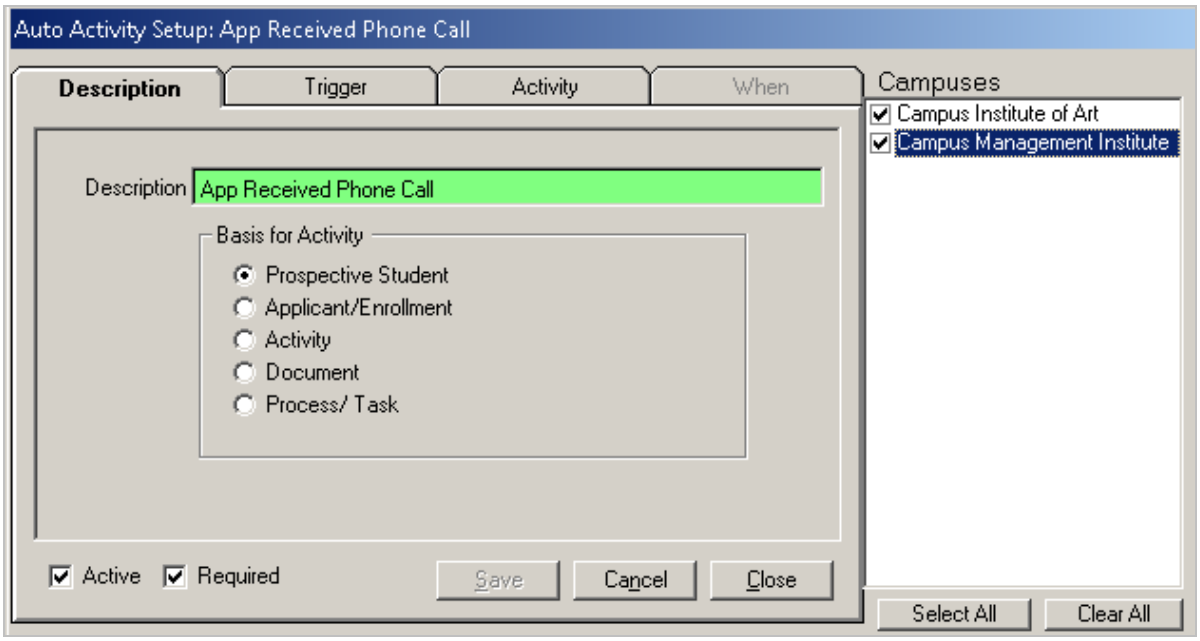


Adding an Auto Activity

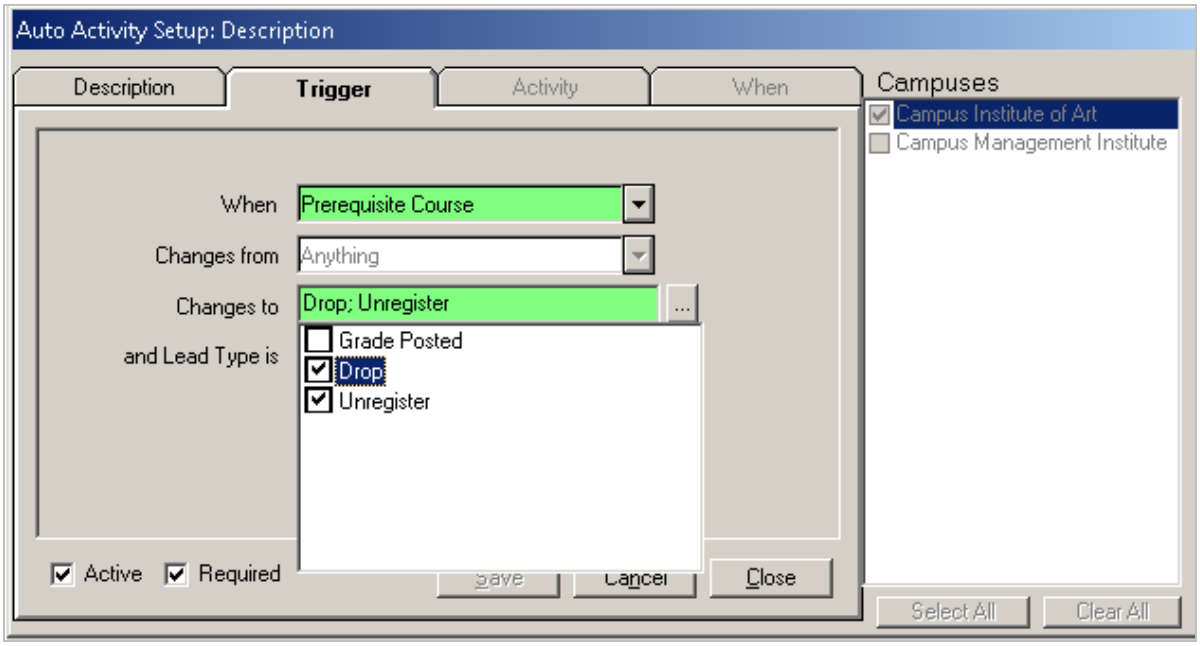
To add a new automatically assigned activity to the Contact Manager module:

1. Navigate to **Daily > Contact Manager > Schedule Activities**. The Activity Scheduler form is displayed.
2. Click **Add** to begin a new automatic activity. The Auto Activity Setup form is displayed.

   When you add a new automatic activity, only the Description tab is available. After you complete the entry and selections on the Description tab, the Trigger tab becomes available. After you complete the Trigger tab, the Activity tab becomes available. After you complete the Activity tab, the When tab becomes available.



3. On the **Description** tab, enter a description of the new activity. Select one of the **Basis for Activity** options. In most cases, this will be the Prospective Student option because things that are related to the student are most often the cause of actions taken by staff members. Click on the **Active** and **Required** check boxes as necessary.
4. The **Campuses** panel of this tab indicates the campuses to which you may assign activities. Check the box to which your activity applies. You have permission to schedule activities only to the campus(es) that appear here.
5. On the **Trigger** tab, select values from each list box: **When**, **Changes From**, **Changes to**, and **Lead Type is**. Triggers based on Enrollment Status take effect at 11 p.m. on the date that the trigger was set, unless the school chooses a different time. You can change Enrollment status more than once daily, but the Enrollment status that is displayed at 11 p.m. is the status that is updated.



Note regarding use of the Prerequisite Course trigger (basis for activity Applicant/Enrollment):

Selecting the Prerequisite Course option for When disables the Changes from field (Anything option appears dimmed), and also makes available the options Grade Posted, Drop and Unregister for the Changes to field. This allows an Academic Administrator, for example, to schedule an Activity that is triggered when a grade is posted that causes a prerequisite rule to fail, or when a prerequisite course is dropped or unregistered. The new merge field Prerequisite Course can be used when configuring the activity to be triggered.

Note: A trigger for an activity regarding an Incomplete will be based on the configuration for number of days before or after the expiration deadline date. For triggering the activity, select Grades for When, and Incomplete Grade for Changes from (Changes to is not needed because the activity needs to be triggered off whenever the incomplete grade is changed). Upon posting (manually or automatically) the replacement grade, the activity will be triggered.

6. On the **Activity** tab, select one of the activity options. Also select a **Template** and an **Assign to** person as necessary. If you select **Advisor Group** or **Staff Member**, a list box will appear beside your selection. Select an advisor group or staff member.

   Activities that cannot be assigned to the specific advisor for a student will be assigned to the default campus advisor, and the activity can then be reassigned to the appropriate person on campus.

   When assigning activities to default advisors, the following advisor group codes apply:

   - FA - Default 'Financial Aid Advisor'
   - SA - Default 'Student Accounts Advisor'
   - AD - Default 'Academic Advisor'
   - PL - Default 'Career Services Advisor'
   - LM - Default 'Loan Management Advisor'
   - NI - Default 'International Advisor'
   - OTH -Default 'Additional Advisor'.

   For automatically triggered activities that are assigned to an advisor group: when the student's record does not contain the appropriate advisor, the system will assign the activity to the advisor configured as the default advisor for that campus, according to the advisor group code.

When an advisor of the type specified on the scheduled activity does not exist for the student and a default advisor for the applicable type is not configured for the campus, then the system will assign the activity to the student without an associated advisor or staff member.

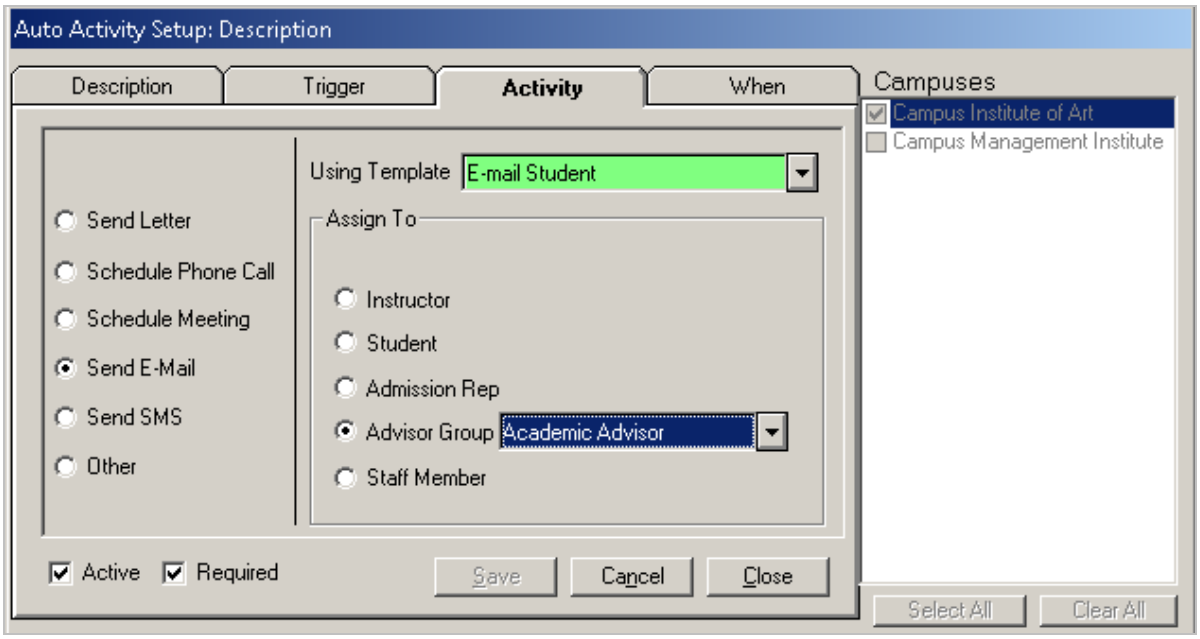
For automatically triggered activities that are assigned to an advisor group, the system will verify that the student's assigned advisor is an active staff member. When the staff member is inactive, the activity will be assigned to the advisor configured as the default advisor for that campus, according to the appropriate advisor group code.

When an advisor of the type specified on the scheduled activity is an inactive staff member or its account status is locked and the default campus advisor is an inactive staff member or is not configured, the system will assign the activity to the student without an associated advisor or staff member.

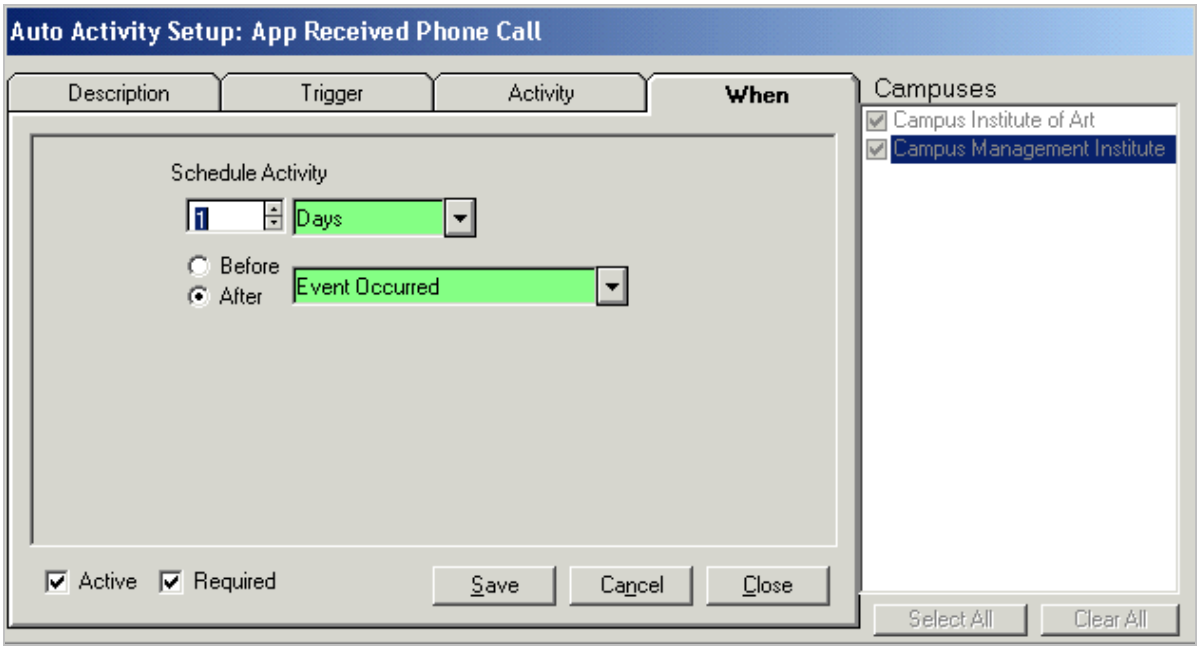
When advisor is not assigned to a student at the time of enrollment and the default advisor for that campus is different from the advisor for which activity is scheduled, then the system will check if the default campus advisor is active (not inactive or locked) before the activity is assigned to that default campus advisor for that particular module.

When an advisor assigned to a student is inactive or the account status is locked, and the default advisor for that campus is different from the advisor for which activity is scheduled, then the system will check if the default campus advisor is active (not inactive or locked) before the activity is assigned to the default campus advisor for that particular module.

When an advisor assigned to a student is inactive or the account status is locked, and the default advisor for that campus is different from the advisor for which activity is scheduled, then the system will check if the default campus advisor is inactive or locked before the activity is assigned to the student without an associated advisor or staff member for that particular module.



7. On the **When** tab, select parameters for the due date of the automatic activity. Select a **Control Event**.



Complete the entry or selection of the automatic activity parameters on the When tab.

8. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Notes:

If you are scheduling automatic activities based on when a student's **Leave of Absence** is scheduled to end, you can choose to schedule activities a specific number of days before or after the LOA return date.

Certain actions are restricted based upon activities that have been associated with a trigger, but have not been assigned to a student. To prevent these actions for unused activities with associated triggers, the following rules apply:

- An activity cannot be deleted or made inactive if it is associated with at least one active scheduled activity trigger.
- A trigger cannot be reactivated if the associated activity is not active.
- A campus cannot be disassociated from an activity if a scheduled activity trigger is associated with that activity and campus.

Editing an Auto Activity

To edit an automatically assigned activity in the Contact Manager module:

1. Navigate to **Daily** > **Contact Manager** > Schedule Activities option. The Activity Scheduler form is displayed.
2. Select an automatic activity in the list and then click **Edit**. Alternatively, you can simply double-click an activity in the list to open it for editing. The **Auto Activity Setup** dialog box will appear. There are four tabs in this dialog. They are labeled as Description, Trigger, Activity, and When.
3. Click the **Description** tab and edit the description if necessary. Select one of the four **Basis for Activity** options. In most cases, this will be the **Prospective Student** option because things that are related to the student are most often the cause of actions taken by staff members. Click the **Active** and **Required** check boxes as necessary.
4. The **Campuses** panel of this tab indicates the campuses to which you may assign activities. Check the box to which your activity applies. You have permission to schedule activities only to the campus(es) that appear here.
5. Click the **Trigger** tab. Change the selections in the **When**, **Changes From**, **Changes to**, and **Lead Type is** list boxes if necessary. Triggers that are based on Enrollment Status take effect at 11 P.M. on the date that the trigger was set, unless the school chooses a different time. Users can change Enrollment status more than once daily, but the Enrollment status that appears at 11 P.M. is the status that is updated.
6. Click the **Activity** tab. Select one of the activity options. Select a **Template** and an **Assign to** person, as necessary. If you select **Advisor Group** or **Staff Member**, a list box will appear beside your selection. Select an advisor group or staff member from the list.

   Activities that cannot be assigned to the specific advisor for a student will be assigned to the default campus advisor, and the activity can then be reassigned to the appropriate person on campus.

   When assigning activities to default advisors, the following advisor group codes apply:

   - FA - Default 'Financial Aid Advisor'
   - SA - Default 'Student Accounts Advisor'
   - PL - Default 'Career Services Advisor'
   - LM - Default 'Loan Management Advisor'
   - NI - Default 'International Advisor'
   - OTH -Default 'Additional Advisor'.

   For automatically triggered activities that are assigned to an advisor group; when the student's record does not contain the appropriate advisor, the system will assign the activity to the appropriate advisor configured for that campus' default advisor according to the advisor group code.

   When an advisor of the type specified on the scheduled activity does not exist for the student and a default advisor for the applicable type is not configured for the campus, then the system will assign the activity to the student without an associated advisor or staff member.

   For automatically triggered activities that are assigned to an advisor group, the system will verify the student's assigned advisor is an active staff member. When the staff member is inactive, the activity will be assigned to the appropriate advisor configured for that campus' default advisor according to the appropriate advisor group code.

   When an advisor of the type specified on the scheduled activity is an inactive staff member or its account status is locked and the default campus advisor is an inactive staff member or is not configured, the system will assign the activity to the student without an associated advisor or staff member.

When advisor is not assigned to a student at the time of enrollment and the default advisor for that campus is different from the advisor for which activity is scheduled, then the system will check if the default campus advisor is active (not inactive or locked) before the activity is assigned to that default campus advisor for that particular module.

When an advisor assigned to a student is inactive or its account status is locked, and the default advisor for that campus is different from the advisor for which activity is scheduled, then the system will check if the default campus advisor is active (not inactive or locked) before the activity is assigned to the default campus advisor for that particular module.

When an advisor assigned to a student is inactive or its account status is locked, and the default advisor for that campus is different from the advisor for which activity is scheduled, then the system will check if the default campus advisor is inactive or locked, before the activity is assigned to the student without an associated advisor or staff member for that particular module.

7. Click the **When** tab. Select the appropriate parameters for the due date of the automatic activity. Select a **Control Event** from the list box.
8. When you complete the entry or selection of the automatic activity parameters on the When form, click **Save** to save your new automatic activity. Click **Close** to close the form.

   Note: Business rules are incorporated to restrict certain actions upon activities that have been associated with a trigger, but have not been assigned to a student. To prevent these actions for unused activities with associated triggers, the following rules apply:

   - An activity cannot be deleted or made inactive if it is associated with at least one active scheduled activity trigger.
   - A trigger cannot be reactivated if the associated activity is not active.
   - A campus cannot be disassociated from an activity if a scheduled activity trigger is associated with that activity and campus.
   - When an activity result change triggers a new activity that is assigned to a nonexistent Admissions Rep, the new activity will be assigned to the CMHOLD staff member. CMHOLD is made available upon installation of CampusNexus Student. You can filter activities in Contact Manager by CMHOLD and then reassign the activity to an Admissions Rep.

Deleting an Auto Activity

To delete an automatically assigned activity in the Contact Manager module:

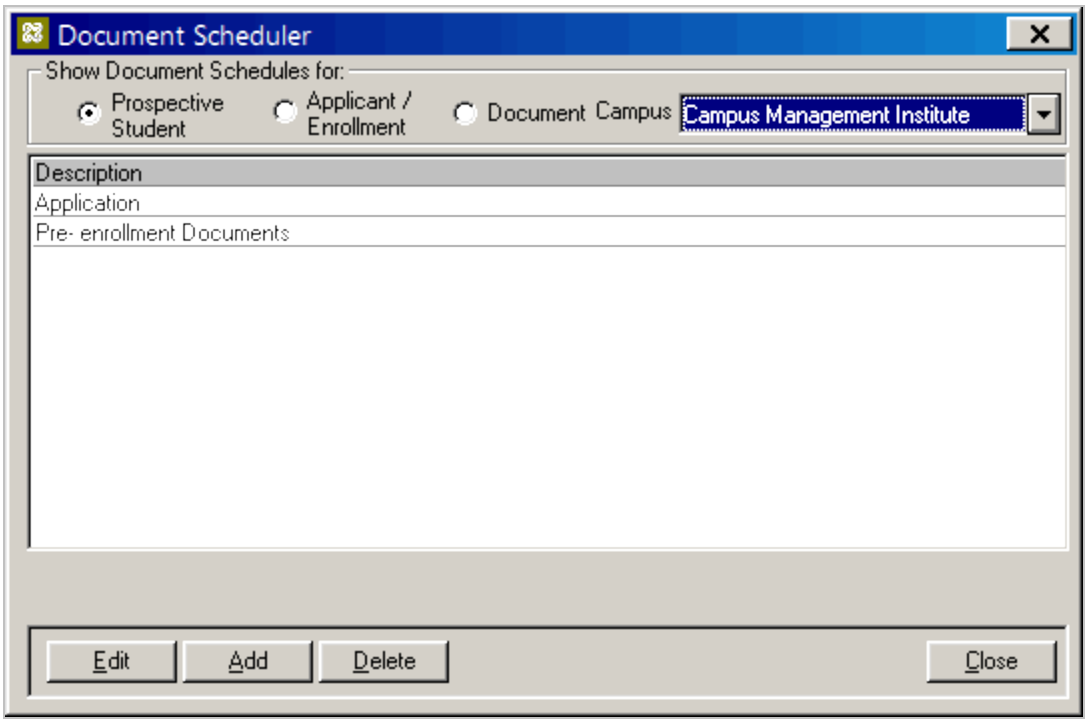
1. Navigate to **Daily** > **Contact Manager** > **Schedule Activities**. The Activity Scheduler form is displayed.
2. Select the automatic activity in the list that you want to remove and then click **Delete**.
3. Click **Yes** on the confirmation message.

Scheduling Documents

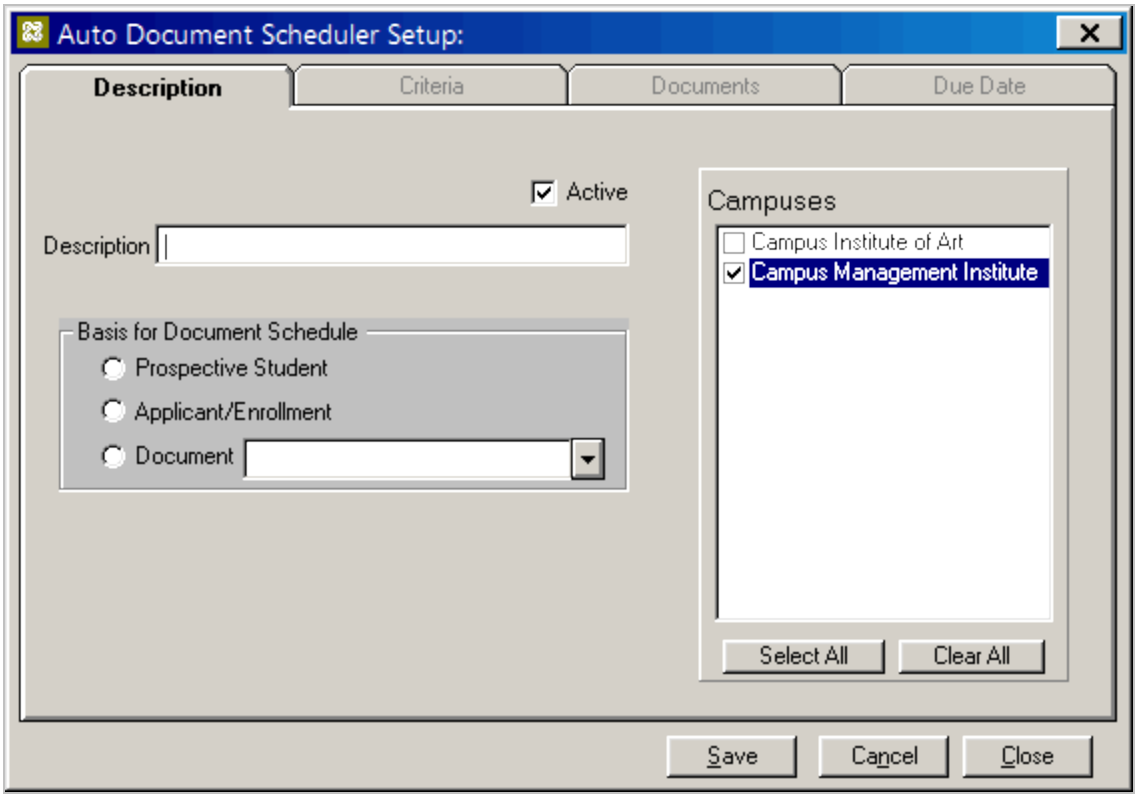
You can add, edit, and delete document schedules. The process flow is similar to the "Schedule Activities" option. Scheduling of documents can be based on pre-enrollment, enrollment, student housing requirements, and document-related events. You can select individual documents to schedule or lists of documents to schedule. You can also select the criteria by which the documents are scheduled and the date when the documents are due to be received by your school.

To add or edit document schedules:

1. Navigate to **Daily > Contact Manager > Schedule Documents**. The Document Scheduler form is displayed.



2. In the *Show Document Schedules for:* area, select **Prospective Student**, **Applicant/Enrollment**, or **Document**.
3. Select a **Campus**.
4. Click **Add** to add a new Document Schedule, or select a row on the grid and click **Edit** to view or change the details. CampusNexus Student displays the Auto Document Scheduler Setup form (frmCmDocSchedDetail).



a. In the *Basis for the Document Schedule* area, select **Prospective Student**, **Applicant/Enrollment**, or **Document**.

b. Select the **Campuses** to which this document apply. The only campuses displayed in this field are those for which you are authorized to schedule documents. You can add and remove campuses one-by-one, or use the **Select All** and **Clear All** buttons.

c. When you select **Document** as the basis for the document schedule, the drop-down list to the right of the Document option is enabled. Select the document that triggers the scheduling of the documents that will be attached to this document schedule in a later step.

All fields on this form are required and cannot be left blank.

If you are adding a document schedule, the **Description** tab of the form must be completed and saved before you can proceed to the **Criteria** tab.

5. Click **Save**. The Document Schedule (CmDocSchedule) table is updated.
6. Click the **Criteria** tab.
7. Enter your criteria selections according to the descriptions below.

   When you select the **Criteria** tab, the resulting form's appearance depends on the basis for the document schedule selected in the preceding form.

   Note the two tabs at the bottom of the page: **Edit Selection** and **View All Selection Criteria**. Start with **Edit Selection**. The **View All Selection Criteria** sub-tab is shown later in this topic.

There are three choices for the basis of the document schedule: **Pre Enrollment**, **Enrollment**, and **Document**. Selection options for each choice are as follows.

Prospective Student

Field	Description
Dependency Status	Based on the dependency status that is evaluated as a result of entering a FAFSA or importing an ISIR for your student. The Choices options are Dependent and Independent.
ISIR Comment Code	This information comes from the comment codes on ISIRs you import into CampusNexus Student. When you select this criterion, you must specify an award year prior to the choices list being built. If a document schedule is being edited, the award year field will be pre-populated with the Award Year. Once the award year is specified, the choices list is built by querying the Comments table. All rows where the Type is "ISIR" and the Award Year equals the award year specified by the user are included in the Choices list.
ISIR Verification Group	This information comes from the comment codes on ISIRs you import into CampusNexus Student. For the Verification Group code list to appear, you must specify an award year prior to the choices list being built. Select the ISIR Verification group and Verification Group options V1-V5 appear. These options have the same behavior as the ISIR Comment codes and SAR C flag. If the ISIR meets the proper criteria, it triggers the configured documents. The Verification Groups are populated on ISIRs with an Award Year of 2013-14 and greater.
SAR C Code set to Y	This information comes from the SAR C flag value from ISIRs you import into CampusNexus Student. When you select this criterion, you must specify an award year prior to specifying the criteria in the choices list. The choices for a SAR C flag are Y or blank. This will not come from any table.
Student Status	When used in a pre-enrollment document schedule, this information is based on what is displayed in the "Status" field in the Student Master. When you select this option, the Choices section lists all rows from SySchoolStatus where SyStatus.Category is L, N, E, A, T, or P, and the campus group criteria matches the campus group specified on the document schedule. If the document schedule is being edited, the CampusNexus Student checks all statuses that currently make up the specified status criteria for this document schedule.

Applicant/Enrollment

Field	Description
Applicant Type	When you click on the Criteria tab of Document Scheduling, Applicant Type is available under the Items List. Clicking on Applicant Type displays the corresponding values in the Values section, where you can then select one or more of the values displayed.
Dependency Status	Based on the dependency status that is evaluated as a result of entering a FAFSA or importing an ISIR for your student. The Choices list options are Dependent and Independent.

Field	Description
Enrollment Status	Based on the value in the "Enroll Status" column on the "Date/Status" tab in the Enrollment folder for the student enrollment. When you select this option, the Choices section lists all rows from the Attendance Status table. If the document schedule is being edited, CampusNexus Student checks all statuses that currently make up the specified enrollment status criteria for this document schedule.
FA Fund Source	Based on the individual package details in the Packaging folder for the appropriate Award Year and student Enrollment. You can see this value in the Fund Source column. When you select this option, the Choices section lists all rows from the Fund Source table where the campus group criteria matches the campus group specified on the document schedule. If the document schedule is being edited, CampusNexus Student checks all statuses that currently make up the specified FA fund source criteria for this document schedule.
FA Packaging Status	Based on the status information in the Packaging folder for the appropriate Award Year and student Enrollment. You can see this value in the "Package Status" column. When you select this option, the Choices section lists all rows from the Packaging Status table. If the document schedule is being edited, CampusNexus Student checks all statuses that currently make up the specified FA packaging status criteria for this document schedule.
Housing Required	Based on the value for "Housing Required" in the Housing Information form of the Student Bar. When you select this option, you can trigger documents based on a student's Housing record being updated to indicate Housing is required. For example, you can trigger documents such as proof of immunizations, and proof of student health insurance,
ISIR Comment Code	This information comes from the comment codes on ISIRs you import into CampusNexus Student. When you select this criterion, you must specify an award year prior to the choices list being built. If a document schedule is being edited, the award year field will be pre-populated with the Award Year. Once the award year is specified, the choices list is built by querying the Comments table. All rows where the Type is "ISIR" and the Award Year equals the award year specified by the user will be included in the Choices list.
ISIR Verification Group	This information comes from the comment codes on ISIRs you import into CampusNexus Student. For the Verification Group code list to appear, you must specify an award year prior to the choices list being built. Select the ISIR Verification group and Verification Group options V1-V5 appear. These options have the same behavior as the ISIR Comment codes and SAR C flag. If the ISIR meets the proper criteria, it triggers the configured documents. The Verification Groups are populated on ISIRs with an Award Year of 2013-14 and greater.
Placement Status	Based on the value in the "Placement Status" field on the "Exit Interview" tab of the Placement folder for the appropriate student Enrollment. When you select this option, the Choices section lists all rows from the School Status table where the Status Category is G and the campus group criteria matches the campus group specified on the document schedule. If the document schedule is being edited, CampusNexus Student checks all placement statuses that currently make up the specified placement status criteria for this document schedule.

Field	Description
Placement Skills	Based on the value in the "Skills" column on the "Student Job Skills/Titles" tab of the Placement folder for the appropriate student Enrollment. When you select this option, the Choices section lists all rows from the Skills table. If the document schedule is being edited, CampusNexus Student checks all placement skills that currently make up the specified skills criteria for this document schedule.
SAR C Flag	This information comes from the SAR C flag value from ISIRs you import into CampusNexus Student. When you select this criterion, you must specify an award year prior to specifying the criteria in the choices list. The choices for a SAR C flag are Y or blank. This will not come from any table.
Student Status	When used in a enrollment document schedule, this information is based on what is displayed in the "School Status" column in the Enrollment folder. When you select this option, the Choices section will list all rows from SySchoolStatus where SyStatus.Category is L, N, E, A, T, or P, and the campus group criteria matches the campus group specified on the document schedule. If the document schedule is being edited, CampusNexus Student checks all statuses that currently make up the specified status criteria for this document schedule.

Documents

Field	Description
Document Status	Based on the information in the "Status" column in the Document folder for the student. When you select this option, the Choices section lists all rows from the Document Status table. If the document schedule is being edited, CampusNexus Student checks all document statuses that currently make up the specified document status criteria for this document schedule.

8. Click the **Documents** tab. The system displays the **Auto Document Scheduler Setup** form for the specific document.
9. Select the **Documents** or **Document Lists** to be automatically scheduled.

   The next step in the wizard is to specify which documents will be scheduled for a student if the student's data satisfies the criteria specified in the previous form.

Document Sub-Page

When this form is initially activated, the **Document** sub- tab is selected by default. The list displayed below includes all rows from the Document Type table that satisfy the campus group criteria and are not already included in the selected document list. Highlight a document in the left box and click **Select** to add it to the Selected Documents list. Highlight a selected document in the right box and click the **Remove** button to remove it from the Selected Documents list.

Document List Sub-Page

If you select the Document List Sub-Page, the drop-down list below changes from a listing of all documents on file to a list of all Document Lists on file that satisfy the campus group criteria for the document schedule. Highlight a

Document List in the left box and click **Select** to add the listed documents to the Selected Documents list. Highlight a selected document in the right box and click **Remove** to remove it from the Selected Documents list.

The only exception to this is if a document contained in the Document List already is in the Selected Document list. When you click Save, the CmDocScheduleDocuments table is updated.

10. Click the **Due Date** tab. The Document Due Date text boxes appear.
11. Enter a numeric value and select a time frame (Days, Weeks, or Months).

    Specify the criteria to calculate the due date for each document scheduled for a student. These criteria are used only if no due date criteria exist on the individual document setup. When you select Save, CampusNexus Student updates the following columns in CmDocSchedule for the document schedule row being edited:

    DueDateType - A

    DueDateDays -

    - If you select **Days**, the number you enter.
    - If you select **Weeks**, the number you enter multiplied by 7.
    - If you select **Months**, the number you enter multiplied by 30.
12. Click **Save** to save your Document Schedule.
13. Click **Close** to close the form.

Letters Overview

Many procedures that you will encounter during your daily operations require that you send letters to one or more students or employers. You can establish form letters into which you can merge data from the students' or employer's records. Predefined automatic activities can be set up to trigger letter production.

Letter generation begins in the **Lists** menu under the **Contact Manager** option. From the Setup - Contact Manager Lists form, you can add new letter activities, edit existing ones, and delete or disable them. You can also print a list of the activities. Refer to Activities Codes and Activities for more detail about adding and maintaining letter activities.

Once a new letter sending activity has been added to the Contact Manager List, you must go to the **Daily** operations menu for **Contact Manager** to write the new form letter, or edit an existing one. Once you complete the form letter, you can schedule the letter to be sent to one student or employer, or a group of students or employers.

See Print Letters for detailed instructions for editing and printing of letters. See also Print Employer Letters, Letter Activity, System Settings for Letter Path.

Editing Letters

The Edit Letter functionality is accessible via the Print Letters screen. Follow the Print Letter instructions, and click **Edit Letter**. Follow the instructions below to modify a form letter.

See also Activities, Edit Employer Letter, Print Letter Overview, and Employer Letter Overview.

See Mail Merge Codes for more information about the data items that can be included with the various types of letters.

To edit a letter:

1. If your letter is new, CampusNexus Student starts Microsoft Word with a blank page with a file name based on the Code specified in the Activities setup procedure.

   If your letter is currently exists, CampusNexus Student starts Microsoft Word with the file you selected.

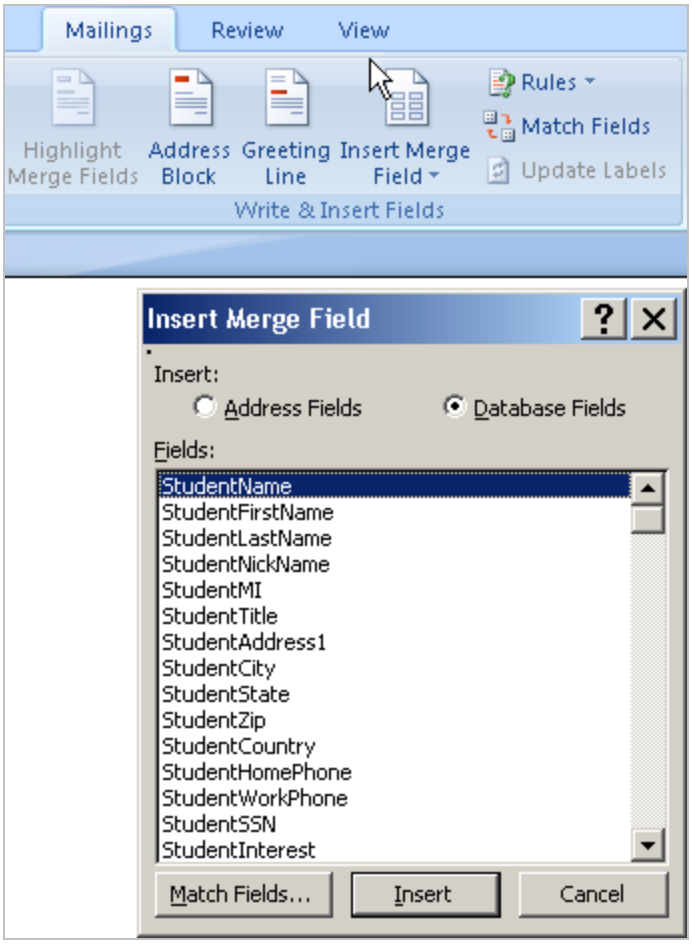
   Note: CampusNexus Student version 15.2 supports the `.docx` extension for Microsoft Word files.

   If you created a `.doc` file and `.docx` file for the same Activity Code, for example *Program_Start.doc* and *Program_Start.docx*, remove one of the files from the server where the files are stored to enable CampusNexus Student to open the correct file for the selected Activity code.

2. Work in the Word document just as you would if you were not coming from CampusNexus Student.

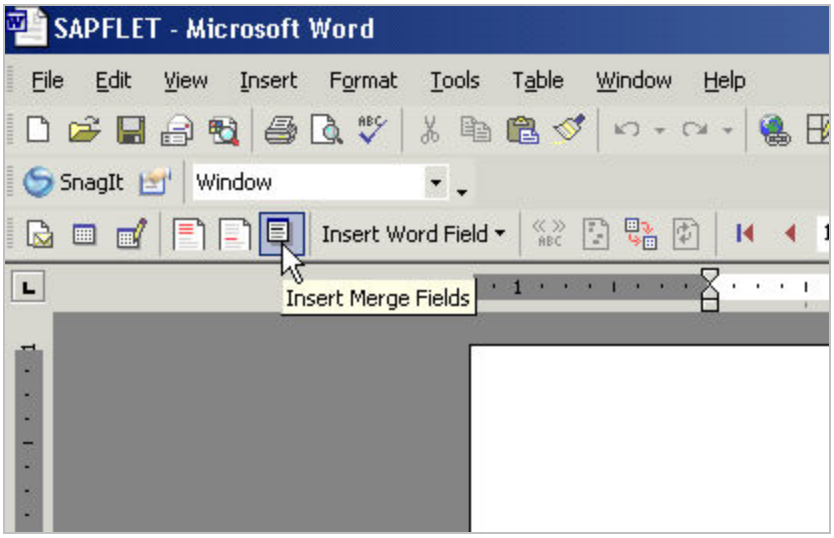
   When Word is started from within CampusNexus Student, the **Insert Merge Field** with a list of CampusNexus Student data fields is displayed in the **Mailings** tab, within the **Write & Insert Fields** group.

   The following example shows the Insert Merge Field with its list of CampusNexus Student data fields. These fields can be inserted at any point in your letter.



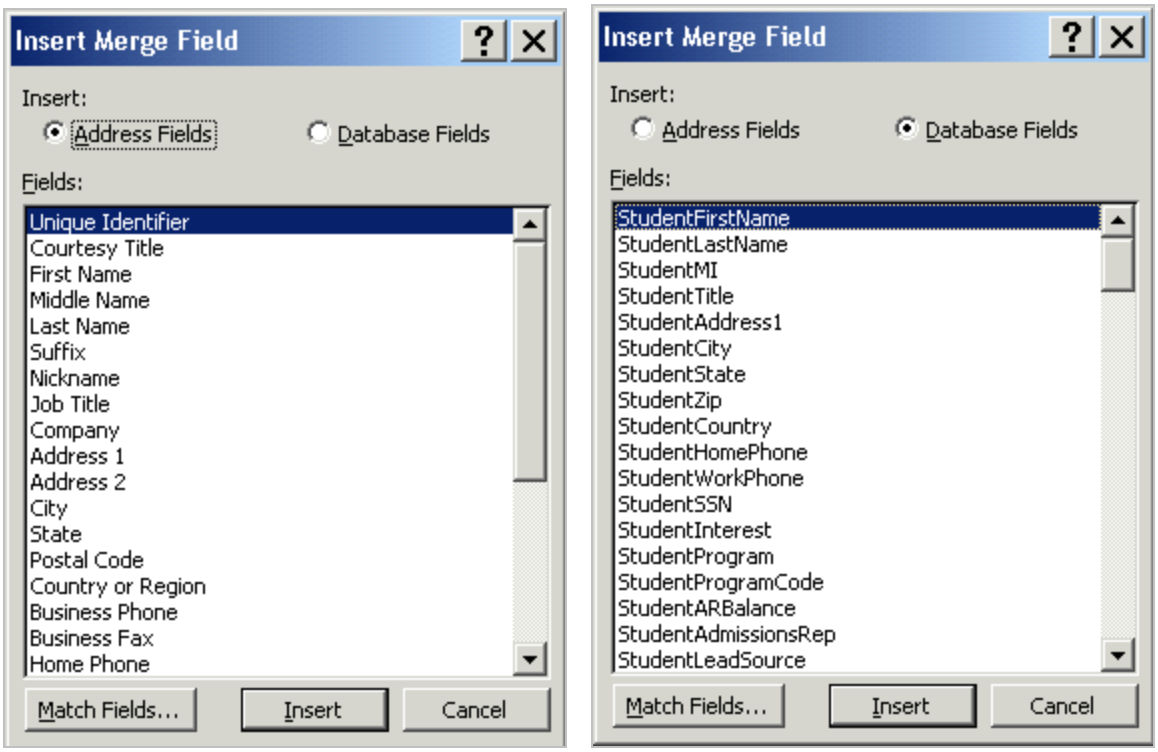
3. To insert a merge field in your letter, place the cursor at the location where the field is required. Click **Insert Merge Field** on the Word toolbar. The list of merge fields is displayed. Click the field on the list to insert it in the letter.

   When printing any information from the Enrollment table, only the information from the enrollment with the highest enroll date is printed.

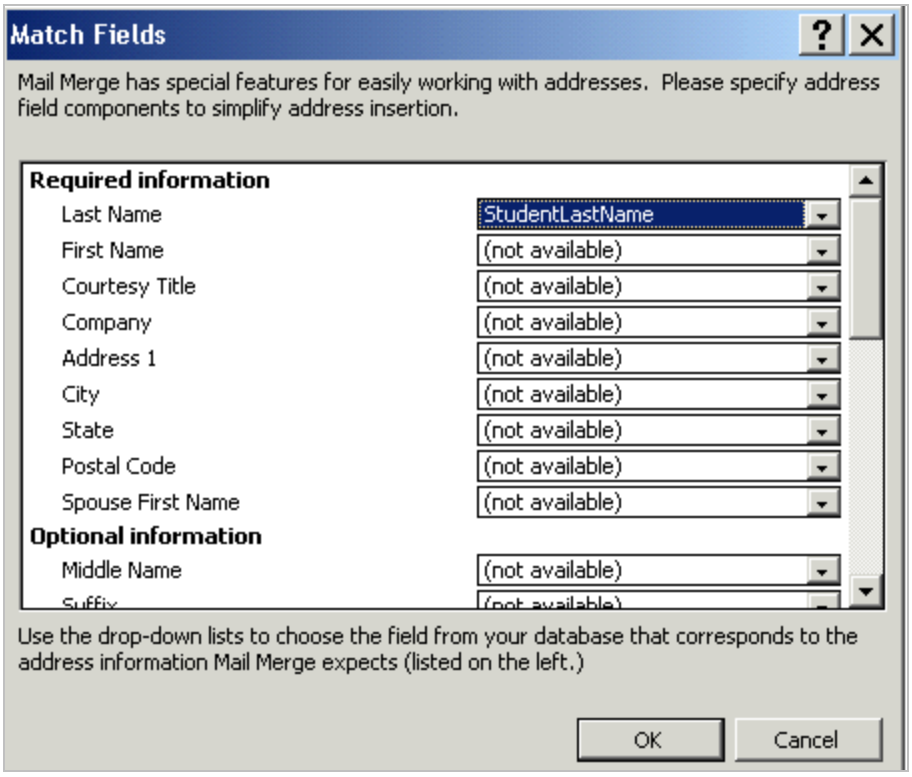


4. You can select as many merge fields as you like to incorporate into your letter. CampusNexus Student provides

address and database fields.

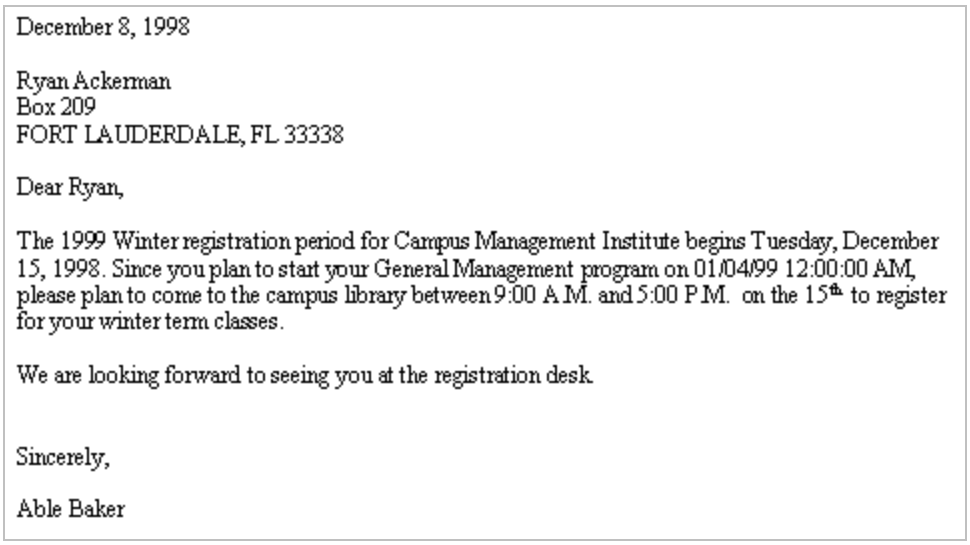


5. The **Match Fields** form is displayed when the **Match Fields** button is selected. Click next to your database field that you would like to associate with the mail merge field displayed on the left hand side of the screen. A list of database fields is displayed that you can select for each mail merge field listed. Click **OK** when all of your selections are made.



6. After you finish composing your form letter, **Save** your letter in Word. Then **Exit** from the Word program. You will be returned to CampusNexus Student.

The letter below is a product of merging data from the student database with the form letter in the previous Microsoft Word example.



December 8, 1998

Ryan Ackerman
Box 209
FORT LAUDERDALE, FL 33338

Dear Ryan,

The 1999 Winter registration period for Campus Management Institute begins Tuesday, December 15, 1998. Since you plan to start your General Management program on 01/04/99 12:00:00 AM, please plan to come to the campus library between 9:00 A.M. and 5:00 P.M. on the 15th to register for your winter term classes.

We are looking forward to seeing you at the registration desk.

Sincerely,

Able Baker

7. Review the letter. If the letter is correct, use the normal Word print functions to print your letter.
8. After you finish printing your form letter, **Exit** from the Word. Word will ask if you want to save the changes you made to the Form Letters file. This is the merged letter file. Answer **Yes** or **No**.
9. Word also asks if you want to save changes to the form letter file (one with the field codes). Answer **No**.
10. You are returned to Print Letters form in CampusNexus Student.

Using Ledger Merge Fields in Letter Activities

When one or more merge fields <<LedgerDate>>, <<LedgerAmount>>, and <<LedgerDescrip>> are used within a letter activity, all ledger transactions are listed, not just the last transaction. One, two, or all three ledger merge fields (description, amount, date) can be used in the template, and a specific table format is applied when the fields are replaced with data and the letters are prepared for printing. The location of the first ledger merge field in the template determines the start of the table in the printed letter, and the order of the columns, left to right, is always the same: Date, then Amount, then Description.

Examples

```
<<LedgerDate>> <<LedgerAmount>> <<LedgerDescrip>>
```

will show in the following table format:

```
Date Amount Description
```

```
<<LedgerDescrip>> <<LedgerDate>>
```

will show in the following table format:

```
Date Description
```

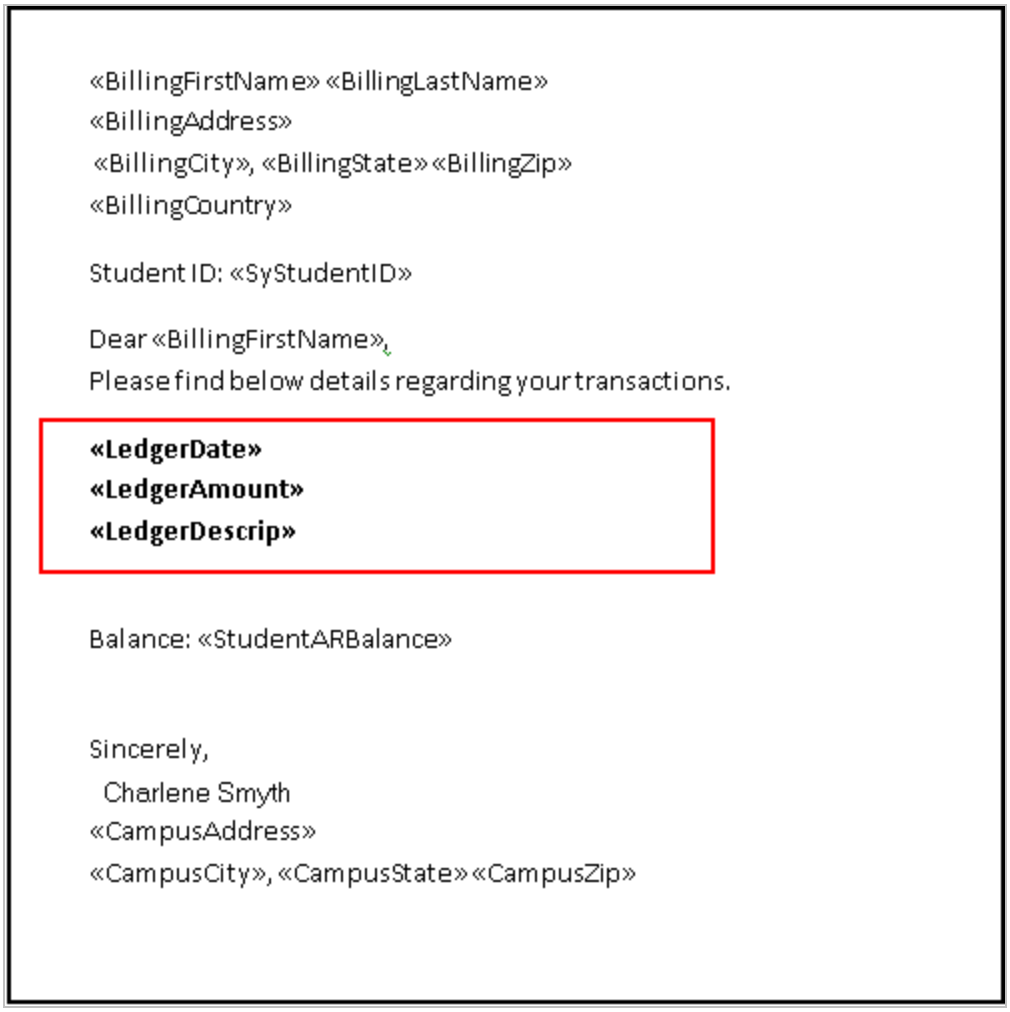
```
<<LedgerDescrip>>
```

will show in the following table format:

Description

Refer to the illustrations below for an example of a letter template containing ledger merge fields and the corresponding printed output.

Sample Template Containing Ledger Merge Fields



Sample Printed Letter Containing Merged Ledger Data

Sara Baig
1223 You Will Always Know St.
Ft. Lauderdale, FL 33318

Student ID: 26942

Dear Sara,
Please find below details regarding your transactions.

Date	Amount	Description
02/18/2000	200.00	Deposit Received
02/21/2000	6000.00	Tuition
02/21/2000	100.00	Student Fees
03/03/2000	-60.00	Refund - Student
05/31/2001	971.00	Federal Direct Subsidized Loan
06/11/2002	5.00	Deposit
06/27/2002	450.00	Art Supplies
03/26/2003	23.00	Food Service

(continued ...)

Balance: 19195.50

Sincerely,
Charlene Smyth
770 Yamato Road Suite 40
Boca Raton, FL 33431

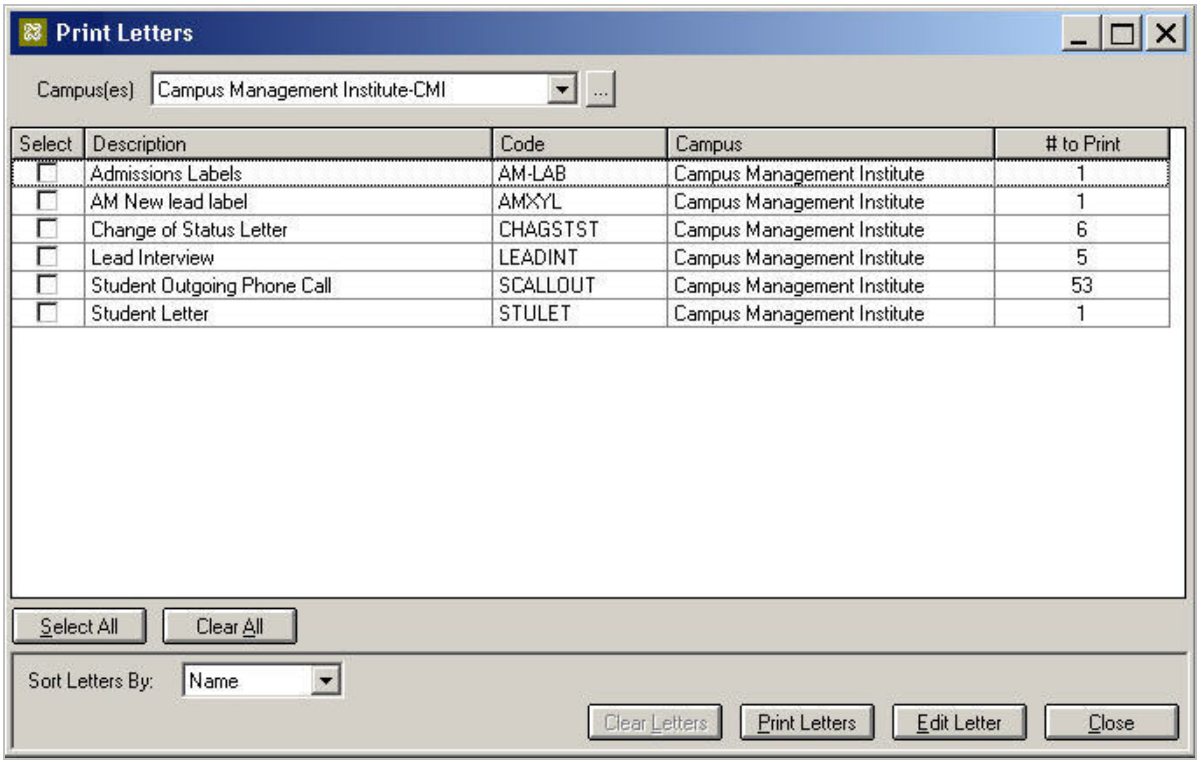
Printing Letters

You must configure letter activities before you can print form letters in a batch mode. You can then print the batch letters manually or automatically. See also Letter Activity, Print Letter Overview, Employer Letters Overview, Print Employer Letters, System Settings for Letter path, Edit Letter, Edit Employer Letters.

Note: When printing any information from the Enrollment table, only the information from the enrollment with the highest enroll date will be printed.

To clear, edit, or print Student form letters manually:

1. Navigate to Daily > Contact Manager > Letters or **Daily > Career Services > Print Employer Letters**. The Print Letters form is displayed.



2. Select a campus from the **Campus(es)** drop-down list or multiple campuses using the ... button for which letters are to be edited or printed. CampusNexus Student displays only the campuses to which you have access. Only active letters are displayed.
3. Choose one or more check boxes from the **Select** column to select one or multiple letters to print. You may also click the **Select All** or **Clear All** buttons to select/deselect the letters in this column.

   Note: The **Campus** column displays which campus the letter is associated with.
4. Click the **Print Letters** button to print the selected letter(s), or click the **Edit Letter** button to modify the letter.

   Note: When selecting the **Edit Letter** button, you can only select one letter at a time.

Clear Letters

Note: The Clear Letters button is only visible to users that have Delete letter permission.

1. Select a letter(s) from the list and click **Clear Letters**.
2. A warning message is displayed. Click **OK** to remove the letter(s) from the list. If **Cancel** is selected, the letter(s) will not be removed from the list.
3. You are returned to the **Print Letters** form.

Print Letters

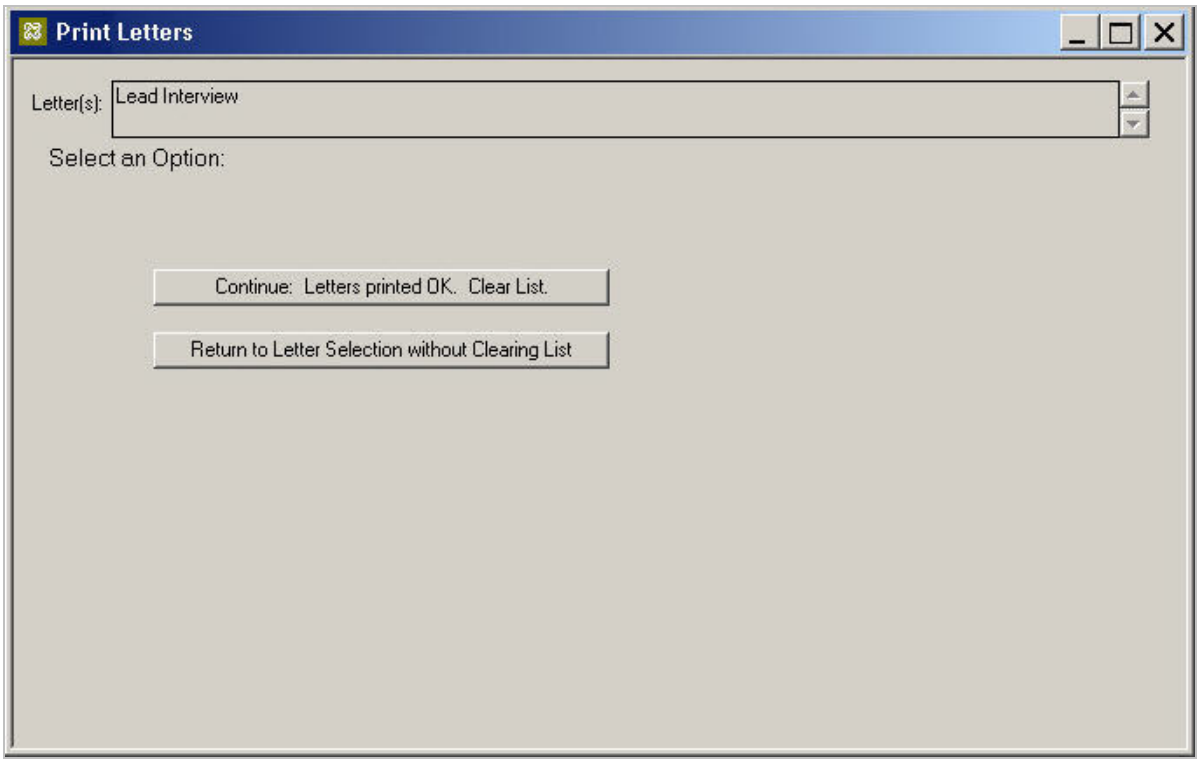
1. When the **Print Letters** button is selected, two Microsoft Word documents will open for each letter selected. One document contains the template and the other contains the actual contents of the letter(s). The document containing the contents will have the number of pages equal to the number in the **# to Print** column.

   Note: You can edit the template if you have Write access permissions to the path where the *.doc template file is located.

   The application will open Microsoft Word and will display your selected letters one after the other. If the letters appear to be correct, use the normal Microsoft Word print function to print the letters. Once you have finished printing, close the letters. The Microsoft Word application will prompt you to save any changes you may have made to the letters (these are the merged letter files). You may select **Yes** or **No**.

   Microsoft Word may prompt you with a message asking if you want to replace the Normal.dot template file. Select **No** if you use a different Normal.dot template file than CampusNexus Student does.

2. You will be returned to the following form. At the top of the form, a list of the **Letter(s)** that were selected to be printed is displayed, separated by semicolons.



3. Select **Continue: Letters printed OK. Clear List.** if you want different students or employers to receive this letter the next time it is printed.

   - OR -

Click **Return to Letter Selection without Clearing List** if you want the same students or employers to get this letter the next time it is printed.

4. You are returned to the Print Letters form.

Create Labels

This procedure is an easy way to create mailing labels with merge codes and postal bar codes. It is a three-part procedure involving both CampusNexus Student Contact Manager and the mail merge features of Microsoft Word.

- Part 1 - Assign an "Activity" Name to Your Label where you use Contact Manager to name an "activity" for your labels.
- Part 2 - Define the Labels with Merge Codes and Postal Bar Codes where you use Contact Manager to start the label definition process in Word, and then you use Microsoft Word to define the content of your label.
- Part 3 - Test Your New Mail Merge Labels where you test your work by printing some test labels for selected students.

Note: Because there are several steps in each part of this procedure, we suggest that you print this Help topic and keep the hard copy by your side while you work your way through it.

This procedure takes advantage of the Word feature that uses predetermined formats for **Avery Labels**. You can select the Avery mailing label that you use in your school. Determine which Avery Label format (number) you are going to use and how many lines of information can be printed on each label before you start the setup procedure.

For our example, we will set up a label format (Avery 5160) to be used on information packets that are sent to new leads.

Part 1 - Assign an "Activity" Name to Your Label

1. Navigate to **Lists > Contact Manager**. The Setup - Contact Manager Lists form is displayed. Click the Activities tab.
2. Click **Add** to add your new label.
3. When the **Activities Code Setup** form is displayed, enter the data for your label. We suggest that you use a prefix on the name to identify the department in which it is used. For Admissions, the prefix is "AM". Our example label will have a **Code** of AM-NL (up to eight characters in the code) and "AM-New Lead Label" for the **Description**.

   Department Prefixes

Prefix	Module
AD	Academic Records
AM	Admissions
BS	Bookstore/Inventory
CM	Contact Manager
DE	Distance Education
FA	Financial Aid
PL	Placement
SA	Student Accounts
SY	System

4. Select Letter for the **Event Type**.
5. Leave Duration at zero.

6. In the Contacts frame, enable the **Required** option for **Student**.
7. In the Send To box, select **Student**.
8. Click **Save** to save your new "activity" (label) and leave the form open for the next step.

Part 2 - Define the Labels with Merge Codes and Postal Bar Codes

1. Ensure that a folder exists to match the **Letter Path** setting in the **Setup > System > General** tab. If the folder does not exist, create one, or change the Letter Path setting to match a folder that does exist. The default path is `C:\Program Files\CMC\CampusNexus Student\Letters`.
2. Click **Edit Letter**. Because this is the first time we are accessing the "letter" file, the program has not yet created it. A message is displayed to ask you if you want to create one. Click **Yes** to create the letter file document **AM-NL.-doc** for our example and start your new label. CampusNexus Student displays a message in the lower left corner that says "Opening Word" until Word opens with a blank page. Be patient, it could take a few seconds.
3. If Word is not already maximized on your screen, maximize it (right-click on the task bar icon for the Word document and select **Maximize**).
4. From the Word menu, start the Mail Merge Wizard.
   Note: For Word 2003 or earlier: **Tools > Letters and Mailings > Mail Merge Wizard**; for Word 2007 or later: **Mailings > Start Mail Merge > Step-by-Step Merge Wizard**
5. When the Wizard is displayed, make sure that you are on **Step 1 of 6** (Step 1 of 6 is displayed unless the Wizard has been run before. If necessary, click **Previous** to return to Step 1 of 6.). Select **Labels** as the document type, and click **Next: Starting document** to continue.
6. When **Step 2 of 6** is displayed, click **Label options ...** to pick the label that your school uses in this situation. Select the **Tray** to be used on the printer. Click **OK** to accept the settings. Now you will see all your mail merge codes and bar codes formatted to your Avery label format. Then click **Next** to proceed to Step 3 of 6.
7. When **Step 3 of 6** is displayed, click **Next: Arrange your labels**. We will not be making any changes on Step 3 of 6.
8. When **Step 4 of 6** is displayed, place the cursor in the first label and click **Postal bar code**.
9. When the **Insert Postal Bar Code** form is displayed, select **StudentZip** from the drop-down menu, and click **OK** to save the change.
   Note: The message "ZIP code not valid!" indicates that the ZIP code data has not yet been loaded. This will happen during the merge process later.
10. Move the cursor to the second line on the first label. On the Mail Merge Wizard menu, click **More items**.
11. When the **Insert Merge Field** form is displayed, select a merge code for each field to appear in the label. For example, in the **Last Name** field, select the merge code **StudentLastName**. Continue to create the label format by adding the fields you require.
12. From the Mail Merge Wizard menu on **Step 4 of 6**, select **Update all labels** to duplicate the label format for every label, and click **Save** to save the changes.
13. **Save** and **Close** the document file **AM-NL.doc** and return to the CampusNexus Student **Activities Code Setup** form and click **Save** and **Close**.

You are ready to test your mail merge labels.

Part 3 - Test Your New Mail Merge Labels

To test your new labels, select a few leads or students and assign the "activity" that represents your new labels.

1. Select a student using the Recent Students list or the Search tool.
2. Select **View** > **Contact Manager > Activities**. The Contact History form is displayed.
3. Click **Add Activity** to open the Activity form.
4. Select the**Activity**from the drop-down list that represents your new label. In our example, this is "AM-New Lead Label".
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.
6. Repeat steps 1 through 5 for a few more students; at least enough students to fill a couple of rows of the label form so you can see how the spacing works out. When you have enough students (or leads) selected, go on to the next step.
7. Navigate to **Daily > Contact Manager > Letters**. The Print Letters form is displayed.
8. Select the grid line that describes your new labels. Under **# to Print**, you should see the number of student records you selected for the test. In our example, we will print labels for six (6) students.
9. Click **Print Letter**. CampusNexus Student calls Microsoft Word and Word opens the file containing the data for the selected students. The data is merged with the label format and displayed on your screen. This process could take a little while, depending on how many students you selected. Be patient.
10. Load your label forms paper into the printer tray you specified earlier.
11. From the Word menu, select **File > Print** (or press **Ctrl+P**) to print your labels.
12. Click **File > Exit** to close Microsoft Word and return to CampusNexus Student. Word asks a couple of questions about saving changes to the forms. You will normally click **No**to these questions.
13. When you return to CampusNexus Student, it will ask if you want to clear the student count for your label form. As with other letters or activities, you would normally say **Yes**. If you think you may have to reprint the labels for any reason, say **No**.

If you find that your labels need a little adjusting, go back to the beginning of Part 2. When you click **Edit Letter**, the program finds your label "letter" and starts Word with the formatted label document. You can edit the document just like you would any other letter. See your Microsoft Word manual for more details on editing mail merge documents.

Automatic Activity Scheduler

You can set up an automatic procedure to assign your new label "activity" to students based on some triggering condition. In our new lead example, you could cause the label to be printed for each new lead that enters the system. See the topics on Activity Scheduler for more information on this procedure.

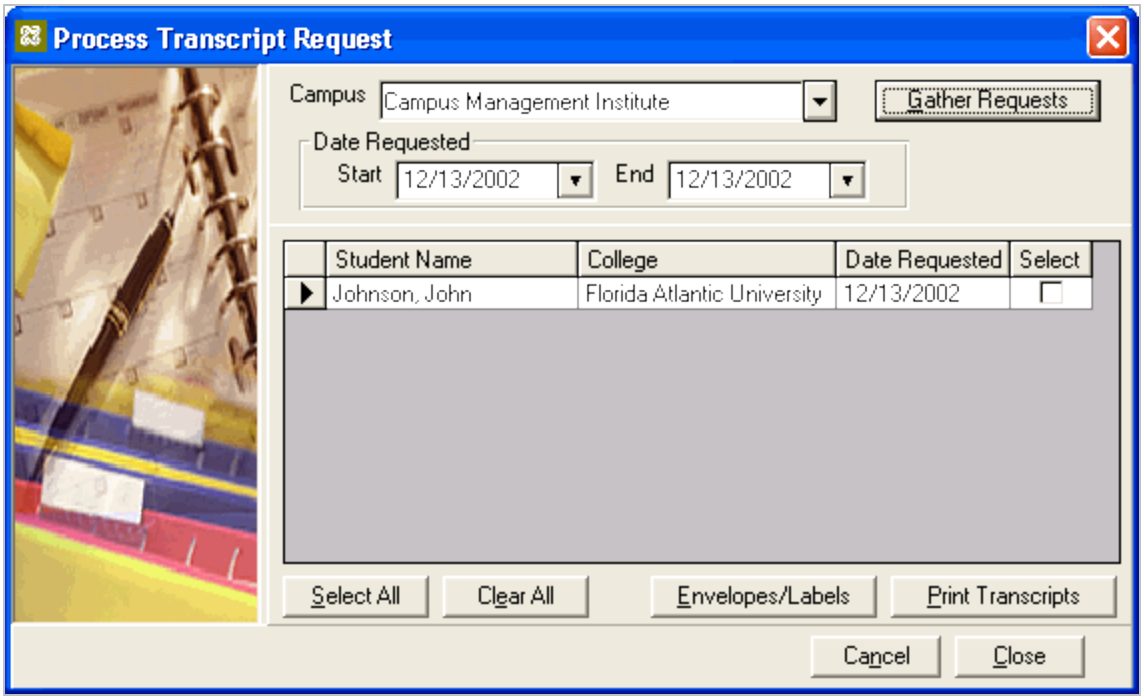
Processing Transcript Requests

You can use this form to process transcript requests that were entered under View > Contact Manager > Transcript Requests.

Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

To process transcript requests:

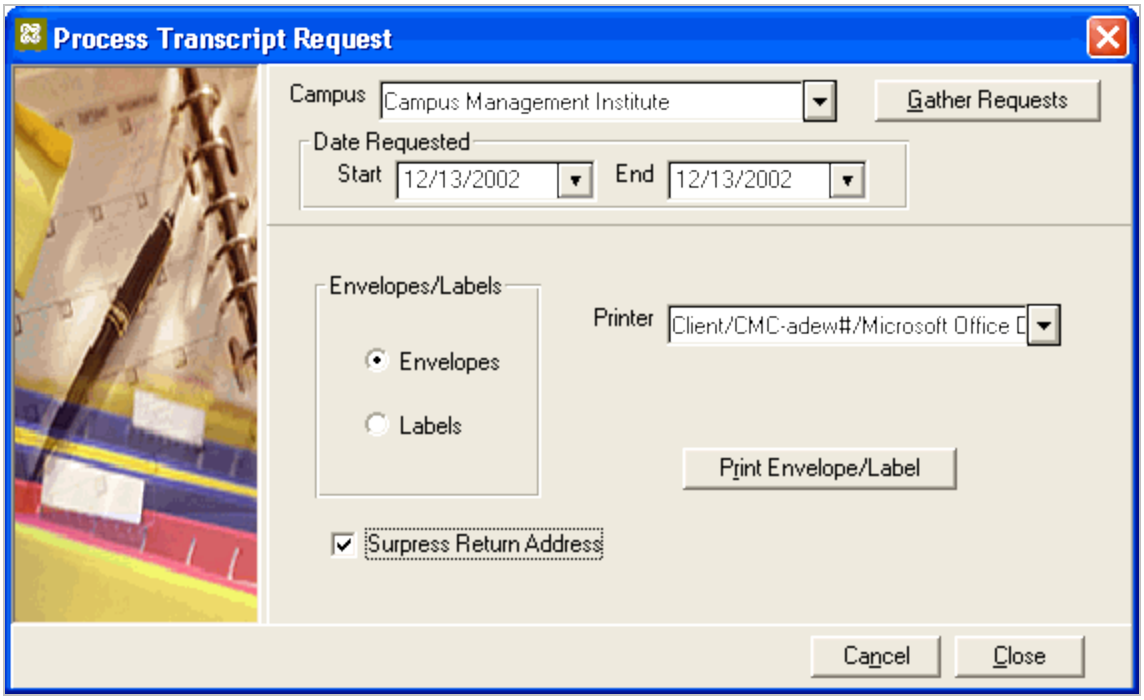
1. Navigate to **Daily > Contact Manager>Process Transcript Requests**. The Process Transcript Request form is displayed.



2. Select the **Campus** from which the transcripts will be issued.
3. Enter a date range from which to select the **Date(s) Requested**.
4. Click **Gather Requests**. CampusNexus Student looks for any transcript requests that match your campus and date range and display them in the grid. CampusNexus Student gathers all records where:
    - The campus in the Transcript Request table matches your selected campus
    - The Date Sent field is empty
    - The Date Requested is in your defined range, and
    - The students are not members of a group where transcript printing is on hold.
5. Review the list of transcript requests. You can click **Select All** to select all the listed requests for transcript printing. Click **Clear All** to clear the Select check box on all listed requests.
6. Click **Print Transcripts** to print transcripts for the selected requests. The Print Transcripts procedure also updates the date sent in the Transcript Request table with the system date. If you have created a custom transcript and you have entered the file name under Setup > Academic Records, the program uses your report instead of the generic

report.

7. Click **Envelope/Label**. CampusNexus Student displays a form from which you can print envelopes and/or labels. The labels are printed on the default label printer. You can select the envelope printer from a drop-down list of printers available to you.



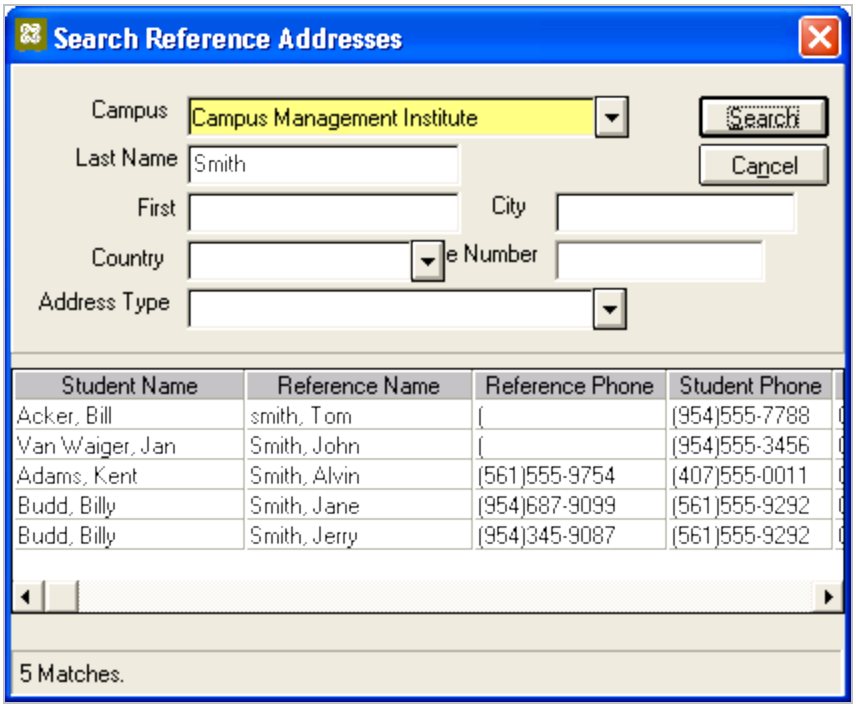
- Select **Envelopes** or **Labels**.
- Select or clear **Suppress Return Address** to stop the printing of the return address when using preprinted envelopes or labels.
- Click **Print Envelope/Label** to print the selected documents.

Searching for Reference Addresses

With this feature, you can search through all student addresses. The difference between this feature and View > Contact Manager > Addresses is that this option searches through all student addresses in the database (not just addresses with an Address Type of Reference). The View option displays the addresses for a selected student.

To search for an address in the student address records:

1. Navigate to **Daily > Contact Manager > Search Reference Address** or click the address search icon in the Contact Manager toolbar. The Search Reference Addresses form is displayed.



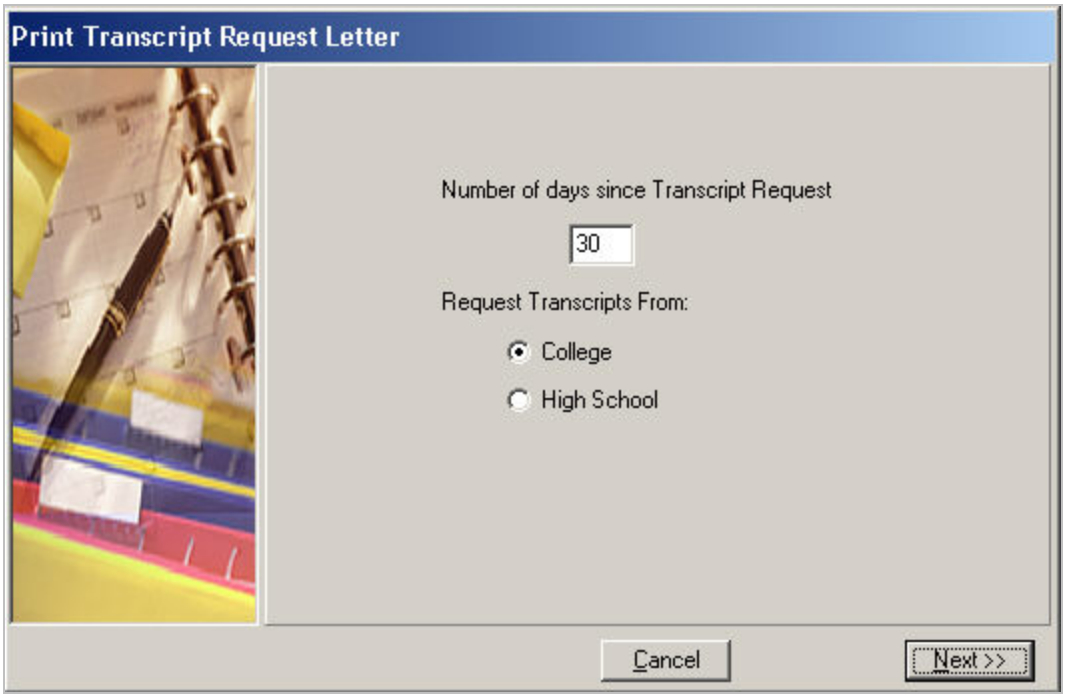
2. Select the **Campus** from which to search for the address(es).
3. Enter the search criteria. You can enter combinations of **Last Name**, **First Name**, **Phone**, and **City**.
4. Select an **Address Type** from the drop-down list to limit the search to a particular type of address.
5. Click **Search**. The program will find all the student addresses that meet your search criteria and display them in the grid..
6. Double click a listed reference to display the student master of the student to whom the address is related. From there, you can select **View > Contact Manager > Addresses** to see the details of the selected reference address.
7. Click **Cancel** to close the search form.

Printing Transcript Request Letters

You may print transcript request letters by following the instructions below. See also Process Transcript Requests.

To print transcript request letters:

1. Navigate to **Daily > Contact Manager > Transcript Request Letters**. The Print Transcript Request Letters wizard is displayed.



2. Accept the default for the number of days since the last request or enter your choice, select **College** or **High School** and click **Next** to continue.
3. The wizard displays a list of transcript requests sorted by school. Enable the **Select** box for the schools to receive letters, and click **Next** to continue.
4. When the wizard displays the option to continue and clear the list, or return to the letter selection, click **Continue** to complete the print operation, otherwise click **Return**.

Importing and Exporting SEVIS Data

To Export SEVIS data:

1. Navigate to **Daily > Contact Manager > SEVIS Transmission**. The SEVIS Transmission form is displayed.
2. Select the **Create/Regenerate Extract File** tab.
3. Select the **File Type** and click the **Gather Students** button. The system lists all students in the Ready to Send or Accepted category.

   You can select specific students from the list and remove them by clicking the **Remove Student** button. When you click **Create File**, the students in the list are written to an XML file for transmission to SEVIS.
4. Select the **SEVIS Transmission and Data Import** tab to view the batch(es) that are ready to transmit to SEVIS.
5. Click **Browse** and find the listed batch ID file.
6. Click **Export** to send the file.

To Import SEVIS data:

1. Navigate to **Daily > Contact Manager > SEVIS Transmission**. The SEVIS Transmission form is displayed.
2. Select the **SEVIS Transmission and Data Import** tab.
3. Select the file to import and click **Import** the student's transmission history is updated. The import also launches an unzip program for zipped files.

Reviewing PDSO SEVIS Data

The Principal Designated School Official (PDSO) is a member of the school administration whose compensation does not come from commissions for recruitment of foreign students. The PDSO is responsible for updating SEVIS to reflect the addition or deletion of all designated officials (DSO) on his or her associated campus. The PDSO also serves as the point of contact on any issues that relate to the school's compliance with customs regulations as well as any system alerts generated by SEVIS.

The PDSO SEVIS Review feature allows the PDSO to review SEVIS data to verify compliance with SEVIS regulations.

To review SEVIS data:

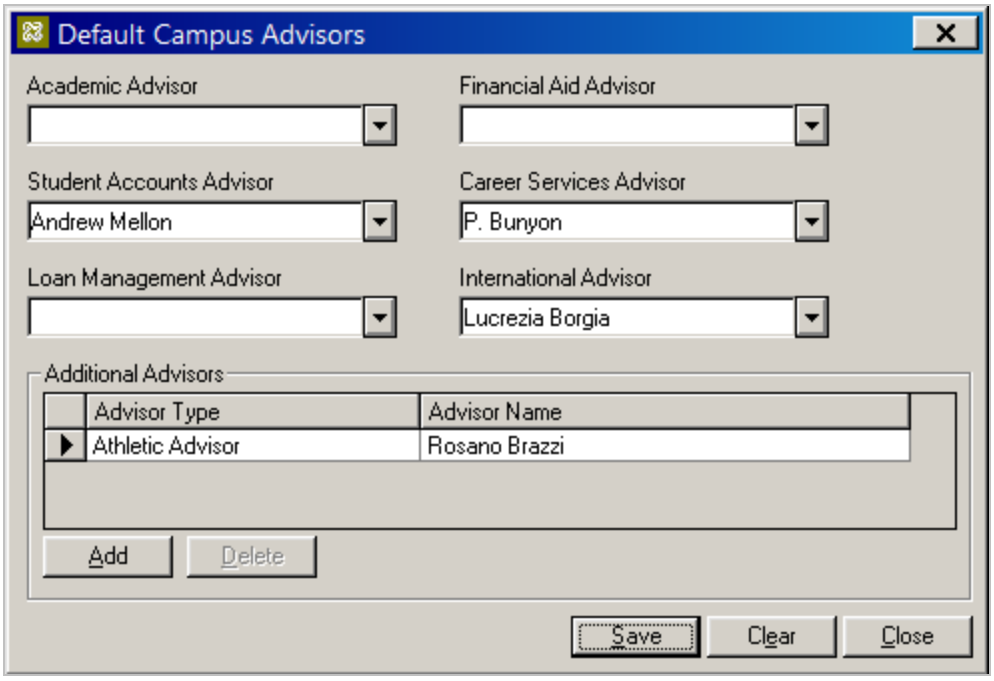
1. Navigate to **Daily > Contact Manager > PDSO SEVIS Review**. The PDSO SEVIS Review form is displayed.
2. Click **Detail** to view further details on the selected student record.
3. Use the **Accept** or **Reject** check boxes to include or exclude specific student records.
4. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Designating Default Campus Advisors

Using the Default Campus Advisors form, you can designate a staff member to be the default advisor in each department of the school. When a student is enrolled, the default advisors will be listed on the advisors form. You can change the advisors during the enrollment process if necessary, and if you have the appropriate authority. The advisor drop-down lists are filtered by the student's enrollment campus.

To select default campus advisors for each department:

1. Navigate to **Daily > Contact Manager > Default Campus Advisors**. The Default Campus Advisors form is displayed.



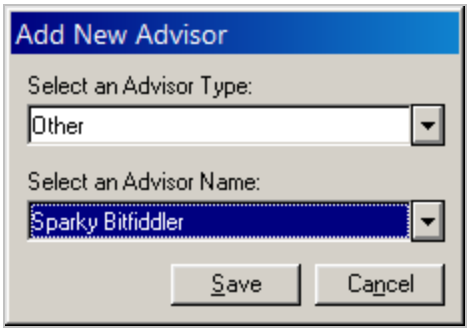
2. Select a staff member on each list.
3. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Additional Advisors

The additional advisors come from groups having the Other Advisors Type Code (OTH) related to them. You can have as many additional advisor groups as you like.

To add an advisor:

1. Navigate to **Daily > Contact Manager > Default Campus Advisors**. The Default Campus Advisors form is displayed.
2. In the Additional Advisors frame, click **Add**. The Add New Advisor form is displayed.



3. Select an **Advisor Type**.
4. Select an **Advisor Name**.
5. Click **Save**. You are returned to the Default Campus Advisors form.

To delete an advisor:

1. Navigate to **Daily > Contact Manager > Default Campus Advisors**. The Default Campus Advisors form is displayed.
2. In the Additional Advisors frame, select the advisor row to be deleted.
3. Click **Delete**. The advisor is removed from the grid.

The Advisor Type Codes used in CampusNexus Student are as follows:

- AD
- AM
- FA
- LM
- NI
- OTH
- PL
- SA

Advisor Assignment

Use Advisor Assignment to assign or reassign a group of students to a new advisor. This is useful for allocating a large group of new students across multiple advisors, or to simply reallocate students assigned to an advisor who has left the campus to new advisors. The Contact Manager activities for the original advisor are set to a status of re-assigned, and activities are recreated for the new advisor.

Reassigning Activities

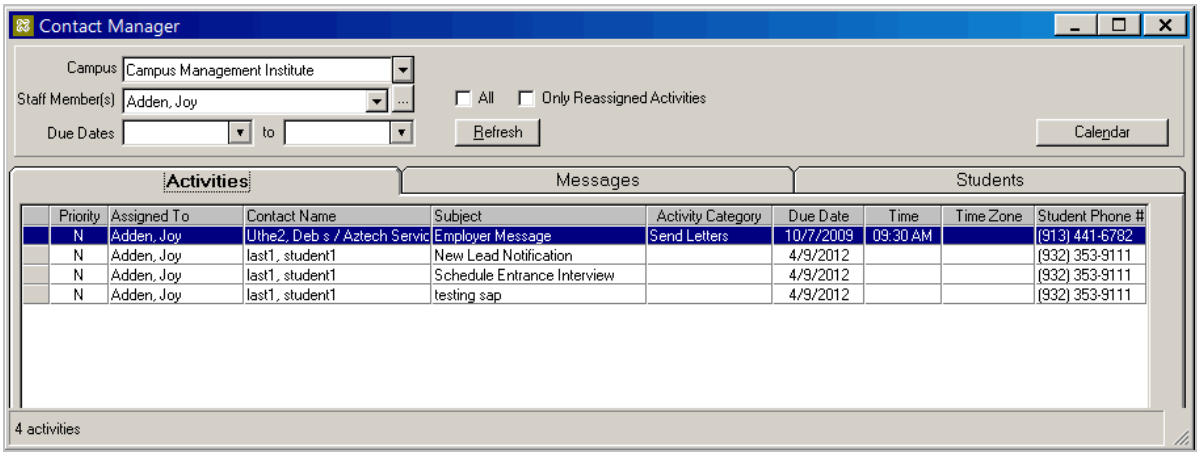
When activities are reassigned from one staff member to another, the new staff member will receive a notification indicating that new activities have been reassigned the next time the staff member logs onto CampusNexus Student.

The notification message, 'Activities have been reassigned to you. Would you like to view them now?' will display only once. Likewise, when activities are reassigned to multiple staff members, the notification message is displayed once to all members with the reassigned activities when they login to the system. This is also true for multiple activities being reassigned to the same staff member, only one notification message will be sent.

If the staff member is logged on to the system and activities are assigned to them and they see the activities without logging off, then the notification message will not display the next time they log on to CampusNexus Student. Finally, if there are no activities reassigned to the staff member, the notification message will not display for them.

When the notification message is presented, the staff member can view the newly assigned activities. If the member decides not to view the reassigned activities and clicks 'No' on the notification message, Contact Manager will display all the activities listed.

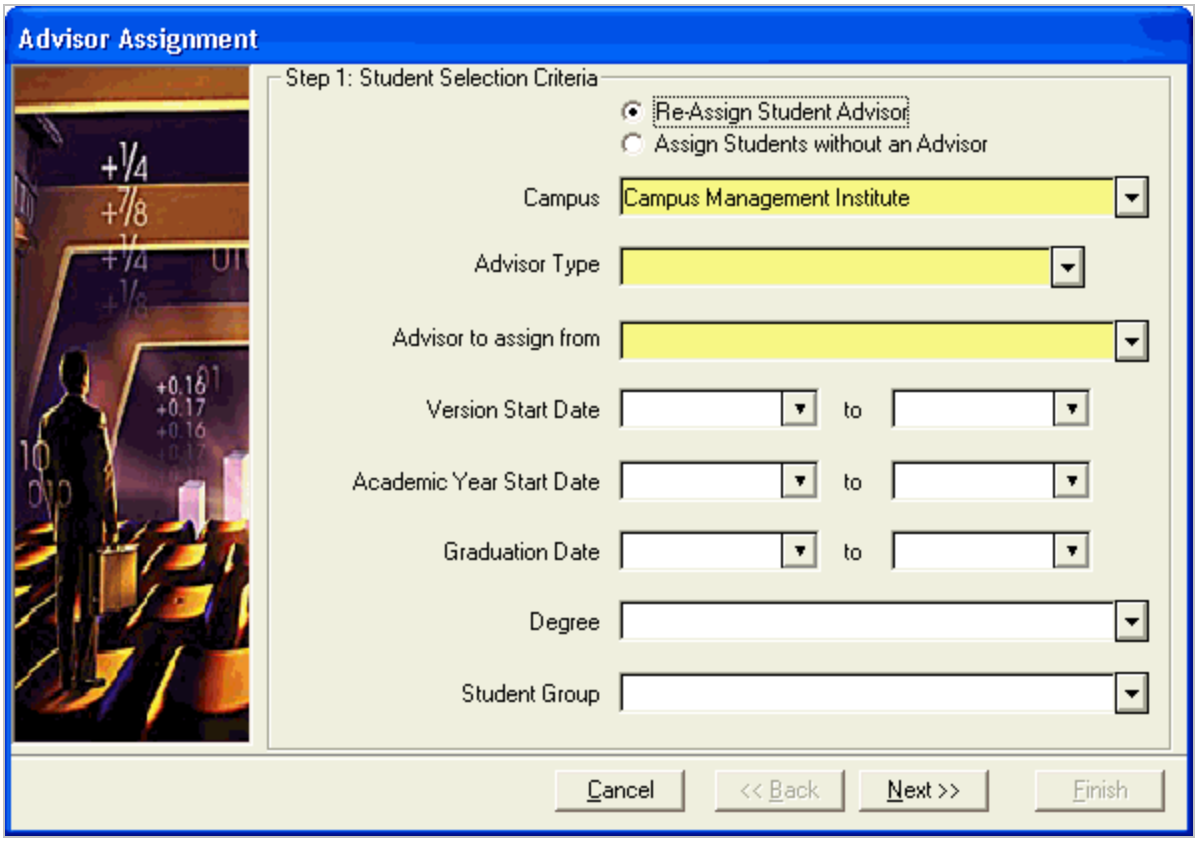
Note: By default, the Only Reassigned Activities check box is cleared. When selected, the check box is displayed only when the staff member selects the Activities tab. On the Activities tab, a new column 'Reassigned Date' has been added.



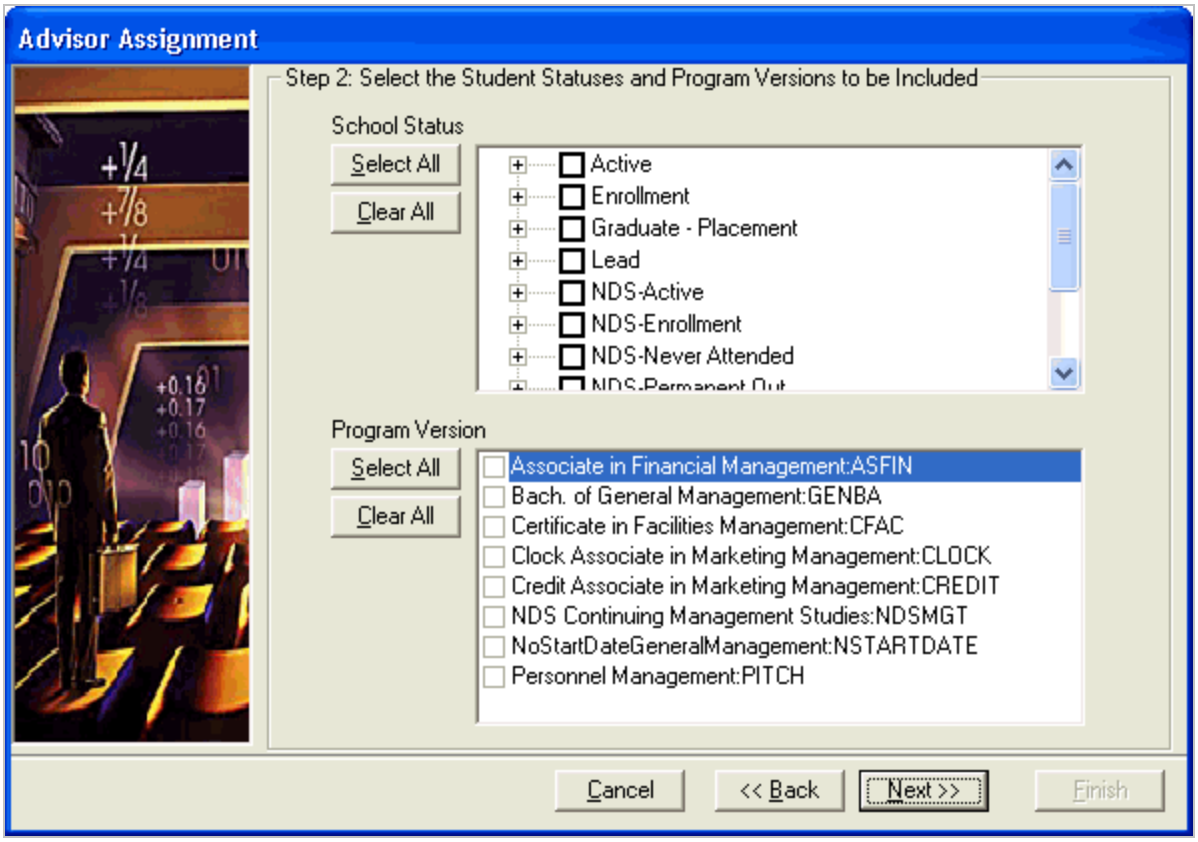
The system tracks all advisor changes to the Admissions audit folder for review. A printable report is available as part of the assignment process.

To assign advisors:

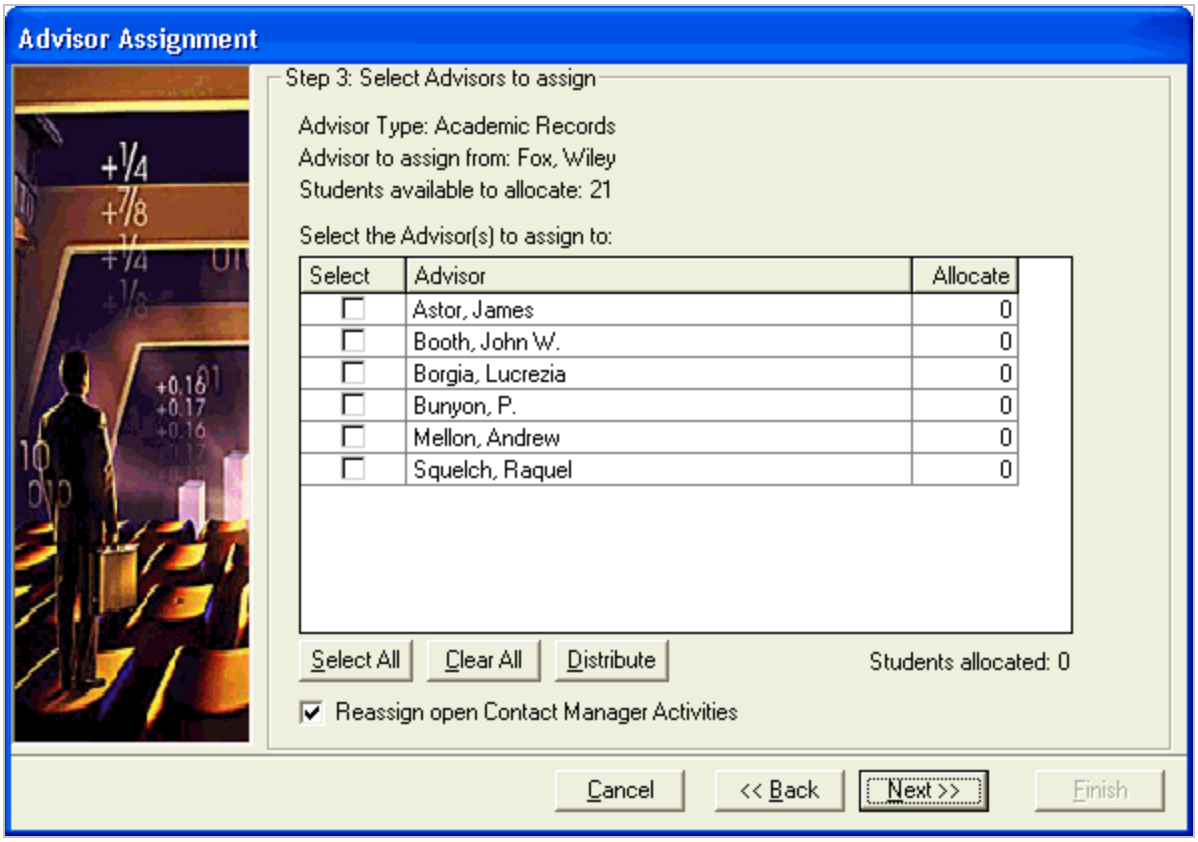
1. Navigate to **Daily > Contact Manager > Advisor Assignment**. Step 1 of the 5-step Advisor Assignment form is displayed. Enter the data on the five forms as required.



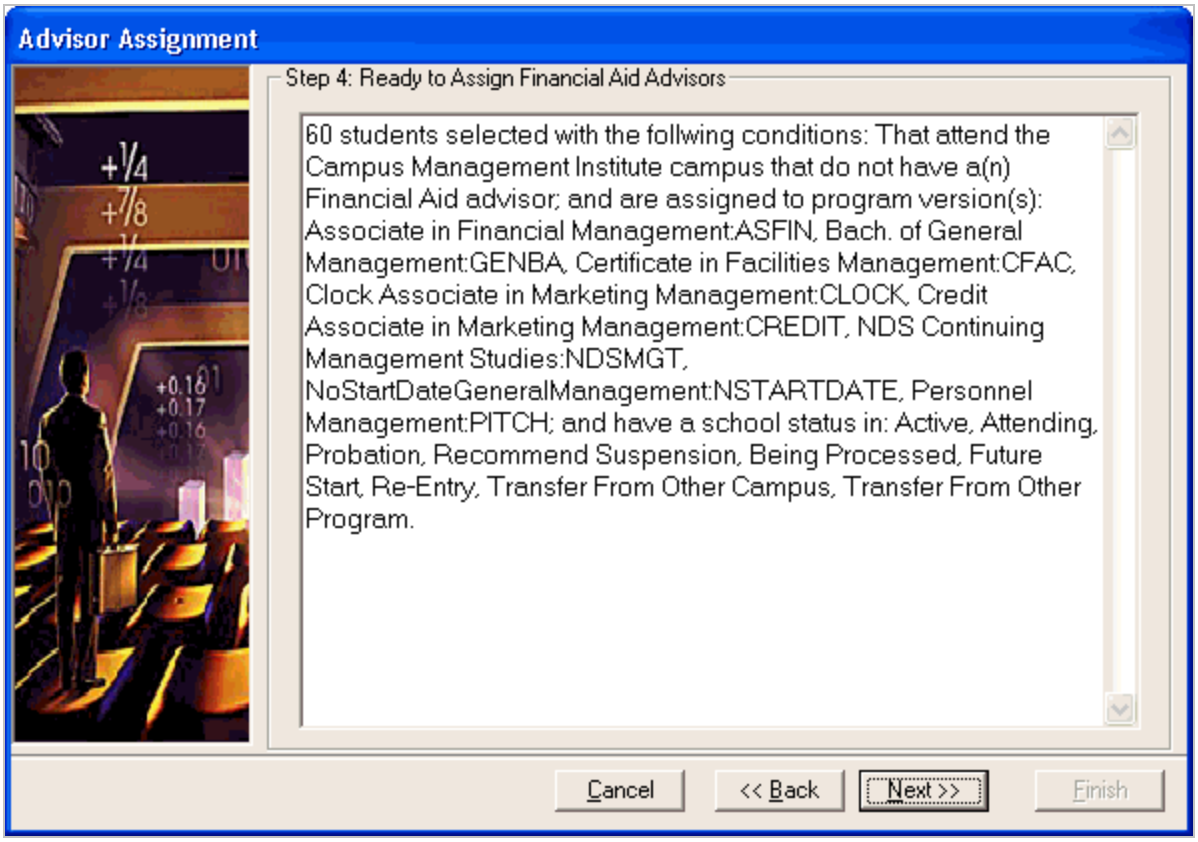
2. Click **Next** to proceed. In Step 2 filter the selected students by statuses and program versions. Click the check boxes to enable a criterion as a filter.



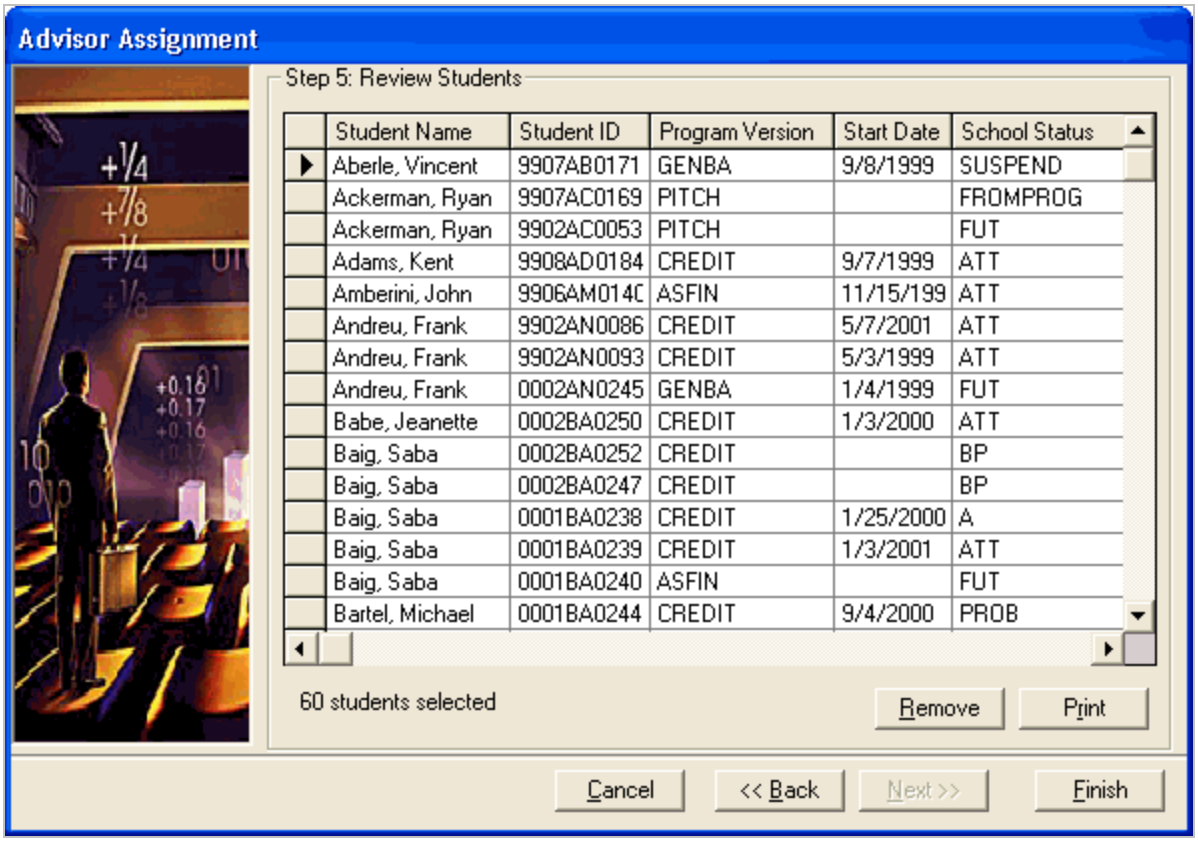
3. Click **Next** to proceed. In Step 3, choose how many students to allocate to each advisor. In the example below, there are 21 students. You could assign five students to each of the first four advisors, or assign all 21 to another advisor, or any other valid combination.



4. Click **Next** to proceed. Step 4 provides a summary of the changes that were made based on the condition chosen in steps 2 and 3. This is a good time to check that the criteria match your requirements. If they do not match what you intended, click **Back** to reset the options as needed.



5. Click **Next** to proceed. Step 5 provides a list of all the students being affected by this reassignment. If students are listed in this group that you do not want to reassign, select them and click **Remove** to remove the selected student from this list. The students' advisor assignment will not be changed.



6. Click **Finish** to complete the assignment process.

Field Descriptions for Advisor Assignment Form - Step 1: Student Selection Criteria

Field	Description
Re-Assign Student Advisor	Enable this option to change the advisors assigned to students.
Assign Students without an Advisor	Enable this option to assign advisors to students who have not yet had advisors assigned.
Campus	Select the campus for which this assignment applies.
Advisor Type	Select the type of advisors from the drop-down list.
Advisor to assign from	If you are assigning new students or student who have no assigned advisors, this field is not displayed. If your are reassigning a student advisor, this field selection is required. Select the individual advisor that is the original advisor whose students are being reassigned.
Version Start Date	Select a date range to filter the list of students by version start. Leaving this field blank excludes no students on the basis of their Version Start Date.
Academic Year Start Date	Select a date range to filter the list of students by Academic Year Start Date. Leaving this field blank excludes no students on the basis of their Academic Year Start Date.

Field	Description
Graduation Date	Select a date range to filter the list of students by Graduation Date. Leaving this field blank excludes no students on the basis of their Graduation Date.
Degree	Select a degree to filter the list of students by the selected Degree. Leaving this field blank excludes no students on the basis of their Degree.
Student Group	Select a student group to filter the list of students by the selected group. Leaving this field blank excludes no students on the basis of their group membership.

Looking Up DNC Numbers

Validate phone numbers by using the CampusNexus Student DNC database. This is helpful for referrals of new students from existing students. Referrals will not exist in the database; however, you can use the National Do Not Call Lookup form to see if a referral's phone number is on the National Do Not Call list.

To look up a referral's phone number:

1. Navigate to **Daily > Contact Manager > National Do Not Call Lookup**. The lookup form is displayed.

2. Type a phone number in the phone number field, and click **Search DNC**. Several results are possible:
    - Phone number does NOT exist in the CampusNexus Student DNC database. The user is advised that the number does not exist in the database. It is permissible to phone this person.
    - Phone number exists in the CampusNexus Student DNC database, but no associated student phone number was matched in CampusNexus Student. The user is advised that the phone number is on the DNC list, but that no associated student data is available. It is not permissible to phone this person using the phone number that appears on the DNC list.
    - Phone number exists in the CampusNexus StudentCampusNexus Student DNC database, and an associated student phone number was matched in CampusNexus Student. Then, one of two options occur:
        - If the student is a new lead and the new lead date is older than the 90-day FTC rule, it is not permissible to phone this person (the user is so warned).
        - If the student is enrolled, active, or on leave of absence (not a new lead), the user is so advised: it is permissible to phone this person.

    Other rules also apply to govern whether it is permissible to phone a student.

If the student has enrolled since the Lead Date, then that student qualifies as someone who is doing business with the school, the 18-month rule applies, and it is permissible to phone the student (even if that student is listed on the DNC list) for up to 18 months after the last voice contact with the student.

If the student has given permission to the school to be called, the student may be called (even if that student is listed on the DNC list).

If the student has not yet enrolled, and no voice contact has been made with the student in the past 90 days (check the Contact History in Contact Manager for that student), then it is not permissible to phone that student. This does not preclude contacting the student by other means (letter, email, house call, etc).

If the student has requested not to be called, then it is not permissible to phone that student.

Agency/Third Party

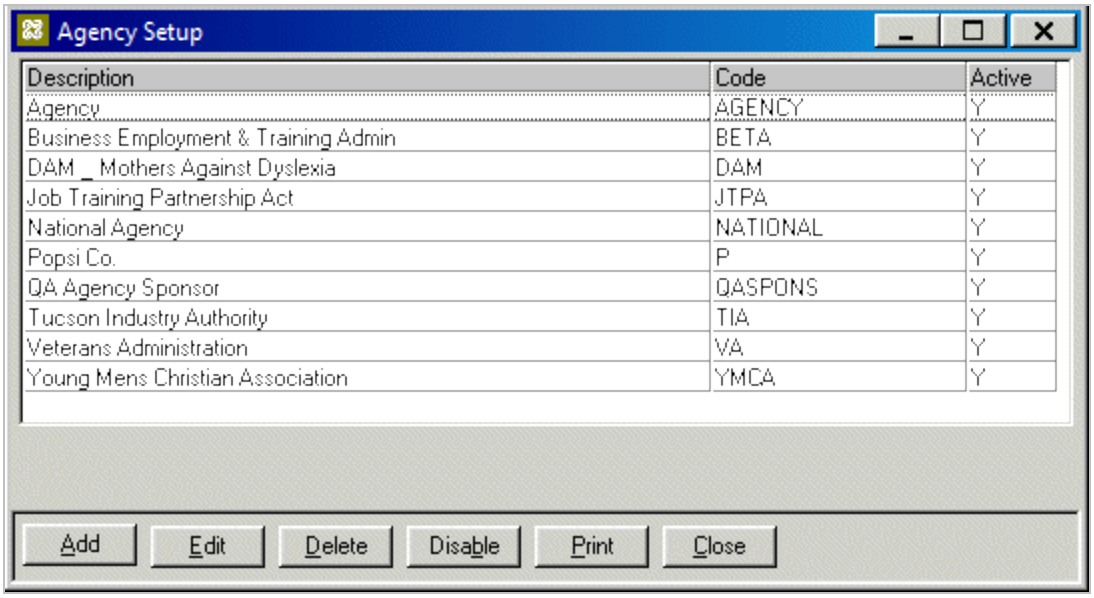
Agency sponsors or third party billing entities are organizations that provide assistance to students. A student may have some special qualification that makes him or her eligible for the sponsor's assistance. Students can be referred to your institution, or you may have special arrangements with agency sponsors to fund qualifying students. An agency or third party can be selected in the lead (student) record.

An agency may have one or more branches with which you school does business. You can set up Agencies and Agency Branches using the Agency Setup form and the Agency Branch Setup form.

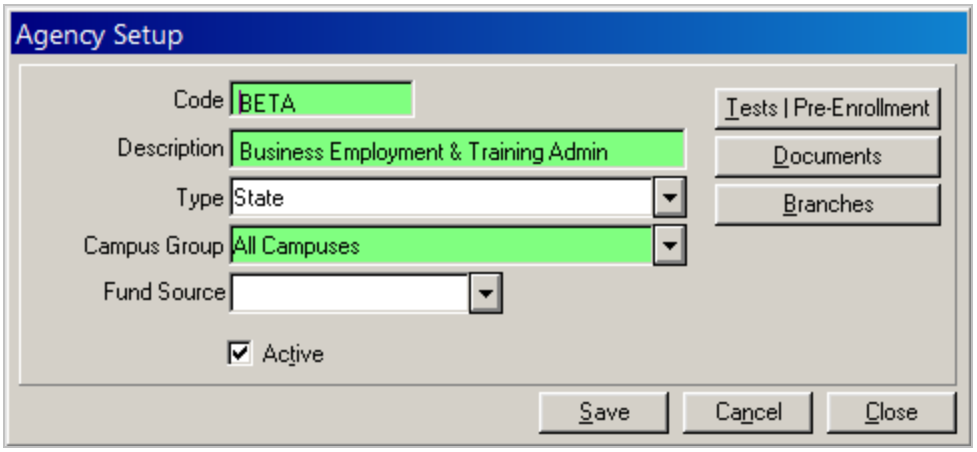
- Use the **Agency Setup** form for the following tasks:
  - Selecting one or more Entrance Tests that are required for enrollment by an agency.
  - Selecting one or more Documents required by an agency. The tracking facilities of CampusNexus Student track the required agency-third party documents.
  - Associating an agency with one or more Branches.
- Use the **Agency Branch Setup** form for the following tasks
  - Viewing, adding, or editing agency branch Contacts.
  - Setting up Payment Information.
  - Associating a list of affiliated Students with the Agency Branch.

To add or edit an Agency sponsor:

1. Navigate to **Daily > Contact Manager > Agency/Third Party**. The Agency Setup grid is displayed with a list of previously set up agencies.



2. Click **Add** to add a new agency sponsor, or select an agency and click **Edit**. The Agency Setup form is displayed.

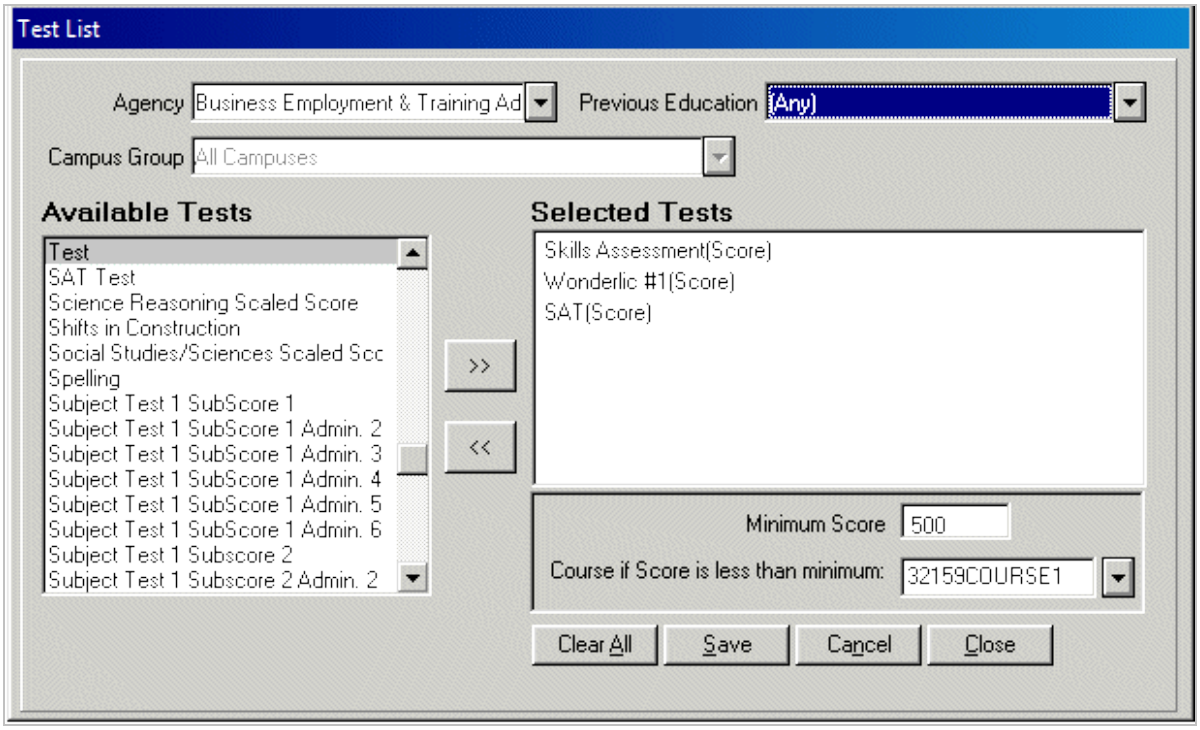


3. Specify a unique **Code**.
4. Enter a **Description**.
5. Select an Agency Type.
6. Select a **Campus Group** that will use the agency record.
7. Select a **Fund Source**. Fund Source is used to connect the agency to a fund source. This field is used to filter agencies when printing invoices.
8. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
9. Click **Save**.

Tests | Pre-Enrollment

To select entrance tests for the agency:

1. Open the Agency Setup form as described above.
2. Click **Tests | Pre-Enrollment**. The Test List form is displayed.



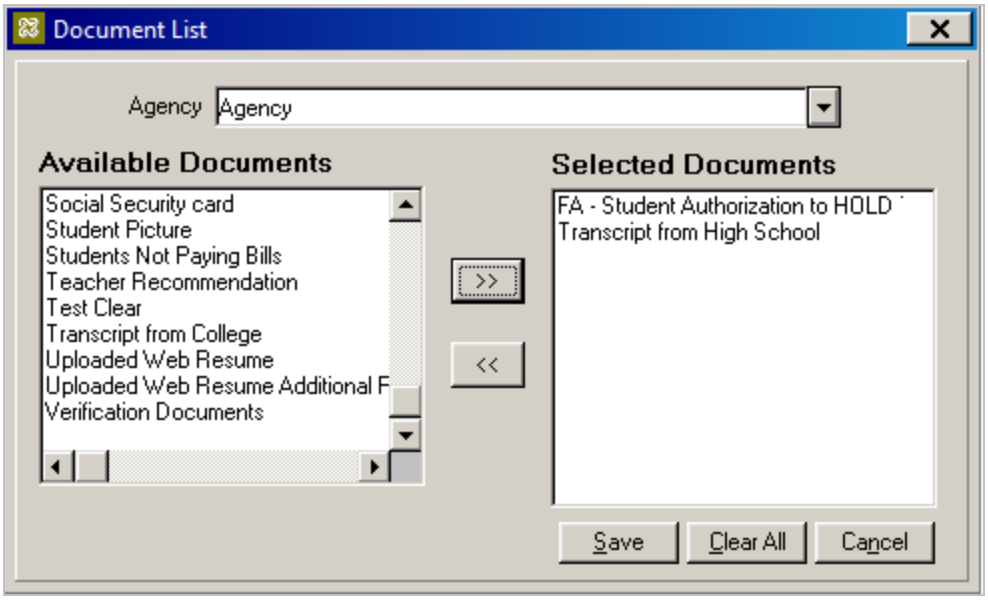
3. Check that the correct **Agency** is displayed in the Agency list box at the top of the form.
4. Select a **Previous Education** option.
5. Select the **Campus Group** if this field is enabled.

   If this form was activated from the **Agency/Third Party** form, the campus group field is disabled because a campus group has already been selected for the agency being edited on the Agency Setup form. The value for the campus group on this form defaults to the one specified on the Agency Setup form.

6. Select a test from the list of **Available Tests** and click to move it to the Selected Tests box.
7. Enter a numeric value for the acceptable **Minimum Score** for the test. The data type of the test selected must be *Score*, otherwise the field is disabled.
8. In the **Course if Score is less than minimum** field, select a course to be assigned to any student who fails to reach the minimum score on the selected test. The course will be added if the course is not already included in the student's course schedule, when the student's score is below the minimum value. The data type of the test must be *Score*, otherwise the field is disabled.
9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Documents

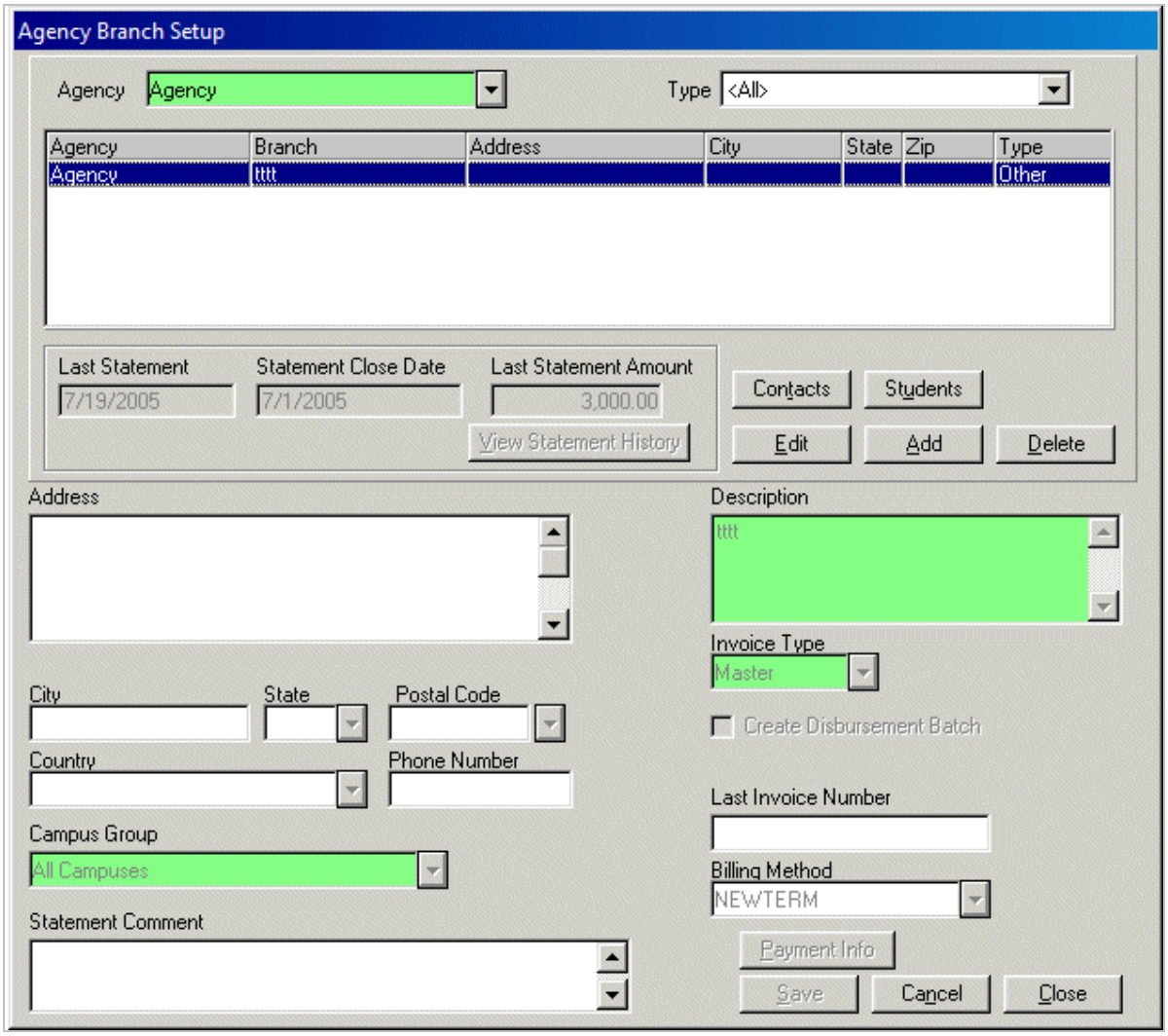
1. Open the Agency Setup form as described above.
2. Click **Documents**. The Document List form is displayed.



3. Check that the correct **Agency** is displayed in the Agency list box at the top of the form.
4. Select a document from the list of **Available Documents** and click to move it to the Selected Documents box.
5. Click **Save**. The Document List form closes.

Branches

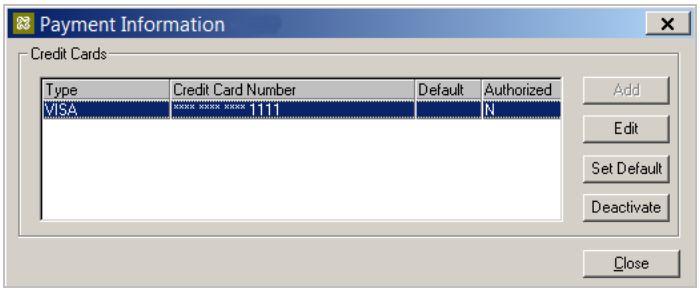
1. Open the Agency Setup form as described above.
2. Click **Branches**. The Agency Branch Setup form is displayed.



3. Check that the correct **Agency** is displayed in the Agency list box at the top of the form.
4. Select an Agency Type to filter the number of agencies displayed.
5. Click **Add** to add a new branch of the agency, or select a branch and click **Edit**.
6. Enter the necessary **Contact** and **Address** data.
7. Enter a **Description**.
8. Select an **Invoice Type** of *Individual* or *Master*. A Master Invoice indicates billing for all students associated with an agency on one invoice (similar to printing a master check).
9. If the agency branch is associated with a group of students and batch disbursements needed, select **Create Disbursement Batch**.
10. If applicable, enter the **Last Invoice Number**.
11. Select the **Billing Method** to be used as the default for any enrollment created from a student with this agency affiliation.
12. Select the **Campus Group** that will use this agency branch.

13. Enter text in the **Statement Comment** box. The text included here is displayed on statements printed for this agency branch.

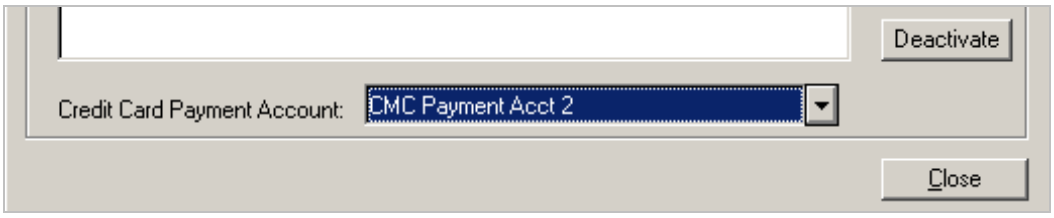
14. If applicable, click **Payment Information**. The Payment Information form is displayed.



The **Authorized** column indicates if a card has been authorized by a credit card processor.

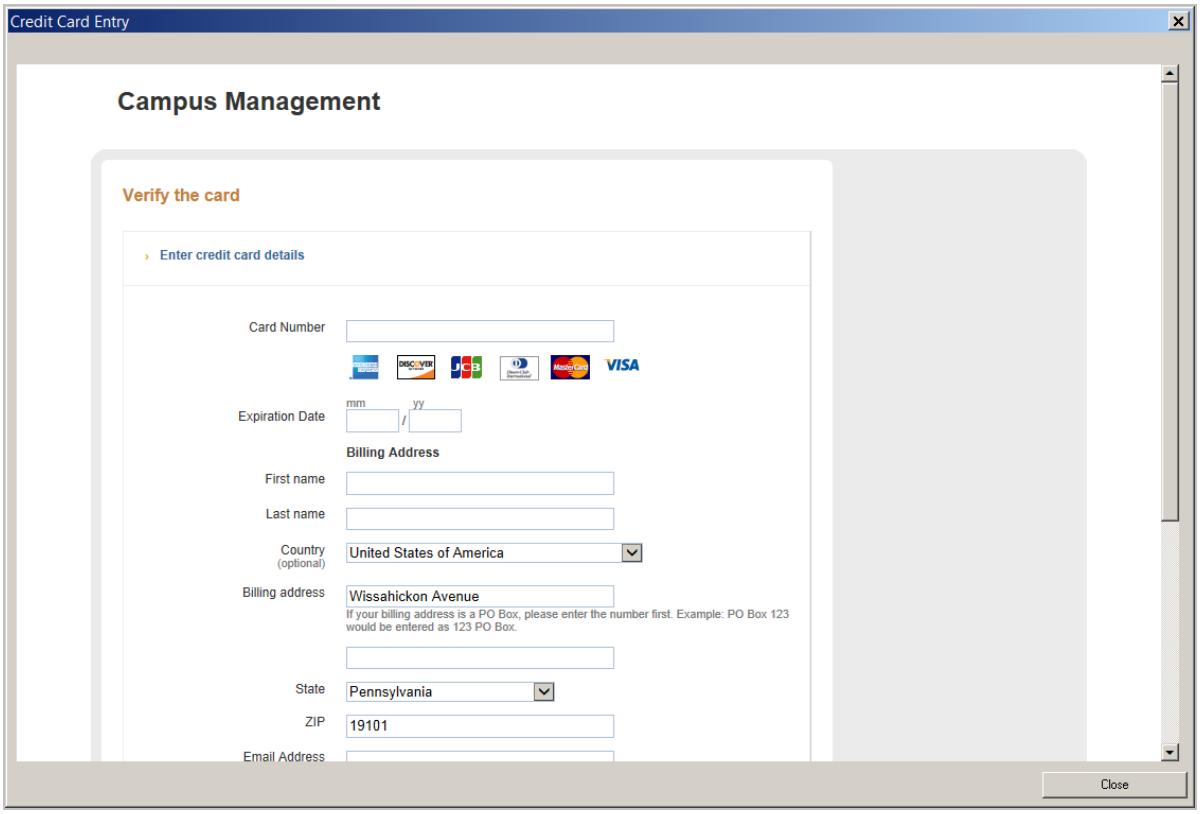
15. On the Payment Information form, click **Add** or select a record and click **Edit**.

Note: If campuses within the campus group associated with the agency branch are configured to Verify Credit Card Payments Posted Using CampusNexus Student (Campus Information - Electronic Processing Tab) and all the campuses use the same payment account, when **Add** is clicked, the user is redirected to the payment gateway provider's hosted page to add the credit card. If the campuses of the campus group are using different payment accounts, you need to indicate which payment account to use to authorize the new credit card in the **Credit Card Payment Account** drop-down field before you can add a credit card.

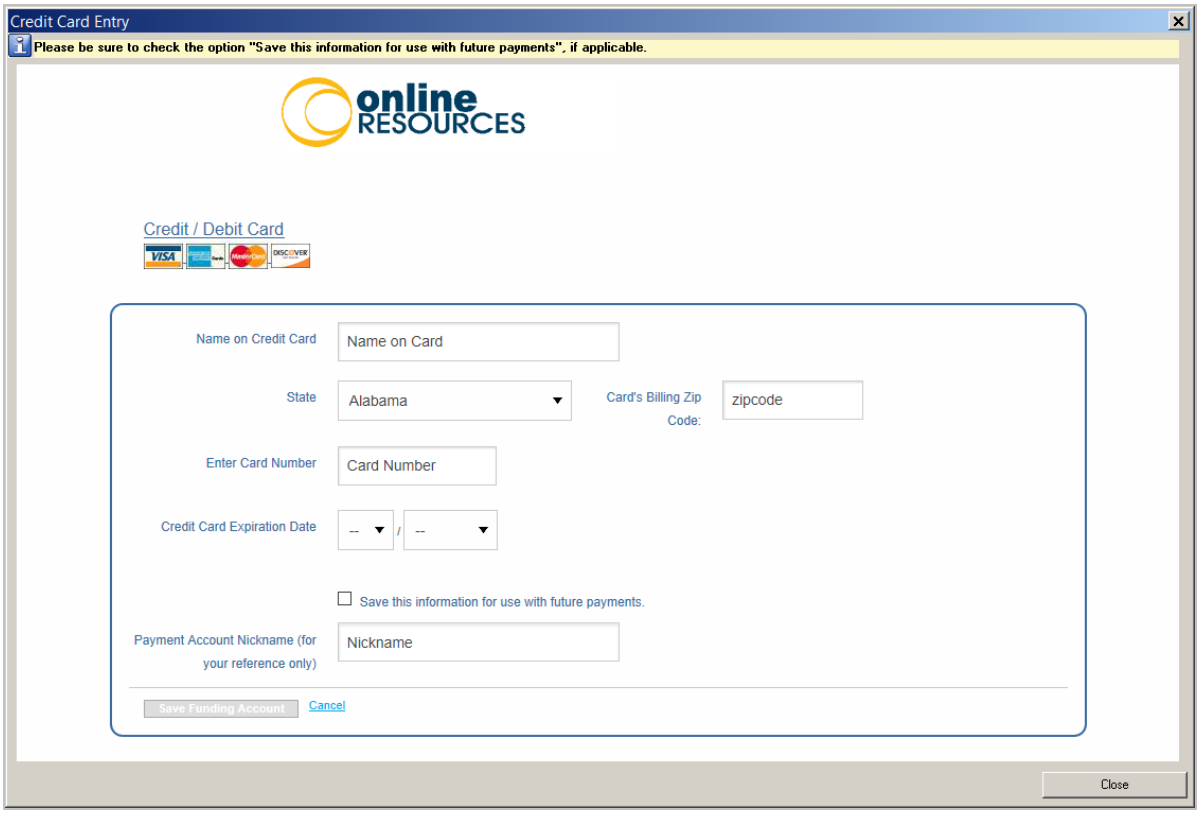


Edit is disabled . When **Add** is clicked, the user is redirected to the payment gateway provider's hosted page to add the credit card.

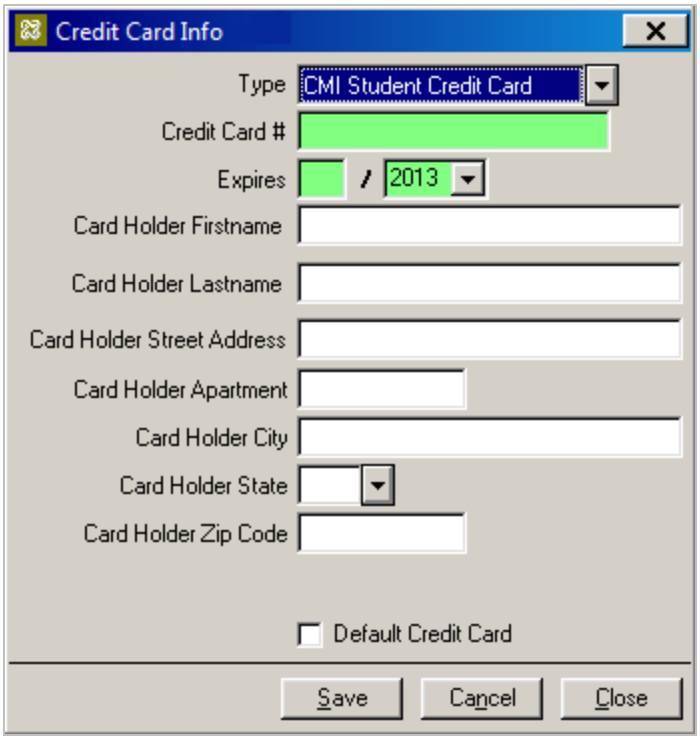
PayPal


Credit Card Entry
Campus Management
Verify the card
Enter credit card details
Card Number
Expiration Date
mm
yy
Billing Address
First name
Last name
Country (optional)
United States of America
Billing address
Wissahickon Avenue
If your billing address is a PO Box, please enter the number first. Example: PO Box 123 would be entered as 123 PO Box.
State
Pennsylvania
ZIP
19101
Email Address
Close

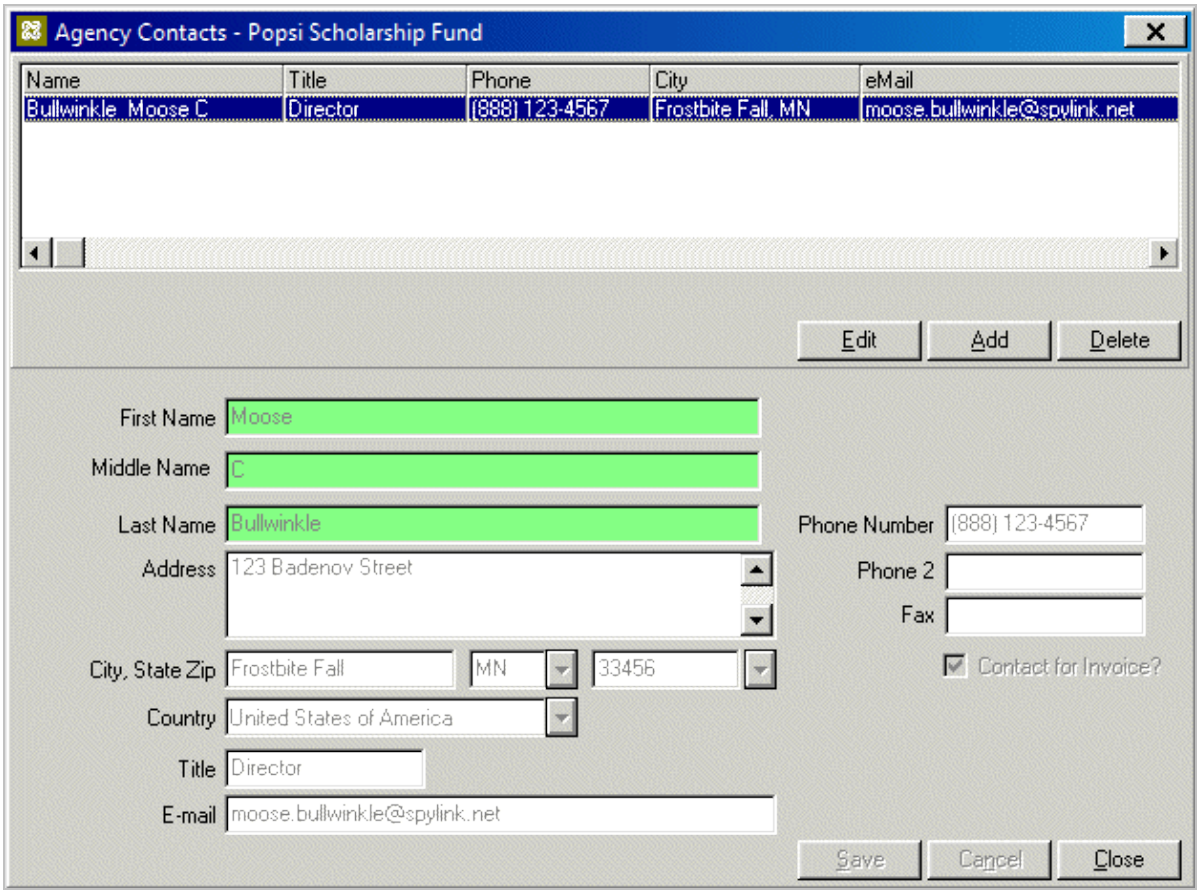
ACI


Credit Card Entry
Please be sure to check the option "Save this information for use with future payments", if applicable.
online RESOURCES
Credit / Debit Card
Name on Credit Card
Name on Card
State
Alabama
Card's Billing Zip Code:
zipcode
Enter Card Number
Card Number
Credit Card Expiration Date
Save this information for use with future payments.
Payment Account Nickname (for your reference only)
Nickname
Save Funding Account
Cancel
Close

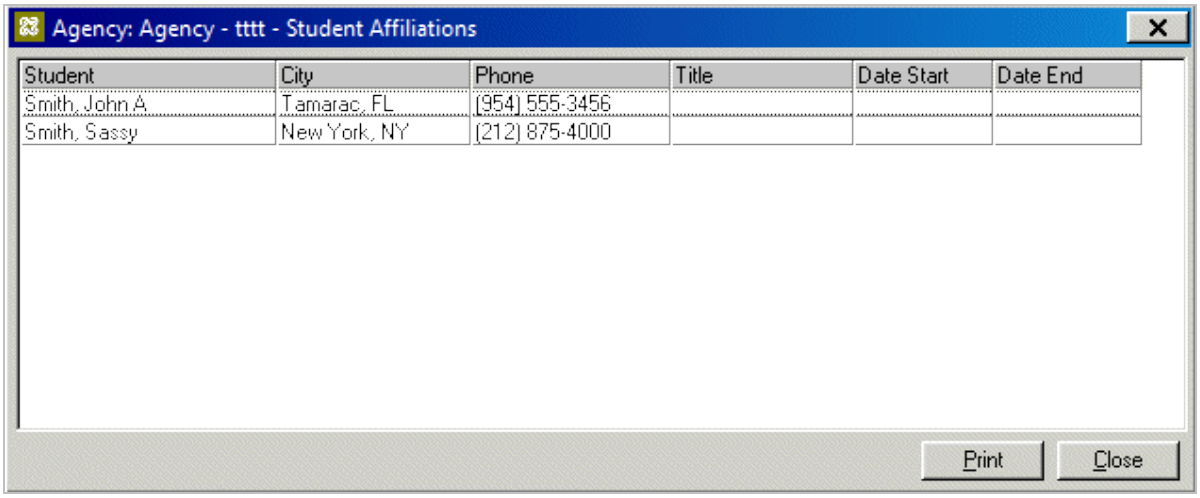
16. When you add or edit payment information for credit card payments, the following form is displayed. Agency payments may only be processed using a credit card. Enter the appropriate information.



17. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.
18. **Close** the Payment Information form to return to the Agency Branch Setup form
19. On the Agency Branch Setup form, click **Contacts**. The Agency Contacts form is displayed.



20. Click **Add**, or select a record and click **Edit**, and enter the appropriate information.
21. Select the **Contact for Invoice** check box if you want the contact name and address to be used on the agency invoice.
22. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. You are returned to the Agency Branch Setup form.
23. On the Agency Branch Setup form, click **Students** to see a list of students affiliated with the selected Agency Branch.



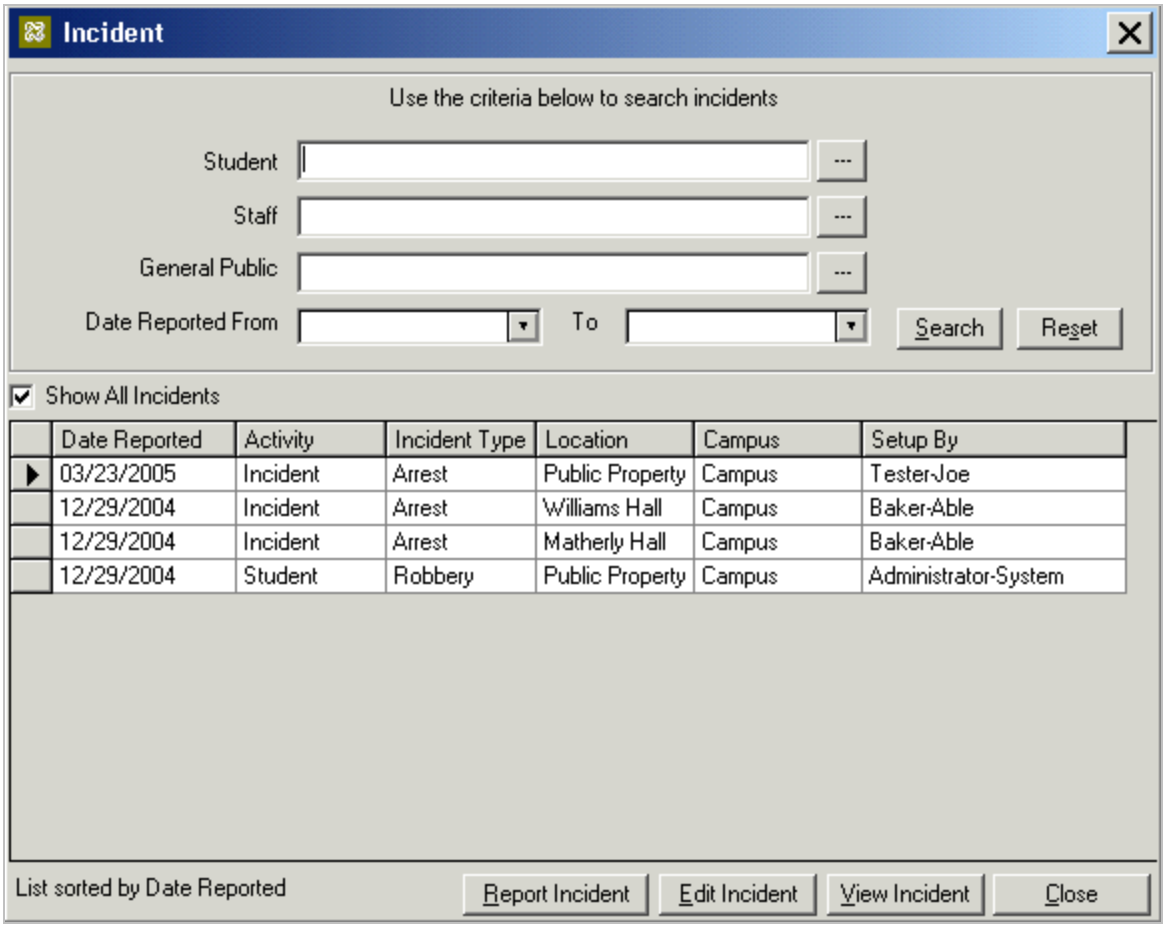
24. Click **Print** on the Agency - Student Affiliations form to print a list of affiliated students.
25. Click **Close** to close the form.

Viewing and Editing Incidents

Users can track student conduct violations that need to be included within the Jeanne Clery Campus Crime Report. You can use the system to view all reported incidents for a campus.

To view all reported incidents for a campus:

1. Log into the campus for which you want to view incidents.
2. Navigate to **Daily > Contact Manager > Incident**. The Incident form is displayed. It lists all reported incidents for the selected campus.



Note: By default, the incident list is sorted by the date when the incident was reported, with the most recently reported incident displayed first.

3. To search for specific incidents already reported, enter the search criteria into one or more of the following fields:

   Student, **Staff**, **General Public**, or **Date Reported From - To**. To select names for a field, click ... to the right of the desired field. A form will appear that will allow a search to be performed for the desired name. Once the name is located, it will be placed in the appropriate field on the **Incident** form.

   Once the search criteria have been entered, select the **Search** button. The incidents that match the search criteria are displayed on the form. You may then select the **Edit Incident** or **View Incident** buttons as desired.

4. Select Report Incident to report a new incident.

5. Select an incident and click **Edit Incident** to modify the details for the selected incident.
6. Select an incident and click **View Incident** to view the details for the selected incident.

Note: A report can be printed from **Reports** > **Contact Manager** > **Incident Details** to display the same information shown on the **Incident** form.

Editing an Incident

You can report incidents as well as edit details of existing incidents. However, a user's ability to report or edit incidents is determined according to the security permissions set by the system administrator.

To edit an incident:

1. Navigate to **Daily > Contact Manager > Incident**. A list of previously saved incidents is displayed.
2. From the list of incidents, select the incident that you want to edit or view.
3. Click the **Edit Incident** button. The Edit Incident button is enabled only when the user has edit permissions. If the Edit Incident button is enabled, clicking the button will display the Report Incident form in edit mode and display details of the selected incident.
4. Enter a **Comment**. Saving this form is allowed only after a comment has been entered. If the Comment field is left blank, then an error message is displayed, and saving will not be not allowed.
5. You can add a student, staff member or member of the general public by clicking on the relevant Search button. A search form is displayed for the entry of search criteria and the subsequent display of one or more names. After locating the desired individual, double-clicking on their name in the search screen will place their name in to the Incident Report.
6. Each Student, Staff or General Public member listed on the report has a check box to the left of their name. When their name was initially added to the report, the check box was selected by default. If the check box is subsequently cleared, the person's name will no longer appear on the printed incident reports.

   Note: A persons name, once saved, will always appear on the Report Incident form whether the check box next to the name is selected or cleared. A person whose name is cleared is no longer deemed to be on the Incident Report. The person's name will not appear on any hard copy reports produced by the Incident Reporting modules of CampusNexus Student. However, the person's name will still appear on the Incident form seen on the computer with the name check box cleared. Names may not be deleted from the Report Incident form at any time.
7. Click **View History** to view a report that summarizes the changes made to the incident report being edited. The report lists the date of each change, who made the change, and the comment entered at the time of the change.
8. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

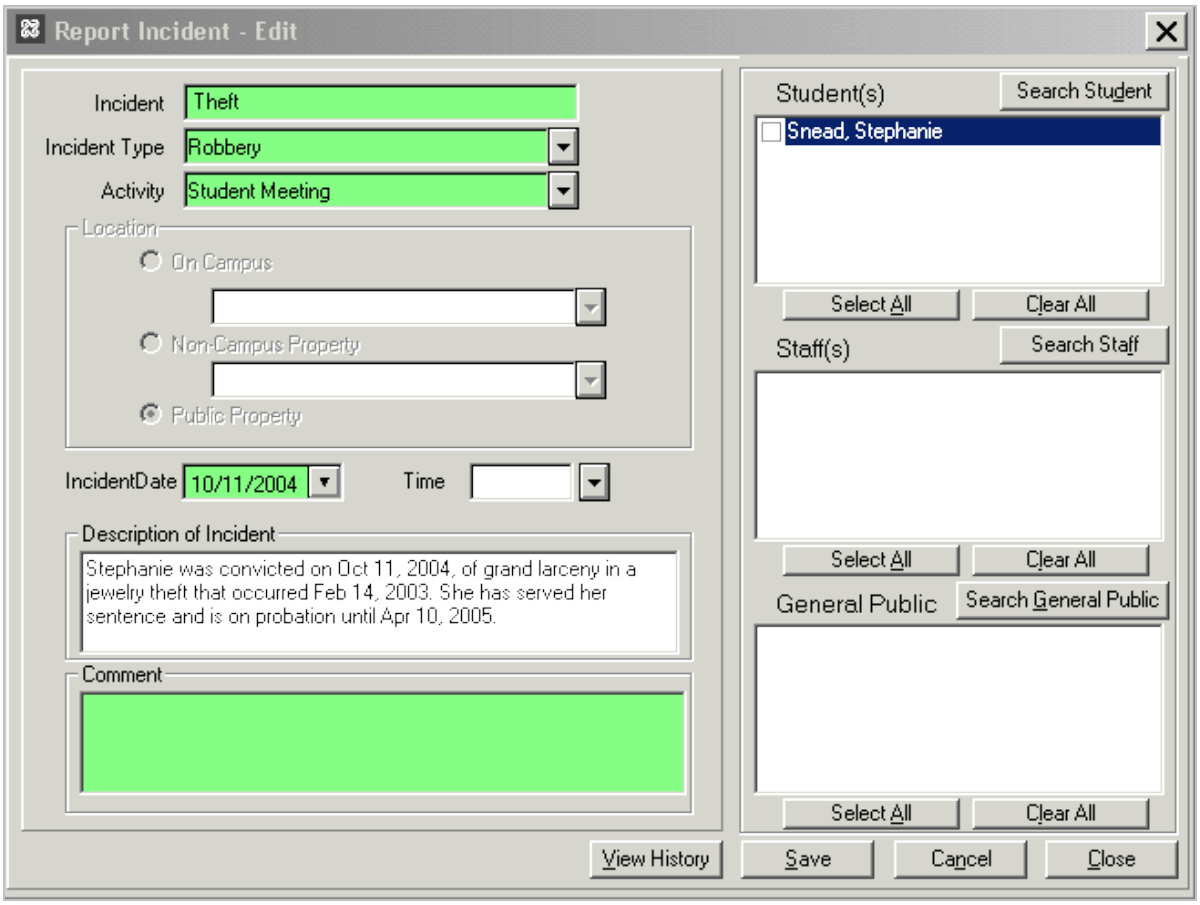
Reporting an Incident

Incidents tracked through the application reflect conduct violations that are periodically reported in the Jeanne Clery Campus Crime report. Users can report and track incidents involving more than one student, staff member or non-campus person (general public).

To edit or view existing incidents, see Viewing and Editing Incidents.

To report a new incident:

1. Select **Daily > Contact Manager** > **Incident**. The Incident form is displayed and displays a list of incidents in a particular campus.
2. Click the **Report Incident** button on the Incidents form. The Report Incident form is displayed.



Note: Create an activity (under Lists > Contact Manager > Activities) so that it appears on the Report Incident form (Activity list box) and can be selected thereafter.

3. Provide a code for the incident in the **Incident** field.
4. Select the **Incident Type** from the drop-down menu provided.
5. Using the radio buttons in the Location area of the form, chose one of **On Campus**, **Non-Campus Property** or **Public Property**. If Campus or Non-Campus Property are selected, chose an item from the associated drop-down box.

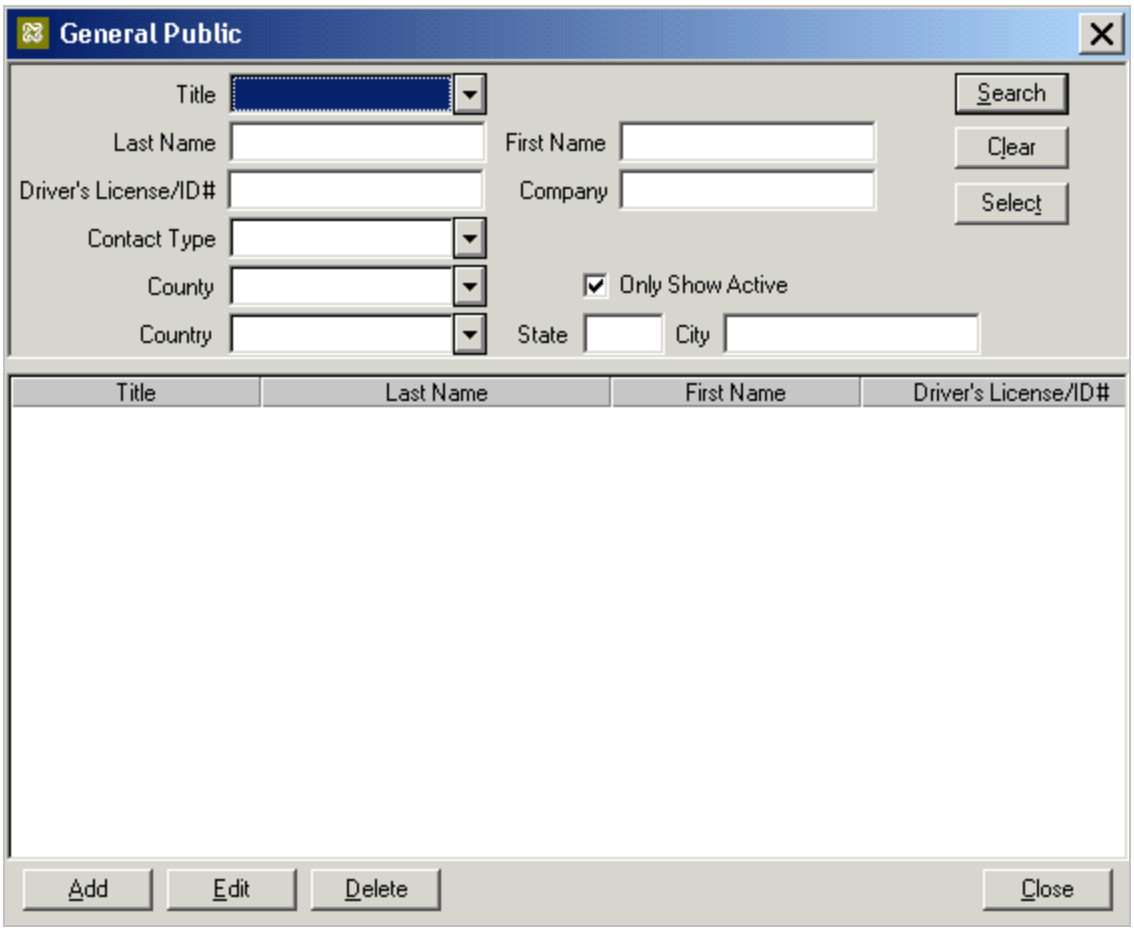
Note: To have the location drop-downs populated, you need to configure Lists > Student Services > Locations.

6. Select the date of the incident from the calendar provided in the **Date Start** field.
7. Select the **Time** that the incident occurred.
8. Provide a brief **Description of the Incident**.
9. Depending on the parties involved in the incident, click the **Search Student, Search Staff,** or **Search General Public** button(s) to find and then associate a student or students with the reported incident.

   The Search Student button displays the form that allows searches of all students:

   The Search Staff button displays the form that allows for staff member searches:

   The **Search General Public** button displays the form that allows a search of existing names contained in the General Public database.



10. For any of the search forms shown above, clicking on the name of a person found by the search will cause their name to be placed in to the Incident Report in the appropriate category (Student, Staff or General Public)
11. If, after searching the General Public database the individual is not found, click the **Add** button at the bottom of the General Public search form. A new form will appear in which information about the individual such as **Name**, **Title**, **Contact Type**, **Address**, **Drivers License** etc may be entered.

    Once the required information is entered it may be saved in to the database by clicking the **Save** button.

Note: Click **Select All** or **Clear All** to select or deselect all individuals listed on the incident report

12. Once names of students, staff or general public have been entered in to the report form ensure that the names have been selected by selecting the check box next to the name. If an individual should not be on the incident report the name may be cleared. When cleared, the name will remain on the incident report form but will not appear on any of the incident reports produced by CampusNexus Student.
13. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

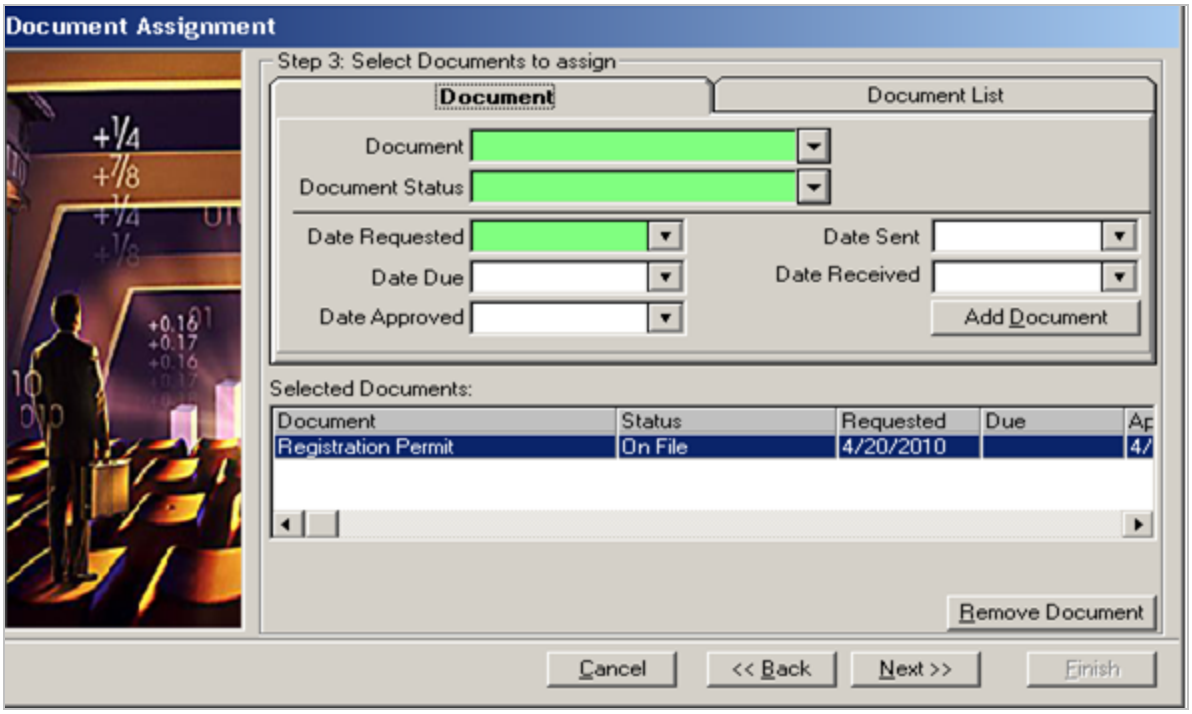
Assigning Documents

Required documents are assigned to students by program as part of the enrollment process. For details, please refer to Document Lists. Documents can also be assigned to groups of students at any time using the Document Assignment tool.

To assign documents to student groups:

1. Navigate to **Daily > Contact Manager > Document Assignment**. Step 1: Student Selection Criteria is displayed.
2. Use the drop-down lists to select a Campus, Version Start Date Range, Academic Year Start Date Range,, Graduation Date Range, Degree and Student Group.
3. Click **Next** to proceed. Step 2: Select the Student Statuses and Program Versions to be Included is displayed.

   Use the check boxes to select the School Statuses to include or click **Select All** or **Clear All**.
4. Use the check boxes to select Program Versions to include or click **Select All** or **Clear All**.
5. Click **Next** to proceed. Step 3: Select Documents to Assign is displayed.

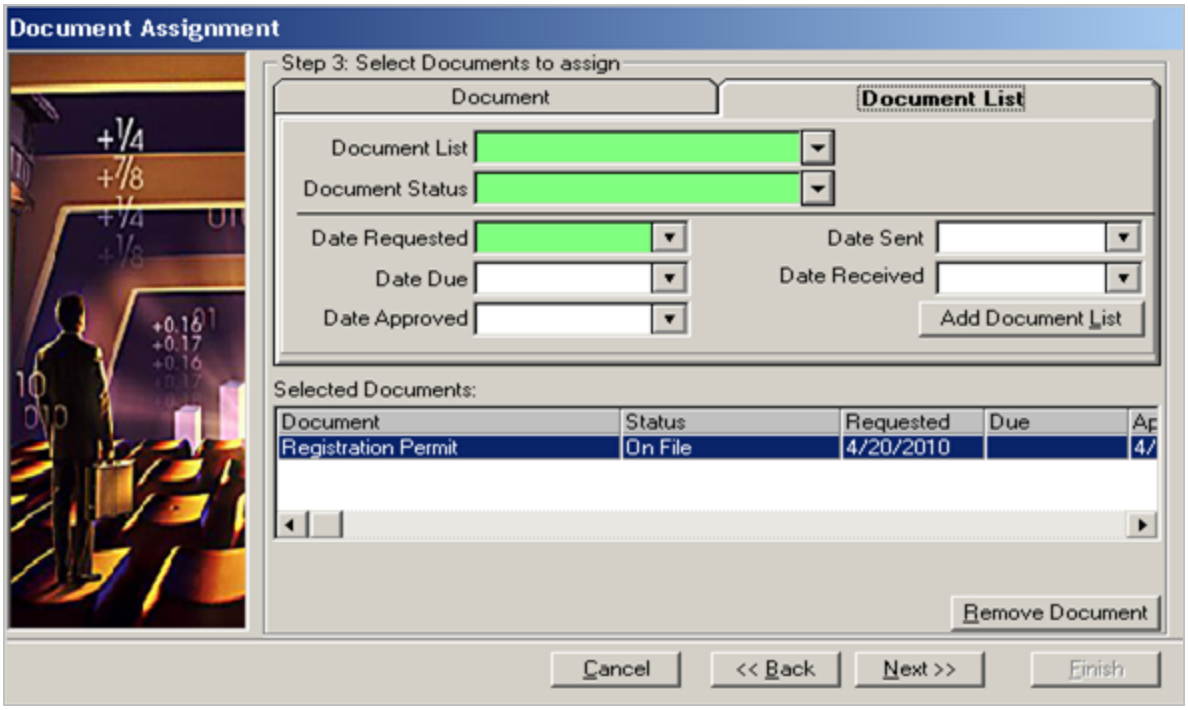


Complete the fields as follows:

- **Document**: Select a document to assign to the group.
- **Award Year**: This field is available only if the document you have chosen is an award-year specific Financial Aid document. Choose an award year from the list.
- **Document Status**: Choose the present status for the document. Options are On File, Required, and Received but Rejected.
- **Date Requested**: Select the date on which the document was requested.

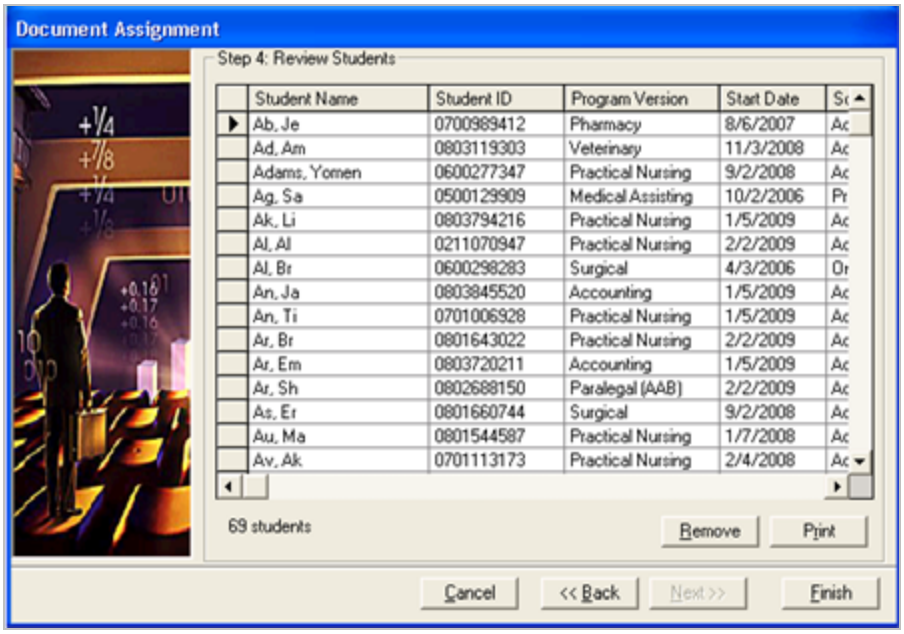
- **Date Sent**: Select the date on which the document was sent to your school.
- **Date Due**: Select the date on which the approved document must be on file with your school.
- **Date Received**: Select the date on which the document was received by your school.
- **Date Approved**: Select the date on which the document was approved by your school.

6. Click **Select Document**. The document is displayed in the Selected Documents grid.
7. To remove a document from the grid, select the document and click **Remove Document**.



This tab functions the same way as the Document Tab. The only difference is that the user can select a Document List. Document Lists are packages of documents, set up in Document Lists. Examples of document lists could be Financial Aid Documents or Enrollment Documents.

8. Click **Next** to proceed. Step 4: Review Students is displayed. The grid displays all students who meet the filtering criteria specified in previous steps. The number of students in this batch is displayed in the lower left of the form. To remove a student from this list, select the student in the grid and click **Remove**.



9. Click **Print** to generate the Document Report. This report features the Students' Names, ID, Program Version, Start Date and Graduation Date.
10. Click **Finish** to save your document assignments.

Modifying Batch Activities

You can modify batch activities in Contact Manager. You can also reassign activities from one staff member to one or more other staff members. You can change, delete or update activities, activity type, and/or activity status. A notification is displayed to the user to confirm the batch action in progress and offer an option to cancel out of the action.

Batches of activities may be selected for modification from multiple campuses. Students may be filtered on the basis of Student Groups, Zones and States.

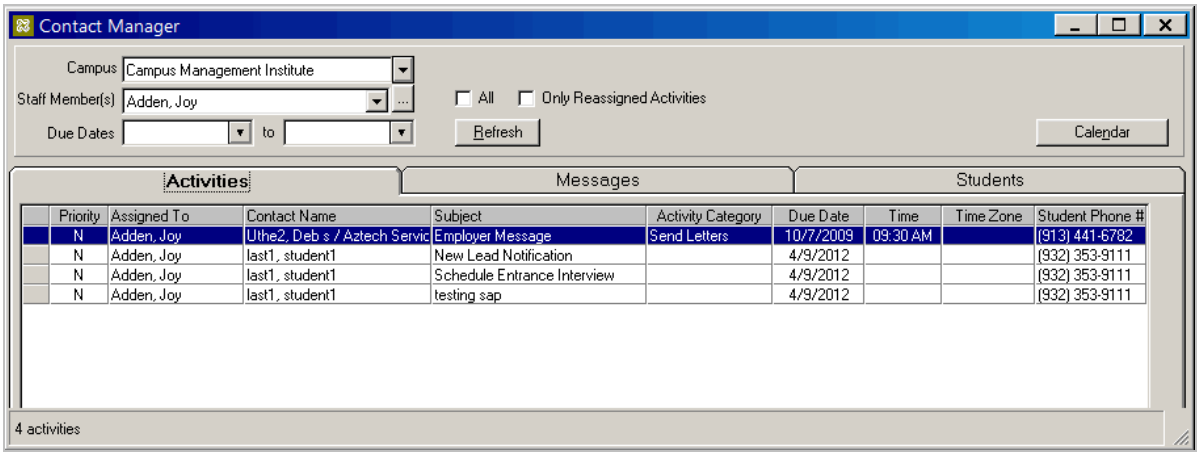
Note: To delete batch activities in Contact Manager, view this topic.

When activities are reassigned from one staff member to another, the new staff member receives a notification message. The notification message, 'Activities have been reassigned to you. Would you like to view them now?' is displayed only once when the staff member logs in to CampusNexus Student. Likewise, when activities are reassigned to multiple staff members, the notification message is displayed once to all members with the reassigned activities when they log in to the system. Only one message is displayed when multiple activities are reassigned to the same staff member.

If the staff member is logged on to the system and activities are reassigned, the staff member sees the activities without logging off. The notification message will not appear the next time the staff member logs on to CampusNexus Student. If no activities are reassigned to the staff member, the notification message is not displayed.

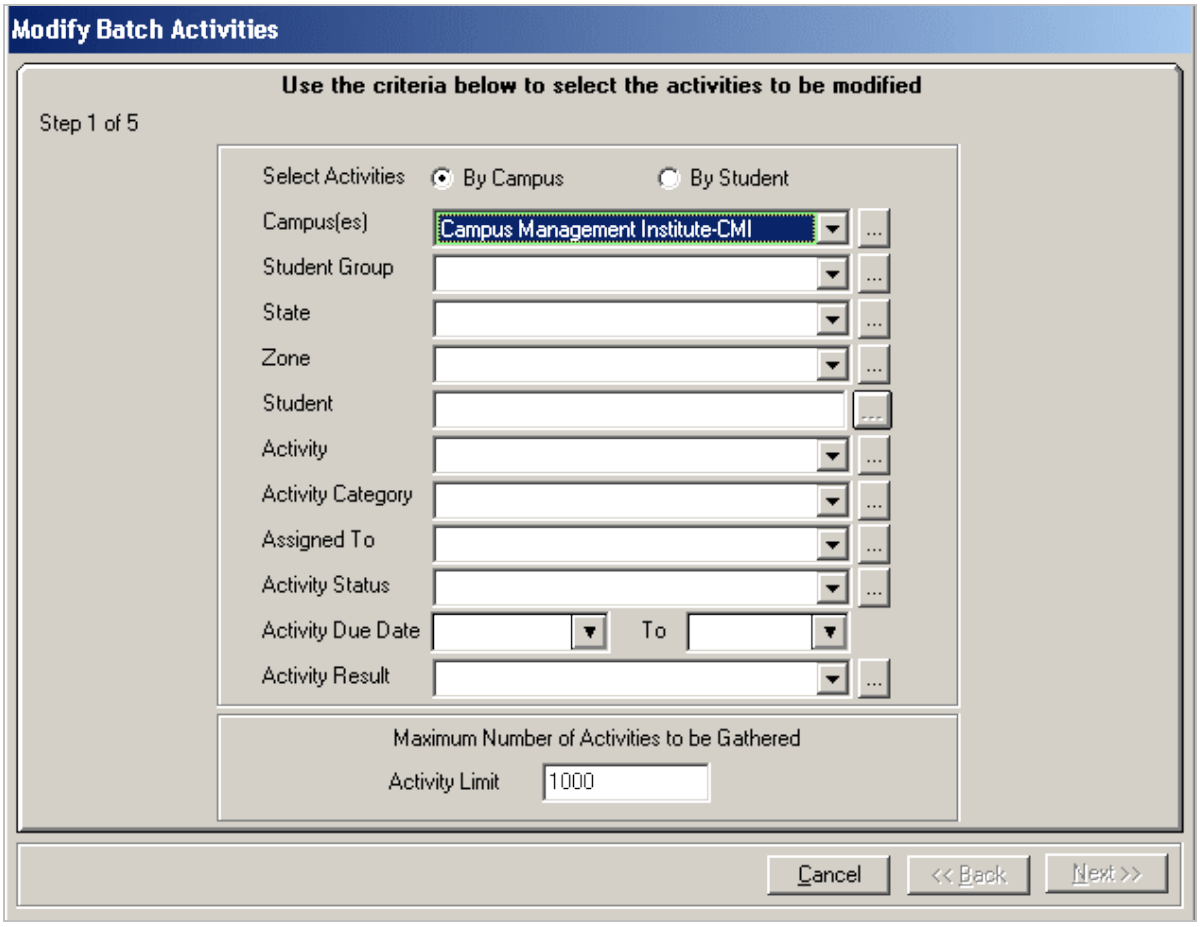
When the notification message is presented, the staff member can view the newly assigned activities. If the staff member decides not to view the reassigned activities and clicks 'No' on the notification message, Contact Manager displays all the activities listed.

Note: By default, the 'Only Reassigned Activities' check box is cleared. When selected, the check box is displayed only when the staff member selects the Activities tab. On the Activities tab, a new column 'Reassigned Date' has been added.



To modify activities in a batch mode:

1. Navigate to **Daily > Contact Manager > Modify Batch Activities**. The **Modify Batch Activities wizard** is displayed. Select the applicable option(s) to select the activities to be modified on the Step 1 form and click **Next**.



a. The **Select Activities** radio button allows activities to be selected **By Campus** or **By Student**. When **By Campus** is selected, the **Student** select box is disabled. When **By Student** is selected, the **Campus(es)**, Student **Group, Zone**, **State**, and **Zone** is disabled.

b. One or more **Campus** may be selected through the use of the multi select control. The list of campuses is populated based upon the campuses to which the user has been granted access.

c. One or more **Student Group** may be selected through the use of the multi select control.

d. One or more **State** may be selected through the use of the multi select control.

e. One or more active **Zone** may be selected through the use of the multi select control. The list of zones will be populated based upon the campus(es) which the user had previously selected.

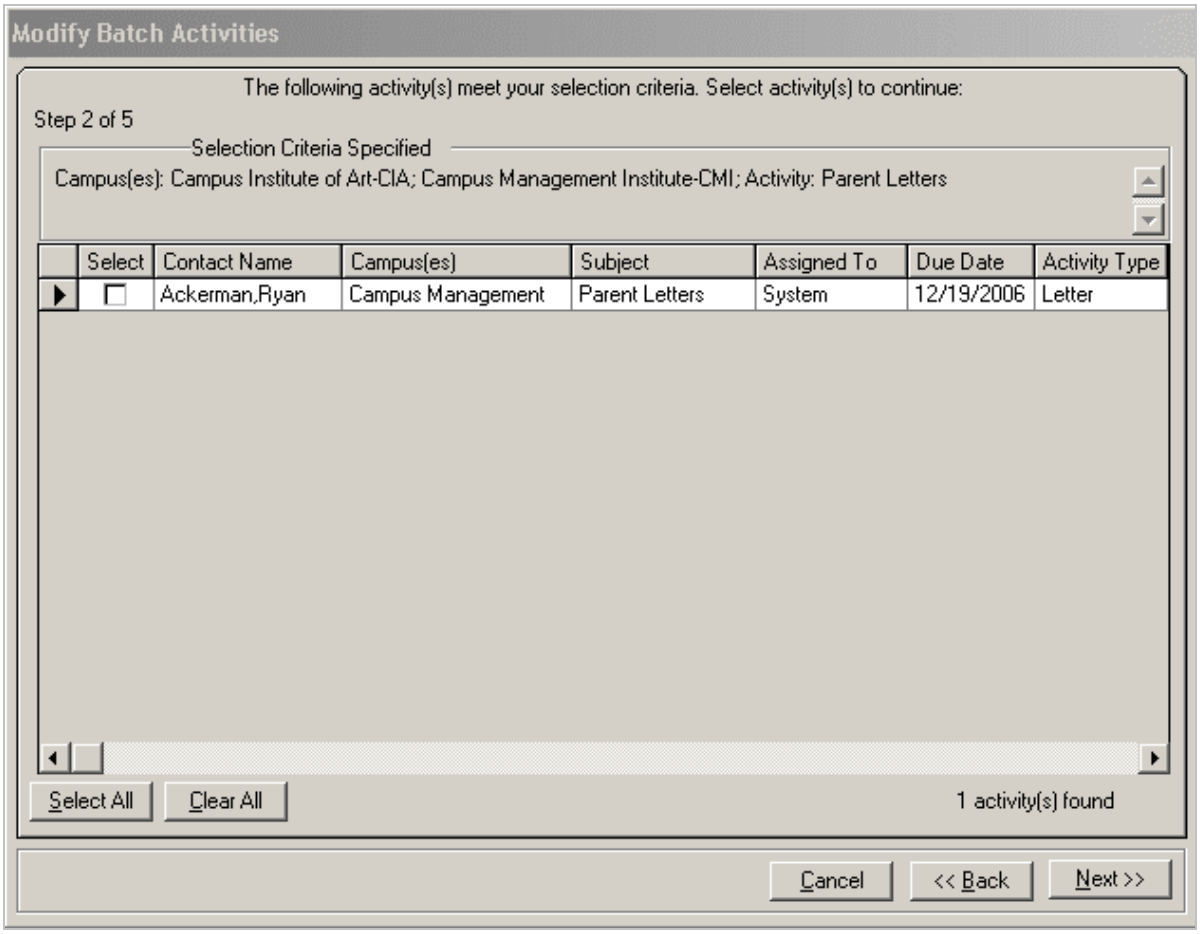
f. One or more **Activity** may be selected through the use of the multi select control. If the activities were selected **By Campus**, then the activities from the selected campuses are shown. If the activities were selected **By Student**, then activities for the selected student are shown. Only activities that are contained within the activity policy defined for the user are shown.

g. The **Assigned To** list is based upon the **Select Activities** choice. If **By Campus** was selected, only staff associated with the selected campus(es) is shown. If **By Student** is selected, only staff who have been associated with the student's activities are shown.

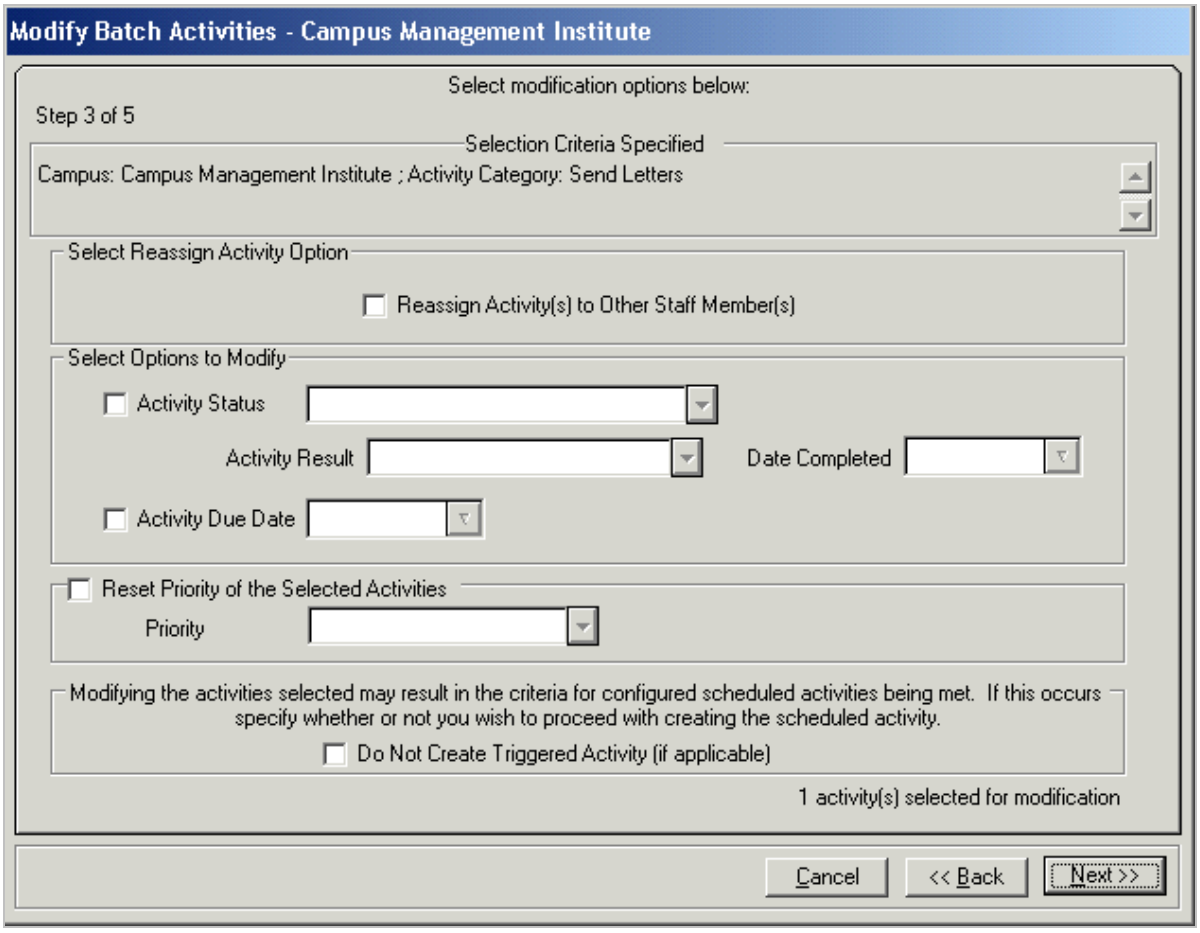
h. The **Activity Status** and **Activity Result** selection lists shows all available records when selecting activities

By Campus. If selecting activities **By Student**, records belonging to the activities of the selected student are shown.

2. Step 2 of the wizard is displayed. The entries displayed reflect the selections made from Step 1. Select the listing (s) to modify and click **Next**.

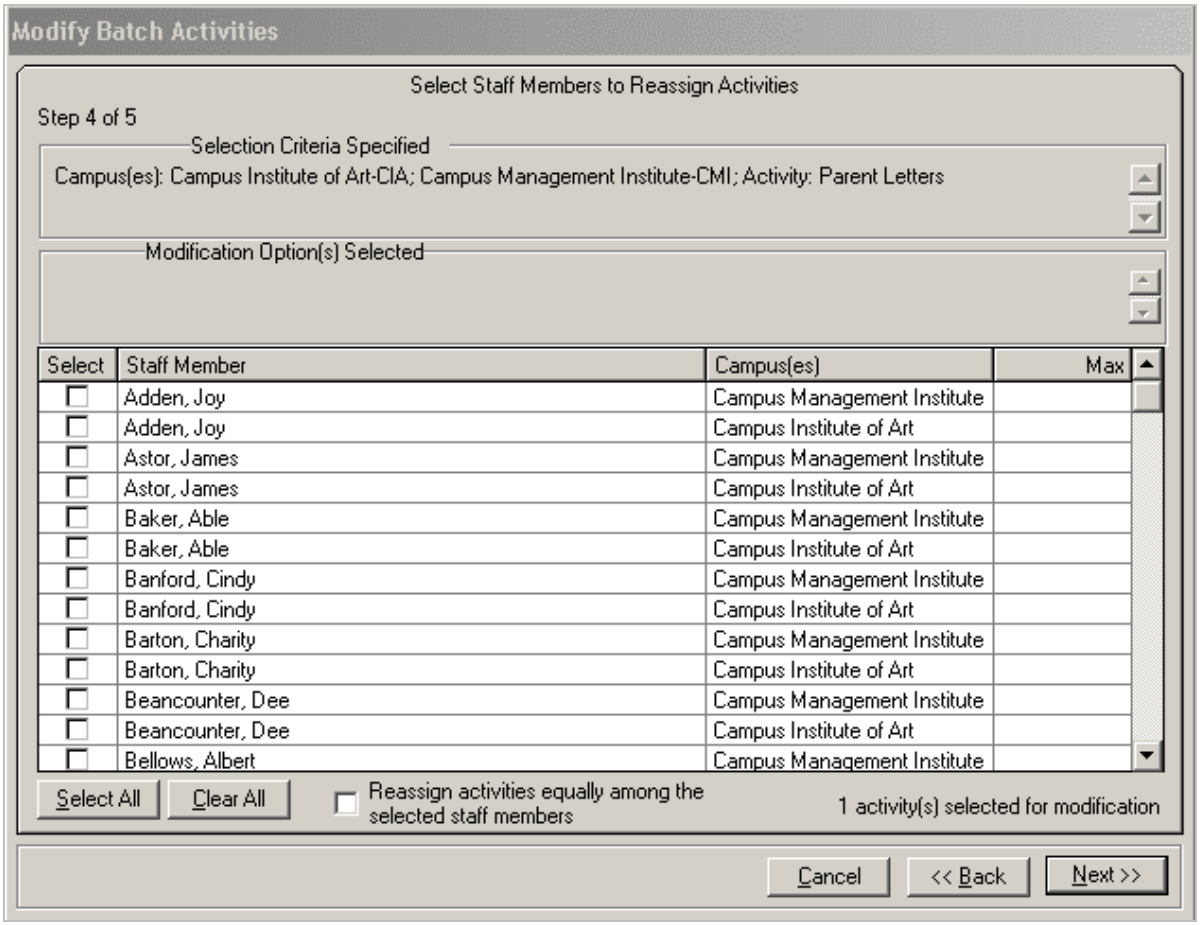


3. In Step 3 of the wizard, make your selection(s) and click **Next** .



4. Step 4 of the wizard is displayed, depending on the selection(s) made in Step 3.

   If the **Reassign Activity(s) to Other Staff Member(s)** option was selected in Step 3, a message is displayed stating *'You may specify other criteria and/or click Next to specify staff members to reassign activities to.'* Click **OK** and click **Next**. A list of Admissions Reps to whom activities may be reassigned and who belong to the campuses selected in Step 1 is displayed in Step 4. Select the staff member(s) to whom the activities are reassigned and click **Next**.

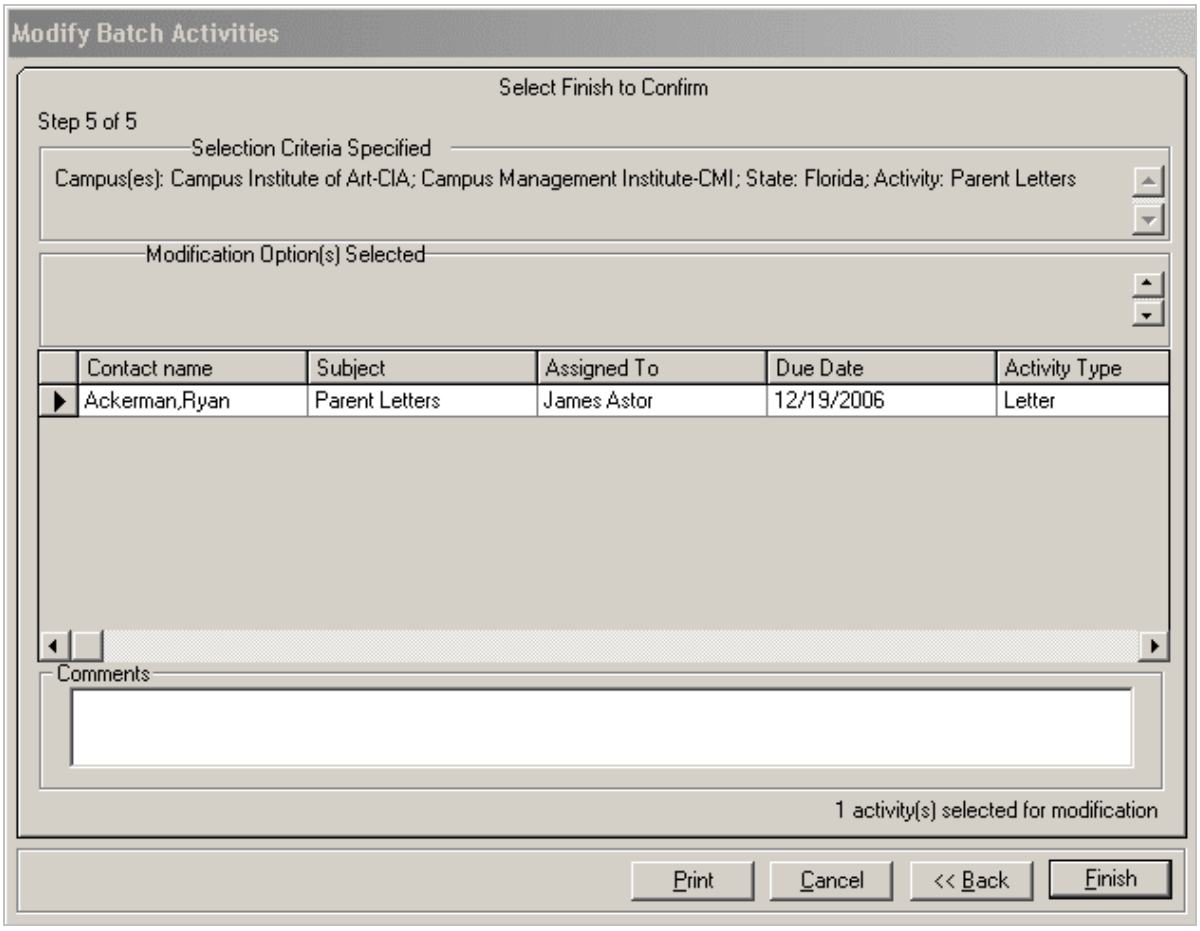


When the **Next** button is clicked, CampusNexus Student checks for:

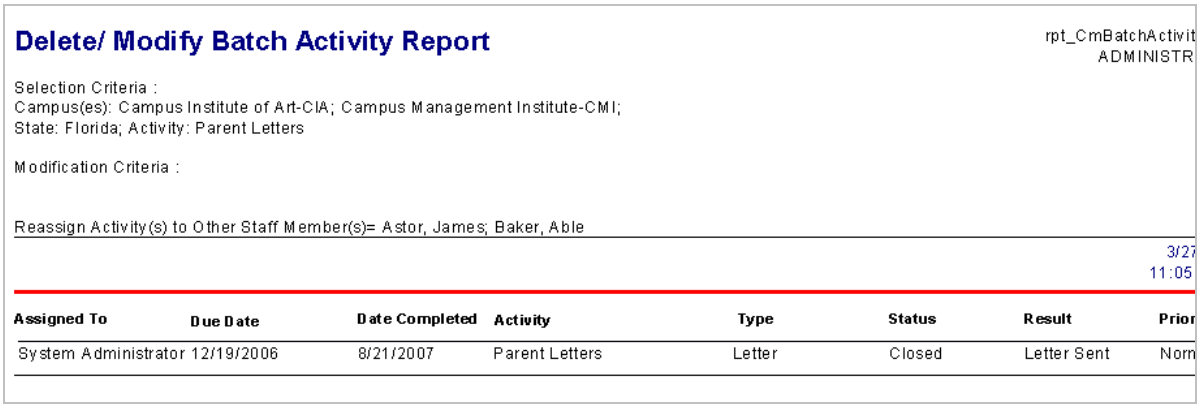
- at least one staff member selection
- comparison of total activities assigned and total activities selected
- any campus corresponding to which no assignment of staff is done OR
  fewer activities assigned to total staff members of corresponding campuses than the total activities for each campus.

If any of the checks above fail, the following message is displayed: 'Activities selected are more than the activities distributed among the selected staff member of selected activity's campuses. Please redistribute activities'.

5. If **Closed** was selected from the **Activity Status** drop-down list, the **Activity Result** and **Date Completed** fields become enabled, otherwise the **Activity Due Date** drop-down list becomes enabled and available for selection. Step 5 is displayed when **Activity Status** is selected in Step 3.
6. Select the **Reassign activities equally among the selected staff members** option if desired.
7. Step 5 of the wizard is displayed. Your selections appear on the top of the screen. Add any comments that you would like to make in the **Comments** field and click **Finish**, or click **Print** to print a report.



When you select the **Print** option, the following report is displayed.



Delete/ Modify Batch Activity Report

rpt_CmBatchActivit
ADMINISTR

Selection Criteria :
Campus(es): Campus Institute of Art-CIA; Campus Management Institute-CMI;
State: Florida; Activity: Parent Letters

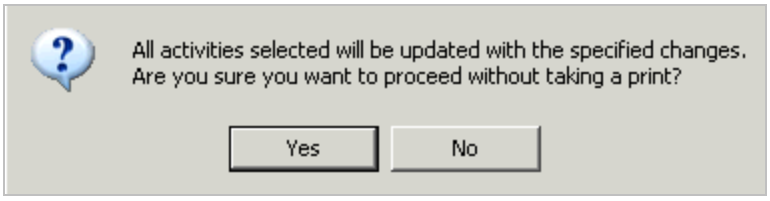
Modification Criteria :

Reassign Activity(s) to Other Staff Member(s)= Astor, James; Baker, Able

3/27
11:05

Assigned To	Due Date	Date Completed	Activity	Type	Status	Result	Prior
System Administrator	12/19/2006	8/21/2007	Parent Letters	Letter	Closed	Letter Sent	Norm

The following message is displayed.



Click **Yes** to continue processing, click or **No** to return to the previous screen and click **Print** to print the report.

8. When activities are being reassigned across multiple campuses, the system only reassigns activities to staff members of the student's campus only. When **Finish** is clicked and multiple campuses and staff are involved, the distribution occurs as follows:

Activities to be Modified

Activity	Student's Campus
A	1
B	2
C	3
D	1
E	2
F	3
G	1
H	2

Staff to be Reassigned

Staff ID	Campuses Selected	Max
1	1,2,3	4
2	1,2	3
3	3	1

Final Distribution made by 'Modify Batch Activities' wizard

Staff ID	Total Number of Activities	Logic
1	4 (A,B,C,D)	As Staff 1 is in 3 campuses, for each campus 1st activity is assigned to Staff 1
2	2 (E,G,H)	As Staff 2 is in 1 & 2 campuses only, activities from Campus 1 & 2 will be assigned. Since first activities for both campuses were assigned to Staff 1, the next activity for Campuses 1 & 2 will assigned to Staff 2.
3	1, (F)	As Staff 3 is in Campus 3, activity from Campus 3 will be assigned to Staff 3.

9. A confirmation message is displayed. Click **OK**.

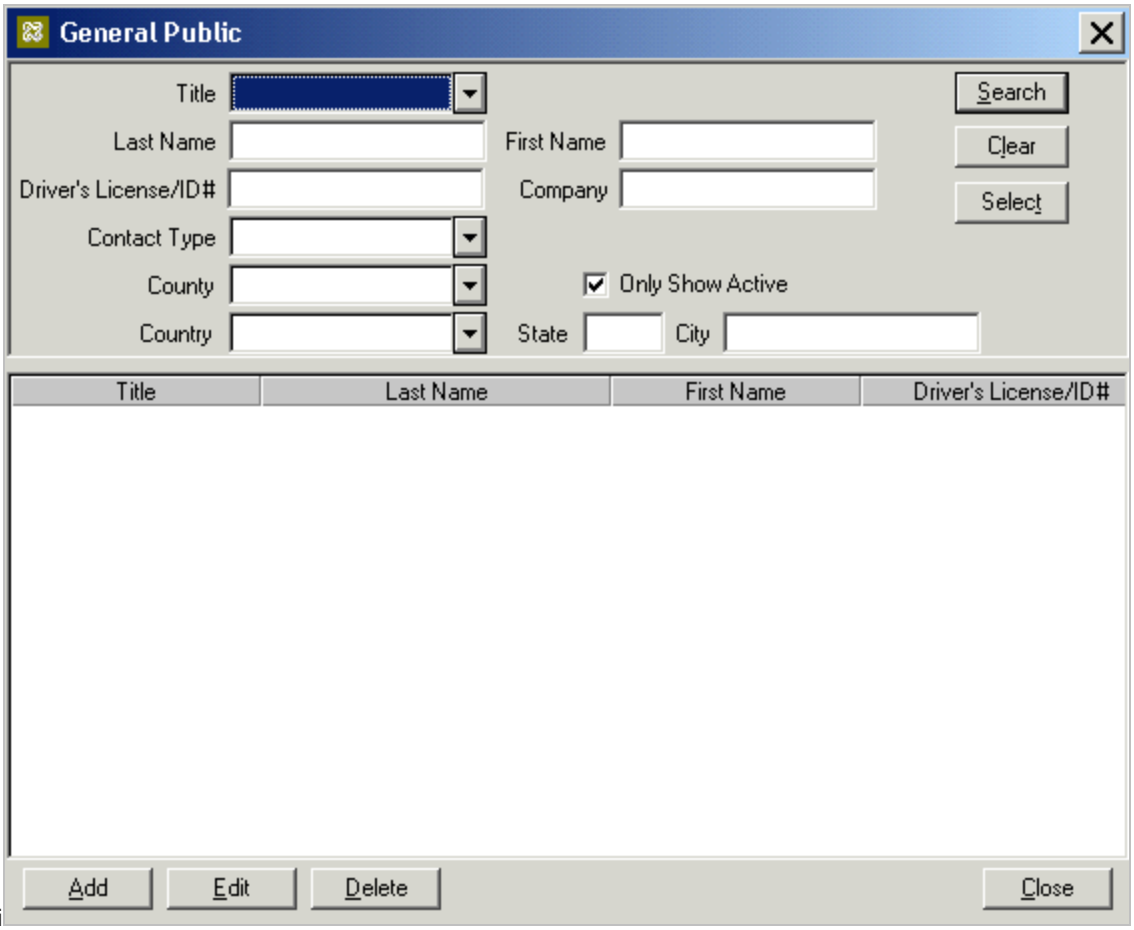
Working with General Public Data

The General Public form is used to search, add, edit or delete information about members of the General Public. This form is used in conjunction with the Incident Reporting form which records information about campus crime incidents that must be reported and published as required by the Jane Clery act.

Individuals whose information is recorded with this form are members of the general public who were involved in a reportable incident as required by the Jane Clery act. Names of individuals who are not already stored in CampusNexus Student as staff or students but were involved in an incident will be recorded using this form as part of the incident reporting process.

This form is part of the Incident Reporting process but may also be displayed by navigating to **Daily > Contact Manager > General Public**.

The form allows for searching, adding, editing or deleting of names and information about general public members.

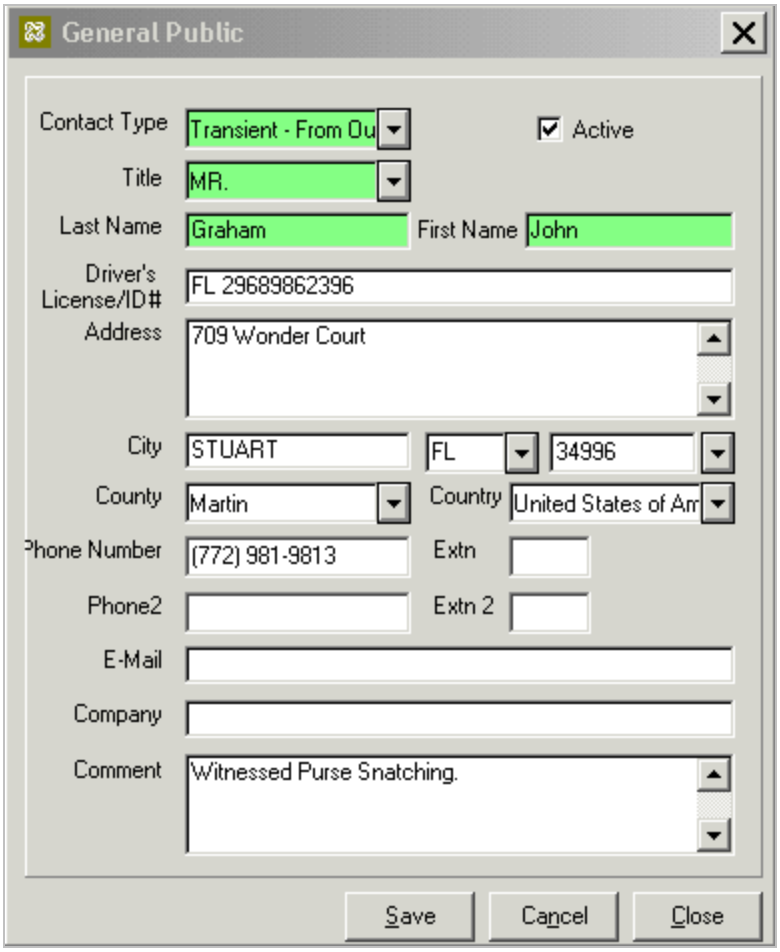


li

Searching for a Record

To Search for one or more individuals:

1. Enter one or more Search Criteria in any of the fields located in the top portion of the form.
2. Click **Search**. A list containing individual(s) names that match the search criteria is displayed on the form.
3. To display the individual's record, click on the row containing the desired name.



4. If desired, make changes to the information and click **Save**.
5. Click **Close** to close the form.

Adding a General Public Record.

To add a new member to the General Public database:

1. Click **Add** at the bottom of the General Public form.
2. In the **Contact Type** list, chose the desired contact type.

   Note: Contact Types should have previously been defined in Lists > Admissions > Contact Type.
3. Select the desired title from the **Title** list.
4. Enter the Last Name and First Name.
5. Enter information as required in to the optional fields: Driver's License, Address, City, State, ZIP Code, County, Country, Phone Numbers and Extensions, E-Mail, Company and Comment.
6. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Editing an Existing General Public Record

To edit an existing record:

1. Perform a Search using the General Public form as described in the Search description above.
2. Double-click on the desired name in the list on the lower half of the form, or click the name once and then click **Edit**.
3. Update the fields in the record as required.
4. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Deleting a General Public Record

Note: An existing record may not be deleted if the individual in that record is already associated with an Incident. If an attempt is made to delete a record that is associated with an incident, a message is displayed indicating that the record may not be deleted. The person named in the record may be disassociated from the incident from within the Incident Record. However, the record may still not be removed from the database since it has been previously associated with an incident.

To delete an existing record:

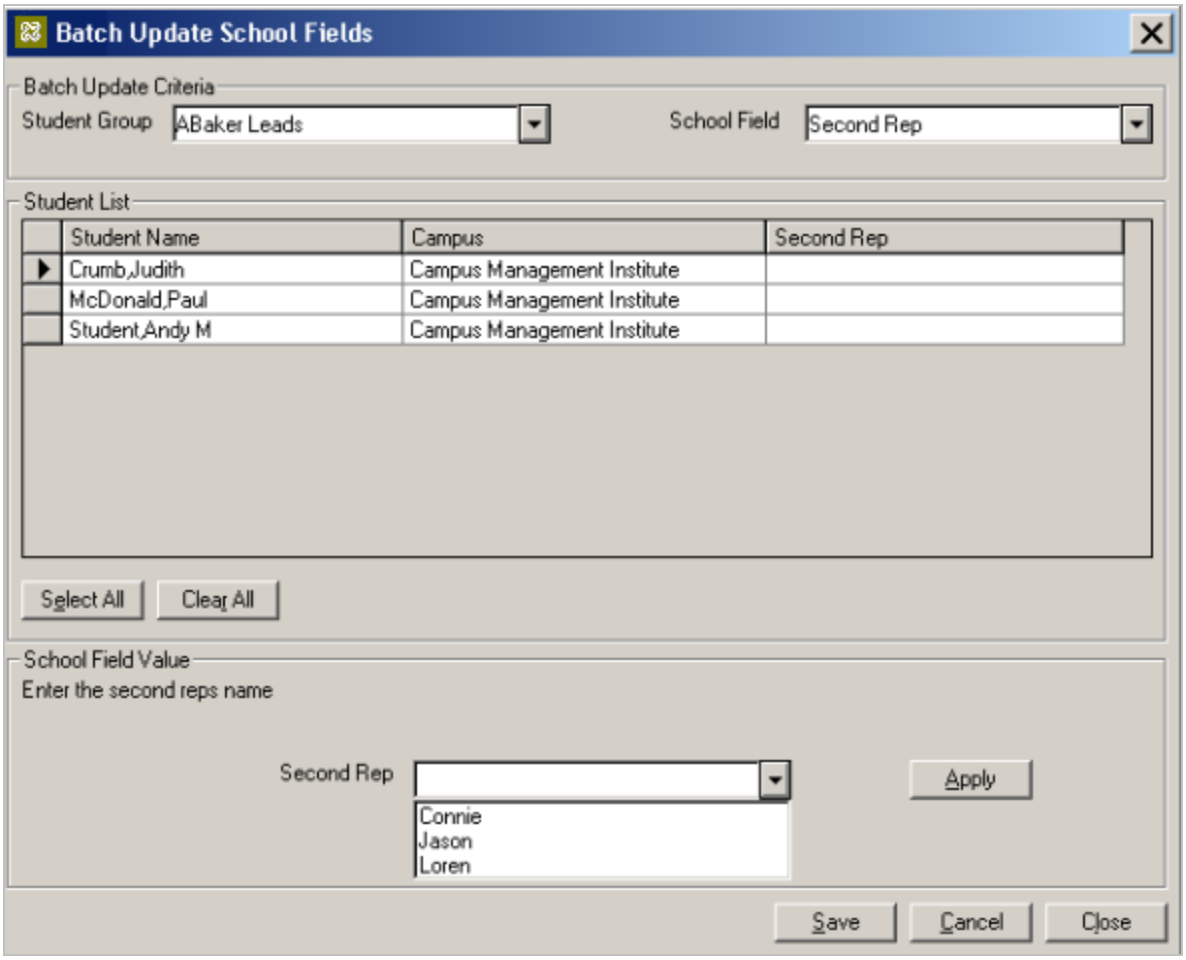
1. Perform a Search using the General Public form.
2. Click the name once and then click **Delete**. A dialog box is displayed asking if it is OK to delete information about the individual.
3. Click **Yes** to remove the record form the database.

Processing School Field Batch Updates

The Batch Update School Fields form enables you to update school-defined fields in a batch format, including the ability to blank out specific fields.

To process school field batch updates:

1. Navigate to **Daily > Contact Manager** > **Batch Update School Fields**. The following form is displayed.



2. The 'Student Group' drop-down field (in the Batch Update Criteria section) is prepopulated with student groups if the form is opened from View > Student Groups and the **Update School Fields** button is clicked. When this form is opened from Daily > Contact Manager > Batch Update School Fields, this field is not populated.

   In either case, you can select among all student groups (depending on your access permissions) from the **Student Group** drop-down list.

3. Select the school-defined field to be updated from the **School Field** list.

   Note: Once the Student Group and School Field fields are populated, the Student List section is populated with all students in the appropriate student group. Columns in the grid include: Student Name, Campus, and the value of the selected School Field.

4. Select one or more students from the grid to make your updates. For multiple 'consecutive' row selections, hold

down the **Shift** key and click on each applicable row. For 'non-consecutive' row selections, hold down the **Ctrl** key and click each applicable row. To select all students in the grid, click **Select All** or click **Clear All** to clear your selections.

5. Once you have made your student selections, select a new value in the **School Field Value** section and click **Apply**. The grid will refresh.

   Note: When School Defined Fields are configured, help text can be entered. This help text is displayed in the School Field Value section of this form.

6. Click **Save**.

Note:

The message *"School Defined Field Value(s) have been modified. Do you want to save?"* is displayed if you changed values and try to do any of the following operations before saving them:

- Change the value in the **Student Group** list.
- Change the value in the **School Field** list.
- Click **Cancel**.
- Click **Close** to close the form.

Daily > Admissions

The Daily > Admissions submenu options include:

- Process Electronic Leads
- Process Online Applicants
- Advertising Expenses
- Document Tracking
- Enroll Student
- Reassign Leads
- High Schools
- Allocate Budgeted Starts
- Transfer Credits
- Manage Course Relationships
- Batch Quick Lead Entry
- Admission Rep Maintenance
- Import Test Scores
- Match Test Scores
- <Detach> (This options detaches the submenu.)

Processing Electronic Leads

Leads can be imported from electronic sources outside of the system and displayed within the system as a list of all students in the Electronic Leads table (AmElectronicLeads). Leads can be added to the Electronic Leads table through Portal, the school's Web interface or any other third party process.

CampusNexus Student does not post leads to this table; it is the responsibility of the institution to design a method of posting to this table. For example, you may have an Internet application or other custom program that captures inquiries from persons interested in your school. If your system administrator, in-house data administrator, or programmer, can use the appropriate tools, he/she can insert data into the Electronic Leads table.

Refer to Web Interface Overview for more on setting up your school's website.

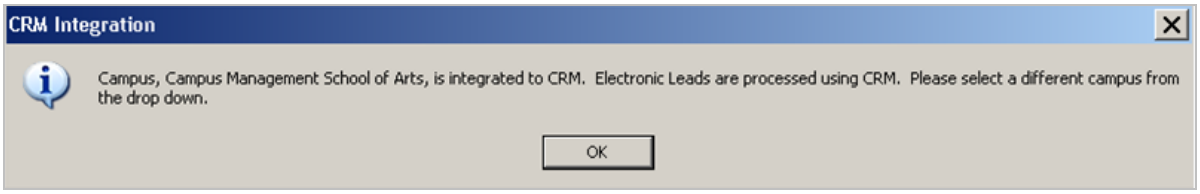
The system also enables authorized users to identify duplicate leads and process such leads according to school-defined rules.

See also Duplicate Lead Processing for setup and configuration information.

We recommend that you discuss your plan for importing electronic leads with Support (1-800-483-9106) before attempting to use this feature.

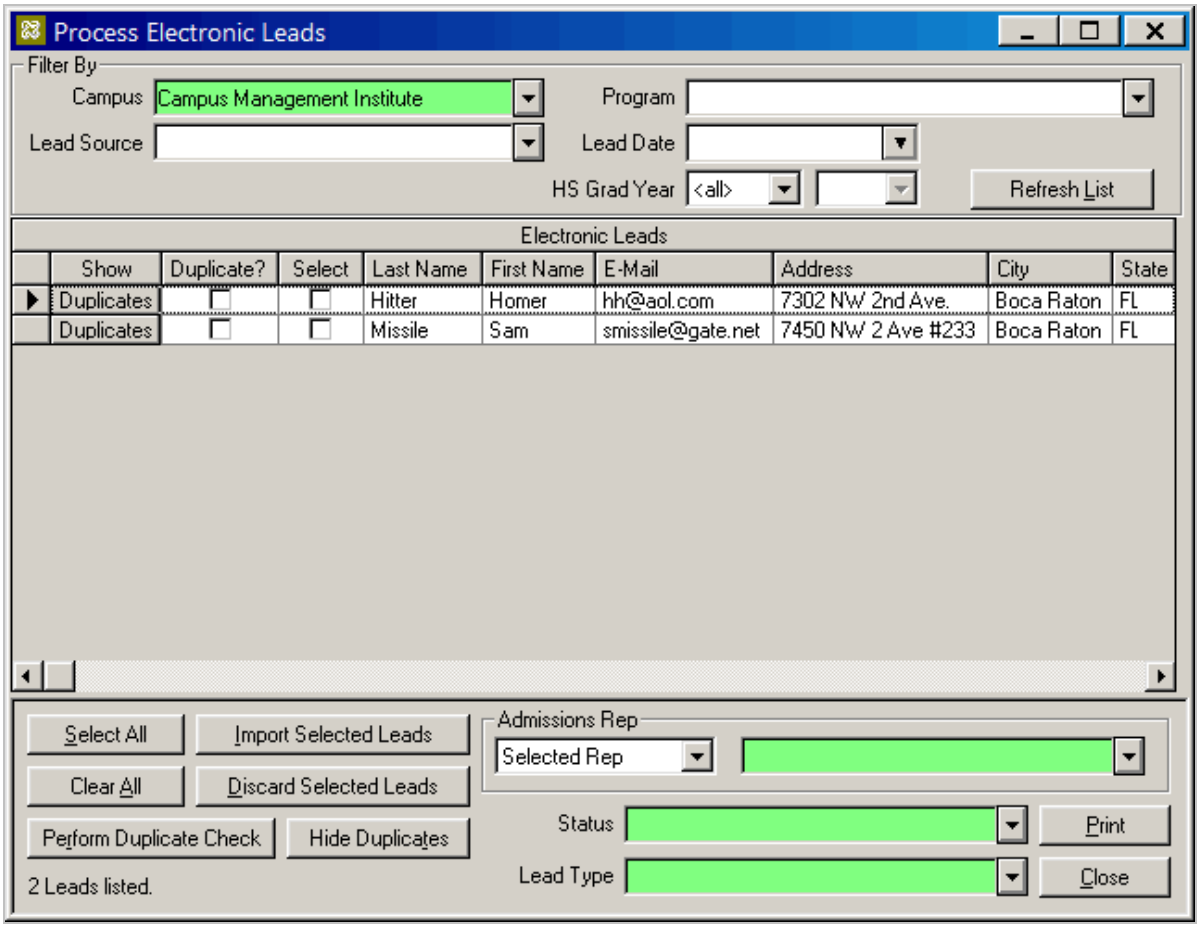
Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

When Processing Electronic Leads for the default campus and if both the (system level) **CRM Integration** and (campus level) **Enable CRM Integration** check boxes are selected, but the (campus level) **Enable new lead entry from CampusNexus Student when CRM is integrated** check box is cleared, the following message is displayed:



To process electronic leads:

1. Navigate to **Daily > Admissions > Process Electronic Leads**. The Process Electronic Leads form is displayed.



2. In the **Filter By** section, select the filtering criteria you want to use, including the **Campus(es)** and **Program** for which the electronic leads are to be processed; the **Lead Source** from which they were obtained, and the **Lead Date**.

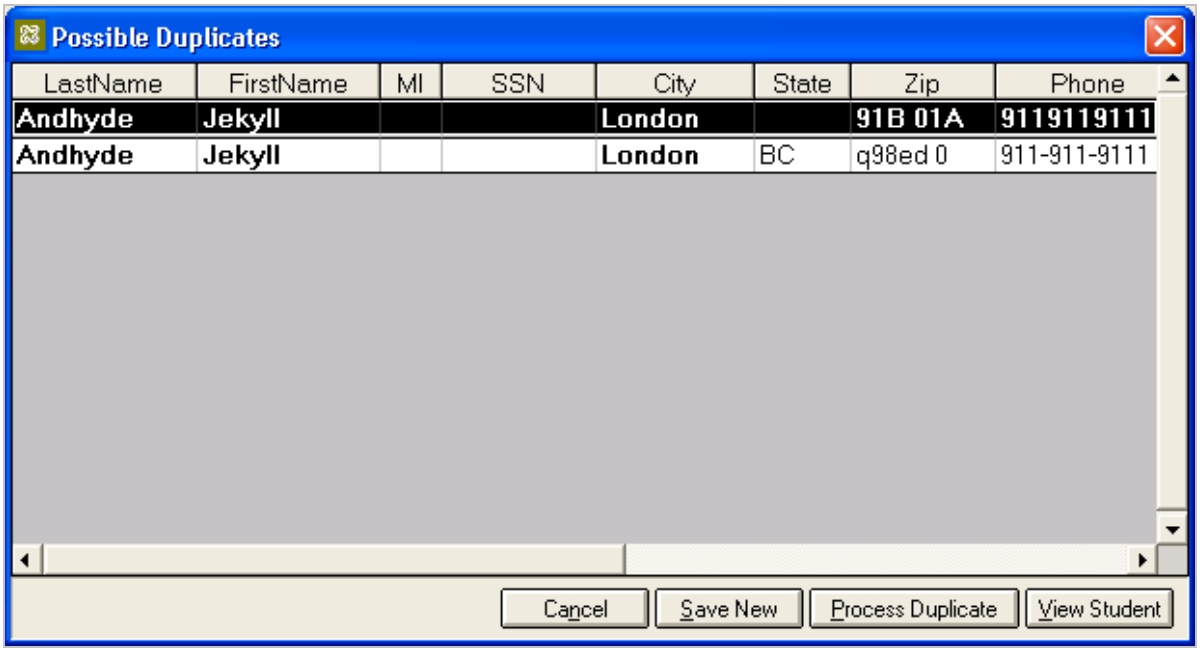
   Note: Select **All Campuses** to include leads with no campus designated and all campuses to which you have access. Otherwise, you can select a single campus from your campus list. Click **Select All** or **Clear All** and add/clear campuses individually for speed and ease of use.

3. Click **Refresh List**. Lead records that were identified as having possible duplicates on file when the lead information was initially captured will be loaded into the Electronic Leads grid. For each possible duplicate record already on file, the following information - if available - will be listed: first and last name, email address, street address, city, state, ZIP, phone, other phone, lead date, source, campus, program, interest, and comments, high school graduation year, and date of birth.

   Note: When Processing Electronic Leads for the default campus, if both the (system level) CRM Integration and (campus level) **Enable CRM Integration** check boxes are enabled, but the (campus level) Enable new lead entry from CampusNexus Student when CRM is integrated check box is disabled, and you have selected 'All Campuses' in the **Filter By** section, leads associated with the CRM enabled campus(es) will not be returned in the list for processing.

The active Admission school-defined fields associated with the electronic lead will be listed. When new student master records are created from the imported electronic leads, these fields are associated with the correct Student Master record. If the override option is selected, then the school-defined fields from the Electronic Lead process will override the student master record when processing duplicate leads.

4. Select the check box in the **Select** column for a particular record and click **Perform Duplicate Check**. If the new lead record is a duplicate of any of the possible duplicate records listed, a check mark is displayed in the **Duplicate?** cell that corresponds to that record.
5. Click the word **Duplicates** in the Show column that corresponds to a record to see all existing records for this New Lead.



Note: If the new lead record is a duplicate, the user can indicate that the system shall update the existing Student Master record with information from the latest Lead. It will be processed according to school-defined rules. If the user has duplicate override permission, the users can create a New Lead record even if possible duplicates are on file for the selected record. This action will trigger a preconfigured Contact Manager activity.

6. Click **Save New** to update the existing Student Master with data from the New Lead form.
7. Click **Process Duplicate** to update an existing record.
8. Click **View Student** to see the Student Master record for a selected New Lead.

If the new lead record is not a duplicate, you can import this lead, if you have override permission to do so.

- Select those leads that you want to import by checking the rows in the Select column. Note that you can click the Select All or Clear All button to assist in the selection process. Records that are deselected remain in the grid but are neither imported nor discarded.
- Specify the **Lead Source**, (school), and **Admissions Rep** who will be assigned to the lead.
- Click the **Import Selected Leads** button. If the lead is imported, then the new lead will be removed from the

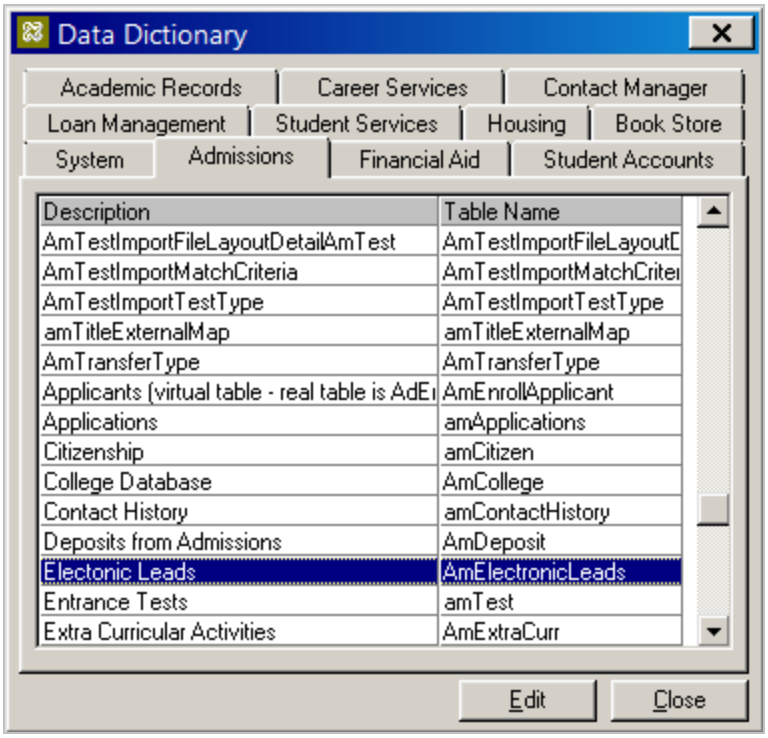
grid on the Process Electronic Leads form.

- If you decide not to import the lead on this form, then the check box will be selected for this new lead on the grid when you return to the Process Electronic Leads form.

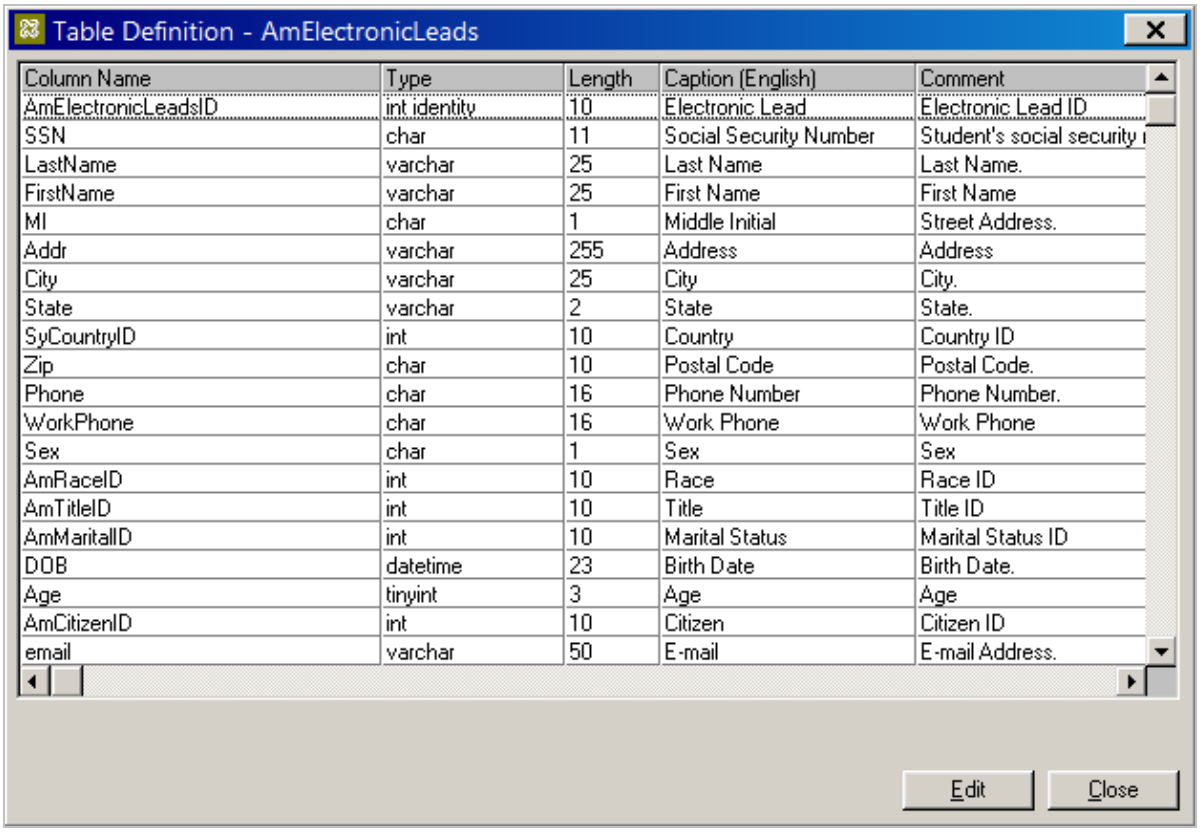
9. If there are leads that can obviously be discarded, for example those with insufficient or obviously invalid information, select the column and click **Discard Selected Leads**. The program will remove them from the table.
10. Click **Hide Duplicates** to have the program remove any rows that it determined to be possible duplicates from the screen. The program will not remove them from the table and they will be available for future sessions of processing electronic leads.
11. Click **Print** to print all selected records.

Electronic Leads Table

The Data Dictionary form is shown here with the Electronic Leads table highlighted. Click **Edit** to see the list of fields in the table.



Part of the Electronic Leads table is shown in the illustration below. This table contains the data elements that can to be captured for import into CampusNexus Student.



Column Name	Type	Length	Caption (English)	Comment
AmElectronicLeadsID	int identity	10	Electronic Lead	Electronic Lead ID
SSN	char	11	Social Security Number	Student's social security
LastName	varchar	25	Last Name	Last Name.
FirstName	varchar	25	First Name	First Name
MI	char	1	Middle Initial	Street Address.
Addr	varchar	255	Address	Address
City	varchar	25	City	City.
State	varchar	2	State	State.
SyCountryID	int	10	Country	Country ID
Zip	char	10	Postal Code	Postal Code.
Phone	char	16	Phone Number	Phone Number.
WorkPhone	char	16	Work Phone	Work Phone
Sex	char	1	Sex	Sex
AmRaceID	int	10	Race	Race ID
AmTitleID	int	10	Title	Title ID
AmMaritalID	int	10	Marital Status	Marital Status ID
DOB	datetime	23	Birth Date	Birth Date.
Age	tinyint	3	Age	Age
AmCitizenID	int	10	Citizen	Citizen ID
email	varchar	50	E-mail	E-mail Address.

Processing Online Applicants

The application process in Portal leverages features of CampusNexus Student that help to identify possible duplicate records. CampusNexus Student enables institutions to process the potential duplicate students whose application information has accumulated in the AmOnlineApplicants table associated with Portal. The authorized user must decide if the prospective applicant is really a duplicate of a student on file, and if so, merge the data and use the student record on file.

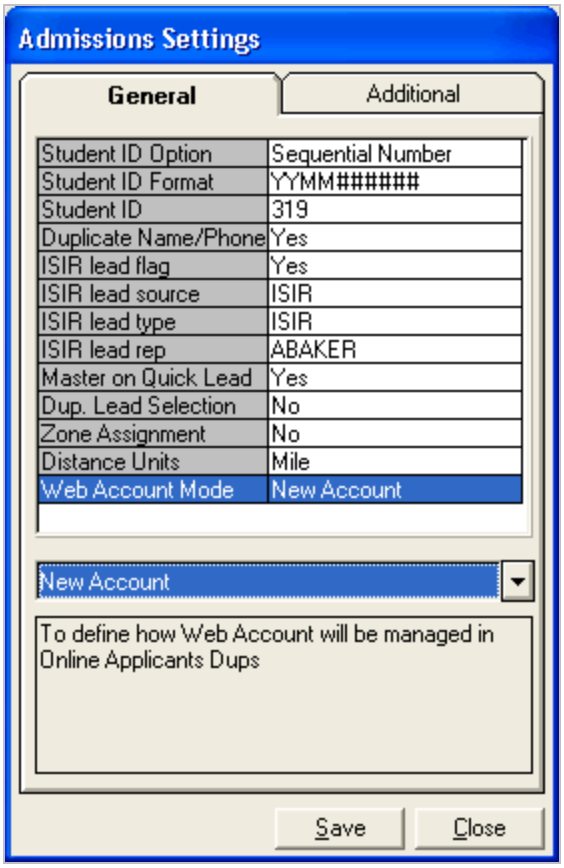
- If the prospective applicant is indeed a new student, the user must create a new student record accordingly.
- If the prospective applicant record is invalid, it can be deleted.

If the applicant is New or Existing, CampusNexus Student creates an Applicant or Enrollment record subsequently.

Note: This feature is enabled only if the institution uses Portal for online application. It is recommended that before enabling this feature, the campus process ALL duplicate records currently residing in the Process Online Applicants folder. All duplicates should be processed BEFORE disabling the feature.

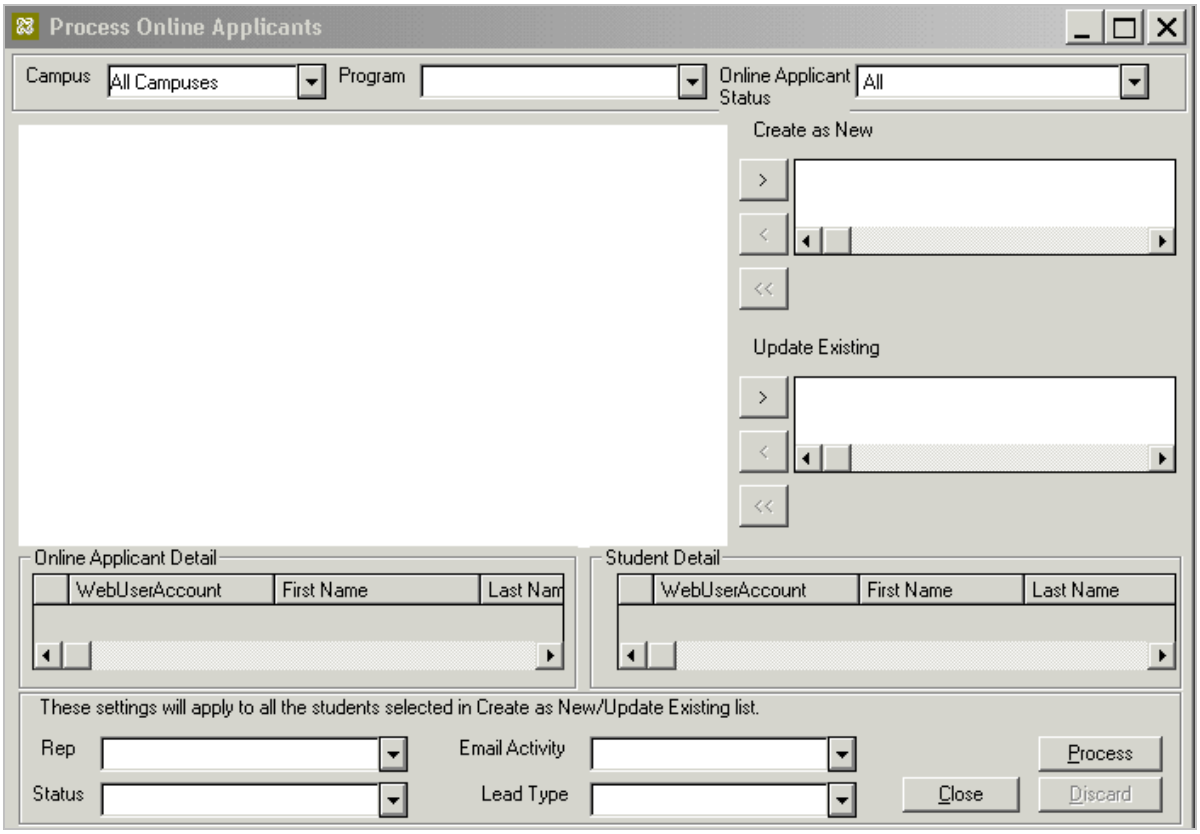
To view and resolve possible duplication in online applicants:

1. Navigate to **Setup > Admissions > General**. The Admissions Settings form is displayed. At the application level, the authorized user must indicate how Web accounts shall be managed. When there is a duplicate online applicant account, the administrator must indicate whether the institution will use the New Account, the Old Account, or allow Multiple Accounts. Select a mode and click **Save**.



Note: The Online Application Status History will be stored for duplicates and may be viewed via **View > Admissions > Status History**.

2. Navigate to **Daily > Admissions > Process Online Applicants**. The Process Online Applicants form is displayed.



Field functions are as follows:

- **Campus** - The drop-down list displays all campuses the user can access, and an All Campuses option. Select **All Campuses** to view all possible duplicate applicants. Actual processing must be done campus-by-campus.
- **Program** - The drop-down list displays all programs configured for the selected campus and an All Programs option.
- **Online Applicant Status** - Options in the drop-down list are "In Progress (Step 1)", up to, "In Progress (Step 8)", and final option of "Complete. These options correspond to values 1 through 8 (for Steps) and 999 (for Complete), of the ApplicationStatus column in WpUser table on the Portal database.
- **Student Display** - The main display area is a tree structure showing, at the first level, a list of Online Applicants (from the AmOnlineApplicant table). For each applicant, the system algorithm finds data when a node is clicked. For each possible duplicate student, enrollments for the student, if any, will be listed under the student.
- **Online Applicant Detail** - When you click on a student under an Applicant, the Online Applicant Detail area displays the applicant's details.

  When you click on an Enrollment under a Student, the Online Applicant Detail still displays, as does the Student Detail, with the addition of some detail fields in the Student Detail area which also display information for the enrollment.
- **Student Detail** - When you click on a student under an Applicant, the Online Applicant Detail area displays the applicant's details.

When you click on an Enrollment under a Student, the Online Applicant Detail still displays, as does the Student Detail, with the addition of some detail fields in the Student Detail area which also display information for the enrollment.

Processing

In the lower area of the form are four drop-down lists to choose options that apply when **Process** is clicked. The **Process** button becomes enabled when a student is moved into the New or Existing list. The user can assign an Admissions Rep, Email Activity, Status and Lead Type to an Applicant. These are required fields.

Note: As the label states on this area of the grid "These settings will apply to all the students selected in Create as New/Update Existing list".

Rep

This drop-down list displays all Admissions Reps associated with the campus chosen. Choose an Admissions Rep to assign to a new student record or applicant.

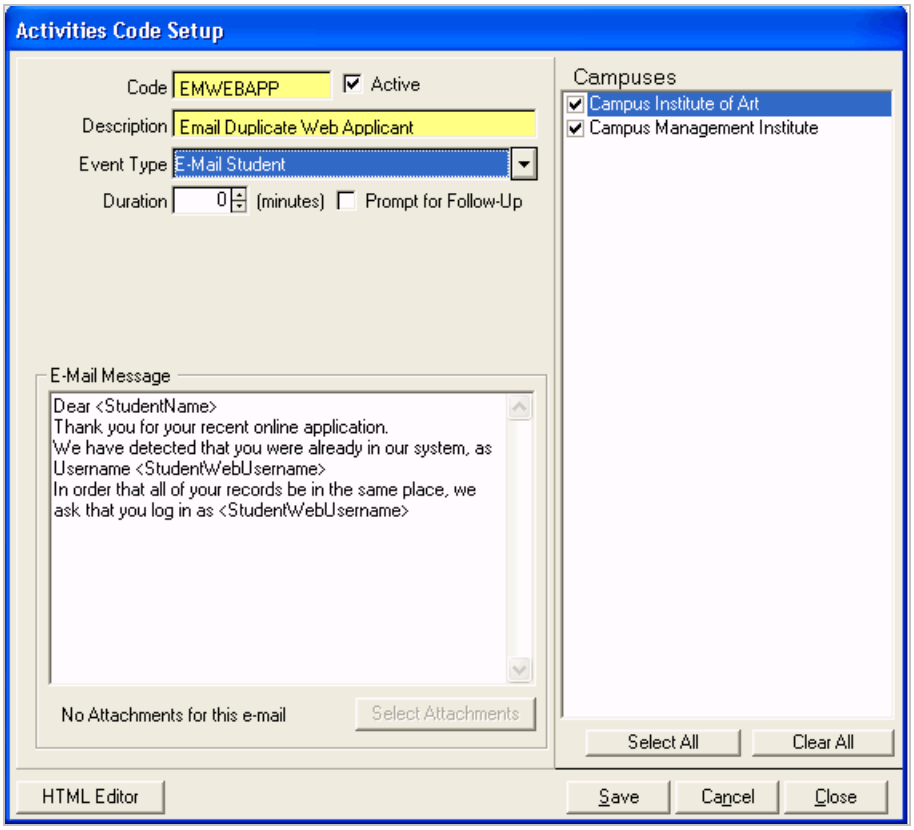
Note: When duplicate students are moved in 'Update Existing' and 'Do not update' is selected in the 'Rep' drop-down, then the Admissions Representative is not updated on the Student Master form as well as the Enrollment and Inquiry record. In addition if 'Do not update' is selected when a student is moved in 'Create as New' a popup box with a message stating: 'Do not update' option can only be selected for 'Update Existing' students.

Status

This drop-down list displays all statuses associated with the application process. Options are Interview Scheduled, Interviewed, New Lead, Application Accepted, Application Rejected, and Pending Applicant. Statuses are configured according to school-defined rules in the Status Code Setup form.

Email Activity

This drop-down list displays all Email Activities configured in Setup Contact Manager Lists (**Lists > Contact Manager > Activities > Add/Edit**) that are applicable to the Campus selected in the top Campus filter. The final step of online processing is the email sent to the student to confirm that his/her information was processed, and information regarding which web account (user name) to use in future transactions.



Lead Type

The Lead Type drop-down list displays all lead types configured in Setup Admissions Lists (**Lists > Admissions > Lead Type**). Lead types are not specific to a campus.

Process

Click the **Process** button after you have assigned an Admissions Rep, Status, Email Activity, and Lead Type and selected a Campus. (You must select a campus before you can move an applicant/student to the New or Existing list.) After processing is completed, the tree structure is refreshed. Processed applicants are no longer displayed in the tree structure. When processed successfully, they will have been removed from the online applicants database.

Note: When a duplicate application is processed, any previously recorded 'Ethnic Group' category information will be replaced with the new 'Ethnic Group' category information.

Discard

The **Discard** button becomes enabled only when the user selects an applicant.

If the user attempts to discard an applicant who has already made a payment, the system prompts the user to confirm this action.

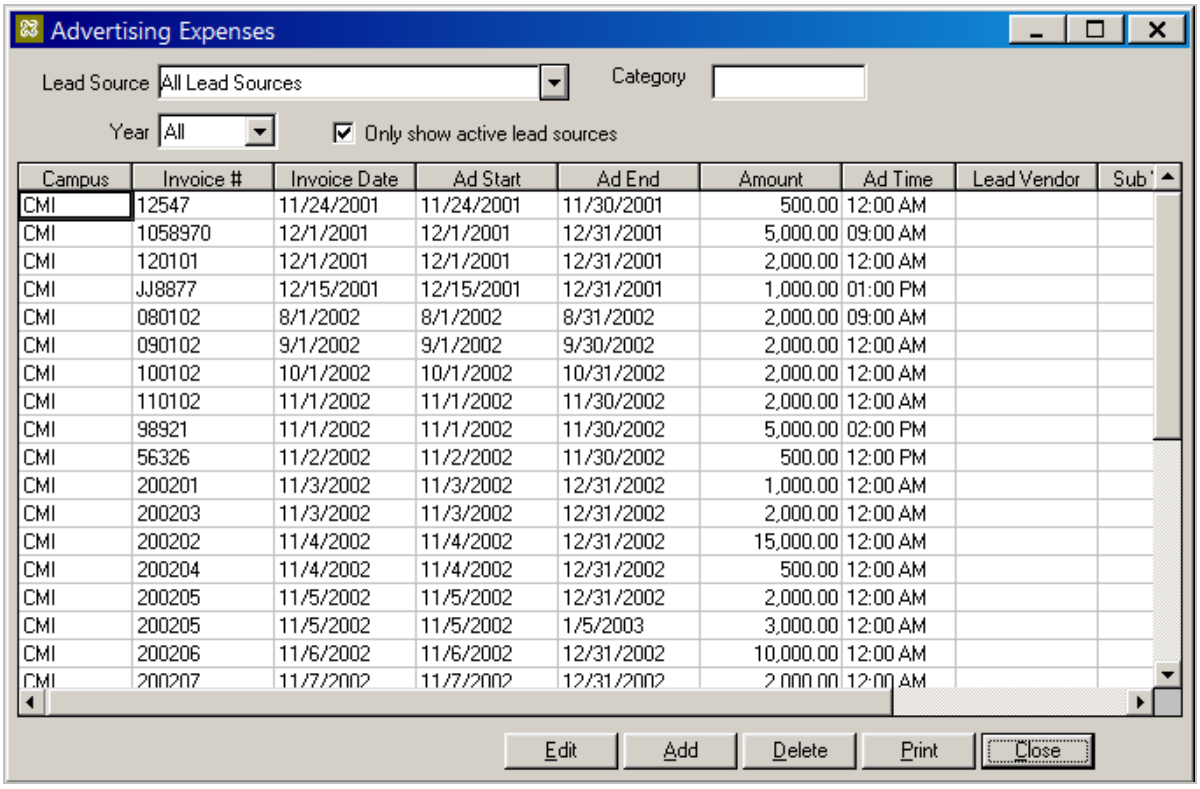
Note: In cases where records are still kept for auditing purposes, the user should perform a 'soft' delete.

If no payment had been made, then upon clicking **Discard**, the user is prompted for confirmation, and if confirms, the record is deleted from the table.

Enter Admissions Expenses

The expenses related to marketing, advertising and other efforts to recruit students can be recorded, tracked, and reported in CampusNexus Student. From the main menu, select the Daily Admissions Expenses option. The Advertising Expenses form is displayed. On this form, you can select the Lead Source and year for which to display a list of expenses. You can add a new expense, and edit or delete an existing expense. You can also print a report for the lead source and year that is active on the form.

The grid displays Campus, Invoice Number, Invoice Date, Ad Start Date, Ad End Date, Amount, and Ad Time (time that the ad occurs on radio or TV).



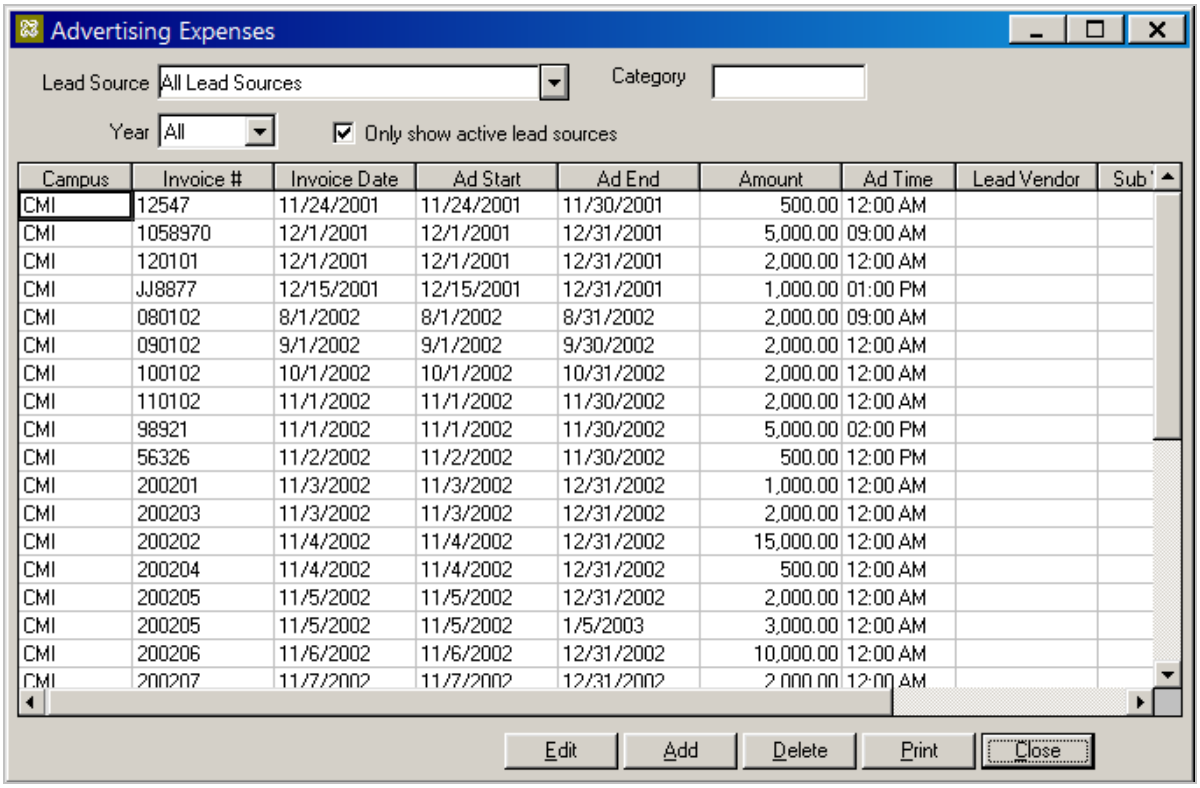
Campus	Invoice #	Invoice Date	Ad Start	Ad End	Amount	Ad Time	Lead Vendor	Sub
CMI	12547	11/24/2001	11/24/2001	11/30/2001	500.00	12:00 AM		
CMI	1058970	12/1/2001	12/1/2001	12/31/2001	5,000.00	09:00 AM		
CMI	120101	12/1/2001	12/1/2001	12/31/2001	2,000.00	12:00 AM		
CMI	JJ8877	12/15/2001	12/15/2001	12/31/2001	1,000.00	01:00 PM		
CMI	080102	8/1/2002	8/1/2002	8/31/2002	2,000.00	09:00 AM		
CMI	090102	9/1/2002	9/1/2002	9/30/2002	2,000.00	12:00 AM		
CMI	100102	10/1/2002	10/1/2002	10/31/2002	2,000.00	12:00 AM		
CMI	110102	11/1/2002	11/1/2002	11/30/2002	2,000.00	12:00 AM		
CMI	98921	11/1/2002	11/1/2002	11/30/2002	5,000.00	02:00 PM		
CMI	56326	11/2/2002	11/2/2002	11/30/2002	500.00	12:00 PM		
CMI	200201	11/3/2002	11/3/2002	12/31/2002	1,000.00	12:00 AM		
CMI	200203	11/3/2002	11/3/2002	12/31/2002	2,000.00	12:00 AM		
CMI	200202	11/4/2002	11/4/2002	12/31/2002	15,000.00	12:00 AM		
CMI	200204	11/4/2002	11/4/2002	12/31/2002	500.00	12:00 AM		
CMI	200205	11/5/2002	11/5/2002	12/31/2002	2,000.00	12:00 AM		
CMI	200205	11/5/2002	11/5/2002	1/5/2003	3,000.00	12:00 AM		
CMI	200206	11/6/2002	11/6/2002	12/31/2002	10,000.00	12:00 AM		
CMI	200207	11/7/2002	11/7/2002	12/31/2002	2,000.00	12:00 AM		

For additional information about Advertising Expenses, see Add Expense, Edit Expense, Delete Expense, and Print Expenses.

Add Expense

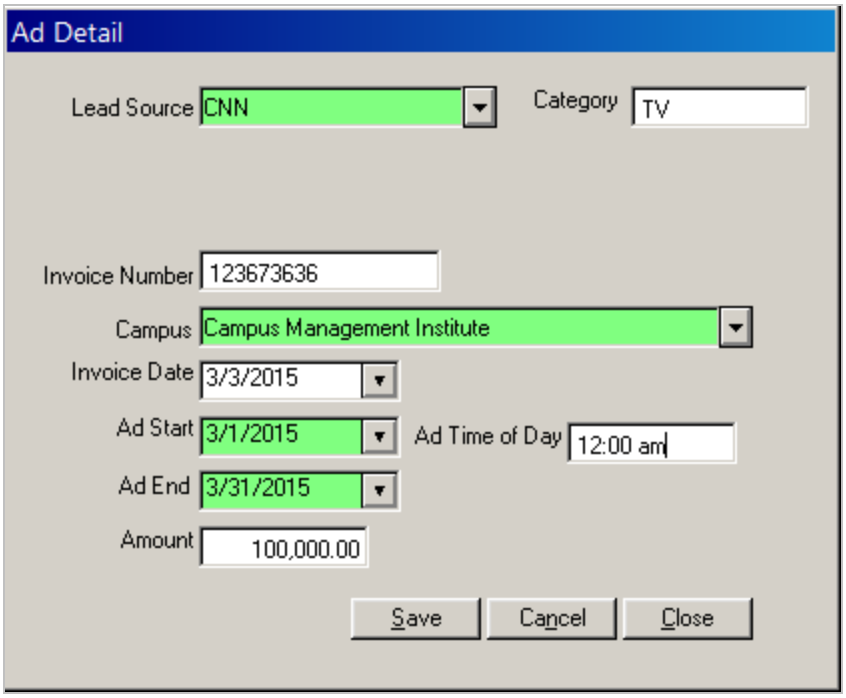
To add an expense in the Admissions module:

1. Navigate to **Daily > Admissions > Advertising Expenses**. The Advertising Expenses form is displayed.



2. Select the **Lead Source** and **Year** with which you want to work. If you like, you can select all years. A list of expenses that have already been recorded will appear. The Category code is displayed if you select a specific lead source.

3. Click **Add** to open a new expense form. You can also type the **Ctrl+N** key combination to open the new form. The lead source and current date will already be filled in.

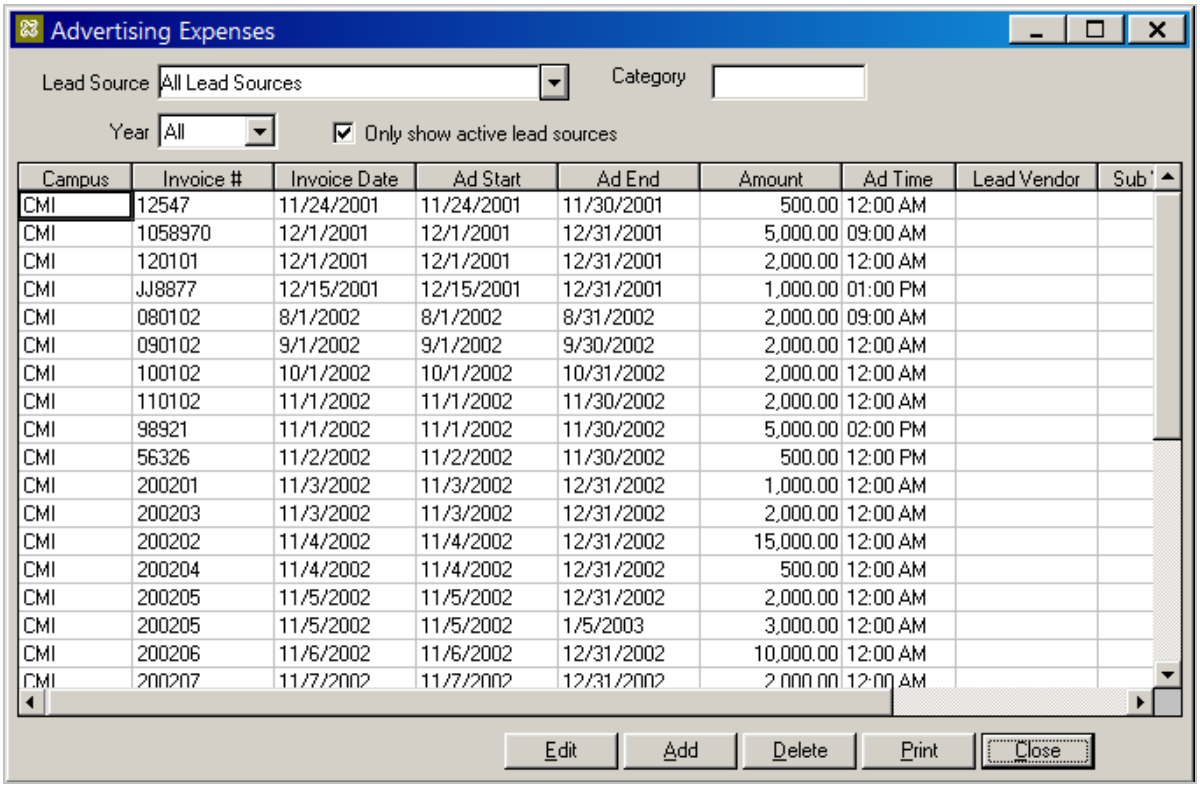


4. Complete the other data fields on the form. Lead Source and Campus are required fields.
5. Click **Save** or press **Ctrl+S** to save your entry and close the form.

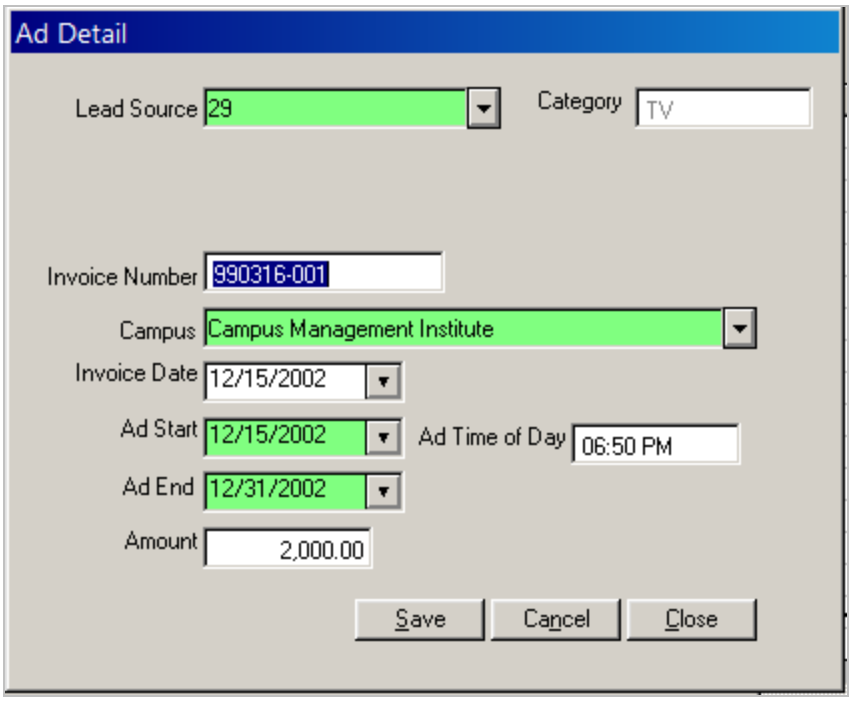
Edit Expenses

To edit an advertising expense in the Admissions module:

1. Navigate to **Daily > Admissions > Advertising Expenses**. The Advertising Expenses form is displayed.



2. Select the **Lead Source** and **Year** with which you want to work. If you like, you can select all years. A list of expenses will appear. Click (highlight) the invoice line you want to edit.
3. Click **Edit** to open the expense detail form.

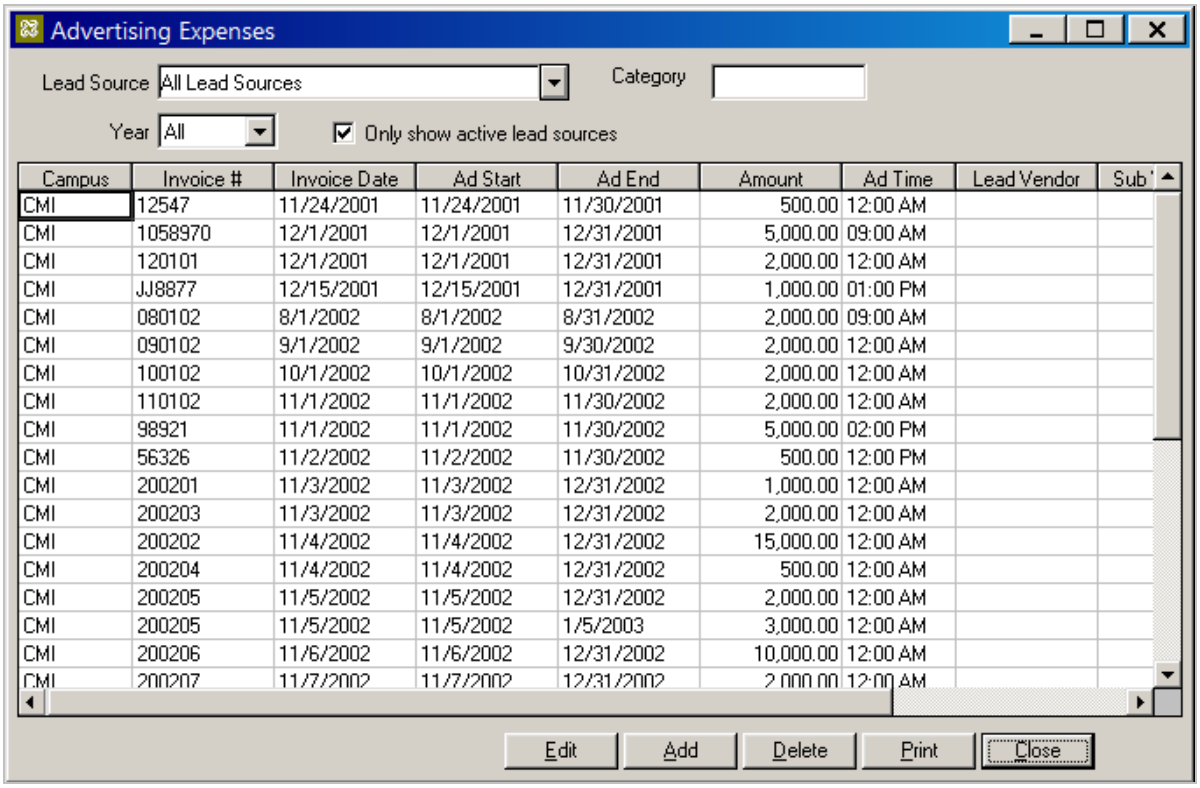


4. Edit the data fields on the form.
5. Click **Save** to save your entry and close the form.

Delete Expenses

To delete an advertising expense in the Admissions module:

1. Navigate to **Daily > Admissions > Advertising Expenses**. The Advertising Expenses form is displayed.

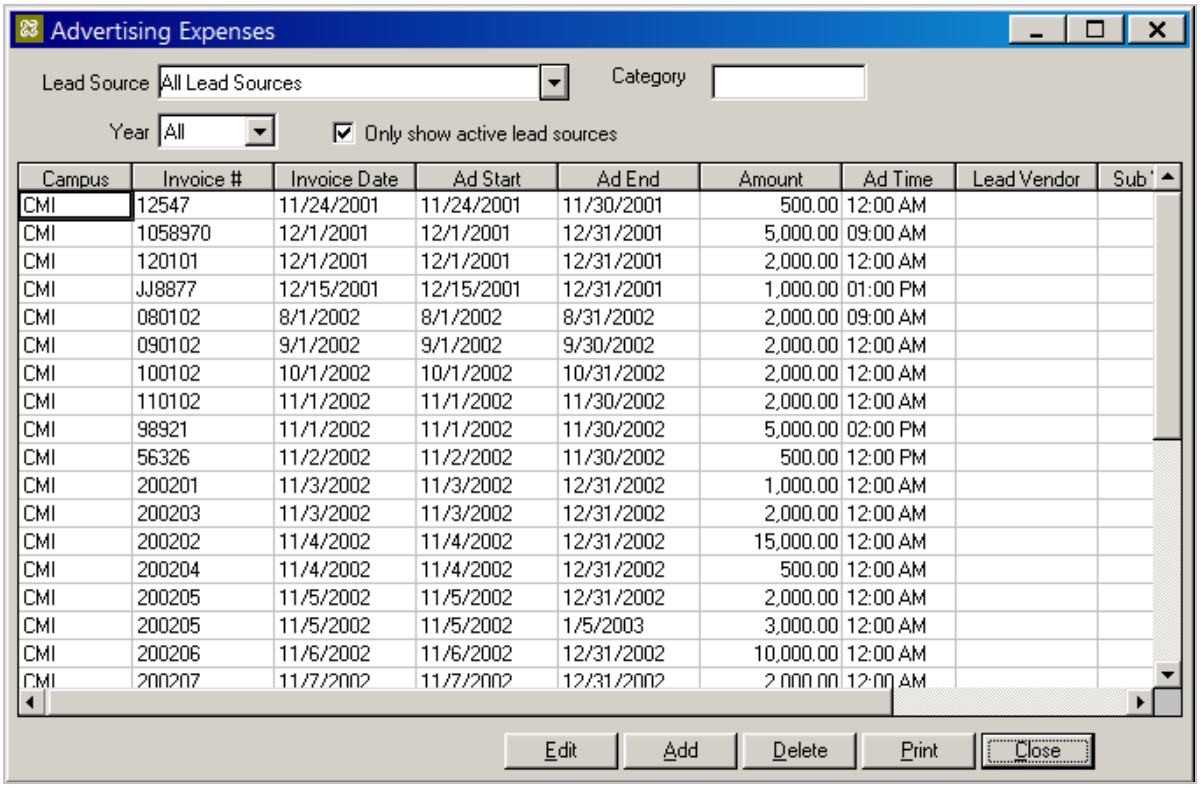


2. Select the **Lead Source** and **Year** with which you want to work. You can select all years. A list of expenses is displayed. Click the invoice line you want to delete.
3. Click **Delete**. A dialog box is displayed to confirm that you want to delete the selected invoice.
4. Click **Yes** to delete the invoice.

Print Expenses

To print advertising expenses for a selected lead source in the Admissions module:

1. Navigate to **Daily > Admissions > Advertising Expenses**. The Advertising Expenses form is displayed.



2. Select the **Lead Source** and **Year** that you want to print. You can select all years. A list of expenses is displayed.
3. Click **Print** to send the expense list to your printer.

   A more useful report can be obtained at Reports > Admissions > Lead Source Performance.

Document Tracking

Institutions request documents from students and persons or organizations connected with the student. Use Document Tracking to keep track of the documents that are necessary for processing student records in an orderly fashion.

Document Tracking is available in the following modules:

- Admissions - AM
- Financial Aid - FA
- Student Accounts - SA
- Academic Records - AD
- Loan Management - LM
- Career Services - PL

You can use the Daily > Document Tracking feature to look at all documents of a certain type to determine the document's status for each student.

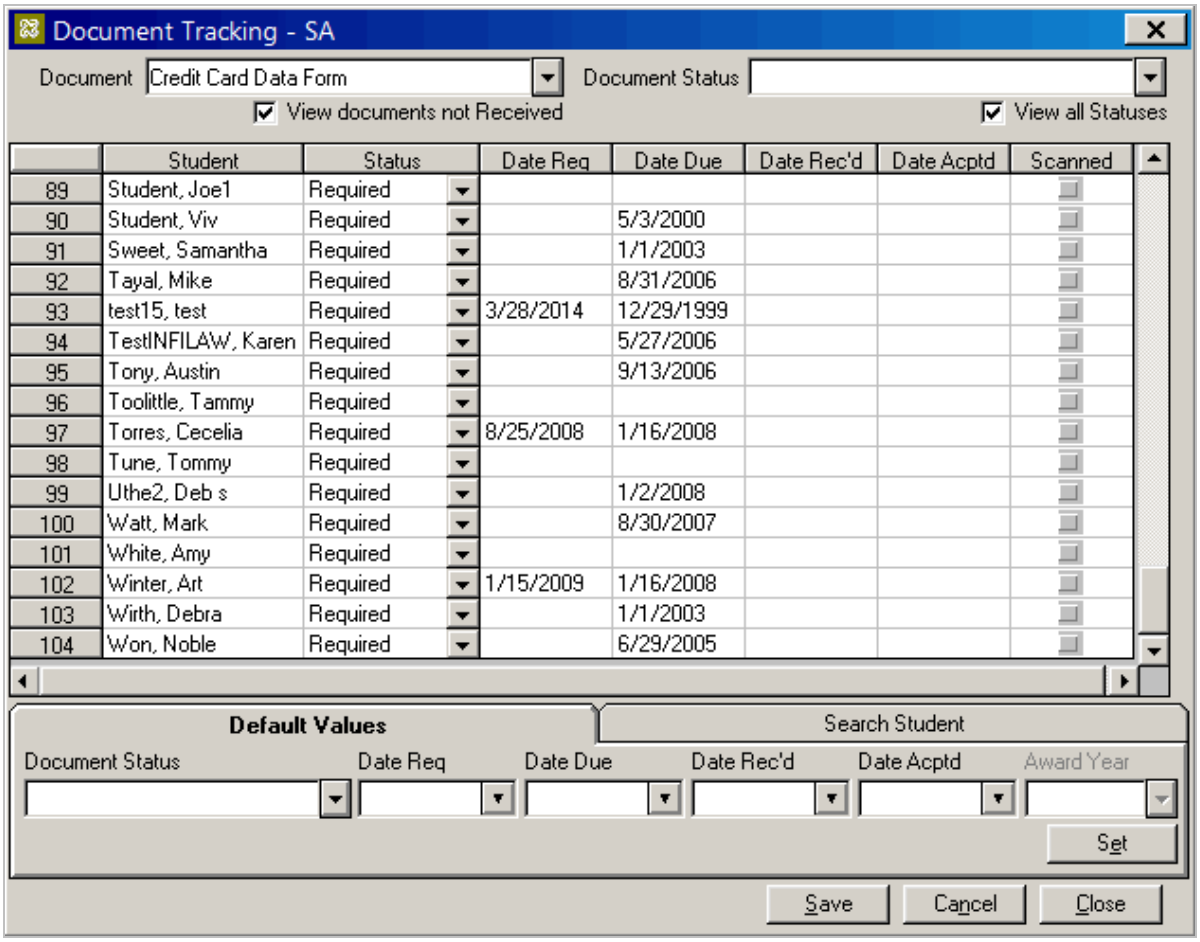
Several documents relate to academic or demographic history and your organization must have copies of them for each student. Examples are birth certificates, driver's licenses, transcripts, alien registration cards, social security cards, etc. Management policy determines which documents are important at your institution.

You can set up lists of these documents and assign them to each student record. You can then record the current status of the documents, the date you requested each document, and the date you received each document. You can also indicate that the document has been scanned into your electronic filing system.

Note: This approach differs from the Document Tracking option that you can access from the View > Contact Manager menu or Student Bar. When you access Document Tracking from the Student Bar, all documents related to a specific student as displayed. Here, you see all students related to a given document.

To edit tracking data for listed documents:

1. Navigate to **Daily > Admissions** (or other module) **> Document Tracking**. The Document Tracking form is displayed.



2. Select a **Document** from the list box at the top of the form. All students having the selected document related to their files are listed on the form.
3. Select or clear **View Documents Not Received**.
   - If the check box is selected, only those documents that have not been received are listed.
   - If the check box is cleared (default), all documents (subject to your Document Status selection) are listed.
4. For Document Tracking in Financial Aid - FA, select an **Award Year** to which the documents apply.

   Note: If you choose a Financial Aid document that does not have the "Award Year Specific" flag selected (indicating Yes) on the Document Setup, the form is displayed with the three Award Year fields disabled.
5. Select or clear **View All Statuses**.
6. Select an optional **Document Status**. If you select a document status, CampusNexus Student lists only the type of document you selected and only those that have the selected status.
7. From the displayed list, find a student document.
8. Click on a field in the row you want to update. You can update the following fields:
   - Status
   - Date Requested
   - Date Received
   - Date Due

- Date Accepted
- Scanned

Note: In date fields, you must enter the century along with the year. For example, 06/30/2000. If you just enter 99 instead of 1999, CampusNexus Student will reject it.

9. Click **Scanned**, if necessary, to indicate that you have scanned the requested document into your electronic filing system.
10. The **Default Values tab** enables you to update statuses and dates in batches.

    If you select a Status, or a Date Due, or Award year, for example, CampusNexus Student updates the values of all students whose names appear in the grid. Click **Set** to update the values and save your work.
11. The **Search Student tab** enables you to search a student using the Social Security Number (SSN) or Student ID.

    Type the SSN or ID and click **Filter**. CampusNexus Student finds the student associated with that number and displays only that student's name and information in the grid. Click **Clear Filter** to remove the filter. The grid revert to the previous display of students.
12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Enrolling a Student

The student enrollment process starts in the Admissions department. The Admissions Rep records the student's enrollment and passes the student on to the Academic Records department. From the time the enrollment is recorded, the Admissions department no longer controls the student's progress through the system. Admissions can continue to view the student's data but can no longer change the student's school status or other critical data elements.

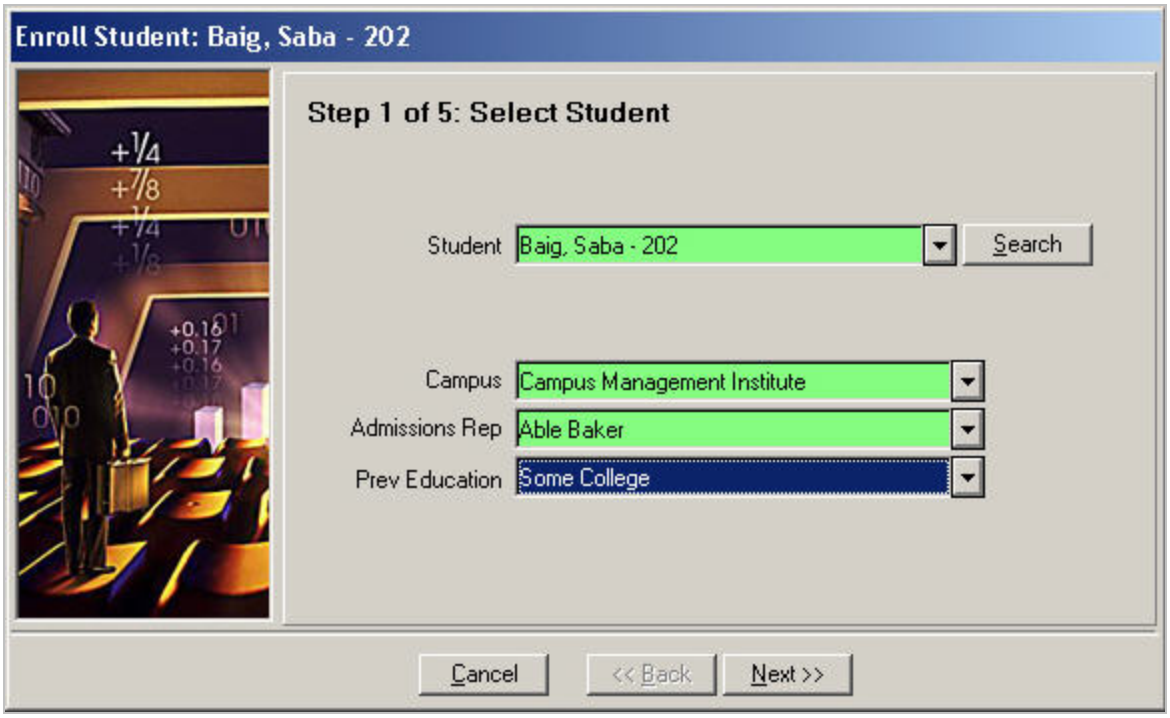
When you enroll a student, CampusNexus Student updates the Student Master record with the Program, Start Date, and Shift and copies the required and elective course list for the program version to the student's course schedule. All courses are set up with a status of Future. The fields in the Student Academic Years record - Weeks Enrolled in Academic Year and Credits/Hours in Academic Year - are set to the default values for the academic year.

Note:The number of steps necessary to enroll a student depends on the options chosen by your institution. For instance, the Advisor or Post-Enrollment Functions steps may not be used. Therefore, the numbering of the steps on the enrollment wizard form may vary. The procedure below describes the following steps:

1. Select Student
2. Select Program
3. Select Term & Billing
4. Enter Enrollment Dates
5. Select Advisors
6. Description & Comments
7. Post-Enrollment Functions

To enroll a student who has completed the Admissions process:

1. Navigate to **Daily** > **Admissions** > **Enroll Student**. Step 1 of 7: Select Student of the Enroll Student wizard is displayed.

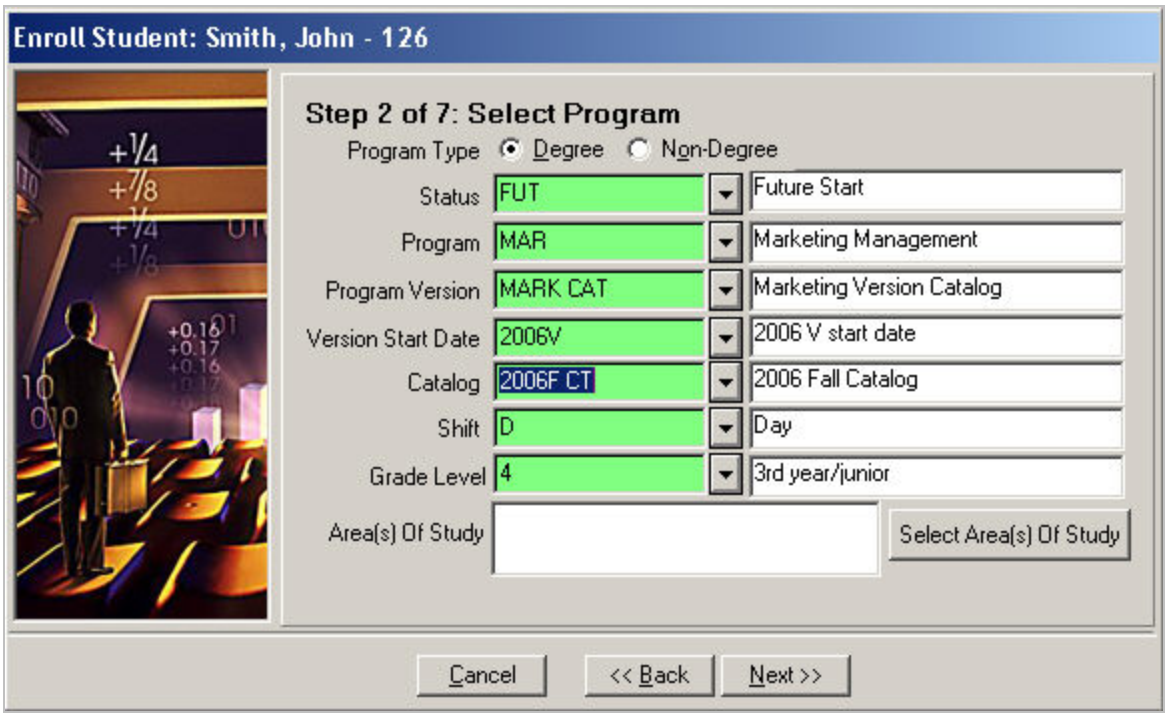


2. Select the **Student** to be enrolled or click **Search** to find the student.

After the student is selected, CampusNexus Student verifies that all required fields are populated before you can proceed to the next page. A message is displayed if data is missing for required fields.

CampusNexus Student fills in the **Campus**, **Admissions Rep**, and **Prev Education** fields. If you have appropriate permissions, you can modify these fields.

3. Click **Next**. Step 2 of 7: Select Program of the Enroll Student wizard is displayed.



4. If the campus at which the student is enrolling provides non-degree programs (NDS), a Program Type option is displayed above the Status field. Select **Degree** or **Non-Degree**. See also Tracking NDS students. If the campus does not allow NDS enrollments, CampusNexus Student automatically selects Degree.

   The lists of the Status and Program Version fields are filtered based on the Program Type selection.

   For Degree programs:

   - The Status list remains the same as in prior versions of CampusNexus Student. The Program field lists the school-defined status codes in category "E-Enrollment".
   - The Program Version field lists only Degree program versions.

   For Non-Degree programs:

   - The Status list shows only the NDS-Enrollment school-defined status codes. SyStatus.Category = "X".
   - The Program Version list shows only Non-Degree program versions.

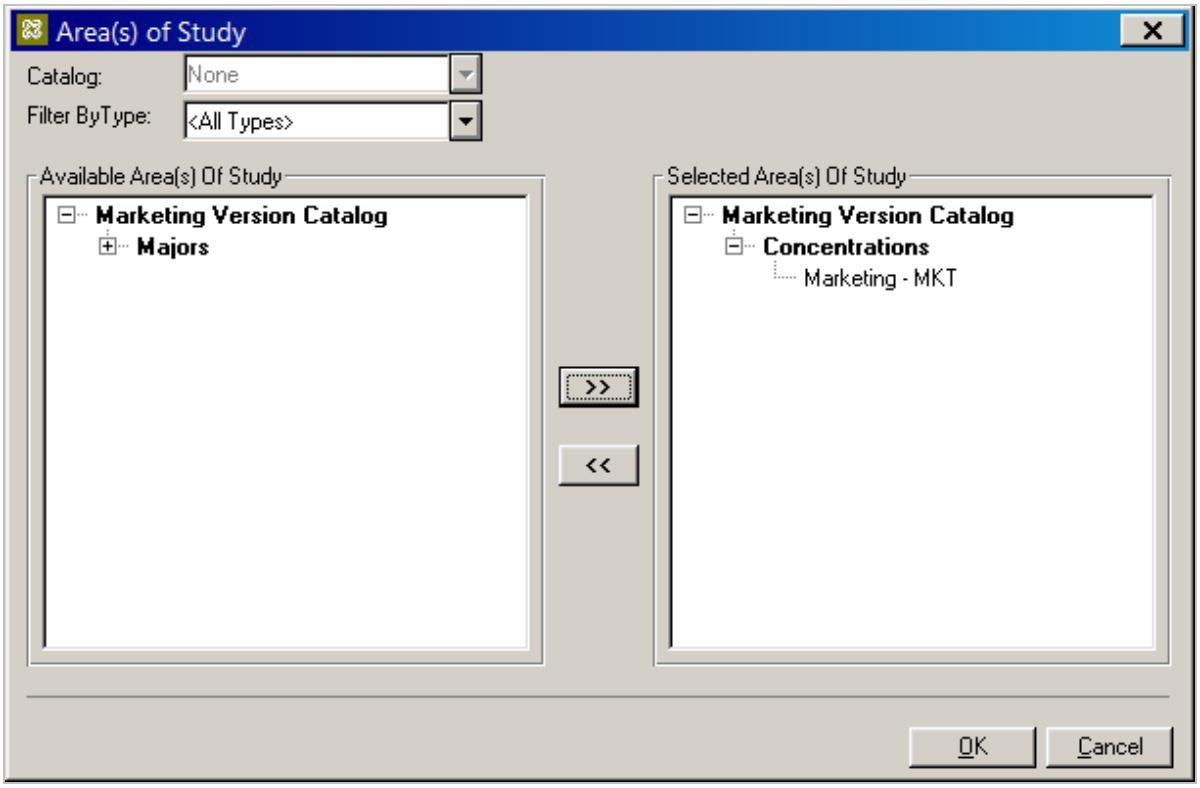
5. The **Program** field defaults to the program on the Student Master form. If you select a Program, the Program Version field will list the versions for the selected program. If there is only one program version, it will be selected automatically.

6. If the **Program Version** was setup under a Catalog, the Catalog associated with the Program Version is displayed, otherwise the value None is displayed in the Catalog field.

7. Specify the **Version Start Date** of the program version for the campus that the student is enrolling in.
8. The **Grade Level** drop-down list contains grade levels that are established by the Department of Education.

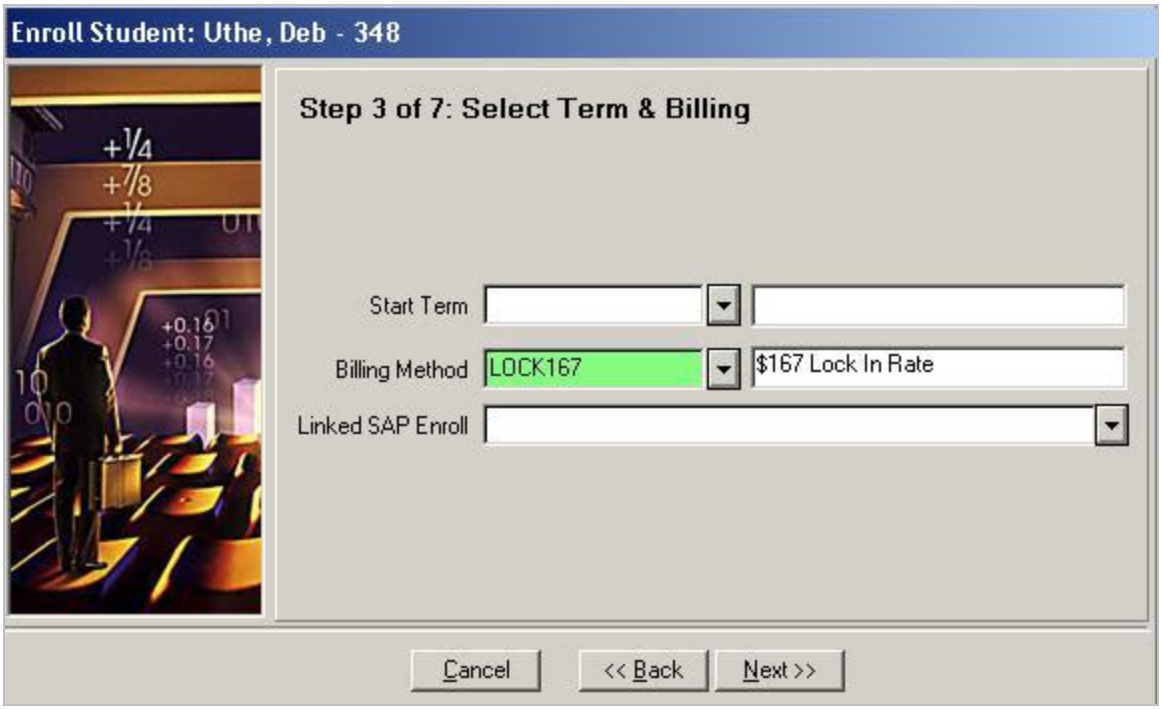
   Note: If the Grade Level is assigned as '1st time, never attended college', CampusNexus Student automatically considers the student as a First Time Borrower if the student has an ISIR or FAFSA for the same award year during the enrollment process. You can disable the First Time Borrower flag after the student is enrolled during the financial aid packaging process.
9. Click **Select Area(s) Of Study** to select components for the student's course of study. The available Areas of Study are displayed.

   Note: This button is used to associate a Major, Minor, and Concentration to the student's degree. The list of available Areas of Study will be filtered based on the Program Version selected in this step of the wizard.



   a. Select a **Catalog** (if applicable) and filter the Areas of Study by **Type** (if necessary).
   b. Click **+** to expand the folders in the Available Area(s) Of Study field.
   c. Click **>>** to select an Area of Study.
   d. Click **OK**.

   The selected Area of Study is added to the enrollment form.
10. If applicable, in the **Transfer credits to be used in academic year dates** field, specify the number of credits to be transferred. The total credits for the program that the student is being enrolled into will be reduced by the number of transfer credits.
11. If applicable, select **Transfer Student (for IPEDS reporting)** to designate that the transfer type is not to affect a student's transfer status in IPEDS reporting.
12. Click **Next**. Step 3 of 7: Select Term & Billing of the Enroll Student wizard is displayed.



13. Select the **Start Term**. The term list is set up under Lists > Academic > Records > Terms.

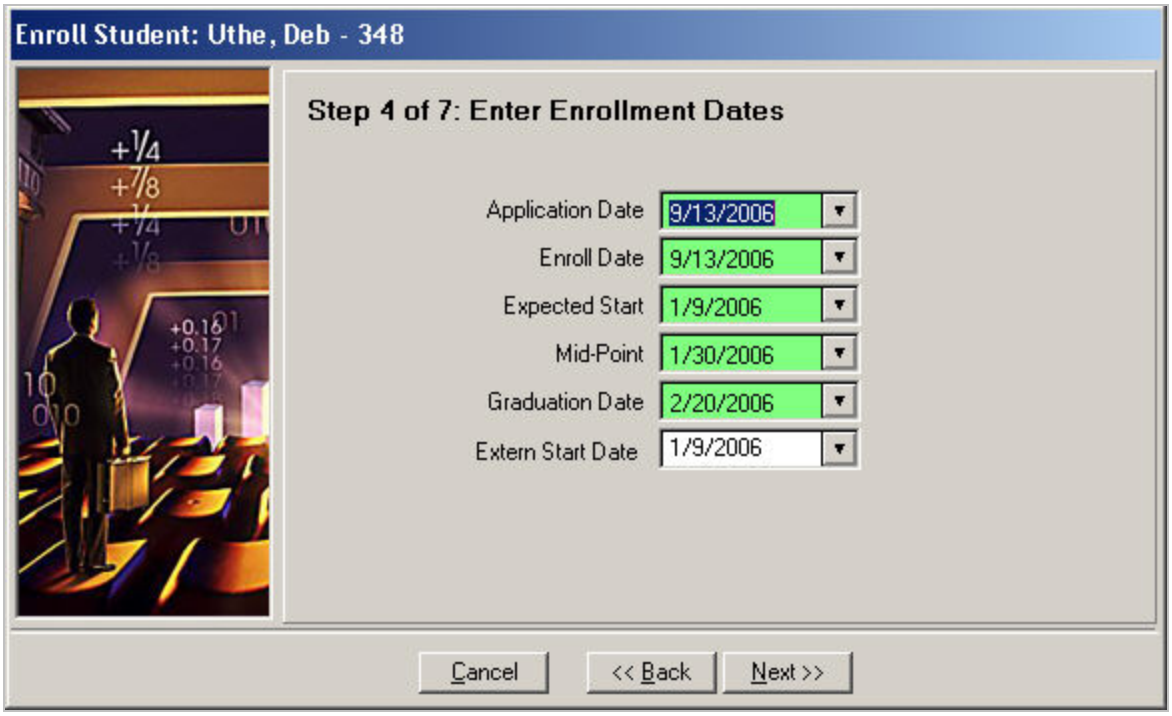
    If you did not select a start date on the previous page of the wizard, the term start date will be used as the student's start date for the enrollment.

14. Select the **Billing Method**. The billing methods are set up under Lists > Student Accounts > Billing Methods. The system defaults to the billing method for the student's primary Billing Affiliate.

15. Select any previous permanent out enrollment from the **Linked SAP Enroll** list to be linked with this new enrollment.

    Note: This field is displayed only if the system configuration for **SAP Enrollment Linking?** is set to Yes in Setup > Academic Records > Settings.

16. Click **Next**. Step 4 of 7: Enter Enrollment Dates of the Enroll Student wizard is displayed.

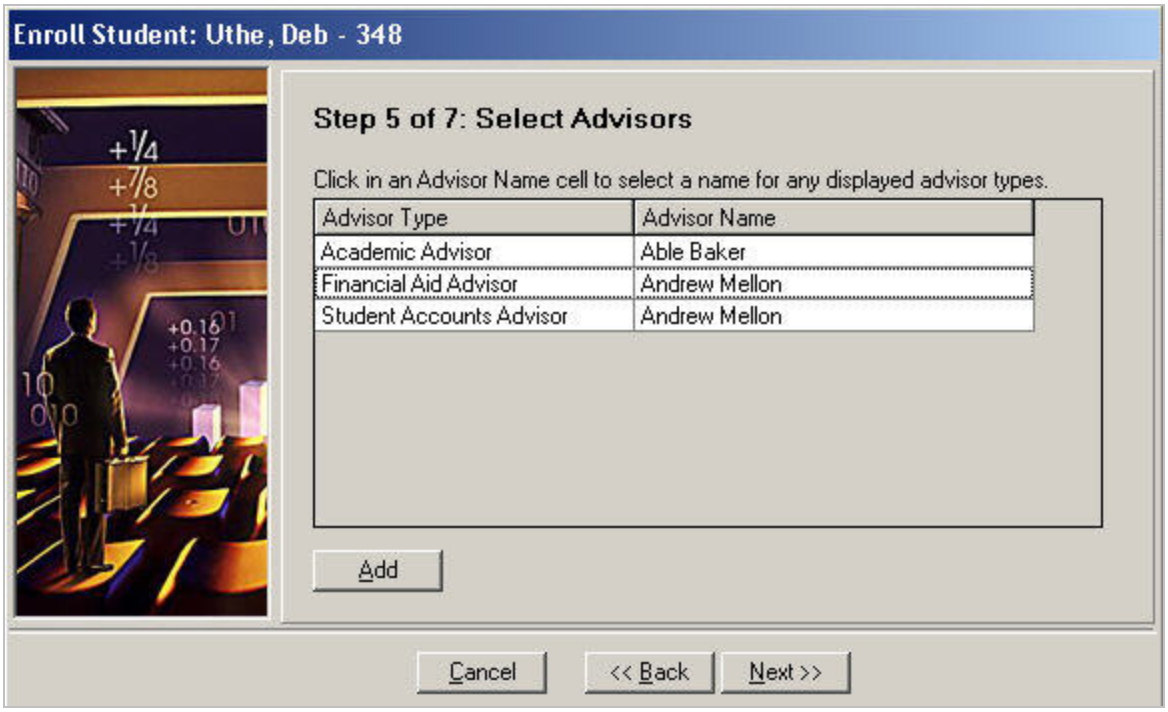


17. Enter appropriate dates for **Application Date**, **Enroll Date**, **Expected Start**, **Midpoint**, **Graduation**, and **Extern Start Date**. CampusNexus Student fills in these dates from the program version setup. You can change these dates only if they are set up to be modifiable.

    If the Program Version is set up to require an Extern Start Date, the field is required. Otherwise, it is optional.

    Note: The Expected Start date is displayed in Orig Exp Start Date of the Enrollment form under the Date/Status tab, once the student has been enrolled.

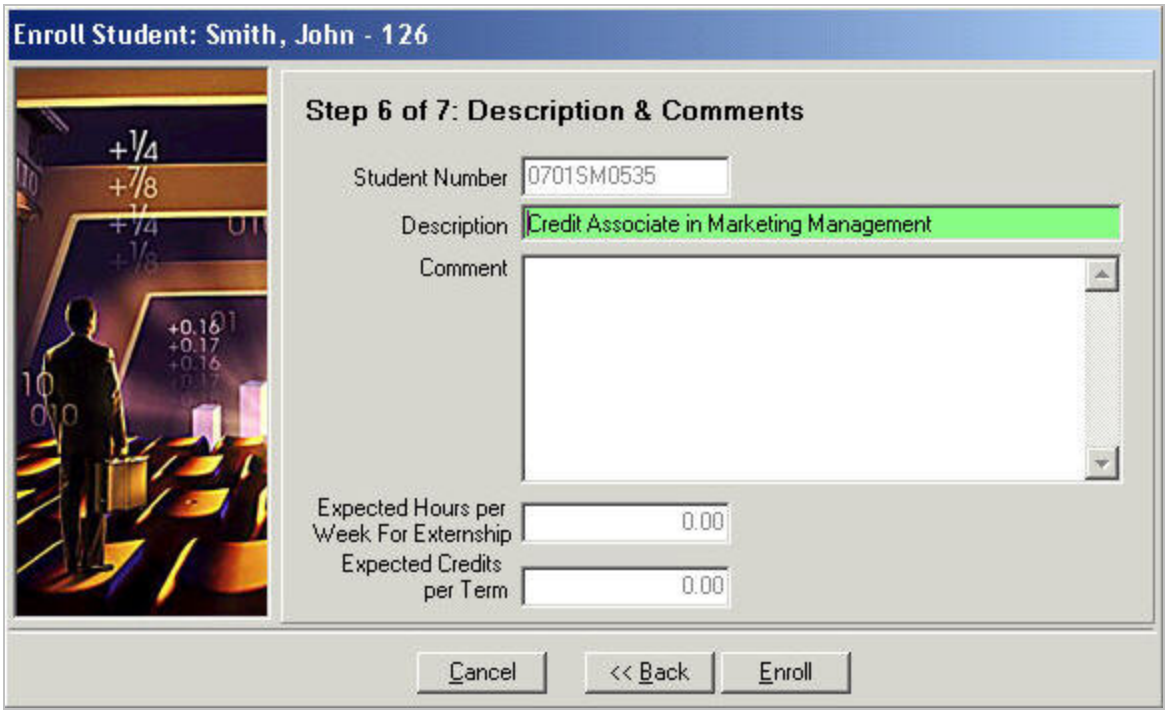
18. Click **Next**. Step 5 of 7: Select Advisors of the Enroll Student wizard is displayed.



19. Select the **Advisor Name** for each **Advisor Type** on the list.

    If necessary, click **Add** to add additional Advisor Types to the grid. On the Add New Advisor form, select the **Advisor Type** and **Advisor Name**, and click **Save**.

20. Click **Next**. Step 6 of 7: Description & Comments of the Enroll Student wizard is displayed.



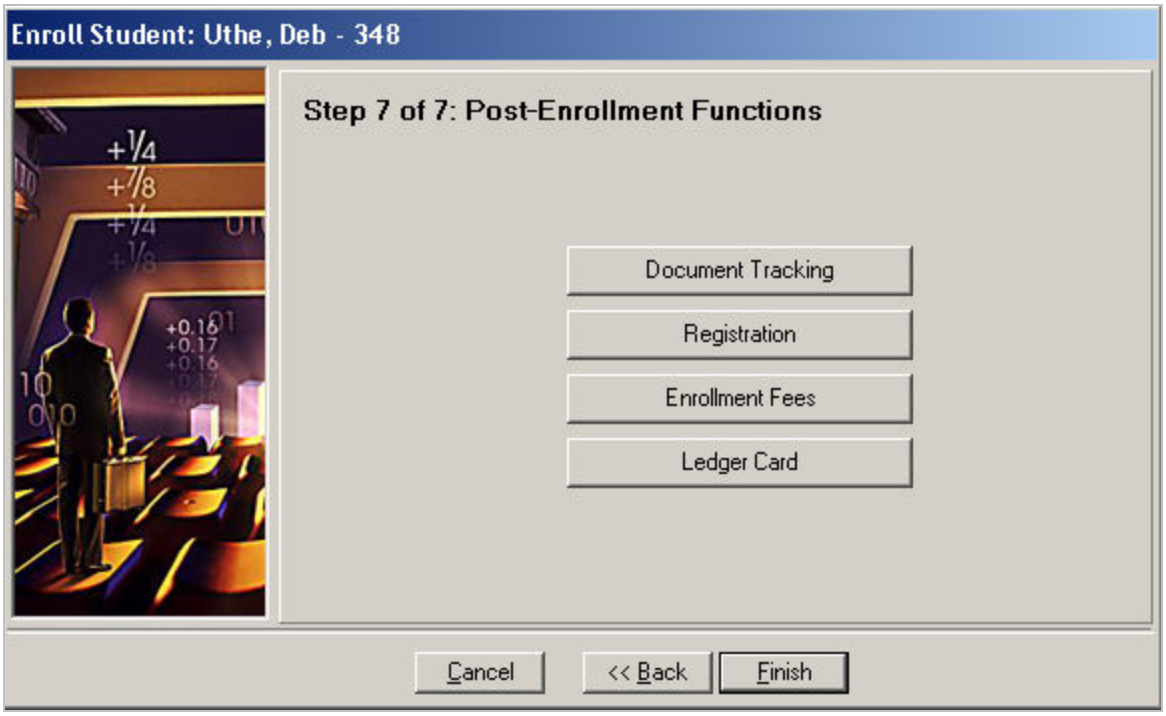
The **Student Number** field displays the student's ID. The **Description** field displays the program selected in Step 2.

The values displayed in Expected Hours per Week For Externship and Expected Credits per Term are assigned when setting up a program version or during individual student enrollment.

21. Enter any **Comments** about this enrollment.
22. Click **Enroll** to complete the enrollment.

    CampusNexus Student displays an confirmation message when the enrollment is successful.

    If entrance tests are attached to the program version in which the student is being enrolled, those entrance tests will be attached to the student's enrollment record. When the enrollment wizard is completed and the user adds the enrollment, CampusNexus Student populates the Prospect Test table with any rows that exist in the Test by Program Version table for the program version in which the student was enrolled.
23. Click **OK**. Step 7 of 7: Post-Enrollment Functions of the Enroll Student wizard is displayed.



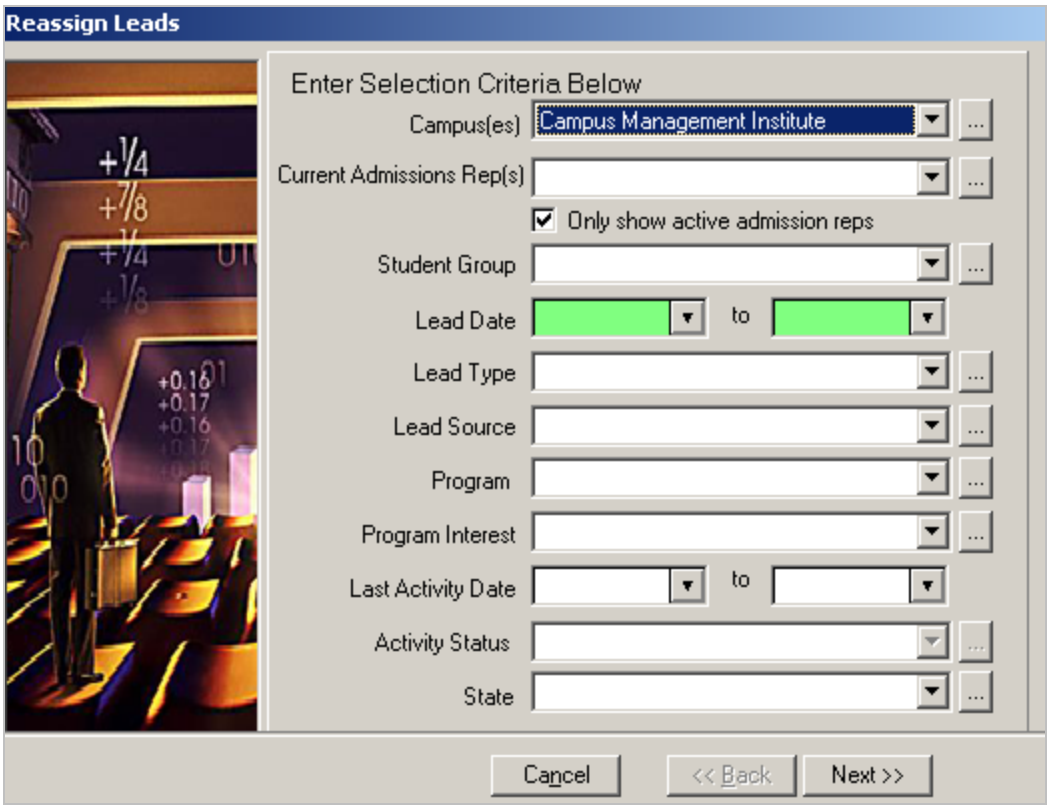
24. If your institution requires the person enrolling a student to review certain forms immediately after enrollment, CampusNexus Student display options to review the forms and perform the necessary actions. This form checks the setup flags for *Academic Records* (Enrollment). After enrolling, the items selected on the Academic Records Enrollment Settings form are displayed. You cannot exit the enrollment wizard until you have gone through the required forms. This procedure does not require you to edit anything on the forms, but it will display the data for your review. These items could include Document Tracking, Registration, Enrollment Fees, Auto Charge Transactions and Ledger Card.
25. After the forms are processed, click **Finish** to complete the enrollment process.

Reassign Leads

Sometimes, you may want to reassign leads to one or more different Admissions Representatives. The Reassign Leads wizard provides an efficient method for reassigning these leads to single or multiple Admissions Representatives, and to different, multiple campuses, depending on the needs of your institution.

To reassign leads to one or more new admissions representatives:

1. Navigate to **Daily** > **Admissions** > **Reassign Leads**. The Reassign Leads wizard is displayed.



2. Select one or more campuses from the **Campus** field. The list will display all campuses you can access.

   Note: If you do select to reassign leads to more than one campus, you will later only be able to select admissions reps, student groups, and lead sources shared by all selected campuses.

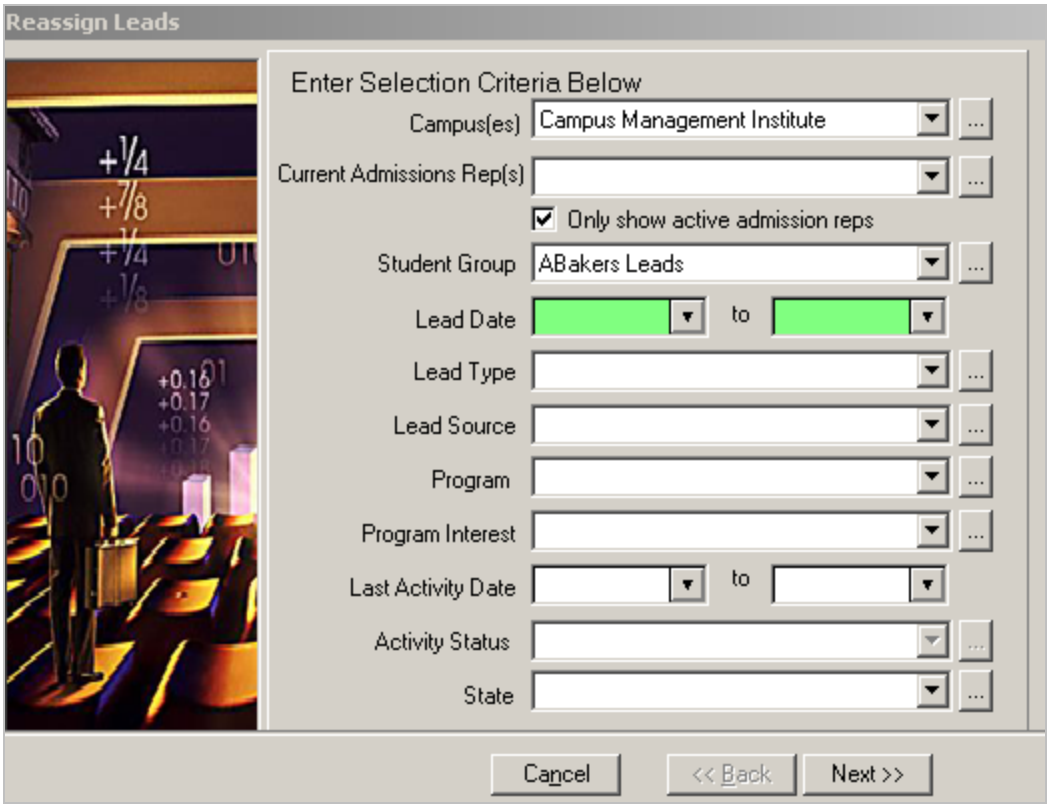
3. Select the **Current Admissions Rep(s)** from whom the leads are to be reassigned.

   - If **Only Show Active Admissions Reps** is selected, only **Active** current admissions reps are displayed in the drop-down list.
   - If **Only Show Active Admissions Reps** is not selected, the drop-down list displays **Active** and **Inactive** admissions representatives.

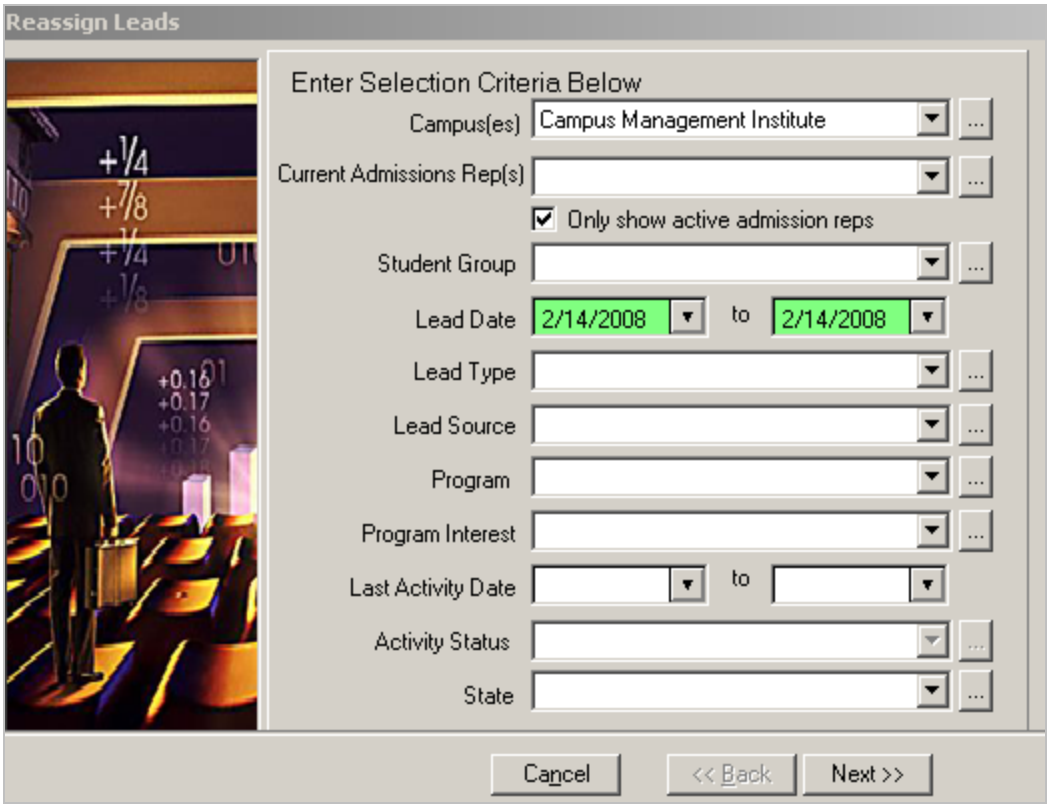
   Check or clear the check box accordingly.

4. Select a **Student Group** to reassign the lead. No other selection criteria are required to continue processing. You may, however, use the other selection criteria on the screen on an optional basis. If you do not need to use additional selection criteria, click the **Next** button and proceed to **Step 13.** Otherwise, continue making choices on this

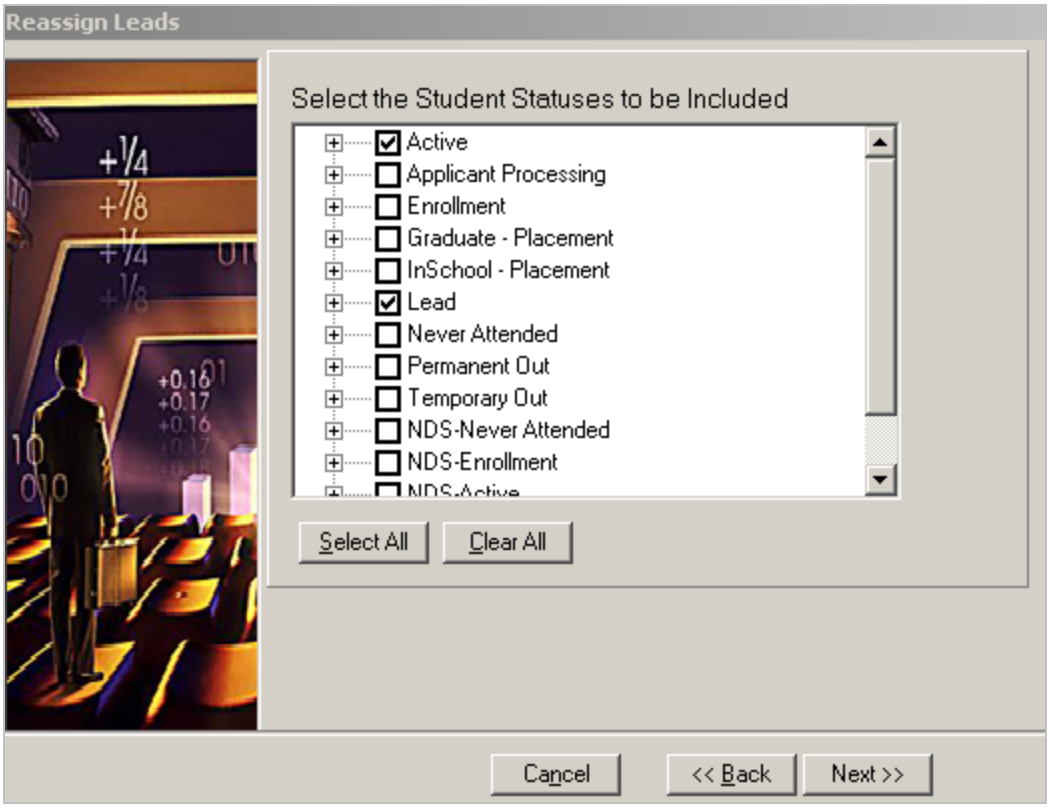
screen.



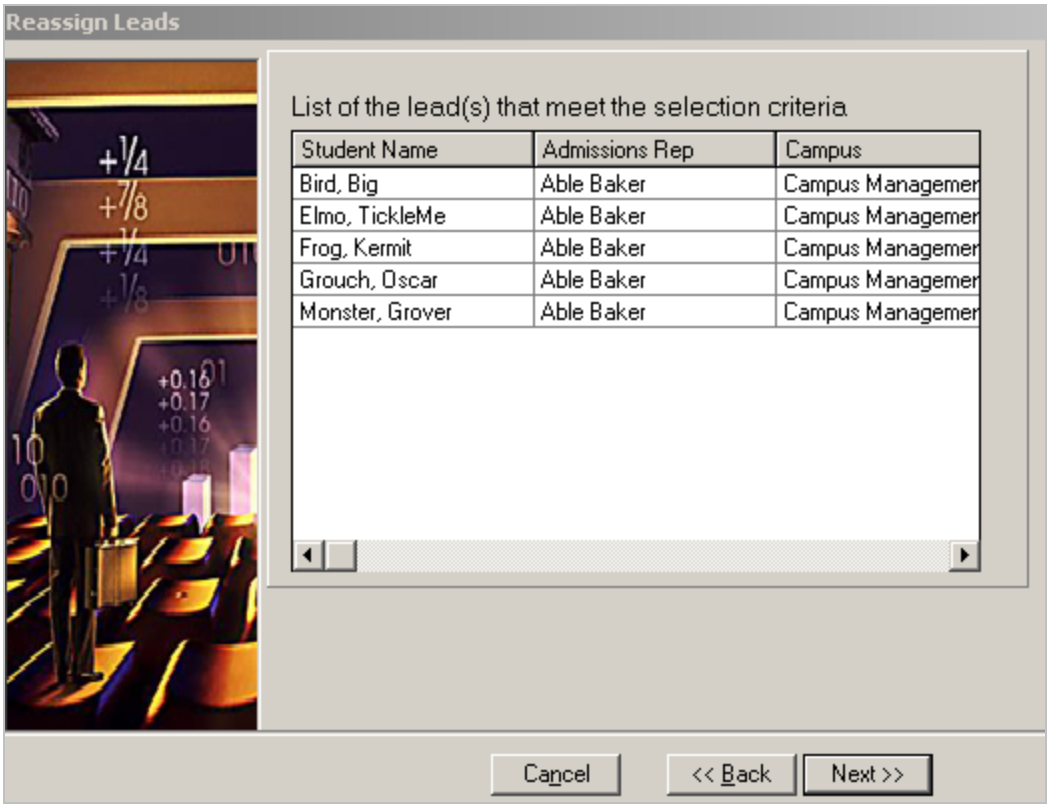
5. If you have selected a **Student Group**, the **Lead Date** is not a required field. If you have not selected a Student Group, or if you want to select only leads within a specific range of dates, enter or select the Lead Date range. The End Date of the date range is permitted to be the same date as the Begin Date, if necessary.



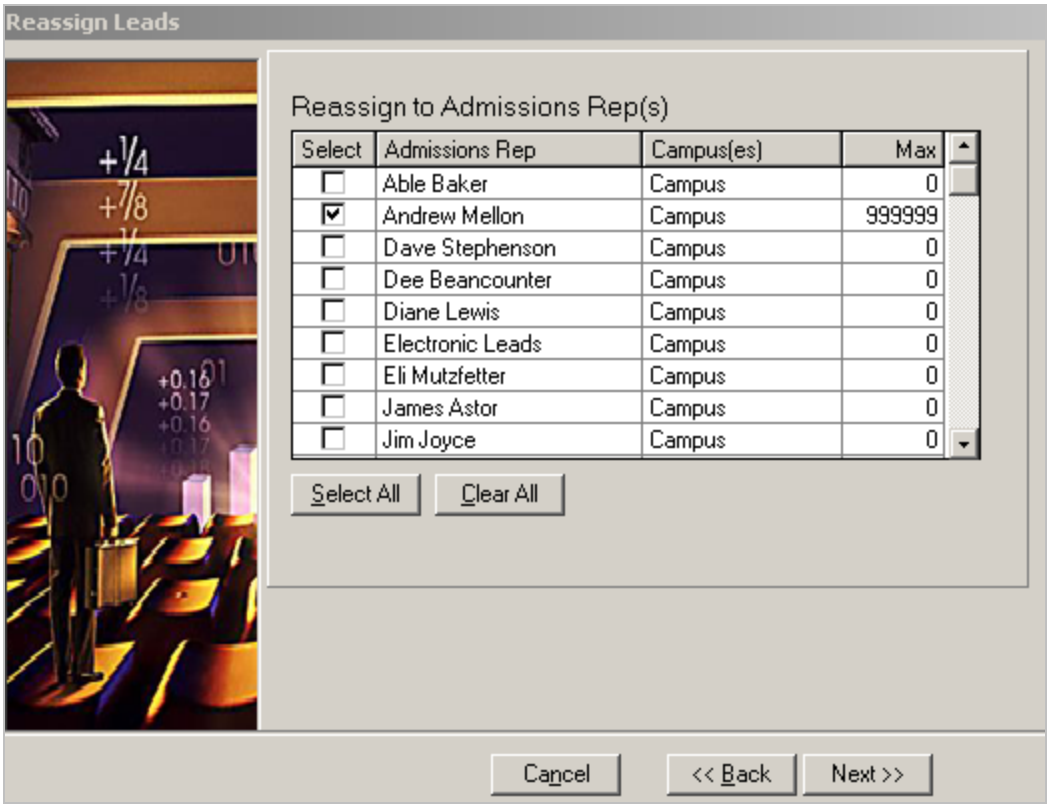
6. Select a **Lead Type** to be reassigned. If you leave **Lead Type** blank, *all* lead types will be reassigned.
7. Select a **Lead Source** to be reassigned. If you leave **Lead Source** blank, *all* lead sources will be reassigned.
8. Select a **Program** to be reassigned. If you leave **Program** blank, *all* programs will be reassigned.
9. Select a **Program Interest** to be reassigned.If you leave **Program Interest** blank, all program interests will be reassigned.
10. Enter or select the **Last Activity Date** range.
11. Select an **Activity Status** from the drop-down list.
12. Select a **State** from the drop-down list. If you leave **State** blank, all states will be reassigned.
13. Click **Next**.



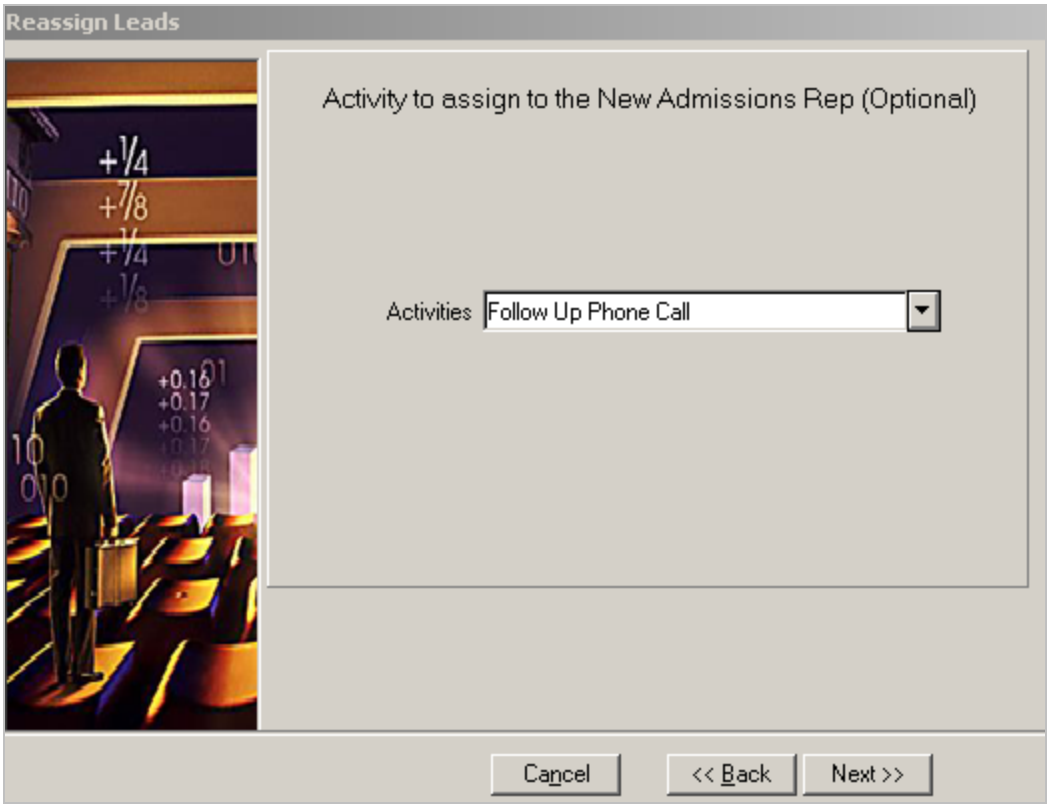
14. Select the **Student Statuses** to be included in the reassignment. Click the **plus signs** (+) to expand the list of statuses. Click the boxes beside the status descriptions to select them. If you select a high-level status, the lower-level statuses below it in the tree are also selected.
15. Click **Next**.



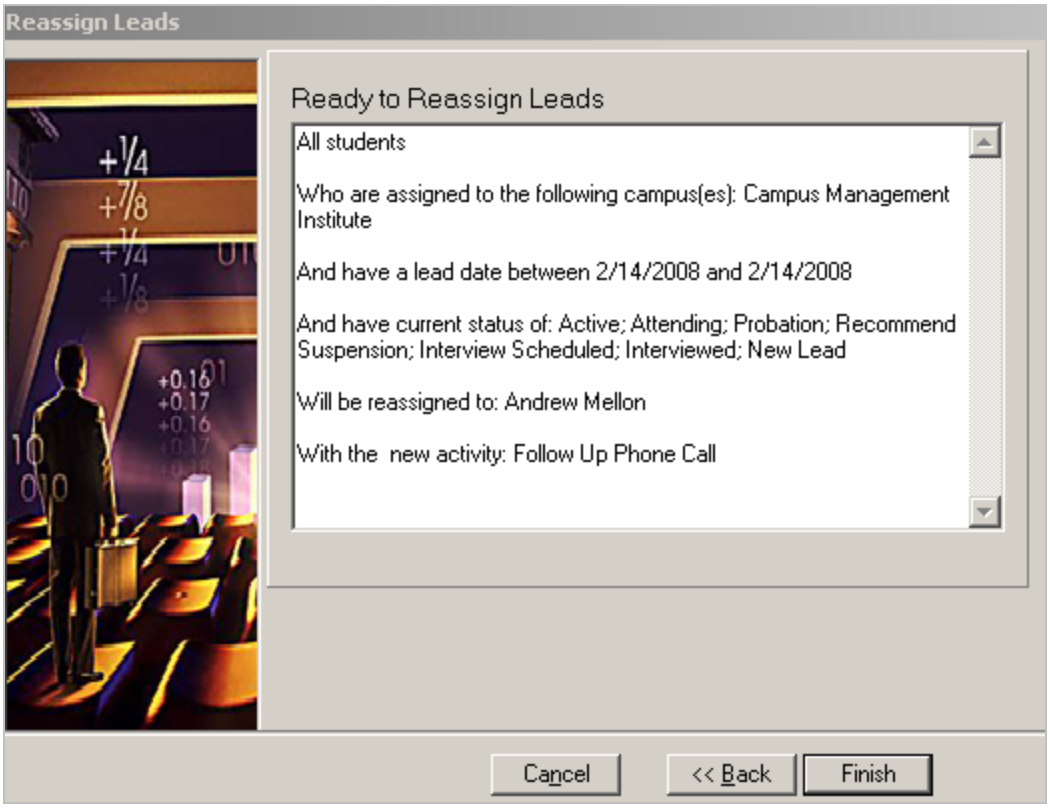
16. If these are the leads you want to reassign, click **Next**. Otherwise, click **Back** to enter revised selection criteria.



17. Select the **Admission Rep(s)** to whom the leads will be assigned. Click the box next to a rep's name to select or deselect a representative. A check mark in the box next to the representative's name means that the representative will share in the reassignment of leads. Click **Select All** or **Clear All** if necessary to help in the selection process. You can assign leads to one or more admissions representatives: to select more than one representative, check multiple boxes.
18. Enter the maximum number of selected leads to be reassigned to the selected **Admissions Rep**. **Note:** For selected reps, the program will default to a maximum of 999,999 leads. If you do not change this default, the first representative listed will receive all transferred leads.
19. Click **Next**.



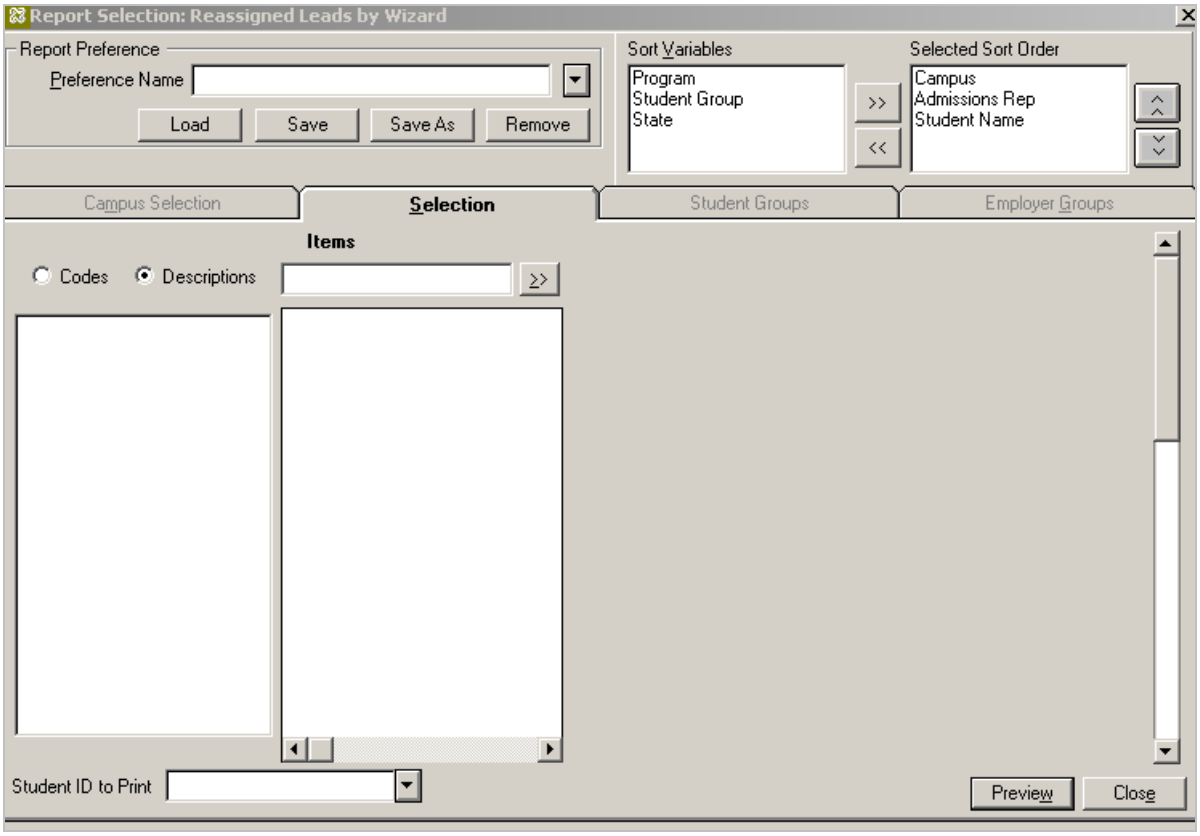
20. Select the **Activities** to assign to the new **Admissions Representative.**
21. Click **Next**.



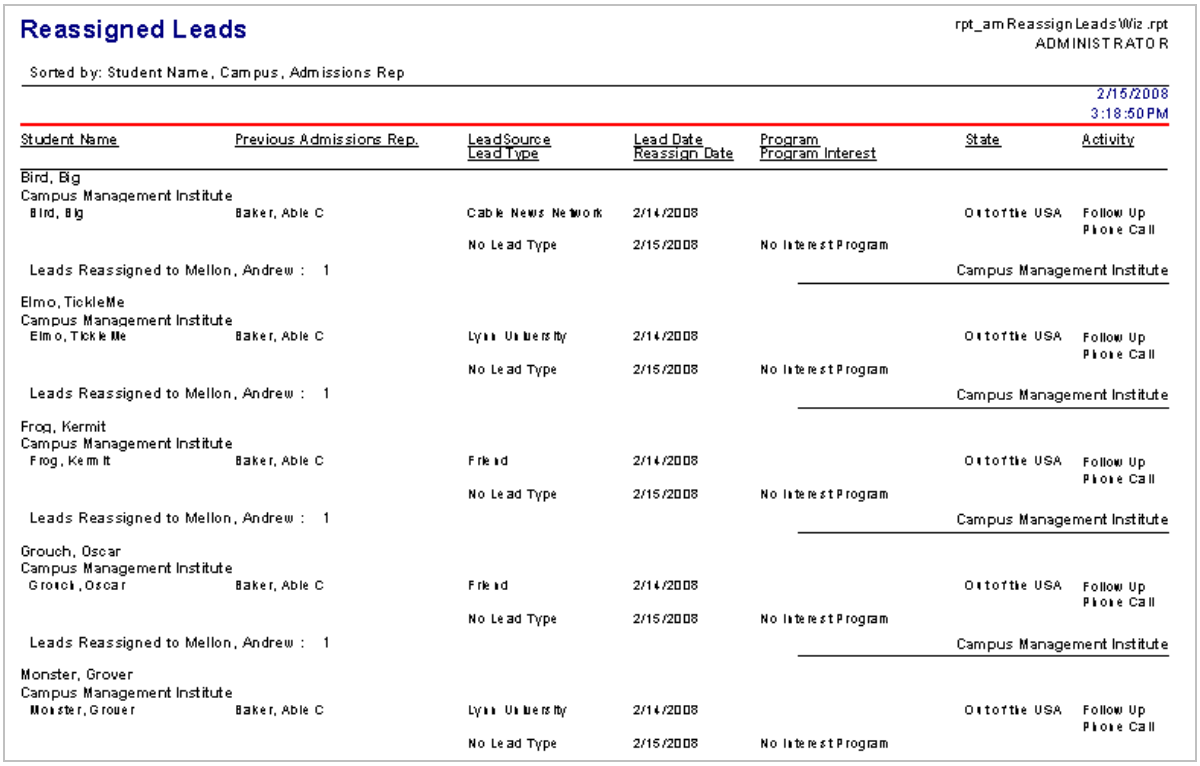
Important: The program will display a description of the reassignment process it is about to perform. Read this statement carefully to ensure it is what you want to accomplish. If the statement does correctly describe your intentions, click **Finish** to continue the reassignment. If the statement does **not** correctly describe your intentions, click **Back** to go back and make any necessary corrections. If necessary, you can click **Cancel** here and start all over again.

When you click **Finish**, the program will change the lead records to reflect the reassignment of Admissions Rep(s):

22. A confirmation message is displayed when the process is complete.
23. Click **OK**. Click **Print** to review and/or print the reassigned leads:



Click **Preview** to see the report:



Reassigned Leads

rpt_amReassignLeadsWiz.rpt
ADMINISTRATOR

Sorted by: Student Name, Campus, Admissions Rep

2/15/2008
3:18:50 PM

Student Name	Previous Admissions Rep.	Lead Source / Lead Type	Lead Date / Reassign Date	Program / Program Interest	State	Activity
Bird, Big						
Campus Management Institute						
Bird, Big	Baker, Able C	Cable News Network	2/14/2008		Ottoffie USA	Follow Up
						Phone Call
		No Lead Type	2/15/2008	No Interest Program		
Leads Reassigned to Mellon, Andrew : 1					Campus Management Institute	
Elmo, TickleMe						
Campus Management Institute						
Elmo, TickleMe	Baker, Able C	Lynn University	2/14/2008		Ottoffie USA	Follow Up
						Phone Call
		No Lead Type	2/15/2008	No Interest Program		
Leads Reassigned to Mellon, Andrew : 1					Campus Management Institute	
Frog, Kermit						
Campus Management Institute						
Frog, Kermit	Baker, Able C	Friend	2/14/2008		Ottoffie USA	Follow Up
						Phone Call
		No Lead Type	2/15/2008	No Interest Program		
Leads Reassigned to Mellon, Andrew : 1					Campus Management Institute	
Grouch, Oscar						
Campus Management Institute						
Grouch, Oscar	Baker, Able C	Friend	2/14/2008		Ottoffie USA	Follow Up
						Phone Call
		No Lead Type	2/15/2008	No Interest Program		
Leads Reassigned to Mellon, Andrew : 1					Campus Management Institute	
Monster, Grover						
Campus Management Institute						
Monster, Grover	Baker, Able C	Lynn University	2/14/2008		Ottoffie USA	Follow Up
						Phone Call
		No Lead Type	2/15/2008	No Interest Program		

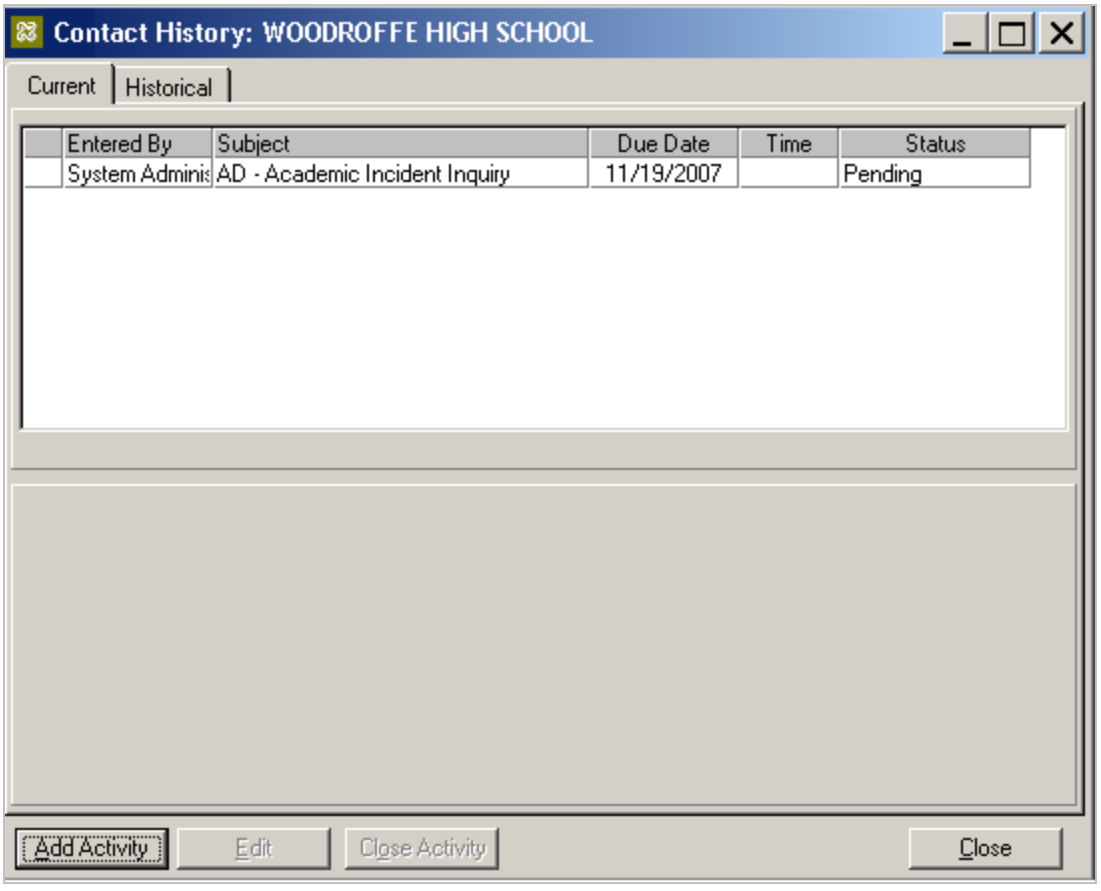
High School Activities

The High School Activities feature is very similar to student activities. You can maintain a list of activities related to a given high school. High school activities are assigned to specific staff members and can be related to specific students. It is not necessary to relate a high school contact to a student. Access to high school activities is through the High School form in the Admissions module.

Before you begin to use employer activities, set up high school-related activities under **Lists > Contact Manager > Activities**. You can set up outgoing and incoming phone calls, letters, meetings, and so on. High school-related activities will appear on the staff member's Contact Manager form and the Daily Calendar form.

To work with the high school activities forms:

1. Navigate to **Daily > Admissions > High Schools**. The High Schools form is displayed.
2. Search for a high school for which you want to view or add an activity. Search by entering one or more search criteria and click **Search** .
3. Once a high school is found, double-click the school name and click **Edit**.
4. Click **Activities**. The Contact History form is displayed. This form lists all activities related to the selected high school.

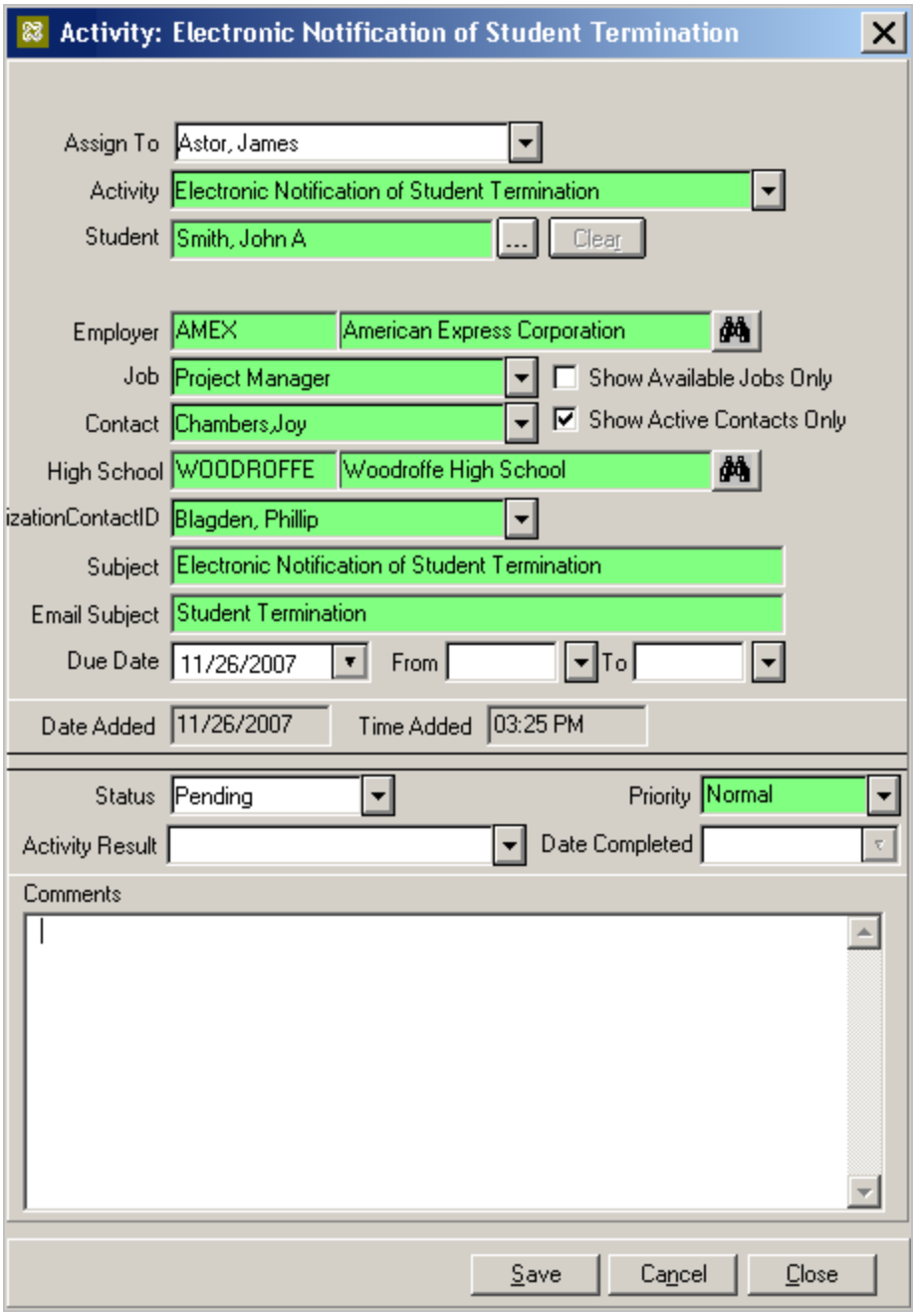


5. Click **Add Activity** to add a new activity, or select an activity on the grid and click **Edit** to see the details. The Activity form is displayed.

When adding an activity from the High School form, users will see the selected high school as the default in the High School field after clicking the high school search button on the activity form.

6. Enter or edit the activity data in the Activity form as required.

    - The **Assign To** field contains your name. If your system administrator has granted you permission, you may assign an activity to another person by using the drop-down list.
    - When adding a new **Activity**, you must select from the list of activities that have been previously set up under Lists > Contact Manager > Activities.
    - The **High School** shows the name of the High School previously selected on the High School form.
    - The **Subject** is a required field.
    - The **Due Date** and **From** and **To** times of the activity may be entered.
    - The **Status** defaults to *Pending*. Other status values may be selected from the list.
    - The **Priority** defaults to *Normal* but may be set to *Low* or *High* if required.
    - If the activity Status is entered as 'Closed', you must select and item from the **Activity Result** list.
    - When the activity is complete, the **Date Completed** field may be updated.

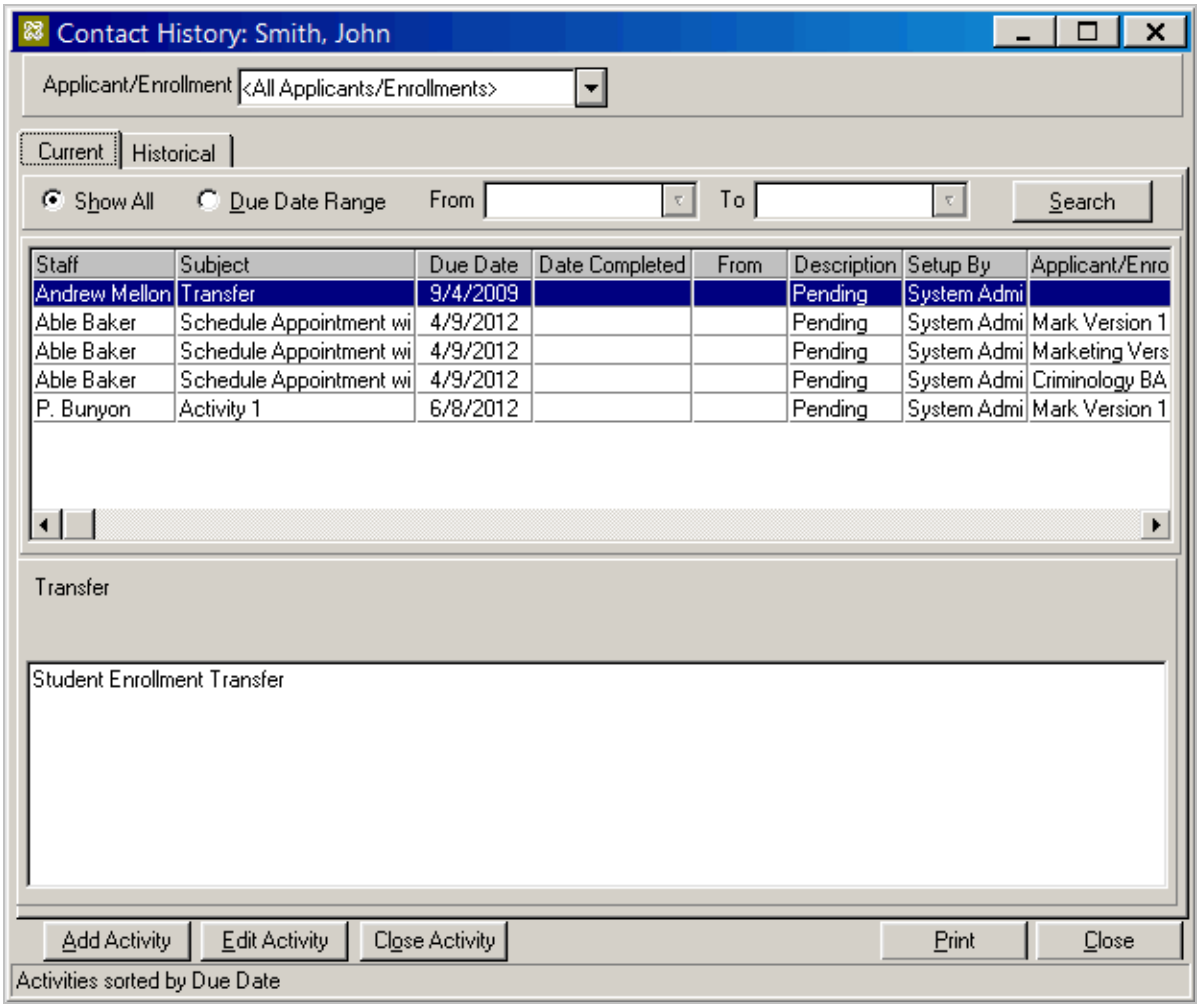


Note: When an activity record is being edited by a staff member, it is locked and may not be viewed by other staff members. When you finish editing the activity, the record is unlocked and may be accessed by another staff member. If you attempt to edit an activity that is already being edited by another user, you will see a message *[Staff Member Name] is currently working on this activity. Please try later.*

If you are editing an activity for a long period of time, you may see a message *This activity is set to unlock automatically within [NNN] minutes. Click Continue if you wish to continue.* Clicking **Continue** to continue editing the activity. If you do not acknowledge the message, the system eventually terminates your editing session and you may lose any changes you have made to the activity.

7. Click **Save** to save your new activity or changes to an existing activity. CampusNexus Student closes the Activity

form and adds the activity to the **Contact Manager Activities** list of the assigned staff member.



8. Click **Close** to close the form.

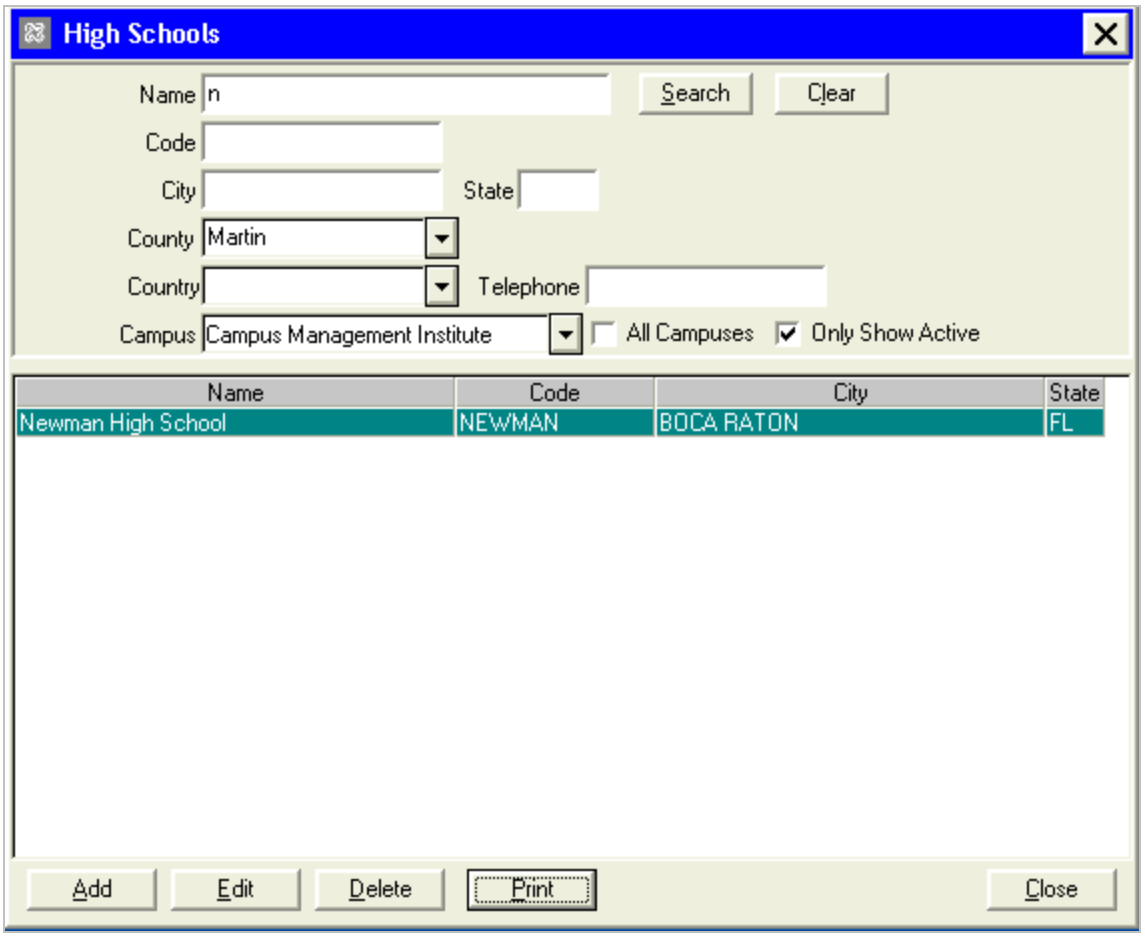
High Schools

The High Schools list contains high schools from which your students are drawn. Your institution may have special relationships with people at these schools such as principals, guidance counselors, and so on. Reports can be produced that indicate the number of students from each high school. The high school code is selected when you fill in the lead (student) record.

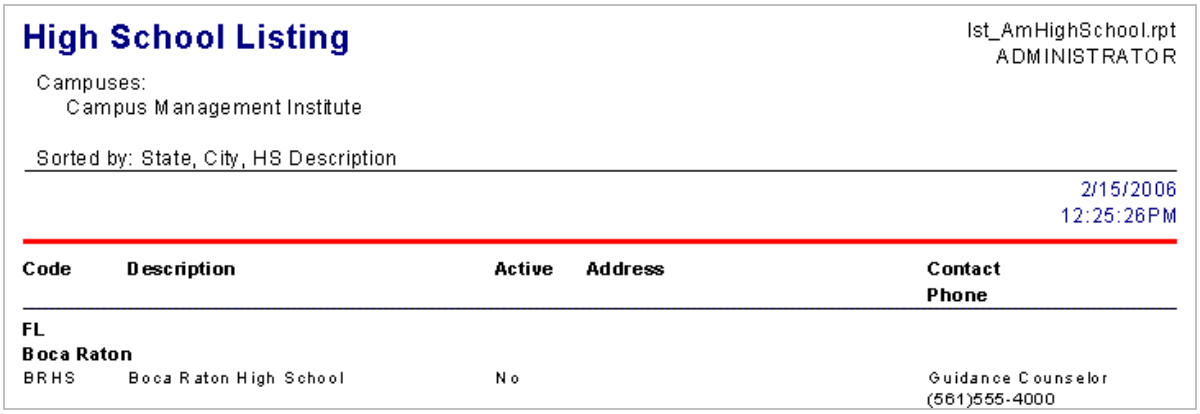
You can add an unlimited number of contacts to any high school record. Mailing labels can be printed for contacts at a selected high school. From the Reports menu, you can print contact labels for multiple schools.

To add or edit a high school:

1. Navigate to **Daily > Admissions > High Schools** . A Search form is displayed.



2. To find a high school that is already in the table, enter selection criteria and click **Search**. A list of all high schools meeting your search criteria is displayed. Click **Clear** to start a new search.
3. Click **Print**. The High School report displays a list of all high schools and their associated information as entered in the High School form.



High School Listing

lst_AmHighSchool.rpt
ADMINISTRATOR

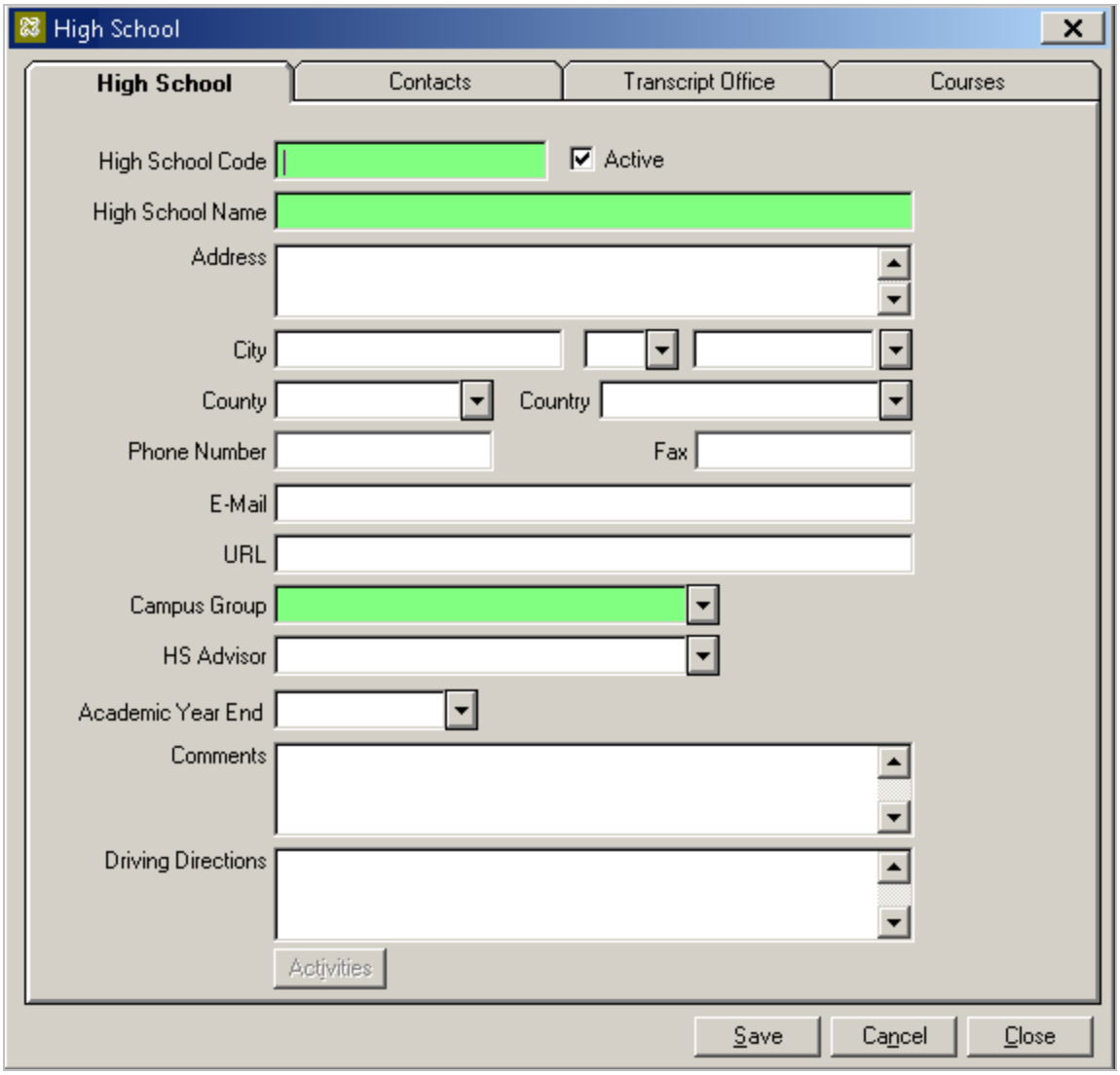
Campuses:
Campus Management Institute

Sorted by: State, City, HS Description

2/15/2006
12:25:26PM

Code	Description	Active	Address	Contact Phone
FL				
Boca Raton				
BRHS	Boca Raton High School	No		Guidance Counselor (561)555-4000

4. Select the high school that you want to modify and click **Edit**. The High School form is displayed where you may enter your changes.
5. Click **Delete** to remove a High School. Click **Yes** to continuing deleting the school or click **No** to return to the High School search form.
6. Click **Add** to add a new high school. The **High School** form is displayed.



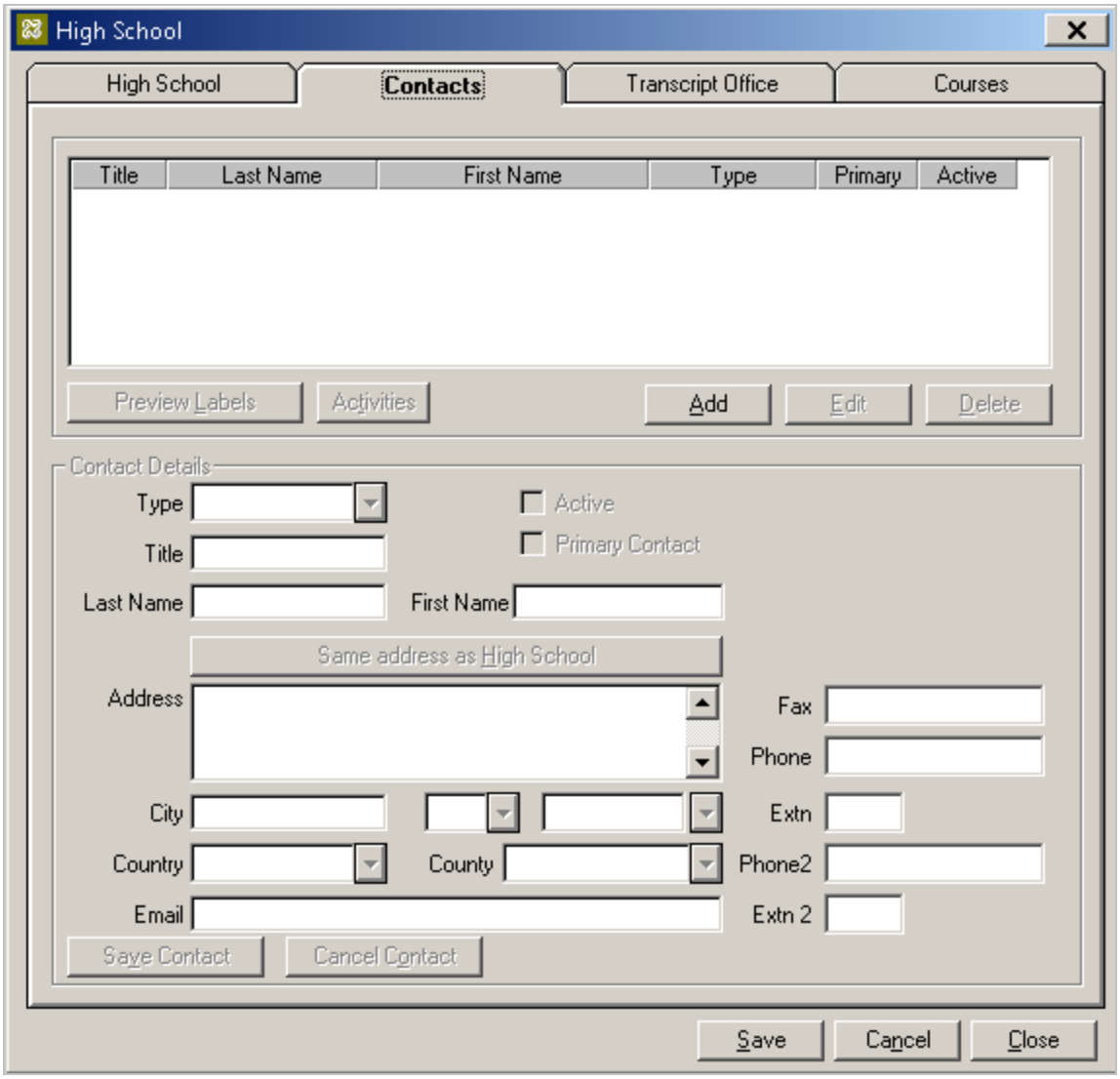
7. Enter the **High School Code**, **High School Name**, **State,Address**, and **City** for the High School.
8. Enter the **State** or select it from the list.
9. Enter the **ZIP Code** or select it from the list.
10. Select the **County**.
11. Select the **Country**.
12. Enter the **Phone** and **Fax** numbers for the High School.
13. Enter an **E-mail** address for the High School.
14. Enter the **URL** containing the web address for the High School.
15. Select the **Campus Group**.
16. Select the **HS Advisor**.

Note: The list shows those staff members who are members of the staff group associated with an advisor group or "Organization Liaison" are active.

17. Select the **Academic Year End**.
18. >Enter any **Comments** that pertain to the high school.
19. >Enter **Driving Directions** from the campus to the high school.
20. >Click **Activities** to open a form where you can add/edit activities associated with the high school.
21. Click **Save**.

Contacts tab

1. Click the **Contacts** tab.



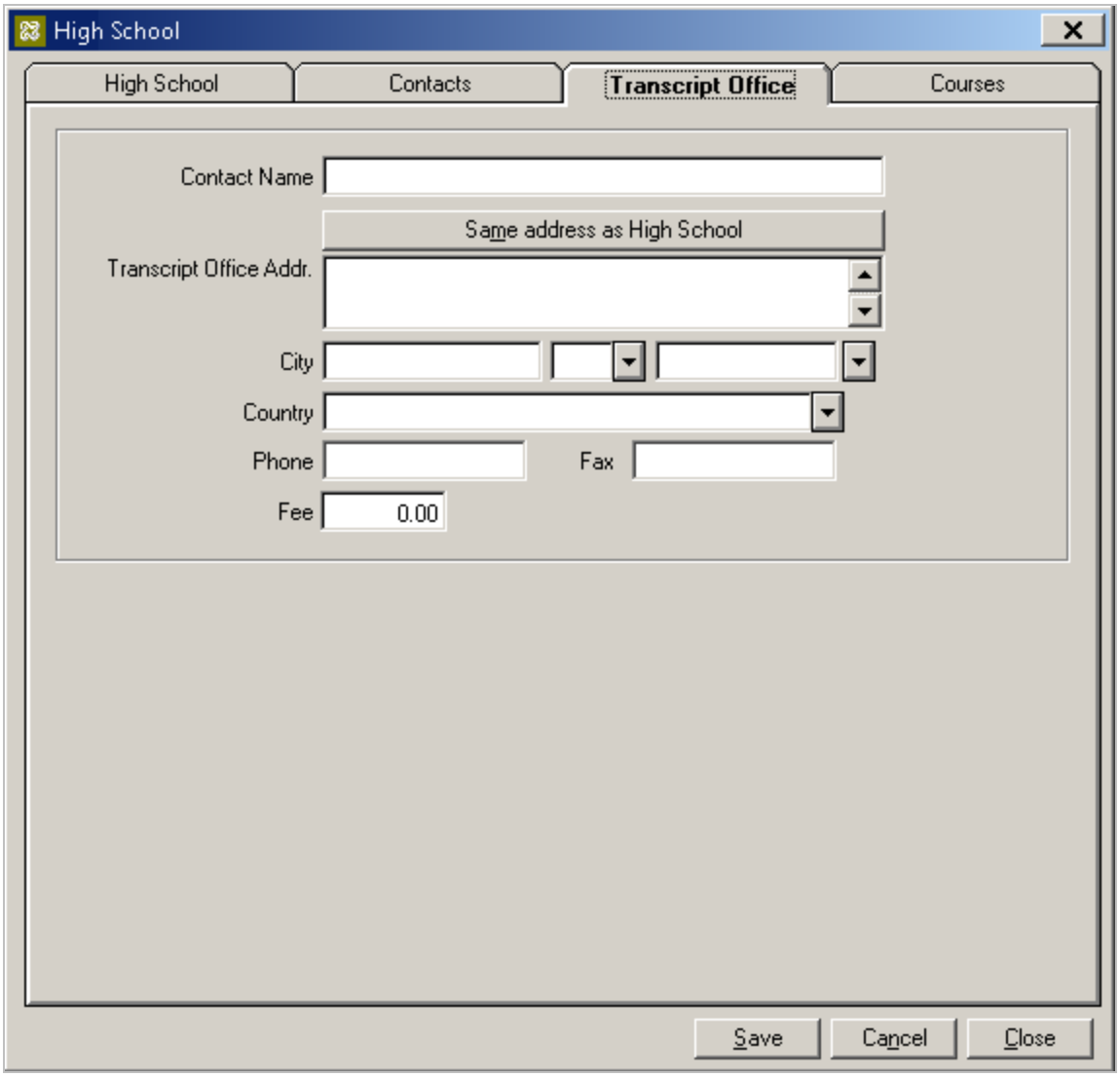
2. Click **Add** to add a new contact using the Contact Details fields.
3. Select an existing **Contact Type** from the list or enter a new contact type. When you add a new contact type, the

description is added to the High School Contact Type table.

4. Select **Active** to indicate that this contact is currently active.
5. Select **Primary Contact** to indicate that this is the primary contact for the high school.
6. Enter the name and address information for the contact. If the address information for the contact is the same as for the school, click **Same address as High School**. The school address information is copied to the contact form.
7. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Transcript Office tab

1. Click the **Transcript Office** tab.

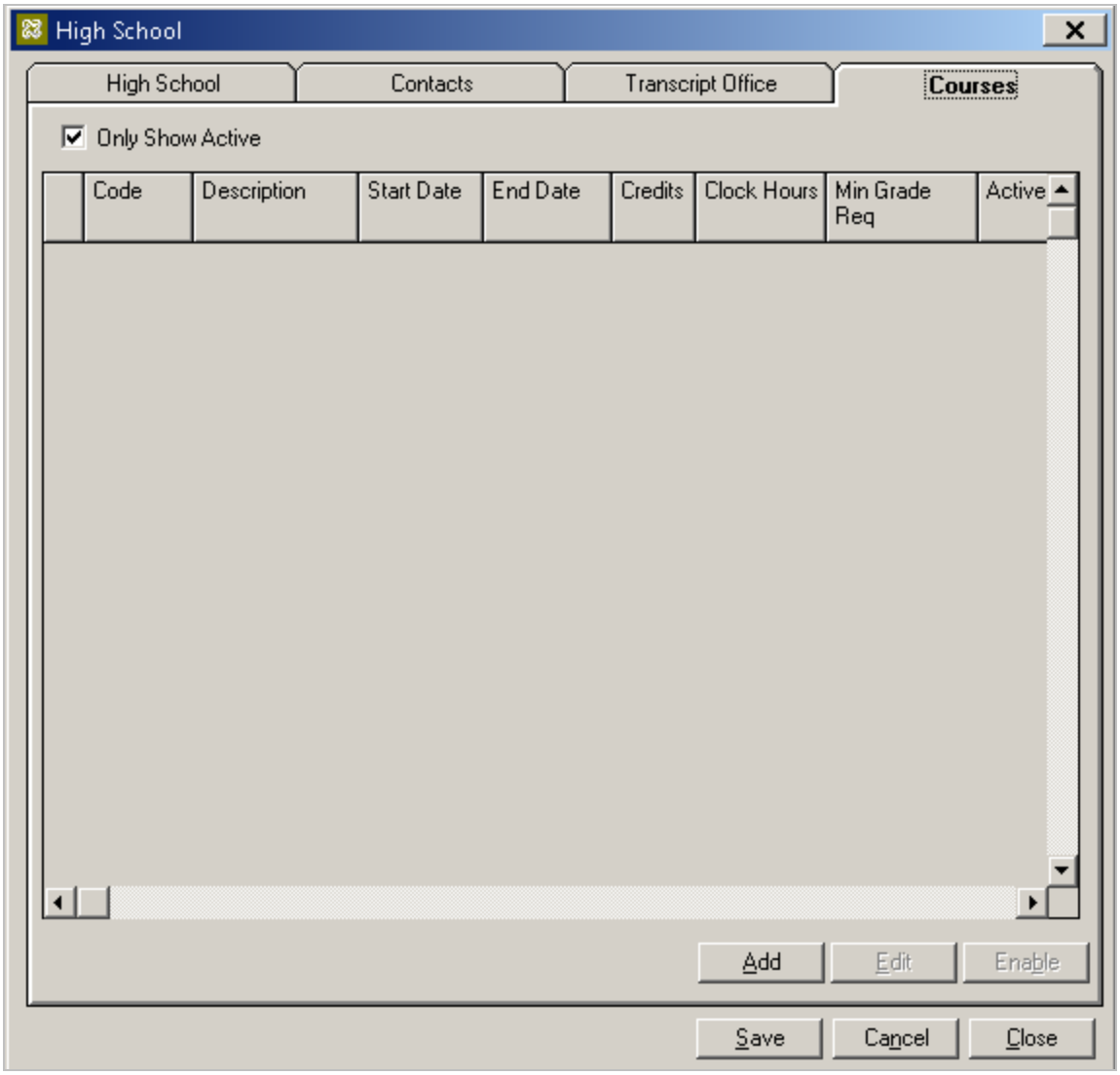


2. Enter the name and address information for the contact. If the address information for the Transcript Office is the same as for the school, click **Same address as High School**. CampusNexus Student copies the school address information to the form.

3. Enter the **Fee** associated with the transcript service.
4. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

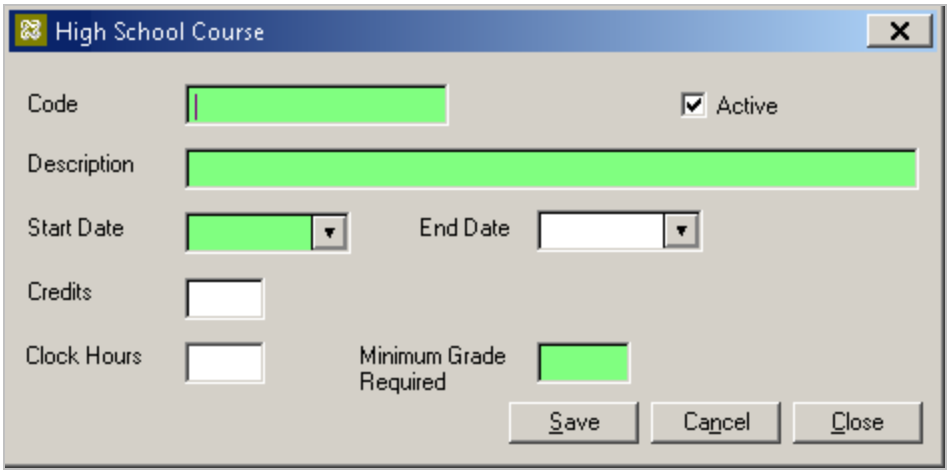
Courses tab

1. Click the **Courses** tab.



This tab allows you to associate and maintain courses with a high school (similar to the way courses can be associated and maintained with colleges).

2. Select the **Only Show Active** check box to display only the active courses for the high school.
3. Click **Enable/Disable** to enable or disable high school courses, respectively.
4. To add or edit a course in the grid, click **Add** or select a course in the grid and click **Edit**.
5. On the **High School Course** form, enter the following information for the high school course:



Field Descriptions

Field	Description
Code	Variable-length string with a maximum length of 16 characters.
Description	Variable-length string with a maximum length of 75 characters.
Start Date	Start date of the course in the form MM/DD/YYYY.
End Date	End date of the course in the form MM/DD/YYYY.
Credits	Numeric value for the course credits.
Clock Hours	Numeric value for the course clock hours.
Minimum Grade Required	Letter grade required as a minimum.

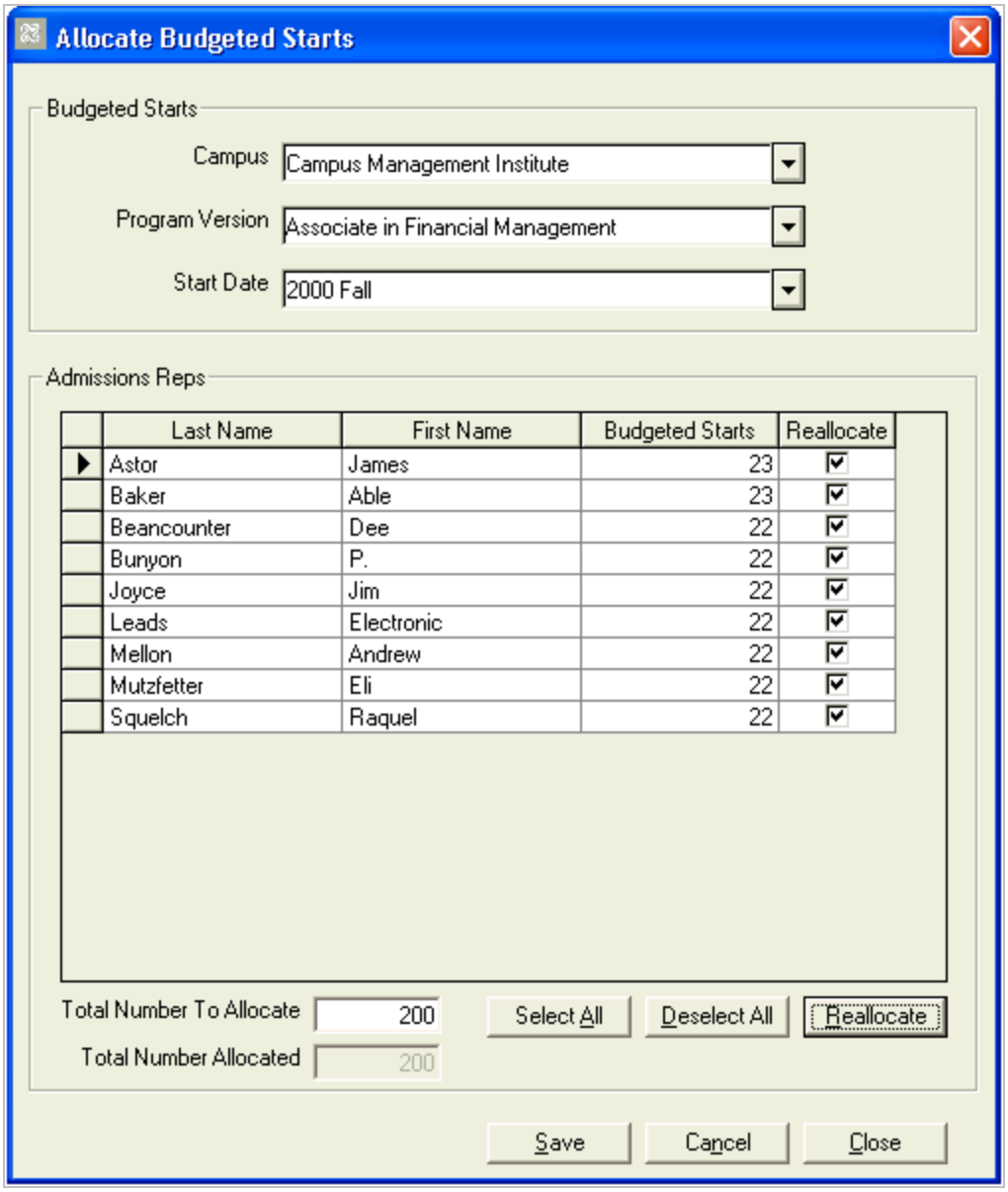
6. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Allocate Budgeted Starts

CampusNexus Student maintains a budgeted start number for start dates and lead categories and tracks a budgeted start number for each admission representative. A daily process assigns a budgeted number of starts per admissions representative by program version and start date. You can enter numbers for each staff member, or you can automatically distribute a specified number of starts evenly across selected admissions representatives.

To allocate budgeted starts:

1. Navigate to **Daily > Admissions > Allocate Budgeted Starts**.
2. Select the Budget Starts options: **Campus**, **Program Version**, and **Start Date**.



3. The Admissions Reps area of the form displayed a list of admissions reps displayed, along with the number of any

allocated budgeted starts. Use **Select All** or **Deselect All** to include or exclude all reps, or use the check boxes in the Reallocate column to include or exclude individual reps.

4. Enter the number of starts to allocate into the **Total Number To Allocate** field. Or, enter specific numbers in the Budgeted Starts column for individual reps.
5. Click **Reallocate**. The budgeted starts are allocated across the selected reps evenly or as designated.
6. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Transfer Credits

Staff members can review the list of courses transferred from other institutions, and add, view, or edit transfer credit information, and add course relationships.

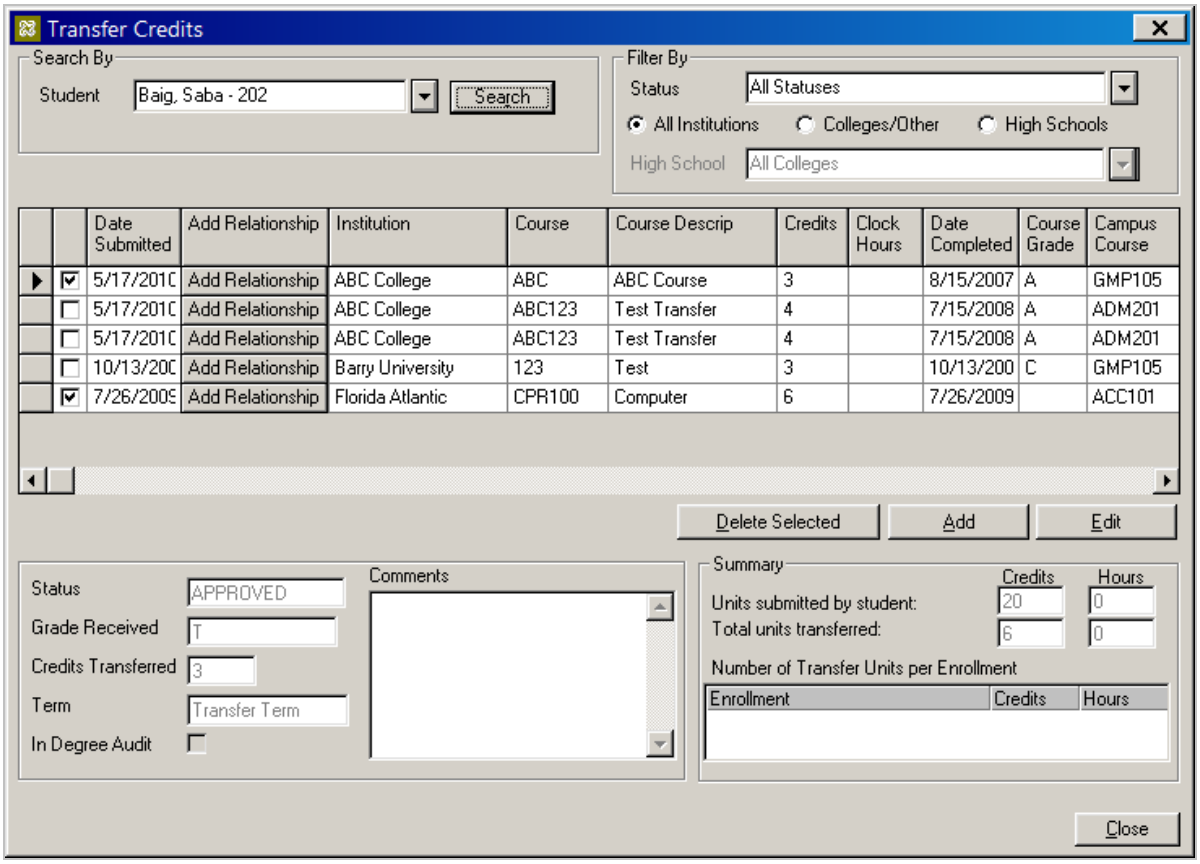
For program versions that use Academic Calendars 5 and 6 (non-term), CampusNexus Student automatically adjusts the Academic Year and Loan Period sequences and associated credits or hours and weeks as transfer credits are 'Approved' or changed from 'Approved' to a different status.

Approved transfer credits or hours in non-term configurations shorten the remaining course work that the student has to complete for the program version and is in direct relation to the academic year or loan period length and sequences. The "Credits in AY" ("Hours in AY") and "Weeks in AY" fields of the final academic year and loan periods are continually adjusted based on changes in the amount of transfer credits or hours.

When CampusNexus Student is enabled for Allow courses to be exempt from progression, the system uses the "Enrollment Status Credits (Hours)" of the linked course as the accepted value instead of the Credits or Hours value of the course on the student schedule when adjusting academic years and loan periods.

To transfer credits for an incoming student:

1. Navigate to **View > Admissions** or **Academic Records > Transfer Credits**.
   - OR -
   Navigate to **Daily > Admissions > Transfer Credits**. The Transfer Credits form is displayed.



Note: The options under **Filter By** allow you to view College transfer credit records, High School transfer credit records, or both (All Institutions). By default, **All Institutions** is selected and the drop-down lists to filter the records are unavailable.

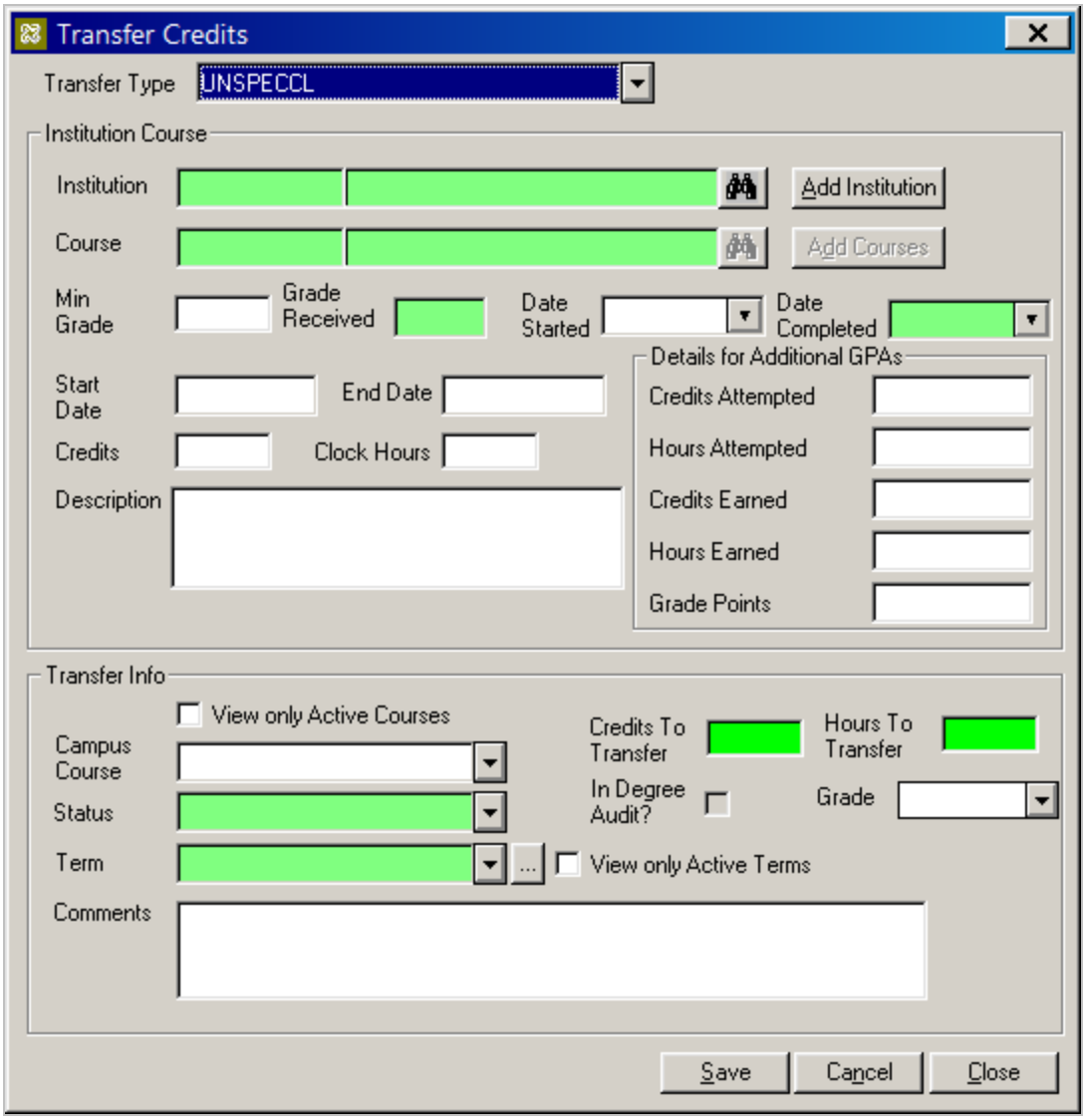
- If you select **Colleges/Other**, the College filter becomes available and only College transfer credit records get listed in the Transfer Credit grid.
- If you select **High Schools**, a High School filter becomes available and only High School transfer credit records get listed in the Transfer Credit grid. The list shows only those high schools for which Transfer Credit records are available.

Note regarding Number of Transfer Credits per Enrollment:

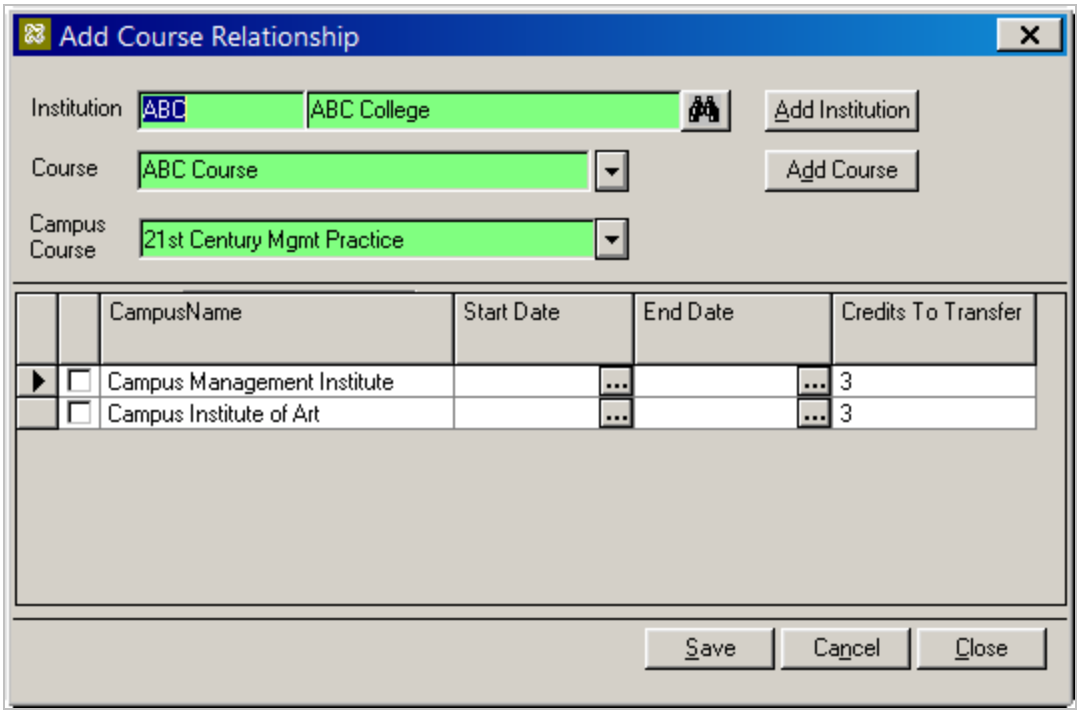
CampusNexus Student accurately tracks and updates the number of Transfer Credits on the student enrollment. If applicable, the following warning is displayed:

Transfer Credits entered exceed the number currently tracked on the enrollment. Automated processes or the academic year tool can be run to update the enrollment and Academic Years. If the student's current Academic Year is adjusted, the student should be repackaged according to the adjustment.

2. Click **Add**, or select a record and click **Edit**. The Transfer Credits form is displayed. The state (enabled/disabled) of **Add Institution** and **Add Courses** buttons depends on the staff member's Admissions security settings.



3. Complete the fields on this form as needed. See Field Descriptions.
4. To add a trans credit relationship to another campus, select a record and click **Add Relationship**. The Add Course Relationship form is displayed. Complete the fields on this form as needed.



5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Field Descriptions

Field	Description
Transfer Type	Use this drop-down list to select College or High School type of transfer credits. The list is populated with the entries available under Lists > Admissions > Transfer Type (tab). **Note**: The Institution Course frame and Transfer Info frame of the Transfer Credits form remain unavailable (dimmed) until you select a Transfer Type. If you select a College Transfer Type, you can Select/Add College and College Courses for transfer credit records. If you select a High School Transfer Type, you can Select/Add High School and High School Courses for transfer credit records.
Institution Course Fields	
Institution	Name of the institution (i.e., College/Other or High School) from where the course is being transferred is displayed in this field. You can use Search to select the institution using the Search College or Search High School forms. If the institution is not listed and you have proper access, click **Add Institution** to display a form with which to add the school.

Field	Description
Course	The name of the course being transferred is displayed in this field. You can select the course using Search. If the course is not listed and you have proper access, click **Add Courses** to display a form to add the course.
Min Grade	Minimum grade allowed for successful completion of the transferred course
Grade Received	Grade the student achieved
Date Started	Date when the student started the course
Date Completed	Date when the student completed the course
Start Date	Effective start date for the course
End Date	End date for the course
Credits	Number of credits the student earned at the institution where the course was taken
Clock Hours	Number of clock hours the student earned at the institution where the course was taken
Description	Brief description of the course
Transfer Info Fields	
View only Active Courses	Select this check box to filter terms by Active only.
Campus Course	Equivalent course offered by the selected campus
Credits to Transfer	Number of credits to transfer
Hours to Transfer	Number of clock hours to transfer
Status	Transfer status. A not yet **APPROVED** transfer status displays on the Degree Progress Audit only if a **Campus Course** is selected on the **Transfer Credits** folder. **Note**: If configured (Lists > Admissions > Transfer Status), the field displays course information on the Degree Progress Audit.
In Degree Audit?	This check box is enabled when the **Campus Course** selected is in the Program Version's required course list.
Grade	The student's grade to associate with the transferred course
Term	Term when the credits are applied **Note**: Non-term functionality in CampusNexus Student allows users to add transfer credits at any point during the student life cycle. Transfer credits adjust the academic year attributes and therefore the time it takes a student to complete the program.
View only Active Terms	Select this check box to filter terms by Active only. By default all terms, active and inactive, appear on the Term list.
Comments	Any related comments

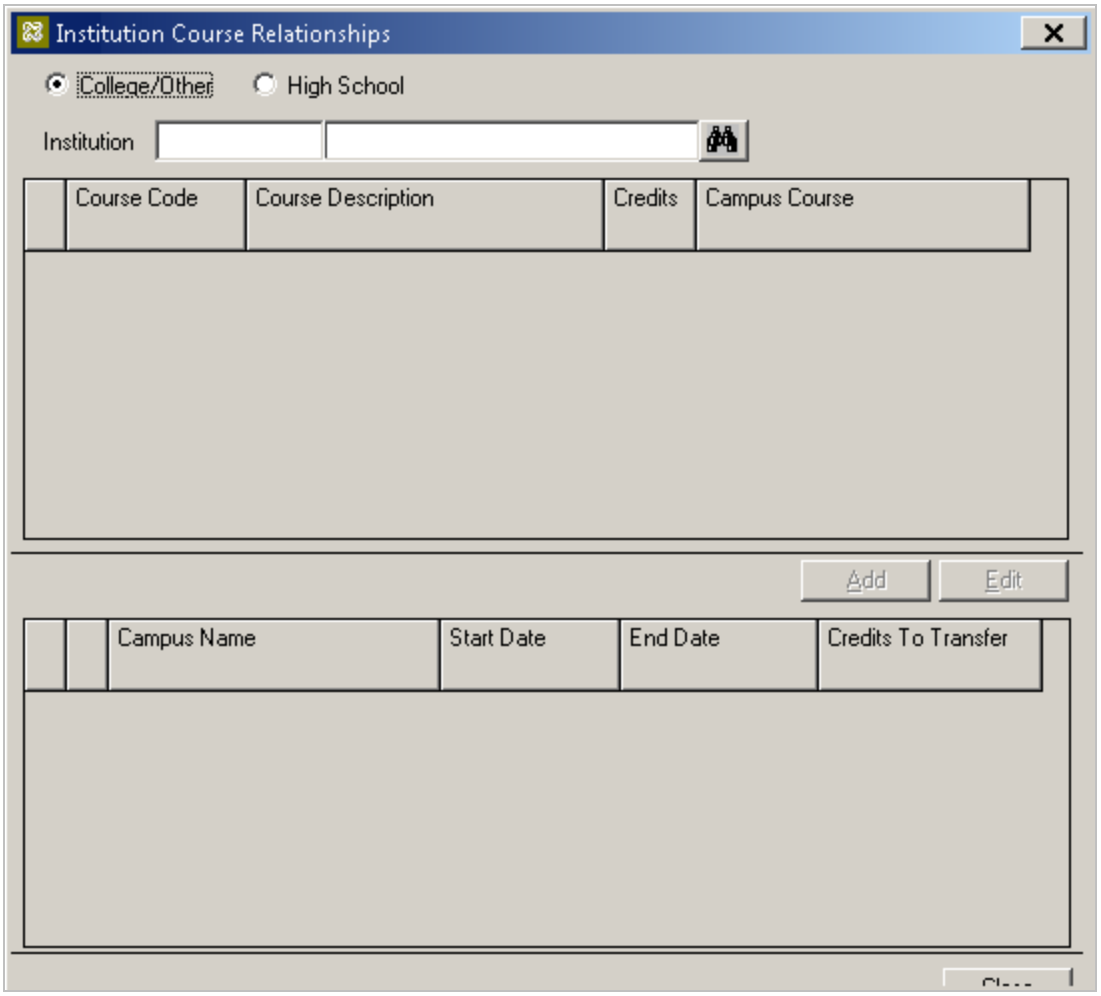
Field	Description
Details for Additional GPAs The fields **Credits Attempted**, **Hours Attempted**, **Credits Earned**, **Hours Earned**, and **Grade Points** capture the information from previous institutions so that you can include courses for students from other schools in a school-defined GPA calculation. See school-defined GPAs/Additional GPAs. When adding a new transfer credit record, the fields Credits Attempted, Hours Attempted, Credits Earned, and Hours Earned are populated from Course Credits and Course Clock Hours as soon as you select a course. If the school-defined GPA is configured to use transfer courses and is a weighted GPA, these grade points are multiplied by the credits attempted to get the quality points for the calculation.	
Credits Attempted	Number of Credits Attempted from the student's transcript
Hours Attempted	Number of Hours Attempted from the student's transcript
Credits Earned	Number of Credits Earned from the student's transcript
Hours Earned	Number of Hours Earned from the student's transcript
Grade Points	Number of Grade Points from the student's transcript

Manage Course Relationships

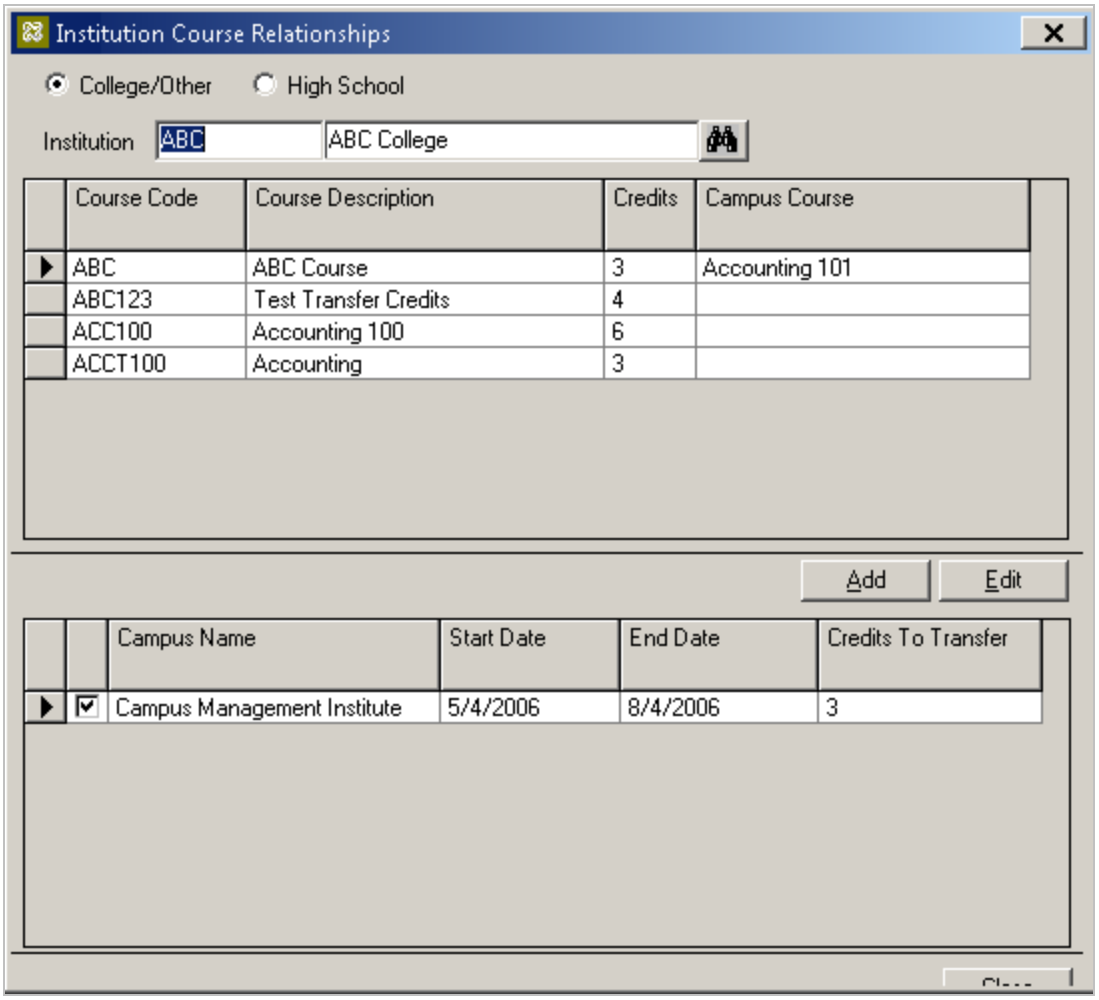
Courses offered at other institutions may resemble courses at your college. This feature allows you to manage the number of credits allowed for courses from other institutions when students transfer to your college.

To manage a course relationship:

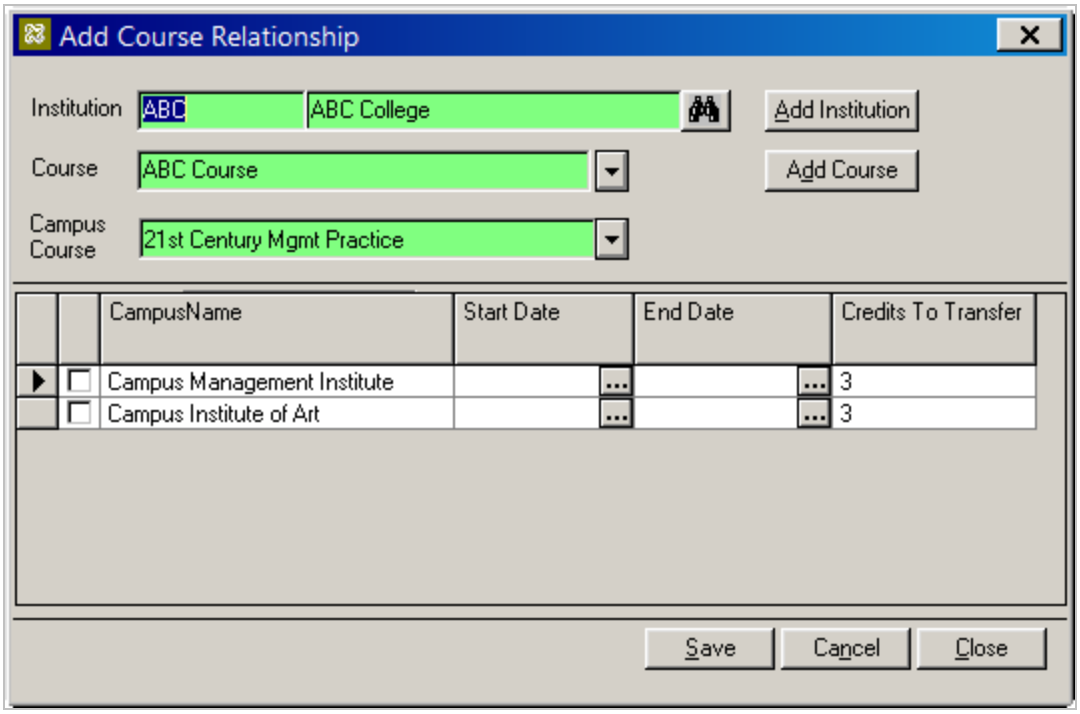
1. Navigate to **Daily > Admissions > Manage Course Relationships**. The Institution Course Relationships form is displayed.



2. Select **College/Other** or **High School** to indicate the type of institution that may be transferring students with courses that match courses from your college.
3. Click to the right of the Institution field to search for and select the institution from which course credits are to be transferred (the Search College form or Search High School form is displayed, corresponding to the option selected above).
4. Courses that have been entered for the selected institution are displayed. Click **Add** to add more courses for this institution, if applicable.



5. Select a listed course and click **Edit** to modify transfer information about that course. The Add Course Relationship form displays the **Course** to be transferred and the **Institution**.



6. From the **Campus Course** list, select a course from your college that corresponds to the course from the other institution.
7. Select a campus and enter the effective **Start Date** and **End Date** (if known), the number of **Credits to Transfer** for the selected course, and select the check box next to the **Campus Name** if this course relationship applies to the listed campus.

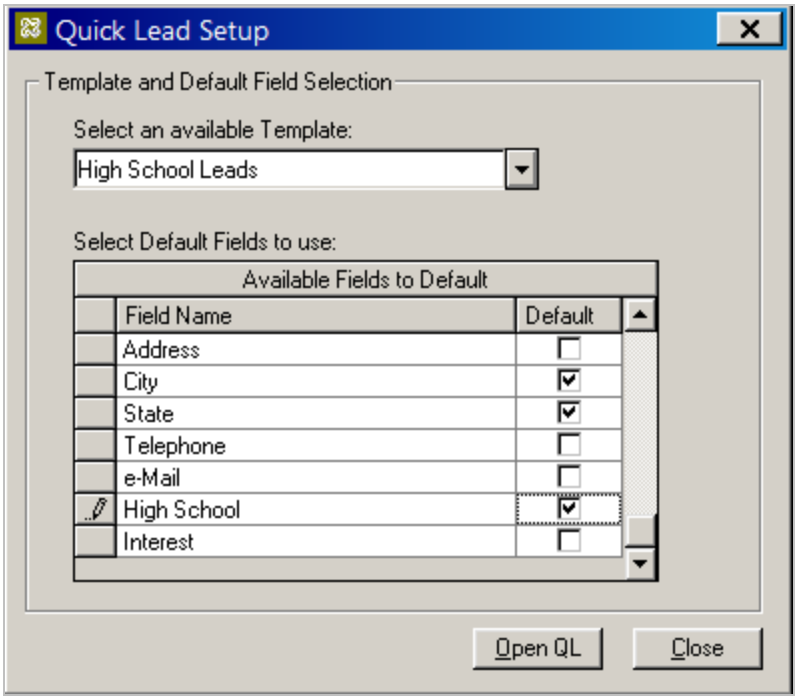
   Note: The date range entered when creating a course relationship is meant to be an effective date range for the course relationship that controls when the transfer credit can be approved. It is not a date range that is applied to course start dates to evaluate if the student took the course between certain dates.
8. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Batch Quick Lead Entry

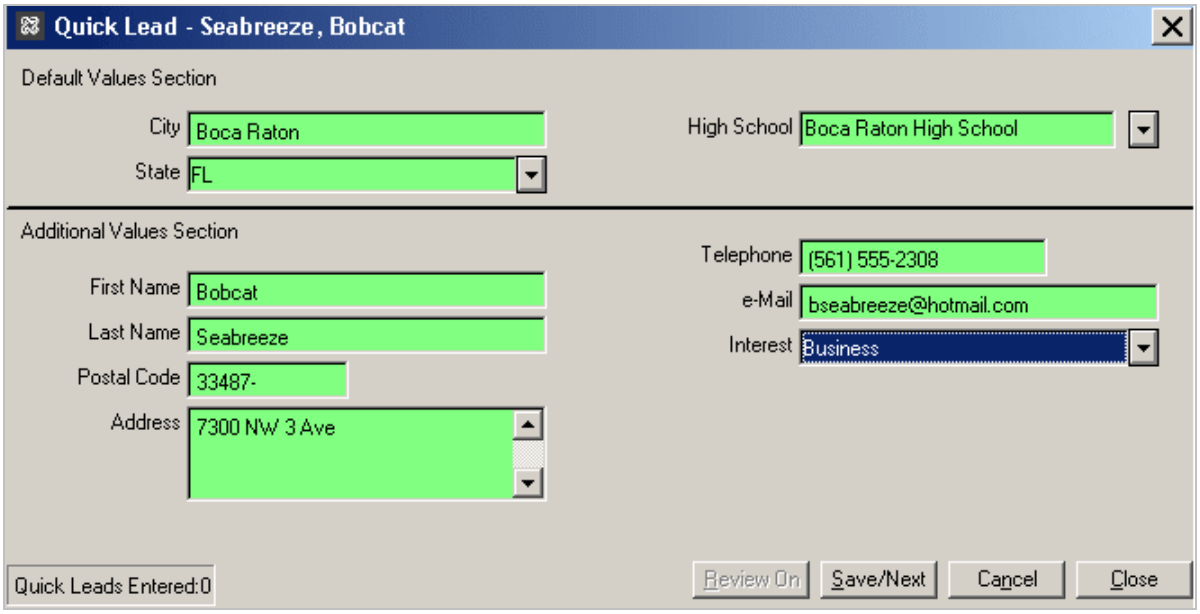
The Batch Quick Lead Entry form is used to quickly add leads to your student master database. You can implement forms for different types of leads. See Quick Lead Form Design for information about designing forms.

To work with the Batch Quick Lead Entry forms:

1. Navigate to **Daily > Admissions > Batch Quick Lead Entry**. The Quick Lead Setup form is displayed.



2. Select a **Template** for the lead entry process.
3. Select **Default** fields. These fields will appear the top of the lead entry form. See the example below.
4. Click **Open QL** to begin entering leads. The Quick Lead form is displayed with the selected default fields at the top.

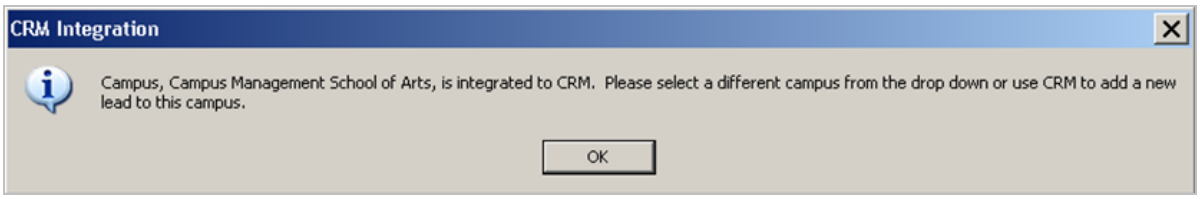


5. Fill in the default fields first. These fields are related to all subsequently entered new leads until you close the form. If necessary, change the data in the default fields to continue with a batch of leads without closing the form.
6. Fill in the remaining fields on the form for each new lead.
7. Click **Save/Next** to save a new lead and open the next new lead record. The non-default fields are cleared on the new form. The default fields are not cleared.

   The Quick Leads Entered count is incremented you save a new lead record. The counter resets when you close the form and reopen it for a different batch of leads.

   Optional: Click **Review On** to see the list of leads previously entered during this session. A pop-up window displays the names of the previously entered leads.
8. Click **Close** to close the form.

Note: When creating a Quick Lead for the default campus and if the (system level) **CRM Integration** and (campus level) **Enable CRM Integration** check boxes are selected, but the (campus level) **Enable new lead entry from CampusNexus Student when CRM is integrated** check box is cleared, the following message is displayed:



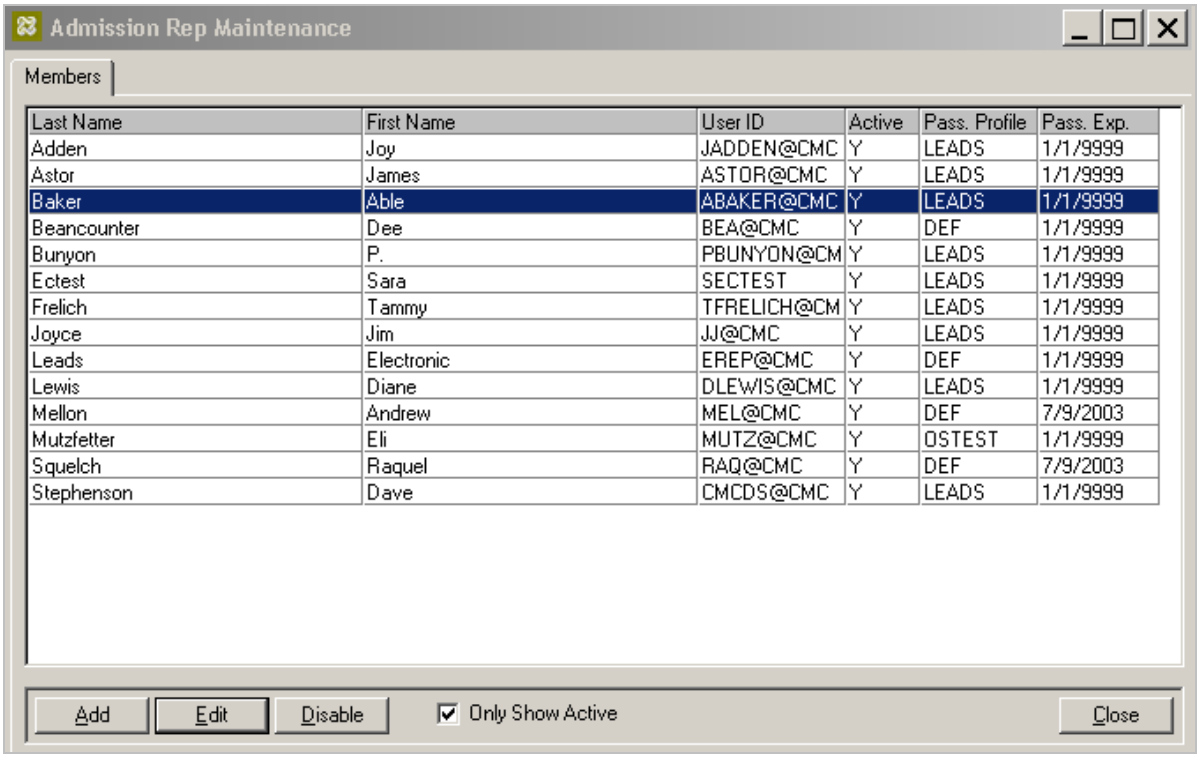
Note: For more information, see CampusNexus Student CRM Integration settings.

Admission Rep Maintenance

The daily maintenance function enables staff members at campus levels to add new admission reps and update information for existing staff members (of the Admissions Rep Group only).

This feature allows for limited access to staff member creation or edits from the Daily menu. However, if the user needs to access the User Info or Contact Manager Policy for the staff member, follow those instructions.

1. Navigate to **Daily > Admissions > Admissions Rep Maintenance**. The Admission Rep Maintenance form is displayed.



2. Upon creation of a staff member through the Daily menu, you will be prompted to enter the remaining user information, such as name, address, department, etc. All other required fields are gathered from the template and written to the new staff record when added.
3. Select the **Only Show Active** check box to display only active staff members.
4. Select a staff member and click **Disable** to deactivate a staff member or click **Enable** to activate a staff member that has been deactivated.
5. Click **Add** to add a new staff member, or select an existing staff member and click **Edit** to modify information.

   Note: Since CampusNexus Student allows you to change the staff member configuration through the Admissions Rep Maintenance form, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.
6. Click the **Members** tab to view or edit staff members associated with the Admission Rep group.

When you select a staff member to edit, the Staff Information form is displayed. The information on the Home Address tab, Work Address tab, and HR Info tab will be fully displayed.

The User Info tab allows for the Campus Group association, and the initial password creation (upon Edit, password options are hidden).

The Groups tab has the Admission Rep default group as a permanently selected group for the staff member. Additional groups can be assigned to the new staff member if the groups have been identified as Admission Rep groups within the new staff group attribute. The user may assign a Setup Template from the templates associated with the selected staff groups. The Setup Template defines the user-level permissions and Contact Manager policy for the staff member being created.

7. Click Picture to access the staff member's picture.
8. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Import Test Scores

Within the Import Test Scores module, you can select the test type you want to import into CampusNexus Student. Your test file must be a flat file with the current file layout provided by the official testing centers. After test files are imported into CampusNexus Student, the system will archive the file name by renaming the file with a ".imp" file extension.

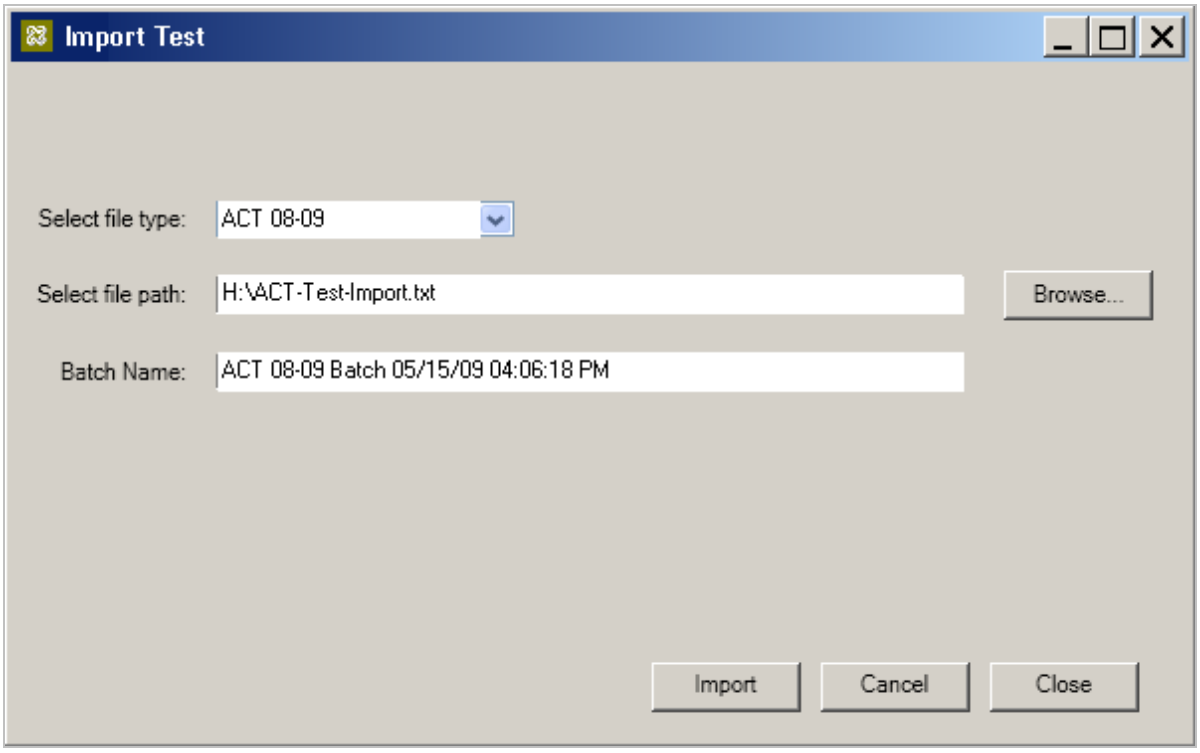
Note: Anthology Inc. no longer supports yearly updates for the admissions test, including SAT, ACT, CAAP. Likewise, the ability to modify current file layouts for yearly updates are also no longer supported. Institutions are now responsible for tracking changes to these tests and updating them in the CampusNexus Student database through the user interface provided.

Also, before using this feature for the first time, you need to perform a prerequisite configuration (a one time event) within the Test File Matching Criteria form in the standard interface (web client) of CampusNexus Student (Settings > Admissions > Test File Matching Criteria). Configure matching criteria settings for the test file to be used on a test import that includes a student's social security number as well as other student related fields.

This one-time configuration can also be done via a script. Please contact Anthology Inc. Support for more details.

To import tests:

1. **Select file type** to select a test type you will be importing into CampusNexus Student.
2. **Select file path** to specify the drive location where your test file is stored.
3. After the **Select file path** field is populated, the system will automatically create a **Batch Name** as follows: "<Test Type> Batch <Date and Time>". You can change the batch name if needed.



4. Click **Import** to start the process. The system will validate that the file selected has the correct file format for the file type selected.

Note: After the import completes, a message box with **Yes** and **No** buttons is displayed stating: "<Record Count> records imported successfully. Do you want to import another file?". If you click **Yes**, the form will be refreshed and will remain open to import another file. If you click **No**, the form will close. After the file is imported, the system will change the file extension to ".imp".

The system will automatically match test records to existing students if the SSN from the file matches a student record in the system. If such a match exists, all tests will be inserted under View > Admissions > Tests.

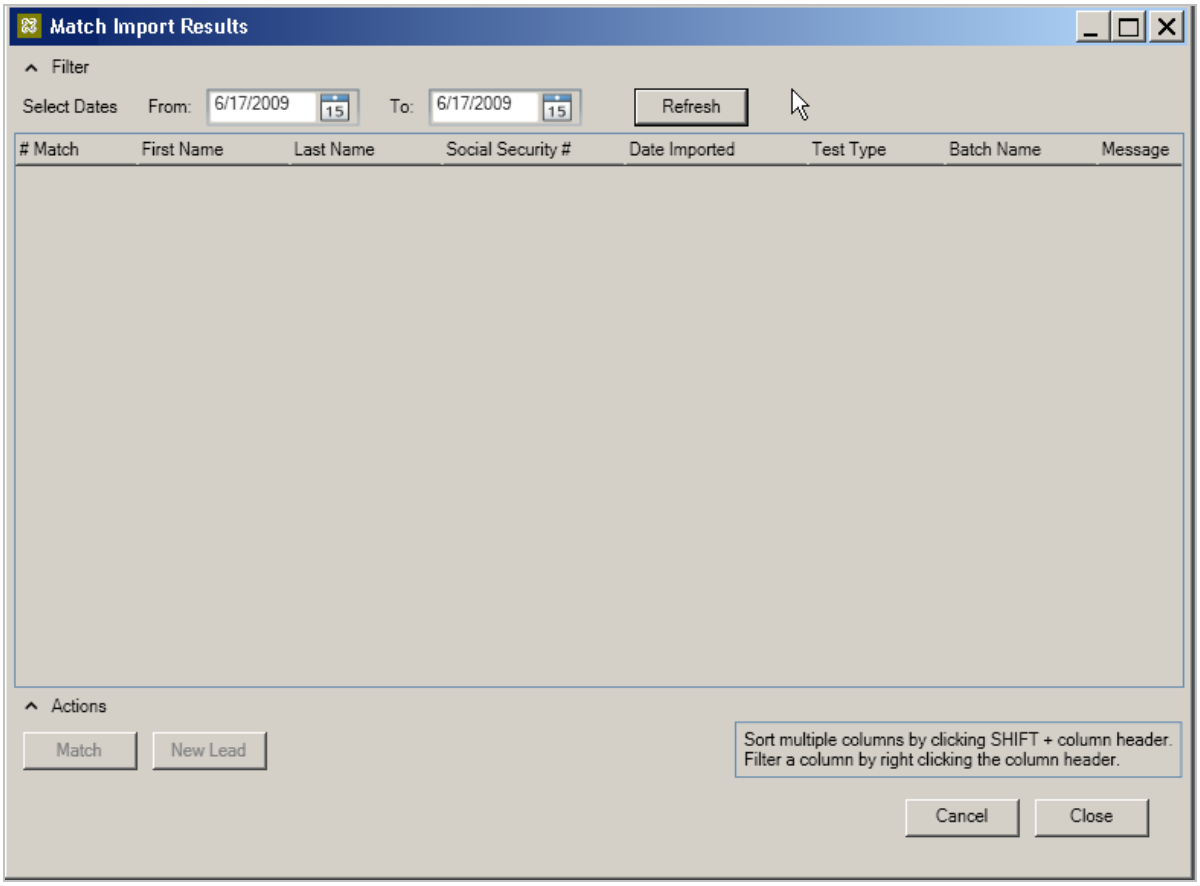
Note: Once the ACT test score is imported and populated for the student, the system will automatically display the '**Equivalent SAT Score**' on the student's **Entrance Tests** form (**View** > **Admissions** > **Tests**).

Match Test Scores

The Test Score Matching option enables you to manually match test scores to students that may not have been matched (because the Create Lead from Test option is off or because there was no record with a matching SSN). Initially, this form will be blank with no records. As soon as you select a date range, you can see all student records imported within that date range.

To view imported test records:

1. Enter the start date range of when the test file was imported into CampusNexus Student in **Select Dates: From**.
2. Enter the end date range of when the test file was imported into CampusNexus Student in **Select Dates: To**.



3. Click **Refresh** to update the list of records displayed on this form.

Note: If you select a student record that is unmatched, both the **Match** and **New Lead** buttons are enabled.

To Match Test Records:

1. Click **Match**. When you select a record where # Match is 0 (an unmatched record) and click **Match**, the student search form will open and you can search for a particular student. When the search form closes after selecting a student, the record in the grid will be matched to that student. This means that the scores of the student in the grid will be inserted into the student record selected. The # Match for the student in the grid will then change to 1 (1 matched test record).
2. Click **New Lead**. The New Lead button is only enabled if you have permissions set to create a new lead in

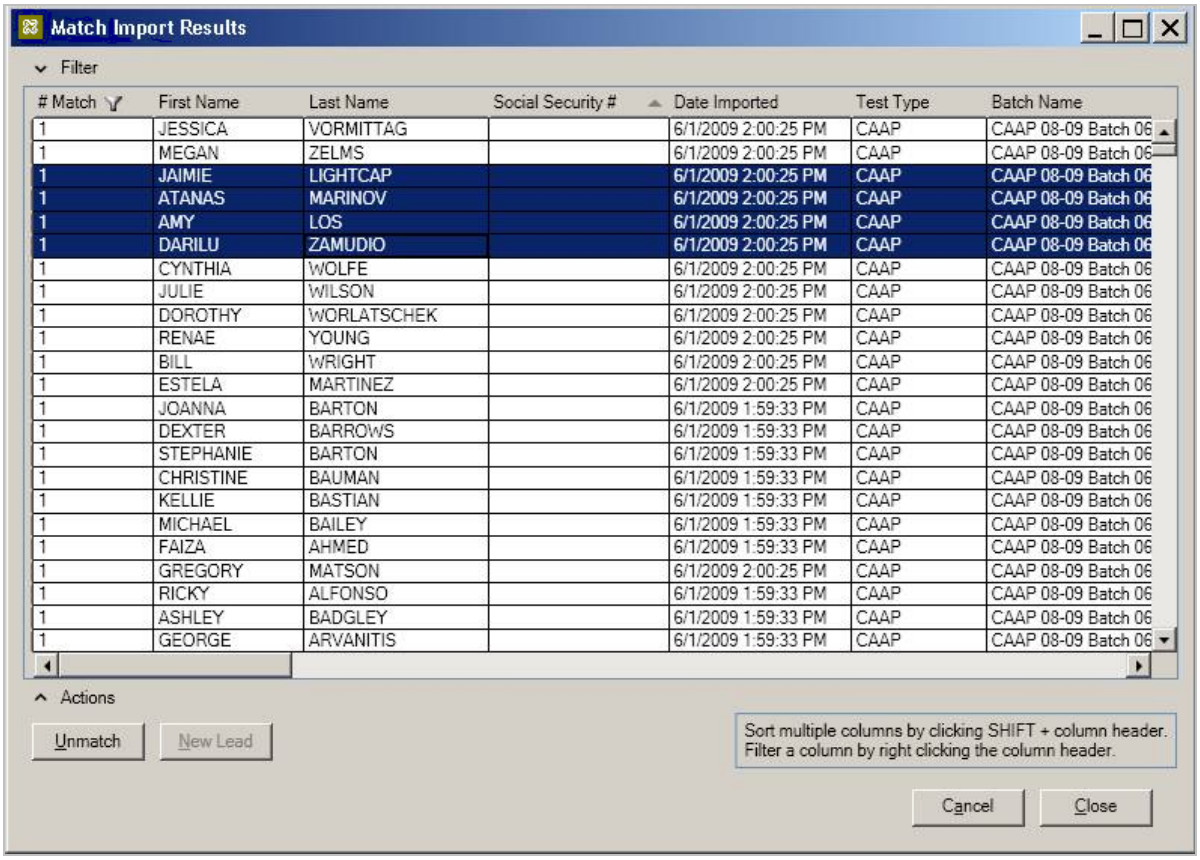
CampusNexus Student. When you select a record having # Match as 0 (an unmatched record) and click New Lead, the data of the student in the grid will be inserted into a new lead record. The scores of the student in the grid will also be inserted into the new students test folder. The # Match for the student in the grid will change to 1 (1 matched test record).

Note: When you try to create a new lead from an unmatched test record,CampusNexus Student checks for the setting **Allow Dup SSNs**. Based on this setting, you can create a new lead record or you will receive a message that you are not allowed to do so due to the following:

- No duplicates allowed in database
- No duplicates allowed in one campus

To Unmatch Test Records:

When you select a record in the grid on the **Match Import Results** form, which already had a **# Match** greater than 0, the '**Unmatch**' button will be enabled and the '**Match**' and '**New Lead**' buttons will be disabled.



When you click **Unmatch**, the test score data of the student in the grid will be removed from the student's test folder. The **# Match** for the student in the grid will change to 0 (an unmatched record).

Note: When you select a row on the grid, additional information about the selected record like Address, Email, Phone, etc. are displayed as a sub-row. You can filter the records on the grid for all the columns being displayed. For example, if you need to filter the records on the basis of the **Test Type** column, you would go to the Test Type column name and right-click. A popup text box will appear on the column header for you to enter the required test type. When you are finished, press the **Enter** key and the records on the grid will be filtered on that test type. This functionality is available for all the columns.

You can also sort by more than one column. To do this, click on the column header while holding down the **Shift** key. A small triangle on the column header is displayed to show that the column is sorted.

Daily > Financial Aid

The Daily > Financial Aid submenu options include:

- Document Tracking
- Approve Packaged Aid
- Approve Disbursements to Pay
- Batch Processing
- Post Work Study Disbursements
- SSCR Process
- Print ISIRs (Batch)
- Review/Print Multiple Batches
- Export Data
- Import Data
- ISIR Matching
- Print Queued Award Letters
- Enter Financial Aid G/L Transaction
- Clear Estimated Awards
- COD Exceptions
- <Detach> (This options detaches the submenu.)

Document Tracking

Institutions request documents from students and persons or organizations connected with the student. Use Document Tracking to keep track of the documents that are necessary for processing student records in an orderly fashion.

Document Tracking is available in the following modules:

- Admissions - AM
- Financial Aid - FA
- Student Accounts - SA
- Academic Records - AD
- Loan Management - LM
- Career Services - PL

You can use the Daily > Document Tracking feature to look at all documents of a certain type to determine the document's status for each student.

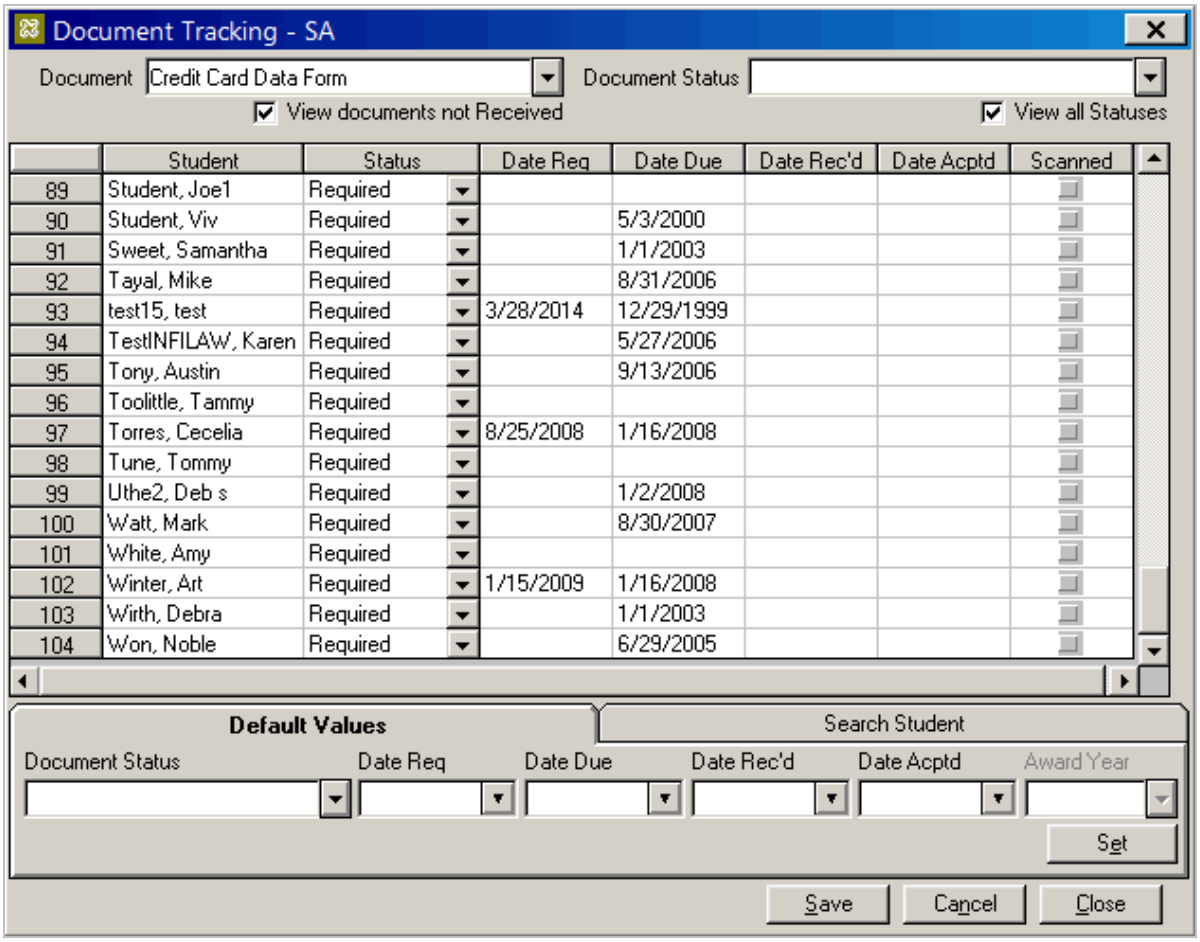
Several documents relate to academic or demographic history and your organization must have copies of them for each student. Examples are birth certificates, driver's licenses, transcripts, alien registration cards, social security cards, etc. Management policy determines which documents are important at your institution.

You can set up lists of these documents and assign them to each student record. You can then record the current status of the documents, the date you requested each document, and the date you received each document. You can also indicate that the document has been scanned into your electronic filing system.

Note: This approach differs from the Document Tracking option that you can access from the View > Contact Manager menu or Student Bar. When you access Document Tracking from the Student Bar, all documents related to a specific student as displayed. Here, you see all students related to a given document.

To edit tracking data for listed documents:

1. Navigate to **Daily > Admissions** (or other module) **> Document Tracking**. The Document Tracking form is displayed.



2. Select a **Document** from the list box at the top of the form. All students having the selected document related to their files are listed on the form.
3. Select or clear **View Documents Not Received**.
   - If the check box is selected, only those documents that have not been received are listed.
   - If the check box is cleared (default), all documents (subject to your Document Status selection) are listed.
4. For Document Tracking in Financial Aid - FA, select an **Award Year** to which the documents apply.

   Note: If you choose a Financial Aid document that does not have the "Award Year Specific" flag selected (indicating Yes) on the Document Setup, the form is displayed with the three Award Year fields disabled.
5. Select or clear **View All Statuses**.
6. Select an optional **Document Status**. If you select a document status, CampusNexus Student lists only the type of document you selected and only those that have the selected status.
7. From the displayed list, find a student document.
8. Click on a field in the row you want to update. You can update the following fields:
   - Status
   - Date Requested
   - Date Received
   - Date Due

- Date Accepted
- Scanned

Note: In date fields, you must enter the century along with the year. For example, 06/30/2000. If you just enter 99 instead of 1999, CampusNexus Student will reject it.

9. Click **Scanned**, if necessary, to indicate that you have scanned the requested document into your electronic filing system.
10. The **Default Values tab** enables you to update statuses and dates in batches.

    If you select a Status, or a Date Due, or Award year, for example, CampusNexus Student updates the values of all students whose names appear in the grid. Click **Set** to update the values and save your work.
11. The **Search Student tab** enables you to search a student using the Social Security Number (SSN) or Student ID.

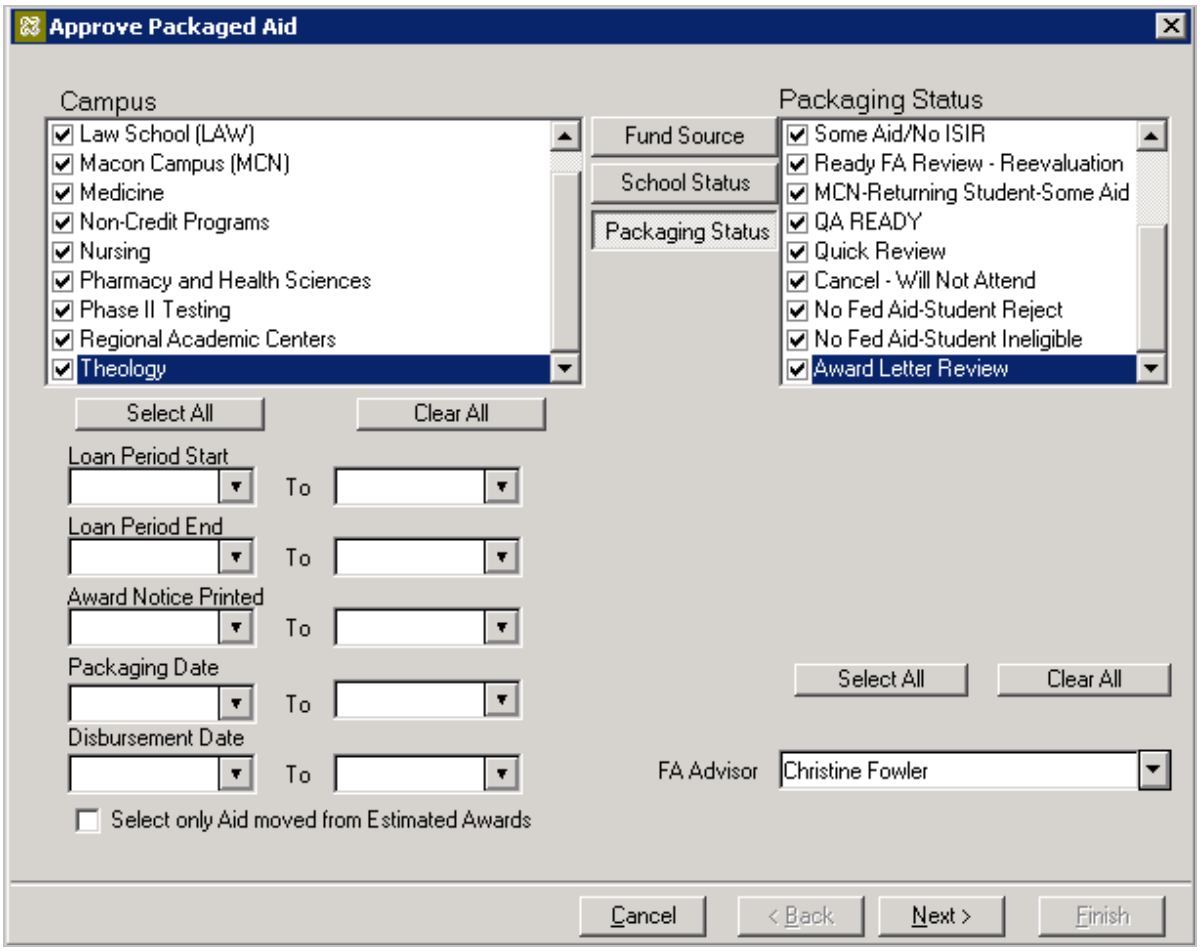
    Type the SSN or ID and click **Filter**. CampusNexus Student finds the student associated with that number and displays only that student's name and information in the grid. Click **Clear Filter** to remove the filter. The grid revert to the previous display of students.
12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Approve Packaged Aid

This is a batch routine for setting packaged financial aid to approved status. The Approve Packaged Aid wizard displays all financial aid grants and loans that have a status of **E - Estimated** and at least one disbursement is scheduled. You can approve the grants and loans using a grid. This option eliminates the need to access students one at a time to change the status of packaged FA from *Estimated* to *Approved*.

To work with the Approve Packaged Aid wizard:

1. Navigate to **Daily > Financial Aid > Approve Packaged Aid**. The first form of the wizard offers selection criteria for the aid to be approved.

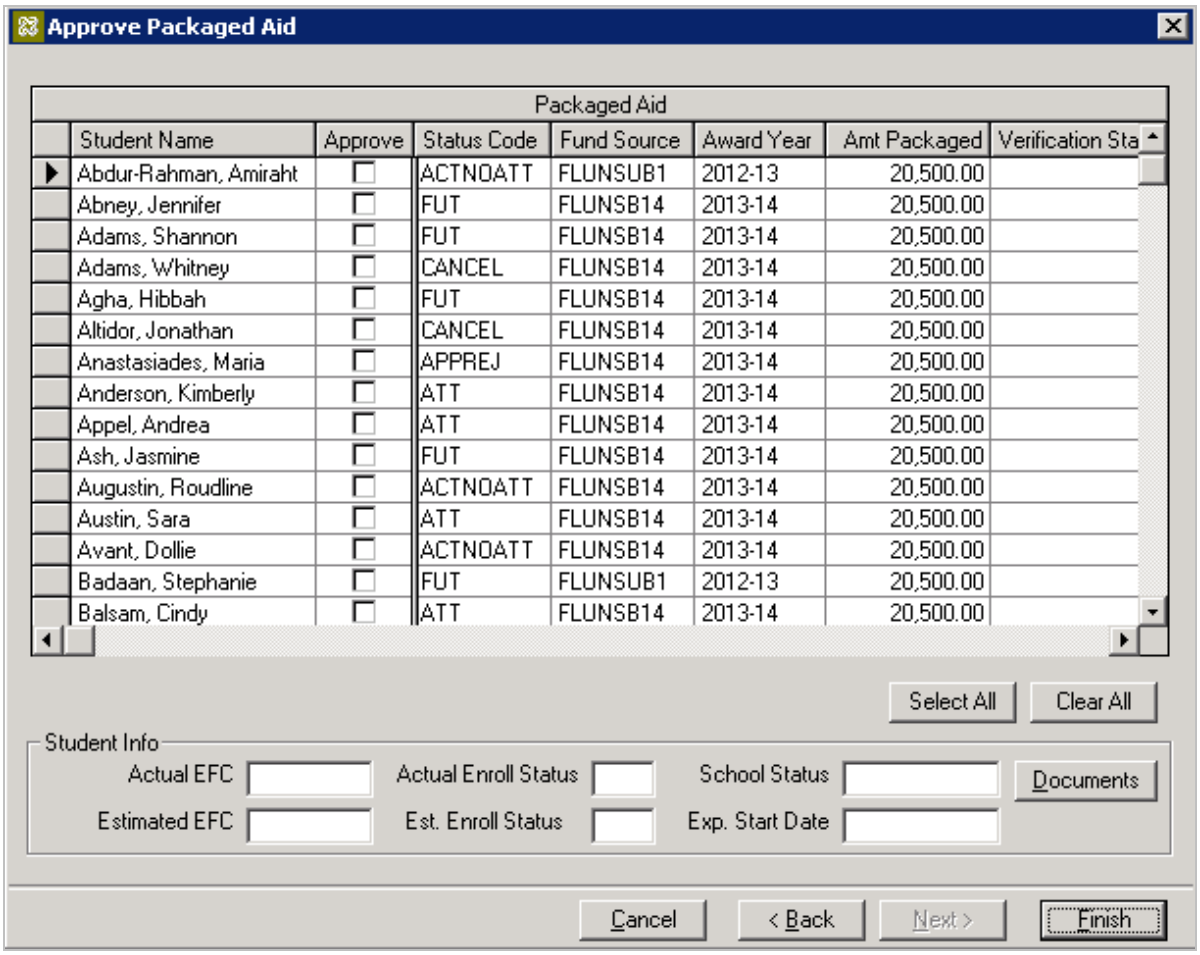


2. Choose appropriate options from the following fields:

   - **Campus** - Select one or more campuses or click **Select All**.
   - **Fund Source** - All fund sources will be listed. Select one or more fund sources or click **Select All**.
   - **School Status** - All School Statuses will be listed. Select one or more school statuses or click **Select All**.
   - **Packaging Status -** All packaging statuses will be listed. Select one or more packaging statuses or click **Select All**.
   - **Loan Period Start Date** - Enter a date range for the loan-period start date.
   - **Loan Period End Date** - Enter a date range for the loan-period end date.
   - **Award Notice Printed** - Enter a date range for the award-notice-printed date.

- **Packaging Date** - Enter a date range for the packaging date.
- **Disbursement Date** - Enter a date range for the disbursement date. This enables you to effectively gather grants.
- **Select only Aid moved from Estimated Awards** - Selected this option to select only those awards that were previously included in Financial Aid Estimates for the selected students.
- **FA Advisor** - To filter the aid packaged by a single, select the advisor from the drop-down list.

3. Click **Next**. The selected student aid awards are displayed in a grid.



A splitter holds the first two columns while you scroll to the right to see the other columns on the grid.

- Student Name
- Approve (Select or deselect each row as appropriate.)
- Status Code
- Fund Source
- Award Year
- Amount Packaged
- Verification Status
- Loan Period Start Date
- Loan Period End Date

4. Select a row on the grid to view **Student Information** in the lower portion of the form. The information displayed includes:

- Actual EFC (estimated family contribution)
- Estimated EFC
- Actual Enrollment Status
- Estimated Enrollment Status
- School Status
- Expected Start Date

5. Click **Documents** to view missing documents related to the student.
6. Select the **Approve** check box for one or more student aid awards or click **Select All**. Click **Clear All** to clear all Approve check boxes.
7. Click **Finish** to update the record set. For the records where you selected the Approve column on the grid, the Status values are set to **A - Approved**. A confirmation message is displayed.

   Note: If you click **Cancel**, the form is closed without saving status changes.

Approve Disbursements to Pay

The Financial Aid Office approves disbursements for payment based on the disbursement schedules of individual students, satisfactory academic progress (SAP), the receipt of funds from the fund sources, and other factors. CampusNexus Student provides an Approve Disbursements Wizard to aid in the approval process. Once the disbursements are approved, the wizard prepares a Disbursement Batch File for processing in the Student Accounts module. In Student Accounts, the Approved Disbursements are posted to the student ledger cards. See Daily > Student Accounts > Post FA Disbursements for more on the posting procedure.

Corporate offices can approve all Pell and Direct Loan Disbursement batches before exporting to the Department of Education (ED). These batches are created by the schools. The corporate office then gathers these disbursements to export to the ED. Once the acknowledgment file is received, rejected disbursements are manually removed from the batch, and the batch is approved and saved for posting by student accounts at the corporate office. This allows for each transfer of funds into the corporate office bank account from ED as a result of an acknowledged disbursement batch equal to the amount represented by the selected FA disbursement batch.

The Approve Disbursements Wizard gathers disbursement information from the disbursement schedules for your review and approval. Only the disbursements you approve are processed. Refer to Third Party or Agency Invoices Approval to approve agency disbursements.

When you approve Pell disbursements or they are actually paid, CampusNexus Student updates the Pell disbursement records as Ready to Send to COD.

If a student is enrolled as a non-term or clock hour student, CampusNexus Student uses different criteria for approvals and auto approvals of financial aid disbursements. Non-term and clock hour students are not eligible to receive financial aid until they have completed the credit hours/weeks attempted during the previous payment period. CampusNexus Student checks if students have completed these credit hours/weeks before allowing financial aid to approve financial aid disbursements and evaluates each payment period individually. This is an automated function in CampusNexus Student.

Disbursements for non-TIV awards can have a DAC policy configured to check for prior payment period completion or exclude the criteria check for prior payment period completion. This is done by enabling the check box for “FA Credits or Clock Hours Earned/Attempted” in conjunction with the corresponding radio button set to “FA Credits/Clock Hours: Earned”. This will allow the “Approve Disbursements to Pay” process to check for prior payment period completion before auto approving a non TIV disbursement that is associated to a payment period. If this setting is not enabled, non TIV disbursements associated to a payment period will not check for prior payment period completion.

In compliance with the regulations specified in the student FSA handbook, if a student is enrolled as a non-term or clock hour student and has a stub loan period (see Packaging for Overlapping Loans), CampusNexus Student does not use completed credits/hours and weeks as criteria when approving direct loan disbursements associated with the stub loan period. Disbursements for direct loans associated with a stub loan period are automatically approved regardless of how many clock/credit hours or weeks of instructional time have been completed (provided that all other criteria have passed validation). This rule does not apply to direct loan disbursements associated with subsequent loan periods. In other words, the student still needs to complete the required clock/credit hours or instructional weeks to receive the disbursements in subsequent loan periods.

For information regarding the updated clock to credit hour conversion rules effective as of July 1, 2011, see Impact of Clock to Credit Conversion Rate on Disbursement Approval.

Miscellaneous Information About Approving Disbursements to Pay

- You can change campuses between batches.
- A batch statistics message is displayed when you click Delete Batch. You can view the batch creation date, the user who last modified the batch, date last modified, disbursement quantity, and the amount approved in the batch. You must confirm batch deletions.
- CampusNexus Student makes the "Paid" column available to update on the Financial Aid Disbursement Batch Detail form immediately after the check box is selected. This saves the data while you are working on the batch

rather than waiting until the entire list has been resolved.

- You can open only one of these forms at a time.
- CampusNexus Student prevents multiple users from editing the same batch simultaneously and prevents the entire batch from being inadvertently deleted. For example, if there are no "approved" disbursements, CampusNexus Student will not clear the unapproved disbursements.
- If your campus is uses a servicer, this procedure prevents you from modifying a servicer disbursement batch (the file import type is S-Servicer). In other words, the flag at Setup > Campus Locations > Financial Aid > Servicer Configuration labeled "Prevent Users from Modifying Title IV Aid?" is set to Yes.
- CampusNexus Student prevents the creation of a new batch of Title IV disbursements if the Prevent flag is Yes. Title IV fund sources will be excluded from the selection list.
- The "Approve Disbursements to Pay" form checks each student selected for a financial aid hold before disbursing financial aid. After populating the grid, when an "on-hold" student is selected in the grid, CampusNexus Student indicates that the student is on "FA Hold" in the "Additional Information" tab. CampusNexus Student will not allow the Approved check box to be selected.
- CampusNexus Student does not allow the amount to be edited when the fund source type is Direct Loan. Verification of total amount packaged is "turned off" when the type is Direct Loan. CampusNexus Student also does not allow editing the amount of an approved FA disbursement when the fund source type is Direct Loan.
- The Disbursements wizard uses logic that compares the student's current enrollment status with the student's 'Packaged To' enrollment status stored in the student's Academic Year. If the two statuses are not equal, an exception occurs preventing a disbursement for the student. For setup information, see Disbursement Approval Criteria.
- The Disbursements wizard uses Enrollment Status Credits or Enrollment Status Hours from the students schedule to determine a student's enrollment status for financial aid purposes. In some cases, these credits or hours may be different than the academic credits or hours that a student has registered for. Additionally, credits associated with a second course retake are not used to determine the student's enrollment status; therefore, the student is not allowed to be paid for a second retake of a previously passed course.

  Example:

  A student is enrolled in 3 courses for the term associated with a Full-Time Payment Disbursement that is being evaluated for payment.

  The student is taking 3 courses in that term. Each course is 4 credits.

  The student previously took 1 one of the courses and was given credit for passing the course.

  The student took the course a second time in a prior term (1st retake) and is taking the course a third time for the term associated with the disbursement being evaluated for payment.

  Since the enrollment status of Full-Time associated with the Pell disbursement is being compared to only the credits associated with the 2 courses and the credits associated with the second retake are not considered, the disbursement fails the evaluation, i.e., the scheduled disbursement is based on a Full-Time status; however, the student's actual enrollment status is ½ time for Title IV aid because the student's actual enrollment status is based on only the 8 credits associated with the other 2 courses and not the retake.
- When a student is dropped from school, CampusNexus Student does not set a disbursement to cancelled status if it is included in an open batch. CampusNexus Student flags a batch as having dropped students and provides the following warning message when the batch is edited, *"This message is for informational purposes only. Students*

included in this batch have been changed to a Dropped status. You may continue to approve and pay these students in this process. Disbursements that are not paid must be manually changed to a ***Cancelled*** *status in the Financial Aid packaging screen."*

- Enrollment status is recalculated when a course gets dropped so that the dropped course is no longer included in the calculation. This is not done by changing the enroll status credits to '0, it is done based on the course status.
- Only students who have met the Financial Aid Document requirements where the document status is set to "approved" can receive Financial Aid disbursements. All Financial Aid documents that are required can be established by assigning the documents to the Financial Aid (FA) module. See Financial Aid Document for setup instructions. If the school has received all required documents (approved document status), CampusNexus Student determines that the student has met the Financial Aid Document requirements and the student can receive disbursements.
- When you create new disbursement batches, you can select Direct Loans based on different origination statuses and promissory note statuses. You can select or clear the following options:
    - Include originated loans only
    - Accepted / Batched
    - Include loans with accepted promissory notes

  These options are displayed for the Direct Loan Fund Type only.
- For fund source type Pell Grant only students whose Origination Status is A or B (originated) can be gathered. This affects schools using the Recipient Financial Management System (RFMS). Schools not using RFMS would leave this box cleared. For Pell Grants, the 'Include originated Pell Grants only' check box appears enabled. It can be disabled by clicking on the check box. The options Accepted and Batched are displayed for the Pell Grant fund type only.
- **Note**: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

Course Retake Logic and Non-Term Payment Periods

The Approve Disbursements to Pay logic ensures that credit associated with a course is only counted once for determining whether a student has successfully completed previous non-term payment periods and is therefore eligible to receive the next disbursement.

Example:

A student must complete 12 credits to advance to the subsequent payment period and takes 3 courses at 4 credits each.

If the student earns credit for the first 2 courses, but the 3rd course is a retake of one of those courses, the student is considered to have completed 8 (not 12) credits for Title IV purposes.

The Approve Disbursements to Pay logic does not allow a student to receive a disbursement for the next (13-24 credit) payment period until the student successfully completes another 4 required credits (in courses for which the student has not previously earned credit) and the weeks defined for the current payment period.

The Approve Disbursements to Pay logic also ensures that attendance associated with a retake course in which credit was previously earned is not used for determining whether a student has attendance in the non-term payment period and is therefore eligible to receive the next disbursement.

If a student is enrolled as a non-term or clock hour student and has a stub loan period, CampusNexus Student does not use completed credits/hours and weeks as criteria when approving direct loan disbursements associated with the stub loan period.

Course Retake Logic and Term Payment Periods

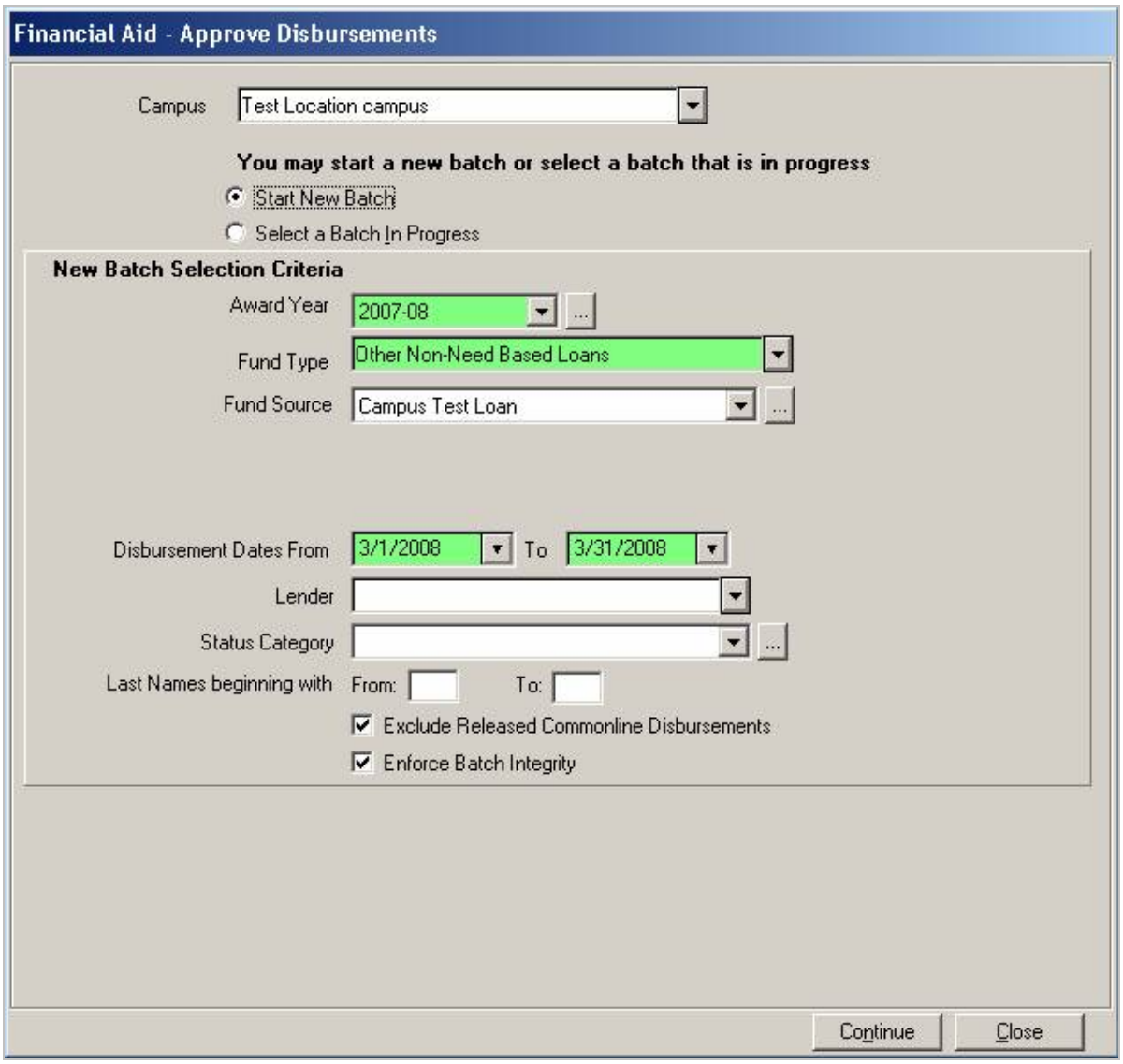
The Approve Disbursements to Pay logic ensures that credit associated with a course is only counted once for determining whether a student has successfully completed previous term payment periods and is therefore eligible to receive the next disbursement.

Credits associated with a second course retake are not used to determine the student's enrollment status. Therefore, the student is not allowed to be paid for a second retake of a previously passed course.

An institution may pay for unlimited retakes of failed classes in term based programs of study, but may not pay for courses for which a student has previously been given credit. An institution may pay for one retake of any previously passed course (except not if due to the student failing previous courses).

To Approve Disbursements to Pay:

1. Navigate to **Daily** > **Financial Aid** > **Approve Disbursements to Pay**. The Financial Aid Approve Disbursements wizard is displayed.



2. Select the **Campus** for which disbursements must be approved.

3. Select **Start New Batch** to create a new batch and proceed to the New Batch Selection Criteria instructions.
   - OR -
   Select **Select a Batch In Progress option** to process an existing batch and proceed to the Batch in Progress instructions.

New Batch Selection Criteria

You can filter the batch through the following options:

1. Select an **Award Year** or click to select multiple award years. If the selected award year is associated with a fund source that is deactivated, the fund source will not appear in the Fund Source drop-down list.
2. Select the **Fund Type**. The Fund Type option gives you the opportunity to approve all fund sources of a particular type. For instance, you can approve all Scholarships at once.

   Note: The Fund Type of **Other Outside Resources** is an option only if you selected **Reduces Remaining Balance to Schedule** in the Fund Source Code Setup form.
3. Select the **Fund Source**. You can select all fund sources for the type, or select a specific fund source.

   The Fund Source list contains the fund sources for the type selected. If there is only one fund source for the type, it is selected by default. If there is more than one fund source for a type, the default is to approve ALL fund sources of that type.

   The form displays different options depending on the Fund Type and Fund Source:

   - For a direct loan fund source, you can select **Include originated loans only**, **Accepted**, or **Batched**. When you clear the 'Include originated loans only' check box, the Accepted and Batched options are cleared automatically.
   - For loans with accepted promissory notes, you can select **Include originated loans only** and **Batched** status, and out of those, include only the loans with accepted promissory notes. When selecting a new fund source, you must click the **Award Year** field for these check boxes to display. All check boxes are selected by default.
   - For a direct loan fund source, you can select **Informed Borrower**. Selecting this ensures that the system gathers disbursements for Direct Loan awards (Direct Sub, Direct Unsub, Direct PLUS) where the student has Informed Borrower data saved in the system for award year 2020-21 or higher. If this check box is cleared, Informed Borrower details for Direct Loans are not referenced when the system determines which disbursements to include in the batch.
   - For a Pell Grant fund source, you can select **Include originated Pell Grants only**, **Accepted**, or **Batched**. When you clear the 'Include originated Pell Grants only' check box, the Accepted and Batched options are cleared automatically.
4. Select the **Disbursement Dates**. This is a required field.
5. Select the **Lender** or leave the field blank to include all lenders.
6. Select the **Status Category**. You can select one or more status categories (except **Applicant**, **Lead**, or **Placement**) to include in the batch. Only students having the selected status category or categories will be included in the batch.
7. Specify letters in the **From** and **To** fields to select a range of students whose last names begin with a letter that falls within the selected range.
8. Select **Enforce Batch Integrity** if you intend to create sub batches of disbursements, for example, if you plan to

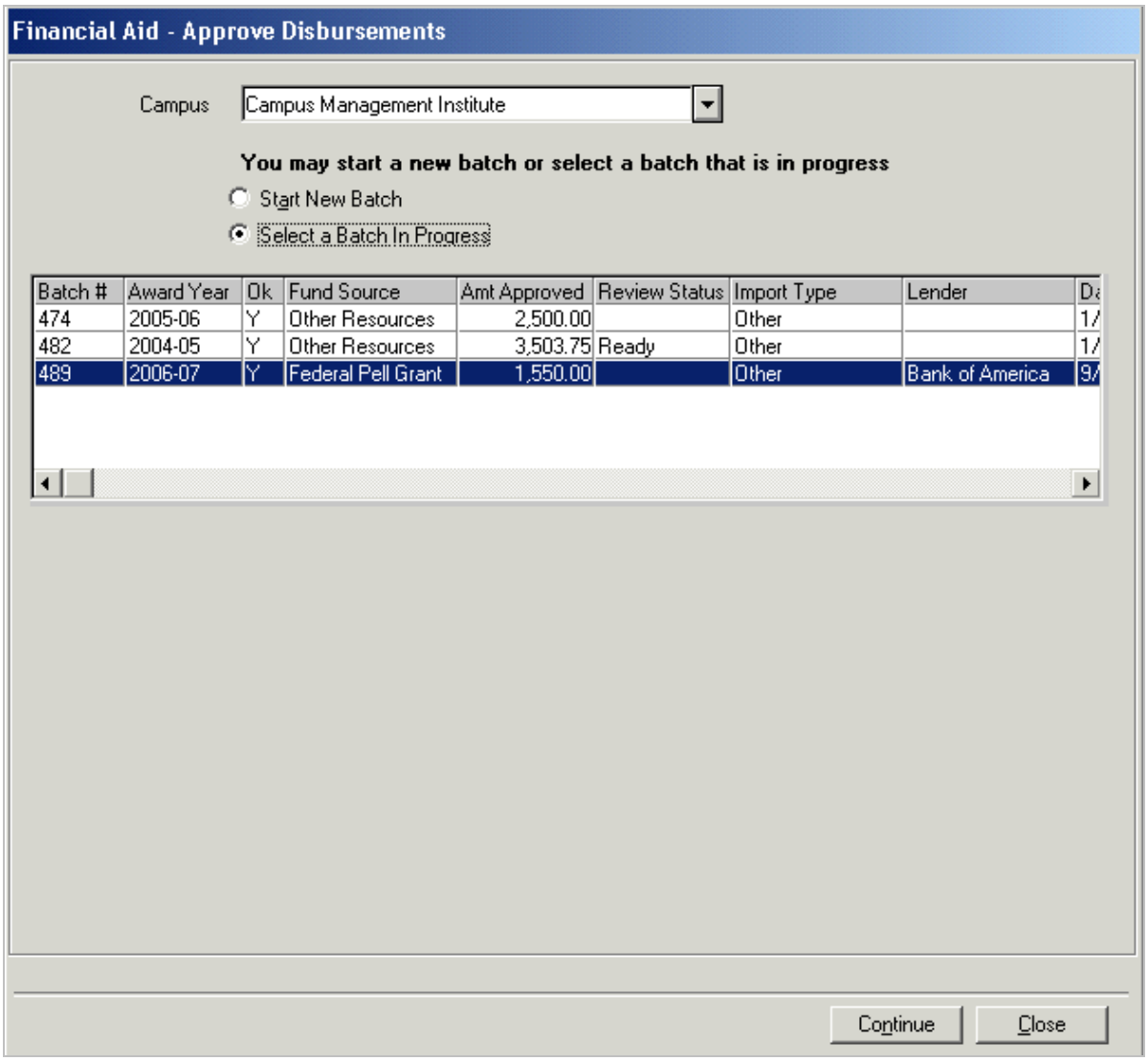
move successful approvals to Student Accounts as a separate batch but need to keep track of the original parent disbursement batch. When batch integrity is enforced, CampusNexus Student maintains a record of the initial contents of Financial Aid disbursement batches created from importing a Global payment (C2PA) file. This functionality is also available for manually created disbursement batches.

Note: The record of the initial contents of financial aid disbursement batches is separate from the record of the posting batch number assigned to the disbursements posted to student ledger cards.

9. Click **Continue**. Proceed to Approve Disbursements.

Batch in Progress

1. Select the batch by clicking a row in the grid and proceed to Approve Disbursements.

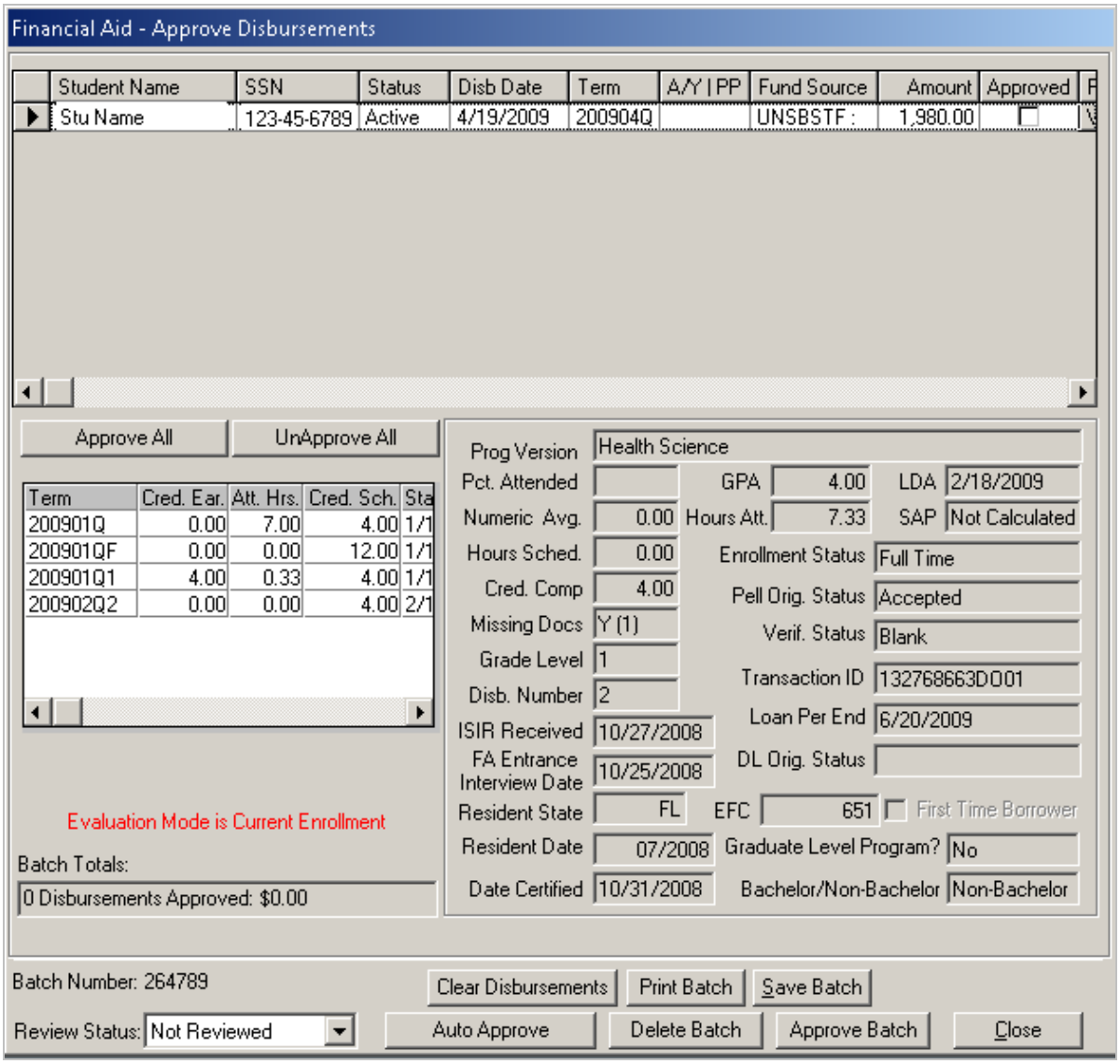


Approve Disbursements

The disbursement approval criteria rely on the Student Pace Evaluation (SPE) tool to manage the disbursement dates. The SPE tool adjusts the dates of a payment period and ensures that all credits/hours and weeks have been met before the next payment period starts for a student. The Approve Disbursements to Pay form approves the disbursement when the date of the disbursement is equal to the current date.

1. CampusNexus Student displays a list of students who are scheduled for a disbursement based on the criteria you selected in the previous steps. If no disbursements match the selection criteria, a message states that there are no disbursements, and the wizard displays the first page again.
2. Click a disbursement row in the grid to see details about the selected student. The form displays data about the student.

   'Evaluation Mode in Current Enrollment' is displayed in red as Current Enrollment or Term based on the approval criteria being used.



3. To approve disbursements manually, select a disbursement record in the grid and select the **Approved** check box for that record.

   To automatically approve the disbursements, click the **Auto Approve** button. If the button is not available, the campus, fund source, or disbursement approval criteria have not been configured. The Auto Approve functionality compares each disbursement against the associated disbursement approval criteria for the fund source. Auto Approve uses the payment periods at the individual student level to determine academic progress.

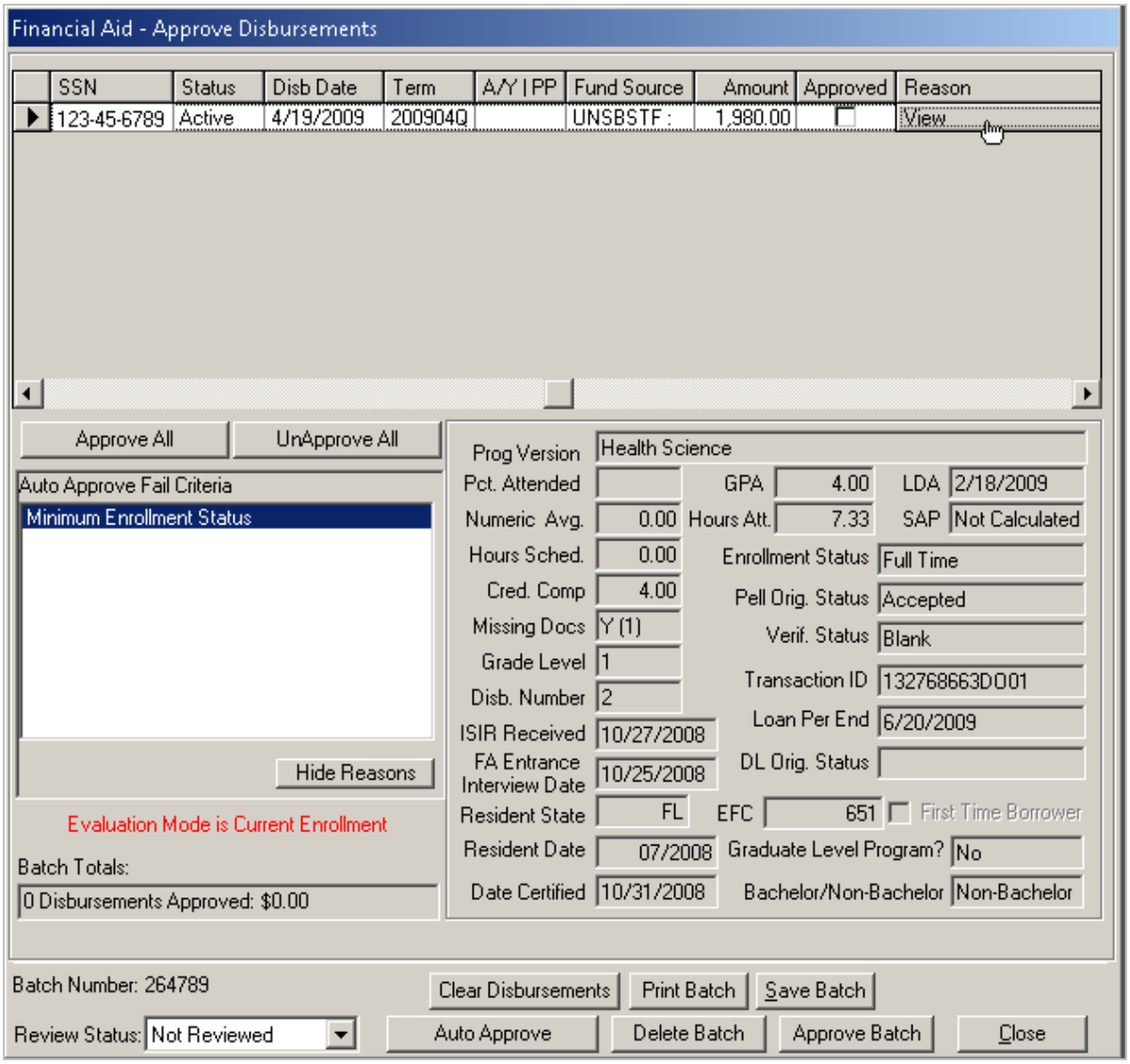
Auto Approve automatically selects the Approved check box for the records satisfying the approval criteria. If the check box is not selected, that record failed the approval criteria. The sum of the approved disbursements is displayed under Batch Totals along with the total number of approved disbursements.

Note: The Academic Year|Payment Period (A/Y|PP) column uses the following notation for Payment Periods: `A<n>|P<m>` where `<n>` is the academic year sequence number and `<m>` is the payment period sequence number.

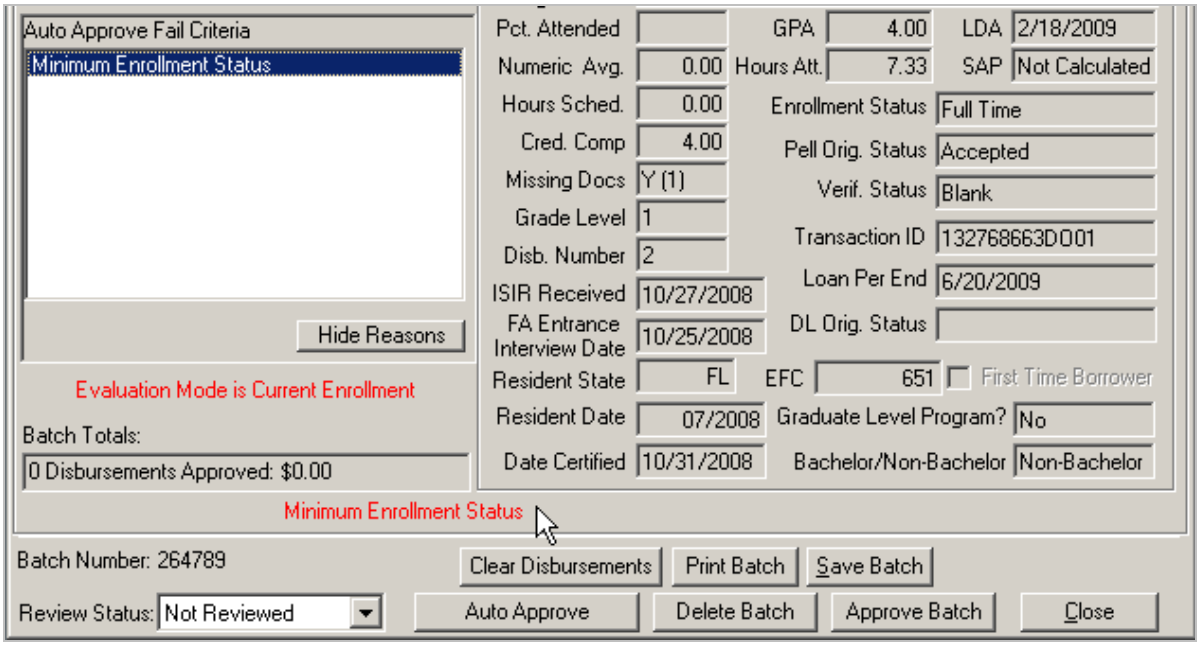
If a student is enrolled as a non-term or clock hour student and has a stub loan period, CampusNexus Student does not use completed credits/hours and weeks as criteria when approving direct loan disbursements associated with the stub loan period (see Packaging for Overlapping Loans).

4. If there are failed criteria, CampusNexus Student displays a Reason column to the right of the Approved column. Click **View** in the Reason column to see the reason(s) disbursement failed. A list of reasons is displayed in the Auto Approve Failed Criteria box.
5. When the Disbursement Approval Criteria flag "Originated/Certified before LDA" is activated, the "Date Certified" column header is displayed for Fund Source types: SUB, UNSUB, PLUS, PERKINS, LOANNB, and LOANNNB. "Orig. Extract Sent" is displayed as a column header for DIRSUB, DIRUNSUB, and DIRPLUS Fund Source types.

   If the Auto-Disbursement Approval criterion is configured for a loan that is being Auto-Approved, CampusNexus Student determines if a student withdrew before the loan was Originated/Certified. If this is true, the loan disbursement is *not* Auto Approved. The failed reason "Originated / Certified before LDA" is displayed in the Auto Approve Fail Criteria box.



Note: Click on a reason listed in the Auto Approve Fail Criteria box to view the full reason text in red in a label area spanning the full width of the form (see figure below). This is helpful when reason texts have been truncated due to space limitations.



Note 1: The Disbursement will fail if the Fund Source for the disbursement is not set up in the disbursement approval criteria. See Disbursement Approval Criteria for additional information.

Note 2: The Disbursements will fail for the "First Time Borrower 30 day rule", only under the following two conditions:

a. If the "First Time Borrower 30 day rule" from Disbursement Approval Criteria (DAC) configuration is on
   - AND the Fund Type is SUB,UNSUB, DIRSUB, DIRUNSUB
   - AND the student is a first time borrower
   - AND the valid term is associated with the disbursement that is being paid
   - AND the term is the first term of the enrollment
   - AND the disbursement is the first disbursement of the year
   - AND disbursement scheduled date is less than 30 days from student's academic year start date.

b. If no term is associated with the disbursement that is being paid.

When approving disbursements to pay for students, the **EFC** field in the detail section of the loan displays the Pell EFC from the award year associated with the fund source being disbursed.

The **Missing Docs** field displays **Y** or **N** to indicate whether the student is missing documents. If **Y**, the number of missing documents is displayed in parentheses. If the DAC policy associated to the fund source is not configured to check for “Missing Documents”, the field will report the Award Year specific documents for the student that are assigned a document status with the “Approved” flag = N. However the missing documents will not prevent the disbursement from auto-approving and will not report as a fail criteria. If the DAC policy associated to the fund source is configured to check for “Missing Documents”, the field will report the documents configured in the DAC policy “Missing Documents” form and are assigned a document status with the “Approved” flag = N for the student. The missing documents will prevent the disbursement from auto-approving and will report as a fail criteria.

An authorized user can specify the financial aid documents that will be checked when disbursements are evaluated against the Disbursement Approval criteria. Because different disbursement approval criteria can be associated with different fund sources, a school can have different lists of financial aid documents checked within the approval criteria for different fund sources when disbursements are auto-approved.

The **Approve All** button selects all student records in the disbursement form (this batch) for approval, and the **UnApprove All** button clears all students in the form (or batch). A check mark in the box next to each record indicates that the record is selected for the current batch. Batch totals for the total number of approvals and the monetary amount are updated to include the records selected.

Click **Lock Batch** to lock these students into a batch for batch integrity. The batch must be locked to activate Batch Integrity on a manually created branch. **Note:** You cannot unlock a batch once it has been locked, although you will still be able to run Auto Approve disbursements for these students.

Note 4: Once you have selected **Lock Batch**, the **Clear Disbursements** and **Delete Batch** options will be disabled.

6. Click **Clear Disbursements** to remove one or more unapproved disbursements from the batch. CampusNexus Student display a form to allow you to choose a single disbursement or all unapproved disbursements for clearing.
7. In the Clear Disbursements dialog box, select **Single Disbursement** to clear the disbursement in the text box or select **All Unapproved disbursements in the batch.** Click **OK** to confirm.
8. The Clear Disbursement button prompts you to clear the selected disbursement OR clear all unapproved disbursements in the batch. This eliminates the student record from the display and the record set so that the student is no longer associated with the batch. On Save, or Approve (where necessary), CampusNexus Student updates the totals to show the new record counts and amount totals. If a record already exists in the FA Disb Batch Detail table for the scheduled disbursement and Batch ID, CampusNexus Student deletes that record as well. CampusNexus Student also resets the status in the FA Schedule table to S.
9. Click **Print Batch** to print the FA Disbursements Batch Tracking report.

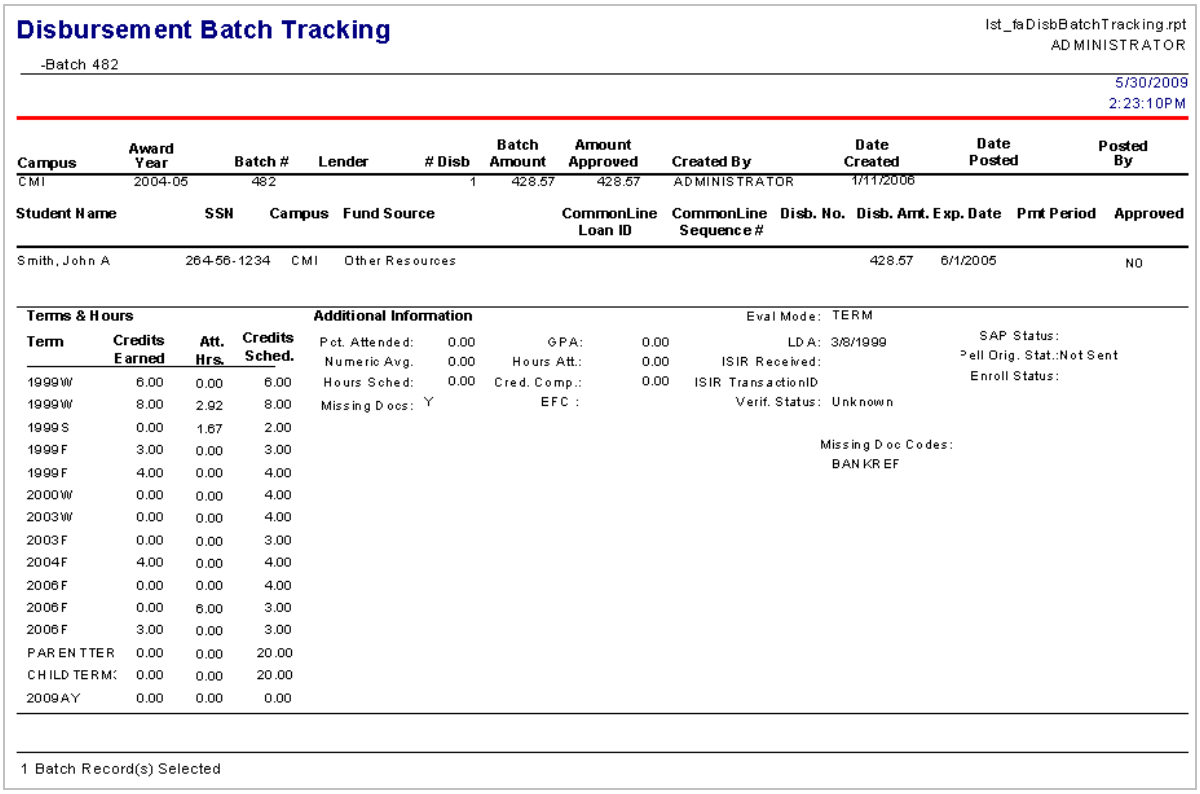
   Note: Since the FA Disbursement Batch Tracking report can include students from various campus locations, administrators can to view the summary total by campus location. In addition, the original batch total is provided on the report so that administrators can see that the original batch total included more disbursement records.

   Administrators may not view student disbursement records that are associated with campus locations to which they do not have permissions.
10. Click **Yes** when you are prompted to save the batch before printing the report,. Where a disbursement is not approved, all reasons for failure appear on the report.

    Details on this report include Campus, Award Year, Batch #, Lender, # Disb, Batch Amount, Amount Approved, Created By, Date Created, Date Posted, Posted By, Disbursement Number, Terms & Hours, and Additional Information.

    If any students in this batch are missing documents, a field labeled Missing Docs is included in the Additional Information area. Document Codes for all missing documents, by student, are shown in the Missing Doc Codes field. Report details can be exported to Excel.

    Unapproved batches appear as follows:



Disbursement Batch Tracking

lst_faDisbBatchTracking.rpt
ADMINISTRATOR
5/30/2009
2:23:10PM

-Batch 482

Campus	Award Year	Batch #	Lender	# Disb	Batch Amount	Amount Approved	Created By	Date Created	Date Posted	Posted By
CMI	2004-05	482		1	428.57	428.57	ADMINISTRATOR	1/11/2006		

Student Name	SSN	Campus	Fund Source	CommonLine Loan ID	CommonLine Sequence #	Disb. No.	Disb. Amt.	Exp. Date	Pmt Period	Approved
Smith, John A	264-56-1234	CMI	Other Resources				428.57	6/1/2005		NO

Terms & Hours

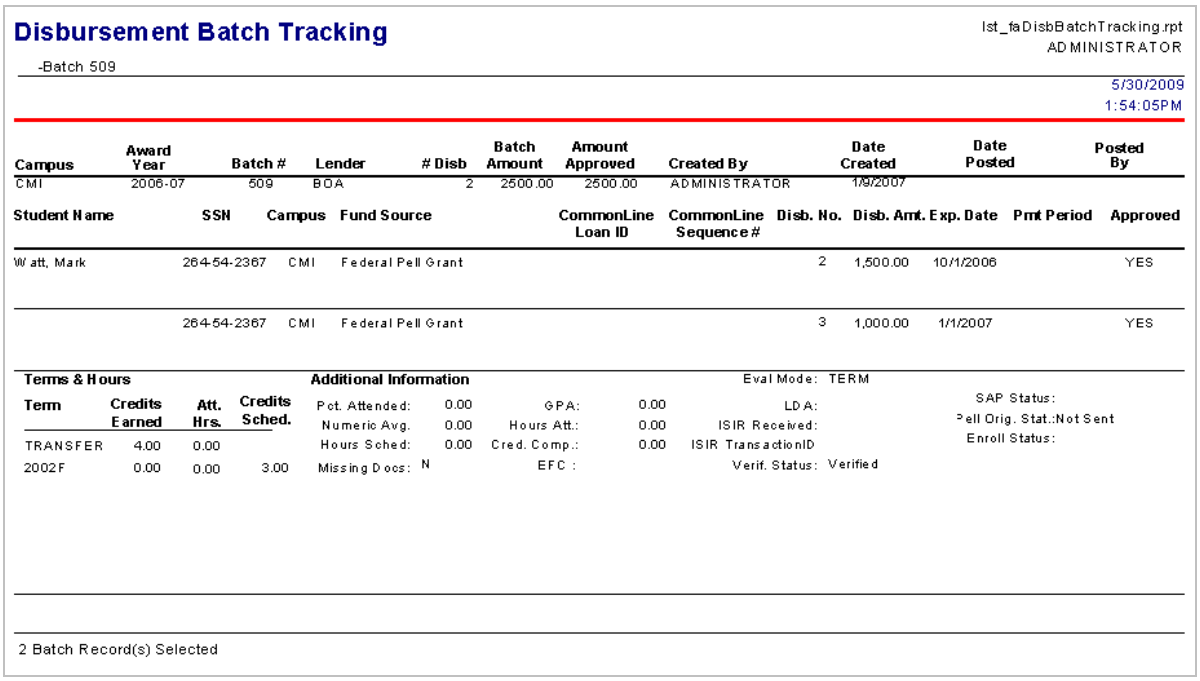
Term	Credits Earned	Att. Hrs.	Credits Sched.
1999W	6.00	0.00	6.00
1999W	8.00	2.92	8.00
1999S	0.00	1.67	2.00
1999F	3.00	0.00	3.00
1999F	4.00	0.00	4.00
2000W	0.00	0.00	4.00
2003W	0.00	0.00	4.00
2003F	0.00	0.00	3.00
2004F	4.00	0.00	4.00
2006F	0.00	0.00	4.00
2006F	0.00	6.00	3.00
2006F	3.00	0.00	3.00
PARENTTER	0.00	0.00	20.00
CHILDTERM	0.00	0.00	20.00
2009AY	0.00	0.00	0.00

Additional Information

Pct. Attended: 0.00 | GPA: 0.00 | Eval Mode: TERM
Numeric Avg. 0.00 | Hours Att.: 0.00 | LDA: 3/8/1999
Hours Sched: 0.00 | Cred. Comp.: 0.00 | ISIR Received:
Missing Docs: Y | EFC : | ISIR TransactionID
Verif. Status: Unknown
Missing Doc Codes: BANKREF
SAP Status:
Pell Orig. Stat.:Not Sent
Enroll Status:

1 Batch Record(s) Selected

Approved batches appear as follows:



Disbursement Batch Tracking

lst_faDisbBatchTracking.rpt
ADMINISTRATOR
5/30/2009
1:54:05PM

-Batch 509

Campus	Award Year	Batch #	Lender	# Disb	Batch Amount	Amount Approved	Created By	Date Created	Date Posted	Posted By
CMI	2006-07	509	BOA	2	2500.00	2500.00	ADMINISTRATOR	1/9/2007		

Student Name	SSN	Campus	Fund Source	CommonLine Loan ID	CommonLine Sequence #	Disb. No.	Disb. Amt.	Exp. Date	Pmt Period	Approved
Watt, Mark	264-54-2367	CMI	Federal Pell Grant			2	1,500.00	10/1/2006		YES
	264-54-2367	CMI	Federal Pell Grant			3	1,000.00	1/1/2007		YES

Terms & Hours

Term	Credits Earned	Att. Hrs.	Credits Sched.
TRANSFER	4.00	0.00	
2002F	0.00	0.00	3.00

Additional Information

Pct. Attended: 0.00 | GPA: 0.00 | Eval Mode: TERM
Numeric Avg. 0.00 | Hours Att.: 0.00 | LDA:
Hours Sched: 0.00 | Cred. Comp.: 0.00 | ISIR Received:
Missing Docs: N | EFC : | ISIR TransactionID
Verif. Status: Verified
SAP Status:
Pell Orig. Stat.:Not Sent
Enroll Status:

2 Batch Record(s) Selected

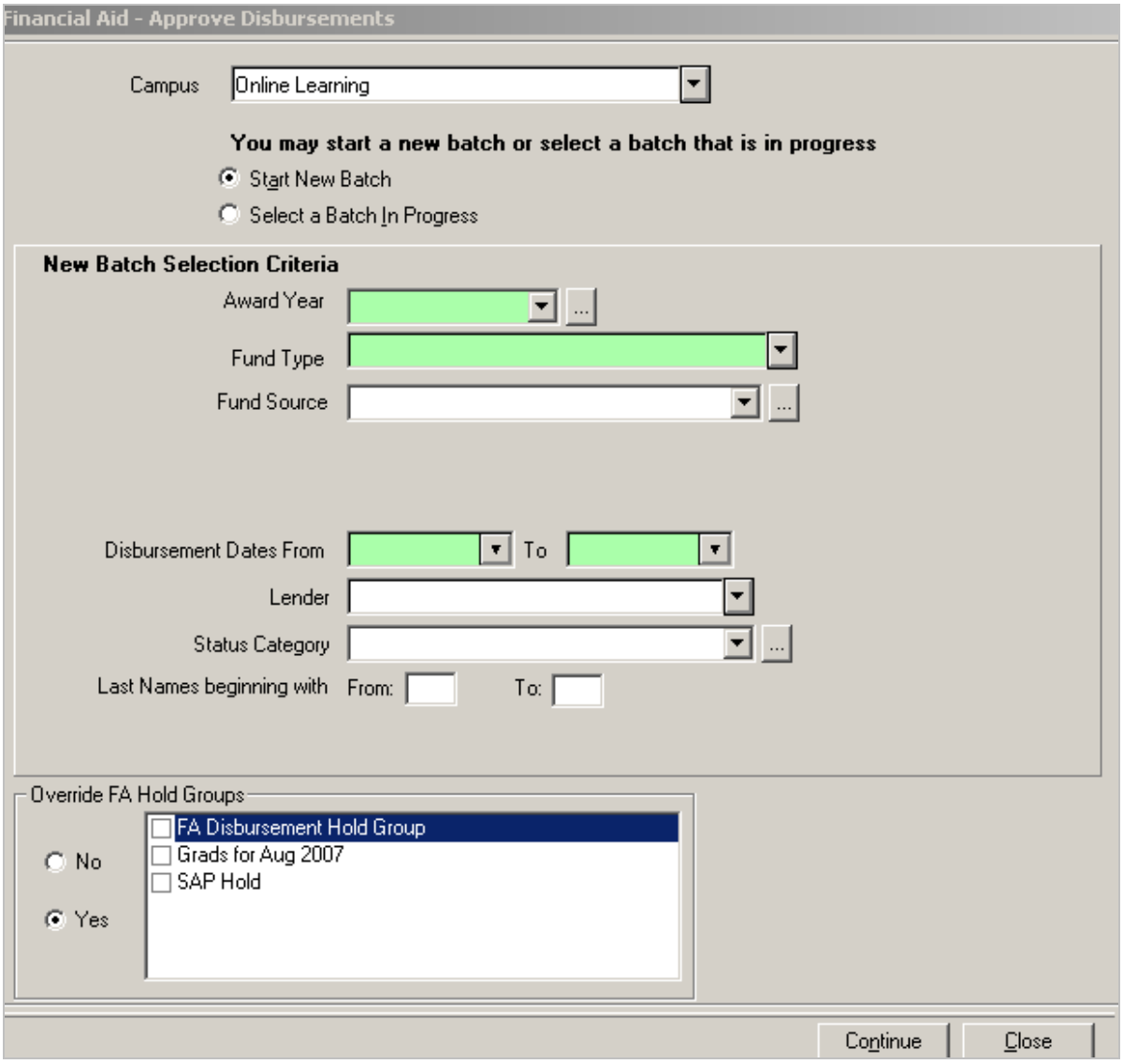
11. Click **Save Batch** to save the batch of disbursements for further review. You can revisit the batch later by selecting it in Step 7. A confirmation message is displayed.
12. Click **Cancel Batch** to abandon the disbursement approval process. The batch is discarded. You will have to start

over at a later date. A confirmation message is displayed.

13. Click **Approve Batch** to complete the processing of the current batch. CampusNexus Student prompts you to confirm the approval. Click **Yes**.
14. When CampusNexus Student finishes the approval processing, it returns to the first page of the wizard. From there you can change campus, start a new batch of approvals, select another batch, or **Close** the form.

Override FA Hold Groups

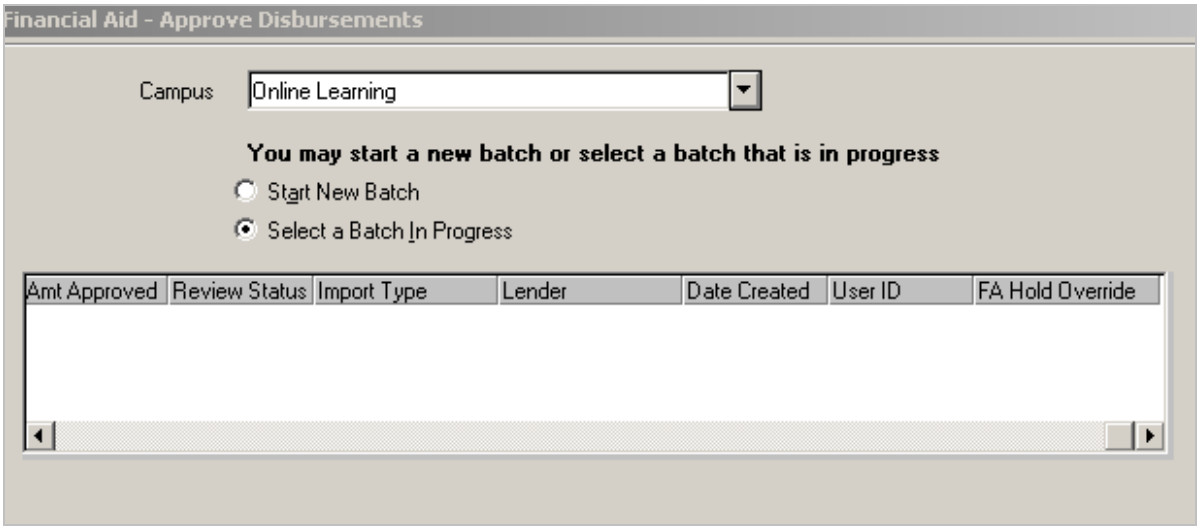
Designated financial aid officers can override FA Hold Groups to process disbursements for previous or future terms for students who may be failing disbursements. If this function has been enabled, the designated financial aid officers will see the option to override FA Hold groups at the bottom of the Approve Disbursements screen:



To approve disbursements without overriding Financial Aid holds, select **No**.

To approve disbursements for students in designated Financial Aid hold groups, select **Yes**, and select the hold groups to override. CampusNexus Student's Approve Disbursements for Pay logic evaluates students in those groups to determine whether their financial aid disbursements should be approved or disapproved for other reasons.

Note: If you choose to work on a batch in progress, the Override FA Hold Groups option will not automatically appear. The Override FA Hold Groups option is displayed **only** if you enter a **Y** in the **FA Hold Override column**, which is the final column option to the right when you **Select a Batch in Progress.**



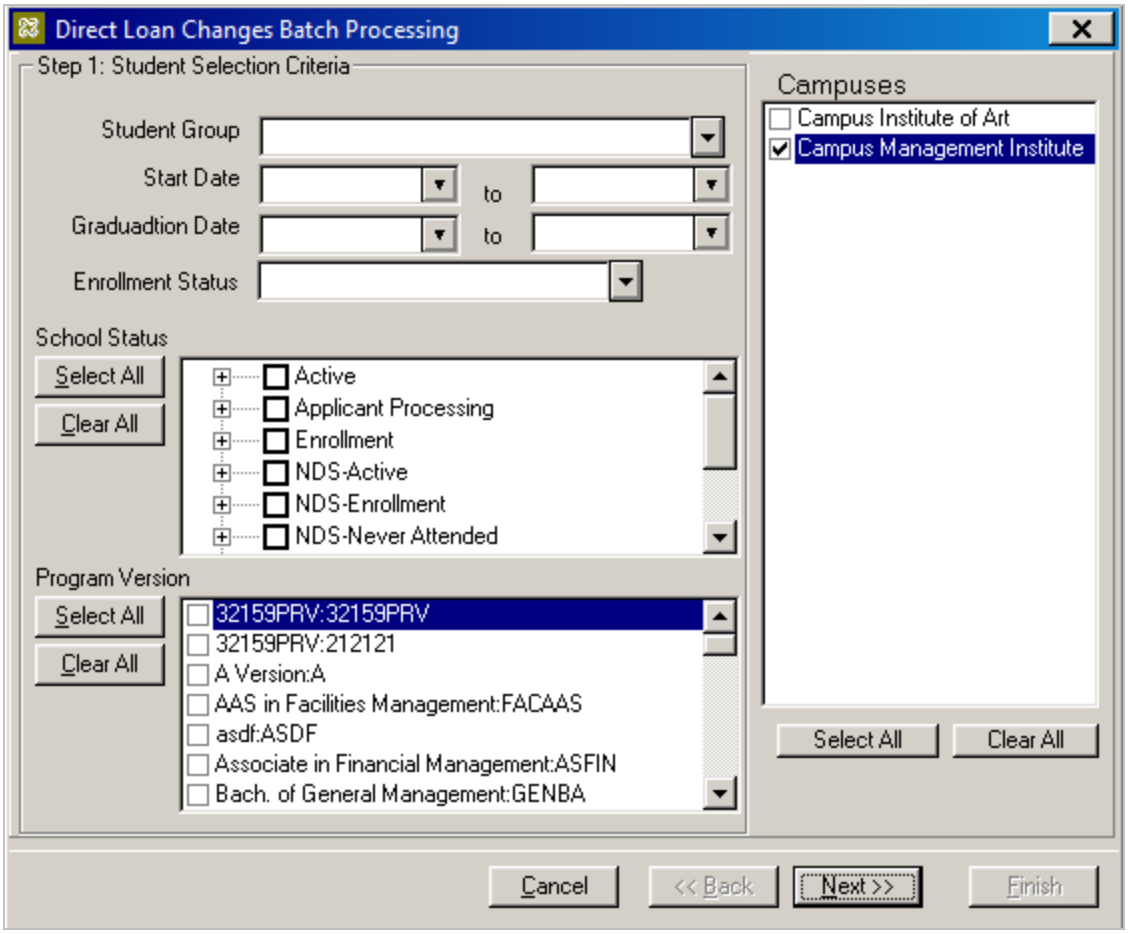
Direct Loan Changes Batch Processing

You may make changes to Direct Loans in a batch mode.

Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

To make changes to Direct Loans:

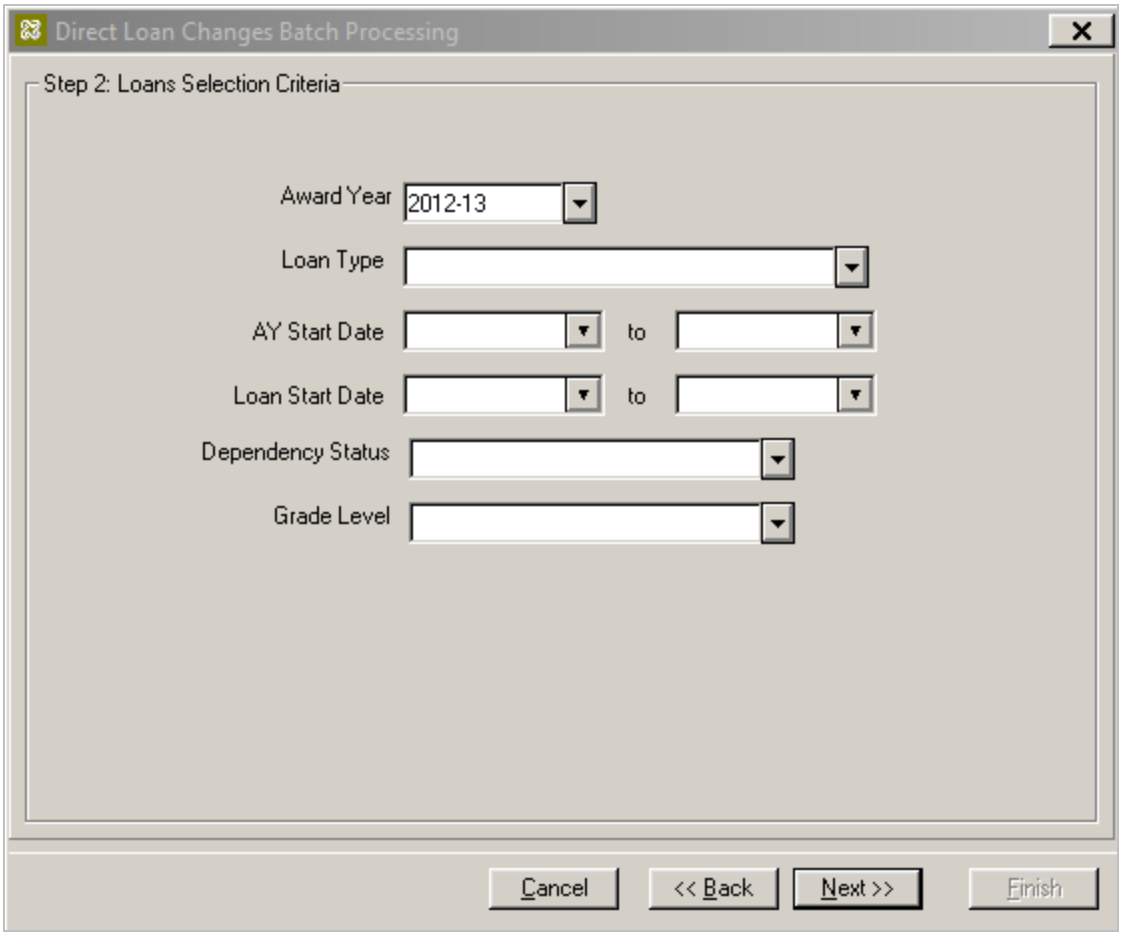
1. Navigate to **Daily > Financial Aid > Batch Processing > Direct Loan**. The Direct Loan Changes Batch Processing form is displayed on the Step 1: Student Selection Criteria page.



2. Select a **Student Group** from the drop-down list.
3. Select a **Start Date** and **to** date from the drop-down lists.
4. Select a **Graduation Date** and **to** date from the drop-down lists.
5. Select an **Enrollment Status** date from the drop-down list.
6. Select the applicable **Campuses**. Use the Select All button to select all campuses, or the Clear All button to cancel the selection of all campuses.
7. Select a **Program Version**. Use the Select All button to select all program versions, or the Clear All button to

cancel the selection of all program versions.

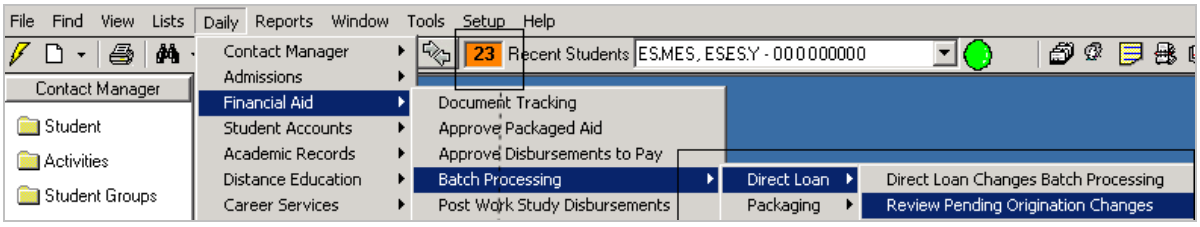
8. Click the **Next** button. The **Step 2**: **Loans Selection Criteria** form is displayed.



9. Select the **Award Year** from the drop-down list.
10. Select the **Loan Type** from the drop-down list.
11. Select an **Academic Year (AY) Start date** and **to** date from the drop-down lists.
12. Select a **Loan Start date** and **to** date from the drop-down lists.
13. Select the **Dependency Status** from the drop-down list.
14. Select the **Grade Level** from the drop-down list.
15. Click the **Next** button.
16. Follow the prompts until the **Finish** button becomes active to complete the process.

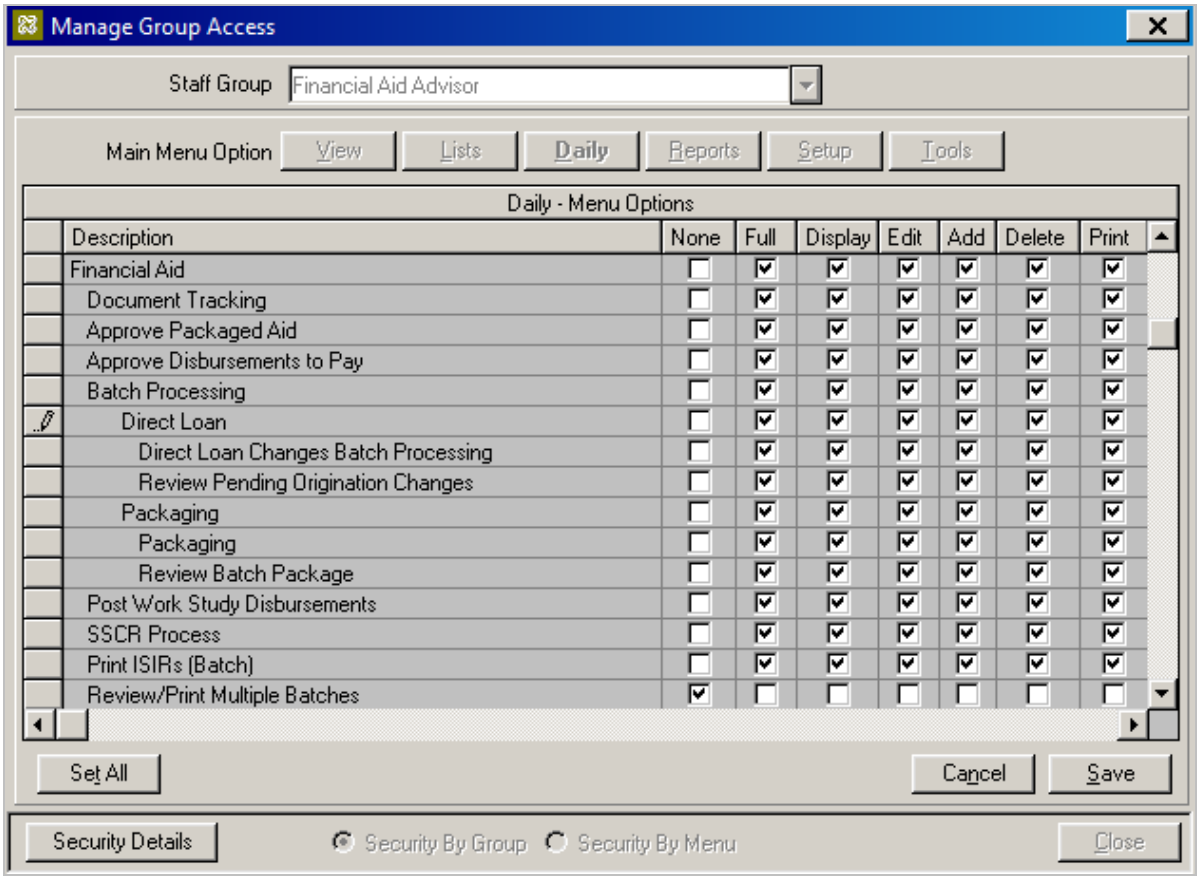
Review Pending Origination Changes

Navigate to **Daily > Financial Aid > Batch Processing > Direct Loan > Review Pending Origination Changes**. Notice that next to the Recent Students field a label with background color displays the number of pending origination change records. This number is based on the user's campus permission. This label is visible only if the Financial Aid Advisor Allow Origination flag is set to 'True' in the System Registry and the user has been set up to be notify of changes. If the user has no permission to the Review Pending Origination Changes form, then when the user clicks on the icon a pop up message box will appear stating 'You do not have permission to view this form. Please contact your system administrator.'



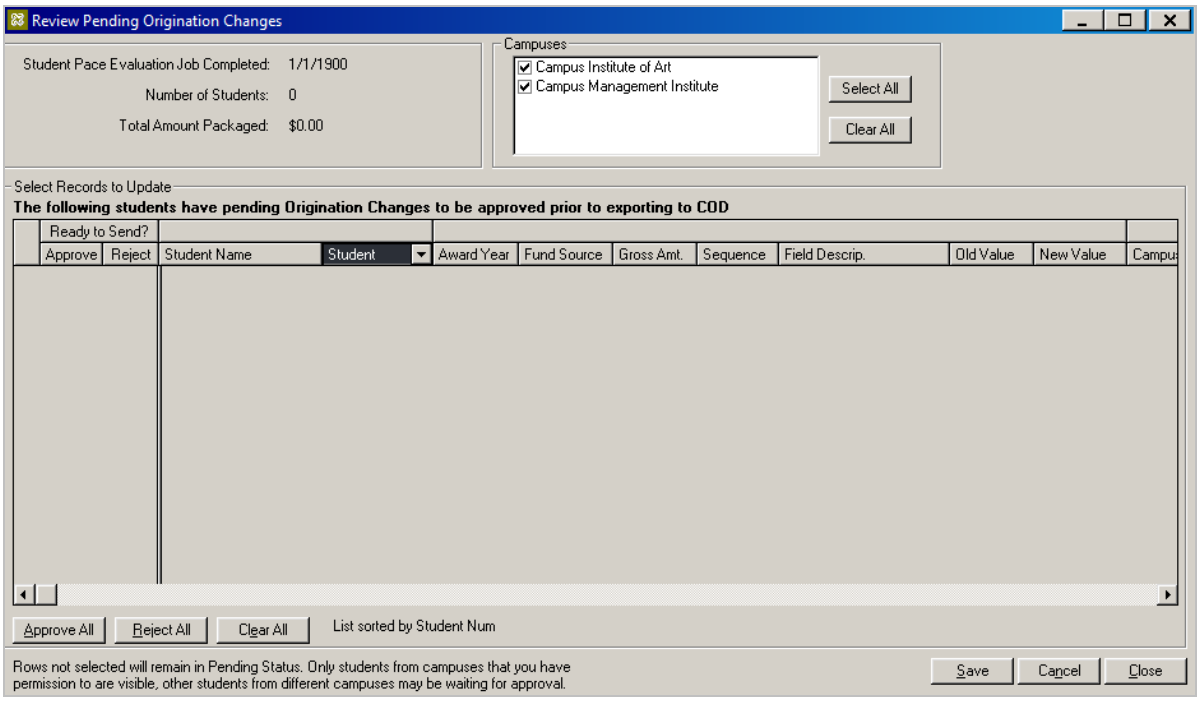
Security

Notice that the menu item 'Review Pending Origination Changes' is displayed under Direct Loan. Security was automatically added when the Review Pending Origination Changes menu was added. By default, security access defined for Direct Loan for all Groups has been applied to the Review Pending Origination Changes menu item. Additionally, the Direct Loan form configuration has been applied to the Review Pending Origination Changes menu.



Review Pending Origination Changes Form

When the Review Pending Origination Changes form opens, the top of the form displays the **Student Pace Evaluator Job Completed** date, **Number of Students** reported, and the **Total Amount Packaged** figure Campuses displayed in the **Campuses** section are only the campuses to which the user has access. The **Select All** button allows the user to select all campuses listed, and the **Clear All** button clears all the check boxes selected.



The **Select Records to Update** section displays all the pending origination changes done by the Student Pace Evaluator (SPE) in the grid. Each row in the grid represents an origination change, and it contains the following information about each origination change: Ready to Send? Accept and Reject check boxes, Student Name, Student Num, Award Year, Fund Source, Gross Amt., Sequence, Field Descrip, Old Value, New Value, Campus, Program Version Description, Start Date, and Date Added.

Note: Only students from campuses to which the user has permission will be visible. Students from different campuses may still be waiting for approvals.

Users can approve or reject the pending origination changes listed by selecting the **Approve** or **Reject** check box next to the student's name, and then clicking the **Save** button to keep their selections. Users can also click the **Approve All** button to select all pending origination changes in the grid to keep or click the **Reject All** button to reject all the pending origination changes in the grid. All Approved records are gathered and sent to COD in the next Export, whereas all the Rejected records are permanently removed from the list of Pending Origination Changes. Rows not selected will remain in Pending Status.

Clicking **Clear All**or **Cancel** resets all selections to their original settings. If the user clicks **Close**, the application will close; if this button is clicked while changes are being made, the user will have the opportunity to save the changes before closing.

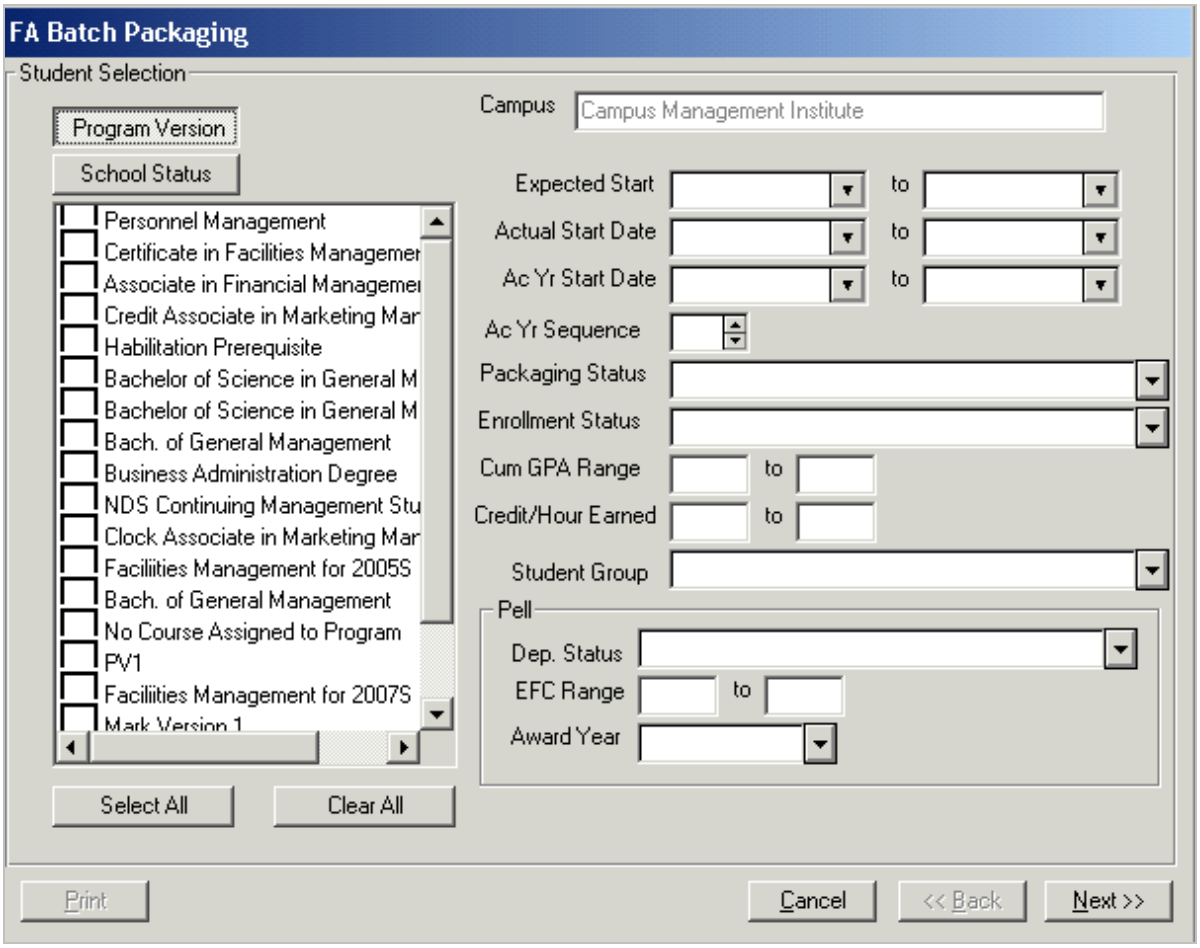
Packaging Financial Aid

FA Batch Packing involves two steps. First, you select the students and set up batch packing criteria. Then, you package the financial aid using one of two methods:

- Use Auto-Package
- Create FA Package

To set up batch packaging:

1. Navigate to **Daily** > **Financial Aid**, **Batch Processing > Packaging > Packaging**. The FA Batch Packaging form is displayed.



2. Select appropriate packing criteria:

FA Batch Packaging Criteria

Packaging Criteria	Selection
Program Version	From this list select all that apply.
School Status	From this list select all that apply.
Expected Start Date	From each of the menus select the from and to date range.
Actual Start Date	From each of the menus select the from and to date range.
Academic Year Start Date	From each of the menus select the from and to date range.
Academic Year Sequence Number	Choose the sequence number.
Packaging Status	The current packaging status of the students you are packaging.
Enrollment Status	The current enrollment status of the students you are packaging. • Q - 3/4 Time • F - Full Time • H - Half Time • L - Less than half time
Cum GPA Range	Enter the grade point average from and to range.
Credit/Hour Earned	Enter the credit or hour earned from and to range.
Student Group	Select a student group from the menu.
Dependency Status	Select Dependent or Independent.
EFC Range	Enter the expected family contribution (EFC) range.
Award Year	If an EFC range or Dependency status is used, the award year is required.

3. Click **Next**. The packaging methods are displayed. Select Use Auto-Package or Create FA Package.

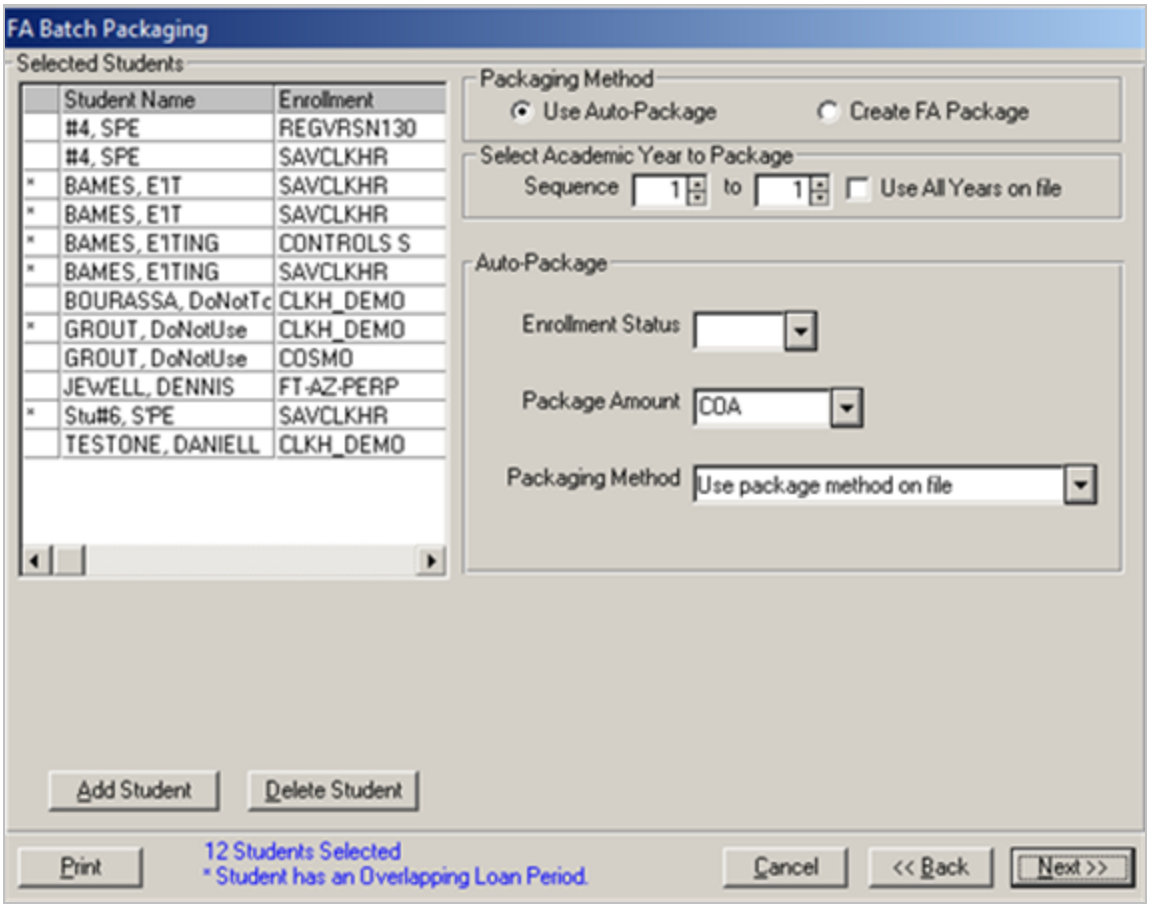
Use Auto-Package

When *Use Auto-Package* is selected and a disbursement schedule is configured as a required field, CampusNexus Student checks if a disbursement schedule exists for the selected Academic Year where the fund source has a 'Begin AY Start Date' and 'End AY Start Date'. If no disbursement schedule is found, the student is added to the exception report. The new exception is displayed in the Exception column.

You can create a new financial aid package for all students selected in the batch setup step above. The package can be assigned only to students in a specific AY Sequence or all AY Sequences on file by leaving the AY Sequence 0.

If any of the students gathered for batch packaging have an overlapping loan period for the academic years included, an asterisk is displayed in the first column next to each student's name and a message stating that the student has an overlapping loan period is displayed under the number of students selected.

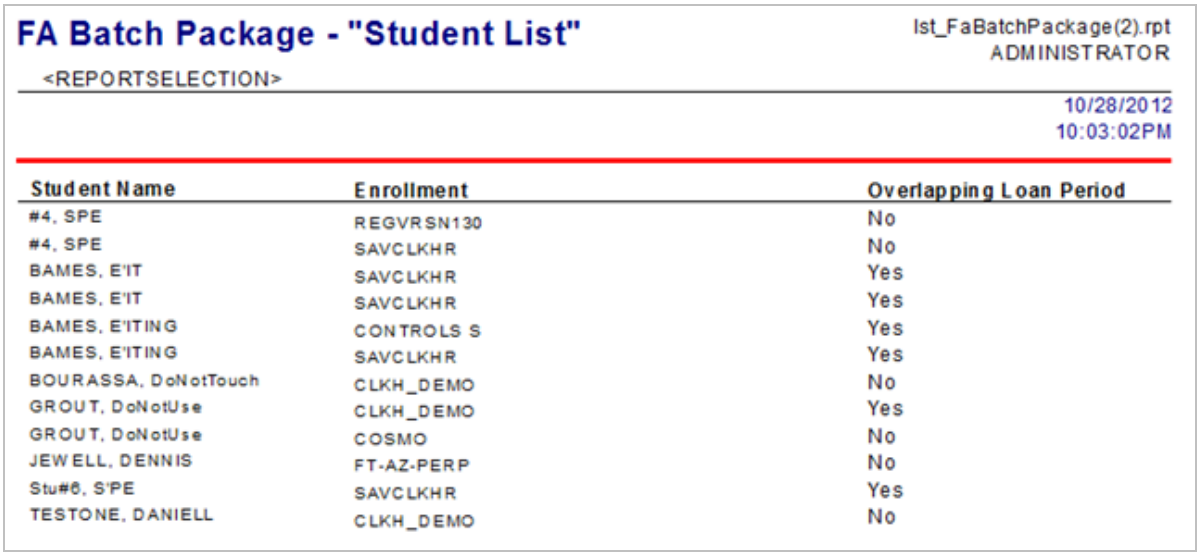
1. In the *Select Academic Year to Package* section, select a specific **AY** to package or select **Use All Years on file**.



2. Select the **Enrollment Status** for the financial aid package, such as:
    - X - Use Status on file.
    - Q - 3/4 Time
    - F - Full Time
    - H - Half Time
    - L - Less than half time
3. Select the **Package Amount**, such as:
    - Cost of Attendance (COA)
    - Institutional Charge
4. Select the **Packaging Method**, such as:
    - Use package method on file
    - Auto-Award - SFAA
    - FBF12 36CR/40WK/4PP - FBSF12
    - Manual
5. Click **Add Student** to add a student to the batch. If student who is being added to the list has an overlapping loan period, an asterisk (*) is placed next to the student's name in the first column of the grid.
6. Click **Delete Student** to remove the selected student from the batch.

7. Click **Print** to display the Report Selection: FA Batch Package - "Student List" form and select report criteria.

   The report displays the Student Name, Enrollment, and Overlapping Loan Period columns. For every student listed on the report, if the student has an Overlapping Loan Period, *Yes* appears in the Overlapping Loan Period column; if the student does not have an Overlapping Loan Period, *No* appears in the Overlapping Loan Period column.



FA Batch Package - "Student List"

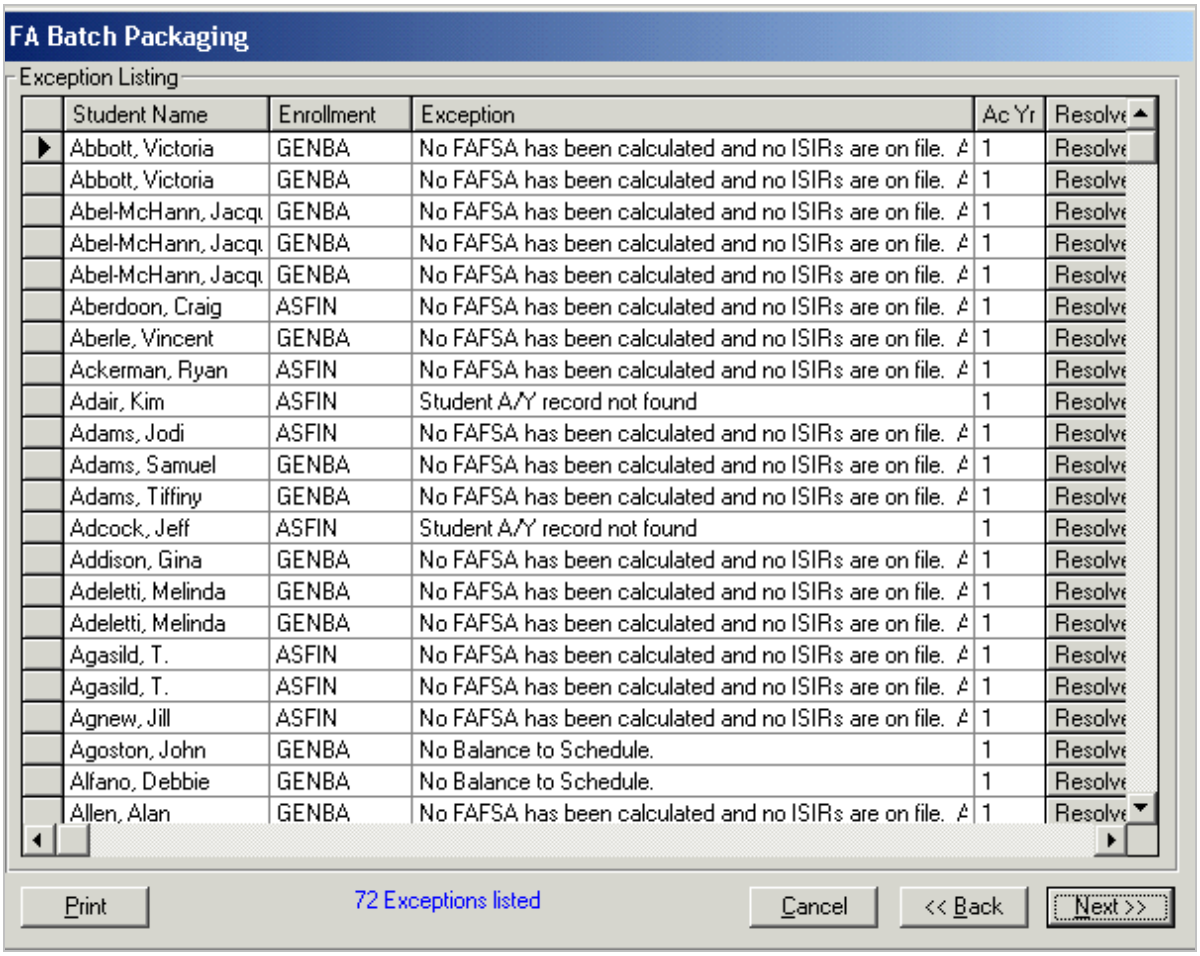
lst_FaBatchPackage(2).rpt
ADMINISTRATOR

<REPORTSELECTION>

10/28/2012
10:03:02PM

Student Name	Enrollment	Overlapping Loan Period
#4, SPE	REGVRSN130	No
#4, SPE	SAVCLKHR	No
BAMES, E'IT	SAVCLKHR	Yes
BAMES, E'IT	SAVCLKHR	Yes
BAMES, E'ITING	CONTROLS S	Yes
BAMES, E'ITING	SAVCLKHR	Yes
BOURASSA, DoNotTouch	CLKH_DEMO	No
GROUT, DoNotUse	CLKH_DEMO	Yes
GROUT, DoNotUse	COSMO	No
JEWELL, DENNIS	FT-AZ-PERP	No
Stu#6, S'PE	SAVCLKHR	Yes
TESTONE, DANIELL	CLKH_DEMO	No

8. Click **Next**. An Exception list shows students and the exceptions found. If no exceptions are found, the packing wizard moves to the next step.



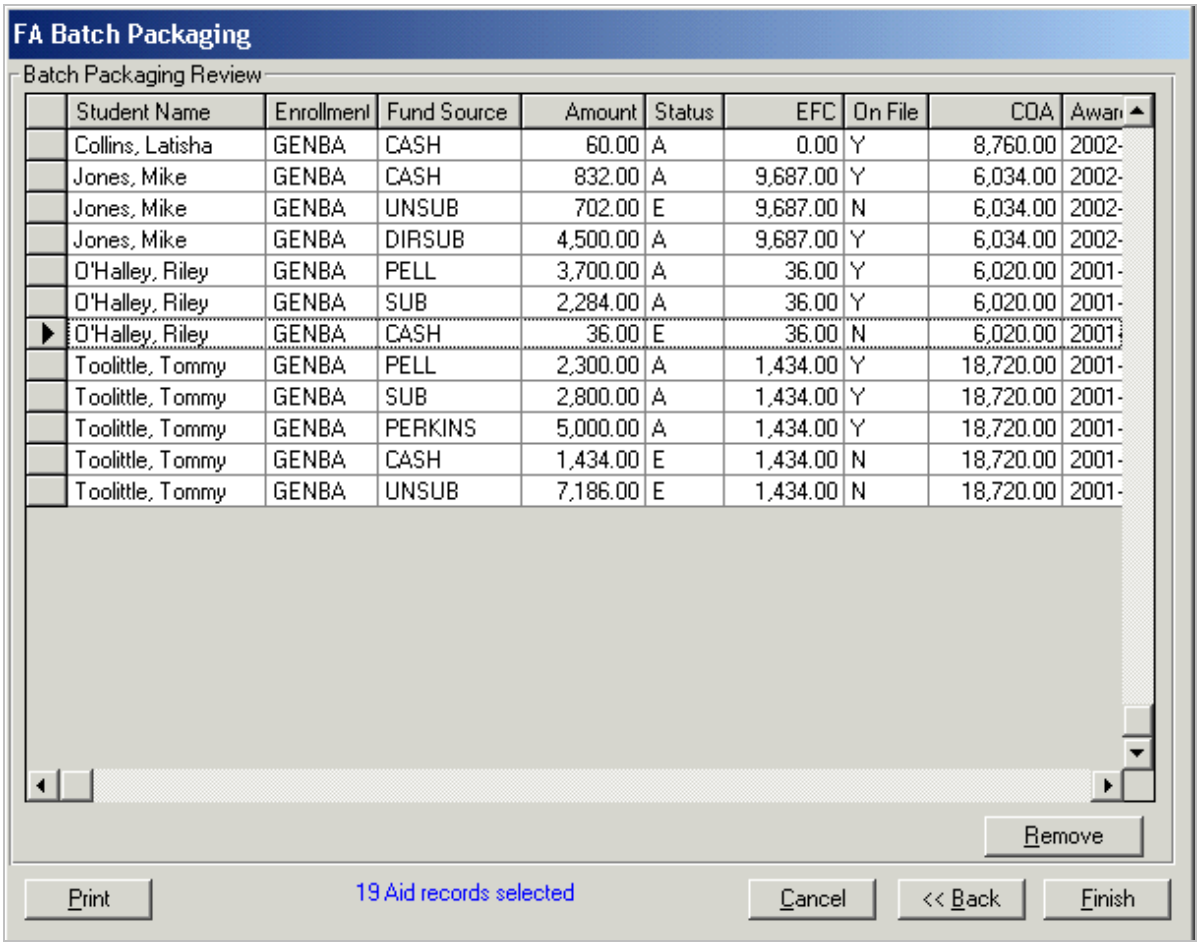
9. Click **Resolve** to resolve the exception for the student. The student is removed from the list after the exception is resolved.

   Note: When you batch package students with overlapping loan periods and the fields "Overlap Period Credits/Hours" and "Overlap Period Weeks" were not populated in the “NSLDS Loans / Overlapping Loan Periods” tab of the NSLDS Previous Institute Details form, exceptions are added. The exception text is "Credits/Hours and Instructional Weeks are required for the overlapping loan period. Please see the student's NSLDS Overlapping Loan information for details."

   When you click **Resolve** on this exception, you are taken to the Awards form. Navigate to the NSLDS form where you can enter the "Overlap Period Credits/Hours" and "Overlap Period Weeks" that are required to create loan periods to award direct loans for the overlapping loan period.

   You can also continue packing excluding the students listed on the exception list.

10. Click **Next**. The Batch Packaging Review list is displayed.



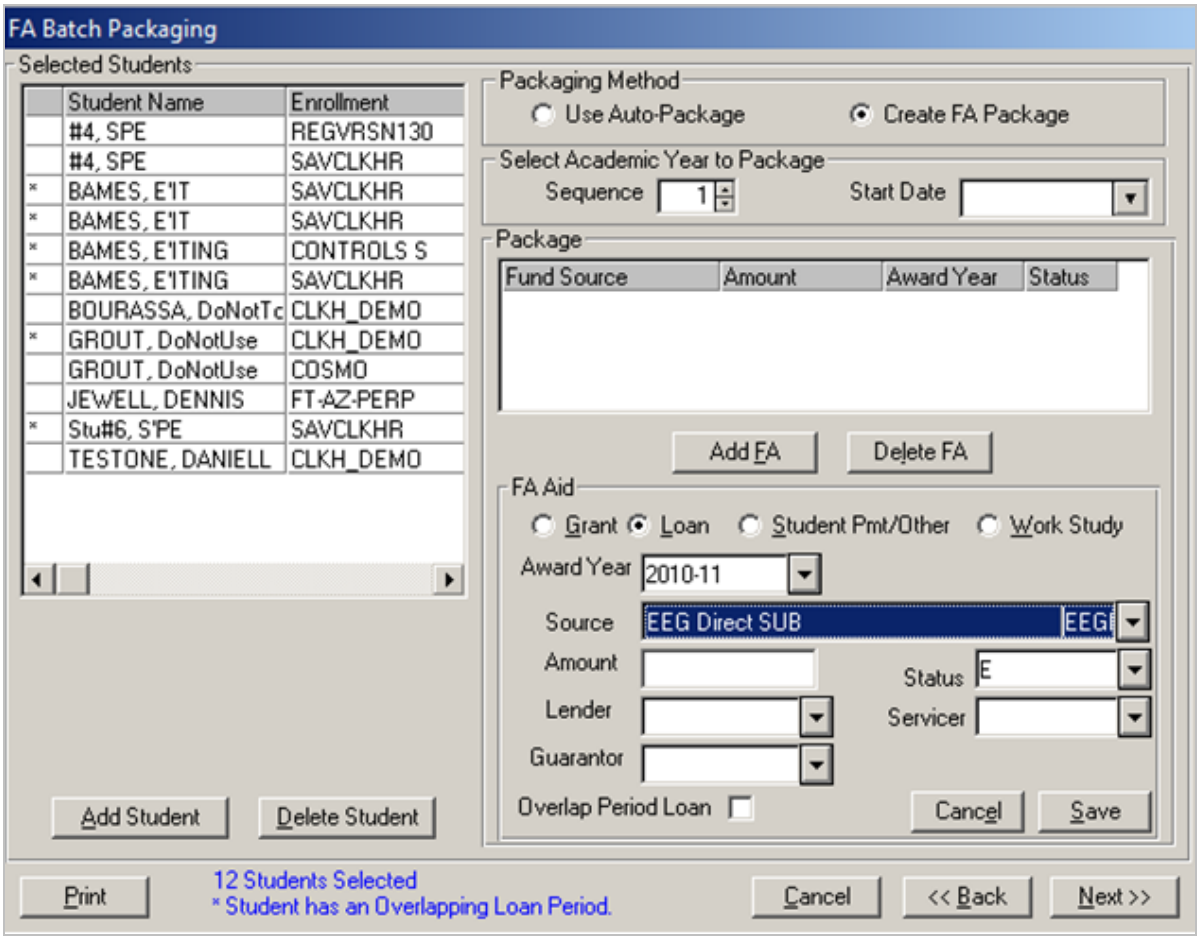
Note: If the **Unsupported Dependent** check box is selected, the student is accepted in the FA Batch Packaging process and awarded only Unsubsidized Stafford loans.

11. Click **Remove** to edit amounts for aid that is not on file and exclude aid. Auto-packaging uses the scheduled disbursements if defined or calculates the disbursements if scheduled disbursements are not defined. All aid is added on estimated status.
12. Click **Finish**. CampusNexus Student completes the aid package and a confirmation message is displayed.

Create FA Package

When you select the *Create FA Package* method, you can select an Award Year, a fund Source, Amount, and Status. For loans, the servicer, lender, and guarantor can be defined. Scheduled disbursements are used if defined.

When *Create FA Package* is selected, and the Academic Year Sequence is set to 1, a new Disb. Schedule menu is displayed. A deactivated fund source for the award year and campus may not appear in the source list.



Students with overlapping loan periods typically have two loan periods in the first Academic Year, a stub loan period and a full loan period that starts within the same Academic Year. Select the Overlap Period Loan check box to indicate whether the direct loan being added is for the stub loan period. A loan that is marked as Overlap Period Loan is assigned to the stub loan period. A loan that is not marked as Overlap Period Loan is assigned to the second loan period in the Academic Year.

Note: Institutions should only package students with stub loan periods together. Packaging students with stub loan period and students without stub loan periods in the same batch can cause undesirable results.

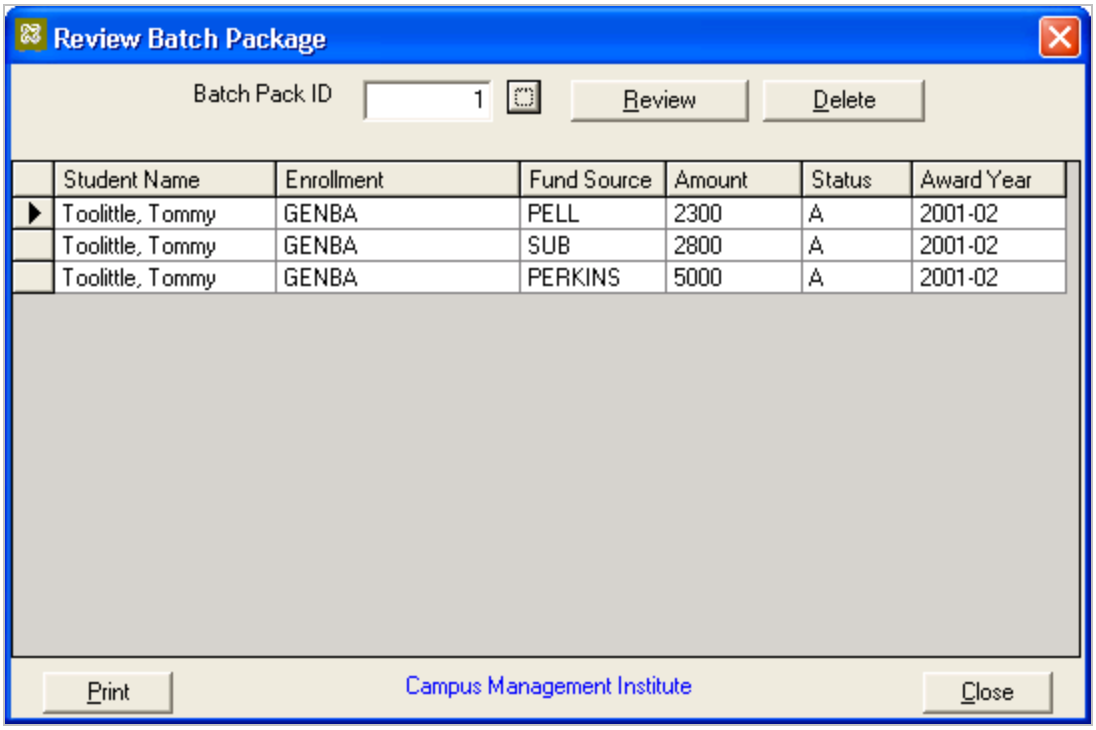
For more information regarding stub loan period and overlapping loan period, refer to Packaging for Overlapping Loans.

Review Batch Package

This feature allows you to review or print batch-packaged financial aid for students.

To review batch-packaged financial aid:

1. Navigate to **Daily** > **Financial Aid**, **Batch Processing > Packaging > Review Batch Package**. The Review Batch Package form is displayed.



2. Enter a Batch Package ID and click **Review** or **List Batches** to display a list of Batch Package IDs with the Number of Records, Date Added, and User for your session default campus.
3. Double-click a row on the list of batches to display the aid packaged in the batch. The grid displays the Student Name, Enrollment, Fund Source, Amount, Status, and Award Year. Also shown on the bottom of the form is your session default campus.
4. Select a batch and click **Delete** to delete all aid associated with the batch. If you elect to delete a batch, a message shows asking you to confirm the deletion. Aid with paid disbursements or Pell with origination statuses A or B will not be deleted.
5. Click **Print** to display a report listing the aid packaged in the selected batch.

Scholarship Processing

This is an outline of the procedure to set up a scholarship for a student. Some preliminary conditions must be in place. As with virtually all student financial aid, a FAFSA must be prepared for the academic year in which the scholarship is to be set up. After the FAFSA is on file, you can continue with the process described below.

To set up a scholarship:

1. Set up the Fund Source.

   Navigate to **Lists > Financial Aid >** Fund Source. Select the Fund Source Type "Scholarship".

2. Set up the Academic Year.

   Navigate to **Lists > Financial Aid >>** Programs.

   - Choose program and program version. Values for academic calendar, credits, and weeks are populated by CampusNexus Student.
   - Click **Add**.
   - Select a **Default Budget**
   - Click **New**.
   - Select **Other Grant**.
   - Select the Number of **Disbursements**.
   - Click **Save**.

3. Select the Student Master of the student to whom you wish to give the scholarship.

   Select **View > Financial Aid >** Packaging.

   - Select the **Enrollment**.
   - Click **Add**.
   - Select the **Academic Year**. (If the Academic Year is not displayed, a FAFSA must be added for the student).
   - Click **Package**.
   - Click **Add**.
   - In the new Source of Aid form, select the **Type of Aid**.
   - Select the Fund **Source**.
   - Enter the **Gross Amount**.
   - Choose a **Status**: A = Approved; E = Estimated; P = Pending.
   - In the Scheduled section, click **Add**.
   - Select or enter the **Exp Date** date in this format: MM/DD/YYYY.
   - Specify the **Exp Amount**. Specify one lump sum distribution or add several smaller amounts that add up to the gross amount.
   - Click **Save** and **Close**.
   - Close all windows.

4. Approve disbursements.

   Navigate to **Daily > Financial Aid > Approve Disbursements to Pay**.

   - Choose **Select a Batch In Progress**.
   - Select the **Award Year**, **Fund Source**, and **Disbursement Dates**.
   - Click **Continue**.
   - Select the **Approve** check boxes next to the amounts.
   - Click **Post Batch**.

5. Post disbursements.

Navigate to **Daily > Student Accounts >** Post FA Disbursements.

- Enter Check #, EFT (if applicable), and term.

6. Verify posting.

   To verify that the amount has been posted, go to the ledger card of the student.

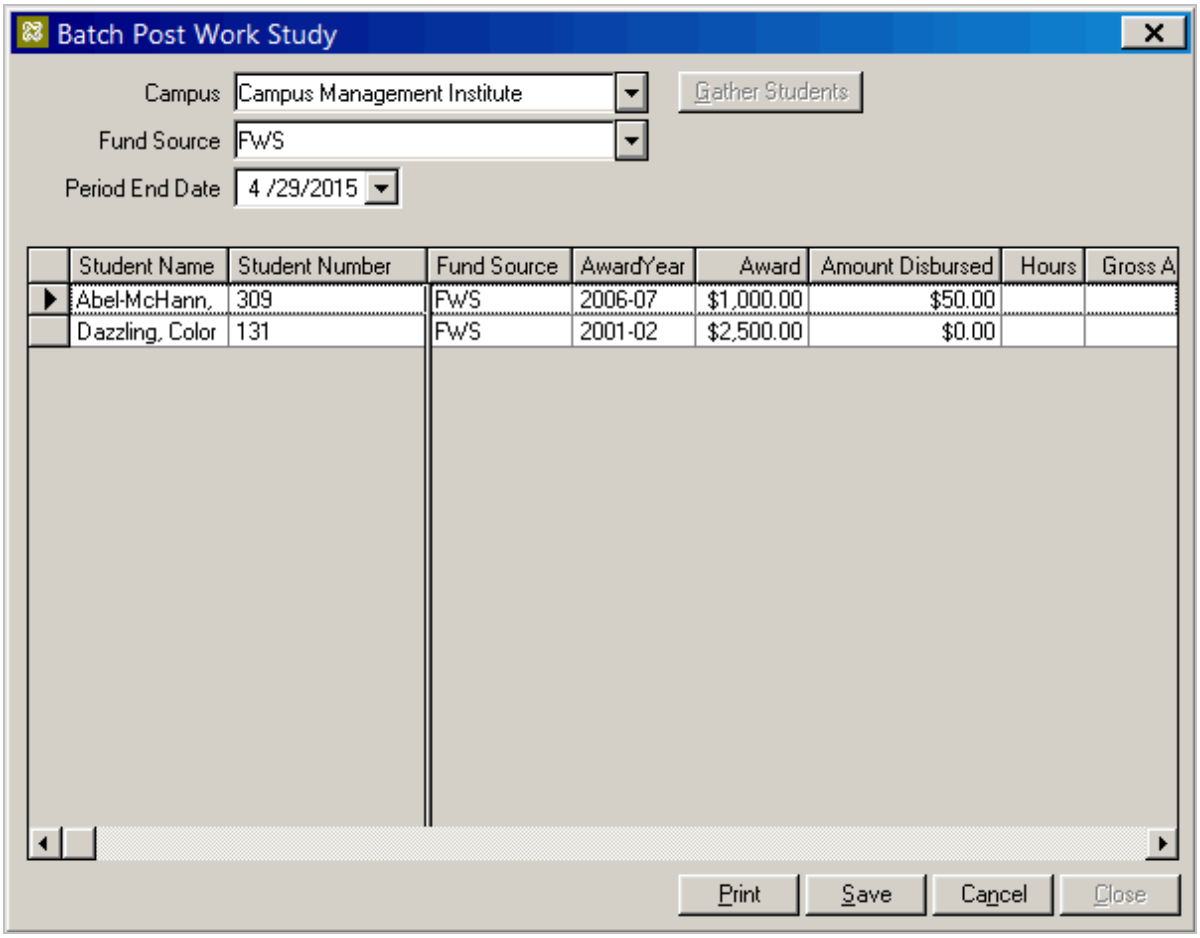
Post Work Study Disbursements

Use the Post Work Study Disbursements form to enter all work study disbursements made for a given pay period.

Note: When CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll, the batch post option for work study disbursements is disabled.

To post work study disbursements:

1. Navigate to **Daily > Financial Aid > Post Work Study Disbursements**. The Batch Post Work Study form is displayed.



2. Select a **Campus**.
3. Select a **Fund Source**. Select only fund sources where the Fund Source Type = WORKST. If you leave the field blank, all fund sources with Type = WORKST are included.
4. Select a **Period End Date**.
5. Click **Gather Students**. CampusNexus Student gathers all work study awards that meet the specified criteria, are for currently enrolled students, and have not been fully disbursed.

   CampusNexus Student displays the following information:

- Student Name
- Student Number
- Fund Source
- Award Year
- Award
- Amount Disbursed
- Hours (Worked) (You enter this.)
- Gross Amount Paid (You enter this.)
- Date Paid (You enter this. The system date is displayed by default.)
- Academic Year (You select this from a list of the academic year records for each student.) Each record includes the academic year number, academic year start date, and academic year end date. The student's current academic year is selected by default.
- Term (You select this from a drop-down list of active terms.) This column can be blank.
- Check Number (You enter this.)

Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

6. For each student who is paid work study, enter the applicable information in the grid.
7. Click **Print**. CampusNexus Student generates a report listing the work study awards that are being disbursed. Only the rows on the grid where the Amount Paid is not equal to zero are listed. The total amount paid is listed at the bottom of the report.
8. Click **Save**. The data you entered is saved to appropriate database tables.
9. Click **Cancel** to undo the results of your search. The system returns the form to its blank state.

Another report is available at Reports > Financial Aid > FA Batch Posting Work Study. This report lists all work study payments made and offers criteria to filter on the date of disbursement.

SSCR Process

Note: Please access Regulatory Help for the latest content about FAFSA, ISIR, and COD processing.

Be sure to select the applicable Student Status Reporting and Default Withdrawal Date Settings options before processing the SSCR file.

Click the Process SSCR Roster File or Process Error Notification link to skip the overview and go right to the procedure steps.

See Status Codes to map school status to NSLDS statuses, and Date/Status tab of the Enrollment folder to verify that the statuses are mapped correctly. For more information, see SSCR Status Mappings.

Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

The **SSCR Processing wizard** uses the enrollment status credits or hours when calculating enrollment status (not the academic credits hours).

Portions of this topic are excerpts from the SSCR User's Guide 1998 published by the U.S. Department of Education. The excerpts contain the **SSCR Process Overview** and **SSCR Cycle** information, and should be read before processing SSCR Roster or Error files.

Process SSCR Roster file

To process the SSCR roster file:

1. Navigate to **Daily** > **Financial Aid** > **SSCR Process** or **SSCR Process (2014-15 and Later**. The SSCR Processing wizard is displayed.

   Note: New NSLDS Enrollment Reporting and Notification processes were introduced in July 2012 to be implemented prior to March 31, 2013. The file format associated with these updates must be used by all customers starting on April 1, 2013. Some customers still wish to use the old format and must work with NSLDS to accept those files. To enable users to have the choice of the old or new formats, the EnableSSCRFormatPost2013 regkey has been set to = 0. Setting this key to 0 changes the look of the SSCR Processing form, enabling customers to choose the Original Format File or the 2013 Enhanced Format File. Customers not wishing to can use the old format can contact Anthology Inc. Support to set regkey EnableSSCRFormatPost2013 = 1, so that the 2013 Enhanced Format File is the default and a choice is not longer available.

2. Select **Process SSCR Roster File** and select the Original Format File or 2013 Enhanced Format File option. If these options are not available, click **Next**.

3. Click **1. Find Roster File**.

4. The Select File to Import form is displayed with the default folder for import and export files selected. Files with the appropriate file name are displayed.

   Note: New NSLDS Enrollment Reporting and Notification processes were introduced in July 2012 to be implemented prior to March 31, 2013. CampusNexus Student updates have been made to replace the previous SSCR processing file layout formats and message classes with the new NSLDS Fixed Width file layout formats and message classes. The changes occur in the processing of SSCR Enrollment Roster Files and Error acknowledgement files.

   The processing of Error Notification files and Enrollment Roster files from NSLDS uses the message class name of EFRFLEOP that allows CampusNexus Student to generate files to be sent to NSLDS using the new message

class name of EFSFLEIN. The processing of the Error Acknowledgement file and the Enrollment Roster files continue to generate the backup file using BK (EFSFLEBK).While CampusNexus Student will continue to support the old file formats and message classes until March 31, 2013, after March 31, 2013, only the new file format and message classes will be supported.

For institutions that have not completed processing of SSCR files that use the old file format and message classes before March 31, 2013, it will be the sole responsibility of the institution to work directly with NSLDS to convert their files. For more information, pleae refer to the NSLDS Enrollment Reporting Guide, 2012.

5. Select the roster file to be processed and click **Open**. The selected File Name is displayed and the 2. Match Roster File button is *enabled*.

6. Click **2. Match Roster File** to start the matching process. CampusNexus Student examines the SSCR records from the NSLDS, comparing each one to the *existing* student master records in the CampusNexus Student database. When the processing is completed, a confirmation message is displayed.
7. Click **OK** to acknowledge the message and complete the process.

   Note: Be sure to write down the directory folder and file name for the correction file. Clicking OK will close the SSCR Processing wizard. (The Finish button is not used in this procedure.)
8. CampusNexus Student displays the **SSCR Import File Process Report**. The report shows any anomalies detected in the processing of the file. If you opted to *include new students* on the SSCR Roster File by selecting the Include New Students option, then they will be added to the SSCR Import File Process Report (denoted by *** ADDED TO FILE ***), as well as the Roster return file that is sent to NSLDS.
9. Use EDConnect to export the Roster return file to the NSLDS.

   When viewing the *report* generated by the CampusNexus Student:

   If school statuses have been mapped to NSLDS statuses, the appropriate 'Code for Enrollment Status' is recorded for each student in the 'New Status' column, and the 'Date of Anticipated Completion', and/or 'Date Enrollment Status Effective' is recorded for the student (if required for the particular Code for Enrollment Status) that is based on the mapped NSLDS status and not the Campus Status.

   When viewing the *text file* generated for the process:

   If school statuses have been mapped to NSLDS statuses, the appropriate 'Code for Enrollment Status' is recorded for each student in field position 290, and the 'Verify that the Date of Anticipated Completion (field position 139-

146)', and/or 'Date Enrollment Status Effective (field position 291-298)' is recorded for the student, if required for the particular 'Code for Enrollment Status' that is based on the mapped NSLDS status and not the Campus Status.

Process Error Notification

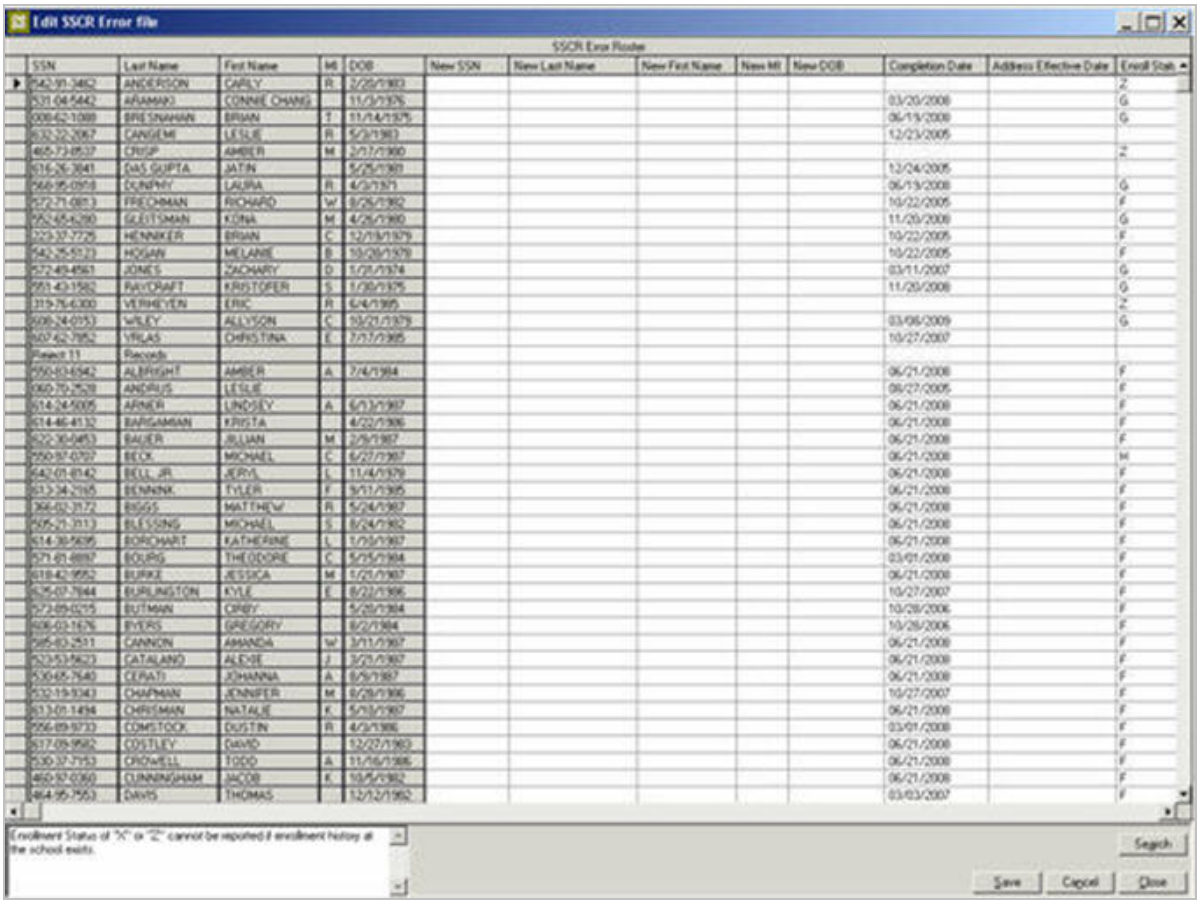
To process the SSCR Error Notifications:

1. Navigate to **Daily** > **Financial Aid** > **SSCR Process**. The SSCR Processing wizard is displayed.
2. Select one of the file formats, select **Process SSCR Error Notification**, and click **Next**. The Edit Error File form is displayed.
3. Click the **1. Find Error File** button and locate the error file in the default directory.

   Note: As stated above, new NSLDS Enrollment Reporting and Notification processes were introduced in June 2012 to be implemented prior to March 31, 2013. CampusNexus Student updates have been made to replace the previous SSCR processing file layout formats and message classes with the new Enrollment Reporting file layout formats and message classes. The changes occur in the processing of SSCR Enrollment Roster Files when exporting the files to the Clearinghouse, and the processing of SSCR Error Notification Files when regenerating the Extract File.

   The processing of Error Notification files from NSLDS using the new message class name of EFRFLEOP allows the Error Correction files to generate from NSLDS using the new message class name of EFSFLEIN. The processing of the Error Acknowledgement file continues to generate the backup file using BK (EFSFLEBK). It processes and generates the SSCR Error Correction files using the new file layout format as defined by NSLDS, including the new required data elements of Credential Level, Student Address, Term start and end dates, Anticipated Graduation Date (which uses new logic for less than half time status students and current logic for full or half time status students), and Full Middle Name. The Clearinghouse export file regenerates populating the newly required fields as designated by NSLDS and uses the new file format (A2) for the Clearinghouse as designated in the NSLDS Enrollment Reporting Guide 2012.

   For institutions that have not completed processing of SSCR files that use the old file format and message classes before March 31, 2013, they will have to select the old file format and will have to work directly with NSLDS to convert their files. For more information, refer to the NSLDS Enrollment Reporting Guide, 2012.
4. Select the file to be processed and click the **Open** button.
5. The 2. Match Error File button becomes enabled and the filename and file location are displayed. Click the **2. Match Error File**. The Edit SSCR Error File screen appears containing the records that were rejected by NSLDS.



6. The Edit SSCR Error file screen will:

    a. Group students with reject codes other than Reject 11 in the Error file alphabetically at the top of the list, and

    b. Group all students having only a Reject 11 record in the Error file at the bottom of the list. A separator line appears following the first group of students and just above the second group of students to differentiate the Reject 11 records.

7. Students who have only Reject #11 error records are *excluded* when building the outgoing error response file, so that they are never resubmitted in the response to the SSCR Error/Acknowledgement file. The trailer record layout of the SSCR export file is the same as the SSCR record layout.

8. This screen displays the values for the student's SSN, Last Name, First Name, Middle Name, Date of Birth, Completion Date, Enrollment Status Code, and Date Enrollment Status fields. The SSN through the Date of Birth fields *cannot* be edited, however, all other fields can be edited or new values assigned in the New SSN, New Last Name, New First Name, New Middle Name, New Date of Birth, or Address Effective Date.

9. You can also search for students using the Search button at the bottom right-hand corner of the screen.

10. Any **Reject 11** Records are listed following the **Reject 11 Records** header row.

    These records are returned from NSLDS when they do not have any information for new students. If you opted to include new students on the SSCR Roster File by selecting the Include New Students option, then when NSLDS does not have information on the new students, it will return the records as Reject 11 records. You do not need to

do anything to the reject 11 students within the error file itself. These are simply displayed as information to the institution that NSLDS does not have these students on file.

11. Make your corrections and click **Save** or click **Cancel** to discard any changes.
12. Click **Close** to exit the screen. If you click Close without saving or exporting the file, the following message is displayed: *Ok to close this form without saving and building Error Correction File?*

    Click **No** to return to the Edit SSCR Error File screen or **Yes** to exit without saving or building an Error Correction File.
13. If you select **Save**, CampusNexus Student creates an SSCRXXIN file that you can export.

    ⚠ Be sure to write down the directory folder and file name for the correction file.

    Click **OK** to continue.
14. Use EDConnect to send any correction file back to NSLDS.

Begin Excerpts

SSCR Process Overview

Since the passage of the Higher Education Act of 1965, schools have been required to confirm and report the enrollment status of attending students who receive federal loans. This reporting process is called Student Status Confirmation Report (SSCR). Because a student's enrollment status determines his or her deferment privileges and grace periods, as well as the government's payment of interest subsidies, SSCR is critical for effective administration of Title IV loans. It is the primary means of verifying students' loan privileges and the federal government's monetary obligations.

In 1994, the U.S. Department of Education (ED) began using the National Student Loan Data System (NSLDS) to track and monitor all student loan borrowers and grant overpayments. ED has incorporated SSCR into the NSLDS to centralize and fully automate the enrollment verification system.

Note: The logic that calculates enrollment statuses within the SSCR and Clearinghouse by Term processes also supports Term Groups.

The SSCR Cycle

SSCR processing through NSLDS significantly streamlines the entire enrollment confirmation procedure. At the same time, it can optimize the frequency of scheduled reporting cycles and, therefore, the timeliness of the data. The list below describes the entire activity, step by step, showing which participant is responsible for each step. Regardless of how many times you elect to report, each cycle must include the following steps:

1. **NSLDS**:
   A. Generates the SSCR Roster File for your school.
   B. Forwards the Roster File to you.
2. **Your School**:
   A. Receives the SSCR Roster file.
   B. Matches the Roster File against registration files.
   C. Updates each student's enrollment status and effective enrollment status date with valid codes on the

SSCR Roster File, as defined in chapter 5 of ED's User Guide.

D. Proposes changes to student identifiers (student's SSN, last name, first name, middle initial, and birth date) as needed.

E. Changes or adds student permanent address data as needed.

F. Adds a detail record to the file for each new student as needed.

G. Checks that the updated file contains valid data, as defined in Chapter Five of ED's SSCR User Guide, to reduce the likelihood that NSLDS will find errors.

H. Returns the updated SSCR Roster File, now called the SSCR Submittal File, to NSLDS within 30 days of the date it was sent to the school.

3. **NSLDS**:

   A. Receives the SSCR Submittal File.

   B. Edits (error-checks) the Submittal File contents.

   C. Updates the NSLDS database with enrollment status changes.

   D. Captures proposed student identifier changes and new or changed address data.

   E. Returns the SSCR Error Notification File, which includes any records containing errors, applicable error codes, and a count of accepted and rejected records, to your school for correction. If there are no errors, the file contains a count of accepted records and no detail records.

   F. Forwards the new and changed data to each affected data provider (such as GAs and Direct Loan Servicer).

   G. Monitors the timeliness of your school's response, following up if necessary.

4. **Your school**:

   A. Receives and saves the SSCR Error Notification File.

   B. If all records were accepted by NSLDS, considers the SSCR cycle complete. Corrects any records with identified errors.

   C. Returns the corrected records to NSLDS as the SSCR Error Correction File within ten days of the date it is sent to the school.

5. **If your school returned an SSCR Error Correction File, NSLDS**:

   A. Receives the returned SSCR Error Correction File.

   B. Edits the returned Detail Records.

   C. Repeats steps 3C through 3G for the returned Detail Records.

   D. Sends a revised SSCR Error Notification File to your school.

NSLDS begins the next cycle by generating a new **Roster File** reflecting all changes accepted from the last **SSCR Roster**, including unresolved errors from the previous cycle.

End Excerpts

SSCR Status Mappings

This topic describes the Enrollment Reporting (formerly known as SSCR) statuses. The table consists of SyStatusID status codes, their descriptions, and the status categories associated with each code, and how these codes are interpreted by NSLDS.

SSCR Status Mappings

SyStatusID	Code	Description	Status Category	NSLDS interprets this as:
1	NEW	New Lead	(L) Lead	n/a - no enrollment
2	SCHED	Interview Scheduled	(L) Lead	n/a - no enrollment
3	INT	Interviewed	(L) Lead	n/a - no enrollment
4	APPREC	Application Received	(C) Applicant Processing	n/a - no enrollment
5	FUT	Future Start	(E) Enrollment	(X) Never Attended
6	BP	Being Processed	(E) Enrollment	(X) Never Attended
7	REENTRY	Re-Entry	(E) Enrollment	Calculates Previous School Status
8	FROMPROG	Transfer From Other Program	(E) Enrollment	(X) Never Attended
9	FROMCAMP	Transfer From Other Campus	(E) Enrollment	(X) Never Attended
10	NOSHOW	No Show	(N) Never Attended	(X) Never Attended
11	CANCEL	Cancel	(N) Never Attended	(X) Never Attended
12	APPREJ	Application Not Accepted	(N) Never Attended	(X) Never Attended
13	ATT	Attending	(A) Active	Calculates Enroll Status
14	PROB	Probation	(A) Active	Calculates Enroll Status
15	LOA	Leave of Absence	(T) Temporary Out	(A) Approved Leave of Absence
16	SPN	Standard Period of Non-Enrollment	(T) Temporary Out	Calculates Enroll Status
17	GRAD	Graduate	(P) Permanent Out	(G) Graduated
18	COMPLETE	Complete	(P) Permanent Out	(G) Graduated
19	INC	Incomplete	(P) Permanent Out	Calculates Enroll Status
20	DROP	Drop	(P) Permanent Out	(W) Withdrawn

SyStatusID	Code	Description	Status Category	NSLDS interprets this as:
21	TOPROG	Transfer To Other Program	(P) Permanent Out	n/a - will find a more recent enrollment
22	TOCAMP	Transfer To Other Campus	(P) Permanent Out	n/a - will find a more recent enrollment
23	NP	Not Yet Placed	(G) Graduate-Placement	n/a - career services status
24	PLACED	Currently Placed	(G) Graduate-Placement	n/a - career services status
28	NA	Not Available	(G) Graduate-Placement	n/a - career services status
29	NDS-ATT	NDS: Attending	(Y) NDS-Active	Calculates Enroll Status
30	NDS-PROB	NDS: Probation	(Y) NDS-Active	Calculates Enroll Status
31	NDS-FUT	NDS: Future Start	(X) NDS-Enrollment	(X) Never Attended
32	NDS-BP	NDS: Being Processed	(X) NDS-Enrollment	(X) Never Attended
33	NDS-RE	NDS: Re-Entry	(X) NDS-Enrollment	Calculates Previous School Status
34	NDS-COMP	NDS: Complete	(Z) NDS-Permanent Out	(G) Graduated
35	NDS-INC	NDS: Incomplete	(Z) NDS-Permanent Out	Calculates Enroll Status
36	NDS-DROP	NDS: Drop	(Z) NDS-Permanent Out	(W) Withdrawn
37	NDS-NO	NDS: No Show	(W) NDS-Never Attended	(X) Never Attended
38	NDS-CAN	NDS: Cancel	(W) NDS-Never Attended	(X) Never Attended
39	NDS-REJ	NDS: Application Rejected	(W) NDS-Never Attended	(X) Never Attended
40	PENDAPP	Pending Applicant	(C) Applicant Processing	n/a - no enrollment
41	ISPLACED	InSchool Placed	(I) In School-Placement	n/a - career services status

SyStatusID	Code	Description	Status Category	NSLDS interprets this as:
42	ISNP	InSchool Not Yet Placed	(I) In School-Placement	n/a - career services status
43	ISNA	InSchool Not Available	(I) In School-Placement	n/a - career services status

Print ISIRs-Batch

Note: Please access Regulatory Help for the latest content about FAFSA, ISIR, and COD processing.

Review/Print Multiple Batches

This function serves three purposes.

1. Review financial aid data import batch files.
2. Review financial aid data export batch files.
3. Import groups of files into CampusNexus Student at the same time rather than individually.

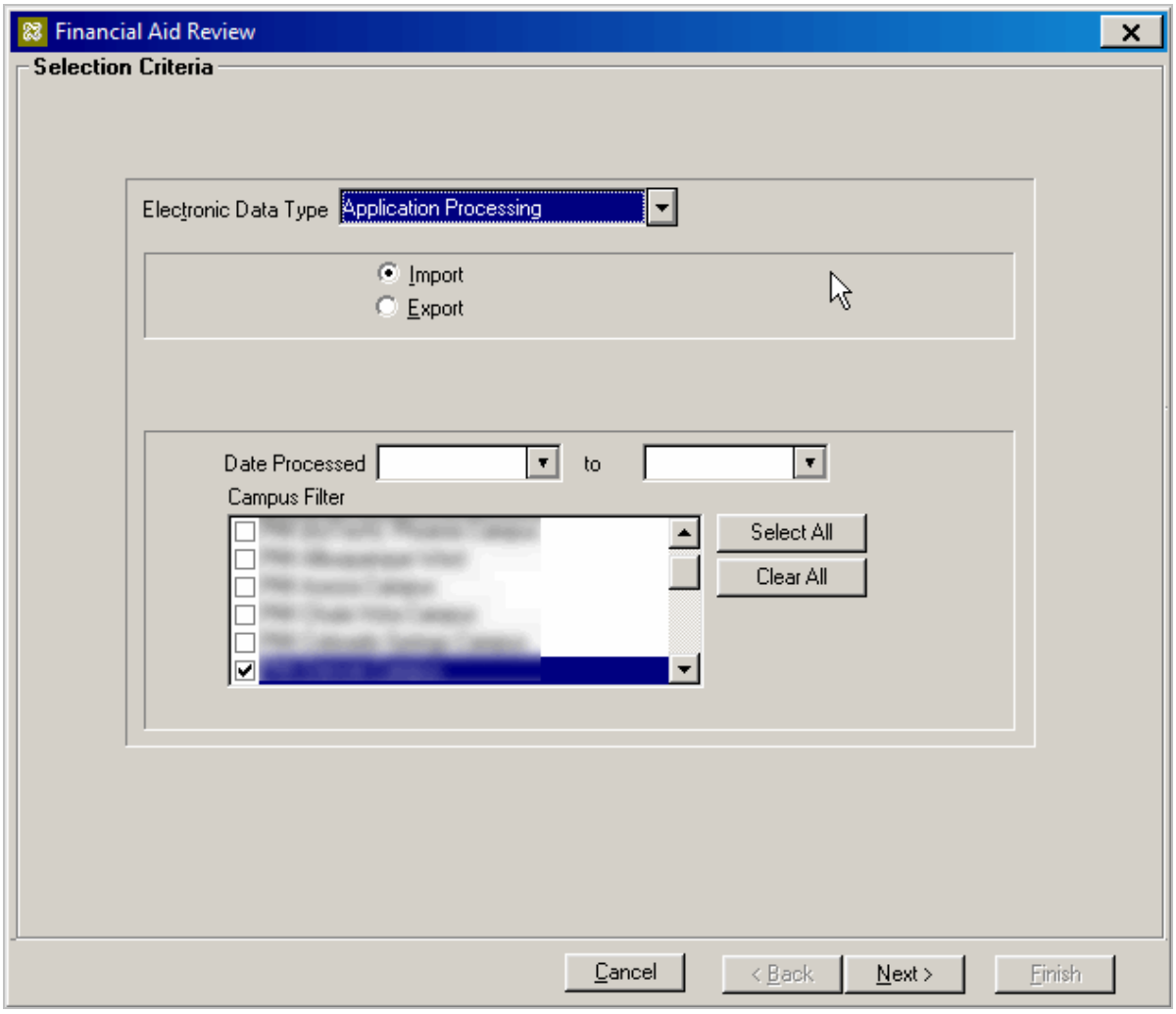
Review Import Batches

Import batches from the following sources can be reviewed:

- Central Processing System (CPS) - Application Processing
- Clearinghouse/National Student Loan Data System (NSLDS) - SSCR Roster Files
- Common Origination and Disbursement (COD) - Direct Loan Files, Program Files
- Recipient Financial Management System (RFMS) - Pell Grant Files

To review an imported batch file:

1. Navigate to **Daily > Financial Aid** > **Review/Print Multiple Batches**. The Financial Aid Review wizard is displayed.



2. Select the Electronic Data Type that you want to review. The options are:
    - Application Processing
    - Clearinghouse
    - Direct Loan
    - Pell / RFMS
    - COD
    - ACG Grants
    - SMART Grants
    - SSCR
3. Select a **Date Processed** range.
4. Select **Import** to import a file or **Export** to export a file. SSCR files can only be imported, so these options will not appear when SSCR is selected as the Electronic Data Type.
5. If the **Campus Filter** grid is presented, use the check boxes to select/ clear campuses. For speed and ease of use, use the **Select All** and **Clear All** buttons and add and delete campuses individually, if applicable.
6. Click **Next>**. The next page of the wizard, the Electronic Data for Application Processing Export Records form, presents a list of imported batches for the selected file types. In the **Batch Information** grid, you will see the Batch ID, School Id, File Type, Number of Records, Award Year, Date Added, File Name, Regeneration Flag, and Regenerated Batch ID.
7. Select the batch file that you want to review.
8. Click **Print to print a report of the batch you selected.** You cannot review a batch that has been regenerated. You can, however examine the file resulting from the regeneration. If the system is unable to print a report, a message will so indicate and provide the batch number by which it has been regenerated.
9. The Report Preview window is displayed for the batch selection made above. Browse or print it as you would any other report.
10. After closing the report viewer, click **Finish** to close the **Import and Review form** or select and review another batch.

Review Export Batches

The process for reviewing export batches is the same as for import batches.

Batch Import

(Import Multiple Batches.) At this time, the Batch Import function only works with Pell/RFMS files. Other file sets will be added in the future. Basically, you can select files from the list and import them in the appropriate order to be processed by CampusNexus Student. There are some caveats. For instance, if you select disbursement acknowledgments but do not select the corresponding origination acknowledgments, the disbursement records will not be posted.

Otherwise, the selected batch files will be processed just as if they were selected individually under the other Import Data menu options.

To import a group of files:

1. Navigate to **Daily > Financial Aid** > **Review/Print Multiple Batches**. The Electronic Data for Importing Batches wizard is displayed.
2. Select the **Electronic Data Type**, for example, Pell / RFMS.
3. Select **Import**. The Attending Pell ID list box appears.
4. Select the appropriate **Attending Pell ID**.

5. Click **Next**. A list of available batch files is displayed in a grid. The files are listed in the appropriate order for processing.
6. Click each of the files you want to import to select them.
7. Click **Batch Import**. CampusNexus Student processes each of the files from the top of the list to the bottom.
8. When the processing is completed, CampusNexus Student returns to the grid form and enables the **Print** button.
9. Click **Print** to print the appropriate report of the files you imported.

Export and Import File Types

The tables below list the files that CampusNexus Student exports to financial aid-related destinations and imports from these destinations.

- FAFSAs and ISIRs
- Direct Loans
- Pell Grants
- SSCR/Clearinghouse
- Third Party Servicers
- Import Attendance/Grades
- COD Export and Import

In the file names, the letters "*yy*" represent the financial aid award year in many file names. For instance, the award year 2015-2016 is represented as "*16*".

Note: You can generate a report that lists information about files that have been imported or exported for Application Processing, Clearinghouse, COD, Direct Loan, Pell/RFMS, SSCR and SSCE. For more information, see FA Export/Import Batch Tracking.

FAFSAs and ISIRs

CampusNexus Student exports files to and imports files from the Central Processing System (CPS).

- Export file names end in "IN".
- Import file names end in "OP".

The file names change periodically. For an up-to-date, downloadable table of FAFSA and ISIR file names, refer to "Message Classes" in the EDE Technical Reference at https://ifap.ed.gov/ilibrary/document-types/ede-technical-reference.

FAFSA and ISIR Files

File Name	From	To	Description
COREyyOP	CPS	School	Electronic correction errors file
CORRyyIN	School	CPS	Corrections to FAFSA/ISIRs; Duplicate Requests
EAPRyyOP	CPS	School	Electronic Application (FAFSA) rejects
EAPSyyIN	School	CPS	Initial Applications/Renewal Applications
EAPSyyOP	CPS	School	Electronic Application ISIRs from processed initial applications. May have reject codes included.
ESFNyyOP	CPS	School	Site Agency ISIR Non-Resident file
ESFRyyOP	CPS	School	State Agency ISIR Resident file
FDREyyOP	CPS	School	Error Report File
FDRFyyOP	CPS	School	Processed FDRs
IDAPyyOP	CPS	School	Daily ISIRs that are the result of Applications records submitted by the school
IDCOyyOP	CPS	School	Daily ISIRs that are the result of Correction Records submitted by the schools
IDSAyyOP	CPS	School	Daily ISIRs that are generated for all schools listed on the record

File Name	From	To	Description
IGCOyyOP	CPS	School	CPS pushed ISIR that are the result of Correction Records submitted by the school
IGSAyyOP	CPS	School	CPS pushed ISIR that are generated for all schools listed on the records
ISRFyyOP	CPS	School	ISRF requested directly from the ISIR Datamate
RAPRyyOP	CPS	School	Error File
REAPyyOP	CPS	School	Not supported after 2003
SARAyyOP	CPS	School	Automatic Institutional Student Information Records (ISIRs)
SAREyyOP	CPS	School	Electronic correction and duplicate request errors. Reject error report
SARRyyOP	CPS	School	ISIRs generated from corrections/duplicate records
SIGAyyOP	CPS	School	Signature correction errors file
SIGSyyIN	School	CPS	Signature corrections file
SYSGyyOP	CPS	School	System generated ISIRs resulting from CPS reprocessing, NSLDS Post-screening, or students being removed from a hold file
YTDOyyOP	CPS	School	Year-to-Date ISIR file
YTDRyyOP	CPS	School	State Agency YTD ISIR residential file

Direct Loans

CampusNexus Student exports files to and imports files from the the Common Origination and Disbursement (COD) system.

- Export file names end in "IN".
- Import file names end in "OP".

Direct Loan Files

File Name	From	To	Description
CRCSyyOP	COD	School	Credit Status Response
CRECMYOP	COD	COD	Direct Loan Entrance Counseling Acknowledgment
CRIByyOP	COD	School	Direct Loan - Informed Borrowing Response (Award Year 2020 and later)
CROFyyOP	COD	School	Origination Fee and Interest Rebate Percentage Response
CRSPyyOP	COD	COD	Direct Loan Plus Application Acknowledgment
CODRBFOP	LOC	School	Year-to-Date Rebuild
DECFyyOP	LOC	School	Entrance Counseling Results
DEPFyyIN	School	LOC	Loan Origination - PLUS
DERCyyIN	School	LOC	Loan Detail

File Name	From	To	Description
DESCyyIN	School	LOC	Loan Origination Changes
DESDyyIN	School	LOC	Disbursements
DESFyyIN	School	LOC	Loan Origination - Stafford
DIAAyyOP	LOC	School	Anticipated Disbursement Listing
DIAOyyOP	LOC	School	Actual Disbursement Roster
DIOCyyOP	LOC	School	Loan Origination Change Acknowledgment
DIODyyOP	LOC	School	Disbursement Acknowledgment
DIPAyyOP	LOC	School	Promissory Note Acknowledgment
DIPCyyOP	LOC	School	PLUS Credit Decision Acknowledgment
DIPFyyOP	LOC	School	Loan Origination Acknowledgment - PLUS
DISFyyOP	LOC	School	Loan Origination Acknowledgment - Stafford
DIWRyyOP	LOC	School	30 Day Warning Report
DLADyyOP	LOC	School	Actual Disbursement List (Comma-Delimited)
DLRBLDOP	LOC	School	Year-to-Date Rebuild File, Originations and Disbursements
DSASyyOP	LOC	School	School Account Statement (old)
DSDFyyOP	COD	School	School Account Statement Loan Detail - Disbursement Level (fixed format)
DSLFyyOP	COD	School	School Account Statement Loan Detail - Loan Level (fixed format)
ED01yyOP	LOC	School	Loan Detail Exception Report - Booked Loans
ED02yyOP	LOC	School	Loan Detail Exception Report - Unbooked Loans
ED03yyOP	LOC	School	Duplicate Student Borrower Report
ED04yyOP	LOC	School	Delinquent Borrower Report
ED06yyOP	LOC	School	Inactive Loans Report
ED07yyOP	LOC	School	Name, DOB, SSN Changes Report
ED08yyOP	LOC	School	Import pending SSN changes over 45 days report
MPININAOP	LOC	School	Expired MPN Report
MPNDISOP	LOC	School	MPN Discharge Report
MPNEXPOP	LOC	School	MPNs Due to Expire Report
TIOCyyOP	LOC	School	Test File; Same as DIOCyyOP

File Name	From	To	Description
TIODyyOP	LOC	School	Test File; Same as DIODyyOP
TIPAyyOP	LOC	School	Test File; Same as DIPAyyOP
TIPCyyOP	LOC	School	Test File; Same as DIPCyyOP
TISFyyOP	LOC	School	Test File; Same as DISFyyOP
TSASyyOP	LOC	School	School Account Statement

Pell Grants

CampusNexus Student exports files to and imports grant files from the Common Origination and Disbursement (COD) system.

- Export file names end in "IN".
- Import file names end in "OP".

Pell Grant Files

File Name	From	To	Description
PGASyyOP	COD	School	Statement of Account Records
PGDAyyOP	COD	School	Disbursement Acknowledgment
PGDRyyIN	School	COD	Disbursement Records
PGIAyyOP	COD	School	Institution Data Acknowledgment
PGIDyyIN	School	COD	Institution Data Record (Discontinued as of award year 2002-03)
PGMRyyOP	COD	School	Multiple Reporting Records
PGOAyyOP	COD	School	Origination Acknowledgment
PGORyyIN	School	COD	Origination Records
PGPRyyOP	COD	School	Pell POP Report
PGRAyyOP	COD	School	Data Request Acknowledgment
PGRCyyOP	COD	School	Reconciliation Records
PGRQyyIN	School	COD	Data Request Records
PGSDyyOP	COD	School	Special Disbursement Acknowledgment
PGSNyyOP	COD	School	SSN/Name/DOB Records
PGSPyyIN	School	COD	Special Disbursement Records
PGYRyyOP	COD	School	Year-to-Date Records
TGDAyyOP	COD	School	Test File; Same as PGDAyyOP
TGOAyyOP	COD	School	Test File; Same as PGOAyyOP

File Name	From	To	Description
TGSDyyOP	COD	School	Test File; Same as PGSDyyOP
TGYRyyOP	COD	School	Test File; Same as PGYRyyOP

SSCR/Clearinghouse

CampusNexus Student imports Student Status Confirmation Report (SSCR) data from and exports student data to the Clearinghouse or directly to the National Student Loan Data System (NSLDS). In the table below, **yy** is used instead of a 2-digit year code. This is so the process can apply to multiple award years instead of individual award years.

SSCR/Clearinghouse Files

File Name	From	To	Description
SSCEyyOP	CPS	School	SSCR Error File
SSCMyyOP	NSLDS	School	Error/Notification File
SSCRyyIN	School	NSLDS	File generated as a result of ad hoc reporting
SSCRyyIN	School	NSLDS	Completed SSCR rosters
SSCRyyOP	NSLDS	School	Initial SSCR Roster File

Third Party Servicers

CampusNexus Student exports files to and imports files from the Global Financial Services.

The file naming convention is **nnYYMMDDxx.###**, where:

- **nn** is the file type (for example MA, DA, BR, etc.),
- **xx** is the file sequence number (01, 02, ..., thereby allowing multiple files of the same type to be sent on a given day), and
- **###** is the school code extension that matches the configuration on the campus level within CampusNexus Student.

Third Party Servicer Files

File Name	From	To	Description
AP	GLOBAL	School	GLOBAL R2T4 Refund File
AR	GLOBAL	School	GLOBAL Tuition Adjustment File
BR	GLOBAL	School	GLOBAL Budget File
CA	GLOBAL	School	GLOBAL Change File
CLFAFAID	GLOBAL	School	GLOBAL Identifier File. Used to match Global records with CampusNexus Student records
DA	GLOBAL	School	GLOBAL Scheduled FA Disbursements – Each MA file is accompanied by a DA file. You will not receive a DA file without a corresponding MA file.
EAPS	GLOBAL	School	GLOBAL forwards ISIRs to the school

File Name	From	To	Description
MA	GLOBAL	School	GLOBAL Scheduled FA Awards
PA	GLOBAL	School	GLOBAL Actual FA Disbursements
RE	GLOBAL	School	GLOBAL Refund File
SD	GLOBAL	School	GLOBAL Document File
SFnnnn	School	GLOBAL	Add-Drop Extract (nnnn is the school code)
SFnnnn	School	GLOBAL	Pre-Pull Extract (nnnn is the school code)
SFnnnn	School	GLOBAL	Weekly Extract (nnnn is the school code)

Import Attendance/Grades

All file types are supported.

COD Export and Import

COD Export and Import Files

File Name	From	To	Description
ATSDISPOP	COD	School	ATS Discharge length record layout.
COMRECIN	School	COD	Non-program specific and non-award years specific data.
COMRECOP	COD	School	Receipts from COD system to school for the incoming message classes COMRECIN, CRPGMYIN, CRDLMYIN, or CREDMYIN.
CRAAyyIN	School	COD	Common record documents containing data from any or multiple programs sent from school to COD system.
CRAAyyOP	COD	School	Responses sent from COD system to school for data received in the CRAA06IN message class.
CRAC1OOP	COD	School	TEACH Grant Counseling Acknowledgment.
CRATyyOP	COD	School	TEACH ATS Note Acknowledgment, Award Year Specific.
CRBNyyOP	COD	School	Booking notification.
CRCOyyOP	COD	School	Credit decision override.
CRDLMYIN	School	COD	Common record documents containing Direct Loan data from any or multiple award years send from school to COD system.
CRDLyyOP	COD	School	Responses sent from COD system to school for Direct Loan data received in the CRPAMYN message class.
CRNDyyOP	COD	School	Negative disbursement.

File Name	From	To	Description
CRPGMYIN	School	COD	Common record documents containing Pell Grant data from any or multiple award years sent from school to COD system.
CRPGyyOP	COD	School	Responses sent from COD system to school for Pell Grant data received in the CRPAMYIN message class.
CRPNyyOP	COD	School	Acknowledgment.
CRPSyyOP	COD	School	Payment to services.
CRRCyyOP	COD	School	Receipts sent from COD system to school for the incoming messages classes CRARyyIN, CRPGyyIN, and CRDLyyIN.
CRSGMYIN	School	COD	Common Record Documents containing National SMART data for any or multiple award years.
CRSGMYOP	COD	School	Responses sent from COD System to school for National SMART data received in the CRAGMYIN message class.
CRSGyyIN	School	COD	Common Record Documents containing National SMART data for the award year sent from school to COD System.
CRSGyyOP	COD	School	Responses sent from COD System to school for National SMART data for the award year received in the CRSG07IN message class.
CRTH09IN	School	COD	Common Record, TEACH, Award Year Specific.
CRTH09OP	COD	School	Common Record, TEACH, Award Year Specific.
CRTHMYIN	School	COD	Common Record, TEACH, Multi-Award Year.
CRTHMYOP	COD	School	Common Record, TEACH, Multi-Award Year
CRWByyOP	COD	School	Responses for activities performed on the COD website.
SGASyyOP	COD	School	SMART - Electronic Statement of Account.
SGMRyyOP	COD	School	SMART - Multiple Reporting Records.
SGPDyyOP	COD	School	SMART - Pending Disbursement List.
SGRAyyOP	COD	School	SMART - Data Request Acknowledgment.
SGRCyyOP	COD	School	SMART - Reconciliation File Acknowledgment.
SGYRyyOP	COD	School	SMART - Year to Date Records.
THIGPFOP	COD	School	TEACH Inactive Grants Report.
THMRyyOP	COD	School	TEACH Grant Multiple Reporting Record (MRR)
THPDyyOP	COD	School	TEACH Pending Disbursement List.
THRB1OOP	COD	School	TEACH REBUILD.

File Name	From	To	Description
THSMyyOP	COD	School	TEACH School Account Statement (Monthly).
THSNPFOP	COD	School	TEACH SSN/Name/Date of Birth Change Report.
THSYyyOP	COD	School	TEACH School Account Statement (YTD).

For information about the format of TQ.IMP files for COD Export jobs, see Record File Layout for TQ.IMP File.

Record File Layout for TQ.IMP File

The format of TQ.IMP files for COD Export jobs follows the record file layout specified by EDconnect.

For additional information regarding the record file layout, refer to the EDconnect 8.X Installation & User Guide.

Header Record

Field Number	Description	Type	Required	Length	Position
1	Serial Number	Numeric	No	4	1-4
2	Return Code	Numeric	No	4	5-8
3	Group ID	AlphaNum	No	50	9-58
4	Unattended User ID	AlphaNum	No	50	59-108
5	Encrypted User Password	AlphaNum	Yes	8	109-116
6	Response File Name	AlphaNum	Yes	260	117-377

Data Record

Field Number	Description	Type	Required	Length	Position
1	Serial Number	Numeric	No	4	1-4
2	Return Code	Numeric	No	4	5-8
3	Action	Alpha	No	1	9
4	Message Class	AlphaNum	Yes (Except for Action = T)	8	10-17
5	Fully qualified Path and File Name	AlphaNum	No	260	18-277
6	Batch Number	AlphaNum	No	50	278-327
7*	Mailbox	AlphaNum	No	7	328-334

* Ignored unless Servicer Mode is enabled. Contact the SAIG Help Desk to enable Servicer Mode if it is applicable to your institution.

Export Application Data

Note: Please access Regulatory Help for the latest content about FAFSA, ISIR, and COD processing.

Use the Export Data > Application Data menu option to prepare files to be exported to the Department of Education's (ED) Central Processing System (CPS). The files prepared here are related to Free Applications for Federal Student Aid (FAFSAs) and to Institutional Student Information Records (ISIRs). CampusNexus Student creates files in a directory that is available to EDconnect. EDconnect is a program provided by ED for transmitting and receiving files from the CPS.

Here, you can export FAFSAs, ISIR Corrections, Requests for Duplicate ISIRs, or Signature Update Files. You can import responses to these exported files (ISIRs, ISIR Corrections, and Duplicate ISIRs) from other options within CampusNexus Student. Refer to Export and Import Files for a list of the exported and imported file names.

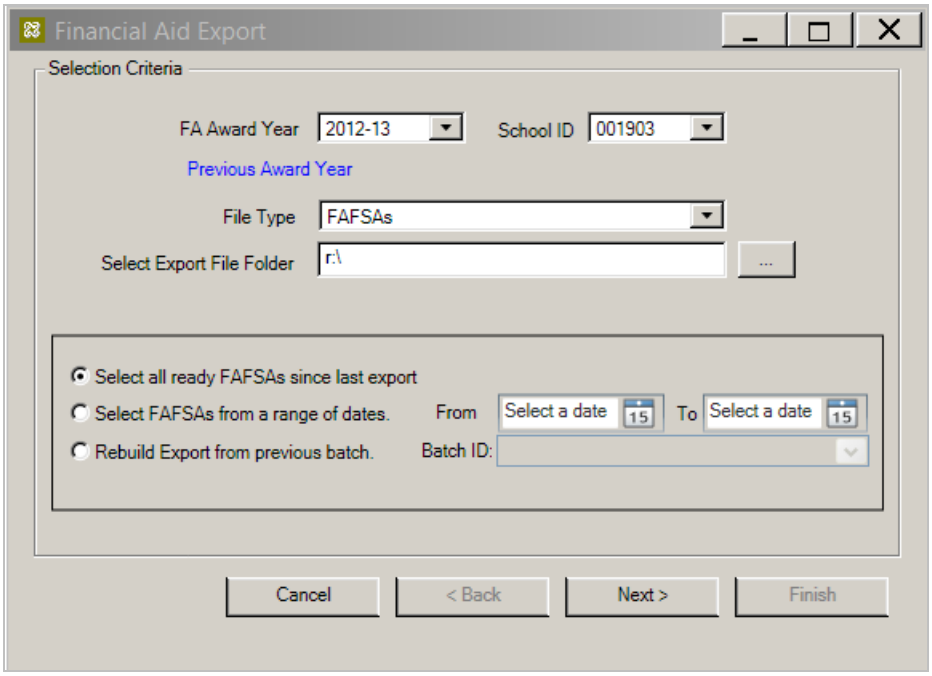
Note: The CPS requires a student's Data Release Number (DRN) on all exported records for ISIR Corrections or Requests for Duplicate ISIRs. Be sure this important data item is correct for each student being processed before you send corrections or requests to the CPS. The DRN can be found on the student's printed Student Aid Report (SAR) if his or her FAFSA has already been processed. The DRN is always included by the CPS on ISIRs you receive in response to FAFSAs you export.

This topic provides the following procedures:

- To export financial aid files for FAFSAs, ISIR Corrections, or Requests for Duplicate ISIRs:
- To export FAFSAs:
- To export ISIR corrections:

To export financial aid files for FAFSAs, ISIR Corrections, or Requests for Duplicate ISIRs:

1. Navigate to **Daily** > **Financial Aid** > **Export Data** > **Application Data**. The Financial Aid Export Wizard for 2012-13 (or 2013-14, depending on your default session settings) is displayed.



2. Click **Previous Award Year** to perform an export on years 2011-12 or before. Select the **Award Year**, **School ID**, and **File Type**. The file types are **FAFSAs** and **ISIR Corrections**. The bottom of the form changes depending on the file type you select.
3. CampusNexus Student displays the previously set up defaults for **Export File Drive** and **Export File Folder**. If

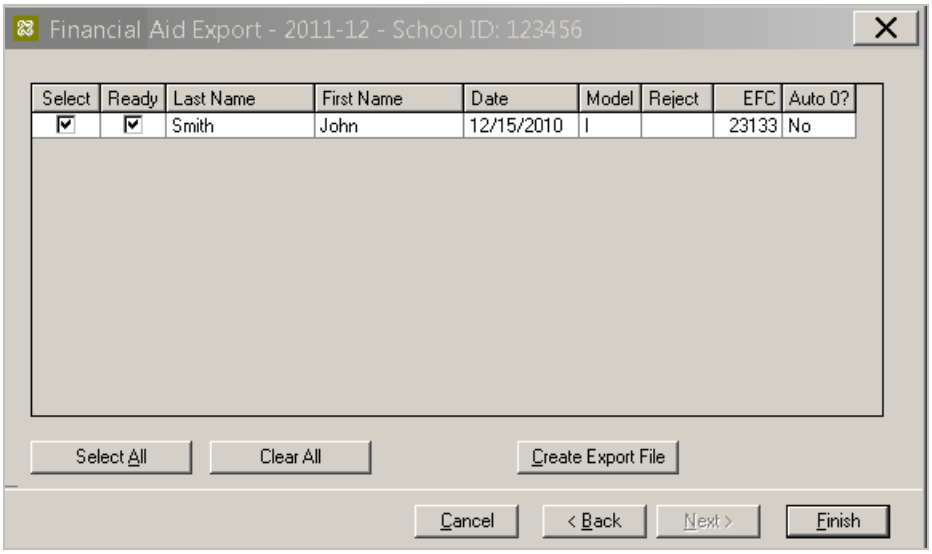
necessary, change them, but it is not recommended. If the directory as defined in the campus setup does not exist, an error message states that the directory does not exist on the specified drive.

4. Continue with the procedure according to the file type you selected in step 2. See the descriptions below for the three file types.

To export FAFSAs:

1. Complete Steps 1 through 4 above.
2. Select all FAFSAs that are ready - OR - FAFSAs from a range of dates.
3. Click **Next**.
4. The wizard shows a list of all the FAFSAs selected for export. The listed records should all display a status of **Ready**.

   Note: FAFSA with **Reject** code of 15 will be accepted for export to CPS.



5. Select any record on the list and disable the **Ready** check box to prevent it from being exported with the others.
6. Click **Select All** to select all the records for export.

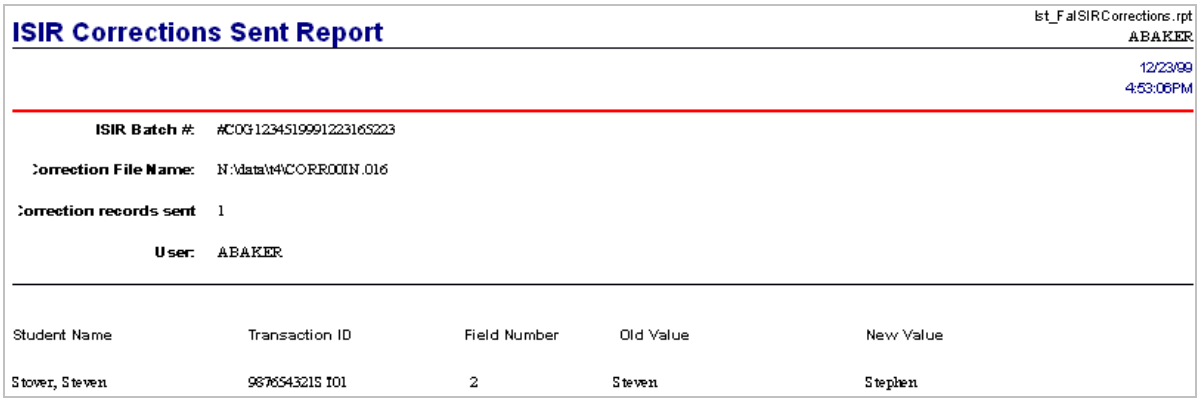
   To exclude a few records out of a long list, click **Select All**, then hold down the **Ctrl** key and click on the ones you do not want to export. They will be deselected.

7. Click **Create Export File**to process the selected records for export. When the export file has been created, CampusNexus Student displays a confirmation message that tells you the location and name of the export file. For example: N:\Data\t4\EAPS00IN.002. CampusNexus Student increments the file name extension each time you run the procedure. In our example, the next time you run the program, the file name will be EAPS00IN.003.
8. Click **OK** to close the message box and the wizard. The program displays a FAFSA Export Report listing the FAFSAs that were exported. Along with the list of FAFSAs, the report displays the details of the export batch: Batch ID, Export File Name, User Name, Date Exported, and Number of FAFSAs included. This report can be reproduced later from the **Reports** > **Financial Aid** menu.
9. If you click **Finish** before clicking **Create Export File**, the wizard closes without exporting any data.

To export ISIR corrections:

1. Complete Steps 1 through 4 above.
2. Select one of the two choices for picking the ISIR Corrections to be exported: **Create New Batch** or **Regenerate Batch**.
3. Click **Next**.
4. A message displays the number of records that will be extracted for export. Click **Yes** to continue or No to abort the extract procedure.
5. A message displays the directory path and name of the file containing the ISIR corrections, for example, N:\data\t4\CORR00IN.016. Click **OK** to acknowledge the message. CampusNexus Student increments the file name extension each time you run the procedure. In our example, the next time you run the program, the file name will be CORR00IN.017.

   Note that files for ISIR corrections and requests for duplicate ISIRs have the same name structure so their extensions are incremented in the same series.
6. The ISIR Corrections Sent Report is displayed.



ISIR Corrections Sent Report

lst_FalSIRCorrections.rpt
ABAKER
12/23/99
4:53:06PM

ISIR Batch #: #COG1234519991223165223
Correction File Name: N:\data\t4\CORR00IN.016
Correction records sent 1
User: ABAKER

Student Name	Transaction ID	Field Number	Old Value	New Value
Stover, Steven	9876543215 I01	2	Steven	Stephen

7. Print the report for future reference.
8. Note that in this case, the **Finish** button is not used. If you click Finish before clicking Create Export File, the wizard will close without exporting any data.
9. Click **Regenerate Batch** to regenerate a batch of ISIR corrections that was previously created. This may be necessary in the unlikely situation where something has happened to the previously created file which makes it unusable.
10. Click **Next**. A list of available batches is displayed.
11. Select the batch to be regenerated by clicking it on the list.
12. Click **Finish**. A message indicates how many records will be extracted.
13. Click **Yes** to continue. The ISIR Corrections Sent Report is displayed.
14. Print the report for future reference. When you close the report, the procedure is completed.

Clearinghouse Export (Pre-2014)

Note: Starting July 1, 2014, a new Clearinghouse Export file format was adapted, and the file format produced by using the Clearinghouse menu selection in CampusNexus Student is no longer valid. Please use the Clearinghouse (2014-2015 and later) menu option, and review Regulatory Help for content associated with this new feature.

Export Direct Loan

CampusNexus Student can prepare files containing Direct Loan information for export to COD. The files that are prepared by CampusNexus Student are placed in a directory of your choosing. Once placed in the designated directory, the files are ready for you to send to COD using the EDconnect software provided by the U.S. Department of Education (ED).

Direct Loans are processed through the COD Export wizard.

The types of files that are exported by CampusNexus Student include:

- Loan Origination (Subsidized and Unsubsidized)
- Loan Origination PLUS
- Loan Origination Changes
- Print Master Promissory Note Manifest
- Print PLUS Promissory Note Manifest
- Disbursements
- Loan Detail

The processing procedures for each of the file types is basically the same. You will select the appropriate options for each file type. The system will gather the necessary data, create the files using the record formats required by the COD, tell you when the files are completed, and where the files are located.

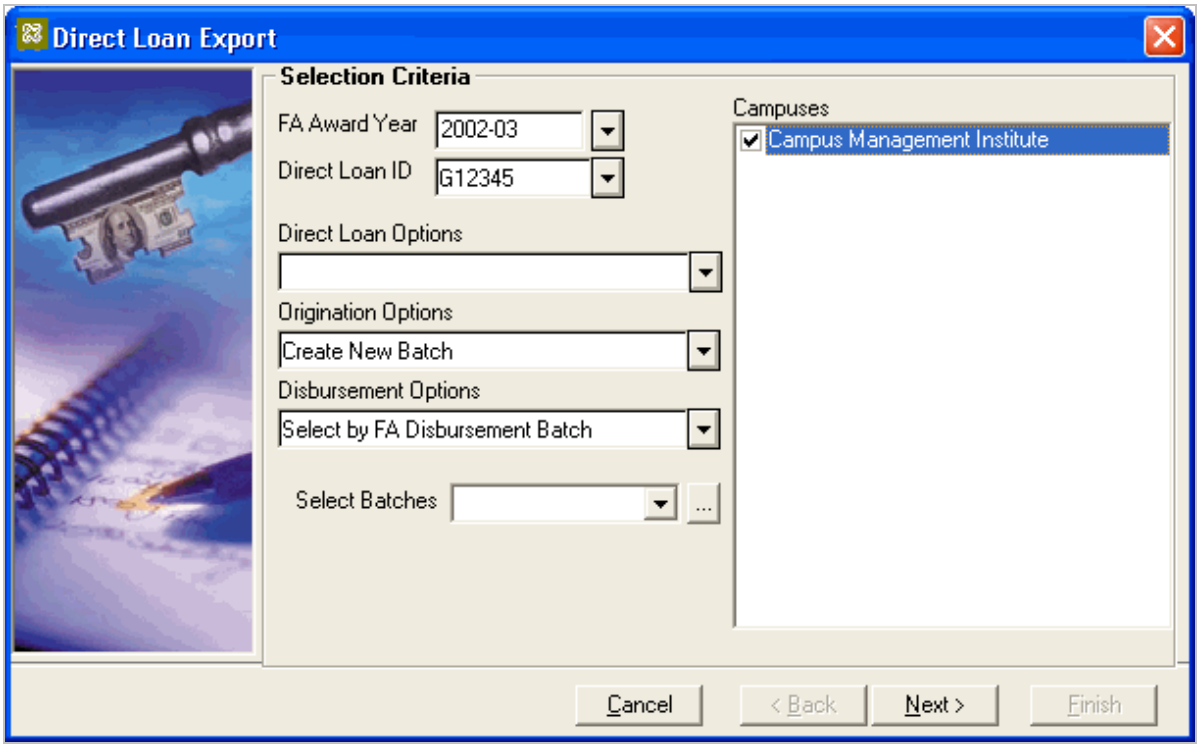
Loan Origination (Subsidized and Unsubsidized)

CampusNexus Student can be used to create the loan origination extract files for subsidized, unsubsidized, and PLUS loans for the 2000-01 award year.

CampusNexus Student can be used to extract the 2001-02 direct loan origination files for transmission to the COD. The forms for creating the 2001-02 origination extract file remain unchanged, as does the layout of the reports generated at the end of the extract. The only changes to the reports are the award-year-specific information.

To export subsidized and unsubsidized loan origination records:

1. Navigate to **Daily > Financial Aid > Export Data > COD**. The Direct Loan Export form is displayed.



2. Select the appropriate **FA Award Year**.
3. Select or verify the **Direct Loan ID**. If yours is a multicampus school, this ID may or may not be the same for all campuses.
4. Select the **Campuses** from which origination records are to be exported. From the campus list, you can specify the campuses for which to extract loans. Based on campus entries selected in the COD Export Wizard Rpt Entity ID field, CampusNexus Student gathers the Direct Loan ID. Only campuses that have the selected direct loan ID will be presented in the list. By default, All campuses will be selected. For example, the direct loan ID G01002 may be the direct loan ID for five campuses. You will then be able to specify which of the five campuses loans will be extracted for.
5. From the list of Direct Loan Options, select **Loan Origination - Sub/Unsub**.
6. From the **Origination Options**, select **Create New Batch** or **Regenerate Batch**.

   Create New Batch

   Direct Loans Added From - Date Added must be within the specified date range.

   Prom Note Status - Print Status must equal the status code specified.

   Expected Grad Date Range - Graduation Date must be within the specified date range.

   Dependency Status - The Student Pell Model must equal the dependency status specified. The model is stored as 1 - Dependent or 2 - Independent.

   College Grade Level - The student's academic year grade level must equal the grade level specified.

   Regenerate Batch If you select this option, you will be presented with a drop-down list showing all batches you can regenerate. When you click Create Export File, each selected loan will be validated according to the Direct Loan Technical Reference manual. Validation will be performed on all fields in the origination record. There are certain fields in the origination record, which, if not valid, will cause the origination record to be rejected at COD.

   Additional information concerning the loans has been added to the window showing direct loans selected for extract. The layout of the grid that is displayed after gathering the loans to extract has been modified. Campus, Last Name, First Name, Status, Loan ID, Type, and Loan Amount are displayed for each loan gathered.
7. Click **Next**. The wizard will display the next page of the procedure. The format of the next page will vary depending on the origination option you choose.
8. Select the next option, **Gather all direct loans with Ready to Send status** or **Gather direct loans that match specific criteria**. For our illustration, we will select the first option.

   Gather Loans Meeting Specified Criteria

   If this option is selected, you are presented with a screen to specify the criteria for which to gather loans. The previous criteria have been modified. The Select Prom Note Print Options has been deleted and replaced with "Prom Note Status". The Prom Note Print Options check box caption has been changed to "Prom Note Status". The drop-down list for Prom Note Status will have the following options:
   - R - Ready to Print
   - P - Printed/Request to Print sent to COD
   - S - Signed and Returned
   - A - Accepted by COD
   - E - Rejected by COD
   - X - Pending at COD
9. Click **Next**. The wizard will select and list direct loan records created since the last export.

10. Click **Add Loan** to add another loan to the list selected by CampusNexus Student. When you click this button, the program will ask for the direct loan ID number for the record you want to add.
11. Select a loan row on the grid and click **Extract?** to toggle the Extract? check box.
12. Once the list is prepared to your satisfaction, click **Create Export File** to create the file. CampusNexus Student will gather the data for the selected records and write the necessary records in the extract file.
13. When CampusNexus Student completes the export file DESF##IN.XXX (where ## is the award year and XXX is a sequential number), it will display a message telling you the directory in which the file was placed and the file name. Write this information down for use with your EDconnect procedure.
14. After the extract file has been prepared, CampusNexus Student produces the related report(s). An error report is generated after the validation is performed on the selected loans. All loans that fail the validation will be listed on the report with the reasons they failed. A report showing the loans included in the extract file will be generated.

    CampusNexus Student updates the appropriate tables after the extract file has been created
15. Click **OK** to close the message and the export wizard.

Loan Origination PLUS

Select this Direct Loan Option to export data concerning PLUS (parent) loans. The resulting file is DEPF##IN.XXX (where ## is the award year and XXX is a sequential number). The export wizard procedures are very similar to the sub/unsub export described earlier in this topic.

Loan Origination Changes

Select this Direct Loan Option to export data concerning loan origination changes. The resulting file is DESC##IN.XXX (where ## is the award year and XXX is a sequential number).

The data for each loan origination change is validated according to the valid field content documented in the Direct Loan Technical Reference manual for the appropriate award year.

Print Master Promissory Note Manifest

Select this Direct Loan Option to print a Master Promissory Note Manifest. This will list prom notes that have been printed and signed by the borrowers. This document certifies that each borrower named on the enclosed notes/disclosures is accepted for enrollment on at least a half-time basis and is making satisfactory progress in a program that is eligible for the loan types awarded. Other certifications are also included on the manifest. The manifest must be signed by the school's Financial Aid Administrator.

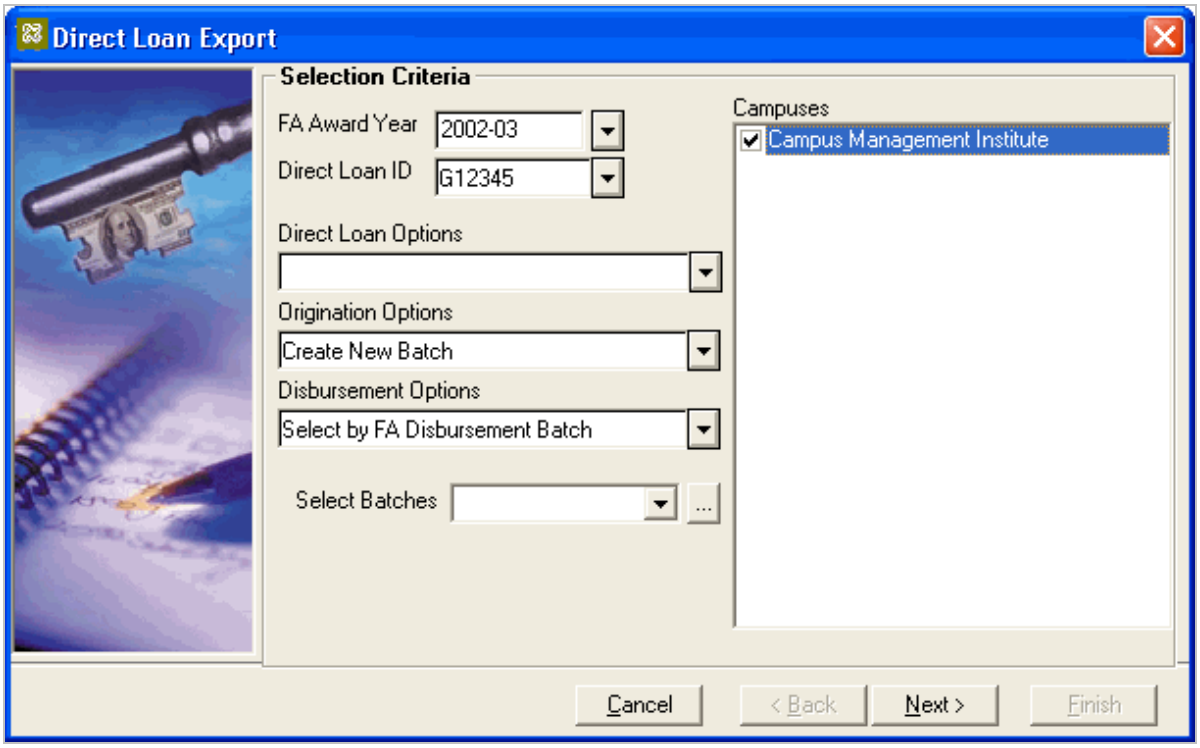
Print PLUS Promissory Note Manifest

Select this Direct Loan Option to print a PLUS Promissory Note Manifest. This will list prom notes that have been printed and signed by the borrowers. This document makes certain certifications and must be signed by the school's Financial Aid Administrator.

Disbursements

To export disbursements:

1. Navigate to **Daily > Financial Aid > Export Data > Export Direct Loan**. The Direct Loan Export form is displayed.



2. Select the appropriate **FA Award Year**.
3. Select or verify the **Direct Loan ID**. If yours is a multi campus school, this ID may or may not be the same for all campuses.
4. Select the **Campuses** from which origination records are to be exported. From the campus list, you can specify the campuses for which to extract loans. Only campuses that have the selected direct loan ID will be presented in the pick list. By default, All campuses will be selected. For example, the direct loan ID G01002 may be the direct loan ID for five campuses. You will then be able to specify for which of the five campuses loans will be extracted.
5. From the list of **Direct Loan Options**, select **Disbursement**.
6. From the **Origination Options**, select **Create New Batch**.
7. From the **Disbursement Options**, select **Select by FA Disbursement Batch**.
8. From the **Select Batches**, select the batches that you want to export.
9. Click **Next**.
10. Select a loan row on the grid and click **Extract?** to toggle the Extract? field.
11. Click **Create Export File**.
12. Click **Finish**.

Once the school has acknowledgement that a completed and signed promissory note is on file, and the borrower meets eligibility requirements, the school can make a loan disbursement to the student or parent (by check or by crediting the student's account). Schools submit a file, DESD##IN.XXX (where ## is the year code and XXX is a sequential number), containing disbursement activity by Loan ID. Each actual disbursement transaction is considered by the COD to be a unique transaction and is treated as such for reconciliation purposes. For example, once a disbursement has been submitted to the COD, any modification to the disbursement amount would require another disbursement record.

The COD edits the disbursement information against the loan origination record data stored on its system. The COD returns an acknowledgement file, DIOD##OP.XXX (where ## is the year code and XXX is a sequential number), to the school indicating whether each disbursement record has been accepted. The school may receive a record from the COD indicating the disbursement record has been rejected. The school needs to resolve the reject, and retransmit it to the COD.

In CampusNexus Student, disbursements must be approved by the Financial Aid department before they are exported to the COD. See Daily > Financial Aid > Approve Disbursements to Pay. The disbursements are actually credited to the students' accounts in the Student Accounts module. See Daily > Student Accounts > Post FA Disbursements.

Loan Detail

The Direct Loan Detail file is sent to COD for reconciling the school's DL records with the COD's. COD compares the data in this file to its database and produces a Loan Detail Exception Report that is sent back to the school. The file that is sent to COD is named DERC##IN.XXX (where ## is the year code and XXX is a sequential number).

Export Pell

Portions of the text in this topic are excerpts from "The Blue Book, Accounting, Recordkeeping, and Reporting by Postsecondary Educational Institutions for Federally Funded Student Financial Aid Programs", U.S. Department of Education, June 1999.

A school's financial aid office is responsible for determining student eligibility for Federal Pell Grants, awarding Federal Pell Grant funds, and authorizing the school's business office to disburse the funds to students or credit student's accounts. Once Federal Pell Grant funds have been disbursed or credited to a student's account, a school is responsible for reporting the student payment information to ED. This may be a function of a school's financial aid office or business office or both offices.

The school reports student payment information to ED through COD. COD enables ED to track a school's need form Federal Pell Grant funds and adjust the school's funding authorization. The system also provides documentation that allows the school to reconcile records of expenditures reported to ED with the school's records of payments made to students.

Once a Pell grant is approved and batched to send to COD, you cannot make changes that would affect the batched data.

Use the **CampusNexus Student Export Pell Wizard** to export all data and requests for data related to the processing of Pell grants for your students. This wizard handles the following types of Pell-related files:

- Origination Records
- Disbursement Records
- Institutional Data Records
- Data Request - Multiple Reporting
- Data Request - Statement of Account
- Data Request - Year to Date

A report of the exported data will be available after the export data is prepared by CampusNexus Student. The format of the report will vary depending on the type of file exported.

Pell grants are now processed through the COD Export wizard.

Origination Records

Origination records:

- include demographic data about the school and, if applicable, its branches,
- report to COD on expected award information about each student who may receive a Federal Pell Grant,
- contain the same information as the payment record,
- must be created before a disbursement can be made,
- may be sent with the initial disbursement record, and
- verify a student's eligibility for a specific annual award amount.

Origination records are not used to obligate funds or post transactions to the school's account. After exporting originations, the status will be set to B - Batched to Send. When a Pell Grant Origination status is "Batched", you will not be allowed to modify any of the information regarding the origination.

Error trapping has been added to check for and deal with fields that have null values.

The system asks if you would like to "include students who have had a change to their enrollment status since the last extract". The default is no. If you answer yes, the system will select only Pell records for the specified Pell ID.

Pell Enrollment Status of "Other"

The logic has been modified behind the question to "include all students where their enrollment status has changed since last being reported" to exclude students where the origination is accepted at a Pell enrollment status of "Other."

The logic used to include students where enrollment status has changed since "last reported" should only effect schools that have true semesters and operate in a college atmosphere where the students select courses at their own pace. This is not always relevant for the vocational schools where students are on a defined course track where credits may vary on a regular basis.

The previous logic selected students based on enrollment status changes that occur in Academic Records. It is not necessary to report these changes for students that have a Pell Enrollment Status set to "Other". The modification to skip students in an "Other" enrollment status will help to prevent sending student records unnecessarily.

The routine has been modified to check Pell Enrollment Status for "O - Other". If the status is "O", the student is not included in the list.

Batch Export Reports

Daily / Financial Aid / Export Data / Pell/COD / Origination Records

The Batch Detail report includes a count of disbursement records in the batch and a sum of the disbursement amounts.

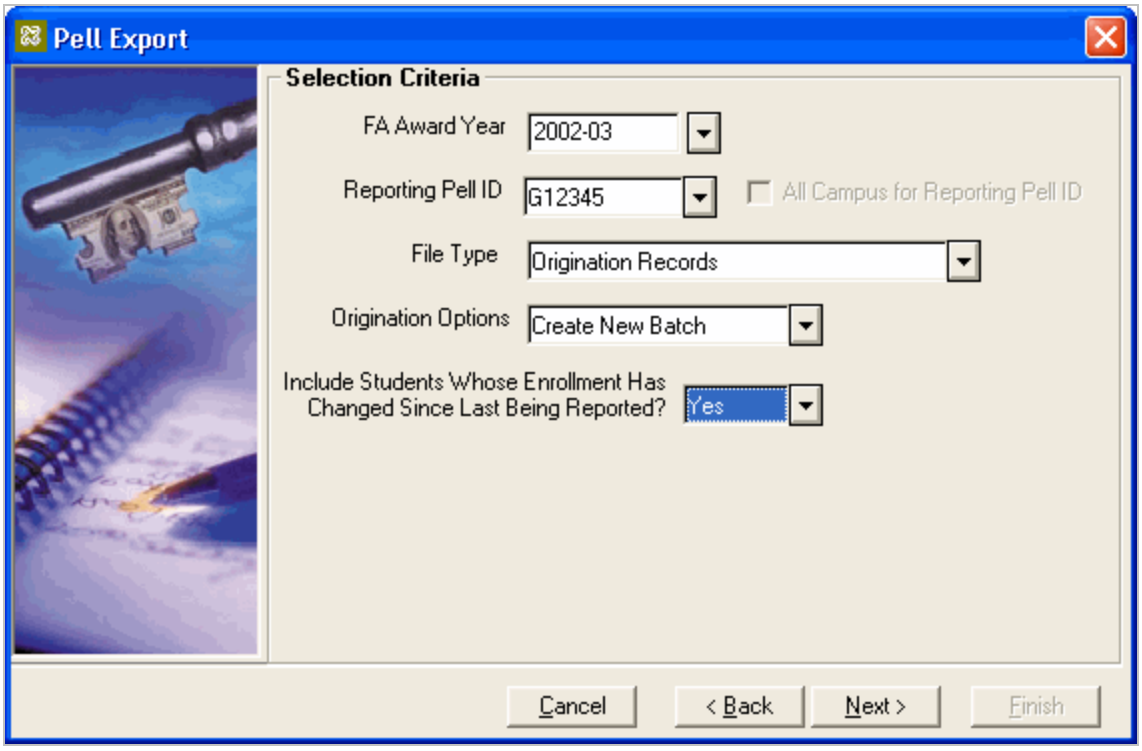
Daily / Financial Aid / Export Data / Pell/COD / Disbursements
Pell/COD Batch Detail Report and Pell/COD/Batch Reject Report

These reports are generated when the Pell/COD export procedure is run. If CampusNexus Student finds rejects, it prints the reject report. Then after finishing, the program prints a report to indicate students included in the batch. The student's campus has been added to the student detail record.

Export Origination Records

To export origination records:

1. Navigate to **Daily** > **Financial Aid** > **Export Data > COD**. The Pell Export wizard is displayed.



2. Select the **FA Award Year** and **Reporting Pell ID**.
3. Select/clear **All Campus for Reporting Pell ID**. This check box is available only when the File Type is Data Request - Reconciliation Record and Data Request - Year to Date. If selected, the main campus and all branches are included. If cleared, only the main campus is included.
4. Select the **File Type** "Origination Records".

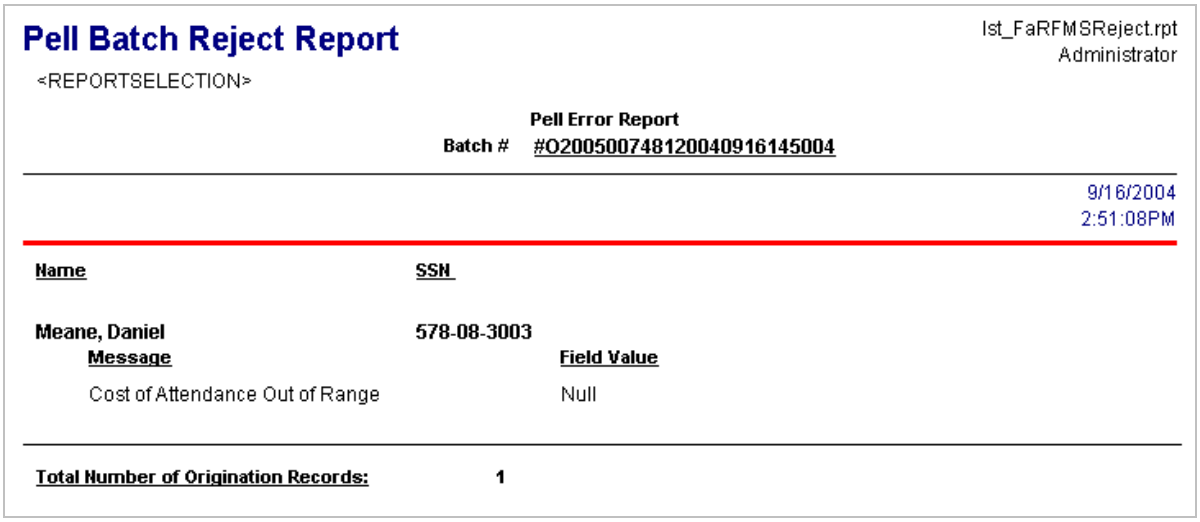
5. Select an **Origination Option**. Either Create New Batch or Regenerate Batch.
6. Answer the question "**Include Students Whose Enrollment Has Changed Since Last Being Reported?**" Yes or No.
7. Click **Next**. Page 2 of the wizard is displayed. It contains a list of the student origination records to be exported.

   On this form, you can add a student to the list, select all student records on the list, clear all records, and create the export file. Use the check boxes to clear students individually.
8. When the list is correct, in other words, contains only the student records for which originations are to be exported, click **Create Export File**.

   CampusNexus Student prepares the export records and store them in the designated System EDE path. If the Campus EDE path is not specified, C:\TEMP is used. A message is displayed to tell you the directory path and the name of the file. The file name will be PGOR##IN.XXX (where ## represents the last two digits of the award year and XXX is a sequential number). Write this information down for future reference.

   CampusNexus Student archives files periodically, based on school-defined rules, thus sparing you of the task of manually archiving after every thousand files. A folder based on date will be created under the system and campus path indicated at the frequency defined, and the files, beginning with the current date, will be moved to that folder.

   If the latest archive directory is older than the frequency setting (Archiving Frequency) in System Settings (e.g. if the setting is "Weekly" and the most recent archive directory is more than a week old, when compared with the current system date), a new archive directory will be created under the System EDE path, using today's date for the archive directory name. If no archive directories exist, the system creates a new one using today's date. All files in the System EDE directory will then be moved into the newly created archive directory.
9. Click **OK** to acknowledge the message. The grid field on the wizard form will be cleared and a **Print** button will be added to the form.
10. Click **Print**. CampusNexus Student prepares a **Pell Batch Reject Report** and a **Pell Batch Report**. Print the reports for future reference. When you close the reports, the export procedure for origination records is complete in CampusNexus Student. The student's campus has been added to the student detail record.
11. Refer to your EDconnect procedures for instructions on transmitting the export file to Pell.



Pell Batch Reject Report

lst_FaRFMSReject.rpt
Administrator

<REPORTSELECTION>

Pell Error Report

Batch # **#O2005007481200409161450O4**

9/16/2004
2:51:08PM

Name	SSN
Meane, Daniel	578-08-3003

Message	Field Value
Cost of Attendance Out of Range	Null

Total Number of Origination Records: 1

Other origination options in the Export Pell wizard are processed in a manner similar to the example above for Origination Records. Just choose the appropriate options for the type of record you want to export. Remember to write down the directory and name of the export files for use with your EDconnect software.

Here, we will describe purpose of the other Pell export options.

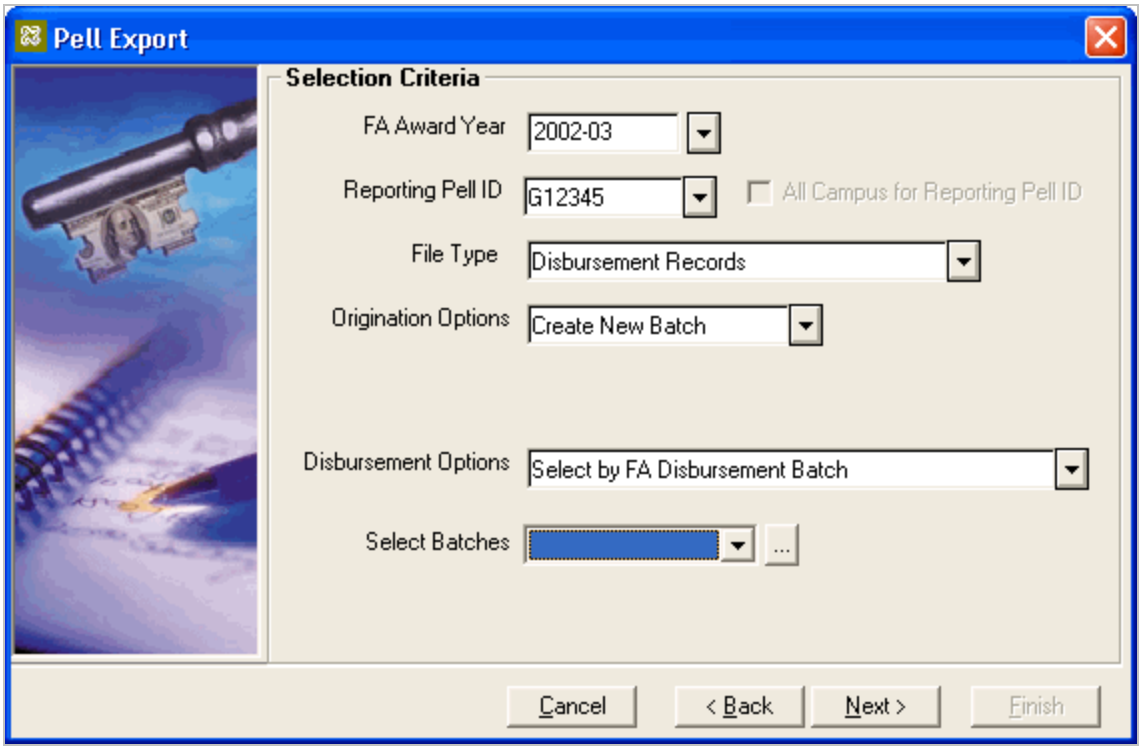
Disbursement Records

Disbursement records:

- report a disbursement, including the actual amount and date, or expected disbursement for each student,
- can be sent to COD up to 30 days before or any time after the actual disbursement (through the end of the award year),
- are submitted with or after the origination record, and
- drive the school's funding level in Grant Administration and Payment System (GAPS).

To export disbursements:

1. Navigate to **Daily** > **Financial Aid** > **Export Data** > **Pell**. The Pell Export wizard is displayed.



2. Select the appropriate **FA Award Year**.
3. Select or verify the **Reporting Pell ID**. If yours is a multi-campus school, this ID may or may not be the same for all campuses.
4. From the list of **File Type,** select **Disbursement Records**.
5. From the **Origination Options**, select **Create New Batch**.
6. From the **Disbursement Options**, select *Select by FA Disbursement Batch*.
7. From the **Select Batches**, select the batches that you want to export.
8. Click **Next**.

9. Select the students files to export.
10. Click **Create Export File**.
11. Click **Finish**.

In CampusNexus Student, the Financial Aid Administrator must approve disbursements to be paid. See Daily > Financial Aid > Approve Disbursements to Pay. The Student Accounts department actually posts the disbursements to the student's ledger card. See Daily > Student Accounts > Post FA Disbursements.

The export file name will be PGDR##IN.XXX (where ## in the award year and XXX is a sequential number).

Note: If the 'Round all Disbursements to whole dollars' check box on the Fund Source Configuration form is cleared and the registry key to allow Pell Cents is enabled, then the exact amount of cents is displayed and saved for the Pell origination amount. The Pell origination amount is processed and saved with the properly calculated amount of cents in regards to Year-Round Pell Additional Eligibility Indicator.

Institutional Data Records

The Institutional Data Record contains demographic information about your school and your Financial Aid Administrator. It can be sent to Pell any time the data changes. The file name will be PGID##IN.XXX (where ## in the award year and XXX is a sequential number).

Information contained in the Institutional Data record includes:

- Pell ID
- DUNS Number
- Institution street mailing address, city, state, and ZIP code
- FAA e-mail address
- Financial Aid Administrator's (FAA) name
- FAA telephone number
- FAA fax number
- Institution type
- Financial control
- Academic calendar
- Weeks of instruction time in program's definition of an academic year
- Credits or clock hours in program's definition of an academic year

Data Request - Multiple Reporting

Once a disbursement record is sent, a Multiple Reporting Record (MRR) is sent automatically (by COD to the school) if a Potential Overpayment Project (POP) or concurrent enrollment occurs.

- POP occurs when two or more schools send a disbursement record for a student and the percentage of the student's Federal Pell Grant eligibility used is greater than 100 percent.
- Concurrent enrollment occurs when two or more schools send in origination records for the same student with enrollment dates within 30 days of each other.

Schools can also request an MRR from COD to obtain information about any other schools that may have submitted origination or disbursement records for their students. Schools can request an MRR six ways:

1. OA - COD provides the school with information about all origination records it has received where the original Social Security Number (SSN) and name code match the origination records the school submitted. *OA* can also be used to find out if other schools have submitted origination records for the school's students.
2. OS - COD returns information about other schools that submitted origination records for selected students. Schools can use this option for transfer students.
3. OI - COD returns information about all students originated at selected schools. Schools might use this option to

specify all records from a school in its area that many of its students transfer to.

4. DA - RFMS provides the school with information about all the disbursement records it has received where the original SSN and name code match the disbursement records the school submitted.
5. DS - COD returns information about other schools that have submitted disbursement records for selected students.
6. DI - COD returns information about all students who had disbursement records submitted at selected schools.

The file name will be PGRQ##IN.XXX (where ## in the award year and XXX is a sequential number).

Data Request - Statement of Account

A school's authorization is the maximum amount of Federal Pell Grant funds it may draw down from the Grant Administration and Payment System (GAPS) to disburse to students. ED reports authorizations to schools in an electronic format called the Electronic Statement of Account (ESOA).

Schools receive an ESOA immediately after GAPS processes the authorization. The ESOA includes a summary with information such as current authorization amounts and year-to-date disbursement amounts. It also includes a status of the account when the last ESOA was sent to the school as well as a detail record that lists each transaction processed between RFMS and GAPS.

The file name will be PGRQ##IN.XXX (where ## in the award year and XXX is a sequential number).

Data Request - Year to Date

Institutions may request YTD records for all students or selected students that are specified in the data request record.

An institution can request YTD records for all the activity posted to the COD database up to the present. COD creates a set of records for every student the institution has reported for the award year. Each student has a year-to-date origination record and year-to-date disbursement record for each disbursement accepted.

YTD data provides summary statistics for:

- all recipients,
- all origination records,
- originations accepted,
- originations accepted with corrections,
- all disbursement records,
- disbursements accepted,
- disbursements accepted with corrections, and
- counts for rejects and warning codes.

The file name will be PGRQ##IN.nnn (where ## in the award year and nnn is a sequential number).

Export to Servicer

Student financial aid data is often processed by third-party providers known as "Servicers". These agents require that the school periodically send records about the current enrollment status of students requiring and receiving financial aid.

In CampusNexus Student, campuses that work with servicers are designated by selection of the servicer and entry of the campus's customer ID number. These entries are found on the Financial Aid tab of the Campus Information form.

Currently, Global is the only servicer to which CampusNexus Student can export enrollment data. As other servicer extract options are completed, the corresponding options will be added.

Global Exports

CampusNexus Student can create three files to be sent to the Global **Weekly Extract**, the **Pre-Pull Extract**, and the **Add-Drop Extract**. CampusNexus Student creates the files according to specifications received from Global.

Note: The global extract definition file contains the Attendance Flag field as a Yes or No field indicating if the student is within the attendance standards or not. This process has been enhanced to incorporate the attendance violation policy evaluation.
A validation has been added within the process that will update the attendance flag in the appropriate global extract files with the appropriate Yes or No value according to the attendance policy that has been pre-established.

While exporting the data, the Global **Weekly Extract**, **Pre-Pull Extract**, and **Add/Drop Extract** will flag a student as being in attendance violation within the extract file if the student is shown to be a member of the student group designated as the Global Attendance Violation group for the school.

This attendance violation lookup will be in effect only if the Attendance Violation Hold Code is configured and the current student under the extract process is the member of a Student Group under Attendance Violation hold. If an attendance violation student group does not exist or is not configured, the system will continue to follow the regular logic for populating the attendance filed in the file.

For the campuses that export data to Global, terms in which data is required to be exported are marked with a Global Extract Term indicator. See Term Code Setup for more information.

Select Global as the Servicer Link on the Campus Information Financial Aid form and enter the school's customer number.

The procedure determines term begin and end dates based on students' enrollment schedules (AdEnrollSched) when more than one term is selected. The weekly extract does not include students who are pre-pulled but not yet included in Add/Drop.

Note: If a Campus Group has more than one campus, students will be extracted from all campuses. In the file sent to Global, each student extracted will be identified by individual Global School ID.

To export data to Global:

1. Navigate to **Daily > Financial Aid > Export Data > Servicers > Global**. Select one of the three extract options: Weekly, Pre-Pull, or Add/Drop.

   #### Weekly Extract

   The Global extract process includes the following features:

   a. Enrollment and NDS-Enrollment status category students will be included in the Weekly Extract as a Future (Global status of 'F'), if they meet the following conditions:

      - They have courses in their student schedule with a course status other than Current, Posted, Dropped, or Scheduled; and
      - Their expected start date is between the minimum start date of the terms selected and the later of the two following dates:
        - Maximum end date of the terms selected, or
        - Date selected to use when calculating the futures to extract.

   b. Applicant Processing status category students will be included in the Weekly Extract as a Future (Global status of 'F') if their Expected Start Date is between the minimum start date of the terms and the later of the two following dates:

      - Maximum end date of the terms selected, or
      - Date selected to use when calculating the futures to extract.

   c. When a term start or end date cannot be determined for a student in an Enrollment or NDS-Enrollment

status category, the Term Start Date and Term End Date in the Global Weekly Extract will both be populated with the student's Expected Start Date.

d. When a term start or end date cannot be determined for a student in an Applicant Processing status category, the Term Start Date and Term End Date in the Global Weekly Extract will both be populated with the student's Expected Start Date.

e. When a term start or end date cannot be determined for a student in a Re-Entry or NDS-Re-entry system status, the Term Start Date and Term End Date in the Global Weekly Extract will both be populated with the student's Expected Start Date.

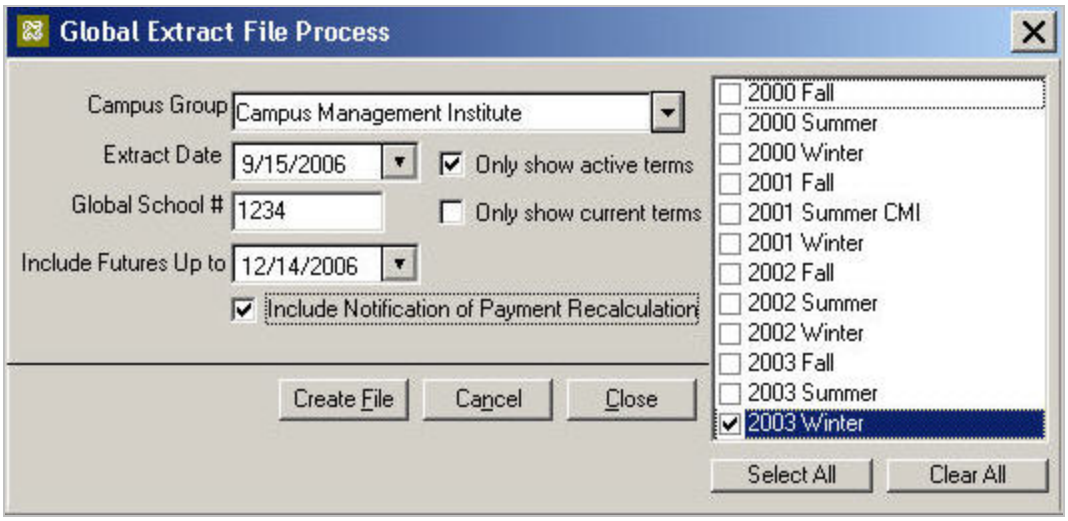
f. The Global Weekly Academic Extract will send a 'T' as the status for students with a System Status of Re-Entry, NDS-Re-Entry, and SPN.

g. The Global Weekly Academic Extract will send a 'T' as the status for students who have multiple enrollments, regardless of the status of the other enrollments.

Note 1: *For Weekly Extract Only:* Students who have a school status in the Enrolled or Applicant system status category will be included in the extract file if their expected start date falls between the earliest term start date and the latest term end date selected by the user. Field data included in the Weekly Extract for students with a school status in the Enrolled or Applicant system status category will be Name, SSN, and the student's Planned Start Date.

Note 2: The Global Weekly Extract will flag a student as being in attendance violation within the extract file if they are a member of the student group designated as the Global Attendance Violation group for the campus. If an attendance violation student group does not exist or is not configured the system will continue to follow the existing logic for populating the attendance filed in the file.

2. The Global Extract File Process form is displayed.



3. Select the **Campus Group** for which student financial aid data is to be extracted.

4. Enter the **Extract Date**.

5. Select the **Terms** for which data is to be exported. Use the "show" options to show the terms from which to select.

   The list of terms includes all records from AdTerm that are in the campus group selected, where the term is designated as a Global term.

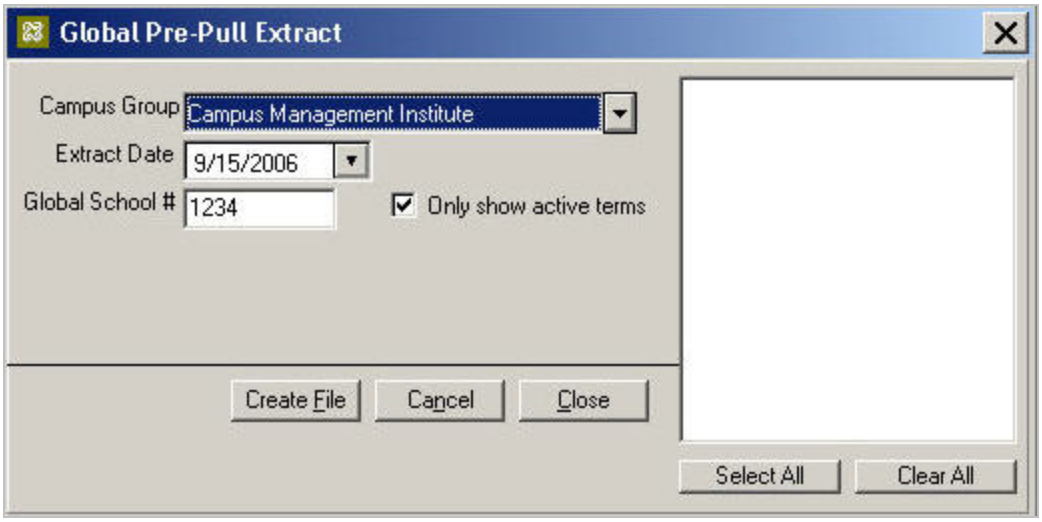
The option to show all current terms will find terms where the begin date is equal to or less than today's date and the end date is equal to or greater than today's date.

6. Enter the **Global School Number** by which Global recognizes data from the Campus Group.
7. Select a date from the **Include Futures Up to** drop-down list. Specify the date up to which the future students has to be extracted in weekly extract. When the Global Weekly Extract is created, CampusNexus Student will include only those future students whose expected start dates fall within that designated time frame. (i.e., between the Extract Date and Date up to which the future students has to be extracted). If the date selected is less than the Extract Date when the Create File button is selected, a message will be presented stating 'Include Futures Up to date should not be less than Extract Date'.
8. Select **Include Notification of Payment Recalculation**, if you want CampusNexus Student to place an asterisk (*) in the ESTES (Estimated Enrollment Status) field of the file. While generating the Weekly Extract file, the system will use the following criteria to determine when the Enrollment Status flag in the extract should be populated.
    a. Include Notification of Payment Recalculation check box must be selected.
    b. Payment Recalculation Notification must be enabled for at least one child term as shown by the 'Schedule Changes Require Payment Notification' check box having been selected on the 'Define Relationships' form for that term.
    c. The configured number of days after the term start date must have elapsed for the particular child term on the 'Define Relationships' form.
    d. The stored scheduled hours for the child term (used in calculating Current Scheduled Hours) must be different than the value last reported for the student for that particular child term.
    e. If the stored scheduled hours (from item d above) are different the difference must be of the particular type of schedule change (increases only, decreases only, both increases & decreases) defined for that term on the 'Define Relationships' form.
9. Click **Create File**. CampusNexus Student processes the extract file and displays a message containing the name of the file created. The file will be placed in the default directory for exporting and importing FA data. See Campus Information Financial Aid tab.
10. Click **OK** to acknowledge the message and finish the procedure. A report will be created to list the extracted data.
11. Follow the instructions provided by Global for transmitting the export file to their data center.

Pre-Pull Extract

The Pre-Pull extract will gather all students currently enrolled in school with a schedule for the selected upcoming terms. Data will be stored in a new table, and used in the subsequent "Add/Drop" Extract.

Note: The Global Pre-Pull Extracts will flag a student as being in attendance violation within the extract file if the student is a member of the student group designated as the Global Attendance Violation group for the campus.



The list of terms includes all records from AdTerm that are in the campus group selected, where AdTerm.GlobalExtractTerm is equal to 1 and AdTerm.StartDate is greater than today's date.

Only Show Active Terms: Check this box to filter the list of terms to include only the active ones.

Extract Date defaults to today's date.

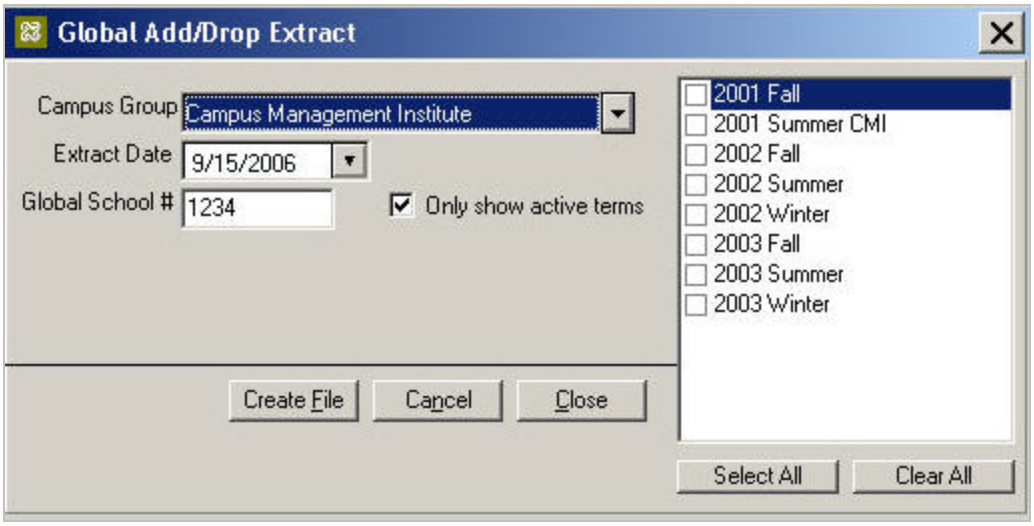
Global School Number defaults to the campus' Servicer School Number.

A report (rpt_FaGlobalPrepull.rpt) is available after the extract is completed. The report shows Student Name, Term Code, Term Begin Date, Term End Date, Start Date, Enrollment Date, Enrollment Status Code, and SAP Flag. At the top of the report it shows TermIDs, Extract Date, and File name.

Add-Drop Extract

The Add/Drop extract will gather all students previously extracted in the Pre-Pull file to submit an update of their enrollment status. The process will use FaGlobalExtractPP to determine which students to include. Terms available will be selected based on the add/drop date defined in the term file.

Note: The Global Add-Drop Extracts will flag a student as being in attendance violation within the extract file if they are a member of the student group designated as the Global Attendance Violation group for the campus.



Select the **Campus Group**. Select the **Terms** (required). The list of terms includes all records from AdTerm that are in the selected campus group, where the Global Extract Term is equal to 1 and today's date is greater than the term's Add-Drop date.

Only Show Active Terms: Check this box to filter the list of terms to include only the active ones.

Extract Date defaults to today's date.

Global School Number defaults to the campus' Servicer School Number.

A report (rpt_FaGlobalAddDrop.rpt) is provided by the extract process. The report shows Student Name, Term Code, Term Begin Date, Term End Date, Start Date, Enrollment Date, Enrollment Status Code, and SAP Flag. At the top of the report, it shows TermIDs, Extract Date, and File name.

State Reporting

The State Reporting menu provides access to the following options:

- Georgia HOPE Scholarship Configuration
- Texas ICUT Reports and THECB-Configuration

HOPE Scholarship Configuration

By default, the HOPE options are disabled. To provide access to users, configure the security options under both the **Daily** menu and the **Reports** menu.

The Georgia State Reporting options are available to users with the necessary security permissions. The **HOPE Scholarship** Program (Helping Outstanding Pupils Educationally) is a merit-based higher education scholarship. The student's ability to pay is not a factor; eligibility is based on the student's academic performance.

The requirements for the student include:

- Being a resident of the state of Georgia for at least one year.
- Graduating from high school with a 3.0 GPA.
- Maintaining a cumulative 3.0 GPA throughout college.

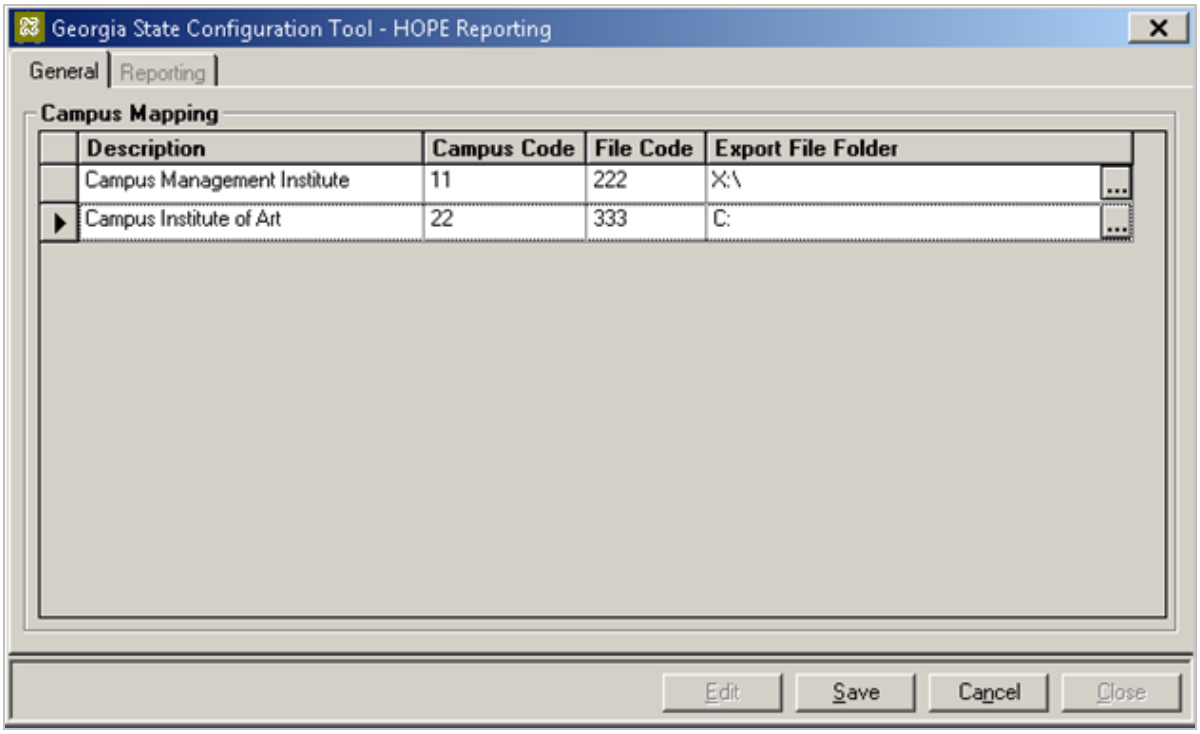
Configuring the HOPE Scholarship

To launch the configuration tool, navigate to **Daily > Financial Aid > Export Data > State Reporting > Georgia > HOPE Configuration**.

General Tab

Campus Mapping

Campus Mapping enables you to map the campuses to a specified file folder, where the export files will be extracted. The grid will only display the campuses where the campus address, configured under Campus Information, has a state equal to 'GA' for Georgia.



HOPE Extract with Campus Code

The State of Georgia has required that all extract files submitted for HOPE processing contain the school's State ID. The Financial Aid (FA) Administrator can enter and save a unique, two-digit state reporting Campus Code to the HOPE Configuration

Tool. This value is saved and stored in the Campus Code column. When the HOPE Extract report is generated the Campus Code is pulled into the HOPE Extract File for processing as required by the State of Georgia.

To configure Campus Mapping:

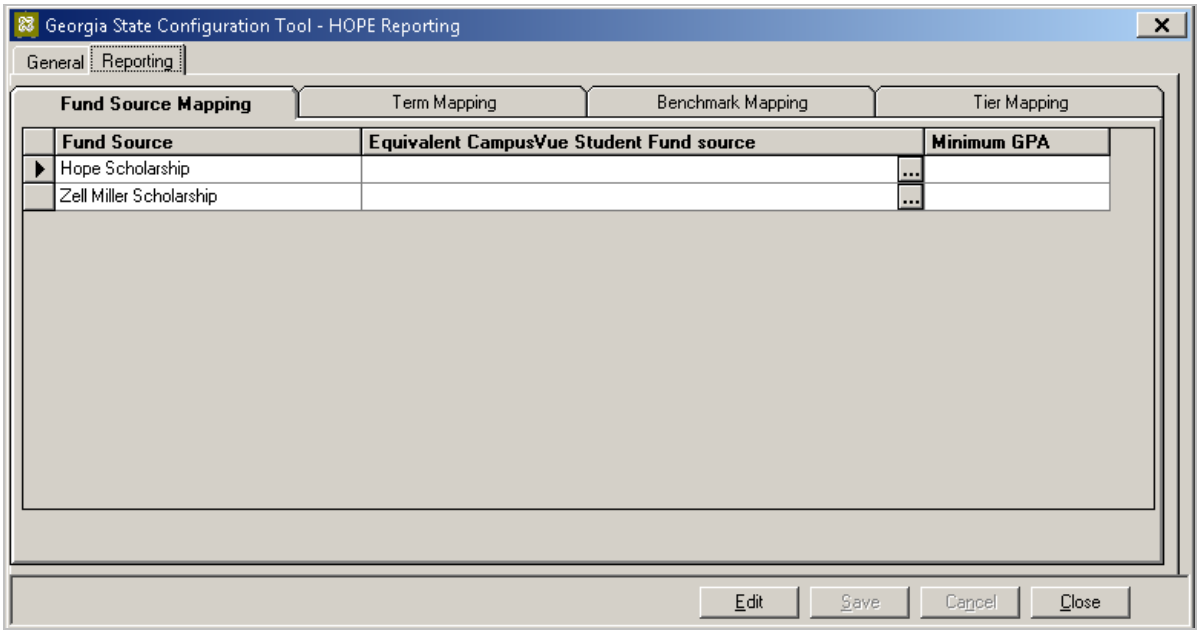
Select the campus to be configured and click the Edit button to allow the export file folder to be set for each campus. Click ... and select the desired folder.

The following buttons apply to all the tabs on this form:

- **Edit** allows you to change or modify the evaluation criteria.
- **Save** allows you to keep the configuration settings.
- **Cancel** enables you to eliminate any changes made.
- **Close** allows you to close the form. Click Save before closing the form to save the configuration settings.

Reporting Tab

Fund Source Mapping



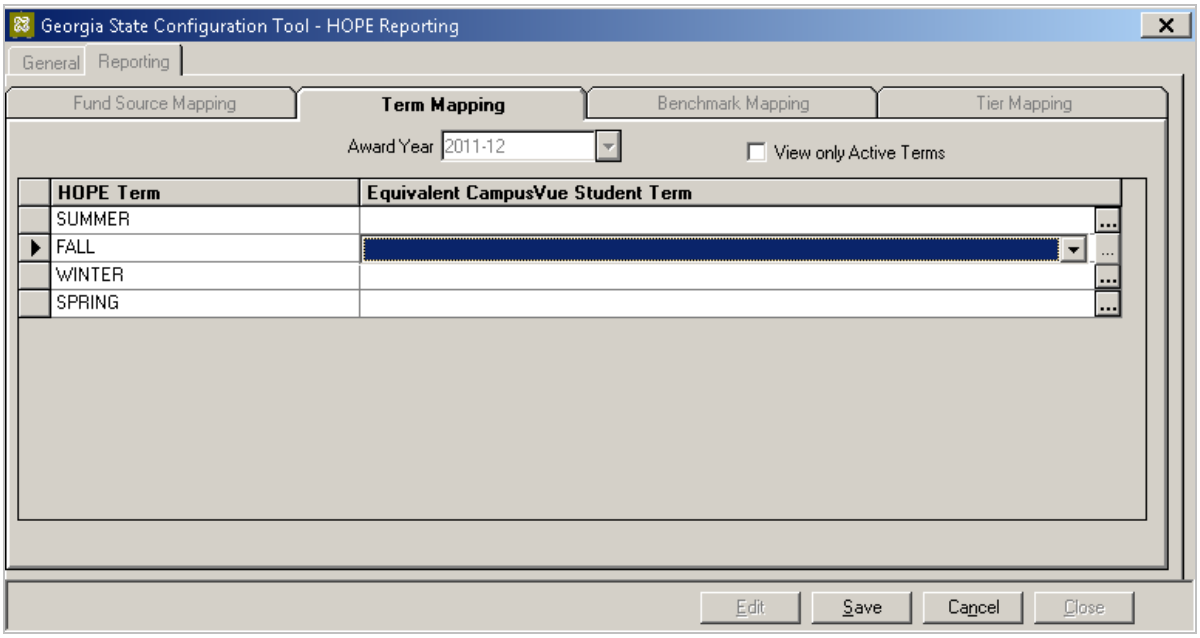
Fund Source Mapping enables you to map the Georgia HOPE Grant to your institution's unique fund source code.

Select the correct fund source and then click the Edit button to specify the fund source code used by your institution for the Georgia HOPE fund or the Georgia Zell Miller fund. Click ... to display a list box containing all fund sources and enter the desired code.

Enter in the Minimum GPA field for each fund source this value will be used to calculate the eligibility status for each fund source within the benchmark evaluation which is displayed on the State Report Evaluation form.

Then click the Save button to save the data.

Term Mapping

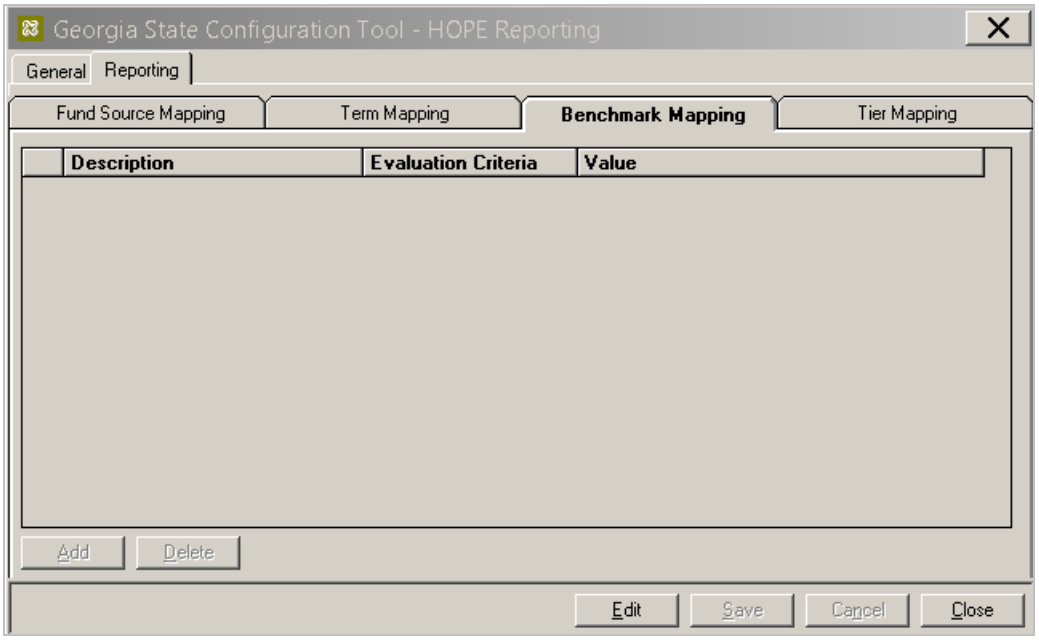


Term Mapping enables you to map the HOPE Term, by award year, to your institution's unique term codes.

Click the **Edit** button to specify the term code used by your institution for the HOPE term, and then click to display a list box containing active and inactive terms. Select the **View only Active Terms** check box to filter the available terms for selection. One or more terms may be selected for each HOPE term. The terms available are parent or standard terms. These terms should correspond to the terms in the HOPE GPA that has been configured. Select the desired terms and click the Save button to save the data.

Note: There are many regulations by the state that begin in Fall 2011. The term that is mapped as Fall 2011 will be used to begin supporting Learning Support Courses and modifications of the calculations of the HOPE GPA.

Benchmark Mapping



Benchmark Mapping enables you to configure Benchmark mapping evaluation criteria for HOPE. The evaluation of the HOPE criteria is at an overall student level, so it crosses all enrollments and campuses for the student.

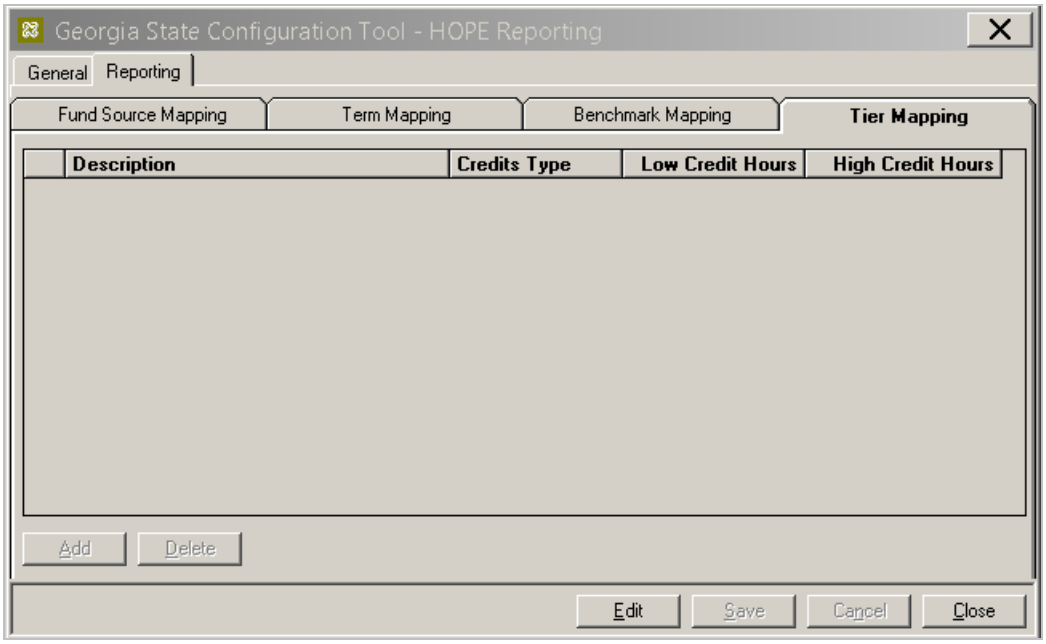
The Benchmark Mapping tab contains a grid consisting of three columns: Description, Evaluation Criteria, and Value.

- **Description** allows you to name the Benchmark.
- **Evaluation Criteria** allows you to select any criteria from the drop-down list, including Selected Terms, Earned Credit Hours, Attempted Credits Hours, Term Begin Date, Term End Date, and Dates.
- **Value** will be dynamically populated based upon your selected criteria in the Evaluation Criteria column. If you select the Term Begin Date, Term End Date, or Date, then you will only be able to enter a date value in the Value column. Likewise, if you choose Selected Terms, then a list of terms, including Summer, Fall, Winter, and Spring, will be populated in the Value column. If you select Earned Credit Hours or Attempted Credit Hours under Evaluation Criteria, then you will only be able to enter numeric values with a decimal in the Value column. The system will store the cumulative total for the credits attempted and the credits earned between each parent/standard term.

The Benchmark Mapping tab also has an **Add** button, which allows you to insert a blank row in the grid, and a **Delete** button, which allows you to remove a selected row from the grid.

To add a new row to the grid on the Benchmark Mapping tab, click the Add button. Enter a Description, select the Evaluation Criteria, and then enter a Value. Click Save to keep your settings.

Tier Mapping



Tier Mapping enables you to configure State Grant evaluation tiers for HOPE. You can configure the range of credits within each tier by credit hour ranges. The evaluation of the HOPE criteria is at an overall student level, so it crosses all enrollments and campuses for the student.

The **Tier Mapping** tab contains a grid consisting of four columns: Description, Credits Type, Low Credit Hours, and High Credit Hours.

- **Description** allows you to name the Tier.
- **Credits Type** allows you to select Attempted and Earned values from the drop-down list.
- **Low Credit Hours** allows you to enter only numeric values; the Low Credit Hours value cannot be greater than the

High Credit Hours value.

- **High Credit Hours** allows you to enter only numeric values.

To add a new row to the grid on the Tier Mapping tab, click the Add button. Enter a Description, select the Credits Type, and then enter the Low Credit range and High Credit range. Click Save to keep your settings.

HOPE Extract

HOPE Scholarship and Zell Miller Scholarship funds from the State of Georgia are disbursed to the school once the school has submitted an invoice to the Georgia Student Finance Commission through the SURFER (Scholarship Up-to-date Records for Electronic Reporting) application software.

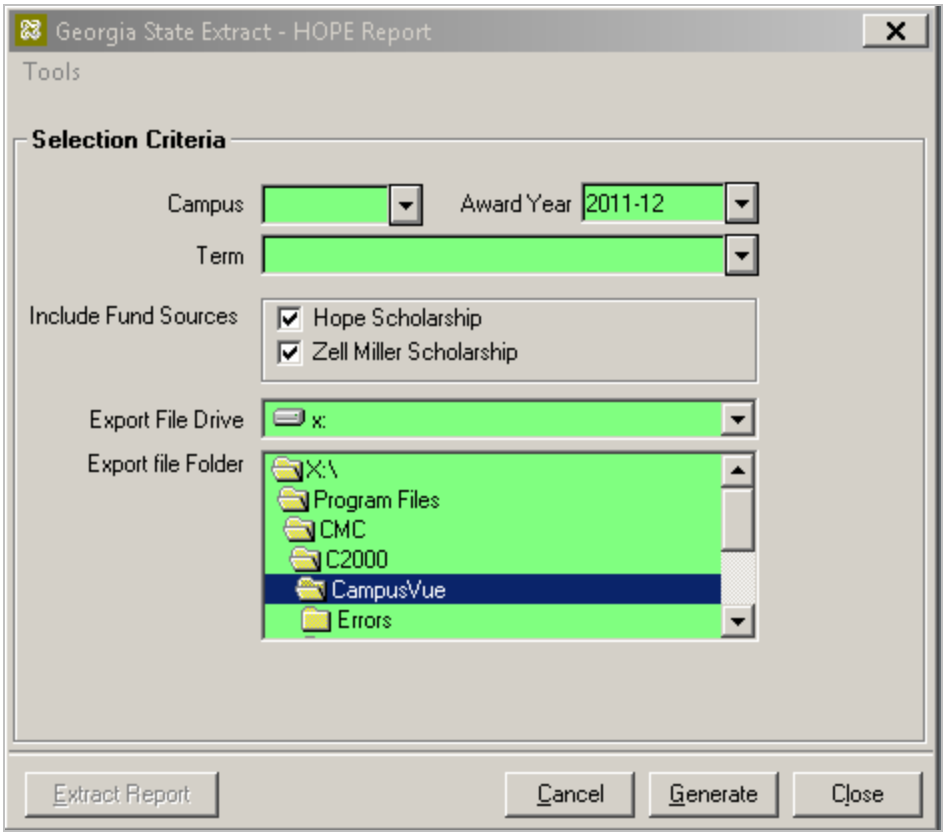
The Hope Extract file includes the Learning Support Hours field, which represents the courses that the student is taking after Fall 2011 that are remedial and are to be excluded for payment. These courses are identified by being configured as Remedial at the course level. The extract process validates if the student has registered for any of these courses for the selected term and, if so, then the credits for the courses are included in the Learning Support Hours field and they are excluded from the Paid Hours field for the selected term. The Learning Support Hours credit hours are then included in the Enrolled Hours field, that contains the total attempted hours for the selected term.

The Georgia State Extract form allows the user to select the awards that they would like included in the extract file that is going to be created. The selection options are: HOPE Scholarship and Zell Miller Scholarship.

CampusNexus Student's HOPE Extract functionality exports the required data fields to a text file. This electronic file is saved to your specified location with the name "INU###.TXT". The hash symbols (#) represent the three-digit code selected prior to export.

In general, there are three basic steps to a successful export:

- Select your criteria.
- Generate the file.
- Extract the data.



1. In the **Georgia State Extract** dialog box, select the following criteria:

    - **Campus**
      The Campus drop-down list displays the campus' File Code, Campus Code, and Campus.

- **Award Year**
  Choose an Award Year.
- **Term**
  Choose a term: Fall, Winter, Spring, or Summer.
- Include Fund Sources

Choose HOPE Scholarship, Zell Miller Scholarship, or both.

- **Export File Drive**
  Select a local or network drive location for the file.
- **Export File Folder**
  Select a folder from the drive selected above.

2. Click **Generate** to run the report based on your selection criteria. The student records are evaluated, extracted, and saved to an electronic file. If successful, a confirmation message displays on your screen.

   Note: The Extract Report button remains dimmed and unavailable until a file is successfully generated.

3. Click **Extract Report** to open the HOPE Extract Report in the report viewer on your screen. You can also open the file from the saved location on your local or network drive. The HOPE Extract report identifies all student records that were sent in the Extract file.

Processing correction record changes

CampusNexus Student will identify students who have had their **tier value changed** since the prior extract of the selected term.

In this situation, CampusNexus Student needs to create a **correction record** for the student for the selected term. The main purpose of the correction record is to adjust the information submitted prior under the old tier value for the student, since **the student should only have one tier value per term**.

Once the correction record has been created for the student, a new record is created within the same file to request the current disbursement amount at the new tier value.

Report Configuration Financial Aid THECB Reports

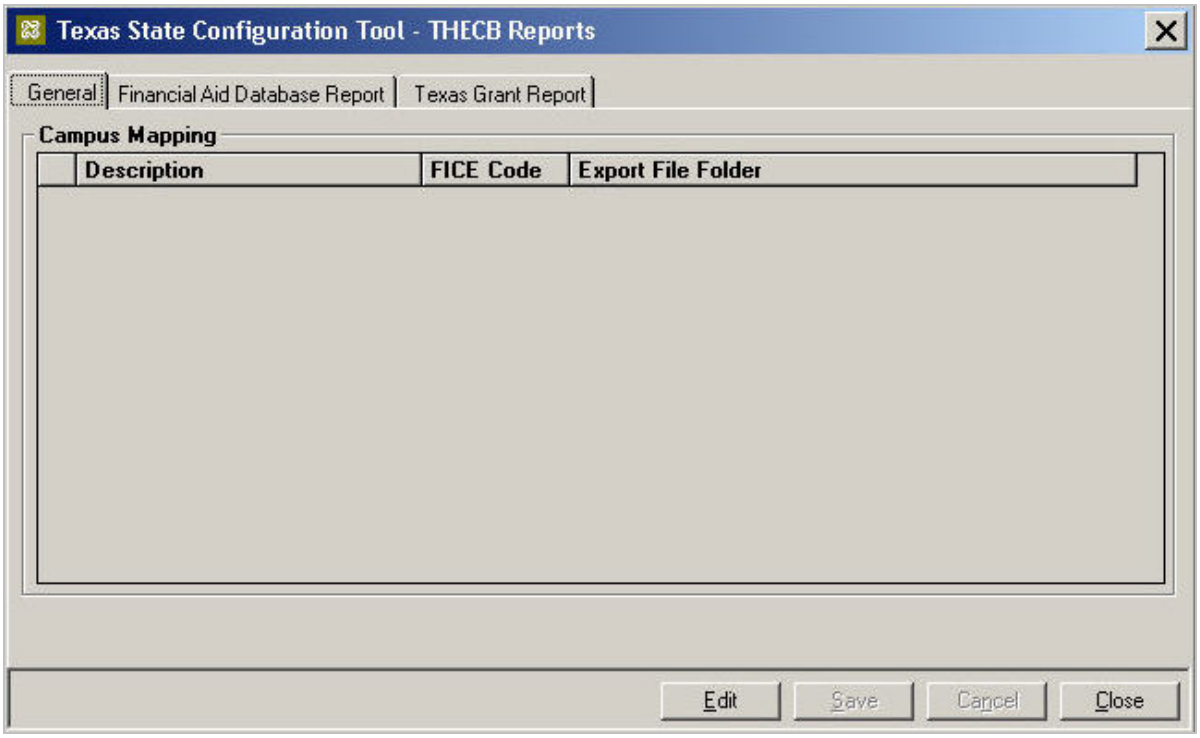
Texas has a Financial Aid Database (FADS) reporting requirement that each participating school must adhere to in order to be able to participate in these programs. The user is required to submit a Financial Aid Database Report to the Texas Higher Education Coordinating Board (THECB).

Texas has a Grant program that has reporting requirements that each participating school must adhere to in order to be able to participate in the grant programs. Clients are required to enter a Texas Grant Student-by-Student Summary Year-End Report to the Texas Higher Education Coordinating Board (THECB) by May 1st of that submittal year and subsequently certified by June 17th of that submittal year. This is a mandatory report entitled Texas Grant Report. Sanctions are imposed if the schools misrepresent information on the report or the report is filed late.

Each THECB report must be configured before it can be generated and extracted.

To configure THECB reports:

1. Navigate to **Daily > Financial Aid > Export Data > State Reporting > Texas > THECB-Configuration**.



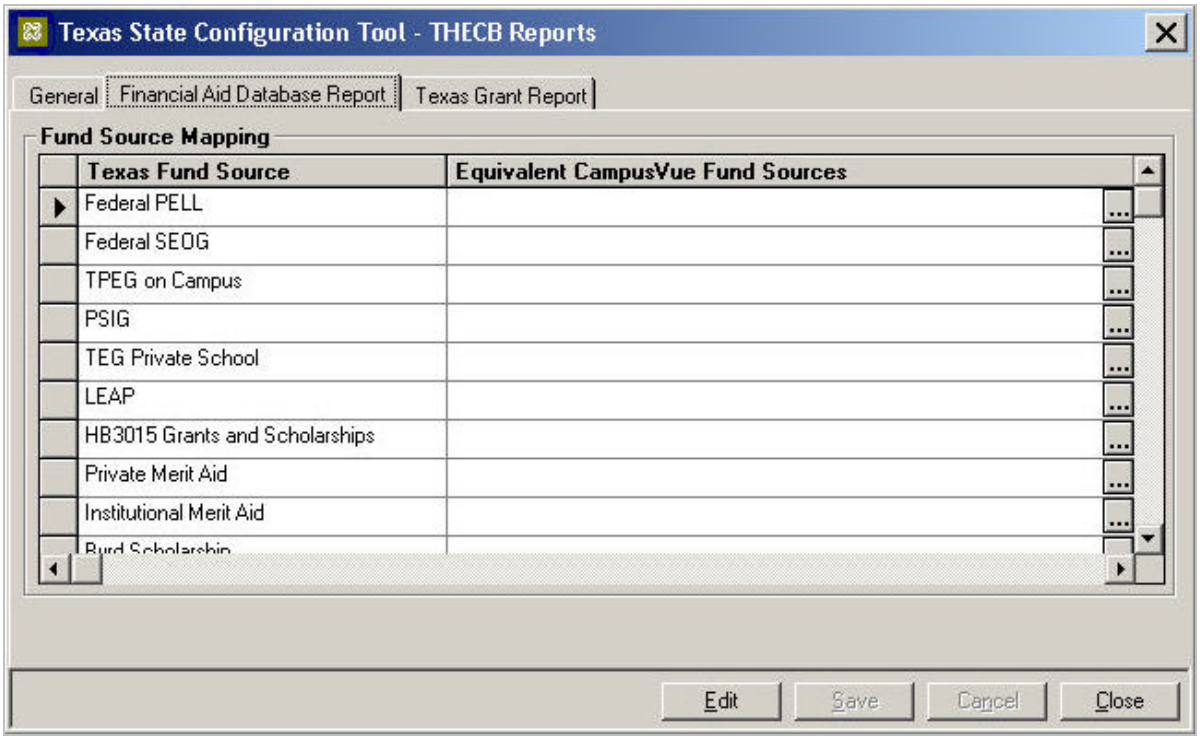
2. On the General tab, a list of campuses with their associated FICE Codes and Export File Folder is available for selection. Select the campus to map and click the **Save** button or you can click the **Edit** button to modify any of the Campus Mapping listings or click the **Cancel** to restore the information. More than one campus can have the same FICE code. Click ... to specify the path where the export file will be placed once it is generated.

   Note: An information message will appear if the FICE code is not numeric or the length of the FICE code that you entered is not six digits.

3. On the Financial Aid Database Report tab, select the appropriate fund source listed in the Equivalent CampusNexus Student Fund Sources in the right-hand column and match it with the appropriate "Fund Sources" for your state in the left-hand column. The same CampusNexus Student Fund Source can be mapped to different State Fund Sources. If there are no listings for Equivalent CampusNexus Student Fund Sources, click ... and

make a selection.

4. Click **Save** button to save the mapping between State Fund Sources and CampusNexus Student Fund Sources.

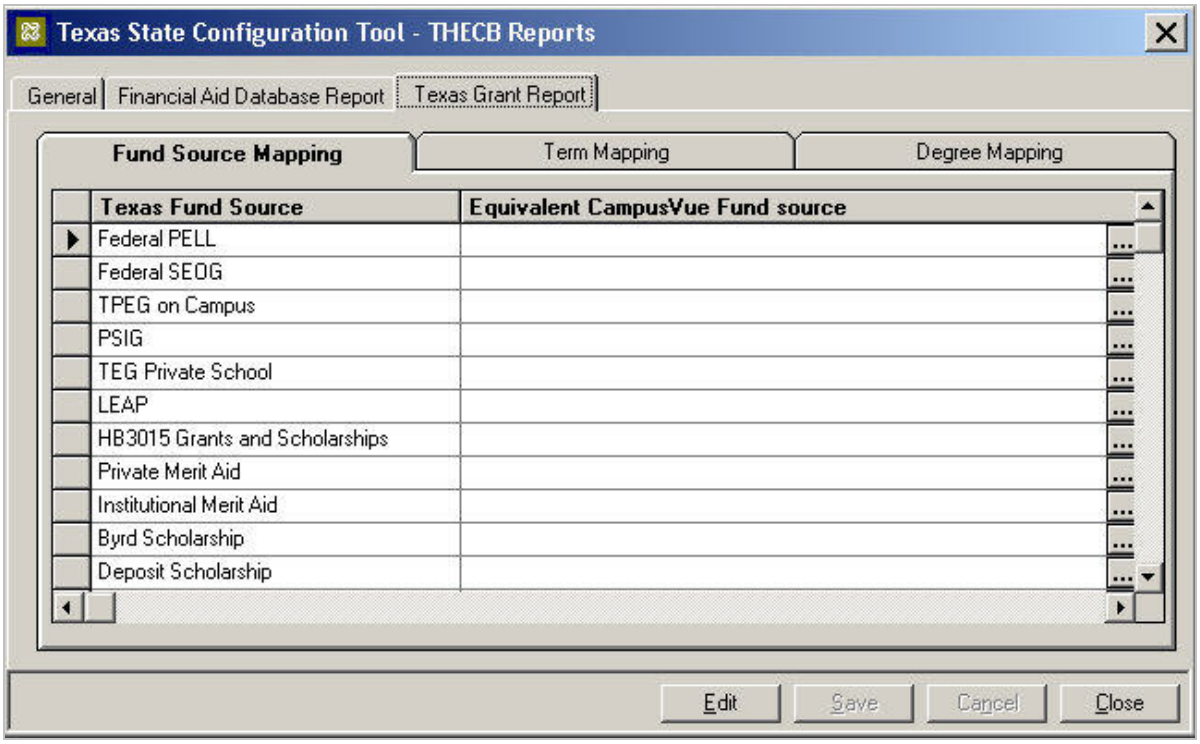


Note: A message will appear if you attempt to exit the window without associating at least one CampusNexus Student Fund Source with a State Fund Source. If you do not want to finish configuring the report, click **Cancel** and **Close**. To finish configuring the report, select the campus fund sources and associate them with the state fund sources.

Texas Grant Report

To Configure the Texas Grant Report:

1. On Fund Source Mapping tab, select the appropriate fund source listed in the Equivalent CampusNexus Student Fund Sources in the right-hand column and match it with the appropriate "Fund Sources" for your state in the left-hand column. The same CampusNexus Student Fund Source can be mapped to different State Fund Sources. If there are no listings for Equivalent CampusNexus Student Fund Sources, click and make a selection.



2. Click the **Term Mapping** tab to associate Texas Terms with equivalent CampusNexus Student Terms.
3. Select the **Award Year** that you would like to map.
4. Select the appropriate Term listed in the Equivalent CampusNexus Student Term in the right-hand column and match it with the appropriate Texas Term in the left-hand column. The same CampusNexus Student Term can be mapped to different Texas Terms. If there are no listings for Equivalent CampusNexus Student Terms, click ... and make a selection.
5. Click **Save** to save the mapping options selected.
6. Click the **Degree Mapping** tab to associate Texas Degrees with equivalent CampusNexus Student Degrees.
7. Select the **Award Year** that you would like to map.
8. Select the appropriate Degree listed in the Equivalent CampusNexus Student Degree in the right-hand column and match it with the appropriate Texas Degree in the left-hand column. The same CampusNexus Student Degree can be mapped to different Texas Degrees. If there are no listings for Equivalent CampusNexus Student Degrees, click ... and make a selection.
9. Click **Save** to save the mapping options selected.

   Note: A Warning! message will appear if you attempt to save mappings without associating at least one CampusNexus Student Degree with a

   - Texas State Fund Source,
   - Texas State Term, and
   - Texas State Degree.

If you do not want to finish configuring the report, click **Cancel** and **Close** to exit the window. To finish configuring the report, select a Texas State Fund Source, Term, and Degree.

See Report Extract Financial Aid THECB Reports for information regarding extracting and generating the Financial Aid Database report.

Report Extract Financial Aid THECB Reports

Texas has a Financial Aid Database (FADS) reporting requirement that each participating school must adhere to in order to be able to participate in these programs. The user was required to submit a Financial Aid Database Report to Texas Higher Education Coordinating Board (THECB).

Texas has a Grant program that has reporting requirements that each participating school must adhere to in order to be able to participate in the grant programs. Clients are required to enter a Texas Grant Student-by-Student Summary Year-End Report to the Texas Higher Education Coordinating Board (THECB) by May 1st of that submittal year and subsequently certified by June 17th of that submittal year. This is a mandatory report entitled Texas Grant Report. Sanctions are imposed if the schools misrepresent information on the report or the report is filed late.

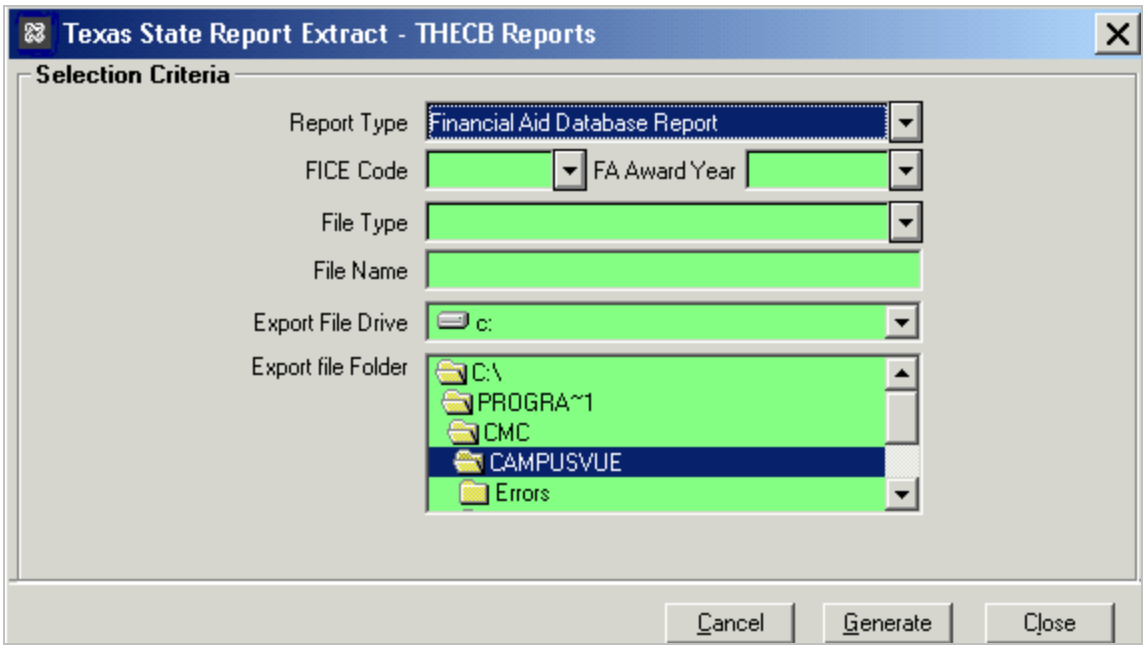
Each THECB report must be configured before it can be extracted and generated. Follow the Configuration for THECB Reports instructions before attempting to extract and generate ICUT reports.

The Report Extract tool can be accessed by selecting **Daily > Financial Aid > Export Data > State Reporting > THECB-Extract**.

The Texas State Report Extract - THECB Reports screen will appear.

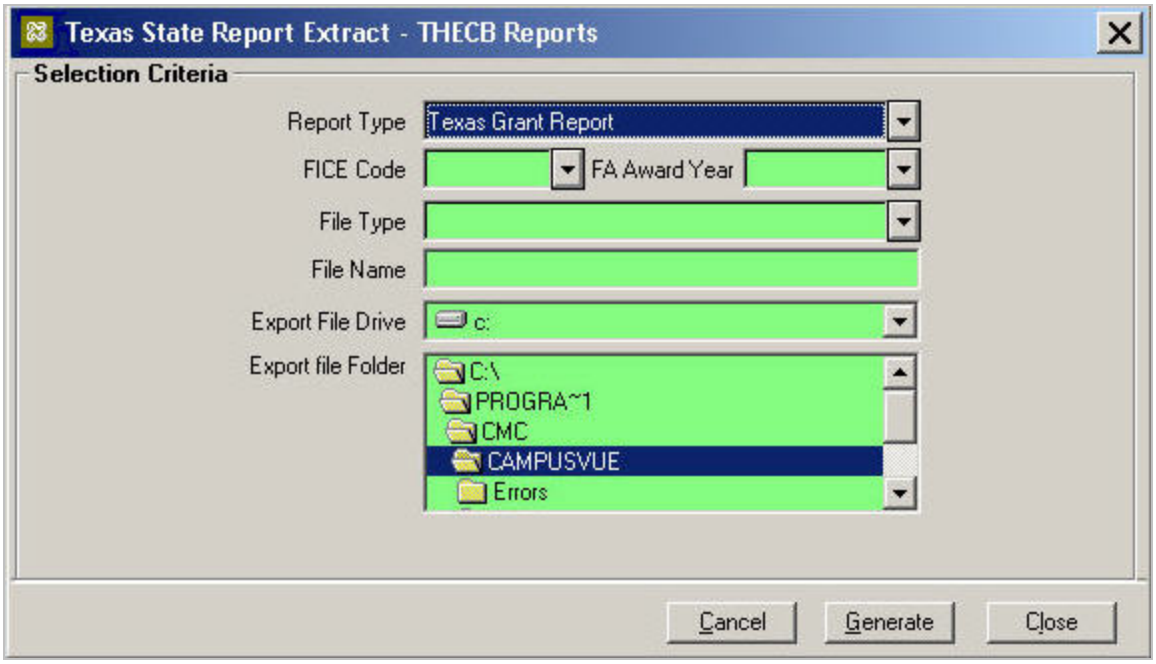
Financial Aid Database Report

1. Select the "Financial Aid Database Report" from the "Report Type" drop-down list.
2. Select the "FICE Code" from the drop-down list.
3. Select the appropriate "FA Award Year" dates from the drop-down list of dates.
4. Select the "File Type" from the drop-down list.
5. Enter the filename to indicate the location where the Financial Aid Database resides.
6. Select the appropriate "Export File Drive" from the drop-down list.
7. Select the appropriate "Export File Folder" from the drop-down list to indicate where you would like the report to be stored.
8. Click the "Generate" button to generate the report.



Texas Grant Report

1. Select the "Texas Grant Report" from the "Report Type" drop-down list.
2. Select the "FICE Code" from the drop-down list.
3. Select the appropriate "FA Award Year" dates from the drop-down list of dates.
4. Select the "File Type" from the drop-down list.
5. Enter the filename to indicate the location where the Financial Aid Database resides.
6. Select the appropriate "Export File Drive" from the drop-down list.
7. Select the appropriate "Export File Folder" from the drop-down list to indicate where you would like the report to be stored.
8. Click the "Generate" button to generate the report.



Click the **Close** button to exit the screen.

Note: Clicking the "Cancel" button will set the form back to its initially loaded state.

Report Configuration Financial Aid ICUT Reports

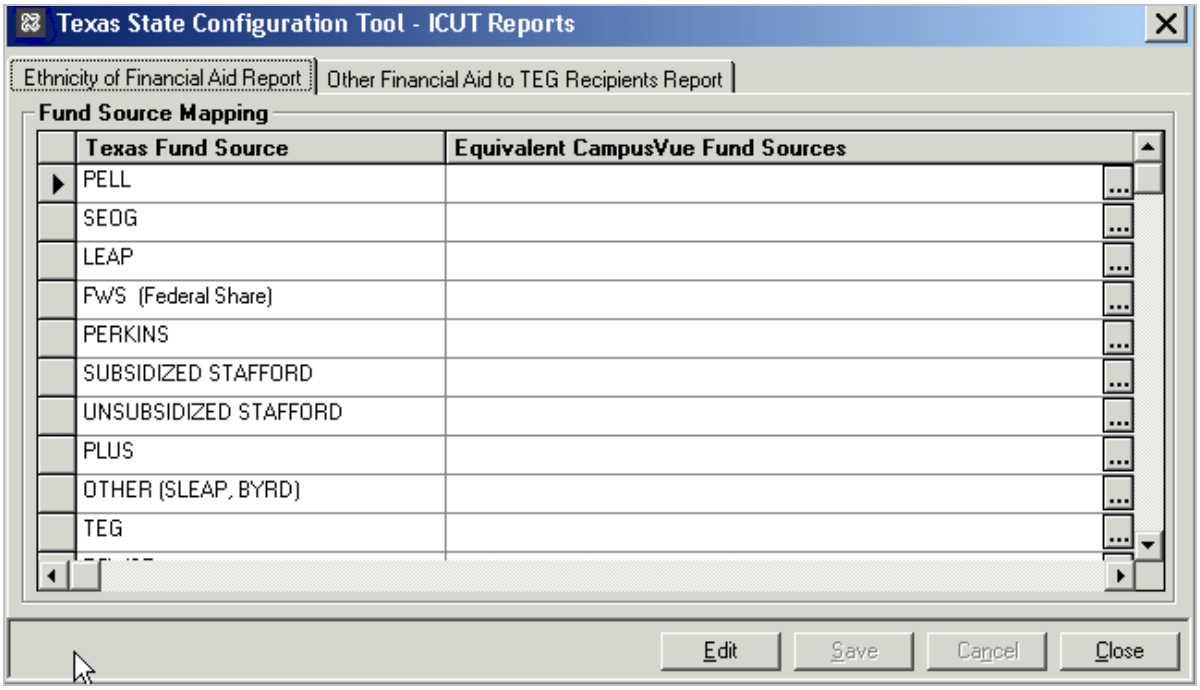
Each Financial Aid ICUT report must be configured before it can be generated. The configuration tool can be accessed by selecting **Daily > Financial Aid > Export Data > State Reporting > Texas > ICUT-Configuration**.

The configuration screen will provide tabs at the top of the screen. There should be one tab for each state report. Select the tab for the report you would like to configure.

Ethnicity of Financial Aid Report Configuration

To Configure the "Ethnicity of Financial Aid Report":

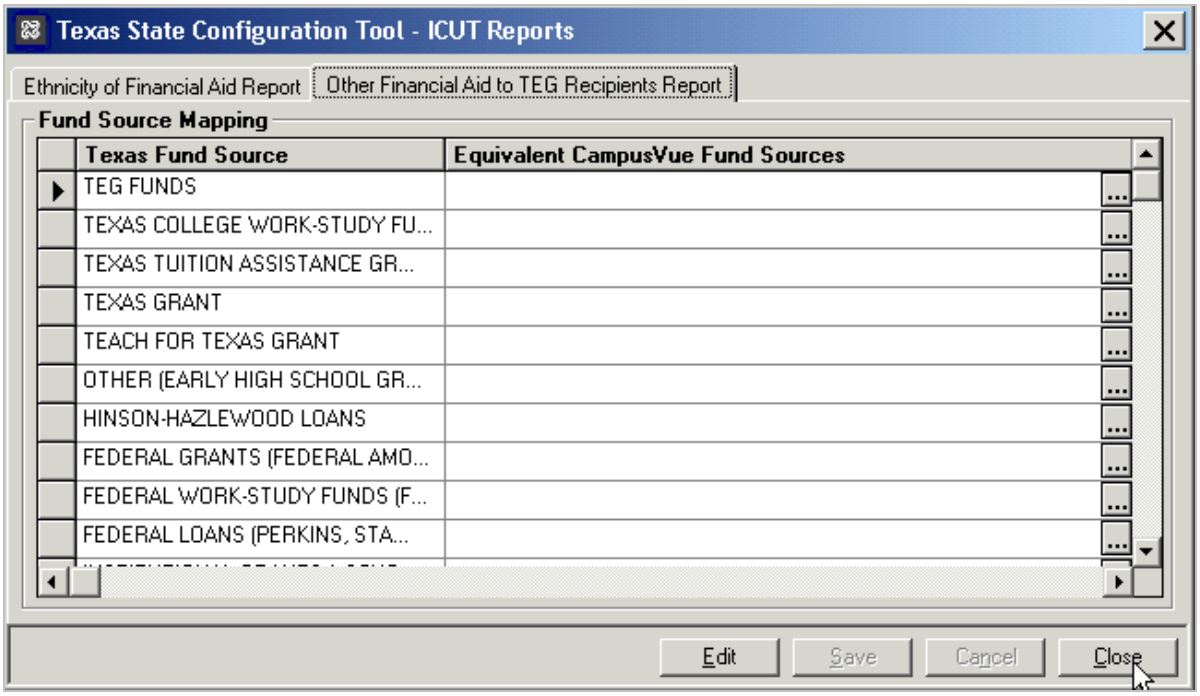
1. Select the appropriate fund source listed in the Equivalent CampusNexus Student Fund Sources in the right-hand column and match it with the appropriate "Fund Sources" for your state in the left-hand column. The same CampusNexus Student Fund Source can be mapped to different State Fund Sources. If there are no listings for Equivalent CampusNexus Student Fund Sources, click ... and make a selection.
2. Click **Save** to save the mapping between State Fund Sources and CampusNexus Student Fund Sources.



Other Financial Aid to TEG Recipients Report Configuration

To Configure the "Other Financial Aid to TEG Recipients Report":

1. Select the appropriate fund source listed in the Equivalent CampusNexus Student Fund Sources in the right-hand column and match it with the appropriate "Fund Sources" for your state in the left-hand column. The same CampusNexus Student Fund Source can be mapped to different State Fund Sources. If there are no listings for Equivalent CampusNexus Student Fund Sources, click ... and make a selection.
2. Click **Save** to save the mapping between State Fund Sources and CampusNexus Student Fund Sources.



Note: A message will appear if you attempt to exit the window without associating at least one CampusNexus Student Fund Source with a State Fund Source. If you do not want to finish configuring the report, click **Cancel** and **Close**. To finish configuring the report, select the campus fund sources and associate them with the state fund sources.

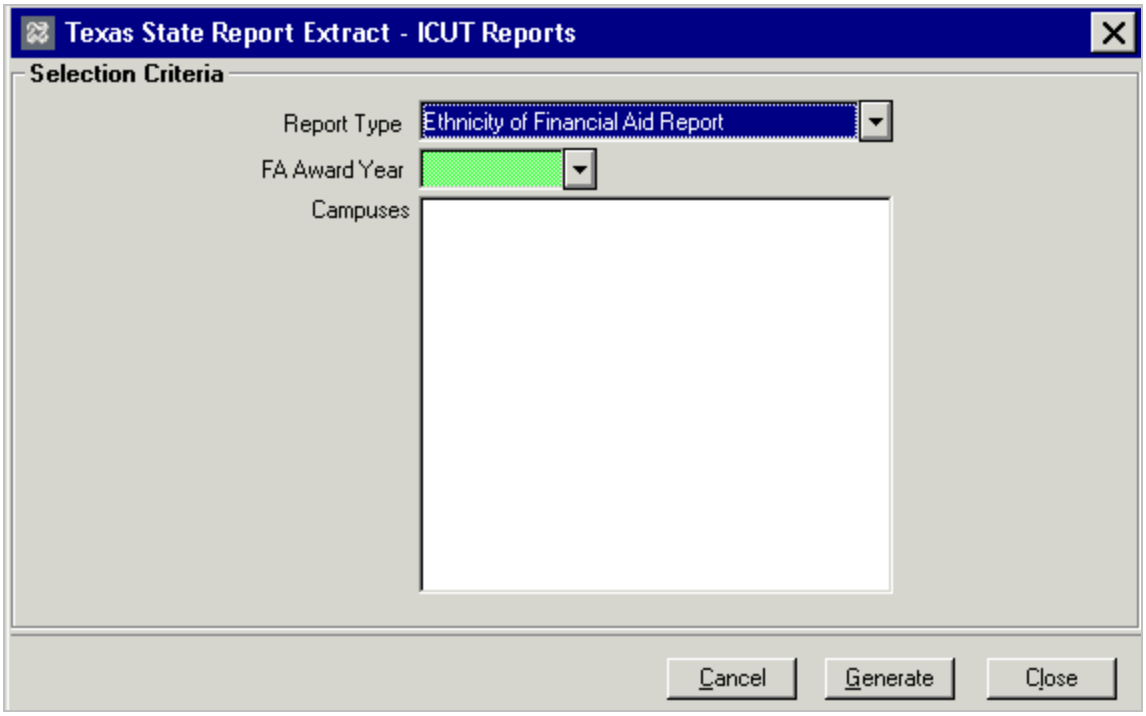
See Report Extract Financial Aid ICUT Reports for information regarding extracting and generating the Ethnicity of Financial Aid Report Configuration and Other Financial Aid to TEG Recipients Report Configuration reports.

Report Extract Financial Aid ICUT Reports

Each ICUT report for Financial Aid must be configured before it can be generated. Follow the Report Configuration Financial Aid ICUT Reporting instructions before attempting to extract and generate ICUT reports.

To access the Report Extract tool, navigate to **Daily > Financial Aid > Export Data > State Reporting > Texas > ICUT-Extract** .

The Texas State Report Extract - ICUT Reports form is displayed.



Ethnicity of Financial Aid Report

1. Select the "Ethnicity of Financial Aid Report" from the "Report Type" drop-down list.
2. Select the appropriate "FA Award Year" dates from the drop-down list of dates.
3. Select the campuses that you would like to be included in the ICUT report.
4. Click the "Generate" button to generate the Ethnicity of Financial Aid Report.

Other Financial Aid to TEG Recipients Report

1. Select the "Other Financial Aid to TEG Recipients Report" from the "Report Type" drop-down list.
2. Select the appropriate "FA Award Year" dates from the drop-down list of dates.
3. Select the campuses that you would like to be included in the ICUT report.
4. Click the "Generate" button to generate the Other Financial Aid to TEG Recipients report.

Note: Clicking the "Cancel" button will set the form back to its initially loaded state.

ICUT Reports

The Independent Colleges and Universities for Texas (ICUT) reports for Financial Aid must be configured before the reports can be extracted and generated.

To configure the ICUT reports:

1. Navigate to **Daily > Financial Aid > Export Data > State Reporting > Texas > ICUT Configuration**.
2. To extract and generate the reports, navigate to **Daily > Financial Aid > Export Data > State Reporting > Texas > ICUT Extract** .

See also Configuration Tools for ICUT Reporting and Report Extract Tool for ICUT Reporting for Financial Aid.

COD Export (2010-11 and prior award years)

Note: Please access Regulatory Help for the latest content about FAFSA, ISIR, and COD processing.

This form is used to provide information required by the Common Origination and Disbursement (COD) program **for award years 2010-11 and earlier**. See also COD, COD Import, COD grants, COD Exceptions, Pell Import, Pell Export, Direct Loan Import, Direct Loan Export, and Financial Aid Reports for additional information.

Note: For information on the legacy Pell and Direct Loan system and changes made for the current year including new edit codes and warning codes, refer to the FSA Technical Reference.

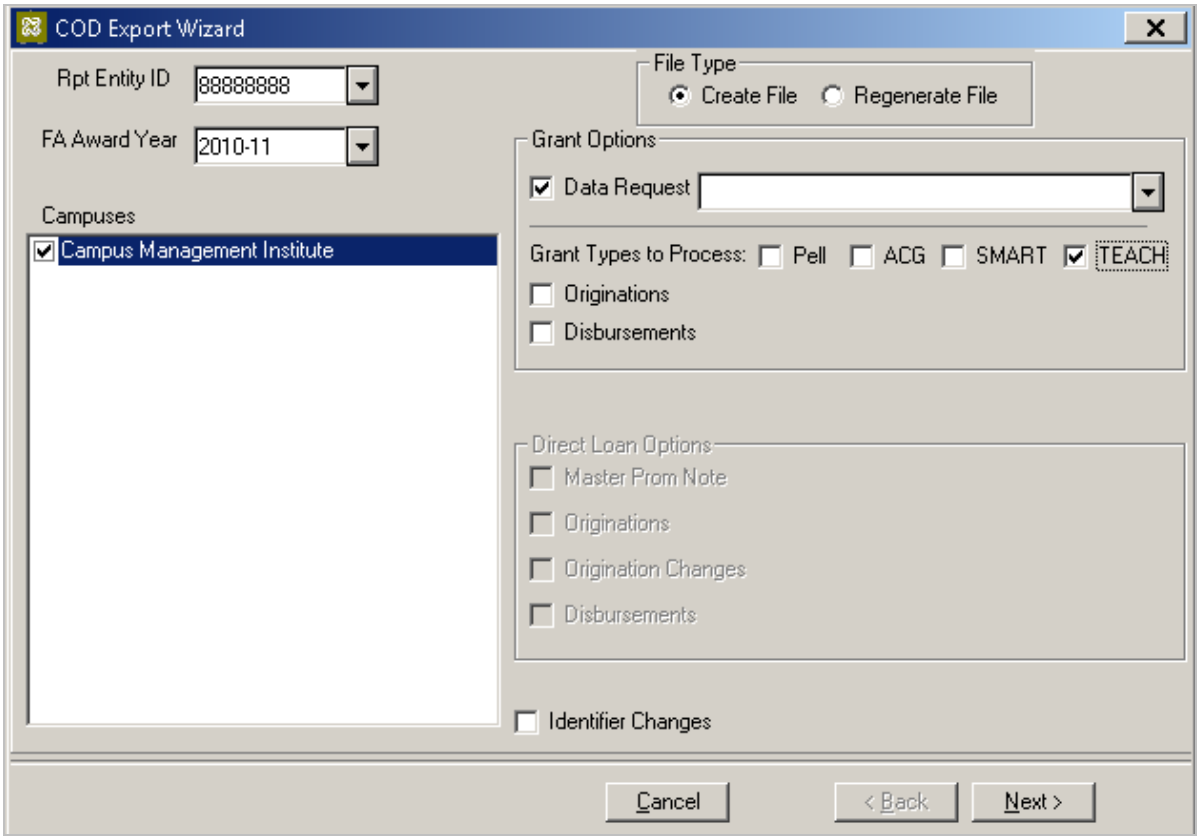
The **COD Export** of Pell verifies that the weeks defined for the program are within a valid range. For Clock Hour programs, the minimum value has been 30 weeks, or 26 weeks for award years 2006-07 and higher.

Note: When exporting Pell Originations to COD, CampusNexus Student validates if the Pell amount is greater than the 100% of the established Pell limit for those students marked as eligible for additional Pell funds (see Add'l Eligibility Indicator).

Data Requests and Import COD Reports for ACG, SMART, and TEACH grants can be processed, along with Pell. Refer to the 2010-2011 COD Technical Reference.

To export new files with combinations of Pell, ACG, SMART or TEACH Originations or Disbursements, or Direct Loan Options (Master Prom Note, Originations, Origination Changes, and Disbursement), and Identifier Changes:

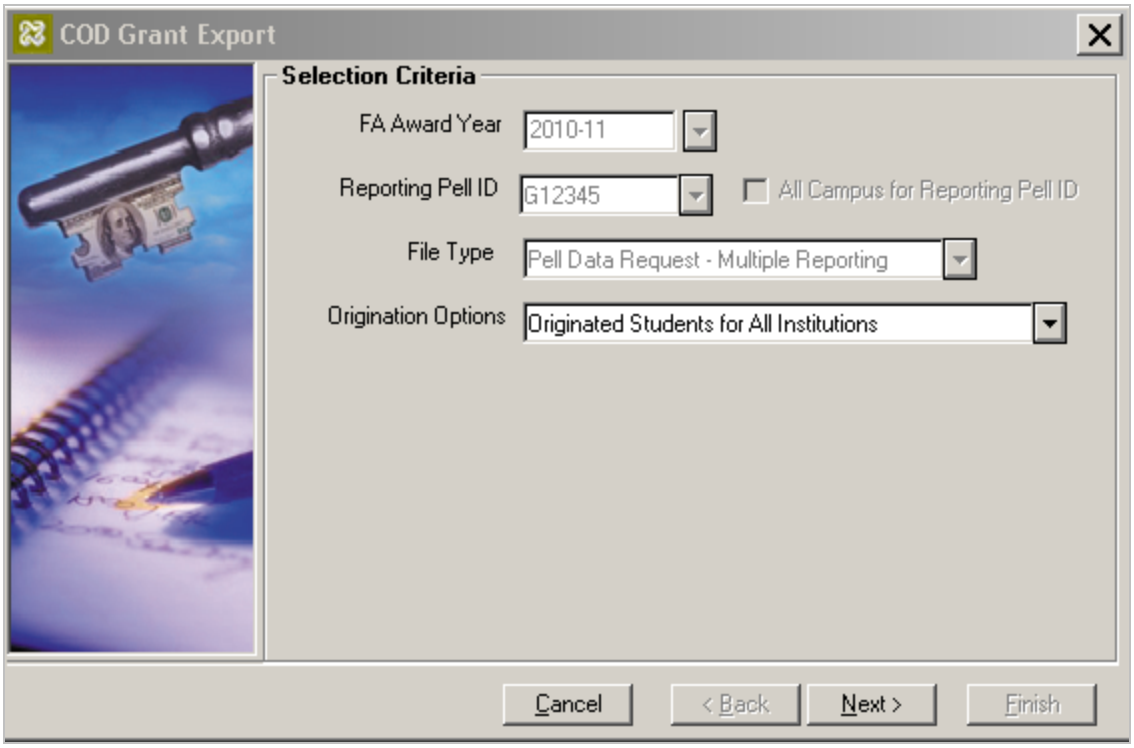
1. Navigate to **Daily** > **Financial Aid** > **Export Data > COD**. The COD Export Wizard is displayed.
2. The default response type selected for the **Rpt Entity ID** is chosen by the system, with an option for the user to override this choice. The **Full Response** type includes all the data elements that were sent by the school plus the rejected data elements and reason codes. The **Standard Response** Type only includes the rejected data elements and the reason codes.



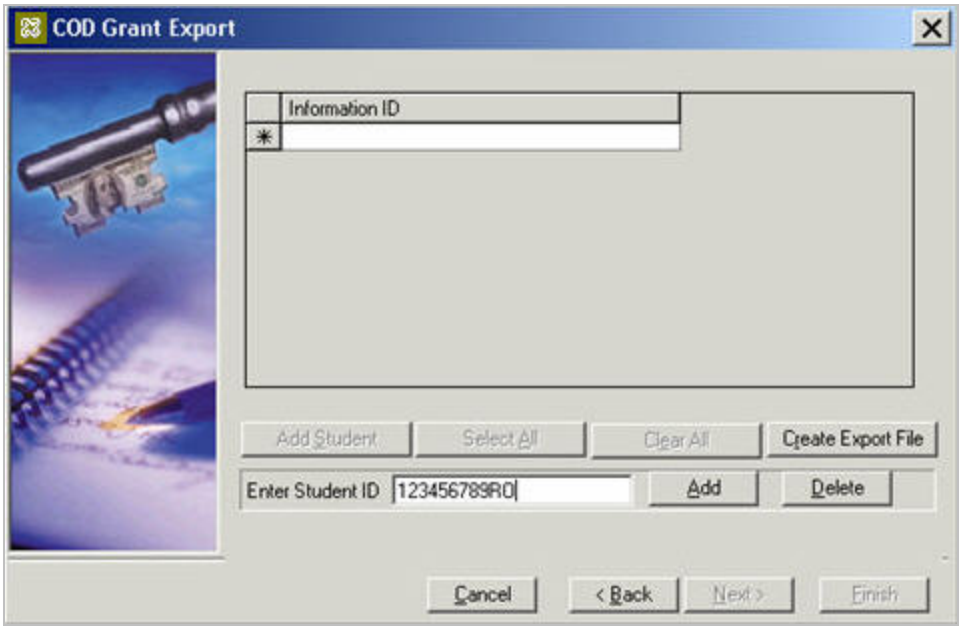
3. Select the desired **FA Award Year** and **Campuses** options.
4. Select **Create File** or **Regenerate File** from the **File Type** options.
5. Click **Create File** to create the **COD** file. A copy each in the **Campus** and System EDE Folders. Once the file has been successfully created, a report will be presented that will contain the extracted student's information.
6. The **Grant Options**, **Grant Types to Process**, and **Direct Loan Options** selections are mutually exclusive. Proceed to the Grant Options, Grant Types to Process, or Direct Loan Options sections below.

Grant Options

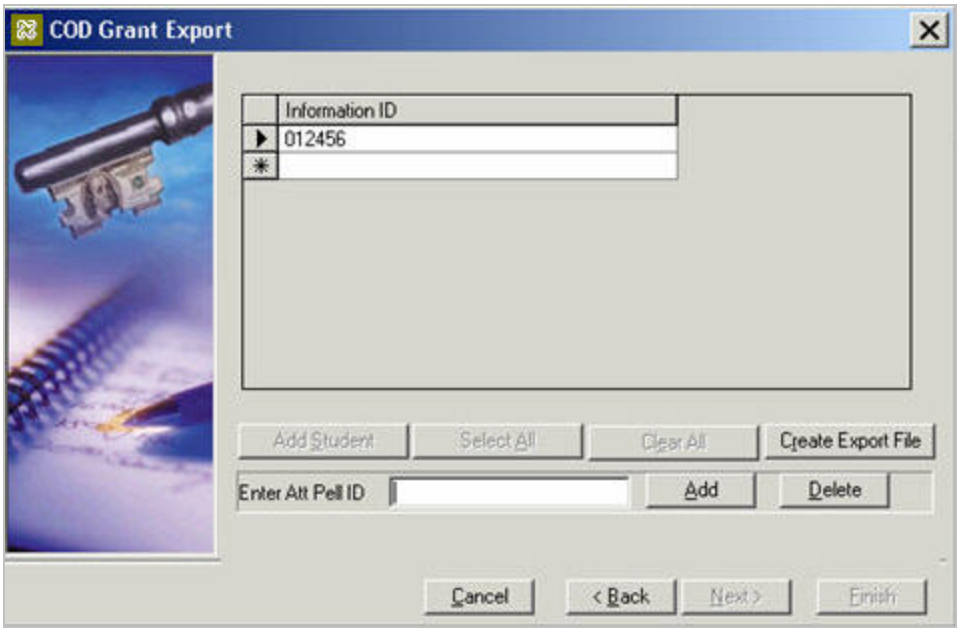
1. If **Data Request** is selected from the **Grant Options** section, select the applicable data request type for Pell, ACG, or SMART fund source. The options are *Multiple Reporting*, *Reconciliation Record*, *Statement of Account*, or *Year to Date* for each of the fund sources listed. Once you have made your **Data Request** selection for the applicable fund source, a message asks if you want to proceed with the selected data request. The **Identifier Changes** option is not available in conjunction with the **Grant Options**. Click **Yes** to continue or **No** to return to the form.
2. The **COD Grant Export** form is displayed next and contain only the fields that are needed to process the **Data Request** that you selected in the previous form. The illustration shows the fields needed for the *Pell Data Request - Multiple Reporting* selection. When the *Reconciliation Record, Statement of Account, or Year to Date* data request options are selected, this form does not present the **Origination Options** field. Click **Next >** to proceed.



3. If *Multiple Reporting* was selected with *Selected Originated Students* or *Selected Disbursed Students***Origination Options**, you can enter each student that had a multiple reporting request. If the **Enter Student ID** text box is *enabled*, enter the student's SSN and Name code (first two digits of the Last Name) for at least one student. Use the **Add** and **Delete** buttons to add or remove students.



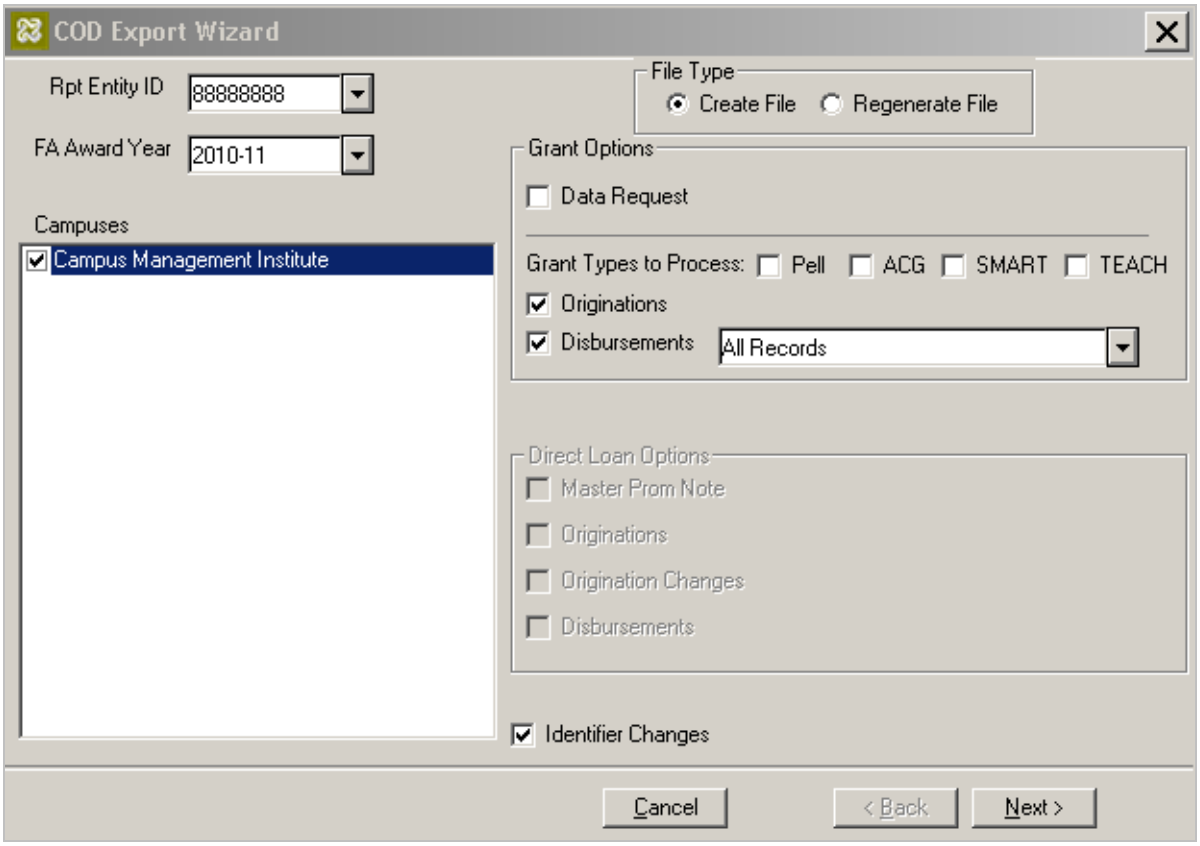
Note: If the *Originated Students for Selected Institutions* or *Disbursed Students for Selected Institutions***Origination Options** are selected, enter the institution code (s) for the multiple reporting record. In CampusNexus Student, this is the Attending Pell ID.



4. Click **Create Export File** to create the export file.
5. Click **OK** on the confirmation message.
6. Click **Finish** to return to the initial COD Export Wizard form.

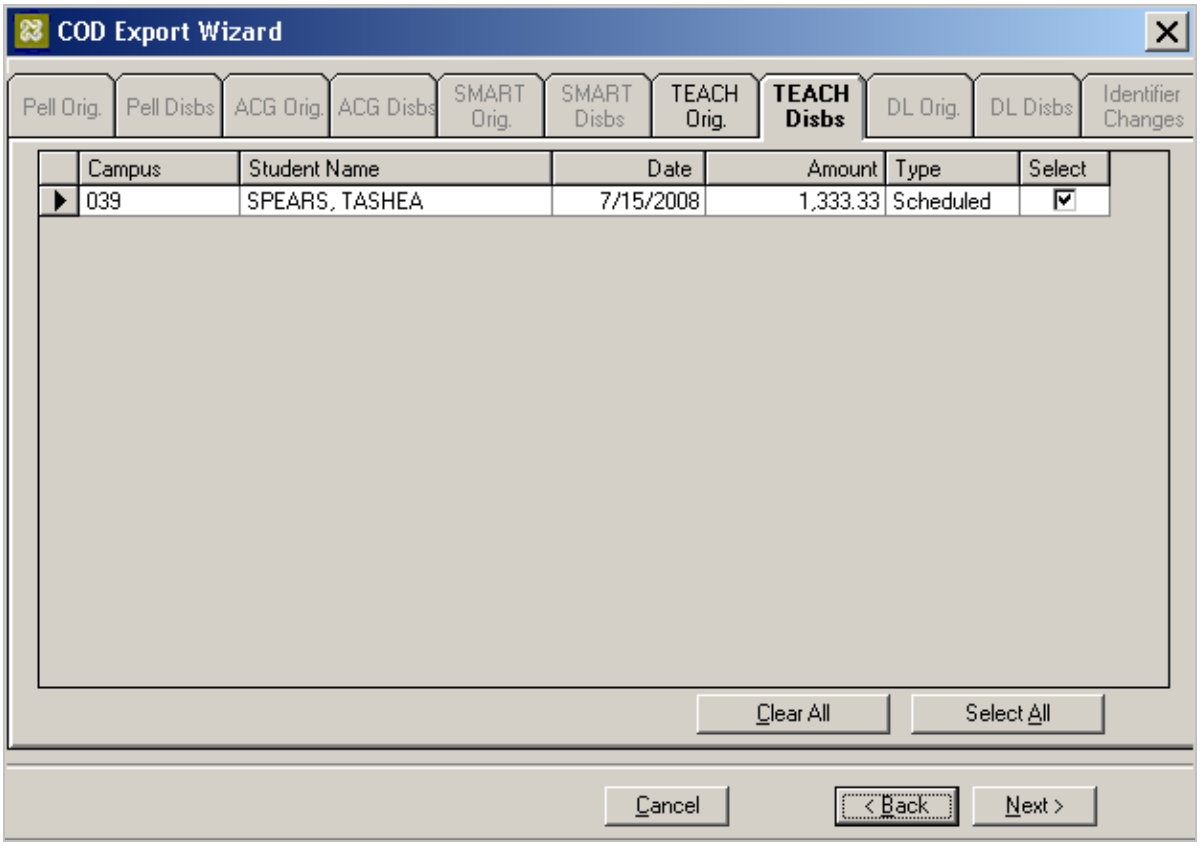
Grant Types to Process Option

1. The **Grant Types to Process** section offers **Originations** and **Disbursements** export options for **Pell**, **ACG**, **SMART**, and **TEACH** loans. **Identifier Changes** can also be selected. The fund sources can be exported all at once or separately, depending on your **Grant Types to Process** selection.



2. If the **Disbursements** option is selected, you can choose one of the following options: *All Records, Adjustments and Paid Disbursements, or Select by FA Disbursement Batch*. Once you have made your disbursement selection, an information message will appear letting you know which extract records will be gathered. Click **OK** to proceed.

3. The records for the selected **Grant Types to Process** options appear in the *enabled* tab(s). For example, if you opted to extract Pell origination, a list of students meeting the selection criteria for Pell is displayed in the **Pell Orig.** tab. The illustration demonstrates that **Pell**, **ACG**, **SMART** and/or **TEACH** grant(s) were selected for **Originations** and **Disbursements**, as well as **Identifier Changes**.

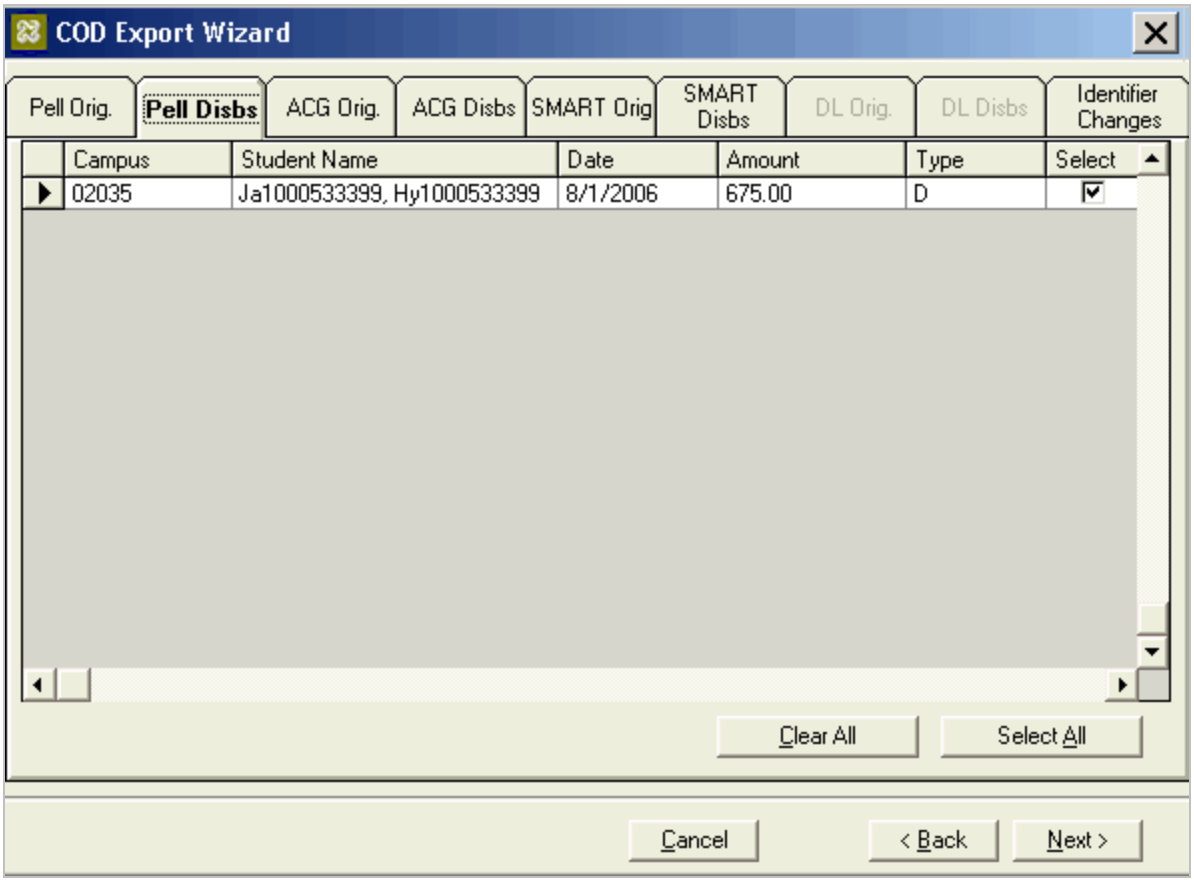


4. The **Validated** column in each row contains a **Yes** and a check mark is displayed in the **Select** check box for students with valid data to extract; otherwise, a **No** is displayed in the **Validated** column, and the check mark does not appear in the **Select** check box. If there are validation issues,CampusNexus Student displays them in the **Validation** comment box. You can select the **Validate** button, which will cause the system to display the student packaging award form. If all validation issues are solved for the student, CampusNexus Student places a **Yes** in the **Validation** column and a check mark in the **Select** check box for the student.

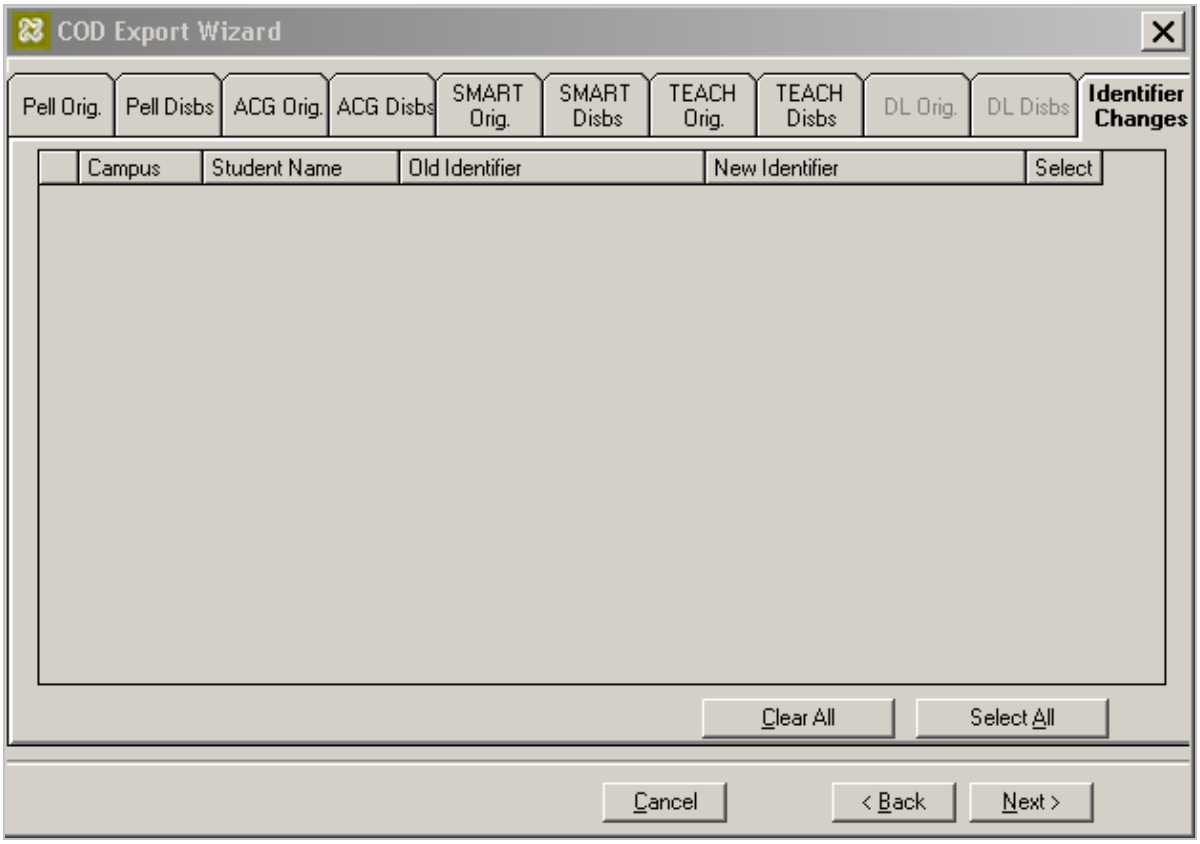
   Note: Only students with a check mark in the **Select** check box are exported.

5. You can use the **Clear All** button to exclude all records listed, **Select All** to include all records listed, or add students by clicking **Add Student**. If you select **Add Student**, you are prompted to enter the student's SSN number. CampusNexus Student adds the student and validate it if there is a student record that matches the SSN, Campus (es) selected and Award Year.

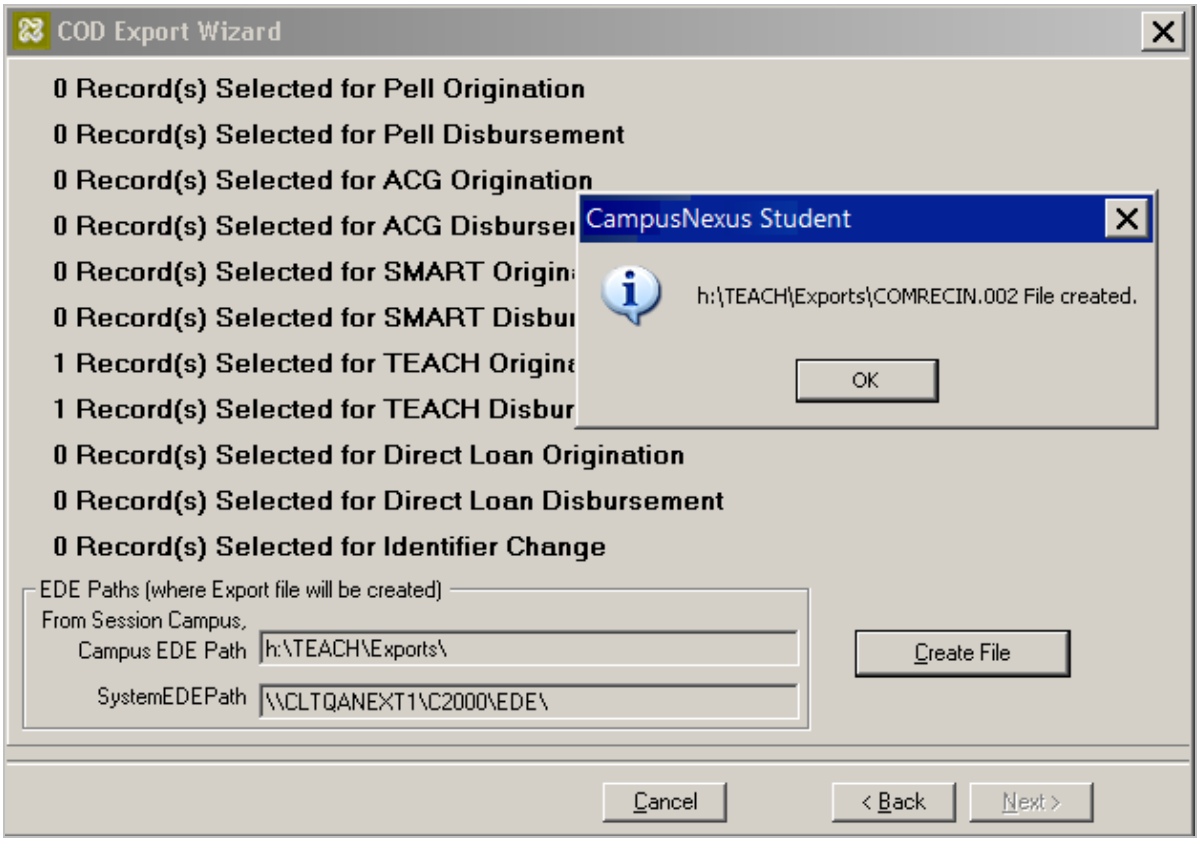
6. The **Pell Disbs** tab contains different fields for the Pell disbursements, but only the records that contain a check mark in the **Select** column will be exported.



7. The **Identifier Changes** tab contains the following fields, and also needs a check in the **Select** field.



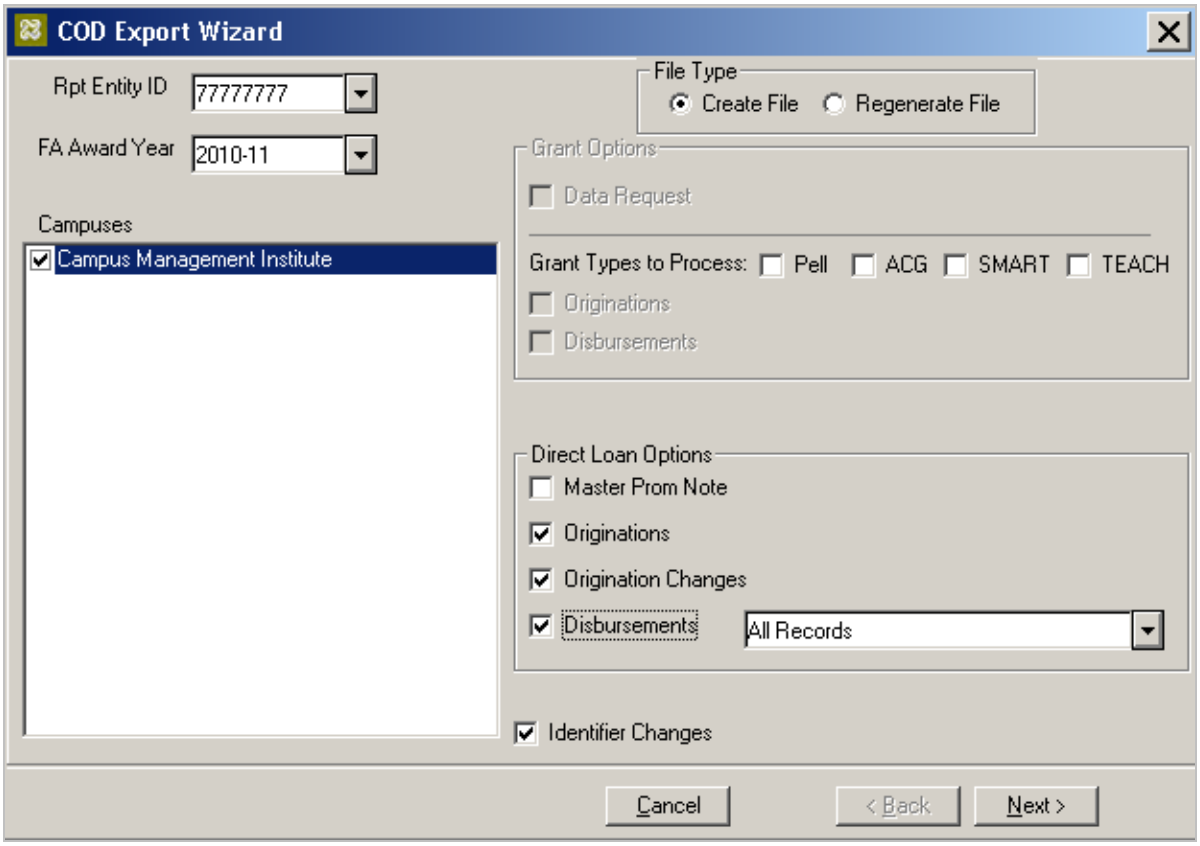
8. When **Next** is selected, a page is displayed listing information on the number of records of each loan category that have been selected for export. Select the **Create File** button. The system will present a confirmation message when an export file has been successfully created.



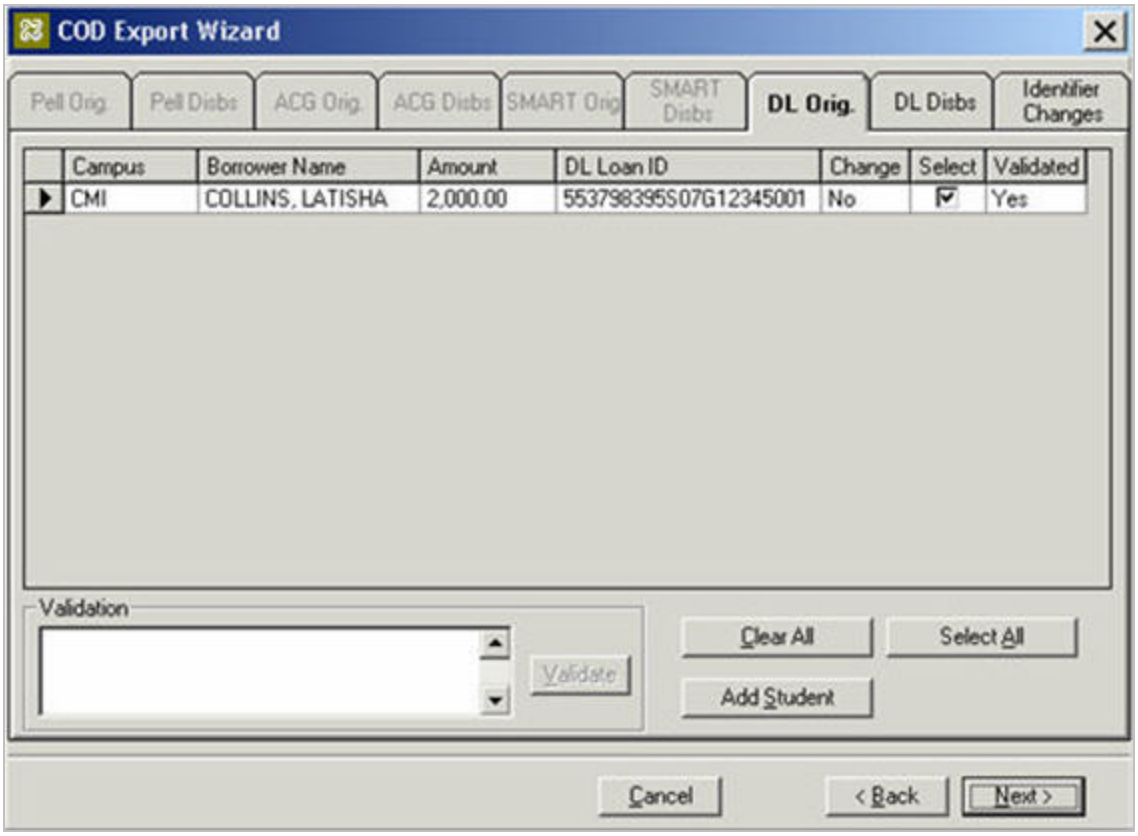
Direct Loan Options

1. If the **Rpt Entity ID** is for direct loans, then the system will enable the **Direct Loan Options** upon selecting the **Rpt Entity ID**.

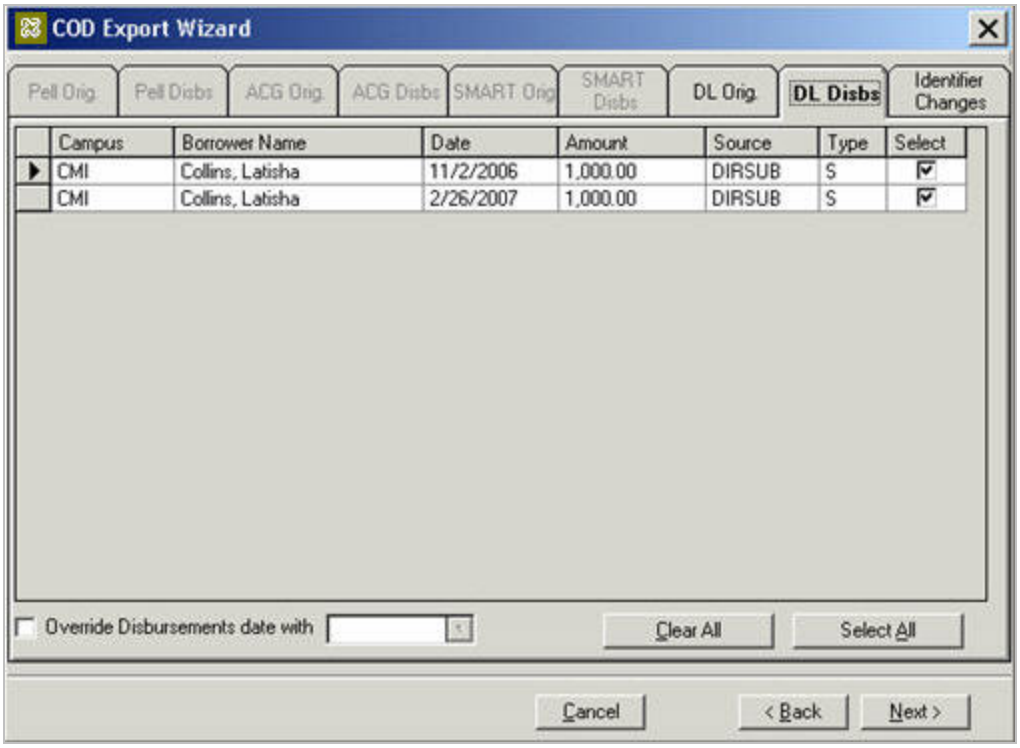
   Note: The Manual Dependency status/model, which allows a Direct PLUS loan to be awarded to a student's parent without requiring the student to complete a FAFSA or require the institution to have a valid ISIR on file for the student, can now be used for export of the Direct parent Plus loans to COD and for validation purposes.



2. Select one or more of the **Direct Loan Options**: Master Prom Note, Originations, Origination Changes, Disbursements, and Identifier Changes.
3. If you selected the **Master Prom Note** option, then proceed to the Master Prom Note instructions below.
4. If you selected **Originations**, **Origination Changes**, or **Disbursements,** and/or **Identifier Changes**, then click **Next >**. The **Disbursements** options are: *All Records, Adjustments, Date Changes and Paid Disb., or Select by FA Disbursement Batch*.
5. The applicable **Direct Loan** and/or **Identifier Changes** COD export tab(s) will be enabled. The user selected originations, origination changes, disbursements and identifier changes in this example.



6. You can use the **Clear All** button to exclude all the records listed, **Select All** to include all the records listed, or add students by clicking **Add Student**. If you select **Add Student**, you are prompted to enter the student's SSN number. CampusNexus Student then adds the student and validate if there is a student record that matches the SSN, Campus(es) selected, and Award Year.
7. The **DL Disbs** tab contains fields for the **Direct Loan** disbursements, but only the records with the **Select** check box selected are exported.

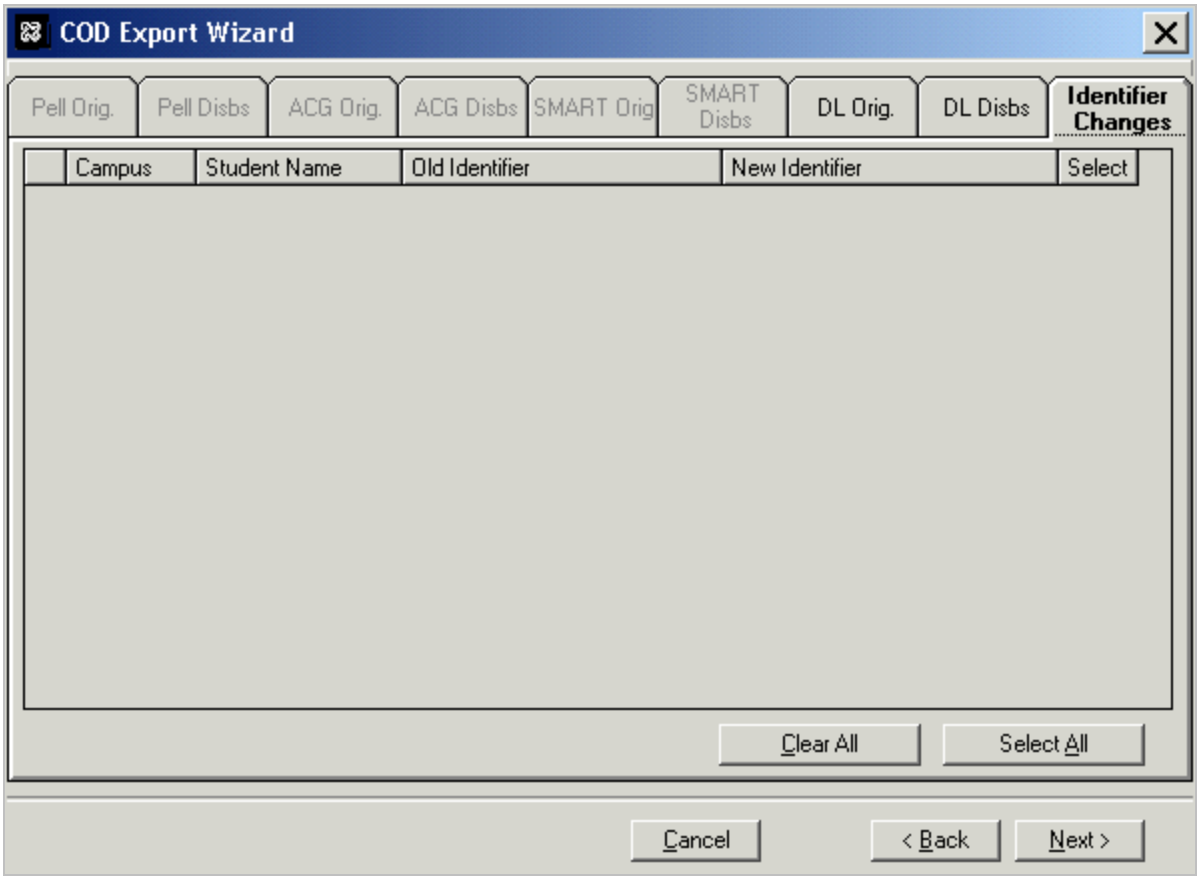


8. Optional: Select the **Override Disbursements date with** check box and select a date from the drop-down list.

   Note: If this option is selected, the Scheduled Disbursement tab in View > Financial Aid > Awards displays the updated disbursement date in a column labeled **Override Disb. Date**. See Scheduled Disbursements tab.

9. Select **Next** to proceed, **Back** to return to the previous form, or **Cancel** to disregard changes.

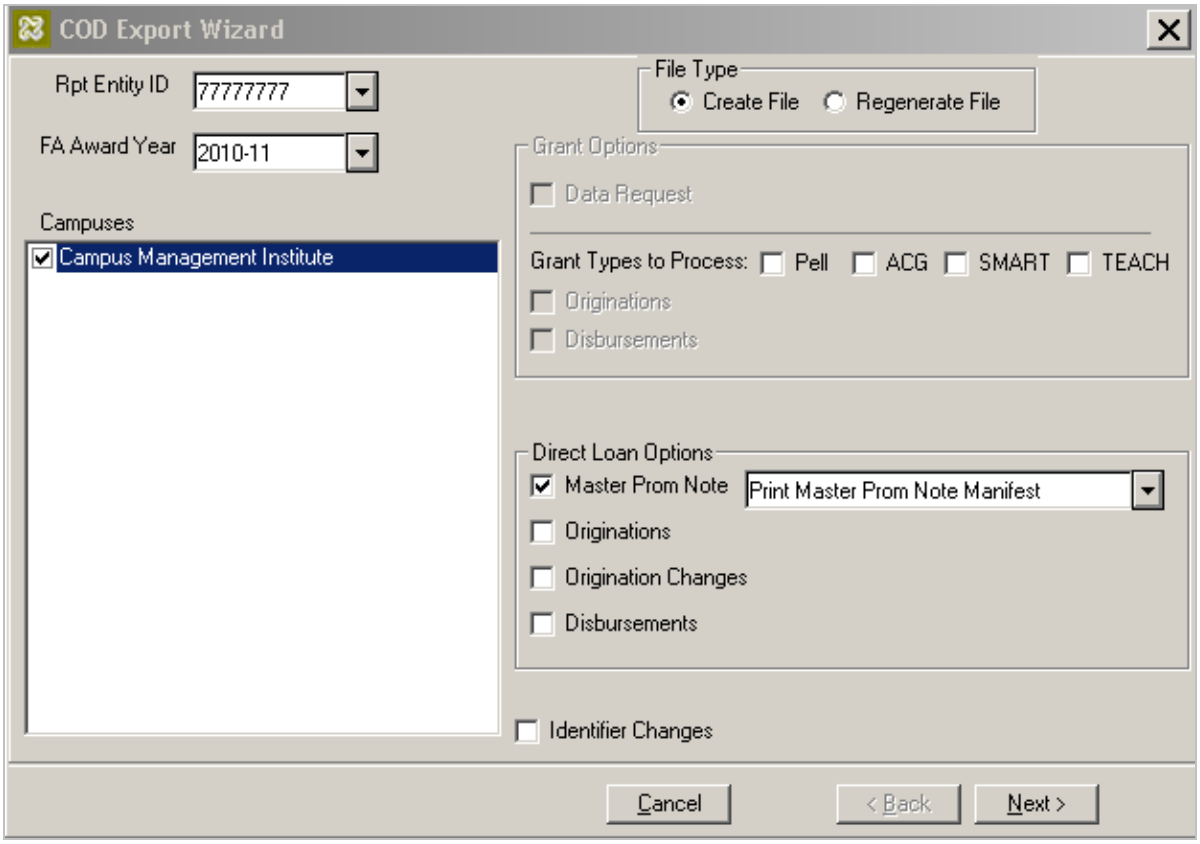
10. The **Identifier Changes** tab contains the following fields, and also need a check in the **Select** field to be exported.



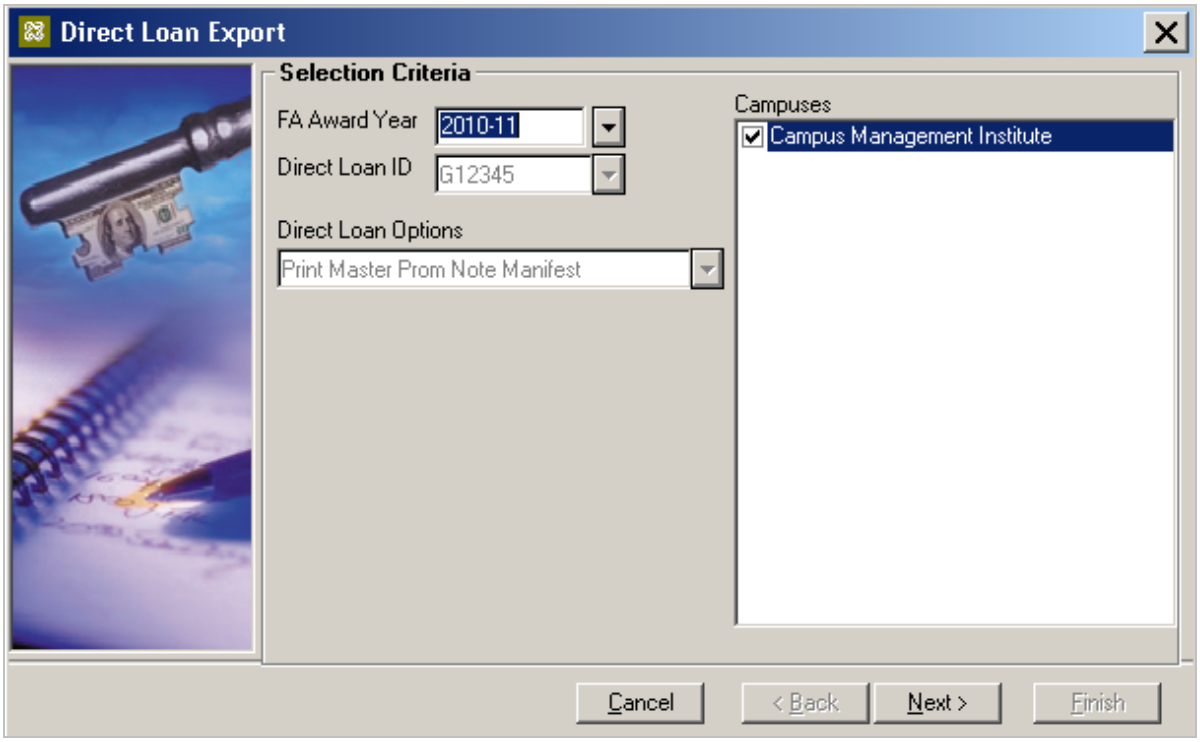
11. CampusNexus Student displays a message containing the number of originations and disbursements that can be exported, along with a **Create File** button, and the EDE paths for the campus and system. Click **Create File.** A confirmation message is displayed.

Master Prom Note

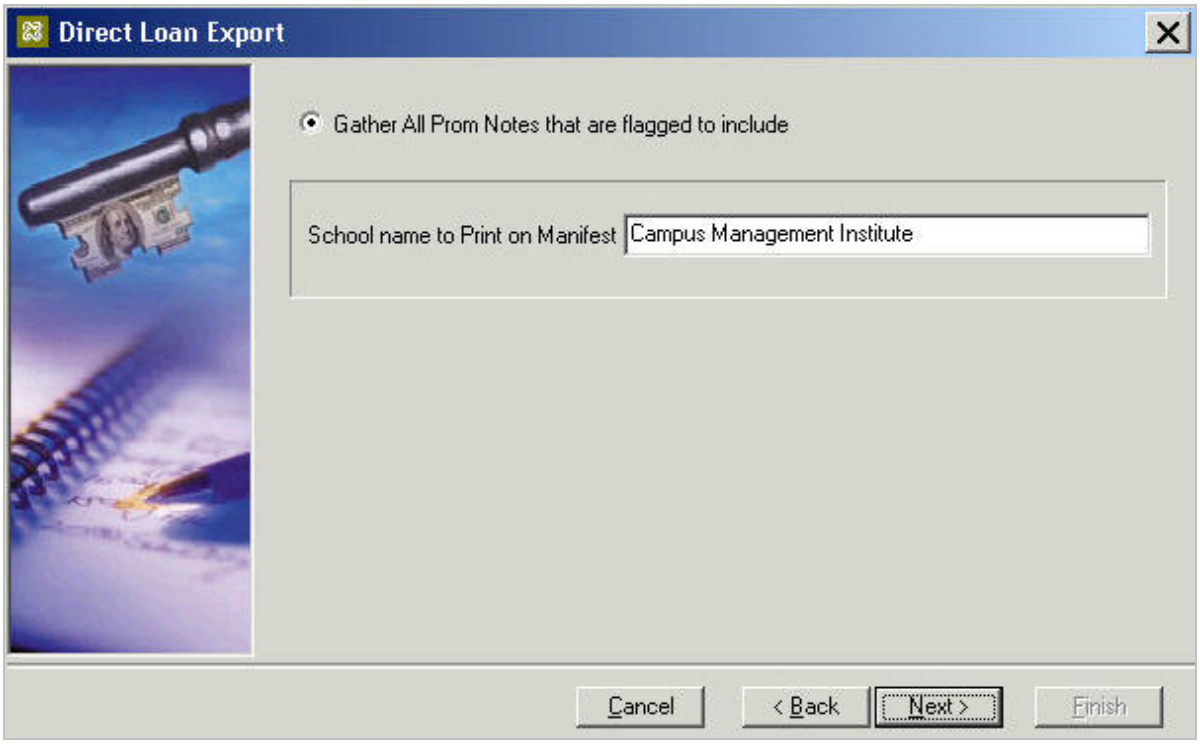
1. If you chose Master Prom Note, select the **Print Master Prom Note Manifest** or **Print PLUS Master Prom Note Manifest** option. You can alter the **FA Award Year** and **Campuses** selections before proceeding. Click **Next >** to proceed.



2. A message asks if you want to proceed with your selection. Click **Yes** to continue or **No** to return to the previous form.
3. The **Direct Loan Export** form is displayed.

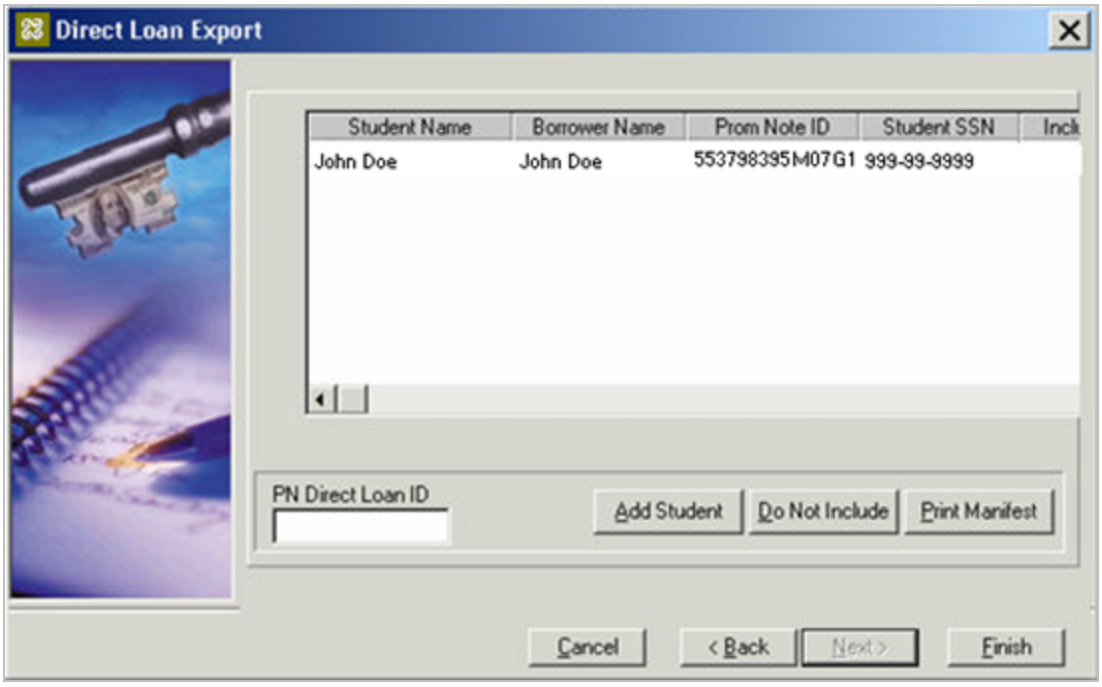


4. Click **Next** to proceed.

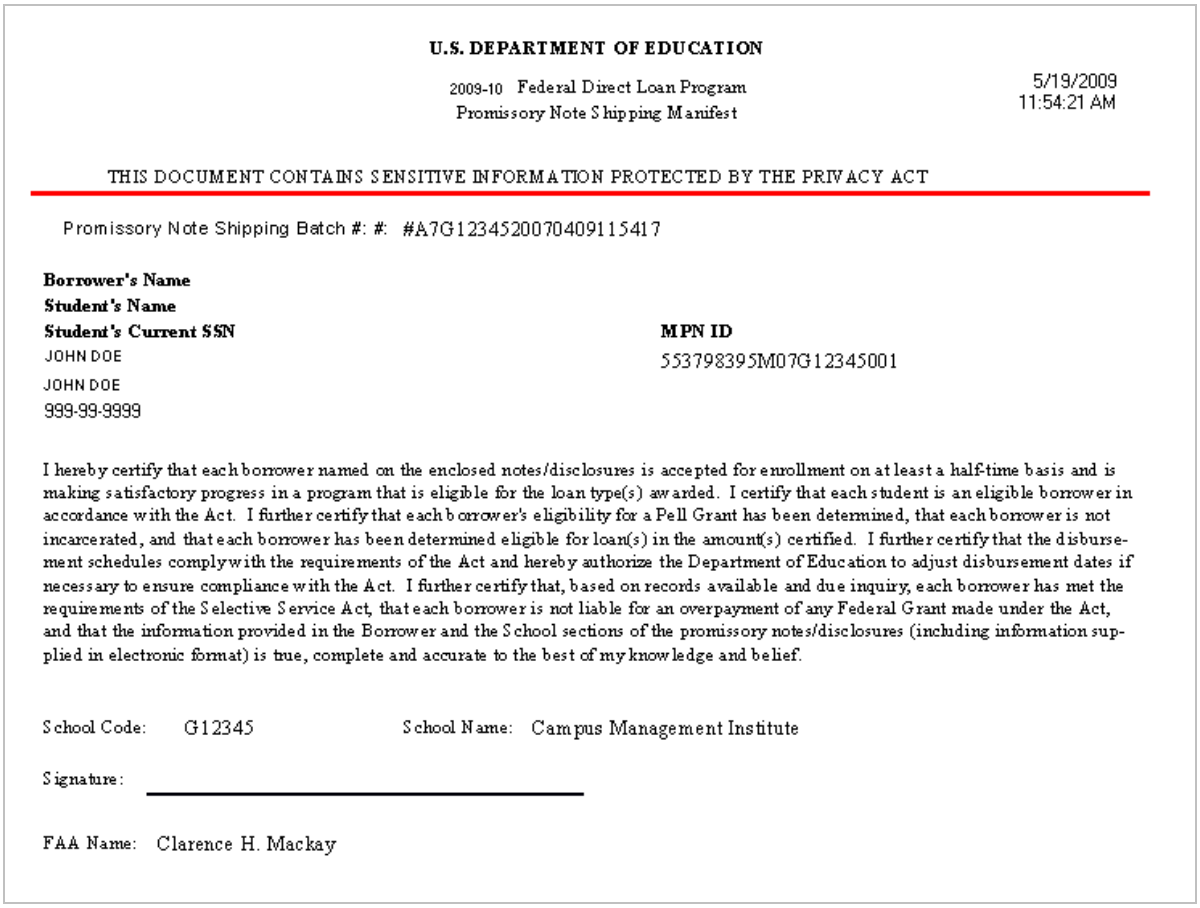


5. If there are loans selected in the Manifest, they will appear in the next form; otherwise, a message will appear stating that there are no loans in the Manifest and you will be returned to the previous form. Use the **Add Student** button to add students to the Manifest, **Do Not Include** button to remove students from the Manifest, and **Print**

Manifest button to print the manifest. Click **Next >** when you are ready to export.



6. Click **Print Manifest** to view the Manifest.



U.S. DEPARTMENT OF EDUCATION

2009-10 Federal Direct Loan Program
Promissory Note Shipping Manifest

5/19/2009
11:54:21 AM

THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT

Promissory Note Shipping Batch #: #: #A7G1234520070409115417

Borrower's Name
Student's Name
Student's Current SSN
JOHN DOE
JOHN DOE
999-99-9999

MPN ID
553798395M07G12345001

I hereby certify that each borrower named on the enclosed notes/disclosures is accepted for enrollment on at least a half-time basis and is making satisfactory progress in a program that is eligible for the loan type(s) awarded. I certify that each student is an eligible borrower in accordance with the Act. I further certify that each borrower's eligibility for a Pell Grant has been determined, that each borrower is not incarcerated, and that each borrower has been determined eligible for loan(s) in the amount(s) certified. I further certify that the disbursement schedules comply with the requirements of the Act and hereby authorize the Department of Education to adjust disbursement dates if necessary to ensure compliance with the Act. I further certify that, based on records available and due inquiry, each borrower has met the requirements of the Selective Service Act, that each borrower is not liable for an overpayment of any Federal Grant made under the Act, and that the information provided in the Borrower and the School sections of the promissory notes/disclosures (including information supplied in electronic format) is true, complete and accurate to the best of my knowledge and belief.

School Code: G12345 School Name: Campus Management Institute

Signature: _____

FAA Name: Clarence H. Mackay

7. Click **Finish**.

Import Application Data

Note: Please access Regulatory Help for the latest content about FAFSA, ISIR, and COD processing.

Use this option to import Institutional Student Information Records (ISIRs) Error Reports and Signature Hold Files into the CampusNexus Student database. ISIR records are created as the result of FAFSA processing at the Central Processing System (CPS). Ordinarily, your school sends in new electronic FAFSAs or renewal FAFSAs for each student for each award year. When the CPS edits the FAFSAs, it accepts or rejects the data based on its editing criteria. When the FAFSAs pass the edit checks, an Expected Family Contribution is calculated and an ISIR record is created. Usually, you will send batches of FAFSAs to the CPS. CPS, in turn will send matching batches of ISIRs back to your school. If some of the FAFSAs do not pass the edit checks, the corresponding ISIR records will contain reject codes. The rejected data must be corrected and resubmitted to the CPS.

Beginning in FA Award Year 2005-06, schools can import multiple ISIRs as well as individual ISIRs. The process is slightly different. For import details, please refer to Import Application Data#Importing_ISIR_files_*prior*_to_FA_Award_Year_2005-06 or Import Application Data#Importing_ISIR_files_*for*_2005-06_and_later, as applicable.

Sometimes, there are more ISIRs returned than there were FAFSAs sent. A student may send in a paper FAFSA or an on-line FAFSA from the Internet with your school designated as an ISIR recipient. More than one school may receive copies of the same ISIR. In this case, CampusNexus Student can be set up to create new lead records for students whose FAFSAs are not already in your database.

CampusNexus Student verifies that the origination ID on the COD origination Record equals the transaction ID on the ISIR. This prevents issues where name changes result in the origination ID being different from the ISIR transaction ID due to the timing of the ISIR being sent, the name being changed in the database, and the Pell record being scheduled. Once an ISIR Transaction ID is assigned to a student by the issuing of an ISIR from the Department of Education, the student must be identified by this ID for the rest of the year. Therefore, the origination ID must equal the ISIR transaction ID in cases where spelling errors, typos, or name changes are relevant. Additionally, users still need to make corrections to an ISIR through the ISIR corrections option and to the student master when necessary.

The file types you can import with this option are ISIRs and Error Report Files. An error file is sent from the CPS to inform the school of any processing errors that took place for any application files submitted by the school. An error file may inform the school that an entire batch was rejected or any detail records that were rejected. If you import an error report file, CampusNexus Student will provide a report to list the contents of the file.

In conjunction with the Automatic Document Scheduler feature, document schedules based on "Pre-Enrollment" or "Enrollment" will be evaluated when ISIRs are imported. If the student's data matches the specified criteria for a document schedule where the criteria includes at least one of the ISIR data items (Comment Codes, SAR C flag, or Dependency Status), all documents attached to the document schedule that are not already scheduled will be scheduled for the student.

The program updates the Origination status to R when importing an ISIR where the ISIR Transaction ID is greater than the ISIR Transaction ID on file in the student's RFMS record, or the EFC is different than the EFC on File, AND the origination record is currently in an "E" (rejected) status. This occurs only when the Use COD flag is set to YES in Setup > Financial Aid > Pell.

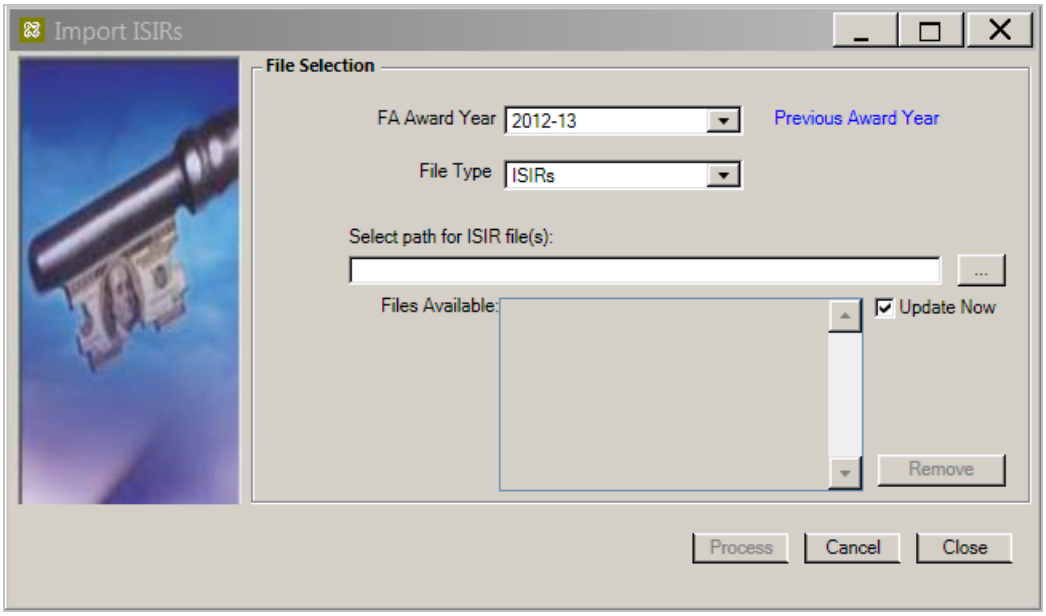
If a batch-level error report is being imported, an update will occur to the FA Batch Export Import table reflecting that the batch was rejected. If a record-level error report is being imported, each record in the file will update the CPS Status in the student FAFSA table reflecting that the FAFSA was rejected.

Beginning with the 2005-06 award year, ISIR files can be imported in batches. A new form is available when you select **FA Award Year 2005-06** or later.

When importing ISIRs, CampusNexus Student determines if the student's grade level is '1st year never attended college', and updates the student's Academic Year sequence 1 to indicate that the student is a 'First Time Borrower'.

To import ISIR files for FA Award Years 2012-13:

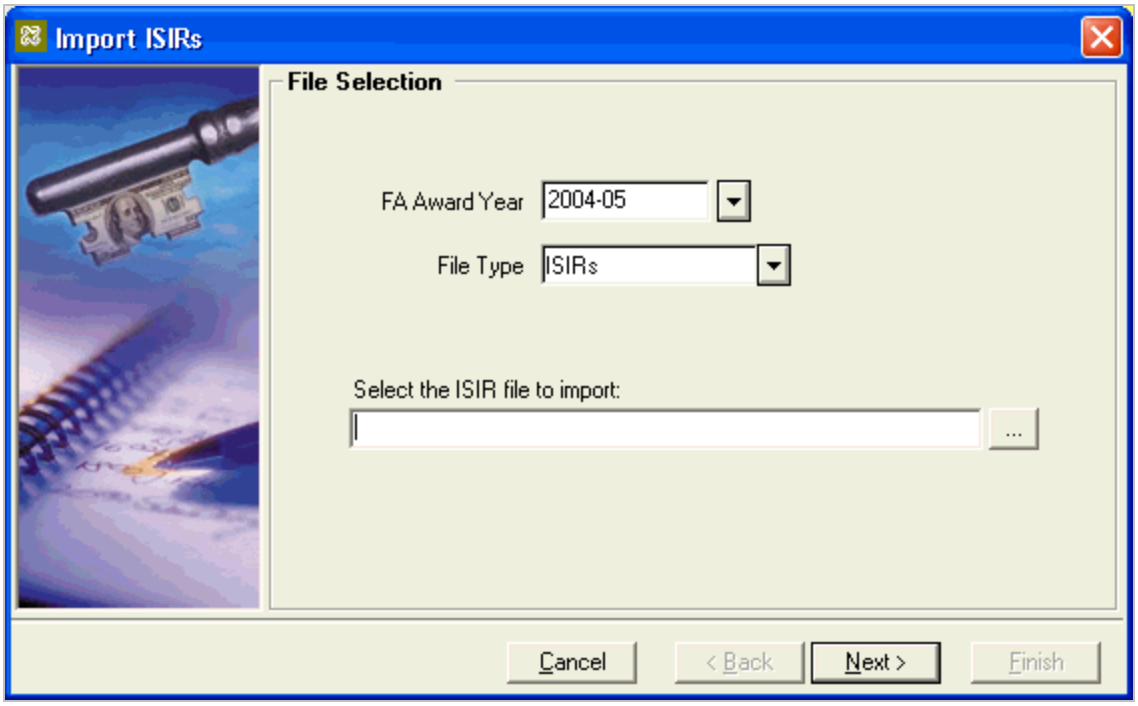
1. Navigate to **Daily** > **Financial Aid** > **Import Data** > **Application Data**. The Import ISIRs wizard is displayed.
2. To select a previous award year, click **Previous Award Year**.



3. Select the **File Type**. File types include **ISIRs** and **Error Report File**.
4. Select path for the ISIR file(s) by clicking ... and browsing to the location at which the file resides. A list of files populates the Files Available text box.
5. Select the file you want. The file name to look for is **EAPS##OP.nnn** where ## is the award year and nnn is a sequential number.
6. Click **Process**. The file is processed accordingly.

To import ISIR files for FA Award Years prior to 2005-06:

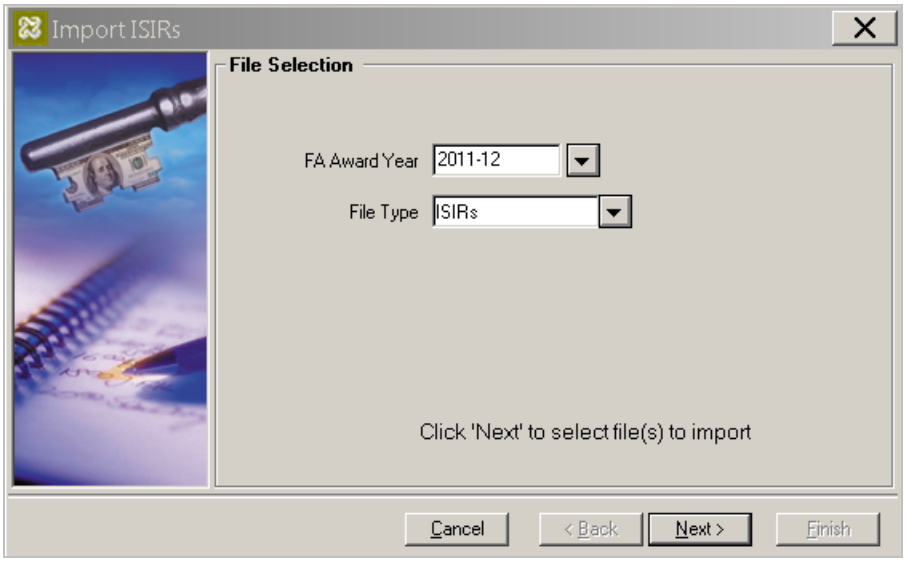
1. Navigate to **Daily** > **Financial Aid** > **Import Data** > **Application Data**. The Import ISIRs wizard is displayed.
2. Click **Previous Award Year**. The Import ISIRs dialog box is displayed.



3. Select the **FA Award Year** to be processed.
4. Select the **File Type**. File types include **ISIRs** and **Error Report File**.
5. Select the **ISIR file to import**. The file name to look for is **EAPS##OP.nnn**, where ## is the award year and nnn is a sequential number.
6. Click **Next**. If you have selected a file that has already been imported, you will get a warning message so indicating and a **Yes**/**No** prompt to overwrite the existing batch.
7. Click **Yes** or **No** as required. CampusNexus Student displays the list of students included in the ISIR batch file.
8. Click **Finish** to complete the import procedure. A confirmation message is displayed. Click **OK**.
9. CampusNexus Student responds with another message indicating that the ISIR report is printed. The report is displayed by the report previewer. This may take a few seconds. When you see the preview on your screen, click **Print**.
10. Click **OK** again to acknowledge the "report printed" message. CampusNexus Student closes the Import ISIR File wizard. A sample portion of one page of the ISIR report is shown at the bottom of this page.

To import ISIR files for FA Award Year 2005-06 and later:

1. Navigate to **Daily** > **Financial Aid** > **Import Data** > **Application Data**. The Import ISIRs wizard is displayed.
2. Click **Previous Award Year**. The Import ISIRs dialog box is displayed.



3. Select the **FA Award Year** to be processed. The year must be later than 2005-06.
4. Select the **File Type**. File types include ISIRs and Error Report File.
5. Select the **ISIR file to import**. The file name to look for is **EAPS##OP.nnn**, where ## is the award year and nnn is a sequential number.
6. Click **Next**. If you have selected a file that has already been imported, you will get a warning message so indicating. Otherwise, the **2005-06** (or other FA Award year) form is displayed. This form displays the path selected for ISIRs, if one has already been set. If not, click the **Search** tool to the right of the Select Path field to choose a drive and folders into which the system shall import the files.
7. All files available in the chosen folder are displayed in the Files Available field. Select a file and click **Remove** to prevent the system from importing a particular file. If you remove these files from the current batch, they are displayed the next time this form is opened.
8. Select **Update Now** to process the selected files immediately. If this box is not selected, the default setting, processing will occur during school-defined off hours, typically at night.

   WARNING! We recommend that you do not click **Update Now** unless you need to work with the student(s) today, or you are updating at the end of your shift. **Update Now** will tie up your workstation for the duration of processing.
9. Click **Process** to begin processing. Click **Print** to generate an ISIR Import report. Processing and printing functionality is the same as in previous in previous years.
10. Use the procedure described above to import the **Error Report File**. The file name to look for is **FDRE##OP.nnn**, where ## is the award year and *nnn* is a sequential number.

Note: If the 'Round all Disbursements to whole dollars' check box on the Fund Source Configuration form is cleared and the registry key to allow Pell Cents is enabled, then the exact amount of cents is displayed and saved for the Pell origination amount. The Pell origination amount is processed and saved with the properly calculated amount of cents in regards to Year-Round Pell Additional Eligibility Indicator.

To import Signature Hold Files:

Note: The Department of Education will discontinue Signature Hold Files beginning with the 2005-06 FA Award Year. Functionality will be the same for previous years.

1. Navigate to **Daily** > **Financial Aid** > **Import Data** > **Application Data**. The Import ISIR File wizard is displayed.
2. Click **Previous Award Year**. The Import ISIRs Previous Award Year dialog box is displayed.
3. For **FA Award Year**, select a year before 2005-06.
4. Select **Signature Hold File** File Type.
5. Select the **ISIR file to import**. The file name to look for is HOLD*nn*OP.
6. Click **Next** to show a detail report and a form with the list of students
7. Click **Finish** to complete the operation.

COD Import (2010-11 and prior award years)

This form is used to provide information required by the Common Origination and Disbursement (COD) program **for award years (AY) 2010-11 and earlier**.

Note: For information on changes made for Full Participants for the current year, including new edit codes, warning codes, and information about the legacy Pell and Direct Loan system, please refer to the FSA Technical Reference.

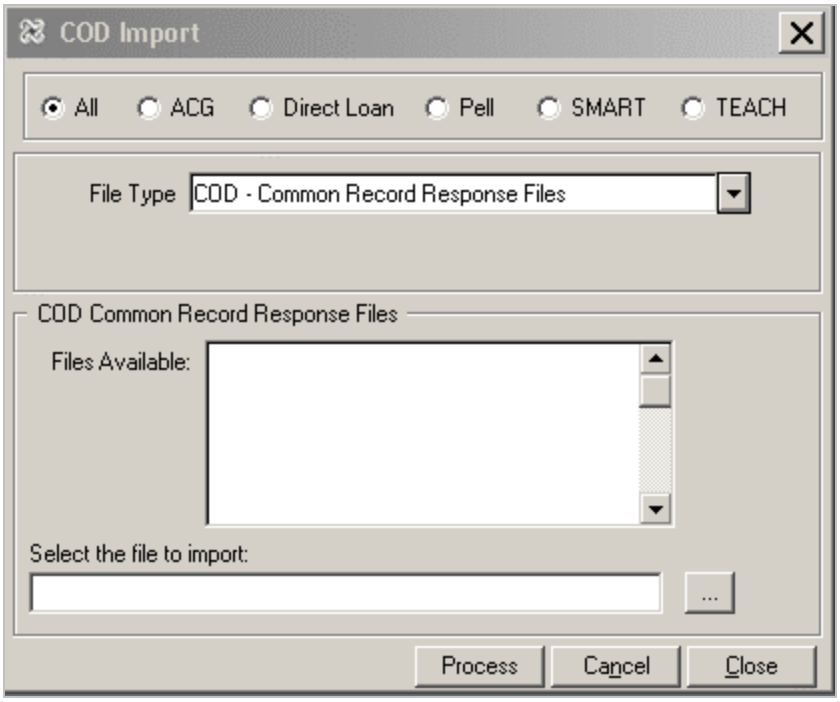
A Full Participant school can originate a loan, make changes to a loan, create disbursements, or change disbursements directly on the COD website. These actions on the COD website will generate a **Web Response** file that is sent to the school which can be imported.

Note: If the loan is not found, the disbursement information will not be added or updated.

CampusNexus Student will support and update the **Master Promissory Noteexpiration** data for **Direct Loan** awards, validate new message classes for 2008-09.

To import COD files:

1. Navigate to **Daily** > **Financial Aid** > **Import Data > COD**. The COD Import form is displayed.



2. Selecting **All** will allow you to select all files regardless of Award Type.
3. When the **Direct Loan** option is selected, you can select a Direct Loan **File Type**, or import **COD Common Record Response Files**.

   The Direct Loan import options are:

   - School Account Statement (SAS)
   - COD Generated Reports
   - YTD Rebuild
   - DL Entrance Counseling Results
   - DL Entrance Counseling Acknowledgement
   - MPN Discharge Report

- Expired MPN Report
- MPNs Due to Expire Report.

4. When the **Pell** option is selected, you can select a **Pell** file import, or import **COD Common Record Response Files**.

   The Pell import options are:

   - Electronic Statement of Account
   - Data Request Acknowledgement
   - Multiple Reporting Records
   - Year to Date Records
   - Reconciliation File Report
   - SSN/Name/DOB Change (ACG and SMART are included in this report)
   - POP/Pell Verification Status Report
   - Pending Disbursement List
   - Funded Disbursement List

   Note: When the Pell Award Year is 2009-10 or greater, the file type '**Funded Disbursement List**' will no longer be displayed as a Pell **File Type** option.

5. When the **ACG or SMART** option is selected, you can select an **ACG/SMART** file import, or import **COD Common Record Response Files**.

   The ACG and SMART import options are:

   - Electronic Statement of Account
   - Data Request Acknowledgement
   - Multiple Reporting Records
   - Year to Date Records
   - Reconciliation File Report
   - Pending Disbursement List

6. When the **TEACH** option is selected, you can select a TEACH file import, or import **COD Common Record Response Files**. The TEACH import options are:

   - ATS Note Acknowledgement - Award Year Specific
   - Multiple Reporting Records, School Account Statement
   - Pending Disbursement List
   - Inactive Grants Report
   - SSN/Name/DOB Change Report

7. You can select a **Receipt** file or **Response** file to import. In the list box titled **Files Available**, the system displays files named COMRECOP from the current directory. The system will only be able to import a response file one time, and import of a receipt file can be done multiple times. For the chosen file, the reporting entity ID in the file must match one that corresponds to a Campus for which you have access.

8. The system searches the database and updates loans or disbursements as necessary. When the process is completed a message is displayed indicating that the file has been imported.

   Note: COD edit codes associated with this import are described in this report.

9. Upon completion, reports are available to summarize results.

10. The **COD Import Notification** report summarizes the records that were imported.

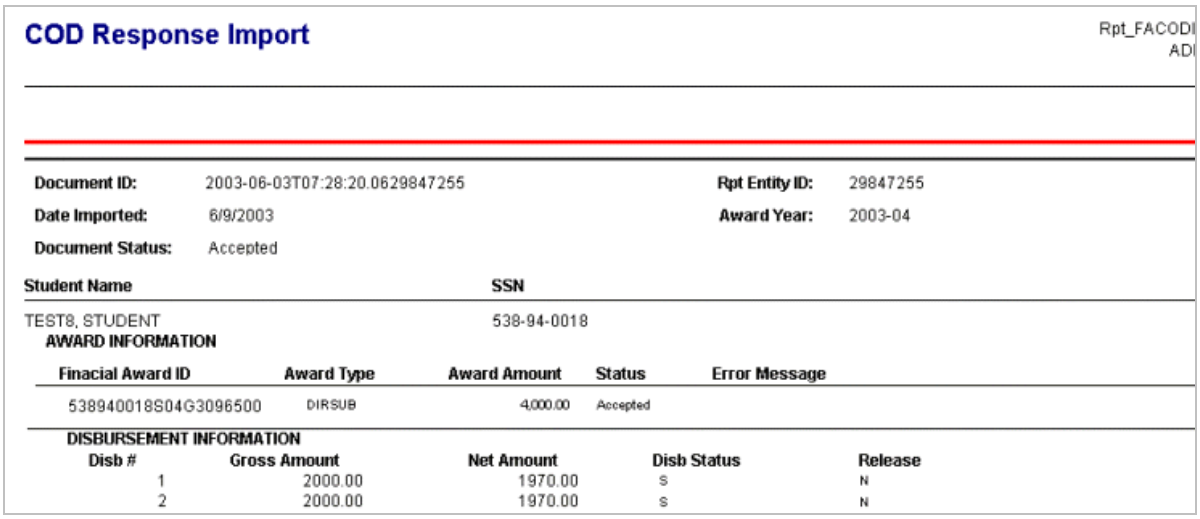
11. The **COD Import Reject** report summarizes the records that were not imported. If the system determines that

there is no student corresponding to the information in the document, the student information is presented on the COD Import Reject report labeled "No Student Found". If the system determines that there is no existing loan corresponding to the information for the student contained in the document, the loan and disbursement information is presented on the COD Import Reject report labeled: "No Loan Found for Student."

Three reports to help manage Master Promissory Notes are available:

- MPN Discharge Report
- Expired MPN Report
- MPNs Due to Expire Report

12. Run the COD Response Import report by navigating to **Reports > Financial Aid > COD Response Import** report. This report displays information on the import of response files like the one shown below.



COD Response Import

Rpt_FACODI
ADI

Document ID:	2003-06-03T07:28:20.0629847255	**Rpt Entity ID:**	29847255
Date Imported:	6/9/2003	**Award Year:**	2003-04
Document Status:	Accepted		

Student Name	**SSN**
TEST8, STUDENT	538-94-0018

AWARD INFORMATION

Finacial Award ID	Award Type	Award Amount	Status	Error Message
538940018S04G3096500	DIRSUB	4,000.00	Accepted	

DISBURSEMENT INFORMATION

Disb #	Gross Amount	Net Amount	Disb Status	Release
1	2000.00	1970.00	S	N
2	2000.00	1970.00	S	N

Import Direct Loan

The U.S. Department of Education's (ED) Common Origination and Disbursement (COD) System sends several direct-loan-related file types to your institution in response to files you export. Use this form to import these file types into CampusNexus Student. The files typically reside in the directory on your system that is shared with your EDconnect software. EDconnect is used to receive the files from ED. The default directory must be configured.

Direct Loans are processed through the COD Import wizard.

The file types that you can import using this form include ("yy" in the file name represents the award year):

- Common Record Response Files (COMRECOP, CRAAyyOP, CRDLMYOP, CRDLyyOP)
- School Account Statement (DSDFyyOP)
- COD Generated Reports
- YTD Rebuild (DLRBLDOP)
- DL Entrance Counseling Results (DECFENOP)
- DL Entrance Counseling Acknowledgement (CRECMYOP)
- MPN Discharge Report (MPNDISOP)
- Expired MPN Report (MPNINAOP)
- MPNs Due to Expire Report (MPNEXPOP)

The procedure for importing all file types is similar; the description below is a typical example.

To import Direct Loan files:

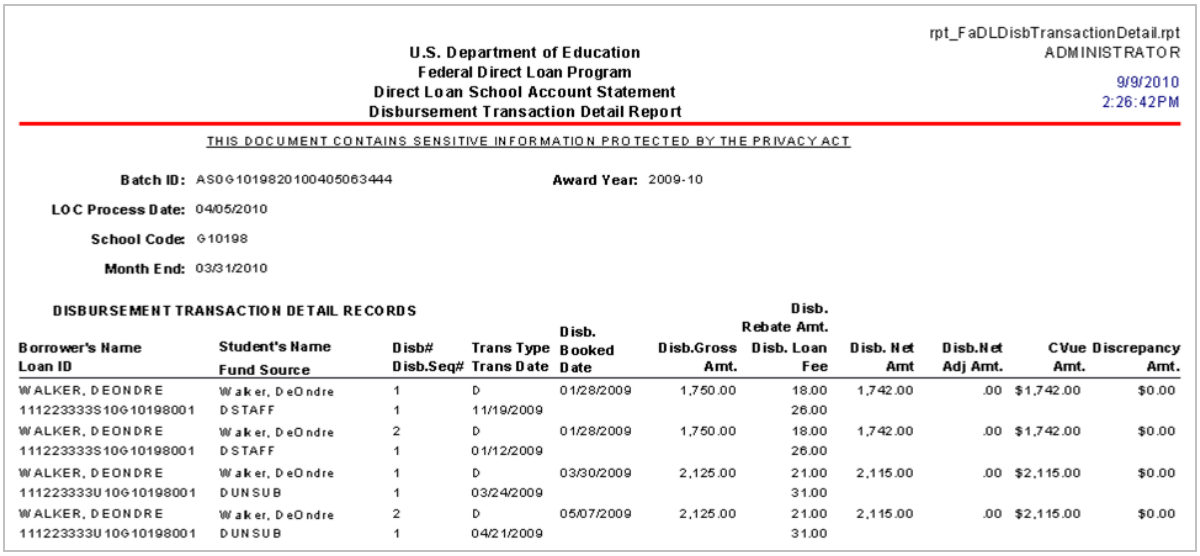
1. Navigate to **Daily** > **Financial Aid** > **Import Data** > **COD**. This opens the **COD Import** form.
2. Select the **Direct Loan** option.
3. Select the **File Type** to be imported (refer to the bullet list above for selection options).
4. Select the **FA Award Year** from the drop-down list and click **Next**.
5. Select the **File to import**. Click the browse button beside the text box to open a file selection form. The form will list only the files that are appropriate for the file type you selected.
   Select one of the listed files and click **Open** to choose it for the import process. The browse form will close and the directory path and file name will be entered in the text box on the wizard form.
6. Click **Process**. A confirmation message is displayed. Click **Yes**.
7. CampusNexus Student finishes importing the Direct Loan file and displays another confirmation message. CampusNexus Student also prepares a report listing the data that has been imported. It may take a few seconds for the report to appear in the preview window.
8. Click **OK** to acknowledge the confirmation/printing report message.
9. Preview and print the report for your files. Close the report preview window when you are done.

School Account Statement

The School Account Statement (SAS) file is sent by COD to the school. It lists the data and status of all direct loan records on file for the school. It includes cash summary, cash detail, and loan detail records. A report is prepared showing the results of the import.

To allow schools to reconcile the detailed information provided in the SAS import file with their system data, you can generate a report that compares the disbursement transaction details on file at COD against the paid disbursement information within CampusNexus Student. The Amt and Discrepancy Amt columns on the Disbursement Transaction Detail report, allow you to compare the data in the import file against the disbursement information in CampusNexus Student. This Reconciliation Process is

only applicable when importing the SAS (DSDF##OP.XXX) file. Additionally, the SAS file can be re-imported as needed to get a real-time comparison of the disbursement transaction details.



rpt_FaDLDisbTransactionDetail.rpt
ADMINISTRATOR
9/9/2010
2:26:42PM

U.S. Department of Education
Federal Direct Loan Program
Direct Loan School Account Statement
Disbursement Transaction Detail Report

THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT

Batch ID: AS0G10198201004050634444 **Award Year:** 2009-10

LOC Process Date: 04/05/2010

School Code: G10198

Month End: 03/31/2010

DISBURSEMENT TRANSACTION DETAIL RECORDS

Borrower's Name / Loan ID	Student's Name / Fund Source	Disb# / Disb.Seq#	Trans Type / Trans Date	Disb. Booked Date	Disb.Gross Amt.	Disb. Rebate Amt. / Disb. Loan Fee	Disb. Net Amt	Disb.Net Adj Amt.	CVue Amt.	Discrepancy Amt.
WALKER, DEONDRE	Walker, DeOndre	1	D	01/28/2009	1,750.00	18.00	1,742.00	.00	$1,742.00	$0.00
111223333S10G10198001	DSTAFF	1	11/19/2009			26.00				
WALKER, DEONDRE	Walker, DeOndre	2	D	01/28/2009	1,750.00	18.00	1,742.00	.00	$1,742.00	$0.00
111223333S10G10198001	DSTAFF	1	01/12/2009			26.00				
WALKER, DEONDRE	Walker, DeOndre	1	D	03/30/2009	2,125.00	21.00	2,115.00	.00	$2,115.00	$0.00
111223333U10G10198001	DUNSUB	1	03/24/2009			31.00				
WALKER, DEONDRE	Walker, DeOndre	2	D	05/07/2009	2,125.00	21.00	2,115.00	.00	$2,115.00	$0.00
111223333U10G10198001	DUNSUB	1	04/21/2009			31.00				

Note: We incorporated some changes from COD into the import for the School Account Statement. The changes were applicable beginning with the week of September 30, 2002 when the reports were distributed by COD. The message class affected is DSDF03OP.

YTD Rebuild

See Import Direct Loan YTD Rebuild for a discussion of this import file.

Import Direct Loan YTD Rebuild

Note: Please refer to Import Direct Loan for more information about importing direct loan data.

A "YTD Rebuild" option is included in the "File Type" drop-down list on the Direct Loan Import form. When you select this file type, and click , the file filter is set to "DLRB*.*".

For the 2002-03 award year, the message class is DLRBLDOP.XXX.

Direct Loan YTD Form

A new "Direct Loan YTD" form has been added for importing Direct Loan Rebuild files. This form is called from the Direct Loan Import form when the "YTD Rebuild" option is selected along with a DLRB*.* file.

Award Year - The selected award year is a read-only field. The award year has already been selected on the previous form (frmFaDirectLoanImport).

Campuses - select all that apply. The campuses displayed on the right side of the form depend on the Direct Loan ID from the header record AND the campuses to which the logged in user has access. The ability to specify All campuses or selected campuses is enabled ONLY if you answer yes to the "Update CampusNexus Student tables" question. If you answer no, the campus selection criteria is not applicable. The default answer to the "Update CampusNexus Student tables" question is no.

Direct Loan ID - The Direct Loan ID is a read-only field. The Direct Loan ID is determined from the header record in the import file.

Update CampusNexus Student Tables? - select **Yes** to update the tables, or select **No** to skip the update. If you choose to update the CampusNexus Student tables with the rebuild file, the program will populate the FaLoan and FaDIDisb tables with data from the rebuild file.

The three report questions give you the ability to generate a report showing the contents of the rebuild file. The default answer to the Generate Origination and Generate Disbursement report questions is no. The default answer to the Generate Origination/Disbursement report is yes. The three questions provide maximum flexibility to see Origination data only, Disbursement data only, or both on one report.

Generate Origination Report? - select **Yes** to update the tables, or select **No** to skip the update.

Generate Disbursement Report? - select **Yes** to update the tables, or select **No** to skip the update.

Generate Orig/Disb Report? - select **Yes** to update the tables, or select **No** to skip the update.

After you specify the criteria on this form and click Continue, validation will be performed. The program checks the rebuild file and verifies that there is at least one record for the award year specified. If no detail records are found that satisfy this criteria, the program displays the following message and ends the process.

"No detail records were found in the selected rebuild file for award year ####-##".

If you answered Yes to the "Update CampusNexus Student Tables" question, the program checks if the file has already been imported. If so, the program displays a warning message.

"WARNING! This file has already been imported and updated to the CampusNexus Student tables." Two buttons are in the message box: Continue and Cancel. If you click Cancel, the process ends.

The program provides a report–"Direct Loan Rebuild Import File"–that will list the results of the file import. This report will be generated automatically if you chose to update the CampusNexus Student tables with the rebuild file.

Import Pell

Go directly to the Pell import procedure.

The U.S. Department of Education's (ED) Recipient Financial Management System (RFMS) sends several Pell-Grant-related file types to your school in response to files you export. Use this form to import these file types into CampusNexus Student. The files will typically reside in the directory on your system that is shared with your EDconnect software. EDconnect is used to receive the files from ED. The default directory must be configured.

Pell grants are now processed through the COD Import wizard.

The file types that you can import using this form include:

- Origination Acknowledgement (PGOA##OP.XXX)
- Disbursement Acknowledgement (PGDA##OP.XXX)
- Special Disbursement Acknowledgement (PGSD##OP.XXX) (The Special Disbursement Acknowledgement option has been removed for 2001 – 02. It is no longer used.)
- Electronic Statement of Account (PGAS##OP.XXX)
- Institution Data Acknowledgement (PGIA##OP.XXX) (Discontinued for 2002 - 03 award year)
- Data Request Acknowledgement (PGRA##OP.XXX)
- Multiple Reporting Records (PGMR##OP.XXX)
- Year to Date Records (PGYR##OP.XXX)
- SSN/Name/DOB Change Report (PGSN##OP.XXX)
- Reconciliation File Acknowledgement (PGRC##OP.XXX)
- ACG - Electronic Statement of Account (AGAS##OP.XXX)
- Smart - Electronic Statement of Account (SGAS##OP.XXX)

The procedure for importing all of these file types is similar, so only the first type is illustrated here. Depending on which of the file types you import, a report of the imported data will be available after the file is processed.

Pell Processing for 2002 – 03

CampusNexus Student has been updated to handle Pell Processing for the 2002 – 03 award year. The changes touch several areas in the Financial Aid module. The changes reflect the on-going transition from the RFMS system to the COD system. One such change is the elimination of references to "RFMS" in documentation about the new award year. Following is a list of the import functions in CampusNexus Student affected by the Pell changes for 2002 – 03.

- To conform to the changes in Pell Processing for 2002 – 03, the term "RFMS" will no longer be used in CampusNexus Student to refer to Pell. The correct terminology on all reports and menus will be "Pell Processing". (If there is limited space "Pell" is acceptable).
- It is no longer possible to import the Institution Data Acknowledgement File. This is removed from the options on the Daily / Financial Aid / Import Data / Pell Processing file list.
- You can import the 2002 – 03 Origination Acknowledgement files using the new 2002 – 03 layout and generate a report of the imported acknowledgements. The imported file of Origination Acknowledgements contains a count of duplicate records. This data element will be added to the report. The procedure that imports the Origination and Disbursement Acknowledgement records will write the number of duplicate records to the FA batch export/import table. A report will be printed after processing with all accepted and rejected loans (with comments based on the reject code).
- The Origination Acknowledgement Import records will indicate a negative pending dollar amount that will be presented on the Origination Acknowledgement Report.
- You can import the new message class "PGSNOP03" file (SSN/Name/DOB Change Report) and generate a report that conforms to the technical reference specifications for 2002 – 03.
- The maximum Disbursement Reference Number that CampusNexus Student can assign to a disbursement in the

FA Pell Disbursements table has been changed from 89 to 65.

- You can import and print a statement of account (PGAS03OP) report.
- You can import PGMR03OP files (Multiple Reporting Records) for 2002 – 03 and generate a report.
- You can import the PGRC03OP file (Reconciliation) for 2002 – 03 and prepare a report.
- You can import the PGYR03OP file (Year-To-Date) for 2002 – 03 to update the CampusNexus Student database.

Reconciliation File Acknowledgement (PGRCXXOP)

When you select the Reconciliation File for import, the program displays some reporting options. You can:

- Print all students.
- Print only students where the origination amount is not equal to the amount in CampusNexus Student.
- Print only students where the YTD Disbursement Accepted is not equal to the amount in CampusNexus Student.
- Print only students where the POP flag is yes.

Determining if an entire batch was rejected:

The header record contains a field with batch reject reasons. An entire batch is rejected if there is at least one code in this field where Message Type = 'E'. If the Message Type = 'W', the code is only a Warning and does not mean that the batch was rejected.

Importing the YTD Pell File

You can specify all campuses or specific campuses to update. The default campus selection is All Campuses. The campuses listed will be the campuses to which you have access. The program will update only those students whose most recent enrollment record is attached to a campus that has been selected for the update.

A form is used to obtain the necessary parameters for the import. The form will be activated when the "Next" button is clicked. The campus selection form is displayed if you elect to update the CampusNexus Student tables with the YTD import file. The default answer for the Update CampusNexus Student RFMS Files question is no.

The logic for producing the reports at the end of the import remains unchanged. All records in the file will be included on the reports regardless of the campus criteria. The only change on the reports is the addition of the student's Campus code to each report.

The Transaction ID is shown on the Origination Acknowledgement Report.

When importing Pell YTD files, there are three reports generated:

- Origination Detail Listing
- Disb Detail Listing
- Summary

Totals on the reports include:

- A total for the Origination Listing from the detail on the report.
- A total for the Disbursement Listing from the detail on the report.
- Totals from the trailer record of the Summary Listing.

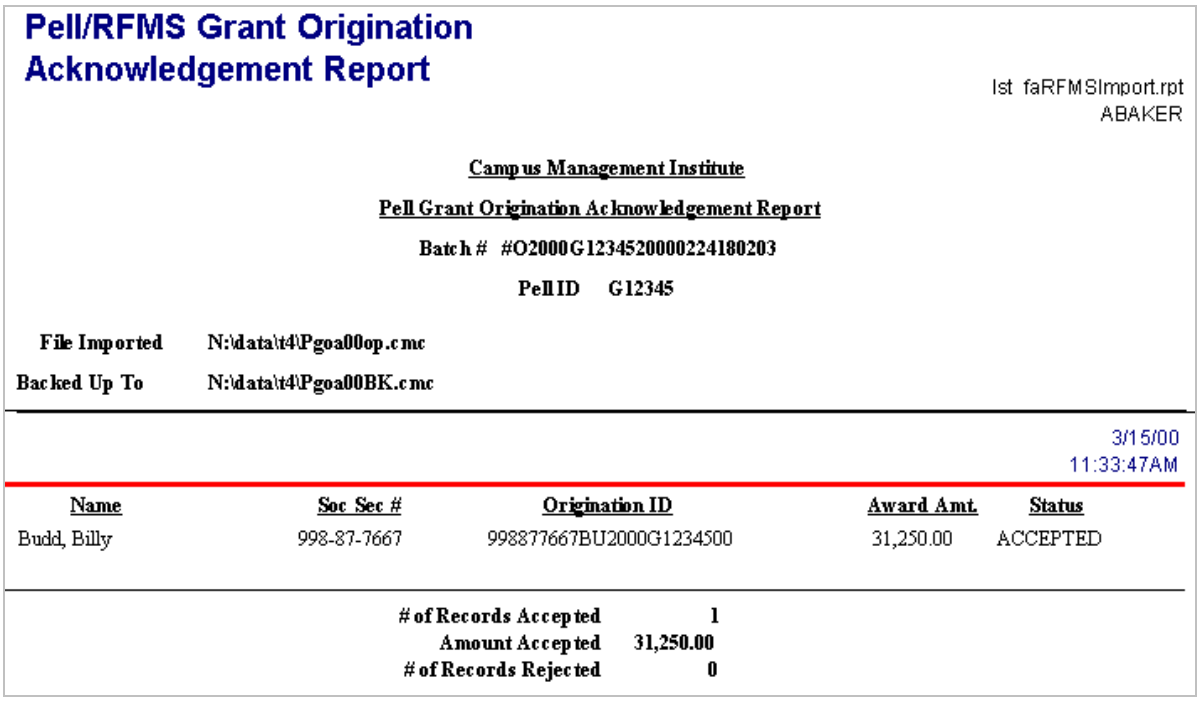
To import Pell grant files:

1. Navigate to **Daily** > **Financial Aid** > **Import Data** > **Pell**.

   You must now select **Daily > Financial Aid > Import Data > COD path** to import Pell. The Pell Import wizard is displayed.

2. Select the **FA Award Year**.
3. Select the **File Type** to be imported.
4. Select the **File Name**. Click ... beside the text box to open a file selection form. The form will list only the files that are appropriate for the file type you selected.
5. Select one of the listed files and click **Open** to choose it for the import process. The browse form will close and the directory path and file name will be entered in the text box on the wizard form.
6. Click **Import**. A confirmation message is displayed. Click **Yes**.
7. CampusNexus Student finishes importing the Pell grant file and displays another confirmation message. CampusNexus Student also prepares a report listing the data that has been imported.
8. Click **OK** to acknowledge the message. After the message is acknowledged, the **Print** button will appear on the Pell RFMS Import wizard form.
9. Click **Print** to print the report related to the file you imported. The sample report shown here is for the Pell Grant Origination Acknowledgement. The student's campus has been added to the student detail record.

   After printing the report, click **Finish** on the import wizard form to close it.



Pell/RFMS Grant Origination Acknowledgement Report

lst faRFMSImport.rpt
ABAKER

Campus Management Institute

Pell Grant Origination Acknowledgement Report

Batch # #O2000G1234520000224180203

Pell ID G12345

File Imported	**N:\data\t4\Pgoa00op.cmc**
Backed Up To	**N:\data\t4\Pgoa00BK.cmc**

3/15/00
11:33:47AM

Name	Soc Sec #	Origination ID	Award Amt.	Status
Budd, Billy	998-87-7667	998877667BU2000G1234500	31,250.00	ACCEPTED

# of Records Accepted	**1**
Amount Accepted	**31,250.00**
# of Records Rejected	**0**

Disbursements

Note: When an entire batch of disbursements is rejected, the disbursement status for each disbursement will be set to "E - Error".

The Reject Code descriptions are shown on the report produced by this option.

Create Test Imports

This menu option is restricted to the CampusNexus Student System Administrator and the Financial Aid Administrator.

A significant challenge occurs when a new CampusNexus Student system is set up and it becomes necessary to test the financial aid import features of the system. To assist in this setup function, CampusNexus Student provides a means to create certain test files for imported FA data. The data for the import test files comes from the related export files. For example, when you export a group of FAFSAs, CampusNexus Student can use the export batch file, from which the EAPS##IN file export file is created, for data to create corresponding ISIR import records with the appropriate file name (EAPS##OP.CMC).

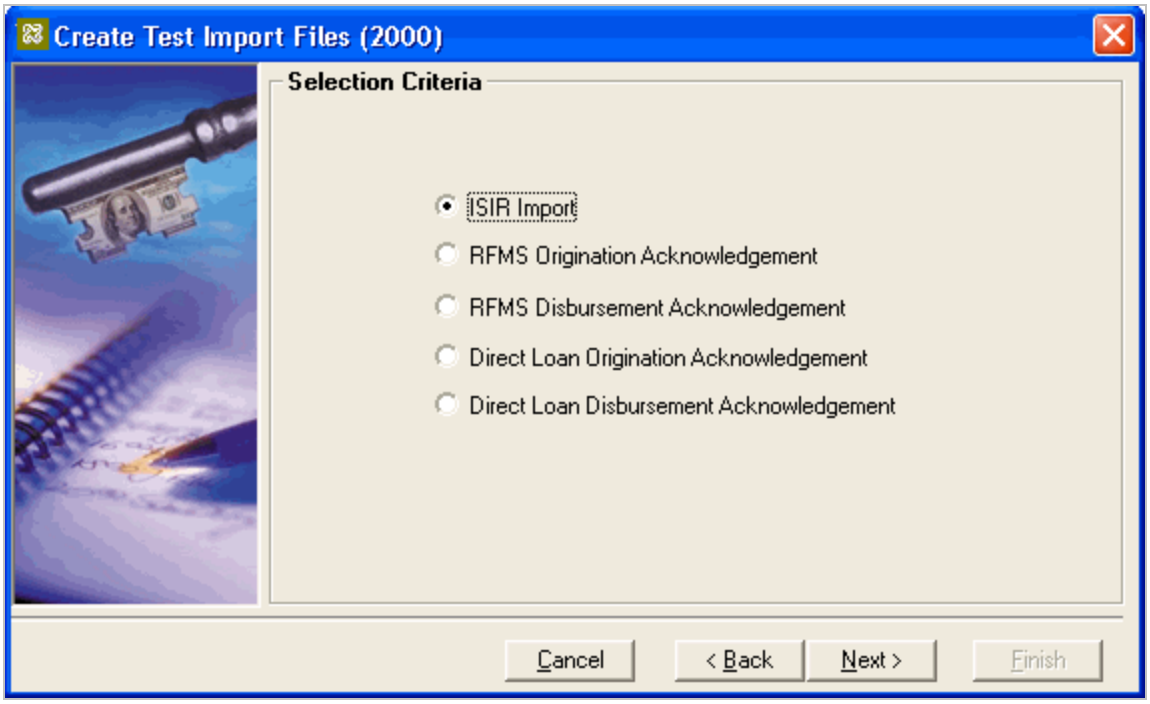
Note: For the latest content about FAFSA, ISIR and COD processing, access Regulatory Help.

At the time this topic is being written, five import file types can be created from 1999-00 export files. They include:

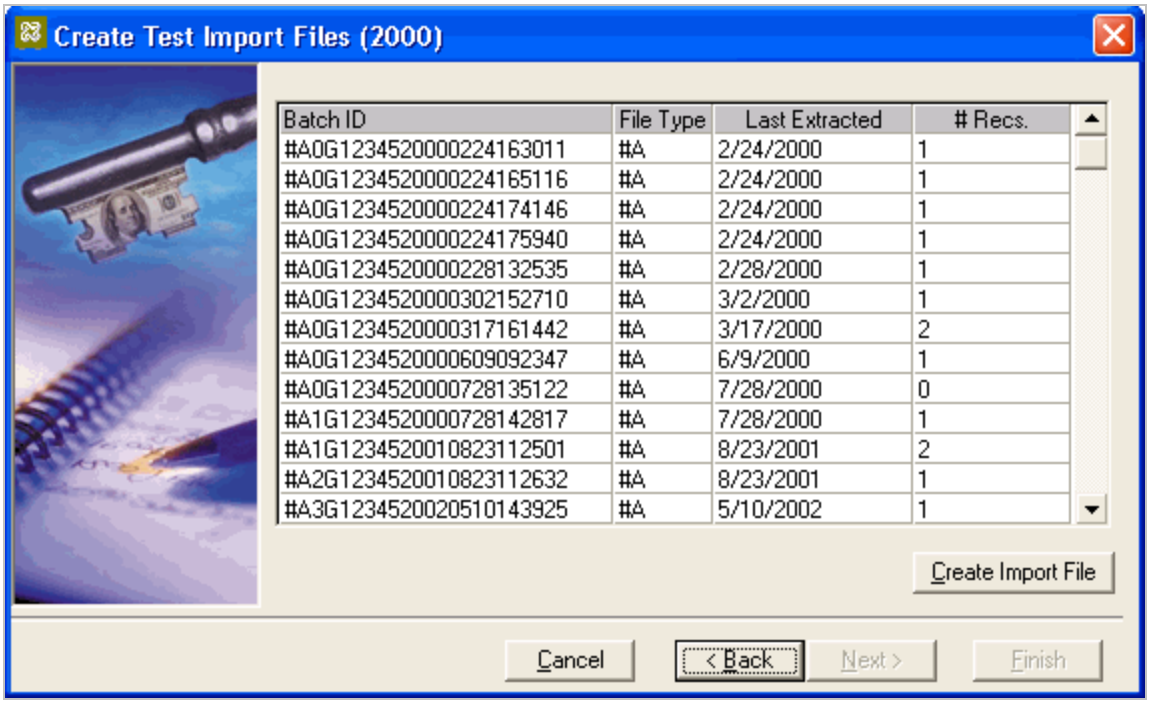
- ISIR Import (EAPS00OP.CMC)
- RFMS Origination Acknowledgement (PGOA00OP.CMC)
- RFMS Disbursement Acknowledgement (PGDA00OP.CMC)
- Direct Loan Origination Acknowledgement (DISF00OP.CMC)
- Direct Loan Disbursement Acknowledgement (DIOD00OP.CMC)

To create the test import files:

1. Navigate to **Daily > Financial Aid** > **Import Data** > **Create Test Imports**. The Create Test Import Files wizard is displayed.



2. Click one of the listed file types.
3. Click **Next**. The second page of the wizard is displayed.



4. Select one of the Batch ID records on the grid. If there are no batches listed, you have not yet exported a file of the type required for creating the import file.
5. Click **Create Import File**. CampusNexus Student examines the selected batch file and creates the import test file in the proper format. When the file creation process is finished, a confirmation message displays the directory path and name of the test file. All test files have a file extension of ".CMC". Write this information down for use when you work with the Financial Aid Import Data wizard.
6. Click **OK** to close the confirmation message.
7. Click **Finish to** close the wizard.
8. Click **Back** to go back to page 1. You can select a different file type and go through the process again.

When you are using the Financial Aid Import Data wizard after having created test import files, you can identify the test files by their ".cmc" extensions.

Import TEACH Grant

The U.S. Department of Education's (ED) Common Origination and Response (COD) System sends several grant file types (including the TEACH Grant) to your school in response to files you export. Use this form to import these file types into CampusNexus Student. These files will typically reside in the directory on your system that is shared with your EDconnect software. EDconnect is used to receive the files from ED. The default directory must be configured.

TEACH Grants are processed through the COD Import wizard.

The file types that you can import through this form are:

- ATS Note Acknowledgement Award Year Specific (CRAT##OP.XXX)
- Multiple Reporting Records (THMR##OP.XXX)
- School Account Statement - Monthly (THSM##OP.XXX)
- School Account Statement - YTD (THSY##OP.XXX)
- Pending Disbursement List THPD##OP.XXX)
- Inactive Grants Report (THIGPFOP.XXX)
- SSN/Name/DOB Change Report (THSNPFOP.XXX)
- Rebuild (THRB##OP.XXX)
- ATS Discharge Report (ATSDISPOP.XXX)
- Counselling Acknowledgement (CRAC##OP.XXX)

When the ATS (Agreement to Serve) Note Acknowledgement Award Year Specific file is imported from COD, the student's TEACH Grant records will be updated. The ATS Acknowledgement for a student may be viewed at **View** > **Financial Aid** > **Awards** > **Add/Edit** (button) > **ATS** (tab).

The COD system will accept and return TEACH Grant Data in TEACH specific message classes.

TEACH Message Classes

Input	Output	Description
COMRECIN	COMRECOP	Common Record, Non-Program Specific, Non-Award Year Specific
CRAAYYIN	CRAAYYOP	Common Record, Non Program Specific, Award Year Specific
CRTHYYIN	CRTHYYOP	Common Record, TEACH, Award Year Specific
CRTHMYIN	CRTHMYOP	Common Record, TEACH, Non-Award Year Specific
COMRECIN	COMRECOP	Receipt, Non Program Specific
CRAAYYIN/ CRTHYYIN	CRRCYYOP	Receipt, Award Year Specific

Note: When "YY" appears in the message class, it refers to the actual Award Year (that is, 10 for the 09/10 Award Year).

The following reports will be produced when an import of TEACH file is performed:

- Import & Export Reports
- COD Response Report
- Reject Report (if items rejected by COD)

To import TEACH grant files:

1. Navigate to **Daily** > **Financial Aid** > **Import Data** > **COD**. The COD Import wizard is displayed.
2. Click the **TEACH** radio button.
3. Select the **File Type** to be imported.

4. Select the **File to Import** from the **Files Available** list. Or, click beside the text box to open a file selection form. The form will list only the files that are appropriate for the file type you selected.
5. Select one of the listed files and click **Open** to choose it for the import process. The browse form is closed and the directory path and file name is entered in the text box on the wizard form.
6. Click **Process**. A confirmation message is displayed. Click **Yes**.
7. CampusNexus Student finishes importing the TEACH grant file and displays another confirmation message. The program also prepares a report listing the data that has been imported.

   Note: COD edit codes associated with this import are described in this report.
8. Click **OK** to acknowledge the message. After the message is acknowledged, the **Print** button is displayed on the **COD GRANT Import** wizard form.
9. Click **Print** to print the report related to the file you imported.
10. After printing the report, click **Finish** on the **COD GRANT Import** wizard form to close it.

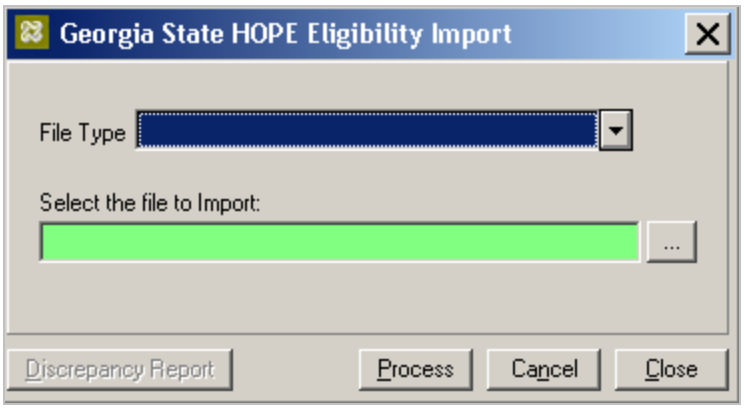
Note: Options may vary within the **COD GRANT Import** wizard depending on the file type selected.

HOPE Import

The HOPE data is imported and any discrepancies between the CampusNexus Student data and the data received from the State of Georgia can be evaluated within this feature. The imported data will appropriately update the student data, indicating which students are eligible, and which students are ineligible, for the funds.

To import the HOPE data:

1. Navigate to **Daily > Financial Aid > Import Data > State Reporting > Georgia > HOPE-Import**. The Georgia State HOPE Eligibility Import form is displayed.



2. Select the **File Type**. The available options are "Eligible File" or "Ineligible File".
3. To select the file to be imported, click ... next to the **Select the File to Import** field to navigate to the folder containing the file to be imported.
4. Click the **Process** button to import the file.
5. Once the file to be imported is selected and processed, the **Discrepancy Report** button can be clicked to create a report that can be viewed, printed and or saved to a specified location. The discrepancies between what is submitted by the state via SURFER, and what is contained in the CampusNexus Student database include:
    - Students that appear on the eligible list from the state but do not have a HOPE or Zell Miller Scholarship or Grant tied to their enrollment with a disbursement status other than Canceled.
    - Students that appear on the ineligible list from the state that have been incorrectly packaged for a HOPE or Zell Miller Scholarship or Grant. It also includes the award information.

These reports will not include students that appear in the file but were not found in CampusNexus Student.

Servicer Integration Overview

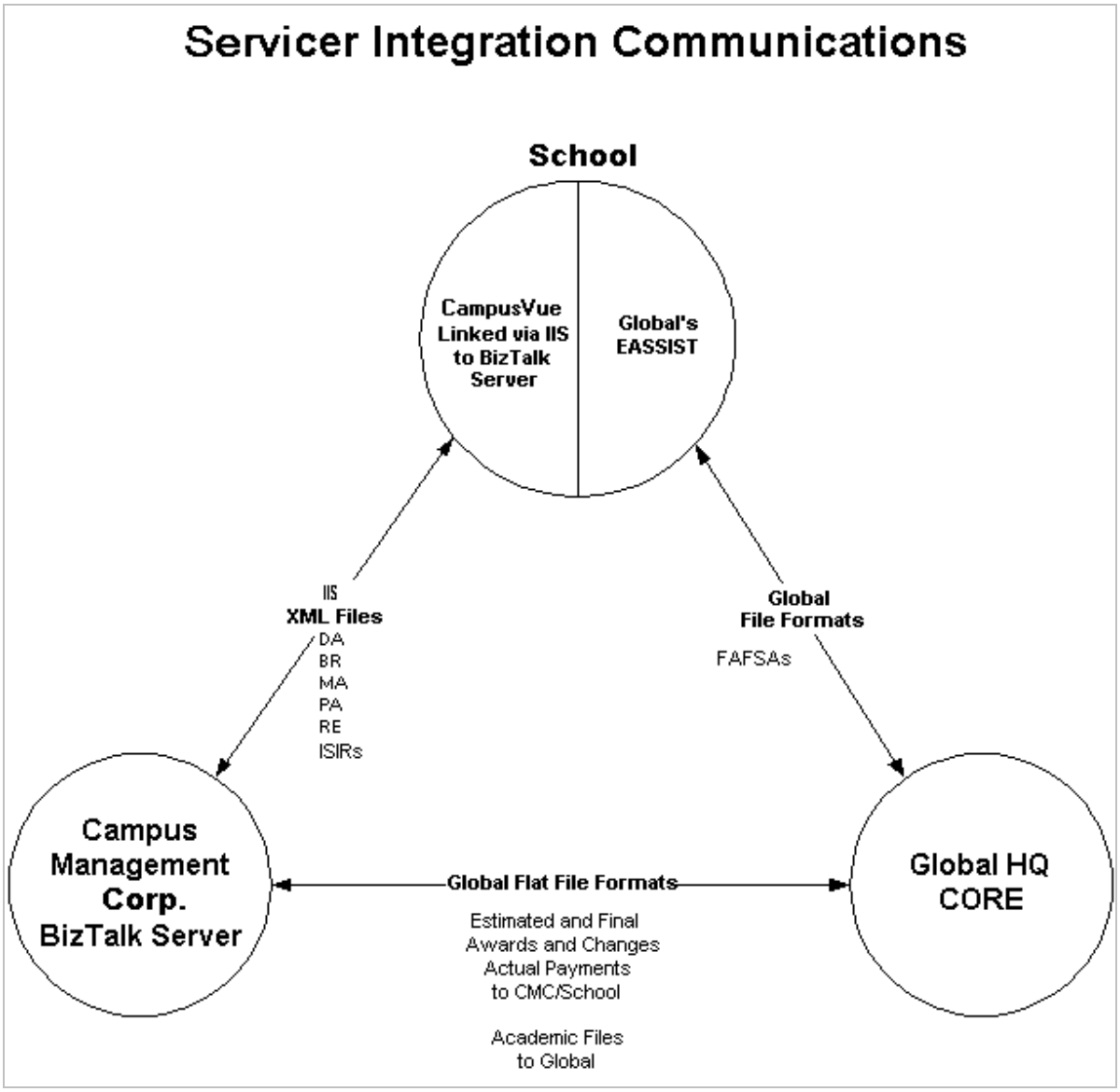
- Example Process
- Hardware Requirements
- Servicer Setup
- Servicer Processing Setup Procedures
- EASSIST
- File Transmission Setup and Testing
- Daily Processing
- Identifier Match
- Notifications
- Exception Resolution

CampusNexus Student provides servicer integration for financial aid processing to exchange data with Global. Interaction of school staff in the sending and receiving procedures is largely limited to supervision of the process and exception handling. Manual copying of data from one system into the other is greatly reduced.

The goal of the integration strategy between Global and Anthology Inc. is to minimize duplicate data entry and, in the future, offer real-time transactional financial aid processing. The exchange of data takes place on an ongoing basis, replacing the existing batch processes and eliminating the user interaction to import and export data files in batches.

The Global integration minimizes manual data entry in CampusNexus Student by importing Global data files directly into the CampusNexus Student database.

The existing formats of all of Global data files are in flat or database files. Anthology Inc. is committed to importing data only in the format of XML (eXtensible Markup Language). This eliminates the time required to develop several flat file imports from various sources. The Global files are translated to meet the CampusNexus Student XML import specifications using Microsoft's BizTalk to map and manage the various transactions that are transmitted between the school, Global, and CampusNexus Student.



Note: If your school uses a servicer link, you must disable it. Use RFMS and DL (select the No option) for all award years. All campuses sharing the same Reporting Pell ID or Direct Loan ID must use a servicer or CampusNexus Student. Schools sharing an ID cannot be split. For example, if two campuses share a reporting Pell ID, one cannot 'use RFMS' or Direct Lending in CampusNexus Student while the other is set up to use Global. Campuses in the same database can use different features, as long as they have different identifiers.

Files Imported from Global

File Name	Description
CLFAFAID	Identifier File
MA	Scheduled Awards*
BR	Budget File
DA	Scheduled Disbursements*

File Name	Description
PA	Actual Disbursements
CA	Change File
RE	Refund File
AR	Tuition Adjustments
AP	R2T4 Refunds

*Each MA file is accompanied by a DA file. You will not receive a DA file without a corresponding MA.

Note: The file naming convention is **nnYYMMDDxx.###**, where **nn** is the file type (for example MA, DA, BR, etc.), **xx** is the file sequence number (01, 02, ..., thereby allowing multiple files of the same type to be sent on a given day), and **###** is the school code extension that matches the configuration on the campus level within CampusNexus Student. For example, a file with the name PA10030902.112 would indicate the second Payment file sent for the school with code 112 on March 9, 2010.

Example Process

The typical Global/CampusNexus Student user, after phase one of the integration strategy, will be similar to this example:

Betsy is a FA Officer. She will key her student's FAFSA into EASSIST. The FAFSA will be transmitted to the Department of Education, and returned to Global's CORE system. Global analysts use the budget and disbursement information provided to them by the school, through the EASSIST application, to estimate the student's financial aid award. This information will be sent to Anthology Inc.'s BizTalk server in two files: MA (scheduled awards) and DA (scheduled disbursements).

BizTalk will translate the files to CampusNexus Student XML import specifications and transmit the XML files via HTTPS to an Internet Information Server (IIS) receive function located at Betsy's School. This receive function will call the CampusNexus Student Application Proxy to transmit the files to the physical location of the CampusNexus Student and database servers. The message will be validated, and imported into the CampusNexus Student database at Betsy's school. The records will be flagged with a UserID for Global. The student will have scheduled aid records (FaStudentAid and FaStudentPell when applicable), as well as scheduled disbursement records (FaSched). Using the predefined disbursement schedules, CampusNexus Student will validate the scheduled disbursement to the appropriate term when required.

The student academic extract information is manually sent to Global by the academic records staff at scheduled intervals. The academic extracts for Global include the Weekly Extract, Pre-Pull Extract, and Add/Drop Extract.

Once Global receives notification that the student is in attendance and has met the attendance requirements for disbursements, Global creates a PA file and transmits it to the Anthology Inc. BizTalk Server for translation and transmission to CampusNexus Student. The file will be verified by the BizTalk server and transmitted to CampusNexus Student. On import, CampusNexus Student will validate the financial aid identifier to the FaStudentAid record.

In addition, using the payment amount and disbursement date from the previously scheduled disbursement information, the PA file will be used to create an approved disbursement batch. These records will be marked with a Global user ID, and the FA and SA contact persons are notified of the import via Contact Manager. Disbursement exceptions that failed to import are held in a temporary file for user review and update. Exceptions must be resolved before the batch is posted by Student Accounts.

If the scheduled award for the student changes prior to actual disbursement, or between the first and second disbursements, Global's change file (CA) is sent, translated, and imported to CampusNexus Student. These changes are captured in the new FaAudit fields. The procedure that updates this file notifies the FA contact person on import.

If the student withdraws or reduces his or her credit load, and a refund is required, Global is automatically notified by the AR extract. A refund file (RE) is sent to the school. After translation, the file is used to create scheduled refunds in CampusNexus Student. When the RE file is imported, the FA and SA contacts are notified via Contact Manager.

Global's Budget Period Start Date equates to CampusNexus Student's Academic Year Start Date.

Hardware Requirements

BizTalk servers are required at Anthology Inc.

Schools will not have on-site BizTalk servers. For file receipt and transmission, the school may use an existing (or new) Internet Information Server, on which the receive functions and the CampusNexus Student Application Proxy reside. Global will not require a BizTalk server until their application is transactional and generates XML files.

Servicer Setup

Coming From Class

If your school is currently using Class, and you have been processing financial aid using the servicer links in Class:

1. Perform a Weekly Academic Extract on the final day before conversion to CampusNexus Student and Go Live. Deliver this file to your servicer as a standard Weekly Extract.
2. Complete the CampusNexus Student servicer processing setup procedures below.
3. Once you are live on CampusNexus Student and you have completed the setup procedures, perform a Weekly Academic Extract. This will include all students that are currently in attendance. The status should equal the status that the servicer currently has on file. Deliver this file to the servicer for confirmation that the student and status data are correct. This should be performed on your first day of Go Live, prior to resuming electronic communication with your servicer.
4. Request a YTD ISIR file from your servicer. This file will be imported into CampusNexus Student. The assigned FA contact person will be notified in Contact Manager when the file is imported.
5. Request an Identifier file from your servicer. The file will be automatically imported when it is received. Notification will be sent to the FA individual identified during setup. Use the reconciliation reporting option in CampusNexus Student to confirm that records are associated with a servicer. Perform the exception resolution where necessary.

Exception Resolution must be performed before resuming additional file imports.

Using a Servicer for the First Time

If this is the first time that you are using a Servicer:

1. Complete the CampusNexus Student Servicer Processing Setup Procedures below.
2. Perform a Weekly Academic Extract. Confirm this file includes your active student population.
3. Depending on your method of start-up, mid-year conversions may require an Identifier import. Schools starting at the beginning of an award year will begin with the standard daily imports as aid is scheduled.

Servicer Processing Setup Procedures

See Servicer Configuration.

EASSIST

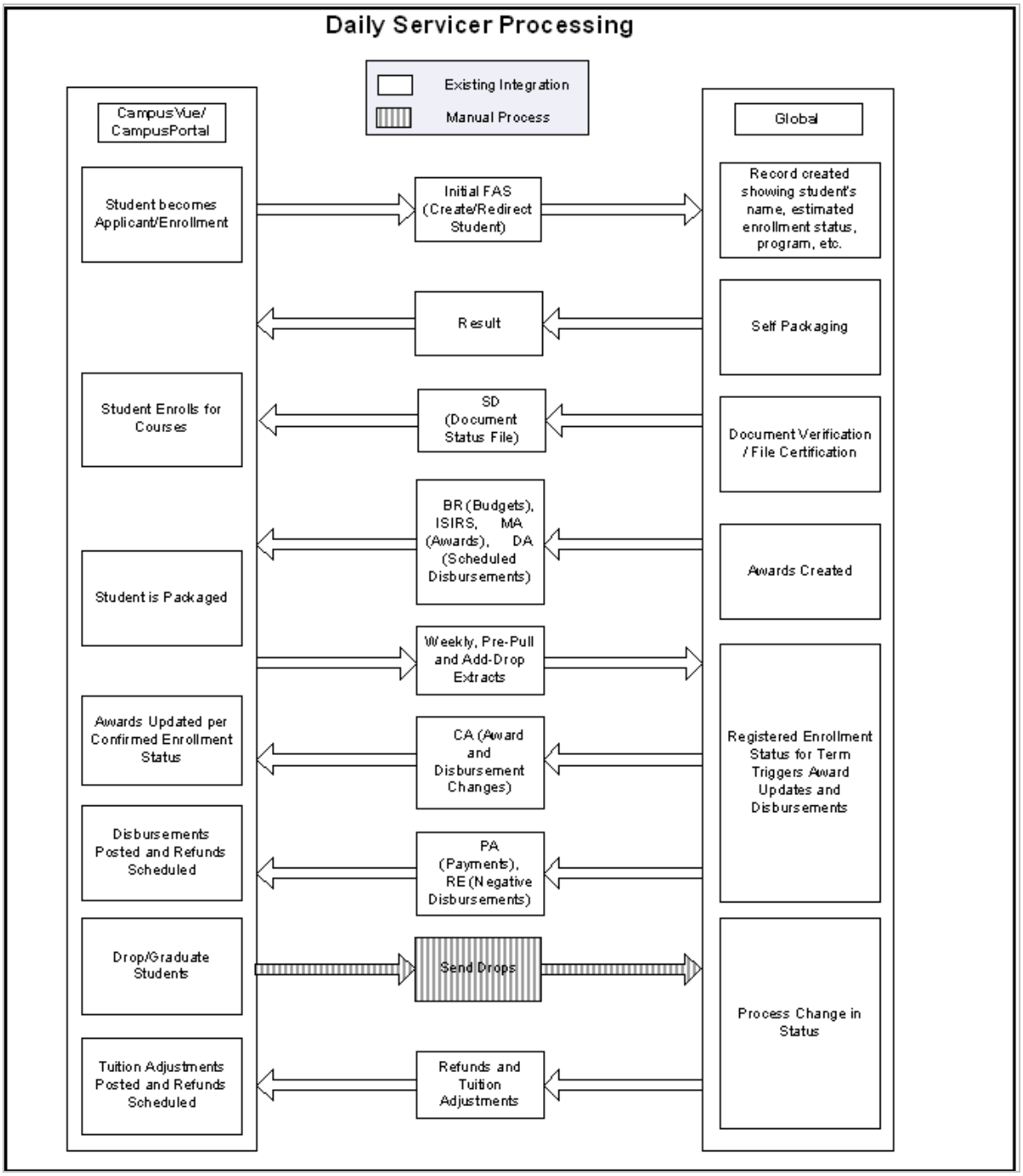
Complete all setup procedures in your servicer's application as defined by your servicer's setup procedures.

File Transmission Setup and Testing

Your servicer will need to notify Anthology Inc. of the Servicer School Code (three-digit File Transfer code) to map the BizTalk server to the school. Anthology Inc. will also need to know where on your Servicer's site the files will be pulled from and delivered to.

Anthology Inc. will need to verify, through tests, that we have access to the school's database and to the servicer delivery and retrieval sites. We will need to be in contact with your Information Technology (IT) team to get necessary addresses, and to resolve any potential network or fire wall issues that may arise.

Daily Processing in CampusNexus Student



Identifier Match

CLFAFAID Import

The purpose of the identifier match is to synchronize the aid on file in CampusNexus Student with the aid on file at your servicer. CampusNexus Student imports each record from your servicer and attempts to find the student based on his or her Social Security Number (SSN) within the campus identified in the import file. Once the student is found, it searches for the student's enrollment using the Start Date and Graduation Date from the import file.

Next, the program attempts to find the aid record. Using the Award Year, Amount (amount will always have a $1.00 tolerance), Fund Source, and Loan Period Start Date provided by your servicer, CampusNexus Student looks for an exact match on file. If no match is found, CampusNexus Student searches again for an exact match on all elements, allowing a thirty day discrepancy on the Loan Period Start Date. If no match is found on this attempt, one final attempt is made on an exact match for all data elements with the exception of the Award Year. If no match is found on this final attempt, a record is written to the exception file.

When a match is identified, it updates the unique Servicer Record ID to the data in CampusNexus Student so that future data elements imported for this scheduled aid will be associated with the record found. The amounts are never overwritten on an identifier import, and new records are not created as a result of this import. These changes, if necessary, can be handled during exception review.

Import Matching Logic

The following three tags have been added to the BR, MA, DA, PA, CA, and RE files to ensure all files coming from Global to CampusNexus Student match to the correct enrollments: Student ID, Enrollment ID, and Academic Year ID. The import matching logic will initially use the Student ID, Enrollment ID and Academic Year ID to locate the student for the BR and MA files. If no match is found, then the student will attempt to be located by SSN. When processing the DA file, these fields will be used to locate Disbursement Schedules for those who are configured to Require Terms on disbursements.

When importing the SD file, the logic must be able to match the document record by first attempting to use the Student ID and Enrollment ID that was sent in the SD file. If the match is not found, then an attempt will be made to locate the document record based on SSN.

Notifications

The staff member assigned as the Financial Aid contact will be notified via a predefined Contact Manager activity as each file is imported. The notification will include the type of file imported, the number of records, and the number of exceptions.

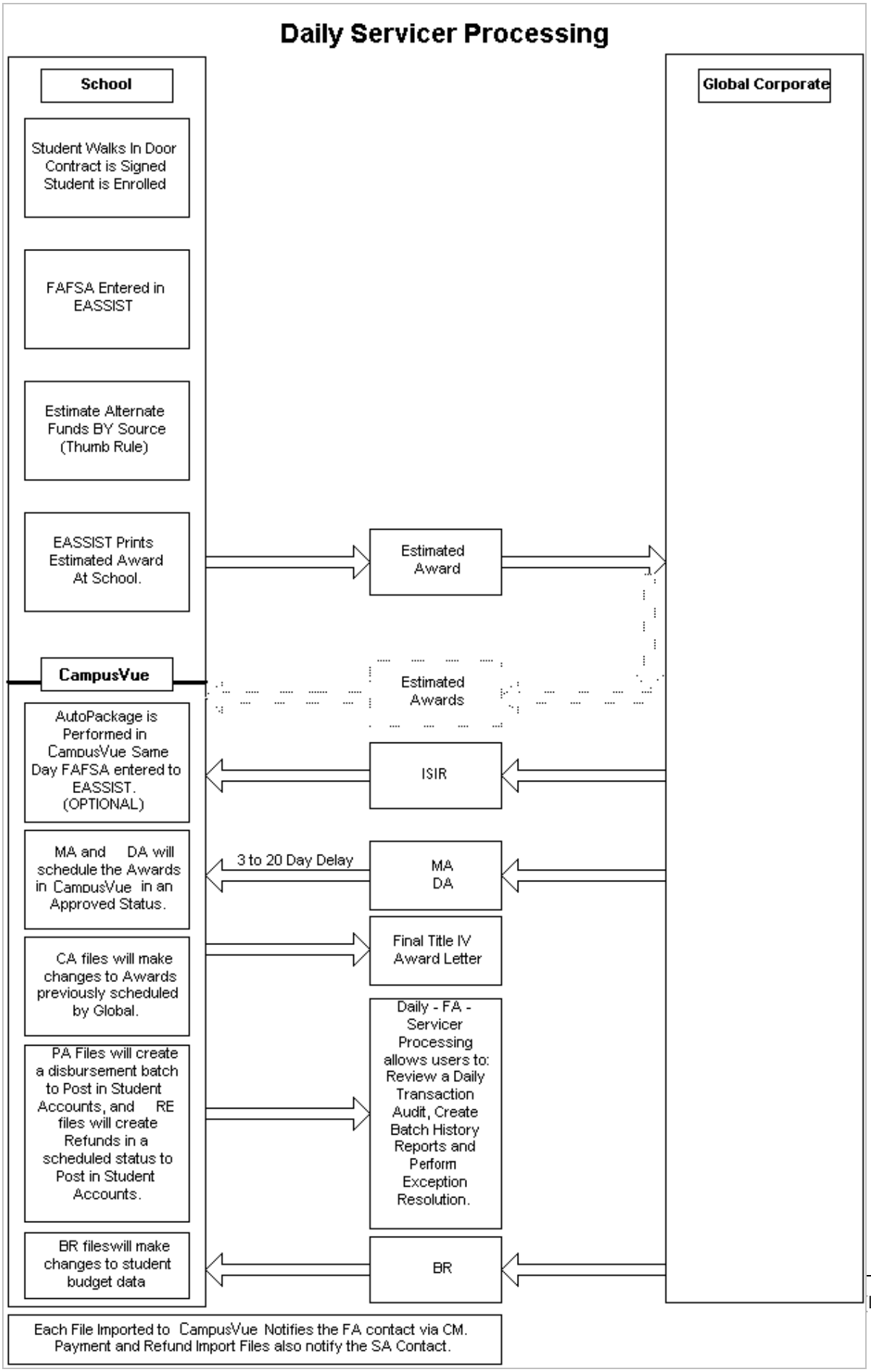
The staff member assigned as the Student Accounts contact will be notified with the same information when the file imported is a payment file (PA) or a refund file (RE).

Exception Resolution

This option is used to view and resolve exceptions found during the import process. This area will walk you through finding the resolution to update the records.

Note: This process should be performed daily.

When actual payments are received (PA files), exceptions must be resolved before the batch will be available to post in Student Accounts.



(Legacy Interface)

Servicer Daily Transaction Audit

This process is used to see a listing of aid records added by servicer import within a date range. You can also use it to produce a reconciliation report.

Servicer Batch History Report

With this option you can see a history of files imported and exported to and from your servicer.

Servicer Disbursement Batch Review

With this option, you can review all open disbursement batches created by a servicer import procedure. The program will show the amount of the approved disbursements. You can print a report of the accepted disbursements in the batch. The program will show you any exceptions found, and tell you if the batch is OK to post. Batches can be posted only when all exceptions are cleared through the Exception Resolution procedure. The printed reports will include only accepted disbursements, not those that are held in the exception file.

Any questions about the processes above should be communicated to Anthology Inc.

Servicer Batch History Report

The Servicer Batch History Report (rpt_FaServicerBatchHistory.rpt) is a listing of all import/export files transmitted to and from Global during the date range requested. If your campus is configured to enforce disbursement batch integrity, the report can be sorted using the **Parent Batch ID**, to allow you to track the parent disbursement batches.

The report selection criteria include:

- **Campus** - Shows a list of campuses where the user has access and SyCampus.ServicerLink is not equal to "N", "", or null.
- **Date Imported** - (Not Required) Enter a date range within which the files were imported XX/XX/XXXX to XX/XX/XXXX.
- **Date Exported** - (Not Required) Enter a date range within which the files were exported XX/XX/XXXX to XX/XX/XXXX.
- **Include Academic Record Extracts?** - Yes or No.

The report headings are School ID, File Type, File Name, Date Imported, Date Exported, # Records, # Records Accepted, # Records Rejected, and Batch ID.

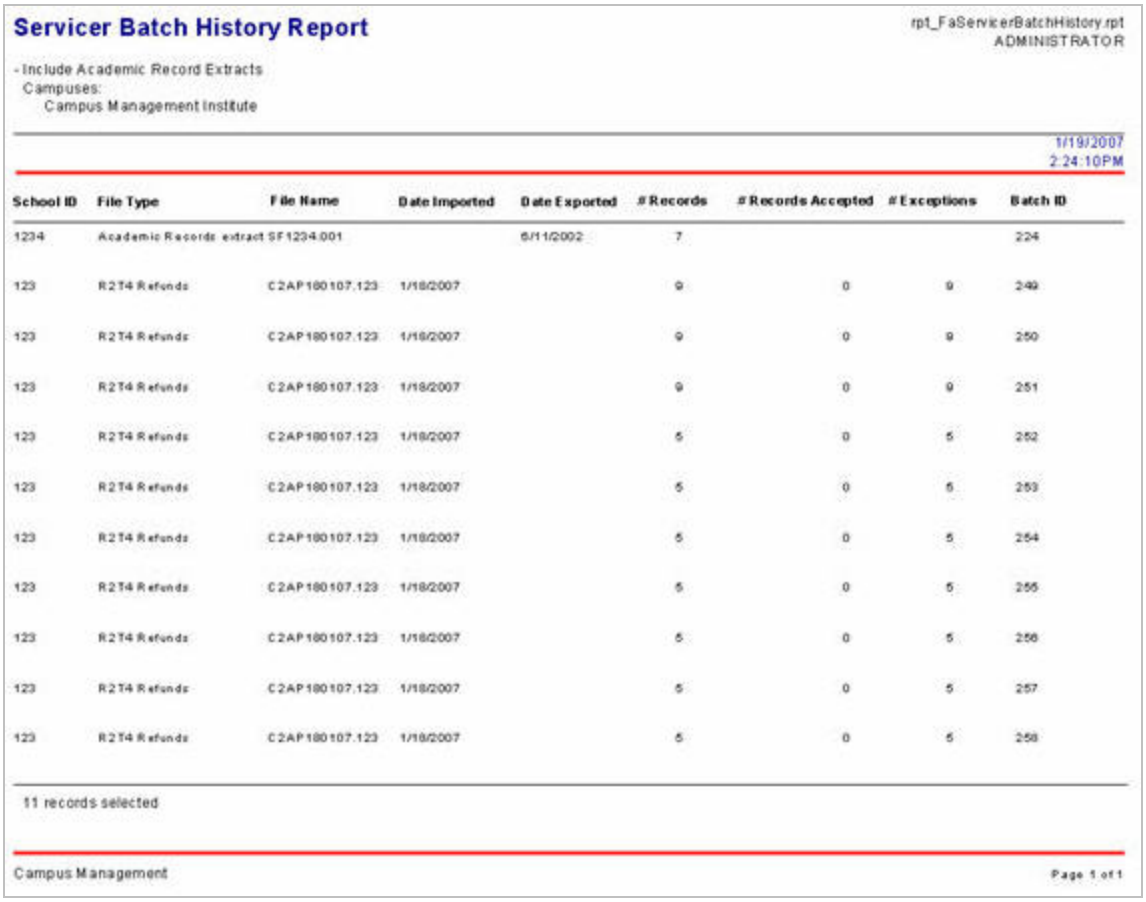
- **School ID** - FaBatchExpImp.SchoolID
- **File Type** - FaBatchExpImp.FileType

  P - Actual Disbursement
  D - Scheduled Disbursement
  C - Change File
  M - Identifier File
  R - Refund File
  A - Scheduled Awards
  X - Unknown
  AR - Academic Records Extract
  T - Tuition Adjustments
  F - R2T4 Refunds

- **File Name** - If the File Type is not "AR", FaBatchExpImp.FileNameImported, otherwise it is the FileNameExported.
- **Date Imported** - FaBatchExpImp.DateImported.
- **Date Exported** - FaBatchExpImp.DateExported (AR Extract Only).
- **# Records** - FaBatchExpImp.BatchRecords
- **# Records Accepted** - FaBatchExpImp.RecordsAccepted.
- **# Records Rejected** - FaBatchExpImp.RecordsRejected.
- **BatchID** - FaBatchExpImp.FaBatchExpImpID .

The view selects records from FaBatchExpImp where ExtImpType is "SERVICER" and meets other conditions. The FaBatchExpImpID is equal to SchoolID and SyCampus.PellID.

If academic record extracts are included, the Date Imported will be Empty and the Date Exported will show data.



Servicer Batch History Report

rpt_FaServicerBatchHistory.rpt
ADMINISTRATOR

- Include Academic Record Extracts
Campuses:
Campus Management Institute

1/19/2007
2:24:10PM

School ID	File Type	File Name	Date Imported	Date Exported	# Records	# Records Accepted	# Exceptions	Batch ID
1234	Academic Records extract	SF1234.001		6/11/2002	7			224
123	R2T4 Refunds	C2AP180107.123	1/18/2007		9	0	9	249
123	R2T4 Refunds	C2AP180107.123	1/18/2007		9	0	9	250
123	R2T4 Refunds	C2AP180107.123	1/18/2007		9	0	9	251
123	R2T4 Refunds	C2AP180107.123	1/18/2007		5	0	5	252
123	R2T4 Refunds	C2AP180107.123	1/18/2007		5	0	5	253
123	R2T4 Refunds	C2AP180107.123	1/18/2007		5	0	5	254
123	R2T4 Refunds	C2AP180107.123	1/18/2007		5	0	5	255
123	R2T4 Refunds	C2AP180107.123	1/18/2007		5	0	5	256
123	R2T4 Refunds	C2AP180107.123	1/18/2007		5	0	5	257
123	R2T4 Refunds	C2AP180107.123	1/18/2007		5	0	5	258

11 records selected

Campus Management

Page 1 of 1

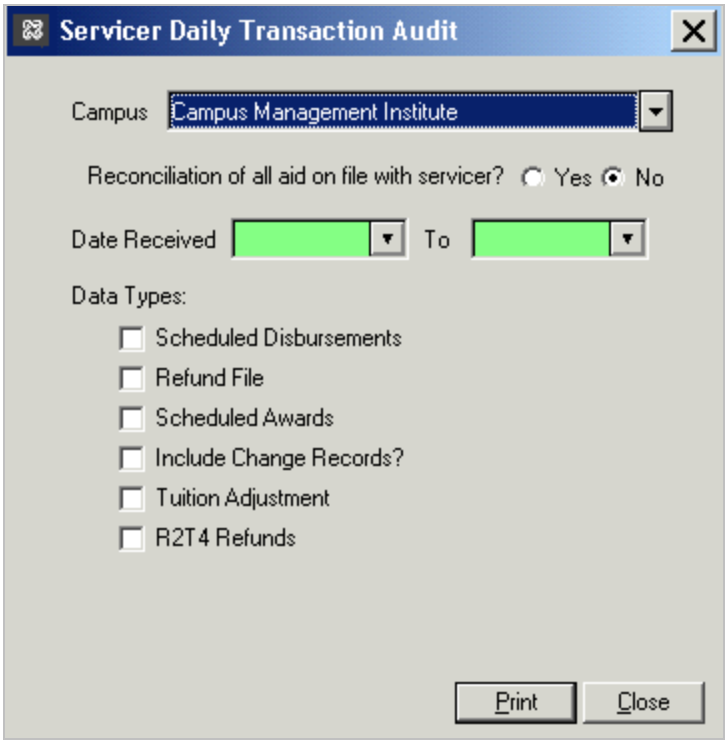
Servicer Daily Transaction Audit

The Servicer Daily Transaction Audit reports on all New Scheduled Awards, Scheduled Disbursements, or Scheduled Refunds received by servicer import in the date range requested. In addition, the user has an option of including change records received by the servicer in the same time frame. This report relies on the Global ID defined in Setup as the "Add User" of the record to determine which records were added in the dates selected. Another option on this report is to show a listing of all aid on file with a Servicer Record ID for reconciliation purposes.

Selecting the **Save Student Group** option from the Report Viewer menu options will invoke the system to display the 'Save New Group' screen. Students in the report can be saved to a Student Group by entering a 'Group Name', selecting a 'Group Type', indicate whether to make the group public by selecting the 'Make Group Public' check box, if applicable, and clicking the 'Save' button.

To perform the Servicer Daily Transaction Audit:

1. Navigate to **Daily > Financial Aid > Servicer Processing > Servicer Daily Transaction Audit**. The Servicer Daily Transaction Audit form is displayed. Use the filtering criteria on this form to generate a report as follows:



2. A list of campuses to which the user has access will appear in the Campus drop-down list.
3. The default for the Reconciliation of All Aid on File with Servicer? option is No. If yes, the program disables the rest of the selection criteria below and prompts for Award Year. The system will return all financial aid records for the servicer for the campus selected and a summary of each student's financial aid record including disbursements and refunds are displayed when the Print button is selected. If No, the Award Year prompt is disabled.
4. Users can enter a date range within which the files were imported in a XX/XX/XXXX or select date ranges from the Date Received drop-down lists. The field is required.
5. Place a check next to the applicable Data Types label. The data types options are Schedule Disbursements (D), Refund File (R), Schedule Awards (A), Include Change Records? (C), Tuition Adjustments (T), R2T4 Refunds (F).

Servicer Daily Transaction Audit Report

The report will sort by Campus and Student Name by default, and includes all data imported during the Date-Received date range and will display the following data elements by student for each type of record:

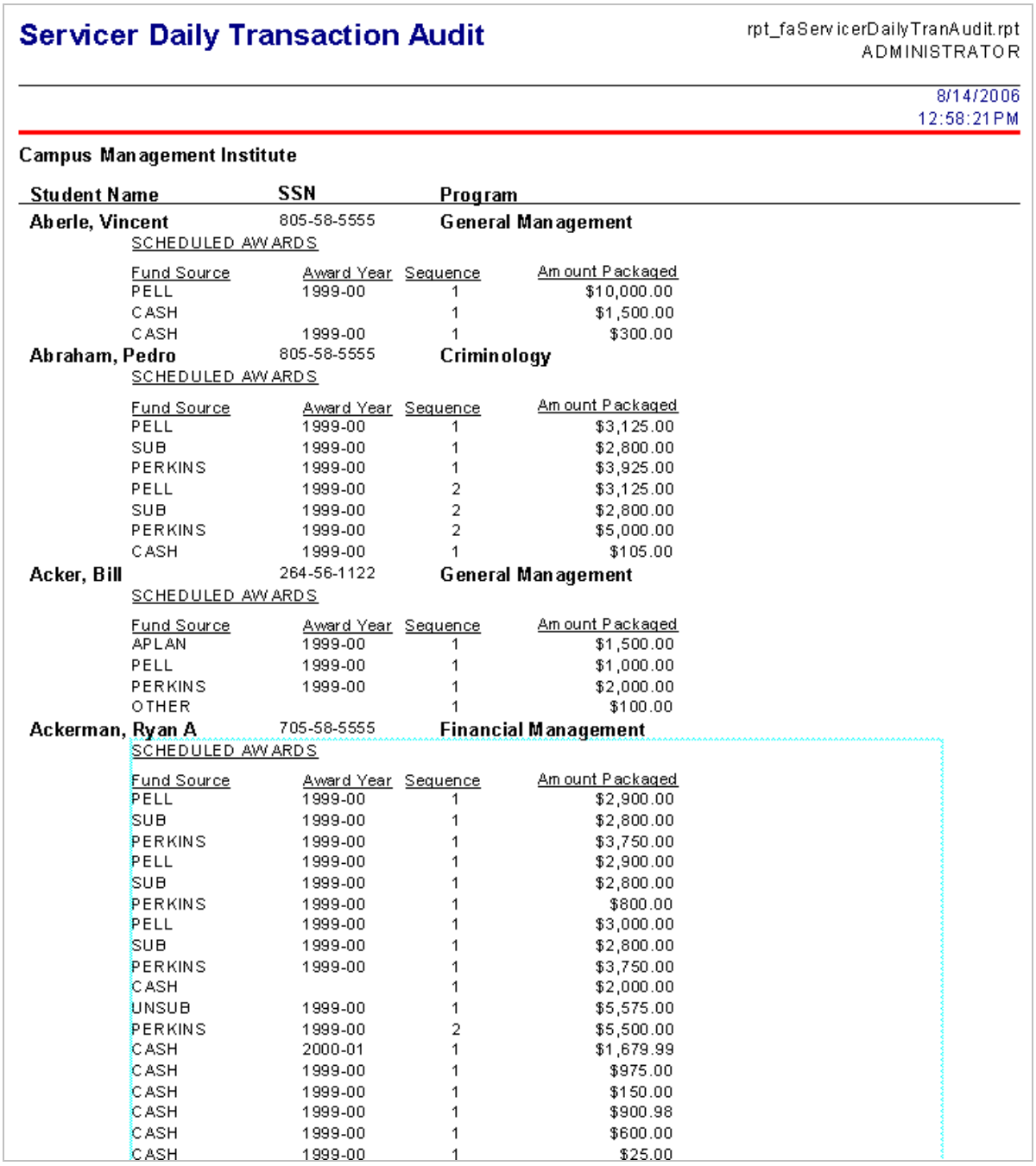
- FaStudentAid (A) – Fund Source, Award Year, AY Sequence #, Amount Packaged
- FaSched (D) – Date Scheduled, Net Amount, Term
- FaDisb (P) – Date Disb (As Date Paid), Actual Amount, Term
- FaRefund (R) – Date Due (As Due Date), Amount, Fund Source

The report will show all records added or modified by the Servicer imports. Report examples are provided for the following selections:

- Scheduled Awards and Include Change Records?
- Scheduled Disbursements and Include Change Records?
- Refund Files and Include Change Records?
- Tuition Adjustments and Include Change Records?
- R2T4 Refunds and Include Change Records?

Note: If you are enforcing batch integrity, and if a batch was broken into multiple batches, the **Scheduled Awards** and the **Scheduled Disbursement** sections of this report will display both the parent batch ID number and the batch ID number.

The report will show all records added or modified by the Servicer imports. The report example below reflects **Scheduled Awards** and **Include Change Records?** selected options.



Servicer Daily Transaction Audit

rpt_faServicerDailyTranAudit.rpt
ADMINISTRATOR

8/14/2006
12:58:21PM

Campus Management Institute

Student Name	SSN	Program
Aberle, Vincent	805-58-5555	**General Management**

SCHEDULED AWARDS

Fund Source	Award Year	Sequence	Amount Packaged
PELL	1999-00	1	$10,000.00
CASH		1	$1,500.00
CASH	1999-00	1	$300.00

Abraham, Pedro	805-58-5555	**Criminology**

SCHEDULED AWARDS

Fund Source	Award Year	Sequence	Amount Packaged
PELL	1999-00	1	$3,125.00
SUB	1999-00	1	$2,800.00
PERKINS	1999-00	1	$3,925.00
PELL	1999-00	2	$3,125.00
SUB	1999-00	2	$2,800.00
PERKINS	1999-00	2	$5,000.00
CASH	1999-00	1	$105.00

Acker, Bill	264-56-1122	**General Management**

SCHEDULED AWARDS

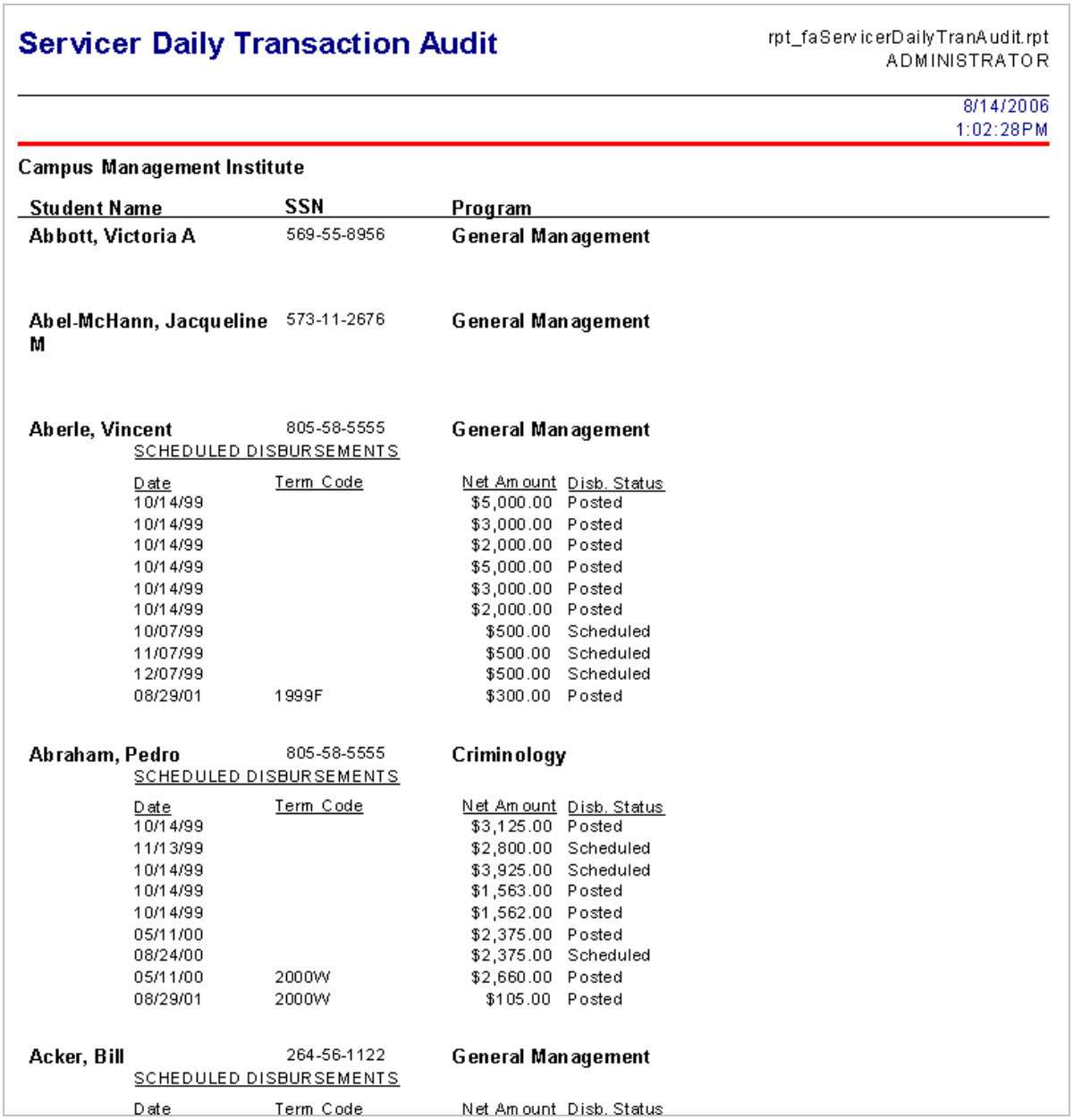
Fund Source	Award Year	Sequence	Amount Packaged
APLAN	1999-00	1	$1,500.00
PELL	1999-00	1	$1,000.00
PERKINS	1999-00	1	$2,000.00
OTHER		1	$100.00

Ackerman, Ryan A	705-58-5555	**Financial Management**

SCHEDULED AWARDS

Fund Source	Award Year	Sequence	Amount Packaged
PELL	1999-00	1	$2,900.00
SUB	1999-00	1	$2,800.00
PERKINS	1999-00	1	$3,750.00
PELL	1999-00	1	$2,900.00
SUB	1999-00	1	$2,800.00
PERKINS	1999-00	1	$800.00
PELL	1999-00	1	$3,000.00
SUB	1999-00	1	$2,800.00
PERKINS	1999-00	1	$3,750.00
CASH		1	$2,000.00
UNSUB	1999-00	1	$5,575.00
PERKINS	1999-00	2	$5,500.00
CASH	2000-01	1	$1,679.99
CASH	1999-00	1	$975.00
CASH	1999-00	1	$150.00
CASH	1999-00	1	$900.98
CASH	1999-00	1	$600.00
CASH	1999-00	1	$25.00

The report example reflects the **Schedule Disbursements** and **Include Change Records?** selected options.



Servicer Daily Transaction Audit

rpt_faServicerDailyTranAudit.rpt
ADMINISTRATOR

8/14/2006
1:02:28PM

Campus Management Institute

Student Name	SSN	Program
Abbott, Victoria A	569-55-8956	**General Management**
Abel-McHann, Jacqueline M	573-11-2676	**General Management**
Aberle, Vincent	805-58-5555	**General Management**

SCHEDULED DISBURSEMENTS

Date	Term Code	Net Amount	Disb. Status
10/14/99		$5,000.00	Posted
10/14/99		$3,000.00	Posted
10/14/99		$2,000.00	Posted
10/14/99		$5,000.00	Posted
10/14/99		$3,000.00	Posted
10/14/99		$2,000.00	Posted
10/07/99		$500.00	Scheduled
11/07/99		$500.00	Scheduled
12/07/99		$500.00	Scheduled
08/29/01	1999F	$300.00	Posted

Abraham, Pedro	805-58-5555	**Criminology**

SCHEDULED DISBURSEMENTS

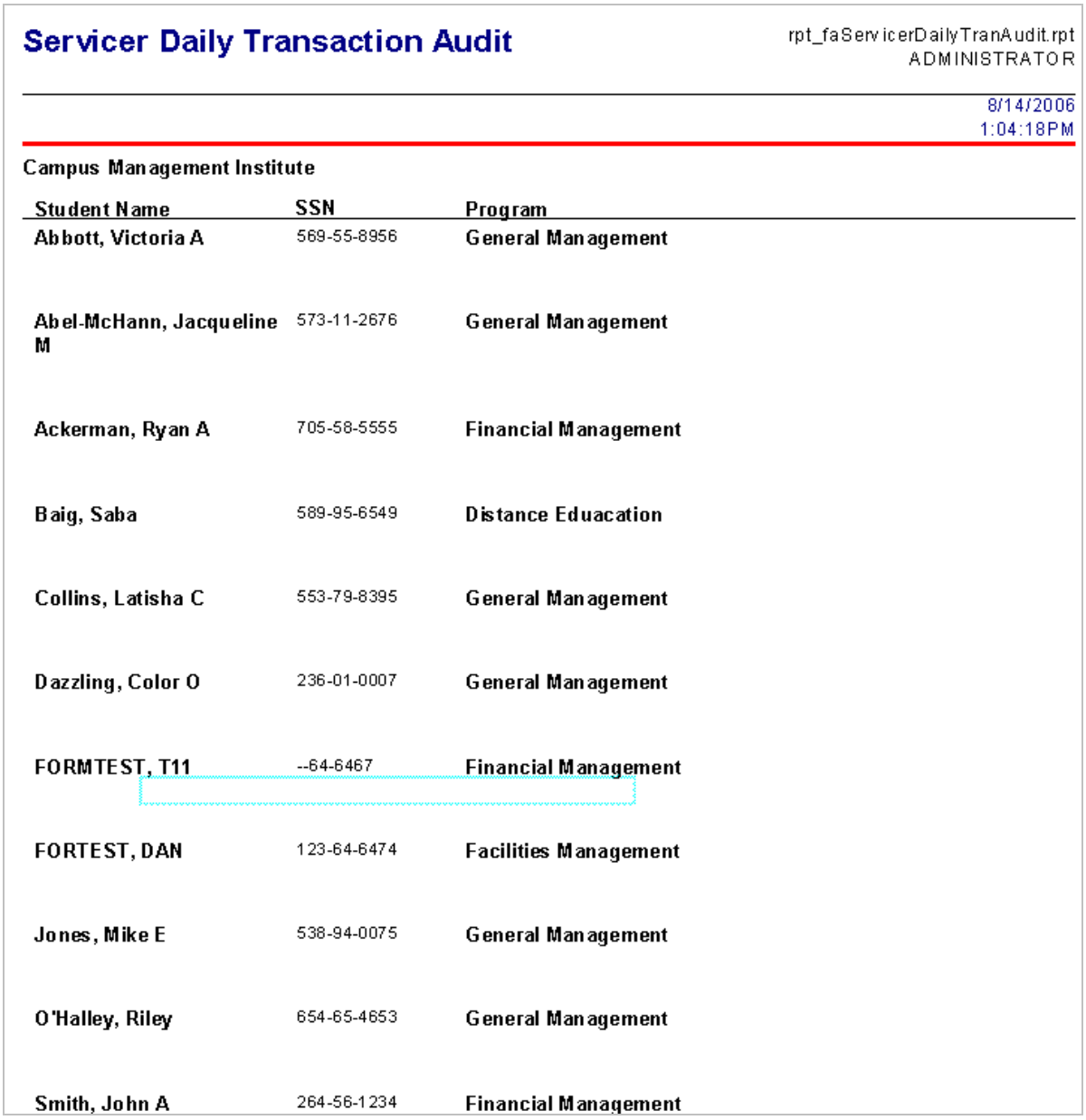
Date	Term Code	Net Amount	Disb. Status
10/14/99		$3,125.00	Posted
11/13/99		$2,800.00	Scheduled
10/14/99		$3,925.00	Scheduled
10/14/99		$1,563.00	Posted
10/14/99		$1,562.00	Posted
05/11/00		$2,375.00	Posted
08/24/00		$2,375.00	Scheduled
05/11/00	2000W	$2,660.00	Posted
08/29/01	2000W	$105.00	Posted

Acker, Bill	264-56-1122	**General Management**

SCHEDULED DISBURSEMENTS

Date	Term Code	Net Amount	Disb. Status

The report example reflects the **Refund Files** and **Include Change Records?** selected options.



Servicer Daily Transaction Audit

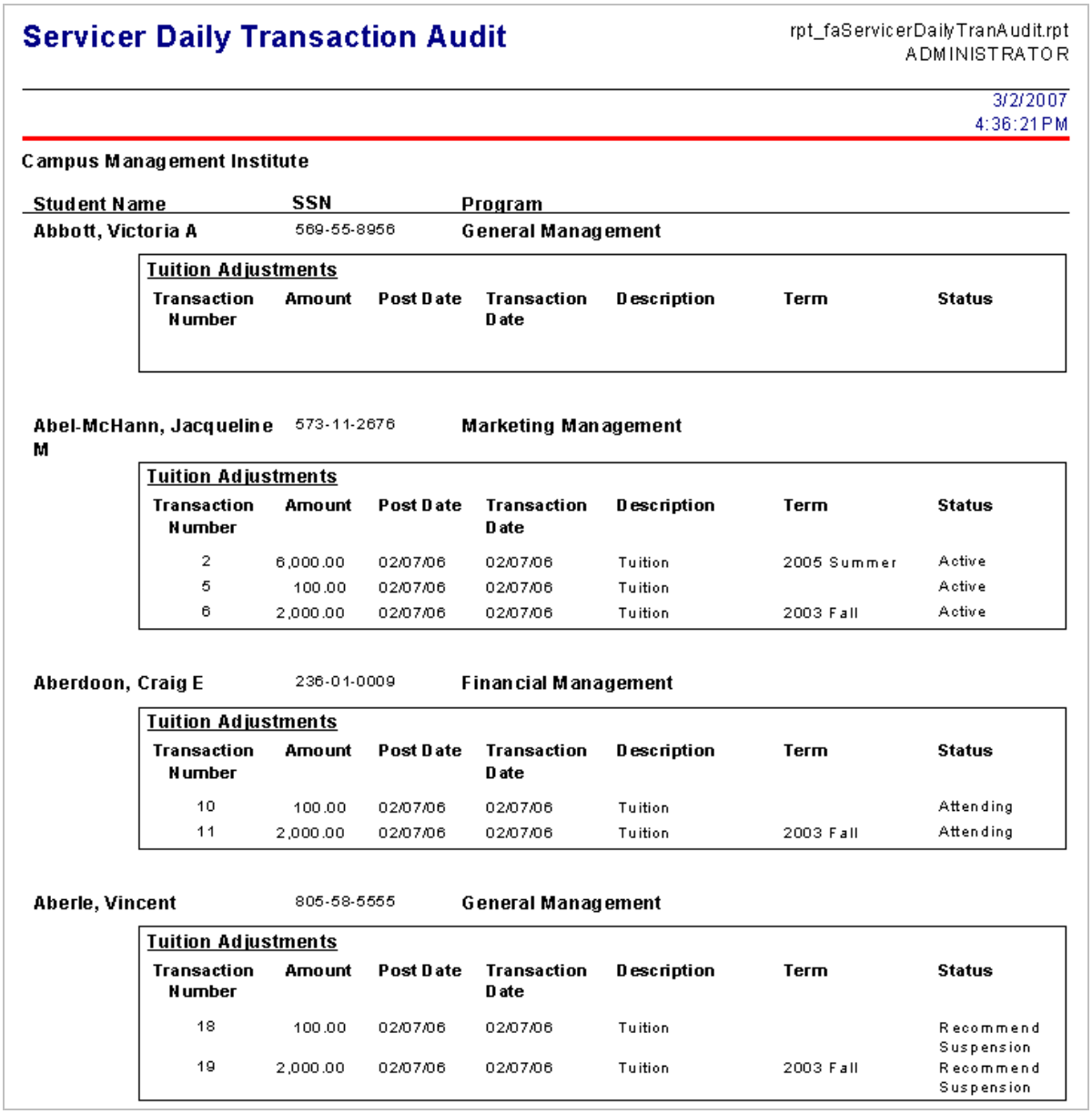
rpt_faServicerDailyTranAudit.rpt
ADMINISTRATOR

8/14/2006
1:04:18PM

Campus Management Institute

Student Name	SSN	Program
Abbott, Victoria A	569-55-8956	General Management
Abel-McHann, Jacqueline M	573-11-2676	General Management
Ackerman, Ryan A	705-58-5555	Financial Management
Baig, Saba	589-95-6549	Distance Eduacation
Collins, Latisha C	553-79-8395	General Management
Dazzling, Color O	236-01-0007	General Management
FORMTEST, T11	--64-6467	Financial Management
FORTEST, DAN	123-64-6474	Facilities Management
Jones, Mike E	538-94-0075	General Management
O'Halley, Riley	654-65-4653	General Management
Smith, John A	264-56-1234	Financial Management

The report example reflects the **Tuition Adjustments** and **Include Change Records?** selected options.



Servicer Daily Transaction Audit

rpt_faServicerDailyTranAudit.rpt
ADMINISTRATOR

3/2/2007
4:36:21 PM

Campus Management Institute

Abbott, Victoria A 569-55-8956 **General Management**

Tuition Adjustments

Transaction Number	Amount	Post Date	Transaction Date	Description	Term	Status

Abel-McHann, Jacqueline M 573-11-2676 **Marketing Management**

Tuition Adjustments

Transaction Number	Amount	Post Date	Transaction Date	Description	Term	Status
2	6,000.00	02/07/06	02/07/06	Tuition	2005 Summer	Active
5	100.00	02/07/06	02/07/06	Tuition		Active
6	2,000.00	02/07/06	02/07/06	Tuition	2003 Fall	Active

Aberdoon, Craig E 236-01-0009 **Financial Management**

Tuition Adjustments

Transaction Number	Amount	Post Date	Transaction Date	Description	Term	Status
10	100.00	02/07/06	02/07/06	Tuition		Attending
11	2,000.00	02/07/06	02/07/06	Tuition	2003 Fall	Attending

Aberle, Vincent 805-58-5555 **General Management**

Tuition Adjustments

Transaction Number	Amount	Post Date	Transaction Date	Description	Term	Status
18	100.00	02/07/06	02/07/06	Tuition		Recommend Suspension
19	2,000.00	02/07/06	02/07/06	Tuition	2003 Fall	Recommend Suspension

This report example reflects **R2T4 Refunds** and **Include Change Records?** selected options.

Servicer Daily Transaction Audit

rpt_faServicerDailyTranAudit.rpt
ADMINISTRATOR

3/2/2007
4:40:48PM

Campus Management Institute

Student Name	SSN	Program
Abbott, Victoria A	569-55-8956	General Management

R2T4 Refunds

Fund Source	Amount	Date Due	Description	Refund Status	Term	Status

Student Name	SSN	Program
Abel-McHann, Jacqueline M	573-11-2676	Marketing Management

R2T4 Refunds

Fund Source	Amount	Date Due	Description	Refund Status	Term	Status

Student Name	SSN	Program
Ackerman, Ryan A	705-58-5555	Financial Management

R2T4 Refunds

Fund Source	Amount	Date Due	Description	Refund Status	Term	Status

Student Name	SSN	Program
Armstrong, Robert W	094-32-7732	Financial Management

R2T4 Refunds

Fund Source	Amount	Date Due	Description	Refund Status	Term	Status

Student Name	SSN	Program
Baig, Saba	589-95-6549	Distance Eduacation

R2T4 Refunds

Fund Source	Amount	Date Due	Description	Refund Status	Term	Status

Servicer Disbursement Batch Review

With the Servicer Disbursement Batch Review you can find all open disbursement batches created by a servicer import of actual disbursements. These batches will NOT be available through the standard Approve to Pay form. You can *not* edit the amount, dates, or number of disbursements in a batch sent by a servicer.

Batches created by a servicer import are available to view in summary and print a report of the **accepted** disbursements only. Disbursements not accepted on import are held in the Exception File until resolved. Batches viewed in this area may or may not be ready to post (as indicated on-screen). If a batch is not ready to post, the batch has exceptions that must be resolved. When exceptions are found, a message will appear on the screen and on the report printed from this form to indicate that the exceptions are still not resolved.

Once all exceptions are resolved, the disbursement batch indicates that it is OK to post. The batch is available to post.

This reporting option starts with a **Disbursement Batch Review** form showing a list of batches available for review. The columns include Disb Batch #, Date Created, UserID, # Disbursements, Batch Amount, and Import BatchID (from FaDisbBatch).

- **Disb batch #** – FaDisbBatch.FaDisbBatchID.
- **Date Created** – FaDisbBatch.DateAdded.
- **UserID** – FaDisbBatch.UserID.
- **# Disb** – FaDisbBatch.NumDisb.
- **Batch Amount** – FaDisbBatch.BatchAmount.
- **Import BatchID** – FaDisbBatch.FaBatchExpImpID.
- **# Exceptions?**
- **OK To Post?** – Yes if # Exceptions is equal to zero. Otherwise, no.

The program shows only batches where the Import File code is "S – Servicer", the batch is still open, and the user has access to the campus**. Print** and **Close** Buttons are included on the form. The layout of the report is the same as the **FA Disbursement Batch Tracking Report**.

When the number of exceptions is greater than zero, a comment is added to the top of the report to display the message: "Exceptions are on file for batch selected. Exceptions must be resolved prior to posting this batch."

Note: This message can be displayed only when the report is called from this form and the number of exceptions is greater than zero. This report is generically called from the reports menu and the Approve Disbursement Batch option in Daily > Financial Aid. This message does not appear when run from either of these areas.

Exception Review

CampusNexus Student immediately imports the servicer's financial aid data when files reach the school's server. When the data is imported, a notification is sent to the Financial Aid and Student Accounts administrators identified in Servicer Configuration (**Setup > Campus Locations > Financial Aid > Servicer Configuration**). The notification includes the total number of accepted records in the batch and the number of exceptions found.

If data fails to import, the records are held in the FA Servicer Exception table. You will use the Exception Review forms to resolve the exceptions.

Note: The Exception Review procedures are expected to be performed daily, so that data in CampusNexus Student remains recent and accurate for the processing of future imports.

Files Imported from Global - You will not receive a DA file without a corresponding MA file.

File Descriptions

File	Description
CLFAFAID	Identifier File
MA	Scheduled Awards (Each MA file is accompanied by a DA file.)
BR	Budget File
SD	Document Tracking
DA	Scheduled Disbursements
PA	Paid Disbursements
CA	Change File
RE	Refund File
AR	Tuition Adjustments
AP	R2T4 Refunds

Identifier Match

CLFAFAID Import

The purpose of the identifier match is to synchronize the aid on file in CampusNexus Student with the aid on file at your servicer. CampusNexus Student imports each record from your servicer and attempts to find the student based on his or her Social Security number (SSN) within the campus identified in the import file. Once the student is found, it searches for the student's enrollment using the Start Date and Graduation Date from the import file.

Next, CampusNexus Student attempts to find the aid record. Using the Award Year, Amount (amount will always have a $1.00 tolerance), Fund Source, and Loan Period Start Date provided by your servicer, CampusNexus Student looks for an exact match on file. If no match is found, CampusNexus Student searches again for an exact match on all elements, allowing a thirty day discrepancy on the Loan Period Start Date. If no match is found on this attempt, one final attempt is made on an exact match for all data elements with the exception of the Award Year. If no match is found on this final attempt, a record is written to the exception file.

When a match is identified, it updates the unique Servicer Record ID to the data in CampusNexus Student so that future data elements imported for this scheduled aid will be associated with the record found. The amounts are never overwritten on an identifier import, and new records are not created as a result of this import. These changes, if necessary, can be handled during exception review.

Import Matching Logic

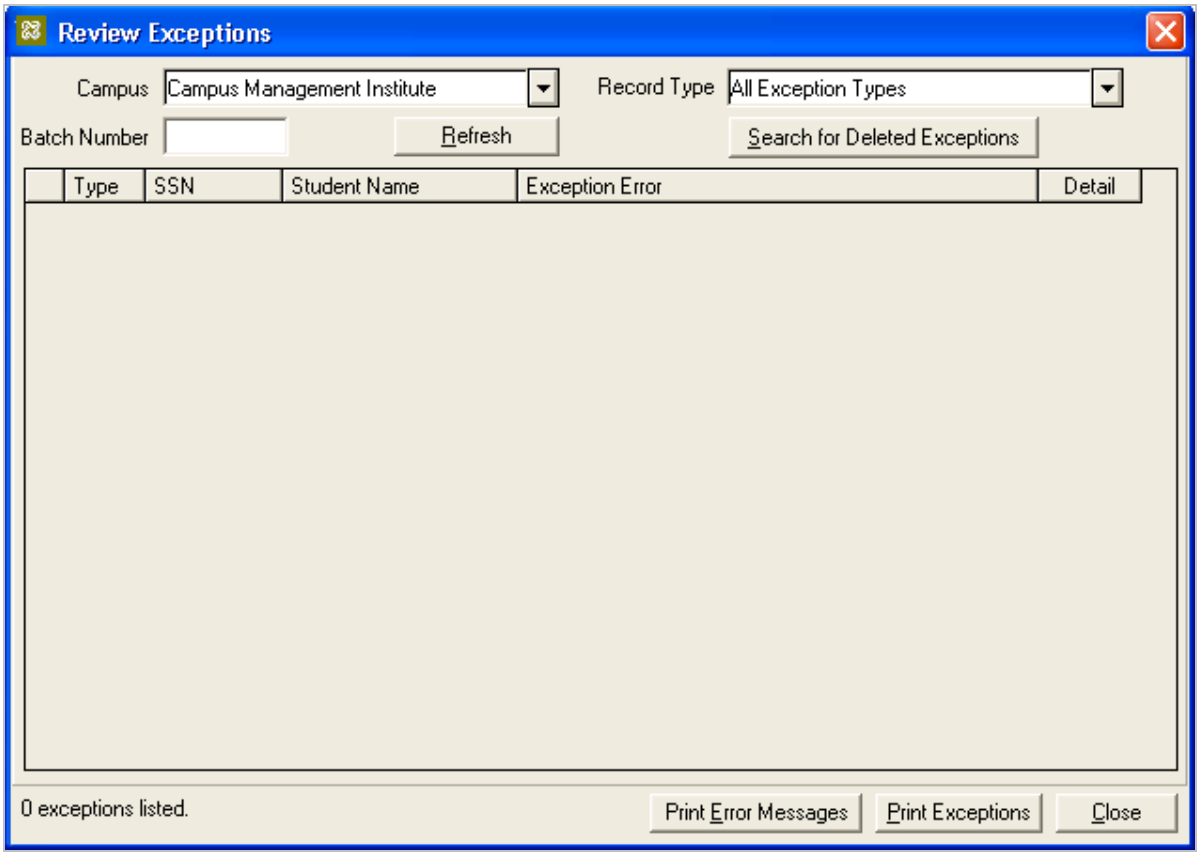
The following three tags have been added to the BR, MA, DA, PA, CA, and RE files to ensure all files coming from Global to CampusNexus Student match to the correct enrollments: Student ID, Enrollment ID, and Academic Year ID. The import matching logic will initially use the Student ID, Enrollment ID and Academic Year ID to locate the student for the BR and MA files. If no match is found, the student will attempt to be located by SSN. When processing the DA file, these fields will be used to locate Disbursement Schedules for those who are configured to Require Terms on disbursements.

When importing the SD file, the logic must be able to match the document record by first attempting to use the Student ID and Enrollment ID that was sent in the SD file. If the match is not found, then an attempt will be made to locate the document record based on SSN.

Exception Review Forms

To work with the Exception Review forms:

1. Navigate to **Daily > Financial Aid > Servicer Processing > Exception Review**.



2. Select the **Campus** and **Record Type** to be reviewed. Enter the **Batch Number** to filter the rows to list a single batch. Click **Refresh** to display the data in the grid. The form shows all records from the FaServicerException table where the reprocessed date is null.

   Note: If two users are logged in at the same time CampusNexus Student does not allow a user to view/edit details for a particular Global exception record if another user is viewing/editing the details for the same exception record. If the user attempts to view/edit details for an exception that another user already has open, CampusNexus Student notifies the user. CampusNexus Student does not allow a user to view/edit the details for a particular Global exception record if that user is already viewing/editing the details for the same exception record. Lastly, if a user

attempts to view/edit details for an exception that another users already has open, CampusNexus Student notifies the user attempting to view/edit details that the record is already in use.

3. Click **Search for Deleted Exceptions** to search by an individual student's SSN. CampusNexus Student displays a **Search** form in which you can specify an SSN and click **OK** to search.

   Exception Record Types

   - A - Scheduled Award Exceptions
   - B - Budget Exceptions
   - D - Scheduled Disbursement Exceptions
   - P - Paid Disbursement Exceptions
   - R - Refund Exceptions
   - C - Change Record Exceptions
   - M - Identifier Import Exceptions
   - S - Document Tracking
   - T - Tuition Adjustments
   - F - R2T4 Refunds

4. A table of Exception Error Codes is provided in a related Help topic, or in the form of a report that you can print by clicking **Print Error Messages**. From the error description on the grid, look up the cause and resolution recommendations in the table. Follow the recommendations in the help table to resolve each exception. This may involve changing one or more of the data elements listed on the Resolve Exception form.

5. Click the **Detail** button on each row. CampusNexus Student loads the **Resolve Exception** form (frmFaServicerResolve) and provides resolution data. Depending on the error code, the resolution options will vary. The **Field Name** column contains data elements that are pertinent to the selected exception and the **Value** column contains the data coming from the servicer. One or more of these data elements disagrees with the data in the CampusNexus Student database.

6. Click **FA Packaging** to open the selected student's packaging data. If your security profile allows changes to Title IV fund sources, make any necessary changes to match the packaging data to the data on the Resolve Exception form. After making the changes, click **Resolve** to see if you have solved the exception. If not, look for other discrepancies.

7. Click **Select Aid** to pick a financial aid record to which the Servicer Record ID can be applied. If you then click Resolve, CampusNexus Student will update the Servicer Record ID and retain the amounts already in the database. The Select Aid button will not appear on the form for some types of exceptions where the aid or academic year could not be determined. This can be done regardless of the Title IV change flag. (The example form is altered to conceal sensitive data.)

8. Click **Clear** to remove the selected exception record from the Global batch.

   This is a radical, dangerous action. This action implies that you are sure your CampusNexus Student data is correct and that the Global data is incorrect. You need to resolve the issue directly with Global and convince them to send you corrected data.

9. Click **Resolve** to call a procedure that attempts to repost the data.

   - If it succeeds, CampusNexus Student displays a message, "*Exception Reprocessed*", and updates the Reprocessed Date of the record in the FA Servicer Exception table.
   - If it fails, CampusNexus Student displays the message "*Failed to Reprocess (shows the new error code)*". The failure adds a new row to the FA Servicer Exception table and updates the Reprocessed Date of the

original exception record. Refreshing the list of exceptions will display the new error.

If the Resolve procedure fails, CampusNexus Student prompts you for the required missing data elements. Changes to the data on this form are stored in FaServicerException.CorrectedXML. The Reprocessed Date will be populated on the original record indicating the exception is "closed". This process continues until the exception is resolved.

10. Click **Close** to close the form.

The following change codes may appear in CA records imported from Global.

C - Change Disbursement Date/Amount

D - Delete Scheduled Disbursement

N - Add New Disbursement

X - Delete All Scheduled Disbursements for Aid

Note: Once you click the **Search for Deleted Exceptions** button the form for entering the Social Security Number (SSN) displays.

After the search, you can view the detail of a deleted exception in the same way that you currently view the detail of an unresolved exception. You can Clear the exception at this point. Clearing the exception would once again make it available to resolve using the current resolve exceptions process. You can clear any exception (CLFAID, MA, DA, CA, RE, PA) with one exception: You would not be able to clear a payment (PA) exception if it is part of a posted Financial Aid disbursement batch. This safeguard is necessary to protect the integrity of the batch. CampusNexus Student does not allow new batch detail records to be added to a posted batch. You can get back to the list of exceptions to resolve for all students by clicking the **List Deleted Exceptions** button that set the form back to the No deleted exceptions state.

Exception Review Reports

Error Code Report: Prints a list of all error codes and descriptions from FaServicerError.

Exception Report: Prints a list of the exceptions selected by the user. It displays the SSN, Name, Type, Error Code, and Date Added, where the Reprocessed Date is null.

Exception Error Codes

The following Exception Review error codes are used when importing financial aid data from servicers. See Exception Review for details about resolving FA import data exceptions. A current list of exception error codes can also be printed from a button on the **Daily > Financial Aid > Servicer Processing > Exception Review** form.

Error Code Descriptions

Error Code	Description	Cause/Solution
000001	Cannot Find Campus	The last 3 digits on the imported file (see batch history report) are not found in Setup > Campus Locations > Servicer Configuration > File Extension Identifier. This code is provided by your servicer. Once this data is populated, use the Resolve feature to process the file.
000002	Cannot Find Student	This error will occur when CampusNexus Student cannot locate the student by his/her Social Security Number or SYStudentID. The student is unable to be located by SSN/SYStudentID or is not enrolled on the matching campus of the file. Tor resolve this error you can: 1. Add the student record and enroll the student into the appropriate program on the matching campus; 2. Update the SSN in the exception details so that it matches the appropriate student in CampusNexus Student; 3. Update the SSN for the appropriate student so that it matches the SSN in the exception details; 4. Contact Global to send you a corrected record for the correct campus the student is attending for that enrollment.
000003	Servicer Fund Source Code Not Found in CampusNexus Student	The fund source code on the aid record is not found in CampusNexus Student. Your servicer defines a fund source code for each fund source. This code should be entered in the Fund Source Code form under the appropriate CampusNexus Student Fund Source code to map the servicer codes. Verify the code is set up correctly in CampusNexus Student and use the Resolve option to process the record.
000004	Cannot find Financial Aid Record for enrollment.	When importing an identifier record from your servicer, CampusNexus Student first checks if the student is already scheduled for the fund source, award year, gross amount and loan period dates (if relevant). CampusNexus Student is looking for an exact match on all data elements when the award is in an "Approve" status. Since the record is on file with your servicer, you need to associate the data with an existing record. Use the options to override and match to an existing record. The match is on fund source, award year, and enrollment academic year when the status is "Estimated".

Error Code	Description	Cause/Solution
000005	Aid Type Not supported for Servicer Import	The fund source code on the record is mapped an aid type that is not supported by the CampusNexus Student import logic. CampusNexus Student supports Title IV aid types only.
000006	Cannot Delete Disbursement, Disbursement is already Paid in CampusNexus Student.	Your servicer has sent a change record to delete a disbursement where the date and amount equals a disbursement on file for the fund source, but the disbursement is already in a paid status. If the disbursement was paid in error, a correction would need to be made to remove the disbursement from the ledger card. Otherwise, your servicer should send a negative disbursement instead of a change record. Change records can only affect scheduled disbursements.
000007	Cannot Find Academic Year.	The data sent by your servicer includes the start date for the students Academic Year or budget period. On import, CampusNexus Student locates the academic year record within the students enrollment by matching this date to the Academic Year start date in CampusNexus Student. The start date must be within 30 days of the date sent by the servicer. You will receive this message when an Academic Year does not exist for the students enrollment where the start date meets the 30 day criteria. To correct, update the start dates in CampusNexus Student to the appropriate start date, or notify your servicer that they have an incorrect budget period start date for this student.
000008	Scheduled Disbursement not found. Cannot add Actual Disbursement.	The actual disbursement file looks for a scheduled disbursement in CampusNexus Student for the fund source identified where the scheduled amount is equal to the amount sent in the actual disbursement file and the status of the disbursement is "Scheduled". These should always match since your servicer processes amount changes in a change file prior to submitting the actual payment record. If it does not match, changes to the scheduled disbursement record in CampusNexus Student to match the imported record will allow you to resolve the payment. Note: All payments must be resolved to post an actual payment batch.
000009	Cannot Update Disbursement, Scheduled Disbursement not found.	Your servicer has sent a change record to change a disbursement date or amount. CampusNexus Student is looking for a scheduled disbursement where the date scheduled and scheduled amount equals the original disbursement date and original disbursement amount included in the change file. A change to a scheduled disbursement in CampusNexus Student to match the original data elements provided by the servicer will allow the resolve function to complete.

Error Code	Description	Cause/Solution
000010	Cannot Remove Scheduled Aid, at least one disbursement has been paid.	Your servicer has sent a change record to delete an entire award and its associated disbursements. The aid can not be deleted because at least one disbursement was paid. If the disbursement was paid in error, a correction would need to be made to remove the disbursement from the ledger card. Otherwise, your servicer should send a negative disbursement instead of a change record. Change records can only affect aid when the disbursements are in a scheduled status.
000011	Aid Record is already on file and status is not "estimated".	When importing a new scheduled award record from your servicer, CampusNexus Student first checks if the student is already scheduled for the fund source, award year, gross amount, and loan period dates (if relevant). CampusNexus Student is looking for an exact match on all data elements. If a record is found, and the status is Estimated, CampusNexus Student will update the existing record with the servicer record ID and amount packaged. If the aid is in an approved status, the record will fall into the exception file to require a user to approve and override the match. Since the record is on file with your servicer, you need to associate the data with an existing record. Select an option to override and match the Servicer Record ID to an existing record, or if no payments are made, remove the scheduled award from CampusNexus Student and then post the resolution.
000012	School Code Not Found.	The last 3 digits on the file name imported (see batch history report) are not found in Setup > Campus Locations > Servicer Configuration > File Extension Identifier. This code is provided by your servicer. Once this data is populated, use the Resolve feature to process the file.
000013	Invalid Action Code.	Each file imported from a servicer is assigned an action code which identifies the file type. The action code assigned to this file is unknown. This may be caused by an invalid file name, or a file type that is not supported by CampusNexus Student. Please contact Support (1-800-483-9106).
000014	XML improperly formatted: No School Info tag found.	The XML imported to CampusNexus Student is not recognizable. Please contact Support (1-800-483-9106).
000015	XML improperly formatted: More than one School Info tag found.	The XML imported to CampusNexus Student is not recognizable. Please contact Support (1-800-483-9106).
000016	Disbursement is already scheduled. Duplicate Date and Amount.	Your servicer has sent a scheduled disbursement for a date and amount for the identified fund source that is already on file. If the record in CampusNexus Student is identical and was added manually, you can choose the option clear the disbursements. You may also choose to remove the scheduled disbursement in CampusNexus Student and post the resolution.

Error Code	Description	Cause/Solution
000017	Cannot Add Refund, Student Aid Record not found.	Your servicer has sent a negative disbursement record with a servicer record identifier that is not found in the scheduled aid file. It is possible that a previous exception is on file for this student that caused the record to not be updated. Confirm that all exceptions are resolved. If this issue is still not resolved, you may need to re-import an identifier file (year to date match file from your servicer). Please contact Support (1-800-483-9106).
000018	Servicer (Global) - Budget Period Start Date (positions 15-20) is not a valid date.	The servicer record identifier contains the start date of the students budget period (or academic year). This date is in an invalid format. Contact your servicer and request a new record with an accurate date for this student.
000019	Servicer Record ID not found in Student Aid Table.	A disbursement record was imported with a Servicer Record ID that is not found in the student aid file. It is possible that a previous exception is on file for this student that caused the record to not be updated. Confirm that all exceptions are resolved. If this issue will still not resolve, you may need to re-import an identifier file (year-to-date match file from your servicer). Please contact Support (1-800-483-9106).
000020	Terms are required for disbursements. Term could not be determined from servicer data.	Terms are required on all scheduled disbursement records in CampusNexus Student. A scheduled disbursement was imported from your servicer for which the appropriate term could not be determined. CampusNexus Student matches disbursement date, fund source, and academic year start date from the disbursement import file to a disbursement schedule in CampusNexus Student. Verify that a disbursement schedule exists in CampusNexus Student in which the academic year start date range matches the student's, the fund source matches, and the disbursement date matches.
000021	Servicer Record ID already on file and disbursements have been paid.	This error will result when you import a scheduled aid file (C2MA) for a record where the Servicer Record ID is already on file, and at least one disbursement has been paid. CampusNexus Student will update the amounts on the award if no disbursements are paid. However, to maintain the total disbursements equal to the total award, once a disbursement is in a paid status, the amount packaged will not be updated on import. If a change to the amount is necessary, change the data in CampusNexus Student and use the resolve option to post this entry.

Error Code	Description	Cause/Solution
000022	Disbursement on file for same date, but with a different amount	This error occurs when CampusNexus Student locates a disbursement it believes is a correct match, but the amount in CampusNexus Student is not the same as the amount in the exception details. To resolve this exception, you can: (1) Edit the amount through Financial Aid Packaging so that it matches the amount in the exception details; (2) Edit the amount in the exception details so that it matches the amount in Financial Aid Packaging; or (3) Contact Global to send you a corrected record.
000023	Disbursement already on file in same month. Cannot add disbursement	This error occurs when CampusNexus Student locates a disbursement it believes is a correct match, but the date in CampusNexus Student is not the same as the date in the exception details. To resolve this exception, you can: (1) Edit the date through Financial Aid Packaging so that it matches the date in the exception details; (2) Edit the date in the exception details so that it matches the date in Financial Aid Packaging; or (3) Contact Global to send you a corrected record.
000024	SSN not found for Document	This error will occur when CampusNexus Student cannot locate the student to update their document tracking with the information in the exception details. To resolve this error, you can: (1) Add the student record and enroll the student into the appropriate program; (2) Update the SSN in the exception details so that it matches the appropriate student in CampusNexus Student; (3) Update the SSN for the appropriate student so that it matches the SSN in the exception details; or (4) Contact Global to send you a corrected record.
000025	Document Mapping not found for Campus	This error will occur when CampusNexus Student cannot locate the Global document in the Servicer Configuration Document Mapping grid. To resolve this error: (1) Update the mapping for the document identified in the exception details; or (2) Contact your system administrator to update the configuration for you.

Error Code	Description	Cause/Solution
000027	The student identifier for this student does not exist in the database. Please contact your System Administrator for assistance with resolving this exception.	This exception will occur when the record being imported does not include enough information to locate the student. Look for one of the following conditions in the exception details: 1. The SchoolAcademicID field is 0 and the SSN field is blank. - OR - 2. The SchoolAcademicID field is not 0, but no student exists in the campus where studentID matches SchoolAcademicID. Steps to resolve: If the record meets condition #1, try to locate the student. If the student exists, update the SSN field in the exception details and attempt to resolve the exception again. If you cannot find the student, ask Global to send correct and resend the record. If Global resends the record, you will need to delete this exception when you receive the replacement record from Global. Identifier information cannot be added to student records directly from the CampusNexus Student interface, so records meeting condition #2 must be resolved with system administrator assistance. Your system administrator can contact Support (1-800-483-9106) for instructions on updating the record; or you can ask Global to correct and resend the record. If Global resends the record, you will need to delete this exception when you receive the replacement record from Global.

Error Code	Description	Cause/Solution
000028	The enrollment identifier for this student does not exist in the database. Please contact your system administrator for assistance with resolving this exception.	This exception will occur when the student is located, but the record being imported does not include enough information to identify the enrollment. Look for one of the following conditions in the exception details: 1. The EnrollmentID field is 0 and no enrollments exist for the student. - OR - 2. The EnrollmentID field is not 0, but the system cannot find an enrollment that matches the information in the EnrollmentID field. Steps to resolve: Identifier information cannot be added to enrollment records directly from the CampusNexus Student interface, so records with this exception error must be resolved with system administrator assistance. Your system administrator can contact Support (1-800-483-9106) for instructions on updating the record; or you can ask Global to correct and resend the record. If Global resends the record, you will need to delete this exception when you receive the replacement record from Global.

Error Code	Description	Cause/Solution
000029	The academic year identifier for this student does not exist in the database. Please contact your system administrator for assistance with resolving this exception.	This exception will occur when the academic year cannot be located. Look for one of the following conditions in the exception details: 1. The Academic_YR_ID field is not 0, but the system cannot find an academic year that matches the information in the Academic_YR_ID field. - OR - 2. Academic_YR_ID field is 0 and the BudgetPeriodStartDate field does not fall within the start and end dates of any academic year record for the student. - OR - 3. Academic_YR_ID field is 0 and the FundYear field does not match AwardYear1 or AwardYear2 on any of the academic year records for the student. Steps to resolve: Identifier information cannot be added to student records directly from the CampusNexus Student interface, so records meeting condition #1 must be resolved with system administrator assistance. Your system administrator can contact Support (1-800-483-9106) for instructions on updating the record; or you can ask Global to correct and resend the record. If Global resends the record, you will need to delete this exception when you receive the replacement record from Global. If the record meets condition #2 or #3, you can resolve the exception by making one of the following changes: A. Update the BudgetPeriodStartDate field so that it falls within the start and end date of the appropriate academic year record for the student. B. Update the FundYear field so that it matches AwardYear1 or AwardYear2 of the appropriate academic year record for the student.
000030	The financial aid award identifier for this student does not exist in the database. Please contact your system administrator for assistance with resolving this exception.	This exception will occur when the award record cannot be located in the academic year for the student. Steps to Resolve: Create the missing award.

Error Code	Description	Cause/Solution
000031	Terms are required for refund/tuition adjustment.	This exception will occur when the campus is set up to require term codes, and the system is unable to locate the term using the values in the file. 1. For the AP (Refund) file, the system looks for the most recent term (ending last) on the students Ledger Card for transactions meeting the following conditions: a. Transaction is a payment. b. The fund source for the transaction matches the FundType field. c. The Term Start or Term End date falls between the values in the TermStartDate field and the TermEndDate field. 2. For the AR (Tuition Adjustment) file, the system looks for the most recent term (ending last) on the Ledger Card for transactions meeting the following conditions: a. The Term Start or Term End date falls between the values in the TermStartDate field and the TermEndDate field. b. Source = R c. Type = C d. Code (Bill Code) = TUIT **Note**: In case point 1.c or 2.a fails, there is a tolerance of 1 month. It means, TermStartDate will be reduced by one month and TermEndDate will be increased by one month and #1.c or 2.a executed. If still system fails to find any error. This exception will occur. Steps to resolve: Adjust the values in the TermStartDate and/or TermEndDate fields on the import record so that they meet the conditions in 1.c. or 2.c. Alternatively, you can update the term code on the ledger card transactions so that they meet the same conditions.
000032	Unable to locate the original refund	This exception will occur when processing refund revisions (Withdrawalcode = WX). The OriginalAmount field for the revision does not match the amount on any ledger card transaction or refund for the fund source. Steps to Resolve: Locate the original transaction on the students ledger card. Update the OriginalAmount field so that it matches the amount of that transaction.

Error Code	Description	Cause/Solution
000033	Unable to locate the original tuition adjustment.	This exception will occur when processing tuition adjustment revisions (Withdrawalcode = WX). The OriginalAmount field for the revision does not match the amount on any ledger card transaction meeting the following conditions: a. The Term Start or Term End date falls between the values in the TermStartDate field and the TermEndDate field. b. Source = R c. Type = C d. Code (Bill Code) = TUIT Steps to Resolve: Locate the original transaction on the students ledger card. Update the fields mentioned above so that the transaction details match the exception details; or update the exception details so that they match the transaction details.
000034	Batch date in Servicer record data is less than the minimum transaction date set for the Campus	This exception will occur when the value in the GlobalBatchDate field is less than the minimum transaction date for the users default campus. The minimum transaction date is located in the Period End Dates form. Steps to Resolve: Modify the value in the GlobalBatchDate field so that it is greater than or equal to the minimum transaction date for the users default campus.
000035	Unexpected error has occurred while saving the record in database. Please contact your system administrator for assistance with resolving this exception.	This exception is rare, but occurs when a system related error has occurred. Steps to Resolve: Attempt to resolve the exception. If problem continues, contact your system administrator or Support (1-800-483-9106) for assistance.
000036	Refund Exceeds Amount Available	This exception occurs when the amount of the refund you are importing exceeds the total amount disbursed for the award year and fund source. Steps to Resolve: Contact Global to verify the amount of the refund. If the amount is incorrect, ask Global to send you a new record with correct amount. When you import the correct record from Global, delete this exception. As an alternative, Global can advise you to correct the amount in the exception details. You can then attempt to resolve the exception again.

Error Code	Description	Cause/Solution
000037	No Global Refund Policy Configured for Campus	This exception occurs when you import a Refund Calculation or Tuition Adjustment (AP or AR file). The system cannot find the refund policy assigned to the campus when creating the Global Refund Calculation. Steps to Resolve: Contact your system administrator to configure a refund policy to use with Global under the Global configuration settings for your campus.
000038	Revisions Not Allowed to Incomplete Refund Calculations	This exception will occur when you import a revision for a Global Refund, but the Global Refund Calculation is not posted. Revisions cannot be processed against incomplete refund calculations. Global may have sent this revision in error, may not have sent the original calculation to you, or an exception for the original calculation may have been deleted. Steps to Resolve: Delete the exception if it was sent in error. If Global is sending you the original calculation, you must import the original calculation prior to resolving this exception again. If you find that an exception for the original calculation was deleted, restore it, and resolve it prior to resolving this exception again. Note: When Global sends an original amount of zero (0), for Refund Revisions "zero drop" records are not sent, therefore the system *cannot* locate the original transaction for that Refund Revision. This only affects the C2AP files. Additionally, since a refund of zero (0) *cannot* be posted for a refund through the CampusNexus Student interface, the exception can never be resolved. Therefore, CampusNexus Student will not search or attempt to void/delete the original refund, when importing the AP file. Instead, the system will just create the new refund. In addition, when additions/updates against the refund calculation table, for 'WX' records with zero (0) original amounts, the record will be inserted, not updated.
000039	Document is Award Year Specific and the Award Year has not Been Supplied.	This document is configured as an Award Year Specific document in CampusNexus Student, yet no award year has been provided by the servicer. Steps to Resolve: Verify whether the CampusNexus Student document should be award year specific. If not, update the configuration and the record will match. If so, contact your servicer and have them resend the record to you with an award year. If Global resends the record, you will need to delete this exception when you receive the replacement record from Global.

Paid Disbursement Validation

With the Perform Paid Disbursement Validation form you can highlight a disbursement batch and then click **Refund Criteria** to run the Disbursement Approval process. The approval process uses the criteria that you set up for the fund source (**Lists > Financial Aid > Fund Source >** select a fund **> Disb Approval Criteria**). Once the approval process is finished, those disbursements that failed are displayed.

To work with the Paid Disbursement Validation forms:

1. Navigate to **Daily** > **Financial Aid** > **Servicer Processing > Paid Disbursement Validation**.
2. Highlight a batch on the form and click **Refund Criteria**.
3. For each student that you highlight, the bottom box will explain why the disbursement failed. You can edit the Amount field, check the Refund? box, Print, and Schedule Refunds on this form.
4. When you click **Schedule Refunds**, a scheduled refund will be processed for the students that have the Refund check box selected and the batch will no longer be accessible.

FAGL Overview

Financial Aid General Ledger Definition - Authorization Levels

The Financial Aid General Ledger (FAGL) facilitates tracking of authorization levels by fund source. There are four Title IV funds, Federal Pell Grant, Federal SEOG, Federal Work Study (FWS), and Perkins Loan, to which Levels of Funding are applied. For Pell, SEOG, and FWS, the level of funding is called "authorization level". For Perkins, it is called "level of expenditure".

All authorization levels cover a financial aid year (July 1 to June 30). The authorization level controls how much an institution will package and disburse from the fund in an award year.

- For **Pell**, the authorization level is increased or decreased during the award year based on the institution's level of disbursement (RFMS Disbursements Accepted).
- For **SEOG**, the authorization level is set at the beginning of the award year based on the prior year's FISAP report. It will very rarely change during the award year.
- For **FWS**, the authorization level is set at the beginning of the award year based on the prior year's FISAP report. It will very rarely change during the award year.
- For **Perkins**, the level of expenditure is controlled by the payment activity of the students with outstanding Perkins Loans. As existing loans are paid, the funds can then be lent out to other students.

Institutions can transfer authorization from Perkins to FWS or SEOG. They can also transfer funds from FWS to SEOG.

Institutions can also transfer up to 10% of the authorization for FWS and SEOG from one award year to the next.

You can use the FAGL system in CampusNexus Student to post increases and decreases to the authorization levels.

Pell grant authorization levels are assigned to the "Reporting Pell ID". An organization can have one or many campuses assigned to the same Reporting Pell ID. The authorization comes from the Department of Education (ED) under the Reporting Pell ID. When posted to CampusNexus Student, the institution posts the amount to the Reporting Pell ID. Each campus that belongs to the Pell ID has the authorization available for packaging and disbursing funds.

SEOG, FWS, and Perkins authorization levels are assigned to the **Campus-Based Serial Number**. This is a 6-digit number that is assigned by ED. An organization can have one or many campuses assigned to the same serial number. The authorization comes from ED under the serial number. When posting to CampusNexus Student, the institution has the option of posting the entire authorization amount to the serial number, or it can split the amount and post individual amounts to each campus within the serial number.

Setting Up the FAGL

Setup > Campus Locations > Campuses > Financial Aid

There is a text box the Campus-Based Serial Number on the Financial Aid tab.

Setup > Financial Aid > General

An option on this form controls the level at which the institution will be using the FAGL system. The options are:

- Use FA G/L for Authorization Levels Only
- Use ALL FA G/L Functions

Lists > Financial Aid > Fund Source

There is a check box for the **Allow Manual Post** flag. A drop-down list box shows the FAGL Fund selections.

Lists > Financial Aid > FA G/L Funds

This tab lists the FAGL Funds from the FAGL Fund table. When you edit or add a FAGL Fund, a form is displayed to enter the information related to the fund.

Daily Processing

Daily > Student Accounts > Post Payments

The Payment Posting form only lists fund sources where the "**Allow Posting Directly to Ledger Card**" field is Yes.

Daily > Financial Aid > Enter FA G/L Transaction

This option displays a submenu with two options:

- Authorization

  A form for displaying and updating Authorization Levels for FAGL Funds is displayed when you select the Daily > Financial Aid > Enter FA G/L Transaction > Authorization menu option. The form prompts for the Financial Aid Year and Fund. It then displays the current authorization levels for each Reporting Pell ID for Pell Grants. Depending on the Authorization Type for campus-based programs, the authorization levels are displayed by Serial number or Campus for campus-based programs. You can post increases and decreases to authorization, transfers of authorization, or carry-forward > carry-back transactions. Transfers of authorization can be entered for Perkins and FWS funds. Carry-forward > back transactions can be entered for FWS and SEOG funds.

- Journal Entry

  The Journal Entry option is not available if the "Authorization Only" option is selected under Setup/Financial Aid/General. If you change this option, log off and on to see the effect of the change. Otherwise, the form for entering FAGL journal entries is available from the Daily > Financial Aid > Enter FA G/L Transaction > Journal Entry menu option.

Commitment Levels

View > Financial Aid > Packaging

Typically, the commitment level for Pell grants is set to 100 percent. For Perkins loans, SEOG, and Federal Work Study, the commitment levels may be set higher than 100 percent because some students may not accept the aid offered under these programs.

Logic is included in the packaging forms to warn the user when the amount packaged for the fund source exceeds the allowable commitment level for the fund source. The program will check the FAGL Authorization table for the amount authorized for the award year and multiply this amount by the commitment level for the fund source. If the new packaging amount will exceed the commitment level, a warning message is displayed indicating that you have exceeded the level for the year. In addition, after a student is packaged, the program will update the amount-packaged column in the FAGL Authorization table.

FAGL logic is also included in the auto-packaging methodology. The program will check the commitment level for a fund source before adding the fund source to the student's scheduled aid. If the commitment level is exceeded, a message is displayed so you know why a particular fund source was not auto-packaged. If an FAGL-controlled amount is auto-packaged, the program will update the amount-packaged column in the FAGL Authorization table.

Reports > Financial Aid

The following FAGL-related reports are available:

- Financial Aid G/L Authorization Levels
- Financial Aid G/L Chart of Accounts
- Financial Aid G/L Transaction Detail
- Financial Aid G/L Trial Balance

Initialization of FAGL

- A Default Chart of Accounts is supplied with CampusNexus Student.
- Your institution must enter the Levels of Authorization for each Fund.

Miscellaneous FAGL Codes

FAGL Fund Types

G - GAPS
P - Federal Pell Grant
S - Federal SEOG
W - Federal Work Study
K - Federal Perkins Loan
D - Direct Loan - GAPS
L - Direct Loan - Program Fund
F - FFEL
O - Other (Non-Title IV Fund)
T - Federal TEACH Grant
I - IASG

FAGL Fund Authorization Types (Distribute Authorization)

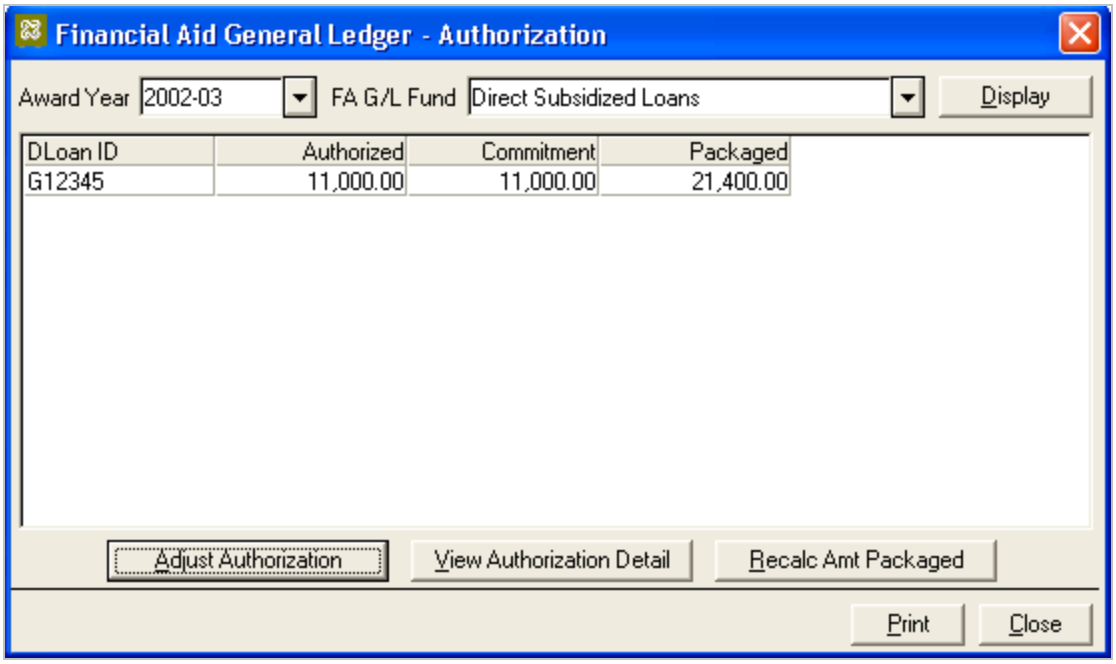
C - By Campus
D - By Direct Loan ID
S - By Serial Number

FAGL Authorization

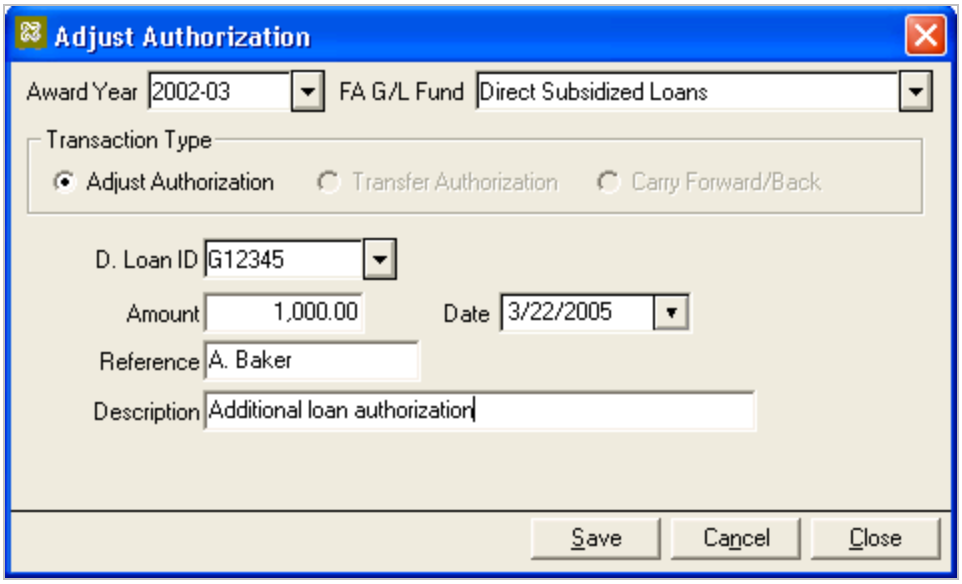
This form displays and updates Authorization Levels for Financial Aid General Ledger (FAGL) Funds. The form prompts for the Financial Aid Year and Fund. It then displays the current authorization levels for each Reporting Pell ID for Pell Grants and, depending on the Authorization Type for Campus-based programs, the authorization levels are displayed by Serial number or Campus for campus-based programs. You can then post increases and decreases to authorization, transfers of authorization, or carry-forward/carry-back transactions. The same authorization level for FA G/L funds functionality currently implemented for Pell Grants, has been extended to ACG and SMART grants. Students must be U.S. citizens and eligible for a Pell Grant to be eligible for a ACG or SMART grant.

To work with FAGL Authorizations:

1. Navigate to **Daily > Financial Aid** > **Enter FA G/L Transaction** > **Authorization**. The Financial Aid General Ledger - Authorization form is displayed.



2. Select an Award Year from the list box.
3. Select an FA G/L Fund from the list box.
4. Click **Display to** see all funds for the combination of award year and FAGL fund.

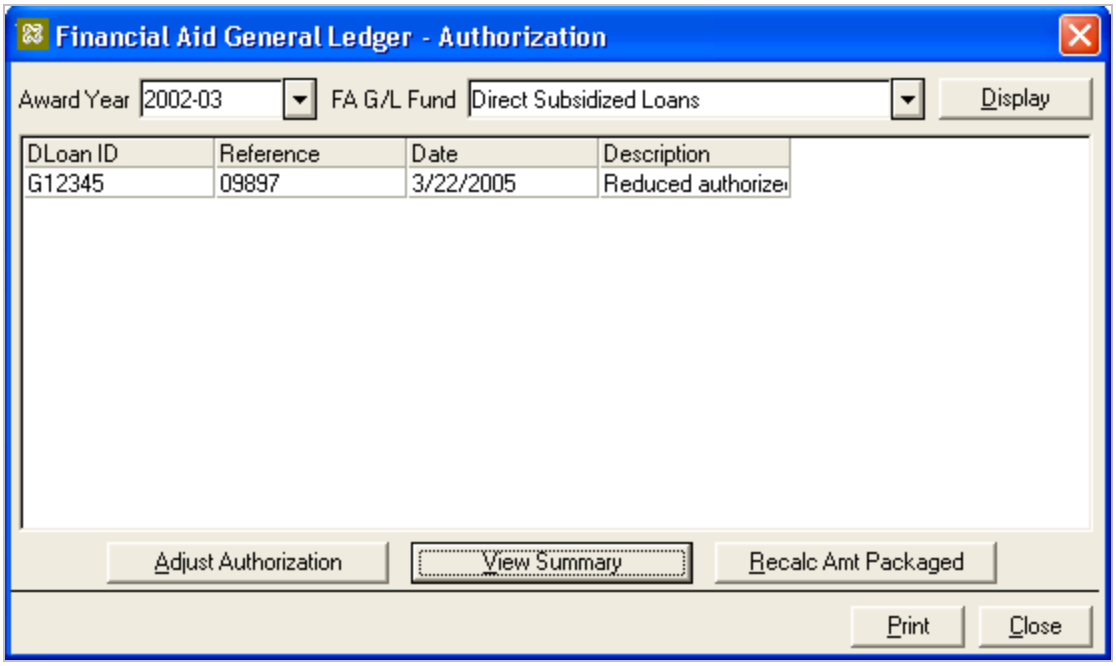


5. Select an Award Year from the list box.
6. Select an FA G/L Fund from the list box.
7. Select a **Transaction Type**. The options are:

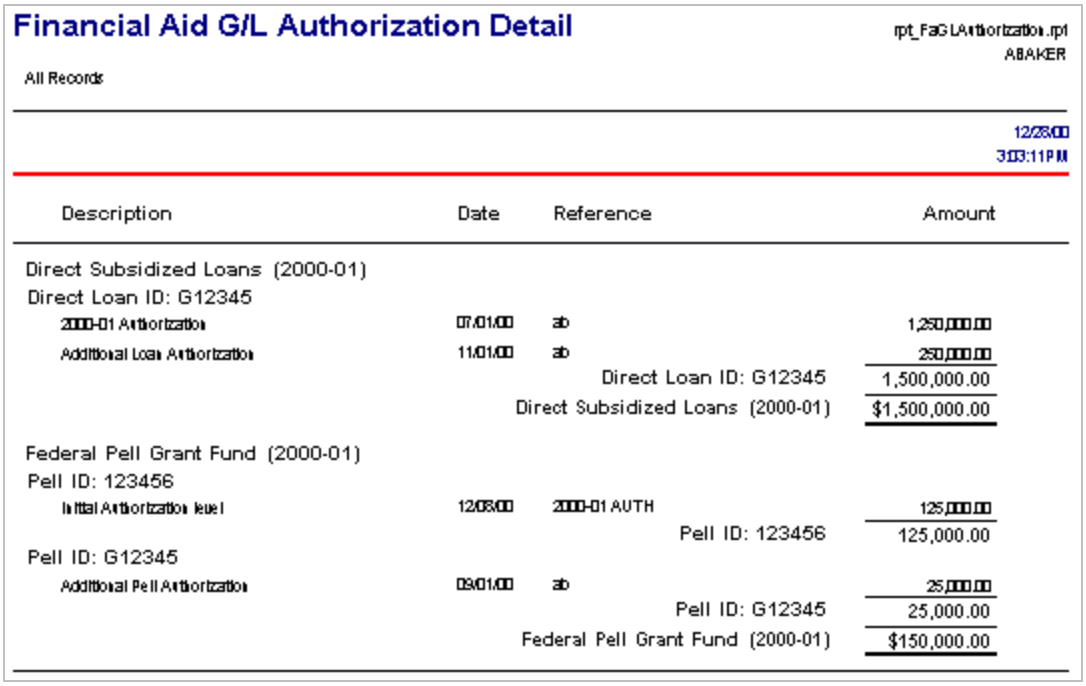
   - Transaction Types are Adjust Authorization
   - Transfer Authorization, and Carry Forward/Back

   Transfers of authorization are only allowed for Perkins and FWS funds.

   Carry-forward/back transactions are only allowed for FWS and SEOG funds.
8. Depending on the fund involved in your transaction, select the appropriate ID. In the illustrated example, it is the Direct Loan ID. The ID could be the Pell ID for Pell-related funds or an ED-assigned serial number (for Federal Work Study, for example).
9. Specify the **Amount** and **Date** of the adjustment.
10. Specify the **Reference** and **Description** for the transaction.
11. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.
12. Click **Adjust Authorization** to enter an adjustment to an authorization level. The program will display the Adjust Authorization form.
13. Click **View Authorization** Detail to see a detailed list of adjustments to the selected fund. The program will display a grid similar to the one below. The column headers may vary depending on the type of fund.



14. Click **View Summary** to return to the summary view of the form.
15. Click **Recalc Amt Packaged** to recalculate the packaged amount after making adjustments.
16. Click **Print** to print the "Financial Aid G/L Authorization Detail Report". This report lists detailed transactions affecting the selected funds. You can select one or more funds, the award year, and a transaction date range.



Financial Aid G/L Authorization Detail

rpt_FaGLAuthorization.rpt
ABAKER

All Records

12/28/00
3:03:11 PM

Description	Date	Reference	Amount
Direct Subsidized Loans (2000-01)			
Direct Loan ID: G12345			
2000-01 Authorization	07/01/00	ab	1,250,000.00
Additional Loan Authorization	11/01/00	ab	250,000.00
		Direct Loan ID: G12345	1,500,000.00
		Direct Subsidized Loans (2000-01)	$1,500,000.00
Federal Pell Grant Fund (2000-01)			
Pell ID: 123456			
Initial Authorization level	12/08/00	2000-01 AUTH	125,000.00
		Pell ID: 123456	125,000.00
Pell ID: G12345			
Additional Pell Authorization	03/01/00	ab	25,000.00
		Pell ID: G12345	25,000.00
		Federal Pell Grant Fund (2000-01)	$150,000.00

17. Click **Close** to close the form.

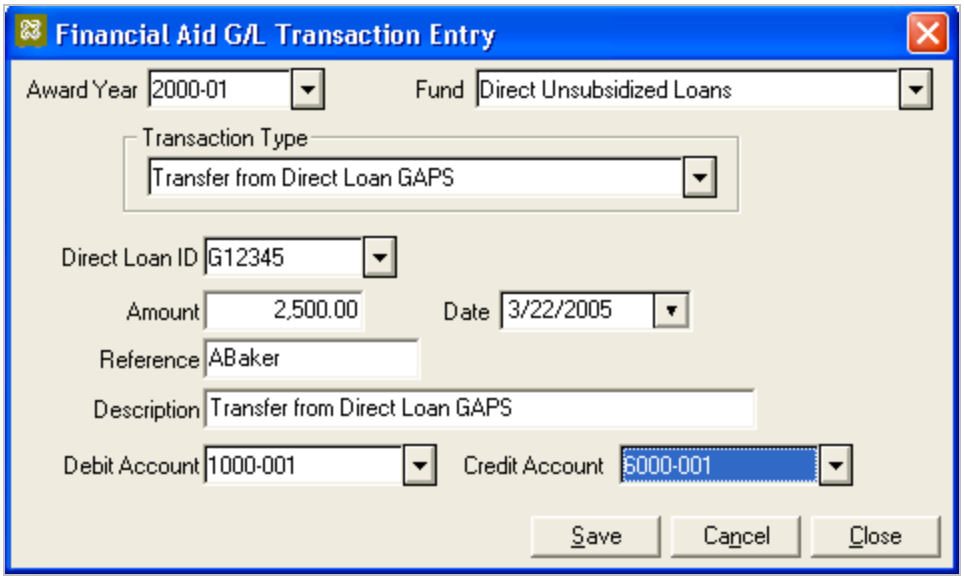
FAGL Journal Entry

Use this form to create journal entries for the CampusNexus Student Financial Aid General Ledger (FAGL) system. For more information, see FAGL Overview".

To create FAGL journal entries:

1. Navigate to **Daily** > **Financial Aid** > **Enter FA G/L Transaction** > **Journal Entry**. The Financial Aid G/L Transaction Entry form is displayed.

   The Journal Entry option is disabled if the "Authorization Only" option is selected under **Setup > Financial Aid > General**. If you change this option, log off and on to see the effect of the change.



2. Select the **Award Year** and **Fund**. Funds are set up under Lists > Financial Aid > FA G/L Funds.
3. Select the Transaction Type. The list of transaction types will vary depending on the fund you select. In the example transaction, the transaction types are:
   - Disburse to Student
   - Refund from Student Accounts
   - Transfer from Direct Loan GAPS
4. Select the ID of the fund to which the transaction applies. The label on the ID field will vary according to the fund you select. In the example transaction it is labeled **Direct Loan ID**. If the example was for a Pell Grant fund, the ID field would be Pell ID. For a Federal Work Study (FWS) fund, it would be Serial Number. Only those IDs that apply will be listed.
5. Specify the **Amount** and **Date** of the transaction.
6. Specify a **Reference** code.
7. Enter a **Description**.
8. Select the **Debit Account** and **Credit Account**. CampusNexus Student defaults these account numbers to the ones set up for the fund but you can select different accounts from the lists.

9. Click **Save**. CampusNexus Student saves the transaction and prepares the form for another entry.
10. Click **Close** to close the form.

Clear Estimated Awards

Use the Clear All Estimated Awards form to clear all remaining estimated awards for a selected award year.

Financial aid award estimates can be prepared for both prospective students (leads) and for enrolled students. Refer to View > Financial Aid > Financial Aid Estimates for more on the estimating procedure.

Some of the financial aid estimates will be converted to actual awards when students are enrolled. Estimated awards that are converted during enrollment are removed from the table of estimated awards. Those estimates that are not converted will remain in the table of estimated awards indefinitely unless they are cleared by using this procedure.

To clear all remaining estimated financial aid awards for a selected award year:

1. Navigate to **Daily** > **Financial Aid** > **Clear Estimated Awards**. The Clear All Estimated Awards form is displayed.
2. Select an **Award Year**.
3. Click **Clear**. CampusNexus Student deletes from the database all estimated Financial Aid awards for the selected award year in your session default campus.
4. Click **Close** to close the form.

Award Year Settings

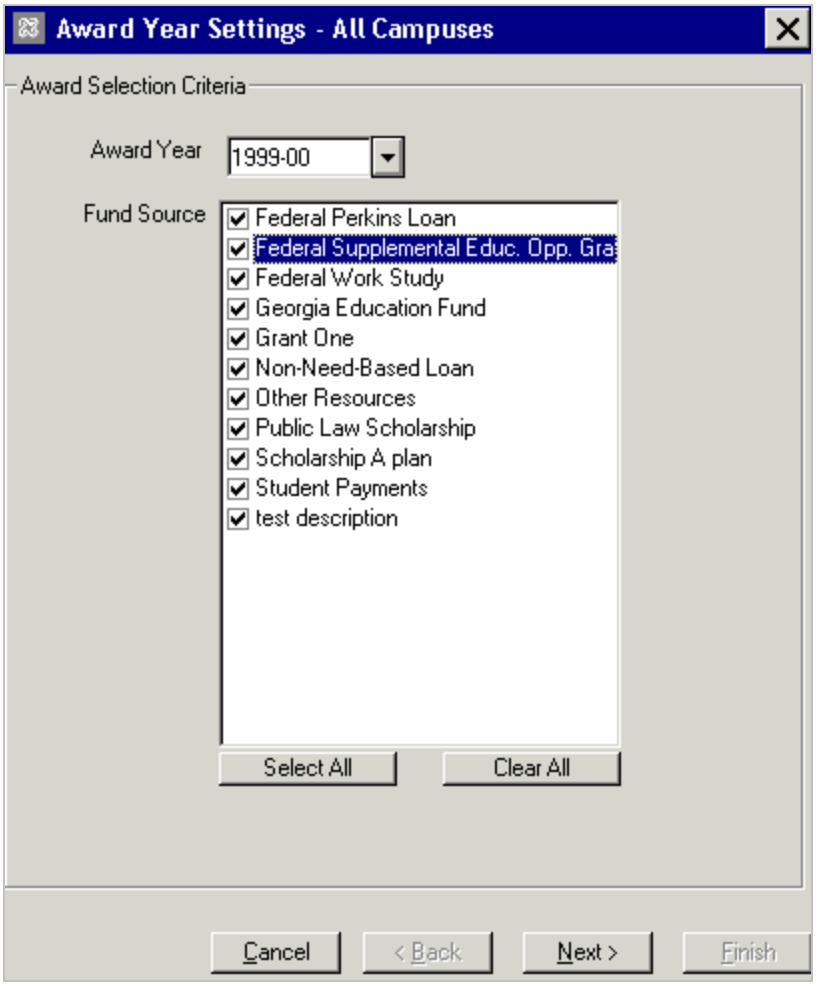
Students are packaged by the Academic Year in CampusNexus Student. Hence, the maximum award limits defined by Title IV regulations for Award Years are not taken into consideration. To prevent awarding more than one Pell grant during an award year and to designate a limit of one award per Award Year for other fund sources in the application, users can select an Award Year, select any of the fund sources normally available and set a maximum amount associated with the award.

To configure Award Year settings for individual or all campuses:

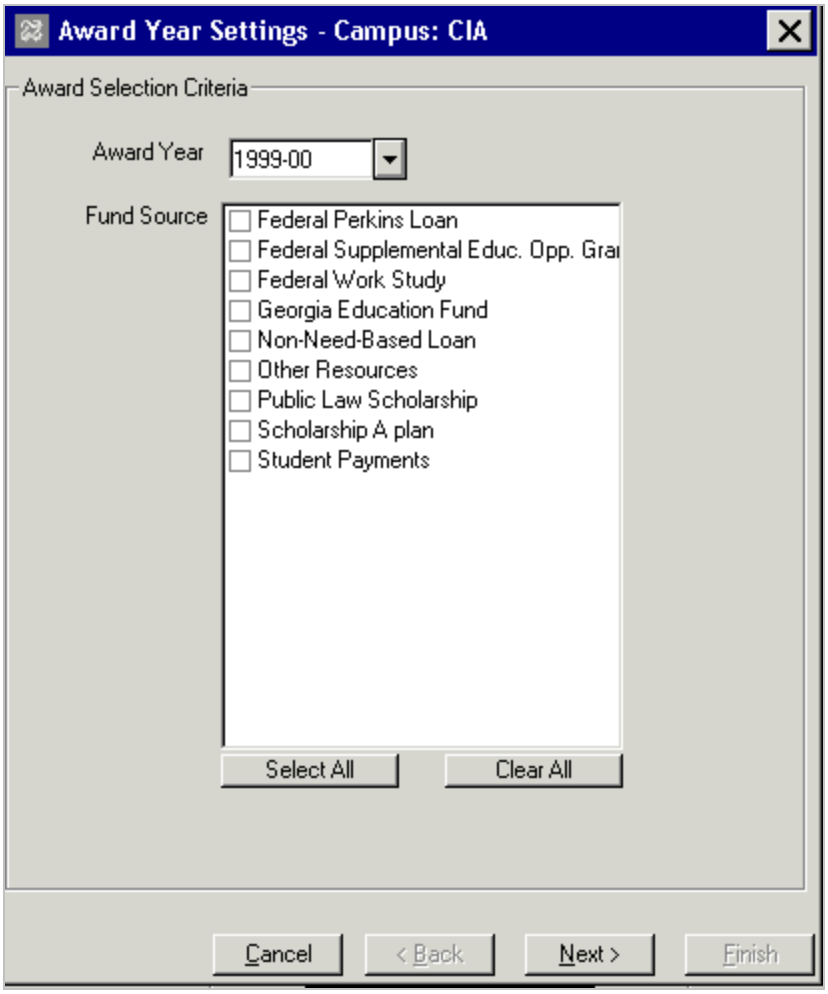
1. Navigate to the Award Year Settings form via one the following paths:
   - Setup > Financial Aid
   - Setup > Campus Locations > Financial Aid
   - View > Financial Aid > Awards > Auto-Package or Re-Package.
   - Lists > Financial Aid > Fund Source > Add/Edit > Fund Source Code Setup > Campus Configuration
2. Click **Set Award Limits** to configure each campus separately.

   The Award Year Settings form displayed on the left was accessed via the Setup > Financial Aid. The form on the right was accessed via the Setup > Campus Locations and Lists > Financial > Fund Source tab path. The fund sources are presented in a multi-select list. (Pell is not user-configurable for this enhancement, therefore the Pell fund source is excluded from this list). If you accessed the award year settings form through the Setup path, the selections made here only apply to the selected campus location.

Setup > Financial Aid



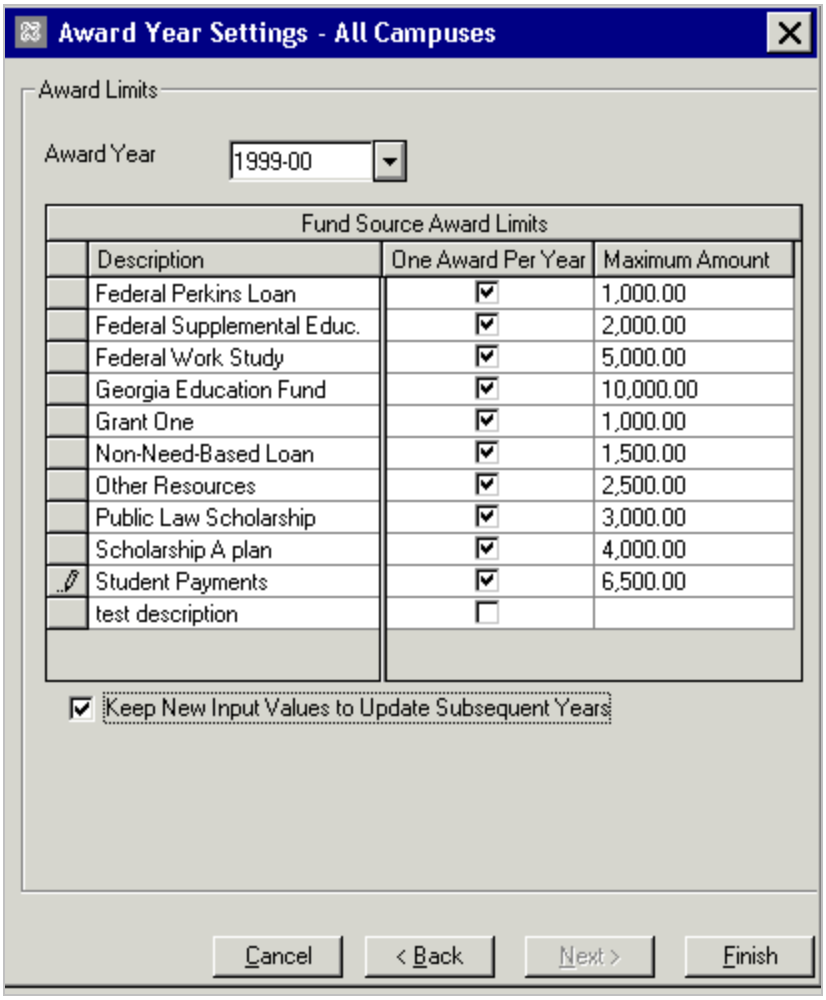
Setup > Campus Locations and Lists > Financial > Fund Source



3. Select the fund source(s). You can select sources individually or click **Select All** or **Clear All**.
4. Click **Next >**. CampusNexus Student displays the **Award Limits** form.
    a. Choose an **Award Year** from the drop-down list.
    b. Select or clear the **One Award Per Year** check boxes associated with the fund sources.

    If you indicate that only one award for a fund source for the Award Year is allowed, CampusNexus Student prevents users from adding additional awards for the fund source. Validation occurs at the student level rather than the enrollment level.

    c. Specify a **Maximum Amount** ($) for each fund source. The maximum limits are defined in the packaging method setup. If this feature is selected, it supersedes the maximum limit defined in the packaging method setup.



5. Select **Keep New Input Values to Update Subsequent Years** to apply the award year settings to subsequent award years. This makes configuration of subsequent award years easier after an initial award year has been configured. Otherwise, you need to configure award year settings for every award year.

Print Queued Award Letters in Batch Mode

Financial Aid Officers are constantly packaging students and printing award letters. Often these Officers will package a number of students during the day, but will prefer to print the letters in batch mode at the end of the day. Financial Aid Officers could be more productive if they could focus more on packaging during the work day and schedule the printing of the award letters at a later time.

Award letters printed on an individual basis may be printed from the Financial Aid Academic Year screen. You can select the award year, award letter and subsequently print the award letter as one process. The following provides you with the ability to print the award letters in a batch mode.

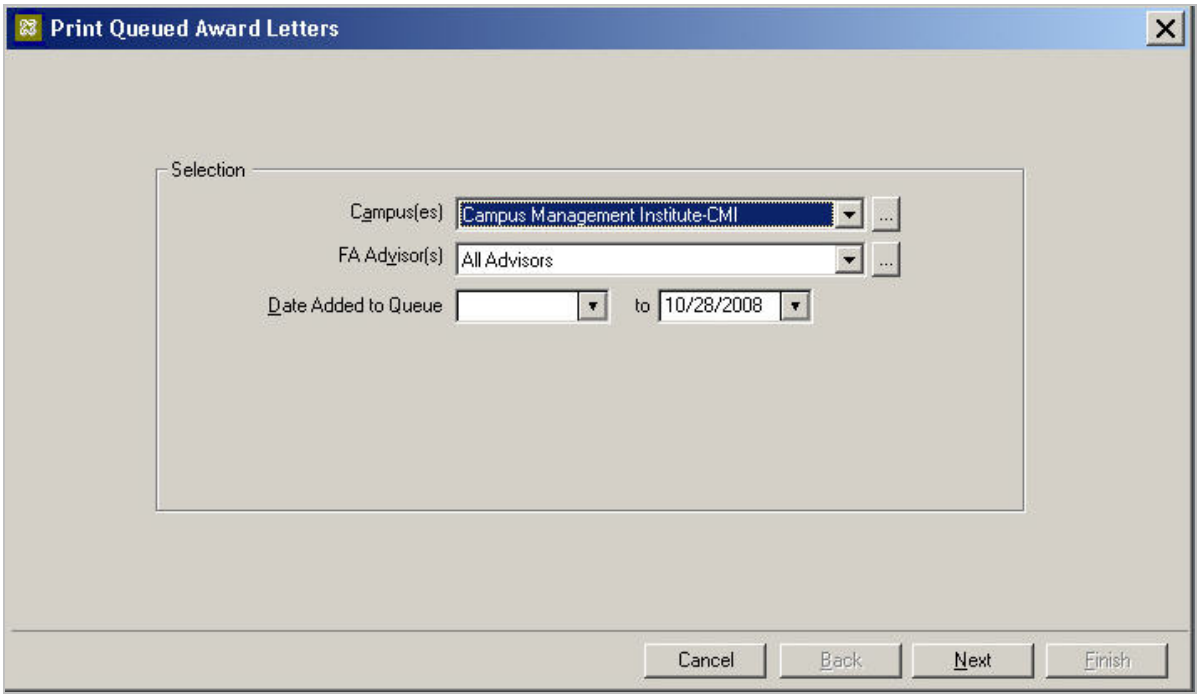
Security authorization will need to be setup for Staff Groups under the Setup > Security path. Select the "Financial Aid - Print Queued Award Letters option" from the Daily - Menu Options drop-down list and select the applicable Staff Group that will have authorization to print the award letters in a batch mode.

An option entitled "Allow Printing to Award Letter Queue" is located on the Financial Aid Settings form under the Packaging tab. Navigate to Setup > Financial Aid > Packaging tab to access this option. By selecting the check box, Financial Aid Officers can add Award Letters to a queue to be processed later or continue to print the award letters immediately.

You must have authorization to perform this task. This option will gather the queued letters, by Campus, Date Queued and Financial Aid Advisor. A list of students will appear and you can then print the award letters. The system will allow the award letters to be reprinted as needed.

To print a batch of Award Letters:

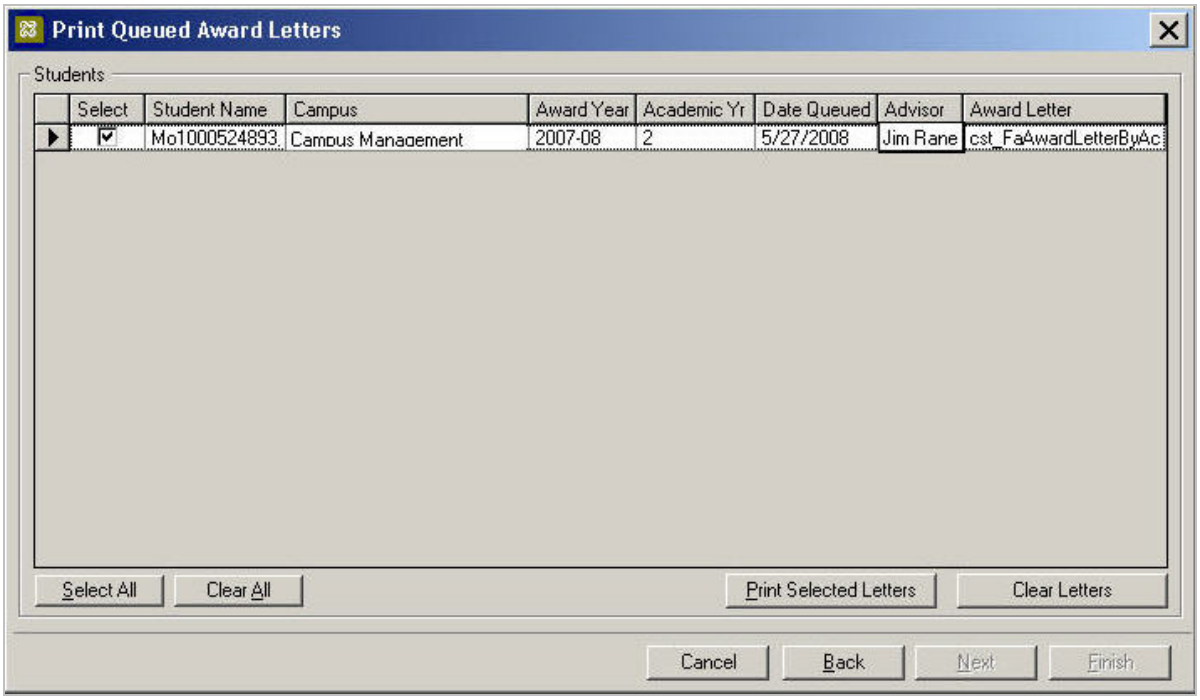
1. Navigate to **Daily** > **Financial Aid** > **Print Queued Award Letters**. The Print Queued Award Letters selection form is displayed.



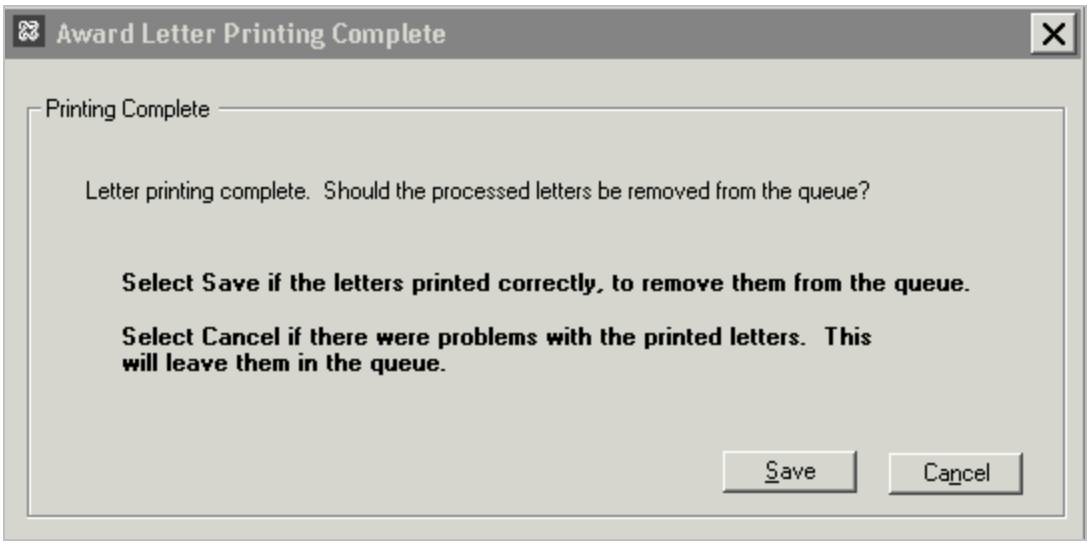
2. Select a campus from the **Campus(es)** list or multiple campuses using the ... button. CampusNexus Student displays only the campuses to which you have access.
3. Select a Financial Aid Advisor from the **FA Advisor(s)** list or multiple advisors using the

... button. **Note**: Financial Aid Advisors belonging to any of the selected campuses will be populated in this list.

4. Select start and end dates to reflect the date the award letters were added to the queue. Select a start date from the first **Date Added to Queue** list and end date from the last list.
5. Click **Next** to continue processing the batch. An informational message appears when there are no award letters queued that match the selection criteria. Click **OK** to change your selections.
6. A list of students is presented, along with the name of the campus the students are associated with. Click **Select All** to print award letters for all students listed, or click **Clear All** to not print any award letters.



7. Click **Print Selected Letters** once you have selected the student's queued award letters that you want to print.
8. Follow the instructions to remove the letters from the queue or leave them in the queue.



Note: If you click **Clear Letters** to remove all selected student's award letters from the print queue, the following message is displayed: *"OK to cancel the selected letters and remove them from the queue?"*

Click **Yes** to continue or **No** to cancel the request.

FAGL Campus Allocations

The Financial Aid General Ledger in CampusNexus Student allows users to track authorization, and create general journal entries.

Note: This topic deals with setting and monitoring allocations only. For detailed information on other aspects of FAGL Authorization, please refer to FAGL Authorization.

Institutions can input fund allocation amounts and amounts as percentages that CampusNexus Student will use to determine how much each campus can award and pay for each fund source. CampusNexus Student also tracks authorization for each of the aid fund sources; prevents users from packaging students for aid of a fund type when that fund's authorization has been expended; and provides a feature to deobligate aid.

When the aid is deobligated, the authorization for that fund source is automatically increased and available to be awarded to other students. This only applies to campus-based aid, Pell authorization is increased as Pell is requested, and schools do not receive FFEL authorization.

This feature is enabled in the General tab of the Financial Aid Setup form.

To set up campus allocations:

1. Navigate to **Daily > Financial Aid > Enter Financial Aid G/L Transaction > Authorization**.
2. In the **Financial Aid General Ledger - Authorization** form, select an Award Year and one of the following FA G/L funds:

   - Federal Perkins Fund
   - Federal SEOG Grant Fund
   - Federal Work Study Fund

   For information on **Adjust Authorization**, **View Authorization Detail** and **Recalc Amt Packaged** buttons, please refer to FAGL Authorization.
3. Click an authorization in the grid and click **Campus Allocation**. A Campus Allocation form is displayed. The heading shows the Fund Source, Award Year and Serial Number. The grid displays the campuses that comprise the school, the Code for each, the percentage of the funds the institution has allocated to this campus, and the dollar amount of funds that have already been packaged. You can specify the Allocation % column at any time. As students are awarded aid from this fund source, the awarded amount will subtracted from the campus' remaining authorization. The Packaged column will reflect these changes. The system will prevent the total amount packaged for the fund source from exceeding the campus' allocation.
4. Click the arrow in the leftmost column to select an authorization. Click **Remove Allocation** to set the percentage to 0.The total percentage of all campuses in the grid must add up to 100%. If it does not, you will be prompted to adjust the percentages.
5. When you cancel or delete a disbursement to a student in View > Financial Aid > Financial Aid Packaging, CampusNexus Student adds back the canceled disbursement amount to the campus. This amount will be available to be awarded to other students.
6. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Daily > Student Accounts

The Daily > Student Accounts menu offers options related to financial matters for the student. The options on this menu apply to the student selected from the Recent Students list.

- Document Tracking
- Post Deposits
- Registration Billing
- Process Pending Charges/Adjustments
- Post Batch Charges/Adjustments
- Generate Interest Charges
- Post FA Disbursements
- Miscellaneous Receipts
- Post Charges
- Post Payments
- Post Individual Refunds
- Post Individual Stipends
- Quick Touch POS Link >
- Transaction Search
- Student Billing Statements >
    - Student Payment Statement
    - Student Account Balance Statements
    - Student Account Activity Statements
    - Registration Bill
- Third Party/Agency Invoices
- Third Party/Agency Invoices Approve
- Bank Deposits
- Edit/Cancel Scheduled Refunds
- Process Refunds Stipends
- Void Reschedule Master Checks
- Process Electronic Drafts
- Process 1098-Ts (2007 and Prior)
- Revenue Recognition
- Reverse Revenue Recognition
- Release to General Ledger
- Undo Release to General Ledger
- Period End Dates
- Subsidiaries
- Process Tuition Discounts
- California STRF Processing
- Title IV Credit Balance
- Configure Payment Apply Order
- Manage Unapplied Credits
- Manage Attendance Posting
- <Detach> (This options detaches the submenu.)

Document Tracking

Institutions request documents from students and persons or organizations connected with the student. Use Document Tracking to keep track of the documents that are necessary for processing student records in an orderly fashion.

Document Tracking is available in the following modules:

- Admissions - AM
- Financial Aid - FA
- Student Accounts - SA
- Academic Records - AD
- Loan Management - LM
- Career Services - PL

You can use the Daily > Document Tracking feature to look at all documents of a certain type to determine the document's status for each student.

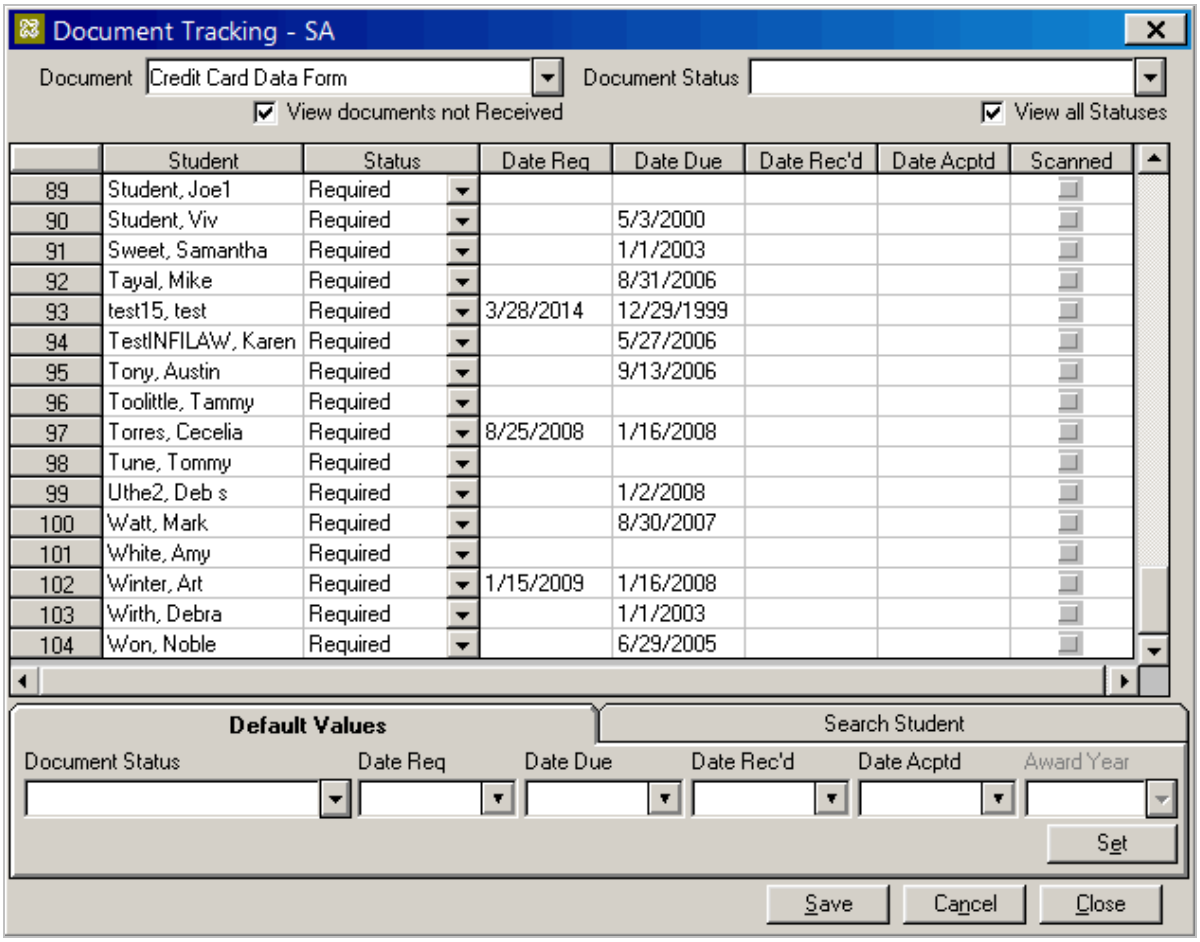
Several documents relate to academic or demographic history and your organization must have copies of them for each student. Examples are birth certificates, driver's licenses, transcripts, alien registration cards, social security cards, etc. Management policy determines which documents are important at your institution.

You can set up lists of these documents and assign them to each student record. You can then record the current status of the documents, the date you requested each document, and the date you received each document. You can also indicate that the document has been scanned into your electronic filing system.

Note: This approach differs from the Document Tracking option that you can access from the View > Contact Manager menu or Student Bar. When you access Document Tracking from the Student Bar, all documents related to a specific student as displayed. Here, you see all students related to a given document.

To edit tracking data for listed documents:

1. Navigate to **Daily > Admissions** (or other module) **> Document Tracking**. The Document Tracking form is displayed.



2. Select a **Document** from the list box at the top of the form. All students having the selected document related to their files are listed on the form.
3. Select or clear **View Documents Not Received**.
   - If the check box is selected, only those documents that have not been received are listed.
   - If the check box is cleared (default), all documents (subject to your Document Status selection) are listed.
4. For Document Tracking in Financial Aid - FA, select an **Award Year** to which the documents apply.

   Note: If you choose a Financial Aid document that does not have the "Award Year Specific" flag selected (indicating Yes) on the Document Setup, the form is displayed with the three Award Year fields disabled.
5. Select or clear **View All Statuses**.
6. Select an optional **Document Status**. If you select a document status, CampusNexus Student lists only the type of document you selected and only those that have the selected status.
7. From the displayed list, find a student document.
8. Click on a field in the row you want to update. You can update the following fields:
   - Status
   - Date Requested
   - Date Received
   - Date Due

- Date Accepted
- Scanned

Note: In date fields, you must enter the century along with the year. For example, 06/30/2000. If you just enter 99 instead of 1999, CampusNexus Student will reject it.

9. Click **Scanned**, if necessary, to indicate that you have scanned the requested document into your electronic filing system.
10. The **Default Values tab** enables you to update statuses and dates in batches.

    If you select a Status, or a Date Due, or Award year, for example, CampusNexus Student updates the values of all students whose names appear in the grid. Click **Set** to update the values and save your work.
11. The **Search Student tab** enables you to search a student using the Social Security Number (SSN) or Student ID.

    Type the SSN or ID and click **Filter**. CampusNexus Student finds the student associated with that number and displays only that student's name and information in the grid. Click **Clear Filter** to remove the filter. The grid revert to the previous display of students.
12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Post Deposits

You can review student deposits (that are not directly posted to the ledger) using the Post Deposits form. It is used to post admission and housing application fees and deposits.

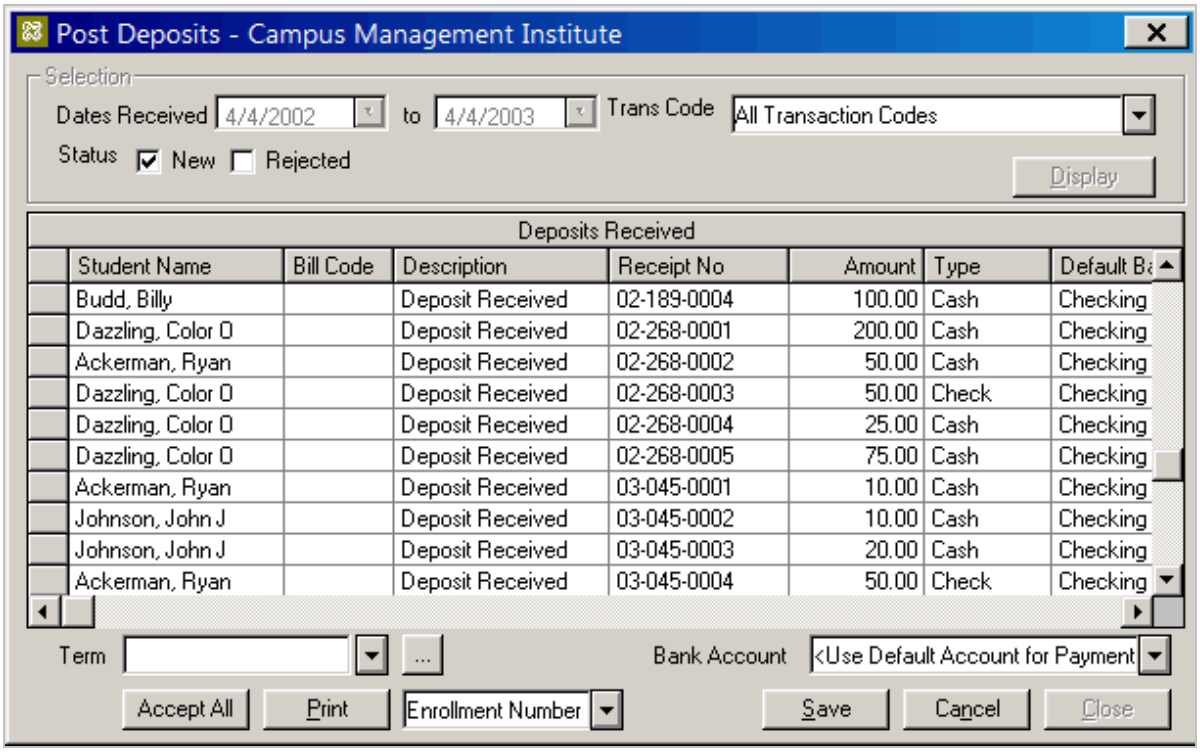
When Admissions department representatives collect deposits from students, they are held apart (in a separate file) from other financial transactions that are normally posted to ledger cards. If a deposit is to be posted as a credit to the student's ledger card and deposited in a bank account, use this procedure.

If transaction code permissions are used, only transactions that the staff member may process will appear in the **Trans Code** field.

Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

To post deposits from Admissions:

1. Select the student for whom the deposit is to be posted.
2. Navigate to **Daily** > **Student Accounts** > **Post Deposits**. The Post Deposits form is displayed.



3. Select the deposit **Status** you want to work with, **New**, **Rejected**, or both.
4. Click **Display**. The deposits are displayed in the grid.
5. Select a **Term** code for each transaction that is to be posted. You can select a term from the drop-down list that is displayed when the **Term** field is active. The term code is required only when the option in **Setup > Student Accounts > Require Term Codes** is set to **Yes**.

If **Require Term Codes** is set to **Yes**, and you want to do so, you can select a term from the (default) **Term**. If a term is selected, and you click **Save**, all deposit transactions that do not have a term selected from the grid will have the default term inserted prior to posting. If **Require Term Codes** is set to **No**, no term code will be inserted from the default term code, and if you want a term code included, you will have to manually select it for each transaction.

6. For deposits that are made by credit card, select **Post**.
7. When the **Authorized** or **Declined** box is displayed, enter the **Authorization/Declined** number.

   Note: You must select **Post** first before the **Authorize** or **Decline** boxes can be selected.
8. Click **Accept All** to accept all transactions on the list. To selectively post the transactions, check the **Post** option for the ones to be processed.
9. Select the **Bank Account** into which the funds are deposited.
10. Click **Print** to print a list of the transactions.
11. Click **Save** to post the transactions. The selected deposits are updated to the ledger card of the affected student.
12. Click **Close** to close the form.

Registration Billing

Registration Billing is the process of batch posting charges based on student registration and the billing method established by your institution. Billing Methods are set up under Lists > Student Accounts > Billing Methods. The billing method must be set up before you can select it here. You can set up billing methods based on Academic Years, Terms/Quarters, Programs/Enrollments, and Courses. Most likely, your institution uses only one or two of the methods available. The net result of the registration billing process is a distribution of charges to the students' ledger cards.

Note: The **TUIT** code must be used to bill tuition via Registration Billing. Unless an unbilled TUIT item appears in a student's Fees folder, the student will not be gathered in the list of students to bill.

To view the most recent date billed for a student navigate to View > Academic Records > Enrollment. Click the date information tab to see several important dates. If the student has never been billed, it will be indicated here. You can also see the last date billed for each enrollment by navigating to View > Financial Aid > Packaging.

Billing methods use the "By Campus" and "Transaction Code" values. The bill by Term, Academic Year, and Program billing methods use the values when looking up the costs. The "Over" column is displayed when billing by Unit. CampusNexus Student only bills the amount of "Units" over the number of "Units" specified.

Bill by Payment Period is only supported through Pending Charges review located at **Daily > Student Accounts > Process Pending Charges/Adjustments**.

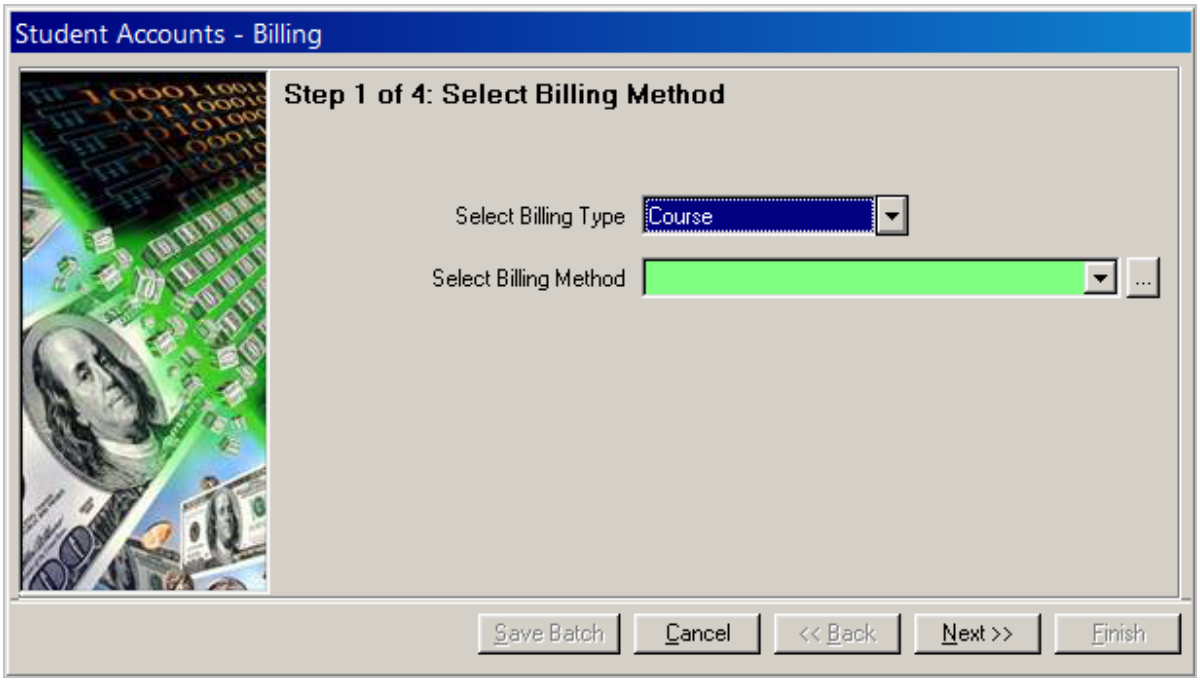
When billing methods are configured to **Payment Period**, charges calculated when registering for courses are associated with payment periods that exist in the Financial Aid module at **View > Financial Aid > Academic Year > Payment Period** (button).

Note: The end date of the course section must fall within the **Payment Period** dates to be associated with that payment period.

See also Registration Bill and Purge Billing Statement Records.

To run the Registration Billing wizard:

1. Navigate to **Daily** > **Student Accounts** > **Registration Billing**. Step 1 of the billing wizard is displayed.



2. Select the **Billing Type**. The selected billing type determines the layout of the following steps displayed by the wizard. The options are:

A. Course

When the you select Course as the Billing Type, status categories appear in Step 2, allowing you to gather only students who satisfy the status category criteria specified.

B. Term

Billing by Term bills only for the course being taken at the campus being billed. If a student takes courses at two campuses for the same term, the student will be billed for each campus separately when the billing method is run for each campus. Any additional fees (see View > Academic Records > Fees) are billed only when the enrollment is billed for the campus that matches the enrollment campus.

C. Academic Year

This feature requires the some setup. The program version must be defined correctly. The program version needs to be edited under Lists > Academic Records > Programs, Lists > Financial Aid > Programs, and Lists > Student Accounts > Programs.

Billing by Academic Year is based solely on the Student Academic Years table (`FaStudentAY`). If a institution is clock-hour based (Lists > Financial Aid > Programs > Academic Calendar = "Clock Hours"), billing will be based on the number of clock-hours attempted.

- **Example**: If a student enrolls in a 2300 clock-hour program and the academic years for the program are defined as 900 hours, 900 hours and 500 hours. The billing method prompts for a "number of hours range" to bill students. If you say "bill all students within 100 hours of starting the next academic year", a student in the 2300-hour program would be billed if:

    a. The student just started the first academic year and has never been billed before.
    b. The student has completed at least 800 hours and hasn't been billed for the second academic year yet.
    c. The student has completed at least 1700 hours and hasn't been billed for the third academic year yet.

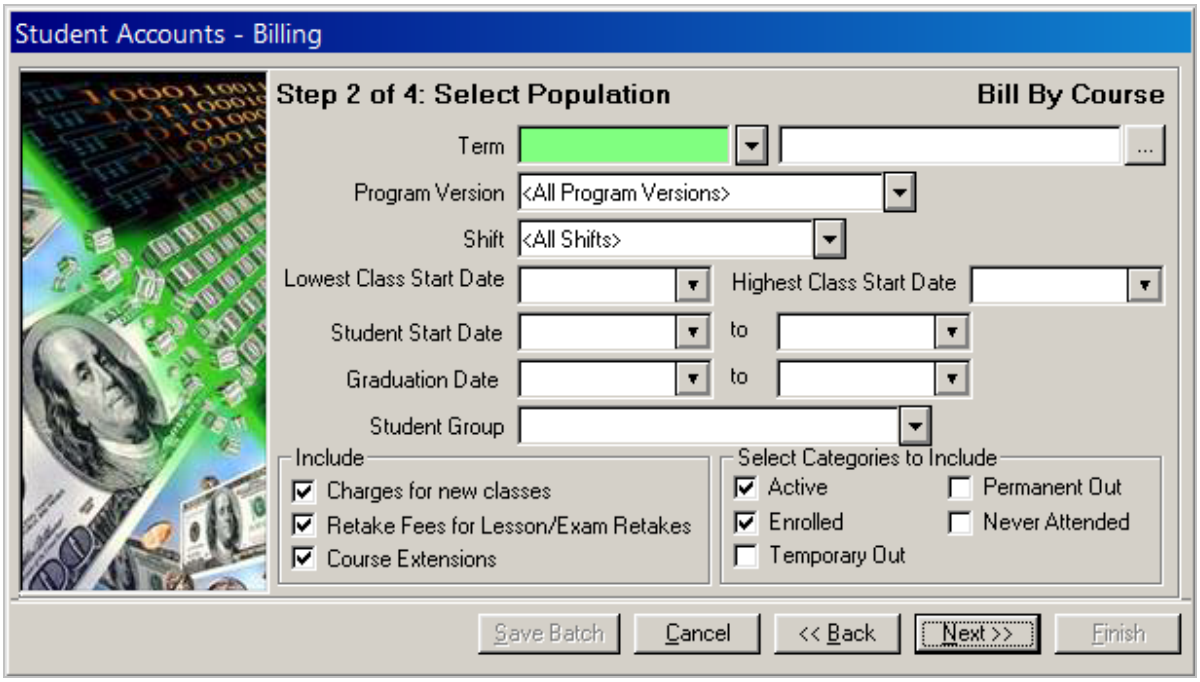
The amount to be billed is set up under Lists > Student Accounts > Billing Methods.

- When billing by academic year, the costs can be set by "Using a Rate Schedule" on the billing method, or on the Fee Schedule for the Program. The fee schedule for the program has been modified so that you can indicate to which academic year the fee belongs. If the academic year is left at zero (0), the fee will be billed every time that Registration Billing is run (provided the "one-time" option is not selected). If using a rate schedule, the student will be billed the current rate at the time that the billing takes place. If the costs are set up under the program version, the costs are established at the time of enrollment and are associated with the enrollment. Changing the costs will not affect current enrollments.

D. Program/Enrollment

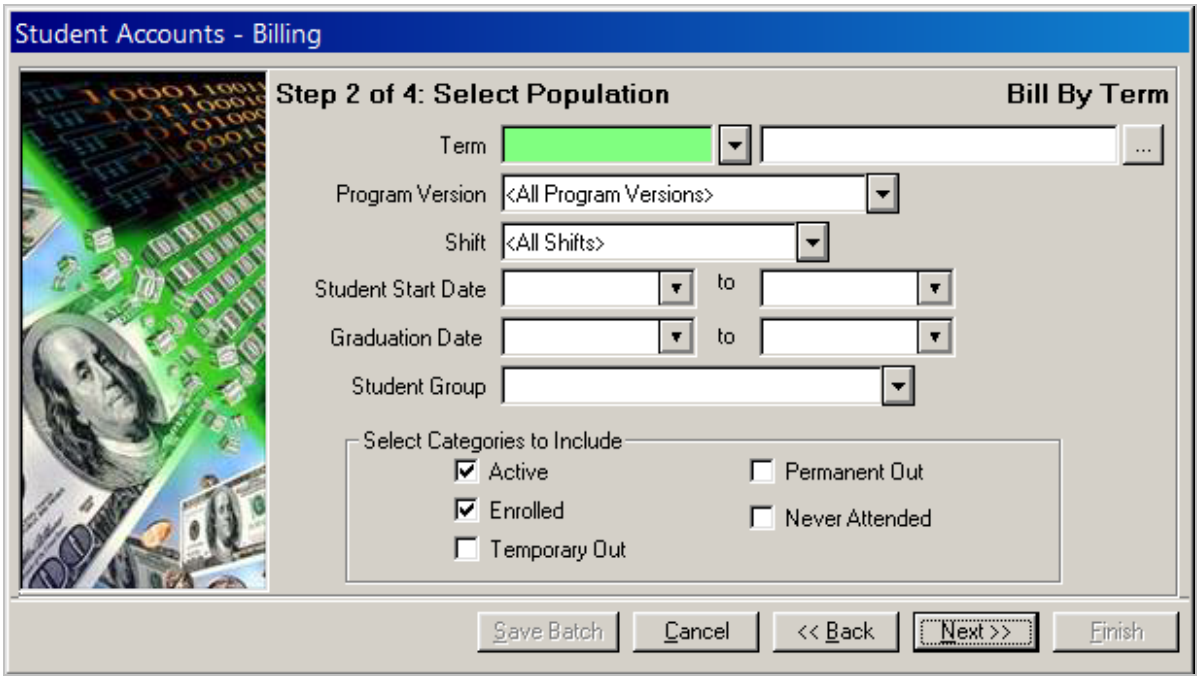
3. Select the **Billing Method**. Use the drop-down list or click to select a Billing Method.
4. Click **Next** to continue to Step 2 of the billing wizard.

A. If you selected **Bill by Course**, Step 2 is displayed as follows:



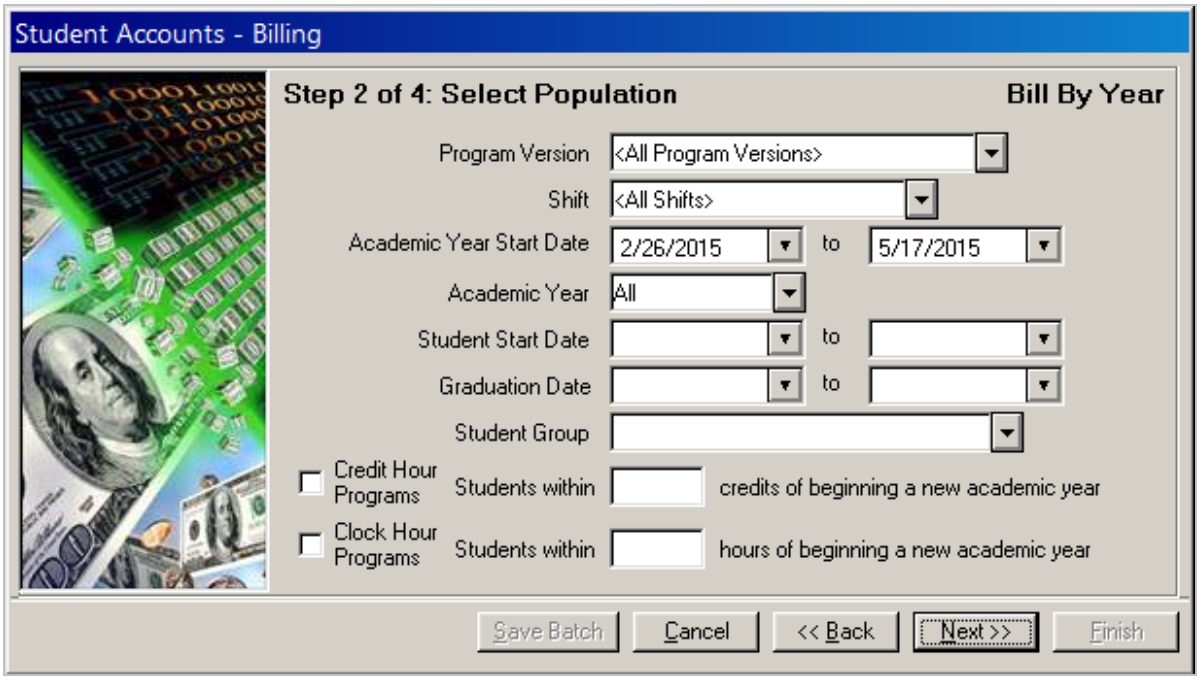
- Select the **Term** for which the billing is being processed.
- Select the **Program Version** or accept <All Program Versions> (default).
- Select the **Shift** or accept <All Shifts> (default).
- Optional: Select the **Lowest Class Start Date** and **Highest Class Start Date**
- Optional: Enter the **Student Start Date** range.
- Optional: Select a **Graduation Date** range.
- Optional: Select a **Student Group**.
- Select all charges/fees you want to **Include**.
- Select **Categories to Include**. Categories are student statuses that comprise the population.

B. If you selected **Bill by Term**, Step 2 is displayed as follows:



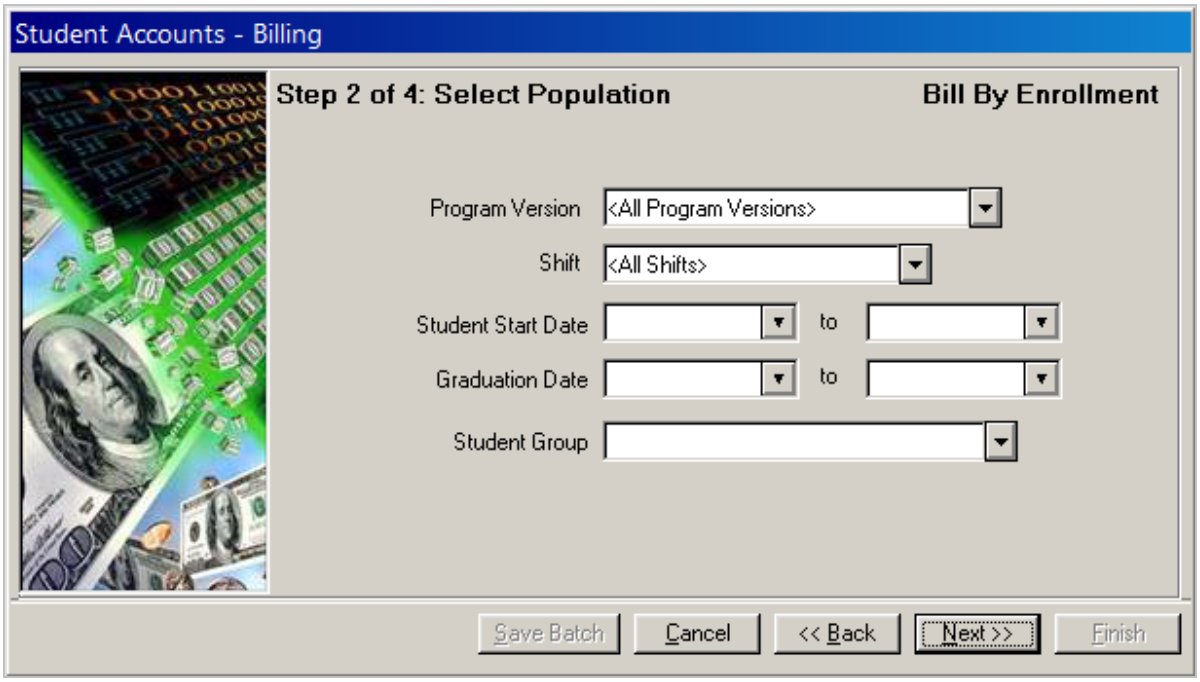
Select **Categories to Include**: All student statuses that comprise the population.

C. If you selected **Bill by Academic Year**, Step 2 is displayed as follows:

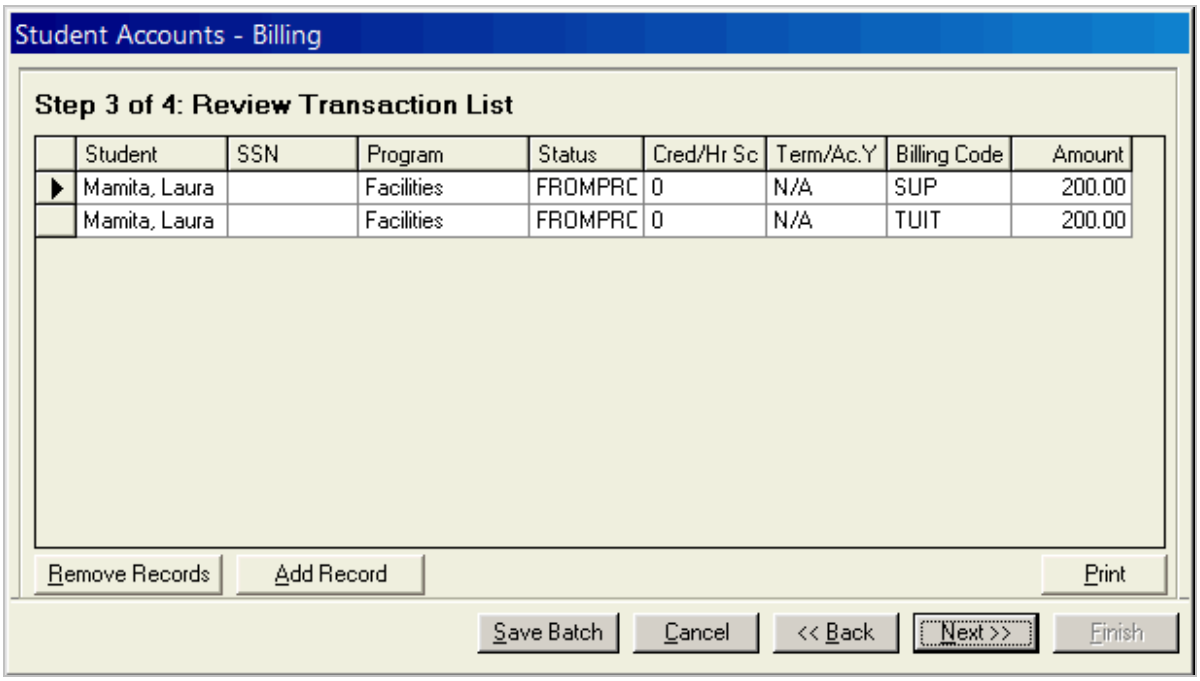


- Indicate if billing shall be by Credit Hour Programs, Clock Hour Programs or both.
- Specify the number of credits/hours to indicate students shall be included within this number of beginning a new academic year.

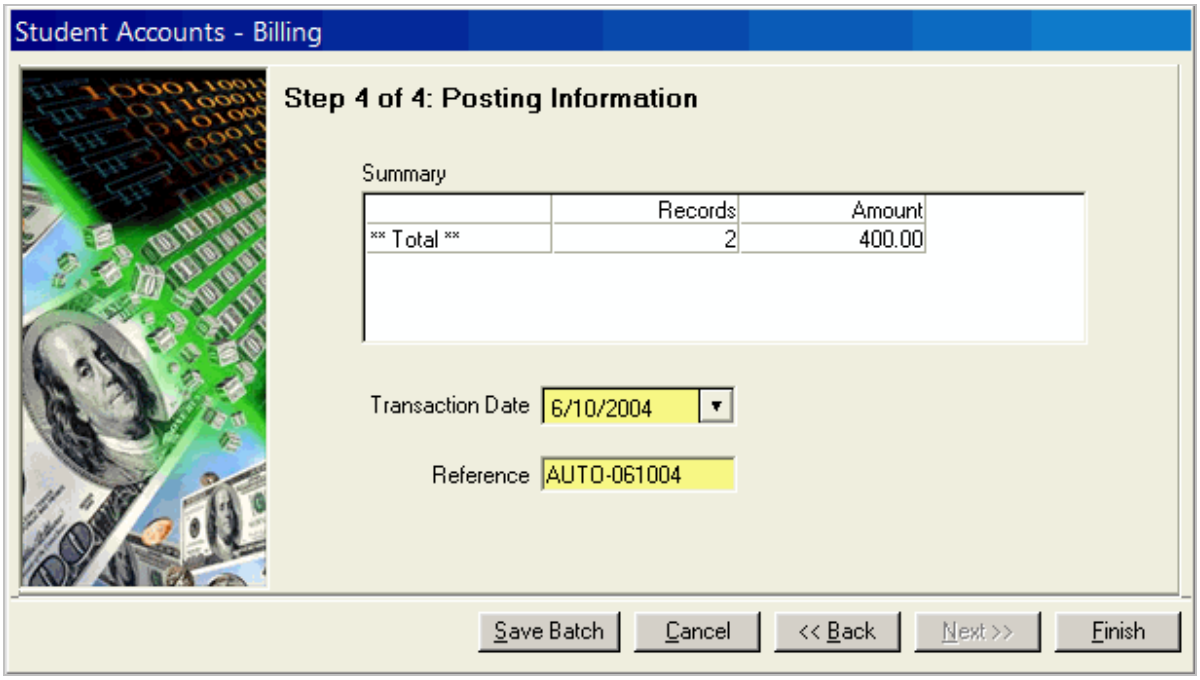
D. If you selected **Bill by Program/Enrollment**, Step 2 is displayed as follows:



5. Click **Next** to go to Step 3. The wizard gathers transactions to be processed in this billing. A grid displays the transactions to be posted to the Student Ledger cards. You can add a record, delete records, and save the batch.



6. Click **Print** to view and print a list of the transactions to be charged to your students. After printing your **Registration Billing Report**, you may want to **Cancel** the process and take time to review the report. If so, you can restart the wizard again after reviewing the report.
7. Click **Next** go on to Step 4. This page shows a summary of transactions to be posted.



8. Enter the **Transaction Date** to appear on each transaction that is posted.
9. The **Reference Number** is automatically generated by the wizard.
10. Click **Finish**. The charges are posted to the ledger cards.
11. A confirmation message is displayed. Click **OK**.

Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

Process Pending Charges/Adjustments

Pending charges result from schedule changes made between the time a student is billed for a term and the end of the add/drop period for that term. Pending charges are committed to the student's Ledger Card once the add/drop period expires. The Process Pending Charges/Adjustments form provides a convenient way to post, delete, print, recalculate a term or payment period's pending charges. Be sure to enable Required Pending Charges Review to review and process Pending Charges/Adjustments before they are posted to the student Ledger Card. To edit pending charges for a student, do so in the Student's Ledger Card.

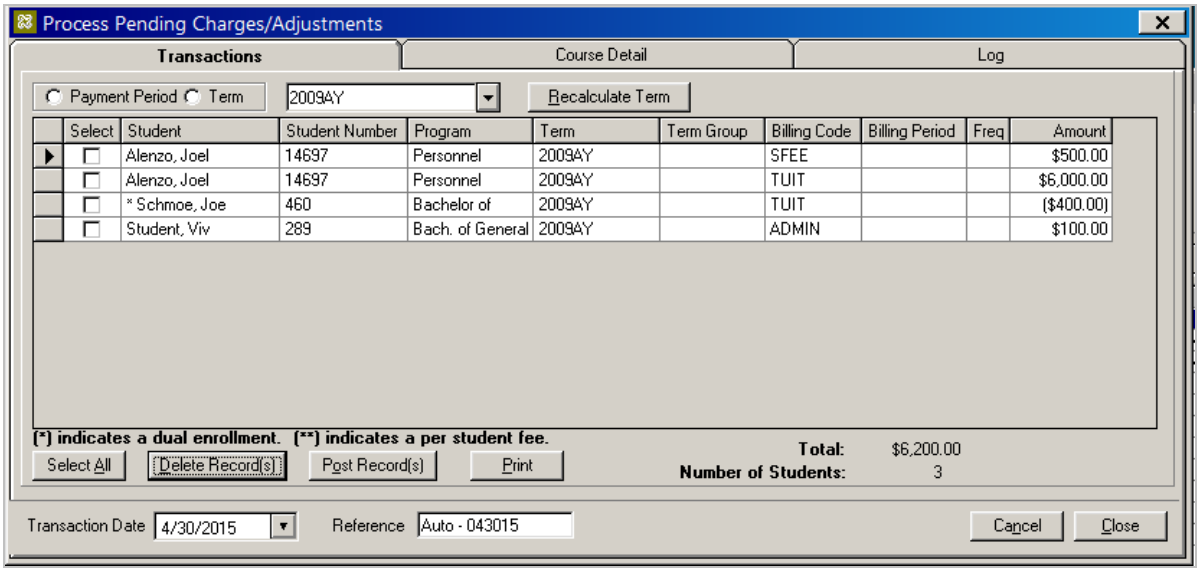
If a student is billed more than once per term and the billing method is a rate schedule using flat amounts, the billing details tab is updated upon registration for any transaction code if the overall amount of the flat fee does not change. This is to break down the amount of the overall charge per course.

Users can include or omit pending charges on Student Accounts reports, as required by the school.

Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

To see Pending charges for students by term:

1. Navigate to **Daily > Student Accounts > Process Pending Charges/Adjustments**. The Process Pending Charges/Adjustments form is displayed.
2. The Term option is selected by default. Select a **Term**. If there are no pending charges for the campus, an informational message appears, otherwise CampusNexus Student displays a list of student's that have pending charges that meet the following Term criteria:
    - The Term is active, open, and a Student Accounts term.
    - The Term must have students with billing methods configured for auto billing with manual review and courses with a scheduled or current status in an enrollment with a category of "active" or "enrollment".



3. To view pending charges/adjustments by payment period, select the **Payment Period** option. The following search fields are displayed:
    - **Select Billing Method**
    - **Ac. Year**

- **Pmt. Per.**
- **Pmt. Per. Start Date**

Specify appropriate values to search for associated pending charges.

When billing methods are configured to Payment Period, charges calculated when registering for courses are associated with payment periods that exist in the Financial Aid module at **View > Financial Aid > Academic Year > Payment Period** (button).

Note: The end date of the course section must fall within the Payment Period dates to be associated with that payment period.

4. To select all student's in the list, click **Select All**. A check mark appears in the **Select** field for all student's in the list.
5. To select specific student, select the **Select** field in the column to the left of the student's name.

   Note: Each record that is part of a connected enrollment is indicated by a check box in the connected enrollments column (second column from the left).
6. To delete pending charges, click **Delete Record(s)**. A confirmation message is displayed. Click **Yes**. The Delete Record(s) button is disabled if you do not have permission to delete individual pending charges within the "Post Pending Charges" option.

   If charges are deleted, you can select to "Recreate Pending Charges" for active/open terms only. Generally, institutions correct a pending charge, rather than deleting the charge. This adds increased security to the option.
7. To recalculate a term, click **Recalculate Term**. The following message is displayed: *"All students registered for courses in the selected term who have a billing method configured for auto billing will have their posted charges and pending charges/adjustments recalculated."*

   Click **Continue** to proceed or **Cancel** to quit. A confirmation message is displayed if the recalculation was successful, otherwise a message will state that no pending charges were created or modified. An entry will be recorded under the **Log** tab.

   Upon receipt of the *"Recalculation complete"* message, select the records you want to post to the students' ledger cards and click **Post Record(s)**.

   When recalculating a term, the automatic billing settings must be as follows: The Frequency must reflect Term/Quarter or Course, and the Automate Registration Charges and Adjustments field and Use Rate Schedule must be selected. See Billing Methods setup instructions for Term/Quarter before proceeding to recalculate a term.

   An institution may want to recalculate a term when the wrong billing method was assigned to the student or program version. If the error was not discovered before students were registered into courses, they will be charged the wrong amount. In this case, the billing method for each student needs to be changed and charges recalculated.

   Another reason to recalculate a term may be that the billing method was not updated to reflect a new rate increase when students registered for their courses. These pending charges or adjustments would need to be recalculated.
8. The label of the Recalculate Term button is changed to 'Recalculate Payment Period' when pending charges that contain a payment period are retrieved. When payment period billing is selected, including the Post Transaction Details under Lists > Student Accounts > Billing Methods, select the pending charges to recalculate and click **Recalculate Payment Period**.

   For a given payment period to be recalculated at least one pending charge that has a given payment period must be selected. Pending charges are posted to the ledger for those courses that are current and have attendance posted.

Course Retake Logic and Payment Period Billing

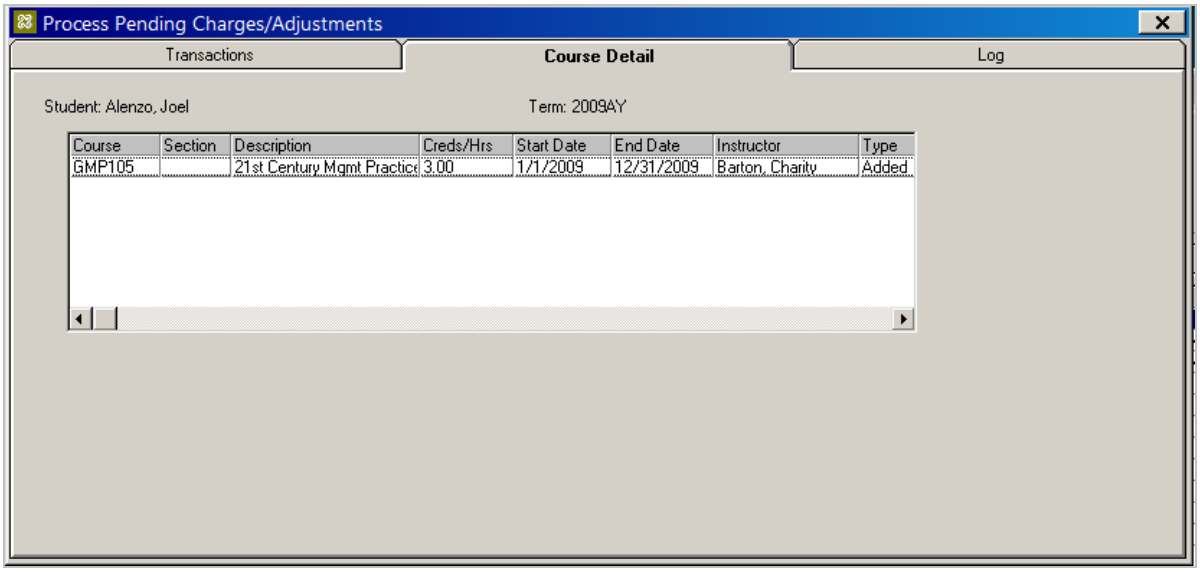
When students in non-term programs are billed for their courses, CampusNexus Student assigns the charges to the payment period where the course end date falls; however, if students are retaking a course for which they have previously earned credit, and they are not taking any other required courses, then the course will fall outside the payment period dates. In such cases, the billing functionality is such that the charges are assigned to the previous payment period.

During the registration process for a student being registered for a course retake (in which credit was already earned), CampusNexus Student displays the following message: *"This course is a retake for which credit was previously earned and will be billed to the previous payment period when there aren't any existing payment periods that encompass this course's end date."*

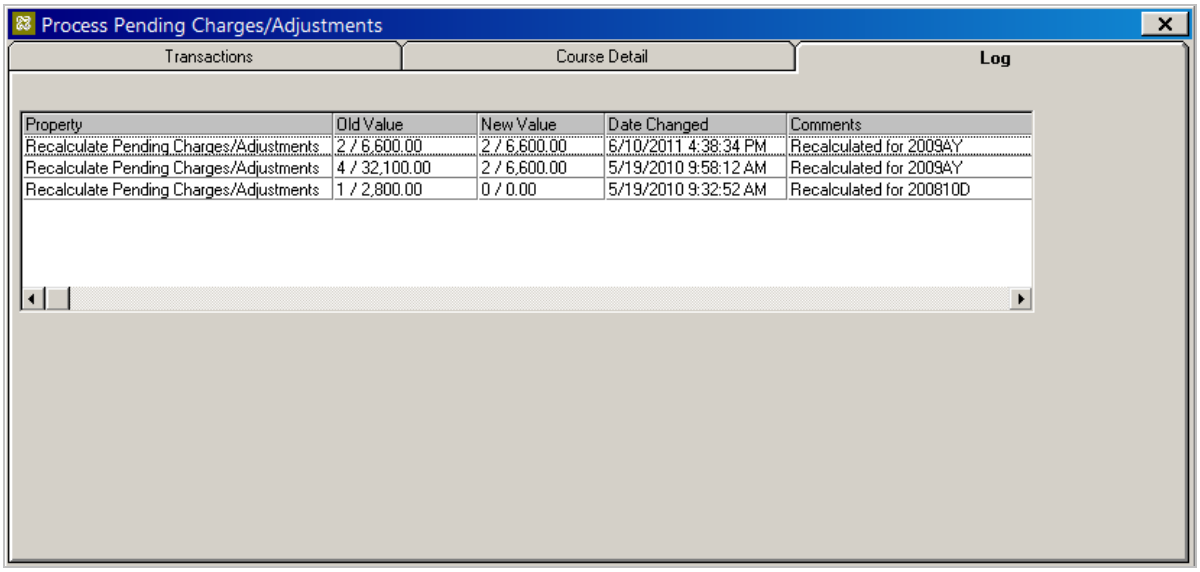
9. Click **Post Records (s)** to post the student's pending charges for the term to the student's ledger card. See View > Student Accounts > Ledger Cards > Adjustments tab to verify the pending charges are posted to the ledger card correctly.
10. Click **Print** to generate the **Pending Charge Review** report. The report contains the information displayed in the grid.
11. Select a **Transaction Date**. This date is displayed in the student's ledger. The date should reflect the same date as the transaction date on registration billing and post batch charges/adjustments.
12. If desired, change the **Reference Number** to a school-defined format. The default format is `Auto-ddmmyy`, where `ddmmyy` represents today's day, month, year. The Reference Number indicates that this batch for this term was processed by the Automatic Registration/Adjustment feature on this date.

    The **Total** field displays the total amount of pending charges for the student's listed.

    The **Number of Students** field indicates the number of students listed.
13. Select the **Course Detail** tab to view a list of all courses for which students registered in a particular term and information about the courses.



14. Select the **Log** tab to view a list of all pending charges changes for the term.


Process Pending Charges/Adjustments
Transactions
Course Detail
Log
Property
Old Value
New Value
Date Changed
Comments
Recalculate Pending Charges/Adjustments
2 / 6,600.00
2 / 6,600.00
6/10/2011 4:38:34 PM
Recalculated for 2009AY
Recalculate Pending Charges/Adjustments
4 / 32,100.00
2 / 6,600.00
5/19/2010 9:58:12 AM
Recalculated for 2009AY
Recalculate Pending Charges/Adjustments
1 / 2,800.00
0 / 0.00
5/19/2010 9:32:52 AM
Recalculated for 200810D

Post Batch Charges/Adjustments

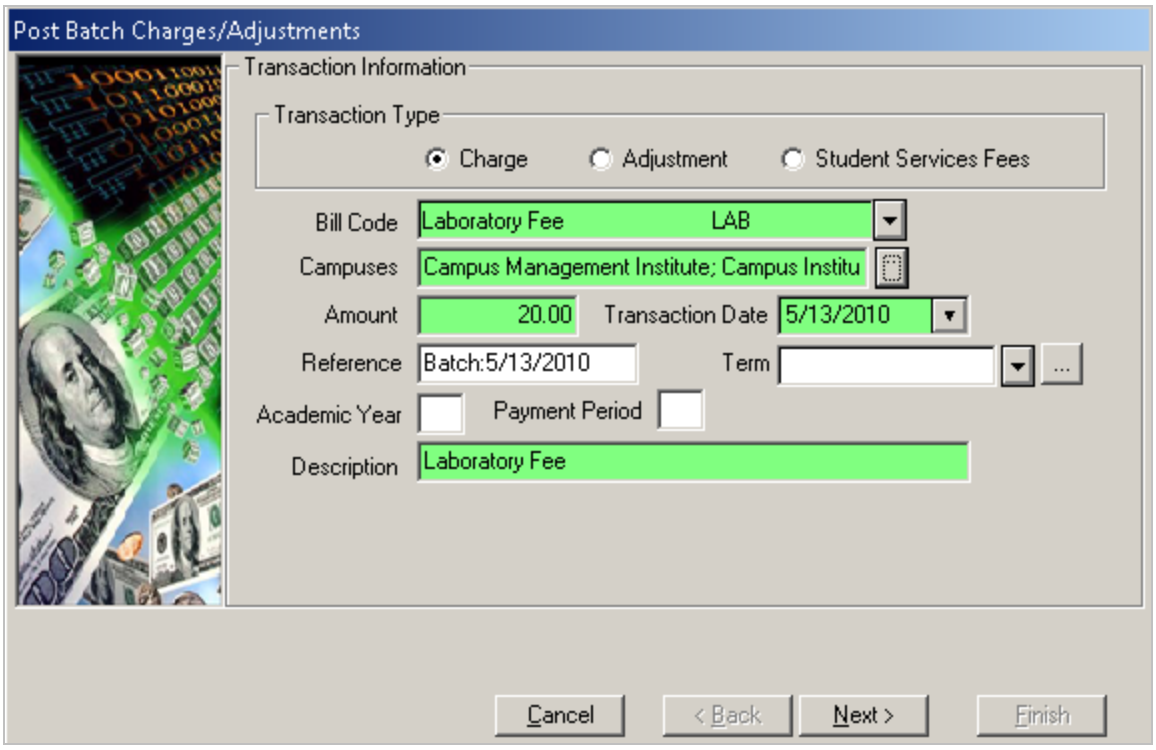
This feature is used to batch post charges and adjustments, outside of registration billing, to a defined group of students based on various selection criteria. This wizard consists of three form allowing you to define the transaction, select the criteria for gathering students, display and print a list of students and charges, and post the charges to the students' ledger cards. Posting rules are enforced, such as minimum transaction date, earning date, and last GL release date.

Note: This feature should be used in conjunction with registration billing, not as a replacement for billing tuition!

Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

To post a batch of charges or adjustments:

1. Navigate to **Daily** > **Student Accounts** > **Post Batch Charges/Adjustments**. The Post Batch Charges/Adjustments wizard is displayed.



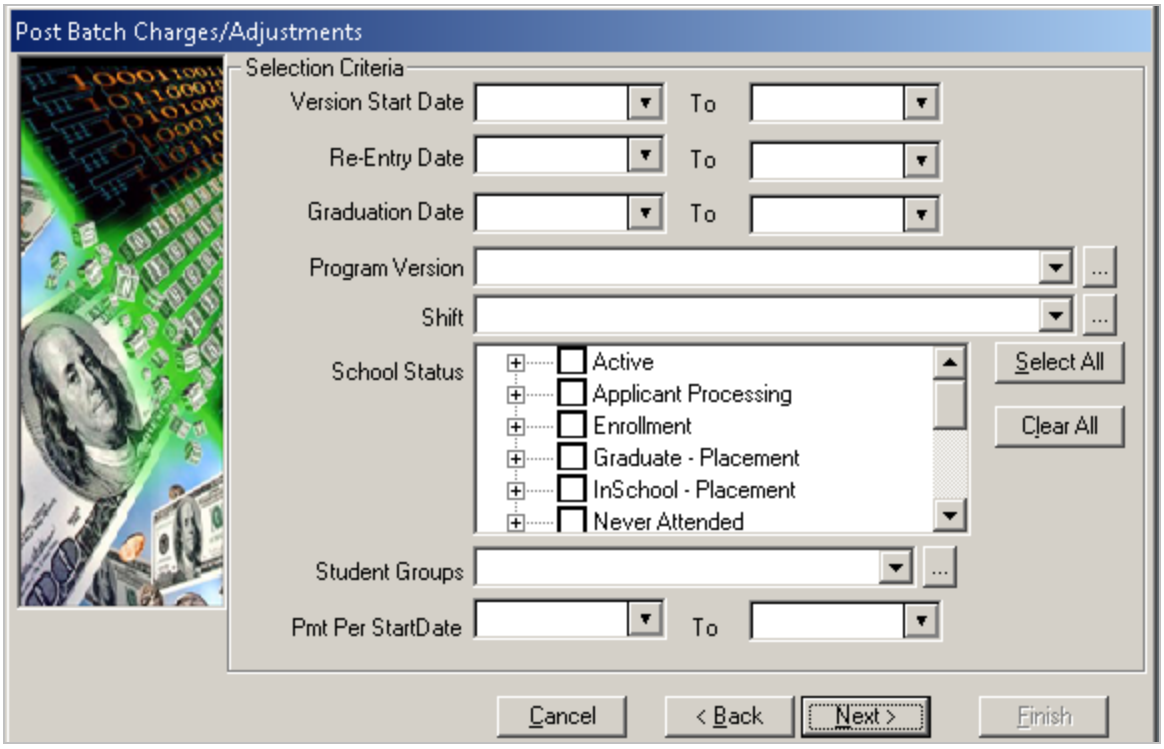
2. Select a **Transaction Type**: Charge, Adjustment, or Student Service Fees.
3. Select the **Bill Code** (Transaction Code) for the transactions to be posted. The bill code selection drives the campus selection.
4. Select the **Campuses** to which the transactions apply.

   Note: A bill code mapped to a subsidiary drives the campus selection to include only those campuses available for the subsidiary. A bill code not mapped to a subsidiary drives the campus selection to include campuses available for that bill code and will post to the student ledger.
5. Enter the **Amount** (default: 0.00), **Transaction Date** (default: today's date), and **Reference** (default: "Batch +

Today's Date"; up to 16 characters).

6. If earning method is by term, enter the **Term**.
7. Enter the **Academic Year** and **Description** (default: standard description).
8. For Student Services Fees transactions, select the **Service Category** and **Service**.
9. If earning method is by payment period, enter the **Payment Period**.

   Note: Either Term or Payment Period are required.
10. Click **Next**. The Selection Criteria form is displayed.



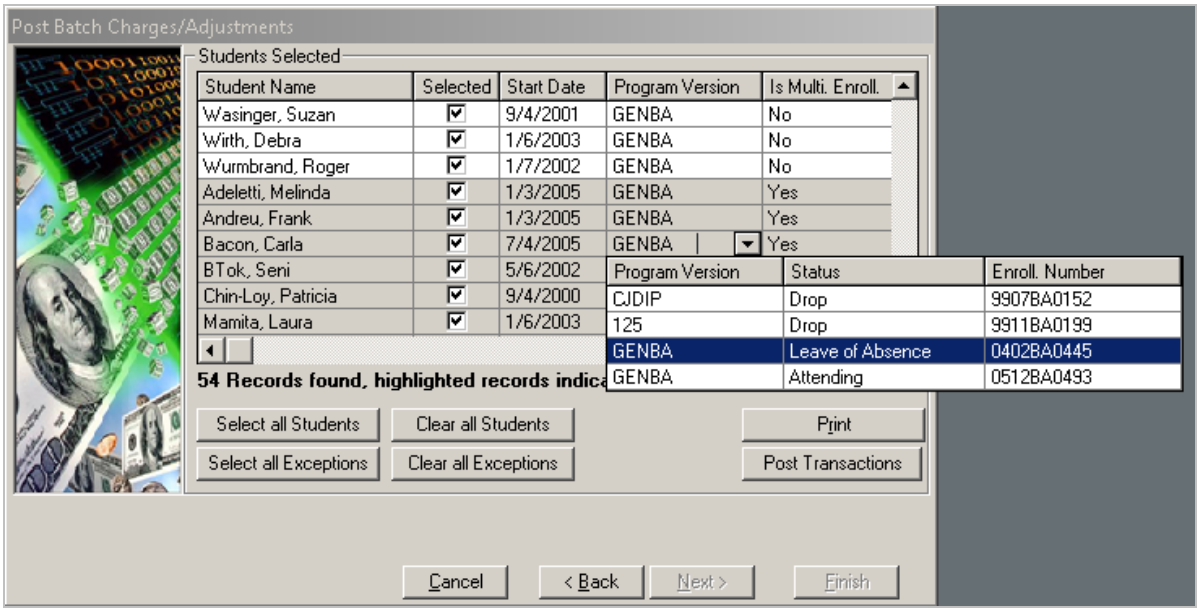
11. Select or enter the **Selection Criteria** as required. Click ... to select more than one value.

    - Version Start Date range
    - Re-Entry Date Range
    - Graduation Date range
    - Program Version
    - Shift
    - School Status
    - Student Groups (all active student groups; multiple Student Groups can be selected)

    To create additional selection criteria, generate a student group through the reporting functions.

    The Version Start Date Range selects students using their Expected Start Date if the student's Start Date is not populated. This allows students to be located who are currently in a non-attending enrollment and therefore do not have a value entered for their Start Date.

    The Pmt. Per Start Date range field is displayed if Payment Period was entered in the previous step.
12. Click **Next**. The Students Selected form is displayed.



13. Select the students to include or exclude by clicking the check box in the **Selected** column. You can also use the **Select All Students**, **Clear All Students**, **Select All Exceptions**, and **Clear All Exceptions** buttons to select records.

    A **Yes** in the **Is Multi. Enroll.** column means the student has multiple enrollments. For students with multiple enrollments, click in the **Program Version** column to select the enrollment to which the charge/adjustment will be posted.

    Note: The default enrollment in the drop-down list is selected on the basis of status hierarchy. If the same status is found for more than one enrollment, then the most recent enrollment is selected based on the enrollment number.

14. Click **Print**, before or after posting, to print a list of the transactions.

15. Click **Cancel** to close the wizard without saving or posting any transactions.

16. Click **Post Transactions** to post the charges or adjustments to the students' ledger cards.

17. A confirmation message is displayed. Click **OK**.

    When the transactions are posted, the Post Batch Charges/Adjustments form closes to prevent you from accidentally posting more than once.

    Note: The User ID of the user running the Post Batch Charges/Adjustments wizard is the ID stored with the transaction detail.

Generate Interest Charges

Some institutions charge students or third-parties interest on the balance of a student payment plan. You can run the Generate Interest Charges process once a month, once per term, or any other schedule, to calculate and post interest charges to the students' ledger cards. Student and third-party payment schedules are created when packaging financial aid or when completing the student payment schedules form.

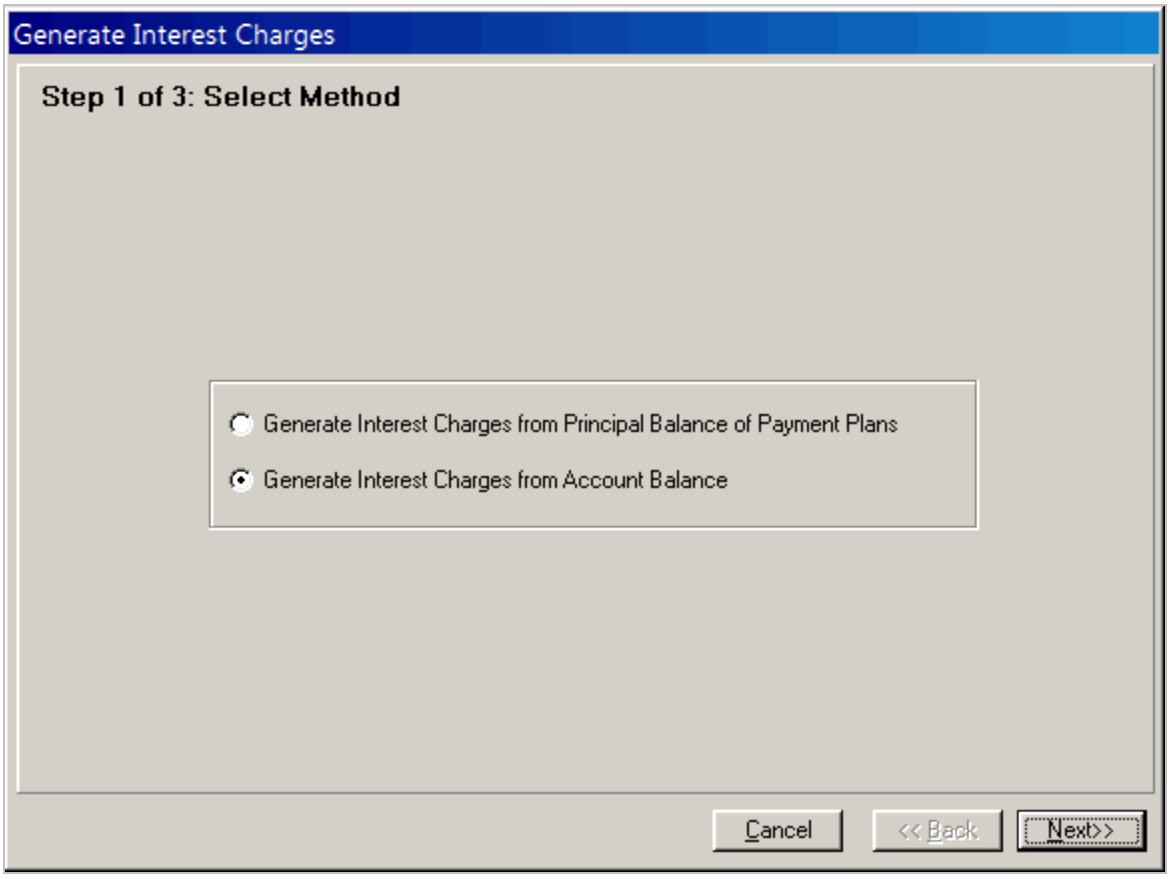
For example, a student and your institution have agreed that the student will pay $100.00 per month for 18 months at 5% interest to cover the cost of tuition. After making 3 payments the student owes $1,500.00. When you run the Generate Interest Charges process, CampusNexus Student calculates the interest due on the $1,500.00 balance and posts it as a charge to the student's ledger card.

Institutions can configure transaction codes as interest transactions and then select them from this wizard. The process uses the selected transaction code's interest when applying interest to student accounts.

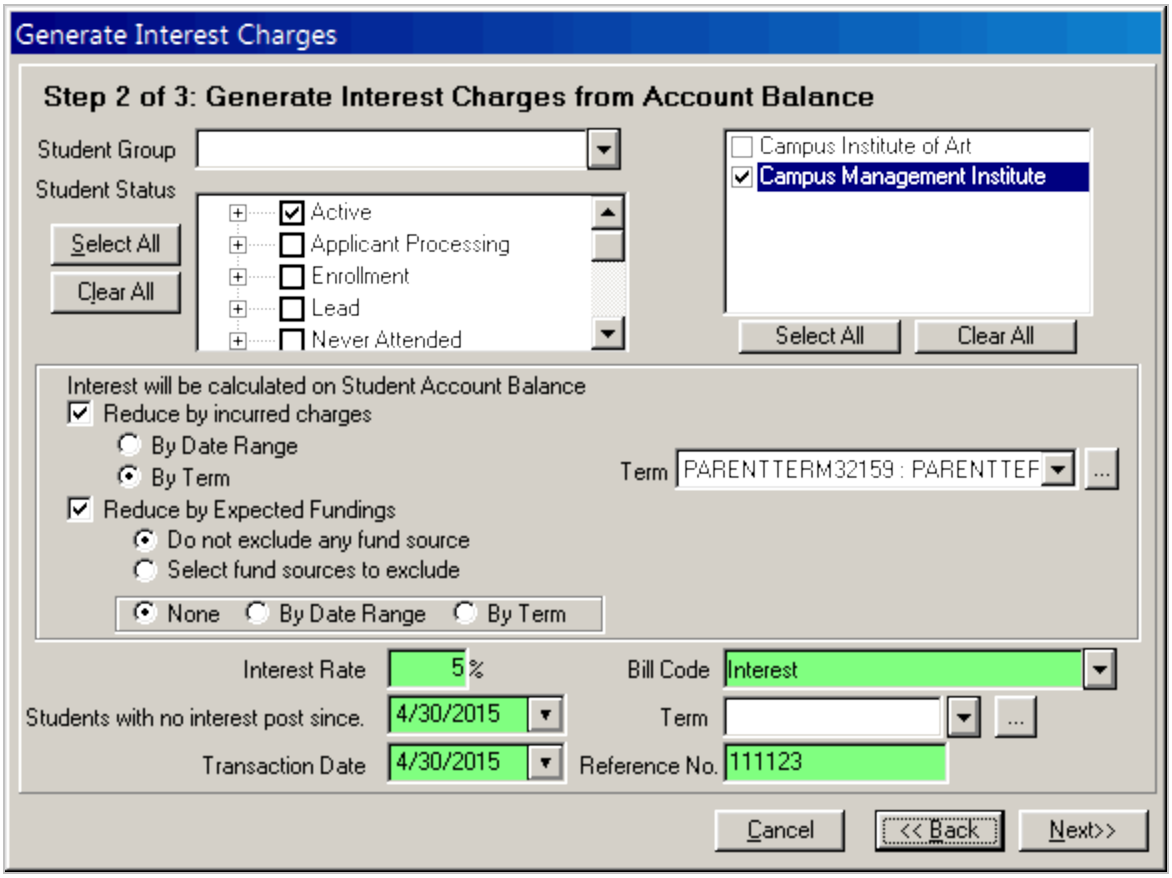
You can filter by campuses, fund sources, terms, bill code, transaction date, and reference number. Specific school statuses can also be selected on a multiple or individual basis, similar to the Generate Principal Charges functionality. CampusNexus Student displays only *active* values in the drop-down lists.

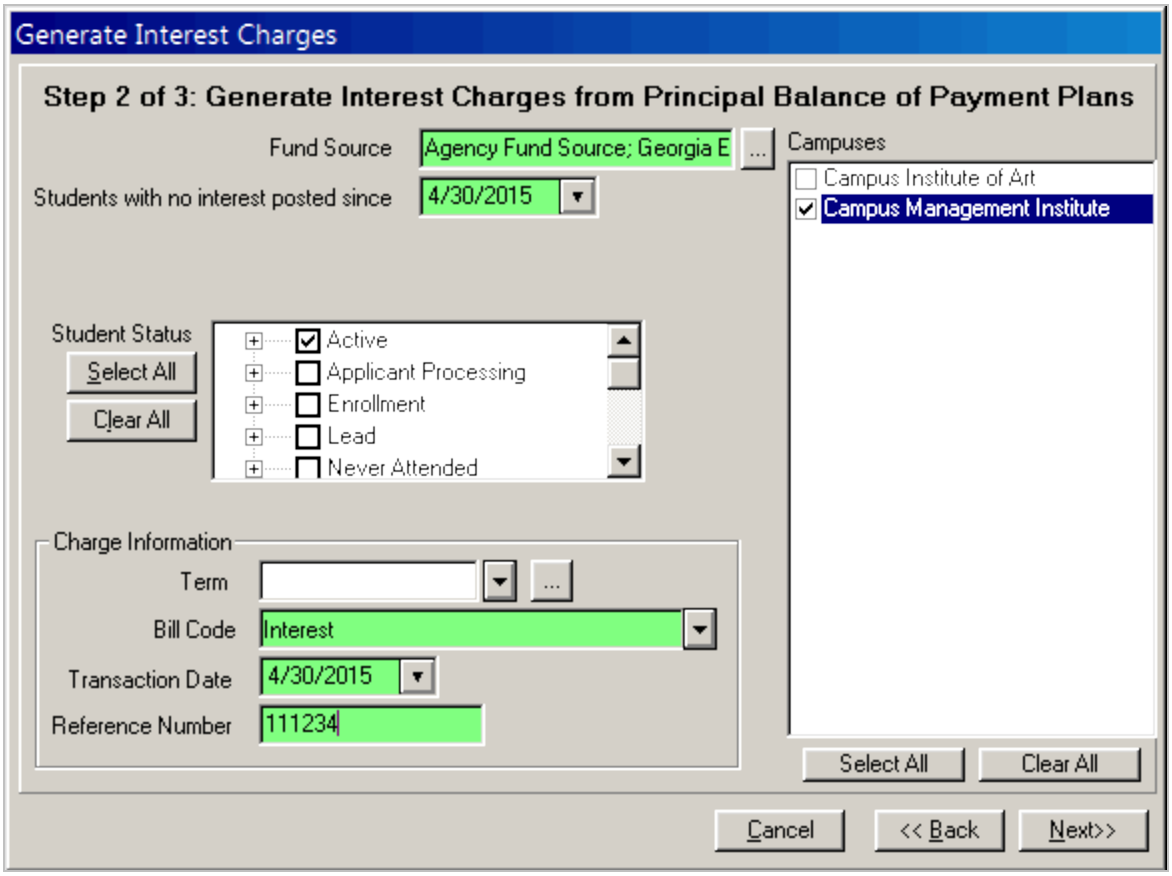
To generate interest charges:

1. Navigate to **Daily** > **Student Accounts** > **Generate Interest Charges**. Step 1 of the Generate Interest Charges wizard is displayed.

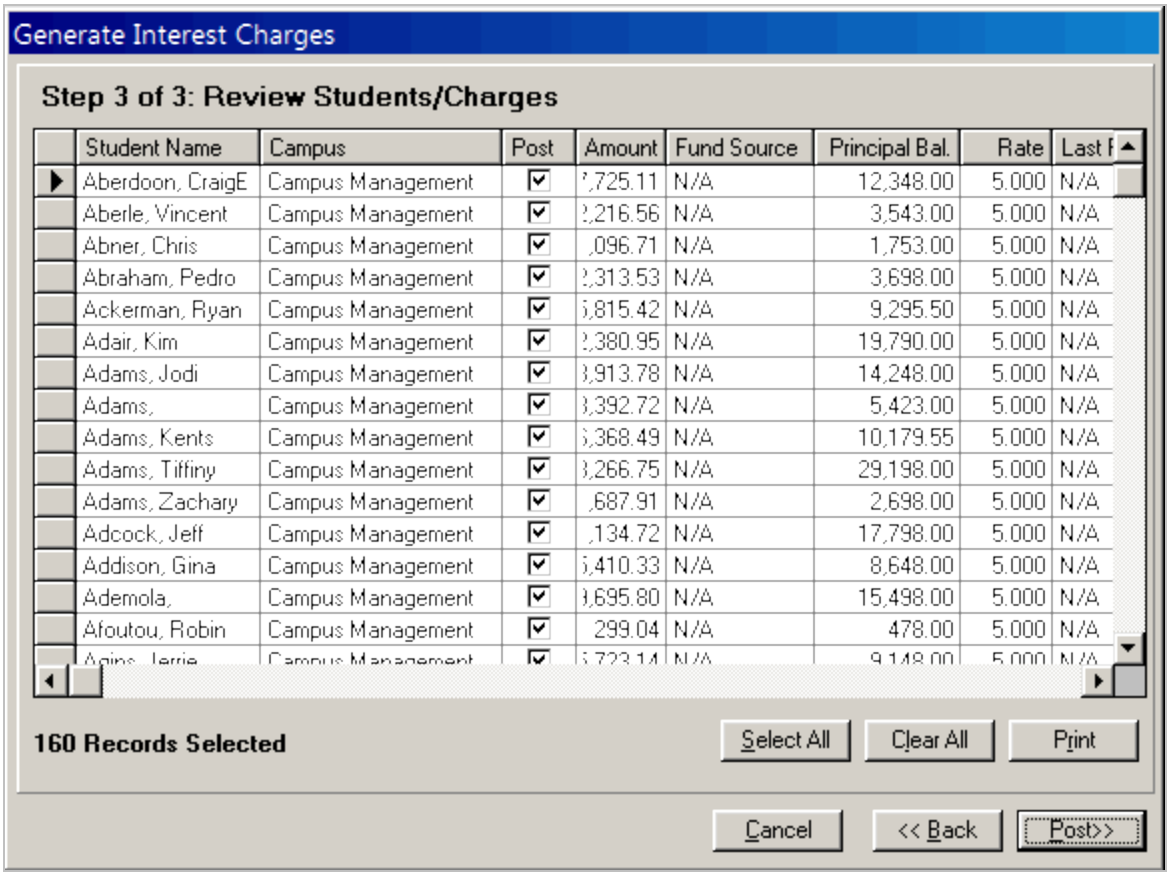


2. Select the method for generating interest charges and click **Next**.
3. Depending on the method chosen, one of the following forms is displayed for Step 2.


Generate Interest Charges
Step 2 of 3: Generate Interest Charges from Account Balance
Student Group
Student Status
Select All
Clear All
Active
Applicant Processing
Enrollment
Lead
Never Attended
Campus Institute of Art
Campus Management Institute
Select All
Clear All
Interest will be calculated on Student Account Balance
Reduce by incurred charges
By Date Range
By Term
Term
PARENTTERM32159 : PARENTTEF
Reduce by Expected Fundings
Do not exclude any fund source
Select fund sources to exclude
None
By Date Range
By Term
Interest Rate
5 %
Bill Code
Interest
Students with no interest post since.
4/30/2015
Term
Transaction Date
4/30/2015
Reference No.
111123
Cancel
<< Back
Next>>



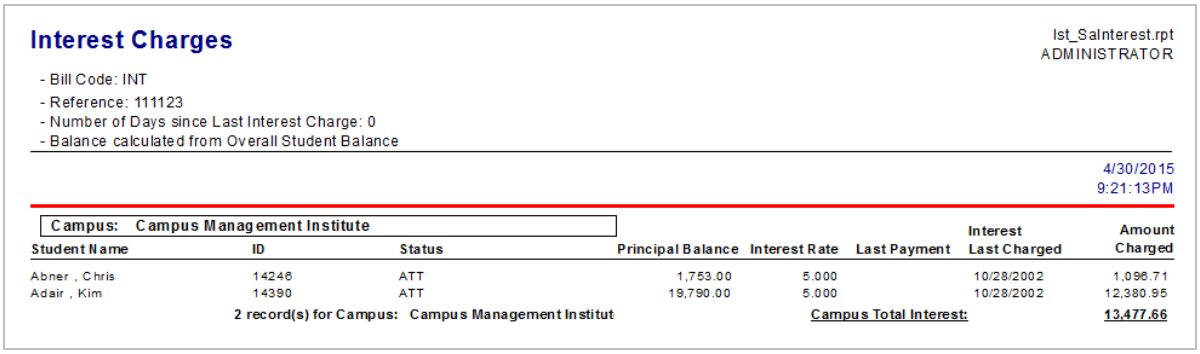
4. In the Generate Interest Charges from Account Balance form:
    - If you select **Reduce by incurred charges within date range**, you must specify values in the **From** and **To** fields.
    - If you select **Reduce by Expected Funding**, additional options become available. You can opt not to exclude any funding source.
    - If you select **Select fund sources to exclude**, CampusNexus Student displays a list of Fund Sources from which to select. Use the drop-down list to select one fund source, or click ... to select multiple Fund Sources.
5. Enter the **Interest Rate** if you are generating interest charges from the account balance.
6. Select a **Term**. CampusNexus Student checks for an Override Required Term indicator on the Interest transaction code (INT). This check is performed only if the Require Term Codes option has been selected. If term codes are required on transactions, and if the Interest transaction code has the Override Required Term indicator turned on, CampusNexus Student does not require a term code to post the transaction.
7. Specify the **# of days from Last Interest Charge**. CampusNexus Student gathers all students who have not been charged interest since this specified number of days has passed.
8. Enter the **Transaction Date**(default: current date).
9. Enter a **Reference Number**.
10. Click **Next**. The Review Students/Charges form is displayed.



Note: A column containing the student's enrollment campus was added to the Review/Student Charges page of the wizard, as well as the Interest Charges report.

11. Select or clear the applicable records in the Post column and click **Post**.
12. A confirmation message is displayed. Click **Yes**.
13. When the posting is complete, another confirmation message is displayed. Click **OK**.

A report displays the interest charges that were posted.



Post FA Disbursements

Use this procedure to post financial aid disbursements after they have been approved by the FA Department. CampusNexus Student finds the approved batches of FA disbursements and lists them prior to posting in the students' accounts.

Notification of Receipt

The Student Accounts Post FA Disbursements form prints a Notification of Receipt for each FA disbursement received in the posted batch. If FA disbursement received transactions are posted, and the FA fund source type is not CASH, the corresponding Notification of Receipt is printed.

To determine which Notification of Receipt report should be loaded when this option is selected, CampusNexus Student checks for a receipt report for the fund source received using the following steps:

a. If a cst_Fa*nnnnnnnn*Receipt exists (where *nnnnnnnn* = Fund Source code), that report is loaded.
b. If a cst_Fa*nnnnnnnn*Receipt does not exist, CampusNexus Student checks for a cst_FaDefaultReceipt.
c. If it does not exist, the lst_FaDefaultReceipt is loaded.

After printing the receipts for the selected transactions, CampusNexus Student updates FaDisb.DateReceiptPrinted with the system date.

Disbursements for More than One Fund Source

A posted batch of FA disbursements can include disbursements for more than one fund source. This means that it is possible that more than one receipt report needs to be used when generating these receipts. The option to print receipts is available after clicking Save to post the batch.

When Pell disbursements are posted to the students' ledger cards, the disbursement records are marked as Ready to Send to RFMS if they have not already been marked as such. This is only applicable if the fund source type is 'Pell'.

If the fund source for the disbursement being posted is a direct subsidized loan, direct unsubsidized loan, or direct PLUS loan, a record is written to the file containing the history of disbursements and refunds sent to COD. These records are transmitted to COD. On the Direct Loan form, you can see these history records on the Received and Refunds tab under "Disbursements at COD".

Direct Loan Disbursement File

CampusNexus Student updates the direct loan disbursement file when a batch of FA disbursements is posted to students' ledger cards. Each disbursement that is "paid" on a student's ledger card is reported to the Loan Origination Center. For each disbursement in the FA batch being posted, CampusNexus Student determines if a row should be added to the Direct Loan Disbursement table. A row will be added to the table if the all of the following conditions are met:

- The fund source type of the disbursement is DIRSUB, DIRUNSUB, or DIRPLUS.
- The Use Direct Loan flag is set to true for the student's campus.
- A row exists in the FA Loan table where the Student Aid ID equals the ID for the FA for which the disbursement is being posted.
- The Scheduled Disbursement Number is greater than zero for the row in FaSched that corresponds to the disbursement being posted.

Servicer Processing

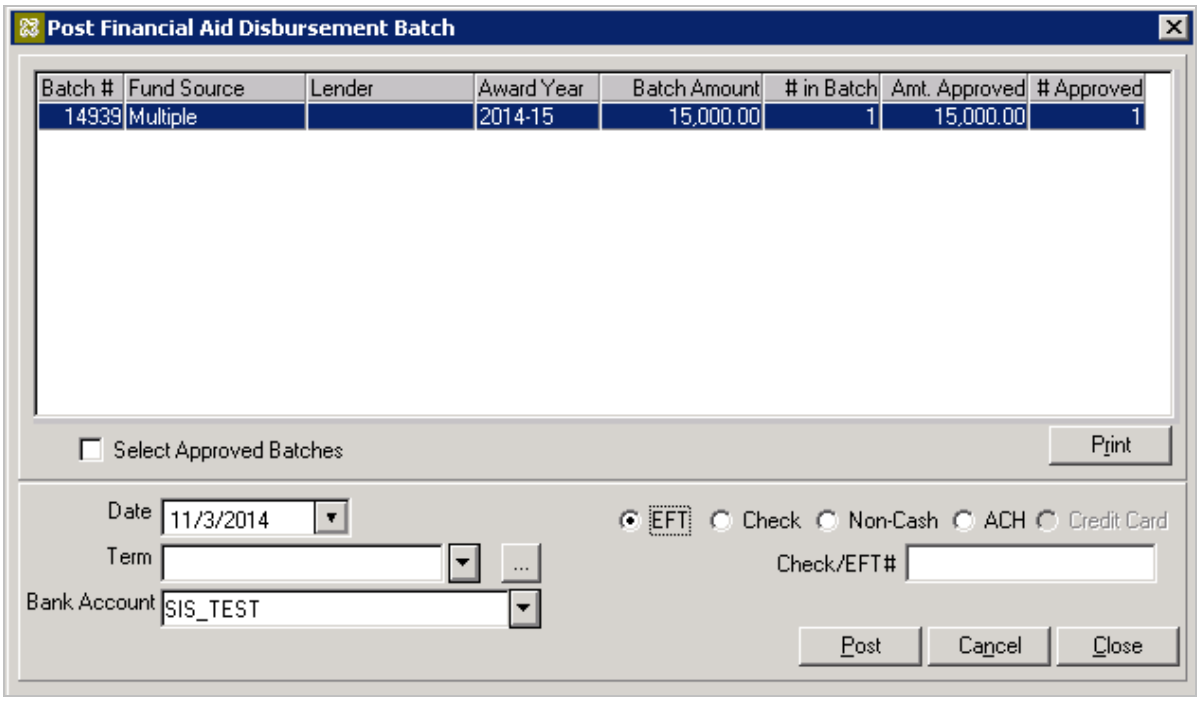
If your institution uses a servicer for processing FA, CampusNexus Student prevents users from posting a servicer disbursement batch if exceptions are found during the import process. If exceptions are found, the batch will not appear on the posting grid. Otherwise (no exceptions found), the batch is displayed normally as available for posting. The Fund Source reads "Servicer Import".

Dropped Students

When a student is dropped from school, CampusNexus Student does not set disbursements to a cancelled status if the disbursements are included in an open batch. CampusNexus Student flags a batch as having dropped students and provides the following message: *"This message is for informational purposes only. Students included in this batch have been changed to a Dropped status. You may continue to approve and pay these students in this process. Disbursements that are not paid must be manually changed to a* ***Cancelled*** *status in the Financial Aid packaging screen."*

To post FA disbursements:

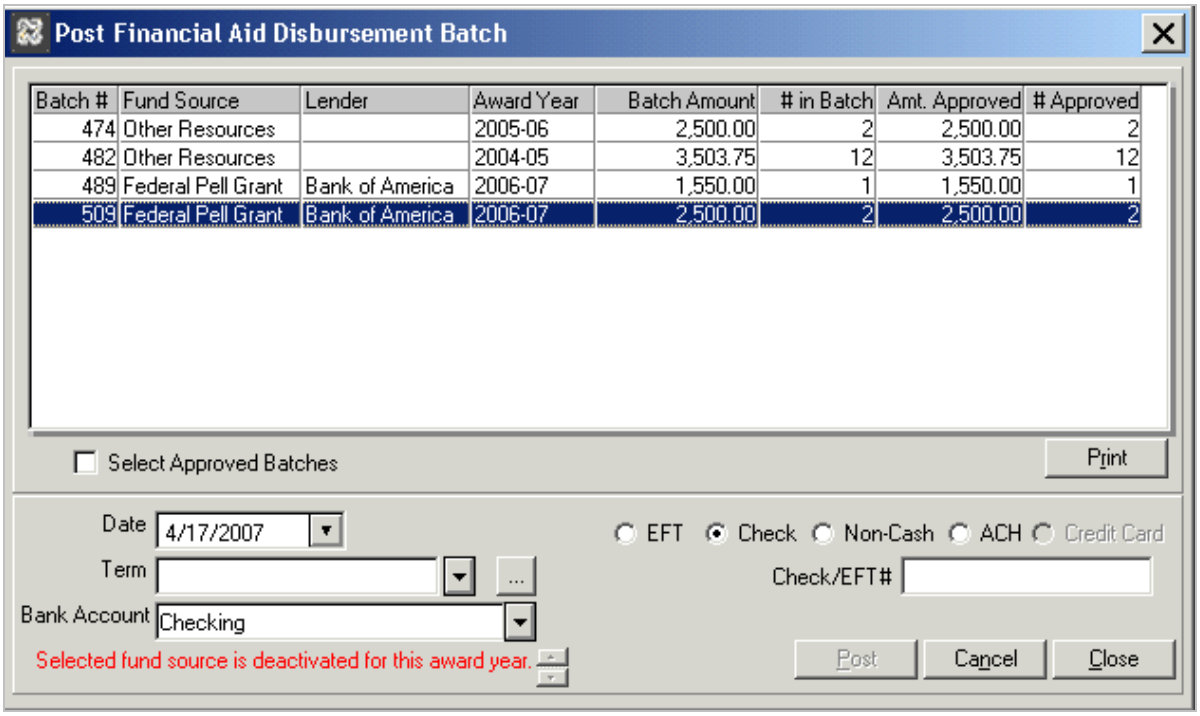
1. Navigate to **Daily** > **Student Accounts** > **Post FA Disbursements**. The Post Financial Aid Disbursement Batch form is displayed.



2. Select the batches to be posted. See Note below if the **Post** button is *disabled* or a red message is displayed.
3. Enter the **Date** of the disbursements.
4. Select the **Term** that applies to these disbursements.
5. Select the **Bank Account**from which the disbursements are distributed. (The bank account will be debited and the student ledger accounts will be credited.)
6. Select the type of payment for the disbursements: **EFT**, **Check**, **Non-Cash**, **ACH**, or **Credit Card**.
7. Enter the **Check Number** or **Electronic Funds Transfer (EFT) Number**.
8. Click **Print** to print the FA **Disbursement Batch Tracking** report.
9. Click **Post**. CampusNexus Student proceeds with the update. When the posting of the batches is completed, the following message is displayed: *"Print receipt notifications for disbursements just posted?"*

   Select **Yes**or **No**as required.
10. Select the **Select Approved Batches** check box to print receipts for previously approved batches. The form

changes as shown below.



11. Click **Print** to print receipts for the disbursements in the batch.

Note: If a batch includes a fund source that is deactivated, a message is displayed in red that contains the deactivated fund source for an award year. The **Post** button is *disabled* for these batches. If the batch contains multiple deactivated fund sources, scroll to see the list of fund sources that are deactivated for the applicable award year.

Posting Results

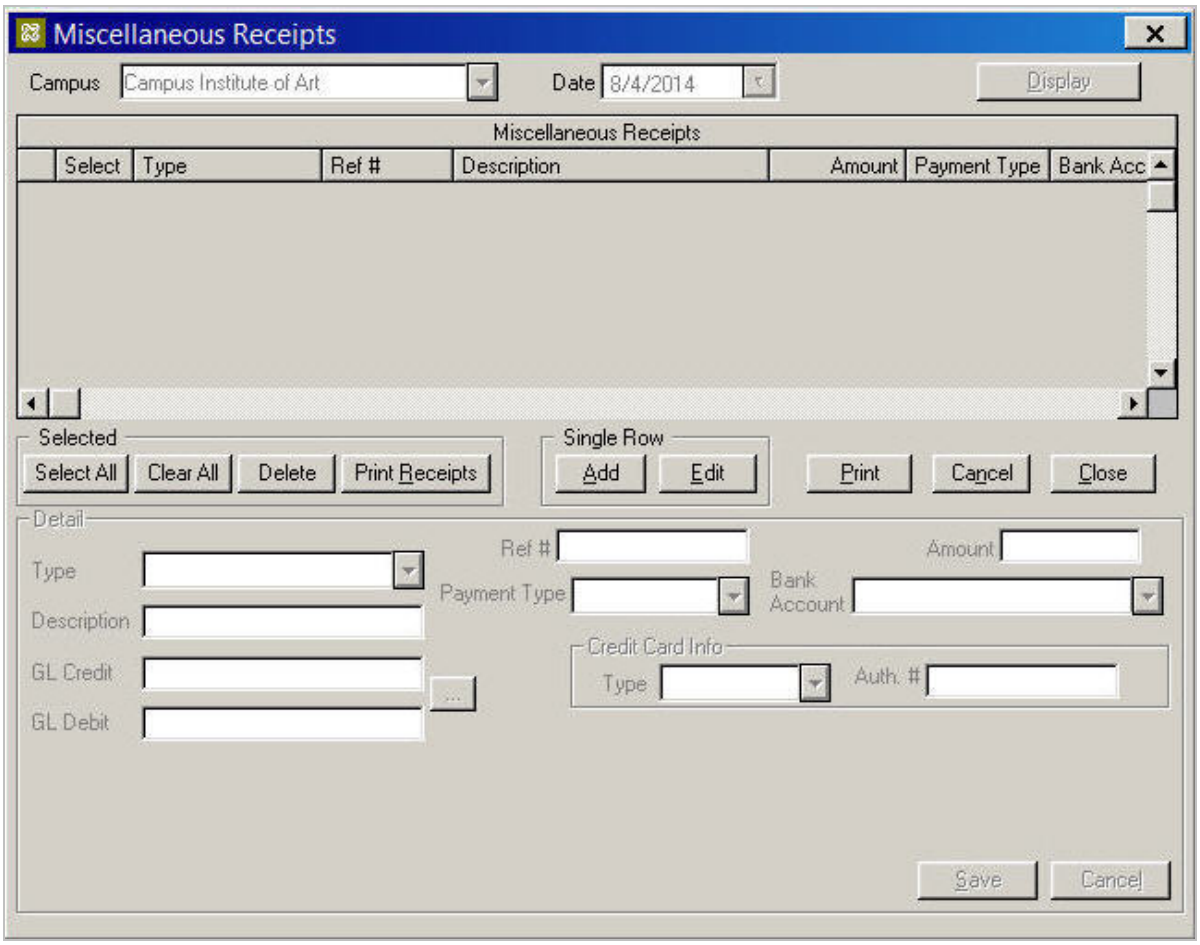
Each disbursement is posted to the appropriate student ledger card. For more information, see Transaction Detail - Detail Tab.

Miscellaneous Receipts

The Miscellaneous Receipts form is used to record, transactions that are not related to academic programs, for example, supplies, bookstore sales, vending machines, events, and so on. You can enter multiple transaction codes, descriptions, and amounts. After entering all transactions for the day, you can save and print the transactions.

To post miscellaneous receipts:

1. Navigate to **Daily** > **Student Accounts** > **Miscellaneous Receipts**. The Miscellaneous Receipts form is displayed.



2. Select the **Campus** for which transactions are to be posted or reviewed.
3. Select the **Date** of the transactions to be posted or reviewed.
4. To review transactions, click **Display**. CampusNexus Student displays the previously entered transactions.

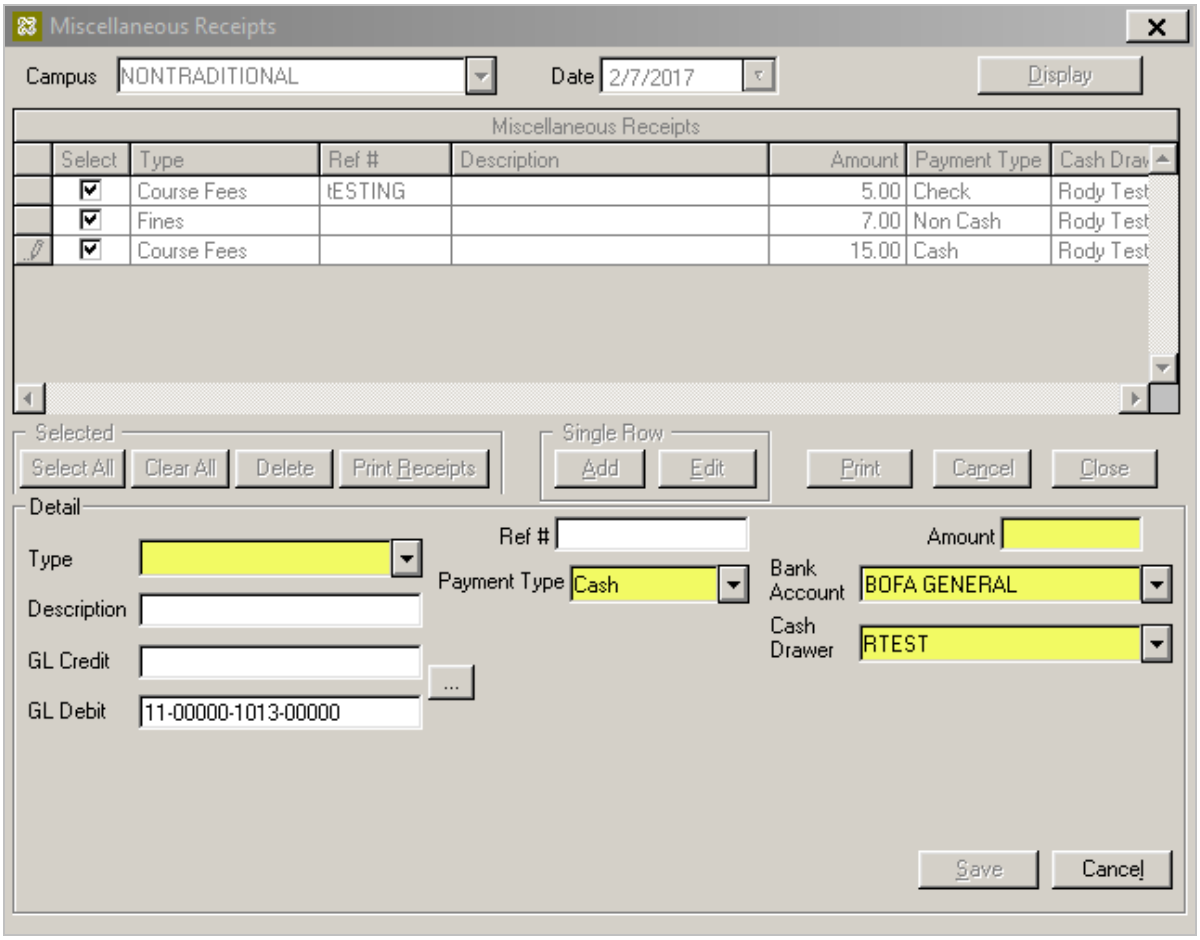
   When CampusNexus Student is integrated with an accounting system, the GL Accounts are verified as being valid GL Accounts by using the transaction date and campus to determine the appropriate fiscal year and ledger based on the journal entry group setup form.
5. Click **Add**, or select a record and click **Edit**.
6. Select the transaction **Type**.

Note: The transaction types available on this form come from Lists > Student Accounts > Transaction Codes. When the codes are set up, you must select a bill type indicator. Select **Misc. Receipts** or **Both** if the code is to be available for posting Miscellaneous Receipts.

7. Enter a reference number in the **Ref # field.**
8. Enter a value in the **Amount** field.
9. Enter a transaction description in the **Description** field.
10. Select a **Payment Type**.
11. Select a **Bank Account**.

    When posting a bank deposit, some of the transactions may come from miscellaneous receipts. They are identified with the description "Misc Receipt" and the student ID is zero.

    Note: If CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll and Cashiering is enabled, in addition to the Cash Drawer, you can also select a bank account to associate to the miscellaneous receipt. All active bank accounts appear in the Bank Accounts field drop-down list. This required field automatically populates with the default bank account for the selected payment type.

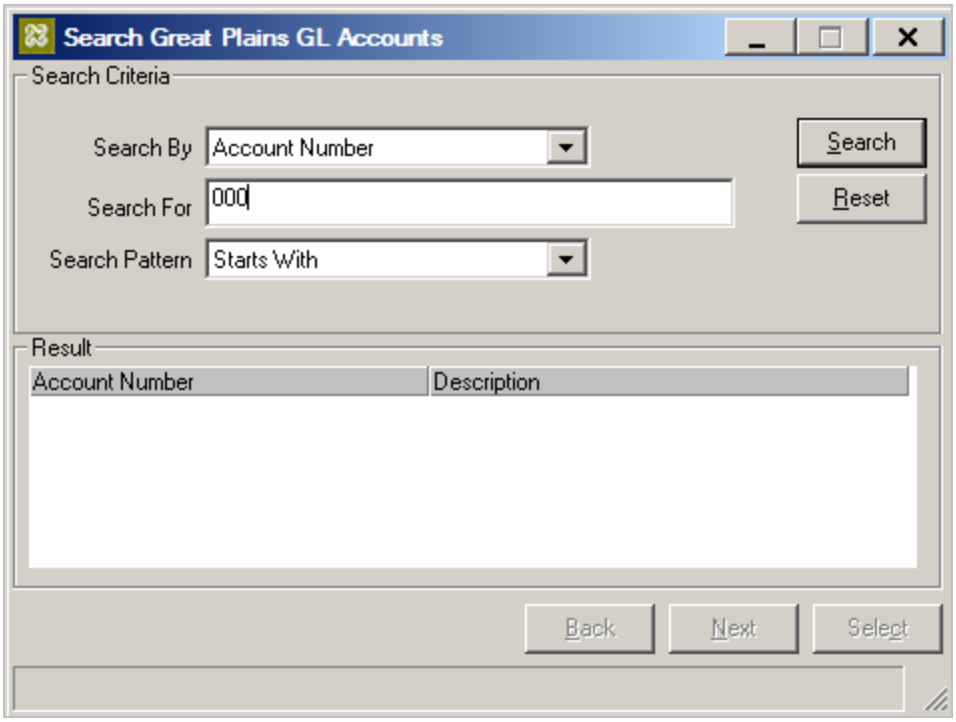


12. If the transaction code allows for entering the G/L numbers, CampusNexus Student enables two columns at the end of the grid allowing you to enter the **Debit** and **Credit** account numbers for the transaction.

- If the Great Plains search feature is enabled, select a row, and click the **Great Plains Search** button to search for Debit Account or Credit Account numbers in the Great Plains GL.

    a. In the Search Great Plains GL Accounts form, click the **Search By** list. Search for GL Accounts using the **Account Number** or **Description**.

    Note: These searches also return Stipend Account information when you have set up separate debit and credit account numbers for stipends.



    b. In the **Search For** field, enter the account number or description.

    c. Specify the **Search Pattern**. The Search pattern works as follows:

        - “Starts With” finds an exact match on data that starts with the characters you specify.

          Enter dashes when using this method. For example, if you have a mask that uses ###-####-## and you enter 0000, you will not get any matches. You must enter 000- or 000-0 to get matches, where the first four digits in the account number are zeros.
        - "Contains" finds any value that contains what you have entered.
        - "Wildcard" searching uses % for any string that follows what is entered. The "_" only replaces a single character.
        - "Exact Match" must contain everything you enter. There cannot be additional characters before or after what was entered. If you are not sure of the exact wording, choose “Contains”.

    d. Click **Search**. All GL Accounts that meet the specified criteria are displayed in the result grid.

    Based on the value specified in the Max GP GL Account Search field, the results grid displays the data in one page or across many pages. If there are more records than the default number of rows, CampusNexus Student displays:

- Number of records displayed.
- Total number or records matched.
- A Next button to display the next records matched.

e. Double-click the applicable row, or click **Select** to add the account details to the Debit Account or Credit Account field.

f. Click **Save**. CampusNexus Student saves all records for all campuses that use Great Plains, that contain both a valid Debit and Credit Account or both the Debit and Credit accounts are blank. An error message is displayed if any campus that uses Great Plains is using an incorrect Debit and/or Credit account.

The **Reset** button on the Search GP GL accounts form clears the fields for a new Search.

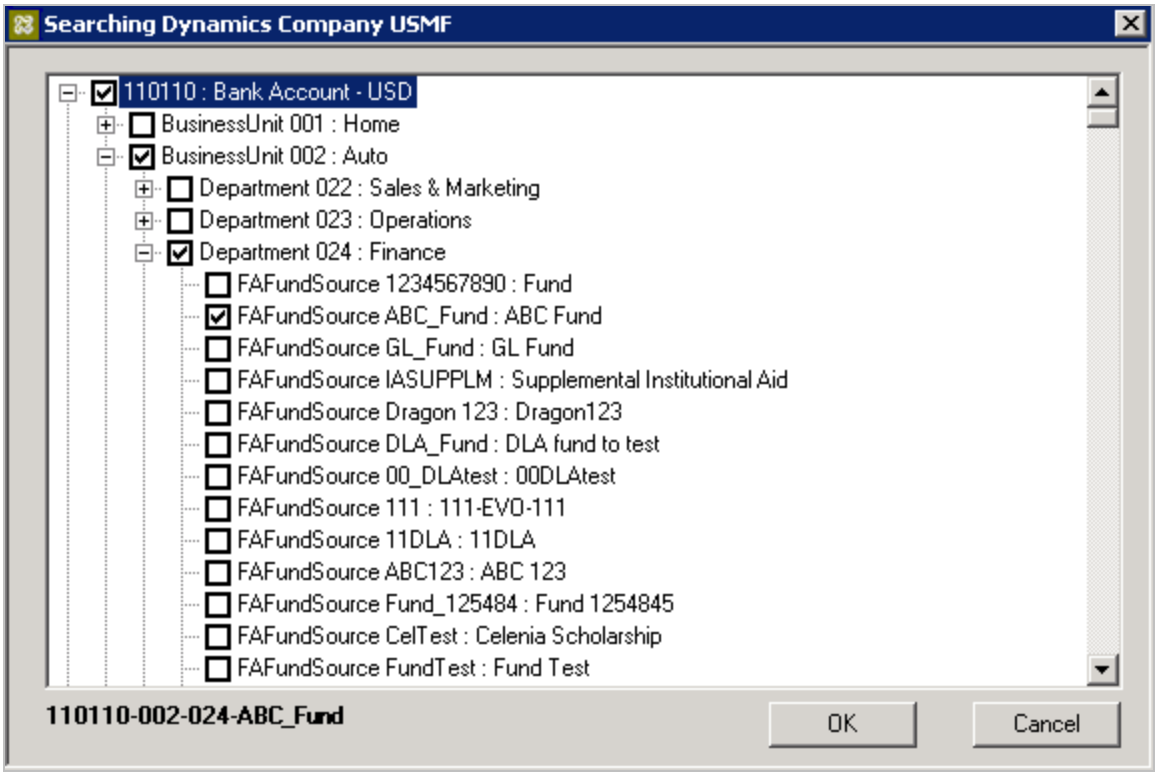
- If CampusNexus Student is integrated with CampusVue Finance, HR and Payroll or CampusNexus Finance, HR and Payroll, select a row and click the **Power Search** (for CampusVue Finance, HR and Payroll) or **Select GL Account** (for CampusNexus Finance, HR and Payroll) button to search for the appropriate GL Debit and GL Credit accounts.
    - If using CampusVue Finance, HR & Payroll, select the appropriate Ledger Account and click **OK**.
    - If using CampusNexus Finance, HR & Payroll, select the appropriate dimension attribute and click **OK**.

Note

- Your permissions in the accounting system determine which GL accounts you can view and select in CampusNexus Student.
- The Main account node can be displayed at any level in the account hierarchy. This is based on the account structure setting that is configured in Microsoft AX. For information about this setting, your administrator must see Microsoft AX Help.

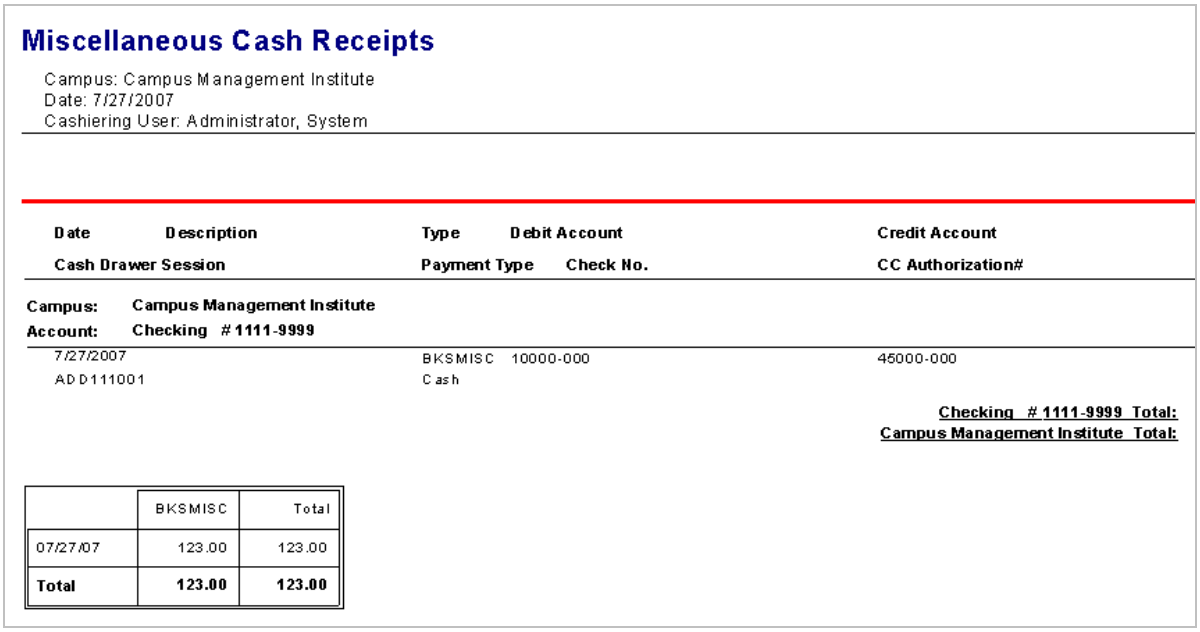
When you click **Save** after selecting the account, the system validates your selection against the account structure setting in Microsoft AX. This validation also occurs when transactions are released to

G/L.



13. Click **Save**. CampusNexus Student displays a confirmation message after saving the transactions. Click **OK**.
14. Click **Print** to print a list of the displayed transactions.

    The Miscellaneous Cash Receipts report is displayed.



Miscellaneous Cash Receipts

Campus: Campus Management Institute
Date: 7/27/2007
Cashiering User: Administrator, System

Date	Description	Type	Debit Account	Credit Account
Cash Drawer Session		Payment Type	Check No.	CC Authorization#
Campus:	**Campus Management Institute**			
Account:	**Checking # 1111-9999**			
7/27/2007		BKSMISC	10000-000	45000-000
ADD111001		Cash		

Checking # 1111-9999 Total:
Campus Management Institute Total:

	BKSMISC	Total
07/27/07	123.00	123.00
Total	**123.00**	**123.00**

To view the data in Excel spreadsheet format, from the Report Viewer in the upper left corner of the Miscellaneous Cash Receipts Report, select Excel > Export to Excel .

15. You can view report sorted by campus, transaction code, and date range by navigating to **Reports > Student Accounts >** Miscellaneous Cash Receipts.

Post Charges

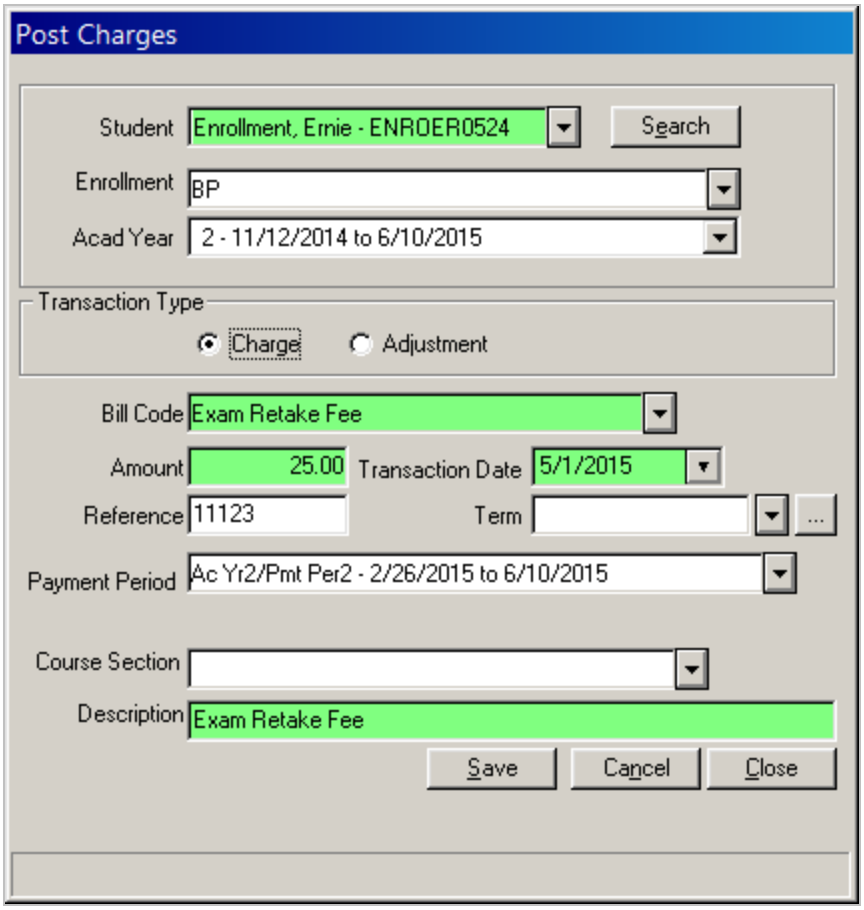
The Student Accounts Department uses this form to post charge transactions to students' accounts receivable. When you post charges to the main student ledger, the transaction code list will only include codes that are not associated with a subsidiary. Adjustment transactions can also be posted from this form.

If you use any of the posting options–payments, charges, or refunds–and the Posting Flag is set to "Current Campus", you can only post to an enrollment at the "Current Campus". If you try to post transactions for another campus, a message indicates that you are not signed into the campus and posting is not allowed. If the Posting Flag is set to "Any Campus", you can post transactions for a student at any campus.

If transaction code permissions are used, only transactions that the staff member may process appear in the **Bill Code** field.

To post a charge or adjustment transaction:

1. Select a student.
2. Navigate to **View > Student Accounts > Ledger Cards > Post Charges**.
   - OR -
   Navigate to **Daily >Student Accounts > Post Charges**. The Post Charges form is displayed.



3. Select the **Student** for whom the transaction is to be posted. Select from the list of recent students or search for the student.
4. Select the **Enrollment**.

5. Select an **Academic Year** to which the transaction is related.
6. Select the Transaction Type: **Charge** or **Adjustment**.

   Charges have an effect on the Student's Receivable account and some form of adjustment account. They show up in the Charges column on the Student Ledger Card.
7. Select a **Bill Code**. This list does not display transaction codes that have been linked to subsidiaries.
8. Enter the **Amount** of the transaction.

   The amount can be positive (debit adjustment) or negative (credit adjustment). In a Charge transaction, the amount is always entered as a positive (debit) value. In an Adjustment transaction, the amount can be positive (debit adjustment) or negative (credit adjustment). To enter a negative amount, type the minus sign (hyphen) in the amount field before you enter the amount.

   A negative value entered here results in a reduction of the student's account receivable and an increase in an adjustments account. It will appear in the Charges column of the student's Ledger Card. It does not ordinarily have any effect on the cash account or credit cards receivable account.
9. Enter or select the **Transaction Date**. The date cannot be earlier than the Minimum Transaction Date. (The Minimum Transaction Date is established for each campus to control the posting of transactions after accounting activity for a given period has been posted to the General Ledger.)
10. Optional: Enter a **Reference** value.
11. Select a **Term** to which the transaction belongs.

    CampusNexus Student checks for an Override Required Term indicator on the selected transaction code. This check is performed only if the Require Term Codes option has been selected in Setup > Student Accounts. If term codes are required on transactions and the selected transaction code has the Override Required Term indicator turned on, CampusNexus Student will not require a term code to post the transaction.

    Note: If the enrollment selected for posting a charge is registered in a program version this is non-term, the Term is no longer be required (but the fields is still be available).
12. If a payment period exists for an enrollment, use the **Payment Period** list to select the payment period which the transaction is linked.

    Note: If term is required and the selected enrollment has academic calendar 5 or 6, Payment Period is required instead of Term.
13. Enter a **Description**. The description defaults to the transaction description, but you can add to it or otherwise change it.
14. Click **Save** to post your transaction to the student ledger cards and clear the transaction fields.

    The student name, enrollment, academic year, transaction type, and date are not cleared in case you want to add another transaction for the same student. Be sure to change this data if you are entering data for another student.
15. Click **Close** to close the form.

Post Payments

You can post payments from students, third parties, and other fund sources, or apply payments to open items in the student ledger or subsidiary ledger. The Post Payments process can handle scheduled payments from various fund sources. Payments can be linked to enrollments, terms, and financial aid payment periods. See also Process Electronic Drafts and Posting Cash/Other Payment Plans (Reamortizing future payments).

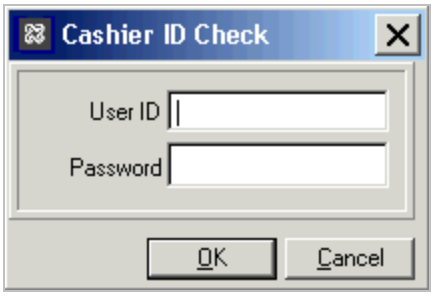
Use the Post Payments form to post a scheduled payment or unschedule a payments before they are posted. See Campus Financial Aid - Auto Stipends for information regarding Title IV funds and associated waivers.

To post payments:

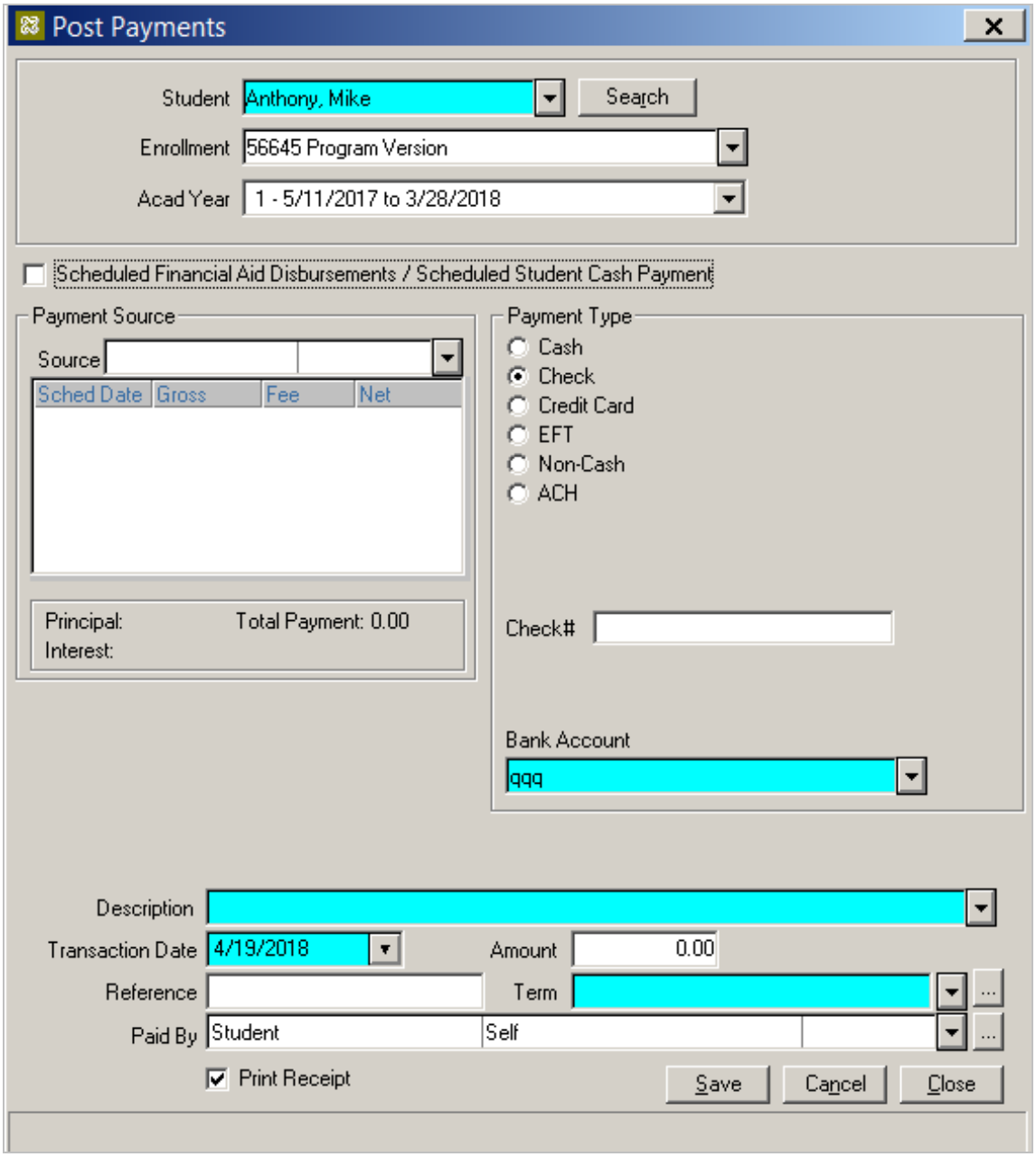
1. Click **Post Payments** on the student's ledger card.
   - OR -
   Navigate to **Daily > Student Accounts > Post Payments**. The Post Payments form is displayed.

   To post payments or charges for a subsidiary, click **Post Payments** on the Student Subsidiaries form or navigate to **Daily > Student Accounts > Post Payment**. For more information, see To post payments or charges to a subsidiary.

2. If the Cashiering feature is enabled, only users defined as cashiers can post payments. The Cashier ID Check form is displayed.

   Enter the cashier **User ID** and **Password**, and click **OK**. CampusNexus Student validates the information and, if a match is found, proceeds to the Post Payments form.



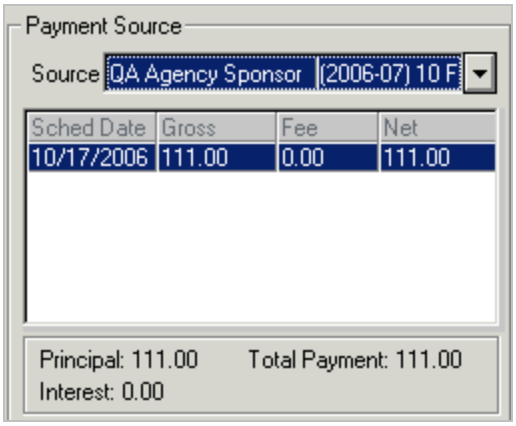
3. Select the **Student** for whom the payment applies. Select from the list of recent students or search for the student.
4. The **Applicant/Enrollment** field is populated automatically. Accept the default or choose another value from the list.
5. Select the **Academic Year** to which the payment applies.
6. The **Payment Period** combo box is displayed for program versions that can use it (program versions with academic calendars 1, 5, and 6). When Academic Year is selected, this combo box dynamically filters out academic years other than the selection. If the Academic Year field is cleared, all payment periods are available for selection. If no payment periods exist, the combo box is not displayed.

Conversely, when Payment Period is selected, the Academic Year is populated automatically. If Academic Year is modified after Payment Period is selected, this field is cleared and validated during save.

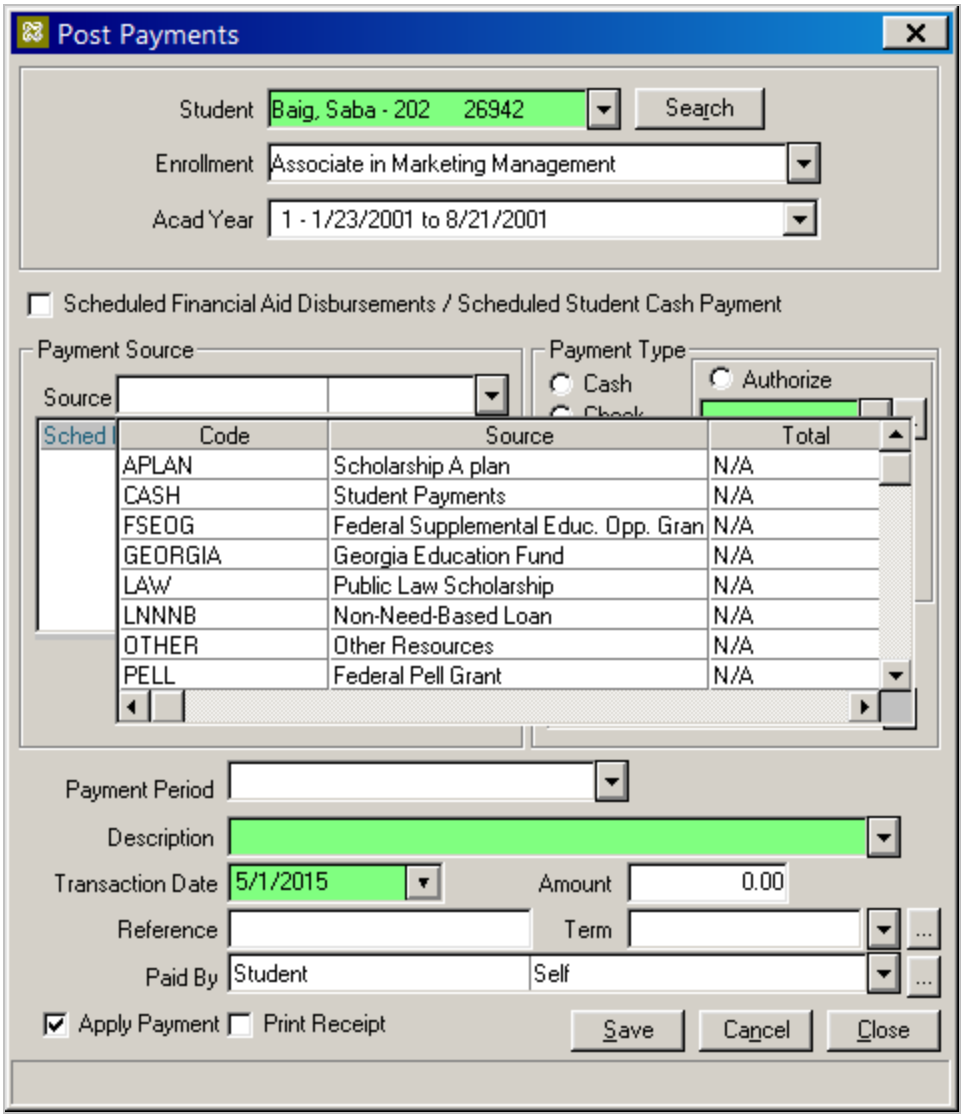
The notation for Payment Periods is `A<n>|P<m>` where `<n>` is the academic year sequence number and `<m>` is the payment period sequence number.

7. If the incoming payment is scheduled, select **Scheduled Financial Aid Disbursements/Scheduled Student Cash Payment**. The student's scheduled (unpaid) financial aid fund sources appear in the **Source** combo box.
   - If you select a fund source that is deactivated for an award year and campus, a message is displayed in red and you cannot continue processing the payment.
   - If any of the award year's fund sources are active, the fund source is displayed as a Source option.

   When a fund source and award year is selected from the Source list, the following information is displayed under the Source field.



8. If the **Scheduled Financial Aid Disbursements / Scheduled Student Cash Payment** check box remains cleared, a list of fund sources is displayed for selection in the **Source** list.



When you select a fund source, the Unscheduled Payment form is displayed, and you can schedule a payment to be posted. Fund sources are listed only when the Allow Posting Directly to Ledger Card option is enabled to allow manual posting.

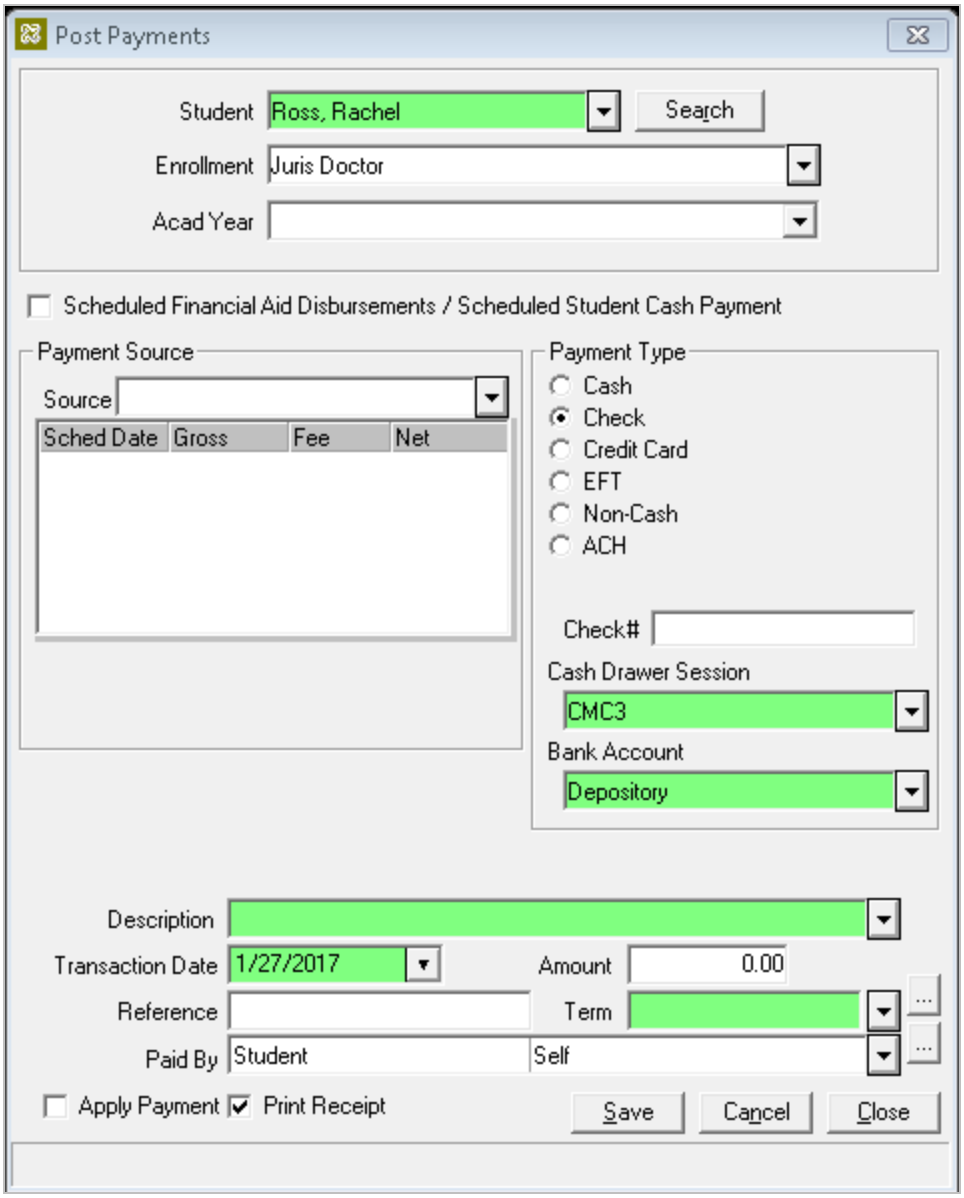
9. Select a **Payment Type**. The options are:

   - Cash
   - Check (default) - Enter a Check # when you select this option.
   - Credit Card
   - EFT (Electronic Funds Transfer)
   - Non-Cash (scholarships)
   - ACH

10. Select the **Cash Drawer Session**. Refer to Cash Drawers for detailed information.

    Note: If CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll and Cashiering is enabled, you can select a bank account to associate to the payment. All active bank accounts appear in the **Bank**

Accounts field drop-down list. This required field automatically populates with the default bank account for the selected payment type.



11. Select or enter the purpose of the payment in the **Description** field.
12. Select or enter the **Transaction Date** of the payment. This is the date that is considered in preparing the bank deposit.
13. Enter the **Amount** of the payment. You must enter a decimal point to separate pennies from dollars. If the amount is to be a debit to the student's account, enter a minus sign (hyphen) before the amount.
14. Optional: Enter any **Reference** data that you use to mark a payment.
15. Click or to select the **Term** to which this payment applies. (Whether you must select a term depends on a system setup flag controlled by your system administrator.)
16. In the **Paid By** list box, select the person who is making the payment. This list comes from the list of addresses in

the student's file.

If the person making the payment is not on the list, click . The Addresses form is displayed. Enter the new person and address. You can then select that person or entity as the "Paid By" option.

17. Select **Apply Payment** to apply the payment to a specific charge or multiple charges on the student's ledger. Refer to Payment Adjustments and Apply Payments to Charges for more information.

    Note: This option is available only if 'Auto Apply Using Hierarchy' is selected for 'How Should Payments Be Applied?' in Setup > Campus Locations > Add/Edit Campus > Accounting (tab).

18. Select **Print Receipt** to provide the student with a paper receipt for this transaction.

19. Click **Save**. CampusNexus Student checks the payment data and displays a message if editing rules have detected any problems. For example, the transaction date may be invalid if it is earlier than the earliest permitted transaction date.

    Note: If the fund source has been set up to apply payments to interest before principal, CampusNexus Student applies the payment to the interest of the selected scheduled payment followed by the principal. Additionally, CampusNexus Student applies overages to the interest of subsequent payments followed by the principal until the overage is exhausted.

20. Click **Cancel** to stop the posting transaction.

21. Click **Close** to close the form.

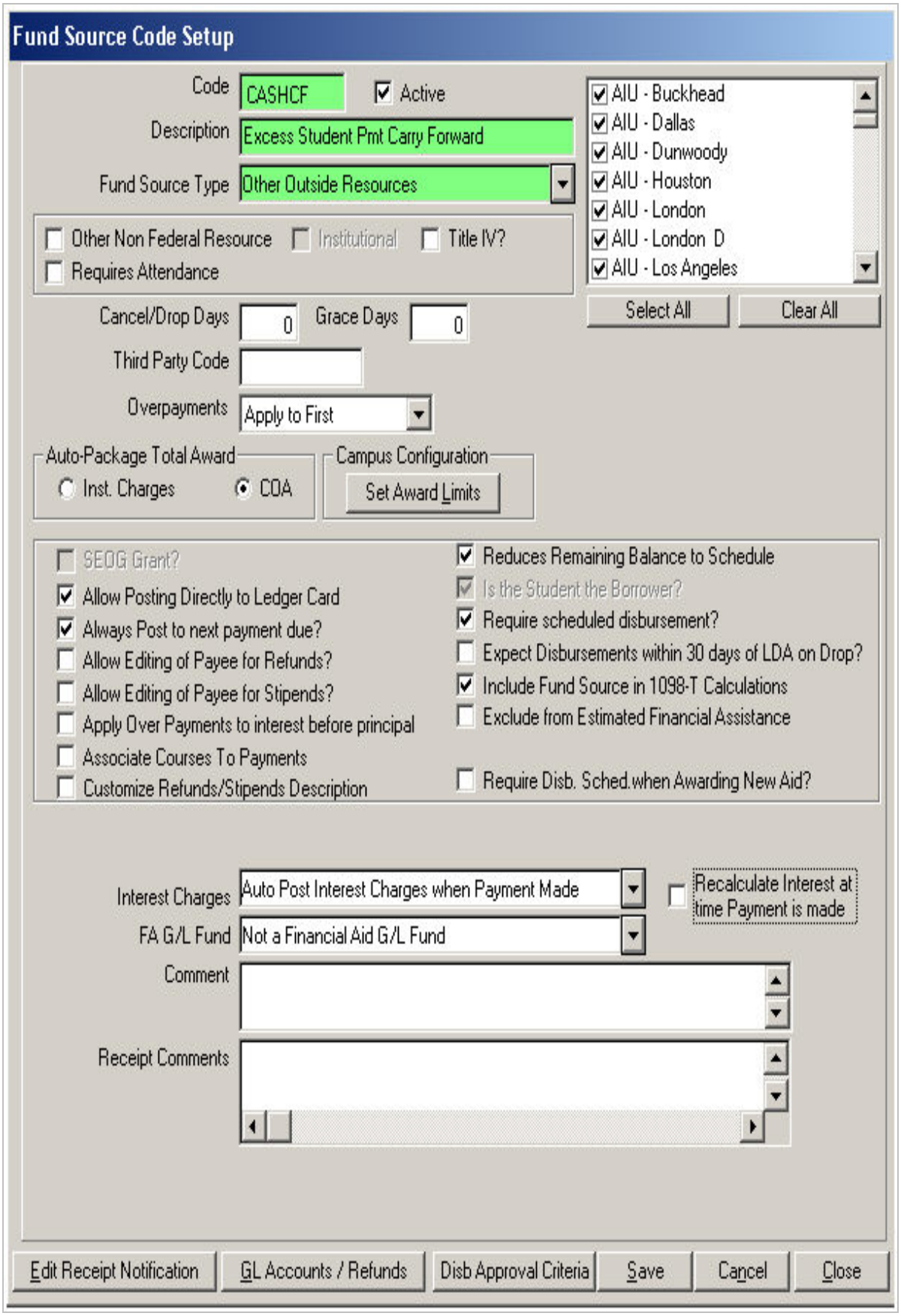
Posting Cash/Other Payment Plans (Reamortizing future payments)

Reamortizing future scheduled payments is necessary when you need to post a payment for a student and the amount paid is different than the expected amount. This includes receiving a scheduled payment that is less or more than the expected payment.

When you post a payment with an amount that is different than the scheduled payment amount, CampusNexus Student reamortizes and rebuilds the student's future payment schedule.

To have the student's payment plan reamortize and rebuild the remaining scheduled payments correctly when a payment is received that is different (over or under) than the expected scheduled payment, the following settings are necessary on the Fund Source Code Setup form.

1. The student's fund source type selected is **Cash-Other**.
2. The **Auto Post Interest Charges when Payment Made** is selected from the Interest Charges drop-down list.
3. Clear the **Recalculate Interest at time payment is made** check box or confirm that it is NOT selected.
4. Clear the **Apply over Payments to interest before principal** check box or confirm that it is NOT selected.
5. Select **Apply to First** for the Overpayments list.


Fund Source Code Setup
Code
CASHCF
Active
Description
Excess Student Pmt Carry Forward
Fund Source Type
Other Outside Resources
Other Non Federal Resource
Institutional
Title IV?
Requires Attendance
AIU - Buckhead
AIU - Dallas
AIU - Dunwoody
AIU - Houston
AIU - London
AIU - London D
AIU - Los Angeles
Select All
Clear All
Cancel/Drop Days
0
Grace Days
0
Third Party Code
Overpayments
Apply to First
Auto-Package Total Award
Inst. Charges
COA
Campus Configuration
Set Award Limits
SEOG Grant?
Allow Posting Directly to Ledger Card
Always Post to next payment due?
Allow Editing of Payee for Refunds?
Allow Editing of Payee for Stipends?
Apply Over Payments to interest before principal
Associate Courses To Payments
Customize Refunds/Stipends Description
Reduces Remaining Balance to Schedule
Is the Student the Borrower?
Require scheduled disbursement?
Expect Disbursements within 30 days of LDA on Drop?
Include Fund Source in 1098-T Calculations
Exclude from Estimated Financial Assistance
Require Disb. Sched.when Awarding New Aid?
Interest Charges
Auto Post Interest Charges when Payment Made
Recalculate Interest at time Payment is made
FA G/L Fund
Not a Financial Aid G/L Fund
Comment
Receipt Comments
Edit Receipt Notification
GL Accounts / Refunds
Disb Approval Criteria
Save
Cancel
Close

This configuration keeps the interest that is charged to the student consistent with what was initially calculated when the payment plan was first built.

6. **Post a Payment in Sequence for Fund Source Type of Cash/Other**

   When posting a payment against a payment schedule for a fund source type of cash/other, and the payment is for a future payment rather than the current payment or is a past due payment, CampusNexus Student does not allow the payment to process.

   Note: This doesn't mean that students cannot prepay. Early payments are still permitted and applied to the current payment in the payment plan. A computation of accrued interest is stored with the student's payment plan whenever the actual payment amount received is less than the expected interest payment amount, where the Accrued Interest Amount = (Total Accrued Interest - Actual Payment Received) + Previous Accrued Interest Amount. At the time a payment is received, any outstanding accrued interest amount is fulfilled before applying the payment to any outstanding interest or principal amounts.

   Example: A student owes $100 in accrued interest but makes a payment before the next scheduled payment is due (the student is at the Bursar's office even though the student knows that $250 is due next week). The interest accrued for this payment schedule is $40. The total Accrued Interest Amount = (80-140) + 40 = 60 + 40 = $100.00. Therefore, $100 is the student's accrued interest amount. However, even though the student just paid $140, CampusNexus Student is only displaying that the student paid $100 since $40 equals the accrued interest amount and, even though this amount is stored in CampusNexus Student, it is not displayed for the student or bursar/FA advisor to view (as $100 being applied to the accrued interest amount).

   Additionally, the interest charge posted to the student's ledger will contain both the accrued and payment interest received in this transaction. Therefore, using the example above, $100 + payment interest for a total of X will be posted to this student's ledger.

   As mentioned above regarding a past due payment, at the time of a late payment, the past due scheduled payment records will be zeroed out. This is done to ensure that any refunds can be accounted for accurately. The total amount received less any accrued interest payment will be applied to the current payment in the payment plan with the amounts applied to both interest and principal payment amounts.

   Again, from the example given above, the total amount received from this student of $140 - $100 (the accrued interest) = $40 which will be applied to the current payment in the payment plan (with the amounts applied to both interest and principal payment amounts for this student).

7. If the **Restrict student scheduled payments based on Graduation date** check box is selected under Setup > Campus Locations > Add/Edit (button) > Allow (tab), the last scheduled payment does not go beyond the student's graduation date.

   Note: When configuring a payment schedule for a fund source type of cash/other and the payment frequency is set to the number of days between payments, the number cannot exceed 365 days. See Cash-Other Source Form.

Audit Features

The audit features for Student Accounts include:

- CampusNexus Student stores the name of the payee on each refund record, stipend record, and subsidiary refund so that it can be retrieved for reporting purposes.
- CampusNexus Student audits changes to the payee for refunds and stipends. Auditing occurs from the time the refund or stipend is scheduled to the time the refund or stipend is processed. The date changed, time changed, and the user who made the change are audited.
- Payee changes are audited for subsidiaries.

- Payee information for a stipend can be edited regardless of the fund source associated with the stipend. The payee changes are audited for all stipends.
- Your ability to edit a payee for a refund is dependent on the fund source associated with the refund. The payee changes are audited only for the fund sources that allow the payee to be changed.
- You can sort on different columns of the grids available in the Process Refunds/Stipends wizard.
- A student account administrator can define that the Reference information is printed on the check, below the address, or on the stub, or in both places.
- A student account administrator can view the ID of the user who scheduled the refund/stipend using the Ledger Card, Transaction Detail button.
- CampusNexus Student stores the user ID of the user who scheduled the stipend so that it does not get overwritten by the user ID of the user who posted the stipend.

Credit Cards

You can post payments and refund using the Payment Type options "Credit Card". CampusNexus Student provides a means of capturing the necessary data about credit cards used by the student.

When you accept a credit card for a student payment, CampusNexus Student validates the credit card number only if the type is:

- A - American Express
- C - Carte Blanche
- D - Discover
- I - Diners Club
- M - MasterCard
- V - Visa

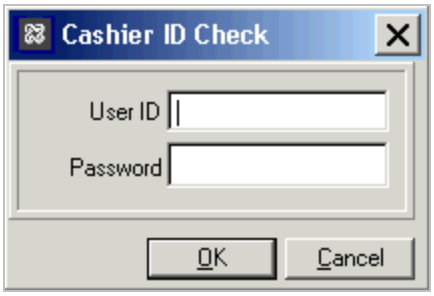
To set up web payments, see Campus Electronic Processing.

See also Refund Payments with a Credit Card, Payment Adjustments, and Payment Information.

To post a payment with a credit card:

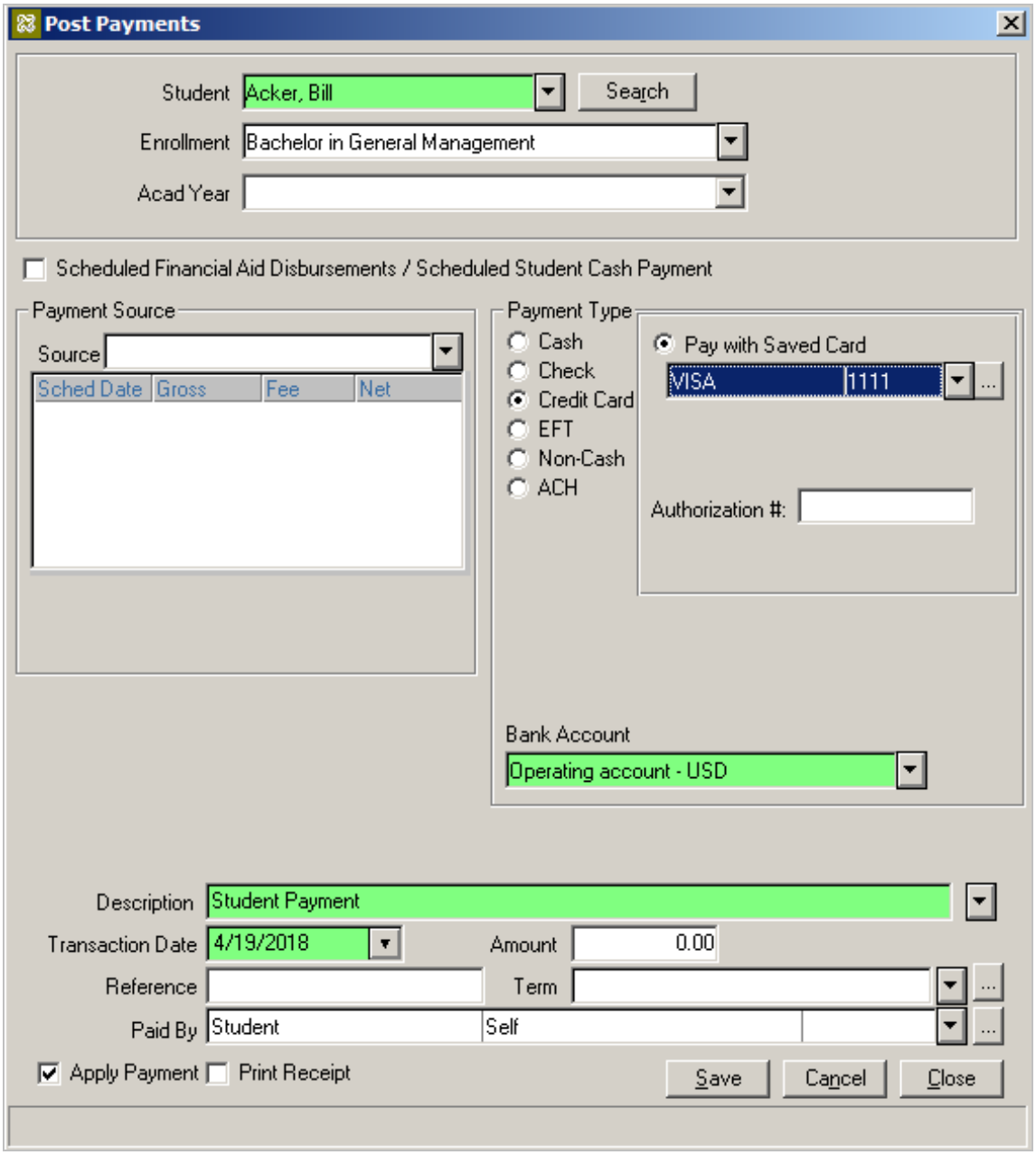
1. Click **Post Payments** on the student's ledger card.
   - OR -
   Navigate to **Daily > Student Accounts > Post Payments**. The Post Payments form is displayed.

   If the Cashiering feature is enabled, only users defined as cashiers can post payments. The Cashier ID Check form is displayed.



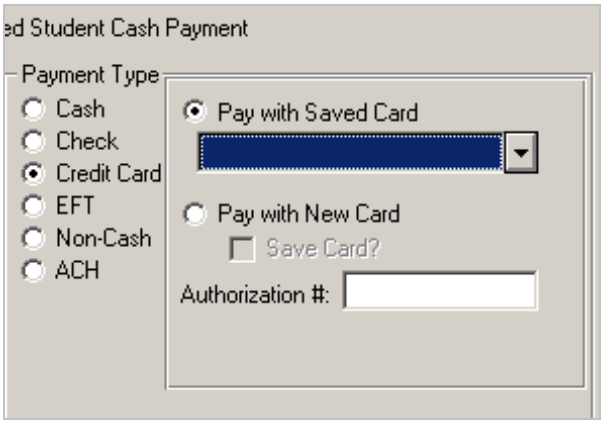
   Enter the cashier **User ID** and **Password**, and click **OK**. CampusNexus Student validates the information and, if a match is found, proceeds to the Post Payments form.

   Note: If the student's campus is not configured to Verify Credit Card Payments Posted Using CampusNexus Student (Campus Information - Electronic Processing Tab), the form only has a single option for Credit Card Payment Type: **Pay with Saved Card**.



Note: If the student's campus is configured to Verify Credit Card Payments Posted Using CampusNexus Student (Campus Information - Electronic Processing Tab), there are two options for Credit Card Payment Type:

- **Pay with Saved Card**
- **Pay with New Card**



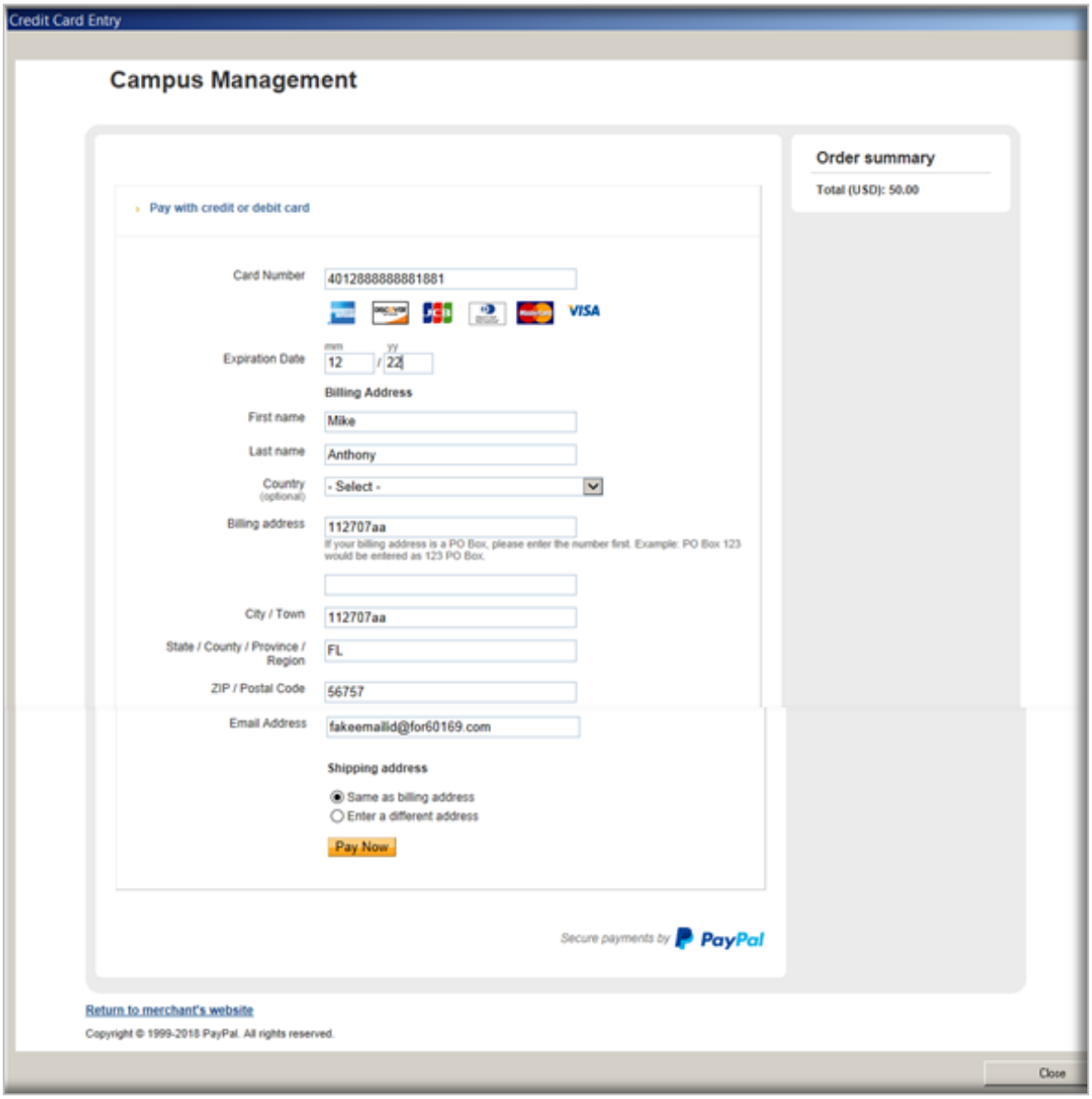
2. Select the **Student ID** for whom the payment is to be posted.
3. Select the **Enrollment** and **Academic Year**.
4. Select the **Scheduled Financial Aid Disbursement / Scheduled Student Cash Payment** option if applicable.
5. Select the source of the payment from the **Source** list.
6. Select **Credit Card** as the Payment Type. The credit card authorization fields are displayed.
7. When the **Pay with Saved Card** option is selected, you can select the saved credit card from the drop-down list.

   When the **Pay with New Card** option is selected, you will be redirected to the payment gateway provider's hosted page to enter credit card information to complete the transaction.
8. Complete the remainder of the Post Payment form as you would for any other payment type.
9. Click **Save** to save the payment to the student's ledger card.

   If you have selected the Pay with New Card option, you are redirected to the payment gateway provider's hosted page to enter credit card information to complete the transaction.

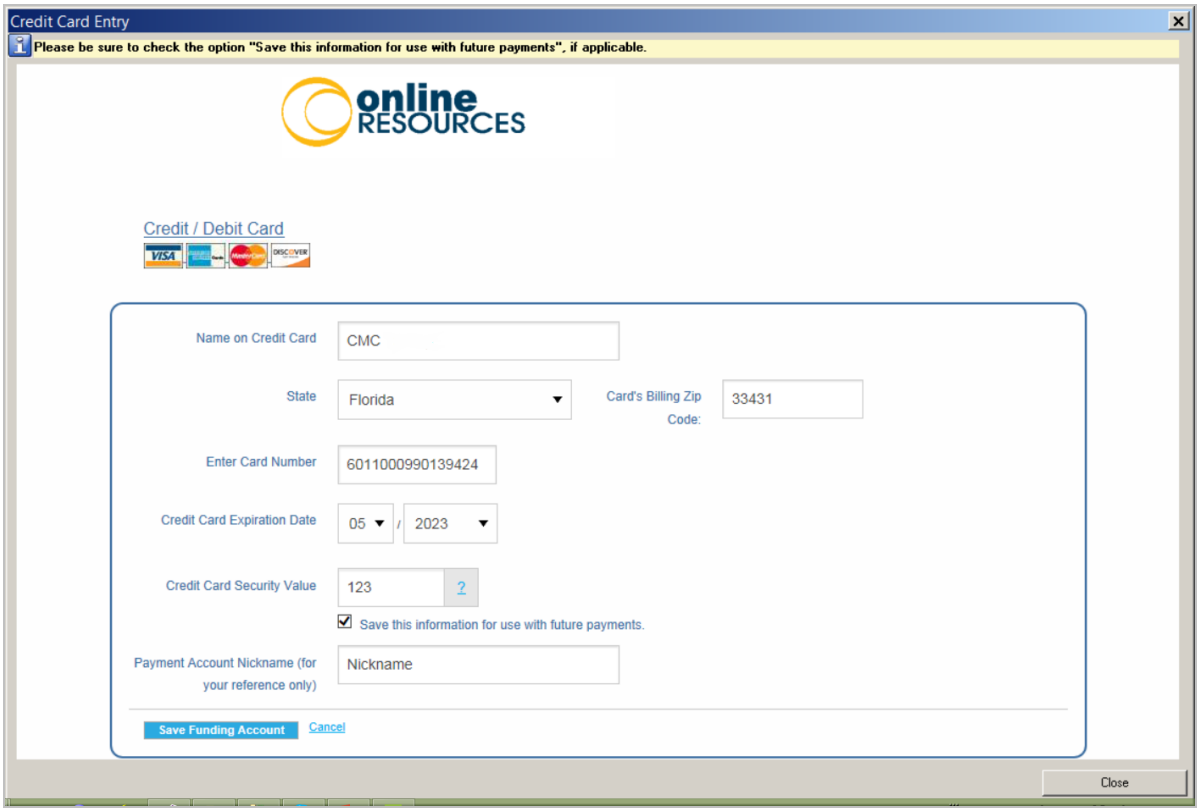
   Note: Selecting the **Save Card?** check box will save the new card to the database as Active for future transactions. If you do not save the card, the card will be saved but will be marked as Inactive and won't be available for selection for future transactions.

   PayPal



Details concerning properly configuring your PayPal Hosted Checkout page can be found here: PayPal Account Configuration

ACI



Note: When a credit card is added through a payment gateway provider's hosted page, a unique ID is stored in the CampusNexus Student database instead of the actual credit card number. This unique ID is used to communicate with the payment gateway provider to identify the student's correct credit card for processing credit card transactions.

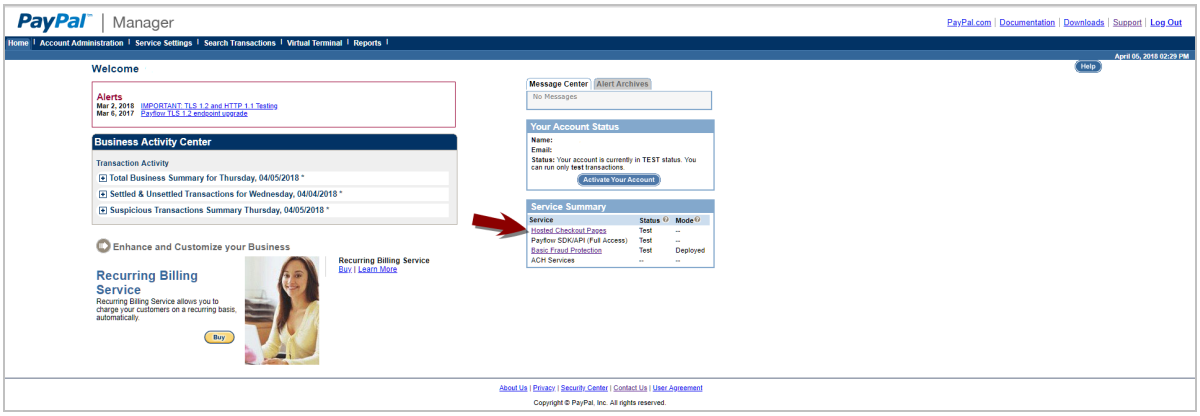
To post refunds with a credit card:

Open the **Post Refunds** form from the student's ledger card or from the Post Individual Refunds path. CampusNexus Student prompts for a cashier ID check. Specify your user name and password. If valid, CampusNexus Student allows you to schedule refunds through the Student Accounts - Refunds form.

PayPal Account Configuration

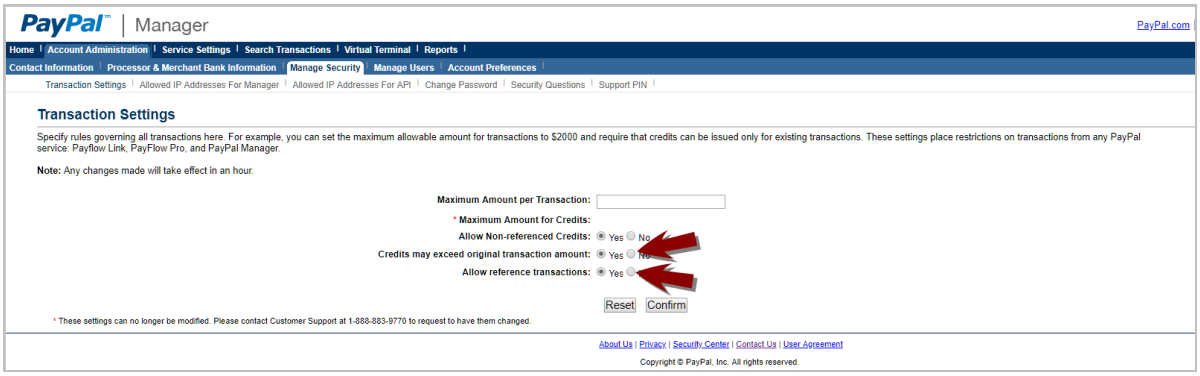
To ensure your PayPal payment gateway provider functions properly in CampusNexus Student, complete the following steps to configure your PayPal account:

1. Ensure you have the Hosted Checkout Pages feature enabled for the PayPal account. If the account does not have this service, you must contact PayPal to have this Hosted Checkout Pages feature turned on.



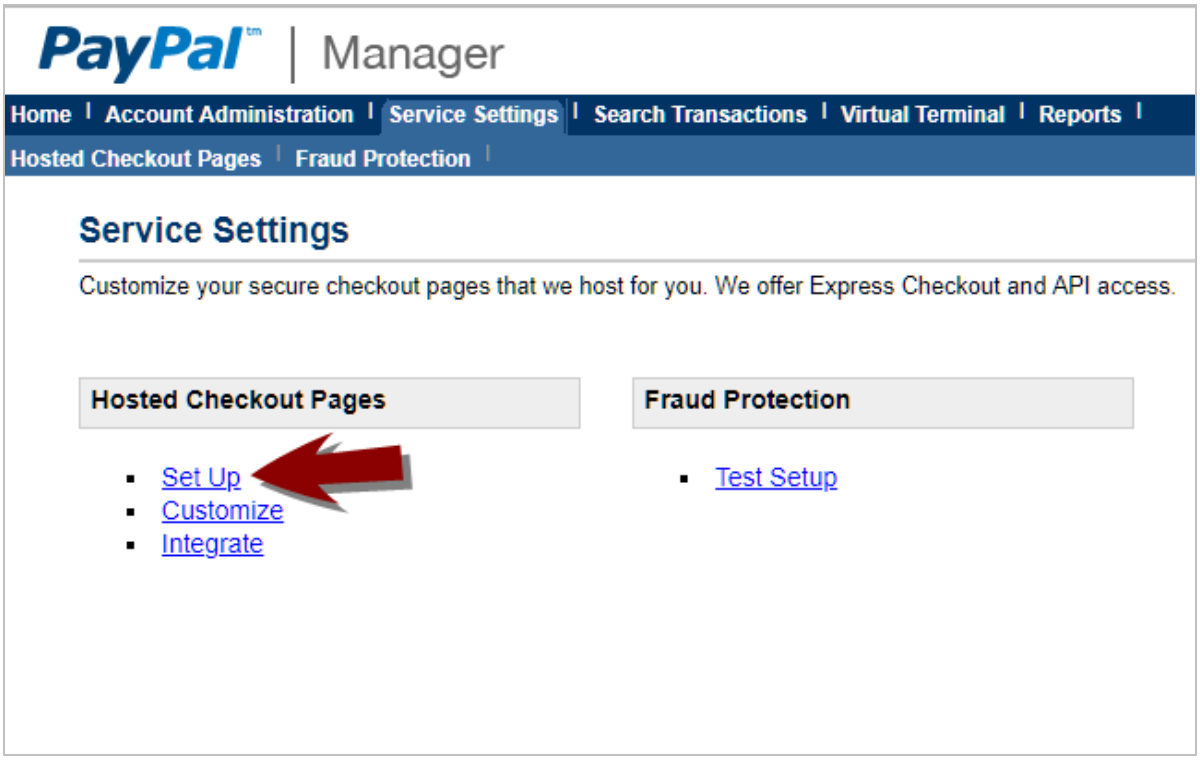
2. In PayPal Manager under Account Administration > Manage Security > Transaction Settings, the following settings must be set to **Yes**.
   - **Credits may exceed original transaction amount**
   - **Allow reference transactions**

   If the radio buttons cannot be selected, you must contact PayPal and request this setting change is made.

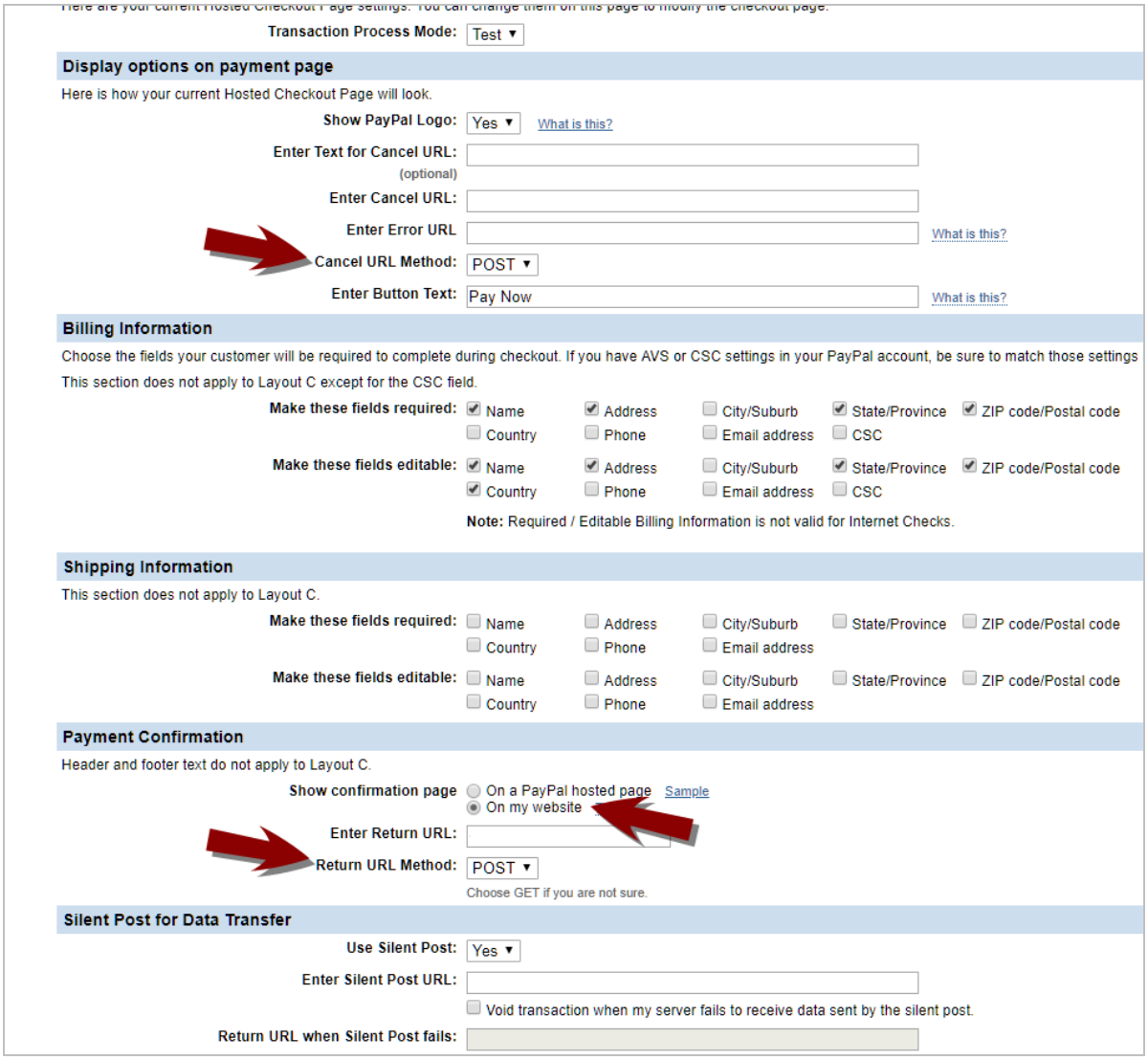


3. Once the Hosted Checkout Pages feature is turned on, the following settings must be configured for the hosted page though PayPal Manager:

   Under Service Settings > Under Hosted Checkout Pages, click **Set Up**.



- The **Cancel URL Method** must be set to POST.
- The **Return URL Method** must be set to POST.
- Setting the **Show Confirmation Page** option to **On my website** bypasses the verification page on the hosted page. If you wish to avoid this, you must configure the confirmation page to let the students know that they must click **Return** in order to finish the process.


Here are your current Hosted Checkout Page settings. You can change them on this page to modify the checkout page.
Transaction Process Mode: Test
Display options on payment page
Here is how your current Hosted Checkout Page will look.
Show PayPal Logo: Yes What is this?
Enter Text for Cancel URL: (optional)
Enter Cancel URL:
Enter Error URL What is this?
Cancel URL Method: POST
Enter Button Text: Pay Now What is this?
Billing Information
Choose the fields your customer will be required to complete during checkout. If you have AVS or CSC settings in your PayPal account, be sure to match those settings
This section does not apply to Layout C except for the CSC field.
Make these fields required: Name Address City/Suburb State/Province ZIP code/Postal code Country Phone Email address CSC
Make these fields editable: Name Address City/Suburb State/Province ZIP code/Postal code Country Phone Email address CSC
Note: Required / Editable Billing Information is not valid for Internet Checks.
Shipping Information
This section does not apply to Layout C.
Make these fields required: Name Address City/Suburb State/Province ZIP code/Postal code Country Phone Email address
Make these fields editable: Name Address City/Suburb State/Province ZIP code/Postal code Country Phone Email address
Payment Confirmation
Header and footer text do not apply to Layout C.
Show confirmation page On a PayPal hosted page Sample
On my website
Enter Return URL:
Return URL Method: POST
Choose GET if you are not sure.
Silent Post for Data Transfer
Use Silent Post: Yes
Enter Silent Post URL:
Void transaction when my server fails to receive data sent by the silent post.
Return URL when Silent Post fails:

Post Individual Refunds

You can post individual refunds to student ledger cards. You must specify to which fund source the refund applies. All payment and refund transactions require a bank account for posting. CampusNexus Student processes refunds for enrolled students and new lead students that have not enrolled yet.

If you use any of the posting options–payments, charges, or refunds–and the posting flag is set to Current Campus, you can only post to an enrollment at the current campus. If you try to post transactions for another campus, a message indicates that you are not signed into the campus and posting is not allowed. If the Posting Flag is set to Any Campus, you can post transactions for a student at any campus.

The refund posting procedure uses the Agency description when posting refunds to third-party agencies. The descriptions on the disbursement transaction and the refund transaction will match.

See also Ledger Card and Process Electronic Drafts.

Updating the Direct Loan Disbursement File

CampusNexus Student updates the direct loan disbursement file when a refund is posted to a student's ledger card. Each refund that is posted to a student's ledger card is reported to COD (Common Origination and Disbursement). CampusNexus Student determines if a row should be added to the direct loan disbursement table. A row will be added to the table if all of the following conditions are met:

- The fund source type of the refund is DIRSUB, DIRUNSUB, or DIRPLUS.
- The Use Direct Loan flag is set to true for the student's campus.
- A row exists in the FA Loan table where the Student Aid ID equals the ID for the FA for which the refund is being posted.

If Auto create Loan Period Orig. Changes when student Withdraws or Refund is posted? is activated, an origination change is created for the following reasons during the posting of the refund:

- An origination change record is created to reduce the Award Amount to exclude the gross amount of the refund posted.
- For a fully refunded disbursement, an origination change record is created to exclude that disbursement’s payment period from the Loan Period, if the disbursement is in a payment period after the initial payment period on the loan.

If there are pending origination changes for the Award Amount or Loan Period End Date that have not yet been sent to COD, they will be updated with the corresponding information from the posted refund record.

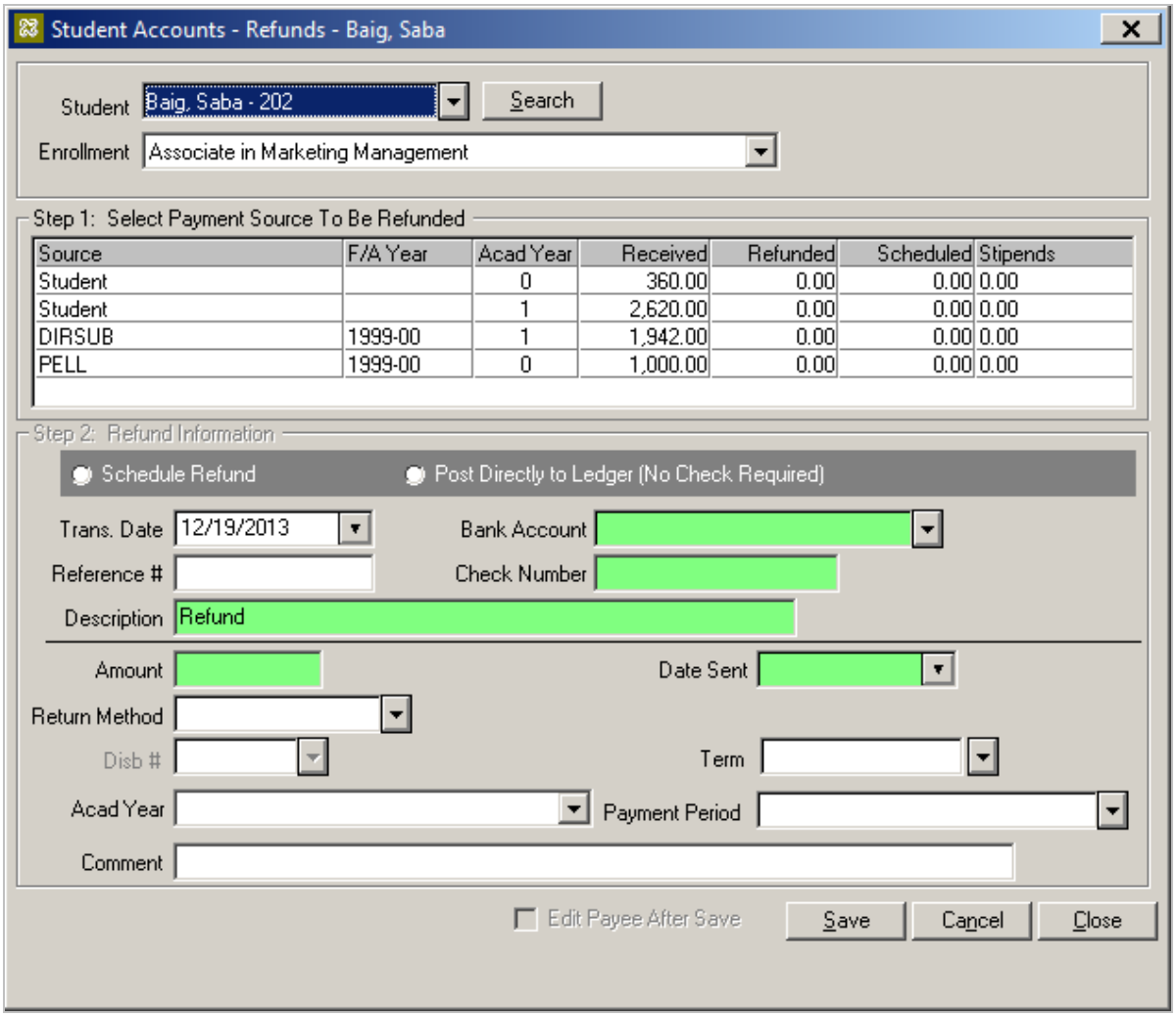
ACH Processing

CampusNexus Student updates the ACH export file when a refund is posted to a student's ledger card and the following applies:

- The fund source type of the refund is CASH.
- The Direct Deposit flag is set to true for the student's bank account.
- The student's institution uses ACH for refund/stipend processing.

To post a manual refund:

1. Navigate **Daily > Student Accounts > Post Refunds**. The Student Accounts - Refunds form is displayed.



2. Select the **Student** to whom the refund applies.
3. Select the **Enrollment** to which the refund applies.
4. Select the **Payment Source** to be refunded. If the selected fund source is deactivated, a message will appear in red and the refund may not be processed.

   If the Payment Source is Student, the Disb # field is disabled. If the Payment Source uses disbursements from an institution, the Disb # field is enabled.
5. Select **Schedule Refund** or **Post Directly to Ledger (No Check Required)**.
   - Select Schedule Refund to add a refund and not post it to the ledger by selecting. CampusNexus Student will add the refund to the "check to print" list via Print Checks functions (see Process Refunds/Stipends). This allows you to schedule refund checks outside of performing a refund calculation. The Schedule Refund option is enabled only if you have Schedule Refund permission.

- Select Post Directly to Ledger when a check has already been issued and you want to record it in CampusNexus Student. The transaction will be posted to the ledger card, but no check will be scheduled. The Apply Refund check box (if present) becomes enabled and can remain selected or be cleared, as needed. The Post Directly to Ledger (No Check Required) option is enabled only if you have Post Refund permissions.

6. Depending on your selection above, enter the **Trans. Date**, **Bank Account**, **Reference #**, and **Check Number**.

   When CampusNexus Finance, HR & Payroll is integrated with CampusNexus Student, the Check Number is required.

7. The **Refund's Description** that was entered when adding or editing the fund source is displayed if one was configured, otherwise the system-defined Refund Description is displayed. You can **override** the Description here. CampusNexus Student will add the fund source and financial aid year to the description entered. The maximum length of the field is 100 characters which includes the addition of the system defined values.

8. Enter the **Amount** to be refunded. Negative refund amounts are not permitted.

   Some refunds are mandatory. Institution are required to refund the funds, and they have to work directly with the student to recover a loss associated with a stipend. CampusNexus Student will allow a refund to be issued to a student for an amount greater than what was paid by the student on the ledger card. If there is a credit balance remaining after all money has been returned, the credit balance may be posted as a refund due to the student.

9. Enter the **Date Due**. Note that this date cannot be any earlier than the Minimum Transaction Date set in the Campus Information setup.

10. In the **Disb #** field, select or enter the disbursement number against which the refund is given. The disbursement number contains an amount that may or may not be equal to the amount being refunded. If the amount being refunded is more than already scheduled for the disbursement, the remainder will be drawn from other disbursements associated with the payment source and enrollment. This applies to DIRSUB, DIRUNSUB, DIRPLUS and Pell only, since the system does not currently create COD adjustments for TEACH refunds.

    A. If the amount is associated with a disbursement number, and the amount is more than the total already set for the disbursement, you are prompted to decide if you want to associate the excess refund amount with other paid disbursements.
    B. If you click No, the message is no longer displayed and you can specify a different total in the Amount field.
    C. If you click Yes, the Refund Assignment - Fund Source form is displayed.
    D. You can then adjust the amounts to be refunded against a disbursement number by changing the number in the Refund Amt. column.

    When a refund associated with a disbursement number is posted, CampusNexus Student flags an adjustment record to be sent to COD. This adjustment will contain the disbursement number that is associated with the refund. This information is exported to COD as an adjustment record with the correct disbursement number and sequence number.

11. Select the **Return Method** (Check, Master Check, EFT, Net, ACH).

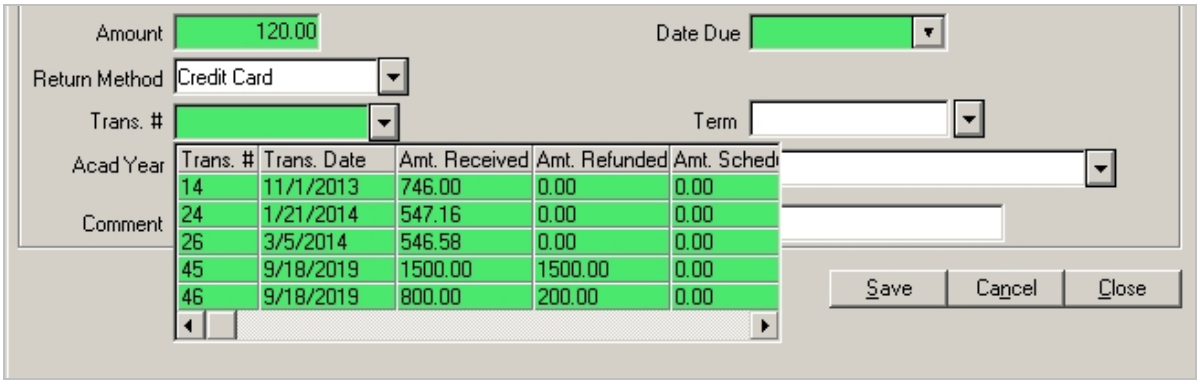
    If the Schedule Refund option is selected, the return method will default to ACH if the campus is configured for an ACH processor for refunds, and the student has at least one checking/savings account configured for direct deposit. ACH is allowed only if the fund source is CASH. If Post Directly to Ledger is selected, the ACH option will be disabled, even if these ACH conditions are met.

    When CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll the following conditions apply:

- When a subsidiary refund transaction is created, Return Method = 'Master Check' is not available.
- When a subsidiary refund transaction is created with Return Method = 'Check', the transaction cannot be voided in CampusNexus Student.

12. Select the Credit Card Type. This field is available when DIRSUB, DIRUNSUB, DIRPLUS and Pell are NOT selected. See also Credit Card and credit card batch setup.

    Note: When Credit Card is selected as the **Return Method** and the student's enrollment campus is configured to use ACI as the payment gateway provider, a required drop-down field appears under the **Trans #** field so you can select a specific transaction. All available credit card transactions associated with the selected payment source are listed with details such as the Transaction #, Transaction Date, Transaction Amounts (Received, Refunded, Scheduled), etc... Since the drop-down field is required, you must select a specific payment to post the refund against to proceed.



13. Enter the **Term**, **Academic Year**, **Payment Period**, and **Comment**.

    The Payment Period field is available (visible on the form) for program versions that can use it (program versions with academic calendars 1, 5, and 6). When Academic Year is selected, this combo box will filter out academic years other than the selection. If the Academic Year box is cleared, all payment periods will be available for selection. If no payment periods exist, the combo box will not be displayed.
    Conversely, when Payment Period is selected, the Academic Year will be auto populated. If Academic Year is modified after Payment Period is selected, this field will be cleared and validated during Save.

    The notation for Payment Periods is `A<n>|P<m>` where `<n>` is the academic year sequence number and `<m>` is the payment period sequence number.

14. Select **Edit Payee After Save** to change the payee information when processing a refund check.

    The Edit Payee After Save check box is disabled if the staff member does not have Edit Payee on Schedule Refund permissions.

15. Select or clear the **Apply Refund** as needed.

    This check box is visible and enabled only if the campus setting for 'How Should Payments Be Applied?' (Setup > Campus Locations > Edit (campus) > Accounting tab) is 'Manual/User Applied' **and** 'Post Directly to Ledger' is selected.

16. Click **Save** to save your refund. The refund will be posted to the student's ledger card.

When a Pell refund is posted to the student's ledger card and the school uses the Pell Processing system, CampusNexus Student will ask the following question: *"Mark this refund as Ready To Send to RFMS?"* If you answer Yes, CampusNexus Student finds the corresponding record in the FA Refund table. If the Pell grant disbursement status is not equal "S - Sent", the status code is replaced with "R - Ready to Send".

If the fund source for the refund being posted is a Direct Subsidized, Unsubsidized, or PLUS loan, a record will be written to the file containing the history of disbursements and refunds sent to COD. On the Direct Loan form, you would see these history records on the Received and Refunds tab under "Disbursements at COD". The View Refunds button is also displayed; users can click View Refunds to note what amounts are being refunded and what disbursements are being associated with those refunds.

After a refund selected for a single disbursement has been saved, it is displayed in the Student Ledger Card form as a refund, with the disbursement number noted in the Description field. It is also displayed in the Transaction Detail form with the total of the refund in the Amount field and the disbursement number associated with the amount in the Disb # field.

After the refunds across multiple disbursements have been saved, they appear on the Student Ledger Card form as a single refund amount with a Description field displaying the Disbursement numbers. It is also displayed in the Transaction Detail form with the total of the refund in the Amount field and the disbursement numbers associated with the amount in the Disb # field.

The disbursements will also properly appear on the Disbursements at COD section of the Rcvd Refund/Stipend tab of the Fund Source form.

Audit Features

The audit features for Student Accounts include:

- CampusNexus Student stores the name of the payee on each refund record, stipend record, and subsidiary refund so that it can be retrieved for reporting purposes.
- CampusNexus Student audits changes to the payee for refunds and stipends. Auditing occurs from the time the refund or stipend is scheduled to the time the refund or stipend is processed. The date changed, time changed, and the user who made the change are audited.
- Payee changes are audited for subsidiaries.
- Payee information for a stipend can be edited regardless of the fund source associated with the stipend. The payee changes are audited for all stipends.
- Your ability to edit a payee for a refund is dependent on the fund source associated with the refund. The payee changes are audited only for the fund sources that allow the payee to be changed.
- You can sort on different columns of the grids available in the Process Refunds/Stipends wizard.
- A student account administrator can define that the Reference information is printed on the check, below the address, or on the stub, or in both places.
- A student account administrator can view the ID of the user who scheduled the refund/stipend using the Ledger Card, Transaction Detail button.
- CampusNexus Student stores the user ID of the user who scheduled the stipend so that it does not get overwritten by the user ID of the user who posted the stipend.

Post Individual Stipends

You can post individual stipends to student ledger cards. When stipend schedules are set up, stipend disbursements are linked to packaged fund sources. When you select a student, enrollment, and academic year, CampusNexus Student displays the related stipend schedule. If the net amount received from the fund sources is less than zero, CampusNexus Student displays the message: *"The stipend amount to post exceeds the net amount received for the financial aid this stipend disbursement is linked to. This transaction cannot be posted."*

Scheduling and Disbursement

Using setup options under Setup > Student Accounts and Setup > Campus Locations, your institution can enforce rules when scheduling and disbursing stipends. The institution can allow stipends to be scheduled whether the institutional charges exceed the amount packaged. The institution can also allow stipends to be posted and issued to the student before the funding is received on the ledger card.

The following options can be configured using the Student Accounts Settings form and the Campus Information form (Stipends subtab):

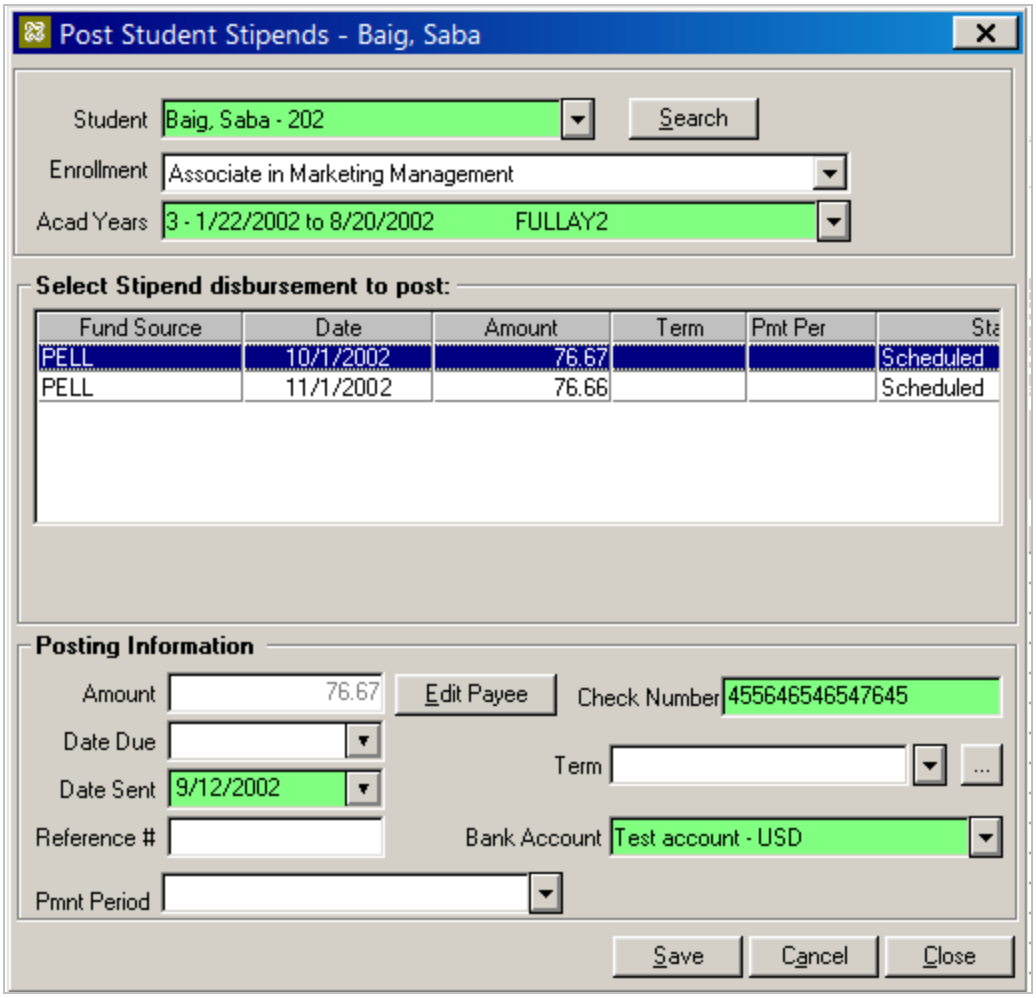
- Schedule Stipends: *Prevent scheduling stipends when institutional charges are greater than amount packaged?*
- Disburse Stipends: *Prevent issuing stipend disbursements when funding has not been received?*

If the setting is Yes (default for both options), CampusNexus Student displays a message and prevents you from scheduling the stipend. If the setting is No, CampusNexus Student allows you to schedule the stipends.

See also Ledger Card and Process Electronic Draft.

To post individual stipends:

1. Navigate to **Daily** > **Student Accounts** > **Post Individual Stipends**. The Post Student Stipends form is displayed.



2. Select the **Student** to whom the stipend will be paid.
3. Select the **Enrollment** to which the stipend applies. The default is the most recent enrollment.
4. Select the **Academic Year** to which the stipend applies.
5. Select the **Stipend Disbursement to Post**.
6. Specify the **Date Due**. This date cannot be earlier than the Minimum Transaction Date set in the Campus Information record.
7. Specify the **Date Sent**.
8. Specify the **Reference Number**.
9. Click **Edit Payee** to change the payee information when processing a stipend check. This option is enabled only if you have Edit Payee on Scheduled Refund and Edit Payee on Scheduled Stipend permissions. If you select a stipend to post, and do not have Post Stipend permissions, the Posting Information section is disabled.
10. Specify the **Check Number**.

When CampusNexus Finance, HR & Payroll is integrated with CampusNexus Student, the Check Number is required.

11. Select the **Term** to which the stipend applies.

    When you select a stipend from the grid, the term defaults to the Stipend Schedule Term. You can override this selection. When you save, CampusNexus Student writes the selected term to the Stipend Schedule Term, Transaction Term, and Refund Term.

12. Select a **Bank Account** from which the check will be drawn.

    Note: The Stipend's Description that was entered when adding or editing the fund source is gathered internally, if one was configured, otherwise the system-defined Stipend's Description is gathered and stored. This value is displayed on the student's ledger card for the fund source.

13. Click **Save**. CampusNexus Student posts the stipend and displays a confirmation message. Click **OK** to acknowledge the message.

14. Click **Close** to close the form.

Note: Since there are several places to access refunds and stipends in CampusNexus Student, multiple users might try to change one record at the same time. To prevent conflicts, CampusNexus Student locks the record being updated. If another user tries to access the record, a message indicates that the record is locked along with the name of the user. The lock is released when the user closes the form. In certain scenarios, a system administrator may need to clear a locked stipend or refund record. For more information, see Unlock Refunds/Stipends.

Audit Features

The audit features for Student Accounts include:

- CampusNexus Student stores the name of the payee on each refund record, stipend record, and subsidiary refund so that it can be retrieved for reporting purposes.
- CampusNexus Student audits changes to the payee for refunds and stipends. Auditing occurs from the time the refund or stipend is scheduled to the time the refund or stipend is processed. The date changed, time changed, and the user who made the change are audited.
- Payee changes are audited for subsidiaries.
- Payee information for a stipend can be edited regardless of the fund source associated with the stipend. The payee changes are audited for all stipends.
- Your ability to edit a payee for a refund is dependent on the fund source associated with the refund. The payee changes are audited only for the fund sources that allow the payee to be changed.
- You can sort on different columns of the grids available in the Process Refunds/Stipends wizard.
- A student account administrator can define that the Reference information is printed on the check, below the address, or on the stub, or in both places.
- A student account administrator can view the ID of the user who scheduled the refund/stipend using the Ledger Card, Transaction Detail button.
- CampusNexus Student stores the user ID of the user who scheduled the stipend so that it does not get overwritten by the user ID of the user who posted the stipend.

Transaction Search

This menu option displays a form that searches for ledger transactions (charges and payments) using various criteria. This is useful for users that are cleaning up data conversion or who want a quick query to find all transactions of a particular type.

Once the items have been listed, you may be able to do a transaction adjustment from this form. Transactions cannot be adjusted after they have been released to the general ledger. The transaction date cannot be changed to a date prior to the Minimum Transaction Date for your campus.

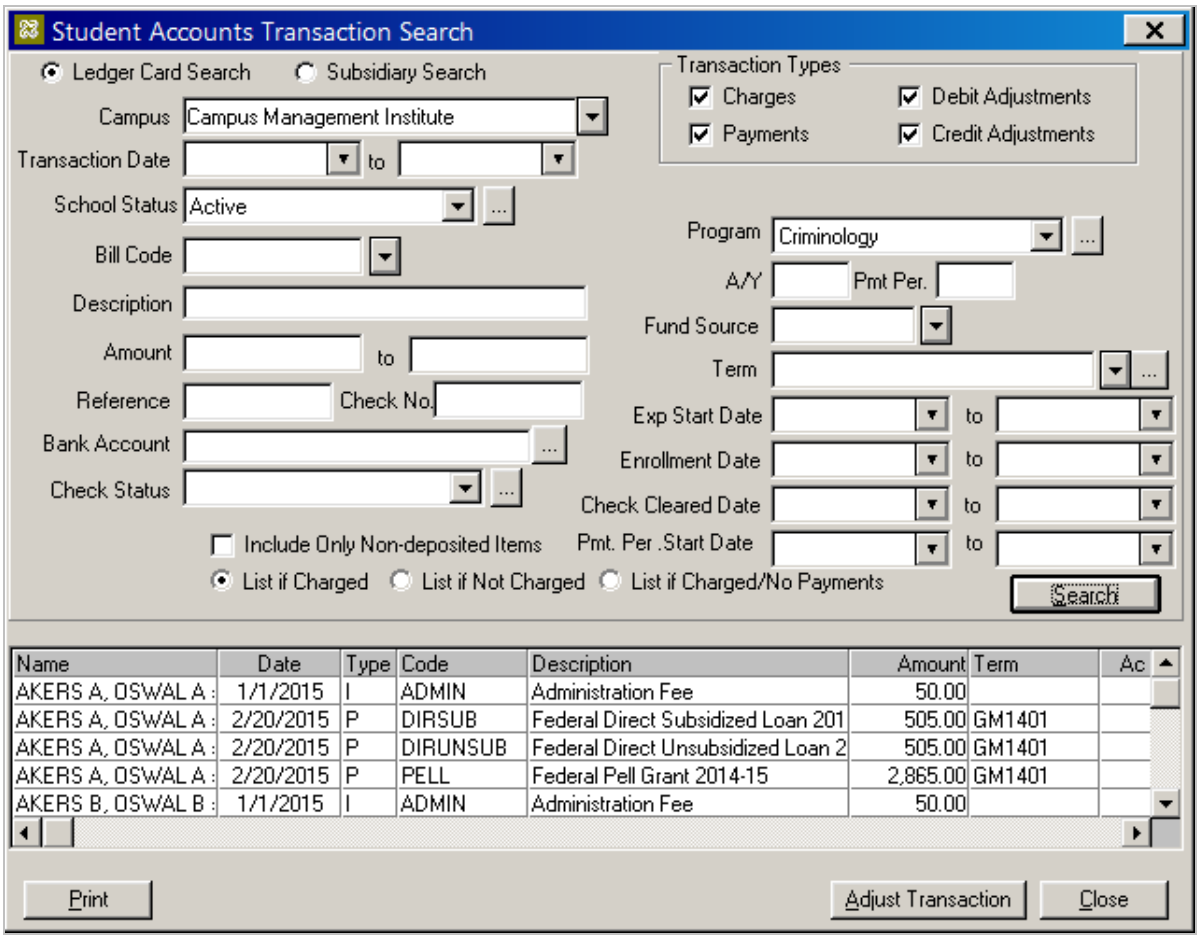
If you select a student (transaction item on the grid), you can click on any item on the student bar, and the information is displayed for the selected student.

If transaction code permissions are used, staff member security levels for the transaction are checked when the Adjust Transaction button is selected.

The Fund Source list contains only the fund sources that the staff member may *View*. The Adjust Transaction button is only enabled if the staff member has Edit Payment, Edit Schedule Refund, or Edit Scheduled Stipend permissions for the selected fund source.

To perform a transaction search:

1. Navigate to **Daily** > **Student Accounts** > **Transaction Search**. The Transaction Search form is displayed.



2. Select **Ledger Card Search** to search transactions from the student ledger card, or select the **Subsidiary Search**

to search for transactions from the subsidiary ledger.

3. Enter your search criteria.

Field Descriptions

Field	Description
Campus	Select the campus to which the required transactions are related.
Transaction Date (Range)	Enter the From and To dates for the transactions you want. • If you want only the transactions for a single day, enter the date in both fields. • If you want transactions beginning with a given date, enter the date in the first date field and leave the second date field blank.
School Status	Select one or more student statuses. Click ... to see all available statuses.
Bill (Transaction) Code	If you want transactions for a single bill (transaction) code, type the desired code or select it from the list.
Description	The Description field finds all transactions that contain the string entered. If you specify "Pell" (without quotes), the search will look for any transaction having Pell in the Description field.
Amount (Range)	Enter a low amount and a high amount if you want transactions with a range of amounts. • If you are looking for only one amount, enter it in both fields. • If you are looking for any amount higher than a given value, enter it in the first amount field. • If you are looking for an amount lower than a given amount, enter it in the second amount field.
Reference	Enter a reference value to look for transactions that match it.
Check Number	Enter a check number to look for transactions that match it.
Transaction Types	Select or clear the transaction types to look for charges, payments, debit adjustments, and/or credit adjustments.
Cash Drawer Session	Enter a Cash Drawer Session ID to search for transactions having Cash Drawer criteria.
Program	Select a program to look for transactions that match. To select multiple programs, click ... .
Fund Source	Select a fund source to find all transactions related to it.

Field	Description
Term	Select a term to see all the transactions related to it. Users must select a term when the transaction is posted for it to show up on the search results list. They do not always take the time to relate transactions to specific terms. There is an option to require term codes on all transactions in Setup/Student Accounts.
Academic Year (A/Y)	Enter a number from 0 to the number of academic years a student can attain at your school.
Expected Start Date Range	Enter a range of expected student start dates to see all the transactions for students starting in the range.
Include Only Non-deposited items	Select the Include Only Non-deposited items check box to look for transactions that have not been deposited yet. Clear the check box is you would like deposited and non-deposited results.
Enrollment Start Date Range	Enter a range of enrollment student start dates to see all the transactions for students starting in the range.
Pmt. Per. Start Date	Enter a range of payment period start dates to see all the transactions for students with payment periods in the range.
Bank Account	Select one or more Bank Accounts associated with the transaction.
Include Only Non-deposited Items	Select this check box to see only the items that have not been deposited yet; otherwise leave this field blank.
List if Charged List if Not Charged List if Charged/No Payments	List all students who have received a charge. List only students who have not received a charge. List only the students that have not paid a charge.

4. Click **Search** to begin the search for the transactions that meet your criteria.
5. The Transaction grid displays the following information:

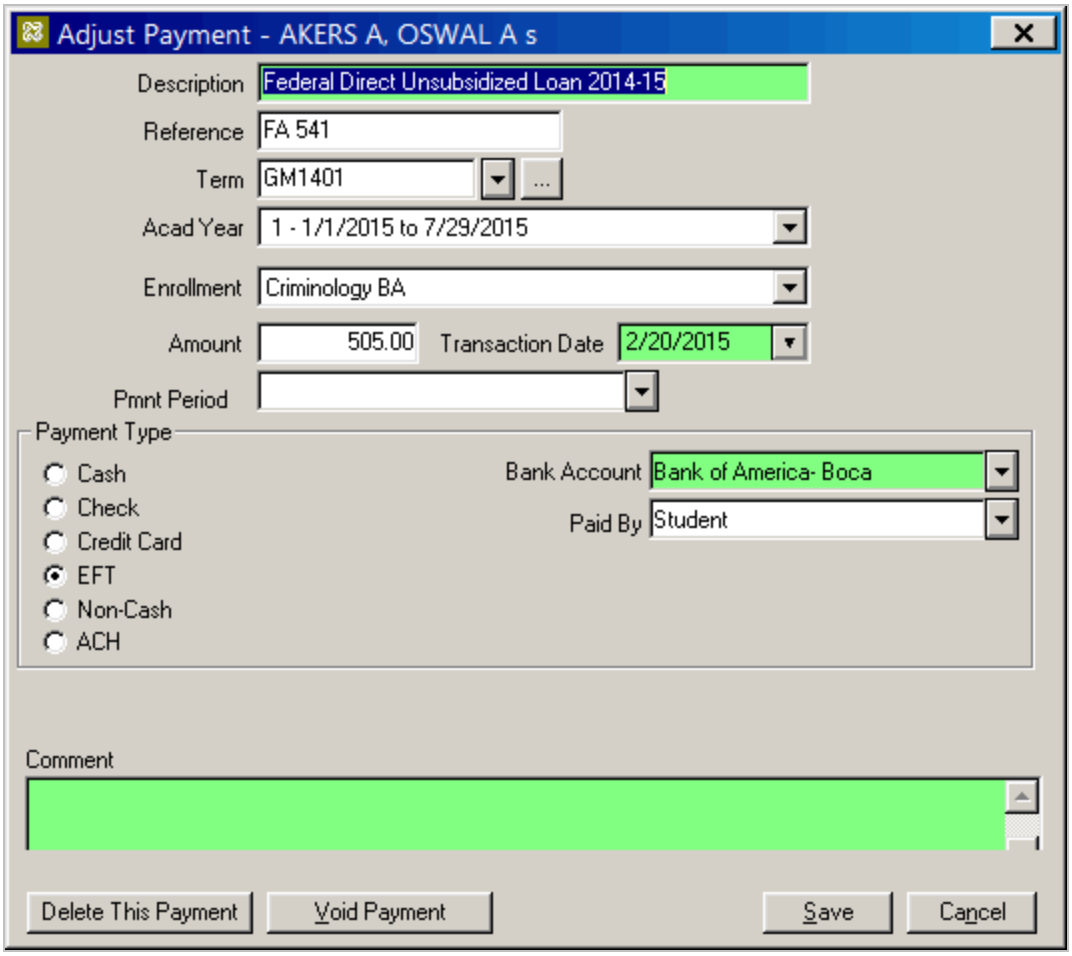
Field Descriptions

Field	Description
Name	The student to whom the transaction is related.
Date	The date of the transaction.
Type	The type of transaction. • **C** = Credits • **P** = Payments • **D** = Debits • **I** = Invoice
Code	The transaction code.

Field	Description
Description	The description of the transaction.
Amount	The amount of the transaction.
Term	The term to which the transaction is related.
A/Y	The academic year to which the transaction is related.

Click **Print** to get a report of the transactions returned by the search procedure. The report is the "Detail Transaction Register".

6. Select a transaction or payment on the grid and click **Adjust Transaction** to open the adjustment form.
7. Click **Search** to initiate the search for your requested transactions. It may take a few seconds to search the database so be patient. The transactions that fit the criteria you entered are displayed in the grid on the lower portion of the form.
8. If a transaction on the list must be adjusted, select it and click **Adjust Transaction**. The Transaction Adjustment form or the Adjust Payment form is displayed with the current data for the selected transaction or payment.



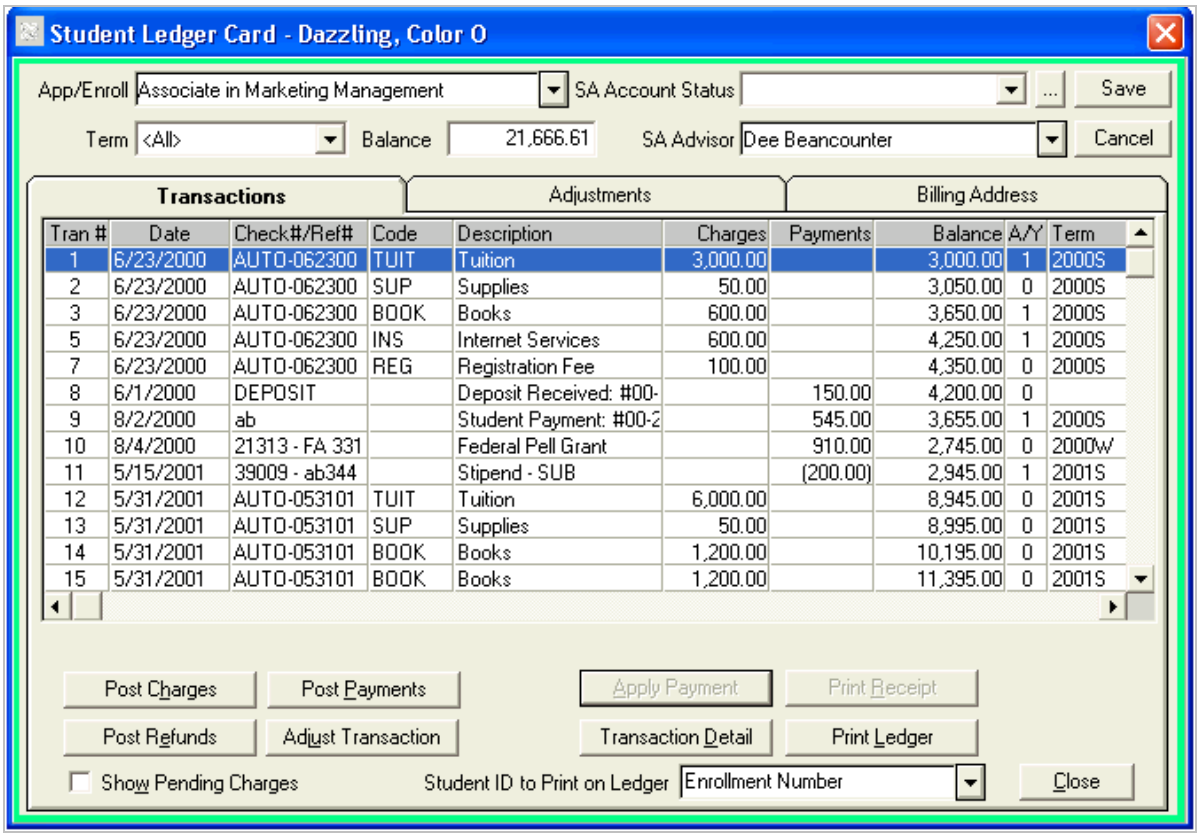
CampusNexus Student prevents the amount of a direct loan disbursement or refund from being edited if the disbursement or refund has been sent to Common Origination and Disbursement (COD).

If the amount field is edited and updated, the corresponding row in the Direct Loan Disbursements table is updated with the change. CampusNexus Student finds the row in the table and calculates the new disbursement gross amount, net amount, and fees.

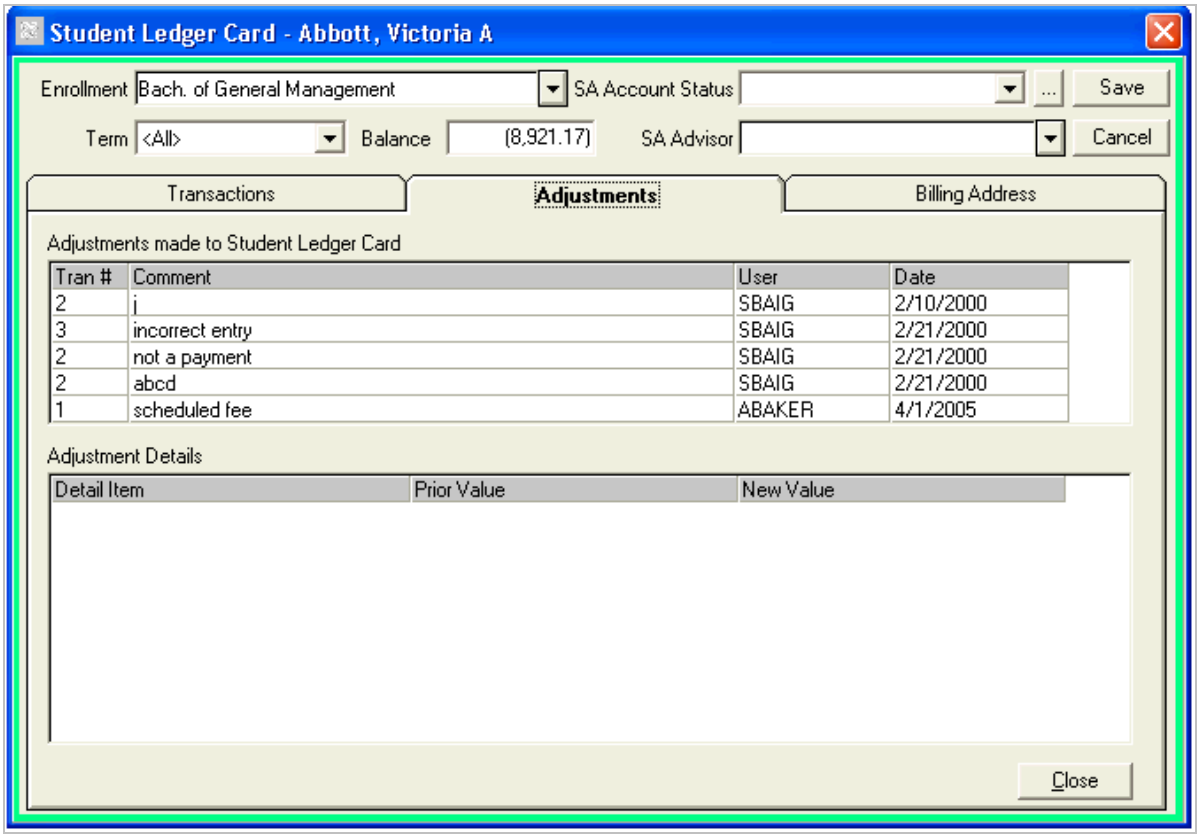
CampusNexus Student updates the direct loan disbursement file in the following cases:

- When adjusting the amount of a previously posted direct loan disbursement for a student.
- When deleting a previously posted direct loan disbursement from a student's ledger card.

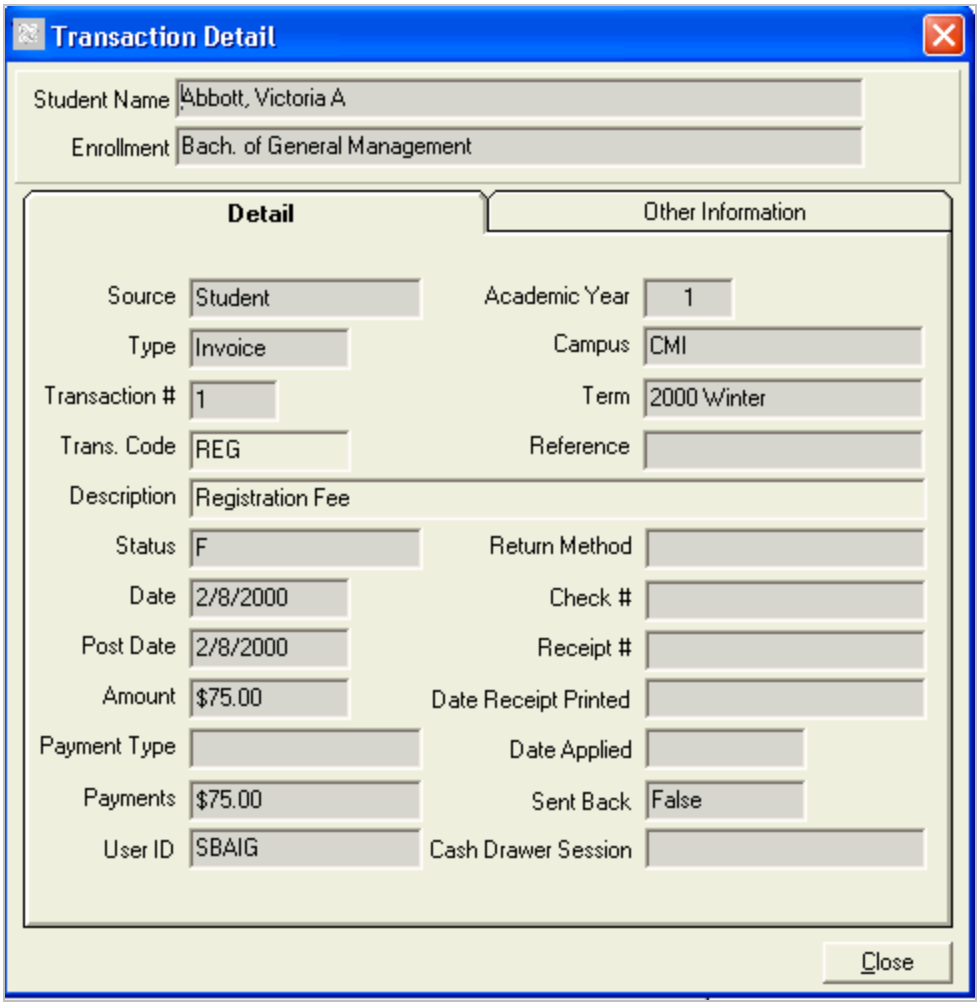
9. Edit the data for the transaction or payment to be adjusted. You are changing the selected transaction or payment. You are not entering an additional offsetting transaction. The transaction in its previous form will no longer appear on the student's ledger card. The adjusted form of the transaction will appear on the ledger card. There is, however, a record of the change. You can see it on the **Adjustments** tab of the student's ledger card. The illustration below shows the transaction after it has been changed.



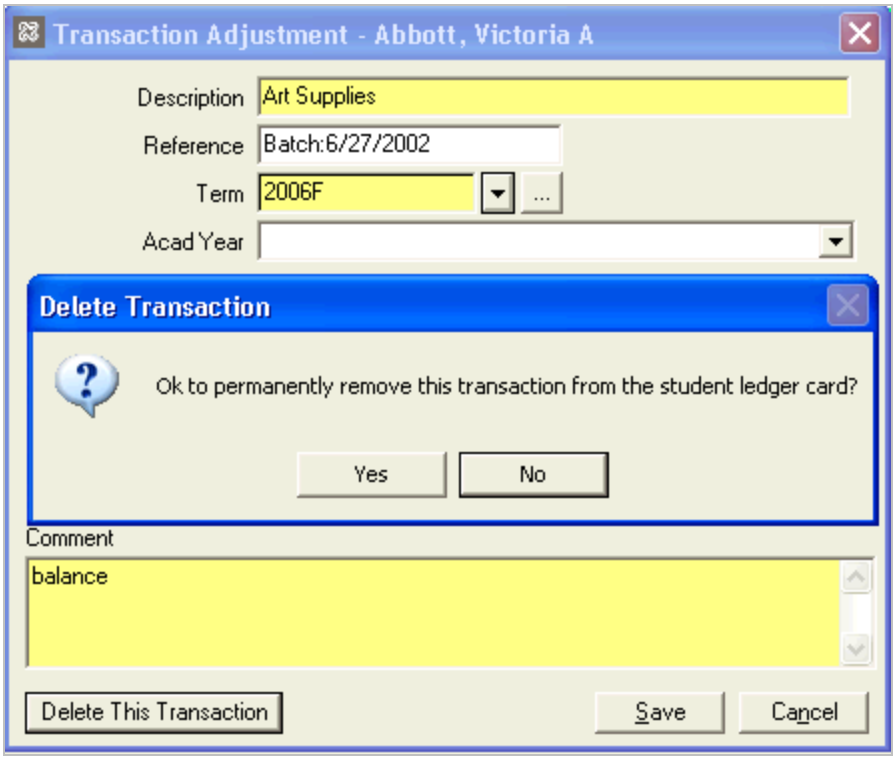
The illustration of the Adjustments tab on the ledger card shows the record of the changed transaction.



The Transaction Detail form shows the details of the transaction after the adjustment has been made.



10. Click **Save** to save any changes you have made to the transaction or payment.
11. Click **Delete This Transaction (or Delete This Payment)**to remove the charge or payment from the student's ledger card. CampusNexus Student displays a confirmation message.



12. Click **Yes** to confirm the deletion. The transaction or payment is permanently removed from the student ledger card. The Adjustments tab of the student's ledger card contains a record of the deletion.

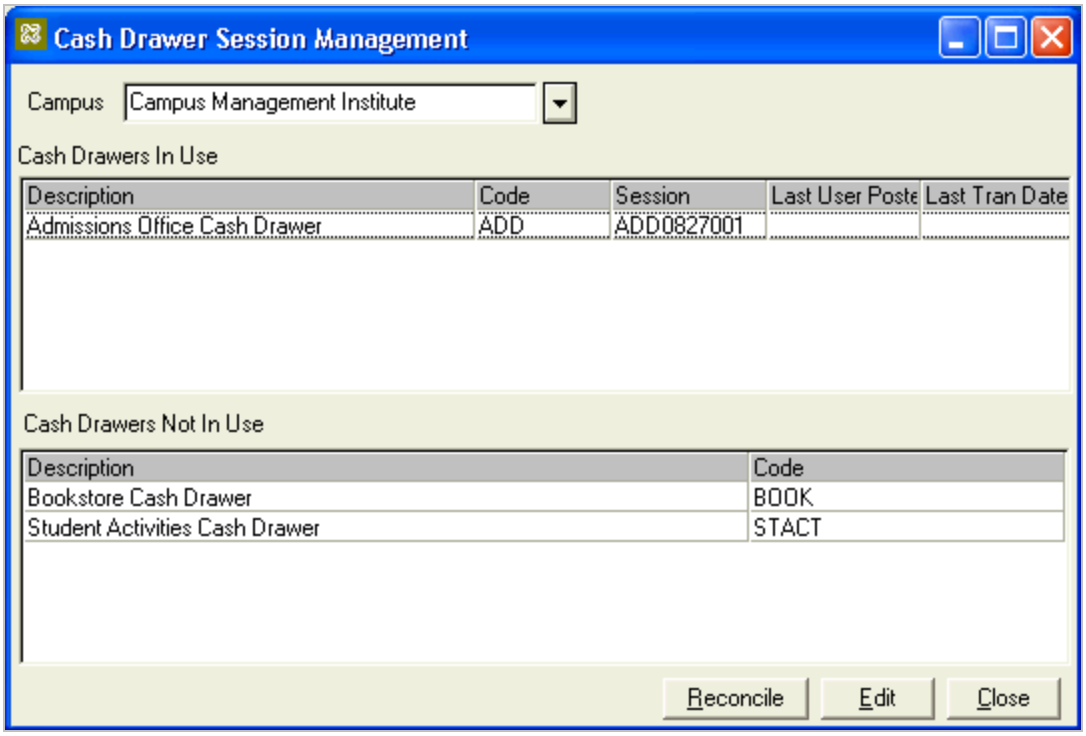
Cash Drawer Session Management

This feature enables authorized users to close and reconcile activity taking place in cash drawers throughout a campus or school. A Cash Drawer Session is a shift or other period during which one cashier opens a cash drawer and makes transactions. Typically, the cashier reconciles the drawer by adding up the receipts and including a calculator tape with the remittance. The administrator closes the drawer, formally reconciles the contents, and prepares a bank deposit. The Cash Drawer Session Management function also enables the authorized user to adjust transactions.

Cash drawers require the cashiering function to be enabled (Setup > Campus Information > Allow), staff members must be designated as cashiers, and the institution must have set up dedicated bank accounts for this purpose.

To perform management tasks with Cash Drawers:

1. Navigate to **Daily > Student Accounts > Manage Cash Drawer Sessions**. The Cash Drawer Session Management form is displayed.



Field Descriptions

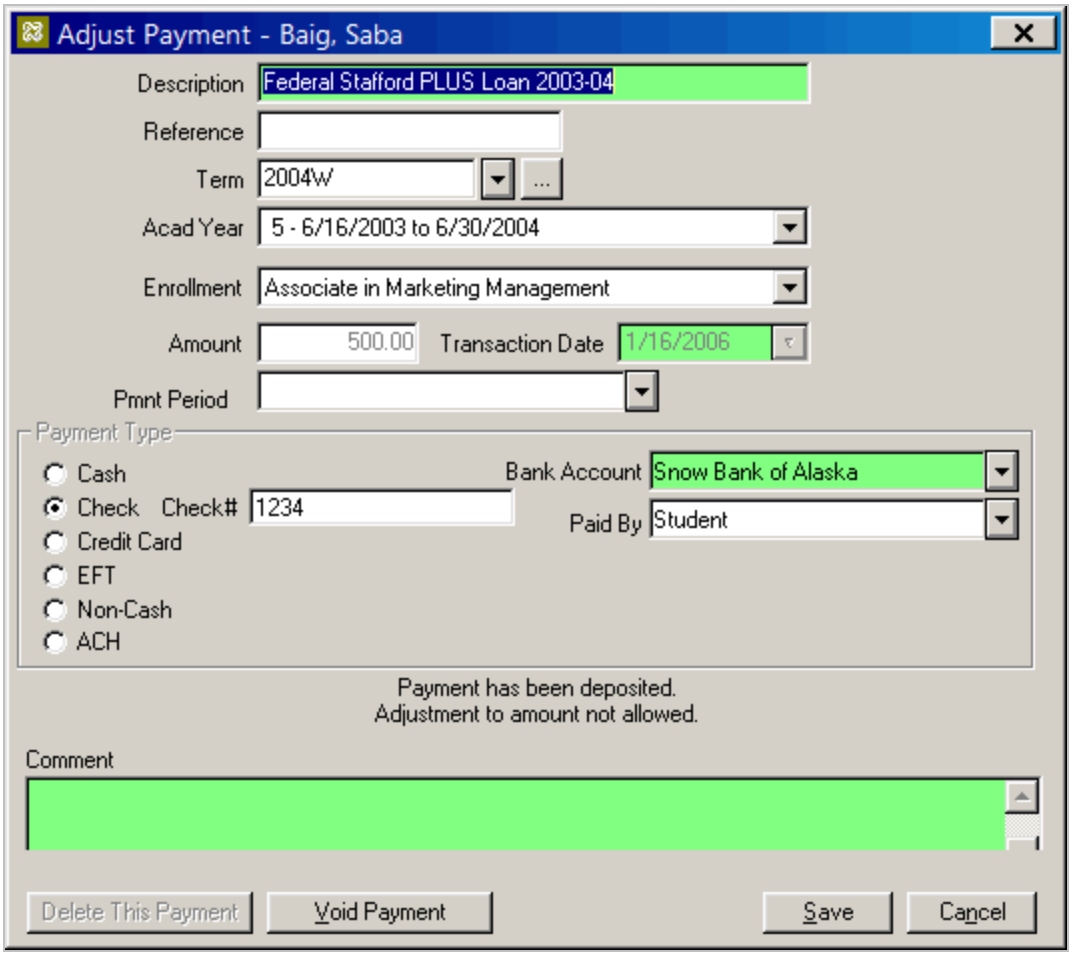
Field	Description
Campus	Choose the Campus to which this session applies.
Cash Drawers in Use	This grid lists all cash drawers that are currently open, that is, being used for transactions. The row for each Cash Drawer displays a description of the drawer, the Code assigned to it, and the Session ID. The Session ID is the Code, date (mmdd), and a sequential number.
Last User Posted	The staff member who was the last to use this drawer.
Last Tran Date	The date on which the last transaction took place.

Field	Description
Cash Drawers Not in Use	This grid lists all cash drawers that are active but not being used at this time. The row for each Cash Drawer displays a description of the drawer and the Code assigned to it.

2. **To change information about a session (drawer):**
    a. Select a session from among those In Use.
    b. Double-click the **Description** field or click **Edit**. The Cash Drawer Session Setup form is displayed. This form shows the Code Description and Opening Balance of this Drawer. The Opening Balance is not counted in the transaction limits. The Opening Balance is the "bank" from which the staff member makes change.
    c. Change information in any of the fields.
3. **To reconcile a session:**
    a. Select a session from those In Use.
    b. Click **Reconcile**. The Cash Drawer Session Reconcile/Close form is displayed. For more information, see Reconciling Cash Drawers.

Adjusting a Transaction

1. To adjust a transaction, select a transaction from the grid and click **Adjust Transaction**. The Adjust Payment form is displayed:



2. Click **Delete This Payment** to erase all records of this transaction from the student's Ledger. This feature is typically used if a payment is applied to the wrong student in error.
3. Click **Void Payment** to undo the transaction. A record of the transaction is displayed on the student's Ledger Card.
4. Click **Returned Check** to mark this check as Returned. The student's Ledger will be updated accordingly, and a fee will be applied if it is your school's policy to do so.
5. Click **Save** to retain your transaction adjustments.
6. Click **Cancel** to return to the previous form. Change any fields on this form. The **Comment** field is required. You must specify the reason for the adjustment.
7. Click **Close Drawer** to end the session. All types of receipts (including the cash Opening Balance) must all be confirmed to close the session. If you have not confirmed all payments, CampusNexus Studentprompts you to do so. When the drawer is closed, CampusNexus Student returns to the **Cash Drawer Session Management** form. The previously opened drawer is now displayed in the Cash Drawers Not in Use portion of the form.
8. Click **Print** to print a report of this transaction.

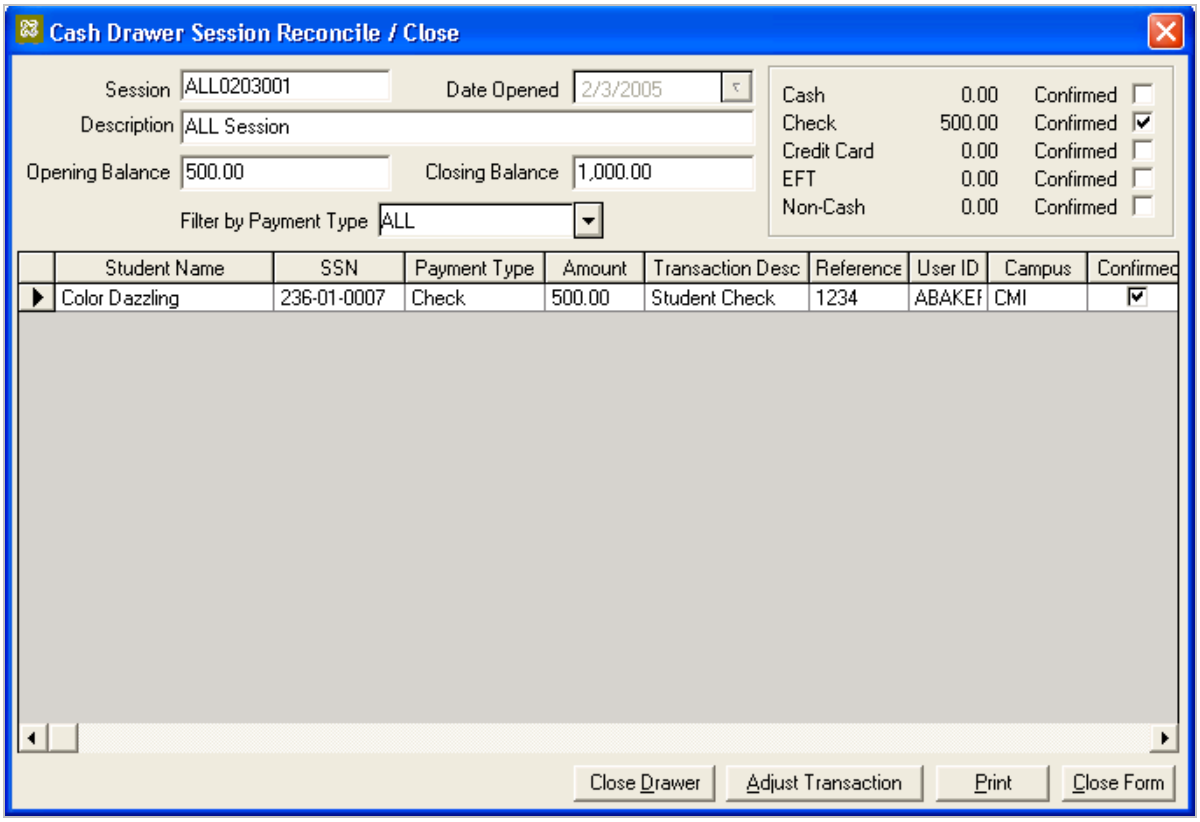
Reconciling Cash Drawers

Reconciling a cash drawer is the process of checking each transaction that has taken place during a cash drawer session and confirming it against physical evidence of the transaction (cash, checks, credit card receipts, vouchers). Typically, the cashier reconciles the drawer by adding up the receipts and including a calculator tape with the remittance. The administrator closes the drawer, formally reconciles the contents, and prepares a bank deposit. The Cash Drawer Session Management function also enables the authorized user to adjust transactions.

Cash drawers require the cashiering function to be enabled (Setup > Campus Information > Allow), staff members must be designated as cashiers, and the institution must have set up dedicated bank accounts for this purpose.

To reconcile a session:

1. Navigate to **Daily > Student Accounts > Manage Cash Drawer Sessions**.
2. Select a session from **Cash Drawers In Use**.
3. Click **Reconcile**. The Cash Drawer Session Reconcile/Close form is displayed. (For detailed information about closing a cash drawer, see Cash Drawer Session Management.)



Field Descriptions

Field	Description
Code	The Session ID

Field	Description
Date Opened	The date on which the staff member opened the Cash Drawer (session).
Description	The cash drawer being used
Opening Balance	The "bank" used to make change. This amount does not count toward restrictions and warnings.
Closing Balance	The "bank" plus all cash, checks and receipts received.
Confirmation Boxes	This area in the upper right corner of the form lists all types of receivables and the total for each type. As the user checks (confirms) receipt of each item in the grid below, these boxes are selected automatically. Likewise, when a check box in this area is selected, all transactions in the grid that fit that description (checks, cash, ACH, etc.), are confirmed (selected) in the grid. **Note**: Information about a student transaction displayed in the grid is read-only. Double-click on a cell to get Transaction Detail information.
Student Name	The student to whose Ledger the payment shall be applied (read-only)
SSN	The Social Security Number of the student to whose Ledger the payment shall be applied
Payment Type	Cash, Check, Credit Card, etc.
Amount	The amount of the transaction in US dollars.
Transaction Desc	The purpose of the payment.
Reference	The check number, credit card number or any information identifying the transaction.
User ID	The cashier who made the transaction.
Campus	The campus at which the payment was made. This is not necessarily the campus to which the payment is to be applied.
Confirmed	The authorized user's confirmation that the check, cash or receipt is included in the drawer.

4. Click **Close Drawer** to end the session. All types of receipts (including the cash Opening Balance) must be confirmed to close the session. If you have not confirmed all payments, CampusNexus Student prompts you to do so.

   When the drawer is closed, CampusNexus Student returns to the Cash Drawer Session Management form. The previously opened drawer is now displayed in the Cash Drawers Not in Use portion of the form.

5. Click **Print** to print a report of this transaction.

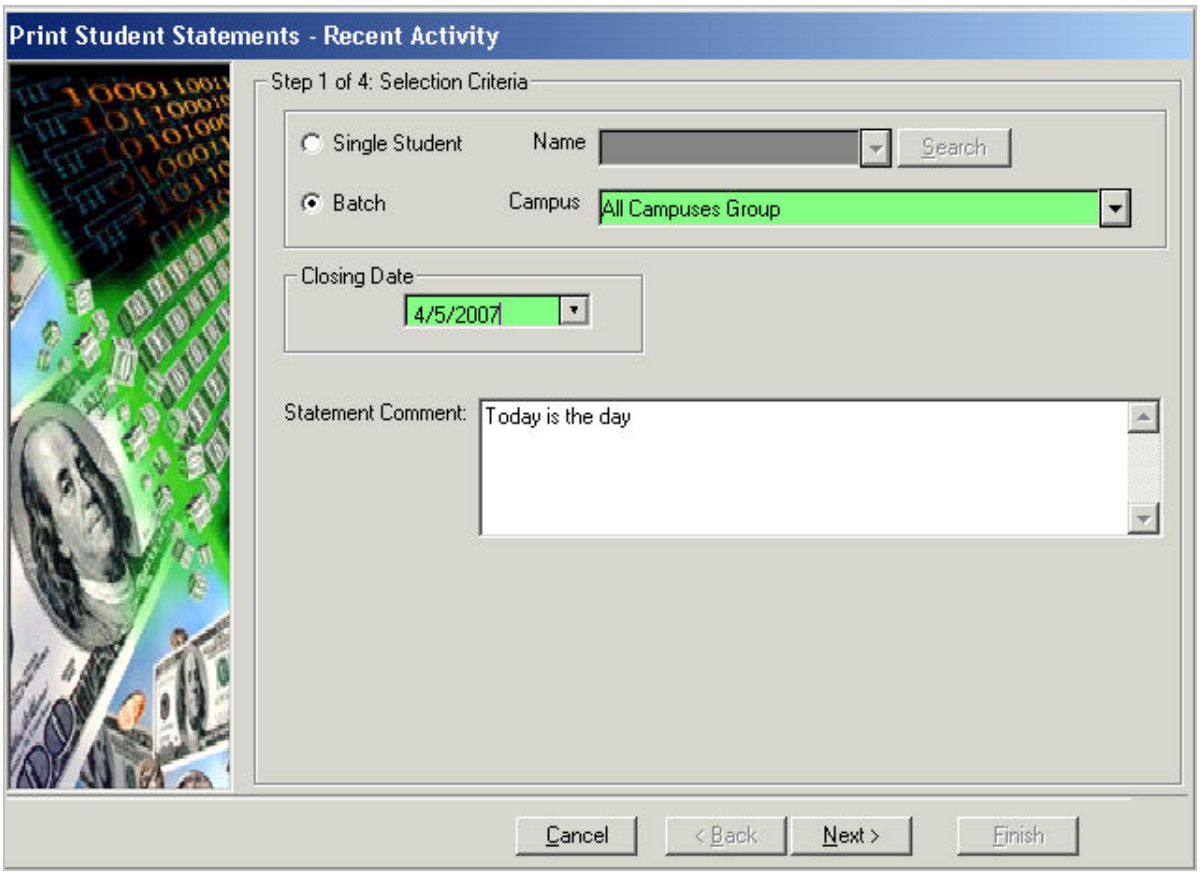
Student Payment Statements

CampusNexus Student can print periodic batches of students' accounts receivable statements. You can choose various criteria for selecting the students for whom statements will be printed.

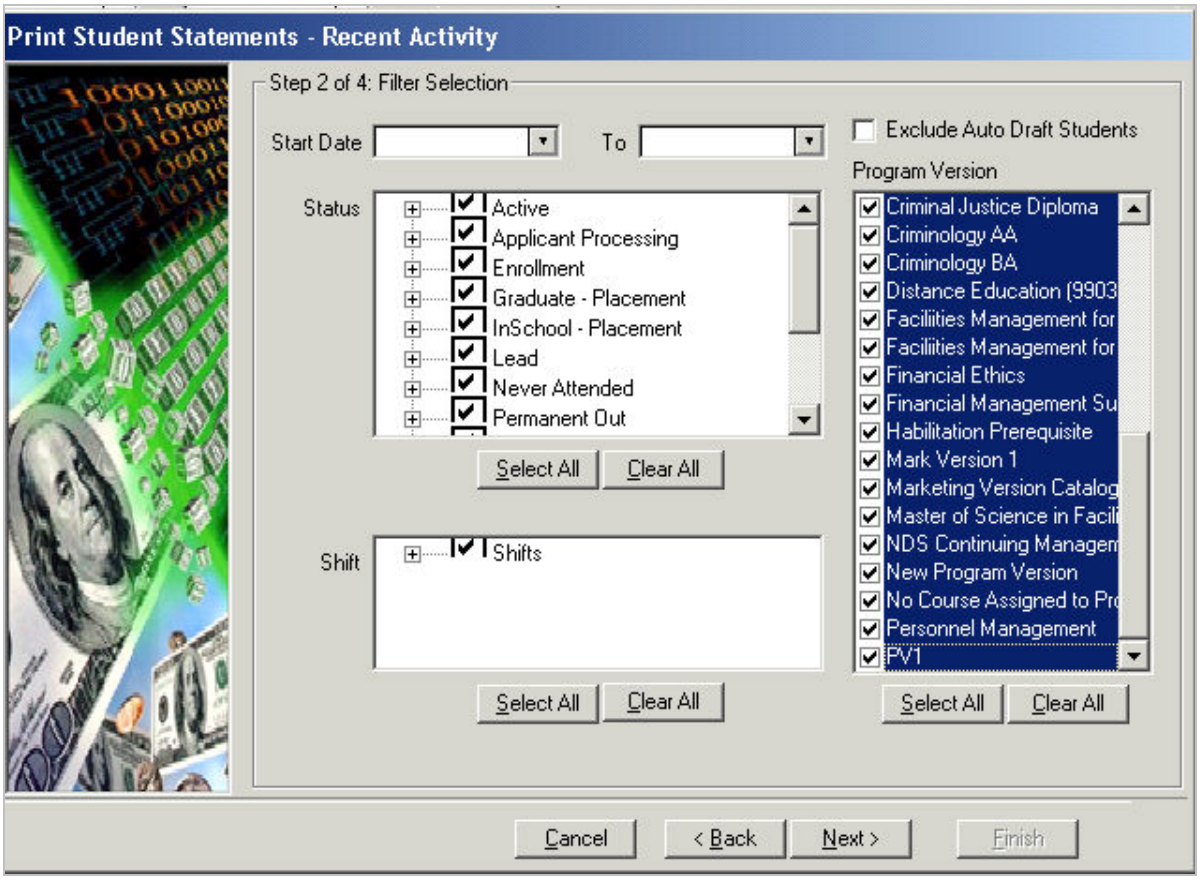
Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

To print student statements:

1. Navigate to **Daily > Student Accounts** > **Student Billing Statements** > **Student Payment Statements**. Step 1 of 4: Selection Criteria of the Print Student Statements wizard is displayed.



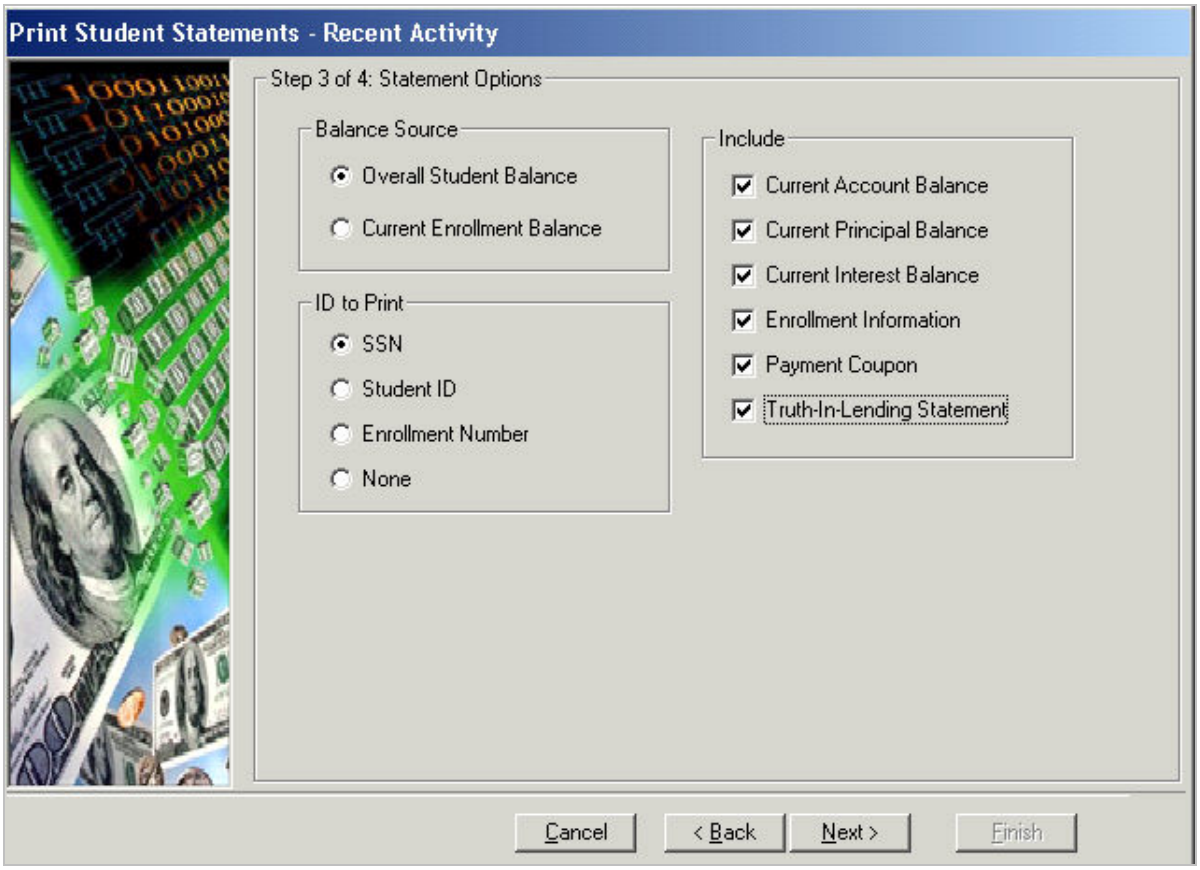
2. Select **Single Student** or **Batch** for which to print statements.
3. In the Campus field, select the **All Campuses Group** or select a specific campus.
4. Enter or select the **Closing Date**. After you print statements the first time, CampusNexus Student adds one month to the date and uses it as a default date the next time you run the statement wizard.
5. Optional: Enter a **Statement Comment** to appear at the bottom of each printed statement. You can prevent users from editing this field.
6. Click **Next**. Step 2 of 4: Filter Selection of the wizard is displayed.



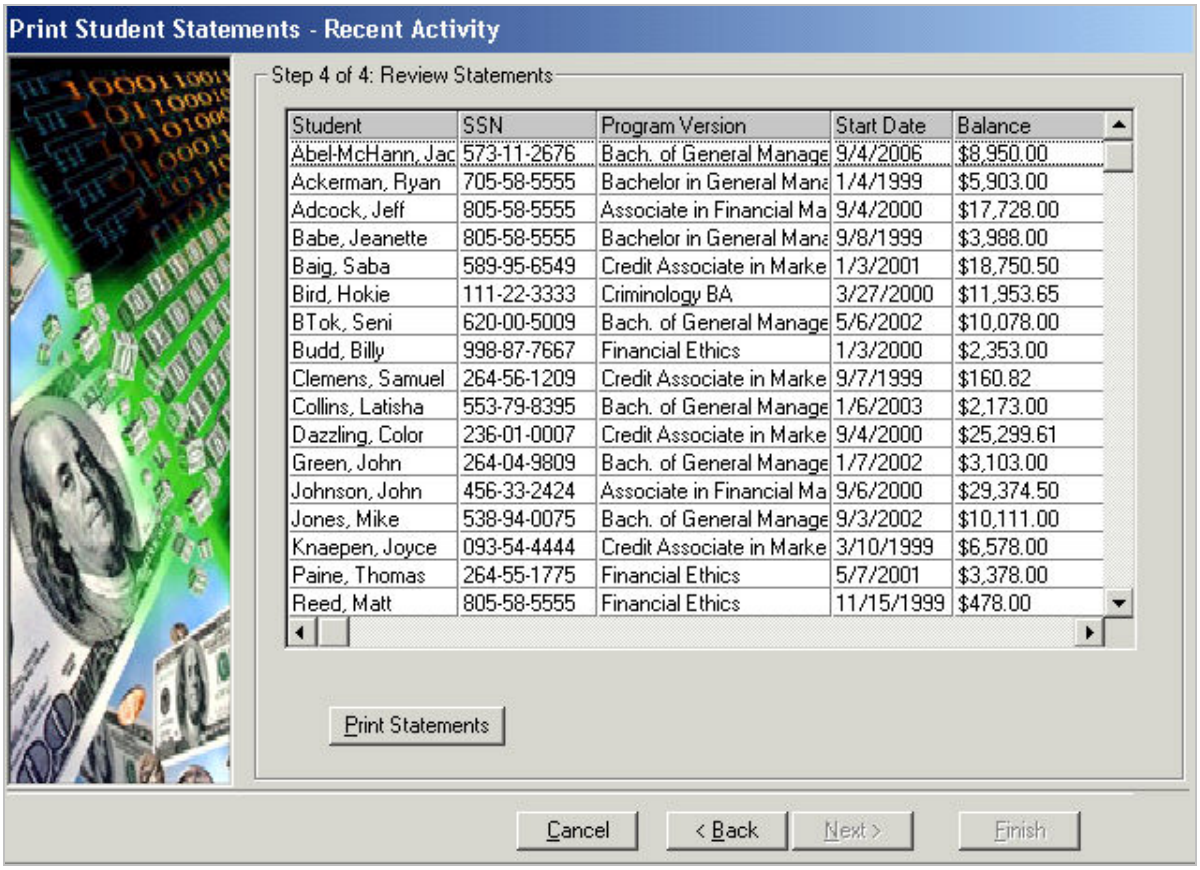
7. Select the **Start** and **To** date for your selection.
8. Select **Exclude Auto Draft Students** to exclude any student authorized for auto draft from this statement.
9. Select the student status criteria. Click **Select All** to select all student school statuses or **Clear All** to clear previous status selections, or select statuses individually using the check boxes.

   Click the **Plus** signs to expand the status categories to see more status detail. You must select at least one school status for statements to be printed.
10. Select the **Shift(s)** for which statements are to be printed. Use **Select All** to select all shifts or **Clear All** to clear previously selected shifts.

    Click the **Plus** signs to expand the shift list to see more status detail. You must select at least one shift for statements to be printed.
11. Select the Program Version criteria. Click **Select All** to select all program versions or **Clear All** to clear previous program version selections, or select versions individually using the check boxes. You must select at least one program version for statements to be printed.
12. Click **Next**. Step 3 of 4: Statement Options of the wizard is displayed.

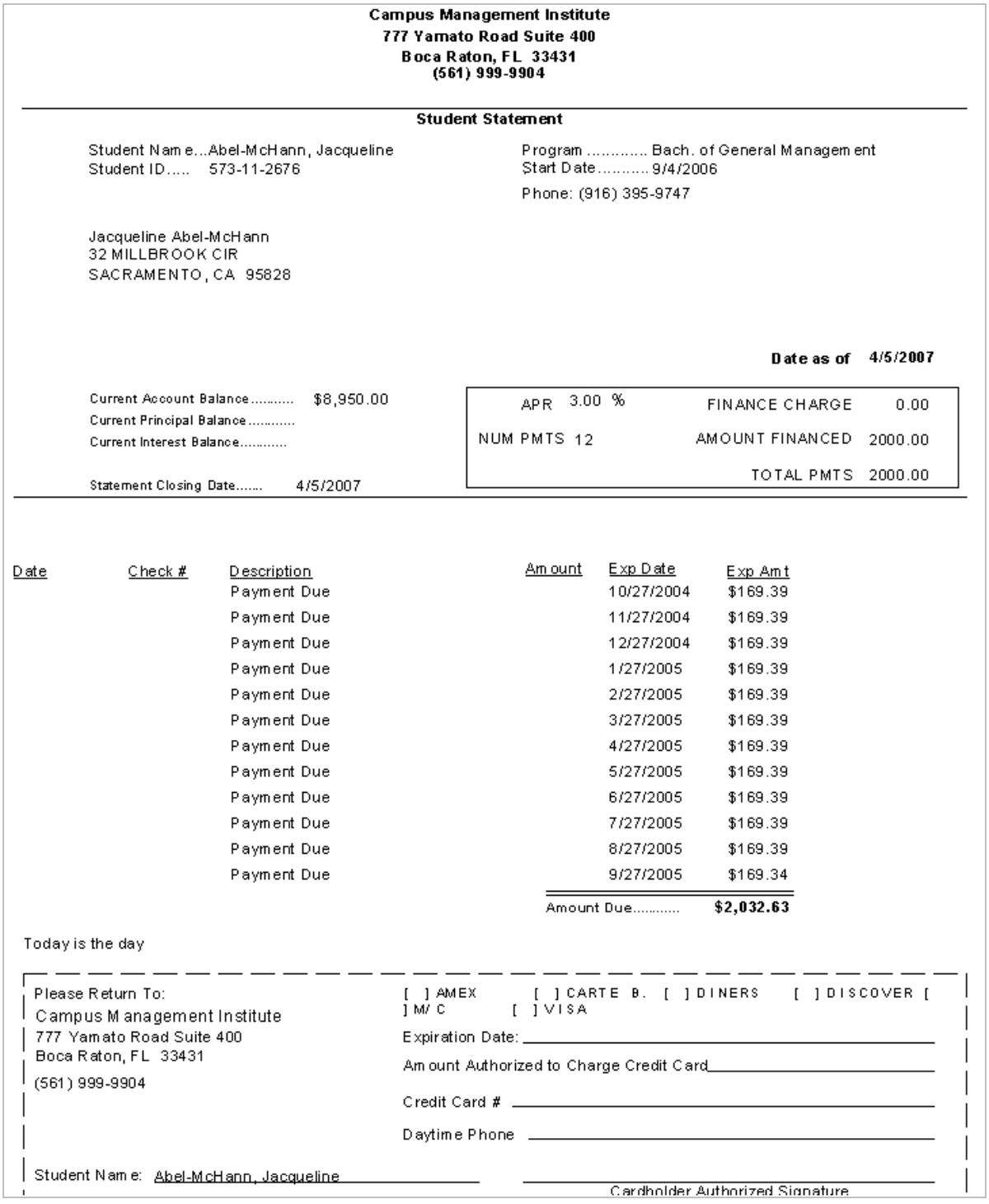


13. Select the statement options that you would like printed. The **Remittance Address** is used on the return coupon, if configured, when the **Payment Coupon** option is selected.
14. Click **Next**. In Step 4 of 4: Review Statements, review the statements on this form.



15. Click **Print Statements.** The report form loads the statements in the Report Viewer. The statements are displayed by the Crystal Reports preview program. Review and print the statements as necessary. A sample statement is shown below. The Student's name and ID Number are pre-printed on the payment coupon.

    Note: All credit cards types supported by CampusNexus Student are printed on the payment coupon, regardless of whether your institution or campus accepts these cards.



Campus Management Institute
777 Yamato Road Suite 400
Boca Raton, FL 33431
(561) 999-9904

Student Statement

Student Name...Abel-McHann, Jacqueline
Student ID..... 573-11-2676

Program ..... Bach. of General Management
Start Date..... 9/4/2006
Phone: (916) 395-9747

Jacqueline Abel-McHann
32 MILLBROOK CIR
SACRAMENTO, CA 95828

Date as of 4/5/2007

Current Account Balance..... $8,950.00
Current Principal Balance.....
Current Interest Balance.....

Statement Closing Date..... 4/5/2007

APR	3.00 %	FINANCE CHARGE	0.00
NUM PMTS	12	AMOUNT FINANCED	2000.00
		TOTAL PMTS	2000.00

Date	Check #	Description	Amount	Exp Date	Exp Amt
		Payment Due		10/27/2004	$169.39
		Payment Due		11/27/2004	$169.39
		Payment Due		12/27/2004	$169.39
		Payment Due		1/27/2005	$169.39
		Payment Due		2/27/2005	$169.39
		Payment Due		3/27/2005	$169.39
		Payment Due		4/27/2005	$169.39
		Payment Due		5/27/2005	$169.39
		Payment Due		6/27/2005	$169.39
		Payment Due		7/27/2005	$169.39
		Payment Due		8/27/2005	$169.39
		Payment Due		9/27/2005	$169.34
			Amount Due.....		**$2,032.63**

Today is the day

Please Return To:
Campus Management Institute
777 Yamato Road Suite 400
Boca Raton, FL 33431
(561) 999-9904

[ ] AMEX [ ] CARTE B. [ ] DINERS [ ] DISCOVER [ ] M/C [ ] VISA
Expiration Date: _____
Amount Authorized to Charge Credit Card _____
Credit Card # _____
Daytime Phone _____

Student Name: Abel-McHann, Jacqueline

_____
Cardholder Authorized Signature

16. Close the report preview form after you view and print your statements. The Print Student Statements form is still open in your work area.

17. Select the appropriate answer to the question, **Did statement(s) print okay?**. If your answer is **Yes**, when you click **Finish**, the wizard closes the procedure. If your answer is **No**, the wizard returns to the first page.

Note: To ensure that the Student Payment Statement is being sent out on a regular basis, the date that the last Student Payment Statement was printed for each payment plan is displayed in the Last Statement date field in the Last Statement column of the form. The Last Statement date field on the schedule is updated when the student statement process is completed. The Last Statement date field is only updated for Student and Agency Payments with a Fund Source type of 'Cash'. This date field is updated with the system date when the user confirms that the statements printed correctly and presses the Finish button in the Print Student Statements wizard. The user can then reference the Last Statement date field on the Payment Schedule form.

Student Account Balance Statements

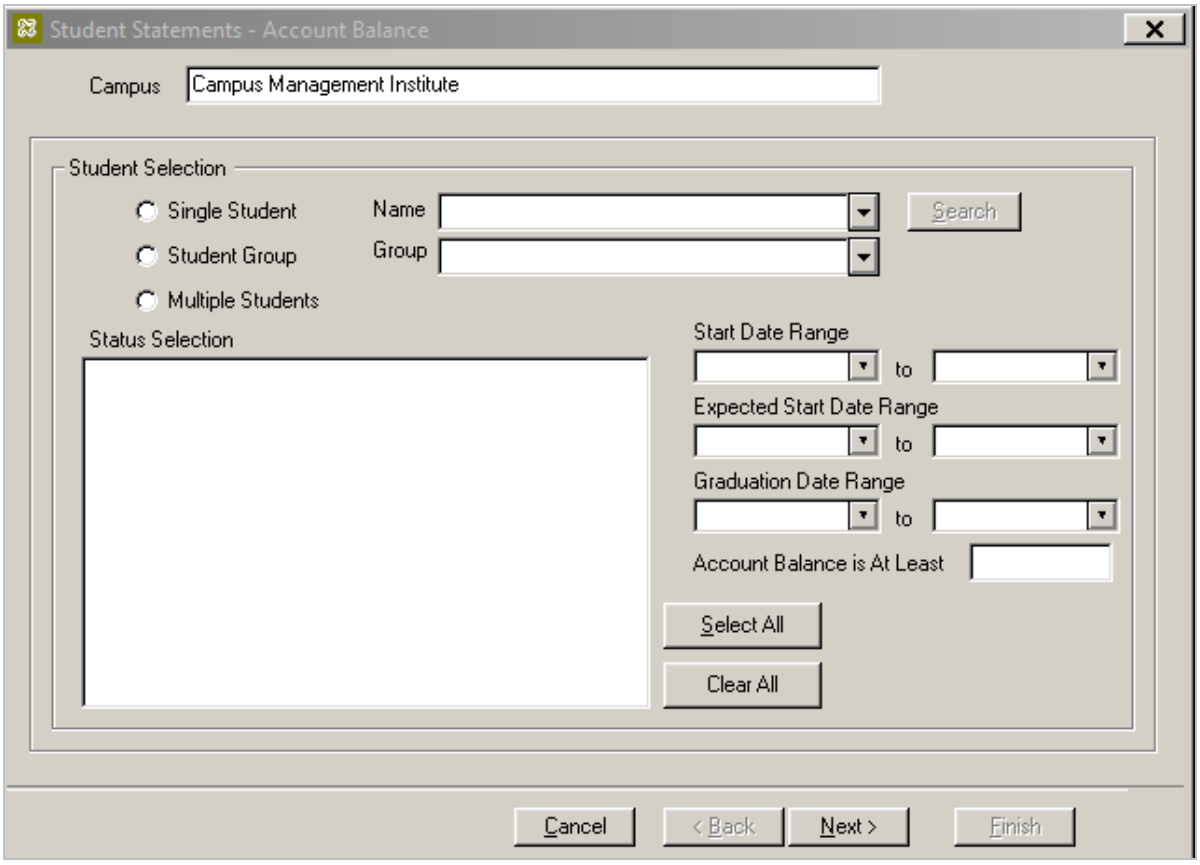
Student Account Balance Statements are printable accounts of financial activity sent to students monthly indicating the amount they are required to pay the institution.

When statements are generated by an institution, CampusNexus Student first determines if there are scheduled payments for the student. If no payment schedule is found, CampusNexus Student reviews the student ledger and reports the account balance as the amount due for the statement period.

If the student statement indicates that the overall balance on the student account is...
... a *credit*, no statement is generated.
... a *debit*, the statement indicates the debit balance in the Amount Due field of the statement.

To generate a Student Account Balance Statement:

1. Navigate to **Daily > Student Accounts > Student Billing Statements > Student Account Balance Statement**. The Student Statements - Account Balance form is displayed.



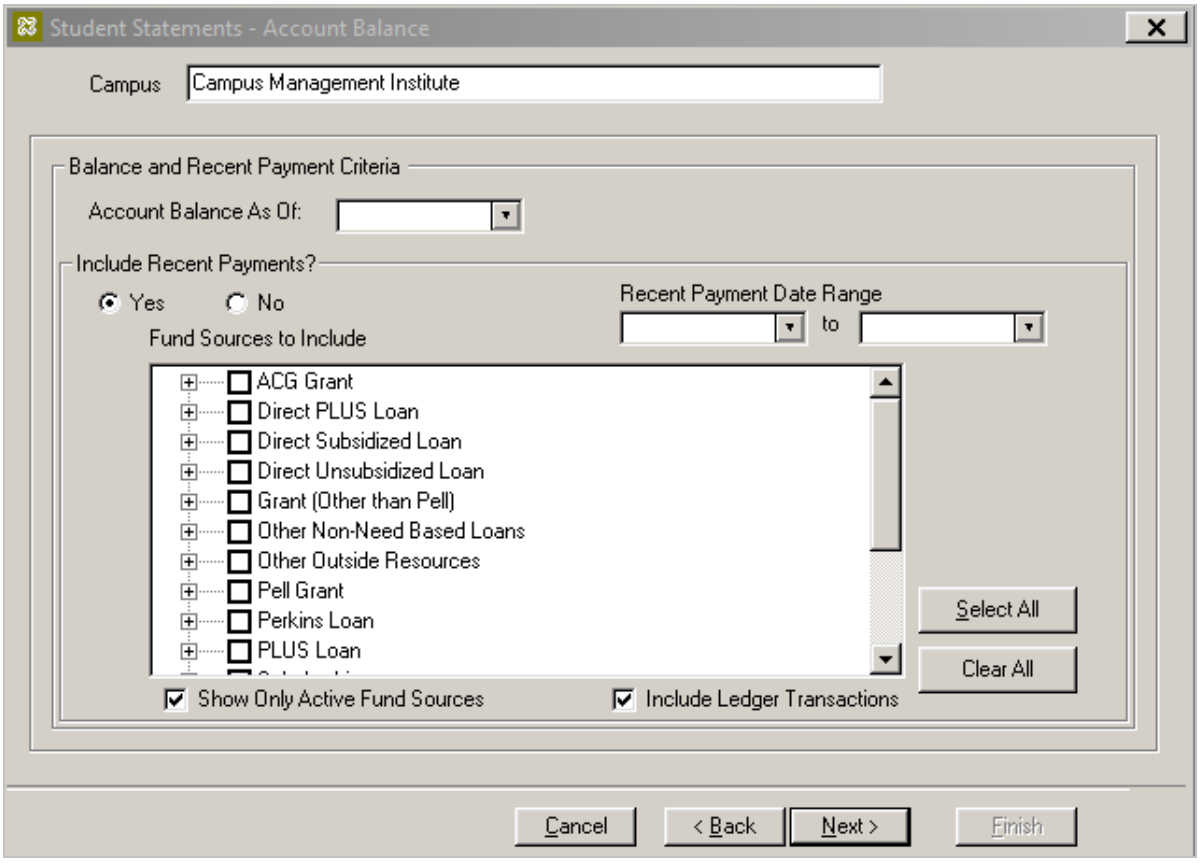
2. Complete the fields on this form as needed.

Field Descriptions

Field	Description
Campus	Select a campus.

Field	Description
Single Student	When you select this option, use the **Name** list to find the student's name, or click Search to find the student.
Student Group	When you select this option, use the **Group** list to choose a group.
Multiple Students	When you select this option, use the Status Selection list to select the statuses of the students. Click **Select All** to capture all statuses. Click **Clear All** and choose statuses individually. Other filtering criteria include: • Start Date Range • Expected Start Date Range • Graduation Date Range • Account Balance is At Least Select as many criteria as possible to narrow your search.

3. Click **Next** to proceed, **Back** to return to the previous form, or **Cancel** to quit the process.

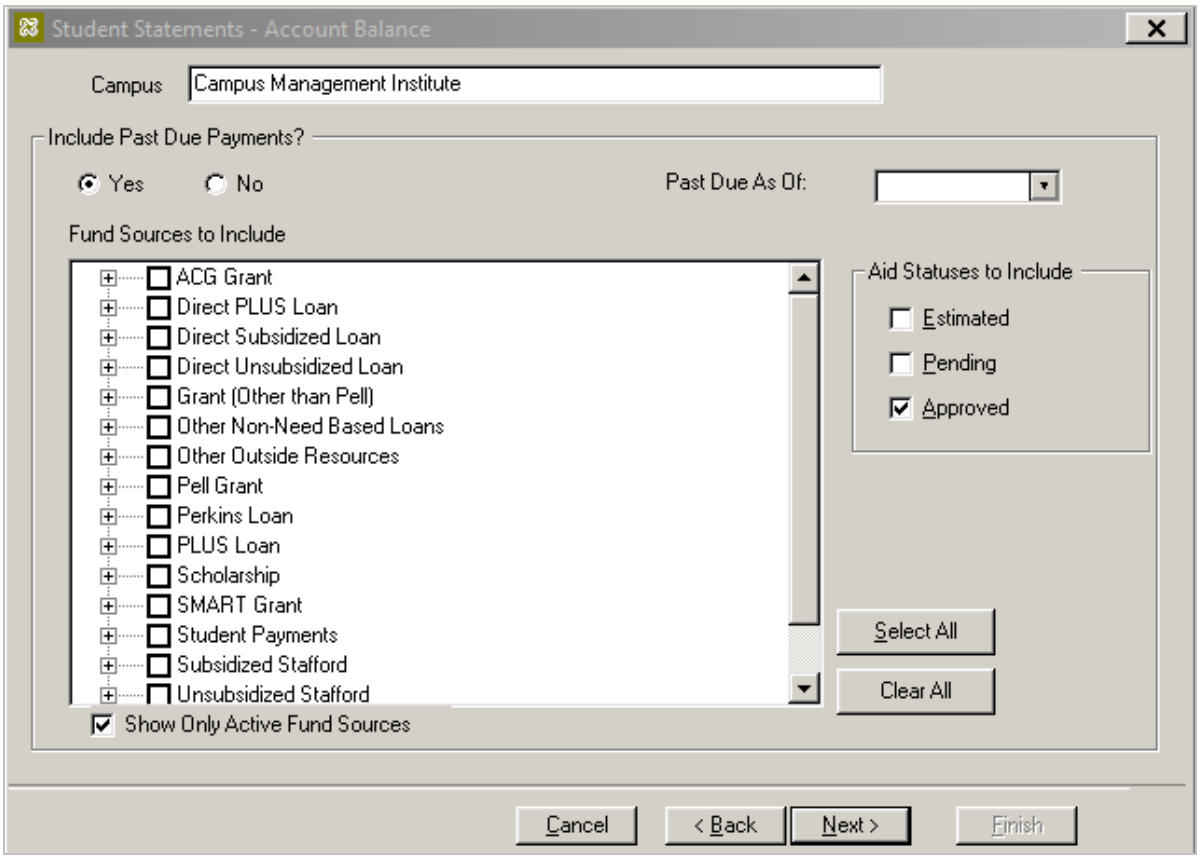


4. Complete the fields on this form as needed.

Field Descriptions

Field	Description
Account Balance As Of	Select a date.
Include Recent Payments?	Use the Yes/No options to indicate whether to include recent payments received (including refunds, stipends, and voids for the period) on the statement. If you select Yes, the **Recent Payment Date Range** fields become available. Select a date range.
Fund Sources to Include	Select the Fund Sources that you want to include for Recent Payments on the statements. Click **Select All** to capture all fund sources. Click **Clear All** and choose fund sources individually.
Show Only Active Fund Sources	Select this option if you want only active sources to appear in the list.
Include Ledger Transactions	Select this option if you want to include ledger transactions. The transaction date, description, and amount are displayed for each payment presented.

5. Click **Next** to proceed, **Back** to return to the previous form, or **Cancel** to quit the process.

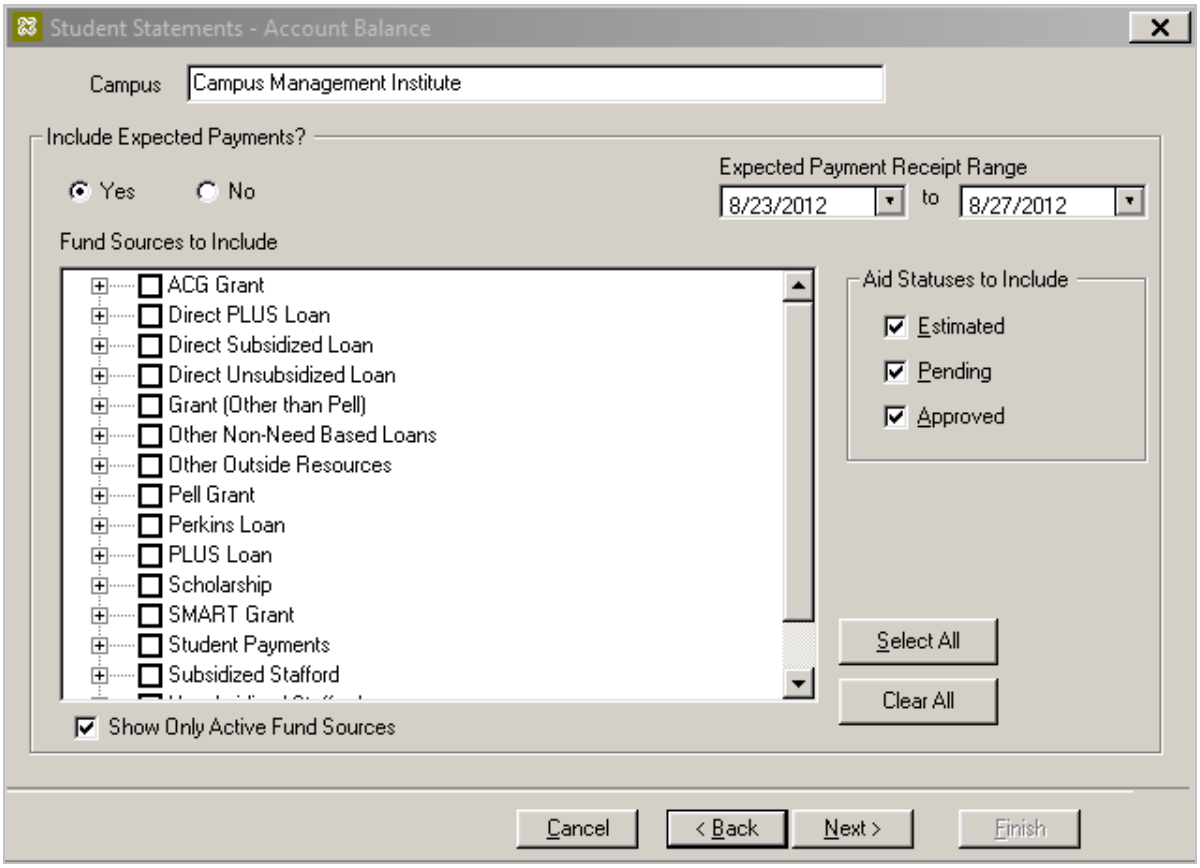


6. Complete the fields on this form as needed.

Field Descriptions

Field	Description
Include Past Due Payments	Use the Yes/No options to indicate whether to include past due payments on the statement. If you select Yes, the **Past Due As Of** field becomes available. Select a date.
Aid Statuses to Include	Select as many statuses as you want to include on the statement. Available statuses are: • Estimated • Pending • Approved
Fund Sources to Include	Select the Fund Sources you want to include for Past Due Payments on the statements. Click **Select All** to capture all fund sources. Click **Clear All** and choose fund sources individually.
Show Only Active Fund Sources	Select this option to view only active fund sources. The date scheduled, fund source description, and amount scheduled are displayed for each fund source included.

7. Click **Next** to proceed, **Back** to return to the previous form, or **Cancel** to quit the process.

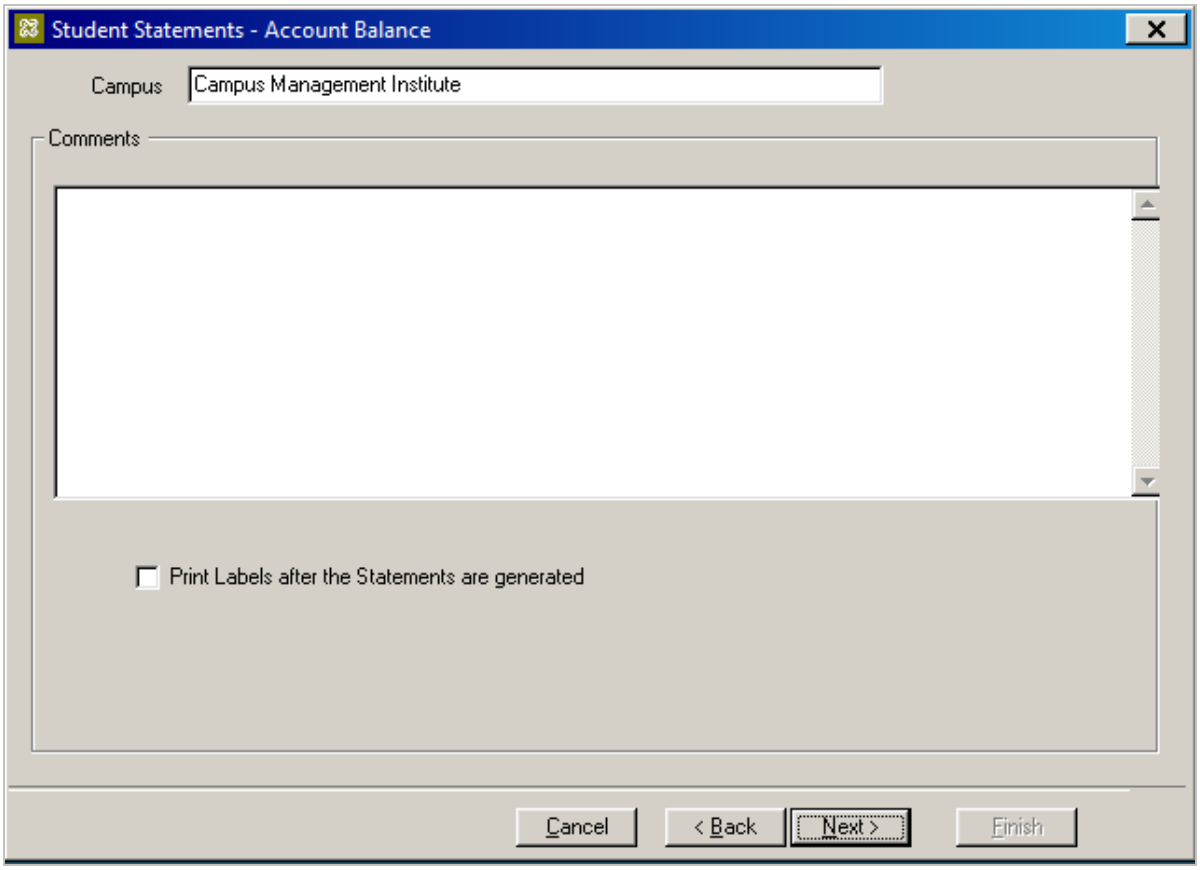


8. Complete the fields on this form as needed.

Field Descriptions

Field	Description
Include Expected Payments?	Use the Yes/No options to indicate whether to include expected payments on the statement. If you select Yes, the **Expected Payment Receipt Range** fields become available. Select a date range.
Fund Sources to Include	Select the Fund Sources you want to include for Expected Payments on the statements. Click **Select All** to capture all fund sources. Click **Clear All** and choose fund sources individually.
Aid Statuses to Include	Select as many statuses as you want to include on the statement. Available statuses are: • Estimated • Pending • Approved
Show Only Active Fund Sources	Select this option to view only active fund sources. The date scheduled, fund source description, and amount scheduled are displayed for each fund source included.

9. Click **Next** to proceed, **Back** to return to the previous form, or **Cancel** to quit the process.



10. Complete the fields on this form as needed.

Field Descriptions

Field	Description
Comments	Enter any comments that you want to include on the report.
Print Labels after the Statements are generated	Select or clear this check box to indicate if you want to print labels after the account balances are printed.

11. Click **Next** to proceed, **Back** to return to the previous form, or **Cancel** to quit the process.
12. This form is a read-only review of the selection criteria and other information to be printed on the report. Click **Finish** to proceed and print the report, **Back** to return to the previous form, or **Cancel** to quit the process.

Student Account Activity Statements

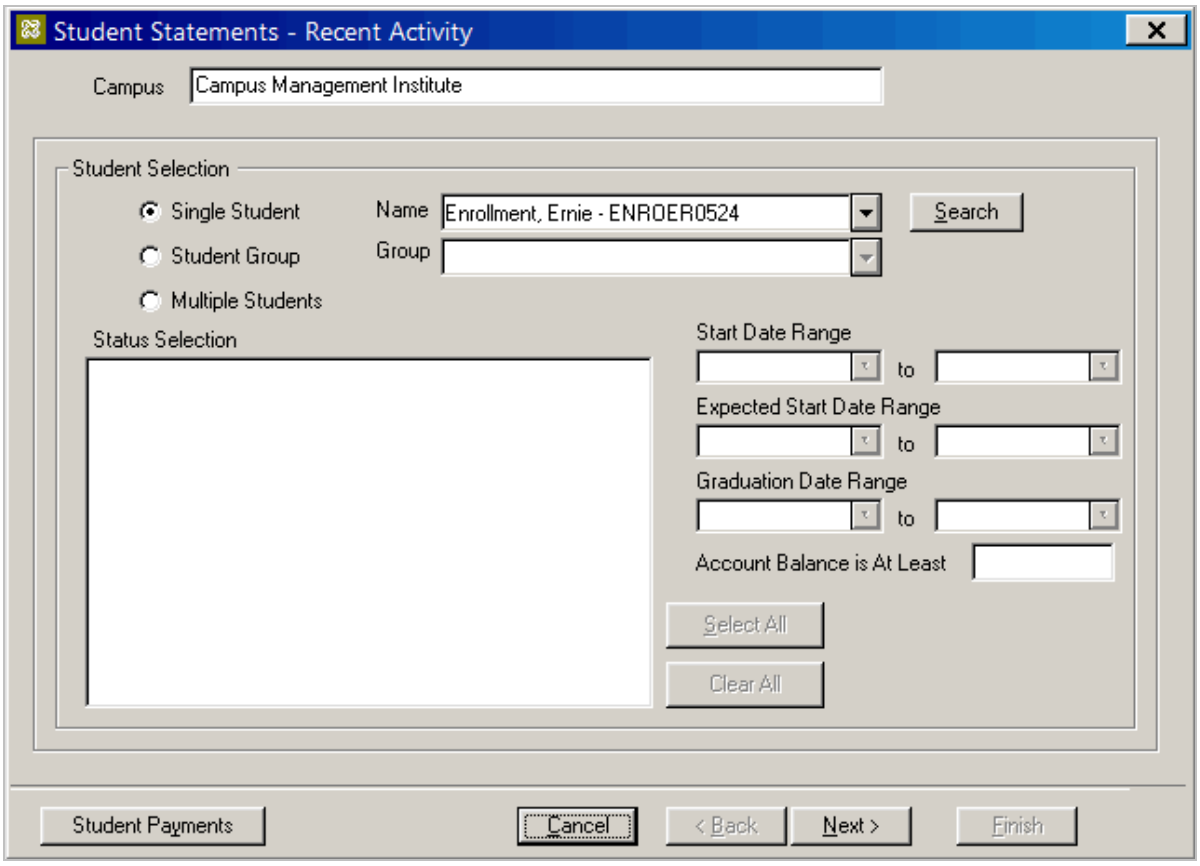
Student Account Activity Statements are printable accounts of financial activity sent to students monthly indicating the amount they are required to pay the school.

When statements are generated by an institution, CampusNexus Student first determines if there are scheduled payments for the student. If no payment schedule is found, CampusNexus Student reviews the Student Ledger and reports the account balance as the amount due for the statement period.

If the student statement indicates that the overall balance on the student account is...
... a *credit*, no statement is generated.
... a *debit*, the statement indicates the debit balance in the Amount Due field of the statement.

To generate a Student Account Balance Statement:

1. Navigate to **Daily > Student Accounts > Student Billing Statements > Student Account Activity Statements**. The Student Statements - Recent Activity form is displayed.



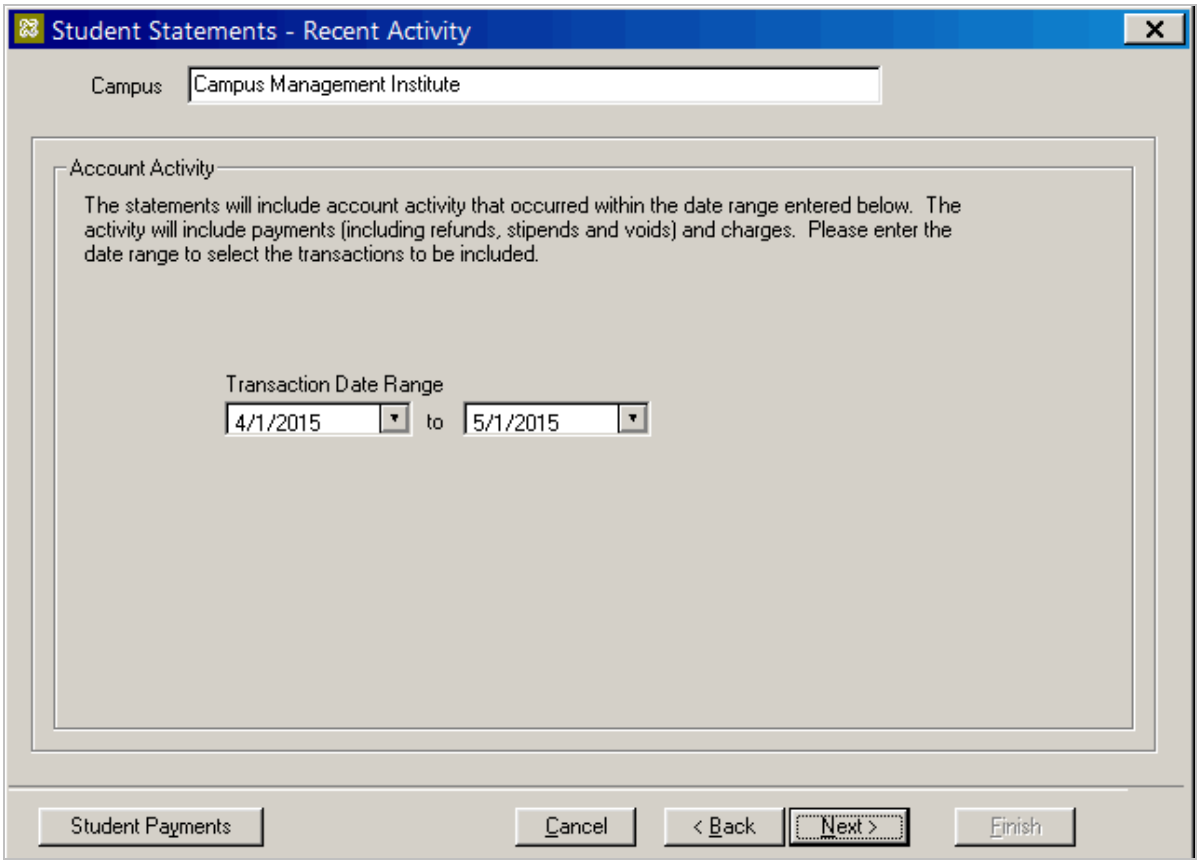
2. Complete the fields on this form as needed.

Field Descriptions

Field	Description
Campus	Use the drop-down list to select a campus.

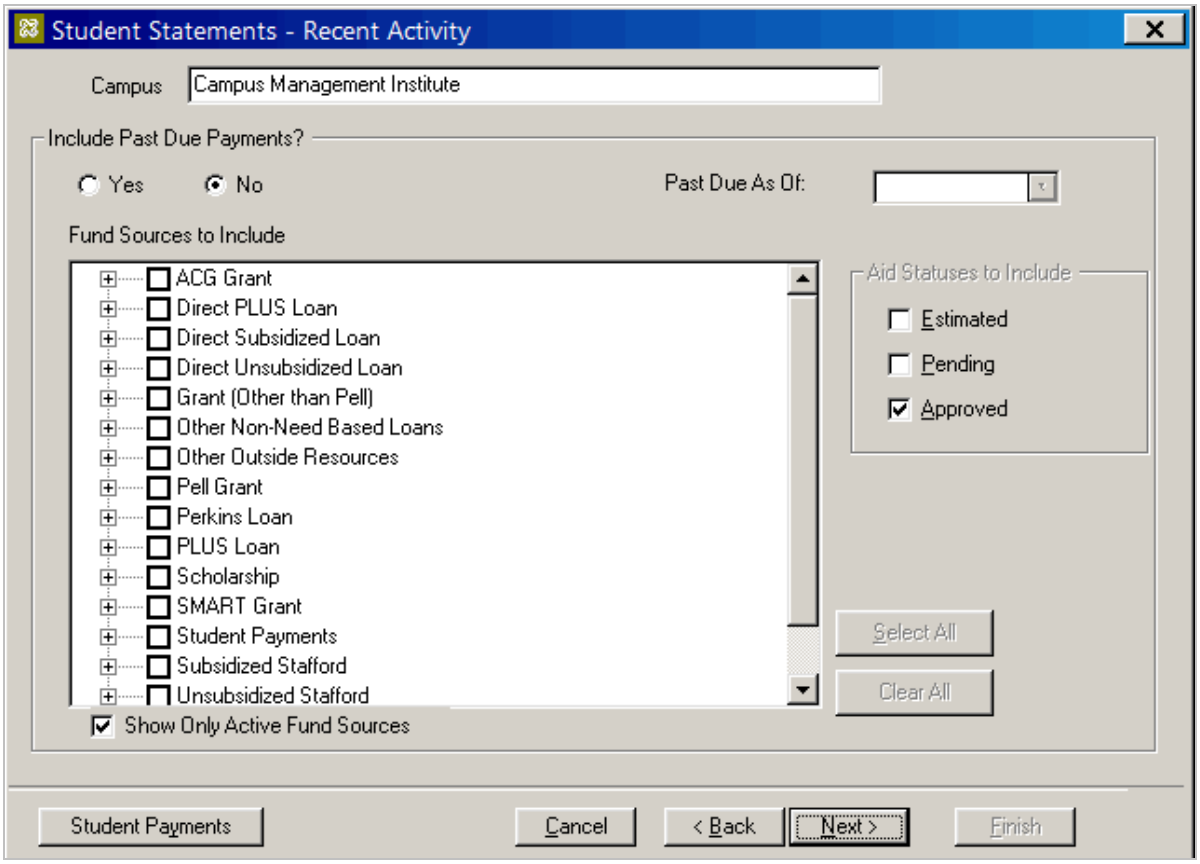
Field	Description
Student Selection	
Single Student	When you select this option, use the Name list to find the student's name, or click Search to find the student.
Student Group	When you select this option, use the Group list to choose a group.
Multiple Students	When you select this option, use the Status Selection list to select the statuses of the students. Click **Select All** to capture all statuses. Click **Clear All** and choose statuses individually. Other filtering criteria include: • Start Date Range • Expected Start Date Range • Graduation Date Range • Account Balance is At Least Select as many criteria as possible to narrow your search.

3. Click **Next** to proceed, **Back** to return to the previous form, or **Cancel** to quit the process.



4. Select a date range for the activities you want to capture.
5. Click **Student Payments** to include student payments in the statement of activities.

6. Click **Next** to proceed, **Back** to return to the previous form, or **Cancel** to quit the process.

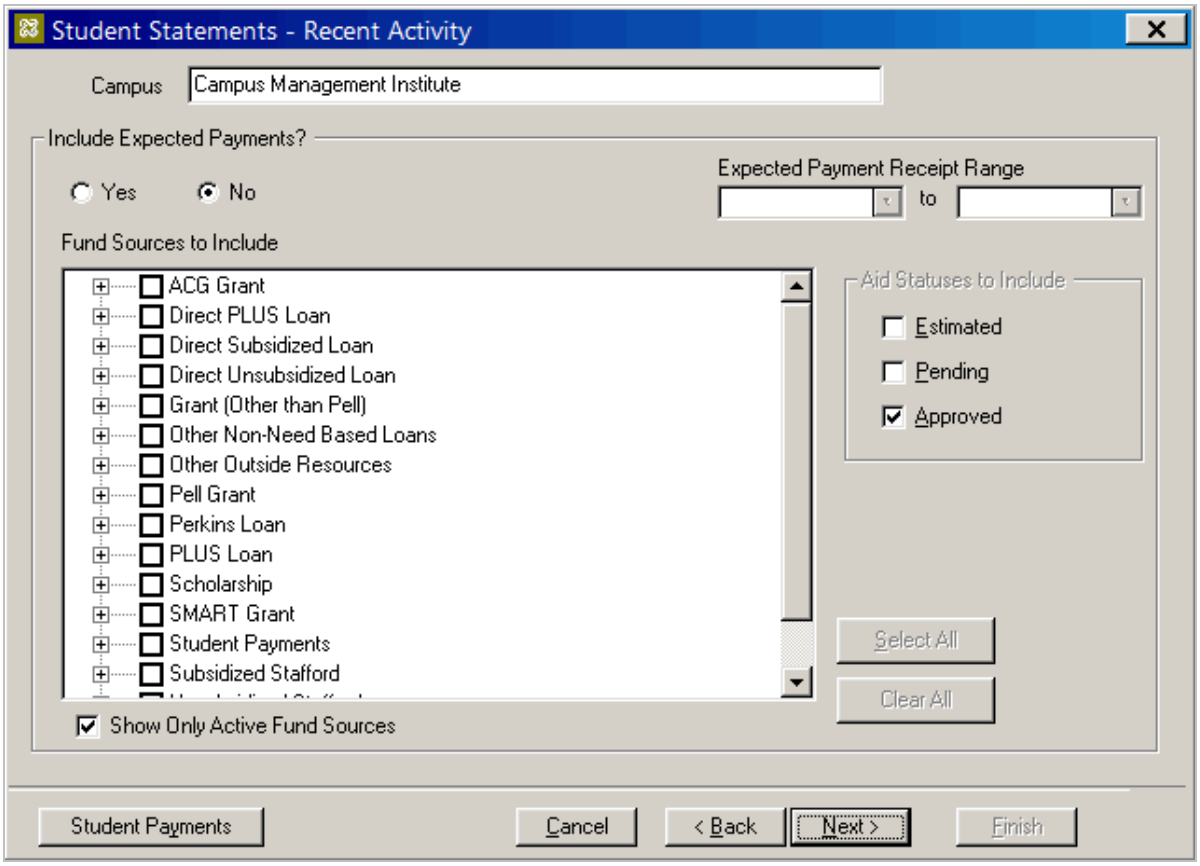


7. Complete the fields on this form as needed.

Field Descriptions

Field	Description
Include Past Due Payments	Use the Yes/No options to indicate whether to include past due payments on the statement. If you select Yes, the **Past Due As Of** field becomes available. Select a date.
Aid Statuses to Include	Select as many statuses as you want to include on the statement. Available statuses are: • Estimated • Pending • Approved
Fund Sources to Include	Select the Fund Sources you want to include for Past Due Payments on the statements. Click **Select All** to capture all fund sources. Click **Clear All** and choose fund sources individually.
Show Only Active Fund Sources	Select this option to view only active fund sources. The date scheduled, fund source description, and amount scheduled are displayed for each fund source included.

8. Click **Next** to proceed, **Back** to return to the previous form, or **Cancel** to quit the process.

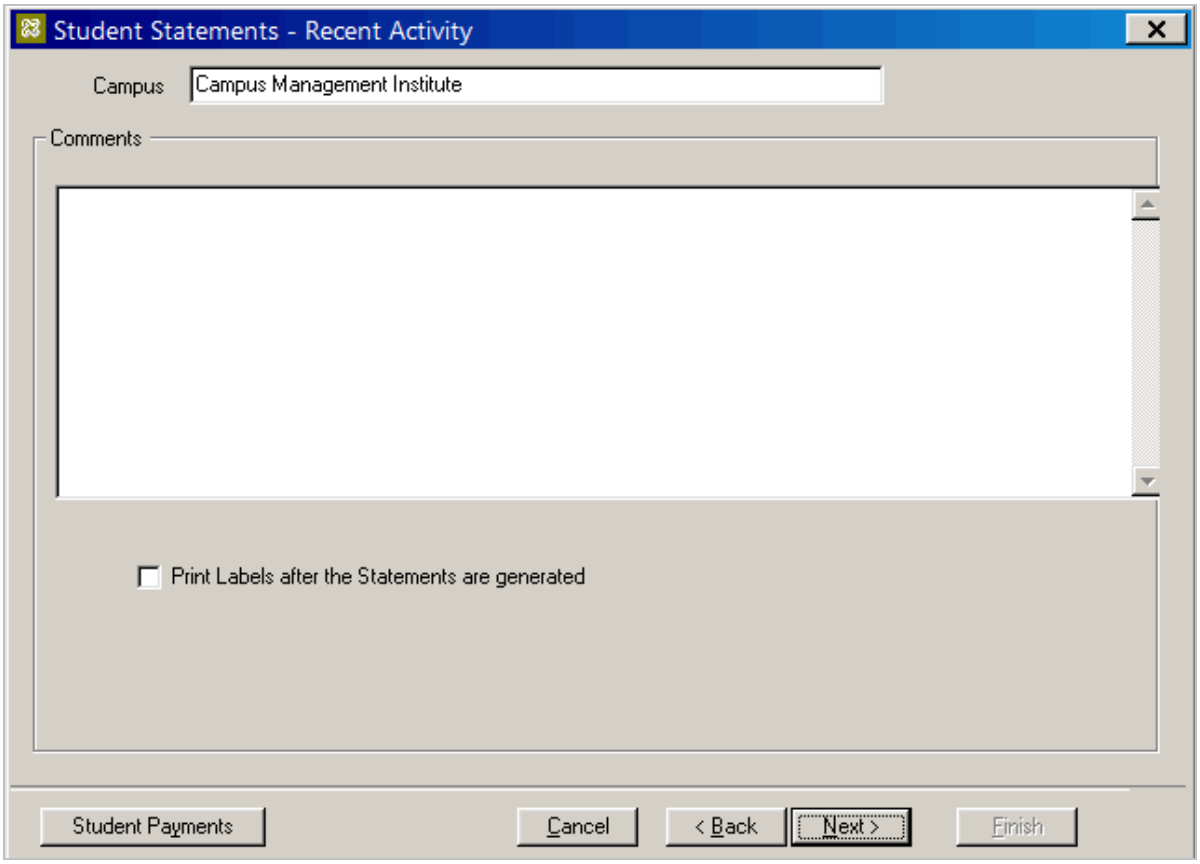


9. Complete the fields on this form as needed.

Field Descriptions

Field	Description
Include Expected Payments	Use the Yes/No options to indicate whether to include expected payments on the statement. If you select Yes, the **Expected Payment Receipt Range** field becomes available. Select a date.
Fund Sources to Include	Select the Fund Sources you want to include for Past Due Payments on the statements. Click **Select All** to capture all fund sources. Click **Clear All** and choose fund sources individually.
Aid Statuses to Include	Select as many statuses as you want to include on the statement. Available statuses are: • Estimated • Pending • Approved
Show Only Active Fund Sources	Select this option to view only active fund sources. The date scheduled, fund source description, and amount scheduled are displayed for each fund source included.

10. Click **Next** to proceed, **Back** to return to the previous form, or **Cancel** to quit the process.



11. Complete the fields on this form as needed.

Field Descriptions

Field	Description
Comments	Enter any comments that you want to include on the report.
Print Labels after the Statements are generated	Select or clear this check box to indicate if you want to print labels after the account balances are printed.

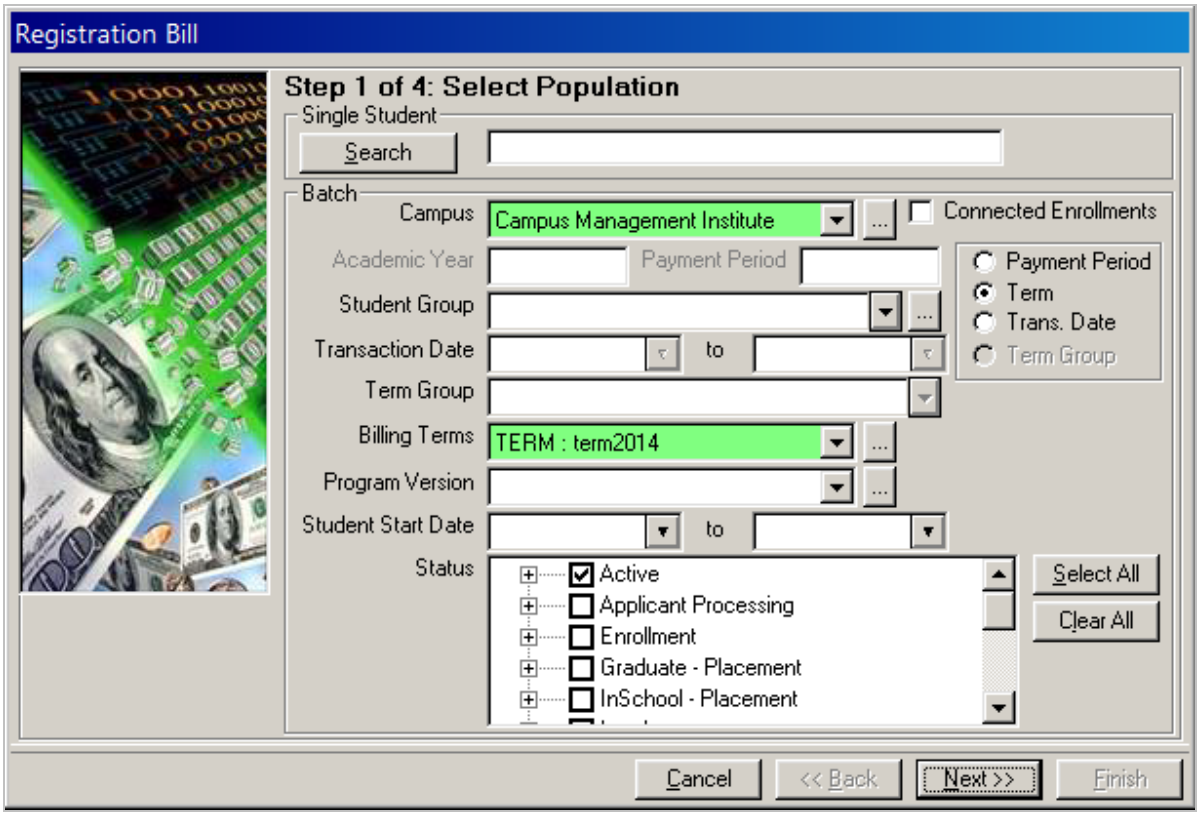
12. Click **Next** to proceed, **Back** to return to the previous form, or **Cancel** to quit the process.
13. This form is a read-only recap of the selection criteria and other information to be printed on the report. Click **Finish** to proceed and print the report **Back** to return to the previous form, or **Cancel** to quit the process.

Registration Bill

Use this form to produce student bills or a summary report. See also Registration Bill Defaults and Purge Billing Statement Records. The Registration Bill functionality was previously referred to as 'Registration Summary by Term'.

To run the Registration Bill wizard:

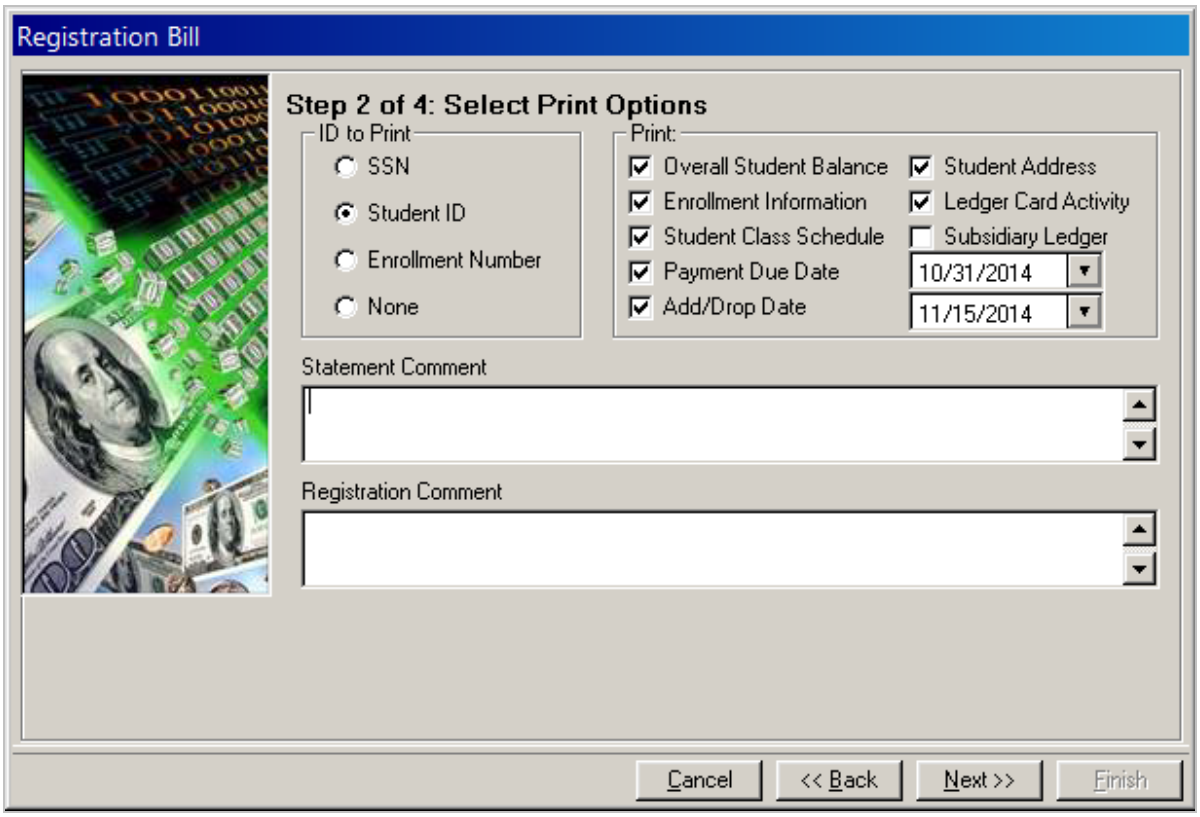
1. Navigate to **Daily** > **Academic Records > Registration Bill**.
   - OR -
   Navigate to **Daily > Student Accounts > Student Billing Statements > Registration Bill**. Step 1 of the Registration Bill wizard is displayed.



2. Search for a **Single Student** or specify selection criteria for a **Batch** of students. If you search for a single student, the batch selection options are disabled.
3. Select a billing period. The options are:
   - Payment Period
   - Term
   - Transaction Date
   - Term Group
4. If applicable, select **Connected Enrollments**. With this selection the options the following options enabled are: Term, Transaction Date, and Term Group.

You can print batch Registration Bills for connected enrollments, with combined detail and aggregated summary information. Connected enrollment information will be printed even if both of the connected enrollment's campus or program version is not selected.

5. Depending on your billing period selection, complete any other required fields.
6. Click **Next**. Step 2 of the Registration Bill wizard is displayed.



7. Select the ID to Print on the registration bill. The options are:

   - SSN
   - Student ID
   - Enrollment Number
   - None

   Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

8. Select additional information to print on the bill.

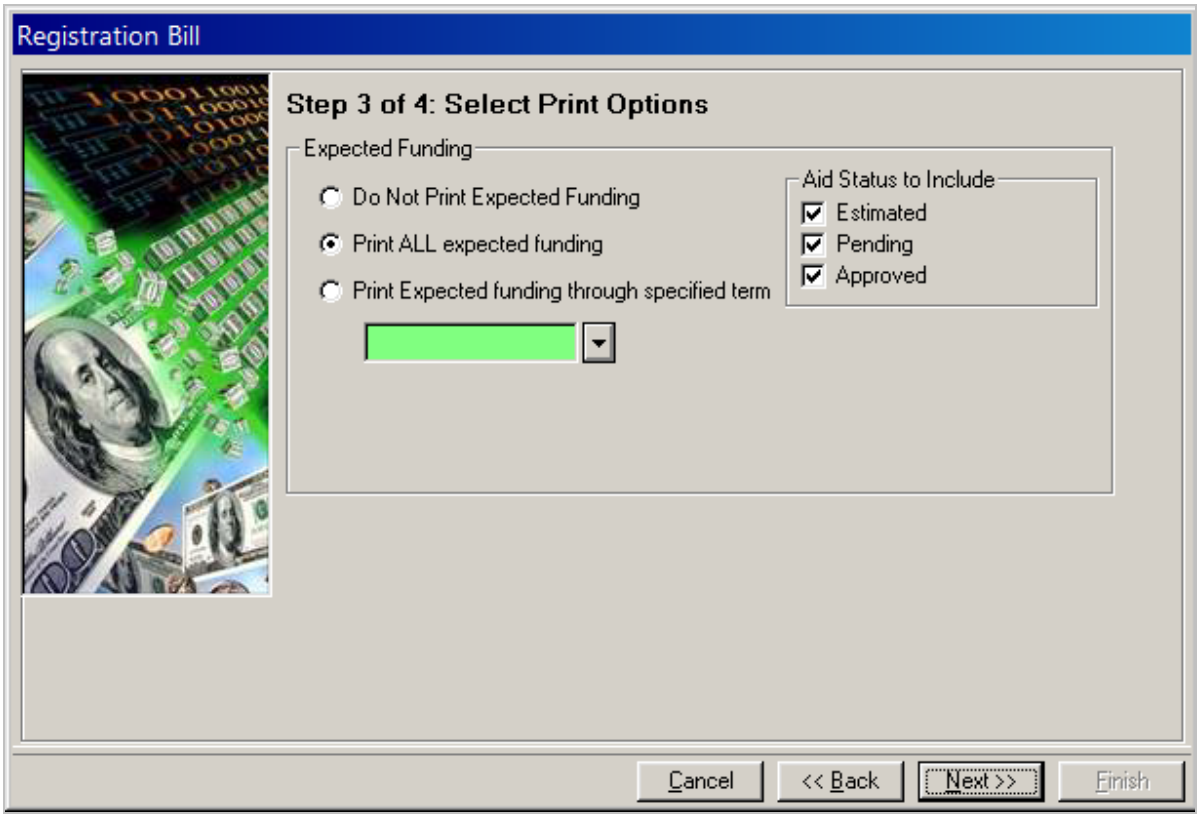
   If you select **Payment Due Date** and **Add/Drop Date**, specify the respective dates.

   Note: Student Class Schedule is enabled only if a single term was selected on the previous form.

9. *Optional*: Enter a **Statement Comment** and **Registration Comment** to print on the student bill. Do not use special characters like & and < in your comments.
10. *Optional*: Select **Subsidiary Ledger**. If this option is selected, the report will include a sub report showing the

subsidiary information for the enrollment. For single or multiple enrollments, the subsidiary ledger information is printed for the Summary Registration Bill and the Detail Registration Bill.

11. Click **Next**. Step 3 of the Registration Bill wizard is displayed.



12. Select appropriate funding and aid status options to print on the registration bill.

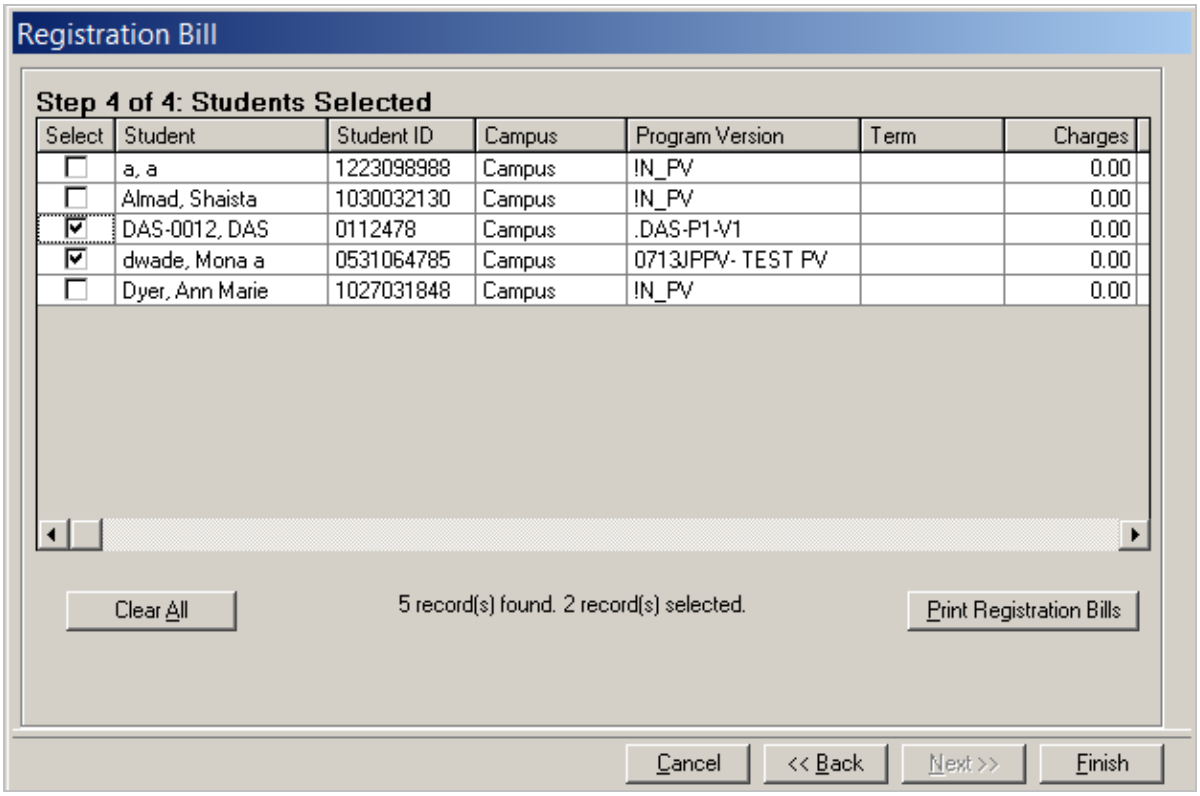
    The Billing Information group determines the charges source. Aid to be included is determined by the check boxes in this group.

    If you select **Print Expected funding through specified term**, you can specify only one term. CampusNexus Student gathers disbursements that have an expected date on or before the end date of the term selected.

    The Balance Options group allows you to specify whether the Summary and Detail reports are to be filtered based on positive, negative, and/or zero student balances.

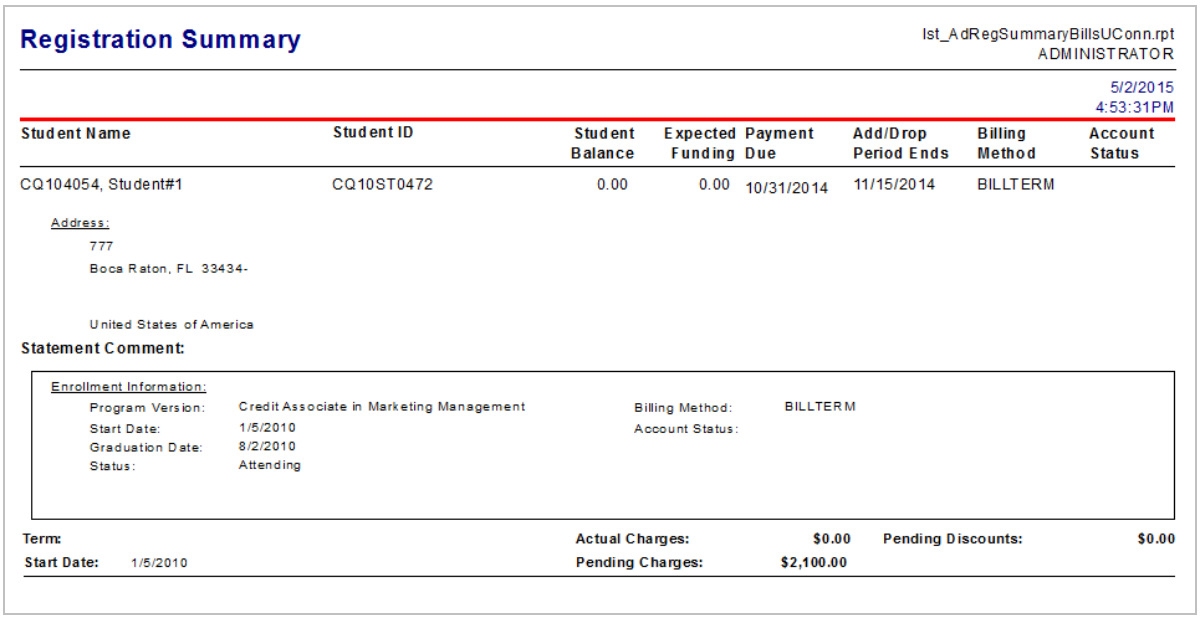
    Note: The configuration settings for Balance Options in the Registration Bill wizard override the settings in the Registration Bill Defaults.

13. Click Next. Step 4 of the Registration Bill wizard is displayed.



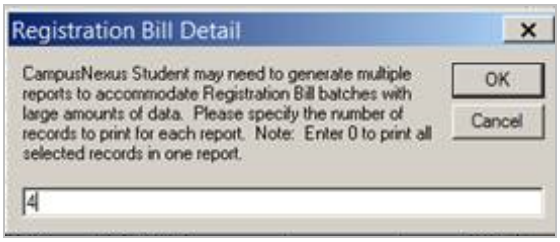
14. The Students Selected grid lists students, their enrollment, and charges. The charges column lists the Actual/Expected charges calculated for each student for the terms specified. Click the **Select** column for the students you want to include in the registration bill.

15. Depending on the settings in Registration Bill Defaults, you can print Summary or Detail bills. If only the Summary option or only the Detail option was configured in the default settings, the Print button is labeled **Print Summary Registration Bills** or **Print Detail Registration Bills**, respectively. If both Summary and Detail were configured as default settings, a pop-up menu appears when you click the Print button.



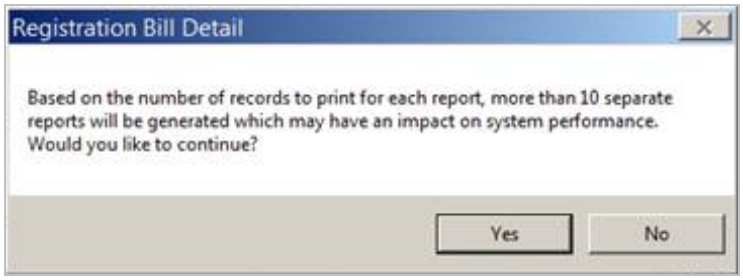
16. Click **Finish** or **Cancel** to close the form.

17. If you are printing **Detail Registration Bills**, after clicking **Print Registration Bills**, you have the choice to print all selected students to a single Crystal Report or to print the selected students in smaller batches as multiple reports. Printing multiple reports can avoid issues with system performance if the amount of selected data for a single report is extremely large.



Enter the number of desired records to be displayed on each generated report in provided field. This must be a whole number and not exceed the total number of records selected. Entering 0 prints all selected records in a single report.

If the number entered by the user generates more than 10 reports, a warning message is displayed:



Users can chose Yes and continue or chose No to cancel and re-enter a new number of records.

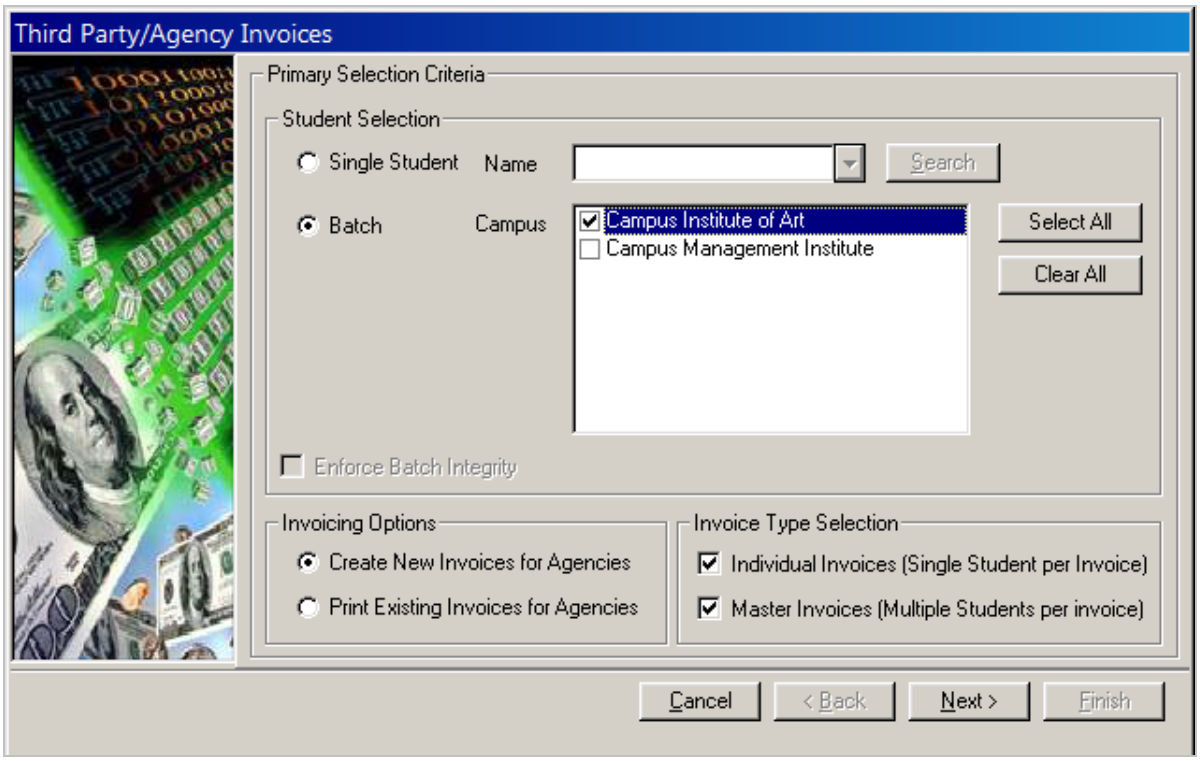
Third Party/Agency Invoices

Use this feature to generate invoices for third parties that have been set up as active agencies associated with your institution. You can generate invoices for more than once campus per agency, and post payments (after approved by Financial Aid) to multiple campuses if the batch contains disbursements generated from multiple campuses using the Third Party - Agency Invoices Approval wizard.

For details on setting up an agency, refer to Agency - Third Party.

To generate a third party invoice:

1. Navigate to **Daily > Student Accounts > Third Party/Agency Invoices**. The Primary Selection Criteria form of the Third Party/Agency Invoices wizard is displayed.



2. To generate invoices for a single student, select **Single Student** and specify the **Name** of the student..

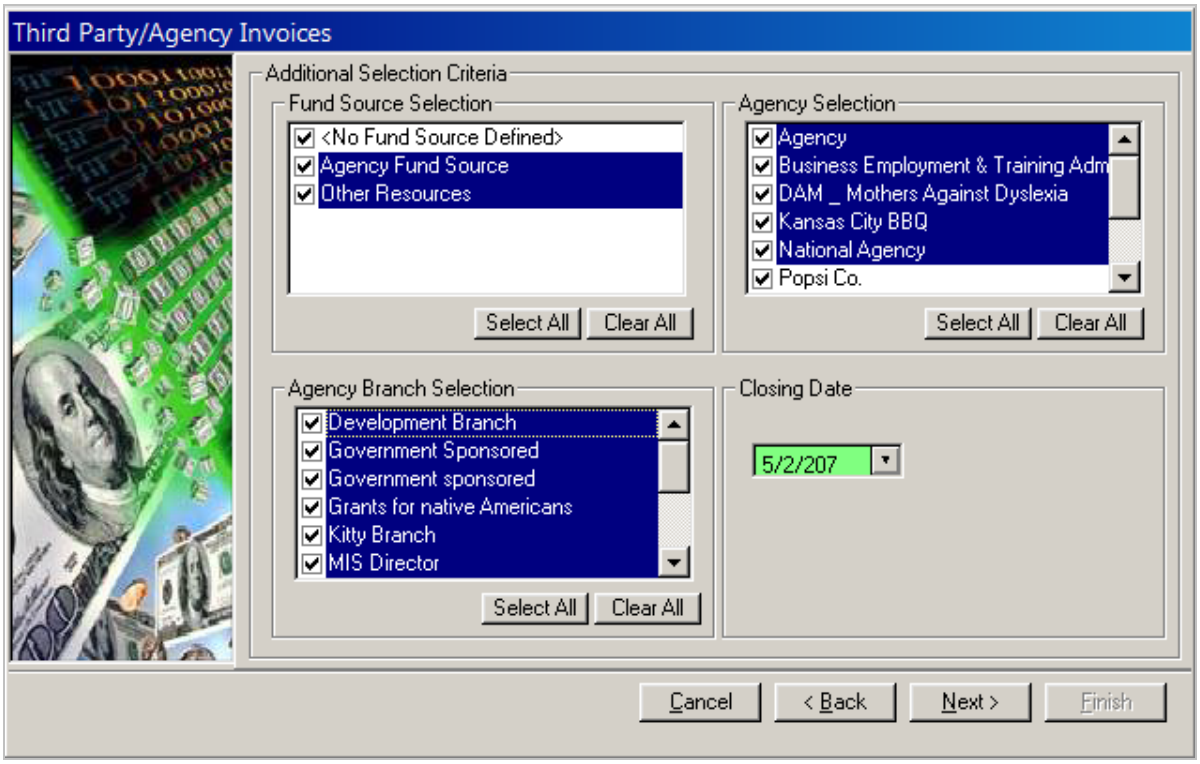
   If a student name appears in the Recent Students field, that student's name is displayed. If that student is not affiliated with an agency branch, a message is displayed. Click **Search** to find the another student.

3. To generate invoices for a multiple students, select **Batch** and select the applicable campuses from the **Campuses** list.

4. Select **Create New Invoices for Agencies** or **Print Existing Invoices for Agencies** from the Invoicing Options.

5. Select whether the invoice will be an **Individual** or **Master** invoice.

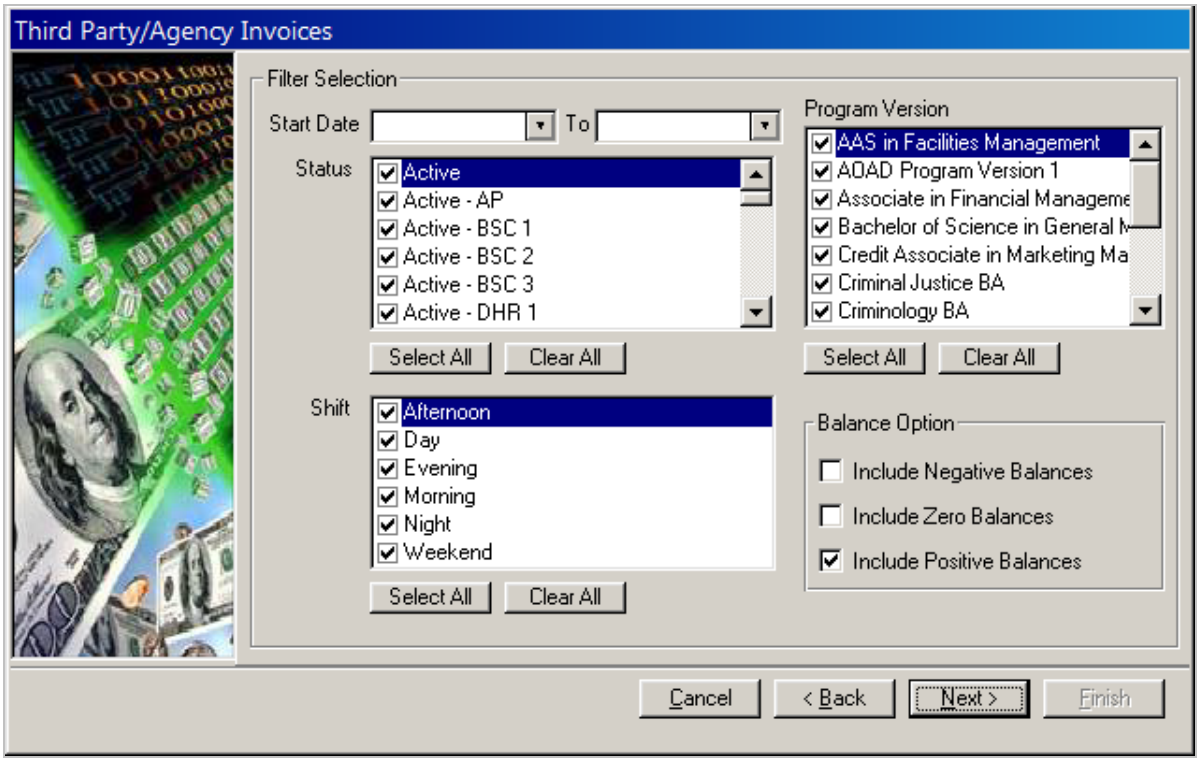
6. Click **Next**. The Additional Selection Criteria form is displayed.



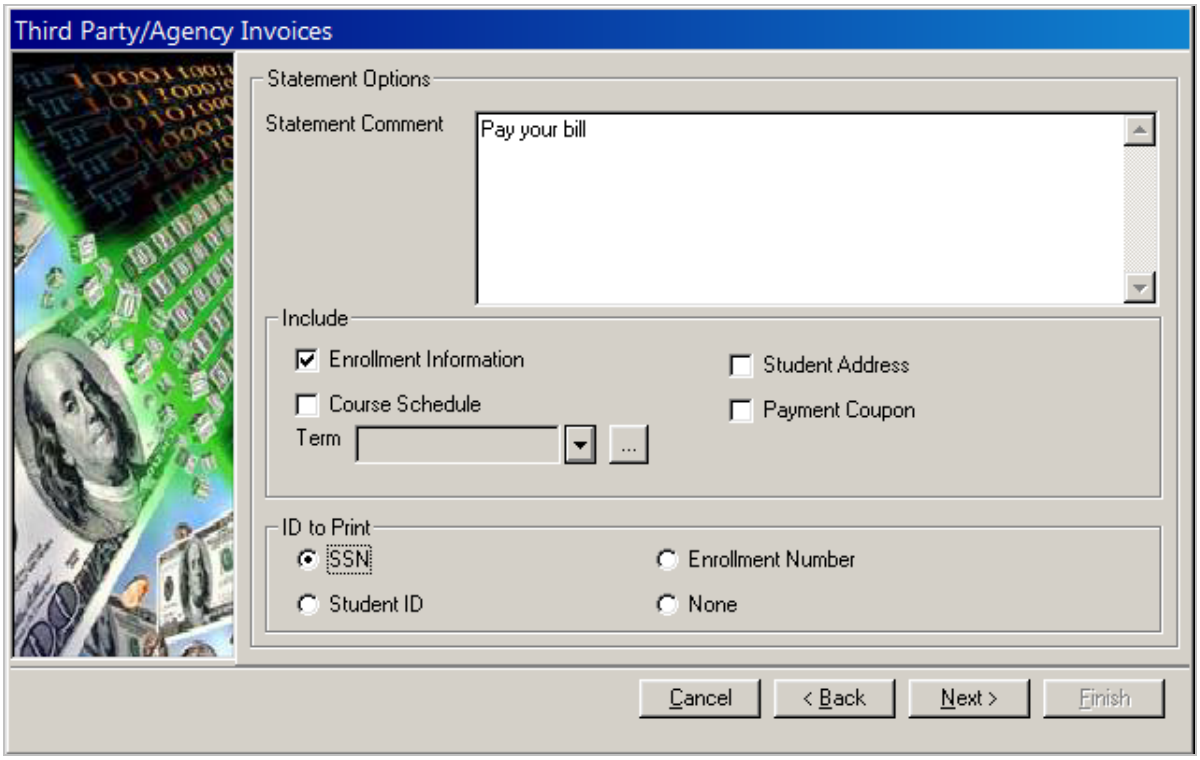
7. Select a **Closing Date**. This is the end date for billing.

   Note: Lists are filtered by the relationships set up between **Fund Source**, **Agency**, and **Agency Branch**. If you choose a fund source that has not been associated with any agencies, no options are displayed in the selections for **Agency** and **Agency Branch**.

8. Select a **Fund Source**. Select or clear all fund sources, or select individual fund sources.
9. Select an **Agency**. Select or clear all fund sources, or select individual fund sources.
10. Select an **Agency Branch**. When you select an agency that has branches, its branches are displayed in this field. If you choose an agency that has branches, you must choose specific branches. Select or clear all fund sources, or select individual fund sources.
11. Click **Next** or click **Back** to return to the previous form. The Filter Selection form is displayed.



12. Select the **Start** and **To** dates.
13. Select the **Statuses**you want to include in this billing.
14. Select the **Program Versions** you want to include in this billing. The list displays all available Program Versions at your institution.
15. Select the **Shifts** you want to include in this billing.
16. Select the **Balance options** you want to include in this billing. You may designate any combination of these options.
    - Include Negative Balances
    - Include Zero Balances
    - Include Positive Balances.
17. Click **Next**. The Statement Options form is displayed.



18. Enter a **Statement Comment**. This is any school-defined text that you want to appear on all invoices. You can prevent users from editing this field.

19. Use the Include check boxes to include or omit **Enrollment Information**, **Student Address**, **Course Schedule**, and **Payment Coupon**.

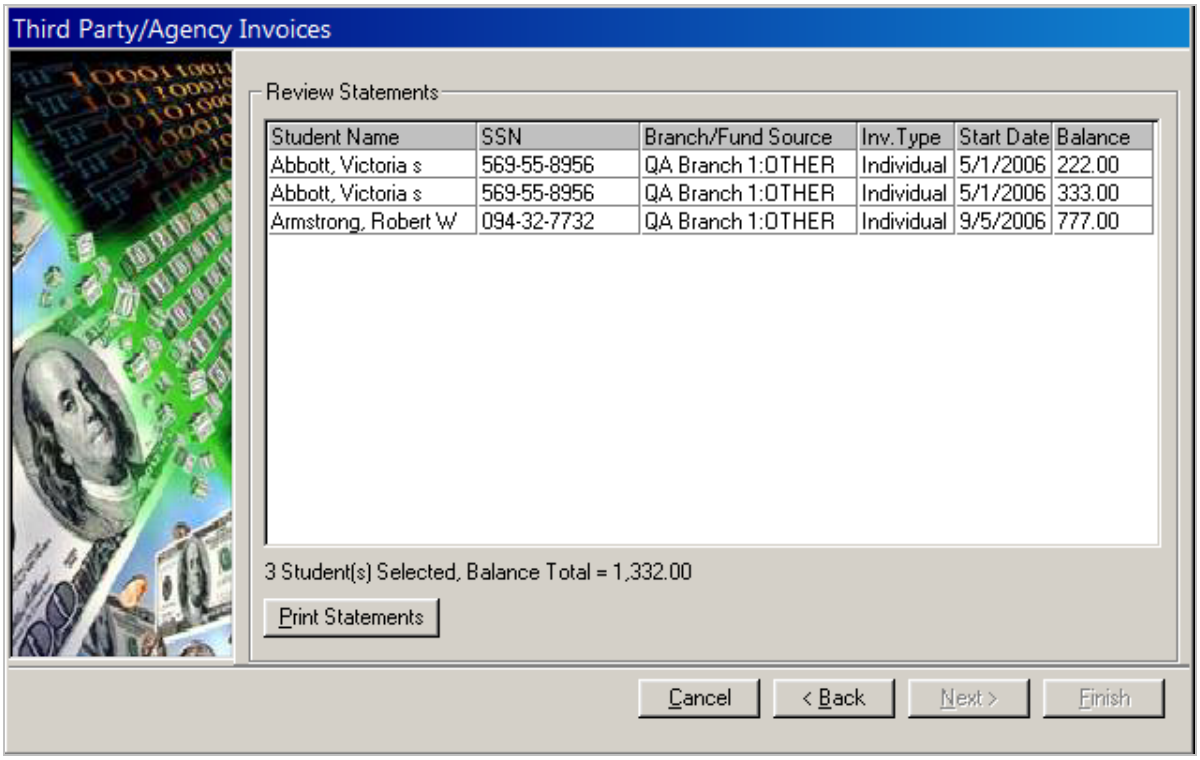
    The **Term** list is enabled when **Course Schedule** is selected.

    Only **Payment Coupon** is available when printing a master invoice. The **Remittance Address** will be used on the return coupon, if configured, when the Payment Coupon option is selected.

20. Select an **ID to print**. This is a school-defined way of identifying students.

    Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

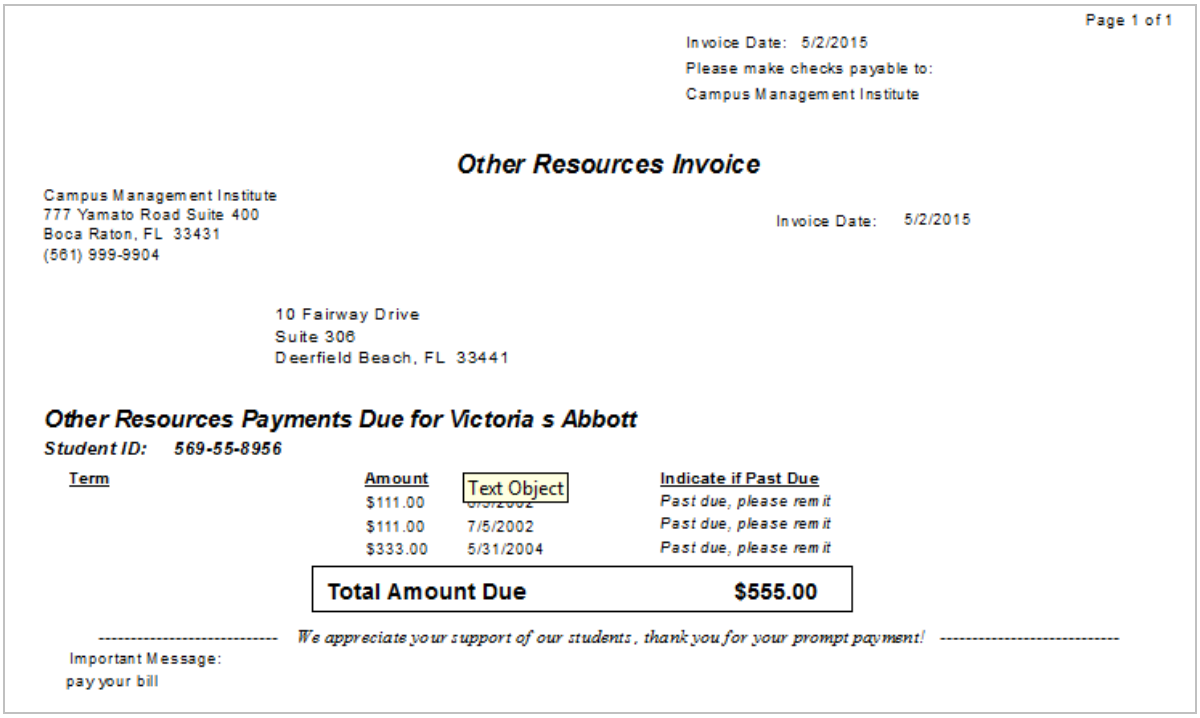
21. Click **Next**. The Review Statements form is displayed.



22. Click **Print Statements** to generate the invoices. (The button is disabled if no students meet your criteria for billing, the button is disabled.)

    Note: Printing an Agency Payment Invoice creates a Financial Aid batch that can be accessed by navigating to Daily > Financial Aid > Approve Disbursements to Pay. These payments can also be posted to student Ledger Cards after the invoice has been created and approved.

23. The invoice is displayed in the Report Viewer. Check the details of the invoice.



Page 1 of 1

Invoice Date: 5/2/2015
Please make checks payable to:
Campus Management Institute

Other Resources Invoice

Campus Management Institute
777 Yamato Road Suite 400
Boca Raton, FL 33431
(561) 999-9904

Invoice Date: 5/2/2015

10 Fairway Drive
Suite 306
Deerfield Beach, FL 33441

Other Resources Payments Due for Victoria s Abbott

Student ID: 569-55-8956

Term	Amount	Text Object	Indicate if Past Due
	$111.00		Past due, please remit
	$111.00	7/5/2002	Past due, please remit
	$333.00	5/31/2004	Past due, please remit

Total Amount Due **$555.00**

We appreciate your support of our students, thank you for your prompt payment!

Important Message:
pay your bill

24. In the Review Statements form, select **Yes** to indicate if the invoices printed correctly and click **Finish** to exit the wizard.

    If you select **No**, the **Print Statements** button and the **Back** button are enabled so that you can change the selections and print the invoice again.

Note: To ensure that the **Student Payment Statement** is sent out on a regular basis, the date that the last Student Payment Statement was printed for each payment plan is displayed in the **Last Statement Date field** in the Last Statement column of the form. The Last Statement date field on the schedule is updated when the student statement process is completed. The Last Statement date field is **only** updated for Student and Agency Payments with a Fund Source type of 'Cash'. This date field is updated with the system date when you confirm that the statements were printed correctly and click the **Finish** button in the Third Party/Agency Invoices wizard. You can then reference the Last Statement date field on the Payment Schedule form.

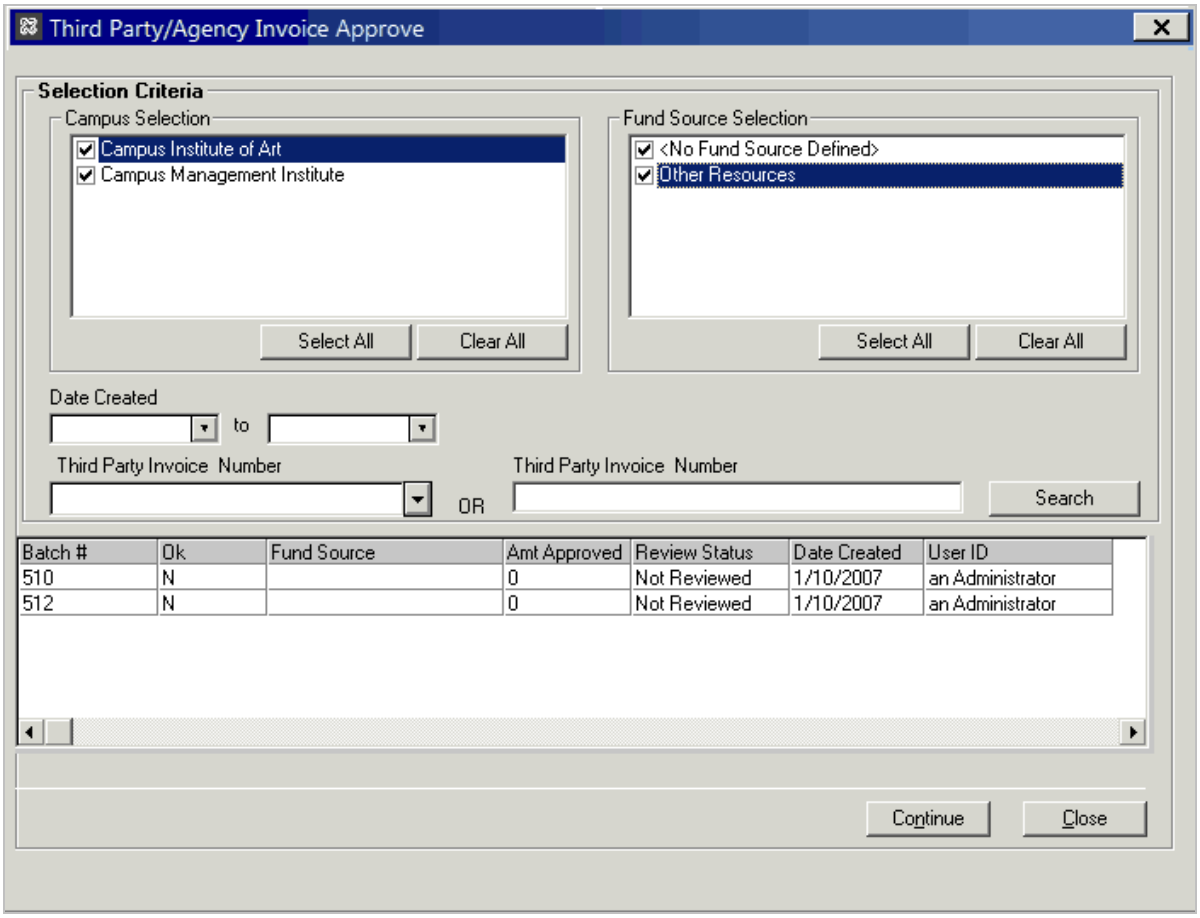
Third Party/Agency Invoice Approval

This feature enables users to approve invoices for third parties that have been set up as active agencies associated with your institution.

For details on setting up an agency, refer to Agency - Third Party. For details on generating invoices, see Third Party Agency Invoices.

To generate a third party invoice:

1. Navigate to **Daily > Student Accounts > Third Party/Agency Invoices Approval**. The Selection Criteria form of the Third Party/Agency Invoices Approve wizard is displayed.

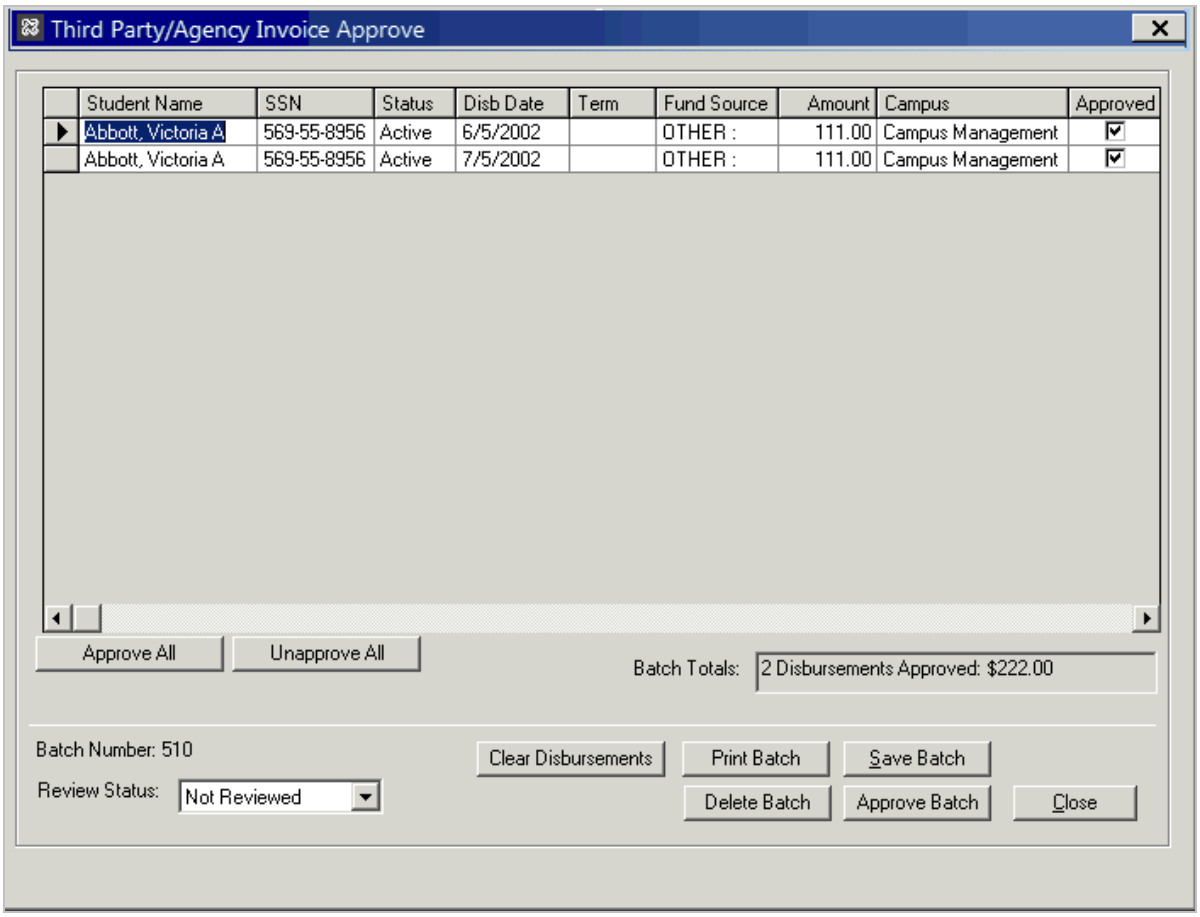


2. Select the applicable campuses from the **Campus Selection** area.
3. Select the applicable fund sources from the **Fund Source Selection** area.
4. Select a date range from the **Date Created** drop-down lists.
5. Select a **Third Party Invoice Number** from the drop-down list.
6. You can choose to enter a portion of a **Third Party Invoice Number** in the data entry field and click **Search**.
7. The Batch #, OK indicator, Fund Source, Amount Approved, Review Status, Date Created and User ID for each

agency invoice appear. Select an invoice to approve and click the **Continue** button.

8. The student's name, student ID, status, disbursement date, term, fund source, amount, campus are displayed, along with an **Approve** check box. Click **Approve All** or **Unapprove All** to approve or unapprove *all* invoices listed.

   Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.



9. Select a **Review Status**.

10. The **Clear Disbursements**, **Print Batch**, **Save Batch**, **Delete Batch**, and **Approve Batch** buttons work exactly the same as regular financial aid approve disbursements to pay buttons of the same name. Select the appropriate button.

    Notice that there is no Auto Approve functionality for agency disbursement approvals.

11. Click **Close** to return to the previous screen, where you may select another batch to process.

Bank Deposits

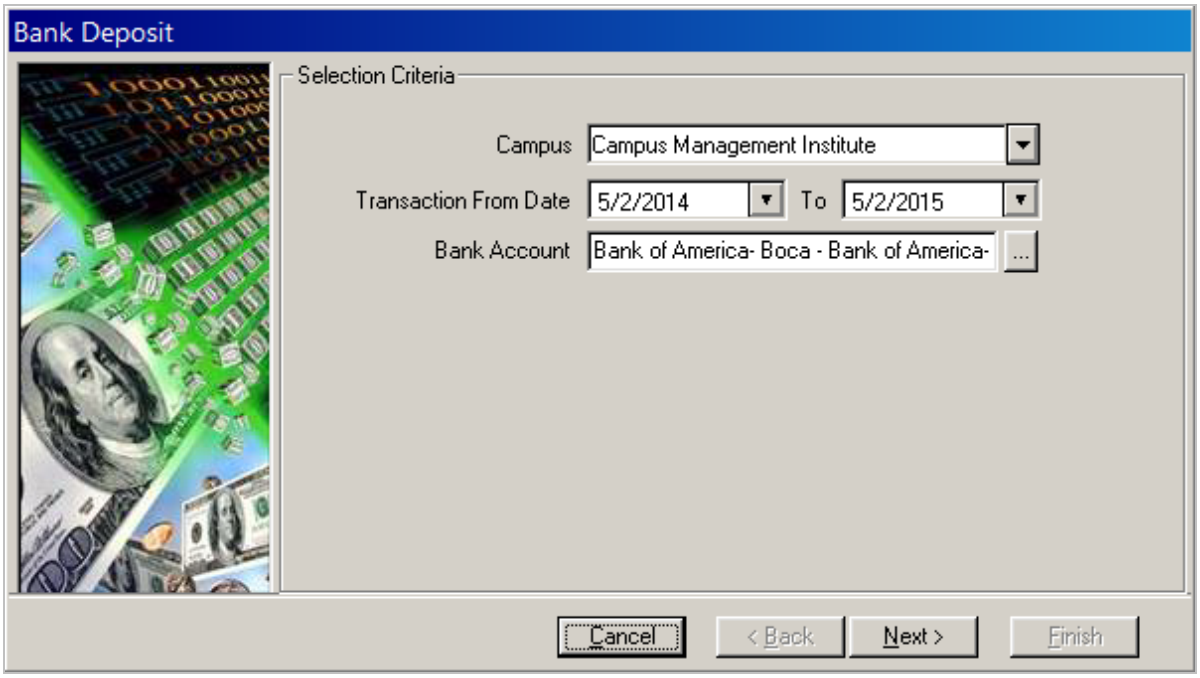
As you accept and post payments during your daily activities, CampusNexus Student keeps records to print a bank deposit report. At the end of the day, when the last payment transactions have been processed, you can run the Bank Deposit report to take to the bank with your receipts or to use for the preparation of a deposit slip.

If CampusNexus Student is integrated with an accounting system, refer to Release to Integrated Accounting System.

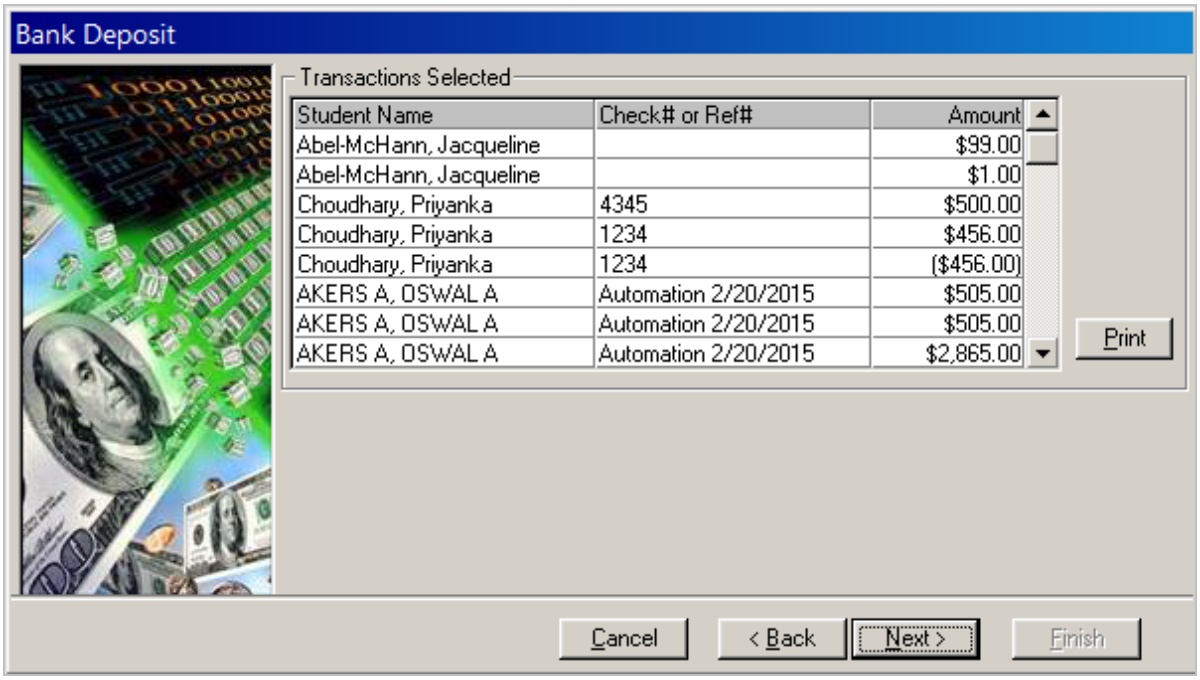
Note: It is not necessary to print the Bank Deposit Report every day. The triggering dialog gives you the opportunity to enter the beginning and ending dates of receipt transactions to be included in the deposit. CampusNexus Student does not list any receipt that has already been marked as deposited.

To prepare the Bank Deposit:

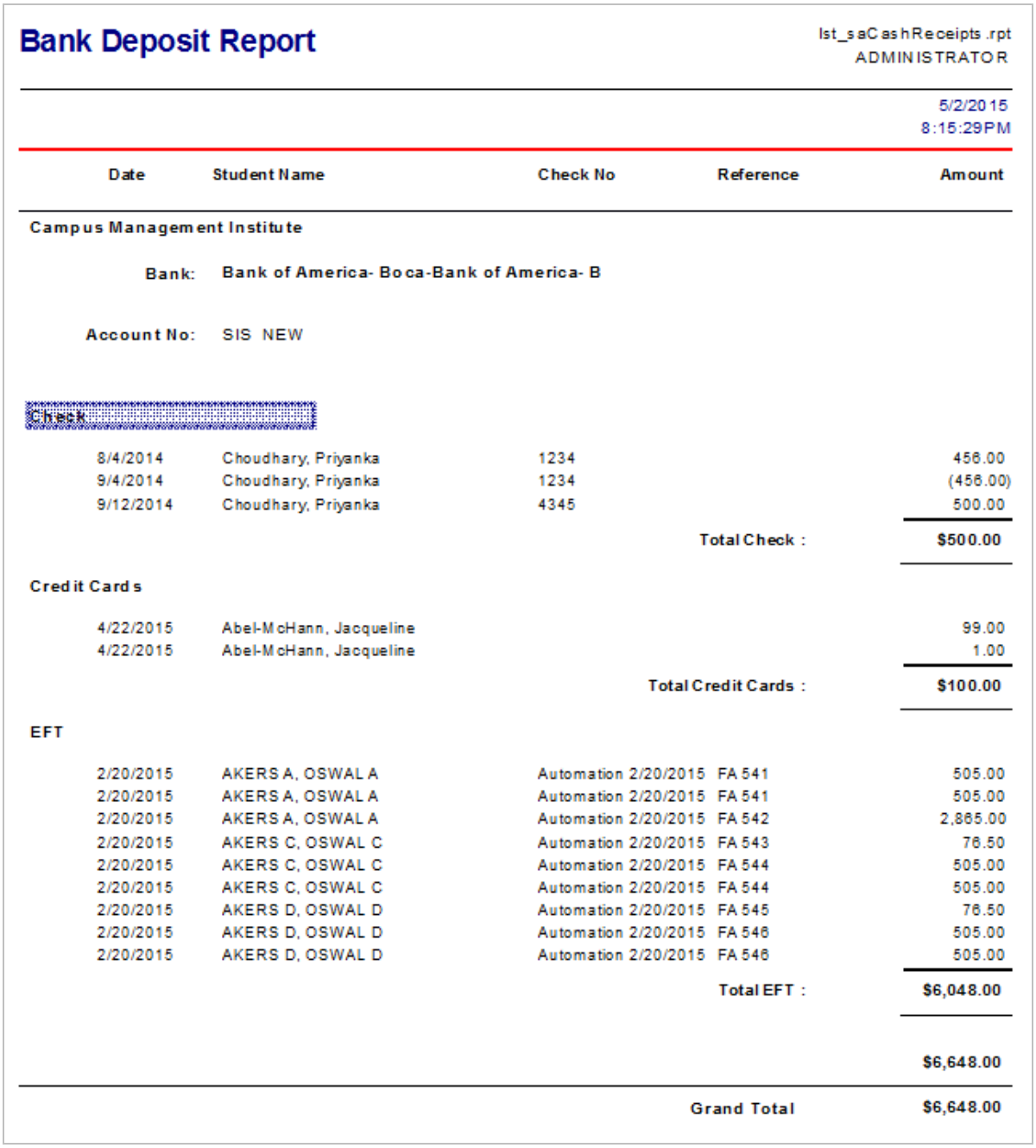
1. Navigate to **Daily** > **Student Accounts** > **Bank Deposits**. The Bank Deposits form is displayed.



2. Select the **Campus** for which the deposit is being prepared. CampusNexus Student selects the campus in which you are logged in as the default.
3. Enter or select the **Transaction From Date** range.
4. Select the **Bank Account** from the list or use the **Search** button.
5. If cashiering is in use, select a one or more cash drawers. This indicates that you want to deposit the contents of the cash drawers. For more details about managing cash drawers, refer to Cash Drawer Session Management.
6. Click **Next**. All transactions that qualify for the deposit will be selected, including any payments posted to sub-sidiaries, and listed on the next page of the form.



7. Click **Print** to print the Bank Deposit Receipts report. This report can serve as the deposit slip at some banks.



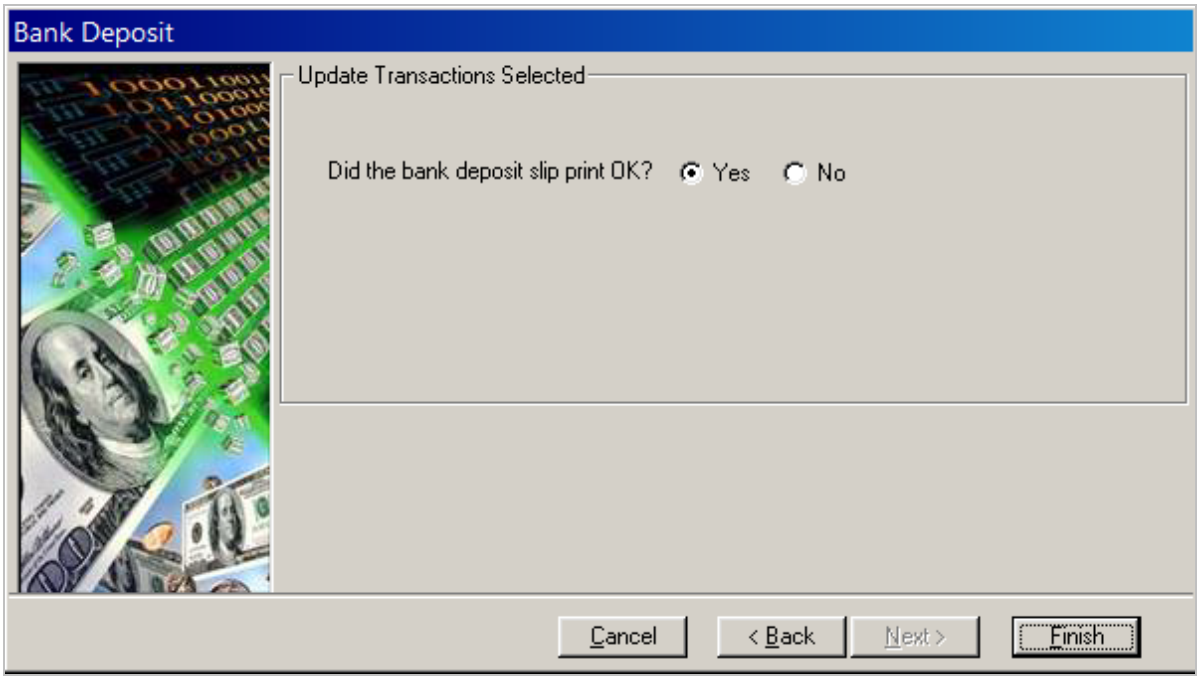
Bank Deposit Report

lst_saCashReceipts.rpt
ADMINISTRATOR

5/2/2015
8:15:29PM

Date	Student Name	Check No	Reference	Amount
Campus Management Institute				
Bank:	**Bank of America- Boca-Bank of America- B**			
Account No:	SIS NEW			
Check				
8/4/2014	Choudhary, Priyanka	1234		456.00
9/4/2014	Choudhary, Priyanka	1234		(456.00)
9/12/2014	Choudhary, Priyanka	4345		500.00
			Total Check :	**$500.00**
Credit Cards				
4/22/2015	Abel-McHann, Jacqueline			99.00
4/22/2015	Abel-McHann, Jacqueline			1.00
			Total Credit Cards :	**$100.00**
EFT				
2/20/2015	AKERS A, OSWAL A	Automation 2/20/2015	FA 541	505.00
2/20/2015	AKERS A, OSWAL A	Automation 2/20/2015	FA 541	505.00
2/20/2015	AKERS A, OSWAL A	Automation 2/20/2015	FA 542	2,865.00
2/20/2015	AKERS C, OSWAL C	Automation 2/20/2015	FA 543	76.50
2/20/2015	AKERS C, OSWAL C	Automation 2/20/2015	FA 544	505.00
2/20/2015	AKERS C, OSWAL C	Automation 2/20/2015	FA 544	505.00
2/20/2015	AKERS D, OSWAL D	Automation 2/20/2015	FA 545	76.50
2/20/2015	AKERS D, OSWAL D	Automation 2/20/2015	FA 546	505.00
2/20/2015	AKERS D, OSWAL D	Automation 2/20/2015	FA 546	505.00
			Total EFT :	**$6,048.00**
				$6,648.00
			Grand Total	**$6,648.00**

8. After printing the Bank Deposits report, close the report form.
9. Click **Next** on the Bank Deposit form. The last page of the wizard is displayed.



10. If you select **Yes** to answer to the question "Did the bank deposit slip print okay?" and click **Finish**, CampusNexus Student marks the listed transactions as deposited.

    If you select **No**, click **Finish** to end the procedure without depositing the transactions, or click **Back** to return to the previous page of the wizard.

Edit/Cancel Scheduled Refunds

The Edit/Cancel Scheduled Refunds form displays scheduled refunds and enables you to edit or delete them. You can set up and process refunds through ACH. Also see Process Refunds/Stipends, Process Electronic Drafts, Refund Policies, and Refund Check Registry.

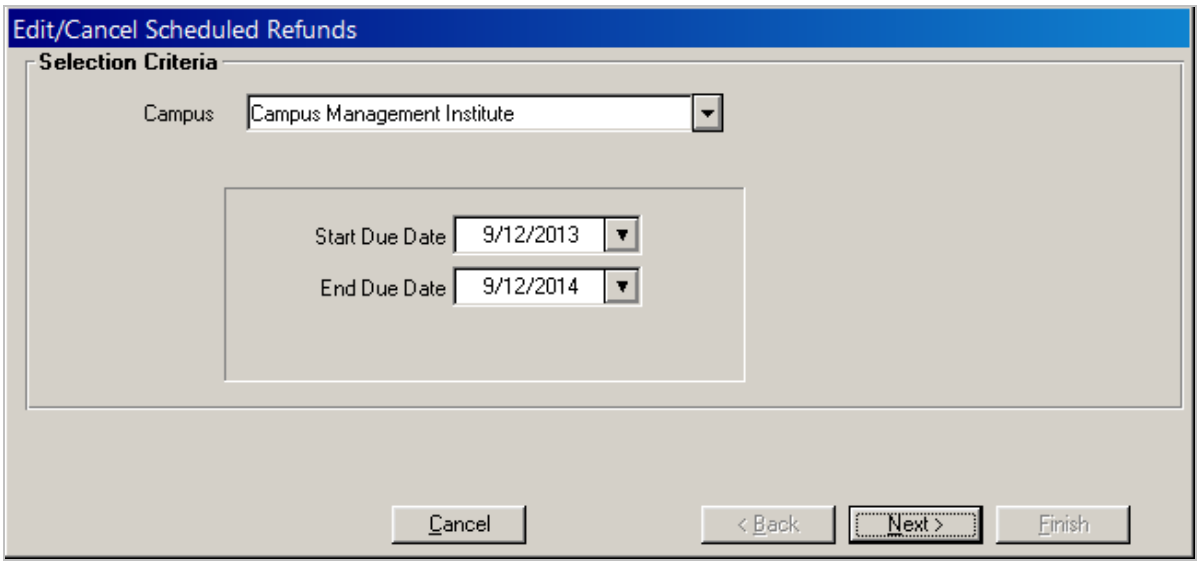
The scheduled refunds listed in this form are disabled if you do not have *Edit Scheduled Refund* permissions.

- The *Edit Payee* button is disabled if you do not have *Edit Payee on Scheduled Refund* permissions.
- The *Delete Refund* button is disabled if you do not have *Delete Schedule Refund* permissions.

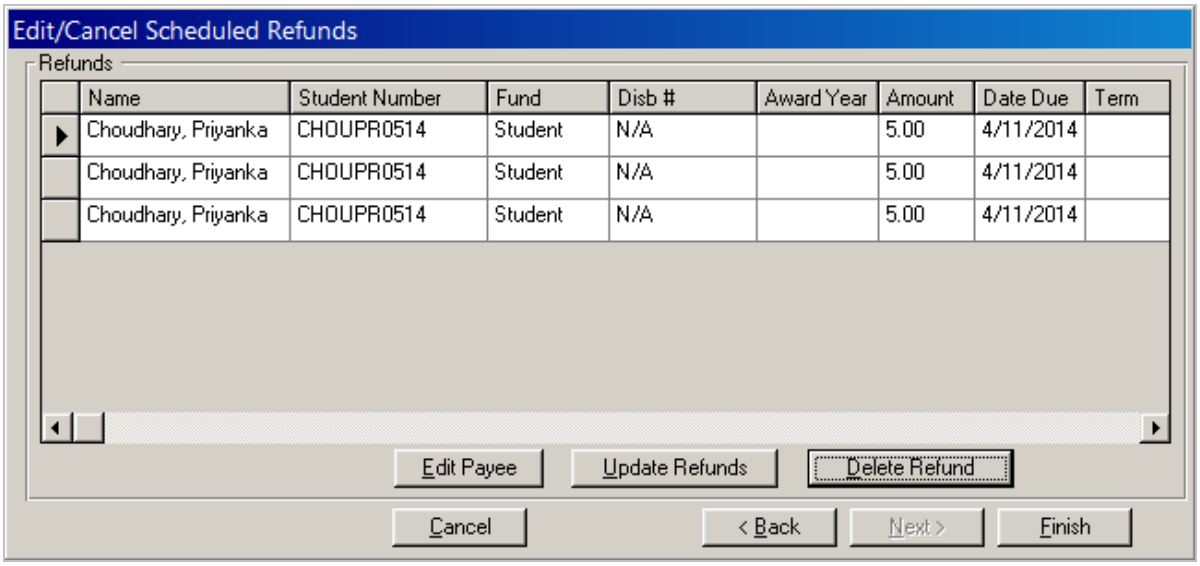
To edit or cancel scheduled refunds:

Note: Since there are several places to access refunds and stipends in CampusNexus Student, multiple users might try to change one record at the same time. To prevent conflicts, CampusNexus Student locks the record being updated. If another user tries to access the record, a message indicates that the record is locked along with the name of the user. The lock is released when the user closes the form. In certain scenarios, a system administrator may need to clear a locked stipend or refund record. For more information, see Unlock Refunds/Stipends.

1. Navigate to **Daily** > **Student Accounts** > **Edit/Cancel Scheduled Refunds**. The first page of the Edit/Cancel Scheduled Refunds wizard is displayed.



2. Select the **Campus** for which you want to edit or cancel refunds.
3. Select the **Start Due Date** and **End Due Date**.
4. Click **Next >** to continue. The second page displays all refunds that are scheduled for the Campus within the selected Due Date. Scroll to the right to see all columns of the grid.



Note: The combo box in the **Pmt Period** column is available for enrollments with program versions that can use payment periods (program versions with academic calendars 1, 5, and 6). The grid contains a visible column for Payment Period and a hidden column for Academic Year. The availability of the Payment Period combo box depends on the Academic Calendar of the current row. If the Academic Calendar on the selected row is not 1, 5, or 6, the control is locked. If there are no records for a given student, the column is disabled. The notation for Payment Periods is `AY<n>|PP<m>` where `<n>` is the academic year sequence number and `<m>` is the payment period sequence number.

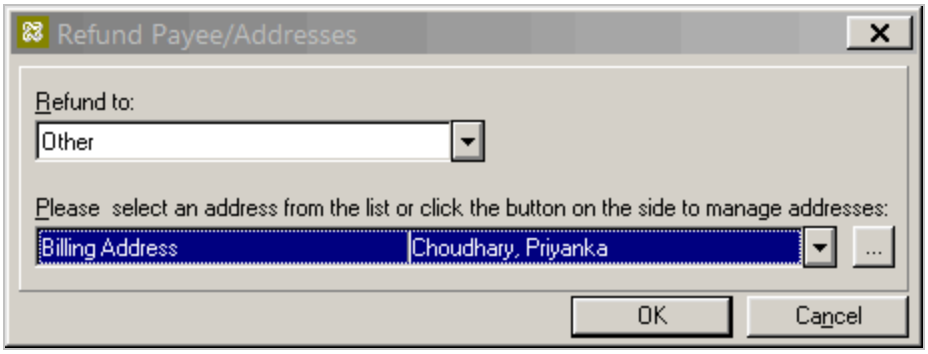
The Action Date is populated only for Direct Loans as Fund Source, and is calculated based on date of the disbursement + 120 days.

5. You can edit the **Amount**, **Due Date**, and **Return Method** of records in the grid.

   The available return methods are Net, EFT, Check, or Master Check. If the fund source is Student, the only return method available is Check.

6. Click **Update Refunds** and click **OK** on the confirmation message.

7. Click **Edit Payee** if you want to change the payee/address. Select appropriate values and click **OK** and confirm the change.



8. To remove the refund from the list, select a row, and click **Delete Refund**. A confirmation message is displayed. Click **Yes** to proceed.

9. Click **Finish** to complete the changes and update the affected tables.

Audit Features

The audit features for Student Accounts include:

- CampusNexus Student stores the name of the payee on each refund record, stipend record, and subsidiary refund so that it can be retrieved for reporting purposes.
- CampusNexus Student audits changes to the payee for refunds and stipends. Auditing occurs from the time the refund or stipend is scheduled to the time the refund or stipend is processed. The date changed, time changed, and the user who made the change are audited.
- Payee changes are audited for subsidiaries.
- Payee information for a stipend can be edited regardless of the fund source associated with the stipend. The payee changes are audited for all stipends.
- Your ability to edit a payee for a refund is dependent on the fund source associated with the refund. The payee changes are audited only for the fund sources that allow the payee to be changed.
- You can sort on different columns of the grids available in the Process Refunds/Stipends wizard.
- A student account administrator can define that the Reference information is printed on the check, below the address, or on the stub, or in both places.
- A student account administrator can view the ID of the user who scheduled the refund/stipend using the Ledger Card, Transaction Detail button.
- CampusNexus Student stores the user ID of the user who scheduled the stipend so that it does not get overwritten by the user ID of the user who posted the stipend.

Process Refunds/Stipends

The Process Refund/Stipend wizard is used to process scheduled refunds, stipends, and subsidiaries.

- Refunds are monies returned to government agencies and private agencies when a student is in school for a shorter time than the expected period for which the student is receiving a grant or loan.
- Stipends are monies from financial aid fund sources to the student to help with the living expenses related to attending an institution.
- Subsidiaries are monies designated for miscellaneous expenses such as meal plans, housing, parking, and so. These expenses are tracked on the subsidiary ledger.

Refund and stipend transactions are recorded on the student ledger. Refunds and stipends may be processed through the Automated Clearinghouse (ACH) if the campus is set up for ACH and the student elects Direct Deposit. Subsidiaries are transactions separate from the student ledger, such as housing deposits.

Integration with an Accounting System

If your CampusNexus Student system is integrated with an accounting system, please refer to Release to Integrated Accounting System for information on processing refunds, stipends, and subsidiaries.

Integration with CampusNexus Finance, HR & Payroll

When CampusNexus Finance, HR & Payroll is integrated with CampusNexus Student, the following applies:

- The check printing functionality for refunds, stipends, and subsidiaries is disabled in CampusNexus Student. For more information, see Stipend and Refund Check Printing (CampusNexus Finance, HR & Payroll).
- Negative amounts cannot be entered when payments or refunds are created or edited in CampusNexus Student.
- For the EFT or Net return methods for refunds and stipends such as grants, loans, or student payments that are scheduled (see To process scheduled stipends, refunds, or subsidiaries) or posted directly (see Post Individual Refunds and Post Individual Stipends).
    - CampusNexus Student disregards that the return method of Net uses check number 0 for stipends and refunds. A check number must be specified for individual stipends and refunds.
    - CampusNexus Finance, HR & Payroll does not treat the return as a pending check.
    - The return is posted to the A/R balance in CampusNexus Finance, HR & Payroll as soon as it is processed.
    - When a refund or stipend transaction with the return type of Net is released from CampusNexus Student, CampusNexus Finance, HR & Payroll creates the related vouchers, shows the transaction on the student ledger and under the bank against which the transaction was processed.
    - The payment method cannot be changed by a user in CampusNexus Finance, HR & Payroll.

      Note: CampusNexus Finance, HR & Payroll provides payment methods mapping for payments and disbursements in Accounts Receivable (AR). The mapped payment methods include:
        - Cash
        - Check
        - Credit Card
        - EFT

- Non-Cash
- ACH

For transactions which do not have a payment method mapping in CampusNexus Student, errors are displayed during Release to General Ledger (GL). Unmapped transactions are not created in CampusNexus Finance, HR & Payroll. The exceptions are logged in CampusNexus Student and in CampusNexus Finance, HR & Payroll. Users cannot remove or change the payment method mapping in the Setup screen if there are transactions marked for posting that correspond to that payment method.

CampusNexus Finance, HR & Payroll supports the integration of ACH and Credit Card Transactions from CampusNexus Student to CampusNexus Finance, HR & Payroll. ACH and Credit Card transactions created in CampusNexus Student will appear in CampusNexus Finance, HR & Payroll.

CampusNexus Finance, HR & Payroll enables you to print checks with a breakup of the check stub details. If multiple checks are identified in the print job, each check and its breakup can be printed separately.

The check stub details are printed in a tabular format containing the following columns:

- Check stub line number
- Student ID
- Student full name
- SSN (see **Note***)
- Fund source
- Amount

Note*: The social security number (SSN) field is shared when CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll. Permission is required to view the SSN in CampusNexus Finance, HR & Payroll. A user without view permission for the Personal Identification form cannot print a check stub with SSN. The SSN cannot be edited in CampusNexus Student.

A check box in the Report Parameter/Report Dialog window determines if the SSN is used for check stub printing. A user without permission to view SSN cannot print a check stub with SSN.

CampusNexus Finance, HR & Payroll supports mass printing of pending checks. You can select multiple transactions and print multiple checks all together in one batch. You can also group checks to generate a single check for multiple transactions to be paid to the same payee. Be careful to select and include only those transactions that belong to the same bank. Also note that 'Printer' as a destination is not supported with batch processing of checks.

When CampusNexus Student is configured to use the GL/AP Package 'CampusNexus Finance' (Setup > Student Accounts > General (tab)), the Return method of 'Master Check' is no longer available for Refund transactions (View > Student Accounts > Ledger Cards > Post Refunds); however, users, can create one check for multiple transactions for the same payee.

Since the Return method of 'Master Check' is not available when the systems are integrated, Master check transactions and voids of Master checks are not released to CampusNexus Finance, HR & Payroll. Users who have existing Master check transactions, need to void the Master checks in CampusNexus Student and create check transactions.

Refund Checks

After refund calculations are made and approved, refund checks need to be printed. CampusNexus Student can print the checks and post the transactions to the student's ledger cards. Two laser-printed check formats are available; stub-check-stub and check-stub-stub. Checks cannot be printed on continuous forms at this time.

CampusNexus Student updates the direct loan disbursement file when a batch of FA refunds is posted to student's ledger card using the Print Refund/Stipend Checks option. Each refund that is posted to a student's ledger card is reported to Common Origination and Disbursement (COD). The logic will apply only if you are printing refund checks, not stipend checks. The logic below will be executed as part of the table updates when you click the Post Checks button on the Print Checks form.

For each refund check being printed, CampusNexus Student determines if a row should be added to the direct loan disbursement table. A row is added to the table if the all of the following conditions are met:

- The fund source type of the refund is DIRSUB, DIRUNSUB, or DIRPLUS.
- The Use Direct Loan flag is set to true for the student's campus.

- A row exists in the FA Loan table where the Student Aid ID equals the ID for the FA for which the refund check is being printed.

If Auto create Loan Period Orig. Changes when student Withdraws or Refund is posted? is activated, an origination change is created for the following reasons during the posting of the refund:

- An origination change record is created to reduce the Award Amount to exclude the gross amount of the refund posted.
- For a fully refunded disbursement, an origination change record is created to exclude that disbursement's payment period from the Loan Period, if the disbursement is in a payment period after the initial payment period on the loan.

If there are pending origination changes for the Award Amount or Loan Period End Date that haven't yet been sent to COD, they will be updated to with the corresponding information from the posted refund record.

When the refund checks have been printed, the refund transactions appear in the payments column of the student Ledger Card.

Refer to the instructions on processing scheduled refunds and printing refund checks. For information about posting individual refunds, see Post Individual Refunds.

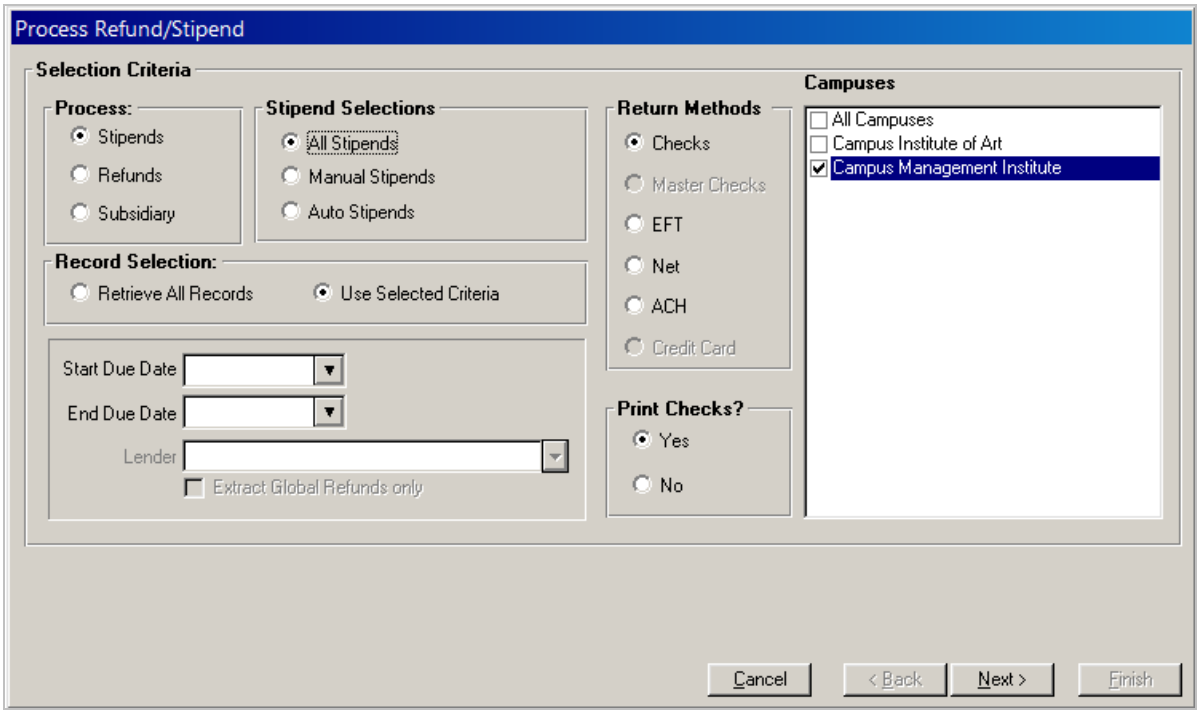
Stipend Checks

Periodically, the Student Accounts department needs to post stipend disbursements to students who are receiving financial aid. Refer to the instructions on processing scheduled stipends and printing stipend checks. For information about posting individual stipends, see Post Individual Stipends.

Note: Stipend schedules are cancelled when a student's status is changed to Drop. When the stipend schedule is cancelled, you can no longer post stipend disbursements to the ledger card.

To process scheduled stipends, refunds, or subsidiaries:

1. Navigate to **Daily** > **Student Accounts** > **Process Refunds/Stipends**. The Process Refund/Stipend wizard is displayed.



2. In the Process section, select **Stipends**, **Refunds**, or **Subsidiary**.

3. If you selected Stipends, in the Stipend Selections area, select **All Stipends**, **Manual Stipends**, or **Auto Stipends**.
4. In the Record Selection area, select **Retrieve All Records** or **Use Selected Criteria**.
    - If you selected Stipends and Use Selected Criteria, the Start Due Date and End Due Date fields are enabled. Specify applicable dates.
    - If you selected Refunds and Use Selected Criteria, the Start Due Date, End Due Date, Lender, and Extract Global Refunds only fields are enabled. Specify the applicable dates and lender. Select **Extract Global Refunds only** if, when a refund is due to SFA, Global shall be notified by CampusNexus Student.
5. In the Return Methods area, select an appropriate option:
    - **Checks** - generates one check for each student.
    - **Master Checks** - indicates that one check is issued to each financial institution for all students associated with that institution.
    - **EFT** (Electronic Funds Transfer) - indicates that the refund is sent to the financial institution electronically.
    - **Net** - designates that the process of returning the funds is handled in the draw down process for the Title IV fund.
    - **ACH** - is available only for students who have elected direct deposit of refunds/stipends directly to their accounts.
    - **Credit Card** - is available for refunds only.

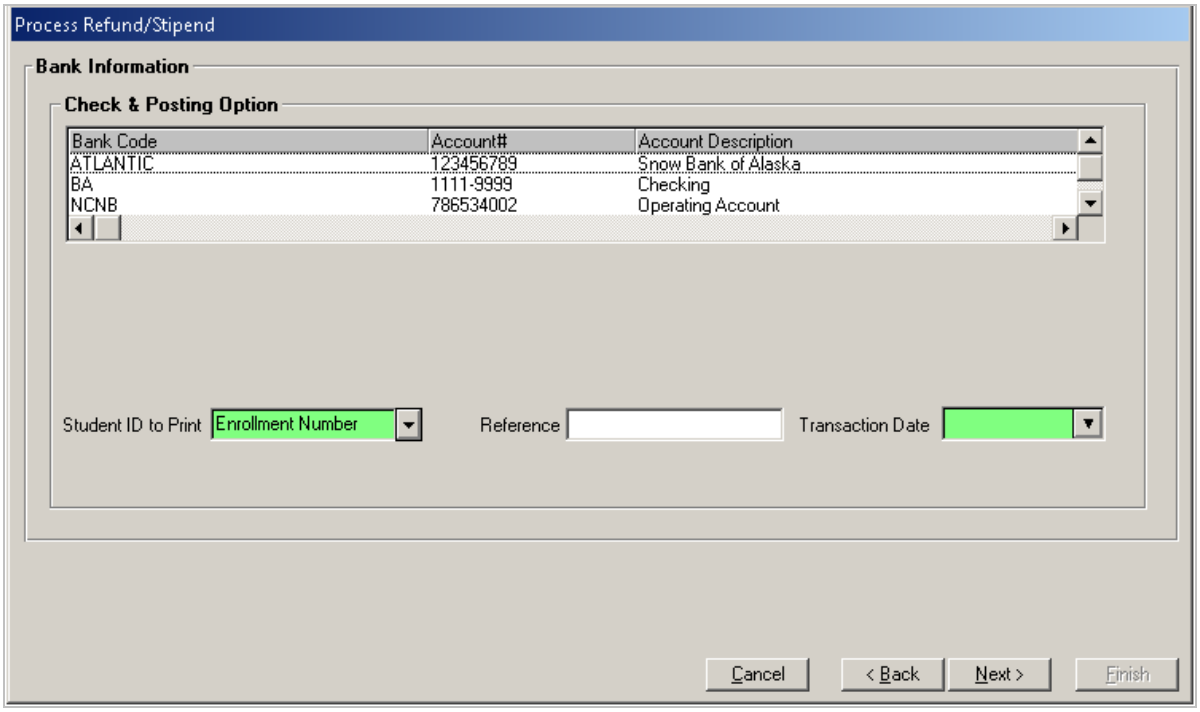
    Checks, EFT, Net, and ACH are enabled for stipends.
    Checks, Master Checks, EFT, Net, ACH, and Credit Card are enabled for refunds.
    Checks, Master Checks, EFT, and Net, are enabled for subsidiaries.

    Note: If a student is being issued more than one stipend, all stipends are consolidated into one check. This rule applies to stipends only; not refunds.
6. In the Print Checks? area, select **Yes** to print checks.

    Select **No** if you post the refunds or stipends in CampusNexus Student and print the checks in some other system such as an Accounts Payable program. This option becomes available if you selected Checks or Master Checks as a return method.

    All checks must pass validation before they are printed, and an exception message is displayed for each check that is not validated. You can access Exception Processing to resolve the issues associated with each check. To learn more about processing checks that fail validation, see Exception Processing Overview.

    Note: When CampusNexus Finance, HR & Payroll is integrated with CampusNexus Student, the check printing functionality for refunds, stipends, and subsidiaries is disabled in CampusNexus Student. For more information, see Stipend and Refund Check Printing (CampusNexus Finance, HR & Payroll).
7. Select appropriate **Campuses**.
8. Click **Next >** to proceed. All processes, except ACH, return the following Bank Information form:



9. Select a **Bank Account**.
10. Select a **Student ID to Print**. The options are Enrollment Number, SSN, Student ID, and None.

    Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.
11. For Master Checks, specify a **Reference** number. The Reference field is optional for other Return Methods.
12. Select the **Transaction Date**.
13. Click **Next>**. Stipend or refund transaction records are displayed.

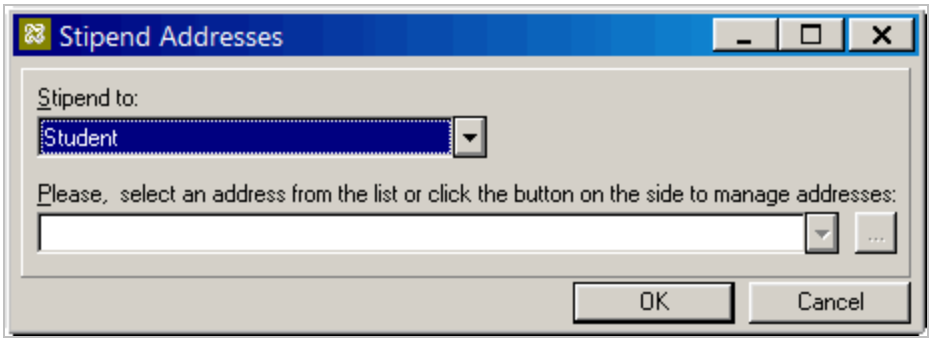
    Note: The notation in the Payment Periods (Pmt Per) column is: `AY<n>|PP<m>` where `<n>` is the academic year sequence number and `<m>` is the payment period sequence number.

    The records are filtered based on your fund source permissions. For example, refunds listed represent the refunds for the fund sources for which you have *Post Refund* permissions.

    Your permission also determine which functions are enabled on the form:

    - The Edit Payee button is enabled if you have Edit Payee on Scheduled Refund or Edit Payee on Scheduled Stipend permissions. When you click **Edit Payee**, the Refund Payee/Addresses, Stipend Addresses, or Subsidiary Payee/Addresses form is displayed depending on the process you selected. You can select the payee and the associated address.

      When refund checks are printed, if the refund is due to a fund source other than the student, CampusNexus Student uses the lender description as the payee on the check. Previously, CampusNexus Student used the student's name as the payee.



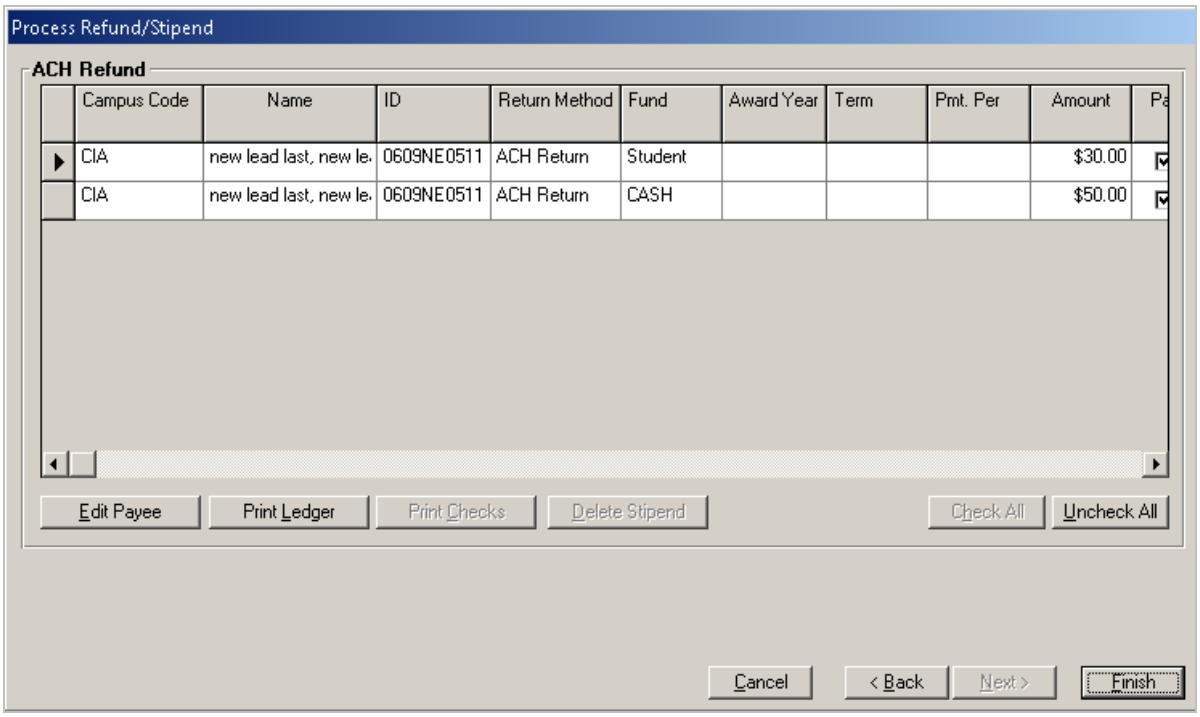
- The Delete Stipend button is enabled if you have Delete Scheduled Stipend permissions. Select a record and click **Delete Stipend**. Click **OK** to remove the scheduled stipend from the grid. The scheduled stipend record will still appear in the Student Stipend Schedule form.
- The Return Method fields can be modified if you have Edit Scheduled Refund or Edit Scheduled Stipend permissions.

14. Select the **Pay** check box to mark a transaction for payment. **Check All** selects all Pay check boxes for transactions which are eligible for payment. **Uncheck All** clears all Pay check boxes.

    If you select a fund source that has been deactivated, the Pay check box is cleared, you may not select the Pay field, you cannot process the refund, and a message in red indicates that the fund source has been deactivated.

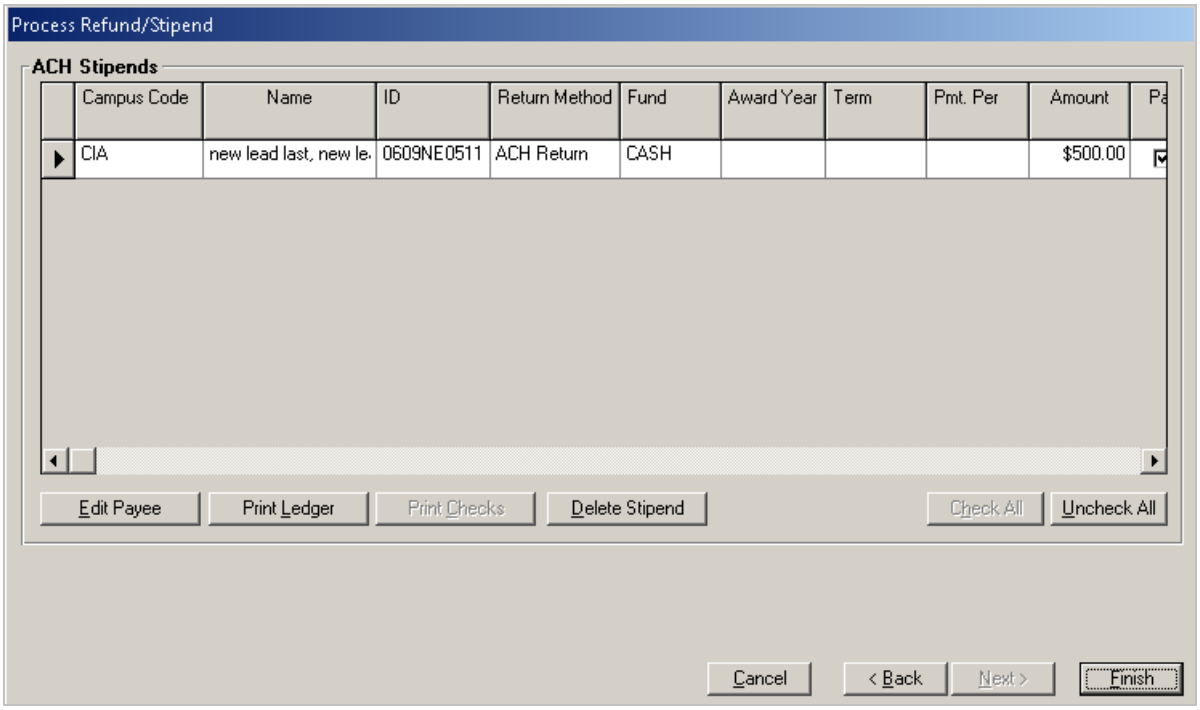
    The following images show Process Refund/Stipend forms for different return methods for refunds and stipends:

    ACH Refund

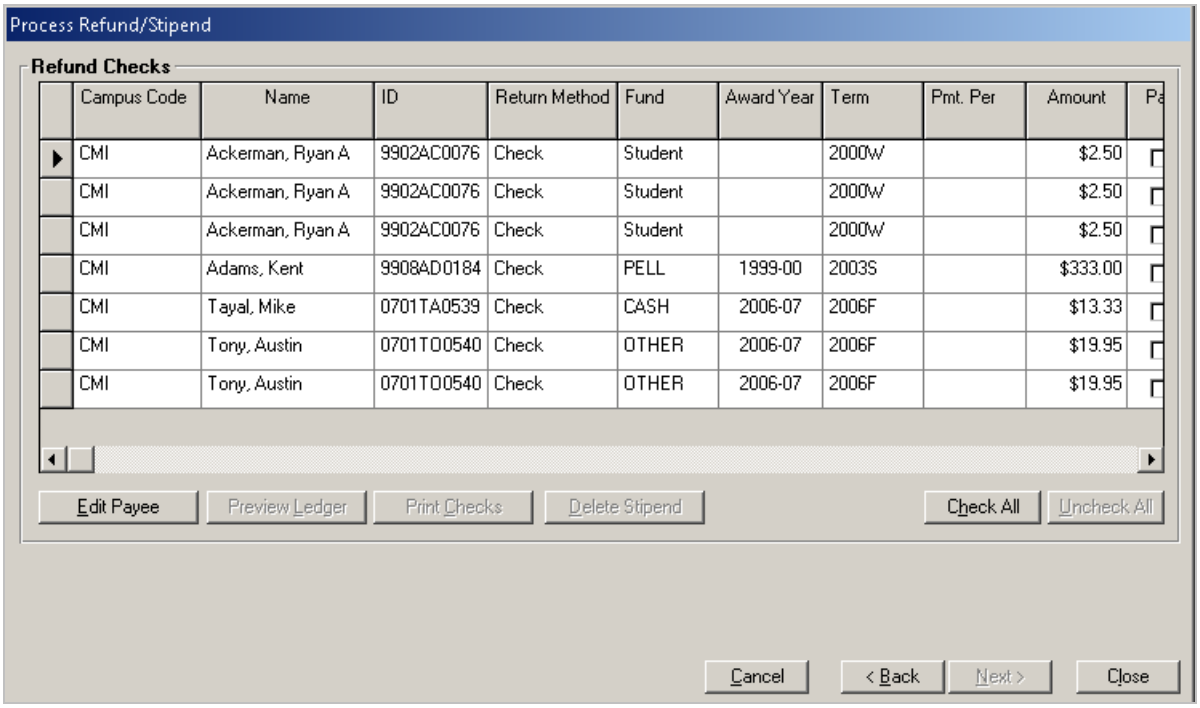


    The Delete Stipend and Print Checks buttons are disabled since they do not apply to refunds processed through ACH.

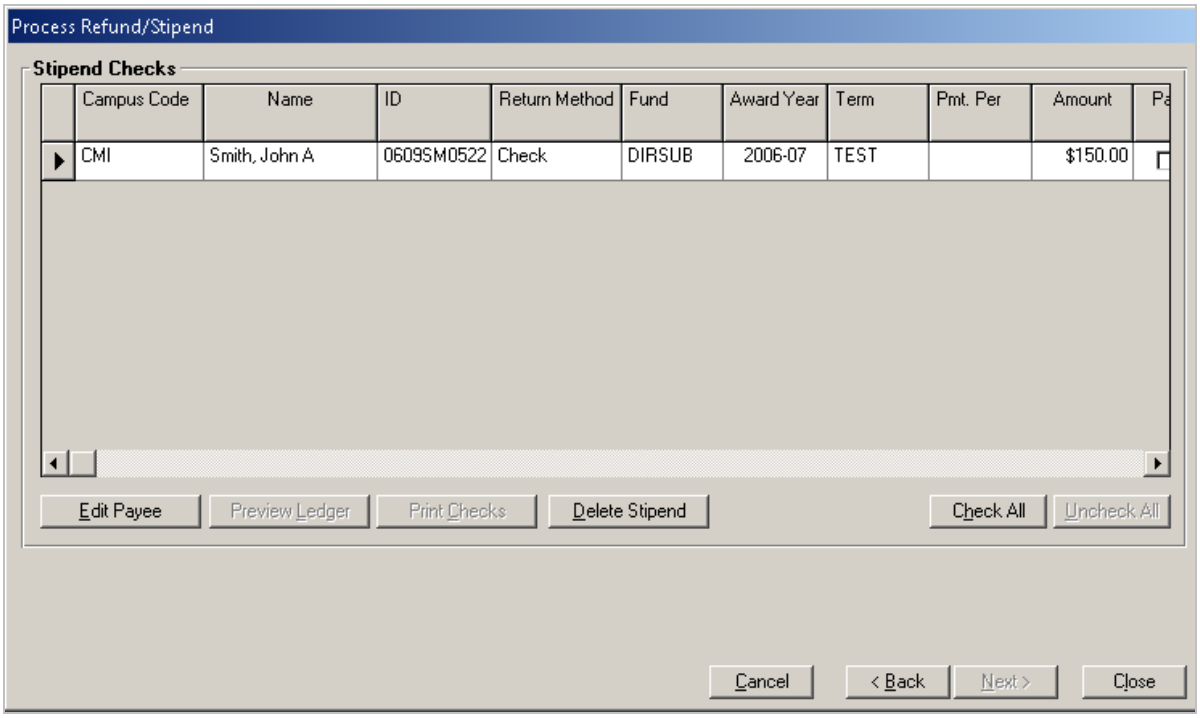
ACH Stipends



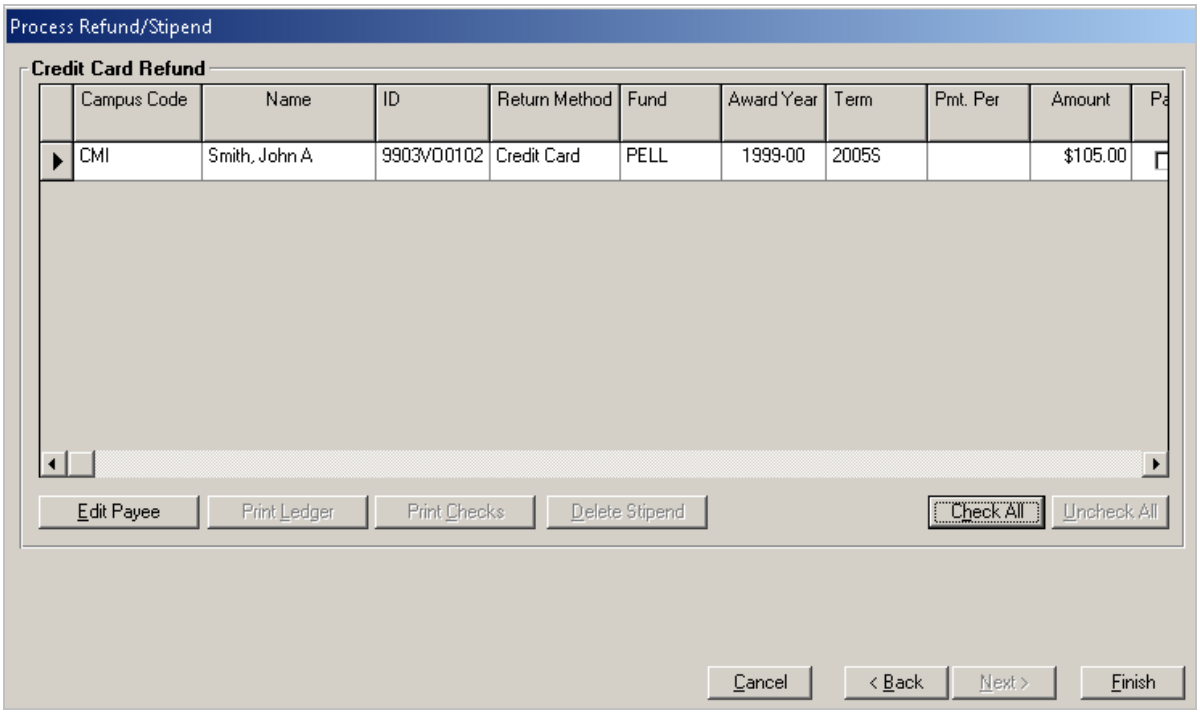
Refund Checks



Stipend Checks



Credit Card Refund



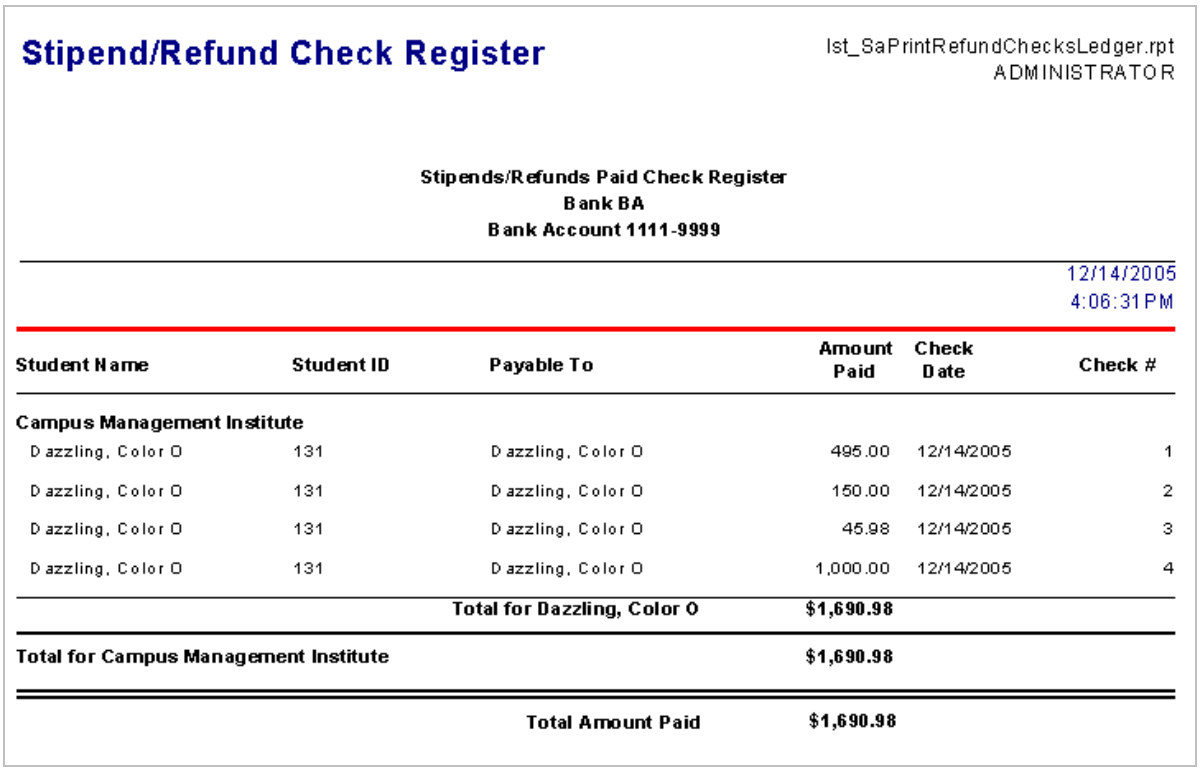
EFT or Net Stipends

Stipends selected for processing with EFT or Net return methods are picked up for processing as normal within the Process Refund/Stipend wizard. When the process is completed, the stipends are posted to the ledger card with

the corresponding return method on the transaction. Stipend processes with EFT or Net return methods do not include check printing or any functionality other than posting to the ledger card.

15. Click **Print Ledger** to view the Stipend/Refund Check Register report. The report shows details of all payments associated with a particular bank account.

    The following form is displayed for return methods other than ACH.



Stipend/Refund Check Register

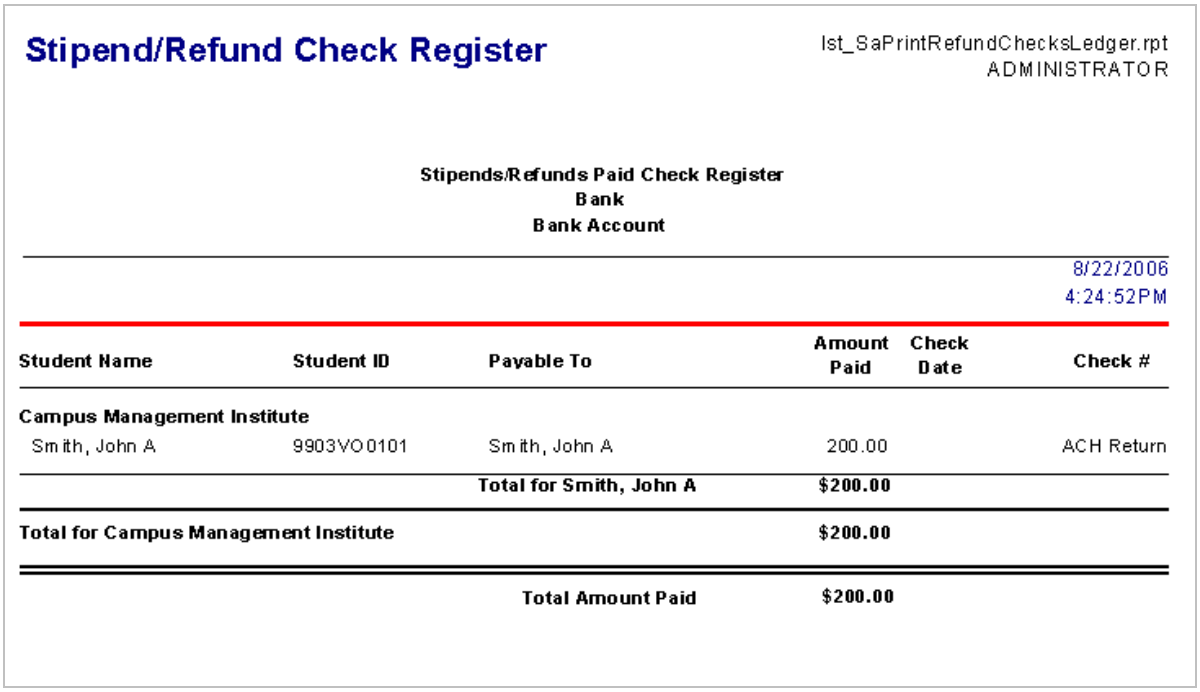
lst_SaPrintRefundChecksLedger.rpt
ADMINISTRATOR

Stipends/Refunds Paid Check Register
Bank BA
Bank Account 1111-9999

12/14/2005
4:06:31 PM

Student Name	Student ID	Payable To	Amount Paid	Check Date	Check #
Campus Management Institute					
Dazzling, Color O	131	Dazzling, Color O	495.00	12/14/2005	1
Dazzling, Color O	131	Dazzling, Color O	150.00	12/14/2005	2
Dazzling, Color O	131	Dazzling, Color O	45.98	12/14/2005	3
Dazzling, Color O	131	Dazzling, Color O	1,000.00	12/14/2005	4
		Total for Dazzling, Color O	**$1,690.98**		
Total for Campus Management Institute			**$1,690.98**		
		Total Amount Paid	**$1,690.98**		

    The following form is displayed for the ACH return method.



Stipend/Refund Check Register

lst_SaPrintRefundChecksLedger.rpt
ADMINISTRATOR

Stipends/Refunds Paid Check Register
Bank
Bank Account

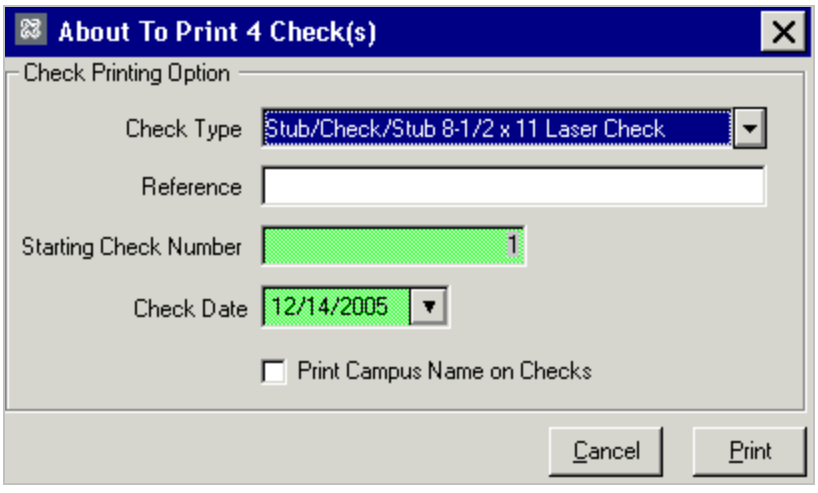
8/22/2006
4:24:52PM

Student Name	Student ID	Payable To	Amount Paid	Check Date	Check #
Campus Management Institute					
Smith, John A	9903VO0101	Smith, John A	200.00		ACH Return
		Total for Smith, John A	**$200.00**		
Total for Campus Management Institute			**$200.00**		
		Total Amount Paid	**$200.00**		

Note: The checks are printed on your default report printer. Load the checks in the printer before clicking Print Checks. Do not forget to remove the remaining checks from the printer before printing the register.

16. Click **Print Checks**. The About to Print <n> Check(s) form is displayed.

Note: This button is not available when processing ACH refunds or stipends.



Notice that the About to Print 4 Check(s) header indicates that four checks will be printed when you select the Print Campus Names on Checks check box. Verify that the number of checks indicated in the header is correct before proceeding.

a. Select the **Check Type**.

b. Enter a **Reference** number associated with the check.

c. Enter a **Starting Check Number**. For example, enter a '1' in this field to print check number 1, 2, 3, 4 when

four checks are about to be printed.

d. Select a **Check Date**.

e. Select the **Print Campus Name on Checks** to have the Campus Name appear on the check.

f. Click **Print** to continue or **Cancel** to discontinue processing.

17. Confirm whether the checks printed correctly.

18. Click **Post Checks**. CampusNexus Student posts the checks to the student's ledger cards and displays a confirmation message when the posting is complete. Click **OK** to acknowledge the message.

    Note: CampusNexus Student posts a stipend disbursement to the student's ledger card as a debit in the form of a negative payment. Given that financial aid has been received, or at least expected, in advance of the stipend disbursement, most likely there will be a credit balance in the student's account against which the disbursement will be applied.

19. For ACH processing, click **Finish**. A confirmation message is displayed when the refunds or stipends are scheduled and ready to be exported.

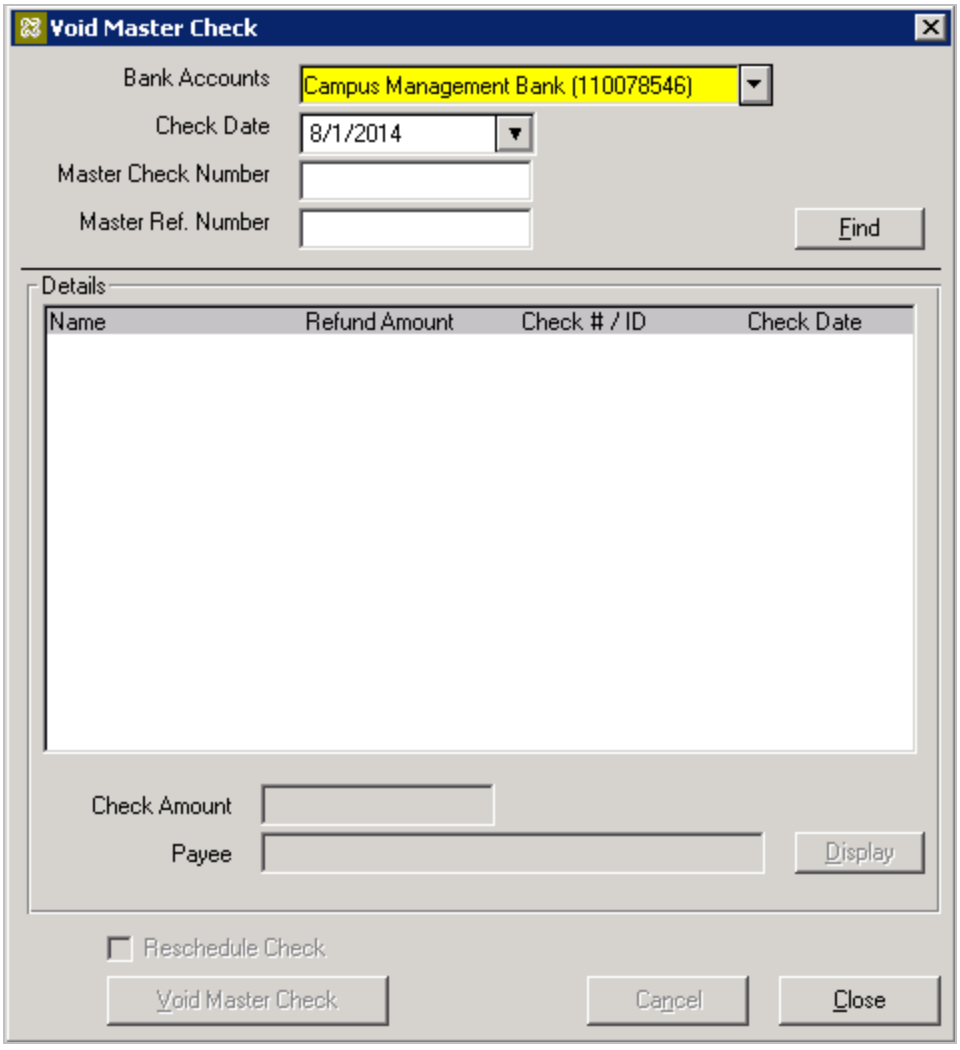
Void/Reschedule Master Checks

A staff member who has Void Paid Refund/Stipend and Schedule Refund/Stipend permissions can void or reschedule master checks for a fund source.

Note: When CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll, the Void/Reschedule Master Checks option is disabled.

To void or reschedule a master check:

1. Navigate to **Daily > Student Accounts > Void/Reschedule Master Checks**. The Void Master Check form is displayed.



2. Select the **Bank Account**.
3. Select the **Check Date**.
4. Click **Find**. CampusNexus Student displays paid refunds/stipends for the fund source for which you have Void Paid Refund/Stipend permissions.
5. Specify the **Master Check Number**. The form lists the students and refund/stipend amounts for each student.

6. Select **Reschedule Check** to reschedule the refunds/stipends associated with the master check.

   This option requires Schedule Refund/Stipend permissions for the fund source, .

7. Click **Void Master Check** to void the entire master check and cancel the refunds associated with the master check, or **Cancel** to discard the changes.

   This option requires Schedule Refund/Stipend permissions for the fund source.

Process Electronic Drafts

CampusNexus Student enables institutions to process credit cards and electronic drafts through an Automated Clearing House (ACH). Prerequisites for using this feature are:

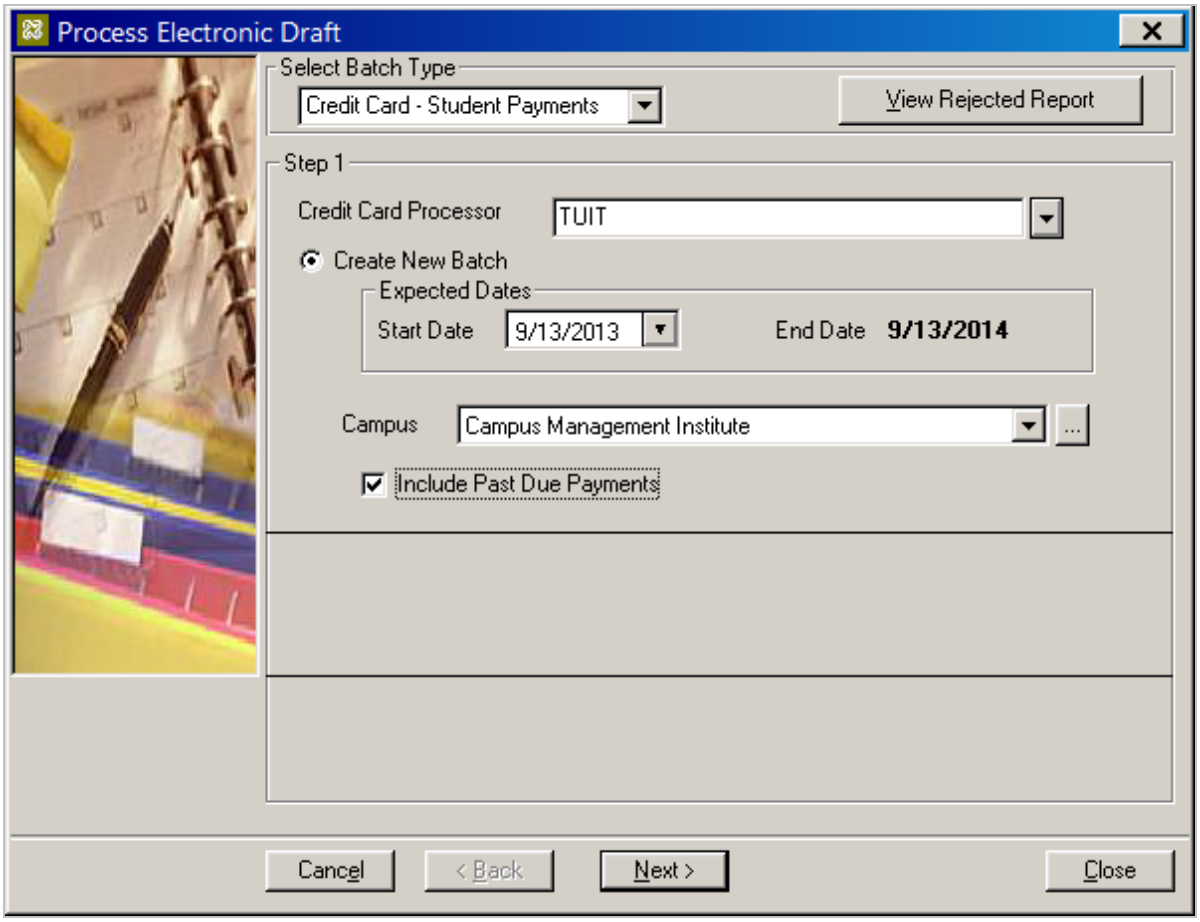
- The user must have appropriate permissions to process electronic drafts.
- The institution must have a relationship with a credit card processing company, such as VeriSign.
- The feature must be configured in the Credit Card Batch Setup.

To process (send) electronic drafts:

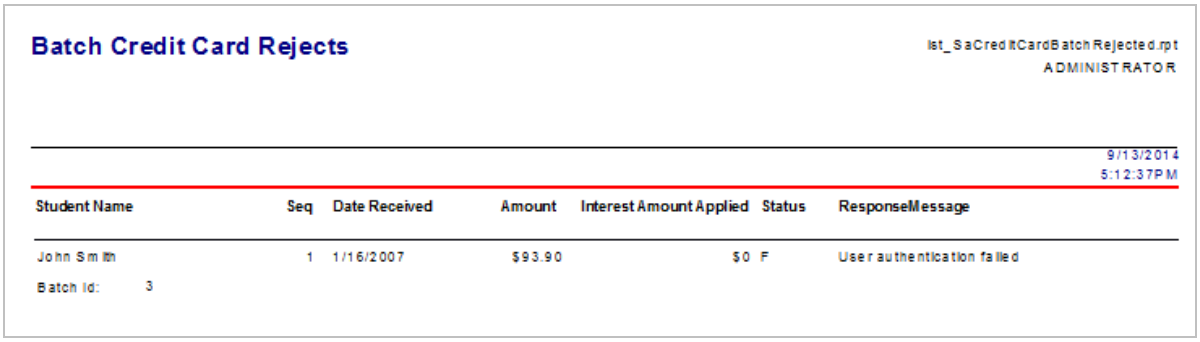
1. Navigate to **Daily > Student Accounts > Process Electronic Draft**. Step 1 of the Process Electronic Draft wizard is displayed.
2. Select a **Batch Type**. The options are:

   - Credit Card - Refunds
   - Credit Card - Student Payments
   - ACH Refunds
   - ACH Stipends
   - ACH Student Payments

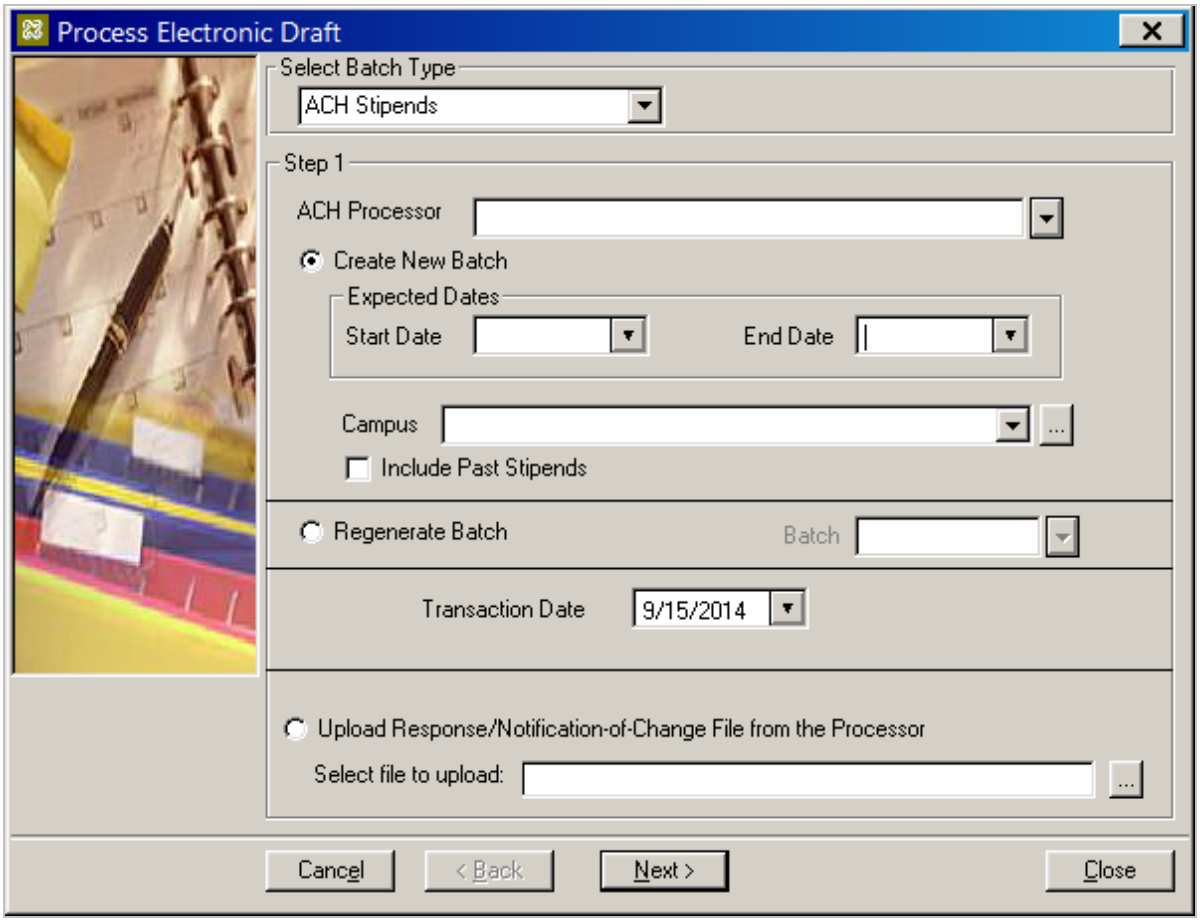
   For *Credit Card - Refunds* and *Credit Card - Student Payments* batch types, select a Credit Card Processor (see e Credit Card Batch Setup).



If the Batch Type you selected is not one of the ACH options, the **View Rejected Report** button is enabled. Click the button to view the report.



For ACH batch types, select an **ACH Processor**. The same ACH Processor can be set up to process payments, refunds, and stipends.



To receive electronic files:

a. Select **Upload Response/Notification-of-Change File from the Processor** to save to a local drive files sent to your institution by the processor. The *Select file to upload* field becomes available. See Response tab, Refund/Stipend tab, and Notif. of Change tab for additional information.

b. Click

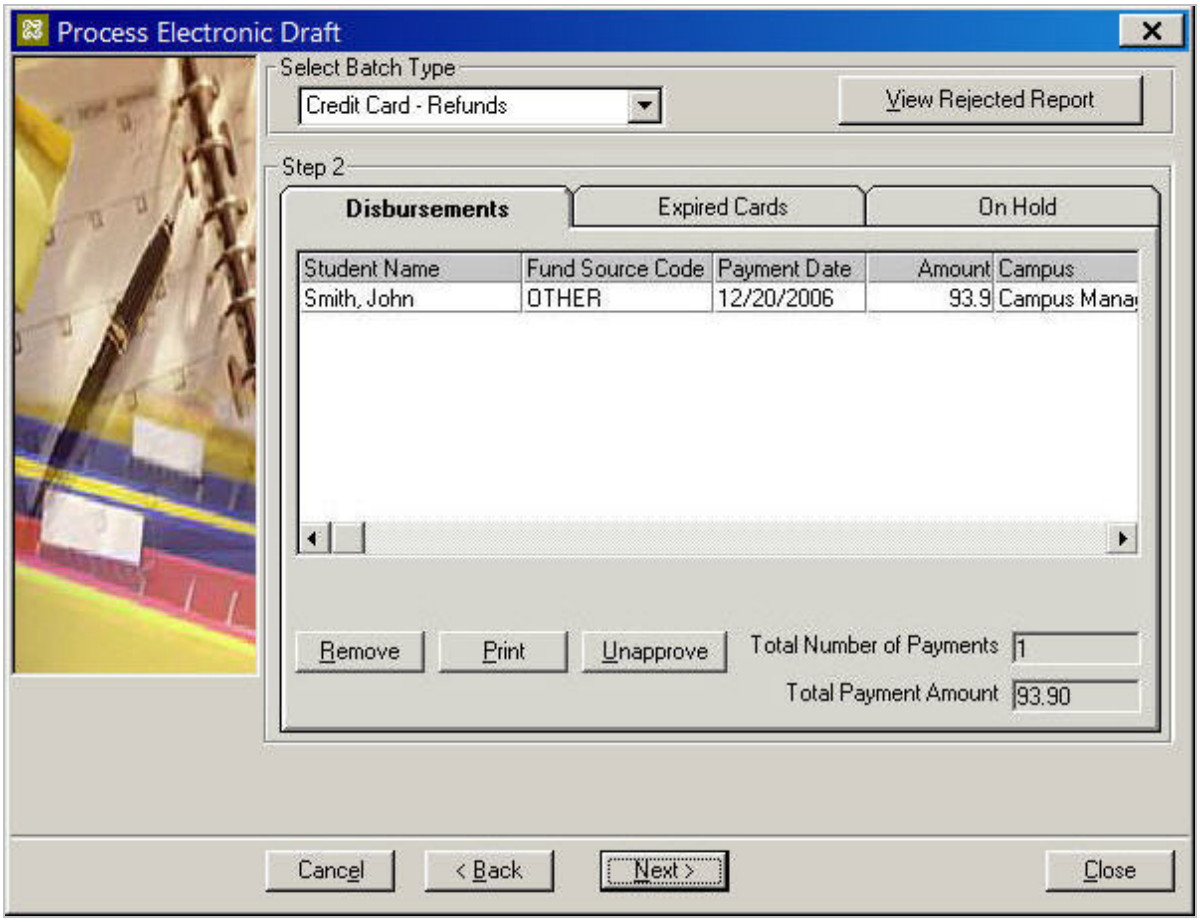
to select the location from which to upload files.

c. Click **Next** and follow the prompts to upload the file.

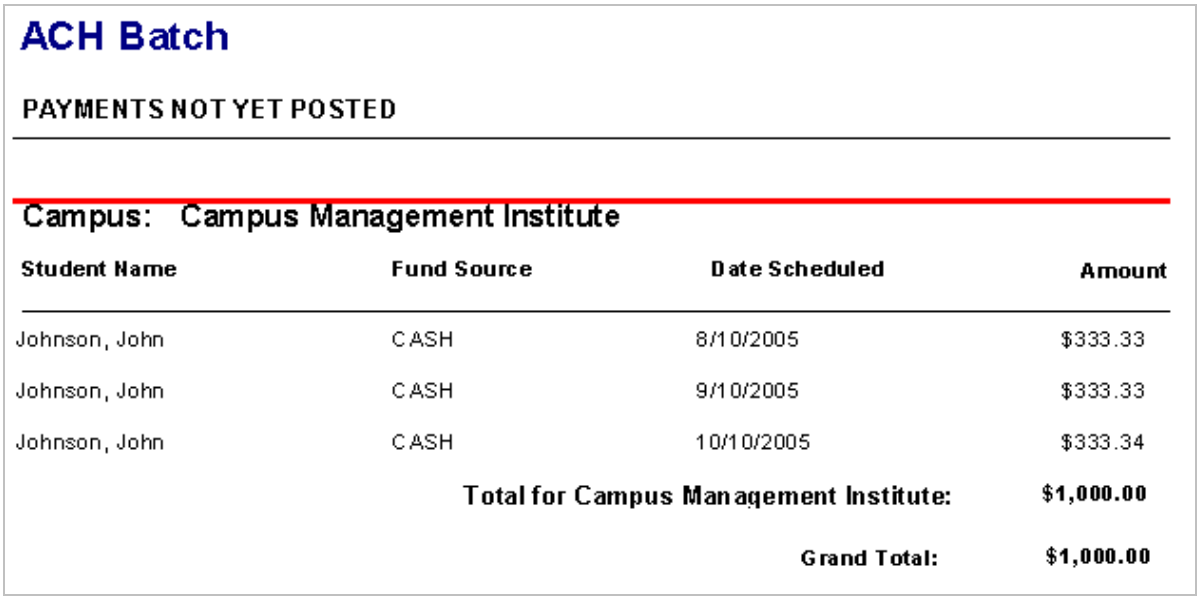
3. Select **Create New Batch**. The fields in the *Expected Dates* section are enabled.
4. Select a **Start Date**. Starting a new batch means that you are gathering all transactions that took place between the *Start Date* and *End Date* for the selected campus and are preparing to send the batch to the ACH for processing. CampusNexus Student populates the *End Date* with today's date.
5. Select a **Campus**. To select multiple campuses, click to the right of the Campus field. Select campuses you want to include in this batch.
6. Select **Include Past Payments/Refunds/Stipends** to include those in the batch.
   - If you selected a student payment options, the field is labeled *Include Past Due Payments*.
   - If you selected ACH Refunds, the field is labeled *Include Past Refunds*.
   - If you selected ACH Stipends, the field is labeled *Include Past Stipends*.
7. To view a batch of transactions previously sent, select **Regenerate Batch**. After a new batch is generated successfully, it appears in the *Batch* list.
8. Select the **Transaction Date**. CampusNexus Student populates this field with today's date. You can choose another date.
9. Click **Next**. Step 2 of the Process Electronic Draft wizard displays a summary of the transactions you are preparing to send, including the total number of payments/refunds/stipends in the batch and the total dollar amount of the payments, refunds, or stipends.

   CampusNexus Student generates an auto stipend, based on its configuration, when any ACH/Credit Card Student Payment is posted using the Process Electronic Drafts form. The trigger to perform the stipend calculation is based on any payment to the student ledger cards.

   - An auto stipend is created for ACH/Credit Card Student Payments only when both the tuition and posted payment are associated with same Payment Period or Term, or when both are not associated with any Payment Period or Term when the Credit Evaluation Time Frame is *Payment Period or Term*. CampusNexus Student first checks on the basis of Payment Period, and if none is found, it checks on the basis of Term.
   - An auto stipend is created for ACH/Credit Card Student Payments as per the auto stipend configuration when the auto stipend is turned ‘ON’ for the campus level.
   - A stipend is created only when the ACH/Credit Card Student Payments are associated with a payment source.
10. To delete the transaction from the batch, select a transaction and click **Remove**.



11. Click **Print** to generate the Batch report. This report is for an ACH Batch.



ACH Batch

PAYMENTS NOT YET POSTED

Campus: Campus Management Institute

Student Name	Fund Source	Date Scheduled	Amount
Johnson, John	CASH	8/10/2005	$333.33
Johnson, John	CASH	9/10/2005	$333.33
Johnson, John	CASH	10/10/2005	$333.34
		Total for Campus Management Institute:	**$1,000.00**
		Grand Total:	**$1,000.00**

12. To unapprove the transaction from the batch, select a transaction, and click **Unapprove**.
13. Click **Next**. Confirm that you want to generate a payment/refund/stipend or credit card transaction batch.

14. Click **Yes** to generate a batch file. A confirmation message indicates that the export file has been created.along with the batch ID number.

    Click **Ok**.

15. To prepare this batch for pickup by your ACH, click **Regenerate Batch**.

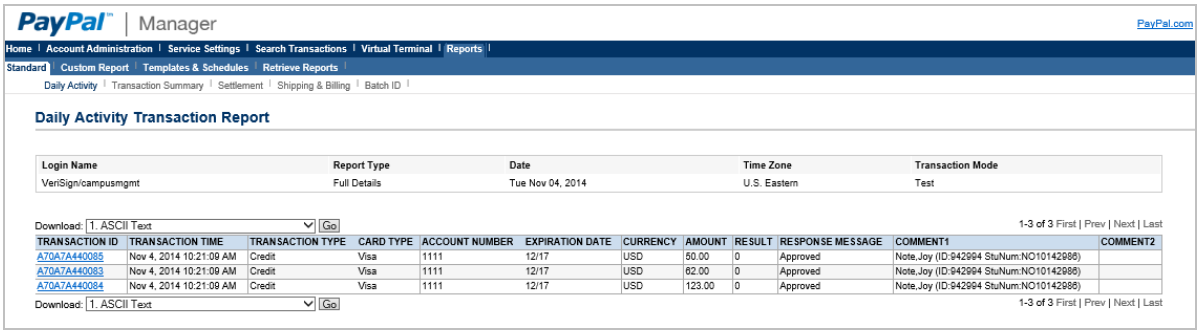
16. The file is sent to the dedicated folder that has been set up by the system administrator and CampusNexus Student for electronic pickup by the ACH for processing accessible via Setup > Student Accounts > Additional (tab) > ACH Setup (button).

17. If you selected *Credit Card - Student Payments* from the Batch Type field, selected a Credit Card Processor, and now want to generate a payment/refund/stipend or credit card transaction batch, confirm that you want to generate credit card transaction batches.

    Click **Yes** to generate the credit card transaction batches.

    A confirmation message is displayed identifying the type of transaction performed with the batch IDs.

As of CampusNexus Student 16.0, batch credit card payments and refunds sent to PayPal include the student name (last name, first name), student number, and student ID in addition to the amount paid. The student information appears in the COMMENT1 field when running the Daily Activity Transaction Report at PayPal Manager.



Process 1098-T (2007 and Prior)

Process your 2007 and previous tax year 1098-T by following the directions in this topic.

Year 2008 and later tax years use the CampusNexus Student 1098-T Processing Utility, which has its own Help system. For detailed information, instructions, and actions to be taken to implement this utility, please contact your Anthology Inc. Account Manager at 561-923-2500, or by email at AM@campusmgmt.com; or, go to our Customer Support Resource Center (CSRC).

2007 and Prior Award Year Processing

The Internal Revenue Service (IRS) requires institutions to file 1098-Ts for each student who meets certain requirements for the Hope credit or qualifies for the lifetime learning credit. From student records, CampusNexus Student determines which students need to be reported on 1098-Ts. The institution must print 1098-Ts to send to the qualified students. The institution can also create an electronic file with 1098-T data to transmit to IRS via the export feature. See also:

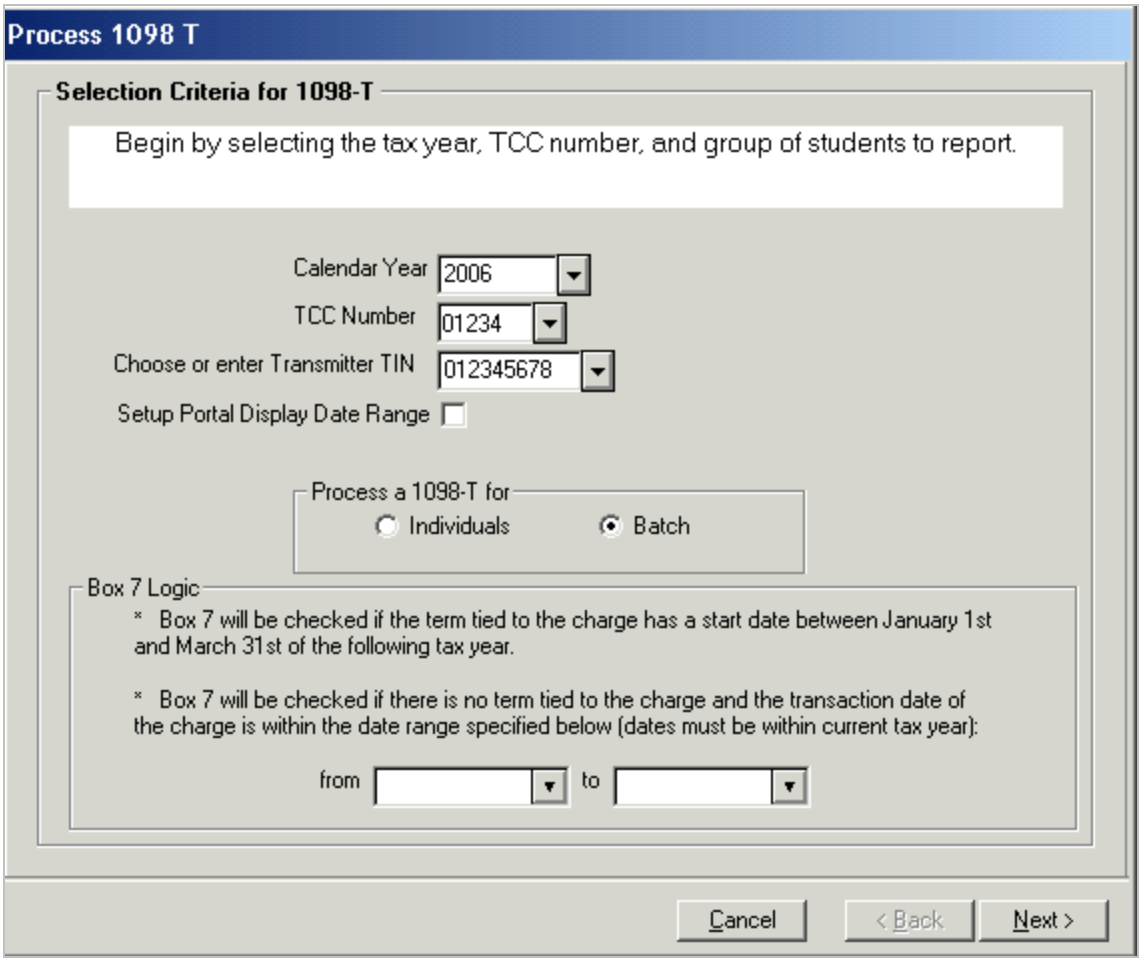
- 1098-T Setup
- Print 1098-Ts
- Export 1098-Ts
- 1098-T Reporting Methods
- 1098-T Summary Report (Select and appropriate option in the **Reports** menu.)
- Citizenship
- Grade Level
- Fund Sources
- Transaction Codes
- Ledger Cards
- IRS Website https://www.irs.gov/instructions/i1098et#d0e238

If your institution uses a third party servicer for processing and mailing 1098-Ts, you do not need to print 1098-T forms. Simply create the export file to send to the servicer.

Before you can print your 1098-Ts, you must obtain the necessary forms. The forms are for a laser printer. Thee forms are required for each student; one for Copy A (IRS), one for Copy B (Student), and one for Copy C (institution/filer).

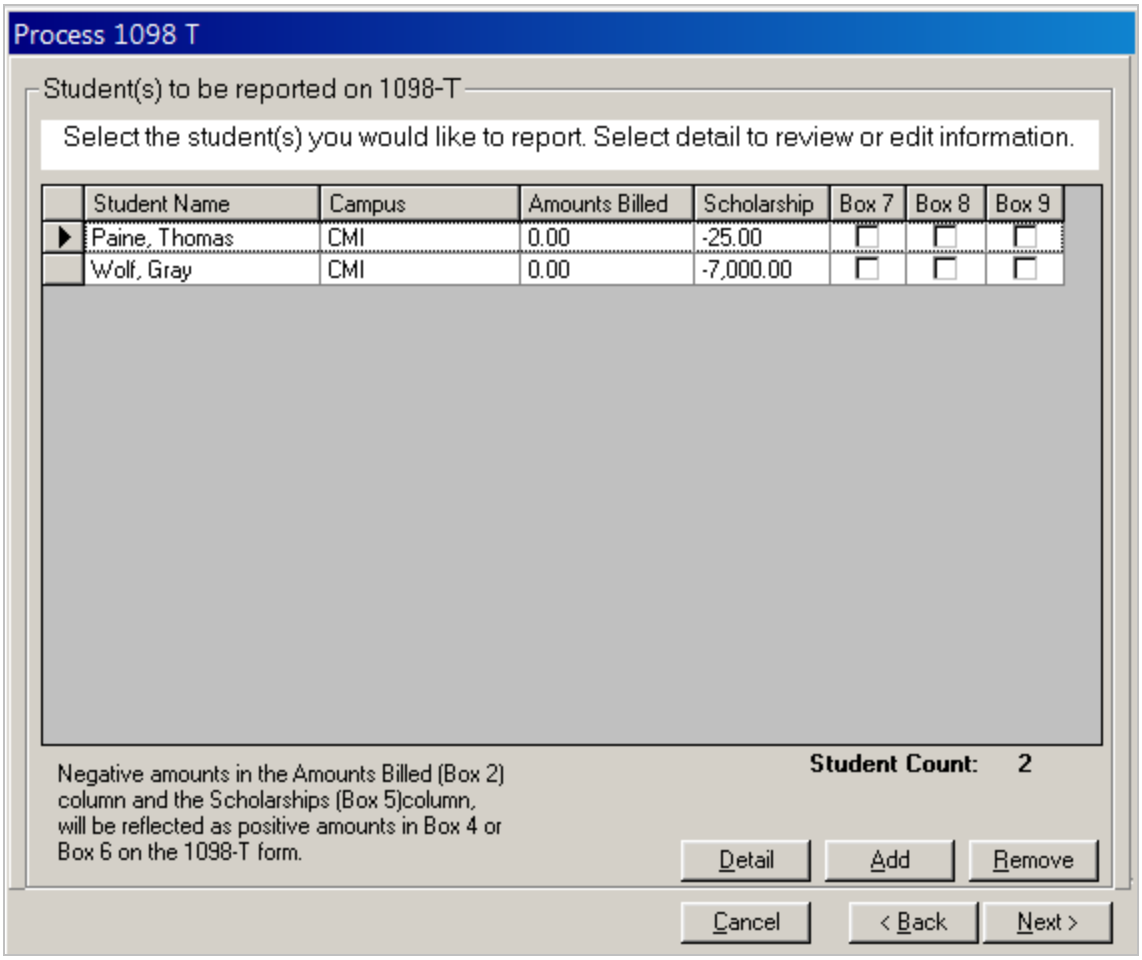
To process 1098-Ts for selected students:

1. Select **Daily** > **Student Accounts** > **Process 1098-Ts**. The Process 1098-T wizard is displayed.



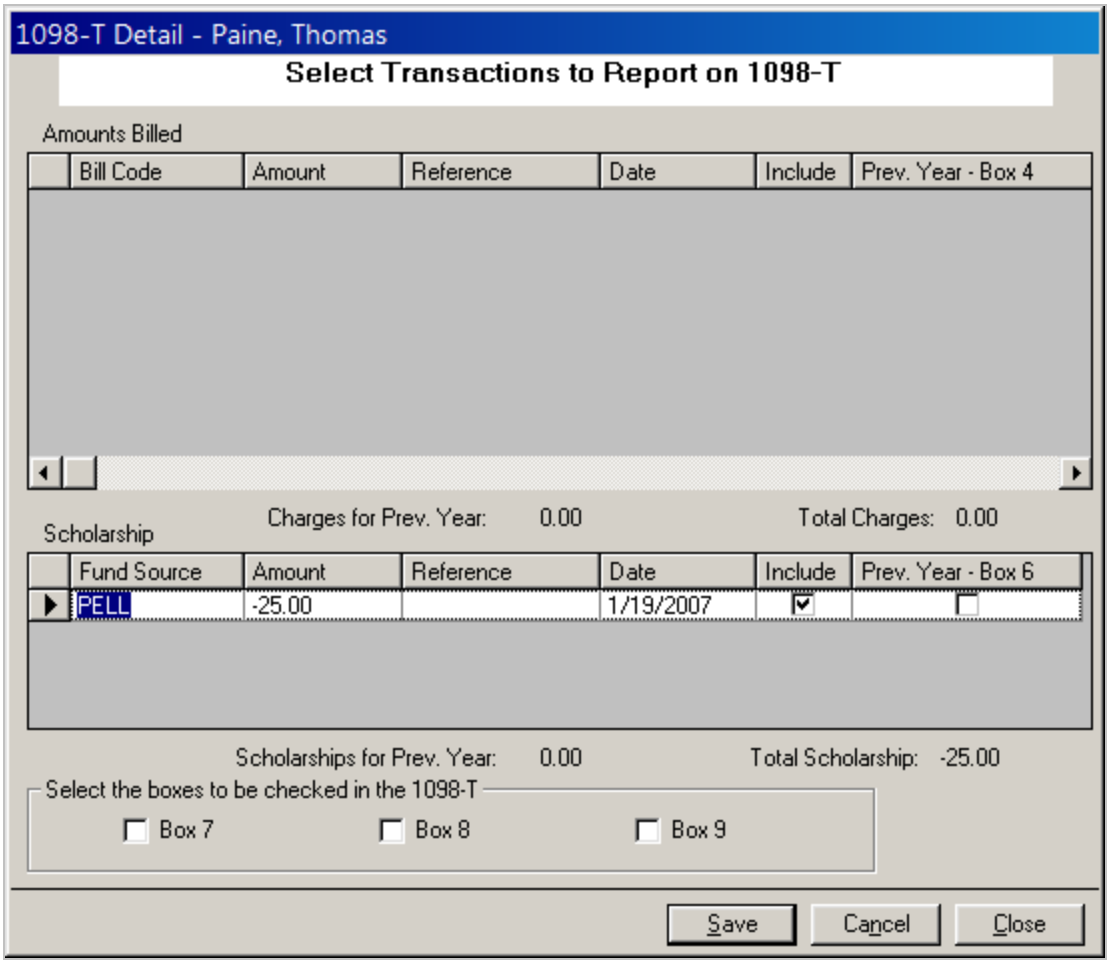
2. Select the **Calendar Year** for which the forms are to be printed.
3. Enter (or select) the **TCC Number** (Transmitter Control Code).
4. Enter (or select) the TIN (Transmitter ID number) in the **Choose or enter Transmitter TIN** field.
5. Select the **Setup Portal Display Date Range** check box if you want students to be able to view their 1098-Ts via Portal.

   When select the check box, two date fields appear. Select the beginning and ending online publish dates. If the dates represent the year following (or later) the student's tax year, they are stored upon completing the Process 1098-T process and retrieved by CampusNexus Student when determining whether to display the 1098-T page to the student through Portal.
6. Choose **Individuals** or **Batch**. If you select the **Individuals** option, and click **Next**, the student Search form is displayed where you can select specific students by name or filtering criteria.
7. To use the Billing Address on the 1098-T, select to include transactions for the current Year (through March), or select a date range.
8. Click **Next**. The students to be reported are listed.



9. Select any student and click **Detail** to view the transactions being reported for the selected student.

   Note: The blue text "Reporting Method Changed" appears if the campus has changed the 1098-T Reporting Method.



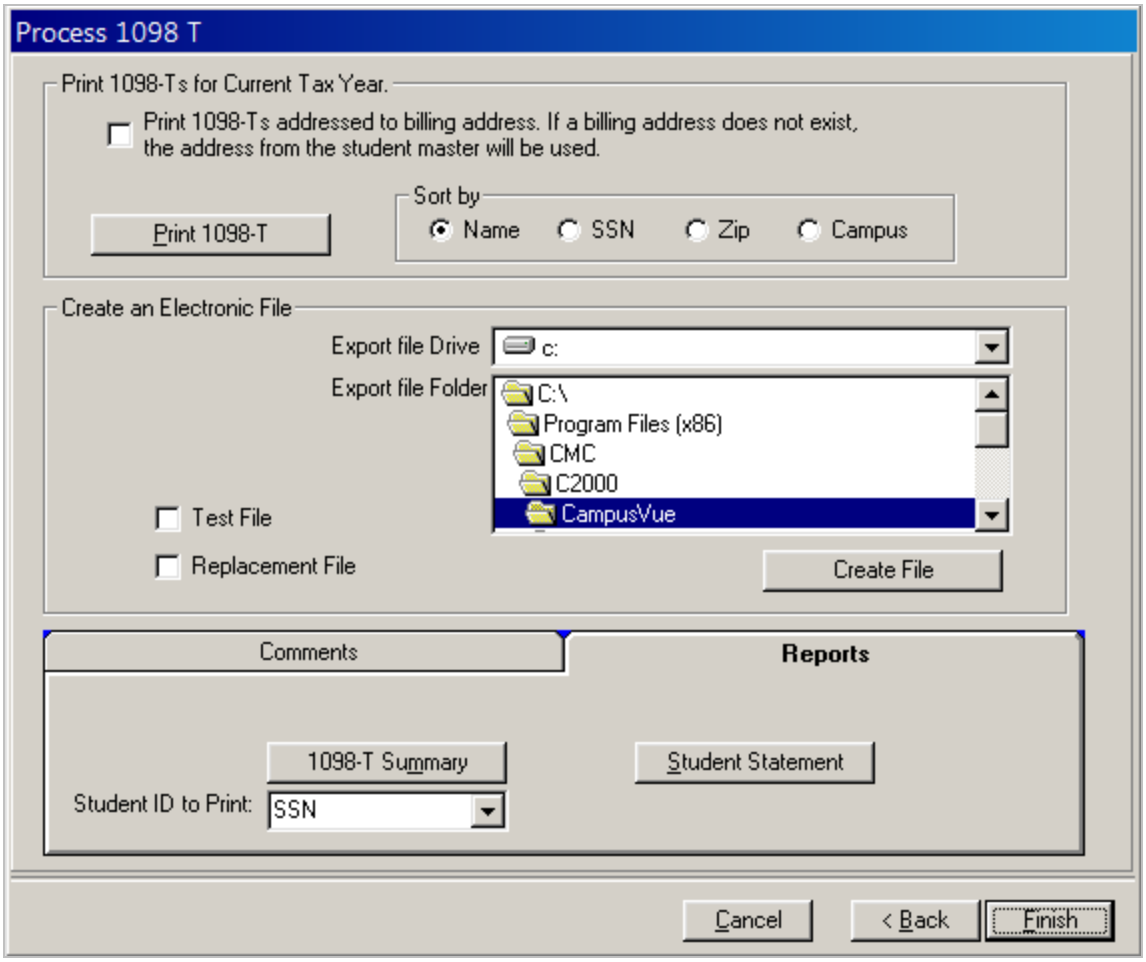
a. To include the transaction in the 1098-T, select the **Include** check box next to the transaction.

b. In the Amounts Billed grid section, you have the option of selected the Previous Year Box 4 (Box 4 on the 1098-T form). Select the check box only if the amount is a negative adjustment or a negative charge and the **Include** column is selected.

c. In the Scholarship grid section, select the Previous Year- Box 6 column (Box 6 on the 1098-T form) only if the amount is negative and the **Include** column is selected.

d. Click **Close** to close the form. You are returned to the Process 1098-T wizard.

10. Click **Next** to proceed. The print options form is displayed.



11. Use this form to print the 1098-Ts for the current tax year or create an electronic file for online processing.

    Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

1098-T Reporting Methods

The 1098-T reporting methods are 'Amounts Billed' and 'Amounts Paid'. Institutions that previously used the 'Amounts Paid' method but wish to use CampusNexus Student for the current year of 1098-T processing, must get permission from the IRS to change their reporting method to 'Amount Billed'. Once this is accomplished, CampusNexus Student may be configured to use this new feature to indicate that the reporting method has changed. If this is the case, CampusNexus Student places a check mark in Box 3 of the processed 1098-T forms.

Print 1098-Ts

To print 1098-Ts:

1. Run the Process 1098-T wizard as described above and select appropriate options. If the billing address is to be used to address the 1098-T forms, enable the **Print 1098-Ts addressed to billing address** check box. If this option is enabled and a billing address does not exist for a student, the address from the Student Master is used.
2. Select a sort option for the forms:

- Name
- Social Security Number
- ZIP Code
- Campus

3. Click **Print 1098-T**. The following message is displayed: *Print the 1098-T's Three (3) Times (For Copy A, B, and C).*

   Because three different forms have to be printed for each student (Copy A, Copy B, and Copy C), first load the printer with the forms for Copy A, print the report, then repeat this process for Copy B, and again for Copy C.

4. If 1098-Ts do not need to be run for the students you selected, CampusNexus Student indicates such.
5. Click **OK**. Run the report and display the preview.
6. Load the Copy A forms in the report printer and click to run the report. Copy A is for the Internal Revenue Service (IRS).
7. Load the Copy B forms in the report printer and click to run the report again. Copy B is for the student.
8. Load the Copy C forms in the report printer and click to run the report for the last time. Copy C is for the institution (filer).
9. Close the Report Preview window and close the form.

Note: When the 1098-T forms are printed, a message asks if they printed properly. If they did not, click **No** and CampusNexus Student will allow you to reprint the forms again, or just reprint a portion of the forms based on the sort order chosen in the wizard.

Export 1098-Ts

A Contact Name and Telephone are required in the 1098-T export record. The contact is assumed to be the person who is executing the export procedure. Not all fields are in the Staff table. CampusNexus Student uses the institution's campus information if the Staff information for the following fields are blank.

Field Positions and Titles

Field Pos	Field Title
304-343	Contact Name
344-358	Contact Phone (number and extension)

If the contact phone number is blank, CampusNexus Student uses the campus phone.

Vendor information is also required. CampusNexus Student populates the vendor information fields with Anthology Inc.'s name and address.

Field Positions and Titles

Field Pos	Field Title
519-558	Vendor Name
559-598	Vendor Mailing Address
599-638	Vendor City

Field Pos	Field Title
639-640	Vendor State
641-649	Vendor ZIP Code
650-689	Vendor Contact Name
690-704	Vendor Contact Phone (number and extension)
705-739	Vendor Contact Email Address

Hyphens, blanks, or alphabetic characters are not valid for the TIN field in the "A" records.

Field Positions and Titles

Field Pos	Field Title
12-20	TIN

To export 1098-Ts:

1. Run the Process 1098-T wizard as described above until the **Create File** option is available.
2. The default drive and folder path for exporting files is the path assigned in Setup > System > General tab > Enter EDE Path. At the time you export, you can select a different drive and path using the browse options on the form.
3. The default setting sends a file to the path selected. Select **Test File** to create a file for test purposes.
   - OR -
   Select **Replacement File** to replace an existing file that has not yet been transmitted.
4. When the options are set, click **Create File**.

A data file is created in the folder that you designated in step 2. CampusNexus Student names the data file automatically and displays a message to notify you of the file name when it is completed. This data file is the export record that can be sent to the IRS, or to a servicer if your institution uses one for this purpose.

Revenue Recognition

Note: If CampusNexus Student is integrated with an accounting system, refer to Release to Integrated Accounting System.

Revenue recognition is an accounting process in which tuition and other revenue is transferred from deferred income accounts to earned income accounts on a regular basis. This is necessary to match the income earned with the services provided to the student by the institution.

Note: Refer to the Staff Accounting Bulletin No. 101 (SAB101) document from the SEC for more information on revenue recognition. One of the main changes is that institutions must report up-front fees (like registration fees) over the life of the program.

The earnings method(s) to be used for your institution must be set up. Earnings methods are based on earning units: Months, Weeks, Calendar Days, Scheduled Hours, Attended Hours, Courses/Credits, and Course Meeting Days. A special case is set up if your institution bills by academic year. Refer to Examples of Revenue Recognition with Earnings Based on Academic Years.

If your institution uses Term Relationships, you can earn by Child Term. Refer to Example of Billed by Parent Term and Earned by Child Term .

Also set up your Billing Methods to work in conjunction with your earnings method(s). The billing method determines how your revenue is recognized. If your Revenue Basis (Earning Unit) is **months**, the following applies.

- If you bill by Term, the Total Earning Units is the time frame in the Term.
- If you bill by Program, the Total Earning Units is the time frame in the Program.
- If you bill by Payment Period, the Total Earning Units is the time frame in the Payment Period.
- If you bill by Credit Hours, the Total Earning Units is the time frame in the Term.
- If you bill by Academic Year, the Total Earning Units is the time frame in the Academic Year.

The reference number to be used for the revenue recognition transaction batch is set up. CampusNexus Student increments this number for each new batch.

As transaction codes are set up, codes such as TUIT (tuition) are marked as deferred revenue transactions. These are the transactions that the Revenue Recognition wizard looks for during the month-end process. General Ledger Account Numbers are associated with all transaction codes.

The revenue recognition routine defers revenue by campus. When a student has deferred revenue for more than one campus, the revenue recognition procedure earns each deferred balance separately.

Revenue recognition can only be run at the end of the month. When it is run, entries are made in the student's revenue ledgers. To view the revenue ledger of a student, select a student and access the student's Revenue Ledger form. You can adjust a student's revenue ledger. This might be necessary after an initial data conversion.

Revenue Recognition Options

Revenue Recognition allows for setting parameters on how to earn on the First and Last months of the Earnings Period. This only applies to earnings methods that use **Months as the Earning Unit**. These parameters determine if a student earns a Full Month, Half Month, or Nothing at all in the First and Last months of the Earnings Period.

The Revenue Recognition/Earnings Method setup and calculation allows for earning ½ month of revenue on the First and/or Last month of Enrollment. You can configure the Earnings Policy to earn ½ month in the first and last months using two separate and unrelated days. (Example: An institution may want to earn a full month on the first month of enrollment regardless of the day of the month that the student starts, and earn a full month on the last month of enrollment only if the student ends after the 15th of the month. You can configure the first month as "On or before the 31st of the month" and the last month as "On or after the 15th of the month").

You can calculate negative deferred revenue in the month in which it was posted or amortized through the revenue Earnings Period. Set this option for each bill code from the Transaction Codes Setup form.

Revenue Calculation Details

Various formulas are programmed into the earnings calculation function to properly calculate revenue based on these additional earnings units. The earnings scope is determined from the Billing Method Frequency. Each program version has a billing method selected. The frequency field contains one of the following values:

- **P** = Full Program
- **A** = Academic Year
- **T** = Term/Quarter
- **C** = Course (Frequency to use for earnings is Term/Quarter).
- **E** = Payment Period
- **X** = Course Section

Earnings Period Start Dates

The Earnings Period Start Dates are as follows:

- If P (Full Program), the Earnings Period Start Date is the Actual Start Date for the Enrollment.
- If A (Academic Year), the Earnings Period Start Date is the Start Date for the Academic Year.
- If T (Term), the Earnings Period Start Date is the Start Date for the Term.
- If C (Course), the Earnings Period Start Date is the Start Date for the Term where the course is scheduled.
- If E (Payment Period), the Earnings Period Start Date is the Start Date for the Payment Period.
- If X (Course Section), the Earnings Period Start Date is the Start Date of the Course Section.

The revenue calculation is always cumulative for the Earnings Period. This means that when calculating earned revenue, the calculation determines the total amount that should be earned to date. Then the calculation subtracts the total amount earned before this revenue recognition period. The result is the amount earned for this revenue recognition period.

The Revenue Recognition procedure always writes an earnings record for any Revenue Ledger that has a balance. If there is an exception, if for any reason the student is not to earn, the calculation writes an earning record (SaRevenueDetail - type 'E') with a zero amount. This is necessary, so that if the user cancels the revenue process, CampusNexus Student can reset the last earn date.

Earn on "Incompletes"

Some institutions have an "INC" SySchoolStatus Code that is assigned to the LOA system status code. Revenue Recognition earns on the "LOA" status code if the school status code is "INC". All other school status codes that are assigned to the "LOA" system status code do not earn revenue.

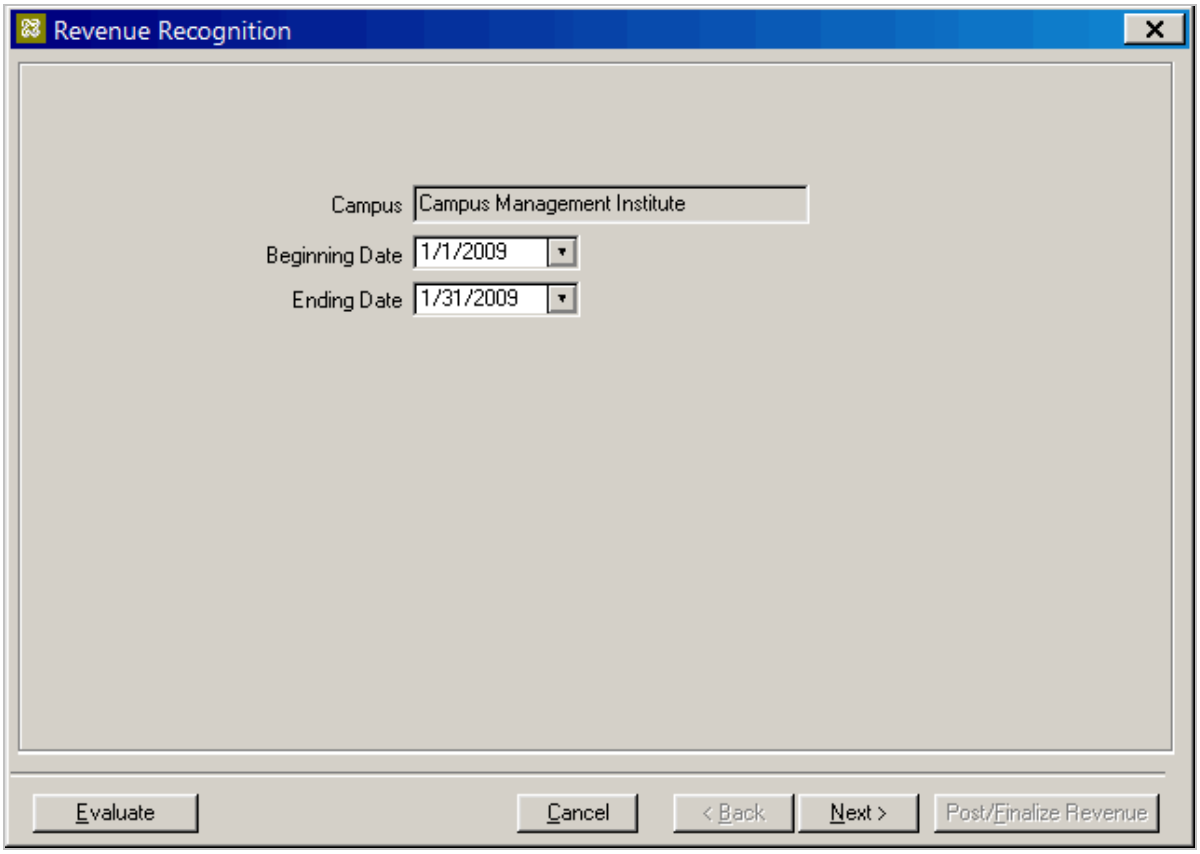
Revenue Recognition Exception Report

You can report on students that earned no revenue during a month, but had an unearned ending amount greater than zero from the previous month in addition to the following categories: Invalid Term ID, Term Has Not Started, Never Attended, LOA, Hasn't Attended Recently (setting), Required Attendance Percentage, and Hasn't Attended Minimum Hours Required. Any student not identified with an existing exception reason, is assigned to a new revenue exception of **Other exception**. This provides an audit report that is used to determine any students who should be earning revenue.

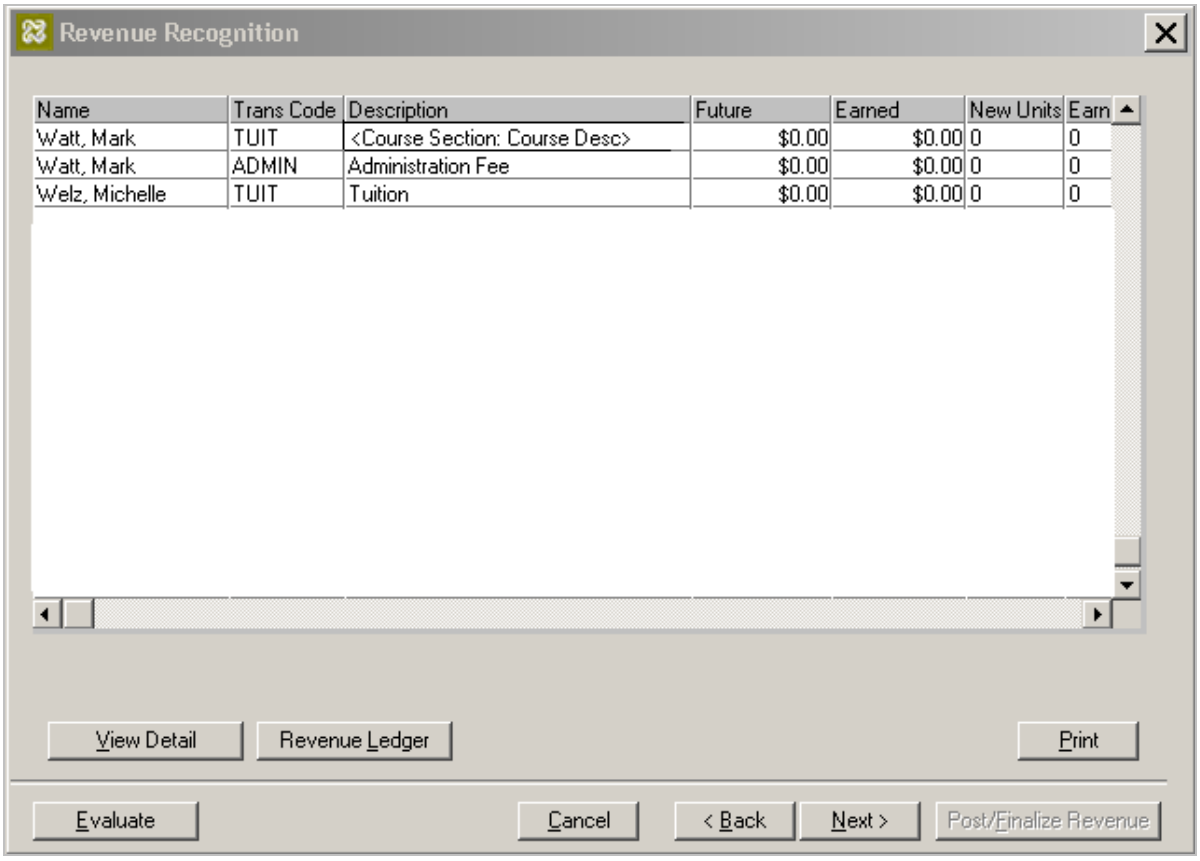
Revenue Recognition Wizard

To run the Revenue Recognition Wizard:

1. Set your default campus to be the one for which revenue recognition is to be processed.
2. Navigate to **Daily** > **Student Accounts** > **Revenue Recognition**. The Revenue Recognition wizard is displayed. The default campus is displayed on the first screen and disabled.



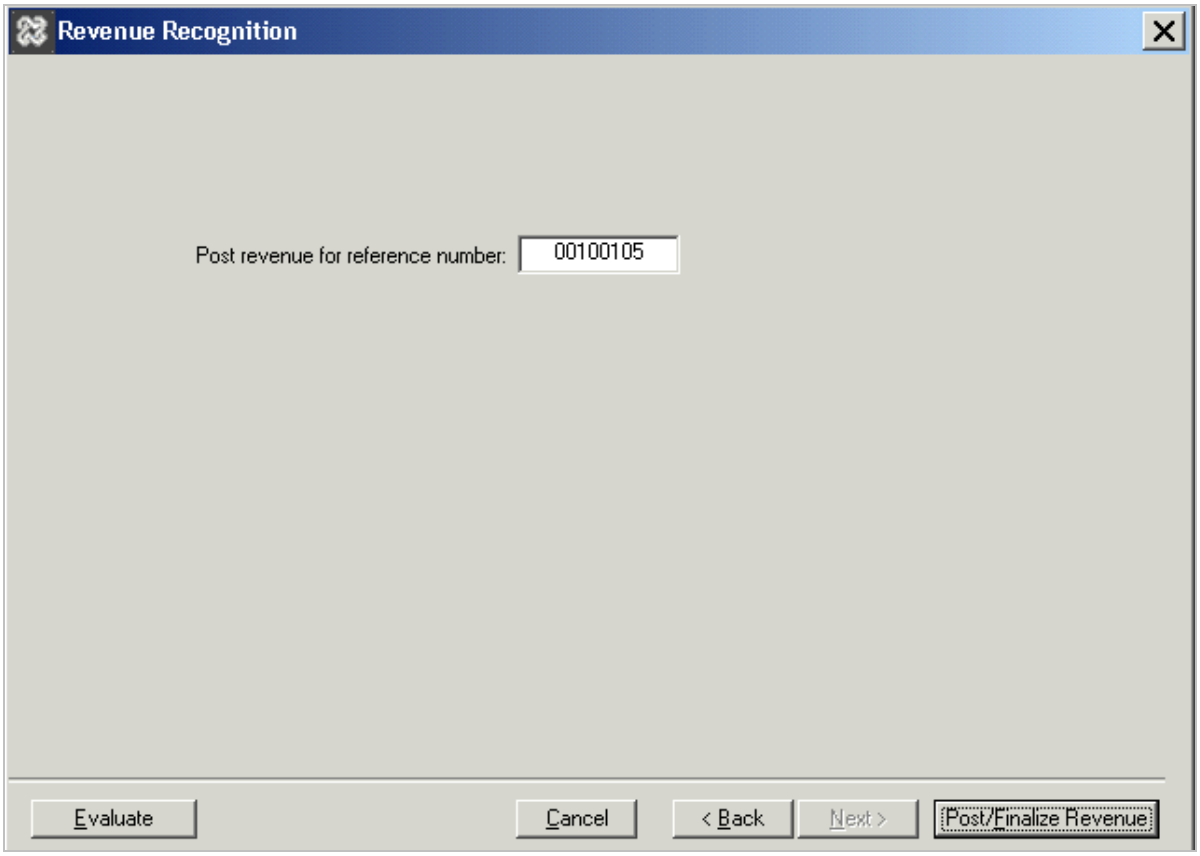
3. CampusNexus Student displays the appropriate **Beginning Date** and **Ending Date** through which the revenue recognition is to be run. You can change the date to an earlier month-end date if necessary by going to **Setup** > **Campus Locations** > **Accounting** tab. You would only do this during conversion and start-up activities; otherwise, you could "double up" your earnings records by going back to an earlier date.
4. Click **Next** to gather the revenue records to process, or Evaluate to see if there are any records with issues.
5. If you clicked Next, a message indicates if there are exception records. Click **Yes** to view the exception report, or **No** to continue.
6. If you selected **No**, the revenue records that can be processed are displayed.



Note: The Description column displays the Course Section: Description.

- When the student meets the criteria for recognizing revenue over the life of a course rather than the life of a term or any other revenue Earnings Period, and the TUIT charge is posted, the **Course Section: Description** is displayed.
- When the student does not meet the criteria for recognizing revenue over the life of a course and TUIT charges are posted, the description found on the SaBillCode record (e.g., Tuition) is displayed.
- When a bill code transaction is not setup to earn over the life of a course, the description found on the SaBillCode record (e.g., Administration Fee) is displayed.

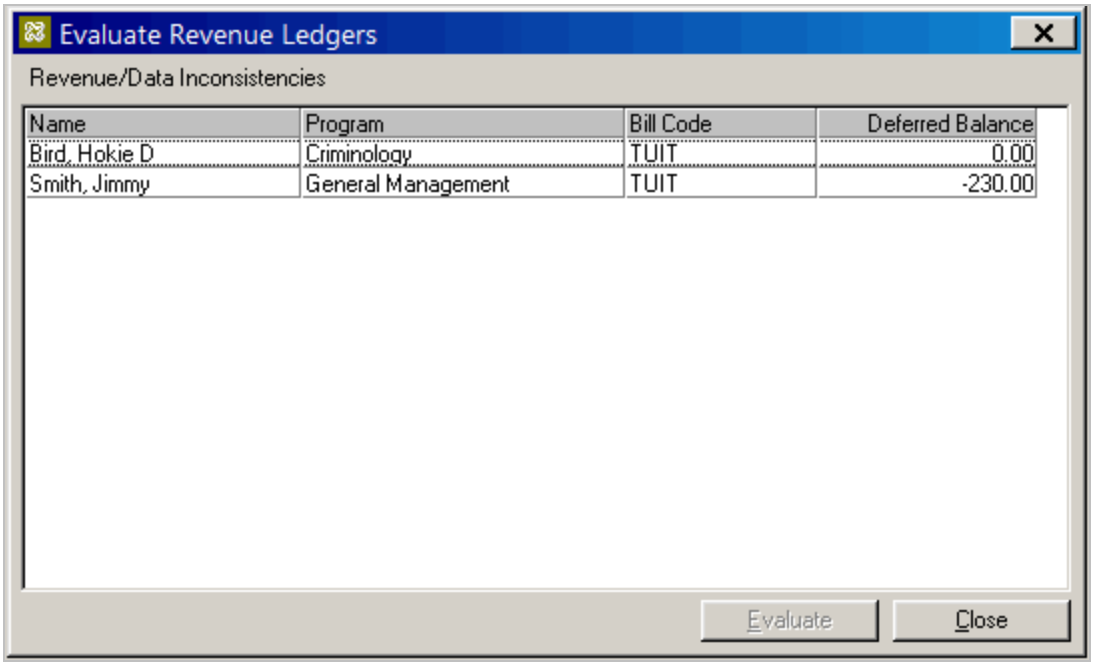
7. Select **Next** to proceed. Click **Evaluate** to resolved issues, **Back** to return to the previous screen, or **Cancel** to cancel the revenue recognition process.
8. CampusNexus Student assigns a reference number. Select **Post/Finalize Revenue** to post the revenue.



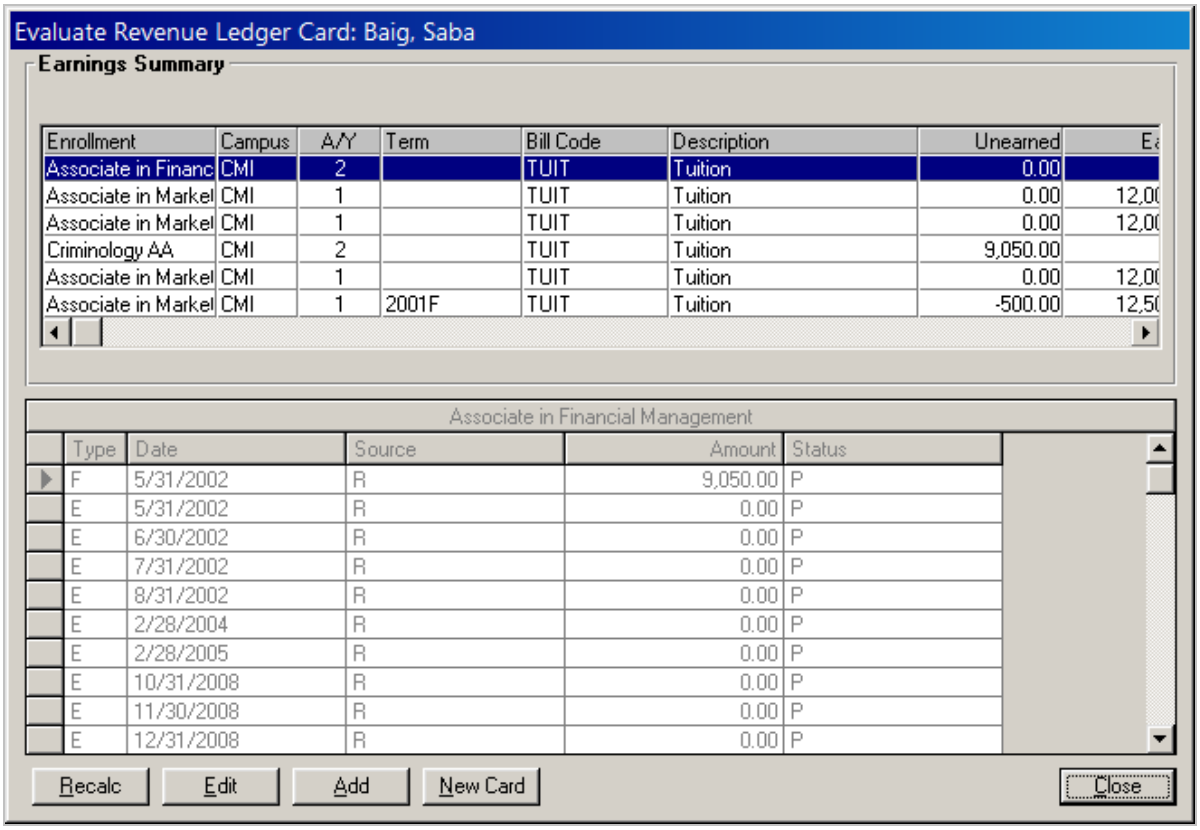
9. A confirmation message is displayed when the revenue has been successfully posted.

Evaluate

10. Click **Evaluate** to run a procedure that lists revenue ledgers with problems. If no problems are found, CampusNexus Student displays a completion message. If problems are found, the form lists all revenue cards where the enrollment revenue totals do not match the revenue detail calculated amounts. CampusNexus Student also lists revenue cards where the enrollment revenue Last Earn Date does not match the revenue detail calculated date.

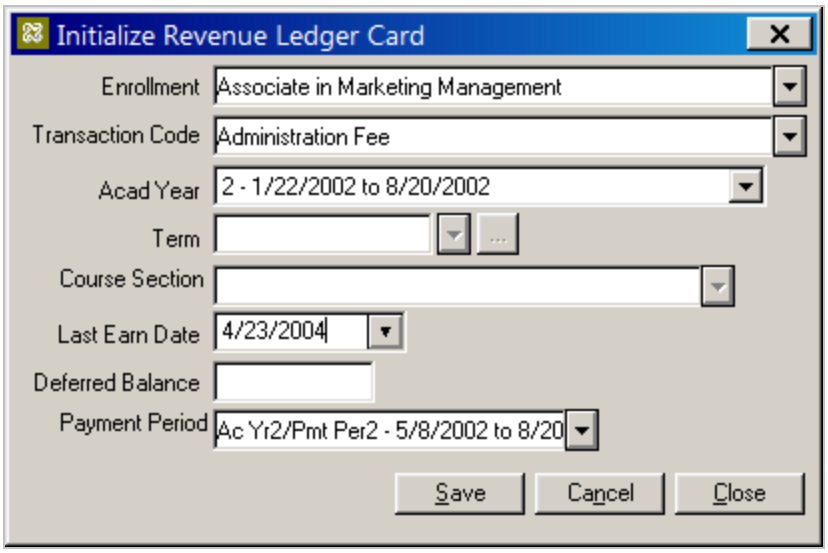


11. If exceptions are displayed, select a record and click **Evaluate** to see the student's Revenue records for each enrollment.



Note: When a bill code transaction is set up to earn over the life of a course, the Description column displays the Course Section: Description. If not, the description found in the SABillCode table is displayed.

12. Click an **Enrollment** and click **Recalc** to recalculate the revenue.
13. Click **Edit** to enable the bottom portion of the form. Edit the **Date**, **Source**, **Amount**, or **Status** fields and click **Save** to retain your changes.
14. Click **Add** to change the **Type** of revenue.
15. Click **New Card** to initialize an empty revenue ledger. CampusNexus Student displays the **Initialize Revenue Ledger Card** form.

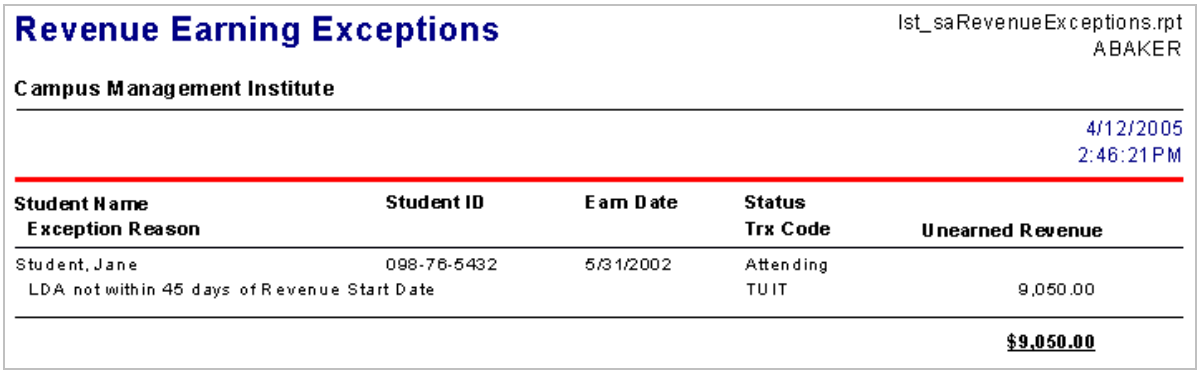


Note: The Course Section list is enabled when the following criteria are met:

- Billing Method is set to 'Bill by Course'.
- Earning Method is set to 'Course Section'.
- Transactions are posted to the ledger under a 'TUIT' code.

CampusNexus Student presents fields for Enrollment, Transaction Code, Course Section, and Last Earn Date and creates a new revenue ledger. The Acad Year and Term fields are controlled by the Billing Method for the Enrollment. If the enrollment is billed by Academic Year, the Acad Year field is enabled. If by Term, the Term field is enabled. If by program, Acad Year and Term are disabled.

16. Click **Next**. The wizard lists the students for whom revenue is recognized. If any exceptions are found, a message is displayed.
17. Click **OK** to list the exceptions. CampusNexus Student generates the Revenue Earning Exceptions report.



Revenue Earning Exceptions

lst_saRevenueExceptions.rpt
ABAKER

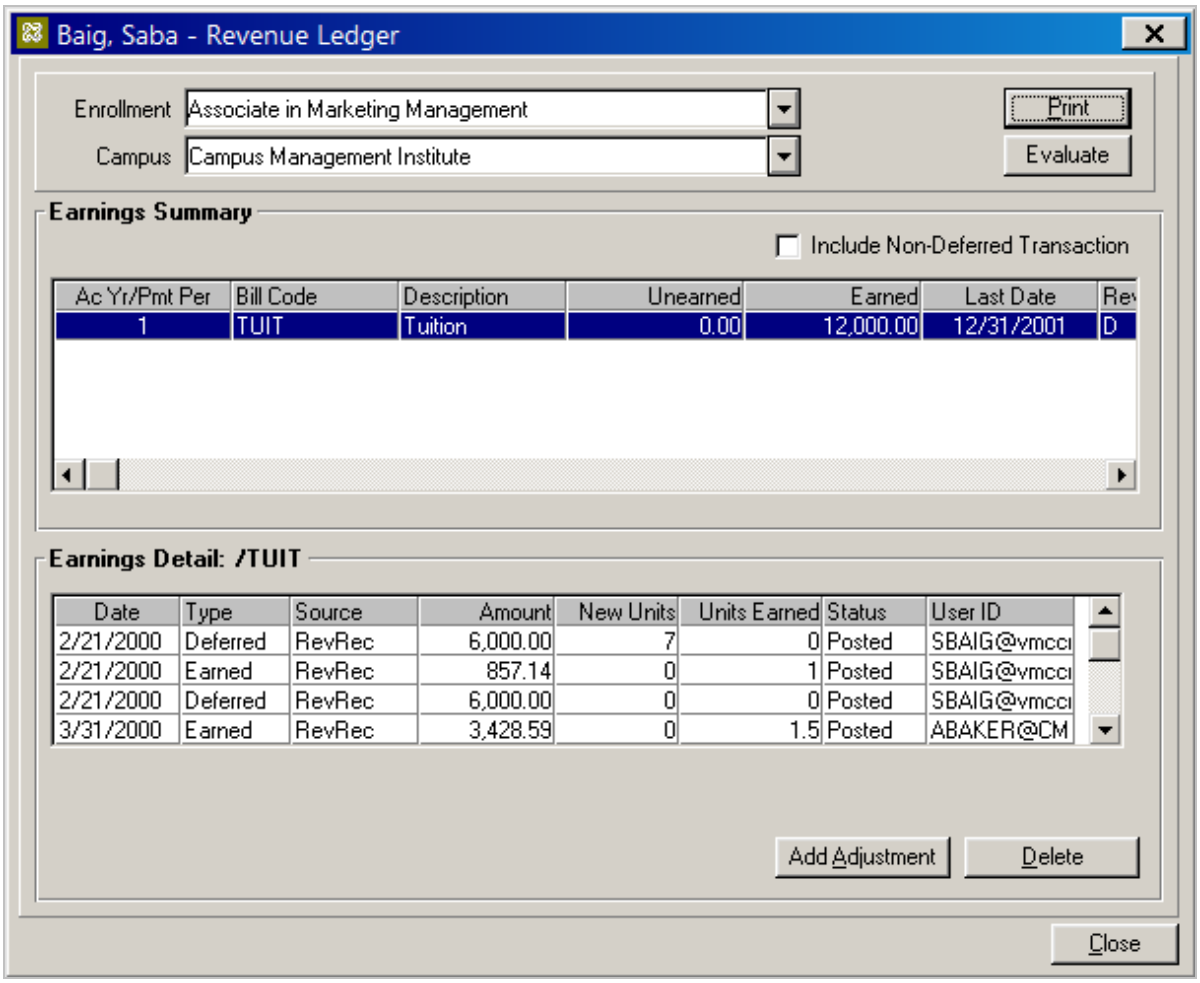
Campus Management Institute

4/12/2005
2:46:21 PM

Student Name / Exception Reason	Student ID	Earn Date	Status / Trx Code	Unearned Revenue
Student, Jane	098-76-5432	5/31/2002	Attending	
LDA not within 45 days of Revenue Start Date			TUIT	9,050.00
				$9,050.00

18. Select a student record on the Revenue Recognition form and click **View Detail** to see additional details for the row.

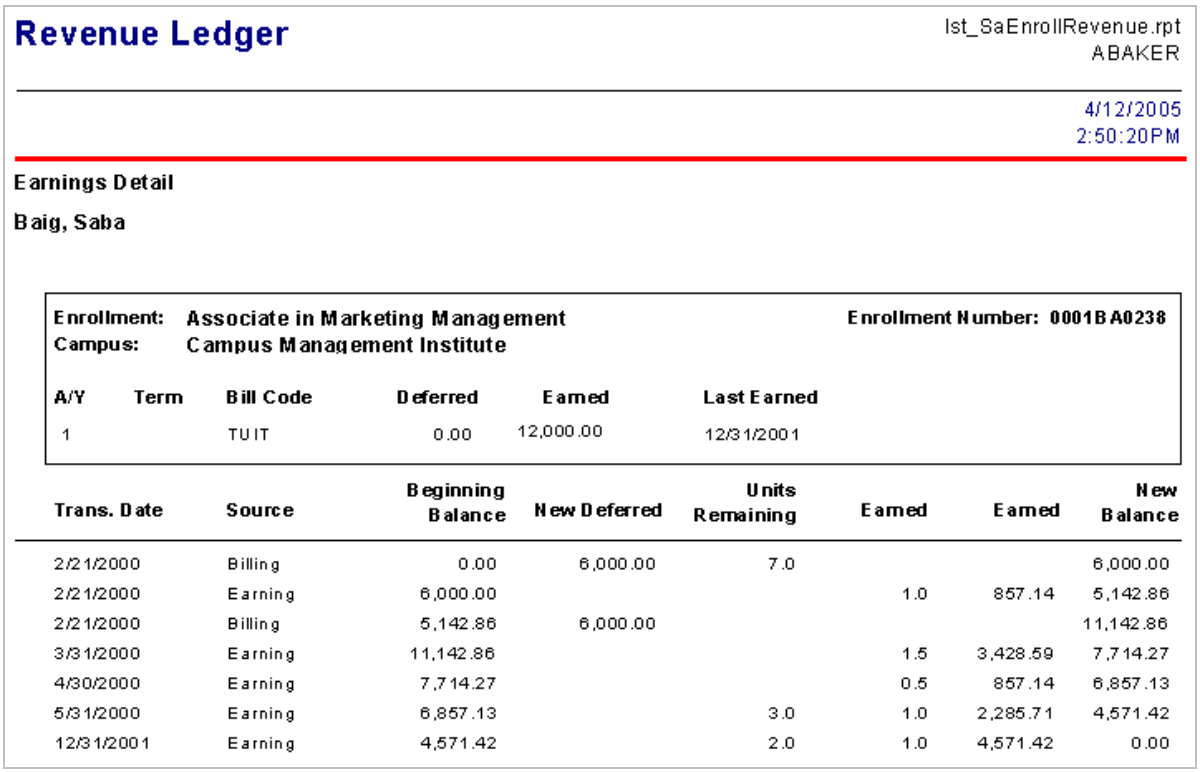
19. Select a student record on the Revenue Recognition form and click **Revenue Ledger** to see the related ledger.



Note: When a bill code transaction is set up to earn over the life of a course, the Description column displays the Course Section: Description. If not, the description found in the SABillCode table is displayed.

20. Click **Print** to print the Revenue Recognition report. The report output is configurable as Revenue Summary Report

or Revenue Detail Report depending on which option is chosen in the Student Accounts Settings on the **Revenue** tab. Depending on whether a Custom Revenue Report is configured, the output may appear different from the example below.



Revenue Ledger

lst_SaEnrollRevenue.rpt
ABAKER

4/12/2005
2:50:20PM

Earnings Detail

Baig, Saba

Enrollment: Associate in Marketing Management **Enrollment Number:** 0001BA0238
Campus: Campus Management Institute

A/Y	Term	Bill Code	Deferred	Earned	Last Earned
1		TUIT	0.00	12,000.00	12/31/2001

Trans. Date	Source	Beginning Balance	New Deferred	Units Remaining	Earned	Earned	New Balance
2/21/2000	Billing	0.00	6,000.00	7.0			6,000.00
2/21/2000	Earning	6,000.00			1.0	857.14	5,142.86
2/21/2000	Billing	5,142.86	6,000.00				11,142.86
3/31/2000	Earning	11,142.86			1.5	3,428.59	7,714.27
4/30/2000	Earning	7,714.27			0.5	857.14	6,857.13
5/31/2000	Earning	6,857.13		3.0	1.0	2,285.71	4,571.42
12/31/2001	Earning	4,571.42		2.0	1.0	4,571.42	0.00

21. Review the report and decide whether to continue with the process. If changes are required before the process is completed, click **Cancel** to stop the wizard.
22. Click **Next** to proceed to the next page of the wizard. CampusNexus Student displays the sequential reference number to added to the revenue transactions as they are posted.
23. Click **Post/Finalize Revenue** to complete the revenue recognition process. A confirmation message is displayed when the process is completed.
24. Click **OK** to acknowledge the message and close the procedure.

Example of Revenue Recognition with Earnings Based on Academic Years

If an institution bills by academic year, the revenue earnings are "isolated" by academic year.

If the institution has a 2300-hour program, 900 hours, 900 hours, and 500 hours;
and the "Months In Academic Year" set up under Lists > Financial Aid are 7 months, 7 months, and 3 months;
and the tuition costs are $10,500, $10,500, and $3,900;
the revenue earnings is as follows:

Example of Revenue Recognition

Academic Year	Month	Total	Earn Amount	Remaining Balance
1	1	10,500	1,500	9,000
1	2		1,500	7,500

Academic Year	Month	Total	Earn Amount	Remaining Balance
1	3		1,500	6,000
1	4		1,500	4,500
1	5		1,500	3,000
1	6		1,500	1,500
1	7		1,500	0
2	1	10,500	1,500	9,000
2	2		1,500	7,500
2	3		1,500	6,000
2	4		1,500	4,500
2	5		1,500	3,000
2	6		1,500	1,500
2	7		1,500	0
3	1	3,900	1,300	2,600
3	2		1,300	1,300
3	3		1,300	0

Example of Revenue Recognition with Carryover Units for Billed by Academic Year and Earned by Attended Hours

When an institution has a Program Version configured to bill by Academic Year earning by 'Attended Hours' over the Billing method or Academic Year time frame, CampusNexus Student accurately attributes the extra hours attended during one Academic Year to the revenue units earned in the first month of earning for the next Academic Year. This scenario occurs when the student reaches the hours attended threshold for an academic year as well as extra hours on the same day. For example, if an Academic Year consists of 900 hours and on the last day of the Academic year the student achieves 901 hours of attendance or more, the hours greater than 900 are assigned to the next Academic Year. This now enables institutions to report revenue in a real time fashion for this configuration.

Note: A report can be run to provide a list of students who have extra revenue earning units carried over from one Academic Year to the next Academic Year in a given month. Navigate to: Reports > Student Accounts > Revenue Earnings-Carryover Units and follow the standard report generation process to view the report. For more information see Revenue Earnings - Carryover Units Report.

"Term" code for Term-based institutions and "Months Remaining to Earn" for Program-based institutions are included on the report produced during the revenue calculation process.

The revenue earnings by program procedure checks the Extern Begin Date for the Enrollment. If there is an Extern Begin Date, the revenue is earned from the Start Date through the Extern Begin Date. If there is no Extern Begin Date for the enrollment, the revenue is earned through the Graduation Date.

When earning revenue, Standard Period of Non-Enrollment (SPN) students need to earn on the month that they started the SPN. LOAs do not earn on the first month of the LOA. If the enrollment status is an SPN status, CampusNexus Student earns revenue if the month being earned is the same month as the SPN start date. If the month being earned is after the SPN start date, CampusNexus Student does not earn revenue for the enrollment for the month.

If you cancel the revenue, the **Last Earn Date** is reset. In the revenue calculation procedure, even if $0 is calculated, a revenue detail record is written. This ensures that the revenue report prints all students with deferred balances.

Future Starts: If a student has transferred to or otherwise started another enrollment, CampusNexus Student uses the start date for the new enrollment if it is after the last earn date.

Depending on a term's start and end dates, the revenue calculation will calculate that a term is x.5 months long. Some institutions will want to earn only X months of revenue. They can set the **Revenue Units** field under Terms to override the term length calculation. This setting only applies to institutions that bill by term and earn by month. If the total number of credits scheduled for the Term that was billed is zero, nothing will be earned. You must update the total number of credits on the revenue header, or register the student for some courses to earn the revenue. This only occurs when earning by Term - Course/Credits.

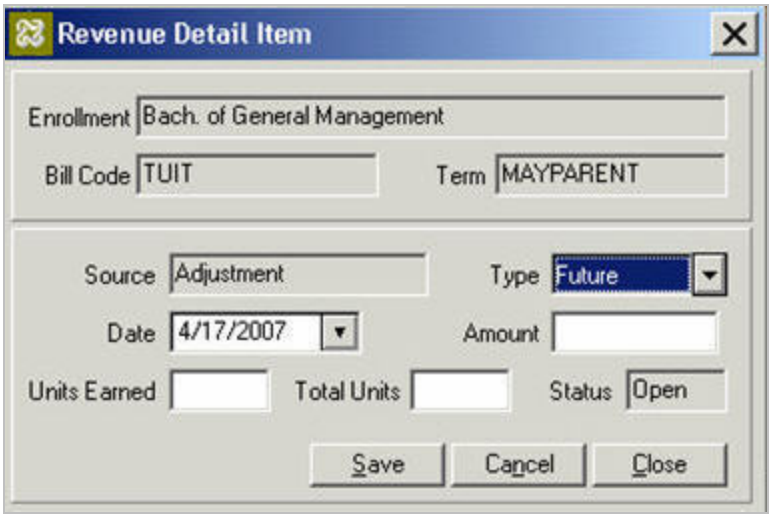
Examples of Billed by Parent Term and Earned by Child Term

1. Open a student's revenue ledger.
2. The **Deferred Revenue Balance** is calculated for each *Child* revenue record associated with the *Parent* Term that is charged on the ledger card, and then posted on the ledger card.
3. When the 'Adjust Earned/Total Units for Holidays' option is configured, the number of units to earn is reduced by the number of holiday days that are configured within the child term begin and end dates.
4. The number of units earned in the period is calculated using the child term begin date.
5. Revenue header information is tracked for the parent term associated with the charge on the ledger card as well. **Deferred Revenue Balances**, units to earn, total units earned and total revenue earned is rolled up from the child term revenue header records up to the parent term revenue header record.
6. The **Deferred Revenue Balance** allocation for child terms are recalculated each time the revenue calculation is run.

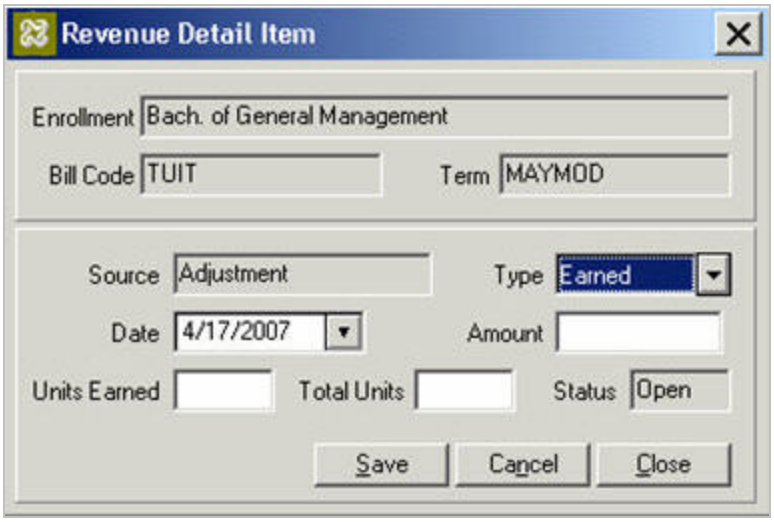
Add Adjustment

When adding an adjustment from the revenue ledger, you can select a child term when adding an adjustment. When calculating the revenue and a manual adjustment is found for the period being earned, CampusNexus Student adjusts the deferred revenue amount for the child revenue record (s).

1. Select the Type **Future** when adding an adjustment for a **Parent Term**.



2. Select the Type **Earned** when adding an adjustment for a **Child Term**.

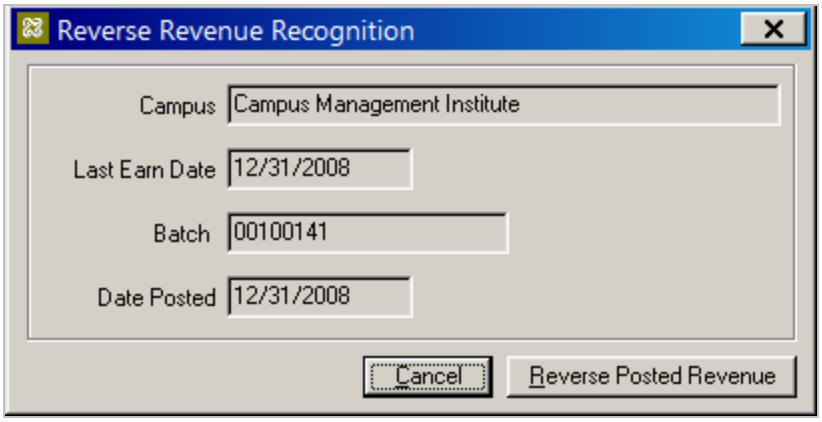


Reverse Revenue Recognition

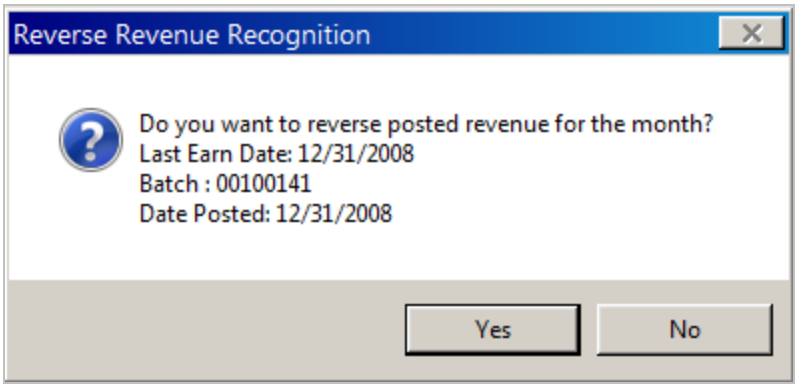
Use reverse revenue recognition to back out or reverse revenue recognition that has been performed in error. You can only perform this for the prior month and before the transaction has been released to the General Ledger.

To reverse revenue recognition:

1. Set your default campus to be the one for which reverse revenue recognition is to be processed.
2. Navigate to **Daily** > **Student Accounts** > **Reverse Revenue Recognition**. The Reverse Revenue Recognition form is displayed.



3. Click **Reverse Posted Revenue**. A confirmation message is displayed.



4. Click **Yes** to proceed. CampusNexus Student sets the record status to "O" (open), retrieves the posting date of the last posted revenue batch for the campus, deletes the posted revenue transactions for that batch from the student's revenue ledger cards, and recalculates the earned/unearned balance.
5. A confirmation message is displayed. Click **OK**.
6. Click **Close** to close the form.

CampusVue Finance, HR & Payroll Bank Reconciliation

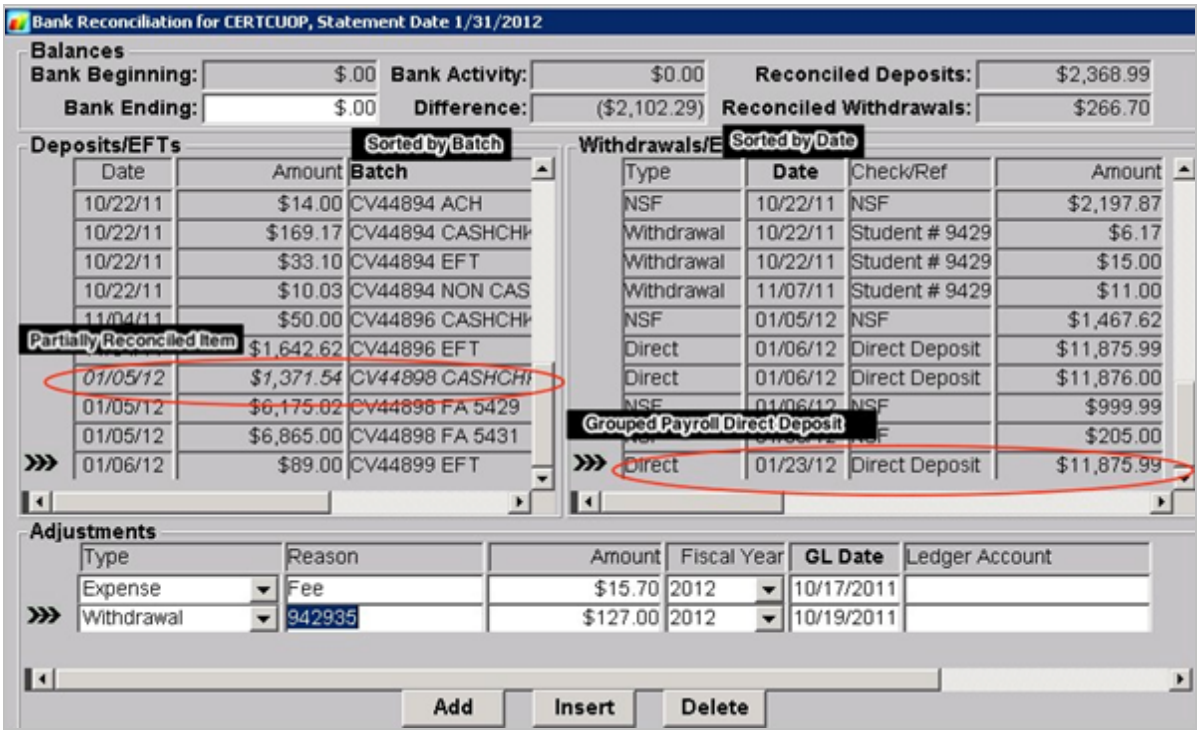
Beginning with CampusNexus Student Release 12.1.A, the Bank Reconciliation in CampusVue Finance, HR & Payroll has been improved to make comparing deposits from a bank statement to the bank reconciliation easier. The new items are:

- Columns can be sorted by clicking on the column headings.
- All Deposits from CampusNexus Student show the Batch ID followed by Type in the Batch column.
- Deposits and Withdrawals can be partially reconciled by right-clicking on the row and selecting items in the detail window.
- On the main Bank Reconciliation screen partially reconciled items are italicized.
- The "Search for" menu item has been added.

Users can search the Bank Reconciliation screen by the following items: Deposits/EFTs, Withdrawals/EFTs, Adjustments, and Repeat Last Search.

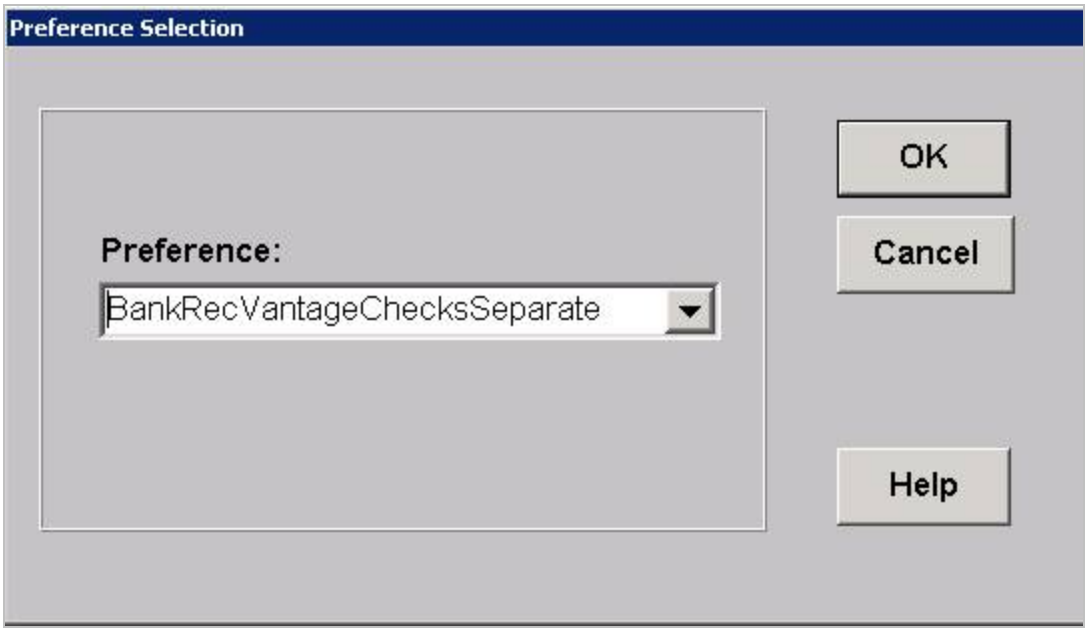
- Allowable search criteria for Deposits are Amount, Batch, and Date.
- Allowable search criteria for Withdrawals are Amount, Batch, Check/Ref, Date, Remarks, Source, and Type.
- Allowable search criteria for Adjustments are Amount, Cost Account, Fiscal Year, GL Date, Ledger Account, Reason, and Type.
- Clicking the F11 key will repeat the previous search.
- The Action Menu includes “Adjustment Column Edit” to auto fill multiple rows in the Adjustment window.
- The Cost Account, Ledger Account, and Reason columns can be edited by using the Adjustments Column Edit action. In addition, users can indicate the fill direction by choosing one of the following items from the Row Range drop-down:
    - All Rows
    - Current Row to Last Row
    - Current Row to First.
- A new preference, BankRecDDBatch, has been added that groups Payroll Direct Deposits by Batch ID on the main Bank Reconciliation screen with the ability to right-click and drill down to details.

New Bank Reconciliation Form

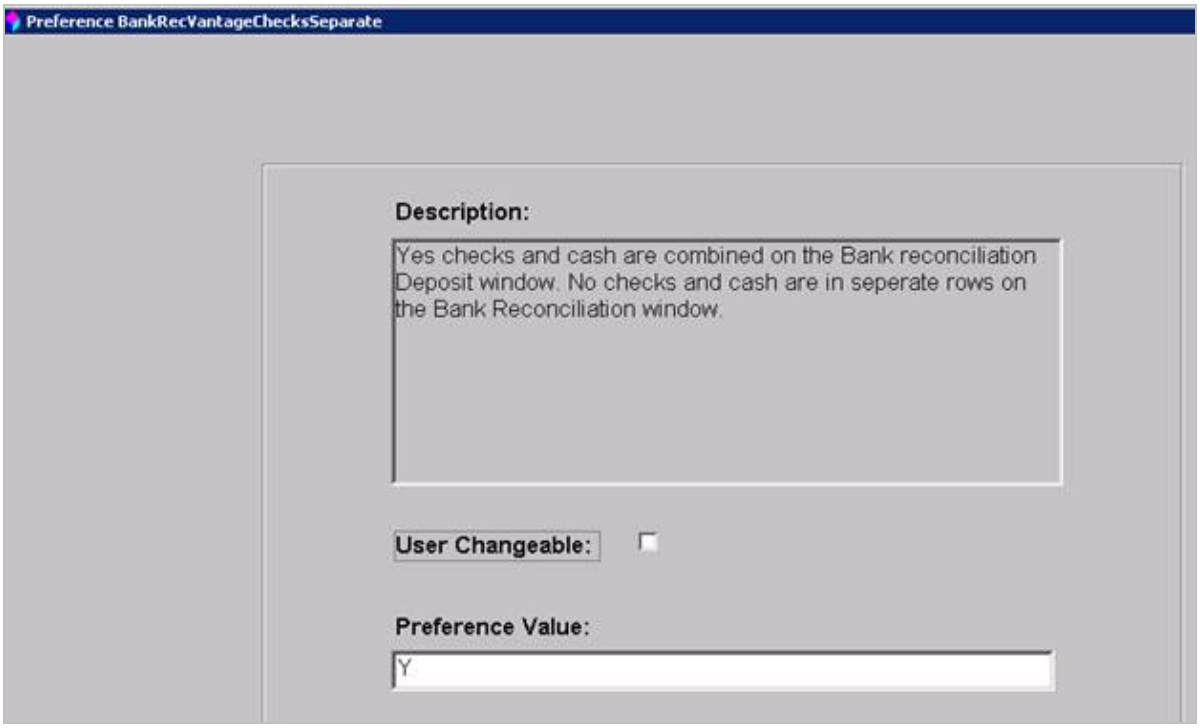


Admin Preferences

CampusVue Finance, HR & Payroll Admin Preferences contains a preference titled "BankRecVantageChecksSeparate".



There are two options available after you click OK. Y means that your Checks and Cash are separated. **N** means that you want the two combined.



Deposit Type Grouping on Bank Reconciliation Form

On Bank Reconciliation, the following types of deposits and how they are grouped will now appear on the bank reconciliation form.

Grouping of Deposit Types

Payment Type Abbreviation	Payment Type in words	Grouping	Exceptions/Comments
C	Cash ***	Grouped by Deposit ID and Date of Deposit ***	
H	Checks ***	Grouped by Deposit ID and Date of Deposit ***	Financial Aid Disbursement Check is recorded separately.
E	EFT	Individual item, includes EFT, Student ID and a unique identifier in the Batch column	Financial Aid Disbursement EFT is recorded separately.
I	ACH	Individual item, includes ACH, Student ID and a unique identifier in the Batch column	Financial Aid Disbursement ACH is recorded separately.
N	NON CASH	Individual Item. Includes NON CASH and a unique identifier in the Batch column	Financial Aid Disbursement for Non Cash is recorded separately.

Payment Type Abbreviation	Payment Type in words	Grouping	Exceptions/Comments
R	CREDIT CARD	Grouped by Deposit ID and Date of Deposit. Batch Column includes CCARD and CV + deposit id (from CampusNexus Student)	
H if Check, I if ACH, E if EFT	FA Disbursement	A separate line in the Batch field contains the letters FA and the Disbursement batch number	Can be a check, an EFT or an ACH

*** Cash and checks can be combined or displayed separately. If they are separate, the batch column will show CASH plus the associated CV Bank Deposit ID, and CHECKS plus the associated CV Bank Deposit ID. If they are combined, it will show CASHCHK plus the associated CV Bank Deposit ID.

If a student payment is later voided, it will appear on the Bank Reconciliation individually as an NSF Type in the Withdrawals portion of the Bank Reconciliation. On the Deposit portion of the Bank Reconciliation, a void of refund or stipend electronic payments will show as the Bank Alias and the date in YYYYMMDD format. If there is more than one refund or stipend voided for a given date, it will be combined. The details can be seen by right-clicking the Date on the Deposit portion of the Bank Reconciliation form for that line.

Deposit Line Item Details

The next table explains the detail that you can obtain for each individual item when you right-click a Deposit line.

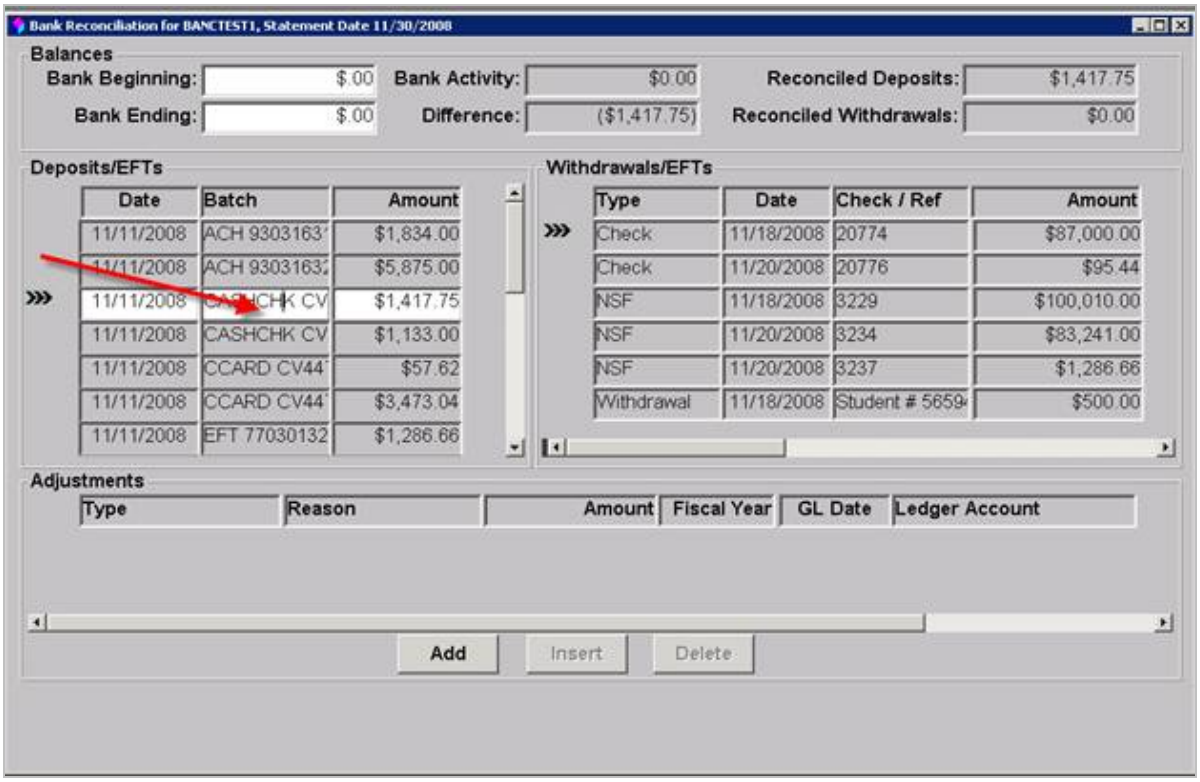
Deposit Line Items

Field Name	Explanation
Doc Class	CR for a Deposit, JE for a voided Electronic Refund or Stipend (EFT or ACH)
Document Type	C if it is a Deposit, CCA or ECA if it is a voided Electronic Refund or Stipend (EFT or ACH)
Document	Unique ID generated by CampusVue Finance, HR & Payroll if it is a Deposit. If it is a voided Electronic Refund or Stipend (EFT or ACH) it is a number that is generated from CampusNexus Student.
Amount	The amount of the item.
Reference	If this is a Miscellaneous Receipts or a Subsidiary transaction this is blank. Otherwise, this is the Student ID.
Remarks	If this is a deposit, this is the Payment Type Abbreviation (shown in the table above). If it is a voided Electronic Refund or Stipend (EFT or ACH) it will show a description of the transaction.
Reference2	If this is an FA Disbursement it will show the FA number. If it is a voided Electronic Refund or Stipend (EFT or ACH) it will show VOID. If this is any other type of Deposit it will be blank.
Document Date	The date the document was released to the General Ledger from CampusNexus Student.
Vue Deposit ID	If this is a deposit, this is the Deposit number generated by CampusNexus Student from the Bank Deposit Wizard. If this is a void it will show the Bank Alias plus the date in YYYYMMDD order.

Field Name	Explanation
Vue Deposit Date	Same as Document date (The date the document was released to the General Ledger from CampusNexus Student).
Document Source	If this is a deposit it is "Bank Dep CRC". If this is a voided Electronic Refund or Stipend (EFT or ACH) it is 'Bank Dep CCA or 'Bank Dep ECA'.
Check Number	If the Payment Type is H for Checks, this will show the Check Number.

Viewing the Batch ID

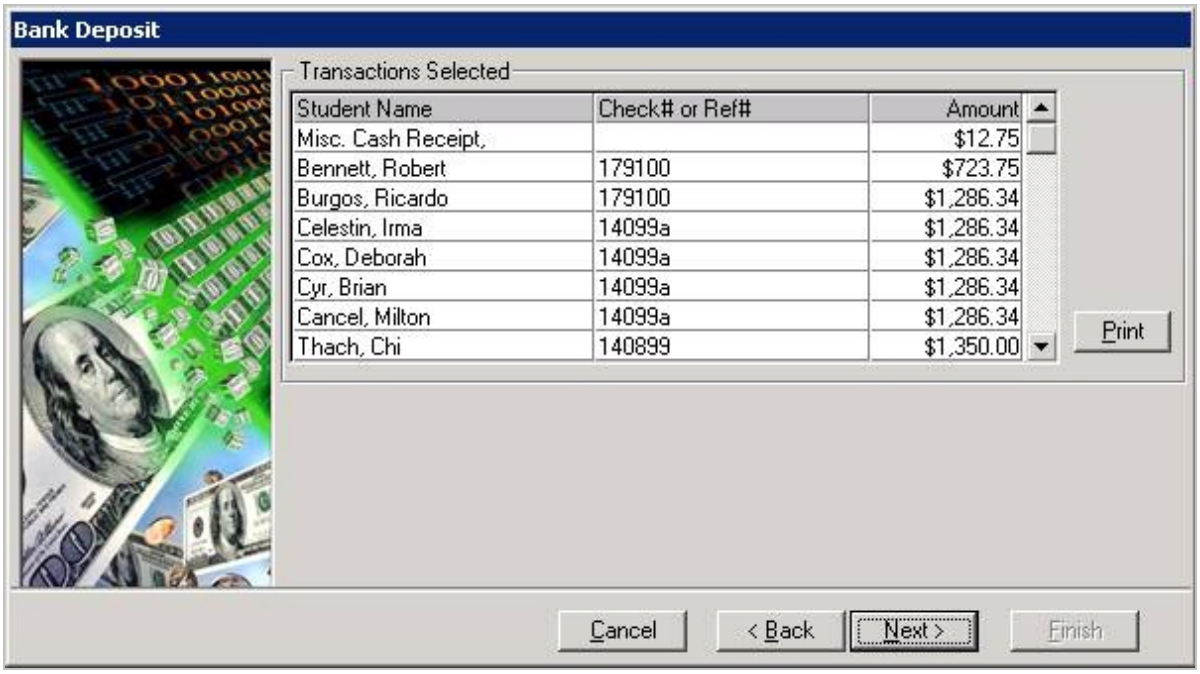
To see the full Batch ID, click on the Batch and scroll to the right.

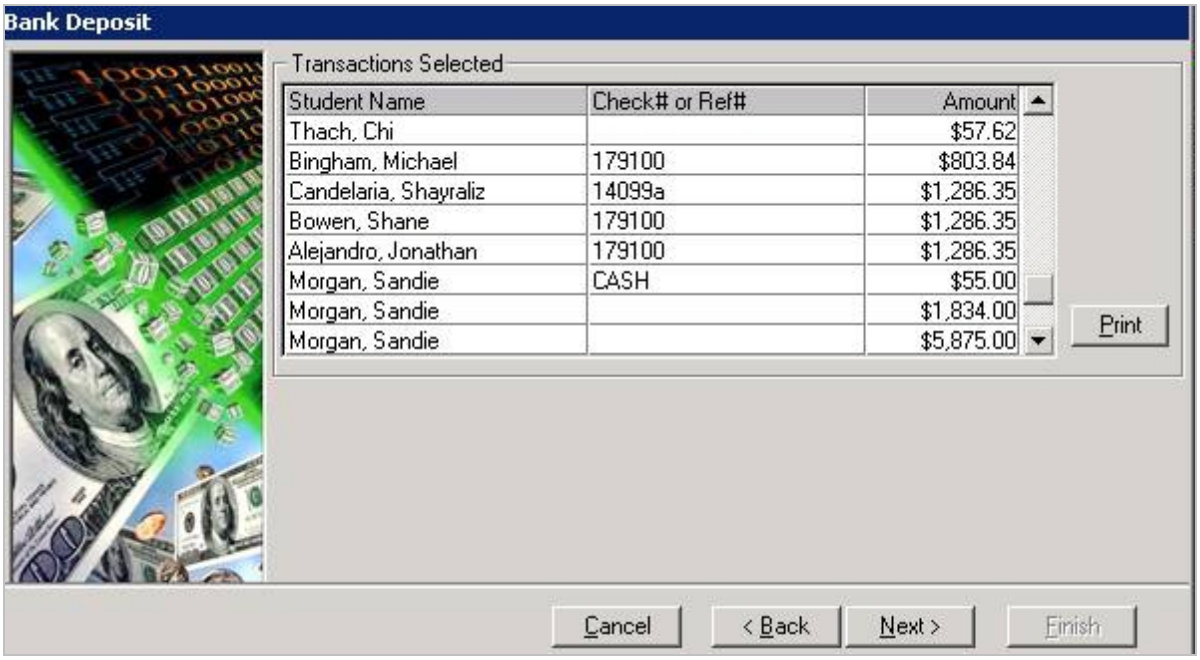


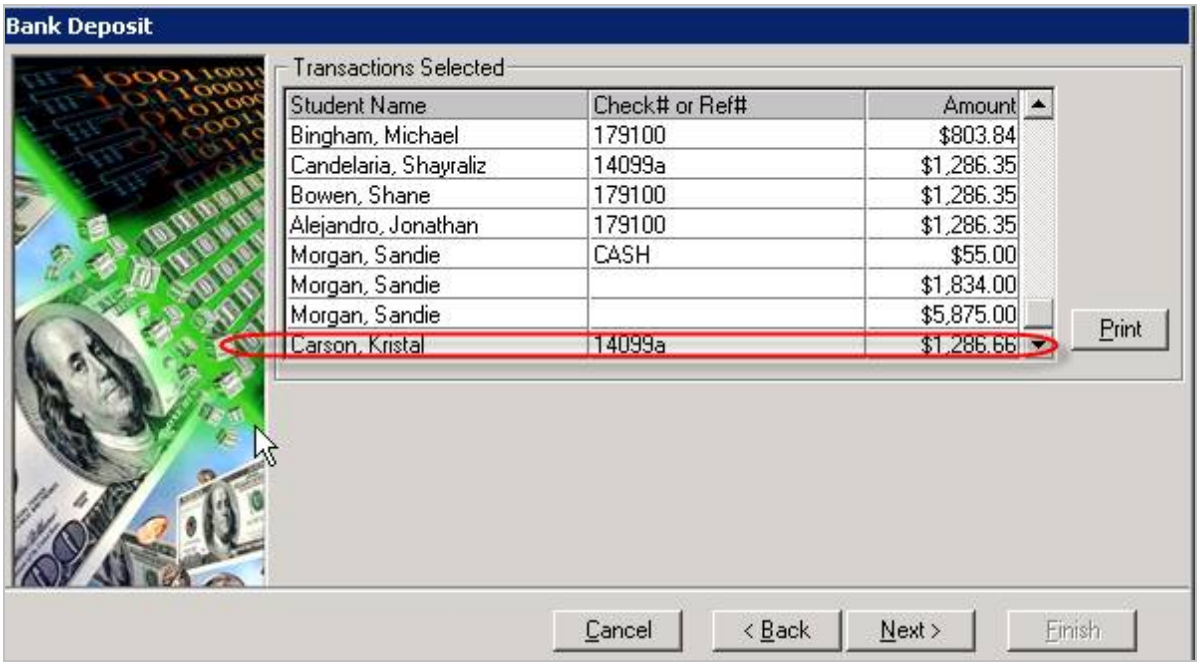
Example Bank Reconciliation Forms

The following graphics demonstrate the Bank Deposit Wizard and the new Bank Reconciliation form with sample deposit detail for 11/11/2008. The details are:

- Bank Name – BANCTEST1
- Deposit Number – CV44728 and CV44729
- Deposits for – CV44728


Bank Deposit
Transactions Selected
Student Name | Check# or Ref# | Amount
Misc. Cash Receipt, | | $12.75
Bennett, Robert | 179100 | $723.75
Burgos, Ricardo | 179100 | $1,286.34
Celestin, Irma | 14099a | $1,286.34
Cox, Deborah | 14099a | $1,286.34
Cyr, Brian | 14099a | $1,286.34
Cancel, Milton | 14099a | $1,286.34
Thach, Chi | 140899 | $1,350.00
Print
Cancel
< Back
Next >
Finish


Bank Deposit
Transactions Selected
Student Name | Check# or Ref# | Amount
Thach, Chi | | $57.62
Bingham, Michael | 179100 | $803.84
Candelaria, Shayraliz | 14099a | $1,286.35
Bowen, Shane | 179100 | $1,286.35
Alejandro, Jonathan | 179100 | $1,286.35
Morgan, Sandie | CASH | $55.00
Morgan, Sandie | | $1,834.00
Morgan, Sandie | | $5,875.00
Print
Cancel
< Back
Next >
Finish

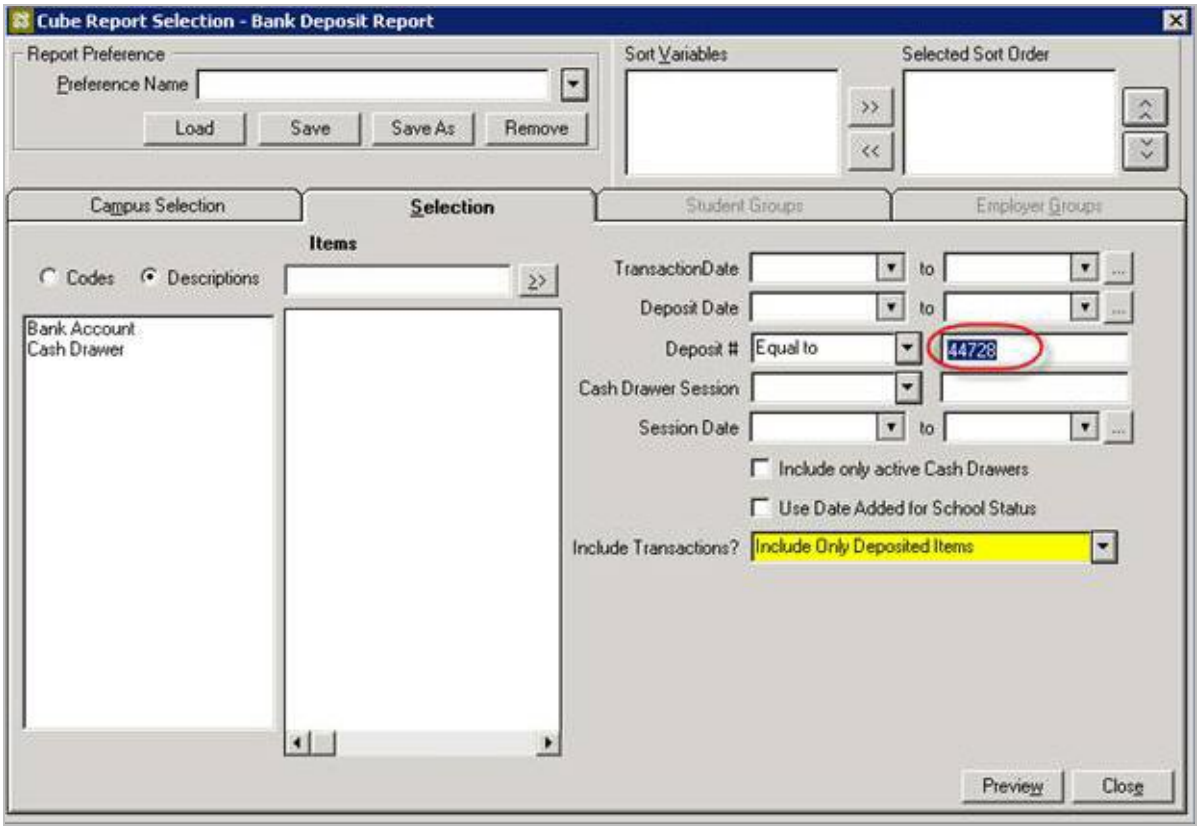


Note: The circled transaction could not be displayed on the prior form, due to the number of transactions.

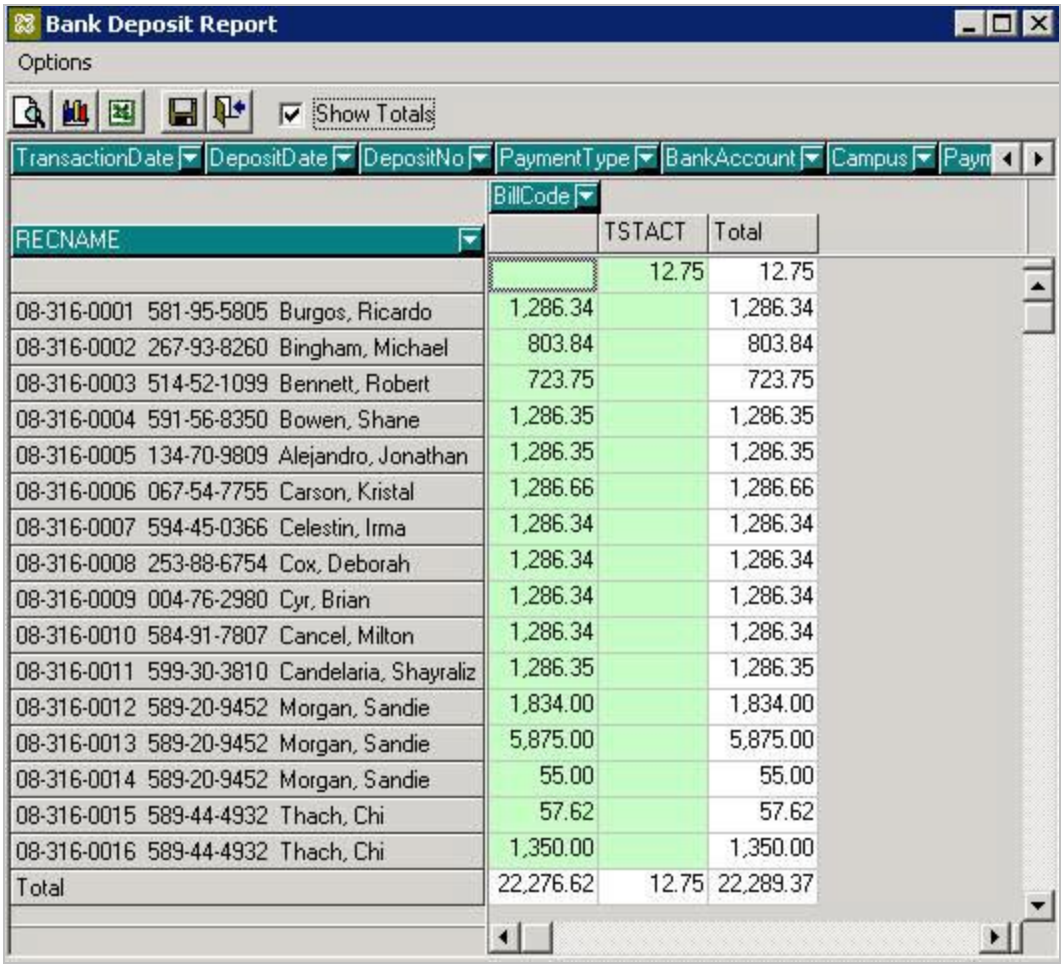
Summary of Transactions for CV 44728

Payment Description	Payment Type	Amount
1. Financial Aid Disbursement - 5 Students	Financial Aid Disbursement Check	5,386.63
2. Financial Aid Disbursement - 6 Students	Financial Aid Disbursement EFT	7,718.37
3. Student payment	ACH	1,834.00
4. Student payment	ACH	5,875.00
5. Student payment	Cash	55.00
6. Misc Receipts	Cash	12.75
7. Student payment	Credit Card	57.62
8. Student Pell Grant payment	Check	1,350.00
Total Deposit		22,289.57

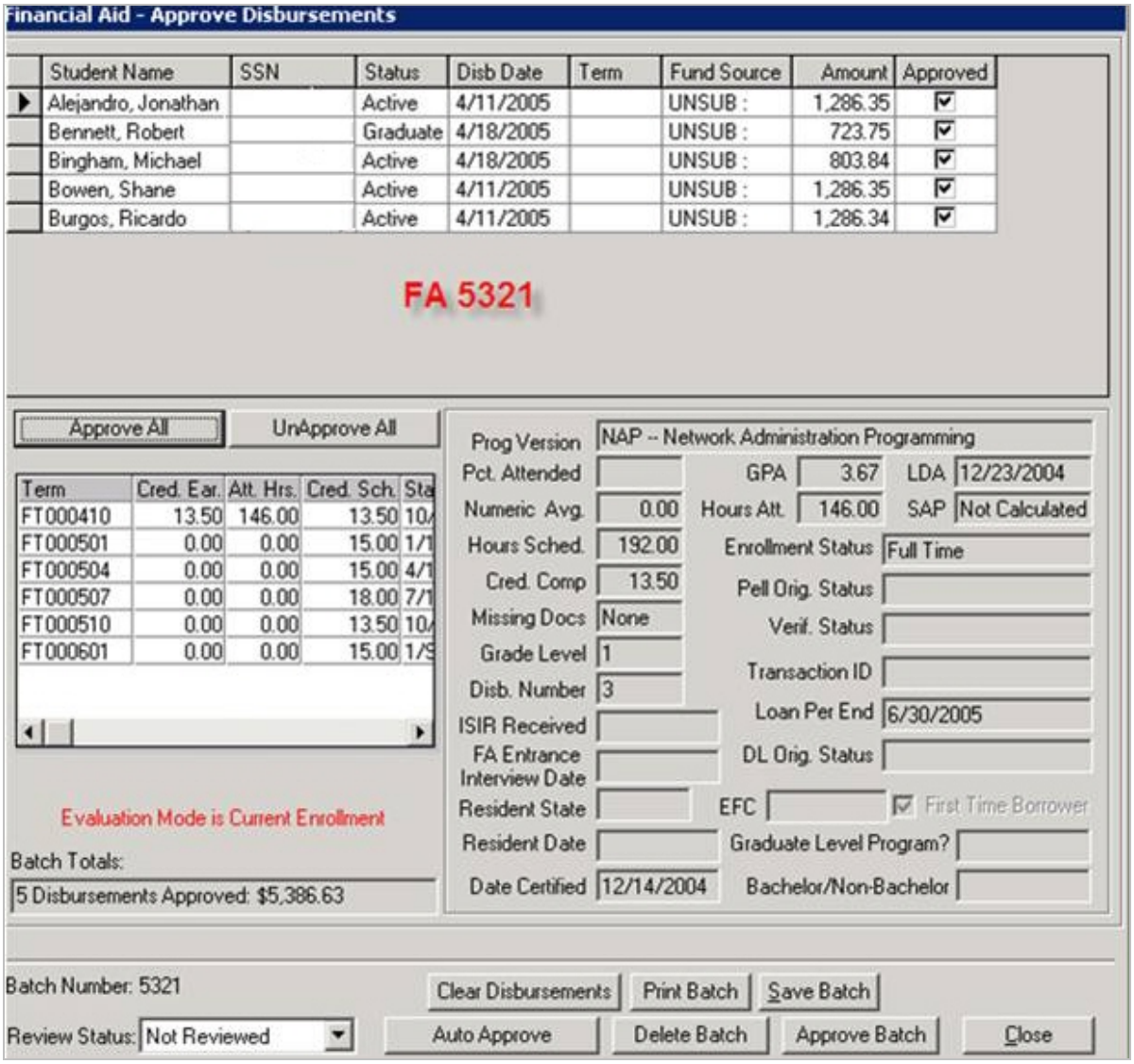
The Bank Deposit ID can also be used to run the Bank Deposit Report in CampusNexus Student. This report can also be run using the Bank Deposit Number as shown below.

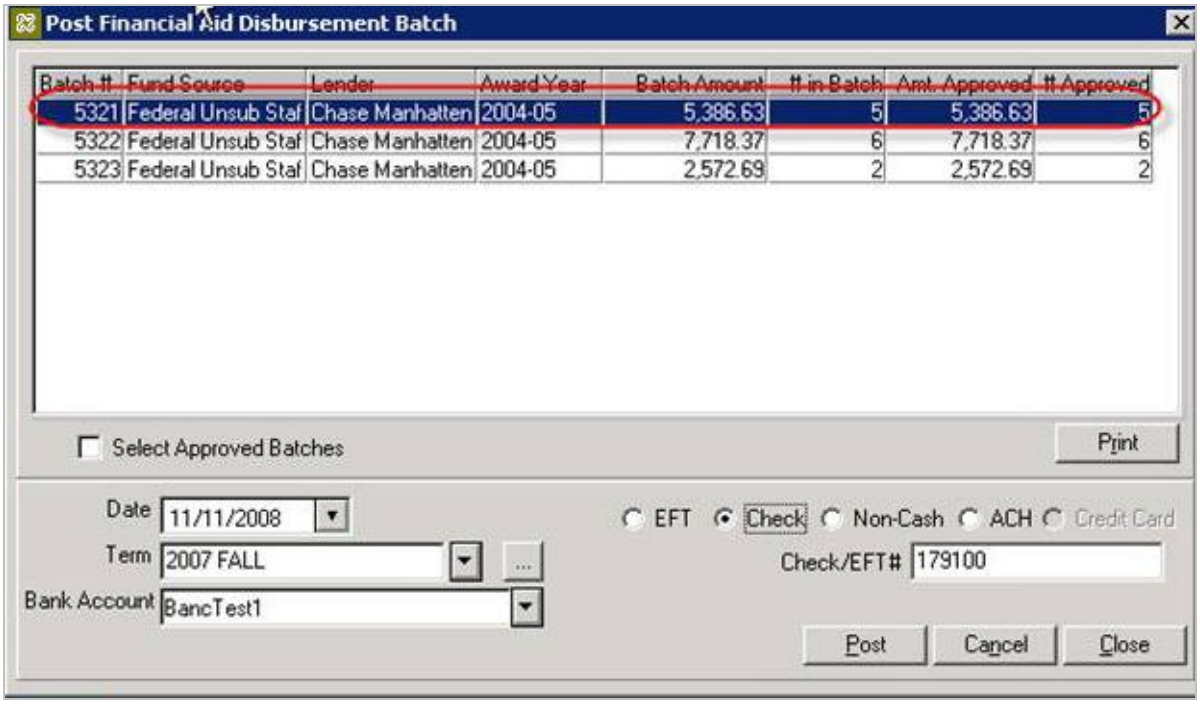


The following as the result of running this report, which can also be filtered by Payment Type, Campus, and the other fields shown on the report.

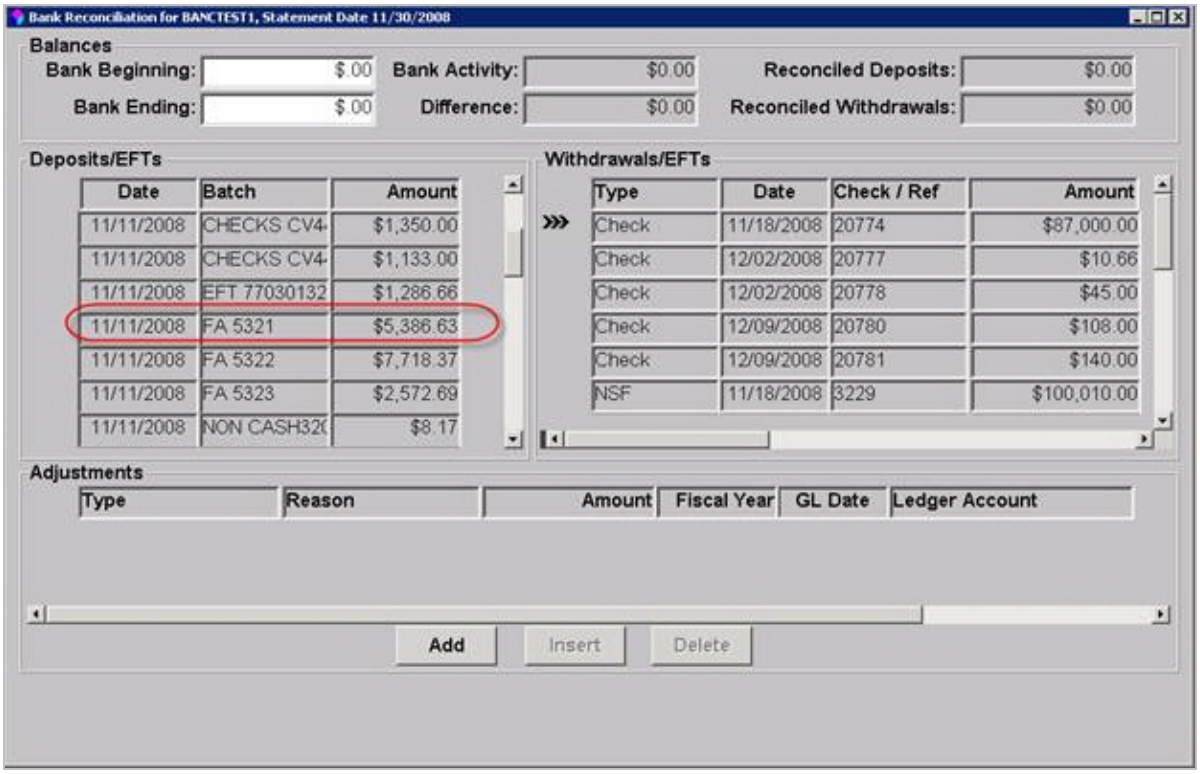

Bank Deposit Report
Options
Show Totals
TransactionDate
DepositDate
DepositNo
PaymentType
BankAccount
Campus
Paym
BillCode
RECNAME
TSTACT
Total
12.75 12.75
08-316-0001 581-95-5805 Burgos, Ricardo 1,286.34 1,286.34
08-316-0002 267-93-8260 Bingham, Michael 803.84 803.84
08-316-0003 514-52-1099 Bennett, Robert 723.75 723.75
08-316-0004 591-56-8350 Bowen, Shane 1,286.35 1,286.35
08-316-0005 134-70-9809 Alejandro, Jonathan 1,286.35 1,286.35
08-316-0006 067-54-7755 Carson, Kristal 1,286.66 1,286.66
08-316-0007 594-45-0366 Celestin, Irma 1,286.34 1,286.34
08-316-0008 253-88-6754 Cox, Deborah 1,286.34 1,286.34
08-316-0009 004-76-2980 Cyr, Brian 1,286.34 1,286.34
08-316-0010 584-91-7807 Cancel, Milton 1,286.34 1,286.34
08-316-0011 599-30-3810 Candelaria, Shayraliz 1,286.35 1,286.35
08-316-0012 589-20-9452 Morgan, Sandie 1,834.00 1,834.00
08-316-0013 589-20-9452 Morgan, Sandie 5,875.00 5,875.00
08-316-0014 589-20-9452 Morgan, Sandie 55.00 55.00
08-316-0015 589-44-4932 Thach, Chi 57.62 57.62
08-316-0016 589-44-4932 Thach, Chi 1,350.00 1,350.00
Total 22,276.62 12.75 22,289.37

Financial Aid Disbursement Check





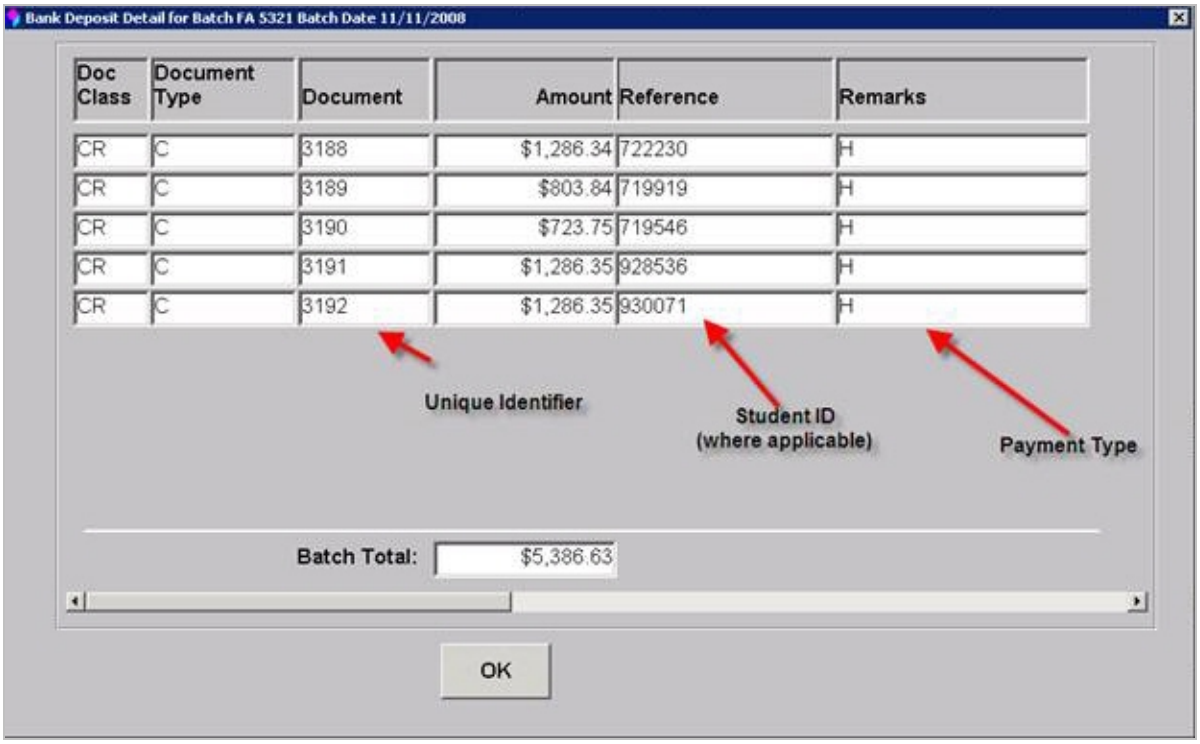
The applicable line item for the FA Disbursement Check in the new Bank Reconciliation form is circled in red in the next graphic.



Date Column Details

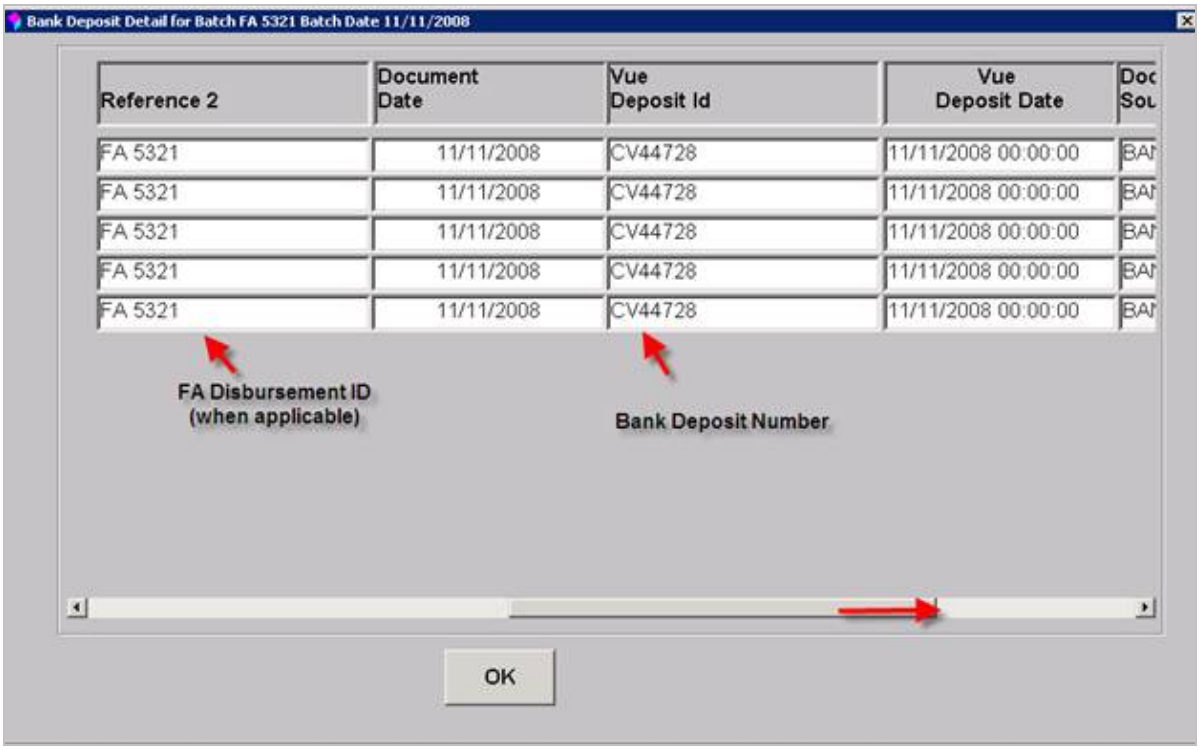
If you right-click in the date column of the Batch FA5321 you will see the following details.

First Form



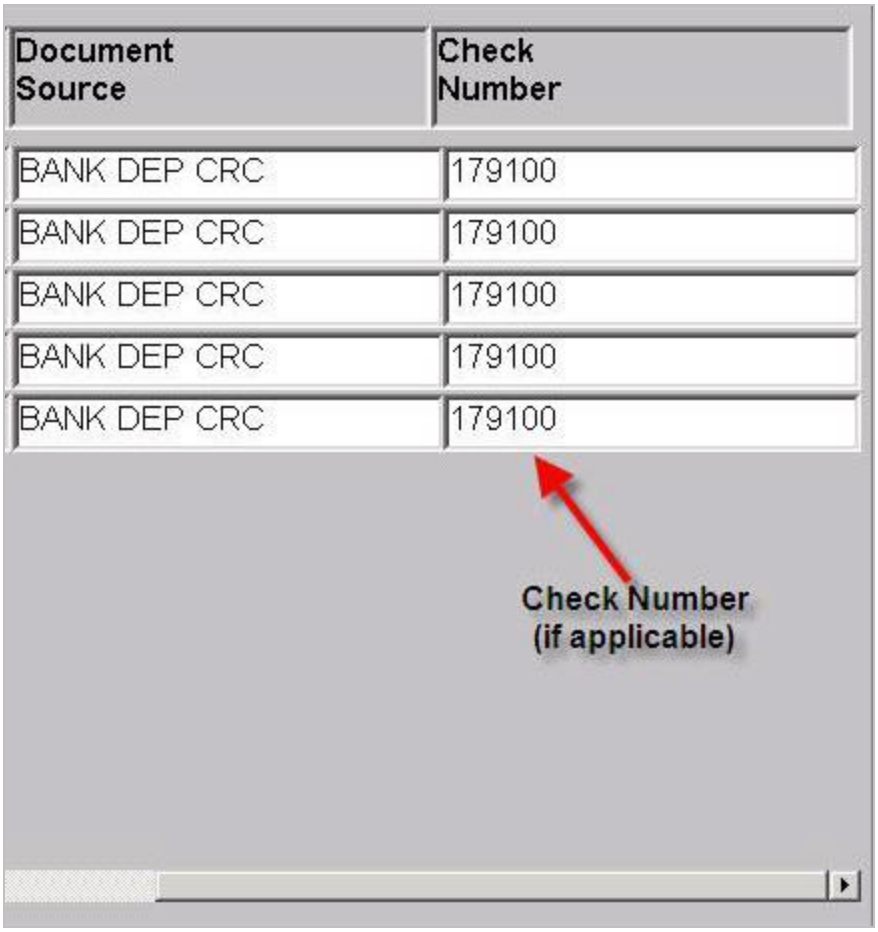
First Form - Second Screen

Scrolling to the right will show you more details as shown in the next graphic.



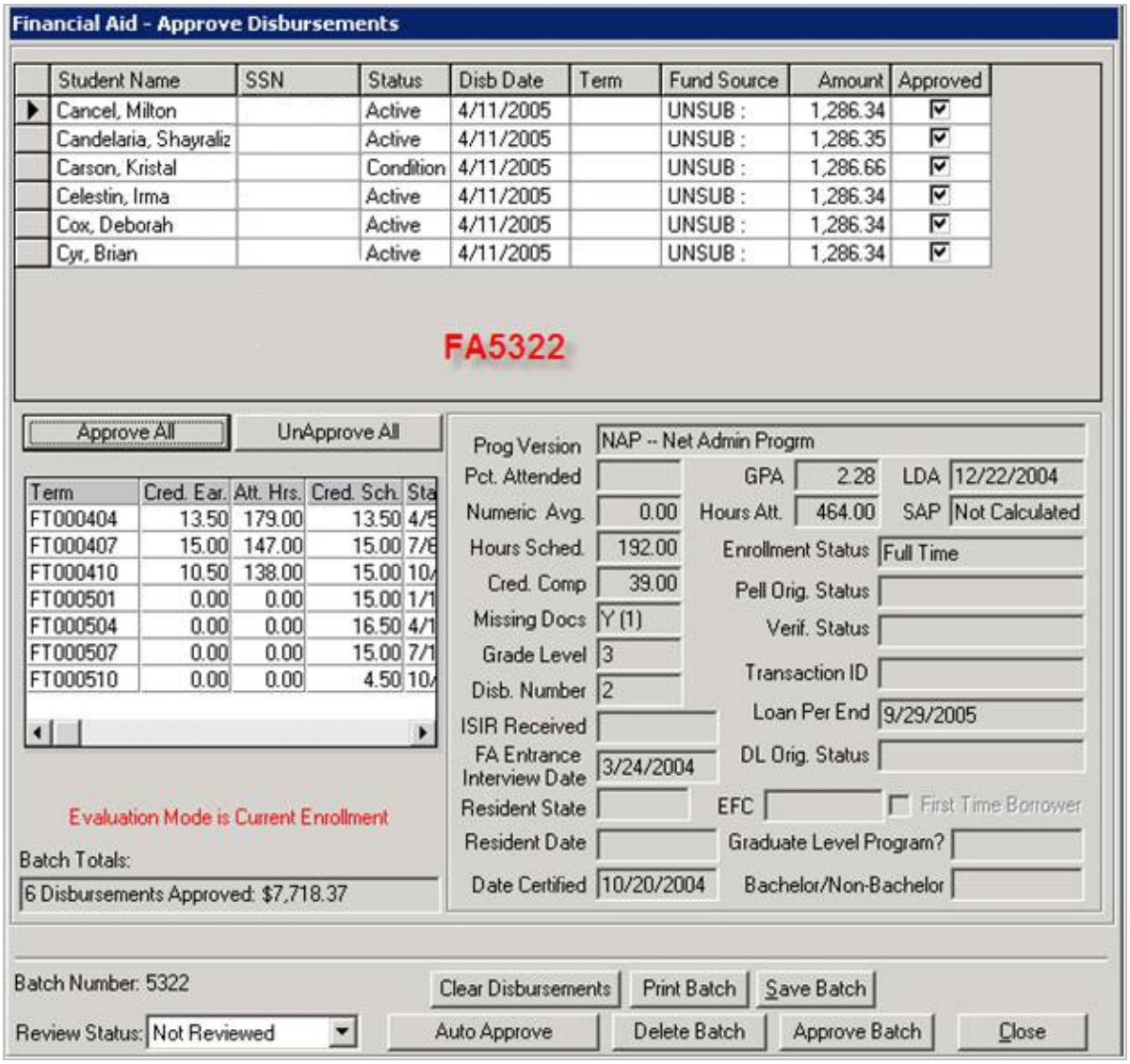
First Form - Third Screen

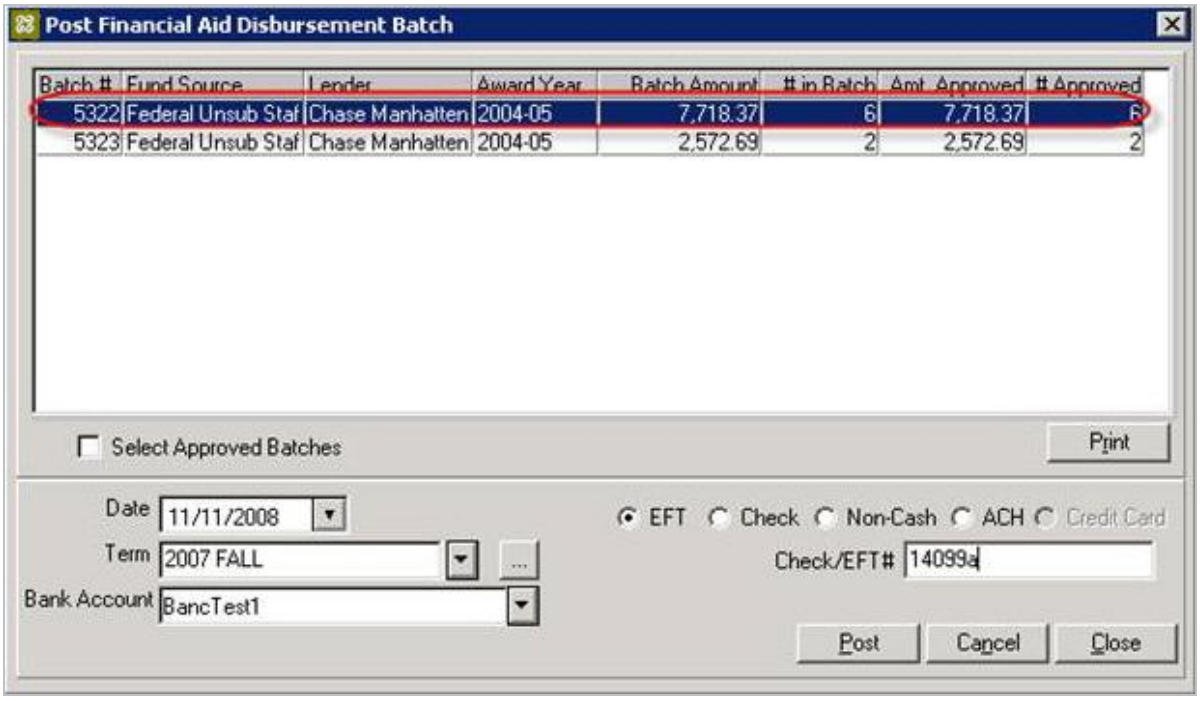
Scrolling to the right will show you more details as shown in the following graphic.



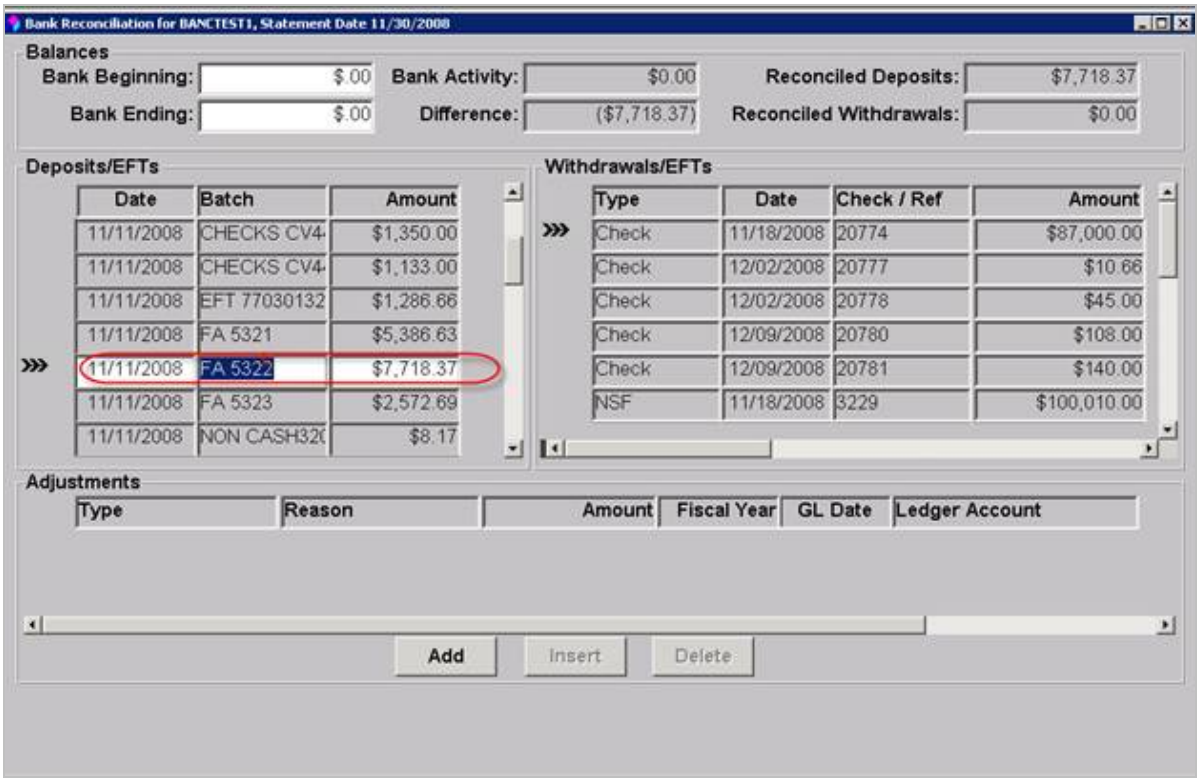
Financial Aid Disbursement EFT

The next graphics show the forms for Financial Aid Disbursement.

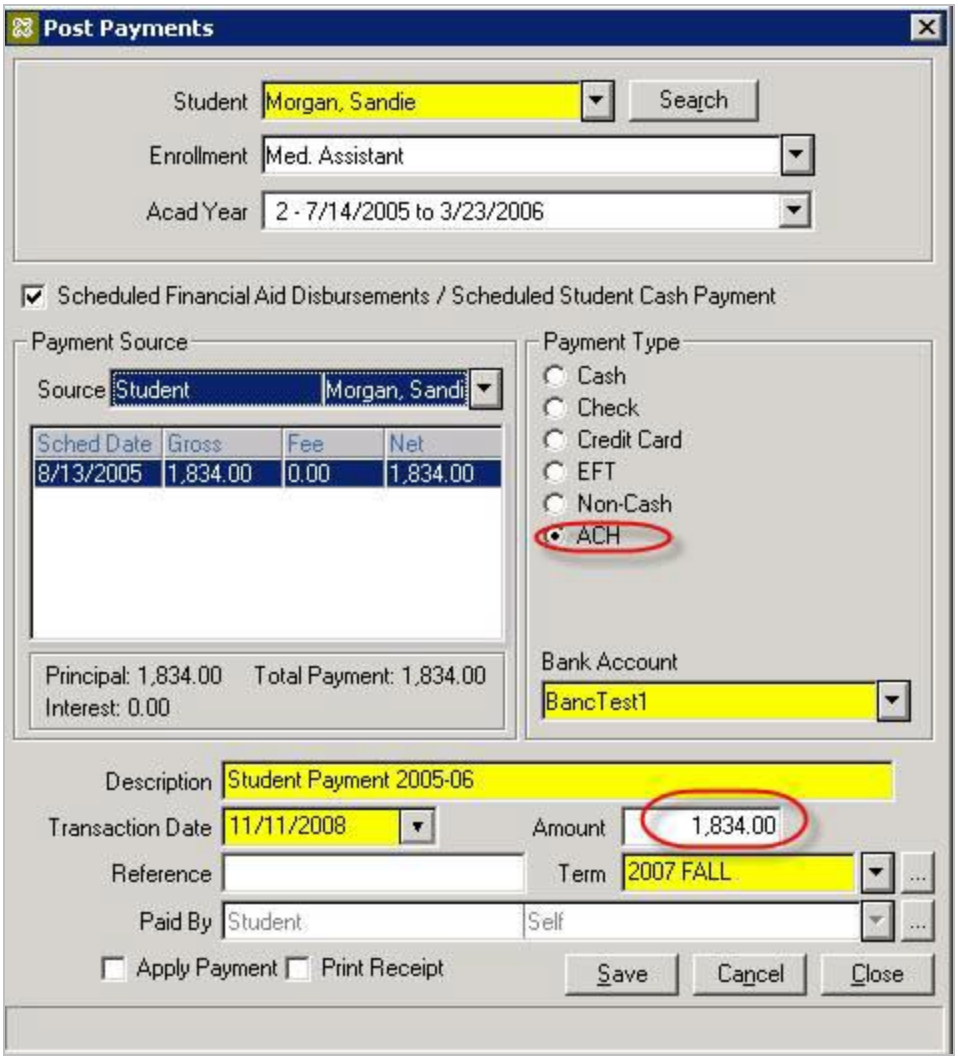

Financial Aid - Approve Disbursements
Student Name
SSN
Status
Disb Date
Term
Fund Source
Amount
Approved
Cancel, Milton
Active
4/11/2005
UNSUB :
1,286.34
Candelaria, Shayraliz
Active
4/11/2005
UNSUB :
1,286.35
Carson, Kristal
Condition
4/11/2005
UNSUB :
1,286.66
Celestin, Irma
Active
4/11/2005
UNSUB :
1,286.34
Cox, Deborah
Active
4/11/2005
UNSUB :
1,286.34
Cyr, Brian
Active
4/11/2005
UNSUB :
1,286.34
FA5322
Approve All
UnApprove All
Term
Cred. Ear.
Att. Hrs.
Cred. Sch.
FT000404
13.50
179.00
13.50
FT000407
15.00
147.00
15.00
FT000410
10.50
138.00
15.00
FT000501
0.00
0.00
15.00
FT000504
0.00
0.00
16.50
FT000507
0.00
0.00
15.00
FT000510
0.00
0.00
4.50
Evaluation Mode is Current Enrollment
Batch Totals:
6 Disbursements Approved: $7,718.37
Prog Version
NAP -- Net Admin Progrm
Pct. Attended
GPA
2.28
LDA
12/22/2004
Numeric Avg.
0.00
Hours Att.
464.00
SAP
Not Calculated
Hours Sched.
192.00
Enrollment Status
Full Time
Cred. Comp
39.00
Pell Orig. Status
Missing Docs
Y (1)
Verif. Status
Grade Level
3
Transaction ID
Disb. Number
2
Loan Per End
9/29/2005
ISIR Received
FA Entrance Interview Date
3/24/2004
DL Orig. Status
Resident State
EFC
First Time Borrower
Resident Date
Graduate Level Program?
Date Certified
10/20/2004
Bachelor/Non-Bachelor
Batch Number: 5322
Clear Disbursements
Print Batch
Save Batch
Review Status:
Not Reviewed
Auto Approve
Delete Batch
Approve Batch
Close



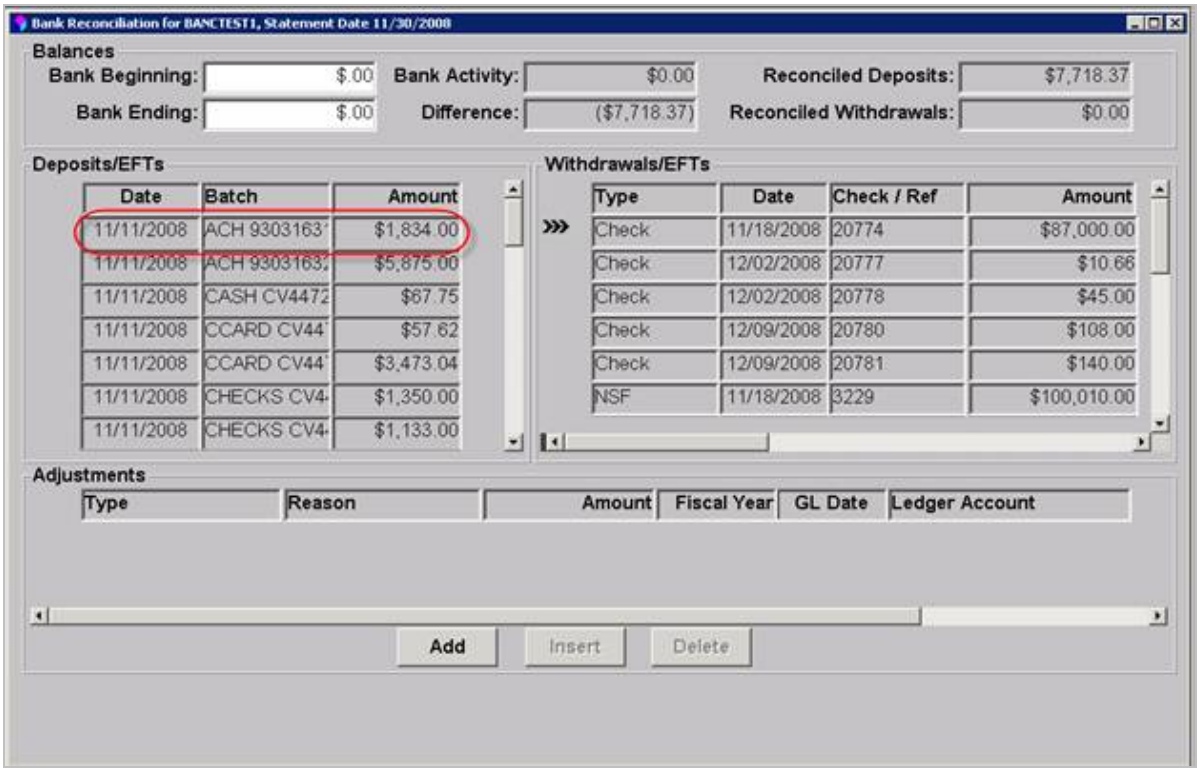
On Bank Reconciliation Form

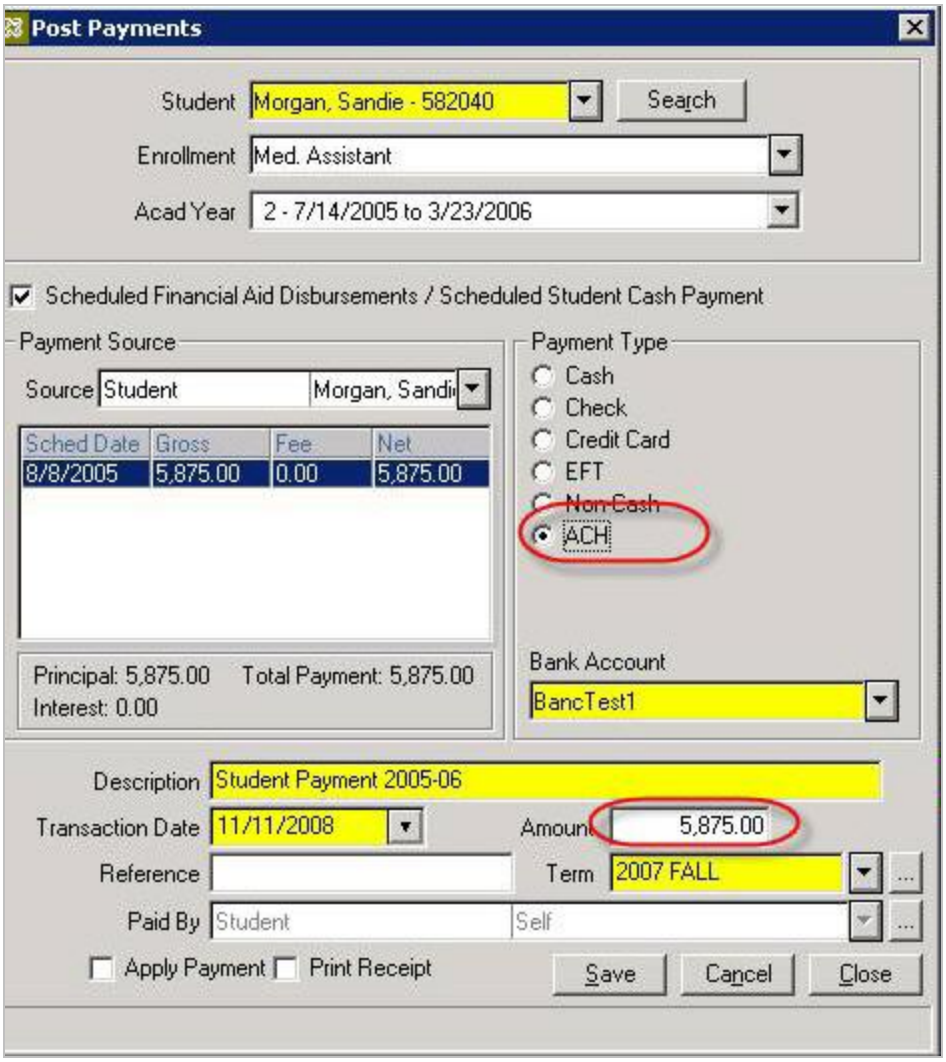


Student Payment - ACH

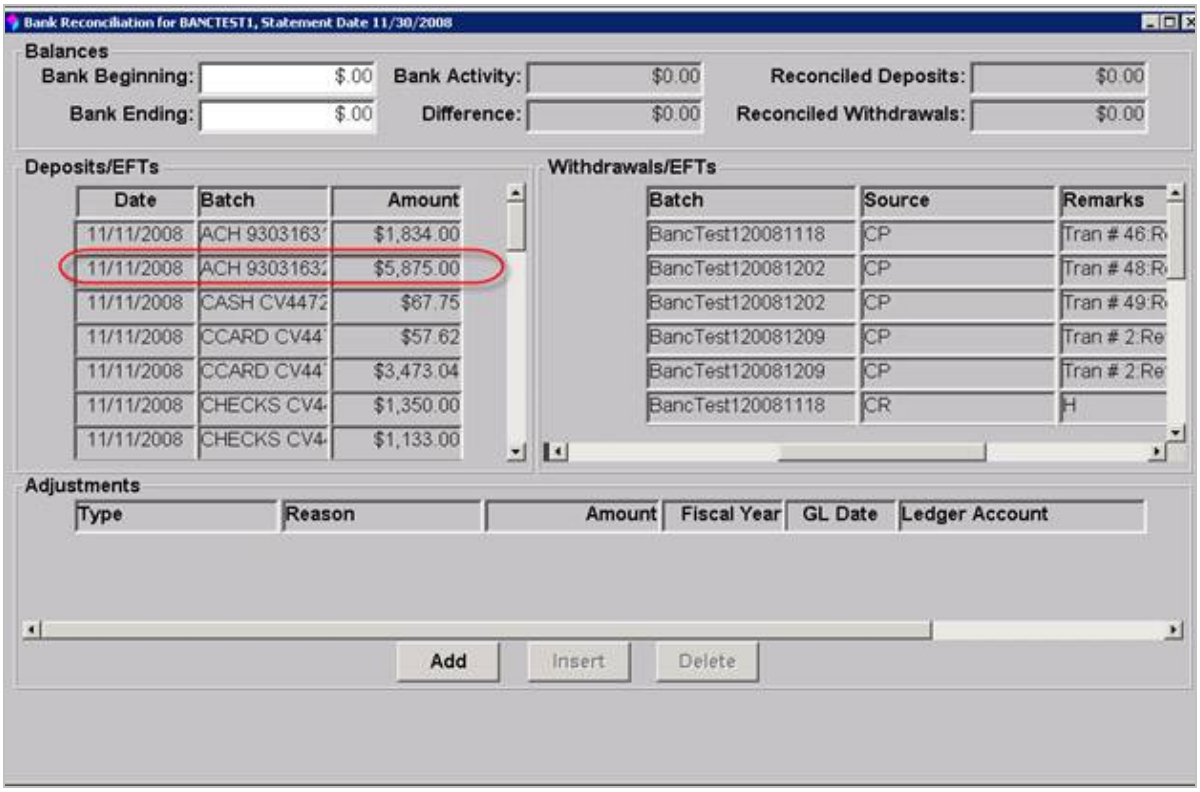


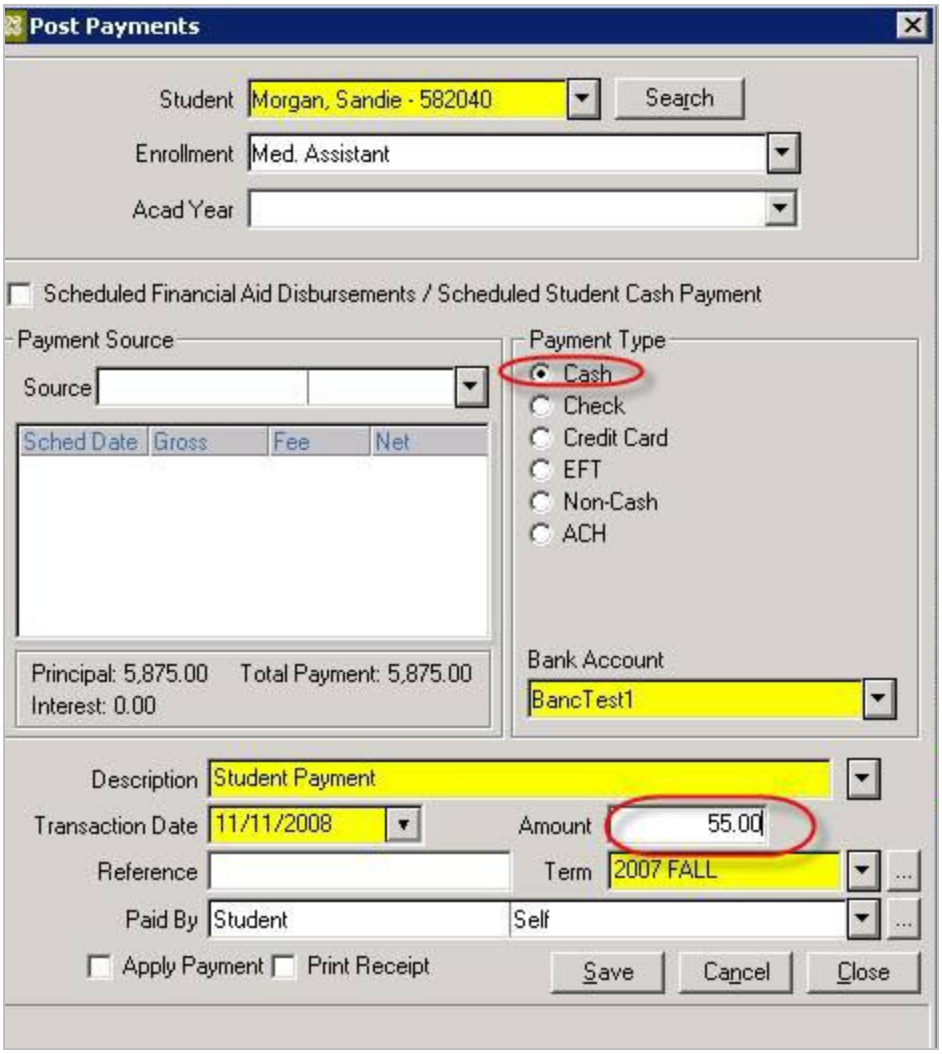
On Bank Reconciliation Form - Deposit 1

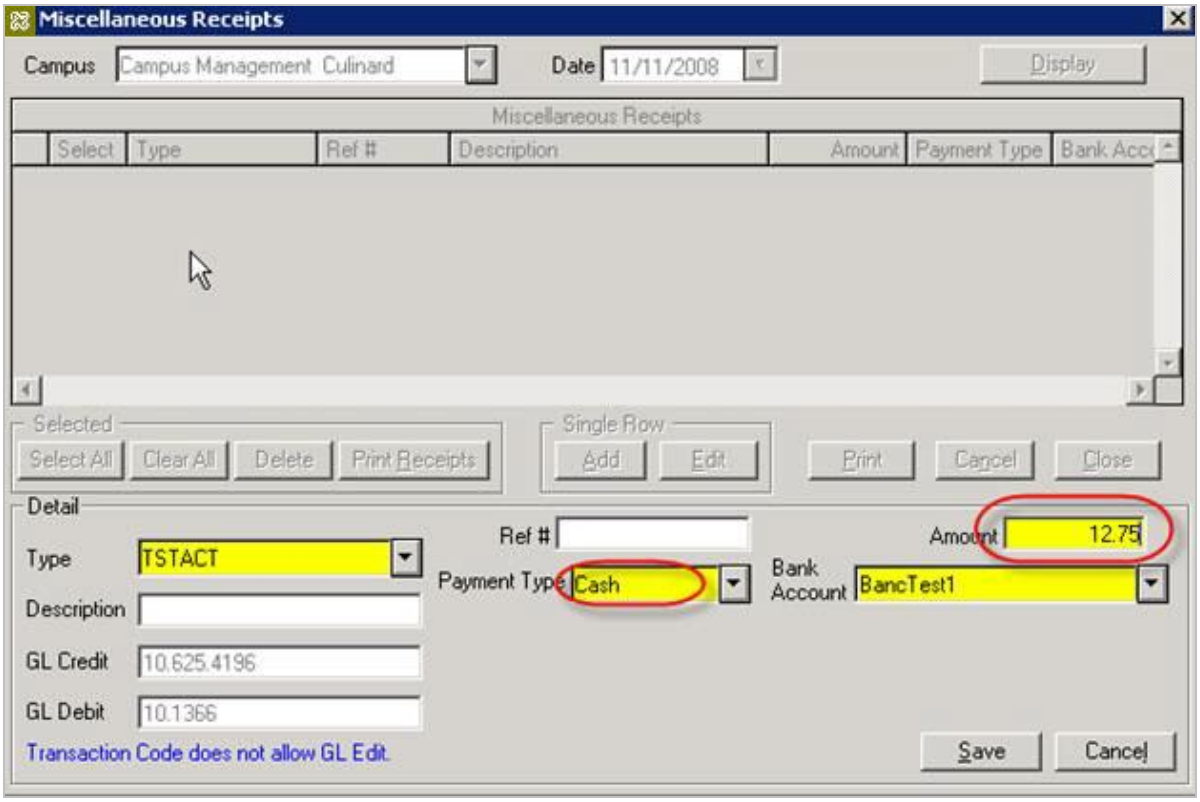



Post Payments
Student
Morgan, Sandie - 582040
Search
Enrollment
Med. Assistant
Acad Year
2 - 7/14/2005 to 3/23/2006
Scheduled Financial Aid Disbursements / Scheduled Student Cash Payment
Payment Source
Source
Student
Morgan, Sandi
Sched Date
Gross
Fee
Net
8/8/2005
5,875.00
0.00
5,875.00
Principal: 5,875.00
Total Payment: 5,875.00
Interest: 0.00
Payment Type
Cash
Check
Credit Card
EFT
Non-Cash
ACH
Bank Account
BancTest1
Description
Student Payment 2005-06
Transaction Date
11/11/2008
Amount
5,875.00
Reference
Term
2007 FALL
Paid By
Student
Self
Apply Payment
Print Receipt
Save
Cancel
Close

On Bank Reconciliation Form - Deposit 2

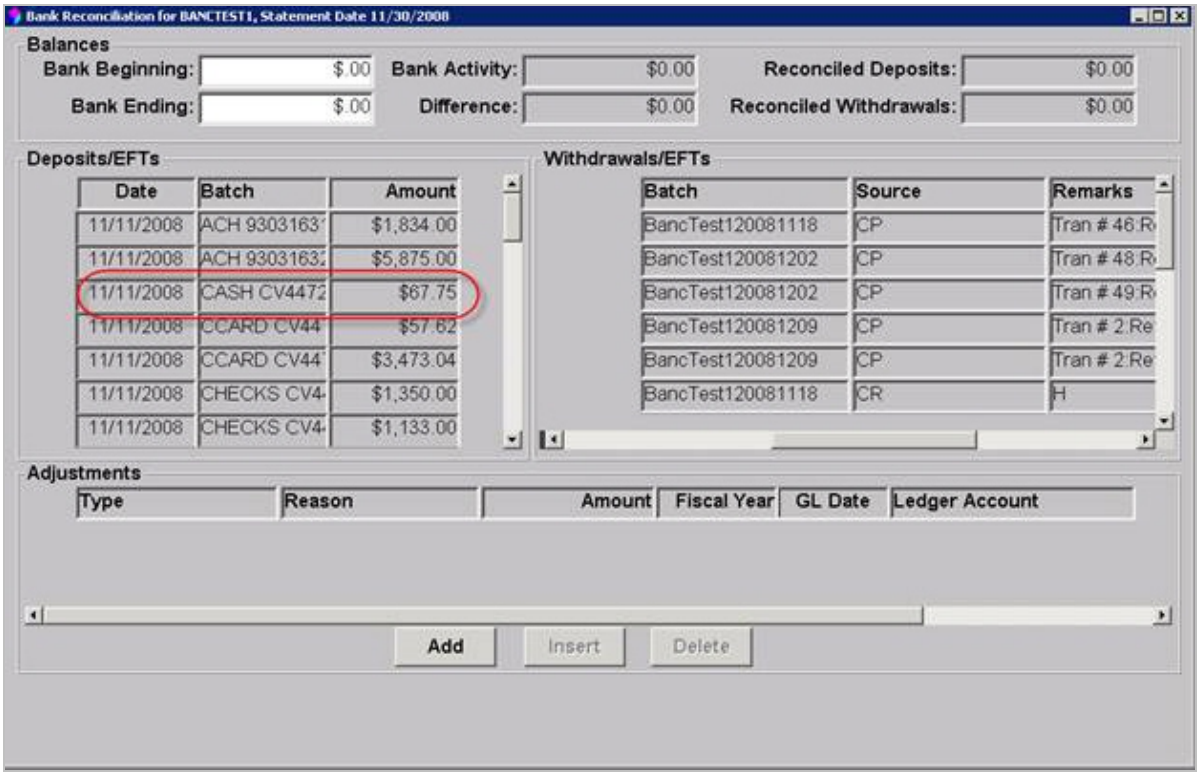


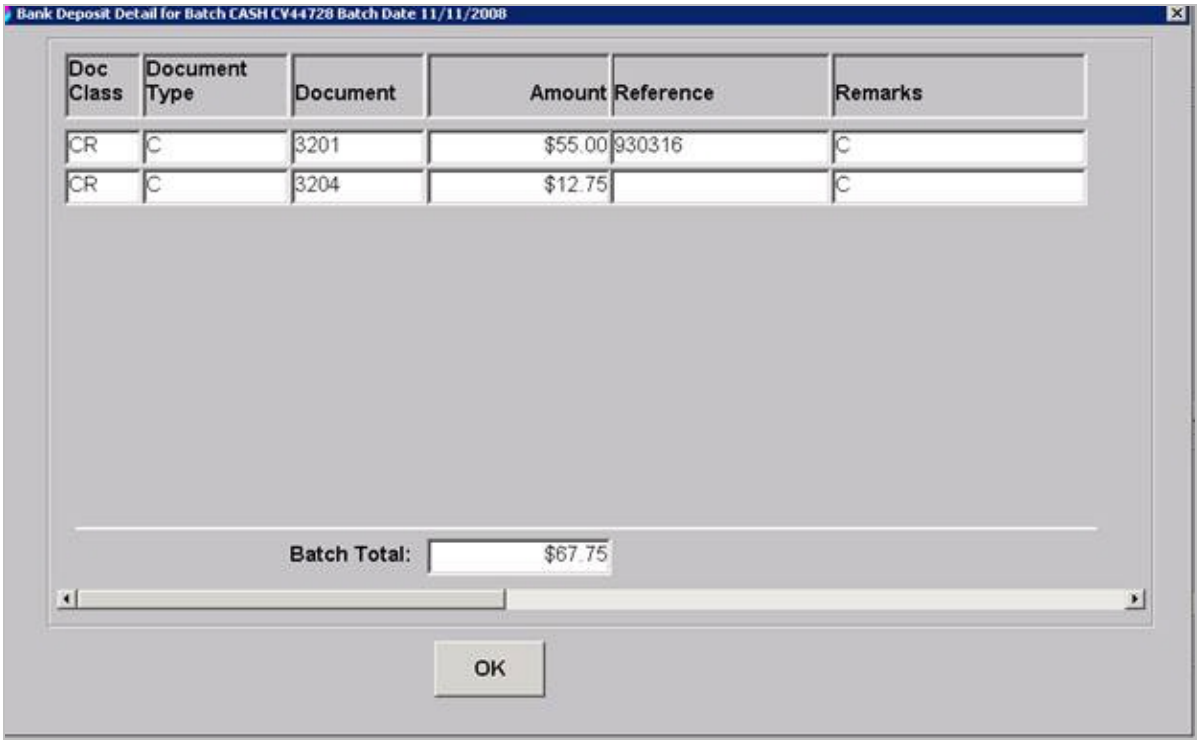

Post Payments
Student
Morgan, Sandie - 582040
Search
Enrollment
Med. Assistant
Acad Year
Scheduled Financial Aid Disbursements / Scheduled Student Cash Payment
Payment Source
Source
Sched Date
Gross
Fee
Net
Principal: 5,875.00
Total Payment: 5,875.00
Interest: 0.00
Payment Type
Cash
Check
Credit Card
EFT
Non-Cash
ACH
Bank Account
BancTest1
Description
Student Payment
Transaction Date
11/11/2008
Amount
55.00
Reference
Term
2007 FALL
Paid By
Student
Self
Apply Payment
Print Receipt
Save
Cancel
Close

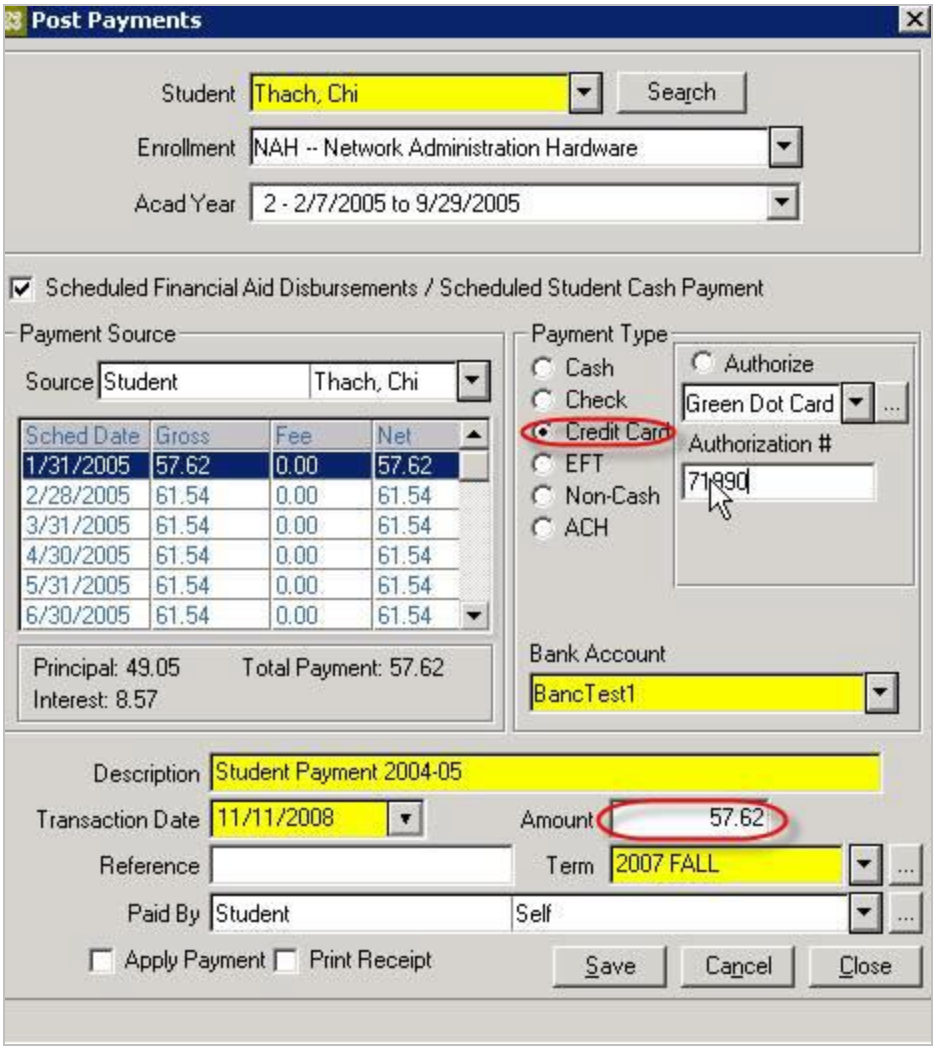


Summation of Cash Accounts

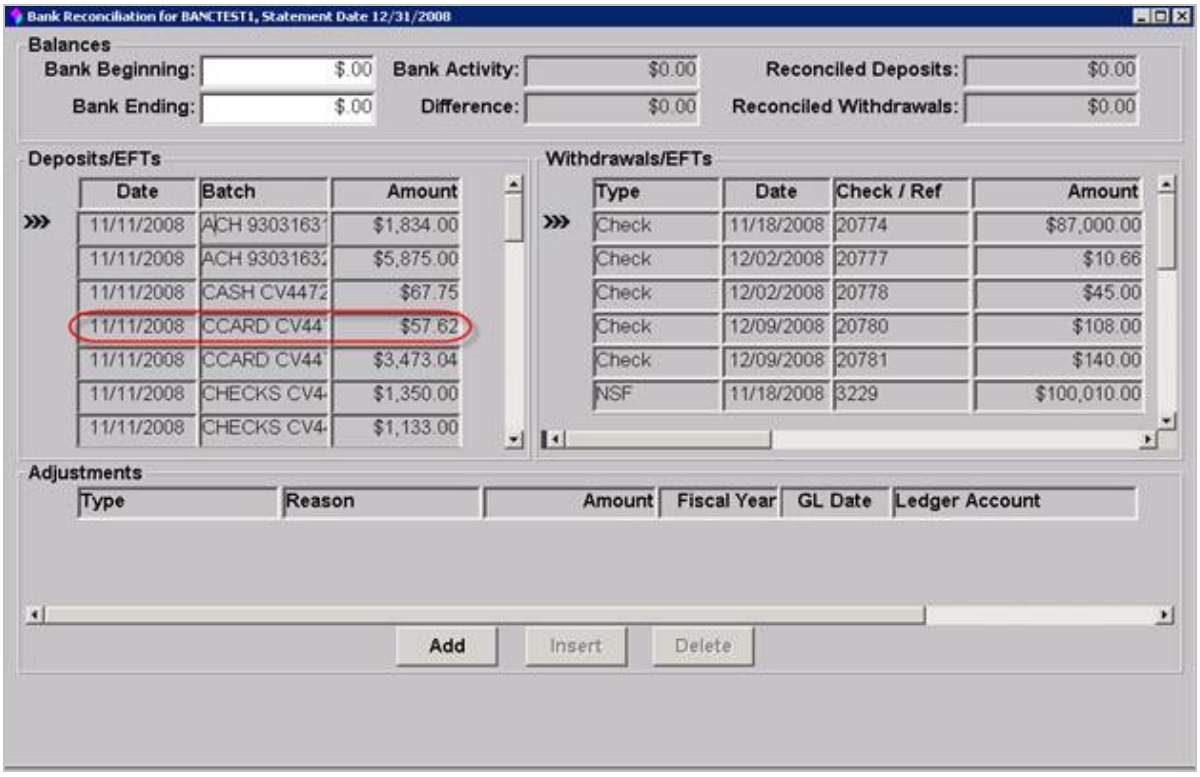
Bank Reconciliation summing both cash amounts on Bank Reconciliation form. Right click to see the details.

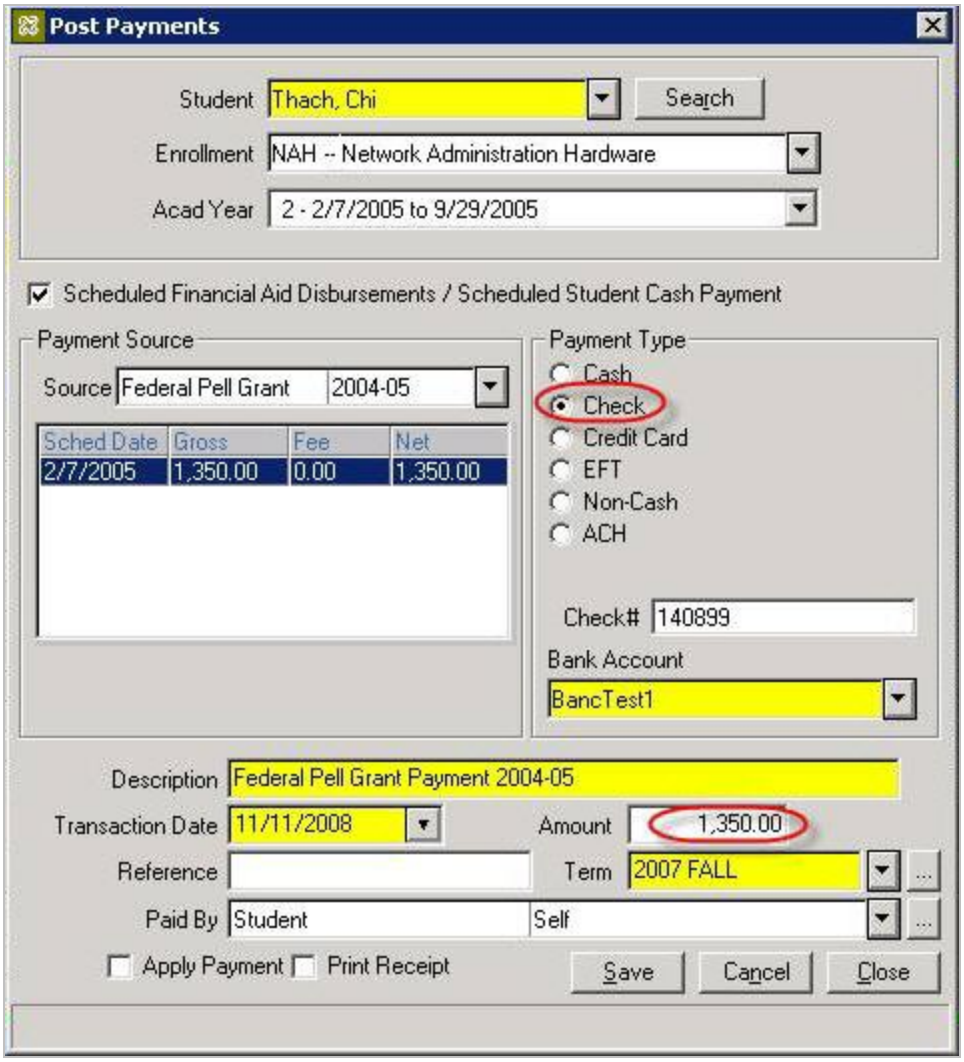



Bank Deposit Detail for Batch CASH CV44728 Batch Date 11/11/2008
Doc Class
Document Type
Document
Amount
Reference
Remarks
CR
C
3201
$55.00
930316
C
CR
C
3204
$12.75
C
Batch Total:
$67.75
OK

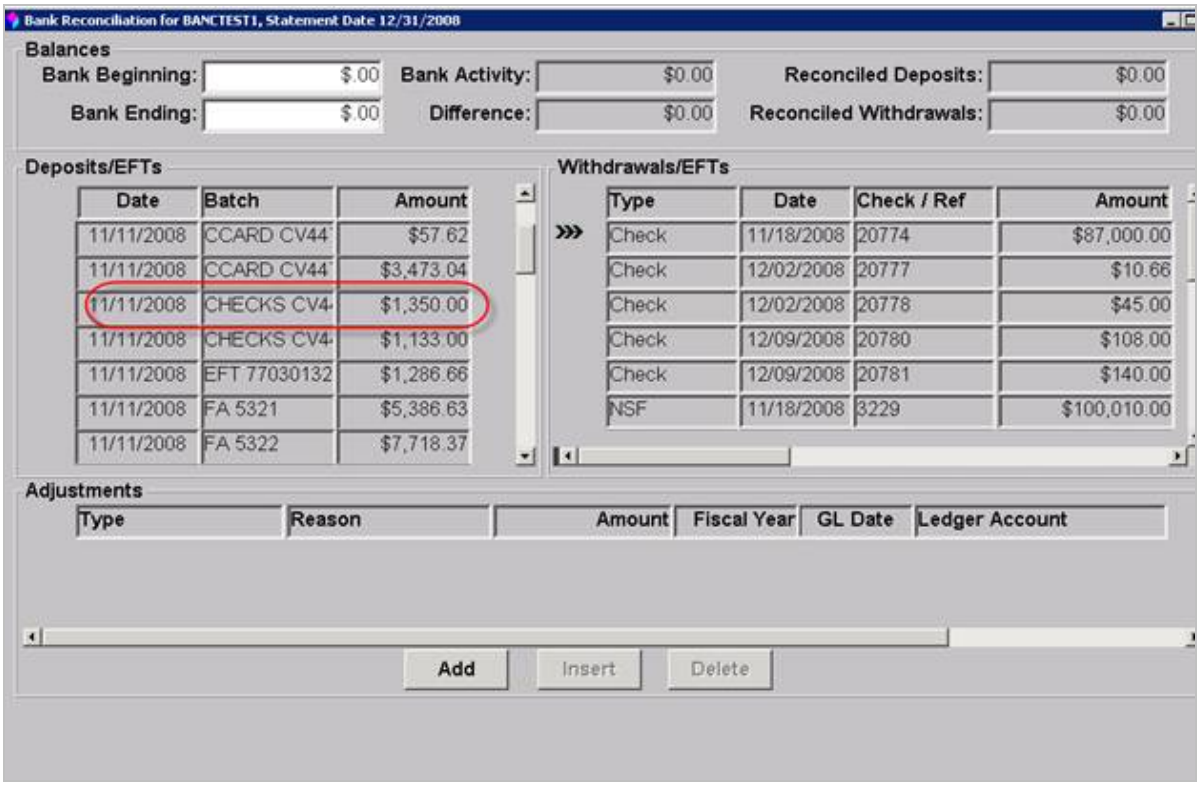


Bank Reconciliation form showing credit card payments (Note that if there were multiple Credit Card payments, the details will be available if you right-click the date on the Deposits section of Bank Reconciliation).


Bank Reconciliation for BANCTEST1, Statement Date 12/31/2008
Balances
Bank Beginning: $.00
Bank Ending: $.00
Bank Activity: $0.00
Difference: $0.00
Reconciled Deposits: $0.00
Reconciled Withdrawals: $0.00
Deposits/EFTs
Date Batch Amount
11/11/2008 ACH 9303163 $1,834.00
11/11/2008 ACH 9303163 $5,875.00
11/11/2008 CASH CV4472 $67.75
11/11/2008 CCARD CV44 $57.62
11/11/2008 CCARD CV44 $3,473.04
11/11/2008 CHECKS CV4 $1,350.00
11/11/2008 CHECKS CV4 $1,133.00
Withdrawals/EFTs
Type Date Check / Ref Amount
Check 11/18/2008 20774 $87,000.00
Check 12/02/2008 20777 $10.66
Check 12/02/2008 20778 $45.00
Check 12/09/2008 20780 $108.00
Check 12/09/2008 20781 $140.00
NSF 11/18/2008 3229 $100,010.00
Adjustments
Type Reason Amount Fiscal Year GL Date Ledger Account
Add
Insert
Delete

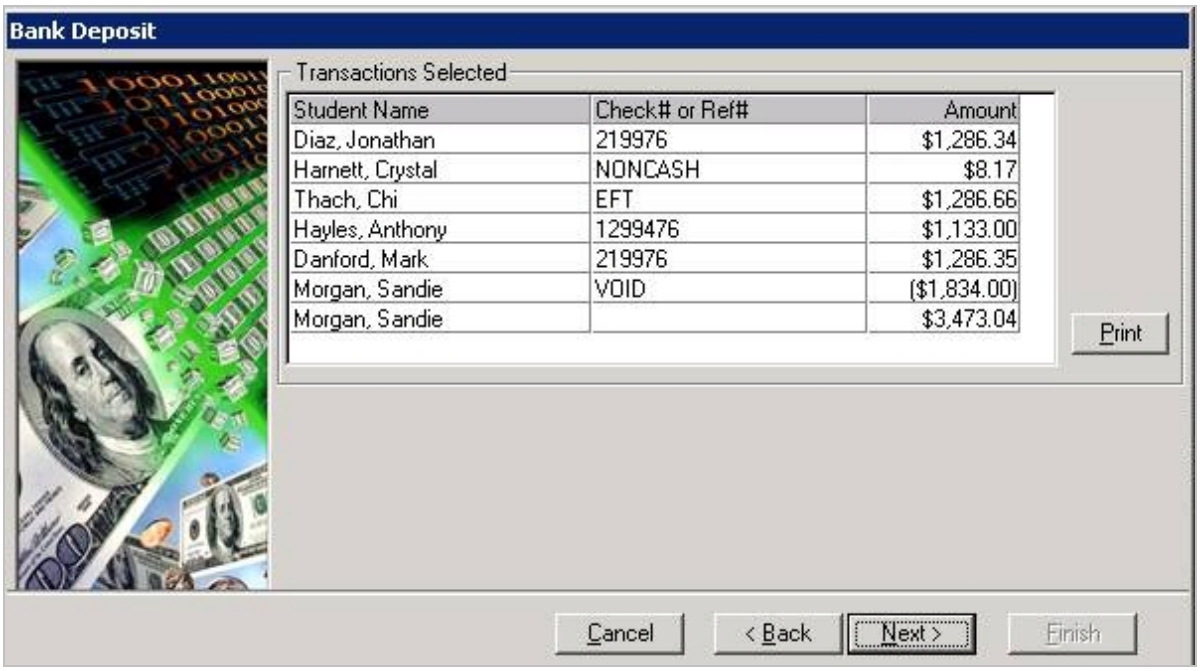


Bank Reconciliation form showing Checks. Note that if there were multiple check payments, the details will be available if you right-click the date on the Deposits section of Bank Reconciliation.



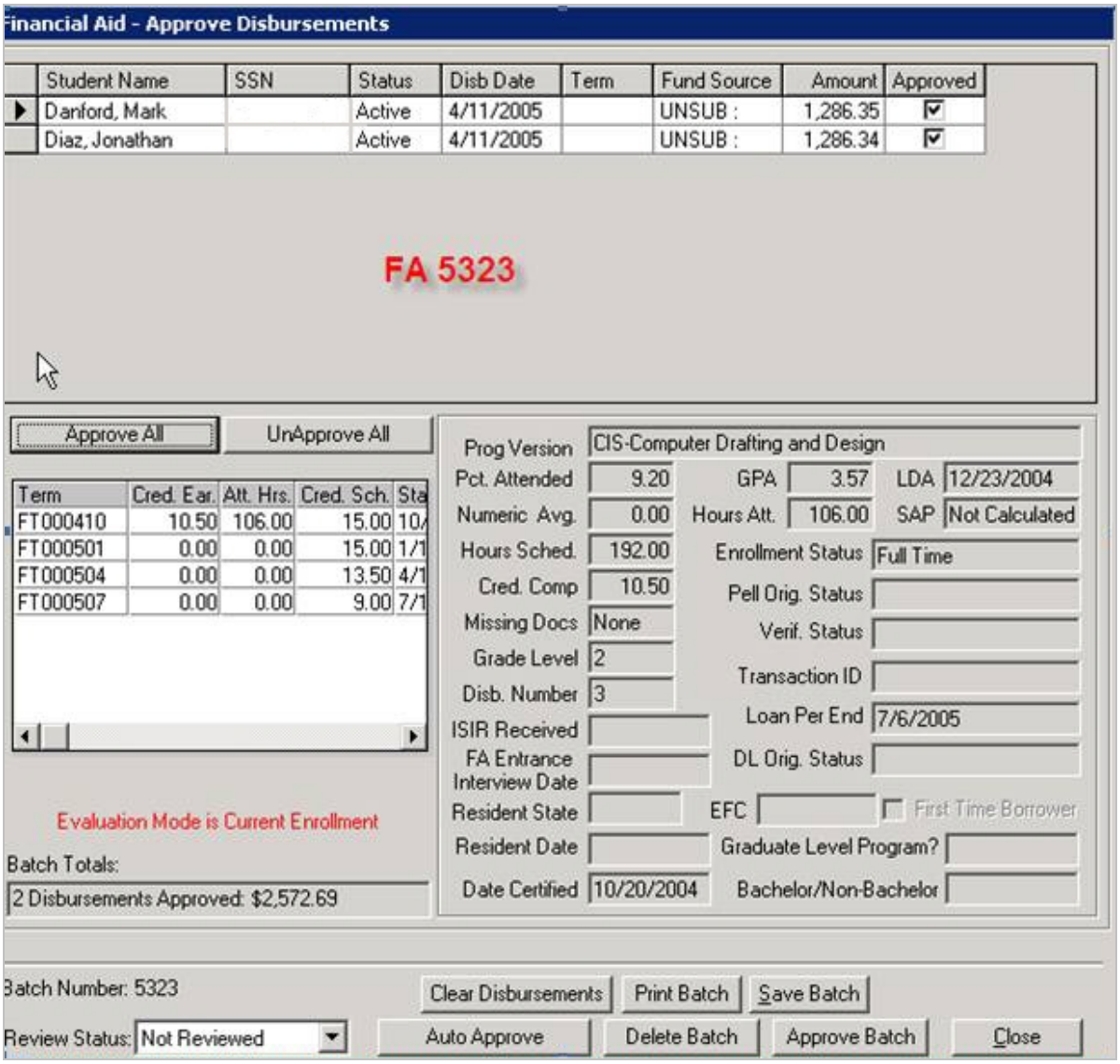
Deposits for CV44729

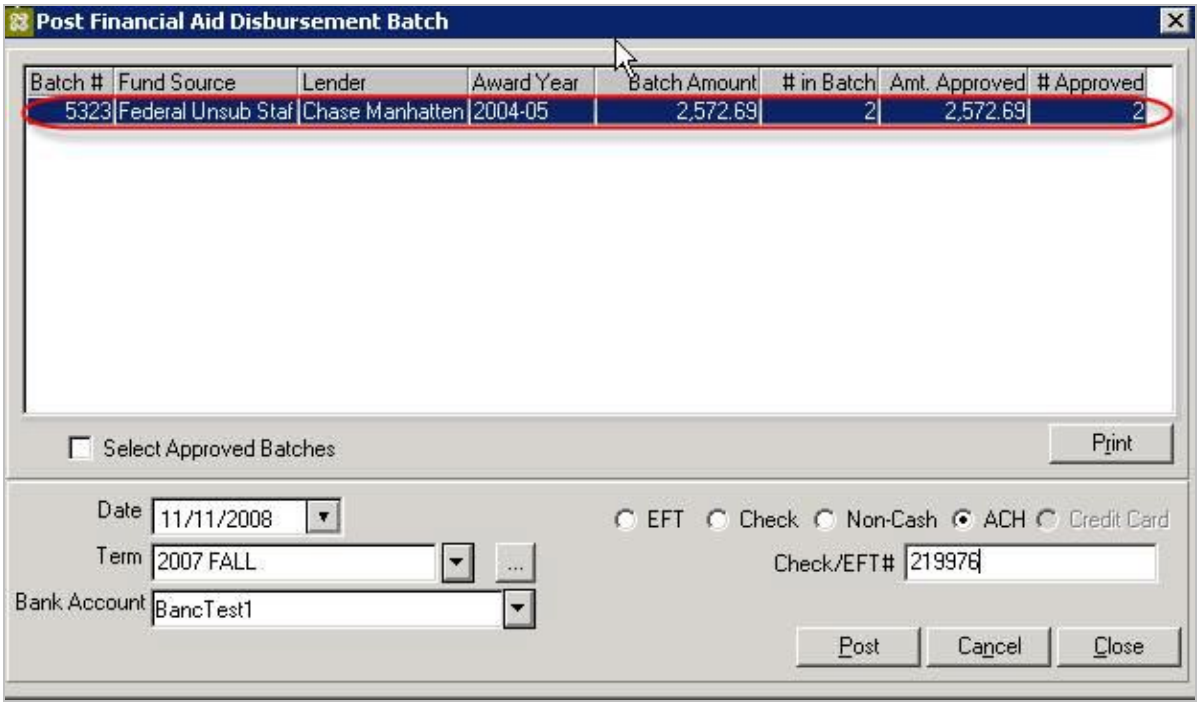
Bank Deposit Wizard



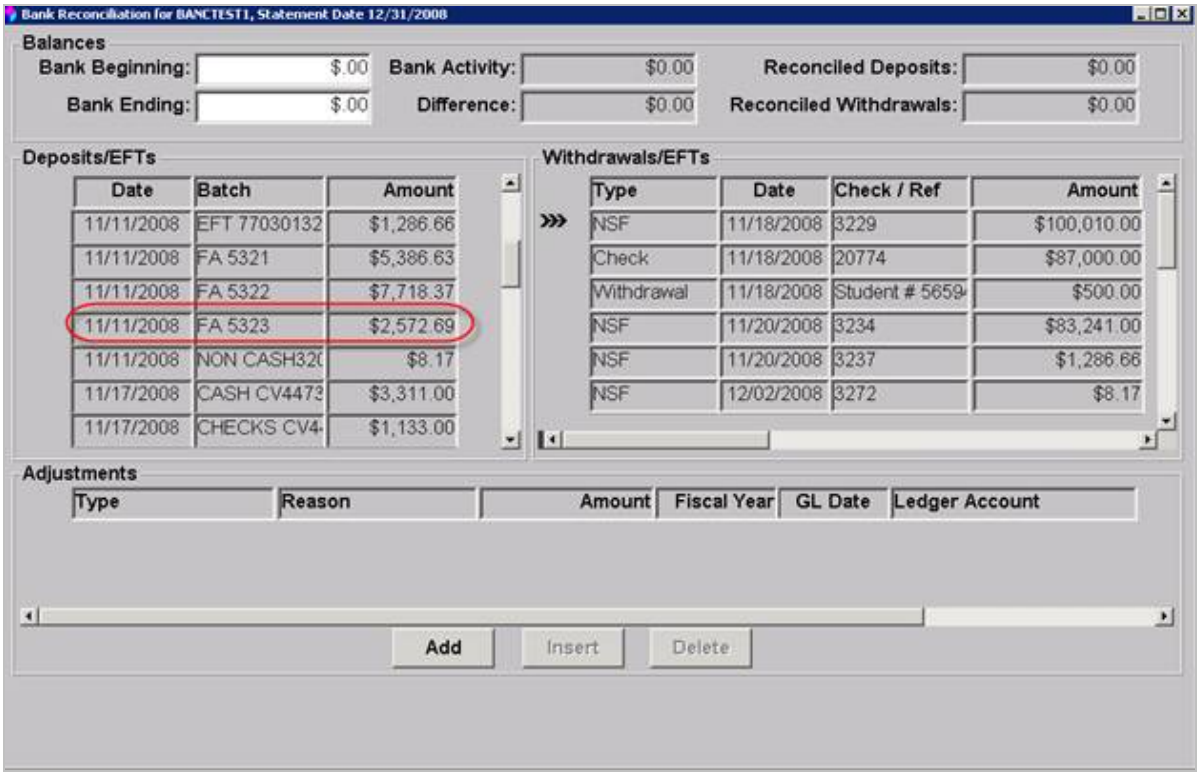
Summary of Transactions for CV 44729

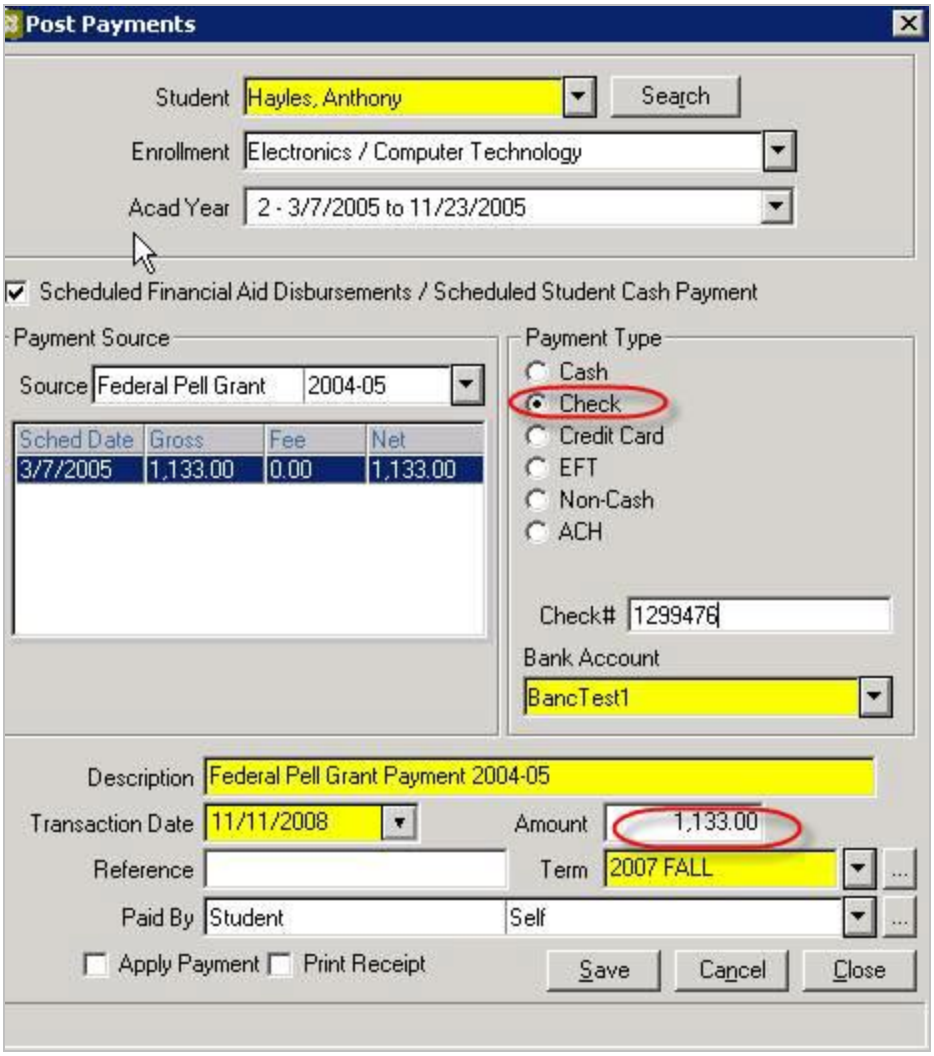
Payment description	Payment Type	Amount
1. Financial Aid Disbursement - 2 Students	Financial Aid Disbursement ACH	2,572.69
2. Student Pell Grant payment	Check	1,133.00
3. Federal Parent Loan Student payment	Credit Card	3,473.04
4. Student payment	Non Cash	8.17
5. Voided prior Student payment	ACH	(1,834.00)
6. Student payment	EFT	1,286.66
Total Deposit		6,639.56



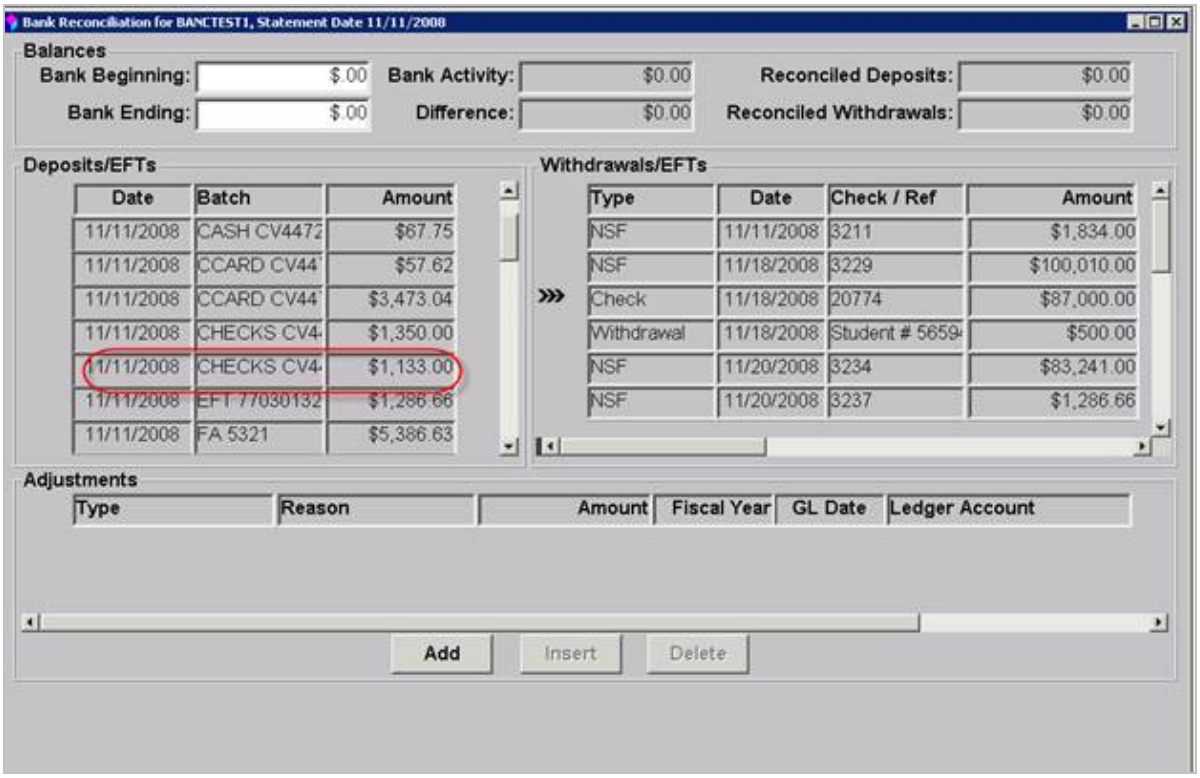


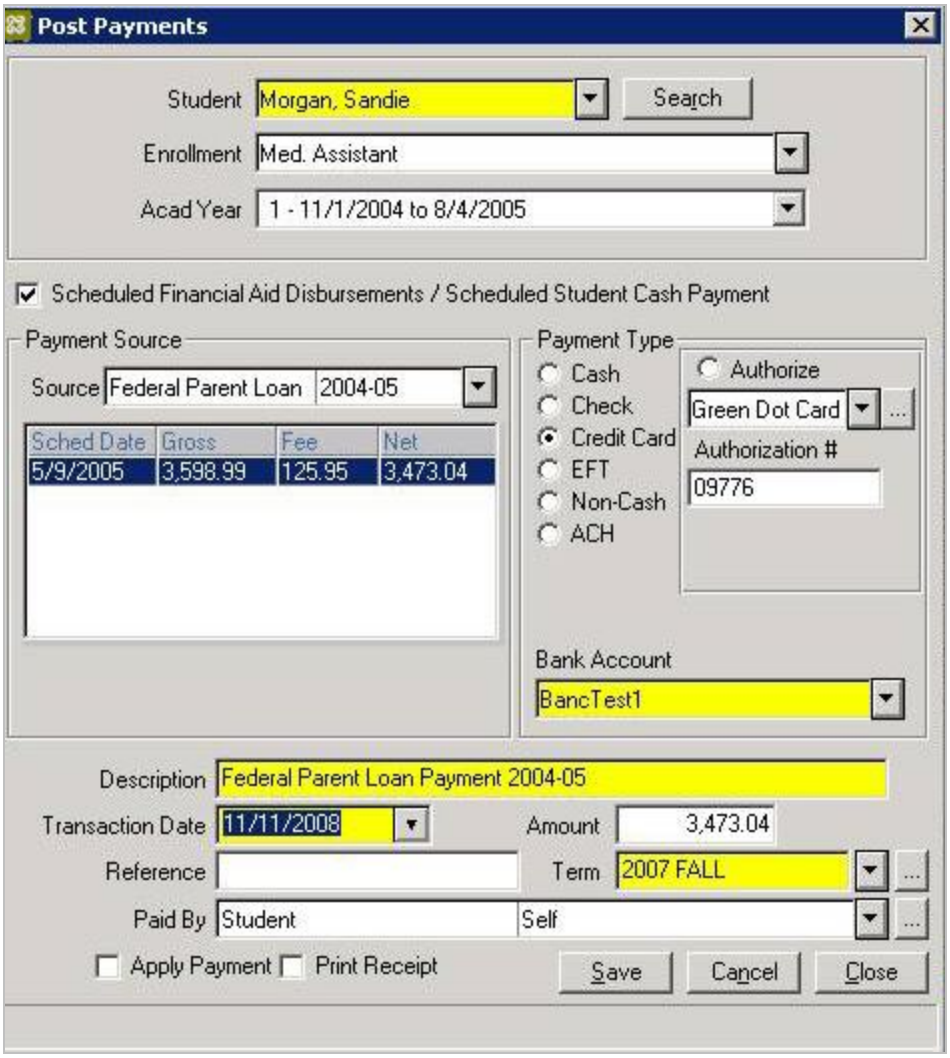
On the Bank Reconciliation form.



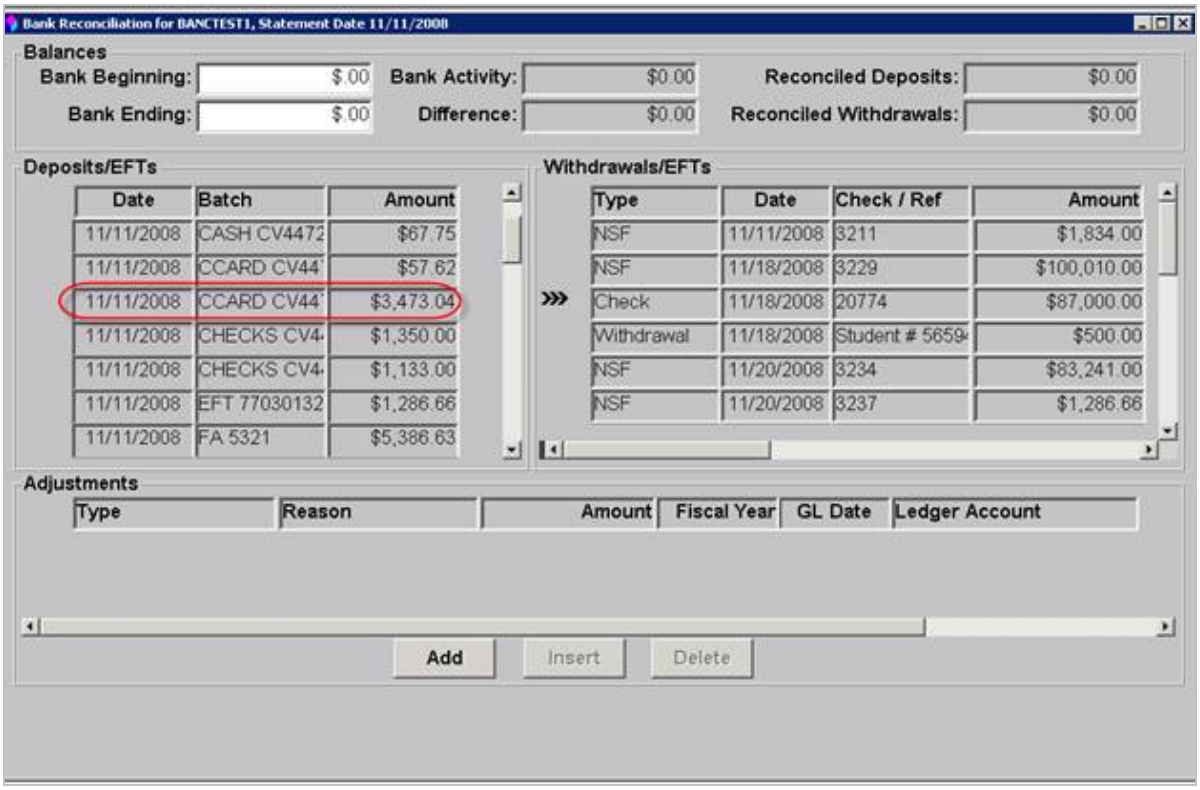


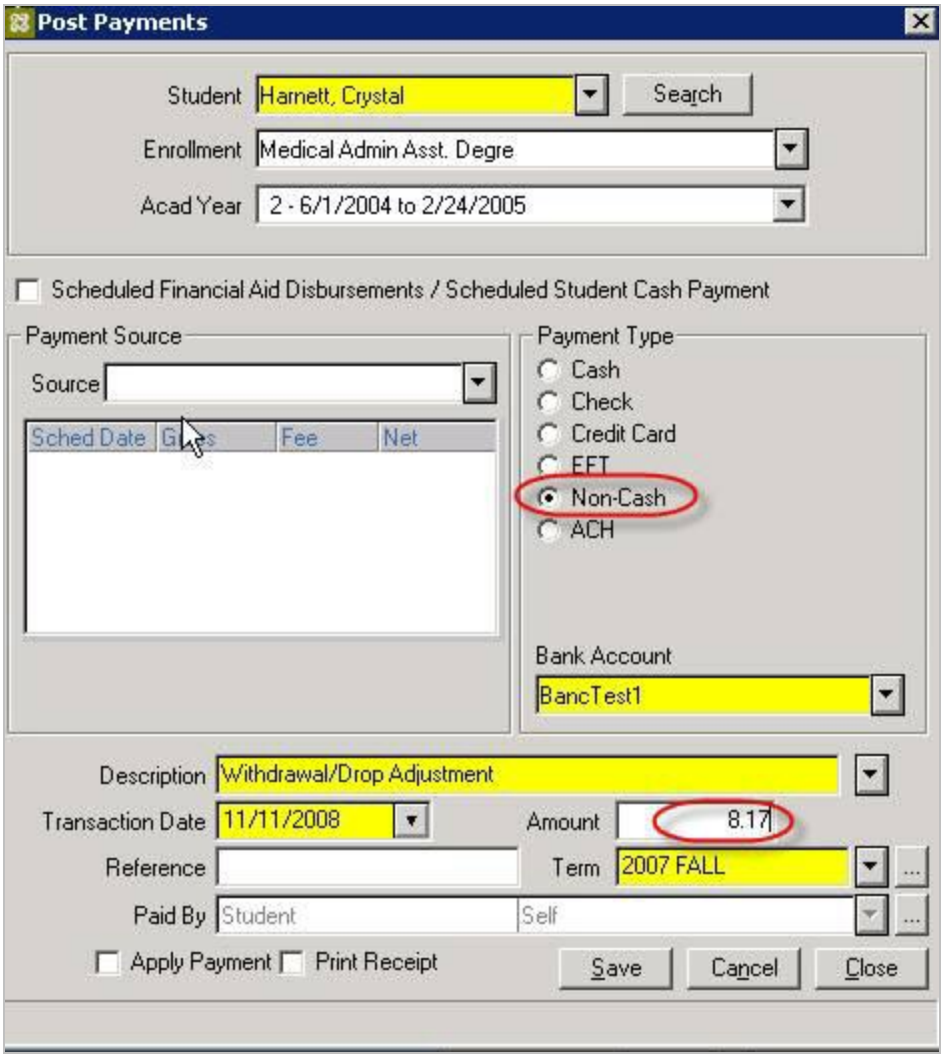
On the Bank Reconciliation form.


Bank Reconciliation for BANCTEST1, Statement Date 11/11/2008
Balances
Bank Beginning: $.00
Bank Ending: $.00
Bank Activity: $0.00
Difference: $0.00
Reconciled Deposits: $0.00
Reconciled Withdrawals: $0.00
Deposits/EFTs
Date Batch Amount
11/11/2008 CASH CV4472 $67.75
11/11/2008 CCARD CV44 $57.62
11/11/2008 CCARD CV44 $3,473.04
11/11/2008 CHECKS CV4 $1,350.00
11/11/2008 CHECKS CV4 $1,133.00
11/11/2008 EFT 77030132 $1,286.66
11/11/2008 FA 5321 $5,386.63
Withdrawals/EFTs
Type Date Check / Ref Amount
NSF 11/11/2008 3211 $1,834.00
NSF 11/18/2008 3229 $100,010.00
Check 11/18/2008 20774 $87,000.00
Withdrawal 11/18/2008 Student # 5659 $500.00
NSF 11/20/2008 3234 $83,241.00
NSF 11/20/2008 3237 $1,286.66
Adjustments
Type Reason Amount Fiscal Year GL Date Ledger Account
Add
Insert
Delete

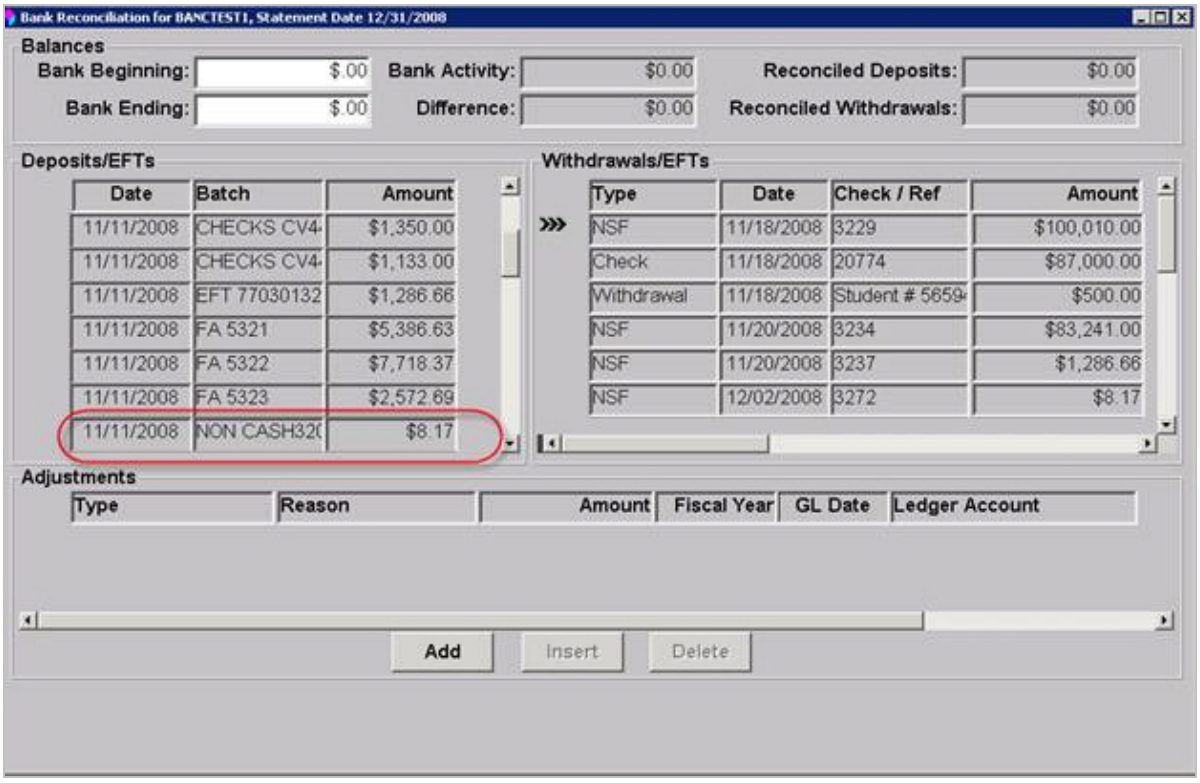


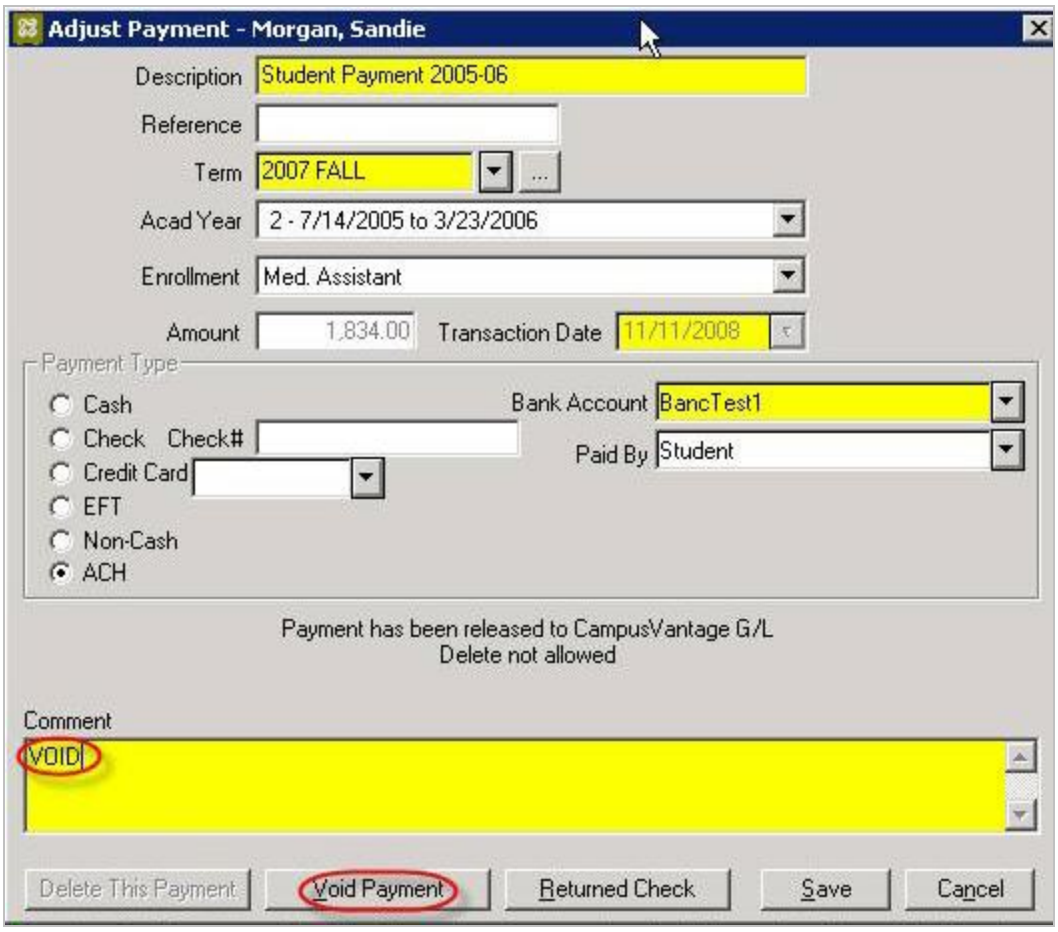
On Bank Reconciliation form.


Bank Reconciliation for BANCTEST1, Statement Date 11/11/2008
Balances
Bank Beginning: $.00
Bank Ending: $.00
Bank Activity: $0.00
Difference: $0.00
Reconciled Deposits: $0.00
Reconciled Withdrawals: $0.00
Deposits/EFTs
Date Batch Amount
11/11/2008 CASH CV4472 $67.75
11/11/2008 CCARD CV44 $57.62
11/11/2008 CCARD CV44 $3,473.04
11/11/2008 CHECKS CV4 $1,350.00
11/11/2008 CHECKS CV4 $1,133.00
11/11/2008 EFT 77030132 $1,286.66
11/11/2008 FA 5321 $5,386.63
Withdrawals/EFTs
Type Date Check / Ref Amount
NSF 11/11/2008 3211 $1,834.00
NSF 11/18/2008 3229 $100,010.00
Check 11/18/2008 20774 $87,000.00
Withdrawal 11/18/2008 Student # 5659 $500.00
NSF 11/20/2008 3234 $83,241.00
NSF 11/20/2008 3237 $1,286.66
Adjustments
Type Reason Amount Fiscal Year GL Date Ledger Account
Add
Insert
Delete

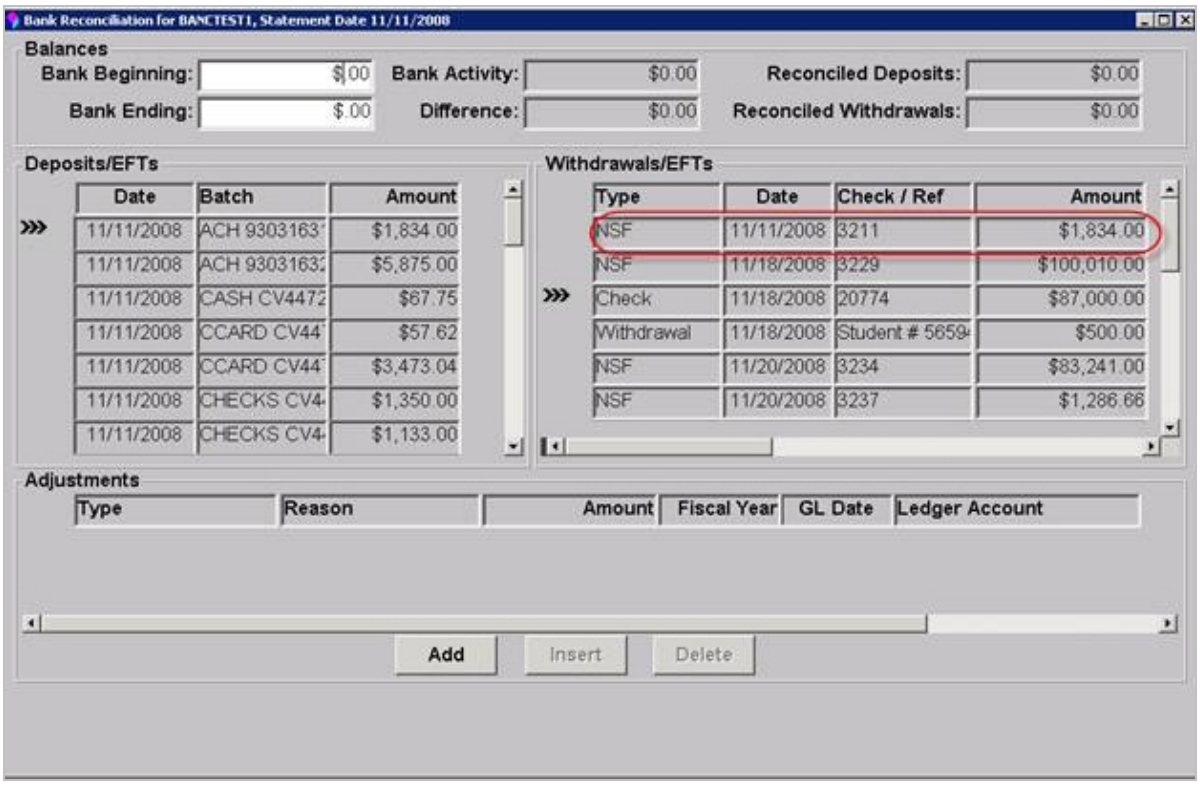


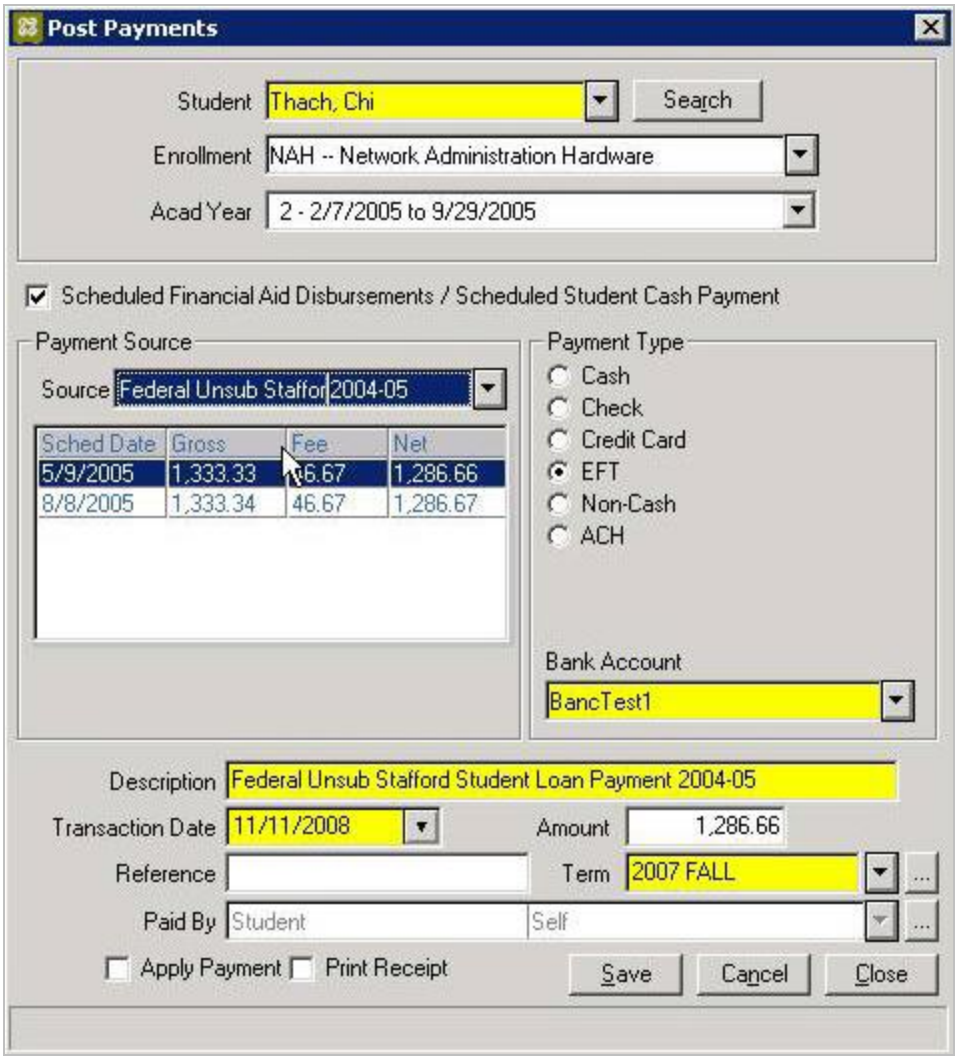
On the Bank Reconciliation form.


Bank Reconciliation for BANCTEST1, Statement Date 12/31/2008
Balances
Bank Beginning: $.00
Bank Ending: $.00
Bank Activity: $0.00
Difference: $0.00
Reconciled Deposits: $0.00
Reconciled Withdrawals: $0.00
Deposits/EFTs
Date Batch Amount
11/11/2008 CHECKS CV4- $1,350.00
11/11/2008 CHECKS CV4- $1,133.00
11/11/2008 EFT 77030132 $1,286.66
11/11/2008 FA 5321 $5,386.63
11/11/2008 FA 5322 $7,718.37
11/11/2008 FA 5323 $2,572.69
11/11/2008 NON CASH32($8.17
Withdrawals/EFTs
Type Date Check / Ref Amount
NSF 11/18/2008 3229 $100,010.00
Check 11/18/2008 20774 $87,000.00
Withdrawal 11/18/2008 Student # 5659- $500.00
NSF 11/20/2008 3234 $83,241.00
NSF 11/20/2008 3237 $1,286.66
NSF 12/02/2008 3272 $8.17
Adjustments
Type Reason Amount Fiscal Year GL Date Ledger Account
Add
Insert
Delete

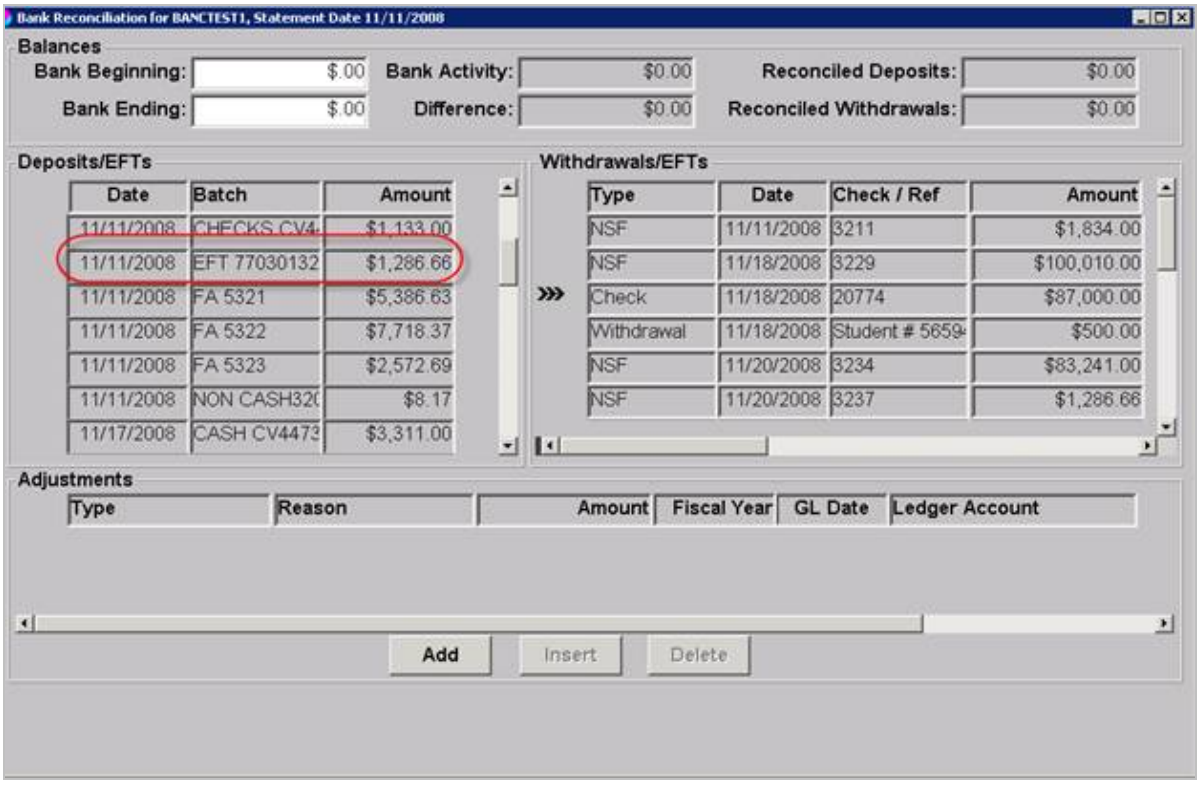

Adjust Payment - Morgan, Sandie
Description Student Payment 2005-06
Reference
Term 2007 FALL
Acad Year 2 - 7/14/2005 to 3/23/2006
Enrollment Med. Assistant
Amount 1,834.00
Transaction Date 11/11/2008
Payment Type
Cash
Check Check#
Credit Card
EFT
Non-Cash
ACH
Bank Account BancTest1
Paid By Student
Payment has been released to CampusVantage G/L
Delete not allowed
Comment
VOID
Delete This Payment
Void Payment
Returned Check
Save
Cancel

On the Bank Reconciliation form.





On the Bank Reconciliation form.


Bank Reconciliation for BANCTEST1, Statement Date 11/11/2008
Balances
Bank Beginning: $.00
Bank Ending: $.00
Bank Activity: $0.00
Difference: $0.00
Reconciled Deposits: $0.00
Reconciled Withdrawals: $0.00
Deposits/EFTs
Date Batch Amount
11/11/2008 CHECKS CV4 $1,133.00
11/11/2008 EFT 77030132 $1,286.66
11/11/2008 FA 5321 $5,386.63
11/11/2008 FA 5322 $7,718.37
11/11/2008 FA 5323 $2,572.69
11/11/2008 NON CASH32($8.17
11/17/2008 CASH CV4473 $3,311.00
Withdrawals/EFTs
Type Date Check / Ref Amount
NSF 11/11/2008 3211 $1,834.00
NSF 11/18/2008 3229 $100,010.00
Check 11/18/2008 20774 $87,000.00
Withdrawal 11/18/2008 Student # 5659 $500.00
NSF 11/20/2008 3234 $83,241.00
NSF 11/20/2008 3237 $1,286.66
Adjustments
Type Reason Amount Fiscal Year GL Date Ledger Account
Add
Insert
Delete

Release to Integrated Accounting System

For clients who have selected CampusVue Finance, HR & Payroll or CampusNexus Finance, HR & Payroll as their accounting system, transactions such as miscellaneous receipts, student deposits, Student Ledger Card and Subsidiary Ledger entries and adjustments, Stipend and Refund Checks, Bank Deposits, and Revenue Recognition continue to be entered in CampusNexus Student, but will be sent to the integrated accounting system through the Web services to create journal entries in the integrated accounting system.

The same **Release to General Ledger** wizard for other accounting systems is used; however, some forms and functionality are modified for CampusVue Finance, HR & Payroll and CampusNexus Finance, HR & Payroll requirements.

- If using CampusVue Finance, HR & Payroll, transactions entered in CampusNexus Student and affecting the general ledger create multiple journal entries based on Journal Entry Groups in CampusNexus Student, by period, and by specific function. The following is a list of the journal entry groups that will be processed:
    - Revenue Recognition Journal Entry Groups
    - Bank Deposit Journal Entry Groups
    - Miscellaneous Receipts Journal Entry Groups
    - Stipend and Refund Check Printing
    - Ledger Cards
    - Subsidiary Transaction

- If using CampusNexus Finance, HR & Payroll, transactions entered in CampusNexus Student and affecting the general ledgers create multiple journal entries based on release date, time, journal entry type, and campus in CampusNexus Student. The following is a list of the journal entry types that will be processed:
    - Miscellaneous Receipts
    - Financial Aid Disbursements
    - Stipends
    - Refunds
    - Stipend and Refund Check Printing
    - Student Ledger Transactions
    - Subsidiary Transactions

  During release to general ledger, CampusNexus Student sends the Payee Type, Payee ID, name, and address for refunds, stipends, and subsidiary refunds to CampusNexus Finance, HR & Payroll. CampusNexus Finance, HR & Payroll uses the Payee information to update the Vendor or creates the Vendor (if not mapped) with the following details:
    - First Name
    - Middle Name
    - Last Name
    - Address Line 1
    - City
    - State
    - Zip Code
    - Payee Type
    - Payee ID

  CampusNexus Finance, HR & Payroll creates refund and stipend transactions using the Vendor sent by CampusNexus Student.

  If a user changes the Payee details in the Student Master after the transaction that uses the Payee is released to the General Ledger, the changes are not reflected in CampusNexus Finance, HR & Payroll until another release to general ledger involving the same Payee is done.

Any transactions that have not been previously released to the General Ledger in the integrated accounting system are gathered for release. Previously released transactions that were not successfully updated within the accounting system may also be gathered for release.

A functional area of a transaction (for example, financial aid, student accounts) dictates how the transaction is grouped into journal entries within the integrated accounting system. For example, transactions from similar functional areas should be grouped into common journal entries, which will make it easier for the users of the accounting system to understand where journal entries originated.

To control the number of journal entries sent to CampusVue Finance, HR & Payroll, the G/L Release Process/Service creates **one** journal entry at a time

- per Journal Entry Group
- per CampusNexus Student functional area
- per fiscal period

Detailed records in the same area that occur during the same fiscal period are combined into one journal entry per Journal Entry Group.

For journal entries sent to CampusNexus Finance, HR & Payroll, the G/L Release Process/Service creates **one** journal entry at a time

- per Campus
- per Journal Entry Type
- per release

Release to Integrated Accounting System Wizard

The Student Accounts - Release to CampusVue Finance, HR & Payroll wizard or Student Accounts - Release to CampusNexus Finance, HR & Payroll wizard can be used to perform the following tasks:

- Release transactions to the accounting system's general ledger
- Review and print batches that are processed
- Review the exception report when errors occur
- View/print GL Distributions (ledger entries)

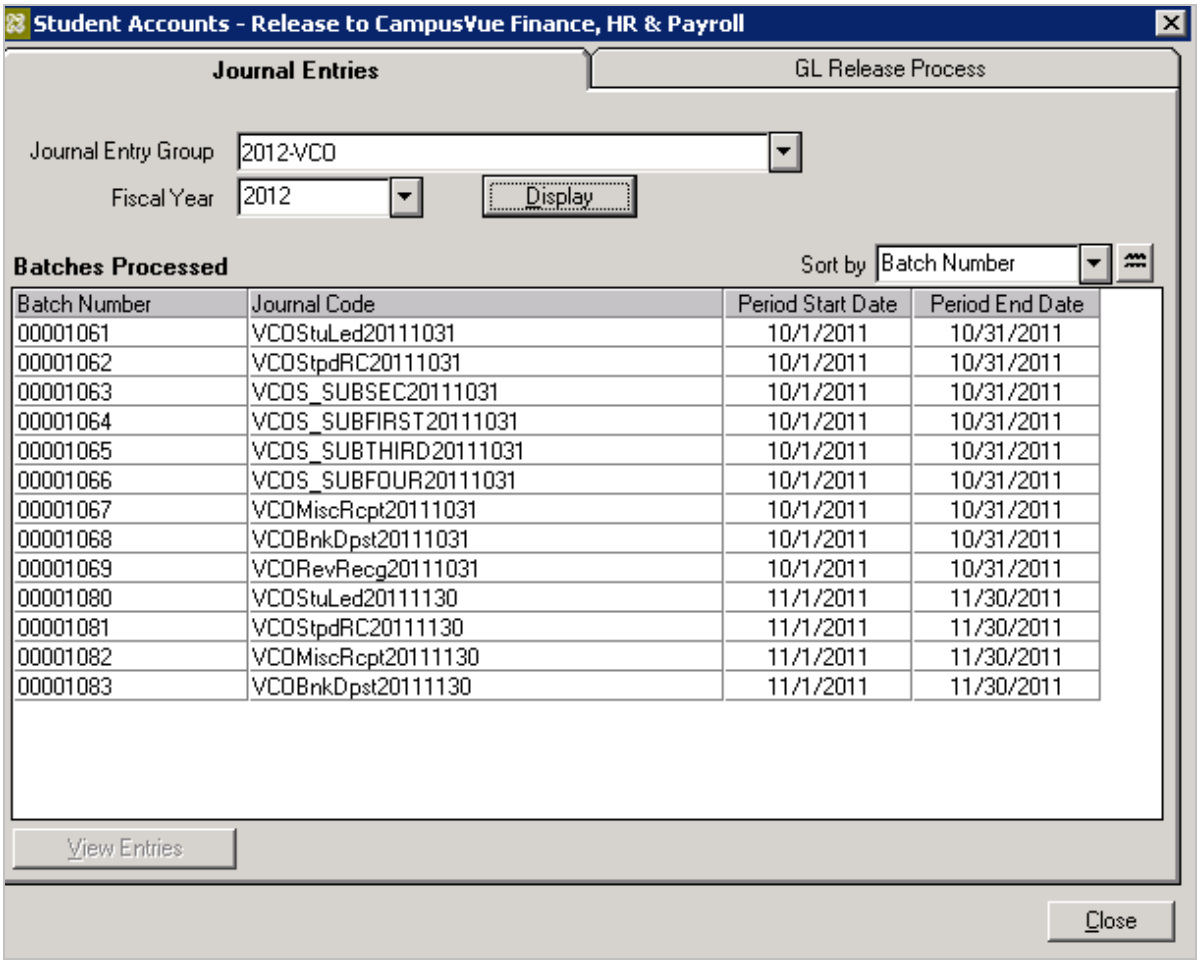
The fiscal period controls the frequency in which a new journal entry is created within the integrated accounting system.

For detailed instructions, refer to the following procedures:

- To release transactions to CampusVue Finance, HR & Payroll
- To release transactions to CampusNexus Finance, HR & Payroll

To release transactions to CampusVue Finance, HR & Payroll:

1. Navigate to **Daily** > **Student Accounts** > **Release to General Ledger**. The Student Accounts - Release to CampusVue Finance, HR & Payroll wizard is displayed. The wizard contains two tabs: Journal Entries and GL Release Process.



Note: If the message *...Automated Processing is currently suspended* is displayed on the bottom on the form, refer to Suspend GL Processing.

2. On the **Journal Entries tab**, you can review and print journal entries within the batch.

   Select specific journal entry groups and fiscal years to gather the desired processed batches or select **All** to produce a list of all journals for a fiscal year, or all journal entries for a journal entry group regardless of fiscal year.

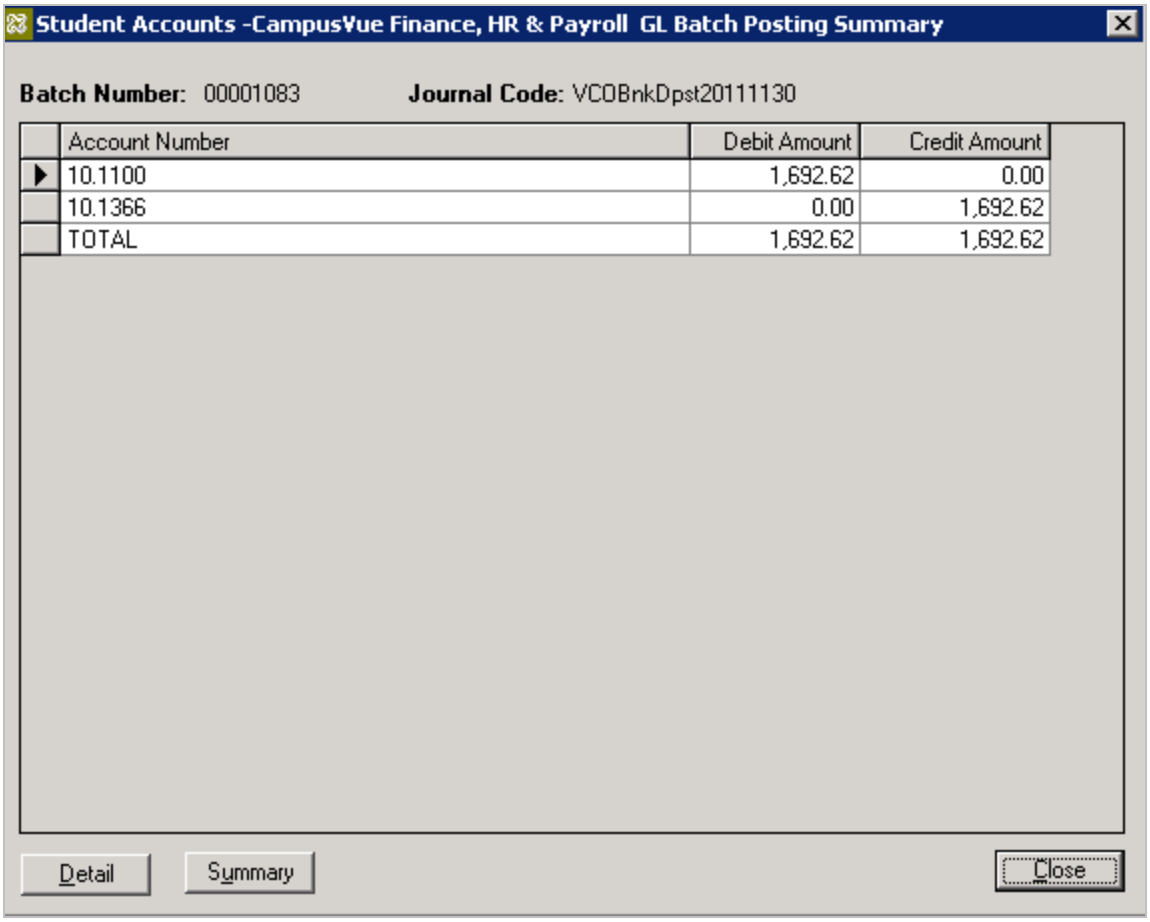
3. Click **Display** to produce a list of the batches processed based on the selections made from the **Journal Entry Group** and **Fiscal Year** lists.

4. In the **Sort by** list, select one of the following options:

   - Batch Number
   - Journal Code
   - Period Start Date
   - Period End Date

   The up arrow next to the **Sort by** list indicates that the list is sorted in ascending order; a down arrow indicates descending order.

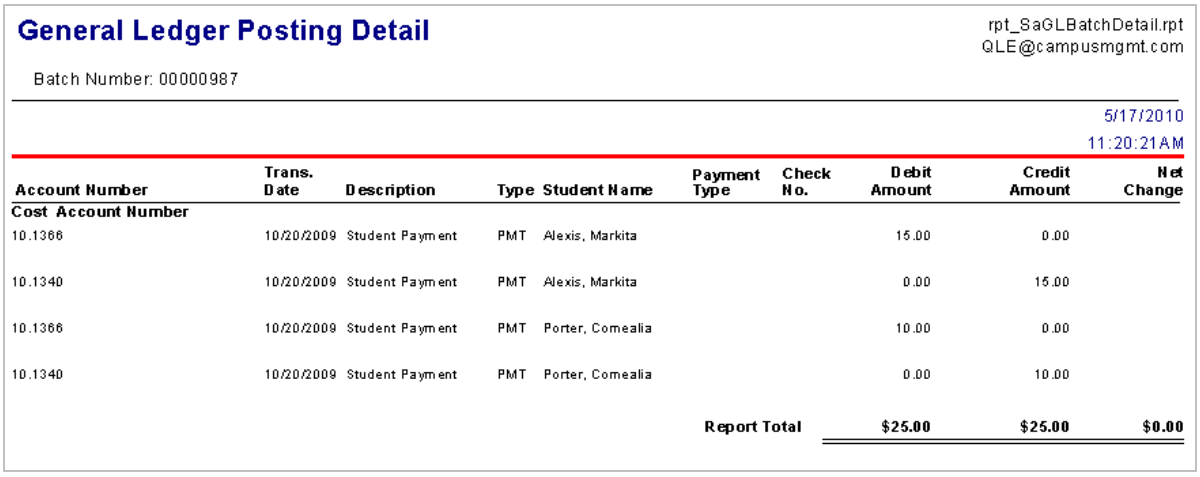
5. Select the batch from the list and click **View Entries**.



6. Click **Detail** to view the Report Selection form for the General Ledger Posting Detail report. Sort the report by campus, batch number, account number, debit amount, credit amount, transaction date, student name, transaction type, cost account, or description.

7. Click Preview to view the report.

   Note: Since journal entry groups can cross multiple campuses, the campus selection tab is disabled on the Report Selection form; however, the report can be sorted by campus.



General Ledger Posting Detail

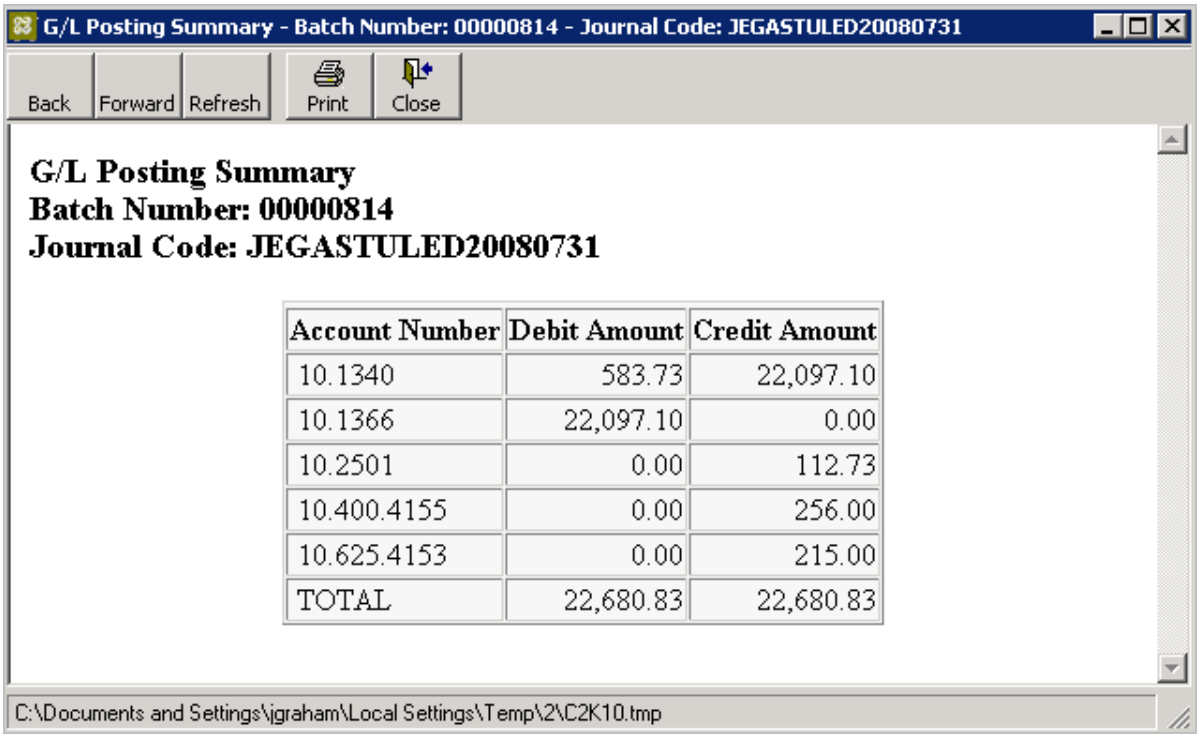
rpt_SaGLBatchDetail.rpt
QLE@campusmgmt.com

Batch Number: 00000987

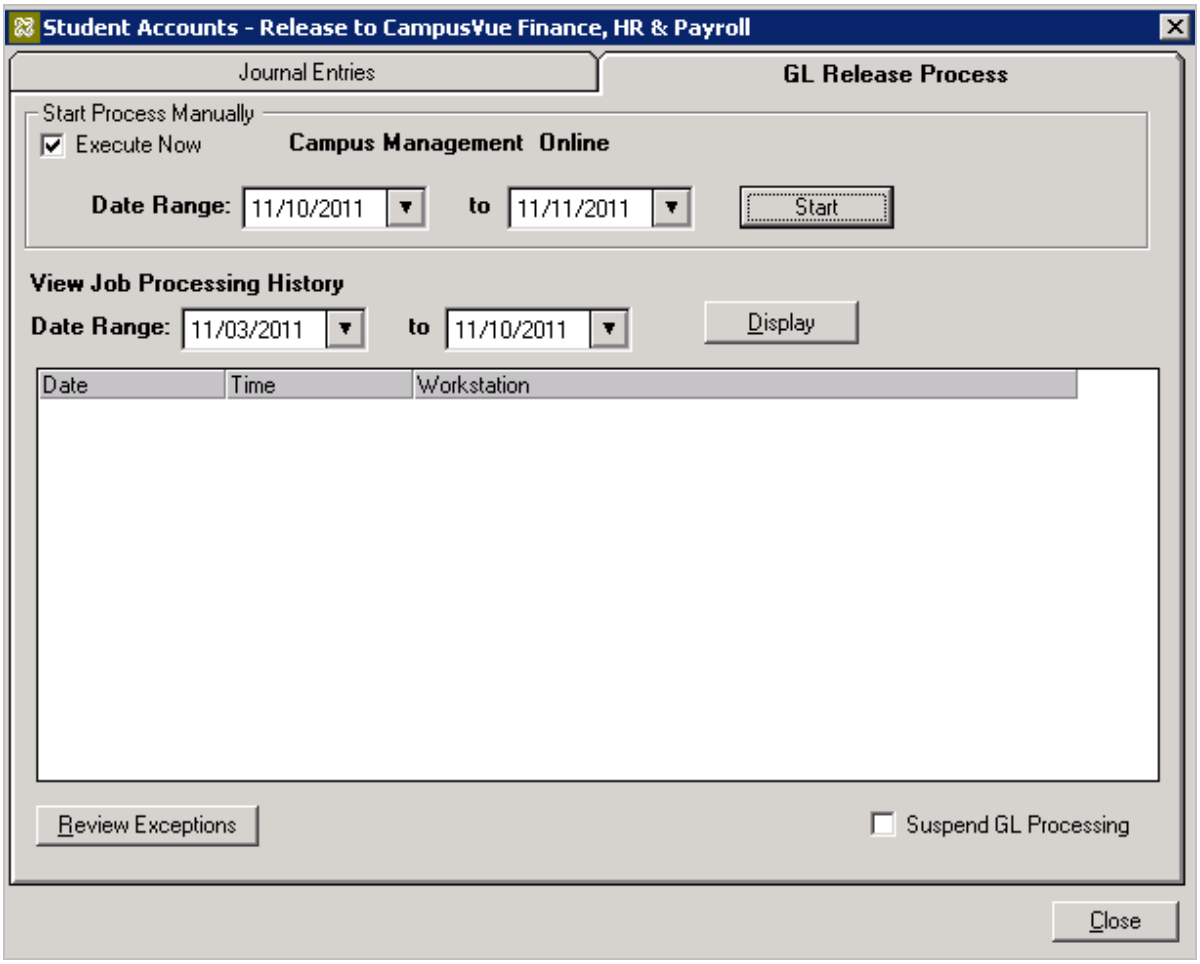
5/17/2010
11:20:21 AM

Account Number	Trans. Date	Description	Type	Student Name	Payment Type	Check No.	Debit Amount	Credit Amount	Net Change
Cost Account Number									
10.1366	10/20/2009	Student Payment	PMT	Alexis, Markita			15.00	0.00	
10.1340	10/20/2009	Student Payment	PMT	Alexis, Markita			0.00	15.00	
10.1366	10/20/2009	Student Payment	PMT	Porter, Comealia			10.00	0.00	
10.1340	10/20/2009	Student Payment	PMT	Porter, Comealia			0.00	10.00	
					Report Total		**$25.00**	**$25.00**	**$0.00**

8. Click **Summary** to view the summary information for the selected journal entry. Click **Back**, **Forward**, **Refresh**, and **Closed** to move from page to page, refresh the screen, print the summary, and close the form.



9. Click **Print** to view the printer dialog and select a local or network printer.
10. **GL Release Process** tab:



To manually release transactions to the general ledger of the integrated accounting system, select **Execute Now**, select a date range from the **Date Range** lists, and click **Start**.

To view the job processing history, select a date range from the **Date Range:** lists, and click **Display**. A list of journal entries per workstation by date and time is displayed containing information about when a batch was last run and who initiated the release to general ledger.

11. Once the process is complete, the Processing History in the lower part of the form is refreshed. Click Review Exceptions to display the exceptions that were not successfully added to the proper journal entry.

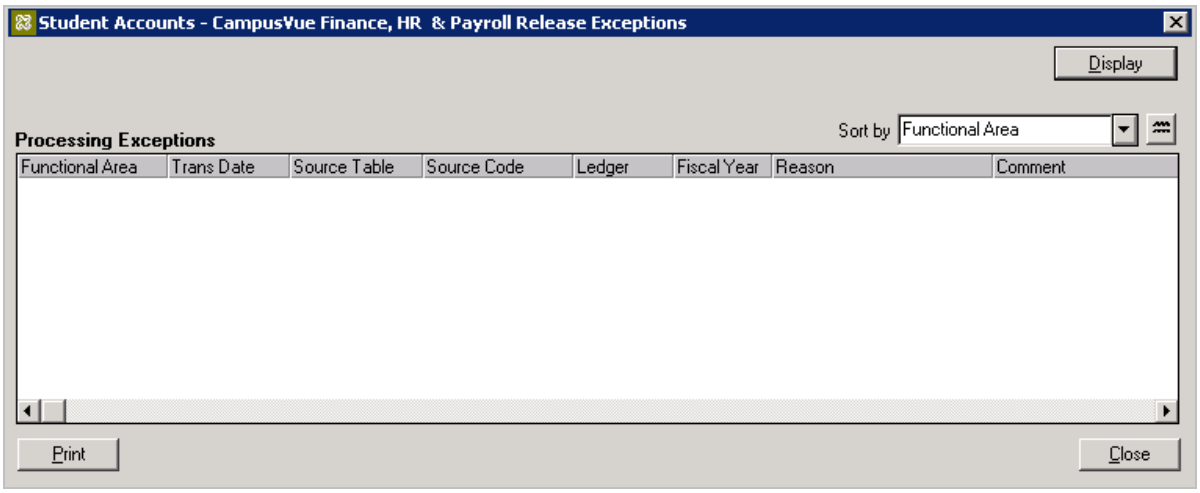
12. If the release process attempts to append transactions to a journal entry in the integrated accounting system, and the GL account and/or the cost account are invalid, the transaction is not added to the journal entry, and an entry is written to the error log.

    To view these processing exceptions, click **Review Exceptions**. The Student Accounts - CampusVue Finance, HR & Payroll Release Exceptions form is displayed.

    The individual responsible for reviewing the error log needs to correct invalid GL accounts and cost accounts. Once this is accomplished, access the Release to CampusVue Finance, HR & Payroll wizard and verify that the error was corrected and that the transaction was appended to a journal entry in the integrated accounting system.

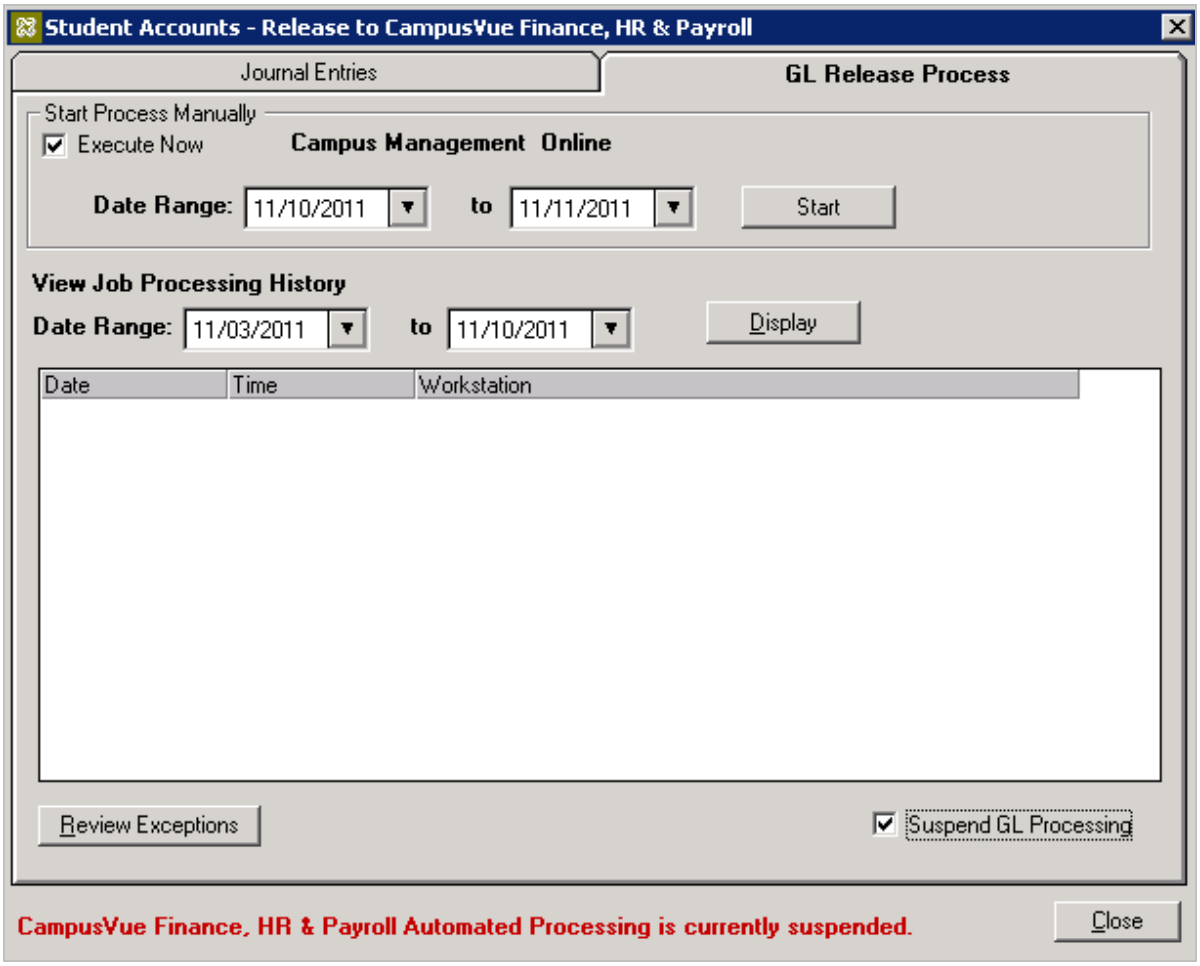
    Other exceptions can also appear in the error log. For example, an entry that is released for an item where the period in the integrated accounting system is closed would be in the log. For any campus using the same Fiscal

Year/Ledger, if errors previously existed in the error log, the period cannot be closed until those errors are fixed. CampusNexus Student attempts to send any transactions not already successfully sent on a previous run, and if successful, deletes the error log entry.



Click **Sort by** to sort the Processing Exceptions list by functional area, transaction date, source table, source code, ledger, fiscal year, reason, comment, or student. Click the up or down arrow to sort in ascending or descending order.

13. Click **Display** to display the latest errors and refresh the data.
14. If using Automated Release to GL, select **Suspend GL Processing** to stop the execution of the release to the accounting system. The message *... Automated Processing is currently suspended* is displayed in the bottom of the Journal Entries and GL Release Process tabs.



15. Clear the **Suspend GL Processing** check box to restart the process. Transactions that were not previously processed before the process was paused are released to the integrated accounting system's general ledger or the error log. The message *... Automated Processing is currently suspended* is removed from both tabs.

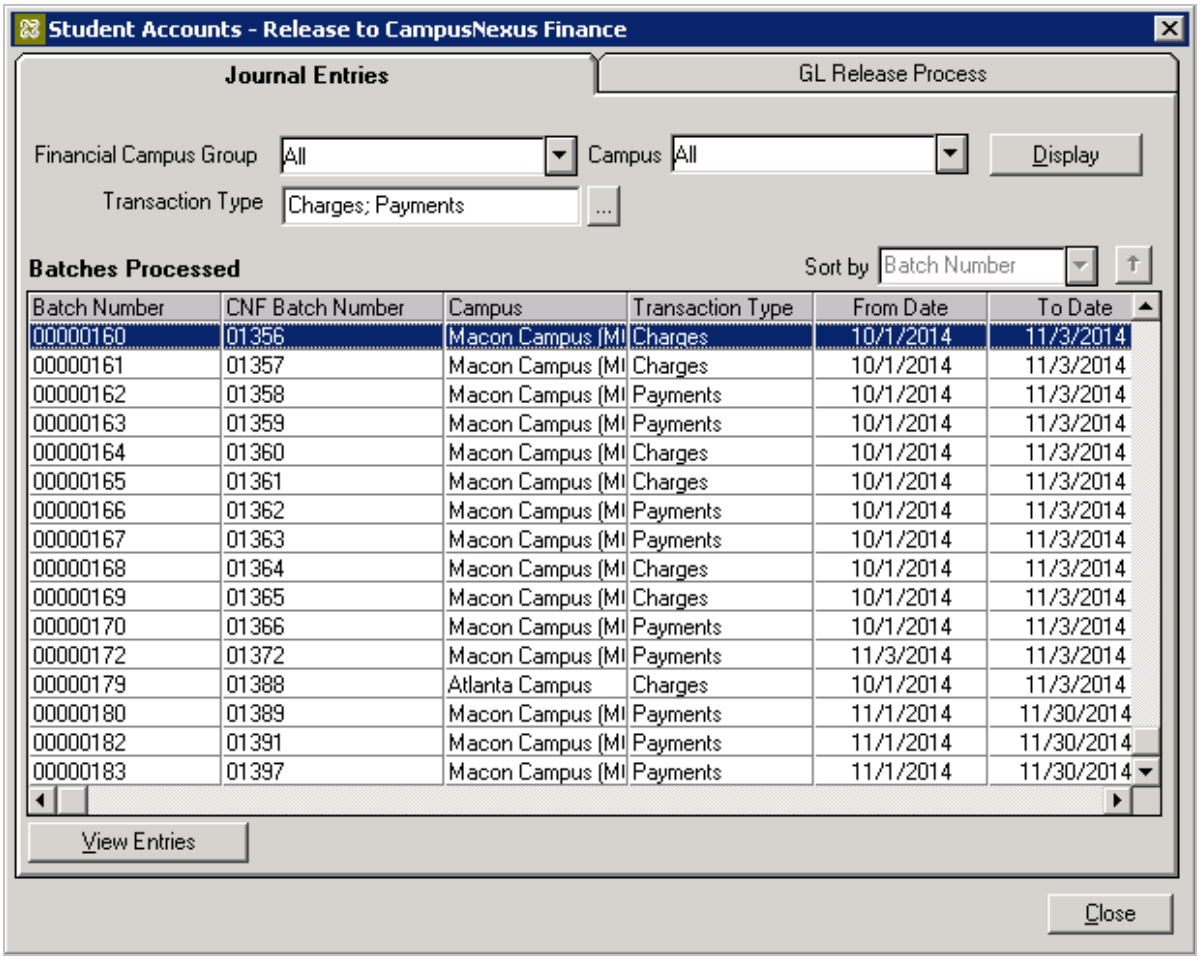
16. Select **Execute Now**, select a **Date Range**, and click **Start** to release transactions with dates in the date range provided in the Start Process Manually section of the form. The transactions in that date range that were not previously processed are released to the integrated accounting system's general ledger or the error log.

    Note: Warning messages are displayed if you attempt to enter a starting date that is below the *minimum* transaction date of the campus, or below the *Go-Live* date of the integrated accounting system. The Go-Live date is stored in the database as an added level of security to ensure transactions prior to the Go-Live date are not released even if the minimum transaction dates are incorrect.

To release transactions to CampusNexus Finance, HR & Payroll:

1. Navigate to **Daily > Student Accounts > Release to General Ledger**. The Student Accounts - Release to CampusNexus Finance, HR & Payroll wizard contains two tabs: Journal Entries and GL Release Process.

2. On the **Journal Entries** tab, you can review and print journal entries within the batch.



Select a **Financial Campus Group**, **Campus**, and/or a **Transaction Type**. The following Transaction Types are available:

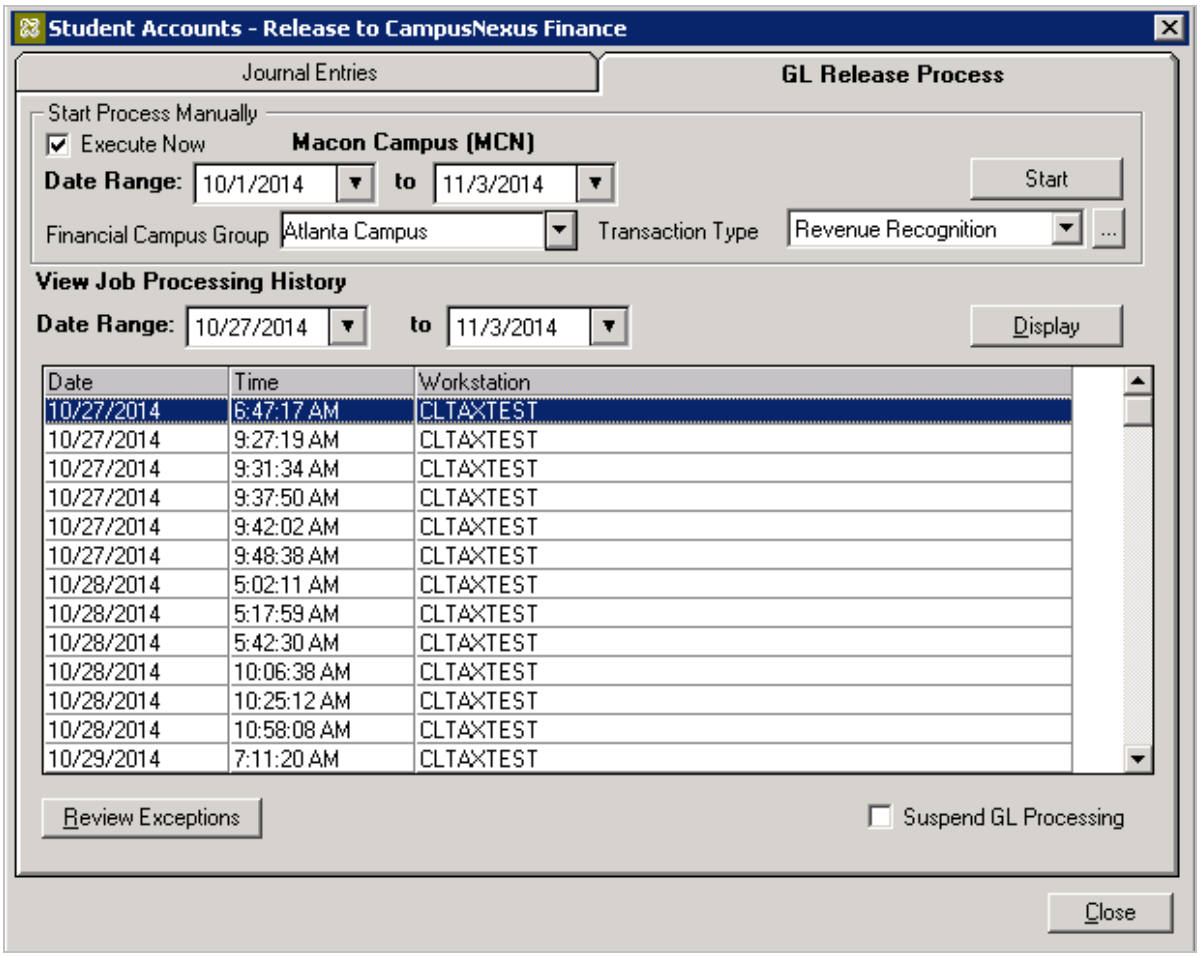
- Stipends
- Refunds
- Disbursements
- Payments
- Charges
- Subsidiary Ledger Payment
- Subsidiary Ledger Charges
- Subsidiary Ledger Refund

Note: When CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll, the Transaction Types 'Revenue Recognition' and 'Miscellaneous Receipts' are not available.

3. Click **Display** to produce a list of the batches processed based on the selections. The following columns are displayed:
   - Batch Number
   - CNF (CampusNexus Finance, HR & Payroll) Batch Number
   - Campus
   - Transaction Type
   - From Date
   - To Date
4. Select the batch from the list and click **View Entries**.

5. Click **Detail** to view the Report Selection form for the General Ledger Posting Detail report. Sort the report by campus, batch number, account number, debit amount, credit amount, transaction date, student name, transaction type, or description.
6. Click Preview to view the report.

   Note: Since Financial Campus Groups can cross multiple campuses, the campus selection tab is disabled on the Report Selection form; however, the report can be sorted by campus.
7. Click **Summary** to view the summary information for the selected journal entry. Click **Back, Forward, Refresh,** and **Closed** to move from page to page, refresh the screen, print the summary, and close the form.
8. Click **Print** to view the printer dialog and select a local or network printer.
9. **GL Release Process** tab:



To manually release transactions to the general ledger of the integrated accounting system, select **Execute Now**, select appropriate values from the following fields:

- **Date Range**
- **Financial Campus Groups**
- **Transaction Type** - The following Transaction Types are available:
  - Stipends
  - Refunds

- Disbursements
- Payments
- Charges
- Subsidiary Ledger Payment
- Subsidiary Ledger Charges
- Subsidiary Ledger Refund

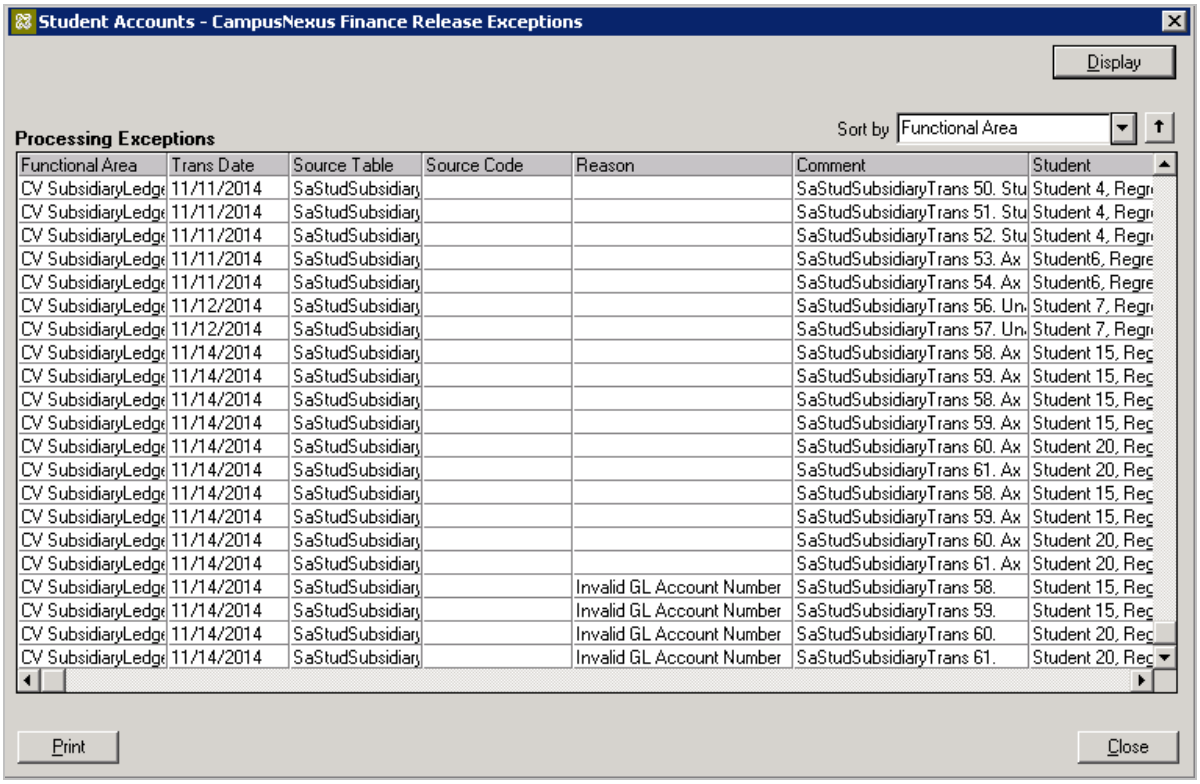
Note: When CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll, the Transaction Types 'Revenue Recognition' and 'Miscellaneous Receipts' are not available.

You can select to release by Financial Campus Group, Transaction Type, or both. By default, the release includes all Transaction Types for the current Campus if no Financial Campus Group or a particular Transaction Type is selected.

When releasing to GL by Financial Campus Group, you will see only those Financial Campus Groups for which you have permissions to all the campuses contained in that group.

10. Click **Start**. Once the process is complete, the Processing History in the lower part of the form is refreshed.
11. Click **Review Exceptions** to display the exceptions that were not successfully added to the proper journal entry.
12. To view the job processing history, select a date range from the **Date Range:** lists, and click **Display**. A list of journal entries per workstation by date and time is displayed containing information about when a batch was last run and who initiated the release to general ledger.
13. If the release process attempts to append transactions to a journal entry in the integrated accounting system, and the GL account is invalid, the transaction is not added to the journal entry, and an entry is written to the error log.

    To view these processing exceptions, click **Review Exceptions**. The Student Accounts - CampusNexus Finance, HR & Payroll Release Exceptions form is displayed.



Click **Sort by** to sort the Processing Exceptions list by functional area, transaction date, source table, source code, ledger, fiscal year, reason, comment, or student. Click the up or down arrow to sort in ascending or descending order.

The individual responsible for reviewing the error log needs to correct invalid GL accounts. Once this is accomplished, access the Release to CampusNexus Finance, HR & Payroll wizard and verify that the error was corrected and that the transaction appears in a journal entry in the integrated accounting system.

Other exceptions can also appear in the error log. For example, an entry that is released for an item where the period in the integrated accounting system is closed would be in the log. CampusNexus Student attempts to send any transactions not already successfully sent on a previous run, and if successful, deletes the error log entry.

Prior to CampusNexus Student version 17.1, details of all errors or warnings were displayed mostly in CampusNexus Finance, HR & Payroll, while exceptions in CampusNexus Student just displayed the message "*Please refer to exception log for details*." Now, all transaction exceptions are captured in both CampusNexus Student and CampusNexus Finance, HR & Payroll, and detailed information is displayed for exceptions related to Release and Posting of:

- Charges and Refunds
- Subsidiary Transactions
- Stipends

14. Click **Display** to display the latest errors and refresh the data.
15. Select **Execute Now**, select a **Date Range**, and click **Start** to release transactions with dates in the date range provided in the Start Process Manually section of the form. The transactions in that date range that were not previously processed are released to the integrated accounting system's general ledger or the error log.

    Note: Warning messages are displayed if you attempt to enter a starting date that is below the minimum transaction date of the campus, or below the Go-Live date of the integrated accounting system. The Go-Live date is stored in the database as an added level of security to ensure transactions prior to the Go-Live date are not released even if the minimum transaction dates are incorrect.

Creating Journal Entries for an Integrated Accounting System

The Release to CampusVue Finance, HR & Payroll OR Release to CampusNexus Finance, HR & Payroll service/job looks for transactions that have not been released to the integrated accounting system and creates a journal entry or appends the transactions to a current period's journal entry.

Revenue Recognition Journal Entry Groups

Clients continue to use the Revenue Recognition wizard in CampusNexus Student. The transaction date is used to determine the end date of the period in which revenue was calculated.

Bank Deposit Journal Entry Groups (CampusVue Finance, HR & Payroll)

Student deposits, payments to student ledger cards, and miscellaneous receipts continue to be entered through CampusNexus Student using the current functionality. Non-sufficient funds (NSF) transactions are not gathered or sent from CampusNexus Student to the integrated accounting system. They are reconciled through the accounting system.

Note: This means that users of the integrated accounting system are REQUIRED to use the Bank Deposits feature in CampusNexus Student.

The payments debit the new Deposits Pending account that is configured (Lists > Student Accounts > Bank Codes > Bank Accounts). These transactions continue to feed the Bank Deposit form (Daily > Student Accounts > Bank Deposit) in CampusNexus Student. Once a user enters a deposit in CampusNexus Student, successfully prints the bank deposit slip, and clicks the Finish button in the Deposit Posting wizard, a record is written to the Bank Reconciliation table in the integrated accounting system.

CampusNexus Student and the integrated accounting system continue to create banking transactions using their respective existing programs; however, to achieve a single bank register for reconciliation and auditing, CampusNexus Student provides the following:

- The Bank Deposit functionality in CampusNexus Student creates deposit transactions in the CampusVue Finance, HR & Payroll's bank register table, which interfaces detail transactions from the Student Ledgers and Miscellaneous Cash Receipts as individual accounting system bank transactions.
- A bank transaction is created for each student deposit and/or Miscellaneous Cash Receipts, and an accounting system General Ledger transaction. Student payments and Miscellaneous Cash Receipts are posted to the accounting system's General Ledger when the 'Release to CampusVue Finance, HR & Payroll' general ledger posting service runs. Those transactions credit an Accounts Receivable account, and debit a Deposits Pending account. When the deposit transactions are entered in CampusNexus Student and sent to the accounting system via the Release to GL, a debit to the bank's General Ledger Cash ledger account and a credit to the Pending Deposits ledger account are made in the Bank Deposit Journal Entry in the accounting system.
- All banking transactions in the accounting system require a Batch identifier for auditing. Therefore, CampusNexus Student uses "CV" concatenated with the SaBankDepID to populate the Batch identifier.

Bank Deposit Journal Entry Groups (CampusNexus Finance, HR & Payroll)

When CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll, bank deposits are done in CampusNexus Finance, HR & Payroll and the Bank Deposits functionality in CampusNexus Student is disabled.

Adjust Transaction (NSF - returned checks) (CampusVue Finance, HR & Payroll)

NSF transactions continue to be processed using the existing functionality in CampusNexus Student (View > Student Accounts > Ledger Cards > Adjust Transaction > Returned Check button), with the following exceptions:

- The transaction debits the Accounts Receivable Account, and credits the NSF Pending account. When the NSF transaction is recorded in the accounting system via the Bank Reconciliation, it credits the Cash account and debit the NSF Pending account. CampusNexus Student allows the NSF Pending account to be associated with each bank account. The NSF Pending account is set up via the (Lists > Student Accounts > Bank Codes > Bank Accounts) path.
- The transaction is available to be picked by the release to the accounting system process that references the accounts receivable and new NSF Pending account. The NSF transaction becomes part of the Bank Reconciliation function in the integrated accounting system.
- These types of transactions do not require a separate journal entry group, rather, it is part of the standard Student Ledger card journal entry.

CampusNexus Student and integrated accounting systems currently support NSF transactions. The timing of the client's notification of NSF checks is controlled by the bank. It may take the form of a letter, or discovered through the monthly bank statement, or during online bank reconciliation.

Regardless of the method and timing of notification, CampusNexus Student must create NSF transactions to update the Student Ledger and miscellaneous cash, while the accounting system must create an NSF bank transaction.

After entry into CampusNexus Student, the NSF transaction is sent to the integrated accounting system via the General Ledger interface. The 'Release to CampusVue Finance, HR & Payroll' service/job looks for transactions that have not been released to the accounting system and creates a journal entry or appends the transactions to a current period's journal entry.

The GL accounts of the NSF transactions should debit the student Accounts Receivable account and credit the Deposits Pending account configured on the Bank Account in CampusNexus Student. This transaction is associated with the appropriate Student Ledger Journal Entry in the integrated accounting system at the time of the Release to GL.

Releasing this NSF 'deposit' to the GL debits the Deposits Pending accounts and credits the NSF Pending account using the Student Accounts Journal Entry. Both these accounts are configured on the Bank Account in CampusNexus Student.

In addition to correcting the Student Ledger or Miscellaneous Cash Receipt, you can enter the NSF transaction through the accounting system's Bank Reconciliation Feature, which will credit the Cash account and debit the selected account (NSF Pending account).

Miscellaneous Receipts Journal Entry Groups

Miscellaneous receipts are grouped in their own journal entries. As with the other transactions, a service/job is scheduled to run on a continuing basis to pick up the transactions that have not been moved over to the appropriate journal entry in the accounting system.

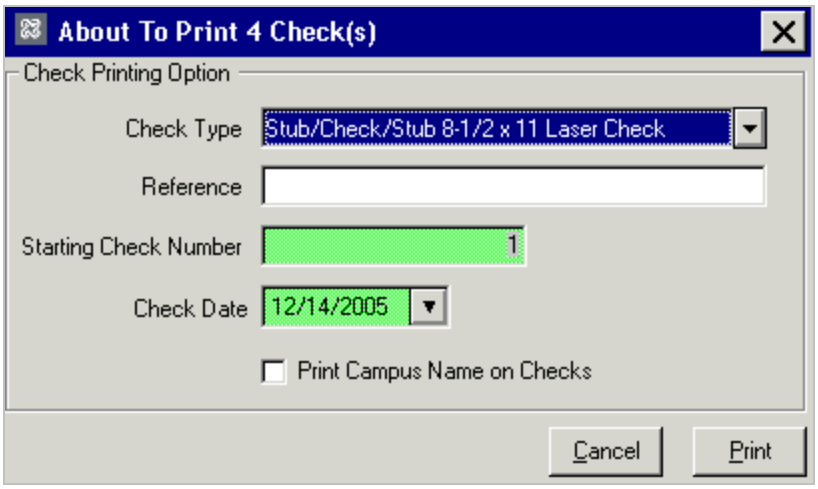
Because the Bank Deposit journal entries are responsible for transferring undeposited cash to the actual cash account when the deposit is made, the service/job sends Miscellaneous receipts to the Deposits Pending account (Lists > Student Accounts > Bank Codes > Bank Accounts).

Stipend and Refund Check Printing (CampusVue Finance, HR & Payroll)

The printing of stipend checks and refunds remains in CampusNexus Student (see Process Refunds/Stipend); however, transactions are sent to the integrated accounting system's Bank Reconciliation function. This includes EFT and ACH transactions and ensures that all transactions affecting the bank accounts are included in the bank reconciliation process in the integrated accounting system.

Note: Beginning with CampusNexus Student 14.0, you can set up unique debit and credit accounts for stipends so that you do not have to use the same accounts as your refunds.

When the Process Refunds/Stipends wizard is used to print checks, the *Starting Check Number* reflects the next available check number for the selected bank account. The check number is a default value that can be overwritten to a higher check number. To make the check number lower, navigate to Lists > Student Accounts > Bank Codes and update the last check number on the appropriate bank account.



Stipend and Refund Check Printing (CampusNexus Finance, HR & Payroll)

When CampusNexus Finance, HR & Payroll is integrated with CampusNexus Student, the check printing functionality is disabled in CampusNexus Student. Checks are printed only from within CampusNexus Finance, HR & Payroll.

CampusNexus Student sends the transaction details for refunds and stipends to CampusNexus Finance, HR & Payroll. The details include:

- Payee Name
- Payee Address
- Amount
- Bank Account
- Campus Name
- Fund ID
- Award Year

- Term
- Payment Period (if applicable)

For refund transactions with payment method 'Master Checks', CampusNexus Student sends the following information in addition to the transaction details to CampusNexus Finance, HR & Payroll for check printing:

- Reference Number
- Bank Account Number
- Payee Name
- Payee Address
- Student ID(s)
- Amount being refunded for each student

CampusNexus Student updates the transaction status in the student ledger to *Pending* once the information has been sent to CampusNexus Finance, HR & Payroll for check printing. The user can select *Show Pending AP Transactions* on the student Ledger Card.

When check printing is completed, CampusNexus Finance, HR & Payroll updates the transactions in CampusNexus Finance, HR & Payroll with the Check Number and Date Paid and sends the same information to CampusNexus Student.

Based on the information received from CampusNexus Finance, HR & Payroll, CampusNexus Student updates the Refund/Stipend transaction with the Check Number and the Date Paid.

In CampusNexus Student, the user can view the Check Number and Date Paid in the following locations:

- View > Student Accounts > Stipend Schedule
- View > Student Accounts > Ledger Card (Check #/Ref# column)

When processing refunds related to Master Checks, CampusNexus Student marks the transactions ready for Release to GL so that the transactions can be sent to CampusNexus Finance, HR & Payroll.

Processing Voids

Student Account administrators can void transactions in CampusNexus Student by using the Adjust Transaction function of the student Student Ledger Card. When a transaction is voided, CampusNexus Student reverses the Credit and the Debit accounts configured on the G/L Link form for charges or the Fund Source Code Setup form for payments for the transaction or fund source associated with the transaction.

Checks are voided and/or rescheduled using the Void Master Check form. The transactions are sent to the banking module of the integrated accounting system if configured to do so.

When CampusNexus Finance, HR & Payroll is integrated with CampusNexus Student, student transactions cannot be voided within CampusNexus Finance, HR & Payroll.

Ledger Cards (CampusVue Finance, HR & Payroll)

All student ledger entries continue to be entered in CampusNexus Student. These transactions need to hit the appropriate GL accounts based on how the transaction codes are configured. NSF transactions are not gathered or sent from CampusNexus Student to the integrated accounting system. They are reconciled through the accounting system.

Currently, an adjustment cannot be made to a transaction if it has already been released to the GL in CampusNexus Student. However, with the Service possibly running every 5 minutes, it would not be feasible to tell customers that they cannot do adjustments once the perpetual service already released the transaction. Therefore, CampusNexus Student allows adjustments to transactions even if the transaction has been released to the accounting system.

When adjustments are made, the integrated accounting system checks if the parent record being adjusted has been released to the GL of the accounting system. If so, the adjustment is also released.

Ledger Cards (CampusNexus Finance, HR & Payroll)

CampusNexus Student maintains the following ledgers:

- Main Ledger (charges, refunds, stipends, payments and related voids)
- Subsidiary Ledger(charges, refunds, payments and related voids)

CampusNexus Finance, HR & Payroll has only one ledger (Student Ledger) that shows the transactions from all CampusNexus Student ledgers and thereby includes all balances for calculating the ledger balance. In version 2.1 and later, CampusNexus Finance, HR & Payroll provides a filter that allows the user to view each of the CampusNexus Student ledgers separately. The default view is the Main Ledger. CampusNexus Finance, HR & Payroll calculates the balances depending on the selected ledger so that the balances can be reconciled with the separate ledgers in CampusNexus Student.

Subsidiary Transaction

CampusNexus Student allows adjustments to transactions even if the transaction has been released to the integrated accounting system because the perpetual service looks for transactions on a regular basis and posts them to the integrated accounting system. See also Student Subsidiaries.

When adjustments are made, CampusNexus Student checks if the parent record being adjusted has been released to the accounting system's GL. If so, the adjustment is also released when the service makes its pass on Subsidiary Adjustment Transactions.

For more information, see Adjust Transaction and Process Refunds/Stipends.

Configuring Automated Release to the Integrated Accounting System (CampusVue Finance, HR & Payroll)

The automated process is configured using a configuration file editor located in the CampusNexus Student folder `C:\ProgramFiles\cmc\CampusNexus Student\Cmc.CampusVue Finance, HR & Payroll.GL.ClientService.Configuration.exe`. Anthology Inc. Integration Service provides instructions on how to configure these options. The following types of options can be configured.

- Web Service URLs
- CampusNexus Student user name that is used as the login by the service to release records to the integrated accounting system
- Campuses which should automatically have transactions released to the integrated accounting system
- Polling interval indicating how often the service runs. Some clients may want the process running every 10 seconds, while others only want it running every 5 minutes (300 seconds).

Release to General Ledger

The General Ledger Release must include transactions that are tied to a subsidiary and payments that are made to a subsidiary. This option exports batches of the standard transactions, including summarized ledger card and revenue transactions, and the transactions held in the subsidiary transaction table, to your general ledger (G/L) system. G/L account numbers are associated with the transaction codes. The posting produces a summary and detail report. The user can also export the transactions, by account number, to a text file or HTML document. **The only proprietary transaction format supported at this time is Great Plains Software.** G/L transactions can be exported to other systems via generic flat files.

The release to G/L uses the Campus ID from the revenue ledger when looking up the G/L account numbers. An enrollment can have revenue entries for more than one campus. CampusNexus Student uses the Campus ID from the deferred revenue entry.

When you release transactions to the G/L, the related records in CampusNexus Student are marked as posted. Therefore, they will not be included in any future new batch. Be sure that you are ready to release the activity from CampusNexus Student to the general ledger system before you click OK at the end of this procedure.

It is possible to rebuild a previously released batch for recreating the export file. The same transactions are used with the same date and batch number.

Financial Aid Fund Sources

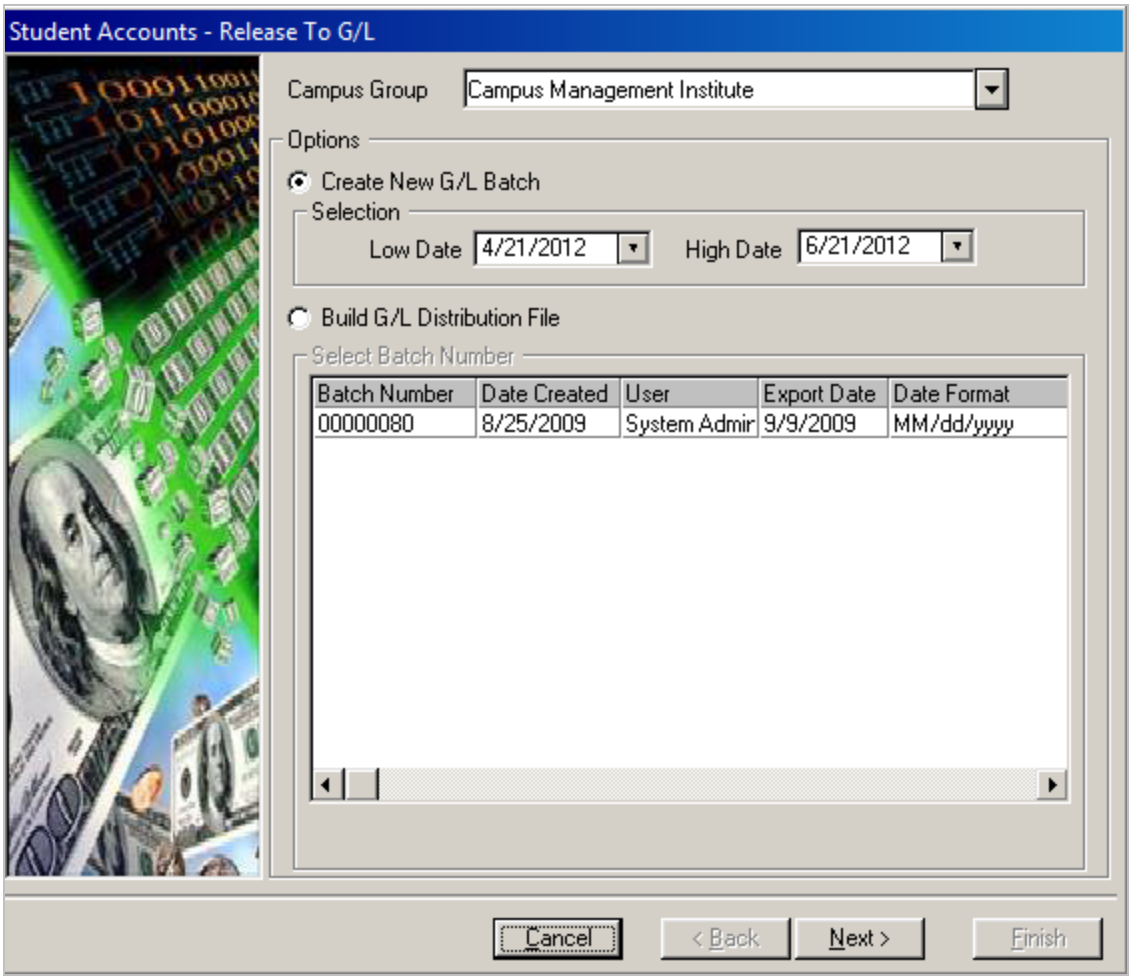
The Release to General Ledger option gathers the GL accounts for monies received from and refunded to FA fund sources. If GL debit and/or credit accounts are specified for a fund source, these accounts are used to post for this fund source as opposed to the default accounts used for cash received and refunded transactions. GL accounts are set up under Lists > Financial Aid > Fund Source.

Reports

The G/L Summary and Detail reports and the G/L Account code setup report are displayed in HTML. When viewing the summary, G/L accounts tied to subsidiaries are included. When viewing the detailed report of the G/L Release, you can see any transactions or payments made to subsidiaries as part of the overall journal entry that the G/L Release logic constructs. To print the HTML report, right-click on the report and select Print.

To release transactions to your G/L system (create a transaction list and file):

1. Navigate to **Daily** > **Student Accounts** > **Release to General Ledger**. The Student Accounts - Release to G/L wizard is displayed. The wizard defaults to the **Campus** in which you are currently working. If you are so authorized, the Campus Group list will be available and you can select another group.



2. Select **Create New G/L Batch** to start a new batch of general ledger transactions, or select **Build G/L Distribution File** to build another distribution file from a batch that was previously released.
3. If you selected the **Create New G/L Batch** option, enter the **Low Date** and **High Date** of transactions to be included in the batch.
4. If you selected the **Build G/L Distribution File** option, select the **Batch Number** for which a distribution file is to be built.
5. Click **Next**.

   CampusNexus Student gathers the appropriate transactions to be included in the batch and presents a **G/L Summary** in a grid format. The **Batch Number** will be shown at the bottom of the grid.
6. You can set the batch number to be assigned to the next G/L batch at **Setup > Student Accounts**.
7. To export the data to a file, click the **Export GL to File** button and select the format and path to save the file. The format and export path are set up in Setup > Student Accounts > Additional tab > G/L Export File Definition.

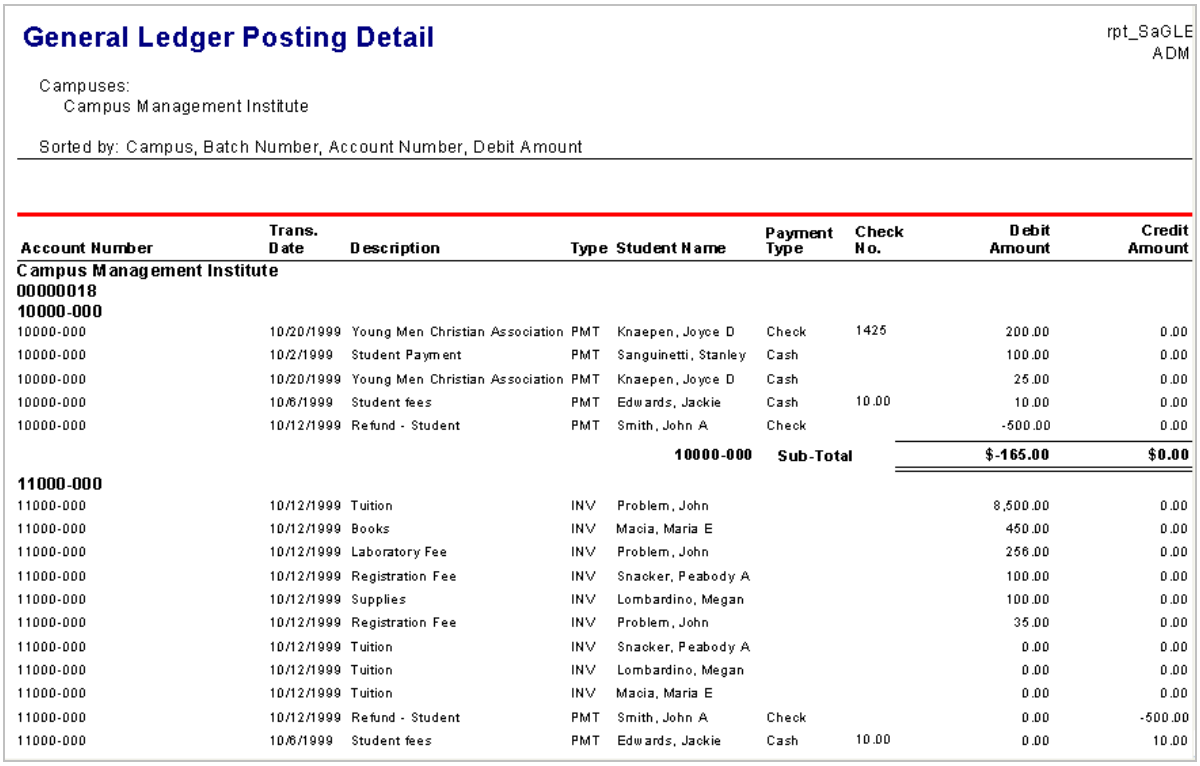
   Note: If the file export destination detail is configured in Setup > Student Accounts > Additional > GL Export File Definition:

- The message *"GL File will be exported to a specified location (include destination location in message) - select OK to continue."* is displayed. Click **OK** or **Cancel**.
- If you select **OK**, the Export GL File will automatically be transported to the destination defined via Setup > Student Accounts > Additional > GL Export File Definition.

If no file export destination detail is configured in Setup > Student Accounts > Additional > GL Export File Definition, CampusNexus Student provides the default mapped location that is configured in Setup > Campus Location > Accounting > GL Export, and you will receive confirmation notification that file was saved successfully.

8. Click **Detail** to view and/or print a Crystal report listing all the student transactions that make up the summary. The Company Number (for the campus) will be added to the GL account numbers in the exported transactions.

   This report can also be exported to Excel.



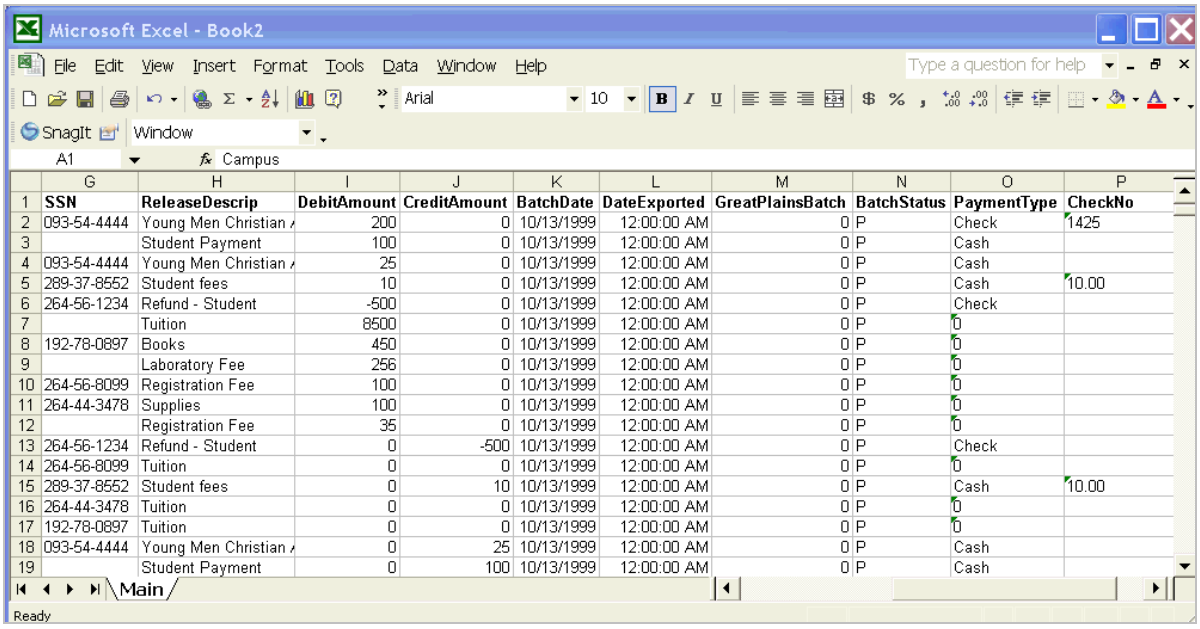
General Ledger Posting Detail

rpt_SaGLE
ADM

Campuses:
Campus Management Institute

Sorted by: Campus, Batch Number, Account Number, Debit Amount

Account Number	Trans. Date	Description	Type	Student Name	Payment Type	Check No.	Debit Amount	Credit Amount
Campus Management Institute								
00000018								
10000-000								
10000-000	10/20/1999	Young Men Christian Association	PMT	Knaepen, Joyce D	Check	1425	200.00	0.00
10000-000	10/2/1999	Student Payment	PMT	Sanguinetti, Stanley	Cash		100.00	0.00
10000-000	10/20/1999	Young Men Christian Association	PMT	Knaepen, Joyce D	Cash		25.00	0.00
10000-000	10/6/1999	Student fees	PMT	Edwards, Jackie	Cash	10.00	10.00	0.00
10000-000	10/12/1999	Refund - Student	PMT	Smith, John A	Check		-500.00	0.00
				10000-000	**Sub-Total**		**$-165.00**	**$0.00**
11000-000								
11000-000	10/12/1999	Tuition	INV	Problem, John			8,500.00	0.00
11000-000	10/12/1999	Books	INV	Macia, Maria E			450.00	0.00
11000-000	10/12/1999	Laboratory Fee	INV	Problem, John			256.00	0.00
11000-000	10/12/1999	Registration Fee	INV	Snacker, Peabody A			100.00	0.00
11000-000	10/12/1999	Supplies	INV	Lombardino, Megan			100.00	0.00
11000-000	10/12/1999	Registration Fee	INV	Problem, John			35.00	0.00
11000-000	10/12/1999	Tuition	INV	Snacker, Peabody A			0.00	0.00
11000-000	10/12/1999	Tuition	INV	Lombardino, Megan			0.00	0.00
11000-000	10/12/1999	Tuition	INV	Macia, Maria E			0.00	0.00
11000-000	10/12/1999	Refund - Student	PMT	Smith, John A	Check		0.00	-500.00
11000-000	10/6/1999	Student fees	PMT	Edwards, Jackie	Cash	10.00	0.00	10.00



	G	H	I	J	K	L	M	N	O	P
1	SSN	ReleaseDescrip	DebitAmount	CreditAmount	BatchDate	DateExported	GreatPlainsBatch	BatchStatus	PaymentType	CheckNo
2	093-54-4444	Young Men Christian A	200	0	10/13/1999	12:00:00 AM	0	P	Check	1425
3		Student Payment	100	0	10/13/1999	12:00:00 AM	0	P	Cash	
4	093-54-4444	Young Men Christian A	25	0	10/13/1999	12:00:00 AM	0	P	Cash	
5	289-37-8552	Student fees	10	0	10/13/1999	12:00:00 AM	0	P	Cash	10.00
6	264-56-1234	Refund - Student	-500	0	10/13/1999	12:00:00 AM	0	P	Check	
7		Tuition	8500	0	10/13/1999	12:00:00 AM	0	P	0	
8	192-78-0897	Books	450	0	10/13/1999	12:00:00 AM	0	P	0	
9		Laboratory Fee	256	0	10/13/1999	12:00:00 AM	0	P	0	
10	264-56-8099	Registration Fee	100	0	10/13/1999	12:00:00 AM	0	P	0	
11	264-44-3478	Supplies	100	0	10/13/1999	12:00:00 AM	0	P	0	
12		Registration Fee	35	0	10/13/1999	12:00:00 AM	0	P	0	
13	264-56-1234	Refund - Student	0	-500	10/13/1999	12:00:00 AM	0	P	Check	
14	264-56-8099	Tuition	0	0	10/13/1999	12:00:00 AM	0	P	0	
15	289-37-8552	Student fees	0	10	10/13/1999	12:00:00 AM	0	P	Cash	10.00
16	264-44-3478	Tuition	0	0	10/13/1999	12:00:00 AM	0	P	0	
17	192-78-0897	Tuition	0	0	10/13/1999	12:00:00 AM	0	P	0	
18	093-54-4444	Young Men Christian A	0	25	10/13/1999	12:00:00 AM	0	P	Cash	
19		Student Payment	0	100	10/13/1999	12:00:00 AM	0	P	Cash	

9. Click **Print**.
10. Click **Next**. The message *"OK to Post G/L Entries?"* is displayed. Be sure before you answer this question. Answer **Yes** to continue with the release procedure.

    CampusNexus Student disables "Next" if there is a problem with the GL Link setup, (for example, when an invalid account is found during the gather).
11. The wizard completes the posting procedure and displays a confirmation message. Click **OK** and continue.
12. The wizard prompts for some information to **Process G/L Distribution File**. Select your **General Ledger** system. Enter a **File Name** for the distribution file or browse to the directory location. Select a file **Format** for your distribution file.
13. Click **Build** to build the G/L Distribution File. When the file has been successfully created, the wizard displays a confirmation message. Click **OK** to acknowledge the message.
14. Click **Finish** to close the wizard.

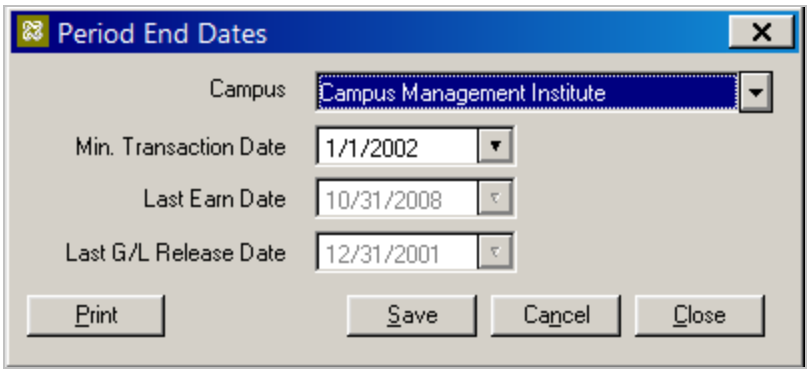
Period End Dates

Use the Period End Dates option to view significant dates in the periodic accounting activities of the institution. For campuses to which the user has access, the form shows the Minimum Transaction Date, the Last Earn Date, and the Last General Ledger Release Date. The dates are the same ones shown on the Accounting tab in the Campus Detail form. You can edit the Minimum Transaction Date.

Security for this form follows the normal CampusNexus Student security rules. If the menu option is not available on your screen, access has not been granted by the system administrator.

To change the Minimum Transaction Date:

1. Navigate to **Daily** > **Student Accounts** > **Period End Dates**. The Period End Dates form is displayed.



2. Select the **Campus** for which you want to change the Minimum Transaction Date.
3. Select the **Minimum Transaction Date**. This is the date before which ledger transactions will not be accepted. It is normally updated after you run the Release to General Ledger procedure. CampusNexus Student rejects transactions with dates earlier than this date.
4. Click **Print** to print a report of the dates on the form. For each campus, the report lists the Campus Code, Campus Name, Revenue Run date, GL Released date, and Minimum Transaction Date. You can export the reported information to Excel.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Student Subsidiaries

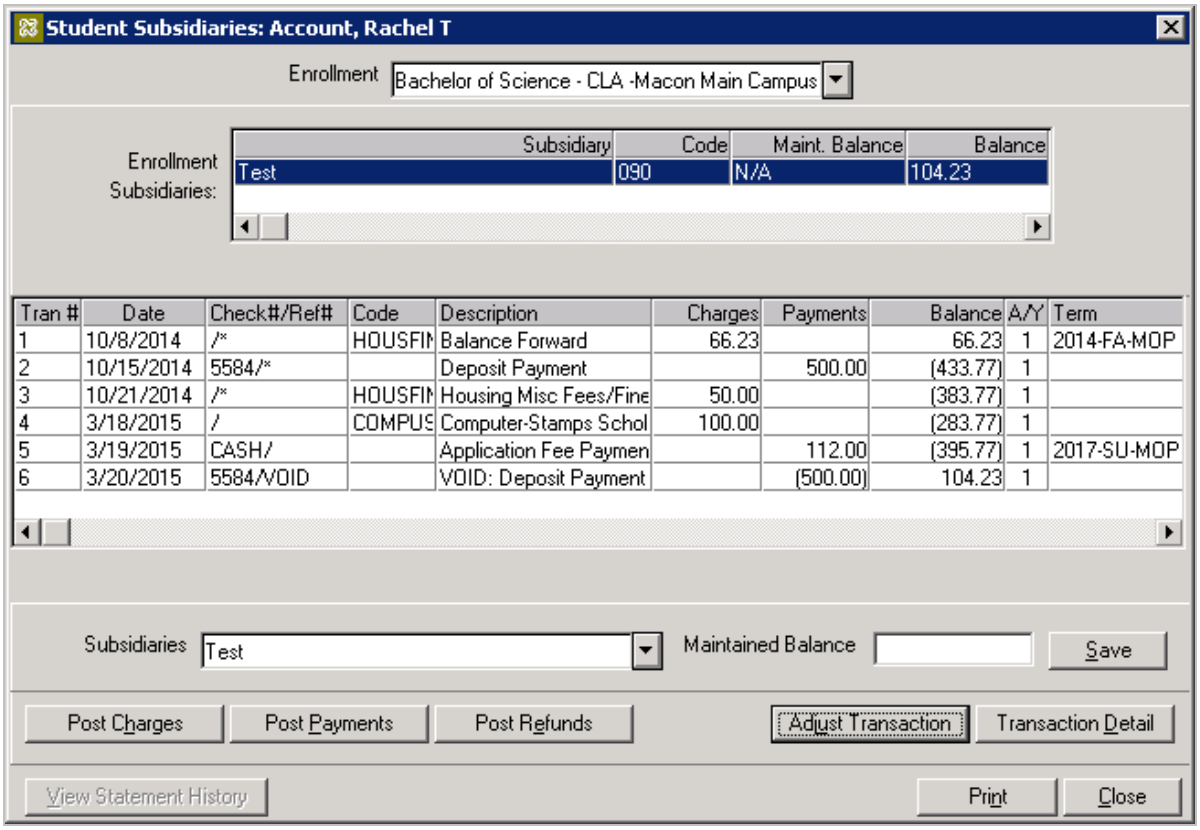
Transactions posted to a student's subsidiary account do not affect the student ledger card balance but affect the balance of the subsidiary. Funds can be released from a subsidiary to the student general ledger card to address situations that arise, for example, when a student pays a housing deposit and then must be charged for damages out of that deposit.

Refer to the following topics related to student subsidiaries:

- Creating a subsidiary
- Configuring a maintained balance
- Posting payments or charges to a subsidiary
- Posting refunds
- Processing refunds/stipends
  Refer to this topic for information about specific conditions that apply when CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll.
- Adjusting a transaction
  Refer to this topic for information about limitations that apply when adjusting a transaction and specific conditions that apply when CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll.
- Viewing transaction details
- Transferring subsidiary transactions upon an enrollment transfer

To create a subsidiary:

1. Select a student.
2. Navigate to **View** > **Student Accounts** > **Subsidiary**. The Student Subsidiaries form is displayed (if the 'Use Subsidiary' setup flag is True).



3. Select an **Enrollment**.
4. Select a subsidiary in the **Subsidiaries** field.
5. Enter the **Maintained Balance** amount for the selected subsidiary for that student. This is the balance the student must maintain in the subsidiary. This is entered in the form of a credit balance. For example, if a student must have $500.00 balance on file, that will reflect as a credit balance of -500.00 or be displayed as (500.00).
6. Click **Save**. The saved subsidiary appears in the Enrollment Subsidiaries section displaying the Subsidiary name, Code, Maintained Balance, and Balance. The balance is calculated using the same logic that is used for the regular ledger card. Payments create a negative balance, while charges increase the balance.

   As charges and payments are posted to the subsidiary, they appear beneath the Enrollment Subsidiaries section of the form, displaying details such as Transaction number, Date, Check number and Reference number, Code, Description, Charge amount, Payment amount, Academic Year, and Term.
7. Click **Print** to print a report of the charges and payments posted to the selected subsidiary.

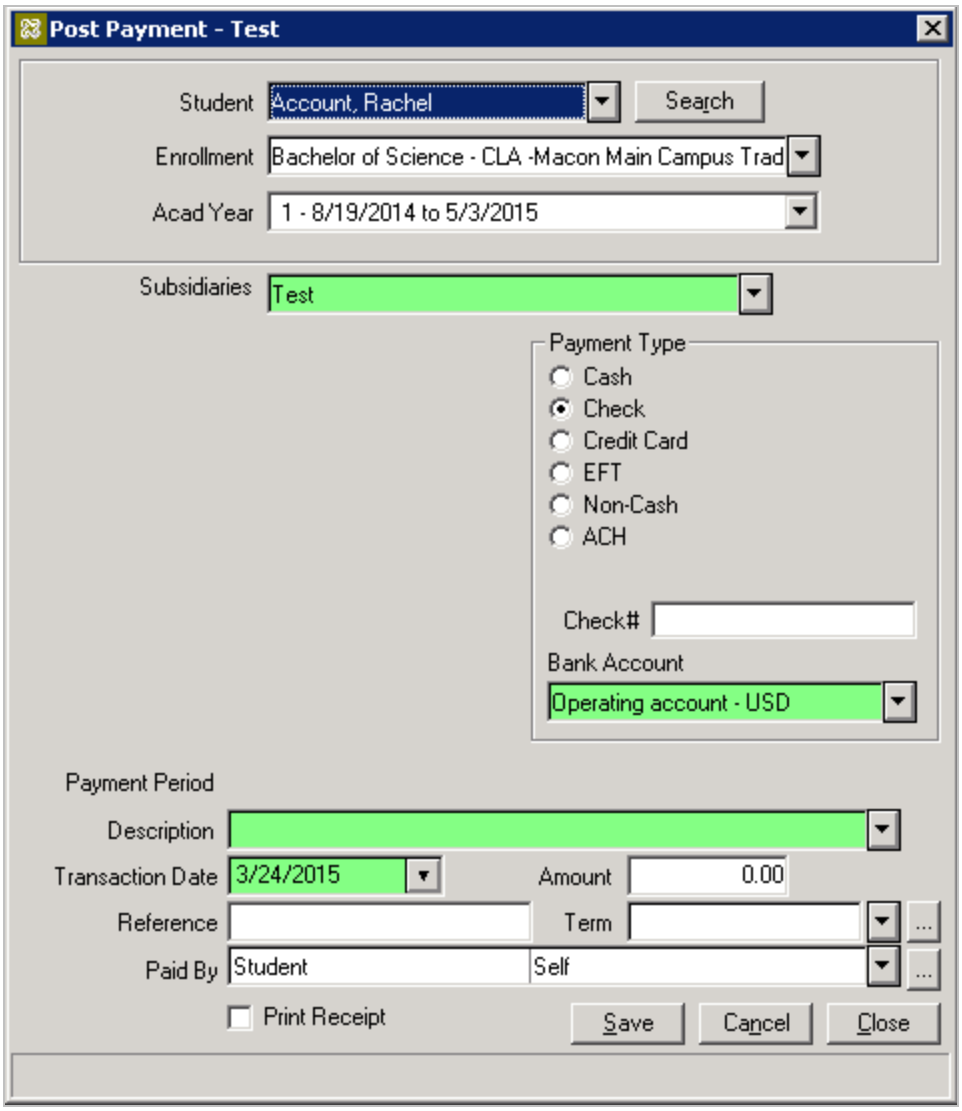
   Note: You can also print Subsidiary statements for 'All Enrollments' from the Subsidiary form.

To post payments or charges to a subsidiary:

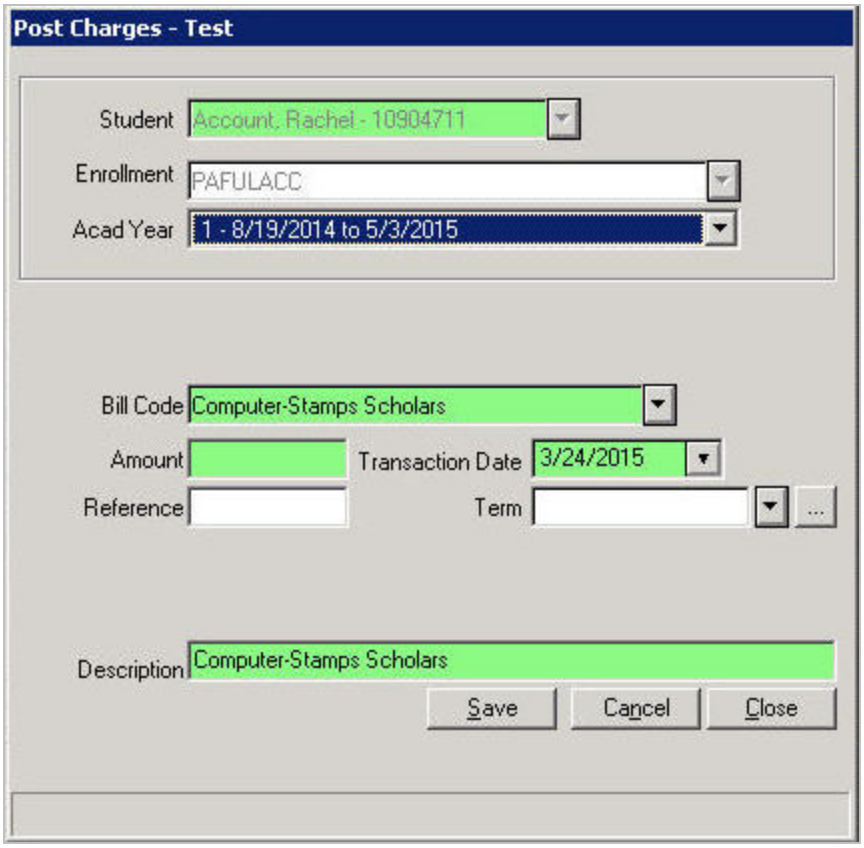
A new subsidiary can have payments and charges posted to it. Payments create a negative balance while charges increase the balance. You can designate to which subsidiary a payment is posted.

When a charge is posted with a transaction code that is associated with a subsidiary, the charge is posted only to the appropriate subsidiary without being reflected on the student ledger card. If the student has a credit balance in the subsidiary due to a deposit and that amount is not enough to cover the cost of the charge, there will be a positive balance on the subsidiary.

1. Navigate to **View** > **Student Accounts** > **Subsidiary**. The Student Subsidiaries form is displayed.
2. Select a subsidiary from the **Enrollment Subsidiaries**.
3. To post a payment, click **Post Payment**. The Post Payment form is displayed. The name of the selected subsidiary is displayed on the title bar.



4. To post a charge, click the **Post Charges** button. The Post Charges form is displayed. The name of the selected subsidiary is displayed on the title bar.



5. Complete applicable fields on the Post Payment or Post Charges form.
6. Click **Save**.
    - For a payment, only the balance on the subsidiary is affected.
    - For a charge, the balance on the subsidiary is increased.
7. Click **Close** to close the form. You are returned to the Student Subsidiaries form, which now displays the payment or charge you just posted.
8. Click **Print** to print a receipt for the payment or charge. You can view the receipt before it is printed.
9. Click **Close** to close the form.

Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

Audit Features

The audit features for Student Accounts include:

- CampusNexus Student stores the name of the payee on each refund record, stipend record, and subsidiary refund so that it can be retrieved for reporting purposes.
- CampusNexus Student audits changes to the payee for refunds and stipends. Auditing occurs from the time the refund or stipend is scheduled to the time the refund or stipend is processed. The date changed, time changed, and the user who made the change are audited.
- Payee changes are audited for subsidiaries.

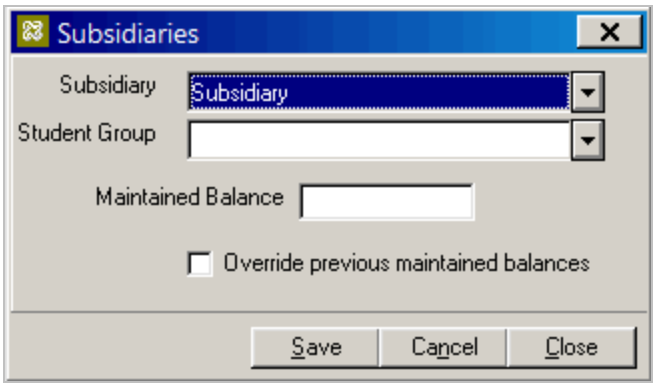
- Payee information for a stipend can be edited regardless of the fund source associated with the stipend. The payee changes are audited for all stipends.
- Your ability to edit a payee for a refund is dependent on the fund source associated with the refund. The payee changes are audited only for the fund sources that allow the payee to be changed.
- You can sort on different columns of the grids available in the Process Refunds/Stipends wizard.
- A student account administrator can define that the Reference information is printed on the check, below the address, or on the stub, or in both places.
- A student account administrator can view the ID of the user who scheduled the refund/stipend using the Ledger Card, Transaction Detail button.
- CampusNexus Student stores the user ID of the user who scheduled the stipend so that it does not get overwritten by the user ID of the user who posted the stipend.

Configure Balance

When a subsidiary is created, there is no maintained balance associated with it because this must be done at the student level. You can configure a maintained balance individually for a student or in batch for multiple students in a student group. The maintained balance is entered in the form of a credit balance. This balance is the minimum balance the student must maintain in the subsidiary, otherwise, the student is billed the difference between the current balance and the Maintained Balance. This amount can be different on a per-student basis.

To configure a maintained balance:

1. Navigate to **Daily** > **Student Accounts** > **Subsidiaries** > **Configure Balance**. The Subsidiaries form is displayed.



2. Select a **Subsidiary**.
3. In the **Maintained Balance** field, enter the dollar amount that must be maintained in the subsidiary.
4. Select the appropriate **Student Group**.
5. Select **Override Previous Maintained Balances** to change the maintained balance amount for any student in the student group who previously had a maintained balance. If you do not select this check box, students who already have a maintained balance in the selected subsidiary are not affected by any changes to maintained balances.
6. Click **Save** to update the maintained balance and click **OK** to confirm this action.
7. Click **Close** to close the form.

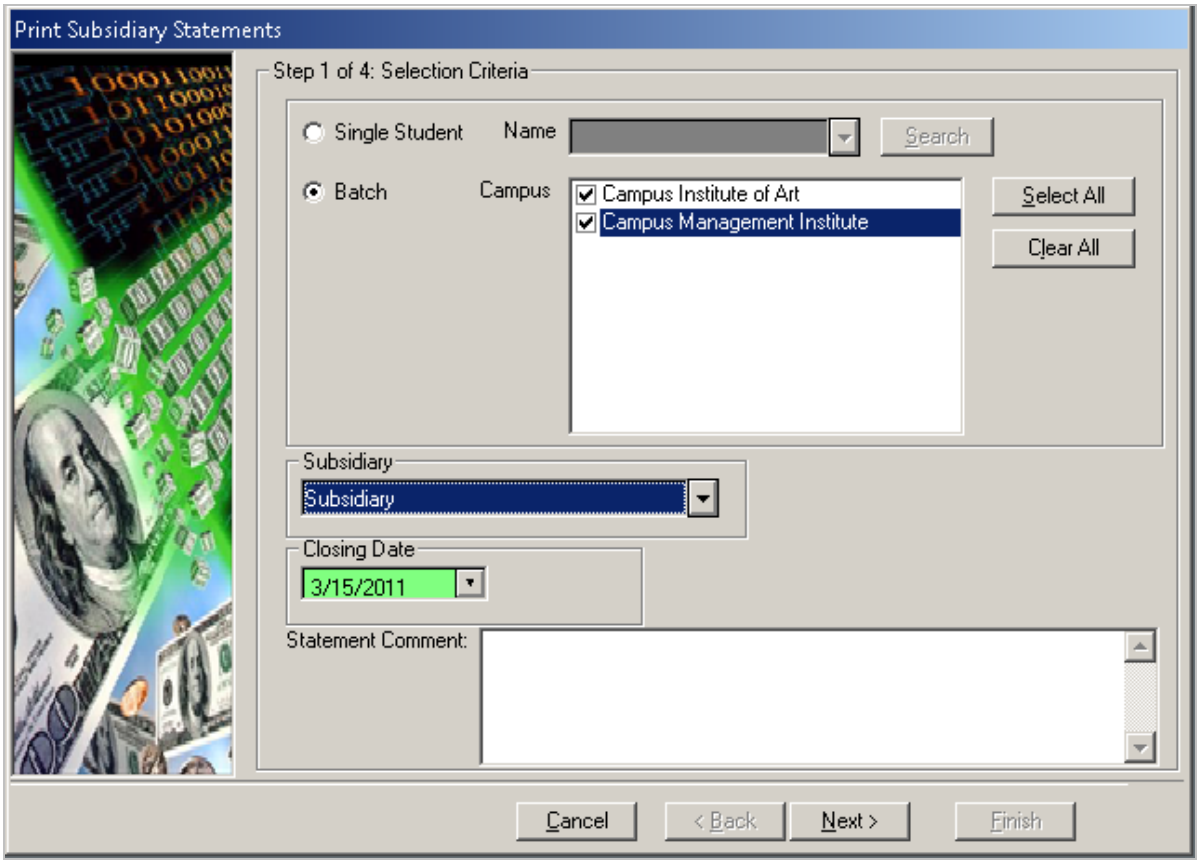
Subsidiary Statements

CampusNexus Student can be used to print subsidiary statements in batches or for individual students. Various filtering criteria are available to select the students for whom subsidiary statements will be printed.

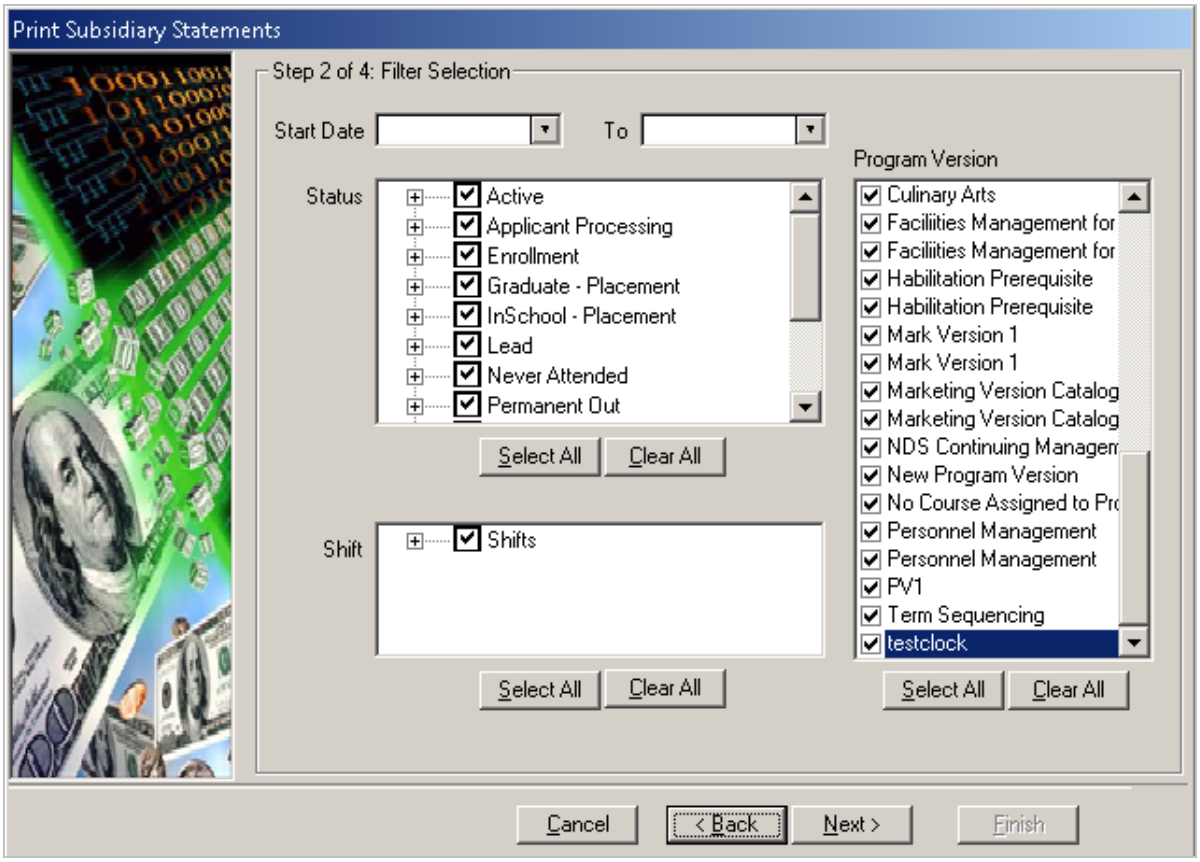
Note: To protect student privacy, staff member and staff groups are prevented from viewing, printing, or exporting student Social Security Numbers (SSNs) unless the system administrator has set up the necessary security rights to allow these functions. See Social Security Number Privacy for security rights instructions.

To print subsidiary statements:

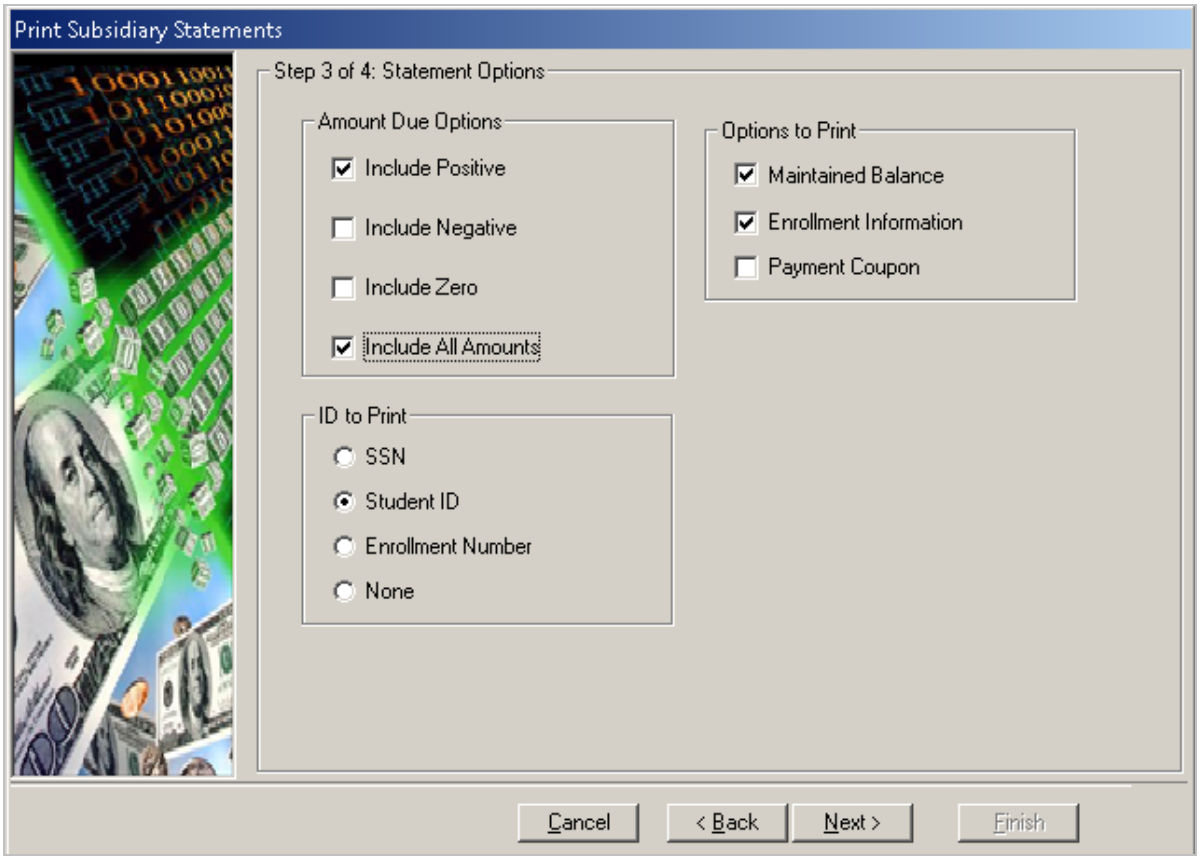
1. Navigate to **Daily > Student Accounts > Subsidiaries > Subsidiary Statements**. Step 1 of 4: Selection Criteria of the Print Subsidiary Statements wizard is displayed.



2. Select a **Single Student** or **Batch** for which to print statements.
3. In the **Campus** box, select one or more campuses for which to print statements. Use the **Select All** and **Clear All** buttons to select or clear all check boxes, respectively.
4. Select the **Subsidiary** account for which the statement will be generated.
5. Enter or select the **Closing Date**. After you print statements the first time, CampusNexus Student will add one month to the date and use it as a default date the next time you run the Print Subsidiary Statements wizard.
6. Enter an optional **Statement Comment** to appear at the bottom of each printed statement. You can prevent users from editing this field.
7. Click **Next**. Step 2 of 4: Filter Selection of the wizard is displayed.



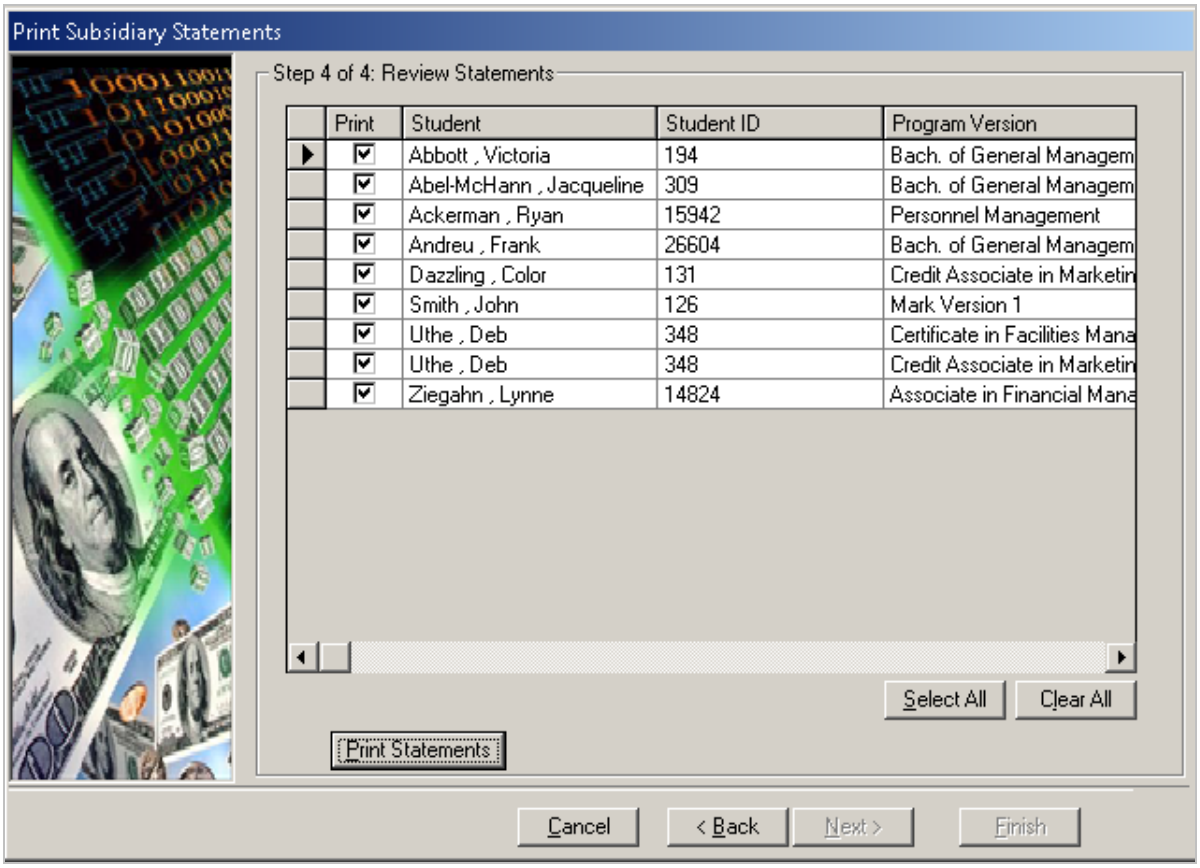
8. If applicable, select a **Start Date** and **To** date to specify a date range for your selection.
9. Select the student **Status** criteria. Click **Select All** to select all student school statuses or **Clear All** to clear previous status selections. Or, select statuses individually using the check boxes. Click the plus signs to expand the status categories to see more status detail. You must select at least one school status for statements to be printed.
10. Select the **Shift(s)** for which statements are to be printed. Use **Select All** to select all shifts or **Clear All** to clear previously selected shifts. Click the plus signs to expand the list items to see more detail. You must select at least one shift for statements to be printed.
11. Select the **Program Version** criteria. Click **Select All** to select all program versions or **Clear All** to clear previous program version selections. Or, select program versions individually using the check boxes. You must select at least one program version for statements to be printed.
12. Click **Next**. **Step 3 of 4: Statement Options** of the wizard is displayed.



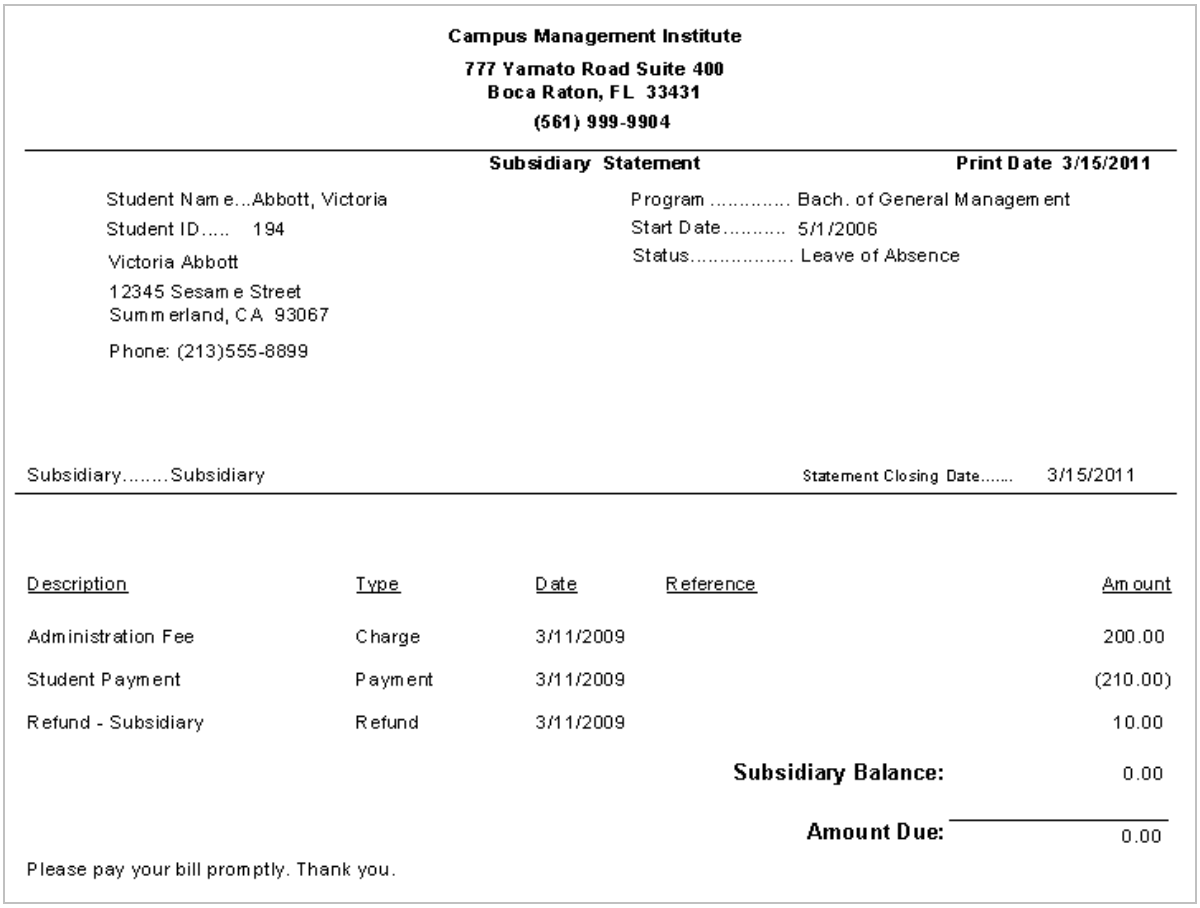
13. Select the **Statement Options** that you would like printed.

    Note: If the **Payment Coupon** option is selected, the configured **Remittance Address** will be used on the return coupon.

14. Click **Next**. In Step 4 of 4: Review Statements, you can review the listing of students for whom the statements will be printed. Use the check boxes in the **Print** column to include/exclude individual students from the listing. Use the **Select All** and **Clear All** buttons to assist you in your selection.



15. Click **Print Statements.** The report form will start and load a preview of the statements into the Report Viewer. From there, you may review and print the statements as needed. An example of a Subsidiary Statement is shown below.



Campus Management Institute
777 Yamato Road Suite 400
Boca Raton, FL 33431
(561) 999-9904

Subsidiary Statement **Print Date 3/15/2011**

Student Name...Abbott, Victoria
Student ID..... 194
Victoria Abbott
12345 Sesame Street
Summerland, CA 93067
Phone: (213)555-8899

Program ..... Bach. of General Management
Start Date..... 5/1/2006
Status..... Leave of Absence

Subsidiary.....Subsidiary — Statement Closing Date..... 3/15/2011

Description	Type	Date	Reference	Amount
Administration Fee	Charge	3/11/2009		200.00
Student Payment	Payment	3/11/2009		(210.00)
Refund - Subsidiary	Refund	3/11/2009		10.00
			Subsidiary Balance:	0.00
			Amount Due:	0.00

Please pay your bill promptly. Thank you.

16. After you view and print your statements, close the Report Viewer. The **Print Subsidiary Statements** wizard is still open in your work area.
17. Select the appropriate answer to the question **'Did statement(s) print okay?'**.
    - If your answer is **Yes**, the wizard closes when you click **Finish**.
    - If your answer is **No**, the wizard returns to **Step 1 of 4: Selection Criteria**.

Schedule Refunds/Transfer Balances

Institutions need to refund or transfer any credit balance from the subsidiary ledger when a student finishes a term, leaves the institution, or the student's housing status changes.

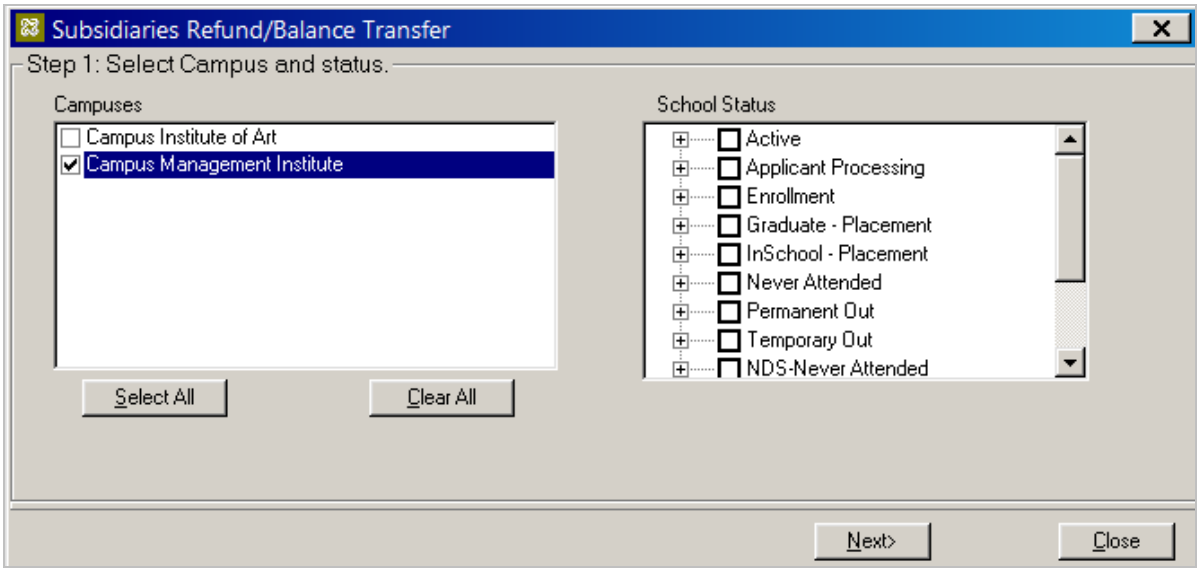
If the subsidiary balance is on a graduate status enrollment and the student has another enrollment with a future or active status when the student's subsidiary is loaded into the grid, the balance is transferred by default. This also applies to NDS statuses.

You can schedule subsidiary refunds for students with a credit balance or transfer the balance to another enrollment for a batch of students or for individual students.

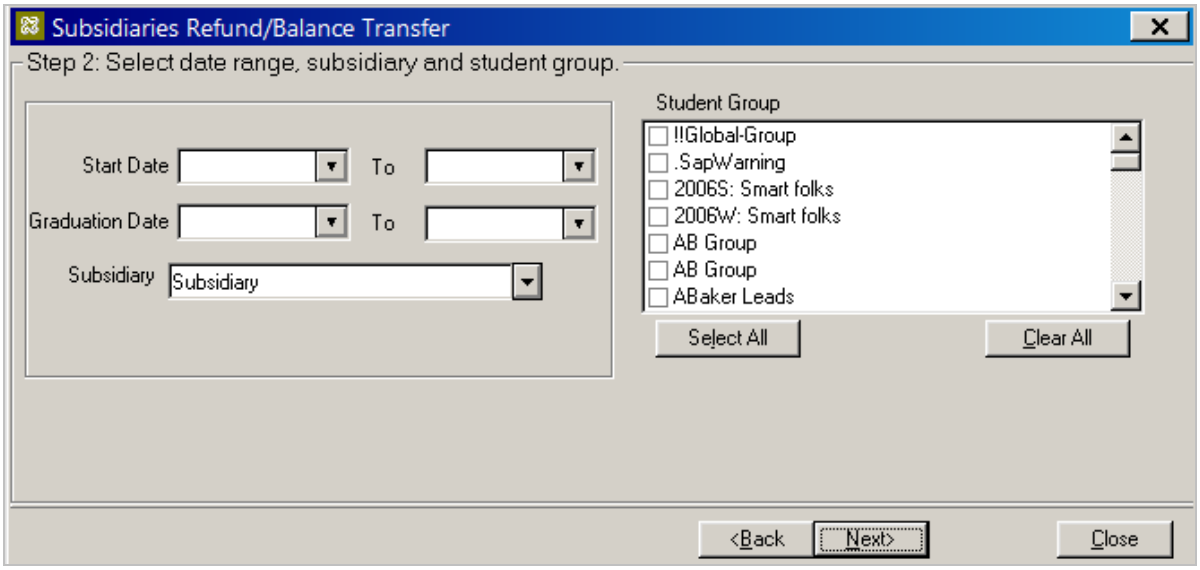
- To post refunds or transfer balances for groups of students, see Batch Process.
- To post refunds or transfer balances for individual students, select a student, navigate to **View** > **Student Accounts** > **Subsidiary**, select a subsidiary, and click **Post Refunds**. For more information, see Post Refunds.

Batch Process

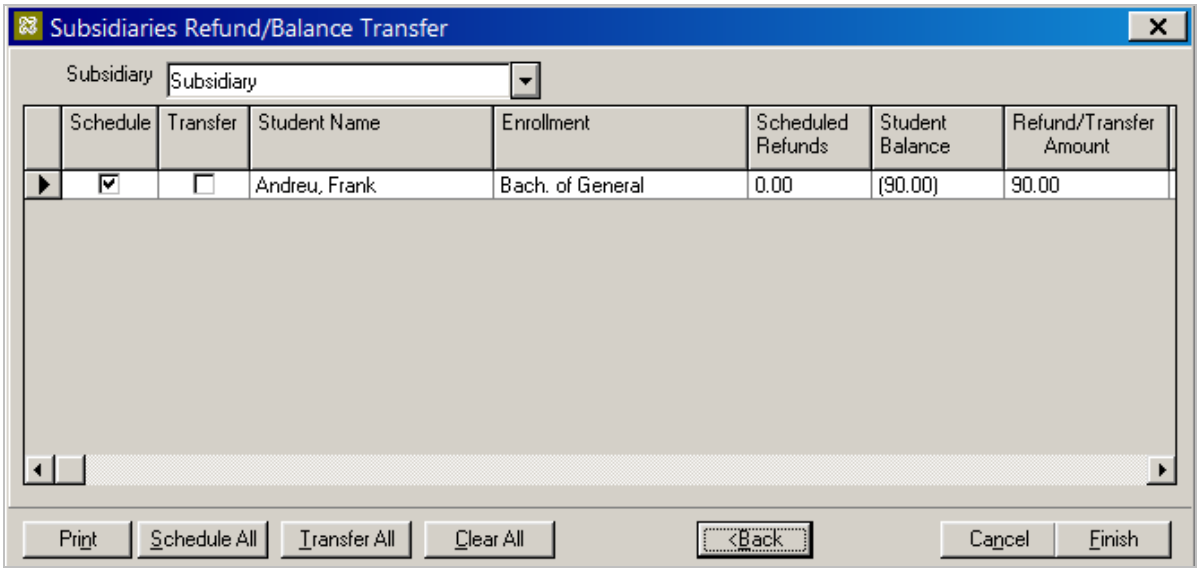
1. Select **Daily** > **Student Accounts** > **Subsidiaries** > **Schedule Refunds/Transfer Balances**. The Subsidiaries Refund/Balance Transfer form is displayed.



2. Select the **Campuses** and **School Statuses**.
3. Click **Next**. The Subsidiaries Refund/Balance Transfer Step 2 form is displayed.



4. Select a **Start Date** range or a **Graduation Date** range.
5. Select a **Subsidiary** to process.
6. Select the **Student Group**.
7. Click **Next**. Students with a credit balance in the selected subsidiary are listed. Select any or all students to receive the refund or transfer the balance.



Note: The default selection is 'Transfer' for students with a credit balance on a Grad enrollment and a Future or Active enrollment (including Non-Degree Seeking) outside the enrollment gathered by the selection criteria.

8. Click **Finish** to schedule the refund and transfer funds for the selected students.

   When a balance is transferred, the subsidiary ledger for the enrollment the balance was transferred to will contain one adjustment transaction in the amount that was transferred. The adjustment is posted using the default bill code configured for the selected subsidiary ledger.

Audit Features

The audit features for Student Accounts include:

- CampusNexus Student stores the name of the payee on each refund record, stipend record, and subsidiary refund so that it can be retrieved for reporting purposes.
- CampusNexus Student audits changes to the payee for refunds and stipends. Auditing occurs from the time the refund or stipend is scheduled to the time the refund or stipend is processed. The date changed, time changed, and the user who made the change are audited.
- Payee changes are audited for subsidiaries.
- Payee information for a stipend can be edited regardless of the fund source associated with the stipend. The payee changes are audited for all stipends.
- Your ability to edit a payee for a refund is dependent on the fund source associated with the refund. The payee changes are audited only for the fund sources that allow the payee to be changed.
- You can sort on different columns of the grids available in the Process Refunds/Stipends wizard.
- A student account administrator can define that the Reference information is printed on the check, below the address, or on the stub, or in both places.
- A student account administrator can view the ID of the user who scheduled the refund/stipend using the Ledger Card, Transaction Detail button.
- CampusNexus Student stores the user ID of the user who scheduled the stipend so that it does not get overwritten by the user ID of the user who posted the stipend.

Post Payments

You can post payments from students, third parties, and other fund sources, or apply payments to open items in the student ledger or subsidiary ledger. The Post Payments process can handle scheduled payments from various fund sources. Payments can be linked to enrollments, terms, and financial aid payment periods. See also Process Electronic Drafts and Posting Cash/Other Payment Plans (Reamortizing future payments).

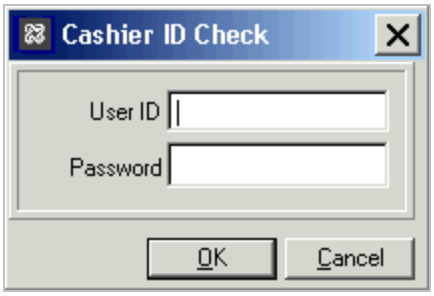
Use the Post Payments form to post a scheduled payment or unschedule a payments before they are posted. See Campus Financial Aid - Auto Stipends for information regarding Title IV funds and associated waivers.

To post payments:

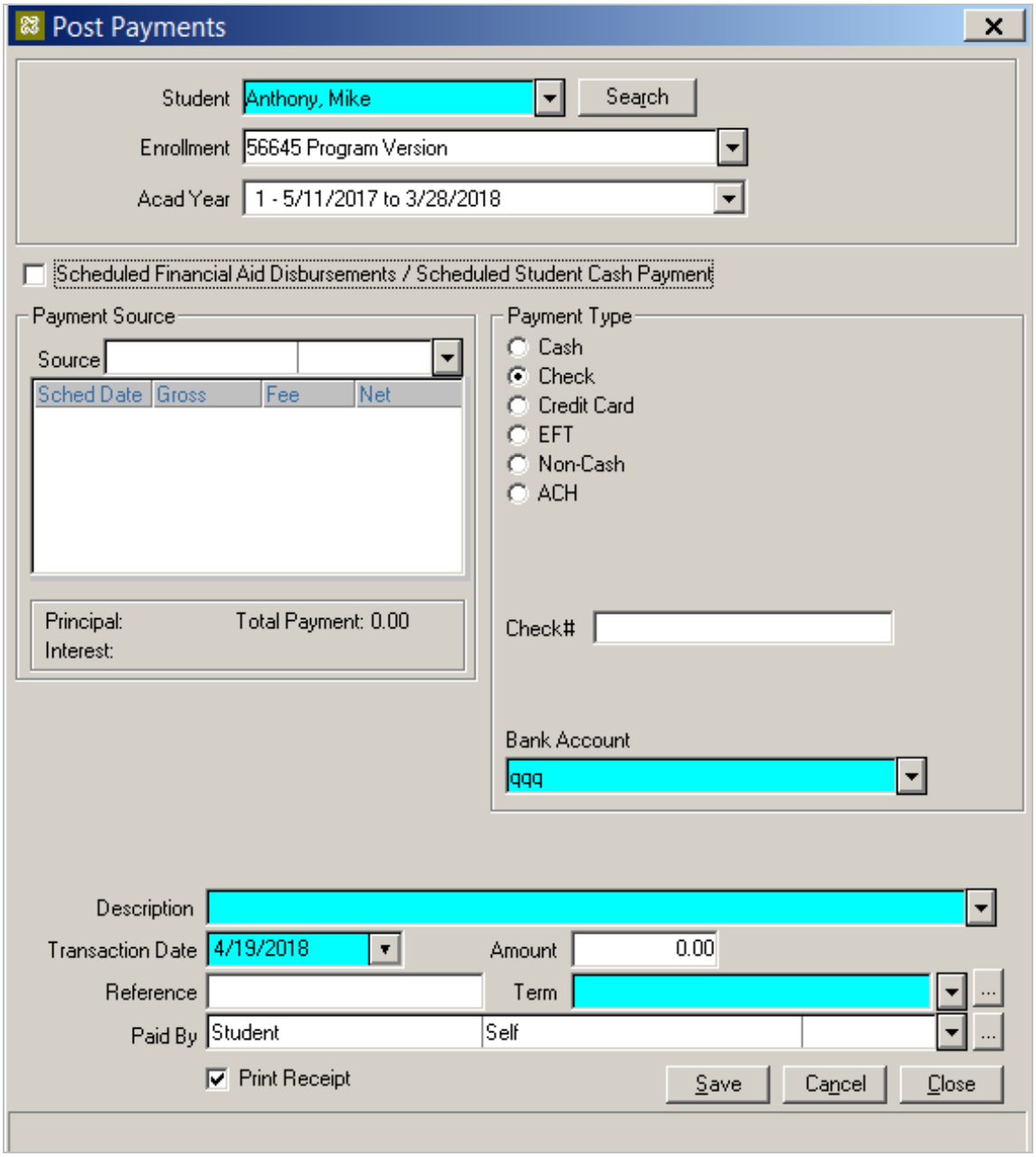
1. Click **Post Payments** on the student's ledger card.
   - OR -
   Navigate to **Daily > Student Accounts > Post Payments**. The Post Payments form is displayed.

   To post payments or charges for a subsidiary, click **Post Payments** on the Student Subsidiaries form or navigate to **Daily > Student Accounts > Post Payment**. For more information, see To post payments or charges to a subsidiary.

2. If the Cashiering feature is enabled, only users defined as cashiers can post payments. The Cashier ID Check form is displayed.



   Enter the cashier **User ID** and **Password**, and click **OK**. CampusNexus Student validates the information and, if a match is found, proceeds to the Post Payments form.



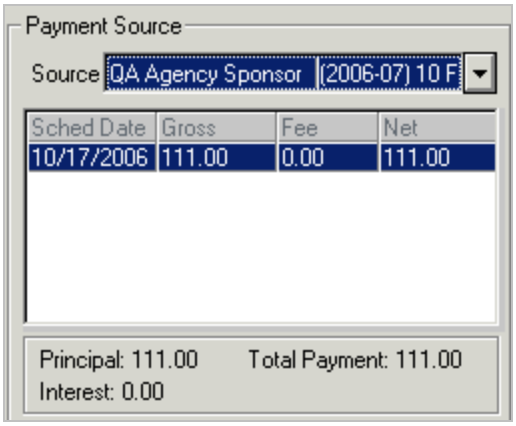
3. Select the **Student** for whom the payment applies. Select from the list of recent students or search for the student.
4. The **Applicant/Enrollment** field is populated automatically. Accept the default or choose another value from the list.
5. Select the **Academic Year** to which the payment applies.
6. The **Payment Period** combo box is displayed for program versions that can use it (program versions with academic calendars 1, 5, and 6). When Academic Year is selected, this combo box dynamically filters out academic years other than the selection. If the Academic Year field is cleared, all payment periods are available for selection. If no payment periods exist, the combo box is not displayed.

Conversely, when Payment Period is selected, the Academic Year is populated automatically. If Academic Year is modified after Payment Period is selected, this field is cleared and validated during save.

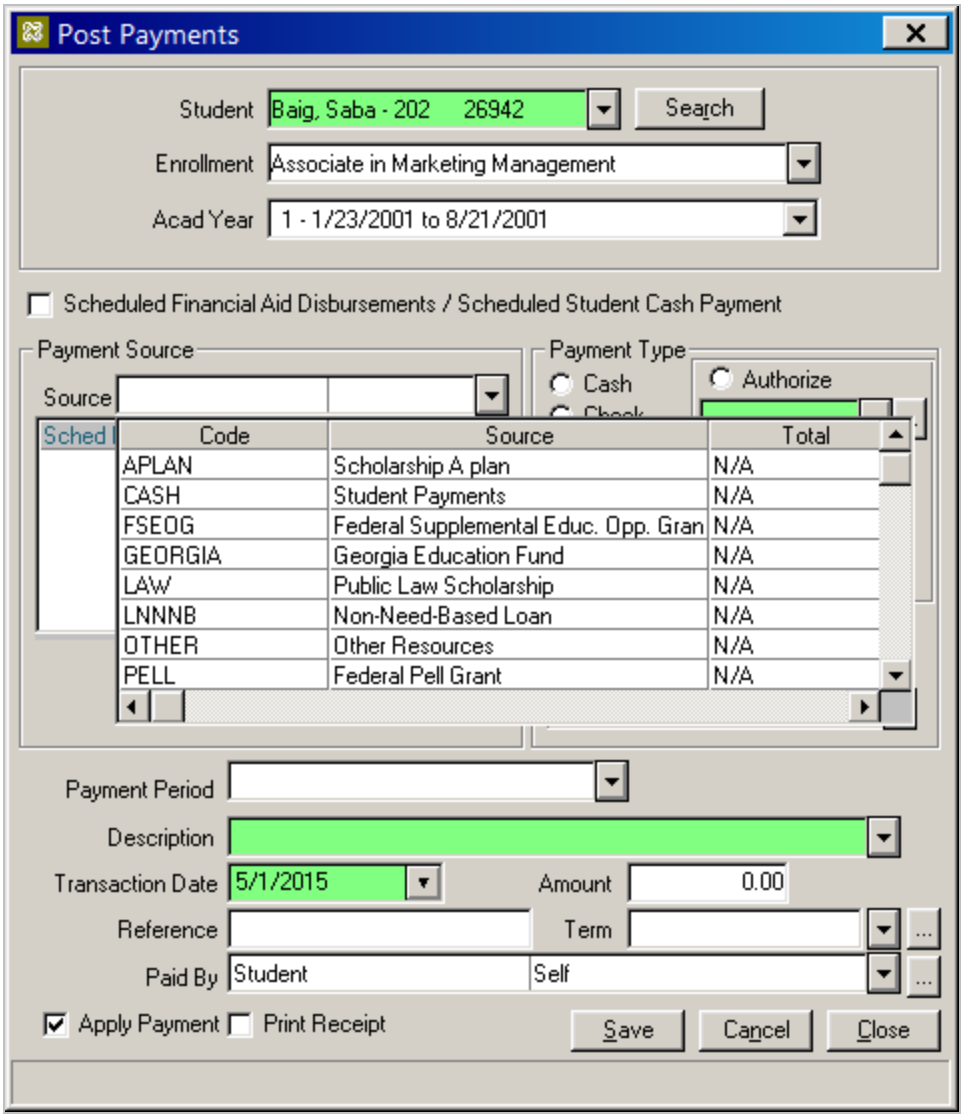
The notation for Payment Periods is `A<n>|P<m>` where `<n>` is the academic year sequence number and `<m>` is the payment period sequence number.

7. If the incoming payment is scheduled, select **Scheduled Financial Aid Disbursements/Scheduled Student Cash Payment**. The student's scheduled (unpaid) financial aid fund sources appear in the **Source** combo box.
   - If you select a fund source that is deactivated for an award year and campus, a message is displayed in red and you cannot continue processing the payment.
   - If any of the award year's fund sources are active, the fund source is displayed as a Source option.

   When a fund source and award year is selected from the Source list, the following information is displayed under the Source field.



8. If the **Scheduled Financial Aid Disbursements / Scheduled Student Cash Payment** check box remains cleared, a list of fund sources is displayed for selection in the **Source** list.



When you select a fund source, the Unscheduled Payment form is displayed, and you can schedule a payment to be posted. Fund sources are listed only when the Allow Posting Directly to Ledger Card option is enabled to allow manual posting.

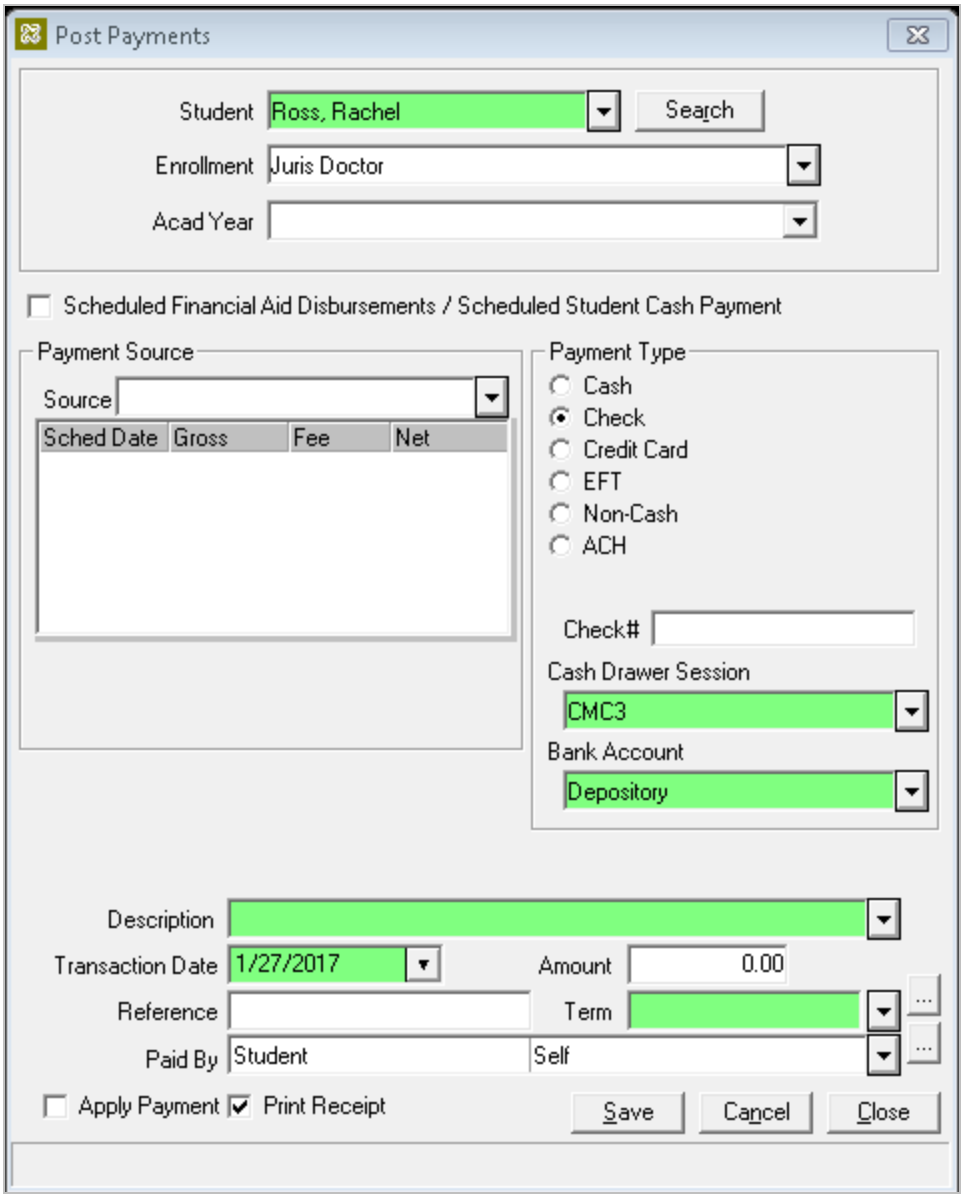
9. Select a **Payment Type**. The options are:

   - Cash
   - Check (default) - Enter a Check # when you select this option.
   - Credit Card
   - EFT (Electronic Funds Transfer)
   - Non-Cash (scholarships)
   - ACH

10. Select the **Cash Drawer Session**. Refer to Cash Drawers for detailed information.

    Note: If CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll and Cashiering is enabled, you can select a bank account to associate to the payment. All active bank accounts appear in the **Bank**

Accounts field drop-down list. This required field automatically populates with the default bank account for the selected payment type.



11. Select or enter the purpose of the payment in the **Description** field.
12. Select or enter the **Transaction Date** of the payment. This is the date that is considered in preparing the bank deposit.
13. Enter the **Amount** of the payment. You must enter a decimal point to separate pennies from dollars. If the amount is to be a debit to the student's account, enter a minus sign (hyphen) before the amount.
14. Optional: Enter any **Reference** data that you use to mark a payment.
15. Click or to select the **Term** to which this payment applies. (Whether you must select a term depends on a system setup flag controlled by your system administrator.)
16. In the **Paid By** list box, select the person who is making the payment. This list comes from the list of addresses in

the student's file.

If the person making the payment is not on the list, click . The Addresses form is displayed. Enter the new person and address. You can then select that person or entity as the "Paid By" option.

17. Select **Apply Payment** to apply the payment to a specific charge or multiple charges on the student's ledger. Refer to Payment Adjustments and Apply Payments to Charges for more information.

    Note: This option is available only if 'Auto Apply Using Hierarchy' is selected for 'How Should Payments Be Applied?' in Setup > Campus Locations > Add/Edit Campus > Accounting (tab).

18. Select **Print Receipt** to provide the student with a paper receipt for this transaction.

19. Click **Save**. CampusNexus Student checks the payment data and displays a message if editing rules have detected any problems. For example, the transaction date may be invalid if it is earlier than the earliest permitted transaction date.

    Note: If the fund source has been set up to apply payments to interest before principal, CampusNexus Student applies the payment to the interest of the selected scheduled payment followed by the principal. Additionally, CampusNexus Student applies overages to the interest of subsequent payments followed by the principal until the overage is exhausted.

20. Click **Cancel** to stop the posting transaction.

21. Click **Close** to close the form.

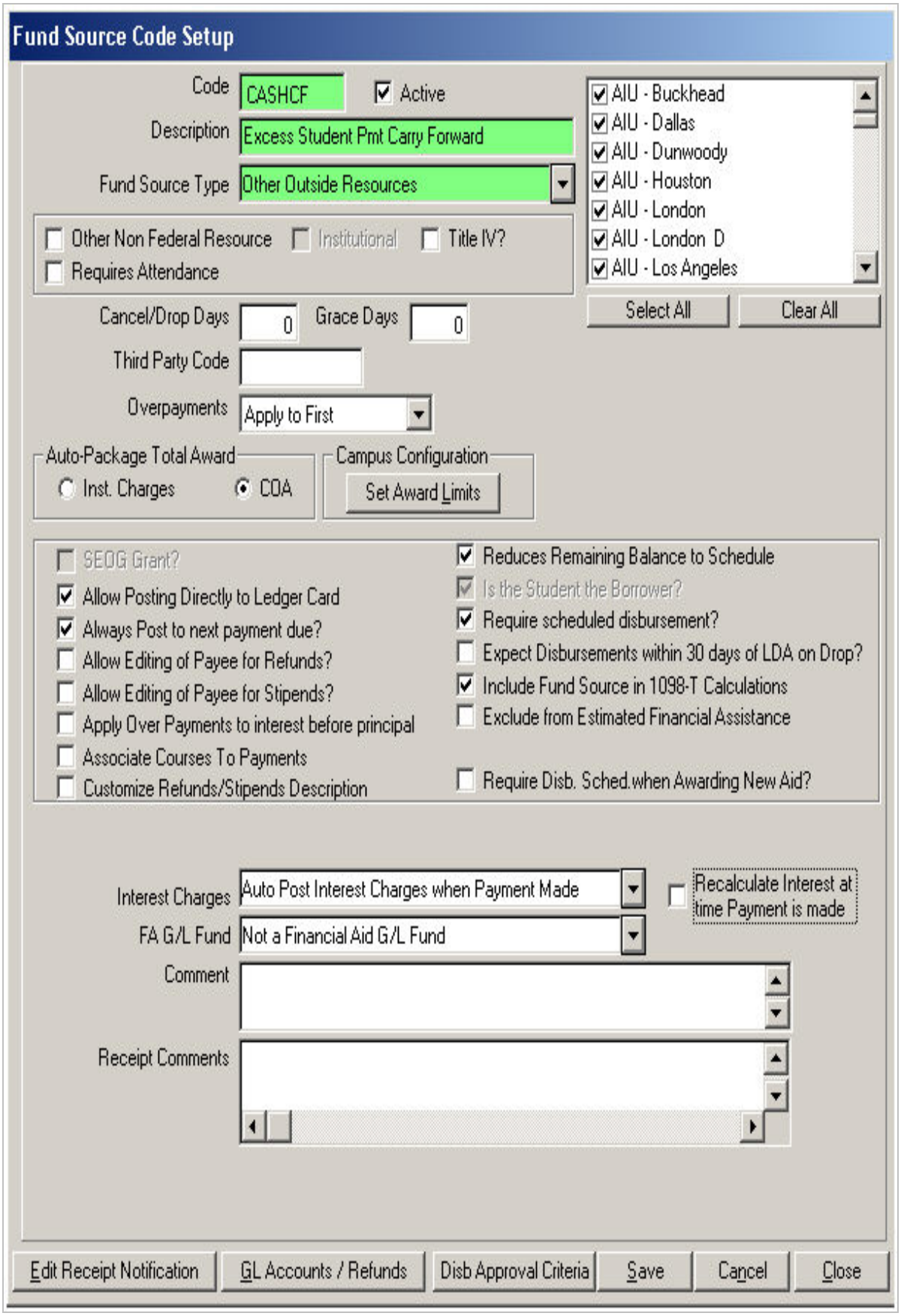
Posting Cash/Other Payment Plans (Reamortizing future payments)

Reamortizing future scheduled payments is necessary when you need to post a payment for a student and the amount paid is different than the expected amount. This includes receiving a scheduled payment that is less or more than the expected payment.

When you post a payment with an amount that is different than the scheduled payment amount, CampusNexus Student reamortizes and rebuilds the student's future payment schedule.

To have the student's payment plan reamortize and rebuild the remaining scheduled payments correctly when a payment is received that is different (over or under) than the expected scheduled payment, the following settings are necessary on the Fund Source Code Setup form.

1. The student's fund source type selected is **Cash-Other**.
2. The **Auto Post Interest Charges when Payment Made** is selected from the Interest Charges drop-down list.
3. Clear the **Recalculate Interest at time payment is made** check box or confirm that it is NOT selected.
4. Clear the **Apply over Payments to interest before principal** check box or confirm that it is NOT selected.
5. Select **Apply to First** for the Overpayments list.


Fund Source Code Setup
Code
CASHCF
Active
Description
Excess Student Pmt Carry Forward
Fund Source Type
Other Outside Resources
Other Non Federal Resource
Institutional
Title IV?
Requires Attendance
AIU - Buckhead
AIU - Dallas
AIU - Dunwoody
AIU - Houston
AIU - London
AIU - London D
AIU - Los Angeles
Select All
Clear All
Cancel/Drop Days
0
Grace Days
0
Third Party Code
Overpayments
Apply to First
Auto-Package Total Award
Inst. Charges
COA
Campus Configuration
Set Award Limits
SEOG Grant?
Allow Posting Directly to Ledger Card
Always Post to next payment due?
Allow Editing of Payee for Refunds?
Allow Editing of Payee for Stipends?
Apply Over Payments to interest before principal
Associate Courses To Payments
Customize Refunds/Stipends Description
Reduces Remaining Balance to Schedule
Is the Student the Borrower?
Require scheduled disbursement?
Expect Disbursements within 30 days of LDA on Drop?
Include Fund Source in 1098-T Calculations
Exclude from Estimated Financial Assistance
Require Disb. Sched.when Awarding New Aid?
Interest Charges
Auto Post Interest Charges when Payment Made
Recalculate Interest at time Payment is made
FA G/L Fund
Not a Financial Aid G/L Fund
Comment
Receipt Comments
Edit Receipt Notification
GL Accounts / Refunds
Disb Approval Criteria
Save
Cancel
Close

This configuration keeps the interest that is charged to the student consistent with what was initially calculated when the payment plan was first built.

6. **Post a Payment in Sequence for Fund Source Type of Cash/Other**

   When posting a payment against a payment schedule for a fund source type of cash/other, and the payment is for a future payment rather than the current payment or is a past due payment, CampusNexus Student does not allow the payment to process.

   Note: This doesn't mean that students cannot prepay. Early payments are still permitted and applied to the current payment in the payment plan. A computation of accrued interest is stored with the student's payment plan whenever the actual payment amount received is less than the expected interest payment amount, where the Accrued Interest Amount = (Total Accrued Interest - Actual Payment Received) + Previous Accrued Interest Amount. At the time a payment is received, any outstanding accrued interest amount is fulfilled before applying the payment to any outstanding interest or principal amounts.

   Example: A student owes $100 in accrued interest but makes a payment before the next scheduled payment is due (the student is at the Bursar's office even though the student knows that $250 is due next week). The interest accrued for this payment schedule is $40. The total Accrued Interest Amount = (80-140) + 40 = 60 + 40 = $100.00. Therefore, $100 is the student's accrued interest amount. However, even though the student just paid $140, CampusNexus Student is only displaying that the student paid $100 since $40 equals the accrued interest amount and, even though this amount is stored in CampusNexus Student, it is not displayed for the student or bursar/FA advisor to view (as $100 being applied to the accrued interest amount).

   Additionally, the interest charge posted to the student's ledger will contain both the accrued and payment interest received in this transaction. Therefore, using the example above, $100 + payment interest for a total of X will be posted to this student's ledger.

   As mentioned above regarding a past due payment, at the time of a late payment, the past due scheduled payment records will be zeroed out. This is done to ensure that any refunds can be accounted for accurately. The total amount received less any accrued interest payment will be applied to the current payment in the payment plan with the amounts applied to both interest and principal payment amounts.

   Again, from the example given above, the total amount received from this student of $140 - $100 (the accrued interest) = $40 which will be applied to the current payment in the payment plan (with the amounts applied to both interest and principal payment amounts for this student).

7. If the **Restrict student scheduled payments based on Graduation date** check box is selected under Setup > Campus Locations > Add/Edit (button) > Allow (tab), the last scheduled payment does not go beyond the student's graduation date.

   Note: When configuring a payment schedule for a fund source type of cash/other and the payment frequency is set to the number of days between payments, the number cannot exceed 365 days. See Cash-Other Source Form.

Audit Features

The audit features for Student Accounts include:

- CampusNexus Student stores the name of the payee on each refund record, stipend record, and subsidiary refund so that it can be retrieved for reporting purposes.
- CampusNexus Student audits changes to the payee for refunds and stipends. Auditing occurs from the time the refund or stipend is scheduled to the time the refund or stipend is processed. The date changed, time changed, and the user who made the change are audited.
- Payee changes are audited for subsidiaries.

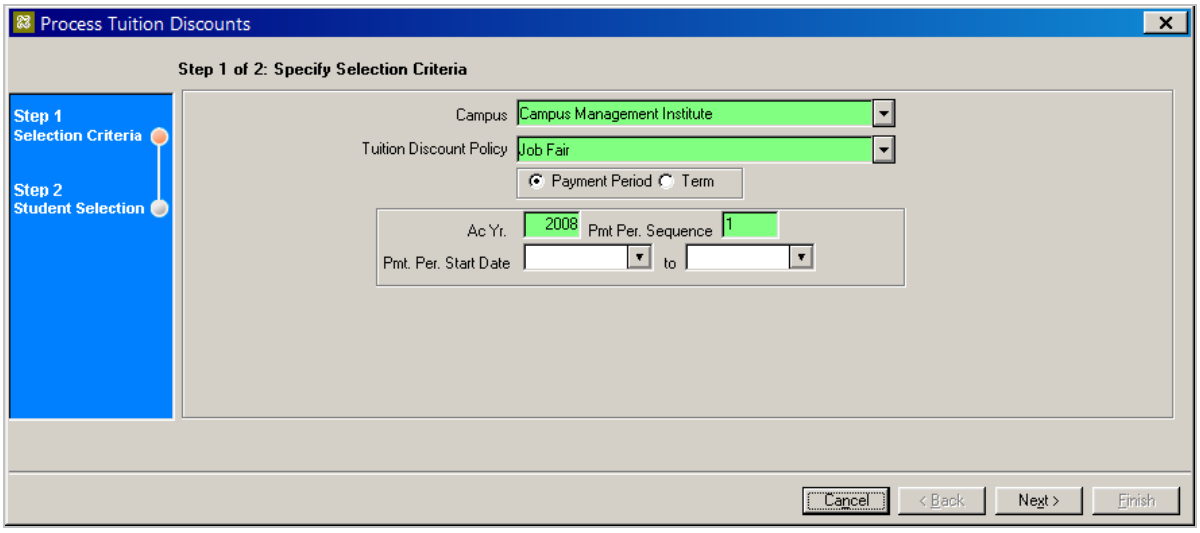
- Payee information for a stipend can be edited regardless of the fund source associated with the stipend. The payee changes are audited for all stipends.
- Your ability to edit a payee for a refund is dependent on the fund source associated with the refund. The payee changes are audited only for the fund sources that allow the payee to be changed.
- You can sort on different columns of the grids available in the Process Refunds/Stipends wizard.
- A student account administrator can define that the Reference information is printed on the check, below the address, or on the stub, or in both places.
- A student account administrator can view the ID of the user who scheduled the refund/stipend using the Ledger Card, Transaction Detail button.
- CampusNexus Student stores the user ID of the user who scheduled the stipend so that it does not get overwritten by the user ID of the user who posted the stipend.

Process Tuition Discounts

Use the Process Tuition Discounts batch process to post tuition discounts for student batches associated with a campus.

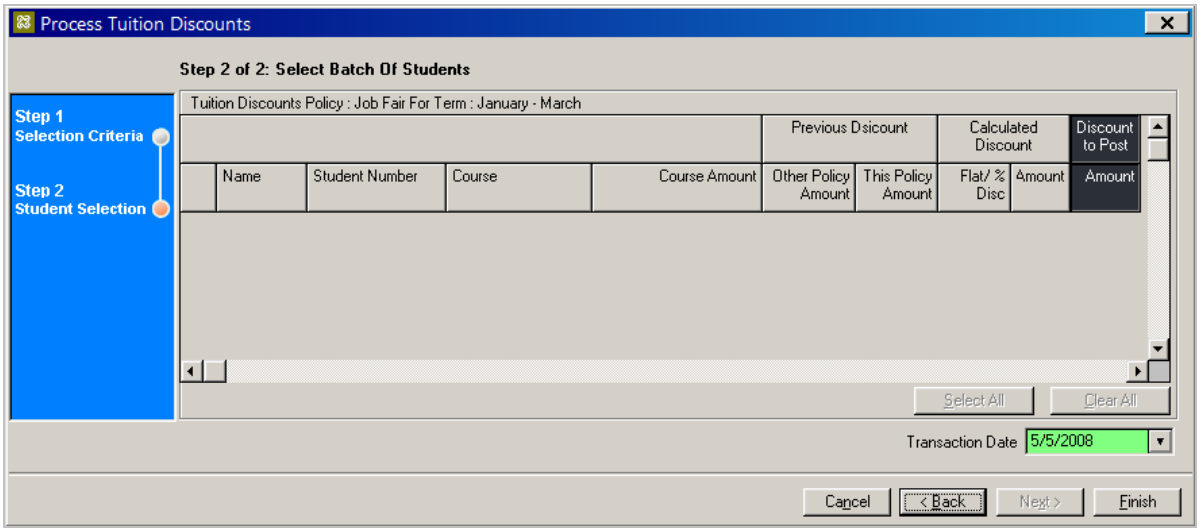
To post tuition discounts using the Process Tuition Discounts batch process:

1. Navigate to **Daily > Student Accounts > Process Tuition Discounts**. Step 1 of the Process Tuition Discounts batch process is displayed.



2. Select a **Campus**. Based on the campus selected, the tuition discount policies available for the campus are displayed in the **Tuition Discount Policy** list.
3. Select the **Tuition Discount Policy**.
4. Select the **Term** or **Payment Period** for which you want to process the selected discount policy.

   If you select Payment Period, specify the following criteria to search for the associated tuition discounts:
   - **Ac. Yr.** - Academic year
   - **Pmt Per. Sequence** - Payment period sequence
   - **Pmt. Per. Start Date** - Payment period start dates
5. Click **Next**. Step 2 of the Process Tuition Discounts batch process is displayed.



6. For each student in the campus who is eligible for the tuition discount policy, the following information is displayed:

Field Descriptions

Field	Description
Name	Name of the student.
Student Number	Number of the student.
Course	If the billing method for the tuition discount policy is **By Course**, the name of the course in which the student is currently enrolled is displayed. If the billing method for the tuition discount policy is **By Term**, the **Course** column has a **Details** button. Click this button to display all the courses taken by the student in the selected term, which qualify for the tuition discount policy.
Course Amount	The amount charged for the course.
Previous Discount - Other Policy Amount	The discount amount that has already been posted for the student according to a policy other than the tuition discount policy.
Previous Discount - This Policy Amount	The discount amount that has already been posted for the student according to the tuition discount policy.
Calculated Dis-count - Flat/% Disc.	The percentage of discount as defined in the tuition discount policy. In case the discount amount for the tuition discount policy has to be calculated on a flat rate basis, this column will be blank. **Note**: It is not recommended to change discount percentages or flat rates on a Tuition Dis-count Policy once discounts have been posted for a given policy.

Field	Description
Calculated Discount - Amount	The amount of tuition discount that should be paid to the student based on the tuition discount policy. **Note**:It is not recommended to change discount percentages or flat rates on a Tuition Discount Policy once discounts have been posted for a given policy.
Discount To Post - Amount	The difference between the amounts in the **Calculated Discount** and **Previous Discount** headings. The Discount To Post will be zero when 100% of the course charge has already been used for tuition discounts. This column can be edited.

7. Select the student(s) for whom you want to post the tuition discounts. Click **Select All** to select all students in the list. Click **Deselect All** to clear all students.

   Note: If a student cannot be selected, it is because the course is in a Drop status and you cannot select the course for posting.

8. If required, edit the discount amount to post for students in the corresponding **Amount** column (under **Discount To Post**).

9. Specify the **Transaction Date** to post the tuition discounts.

   Note: When automated billing is in use with the Post Transaction Details option selected, the **Transaction Date** for each tuition discount in the payment period will be equal to the course section date.

10. Click **Finish** to post the tuition discounts. After you confirm to post the discounts, the process ends.

California STRF Processing

The California's Student Tuition Recovery Fund (STRF) was designed by California's Bureau for Private Postsecondary and Vocational Education to offset economic losses experienced by the State. The fee is based on the amount of tuition charged and is processed every term.

CampusNexus Student users can automatically gather California students who were exempt from paying the STRF, or bill the STRF fee to those students who were not exempt. You can collect non-exempt students via reporting, generate a charge for the appropriate group of students based on California regulations, and batch-post the charge to the students' ledger cards.

Note: This option is only available if any campus in the active database lists "CA" as the State in the Address tab of the Campus Information form (under Setup > Campus Locations > Campus > Address tab).

To process students for STRF:

1. Navigate to **Daily > Student Accounts > California STRF Processing** to activate the STRF wizard.
2. Select a **Term**, **Enrollment Date** range, percentage of tuition to charge (in the **Dollar amount per $1000.00 of Tuition Billed** field), and a **Transaction Code** to associate with the STRF fee.
3. Enter a reference designation in the **Reference** field to identify this process batch (or accept the default) and click **Next**.
4. The wizard displays all student records that meet these criteria, fees already charged, and fees that are to be charged. You can add and subtract students from this list, edit proposed fee amounts, and print the list.
5. Click **Finish**. CampusNexus Student displays a confirmation message indicating that a fee of n% has been posted to the students' ledger cards, identified by the specified Transaction Code. The Proposed Fee Amount column displays the STRF fee amount that is calculated. If the students have already been charged a STRF fee for the selected time frame, CampusNexus Student factors that amount into the calculation and displays an appropriate charge or credit adjustment in the Proposed Fee Amount column.

Title IV Credit Balance

When a Title IV credit balance occurs, an institution has 14 days to return the credit balance to the student (parent for PLUS) unless the institution has obtained authorization to hold credit balances.

When the award year has expired (for Title IV Grants and Perkins), or the loan period has expired (for FFEL and Direct Loans), institutions must return the credit balance within 14 days, regardless of whether the institutions obtained authorization to hold credit balances.

Authorization Changes to Trigger Credit Balance Reevaluation

Stipends can adhere to the fund source order specified by the user and be scheduled against the fund source order configured for Title IV and Non-Title IV fund sources.

The Title IV credit balance must use only Title IV fund sources from the configuration to assign to a stipend. Overall, the credit balance for Non-Title IV and Title IV items must use fund sources in the order configured to assign to a stipend. Stipend amounts can be assigned to only the available amounts left for the fund source (amount disbursed minus existing refunds and stipends, which may be scheduled or posted). Stipends can be created from Title IV calculations and from overall calculations.

Multiple fund sources can be assigned to satisfy a credit balance.

Example

A credit balance is created for $1756. The fund source order for the stipend is Pell, Sub, and Unsub.

The available amounts remaining on each fund source are:

- Pell = 432
- Sub = 1000
- Unsub = 3500

The stipends created would include the remaining amounts for Pell and Sub ‘plus’ an Unsub of 324.

If there are not enough fund sources selected for assigning the stipend, a credit balance will remain.

Generating Stipends with a Non-Title IV Credit Balance Remaining

If a student has a credit balance consisting of Title IV or Non-Title IV fund sources and stipends are generated using the configured fund source order, the amounts for the stipends will not exceed the amount available for each fund source. If there are not enough fund sources configured to resolve the balance in full, a Non-Title IV credit balance will remain for the student.

Generating Stipends with a Title IV Credit Balance Remaining

If a student has a Title IV credit balance and stipends are generated using the configured fund source order, the amounts for the stipends will not exceed the amount available for each fund source. If there are not enough fund sources configured to resolve the balance in full, a Title IV credit balance will remain for the student.

Fund Source Order Configuration

If the Fund Source Sort order configuration has been turned on and the fund source sort order defined, CampusNexus Student evaluates the credit balances and assigns fund sources to the stipend based on the fund source order specified. See Use Fund Source Order (Setup > Campus Locations > select a campus > Add/Edit (button) > Refunds & Stipends (tab) > Stipends (subtab)).

If the Fund Source Sort order configuration is not turned on, CampusNexus Student continues to generate stipends using the current logic when evaluating credit balances.

Note: This logic does not apply to the Title IV credit balance wizard.

When a fund source order has been configured, CampusNexus Student evaluates Title IV credit balances using only the Title IV fund source and assigns it to the stipend, even if an available Non-Title IV fund source is higher in the sort order position. For

example, a sort order is designated as: State Grant, and Sub. The State Grant is higher in the sort order, and there are no previous stipends or refunds. Since CampusNexus Student is evaluating for Title IV, the SUB fund source is assigned to the Title IV stipend.

When a fund source order has been configured, CampusNexus Student evaluates an overall credit balance (Non-Title IV + Title IV) using the fund source order designated to assign a fund source to a stipend. For example, the Fund Source Order is State Grant, and Sub. There is a Non-Title IV credit balance and a Title IV credit balance to be evaluated. Title IV is evaluated first and the Sub fund source is assigned. Non-Title IV is evaluated second. CampusNexus Student first attempts to assign State Grant. If there is excess credit balance left, CampusNexus Student follows the sort order and attempts to generate another stipend assigning the Sub fund source.

When a fund source order has been configured, CampusNexus Student will not assign a stipend amount that would exceed the available amount left for the fund source (Amount Disbursed - Existing Refunds and Stipends that are posted). For example, if the fund source is $500 and the credit balance is 1500, CampusNexus Student can only assign a stipend amount up to $500 for the particular fund source. The remaining 1000 credit balance are evaluated for the remaining fund sources in the sort order. If there are no remaining fund sources, a credit balance remains.

When a fund source order has been configured, CampusNexus Student can assign multiple fund sources to satisfy a student's credit balance.

Example

A credit balance is 1756. The Fund Source Order is Pell, Sub, and Unsub.

The available amounts for each fund source is:

- Pell = 432
- Sub = 1000
- Unsub = 3500

The stipends created would include the remaining amounts for Pell and Sub + an Unsub of 324.

When the credit balance evaluation type is set to Student Level, CampusNexus Student deactivates the Fund Source Order configuration. All other evaluation types will have the fund source sort order configuration available.

A Non- Title IV credit balance remains for an evaluation period when the credit balance exceeds the available fund source amount or when there is a remaining credit balance and not enough fund sources are configured to resolve the balance in full.

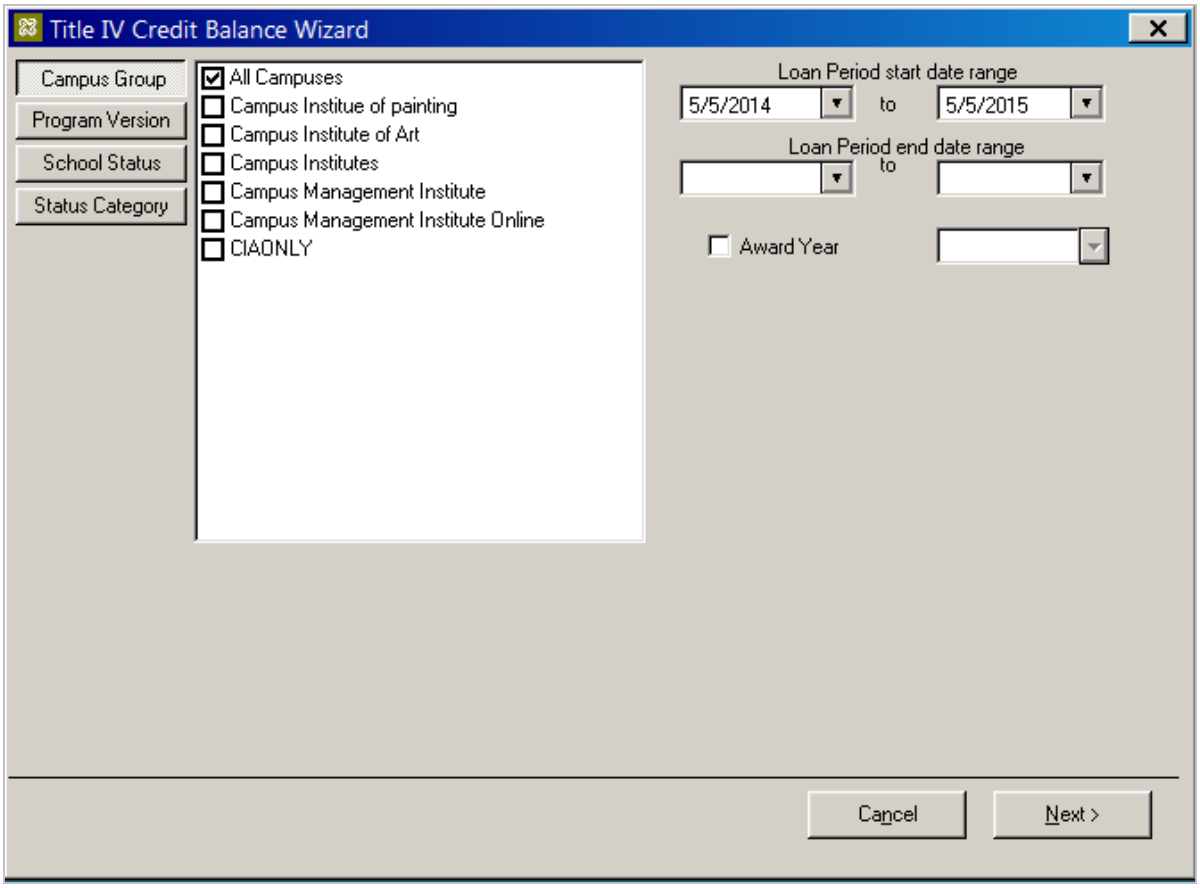
Title IV Credit Balance Wizard

The Title IV Credit Balance wizard allows authorized users to specify **Loan Period** date ranges, or an **Award Year** to schedule Stipends for Title IV credit balances. This wizard will assist campuses that do not have Auto-Stipends configured, but want to be in compliance.

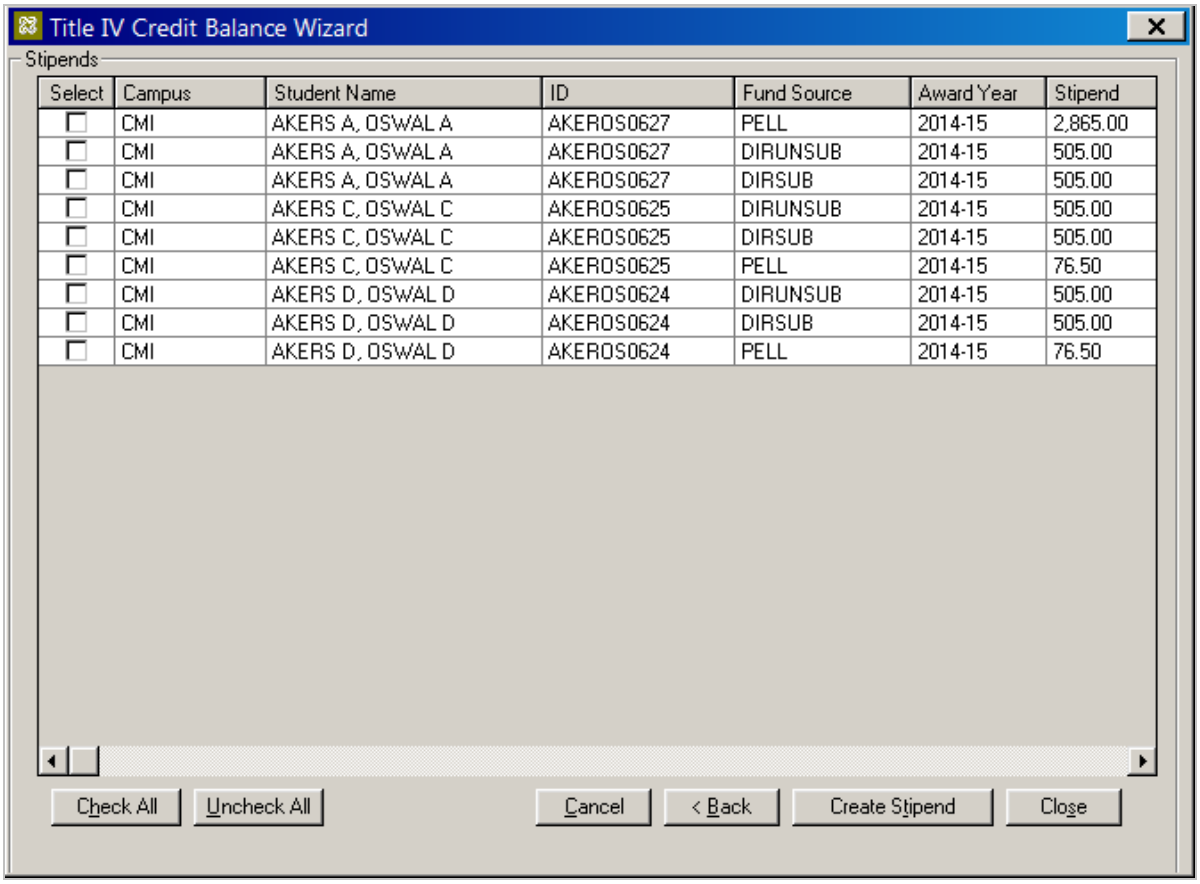
Note: When running the wizard, the stipend amount created on the award will correspond to the amount displayed on the Title IV Credit Balance Report. If the stipend amount on the Title IV Credit Balance report is greater than the amount available for the selected award, the stipend amount is distributed amongst the other awards within the reporting period. Also, for any students who are charged up front for multiple payment periods (e.g. for an entire program or academic year), Campus Nexus Student prorates the Title IV funds charges to determine the actual payment period (term / payment period) charges and calculate whether a Title IV Credit Balance has occurred. Details regarding the proration logic can be found in the Title IV Credit Balance Report topic under Proration Logic.

To open the Title IV Credit Balance wizard:

1. Navigate to **Daily** > **Student Accounts** > **Title IV Credit Balance**. The Title IV Credit Balance wizard is displayed.



2. Select one or more from the following: **Campus Group**, **Program Version**, **School Status**, and **Status Category**.
3. Select a **Loan Period** date range, an **Award Year**, or both, and click **Next**.
4. This step of the wizard displays those students who matched the criteria you selected in the first step and allows you to create stipends for students who have Title IV credit balances. The Stipend column displays the same results that would appear on the Title IV Credit Balance report.



5. Select one or all students and click **Create Stipend**.

   Note: This will schedule a stipend on the indicated fund source; it will not post the stipend for the student. You still have to process the stipends as normal.

6. A confirmation message is displayed. Click **Yes**.

7. A confirmation message is displayed. Click **OK**. The Title IV Credit Balance wizard closes.

Configure Payment Apply Order

Use the Configure Payment Apply Order form to define payment application hierarchies by campus or fund source. You can also copy a payment apply order from one campus to another campus or from one fund source to another fund source.

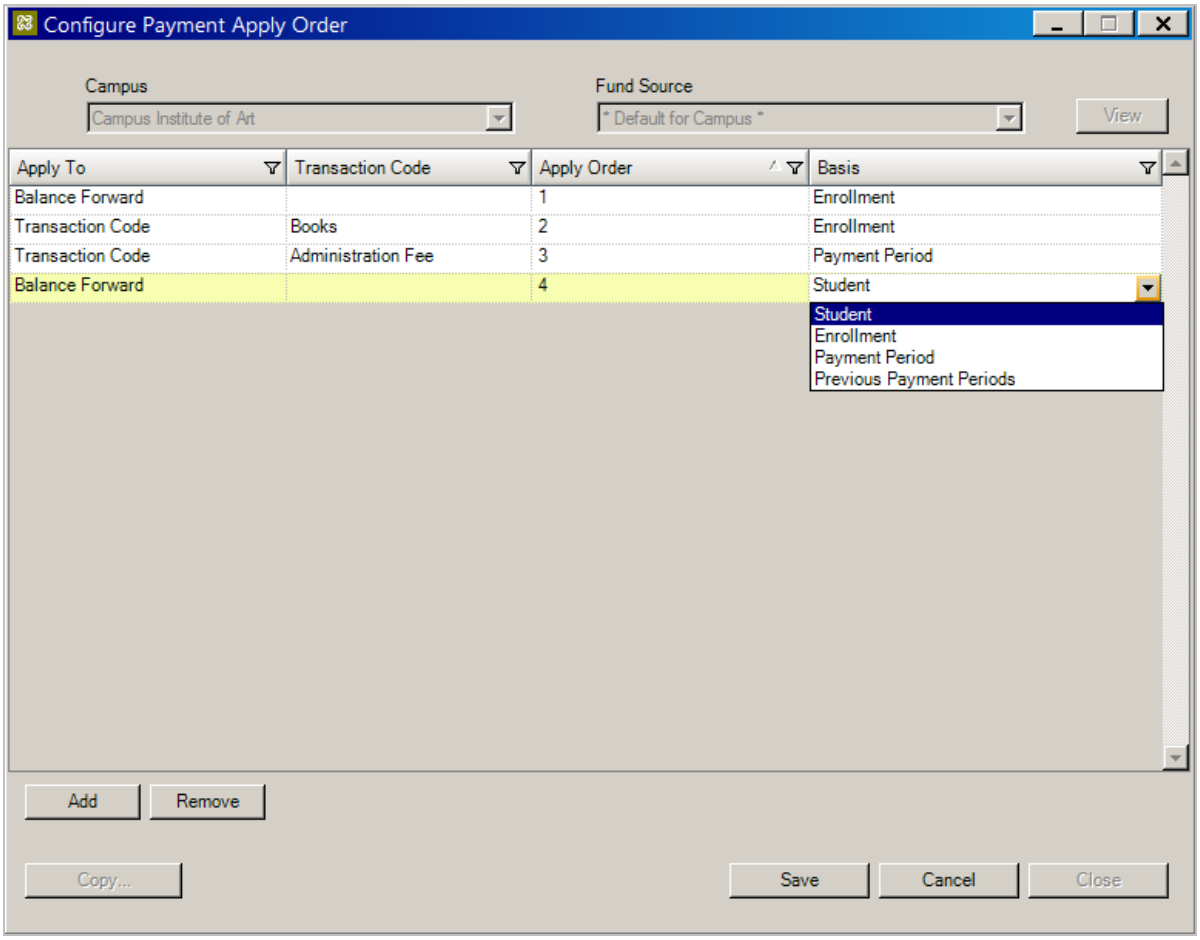
When a payment is a non-financial aid source, you can set up CampusNexus Student to use the default payment applications hierarchy for a campus. If there is no default payment apply hierarchy defined for the campus, the payment will be applied to all transaction code types starting with the oldest balances first.

When a payment is a fund source (such as a Scholarship), you can set up CampusNexus Student to use the application hierarchy for that fund source. Certain fund sources can be limited to paying only specific types of transaction codes while other fund sources can be applied to all charges on the ledger. For example, a Scholarship can be configured so that funds received from that source can only be applied to Tuition. If the fund source for the payment transaction is not defined in the hierarchy for the campus, the default payment apply hierarchy for the campus will be used.

See Setup > Campus Locations > Campuses > Accounting(tab) > Campus Accounting for information about configuring your campus to use the Auto Apply Using Hierarchy.

To configure a payment apply order:

1. Navigate to **Daily > Student Account > Configure Payment Apply Order**. The Configure Payment Apply Order form is displayed.
2. Select a **Campus** and click **View** or select a **Fund Source** and click **View**.
    - Sort the columns by clicking on the column headings.
    - Filter the data in the columns by clicking on the filter icon . A list of predefined filter fields and an option for custom filters is displayed.



3. Click **Add** to add a new row.
4. In the **Apply To** column, select one of the following options:
   - **Transaction Code** - Select this option to set up the payment apply hierarchy on the basis of transaction codes.
   - **Balance Forward** - Select this option to set up the payment apply hierarchy on the basis of the remaining balance forward.
5. In the **Transaction Code** column, select transaction codes (for example, Tuition, Books, etc.) to include in the auto-apply payment hierarchy.

   Note: You can select a transaction code only if you selected Transaction Code in the Apply To column.
6. In the **Apply Order** column, assign priority levels in the hierarchy to indicate how the payment should be applied to a transaction code or to the remaining balance forward.

   Example: To set up the hierarchy for Transaction Codes for Tuition first, Books second, and Administration Fees third, and the remainder to be on the basis of Balance Forward, you would set the Apply Order of Transaction Code for Tuition = 1, Books = 2, Administration Fee = 3, and Balance Forward = 4.
7. In the **Basis** column, for each Apply Order level, you can limit the basis of the payment application on the following:

   - **Student** - All debit transactions for the Student.
   - **Enrollment** - Debit transactions that were posted to the same Enrollment as the payment.

- **Payment Period** - Debit transactions that were posted in the same Payment Period as the payment.
- **Previous Payment Periods** - Debit transactions that were posted prior to the payment period of the payment.

8. Click **Save**.

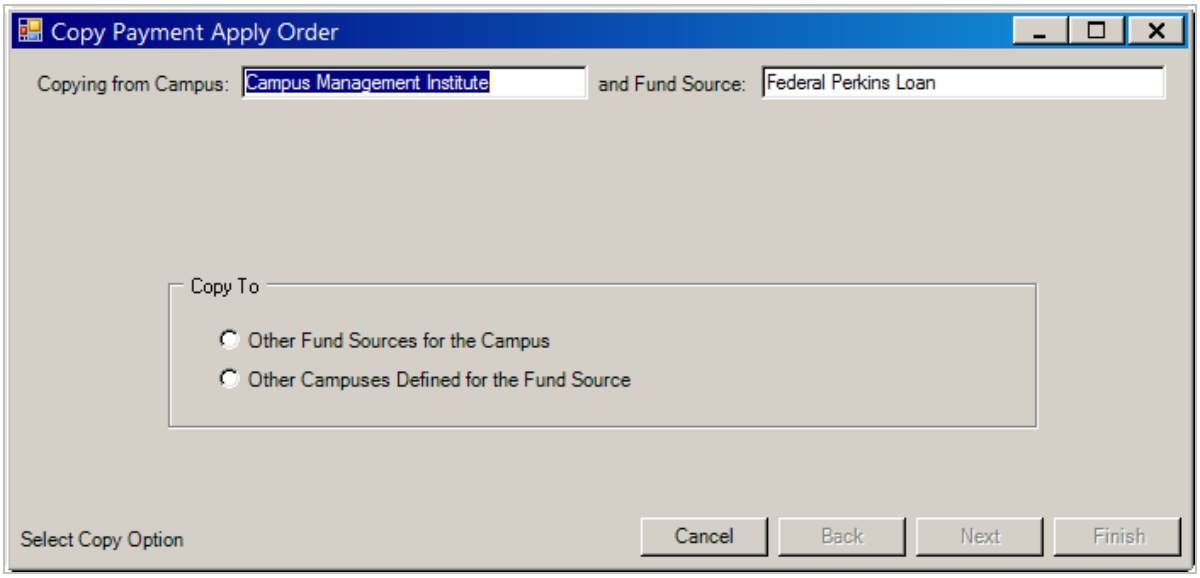
To copy a payment apply order:

1. Select a **Campus** or a **Fund Source** that you would like to copy in the Configure Payment Apply Order form.

   If you select a Campus , the payment apply hierarchy will be the default for that campus.

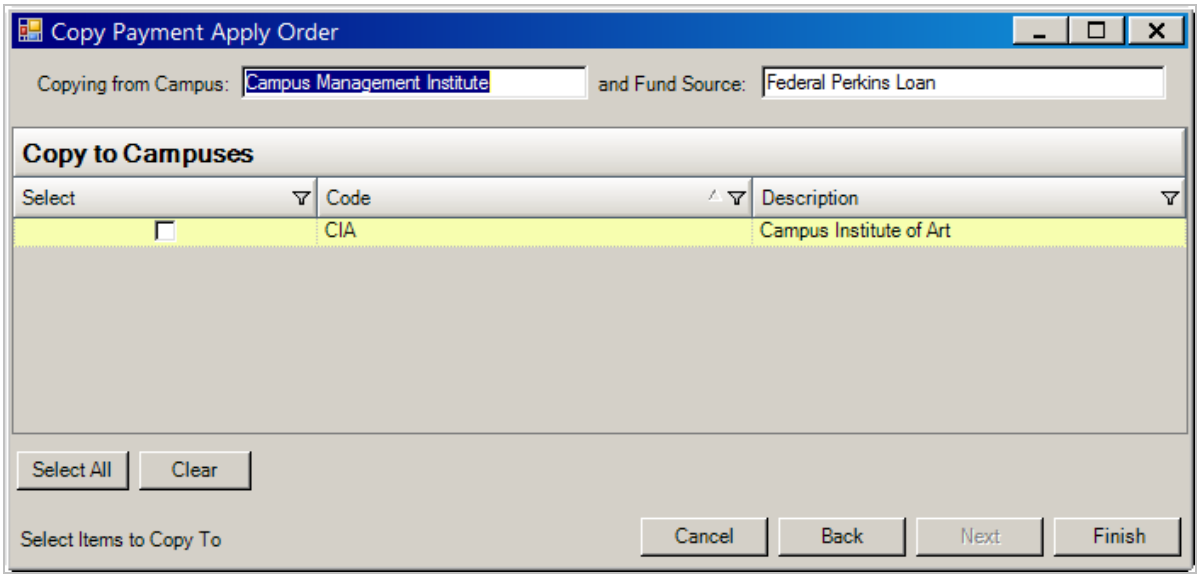
2. Click **Copy...** .

   The Copy Payment Apply Order form is displayed with the Campus or Fund Source you selected.



3. In the **Copy To** area, select one of the following options:

   - *Other Fund Sources for the Campus* - This feature allows you to select additional fund sources of the selected campus to which the selected hierarchy will be applied. Click **Select All** to copy the hierarchy to all the fund sources for the selected campus.
   - *Other Campuses Defined for the Fund Source* - This feature allows you to select additional campuses to which the selected hierarchy will be applied. Click **Select All** to copy the hierarchy to all the campuses.



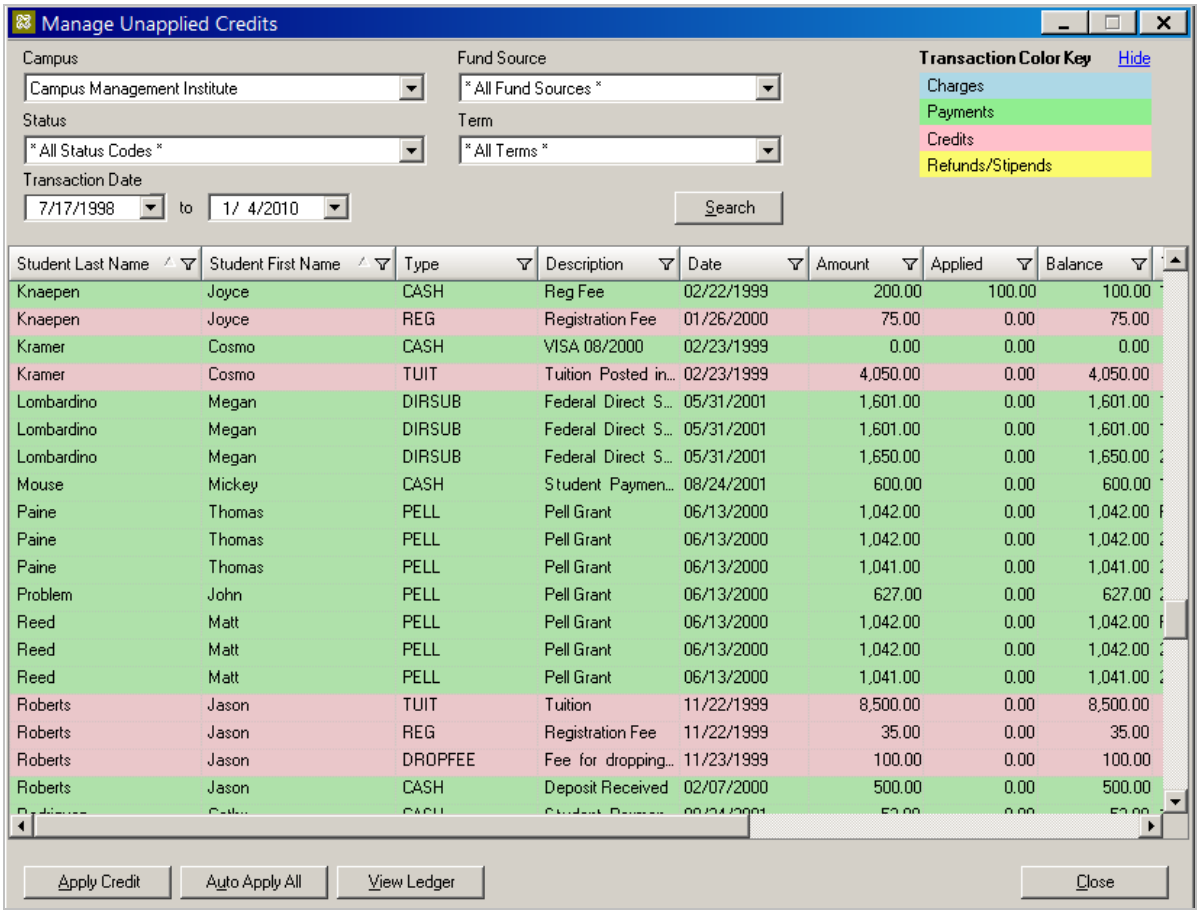
4. Click **Finish** when you have completed your selections.
5. A confirmation message is displayed. Click **OK**.

Manage Unapplied Credits

Use this form to locate credits that have a balance remaining to be applied and then select the debits with open balances to apply the credit to.

To manage unapplied credits:

1. Navigate to **Daily > Student Accounts > Manage Unapplied Credits**. The Manage Unapplied Credits form is displayed.

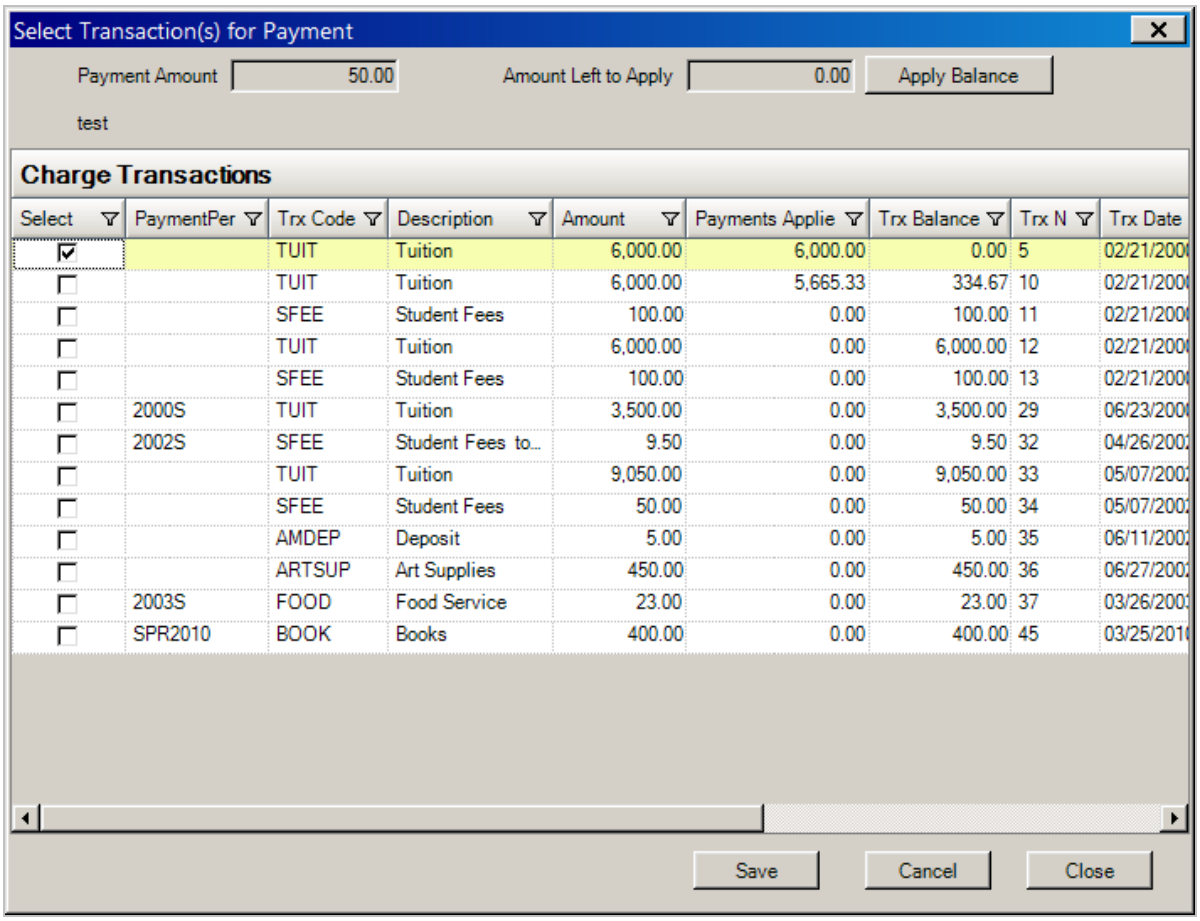


2. Select the unapplied credits you want to view by using from the following search criteria:
    - **Campus** - allows you to select which campus you would like to view
    - **Fund Source** - allows you to select unapplied credits from a particular fund source
    - **Status** - allows you to select only students with a particular enrollment status
    - **Term** - allows you to select unapplied credits that are associated with a particular term
    - **Transaction Date** - allows you to select only unapplied credits that fall within a particular transaction date range
3. Click **Search** to display the list of credits for the search criteria you entered. The form lists all transaction types.

Click **Show key** to view the Transaction Color Key. Note that credits are listed in pink.

Note: Sort the columns by clicking on the column headings. Filter the data in the columns by clicking on the filter icon . A list of pre-defined filter fields and an option for custom filters is displayed.

4. Click on the row of the credit you would like to apply.
5. Select one of the following actions:
   - Click **Auto Apply All** to auto-apply all unapplied credit transactions displayed based on the hierarchies configured in Configure Payment Apply Order.
   - Click **View Ledger** to view the Student Ledger Card for the student associated with the currently selected row in the grid. See Ledger Cards for more information.
   - Click **Apply Credit** to show the debits with open balances to apply the credit to. The Select Transaction(s) for Payment form is displayed.



   - The **Payment Amount** field shows the original payment.
   - The **Amount Left to Apply** field shows the remainder left from the **Payment Amount** that is available to be applied.
6. Select from the list displayed the debit(s) you would like to apply the credit to. If you select a debit that reduces the credit to $0 and try to select another debit to apply a credit to, the following message is displayed: *"The full amount*

of the transaction has been applied. No more items can be selected."

7. Click **Apply Balance**. The amount in the Amount Left to Apply field is reduced as you apply payments.
8. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

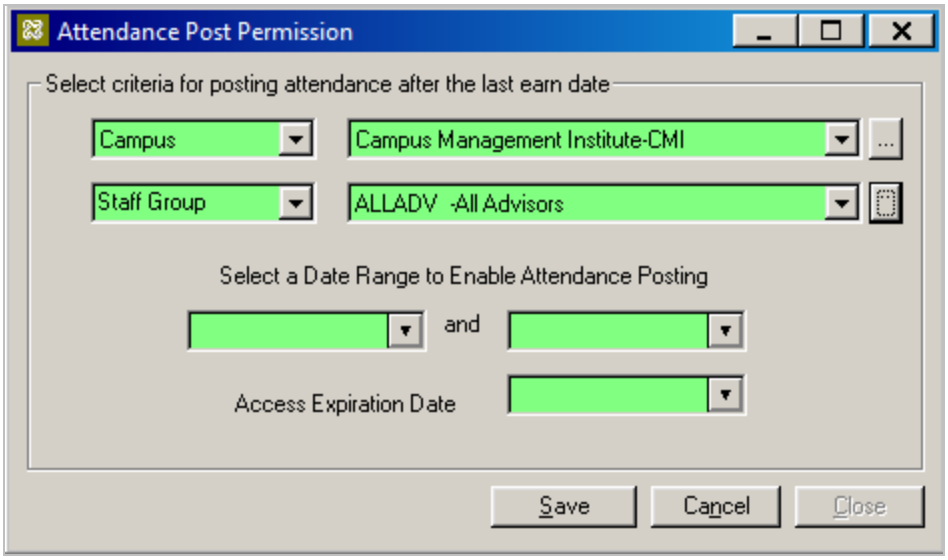
Manage Attendance Posting

A specified user/staff group can use the Manage Attendance Posting feature to define the parameters for posting/editing attendance for dates prior to or equal to the Last Earn Date.

Note: The Manage Attendance Posting menu item is disabled if the Preventing Attendance feature is turned off.

To manage attendance posting:

1. Navigate to **Daily > Student Accounts > Manage Attendance Posting**. The Attendance Post Permission form is displayed.



2. Select the **Campus** or **Campus Group**. The list displays only those campuses and campus groups to which the user has access **and** to which the Staff or Staff Group has access. For example, if the user has permission to access campuses A, B, C, and D, and the Staff Group has access to campuses B, D, E, and F, the list shows only campuses B and D.
3. Select the **Staff** or **Staff Group**. The list displays only Staff Members or Staff Groups that belong to the Campuses or Campus Groups selected.
4. Select a **Date Range to Enable Attendance Posting**. The begin and end dates must be prior to or equal to the Last Earn Date for all campuses included in the request.
5. Select the **Access Expiration Date**. The expiration date must to be greater than or equal to the system date.

Daily > Academic Records Options

The Daily > Academic Records menu offers the following options.

- Create Student Alumni Record
- Document Tracking
- Schedule Classes
- Define Term Registration Groups
- Setup Registration Tracks
- Registration
- Registration Bill
- Batch Unregister Courses
- Attendance >
    - Rosters
    - Record Attendance
    - Record Attendance Dates
- Grade Book
- Midterm Grades
- Generate Batch Transcripts
- Final Grades
- Honors and Comments
- Online Registration Configuration
- Scanning Services
- Instructor Maintenance
- Associate Instructors to Courses
- Status Change
- Batch Status Change
- Close/Reopen Term
- Population Analysis/IPEDS Enrollment Survey
- IPEDS-Completion Survey
- Satisfactory Academic Progress
- Review Automated SAP Results
- Process Queued Transfers
- Identify Failed Course Prerequisite Rules
- Export Data > State Reporting > Texas >
    - THECB-Configuration
    - THECB-Extract
    - ICUT-Extract
- Registration Extract Status
- DPA-Elective Pool (see Degree Progress Audit Form)
- Gainful Employment Import (see Regulatory Help)
- Gainful Employment Export (see Regulatory Help)
- Generate Batch Transcripts
- <Detach> (This options detaches the submenu.

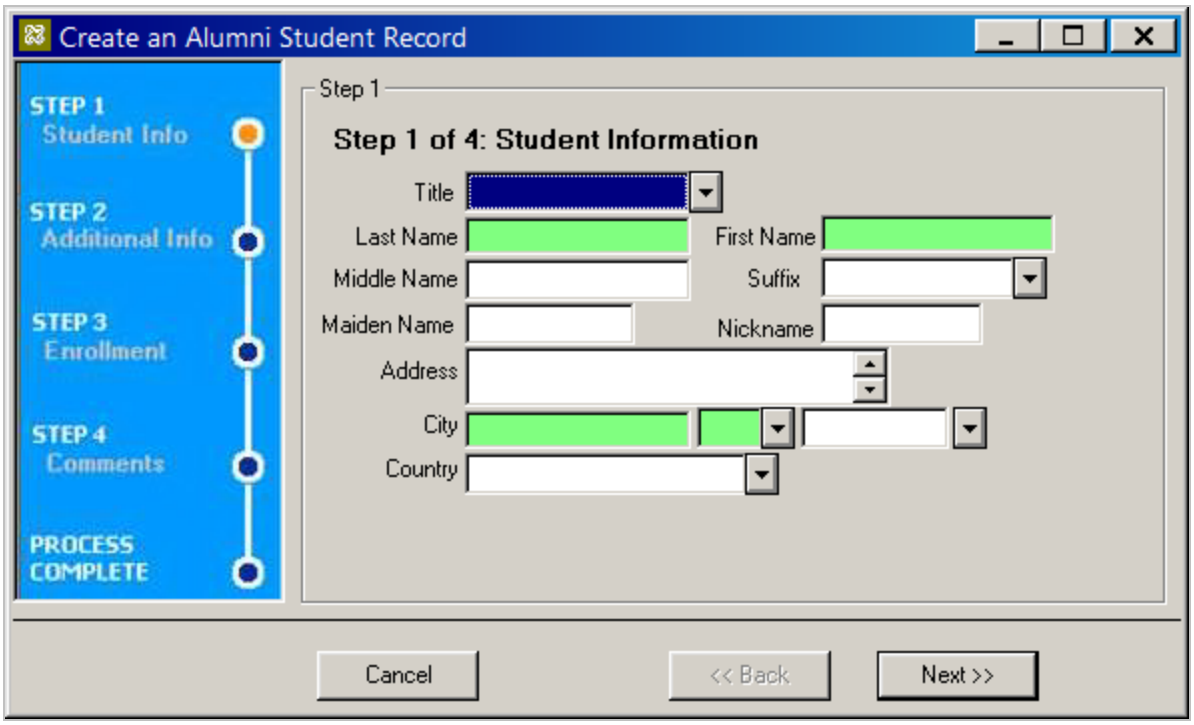
Create Student Alumni Record

CampusNexus Student enables authorized users to create master records in the CampusNexus Student database for students who graduated before the school migrated to CampusNexus Student. A record for the student may not exist in the database depending on how long ago the student graduated and how much historical data was included in the initial data conversion.

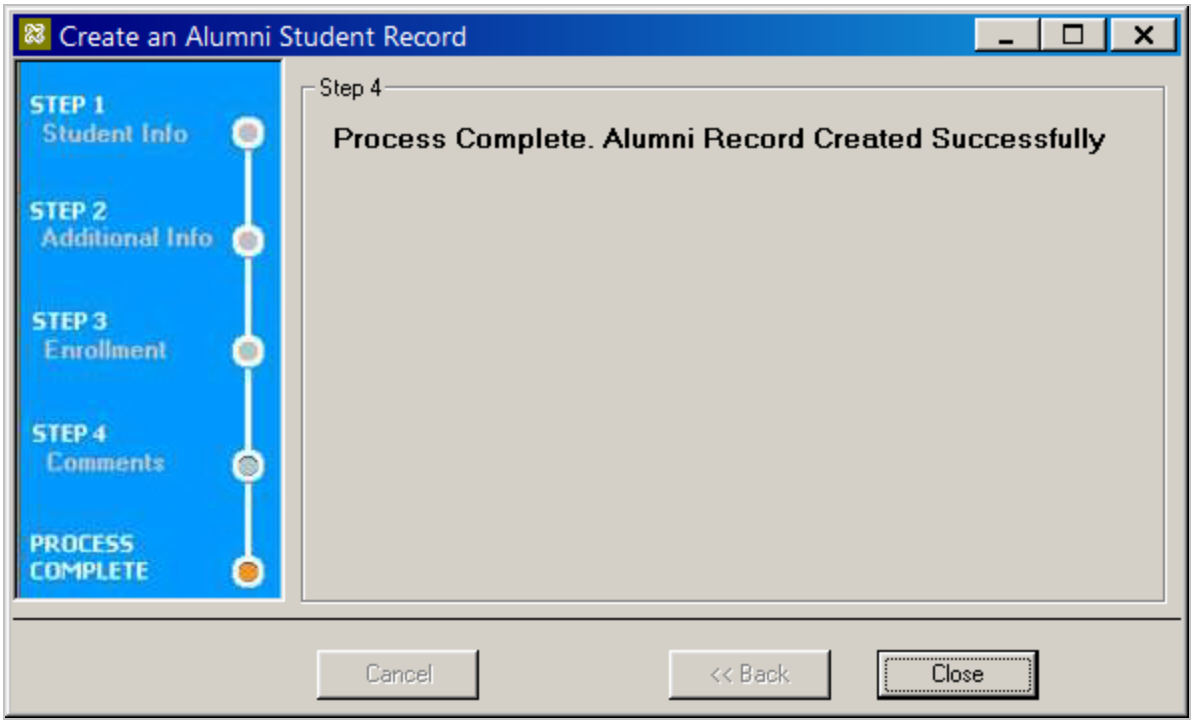
The new alumni record serves as a skeleton record for the student. It contains enough information to allow for the student record to be worked with further in the Career Services module.

To create an alumni student record:

1. Navigate to **Daily > Academic Records > Create Student Alumni Record**. The Create an Alumni Student Record form is displayed.



2. Complete applicable fields on Steps 1, 2, and 3 of form and click Next.
3. Step 4 displays a confirmation message. A Student Master record is created and the student can be found using the Student Search tool.



4. Click **Close** to close the form.

Document Tracking

Institutions request documents from students and persons or organizations connected with the student. Use Document Tracking to keep track of the documents that are necessary for processing student records in an orderly fashion.

Document Tracking is available in the following modules:

- Admissions - AM
- Financial Aid - FA
- Student Accounts - SA
- Academic Records - AD
- Loan Management - LM
- Career Services - PL

You can use the Daily > Document Tracking feature to look at all documents of a certain type to determine the document's status for each student.

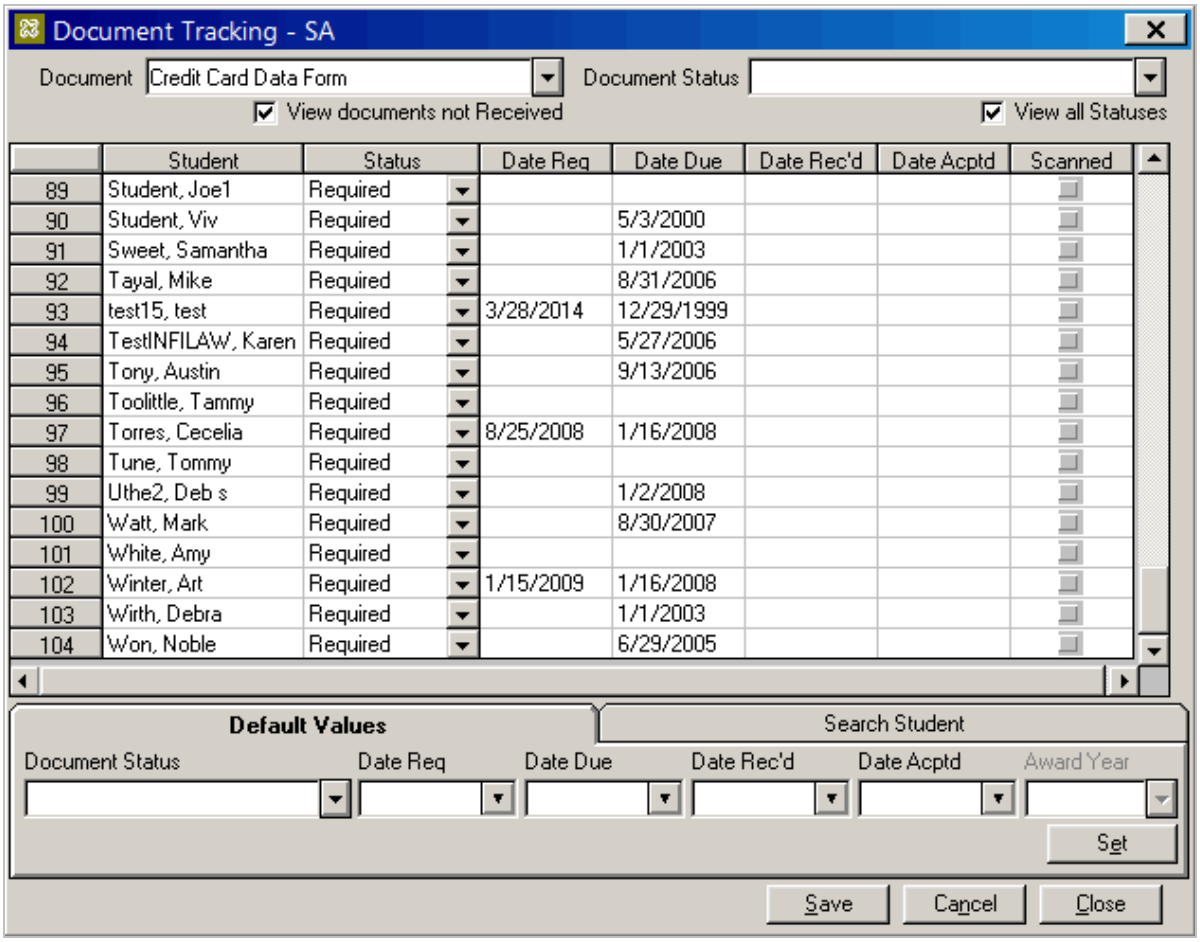
Several documents relate to academic or demographic history and your organization must have copies of them for each student. Examples are birth certificates, driver's licenses, transcripts, alien registration cards, social security cards, etc. Management policy determines which documents are important at your institution.

You can set up lists of these documents and assign them to each student record. You can then record the current status of the documents, the date you requested each document, and the date you received each document. You can also indicate that the document has been scanned into your electronic filing system.

Note: This approach differs from the Document Tracking option that you can access from the View > Contact Manager menu or Student Bar. When you access Document Tracking from the Student Bar, all documents related to a specific student as displayed. Here, you see all students related to a given document.

To edit tracking data for listed documents:

1. Navigate to **Daily > Admissions** (or other module) **> Document Tracking**. The Document Tracking form is displayed.



2. Select a **Document** from the list box at the top of the form. All students having the selected document related to their files are listed on the form.
3. Select or clear **View Documents Not Received**.
   - If the check box is selected, only those documents that have not been received are listed.
   - If the check box is cleared (default), all documents (subject to your Document Status selection) are listed.
4. For Document Tracking in Financial Aid - FA, select an **Award Year** to which the documents apply.

   Note: If you choose a Financial Aid document that does not have the "Award Year Specific" flag selected (indicating Yes) on the Document Setup, the form is displayed with the three Award Year fields disabled.
5. Select or clear **View All Statuses**.
6. Select an optional **Document Status**. If you select a document status, CampusNexus Student lists only the type of document you selected and only those that have the selected status.
7. From the displayed list, find a student document.
8. Click on a field in the row you want to update. You can update the following fields:
   - Status
   - Date Requested
   - Date Received
   - Date Due

- Date Accepted
- Scanned

Note: In date fields, you must enter the century along with the year. For example, 06/30/2000. If you just enter 99 instead of 1999, CampusNexus Student will reject it.

9. Click **Scanned**, if necessary, to indicate that you have scanned the requested document into your electronic filing system.
10. The **Default Values tab** enables you to update statuses and dates in batches.

    If you select a Status, or a Date Due, or Award year, for example, CampusNexus Student updates the values of all students whose names appear in the grid. Click **Set** to update the values and save your work.
11. The **Search Student tab** enables you to search a student using the Social Security Number (SSN) or Student ID.

    Type the SSN or ID and click **Filter**. CampusNexus Student finds the student associated with that number and displays only that student's name and information in the grid. Click **Clear Filter** to remove the filter. The grid revert to the previous display of students.
12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Schedule Classes

Before students can be scheduled in classes, you must develop a plan for the class room usage and schedule the classes for the various shifts. You would want to coordinate classes so that the classes for a given program are not offered at the same time on the same days of the week. Students must be able to use their time on the campus efficiently, scheduling a productive array of classes during the day, while allowing time to get from one class to the next.

Many variables go into making an efficient use of the class room space, the instructor time, and the student time. We cannot go into all the variables at your institution that influence how you arrive at the class schedule for a given term. We can only tell you how to add a new class to the list of classes available for a given term.

The Class Section Registration cube report (under Reports > Academic Records > Class Section Registration) can help you plan class schedules. The variables that go into the mix when planning the distribution of classes are available in this report. These variables include campuses, terms, class section codes, buildings, rooms, instructors, days of the week, periods, students, and others. You can combine and list these variables to view meeting patterns for your class schedules.

CampusNexus Student provides some conflict resolution features:

- A warning is displayed if you try to schedule a class in a room for which another class has already been scheduled at the same time. (If a room is used for more than one class at the same time, create two room IDs such as 304A and 304B.)
- A warning is displayed if you try to schedule an instructor for a class when the instructor is already scheduled for the same time period in another class.
- CampusNexus Student does not allow you to enter duplicate class codes for a course in the same term.

Variable Class Schedules

You can identify a class that meets at variable days and times. When posting attendance for such a class, specify the date for which you are posting attendance. This requires an expected day and time to be scheduled to maintain the printing of the student schedule. If you do not want it on the schedule, you do not have to specify days and times. Use the comment box (one line) next to the course on the student's schedule to enter comments, such as "By Arrangement" when a course with no days/times is specified. The Student Schedule report shows the comments.

Automatic Attendance Warnings and Drops

If the class setup indicates that a student is to be dropped from the class after too many absences, the Attendance Posting routine updates the student's class status by setting it to "D - Dropped" when absences exceed the set limit. This only works when adding NEW attendance. You can also set up a class to trigger a warning flag when absences exceed the set limit. The warning flag causes a message to appear on class rosters (**WARNING - excessive absences**).

Integration with CampusNexus Finance, HR & Payroll

When CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll and Faculty Management Integration is enabled for the campus, for any faculty member who has been assigned as a primary or secondary instructor CampusNexus Student sends the following information to CampusNexus Finance, HR & Payroll:

- Term
- Instructor ID
- Course Code
- Class Section

CampusNexus Finance, HR & Payroll sends updates to CampusNexus Student each time the following information about a Class Schedule is modified or deleted:

- Class Section or Description
- Course
- Term

- Instructor
- Instructor Designation
- Start Date or End Date
- Enroll Status Credit and Hours
- Associated Campuses
- Active flag
- Period

If an instructor is changed on a Class Schedule, the current Instructor is unassociated from the Class Schedule and the new instructor is assigned to the Class Schedule.

For all Class Schedules, CampusNexus Student sends CampusNexus Finance, HR & Payroll the value of the 'Maximum Students' field, including any updates to this field. CampusNexus Finance, HR & Payroll in turn displays the 'Maximum Students' configured for a Class Schedule.

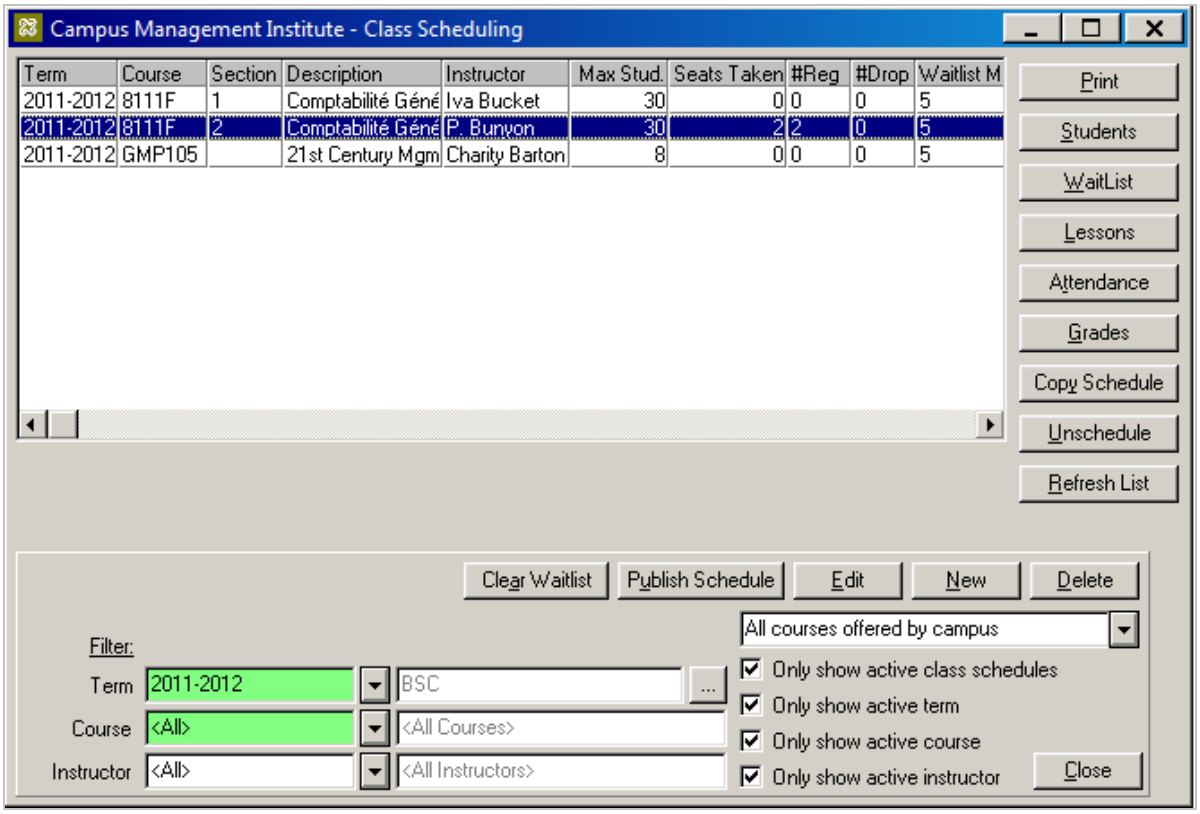
CampusNexus Finance, HR & Payroll notifies the user if this information was not successfully sent.

To add or edit a class schedule:

1. Navigate to **Daily** > **Academic Records** > **Schedule Classes**. The Class Scheduling form is displayed.
2. To speed program operation and to avoid the confusion of listing every course that your campus offers, the form first appears without any courses listed. Use the **Filter** options in the bottom of the form.
   - Term (Click to the right of the Term fields to view the Term Selection form.)
   - Course
   - Instructor

   Additional filter options include:
   - All courses offered by campus (default)
   - Only courses shared to other campuses
   - Only courses shared from other campuses

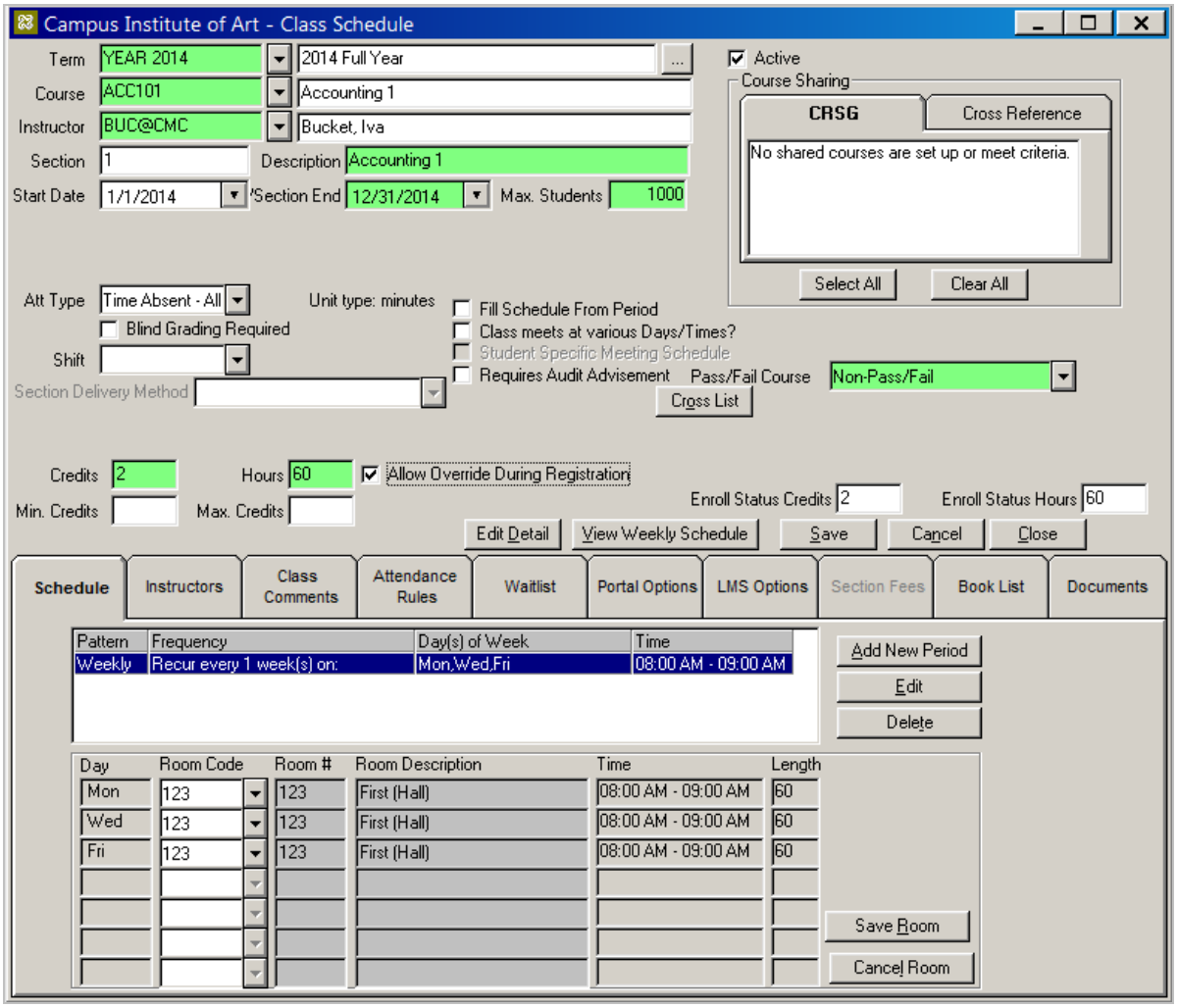
   The following filter options are selected by default:
   - Only show active class schedules
   - Only show active term
   - Only show active course
   - Only show active instructor



3. To add a class, click **New**. A blank Class Schedule form is displayed.

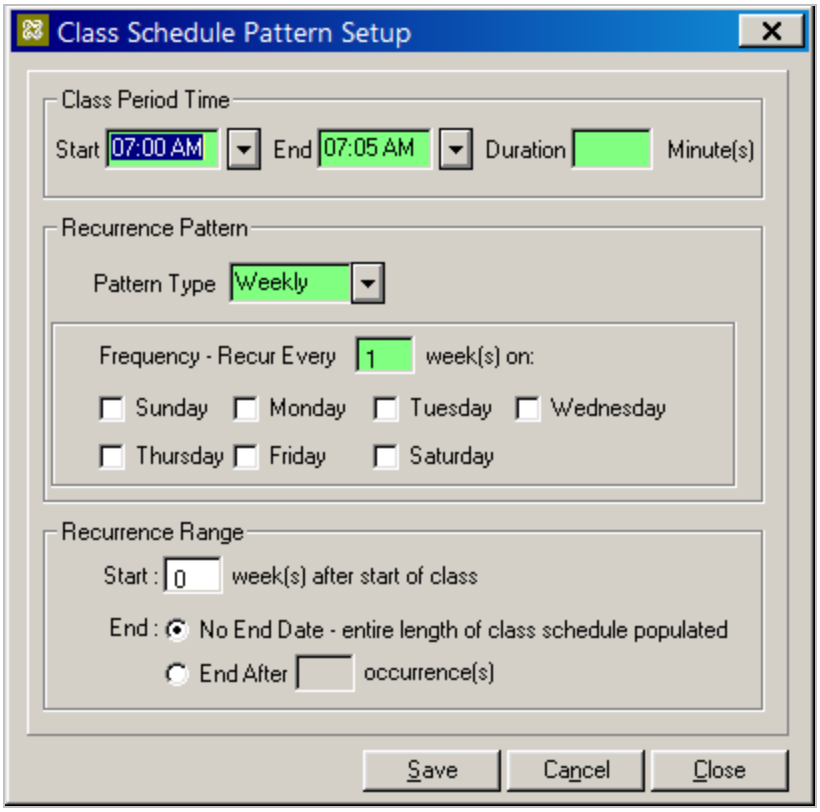
   Note: Business rules for the **New** button prevents a course from being scheduled for a term if it is a Dependent course and the defined Parent course has not been scheduled for the selected term. A message is displayed: "*There are no parent courses currently scheduled for the term for this course. This course cannot be added to the term class schedule until at least 1 parent course has been scheduled.*" Click **OK**.

   To edit a class, select a class and click **Edit**. A Class Schedule form containing the current data about the class is displayed.



4. Select or enter data according to Field Descriptions - Class Schedule Form.
5. Click **Edit Detail** to see the class schedule in a calendar format. For more information, see Class Scheduling and Attendance.
6. Click **Print** to run the Term Class Schedule report. The report is also available via Reports > Academic Records > Class Schedule.Students
7. Click **Students** to view a list of students scheduled in the selected class. You can select more than one class at a time.
8. Click **Waitlist** to view a Class Roster to see waitlist details for the selected class.
9. Click **Lessons** to view or set up lessons for the selected class.
10. Click to **Attendance** view or enter attendance for the selected class.
11. Click **Grades** to view or enter grades for students in the selected class.
12. Click **Copy Schedule** to copy one class to another (new) class, or copy an entire term to another term.
13. Click **Unschedule** to unschedule a selected class.
14. Click **Refresh List** to refresh the form with current data.

15. Click **Clear Waitlist** to reset all wait lists to zero.
16. Click **Publish Schedule** to view a form that allows you to configure when to publish the class schedule online.
17. Click **View Weekly Schedule** to view the weekly schedule.
18. Click **Add New Period** to add details for the class schedule by entering the values in the Class Schedule Pattern Setup form. This form is identical to the Period Code Setup form except that the fields Code and Description are not used here.



Note: When the Add New Period button has been selected, the 'Class meets at various Days/Times?' and 'Student Specific Meeting Schedule' options are disabled.

19. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

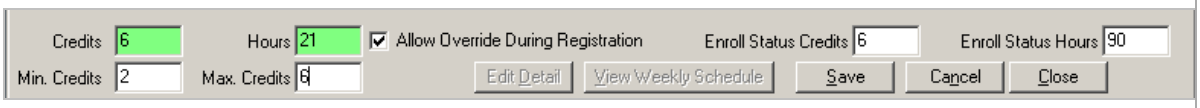
Field Descriptions - Class Schedule Form

Field	Description
Term	Select the term in which the class is offered. If your institution is set up for floating terms, click **Browse** to select more than one term. This button is displayed only if your school uses floating terms. See Floating Term Class Scheduling for an overall view of this feature.
Course	Select the course that is being taught in the class.

Field	Description
Instructor	This field contains instructors for the course that were configured for the course. Select the instructor who will teach the course. You can assign additional instructors, or secondary instructors, for courses that are co-taught or have assistant instructors for lab sessions. Use the Secondary Instructors field. All courses with multiple instructors must designate a primary instructor. Courses may or may not have secondary instructors. **Note**: The primary instructor is used in all business logic selection criteria and sorting for instructors (for reports, posting attendance, printing rosters, etc.).
Course sharing	To allow students at other campuses to take this course, indicate which campuses are allowed to share this course and which campuses are allowed to cross-reference this course. If students at all campuses are allowed to take this course, click **Select All.**
Show All	The Show All check box appears if the override instructor course association option is enabled. If selected, all instructors are displayed.
Section	Enter the section number (alphabetic and numeric characters are permitted).
Description	The description of the course is displayed. You can change it if required.
Start Date	The date on which the class starts. The default is the term start date. You can change it if required. **Note**: The revenue earning period is equal to the Start Date.
End Date	The date on which the class ends. The default is the last day of the term. You can change it if required. **Note**: The revenue earning period is the End Date of the revenue earning period of the course.
Max. Students	Enter the maximum number of students allowed in the class. When students are registered for the class, this is considered the maximum limit. There is no override at the time of registration. The only way to override is to change this number.
Add/Drop Date	This field is only visible and required when the 'Add/Drop Flag' field is configured to "S" (Course Section Enforced) for the course section's campus. If the course section is shared with other campuses on the CRSG tab, the course section's campus is used to get the add/drop flag. The add/drop flag configuration of any of the shared campuses is not used. You can configure this date when the 'Manual Override' check box is selected. If the 'Manual Override' check box is cleared, the value in this field was calculated by CampusNexus Student. This date is automatically calculated and refreshed when you clear the 'Manual Override' check box. If changes are made to any of the following fields on this form, the 'Add/Drop Date' value is recalculated: • Course • Start Date / End Date • Shift • Fill Schedule from Period (check box) • Manual manipulation of the class schedule, using the 'Schedule' tab (i.e., Add New Period, Edit, and Delete) • Manual manipulation of the class schedule using the Class Schedule Calendar (i.e., adding or canceling class meetings) via the 'Edit Detail' button.

Field	Description
Manual Override (Add/Drop Date)	This check box is only visible when the 'Add/Drop Flag' field is configured to "S" (Course Section Enforced) for the course section's campus. When the value of this check box is selected, the course section 'Add/Drop Date' field is enabled to allow you to enter a date manually at any time, even after it has been automatically calculated; if cleared, the course section 'Add/Drop Date' field is disabled. **Note**: The default value of this check box when the form is first opened is as follows: • When adding a new course section, the default is cleared. • When editing an existing course section, the default of this check box is based on the existing value.
Last Day to Withdraw Date	This date is calculated on the basis of configurations for Enforce Last Day to Withdraw at the campus level (Setup > Campus Locations > Edit/Add > Academic Records (tab)). By default, this option is disabled. **Important Note**: Changes in Term, Start Date, and End Date force recalculation of Last Day to Withdraw Date.
Manual Override (Last Day to Withdraw Date)	This check box allows you to manually edit the Last Day to Withdraw Date. When the box is cleared, Last Day to Withdraw Date is not editable. By default, this option is disabled.
Att Type	The Attendance Type determines how attendance is maintained for the course. The options are: • Time Absent-All (default) • Time Present Only (Enter the number of units completed in the attendance posting procedure.) • Time Present-All (Enter the number of units completed and the system calculates the time absent.) • None (You can post the Last Date of Attendance (LDA) for students in the class under Daily > Academic Records > Attendance > Record Attendance Dates. However, you will not be recording, through the attendance procedures, the number of units completed.) **Note:** If the course is set up to measure the units completed instead of time (in other words, if the Unit Type is set to Quantity instead of Minutes on the Course Setup form), select Time Present Only or None here.
Unit Type	This is the type of unit used to record attendance. The options are Minutes or Quantity. Unit Type is determined in the Course Code setup.
Fill Schedule from Period	When 'Fill Schedule from period:' is selected, the class will meet at a predefined meeting time. This option allows you to predefine a session pattern for a class schedule that may be saved and used when setting up other course sections. If a period does not exist that meets the course needs, you can create a period under Lists > Academic Records > Period. If this option is selected, the options for 'Class meets at various Days/Times?' and 'Student Specific Meeting Schedule' are disabled.

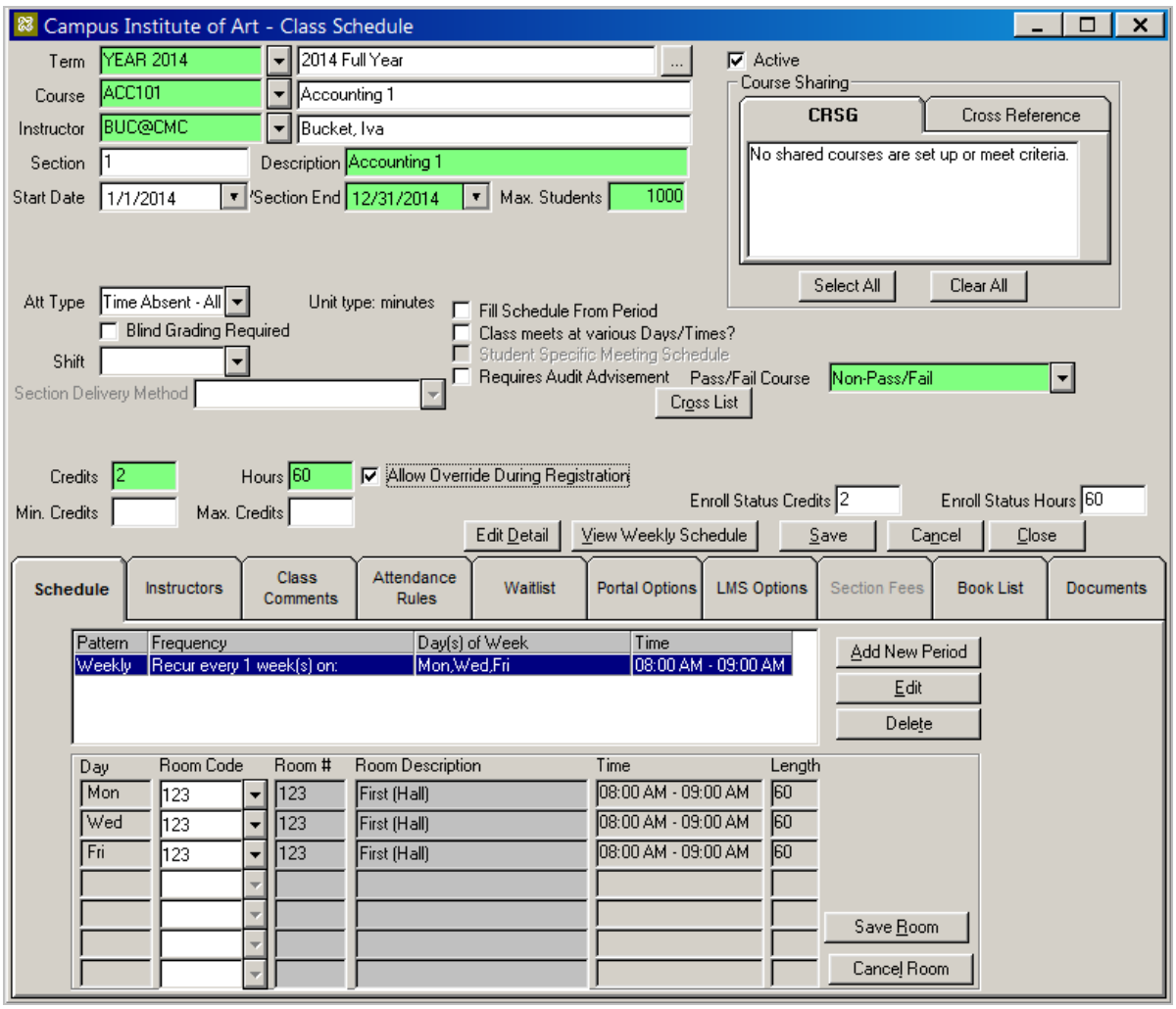
Field	Description
Blind Grading Required	Enable this option if this class uses blind grade Ids to conceal student names for this class. A blind grade Id is a random number (of six or more digits) generated by CampusNexus Student when a student registers into the first course that requires blind grading within a term. This blind grade Id is used in place of the student's name and is displayed on the reports generated by the system.
Class Meets at Various Days/Times	Select this check box if the class does not have regular scheduled meeting dates and times. This option allows for a course section to have a class schedule dynamically created when there are no set dates or times, as with a predefined schedule. This option is generally used for courses that do not have a predefined meeting schedule and the instructor creates it with the class as it progresses. This has been used for independent studies. With this option selected, the options 'Fill Schedule from period:' and 'View Weekly Schedule' are disabled. The buttons for 'Edit Detail' and 'Add New Period' are also disabled. **Best Practices Note:** Users need to be aware that the selection of the **Class Meets at Various Days/Times** check box takes precedence over any configured schedule in the system. Using this check box along with a configured schedule should be avoided as it can cause unpredictable results in attendance.
Student Specific Meeting Schedules	When the 'Class Meets at Various Days/Times' check box is enabled, the 'Student Specific Meeting Schedules' check box is enabled and the Attendance Rules tab is displayed to allow you to enter the Default Time per Meeting numeric value between 1 and 999. This value is used when a 'P' is entered for the student's attendance for student specific meeting schedules. **Note**: The actual class schedule is used to determine the Course Section. See also Record Attendance.
Shift	Select the shift to be associated with the class schedule from the drop-down list. **Note**: Shifts that appear in the Shift list box are defined by users using (Lists>Academic Records>Shifts) form.
Requires Audit Advisement	Check this box if the student requires audit advisement.
Section Delivery Method	Identify the delivery method used for the selected class by selecting the method from the drop-down list. **Note**: This option is grayed out if the campus does not have delivery methods defined in **Lists > Academic Records > Delivery Methods**.
Pass/Fail Course	See Courses Code Setup (Default Pass/Fail Settings section) for definitions of the system-defined list options for this field. Select the applicable option.

Field	Description
Secondary Instructors	The instructors' names appear in the Teacher field. If the names of secondary instructors exceed the span of the field, you can use the cursor to scroll through the list. To assign secondary instructors: 1. Click ... to the right of the **Secondary Instructors** field to view a list of possible secondary instructors. 2. Select all instructors that pertain to this class. 3. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.
Variable Credit Courses	The Credits, Hours, Min Credits and Max Credits fields and the Allow Override During Registration check box appear only if the Allow Override check box on the Courses Code Setup is selected. These fields are used when a Course is offered with a variable number of credits. Institutions offer variable credit courses in two ways. They may create multiple class sections with each individual class section having its own credit value or they may have class sections in which each students is allowed to select the credit value that suits their needs while registering. 
Credits	This field only appears when the Allow Override field on the Courses Code Setup form is selected. This allows the course to be scheduled with a variable number of credits. The Class Schedule form initially displays the Credits field with the value from the Course Code Setup form. This value can then be edited for the class section being created. You may want to do this if you have a variable credit course and want to offer different class sections with each one having its own credit value.
Hours	This field only appears when the Allow Override field on the Courses Code Setup form is selected. The Class Schedule form initially displays the Hours field with the value from the Course Code Setup form. This value can then be edited for the class section being edited. You may want to do this if you have a variable credit course and want to offer different class sections with each one having its own hours value. **Note**: If your campus is configured to compare Course Contact Hours with Class Schedule Hours, the hours specified on the class section are used in the comparison (instead of the course contact hours for variable credit courses
Allow Override During Registration	This check box only appears when the Allow Override field on the Courses Code Setup form is selected. When selected, students registering for the class section are allowed to select the number of credits they wish to attempt for the specified course section. If the check box is not selected, the Min Credits and Max Credits fields are disabled because students are not allowed to select the number of credits they will attempt when registering into this class section.

Field	Description
Min Credits	This field is only enabled if the 'Allow Override During Registration' check box is selected. A minimum credit value can then be entered. This value restricts students from selecting a lower credit value when registering into the class section. If this field is left blank, the minimum credit value defined on the Courses Code Setup form is used. If the value defined on the Course Code Setup form is blank, the student may elect any credit value.
Max Credits	This field is only enabled if the 'Allow Override During Registration' check box is selected. A maximum credit value can then be entered. This value restricts students from selecting a higher credit value when registering into the class section. If this field is left blank, the maximum credit value defined on the Courses Code Setup form is used. If the value defined on the Course Code Setup form is blank, the student may elect any credit value.
Enroll Status Credits	By default, this field is populated with the number of enroll status credits saved on the course setup. If students who register into this class section need a different enroll status credit weight to ensure accurate enrollment status calculations (for example at institutions who have modified enrollment status minimums for the summer term), enter the number of credits that can be used for this course towards the calculation of a student's enrollment status here. These courses can include, for example, graduate level internships that are a required part of the academic program, but which do not provide credits towards graduation and do not contribute towards academic progress calculation. The number entered in this field is used in enrollment status calculations and automated disbursement approval for the students registered into this section. Values entered in this field override any values that were received from the Course definition (Lists > Academic Records > Courses).
Enroll Status Hours	By default, this field is populated with the number of enroll status hours saved on the course setup. If students who register into this class section need a different enroll status hour weight to ensure accurate enrollment status calculations (for example at institutions who have modified enrollment status minimums for the summer term), enter the number of hours that can be used for this course towards the calculation of a student's enrollment status here. The number entered in this field is used in enrollment status calculations and automated disbursement approval for the students registered into this section. Values entered in this field override any values that were received from the Course definition (Lists > Academic Records > Courses).
Cross List	A message beside the Cross List button identifies the course as cross-listed. If the course is cross-listed, click the button to view information about the cross-listed courses on the Cross Listed Courses form.

Class Schedule - Schedule Tab

The Schedule tab on the Class Scheduling form provides an area to designate scheduling details for the class. You can select the class schedule attributes from the fields located in the top portion of the Class Schedule form, such as the Fill Schedule from period, Class meets at various Days/Times?, Last Day to Withdraw Date, Manual Override, and Student Specific Meeting Schedules options. The grid displays multiple class schedules that you have selected when using the Fill Schedule From Period option.



After you select a class schedule from the grid, the corresponding schedule is displayed as follows:

Field Descriptions

Field	Description
Pattern	This is the pattern of when the class meets. For example, daily, weekly, monthly.
Frequency	This field represents how often the class meets. For example, recur every 1(week) on:, recur at various times.
Day of Week	The day of the week is displayed automatically. This is a read-only field. You cannot modify or edit the day of the week.

Field	Description
Room Code	Select the room number for the class meeting from the drop-down list.
Room #	When you select the Room Code, the meeting room number is displayed automatically. The room is unique to the class. You can edit this field.
Room Description	The description for this room is displayed. If required, you can edit the description.
Time	The time of the class meeting is displayed. You cannot edit or modify the time of the meeting.
Length	The duration of the class meeting is also displayed automatically. This is a read-only field.

Edit/View button: Select a period from the grid and click this button to edit or view the details of a period associated with the class schedule. The button toggles between Edit and View depending on the period type. If the period is created through the List > Academic Records > Period form, the View button is displayed on the form to allow you to view the details of the period. You cannot edit the details using the View button. However, if you create a new period through the Add New Period, the Edit button is displayed allowing you to edit the details of the period.

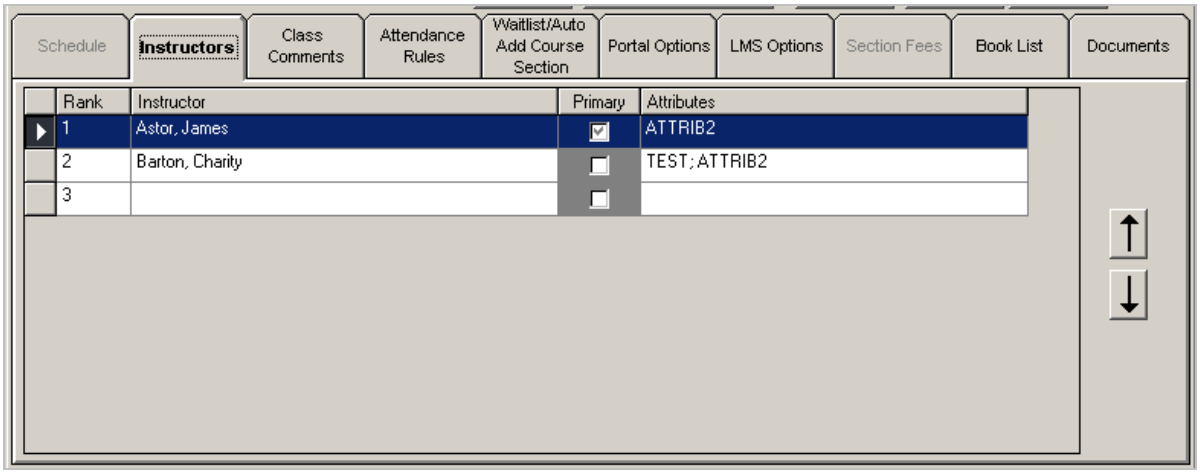
Delete button: Select a period from the grid and click this button to delete the association of the period with the class schedule. If you added the period using the **Add New Period** button, the period is also deleted from CampusNexus Student.

Save/Cancel Room buttons: Click this button to save or cancel the room associated with days in the bottom grid of the Schedule tab in the class schedule form.

Class Schedule - Instructors Tab

Use the Instructors tab to select or deselect attributes for instructors while creating a course section. These attributes serve different purposes depending on your institution's needs. For example, attributes may be used to generate custom reports to show how an instructor is paid or to track instructor utilization. Institutions can also assign attributes to instructors for courses that need to be designated for external reporting purposes and then run reports to provide to the external agencies.

All Active attributes created in Lists > Academic Records >Instructor Attributes are available for selection in the Instructors tab. Tthe Attributes field is populated automatically if an instructor was assigned attributes through Instructor Maintenance (Daily > Academic Records > Instructor Maintenance > HR Info (tab) > Instructor Attributes (button)) or Staff Maintenance (Setup > Staff > HR Info (tab) > Instructor Attributes (button)).



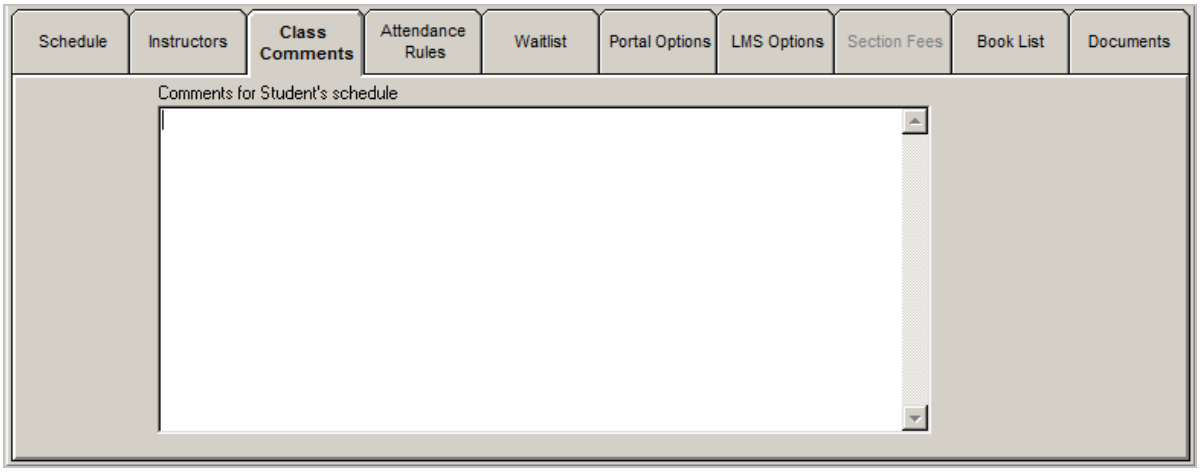
To assign attributes to an instructor:

1. Select the instructor from the **Instructor** column on the left.
2. Select one or more attributes from the **Attributes** column on the right.
3. If the instructor is designated as primary instructor, select the **Primary** check box..

   Note: Any instructor in the list not marked as primary is secondary by default.
4. To modify the instructor **Rank**, select the instructor row to be modified, and click the up arrow to raise the instructor's rank or click the down arrow to lower the instructor's rank.
5. Click **Save**.

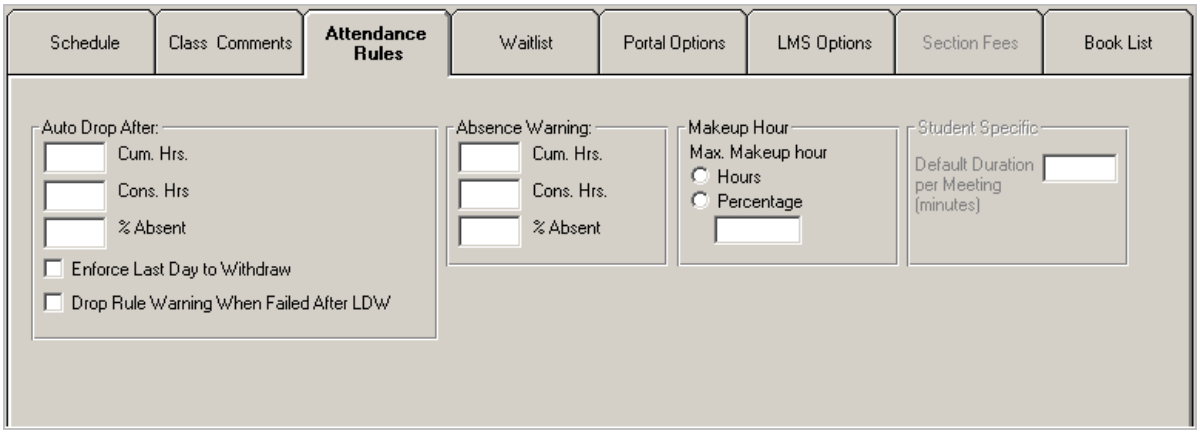
Class Schedule - Class Comments Tab

The Class Comments tab on the Class Scheduling form provides an area to store comments about the class that will appear on the student's schedule.



Class Schedule - Attendance Rules Tab

Use the Attendance Rules tab on the Class Scheduling form to configure auto drop rules, absence warnings, makeup hours, and student specific attendance rules for the class.



Auto Drop After

Use this option to configure Auto Drop settings that automatically cause students registered in a course section to be dropped if they reach the configured absence threshold. Enter any of the three comparison values:

- The number of **cumulative hours** absent that drop the student from the class.
- The number of **consecutive hours** absent that drop the student from the class.
- The **percent of hours absent** that drop the student from the class. This is a value from 000.00 to 100.00. If the value is zero, there is no warning level based on percentage.

The fields Enforce Last Day to Withdraw and Drop Rule Warning When Failed After LDW fields are available only if these options are enabled for the campus (see Campus Information - Academic Records Tab).

- Select **Enforce Last Day to Withdraw** to designate whether students should be automatically withdrawn from courses if they reach the configured absence threshold after the Last Day to Withdraw date. By default, this option is disabled so that the Auto Drop process continues to drop students from courses regardless of LDW date.
- Select **Drop Rule Warning When Failed After LDW** causes a warning to appear on the class roster reports, regardless of whether the student was dropped or not, if the attendance rule failed after the LDW date. By default, this option is disabled.

Note: The Auto Drop logic drops the course automatically on attendance posting if the student's absence time is greater than or equal to the time configured here. If this course is a prerequisite course, and if the campus is configured accordingly (see Description of Fields on the SAP/Grades/Registration Tab), conditional courses are automatically unregistered when this pre-requisite course is automatically dropped due to attendance rules that cause the prerequisite rule to fail. Excused absences are excluded from the auto drop process.

Absence Warning

Select any three of the comparison values:

- **Hours** - The number of cumulative hours absent that set a warning flag on the class section rosters.
- **Cons. Hrs.** - The number of consecutive hours absent that set a warning flag on the class section rosters.
- **% Absent** - The percent of hours absent that set a warning flag on the class section rosters. This is a value from 000.00 to 100.00. If the value is zero, there is no warning level based on percentage and rosters.

Makeup Hour

The Makeup Hour fields are available only if Allow Makeup Hours is enabled for the campus (see Attendance Configuration).

Select **Hours** or **Percentage** on which to base Maximum Makeup Hours:

- **Hours** - The maximum number of makeup hours permitted.
- **Percentage** - The maximum percentage of class time that may be counted toward makeup hours.

Student Specific

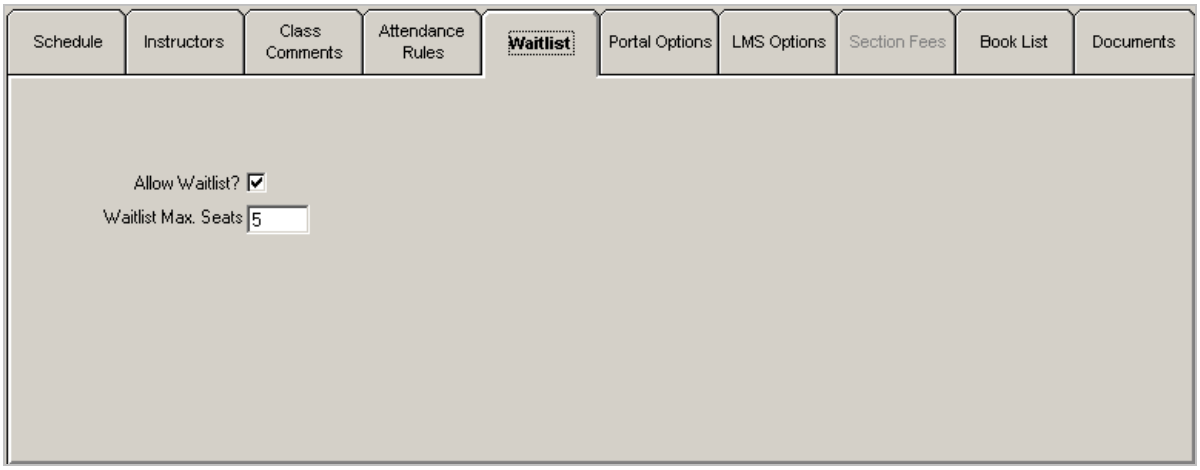
Enter a numeric value between 1 and 999 that represents the maximum number of minutes allowed as a **default time per meeting** for this class. This number represents a 'P' (present) value when posting attendance. See also Attendance, Online Delivery Method, Record Attendance and Record Attendance Dates.

Class Schedule - Waitlist Tab

When you select the Section Delivery Method from the drop-down list of the Class Schedule form, a Waitlist, Waitlist/Auto Add Course Section or Auto Add Course Section tab is displayed. You can configure options as they pertain to the specific tab as they apply to reservations and the automatic creation of new course sections. See also Courses, Course Types, Student Waitlist Defaults.

Waitlist Tab

The Waitlist tab is displayed if the course is not an online course. For example, a lab or lecture course displays the Waitlist tab.

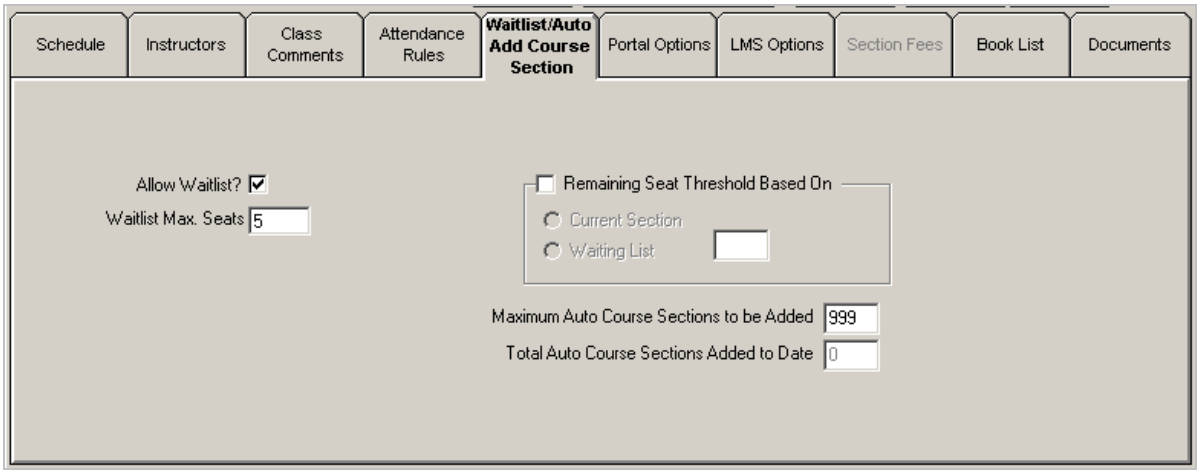


Waitlist Options

1. Select **Allow Waitlist?** if you want students to be placed on a waitlist.
2. Enter the maximum number of reservation seats allowed for the course in the **Waitlist Max. Seats** field.

Waitlist/Auto Add Course Section

If the course has been configured as having a delivery method of online, a course type of online, and the auto add new course section flag is enabled for the course, the **Waitlist/Auto Add Course Section tab** is displayed if the **Section Delivery Method** has been configured accordingly.



See Waitlist options above and set appropriately.

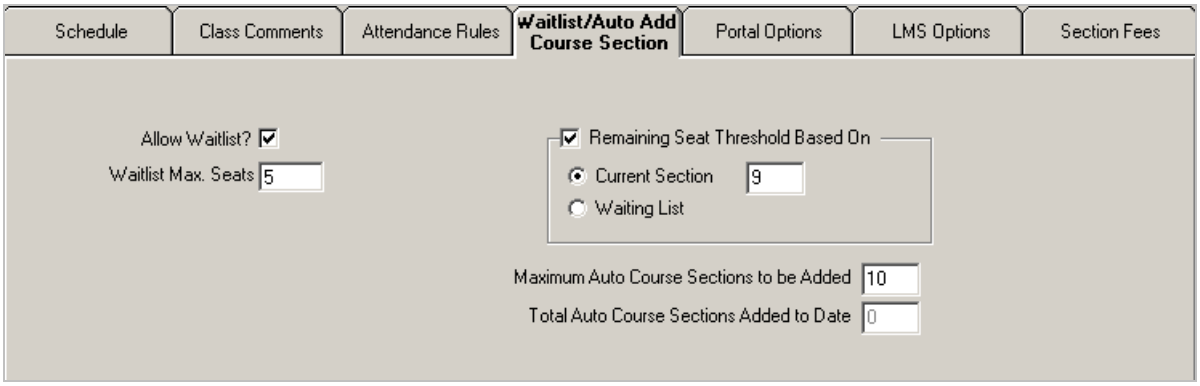
Auto Add Course Section options

1. Select the **Remaining Seat Threshold Based On** check box.
2. If the **Allow Waitlist?** option is enabled, the Remaining Seat Threshold Based On section contains two options: **Current Section** or **Waiting List**.

Current Section

To base the remaining seat threshold on the current section, select the **Current Section** option.

The field next to the Current Section option accepts values between 1 and 999. Enter a value that is less than the **Max. Students** value. An error message is displayed if a value is entered that is not less than the Max. Students field. An entry in the field is required.



Waiting List

- If the Allow Waitlist check box is selected as illustrated above, the Waiting List option is available for selection. Select the **Waiting List** option to base the remaining seat threshold on the waitlist.

  The data entry field to the right of the Waiting List option accepts values between 1 and 999. Enter a value that is less than the Waitlist Max. Seats value. An error message is displayed if a value is entered that is not less than the Waitlist Max. Seats field. An entry in the field is required.

  Note: If the 'Waiting List' threshold is met while registering a student, all students on the waiting list are moved into the new course section.

- If the Allow Waitlist check box is not selected, the Waiting List option is disabled.

3. In the **Maximum Auto Course Sections to be Added** field, enter a number between '0' and '999' representing the number of automatic course sections that may be created. A value of zero prevents any sections from being added automatically. A value of '999' allows an unlimited number of sections to be added automatically.
4. The **Total Auto Course Sections Added to Date** field is a read only field that displays the total number of sections that have been automatically added for this course. This count in this field does not include sections that were created by having been copied manually by staff authorized to do so.

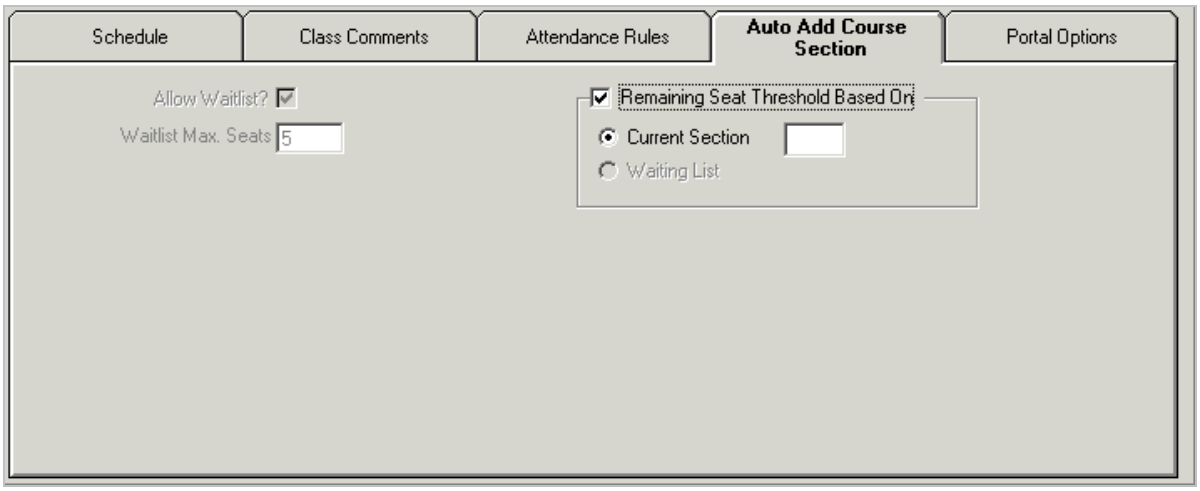
Note: If a section that was automatically added is subsequently deleted, the value in the Total Course Sections Added to Date field is reduced by one (1). The field is not changed if a section that was added manually is deleted.

Auto Add Course Section tab

If the Waitlists are not permitted at the campus, the Auto Add Course Section tab is displayed if this feature is selected when the delivery method is configured for the online course. In this case, the new course sections are added when the current section

reaches the number of students entered in the data entry field beside the **Current Section** radio button, if the **Remaining Seat Threshold Based On** check box is selected.

To enable the field, select the check box, the **Current Section** field becomes enabled, and a number may be entered in the data entry field.



The **Maximum Auto Course Sections to be Added** field represents the number of automatic course sections that may be created for this course. This file accepts values between '0' and '999'. A value of zero prevents any course sections from being automatically added. A value of '999' allows an unlimited number of course sections to be automatically added.

The **Total Auto Course Sections Added to Date** field is a read only field that displays the total number of sections that have been automatically added for this course. This count in this field does not include sections that were created by having been copied manually by staff authorized to do so.

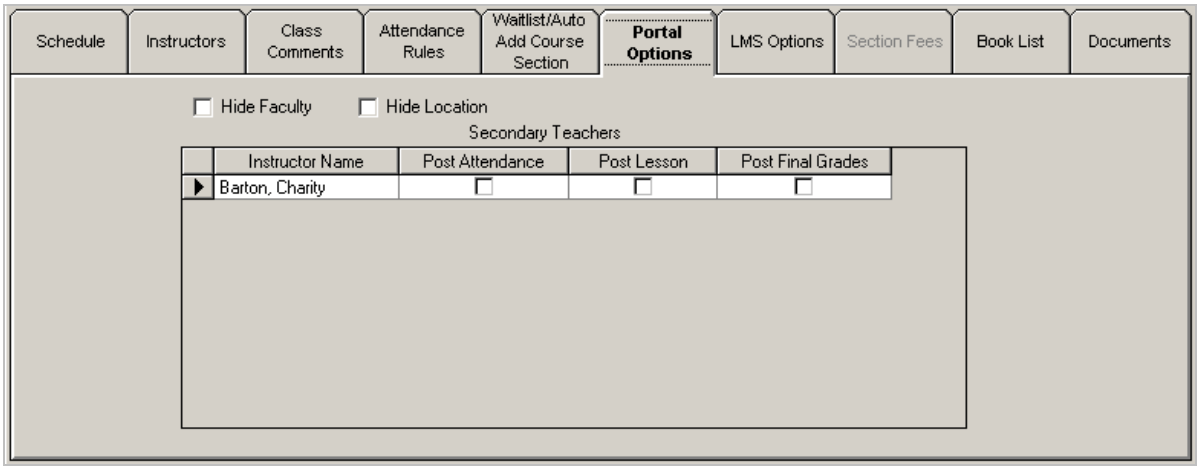
Important Notes

If a section that was automatically added to the system is subsequently deleted, the value in the Total Course Sections Added to Date field is reduced by one (1). The field is not changed if a section that was added manually is deleted.

When a new course section is automatically created, if the Enforce Last Day to Withdraw feature is part of the configuration for the existing course section's campus (**Setup > Campus Locations > Edit/Add > Academic Records (tab) > General (tab)**), the new course section is populated with the LDW date on the existing course section.

Class Schedule - Portal Options Tab

The Portal Options tab on the Class Schedule form provides an area to set options for Portal features.



Hide Faculty

Select this check box to prevent the faculty names for this class from appearing in online forms when using Portal.

Hide Location

Select this check box to prevent the location information for this class from appearing in online forms when using CampusNexus Student.

Note: If a class is copied using the Copy Section or Copy Class Schedule feature, the new class inherits the current settings for **Hide Faculty** and **Hide Location**. After that, each setting can then be changed individually for each class.

Secondary Teachers

The Secondary Teachers grid provides an area to specify the duties that each secondary instructor can perform. Check boxes exist for **Post Attendance**, **Post Lesson**, and **Post Final Grades**. Selecting a check box allows the instructor on that line to perform the task. Any combination can be used.

Class Schedule - Section Fees Tab

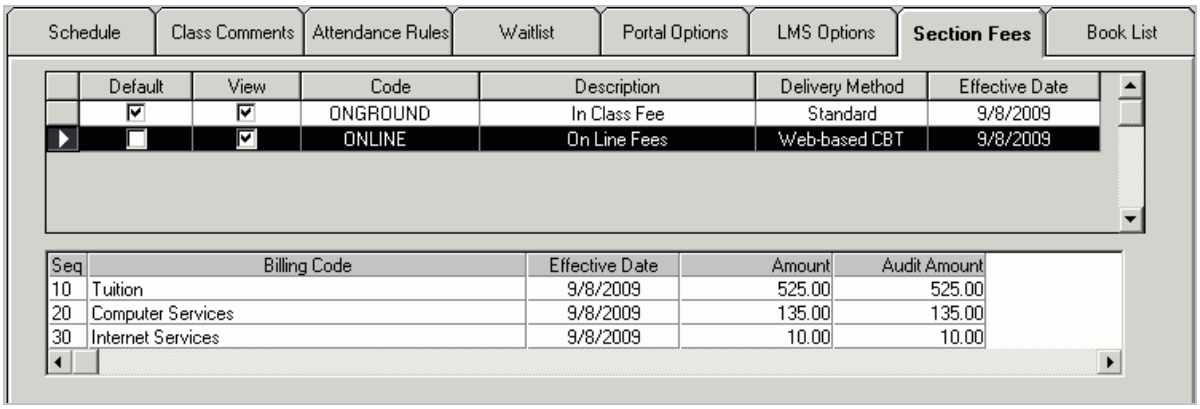
The Section Fees tab on the Class Schedule form is only available if at least one fee schedule configured for the course (Daily > Academic Records > Schedule Classes > Edit > Section Fees tab).

When scheduling a class section, CampusNexus Student allows the registrar to select which course Fee Schedules to use during registration. If multiple fee schedules are configured for the course, CampusNexus Student allows the registrar to select which fee schedules will be viewable during the registration process. The default fee schedule is initially carried over from the course fees folder. The registrar can change the default fee schedule if multiple fee schedules are configured for the course.

All Fee Schedules associated with the course are displayed; however, if a Delivery Method is selected for the Class Schedule, only Fee Schedules associated with the Course and Delivery Method are displayed.

To view the Fees Associated with a Fees Schedule:

Double-click the a Fee Schedule. The fees associated with the Fee Schedule are displayed on the Section Fees tab.



The tab lists all Fee Schedules with their associated course fees. From this tab, set a default Fee Schedule, which will be displayed as the default Fee Schedule when registering courses. You can also determine which Fee Schedules a user should have access to when registering courses.

The Section Fees grid is populated with all Fee Schedules associated with the course once a course is selected from the Course drop-down list. To provide further filtering, upon selection of a Section Delivery Method from the drop-down, the Section Fees tab displays only Fee Schedules associated with that Delivery Method. A fee schedule with a blank delivery method is displayed for all delivery methods.

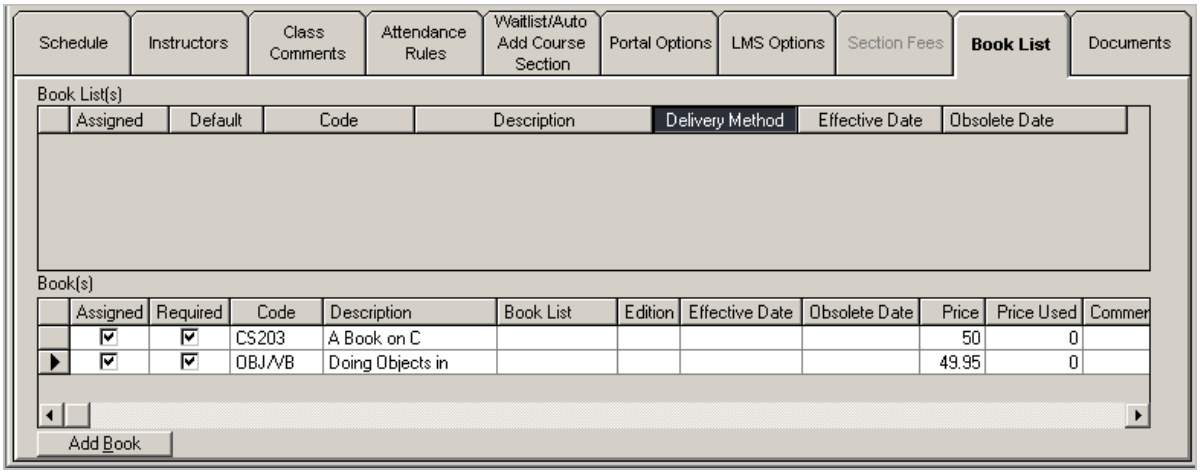
- **Default** – Select this check box to set the Fee Schedule as the default. The default is the first Fee Schedule selected when registering courses.
- **View** – This check box determines if a Fee Schedule is available for selection from the Fee Schedule drop-down list on the course registration wizard.

Class Schedule - Book List Tab

The Book List tabon the Class Scheduling form provides an area to view and update the book requirements for a class section. The book requirements are available to students on their schedules and online via Portal.

The Book List and associated books for the course section may be automatically populated if predefined Default book lists exist in the course configuration under Lists > Academic Records > Courses > Books. When a course section is created, all applicable book lists are displayed in the Book Lists portion of the form. If a book list in the course configuration is set up as a Default book list, the book list are assigned automatically and all applicable books associated with that book list are assigned in the Book(s) area.

Book lists that are not set up to be the default book lists are available for manual assignment to a course section. The Book List fields shown below are populated from the Course Book Lists.



All book lists available for the selected delivery method and those book lists which have the delivery method as blank are displayed. The Book Lists will only be gathered for inclusion in the section if the Start Date of the course section falls in between the Effective Date and Obsolete Date of the Book List, and at least one effective book is associated with the book list.

Note: If a user edits the start date and/or delivery method of the class section, a message will be shown: "The book lists available for selection have been refreshed. Please note, however, that the books assigned based on the previous start date or delivery method (depending on the change that was made) should be unassigned manually." In either of these instances any assigned book list(s) that is/are affected by the change are displayed with a Red background until they are manually removed by clearing the Assigned check box.

The **Assigned** check box in this grid will indicate whether the books associated with the Book List will be included in the **Book(s)** grid at the bottom of the form. The Assigned check box may be selected or cleared. Selecting or clearing the Assigned check box on a book list will select or clear the Assigned check box for all of the book lists associated books.

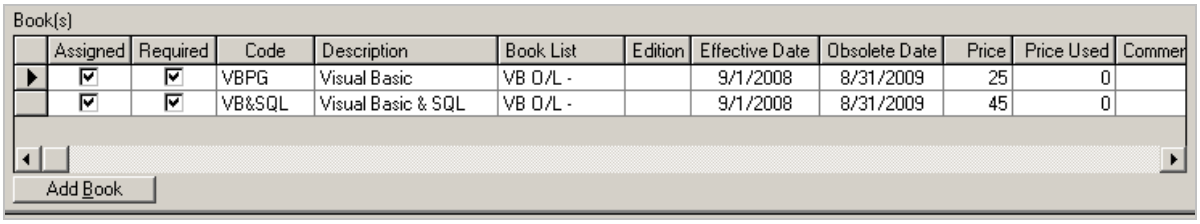
The **Default** check box is selected when the Book List is set up to be default book list in the course configuration. It may not be updated on this form.

Customizing Books for the Course Section

The **Book(s)** grid contains a list of all the books contained in any of the assigned book lists. The book assignments may be modified as required for the specific class section being edited. Any modifications made will only be in effect for the individual class section that is being modified. The specific modifications that can be made are as follows:

- Add an additional book to the class section.
- Unassign a book from the class section
- Select or clear the **Required** flag for a book.

If an institution is not using the predefined Book List functionality that is on the Course configuration, they may assign individual books directly to each individual course section by clicking the **Add Book** button below the Book(s) grid. This feature can also be used to assign additional ad hoc books to class sections that have book lists assigned.



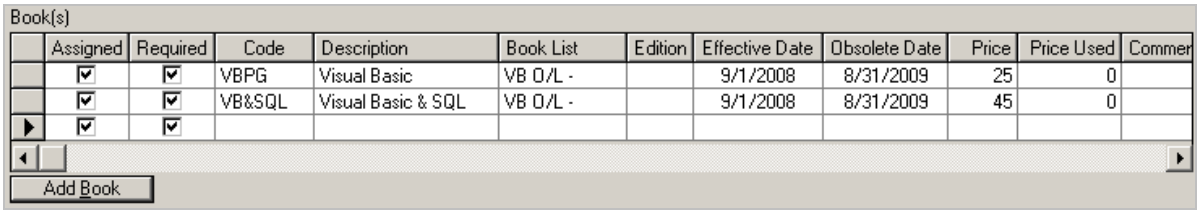
Important: Any modifications made will override information originally copied from the Book List on the course configuration. **Future changes made on the configured course book lists that could affect this course section could override changes that were manually entered in a class section if the user opts to update future class sections when they edit the courses book list configurations**. For example, if the Required flag on a book assigned to a class section is cleared on the class section form, this manual change would be overridden if the class section's course configuration (Lists > Academic Records > Courses > Books) was modified so that a change was made to the books effective or obsolete date in the book list that the book is associated with, and the user says "Yes" to updating future course sections with a date prior to the class section's start date.

Items in the **Book(s)** grid may have their **Assigned** and **Required** attributes modified by placing or removing check marks in the check boxes.

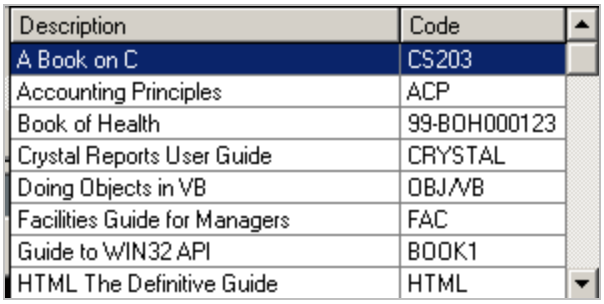
In addition a book may be added to the grid if required.

To add a book:

1. Click the **Add Book** button. A new row appears in the Book(s) grid. The **Assigned** and **Required** check boxes are automatically selected. If a book is to be recommended but not required, clear the **Required** check box.



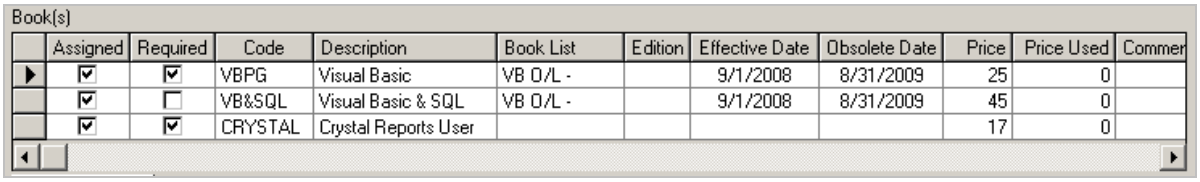
2. To select the Book for the new row, click the **Description** field. A list of books that are maintained in the Inventory table is displayed. This list is maintained by navigating to Lists > Bookstore.



3. Click on the desired title. The row is then populated and the new book information (i.e., Description, Edition, Effective and Obsolete Dates, Prices, Comments) is displayed in the row with the information from the Inventory table.

   Note: You cannot add a book that is already shown in the Book(s) grid. The same book cannot be shown twice.

   To remove a book that has been manually added, clear the Assigned check box on the book.


Book(s)

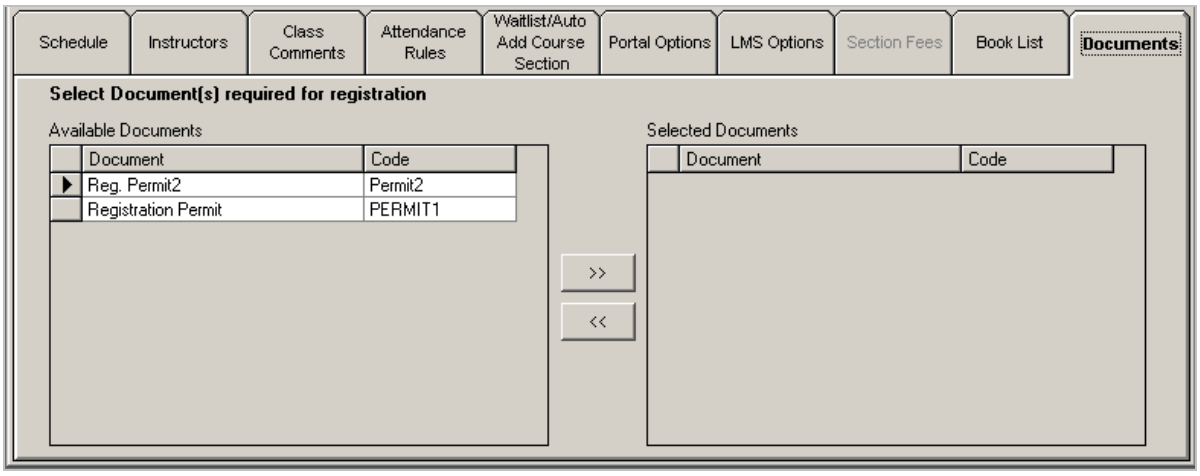
	Assigned	Required	Code	Description	Book List	Edition	Effective Date	Obsolete Date	Price	Price Used	Commer
▶	☑	☑	VBPG	Visual Basic	VB O/L -		9/1/2008	8/31/2009	25	0	
	☑	☐	VB&SQL	Visual Basic & SQL	VB O/L -		9/1/2008	8/31/2009	45	0	
	☑	☑	CRYSTAL	Crystal Reports User					17	0	

4. Click the **Save** button on the Class Schedule form before exiting.

Class Schedule - Documents Tab

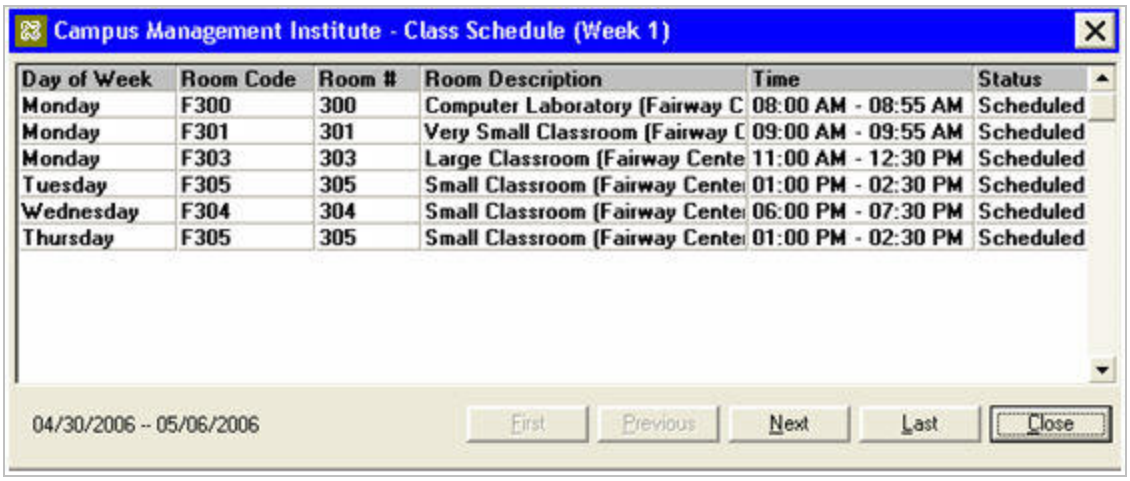
The Documents tab is displayed on the Class Scheduling form under Daily > Academic Records > Edit > Documents tab and provides an area to add and remove the documents required for a class section. Available Documents will be documents that are Active and are Registration Prerequisite documents and that are shared with the campus offering the section and all CRSG campuses. See Documents Code Setup.

Note: Document policy permissions will not apply to setting documents as a course prerequisite or course section level requirement.



View Weekly Schedule

You can click the **View Schedule** or **View Weekly Schedule** button from various locations in CampusNexus Student to access a weekly class schedule. The Class Schedule (Week n) form will appear containing the day of the week, room number, room code and description, the start and end time of the period and the status of the class meeting. See also Schedule Classes and Class Schedule for the locations of the buttons,



The buttons on the bottom of the page are for navigating between pages of schedules (**First**, **Previous**, **Next**, **Last**). The **First** button will return you to the first page, **Previous** button to the previous page, and so on.

Cross Listed Courses

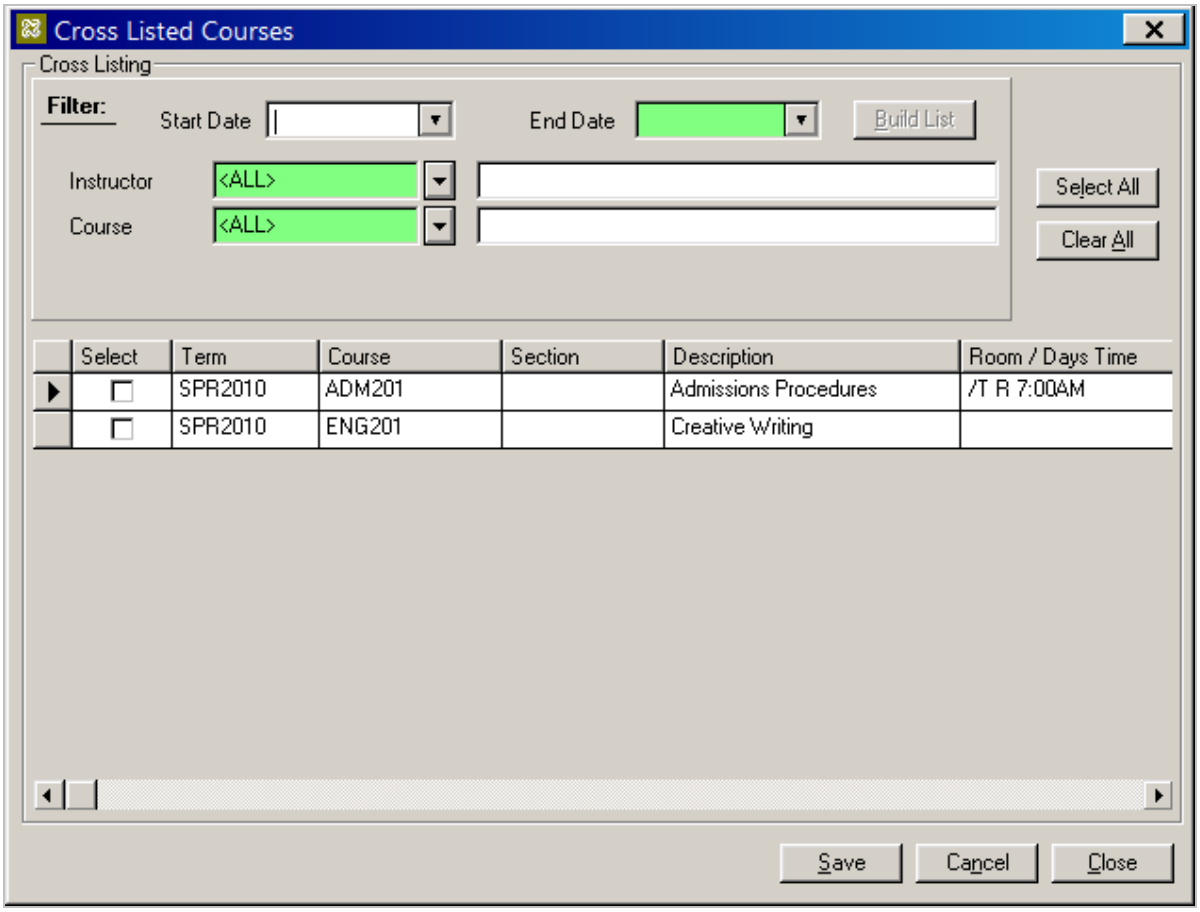
The Cross Listed Courses form displays a grid with all the course sections in the same Term as the current section that are in a campus with cross-listing enabled or are part of the same Course Registration Sharing Group.

Important notes about Cross Listed Courses:

- Maximum class registration is not enforced individually on Cross Listed Courses. When determining if a Cross Listed Course Section is full, the class maximum enforced is the largest value set on all the Cross Listed classes. CampusNexus Student compares this class max value to the total number of students registered in all Cross Listed classes. If the combined total number of students registered is greater than the largest class max setting, the Cross Listed Courses is considered full
- CampusNexus Student uses the same logic described above when determining if there are Waitlist seats available in Cross Listed Course Sections. The number of Waitlist reservations allowed will not exceed the max number of seats enforced for Cross Listed Courses

To cross list a course:

1. Navigate to **Daily > Academic Records > Schedule Classes**, select the course you want to cross list, and double-click it.
2. When the Class Schedule form is displayed, click **Cross List** to view the Cross Listed Courses form.



3. Select all the course sections that you want to cross list with the class you selected on the previous form. Do this

by enabling the check box in the **Select** column for the course sections you want to cross list.

4. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Copy Class Schedule

Copy Class Schedule is available to perform two types of copying tasks:

- Copy all class sections in a source term to a destination term. CampusNexus Student will not insert duplicate class sections in the new term. If there is already an ACC101 Section 1 in the destination term, it will not copy another ACC101 Section 1 into it from the source term.
- Copy the data from one class section to a new class section within the same term.

Note: It is not possible to copy class schedules when using floating terms.

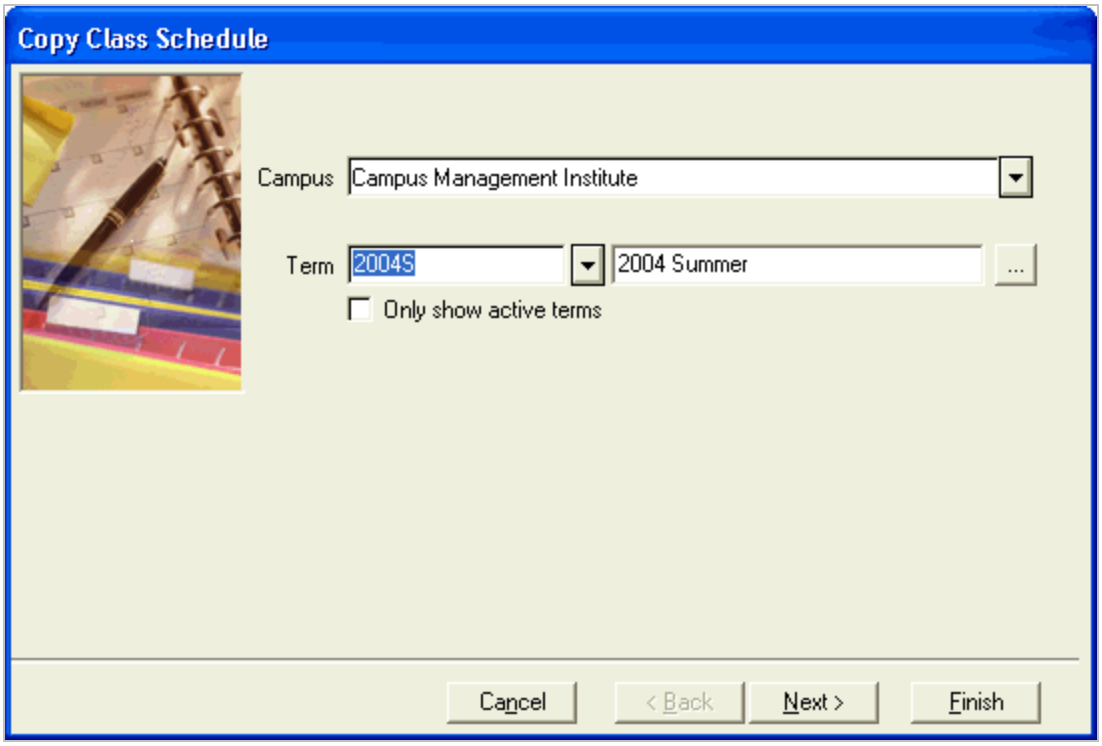
Copy Entire Term

This feature can save you a lot of data entry but once the copy process is completed, you will need to verify that dates, times, locations, and instructors are still valid for the new term.

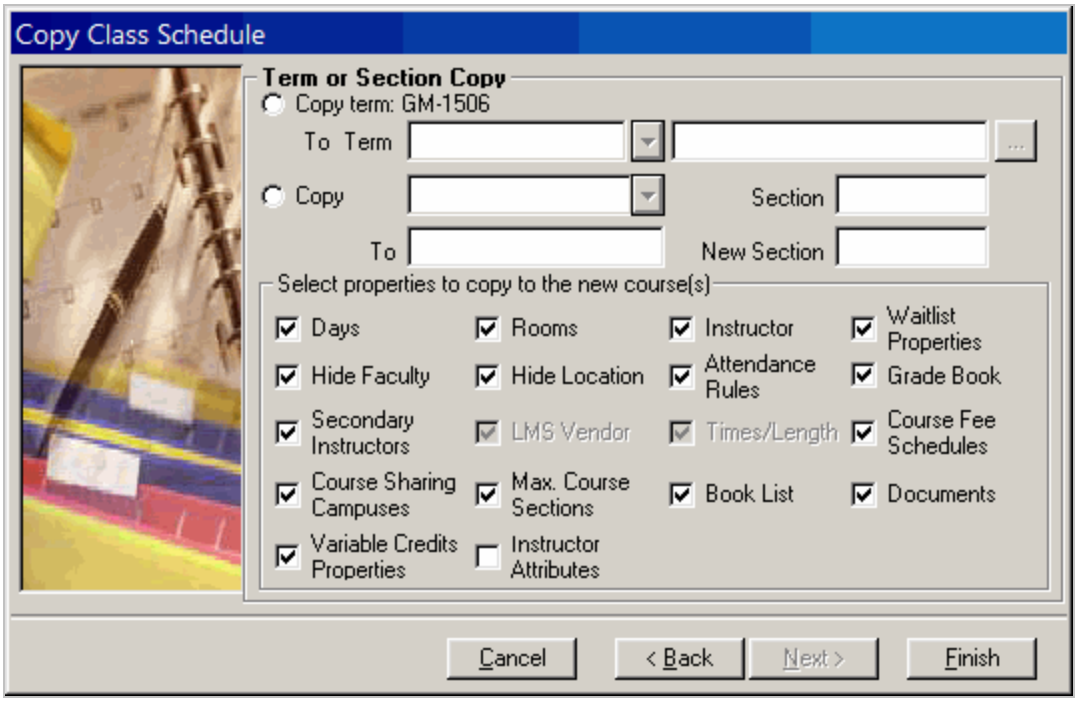
CampusNexus Student provides a wizard to help you through the process of copying one term schedule to another term.

To copy the class schedule from one term to another:

1. Navigate to **Daily** > **Academic Records** > **Copy Class Schedule**. The wizard is displayed.



2. On the first page of the wizard, select the **Campus** and the source **Term**.
3. Click **Next** to proceed. The second page of the wizard is displayed.



4. Click **Copy Term**.
5. Select the **To Term**.
6. Select the properties to be copied to the new courses. You can choose which properties are copied to the new courses and which are not by enabling or disabling the check boxes next to each property.
7. Click**Finish**. CampusNexus Student copies all class sections to the new term. After the copy procedure is complete, the program closes the wizard.

   Important Note:

   If the new term begin and end dates overlap another term, conflicts may occur in room and instructor scheduling. Error messages are displayed if this occurs. Conflicting class sections will not be copied to the new term.
8. Carefully review the beginning and ending dates of the class sections in the destination term. The program inserts the term beginning and ending dates in the new class sections. For example, the Winter 2000 term begins on Monday, January 7th, and ends on Wednesday, April 23rd. You might want to adjust the beginning and ending dates of a class that begins on Tuesday, January 8th, and ends on Thursday, April 24th.

   Important Note:

   When copying all course sections from one term to another, if the Enforce Last Day to Withdraw feature is part of the configuration for the existing course section's campus (**Setup > Campus Locations > Edit/Add > Academic Records (tab) > General (tab)**), the LDW date on all new course sections will be populated with the default LDW date determined in the campus configuration. Also review the locations, time of day, and instructors in the new class sections.

Copy Class Section

This feature can save you a lot of data entry, but once the copy process is completed, you will need to verify that dates, times, locations, and instructors are still valid for the new term.

Note: Multiple course sections can be copied from one term to another, as well as a single course section to another course section within the same term. Regardless of how class schedules are being copied, CampusNexus Student checks if the course section's campus has its '**Add/Drop Flag**' configured to '**S - Course Section Enforced**'. If so, the add/drop date for the new course section(s) will also get copied with the same '**Add/Drop Flag**' configuration and will get populated with a calculated date. In addition, the '**Manual Override**' check box (**Daily** > **Academic Records** > **Schedule Classes** > **New/Edit** button) will be cleared for the new course section(s) because the add/drop date was calculated.

CampusNexus Student provides a wizard to help you through the process of copying one class section to another term.

To copy data from one class section to another:

1. Navigate to **Daily** > **Academic Records** > **Copy Class Schedule**. The wizard is displayed.
2. On the first page of the wizard, select the **Campus** and the source **Term**. If you elected to copy a class section by highlighting a class section on the Class Scheduling form and clicked the **Copy Schedule** button, the Campus, Term, and Course information is entered by the chosen default values and the wizard will skip the first page and display the second page.
3. Click **Next**. The second page of the wizard will appear.
4. Click **Copy Section**.
5. Select the section to be copied.
6. Enter the **To Section** number or code.
7. Select the properties to be copied to the new courses.
8. Click **Finish**. CampusNexus Student copies the data from the "from" section to the new section. After the copy procedure is complete, the program closes the wizard.
9. Carefully review the beginning and ending dates of the destination class section. The program inserts the same beginning and ending dates in the new class section.

   Important Notes:

   When copying one course section to another within the same term, if the Enforce Last Day to Withdraw feature is part of the configuration for the existing course section's campus (**Setup > Campus Locations > Edit/Add > Academic Records (tab) > General (tab)**), the new course section will be populated with the LDW date of the existing course section.

   When copying one course section to another and the existing course section has Last Day to Withdraw Date Manual Override option enabled (**Daily > Academic Records > Schedule Classes > New/Edit**), the new course section's LDW date will not recalculate a default date.

   When a term is copied to a new term and LDW is configured on the campus, new LDW dates that correspond to the new term’s start and end dates will be populated in the LDW date field in the courses in the new term.
10. Also review the location, time of day, and instructor in the new class section.

Each of the course properties listed here can be copied (or not) independently of the other properties.

Course Property Details

Property	Description
Rooms	Select this check box to copy the Room information to the new course.
Wait List Properties	Select this check box to copy the Wait List Properties settings to the new course.

Property	Description
Grade Book	Select this check box to copy the lesson information to the new course.
Times/Length	Select this check box to copy the times or length information to the new course.
Hide Faculty	Select this check box to copy the Hide Faculty option setting to the new course.
Days	Select this check box to copy the date information (start date, end date, meeting dates) to the new course.
Hide Location	Select this check box to copy the Hide Location option setting to the new course.
Course Fee Schedules	Select this check box to copy the Course Fee Schedules to the new course.
Instructor	Select this check box to copy the Instructor information to the new course.
Secondary Instructors	Select this check box to copy the Secondary Instructor information to the new course.
Attendance Rules	Select this check box to copy the Attendance Rules settings to the new course.
LMS Vendor	Select this check box to copy the LMS Vendor information to the new course.This check box is displayed only if one or more LMS Vendors are configured for the Campus and the original course has an LMS Vendor selected.
Book List	If selected, this will copy the book list(s) and all assigned books on the existing course section and assign the exact book list(s) and books to the new course section. If the check box is cleared, only the default book list(s) and corresponding books contained in the course configuration will be assigned to the newly created course section.
Course Sharing Campuses	Select this check box to copy the Campuses that are shared to the new course.
Max Course Sections	Select this check box to copy the Max Course Sections to the new course.
Documents	Select this check box to copy the required documents to the new course.
Variable Credits Properties	Select this check box to copy the Variable Credits Properties such as Allow Override, Credits, Min Credits, Max Credits fields from the class section to the new class section. If this check box is not selected the properties contained in the Course Code Setup form will be copied to the new class section.
Instructor Attributes	If this check box is selected, instructor attributes will be copied to the new class schedule. If the Instructor and Secondary Instructors options are not selected, the Instructor Attributes check box will be disabled. By default, the Instructor Attributes option will be cleared.

Edit Class Scheduling and Attendance

Class schedules often change after the class has started. CampusNexus Student enables you to:

- Change the class schedule without losing any attendance history that may have already been posted to students in the class.
- Modify the start and end dates of the class. The modification to the class updates any students that are currently registered for the class.
- Define an "inconsistent schedule" to define each day that the class meets and the meeting time on that date.

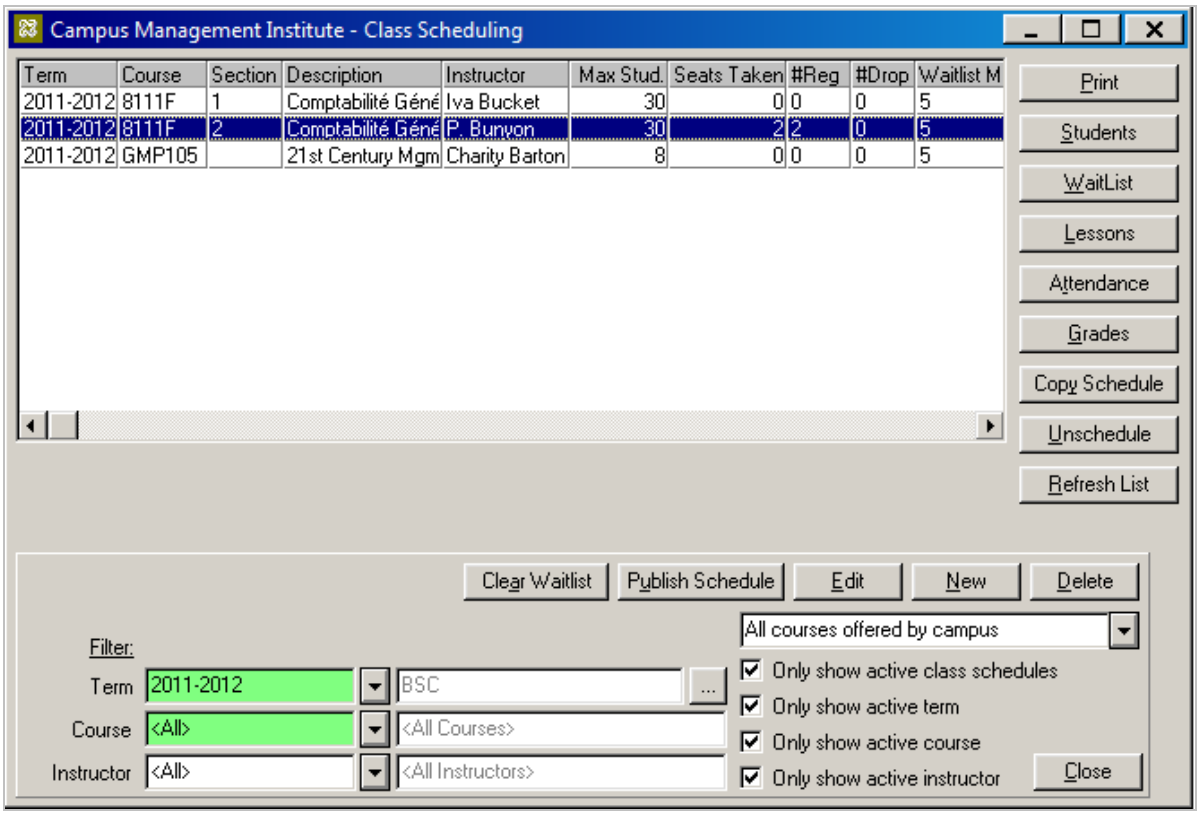
Each class date can be modified. Each class-meeting day for a scheduled class can have a different start time, class length, instructor, or room. When a class schedule is changed, any attendance that has already been recorded is retained.

When a class schedule is saved, the Class Attendance table is updated by adding a record for each meeting from the class start date to the class end date.

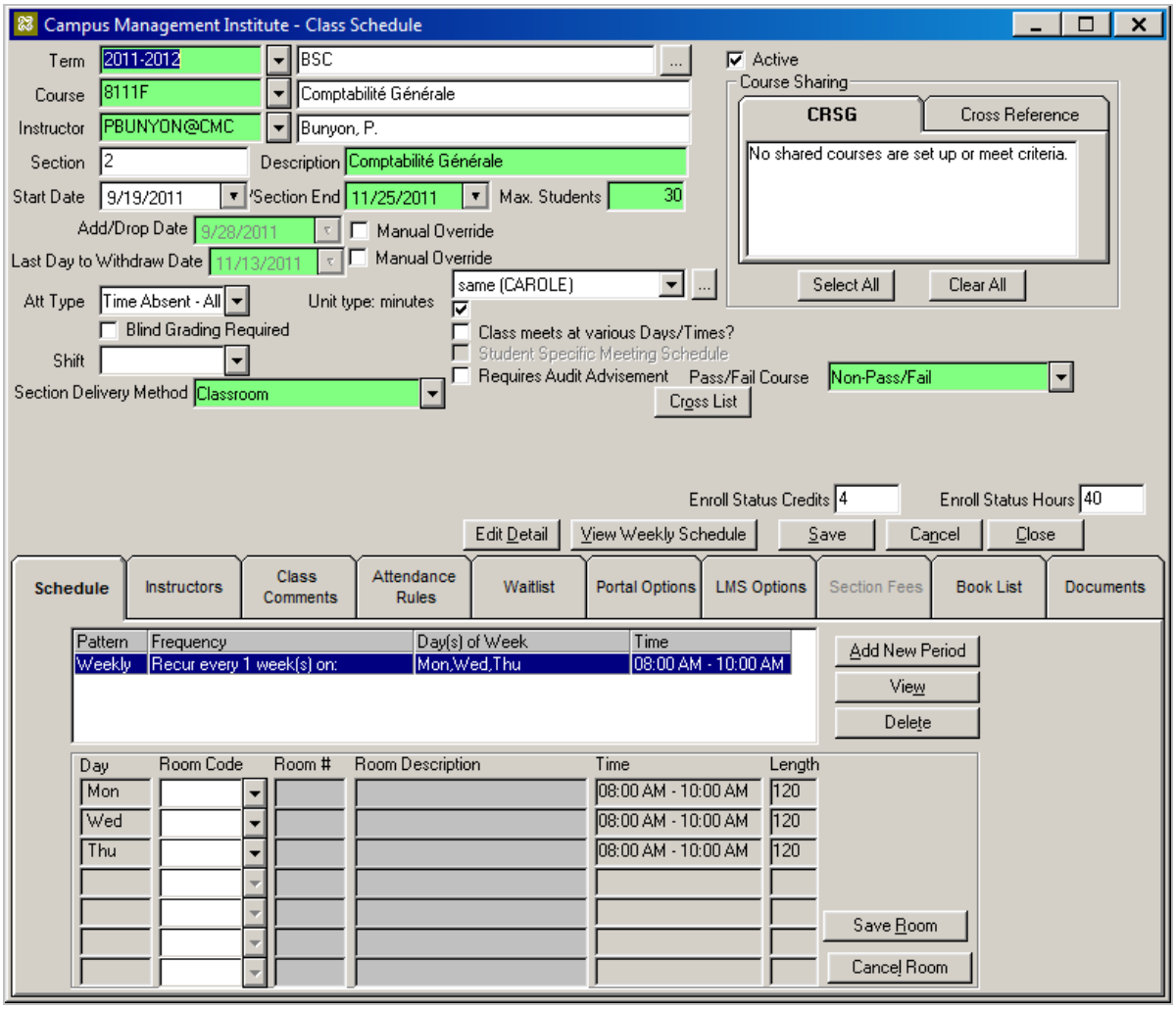
Calendar views are available on the Class Scheduling and Attendance recording forms.

To modify the detail schedule:

1. Navigate to **Daily > Academic Records > Schedule Classes**. The Class Scheduling form is displayed.

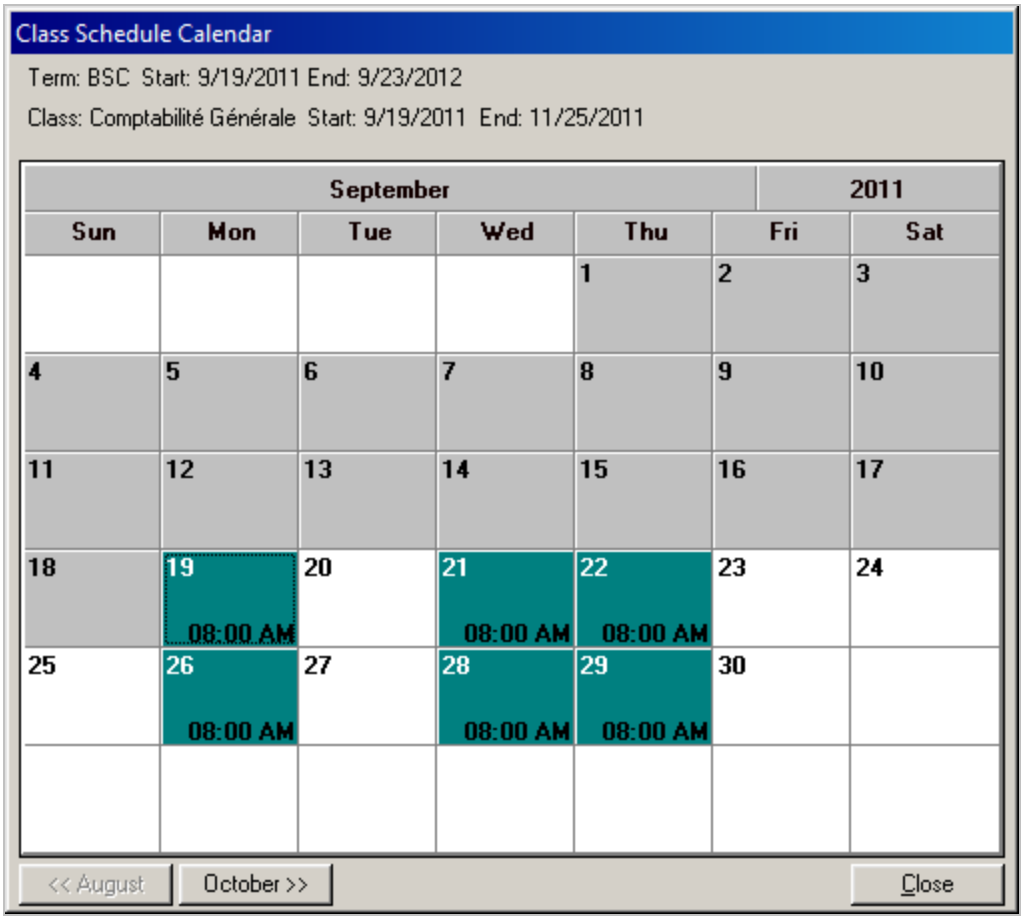


2. Select a **Term** and **Course** and click **Edit**. The Class Schedule form is displayed.

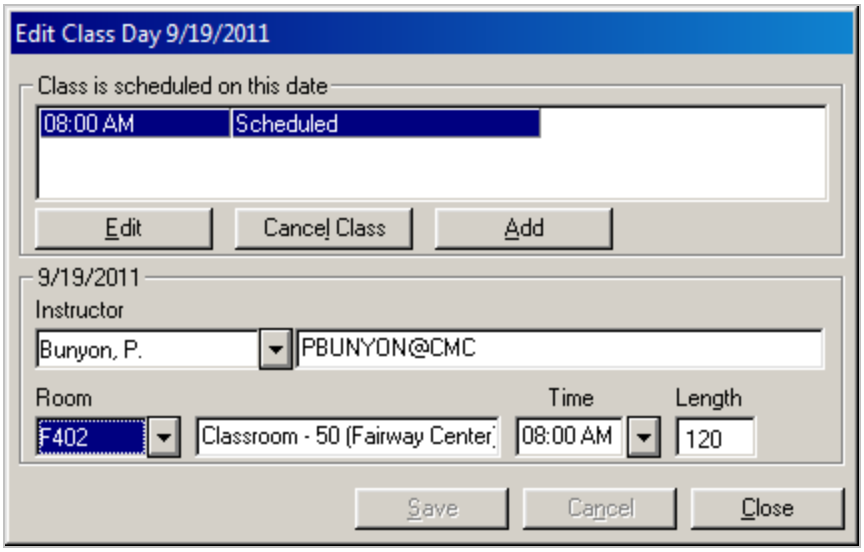


3. Click **Edit Detail**. The Class Schedule Calendar form is displayed. The calendar days are color-coded as follows:

   - GRAY - Date is outside of the Term Start/End Dates
   - GREEN - Attendance Not Recorded
   - YELLOW - Attendance has been recorded
   - BLUE - Holiday
   - WHITE - Class does not meet or was canceled



4. Double-click a date (that is not gray) to edit the schedule for the selected date. The Edit Class Day form is displayed.



5. Click the Edit, Cancel Class, or Add button and modify the schedule as needed.

   Note: You cannot add any class meeting times on holidays.

6. Click **Save**.

Any schedule changes will update the Class Attendance table as follows:

- Dates after the class Last Date Attended (LDA) (if attendance has previously been recorded), or all dates (if attendance has not been recorded) where the status is not "P", will be adjusted to match the new class schedule meeting times.
- If attendance has already been posted, a message indicates that the students for whom the attendance was posted will be changed to match the new date.
- If the class length is changed, CampusNexus Student adjusts the time attended and time absent to match the new class length.
- If a posted attendance date is canceled, a message indicates that the posted attendance will be deleted. If you continue, all attendance records for the selected attendance ID will be deleted, and each student's total attendance values and Last Date Attended (LDA) will be recalculated.

When you modify the scheduled start and end dates, CampusNexus Student updates any registered students where the student registration start and end dates match the old start and end dates.

- CampusNexus Student deletes any attendance that was recorded for dates no longer in the schedule.
- CampusNexus Student adds new Class Attendance records for meeting times that are added to the schedule.

The roster procedures use the Class Attendance table. This table contains all class meeting dates and times to print on the roster. The roster print form prompts you for a start date and end date to print. If you select a date range that has more than 10 meeting times, a message is printed on the attendance roster indicating that the class meets more than 10 times in the selected date range. (Printed rosters can only print up to 10 class-meeting times).

The routines for printing SCANTRON attendance rosters use the Class Attendance table when printing the rosters.

When attendance is posted, CampusNexus Student sets the Class Attendance Status to "P" and moves the Class Attendance ID to each Attendance record that is added or updated.

If a student is registered into a class with no start or end dates, CampusNexus Studentwrites Class Attendance records for each date for which the student is registered. This only occurs for classes that have no start or end date AND that have scheduled meeting times set up.

When a class section is copied, CampusNexus Student populates the Class Attendance table with the new dates for the new class being added.

Attendance recording no longer requires you to record the Next Day of Attendance. The Calendar button on the attendance form displays the calendar. Double-click on any of the "colored" dates (except gray) to view the list and highlight the selected day of the month.

The Unschedule button on the Class Schedule form updates the Class Attendance table and sets the status to "C - Canceled". If the attendance was previously recorded, the attendance is recalculated and the attendance totals and LDA for each student is updated.

Floating Term Class Scheduling

Floating term class scheduling means that one roster will be produced for students who are scheduled for the same class but attending under different terms. This accommodates schools that may have starts every 5 weeks but the semester length is 15 weeks.

This affects several functions in CampusNexus Student. The forms discussed in this topic show visible changes when floating terms are used. Please refer to the linked topics for specific instructions on how each form is used.

Setup > Campus Locations > Academic Records

A new field was added to the setup form that will specify whether the campus will use floating term scheduling or not. The new field is displayed directly underneath the "Re-take Methodology" field. The caption is "Use Floating Term Scheduling?" The options are Yes and No. No is the default. The value specified in this field is stored in SyCampus.FloatingTerm.

If a campus elects to use floating term scheduling, they will be allowed to attach a single class to multiple terms. If the campus is not using floating term scheduling, a scheduled class will be attached to only one term.

Daily > Academic Records > Schedule Classes

If the campus is set up to do floating term scheduling (SyCampus.FloatingTerm = 1), a Start Date column will replace the Term column.

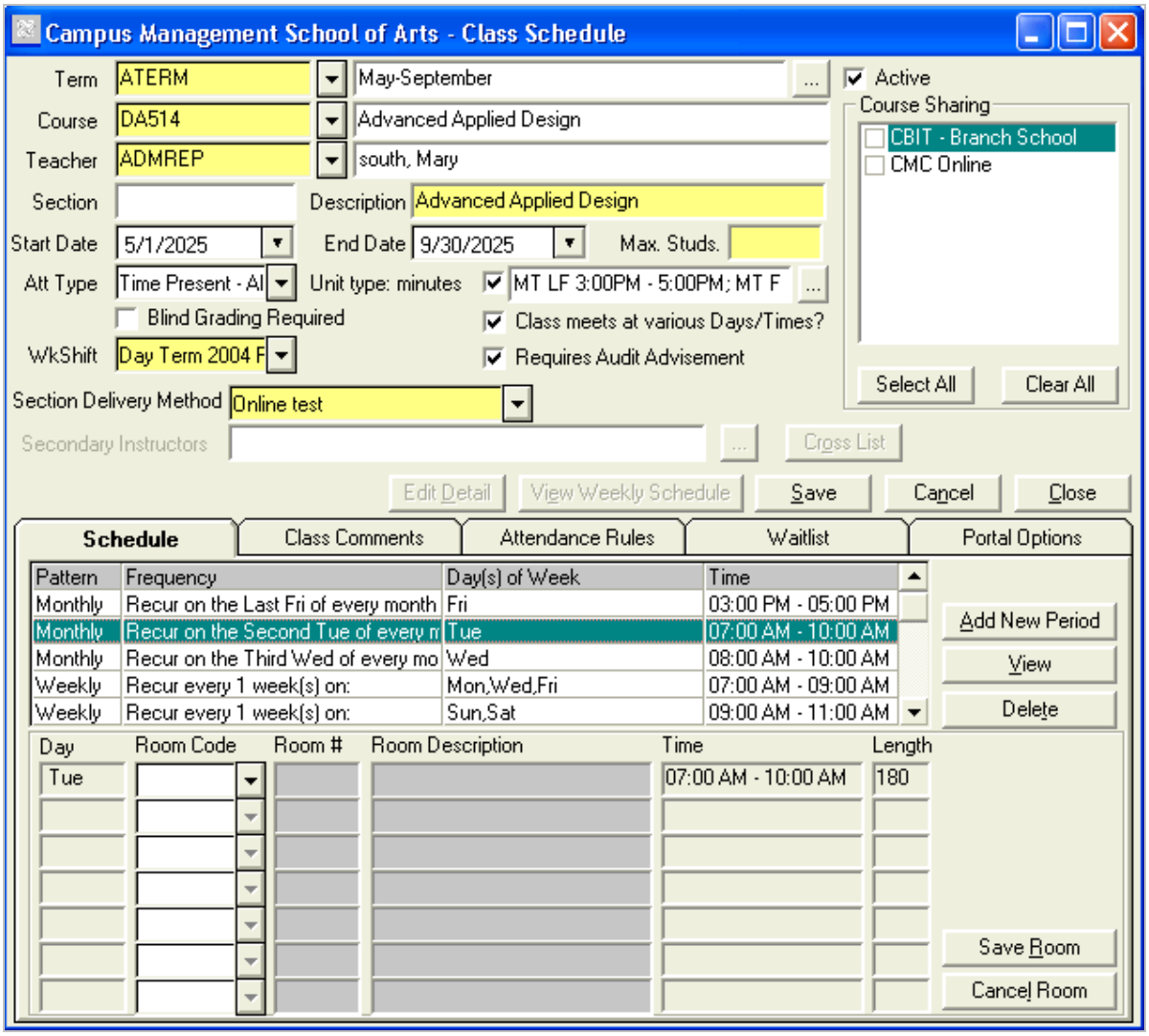
The start date for each course listed is pulled from AdClassSched.StartDate. If the campus is not set up to do floating term scheduling, the layout of the grid remains unchanged.

For campuses where the floating term scheduling flag is set to Yes, the filter on Term on form (frmAdClassSched) is replaced with a Start Date range filter. If the campus is not set up to do floating term scheduling, the logic of the filter section will remain unchanged.

Daily > Academic Records > Schedule Classes > New
Daily > Academic Records > Schedule Classes > Edit

If the campus is set up to do floating term scheduling, the ability to attach multiple terms to a scheduled class is added in the term class schedule form (frmAdClassSched).

A modification occurs in the Term selection. Previously, only one term could be selected. If the campus is doing floating term scheduling, the user is allowed to select multiple terms. If your school is set up for floating terms, you can click the button to select more than one term from the drop-down list. This button will appear on the form only if your school uses floating terms.



The logic for building the term drop-down list is the same. However, the following items should be noted:

1. Previously, a validation forced the class section start date and the class section end date to be within the term start and end dates. Since CampusNexus Student now allows multiple terms to be attached to the class section, this validation occurs for each term. The class section start and end dates must be within the date range of ALL terms attached to the class.
2. When updating, a row is added to AdClassSchedterm for each term attached to the class. This logic will be executed regardless of whether the campus is doing floating term scheduling. If the campus is not doing floating term scheduling, AdClassSched and AdClassSchedTerm will have a one-to-one relationship.
3. When editing a class section, and the terms attached to the class are edited, the program will not allow a term to be unselected if any students are scheduled for the class in the specified term.
4. If the term or terms attached to the class section are edited, the program deletes any row or rows from AdClassSchedTerm for terms that are no longer attached to the class section.

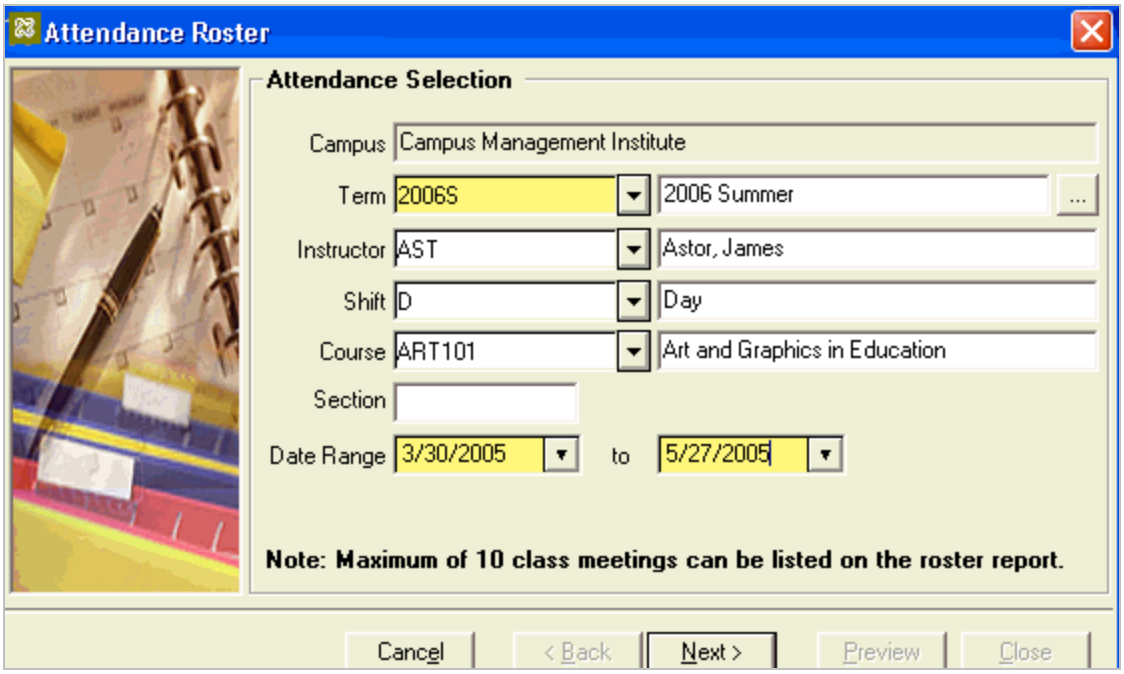
Daily > Academic Records > Schedule Classes > Print

The Schedule Classes form has a Print button on it that will generate a report of class sections scheduled based on the specified criteria. The queries on this report have been updated to correctly handle the new AdClassSchedTerm table. In addition, if the

campus is set up to do floating term scheduling, the filter criteria have been modified to select on start date range instead of a term.

Daily > Academic Records > Attendance > Rosters

When printing rosters for a campus where the floating term flag is set to Yes, the filter on Term is replaced by a filter on class start date.



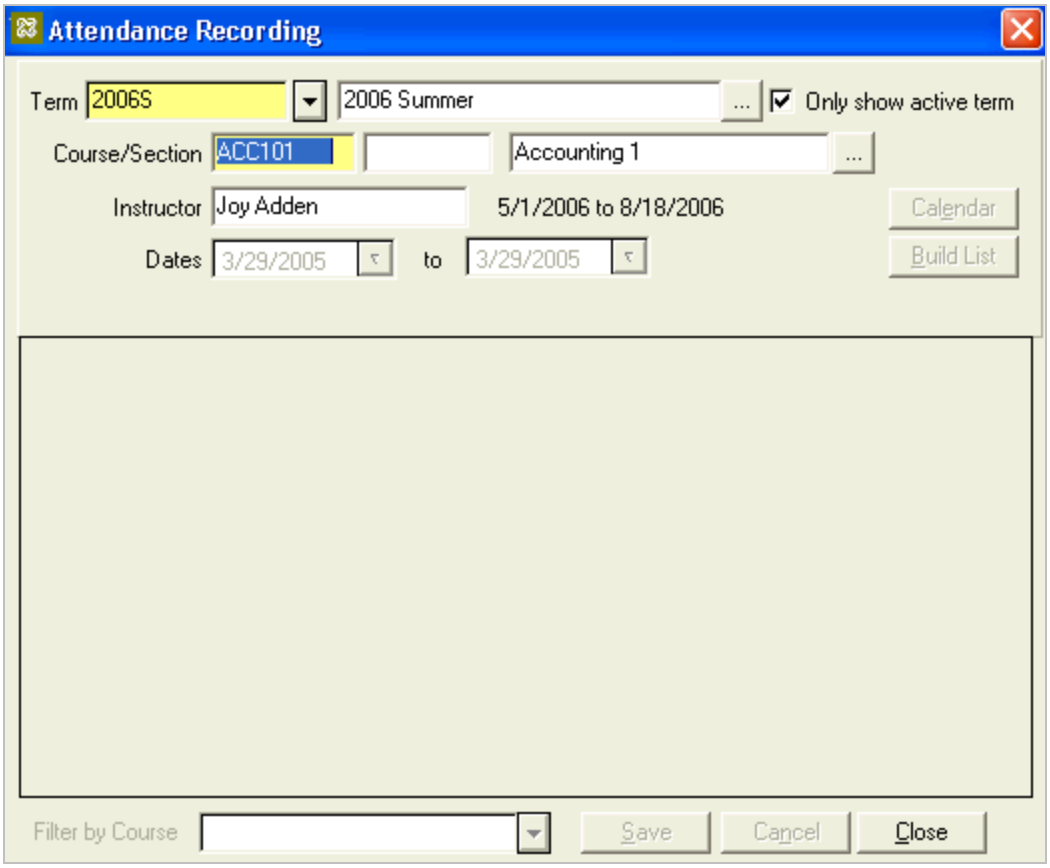
Regardless of whether the campus is using floating term scheduling, the query for gathering the rosters has been modified to use the AdClassSchedTerm table to determine the term for each class section. In addition, the query will filter on the start dates of the class sections if the Start Date range criteria apply. The start date of each class section is stored in AdClassSched.StartDate.

Daily > Academic Records > Attendance > Record Attendance

The filter on Term is replaced by a filter on class start date when recording attendance for a Campus that is set up to do floating term scheduling.

Previously, the user specified a term, which then built the class section pick list. From this list, the user could choose the class section for which to post attendance. If a campus is not set up to do floating term scheduling, the layout of this form remains unchanged. However, the query to build the class section pick list has been modified to use the AdClassSchedTerm table.

If a campus is set up to do floating term scheduling, the criteria portion of the form will appear as shown below.



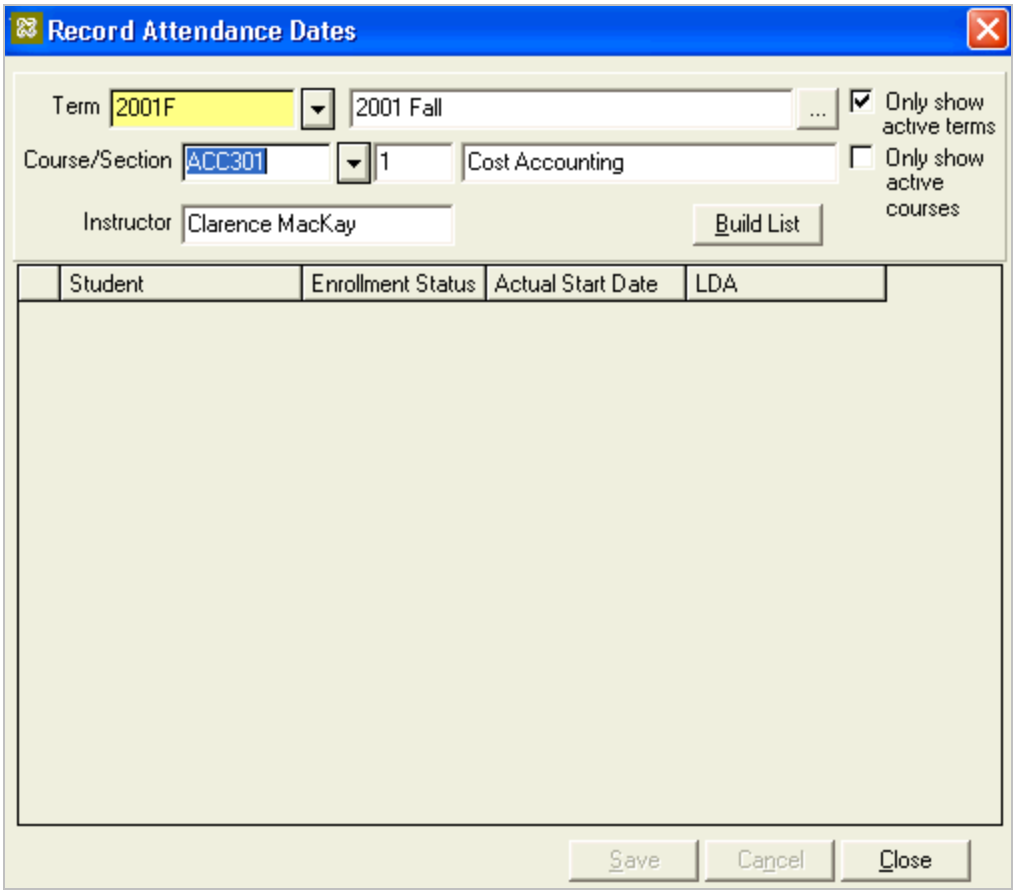
When the user specifies the start date range, all class sections will be added to the pick list where AdClassSched.SyCampusID matches the campus currently logged into AND AdClassSched.StartDate is within the specified date range.

Daily > Academic Records > Attendance > Record Attendance Dates

When recording attendance dates for a campus where the floating term flag is set to Yes, the filter on Term has been replaced by a filter on class start date.

Previously, the user specified a term, with which the program built the class section pick list. From this list, the user could choose the class section for which to record attendance dates. If a campus is not set up to do floating term scheduling, the layout of this form will remain unchanged. However, the query to build the class section pick list has been modified to use the AdClassSchedTerm table.

If a campus is set up to do floating term scheduling, the criteria portion of the form will appear as shown here.



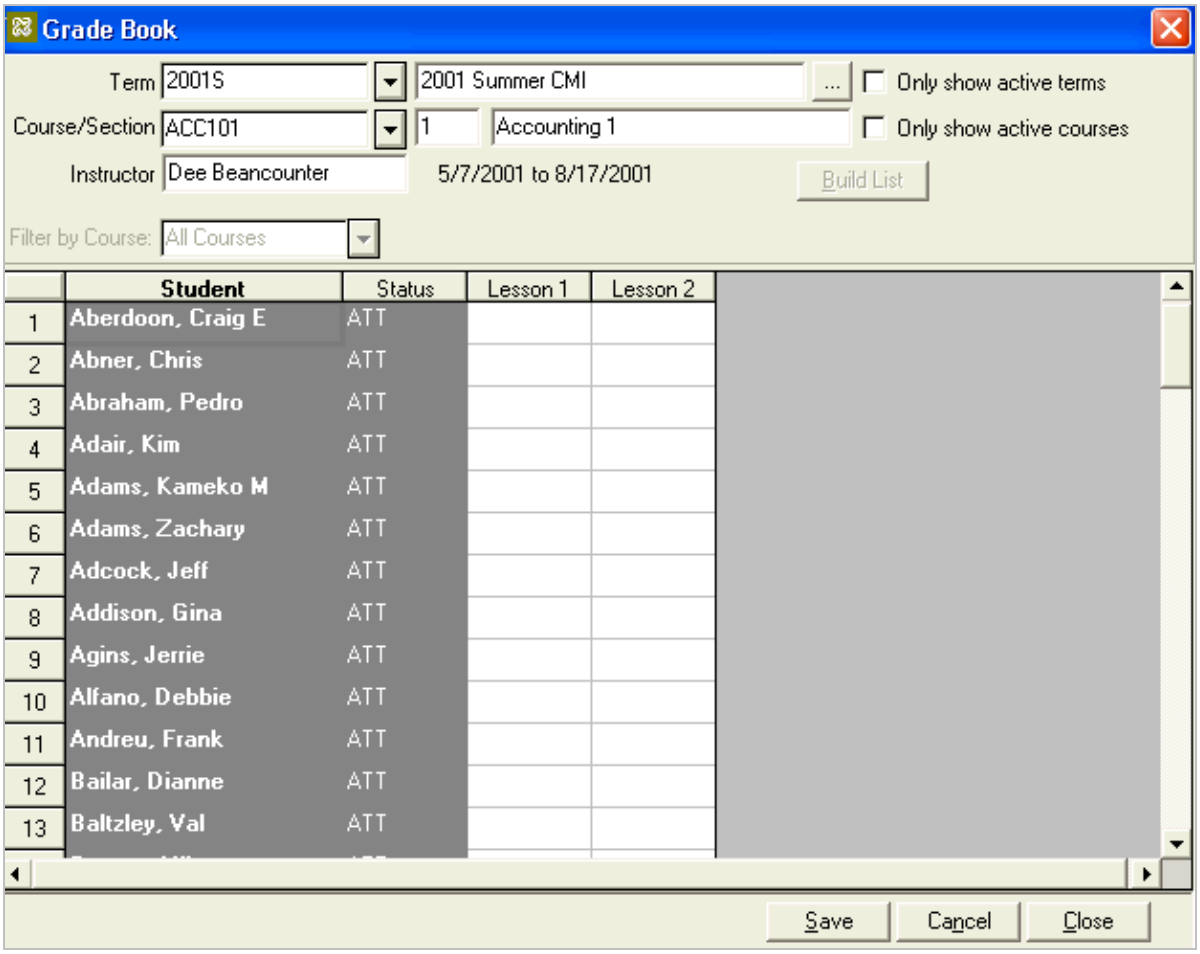
When the user specifies the start date range, all class sections will be added to the pick list where AdClassSched.SyCampusID matches the campus currently logged into AND AdClassSched.StartDate is within the specified date range.

Daily > Academic Records > Grade Book

For a campus where the floating term flag is set to Yes, the filter on Term will be replaced by a filter on class start date when entering lesson scores in the Grade Book.

Currently, the user specifies a term, which is used to build the class section pick list. The class section for which to enter lesson scores is chosen from this list. If a campus is not set up to do floating term scheduling, then the layout of this form will remain unchanged. However, the query to build the class section pick list has been modified to use the AdClassSchedTerm table.

If a campus is set up to do floating term scheduling, the criteria portion of the form will appear as shown here.



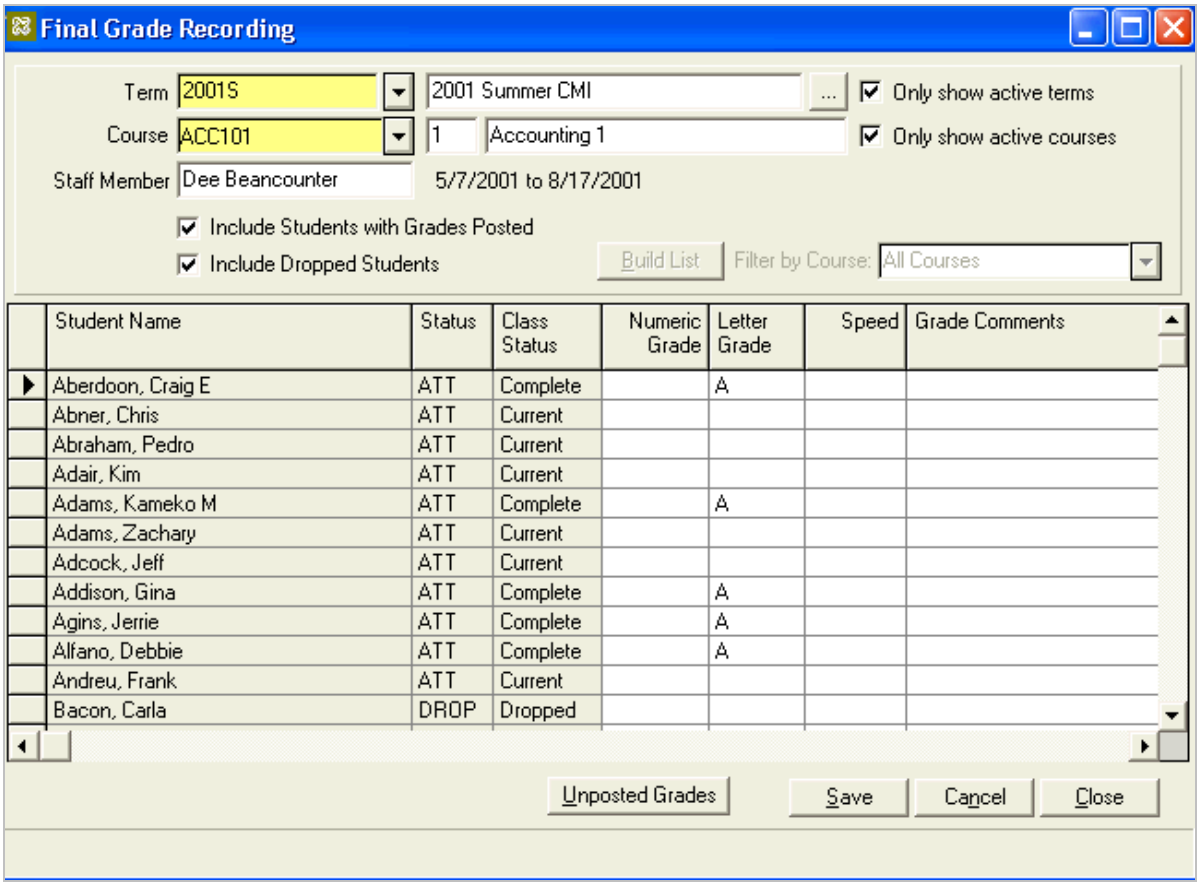
When the user specifies the start date range, all class sections will be added to the pick list where AdClassSched.SyCampusID matches the campus currently logged into AND AdClassSched.StartDate is within the specified date range.

Daily > Academic Records > Final Grades

For a campus where the floating term flag is set to Yes, the filter on Term will be replaced by a filter on class start date when recording final grades.

Previously, the user specified a term, which was used to build the class section pick list. The class section for which to post final grades was chosen from this list. If a campus is not set up to do floating term scheduling, then the layout of this form will remain unchanged. However, the query to build the class section pick list has been modified to use the AdClassSchedTerm table.

If a campus is set up to do floating term scheduling, the criteria portion of the form will appear as shown here.



When the user specifies the start date range, all class sections will be added to the pick list where AdClassSched.SyCampusID matches the campus currently logged into AND AdClassSched.StartDate is within the specified date range.

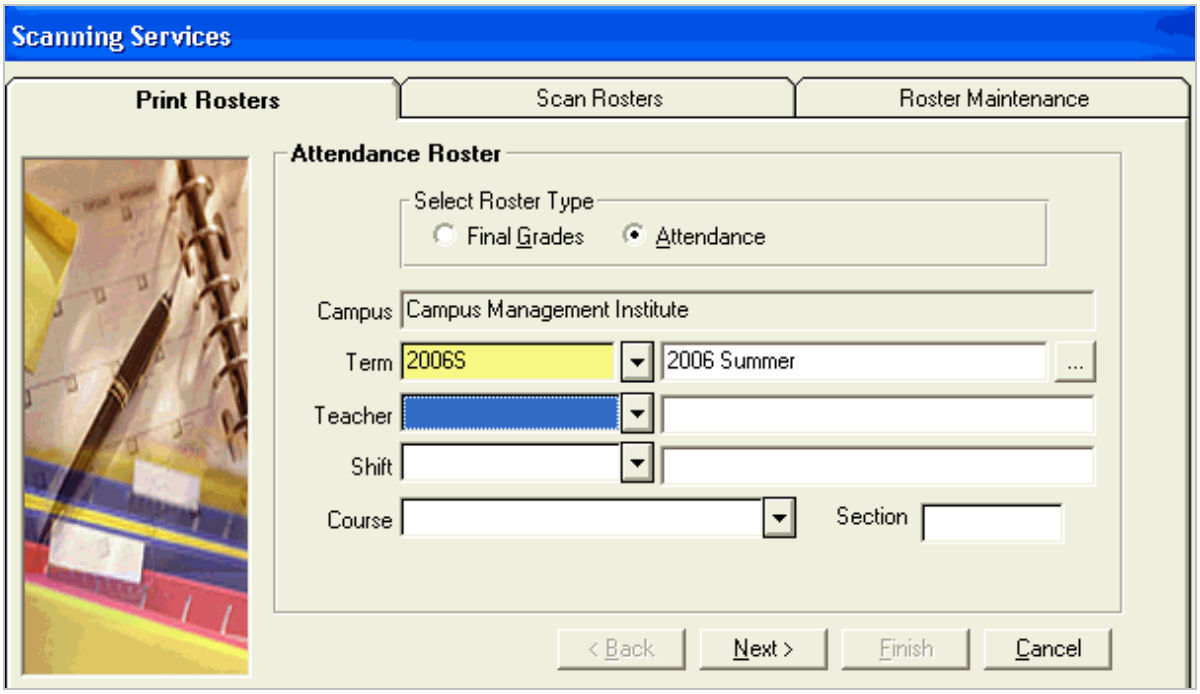
Daily > Academic Records > Final Grades > Unposted Grades

If the current campus has the floating term flag set to Yes, the logic for listing courses when the Unposted Grades button is clicked on the Final Grades form (frmAdFinalGrades) will be modified to use the class start date filter. This option produces a report showing class sections that have not yet had final grades posted. If the campus is set up to do floating term scheduling, the query for this report has been modified to filter against the start date criteria instead of a term.

Daily > Academic Records > Scantron > Print Scantron Rosters

For a campus where the floating term flag is set to Yes, the filter on Term will be replaced by a filter on class start date when printing rosters for SCANTRON®.

If a campus is set up to do floating term scheduling, a start date range will replace the term criterion.

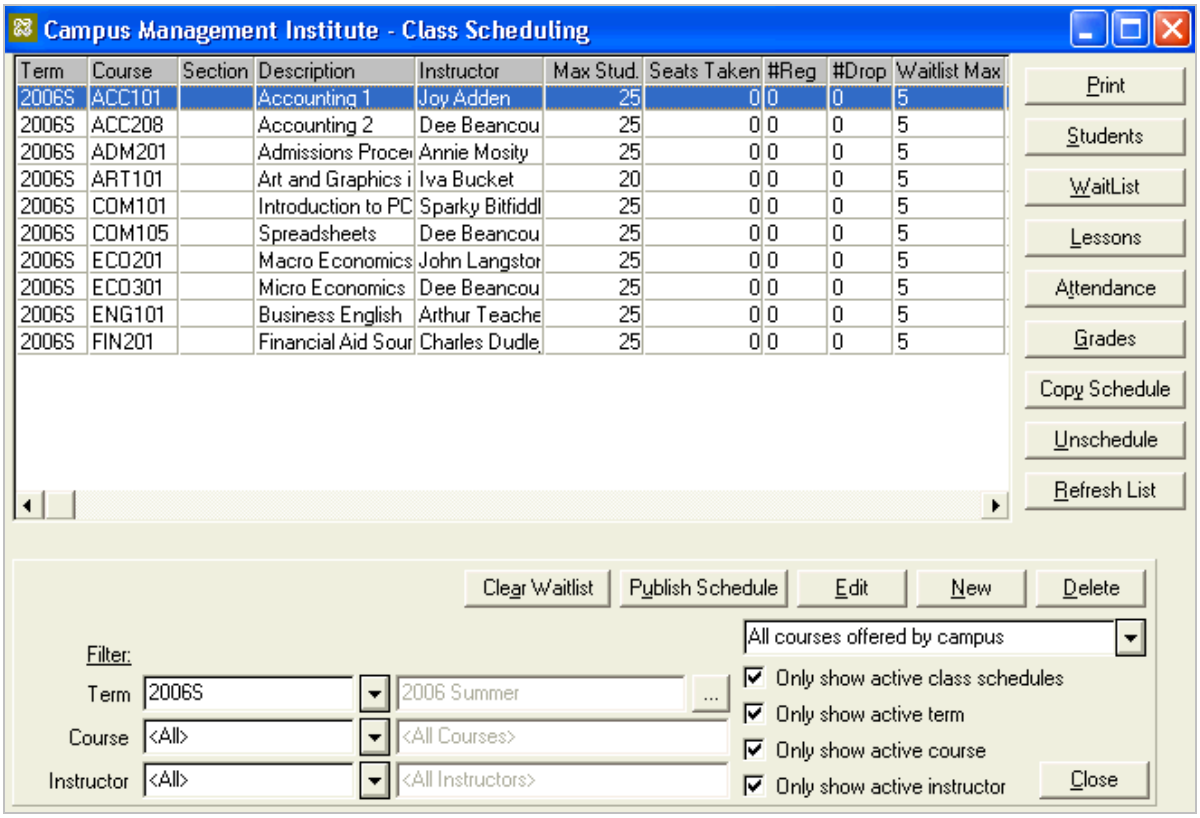

Scanning Services
Print Rosters
Scan Rosters
Roster Maintenance
Attendance Roster
Select Roster Type
Final Grades
Attendance
Campus
Campus Management Institute
Term
2006S
2006 Summer
Teacher
Shift
Course
Section
< Back
Next >
Finish
Cancel

Students in Scheduled Class

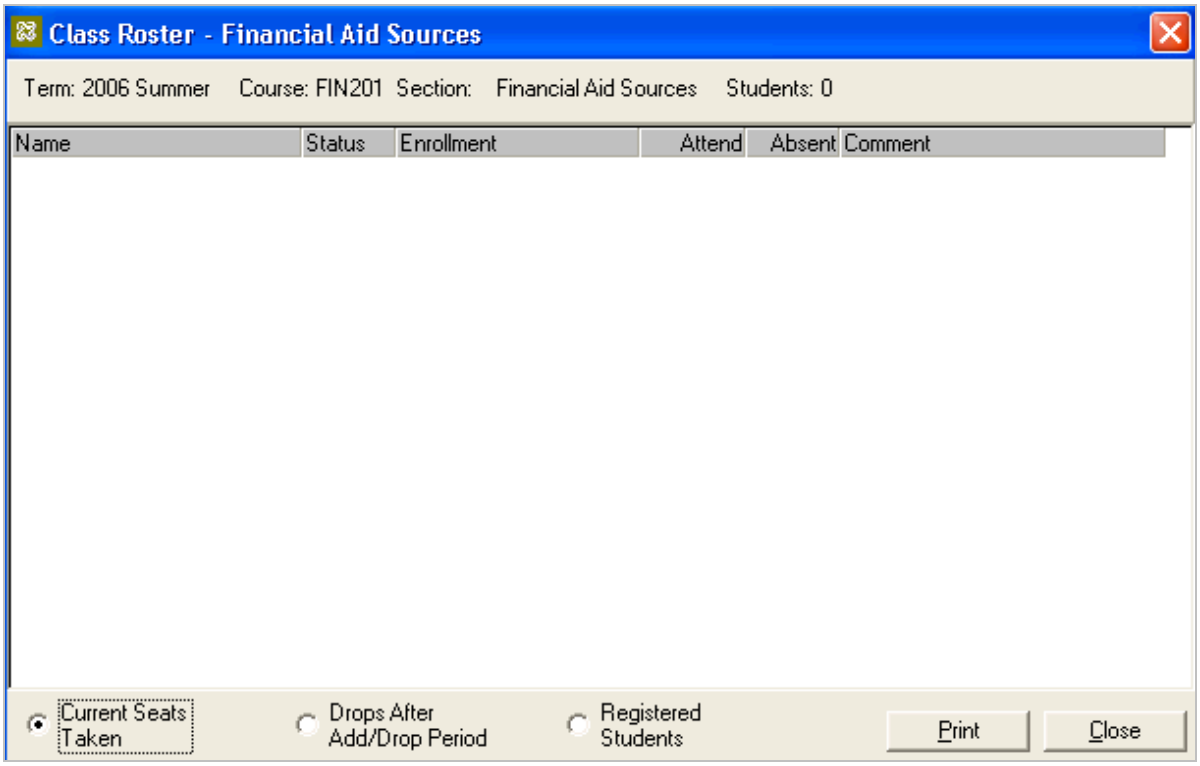
When you click the Students button on the Class Scheduling form, CampusNexus Student displays a form listing all students registered for the selected class section. The Print button on the form displays the Class Roster by Course report. CampusNexus Student displays students that are scheduled, current, LOA, dropped, or complete.

To display the roster for a class section:

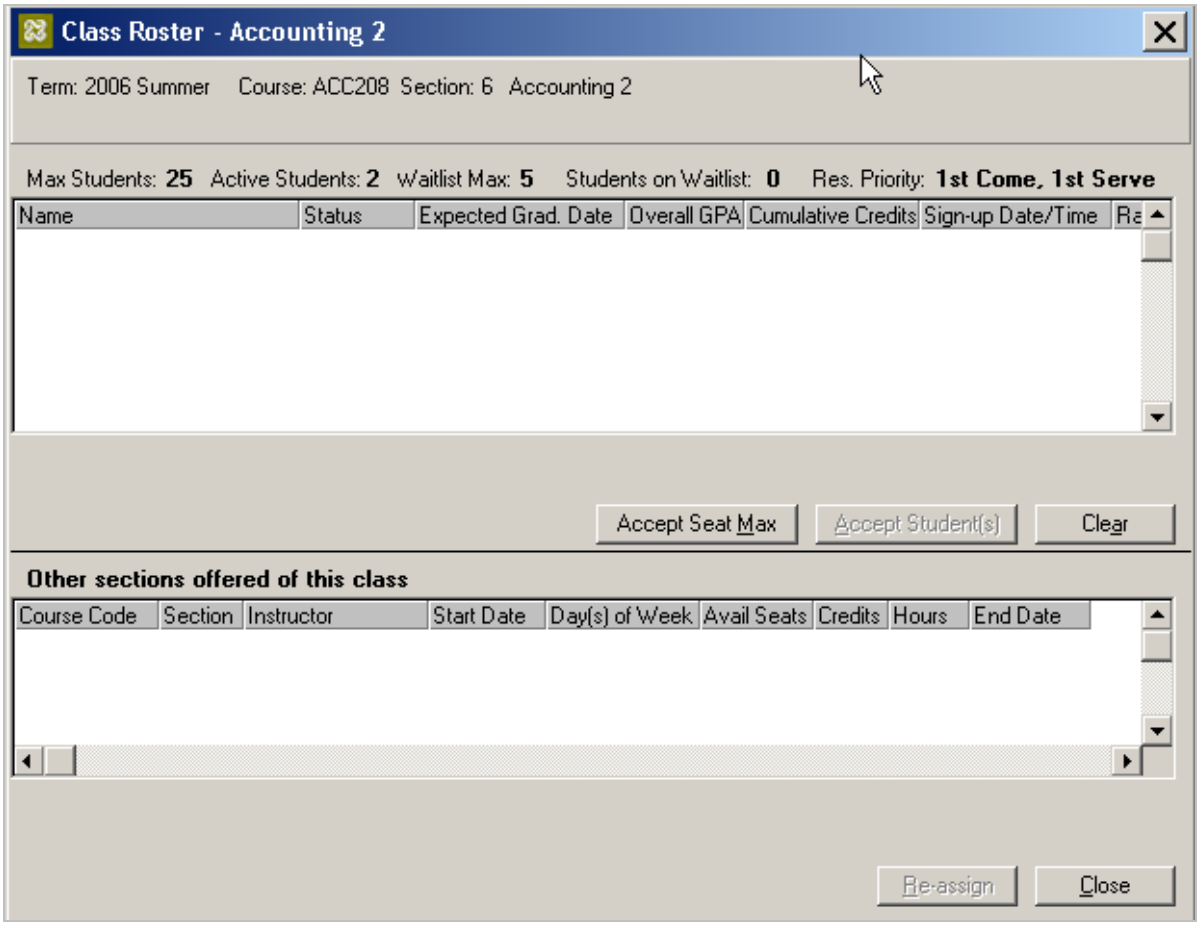
1. Navigate to **Daily > Academic Records > Schedule Classes**. The Class Scheduling form is displayed.



2. Select the **Term**, **Course**, and **Section** for which a roster must be displayed. You can select more than one class section at a time. To select a consecutive range of class sections, click on the first one, press the Shift key, and click on the last one. To select non-consecutive class sections, click the first one, press the Ctrl key, and click each one of the others.
3. Click **Students**. The Class Roster form is displayed.



4. Double-click on a **Student Name** to display the student's Student Master form.
5. Click **Print** to print the Class Roster by Course report. The students in the class section will be listed in name order.
6. Click **WaitList**. The Class Roster form for the course is displayed.



Note: If student registration lock configuration has been enabled, the Registration Locks will be evaluated when **Accept Seat Max**, **Accept Student(s)**, or **Re-assign** is clicked.

7. Click **Accept Seat Max** to accept students on the waitlist until the maximum student capacity is reached, and then register them in the class section. For example, if the maximum student capacity for this class section is 10, and 5 students are registered, this leaves 5 seats available. If there are 10 students on the waitlist, when the user clicks the Accept Seat Max button, the first 5 students on the waitlist will be registered in the class section.
8. Click **Accept Students** to select a specific student on the waitlist who needs to be registered in this class section. Clicking the Accept Student(s) button will select the student on the waitlist and register the selected student in the class section.
9. Click **Re-assign** to reassign a student to another section offered for this class. This button will be enabled if the staff member has permission to reassign the student to another section of the class.
10. Click **Close** to close the form. You are returned to the Class Scheduling form.

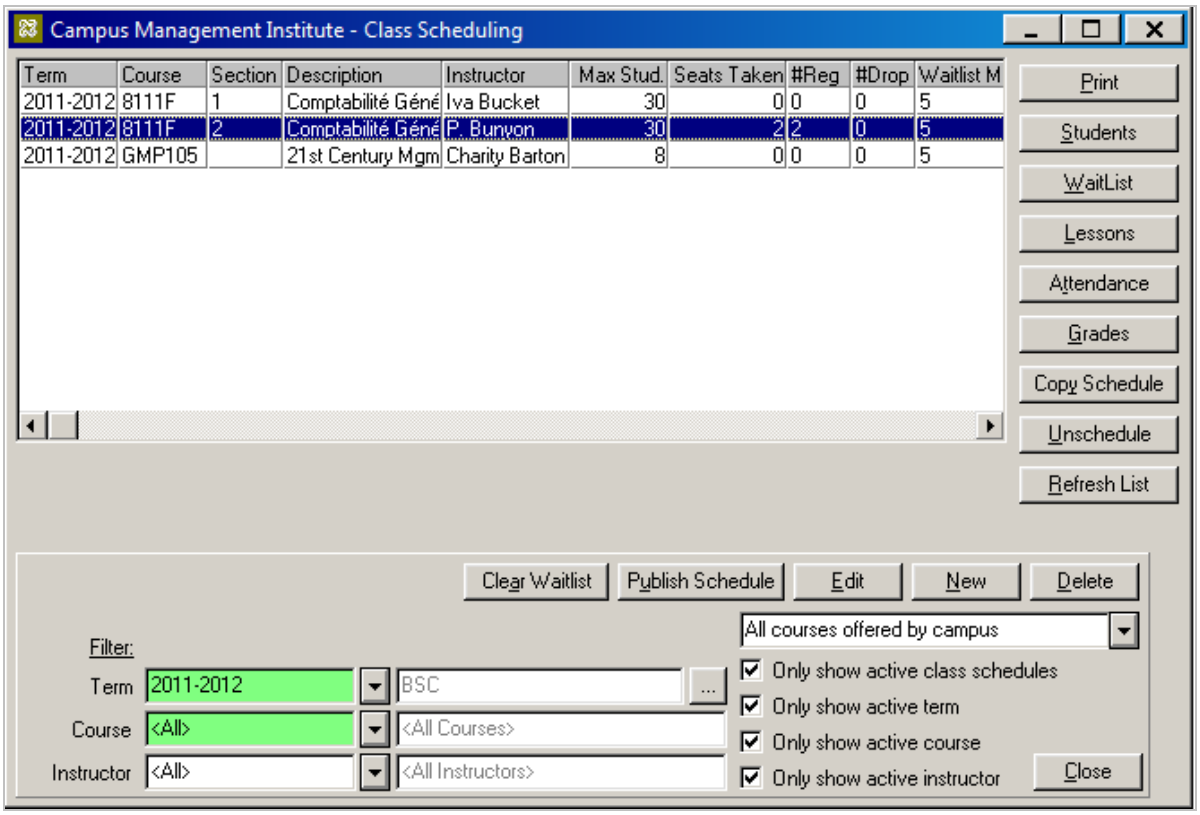
Lessons

The lessons feature of the class section definition is used to define a list of items that the student must accomplish to complete the class section. Since the lessons are defined at the class section level, different sections of the same course may have different lesson plans.

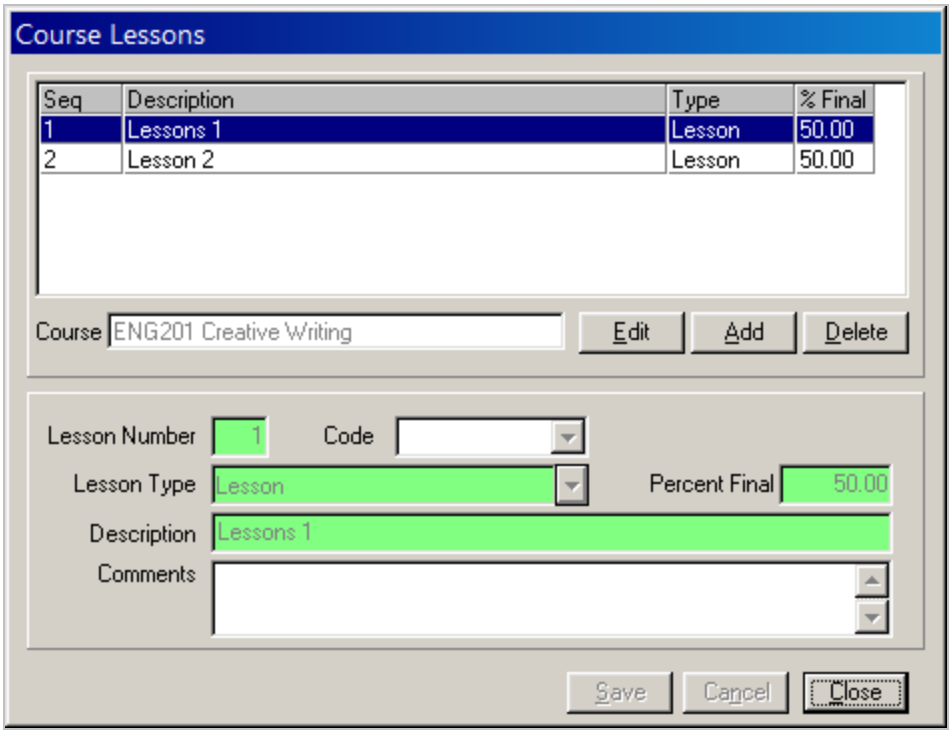
Lessons are classified by type. The default Lesson Types are: lesson, exam, or book report. To define additional lesson types for your institution, navigate to Lists > Academic Records > Lesson Types. The term "lesson" includes exams, book reports, and any other lesson types that have been defined.

To set up lessons for a class section:

1. Navigate to **Daily** > **Academic Records** > **Schedule Classes**. The Class Scheduling form is displayed.



2. Add or select the class section for which lessons are to be added or edited.
3. Click **Lessons**. The Course Lessons form is displayed. Lesson Types are available in the drop-down menu along with the Code and Description.



4. Click **Add**, or select a record and click **Edit**.
5. Enter the data that describes the lesson according to the field descriptions.

Field Descriptions

Field	Description
Lesson Grid	This is a list of the lessons for the selected class section.
Course	This is a display of the course code and description.
Lesson Number	Enter a number for the lesson. The lesson number is the sequence (order) in which the student must complete the lessons. Lessons must be received and graded in order.
Code	Enter a code for the Lesson, Exam, or Book Report. **Note**: The option to print and scan a roster to record midterm grades requires the use of form number F-15173-CMC-L. In addition, the class section must have a lesson set up with a code of MIDTERM. See "Scantron Overview".
Lesson Type	Select the lesson type for this lesson. The default options are Lesson, Exam, or Book Report. Additional lesson types may be selected if defined by your institution.
Percent Final	If you choose to assign a "weight" to this lesson, enter the value. Example: 25.00 for 25 percent of the final grade. The total of all lesson percentages must be 100%. This field retains four decimal places. For example, if enter a value in the Percent Final field such as 33.33 percent, the value is stored in the database as 0.3333. when a grade is posted to the last lesson, the program will automatically calculate and post the final grade for the course.

Field	Description
Description	Enter a description of the lesson.
Comments	Enter additional comments about the lesson.

6. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Class Section Attendance

This is an alternative location from which you can enter attendance for a class section. The other location is under Daily > Academic Records > Attendance > Record Attendance . The same form is used in both locations. Attendance can also be posted for a selected student via View (Student Bar) > Academic Records > Attendance.

Attendance is recorded "by exception". In the scenario where you are recording "Time Absent", you need enter data only for those students who were absent or tardy. The other students will automatically be posted as present.

Note: When a section change is performed by a student using the Portal or a staff member using the Portal or through CampusNexus Student, all available classes are displayed and can be properly recorded before and after the change, including classes with multiple meeting periods scheduled on the same day. Class records are available for editing and display/reporting regardless of the student attending or not attending an available course section. All eligible classes from the original section the student transferred out of remain eligible for attendance, even if attendance has already been entered for one meeting period that day.

Posting Attendance for Unscheduled Classes

You can now identify a course that meets at variable days and times. When posting attendance for such a class, you can specify which date you are posting attendance for. This will require an expected day and time to be scheduled to maintain the printing of the student schedule. This is optional. If you do not want it on the schedule, you do not have to specify days and times. A comment box (one line) has been added that can be printed next to the course on the student's schedule. This will allow a course with no days/times specified to show a comment such as "By Arrangement." The Student Schedule report has been modified to show the comments.

Dependent Course

The logic for building the class roster for which to post attendance was modified when posting attendance for a course section where the course is a "Dependent" course.

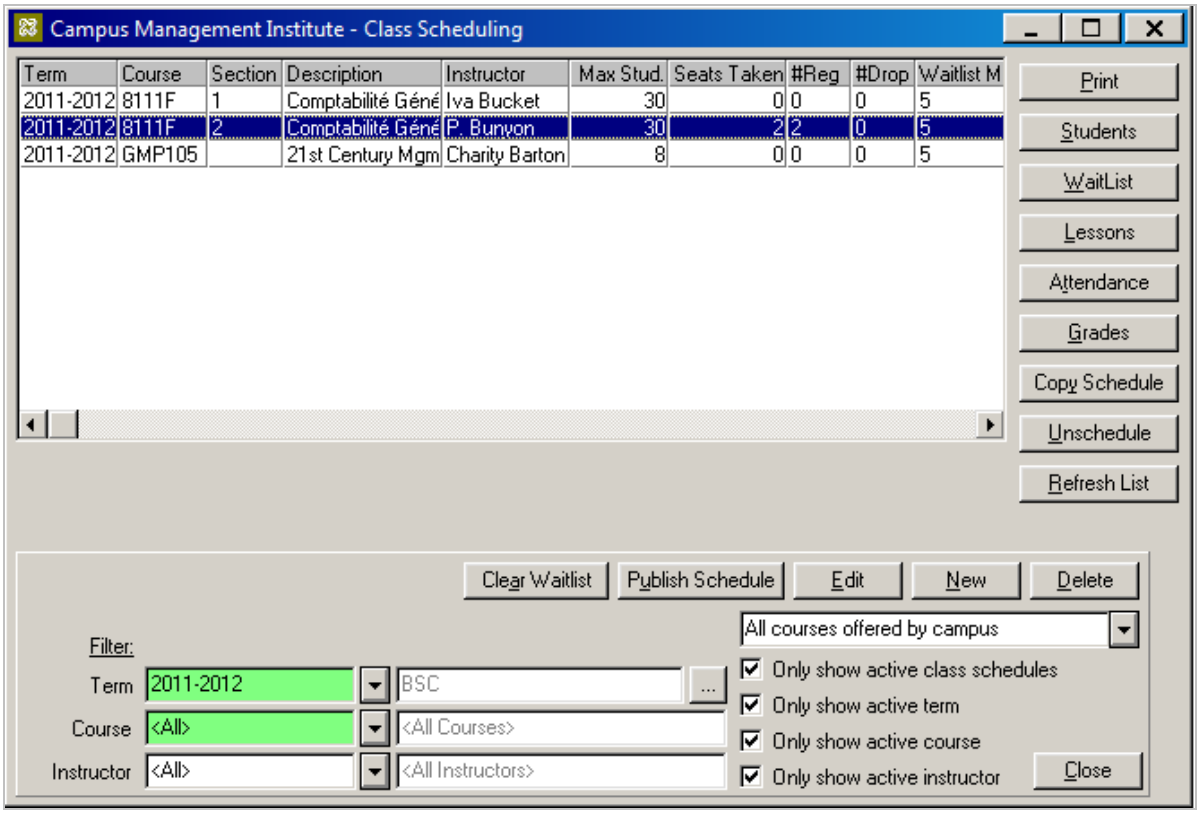
Attendance cannot be posted for dates beyond the current system date.

Attendance for a given class section can only be recorded for dates on or between the start and end dates. They are displayed beside the Instructor's name on the form. CampusNexus Student allows you to schedule more than one meeting of a class section on the same day. Each session will be represented by a different column on the grid. A total of 10 meetings may be scheduled in the same week.

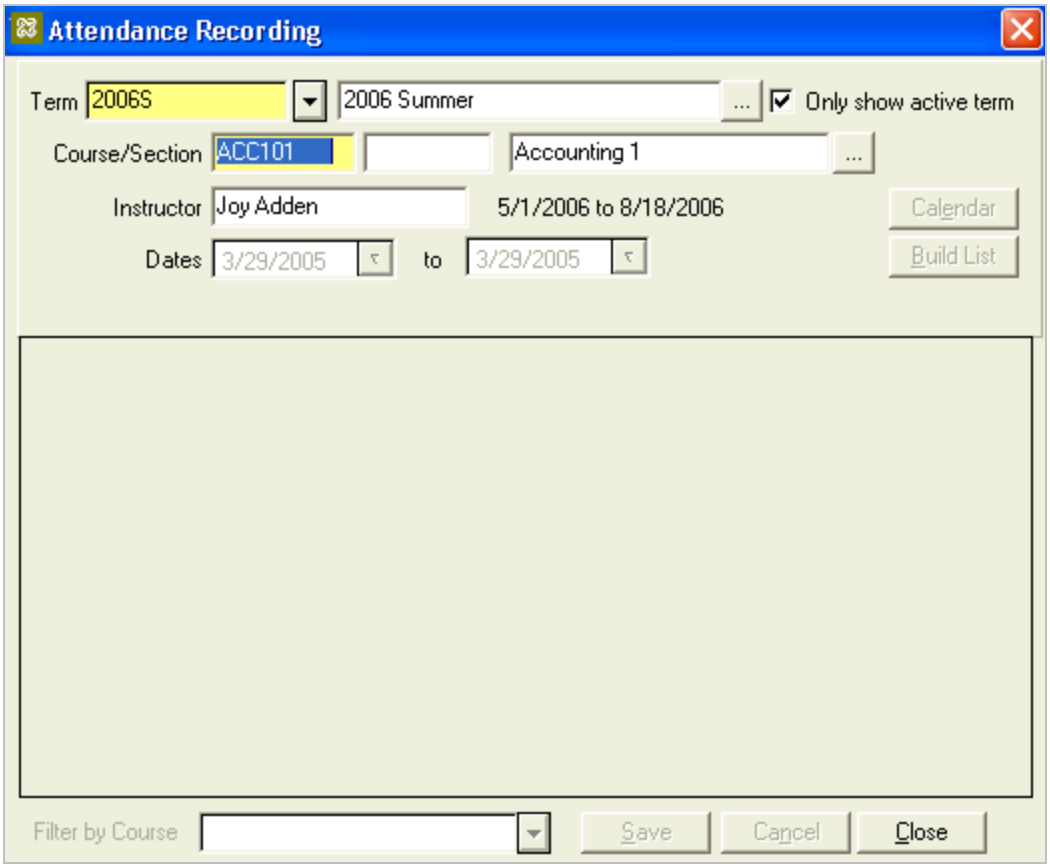
When you set up the class section, you tell CampusNexus Student how to interpret your entries. You can choose to (1) enter the time absent (in minutes), (2) enter the time present in minutes, or (3) enter a quantity of units completed by the student. A reminder of the expected entry is shown below the date range on the form. In the example, "**Enter Minutes Absent**". Note that CampusNexus Student also reminds you of the number of minutes scheduled in the lower left corner of the form (in this case, each meeting is scheduled for 60 minutes).

To enter attendance for a selected class section:

1. Navigate to **Daily** > **Academic Records** > **Schedule Classes**. The Class Scheduling form is displayed.



2. To reduce the length of the list through which you must search to find a particular class section, use the **Term**, **Course**, and **Teacher** filters.
3. Select the class section for which attendance is to be posted from the grid.
4. Click **Attendance**. The Attendance Recording form is displayed.



5. At the top of the form confirm that the correct class and section have been selected.
6. Enter the **Dates**in the date range for which attendance is to be posted. CampusNexus Student populates dates for one week after the **Last Date of Attendance**. You can change the date range to suit your need.

   CampusNexus Student remembers the date range and updates attendance for all students in the class through the end date when you save your entries. The next time you enter attendance for a class section that has been previously updated, CampusNexus Student assumes that attendance has been posted for all dates previously viewed. Students are credited with time in class up to and including the last date shown on the attendance grid.
7. Click **Build List**. CampusNexus Student displays a grid with one row for each student on the class section roster. (One extra row is displayed for technical reasons. You will not use this row.)

   Each row contains the student's status in the class and a cell for each meeting in the date range. Holidays are not displayed. (In the example, Monday, July 5, 1999, is a school holiday. The program did not display it as the default.)
8. Enter the time absent, time present, or units for each date for each student.

   If a student is absent, type an "A" (or a). CampusNexus Student converts your A to the number of minutes scheduled for the class. Alternatively, you can enter the number of minutes scheduled for the class.

   If a student has an excused absence, type an "E" (or e) to record an absence for the scheduled time of the class.

   To record a "tardy" in the "Time Absent" scenario, enter the number of minutes the student missed, e.g., if the student is 15 minutes late to class, enter 15.

If a student is present (in classes set up to record time present), type a P (or p) to record the minutes scheduled for the class. **Note that in the "time present" scenario, CampusNexus Student does not track time absent**.

To record the number of units completed by the student (such as experiments completed, welds made, and so on), enter the number.

9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. You are returned to the **Class Scheduling** form.

Attendance for Unscheduled Classes

You can identify a course that meets at variable days and times. When posting attendance for such a class, you can specify which date you are posting attendance for. This will require an expected day and time to be scheduled to maintain the printing of the student schedule. This is optional. If you do not want it on the schedule, you do not have to specify days and times. A comment box (one line) has been added that can be printed next to the course on the student's schedule. This will allow a course with no days/times specified to show a comment such as "By Arrangement." The Student Schedule report has been modified to show the comments.

The attendance-posting procedure has been modified. If the class meets at regular dates and times, the existing attendance logic will be followed. If the class does not meet at regular dates and times, CampusNexus Student will prompt you to enter the date for which attendance is being posted. The program defaults to the next date of attendance. Dates you enter must be on or after the class start date and on or before the class end date. If your entry fails to meet this test, a warning message is displayed indicating that the "Date is outside of Class start and end dates. Please re-enter date".

When you enter a date, the program checks for existing attendance records. If a record exists for this class section, date, and start time, this data will be loaded into the grid for editing. A message states, "Attendance already on file for entered class and date, enter new attendance hours? If you answer yes, the program will load the grid to add new attendance for the day and start time. If you answer no, the program will load existing data from the attendance table.

You will also be prompted to enter the time the class met and the length of the class. The program defaults to the start time from the schedule table.

When you click the "Build List" button, the students are gathered using the previous routine, but the program defaults the length in minutes to the value you entered. This procedure allows posting for only one date at a time, so the grid will display only the date specified.

When you save your entries, CampusNexus Student updates the next day of attendance based on the class schedule. If there is no record in the class schedule table for this course, the program defaults to the next calendar weekday.

Grades

You can use this form to post final grades for a selected class section. This is an alternative location for accessing this form. See also academic progress.

To post final grades for a class section from this menu option:

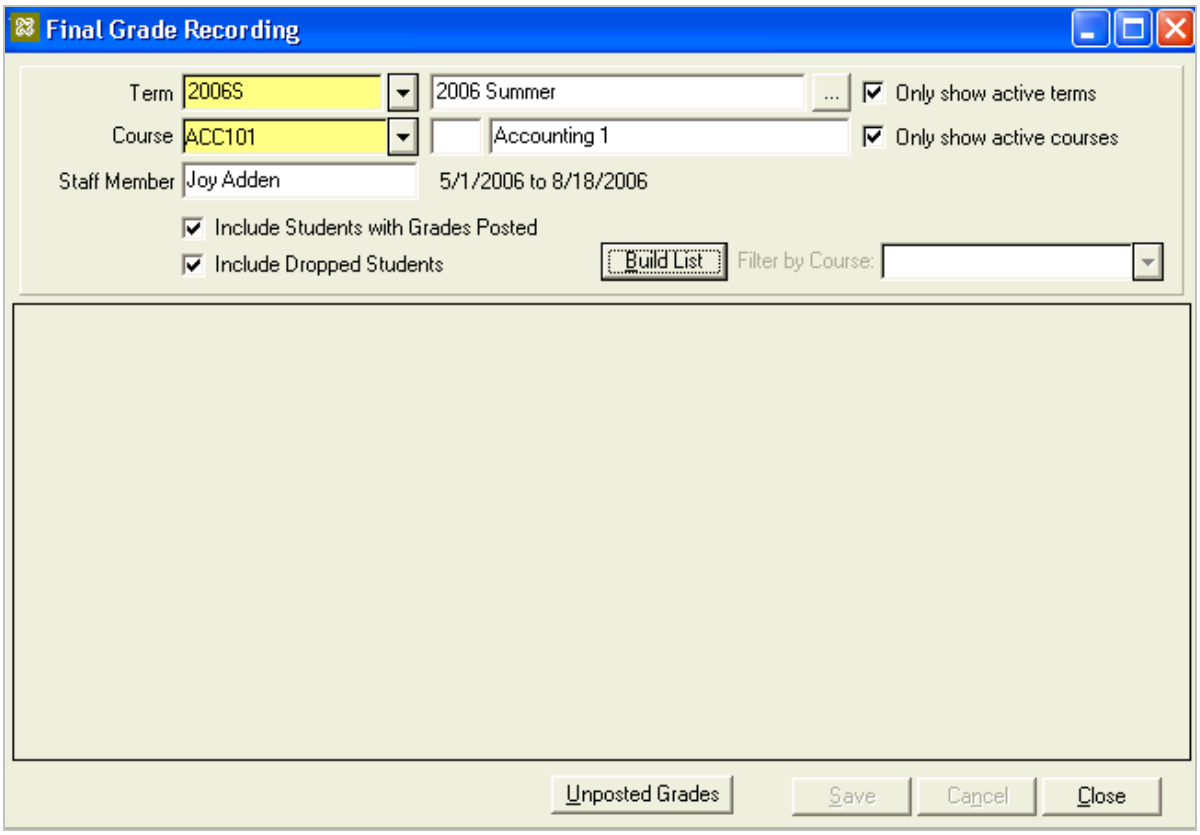
1. Navigate to **Daily > Academic Records > Schedule Classes**. The Schedule Classes form is displayed. Select a course and click **Grades**.

   - OR -

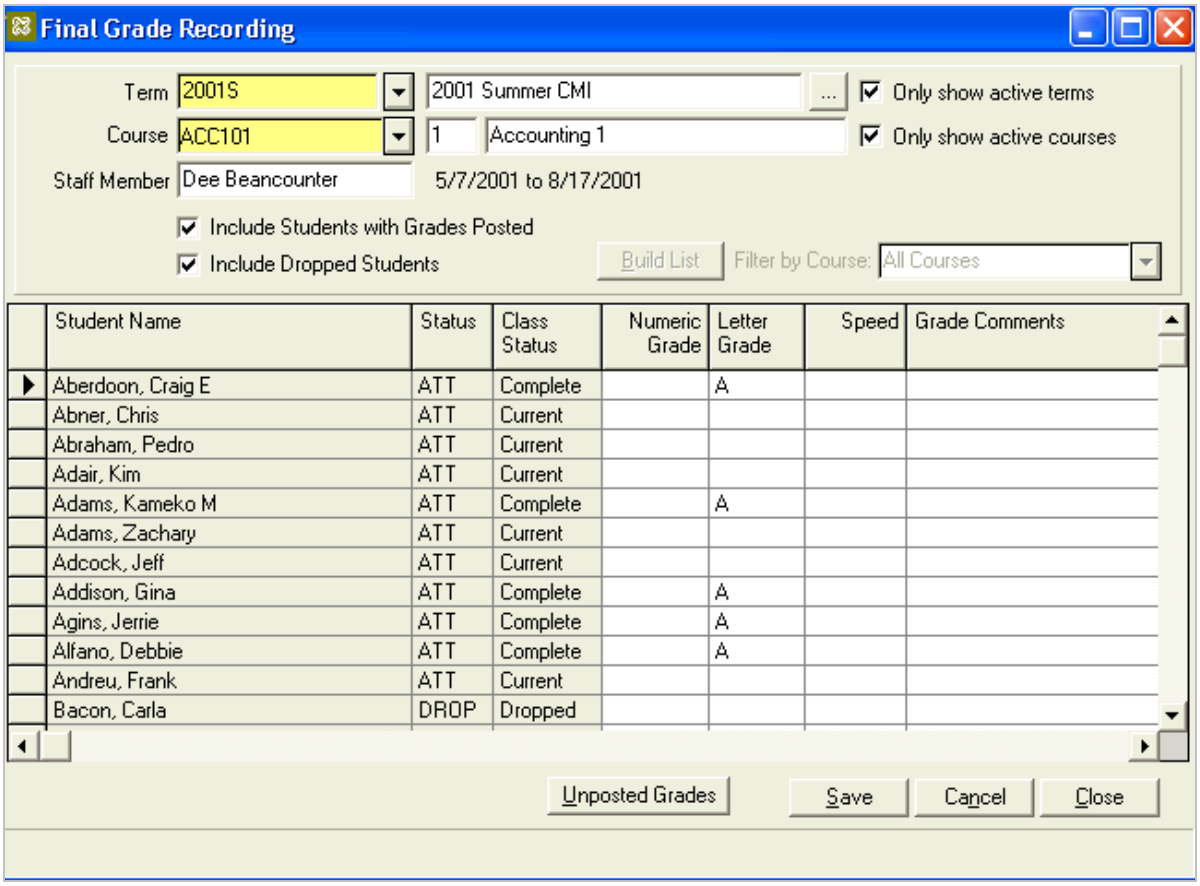
   Daily > Academic Records > Final Grades.

   The Final Grade Recording form is displayed.

2. Select the **Term** for which grades are to be posted. The term description is displayed.



3. Select the **Class Section** for which grades are to be posted. The class section description, instructor's name, and beginning and ending dates are displayed.
4. To include students whose final grade have already been posted, select **Include Students with Grades Posted**. The default is to show all students. Otherwise, leave the check box blank to see only students who have not had grades posted.
5. Click **Build List**. CampusNexus Student builds a grid using the class roster. The grid shows the Student Name, Numeric Grade, Letter Grade, Speed, and Grade Comments.



Field Descriptions

Field	Description
Student Name	The list of students depends on your choice to list all students or only those that do not have grades posted.
Numeric Grade	The numeric grade given to the student whose name is displayed on the row. If your institution does not record numeric grades, leave this cell blank.
Letter Grade	The letter grade given to the student whose name is displayed on the row. A numeric grade was entered is converted to a letter grade according to the grading scale associated with the student's program version. If numeric grades are not used, select a grade from the list that is displayed when you enter the letter grade cell. Otherwise, type the student's grade in the cell. Grades you type in the cells are validated in the program version grading scale that applies to the student. **Note**: Since grades depend on the grading scale associated with the student's program version, it is possible that two students with the same numeric grade receive a different letter grade if a different grade scale was chosen at the time of enrollment.
Speed	This field is used to record such data as typing speed or other "rating" values. It is a numeric field in which you can record anything you like.

Field	Description
Grade Comments	Use this cell to record instructor comments or other information regarding a student's grade. **These comments will be printed on the student's transcript.** **Note**: When assigning final grades to the students, you cannot edit the details of student who has taken the selected course as Audit.
DateGradePosted	This field is included with Final Grades for students. This date is the system date that the grade letter was recorded in CampusNexus Student. This date is used to produce daily grade reports.

6. Enter the **Numeric Grade** or **Letter Grade** for each student on the roster. It is not necessary to enter grades for all students in the same session. You can close the grading form and come back at a later date with more grades or with changes. If you do not enter numeric grades, you can select the letter grade from the list box that is displayed when the insertion point is in a letter grade cell.
7. Enter **Speed** if this value is appropriate for the class.
8. Enter **Grade Comments** as needed. **These comments will be printed on the student's transcript.**
9. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Copy Section

CampusNexus Student provides a means of copying the parameters of one class section to another. With a similar procedure, you can copy an entire term's class schedule to another term. Once you have completed either of the copy routines, you can access the new class section or new term schedule and modify it. Be sure to check the new dates, instructors, and room assignments.

In CampusNexus Student there is another location where you can also perform these copy procedures. Please refer to Daily > Academic Records > Copy Class Schedule for instructions on copying class schedules for an entire term.

Note: This procedure is used to copy a class section within a term. To copy class sections into another term, use the copy term procedure. CampusNexus Student does not copy any information about students in the class section you choose as the source class section for the copy.

Note: It is not possible to copy class schedules when using floating terms.

To copy a class section:

1. Navigate to **Daily** > **Academic Records** > **Schedule Classes**. The Class Scheduling form is displayed.
2. Click **Copy Schedule** and follow the steps described in the Copy Class Schedule procedure.

Unschedule Classes

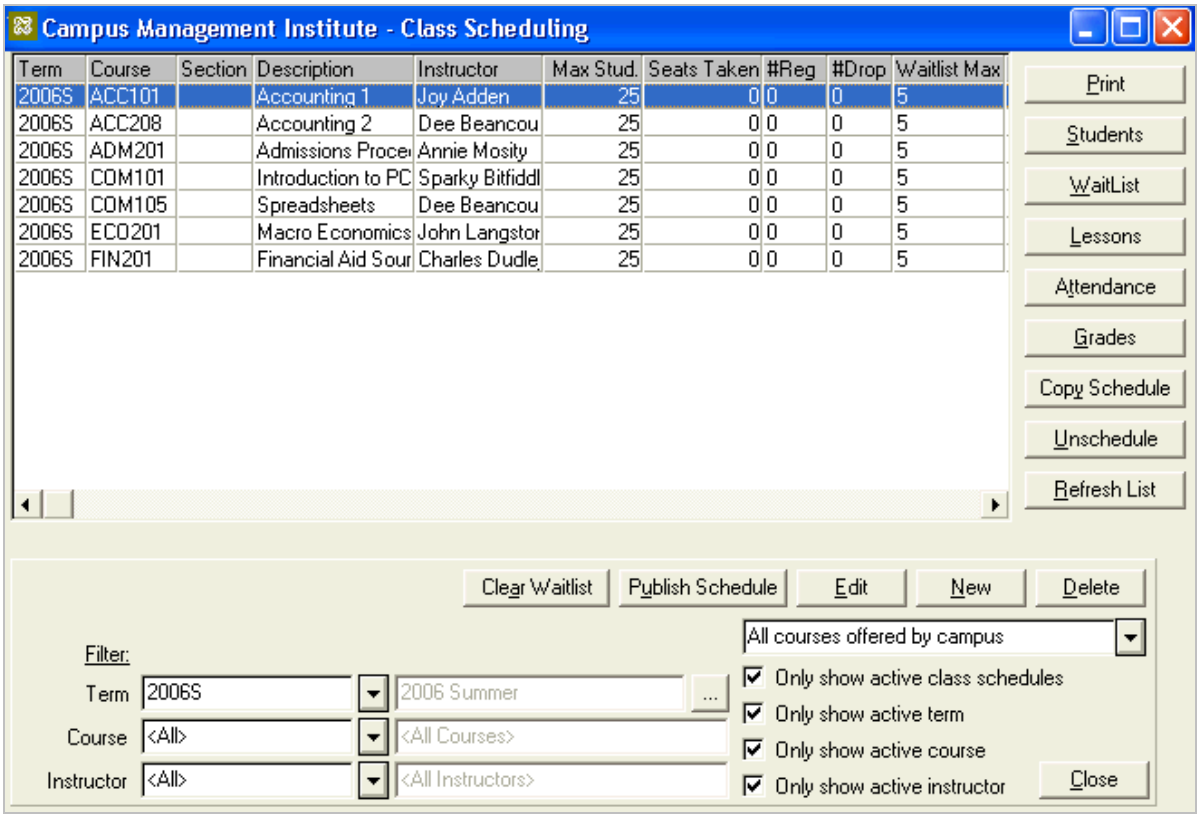
The Unschedule procedure is used to cancel selected class sections for a given date. This feature is used to cover the unexpected circumstances such as snow days, hurricanes, earthquakes, and so on that keep classes from meeting as previously scheduled. By using this procedure, you are excusing students from the selected class sections on the selected date. Attendance is treated as if the day was a Saturday or Sunday when classes are not in session.

Rather than simply treating the date as if all classes are called off, you can select the affected class sections because some sessions may be completed as scheduled on the selected date.

To unschedule selected class sections for a given date:

1. Navigate **Daily** > **Academic Records** > **Class Scheduling**. The Class Scheduling form is displayed.
2. Use the **Filter** options to narrow the list of class sections to be considered. In particular, select the affected **Term**.
3. Within the affected term, **select the class sections** to be cancelled.

   You can select a group of adjacent class sections on the list by clicking the first class in the group then, while holding down the **Shift key**, click the last class in the group. You can select multiple non-adjacent class sections on the list by holding down the **Ctrl key** while clicking the class sections on the list.
4. Click **Unschedule**. The Class Unschedule Date form is displayed.



5. Enter the **Date** for which classes are cancelled.
6. Click **Save** to unschedule the class section(s). If any of the selected class sections are not scheduled to meet on the selected date, you will see a message indicating that. Other selected classes are not affected by the message.

Dependent and Parent Courses

If a course is dependent, it will require a "parent" course code to be defined. The dependent course is a course (such as a lab) where students on the roster are linked to a parent course. This allows "child " rosters to be created from the parent roster. A common application of this is a lecture roster, which might hold 80 students. The lab portion of the lecture course meets at four different times with each lab roster being comprised of 20 students each. All attendance posted for the dependent course is included in the total hours of the parent course. The main benefit of this feature is that a school now can create multiple sub-rosters from a main parent roster without losing the ability to track hours attended and scheduled for the parent course.

Lists > Administration > Courses

You can indicate that a course is a "parent" or "dependent" course.

- If a course is defined as "dependent", you can select one or more courses that will be the course's "parent". A "dependent" course can have more than one "parent" course.
- If a course is defined as "dependent", the hours and credits fields will be disabled. These fields are not applicable for "dependent" courses.
- A parent course can have only one course designated as "dependent".

When the check box "Dependent Course" is selected, the course will be tagged as a "Dependent" course. If the box is cleared, the course will be tagged as a "Parent" course. When adding a new course, the default choice for this field is cleared.

If the dependent course check box is selected, the Credits and Hours fields are disabled. These fields are not applicable for a dependent course.

A button has been added to the left of the Fees button. If the dependent course check box is selected, the label for the button label will be "Parents".

When the button is clicked, a new form is displayed. The form will consist of two buttons and two list boxes.

There will be no tabs on the top of the form. The heading for the list box on the left is "Available Courses". If the "Dependent Course" check box is selected, the heading for the list box on the right is "Selected Parent Courses".

If the "Dependent Course" check box is selected, the "Available Courses" list box will be populated with all active "Parent" courses. The course code and description will display for each row presented in the "Available Courses" list box. Multiple parent courses may be specified for a dependent course.

Lists > Academic Records > Programs > Versions > Required Course List

The drop-down list of courses has been modified to exclude "Dependent" courses.

Daily > Academic Records > Registration

Note: For those schools that use track registration, students can only be registered in "Parent" courses. You can only register students in "Dependent" courses using term registration.

If you are registering students for a course defined as "Dependent", the criteria to display the available students on the registration form are modified. If the course selected in the opening form is defined as "Dependent", the available students selected for the list box will be all students who are currently registered for any course defined as the parent of the dependent course in the selected term.

A button has been added to the registration form to list the students already registered in the selected course section.

Two fields, "Max Students" and "# (Number) Registered", have been added at the top of the form to list the number of students currently registered for the course and the maximum number of students allowed to be registered for the course section. The number of students registered field will be redisplayed as students are selected for and deselected from the course section.

Before loading the registration form, the course section selected is evaluated to see if the course is defined as a "Dependent" course or a "Parent" course. If the course is a "Parent" course, the logic for populating the Students Available list box will remain the same. If the course is a "Dependent" course, the Students Available list box will be populated with students who are currently scheduled for any "Parent" course in the selected term.

A "Registered Students" button has been added on the bottom of the form. When you click this button, a form will be presented that lists the students who are already registered in the selected course section.

Daily > Academic Records > Attendance > Record Attendance Dates

An alert message has been added to the Record Attendance Dates form that will warn you if no course sections exist in the selected term that are set up with an Attendance Type of "None". When a term is selected from the drop-down list, the course drop-down list is built by selecting all rows from the class schedule where the attendance type is "None" for the selected term. If no rows are selected, an alert message is displayed as follows:

"There are no course sections on file for the selected term where the attendance type is None." Click OK. Upon exiting the alert message form, CampusNexus Student closes the form.

Logic has been added so that course sections where the course is defined as "Dependent" will be omitted from the course section drop-down list on this form.

If the "Parent" course is set up with an Attendance Type of "None", the last date of attendance will be tracked for that course only. A separate last date of attendance for the "Dependent" course will not be tracked.

View > Academic Records > Schedule

When you click Register on the Schedule form, an alert message will warn you if the selected course is not currently scheduled for any term. Previously, the subsequent Add Course form was loaded, but the term drop-down list was empty. The following alert message is displayed if the highlighted course is not scheduled for any terms. "The selected course is not currently scheduled for any terms." Click OK. The program returns to the Schedule form.

Daily > Academic Records > Schedule Classes

Logic has been added to the "Delete" button on the Schedule form to prevent a course section from being deleted from a term if it is a "Parent" course, has a course defined as it's "Dependent", and the "Dependent" course has at least one section scheduled for the selected term. A message is displayed: "This course section has a dependent course scheduled for the term. This course section cannot be deleted." Click OK.

Logic has been added to the "New" button on the Schedule form to prevent a course section from being scheduled for a term if it is a "Dependent" course and the defined "Parent" course has not been scheduled for the selected term. A message is displayed: "There are no parent courses currently scheduled for the term for this course. This course section cannot be added to the term class schedule until at least 1 parent course has been scheduled." Click OK.

Daily > Academic Records > Attendance > Rosters

Logic has been added to the printing of class rosters to properly select students when printing a roster for a course section where the course is defined as "dependent".

Daily > Academic Records > Schedule Classes > Attendance
Daily > Academic Records > Attendance > Record Attendance

The logic for building the class roster for which to post attendance has been modified when posting attendance for a course section where the course is a "Dependent" course.

View > Academic Records > Schedule > Print > Schedule
Reports > Academic Records > Student Schedule

The logic for the Student Schedule report has been modified to include "Dependent" course sections scheduled for a student.

Reports > Academic Records > Posted/Unposted Attendance

Logic has been added to this report to exclude course sections where the course is defined as a dependent course.

Reports > Academic Records > Detail Attendance

A comment field will be added to this report. If a detailed attendance record is for a "Dependent" course, the "Dependent" course description is updated to the comment field in the attendance table. The course description will be listed in the new column.

Reports > Academic Records > Class Roster by Course

The logic for listing the class roster has been modified to list the correct set of students when a class roster is for a course that is defined as "Dependent".

Reports > Academic Records > Class Roster by Instructor

The logic for listing the class roster has been modified to list the correct set of students when a class roster is for a course that is defined as "Dependent".

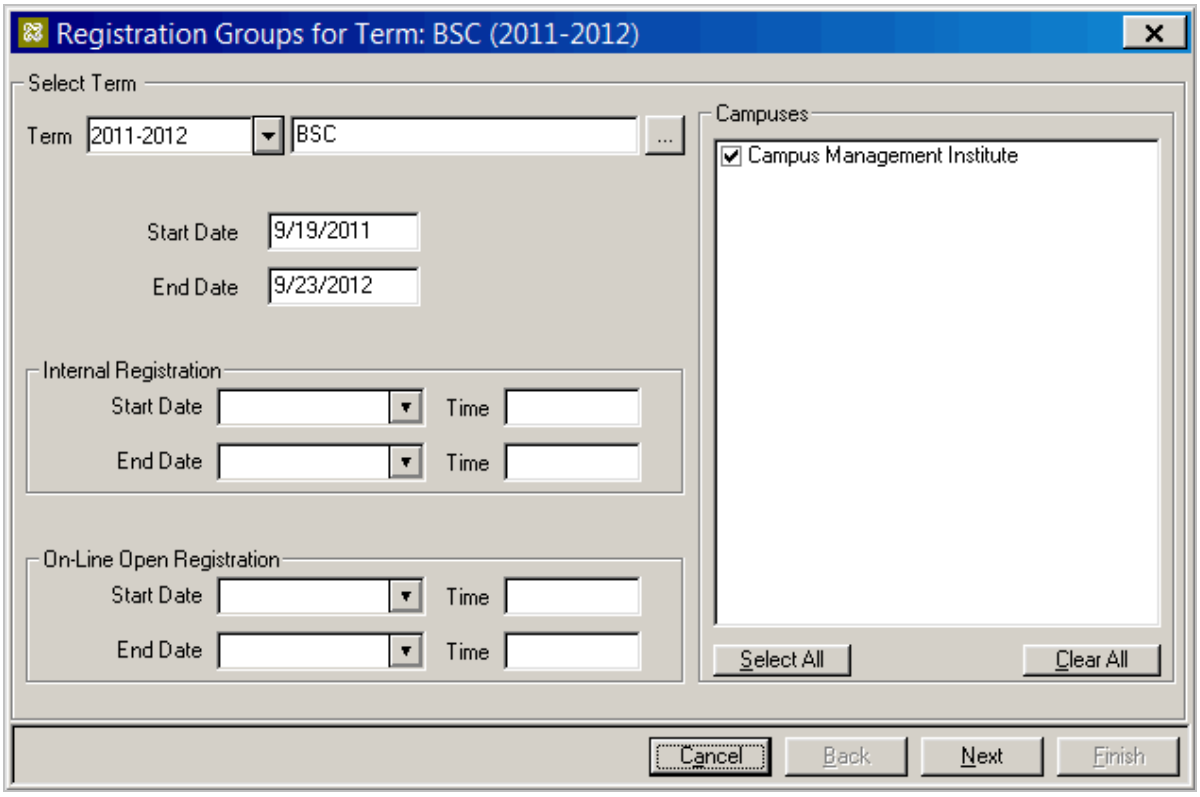
Define Term Registration Groups

The Term Registration Groups feature allows you to define groups of students for registration. This can be useful to divide the number of students to register for a term into three groups of students with last names beginning A through H, I through P, and Q through Z. By setting different term registration dates for these groups, you can avoid having all students trying to register at the same time and better control the numbers. You can also define a registration group of all students assigned to a particular Admissions Representative.

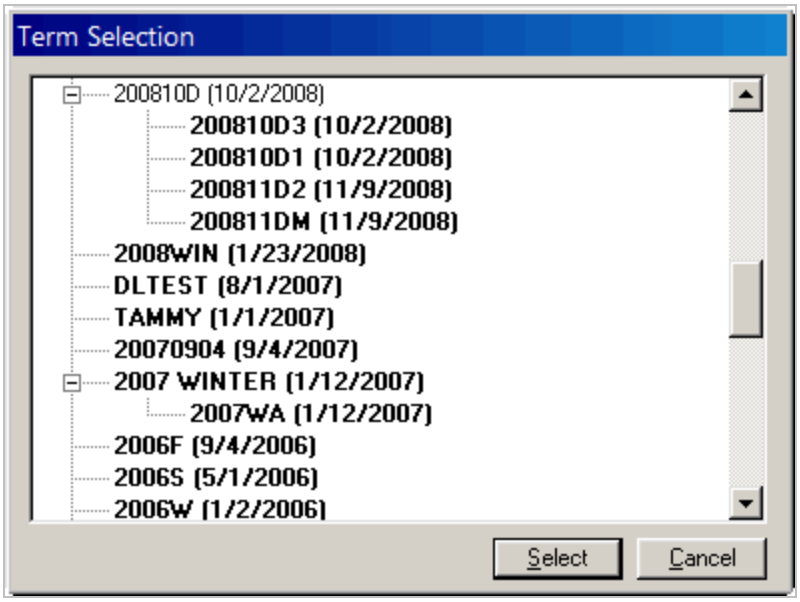
Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

To define a term registration group:

1. Navigate to **Daily > Academic Records > Define Term Registration Groups**. The first step of the Registration Groups for Term wizard is displayed.

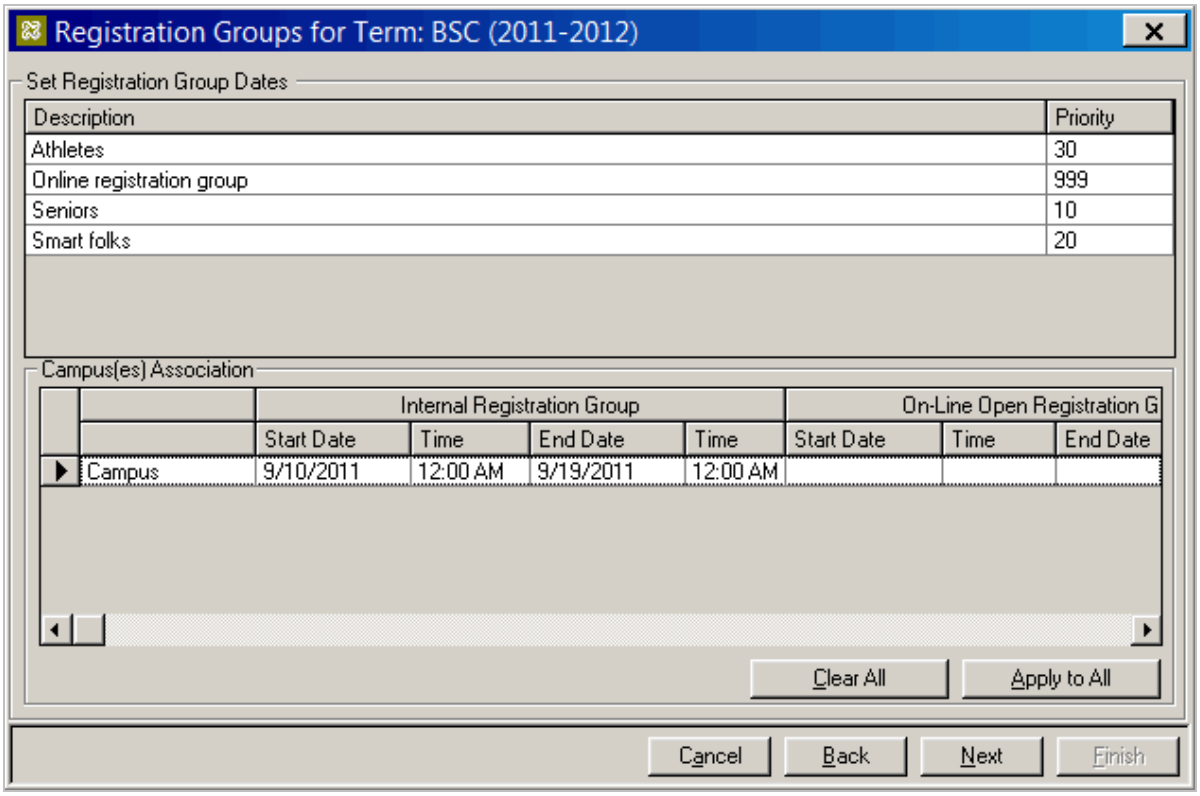


2. Select the term code in the **Term** field drop-down. You can also click ... to the right of the **Term** field to view the Term Selection form for term selection.



3. Once you have selected a term, their associated campuses appear in the **Campuses** list and the Term is displayed in the header of the form. Select all applicable campuses that are associated with the Registration Group for the term selected.
4. Specify the dates and times for the start and end of the registration periods for the selected term in the **Start Date** and **End Date** fields. You can do this for **Internal Registration** and **On-Line Open Registration** periods.
5. Click **Next**. You can prioritize the *display* of registration groups, using numeric values from 0 through 999. If you are dividing students into three groups based on first initial of their last name, for instance, you could have any one of the three groups displayed first, instead of always the A through H group.

   Note: The priority of registration (i.e., dates when a Registration Group can register) is determined based on the Start and End Dates entered for each group. The Priority field on this form does not affect the dates when a Registration Group is permitted to register.



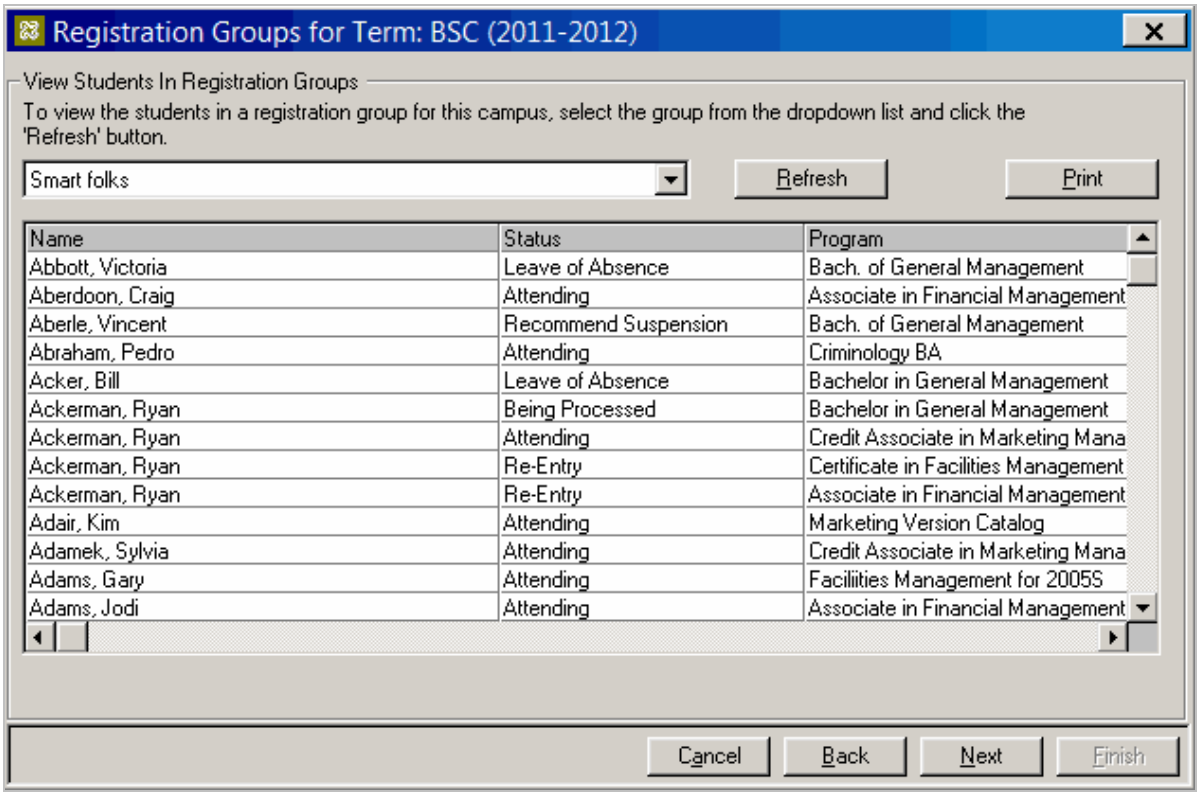
6. When a group is selected, campuses associated with the Registration Group selected are displayed in the lower portion of the form where registration dates may be entered. The start and end dates for the registration periods must occur on or before the term start date.

   Specify the desired dates for the first campus listed and click **Apply to All** to implement the registration dates for all campus terms listed below the first campus.

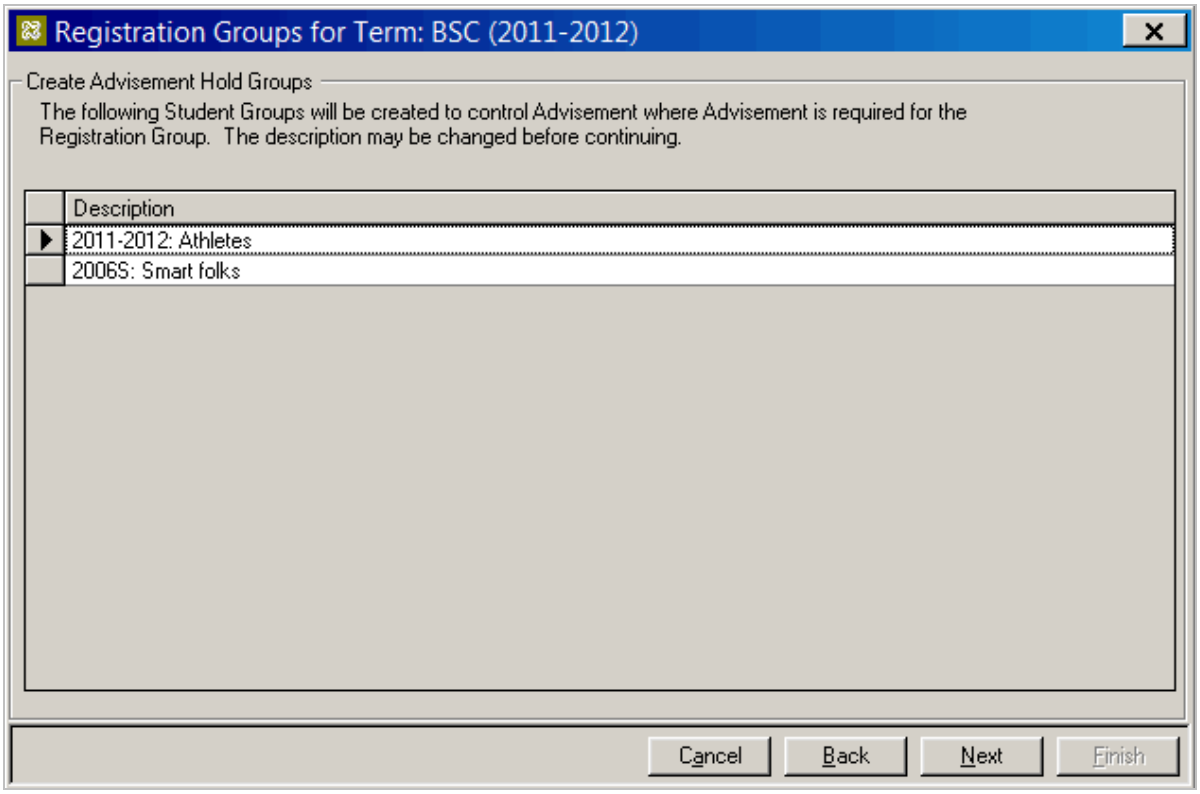
   CampusNexus Student displays a message stating "Selected registration date configuration will be applied to all the campuses whose date column(s) is blank".

   If no dates are entered for a Registration Group, the members of that Registration Group will be assigned the start and end dates specified on the first page of the Registration Groups for Term wizard.

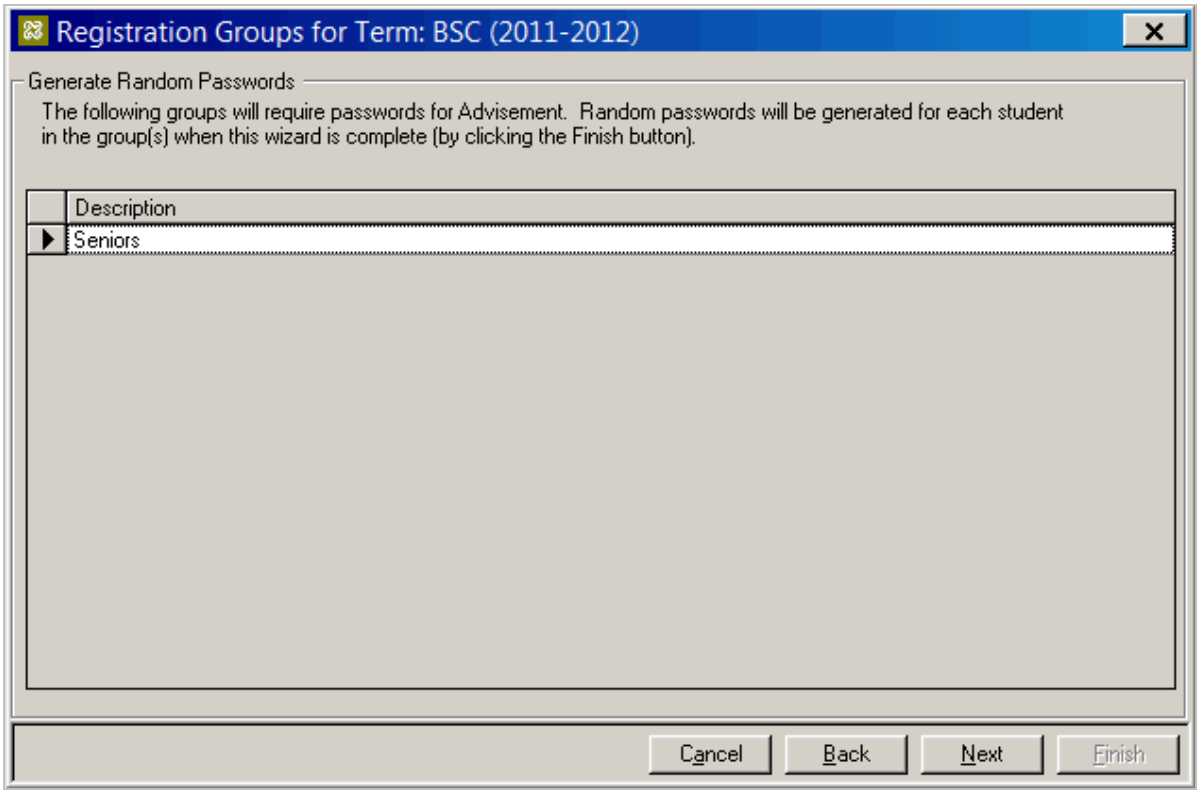
7. Click **Next**. Select a Registration Group and click **Refresh** to view all the students who are members of the group.



8. Click **Next**. If any Registration Groups have the Advisement option enabled, this form displays Registration Groups that will be on hold until the required advisement is conducted.

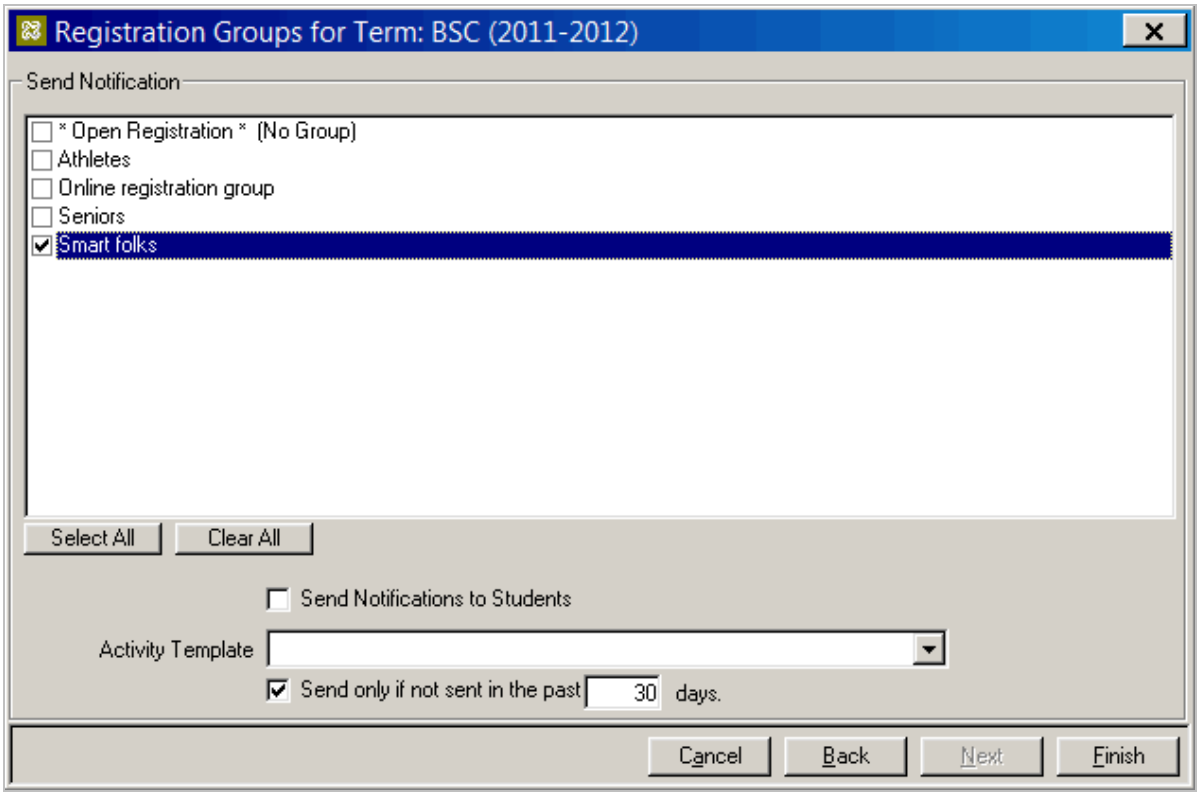


9. Click **Next** to view the **Generate Random Passwords** form. If any Registration Groups have the Password option enabled, this form displays the Registration Groups that require passwords for advisement.



10. Click **Next** to view the **Send Notification** form. Each Registration Group can have notification enabled or disabled by checking the box next to the group name. Select the activity used to notify the students from the **Activity Template** drop-down list.

    Select **Send only if not sent in the past** and specify the number of days.



11. Click **Finish** to save your changes and close the wizard.

Setup Registration Tracks

This form is used for setting up an entire track of courses to be used for registration. The track will include the class sections that a student will be taking and the order in which the student will take them. A school can setup a different registration track for each start date for a program.

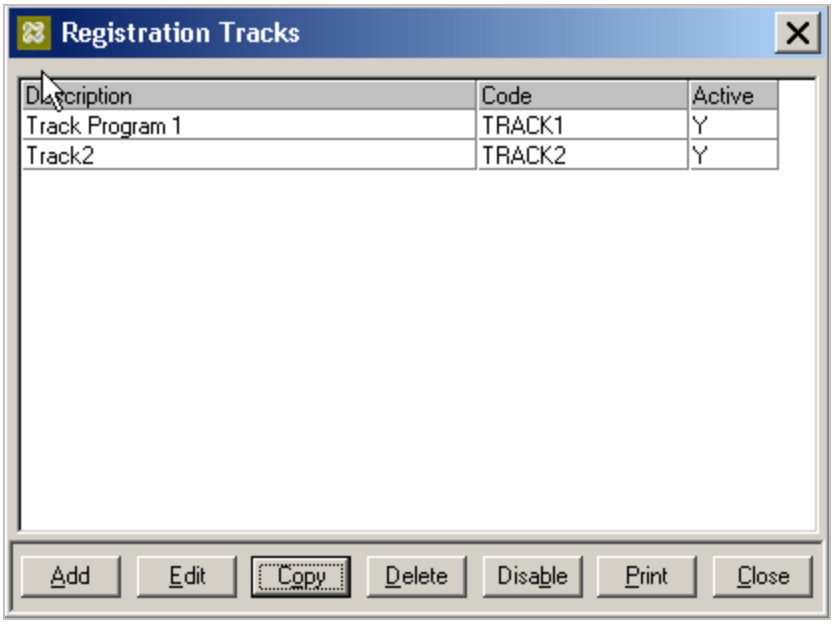
It is recommended that you plan and set up the entire track progression (in other words, all required courses, terms, and class sections) prior to setting up your Registration Track. While it is possible to start with a partial set of track parameters, it is more difficult to come back at a later date and add additional courses, terms and class sections. It will require a re-registration of the students in the track.

The setup form includes a code and description along with the class sections that belong to the track. The combo boxes for Terms and Program are used to add scheduled classes to the grid. When one or more terms are selected, all class schedules for the terms selected will be added to the grid (courses must be defined in **Daily** > **Academic Records** > **Schedule Classes**). When a combination of program and terms are selected, only the courses that are specified for the program and are scheduled in the terms selected will be added to the grid. After the grid has been filled with the selected courses, you select each class section to be used for the registration track. After saving the track, only the courses that were selected are displayed. More courses can be added by selecting more term(s) to add and then selecting the class sections to add.

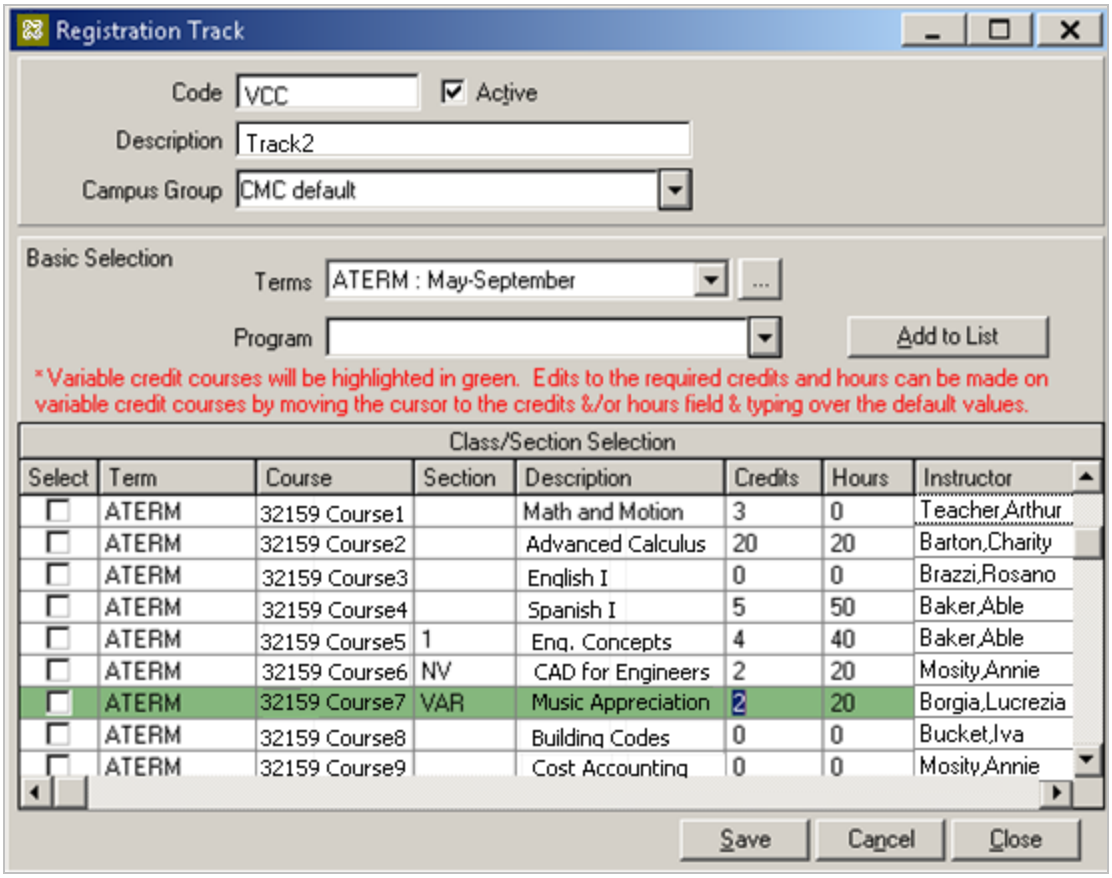
Options have been added to the registration form (Daily > Academic Records > Registration) for TERM or TRACK registration. The Term Registration works the same as in previous versions. Track registration will allow you to register student(s) into a predefined track of classes. When using the track registration, you will select the track to be used for registration. The track registration method will register only those students that have the course on their class schedule with a status of Future or Scheduled. If a student does not have the course as Future or Scheduled, they will not be registered into the class section defined in the track.

To work with a registration track:

1. Navigate to **Daily > Academic Records > Setup Registration Tracks**. CampusNexus Student displays a list of registration tracks.



2. Click **Add** to create a new track, or select a listed track and click **Edit** to see the detail form. CampusNexus Student displays the Registration Track form.



3. Specify a unique **Code**.
4. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
5. Enter a **Description**.
6. Select a **Campus Group** that will use the registration track.
7. Select one or more **Terms** that will be included in the registration track. The list boxes for Terms and Program are used to add scheduled classes to the **Class/Section Selection** grid.
8. Select a **Term** and **Program** from which courses will be added to the **Class/Section Selection** grid.
9. Click **Add to List**. CampusNexus Student adds all the class sections required by the program in all the selected terms to the **Class/Section Selection** grid. (If the same course is offered in multiple sections in multiple terms, you will see it listed several times on the grid at this point.)
10. To form your registration track, select the courses to be taken by the track students in each term. Keep in mind the need to coordinate your selections so that prerequisite courses are taken in earlier terms. Also keep in mind the total credits or clock hours being selected in each term.
11. If one or more of the courses you have selected are variable credit courses, they will be highlighted in green. The required **Credits** and **Hours** may be edited by moving the cursor to the desired field and typing over the default value.
12. Click **Save** to save the class sections you selected for your registration track.
13. After saving the track, only the courses that were selected are displayed in the grid. More courses can be added to

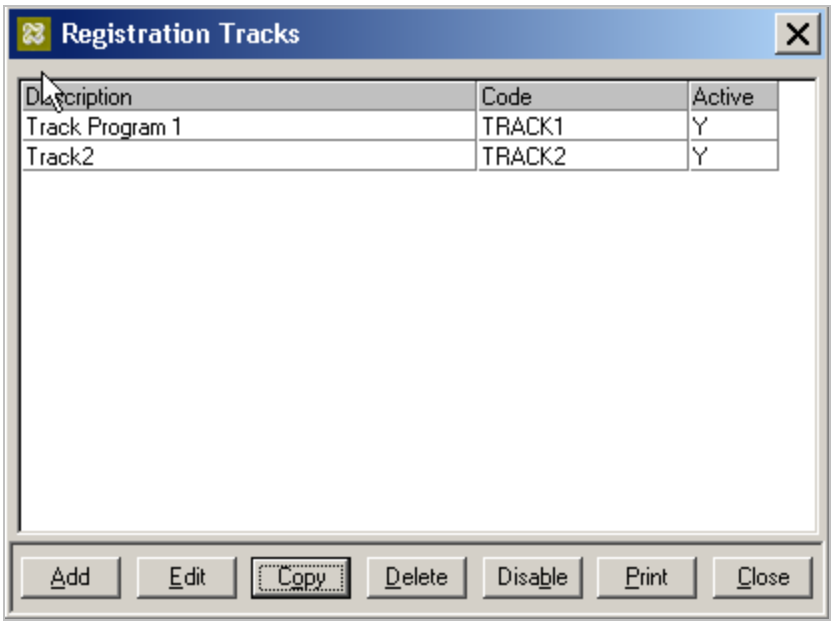
the grid by selecting the program and/or term(s) to add and then selecting the class sections to add. (It is best to make any additions to the registration track before registering students in it.)

14. Click **Close** to close the form.

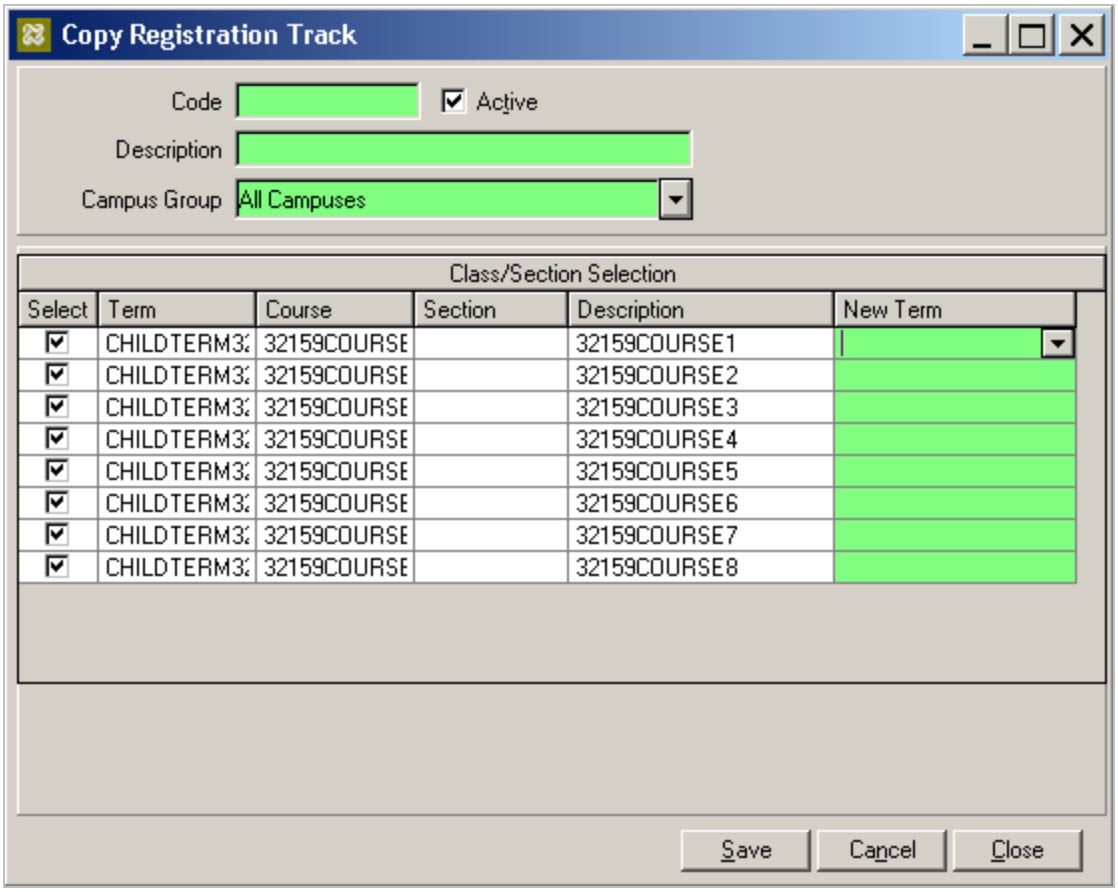
After you have set up your Registration Track, you are ready to register students. Go to the Daily > Academic Records > Registration menu option. On the first page of the registration wizard, click the **Track Registration** option.

To copy a registration track:

1. Navigate to **Daily** > **Academic Records** > **Setup Registration Tracks**. CampusNexus Student displays a list of registration tracks.



2. Highlight the registration track row that you want to copy and click **Copy**. CampusNexus Student displays the Copy Registration Track form.



3. Specify a unique **Code**.
4. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
5. Enter a **Description**.
6. Select a **Campus Group** that will use the registration track.
7. The **Term** column is the term of the original course in the track. The **New Term** column drop-down list displays a list of terms that are available for the course in the track to be copied to. Select a term that will be included in the newly copied registration track.

   Note: Terms are displayed in the **New Term** column if the Course and Section is an exact match of the original Course and Section (**Daily** > **Academic Records** > **Schedule Classes**).
8. Click **Save** and the Copy Registration Track form will automatically close.

Registration

The Registration Wizard makes it easy to register several students in a class section at the same time. You specify term and class section in which to register the students, and CampusNexus Student provides a list of students for whom the course is on their program version list. A Track Registration Exception Report is provided upon completion of the Registration Wizard process showing all students who were not registered along with details and reasons.

Note: To register a student individually in a class section, select the student and navigate to View > Academic Records > Schedule.

The batch registration wizard includes two options: Term or Track registration.

With Track registration, you can register students into a predefined track of classes. The track defines the schedule of courses to be used for registration. After selecting the track, you can select one or more groups of students to be registered into the track. (Using the student groups is not required for track registration.) When the groups are selected and you click Next, all students in the groups are added to the selected students list for registration. (Students are not added to the selected students list if they are on Registration hold.) Individual students can be added or removed from the selected students list before finishing the registration. The track registration method registers only those students that have the course on their class schedule with a status of Future or Scheduled.

CampusNexus Student checks the hold code for registration. If a student is in a group that is in the hold list, CampusNexus Student does not allow the student to be registered.

Parent and Dependent Courses

For schools that use track registration, students can only be registered in "Parent" courses. You can only register students in "Dependent" courses using term registration.

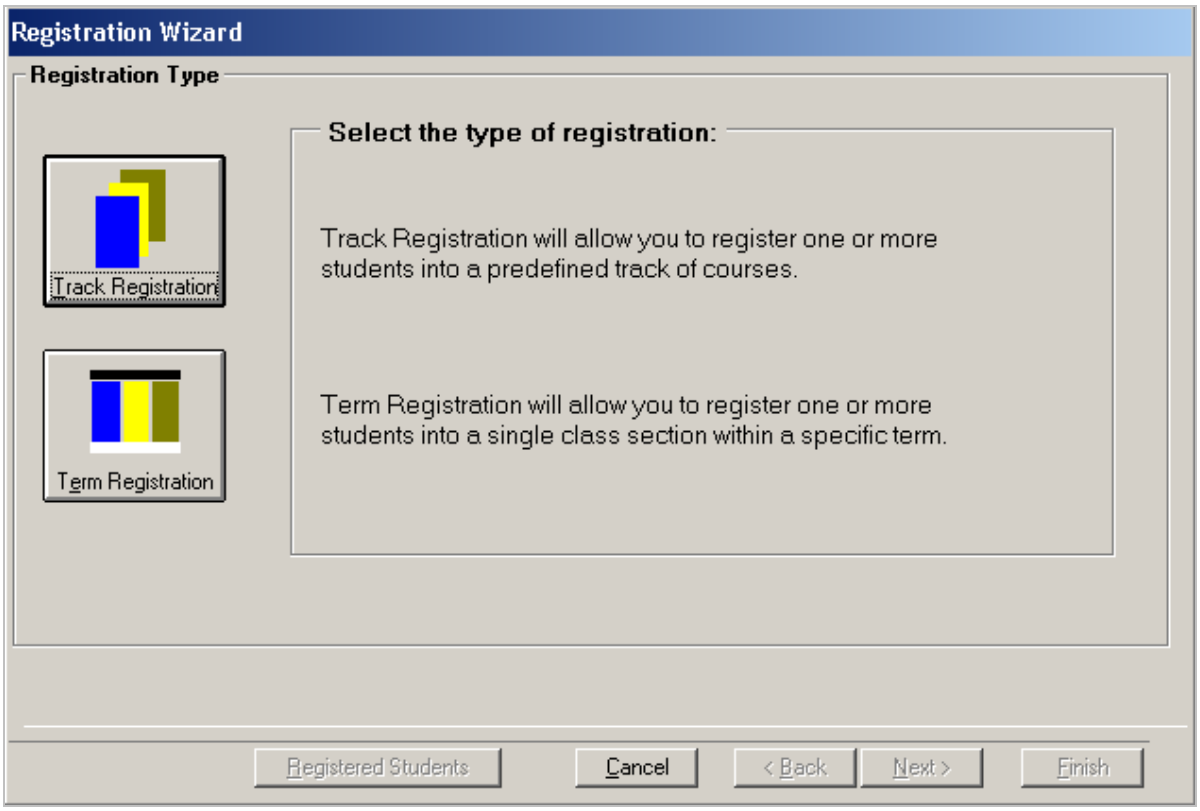
If you are registering students for a course defined as "Dependent", the criteria to display the available students on the registration form are modified. Before loading the registration form, the course section selected is evaluated to check if the course is defined as a "Dependent" course or a "Parent" course.

- If the course is a "Parent" course, the logic for populating the Students Available list box remains the same.
- If the course is a "Dependent" course, the Students Available list box is populated with students who are currently scheduled for any "Parent" course in the selected term.

Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

To register a batch of students in a class section:

1. Navigate to **Daily > Academic Records > Registration**. The Registration Wizard is displayed.

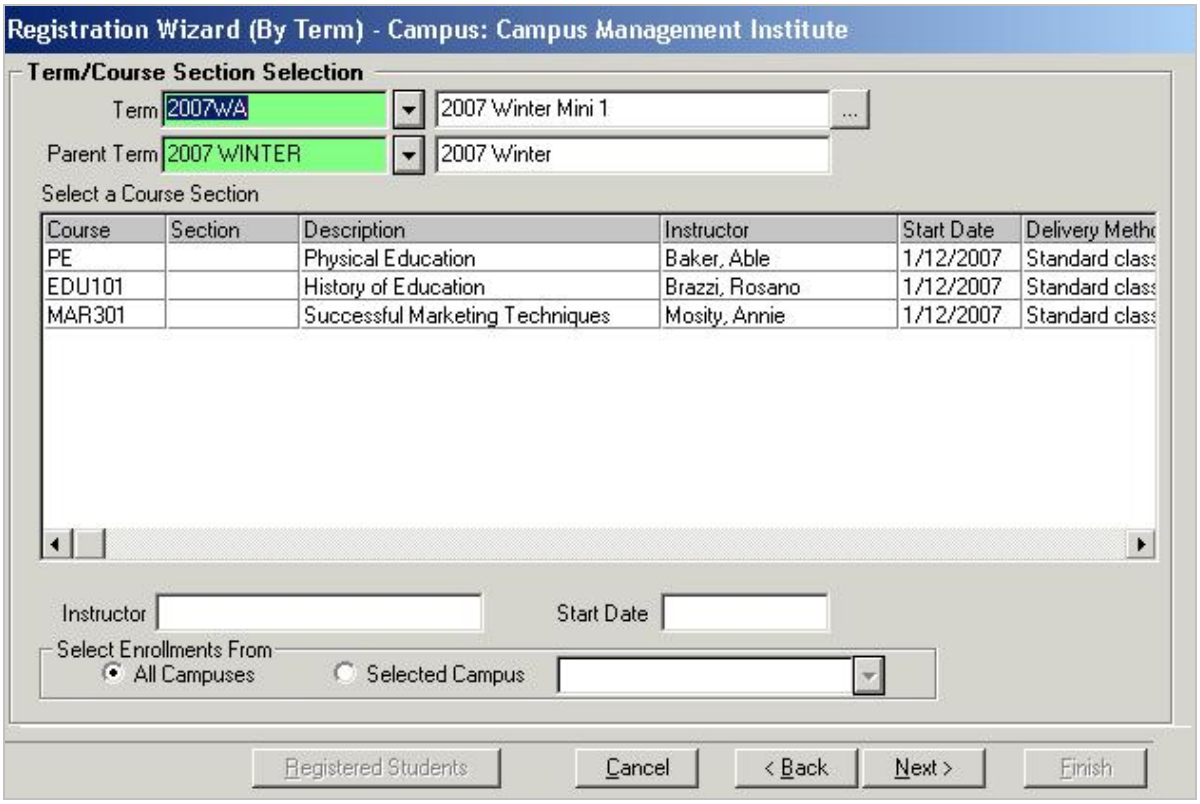


2. Click **Track Registration** or **Term Registration**.
3. Click **Next** to proceed.

Depending on your selection in step 2, continue with Track Registration or Track Registration.

To register a batch of students in a class section by term:

1. If you select **Term Registration** on the first page of the Registration Wizard, CampusNexus Student continues the process with the following steps.



2. Select the **Term** for which the students are to be registered. All the class sections scheduled for the term are listed on the grid.

   Click on a row of the grid, to view the instructor and start date in the fields at the bottom of the form.

   You can sort the class section list by clicking on the column headers. For example, to see all the class sections for a given instructor, scroll to the right until the Instructor column header is visible. Click the column header and scroll down the list until you see the instructor's courses.

   If the Campus uses Term Relationships, the Term list shows the child terms in which courses have been scheduled. When the (child) term is selected, the Parent Term list contains only Parent Terms to the previously selected child term. The (child) Term must be selected prior to selecting the Parent Term.

   CampusNexus Student checks if the student is currently enrolled in the selected course for the selected term and whether the student has already competed the selected course for the selected term. If so, then you are attempting to register a student in overlapping terms. As a result, CampusNexus Student displays an informational message.

3. Select the **Class Section** for which the students are to be registered. The Class Section list contains available options for the selected term. The Instructor and Start Date for the class section you choose are displayed below the grid.

4. In the Select Enrollments From area, select **All Campuses** or **Selected Campuses**. If you choose the latter, select a campus from the list. Only the students that are enrolled or active in the selected campus or campuses will be selected for registration.

5. Click **Next**. Page two of the Registration Wizard is displayed. Students who are available to take the course are listed on the left side of the form. Students who have been selected to take the course are listed on the right side of the form.

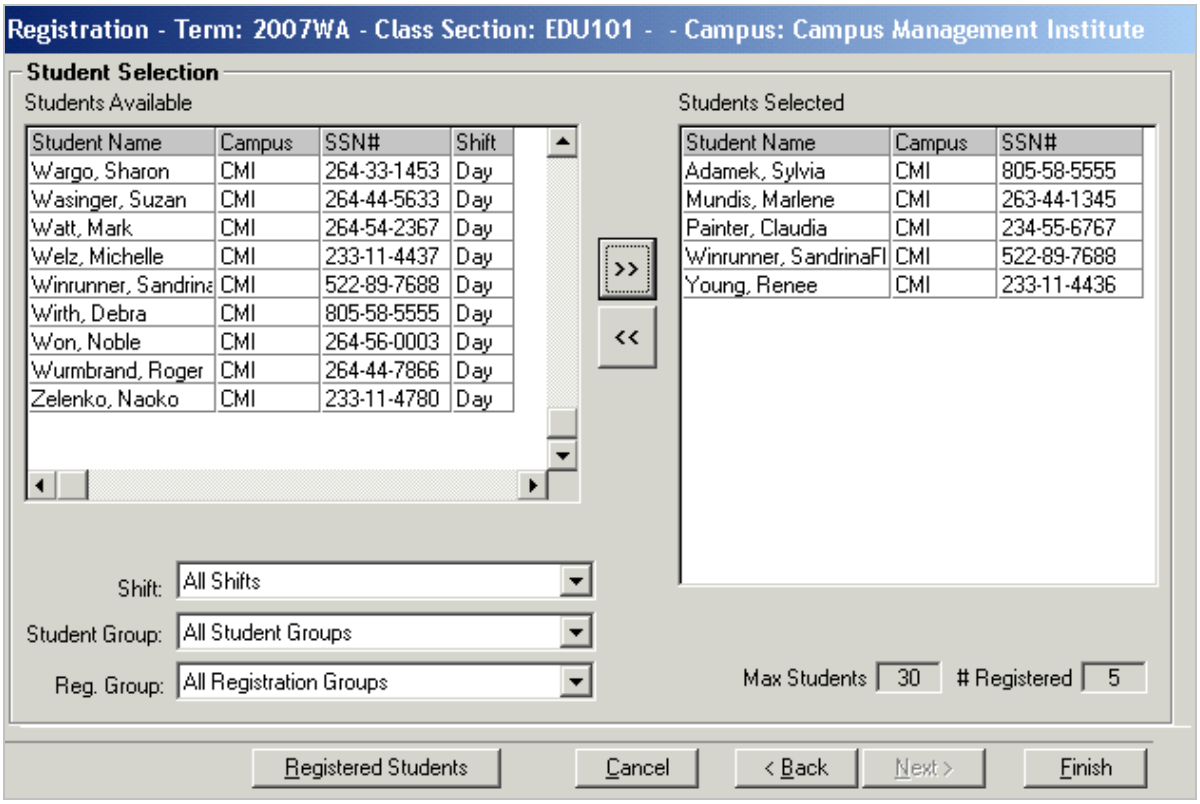
Only students not registered are listed in the Students Available list.

- To limit the students in the Students Available list by Shift, make a selection from the **Shift** list.
- To limit the students in the Students Available list by Student Group, make a selection from the **Student Group** list.
- To limit the students in the Students Available list by Registration Group, make a selection from the **Reg. Group** drop-down list.

The "Max Students" and "# (Number) Registered" fields list the number of students currently registered for the course and the maximum number of students allowed to be registered for the course section. The number of students registered field is redisplayed as students are selected for and deselected from the course section.

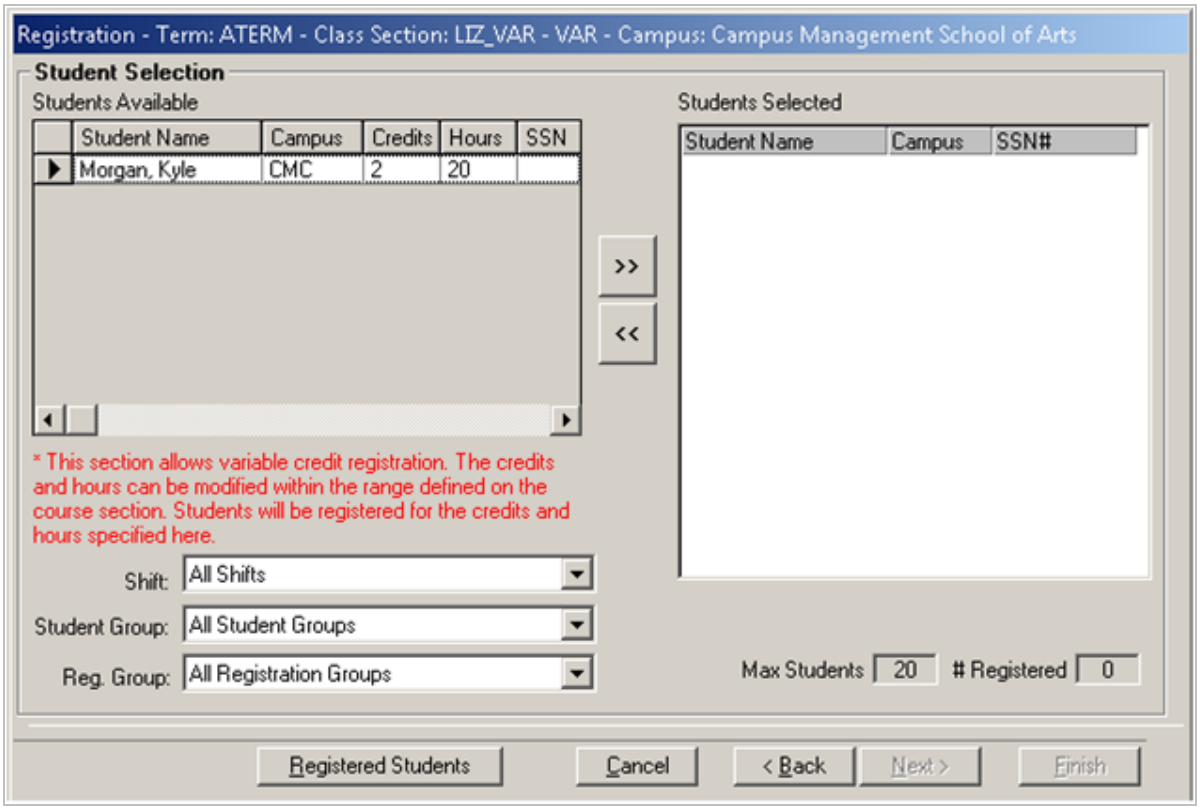
Click **Registered Students** to view the students registered. Students registered in a dependent course do not add to the count of registered students.

Note: You can select any active Registration Group, regardless of the Student Groups defined for it. If all students are members of inactive Student Groups, CampusNexus Student displays a warning stating, "*There are no students in the selected Registration Group that require this course.*"



6. To select a student for registration in the class section, double-click the name of the student in the **Students Available** column or select the student and click the right arrow button [>>] between the lists. The student's name will be moved to the **Students Selected** column.
7. To unselect a student for registration in the class section, double-click the name of the student in the **Students Selected** column, or select the student and click the left arrow button [<<] between the lists. The student's name will be moved to the **Students Available** column.
8. If Term Registration is being performed for a variable credit course, you can change **Credits** and **Hours** for each

student.



9. When you have selected your list of students for the class section, click **Finish**.

   Note: If student registration lock configuration is enabled, while registering a student through Track Registration or Term Registration, upon clicking **Finish**, the Registration Locks are evaluated.

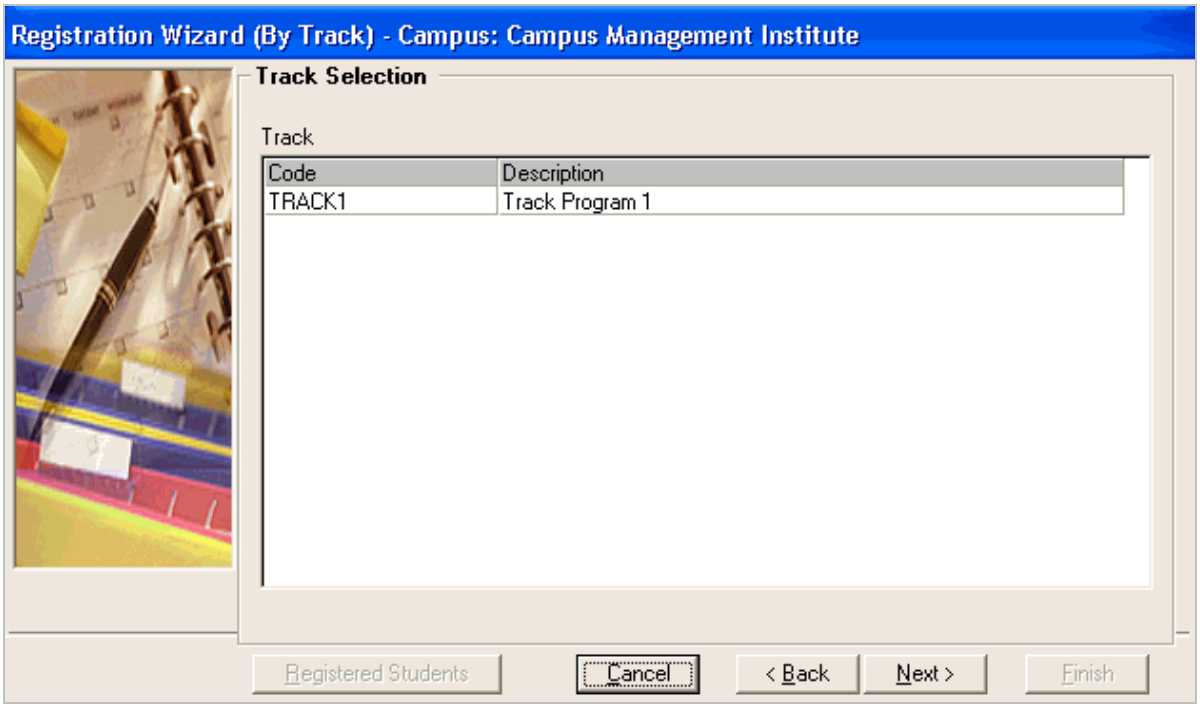
   - If CampusNexus Student detects that a selected student has already taken the class, or is scheduled to take the class in the future, it will highlight the student's name. You can then remove the student from the list.
   - If CampusNexus Student detects a Date/Time Conflict in a student's schedule, it will not permit the student to be registered. Remove the student from the Students Selected list.
   - CampusNexus Student checks the maximum number of students allowed in the class section. CampusNexus Student does not allow the maximum to be exceeded. It checks for equal to or greater than the maximum number of students allowed for the class section. To add more students to the section, you must adjust the maximum students value under Daily > Academic Records > Schedule Classes.
   - CampusNexus Student also checks that each student meets the prerequisite/corequisite requirements for the course.

   See Registration Validation below for more on system checks performed during registration.

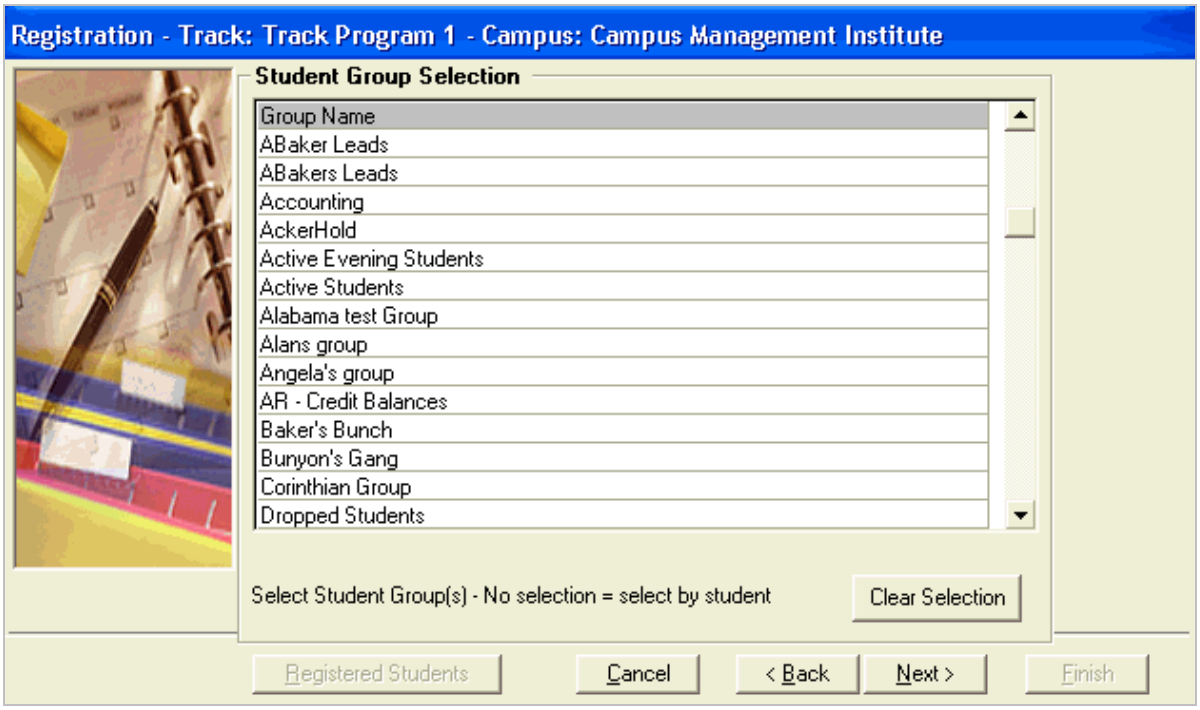
10. When all selected students pass the validation tests, CampusNexus Student displays a message indicating that the registration is complete. Click **OK** to close the message and the registration form.

To register a batch of students in a class section by track:

1. If you selected to register the students by Track, the second page of the Registration Wizard contains a Track Selection grid.



2. Select the **Track** for which you want to register students.
3. Click **Next**. CampusNexus Student displays a list of student groups from which you can choose one or more groups.



4. Select the **Group(s)** to be included in the track registration from the Student Group Selection list. If you prefer to select students for registration individually rather than by group, click **Next**.

   To choose more than one group:

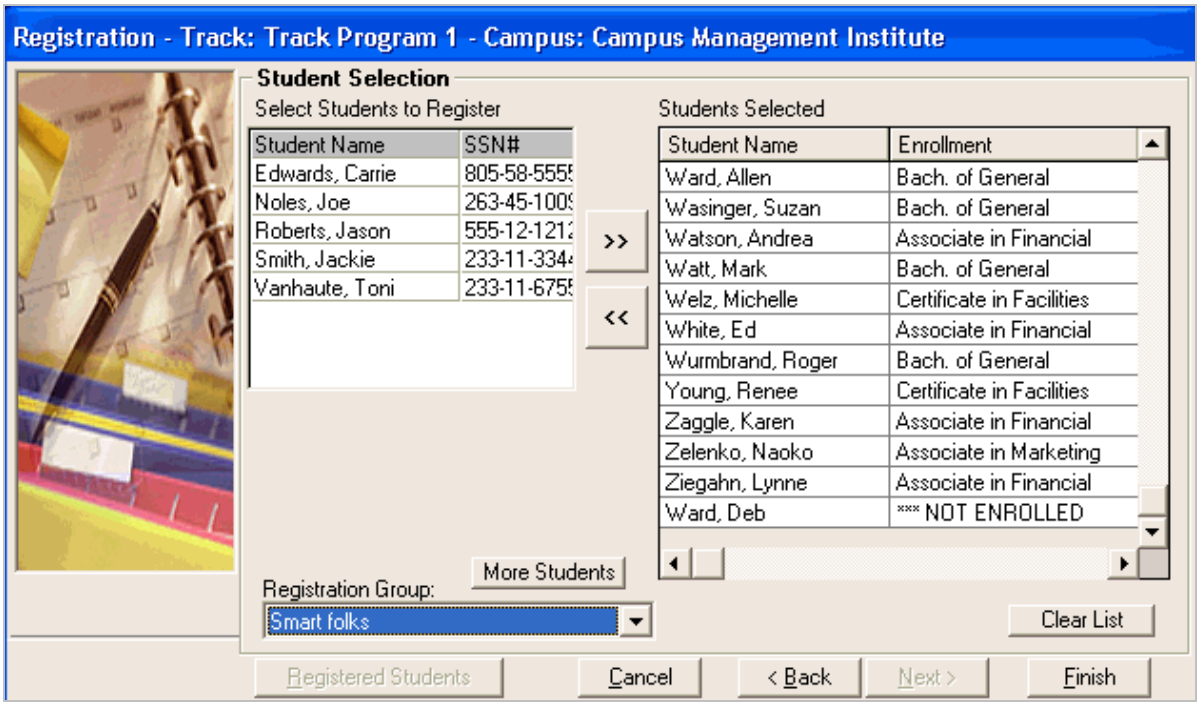
   - If the groups are listed together, click the first group name, then hold down the **Shift key** while you click the last group name.
   - If the groups to be selected are not together, hold down the **Ctrl key** while clicking the group names to be included.
   - Click **Clear Selection** to unselect those groups that have been selected.

5. Click **Next**. CampusNexus Student lists the students that can be registered in the track.

   - If you selected one or more student groups, the students are listed under **Students Selected**.
   - If you selected students individually from the list of those eligible for the track, the students are listed under **Select Students to Register**.

   Click **Registered Students** to view the students registered. Students registered in a dependent course do not add to the count of registered students.

   Note: To filter the students by Registration Group, make a selection from the **Registration Group** list. You can select any active Registration Group, regardless of the Student Groups defined for it. If all students are members of inactive Student Groups, CampusNexus Student display a warning stating, "*There are no students in the selected Registration Group that require this course.*"



6. To select a student for registration in the class section, double-click the name of the student in the **Students Available** column or select the student and click the right arrow button [>>] between the lists. The student's name will be moved to the **Students Selected** column.
7. To unselect a student for registration in the class section, double-click the name of the student in the **Students Selected** column, or select the student and click the left arrow button [<<] between the lists. The student's name will be moved to the **Students Available** column.
8. When you have selected your list of students for the class section, click **Finish**. When the registration process is complete, CampusNexus Student displays a confirmation message.

   Note: If student registration lock configuration is enabled, while registering a student through Track Registration or Term Registration, upon clicking **Finish**, the Registration Locks are evaluated.
9. Click **OK** to acknowledge the message. CampusNexus Student closes the wizard.
10. Repeat steps 1 through 9 to register students in another track.

Registration Validation

Registration conflicts are checked during Term Registration and Track Registration. CampusNexus Student checks the following items when registering a student into a class section:

1. **Maximum Students in Class**. CampusNexus Student checks how many students are registered for the class against the maximum allowed in the class.
   - If you are set up in Staff Setup with permission to override the maximum,you can override the maximum.
   - If you do not have the permission to override the maximum, a message states that the you cannot register students.
2. **Prerequisites**. If a student has not taken a course that is a prerequisite to the course being registered, a message

lists the prerequisite and corequisite requirements of the course. You can click on highlighted areas of the message to view additional details about the prerequisite and corequisite requirements.

When checking prerequisites, CampusNexus Student ensures that the section end date of the prerequisite course is in the past when compared to the section start date of the course for which the prerequisite course is required.

For term registrations, if you have the permission to override the course prerequisite requirement and a student does not meet the requirement, you can override the requirement.

Note: The override option is not available for track registrations. To check for courses that failed registration, refer to the Track Registration Exception Report.

If you do not have permission to override prerequisite courses that have not been completed, you cannot to perform the registration.

3. **Corequisites**. Corequisite courses must be taken concurrently in the same term.

   Note: Corequisite courses must be scheduled in the same registration term for registration to be completed (unless the administrator has override authority). For example, an institution may be using Parent-Child terms with the Parent Term having two Child terms. One corequisite course is offered in Child Term 1 and the second corequisite course is offered in Child Term 2. If a student is registered for the corequisite course in Child Term 1, CampusNexus Student notifies the registrar that the course is a corequisite and that the other corequisite must be completed at the same time (Child Term 1). If you have override permissions, you may override the corequisite requirement and register the course.

   If a student is not taking the corequisite courses required with the course being registered, a message lists the prerequisite and corequisite requirements of the course. You can click on highlighted areas of the message to view additional details about the prerequisite and corequisite requirements.

   For term registrations, if you have the permission to override the course corequisite requirement and a student does not meet the requirement, you can override the requirement.

   Note: The override option is not available for track registrations. To check for courses that failed registration, refer to the Track Registration Exception Report.

   If you do not have permission to override corequisite courses that have not been completed, you cannot perform the registration unless the student is registering in all required corequisite courses at the same time.

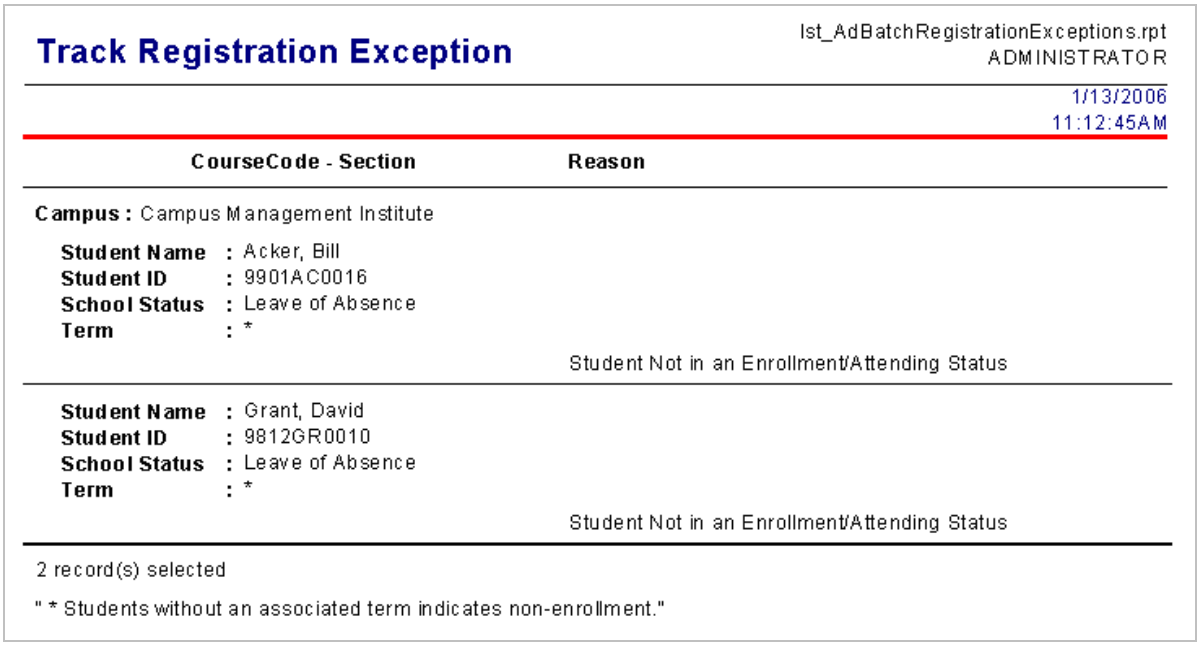
4. **Currently Taking**. If the student is already registered for the class, a message indicates that the student cannot be registered again.
5. **Already Taken**. If the student has already taken the course, a message asks if this class should be registered again as a RETAKE.
6. **Conflicts**. If the class being scheduled meets on the same date and time as another class that is already on the student's schedule, you are prompted confirm if it is OK to register anyway. A message lists the course(s) that are in conflict. If you have permission to override the conflict, a message asks if you want to override the conflict. If you do not have the permission to override the conflict, the current registration is not allowed.

Track Registration Exception Report

Upon completing the Registration Wizard, if there are any students that were not registered, the following message is displayed: *Track Registration completed with exceptions.*

The Track Registration Exception Report list students who could not be registered and the reasons why they could not be registered. Some of the reasons that students were not registered could include failure to meet prerequisite/corequisite requirements, currently taking the class, already taken the class, or maximum class size exceeded.

Notice that the exception report lists the reasons for the students not being enrolled as indicated by the "Student Not in an Enrollment/Attending Status" message. The asterisk (*) next to the Term label references the footnote containing an explanation: "* * Students without an associated term indicates non-enrollment". The two students listed on the report did not qualify for registration and therefore appeared on the exception report. The Registration wizard registered the other students.



Track Registration Exception

lst_AdBatchRegistrationExceptions.rpt
ADMINISTRATOR
1/13/2006
11:12:45AM

CourseCode - Section	Reason
Campus : Campus Management Institute	
Student Name : Acker, Bill **Student ID** : 9901AC0016 **School Status** : Leave of Absence **Term** : *	Student Not in an Enrollment/Attending Status
Student Name : Grant, David **Student ID** : 9812GR0010 **School Status** : Leave of Absence **Term** : *	Student Not in an Enrollment/Attending Status

2 record(s) selected

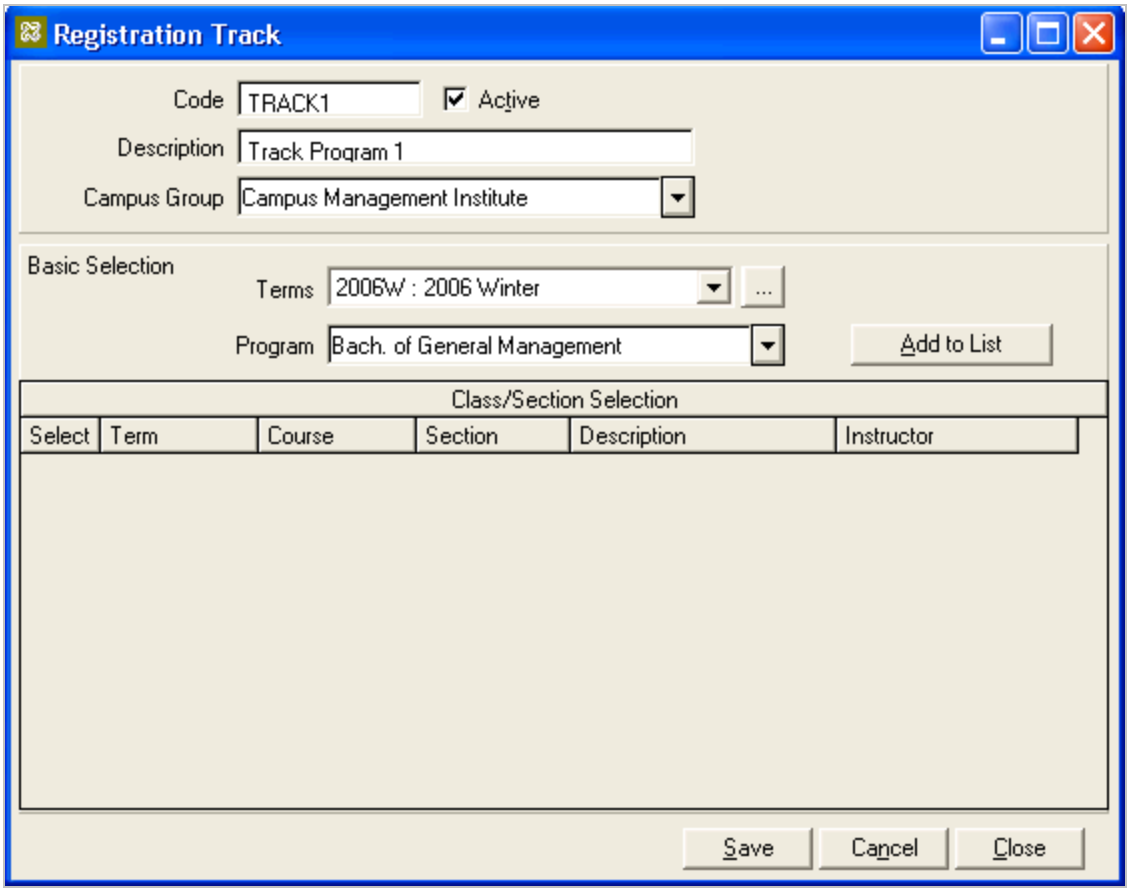
" * Students without an associated term indicates non-enrollment."

Copy Registration Tracks

CampusNexus Student allows you to copy the entire content of a registration track and assign that information to a new registration track. The new registration track can then be associated with the same term(s) as the original track or with other terms. You can also add or delete courses from the track after the copy function is complete.

To copy a registration track:

1. Select **Daily > Academic Records > Setup Registration Tracks**. CampusNexus Student displays a list of Registration Tracks in a grid.
2. Select a registration track from the grid and click **Copy**. The Copy Registration Track form is displayed.
3. Specify a unique **Code**.
4. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
5. Enter a **Description**.
6. Select the **Term(s)**. You can select same or different term(s) to associate with the new registration track.
7. Click **Finish**. After the track is copied, the Registration Track form is displayed. The Registration Track form presents the complete track information for the new track, including: **Code**, **Description**, **Campus Group(s)**, **Term(s)**, and **Program(s)**. If required, you can edit the details on this form.



8. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

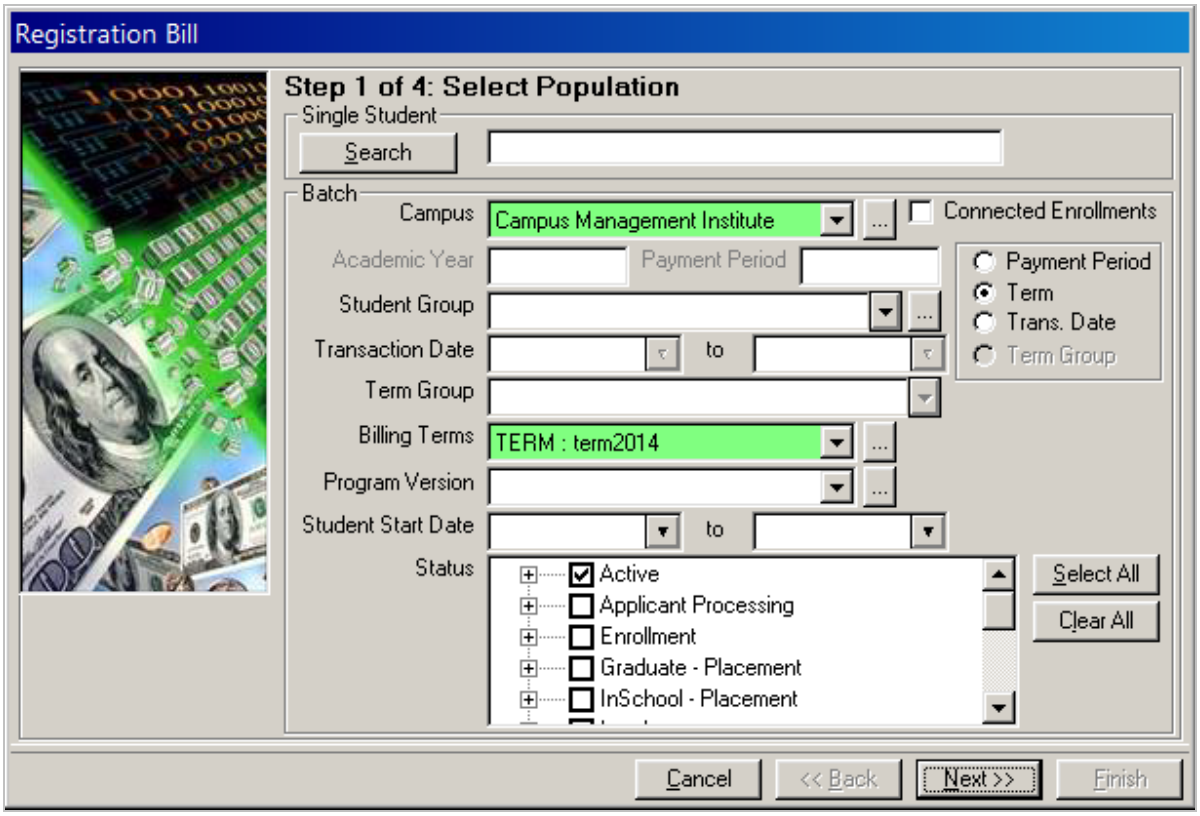
Note: If any courses that are part of the new track are not scheduled within the term(s) the user has selected, the track is not saved. The user receives a message that the track cannot be saved. The message lists the course(s) that are not scheduled with the selected term(s).

Registration Bill

Use this form to produce student bills or a summary report. See also Registration Bill Defaults and Purge Billing Statement Records. The Registration Bill functionality was previously referred to as 'Registration Summary by Term'.

To run the Registration Bill wizard:

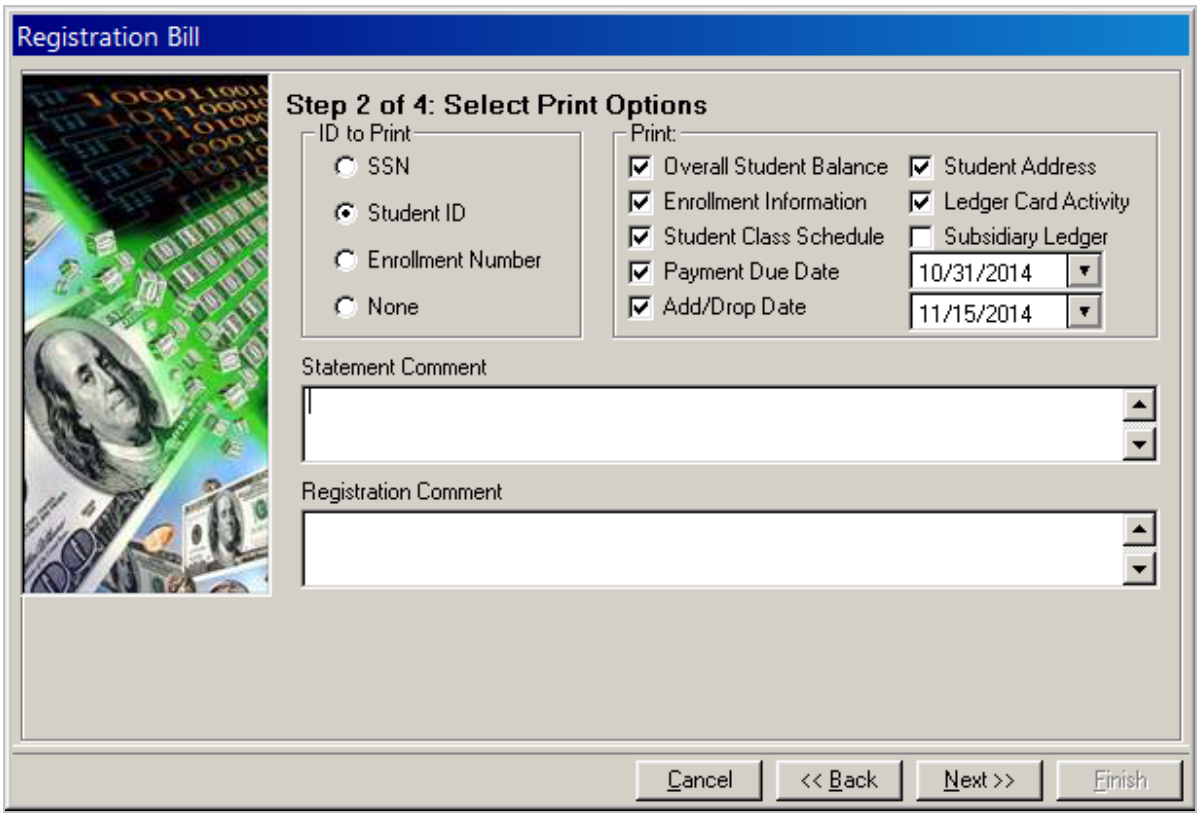
1. Navigate to **Daily** > **Academic Records > Registration Bill**.
   - OR -
   Navigate to **Daily > Student Accounts > Student Billing Statements > Registration Bill**. Step 1 of the Registration Bill wizard is displayed.



2. Search for a **Single Student** or specify selection criteria for a **Batch** of students. If you search for a single student, the batch selection options are disabled.
3. Select a billing period. The options are:
   - Payment Period
   - Term
   - Transaction Date
   - Term Group
4. If applicable, select **Connected Enrollments**. With this selection the options the following options enabled are: Term, Transaction Date, and Term Group.

You can print batch Registration Bills for connected enrollments, with combined detail and aggregated summary information. Connected enrollment information will be printed even if both of the connected enrollment's campus or program version is not selected.

5. Depending on your billing period selection, complete any other required fields.
6. Click **Next**. Step 2 of the Registration Bill wizard is displayed.



7. Select the ID to Print on the registration bill. The options are:

   - SSN
   - Student ID
   - Enrollment Number
   - None

   Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

8. Select additional information to print on the bill.

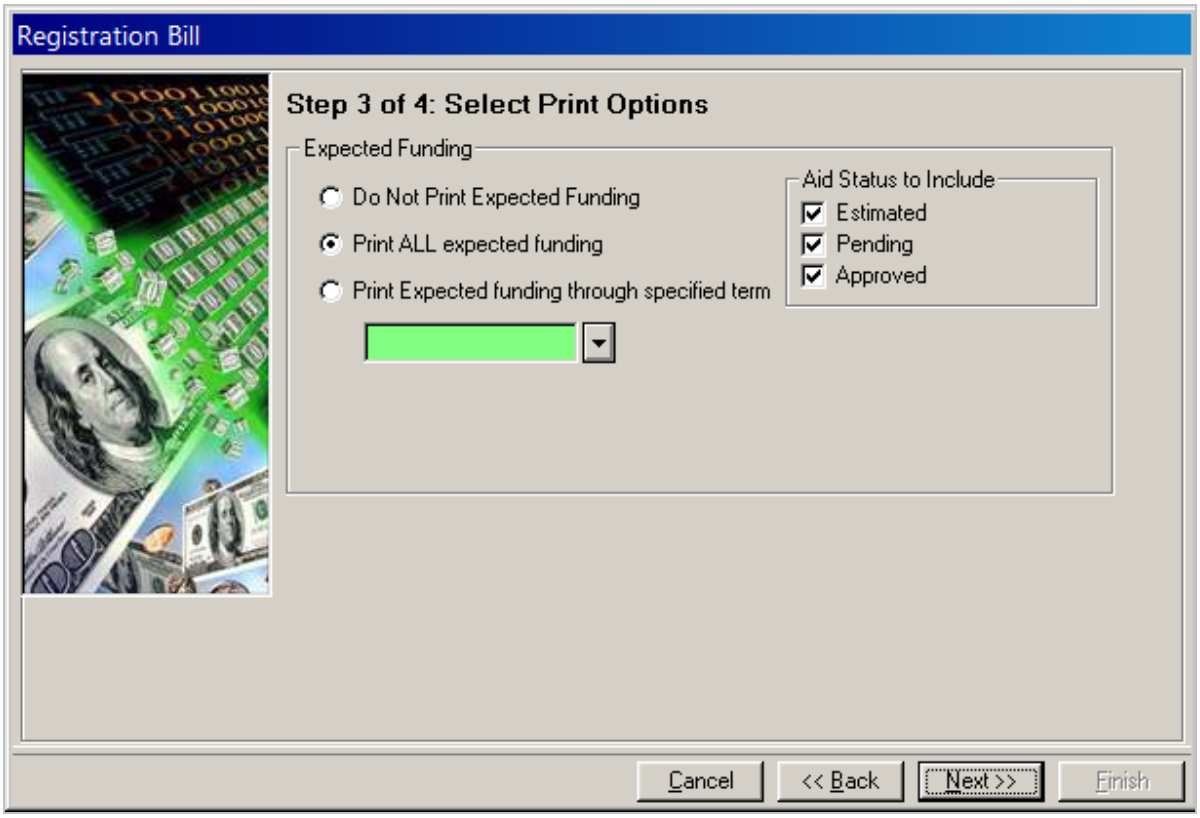
   If you select **Payment Due Date** and **Add/Drop Date**, specify the respective dates.

   Note: Student Class Schedule is enabled only if a single term was selected on the previous form.

9. *Optional*: Enter a **Statement Comment** and **Registration Comment** to print on the student bill. Do not use special characters like & and < in your comments.
10. *Optional*: Select **Subsidiary Ledger**. If this option is selected, the report will include a sub report showing the

subsidiary information for the enrollment. For single or multiple enrollments, the subsidiary ledger information is printed for the Summary Registration Bill and the Detail Registration Bill.

11. Click **Next**. Step 3 of the Registration Bill wizard is displayed.



12. Select appropriate funding and aid status options to print on the registration bill.

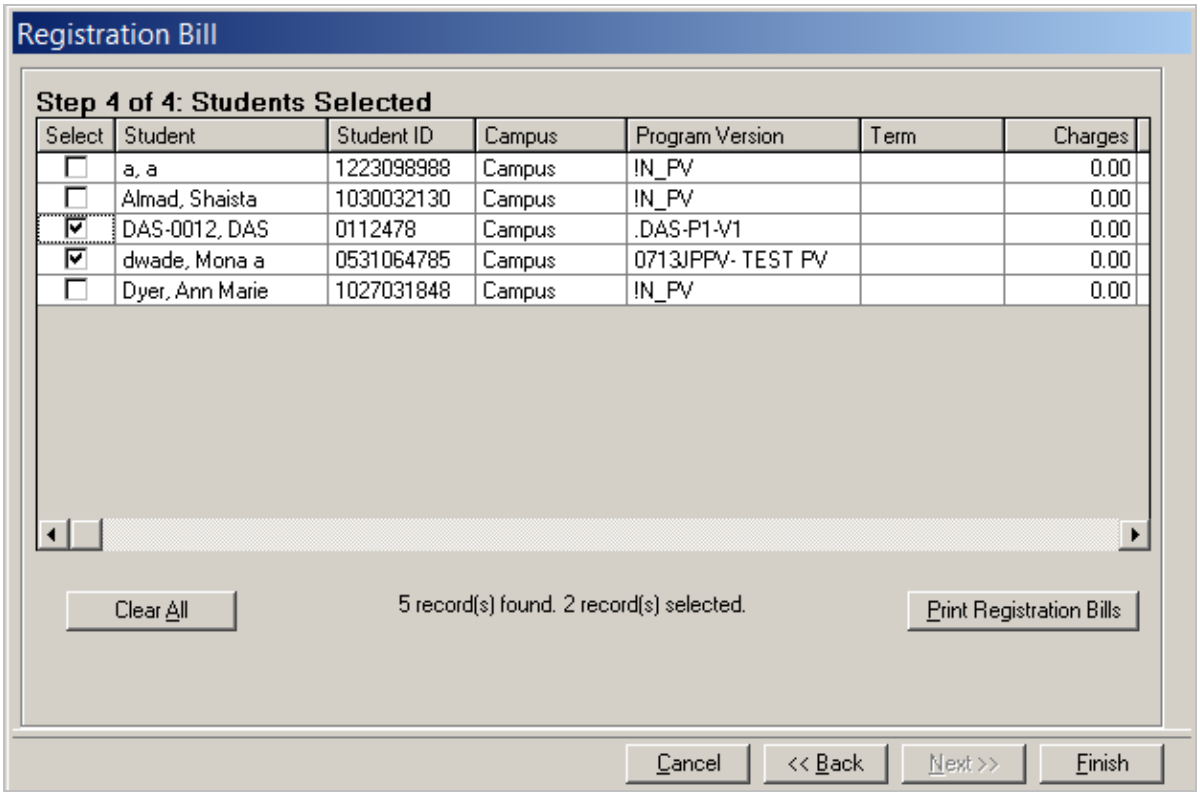
    The Billing Information group determines the charges source. Aid to be included is determined by the check boxes in this group.

    If you select **Print Expected funding through specified term**, you can specify only one term. CampusNexus Student gathers disbursements that have an expected date on or before the end date of the term selected.

    The Balance Options group allows you to specify whether the Summary and Detail reports are to be filtered based on positive, negative, and/or zero student balances.

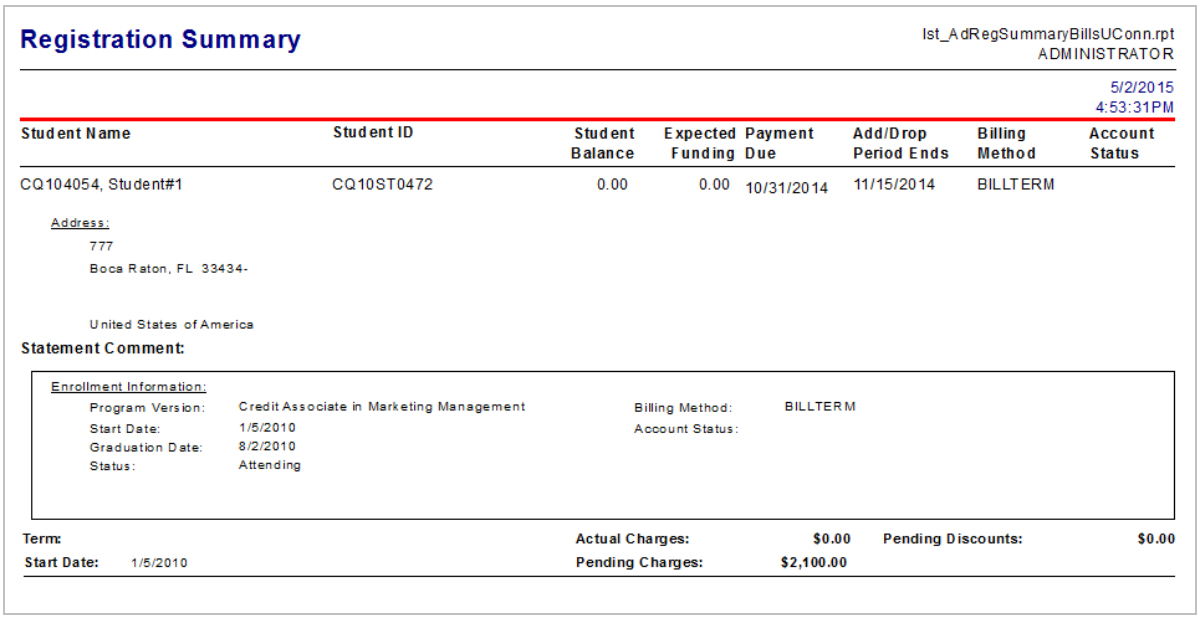
    Note: The configuration settings for Balance Options in the Registration Bill wizard override the settings in the Registration Bill Defaults.

13. Click Next. Step 4 of the Registration Bill wizard is displayed.



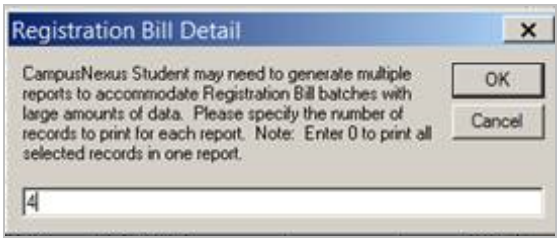
14. The Students Selected grid lists students, their enrollment, and charges. The charges column lists the Actual/Expected charges calculated for each student for the terms specified. Click the **Select** column for the students you want to include in the registration bill.

15. Depending on the settings in Registration Bill Defaults, you can print Summary or Detail bills. If only the Summary option or only the Detail option was configured in the default settings, the Print button is labeled **Print Summary Registration Bills** or **Print Detail Registration Bills**, respectively. If both Summary and Detail were configured as default settings, a pop-up menu appears when you click the Print button.



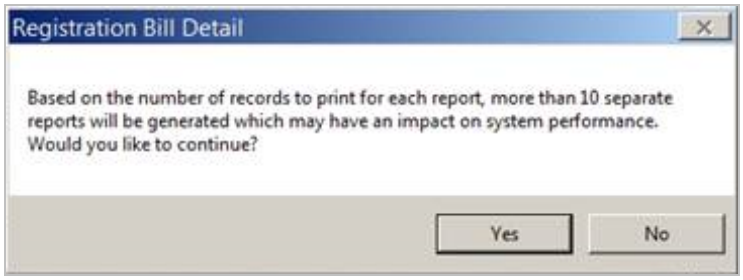
16. Click **Finish** or **Cancel** to close the form.

17. If you are printing **Detail Registration Bills**, after clicking **Print Registration Bills**, you have the choice to print all selected students to a single Crystal Report or to print the selected students in smaller batches as multiple reports. Printing multiple reports can avoid issues with system performance if the amount of selected data for a single report is extremely large.



Enter the number of desired records to be displayed on each generated report in provided field. This must be a whole number and not exceed the total number of records selected. Entering 0 prints all selected records in a single report.

If the number entered by the user generates more than 10 reports, a warning message is displayed:



Users can chose Yes and continue or chose No to cancel and re-enter a new number of records.

Batch Unregister Courses Wizard

The Batch Unregister Courses Wizard makes it easy to unregister several students in a course at the same time. You tell the wizard which Campus, Term, and Course Status the course belongs to. You may gather the course's students by Instructor or Student Group. The program provides a list of students registered for the course.

Things you should know:

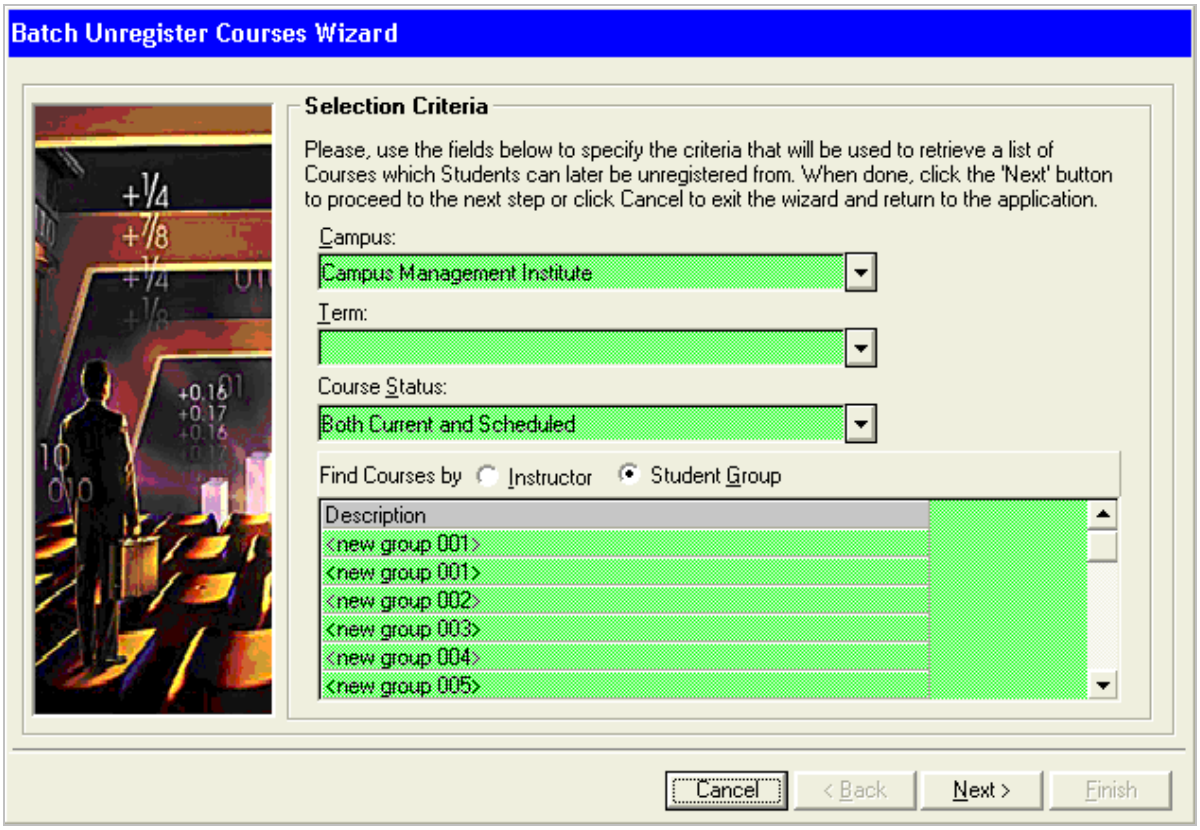
- Unregistering a student from a course will cause the Pending Charges associated with the course to be deleted if the auto billing is on and the status of the course in the student's degree audit folder will be updated to reflect a 'Future' status.
- Unregistering students in Course Registration Sharing Groups will NOT occur unless the course is from the sponsoring campus.
- If a Campus has been configured to enforce drop/add dates, then the wizard will NOT unregister students from courses in cases where the drop/add period has expired.
- The Terms displayed in the drop-down list will only reflect the Terms that are considered "Registration/Attendance" Terms.
- Courses that are prerequisite and corequisites for other courses will not be unregistered by the Batch Unregister process. Instead they will be listed on the Batch Unregistration Exception report generated when the wizard finishes processing.

The first page of the wizard requires that you provide information regarding the Campus, Term, and Course Status of the course that you would like to unregister. The course status options consists of Current, Scheduled or Both Current and Scheduled. If the course is not in a Current or Scheduled status then the unregister wizard will ignore the course and the unregistration process will not be available for these courses.

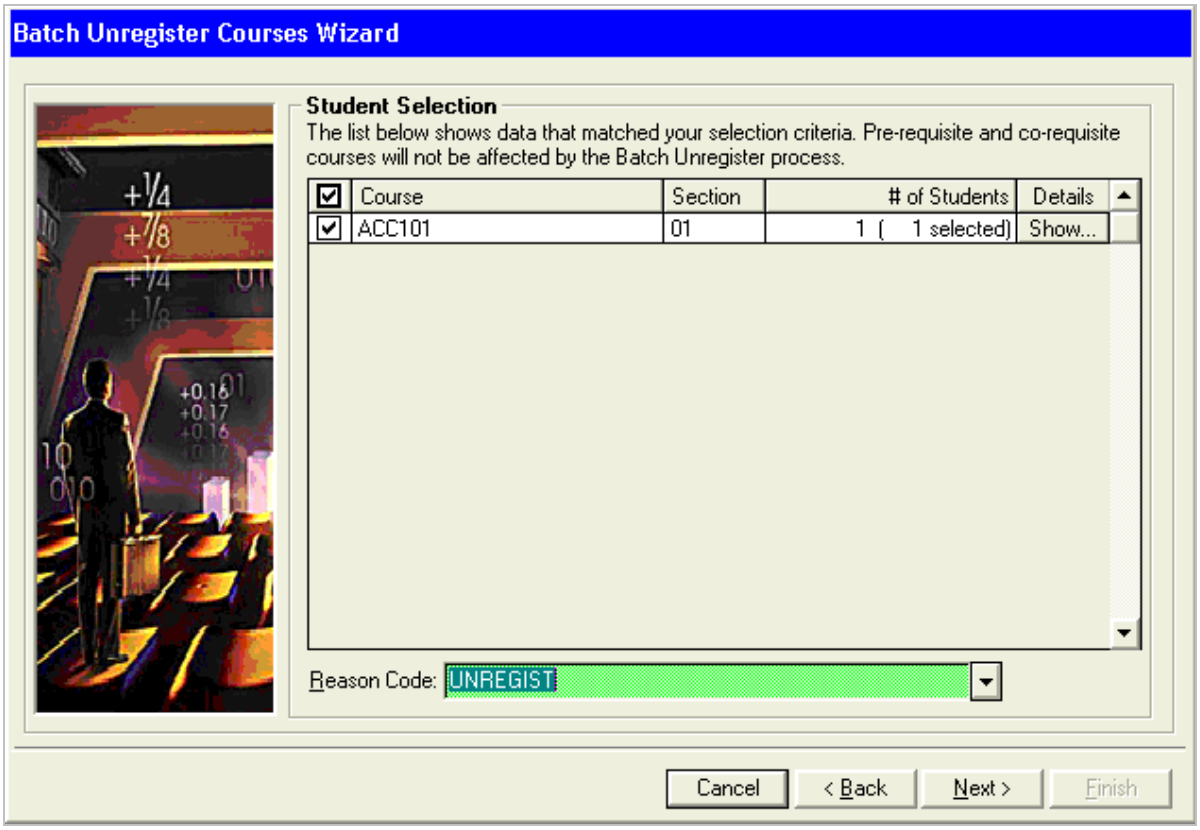
Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

To unregister a batch of students from a course:

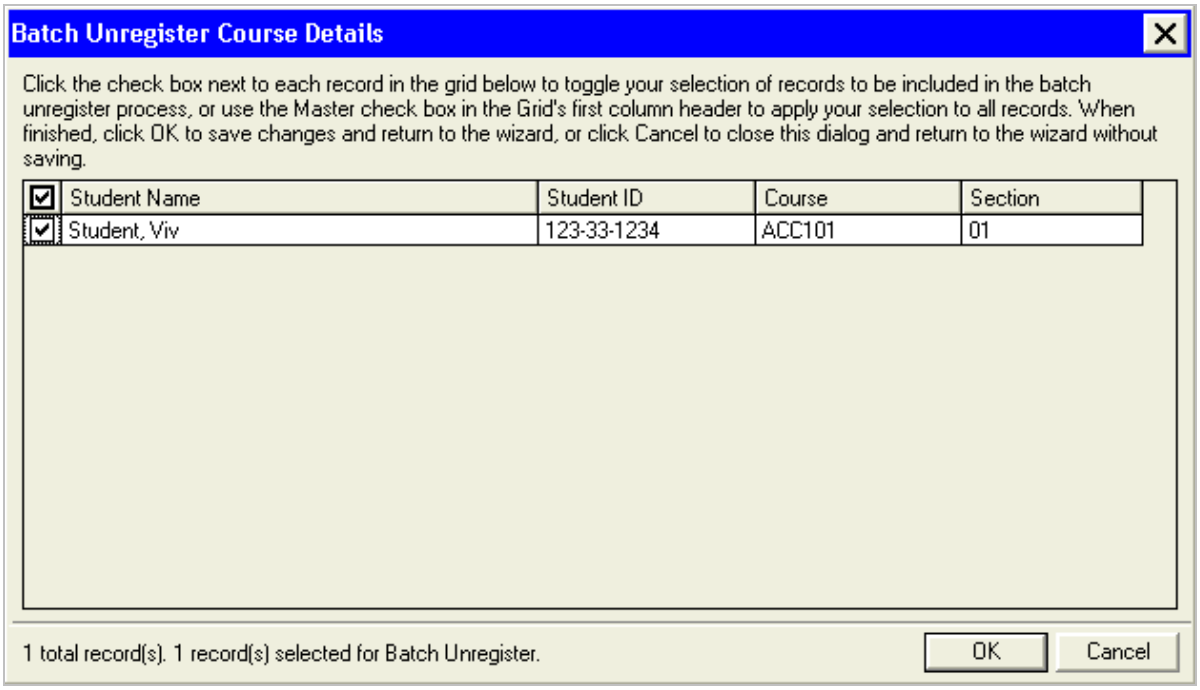
1. Navigate to **Daily** > **Academic Records** > **Batch Unregister Courses**. The Batch Unregister Courses Wizard is displayed.



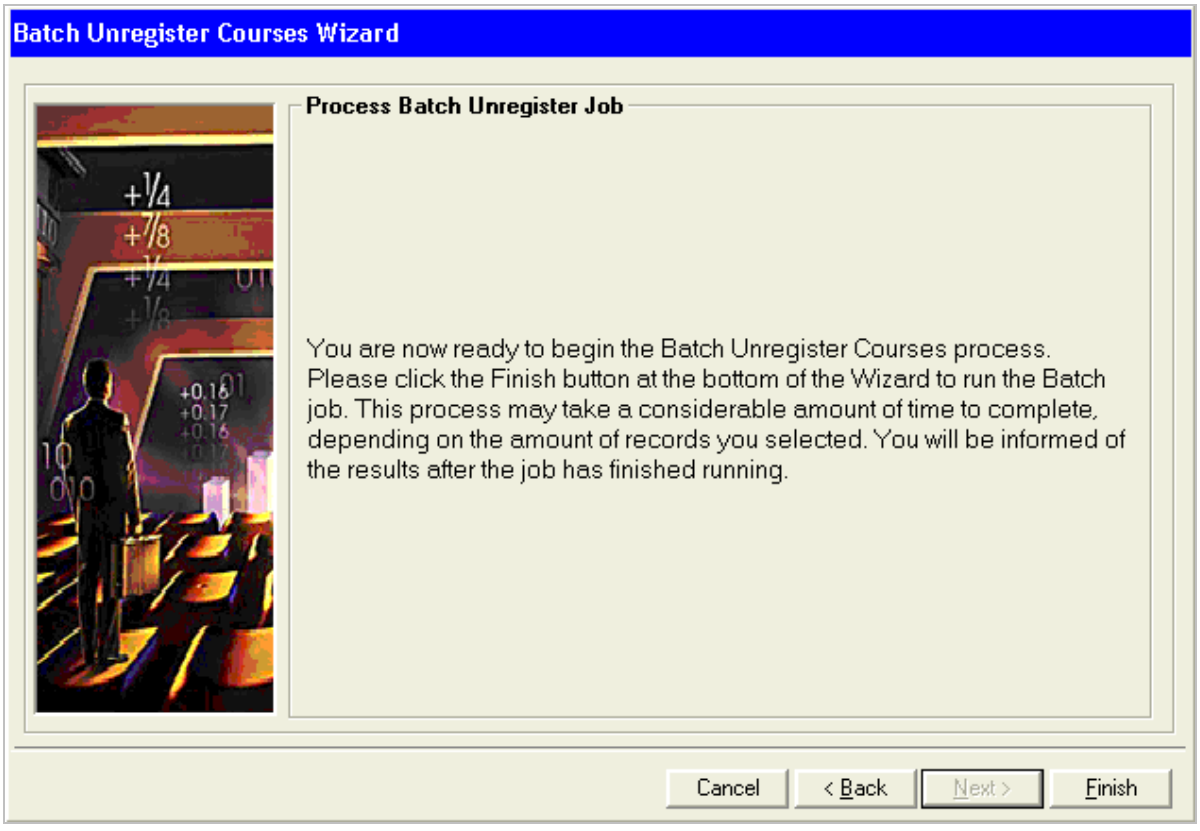
2. Select the **Campus** of the course from the drop-down list.
3. Select the **Term** of the course from the drop-down list.
4. Select the **Course Status** of the course from the drop-down list.
5. Click the **Instructor** or **Student Group** option associated with the course that you want to unregister.
6. Click **Next** to continue the unregistration processing. The Batch Unregister Courses Wizard form is displayed.



7. Click on the course that you want to unregister by selecting the check box to the left of the Course field as shown here.
8. Click the **Show** button listed under the **Details** header, in the course row, to display the students registered for the course. Select the students you want to unregister from the course by selecting the check box on the left side of the student's name. Clearing the check box for the student indicates that you DO NOT want to unregister the student from the course. If ALL students registered for the course need to be unregistered, leave the checks marks in the check boxes for ALL students listed.



9. Select the **Reason Code** for unregistering the class from a list of predefined reasons associated with the unregister wizard process.
10. Click **Next.** .



11. Click **Finish** to continue. A confirmation message is displayed. Click **OK**.

Note: If student registration lock configuration has been enabled, while unregistering a student through the **Batch Unregister Courses Wizard**, upon clicking **Finish**, the Registration Locks will be evaluated.

Rosters

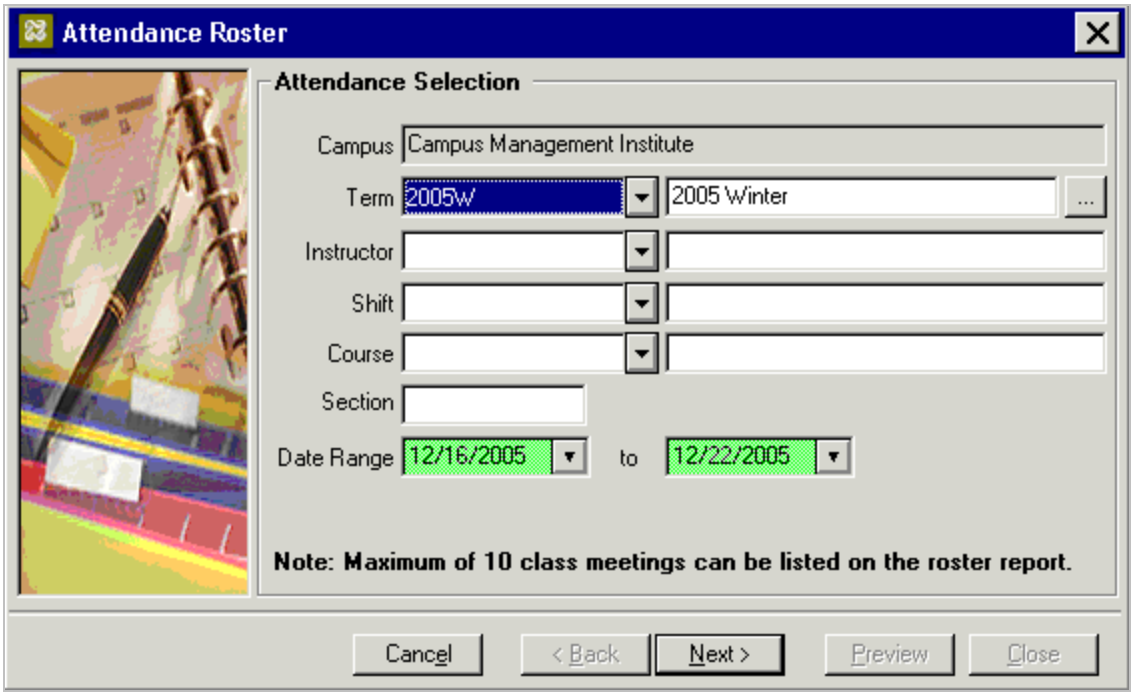
You can provide your instructors with a convenient form for taking attendance in their class sections. By using the Attendance Roster wizard, you can select a group of class sections for which to print rosters. Rosters are printed for one week at a time. For a given class section, all meetings during the week are listed on the roster. The instructor can indicate a student's attendance for each meeting of the class. (See the example report included in this topic.)

The agency sponsor code is included for each student on the attendance rosters. This information is important to list on the roster as each agency may have special requirements concerning attendance. Listing the agency code on the roster makes it easy for the instructors to identify any agency students in their class.

Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

To print Attendance Rosters for class sections:

1. Select **Daily** > **Academic Records** > **Attendance > Rosters**. The Attendance Roster wizard is displayed.



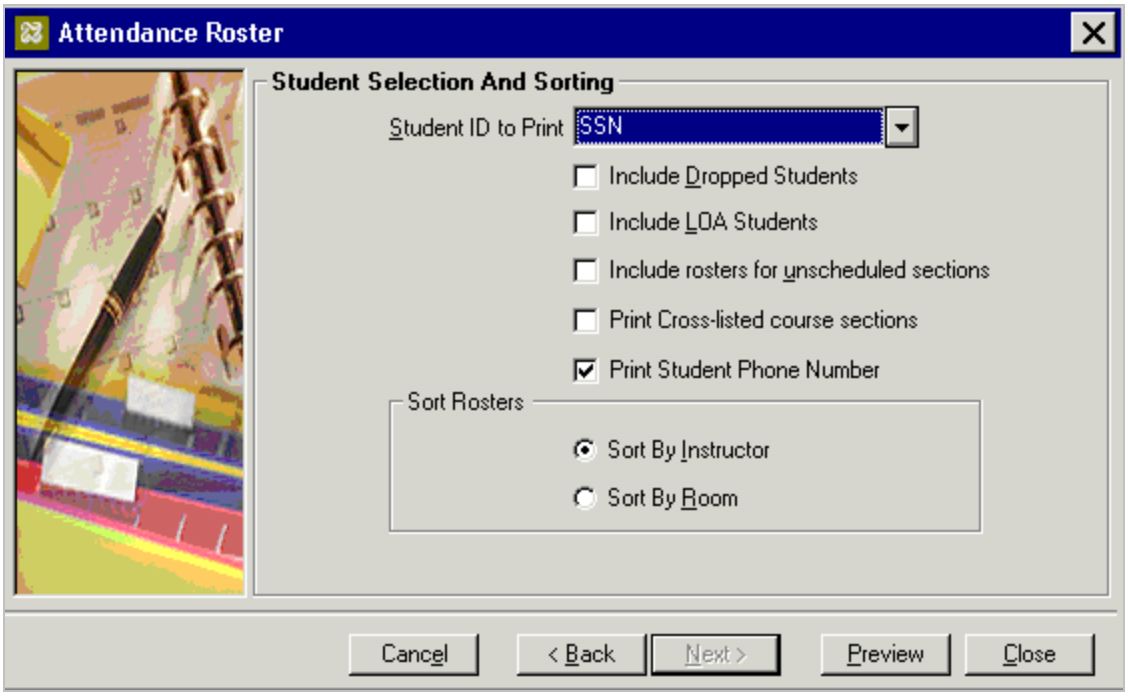
2. Select the **Term** (required). Click ... to the right of the Term field to view the Term Selection form to pick terms from a list.

   When printing rosters for a campus where the floating term flag is set to Yes, the filter on Term is replaced by a filter on class start date. Please refer to the topic on Floating Term Class Scheduling for an overall view of this feature.

   When printing rosters for floating terms, the query uses the Start Date range. For floating terms, the start date range can remain blank.

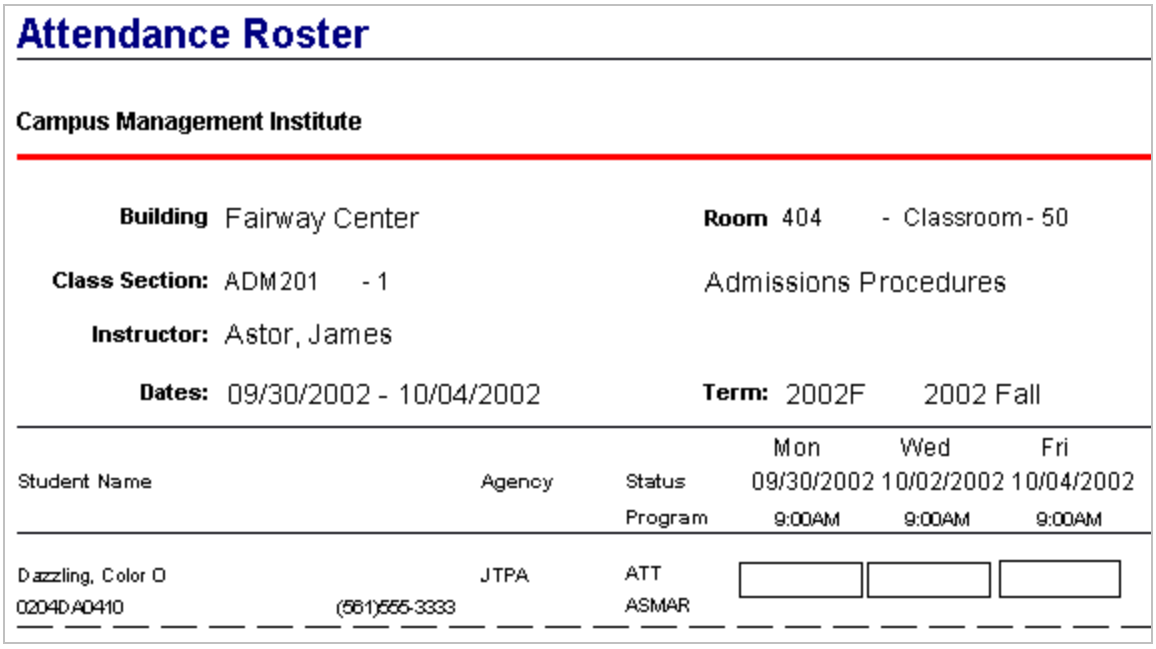
3. Select an **Instructor** (optional). If you do not select an instructor, rosters will be printed for all instructors.
4. Select a **Shift** (optional). If you do not select a shift, rosters will be printed for all shifts.
5. Select a **Course** (optional). If you do not select a course, rosters will be printed for all courses.

6. Enter a **Section Code** (optional). If you do not select a section code, rosters will be printed for all sections that are otherwise qualified for the report. **Note**: This really is the section code only, not the course code or course/section combination. If your instructors are assigned by section code, this can be a useful selection criteria.
7. Select or enter a **Date Range** (required). The date range must include no more than 10 class meetings. This is the maximum that can be printed on one row of the roster report. Remember that a class section can be scheduled to meet more than once per day.
8. Click **Next**.



9. Select the **Student ID to Print** options (SSN, Student ID, or Enrollment Number) or you select (none) to print all the students that meet the requirements of the options selected.
10. Select **Include Dropped Students** if you would like to include dropped students in the roster report, otherwise clear the option to suppress printing of the dropped students in the roster. See Drop Class Section for an explanation of this group of students.
11. Select **Include LOA Students** if you would like to include the Leave of Absence students in the roster report, otherwise clear the option to suppress them.
12. Select **Include rosters for unscheduled sections** if you would like to include the rosters for unscheduled sections in the roster report, otherwise clear the option to suppress them. See Unscheduled for an explanation of this group of students.
13. Check or clear **Print Cross-listed course sections** if you would like to print the cross-listed course sections. See Cross-listed Courses for an explanation of this group of students.
14. Check **Print Student Phone Number** if you would like the student's phone number to print on the roster otherwise deselect the option to suppress them.
15. Select a **Sort** option (required). Choose Sort by Instructor or Sort By Room.
16. Click **Finish**. The report preview will appear on your screen. A portion of an Attendance Roster is shown here,

sorted by instructor.



Attendance Roster

Campus Management Institute

Building Fairway Center **Room** 404 - Classroom - 50

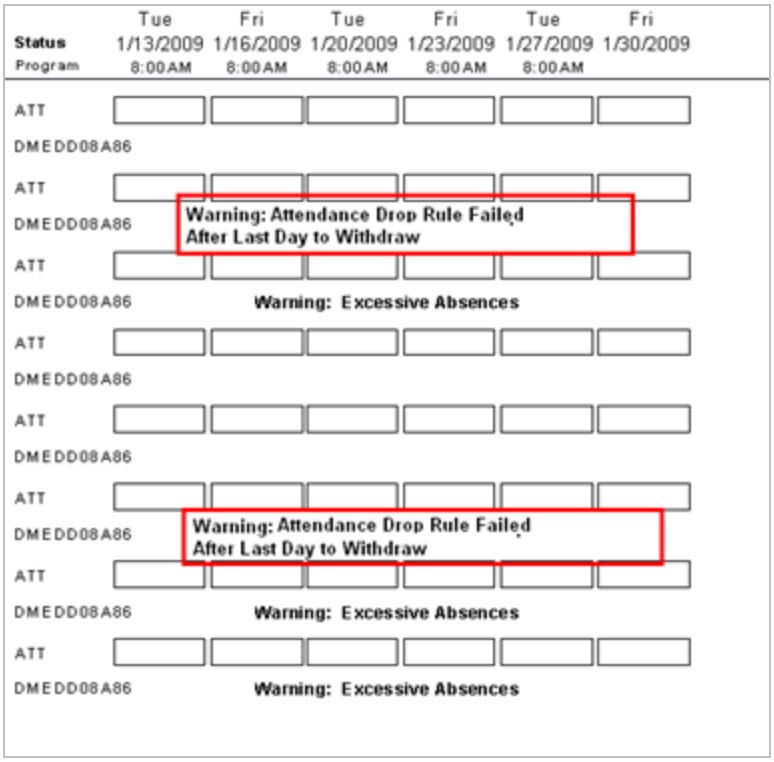
Class Section: ADM201 - 1 Admissions Procedures

Instructor: Astor, James

Dates: 09/30/2002 - 10/04/2002 **Term:** 2002F 2002 Fall

Student Name	Agency	Status / Program	Mon 09/30/2002 9:00AM	Wed 10/02/2002 9:00AM	Fri 10/04/2002 9:00AM
Dazzling, Color O	JTPA	ATT			
0204DA0410 (561)555-3333		ASMAR			

17. When posting attendance for a class section, if a course section fails the Auto Drop rule after the LDW date, and that class section has the "Drop Rule Warning When Failed After LDW" enabled, then all class roster reports will display a message alerting staff members that the Auto Drop rule failed after the LDW date.



Status / Program	Tue 1/13/2009 8:00AM	Fri 1/16/2009 8:00AM	Tue 1/20/2009 8:00AM	Fri 1/23/2009 8:00AM	Tue 1/27/2009 8:00AM	Fri 1/30/2009
ATT						
DMEDD08A86						
ATT						
DMEDD08A86	Warning: Attendance Drop Rule Failed After Last Day to Withdraw					
ATT						
DMEDD08A86	Warning: Excessive Absences					
ATT						
DMEDD08A86						
ATT						
DMEDD08A86						
ATT						
DMEDD08A86	Warning: Attendance Drop Rule Failed After Last Day to Withdraw					
ATT						
DMEDD08A86	Warning: Excessive Absences					
ATT						
DMEDD08A86	Warning: Excessive Absences					

This warning will appear regardless of whether the class section is configured for Enforce LDW within attendance rules. If the course is not dropped because Enforce Last Day to Withdraw is selected in Attendance Rules (**Daily > Academic Records > Schedule Classes > Attendance Rules**) and it is after the LDW Date, the warning will still appear on attendance rosters.

18. View or print the rosters as required. When you close the report screen, CampusNexus Student is finished with the Attendance Roster procedure.

Rosters

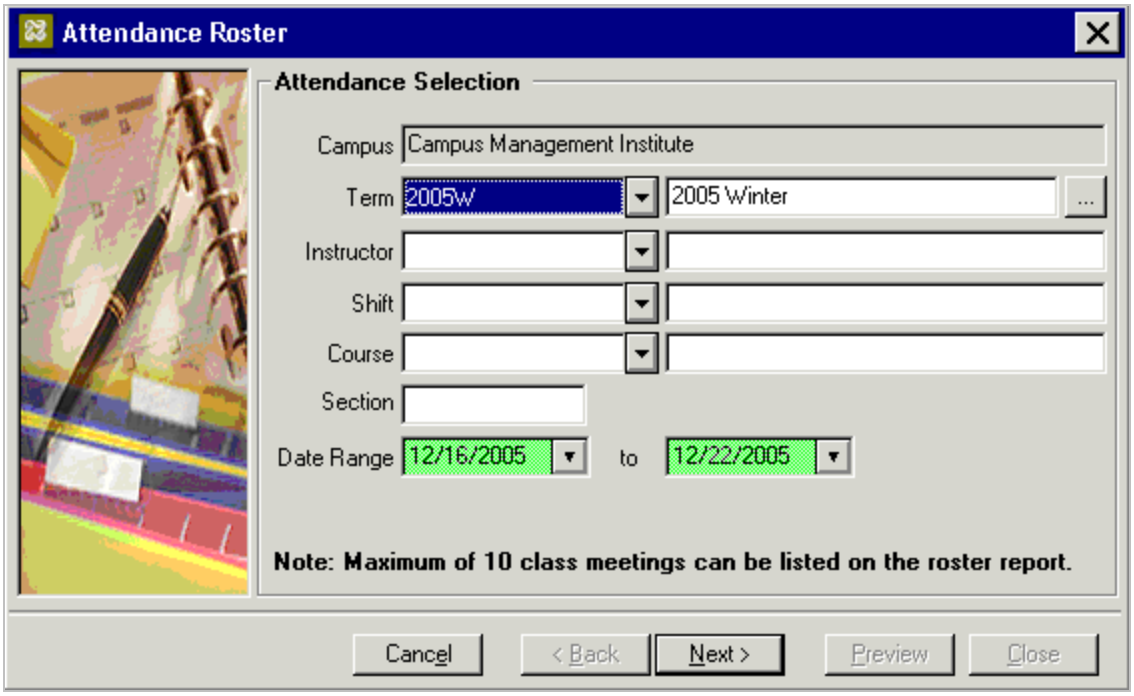
You can provide your instructors with a convenient form for taking attendance in their class sections. By using the Attendance Roster wizard, you can select a group of class sections for which to print rosters. Rosters are printed for one week at a time. For a given class section, all meetings during the week are listed on the roster. The instructor can indicate a student's attendance for each meeting of the class. (See the example report included in this topic.)

The agency sponsor code is included for each student on the attendance rosters. This information is important to list on the roster as each agency may have special requirements concerning attendance. Listing the agency code on the roster makes it easy for the instructors to identify any agency students in their class.

Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

To print Attendance Rosters for class sections:

1. Select **Daily** > **Academic Records** > **Attendance > Rosters**. The Attendance Roster wizard is displayed.



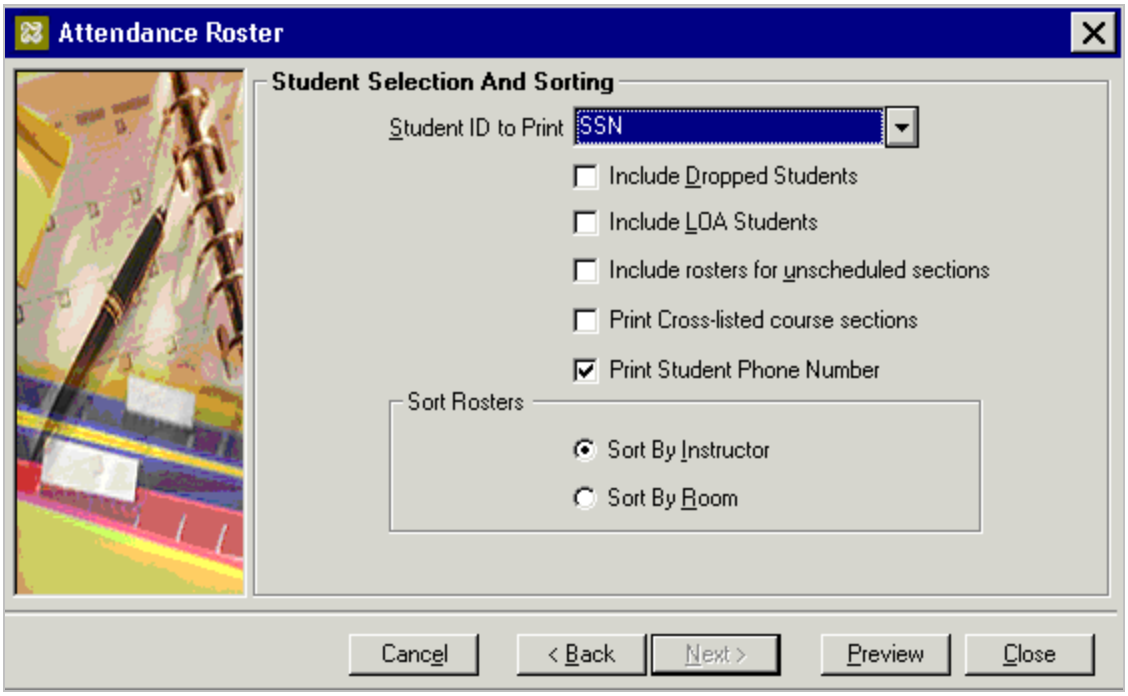
2. Select the **Term** (required). Click ... to the right of the Term field to view the Term Selection form to pick terms from a list.

   When printing rosters for a campus where the floating term flag is set to Yes, the filter on Term is replaced by a filter on class start date. Please refer to the topic on Floating Term Class Scheduling for an overall view of this feature.

   When printing rosters for floating terms, the query uses the Start Date range. For floating terms, the start date range can remain blank.

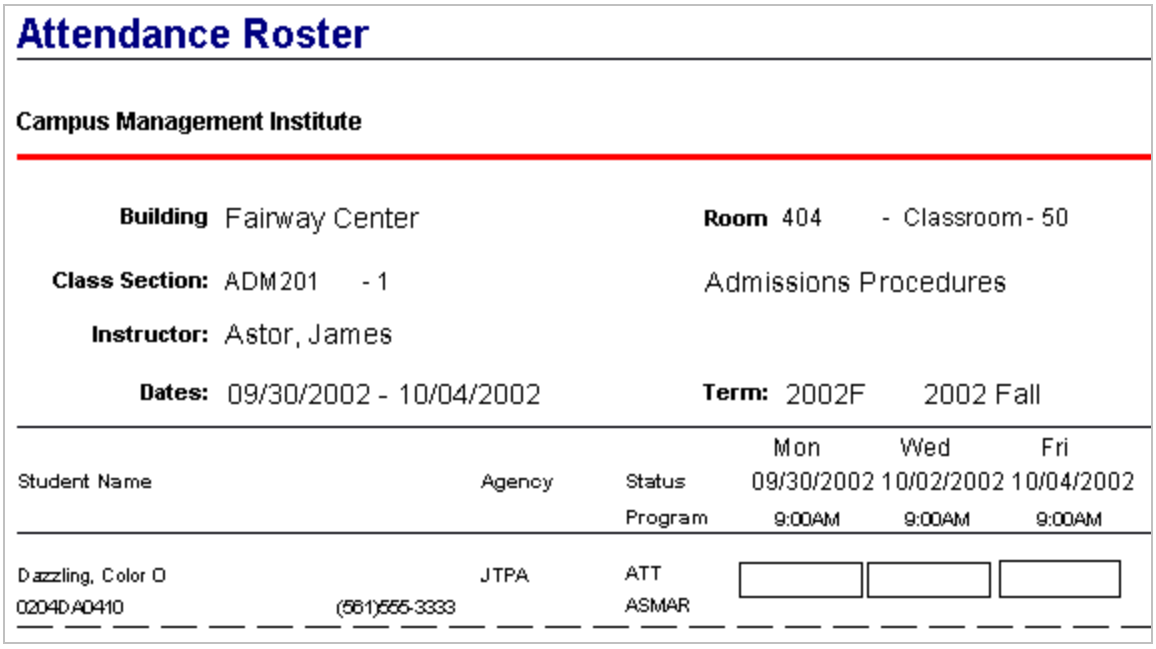
3. Select an **Instructor** (optional). If you do not select an instructor, rosters will be printed for all instructors.
4. Select a **Shift** (optional). If you do not select a shift, rosters will be printed for all shifts.
5. Select a **Course** (optional). If you do not select a course, rosters will be printed for all courses.

6. Enter a **Section Code** (optional). If you do not select a section code, rosters will be printed for all sections that are otherwise qualified for the report. **Note**: This really is the section code only, not the course code or course/section combination. If your instructors are assigned by section code, this can be a useful selection criteria.
7. Select or enter a **Date Range** (required). The date range must include no more than 10 class meetings. This is the maximum that can be printed on one row of the roster report. Remember that a class section can be scheduled to meet more than once per day.
8. Click **Next**.



9. Select the **Student ID to Print** options (SSN, Student ID, or Enrollment Number) or you select (none) to print all the students that meet the requirements of the options selected.
10. Select **Include Dropped Students** if you would like to include dropped students in the roster report, otherwise clear the option to suppress printing of the dropped students in the roster. See Drop Class Section for an explanation of this group of students.
11. Select **Include LOA Students** if you would like to include the Leave of Absence students in the roster report, otherwise clear the option to suppress them.
12. Select **Include rosters for unscheduled sections** if you would like to include the rosters for unscheduled sections in the roster report, otherwise clear the option to suppress them. See Unscheduled for an explanation of this group of students.
13. Check or clear **Print Cross-listed course sections** if you would like to print the cross-listed course sections. See Cross-listed Courses for an explanation of this group of students.
14. Check **Print Student Phone Number** if you would like the student's phone number to print on the roster otherwise deselect the option to suppress them.
15. Select a **Sort** option (required). Choose Sort by Instructor or Sort By Room.
16. Click **Finish**. The report preview will appear on your screen. A portion of an Attendance Roster is shown here,

sorted by instructor.



Attendance Roster

Campus Management Institute

Building Fairway Center **Room** 404 - Classroom - 50

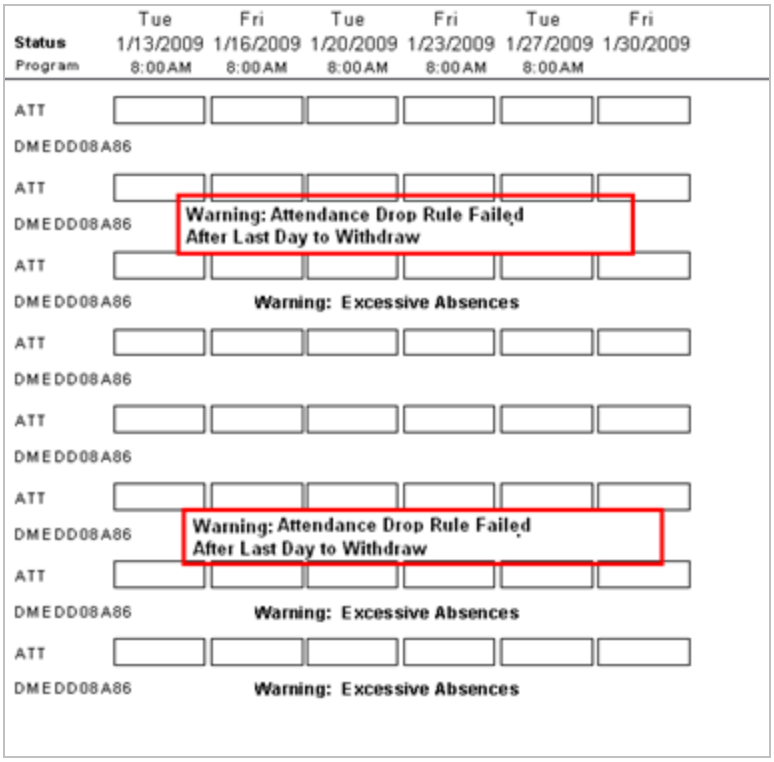
Class Section: ADM201 - 1 Admissions Procedures

Instructor: Astor, James

Dates: 09/30/2002 - 10/04/2002 **Term:** 2002F 2002 Fall

Student Name	Agency	Status / Program	Mon 09/30/2002 9:00AM	Wed 10/02/2002 9:00AM	Fri 10/04/2002 9:00AM
Dazzling, Color O	JTPA	ATT			
0204DA0410 (561)555-3333		ASMAR			

17. When posting attendance for a class section, if a course section fails the Auto Drop rule after the LDW date, and that class section has the "Drop Rule Warning When Failed After LDW" enabled, then all class roster reports will display a message alerting staff members that the Auto Drop rule failed after the LDW date.



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ATT						
DMEDD08A86	Warning: Excessive Absences					
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This warning will appear regardless of whether the class section is configured for Enforce LDW within attendance rules. If the course is not dropped because Enforce Last Day to Withdraw is selected in Attendance Rules (**Daily > Academic Records > Schedule Classes > Attendance Rules**) and it is after the LDW Date, the warning will still appear on attendance rosters.

18. View or print the rosters as required. When you close the report screen, CampusNexus Student is finished with the Attendance Roster procedure.

Record Attendance

This option provides a tool for recording daily attendance in class sections. You can choose the term, class section, and date range for which attendance is to be posted. Attendance posting is "by exception". Since the vast majority of students will be present for the full class period on any given date, the exceptions are absences and tardies. You will post the absences and tardies and the program will assume that all other students were present for the full class period.

There is an alternative menu option in CampusNexus Student from which class section attendance can be posted: Daily > Academic Records > Schedule Classes > Attendance. Both procedures are essentially the same. Attendance can also be posted for a selected student via View > Academic Records > Attendance.

Note: All available classes are displayed and can be properly recorded (before and after the change) when a section change is performed with any of the following methods:

- Student in the Portal
- Staff member in the Portal
- In CampusNexus Student

This includes classes with multiple meeting periods scheduled on the same day. Class records are available for editing, display, and reporting regardless of the student attending or not attending an available course section. All eligible classes from the original section a student transferred from remain eligible for attendance, even if attendance has already been entered for one meeting period that day.

Note: The system date and time at which the transfer section occurred governs what attendance can be entered for a student for a specified section. Attendance remains with the original section once a transfer section occurs. If a user does not desire to retain attendance records, use unregister and register rather than transfer section.

For example

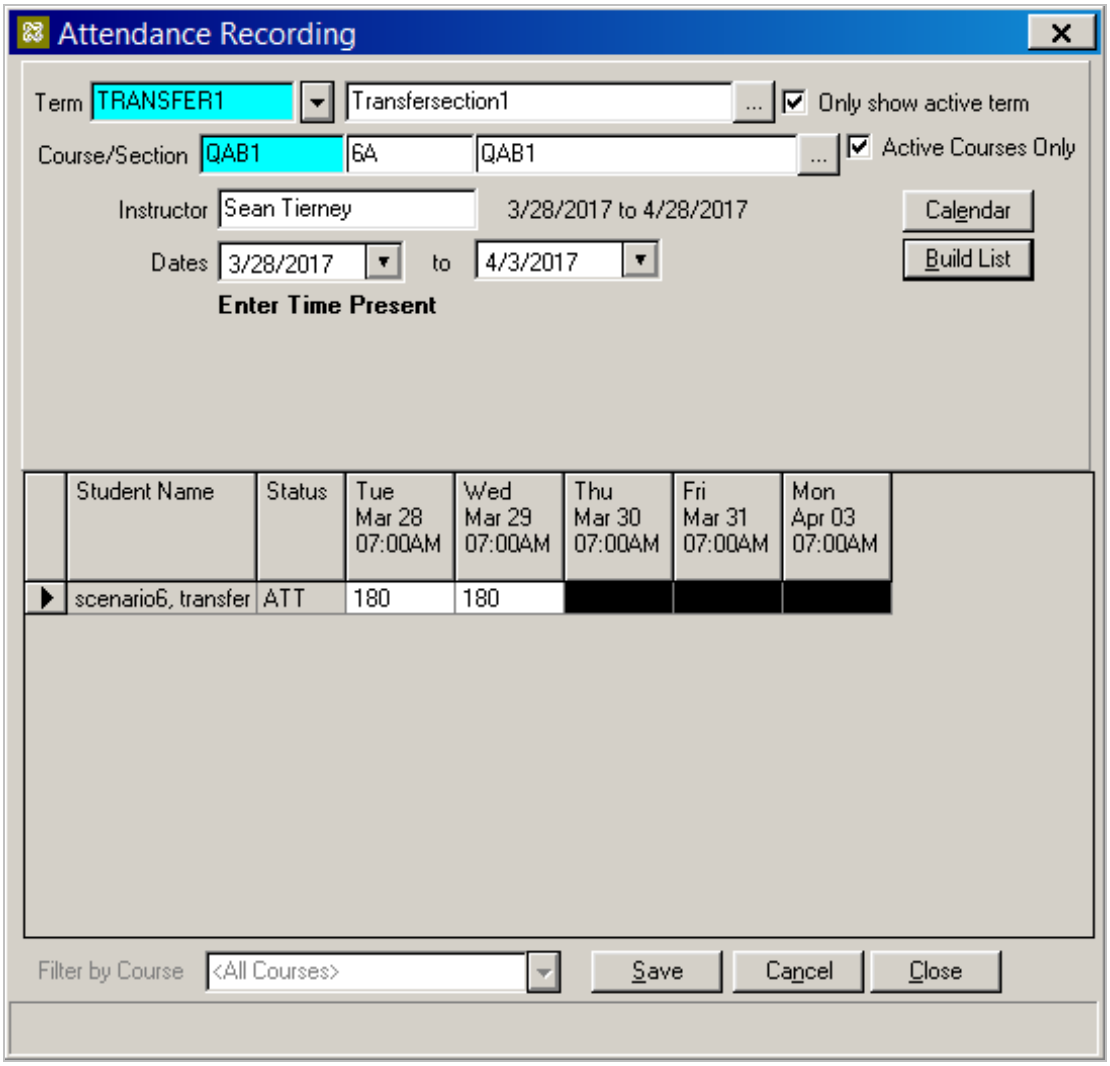
A student is registered in Section A, meeting at 7:00 a.m. for 3 hours (180 minutes) on Monday through Friday, and transfers to Section B, meeting at 2:00 p.m. for 3 hours (180 minutes) on Monday through Friday, with the transfer taking place at 12:00 p.m. on Wednesday.

The following highlighted days and times should have attendance available for entry:

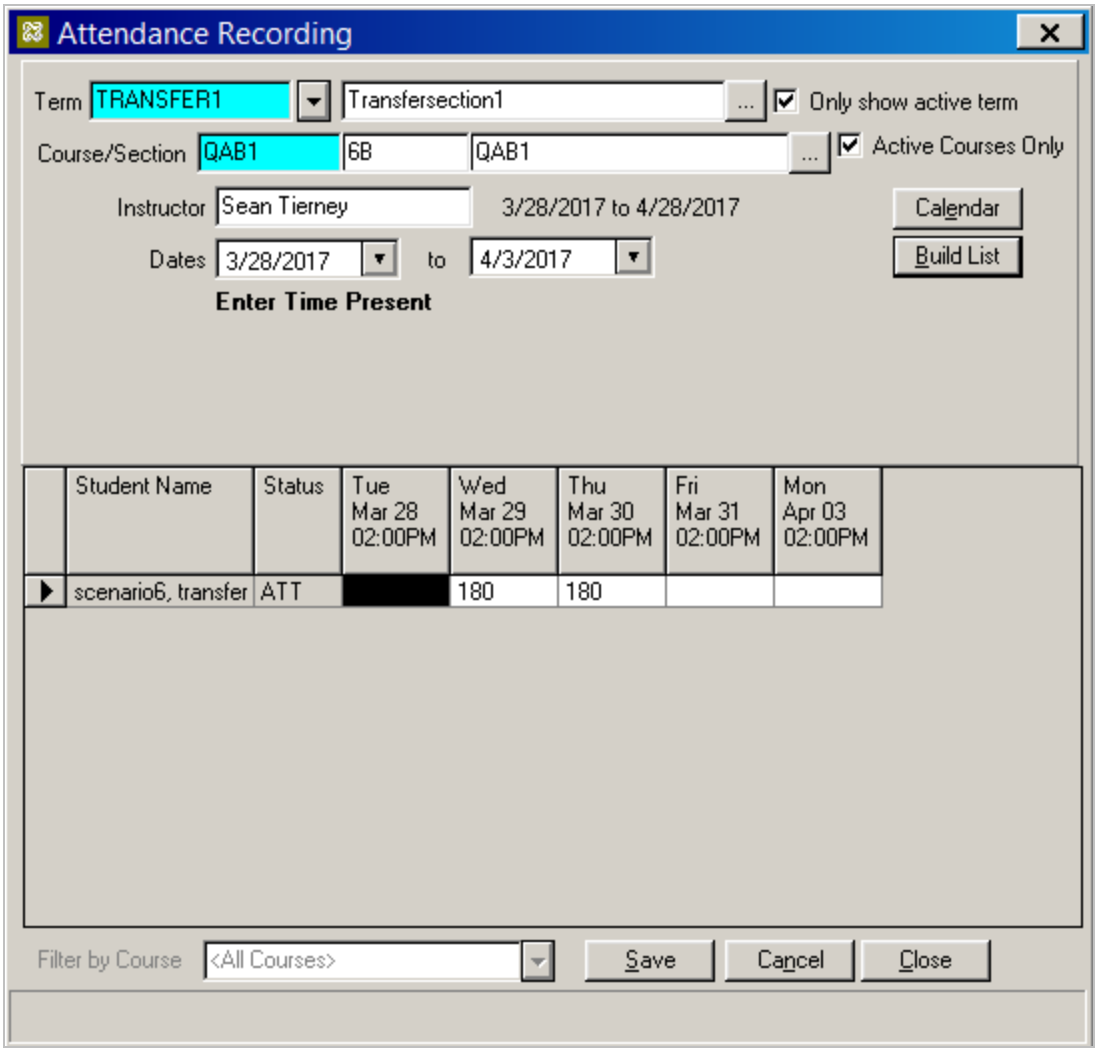
Transfer occurs at 12:00 p.m. Wednesday					
Monday	Tuesday	Wednesday	Thursday	Friday	SECTION
7:00 a.m.	7:00 a.m.	7:00 a.m.			A
		2:00 p.m.	2:00 p.m.	2:00 p.m.	B

The student will continue to show on attendance entry forms but will have the dates that are unavailable for entry blacked out in the form.

Section A Post-Transfer



Section B Post-Transfer



See "Attendance for Unscheduled Classes" for information about posting attendance for class sections with variable meeting schedules.

Note: Regardless of which method is used to post attendance, if attendance rules are configured to auto drop students based on the level of absences, then the posting of attendance may result in a student being auto dropped from a course. While dropping a course, CampusNexus Student looks at the add/drop configuration to determine if the drop occurred before or after the add/drop date for student accounting purposes.

Attendance cannot be posted for dates beyond the current system date.

Attendance for a given class section can only be recorded for dates on or between the start and end dates. They are displayed beside the Instructor's name on the form. CampusNexus Student allows you to schedule more than one meeting of a class section on the same day. Each session will be represented by a different column on the grid. A total of 10 meetings may be scheduled in the same week.

When you set up the class section, you tell CampusNexus Student how to interpret your entries. You can choose to (1) enter the time absent (in minutes), (2) enter the time present in minutes, or (3) enter a quantity of units completed by the student. A reminder of the expected entry is shown below the date range on the form. In the example, "**Enter Minutes Absent**". Note that CampusNexus Student also reminds you of the number of minutes scheduled in the lower left corner of the form (in this case, each meeting is scheduled for 60 minutes).

Best Practices Note: Users need to be aware that the selection of the **Class Meets at Various Days/Times** check box on the Class Schedule form takes precedence over any configured schedule in the system. Using this check box along with a configured schedule should be avoided as it can cause unpredictable results in attendance.

Automatic Drops and Attendance Warnings

If the class section setup indicates that a student is to be dropped from class after too many absences, the Attendance Posting routine will update the student's class status by setting it to "**D - Dropped**" when absences exceed a limit you set. This works only when adding **NEW attendance**. You can also set up a class section to trigger a warning flag when absences exceed a limit you set. The warning flag will cause a message to appear on class section rosters (**WARNING - excessive absences **).

The status of the class section on the student's schedule is changed to Dropped, and the default grade (if the campus is set up to require a default drop grade) is applied.

The attendance posting routine will set the roster flag to the appropriate value, and update the Consecutive Minutes Absent field. This will only be done when adding new attendance. Modifying previously posted attendance will have no effect on the Consecutive Minutes Absent field. If the current time attended is zero (for the attendance being recorded), CampusNexus Student will add the Minutes Absent to Consecutive Minutes Absent. If the current time attended is greater than zero (for the attendance being recorded), the program will set the Consecutive Minutes Absent to zero.

After saving the attendance for the student, the program will check the class schedule. It checks the Warning/Drop values in the following order:

1. Drop Cumulative Absent
2. Drop Consecutive Absent
3. Drop Absent Percent
4. Warning Cumulative Absent
5. Warning Consecutive Absent
6. Warning Absent Percent

As soon as one condition is met, the program stops checking the remaining conditions except in the case of when Enforce Last Day to Withdraw configuration exists.

If a student is selected to be dropped from the class, CampusNexus Student sets the Previous Status to Status and Status to "D" for the student being dropped. The program also sets the Drop Date to today's date and sets the Auto Drop Flag to 1.

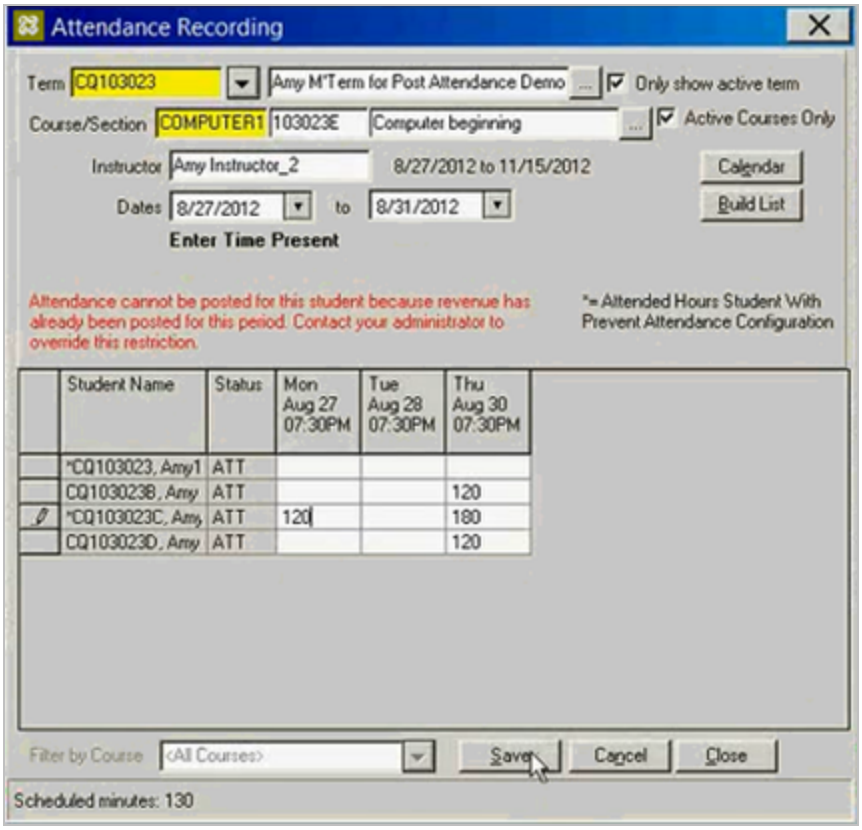
If a student is selected to be flagged for a warning, CampusNexus Student sets the Roster Flag to "W" for the student being updated.

On the Class Roster and Attendance Roster reports, if the Roster Flag is "W", the program will print "**WARNING - excessive absences **" on the roster.

If the Enforce Last Day to Withdraw feature is part of the configuration for the existing course section's campus (**Setup > Campus Locations > Edit/Add > Academic Records (tab) > General (tab)**), and LDW date is enabled for the course section, then the course section's LDW date will be validated. If the LDW date has passed, the system will not drop the course when the Auto Drop rule is failing and Enforce Last Day to Withdraw is selected on the Attendance Rules tab in the course section (**Daily > Academic Records > Schedule Classes > Attendance Rules**). The student will remain current in the course.

To record class section attendance:

1. Navigate to **Daily > Academic Records > Attendance > Record Attendance**. The Attendance Recording form is displayed.



Note: If the class meets on various days and the course type is Externship or Online, the form displayed is slightly different, and you can enter a date, length of class, and comment for each student. The attendance will be posted as type 'E' or 'O' depending on the course type.

If the class is a student specific meeting schedule, then the value entered in the Attendance Rules tab, Default duration per meeting (minutes) field will be used to represent any 'P' attendance that is posted.

2. Select a **Term** Code from the drop-down list. By default, the program will select the term you have designated in your Session Defaults. You can change the selected term code as required. When you select a term code, the program will display the description.

   The filter on Term is replaced by a filter on class start date when recording attendance for a Campus that is set up to do floating term scheduling. Please refer to the topic on Floating Term Class Scheduling for an overall view of this feature.

3. Select a **Section** from the drop-down list. (A section is designated by a course code and a section ID.) When you select a section, the program will display the description of the related course, the instructor's name, and the beginning and ending dates.

4. The program will also display a **default date range** for which attendance needs to be posted. You can change this date range as required. (This implies that you can go back, if necessary, to earlier dates to post changes to previously recorded attendance dates.) Enter the **Dates** in the date range for which attendance is to be posted. CampusNexus Student will automatically enter dates for one week after the **Last Date of Attendance**. You can change the date range to suit your need.

   CampusNexus Student will remember the date range and will update attendance for all students in the class through the end date when you save your entries. The next time you enter attendance for a class section that has

been previously updated, the program will assume that attendance has been posted for all dates previously viewed. Students will be credited with time in class up to and including the last date shown on the attendance grid.

5. Click **Build List**. CampusNexus Student will display a grid with one row for each student on the class section roster. (One extra row is displayed for technical reasons. You will not use this row.)

   Each row contains the student's status in the class and a cell for each meeting in the date range. Holidays are not displayed.

6. Enter the **time absent**, **time present**, or **units** for each date for each student.

   If a student is absent, you can type an "A" (or a). CampusNexus Student will convert your A to the number of minutes scheduled for the class. Alternatively, you can enter the number of minutes scheduled for the class.

   If a student has an excused absence, type an "E" (or e) to record an absence for the scheduled time of the class.

   To record a "tardy" in the "Time Absent" scenario, simply enter the number of minutes that the student missed. In other words, if the student is 15 minutes late to class, enter 15.

   If a student is present (in classes set up to record time present), you can type a P (or p) to record the minutes scheduled for the class. **Note that in the "time present" scenario, CampusNexus Student does not track time absent**.

   To record the number of units completed by the student (such as experiments completed, welds made, and so on), just enter the number.

   Custom Message or Default Message indicating that Permission is needed to post attendance

   This message is displayed **in red** when the user tries to enter time for 'Earn by Attended Hours' students, if the configuration is set to prevent attendance posting and permission has not been granted to the user to post attendance for the user ID and campus ID. If a custom message is not specified, the default message is displayed.

   ***Attended Hours Student with Prevent Attendance Configured**
   An asterisk next to a student's name in the Student Name column indicates that the student earns by Attended Hours and that the configuration is set to prevent attendance posting.

7. Click **Save** to save your posted attendance data.

   Note regarding attendance posting and impact on conditional courses:
   The Save functionality on the Attendance Recording form is such that the course will be dropped automatically on attendance posting if the student's absence time is greater than or equal to the time configured on the Class Schedule Attendance Rules tab.

   If this course is a prerequisite course, and if the campus is configured accordingly (see Descriptions of Fields on the SAP/Grades/Registration Tab), conditional course(s) will be automatically unregistered when this prerequisite course is automatically dropped due to attendance rules that cause the prerequisite rule to fail.

8. Click **Close** to close the form. You are returned to the Class Scheduling form.

Attendance for a selected class section can also be posted by going to Daily > Academic Records > Schedule Classes > Attendance.

Record Attendance Dates

If your school does not keep attendance records for each meeting of a class section, you can use this form to record the students' enrollment status, actual start date in the class section, and the Last Date of Attendance (LDA) in the class section. A class section appears on the list in this form if, when scheduling it, you selected an **Attendance Type of None**. The roster list can only be built if students are registered for the class section.

See Dependent and Parent Courses.

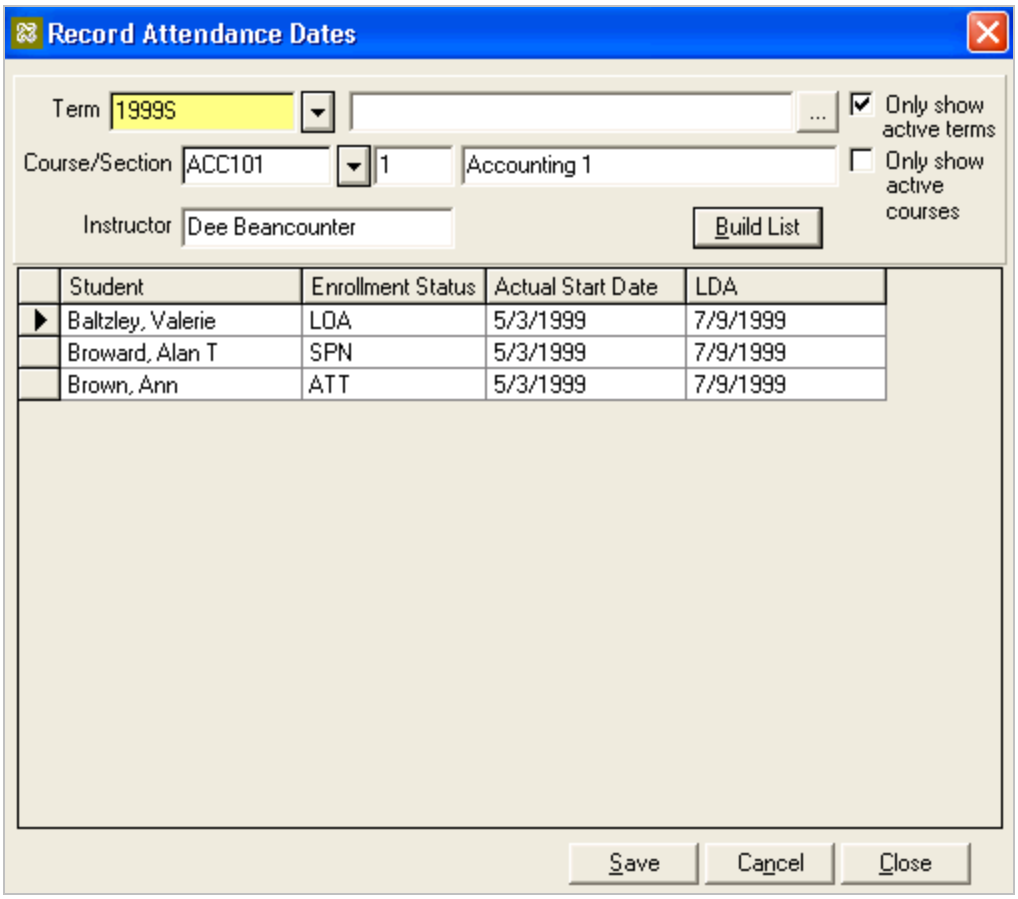
An alert message on the Record Attendance Dates form warns you if no course sections exist in the selected term that are set up with an Attendance Type of "None". When a term is selected, the course list is built by selecting all rows from the class schedule where the attendance type is "None" for the selected term. If no rows are selected, the following message is displayed: *There are no course sections on file for the selected term where the attendance type is None.* Click **OK**. Upon exiting the alert message form, the form is closed.

Course sections where the course is defined as "Dependent" are omitted from the course section list on this form.

If the "Parent" course is set up with an Attendance Type of "None", the last date of attendance will be tracked for that course only. **A separate last date of attendance for the "Dependent" course will not be tracked**.

To record attendance dates for a class section in which no regular attendance is posted:

1. Navigate to **Daily** > **Academic Records** > **Attendance** > **Record Attendance Dates**. The Record Attendance Dates form is displayed.



2. Select the **Term** for which attendance dates are to be recorded.

When recording attendance dates for a campus where the floating term flag is set to Yes, Term is replaced by Class Start Date. Please refer to the topic on Floating Term Class Scheduling for an overall vi of this feature.

3. Select a **Class Section** for which attendance dates are to be recorded. CampusNexus Student displays the course description and the instructor's name for your selected class section. You cannot change this data on this form.
4. Click**Build List**. CampusNexus Student lists the student roster grid for the class section.
5. Enter the **Enrollment Status**, **Actual Start Date**, and **LDA** for each student.
6. Click **Save**.
7. Click **Close** to close the form.

Grade Book

The Grade Book form can be used to post lessons and exam grades for a class section. If your courses are planned and set up with distinct components such as lessons, book reports, exams and so on. This is a place to track the students' progress.

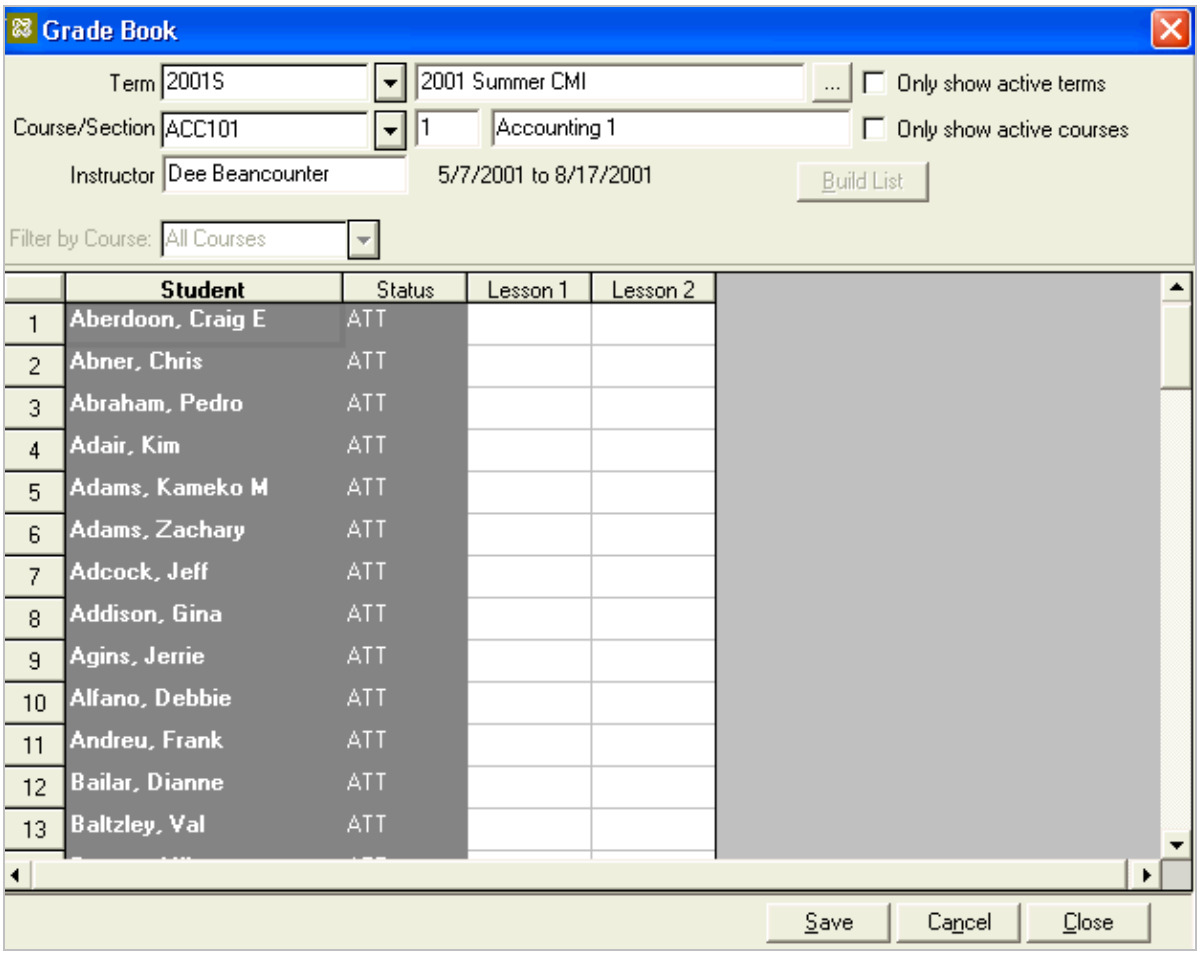
If the lessons and exams are set up with weights as a percentage of the total grade for the class section, the final grade is calculated by CampusNexus Student when the last grade is entered in the grade book. (If weight percentages are used with lessons and exams, they must add up to 100 percent.) To disable the auto calculation of the final grade, do not enter the percent of final grade when setting up the lessons for the class.

Final grades can also be posted. If you do not use percentage weights with your lessons and exams, you need to post your final grades using this option.

Note: To navigate the grade book grid, use the Arrow keys to move from one cell to another and the Enter key to edit the grade. Press the Tab key to exit from the grid.

To post lesson and exam grades using the grade book:

1. Navigate to **Daily> Academic Records > Grade Book**. The Grade Book form is displayed.



2. Select the **Term** for which lesson or exam grades are to be posted. CampusNexus Student displays the term description. You can also click ... to the right of the Term field to view the Term Selection form for easy term

selection.

For a campus where the floating term flag is set to Yes, Term are replaced by Class Start Date when entering lesson scores in the Grade Book. Refer to Floating Term Class Scheduling for an overall view of this feature.

3. Select the **Class Section** for which lesson or exam grades are to be posted. CampusNexus Student displays the class section description, Instructor name, and begin/end dates.
4. Click **Build List**. CampusNexus Student displays the lessons and exams as column headers and students as row headers. All previously posted grades are displayed.
5. Enter your grades for lessons and exams by clicking a cell and typing the grade. You can navigate around the cells by using the arrow keys on your keyboard or by clicking each cell with the mouse. Unlike spreadsheets in Microsoft Excel, pressing the Enter key after typing a grade does not move the cursor to the next cell.

   Double-click a row to display the Student Master form.
6. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

   Note: Upon saving Final Grades, CampusNexus Student evaluates if a prerequisite rule failed due to grade posting or credits/hours. If the campus is configured to do so, conditional course(s) are automatically unregistered if the prerequisite rule fails. The reason for the automatic unregistration is populated as configured at the campus level.

Note: The Grade Book form has security based on staff groups configured under Setup > Security. The security settings control the permissions to view, post, and modify Letter Grades and Numerical Grades.

The following permissions are available for staff groups:

- Display - Allows staff to view students on the form with and without grades.
- Add - Allows staff to post grades for students (who don't already have a grade posted).
- Edit - Allows staff to change grades that have already been posted.
- Delete - Allows staff to remove a previously posted grade.

Midterm Grades

You can post Midterm grades for a student through Midterm Grade Recording form (from the Daily menu).

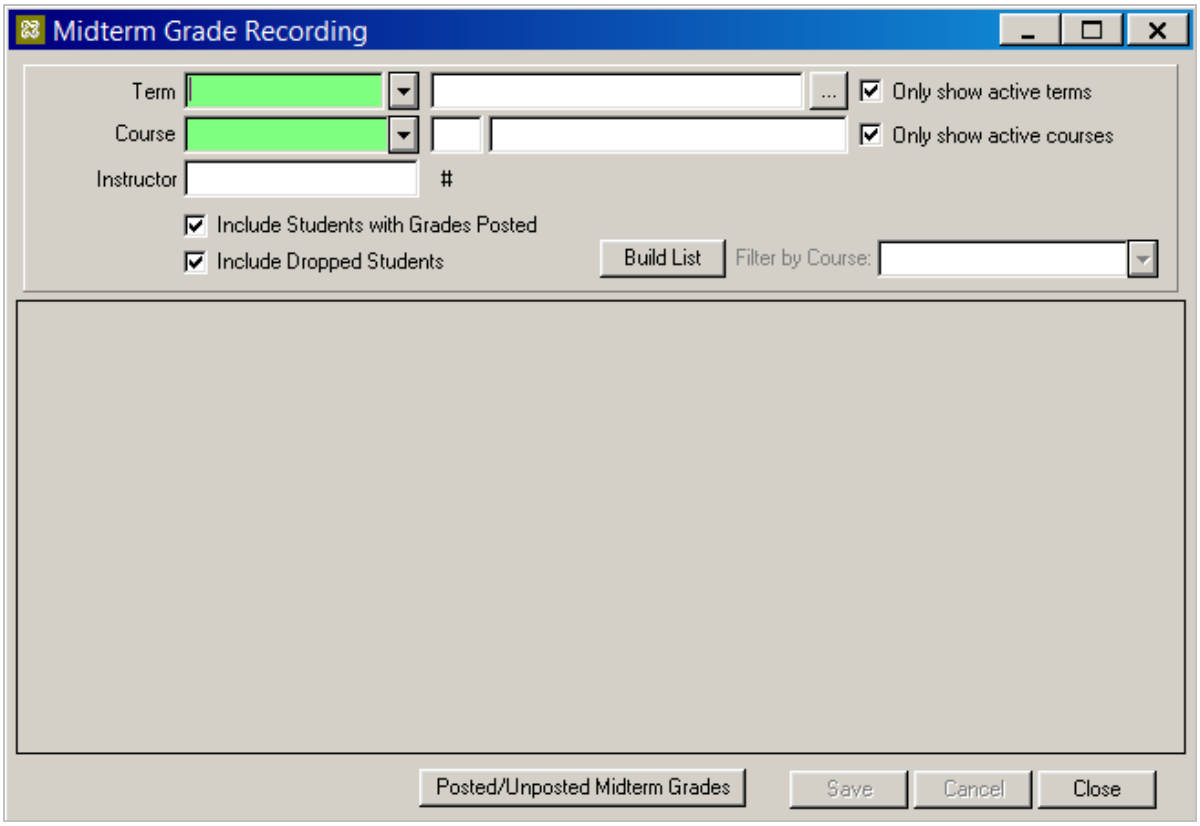
You can view this form only if you select **Yes** in the **Post Independent Mid Term Grade** option on the Campus Information form. For more details see Campus Academic Records. See also Final Grades.

Note: The Midterm Grades form has security based on staff groups configured under Setup > Security. The following permissions are available for staff groups:

- **Display** - Allows staff to view students on the form with and without grades.
- **Add** - Allows staff to post grades for students (who don't already have a grade posted).
- **Edit** - Allows staff to make changes to grades that have already been posted.
- **Delete** -Allows staff to remove a previously posted grade.

To post Midterm grades:

1. Navigate to **Daily >Academic Records > Midterm Grade**. The Midterm Grade Recording form is displayed.



2. Enter data in the following fields:

   Term: Select the **Only show active terms** check box to display active terms in the **Term** list box.

   Course: Select the **Only show active courses** check box to display active courses in the **Course** list box.

   Instructor: Enter the name of the Instructor for the course.

3. Select the student from the **Student Name** list and post Numeric and Letter grades for the students in the **Numeric**

Grade and **Letter Grade** columns respectively.

Note: If the selected course was taken by the student as an Audit, the only Midterm grade that is assignable to the student is **AU**.

4. Click the **Posted/Unposted Midterm Grades** button. This opens the Report Selection form. You can view the number of posted and unposted Midterm grades for a particular course.
5. Select **Yes**, **No**, or **Both** from the **Grade Posted** list box to view posted/unposted grades or both types of grades.
6. Click **Preview** to view the Posted/Unposted Midterm Grades report.

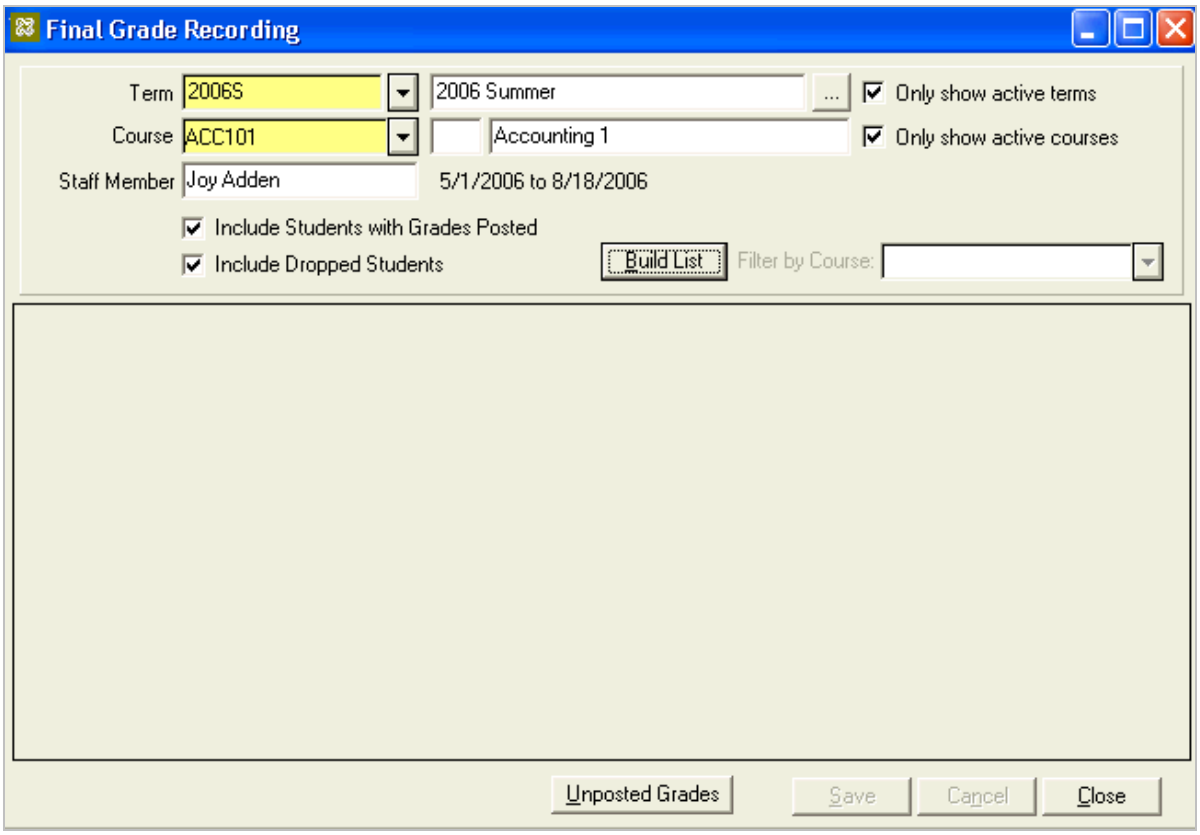
Final Grades

Final grades for class sections are "batch posted" from Daily > Academic Records. Alternatively, final grades for an individual student can be posted by using the option at View > Academic Records > Final Grades.

Note: Another tool for posting final grades is the Grade Book (Daily > Academic Records > Grade Book). Although the Grade Book is used primarily for posting lesson and exam grades for class sections, it also calculates a final grade if the lesson and exam grades are weighted as a percentage of the final grade. If percentages are used with lessons and exams, they add up to 100 percent. CampusNexus Student calculates the final grade when the last lesson or exam grade is posted.

To post final grades for a class section:

1. Navigate to **Daily** > **Academic Records** > **Final Grades**. The Final Grade Recording form is displayed.

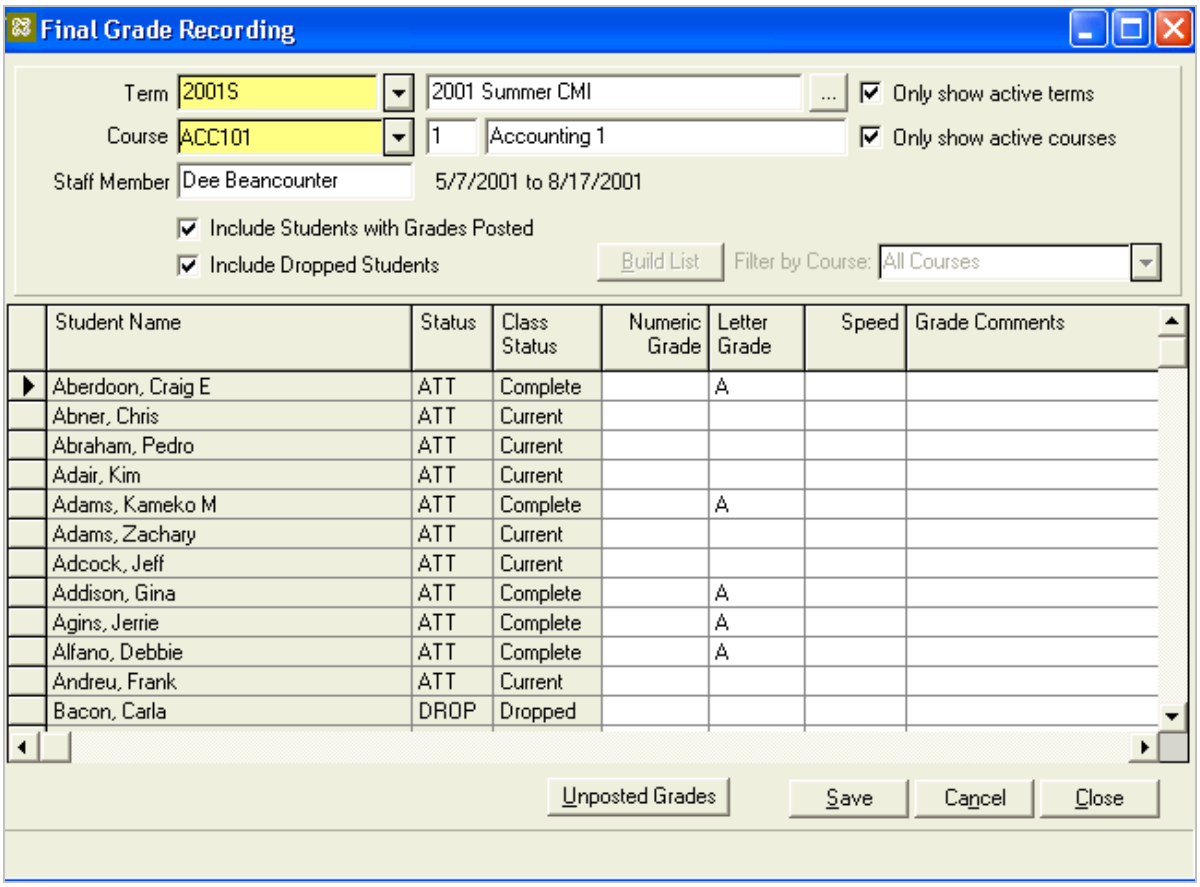


Note: Size the Student Name column (and other columns) to see the full name of students with long names. When you open the form again, the size of the column you set is retained. To "size" a grid column on this form, put your mouse pointer on the vertical line between the column headers. The pointer changes to a double-headed arrow with a vertical line between the arrowheads. Drag the line between the column headers to change the width of the column.

2. Select the **Term** for which grades are to be posted. The default term comes from your Session Defaults. CampusNexus Student displays the term description.

   For a campus where the floating term flag is set to Yes, Term is replaced by Class Start Date when recording final grades. Refer to the topic on Floating Term Class Scheduling for an overall view of this feature.

3. Select the **Class Section** for which grades are to be posted. CampusNexus Student displays the class section description, instructor name, and beginning and ending dates.
4. To include students whose final grade have already been posted, select **Include Students with Grades Posted**. The default is to show all students. Clear the check box to see only students who have not had grades posted.
5. Click **Build List**. CampusNexus Student builds a grid using the class roster. The grid shows the Student Name, Numeric Grade, Letter Grade, Speed, and Grade Comments.



- **Student Name**. The list of students depends on your choice to list all students or only those that do not have grades posted.

  Note: If Blind Grading is required for the section being displayed, the student's name is replaced with the Blind Grade IDs.

- **Numeric Grade**. Shows the numeric grade given to the student whose name appears on the row. If your school does not award numeric grades, leave this cell blank.
- **Letter Grade**. Shows the letter grade given to the student whose name appears on the row. If a numeric grade has been entered, it is converted to a letter grade according to the grading scale associated with the student's program version. If numeric grades are not used, you can select a grade from the list that is displayed when you enter the letter grade cell. Otherwise, you can type the student's grade in the cell. Grades you type in the cells are validated in the program version grading scale that applies to the student. If the let-

ter grade for the grade scale has been assigned a pass/fail designation (i.e., P and F), these letter grades are the only letter grades that appear in the drop-down list.

The grade information from dropped courses is included when calculating the student's GPA.

Note: Since grades depend on the grading scale associated with the student's program version, it is possible that two students with the same numeric grade will receive a different letter grade.

- **Speed**. This field is used to record such data as typing speed or other "rating" values. It is a numeric field in which you can record anything you like.
- **Grade Comments**. Use this cell to record instructor comments or other information regarding a student's grade. **These comments will be printed on the student's transcript.**

6. Enter the **Numeric Grade** and or **Letter Grade** for each student on the roster. Letter grades will be converted to upper case during data entry. The grades can then be properly validated in the Letter Grade table. It is not necessary to enter grades for all students in the same session. It is possible to close the grading form and come back at a later date with more grades or with changes. If you do not enter numeric grades, you can select the letter grade from the list box that is displayed when the insertion point is in a letter grade cell.

   Note: The Final Grades form has security based on staff groups configured under Setup > Security. The security controls allow for the ability to view, post, and modify both Letter Grades and Numerical Grades. The following permissions are available for staff groups:

   - Display - Allows staff to view students on the form with and without grades.
   - Add - Allows staff to post grades for students (who don't already have a grade posted).
   - Edit - Allows staff to make changes to grades that have already been posted.
   - Delete - Allows staff to remove a previously posted grade.

7. Enter Speed if this value is appropriate for the class. See the description of speed presented previously in this topic.
8. Enter Grade Comments as needed. These comments will be printed on the student's transcript.
9. At any time while you are entering grades, click Save to save your entries. Be sure to click Save when you are finished entering data.

   Note: Upon saving Final Grades, CampusNexus Student evaluates if a prerequisite rule failed due to grade posting or credits/hours. If the campus is configured to do so, conditional course(s) will be automatically unregistered if the prerequisite rule fails. The reason for the automatic unregistration is populated as configured at the campus level.

10. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

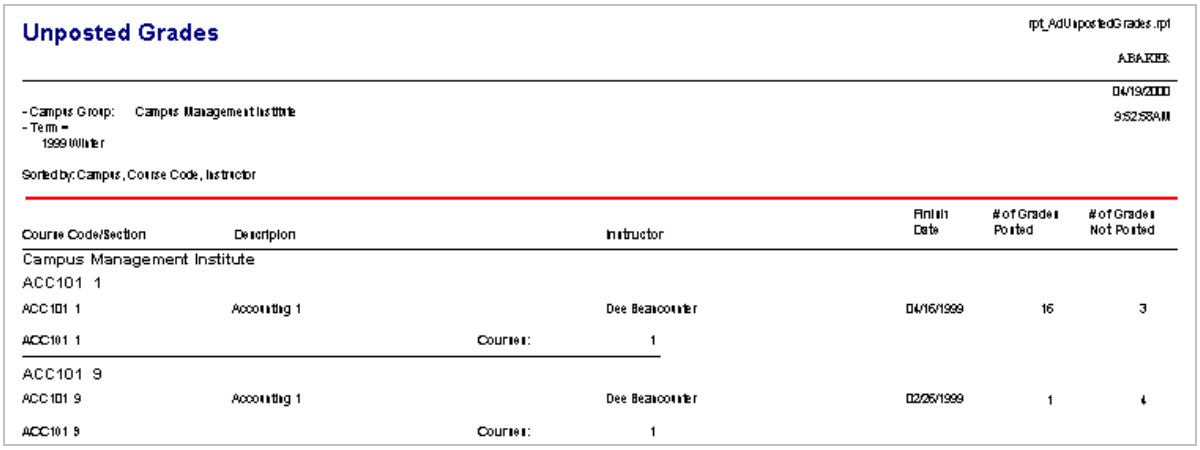
The Date Grade Posted field is included with Final Grades for students. This date indicates the actual system date that the grade letter was recorded on the system. This date is used to produce daily grade reports.

The Date Completed field is updated with the End Date of the course.

Note: If a student drops and then reinstates a course, the previous **Date Completed** and **Date Grade Posted** fields are automatically cleared by CampusNexus Student, allowing the new dates to be entered.

Unposted Grades Report

This form enables you to view or print a report of grades posted and unposted. When you click **Unposted Grades**, the Report Selection form is displayed. Select campus group, term, records posted, and records not posted. You can sort by campus, course code, and instructor.



Unposted Grades

rpt_AdUnpostedGrades.rpt

ABAKER

04/19/2000

9:52:58AM

- Campus Group: Campus Management Institute
- Term =
  1999 Winter

Sorted by: Campus, Course Code, Instructor

Course Code/Section	Description		Instructor	Finish Date	# of Grades Posted	# of Grades Not Posted
Campus Management Institute						
ACC101 1						
ACC101 1	Accounting 1		Dee Beancounter	04/16/1999	16	3
ACC101 1		Courses:	1			
ACC101 9						
ACC101 9	Accounting 1		Dee Beancounter	02/26/1999	1	4
ACC101 9		Courses:	1			

If the current campus has the floating term flag set to Yes, the class start date filter is used for listing courses when the Unposted Grades button is clicked on the Final Grades form (frmAdFinalGrades). This option produces a report showing class sections that have not yet had final grades posted. If the campus is set up to do floating term scheduling, the query for this report filters against the start date criteria instead of a term. Refer to Floating Term Class Scheduling for an overall view of this feature.

Grading and Retakes

CampusNexus Student stores the Student Overall GPA in the Enroll Term table for each term when the GPA is calculated for the term.

If a program version is shared across multiple campuses and the campuses have different retake methodologies, the grade scale that the program version is attached to must have its retake methodology set to 0 - Use Retake Method on Campus setup.

Grade Scale Code Setup

From the Grade Scale Code Setup popup screen that is displayed when adding or editing grade scale codes, you can select a Retake Methodology. The choices appear below:

- 0 - Use Retake Method on Campus Setup.
- 1 - Use Highest
- 2 - Use Most Recent
- 3 - Include All
- 4 - Average Retakes

When adding a new grade scale, the program defaults to 0 - Use Retake Method on Campus Setup. For more information, see Lists Menu > Academic Records Lists > Grade Scale > Grade Scale Codes.

Grade Scales for Program Versions

When the grade scale for a program version is changed and saved, the program checks for any students who are currently enrolled in the specified program version. If any students are found, a message is displayed.

A Degree Seeking student is considered to be currently enrolled if the student's status category is E - Enrolled, A - Active, or T - Temporary Out. For Non-Degree Seeking students currently enrolled, the status categories are X - Enrolled and Y - Active.

If the user selects Yes, the system updates the enrollment grade scale for each of the enrolled students with the new grade scale specified for the program version.

If the user selects No, the enrolled students continue to have the old grade scale attached to their records.

For more information, see Lists Menu > Academic Records Lists > Programs > Program Versions.

Course Retake Override

In cases where courses in your catalog can be repeated many times to satisfy a degree requirement without being considered a "retaken" course, CampusNexus Student provides the functionality to override the retake methodology. In other cases, courses may need to be retaken to improve a grade. In such cases, CampusNexus Student also can be configured to ignore the retake override for the course when it is added back to the student's schedule.

You can configure the system to:

- Flag courses that should not be considered retakes.
- Tell which repeated courses are not considered retakes when looking at the final grades for a student.
- Designate that the retake override should be ignored when adding a class to a student's schedule.
- Specify whether the courses will be included or excluded in the retake methodology in the student's GPA calculation.

Registration for Courses with Retake Override Configured

View > Academic Records > Schedule > Register

If the course for which the student is being registered has the Retake Override flag set to yes and there is at least one final grade or currently scheduled course in the student's file for the selected course or an equivalent course, a form displays asking "Will this course be considered as a retake?" The default is set to No.

The scenarios outlined below should be considered:

- Scenario 1: If there are no retaken courses or equivalents for the registered course, and if the answer to the Question is "No", then the grid is unavailable. Move to the next screen in the wizard.
- Scenario 2: If there is one retaken course or equivalent for the registered course, and if the answer to the Question is "Yes", then the grid is unavailable. Move to the next screen in the wizard.
- Scenario 3: If there are multiple retaken courses or equivalents for the registered course, and if the answer to the Question is "Yes", then the grid is available. Select a course and move to the next screen in the wizard.

The message to select the course that is being retaken is only displayed after you select Yes to the question "Will this course be considered as a retake?" and there is more than one course listed in the grid.

Highlight the course that is being retaken. There is a "Cancel" and a "Next" button on this form as it is part of the registration wizard. If you click Next, a course in the grid must be selected so that when the update to the enrollment schedule occurs, the program will know which course is being retaken and correctly update the Retake Override indicator on that row. Clicking the Next button will take you into what was previously the first form in this wizard. All functionality from that point on will remain unchanged.

When the Finish button is clicked on the final form in the wizard, the program will update the Retake Override column for the registered course and if applicable the course being retaken.

The following scenarios are addressed in regards to updating the Retake Override column:

- If the Retake Override flag for the course being registered is off, the program will turn off the Retake Override flag for the course being registered.
- If no existing posted grades or current scheduled courses are on file for the registered course or any of its course equivalents, then the program will update the Retake Override flag with the Retake Override flag for the course being registered.
- If existing posted grades or currently scheduled courses rows are on file for the registered course, and you answered No to the "Will the course being registered for be considered as a retake?" question, then the program will turn on the Retake Override flag for the registered course.
- If existing posted grades or currently scheduled courses rows are on file for the registered course, and you answered Yes to the "Will the course being registered for be considered as a retake?" question, then the program will turn off the Retake Override flag for the registered course and turn off the Retake Override flag for the course selected as being retaken on the Retaken Courses form.

View > Academic Records > Final Grades

The Retake Override prompt is displayed on this form only if the course highlighted in the grid has it's Retake Override flag set to Yes.

The Yes or No value on the new Retake form in the Registration Wizard will be set according to the Retake Override value on the grade record for the row highlighted in the grid. If the grade record Retake Override is true, the Yes button will be selected. If the grade record Retake Override is false, then the No button will be selected. This new field will be editable if it is visible and you click the Edit button on the form.

Reports > Academic Records > Transcripts

The program lists a notation next to a final grade where the retake override flag is set. Example: If the Retake Override indicator is on, then "R*" would be listed next to the grade. The transcript is the only report where existing logic generates output that identifies a course as being a Retake. Therefore, this is the only report modified to identify courses where the Retake Override flag is

set. "R*" is listed next to the course description and R* as a footnote at the bottom of the report states that it represents a "Retake Override".

Retakes in Non-Term

Retake course work for enrollments associated with program versions configured to use Academic Calendar 5 or 6 directly affects progression as it is measured in the Student Pace Evaluation (SPE). A course that is being retaken for a passing grade progresses the student, however course work that is being retaken for a better grade (previously passed) does not progress the student.

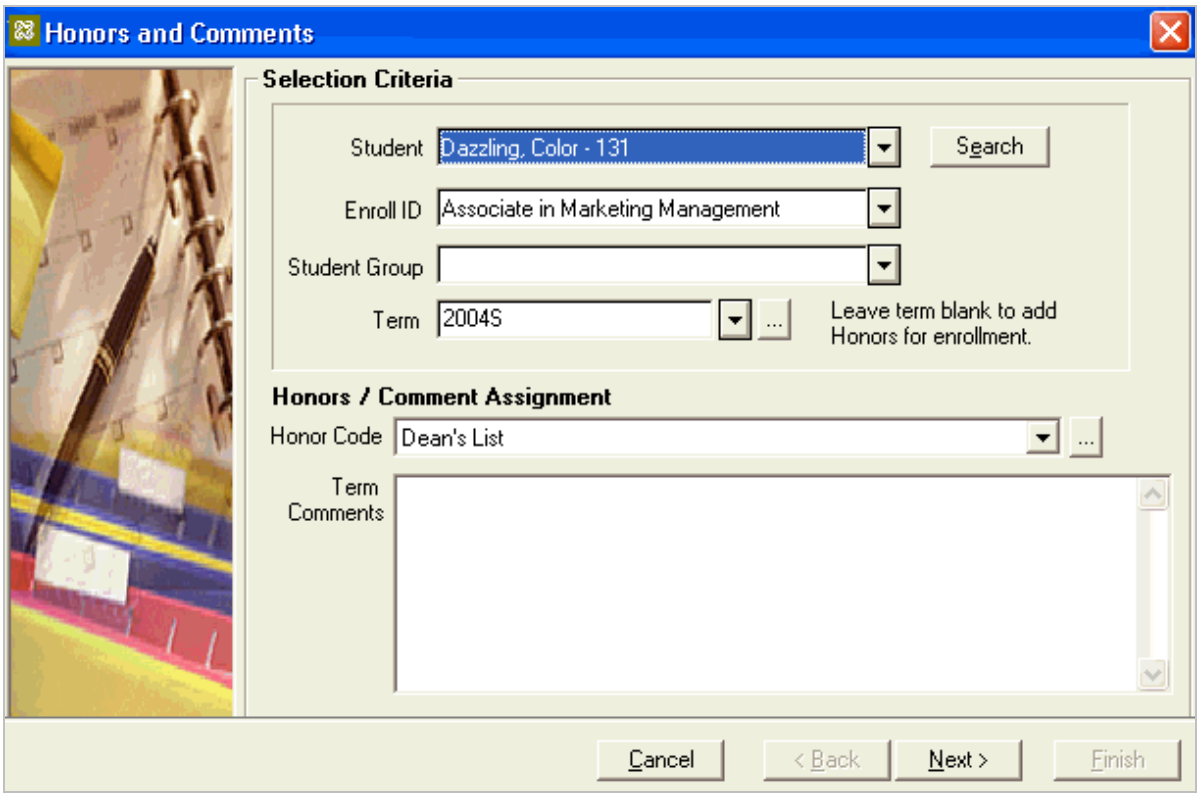
Honors and Comments

This option is used to assign honors to a student or group of students. You can select the student or group of students, the term, and the honor to be awarded. The Term Summary Information (View > Academic Records > Enrollment > Term Summary) will be updated for each student selected.

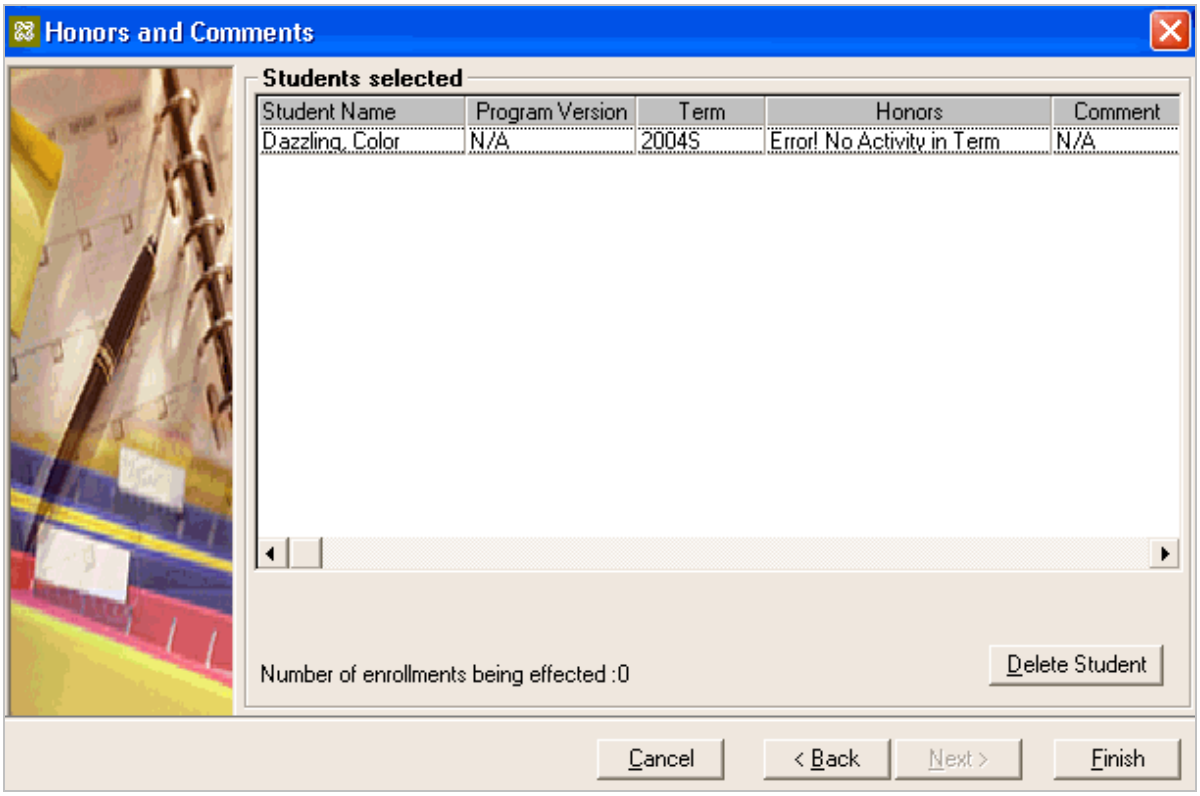
If you are assigning honors to a student group, be sure to update the list of students in the group before executing this procedure.

To post Honors and Comments:

1. Navigate to **Daily > Academic Records** > **Honors and Comments**. The Honors and Comments wizard is displayed.



2. Select the Student or Student Group to whom honors are being assigned. If necessary, click **Search** to find a student. If you use the search tool, the selected student's name will be inserted in the Student field.
3. Click **Next**.



4. Review the list of students. If necessary, select one or more students and click **Delete Student**.
5. Click **Finish** to process the assignment of honors to the selected students and close the form.

Configuring Online Registration

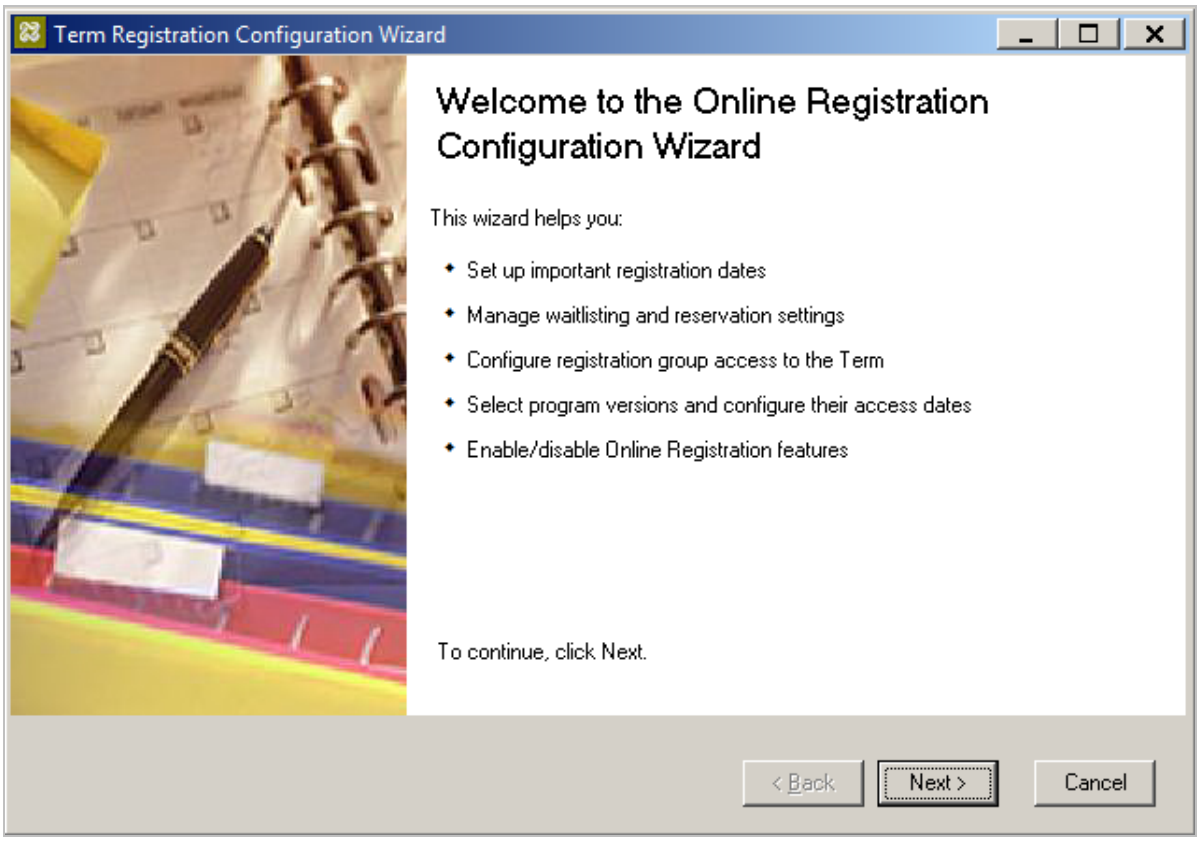
The Online Registration Configuration wizard is available if the Use Portal? option is enabled for the campus.

A student may be enrolled in a term/program version that allows the student to register outside the student's current program. The program version is checked to allow outside registration. The student will see a list of all courses available for the term. If the student registers for a course that is included in the student's present schedule or not, an audit entry is made to the Course Status Change and Academic Records audit folders.

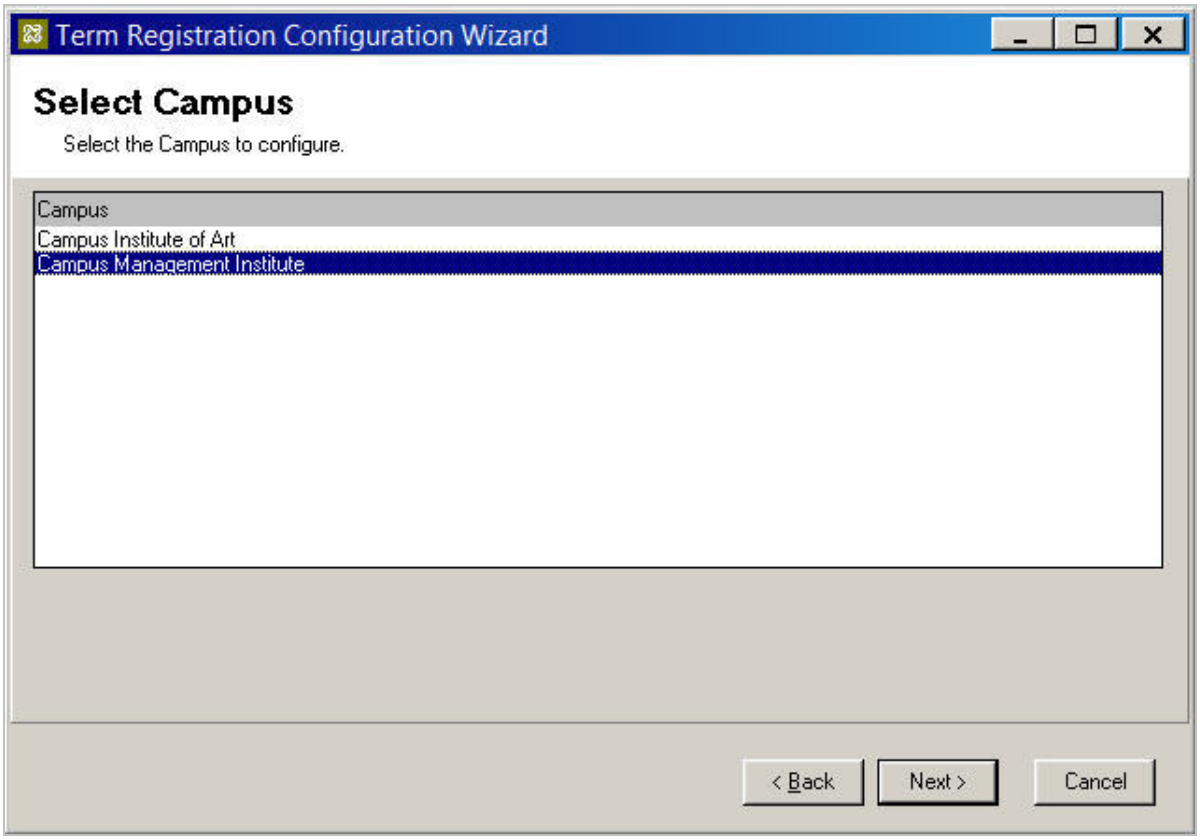
Note: The Registration Start and End dates, Add End Date, and Drop End Date are based on parent term settings, if configured, when a campus uses term relationships. If the parent term settings are not configured when a campus uses term relationships, the child term settings are used during Online Registration through Portal.

To set up the Online Registration Configuration:

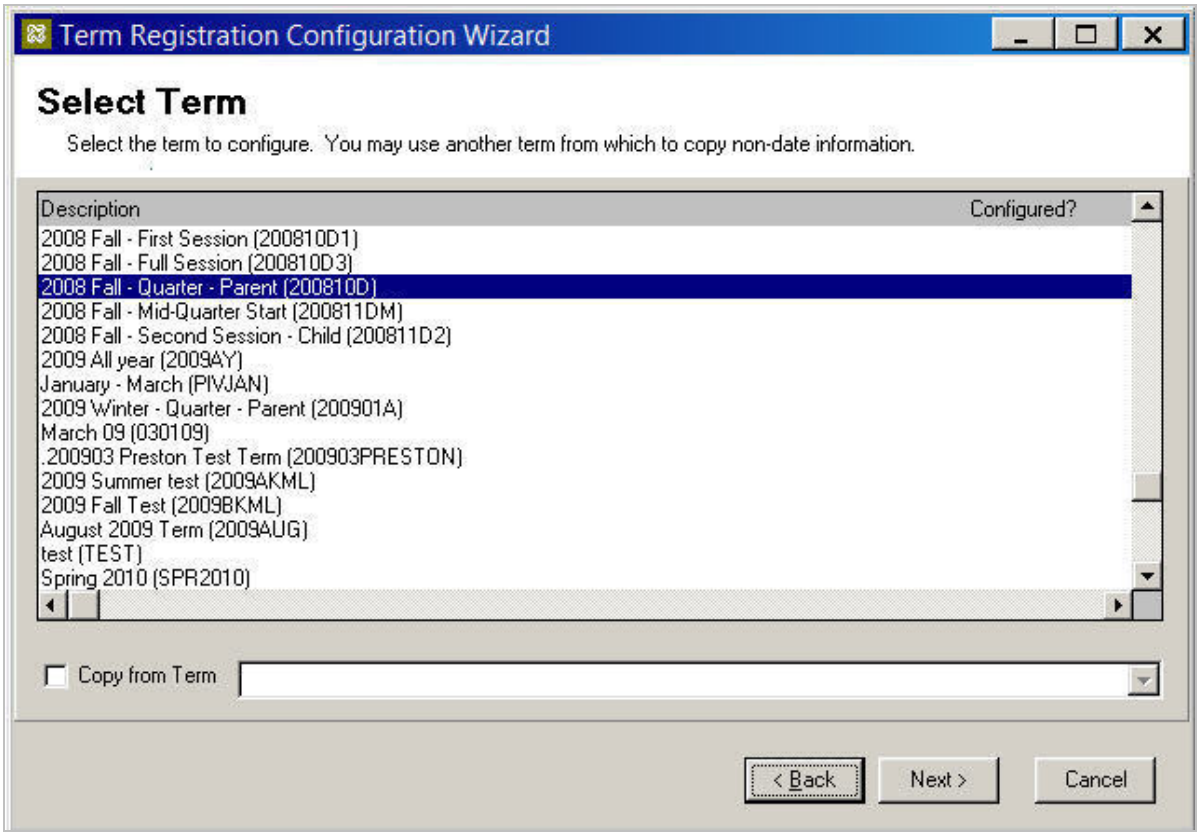
1. Navigate to **Daily > Academic Records > Online Registration Configuration**. The Term Registration Configuration Wizard is displayed.



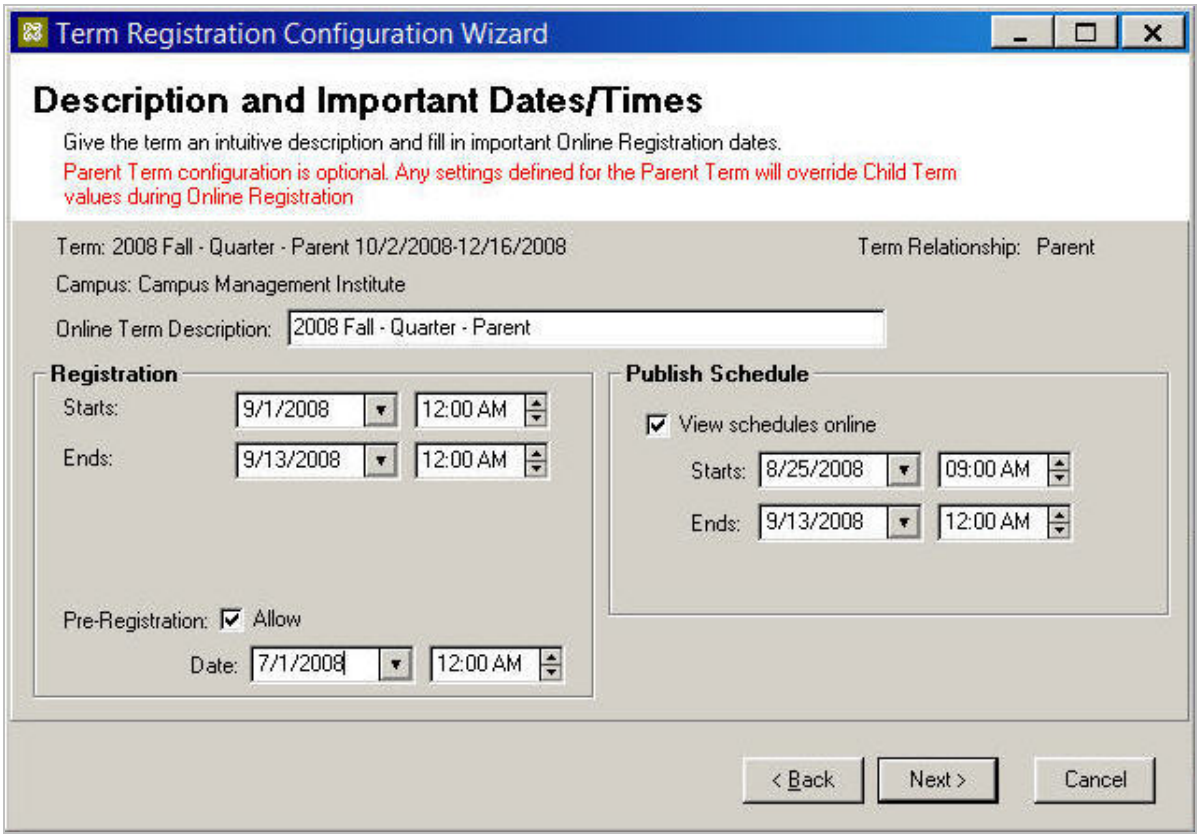
2. Click the **Next**. The Select Campus form is displayed.



3. Select a **Campus** and click **Next**. The Select Term form is displayed.



4. Select a **Term** and click **Next**. The Description and Important Dates/Times form is displayed.



If a campus uses term relationships and a Parent Term or Child Term is selected, the 'Term Relationship:' label is displayed with the value 'Parent' or 'Child'. If a campus does not use term relationships, the term relationship label is not displayed.

5. Specify dates and times for the selected term in the Registration **Starts** and **Ends** fields.

   The Add End Date and Drop End Date fields become enabled if the selected term is not a child term. Enter the dates and times. The add and drop dates must fall between the Registration Start and Term end dates.

   Note: When the add/drop campus level 'Add/Drop Flag' configuration is set to 'S - Course Section Enforced', the 'Add End Date' and 'Drop End Date' fields are disabled since Portal uses the dates configured at the Course Section level for the add/drop enforcement.

6. Select the **View schedules online** check box and specify dates and times in the **Publish ScheduleStarts** and **Ends** fields.

7. Select the Pre-Registration **Allow** check box and specify the **Date** and **Time**.

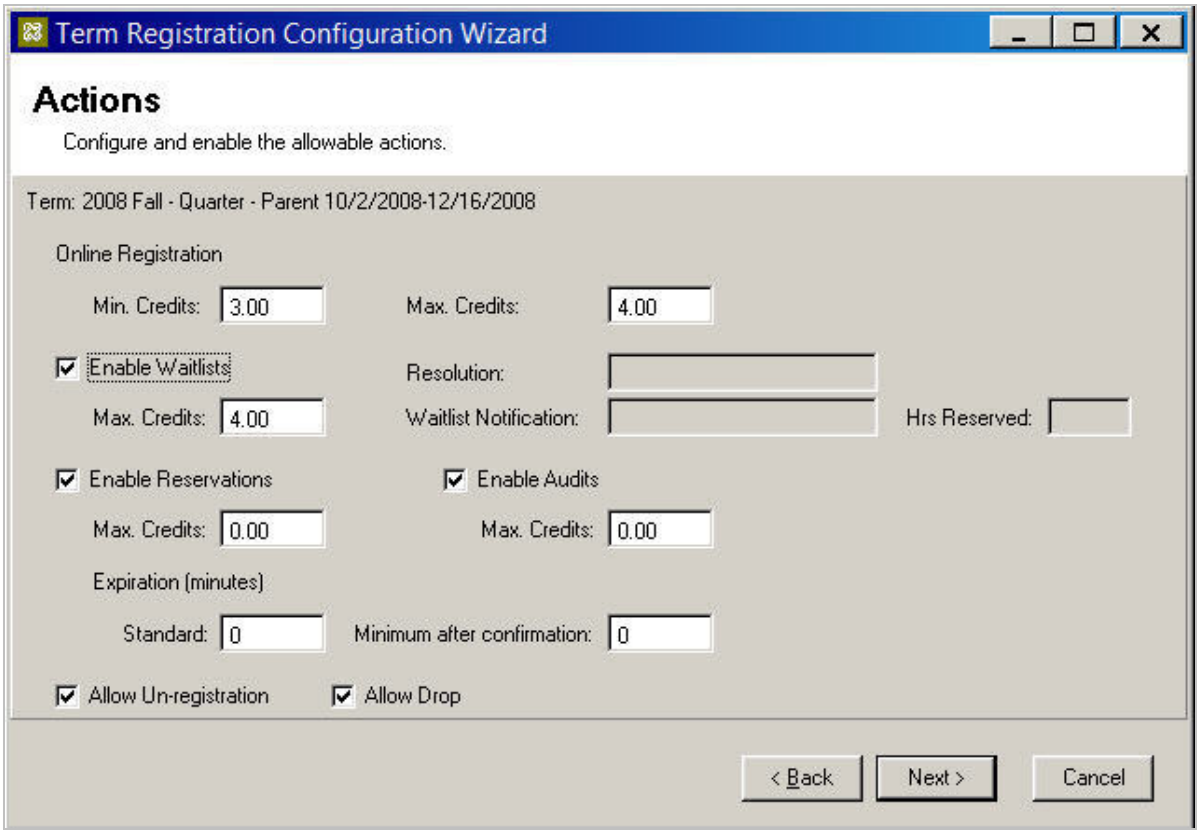
   Note: The pre-registration date must be before the registration start date.

8. Click **Next**. The Registration Groups form is displayed.

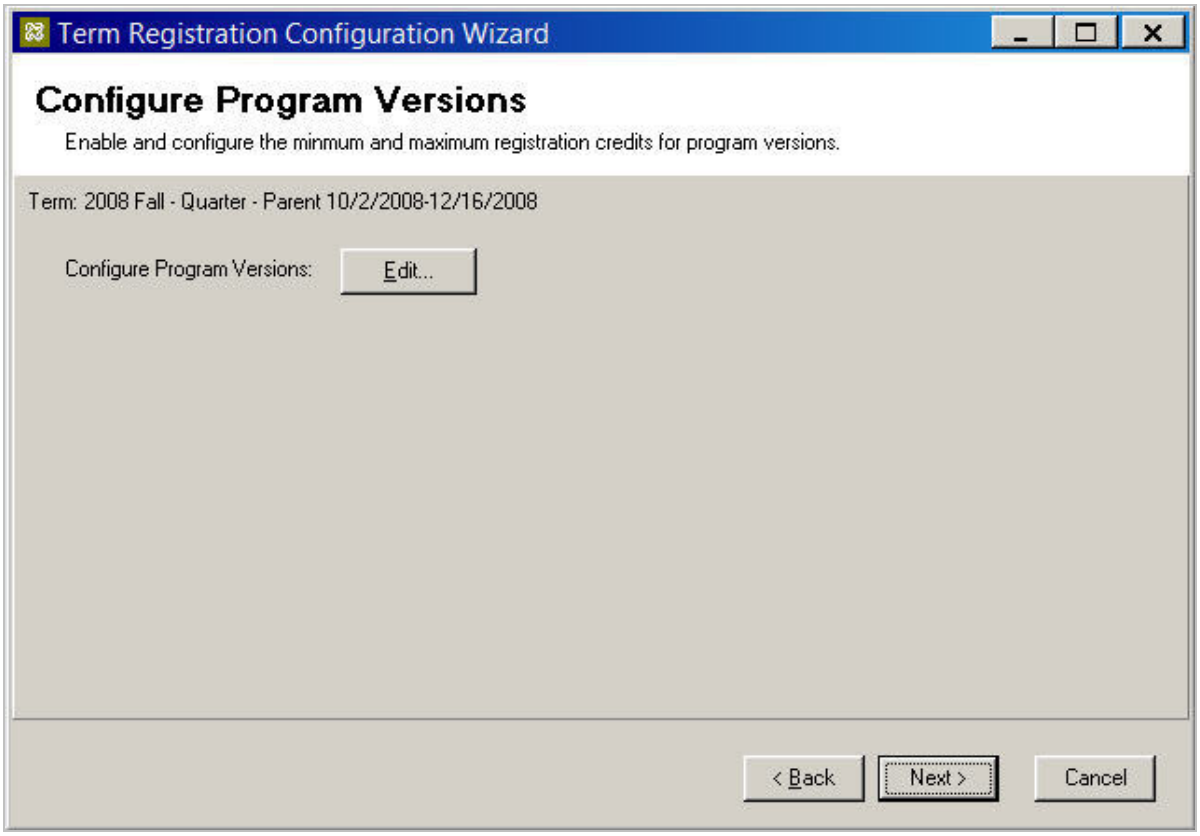
   Follow the instructions to Define Term Registration Groups (step 2) or click **Next**. This step may be bypassed if a parent term was selected.

9. On the Actions form, select appropriate options and click **Next**.

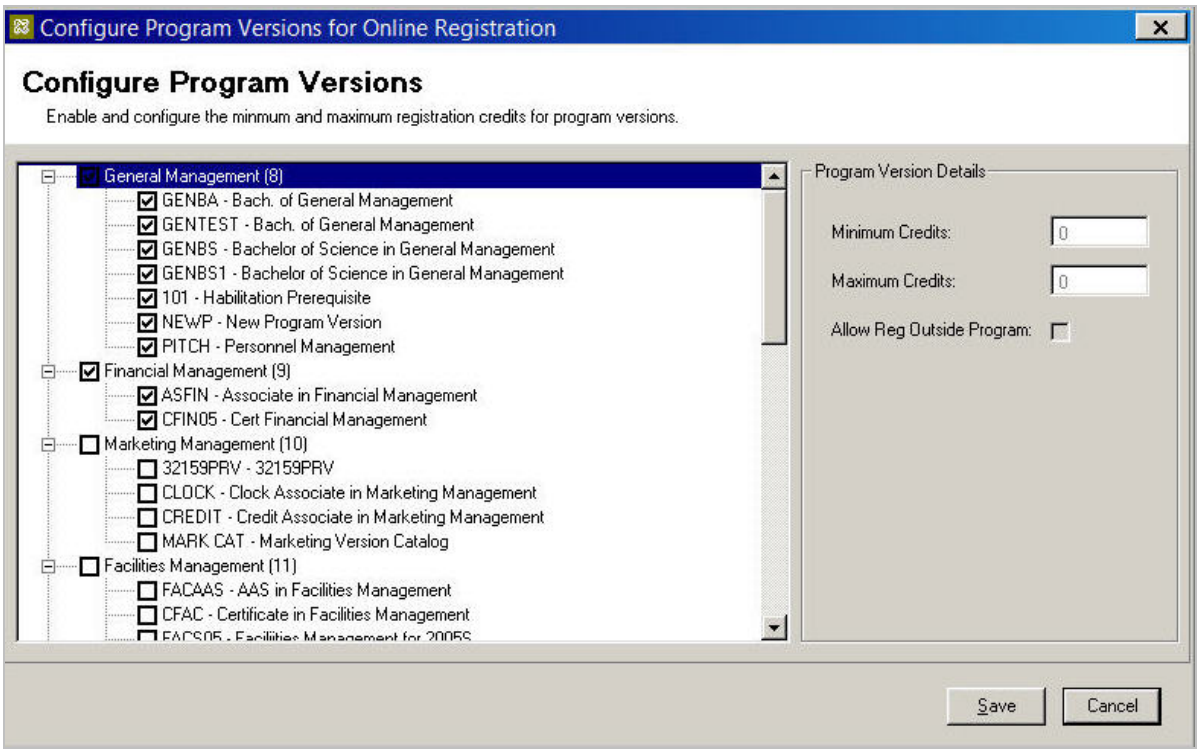
   Note: The minimum and maximum credits do not apply to parent terms and are disabled.



10. On the Configure Program Versions form, click **Edit** to configure program versions or click **Next**.



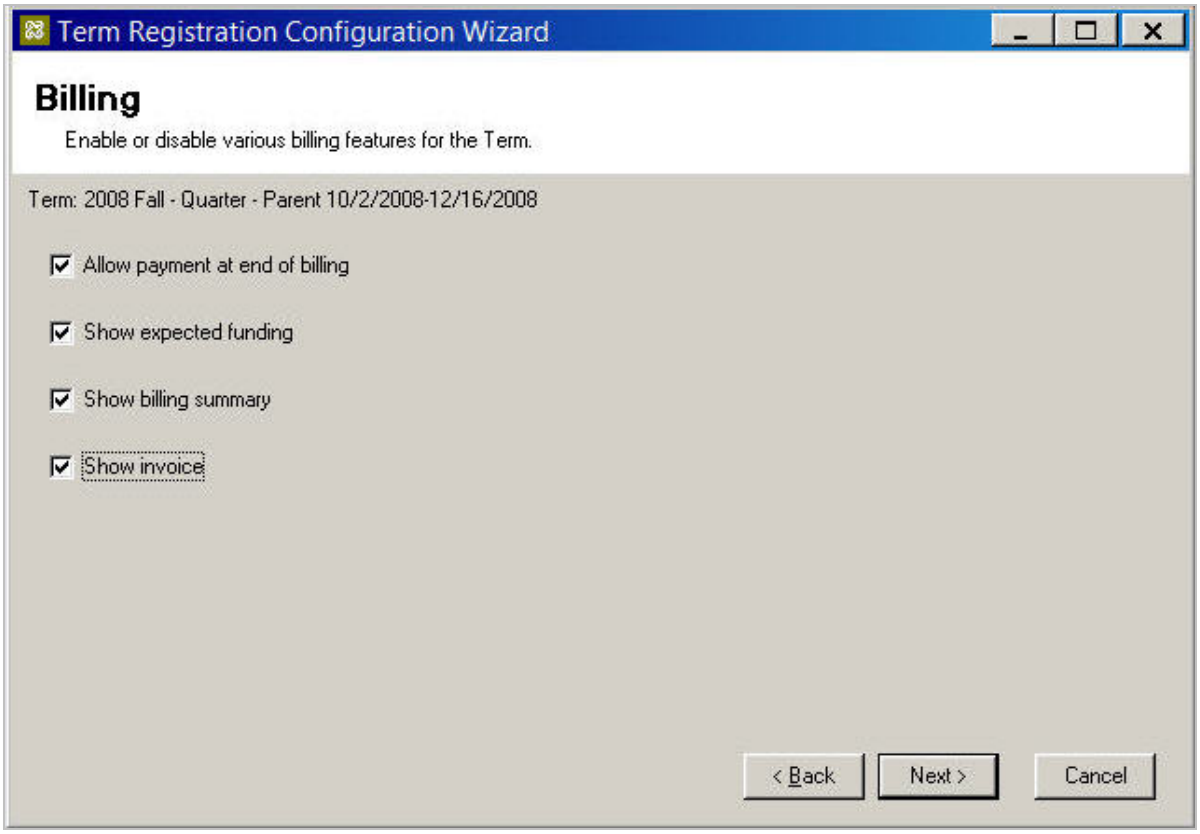
a. If you click **Edit**, the Configure Program Versions form is displayed.



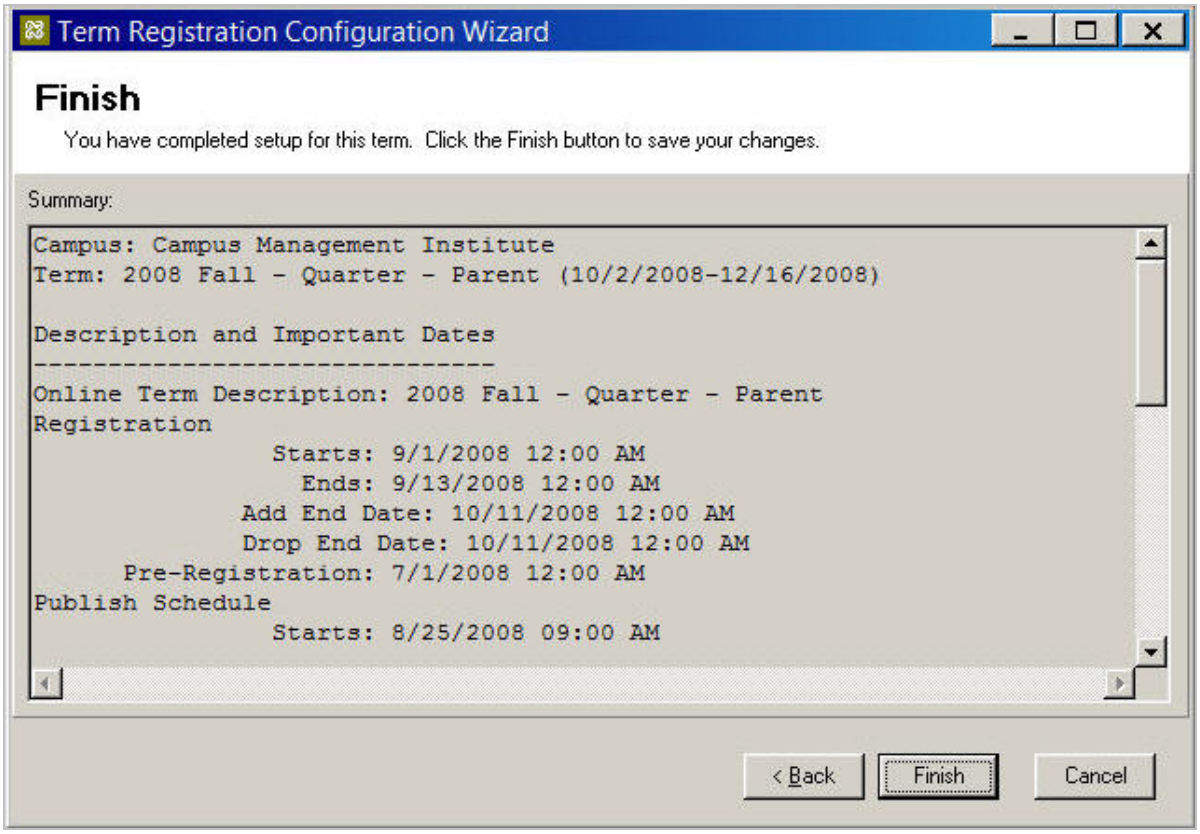
b. Select program versions.

c. Click **Save** to retain your selections.

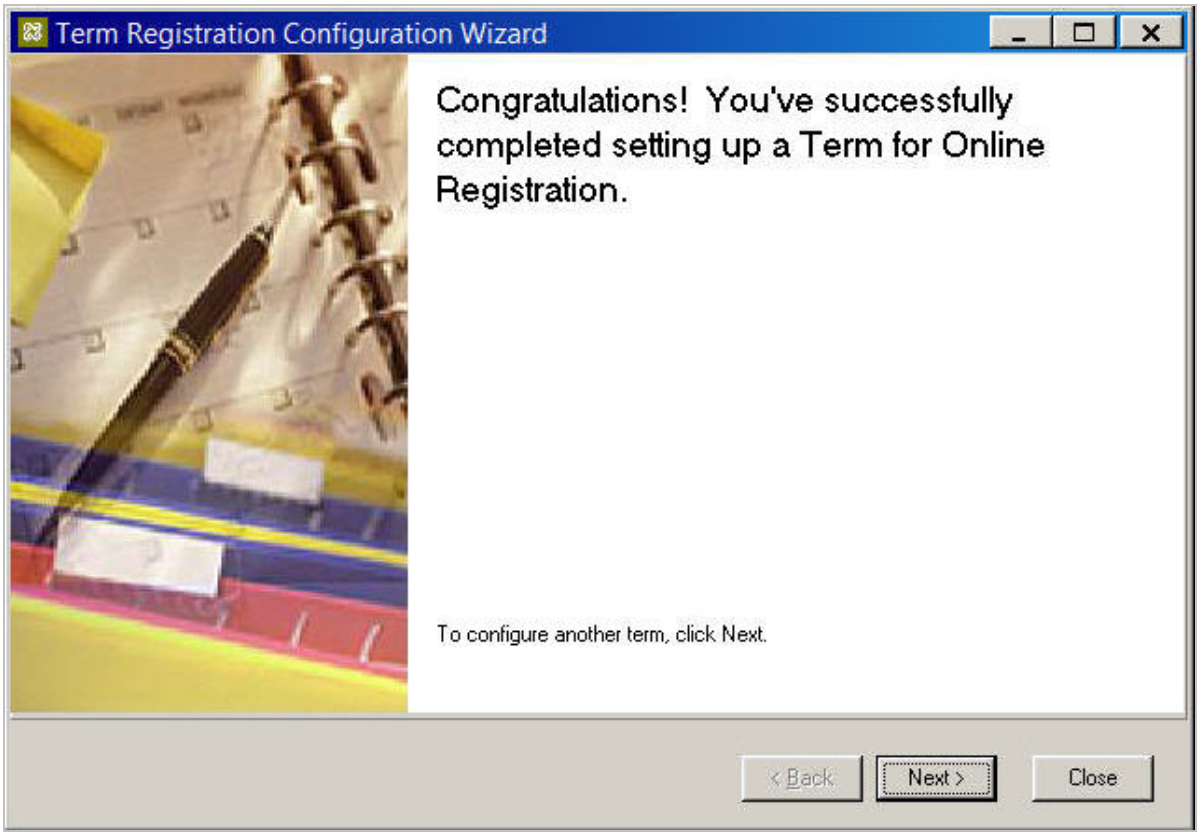
11. On the Billing form, select appropriate options and click **Next**.



12. Click **Next**. The Finish form is displayed.



13. Click **Finish** to complete the process. The Congratulations form is displayed.

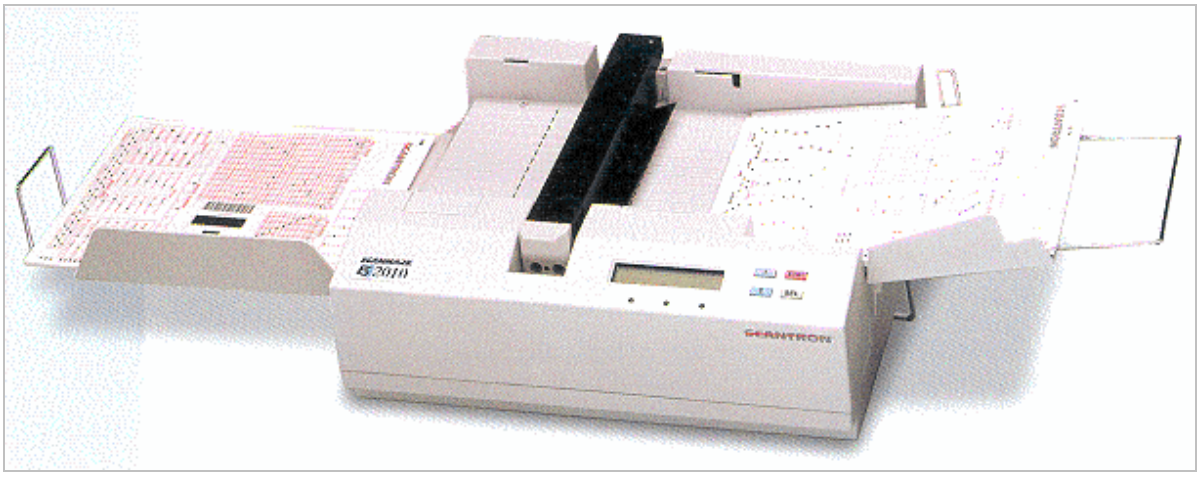


14. Click **Next** to configure another campus or **Close** to exit the process.

Scantron Overview

SCANTRON™ and ScanMark™ are registered trademarks of SCANTRON Corporation.

The SCANTRON interface enables a school to scan attendance or final grades from specially prepared forms, using a ScanMark optical mark reader (OMR). Anthology Inc. designed scannable forms -- final grades, attendance, and additional grade form. The forms may be purchased from SCANTRON. CampusNexus Student preprints class section identification and student rosters on the forms. The forms are distributed to instructors who mark the preprinted forms with attendance or grade data and return them for scanning. The scanning procedure creates data entry records that are processed by CampusNexus Student.



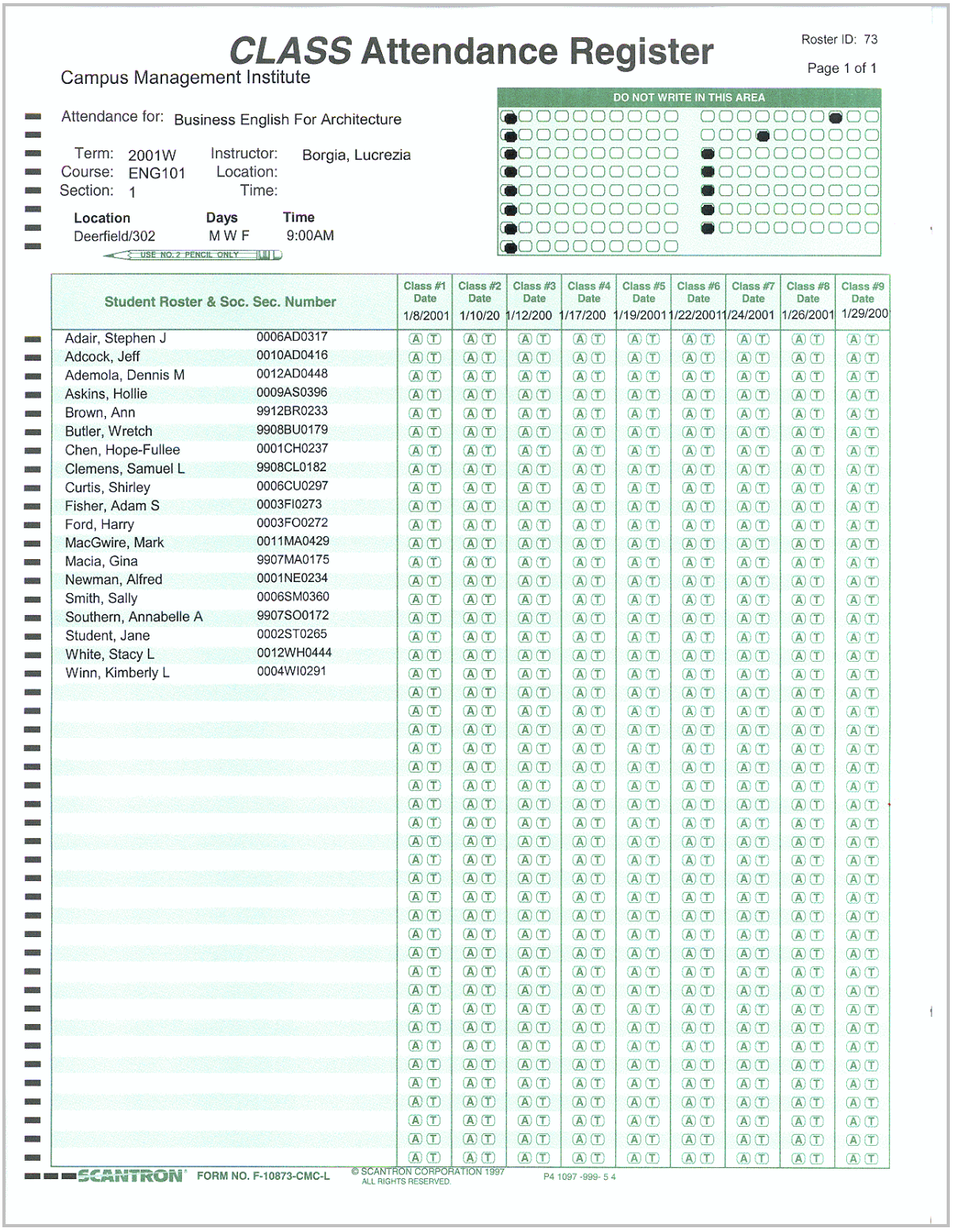
SCANTRON and ScanMark are registered trademarks of SCANTRON Corporation.

The "Scan Rosters" function works in conjunction with your ScanMark Optical Mark Reader (OMR) to scan the marked SCANTRON forms, then update the attendance or final grade data in CampusNexus Student. The operating procedure is the same for both forms.

SCANTRON readers that are capable of reading the forms are the SCANMARK models 2010, 2250, and 2260. The 2250 is no longer being manufactured. The 2260 has read heads capable of reading both sides of a form in a single pass. This capability is not used in CampusNexus Student but may be used for other applications at your school. The model 2010 is capable of reading one side of a form, which is all that is necessary for use with CampusNexus Student.

Attendance

Form No. F-10873-CMC-L. CampusNexus Student will print the course roster on a preprinted SCANTRON Attendance form (Form Type A). Instructors can mark students on the form as absent or tardy. No mark beside a student on the form indicates that the student was present in class. An indication of tardy is evaluated based on a percentage the of minutes that the class meets. The percentage is entered during the setup. Once the attendance form is complete and scanned, CampusNexus Student will import the attendance data and perform the update. This form accommodates 45 students and 9 meeting dates.



CLASS Attendance Register

Roster ID: 73

Page 1 of 1

Campus Management Institute

DO NOT WRITE IN THIS AREA

Attendance for: Business English For Architecture

Term: 2001W Instructor: Borgia, Lucrezia
Course: ENG101 Location:
Section: 1 Time:

Location	Days	Time
Deerfield/302	M W F	9:00AM

USE NO. 2 PENCIL ONLY

Student Roster & Soc. Sec. Number		Class #1 Date 1/8/2001	Class #2 Date 1/10/20	Class #3 Date 1/12/200	Class #4 Date 1/17/200	Class #5 Date 1/19/2001	Class #6 Date 1/22/2001	Class #7 Date 1/24/2001	Class #8 Date 1/26/2001	Class #9 Date 1/29/200
Adair, Stephen J	0006AD0317	A T	A T	A T	A T	A T	A T	A T	A T	A T
Adcock, Jeff	0010AD0416	A T	A T	A T	A T	A T	A T	A T	A T	A T
Ademola, Dennis M	0012AD0448	A T	A T	A T	A T	A T	A T	A T	A T	A T
Askins, Hollie	0009AS0396	A T	A T	A T	A T	A T	A T	A T	A T	A T
Brown, Ann	9912BR0233	A T	A T	A T	A T	A T	A T	A T	A T	A T
Butler, Wretch	9908BU0179	A T	A T	A T	A T	A T	A T	A T	A T	A T
Chen, Hope-Fullee	0001CH0237	A T	A T	A T	A T	A T	A T	A T	A T	A T
Clemens, Samuel L	9908CL0182	A T	A T	A T	A T	A T	A T	A T	A T	A T
Curtis, Shirley	0006CU0297	A T	A T	A T	A T	A T	A T	A T	A T	A T
Fisher, Adam S	0003FI0273	A T	A T	A T	A T	A T	A T	A T	A T	A T
Ford, Harry	0003FO0272	A T	A T	A T	A T	A T	A T	A T	A T	A T
MacGwire, Mark	0011MA0429	A T	A T	A T	A T	A T	A T	A T	A T	A T
Macia, Gina	9907MA0175	A T	A T	A T	A T	A T	A T	A T	A T	A T
Newman, Alfred	0001NE0234	A T	A T	A T	A T	A T	A T	A T	A T	A T
Smith, Sally	0006SM0360	A T	A T	A T	A T	A T	A T	A T	A T	A T
Southern, Annabelle A	9907SO0172	A T	A T	A T	A T	A T	A T	A T	A T	A T
Student, Jane	0002ST0265	A T	A T	A T	A T	A T	A T	A T	A T	A T
White, Stacy L	0012WH0444	A T	A T	A T	A T	A T	A T	A T	A T	A T
Winn, Kimberly L	0004WI0291	A T	A T	A T	A T	A T	A T	A T	A T	A T

SCANTRON FORM NO. F-10873-CMC-L

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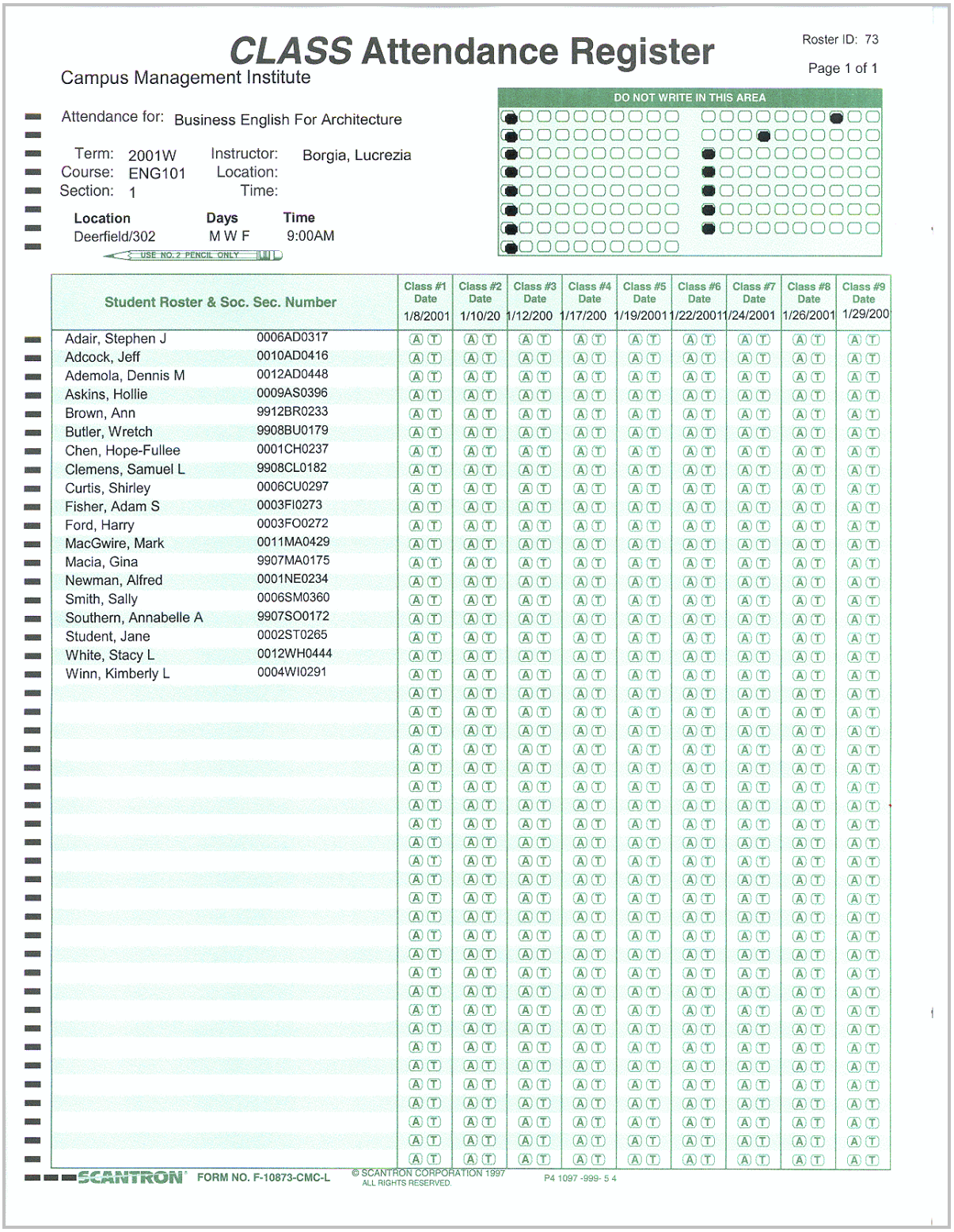
P4 1097 -999- 5 4

Form No. F-15174-CMC-L. This form is similar to the one described above. The principal difference is that it has a Present column for each meeting date. It will contain data for 46 students and 7 meeting dates. The instructor must mark one of the three options, present, absent, or tardy, for each student listed on the form. You must enter a percentage in the Tardiness Absent Percent field for use in calculating minutes to be deducted from scheduled class time.



CLASS Attendance Register

Roster ID: 73

Page 1 of 1

Campus Management Institute

DO NOT WRITE IN THIS AREA

Attendance for: Business English For Architecture

Term: 2001W
Course: ENG101
Section: 1

Instructor: Borgia, Lucrezia
Location:
Time:

Location	Days	Time
Deerfield/302	M W F	9:00AM

USE NO. 2 PENCIL ONLY

Student Roster & Soc. Sec. Number		Class #1 Date 1/8/2001	Class #2 Date 1/10/20	Class #3 Date 1/12/200	Class #4 Date 1/17/200	Class #5 Date 1/19/2001	Class #6 Date 1/22/2001	Class #7 Date 1/24/2001	Class #8 Date 1/26/2001	Class #9 Date 1/29/200
Adair, Stephen J	0006AD0317	A T	A T	A T	A T	A T	A T	A T	A T	A T
Adcock, Jeff	0010AD0416	A T	A T	A T	A T	A T	A T	A T	A T	A T
Ademola, Dennis M	0012AD0448	A T	A T	A T	A T	A T	A T	A T	A T	A T
Askins, Hollie	0009AS0396	A T	A T	A T	A T	A T	A T	A T	A T	A T
Brown, Ann	9912BR0233	A T	A T	A T	A T	A T	A T	A T	A T	A T
Butler, Wretch	9908BU0179	A T	A T	A T	A T	A T	A T	A T	A T	A T
Chen, Hope-Fullee	0001CH0237	A T	A T	A T	A T	A T	A T	A T	A T	A T
Clemens, Samuel L	9908CL0182	A T	A T	A T	A T	A T	A T	A T	A T	A T
Curtis, Shirley	0006CU0297	A T	A T	A T	A T	A T	A T	A T	A T	A T
Fisher, Adam S	0003FI0273	A T	A T	A T	A T	A T	A T	A T	A T	A T
Ford, Harry	0003FO0272	A T	A T	A T	A T	A T	A T	A T	A T	A T
MacGwire, Mark	0011MA0429	A T	A T	A T	A T	A T	A T	A T	A T	A T
Macia, Gina	9907MA0175	A T	A T	A T	A T	A T	A T	A T	A T	A T
Newman, Alfred	0001NE0234	A T	A T	A T	A T	A T	A T	A T	A T	A T
Smith, Sally	0006SM0360	A T	A T	A T	A T	A T	A T	A T	A T	A T
Southern, Annabelle A	9907SO0172	A T	A T	A T	A T	A T	A T	A T	A T	A T
Student, Jane	0002ST0265	A T	A T	A T	A T	A T	A T	A T	A T	A T
White, Stacy L	0012WH0444	A T	A T	A T	A T	A T	A T	A T	A T	A T
Winn, Kimberly L	0004WI0291	A T	A T	A T	A T	A T	A T	A T	A T	A T

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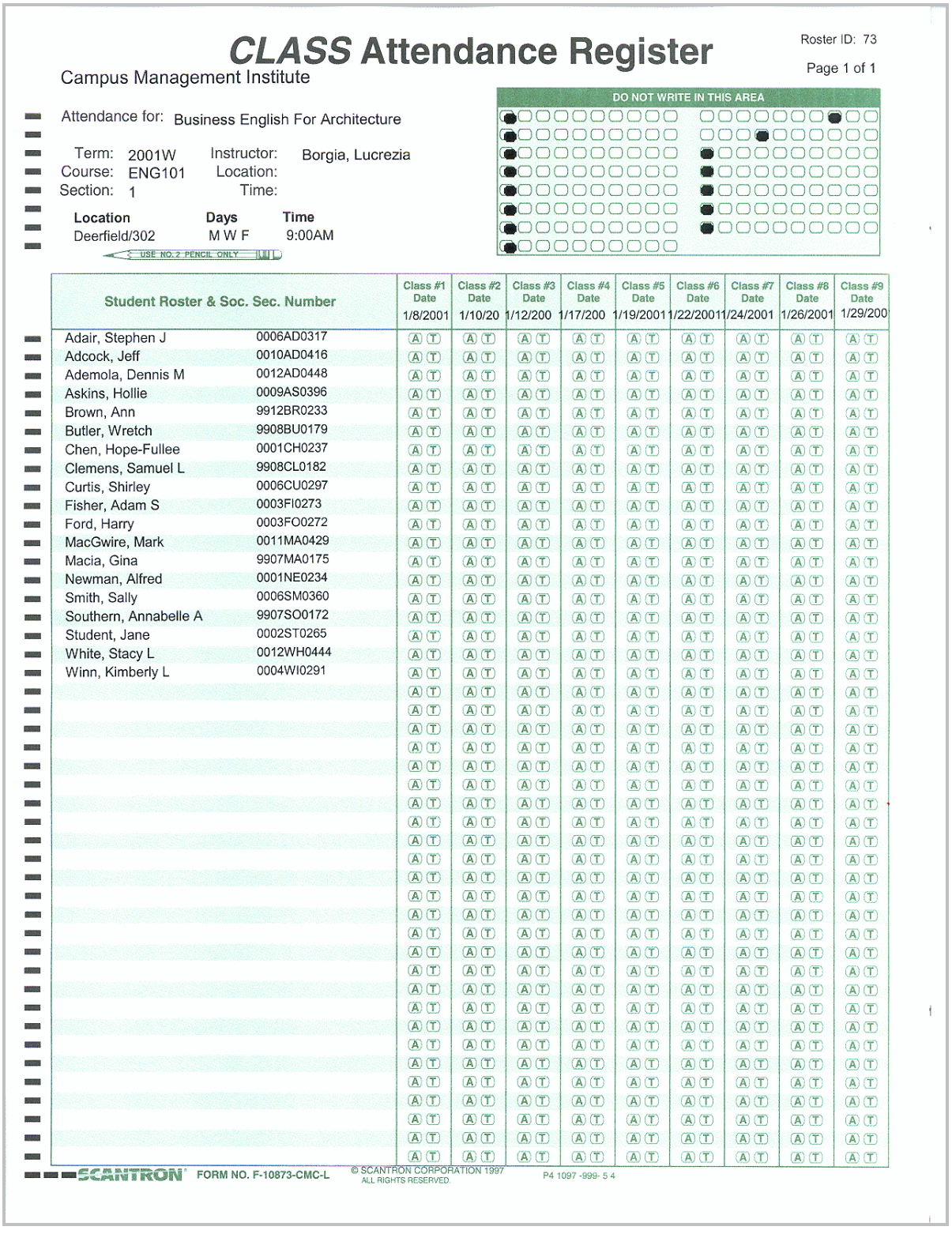
P4 1097 -999- 5 4

Form No. F-15175-CMC-L. The third style of attendance form can contain data for 22 students and 5 meeting dates. For this form, you must set up a code table to represent the bubbles on the form. You can designate meanings for 10 bubbles for each student. You can code a bubble to mean present, absent, excused absence, and/or several degrees of tardiness. The codes you set up will be printed at the bottom of the form for easy reference by the instructors.



CLASS Attendance Register

Roster ID: 73

Page 1 of 1

Campus Management Institute

DO NOT WRITE IN THIS AREA

Attendance for: Business English For Architecture

Term: 2001W Instructor: Borgia, Lucrezia
Course: ENG101 Location:
Section: 1 Time:

Location	Days	Time
Deerfield/302	M W F	9:00AM

USE NO. 2 PENCIL ONLY

Student Roster & Soc. Sec. Number		Class #1 Date 1/8/2001	Class #2 Date 1/10/20	Class #3 Date 1/12/200	Class #4 Date 1/17/200	Class #5 Date 1/19/2001	Class #6 Date 1/22/2001	Class #7 Date 1/24/2001	Class #8 Date 1/26/2001	Class #9 Date 1/29/200
Adair, Stephen J	0006AD0317	A T	A T	A T	A T	A T	A T	A T	A T	A T
Adcock, Jeff	0010AD0416	A T	A T	A T	A T	A T	A T	A T	A T	A T
Ademola, Dennis M	0012AD0448	A T	A T	A T	A T	A T	A T	A T	A T	A T
Askins, Hollie	0009AS0396	A T	A T	A T	A T	A T	A T	A T	A T	A T
Brown, Ann	9912BR0233	A T	A T	A T	A T	A T	A T	A T	A T	A T
Butler, Wretch	9908BU0179	A T	A T	A T	A T	A T	A T	A T	A T	A T
Chen, Hope-Fullee	0001CH0237	A T	A T	A T	A T	A T	A T	A T	A T	A T
Clemens, Samuel L	9908CL0182	A T	A T	A T	A T	A T	A T	A T	A T	A T
Curtis, Shirley	0006CU0297	A T	A T	A T	A T	A T	A T	A T	A T	A T
Fisher, Adam S	0003FI0273	A T	A T	A T	A T	A T	A T	A T	A T	A T
Ford, Harry	0003FO0272	A T	A T	A T	A T	A T	A T	A T	A T	A T
MacGwire, Mark	0011MA0429	A T	A T	A T	A T	A T	A T	A T	A T	A T
Macia, Gina	9907MA0175	A T	A T	A T	A T	A T	A T	A T	A T	A T
Newman, Alfred	0001NE0234	A T	A T	A T	A T	A T	A T	A T	A T	A T
Smith, Sally	0006SM0360	A T	A T	A T	A T	A T	A T	A T	A T	A T
Southern, Annabelle A	9907SO0172	A T	A T	A T	A T	A T	A T	A T	A T	A T
Student, Jane	0002ST0265	A T	A T	A T	A T	A T	A T	A T	A T	A T
White, Stacy L	0012WH0444	A T	A T	A T	A T	A T	A T	A T	A T	A T
Winn, Kimberly L	0004WI0291	A T	A T	A T	A T	A T	A T	A T	A T	A T

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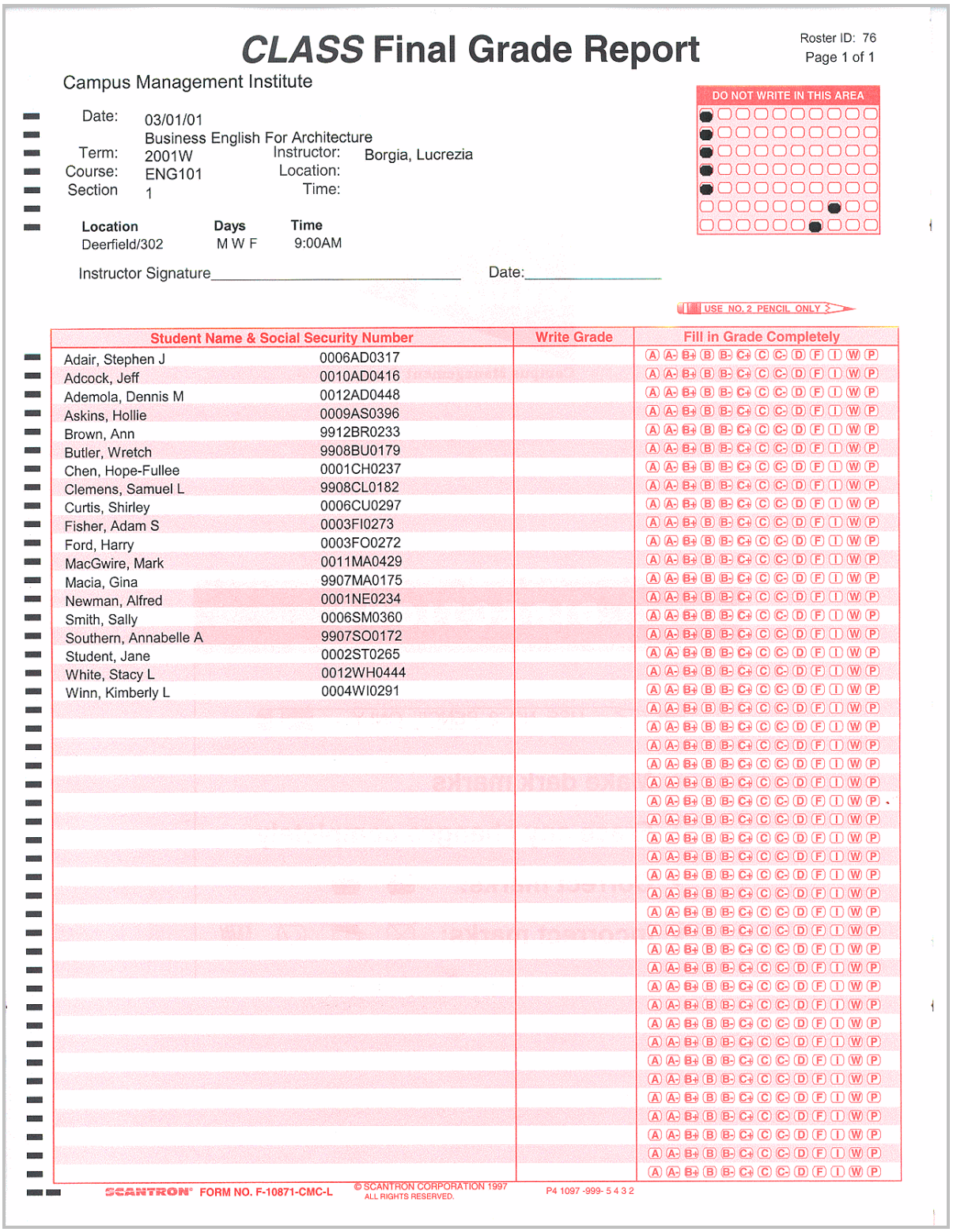
Final Grades

Form No. F-10871-CMC-L. CampusNexus Student will print the course roster on a preprinted SCANTRON Final Grade form (Form Type G). Instructors must select one of the grades on the form. If the instructor selects a letter grade on the form that is not found in the grade scale for the student's program version, CampusNexus Student will apply the closest grade from the scale.

For instance, the instructor marks B+ for a student on the form, but the grade scale lists only grades A, B, C, D, and F. The program will convert the instructor's B+ to B. This form may not be used for recording midterm grades. This form accommodates 45 students.



CLASS Final Grade Report

Roster ID: 76
Page 1 of 1

Campus Management Institute

DO NOT WRITE IN THIS AREA

Date: 03/01/01
Business English For Architecture
Term: 2001W Instructor: Borgia, Lucrezia
Course: ENG101 Location:
Section 1 Time:

Location	Days	Time
Deerfield/302	M W F	9:00AM

Instructor Signature_____ Date:_____

USE NO. 2 PENCIL ONLY

Student Name & Social Security Number		Write Grade	Fill in Grade Completely
Adair, Stephen J	0006AD0317		A A- B+ B B- C+ C C- D F I W P
Adcock, Jeff	0010AD0416		A A- B+ B B- C+ C C- D F I W P
Ademola, Dennis M	0012AD0448		A A- B+ B B- C+ C C- D F I W P
Askins, Hollie	0009AS0396		A A- B+ B B- C+ C C- D F I W P
Brown, Ann	9912BR0233		A A- B+ B B- C+ C C- D F I W P
Butler, Wretch	9908BU0179		A A- B+ B B- C+ C C- D F I W P
Chen, Hope-Fullee	0001CH0237		A A- B+ B B- C+ C C- D F I W P
Clemens, Samuel L	9908CL0182		A A- B+ B B- C+ C C- D F I W P
Curtis, Shirley	0006CU0297		A A- B+ B B- C+ C C- D F I W P
Fisher, Adam S	0003FI0273		A A- B+ B B- C+ C C- D F I W P
Ford, Harry	0003FO0272		A A- B+ B B- C+ C C- D F I W P
MacGwire, Mark	0011MA0429		A A- B+ B B- C+ C C- D F I W P
Macia, Gina	9907MA0175		A A- B+ B B- C+ C C- D F I W P
Newman, Alfred	0001NE0234		A A- B+ B B- C+ C C- D F I W P
Smith, Sally	0006SM0360		A A- B+ B B- C+ C C- D F I W P
Southern, Annabelle A	9907SO0172		A A- B+ B B- C+ C C- D F I W P
Student, Jane	0002ST0265		A A- B+ B B- C+ C C- D F I W P
White, Stacy L	0012WH0444		A A- B+ B B- C+ C C- D F I W P
Winn, Kimberly L	0004WI0291		A A- B+ B B- C+ C C- D F I W P

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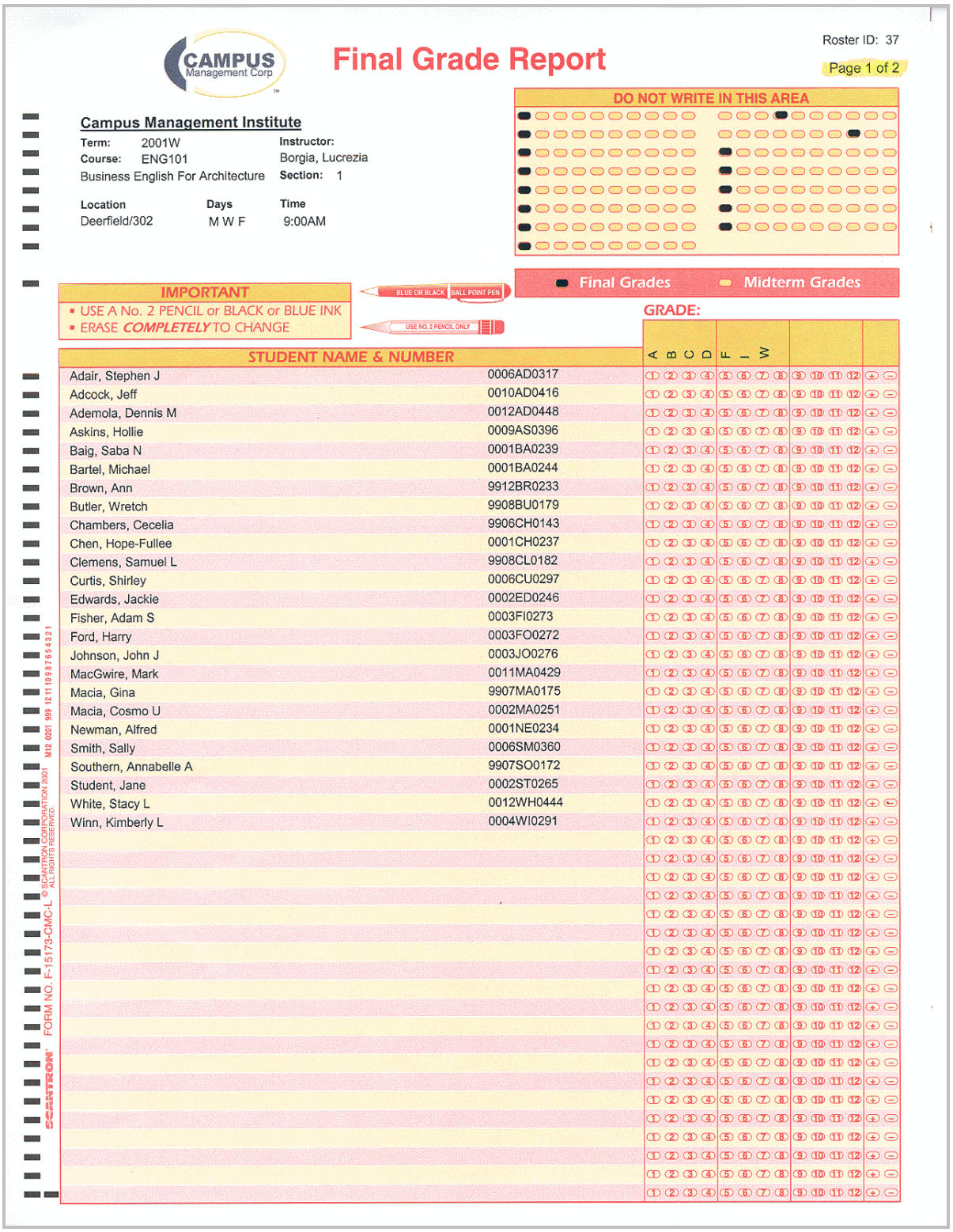
Form No. F-15173-CMC-L. This grading form may be used for midterm or final grades. The form contains rows for 45 students. If you do use it for midterm grades, each class section to be graded must have a lesson defined with a code of MIDTERM. The form contains twelve columns for grades and columns to indicate plus (+) or minus (-). The grades are printed vertically by the program in the column headers. Grades in the grade scales may have three-character codes. The grades from which you select come from the grading scale you select when setting up the Scantron options. If a grade has plus or minus suffixes in the grading scale, the instructor can mark the suffix to go with the selected grade. This form accommodates 45 students.



CAMPUS Management Corp

Final Grade Report

Roster ID: 37

Page 1 of 2

Campus Management Institute

Term: 2001W
Course: ENG101
Business English For Architecture
Instructor: Borgia, Lucrezia
Section: 1

Location	Days	Time
Deerfield/302	M W F	9:00AM

DO NOT WRITE IN THIS AREA

Final Grades Midterm Grades

IMPORTANT
- USE A No. 2 PENCIL or BLACK or BLUE INK
- ERASE *COMPLETELY* TO CHANGE

BLUE OR BLACK BALL POINT PEN

USE NO. 2 PENCIL ONLY

GRADE: A B C D F I W

STUDENT NAME & NUMBER	
Adair, Stephen J	0006AD0317
Adcock, Jeff	0010AD0416
Ademola, Dennis M	0012AD0448
Askins, Hollie	0009AS0396
Baig, Saba N	0001BA0239
Bartel, Michael	0001BA0244
Brown, Ann	9912BR0233
Butler, Wretch	9908BU0179
Chambers, Cecelia	9906CH0143
Chen, Hope-Fullee	0001CH0237
Clemens, Samuel L	9908CL0182
Curtis, Shirley	0006CU0297
Edwards, Jackie	0002ED0246
Fisher, Adam S	0003FI0273
Ford, Harry	0003FO0272
Johnson, John J	0003JO0276
MacGwire, Mark	0011MA0429
Macia, Gina	9907MA0175
Macia, Cosmo U	0002MA0251
Newman, Alfred	0001NE0234
Smith, Sally	0006SM0360
Southern, Annabelle A	9907SO0172
Student, Jane	0002ST0265
White, Stacy L	0012WH0444
Winn, Kimberly L	0004WI0291

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Once grades are marked and scanned, CampusNexus Student will import the grade information and perform the update. Once a grade is scanned and posted for a student in a class section, changes cannot be made via the scanning procedure. A grade roster is ignored if it is scanned a second time. However, if a class section has been partially graded, and the partially marked form is scanned and posted. You can print a new grade roster for the students who do not yet have grades.

Numeric grades are not processed via SCANTRON at this time.

Setup and Processing

The following specifications are for the ScanMark 2000 - 2500 Series OMR or the new ScanMark ES2010/ES2260 machines. The predefined Anthology Inc.forms can be read in either machine. As of this date, the ScanMark 2000 - 2500 series machines are no longer being made, however SCANTRON is still servicing the machines, and making parts.

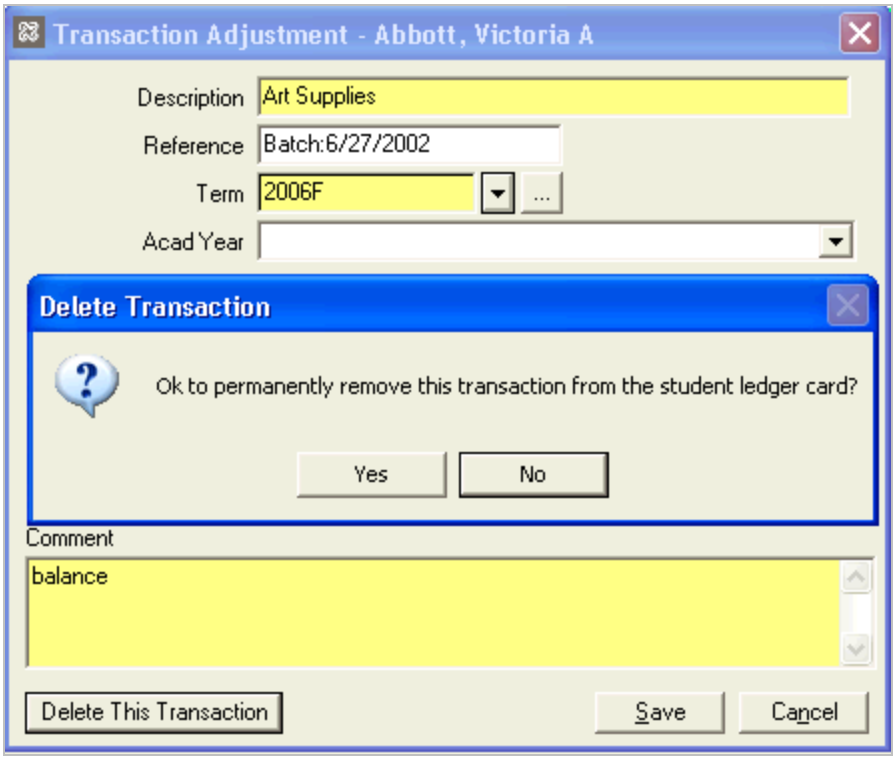
Setup > Academic Records > Scantron

A new "SCANTRON" tab has been added to the Academic Records setup form. Options on this tab include:

- Path to SCANTRON Files
- SCANTRON Attendance Form
- SCANTRON Grade Form
- SCANTRON Port (COM port)
- Tardiness Percentage (0 to 99 percent)
- Test SCANTRON Machine (button to test communications).

The forms are selected from a drop-down list. Only those where the type is relevant to the selection are displayed. The COM port is a drop-down list of available ports. The path includes a standard browse option.

The "Path to SCANTRON files" must be on the PC to which the SCANTRON optical mark reader is attached. The process does not work reliably when these files are installed on a network server. The SCANTRON files are installed at `C:\Program Files\CMC\CampusNexus Student`. The attendance and grade form definition files are shown below.



When you click Test Communications, your PC will send a signal to the SCANTRON unit and receive a signal back from the unit, which confirms that the two units are properly connected. CampusNexus Student displays a positive or negative message depending on the results of the communications test.

Another, more visible means of testing the communications between the two units may be performed under Daily/Academic Records/SCANTRON. On the "**Scan Rosters**" tab, click Scan Final Grades or Scan Attendance while watching the green lights data-activity lights on the SCANTRON unit. You will see the lights flashing. CampusNexus Student will also display a message indicating that the system is ready to scan the selected forms.

Daily > Academic Records > Scanning Services

This new menu option leads to a "Scantron" form. The form has three tabs--**Print Scantron Rosters**, **Scan Rosters**, and **Roster Maintenance**.

Print SCANTRON Rosters

From this option, you can produce reports for processing attendance and grades. These reports are intended to be printed on the Scantron forms.

Tabs are on the top for options. The caption at the top says "Roster Selections". You are given the choice of Attendance Rosters or Grade Rosters.

When printing rosters for large classes, you will be printing two or more form pages for each class section. Each page contains a unique roster ID code in the preprinted "slugs" at the top right corner of the forms. This machine-readable code is interpreted for you above the ID boxes. Additionally, each form header contains a page number in the format "Page x of x". This will help you to keep multi-page rosters together even though they have different roster IDs.

For example, using Form F-10873-CMC-L (45 detail lines) for a class with 51 students, two attendance roster forms will be printed for a selected span of nine meeting dates. The first form, say it is roster ID 1923, will contain the first 45 students in the class section listed in alphabetical order. Also in the header of this form will be "Page 1 of 2". The next form printed will be roster ID 1924. It will be labeled "Page 2 of 2" and contain the last six students in the alphabetical list. The forms are independent of each other for processing purposes. It is not necessary that they be processed in sequential order. However, to post attendance for the entire class section, both forms must be scanned after the instructor marks them.

Likewise, two F-10871-CMC-L forms would be used to print the final grades roster with 45 students on the first form and 6 on the next form.

Attendance Rosters

When the Attendance Rosters option is selected, the Campus defaults to the campus you are signed into. The Term is a required selection. The rest of the fields on the form are included for additional selection criteria but not required.

You cannot specify unscheduled class sections for attendance rosters. The SCANTRON attendance options are not be available for courses that meet at unscheduled days and times because there is insufficient data with which to build a SCANTRON roster. **You can print a final grade roster for an unscheduled class section.**

CampusNexus Student keeps track of the dates to be printed on the column headers of the attendance forms. The first time attendance forms are printed, the program uses the **start date of the class section** as the first column header and continues with sequential meeting dates across the form. On subsequently printed attendance rosters for the same class section, the program will begin the dates in the column headers with the **next date of attendance** that is not yet posted.

When you click "Next", you are prompted to select the SSN, Enrollment Number, Student ID, or Telephone Number as an identifier on the roster. An option to Include Dropped Students, and LOAs is also displayed. You can sort the rosters to be printed by instructor, room, or class section code. The students on the rosters are sorted by name or by SSN. Note that the program does not sort by Enrollment Number, Student ID, or Telephone Number.

When you select the "Finish" button, CampusNexus Student gathers all records using the existing logic for standard attendance rosters. The following data items print on the SCANTRON Forms: Class Schedule ID, Instructor, Course Code, Section, Location and Time, and dates of attendance.

If the number of students in the class section is greater than the number of detail lines on the form, the program will process and print the remaining students on an additional page or pages and print a new SCANTRON Roster ID and page number on each.

Additional items to be printed on the roster will be the attendance dates and names of students who are determined to be included on the roster from the selections above. The student information is written to a SCANTRON Roster Detail table, this includes the SCANTRON Roster ID, Enrollment Schedule ID, the batch position of the student on the roster, and the Student ID.

Machine-readable information printed on the form will be in the form of "slugs". The positions of the "slugs" are defined in the SCANTRON form definition file. They will print in the control boxes. When printed, the "slugs" must line up horizontally with the timing marks on the left margin of the form.

Additionally, the Course information, Student Name, and the selected Student ID will be printed on the forms. The Roster ID and page number will be printed on the upper right corner of the form.

Final Grade Rosters

When the option to Print Final Grade Rosters is selected, the options are nearly identical to the selections when printing attendance rosters. You will have the same selection criteria where the campus defaults to your default campus. The term is required, the instructor, shift, course, and section are optional.

The program will gather the students in the selected courses using the same logic as the final grades worksheet. If the number of students is greater than the number of detail lines on the form, the program will create two or more roster sheets having unique IDs and sequential page numbers for the remaining students.

A Grade Roster Detail report is printed on the preprinted SCANTRON forms. Students can be listed in alphabetical order by name or by SSN on each form and the forms are printed in the print sort order you selected.

Machine-readable information printed on the form will be in the form of "slugs". The positions of the slugs are defined in the SCANTRON form definition file. They will print in the control boxes. When printed, the "slugs" must line up horizontally with the timing marks on the left margin of the form.

Additionally, the Course information, Student Name, and selected Student ID will be printed on the forms. The Roster ID and page number will be printed in the upper right corner of the form.

Note: Once a final grade has been posted for a student in a class section (for instance, a grade is manually posted), that student will no longer appear on a subsequently printed final grade roster for the class section.

Scan Rosters

The "Scan Rosters" function will scan the marked forms then update the attendance or final grade data.

The SCANTRON optical mark readers that are capable of reading the forms are the SCANMARK models 2010, 2250, and 2260. The 2250 is no longer being manufactured. The 2260 has read heads capable of reading both sides of a form in a single pass. This capability is not used in CampusNexus Student but may be used for other applications at your school. The model 2010 is capable of reading one side of a form, which is all that is necessary for use with CampusNexus Student.

The Scan Rosters option will communicate with the SCANTRON machine. You are prompted to select to Scan Attendance Rosters or Scan Grade Rosters. As an optional checking device, you can key in the number of pages you are going to scan. The program will count the number of pages scanned and stop when it reaches the number you entered. You can also stop the process by pressing the End button on the SCANTRON machine. When you proceed, the program will display "Please Wait, Processing Rosters".

Depending on whether you selected attendance or grades, CampusNexus Student will use your form selection to send the correct form definition file to the SCANTRON OMR. (Form definition files have a file name extension of .800.) CampusNexus Student will then wait for the return of the text string(s). The machine will create a text string based on the format defined in the form definition file. This data will then be interpreted and imported into CampusNexus Student.

CampusNexus Student processes each form completely as it is scanned. The data from the form is applied to the records of the listed students before the next form is read. If the Scantron OMR rejects a form, none of the data on that form is applied to the CampusNexus Student database. See "Rejected Forms" below.

Once a final grade form has been scanned and imported into CampusNexus Student, it cannot be rescanned. The database records prepared when the form was printed are marked has having been scanned.

The attendance form, on the other hand, can be scanned repeatedly as data for each succeeding meeting date is marked. Thus, if attendance is marked and scanned after every meeting date, a form would be scanned several times before it is completed. An attendance form that has been scanned at least once has a status of "partially scanned" in the database. Meeting dates that have been previously scanned are not scanned again.

If an attendance roster includes the current date, only columns up to and including the current date are scanned**. The program does not distinguish time-of-day**. Therefore, it is better to scan the forms the day after the class meets rather than the same day.

This would prevent, for instance, a roster for an evening class accidentally being scanned in the afternoon before the class meets.

Note that a class roster form, attendance or grades, can be reprinted if necessary (a form is lost in distribution, for example). If two forms are submitted covering the same class section meeting dates or the same class section grades, only the first form submitted will count. CampusNexus Student will reject subsequent submittals.

Rejected Forms

Forms that are rejected by the SCANTRON unit must be corrected and resubmitted or posted manually. Rejected forms are not considered as processed by CampusNexus Student. Therefore, if the instructor's intention can be determined and corrected by the SCANTRON operator, the form can be resubmitted. If the form is so damaged physically that the SCANTRON unit cannot process it, you must print and mark another roster. Alternatively, you can manually post the data from the form through the CampusNexus Student batch attendance or batch grade posting procedures.

Scan Attendance

CampusNexus Student reads the incoming file, first by identifying the SCANTRON Roster ID. Using the SCANTRON Roster table, it then identifies the Class Schedule ID and matches the SCANTRON Roster Dates table to determine which dates on the roster need to be updated.

Using the SCANTRON Roster Detail table, the program updates the attendance records for the selected students. The attendance update logic is identical to the existing method of batch posting attendance. After posting the attendance data, the program updates the SCANTRON Roster Dates Scan Flag to true for the dates posted. If all date fields for the selected SCANTRON Roster ID have the scan flag set to True, the SCANTRON Roster Status flag is updated to "C - Complete". Once the update is complete, a "Processing Complete" message box is displayed. When you select OK, the program may display a second message box listing rosters that were not processed because they had been previously scanned. Click OK to close this message also.

Attendance Scanning and Posting Considerations

Example: ENG101 Section 1 meets Monday, Wednesday, and Friday. The term begins on Tuesday 09/05/00 (the day after Labor day) and ends on Friday 12/15/00. The first meeting date for ENG101 1 is Wednesday 09/06/00 and the last meeting date is Friday 12/15/00. Using form number F-10873-CMC-L, the first attendance roster printed (roster ID 1923, for example) will have the following dates as column headers: 9/6/00, 9/8/00, 9/11/00, 9/13/00, 9/15/00, 9/18/00, 9/20/00, 9/22/00, and 9/25/00.

Consider these questions and examples when planning your SCANTRON processing:

- How is your school going to process attendance? Daily, weekly, after each form is completely marked (all meeting dates), some other cycle?
- How will the forms be distributed for marking and collected for scanning?
- Who will deal with missing, unreadable, damaged, and incorrectly marked forms?
- Attendance will not be posted for dates beyond the current system date.
- It is possible to print another attendance form covering the same meeting dates (if, for instance the first one is lost). The second form printed will have a different Roster ID. However, whichever of the forms is scanned first controls the posting. The one that is scanned second is ignored for the dates that have been posted from the first form.
- If you scan an attendance roster with no marks on it, i.e., perfect attendance for the class section, only the first date not previously recorded will be updated. In the case of our example, if all students on roster 1923 are present, on time, for 9/6/00, there will be no marks on the form. If form 1923 is scanned on or after 9/6/00, the students on the form will all be recorded as present on 9/6/00. No other dates will be affected. CampusNexus Student will not scan and post roster 1923 for 9/6/00 again, even if the instructor subsequently marks someone absent or tardy on that date. **The SCANTRON process will not overwrite previously scanned attendance dates.**
- As an extreme example, when using form 10873 on which "Present" is the default, if the class section achieves perfect attendance for all nine meeting dates on the form, you must scan it nine times to post attendance for all

meeting dates. The program can detect and process only one perfect attendance date at a time. The exception to this rule is described next.

- If, when using form 10873, the instructor does not take attendance on 9/8/00 or 9/11/00, but does take attendance on 9/13/00 and marks any student absent and/or tardy, all students will be marked as present for 9/8/00 and 9/11/00. To stretch this point, say that the instructor, on 9/25/00, puts one mark, absent or tardy, on any student on roster 1923. The form contains no other attendance markings. If the form, having never been scanned before, is scanned on 9/25/00, all students (except the one with the mark) will be marked present for all meeting dates on the form, up to and including 9/25/00.
- The examples above do not apply to forms 15174 and 15275 because the instructor is required to mark each student as present, absent, or tardy.
- Once a meeting date has been scanned (posted) for a given roster ID, you cannot scan and post another roster ID with the same date for the same students. (This does not mean that you cannot post the multiple pages necessary for a large class section.)
- Any changes to previously scanned attendance data must be made manually.

Scan Final Grades

CampusNexus Student will read the file, first identifying the SCANTRON Roster ID. Using the SCANTRON Roster table, it then identifies the Class Schedule ID and the students on the rosters using the SCANTRON Roster Detail table. It updates the appropriate records in the Class Schedule table and Enrollment Schedule table to finalize the grade posting. The program uses the same logic as the Daily > Academic Records > Final Grades batch entry form uses. No numeric grades will be recorded. Once the update is complete, a "Final Grade Processing Complete" message is displayed. Once a final grade form has been scanned, scanning it again has no effect.

Roster Maintenance

This option shows the students on the roster in the list on the right side of the form and new students added after the roster was printed on the left side of the form. If the roster has not been completely processed (Status C), you can add the new students to the roster. A message box with the student position on the form is displayed. If the roster is for Attendance (Form Type A), a list of dates processed for the roster will also be displayed on the Roster Maintenance tab.

Scantron Roster Status Report

Reports > Academic Records > Scantron Roster Status

This report provides information for tracking your SCANTRON Attendance and Final Grade forms. Using the various selection criteria, you can determine the status of any SCANTRON form printed or processed in CampusNexus Student. Selection criteria include campus group, term, course, and instructor. Additional comparison variables include Roster ID, form type (attendance, grades, or both), date printed, section, and roster status (complete, printed, partially scanned, or all). The sort is program-controlled by campus, term, course, section, and roster ID.

Details on the report include campus, term, course, section, instructor, form type, roster ID, date printed, roster status, and (for attendance) dates included on the form.

Setting Up a Scantron Interface

Following are notes that may come in handy when configuring a school workstation for use with the CampusNexus Student Scantron interface.

Example 1. Workstation is on a **Local Area Network (LAN)** running CampusNexus Student on local servers.

1. Environment: The Scantron unit is connected to the COM 1 or COM 2 port on the workstation PC using a null modem cable. Follow Scantron's recommendation for the OMR you are using.
2. To configure the Scantron 2250 unit, turn it off. Hold down the End button and turn the machine on. Hold the button

down until the yellow light begins to blink. Feed the configuration form into the Scantron unit. When the form is accepted by the machine, the configuration is loaded into the machine. It should then be ready to accept data from the PC. The configuration selections on the Scantron form must match those of the COM port on the PC. See item 6 below for a typical configuration. **See the User Manual that comes with your SCANMARK unit for the current configuration instructions.**

3. From the CampusNexus Student **Setup** menu, select **Academic Records**, then select the **Scantron** tab. Be sure that the correct forms are selected for attendance and grade posting. Be sure that the correct path to the form definition files is selected. (The path and the form definition files must be on the PC's local hard drive for reliable operations.) Be sure that the correct port is selected, the one to which the Scantron machine is attached (COM2 in our example).
4. Click "Test Communication". CampusNexus Student will send the attendance form definition file to the Scantron unit as a test that the PC and the Scantron unit are properly communicating. If any negative messages are displayed, follow the procedure below to trouble shoot the problem.
5. Check the cable between the PC and the Scantron unit to be sure that both ends are securely fastened to the correct connectors. You may need help from a person knowledgeable in computer hardware to confirm that the cable is connected to the correct port on the back of the workstation PC.
6. If there is still a problem, check the settings for the COM port on the local workstation (COM2 in our example). The method for checking the settings on the COM port varies depending on the workstation operating system (Windows 98, Windows 2000, Windows NT, etc.) Ask your local network administrator for help with this check.

   For instance, if you are running Windows NT 4.0 on the workstation, there is a "Port" icon in the Control Panel window. Click the Port icon to see a list of ports on the work station. For each port, you can see the configuration.

   Typically, you want the settings to be: (the same as the Scantron configuration form.)

   - Bits per second: 9600
   - Data bits: 8
   - Parity: None
   - Stop bits: 2
   - Flow Control: None

   To check COM port settings in Windows 2000:

   Start
   Settings
   Control Panel
   System (Properties)
   Hardware Tab
   Device Manager Button
   Ports (COM1, COM2, LPT1)
7. Click "Test Communications" again on the CampusNexus Student Scantron setup form.
8. When the communication test is completed successfully (no negative messages), the system is properly configured to accept attendance and grade forms.

Example 2. Workstation is on a **Terminal Server (TS)** running CampusNexus Student on **Citrix™**.

Connect the SCANTRON machine to the local PC port as described above.

In addition, you have to Map the COM port on the TS to the one on the local machine. To do this, open the command prompt on the TS and type:

NET USE COMx: \\CLIENT\COMz:

where **x** is the port number on the Terminal Server and **z** is the port number on the local workstation.

Forms

The form identification slugs in the control boxes are used to identify the form to the CampusNexus Student process. The following table can be used to read the slugs. The distribution of slugs will agree with the form ID number printed above the control box.

Attendance Form

■	1	2	3	4	5	6	7	8	9		0	1	2	■	4	5	6	7	8	9
■	1	2	3	4	5	6	7	8	9		0	1	2	3	4	5	6	7	■	9
■	1	2	3	4	5	6	7	8	9		0	1	2	3	4	5	6	7	8	9
■	1	2	3	4	5	6	7	8	9		0	1	2	3	4	5	6	7	8	9
■	1	2	3	4	5	6	7	8	9		0	1	2	3	4	5	6	7	8	9
■	1	2	3	4	5	6	7	8	9		0	1	2	3	4	5	6	7	8	9
■	1	2	3	4	5	6	7	8	9		0	1	2	3	4	5	6	7	8	9
0	■	2	3	4	5	6	7	8	9											

Read the attendance from top to bottom on the left side, then the first two rows on the right side of the ID box. In the example above, the roster ID is 0000000138.

Final Grade Form

■	1	2	3	4	5	6	7	8	9
■	1	2	3	4	5	6	7	8	9
■	1	2	3	4	5	6	7	8	9
■	1	2	3	4	5	6	7	8	9
■	1	2	3	4	5	6	7	8	9
0	■	2	3	4	5	6	7	8	9
0	1	2	■	4	5	6	7	8	9
0	1	2	3	4	5	6	7	■	9

The final grade roster ID above is 00000138.

Scantron Daily

Please read the **Scantron Overview** topic before printing or processing SCANTRON forms with these procedures. The overview fully describes the purpose of the CampusNexus Student/Scantron interface, the environment in which it operates, and the preparations that must be made by your school to successfully post attendance and final grades using the ScanMark™ optical mark reading system.

The CampusNexus Student/SCANTRON interface must be defined under Setup > Academic Records > OMR Scanning Setup before you can perform the daily SCANTRON procedures.

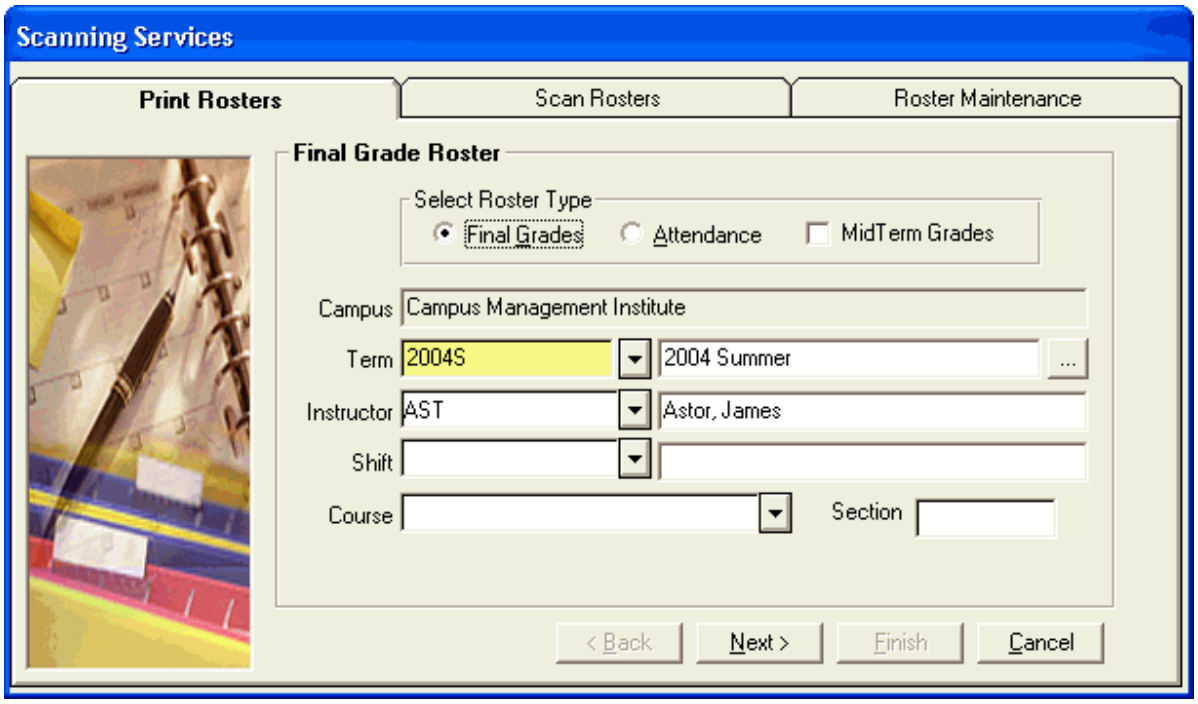
Daily SCANTRON procedures include printing of attendance and final grade forms, scanning of marked forms, and roster maintenance. Each of these functions is described in detail in a different Help topic.

Before you work with the CampusNexus Student/Scantron interface procedures, be sure you have the correct campus selected in your Session Defaults.

Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

To work with the daily SCANTRON procedures:

1. Select **Daily** > **Academic Records** > **Scanning Services**. The **Scanning Services** form is displayed.

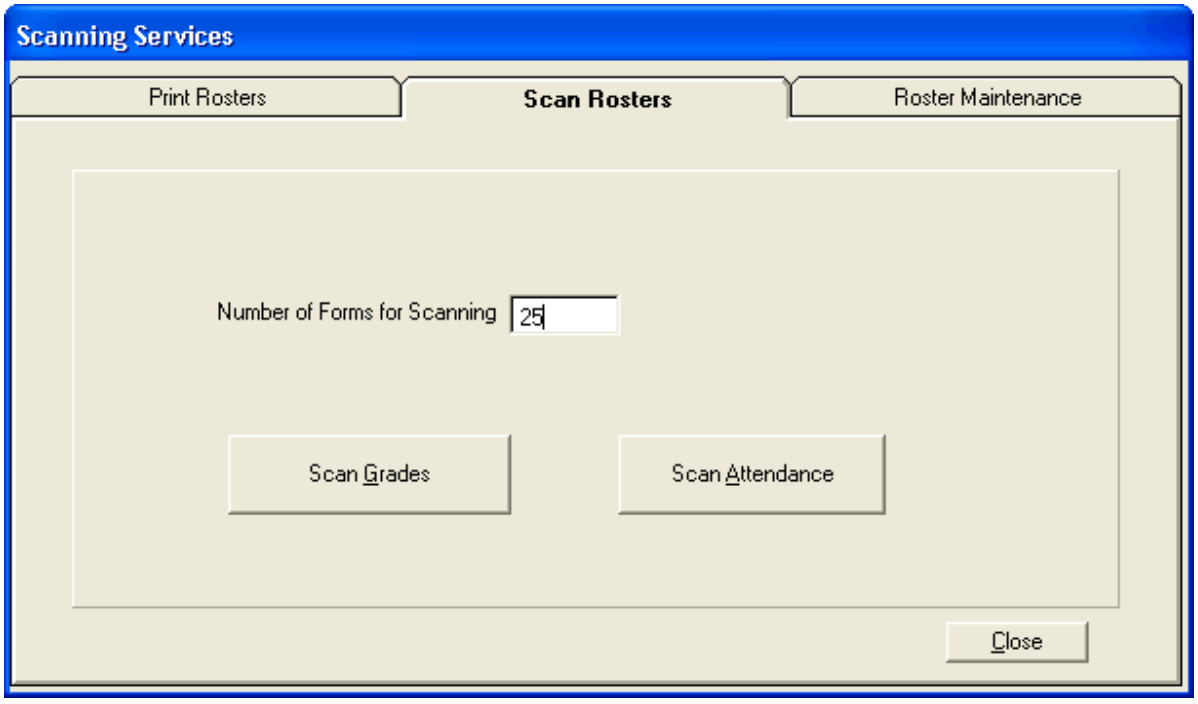


2. Click **Print Rosters** to print rosters for **final grades**, **midterm grades**, or **attendance**. You must have available in your printer, a supply of the preprinted SCANTRON forms for the rosters to be printed. While it is possible to print the rosters on plain paper for test purposes, plain paper rosters cannot be scanned by the ScanMark™ optical mark reader (OMR). Note that it is not necessary to have an OMR connected to your PC to print the rosters. They are printed on your default report printer.

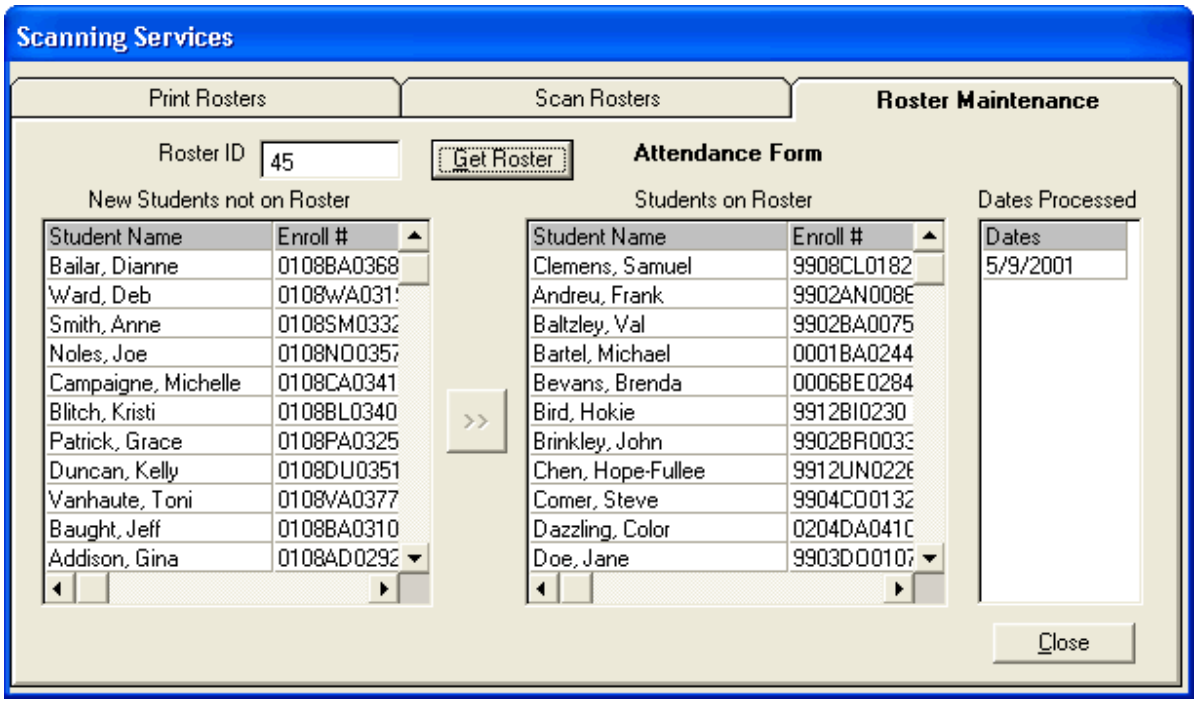
   Note: The option to print and scan a roster to record midterm grades requires the use of form number F-15173-CMC-L. In addition, the class section must have a lesson set up with a code of MIDTERM.

3. Click Scan Rosters to scan **Final Grades** rosters or **Attendance** rosters. CampusNexus Student displays the

form below. See the Scan Rosters topic for more on this form.



4. Click **Roster Maintenance** to add students to a previously printed roster. CampusNexus Student will display the form below. This form allows the class section instructor to "write in" a new student at the bottom of a previously printed roster. See the topic "Roster Maintenance" for more details on this form.



Print Scantron Rosters

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Note: Please read "Scantron Overview" for an overall review of the CampusNexus Student/SCANTRON Interface.

From this option, you can produce five reports for processing attendance and grades. These reports are intended to be printed on preprinted forms manufactured by SCANTRON Corporation™. The forms are specifically designed to be read by an optical mark reader also manufactured by SCANTRON.

Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

Attendance Rosters

See the topics "Scantron Overview" or "OMR Scanning Setup" for descriptions of the three attendance forms available for use with CampusNexus Student.

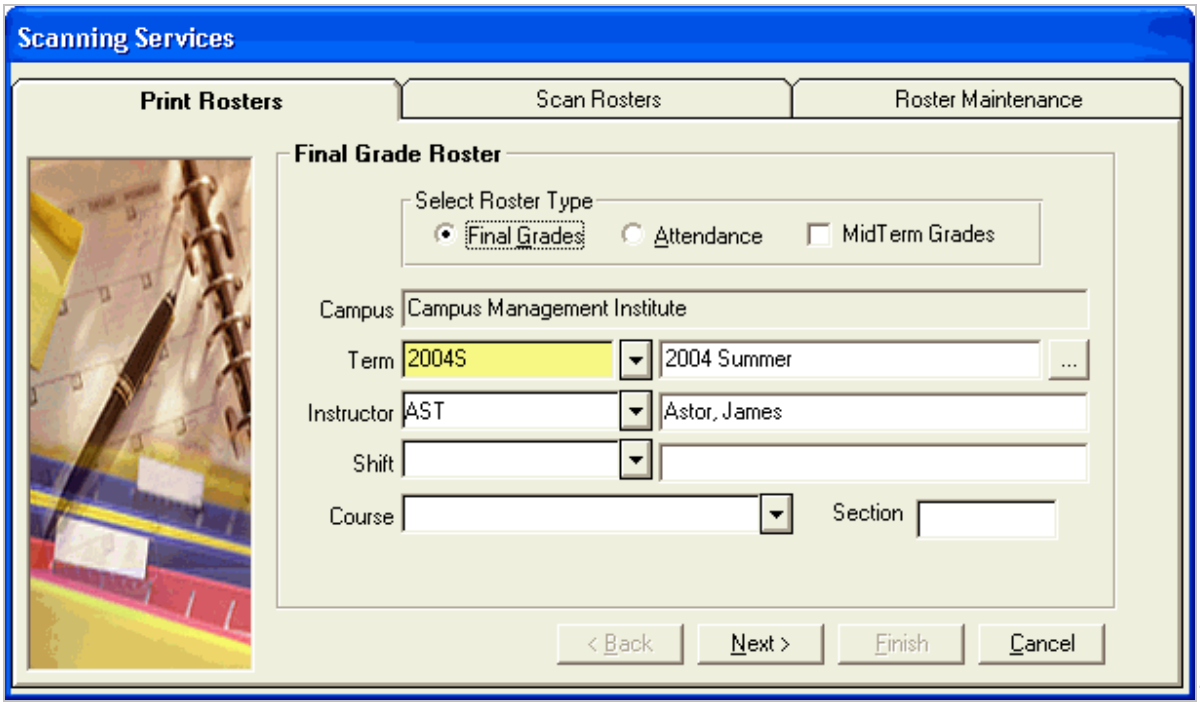
When the Attendance option is selected, the Campus defaults to the campus you are signed into. Refer to Session Defaults to change your default campus. The **Term** is a required selection. The rest of the fields on the form are included for additional selection criteria but are not required.

You cannot specify unscheduled class sections for attendance rosters. The SCANTRON attendance options are not be available for courses that meet at unscheduled days and times because there is insufficient data with which to build a SCANTRON roster. **You can print a final grade roster for an unscheduled class section.**

You must have available in your printer, a supply of the preprinted SCANTRON forms for the rosters to be printed. While it is possible to print the rosters on plain paper for test purposes, plain paper rosters cannot be scanned by the ScanMark™ optical mark reader (OMR). Note that it is not necessary to have an OMR connected to your PC to print the rosters. They are printed on your default report printer.

To print Attendance Rosters:

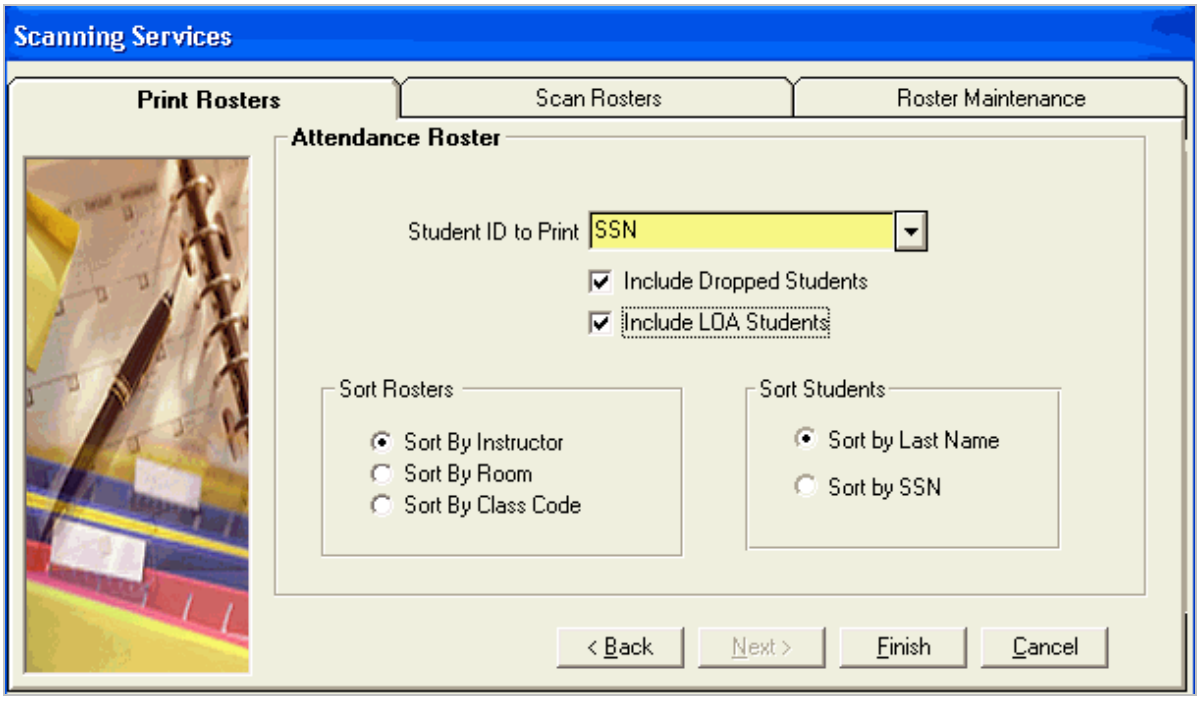
1. Navigate to **Daily** > **Academic Records> Scanning Services**. CampusNexus Student displays the Scanning Services form.
2. Click **Print Scantron Rosters**.



1

3. Select a **Roster Type**, Final Grades, Attendance, or MidTerm Grades.
4. The displayed **Campus** is your session default campus. To change the campus, you must change your session default.
5. Select the **Term** (required) for which the rosters are to be printed.

   For a campus where the floating term flag is set to Yes, Term will be replaced by Class Start Date when printing rosters for SCANTRON®. Please refer to the topic on Floating Term Class Scheduling for an overall view of this feature.
6. Other optional parameters you can select are **Instructor**, **Shift**, and **Course** (actually, class section).
7. Click **Next**



8. Select the **Student ID to Print**. The options are SSN, Student ID, Enrollment Number, and Telephone. This ID will be printed beside the students' names on the rosters to eliminate duplicates.
9. Clear or check the options for **Include Dropped Students** and **Include LOA Students**.
10. Select the order in which the rosters will be printed. The options are **Sort by Instructor**, **Sort by Room**, and **Sort by Class Code**.
11. Select the order in which the students will be sorted on the printed rosters. The options are **Sort by Last Name** and **Sort by SSN**. (Note that the SSN sort option is just that. The program does not sort on your selected Student ID to Print unless it is also SSN.)
12. Be sure the preprinted Attendance Roster forms are loaded in your default report printer.
13. Click **Finish**. The program will display the Report Selection form while it is printing the attendance rosters. When printing is finished, the program will return to page one of the Print Scantron Rosters form and will clear your previously entered parameters.
14. Click **Cancel** to close the form.

When you select the "Finish" button, CampusNexus Student gathers all records using the existing logic for standard attendance rosters. The following data items print on the SCANTRON Forms: Class Schedule ID, Instructor, Course Code, Section, Location and Time, number of records gathered, dates of attendance that will be printed on the roster.

Additionally, the Course information, Student Name and selected Student ID will be printed on the forms. The Roster ID and page number will be printed on the upper right corner of the form. If the number of students is greater than the number of rows on the form, the program will process and print the remaining students on an additional page or pages and print a new SCANTRON Roster ID and page number on each.

Machine-readable information printed on the form will be in the form of "slugs". The positions of the "slugs" are defined in the SCANTRON form definition file. They will print in the control boxes. When printed, the "slugs" must line up horizontally with the timing marks on the left margin of the form.

The student information is written to a SCANTRON Roster Detail table, this includes the SCANTRON Roster ID, Enrollment Schedule ID, the batch position of the student on the roster, and the Student ID.

Final Grade Roster

See the topics "Scantron Overview" or "OMR Scanning Setup" for descriptions of the two grade forms available for use with CampusNexus Student.

When the option to Print Final Grade Rosters is selected, the options are nearly identical to the selections when printing attendance rosters. You can, however, choose to print rosters for final grades or midterm grades. Check the Midterm Grades box if you are printing rosters for midterm grades.

Note: The option to print and scan a roster to record midterm grades requires the use of form number F-15173-CMC-L. In addition, the class section must have a lesson set up with a code of MIDTERM.

You have the same selection criteria where the campus is your default campus. The term is required, the instructor, shift, course, and section are optional. The "Next" option is like the attendance form.

You can print a final grade roster for an unscheduled class section.

The program will gather the students in the selected courses using the same logic as the final grades worksheet. If the number of students is greater than the number of rows on the form, the program will create two or more roster sheets having unique IDs and sequential page numbers for the remaining students.

A Grade Roster Detail report is printed on the preprinted SCANTRON forms. Students are listed according to your sort selection (name or SSN) on each form and the forms are printed in the print sort order you selected.

Machine-readable information printed on the form will be in the form of "slugs". The positions of the slugs are defined in the SCANTRON form definition file. They will print in the control boxes. When printed, the "slugs" must line up horizontally with the timing marks on the left margin of the form.

The Roster ID and page number will be printed in the upper right corner of the form.

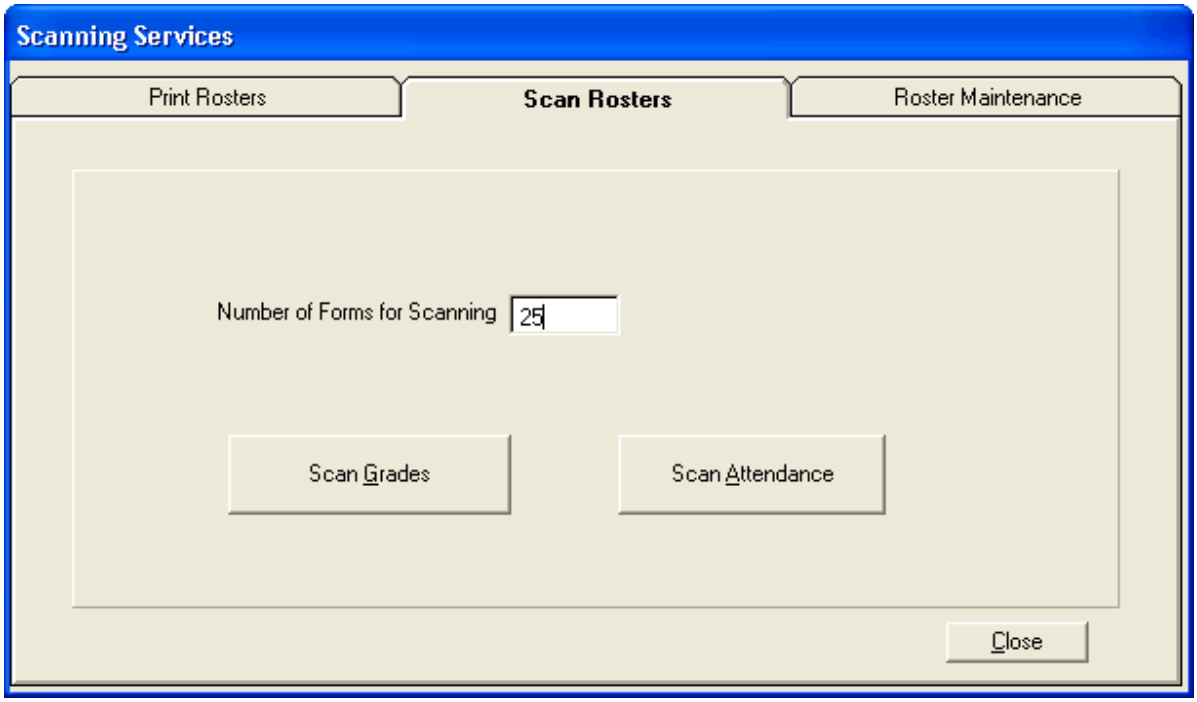
Note: Once a final grade has been posted for a student in a class section (for instance, a grade is manually posted), that student will no longer appear on a subsequently printed final grade roster for the class section.

Scan Rosters

A class roster form, attendance or grades, can be reprinted if necessary (a form is lost in distribution, for example). If two forms are submitted covering the same class section meeting dates or the same class section grades, only the first form submitted will count. CampusNexus Student will reject subsequent submittal.

To scan attendance or final grade forms:

1. Navigate to **Daily > Academic Records > Scantron**. CampusNexus Student displays the Scanning Services form.
2. Click the **Scan Rosters** tab.

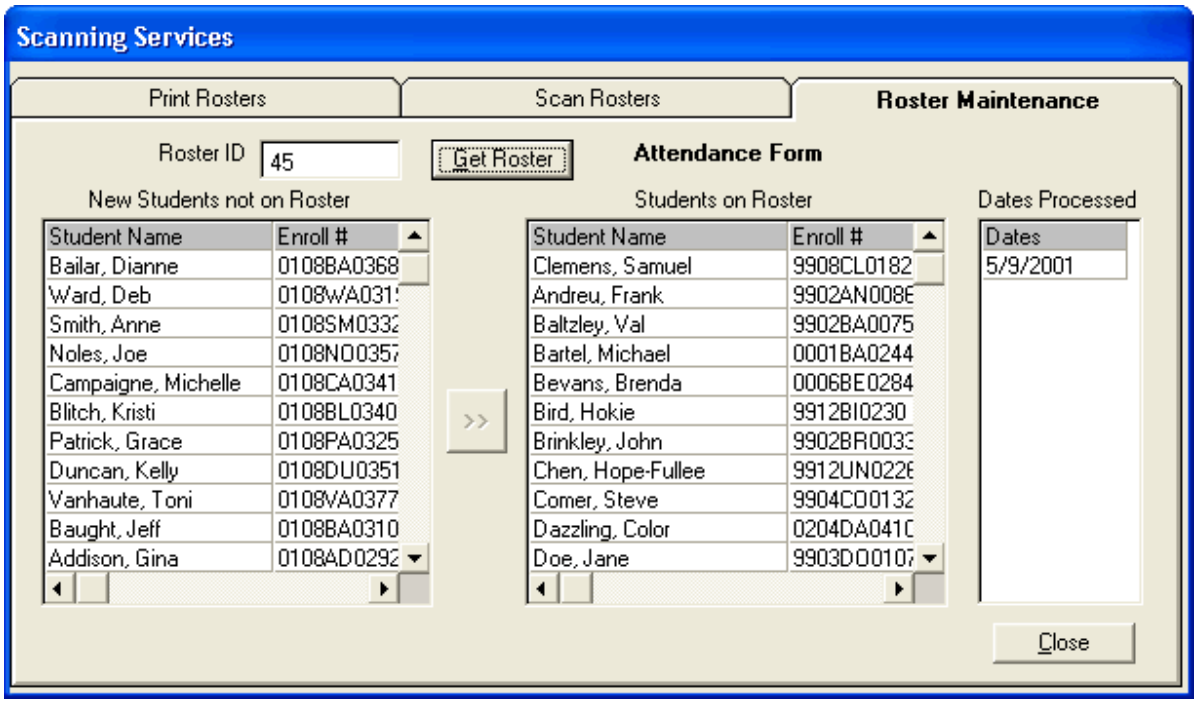


3. Enter the **Number of Forms for Scanning**. This is an optional field to help you control the number of forms you are passing through the OMR.
4. Click **Scan Final Grades**or **Scan Attendance**. CampusNexus Student sends the **form definition file**to the OMR. Depending on whether you selected attendance or grades, CampusNexus Student uses your form selection to send the correct form definition file to the SCANTRON machine. (Form definition files have a file name extension of .800.) If the OMR confirms to CampusNexus Student that it has received the file, the program will display a message that the system is ready to process forms.
5. Click **OK**to continue. CampusNexus Student waits for the return of the text string(s) from the OMR. The machine will create a text string based on the format defined in the form definition file. This data will then be interpreted and imported into CampusNexus Student.
6. Feed the attendance or final grade forms through the OMR. The forms can be fed to the OMR in any order. When CampusNexus Student detects that you have scanned the number of forms you entered in step 3 above, it will stop the scanning process. Alternatively, if you do not enter the number of forms to be scanned, you can scan as many forms as you like and press the **End** button on the OMR when all forms have been scanned. While the forms are being scanned and processed, CampusNexus Student displays a message.

CampusNexus Student processes each form completely after it is scanned. The data from the form is applied to the records of the listed students before the next form is read. If the Scantron OMR rejects a form, none of the data on that form is applied to the CampusNexus Student database. See "Rejected Forms" below.

CampusNexus Student and the OMR can detect a number of abnormal conditions while you are scanning forms. Some examples are:

- Scanner Timed Out -- you did not scan a form within 90 seconds of the start of the scanning process or since the last form was scanned.



- A form has been previously scanned. Grade forms can only be successfully scanned once. Attendance forms can be scanned a maximum of once for each date on the form. When all dates are scanned, any subsequent scan will be rejected by CampusNexus Student.
- The OMR can reject a form that is not properly marked. Forms rejected by the OMR do not count as scanned. You as the operator may be able to correct a form and rescan it. Otherwise, you may have to print a new form for the same class section and period of time and transfer the marks to the new form. Another solution for a form that cannot be read by the OMR is to post the data via the batch posting procedures in CampusNexus Student.
- No rosters were processed. You started the processing but did not successfully scan any forms.

7. When the scanning of forms finishes normally, CampusNexus Student displays a list of the Roster IDs scanned. A "Processing Complete" message box is displayed. When you select **OK**, CampusNexus Student may display a second message box listing rosters that were not processed because they had been previously scanned. Click **OK** to close this message also.
8. Click **Close** to close the form.

Rejected Forms

Forms that are rejected by the SCANTRON unit must be corrected and resubmitted or posted manually. Rejected forms are not considered as processed by CampusNexus Student. Therefore, if the instructor's intention can be determined and corrected by

the SCANTRON operator, the form can be resubmitted. If the form is so damaged physically that the SCANTRON unit cannot process it, you must print and mark another roster. Alternatively, you can manually post the data from the form through the CampusNexus Student batch attendance or batch grade posting procedures.

Scan Attendance

CampusNexus Student reads the incoming file, first by identifying the SCANTRON Roster ID. Using the SCANTRON Roster table, it then identifies the Class Schedule ID and matches the SCANTRON Roster Dates table to determine which dates on the roster need to be updated.

Using the SCANTRON Roster Detail table, the program updates the attendance records for the selected students. The attendance update logic is identical to the existing method of batch posting attendance. After posting the attendance data, the program updates the SCANTRON Roster Dates Scan Flag to true for the dates posted. If all date fields for the selected SCANTRON Roster ID have the scan flag set to True, the SCANTRON Roster Status flag is updated to "C - Complete".

Note: CampusNexus Student does not distinguish the **time of day** when posting attendance. It only looks at the dates. For example, if an instructor records "attendance" on a SCANTRON form Friday at 8:00 A.M. for a class that meets Friday at 1:00 P.M., turns it in at 9:00 A.M., and leaves for the weekend, and the form is processed Friday at 10:00 A.M. CampusNexus Student looks only at the date in the Friday column on the form, compares it to the current date, and accepts the "future" attendance.

Scan Final Grades

CampusNexus Student reads the file, first identifying the SCANTRON Roster ID. Using the SCANTRON Roster table, it then identifies the Class Schedule ID and the students on the rosters using the SCANTRON Roster Detail table. It updates the appropriate records in the Class Schedule table and Enrollment Schedule table to finalize the grade posting. CampusNexus Student uses the same logic as the Daily/Academic Records/Final Grades batch entry form uses. No numeric grades will be recorded. Once the update is complete, a "Final Grade Processing Complete" message is displayed. Once a final grade form has been scanned, scanning it again has no effect.

Scantron Roster Maintenance

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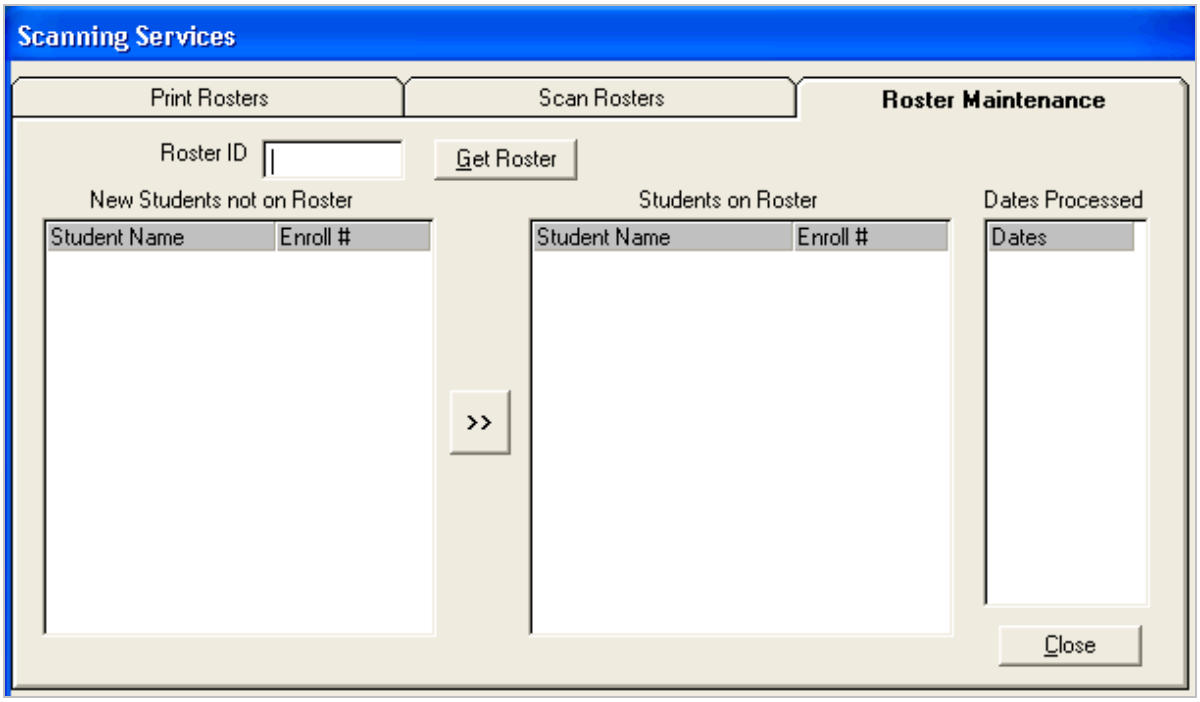
Note: Please read Scantron Overview for an overall review of the CampusNexus Student/SCANTRON Interface.

This option shows the students on the **previously printed roster** in the list on the right side of the form and new students added to the class section after the roster was printed on the left side of the form. If the roster was not completely processed (Status C), you can add the new students to the roster. A message box with the student position on the form is displayed. If the roster is for Attendance (Form Type A), a list of dates already processed for the roster will also be displayed on the Roster Maintenance tab. Dates Processed does not apply to Final Grades forms (Form Type G).

To work with the Scantron Roster Maintenance feature:

1. Navigate to **Daily > Academic Records > Scanning**. The Scanning Services form is displayed.
2. Click the **Roster Maintenance** tab.



3. Enter a Scantron Roster ID. You can get roster IDs from the top of a printed roster form or from the Roster Status Report. It is not necessary to enter leading zeros from the roster ID.
4. Click **Get Roster**. CampusNexus Student displays a list of the **Students on Roster**, **New Students not on Roster** and **Dates Processed**. Dates Processed applies to attendance rosters only. If the roster ID you enter has been completely processed, a message is displayed.
5. To add a new student to the roster, select the student in the **New Students not on Roster** column and click the move button (>>) . The selected student will be moved to the bottom of the Students on Roster column. This represents the position in which the student can be "written in" on the previously printed roster.

   It is important to maintain the order in which new students are added to the roster when hand-writing them on the previously printed roster. They must be added on the next consecutive line(s) of the form. CampusNexus Student depends on the position of the students on the roster to properly read the marks and update their records. The

instructor or Scantron operator can "write in" the student on a previously printed roster. The student's name must appear in the order shown in the Roster Maintenance list. In other words, the first student added must appear on the first line below the printed list, the second student added must appear on the next line, and so on.

Note that new students in a class section will be automatically added to any future rosters that are printed.

6. Click **Close** to close the form.

Troubleshooting Scantron

Once it is installed and configured properly, the SCANMARK Optical Mark Reader (OMR) will provide an efficient means of recording attendance and grades. Here, we are offering some suggestions of things to look for if problems arise. For specific details concerning your OMR, please consult your SCANTRON representative or service technician.

If these tips do not solve your problem, please reread the other Scantron topics in the Help system. If that doesn't help, contact Support (1-800-483-9106).

Scantron Trouble Symptoms and Solutions

Symptoms	Solutions	Comments
The Power light is not lit on the SCANMARK OMR.	Make sure the power connector is fully inserted on the back of the OMR and the plug is fully inserted in the power source (a wall outlet or, preferably, a surge protector). Turn on the OMR. The power switch is on the back of the unit. Check for power to the outlet (circuit breaker, wall switch, etc.)	

Symptoms	Solutions	Comments
Communication cannot be established between the PC and the SCANMARK OMR.	In CampusNexus Student, go to Setup > Academic Records > Scantron. Click the Test Communications button to determine if communication has been established between the PC and the OMR. If the result is negative, check the settings below. Confirm that you are using the proper null modem cable to connect the two units. Refer to the SCANMARK User Guide for information about the correct cable. Make sure the cable is connected securely to the correct COM port on the PC (there are usually two ports) and to the correct jack on the back of the SCANMARK unit (there are two connection points. Consult the User Guide to locate the correct one.) Confirm that the communications protocol for the COM port is the same as that of the OMR unit. We recommend that you use the factory default settings of the OMR: • Baud rate: 9600 • Word length: 8 Bits • Stop bits: 2 Bits • Parity: None • Clear-to-Send (CTS): Off • Handshaking: None • Command Prefix: ASCII <ESC> (decimal 27) • End-of-Form: ASCII <CR> (decimal 13) • Threshold: Pencil - 42 (Ink - 30) • Difference: Pencil - 57 (Ink - 69) If you need to reset the OMR to its default settings, follow the directions in the SCANMARK User Guide. You will need to have available a properly marked configuration form to reset the OMR. If your school is running CampusNexus Student via Citrix on a terminal server, remember that you must command the Citrix server to map the server's COM port to the PC's COM port. Ask your system administrator to help you with this. On the server, run the command: **NET USE COMx: \\CLIENT\COMz** where **x** is the port number on the Terminal Server and	If the communications test is still unsuccessful after these checks, call your Scantron technician. Whether your PC can communicate with the OMR has nothing to do with CampusNexus Student. If the units can talk to each other, the CampusNexus Student Scantron-related procedures will work.

Symptoms	Solutions	Comments
	z is the port number on the local PC. Refer to the topic titled "Scantron Overview" for more about checking the PC's COM port settings for the Windows operating system you are using.	

Symptoms	Solutions	Comments
The OMR is not reading the forms correctly.	Always buy your forms from SCANTRON Corporation. The forms are very precisely designed and manufactured for use with OMRs. Do not change the design of the forms by altering the location of the rows, columns, and "bubbles" on the forms. (About the only thing you can change is the addition of a school logo in a non-readable area of the form, perhaps at the top or on the back. You can change the ink color on the forms as long as you consult with SCANTRON and use their recommended inks. Note that your school name and the class section identification data is printed at the top of the form by CampusNexus Student. Instructors should use a Number 2 pencil to mark the forms. Other marking devices such as ball point pens felt tip pens are not as reliable. A pencil mark can be erased and remarked or cleaned up a little to make an otherwise unreadable form readable. Use only a good-quality **laser printer** to print the attendance or grade rosters. Ink-jet printers do not have sufficiently reliable paper control to print scannable rosters. Confirm that the "slugs" identifying the roster number are centered (or very nearly centered) in the bubbles at the top of the form. The OMR can tolerate a little "slop" when the slugs are printed on the form but not much. For instance, a slug that falls between two bubbles will result in a "Zone Error" message on the OMR's LED display. This is not a CampusNexus Student problem, it is a Printer problem. Find a printer that can accurately print the slugs in the bubbles. The slugs that identify the roster number must also be aligned horizontally with the timing marks on the left edge of the form. Again, a very small margin of error is acceptable in the horizontal alignment of the slugs and timing marks. There can be no vertical overlapping of slugs between bubbles. Periodically clean the read head and paper path on the OMR. Refer to the SCANMARK User Guide for cleaning instructions. Check for pieces of forms in the paper path of the OMR. Forms that constantly jam in the paper path of the OMR indicate that the rollers may be out of alignment. Call the Scantron Service Technician.	

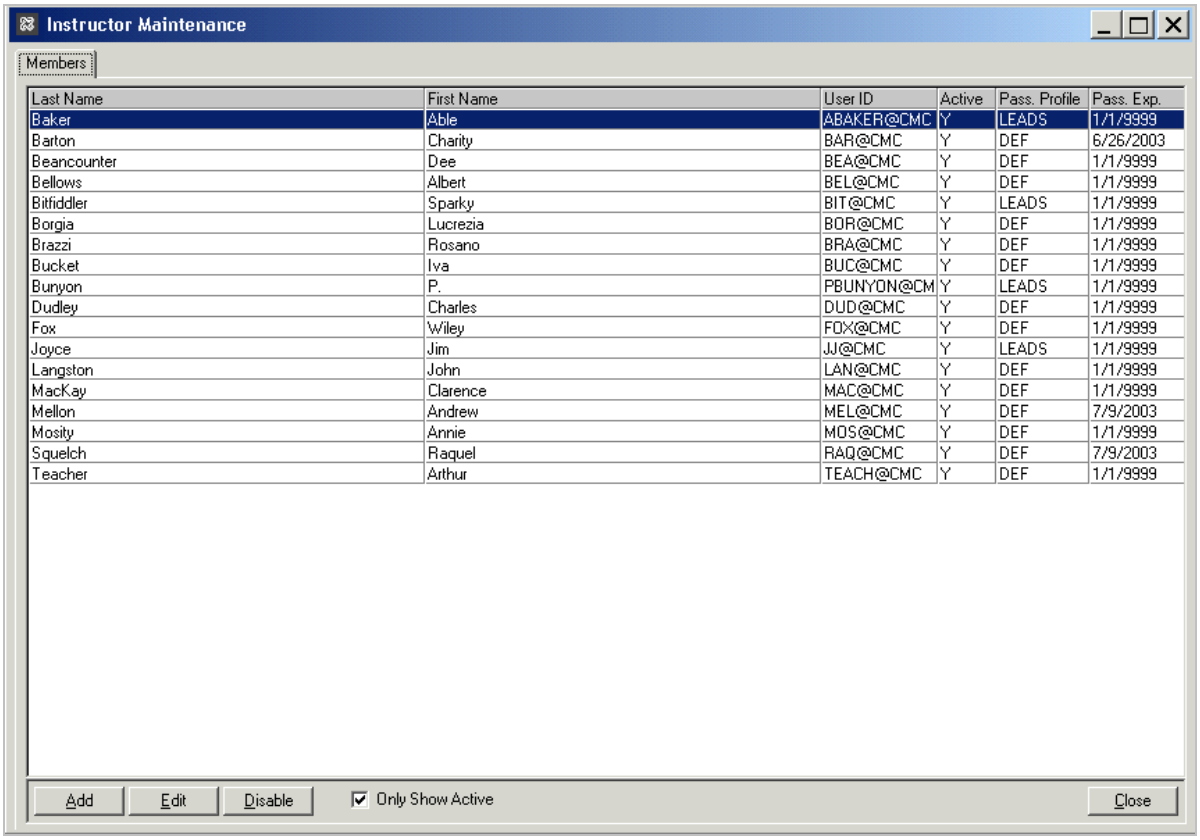
Symptoms	Solutions	Comments
Other form-related problems	Be sure you are scanning the forms that go with the form definition file you downloaded to the OMR. For instance, do not attempt to scan attendance forms after having downloaded the grade form definition file and vise versa. Be sure you are scanning the correct form according to the setup parameters in CampusNexus Student. Damaged forms usually do not scan properly. If a roster is torn, wrinkled, folded, stapled, or otherwise not in pristine condition, you may have to bag it and post the data manually in CampusNexus Student. See Daily > Academic Records > Attendance > Record Attendance. Do not allow any extraneous notes or markings within the range of the timing marks on the form. Users should not make notations on the forms. Anyway, the machine can't read them. Check for double marks in the same column for the same student, for example, a present and an absent mark on the same day for the same student. Check for light marks that may not pass the "threshold" of "darkness" and thus cannot be recognized as a real mark.	

Symptoms	Solutions	Comments
CampusNexus Student Setup Problems	Please read the setup topic titled "OMR Scanning Setup". Be sure the five form definition files are in the folder indicated in "Path to Scantron Files". Be sure the COM Port indicated in "Scantron Com Port" is the one to which the cable from the OMR is connected. If you are using form 15173, be sure that the correct grade scale has been selected and that the grade codes have been selected before scanning the grade forms. If you are trying to scan grade forms for midterm grades, be sure that each class section has a lesson defined with a code of MIDTERM. See Daily > Academic Records > Schedule Classes > Lessons. If you are using form 10873 or form 15174 for attendance posting, be sure to indicate a tardy percentage. If you are using form 15175 for attendance posting, be sure to define the meanings of the 10 code bubbles. In other words, Code (bubble) 1 is Present, Code 2 is Absent, Code 3 is Excused, Code 4 is 10 percent tardy, and so on.	The "Path to Scantron files" must be on the PC to which the SCANTRON optical mark reader (OMR) is attached. The scanning process does not work reliably when these files are transferred during scanning from a network server through the PC to the OMR. It is a "timing" issue in which the OMR frequently times out before the file transfer from the server is completed. The SCANTRON files are installed at `C:\Program Files\CMC\CampusNexus Student`. (Note that this implies that you can attach the Scantron unit to any PC running CampusNexus Student.) You can use this path or you can copy the files to a separate SCANTRON directory, for example, `C:\Scantron`. The attendance and grade form definition files are static and do not change during processing.
Other Problems	Please reread the other Scantron topics, including Scantron Overview, Scantron, Print Scantron Rosters, Scan Rosters, Roster Maintenance, and OMR Scanning Setup.	If you cannot find an answer in the documentation, call or email Support (1-800-483-9106). support@campusmgmt.com

Instructor Maintenance

The daily maintenance function enables staff members at campus levels to add new instructors, and update information for existing staff members.

1. Navigate to **Daily > Academic Records > Instructor Maintenance** path. The Instructor Maintenance form is displayed.



Last Name	First Name	User ID	Active	Pass. Profile	Pass. Exp.
Baker	Able	ABAKER@CMC	Y	LEADS	1/1/9999
Barton	Charity	BAR@CMC	Y	DEF	6/26/2003
Beancounter	Dee	BEA@CMC	Y	DEF	1/1/9999
Bellows	Albert	BEL@CMC	Y	DEF	1/1/9999
Bitfiddler	Sparky	BIT@CMC	Y	LEADS	1/1/9999
Borgia	Lucrezia	BOR@CMC	Y	DEF	1/1/9999
Brazzi	Rosano	BRA@CMC	Y	DEF	1/1/9999
Bucket	Iva	BUC@CMC	Y	DEF	1/1/9999
Bunyon	P.	PBUNYON@CM	Y	LEADS	1/1/9999
Dudley	Charles	DUD@CMC	Y	DEF	1/1/9999
Fox	Wiley	FOX@CMC	Y	DEF	1/1/9999
Joyce	Jim	JJ@CMC	Y	LEADS	1/1/9999
Langston	John	LAN@CMC	Y	DEF	1/1/9999
MacKay	Clarence	MAC@CMC	Y	DEF	1/1/9999
Mellon	Andrew	MEL@CMC	Y	DEF	7/9/2003
Mosity	Annie	MOS@CMC	Y	DEF	1/1/9999
Squelch	Raquel	RAQ@CMC	Y	DEF	7/9/2003
Teacher	Arthur	TEACH@CMC	Y	DEF	1/1/9999

2. Upon creation of a staff member through the Daily menu, you will be prompted to enter the remaining user information, such as name, address, department, etc. All other required fields are gathered from the template and written to the new staff record when added.
3. Select the **Only Show Active** check box to display only active Instructors.
4. Select an Instructor and click **Disable** to deactivate an Instructor or click **Enable** to activate a staff member that has been deactivated.
5. Select **Add** to add a new staff member, or select existing staff members and click **Edit** to modify their information.

   Note: Since CampusNexus Student allows users to make staff member configuration changes through the Instructor Maintenance form, all changes will be audited. Audit verifications are handled at the database level only and performed through appropriate SQL queries.
6. The **Members** tab displays staff members associated with the Instructor Group.
7. When you select a staff member to edit, the Staff Information screen is displayed. The information on the Home

Address tab, Work Address tab, and HR Info tab will be fully displayed.

8. The User Info tab will allow for the Campus Group association, and the initial password creation (upon Edit, password options are hidden).
9. The Groups tab has the Admission Rep default group as a permanently selected group for the staff member. Additional groups can be assigned to the new staff member if the groups have been identified as Admission Rep groups within the new staff group attribute. The user may select to assign a Setup Template from the templates associated with the selected staff groups. The Setup Template defines the user-level permissions and Contact Manager policy for the staff member being created.
10. Click Picture to access the Instructors picture.
11. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Associate Instructors to Courses

Institutions can associate instructors with a specific course (for example, ENG101), course code prefixes that begin with, for example, ' ENG', and/or courses based on Course Level (for example, Undergraduate 300/400 Level). Users can designate a Staff member per campus to be the course owner. The selected person does not have to be a Staff member of type Instructor. Refer also to Instructor Maintenance, Staff Group, Course List and Schedule Classes.

Staff members or staff groups can be given the capability to override the instructor course association. Staff member override capability is configured in the User Info Academic Records - sub tab, while staff groups are configured through the Setup Template. If the override instructor course association option is enabled, then during scheduling classes, that particular staff will have all the instructors (based on current campus) available for selection, irrespective of the fact that an Instructor/Course association is defined.

Institutions can define available Instructors for a course at a campus level, by designating Instructors to courses by any or combination of course code (for example, ENG, MTH, etc.), course number for example, 100, 200) and course level (for example, Graduate, Undergrad, All).

The following rules and features apply:

- One or multiple instructors can be associated with the courses.
- Only one Instructor can be defined as the 'Owner' of a course.
- Any association between any instructor/course can be deleted or made inactive.
- When you schedule a class, only Instructors associated with the course will appear for the selected course.
- If Instructors have not been assigned to a course, when setting a schedule for the course, CampusNexus Student defaults to 'All' instructors.
- A report is provided for Instructor/Course allowable assignments.

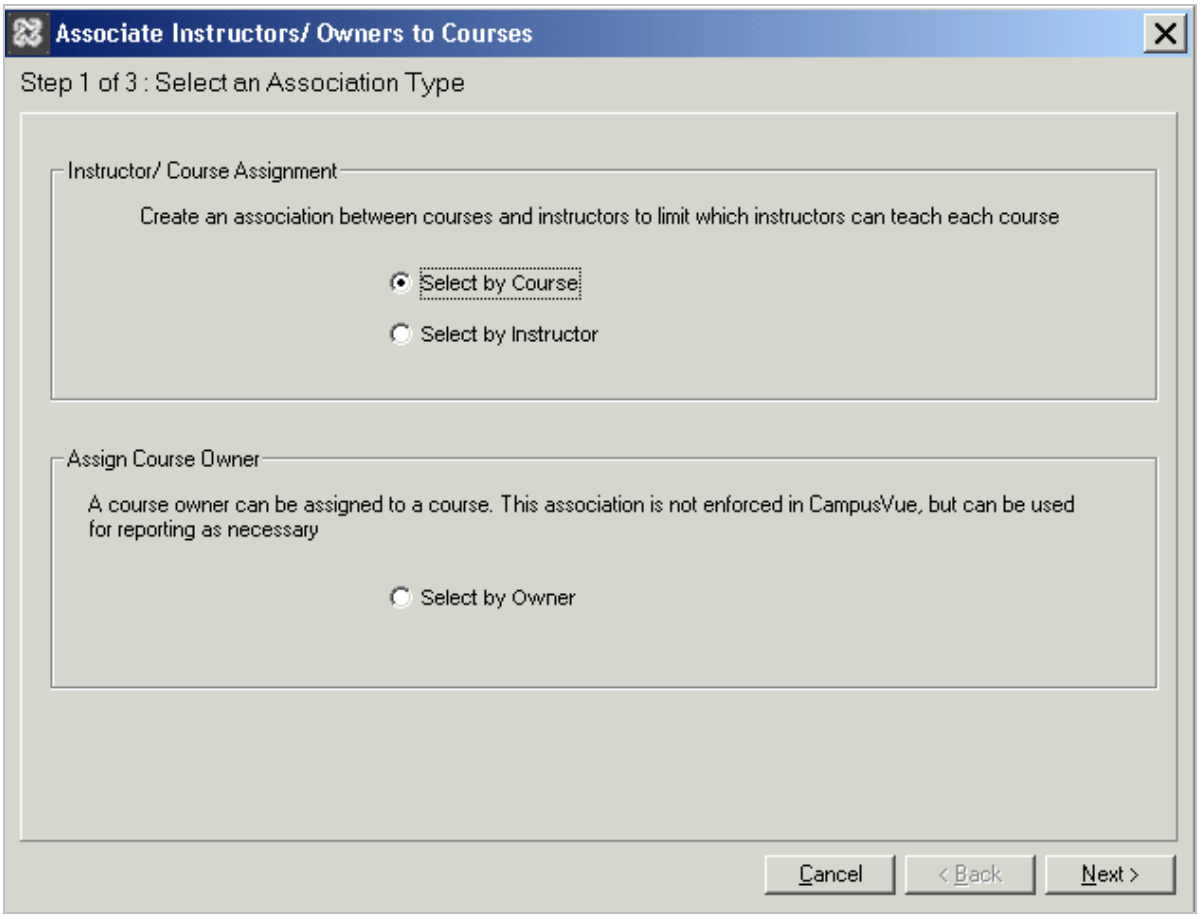
To associate instructors to courses

1. Navigate to **Daily > Academic Records > Associate Instructors to Courses**. The Associate Instructors to Courses wizard is displayed.

   CampusNexus Student provides three options for associating instructors/owners with courses: by Course, Instructor, or Owner.

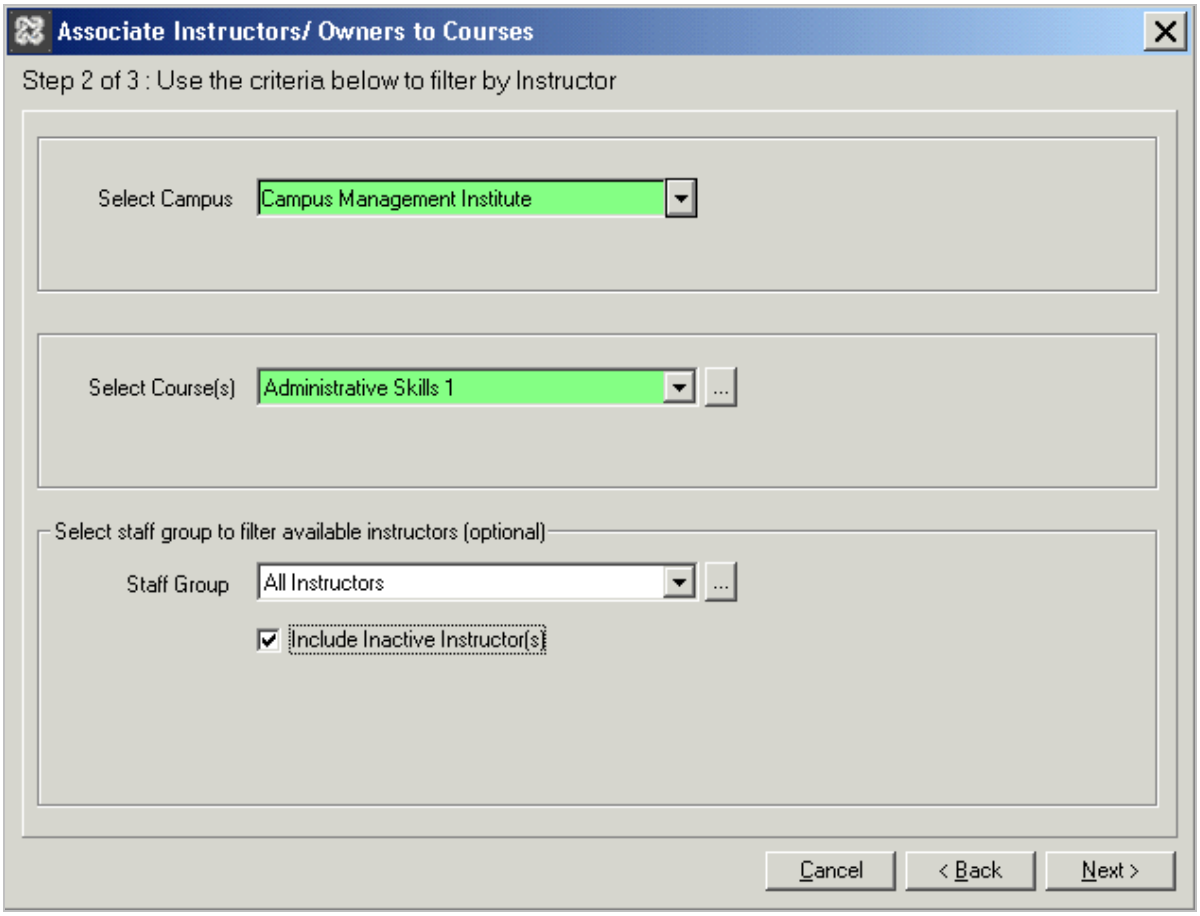
Step 1 of 3: Select Association Type:

If the override option is selected, then during scheduling classes, that particular staff member will have all the instructors (based on current campus) available for selection irrespective of the fact that an Instructor/Course association is defined.

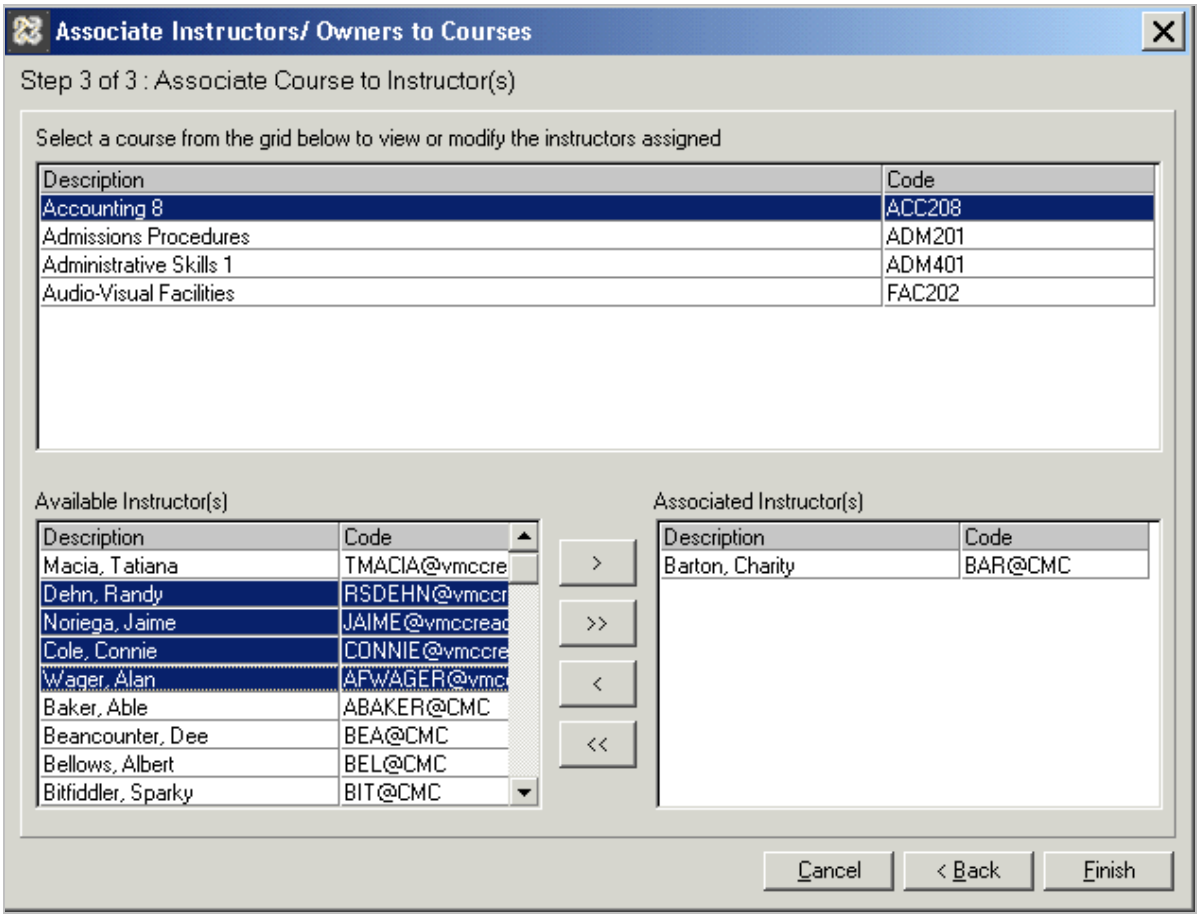

Associate Instructors/ Owners to Courses
Step 1 of 3 : Select an Association Type
Instructor/ Course Assignment
Create an association between courses and instructors to limit which instructors can teach each course
Select by Course
Select by Instructor
Assign Course Owner
A course owner can be assigned to a course. This association is not enforced in CampusVue, but can be used for reporting as necessary
Select by Owner
Cancel
< Back
Next >

Select by Course

1. Choose **Select by Course** and click **Next**. Step 2 of 3: Use the criteria below to filter by Instructor is displayed.



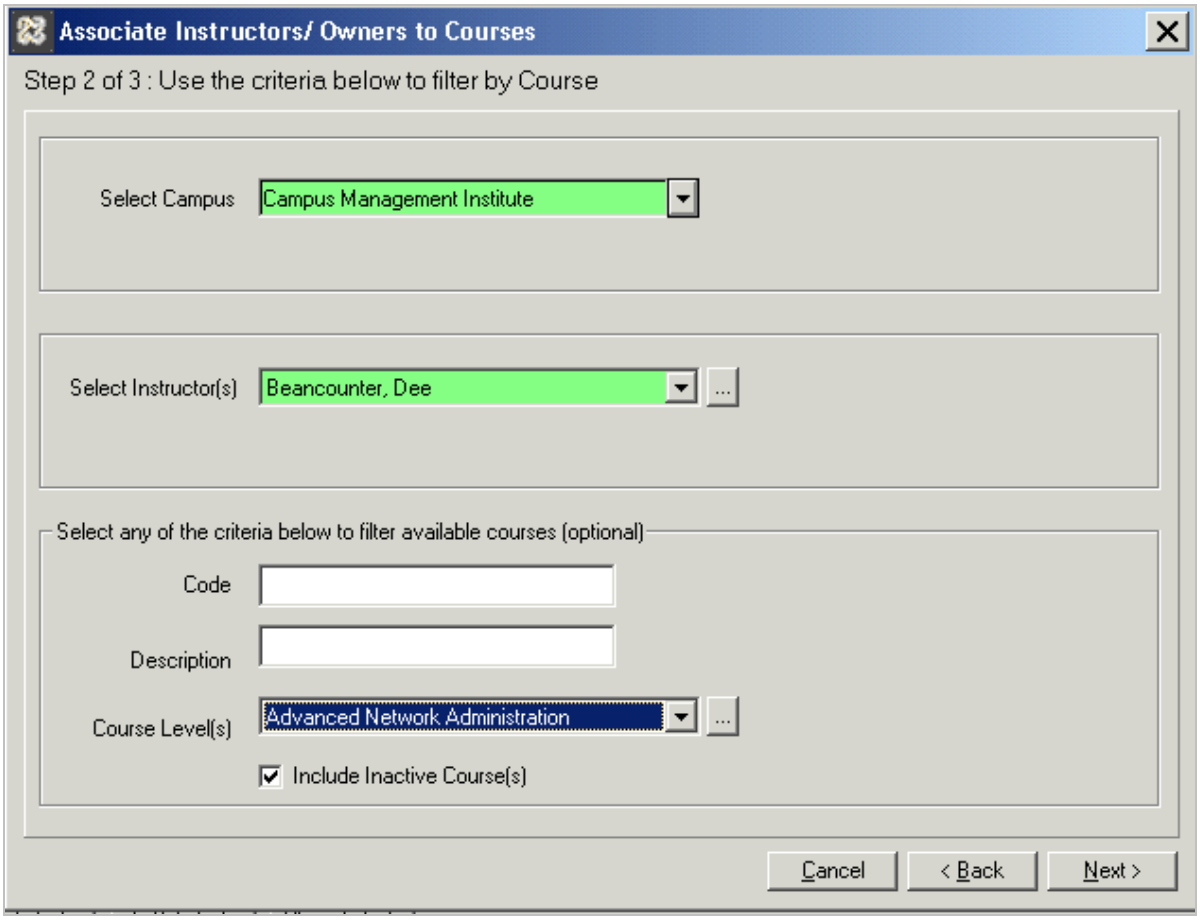
2. Select a **Campus**.
3. Select a **Course** from the list or click ... to select multiple courses.
4. Select a **Staff Group** from the list or click ... to select multiple staff groups.
5. When the **Include Inactive Instructor(s)** option is selected, inactive instructors may be selected from the **Staff Group** list.
6. Click **Next**. Step 3 of 3: Associate Course to Instructor(s) is displayed.



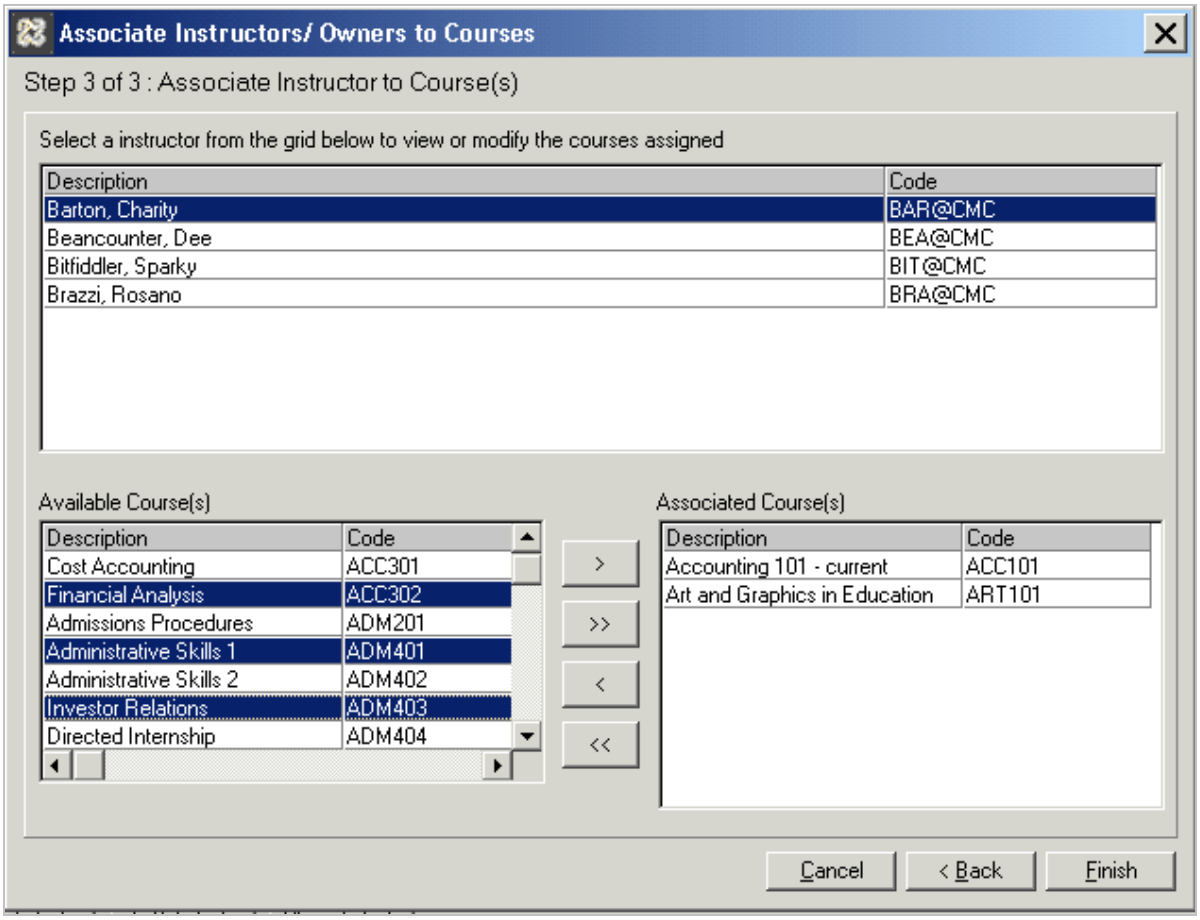
7. Select a **Course** from the top portion of the screen.
8. From the Available Instructor(s) list, select an instructor and then click the **>** arrow, or click the **>>** arrow to move all instructors from the **Available Instructor(s)** list to the **Associated Instructor(s)** list. You can also use the **Shift + down arrow key** to highlight several instructors at once and then click the **>>** arrow to move available instructors to the associated instructors.
9. Click **Finish** to associate the selected Course(s) with the selected Instructor(s).

Select by Instructor

1. Navigate to **Daily > Academic Records > Associate Instructors to Courses**. The Associate Instructors to Courses wizard is displayed on Step 1 of 3: Select Association Type.
2. Choose **Select by Instructor** and click **Next**. Step 2 of 3: Use the criteria below to filter by Course is displayed.



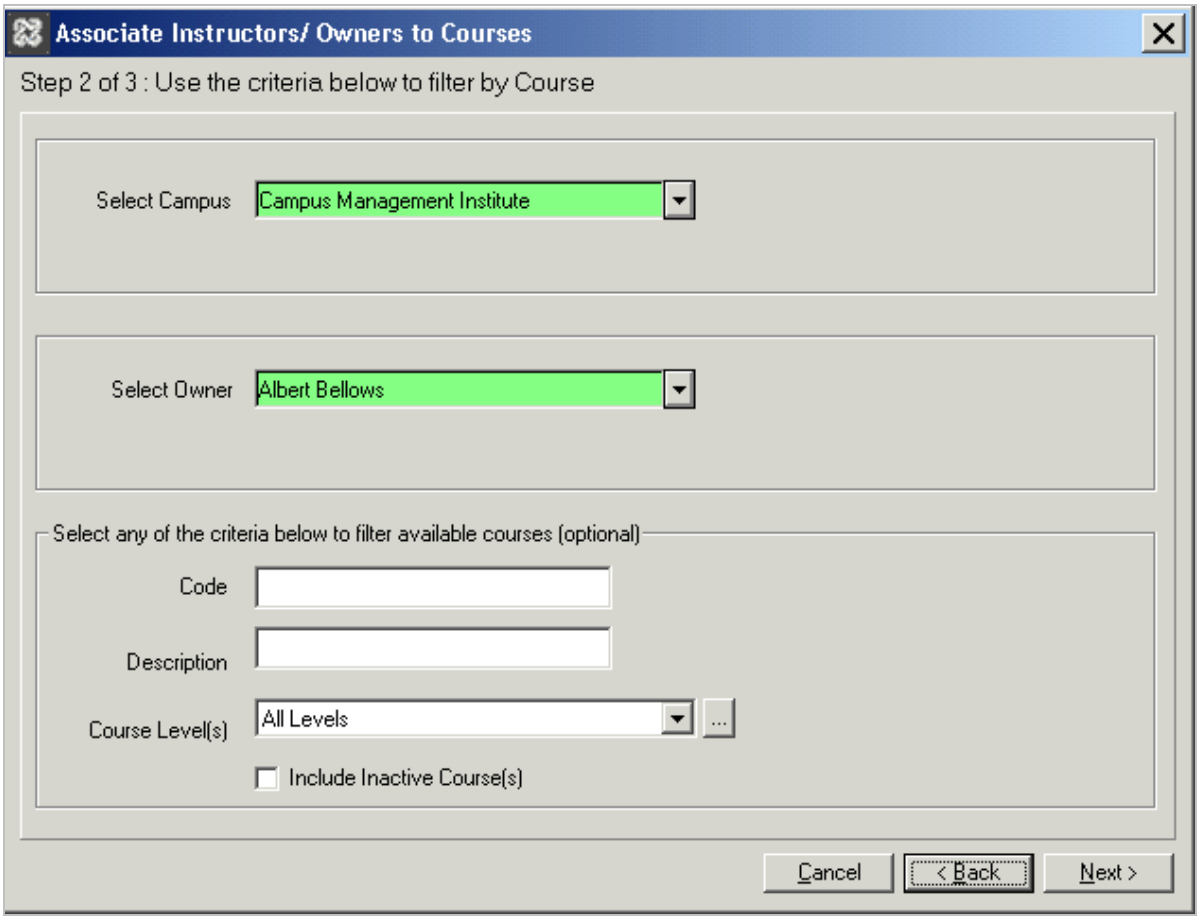
3. Select a **Campus**.
4. Select an **Instructor** or click ... to select multiple instructors.
5. Select additional criteria to filter available courses. The optional fields are **Code**, **Description**, and **Course Level (s)**.
6. Select a **Course Level** or click ... to select multiple courses. Select the course that you would like CampusNexus Student to return in the search results in Step 3.
7. Click **Next**. Step 3 of 3: Associate Instructor to Course(s) is displayed.



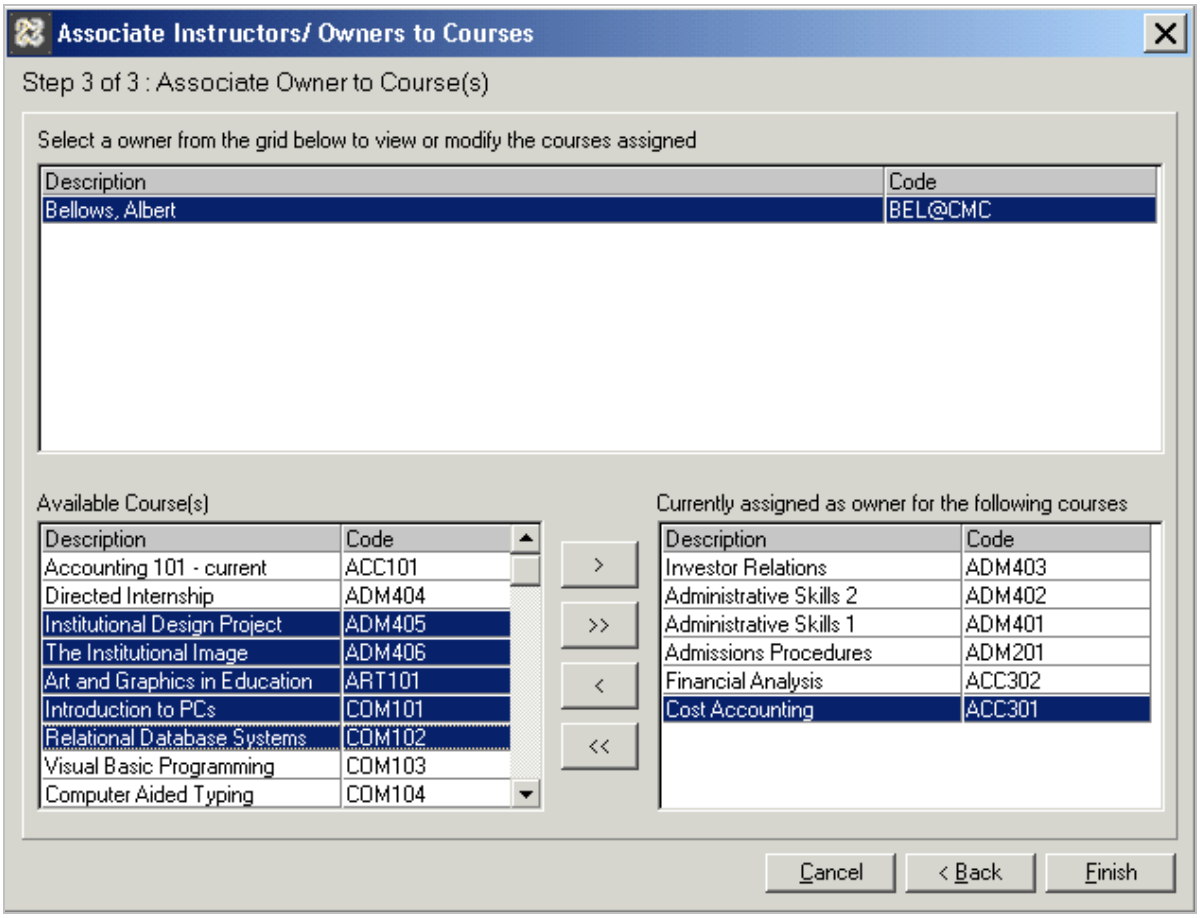
8. Select an **Instructor** from the top portion of the screen.
9. From the Available Course(s) list, select a course, and click the **>** arrow, or click the **>>** arrow to move all courses from the **Available Course(s)** list to the **Associated Course(s)** list. You can also use the **Shift + down arrow key** to highlight several courses at once and then click the **>>** arrow to move available courses to the associated instructors.
10. Click **Finish** to associate the selected Instructor(s) with the selected Course(s).

Select By Owner

1. Navigate to **Daily > Academic Records > Associate Instructors to Courses**. The Associate Instructors to Courses wizard is displayed on Step 1 of 3: Select Association Type.
2. Choose **Select by Owner** and click **Next**. Step 2 of 3: Use the criteria below to filter by Course is displayed.



3. Select a **Campus**.
4. Select an **Owner**.



5. From the Available Course(s) list, select a course, and click the **>** arrow, or click the **>>** arrow to move all courses from the **Available Course(s)** list to the **Associated Course(s)** list. You can also use the **Shift + down arrow key** to highlight several courses at once and then click the **>>** arrow to move available courses to the associated owner.
6. Click **Finish** to associate the selected Owner with the selected Course(s).

Status Change in Academic Records

Academic Records Department staff can manually change the status of a student. The choices of which statuses can be changed to which other statuses are controlled by the system administrator through the Status Code Setup procedures under the Setup menu.

CampusNexus Student checks the number of days allowed for status changes in the campus setup. If you enter a date that is older than the number of days allowed for the campus, a message is displayed. If you have "Override" permission, the status change is allowed. If you have "No Override" permission, the status change is not allowed until you enter a valid date.

CampusNexus Student allows only one status record for a date. If there is already a status record for a date, you must update the status rather than writing a new record.

You can access the Status Change form multiple paths, for example:

- View > Academic Records > Enrollment > Status History (button) > Change (button)
- Daily > Academic Records > Batch Status Change
- Daily > Academic Records > Status Change

Whether the status of the individual student is being changed or multiple students in a batch, if the status is changed to Drop, CampusNexus Student drops current classes. CampusNexus Student checks the add/drop date configuration to determine if the drop occurred before or after the add/drop date. If the 'Add Drop Flag' is configured to 'S - Course Section Enforced' for the course section's campus, the add/drop date at the course section level is used.

See also Tracking NDS students.

To change the status of a student:

1. Navigate to **Daily > Academic Records > Status Change**. The Status Change form is displayed.
2. Select or find the **Student** whose status is to be changed.
3. Select an **App/Enroll** in which the student's status is to be changed. CampusNexus Student displays the student's Current Status.
4. Select the **New Status** from the drop-down list. You can only change the status to one of those in the drop-down list. This list is controlled by the policy of your institution and by the requirements of CampusNexus Student.

   When you change a student's status from active to Leave of Absence (LOA), CampusNexus Student includes current and scheduled classes in the update.

   When you change a student's status to a Permanent Out category, the Loan Status is updated to "Grace". Set the Loan Status Effective Date to the AdEnroll Status Date, and set the Repayment Date to the AdEnroll Status Date + the Grace Days. Each field change adds a record to the Loan Management Status Change History table.

   When you change a student's status to a Drop system status for a single student, or during the Batch Status Change process, the "Drop Date" field is renamed to "Date of Determination".

   When you change a student's status to a Drop system status from any of the following paths in the application, validation on Date of Determination is performed when you save the status change (rather than when you move out of the field):

   - Daily > Status Change
   - View > Admissions > Status History > Change (button)
   - View > Academic Records > Enrollment > Status History (button) > Change (button)
5. Select a **Reason** from the drop-down list.

Before a reason code can be used here, it must be set up under Lists > Academic Records > Reasons. A reason code must be specified when posting a batch status change if at least one reason code has been attached to the status to which the student(s) are being changed.

The Reason field is disabled when you open this form. After you select the new status, the program check if at least one row exists in the Reason table where the School Status ID equals the status to which the students are being changed, and the Campus Group ID contains the campus listed at the top of the form. If at least one row is found in the Reason table, the background color of the Reason field changes to the color that identifies required fields. The status change will not take place when you click Save if the Reason is left blank. If no rows are found in the Reason table, the Reason field remains disabled.

6. Enter any **Comments** necessary to explain the status change.
7. Click **OK** to save the status change. A confirmation message is displayed. Click **OK** again.

Notes on Status Changes

Changing Status from Active to LOA

When you change a student's status from active to Leave of Absence (LOA), CampusNexus Student includes current and scheduled classes in the update.

Temporary Out Status

When a record is selected where the system status is a category of "T - Temporary Out", CampusNexus Student displays the begin and return date. If the new status is a type where the category is "T", the program displays the value of the begin date and return date fields. For example, you are prompted to enter a "Begin Date" and "Return Date" when you change the status to LOA.

Graduate Status Change

When you change a student to "Graduate" status, you are prompted for the graduation date and Last Date of Attendance (LDA). If you try to change the status of a student who is still taking classes to graduate, a message states that you cannot change the status. In this case, post final grades for all courses before changing the status.

The Status Change form defaults to the LDA date when changing status to GRAD, COMPLETE, or DROP. When changing a status to DROP, the system prompts for a LDA (last date of attendance). This gives you the option of overriding it or leaving it as is without accidentally changing the LDA to the current date and without forcing you to go to another form to look it up. This logic applies on all status changes that allow the LDA to be overwritten (Grads, Completes, Drops).

Never Attended or Cancellations

When you change the status of a student with an award package to Never Attended, CampusNexus Student checks for any awards where all associated disbursements have been set to a status of Canceled and sets the status for the award records to Canceled as well.

When you post a Drop status change, CampusNexus Student changes the status of the student's current classes to Drop and it *unexpects* (or cancels) financial aid. All financial aid disbursement statuses are set to Canceled, regardless of the fund source.

When you change a student's status to Cancel, or Application Rejected, you must enter an effective date. CampusNexus Student includes a stored procedure that runs nightly. This procedure checks the status change file.

When a student cancels an enrollment, i.e., notifies the school that he or she will not be attending classes, the student's status is usually changed to Canceled. To change a Canceled status to New Lead status, use the Student Master form. You cannot change a Canceled status to a New Lead status using the Status History form. This can only be done from the Student Master form.

Non-Degree-Seeking (NDS) Student Statuses

The prompts on the Status Change form (frmAdStatusChange.frm) for various dates and other information are based on the type of status change that is taking place. These include Non-Degree-Seeking (NDS) status codes and categories when setting the

prompts.

Standard status changes and changes to NDS enrollments are similar.

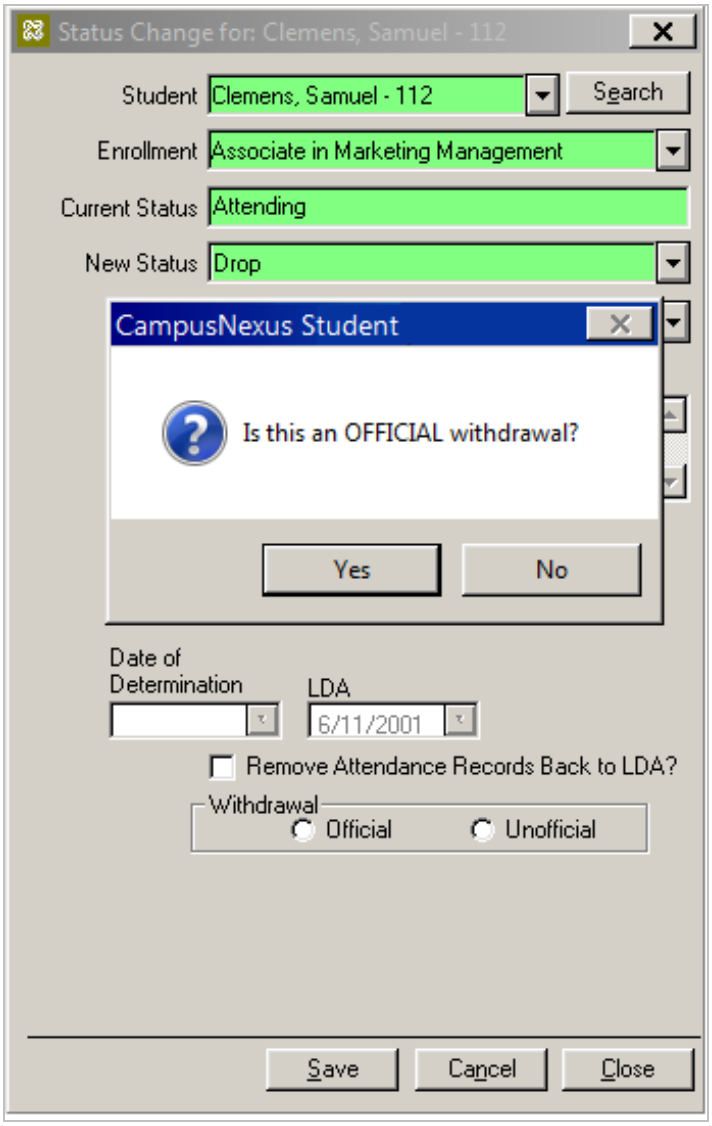
- NDS-DROP = DROP
- NDS-INC = INC
- NDS-COMP = COMPLETE
- NDS-NO = NOSHOW
- NDS-CAN = CANCEL
- NDS-REJ = APPREJ
- NDS-ATT = ATT
- NDS-RE = REENTRY
- NDS-BP = BP
- NDS-FUT = FUT

Changing Attending Status to Permanent Out/Drop

When the New Status is changed to Drop system status, specify if this drop is Official or Unofficial. The Official or Unofficial withdrawal selection is used in conjunction with Student Status Reporting and Withdrawal Date Settings to determine how to calculate a default NSLDS Withdrawal Date. This date is important because it is used as the status effective date in your SSCR and Clearinghouse reports. Designating whether a withdrawal is Official or Unofficial also impacts the calculation for the Date of Determination. To see more information on how these date are calculated, see Default Date Calculation for Drop Status Changes.

In addition to changing the enrollment's school status, posting a Drop status change for a student in CampusNexus Student changes the status for current classes to Dropped, unregisters all scheduled status courses, and 'unexpects' FA. All financial aid is set to Canceled (disbursement status) regardless of the FA fund source type. CampusNexus Student changes all disbursements that have a status of Scheduled to Canceled. CampusNexus Student cancels only disbursements that are scheduled. All other statuses, such as Ready to Pay and Paid, are not changed. Scheduled stipend disbursements are canceled. When enabled, the origination changes are created for the canceled disbursements (**Setup > Financial Aid > Direct Loan Setup**).

Another option is to automatically create origination changes to adjust to the Loan Period End Date to exclude the cancel disbursements from the loan period on Direct Loans, if a student withdraws between payment periods or hasn’t established attendance in a payment period following the initial payment period on a Direct Loan (**Setup Menu > Admissions > Financial Aid > Direct Loan Setup**). The date used for evaluation of the attendance within a Payment Period relies on the configured value on the program version under **Lists > Financial Aid > Programs**.



When you select Official by clicking the **Yes** button or Unofficial by clicking the **No** button, the status change form is enabled for further data entry. If Reasons have been configured for Drop status changes, the reason field will be available for selection first. After selecting a reason, a comment field is available to capture any additional information related to the status change. After entering comments, the various Date fields should be reviewed and addressed.

The Date of Determination (DOD) field is always pre-calculated. The number of days to add to the DOD is no longer configurable because the system defaults to LDA + 14 Days. Therefore, when a student is unofficially dropped, the DOD should be automatically calculated. If the staff member posting the status change has field level security to the Edit field, the pre-calculated Date of Determination can be modified.

For schools configured to take attendance:

- DOD will be the LDA + 14 calendar days or the withdrawal date, whichever is the lesser of the two.

For schools configured not to take attendance:

- DOD will be no later than 30 days after the end of the earlier date from the following selections:

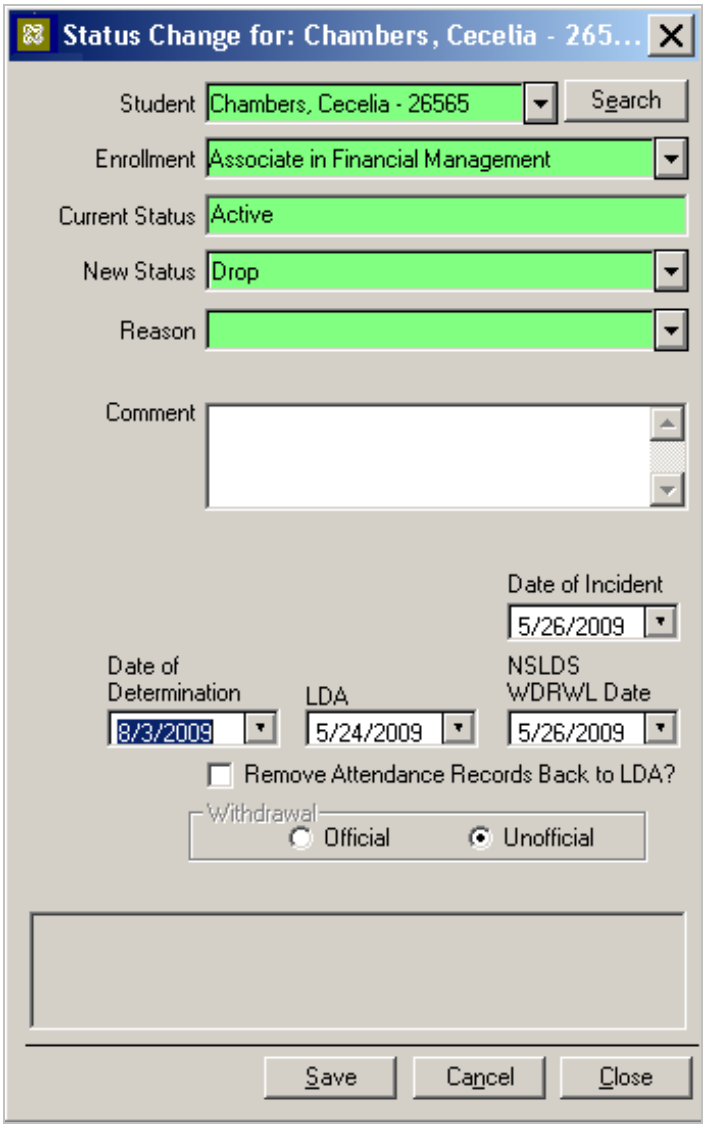
    1. End of the payment period or period of enrollment.
    2. End of the academic year.
    3. End of the student's educational program..

For Institutions that are not required by any outside entities to take attendance, selecting an Official withdrawal type results in an additional date field to capture the Official Notification Date. The date entered in this field is used to determine the NSLDS Withdrawal Date.

For Institutions that are not required by any outside entities to take attendance and do not have their own attendance policy (Status Date for Withdrawals configured as Use Drop Type), selecting an Unofficial withdrawal prompts a subsequent message box asking if the withdrawal was beyond the student's control. This additional question is based on the Dept. of Education guidelines for non-attendance taking institutions. If the withdrawal is due to reasons that were beyond the student's control, the withdrawal date should be the date of the incident that occurred to cause the student to withdraw. Staff members posting the withdrawal will see an additional Date of Incident field. The date entered as the Date of Incident will then be used to populate the NSLDS Withdrawal Date. If the answer to the prompt is No, the NSLDS Withdrawal Date is pre-calculated based on the Financial Aid program version configurations (Academic Calendar and in the case of Non-Traditional programs the RT4 settings).

In other scenarios, there are no additional prompts or date fields, and the NSLDS Withdrawal Date is pre-calculated. To ensure accurate withdrawal dates, the status change form also includes text to explain the logic used to calculate a default NSLDS Withdrawal Date. And like the Date of Determination field, the NSLDS Withdrawal Date is subject to field level security settings and can be modified by staff members with the appropriate privileges.

See Default Date Calculation for Drop Status Changes for more detailed information on how the Date of Determination and NSLDS Withdrawal Dates are calculated.



Default Date Calculation for Drop Status Changes

Date of Determination

When the withdrawal is categorized as Unofficial, the Date of Determination (DOD) is precalculated based on the LDA + configured Days to Add to LDA for Determination Date on Unofficial Withdrawals (configured under Setup > Campus Locations > Academic Records).

When a withdrawal is categorized as Official, the Date of Determination is precalculated with the system date (current date when executing the status change). This also applies for unofficial withdrawals at schools that do not take attendance and therefore have no last recorded date of attendance.

NSLDS Withdrawal Date

The following types of Institutions need to be considered when determining how to calculate withdrawal dates:

1. Institutions with Programs and/or Fund Sources that are required to take attendance by some outside entity (this could be an Accreditation body, the Department of Education, or an agency that provides student funding).
2. Institutions that are not required by an outside entity, but still take attendance according to their own policy.
3. Institutions that do not take attendance at all.

CampusNexus Student calculates default withdrawal dates differently depending on the type of Institution processing the Drop status change. Therefore, it is important to properly configure the Student Status Reporting and Withdrawal Date Settings, as well as the Program Versions & Fund Sources at each campus.

Type 1 - Attendance Required by an Outside Entity

The NSLDS Withdrawal Date always defaults to the LDA when the student being dropped is enrolled at an Institution that is Required to Take Attendance by an Outside Entity or in a program version that has the Attendance Required flag set or is currently receiving aid at the time of the withdrawal from a fund source that has the Attendance Required flag populated. This is true regardless of whether the withdrawal is classified as Official or Unofficial.

Type 2 - Attendance Not Required by an Outside Entity, however Institutional Attendance/Withdrawal Policy Exists

When a student is being dropped at an Institution that has opted to take attendance according to its own policy (Attendance is not required by an outside entity and the Status Date for Withdrawals setting is defined as L-LDA), the NSLDS Withdrawal Date defaults according to the following logic:

- If the withdrawal is Official and the Official Notification Date does not fall within a scheduled break of 5 days or more, the Official Notification Date is used to populate the NSLDS Withdrawal Date field.
- If the withdrawal is Official and the Official Notification Date falls within a scheduled break of 5 days or more, the student's last scheduled class day prior to the break (regardless of whether the student attended) is used to populate the NSLDS Withdrawal Date field.
- If the withdrawal is Unofficial, the NSLDS Withdrawal Date is populated using the LDA + the configurable # of days (set in Setup > Campus Locations > Allow > Number of days to add to LDA for unofficial withdrawal).

  Note: If the calculated date falls within a school holiday or break, the date is adjusted to the next non-holiday/break date.

Type 3 - Non-Attendance Taking Institution:

When a student is being dropped at an Institution that does not have its own attendance policy and does not regularly record attendance (Attendance is not required by an outside entity and the Status Date for Withdrawals setting is defined as U-Use Drop Type to Determine), the NSLDS Withdrawal Date defaults according to the following logic:

- If the withdrawal is Official and the Official Notification Date does not fall within a scheduled break of 5 days or more, the Official Notification Date is used to populate the NSLDS Withdrawal Date field.

- If the withdrawal is Official and the Official Notification Date falls within a scheduled break of 5 days or more, the student's last scheduled class day prior to the break is used to populate the NSLDS Withdrawal Date field.
- If the withdrawal is Unofficial and the reason for the withdrawal is beyond the student's control, the NSLDS Withdrawal Date is based on the Date of the Incident (that was beyond the student's control).
- If the withdrawal is Unofficial and the reason for the withdrawal is NOT beyond the students control, the NSLDS Withdrawal Date is determined using the Financial Aid settings on the program version. Specifically,
    - If the student's program version has a traditional academic calendar (standard terms of quarters, semesters or trimesters), the NSLDS Withdrawal Date is the midpoint or the end date of the current or previous academic term. This determination is made by finding the most current course in a Completed or Current Status.

      If the most current course is completed, the end date of that term is used.

      If the most current course has been started, but has not yet been completed, the midpoint of the corresponding term is used.
    - If the student's program version has a non-traditional academic calendar (non-standard terms, clock hours or credit hours without terms), the NSLDS Withdrawal Date is determined by the RT4 Period Type settings. Specifically,
        - If the RT4 Period Type is set to Payment Period, at the point of withdrawal, the system determines if the student has completed their current payment period (determining the current payment period is based on the payment periods dates, and determining if the payment period is completed is based on if the student has met both the credits/hours criteria and the weeks)
            - If Yes, the NSLDS Withdrawal Date is the end date of this payment period.
            - If No, the NSLDS Withdrawal Date is the midpoint of this payment period.
        - If the RT4 Period Type is set to Period of Enrollment and the RT4 Period of Enrollment is set to Program Start/End Date, the NSLDS Withdrawal Date is the midpoint of the program (midpoint calculated using the version start date and expected grad date).
        - If the RT4 Period Type is set to Period of Enrollment and the RT4 Period of Enrollment is set to Academic Year Start/End Date, the NSLDS Withdrawal Date is the midpoint of the students current Academic Year.

Determination of Course Status When a Student's Enrollment is Dropped

	NSLDS Withdrawal Date On/Before Add/Drop & Before LDW Date	NSLDS Withdrawal Date After Add/Drop but On/Before LDW Date	NSLDS Withdrawal Date After Add/Drop & LDW Date
Enforce Add/Drop Date for Scheduled Status Courses **Disabled** & Enforce LDW dates **Disabled**			
Scheduled	Unregister	Unregister	Unregister
Current/LOA	Drop	Drop	Drop
Enforce Add/Drop Date for Scheduled Status Courses **Enabled** & Enforce LDW dates **Enabled**			
Scheduled	Unregister	Drop	Complete
Current/LOA	Drop	Drop	Complete

	NSLDS Withdrawal Date On/Before Add/Drop & Before LDW Date	NSLDS Withdrawal Date After Add/Drop but On/Before LDW Date	NSLDS Withdrawal Date After Add/Drop & LDW Date
Enforce Add/Drop Date for Scheduled Status Courses **Enabled** & Enforce LDW dates **Disabled**			
Scheduled	Unregister	Drop	Drop
Current/LOA	Drop	Drop	Drop
Enforce Add/Drop Date for Scheduled Status Courses **Disabled** & Enforce LDW dates **Enabled**			
Scheduled	Unregister	Unregister	Unregister
Current/LOA	Drop	Drop	Complete

While moving course statuses to Complete, grades are posted by the system. If the course has a Pass/Fail grade, the grades configured as After LDW Grade and Pass/Fail Grade are posted. For other courses, the grade configured as the default After LDW Grade is posted. Grade posting is performed by the system automatically. If multiple Grade Letters are configured, the last grades configured in the grade scale are posted.

Batch Status Change

You can use the Batch Status Change option to change a status for several students at the same time. If several students have the same current status in common and they all need to be changed to the same new status, use this form. CampusNexus Student take the same actions for the batched status changes that would be taken for individual student status changes. Depending on the current status and the new status, CampusNexus Student asks for different items of data. For instance, if the new status is Complete, CampusNexus Student asks for a Date Complete and a Last Date of Attendance (LDA). If the new status is Drop, CampusNexus Student asks for the drop and LDA dates and changes the appropriate records, such as scheduled classes and financial aid.

Status changes are controlled by parameters selected on the Status Changes form (Setup > Status Codes). The system administrator maintains these parameters. When you perform a status change, the status change grid presents the allowable status changes.

In conjunction with the Automatic Document Scheduler feature, document schedules based on Pre-Enrollment or Enrollment are evaluated when the status for a student is modified and saved using the batch status change form. If the students' data matches the specified criteria for a document schedule where the criteria includes student status, all documents attached to the document schedule that are not already scheduled are scheduled for the students.

You can perform a status change on a student group. CampusNexus Student checks for hold codes, verifies status change rules, and creates exception reports for students in the group who do not meet the conditions required for the selected status change.

Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

Loan Management: When you change a student's status to a Permanent Out Category, CampusNexus Student updates the Loan Status field to Grace, sets the Loan Status Effective Date to the Enrollment Status Date, and sets the Repayment Date to the Enrollment Status Date plus the Grace Days. Each field change results in a record added to the Loan Management Status Change History table.

Non-Degree-Seeking (NDS) Students Statuses

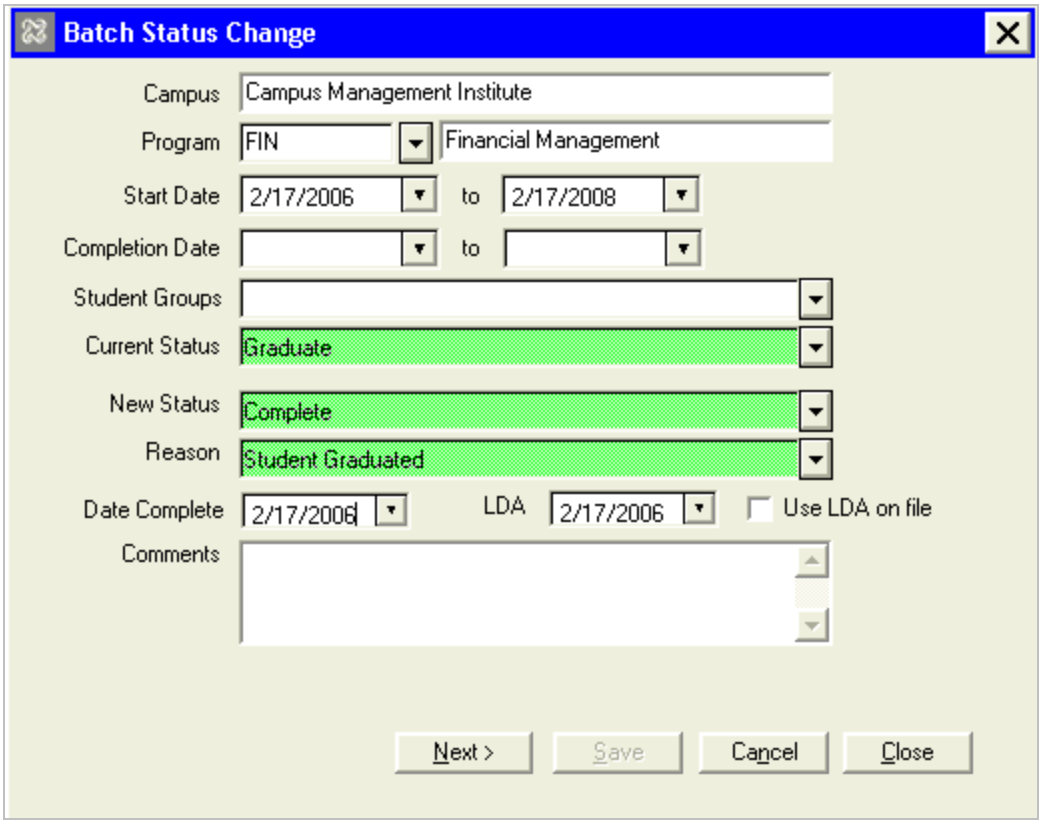
The prompts on the Batch Status Change form for various dates and other information are based on the type of status change that is taking place. The logic includes the NDS status codes and NDS status categories when setting the prompts. Standard status changes and changes to NDS enrollments are similar. See also Tracking NDS student.

Student Status Codes - Non-Degree Seeking

- NDS-DROP
- NDS-INC
- NDS-COMP
- NDS-NO
- NDS-CAN
- NDS-REJ
- NDS-ATT
- NDS-RE
- NDS-BP
- NDS-FUT

To change the status for a batch of students:

1. Select **Daily** > **Academic Records** > **Batch Status Change**. The Batch Status Change wizard is displayed.



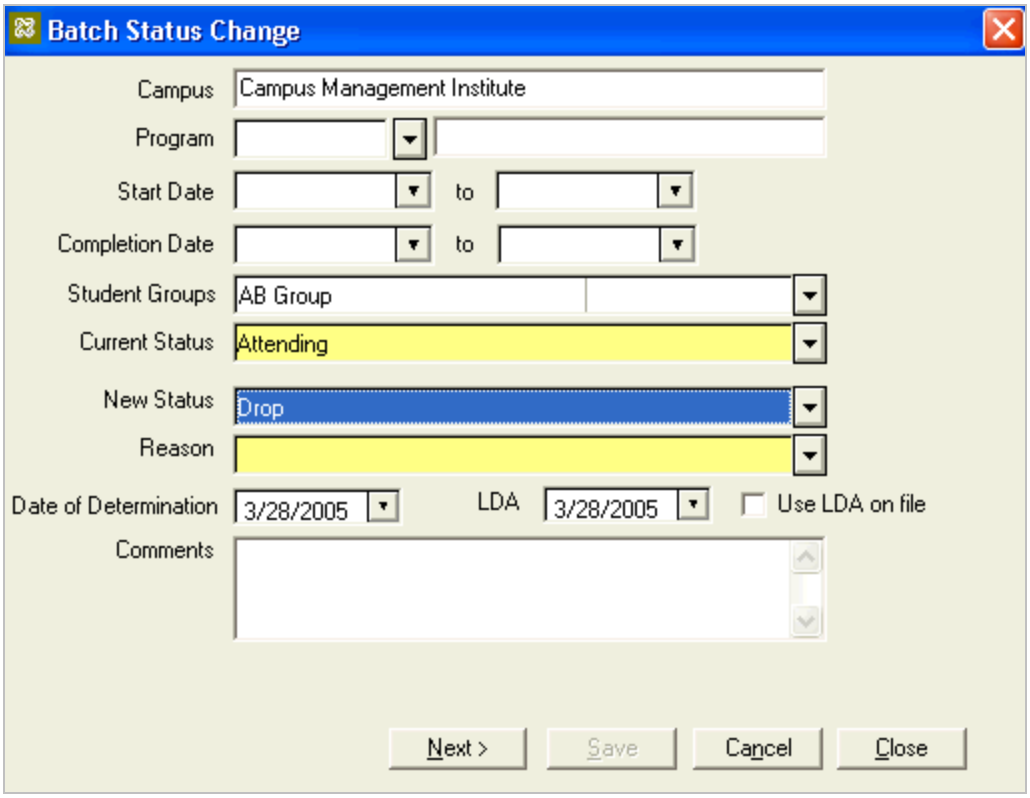
2. The **Campus** shown on the form is your default campus. To change the campus shown on this form, you must change the campus that you are logged into.
3. Select an optional **Program code**.
4. Enter any of the **Optional Date Fields**.
5. Select an optional **Student Group**. When you click **Next**, CampusNexus Student checks for hold codes, verifies status change rules, and creates exception reports for students in the group who do not meet the conditions required for the selected status change.
6. Select a **Current Status.** Required.
7. Select a **New Status.** Required. The new status you select may cause CampusNexus Student to display other fields on the form, some of which may be required. Select an option or enter data for any required fields.

   In the example, selecting Drop as the new status caused the Reason, Drop Date, LDA, and Use LDA on file fields to be displayed. These must be completed before continuing. When you change the students' status from active to leave-of-absence (LOA), CampusNexus Student includes current and scheduled classes in the update. When dropping multiple students, the default grade as set on the Grade Scale is applied. If no default grade is enabled, no grade is applied for dropped students in the batch.

When a student's status is changed to a Drop system status for a single student or during the Batch Status Change process, the Drop Date field is renamed the Date of Determination field. The NSLDS Withdrawal Date is calculated from the student's record and automatically populated.

For information on how course status changes are determined when a student is dropped, see Notes on Status Changes.

8. Select a **Reason**. This field is required if enabled.
9. Enter any **Comments** appropriate to the change you are making.
10. Click **Next**. CampusNexus Student displays the list of students affected by the status change you are about to make.

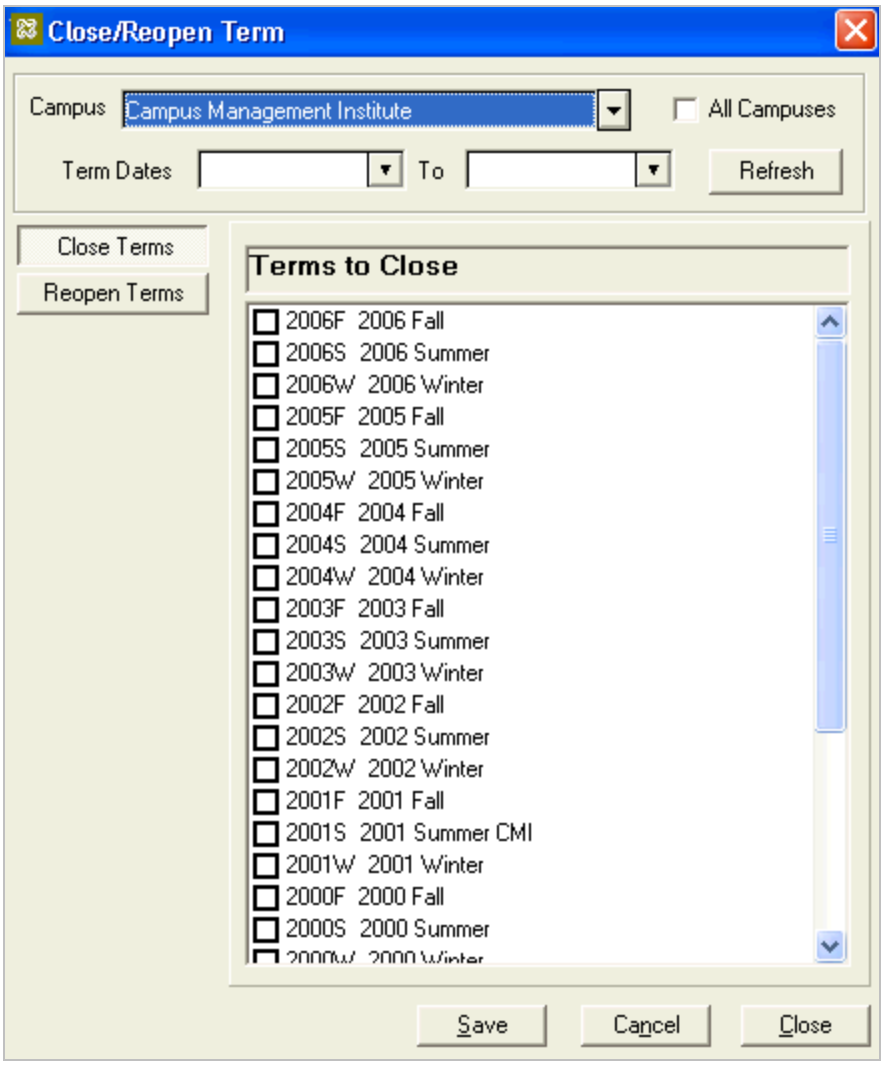


11. Select the **Omit** check box beside any student you want to exclude from the status change.
12. Click **Print** to print a list of the students affected by the status change.
13. Click **Save** to save the status changes. If the status of some of the students cannot be changed, CampusNexus Student displays a message. Click **OK** to acknowledge the message. The program will process the status changes for the remaining students.
14. CampusNexus Student displays a message when the status change process is complete. Click **OK**.
15. Click **Cancel** to clear the form and leave it open.
16. Click **Close** to close the form.

Close/Reopen Term

You can use the Close/Reopen Term function to close terms to prohibit changes to the data from that term. You can allow designated users to reopen the term when changes to information in that term are necessary (that is, grade changes, attendance corrections). You can close a course when all grades for the course have been entered. This locks down the grades and prevents grade changes from occurring without the proper authorization. Additional Daily functions for grade changes have also been added to allow for grade changes to be made to closed courses.

1. Select **Daily** > **Academic Records** > **Close/Reopen Term**. The Close/Reopen Term form is displayed.



2. Select the **Campus** from the drop-down menu or select **All Campuses**.
3. Select the starting and ending **Term Dates**.
4. Click **Close Terms** to see the list of open terms to make your selection.
5. Click **Reopen Terms** to see the list of closed terms to make your selection.
6. Click **Save** to update all records you have selected.

Note: Changes to attendance roster, attendance dates, grade book, and final grades requires you to reopen the term.

Population Analysis/IPEDS Enrollment Survey

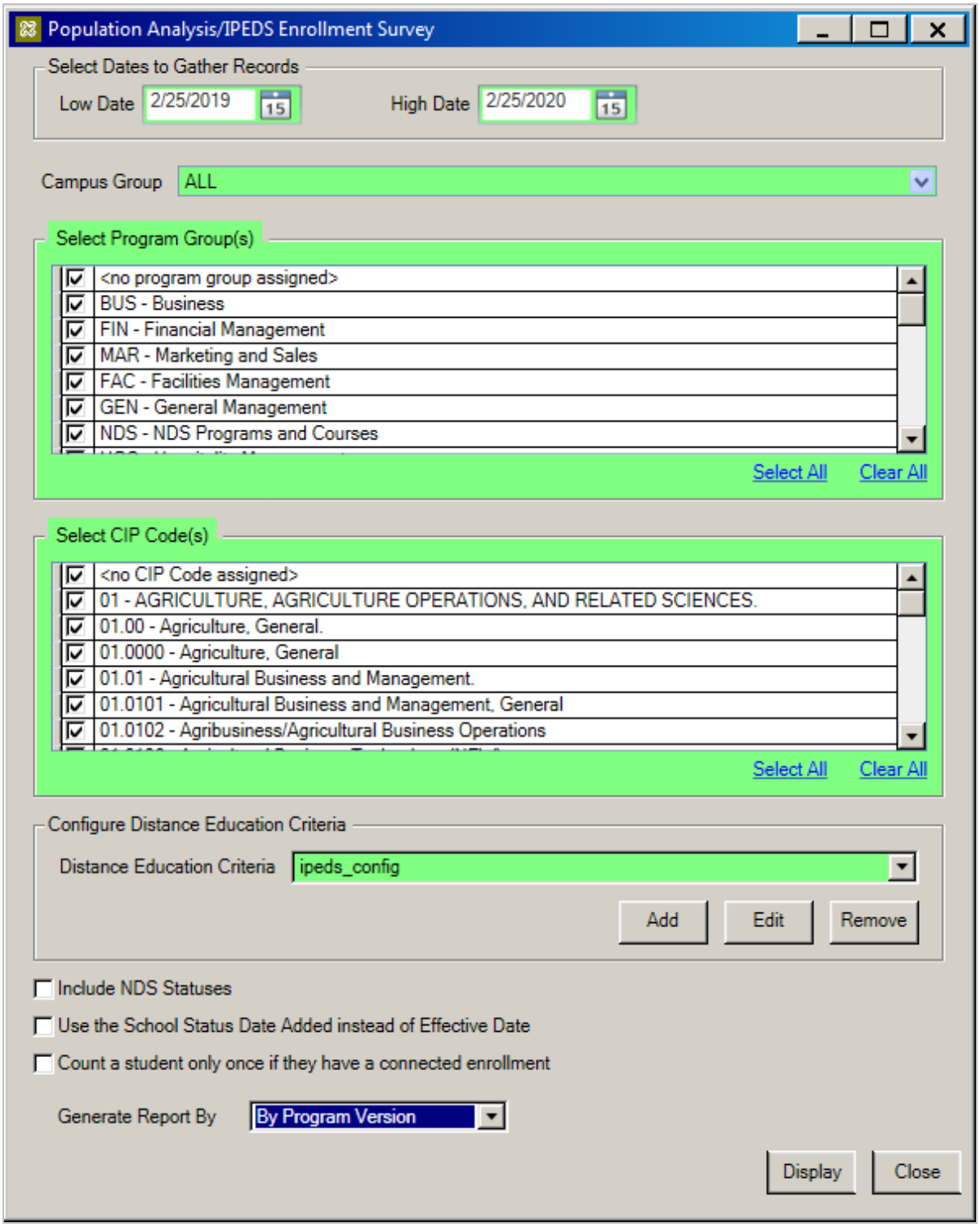
The Population Analysis helps you with many accrediting agency reports and with the two IPEDS Enrollment Surveys: the 12-Month Enrollment Survey and the Fall Enrollment Survey. The Population Analysis is a cube report. You can review the characteristics and manipulation of cube reports by reviewing the Cube Reports topic.

When CampusNexus Student displays the Population Analysis cube, you can manipulate the rows and columns, preview and print the data in spreadsheet format, create and print a graph, and export the data to Excel. You can save the results to a file. The cube opens with one row for each program version in your school. For each program version, there are columns for beginning population, new starts, re-entry students, transfers in, transfers out, incompletes, drops, completes, Standard Period of Non-enrollment (SPN), graduates, and ending population. Some additional variables that are also available include campus, student status, shift, lead source, admissions rep code, student name, SSN, ethnic code, gender, ZIP code, enrollment status, grade level, degree, and age bracket.

Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

To run the Population Analysis Cube:

1. Navigate to **Daily > Academic Records > Population Analysis/IPEDS Enrollment Survey**. The Population Analysis/IPEDS Enrollment Survey selection form is displayed.



2. Select the **Low Date**, **High Date**, **Campus Group**, and **Program Group** for which to run the analysis. Click ... in the Program Group field to display a list of the program groups that were created and flagged as Active in **Lists > Academic Records > Program Groups**.
3. Select a **CIP Code** from the drop-down list. Click

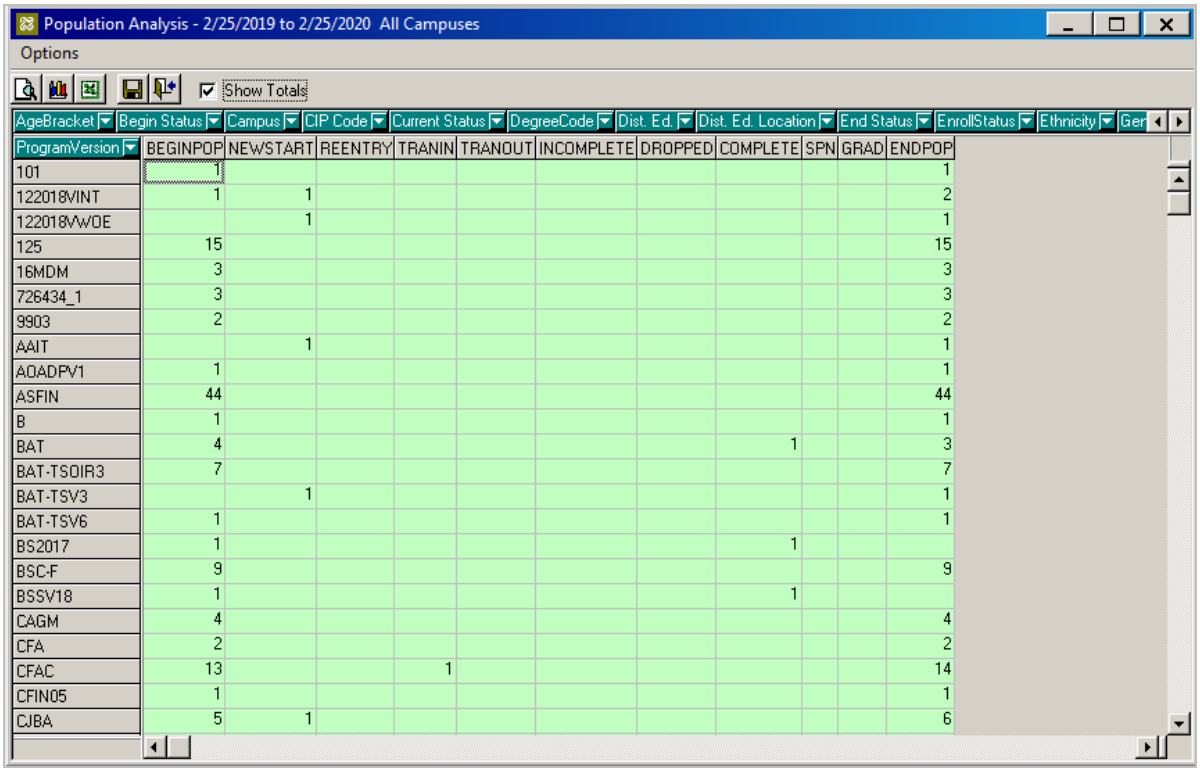
to select multiple CIP Codes. These codes are defined by the National Center for Education Statistics (NCES). HERA requires that schools provide this report broken down by CIP Code.

4. If your school accepts international students, CampusNexus Student adds a check box to this form named **Report Using International Students Only**. Select this check box to show data on the cube for international students only. In this case, CampusNexus Student adds Visa Type to the variables available at the top of the cube window.
5. Select **Include NDS Statuses** to include in the report those students in a Non-Degree Seeking school status. Non-Degree Seeking statuses are used when students are enrolled in Program Versions that are configured as Non-Degree Seeking. If this option is left cleared, the Non-Degree Seeking program versions and the students enrolled in them will not be included on the report.
6. Select the **Use the School Status Date Added instead of the Effective Date** option to tell the system which date on the student's status change history records to use when calculating the appropriate population bucket(s) for the student. If this option is selected, the system uses Date Added to calculate the status for the student. If the option is not selected, the system uses the Effective Date (also called the Begin Date) to calculate the student status.
7. Select the **Count a student only once if they have a connected enrollment** option to designate that the Population Analysis report should not count students with connected enrollments more than once. If this option is selected, the report will include enrollment specific information for connected enrollments using the default enrollment only.
8. Select an option from the **Generate Report By** drop-down list. You can generate and sort the report by **Program Version** or **Area of Study**.

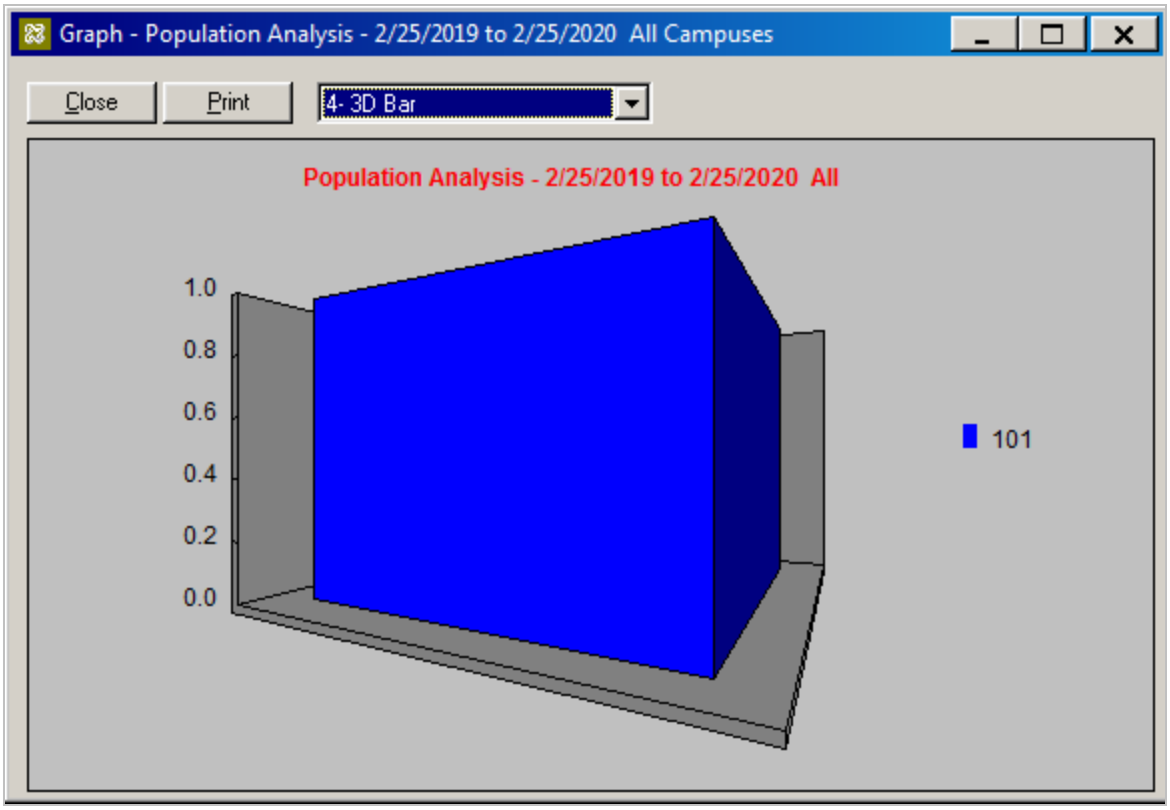
   Note: If you select Area of Study option, the cube report will contain three additional sort variables - Major, Minor and Concentration.
9. Click **Display** to run the Population Analysis cube. When the calculations are finished, a cube grid will appear.

   The available variables in the cube include Campus, Current Status (of student in school), Begin Status, End Status, Reason Code (Enrollment Survey, Part G), Age Bracket, Shift, Lead Source, Rep Code, Student Name, SSN, Start Date, Race Code, Gender, Previous Education, State, IPEDS State (Enrollment Survey, Part C), ZIP, Grade Level Code, Degree Code, Enrollment Status, Program, High School Grad Date, High School Grad Year, CIP Code, and Visa Type (for international students). If the report was sorted by Area of Study, three additional variables - Major, Minor and Concentration - will be included.

   Note: The Orig Grad Date column enables institutions to identify graduate students correctly by determining completion rate calculations. This information comes directly from the "Orig. Exp Grad Date" field on the student's Enrollment form.



10. Click to see a preview of a spreadsheet report with the data from the cube. The report can be formatted to a limited extent and printed.
11. To see or print a graph of the data from the cube, highlight all data cells you want to include in the graph and then click .



12. Click to transfer the data to an Excel spreadsheet.
13. Click to save a copy of your Population Analysis data. A message with the name and location of the saved cube file is displayed.
14. Select or clear **Show Totals** as you require.
15. Click to close the Population Analysis Cube.
16. Click **Close** to close the form.

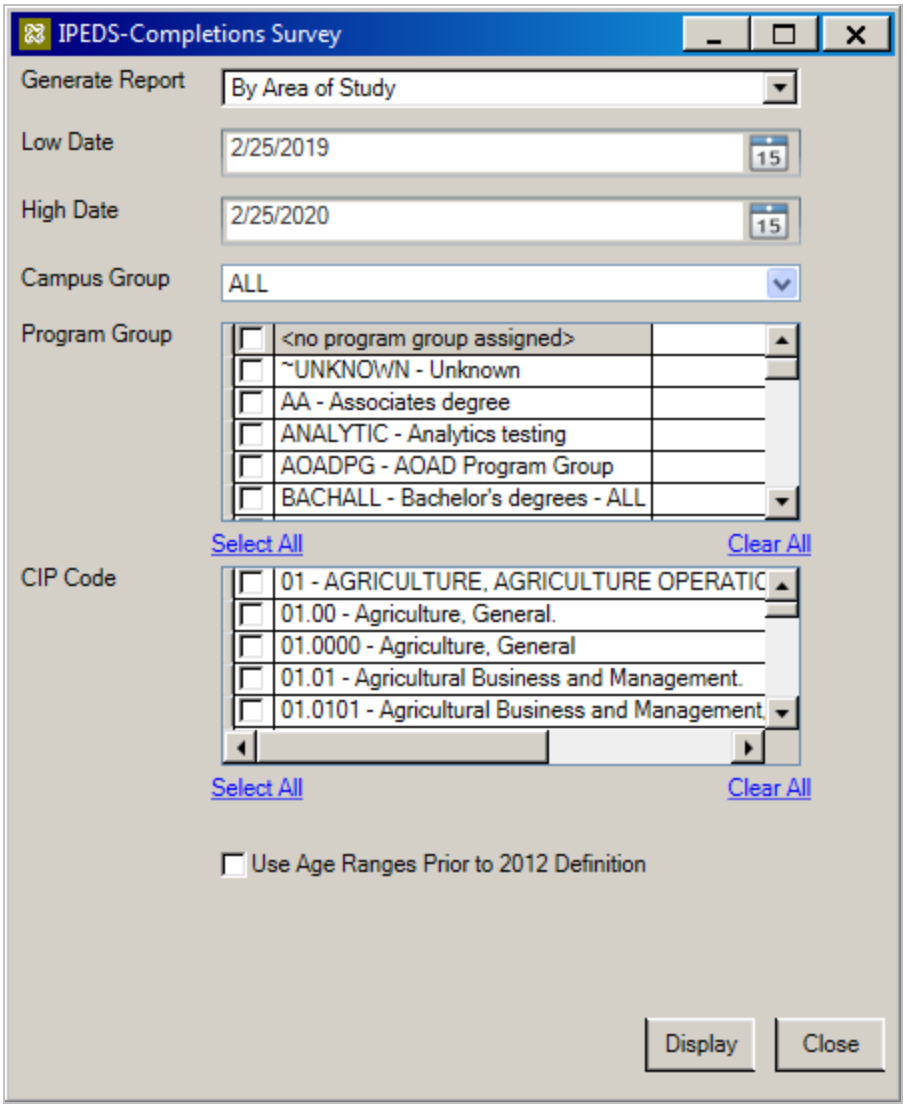
IPEDS Completions Survey

This cube report provides information to help you complete your IPEDS-C Form. An initial dialog box asks you for the Low Date, High Date, and Campus Group. The selections on the cube include Degree, Student Name, SSN, Campus Code, Ethnicity, Gender, and Graduation Date.

Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

To run the IPEDS-Completions Survey cube report:

1. Navigate to **Daily** > **Academic Records** > **IPEDS-Completions Survey**.

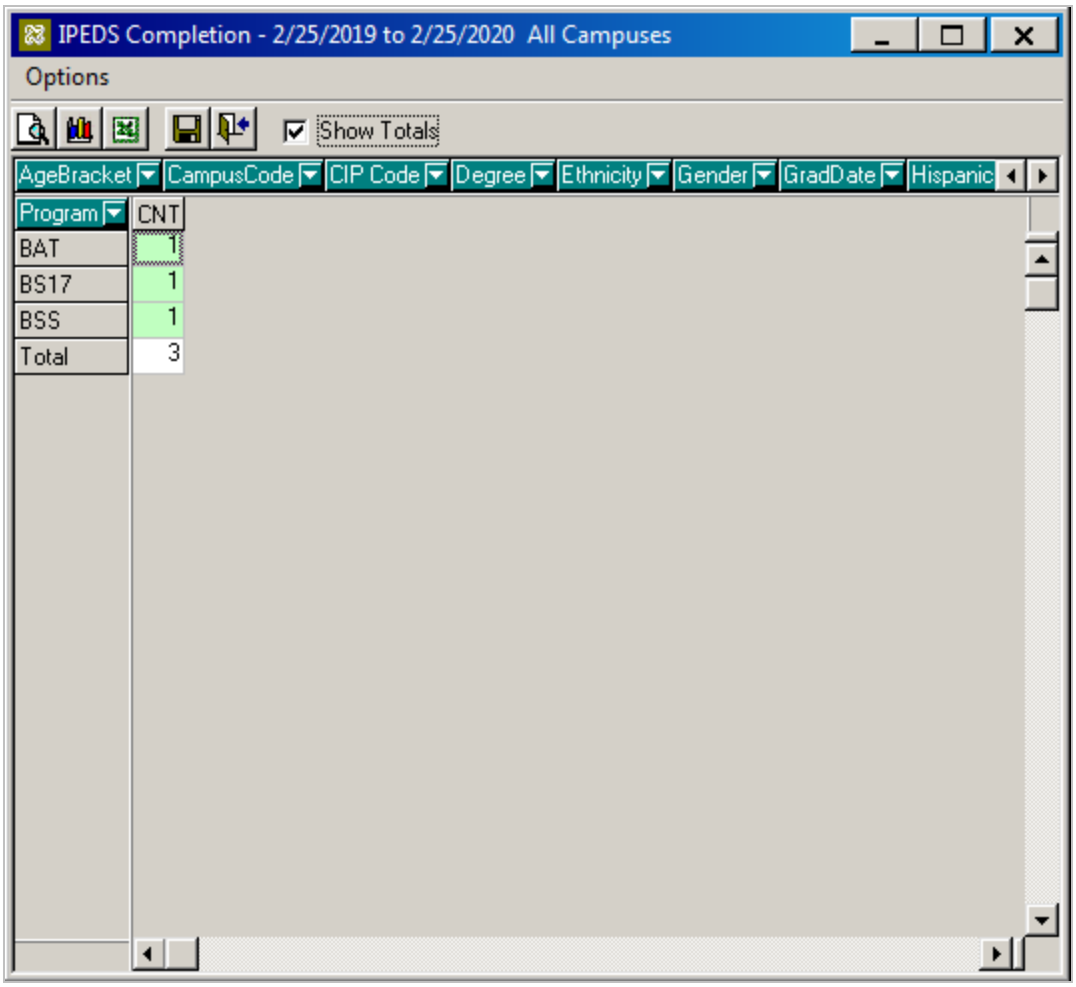


2. You can generate and sort the report by **Program Version** or **Area of Study**. Select an option from the Generate Report list.

Note: If you select Area of Study option, the cube report will contain three additional sort variables - Major, Minor, and Concentration.

3. Enter the **Low Date** and **High Date**. The date range is an "Enrolled As Of Date Range" similar to that on the population analysis.
4. Select a **Campus Group** for which to run the report.
5. Select the **Program Group** for which to run the analysis. Click ... in the Program Group field to display a listing of the program groups that were created and flagged as Active in**Lists > Academic Records > Program Groups**.
6. Select a **CIP Code** from the drop-down list. Click ... to multi-select CIP Codes. These codes are defined by the National Center for Education Statistics (NCES). HERA requires that schools provide this report broken down by CIP Code.
7. Click **Display**. The program will gather the necessary data and display the cube report. The available data variables for this cube report are Student Name, SSN, Campus Code, Ethnicity, Gender, Grad Date, CIP Code, and Degree.

   Note: The Orig Grad Date column enables institutions to identify graduate students correctly by determining completion rate calculations. This information comes from the **Orig. Exp Grad Date** field on the student's **Enrollment** form.



8. Arrange the data elements on the horizontal and vertical axes of the grid as desired to obtain your analysis of the

data. See the topic titled "Cube Reports" for more instruction about this versatile reporting tool.

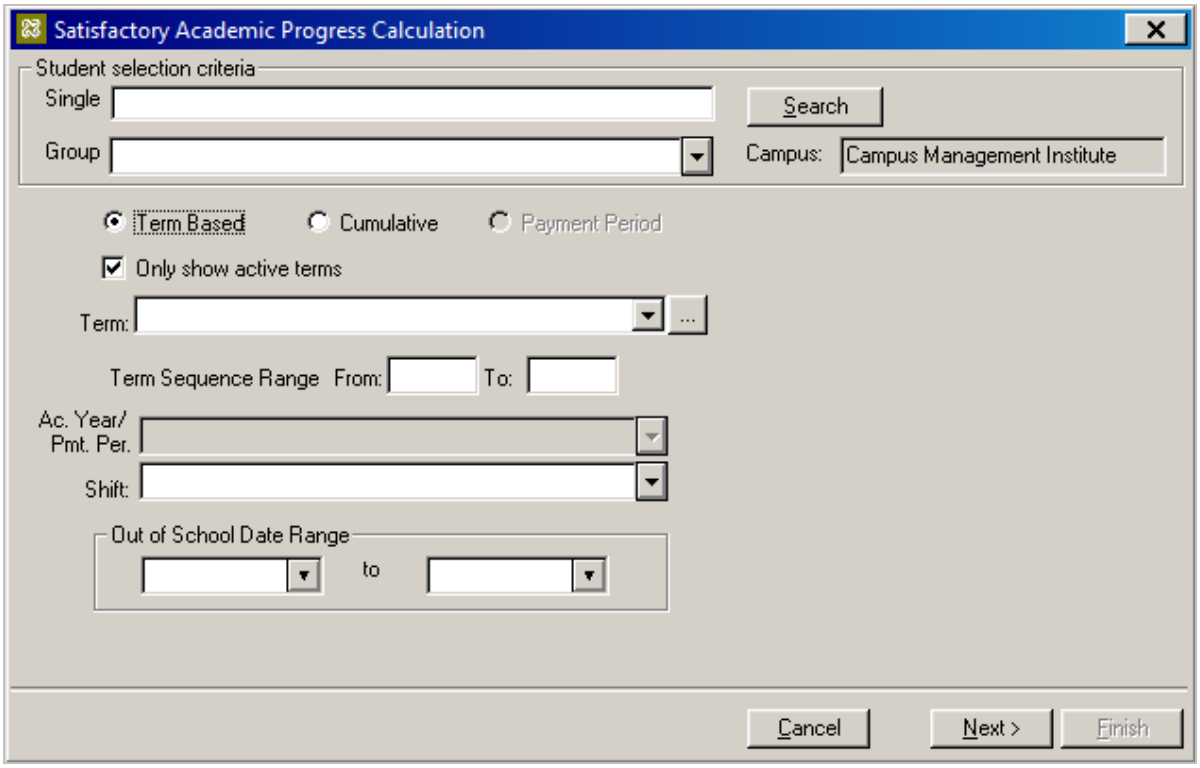
9. Close the report window when you are finished working with it.
10. Close the IPEDS Completions Survey form.

Processing a SAP Calculation

The SAP wizard automates the calculation of students' academic progress. If a student does not meet SAP, then all SAP failure reasons are displayed in the SAP calculation listing, as well as all SAP reports.

To process the SAP calculation:

1. Navigate to **Daily** > **Academic Records** > **Satisfactory Academic Progress**. The first page of the SAP wizard (Satisfactory Academic Progress Calculation) is displayed. The SAP is calculated for the default campus.



2. You can calculate the SAP for a single student, a group of students, or all students.
   - For a single student, enter the student's name in the **Single** field or use the **Search** button to find the student.
   - For a group of students, select the group from the **Group** drop-down list.
   - For all students, leave the Student selection criteria fields blank.

   The fields available for selection on the SAP Calculation form depend on the Student selection criteria.

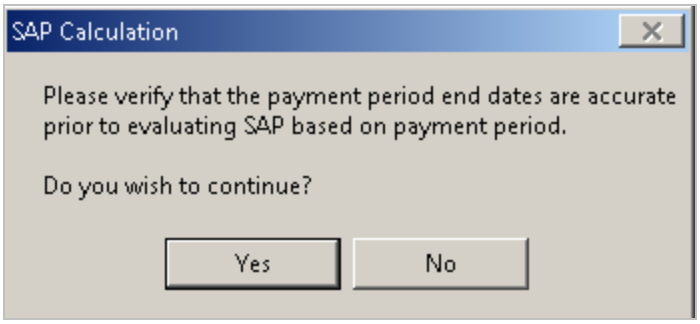
3. Select an option indicating whether the SAP calculation is Term Based, Cumulative, or by Payment Period.
   - For the **Term Based** option, use the **Term** drop-down list to select the term. The selected term is the first term for which SAP is calculated. The SAP calculation then processes each subsequent term through the most recently completed term.

     Note: You cannot run SAP by Term Sequence if you are evaluating Partial Terms. You must process SAP by Student, Term, Student Group, or Cumulative. Your SAP Policy can still use Term Sequences as an

evaluation criterion (Lists > Academic Records > SAP), you just cannot use the Term Sequence Range to process SAP (Daily > Academic Records > Satisfactory Academic Progress).

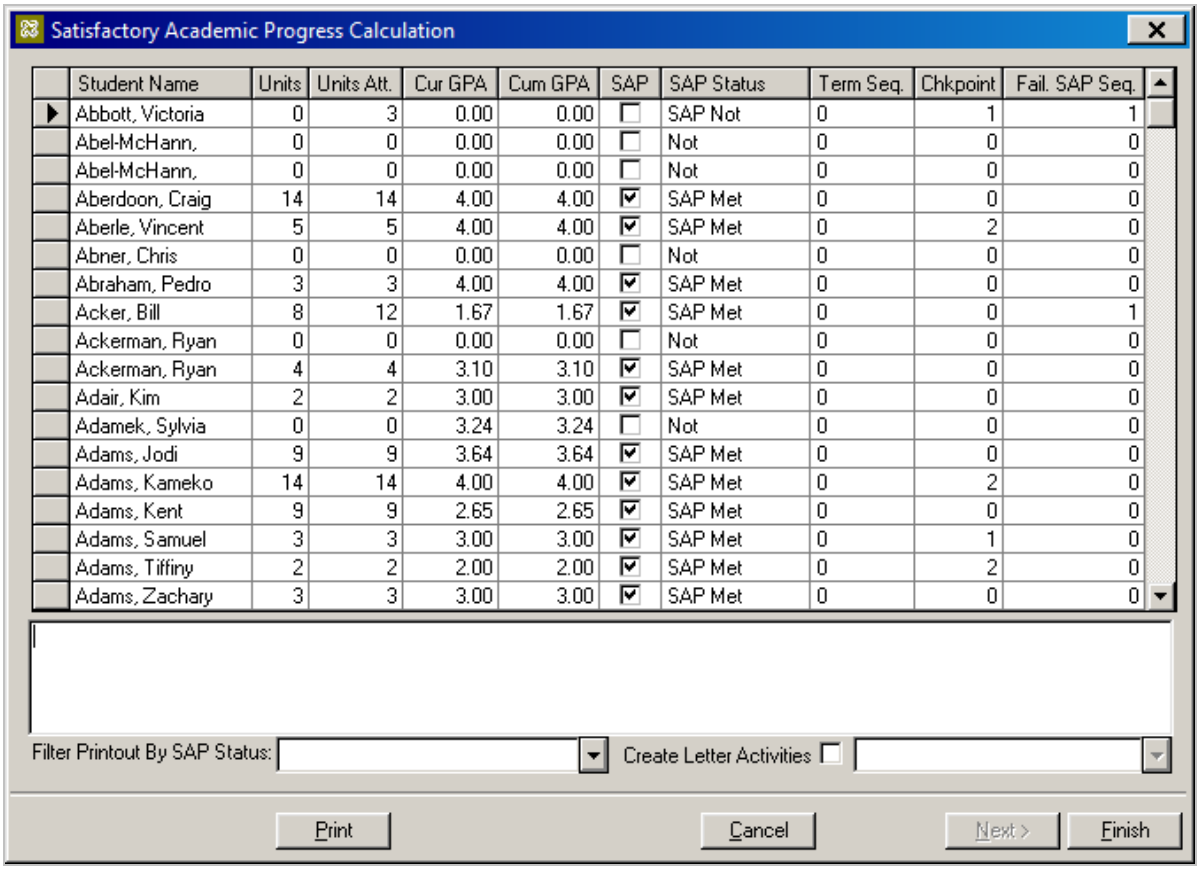
- For the **Cumulative** option, the term-related and payment period-related fields are disabled, and a message indicates which students are evaluated and that multiple enrollments are considered in the calculation.
- For the **Payment Period** option, if a single student is selected, from the **Ac. Year/Pmt. Per.** drop-down list, select the academic year/payment period for which SAP is to be run. This drop-down list is only available if the Single student field is populated. When re-evaluating SAP based on payment periods for a single student, the system prompts you to run SAP for any subsequent payment periods.

  When running SAP based on payment period, the system assumes that the payment period end dates are correct and prompts you to verify that they are accurate. To confirm that the payment period end dates are correct, you should run the Student Pace Evaluation (SPE) tool. If your institution's business process currently does not include the use of the SPE tool, the accuracy of the payment period end dates needs to be verified.



  SAP reports based on payment periods include the SAP Evaluation Date field. The value in this field displays on the SAP List Report.

4. For a Term Based SAP calculation, select or clear the **Only show active terms** check box as applicable.
5. For a Term Based SAP calculation, enter the start of the **Term Sequence Range** in the **From** field and the end of the range in the **To** field.
6. For a Term Based or Cumulative SAP calculation, select the **Shift**, that is, the time period during which the student's course is available at the campus. If you do not select a shift, SAP is calculated for all shifts .
7. If applicable, select the beginning date and end date of the **Out of School Date Range**. When this option is used, SAP evaluates students that have a status of dropped.
8. Click **Next** to continue with the next page of the SAP wizard.
9. The second page of the SAP wizard lists all students that are evaluated in the SAP calculation. You can filter the results that are displayed by selecting a status from the **Filter Printout by SAP Status** drop-down list.



Results of the SAP calculation are dependent upon the SAP table setup, the individual student's academic progress, and whether enrollments are linked. See SAP Audit for explanations for the fields.

The SAP wizard verifies that the student's term sequences, Auto Probation and School Status changes configured in the SAP Detail Code Setup are not updated for historical terms. CampusNexus Student determines the most recently completed term and processes the Auto Probation/ School Status changes for the most recently completed term only.

10. A check mark in the **SAP** column indicates that the student meets the SAP requirements; if the box is cleared, the student does not meet the SAP requirements.

    If you have permission to override the SAP status, you can override the automatic calculation of SAP for a student by selecting or clearing the SAP check box. When you override the automatic SAP calculation, your overrides are saved and shown on the SAP report.

    When you select a SAP check box, you can select a new SAP status from the drop-down list which then replaces the system defined SAP status. An audit entry is recorded in the Academic Records folder within the SAP Audit tab.

    The next time the SAP calculation is processed, the automatic calculation evaluates each student again. Any previous overrides are overwritten based on the new calculation.

11. When you click the area to the left of the Student Name for a student with a failed SAP, *all* failed reasons appear below the list of students.

- When posting SAP, the system records *all* failed Detailed SAP criteria reasons and related messages to the SAP audit folder for the detailed SAP sequence evaluated. The system displays customized SAP failure reasons, if defined, otherwise system-defined SAP reasons are presented. Letter activities can be created to send letters to these students.
- The *Students who exceed the maximum time frame of credit/clock hours criteria* configured for the SAP Policy are evaluated, even if the student has already *failed* one criterion within the SAP Policy.
- When posting SAP, the system records *all* failed criteria from the SAP Policy and related reasons and display the information in the student's SAP audit folder in the Additional Information field.

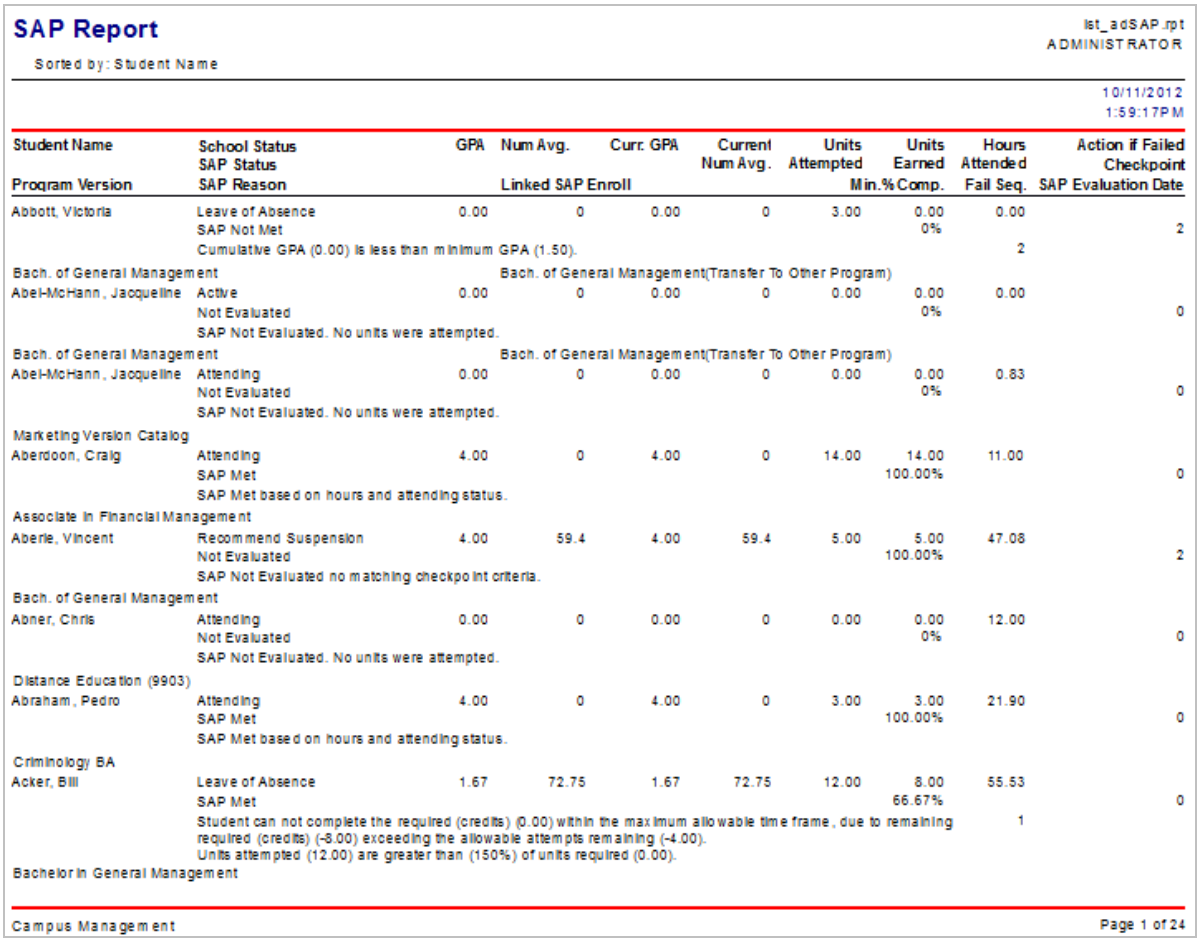
12. To create letter activities from the SAP Calculation wizard, select the **Create Letter Activities** check box and choose a letter type from the drop-down list.

    Upon completion of the SAP Calculation, letter activities are assigned to those students in the SAP Calculation process that do not meet SAP. These activities have pending status and are placed in the student's activities folder and faculty member Contact Manager folder until the letters have been printed successfully. The activities are then closed and assigned a closed status.

13. Click **Print** to print the SAP calculation results, including any overrides. To filter the print results, select a status from the **Filter Printout by SAP Status** drop-down list before you click Print.

    The Report Selection form is displayed and offers Student Name, SAP Status, School Status, and Program Version as sort variables. Make your selections and then click the Preview button.

    The following is an example of a cumulative SAP report.



SAP Report

lst_adSAP.rpt
ADMINISTRATOR

Sorted by: Student Name

10/11/2012
1:59:17PM

Student Name / Program Version	School Status / SAP Status / SAP Reason	GPA	Num Avg. / Linked SAP Enroll	Curr. GPA	Current Num Avg.	Units Attempted	Units Earned / Min.%	Hours Attended / Comp.	Action if Failed / Checkpoint / Fail Seq.	SAP Evaluation Date
Abbott, Victoria	Leave of Absence	0.00	0	0.00	0	3.00	0.00	0.00		
	SAP Not Met						0%			2
	Cumulative GPA (0.00) is less than minimum GPA (1.50).							2		
Bach. of General Management			Bach. of General Management(Transfer To Other Program)							
Abel-McHann, Jacqueline	Active	0.00	0	0.00	0	0.00	0.00	0.00		
	Not Evaluated						0%			0
	SAP Not Evaluated. No units were attempted.									
Bach. of General Management			Bach. of General Management(Transfer To Other Program)							
Abel-McHann, Jacqueline	Attending	0.00	0	0.00	0	0.00	0.00	0.83		
	Not Evaluated						0%			0
	SAP Not Evaluated. No units were attempted.									
Marketing Version Catalog										
Aberdoon, Craig	Attending	4.00	0	4.00	0	14.00	14.00	11.00		
	SAP Met						100.00%			0
	SAP Met based on hours and attending status.									
Associate in Financial Management										
Aberle, Vincent	Recommend Suspension	4.00	59.4	4.00	59.4	5.00	5.00	47.08		
	Not Evaluated						100.00%			2
	SAP Not Evaluated no matching checkpoint criteria.									
Bach. of General Management										
Abner, Chris	Attending	0.00	0	0.00	0	0.00	0.00	12.00		
	Not Evaluated						0%			0
	SAP Not Evaluated. No units were attempted.									
Distance Education (9903)										
Abraham, Pedro	Attending	4.00	0	4.00	0	3.00	3.00	21.90		
	SAP Met						100.00%			0
	SAP Met based on hours and attending status.									
Criminology BA										
Acker, Bill	Leave of Absence	1.67	72.75	1.67	72.75	12.00	8.00	55.53		
	SAP Met						66.67%			0
	Student can not complete the required (credits) (0.00) within the maximum allowable time frame, due to remaining required (credits) (-8.00) exceeding the allowable attempts remaining (-4.00). Units attempted (12.00) are greater than (150%) of units required (0.00).							1		
Bachelor in General Management										

Campus Management

Page 1 of 24

The SAP Report is the same for manual and automated SAP evaluation. All SAP Detail criteria are evaluated and the associated failure reasons are listed on the report.

SAP Reports based on payment period are similar to term-based SAP Reports, except they include columns for PP (Payment Period) Count and Academic Year/Payment Period instead of Term and Term Sequence number. SAP reports based on payment periods include data in the SAP Evaluation Date field.

14. If you choose to complete the SAP calculation process, click **Finish**. You are prompted to confirm if it is okay to post the SAP results. Click **Yes** to post the calculation. If after reviewing the list, you choose not to post the calculation, click **Cancel**.

15. When the posting is done, a message is displayed asking if you want to print a report. Click **Yes** to print the report and complete the Report Selection form as needed. If you have already printed the report, click **No** to exit the wizard.

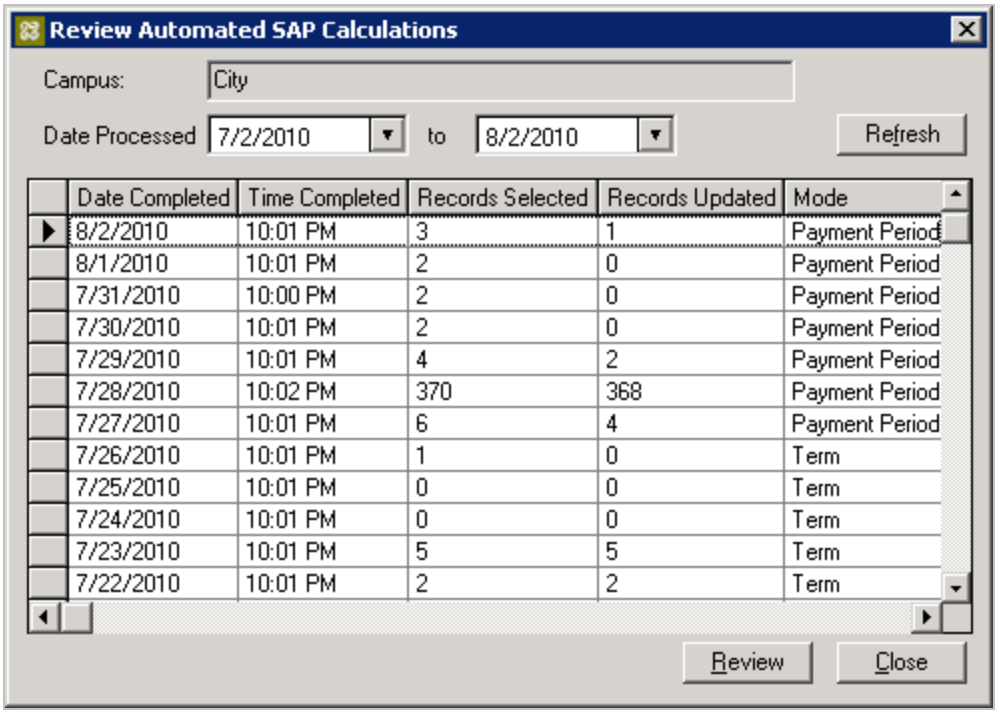
Reviewing Automated SAP Calculations

When CampusNexus Student is configured to perform Automated SAP Calculations, users can view a summary of the Automated SAP Calculations that have taken place. In addition, it is possible to view a report listing the results of a particular instance of the Automated SAP Calculations.

To access the Review Automated SAP Calculations form, the system administrator must have enabled **Automated SAP reporting on Daily Menu** for the campus.

To review Automated SAP Calculations:

1. Select **Daily > Academic Records > Review Automated SAP Results**. The Review Automated SAP Calculations form is displayed.
2. Enter a range of dates in the **Date Processed** and **To** fields encompassing the dates on which Automated SAP Calculations were done.
3. Click **Refresh**. A listing of all Automated SAP Calculations that took place between the selected dates is displayed.



Date Completed	Time Completed	Records Selected	Records Updated	Mode
8/2/2010	10:01 PM	3	1	Payment Period
8/1/2010	10:01 PM	2	0	Payment Period
7/31/2010	10:00 PM	2	0	Payment Period
7/30/2010	10:01 PM	2	0	Payment Period
7/29/2010	10:01 PM	4	2	Payment Period
7/28/2010	10:02 PM	370	368	Payment Period
7/27/2010	10:01 PM	6	4	Payment Period
7/26/2010	10:01 PM	1	0	Term
7/25/2010	10:01 PM	0	0	Term
7/24/2010	10:01 PM	0	0	Term
7/23/2010	10:01 PM	5	5	Term
7/22/2010	10:01 PM	2	2	Term

Note: The Mode column displays *Term* if the results are for *Term SAP* or *Payment Period* if the results are for *Payment Period SAP*. The SAP job runs for term regardless how the campus is configured. If Payment Period is set to run, then SAP evaluates the Payment Period.

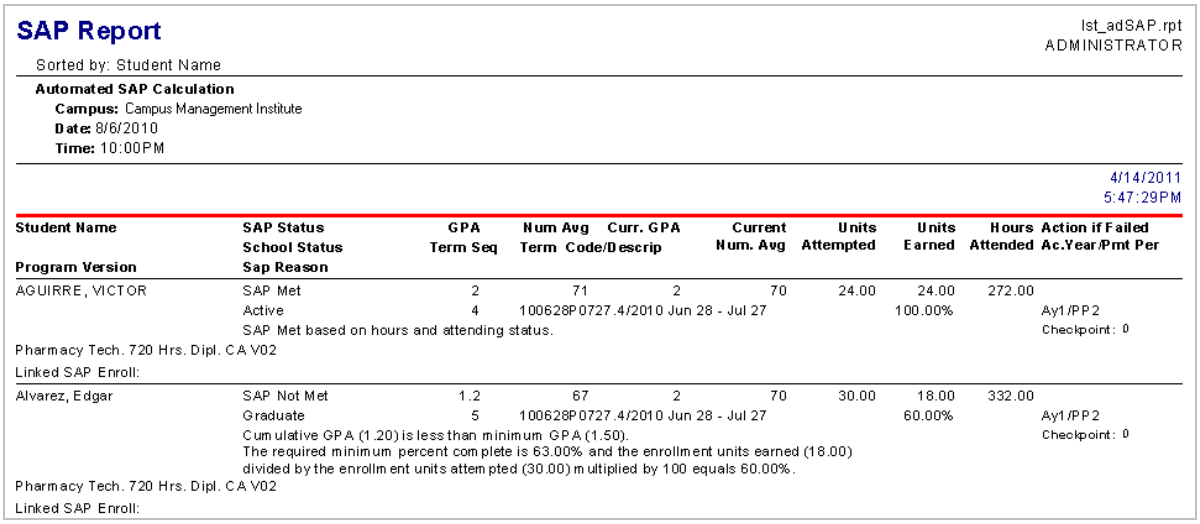
4. A listing of all students whose SAP was calculated as part of an Automated SAP Calculation batch process is available. To generate this report, highlight the row corresponding to the desired batch.
5. Press **Preview**. A Report Selection form is displayed.
6. If desired, the report may be sorted by Student Name, SAP Status, School Status, or Program Version. The default

sort is set to Student Name. Move the desired sort variables to the Selected Sort Order field.

7. Press the **Preview** button on the report selection form.

   A report entitled **SAP Report** is produced. For each student processed it lists the SAP Status, GPA, Numeric Average, Current GPA, Current Numeric Average, Units Attempted, Units Earned, Hours Attended, Action if Failed, Academic Year/Payment Period (AY/PP), all SAP Failure Reasons, and if applicable, Linked SAP Enroll (ments), and, depending on the SAP Setup, the Academic Year Evaluation Point and the SAP Evaluation Date.

   Note: It is not possible to click on the student's name in the report and have CampusNexus Student automatically retrieve the Student Master Record as occurs in some other CampusNexus Student reports. Instead, create a Student Group from the report using the menu option at the top of the report viewer. You may then view the students in the group and double-click on the student's name to view the Student's Master Record.



SAP Report

lst_adSAP.rpt
ADMINISTRATOR

Sorted by: Student Name

Automated SAP Calculation
Campus: Campus Management Institute
Date: 8/6/2010
Time: 10:00PM

4/14/2011
5:47:29PM

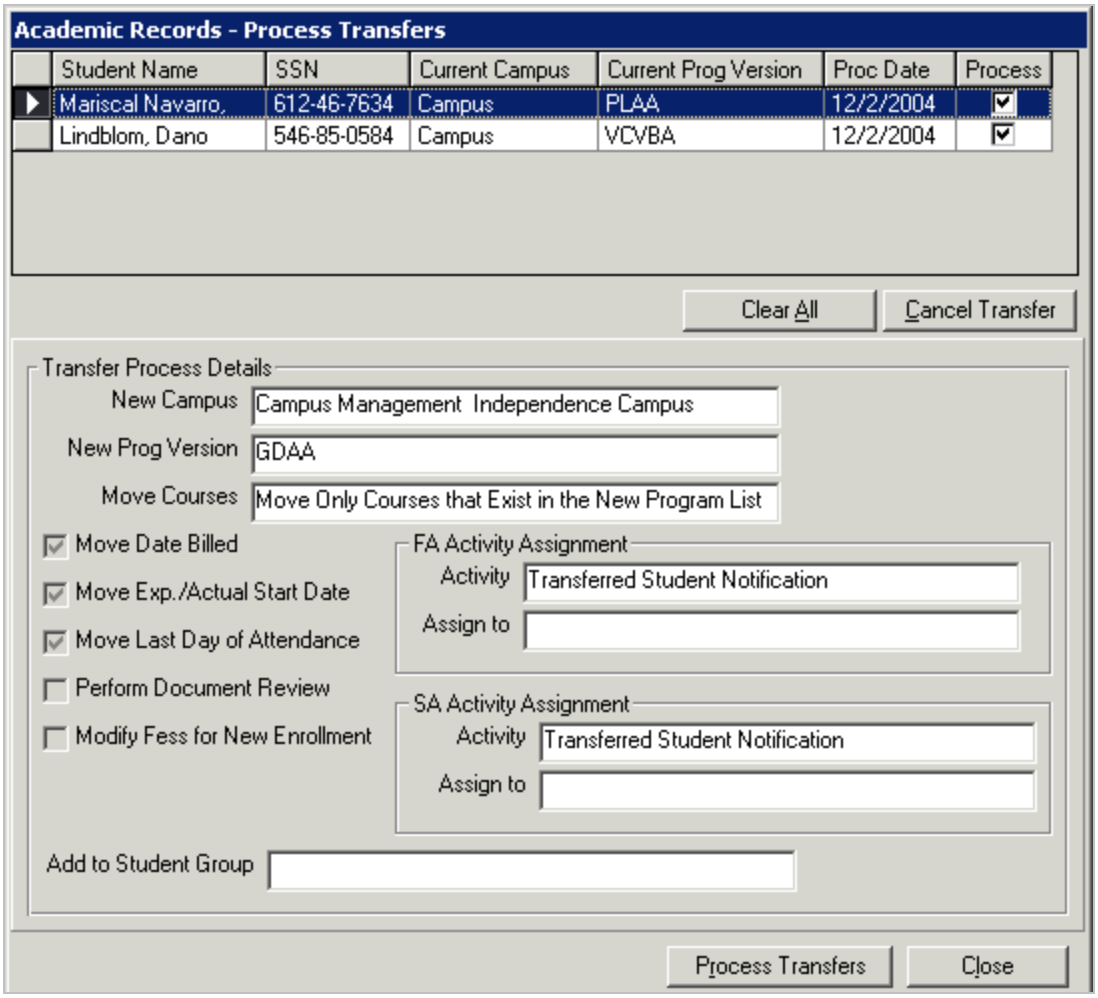
Student Name / Program Version	SAP Status / School Status / Sap Reason	GPA / Term Seq	Num Avg / Term	Curr. GPA / Code/Descrip	Current Num. Avg	Units Attempted	Units Earned	Hours Attended	Action if Failed / Ac.Year/Pmt Per
AGUIRRE, VICTOR	SAP Met	2	71	2	70	24.00	24.00	272.00	
	Active	4	100628P0727.4/2010 Jun 28 - Jul 27				100.00%		Ay1/PP2
	SAP Met based on hours and attending status.								Checkpoint: 0
Pharmacy Tech. 720 Hrs. Dipl. CA V02									
Linked SAP Enroll:									
Alvarez, Edgar	SAP Not Met	1.2	67	2	70	30.00	18.00	332.00	
	Graduate	5	100628P0727.4/2010 Jun 28 - Jul 27				60.00%		Ay1/PP2
	Cumulative GPA (1.20) is less than minimum GPA (1.50). The required minimum percent complete is 63.00% and the enrollment units earned (18.00) divided by the enrollment units attempted (30.00) multiplied by 100 equals 60.00%.								Checkpoint: 0
Pharmacy Tech. 720 Hrs. Dipl. CA V02									
Linked SAP Enroll:									

Process Queued Transfers

This menu option is used to process student transfers that have been queued up to wait for a certain date before processing. You can view or print transfers currently waiting to be processed and cancel a queued transfer. Transfers are initiated on an individual student basis from their enrollment folder. They can be scheduled to occur at a time selected by the user who records the transfer.

To process queued transfers:

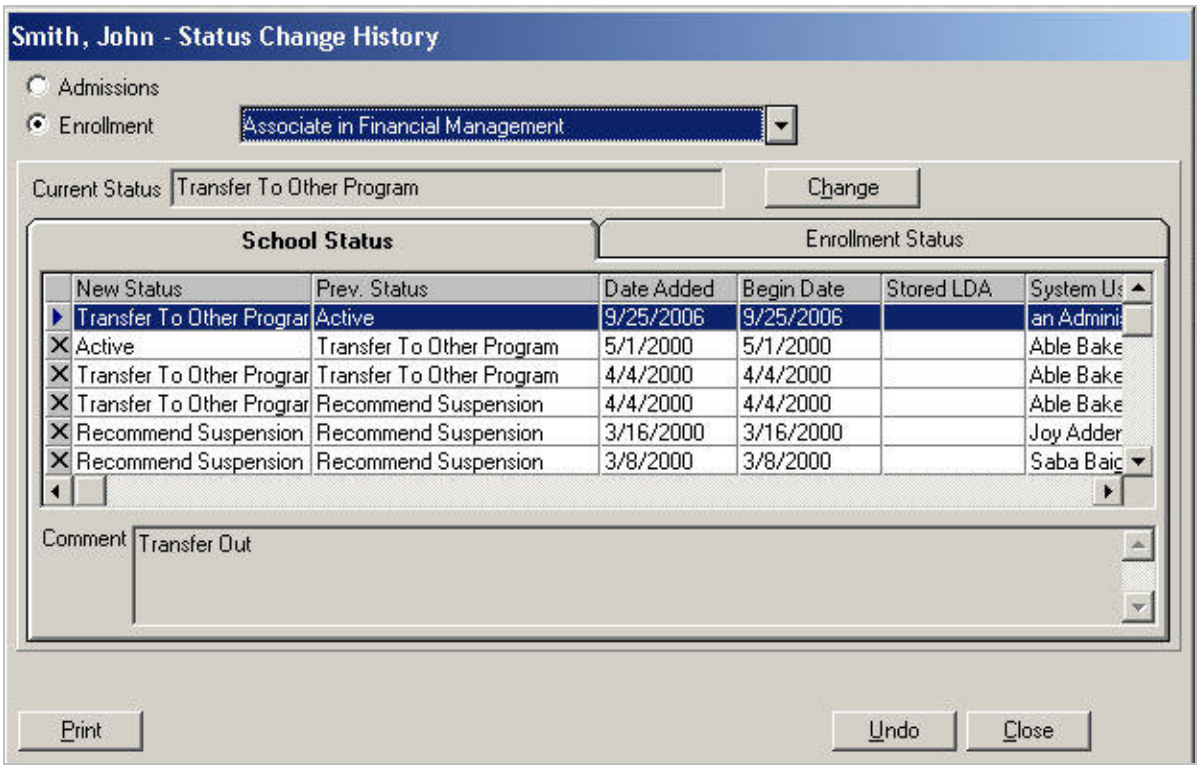
1. Navigate to **Daily** > **Academic Records** > **Process Queued Transfers**. The **Academic Records - Process Transfers** form is displayed.



2. You can select a student and click **Cancel Transfer** to remove the student from the list, or select the **Clear All** button to clear all **Process** check boxes.
3. You can also edit the **Proc Date** to a date later than the system date and clear the **Process** check box, or you can set the date to today's date or earlier and select the **Process** check box.
4. When you click **Process Transfers** at the bottom of the form, all transfer records with the **Process** check box selected will be processed. A message shows the number of pending transfer records. Click **Yes** to continue or **No**

to return to the previous screen.

5. A confirmation message is displayed. Click **OK**.
6. You may verify the transfer by navigating to the student's enrollment form and selecting the Status History button. The New Status will contain 'Transfer to Other Program' as the student's status.

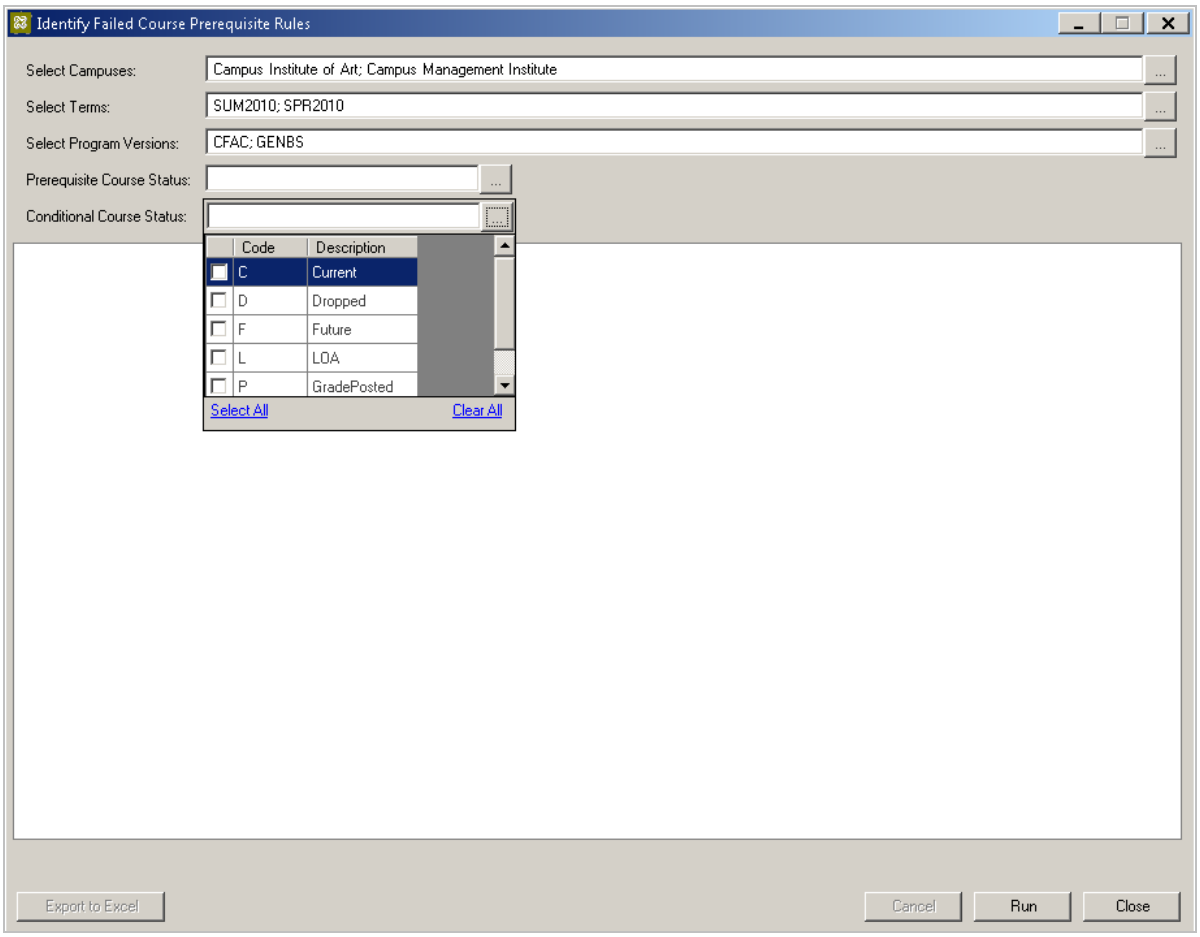


Identify Failed Course Prerequisite Rules

This menu item can be used to identify students who are not meeting the course prerequisite rule(s) for a conditional course they are registered for. Report results can be filtered by conditional course status and/or prerequisite course status, and can be exported to Excel as needed.

To identify failed course prerequisite rules:

1. Navigate to **Daily** > **Academic Records** > **Identify Failed Course Prerequisite Rules**. The Identify Failed Course Prerequisite Rules form is displayed.



2. Use the **Select Campuses** multi-select combo box to select the applicable campus(es). This list will be populated with the active campuses to which you have access, sorted by campus description. You must select at least one campus to be able to run the report.

   Note: The **Term** and **Program Version** combo boxes will remain unavailable and unpopulated until you select the campus(es).

3. Use the **Select Terms** multi-select combo box to select the applicable term(s). Terms are initially listed in descending order by end date, then by code. You must select at least one term to be able to run the report.

Note: A "dummy" Future Term is included in the Term combo box so that you can also identify unregistered pre-requisite courses.

4. Use the **Select Program Versions** multi-select combo box to select the applicable program version(s).

   Note: Program versions are listed by querying active programs for the selected campus(es), and are initially arranged in ascending alphabetical order based on code.

5. Use the **Prerequisite Course Status** and **Conditional Course Status** multi-select combo boxes to select the applicable course status(es). In each case, the possible values are:

   - Current (C)
   - Dropped (D)
   - Future (F)
   - LOA (L)
   - Grade Posted (P)
   - Scheduled (S)

   Note: Course status selections are only used to filter the failed course prerequisite rules being gathered for the report, i.e., to reduce the amount of data shown.

6. Click **Run** to generate the report. The report will run in the background, so you can continue using CampusNexus Student while it is running. If necessary, you may **Cancel** the report after the records to be processed are gathered and the report begins to process each record.

   Note: A label will appear in the lower left corner of the form, showing the current record being processed and the total number of records to be processed. In addition, a progress bar is displayed indicating the progress of report generation.

7. Upon completion of report generation, results are displayed in a grid in the form of a hierarchical tree grouped by campus and sorted by program version first, then by student name. You can change the default sort order in any column by clicking the grid column header. You can rearrange the columns in the grid by dragging them to the desired location.

   Note: Details for a particular student can be expanded/collapsed by clicking the +/- icon that appears to the left of the corresponding student record.

8. If applicable, use the **Export to Excel** button to export the report results to an Excel spreadsheet.

9. Click **Close** to close the form.

Report Configuration Academic Records THECB Reports

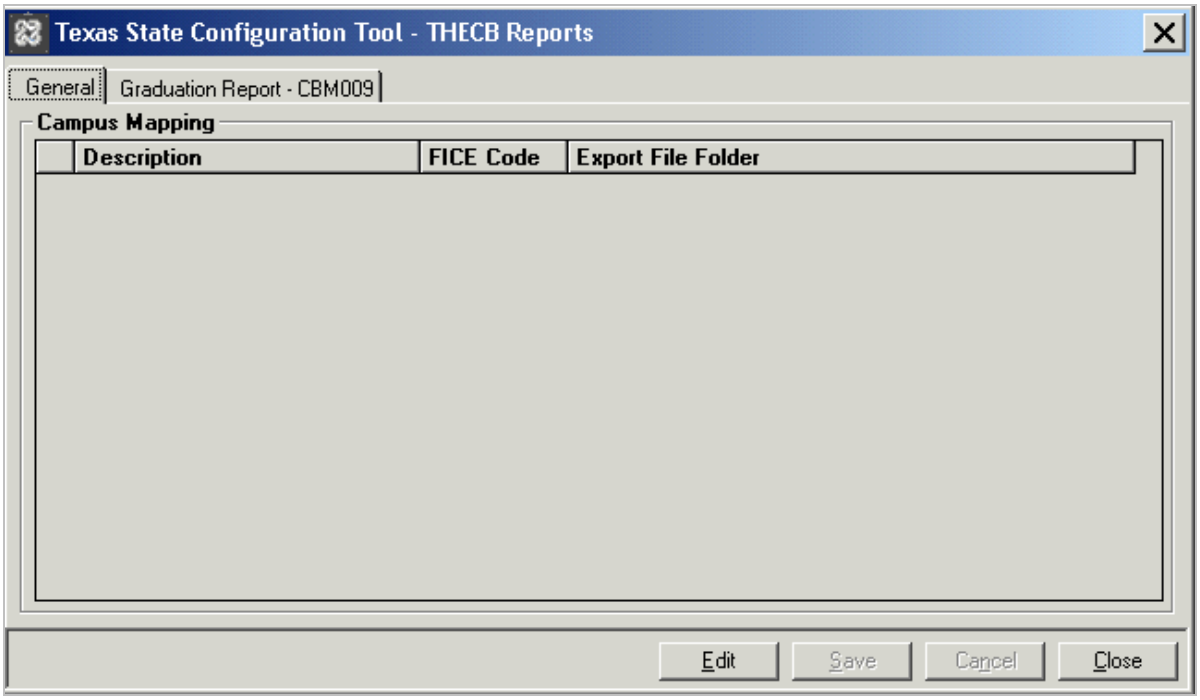
In Texas State, each participating institution has to submit an annual graduation report (CBM009) to the Texas Higher Education Coordinating Board (THECB).

The Graduation Report (CBM009) is an annual report due to THECB on November 1st. The report should reflect awards conferred during the academic year immediately preceding the fall semester in which the report is submitted. For example, the report due November 1, 2005 should reflect data from July 1, 2004 through June 30, 2005.

Each Graduation Report (CBM009) report must be configured before it can be generated and extracted.

To configure THECB reports:

1. Navigate to **Daily > Academic Records > Export Data > State Reporting > Texas > THECB-Configuration**. The Texas State Configuration Tool - THECB Reports form is displayed.



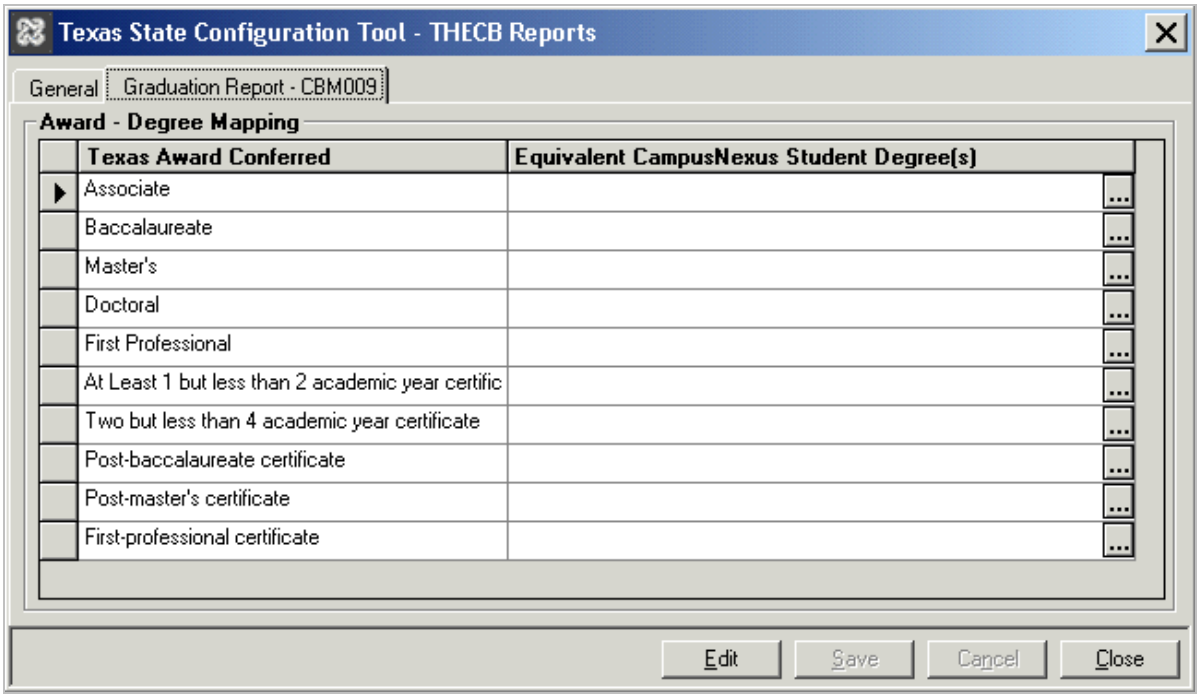
2. On the General Tab for Campus Mapping a list of campuses will appear and you can enter the FICE code and Export File Folder for each campus. More than one campus can have the same FICE code. Click the Edit button to modify the campus mapping information and enter the FICE code and Export File Folder information. Click ... to specify the path where the export file will be placed once it is generated. Click the Save button to save information or the Cancel button to restore the information to its original state.

   Note: An information message will appear if the FICE code is not numeric or the length of the FICE code that you entered is not six digits.

Graduation Report - CBM009 Configuration

To Configure the report:

1. Select the appropriate degree listed in the Equivalent CampusNexus Student Degree(s) in the right-hand column and match it with the appropriate "Award Conferred" for your state in the left-hand column. The same CampusNexus Student Degree(s) can be mapped to different Awards Conferred. If there are no listings for Equivalent CampusNexus Student Degree(s) , click ... and make a selection.
2. Click **Save** to save the Award - Degree mapping.



Note: A Warning! message will appear if you attempt to exit the window without associating at least one CampusNexus Student Degree with a State Award Conferred. If you do not want to finish configuring the report, click **Cancel**and **Close** button to exit the window. To finish configuring the report, select the CampusNexus Student degrees and associate them with the state award conferred.

See also Report Extract Academic Records THECB Reports for information regarding extracting and generating the Graduation Report (CBM009) and Student Enrollment (CBM001) reports.

Report Configuration Academic Records THECB Reports

In Texas State, each participating institution has to submit an annual graduation report (CBM009) to the Texas Higher Education Coordinating Board (THECB).

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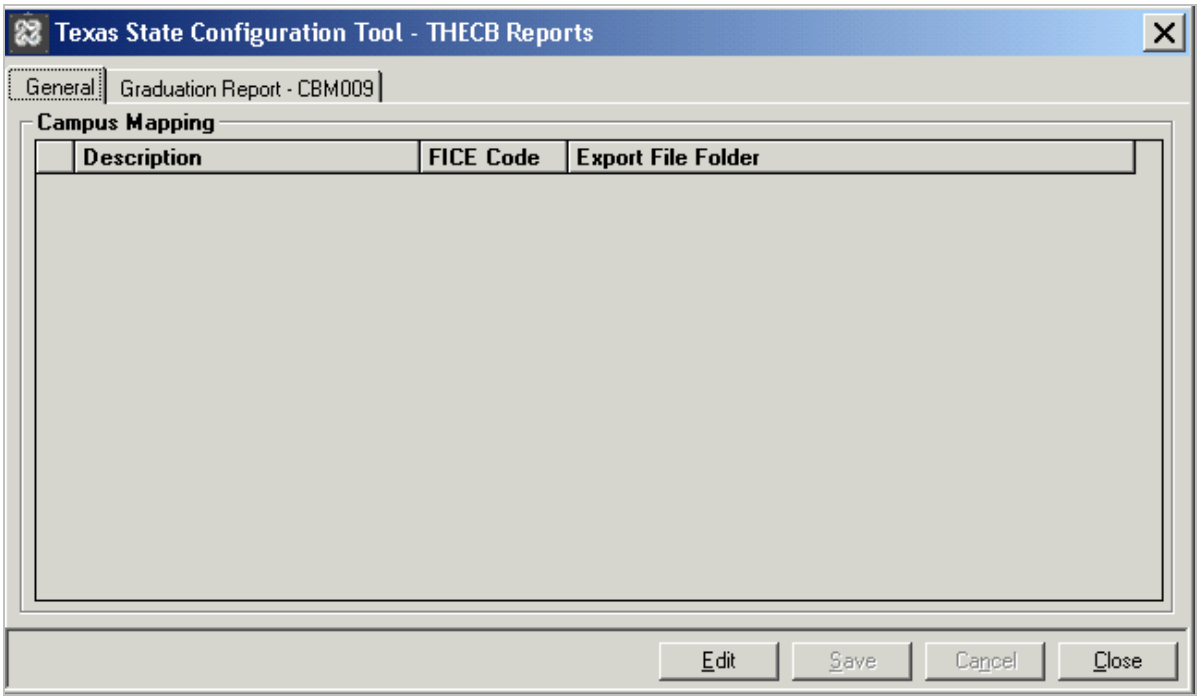


2. On the General Tab for Campus Mapping a list of campuses will appear and you can enter the FICE code and Export File Folder for each campus. More than one campus can have the same FICE code. Click the Edit button to modify the campus mapping information and enter the FICE code and Export File Folder information. Click ... to specify the path where the export file will be placed once it is generated. Click the Save button to save information or the Cancel button to restore the information to its original state.

   Note: An information message will appear if the FICE code is not numeric or the length of the FICE code that you entered is not six digits.

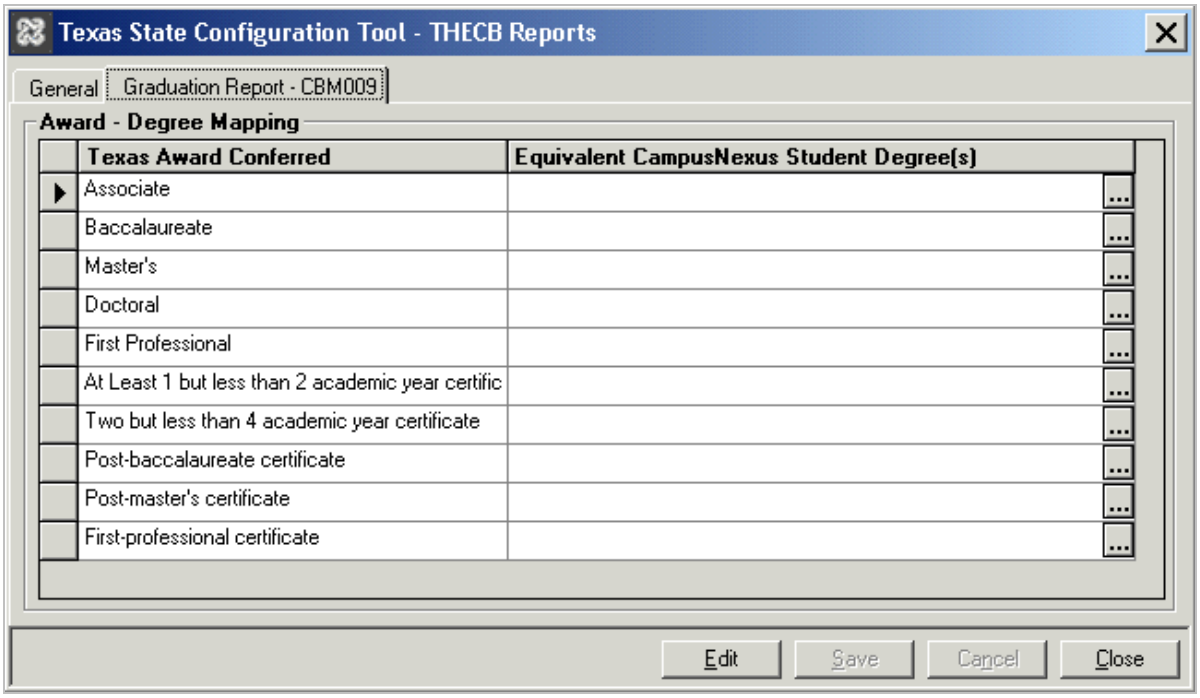
Graduation Report - CBM009 Configuration

To Configure the report:

1. Select the appropriate degree listed in the Equivalent CampusNexus Student Degree(s) in the right-hand column and match it with the appropriate "Award Conferred" for your state in the left-hand column. The same CampusNexus Student Degree(s) can be mapped to different Awards Conferred. If there are no listings for Equivalent

CampusNexus Student Degree(s) , click ... and make a selection.

2. Click **Save** to save the Award - Degree mapping.



Note: A Warning! message will appear if you attempt to exit the window without associating at least one CampusNexus Student Degree with a State Award Conferred. If you do not want to finish configuring the report, click **Cancel**and **Close** button to exit the window. To finish configuring the report, select the CampusNexus Student degrees and associate them with the state award conferred.

See also Report Extract Academic Records THECB Reports for information regarding extracting and generating the Graduation Report (CBM009) and Student Enrollment (CBM001) reports.

Report Extract Academic Records THECB Reports

In Texas State, each participating institution has to submit two types of reports to the Texas Higher Education Coordinating Board (THECB)

1. A student enrollment report (CBM001) for both the spring and fall semesters and

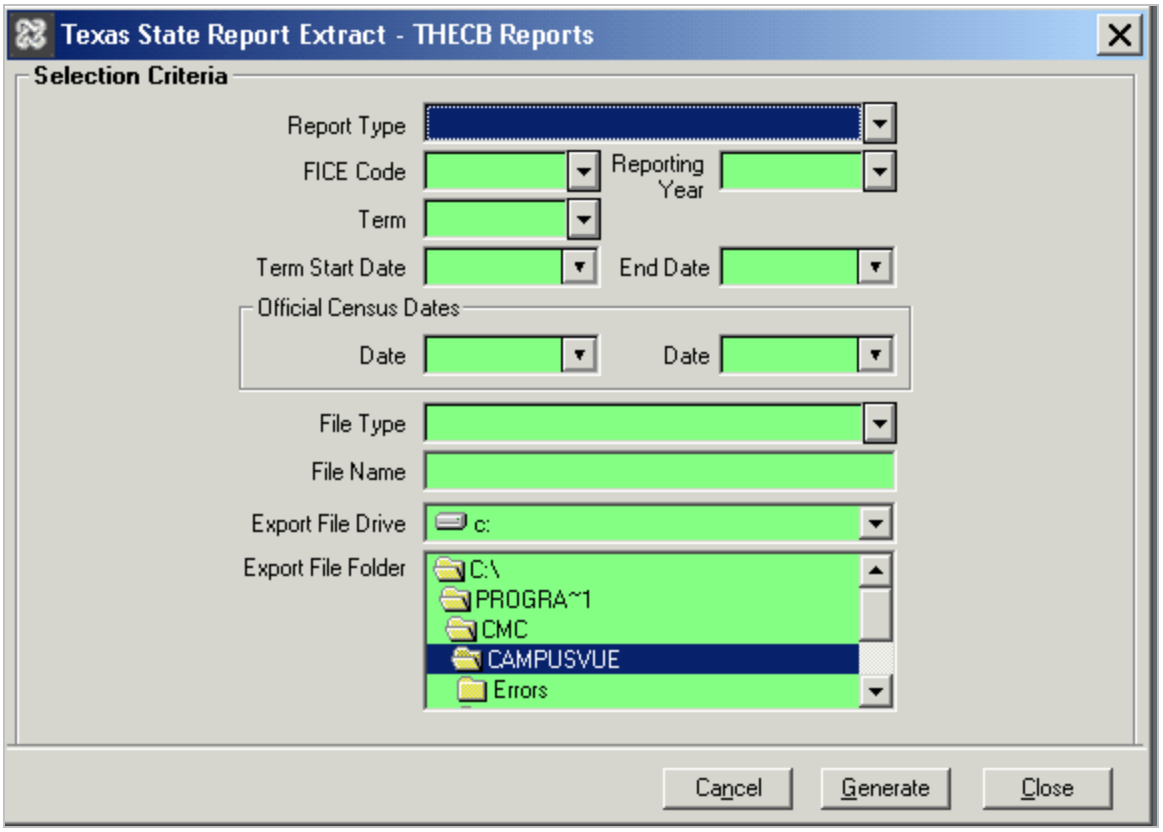
2. An annual graduation report (CBM009)

The Student enrollment report (CBM001) reflects all students enrolled at the reporting institution as of the institution's official census date for the semester (spring and fall) where the Official census date refers to the date set by Department of Education, Science and Training (DEST) that academic and financial penalties are applied. If a student withdraws from the institution on or before the official census date, they must not be included in this report.

The Graduation Report (CBM009) is an annual report due to THECB on November 1st. The report should reflect awards conferred during the academic year immediately preceding the fall semester in which the report is submitted. For example, the report due November 1, 2005 should reflect data from July 1, 2004 through June 30, 2005. The Graduation Report (CBM009) report must be configured before it can be generated and extracted. Click here for configuration instructions for this report before proceeding to *extract* the Graduation Report (CBM009).

To extract and generate THECB reports:

Navigate to **Daily > Academic Records > Export Data > State Reporting > Texas > THECB-Extract**. The Texas State Report Extract - THECB Reports form is displayed.



Student Enrollment Report (CBM001)

1. Select the "Student Enrollment Report - CBM001" from the "Report Type" drop-down list.
2. Select the appropriate FICE code from the drop-down list.

3. Notice the "Reporting Year" field is disabled. It is not needed for this report.
4. Select the "Term" from the drop-down list. The options are Fall or Spring.
    - If "Fall" is chosen for Term, the "Official Census Dates" labels will display Summer and Fall date options.
    - If "Spring" is chosen for Term, the "Official Census Dates" labels will display Winter and Spring date options.
5. Select the "Term Start Date" and "End Date" from the drop-down lists. The start date must be a date before the end date. The Term Start and End Dates can be any valid date.
6. Select the appropriate "Official Census Dates" from the drop-down list of dates. These dates should be within the start and end date of the Term selected above.
7. Select the appropriate "File type" from the drop-down list. You may generate a flat file or excel spreadsheet.
8. Enter the filename in the "File Name" data entry field. A file name will be generated automatically in the format as CBM001_Term_FICECODE_DateTimeStamp (YYYYMMDDHHMMSS). For example, CBM001_Fall_001234_20051104121224. You can change the file name. In case the user selects Excel as the file type, the filename field will be blank and disabled/not required. The folder path will also be disabled/not required.
9. Find the appropriate Export File Drive from the drop-down list and select it.
10. Find the appropriate Export File Folder from the drop-down list and select it.
11. Click the "Generate" button to generate the report.

An confirmation message will appear when the file has been generated with the path information where the file resides.

Graduation Report (CBM009)

1. Select the "Graduation Report - CBM009" from the "Report Type" drop-down list.
2. Select the appropriate FICE code from the drop-down list.
3. Select the appropriate "Reporting Year" from the drop-down list of dates.
4. Select the appropriate "File type" from the drop-down list. You may generate a flat file or excel spreadsheet.
5. Enter the filename in the "File Name" data entry field. A file name will be generated automatically in the format as CBM009_Graduation_Report yr_FICE CODE Date/Time Stamp (YYYYMMDDHHMMSS).

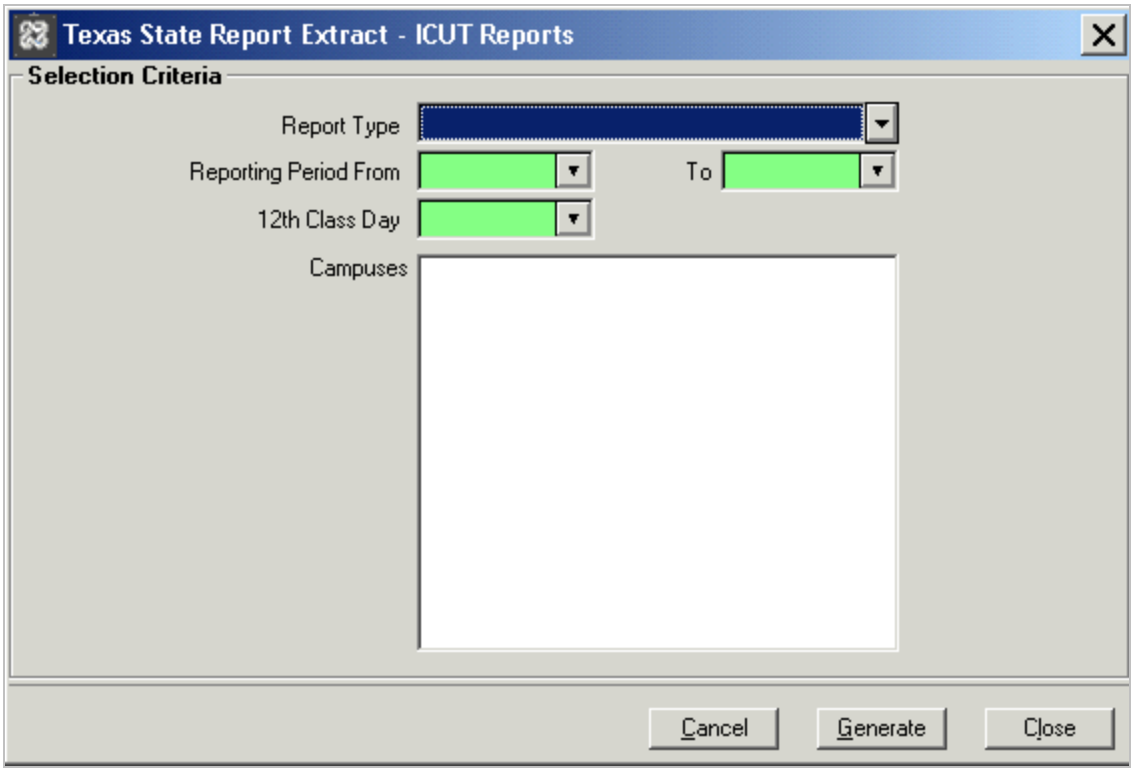
    For example, CBM009_Graduation_2005_001234_20051104121224.,when reporting year selected is 2004-05 and FICE Code is 001234. You can change the file name. To create an Excel spreadsheet as the file type, the filename field will be blank and disabled/not required. The folder path will also be disabled/not required.
6. Find the appropriate Export File Drive from the drop-down list and select it.
7. Find the appropriate Export File Folder from the drop-down list and select it.
8. Click the "Generate" button to generate the report.

Report Extract Academic Records ICUT Reports

The Independent Colleges and Universities for Texas (ICUT) reports for Academic Records Aid do not need to be configured.

To extract and generate ICUT reports:

Navigate to **Daily > Academic Records > Export Data > State Reporting > Texas > ICUT-Extract**. The Texas State Report Extract - ICUT Reports form is displayed.



Fall Enrollment by Ethnicity Report

1. Select the "Fall Enrollment by Ethnicity Report" from the "Report Type" drop-down list.
2. Select the appropriate "Reporting Period From" and "To" dates.
3. Select the appropriate "12th Class Day" date from the drop-down list of dates.
4. Select the campuses that you would like to be included in the ICUT report.
5. Click the "Generate" button to generate the report.

Survey of Freshman Retention Report

1. Select the "Survey of Freshman Retention Report" from the "Report Type" drop-down list.
2. Select the appropriate "Reporting Period From" and "To" dates.
3. Select the appropriate "12th Class Day" date.
4. Select the campuses that you would like to be included in the ICUT report.
5. Click the "Generate" button to generate the report.

Twelfth Day Headcount Enrollment Report

1. Select the "Twelfth Day Headcount Enrollment Report" from the "Report Type" drop-down list.
2. Select the appropriate "Reporting Period From" and "To" dates.
3. Select the appropriate "12th Class Day" date.
4. Select the campuses that you would like to be included in the ICUT report.
5. Click the "Generate" button to generate the report.

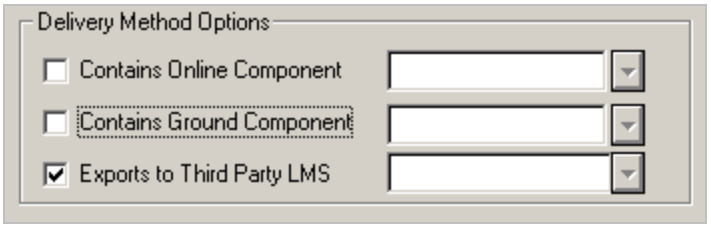
Registration Extract Status

The **Registration Extract Status** tool allows you to change the LMS extract status of selected records and resubmit them to the LMS. You can change the extract status of a single record or in a batch of multiple records.

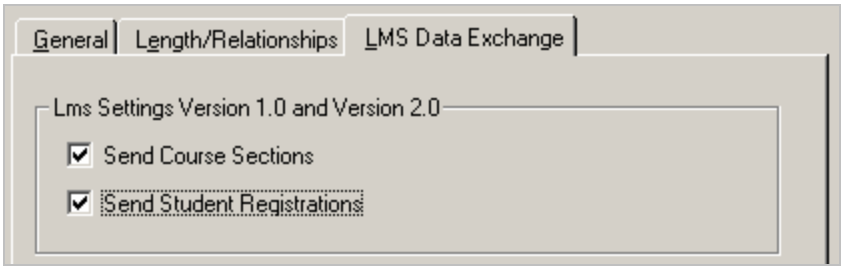
Configuration Setup Options

This option will only be available if certain configurations are set up prior to using this tool.

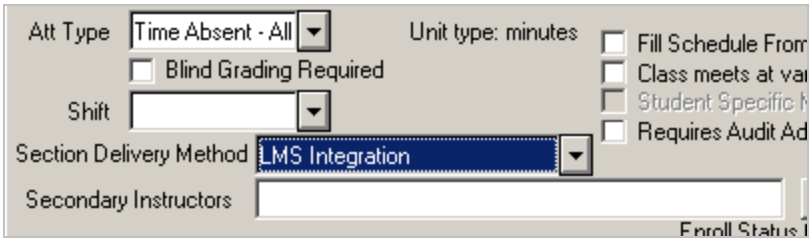
1. The Delivery Method should be configured for LMS Data exchange from Lists > Academic Records > Delivery Method (tab). The **Export to Third Party LMS** check box should be selected.



2. The Term should be configured for LMS Data Exchange from Lists > Academic Records > Term > LMS Data Exchange (tab).



3. The Course Section should be configured to use the Delivery Method in the above setting within Daily > Academic Records > Schedule Classes > Add/Edit (button).

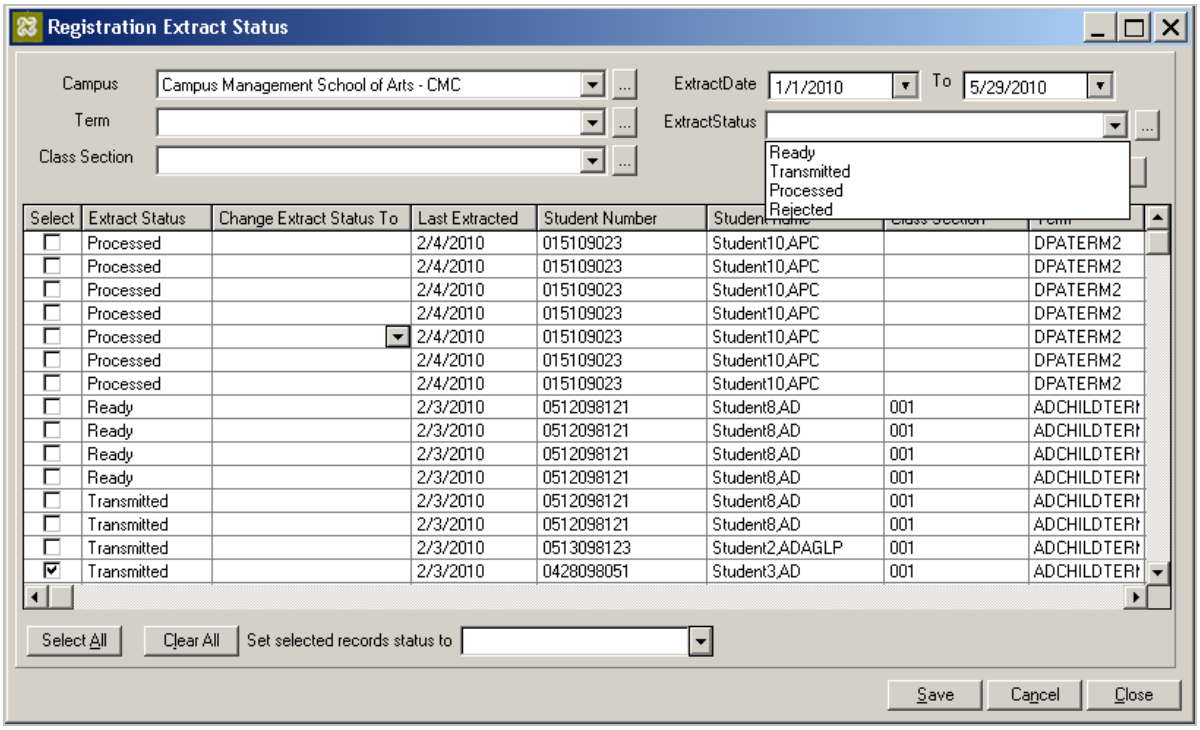


Key to Registration Extract Statuses

Status	Description
Ready	The status when records are Registered, Unregistered, Dropped, Reinstated or Transferred into LMS course sections and terms via CampusNexus Student/Portal/CampusLink API.
Transmitted	The API will change a record in Ready status to Transmitted status when records are extracted successfully.

Status	Description
Processed	After a record has been transmitted, this is the status produced by the Acknowledgement API to indicate that the process was successfully executed.
Rejected	After a record has been transmitted, this is the status produced by the Acknowledgement API to indicate that the process was NOT successfully executed.

Filtering Records



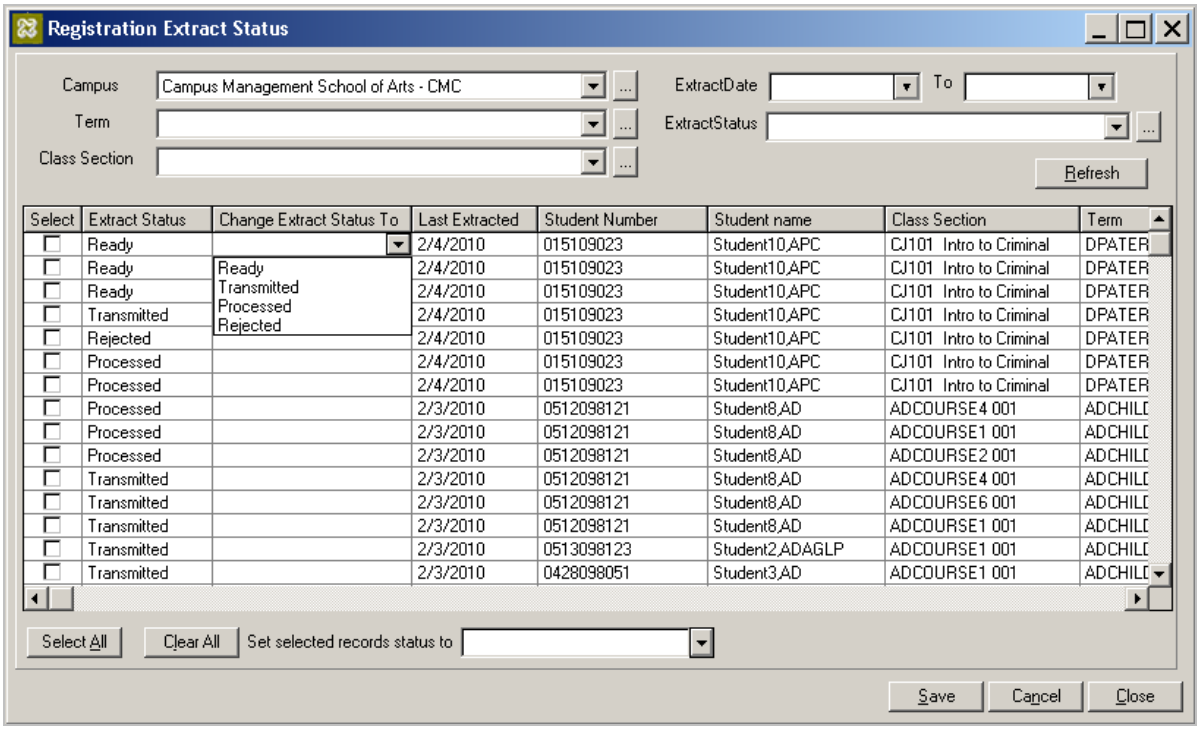
You can filter the records you would like to view and/or update by filtering on the following search criteria:

- Campus - filter by campus. Click ... to select multiple campuses.
- Term - filter on the term(s) that belong to the campus(es). selected in the Campus list. Click ... to select multiple terms.
- Class Section - filter on the class section(s) which belong to the term(s) selected in the Term list. Click ... to select multiple class sections.
- Extract Date (from and to dates) - filter on any valid date range.
- Extract Status - filter on Ready, Transmitted, Processed and Rejected extract statuses. See Key to Registration Extract Statuses for status definitions.

When you have completed selecting your search criteria, click **Refresh**. The results that meet your search criteria will then be listed in the grid below.

Note: You must select at least one filter criteria before clicking on the Refresh button.

Results Grid



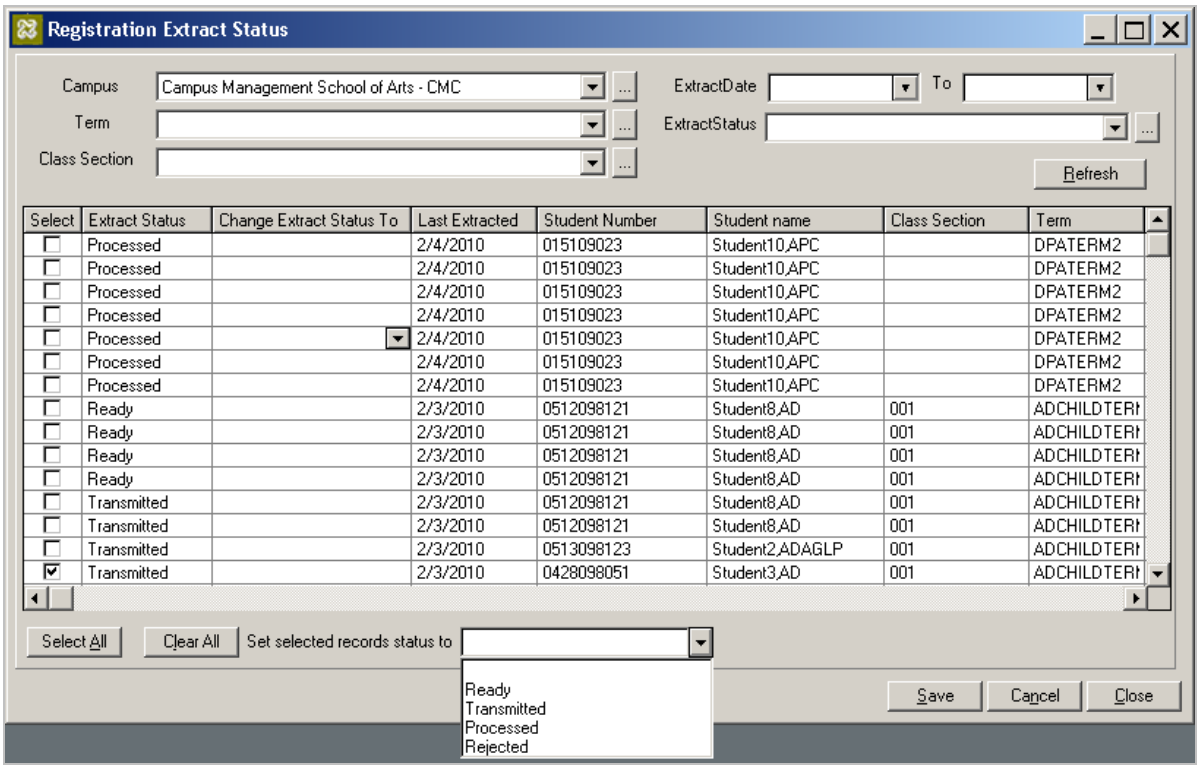
After you click **Refresh**, the following fields are populated in the grid:

- Select*- allows you to select or deselect individual record(s) for the LMS status change. By default, the records are deselected. You can also choose to select all the records at one time through Select All or deselect them through Clear All.
- Extract Status - displays the current extract status of the record.
- Change Extract Status To* - when you click on this column, a drop-down box with the values Ready, Transmitted, Processed and Rejected is displayed to select as the new extract status. See Key to Registration Extract Statuses for status definitions.

  Note: If you choose one of these options, the Select field will automatically be selected even if you had not selected this check box prior to selecting any value in the Change Extract Status To field. If you select a status in the Change Extract Status To field that is the same value as the Extract Status field, the Select check box will be deselected even if you had selected it prior to selecting any value in the Change Extract Status To field.
- Last Extracted - displays the last date that the record was extracted.
- Student Number - displays the student number.
- Student name - displays the student name.
- Class Section - displays the class section.
- Term - displays the term that the record belongs to.
- Old Status - displays the prior status of a course before the status change occurred.
- New Status - displays the new status of a course after the status change occurred.

- Action - displays the action taken to change the course status (e.g., Register).
- Campus - displays the campus that the record belongs to.

*Select and Change Extract Status To are the only editable fields in the grid.



You can click **Select All** to select all records in the grid at one time. You can then changed the status of all the records by then selecting a status in Set selected records status to. Similarly, you can click **Clear All** to deselect all records in the grid at one time. **Clear All** allows you to undo any potential extract status change selections before they are committed to the database.

Set selected records status to - you can update the **Change Extract Status To** field for ALL selected records by selecting a value in the **Set selected records status to** drop-down box. The value of all selected records will be updated as soon as you select a value from this drop-down box. By default, this drop-down box will be blank.

After selecting the extract status(es) to be changed in the **Change Extract Status To** field, click **Save** and the extract status(es) will be updated in the database and sent to the LMS. To remove all filter criteria, click **Cancel**. When you have completed your extract changes, click **Close**.

Generate Batch Transcripts

Generate Batch Transcripts enables users to save student transcripts as PDF files. This works for all transcript forms and custom transcript reports. Users can also save to PDF by individual student and each generated PDF is automatically labeled with that student's name.

Set the path for the location of the generated PDF file at: **Setup > Campus Locations > Academic Records > General**

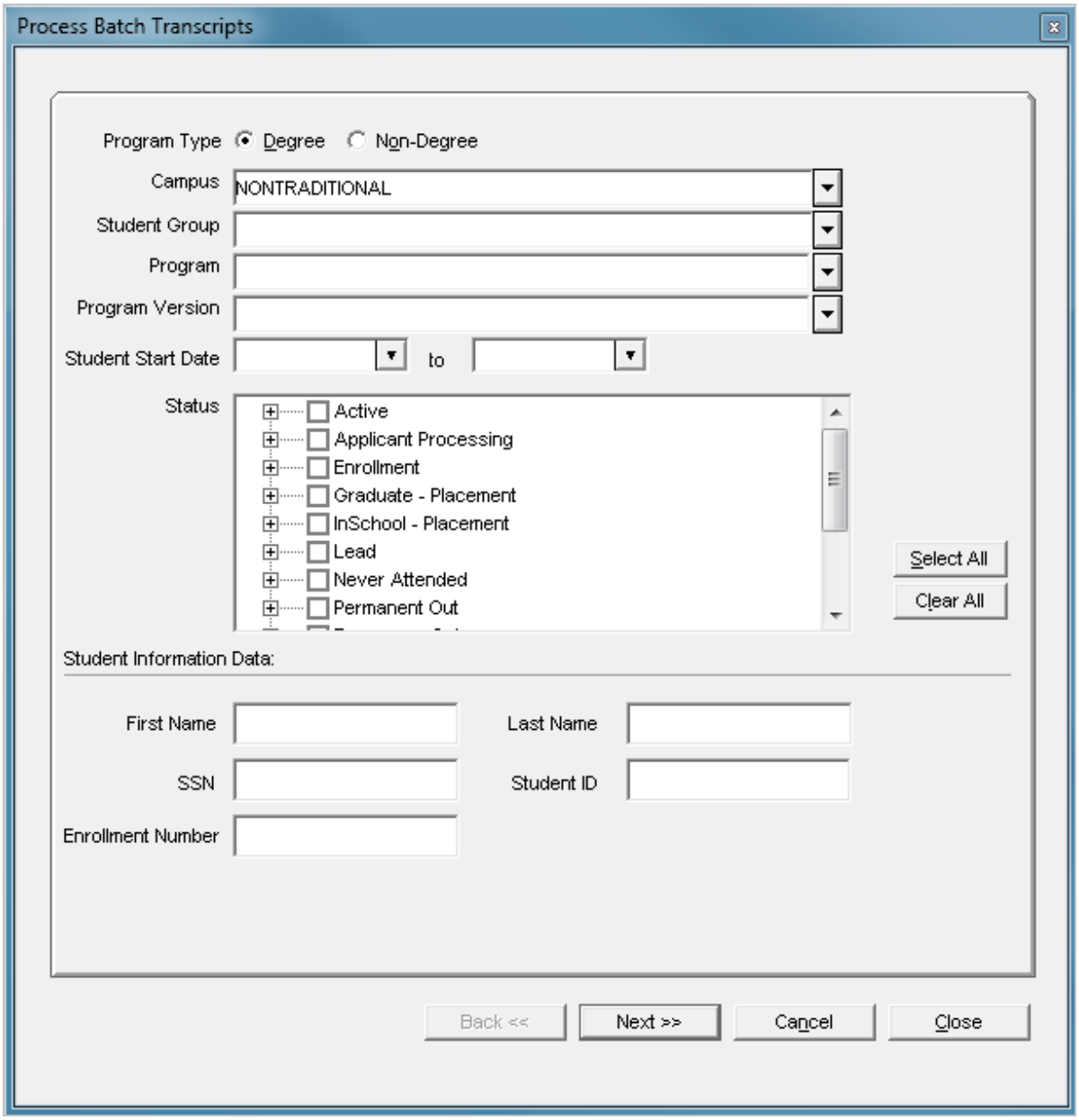
Once generated, transcript files are placed in the folder specified for that campus. If this is specified differently per campus, the files are placed in the folder for the campus that the student is associated to. If the user does not have permission to access the path the transcript files be placed, the system displays the following warning: "User does not have permissions to write to this path. Please contact your System Administrator."

The PDF can be generated for:

- Enrollment Based Transcript
- Student Based Transcript

To save transcripts as PDF files:

1. Navigate to **Daily > Academic Records > Generate Batch Transcripts**. The Process Batch Transcripts form is displayed.



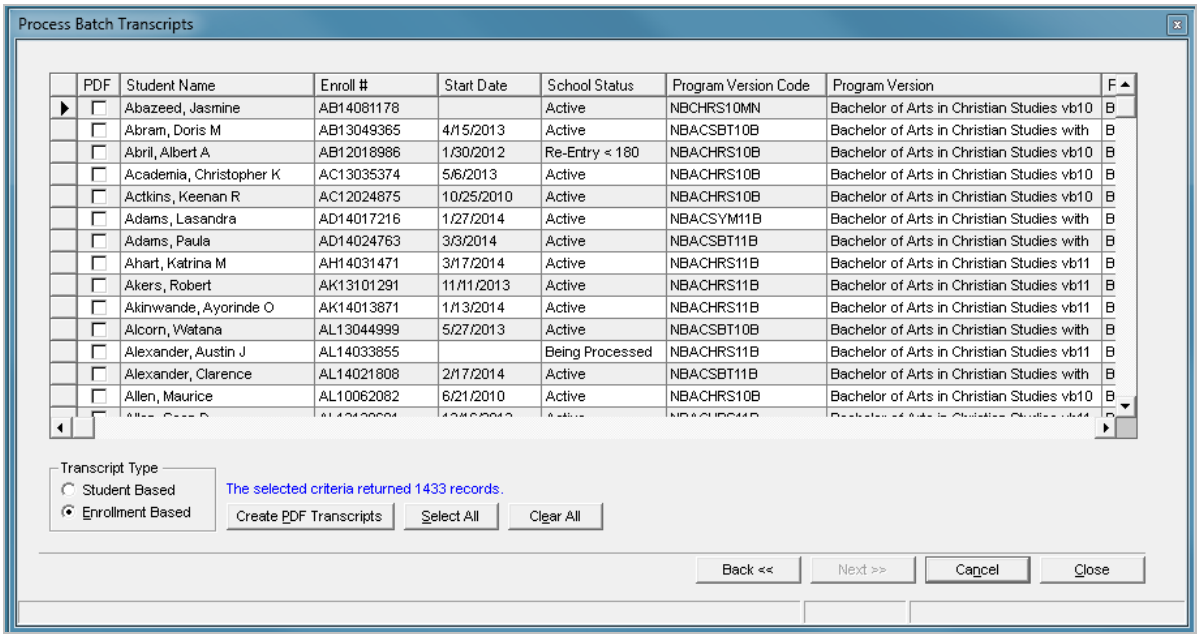
2. Specify appropriate options.

Field Descriptions

Field	Description
Program Type	Select either Degree or Non-Degree
Campus	Select the desired Campus you wish to pull transcripts from **Note**: The campuses displayed in the Campus drop-down field are regulated by the permission granted to the user currently logged in.

Field	Description
Student Group	Select the desired Student Group you wish to pull transcripts from
Program	Select the Program you wish to pull transcripts from
Program Version	Select the Program Version you wish to pull transcripts from
Student Start Date	Enter the Start Date range for the student(s)
Status	Select the Status of the student(s) you wish to pull transcripts for
First Name	Enter a specific student's First Name
Last Name	Enter a specific student's Last Name
SSN	Enter a specific student's Social Security Number
Student ID	Enter a Student ID number for a specific student
Enrollment Number	Enter an Enrollment Number for s specific student

3. Click **Next** to proceed.



Field Descriptions

Field	Description
PDF	Select the check boxes for the students whose transcripts you need

Field	Description
Transcript Type	Select the transcript type for the PDF

4. After selecting the desired students and Transcript Type, select **Create PDF Transcripts**.

   When the PDF is generated, the file is limited to a maximum limit of 1000 records. If this number is exceeded, a message will display noting this and present the option to process the first 1000 transcripts selected.

   Note: If a PDF file already exists for a given student, it is overwritten when a new transcript generation occurs for that student.

Daily > Distance Education

The Daily > Distance Education submenu options are as follows:

- Lesson Receipt
- Lesson Grading
- Course Rewrites
- Instructor Payment Processing
- <Detach> (This options detaches the submenu.)

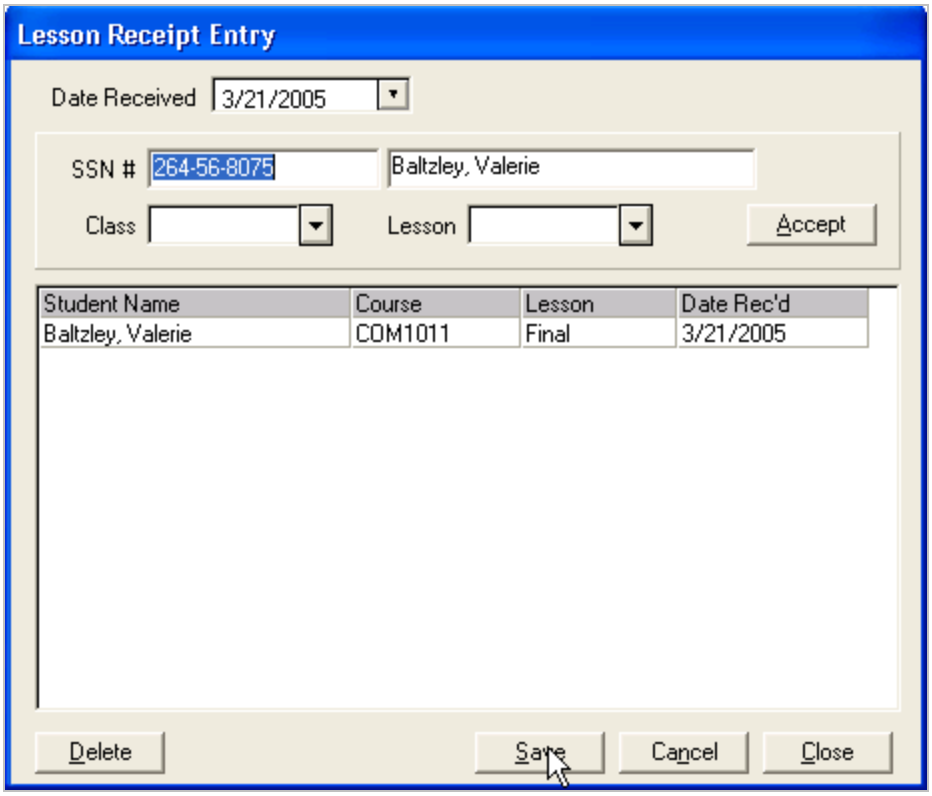
Lesson Receipt

This is a "batch" processing procedure intended for situations in which you have to enter several lesson receipts for a number of students.

You can use this form to record the receipt of lessons, exams, and book reports from your distance education students. (In the context of this procedure, lessons, exams, and book reports are handled in the same manner.) Before you can use this form, a student must be enrolled in a program version, and registered in a course or class section for which lessons, exams, and/or book reports have been set up.

To record a lesson receipt:

1. Determine the **Social Security Number** of the student from whom a lesson has been received.
2. Navigate to **Daily** > **Distance Education** > **Lesson Receipt**. The Lesson Receipt Entry form is displayed.



3. The current date will be entered as a default in the **Date Received** text box. If this is not the date you want to use, click the arrow to select another date, or type your desired date in the box.
4. Enter the **Social Security Number** of the student from whom the lesson or exam has been received. CampusNexus Student finds the student's master record and displays the student's name. CampusNexus Student also displays the next **Class** (class section code) and **Lesson** code for which a lesson is expected to be received.
5. If the **Class** (class section code) is not the one for which a lesson has been received, select the correct one from the drop-down list. If you change the class section code, CampusNexus Student displays the next lesson expected in the class section you select.
6. If the **Lesson** is not the one that has been received, select the correct one from the list.

7. Click **Accept** to add the lesson to the list of those received.

   Note: If your school has set up a "minimum number of days between lessons", you may not be able to receive a lesson that has been sent in prematurely. If your school has set up a block on receiving lessons after the expected end date of the course, you may not be able to receive a lesson. A staff member with system administrator privileges can override these blocks.

8. Repeat steps 3 through 7 until all lessons received have been entered.
9. If you accepted a lesson that has not been received, remove it from the list by clicking on the lesson in the accepted list, and then click **Remove**.
10. Click **Save** at the bottom of the form to submit your list of received lessons.

    Note: If you discover that a mistake has been made after you have clicked Save, use the procedures under View > Academic Records > **Lessons** to correct the mistake.

11. Click **Close** to close the form.

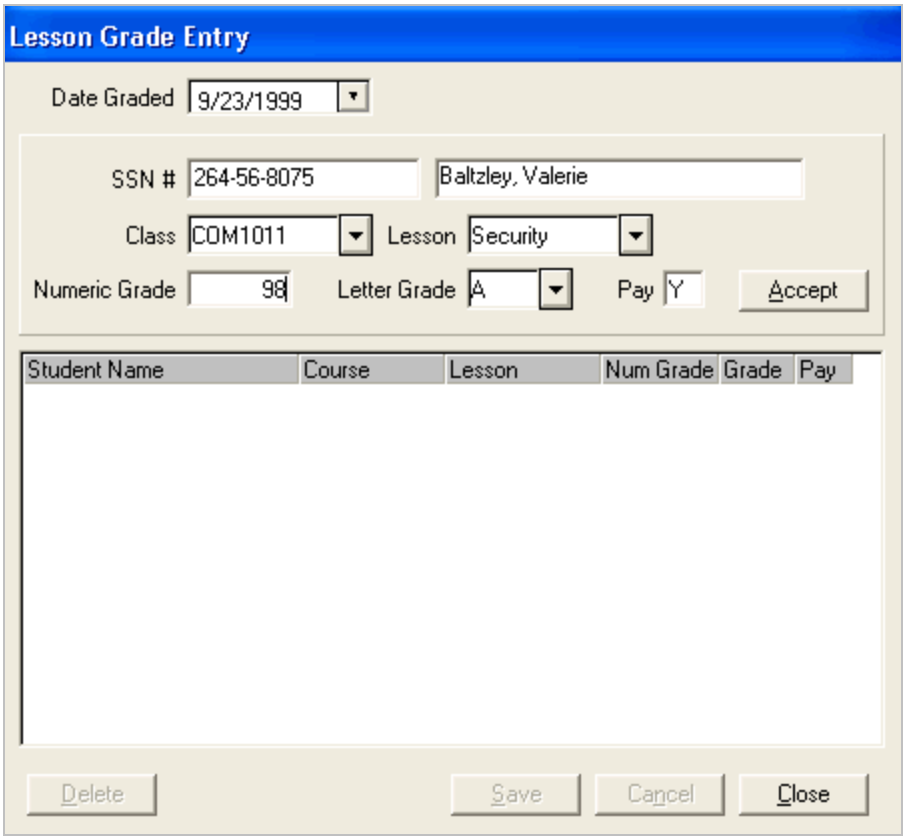
Lesson Grading

This is a "batch" processing procedure intended for situations in which you have several grades to enter for a number of students.

You can use this form to record the grades for lessons, exams, and book reports from your distance education students. (In the context of this procedure, lessons, exams, and book reports are handled in the same manner.) Of course, before you can use this form, a student must be registered in a class section for which lessons, exams, and/or book reports have been set up. Further, the lessons must have been received back at your institution from the student.

To record a lesson grade:

1. Determine the **Social Security Number** of the students for whom a grade must be entered.
2. Navigate to **Daily** > **Distance Education > Lesson Grading**. The Lesson Grade Entry form is displayed.
3. The current date will be entered as a default in the **Date Graded** text box. If this is not the date you want to use, click the arrow to select another date, or simply enter your desired date in the box.
4. Enter the **Social Security Number** of the student from whom the lesson or exam has been graded. The program will find the student's master record and display the student's name. The program will also display the next **Class** (class section code) and **Lesson** code for which a grade can be entered.
5. If the **Class** (class section code) is not the one for which you want to post a grade, select the correct one from the drop-down list. If you change the class section code, the program will display the next lesson for which a grade can be posted.
6. If the **Lesson** is not the one for which you want to post a grade, select the correct one from the drop-down list.
7. Enter the **Numeric Grade** and/or **Letter Grade**. If you enter a numeric grade, and if the grade scale has been set up for numeric grades, the program will calculate the proper letter grade. The reverse is not true, however. If you enter a letter grade, there is no way for the program to guess the numeric equivalent.
8. Enter a Y for yes or an N for no in the **Pay** text box. This indicates whether the instructor is to be paid for this grade. The default is Y.



9. Click **Accept** to add the grade to the pending list of lessons that have been graded.
10. Repeat steps 3 through 7 until all lesson grades have been entered.
11. If you graded a lesson in error, remove it from the list by clicking on the lesson in the accepted list, and then click **Delete**.
12. Click **Save** to submit your list of graded lessons.

    Note: If you discover that a mistake has been made after you have clicked Apply, you must use the procedures under View, Academic Records, Lessons to correct the mistake.
13. Click **Close** to close the form.

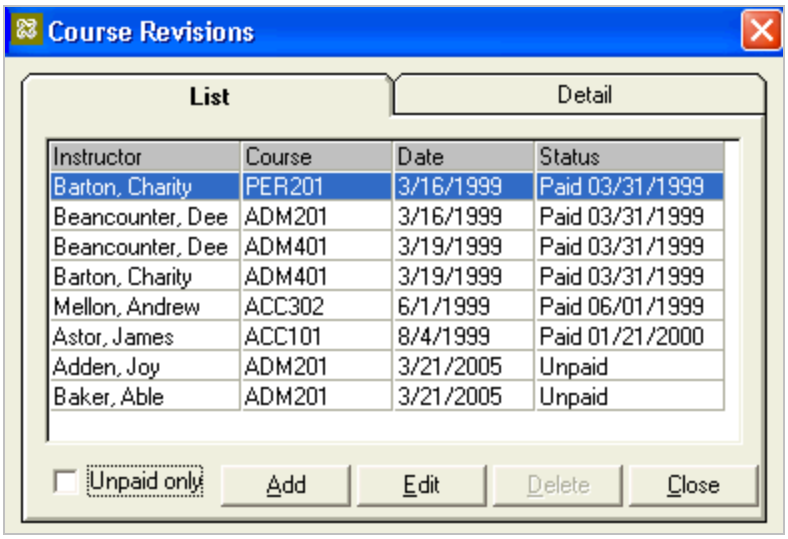
Course Rewrites

From time to time it becomes necessary to revise the lesson plan or content of a distance education course. This form can be used to initiate a payment to an instructor who has performed such a service. With it, you can record the instructor's name, course code, date, and amount. The program tracks the status of the payment.

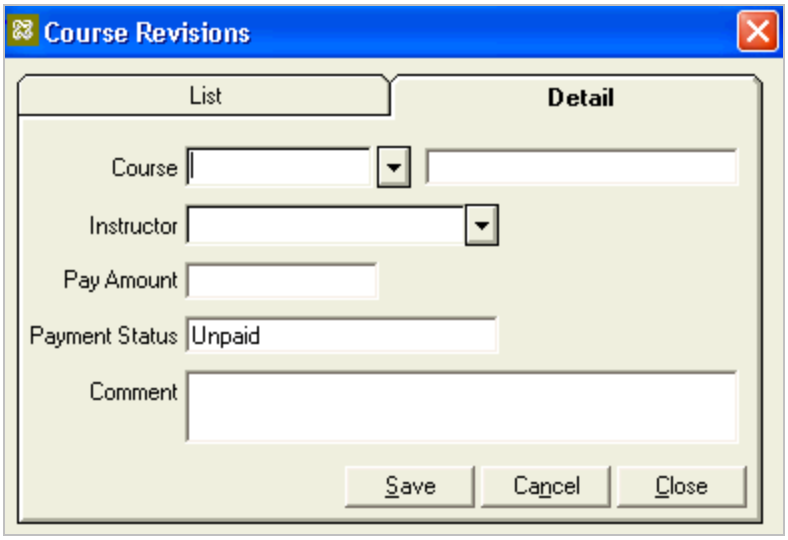
The result of entering a course revision record here is a payment transaction to the instructor during the next Instructor Payment Processing update.

To enter a Course Revision record:

1. Navigate to **Daily> Distance Education > Course Rewrites**. The Course Revisions form is displayed.



2. To see a list showing only those course revision records that have not been paid, click **Unpaid Only**.
3. Click **Add** to add a new course revision record. The Detail form is displayed.



4. Enter the **Course** code or select it from the drop-down list. When you tab to the next field, the description of the

course is displayed in the adjacent text box.

5. Select the **Instructor** from the drop-down list.
6. Enter the **Pay Amount**.
7. The **PaymentStatus** text box will default to unpaid. The program controls the Status values which are "Unpaid" or "Paid on 99/99/99" where 99/99/99 is the date of the Instructor Payment Processing procedure.
8. Enter any **Comments** that you want to add.
9. Click **Save** to save your new record and return to the List page.

To edit an existing course revision record:

1. Click the item on the list.
2. Click **Edit**.
3. Follow the steps above to change the data as needed.

To remove an item from the course revision list

1. Click the item on the list.
2. Click **Remove**. The item will be removed from the list. Only unpaid items can be removed from the list.

Instructor Payment Processing

In the Distance Education environment, instructors are paid on the basis of lessons, exams, and book reports graded. A schedule of pay rates is set up for each program or course. Your institution's instructor payment policy is established and maintained under the Setup menu in the Distance Education option.

You can also pay the instructors for work they have done in the rewriting (revision) of course content. You enter amounts for this type of work on a case-by-case basis. See the topic Course Rewrites for more about entering the payment details.

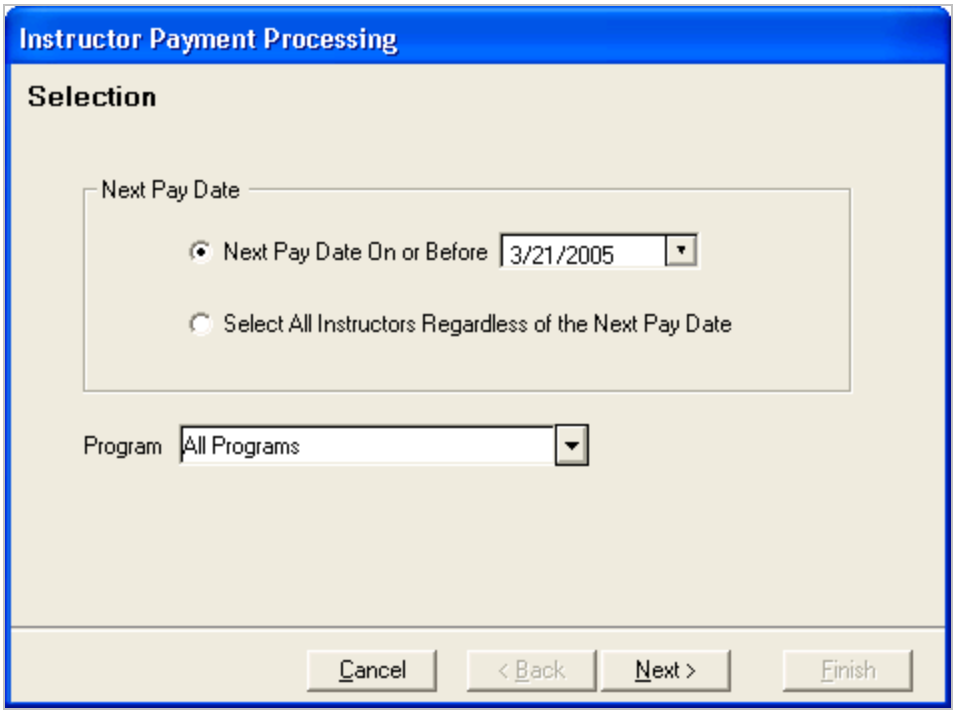
In this procedure, you can trigger the payment of DE instructors based on the work that has been done up to the instructors next pay date. You can also elect to pay all instructors regardless of their next pay date.

You can cancel the procedure at any time before you actually commit the update at the end. You will be asked to confirm your intention to update before anything permanent happens. Thus you can go through the process to the point where you can run the reports, run them and check them, then decide whether to actually do the update.

Process Instructor Payments

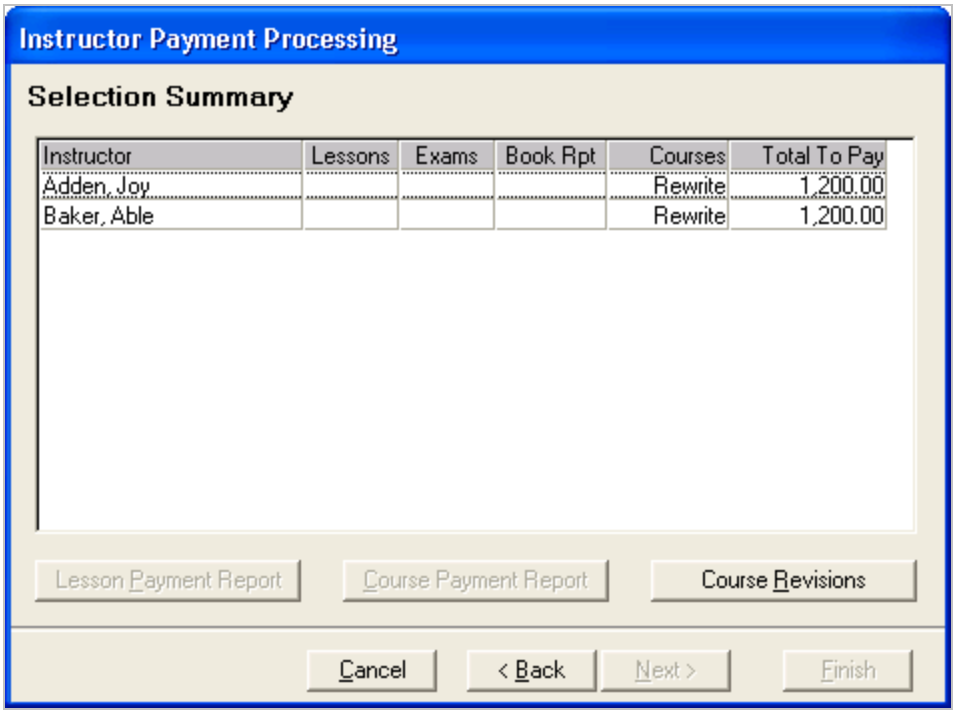
To perform the Instructor Payment Processing procedure:

1. Navigate to **Daily** > **Distance Education** > **Instructor Payment Processing**.



2. Select **Next Pay Date On or Before** or **Select All Instructors . . .**.
3. If necessary, change the date in **Next Pay Date On or Before**.
4. Select the appropriate **Program** or All Programs.
5. Click **Next**. The next page of the wizard is displayed.

   Note: It may take a few seconds for the grid to load in the text box on this form. Don't do anything until the grid appears in the text box.



6. On the second form, a summary of instructors due to be paid is displayed.
7. The available **payment reports** must be run before you can finish the procedure. The Finish command will be "dimmed" until all reports have been run.
    - If you have instructors that are being paid by the lesson, click Lesson Payment Report to display and print a detailed report of instructor payment activity for lessons, exams, and book reports.
    - If you have instructors that are being paid by the course, click Course Payment Report to display and print a detailed report of instructor payment activity for courses.
    - If there are any Course Rewrites that have been posted, you can print a report that lists them. If any are pending, payments for course rewrites are processed on every run.
8. After you have printed the necessary reports, the Finish button is activated. If the report(s) are satisfactory, click **Finish**.
9. CampusNexus Student prompts you to confirm if it is okay to complete the payment process and update.
    - Click **Yes** to complete the process. The lesson and course records will be updated to indicate that the instructor has been paid.
    - Click **No** to stop the update procedure.
    - Click **Cancel** to exit from the procedure. You can then make necessary adjustments and re-start the Instructor Payment Process.

Lesson Payment Report

The Lesson Payment Report lists **payments to be paid** to instructors, by course by instructor. Payment data is for distance education activity including grading of lessons and exams that has been done by the instructors but not yet paid for. The actual title of the report is "Instructor Payment Report Per Lesson". It is printed during the periodic processing of payments to instructors. If activity exists on this report, payment cannot be completed until this report is printed. Payments depend on DE setup for payment schedules per course, lesson, exam, and bonuses for prompt responses. Payments for course revisions are recorded on a case by case basis. Instructor payment schedules are established on an individual basis in DE system setup.

Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

Historical lesson payments (payments that have already been paid) are not listed on this report.

Selection Criteria

- Instructor
- Program

Sort Variables

- None (The report is automatically sorted by lesson within student within class section within instructor.)

Date Ranges

- Pay Date
- Instructor Next Pay Date
- Instructor Last Pay Date (Most Recent Pay Date)

Comparison Variables

- None

Additional Header Information

- Instructor Name

Detail Line Columns

- Course (Class Section)
- Course Description
- Student Name
- Student Social Security Number
- Date Graded
- Lesson/Exam Description
- Type (of Lesson; that is, lesson, exam, or book report)
- Lesson Grade
- Amount Paid
- Days (number of days between receipt of lesson and grade recorded)

Course Payment Report

The Course Payment Report lists payments to be paid to instructors, by student within class section within instructor. Payment data is for distance education activity including courses that have been graded by the instructors but not yet paid for. The actual title of the report is "Instructor Payment Report Per Course". It is printed during the periodic processing of payments to instructors. If activity exists on this report, payment cannot be completed until this report is printed. Payments depend on DE setup for payment schedules per course.

Historical course payments (payments that have already been paid) are not listed on this report.

Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

Selection Criteria

- Instructor
- Program

Sort Variables

- None (The report is automatically sorted by student within class section within instructor.)

Date Ranges

- Pay Date
- Instructor Next Pay Date
- Instructor Last Pay Date (Most Recent Pay Date)

Comparison Variables

- None

Additional Header Information

- Instructor Name

Detail Line Columns

- Course (Class Section)
- Course Description
- Student Name
- Student Social Security Number
- Date Complete
- Lesson/Exam Description
- Type (always Course)
- Final Grade
- Amount Paid

Course Revisions Report

The Course Revisions Report lists **payments to be paid** to instructors for course content revisions. Payment data is for distance education activity. The actual title of the report is "Instructor Course Revisions. It is printed during the periodic processing of payments to instructors. If activity exists on this report, payment cannot be completed until this report is printed. Payments for course revisions are recorded on a case by case basis.

Historical payments (payments that have already been paid) are not listed on this report.

Selection Criteria

- None

Sort Variables

- Staff Name (Instructor)
- Date Added

Date Ranges

- None

Comparison Variables

- None

Additional Header Information

- None

Detail Line Columns

- Name (Instructor)
- Course (Code)
- Amount Paid
- Comments (from payment record)

Daily > Career Services

The Daily > Career Services submenu options are as follows:

- Document Tracking
- Employers
- Print Employer Letters
- Update Placement Status/Advisors
- Reassign Employers
- Process Online Employers
- <Detach> (This options detaches the submenu.)

Document Tracking

Institutions request documents from students and persons or organizations connected with the student. Use Document Tracking to keep track of the documents that are necessary for processing student records in an orderly fashion.

Document Tracking is available in the following modules:

- Admissions - AM
- Financial Aid - FA
- Student Accounts - SA
- Academic Records - AD
- Loan Management - LM
- Career Services - PL

You can use the Daily > Document Tracking feature to look at all documents of a certain type to determine the document's status for each student.

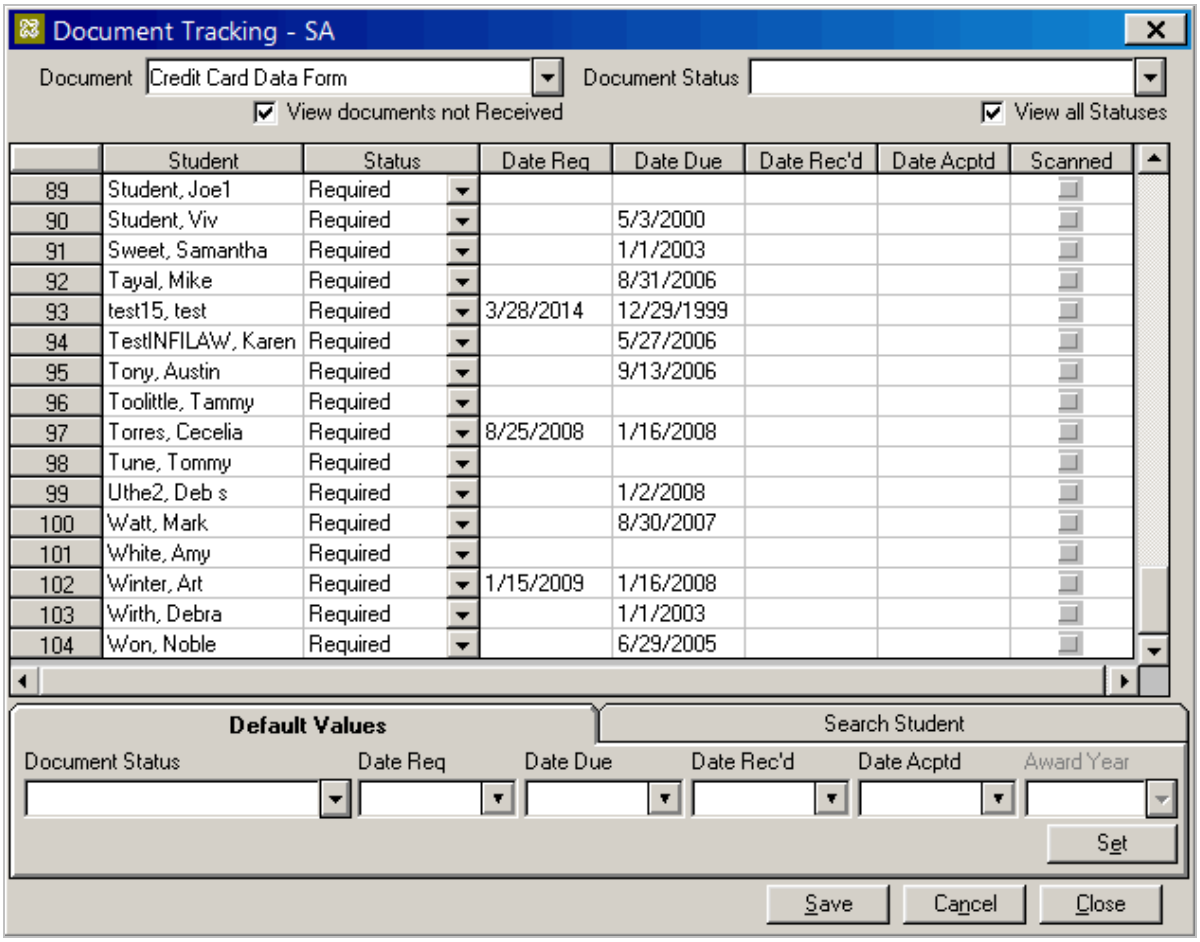
Several documents relate to academic or demographic history and your organization must have copies of them for each student. Examples are birth certificates, driver's licenses, transcripts, alien registration cards, social security cards, etc. Management policy determines which documents are important at your institution.

You can set up lists of these documents and assign them to each student record. You can then record the current status of the documents, the date you requested each document, and the date you received each document. You can also indicate that the document has been scanned into your electronic filing system.

Note: This approach differs from the Document Tracking option that you can access from the View > Contact Manager menu or Student Bar. When you access Document Tracking from the Student Bar, all documents related to a specific student as displayed. Here, you see all students related to a given document.

To edit tracking data for listed documents:

1. Navigate to **Daily > Admissions** (or other module) **> Document Tracking**. The Document Tracking form is displayed.



2. Select a **Document** from the list box at the top of the form. All students having the selected document related to their files are listed on the form.
3. Select or clear **View Documents Not Received**.
   - If the check box is selected, only those documents that have not been received are listed.
   - If the check box is cleared (default), all documents (subject to your Document Status selection) are listed.
4. For Document Tracking in Financial Aid - FA, select an **Award Year** to which the documents apply.

   Note: If you choose a Financial Aid document that does not have the "Award Year Specific" flag selected (indicating Yes) on the Document Setup, the form is displayed with the three Award Year fields disabled.
5. Select or clear **View All Statuses**.
6. Select an optional **Document Status**. If you select a document status, CampusNexus Student lists only the type of document you selected and only those that have the selected status.
7. From the displayed list, find a student document.
8. Click on a field in the row you want to update. You can update the following fields:
   - Status
   - Date Requested
   - Date Received
   - Date Due

- Date Accepted
- Scanned

Note: In date fields, you must enter the century along with the year. For example, 06/30/2000. If you just enter 99 instead of 1999, CampusNexus Student will reject it.

9. Click **Scanned**, if necessary, to indicate that you have scanned the requested document into your electronic filing system.
10. The **Default Values tab** enables you to update statuses and dates in batches.

    If you select a Status, or a Date Due, or Award year, for example, CampusNexus Student updates the values of all students whose names appear in the grid. Click **Set** to update the values and save your work.
11. The **Search Student tab** enables you to search a student using the Social Security Number (SSN) or Student ID.

    Type the SSN or ID and click **Filter**. CampusNexus Student finds the student associated with that number and displays only that student's name and information in the grid. Click **Clear Filter** to remove the filter. The grid revert to the previous display of students.
12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Employers

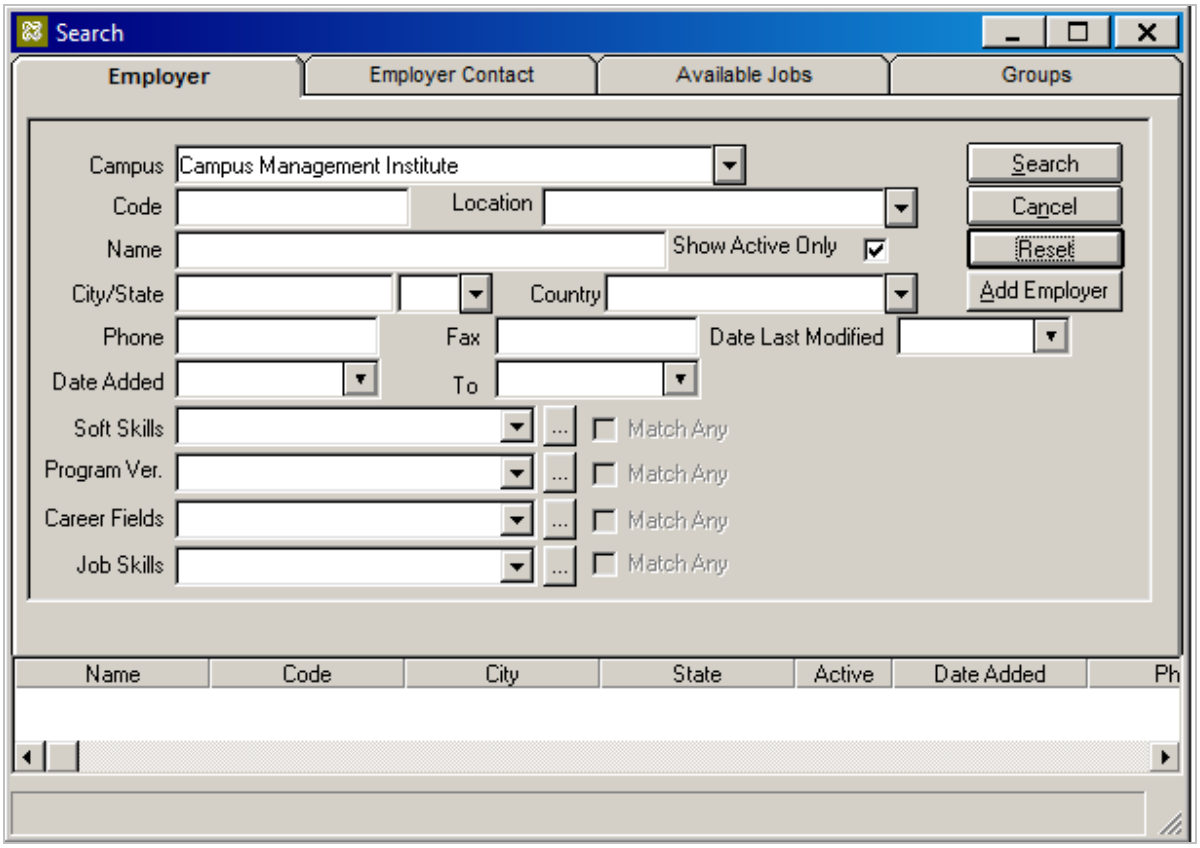
Employer records are maintained under the Daily Career Services menu. All information about employers with whom your school has a Career Services relationship is kept here. Note that while each record in this list represents one employer address, the employer may have multiple entries for contacts, available jobs, and entries in placement history. The employer may also be related to a corporate entity with many other employer entities.

- Employer Search
- Employer Contact Search
- Available Jobs Search
- Address
- Contacts
- Available Jobs
- Placement History
- Comments
- Activities
- Employer Groups

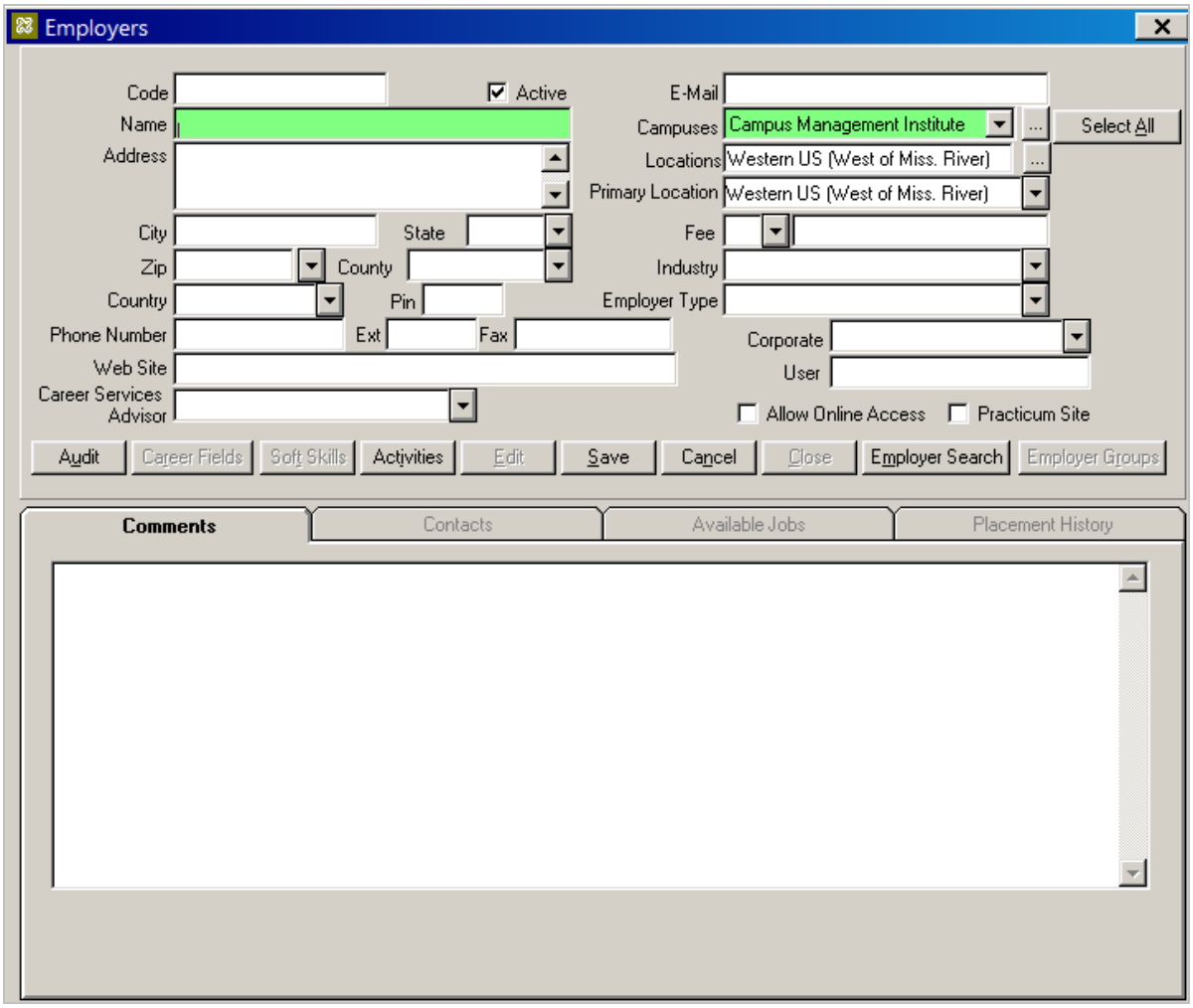
Employer Search

To find an employer:

1. Navigate to **Daily > Career Services > Employers**. The Search form for Employers, Employer Contacts, and Available Jobs is displayed.



2. Click **Add Employer**. The Employers form is displayed.



Enter information on the form. Note that this form requires only two fields: 'Name' and 'Campuses'. You can select one campus or all campuses for this employer.

Note: To prevent entering the same employer multiple times, enable the **Enable Duplicate Employer Check** under **Setup > Career Services > Settings**. If the Enable Duplicate Employer Check setting is set to **Global** or **CampusBased** and you attempt to enter an employer with the same name, address, phone, or website as an existing employer, a form will appear that will list any employers that match the new entry. CampusNexus Student allows you to enter a duplicate employer or duplicate information, if, for example, two different employers happen to share the same address. You can then check the Possible Duplicate Employer form to see if the new entry is a duplicate, or close the form to continue to enter the new employer.

Users who have the **Override** button on the Possible Duplicate Employer form enabled (under **Setup > Staff > User Info** tab **> Career Services** sub-tab) are allowed to save duplicate data as an existing employer. Users who do not have the Override button enabled must change the data so that it does not match to save the new employer. If the entry is a duplicate of an employer already entered, double-click the matching entry on the Possible Duplicate Employer form to select the previously entered employer information. The selected employer's information is displayed on the Employers form.

Note: If the **Allow User to Associate Employer with Campuses outside of the assigned Campus Group** setting under **Setup > Staff > Staff Member tab >*Add*button > User Info tab >** Career Services **tab** is *enabled* for the staff member, then all active campus locations will be available for selection and associated with the employer.

If the flag is disabled then the staff member will only be able to associate the Employer with campuses within their Campus Group. See also Career Services Settings to give security rights to staff members within staff groups.

You cannot add any information in the Contacts, Available Jobs, or Placement History fields until you click Save on this form. Once the information has been saved, click the Contacts, Available Jobs, and Placement History tabs to enter information about contacts, available jobs and placement history.

The **Code** field at the top of the form allows you to group employers by job type. Career Services can create a series of codes (for example, 'COMP' for computer related jobs or 'BANK' for banking jobs). Once this list has been created, enter the appropriate code for the employer in the 'Code' field. This will allow Career Services staff to search for all employers listed under that code. Alternatively, Career Services can use a numerical system, or designate a unique numerical code for each employer, depending upon the department's needs.

When adding or editing an Employer record, the Career Services Administrator can select multiple locations. When the 'Locations' is selected, a grid is displayed (populated with only those locations that belong to the selected campuses) to associate more than one location with the employer and allows you to select a primary location. The 'Active' check box in the grid is enabled by default and used to set the Employer-Location association. Clear the 'Active' check box to disable the Employer-Location association. When you have completed your selections, click and the grid is no longer displayed; however, the locations selected will appear in the Locations field, separated by a semicolon.

Note: If you modify locations or edit the 'Active' column in the grid, an audit is maintained with the old and new values.

The **Primary Location** field is populated with only those locations that are selected in the Locations field and are marked 'Active' in the grid. An audit is also maintained for any changes made to this field, displaying the old and new values.

If the employer is offering jobs as part of a college or graduate practicum program or course, click the **Practicum Site** box.

If you have any additional comments about this employer, enter them in the **Comments** tab at the bottom of the form.

Once all information about this employer has been entered, click the **Save** button in the center of the form.

3. To find an existing employer, on the **Employer** tab, enter search criteria such as a **Campus**, **Code**, **Description**, **Name**, **Phone**, or **Fax** number. You can enter part of a field value to get all records that match the partial entry. For instance, enter "m" to get all the employers whose code started with the letter "m". The search is not case-sensitive.
4. Click **Search**. CampusNexus Student lists all records that match your search criteria in the grid.

   When adding an activity from the Employer form, you will see the selected employer as the default in the Employer field after clicking the **Employer Search** button on the activity form.

Employers Form

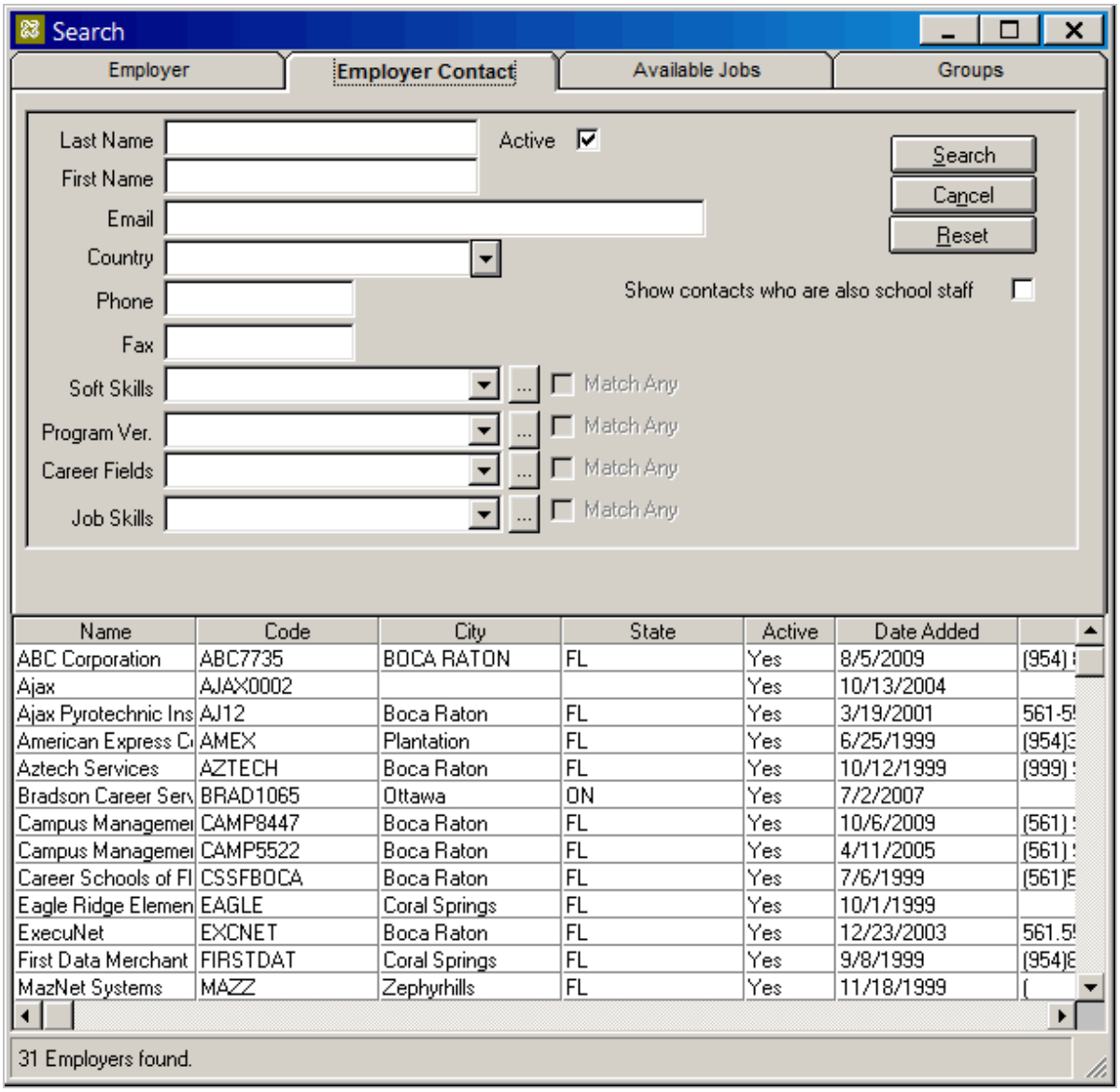
5. Double-click a row in the search results grid to open the **Employers** form for that particular employer, or click the **Employer Search** button to return to the Employer Search form.

See Address for more on working with employer data.

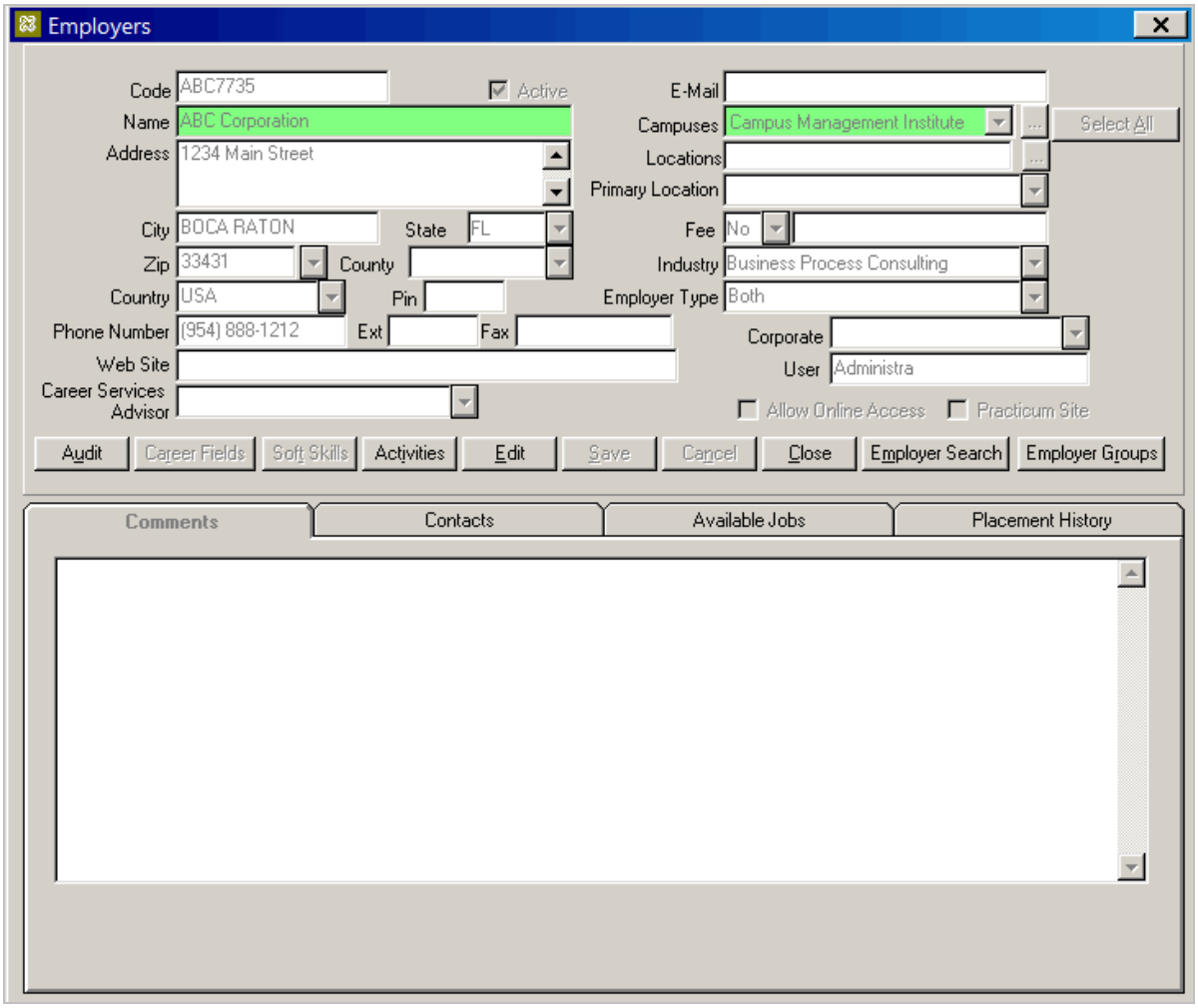
Employer Contact Search

To find an Employer Contact:

1. Click the arrow on **Search** tool and select **Search Employer**.
2. When the Employer Search form is displayed, click the **Employer Contact** tab.



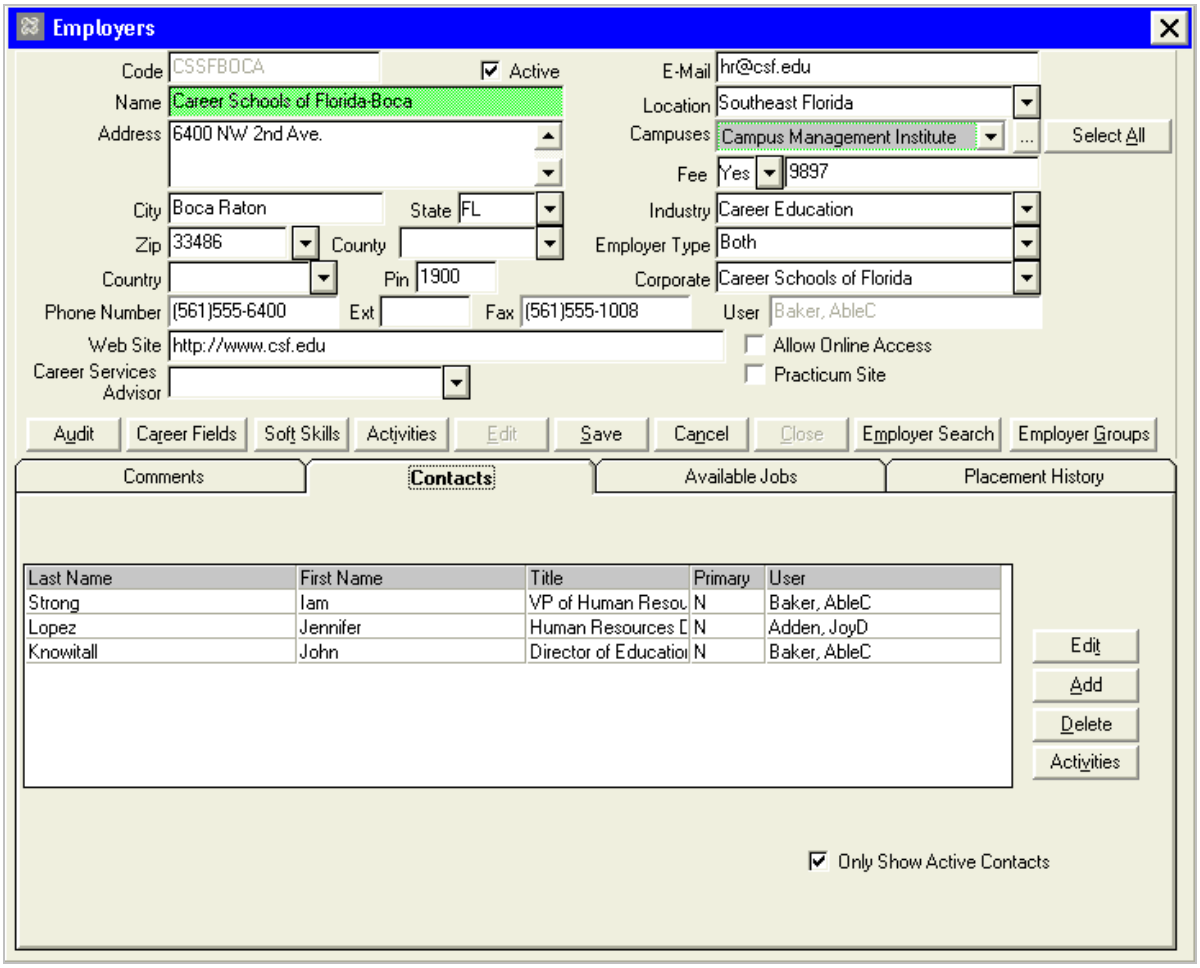
3. Enter your search criteria. Employer Contact search criteria include Last Name, First Name, Email, Country, Phone, Fax, Soft Skills, Program Version, Career Fields, and Job Skills. You can enter partial data in a search field.
4. Click **Search**. CampusNexus Student displays all employer contacts that match your search criteria.
5. **Double-click** the contact row for which you want to see the details. CampusNexus Student opens the Employer Master record to which the selected contact is related.



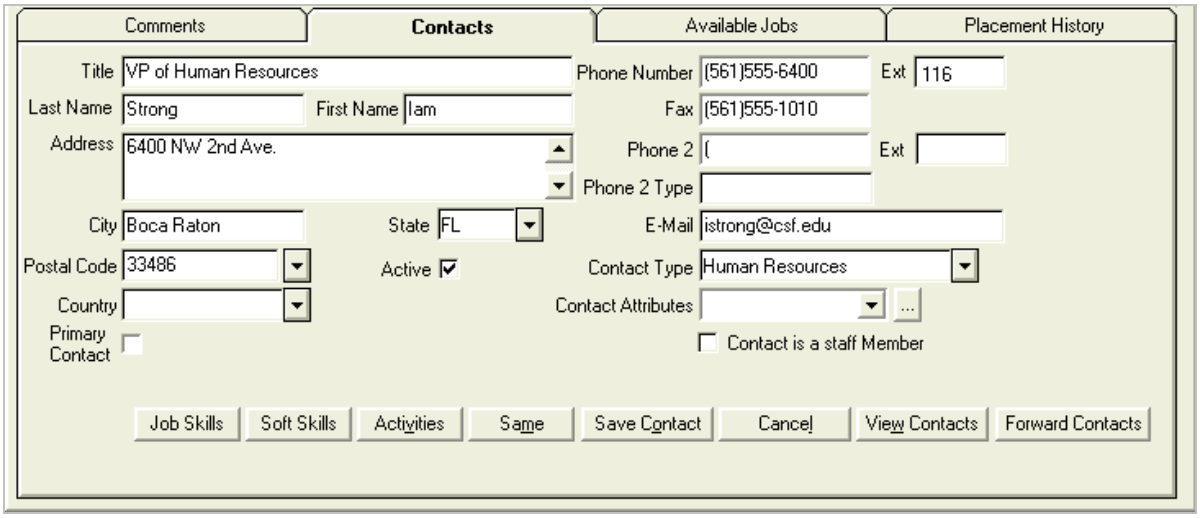
6. Click **Edit** to open the employer record for editing. This is necessary to view the employer's contact list.

   Note: If the **Allow User to Associate Employer with Campuses outside of the assigned Campus Group** setting under **Setup > Staff > Staff Member tab > Select Staff Member >*Edit*button > User Info tab > Career Services tab** is *enabled* for a Career Services Advisor, users may edit existing Employers and associate the employers to any active campus location. See also Career Services Settings to give permission to staff members within staff groups.

7. Select a contact on the list and click **Edit** to view the **Contact**'s detailed information. The program will change the form as shown below.

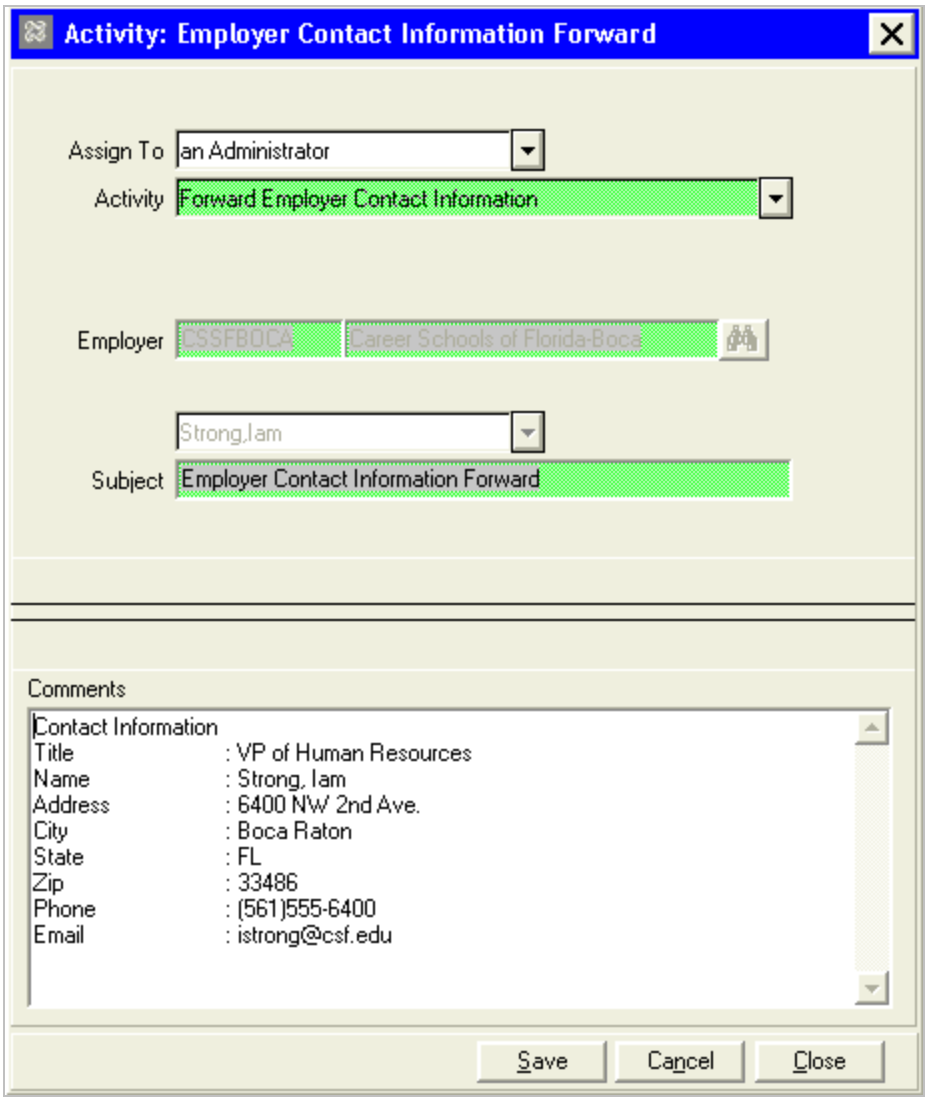


8. View or edit the contact data as required by double-clicking a contact.



9. Click **Job Skills** to obtain a list of job skills.
10. Click **Soft Skills** to obtain a list of soft skills.
11. Click **Activities** to obtain a list of Activities.

12. Click **Same** to load the contact address with data from the Employer address.
13. Click **Save Contact** to save any changes you make.
14. Click **Cancel** to stop the changes.
15. Click **View Contacts** to return to the employer's contact list.
16. Click **Forward Contacts** to the contact information.



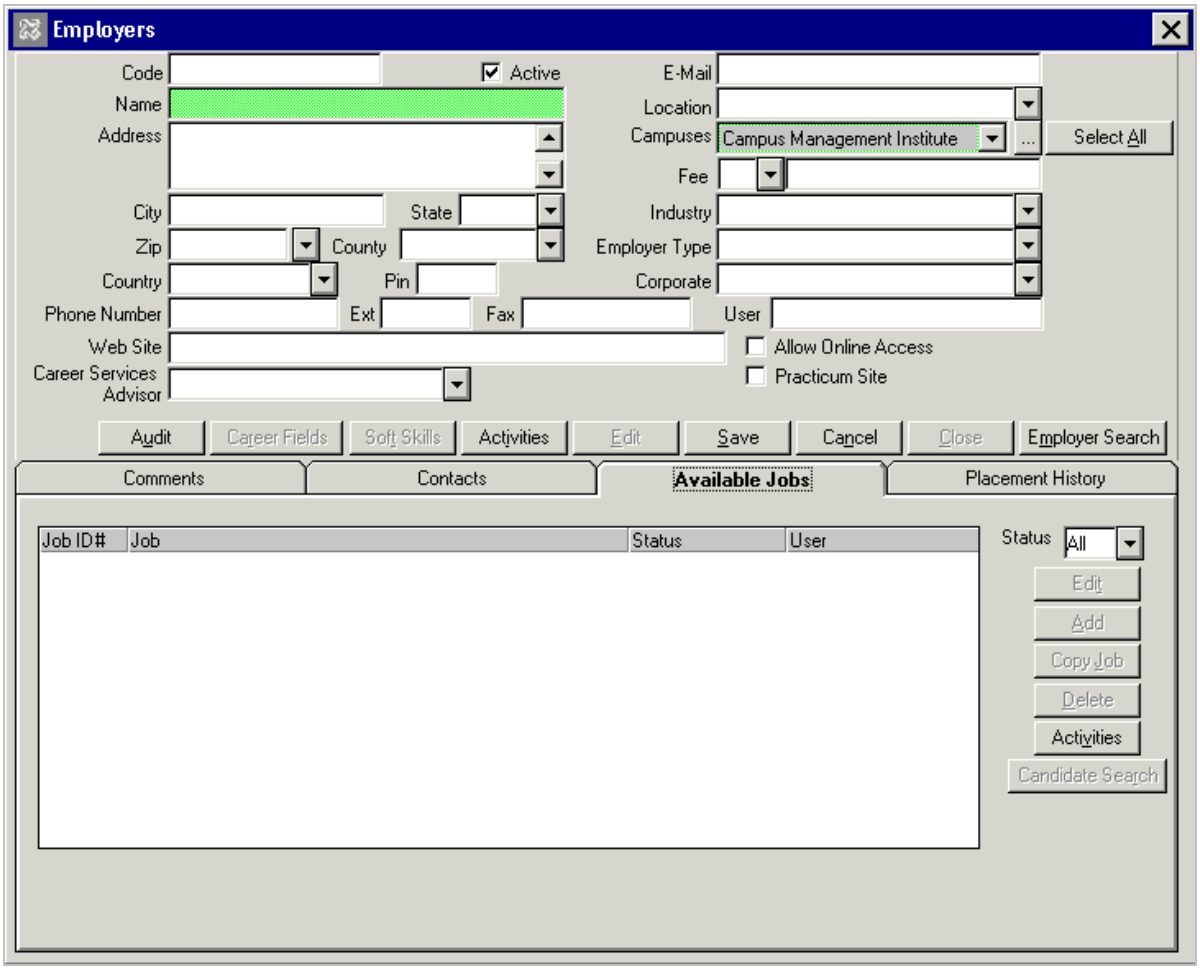
17. Click **Close** to close the form.

See Contacts for more information about employer contacts.

Available Jobs Search

To find available jobs:

1. Click the arrow on **Search** tool and select **Search Employer**.
2. When CampusNexus Student displays the Employer **Search** form, click **Available Jobs**.



3. Enter your search criteria. You may **search for a specific employer** by clicking the binoculars icon. Available Jobs search criteria include Campus, Employer, Description, Area Code, State, Job Type, Job Title, Job ID, Soft Skills, Program Version, Career Fields, Job Skills, Job Status, and Available Jobs Dates. It is permissible to enter partial data in a search field.

   Note: All search criteria are ANDed together unless you enable the **Match Any** check box next to a field. Then that field is ORed with the other fields. For example, if you selected Spanish for the **Job Skills** field, and selected Business Administration as the **Program Version**, the search would return all available jobs for Business Administration program versions that listed Spanish as a soft skill. However, if you also enabled the **Match Any** check box for the **Program Version** field, the search would return all available jobs for Business Administration, whether they required Spanish or not.

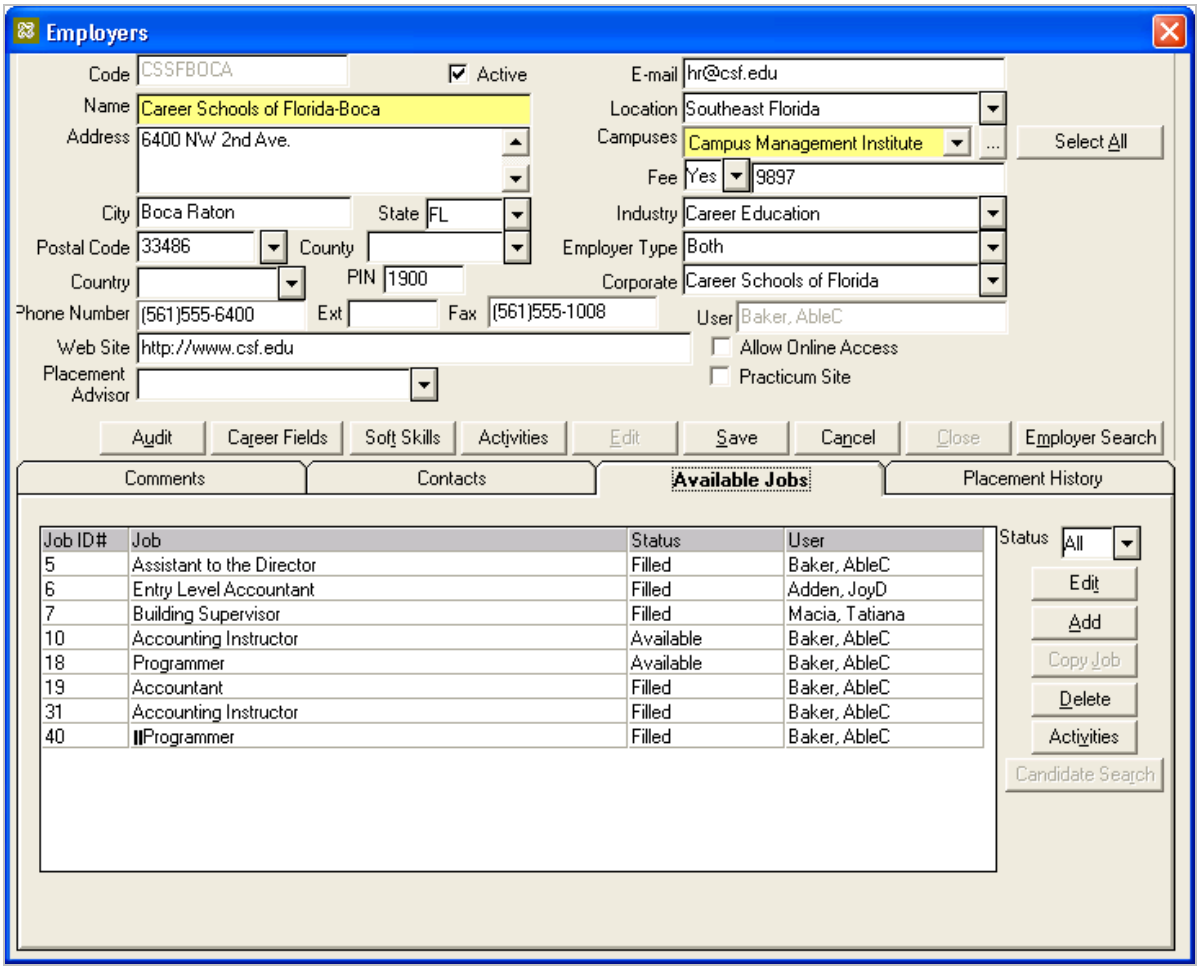
   In addition, to include jobs that have no openings in the search results, the user can enable the **Include Jobs with no openings**check box. The search results will include the jobs that have no (i.e., zero) openings. If the **Include Jobs with no openings** check box is disabled, the search results return only those jobs, which have at least one opening.

4. Click **Search**. CampusNexus Student displays all available jobs that match your search criteria.

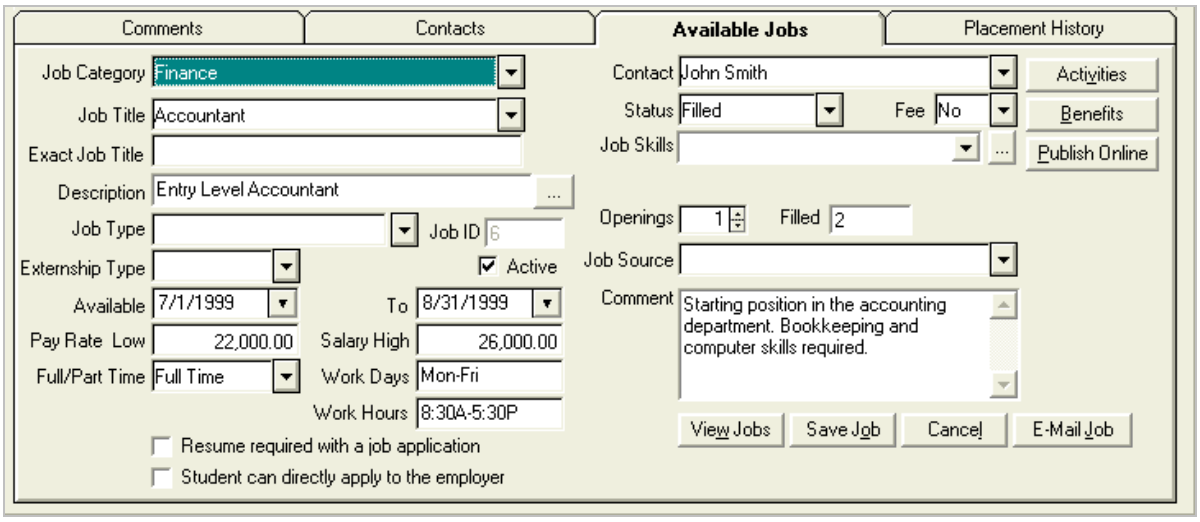
5. **Double-click** the job row for which you want to see the details. The Employer Master record to which the selected job is related is displayed.

6. Click **Edit** to open the employer record for editing. This is necessary to view the employer's job list.

7. Click **Available Jobs**to view a list of all available jobs matching the search criteria.



8. Select a job on the list and click **Edit** to view the job's detailed information.



9. Modify the job information available within Available Jobs tab as necessary.
10. Click **View Jobs** to return to the employer's list of available jobs.

11. Click **Save Job** to save any changes you make.
12. Click **Cancel** to stop the changes.
13. Click **Email Job** to send the job information to an email recipient.
14. Click **Close** to close the form.

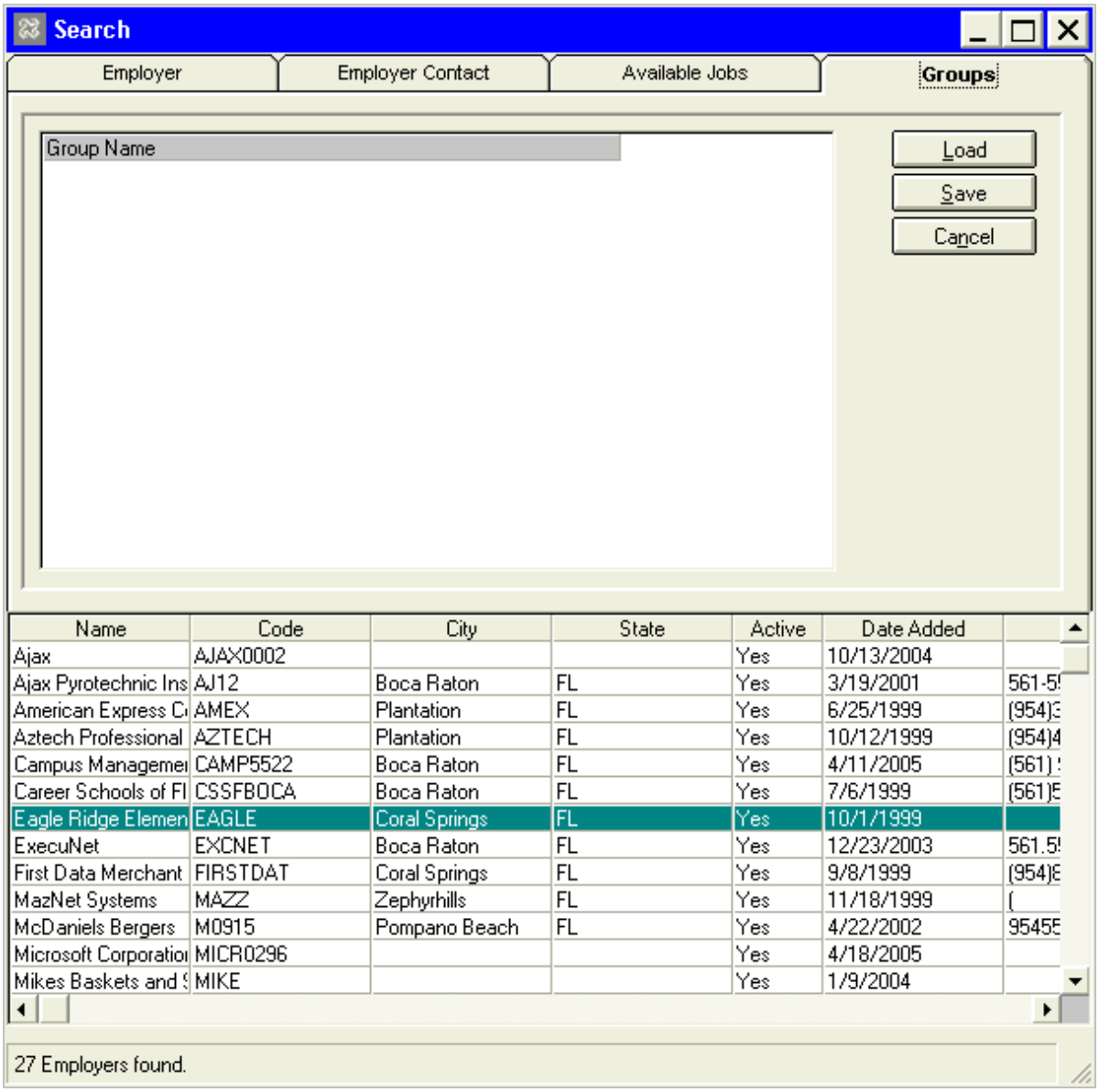
See Available Jobs for more information about available jobs.

Employer Groups

Employers can be assigned to Groups just as Students can be assigned to Groups.

1. Click **Load** to display the Employer Groups.
2. Click **Save** to associate the selected Employer with an Employer Group.

3. Click **Cancel** to cancel your Employer Group selection.



Placement History Tab

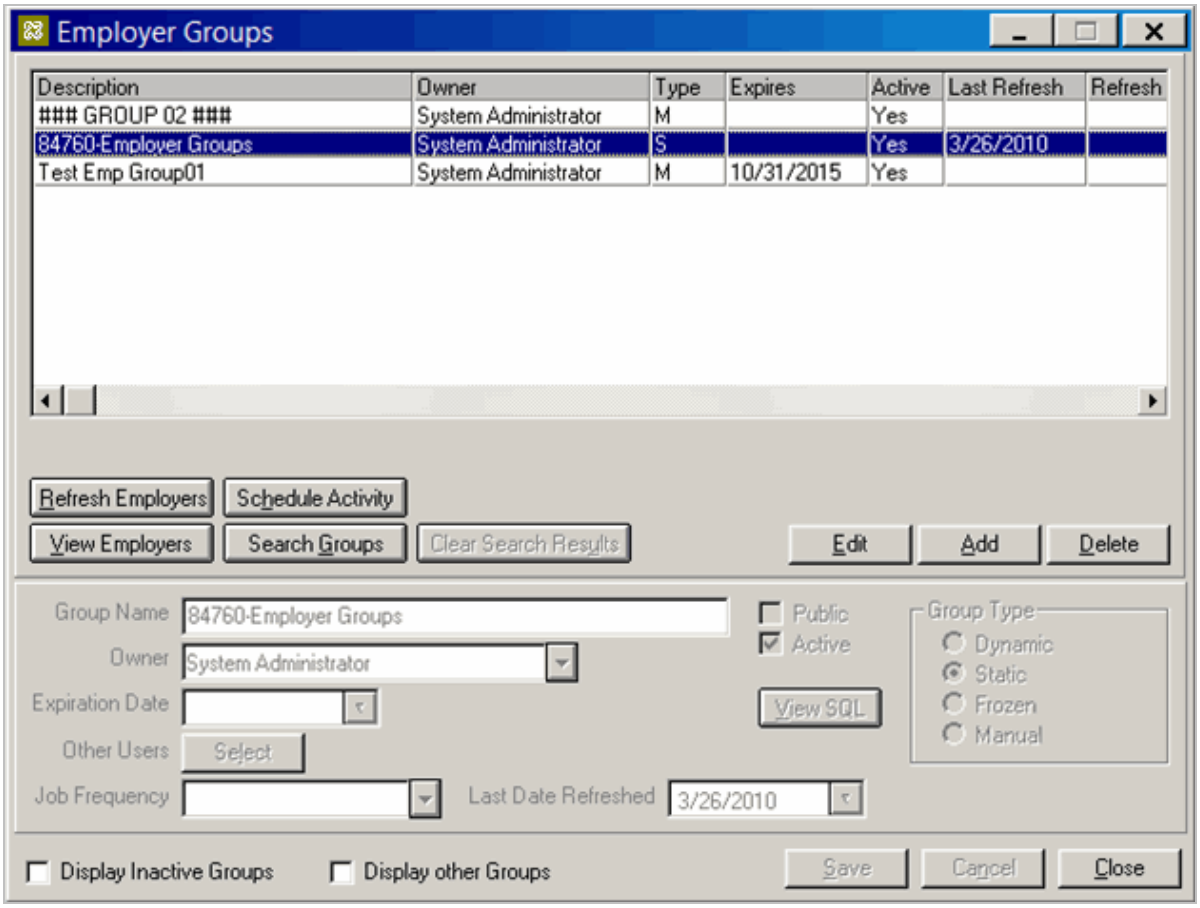
See Placement History.

Employer Groups

Groups serve to organize a list of employers who have one or more characteristics in common. They may all be related to a particular field of study, offer only part-time or intern/extern jobs, or just about anything else you can think of.

When you select an employer from the Employer Group list, the View Employers, Schedule Activity, and Search Groups buttons become available to use.

Select the **Display Inactive Groups** check box if you only want to see a list of Inactive Groups or select the **Display other Groups** to only see a list of other Groups.



An employer group can be created in the following ways:

- Through lists of employers on a report
- Through a search of employers
- By manually adding a new group and selecting employers to be members of it

The process of creating an employer group via a report is described in "Employer Report Preview". See also Employer Search for creating an Employer Group via the Employer Search process.

Creating a Employer Group from a Report

Only authorized users may create an Employer Group from a Report. Authorization may be established by setting the Allow Dynamic Groups option to "Yes" for the staff member. See System settings for additional information.

The process of manually creating an Employer Group is described later in this topic.

Only authorized users may view/edit/add/delete/ or print Employer Groups. See System settings to set up these permissions.

You can view the list of employers who are members of a group, add employers to a group, and remove employers from a group. You can schedule activities for the members of the group as a whole. (To schedule an activity for an individual member of the group, you must do so through the Daily > Career Services > Employers > Activities button path.)

A group is "owned" by the user who creates it. Ownership can be transferred from one owner to another. Once ownership of a private group is transferred, the previous owner no longer has the right to see the group.

A group can be Public or Private. A public group can be viewed and edited by persons other than the one who created the group. A Private group can be viewed and edited only by the person who created it, or those authorized to do so by the group's creator. A group that is formed by saving a search or running a report is typically designated as Private (not Public) until the owner intentionally sets it to be Public. A manually created group defaults to Public. The person creating the group must clear the Public option if necessary to keep it private.

A group can be active or inactive as required by the owner.

Adding and Deleting Group Members

If the group is a manual group type and it is "Public", any user with appropriate access rights can add and delete employers. Only the owner of a Private group or the system administrator can perform maintenance, such as adding and removing employers.

The owner of a Private group or the system administrator can add or delete staff members who have access to that group. When the Public check box is disabled, the Other User **Select** button becomes available. Clicking **Select** displays the **Student Group Staff** form.

Note: Additional users can only add/remove employers from the group from the employer's **View** menu, not from their **Manage Student Groups** form.

The authorized user can search for staff members and add them to the list of Selected Staff for the group. The **Search** button becomes available when the user enters data in any of the search criteria fields or selects a Staff Group from the drop-down list.

Check the **Display Inactive Groups** box at the bottom of the form to view inactive groups. The default view lists only employer groups that are active.

Check the **Display other Groups** box at the bottom of the form to view public groups not owned by the logged in user. The default view lists all employer groups that the logged in user owns or has been given permission to edit.

Group Types

Group types can be **dynamic**, **static**, **frozen**, or **manual**. Dynamic, static, and frozen groups are typically formed by saving the results of a search or a report. These group types can be changed from one type to another, including manual. The manual type, however, cannot be changed to any of the other types since there are no automatic parameters involved.

Dynamic Group

The list of employers in a dynamic group changes when an employer qualifies for the group by virtue of a change in the variable upon which the group was selected. For example, if a group is made up of employers in the General Management Program Version 2, any employer who is enrolled in that version of the program is automatically a member of the group. A employer who leaves the program is automatically removed from the group. A dynamic group can be changed to a manual group, but once you save it as a manual type, it cannot be changed back to dynamic.

An "Allow Dynamic Groups" option is available in the System setup parameters. If you select No for this option, the program will make the dynamic employer group type unavailable when creating new groups.

On the Student Groups maintenance form, if the Allow Dynamic Groups option is **No**, the program does not allow the group type to be changed to dynamic. It will display a message, "*Dynamic Groups have been disabled by the System Administrator*". If you select **Yes**, the program will function as described above.

Static Group

A static group is one that once created can be "refreshed" from time to time by clicking **Refresh**. A static group can be changed to a Manual group, but once you save it as a Manual type, it cannot be changed back to Static.

Frozen Group

A frozen group is one that once created cannot be updated. This type of group can be used when you want to compile a list of employers that will never change. The employers meet a certain criteria on a given date and the members of the group must be retained indefinitely. For instance, you might want a list of employers who started on a given date. No one else can qualify for the group except the employers who actually started on the given date and you want to track them for some time into the future.

Note the distinction between "frozen" and "not active". A frozen group is still available for use in the purpose for which it was created. A group that is "not active" is no longer available for use.

Manual Group

A manual group is created and maintained by the user. The user can include or remove employers from the list at will. You as the user might create an initial list for the group by running a report and then add or remove employers from the group as required.

Group Type Change Warning

If you attempt to add or delete an employer in a dynamic, static, or frozen group, a verification message is displayed indicating that removing the employer from this group will convert the group type to manual. Click Yes to continue, No to stop the process.

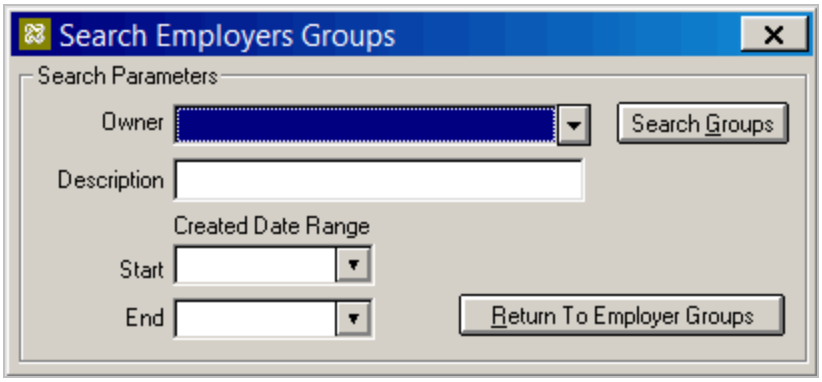
If you answer **Yes** to this message, the group is converted to a Manual group type. It no longer behaves as an automatically controlled group type.

View Employers

Click View Employers to add an existing Employer to a Group. The Employer Group form will appear.

Search Groups

Search for Employer Groups by clicking on Search Groups. The Search Employer Groups form is displayed. Enter your search criteria and click on **Search Groups**. You are returned to the Employer Groups form and a list of Employer Groups meeting the search criteria that you entered is displayed.

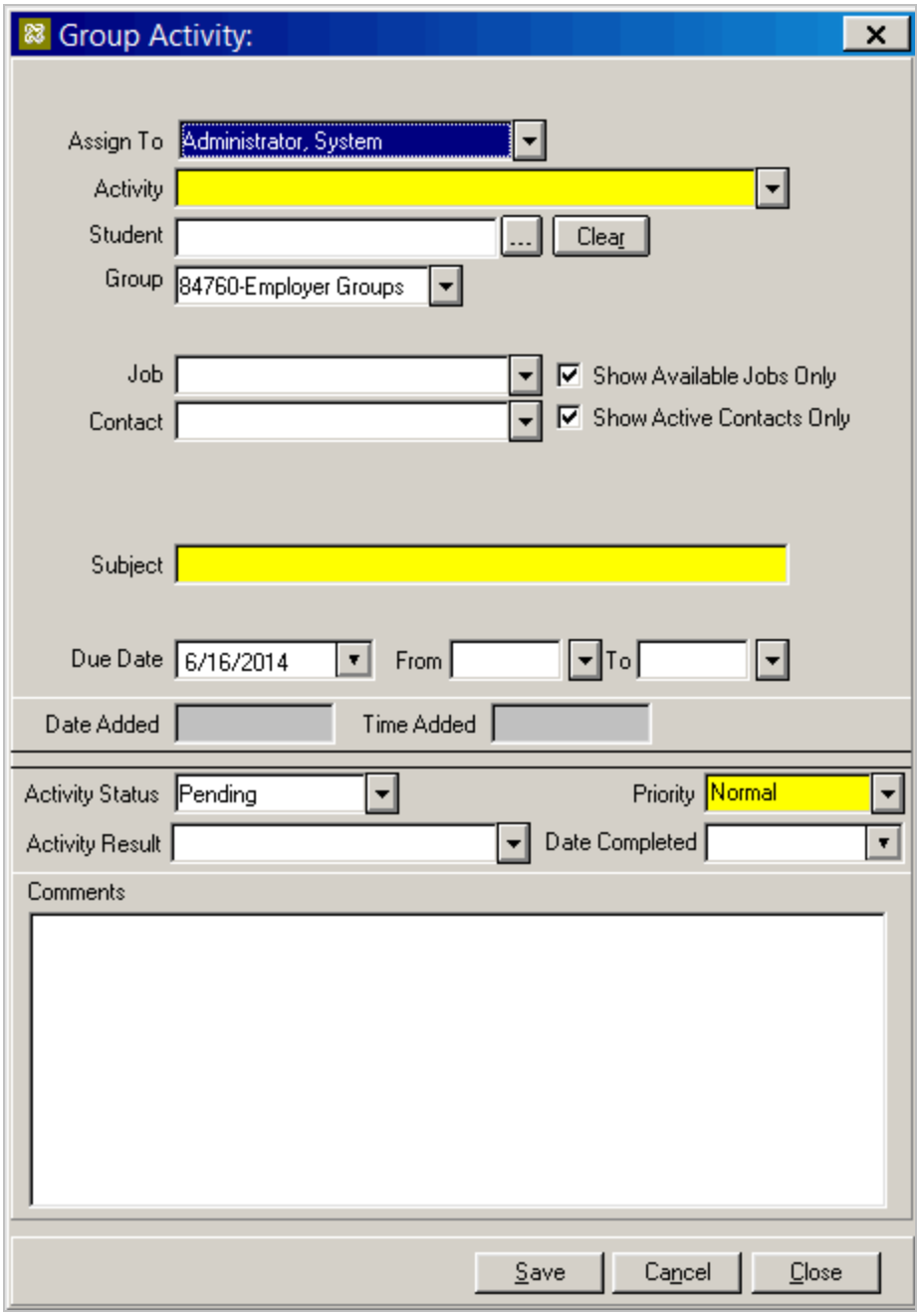


Clear Search Results

Click **Clear Search Results** to clear the search results and begin a new search. Upon clicking this button, the Search Groups button will become available.

Schedule Activity

Click the Schedule Activity button to schedule an activity for the Employer Group. The Group Activity form will appear. Select an activity from the **Activity** drop-down list and enter a subject in the **Subject** line. Click the **Save** button to save the scheduled activity.



Adding a Manual Group

To add a manual group:

1. Navigate to **View > Employer Groups**. The Student Groups form is displayed.
2. Select **Add**.
3. Type a name for the group in the **Group Name** text box.
4. Your name will appear on the **Owner** text box as a default. You can select another name from the drop-down list if necessary.

5. To make the list available to other users, be sure that **Public** has a check mark in the box. The default is to make the group public.
6. To make the list active, be sure that **Active** has a check mark in the box. The default is to make the group active.
7. Click **Save** to save the new group. It will be added to the list.

Note: The group is automatically designated as a "**Manual**" group.

Deleting a Group

Only the owner of the group can delete it from the list of groups.

Deleting an employer group does not remove the employers in the group from the CampusNexus Student database. Deleting an employer group simply dissolves the symbolic relationship of the employers in the group.

To delete a group:

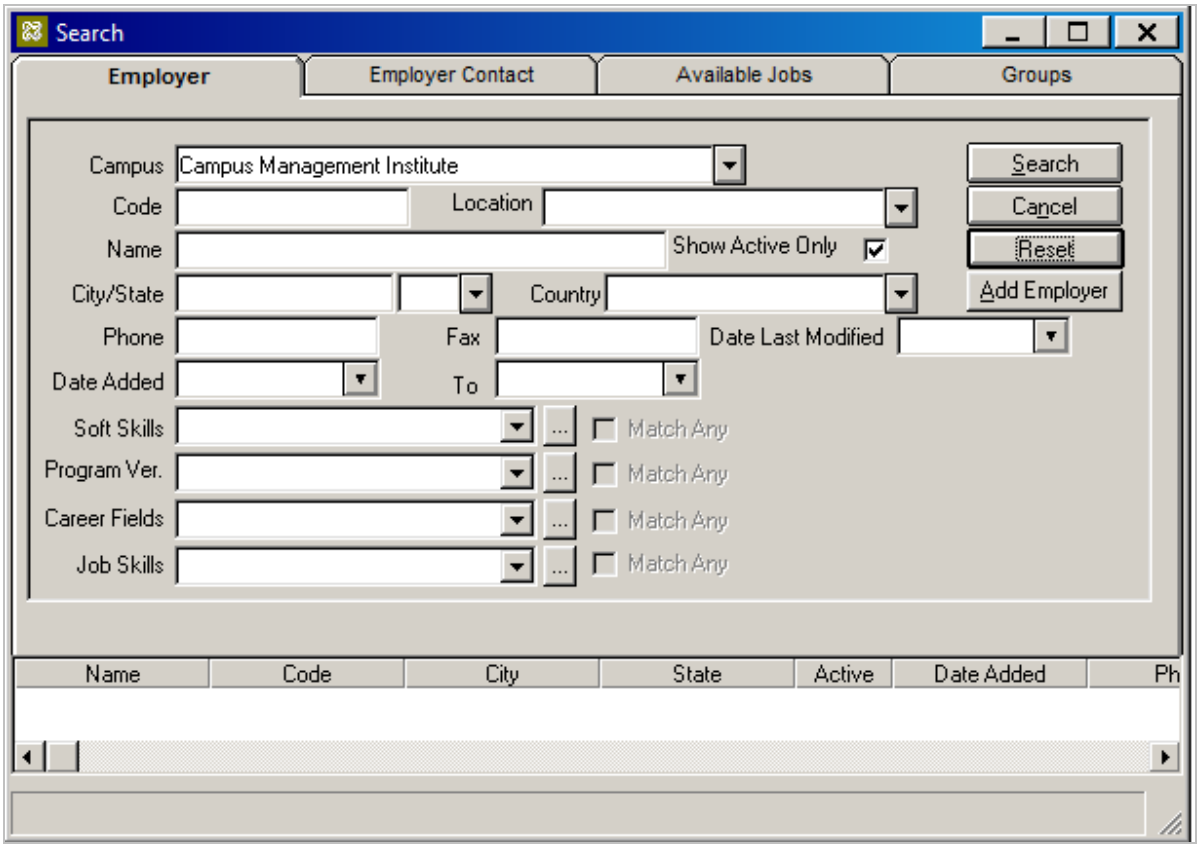
1. Navigate to **View > Employer Groups**. The Student Groups form is displayed.
2. Select (highlight) the group to be deleted.
3. Click **Delete**. Confirm your intention to delete the group.
4. Click **Yes** to confirm the deletion.

Address

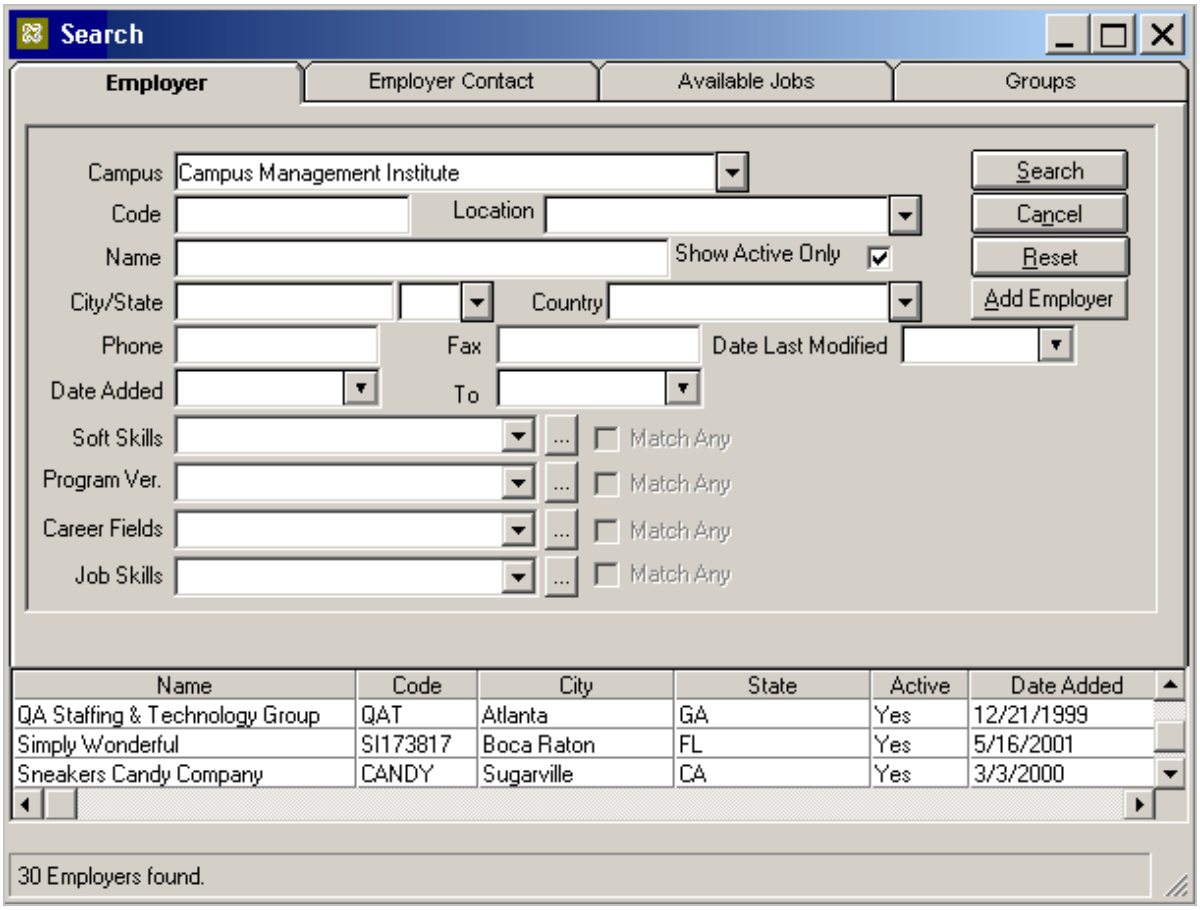
The employer address form contains basic demographic information about a single employer office location.

To edit an employer address:

1. Navigate to **Daily > Career Services > Employers**. The Search form is displayed. The Employer tab is selected by default.



2. On the Employer tab, enter the necessary search criteria to find the employer.
3. Double-click a row on the search results grid to display the employer record.



4. Enter the address data and select options from the combo boxes.

Field Descriptions

Field Label	Description
Code	Enter a unique code to identify the employer. The Employer Code field was changed to accommodate 16 characters.
Active	Check or clear as required.
Name	Enter the name of the employer.
Address	Enter the employer's street address.
City	Enter the employer's city.
State	Enter the employer's state.
Postal Code	Enter the employer's postal code. If you enter the postal code before the city and state, CampusNexus Student fills in the correct city and state.
County	Select the employer's county.

Field Label	Description
Country	Enter the employer's country.
PIN	Enter a 4-digit PIN number that the employer can use when visiting your school's website to enter available jobs. (Each employer must know their code and PIN number to access their data on your website.)
Phone Number	Enter the employer's telephone number.
Ext (Extension)	Enter the employer's telephone extension number.
Fax	Enter the employer's fax telephone number.
Web Site	Enter the employer's website.
Career Services Advisor	Select a Career Services Advisor to assign to this employer.
E-Mail	Enter a general e-mail address for the employer. You can enter e-mail addresses for individual employer contacts under the Contacts tab.
Campuses	Select all campuses that will have access to this employer.
Locations	Select one or more locations associated with the employer.
Primary Location	Select the primary location for the employer from the drop-down list. The options available for selection are those locations that are selected in the Locations field and are marked 'Active'.
Fee	Select **Yes** or **No** to indicate whether your school charges the employer a fee for placing students with the employer. When the Fee field is set to Yes, the field to the right of the Fee field allows you enter a description or an amount .
Industry	Select an industry code for this employer.
Employer Type	Select the employer type. The options are employer only, intern/extern only, or both.
Corporate	Select a corporate entity to which this employer is related.
User	The name of the user who originally entered this employer information is displayed here.
Allow Online Access	Enable this check box if online access is allowed for this employer.
Practicum Site	Enable this check box if this employer is a practicum site.

5. Click **Save**.

If the Comments tab is on top in this form, two Save buttons appear on the form. To save the address data, click the Save button in the top half of the form under the address information. The other Save button saves the Comments field.

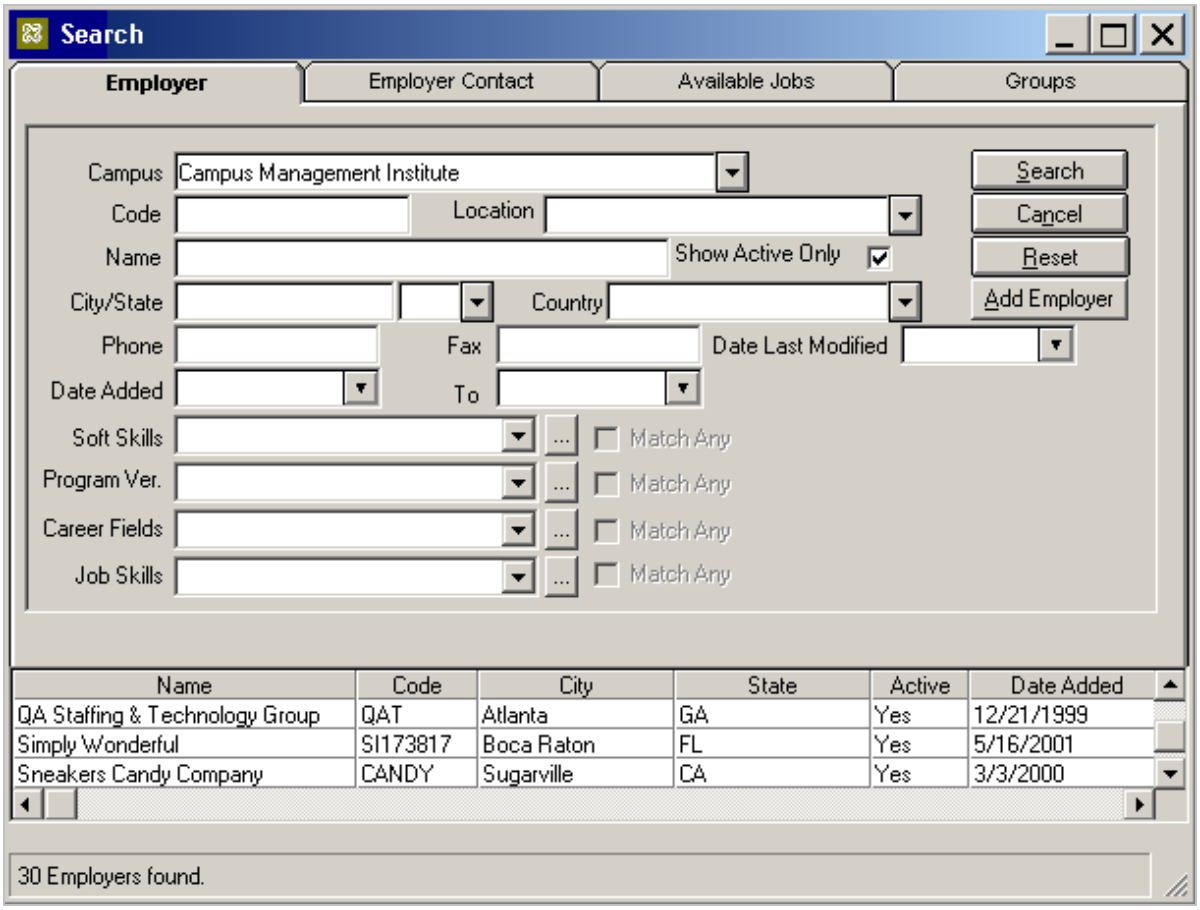
6. To edit any other data for this employer, click the Contacts, Available Jobs, or Placement History tabs.
7. Click **Close** to close the form.

Employer Comments

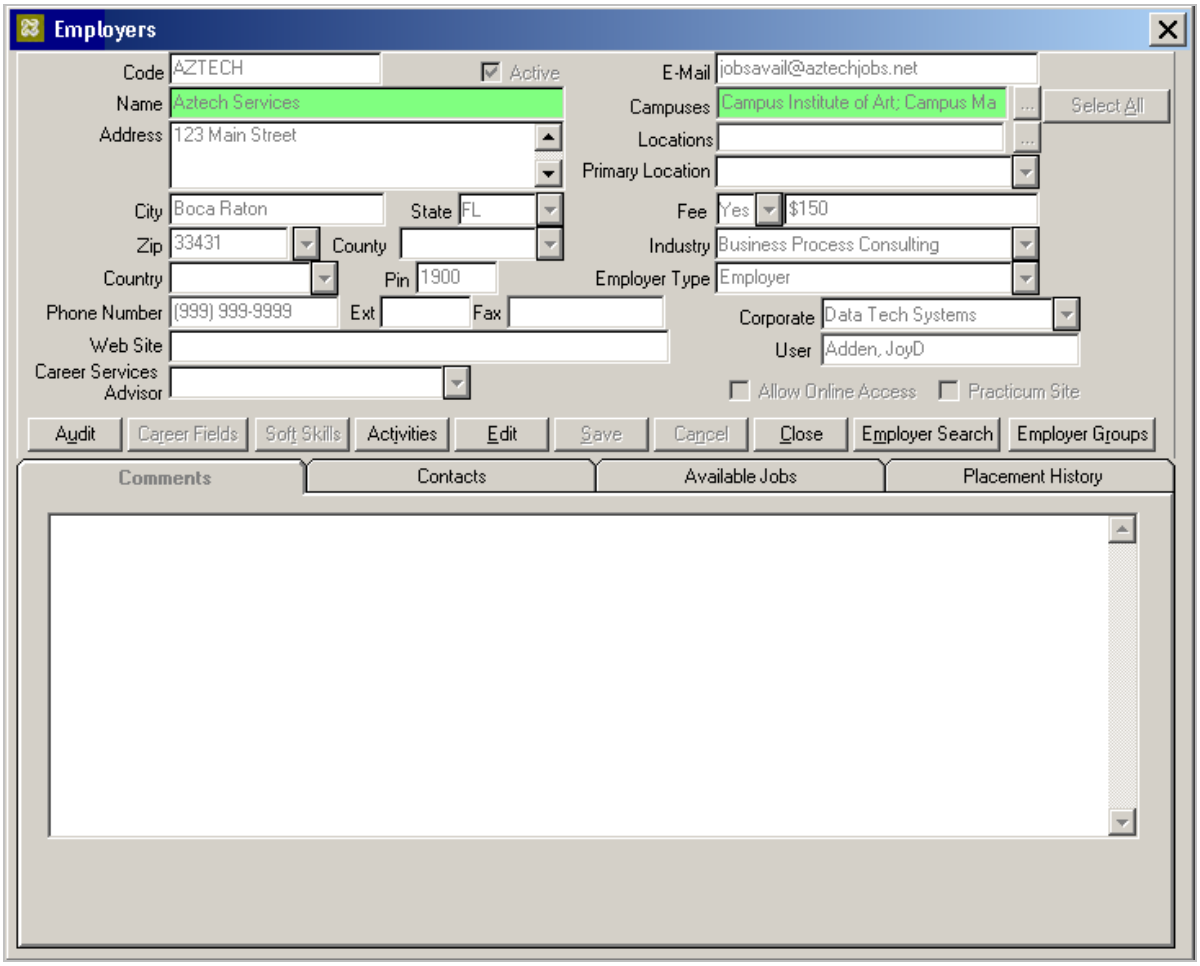
You can enter free-form text comments for a selected employer. This field is available for any comments you care to enter.

To enter or view comments for a selected employer:

1. Navigate to **Daily > Career Services** > **Employers**. The Search form is displayed.



2. Select an employer (see the topic titled Employers for more about searching). Click **Edit** to enable the Comments tab.



3. Enter any new comments or change any that are already recorded.

   Note: To maintain a visible history in the Comments text box, adopt the convention of including the date of the comment and the initials of the person who entered the comment.

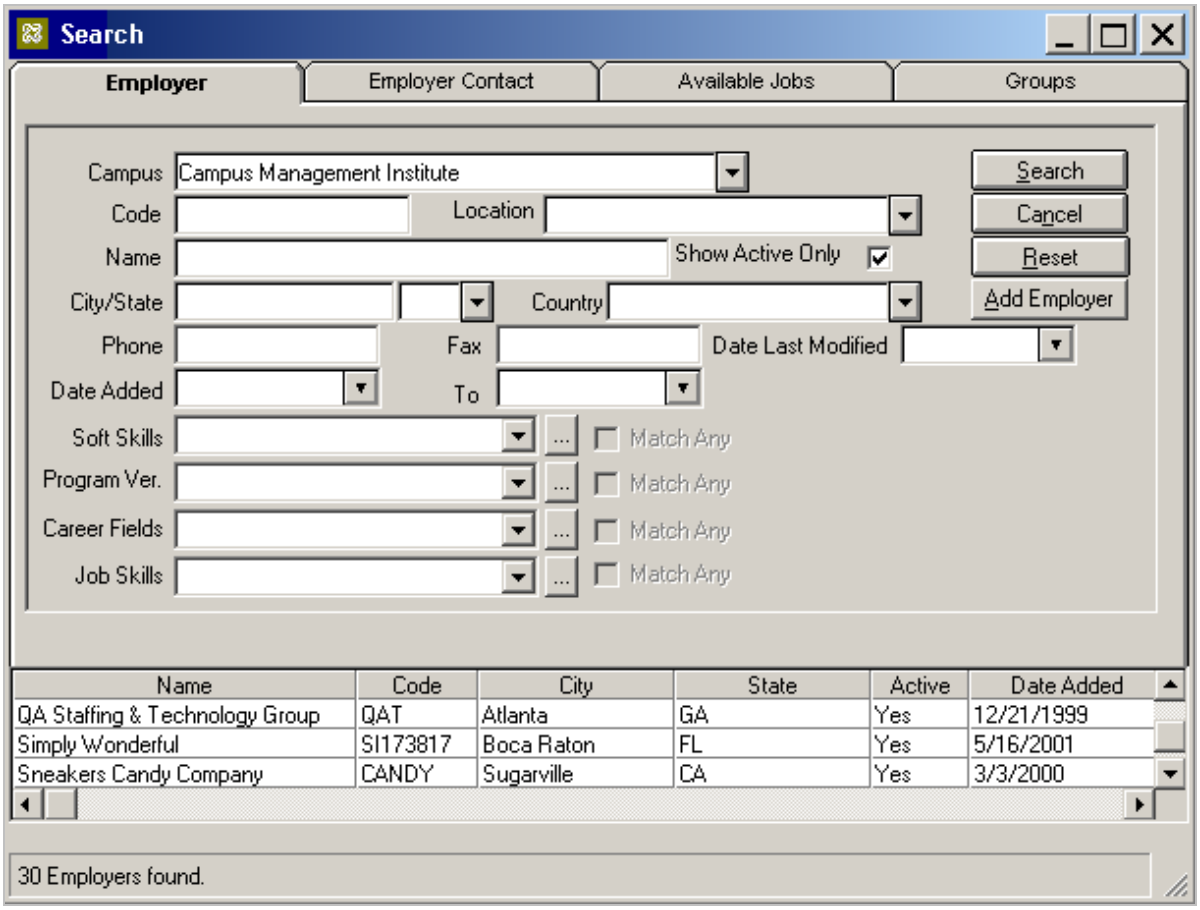
4. Click **Save** to save any changes you make to the Comments text box.
5. A confirmation message is displayed. Click **OK**.
6. Click **Cancel** to cancel any changes you may have made to the Comments text box.
7. Click any of the other Employer tabs to view or change other data for the selected employer.
8. Click **Close** to close the form.

Contacts

You can have as many employer contacts as you want for each employer. All the contacts on the grid are related to the employer location described in the Address information at the top of the form. When adding a new employer, you must save the employer (Address) record before the Contact tab is enabled.

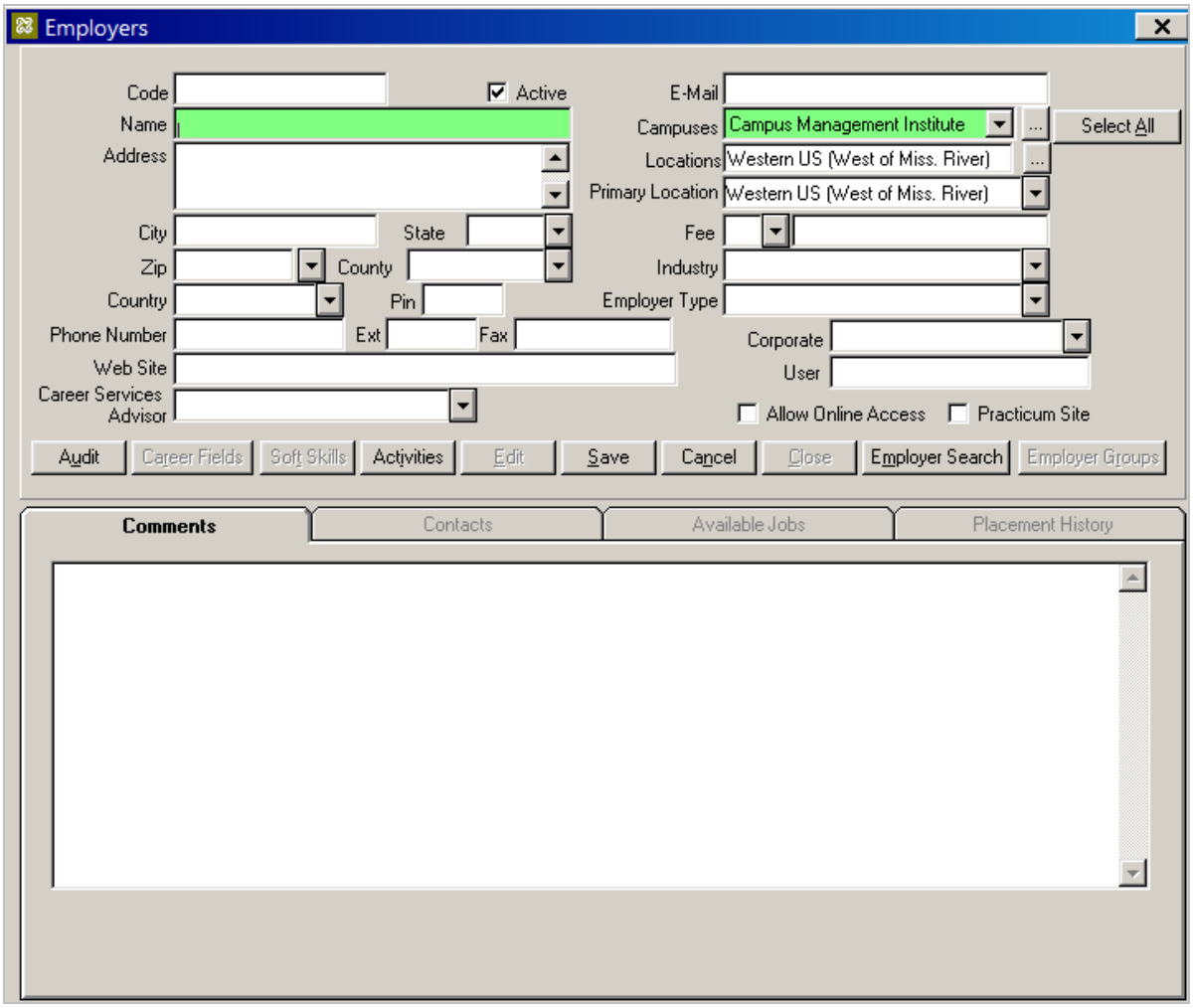
To add a new contact for an employer, or to view or edit an existing one:

1. Navigate to **Daily > Career Services > Employers**. The Search form is displayed. The Employer tab is selected by default.
2. To view or edit an existing employer record, select the **Employer** tab and enter the appropriate search criteria to find an employer.



3. **Double-click** a row on the search results grid to display the selected employer's record. The Employers form is displayed. See Add Employers to add a new employer.

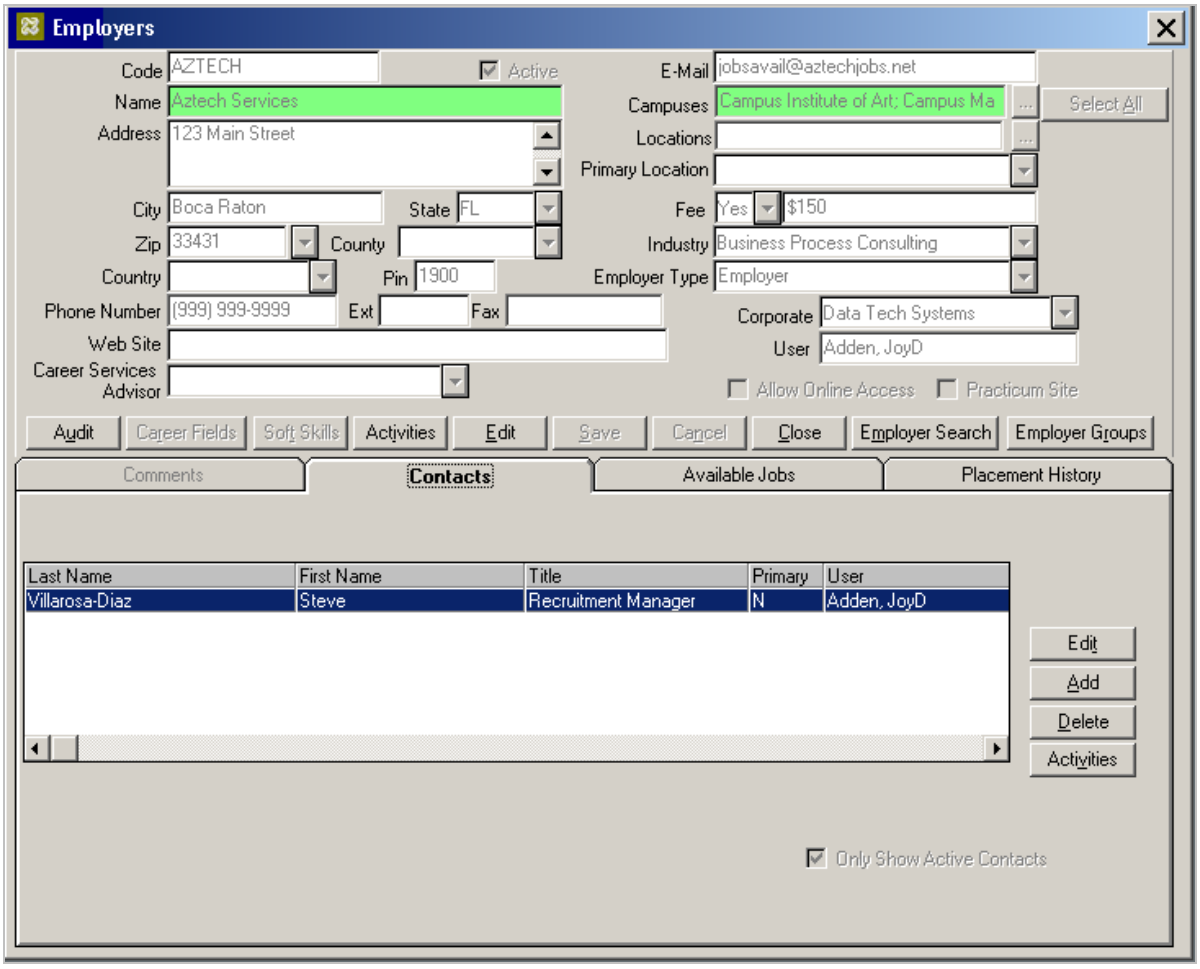
   For information about the address data entry fields, refer to the Address topic.



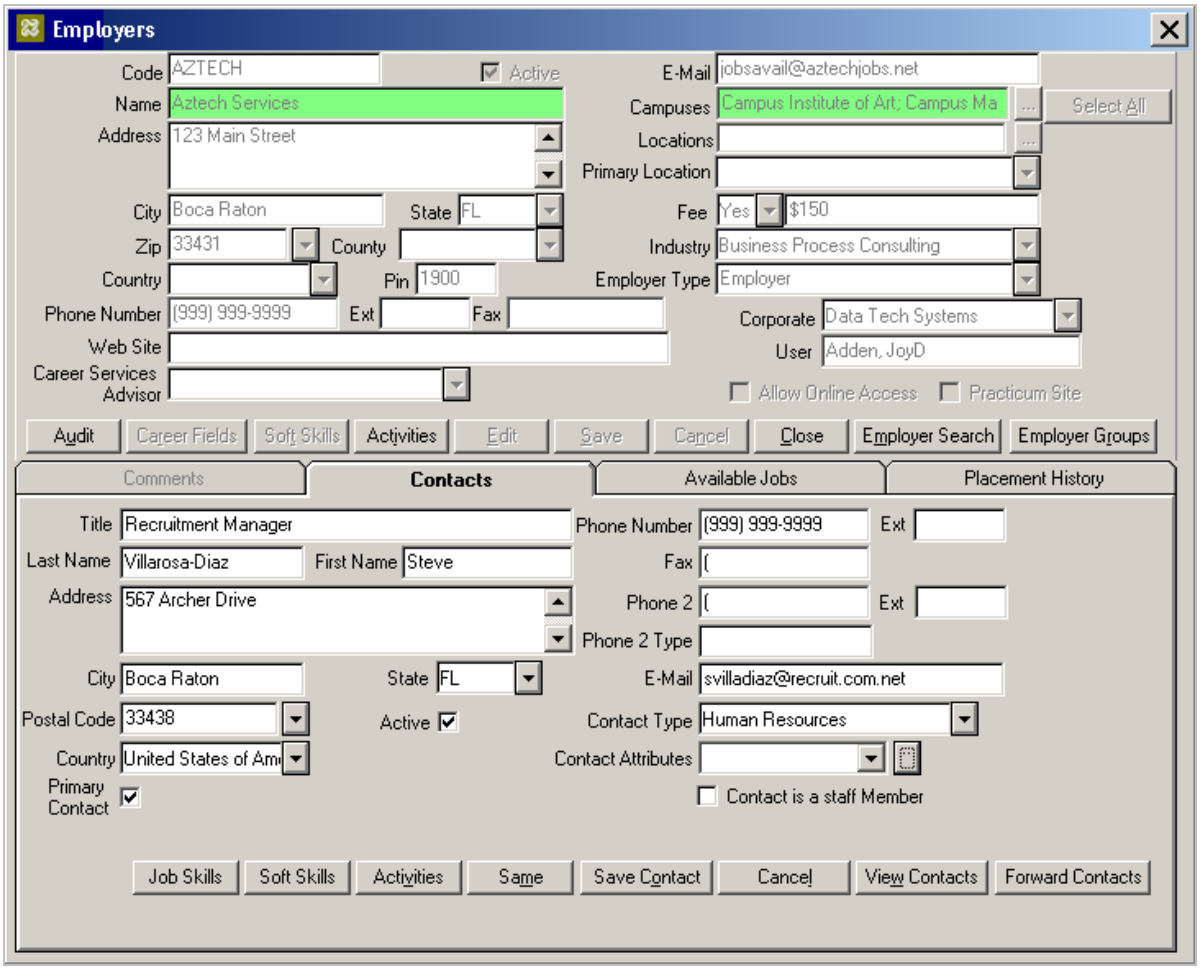
4. Click the **Contacts** tab.

   The contact list shows the Last Name and First Name of the contact, the contact Title, whether this person is the Primary contact (Y) or not (N), and the name of the User who entered the contact.

5. Click **Add** to add a new contact.



6. **Double-click** an existing contact row in the list or select the row, and click **Edit** to view or change the data.



7. Enter or change the contact name and address information. Click **Same** to enter the employer's address information for the contact.
8. The **Active** check box is selected by default. A contact can be made inactive by clearing this check box. Inactive contacts no longer appear in the Contact drop-down list on the Available Jobs tab.

   To help prevent users from assigning activities to a business contact for an employer that no longer has an active relationship with the campus, the system automatically inactivates all associated employer contacts when an employer is made inactive or deleted. If an employer is reactivated and there are inactive employer contacts associated with the employer record, a message is displayed to remind the user to manually update the employer contacts to reactivate them.
9. Select a **Contact Type** from the drop-down list.
10. Select the applicable contact attributes from the **Contact Attributes** drop-down list.
11. If the contact is a staff member of the campus, select the **Contact is a staff Member** check box, and select the name from the drop-down list.
12. Click **Save Contact** to save your contact information. The program returns to the **Contacts** tab.
13. Click **View Contacts** to return to the grid in the Contacts tab.
14. After viewing the contact information detail and saving any changes, you can click on any of the other tabs on the

Employers form.

Button Descriptions: Contacts Tab

Button	Description
Job Skills	Launches a form to associate job skills to this employer contact.
Soft Skills	Launches a form to associate soft skills to this employer contact.
Activities	Launches the **Contact History** form to view and manage associated activities for this employer contact.
Same	Creates a new contact based on the current contact's information.
Save Contact	Saves the contact information.
Cancel	Discards your changes to this contact.
View Contacts	Displays contacts for this employer. The grid can be filtered by the **Only Show Active Contacts** check box.
Forward Contacts	This allows you to forward a contact activity to another staff member. This is useful in sharing contact information if the other staff member does not have access to the employer without having to change the user's access security privileges.

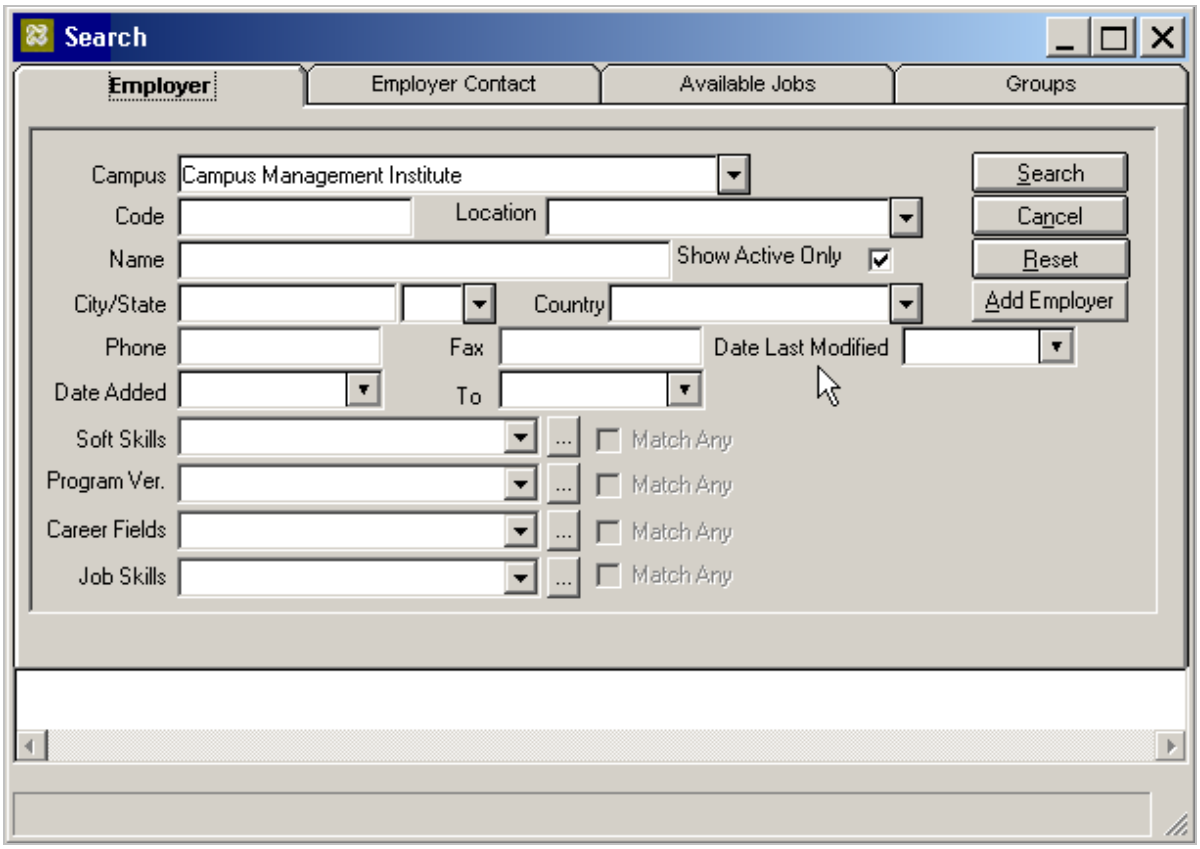
Placement History

As available jobs are filled with students from your school, placement history records are created and linked to the employer. **You can only view these records**. Placements for a selected student are initially recorded and edited via the menu option View > Career Services > Placements.

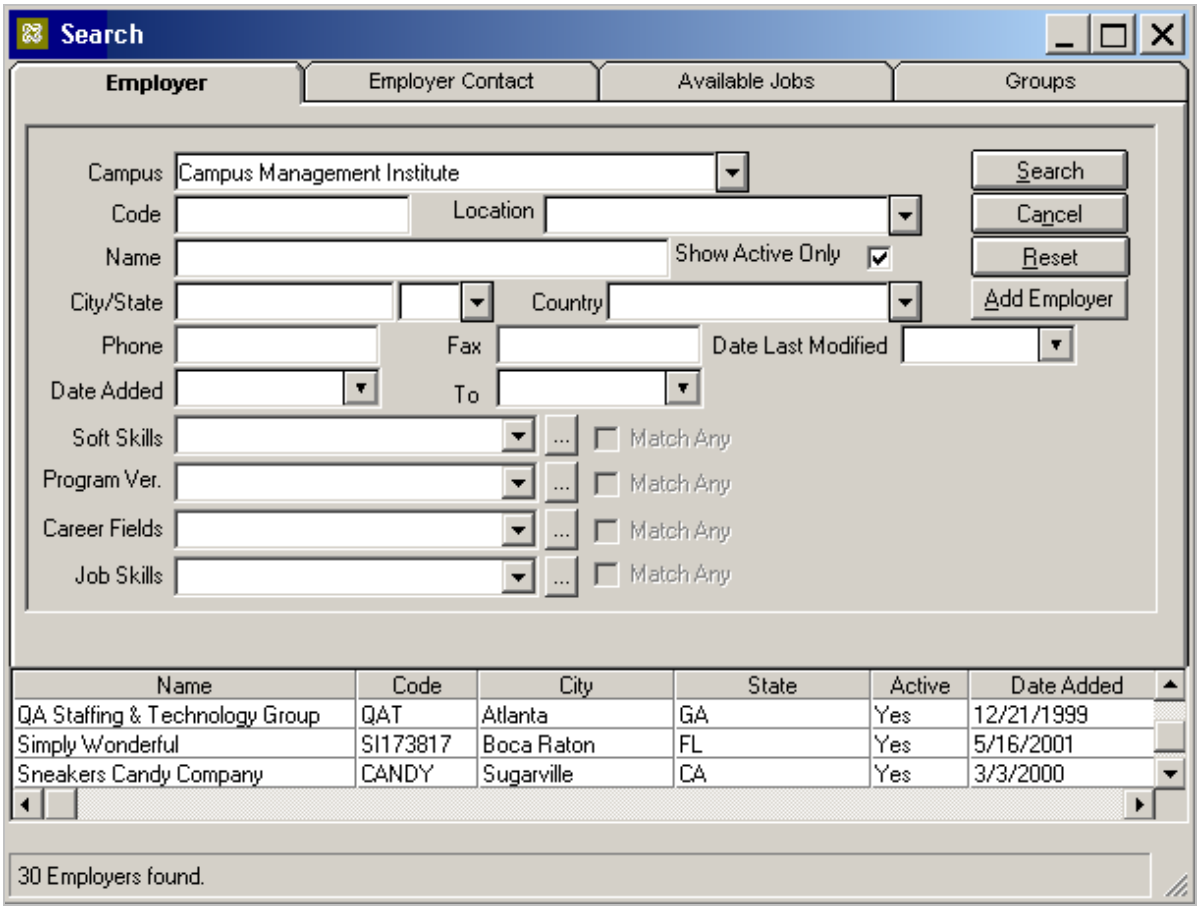
On the Employer's Placement History list, CampusNexus Student shows a line item for each position filled when a listing is for multiple positions. (In other words, if an employer has a single listing with three openings for a Visual Basic Programmer, you will see three different line items on the employer's history when all openings are filled.)

To view an employer's placement history:

1. Navigate to **Daily > Career Services > Employers**. The Employers Search form is displayed.

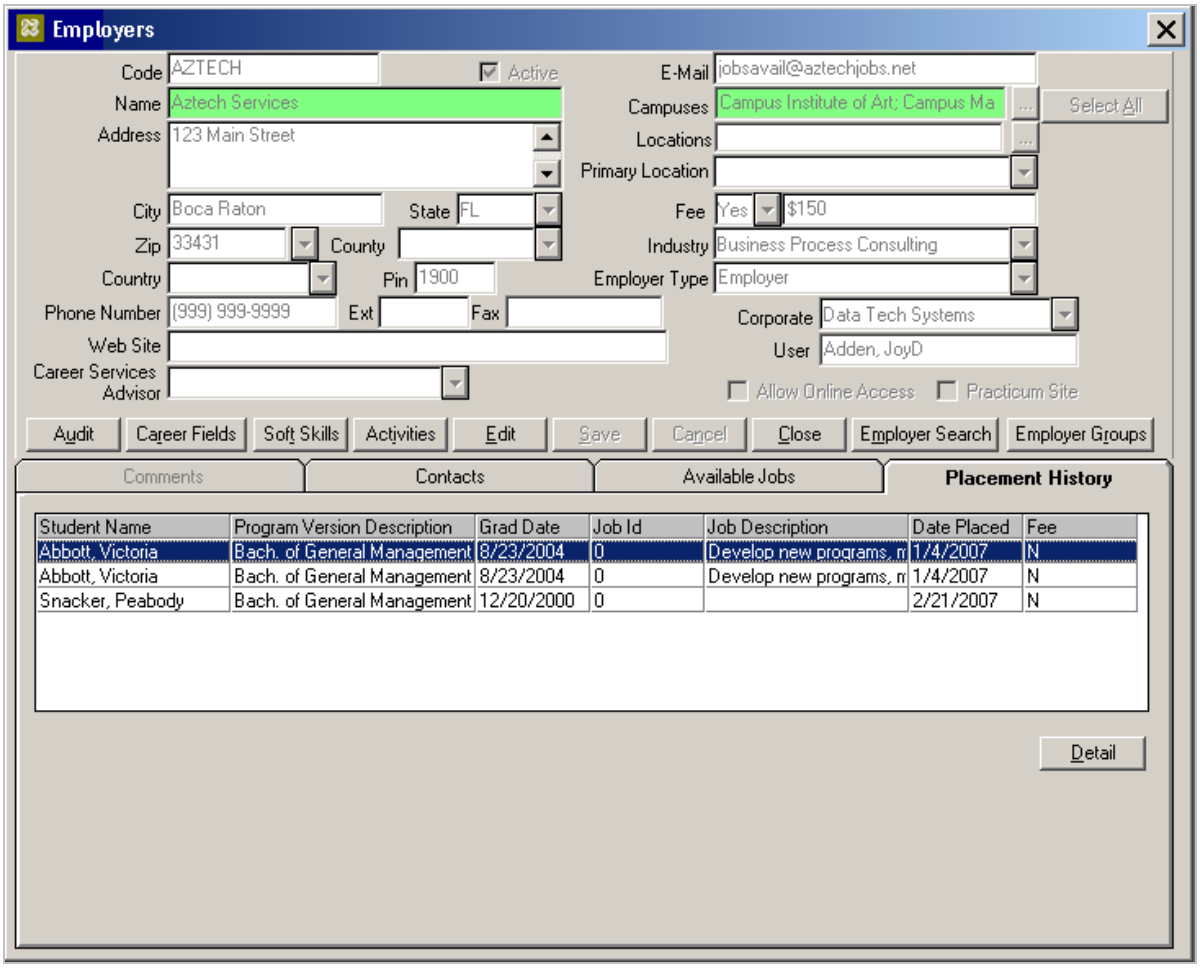


2. Click **Search**. A list of employers is displayed. Select an employer from the list.



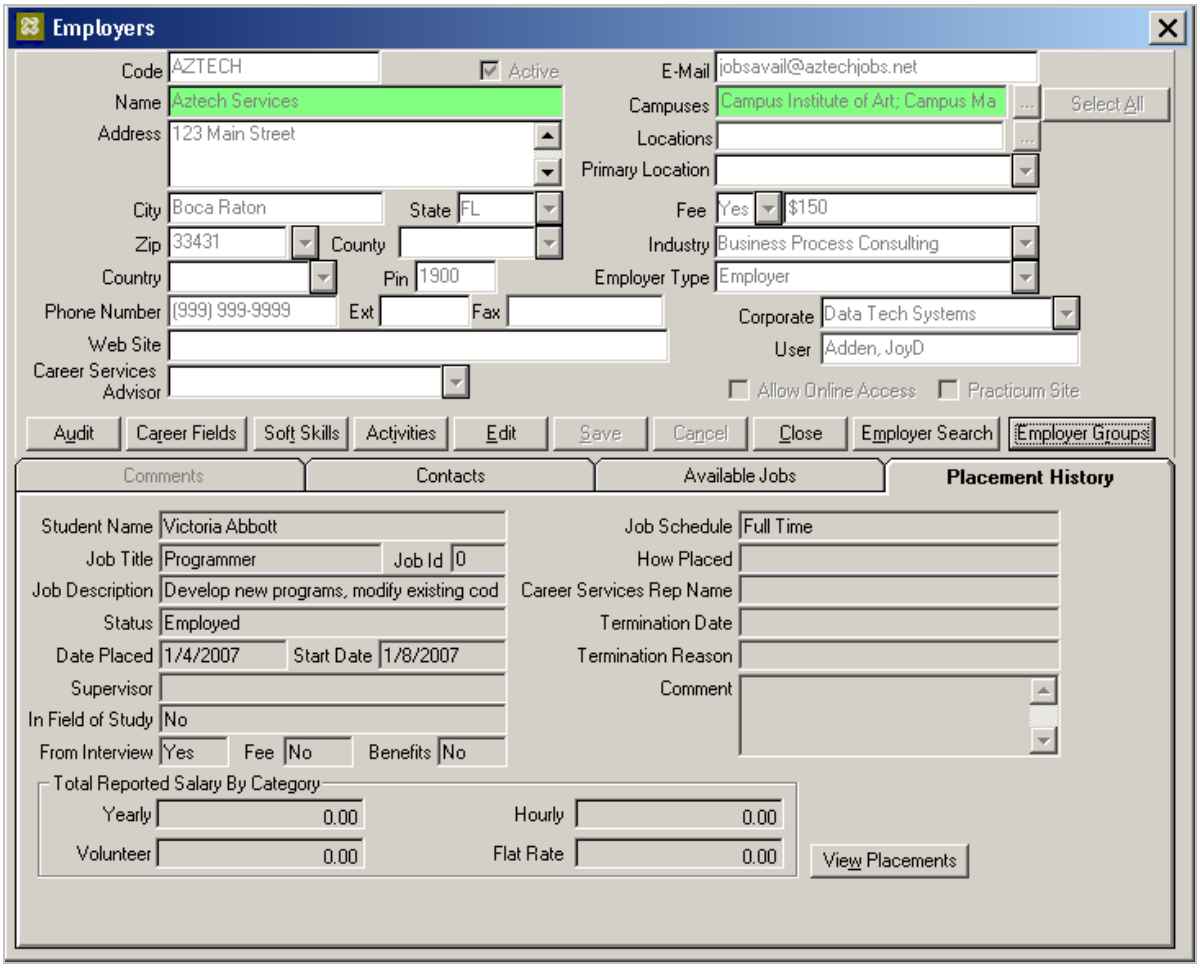
3. The Employers form is displayed containing the employer that you selected above.

   Click **Edit** to activate the Placement History tab. Click the **Placement History** tab.



4. Select a placement item from the lists of placements and click **Detail**. You can also double-click the row. The information about the student who was placed in the position is displayed. The data is read-only in this form. Placement history data can only be edited from the View > Career Services > Placements menu option.

5. Click **View Placements** to return to the list of placements for the selected employer.



6. Click any of the other tabs on the Employers form to see other information about the selected employer.
7. Click **Close** to close the form.

Employer Activities

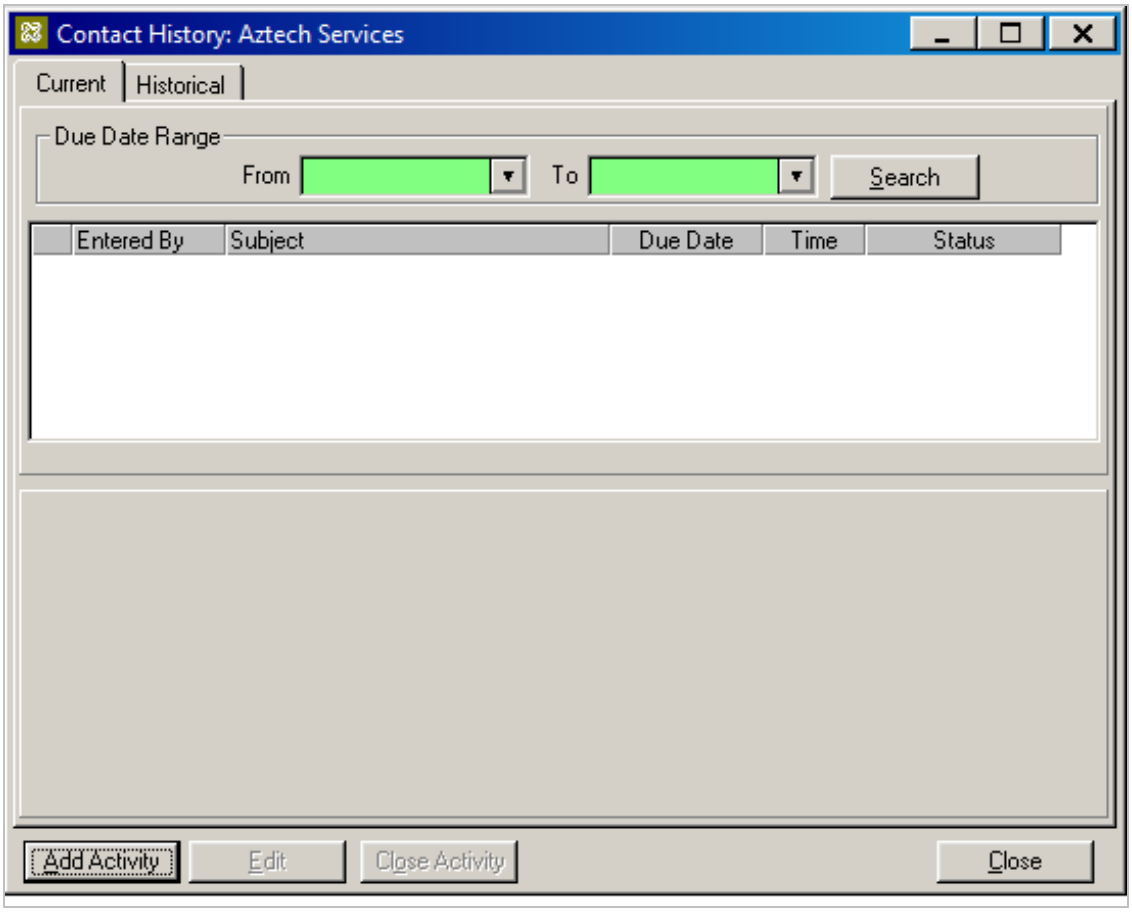
The Employer Activities feature allows you to maintain a list of activities related to a given employer. The employer activities are assigned to specific staff members and can be related to specific students. It is not necessary to relate an employer contact to a student.

Before you begin to use employer activities, set up employer-related activities under Lists > Contact Manager > Activities. You can set up outgoing and incoming phone calls, letters, meetings, and so on. Employer-related activities appear on the staff member's **Contact Manager** form and the **Daily Calendar** form.

To work with the employer activities forms:

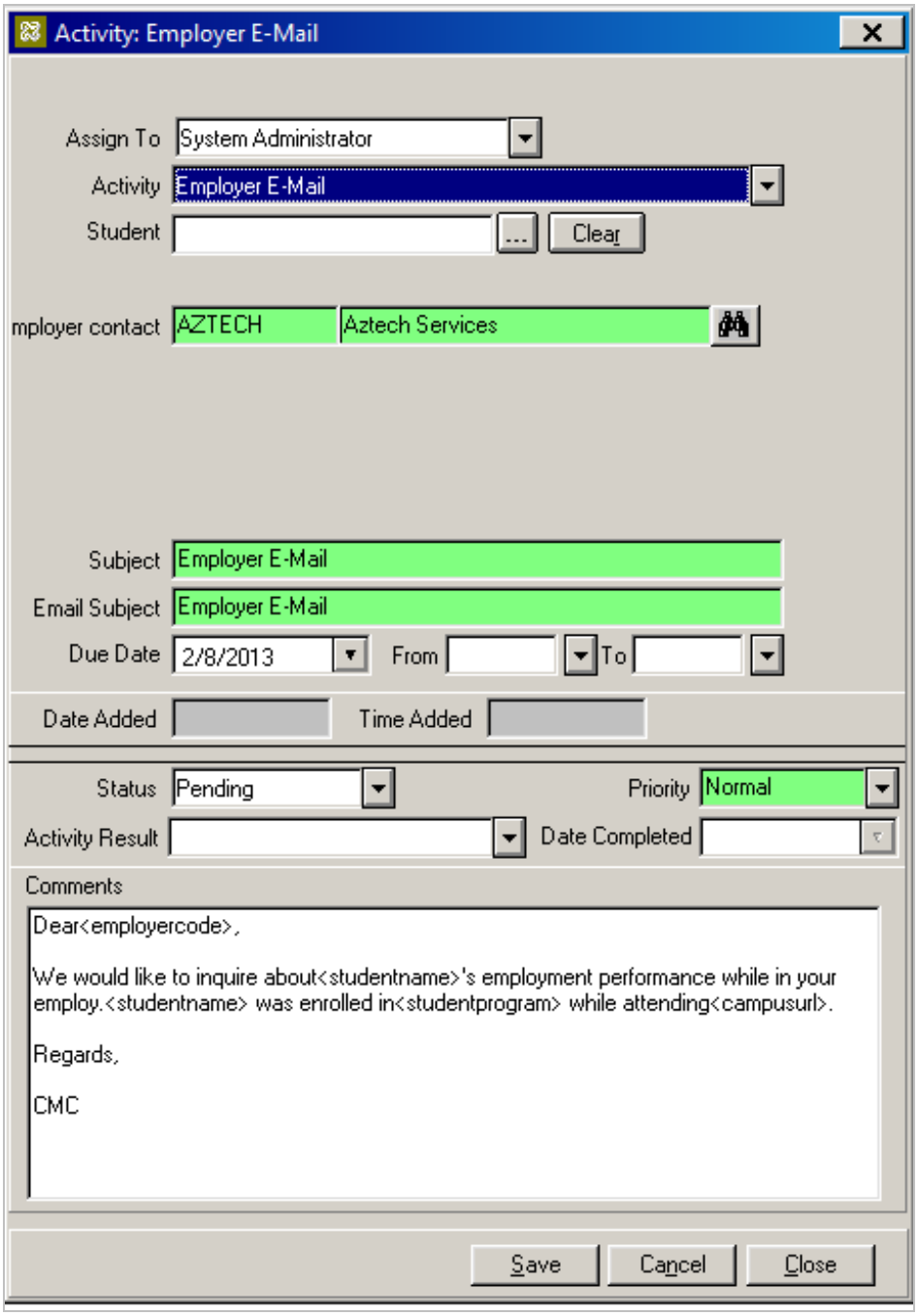
1. Navigate to **Daily > Career Services > Employers**. The Search form is displayed.
2. Click **Search**.
3. In the search results, select the employer for which you want to view or add an activity. The Employers form is displayed.
4. Click **Activities**. The Contact History form is displayed. This form lists all activities related to the selected employer.

   Note: You can filter the list of activities by specifying a Due Date Range.

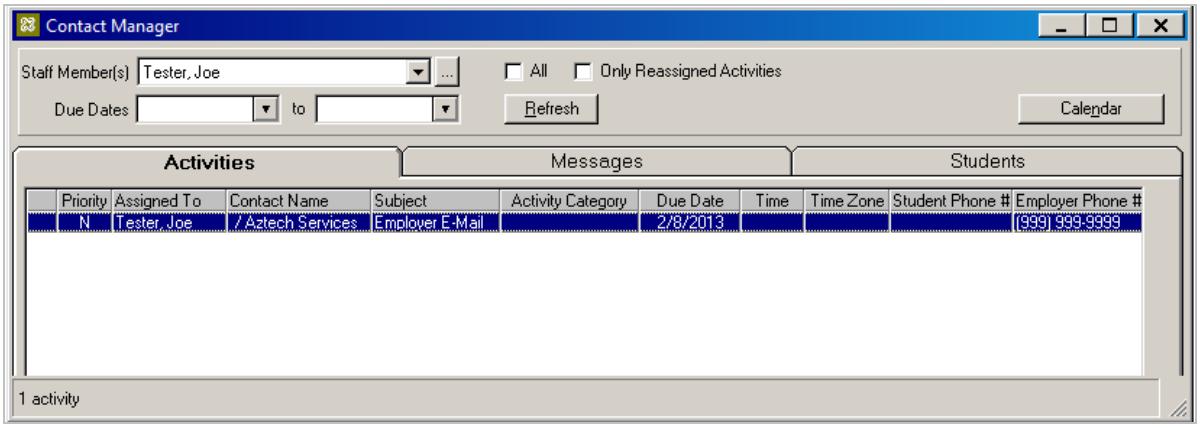


5. Click **Add Activity** to add a new activity, or select an activity on the grid, and click **Edit** to see the details. The

Activity form is displayed.



6. Add or edit the activity data as required. When you add an activity, you must select it from the list of activities that have been previously set up under Lists > Contact Manager > Activities.
7. Click **Save** to save your new activity or changes to an existing activity. The Activity form is closed and the activity is added to the Contact Manager Activities list of the assigned staff member.
8. To view the activity on the Contact Manager form, navigate to **Daily > Contact Manager > Contact Manager** and select the appropriate staff member.



9. Click **Close** to close the form.

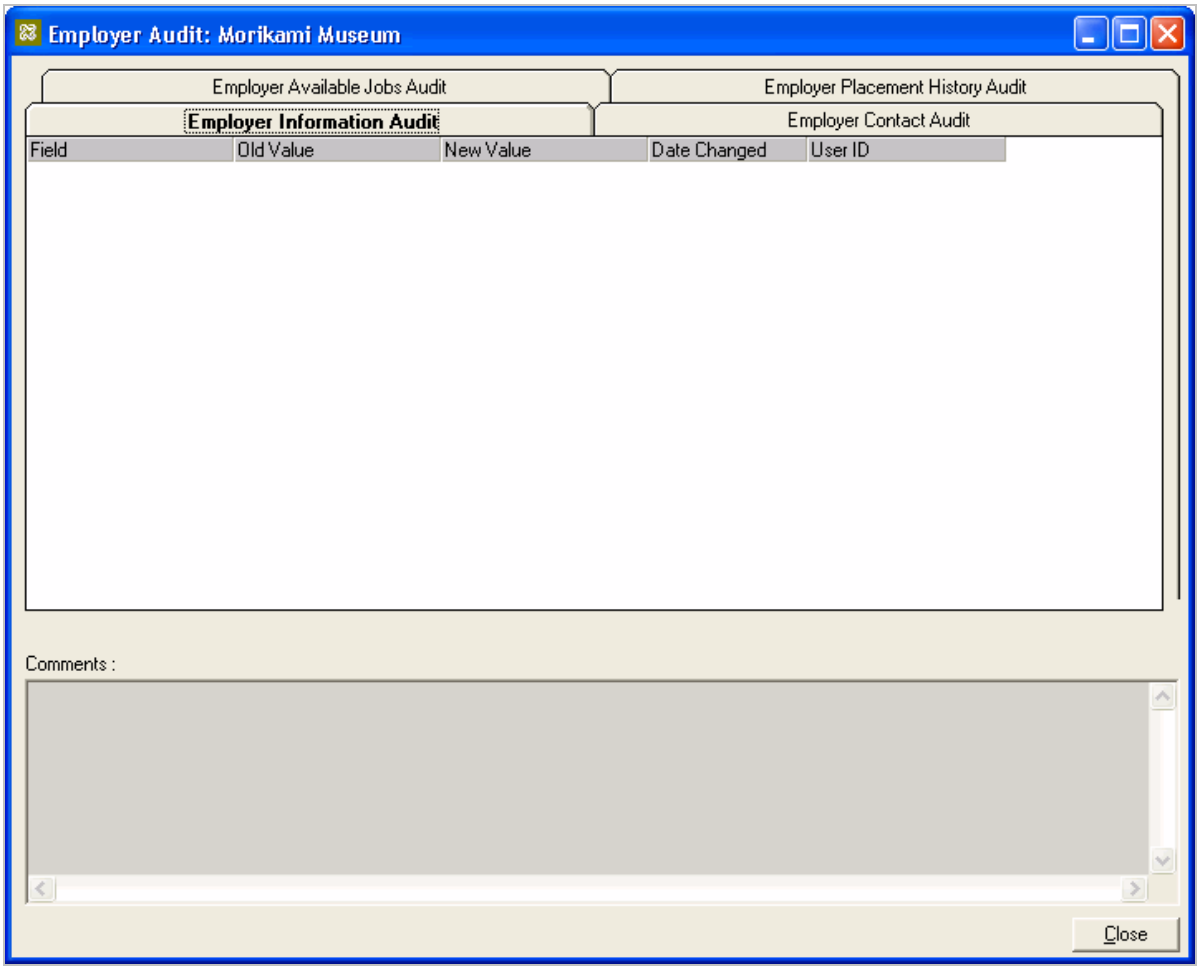
Employer Audit

The Employer Audit feature is accessed from the **Audit** button on the Employers form and allows you to view changes made to employer records. It includes any changes made to employer information, employer contact information, available jobs, and employer placement history. The information is read-only and can only be modified by using the employer record forms.

To view the employer audit information:

1. Navigate to **Daily > Career Services > Employers** and select the employer whose record you want to view; or, click the employer from the **Recent Employers** list.
2. In the Employers form for the selected employer, click the **Audit** button. The Employer Audit form is displayed.

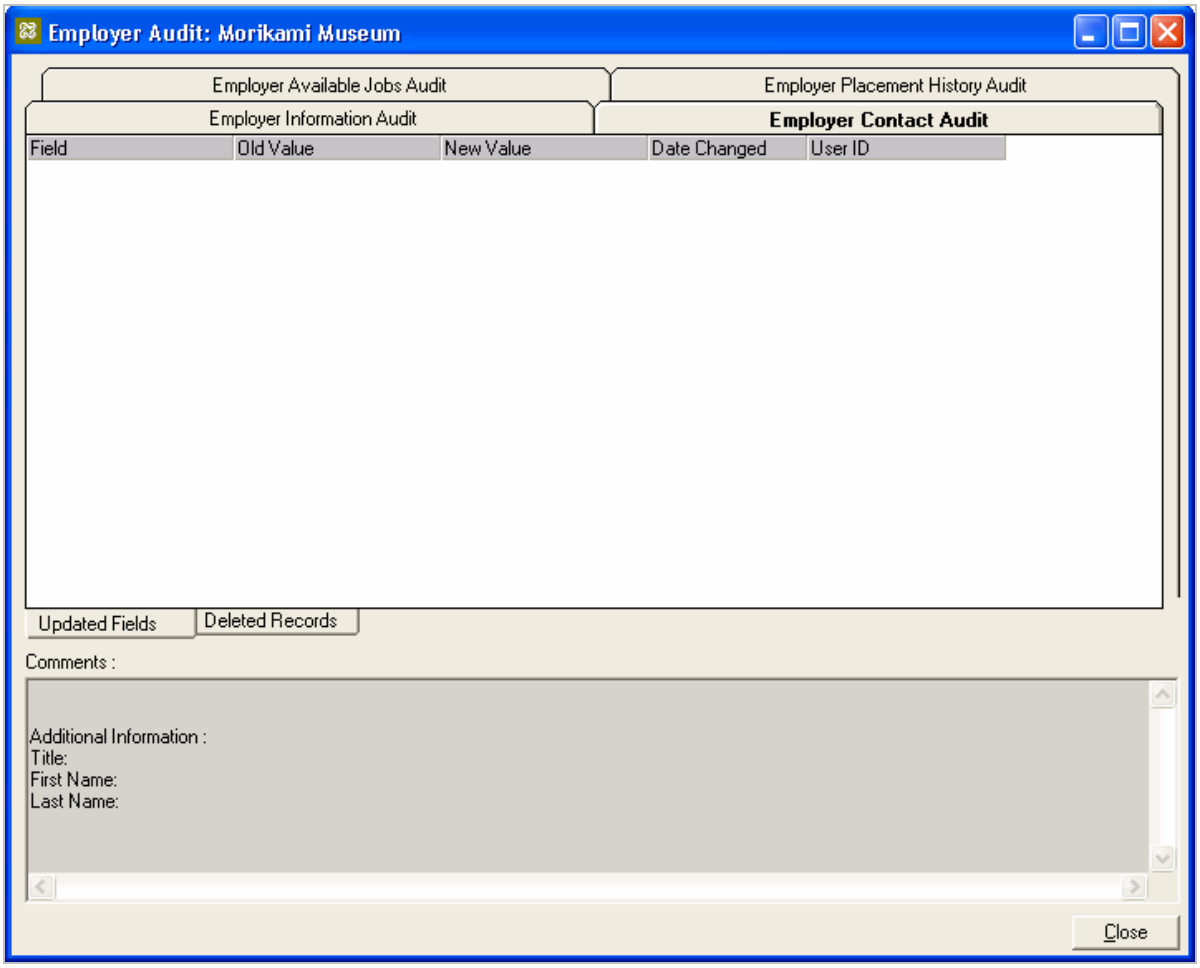
   The default tab is the **Employer Information Audit** tab which displays any changes made to the employer information. It also shows the date the information was changed, and who made the change



3. Click the **Employer Contact Audit** tab to view the audit information for employer contacts.

   This tab displays changes made to the employer contact information. If there are any comments associated with the change, they will appear in the **Comments** field at the bottom of the form.

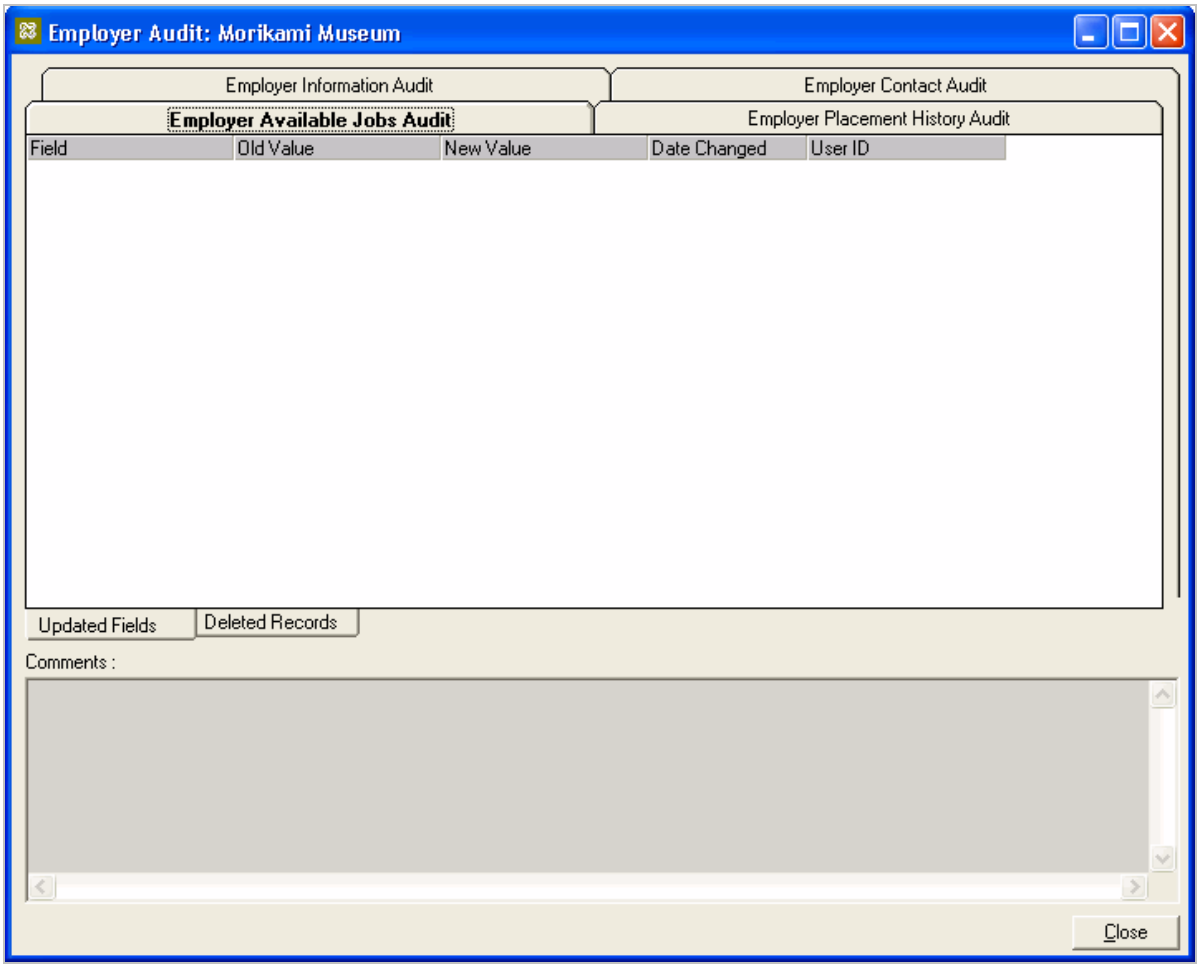
   Two tabs above the Comments field allow the user to view **Updated Fields** (the default view) or **Deleted Records**



4. Click the **Employer Available Jobs Audit** tab to view the audit information for employer's available jobs.

   This tab displays changes made to the available jobs for this employer. If there are any comments associated with the change, they will appear in the **Comments** field at the bottom of the form.

   Two tabs above the Comments field allow the user to view **Updated Fields** (the default view) or **Deleted Records**.

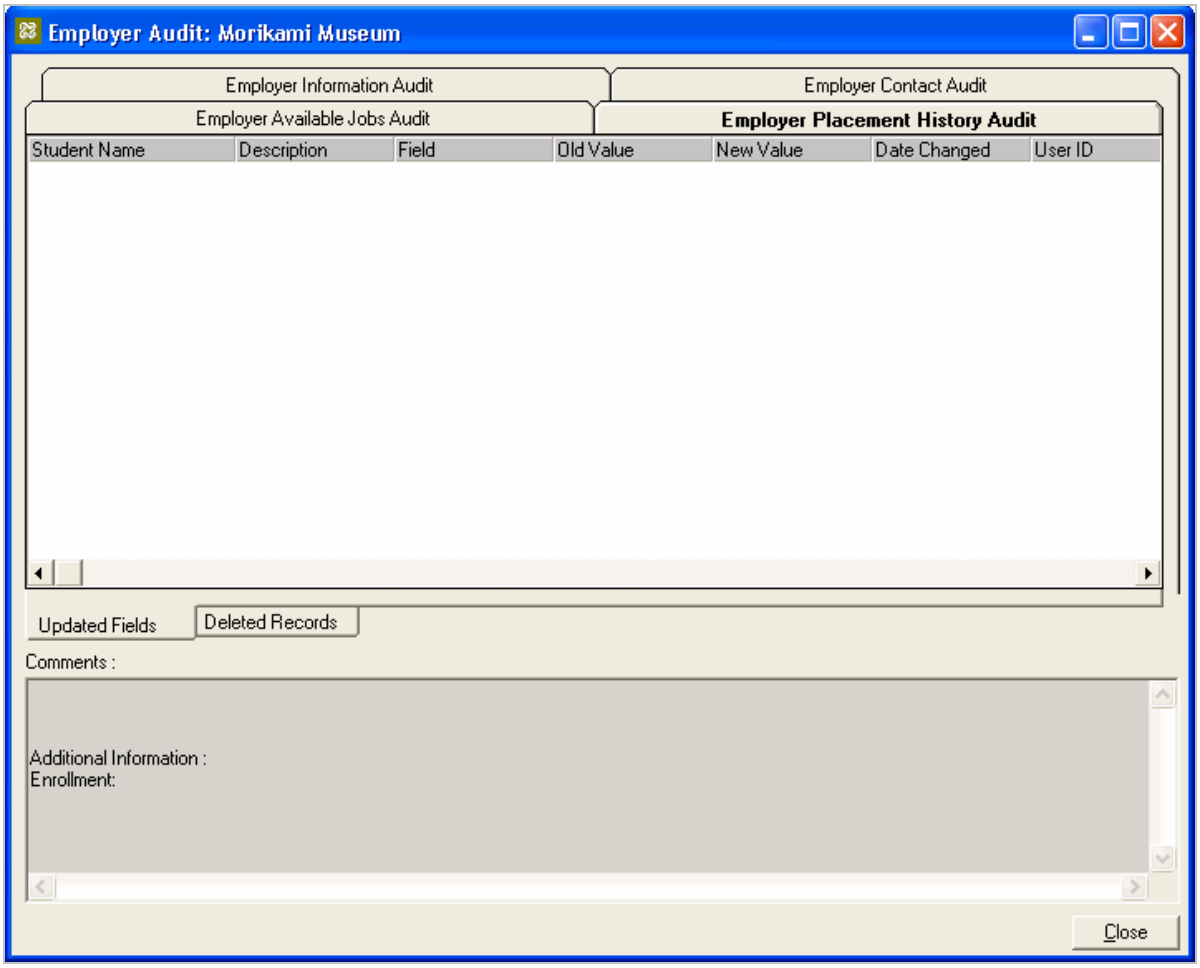


5. Click the **Employer Placement History Audit** tab to view the audit information for employer placement history.

   This tab displays changes made to the employer's placement history information.

   If there are any comments associated with the change, they will appear in the **Comments** field at the bottom of the form.

   Two tabs above the Comments field allow the user to view **Updated Fields** (the default view) or **Deleted Records**



6. Click **Close** to close the form.

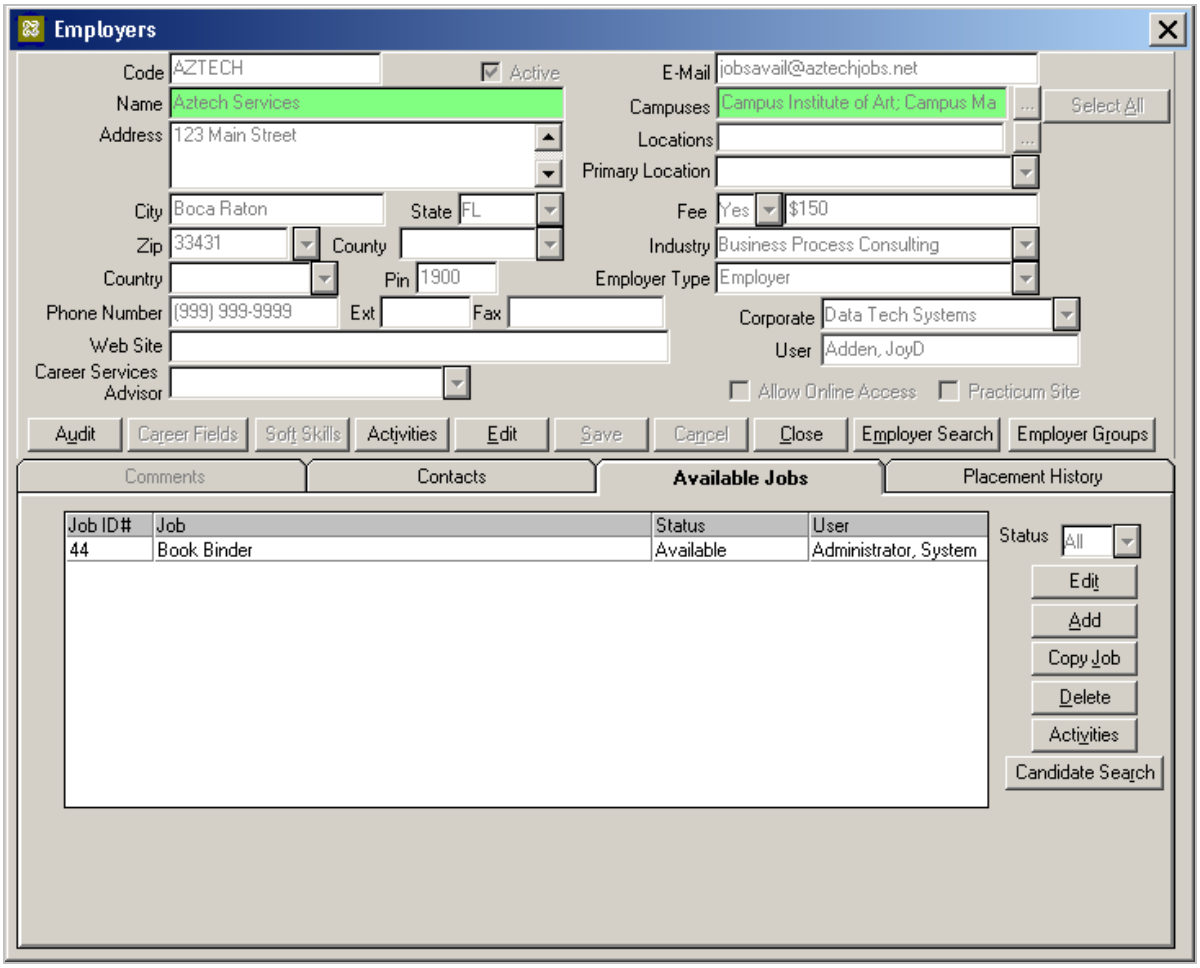
Available Jobs

At any given time, an employer may have many available jobs listed with your Placement department. You can enter and edit these jobs with this form. An employer may have multiple openings for the same job description. You can indicate the number of openings available. As your students are placed in these jobs, the program will update the number of openings filled.

Students are placed in the available jobs via the View > Career Services > Placements option. There, you will select a student and match the student with an available job.

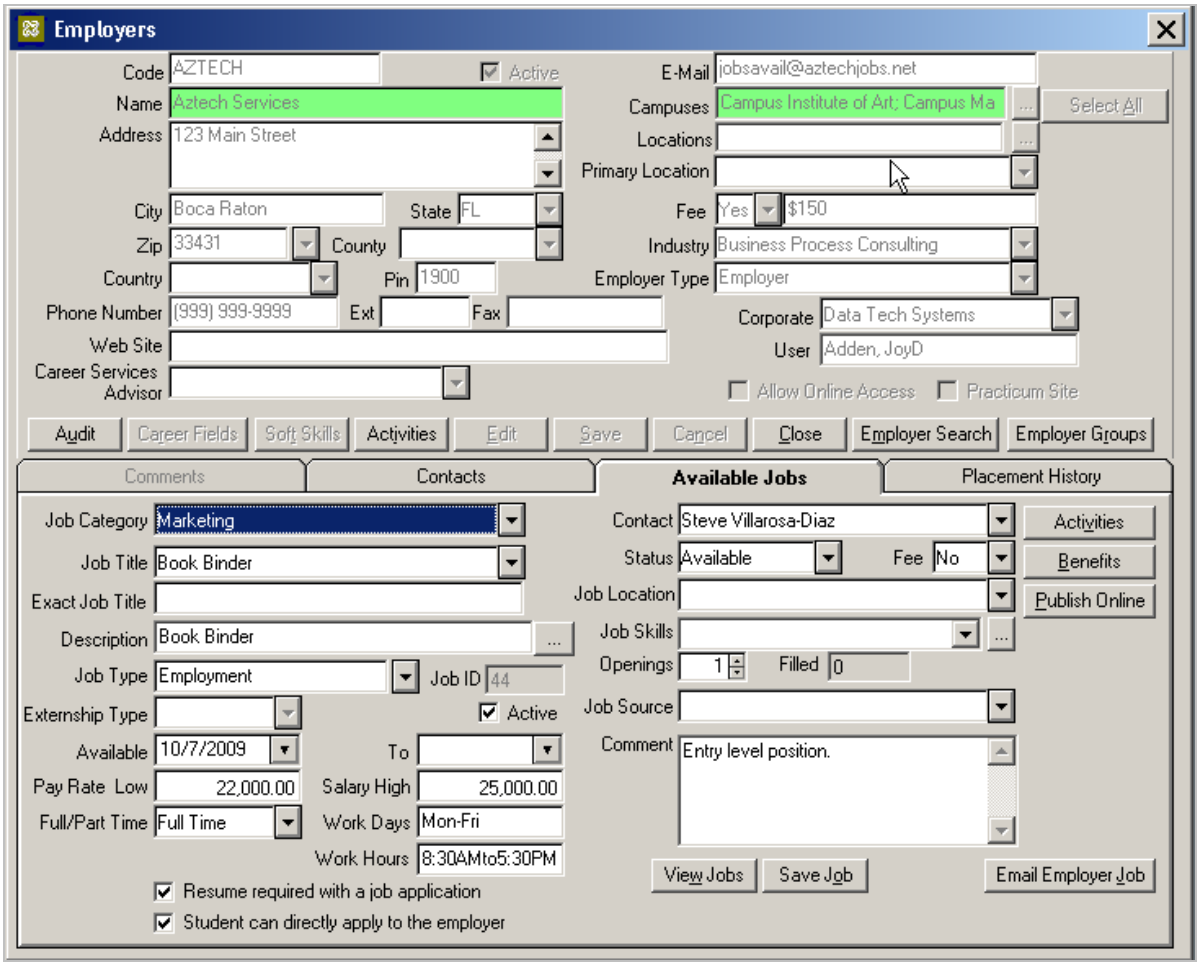
To add or edit an available job:

1. Navigate to **Daily** > **Career Services > Employers**. The Search form is displayed.
2. If the available job is for a new employer, click **Add Employer** and enter the Address and Contacts data.
3. If the available job is for an existing employer, find and select the employer using the **Search** feature.
4. When you double-click an employer from the grid, the **Employers** form is displayed. Click the **Available Jobs** tab to display a list of previously listed jobs for the selected employer.



5. To reduce a long list of available jobs, select a job status filter from the **Status** drop-down list available to the right of the job grid.
6. On the lower half of the form, click **Add** to add a new available job, or select a job in the grid, and click **Edit** to see

the details. The form changes to the format below.

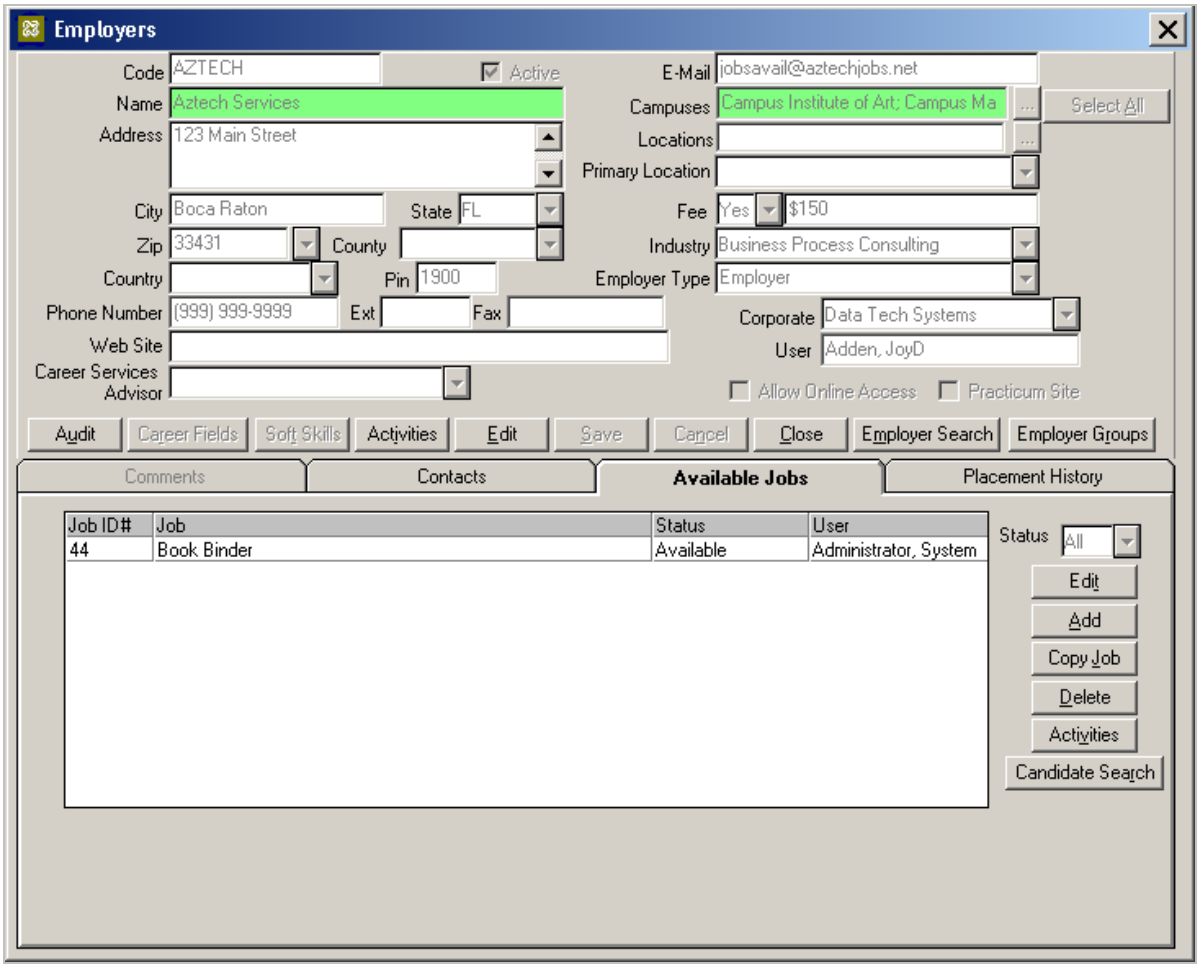


7. Enter the information that describes the available job(s). Refer to the field descriptions below for an explanation of each field.
8. Click **View Jobs** to return to the grid in the **Available Jobs** tab.
9. Click **Save Job** to save your available job listing. The program will automatically return to the grid in the **Available Jobs** tab.
10. Click **Cancel** to stop the changes.
11. Click **Email Employer Job** to send the job information to an email recipient.
12. Click **Close** to close the form.

To speed data entry when an opening, identical to one already placed occurs, use the **Copy Job** option to quickly create the new opening based on an existing job description.

To copy a job description:

1. On the **Available Jobs** tab of the **Employers** form, select the job description to be copied and click the **Copy Job** button.



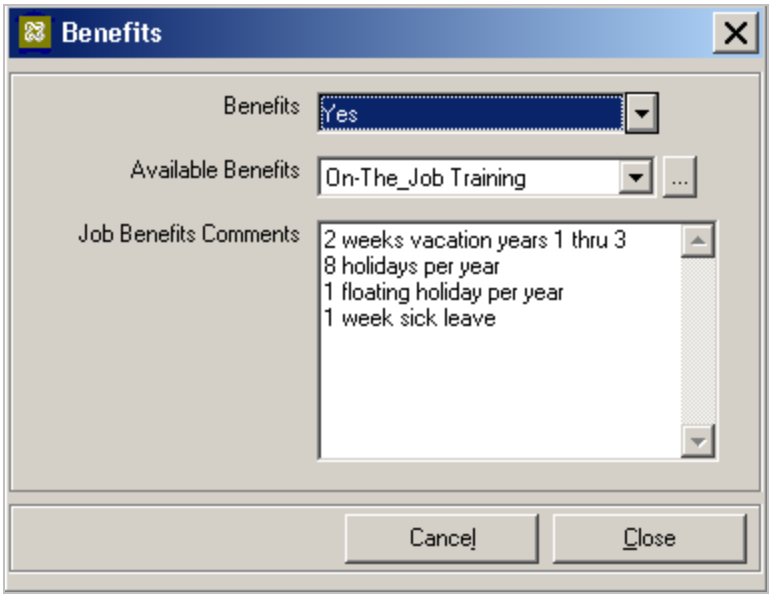
2. When the new job description is displayed, it will be named identical to the original job with a prefix of "Copy Of" appended to the name and a confirmation message will appear.
3. Click **OK** to close the confirmation message.
4. Rename the new job description as you like.

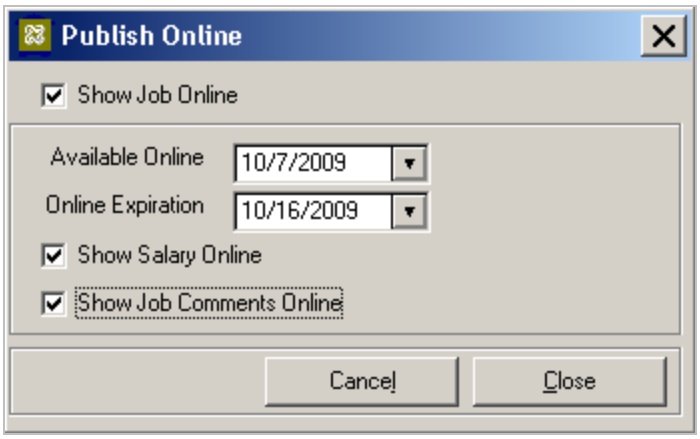
Note: The name of the job description must be unique within an employer listing.

Field Descriptions: Available Jobs Tab

Field	Description
Job Category	Select the job category from the list. Multiple selections can be associated with Job Titles. You cannot select a Job Category for a campus where you do not have authorization. After making a selection, the system will fill the Job Title drop-down list that are associated with the Job Category that is selected.
Job Title	Select a job title from the list.
Exact Job Title	Enter the exact job title.
Description	Enter a brief description of the available job.

Field	Description
Job Type	Select E-Employment or I-Internship/Externship.
Job ID	A unique number assigned to this job is displayed in this field.
Externship Type	This field does not apply to the employment job type. For the Internship/Externship job type, select "Open", "Closed", or "To Hire". • Open Externship Type: The school can place a student in the position at any time. • Closed Externship Type: The employer has placed limits on which students or when students can be placed in the position. • Hire Externship Type: The externship position can lead to future permanent employment.
Active	Select or clear the Active flag as appropriate.
Available	This field signifies when the employer will first accept applications for this job and defaults to the current date. You can modify the date, if needed.
To	Enter the date after which applications will no longer be accepted.
Pay Rate Low	If the job is hourly, enter the hourly wage in Pay Rate Low, and leave the Salary High field blank.
Salary High	If the job has a salary range, enter the low value in Pay Rate Low and the high value in Salary High.
Full/Part Time	Select full or part time as it applies to the available job.
Work Days	Enter the normal work days for the available job. This field accepts up to 7 characters which represent the days of week that the job requires. (For example: Monday through Friday would be represented by **MTWRF**.) This field's sizing needs to be constant because it is used for display in reports and in Portal. • M = Monday • T = Tuesday • W = Wednesday • R = Thursday • F = Friday • S = Saturday • U = Sunday
Work Hours	Enter the normal work hours for the available job. This is an unformatted text box.
Resume required with a job application	If a resume is required with the job application, select this check box.
Student can directly apply to the employer	If the student can apply directly to the employer, select this check box.
Contact	Select one of the previously established contacts or enter a new name. A contact can be made inactive by clearing the **Active** check box on the **Contacts** tab. Inactive contacts will no longer appear in the **Contact** drop-down list on this tab, only active contacts are listed.

Field	Description
Status	Select the status of the available job. Depending on the previous status, the list of statuses will change. Possible options can include: **Available**, **Pending**, **Filled**, **Cancelled**, **Unable to Fill**, and **Closed**. The default status is blank. You have the option of specifying the status of the job according to the required status of the field set within the data dictionary.
Fee	If your school charges a fee for placing a student in this job, select **Yes**; otherwise, select **No**.
Job Location	The **Job Location** drop-down list allows you to associate the location to each individual job. By default, the value from the **Primary Location** field is displayed as the selected location. **Note**: An audit will be maintained in the **Employer Available Jobs Audit** tab (in the **Employer Audit** form) for any changes made in this field.
Job Skills	The list includes only active skills for the selected campus. Select as many skills that apply.
Openings	Enter the number of openings (positions available).
Filled	Read-only. The program will increment this field each time a student is placed in one of the openings.
Job Source	Select the origin for this job lead from the drop-down list.
Comment	Enter a description of the available job. This description will appear on job listing reports that may be posted for the benefit of your students.
Activities	This button launches the **Activities** form.
Benefits	This button launches the **Benefits** form. Select **Yes** or **No** to indicate if the job comes with employee benefits. Select the applicable benefits from the **Available Benefits** drop-down list. Enter any comments in the **Job Benefits Comments** field. 

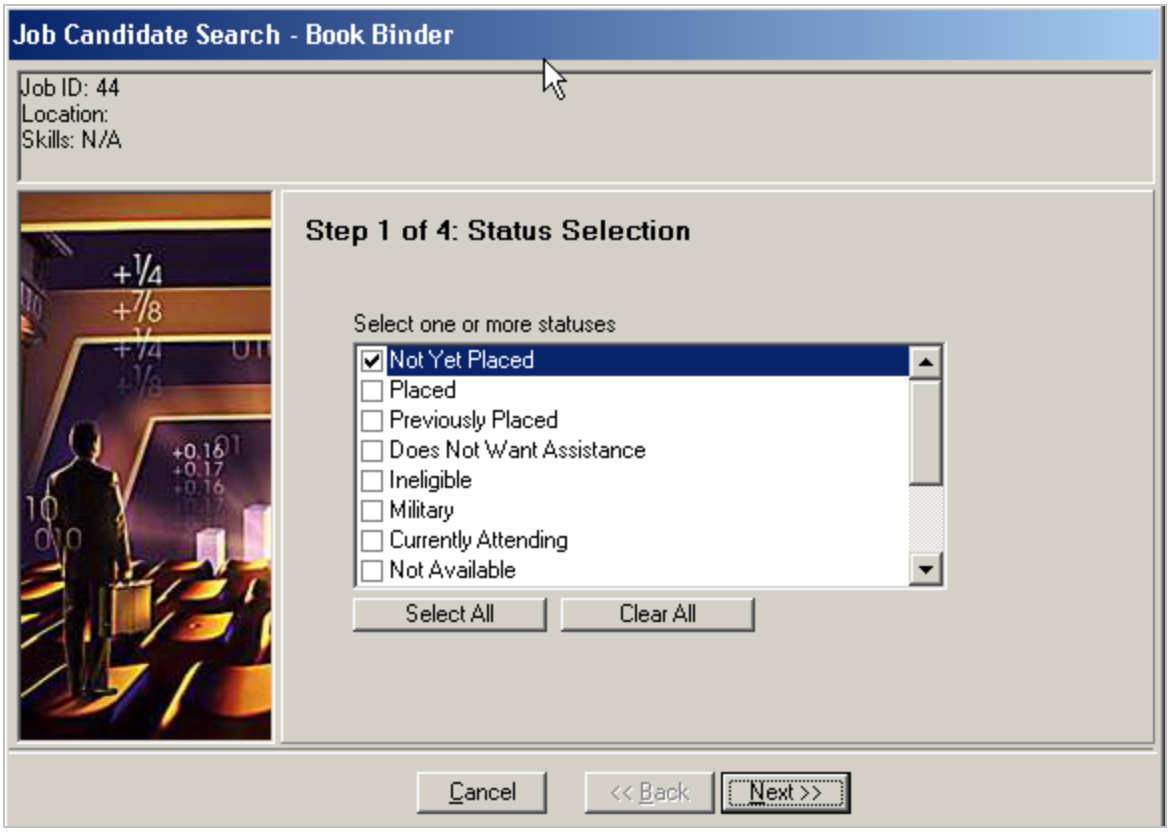
Field	Description
Publish Online	Select this check box to launch the **Publish Online** form which allows you to configure how the data is displayed online. 
View Jobs	Displays all available jobs for the selected employer. This list can be filtered by the **Status** option.
Save Job	Saves the current job information.
Cancel	Discards your changes to the job information.
Email Employer Job	Launches a wizard that allows you to email the current job details.

Job Candidate Search

The **Job Candidate Search** wizard allows you to select candidates for specific available jobs, at specific employer locations.

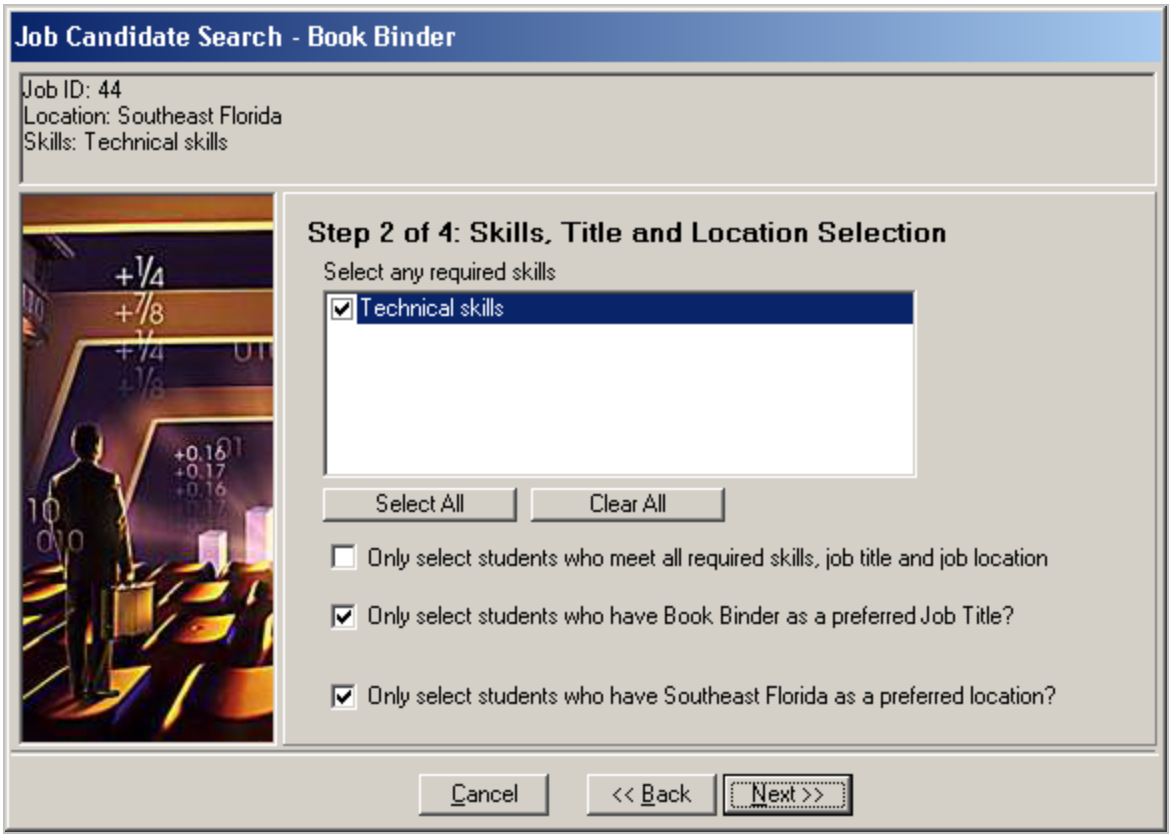
1. Navigate to **Daily** > **Career Services** > **Employers**. The Job Candidate Search wizard is displayed.
2. Click **Search** to select an employer.
3. Double-click the employer name from the grid. The Employers form is displayed.
4. On the Available Jobs tab, highlight a specific job from the grid, and click **Candidate Search**.

   Step 1 of 4 in the Job Candidate Search wizard is displayed.



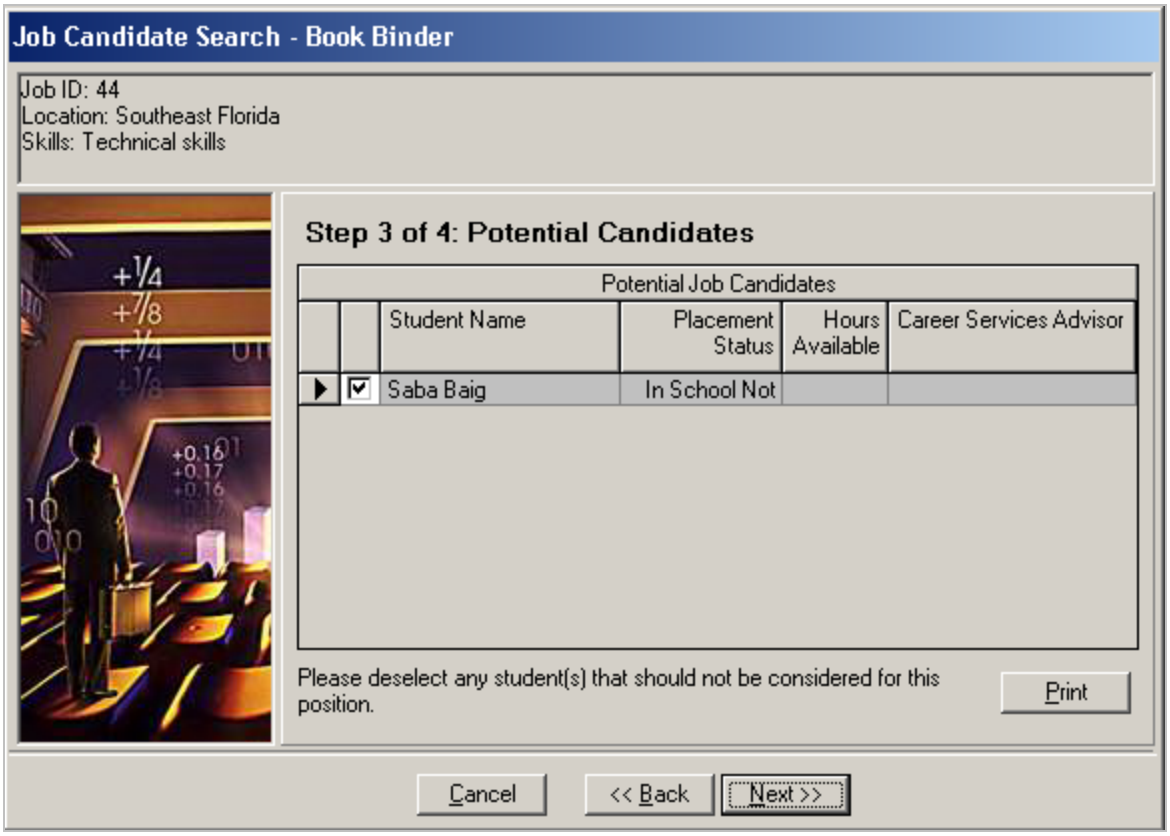
5. Select one or all listed statuses and click **Next**.

   Step 2 of 4 in the Job Candidate Search wizard is displayed.



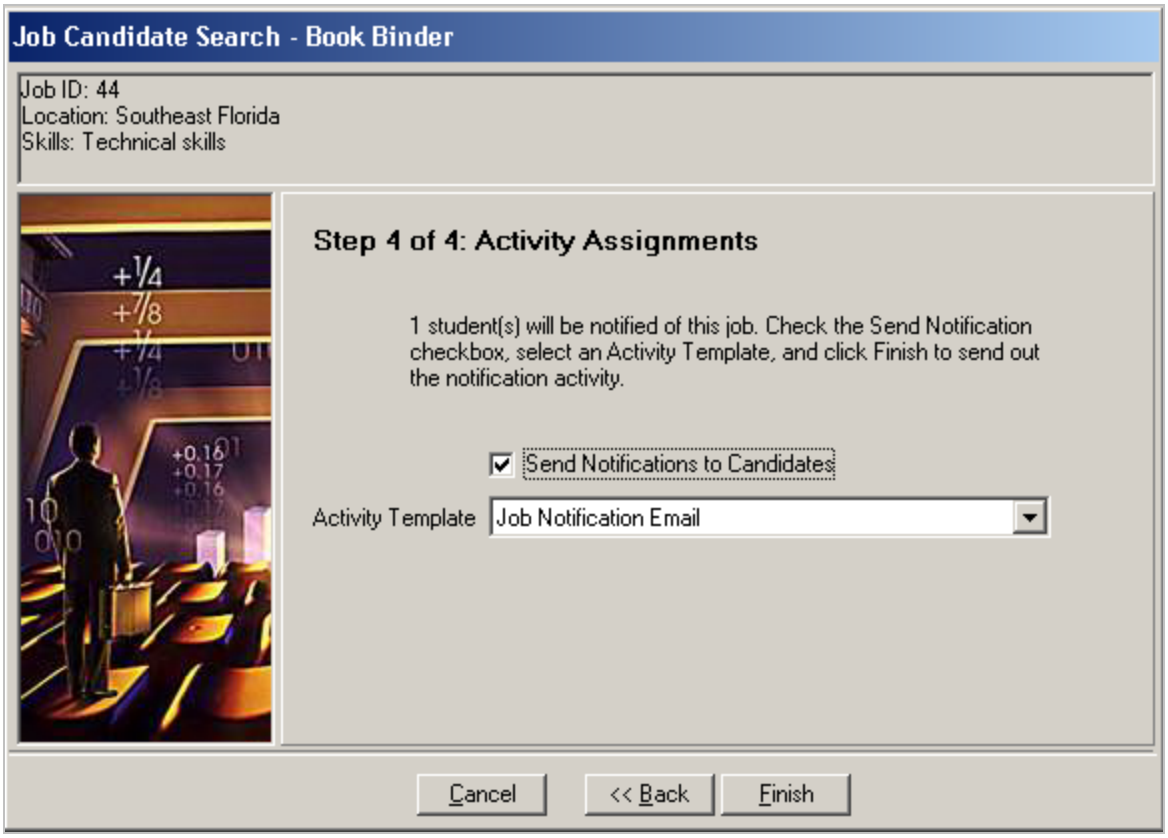
6. Select any or all required skills and click **Next**.

   Step 3 of 4 in the Job Candidate Search wizard is displayed.



7. Select or deselect potential job candidates and click **Next**.

   Step 4 of 4 in the Job Candidate Search wizard is displayed.



8. Select the **Send Notifications to Candidates** check box, select an **Activity Template** from the drop-down list, and click **Finish** to send the notification activity.
9. Click **OK** on the Job Notifications message that indicates the notification activity was sent.

Employer Letters Overview

Many procedures during your daily Career Services department operations require that you send letters to one or more employers. You can establish form letters into which you can merge data from the employer records.

Letter generation begins in the **Contact Manager > Lists** menu. From here, you can add, edit, delete, disable, and print employer letter activities. Refer to Activities for more details.

Once an employer letter activity has been added to the Contact Manager List, you use the Daily > Career Services menu to write the new form letter or edit an existing one. You can then schedule the letter to be sent to a student or a group of students.

To edit and print letters navigate to **Daily > Career Services > Print Employer Letters**. Click Edit Letter to edit the selected letter, Print Letters to print the selected letter. Click Clear Letters to remove the selected letter.

CampusNexus Student calls Microsoft Word to open the letter document.

Edit Employer Letters

You can edit activity letters by starting Microsoft Word from within CampusNexus Student. Before you can edit a letter, however, you must add it to the activities list in the **Contact Manager** option under the **Lists** menu.

Refer to the Activities List topic for more information on setting up a letter activity. See also Mail Merge Codes.

To edit a letter:

1. See Print Employer Letters for navigation and instructions for events that must occur before editing employer letters. The Print Letters form is displayed.
2. From the list of available letters, select the one you want to edit.
3. Click **Edit Letter**. If your employer letter is new, the program will tell you that the letter does not exist and ask if you want to open a new Word document. Click **Yes** to continue. The program will start Microsoft Word with a blank page. The letter file name is made from the code entered in the Activities setup procedure.
4. If your letter is currently on file, the program will start Microsoft Word with the employer letter file that you selected.
5. Work in the word document just as you would if you were not coming from CampusNexus Student. The most significant difference about Word when it is started from within CampusNexus Student is the addition of a control on the toolbar just above the letter. Notice the control labeled "Insert Merge Field". The Insert Merge Fields button displays a drop-down list of CampusNexus Student Employer data fields. These fields can be inserted at any point in your letter.
6. To insert a merge field in your letter, place the insertion point (cursor) at the location where the field is required. Click **Insert Merge Field** on the Word toolbar. The list of merge fields will drop-down. Slide your pointer down (or up) the list until you see the field you want. Click the field on the list and it will be inserted in the letter at the point you chose.
7. After you finish composing your employer form letter, including as many merge fields as you like, **Save** your letter in Word. Then **Exit** from the Word program. You will be returned to CampusNexus Student.
8. To set up Employer form letters, see Edit Letter.

Print Employer Letters

You can print employer letters by calling Microsoft Word from within CampusNexus Student. Before you can print a letter, however, you must add it to the activities list in the **Contact Manager** option under the **Lists** menu.

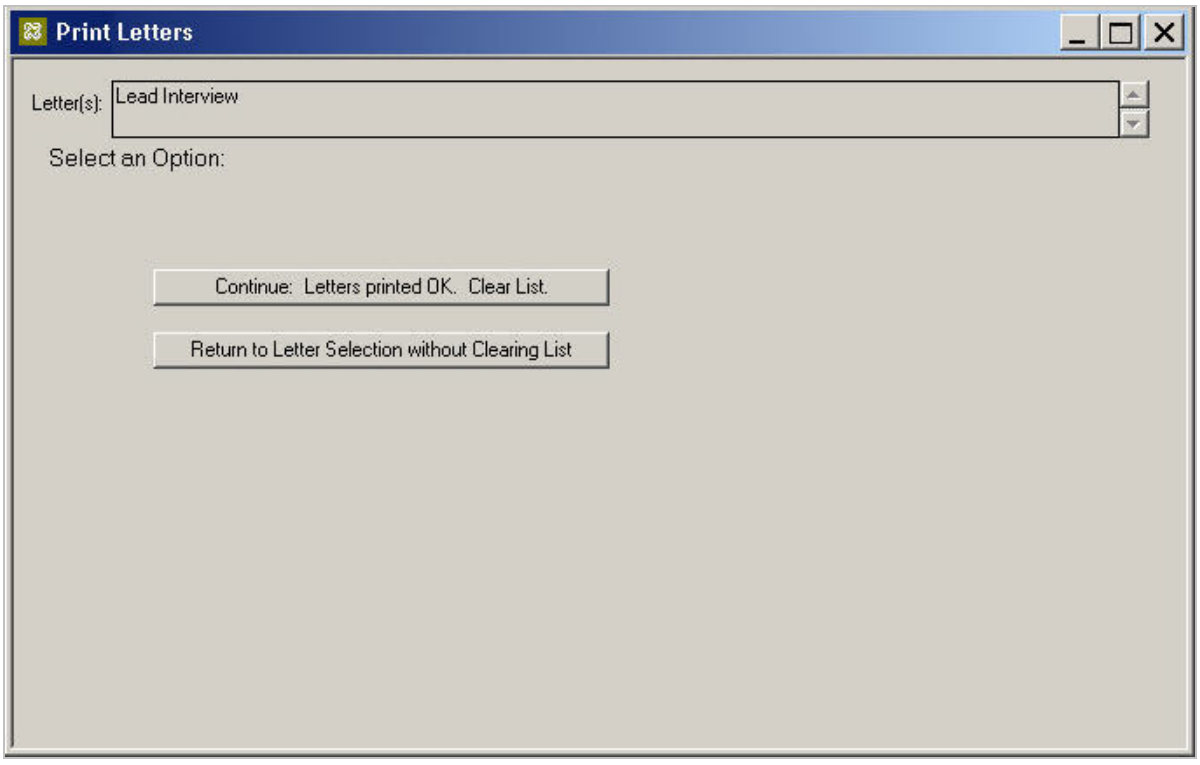
Refer to the Activities List topic for more information on setting up a letter activity. You must also write the form letter using the Edit Employer Letter option.

See Edit Letter, Clear Letter, Print Letter, Print Letter Overview, and Employer Letters Overview for additional information.

To print a letter:

1. Navigate to **Daily** > **Career Services** > **Print Employer Letters**. The Print Letters form is displayed. Only letters that are marked as Send to Employer are listed.
2. From the list of available letters, select one or more letters to print.
3. Click **Print Letters**. Microsoft Word displays your selected letters one after the other.
4. Check the letters and use the Microsoft Word print function to print the letters.
5. When you have finished printing, close the letters. Microsoft Word prompts you to save any changes you may have made (these are the merged letter files). Select **Yes** or **No**.

   Note: Microsoft Word may prompt you with a message asking if you want to replace the Normal.dot template file. Select **No** if you use a different Normal.dot template file than CampusNexus Student does.
6. You are returned to the Print Letters form. At the top of the form, a list of the **Letter(s)** that were selected to be printed is displayed, separated by semicolons.



7. Select **Continue: Letters Printed OK. Clear List.** if you want different employers to receive this letter the next

time it is printed);

- OR -

Select **Return to Letter Selection without Clearing List** if you want the same employers to get this letter the next time it is printed.

8. The Print Employer Letters process is completed after selecting an option, and you will be returned to the Print Letters form.

Update Placement Status / Advisors

CampusNexus Student enables you to perform batch status changes on students' placement status and/or change the advisors to which these students are assigned. If a student already has an assigned advisor on file, you can overwrite that assignment with this feature.

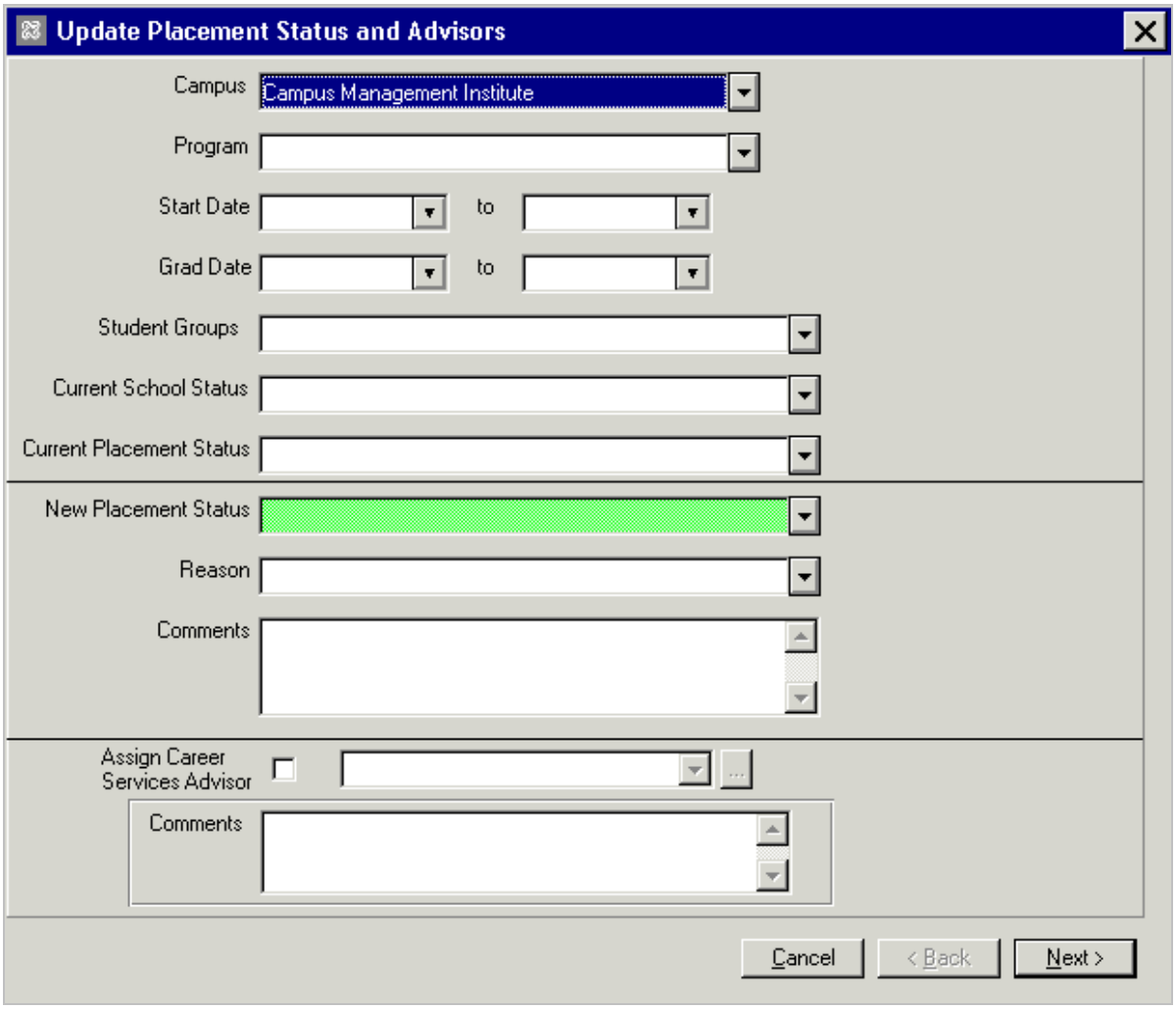
You can assign students to advisors automatically based upon their current status or placement **and** assign advisors, or just perform the batch placement status change.

Criteria for student placement include:

- Program
- Start Date range
- Graduation Date range
- Student Group
- Student Current Status
- Student Placement Status

To perform a batch status change to students' placement status:

1. Navigate to **Daily > Career Services > Update Placement Status/Advisors**. The Update Placement Status and Advisors form is displayed.



Select or enter information as required:

- **Campus** - Select the campus to which this process applies.
- **Program** - Select the course of study, which must be the same for all students in this group.
- **Start Date** - Select the date from the drop-down list when the change takes effect.
- **to:** - Select the date from the drop-down list when the change ends.
- **Grad Date** - Select the first date of the graduation date range from the drop-down list when graduation is expected.
- **to:** - Select the last date of the graduation date range from the drop-down list when the graduation is expected.
- **Student Groups** - Select the group to which the student belongs.
- **Current School Status** - Select Active, LOA, Being Processed, Drop, etc.
- **Current Placement Status** - Select Placed, Ineligible, Not Yet Placed, Waiver, etc.
- **New Placement Status** - Select Placed, Ineligible, Not Yet Placed, Waiver, etc.
- **Assign Career Services Advisor** - Select this check box to assign an advisor to this group. Remember, if an advisor has already been assigned to any of the students in this group, this procedure will overwrite the existing advisor assignment.

  Reassigning Activities

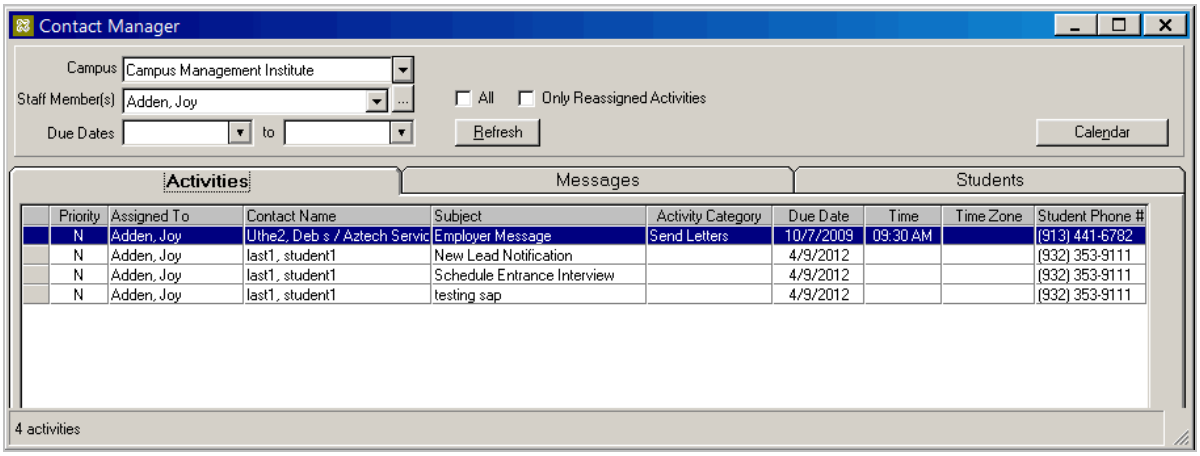
  When activities are reassigned from one staff member to another, the new staff member receives the message **Activities have been reassigned to you. Would you like to view them now?** The message is displayed the next time the staff member logs on to CampusNexus Student. The message is displayed only once.

  When activities are reassigned to multiple staff members, the message is displayed once to all members with the reassigned activities when they log on to the system. This is also true for multiple activities being reassigned to the same staff member – only one notification message is sent.

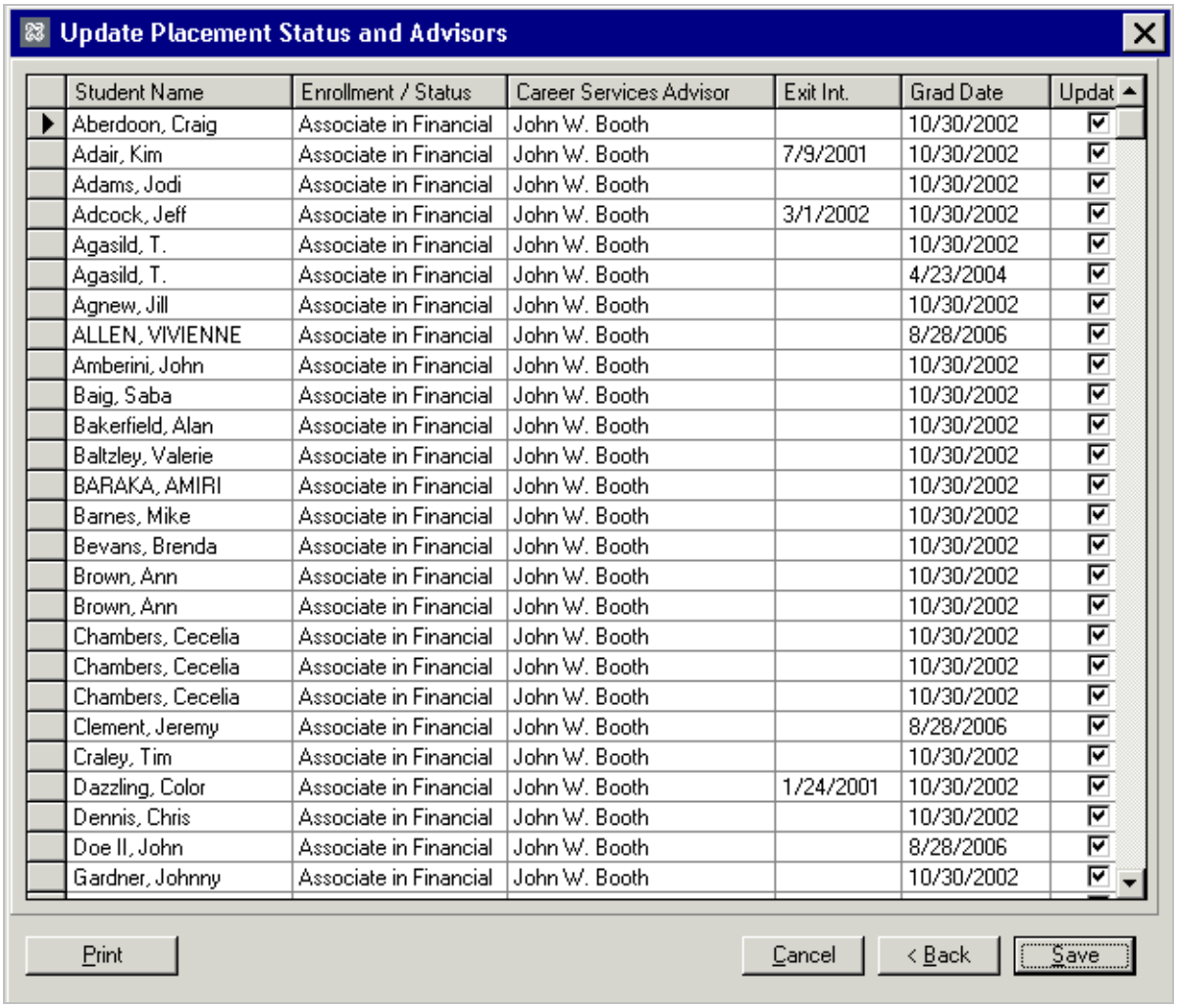
  If the staff member is logged on to the system and activities are assigned and the staff member sees the activities without logging off, then the message is be displayed the next time the staff member logs on to CampusNexus Student. If no activities reassigned to the staff member, the message is not displayed.

  When the notification message is presented, the staff member can view the newly assigned activities. If the staff member decides not to view the reassigned activities and clicks **No** on the notification message, Contact Manager displays *all* the activities listed.

  Note: By default, the **Only Reassigned Activities** check box is cleared. When selected, the check box is displayed only when the staff member selects the Activities tab. On the Activities tab, a new column **Reassigned Date** has been added.



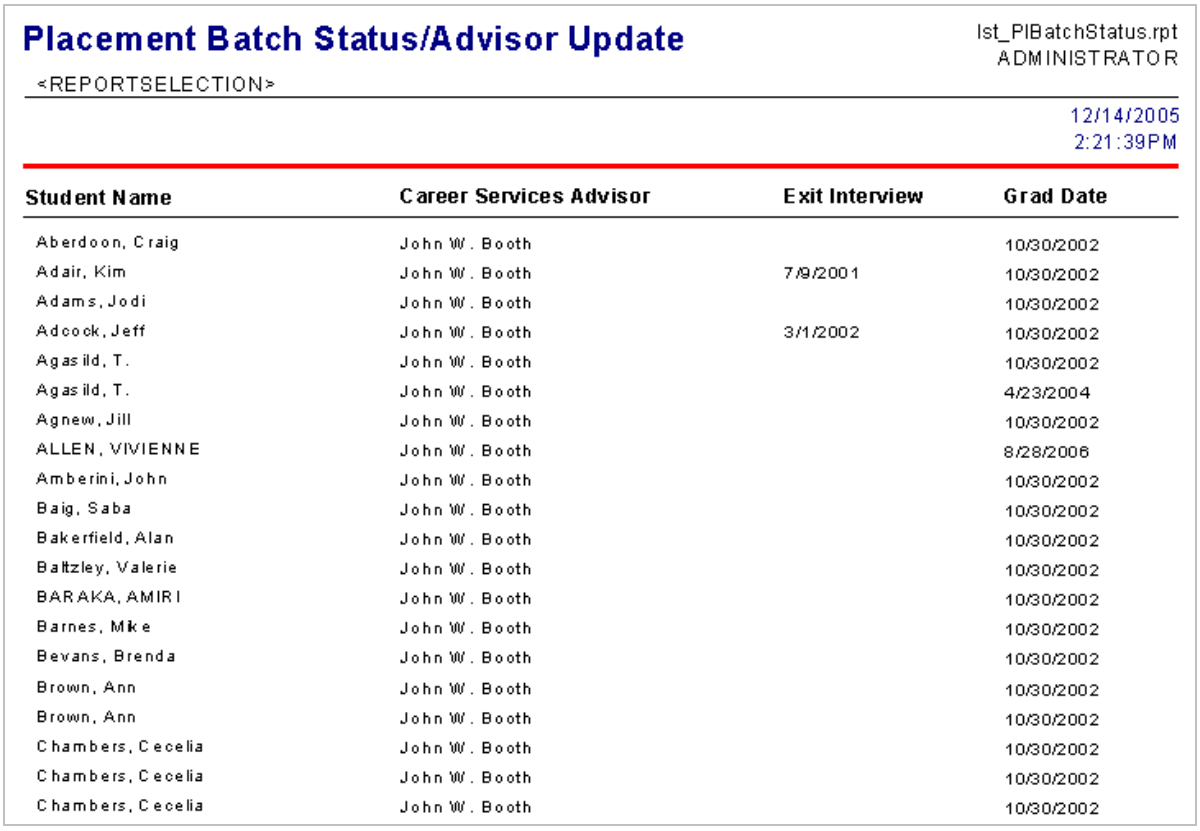
If you select the **Assign Career Services Advisor** check box, an Advisor field is displayed. Use the **Browse** button to the right of the field to select an advisor. Click **Next** to see a list of all students in this group assigned to this advisor.



2. To disassociate an individual student from this advisor, clear the **Update** check box.
3. Click **Save** to keep your changes. A verification message indicates the number of records that were updated and

prompts you to continue.

4. Select **Yes** to continue or select **No** to stop the process. If you select **Yes**, a verification message indicates that all statuses and placements were updated.
5. Click **Finish** to close the form.
6. Click **Print** to generate a Placement Batch Status/Advisor Update report listing all students assigned to this advisor and their statuses.



Placement Batch Status/Advisor Update

lst_PlBatchStatus.rpt
ADMINISTRATOR

<REPORTSELECTION>

12/14/2005
2:21:39PM

Student Name	Career Services Advisor	Exit Interview	Grad Date
Aberdoon, Craig	John W. Booth		10/30/2002
Adair, Kim	John W. Booth	7/9/2001	10/30/2002
Adams, Jodi	John W. Booth		10/30/2002
Adcock, Jeff	John W. Booth	3/1/2002	10/30/2002
Agasild, T.	John W. Booth		10/30/2002
Agasild, T.	John W. Booth		4/23/2004
Agnew, Jill	John W. Booth		10/30/2002
ALLEN, VIVIENNE	John W. Booth		8/28/2006
Amberini, John	John W. Booth		10/30/2002
Baig, Saba	John W. Booth		10/30/2002
Bakerfield, Alan	John W. Booth		10/30/2002
Baltzley, Valerie	John W. Booth		10/30/2002
BARAKA, AMIRI	John W. Booth		10/30/2002
Barnes, Mike	John W. Booth		10/30/2002
Bevans, Brenda	John W. Booth		10/30/2002
Brown, Ann	John W. Booth		10/30/2002
Brown, Ann	John W. Booth		10/30/2002
Chambers, Cecelia	John W. Booth		10/30/2002
Chambers, Cecelia	John W. Booth		10/30/2002
Chambers, Cecelia	John W. Booth		10/30/2002

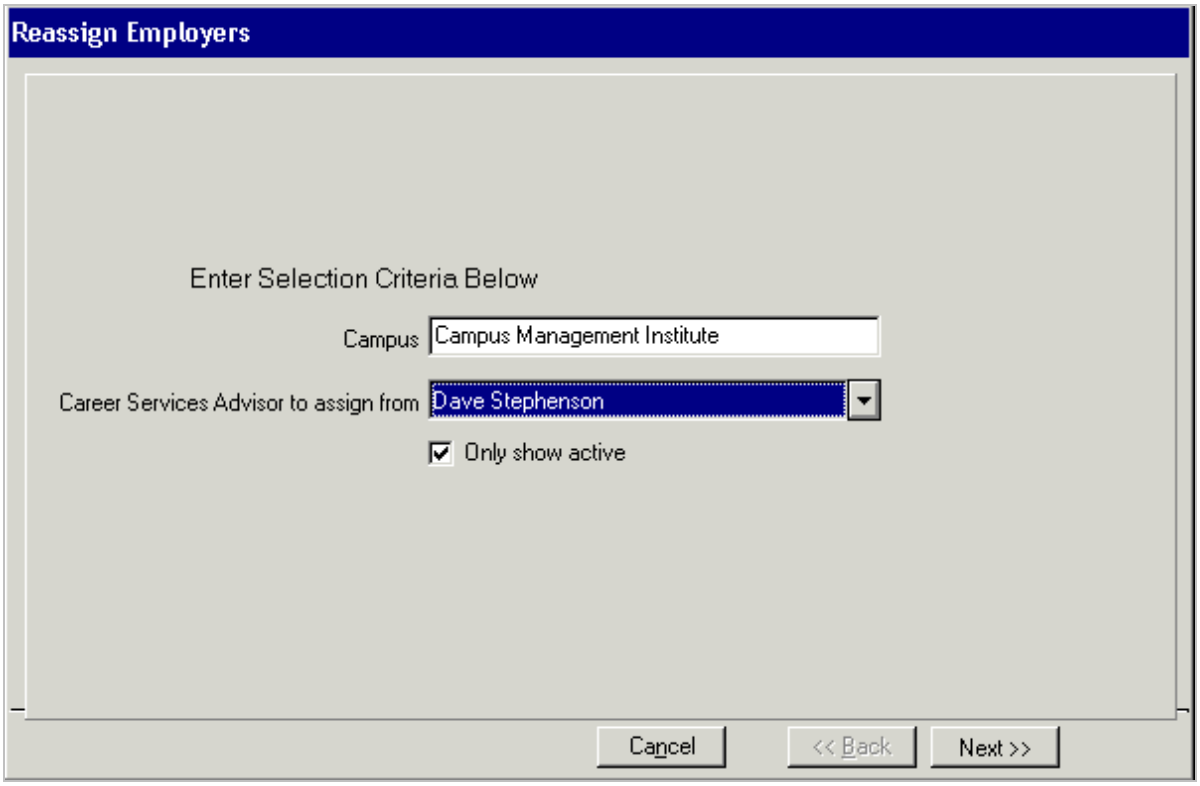
For more details on the Placement Batch Status/Advisor Update report, see the Placement Training Guide.

Reassign Employers

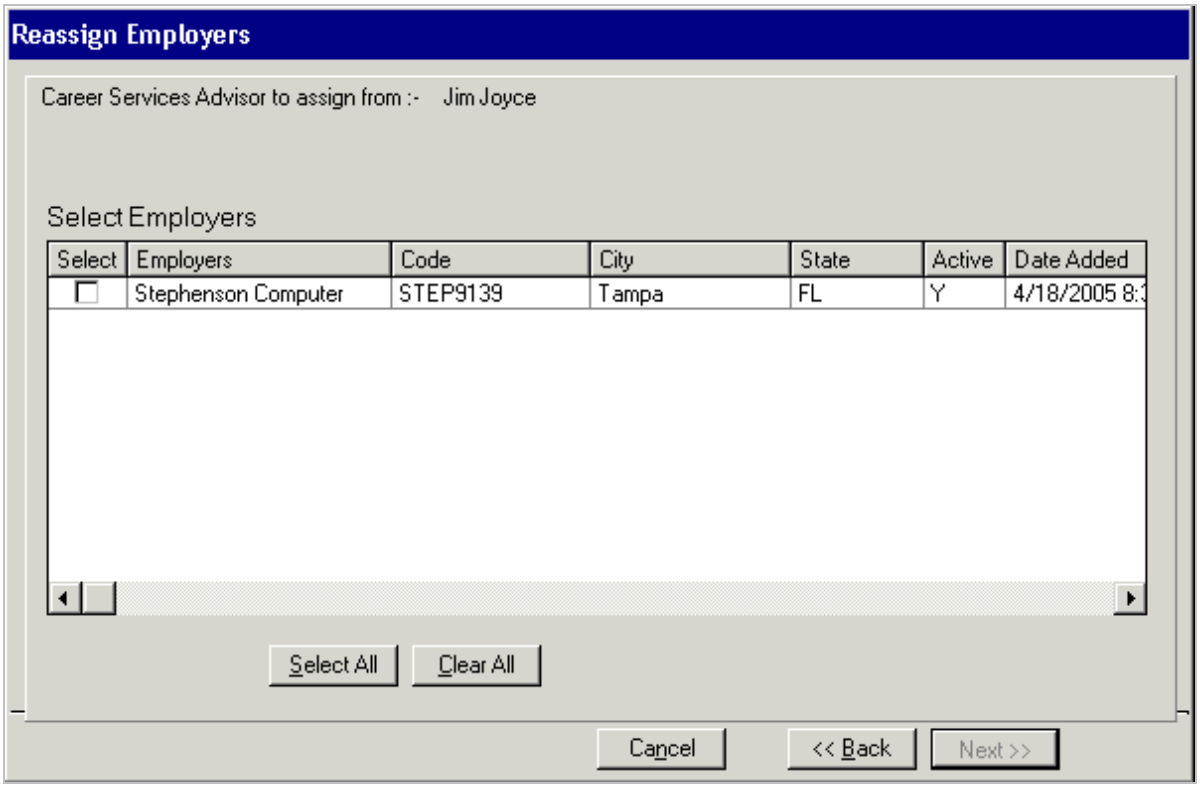
When staff changes, it may be necessary to reassign employers from one Career Services Advisor to one or more other advisors. A wizard enables you to reassign employers.

To reassign employers from one advisor to one or more other advisors:

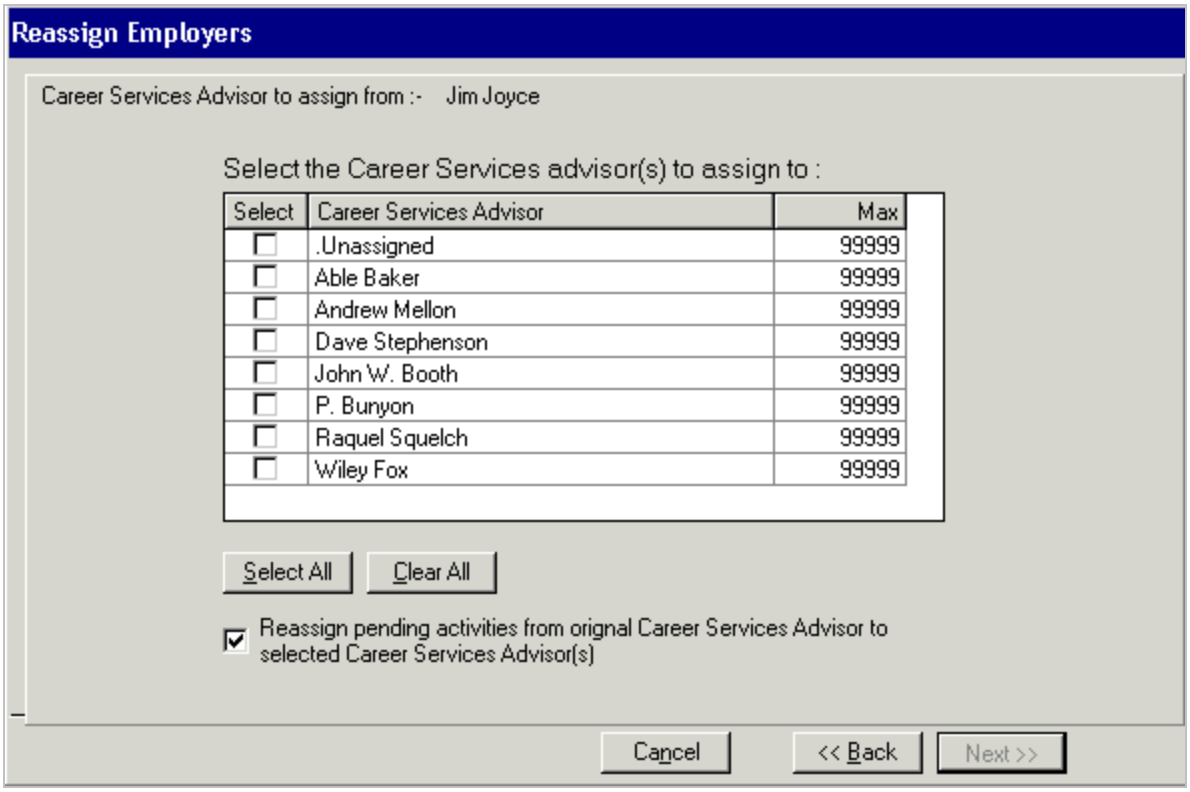
1. Navigate to **Daily > Career Services > Reassign Employers**. The first page of the Reassign Employers wizard is displayed.



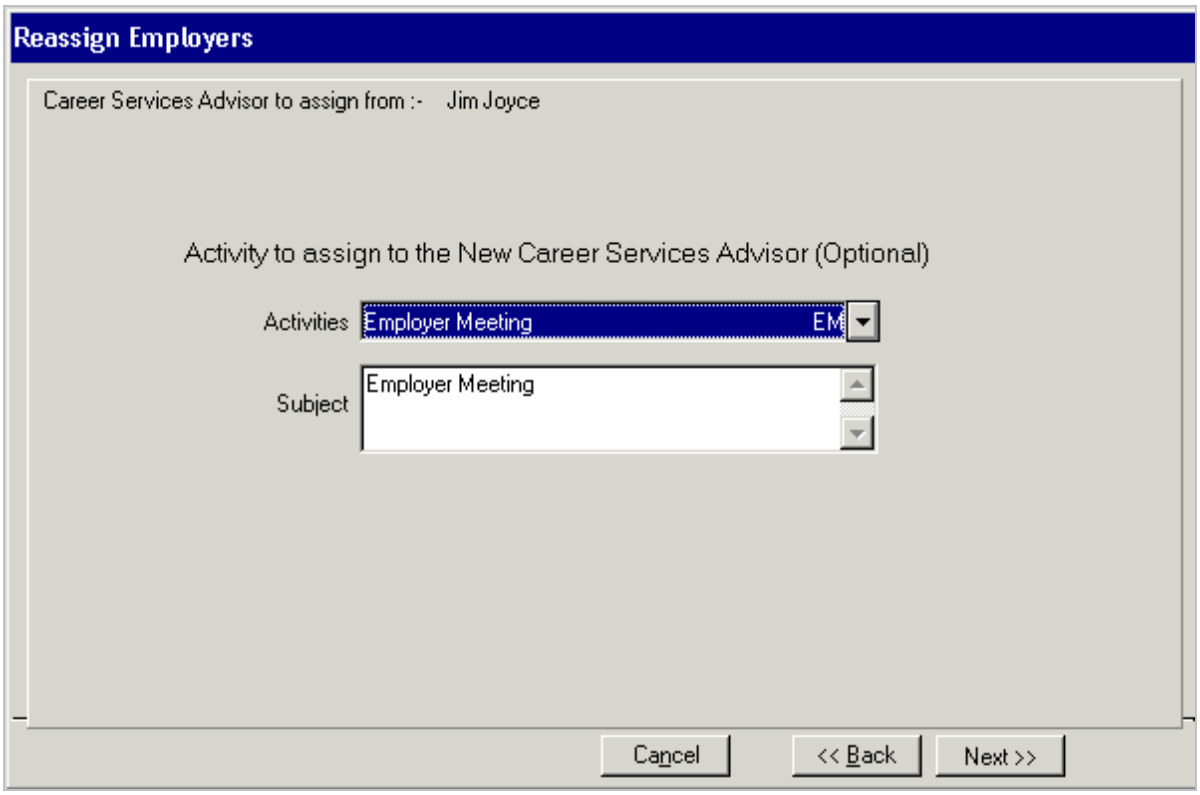
2. Select the campus where the reassignment will occur from the **Campus** field.
3. Select the Career Services Advisor whose employers are being reassigned. You can filter the drop-down list of advisors to show only active advisors by using the **Only show active** check box.
4. Click **Next** to proceed.



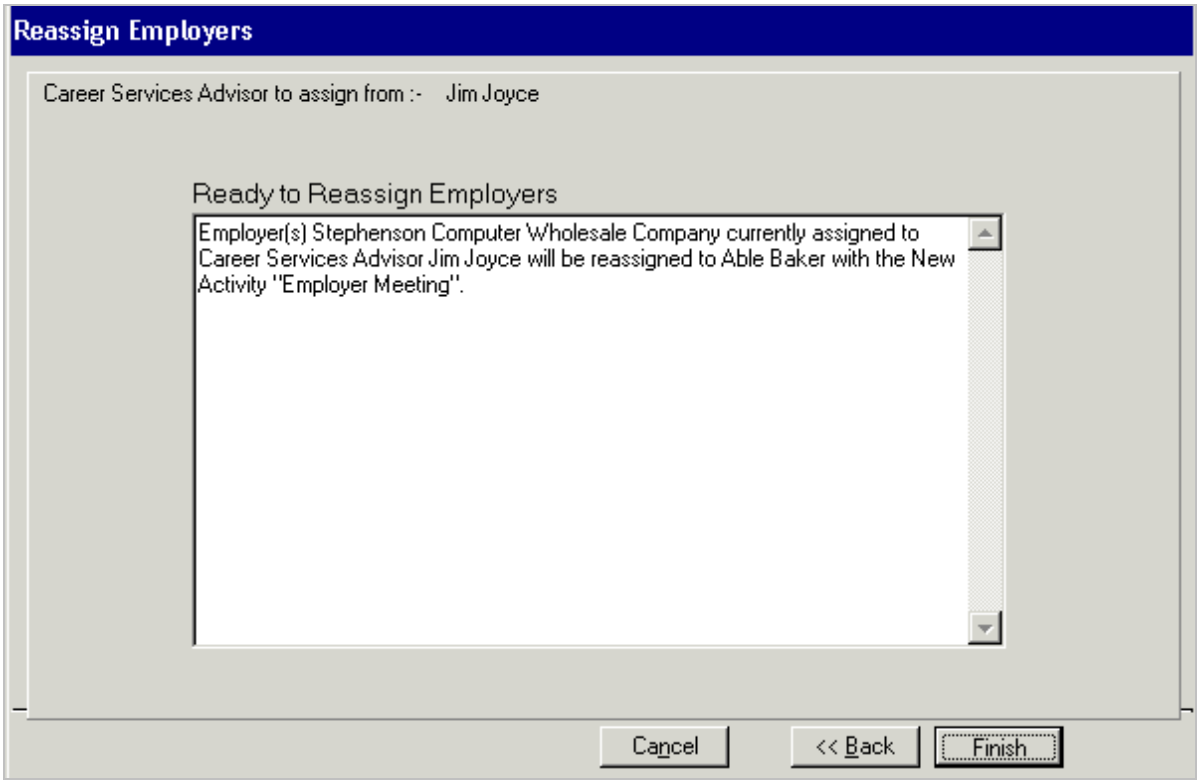
5. When the list of employers is displayed, use the **Select** box to select the employers to be reassigned.
6. Click **Next** to proceed.



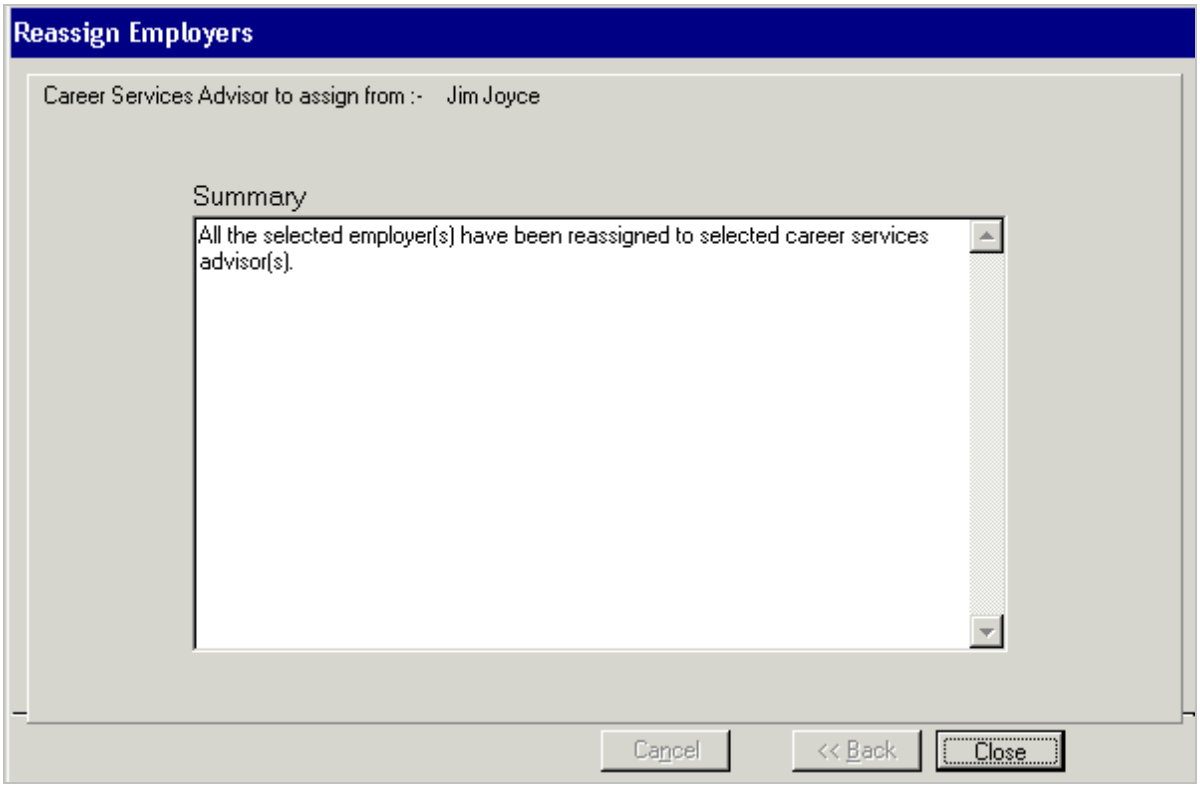
7. Select the advisor who will be assigned the employers selected in the previous step. If there are multiple employers, select multiple advisors and distribute the employers among the new advisors using the **Max** field.
8. If any pending activities from the original Career Services Advisor are to be reassigned to the new advisor(s), select the check box at the bottom of the form.
9. Click **Next** to proceed.



10. Select which activity will be reassigned to the new advisor(s).
11. Click **Next** to proceed.



12. A message is displayed describing the selections you have made using the wizard.
    - If the selections are correct, click **Finish**. A "Processing..." message is displayed.
    - Click **Back** to return to the form where you need to make a change, and continue as before.
13. The final step of the wizard displays a confirmation message. Click **Close** to close the form.


Reassign Employers
Career Services Advisor to assign from :- Jim Joyce
Summary
All the selected employer(s) have been reassigned to selected career services advisor(s).
Cancel
<< Back
Close

Process Online Employers

Employers can register and create a profile online via the Employer Signup Page of Portal. It is the responsibility of authorized school staff to view employer records submitted online, identify possible duplicate records, and approve or reject any record. Staff must also verify via a school-defined process that campus assignment to employers meets the school's business practices.

Note: Before employers can be processed online, the Employer Code Option, Employer Code Format and Enable Duplicate Employer Check must be configured in the Placement Settings form (**Setup > Career Services > Settings tab**).

Employer Registration

Employers register as follows:

1. The employer navigates to the Employer Signup Page of Portal. The system displays a form in which the employer enters all required data and submits the form.
2. If all required information was supplied, the employer receives a confirmation indicating that the form was transmitted to the school. Otherwise, the employer is prompted to provide information in all required fields.
3. Employers are saved to a temporary employer table in CampusNexus Student with the default campus configured at the URL

Employer Processing

To add a new employer:

1. Navigate to **Daily > Career Services > Process Online Employers**. The Process Employers form is displayed.
2. If there are duplicate employer records, the system displays the warning: "The system found duplicate records among your selected employers. Please select OK to process duplicates and resolve all irregularities before proceeding."

   You must resolve any duplicate employer registrations before proceeding. Click **OK** to do so. The Process Duplicate Employees form is displayed. All duplicate records are displayed in the grid in the top of the form

   a. Select a record and choose one of the following options:

      - Select **Discard Duplicate Employer** to remove the record.
      - Select **Create New Employer Record** to let the duplicate remain in the system.

        Note: If an employer has multiple locations, the system could read this as a duplicate, even though it is not. In this case, select Create New Employer Record.
      - If the duplicate record is associated with a campus to which you do not have access, select **Request for Record Change**. If you choose this option, you must assign a Contact Manager activity - an Employer Email- to a staff member requesting the record change. Type a message to the staff member in the Message field.

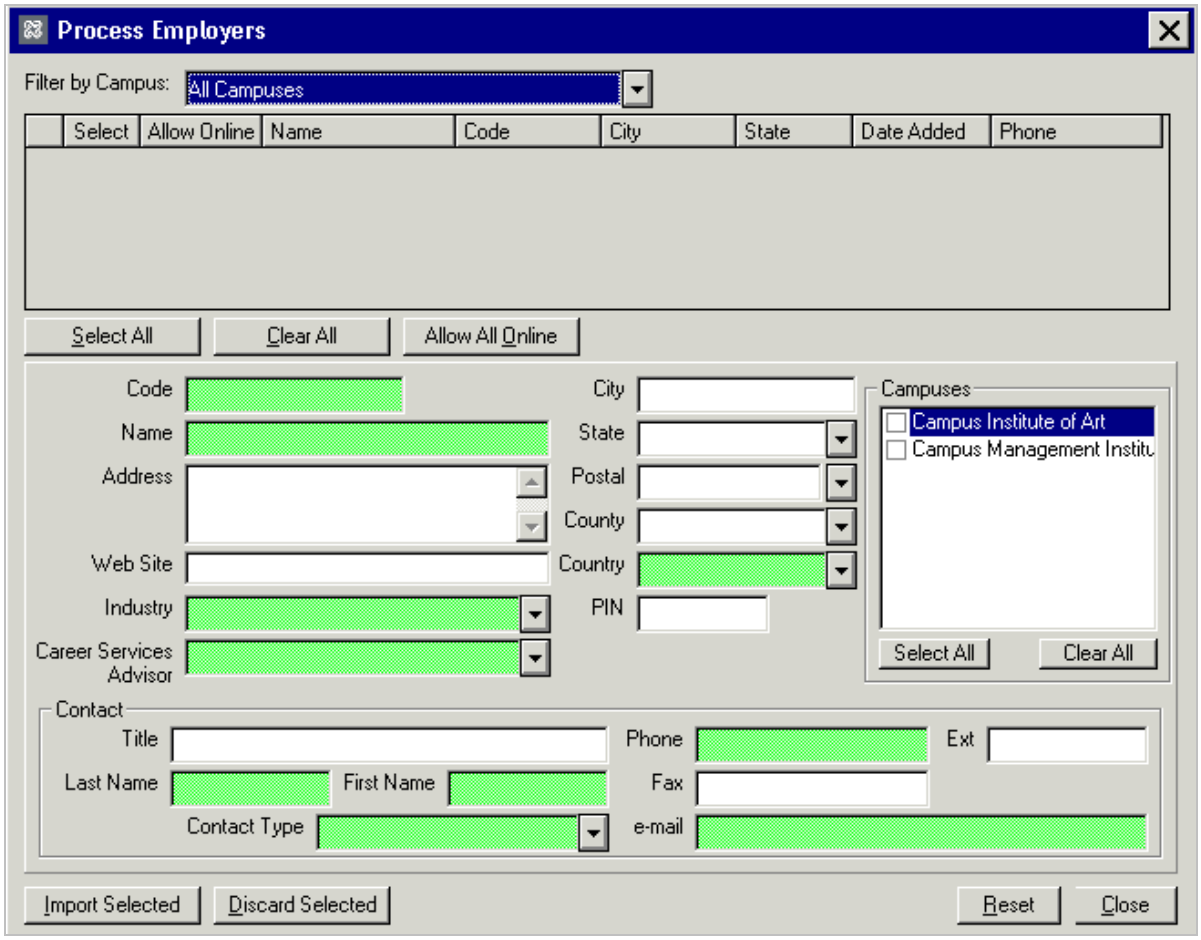
   For speed and ease of use, you can use the button **Discard All Duplicates** to remove redundant records from the queue.

   b. Select/clear the check boxes in the Campuses field to indicate the campuses to which you want to associate this employer. For speed and ease of use, you can use the buttons to **Select All** or **Clear All**, if

appropriate.

c. Click **Process** to save your changes.

3. If there are no duplicates in the queue, the system displays the **Process Employers** form.



Work with the fields on the Process Employers form as appropriate:

- **Campus**: Select the allowable campus based on security. For multiple campuses, use the check boxes in the Campuses field.
- **Select**: Select the employer with which you want to work.
- **Select All**, **Clear All**, **Allow All Online**: Use these buttons to perform the same action on all employers in the queue.
- **Allow Online**: Imports and processes employer. Employer is immediately accessible online. Typically, schools import employers and review during a school-defined grace period prior to granting online access.
- **Code**: The system assigns a code to each employer who registers online. This is a read-only field.
- All other employer information fields (Name, Address, website, and so on) are populated with information from the Employer Sign up page. These fields are editable by authorized staff users.
- **Career Services Advisor**: Use the drop-down list to assign a staff member to this employer.

- **PIN**:The personal identification assigned to the employer.
- **Campuses**:Select campuses to associate with this employer. Use **Clear All** and **Select All** if appropriate.
- **Import Selected**:Click to add the employers selected in the grid to add them to the CampusNexus Student database.
- **Discard Selected**: Click to remove from the system the employers selected in the grid.
- **Reset**: Click to undo any changes you have made since opening this form.
- **Close**: Click to exit this form after you have imported/edited and discarded employers, as required.

4. Following the successful online processing of an employer, users can select an option to grant online access to the employer. The system will generate a Contact Manager activity; an email to the new employer which will include a user name and password.

Daily > Loan Management

The Daily > Loan Management submenu options are as follows:

- Document Tracking
- Status Update
- <Detach> (This options detaches the submenu.)

Document Tracking

Institutions request documents from students and persons or organizations connected with the student. Use Document Tracking to keep track of the documents that are necessary for processing student records in an orderly fashion.

Document Tracking is available in the following modules:

- Admissions - AM
- Financial Aid - FA
- Student Accounts - SA
- Academic Records - AD
- Loan Management - LM
- Career Services - PL

You can use the Daily > Document Tracking feature to look at all documents of a certain type to determine the document's status for each student.

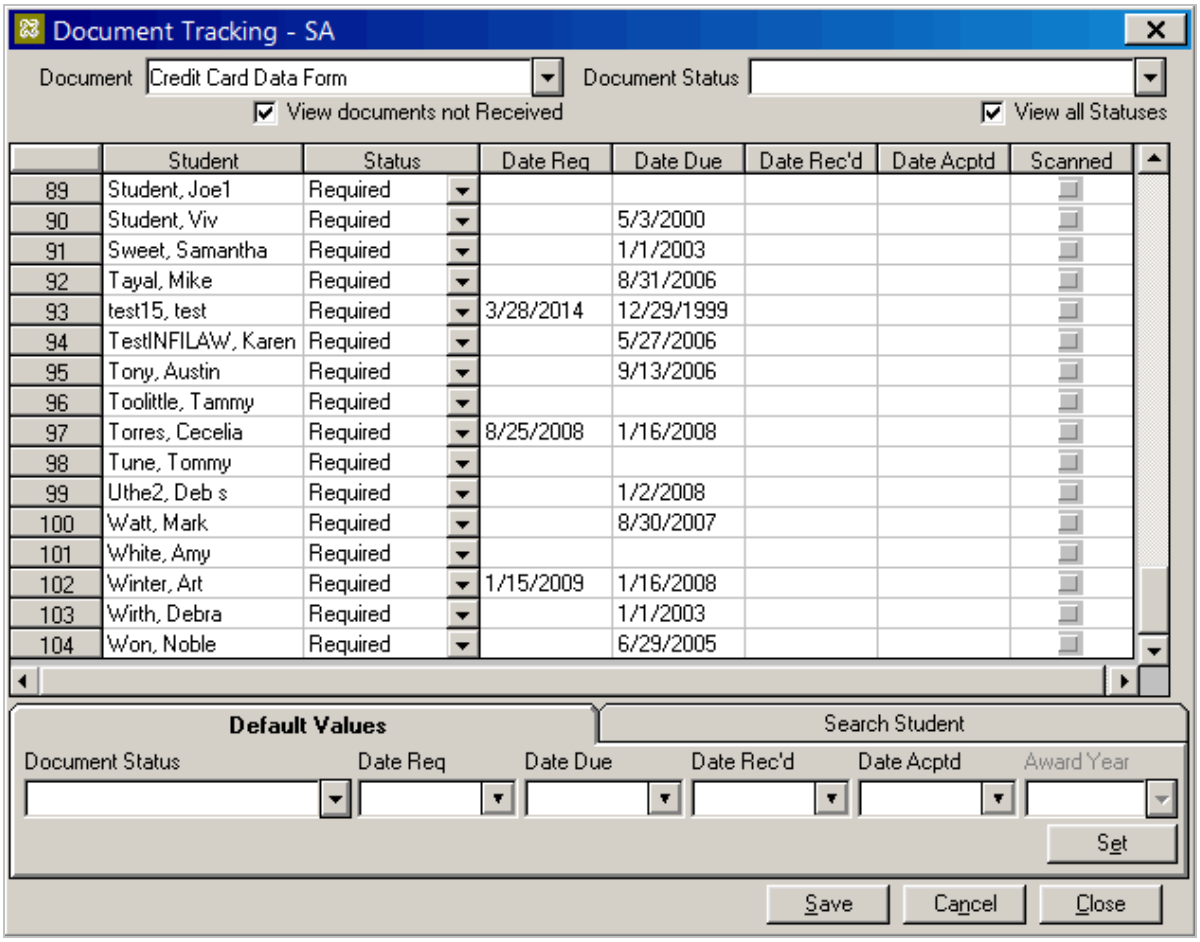
Several documents relate to academic or demographic history and your organization must have copies of them for each student. Examples are birth certificates, driver's licenses, transcripts, alien registration cards, social security cards, etc. Management policy determines which documents are important at your institution.

You can set up lists of these documents and assign them to each student record. You can then record the current status of the documents, the date you requested each document, and the date you received each document. You can also indicate that the document has been scanned into your electronic filing system.

Note: This approach differs from the Document Tracking option that you can access from the View > Contact Manager menu or Student Bar. When you access Document Tracking from the Student Bar, all documents related to a specific student as displayed. Here, you see all students related to a given document.

To edit tracking data for listed documents:

1. Navigate to **Daily > Admissions** (or other module) **> Document Tracking**. The Document Tracking form is displayed.



2. Select a **Document** from the list box at the top of the form. All students having the selected document related to their files are listed on the form.
3. Select or clear **View Documents Not Received**.
   - If the check box is selected, only those documents that have not been received are listed.
   - If the check box is cleared (default), all documents (subject to your Document Status selection) are listed.
4. For Document Tracking in Financial Aid - FA, select an **Award Year** to which the documents apply.

   Note: If you choose a Financial Aid document that does not have the "Award Year Specific" flag selected (indicating Yes) on the Document Setup, the form is displayed with the three Award Year fields disabled.
5. Select or clear **View All Statuses**.
6. Select an optional **Document Status**. If you select a document status, CampusNexus Student lists only the type of document you selected and only those that have the selected status.
7. From the displayed list, find a student document.
8. Click on a field in the row you want to update. You can update the following fields:
   - Status
   - Date Requested
   - Date Received
   - Date Due

- Date Accepted
- Scanned

Note: In date fields, you must enter the century along with the year. For example, 06/30/2000. If you just enter 99 instead of 1999, CampusNexus Student will reject it.

9. Click **Scanned**, if necessary, to indicate that you have scanned the requested document into your electronic filing system.
10. The **Default Values tab** enables you to update statuses and dates in batches.

    If you select a Status, or a Date Due, or Award year, for example, CampusNexus Student updates the values of all students whose names appear in the grid. Click **Set** to update the values and save your work.
11. The **Search Student tab** enables you to search a student using the Social Security Number (SSN) or Student ID.

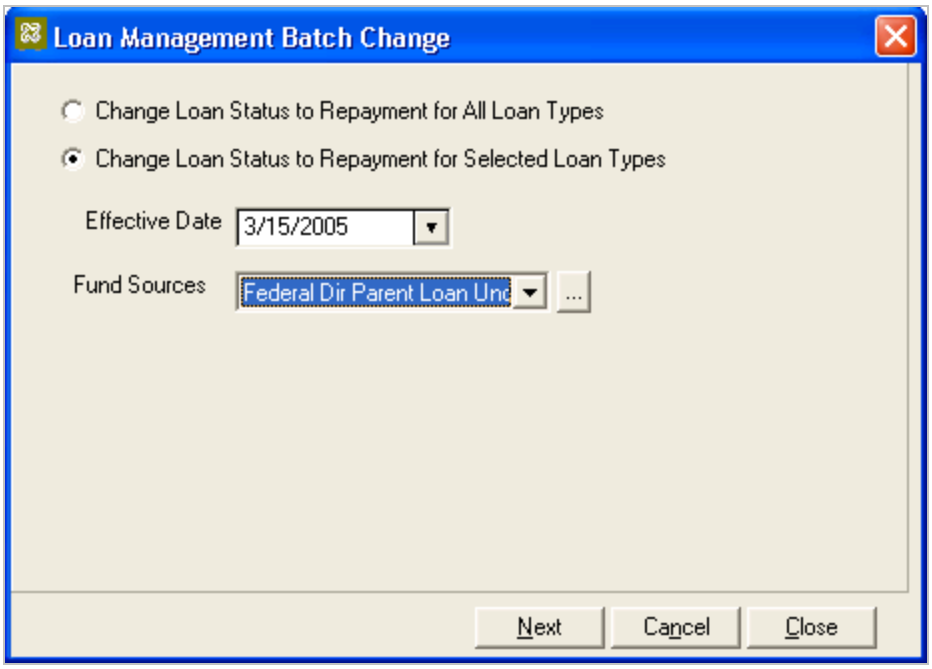
    Type the SSN or ID and click **Filter**. CampusNexus Student finds the student associated with that number and displays only that student's name and information in the grid. Click **Clear Filter** to remove the filter. The grid revert to the previous display of students.
12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Status Update

This option opens a wizard to make batch changes of the loan status to groups of loans. The wizard will list all loans with a status of Grace Period that have a repayment date on or before the date entered. The status of all loans (Students) not removed from the list will be changed to Repayment.

To run the Status Update wizard:

1. Navigate to **Daily** > **Loan Management** > **Status Update**.



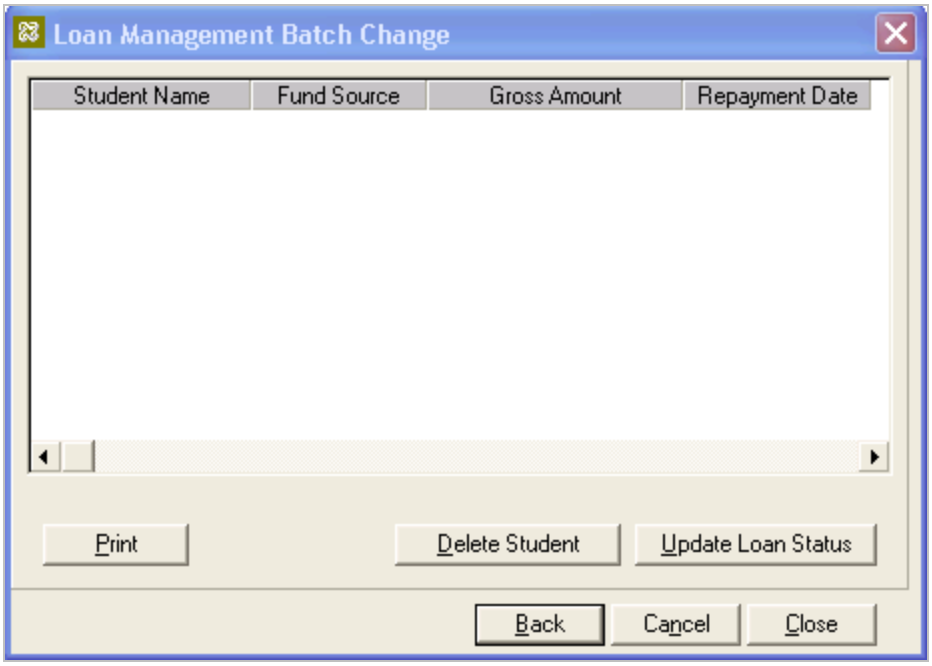
2. Select **Change Loan Status to Repayment for All Loan Types** or **Change Loan Status to Repayment for Selected Loan Types**.

   Enter an Effective Date.

   If you selected the second option above, select the Fund Sources for which to make the changes.

   Click to select more than one fund source.

3. Click **Next** to continue.



The next page of the wizard lists all loans with a status of Grace Period that have a repayment date on or before the date entered. The status of all loans (Students) not removed from the list will be changed to Repayment when you click **Update Loan Status**.

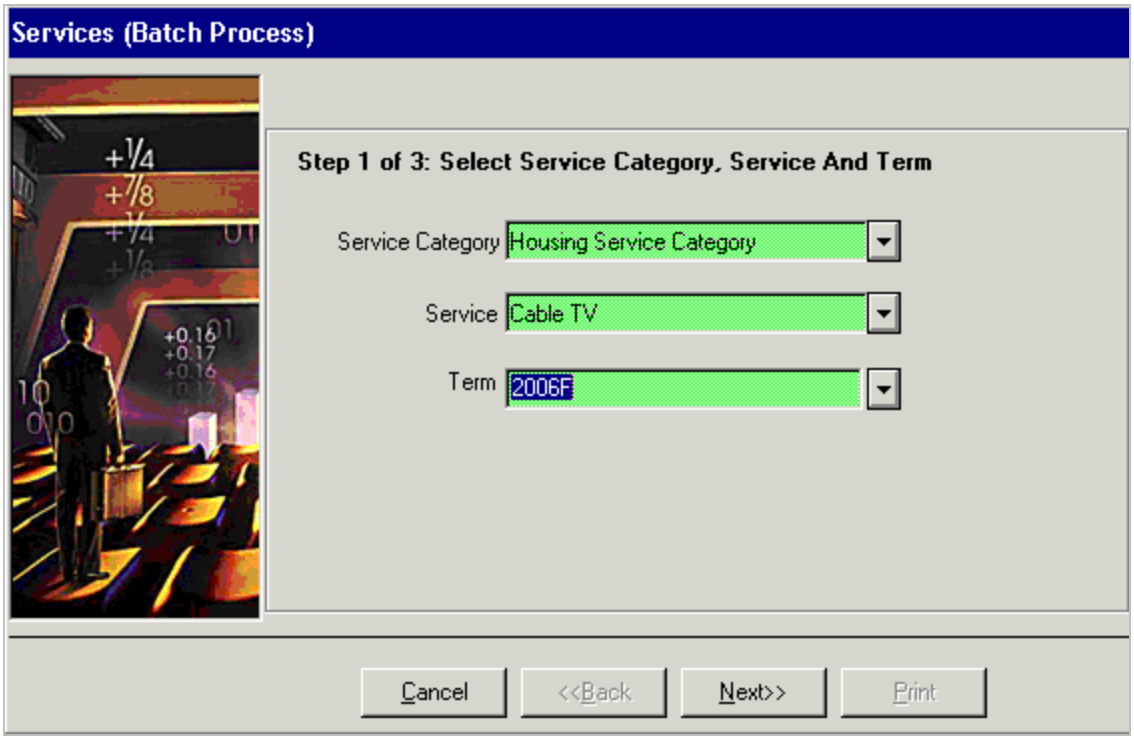
4. Select a student on the grid and click **Delete Student** to remove the record from the list to be updated.
5. Click **Update Loan Status** to continue with the update procedure. A record is added to the Loan Management Status Change history table for each loan updated in this procedure.
6. Click **Print** to print the list. The report will list the data on the grid plus the Student ID field. You can create a student group from the report.
7. When the update procedure is finished, the program will display a message "999 loans updated. OK to Print Report?" If you have not already printed a report, do so now. The **Finish** button is then enabled.
8. Click **Finish** to close the form.

Daily > Student Services > Batch Assign Services

The Batch Assign Services option provides a means of assigning a student service to a group of students selected by specifying filtering criteria. Services can be assigned to students who are members of a group, or who started within a specific date range, or many other options described below. When you complete the wizard, the specified service will be assigned to all the students you selected.

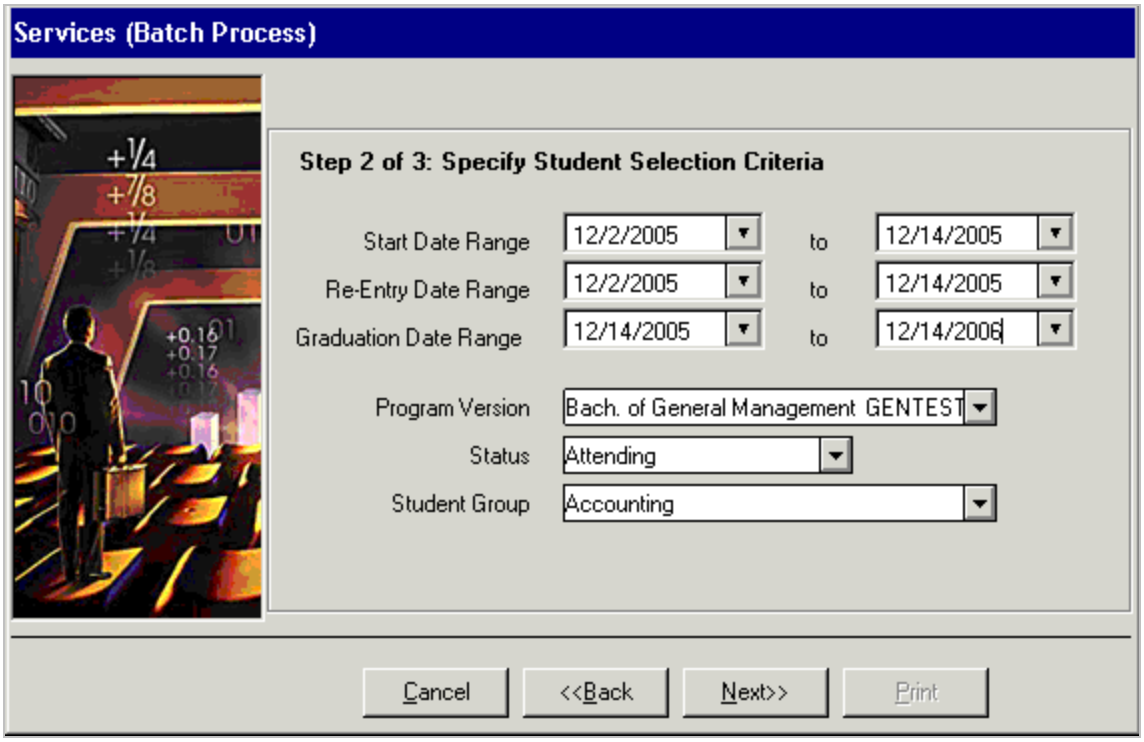
To assign services in batch mode:

1. Navigate to **Daily > Student Services > Batch Assign Services**. The Services (Batch Process) Wizard is displayed.



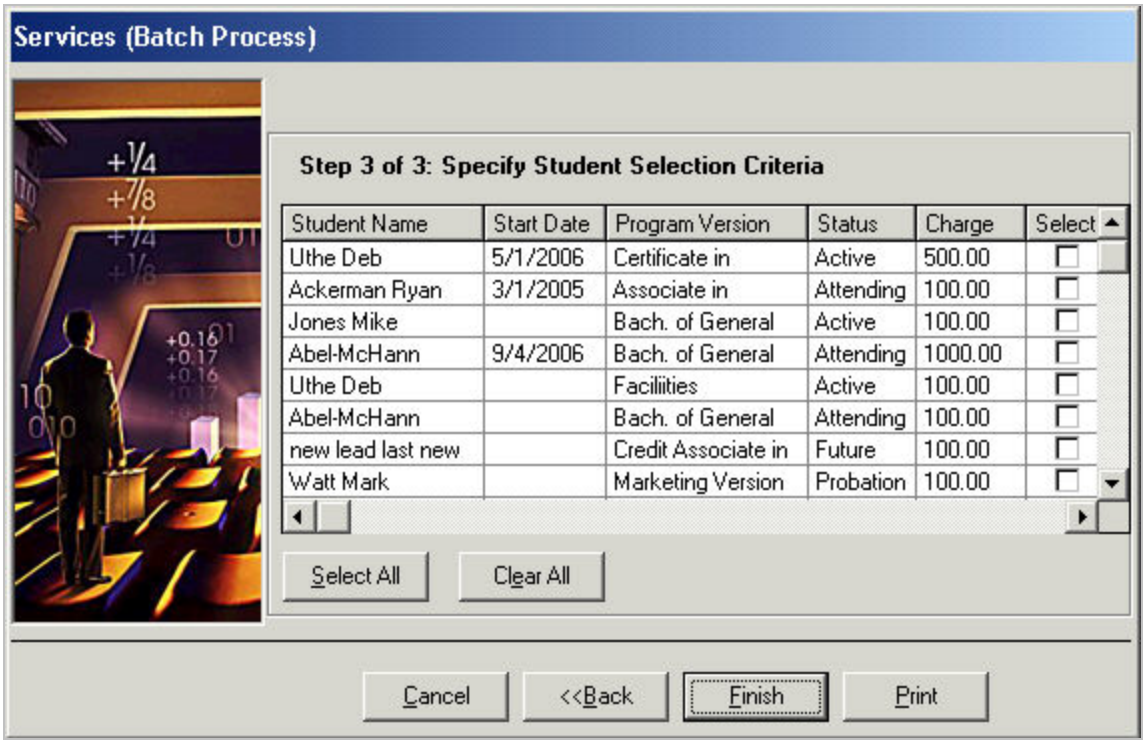
   Note: The selections that you make in the **Step 1 of 3: Select Service Category, Service, and Term** screen will be applied to the students selected in this wizard.

2. Select a **Service Category** from the drop-down list of Service Categories that have been configured.
3. Select a **Service** from the drop-down list of Services that have been configured.
4. Select a **Term** drop the drop-down list of Terms that have been configured.
5. Click **Next >>** to continue. Step 2 of 3: Specify Student Selection Criteria is displayed.

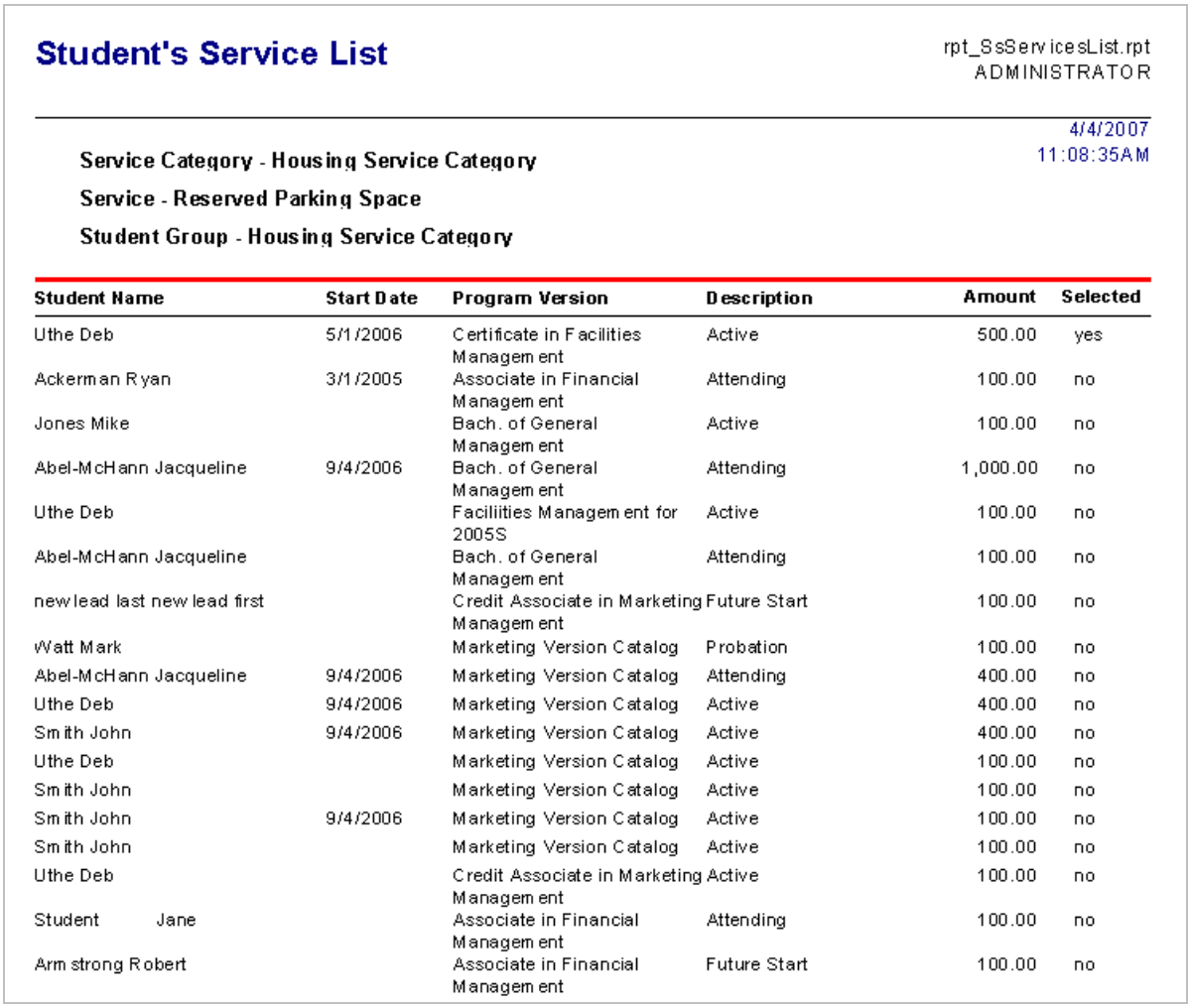


Note: If *all* selection criteria fields are left blank, then *all* students within the active campus will be included in next step of the wizard and are available for selection.

6. Optional: Select a **Start Date Range**. Only students that started within the specified date range will be included in the batch to assign services. If this field is left blank, *all* start dates are eligible.
7. Optional: Select a **Re-Entry Date Range**. Only students that re-entered within the specified date range will be included in the batch to assign services. If this field is left blank, *all* re-entry start dates are eligible.
8. Optional: Select a **Graduation Date Range**. Only students that graduated within the specified date range will be included in the batch to assign services. If this field is left blank, *all* graduation start dates are eligible.
9. Optional: Select a **Program Version**. Only students that started within the specified date range that you selected above, and are in the program version that you select here will be included in the batch to assign services. If this field is left blank, then *all* program versions are eligible.
10. Optional: Select a **Status**. Only students that started within the specified date range that you selected above, and are in the status that you select here will be included in the batch to assign services. If this field is left blank, then *all* statuses are eligible.
11. Optional: Select a **Student Group**. Only students that started within the specified date range that you selected above, and are in the Student Group that you select here will be included in the batch to assign services. If this field is left blank, *all* student groups are eligible.
12. Click **Next >>** to continue. Step 3 of 3: Specify Student Selection Criteria is displayed.



13. Click **Select All** or **Clear All** to select or clear all students at one time, or select or clear student individually using the student's **Select** check box.
14. Click **Print** to print the **Student's Services List** report.



Student's Service List

rpt_SsServicesList.rpt
ADMINISTRATOR

4/4/2007
11:08:35AM

Service Category - Housing Service Category

Service - Reserved Parking Space

Student Group - Housing Service Category

Student Name	Start Date	Program Version	Description	Amount	Selected
Uthe Deb	5/1/2006	Certificate in Facilities Management	Active	500.00	yes
Ackerman Ryan	3/1/2005	Associate in Financial Management	Attending	100.00	no
Jones Mike		Bach. of General Management	Active	100.00	no
Abel-McHann Jacqueline	9/4/2006	Bach. of General Management	Attending	1,000.00	no
Uthe Deb		Faciliities Management for 2005S	Active	100.00	no
Abel-McHann Jacqueline		Bach. of General Management	Attending	100.00	no
new lead last new lead first		Credit Associate in Marketing Management	Future Start	100.00	no
Watt Mark		Marketing Version Catalog	Probation	100.00	no
Abel-McHann Jacqueline	9/4/2006	Marketing Version Catalog	Attending	400.00	no
Uthe Deb	9/4/2006	Marketing Version Catalog	Active	400.00	no
Smith John	9/4/2006	Marketing Version Catalog	Active	400.00	no
Uthe Deb		Marketing Version Catalog	Active	100.00	no
Smith John		Marketing Version Catalog	Active	100.00	no
Smith John	9/4/2006	Marketing Version Catalog	Active	100.00	no
Smith John		Marketing Version Catalog	Active	100.00	no
Uthe Deb		Credit Associate in Marketing Management	Active	100.00	no
Student Jane		Associate in Financial Management	Attending	100.00	no
Armstrong Robert		Associate in Financial Management	Future Start	100.00	no

15. Click **Finish**. All selected students will be assigned to the service selected in Step 1 of the wizard.
16. Click **<< Back** to return to the previous screen or **Cancel** to exit the wizard.

Daily > Housing

The Daily > Housing submenu options are as follows:

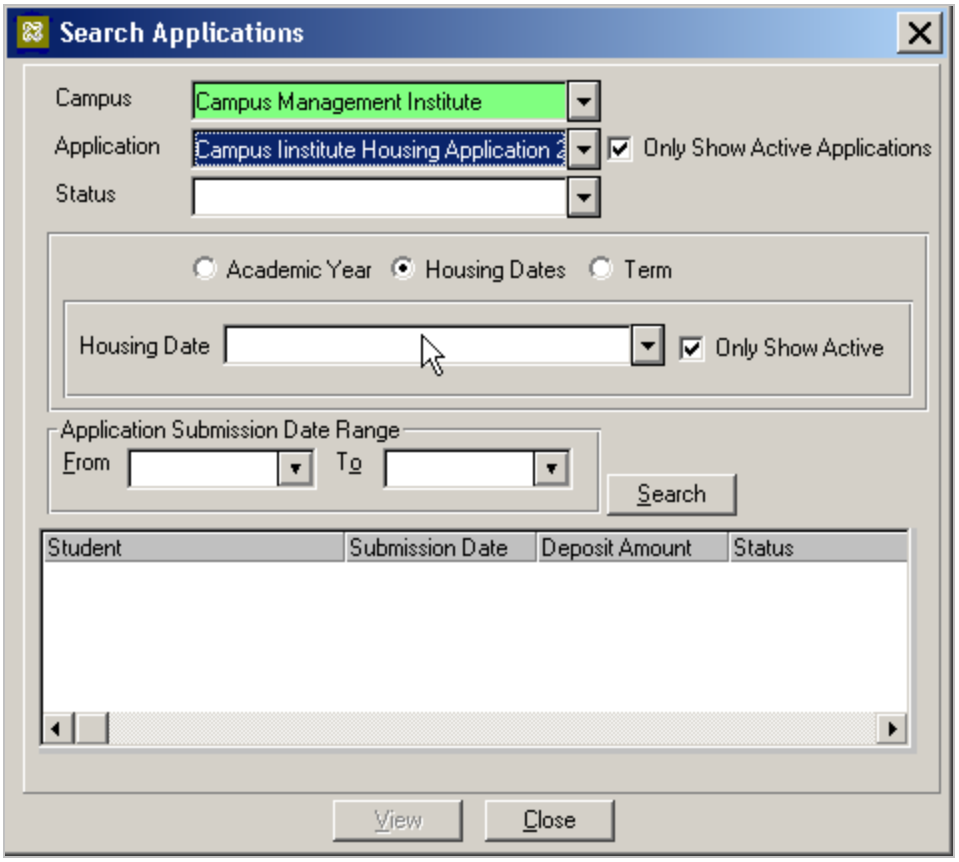
- Application
- Roommate Matching
- Post Rent Charges
- Batch Move Out/Renewal
- <Detach> (This options detaches the submenu.)

Search Applications

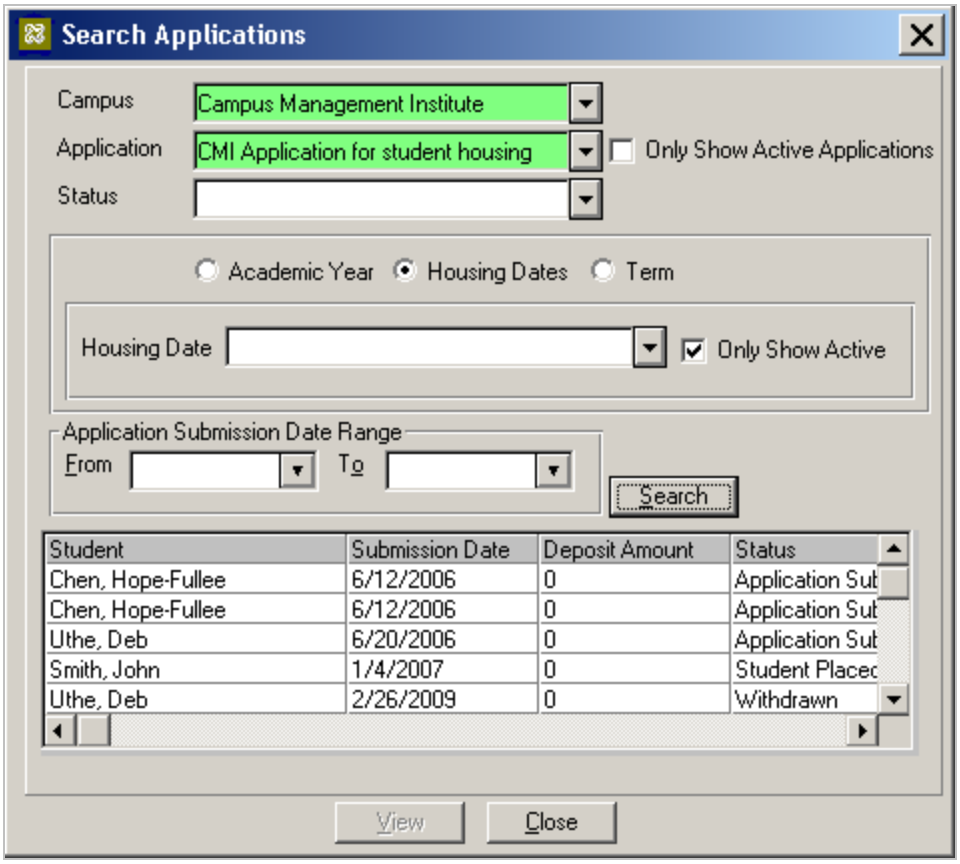
Use this form to search and view housing applications submitted by students.

To search and view housing applications submitted by students:

1. Navigate to **Daily > Housing > Application**. The Search Applications form is displayed.



2. Select the **Campus** for which you want to view submitted housing applications. When you select a campus, the housing applications associated with the campus are listed in the **Application** drop-down list. Select the housing application you want to view.
3. Select the **Status** of the housing applications you want to view.
4. Select **Academic Year**, **Housing Dates** or **Term**.
    - If **Academic Year** is selected, enter a **From** and **To** date range defined using the pop up calendar.
    - If **Housing Dates** is selected, select the applicable **Housing Date** from the drop-down list.
    - If **Term** is selected, select the applicable **Term** from the drop-down list.
    - Select the **Only Show Active** check box, if you only want to see housing dates or terms that are active, depending on your selections.
5. Select the **Application Submission Date Range** for the housing applications you want to view.
6. Click **Search**. Housing applications matching your search criteria are listed on the Applications form.



Multiple leases are displayed for Academic Year based applications, if they belong to an application that matches the criteria.

An Application search based on Academic Year will be done on a full month. For example entering a Search date with the following values - From: 4/15/2010 To: 1/5/2011 - will return all Academic Year based applications from 4/1/2010 to 1/31/2011.

7. To view an application, select the application and then click **View**. The submitted application is displayed. This form is read-only. The **Submit** button is disabled on this form.
8. Click **Close** to close the form.

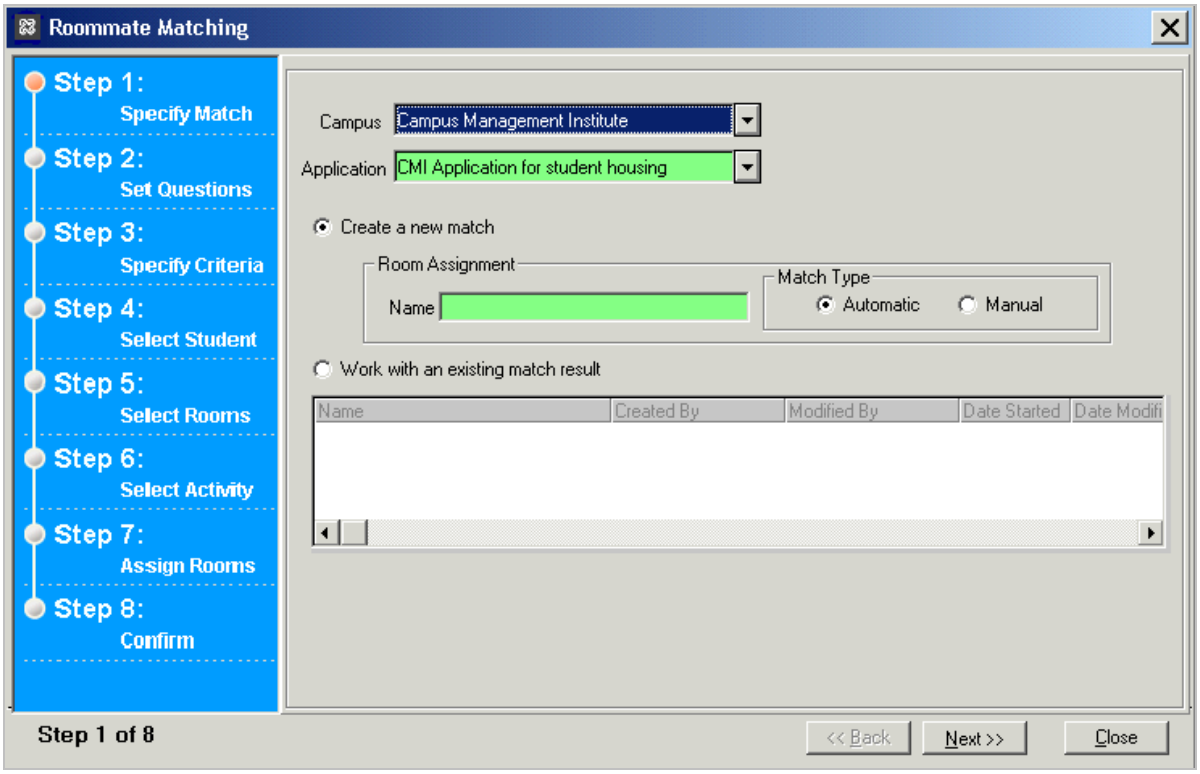
Roommate Matching

The Roommate Matching Wizard automates the process of sifting through housing applications for a campus. You can use this wizard to find students who are eligible for housing and then assign suitable rooms and roommates to them accordingly.

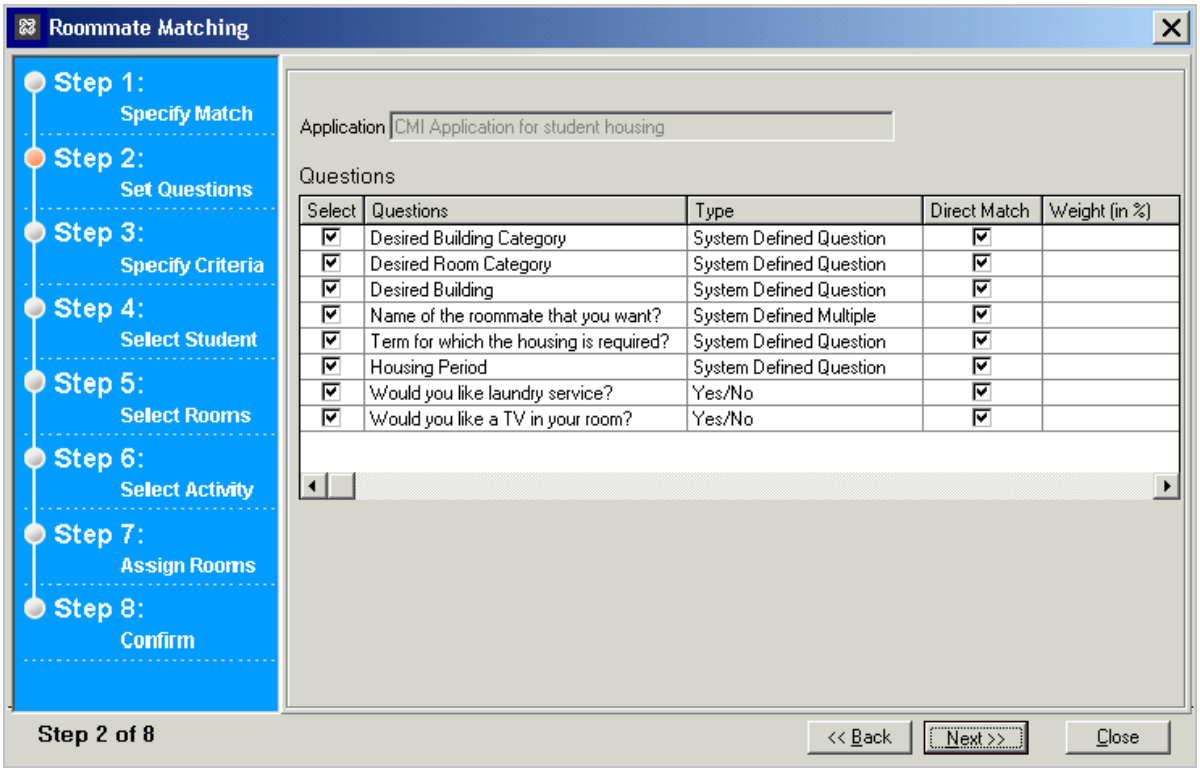
The Roommate Matching Wizard allows you to define the criteria to filter all the students who have applied for housing facilities in a campus and find those students who are eligible for housing. Next, you are provided with a list of available rooms for eligible students. You can then place the eligible students in these rooms and finally confirm a lease to be created using Roommate Matching for placed students.

To run a roommate match:

1. Navigate to **Daily > Housing > Roommate Matching**. Step 1 of 8 of the Roommate Matching Wizard is displayed.



2. Select the **Campus** for which you want to run the roommate match. When you select a campus, the active application associated with the campus is automatically populated in the **Application** filed. However, to run the match for an inactive housing application associated with the campus, select the inactive application from the drop-down list.
3. If you are creating a new match, select the **Create a new match** option button, and then enter a **Name** for the new match.
4. Select the match type as **Automatic** or **Manual**.
5. If you have previously run a match and saved it before completing the eight steps of the wizard, it is listed in the screen. To complete such a match, select the **Work with an existing match result** option button, and then choose an existing match from the list. The **Campus** and **Application** fields are automatically updated in this case. The list of saved roommate matches is displayed based on the campus selected.
6. Click **Next**. Step 2 of 8 of the Roommate Matching Wizard is displayed.



7. Step 2 lists all the questions with the status as **Active** included in the housing application you selected in step 1. Include or exclude the individual questions by selecting or clearing the **Select** check boxes accordingly.

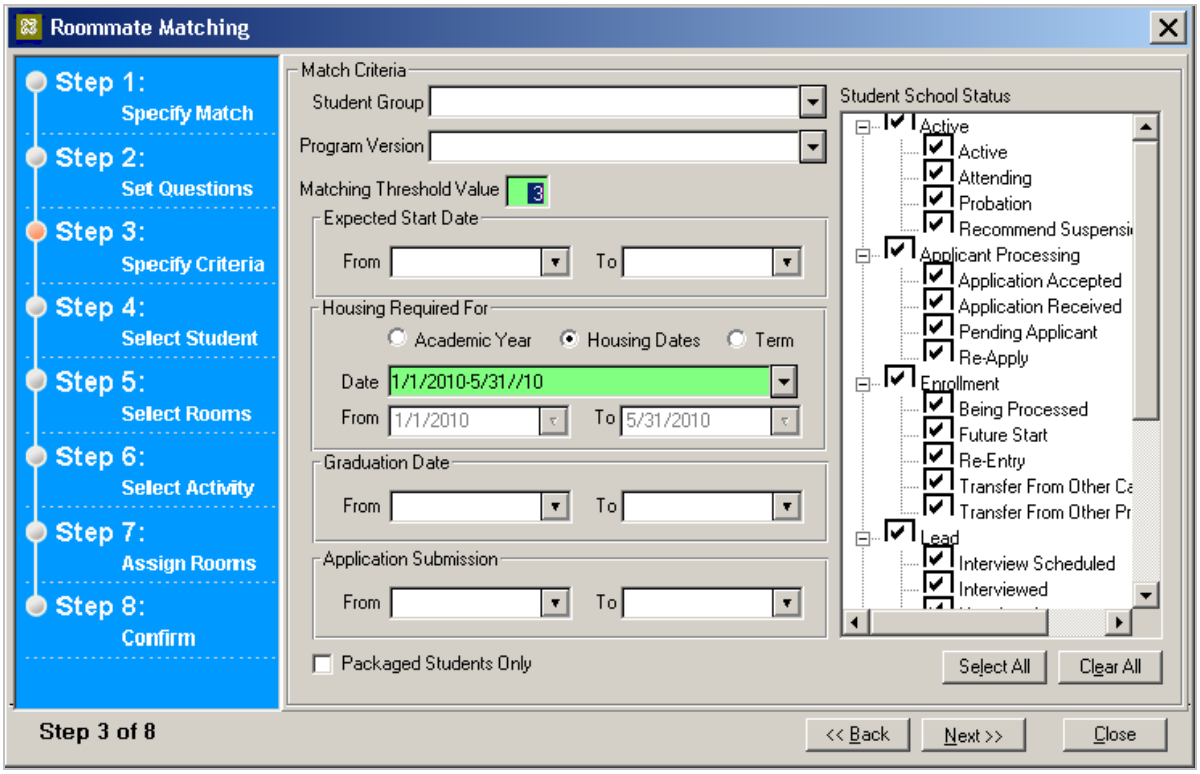
   Note: If you selected Match Type as **Automatic** in step 1, the following questions must be part of the student's Housing Application and must also selected in the wizard:

   - Desired Building Category
   - Desired Room Category
   - Desired Building
   - The name of roommate must be set to NO.

8. Define the following attributes for the selected questions. You will not be allowed to attribute both **Direct Match** and **Weight (in%)** at the same time to a selected question.

   - **Direct Match**: If you enable the **Direct Match** check box for a question, it implies that the answer for the question has to directly match for two students to be considered as roommates.
   - **Weight**: For such questions that do not need to match directly but need to be considered in the roommate matching process, provide the weight in percentage that the question holds in the **Weight (in %)** column. The sum of the weights assigned to such questions cannot exceed 100%.

9. Click **Next**. Step 3 of 8 of the Roommate Matching Wizard is displayed.



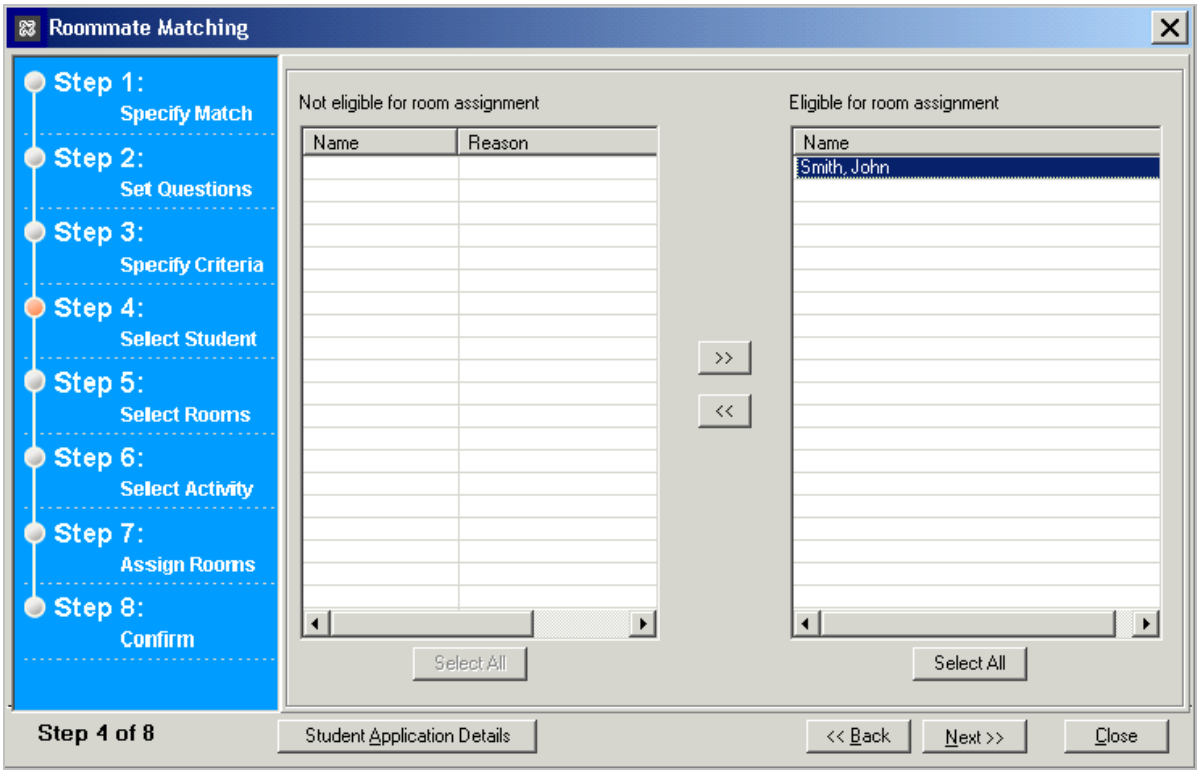
Note: If you are working with an existing match, you cannot edit the data in **Step 3**.

10. Specify the relevant match criteria in the various fields on this screen. These criteria are used to identify students eligible for the roommate match, out of all the students who have submitted applications. Those students who have not deposited the application fee (in case application fee was required while submitting the application) and/or are not packaged would not be considered eligible. For information about how to override the deposit and packaging validations, please see the Housing Setup topic located at Setup Menu > Housing > Housing Setup.

    Running the wizard using the Academic Year selection, select one of the following dates to filter the housing applications: **Expected Start Date**, **Housing Required For**, **Graduation Date**,**Application Submission**. If **Housing Required For** dates were selected, the system will gather students whose housing application is Academic Year Based and where the Academic Year is within the months specified. For example: Search date From: 4/15/2010 To: 1/5/2011 will return all Academic Year based applications from 4/1/2010 to 1/31/2011.

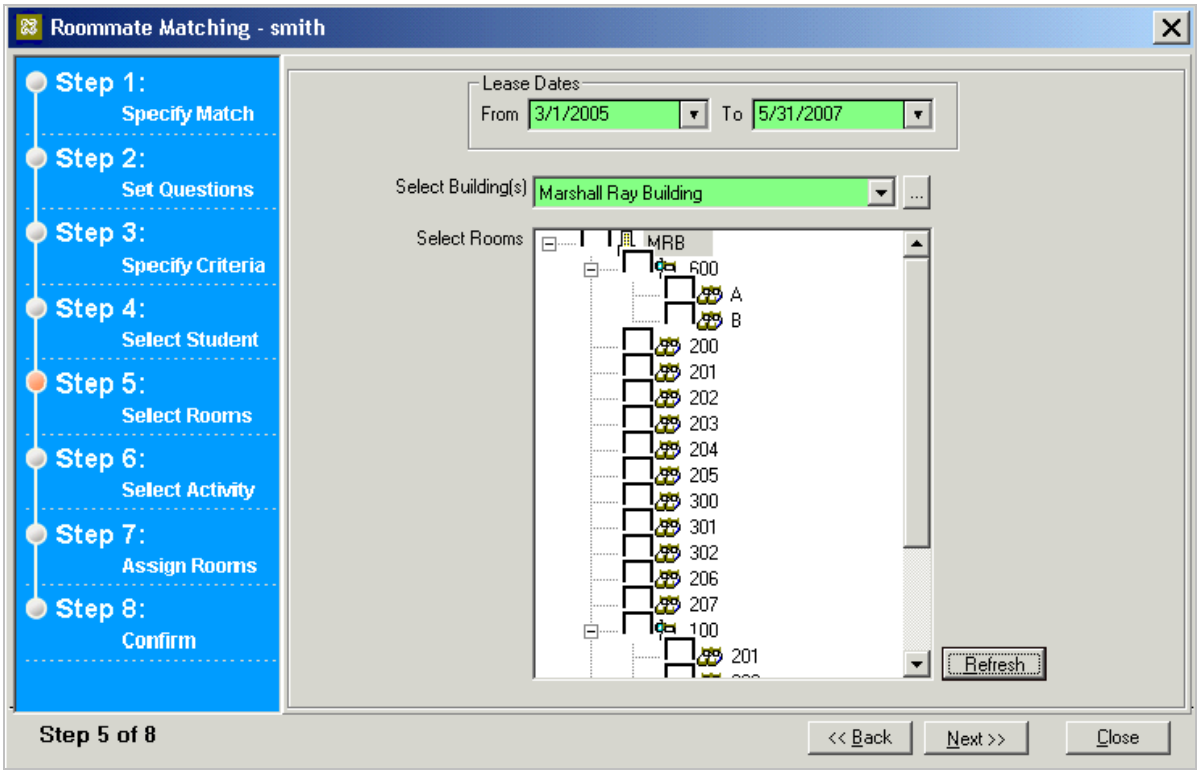
    Note: Academic Year based lease with room frequency of Term will not be pulled in the wizard.

11. Click **Next**. Step 4 of 8 of the Roommate Matching Wizard is displayed.



12. All the students matching the criteria specified in step 3 are listed in step 4, including those who are not eligible for roommate match as per these criteria. The ineligible students are listed so that you can manually specify them as eligible. You can now shift students from the **Not eligible for room assignment** list to the **Eligible for room assignment** list, and vice versa, by using the >> or << buttons.
13. You can view the housing application submitted by a student by selecting the student and then clicking the **Student Application Details** button. The housing application submitted by the student is displayed in read-only mode.
14. Until this step, the match will not be saved. Click **Next**. A confirmation box will appear asking you to confirm saving the match result. The confirmation box will appear only the first time you create a match or if you change the status of any student from not eligible to eligible (and vice-versa).
15. Click **Yes** to save the data of the first four steps of the wizard. The students placed in the **Eligible for room assignment** list will be locked, that is, these students will not be a part of any other match being performed for the housing period specified in **Step 3**.

    Step 5 of 8 of the Roommate Matching Wizard is displayed.



16. Specify the **Lease Dates** for the room assignment. By default, the housing dates mentioned in step 3 are populated in the **From** and **To** fields. In case you need to change the lease dates, ensure that the new **From** and **To** dates fall within the period between the start and end date of the housing dates mentioned in step 3.

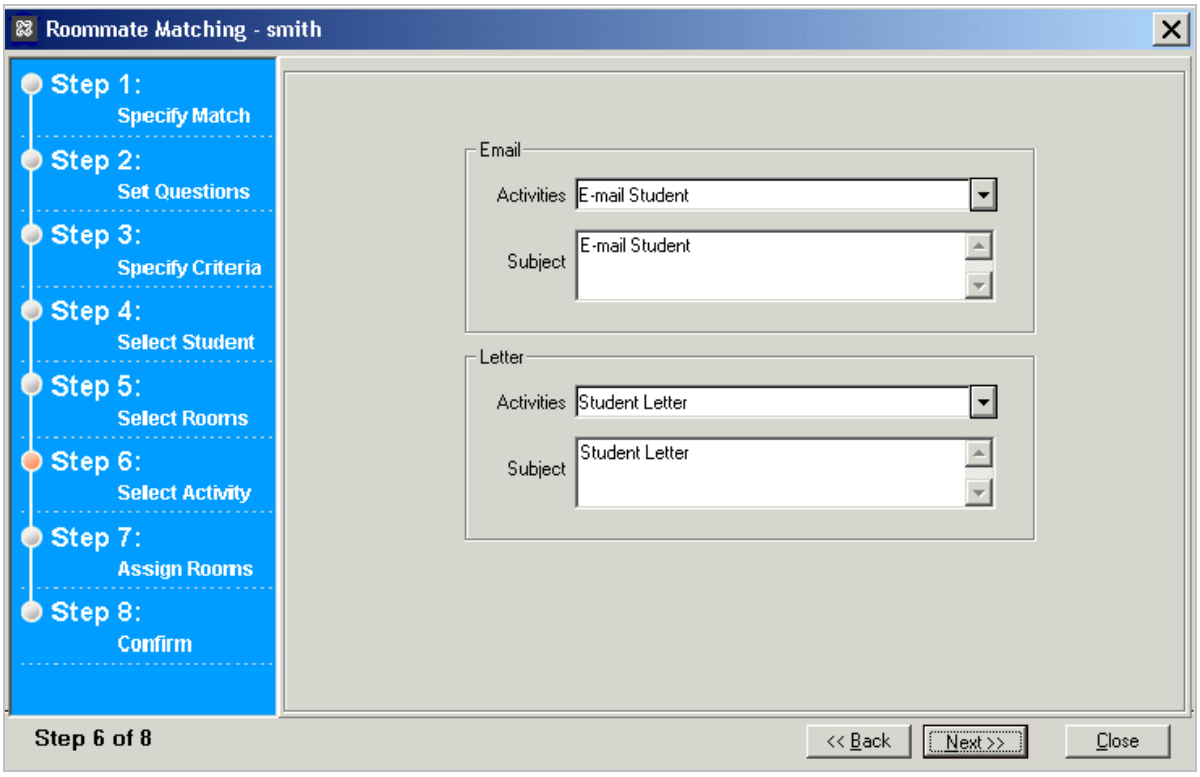
17. Select the **building(s)** where the students will be placed by clicking the ... button. Click the Refresh button. The system will present the suites and rooms associated with the selected building(s) in the Select Rooms area of the form. Place the mouse pointer on any node of the tree structure to view the related maximum capacity, normal capacity, and the number of the occupants.

    Note: A room is the place where a student is actually placed. A suite is a collection of rooms. A building can be a collection of rooms or suites, or both.

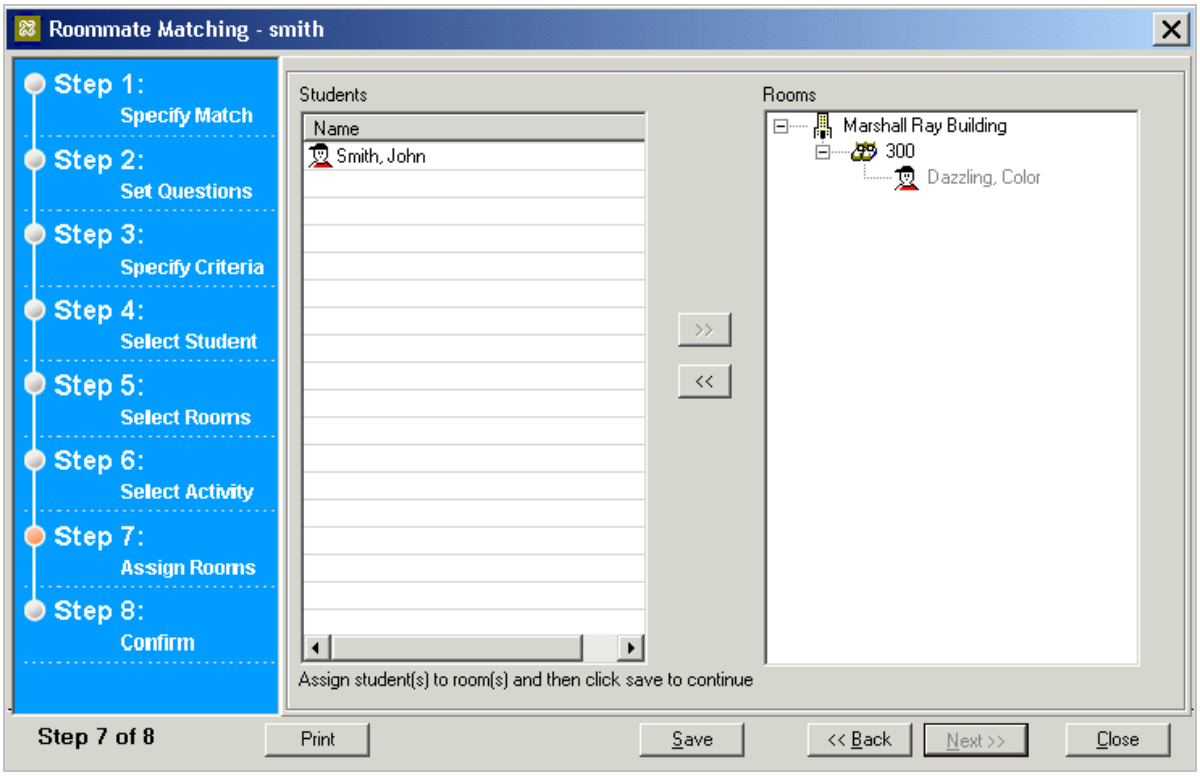
18. From the tree structure, select the rooms where you want to place the eligible students.

19. Click **Next**. **Step 6 of 8** of the Roommate Matching Wizard is displayed.

20. Select the **Activities** and specify the **Subject** that will be assigned to each of the placed student using the Contact Manager.

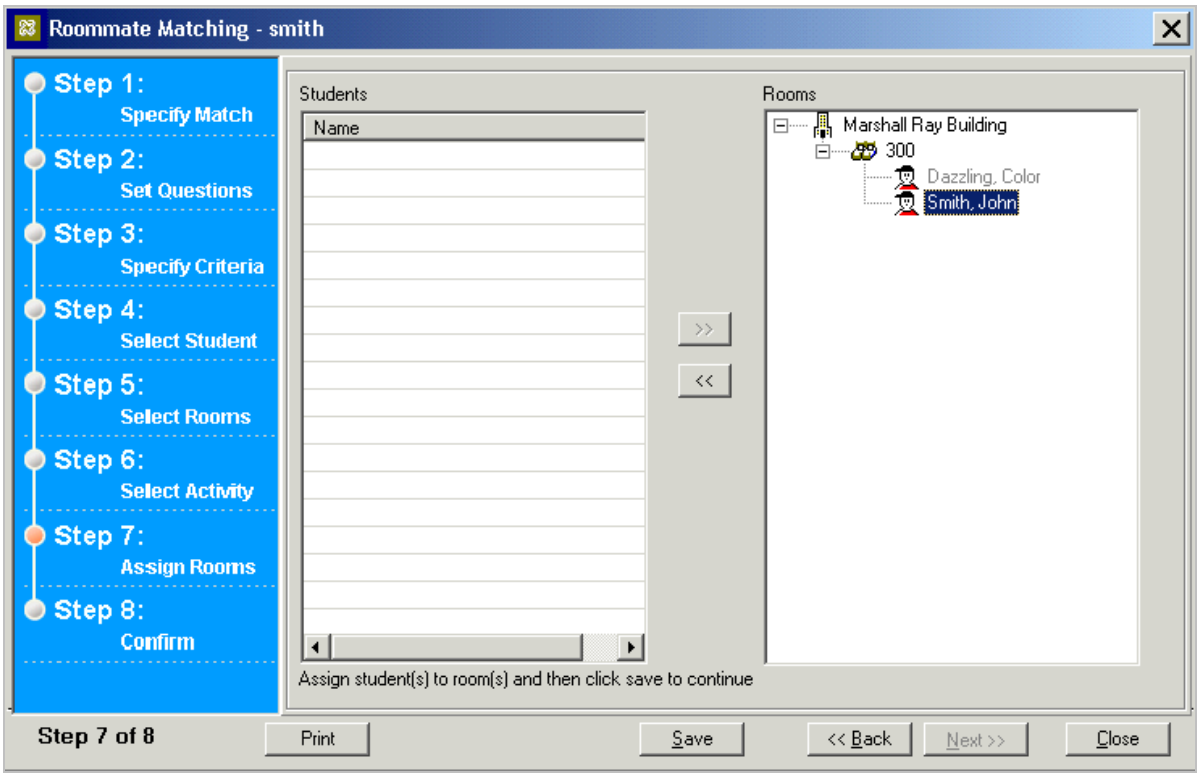


21. Click **Next**. Step 7 of 8 of the Roommate Matching Wizard is displayed. This step of the wizard allows you to assign rooms (identified in **Step 5**) to eligible students (identified in **Step 4**).



22. Click the

>> button to place a student in a room after selecting a student from the **Students** list and a room from the **Rooms** tree structure. Alternatively, you can drag and drop students from the **Students** list into a room in the **Rooms** tree structure.



Note: If you selected the match type as **Automatic** in step 1, the system will automatically match eligible students (identified in step 4 of the wizard) with suitable roommates and place them into the rooms. However, you can manually change the automatic assignments.

You cannot place a student in a room that has reached its maximum capacity or a room that expects a certain occupant type, which does not match the student profile. For example, a male student cannot be placed in a female-only type of room. The system will assign rooms (of a suite) based on the gender setting of the *suite*, not on gender setting of individual *rooms* of a suite. The gender rules are as follows:

- When the gender setting of suite is 'Male', then only male student
- When gender setting of suite is 'Female', then only female student
- When gender setting of suite is 'Co-ed', then students with any type of gender (M, F, U, N)
- When gender setting of suite is 'Either', then only one gender type, all males or all females

23. Place the mouse pointer on any node of the tree view to view the related maximum capacity, normal capacity, and the number of the occupants.

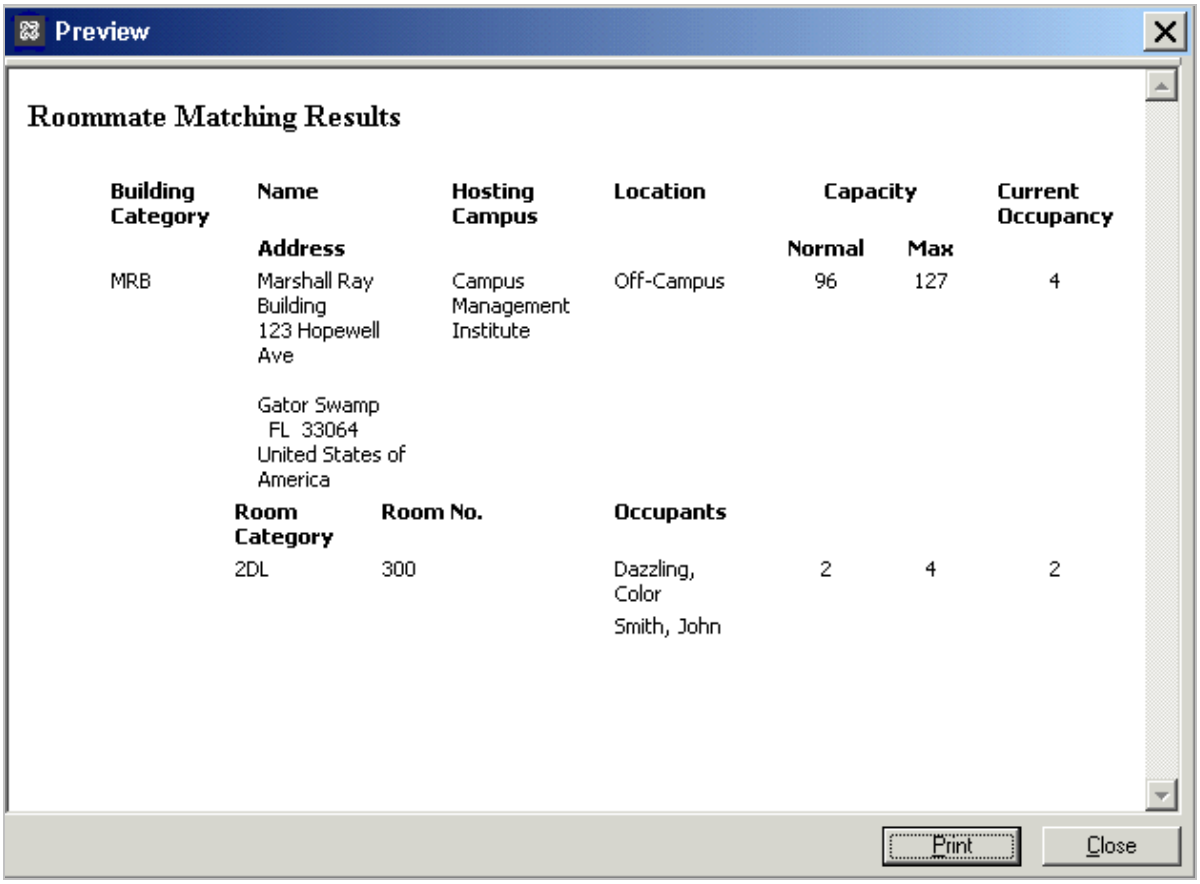
24. The << button has the opposite function, it allows you to remove a student from a room. Alternatively, you can drag and drop a student from a room in the Rooms tree structure into the Students list. Note that the students whose names appear in gray color (in the tree structure) have been placed in the room by some other match, such students cannot be moved from the rooms in this match.

    Note: Students can be moved from a room if their lease status is not updated as **Current** (see step 8).

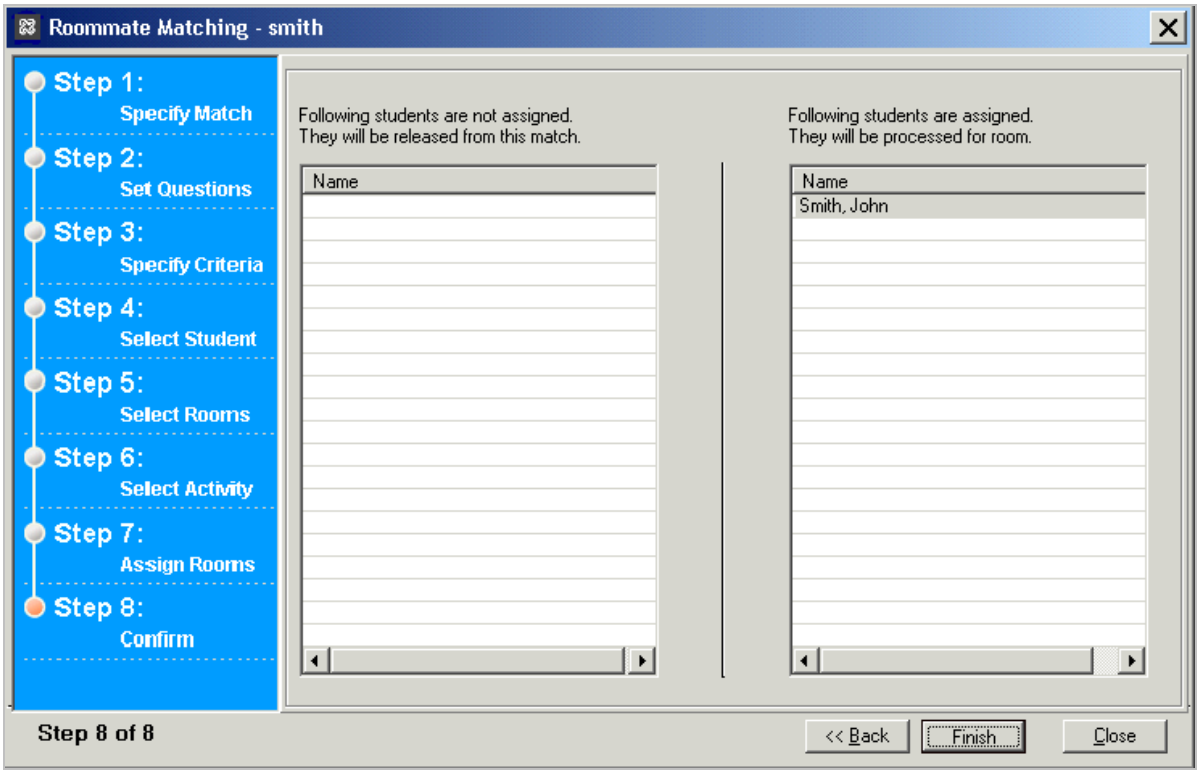
25. Click the **Save** button to assign students to the rooms. A lease is created for each student with the lease status as

'Pending'.

26. You can preview and print the roommate matching results by clicking the **Print** button.



27. Click **Close** to close the roommate matching results preview.
28. Click **Next**. Step 8 of 8 of the Roommate Matching Wizard is displayed.



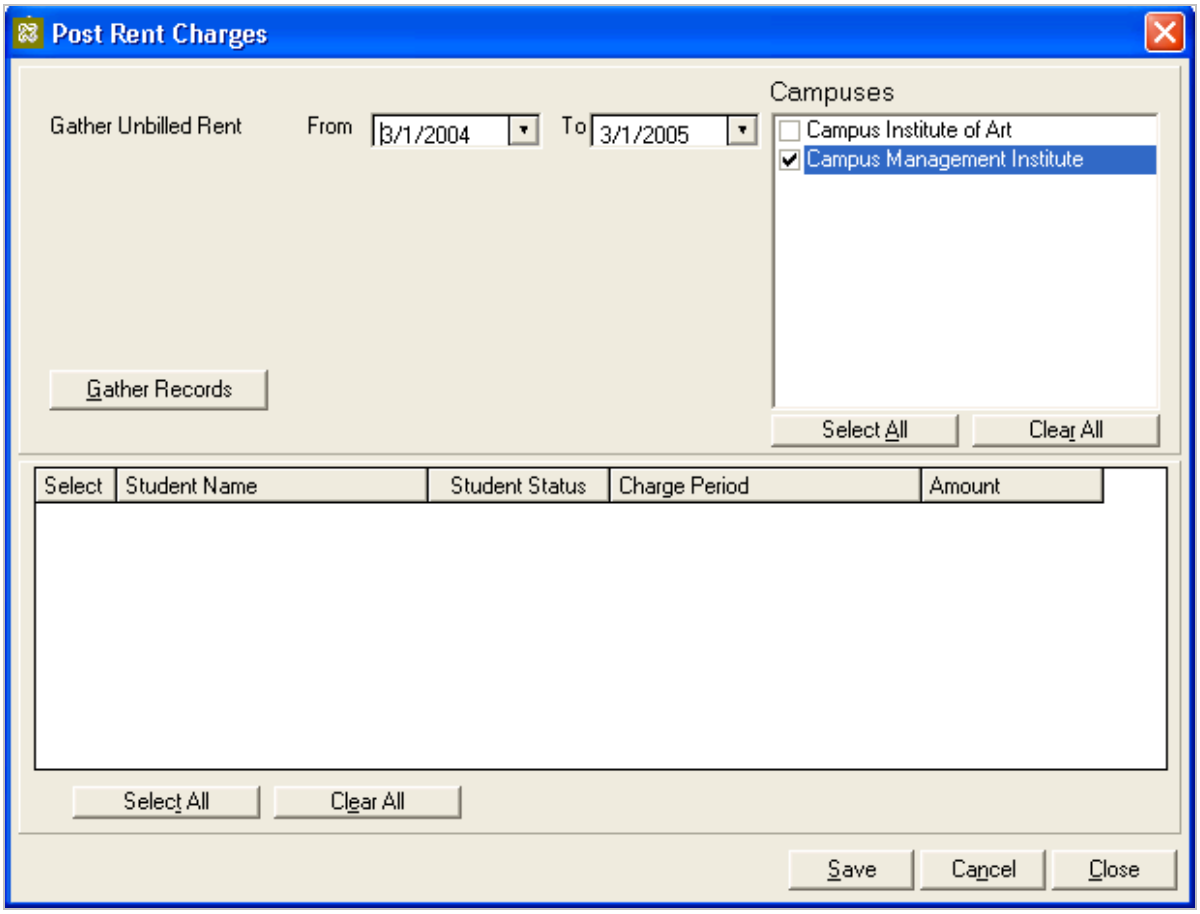
29. Step 8 shows two lists, one displaying the names of the students who are assigned rooms in this match and the other displaying the names of the students who are not assigned rooms in this match. Click **Finish** to confirm the rooms to be assigned to the students. A confirmation box will appear, asking you if the rooms allocated to students in the match be confirmed and the students who are not allocated be released from this match.
30. Click **Yes** on the confirmation box to confirm. The lease status for the students who are placed is now set to **Current**, the students who are not placed are released from the match, and the match is deleted. Students released from the match can be allocated rooms in some other match.
31. If Housing Lease has been configured to be printed via CampusNexus Student (Setup > Campus Location > Housing), you are prompted to confirm. Click **Yes** to print the lease(s) for the selected students.
32. See Working with Housing Lease.

Post Rent Charges

Users can post unbilled rent charges of students using the Post Rent Charges form. The form enables users select records based on the campus and the charge period (based on the **From** and **To** dates defined by the user).

To Post outstanding rent charges:

1. Navigate to **Daily > Housing > Post Rent Charges**. The Post Rent Charges form is displayed.



2. Select the **Campuses**. Click the **Select All** and **Clear All** buttons to select or clear campuses.
3. Select the **From** and **To** dates, and click **Gather Records** to display student records having outstanding rent charges within the dates selected.
4. Select the check box appearing at the top left corner of each record to post rent charges to the student ledger (View > Student Accounts > Ledger Cards). Click the **Select All** and **Clear All** buttons to select or clear all records.

   Note: Click **Cancel** to cancel a transaction.
5. Click **Save** to post the rent charges of the selected records to the student ledger.
6. Click **Close** to close the form.

Move Out or Renewal

The Move-Out/Renewal Wizard allows you to move-out student batches from housing accommodations or renew housing leases for student batches.

To move-out student batches:

1. Navigate to **Daily > Housing > Batch Move Out/Renewal**.
2. When Step 1 of the Move-Out/Renewal Wizard is displayed, select **Move-Out**.
3. Select the **Lease Start Date** and the **Lease End Date**.
4. Select the **Graduation Date** for the students to be moved out.
5. Click **Next**. Step 2 of the Move-Out/Renewal Wizard is displayed.
6. The students matching the criteria specified in step 1 are listed. Select the students to move-out by enabling the corresponding check boxes. You can click **Select All** to select all students, or click **Clear All** to clear all selected students.
7. Click **Next**. Step 3 of the Move-Out/Renewal Wizard will appear. The Move-Out frame in the wizard is activated.
8. Select one of the following system-defined move-out reasons from the **Move-Out Reason** drop-down list:
    - Lease Ended
    - Evicted
    - Changing Rooms
    - Medical Reasons
    - Personal Reasons
9. Specify a move-out date in the **Move-Out Date** field.
10. If you choose to refund the housing deposit by selecting the **Yes** radio button, the **Refund Amount** field is activated. Specify the refund amount in this field.
11. Specify a termination fee in the **Termination Fee** field. If you specify a termination fee, select the transaction code for the termination fee from the **Trans Code** drop-down list.
12. Select the **Termination Fee Subsidiary Code** from the list of subsidiary associated with the selected transaction code. This field is only populated when the transaction code selected for Termination Fee is associated with single or multiple subsidiaries.
13. Select a Contact Manager activity that will be sent to all students being moved out from the **Assign Activity** drop-down list.
14. Click **Finish**. A confirmation box is displayed.
15. Click **OK** on the confirmation box to close the Move-Out/Renewal Wizard.

Note: The lease status of all students being moved-out is changed to **Lease Broken**. Any active applications for the students would also be made inactive.

To renew housing leases for student batches:

1. Navigate to **Daily > Housing > Batch Move Out/Renewal**.
2. When Step 1 of the Move-Out/Renewal Wizard is displayed, select **Renewal**.

3. Select the **Lease Start Date** and **Lease End Date**.
4. Select the **Graduation Date** for the students whose housing leases need to be renewed.
5. Click **Next**. Step 2 of the Move-Out/Renewal Wizard is displayed.
6. The students matching the criteria specified in step 1 are listed. Selects the students whose housing leases need to be renewed by enabling the corresponding check boxes. You can click **Select All** to select all students, or click **Clear All** to clear all selected students.
7. Click **Next**. Step 3 of the Move-Out/Renewal Wizard is displayed. The Renewal frame in the wizard is activated in step 3.
8. Select the **Start Date** and the **End Date** for the new leases.
9. Select a Contact Manager activity that will be sent to all students whose leases are being renewed from the **Assign Activity** drop-down list.
10. Click **Finish**. A confirmation box is displayed.
11. Click **OK** on the confirmation box to close the Move-Out/Renewal Wizard.

Note: The new leases that are created have the start date and end date as specified in the Move-Out/Renewal Wizard, the remaining information, such as Building Name, Suite No, and Room No, is derived from the leases that are being renewed.

Reports Menu

This menu provides the following options:

- Executive Information
- Contact Manager
- Admissions
- Financial Aid
- Student Accounts
- Academic Records
- Distance Education
- Career Services
- Loan Management
- Student Services
- Housing
- Custom Reports
- Open Report Selector

The reports are organized by department modules. Each module has an alphabetically sorted list of reports. The number of reports for each module varies.

Your client workstation operating system determines how you view a long list of reports.

- If you are using Windows NT, the list is displayed in multiple columns.
- If you are using Windows 2000, Windows XP, or Windows 7, scroll controls are displayed at the top and bottom of the list.

Reports Overview

CampusNexus Student reports retrieve information from your school's database. From the Reports menu, you can access reports specific to a department (e.g., Admissions, Academic Records, Housing, etc.), choose the rules for selecting data, view reports, and print reports.

You can run standard CampusNexus Student reports and customize reports to accommodate your special reporting requirements.

The Report Wizard simplifies the process of running a report. The wizard guides you through the process of selecting parameters for displaying or printing reports.

The Report Viewer allows you to browse, print, and export a report. Using the Report Viewer you can also add students from the report to a student group or modify existing student groups based on report data. Further, you can use the Report Viewer's mail-merge tool to merge report data with letter activities.

The Cube Reports option offer a means of producing a multidimensional, spreadsheet-style report that can accommodate three or more dimensions in a report presentation.

The Executive Summary Report option is a collection of reports that provide a comprehensive summary of key business indicators within a school's operation.

General Features of Reports

- The title of the report is displayed in the upper left corner of each page.
- The selection criteria and the sort order are listed in the upper left corner of the first page.
- The name of the program that produced the report and the date and time of the report are listed in the upper right corner of the first page.
- Column headers are shown at the top of each page.
- Group headers are listed on the left side of the report as required by your sorting criteria. You can sort by all the available sort variables, but group totals are available only for the high-order three sort variables.
- The total number of records selected is listed at the end of the report.
- The company name appears in the lower left corner of each page. (This is the company name from the Setup > System menu option.)

Note: Reports from your system parameter tables can be printed in a similar manner from the Lists menu.

The G/L Summary and Detail reports and the G/L Account Code Setup report are displayed as HTML documents. When the HTML report is displayed, right-click on the report and then select Print from the context-menu to print it.

Using the Report Selection Form

The Report Selection form is displayed after you select a report from the Reports menu. The form enables you to specify selection criteria (filters) for the data in a report. For some reports, filtering is not needed. For other reports, not filtering could result in long search times and excessively large reports.

The selection tools on the Report Selection form are grouped as follows:

- Report Preference
- Sort Variables and Selected Sort Order
- Campus Selection Tab
- Selection Tab
- Student Groups Tab
- Employer Groups Tab

The record selection for a report is based on a view, depending on the tab that is visible when you click the **Preview** button.

- If the Selection tab is visible, the program selects records using the information provided on the Selection tab and the campuses selected on the Campus Selection tab.
- If the Student Group tab is visible, CampusNexus Student selects records using the selected student groups and the campuses selected on the Campus Selection tab.

Report Preference

You can use the Report Preference feature to save a set of report parameters that you want to rerun later. Preferences are saved for a specific report only.

To load or save report preferences:

1. Select a name from the **Preference Name** drop-down menu. If none exist, skip to step 3.
2. Click **Load** to apply the saved preferences.
3. Click **Save As** to save the current selection criteria under a new preference name, or click **Save** to save the current selection criteria under the current name.

You can also edit or delete your report preferences. After you edit you report preference, click **Save**. To delete your report preference, select the preference name from the list and click **Remove**.

Sort Variables and Selected Sort Order

For most reports, you can select sort variables and set in the order in which you want the variables to be sorted in the report. Some reports have required sort sequences and do not allow you to change the sort order.

The sort order determines how subtotals are grouped on the report. If three sort variables are selected, the report sorts the output by all three variables, in the order selected, and then groups the subtotals by the first two variables.

Note: Some reports require a minimum number of sort variables to total the data groups correctly. Therefore, you should select the same number of sort variables as used in the default sort sequence. A smaller or larger number of variables may yield an unexpected result when the report is displayed.

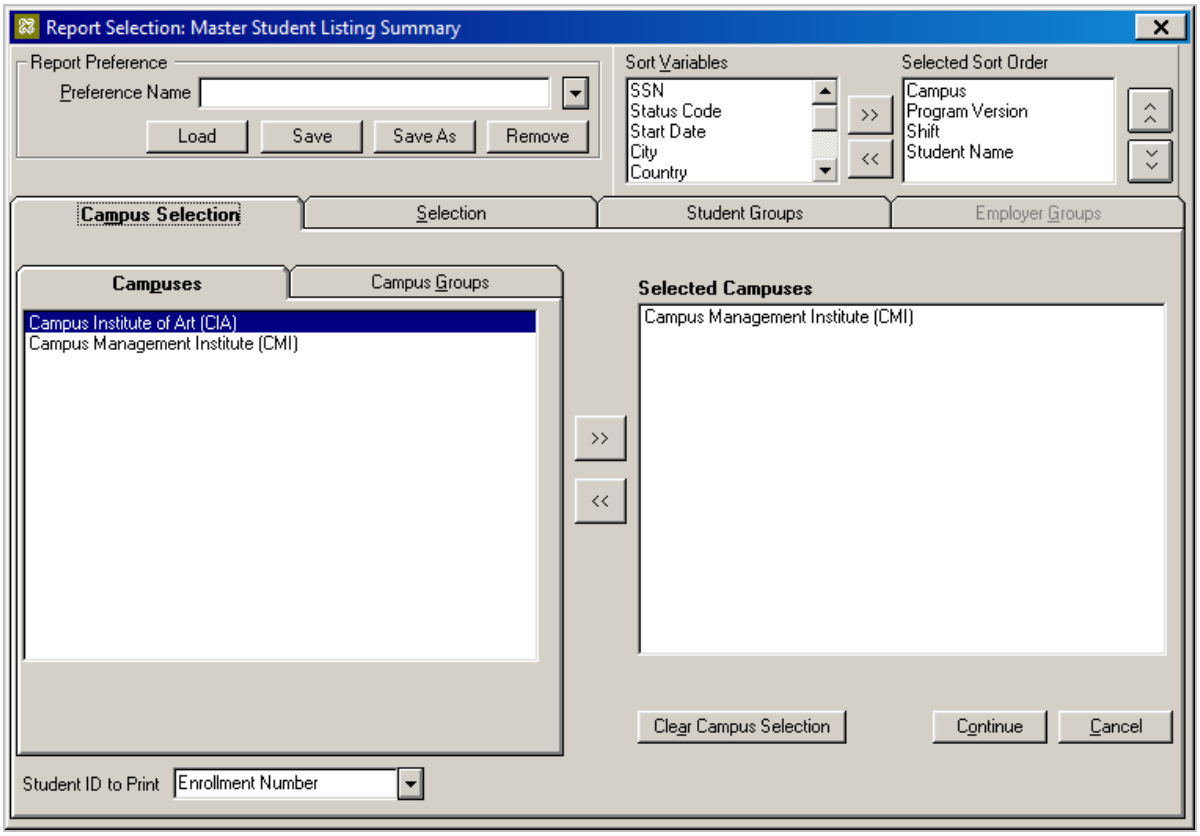
To select and sort variables:

1. In the **Sort Variables** box, select a sort variable and click >> or << to move the variables to and from the **Selected Sort Order** box.

2. In the **Selected Sort Order** box, select a sort variable and click ^^ or vv to change the order of the variables.

Campus Selection Tab

When you select a report, the Report Selection form is displayed with the Campus Selection tab in the foreground. The Campus Selection tab has two sub-tabs: Campuses and Campus Groups. The default campus in listed in the Selected Campuses box. The default campus is based on the Campus setting in your Session Parameters.



To specify the Campus or Campus Group selection criteria:

1. On the **Campuses** sub-tab, click a campus and click >> to move it to the **Selected Campuses** list. You can also double-click the campus to select it.

   Click a campus in the Selected Campuses list and click << to remove the campus from the Selected Campuses list.

   – OR –

   Click the **Campus Groups** sub-tab and select Campus Groups in the same manner as described above for campuses.

If necessary, click **Clear Campus Selection** to remove all campuses and campus groups from the Selected Campuses list

2. From the **Student ID to Print** select Student ID, Social Security Number, Enrollment Number, or None.

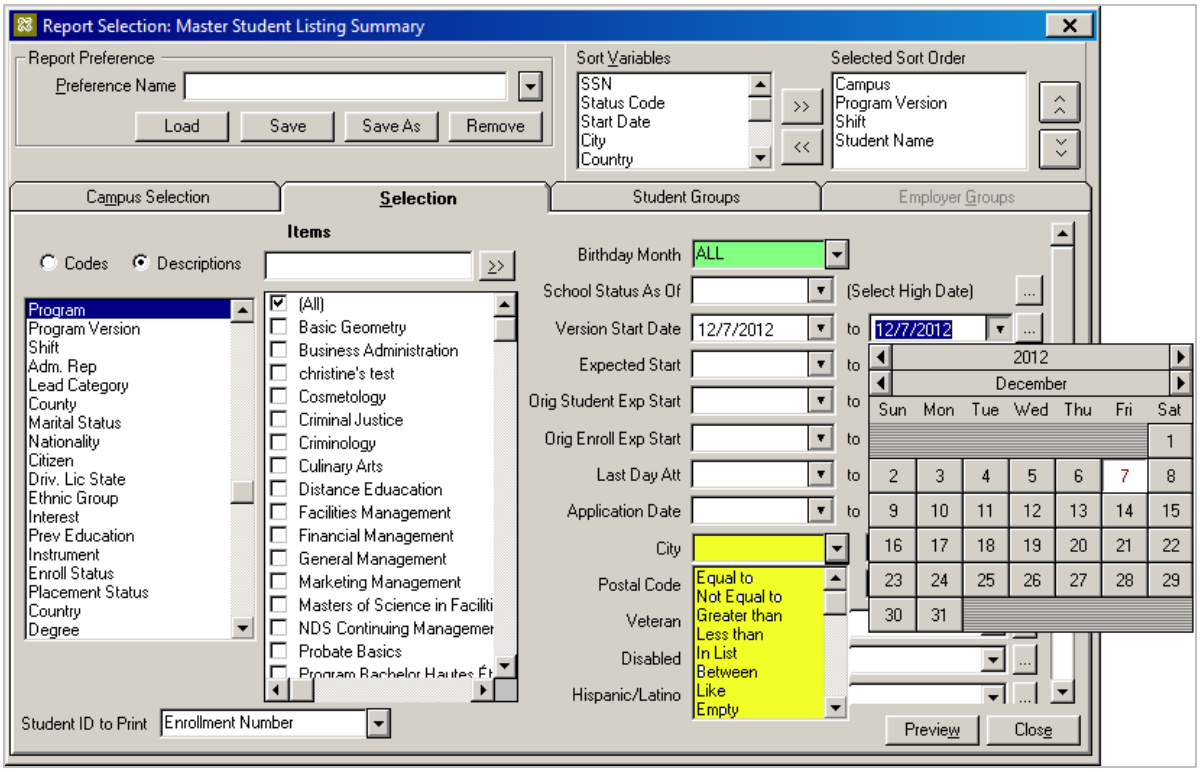
   Note: The ID is printed for each student selected for the report. The default Student ID to Print is chosen as a setup option (see Setup > System > Default ID on Reports). Most reports have all three student IDs available to print on the report. The SSN is required on some reports. Reports about leads (prospects) do not have an Enrollment ID. The ID selection is not used for reports that do not list individual students.

3. Click the **Selection** tab or the **Student Groups** tab to further filter the data for your report.

   Note: If you use the Student Groups tab, the criteria on the Selection tab do not apply.

Selection Tab

Use the Selection tab on the Report Selection form to define additional filters for the report data. The available filters vary between reports.



To filter data using the Selection tab on the Report Selection form:

1. The left side of the Selection tab contains a list of variables. Click **Code** or **Descriptions** above the list of variables to change the **Items** displayed in the right column. You can also enter a partial or complete Code or Description in the text box above the Items list to search for it in a long list.

2. Select **Items** in the list or accept the default of All. You can select any combination of items within a category.Select Empty or None to find the records that do **not** have one of the other values on the list.

Note: Any report that displays the Report Selection form and has status selection includes the degree-seeking and the Non-Degree-Seeking (NDS) Status codes. When Status Categories are available for selection, the NDS Status Category codes are also included.

3. Click to see the campuses for the Codes or Descriptions displayed in the Items list.

   Note: If **Term** is selected to display the list of terms for term selection, the **Select Term** button is displayed at the bottom of the form. Click **Select Term** to display the Term Selection form for reports. All terms (active and inactive) for the selected campus or campuses including Reporting Only terms are displayed for selection. When a parent term is selected, its child term is automatically selected.

4. Some reports require a **date** or **date range** to be selected before the report is run. The options for date selections include the following:

   - You can select specific dates from the calendar tool.
   - You can select dates such as Today or Yesterday on reports where there is a single date field, such as an As of Date.
   - If you select This Week on a single date selection, the system defaults to the last day of the week.
   - Relative Date options, such as Next Week, Last Year, This Quarter, are available in place of an actual date or date range. The system calculates the actual dates at run time and fills in the date values for the beginning and ending dates of last month on the report form. The relative date selection is displayed as a tool tip when hovering over the button on the report form.

     Note: The Relative Date options allow you to save report preferences that run for weekly, monthly, quarterly, or annual periods. When the preference is reused, the dates are calculated using the relative date selection and the current system date.

5. Some reports allow you to compare values, such as City or Postal Code. The **Comparison** options used in reports include:

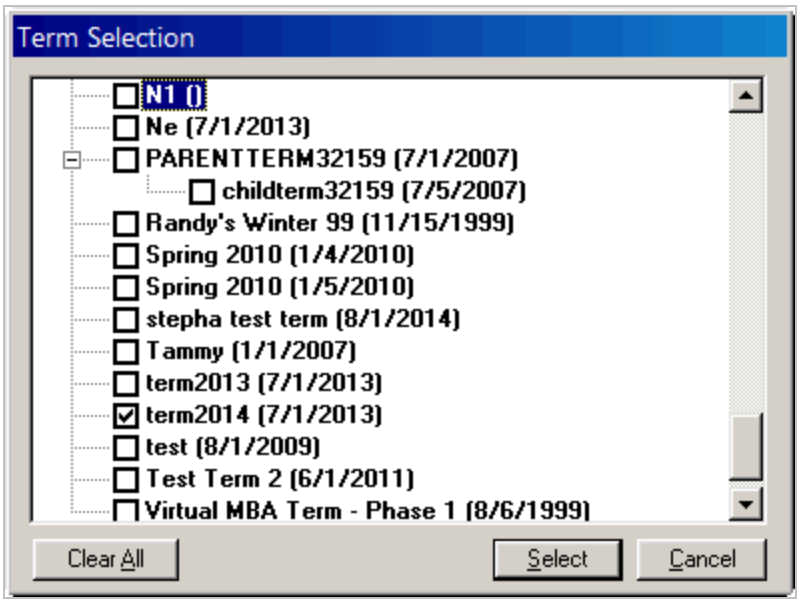
   - Equal to returns records with items that are equal to the value listed.
   - Not Equal to returns all records with items that are not equal to the value listed.
   - Greater than returns records with items that are higher than the value listed. Greater than 10 returns 11 or higher.
   - Less than returns records with items that are lower than the value listed. Less than 10 returns 9 or lower.
   - In List returns records that have values that match exactly. Use a semicolon (;) to separate multiple values.

     Note: When using variable comparisons, type a semicolon (;) between the values. For example: Between 30000;39999. In List 33441;33445;34555.
   - Between returns records with values listed within the upper and lower boundaries. Use a semicolon (;) to separate the upper and lower values. Between 100;200 includes 100 and 200, but not 99 nor 201.
   - Like may be used as a wild card. In the Postal Code example, "Like 33" would retrieve all the records in which 33 are the first two characters.
   - Empty returns records with no characters (not even blanks) in a character field. A field is not empty if it has

blank characters in it. If you completely delete a character field, it will not have blanks in it and it is empty.

- Is Null returns records with a numeric field that has never been initialized with data. It does not mean a numeric field is zero. A value of zero is data. A null field has no data in it.

6. Reports that include Term as a selection criterion provide a Select Term button at the bottom of the Selection tab. Click **Select Term** to display the Term Selection form.



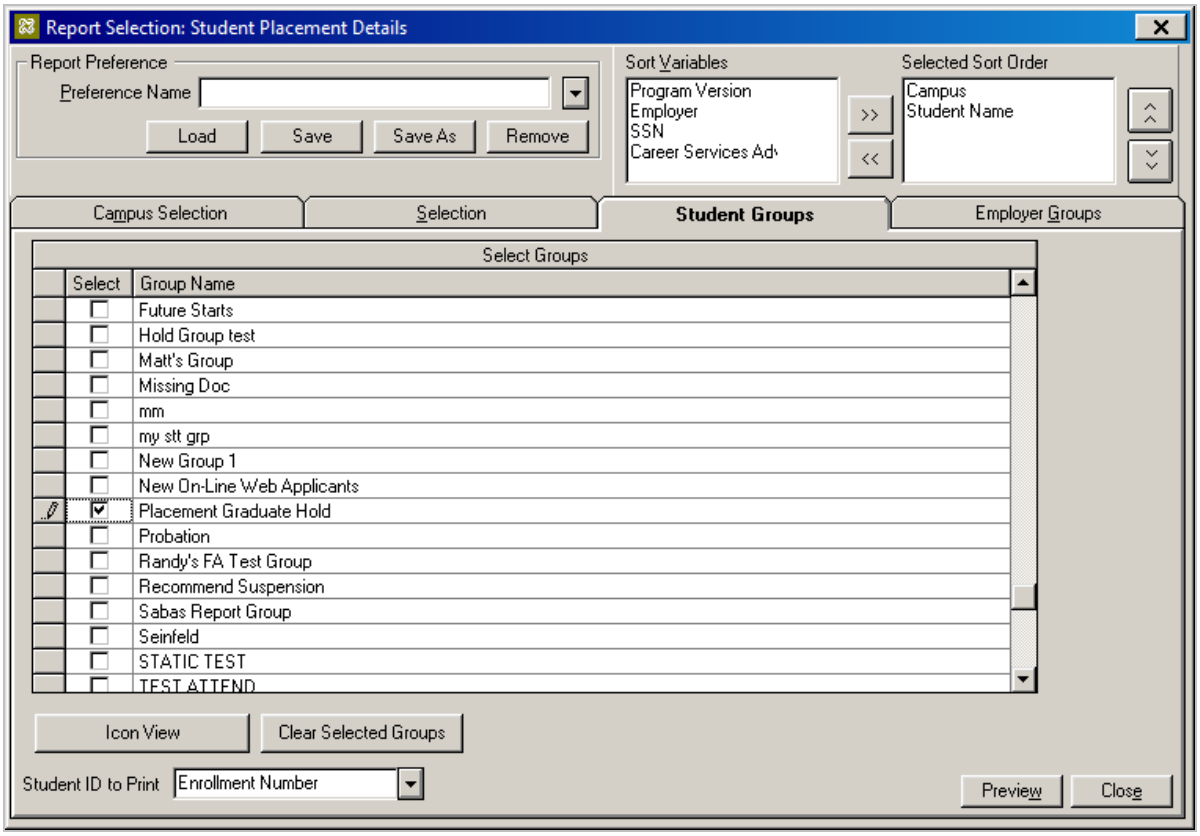
All terms (active and inactive) for the selected campuses including reporting only terms are displayed for selection. If a parent term is selected, its child terms are selected, too. You can select individual terms or all terms related to a parent term.

7. Click the **Student Groups** or **Employer Groups** tab (if available) to further filter the data for your report.

   Note: If you use the Student Groups tab, the criteria on the Selection tab do not apply.

Student Groups Tab

Click the **Student Groups** tab to report on one or more selected student groups.



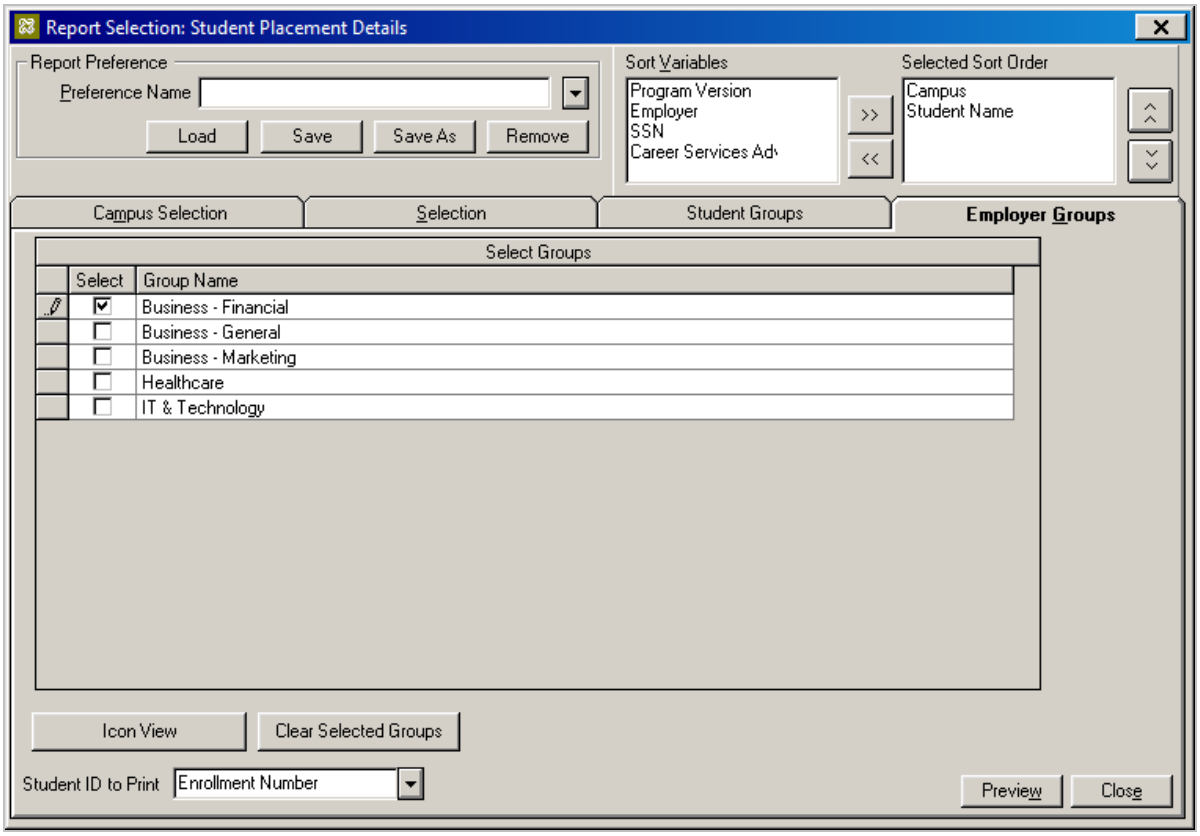
To filter data using the Student Groups tab on the Report Selection form:

1. Click **List View** or **Icon View** to view the student groups as text items or as icons.
2. Select one or more student groups for your report. To select multiple groups, use the **Shift** and **Ctrl** keys.

   Note: When you select student groups and then run the report, selections on the Selection tab are ignored. tab. When you select student groups, and then go back to the Selection tab, the selected student groups are ignored. Only the information on the visible tab is used to select records. Campuses selected on the Campus Selection tab are included in the report regardless of whether you are running the report from the Selection tab or the Student groups tab.

Employer Groups Tab

The functionality for Employer Groups mirrors the Student Groups functionality.

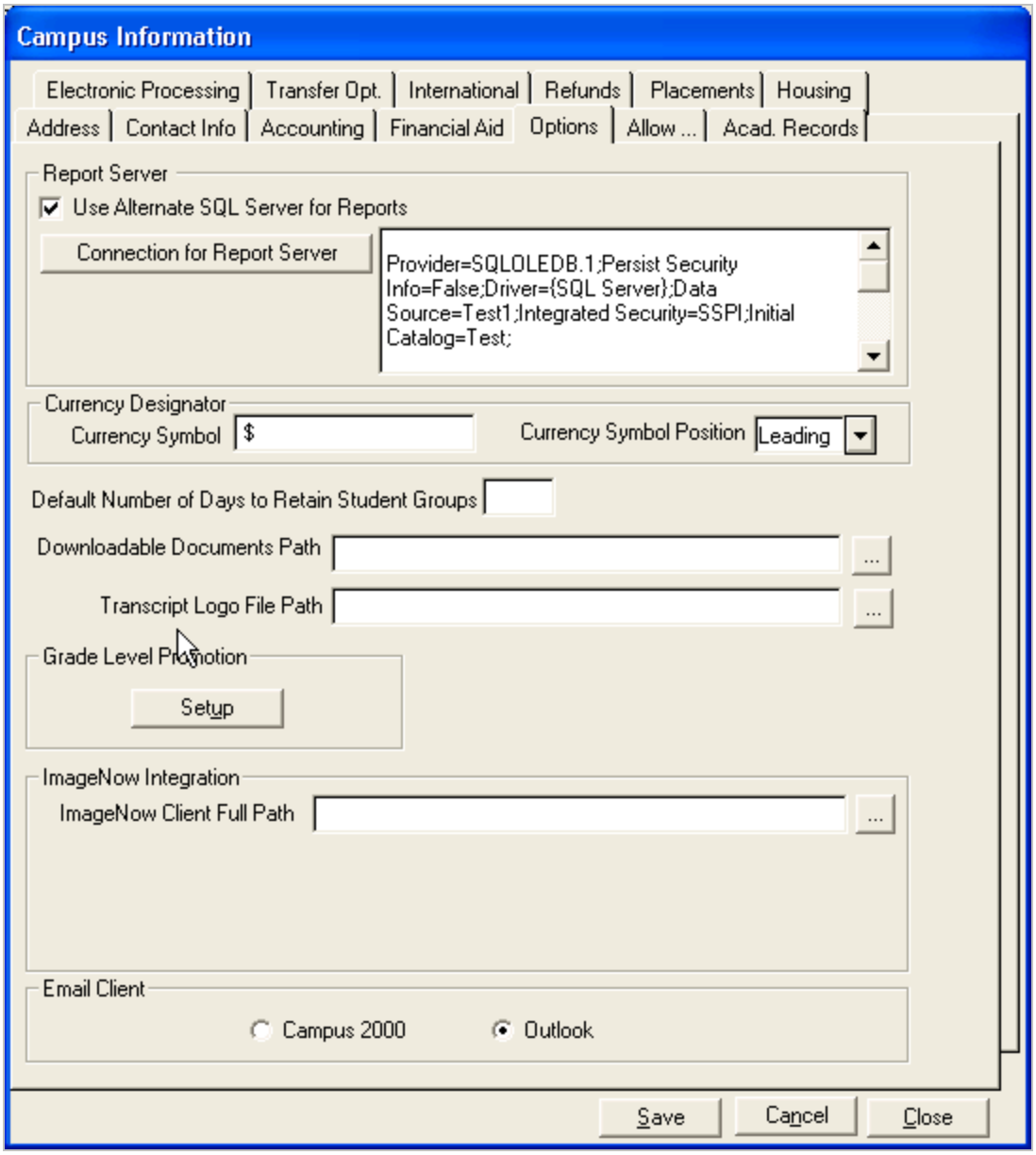


Use Report Server

The Report Server option only appears on the Report Selection form if a report server has been set up for your CampusNexus Student system.

There can be one reporting server set up for each campus. See Setup > Campus Locations > Campus Options.

Additionally, you must have permission to select the alternative report server before this option appears on the report selection form. See Setup > Staff > Staff Members > User Info Tab


Campus Information
Electronic Processing
Transfer Opt.
International
Refunds
Placements
Housing
Address
Contact Info
Accounting
Financial Aid
Options
Allow ...
Acad. Records
Report Server
Use Alternate SQL Server for Reports
Connection for Report Server
Provider=SQLOLEDB.1;Persist Security Info=False;Driver={SQL Server};Data Source=Test1;Integrated Security=SSPI;Initial Catalog=Test;
Currency Designator
Currency Symbol
$
Currency Symbol Position
Leading
Default Number of Days to Retain Student Groups
Downloadable Documents Path
Transcript Logo File Path
Grade Level Promotion
Setup
ImageNow Integration
ImageNow Client Full Path
Email Client
Campus 2000
Outlook
Save
Cancel
Close

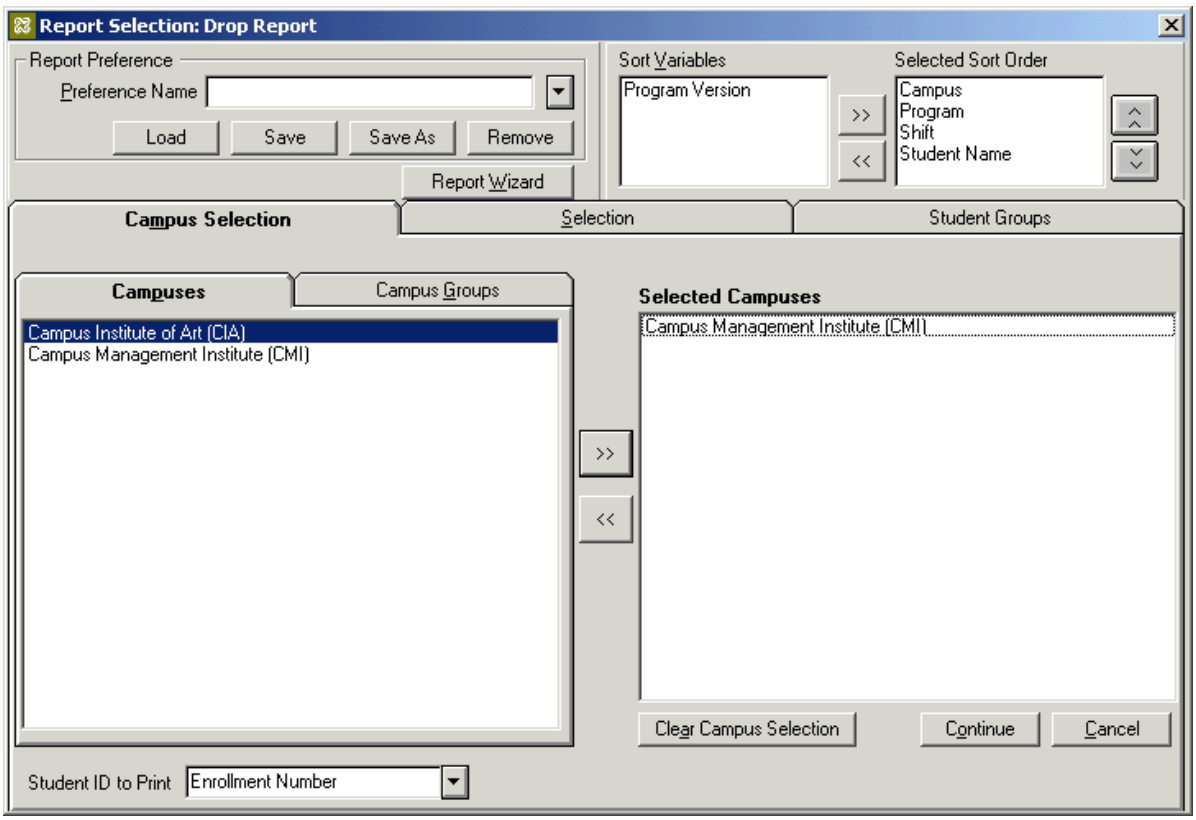
Using the Report Wizard

The Report Wizard guides you through the process of selecting parameters for displaying or printing reports. The CampusNexus Student generic and custom reports can be set up to use the report wizard (see Maintaining and Customizing Reports).

The **Setup > Staff > Staff Members > Staff Information > User Info** form contains a Default to Report Wizard option. If this option is selected, report selection defaults to the Report Wizard wherever it is available.

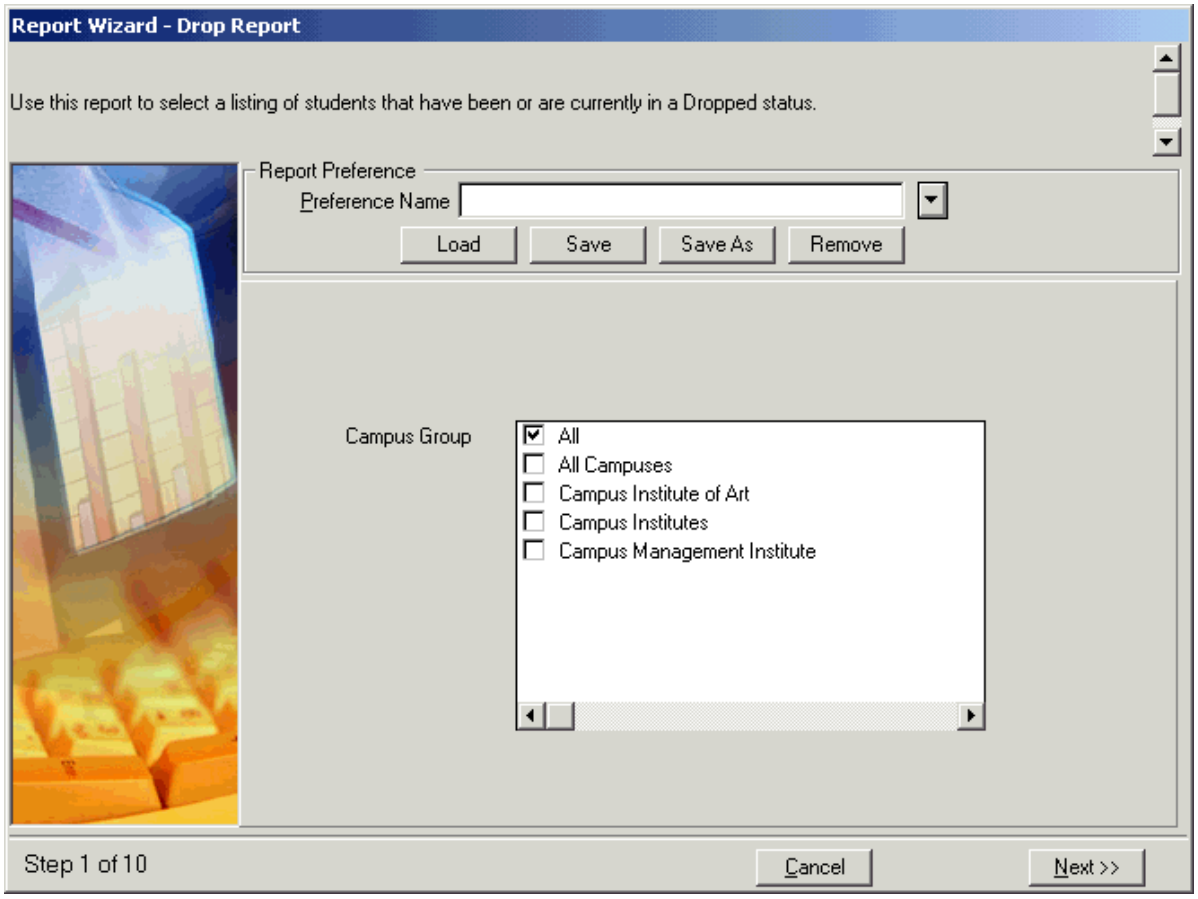
To run a report using the report wizard:

1. From the **Reports** menu select a report.
2. Depending on how CampusNexus Student is set up by your administrator, you might have to click the **Report Wizard** button on the Report Selection form to start the Report Wizard.

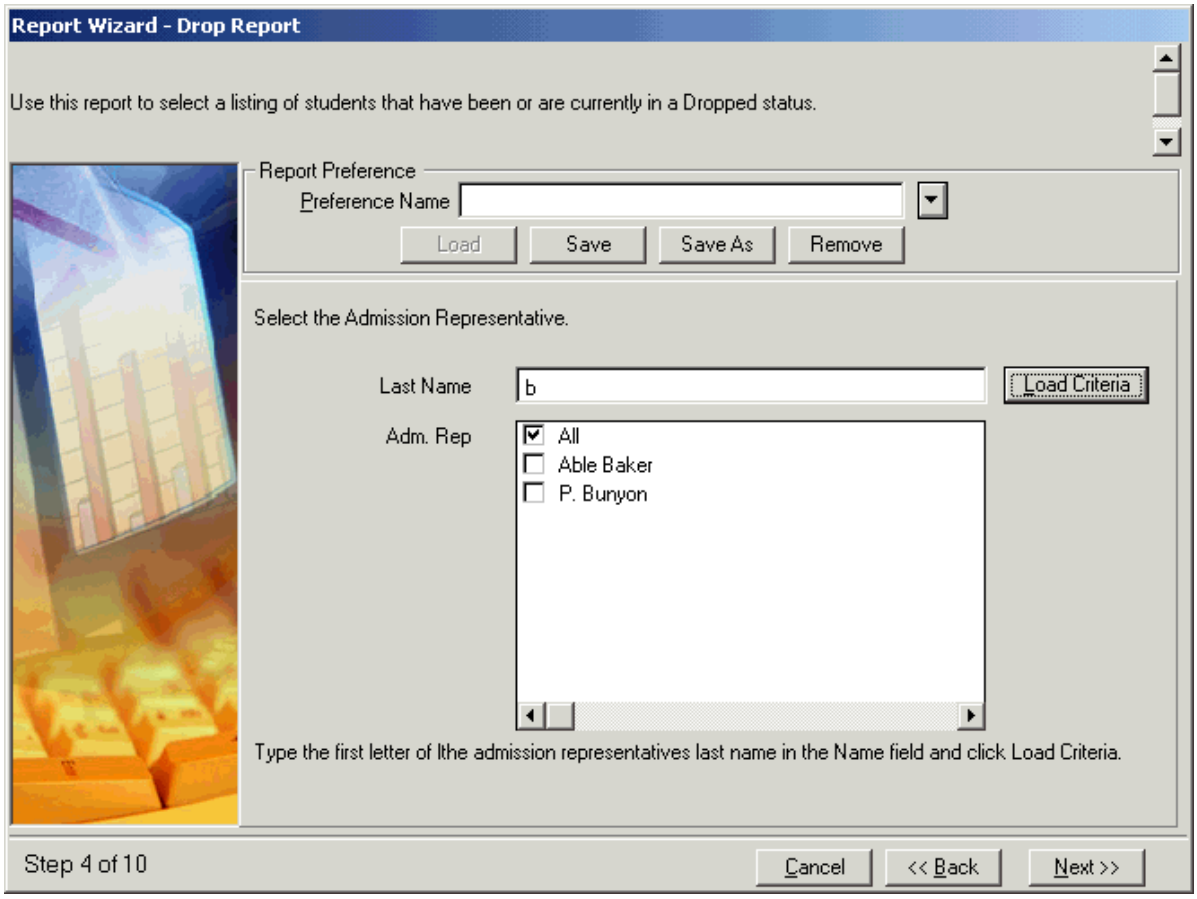


- OR -

The Report Wizard is displayed automatically.

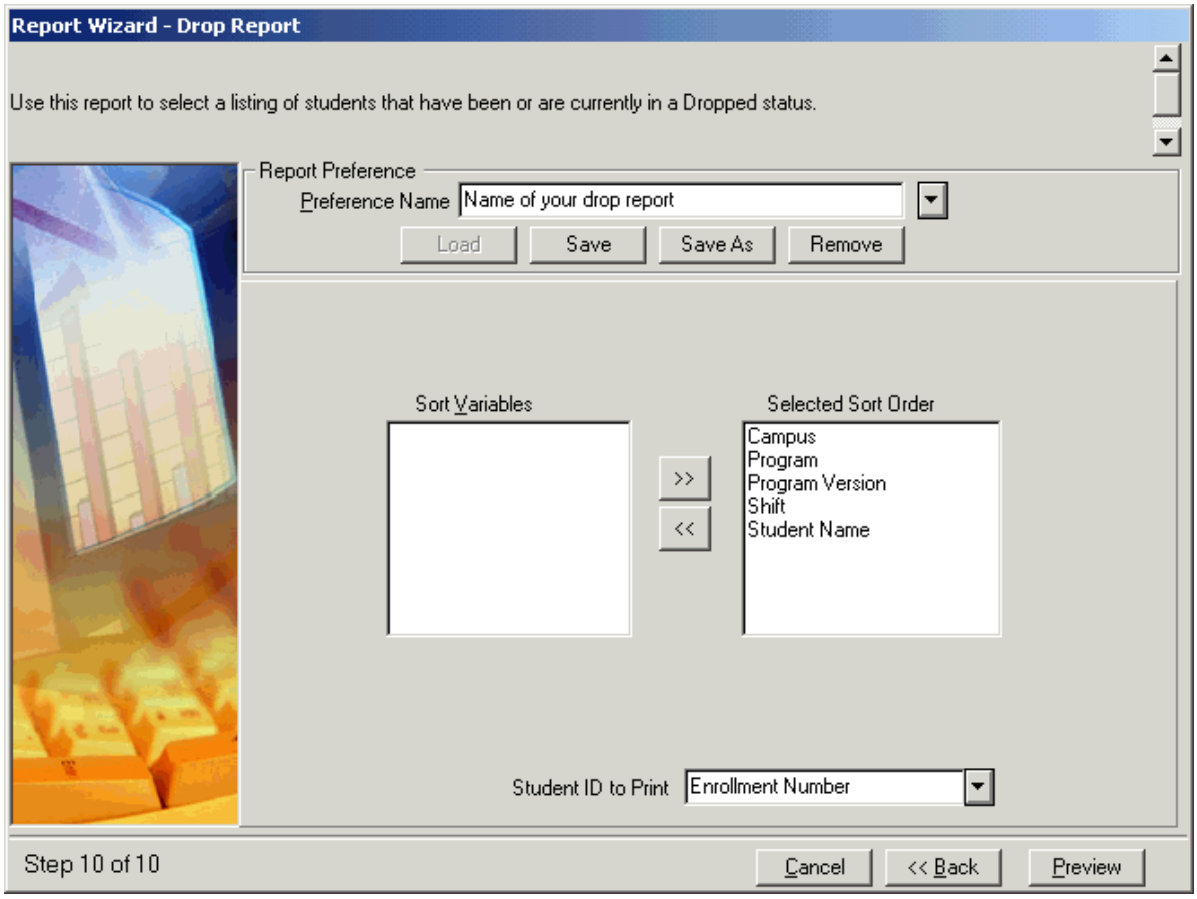


3. Select appropriate options on each form of the wizard. The number of forms depends on the number of available options.



Note: Click the **Load Criteria** button only when you have entered data in the field.

4. On the last form of the wizard, save your **Report Preferences** so that you can load the same preferences the next time you run the report .



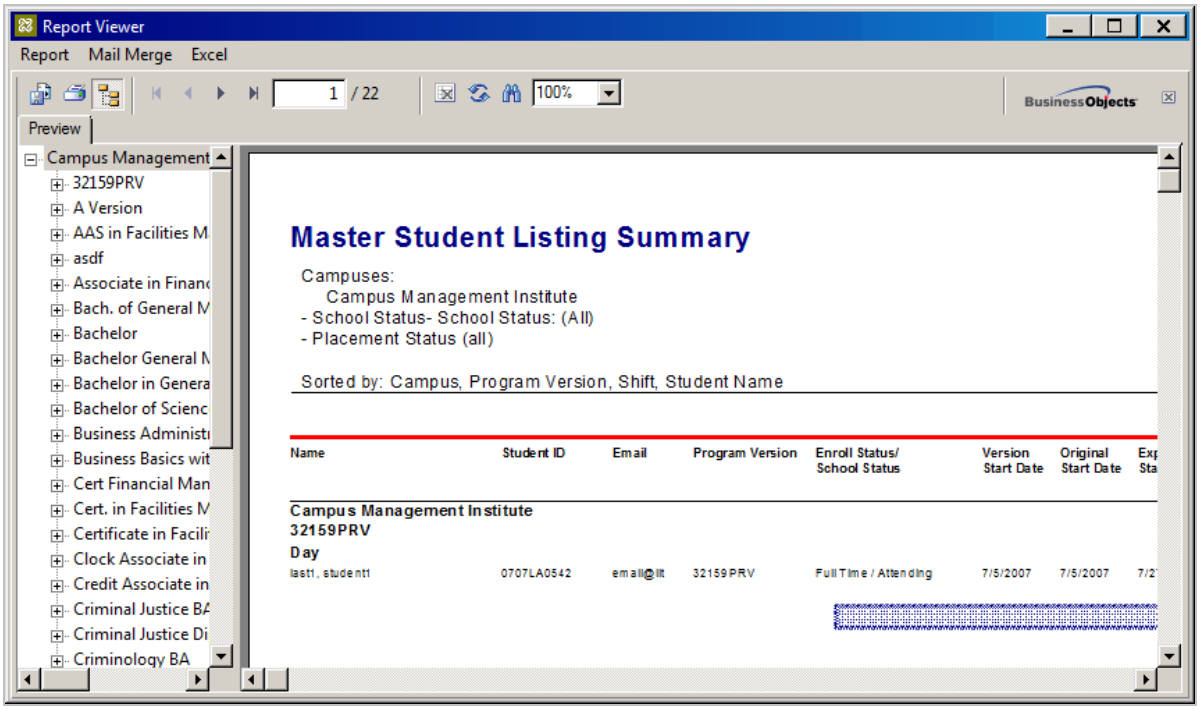
Note: When you select an **All** check box and save your Report Preference, CampusNexus Student applies your selection to all the options. This can result in a long list at the beginning of your report. If you run the report without loading a preference and select an All check box, the report lists just the All statement.

5. Click **Preview** to display the report in the Report Viewer.

Using the Report Viewer

The Report Viewer allows you to browse, print, and export a report. Using the Report Viewer you can also add students from the report to a student group or modify existing student groups based on report data. Further, you can use the Report Viewer's mail-merge tool to merge report data with letter activities.

The Report Viewer is displayed when you click **Preview** on a Report Selection form or in the Report Wizard.



The Report Viewer interface comprises a main window, and tabs, a menu bar, and several controls.

Main Window

The main window displays the report title, selection criteria, and report details.

When you move the cursor over the data displayed in the main window and the cursor changes to a magnifying glass, you can double-click to drill down into the details of the report.

Note: When you double-click a student name in a report, the Student Master form for that student is displayed.

Tabs

The **Preview** tab is displayed when a report contains several sections. Use the Preview tab to navigate to a specific section within a report. When you click a subsection in the Preview tab, another tab displays the selected subsection in the main window.

Report Viewer Menus

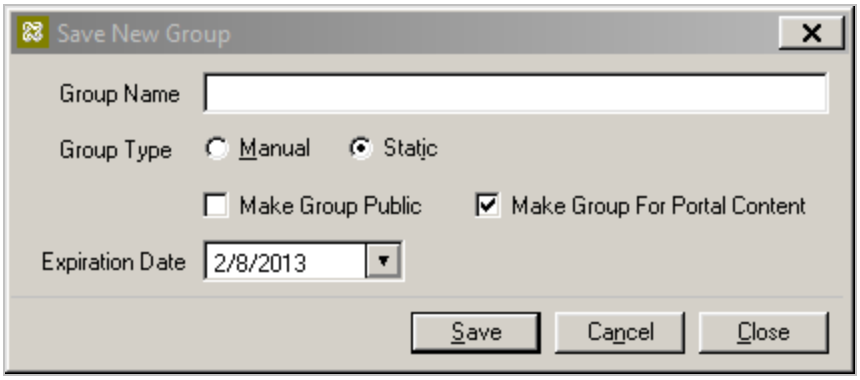
The Report Viewer menu options are Report, Mail Merge, and Excel.

Report Menu

Use the **Report** menu to perform the following tasks:

- Select **Print** or click to print a report. The print dialog box is displayed. Choose to print the complete report or selected pages. Indicate the number of copies to be printed. Click **OK** to send the report to the printer.
- Select **Print Setup** to select a printer, set the number of copies to be printed, and select other print options.
- Select **Save Student Group** to access the following options:
    - **Add Students to New Group**

      If the internal Campus ID and internal Student ID are contained in the record set for the report, you can save the students listed on the report as a group. Select this option and give your group a name.

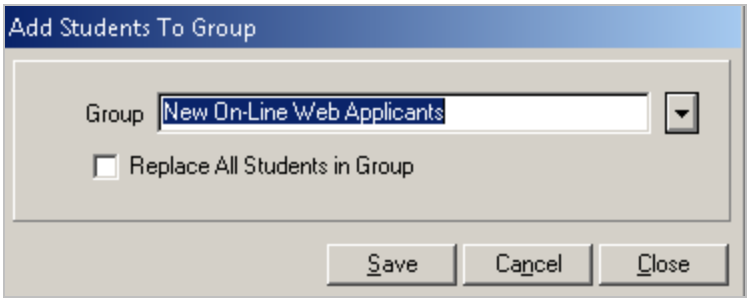
      

      Student Groups can be saved from report output if configured under **Setup > System > Other**. The initial type of the new Student Group is also defined on the system level.

      Note: To configure student groups for the Portal filter, select the **Active** check box on the Student Groups form and the **Make Group for Portal Content** check box on the Save New Group dialog box.

    - **Add Students to an Existing Group**

      Select this option to add the students listed in the report to an existing group.

      If applicable, select the **Replace All Students in Group** check box to replace all existing students in the group with the students listed in the report. If the check box is not selected, the students from the report are added to the existing students in the group.

      Click **Save** to update the student group.

      If the selected group was a non-manual group, you are prompted to confirm changing the group type to manual for the selected group.

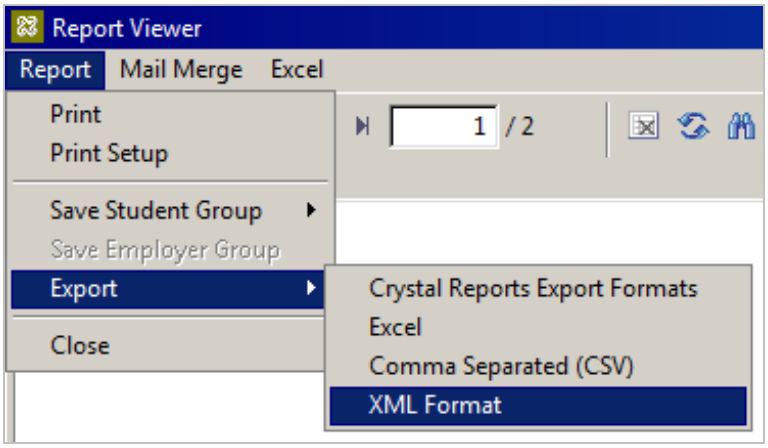
    - **Delete Students from an Existing Group**

Select this option to delete the students listed in the report from an existing group.

Click **Save** to remove all students listed in the report from the group. In this case, the relationship records are deactivated, but not deleted.

If the selected group was a non-manual group, you are prompted to confirm changing the group type to manual for the selected group.

- Select **Export** to access the following export format options:
  - Crystal Report Export Formats
  - Excel
  - Comma Separated (CSV)
  - XML Format



You can then select several options for **Format** and **Destination** of your report. Click **OK** after you make your selections.

- Select **Close** to close the report preview. The program returns to the **Report Selection** form.

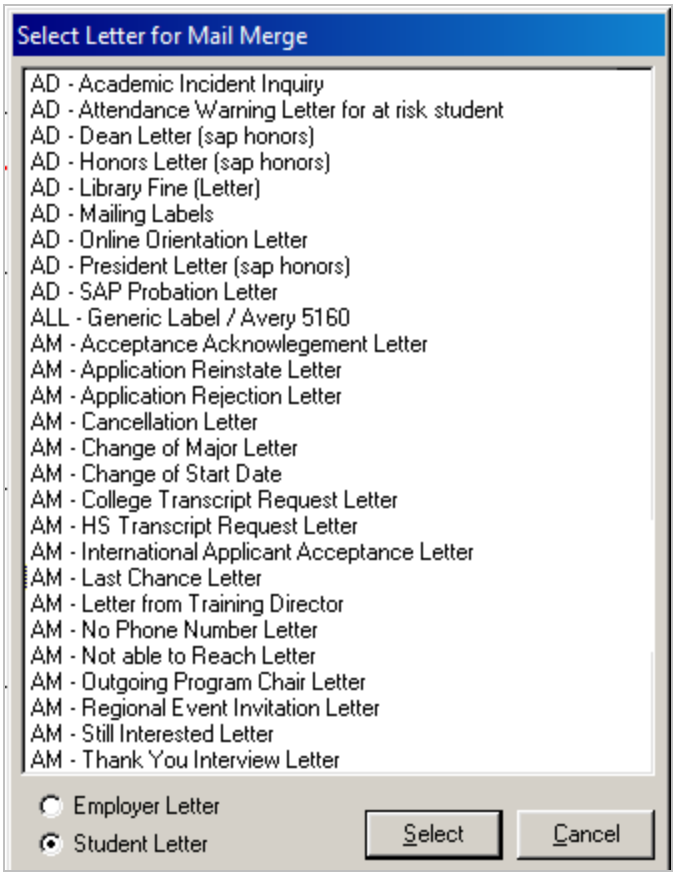
Mail Merge Menu

The Mail Merge option is displayed on the Report Viewer menu bar if the following conditions are met:

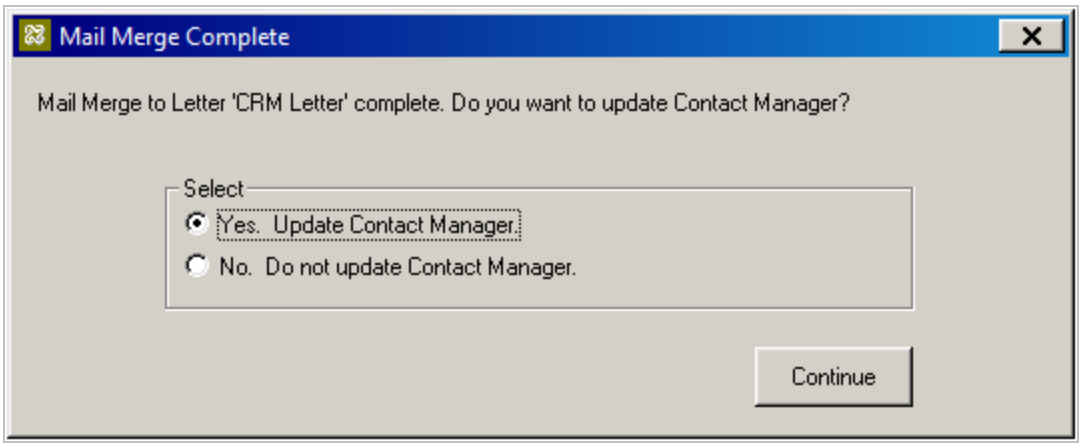
- Your school has letter activities related to students.
- The path to the letters is correctly designated in **Setup > System**.
- The report being previewed lists students.

Mail Merge displays the options for letter activities with which to merge the data on the displayed report.

- Select **Employer Letter** or **Student Letter**, and click **Select** to continue processing.



- Confirm that you want to merge the records from the report with the letter you selected.
- You can also update the student's activity record after processing the letter. The system asks if you want to update the Contact Manager. If you select **Yes**, the student's Contact Manager history is updated upon successful completion of the Mail Merge from the report.

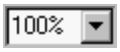


Excel Menu

This option exports the report data to an Excel spreadsheet. The export procedure uses column names as headings. A maximum of 65,000 rows can be exported. Sub-reports are not exported.

Report Viewer Controls

The Report Viewer provides the following controls:

- **Report Views**: Double-click a report heading or sub-heading to open a view containing only that heading and the data below it. A tab is displayed at the top of the report. You can alternate between views. You can also print only a selected view of the report.
- **Close Current View**: Click on the view to be closed and then click to close it.
- **Group Tree**: The left side of the Report Viewer is a control known as the Group Tree. It is used to drill down to specific report section. Click on the plus and minus boxes beside the group names to expand or collapse the tree list. Click on a tree item to go to that portion of the report.
- **Toggle Group Tree**: Use this tool to show or hide the Group Tree.
- **Zoom**: Use the zoom tool 

to size the image of the report to a convenient viewing size. You can select or type a percentage value.
- **Search**: Type text in the search box and click the binoculars to find text in the report preview. Click the binoculars again to find the next occurrence, and so on. Search entries are saved so that you can reuse them by clicking the arrow beside the text box. When you close the report, the search entries are discarded.
- **Page Navigation**: You can go to the first, next, previous, and last page of a multi-page report.

Working with Cube Reports

Each CampusNexus Student module has one or more cube reports associated with it. A cube reports is a multidimensional report that can accommodate three or more dimensions in a presentation. An ordinary spreadsheet is two-dimensional.

Data elements for a cube report are provided in a form that you can readily use. Cube reports provide capabilities for drilling down from summary level reports to details. You can also move data around on the report, add or remove horizontal and vertical data elements to achieve the precise combination of rows and columns to present the results.

Data for a cube report is gathered each time the report is opened. The data is stored in a temporary file while the cube is open. For large databases this data gathering effort can take time.

Cube report output can be generated in four forms:

- On-screen displays in which rows and columns can be rearranged to suit you needs
- Printed spreadsheets with optional horizontal and vertical cross-footed totals
- Charts and graphs
- Microsoft Excel files

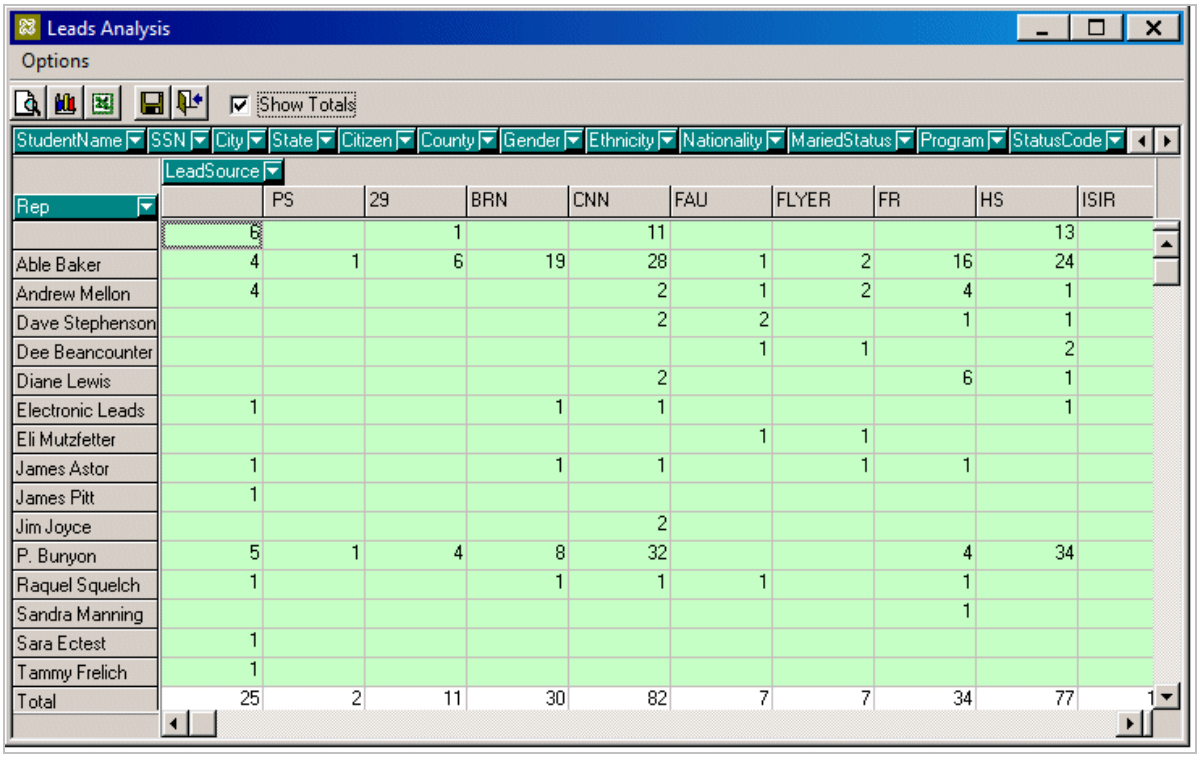
The cube reporting feature in CampusNexus Student can eliminate the need for customized reports. Even if you cannot get the combinations of data you need from a single cube, you can export data from multiple cubes to Excel spreadsheets.

To view a sample cube report:

1. Navigate to **Reports** > **Admissions** > **Leads Analysis**. The Report Selection form is displayed.

   Note: Cube reports are listed at the bottom of each departmental reports menu.

2. If the Report Selection form contains selection criteria for the report, select appropriate criteria.
3. Click **Preview** on the Report Selection form to start the gathering of data for the cube report. Be patient. This can take a while.
4. When the necessary data are assembled, the cube report form is displayed and you can work with the report.

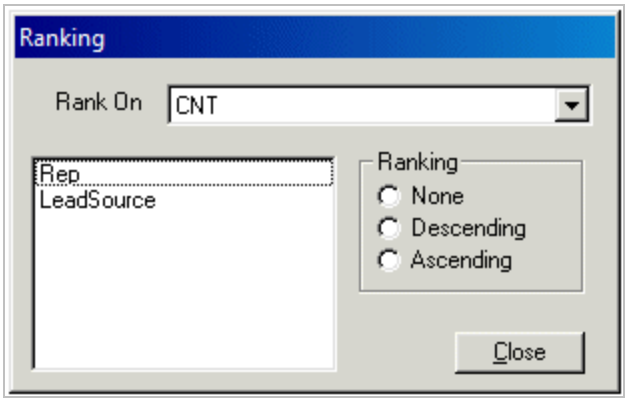


The cube report form contains the following controls:

- Print Preview – Shows a preview of the printed report in spreadsheet format.
- Graph – Opens the graph design feature.

  Note: Before you click **Graph**, you must select the cells you want to include in the graph.
- Excel – Exports the cube report to an Excel spreadsheet.
- Save – Saves data from the report to various file formats.
- Close Report – Closes the report and returns to the CampusNexus Student work area.
- Show Totals – Check box to indicate whether to include the totals in the report.

The **Options** menu contains the options described above plus the Ranking option which allows you to sort the data presented in the report.

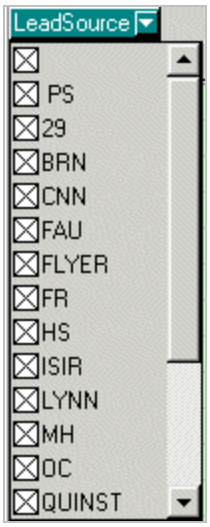


5. You can add data elements to the report.

   The Leads cube report example uses Rep and Lead Source data. You can add data, such as Student Name, SSN, City, State, etc., to the report view by dragging the these elements from the top of the report to the horizontal or vertical axis of the grid.

6. You can select subsets of data elements.

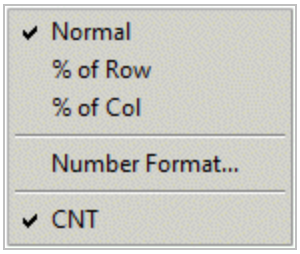
   - Click beside a data element name, e.g., Lead Sources. The list of codes and names drops down for your selection.
   - Click the check boxes to select items to be included in your report. To select all or to deselect all, hold the Ctrl key while selecting items.



7. You can change the data format in the report.

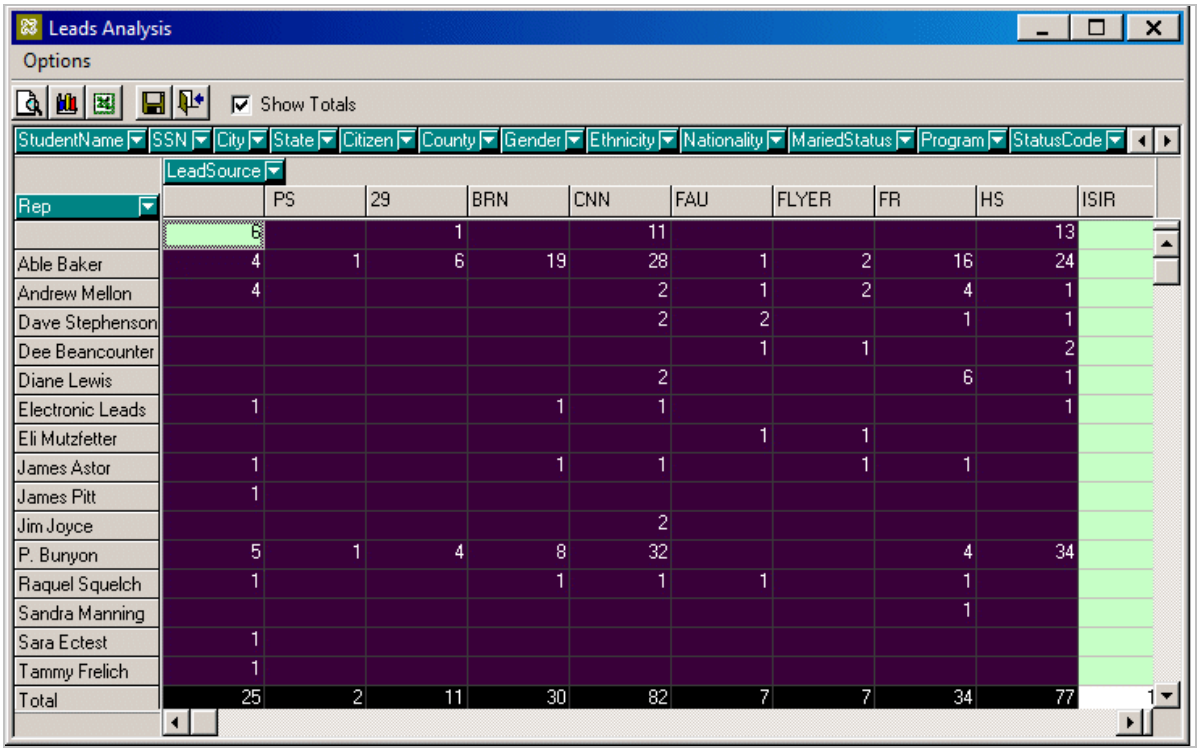
   Right-click anywhere in the data area of the cube report to view a shortcut menu with the following options.

   - Normal – Causes the cube data to be displayed in its normal format. In our example, it is a count of the lead source occurrences.
   - % of Row – Changes the data format to be a percentage of the row total.
   - % of Col – Changes the data format to be a percentage of the column total.
   - Number Format... – Change the format of the numbers in the data cells.
   - CNT – Data element to be displayed. In our example, there is only one element. In other reports, more options may be listed here.



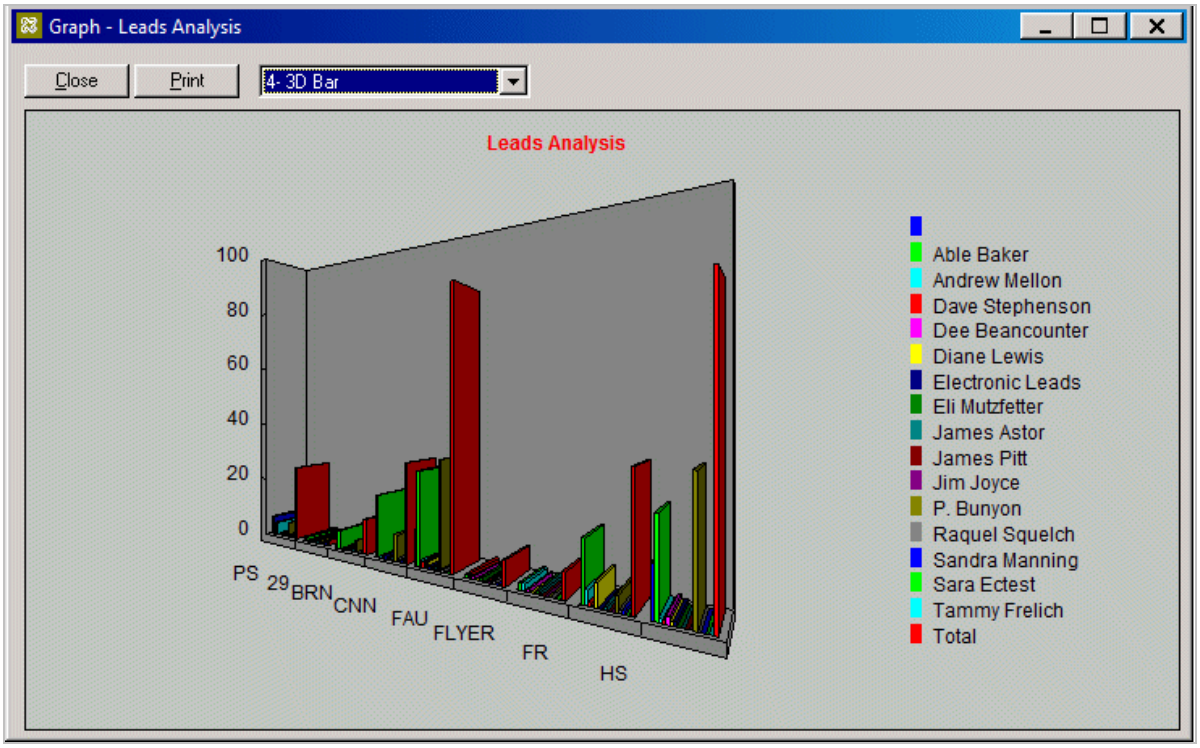
8. You can create a graph.

a. Before creating a graph you must **select cells**. To select cells, click one corner of a data range and drag to the diagonally opposite corner of the range. All selected cells except the first one are darkened.



b. Click the **Graph** button. The Graph form is displayed showing the report data in a graph presentation.

c. To change the graph presentation style, click the graph style drop-down list and select a different style, e.g., 3D bar, 3D area, etc.

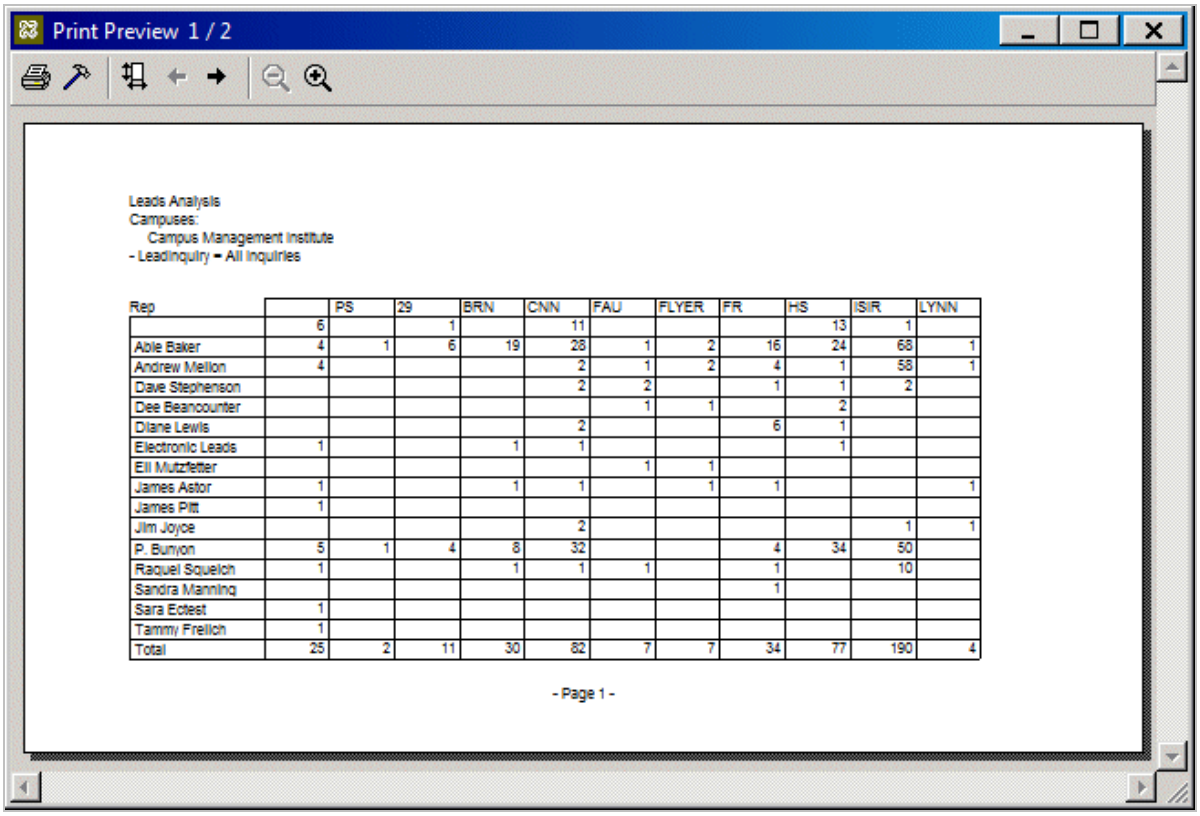


d. To print the graph, click **Print** on the graph form.

e. Click **Close** to close the form. You are returned to the cube report form.

9. You can export the complete report or selected cells to Microsoft Excel.
   - To select cells, click one corner of a data range and drag to the diagonally opposite corner of the range.
   - To export the data to Excel, click the **Excel** button.
10. You can preview a print version of the cube report form.
    - Click the **Print Preview** button. The Print Preview form is displayed.
    - Use the **Print**, **Print Setup**, **Margins and Columns**, **Page Change**, **Zoom In**, and **Zoom Out** controls on

the Print Preview form as needed.



Leads Analysis
Campuses:
Campus Management Institute
- LeadInquiry = All Inquiries

Rep		PS	29	BRN	CNN	FAU	FLYER	FR	HS	ISIR	LYNN
	6		1		11				13	1	
Able Baker	4	1	6	19	28	1	2	16	24	68	1
Andrew Mellon	4				2	1	2	4	1	58	1
Dave Stephenson					2	2		1	1	2	
Dee Beancounter						1	1		2		
Diane Lewis					2			6	1		
Electronic Leads	1			1	1				1		
Eli Mutzfetter						1	1				
James Astor	1			1	1		1	1			1
James Pitt	1										
Jim Joyce					2					1	1
P. Bunyon	5	1	4	8	32			4	34	50	
Raquel Squelch	1			1	1	1		1		10	
Sandra Manning								1			
Sara Ectest	1										
Tammy Frellch	1										
Total	25	2	11	30	82	7	7	34	77	190	4

- Page 1 -

Printing Reports

The print features of CampusNexus Student Reports include:

- The title of the report is in the upper left corner of each page.
- The selection criteria are listed in the upper left corner of the first page.
- The sort order is listed in the upper left corner of the first page.
- The name of the program that produced the report is listed in the upper right corner of the first page.
- The date and time that the report was printed is listed in the upper right corner of each page.
- Column headers are shown at the top of each page.
- Group headers are listed on the left side of the report as required by your sorting criteria.

  You can sort by all the available sort variables. Group totals are available only for the high-order three sort variables.
- The total number of records selected is listed at the end of the report.
- The company name is displayed in the lower left corner of each page. (This is the company name from **Setup > System > General**.)

Note: Reports from your system parameter tables can be printed in a similar manner from the **Lists** menu.

Executive Summary Report

This report provides a comprehensive summary of key business indicators within a school's operation. Listed below are questions answered by the different sections of this report that an upper level manager of a school might ask.

- How much am I spending on advertising, and on which lead sources?
- How many leads are being generated from the different lead sources I am spending advertising dollars on?
- What is my advertising cost per lead generated? Per scheduled start? Per actual start? Which lead sources are most effective?
- What is the overall effectiveness of the admissions reps?
- Which admissions reps are converting the most leads into enrollments?
- Which admissions reps enroll the most students who actually start school?
- Are all of my scheduled start dates in the upcoming year sufficiently booked with scheduled starts?
- Are the students scheduled to start being packaged for financial aid in a timely basis?
- How much cash was received in the past week, month, year? How much cash am I expecting to receive in the upcoming months? What cash was I expecting but have not yet received?
- What is my school population? What percentage of students are withdrawing from school?
- How many students who graduate from my school are finding jobs?

The report consists of 15 sections that can be run as a single report. The sections and associated options are configured using the **Executive Summary Report Setup** form under the **Setup > Executive Summary Report** menu.

The report sections (sorted alphabetically) include:

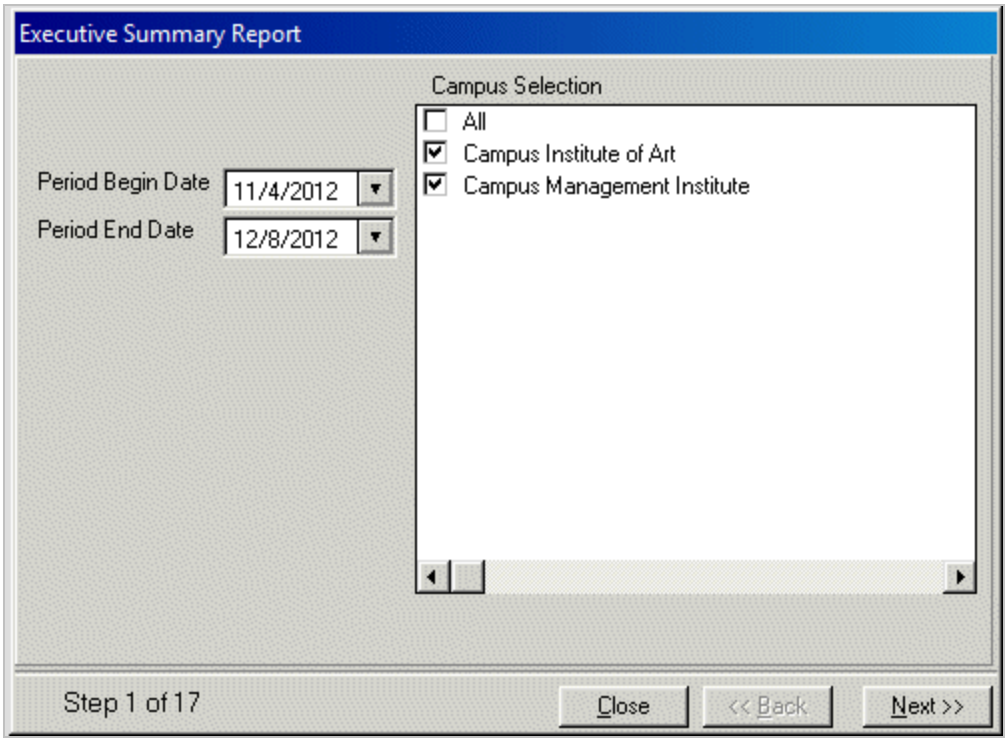
- Booked Futures Summary
- Cash Receipts Summary
- Cost Analysis Breakdown by Lead Category
- Cost Analysis Breakdown by Lead Source
- Expected/Past Due Cash Summary
- FA Packaging Status Summary
- Conversion Breakdown by Admissions Rep - Summary
- Lead Conversion Breakdown by Admissions Rep Type - Summary
- Lead/Enrollment/Start Breakdown by Lead Source
- Lead/Enrollment/Start Breakdown by Lead Source Category
- Placement Summary Section
- Population Analysis Detail
- Population Analysis Summary
- Show Rate Breakdown by Admissions Rep
- Show Rate Breakdown by Admissions Rep Type

The report output is displayed in a Microsoft Excel workbook with a separate worksheet for each report section.

To run the Executive Summary Report:

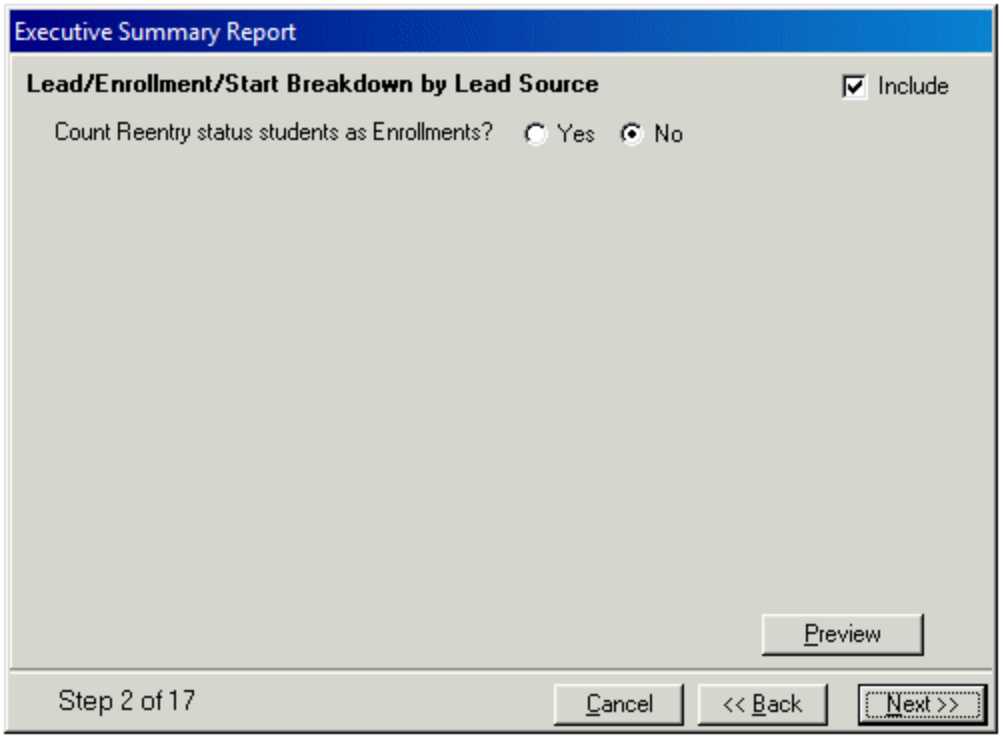
1. Navigate to **Reports > Executive Information > Executive Summary Report**. Step 1 of the Executive Summary Report form is displayed.
2. Select the **Period Begin Date**, **Period End Date**, and the **Campus(es)**.

   Note: Month-to-date (MTD) amounts are the MTD amounts for the Period End Date month only. For example, when specifying filters for the Cash Receipts Summary section, if you enter 10/20/12 as the begin date and 11/20/12 as the ending date, the resulting MTD amounts include all cash receipts from 11/01/12 to 11/20/12 and none from October.



3. Click **Next**. Step 2 of the Executive Summary Report form is displayed. Select appropriate options.

   If you do not want to change the report options, run the complete report by clicking **Preview**. Otherwise, click **Next** and step through the remaining sections of the report.

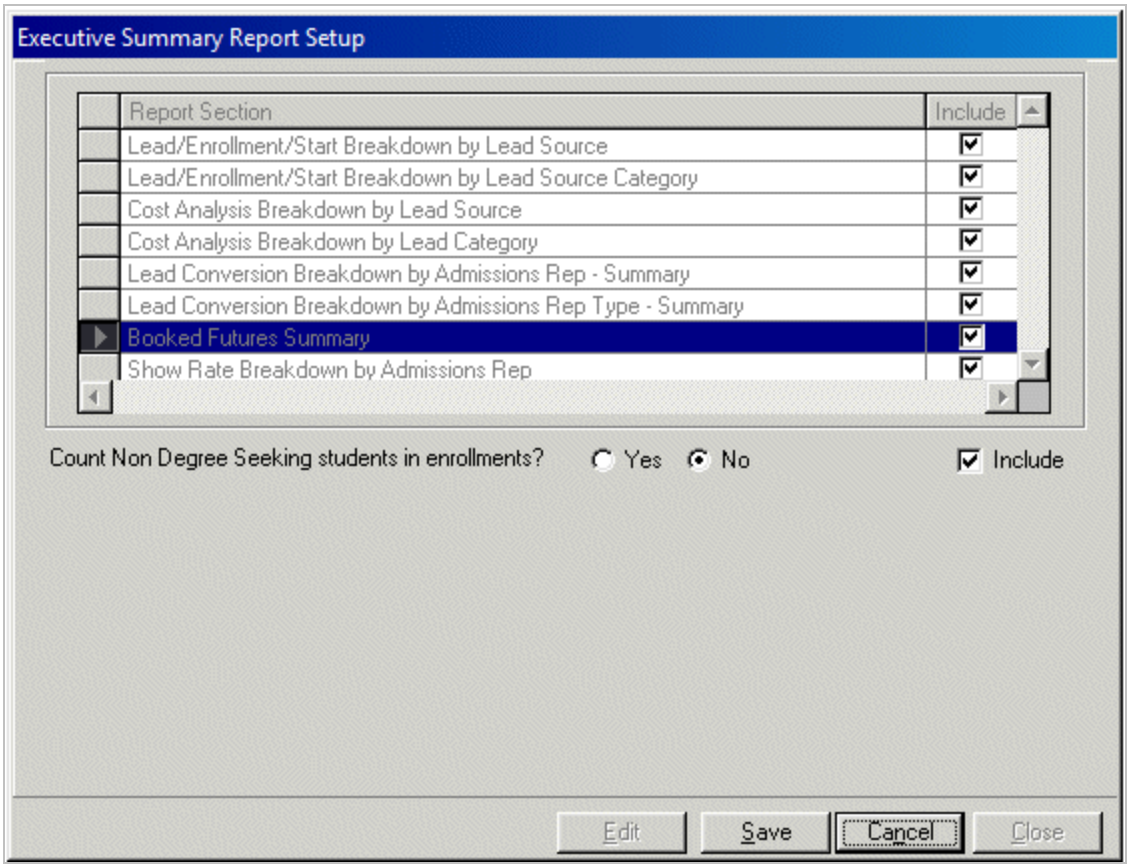


Booked Futures Summary

This section of the Executive Summary Report shows the number of students scheduled to start school each month for the next 13 months. This makes it easy to identify scheduled start dates with low enrollment. Admissions representatives can then target these start dates specifically when enrolling students.

To set up the Booked Futures Summary section:

1. Navigate to **Setup** > **Executive Summary Report**. The Executive Summary Report Setup form is displayed.
2. Select **Booked Futures Summary** and click **Edit**.



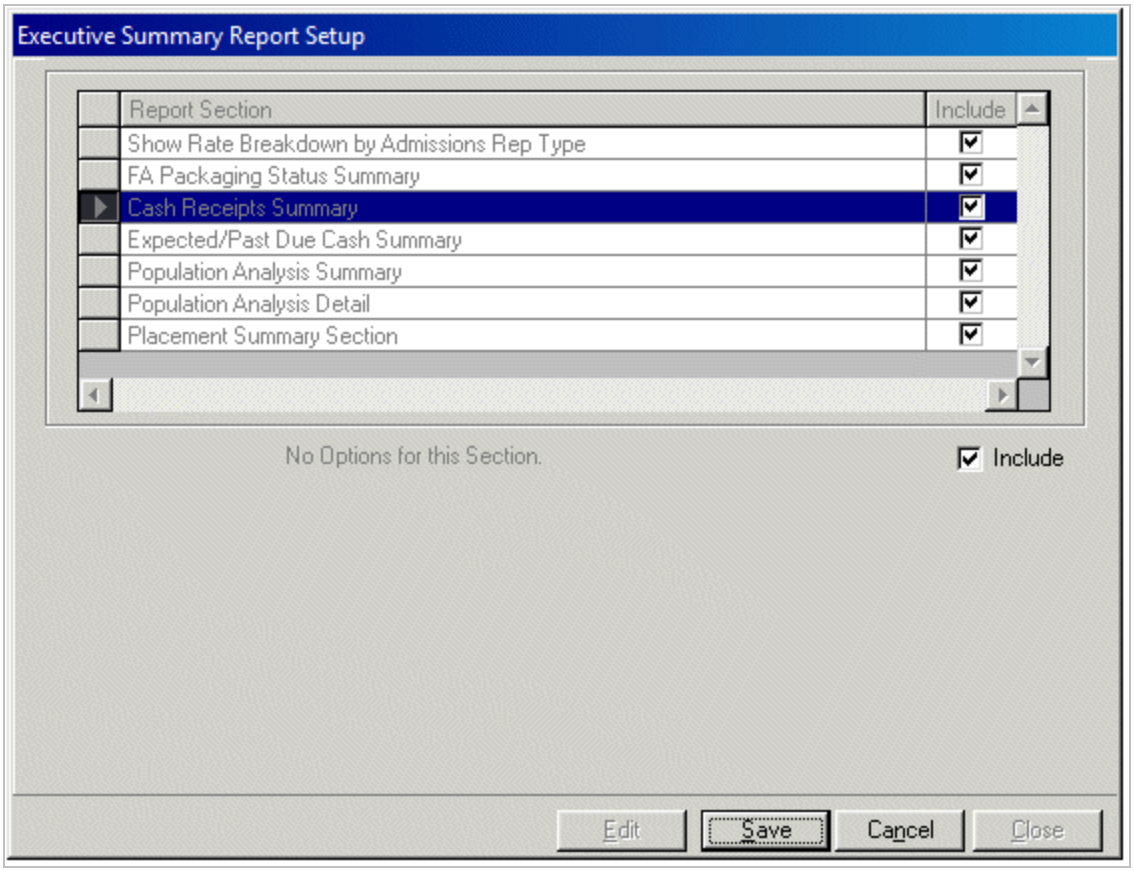
3. Select **Yes** or **No** for the option to 'Count Non Degree Seeking students in enrollments'.
4. Select the **Include** check box if you want this section to be part of the Executive Summary Report.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Cash Receipts Summary

This section of the Executive Summary Report shows the total cash receipts received. The cash receipts are broken out into Title IV and Non-Title IV receipts. This information is critical when evaluating a school's compliance with the 90/10 regulation.

To set up the Cash Receipts Summary section:

1. Navigate to **Setup** > **Executive Summary Report**. The Executive Summary Report Setup form is displayed.
2. Select **Cash Receipts Summary** and click **Edit**.



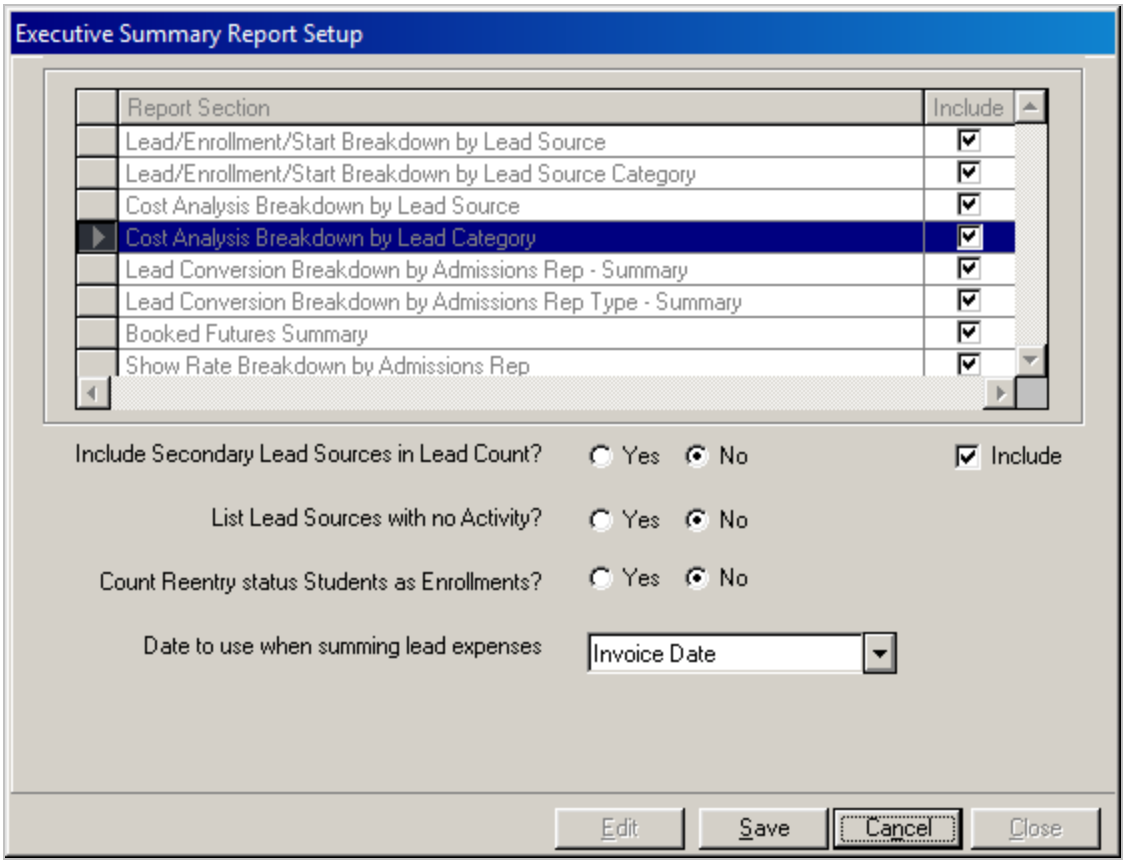
3. Select the **Include** check box if you want this section to be part of the Executive Summary Report.
4. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Cost Analysis Breakdown by Lead Category

This section of the Executive Summary Report report shows the qualitative effectiveness of each lead source. The money spent on advertising month to date and year to date for each lead source is listed. The number of leads, number of enrollments, and number of actual starts are also listed. The cost per lead, cost per enrollment, and cost per actual start can then be computed for each lead source to determine which lead sources are performing the best and which are performing the worst.

To set up the Cost Analysis Breakdown by Lead Category section:

1. Navigate to **Setup** > **Executive Summary Report**. The Executive Summary Report Setup form is displayed.
2. Select **Cost Analysis Breakdown by Lead Category** and click **Edit**.



3. Select **Yes** or **No** to 'Include Secondary Lead Sources in Lead Count'.

   Select **Yes** or **No** to 'List Lead Sources with no Activity'.

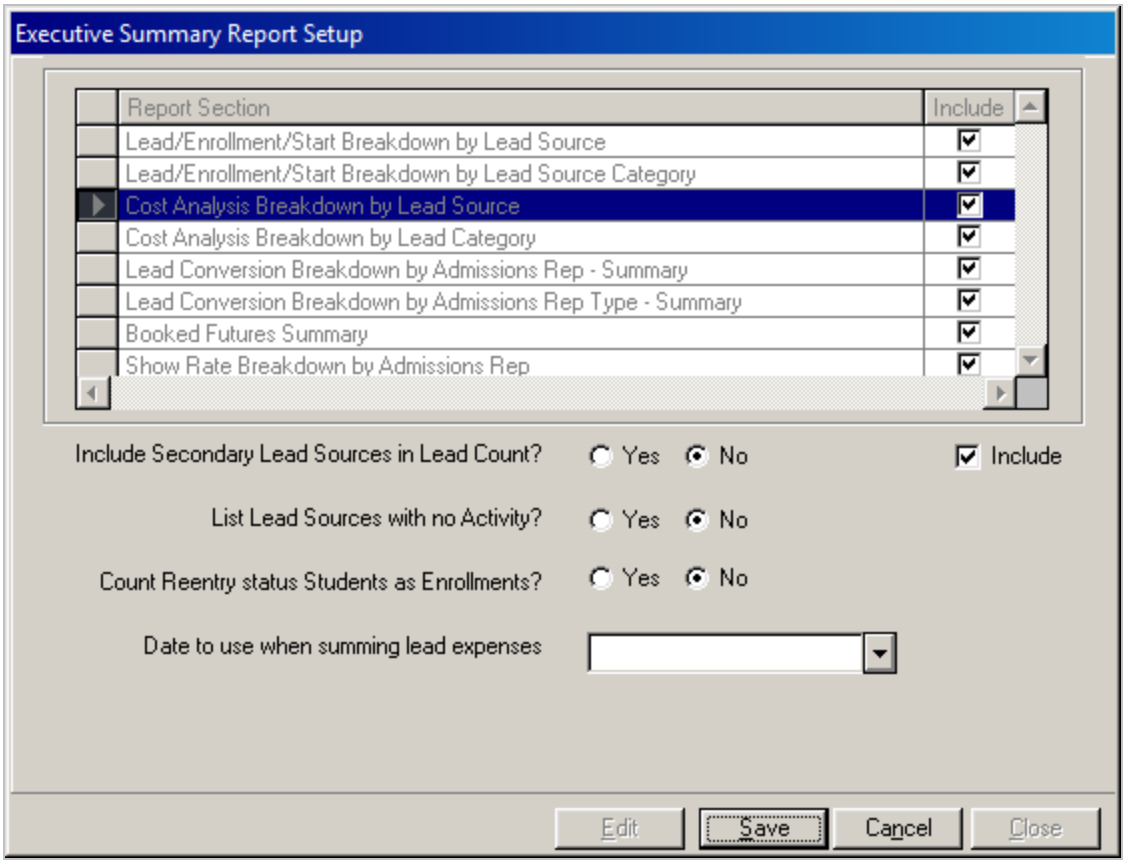
   Select **Yes** or **No** to 'Count Reentry status Students as Enrollments'.
4. Select **Invoice Date** or **Ad Start Date** for the 'Date to use when summing lead expenses'.
5. Select the **Include** check box if you want this section to be part of the Executive Summary Report.
6. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Cost Analysis Breakdown by Lead Source

This section of the Executive Summary Report report shows the qualitative effectiveness of each lead source. The money spent on advertising month to date and year to date for each lead source is listed. The number of leads, number of enrollments, and number of actual starts are also listed. The cost per lead, cost per enrollment, and cost per actual start can then be computed for each lead source.

To set up the Cost Analysis Breakdown by Lead Source section:

1. Navigate to **Setup** > **Executive Summary Report**. The Executive Summary Report Setup form is displayed.
2. Select **Cost Analysis Breakdown by Lead Source** and click **Edit**.



3. Select **Yes** or **No** to 'Include Secondary Lead Sources in Lead Count'.

   Select **Yes** or **No** to 'List Lead Sources with no Activity'.

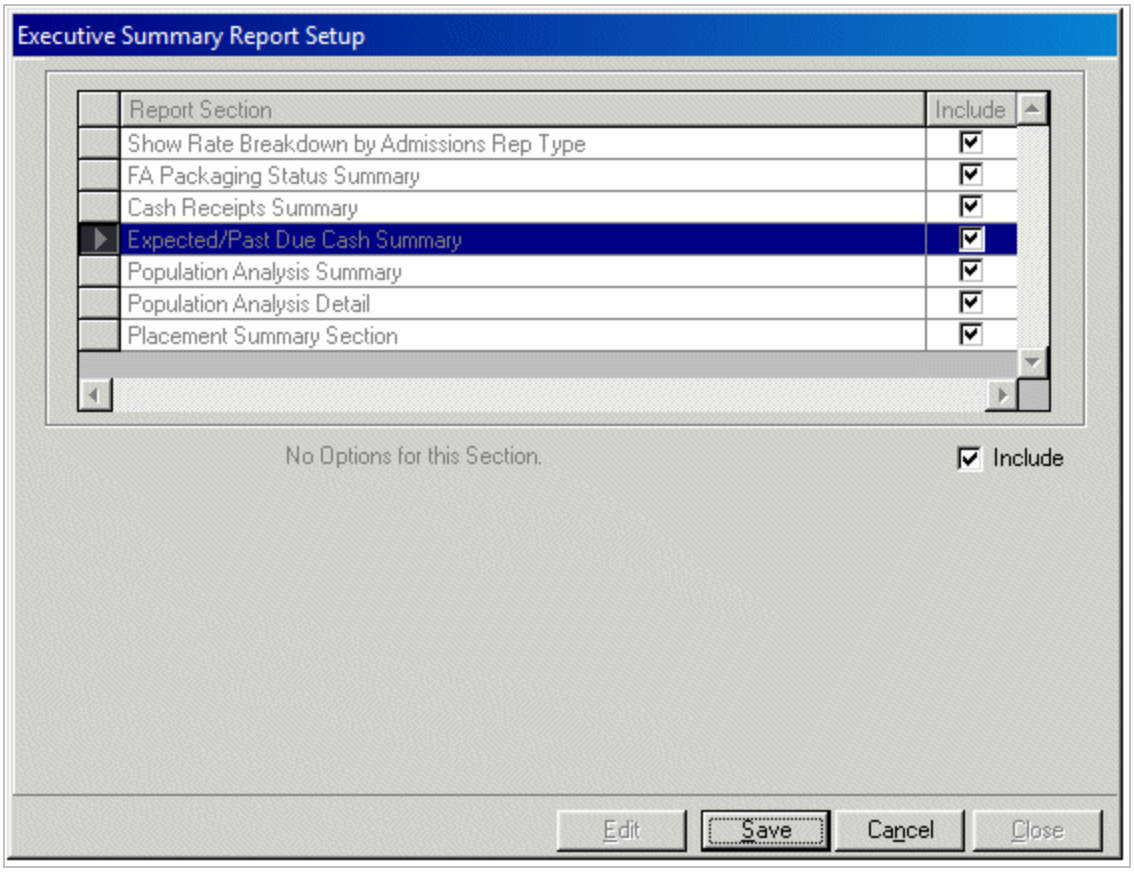
   Select **Yes** or **No** to 'Count Reentry status Students as Enrollments'.
4. Select **Invoice Date** or **Ad Start Date** for the 'Date to use when summing lead expenses'.
5. Select the **Include** check box if you want this section to be part of the Executive Summary Report.
6. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Expected/Past Due Cash Summary

This section of the Executive Summary Report shows the cash that is expected and past due. The report section identifies Title IV and Non-Title IV receipts.

To set up the Expected/Past Due Cash Summary section:

1. Navigate to **Setup** > **Executive Summary Report**. The Executive Summary Report Setup form is displayed.
2. Select **Expected/Past Due Cash Summary** and click **Edit**.



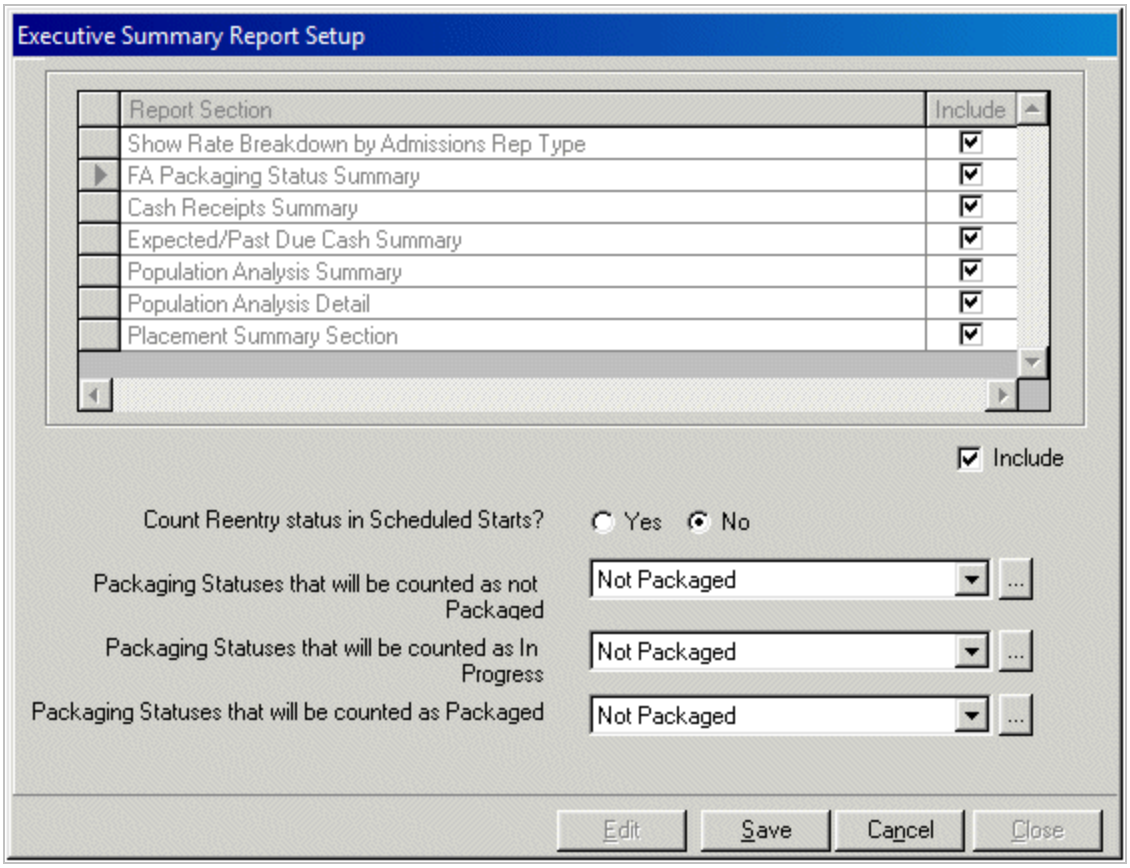
3. Select the **Include** check box if you want this section to be part of the Executive Summary Report.
4. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

FA Packaging Status Summary

This section of the Executive Summary Report shows packaging information for students scheduled to start each month for the next 12 months and beyond. Each scheduled start is classified as being packaged, not packaged, or in progress.

To set up the FA Packaging Status Summary section:

1. Navigate to **Setup** > **Executive Summary Report**. The Executive Summary Report Setup form is displayed.
2. Select **FA Packaging Status Summary** and click **Edit**.



3. Select **Yes** or **No** to 'Count Reentry status in Scheduled Starts'.
4. Use the drop-down lists to select the appropriate statuses for the following fields:
   - Packaging Statuses that will be counted as not Packaged
   - Packaging Statuses that will be counted as in Progress
   - Packaging Statuses that will be counted as Packaged

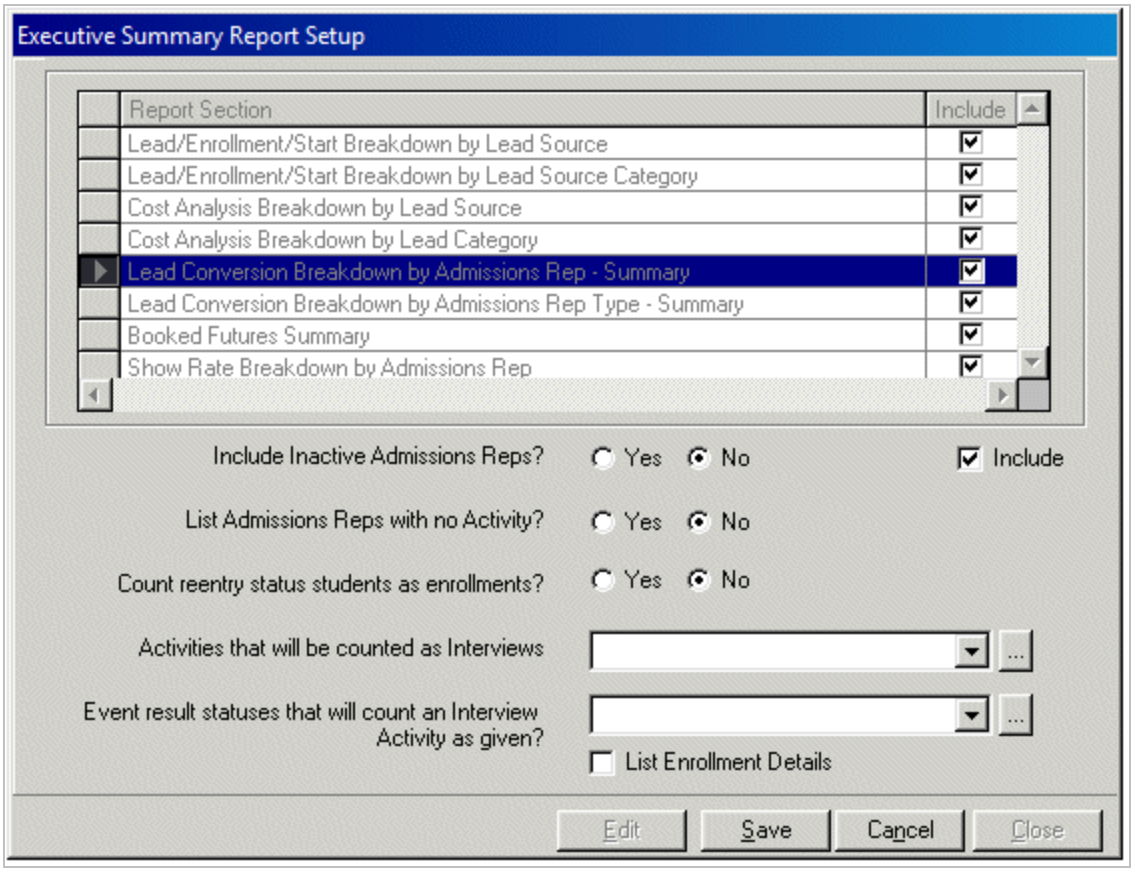
   To select multiple options, click ... and select the appropriate check boxes.
5. Select the **Include** check box if you want this section to be part of the Executive Summary Report.
6. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Lead Conversion Breakdown by Admissions Rep - Summary

This section of the Executive Summary Report shows the effectiveness of each admissions representative and the overall effectiveness of the admissions department. The report section lists the number of leads assigned to each representative. It also lists the number of enrollments and actual starts which show the percentage of leads each representative is converting into enrollments for the school.

To set up the Lead Conversion Breakdown by Admissions Rep - Summary section:

1. Navigate to **Setup** > **Executive Summary Report**. The Executive Summary Report Setup form is displayed.
2. Select **Lead Conversion Breakdown by Admissions Rep - Summary** and click **Edit**.



3. Select **Yes** or **No** to 'Include Inactive Admissions Reps'.

   Select **Yes** or **No** to 'List Admissions Reps with no Activity'.

   Select **Yes** or **No** to 'Count reentry status students as enrollments'.

4. Use the drop-down lists to select the appropriate statuses for the following fields:

   - Activities that will be counted as Interviews
   - Event result statuses that will count an Interview Activity as given

   To select multiple options, click ... and select the appropriate check boxes.

5. Select **List Enrollment Details** to include the enrollment details in the report.

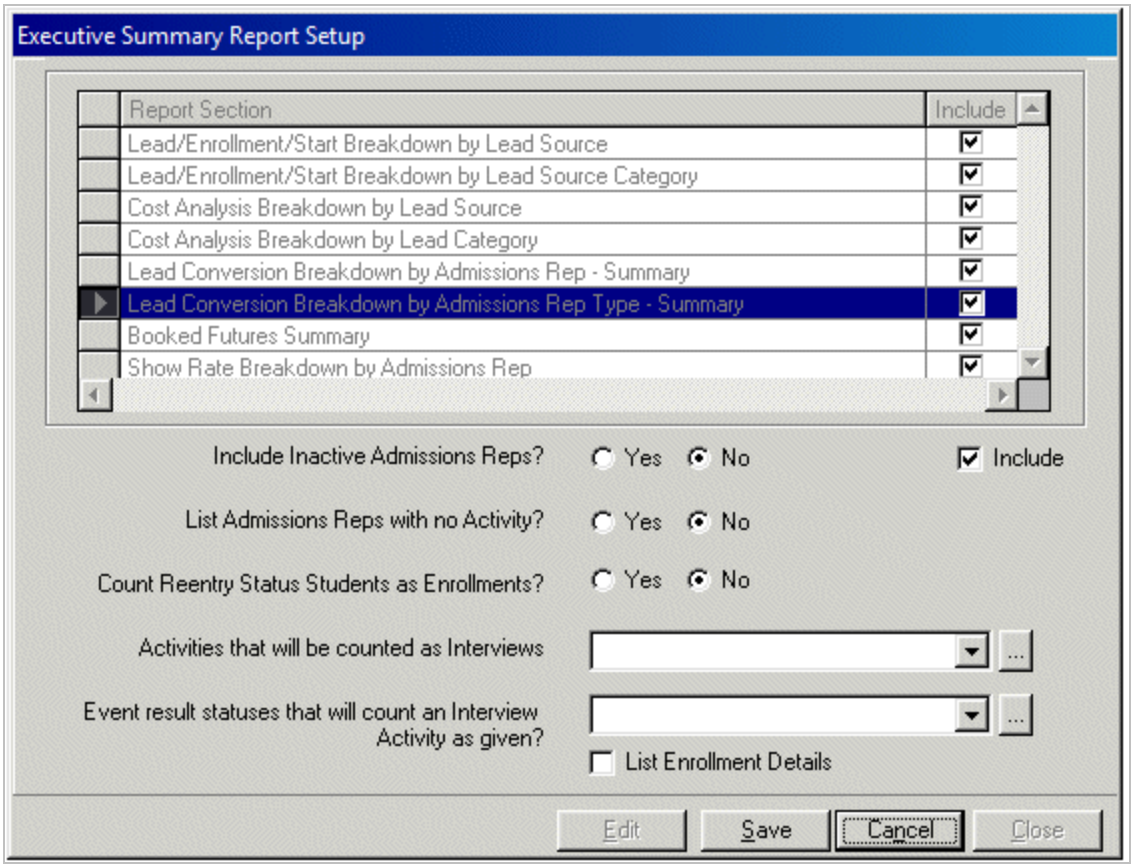
6. Select the **Include** check box if you want this section to be part of the Executive Summary Report.
7. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Lead Conversion Breakdown by Admissions Rep Type - Summary

This section of the Executive Summary Report provides the same output as the Lead Conversion Breakdown by Admissions Rep - Summary section, in addition it totals the numbers for each admissions rep type. Similar to lead source categories, admissions rep types are categories for which the admissions reps are categorized.

To set up the Lead Conversion Breakdown by Admissions Rep Type - Summary section:

1. Navigate to **Setup** > **Executive Summary Report**. The Executive Summary Report Setup form is displayed.
2. Select **Lead Conversion Breakdown by Admissions Rep Type - Summary** and click **Edit**.



3. Select **Yes** or **No** to 'Include Inactive Admissions Reps'.

   Select **Yes** or **No** to 'List Admissions Reps with no Activity'.

   Select **Yes** or **No** to 'Count Reentry Status Students as Enrollments'.
4. Use the drop-down lists to select the appropriate statuses for the following fields:

   - Activities that will be counted as Interviews
   - Event result statuses that will count an Interview Activity as given

   To select multiple options, click ... and select the appropriate check boxes.
5. Select **List Enrollment Details** to include the enrollment details in the report.

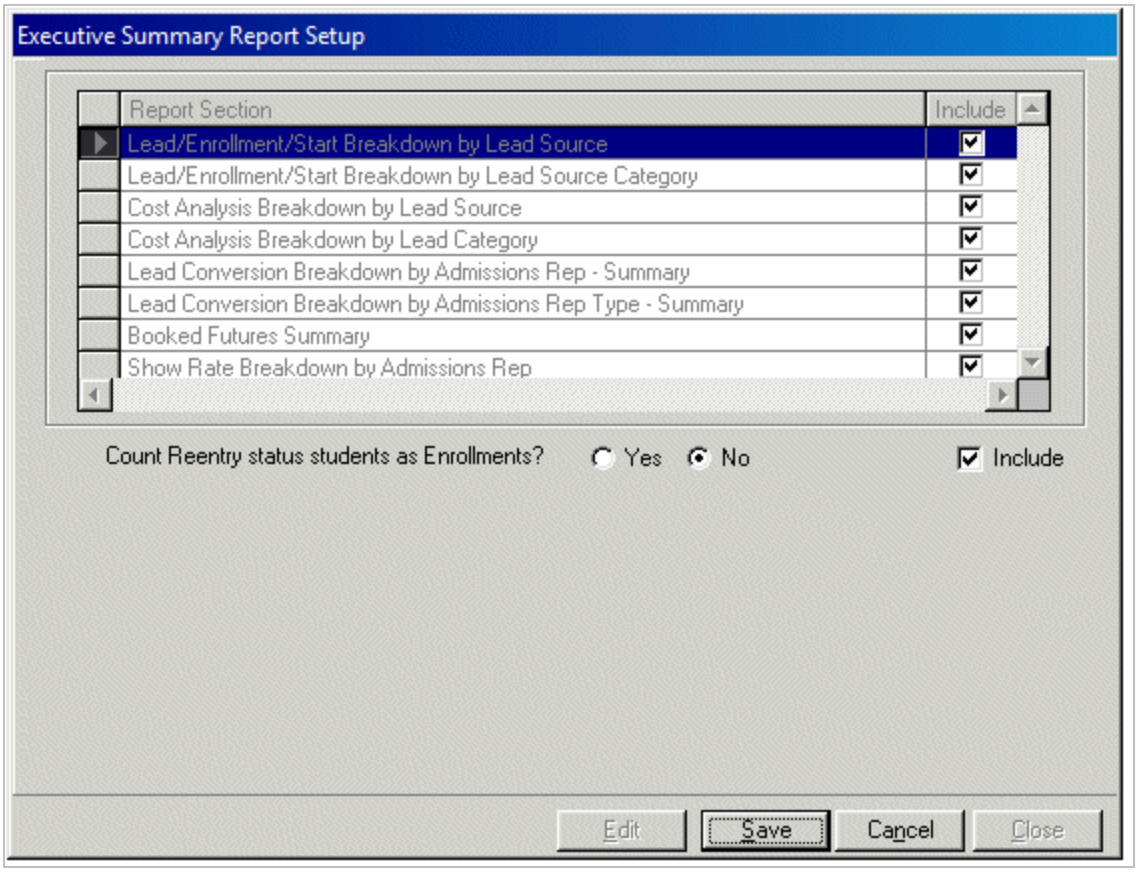
6. Select the **Include** check box if you want this section to be part of the Executive Summary Report.
7. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Lead/Enrollment/Start Breakdown by Lead Source

This section of the Executive Summary Report provides a quantitative picture of the effectiveness of each lead source. The report section lists the number of leads, number of enrollments, and number of actual starts for each lead source. Totals for the report date range, month to date, and year to date are computed.

To set up the Lead/Enrollment/Start Breakdown by Lead Source section:

1. Navigate to **Setup** > **Executive Summary Report**. The Executive Summary Report Setup form is displayed.
2. Select **Lead/Enrollment/Start Breakdown by Lead Source** and click **Edit**.



3. Select **Yes** or **No** to 'Count Reentry status students as Enrollments'.
4. Select the **Include** check box if you want this section to be part of the Executive Summary Report.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

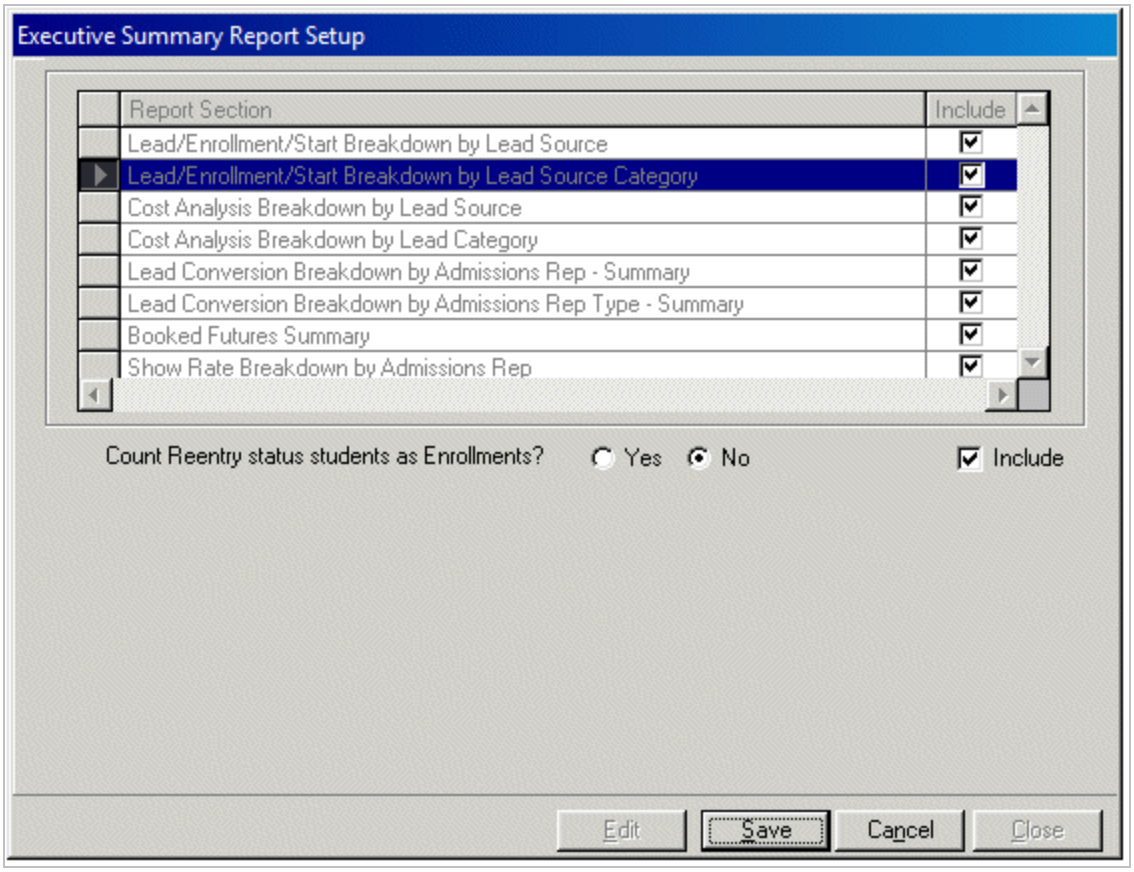
Lead/Enrollment/Start Breakdown by Lead Source Category

This section of the Executive Summary Report provides the same output as the Lead/Enrollment/Start Breakdown by Lead Source section, in addition it lists totals for each lead source category. Multiple lead sources can be categorized into the same category.

For example, a school may advertise on four different radio stations. A lead source would exist for each of the four radio stations for which the school advertises. However, each of those lead sources would have a lead source category of Radio. Data for the four radio station lead sources would be computed and listed on one line in this report.

To set up the Lead/Enrollment/Start Breakdown by Lead Source Category section:

1. Navigate to **Setup** > **Executive Summary Report**. The Executive Summary Report Setup form is displayed.
2. Select **Lead/Enrollment/Start Breakdown by Lead Source Category** and click **Edit**.



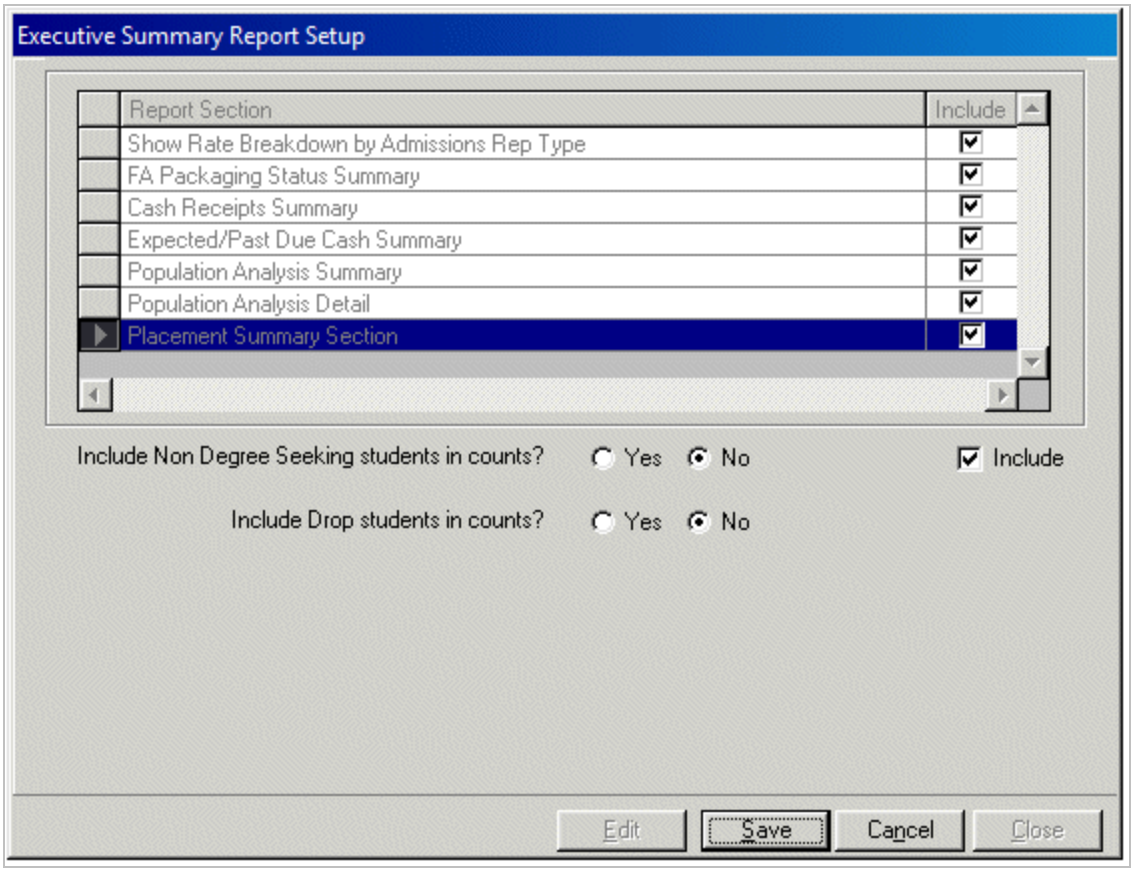
3. Select **Yes** or **No** to 'Count Reentry status students as Enrollments'.
4. Select the **Include** check box if you want this section to be part of the Executive Summary Report.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Placement Summary Section

This section of the Executive Summary Report summarizes data related to placement. The report section lists the number of students who graduated and the number of student that have been placed.

To set up the Placement Summary Section section:

1. Navigate to **Setup** > **Executive Summary Report**. The Executive Summary Report Setup form is displayed.
2. Select **Placement Summary Section** and click **Edit**.



3. Select **Yes** or **No** to 'Include Non Degree Seeking students in counts'.

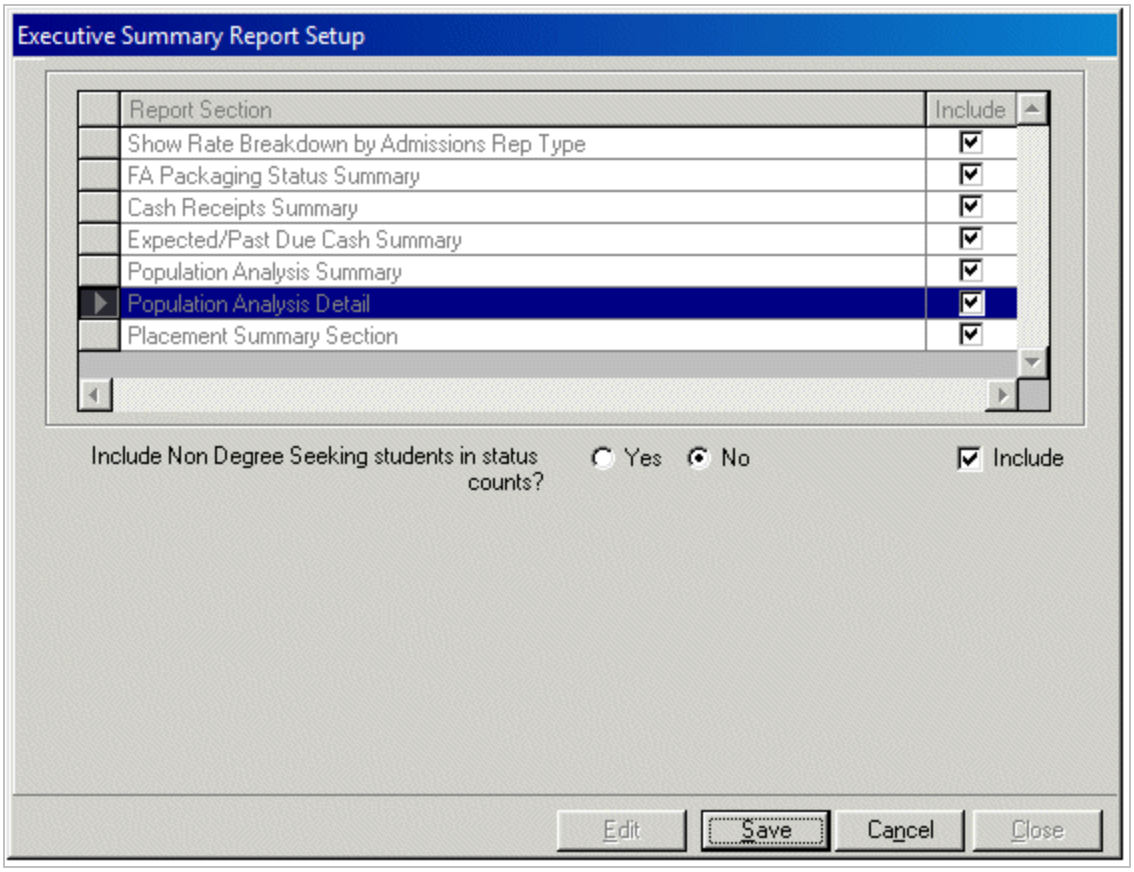
   Select **Yes** or **No** to 'Include Drop students in counts'.
4. Select the **Include** check box if you want this section to be part of the Executive Summary Report.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Population Analysis Detail

This section of the Executive Summary Report shows the student population detail counts.

To set up the Population Analysis Detail section:

1. Navigate to **Setup** > **Executive Summary Report**. The Executive Summary Report Setup form is displayed.
2. Select **Population Analysis Detail** and click **Edit**.



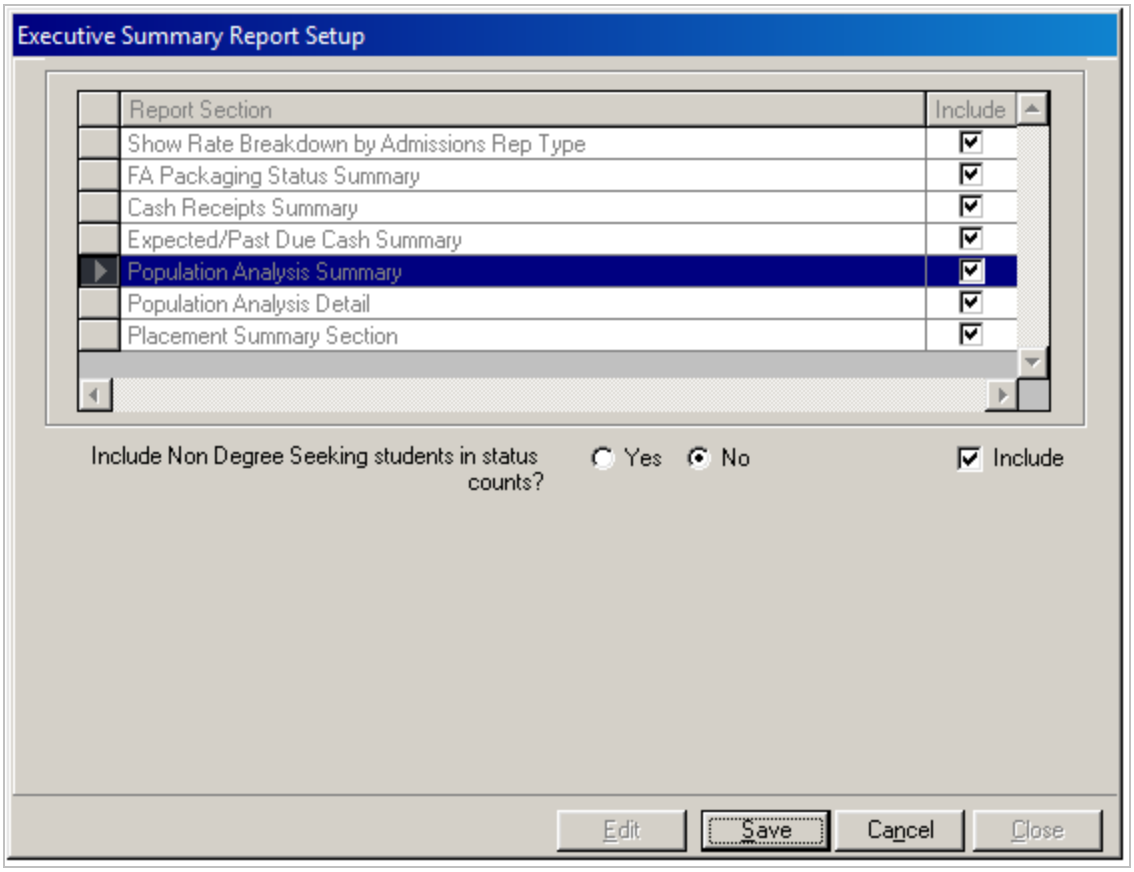
3. Select **Yes** or **No** to 'Include Non Degree Seeking students in status counts'.
4. Select the **Include** check box if you want this section to be part of the Executive Summary Report.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Population Analysis Summary

This section of the Executive Summary Report shows a summary of the school's student population. Key data elements are number of new starts, number of drops, number of grads, and current in school population. A school's retention rate can be calculated from this section of the report.

To set up the Population Analysis Summary section:

1. Navigate to **Setup** > **Executive Summary Report**. The Executive Summary Report Setup form is displayed.
2. Select **Population Analysis Summary** and click **Edit**.



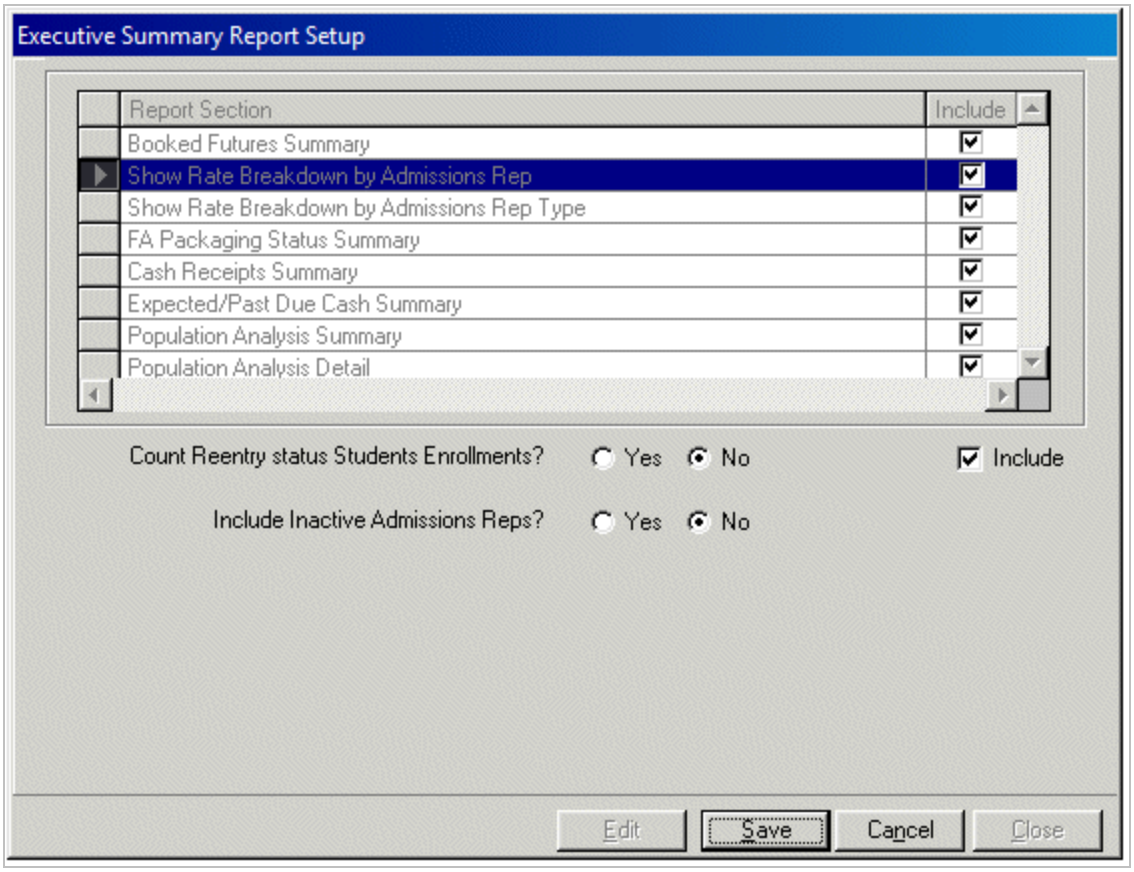
3. Select **Yes** or **No** to 'Include Non Degree Seeking students in status counts'.
4. Select the **Include** check box if you want this section to be part of the Executive Summary Report.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Show Rate Breakdown by Admissions Rep

This section of the Executive Summary Report shows how many students scheduled to start showed up at the school. Totals are listed for each admissions rep. This section identifies reps who can be effective in enrolling students but are not effective in getting the students to actually start school.

To set up the Show Rate Breakdown by Admissions Rep section:

1. Navigate to **Setup** > **Executive Summary Report**. The Executive Summary Report Setup form is displayed.
2. Select **Show Rate Breakdown by Admissions Rep** and click **Edit**.



3. Select **Yes** or **No** to 'Count Reentry status Student Enrollments'.

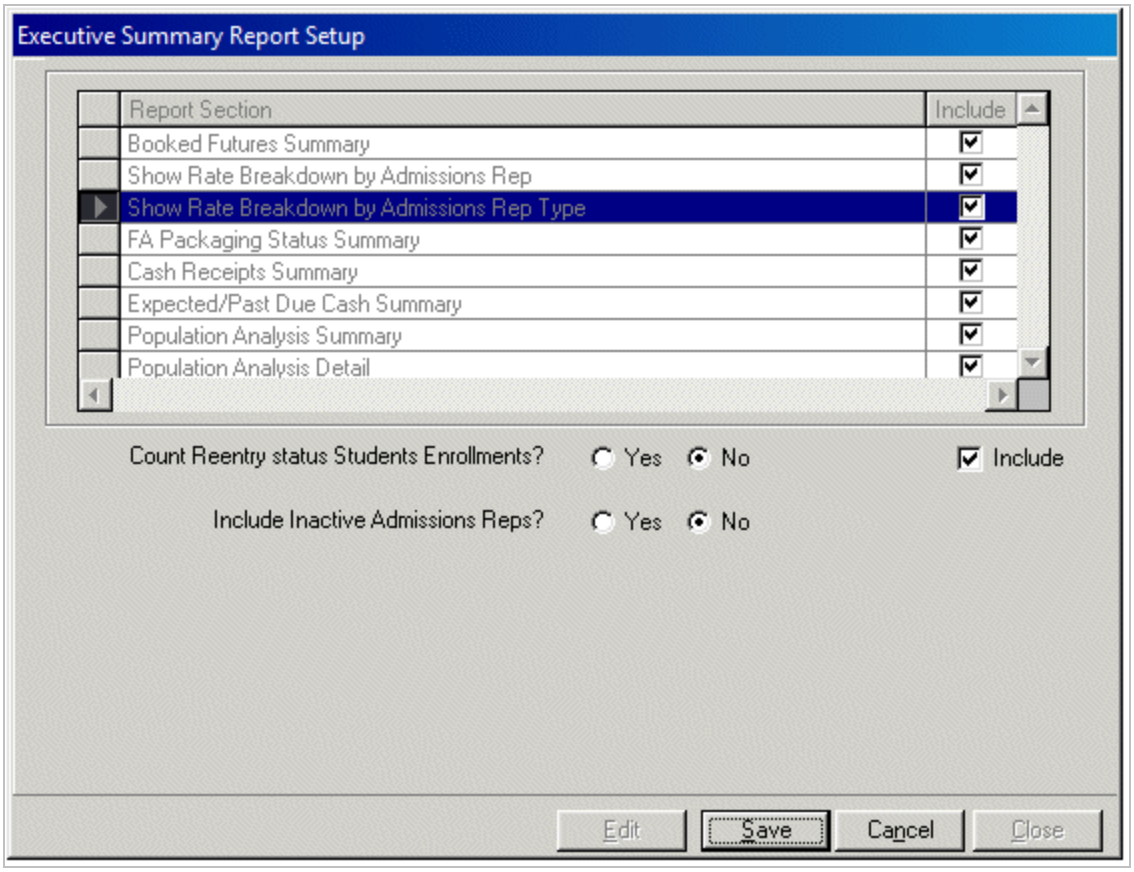
   Select **Yes** or **No** to 'Include Inactive Admissions Reps'.
4. Select the **Include** check box if you want this section to be part of the Executive Summary Report.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Show Rate Breakdown by Admissions Rep Type

This section of the Executive Summary Report provides the same output as the Show Rate breakdown by Admissions Rep section, in addition it totals the numbers for each admissions rep type.

To set up the Show Rate Breakdown by Admissions Rep Type section:

1. Navigate to **Setup** > **Executive Summary Report**. The Executive Summary Report Setup form is displayed.
2. Select **Show Rate Breakdown by Admissions Rep Type** and click **Edit**.



3. Select **Yes** or **No** to 'Count Reentry status Student Enrollments'.

   Select **Yes** or **No** to 'Include Inactive Admissions Reps'.
4. Select the **Include** check box if you want this section to be part of the Executive Summary Report.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Contact Manager Reports

Navigate to **Reports > Contact Manager** to access the following Contact Manager reports:

- Activity Detail
- Do Not Call List
- Do Not Call List (No Phone Number)
- Document Tracking Report
- FERPA Opt-Out Listing
- Incident Details
- Outstanding Transcript Requests
- Permit Document Tracking
- Scan Cover Sheet
- Staff Listing
- Student Activities
- Activity Analysis (cube report)

Navigate to **Reports > Contact Manager > International** to access the following reports for international students:

- Document Tracking
- Enrollment Status Comparison
- Master Student Listing Detail
- Master Student Listing Summary
- SEVIS Export Report
- SEVIS Import Report
- Student Report
- Students with Dependents
- Demographics (cube report)

Note: The System Administrator must set up security rights to view, print, or export reports. Staff members and staff groups must be given security rights to view, print, and/or export reports. This does not apply to custom reports.

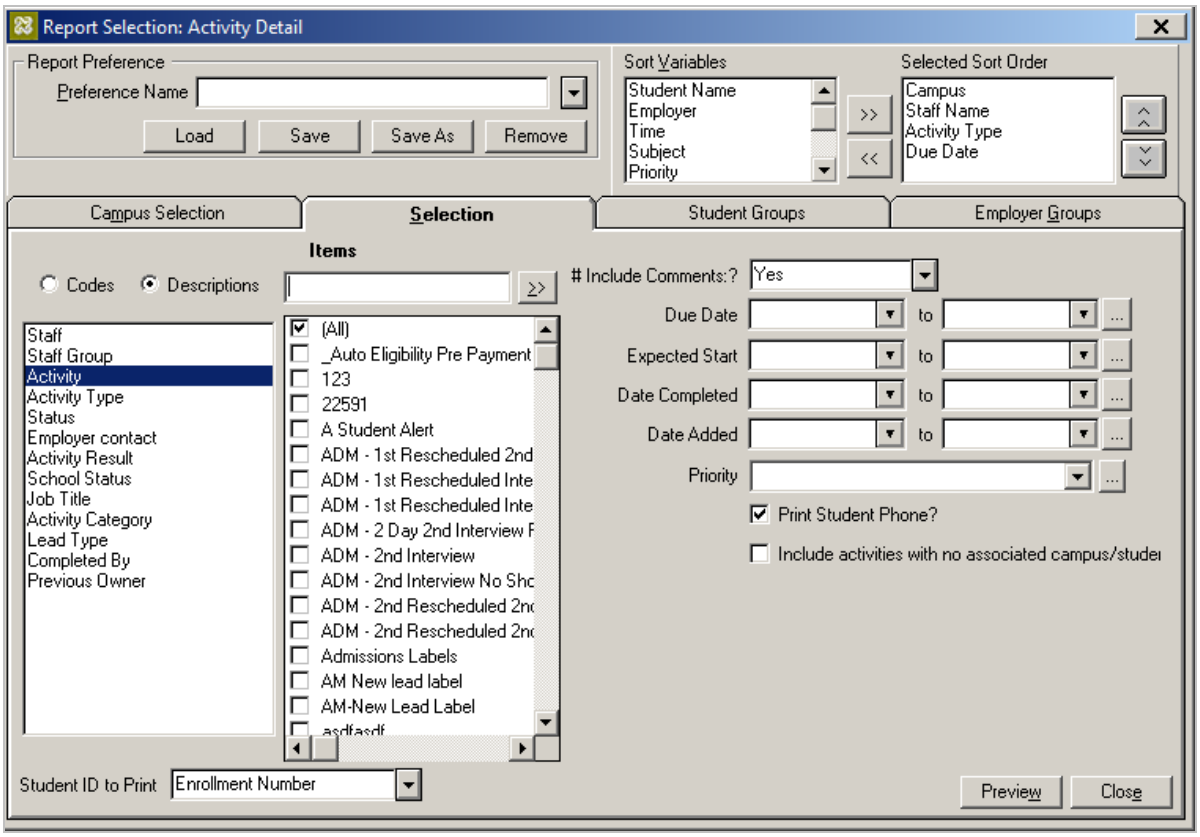
Activity Detail

This report lists details of Contact Manager activities. Associations between activities and activity categories may also appear on this report. For additional information on setting up associations between activities and their categories, see Activity Categories.

Note: If the activity involves sorting by lead type, CampusNexus Student filters results based on lead sources mapped to students in the SyStudent table.

To run the report:

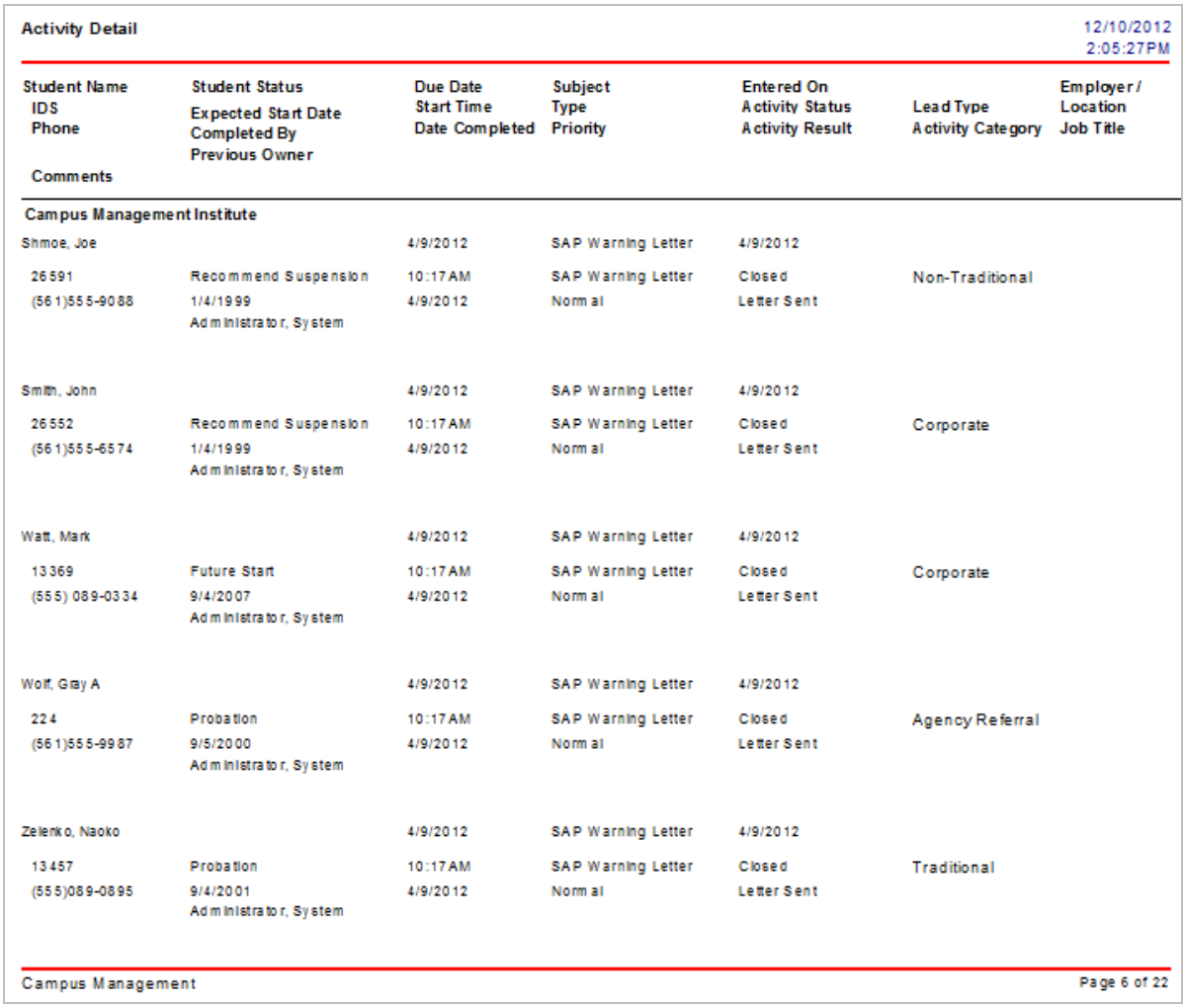
1. Navigate to **Reports > Contact Manager > Activity Detail**. The Report Selection: Activity Detail form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.



Activity Detail 12/10/2012 2:05:27PM

Student Name / IDS / Phone / Comments	Student Status / Expected Start Date / Completed By / Previous Owner	Due Date / Start Time / Date Completed	Subject / Type / Priority	Entered On / Activity Status / Activity Result	Lead Type / Activity Category	Employer / Location / Job Title
Campus Management Institute						
Shmoe, Joe		4/9/2012	SAP Warning Letter	4/9/2012		
26591	Recommend Suspension	10:17AM	SAP Warning Letter	Closed	Non-Traditional	
(561)555-9088	1/4/1999	4/9/2012	Normal	Letter Sent		
	Administrator, System					
Smith, John		4/9/2012	SAP Warning Letter	4/9/2012		
26552	Recommend Suspension	10:17AM	SAP Warning Letter	Closed	Corporate	
(561)555-6574	1/4/1999	4/9/2012	Normal	Letter Sent		
	Administrator, System					
Watt, Mark		4/9/2012	SAP Warning Letter	4/9/2012		
13369	Future Start	10:17AM	SAP Warning Letter	Closed	Corporate	
(555) 089-0334	9/4/2007	4/9/2012	Normal	Letter Sent		
	Administrator, System					
Wolf, Gray A		4/9/2012	SAP Warning Letter	4/9/2012		
224	Probation	10:17AM	SAP Warning Letter	Closed	Agency Referral	
(561)555-9987	9/5/2000	4/9/2012	Normal	Letter Sent		
	Administrator, System					
Zelenko, Naoko		4/9/2012	SAP Warning Letter	4/9/2012		
13457	Probation	10:17AM	SAP Warning Letter	Closed	Traditional	
(555)089-0895	9/4/2001	4/9/2012	Normal	Letter Sent		
	Administrator, System					

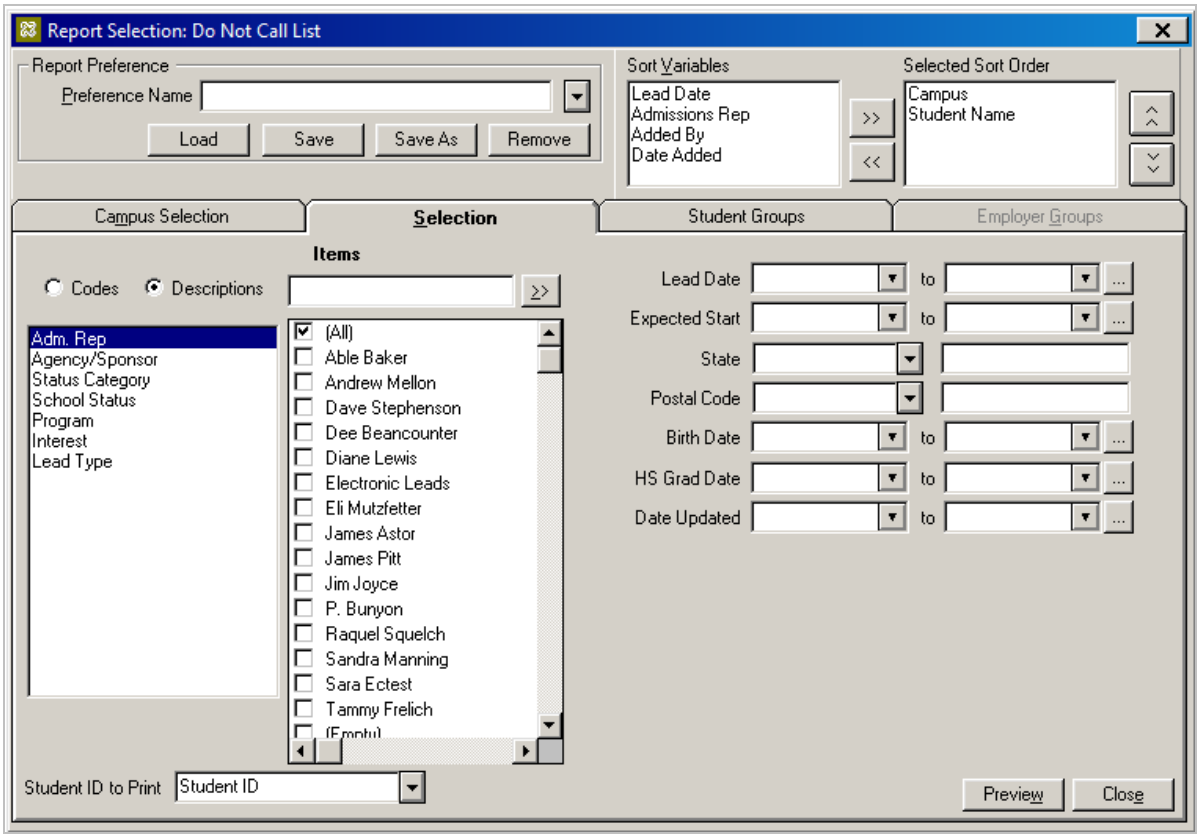
Campus Management Page 6 of 22

Do Not Call List

This report lists all students whose phone numbers were matched and updated by the CampusNexus Student Do Not Call (DNC) Update process (see Updating Phone Numbers). For information about the rules that determine whether phone numbers are displayed or masked in the report, refer to Masking of Phone Numbers.

To run the report:

1. Navigate to **Reports > Contact Manager > Do Not Call List**. The Report Selection: Do Not Call List form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

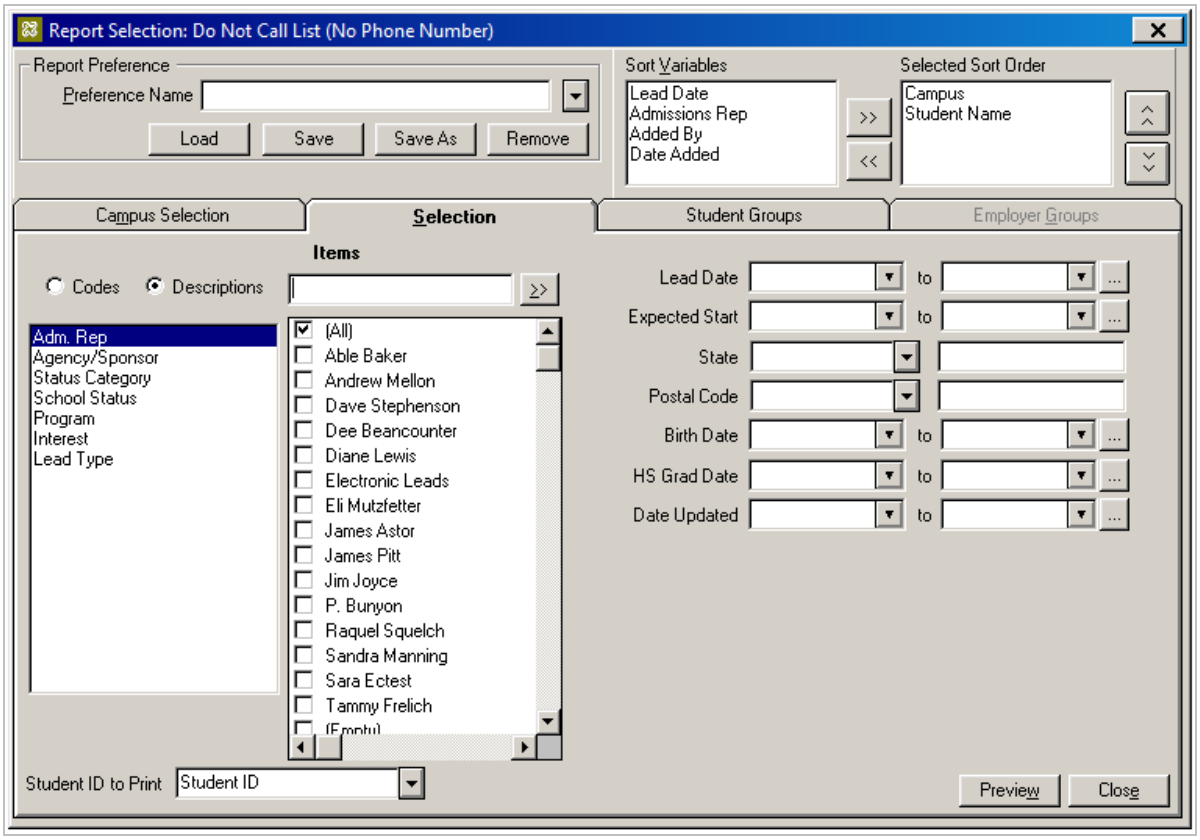
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

Do Not Call List (No Phone Number)

This report lists all students whose phone numbers were matched and updated by the CampusNexus Student Do Not Call (DNC) Update process (see Updating Phone Numbers), however, the phone numbers are masked in the report. For information about the rules that determine whether phone numbers are displayed or masked in the report, refer to Masking of Phone Numbers.

To run the report:

1. Navigate to **Reports > Contact Manager > Do Not Call List (No Phone Number)**. The Report Selection: Do Not Call List (No Phone Number) form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

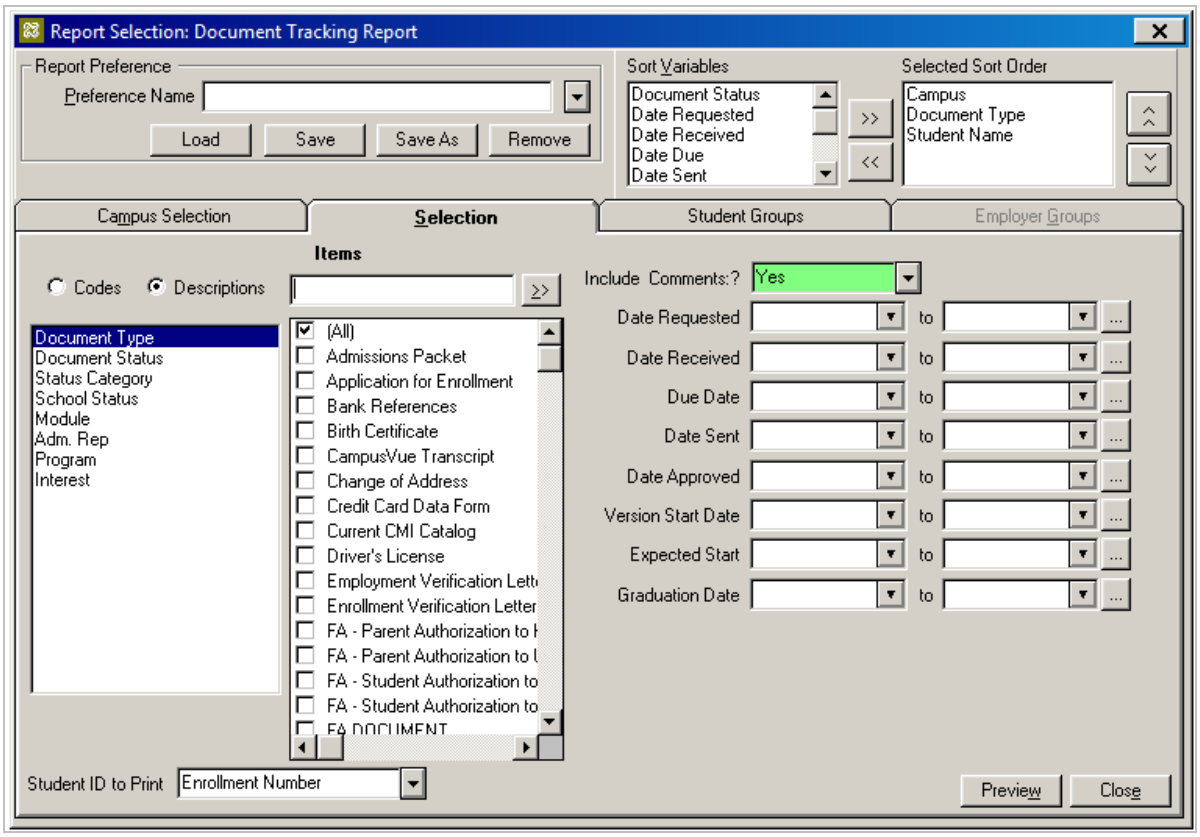
Document Tracking Report

This report lists documents and shows the status of documents for selected campuses, types of documents, and students. The report is applicable in all departments where student-related documents are tracked.

The report uses the Start Date in the student master file only when a record does not exist for the student in the enrollment table. If an enrollment record exists, the report uses the Expected Start Date.

To run the report:

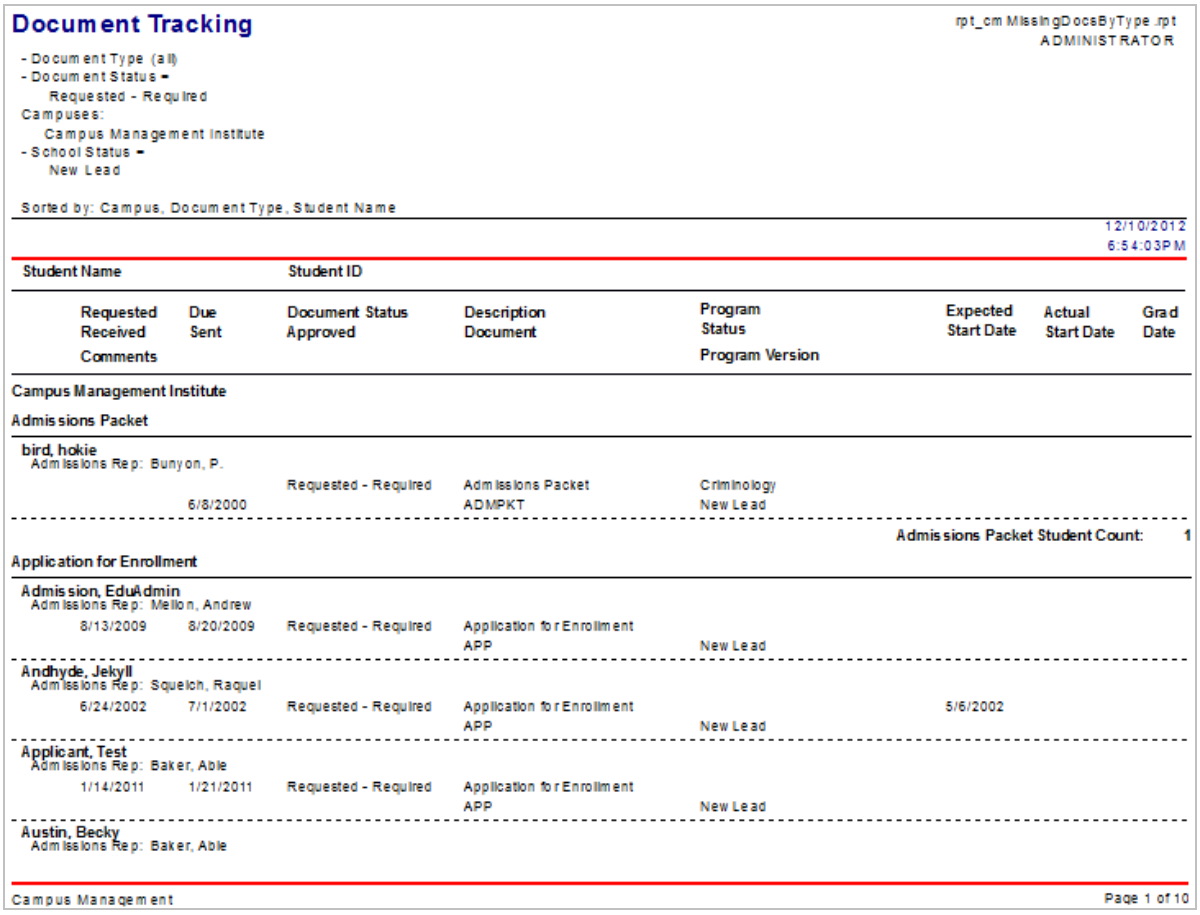
1. Navigate to **Reports > Contact Manager > Document Tracking Report**. The Report Selection: Document Tracking Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.



Document Tracking

rpt_cmMissingDocsByType.rpt
ADMINISTRATOR

- Document Type (all)
- Document Status =
  Requested - Required

Campuses:
Campus Management Institute
- School Status =
  New Lead

Sorted by: Campus, Document Type, Student Name

12/10/2012
6:54:03PM

Student Name	Student ID						
Requested Received Comments	Due Sent	Document Status Approved	Description Document	Program Status Program Version	Expected Start Date	Actual Start Date	Grad Date
Campus Management Institute							
Admissions Packet							
bird, hokie Admissions Rep: Bunyon, P.							
	6/8/2000	Requested - Required	Admissions Packet ADMPKT	Criminology New Lead			
					Admissions Packet Student Count:		**1**
Application for Enrollment							
Admission, EduAdmin Admissions Rep: Mellon, Andrew							
8/13/2009	8/20/2009	Requested - Required	Application for Enrollment APP	 New Lead			
Andhyde, Jekyll Admissions Rep: Squelch, Raquel							
6/24/2002	7/1/2002	Requested - Required	Application for Enrollment APP	 New Lead	5/6/2002		
Applicant, Test Admissions Rep: Baker, Able							
1/14/2011	1/21/2011	Requested - Required	Application for Enrollment APP	 New Lead			
Austin, Becky Admissions Rep: Baker, Able							

Campus Management

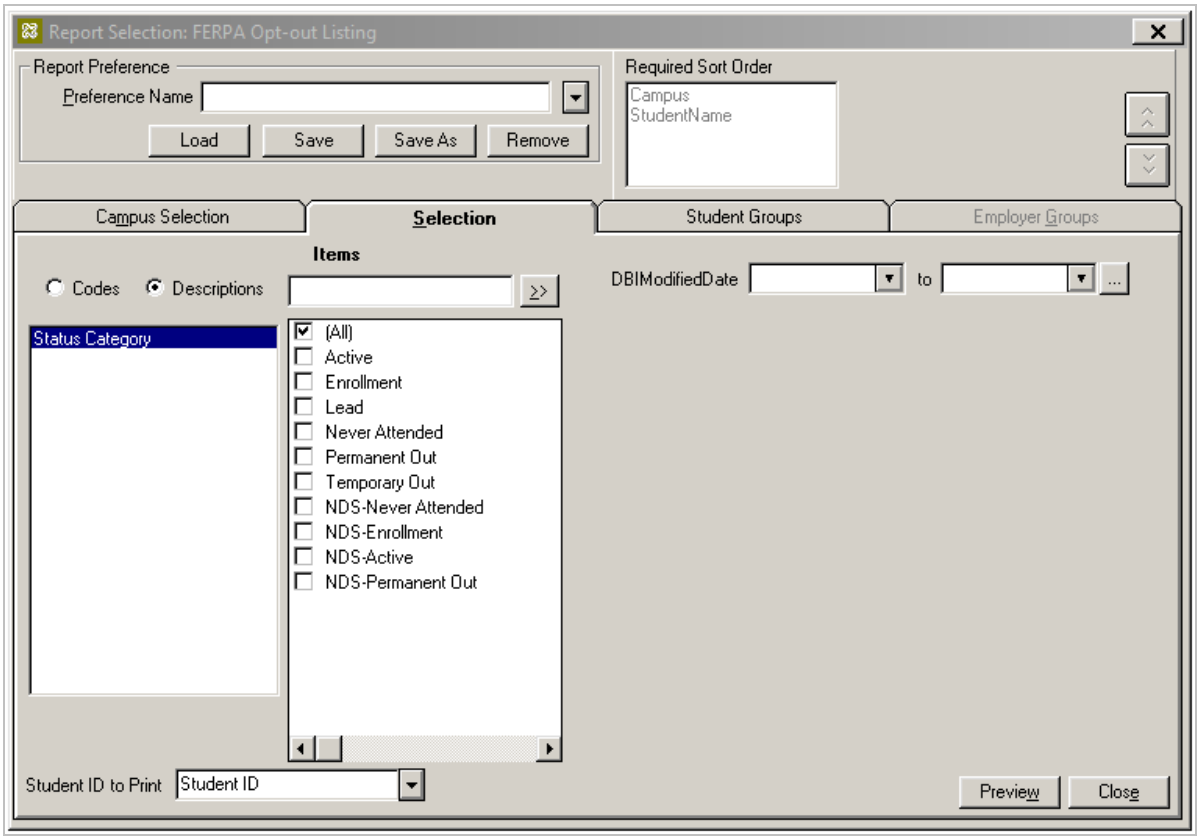
Page 1 of 10

FERPA Opt-out Listing

This report lists the students who elected to block the release of FERPA directory information.

To run the report:

1. Navigate to **Reports > Contact Manager > FERPA Opt-out Listing**. The Report Selection: FERPA Opt-out Listing form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

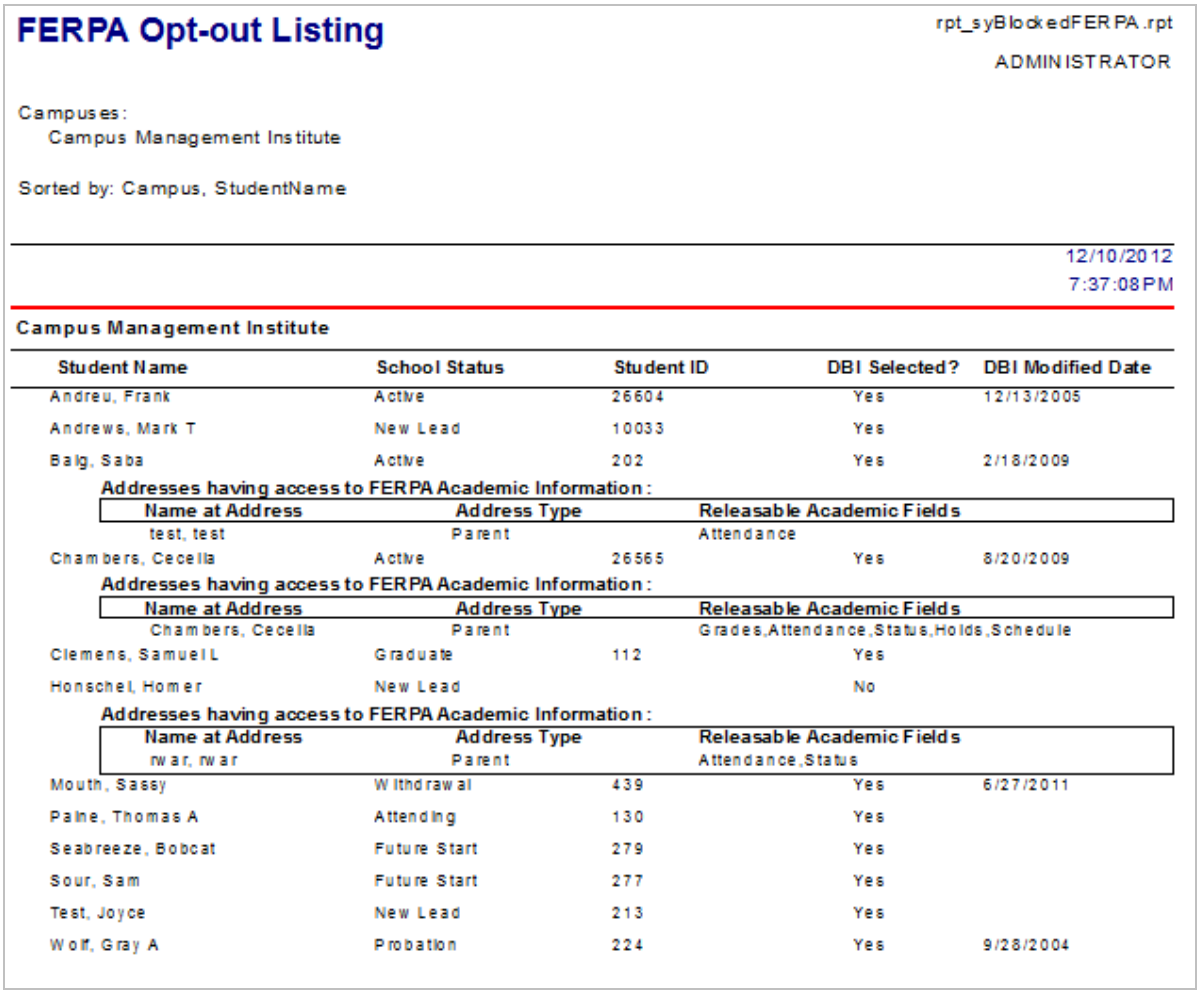


4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report contains the campus, student's name, school status, student ID, Data Block Indicator (DBI) status

(Yes/No), and date when the DBI was last modified.



FERPA Opt-out Listing

rpt_syBlockedFERPA.rpt

ADMINISTRATOR

Campuses:
Campus Management Institute

Sorted by: Campus, StudentName

12/10/2012
7:37:08PM

Campus Management Institute

Student Name	School Status	Student ID	DBI Selected?	DBI Modified Date
Andreu, Frank	Active	26604	Yes	12/13/2005
Andrews, Mark T	New Lead	10033	Yes	
Baig, Saba	Active	202	Yes	2/18/2009
Addresses having access to FERPA Academic Information:				
Name at Address	**Address Type**	**Releasable Academic Fields**		
test, test	Parent	Attendance		
Chambers, Cecelia	Active	26565	Yes	8/20/2009
Addresses having access to FERPA Academic Information:				
Name at Address	**Address Type**	**Releasable Academic Fields**		
Chambers, Cecelia	Parent	Grades,Attendance,Status,Holds,Schedule		
Clemens, Samuel L	Graduate	112	Yes	
Honschel, Homer	New Lead		No	
Addresses having access to FERPA Academic Information:				
Name at Address	**Address Type**	**Releasable Academic Fields**		
rwar, rwar	Parent	Attendance,Status		
Mouth, Sassy	Withdrawal	439	Yes	6/27/2011
Paine, Thomas A	Attending	130	Yes	
Seabreeze, Bobcat	Future Start	279	Yes	
Sour, Sam	Future Start	277	Yes	
Test, Joyce	New Lead	213	Yes	
Wolf, Gray A	Probation	224	Yes	9/28/2004

Incident Details

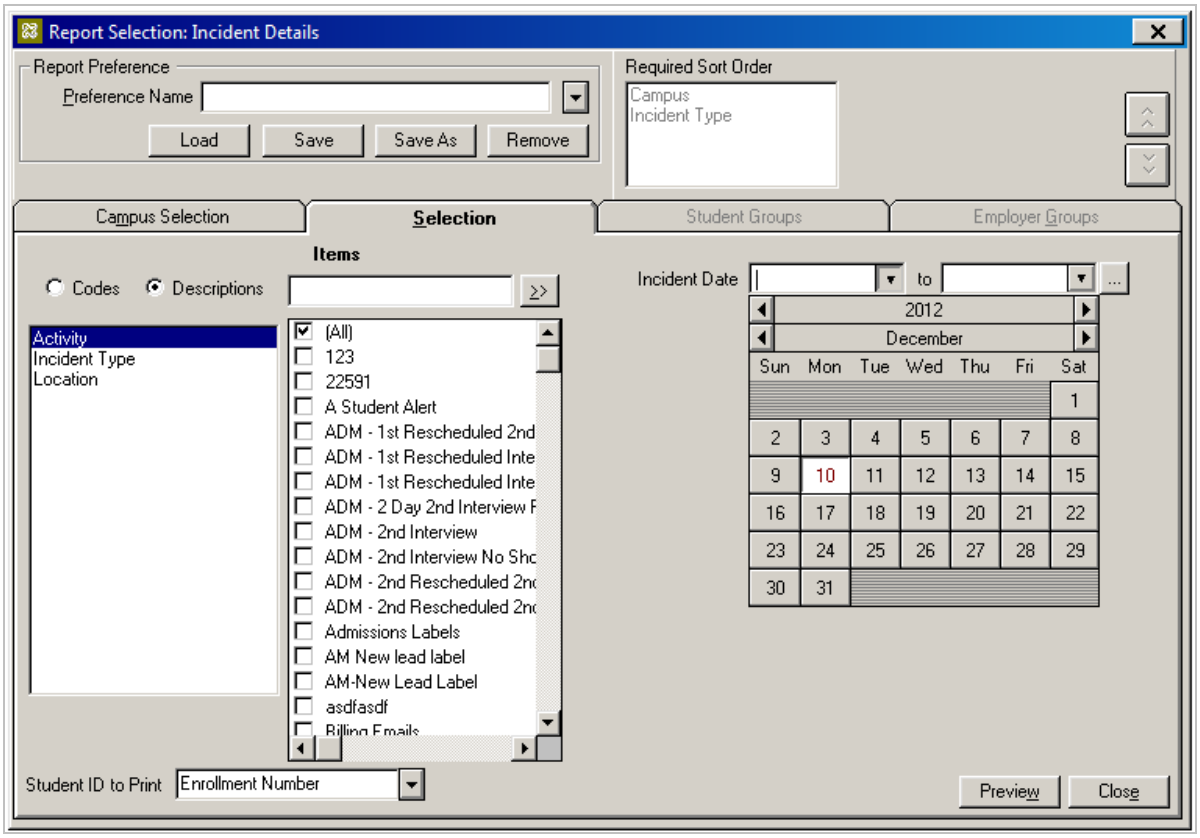
The Incident Details report records and summarizes incident information. The incidents are grouped by campus and incident type. Additionally, the report displays the following information:

- sub totals of all incidents reported for each location (On Campus, Non-Campus Property, Public Property);
- total number of incidents reported for each incident type at each location, and
- total number of incidents reported at each building or room for On Campus Incidents.

The report displays a count of one (1) for each incident reported, regardless of the number of students involved in the incident. Sub-reports display the incident details.

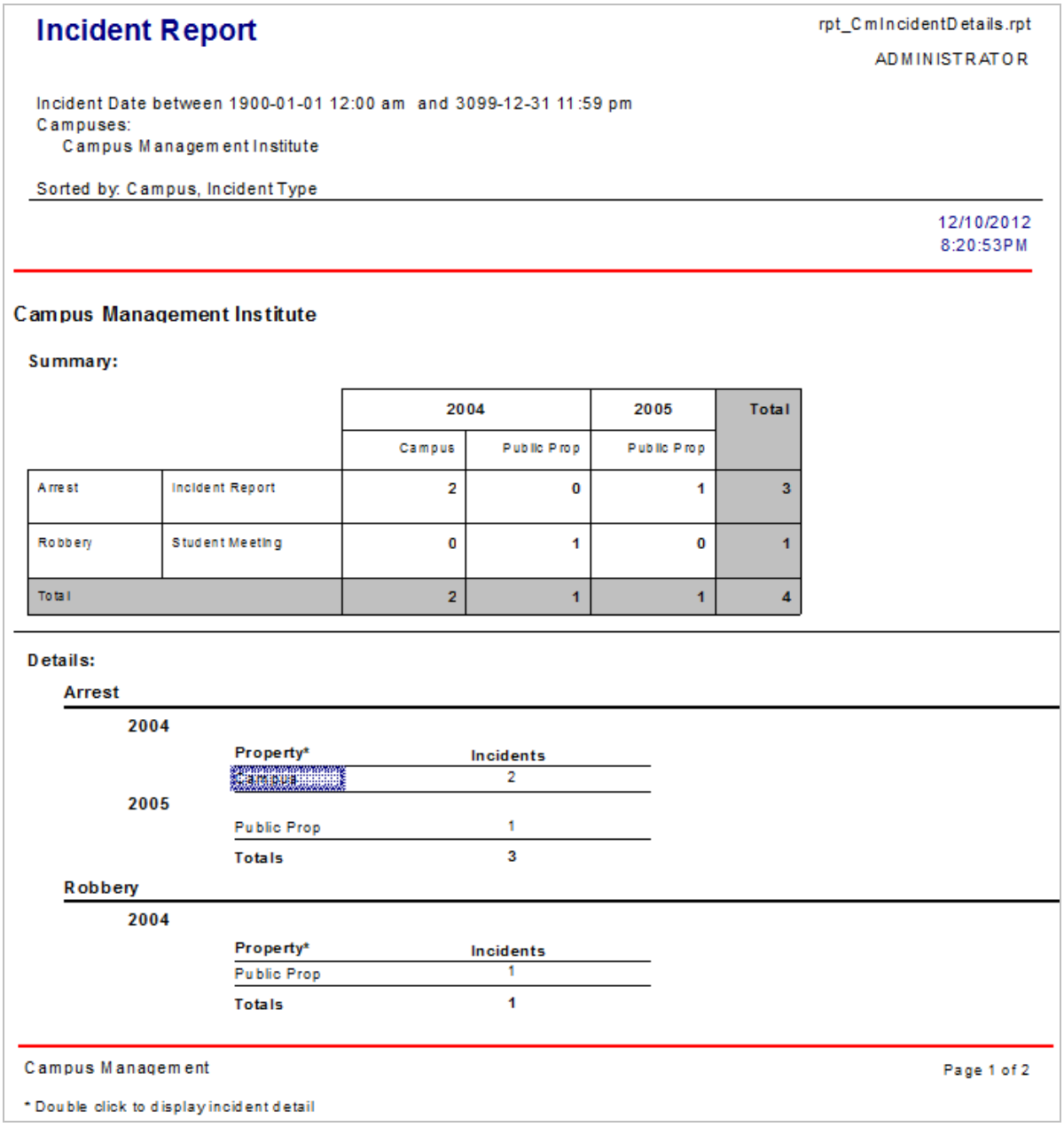
To run the report:

1. Navigate to **Reports > Contact Manager > Incident Details**. The Report Selection: Incident Details form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The following is an example of the report, followed by the associated details.



Incident Report

rpt_CmIncidentDetails.rpt

ADMINISTRATOR

Incident Date between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Campuses:
Campus Management Institute

Sorted by: Campus, Incident Type

12/10/2012
8:20:53PM

Campus Management Institute

Summary:

		2004		2005	Total
		Campus	Public Prop	Public Prop	
Arrest	Incident Report	2	0	1	3
Robbery	Student Meeting	0	1	0	1
Total		2	1	1	4

Details:

Arrest

2004

Property*	Incidents
Campus	2

2005

Public Prop	1
Totals	**3**

Robbery

2004

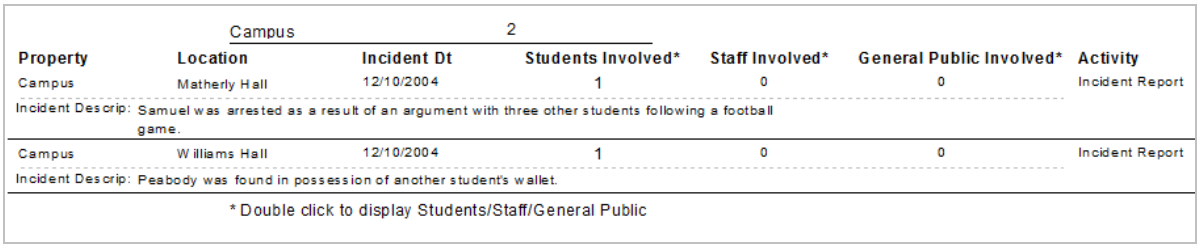
Property*	Incidents
Public Prop	1
Totals	**1**

Campus Management

Page 1 of 2

* Double click to display incident detail

To view details about each incident, click on the incident type within the report. A sub-report is displayed with summaries of each incident that was associated with that particular incident type.



Campus 2

Property	Location	Incident Dt	Students Involved*	Staff Involved*	General Public Involved*	Activity
Campus	Matherly Hall	12/10/2004	1	0	0	Incident Report
Incident Descrip:	Samuel was arrested as a result of an argument with three other students following a football game.					
Campus	Williams Hall	12/10/2004	1	0	0	Incident Report
Incident Descrip:	Peabody was found in possession of another student's wallet.					

* Double click to display Students/Staff/General Public

To view further details about specific incidents, click on the row of the report containing the date and incident for which more information is required. The report shows details about the requested incident including the names of all

students, staff members, or general public members who were involved. The location, description, and any additional information on the incident report are also listed.

Property	Location	Incident Dt	Students Involved*	Staff Involved*	General Public Involved*	Activity
Campus	Williams Hall	12/10/2004	1	0	0	Incident Report

Incident Descrip: Peabody was found in possession of another student's wallet.

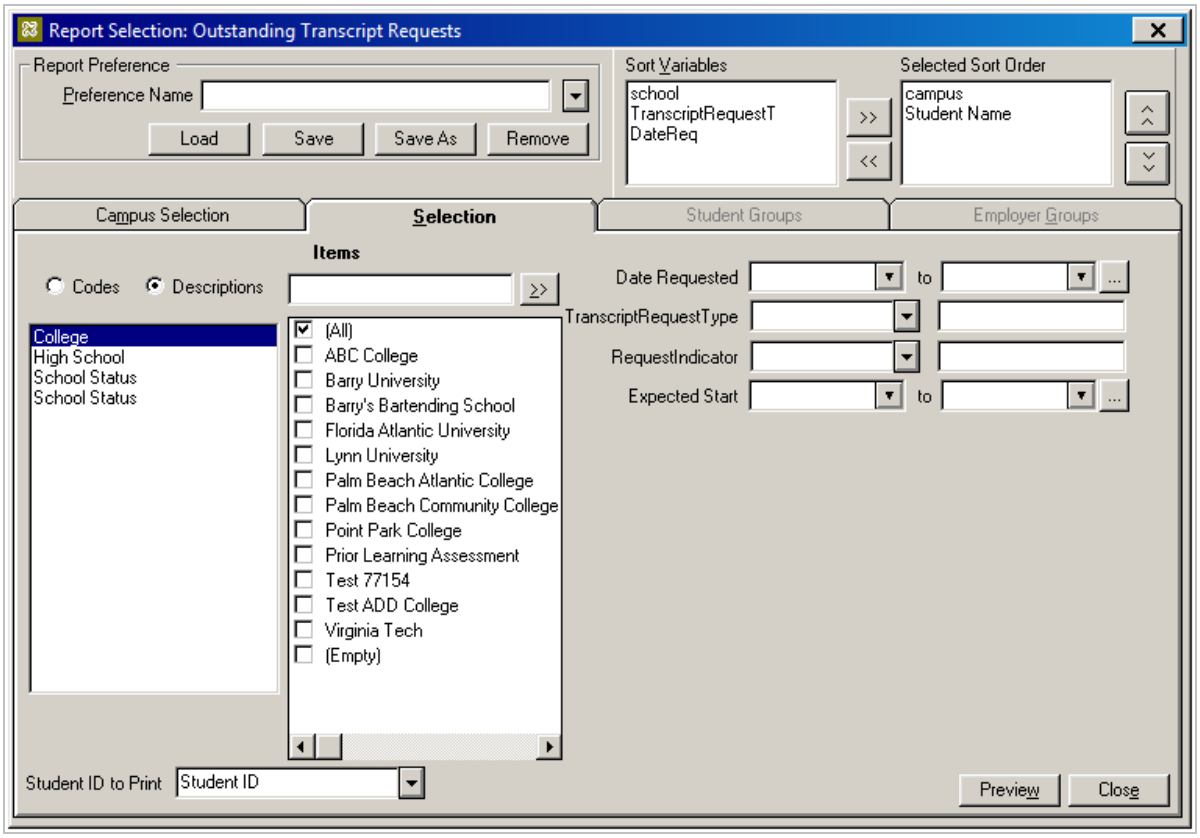
Student Name	SSN	School Status	LDA
Snacker, Peabody	264-56-8099	Attending	5/18/2001

Outstanding Transcript Requests

This report is used to process and track academic transcript requests that your institution has made to other institutions.

To run the report:

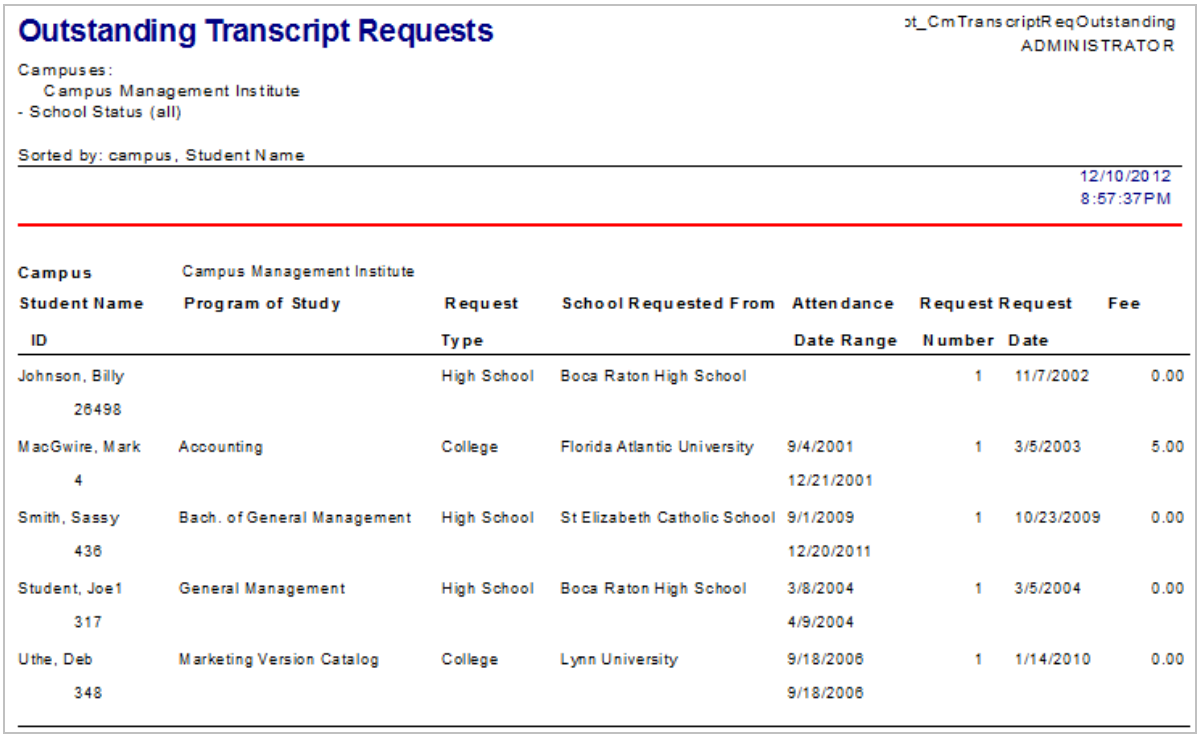
1. Navigate to **Reports > Contact Manager > Outstanding Transcript Requests**. The Report Selection: Outstanding Transcript Requests form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the campus, college/high school, request number, request date, expected start date, school

status, and status category.



Outstanding Transcript Requests

ot_CmTranscriptReqOutstanding
ADMINISTRATOR

Campuses:
Campus Management Institute
- School Status (all)

Sorted by: campus, Student Name

12/10/2012
8:57:37PM

Campus Campus Management Institute

Student Name / ID	Program of Study	Request Type	School Requested From	Attendance Date Range	Request Number	Request Date	Fee
Johnson, Billy 26498		High School	Boca Raton High School		1	11/7/2002	0.00
MacGwire, Mark 4	Accounting	College	Florida Atlantic University	9/4/2001 12/21/2001	1	3/5/2003	5.00
Smith, Sassy 436	Bach. of General Management	High School	St Elizabeth Catholic School	9/1/2009 12/20/2011	1	10/23/2009	0.00
Student, Joe1 317	General Management	High School	Boca Raton High School	3/8/2004 4/9/2004	1	3/5/2004	0.00
Uthe, Deb 348	Marketing Version Catalog	College	Lynn University	9/18/2006 9/18/2006	1	1/14/2010	0.00

Permit Document Tracking

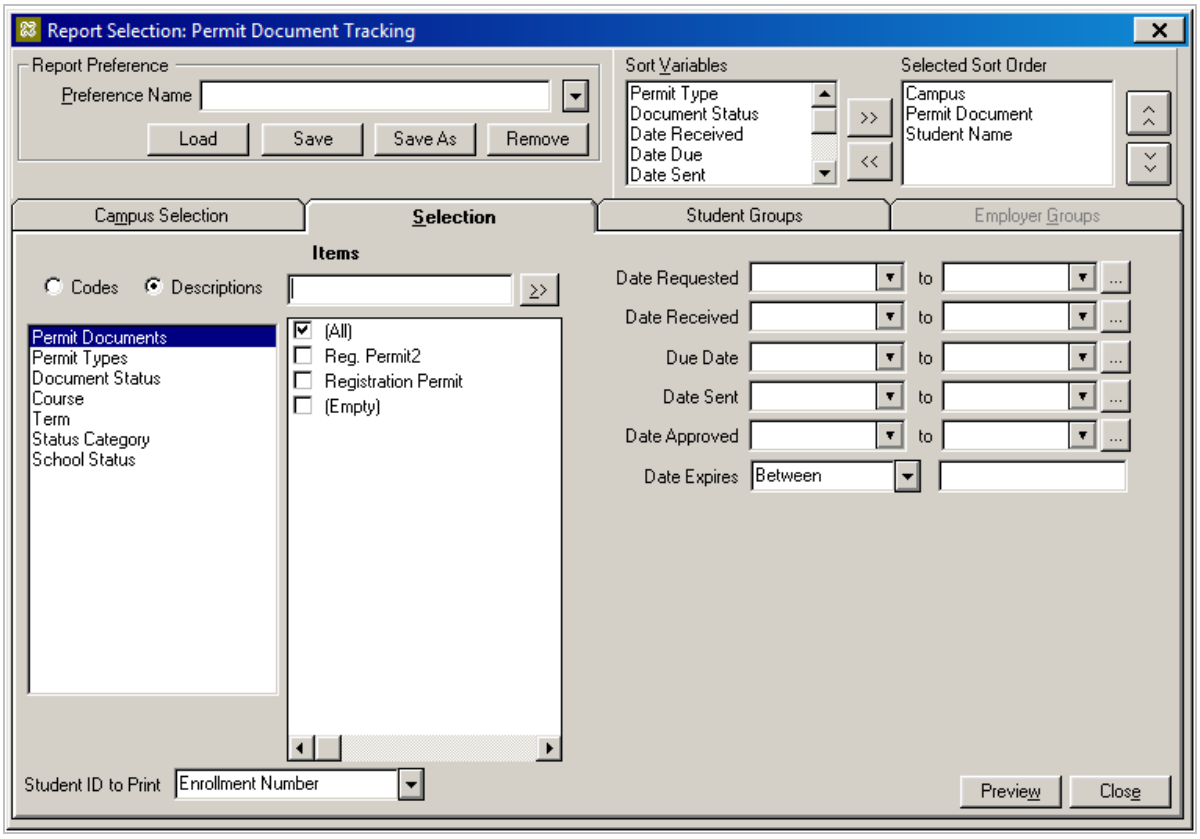
This report is based on the current Document Tracking Report.

The Section information (suppressed when no data) includes:

- Term
- Course
- Section
- Description
- Instructor

To run the report:

1. Navigate to **Reports > Contact Manager > Permit Document Tracking**. The Report Selection: Permit Document Tracking form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

- Student Name
- Student ID
- Campus
- Permit Document Description and Code
- Permit Types (one per line)
- Document Status
- Comments
- Date Requested
- Date Received
- Date Approved
- Date Expires
- Courses and Terms (list, one per line)

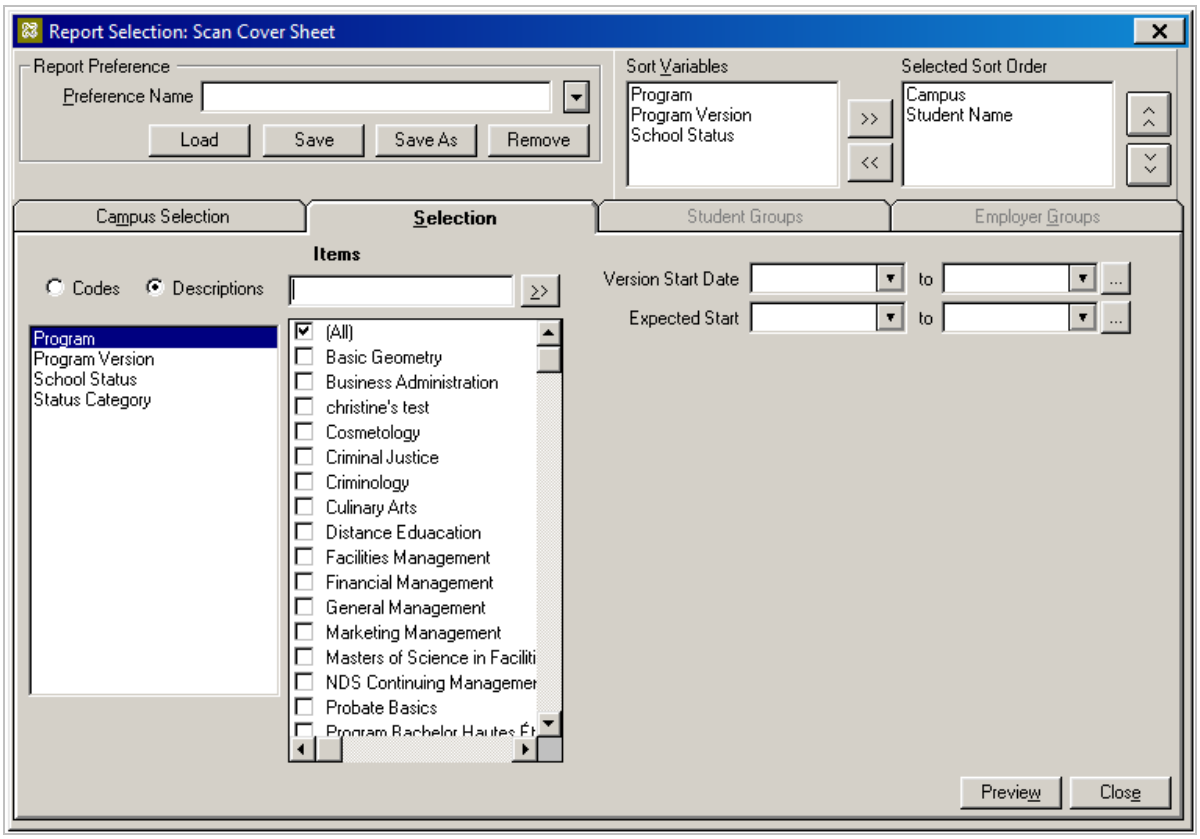
The report uses two groups which contain group (student) counts. The report totals students in the footer.

Scan Cover Sheet

The Scan Cover Sheet report is a valuable tool for any ImageNow campus because the cover sheets can be printed all at once. If more than one school status is selected for the report, a scan cover sheet is printed for each school status selected.

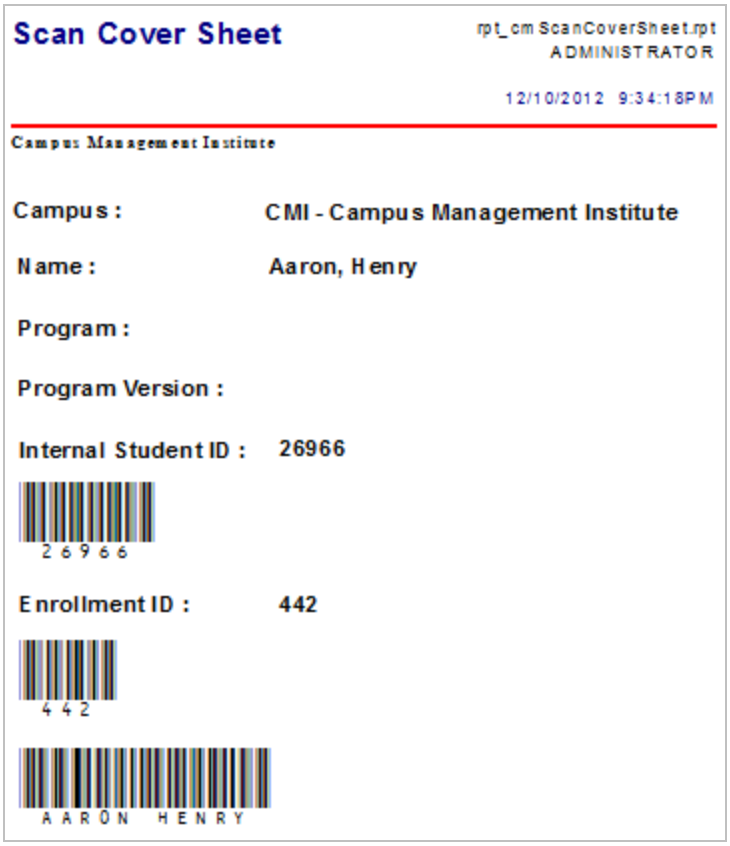
To run the report:

1. Navigate to **Reports > Contact Manager > Scan Cover Sheet**. The Report Selection: Scan Cover Sheet form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



Note: The Student Groups tab is disabled to prevent unwanted Scan Cover Sheets to be printed for students with multiple enrollments such as Cancelled or Dropped if run by student group. This could lead to confusion and/or documents being attached to the wrong enrollment.

4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

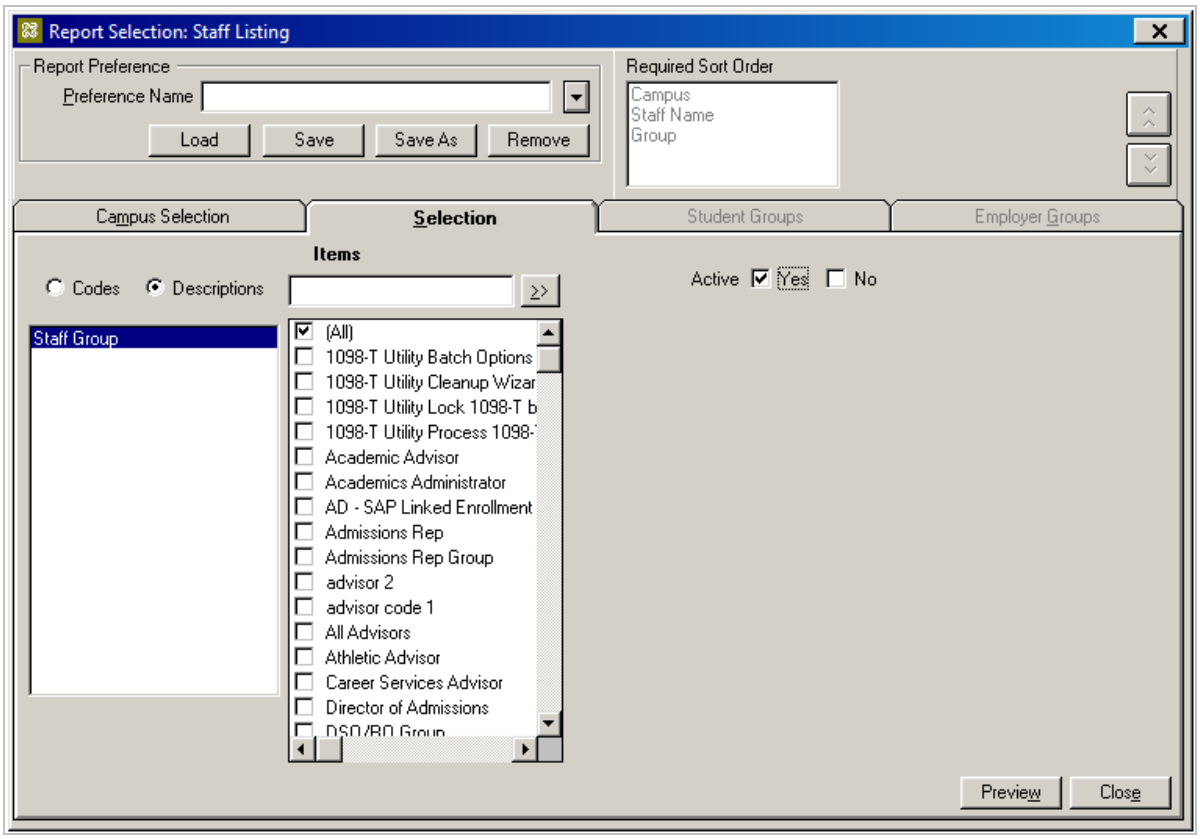


Staff Listing

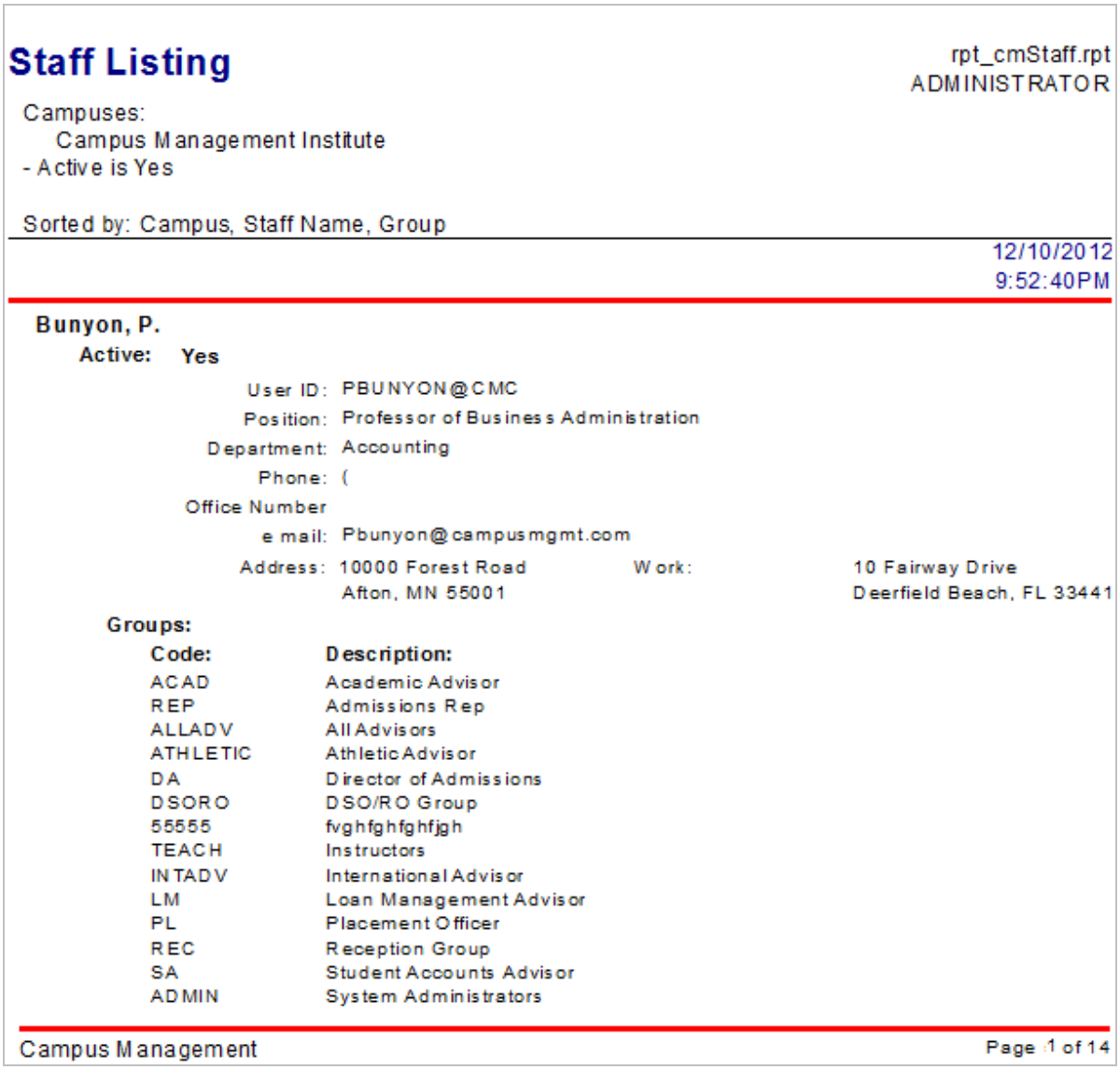
This report lists staff members for a selected campus or all campuses. For each staff member listed, demographic data from the Staff Member Setup form is displayed. Staff groups to which each staff member belongs are also listed.

To run the report:

1. Navigate to **Reports > Contact Manager > Staff Listing**. The Report Selection: Staff Listing form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. Click **Preview**. The report is assembled and displayed in the Report Viewer.



Staff Listing

rpt_cmStaff.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- Active is Yes

Sorted by: Campus, Staff Name, Group

12/10/2012
9:52:40PM

Bunyon, P.

Active: **Yes**

User ID: PBUNYON@CMC
Position: Professor of Business Administration
Department: Accounting
Phone: (
Office Number
e mail: Pbunyon@campusmgmt.com
Address: 10000 Forest Road
Afton, MN 55001
Work: 10 Fairway Drive
Deerfield Beach, FL 33441

Groups:

Code:	Description:
ACAD	Academic Advisor
REP	Admissions Rep
ALLADV	All Advisors
ATHLETIC	Athletic Advisor
DA	Director of Admissions
DSORO	DSO/RO Group
55555	fvghfghfghfjgh
TEACH	Instructors
INTADV	International Advisor
LM	Loan Management Advisor
PL	Placement Officer
REC	Reception Group
SA	Student Accounts Advisor
ADMIN	System Administrators

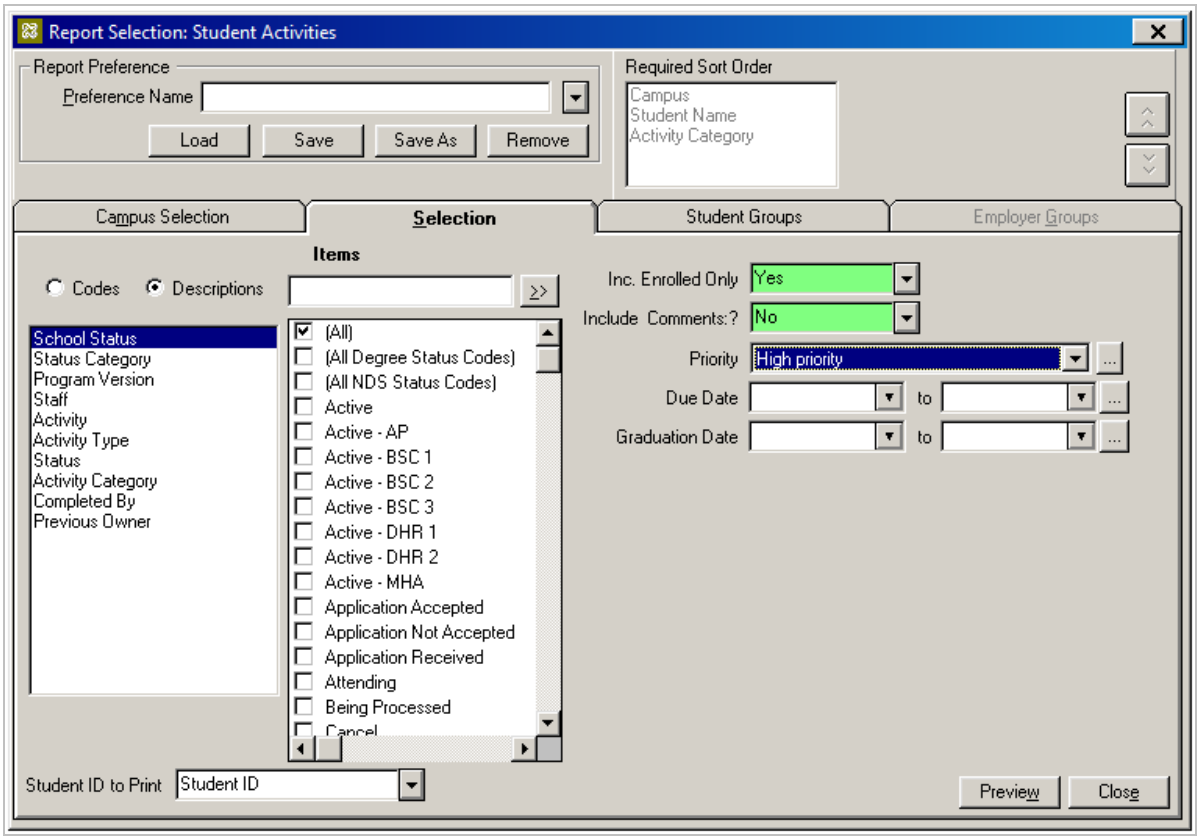
Campus Management
Page 1 of 14

Student Activities

The Student Activities report lists activities by students based on your selection criteria. The report may also display associations between activities and activity categories. For additional information on setting up associations between activities and their categories, see Activity Categories.

To run the report:

1. Navigate to **Reports > Contact Manager > Student Activities**. The Report Selection: Student Activities form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

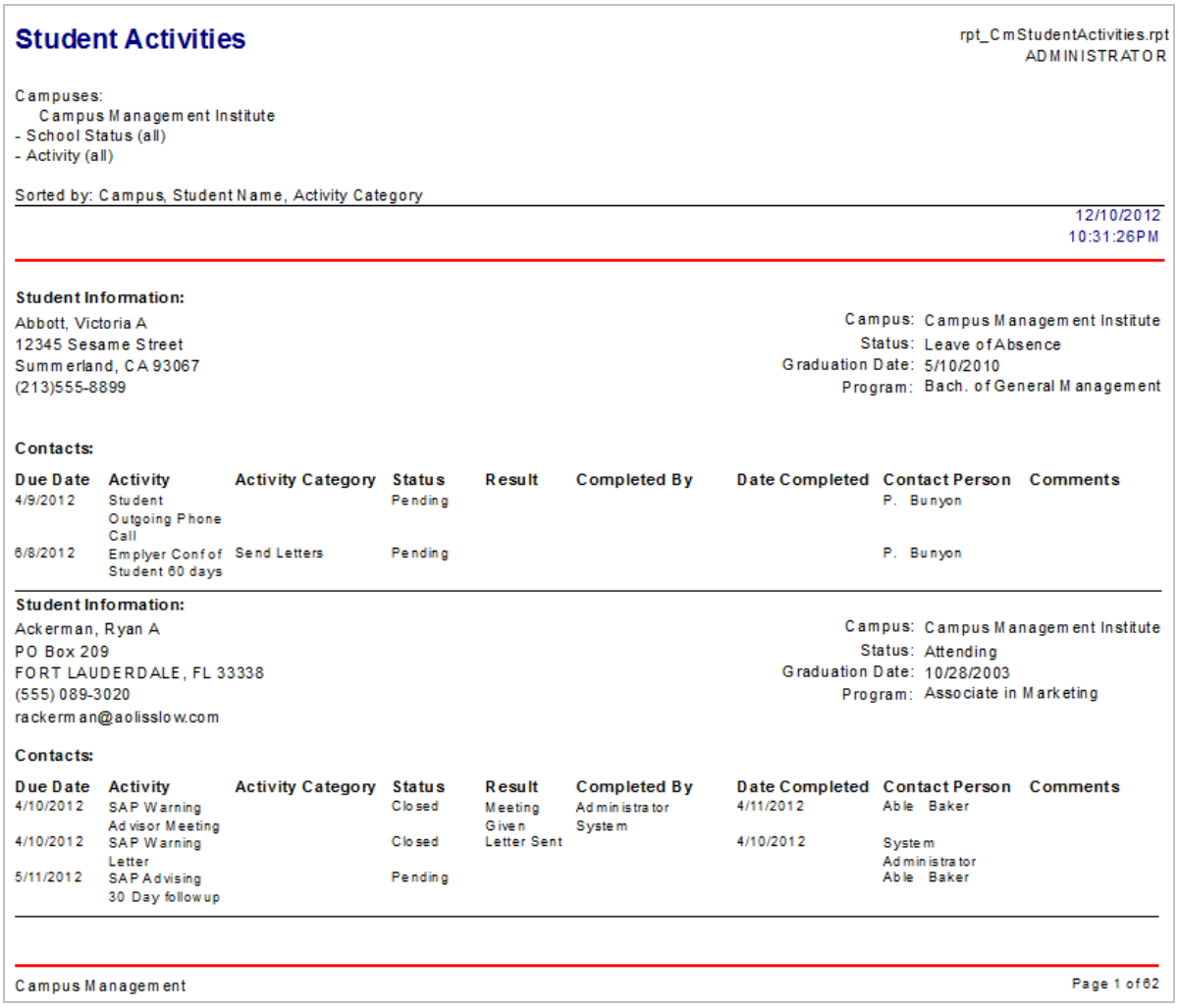
   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report header lists the student name and address, campus, degree, status in school, and graduation date.

   For each activity, the body of the report shows the due date, activity description, activity category, status, result,

completed by, date completed, contact person (staff member assigned), and comments.



Student Activities

rpt_CmStudentActivities.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- School Status (all)
- Activity (all)

Sorted by: Campus, Student Name, Activity Category

12/10/2012
10:31:26PM

Student Information:

Abbott, Victoria A
12345 Sesame Street
Summerland, CA 93067
(213)555-8899

Campus: Campus Management Institute
Status: Leave of Absence
Graduation Date: 5/10/2010
Program: Bach. of General Management

Contacts:

Due Date	Activity	Activity Category	Status	Result	Completed By	Date Completed	Contact Person	Comments
4/9/2012	Student Outgoing Phone Call		Pending				P. Bunyon	
6/8/2012	Emplyer Conf of Student 60 days	Send Letters	Pending				P. Bunyon	

Student Information:

Ackerman, Ryan A
PO Box 209
FORT LAUDERDALE, FL 33338
(555) 089-3020
rackerman@aolisslow.com

Campus: Campus Management Institute
Status: Attending
Graduation Date: 10/28/2003
Program: Associate in Marketing

Contacts:

Due Date	Activity	Activity Category	Status	Result	Completed By	Date Completed	Contact Person	Comments
4/10/2012	SAP Warning Advisor Meeting		Closed	Meeting Given	Administrator System	4/11/2012	Able Baker	
4/10/2012	SAP Warning Letter		Closed	Letter Sent		4/10/2012	System Administrator	
5/11/2012	SAP Advising 30 Day followup		Pending				Able Baker	

Campus Management

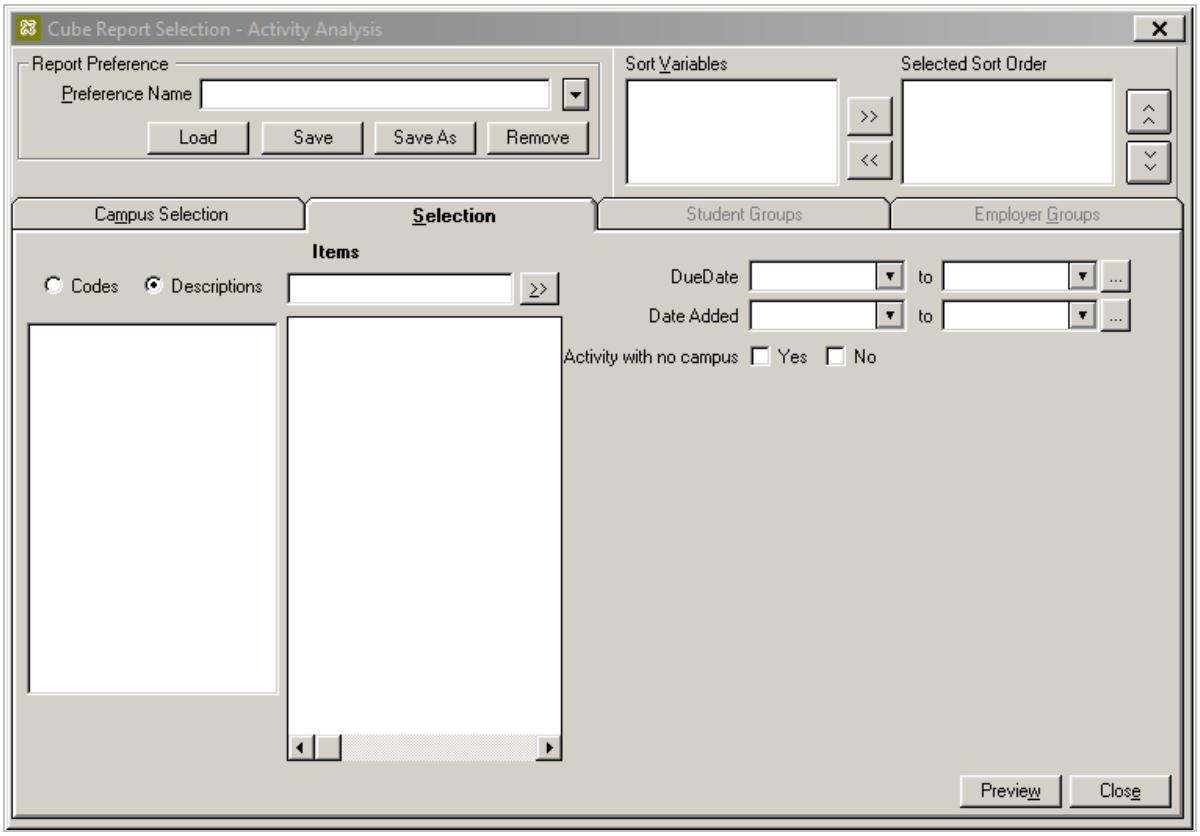
Page 1 of 62

Activity Analysis

This cube report is a tool for the analysis of Contact Manager activities. Associations between activities and activity categories may also appear on this report. For additional information on setting up associations between activities and their categories see Activity Categories.

To run the report:

1. Navigate to **Reports > Contact Manager > Activity Analysis**. The Cube Report Selection: Activity Analysis form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



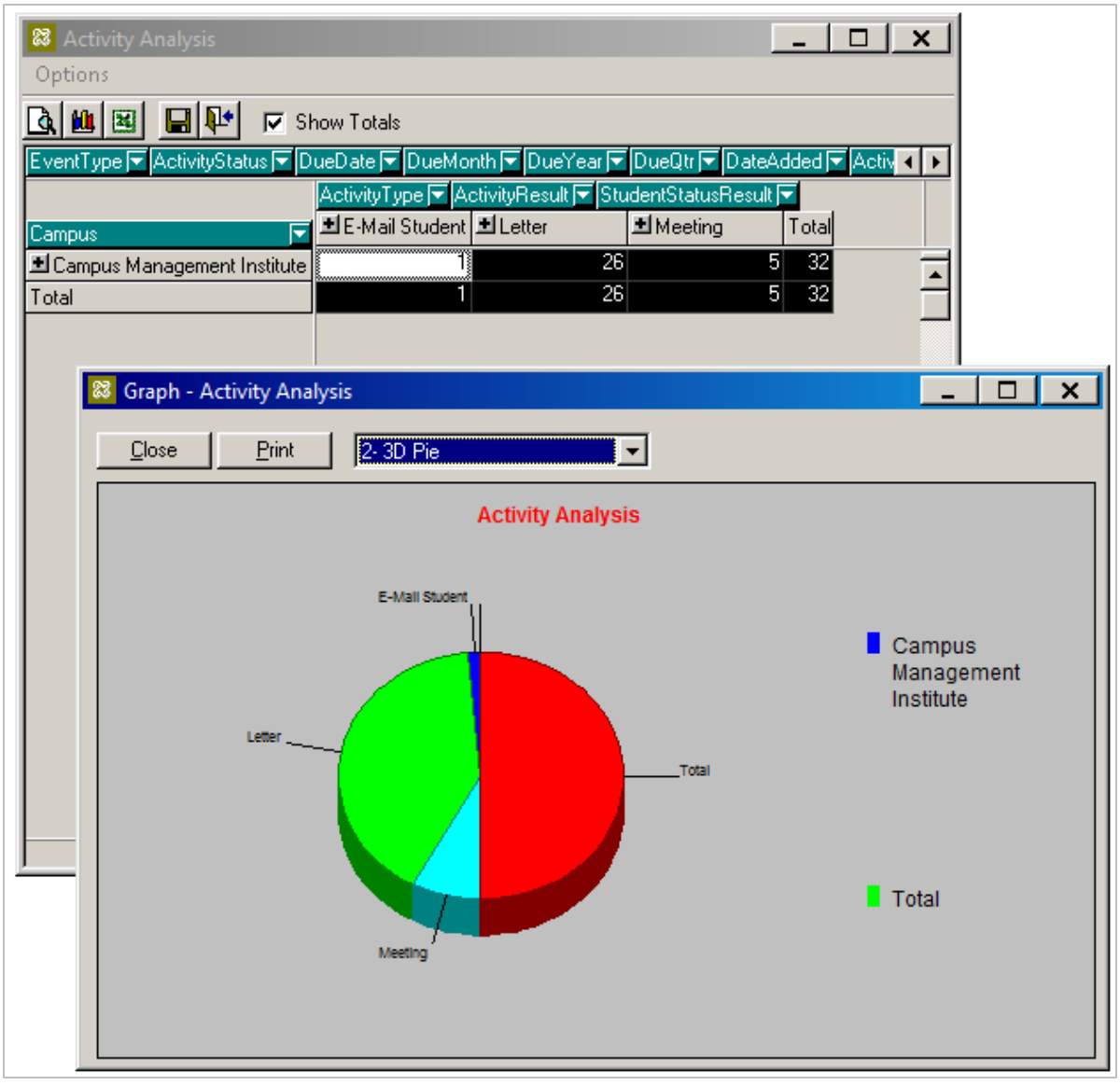
4. Click **Preview**. The cube report is assembled and displayed.

   The following variables are available for use in this cube report:

   - Event Type
   - Activity Status
   - Due Date
   - Due Month
   - Due Year
   - Due Quarter
   - Date Added
   - Activity Status Date

- Activity Category
- Completed By
- Previous Owner
- Activity Type
- Activity Result
- Student Status Result
- Campus

Drag the variables to the vertical or horizontal axes as needed to get the cross-tabulated spreads. The cube is initialized with Campus as the Y axis (rows) and Activity Type, Activity Result, and Student Status result as the X axis (columns).



Contact Manager Reports

Navigate to **Reports > Contact Manager** to access the following Contact Manager reports:

- Activity Detail
- Do Not Call List
- Do Not Call List (No Phone Number)
- Document Tracking Report
- FERPA Opt-Out Listing
- Incident Details
- Outstanding Transcript Requests
- Permit Document Tracking
- Scan Cover Sheet
- Staff Listing
- Student Activities
- Activity Analysis (cube report)

Navigate to **Reports > Contact Manager > International** to access the following reports for international students:

- Document Tracking
- Enrollment Status Comparison
- Master Student Listing Detail
- Master Student Listing Summary
- SEVIS Export Report
- SEVIS Import Report
- Student Report
- Students with Dependents
- Demographics (cube report)

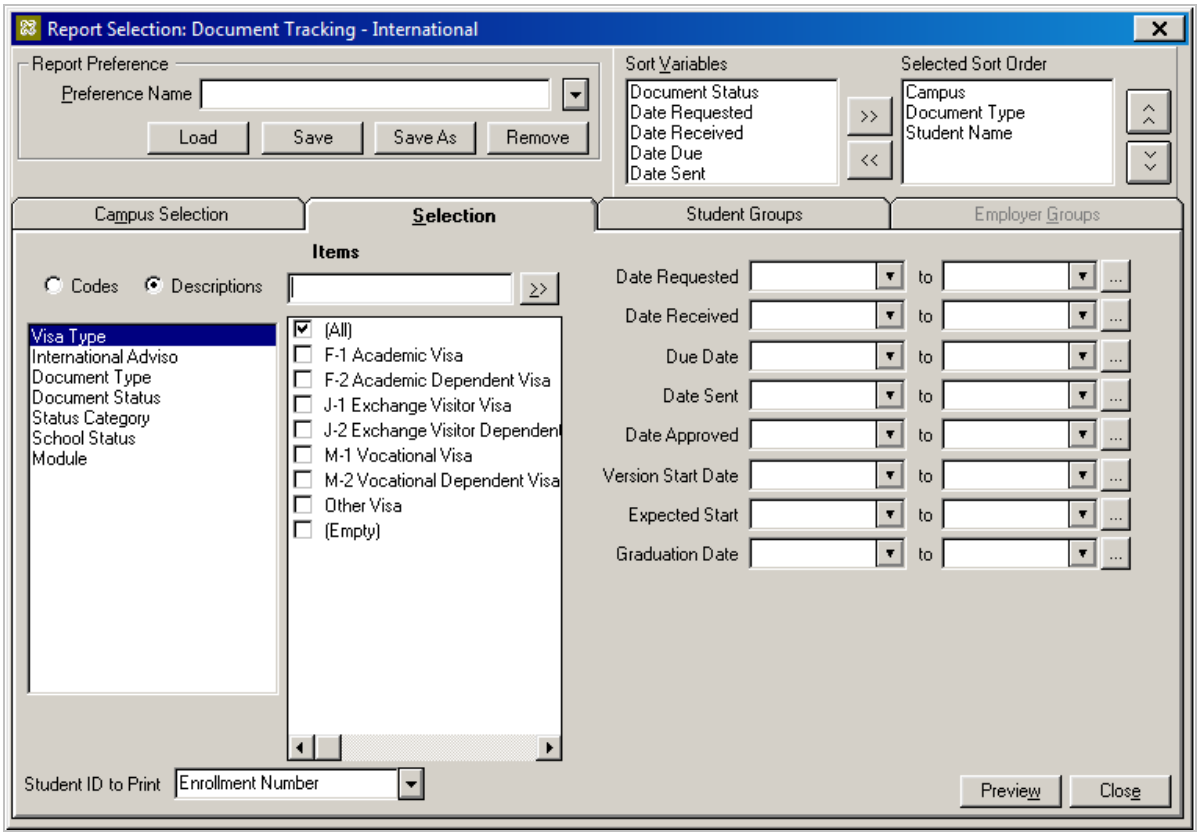
Note: The System Administrator must set up security rights to view, print, or export reports. Staff members and staff groups must be given security rights to view, print, and/or export reports. This does not apply to custom reports.

Document Tracking

The Document Tracking - International report is different from other document tracking reports in that it focuses on the special requirements for monitoring international students.

To run the report:

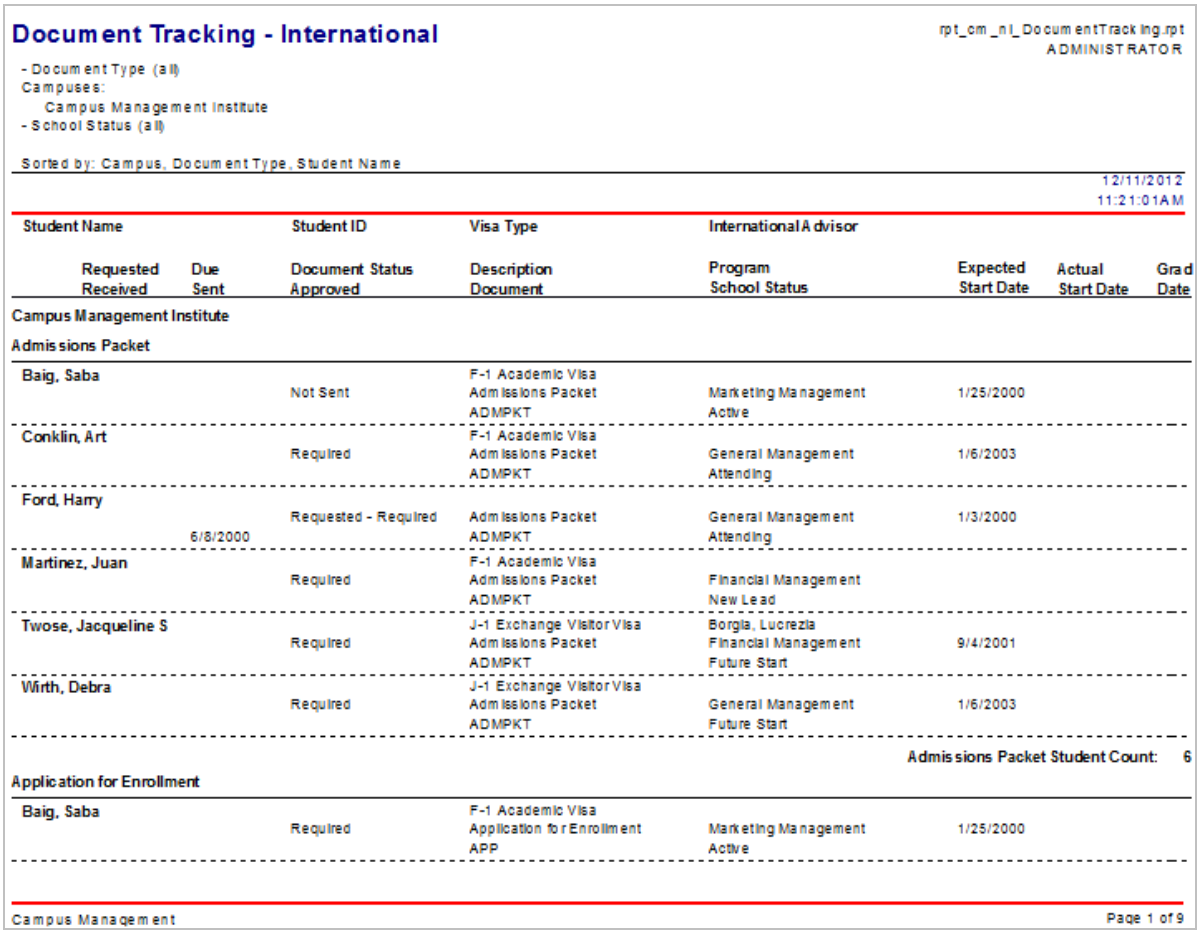
1. Navigate to **Reports > Contact Manager > International Reports > Document Tracking**. The Report Selection: Document Tracking - International form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.



Document Tracking - International

rpt_cm_nl_DocumentTracking.rpt
ADMINISTRATOR

- Document Type (all)
Campuses:
Campus Management Institute
- School Status (all)

Sorted by: Campus, Document Type, Student Name

12/11/2012
11:21:01AM

Student Name	Student ID	Visa Type	International Advisor			
Requested / Received — Due / Sent	Document Status / Approved	Description / Document	Program / School Status	Expected Start Date	Actual Start Date	Grad Date
Campus Management Institute						
Admissions Packet						
Baig, Saba	Not Sent	F-1 Academic Visa Admissions Packet ADMPKT	Marketing Management Active	1/25/2000		
Conklin, Art	Required	F-1 Academic Visa Admissions Packet ADMPKT	General Management Attending	1/6/2003		
Ford, Harry 6/8/2000	Requested - Required	Admissions Packet ADMPKT	General Management Attending	1/3/2000		
Martinez, Juan	Required	F-1 Academic Visa Admissions Packet ADMPKT	Financial Management New Lead			
Twose, Jacqueline S	Required	J-1 Exchange Visitor Visa Admissions Packet ADMPKT	Borgia, Lucrezia Financial Management Future Start	9/4/2001		
Wirth, Debra	Required	J-1 Exchange Visitor Visa Admissions Packet ADMPKT	General Management Future Start	1/6/2003		
				Admissions Packet Student Count:		6
Application for Enrollment						
Baig, Saba	Required	F-1 Academic Visa Application for Enrollment APP	Marketing Management Active	1/25/2000		

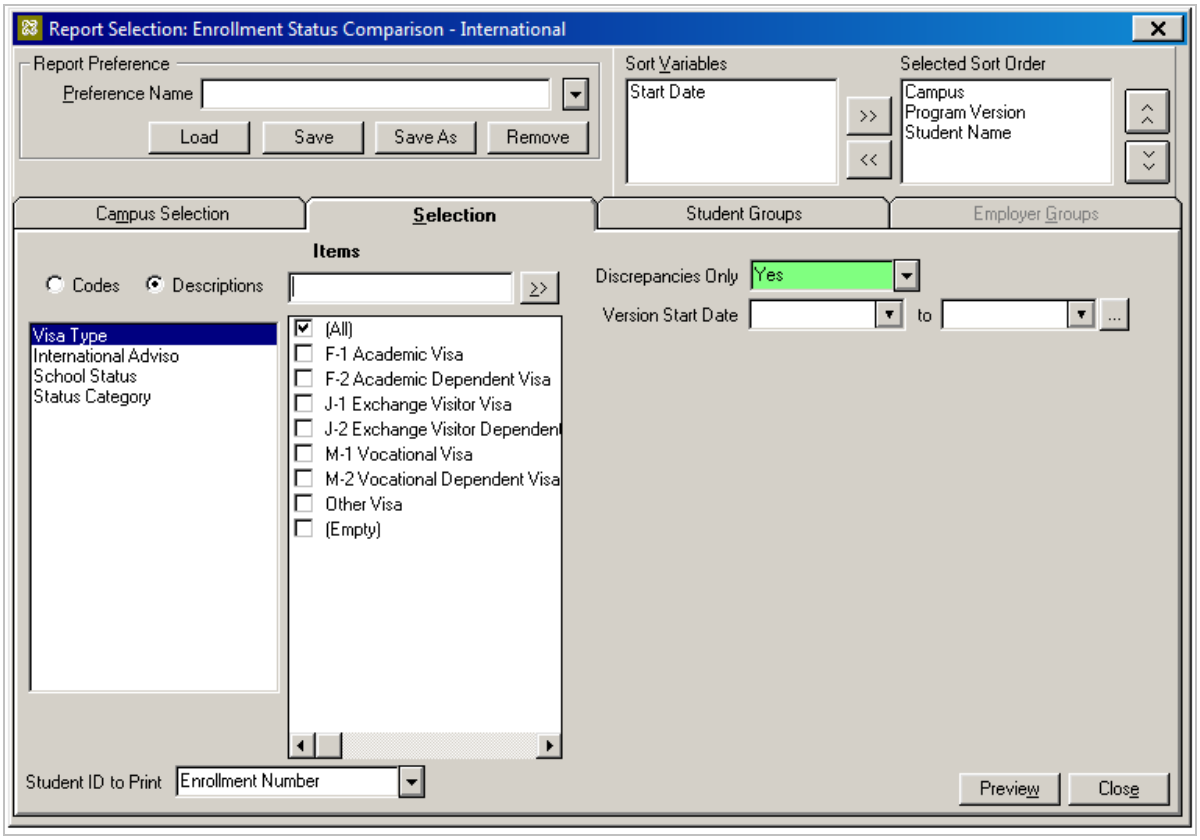
Campus Management — Page 1 of 9

Enrollment Status Comparison

This report can be used to compare the students' enrollment statuses in their program versions to the enrollment statuses recorded in the Student and Exchange Visitor Information System (SEVIS).

To run the report:

1. Navigate to **Reports > Contact Manager > International Reports > Enrollment Status Comparison**. The Report Selection: Enrollment Status Comparison - International form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

Enrollment Status Comparison - International

rpt_cm_nl_EnrollmentStatus.rpt
ADMINISTRATOR

- Printing Discrepancies Only
Campuses:
Campus Management Institute
- School Status (all)

Sorted by: Campus, Program Version, Student Name

12/11/2012
11:25:18AM

Student Name / Visa Type / Student ID	Program Version / Student Status / International Advisor	Start Date / Expected Graduation Date / SEVIS Transmission Status	Enrollment Status: Academic Records		SEVIS	
Campus Management Institute						
Associate in Financial Management						
Twose, Jacqueline Su J-1 Exchange Visitor Visa 0108TW0393	Associate in Financial Manageme Future Start Borgia, Lucrezia	5/1/2006 10/30/2002	L	Less Than Half Time	F	Full-Time
				Associate in Financial Management		**Count: 1**
Bach. of General Management						
Conklin, Art F-1 Academic Visa 0302CO0428	Bach. of General Management Attending	 8/31/2005 S	L	Less Than Half Time	None	
Ford, Harry 0003FO0272	Bach. of General Management Attending	9/4/2000 12/12/2003	L	Less Than Half Time	None	
Wirth, Debra J-1 Exchange Visitor Visa 0302WI0427	Bach. of General Management Future Start	 8/31/2005 S	L	Less Than Half Time	F	Full-Time
				Bach. of General Management		**Count: 3**
Credit Associate in Marketing Management						
Baig, Saba F-1 Academic Visa 0001BA0239	Credit Associate in Marketing Ma Cancel	1/3/2001 6/30/2004	F	Full Time	None	
				Credit Associate in Marketing Management		**Count: 1**
				Campus Management Institute		**Count: 5**

5 record(s) selected

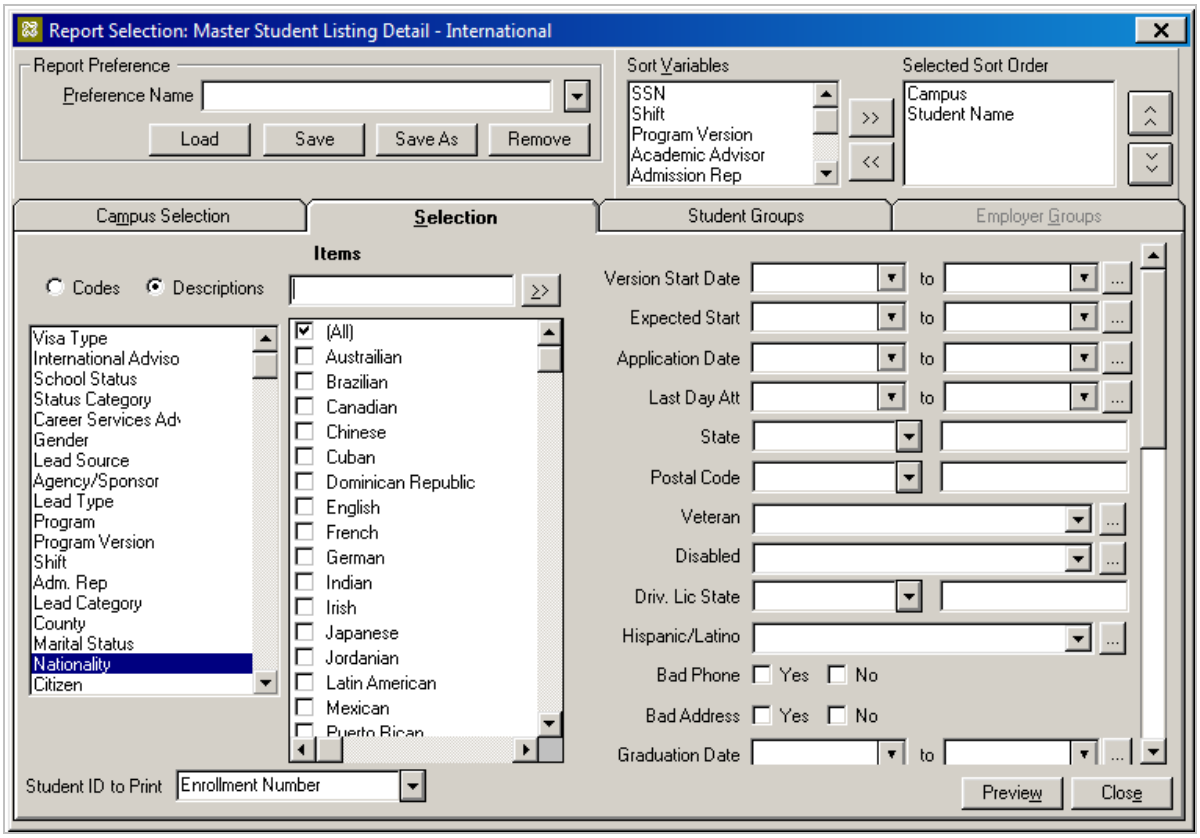
Campus Management — Page 1 of 1

Master Student Listing Detail

This report provides a detail listing of the international student at your institution. The report is a variation of the similar report on the Academic Records Report menu.

To run the report:

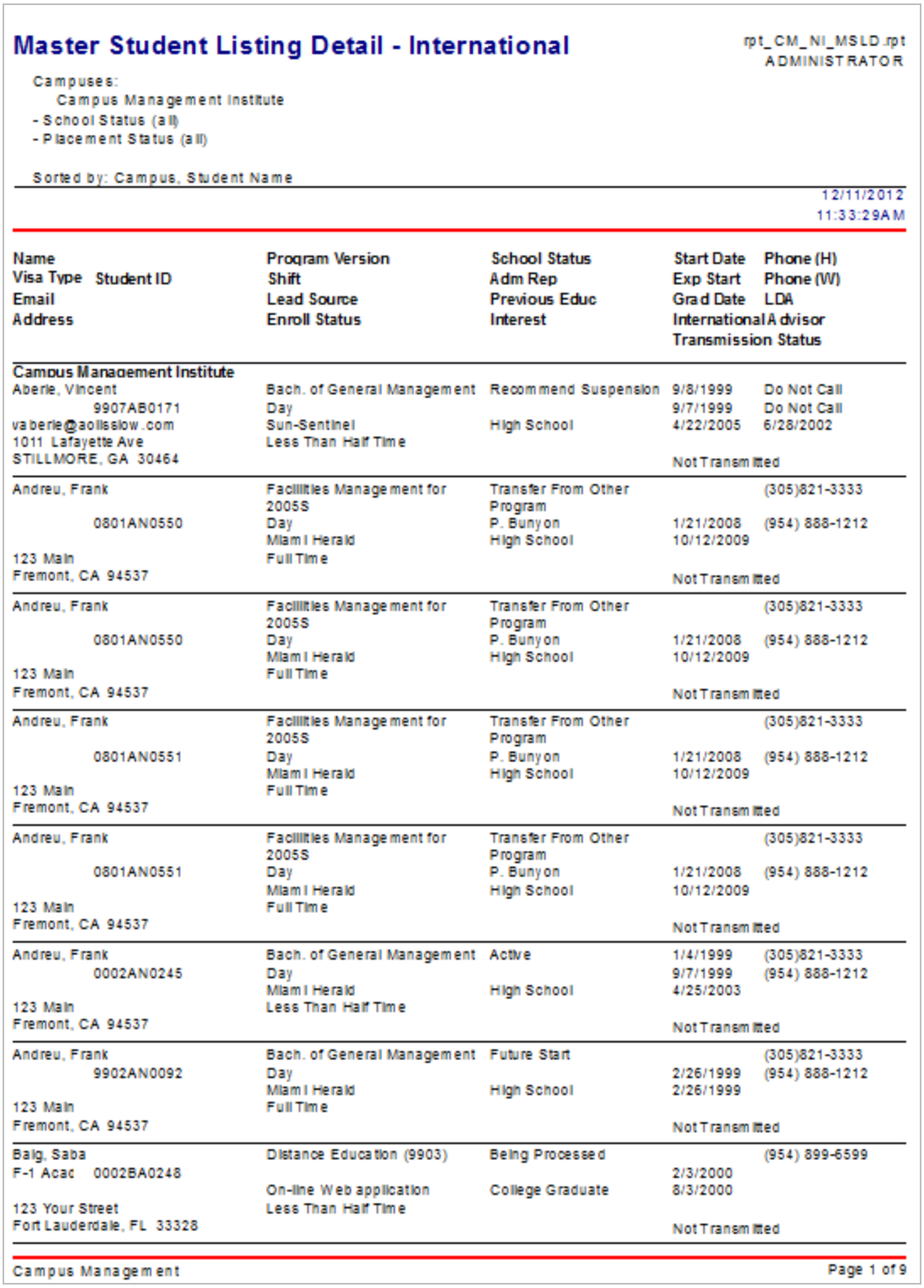
1. Navigate to **Reports > Contact Manager > International Reports > Master Student Listing Detail**. The Report Selection: Master Student Listing Detail - International form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.



Master Student Listing Detail - International

rpt_CM_NI_MSLD.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- School Status (all)
- Placement Status (all)

Sorted by: Campus, Student Name

12/11/2012
11:33:29AM

Name / Visa Type / Student ID / Email / Address	Program Version / Shift / Lead Source / Enroll Status	School Status / Adm Rep / Previous Educ / Interest	Start Date / Exp Start / Grad Date / International Advisor / Transmission Status	Phone (H) / Phone (W) / LDA
Campus Management Institute				
Aberle, Vincent 9907AB0171 vaberle@aolisslow.com 1011 Lafayette Ave STILLMORE, GA 30464	Bach. of General Management Day Sun-Sentinel Less Than Half Time	Recommend Suspension High School	9/8/1999 9/7/1999 4/22/2005 Not Transmitted	Do Not Call Do Not Call 6/28/2002
Andreu, Frank 0801AN0550 123 Main Fremont, CA 94537	Facilities Management for 2005S Day Miami Herald Full Time	Transfer From Other Program P. Bunyon High School	1/21/2008 10/12/2009 Not Transmitted	(305)821-3333 (954) 888-1212
Andreu, Frank 0801AN0550 123 Main Fremont, CA 94537	Facilities Management for 2005S Day Miami Herald Full Time	Transfer From Other Program P. Bunyon High School	1/21/2008 10/12/2009 Not Transmitted	(305)821-3333 (954) 888-1212
Andreu, Frank 0801AN0551 123 Main Fremont, CA 94537	Facilities Management for 2005S Day Miami Herald Full Time	Transfer From Other Program P. Bunyon High School	1/21/2008 10/12/2009 Not Transmitted	(305)821-3333 (954) 888-1212
Andreu, Frank 0801AN0551 123 Main Fremont, CA 94537	Facilities Management for 2005S Day Miami Herald Full Time	Transfer From Other Program P. Bunyon High School	1/21/2008 10/12/2009 Not Transmitted	(305)821-3333 (954) 888-1212
Andreu, Frank 0002AN0245 123 Main Fremont, CA 94537	Bach. of General Management Day Miami Herald Less Than Half Time	Active High School	1/4/1999 9/7/1999 4/25/2003 Not Transmitted	(305)821-3333 (954) 888-1212
Andreu, Frank 9902AN0092 123 Main Fremont, CA 94537	Bach. of General Management Day Miami Herald Full Time	Future Start High School	2/26/1999 2/26/1999 Not Transmitted	(305)821-3333 (954) 888-1212
Baig, Saba F-1 Acad 0002BA0248 123 Your Street Fort Lauderdale, FL 33328	Distance Education (9903) On-line Web application Less Than Half Time	Being Processed College Graduate	2/3/2000 8/3/2000 Not Transmitted	(954) 899-6599

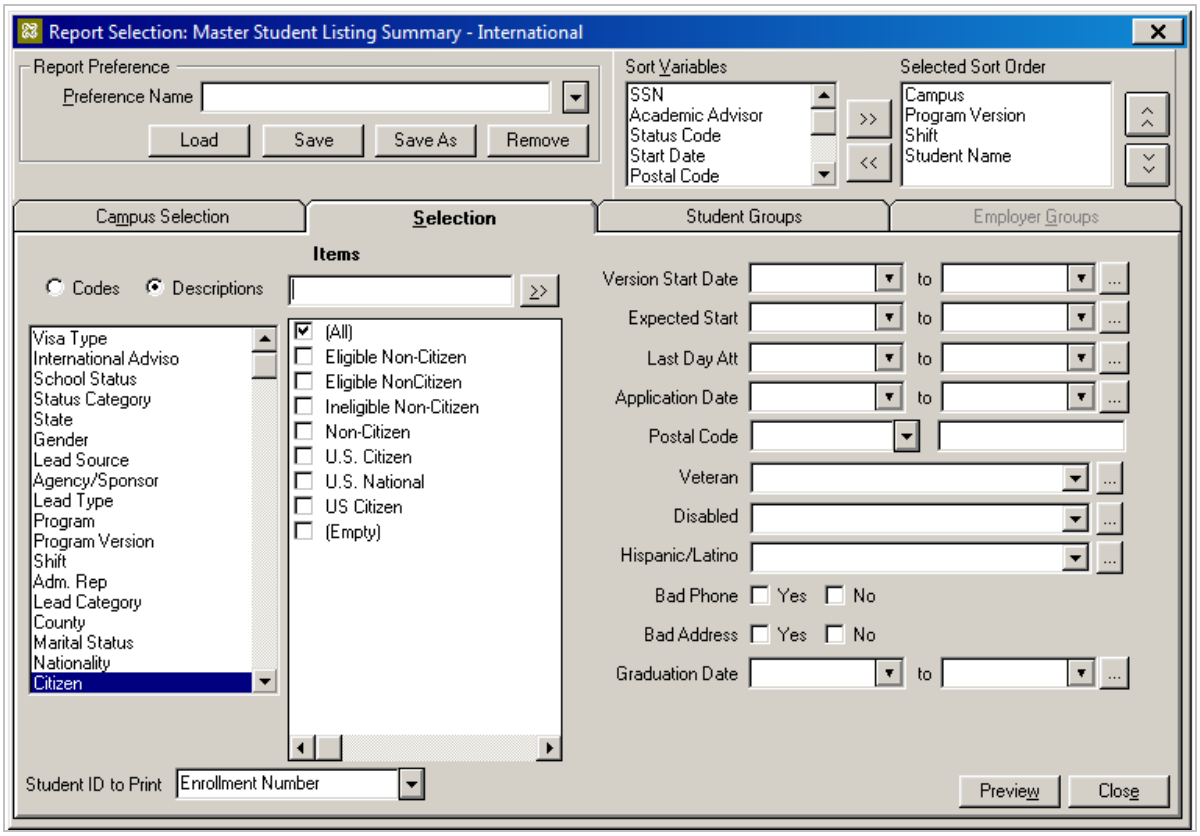
Campus Management — Page 1 of 9

Master Student Listing Summary

This report provides a summary listing of the international students at your institution. The report is a variation of a similar report on the Academic Records Report menu.

To run the report:

1. Navigate to **Reports > Contact Manager > International Reports > Master Student Listing Summary**. The Report Selection: Master Student Listing Summary - International form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

Master Student Listing Summary - International

rpt_CM_NI_MSLS.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- School Status (all)
- Placement Status (all)

Sorted by: Campus, Program Version, Shift, Student Name

12/11/2012
11:37:56AM

Name	Visa Type	Student ID	Email	Program Version	Enroll Status/ School Status	Version Start Date	Original Start Date	Exp Start Date	LDA	Phone (H)	
Campus Management Institute											
A Version											
Day											
Sanguinetti, Stanley		9907AL0174		A Version	L / Being Processed		9/4/2000	9/7/1999		(954)581-2359	
										Day	**1**
										A Version	**1**
AA S in Facilities Management											
Day											
Uthe, Deb		0811UT0561	deb@aol.com	AAS in Facilities	F / Being Processed		6/6/2005	1/7/2008		(913) 441-6782	
										Day	**1**
										AA S in Facilities Management	**1**
Associate in Financial Management											
Day											
Dazzling, Color O		0006DA0285	cod@cmi.edu	Associate in Financial	L / Transfer To Other Program	9/4/2000	9/4/2000	5/8/2000	6/11/2001	(561)555-3333	
Dazzling, Color O		0006DA0285	cod@cmi.edu	Associate in Financial	L / Transfer To Other Program	9/4/2000	9/4/2000	5/8/2000	6/11/2001	(561)555-3333	
Smith, John A		0312VO0443	jergensonvondugenhelmer@worldslongestemailaddress.	Associate in Financial	F / Being Processed		5/3/1999	9/5/2006		(954) 555-3456	
Smith, John A		0312VO0443	jergensonvondugenhelmer@worldslongestemailaddress.	Associate in Financial	F / Being Processed		5/3/1999	9/5/2006		(954) 555-3456	
Smith, John A		0312VO0443	jergensonvondugenhelmer@worldslongestemailaddress.	Associate in Financial	F / Being Processed		5/3/1999	9/5/2006		(954) 555-3456	
Student, Viv		0604ST0500	jclement@@campusmgmt.com	Associate in Financial	F / Future Start		1/3/2005	5/8/2000		(223) 555-4618	
Student, Viv		0604ST0500	jclement@@campusmgmt.com	Associate in Financial	F / Future Start		1/3/2005	5/8/2000		(223) 555-4618	
Student, Viv		0604ST0500	jclement@@campusmgmt.com	Associate in Financial	F / Future Start		1/3/2005	5/8/2000		(223) 555-4618	
Twose, Jacqueline S	J-1 Exch	0108TW0393	jtwose@hotmail.com	Associate in Financial	L / Future Start	5/1/2006	5/1/2006	1/6/2003		(561)555-1947	
Twose, Jacqueline S	J-1 Exch	0108TW0393	jtwose@hotmail.com	Associate in Financial	L / Future Start	5/1/2006	5/1/2006	1/6/2003		(561)555-1947	
										Day	**10**
Night											

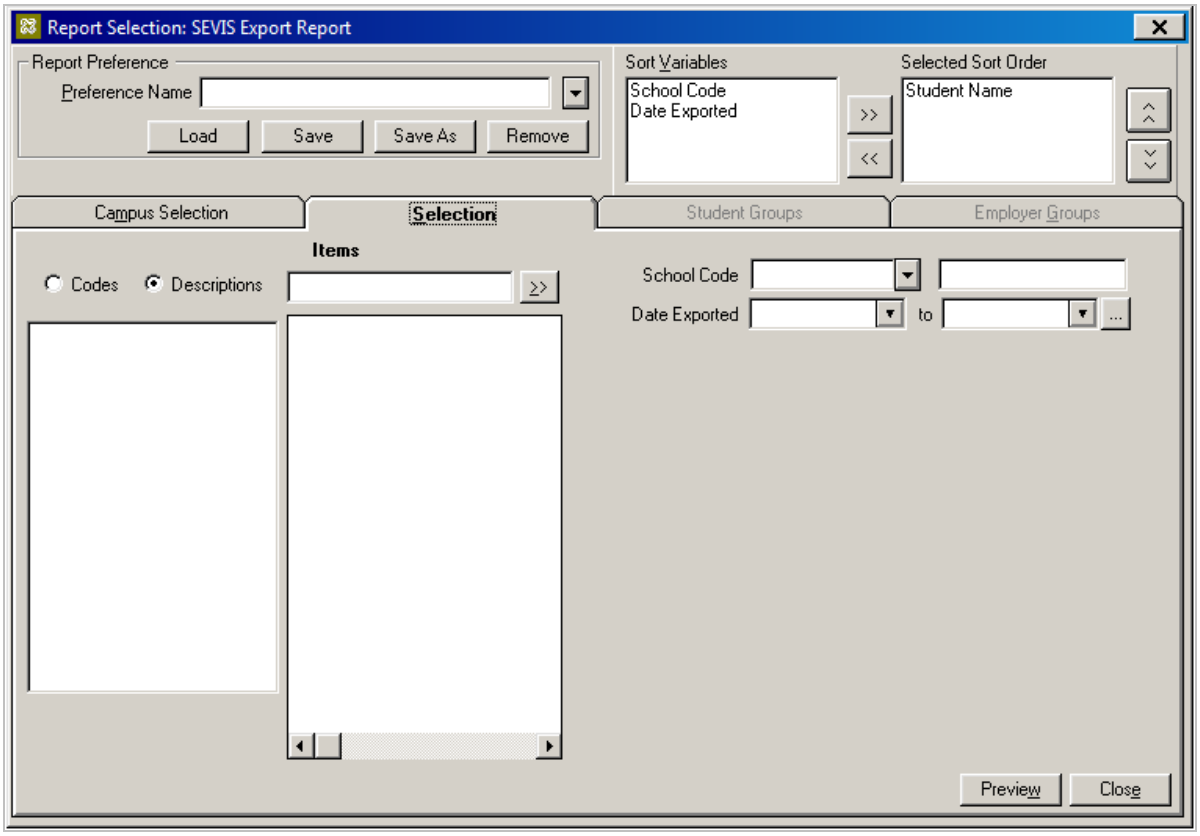
Campus Management — Page 1 of 5

SEVIS Export Report

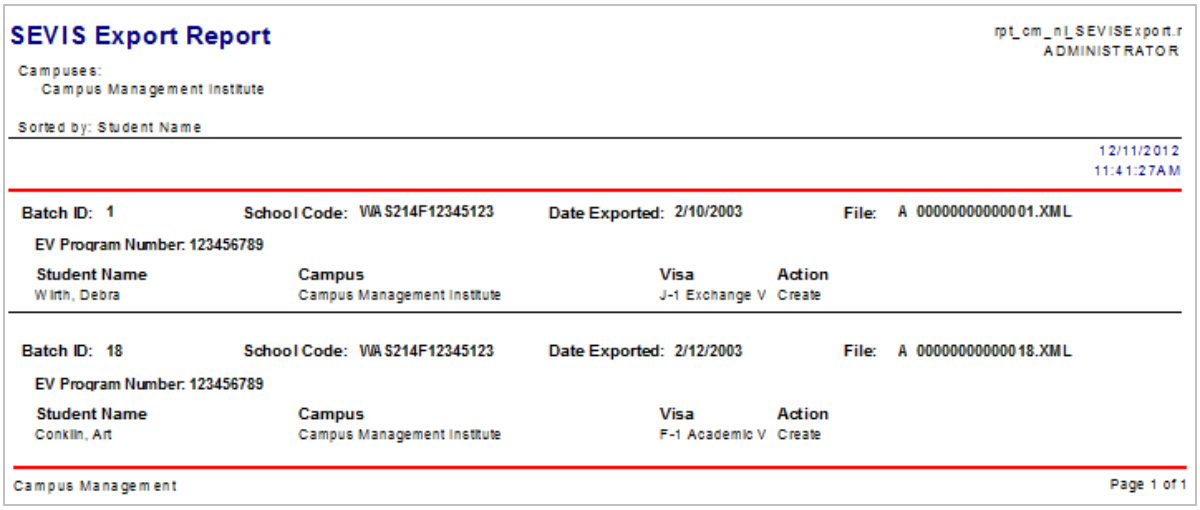
The Student and Exchange Visitor Information System (SEVIS) Export report lists the data that is exported from CampusNexus Student into the SEVIS system.

To run the report:

1. Navigate to **Reports > Contact Manager > International Reports > SEVIS Export Report**. The Report Selection: SEVIS Export Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. Click **Preview**. The report is assembled and displayed in the Report Viewer.



SEVIS Export Report

rpt_cm_nl_SEVISExport.r
ADMINISTRATOR

Campuses:
Campus Management Institute

Sorted by: Student Name

12/11/2012
11:41:27AM

Batch ID: 1 **School Code:** WAS214F12345123 **Date Exported:** 2/10/2003 **File:** A 00000000000001.XML

EV Program Number: 123456789

Student Name	Campus	Visa	Action
Wirth, Debra	Campus Management Institute	J-1 Exchange V	Create

Batch ID: 18 **School Code:** WAS214F12345123 **Date Exported:** 2/12/2003 **File:** A 00000000000018.XML

EV Program Number: 123456789

Student Name	Campus	Visa	Action
Conklin, Art	Campus Management Institute	F-1 Academic V	Create

Campus Management

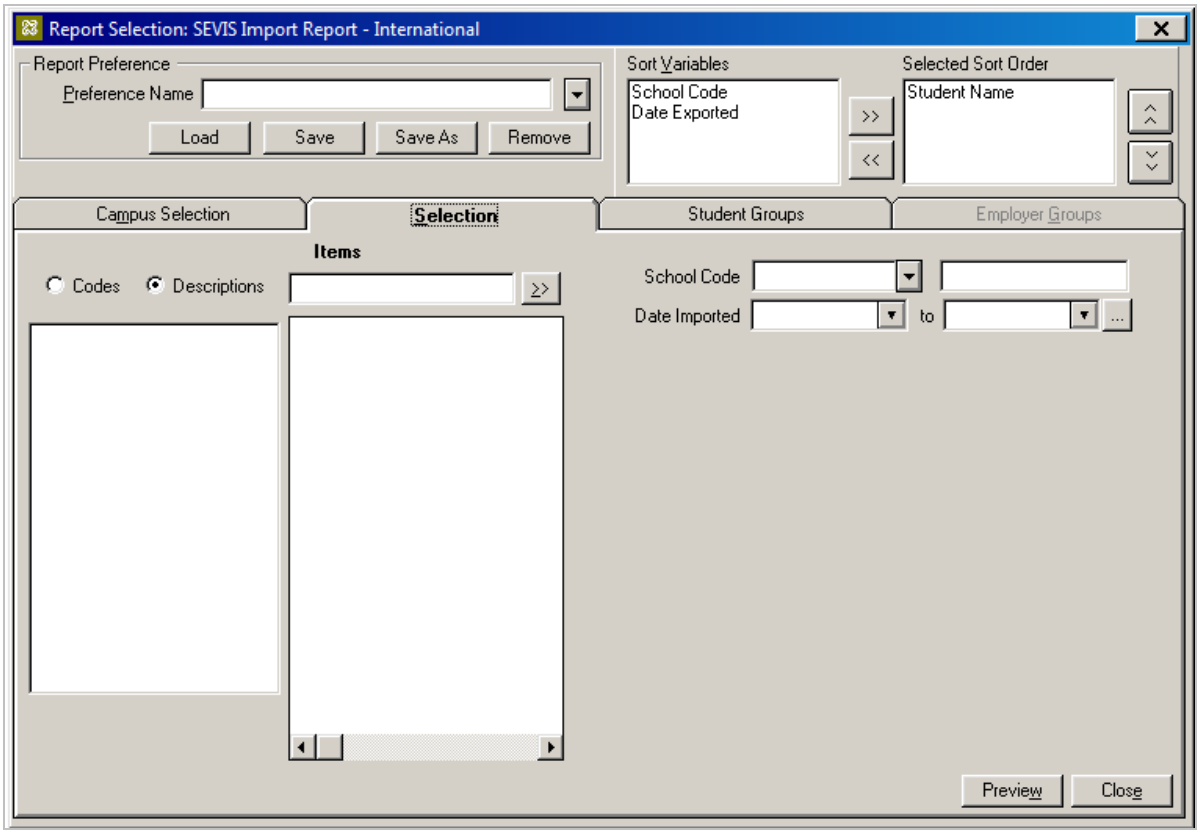
Page 1 of 1

SEVIS Import Report

The Student and Exchange Visitor Information System (SEVIS) Import report lists the data that is imported from the SEVIS system into CampusNexus Student.

To run the report:

1. Navigate to **Reports > Contact Manager > International Reports > SEVIS Import Report**. The Report Selection: SEVIS Import Report - International form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

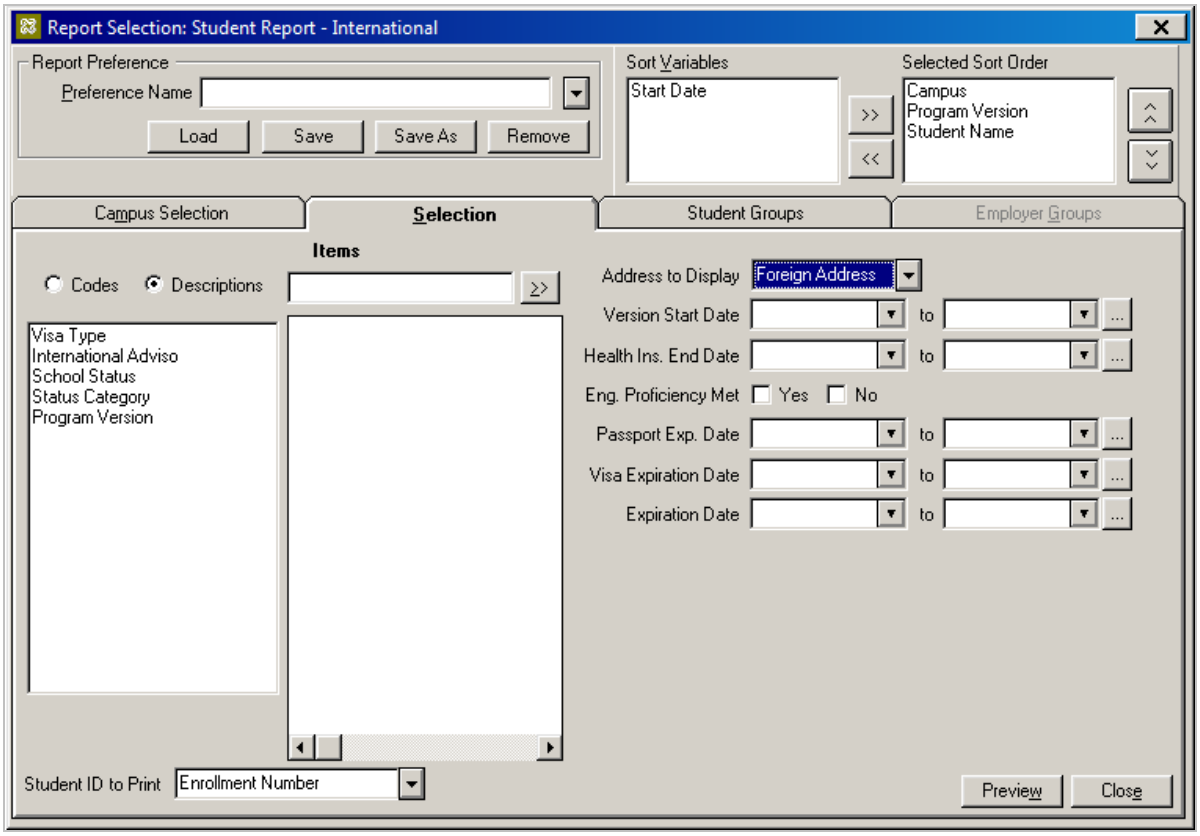
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

Student Report

This report provides basic information about international students.

To run the report:

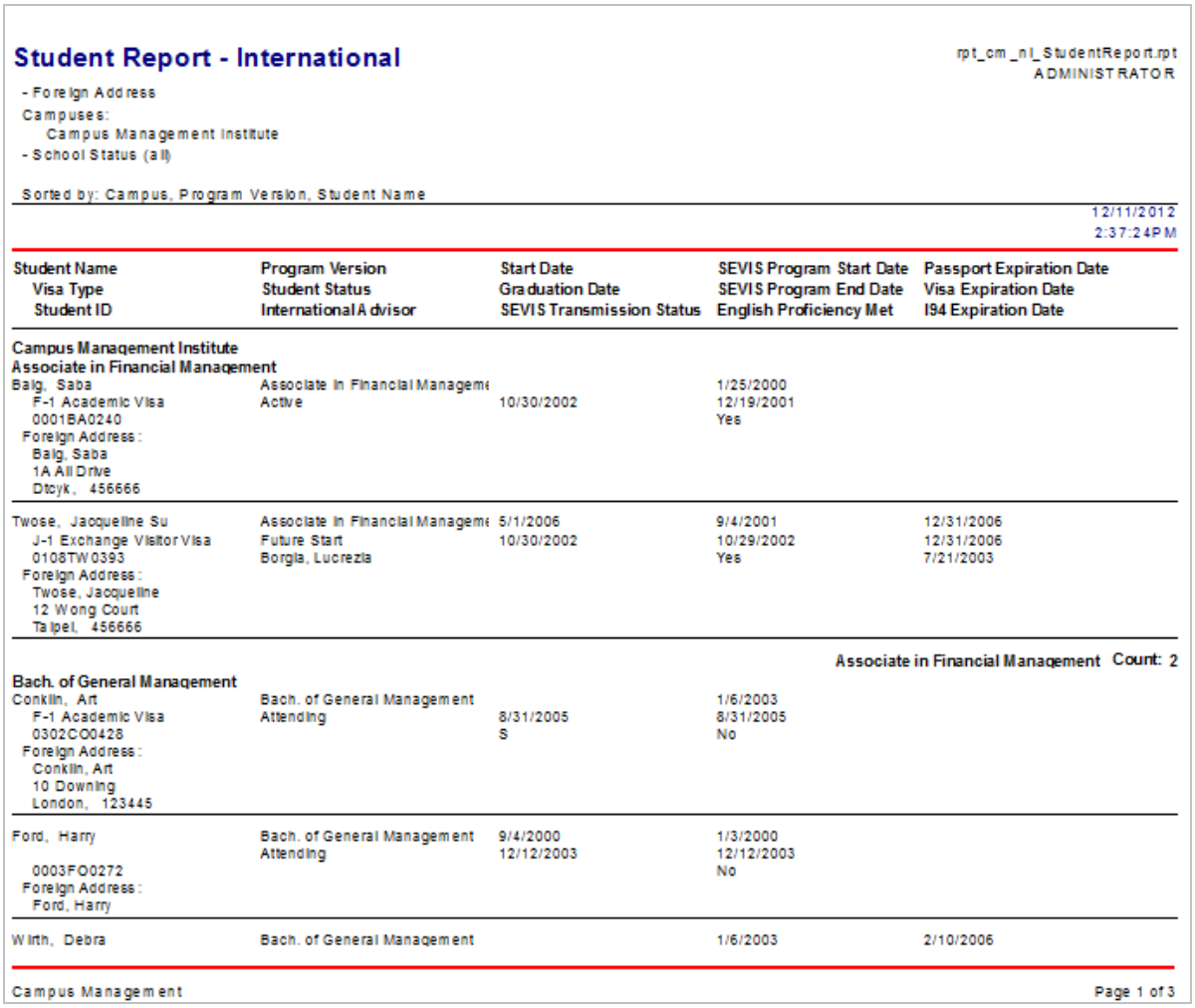
1. Navigate to **Reports > Contact Manager > International Reports > Student Report**. The Report Selection: Student Report - International form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.



Student Report - International

rpt_cm_nl_StudentReport.rpt
ADMINISTRATOR

- Foreign Address

Campuses:
Campus Management Institute
- School Status (all)

Sorted by: Campus, Program Version, Student Name

12/11/2012
2:37:24PM

Student Name / Visa Type / Student ID	Program Version / Student Status / International Advisor	Start Date / Graduation Date / SEVIS Transmission Status	SEVIS Program Start Date / SEVIS Program End Date / English Proficiency Met	Passport Expiration Date / Visa Expiration Date / I94 Expiration Date
Campus Management Institute				
Associate in Financial Management				
Baig, Saba	Associate in Financial Manageme		1/25/2000	
F-1 Academic Visa	Active	10/30/2002	12/19/2001	
0001BA0240			Yes	
Foreign Address:				
Baig, Saba				
1A All Drive				
Dtcyk, 456666				
Twose, Jacqueline Su	Associate in Financial Manageme	5/1/2006	9/4/2001	12/31/2006
J-1 Exchange Visitor Visa	Future Start	10/30/2002	10/29/2002	12/31/2006
0106TW0393	Borgia, Lucrezia		Yes	7/21/2003
Foreign Address:				
Twose, Jacqueline				
12 Wong Court				
Taipei, 456666				
			Associate in Financial Management Count: 2	
Bach. of General Management				
Conklin, Art	Bach. of General Management		1/6/2003	
F-1 Academic Visa	Attending	8/31/2005	8/31/2005	
0302CO0428		S	No	
Foreign Address:				
Conklin, Art				
10 Downing				
London, 123445				
Ford, Harry	Bach. of General Management	9/4/2000	1/3/2000	
	Attending	12/12/2003	12/12/2003	
0003FO0272			No	
Foreign Address:				
Ford, Harry				
Wirth, Debra	Bach. of General Management		1/6/2003	2/10/2006

Campus Management

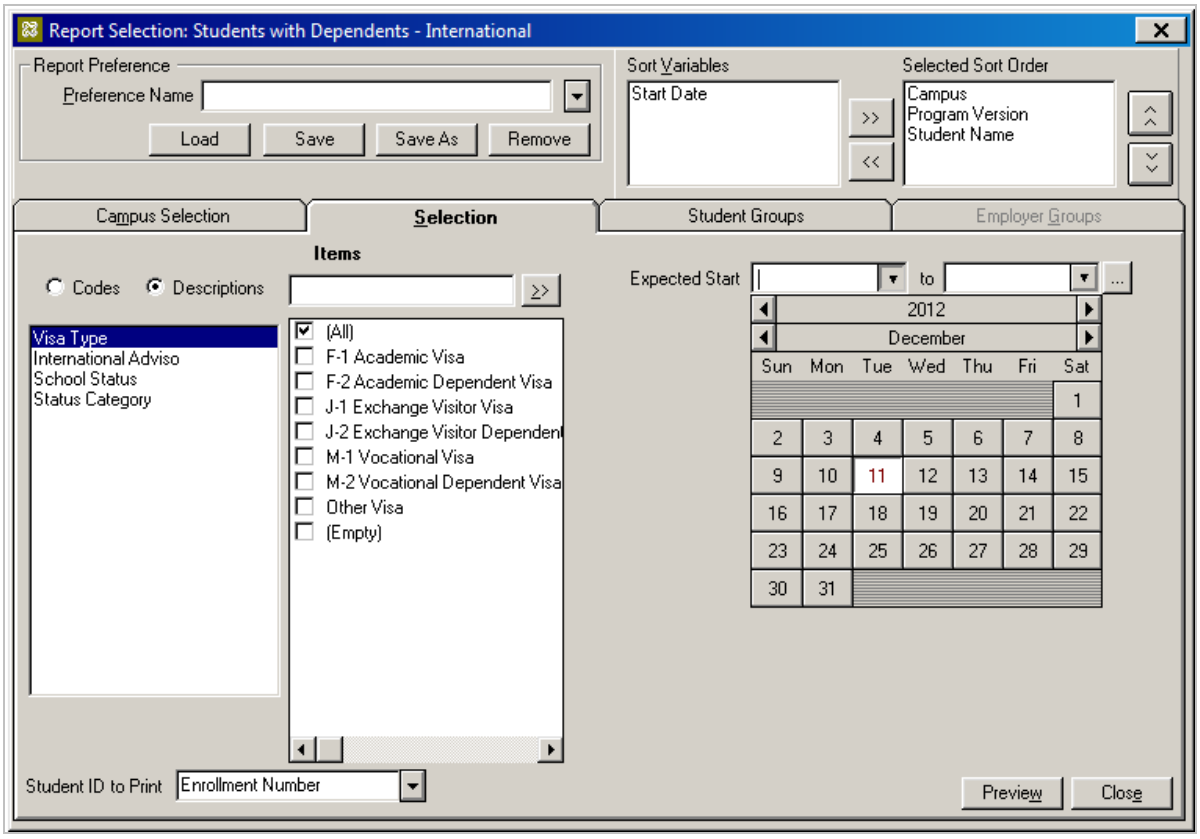
Page 1 of 3

Students with Dependents

This report provides basic information about international students and their dependents.

To run the report:

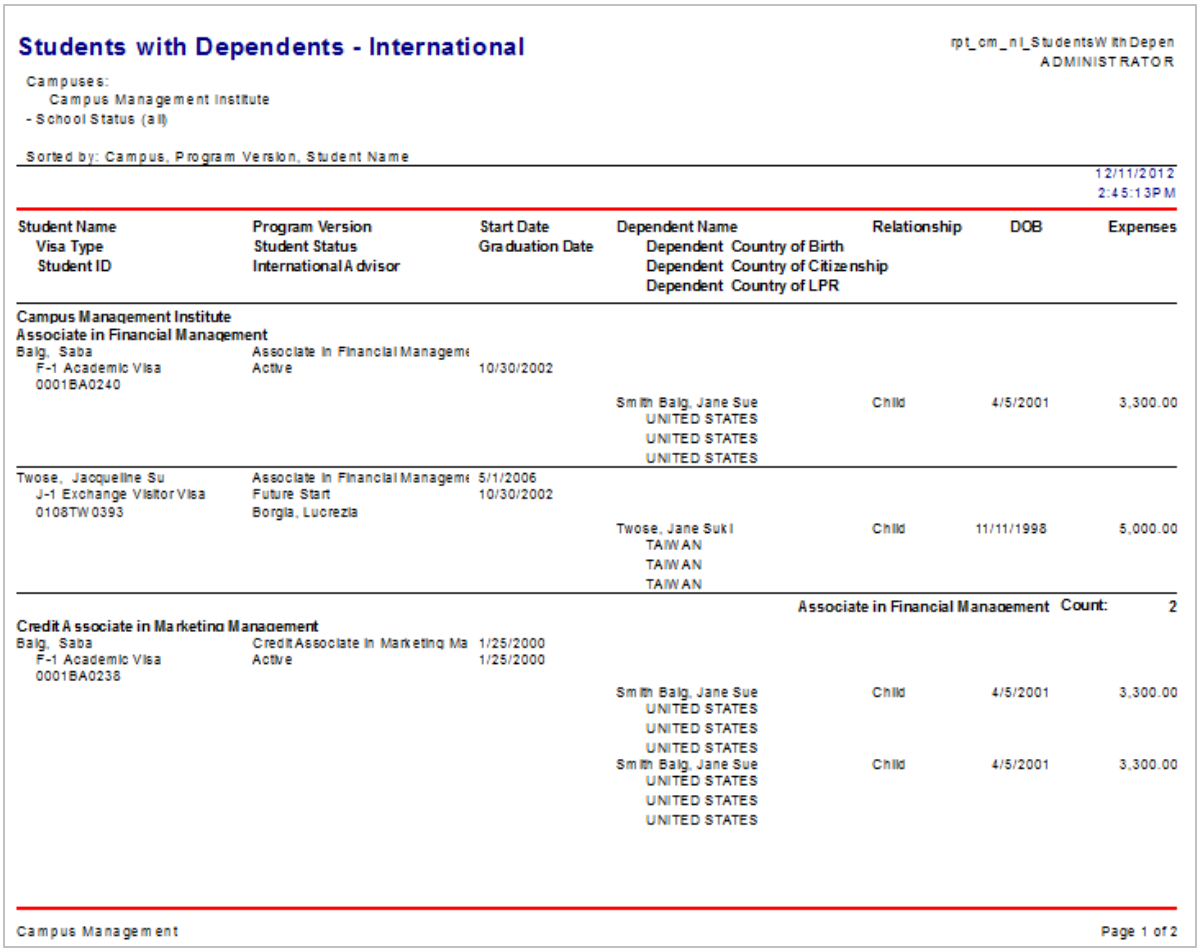
1. Navigate to **Reports > Contact Manager > International Reports > Students with Dependents**. The Report Selection: Students with Dependents - International form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Select appropriate options on the Selection tab.



Students with Dependents - International

rpt_cm_nl_StudentsWithDepen
ADMINISTRATOR

Campuses:
Campus Management Institute
- School Status (all)

Sorted by: Campus, Program Version, Student Name

12/11/2012
2:45:13PM

Student Name / Visa Type / Student ID	Program Version / Student Status / International Advisor	Start Date / Graduation Date	Dependent Name / Dependent Country of Birth / Dependent Country of Citizenship / Dependent Country of LPR	Relationship	DOB	Expenses
Campus Management Institute						
Associate in Financial Management						
Balg, Saba	Associate in Financial Manageme					
F-1 Academic Visa	Active	10/30/2002				
0001BA0240						
			Smith Balg, Jane Sue	Child	4/5/2001	3,300.00
			UNITED STATES			
			UNITED STATES			
			UNITED STATES			
Twose, Jacqueline Su	Associate in Financial Manageme	5/1/2006				
J-1 Exchange Visitor Visa	Future Start	10/30/2002				
0108TW0393	Borgia, Lucrezia					
			Twose, Jane Suki	Child	11/11/1998	5,000.00
			TAIWAN			
			TAIWAN			
			TAIWAN			
				Associate in Financial Management	Count:	2
Credit Associate in Marketing Management						
Balg, Saba	Credit Associate in Marketing Ma	1/25/2000				
F-1 Academic Visa	Active	1/25/2000				
0001BA0238						
			Smith Balg, Jane Sue	Child	4/5/2001	3,300.00
			UNITED STATES			
			UNITED STATES			
			UNITED STATES			
			Smith Balg, Jane Sue	Child	4/5/2001	3,300.00
			UNITED STATES			
			UNITED STATES			
			UNITED STATES			

Campus Management

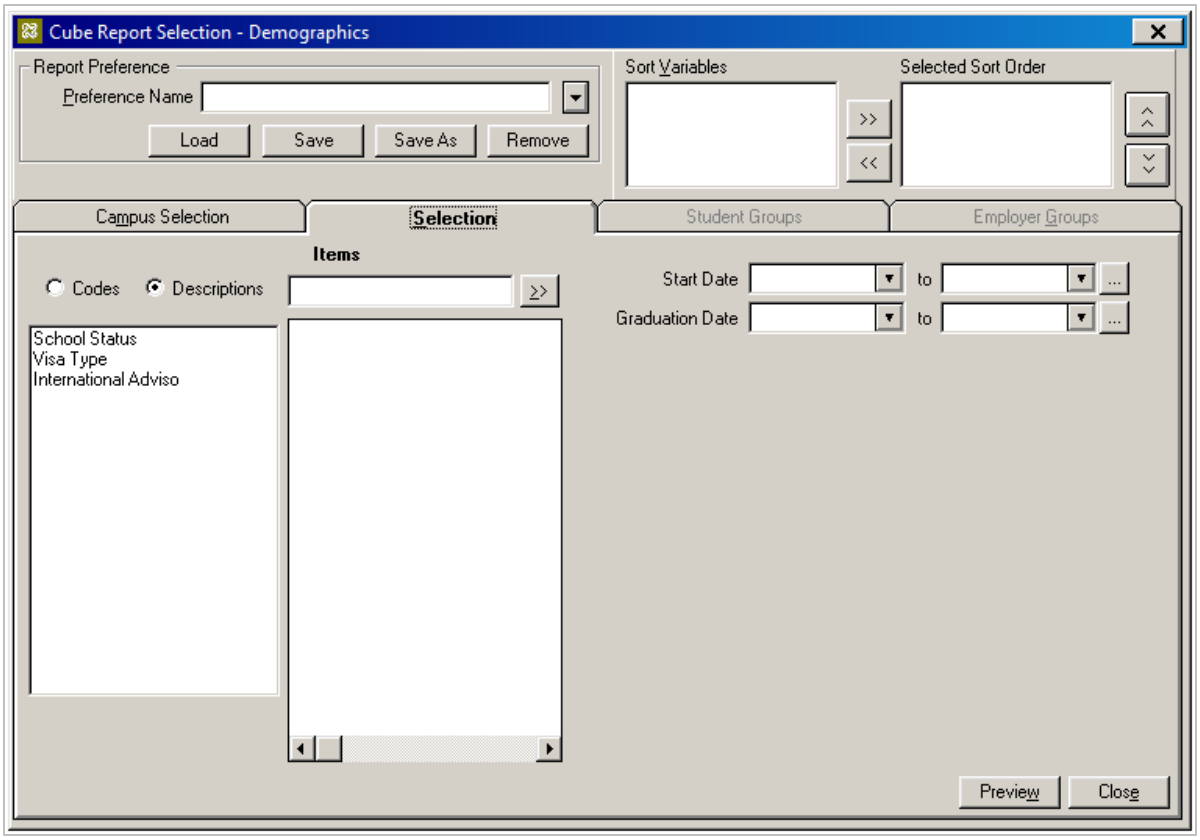
Page 1 of 2

Demographics

You can use the Demographics cube report to manipulate data from your international student records in many combinations.

To run the report:

1. Navigate to **Reports > Contact Manager > International Reports > Demographics**. The Cube Report Selection: Demographics form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



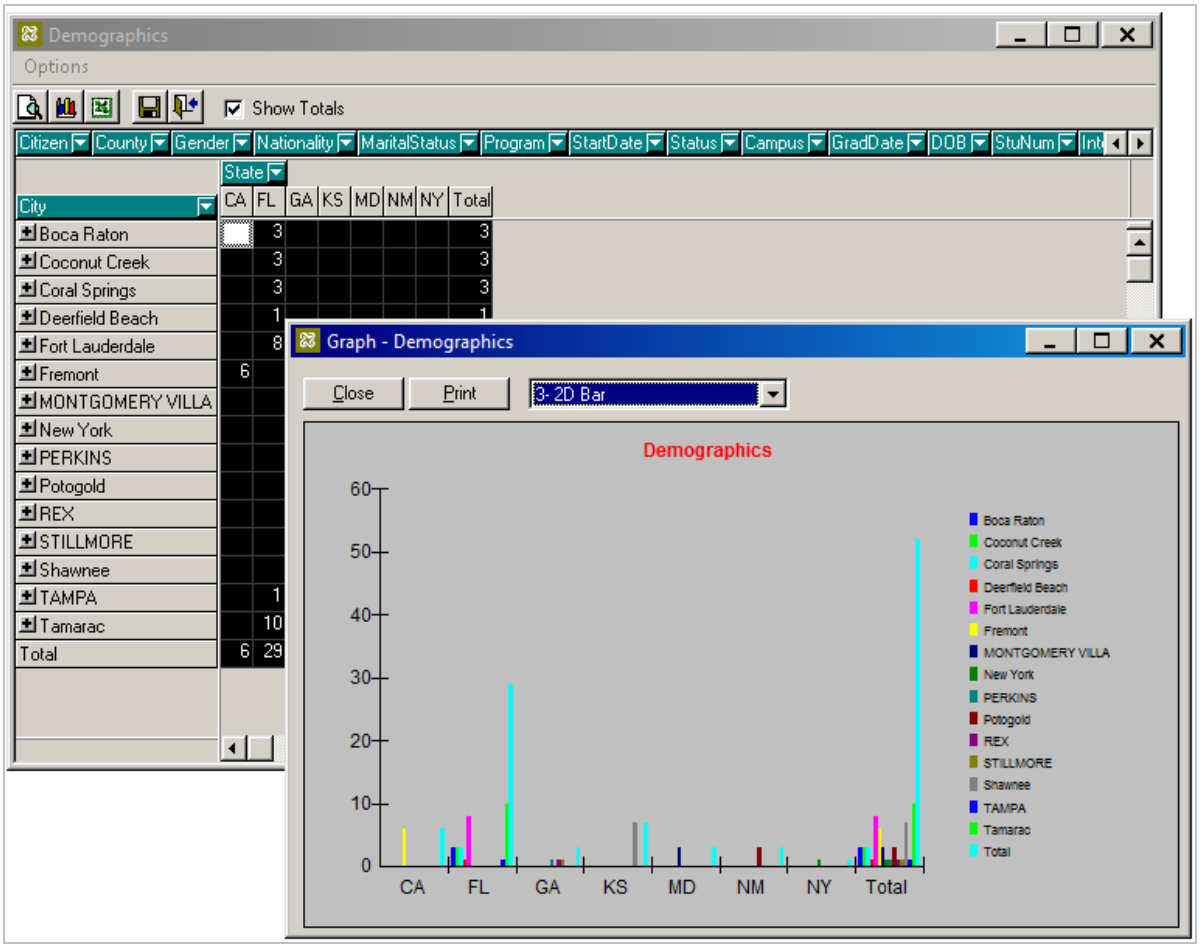
4. Click **Preview**. The report is assembled and displayed.

   The following variables are available for use in this cube report:

   - Name
   - Social Security Number (SSN)
   - Admissions Rep
   - Citizenship Status
   - County
   - Gender
   - Nationality
   - Marital Status
   - Program
   - Start Date
   - Status

- Campus
- Graduation Date
- Date of Birth (DOB)
- Student ID Number
- International Advisor
- Visa Type
- Visa Type Description
- City
- State

The cube is initialized with City as the Y axis (rows) and State as the X axis (columns). Drag the variables to the vertical or horizontal axes as needed to get the cross-tabulated spreads.



Admissions Reports

Navigate to **Reports > Admissions** to access the following Admissions reports:

- Admissions Campus Lead Conversion
- Admissions Deposits
- Admissions Rep Lead Conversion
- Data Changes Report
- Entrance Test Batch Import Detail
- Entrance Test Detail Report
- Entrance Tests
- High School Contacts
- Interviews not Enrolled
- Lead Expenses by Category
- Lead Master Listing Detail
- Lead Master Listing Summary
- Lead Source Performance
- Leads not Interviewed
- Start Date
- Starts - Actual vs. Budget
- Student Previous Education
- Lead Summary by Source (cube report)
- Leads Analysis (cube report)
- Start Date Enrollment Stats (cube report)

Note: The System Administrator must set up security rights to view, print, or export reports. Staff members and staff groups must be given security rights to view, print, and/or export reports. This does not apply to custom reports.

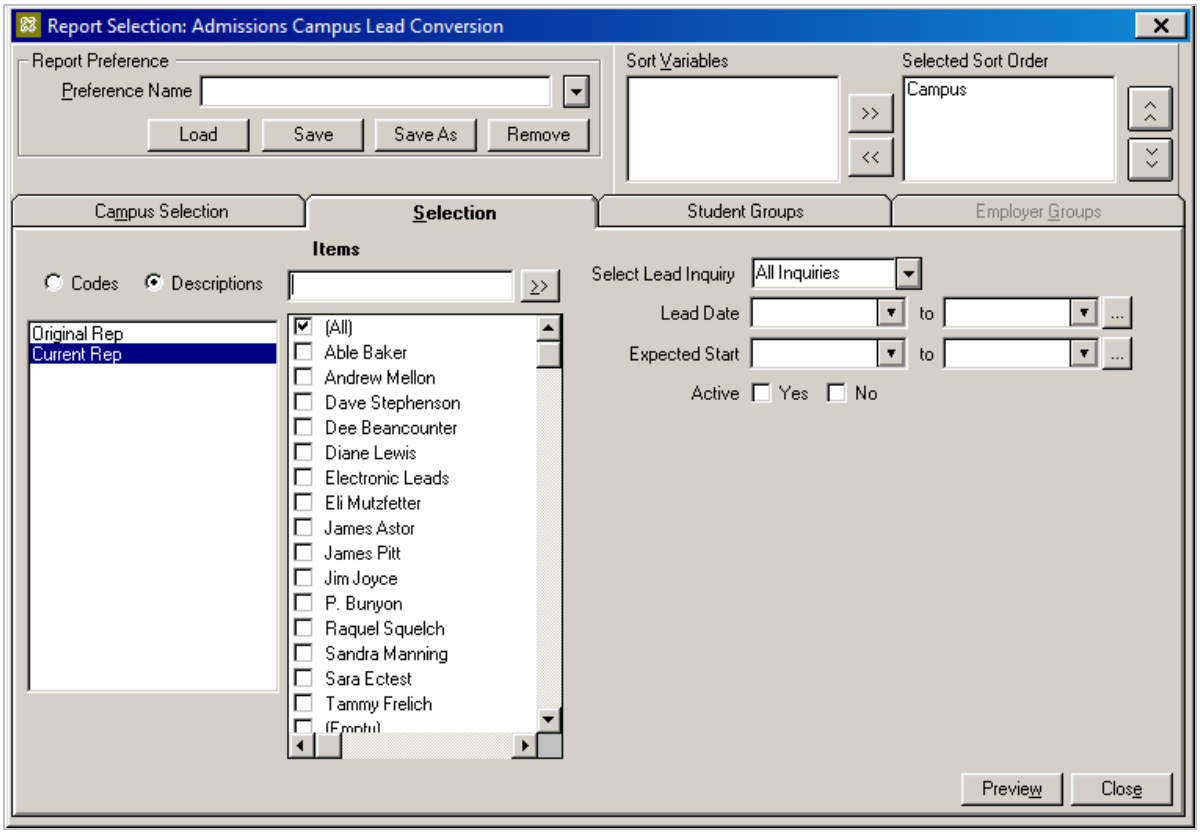
Admissions Campus Lead Conversion

This report lists the leads converted by each admissions representative.

To run the report:

1. Navigate to **Reports > Admissions > Admissions Campus Lead Conversion**. The Report Selection: Admissions Campus Lead Conversion form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

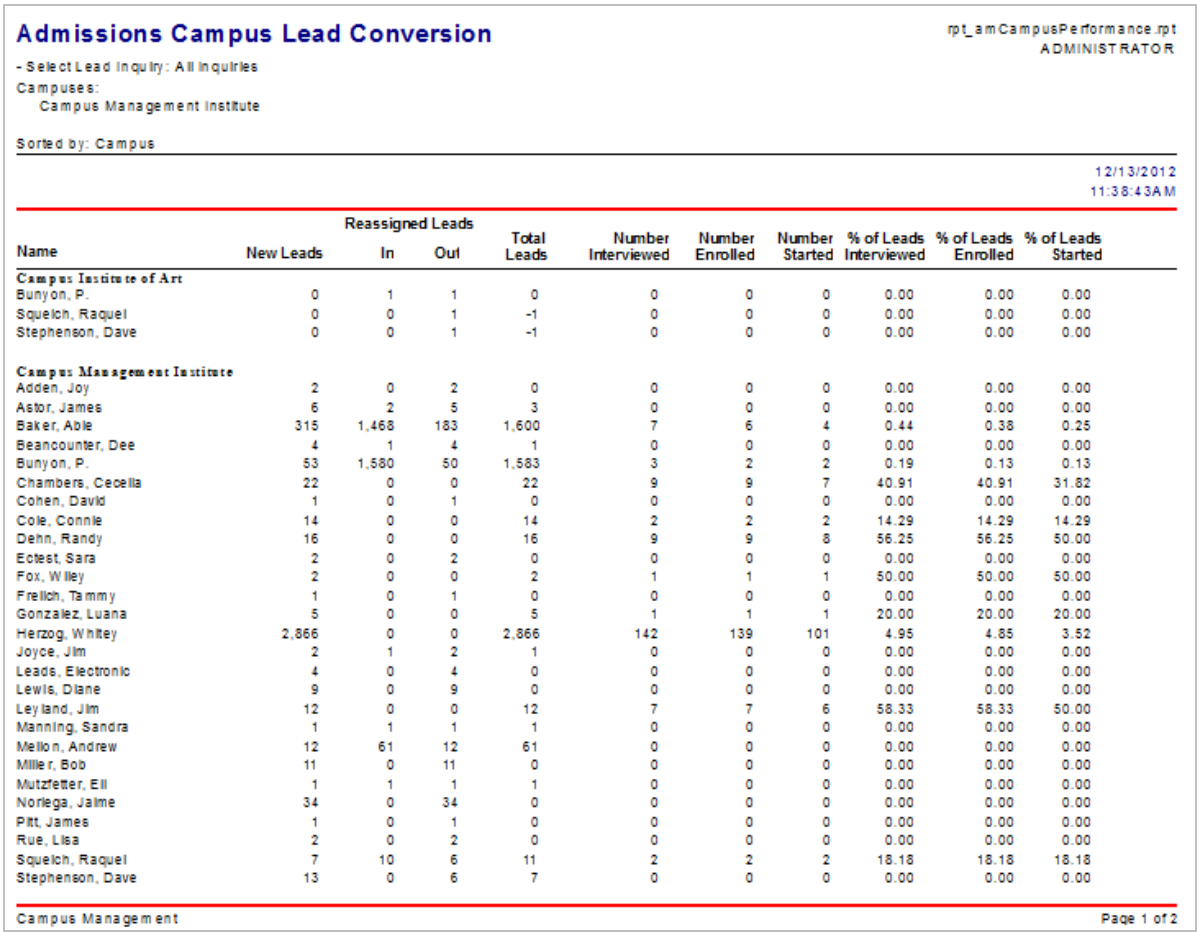
   Note: The Select Lead Inquiry drop-down list on the Report Selection form provides options to display and print multiple lead inquiries if the Track Multiple Leads Entry flag has been enabled. See Campus Allow for setup instructions.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.



Admissions Campus Lead Conversion

rpt_amCampusPerformance.rpt
ADMINISTRATOR

- Select Lead Inquiry: All Inquiries
Campuses:
Campus Management Institute

Sorted by: Campus

12/13/2012
11:38:43AM

Name	New Leads	Reassigned Leads In	Reassigned Leads Out	Total Leads	Number Interviewed	Number Enrolled	Number Started	% of Leads Interviewed	% of Leads Enrolled	% of Leads Started
Campus Institute of Art										
Bunyon, P.	0	1	1	0	0	0	0	0.00	0.00	0.00
Squelch, Raquel	0	0	1	-1	0	0	0	0.00	0.00	0.00
Stephenson, Dave	0	0	1	-1	0	0	0	0.00	0.00	0.00
Campus Management Institute										
Adden, Joy	2	0	2	0	0	0	0	0.00	0.00	0.00
Astor, James	6	2	5	3	0	0	0	0.00	0.00	0.00
Baker, Able	315	1,468	183	1,600	7	6	4	0.44	0.38	0.25
Beancounter, Dee	4	1	4	1	0	0	0	0.00	0.00	0.00
Bunyon, P.	53	1,580	50	1,583	3	2	2	0.19	0.13	0.13
Chambers, Cecelia	22	0	0	22	9	9	7	40.91	40.91	31.82
Cohen, David	1	0	1	0	0	0	0	0.00	0.00	0.00
Cole, Connie	14	0	0	14	2	2	2	14.29	14.29	14.29
Dehn, Randy	16	0	0	16	9	9	8	56.25	56.25	50.00
Ectest, Sara	2	0	2	0	0	0	0	0.00	0.00	0.00
Fox, Willey	2	0	0	2	1	1	1	50.00	50.00	50.00
Freilich, Tammy	1	0	1	0	0	0	0	0.00	0.00	0.00
Gonzalez, Luana	5	0	0	5	1	1	1	20.00	20.00	20.00
Herzog, Whitey	2,866	0	0	2,866	142	139	101	4.95	4.85	3.52
Joyce, Jim	2	1	2	1	0	0	0	0.00	0.00	0.00
Leads, Electronic	4	0	4	0	0	0	0	0.00	0.00	0.00
Lewis, Diane	9	0	9	0	0	0	0	0.00	0.00	0.00
Leyland, Jim	12	0	0	12	7	7	6	58.33	58.33	50.00
Manning, Sandra	1	1	1	1	0	0	0	0.00	0.00	0.00
Mellon, Andrew	12	61	12	61	0	0	0	0.00	0.00	0.00
Miller, Bob	11	0	11	0	0	0	0	0.00	0.00	0.00
Mutzfetter, Ell	1	1	1	1	0	0	0	0.00	0.00	0.00
Noriega, Jaime	34	0	34	0	0	0	0	0.00	0.00	0.00
Pitt, James	1	0	1	0	0	0	0	0.00	0.00	0.00
Rue, Lisa	2	0	2	0	0	0	0	0.00	0.00	0.00
Squelch, Raquel	7	10	6	11	2	2	2	18.18	18.18	18.18
Stephenson, Dave	13	0	6	7	0	0	0	0.00	0.00	0.00

Campus Management

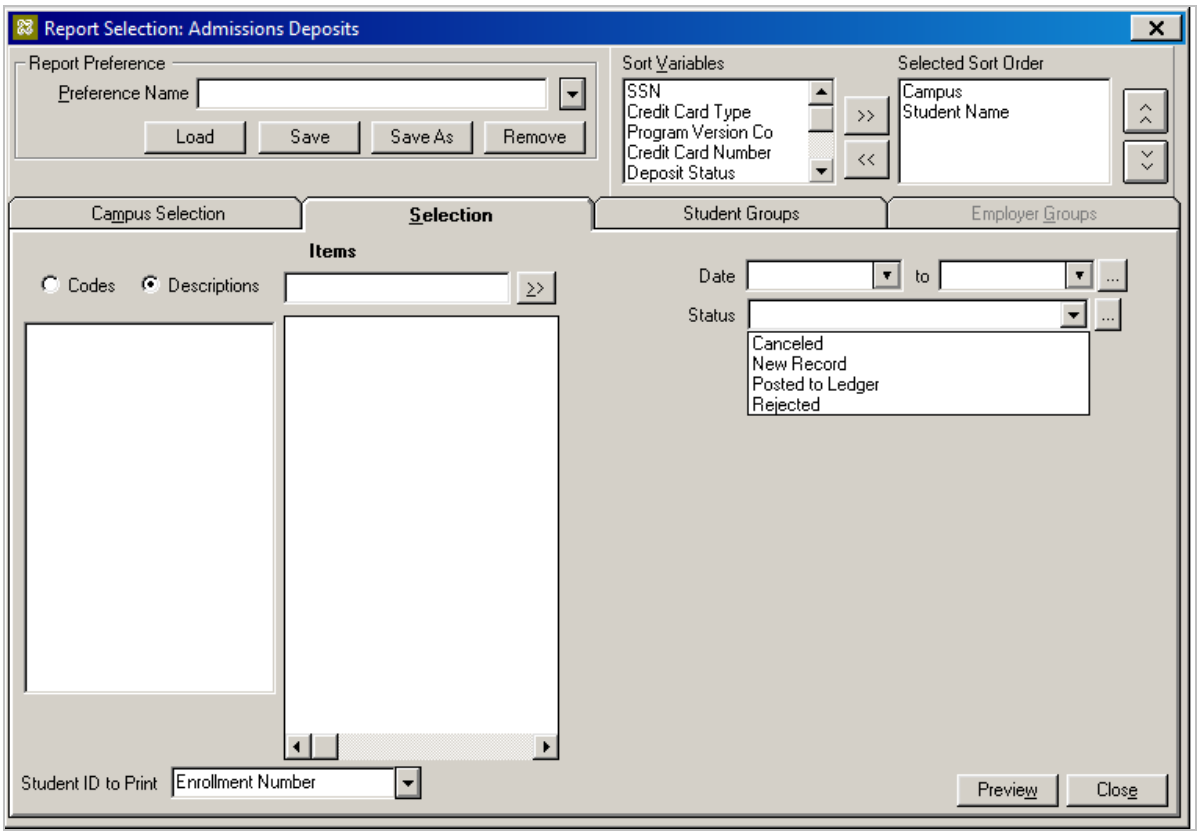
Page 1 of 2

Admissions Deposits

This report lists the deposits received by the Admissions department. Housing deposits are included on this report. Deposit Status Codes include New (N), Posted (P), and Rejected (R).

To run the report:

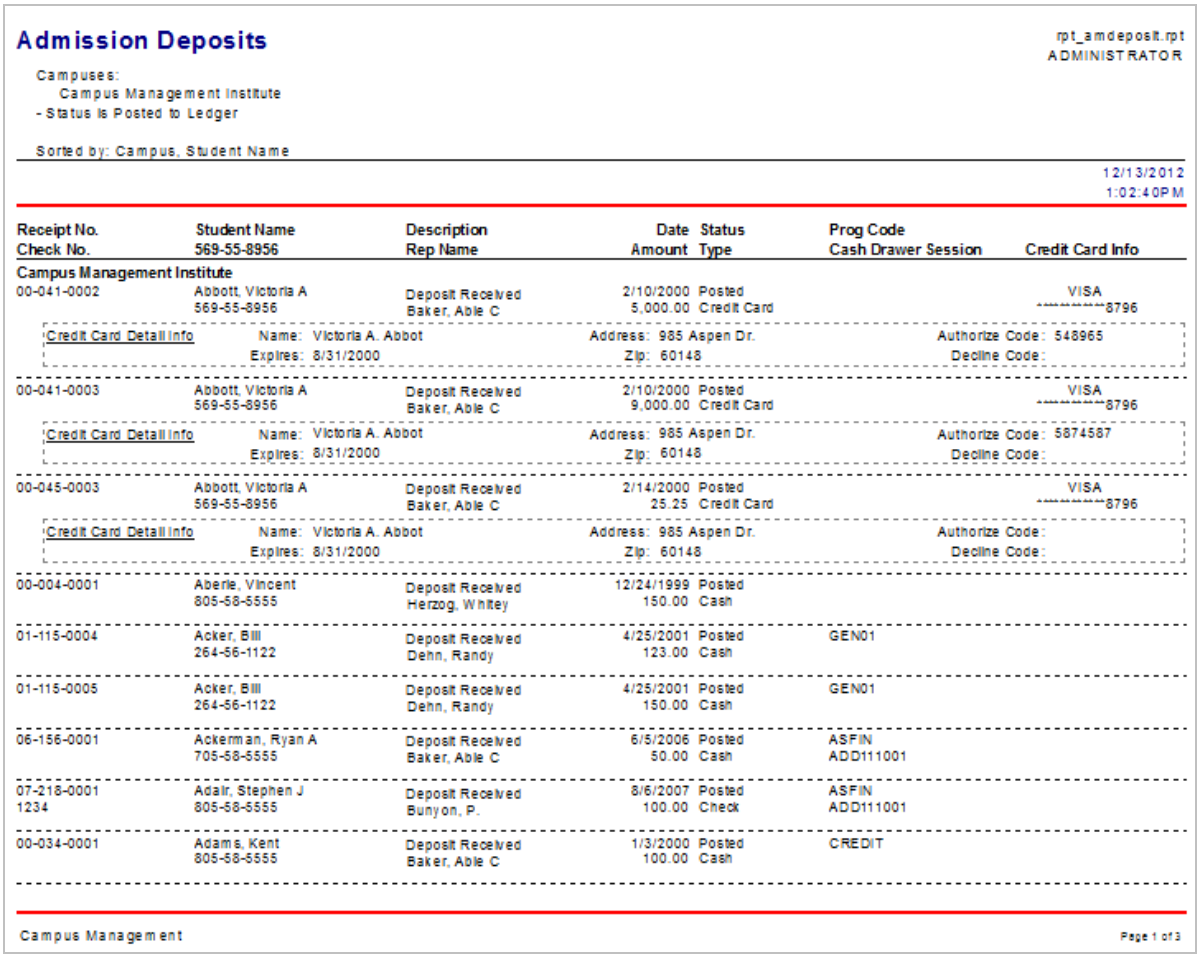
1. Navigate to **Reports > Admissions > Admissions Deposits**. The Report Selection: Admissions Deposits form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.



Admission Deposits

rpt_amdeposit.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- Status Is Posted to Ledger

Sorted by: Campus, Student Name

12/13/2012
1:02:40PM

Receipt No. / Check No.	Student Name / 569-55-8956	Description / Rep Name	Date / Amount	Status / Type	Prog Code / Cash Drawer Session	Credit Card Info
Campus Management Institute						
00-041-0002	Abbott, Victoria A 569-55-8956	Deposit Received Baker, Able C	2/10/2000 5,000.00	Posted Credit Card		VISA **********8796
Credit Card Detail Info	Name: Victoria A. Abbot Expires: 8/31/2000		Address: 985 Aspen Dr. Zip: 60148		Authorize Code: 548965 Decline Code:	
00-041-0003	Abbott, Victoria A 569-55-8956	Deposit Received Baker, Able C	2/10/2000 9,000.00	Posted Credit Card		VISA **********8796
Credit Card Detail Info	Name: Victoria A. Abbot Expires: 8/31/2000		Address: 985 Aspen Dr. Zip: 60148		Authorize Code: 5874587 Decline Code:	
00-045-0003	Abbott, Victoria A 569-55-8956	Deposit Received Baker, Able C	2/14/2000 25.25	Posted Credit Card		VISA **********8796
Credit Card Detail Info	Name: Victoria A. Abbot Expires: 8/31/2000		Address: 985 Aspen Dr. Zip: 60148		Authorize Code: Decline Code:	
00-004-0001	Aberle, Vincent 805-58-5555	Deposit Received Herzog, Whitey	12/24/1999 150.00	Posted Cash		
01-115-0004	Acker, Bill 264-56-1122	Deposit Received Dehn, Randy	4/25/2001 123.00	Posted Cash	GEN01	
01-115-0005	Acker, Bill 264-56-1122	Deposit Received Dehn, Randy	4/25/2001 150.00	Posted Cash	GEN01	
06-156-0001	Ackerman, Ryan A 705-58-5555	Deposit Received Baker, Able C	6/5/2006 50.00	Posted Cash	ASFIN ADD111001	
07-218-0001 1234	Adair, Stephen J 805-58-5555	Deposit Received Bunyon, P.	8/6/2007 100.00	Posted Check	ASFIN ADD111001	
00-034-0001	Adams, Kent 805-58-5555	Deposit Received Baker, Able C	1/3/2000 100.00	Posted Cash	CREDIT	

Campus Management

Page 1 of 3

Admissions Rep Lead Conversion

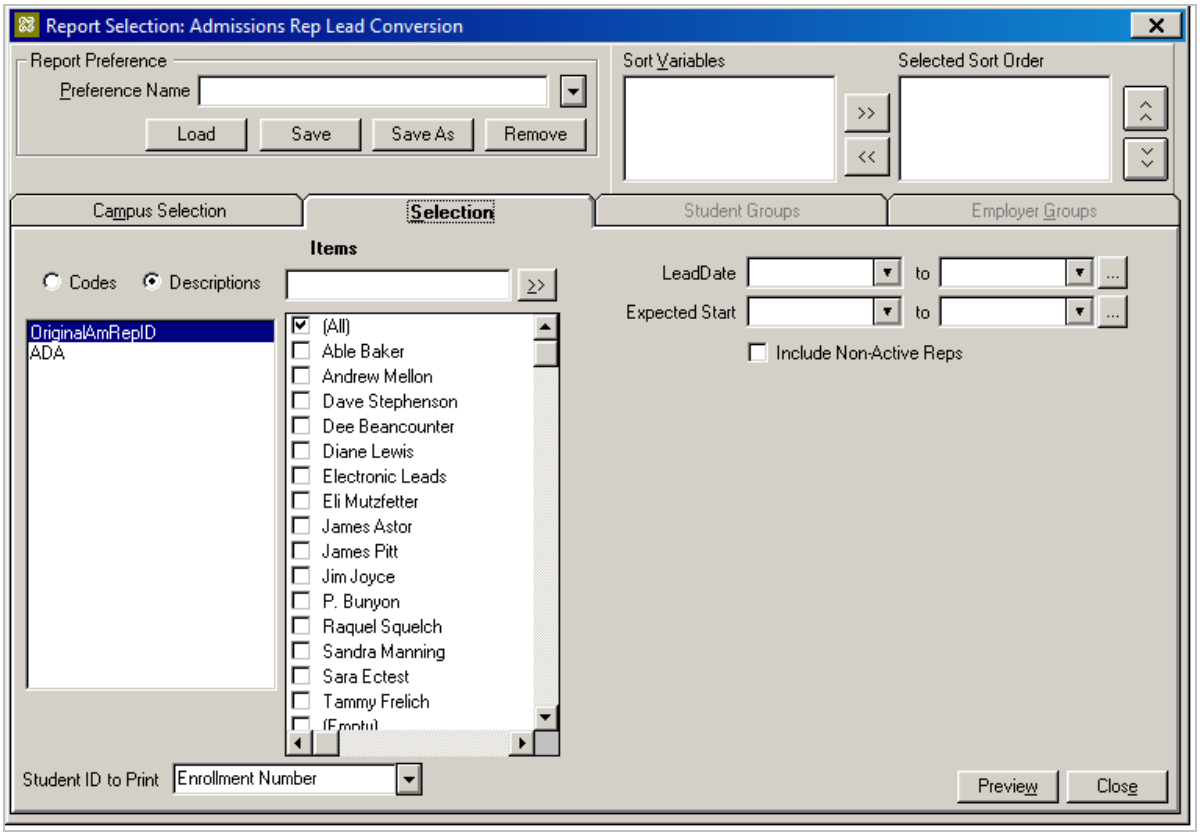
This report (formerly known as Admissions Rep Performance) summarizes Admissions Rep activity with one line per representative.

To run the report:

1. Navigate to **Reports > Admissions > Admissions Rep Lead Conversion**. The Report Selection: Admissions Rep Lead Conversion form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   You can select the campus group, school status, and reps to appear on the report and enter a range of lead dates. You can also choose to include non-active reps.

   If you filter by school status, the filter only limits the lead statuses that appear on the report not the other statuses. If a student status is not in the Lead category, the student still appears on the report if the student meets the remainder of the report selection criteria.

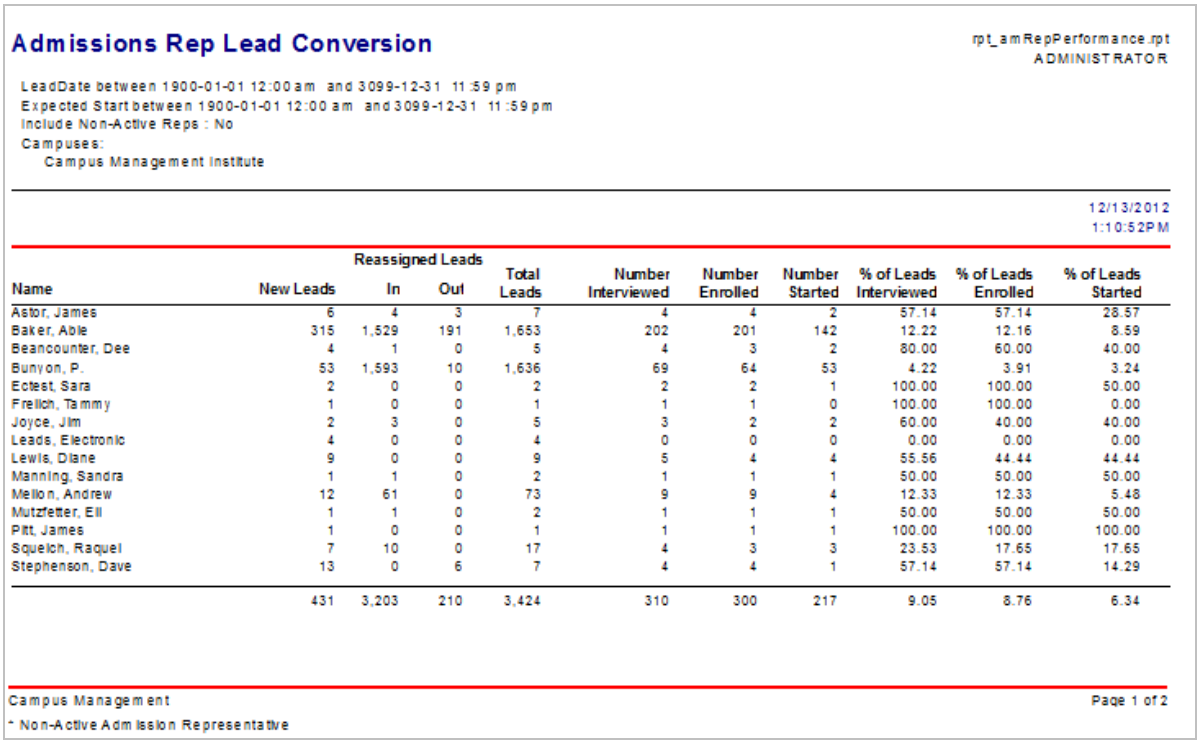


4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

- Name: Rep staff name.
- New Leads: This column is calculated by summing all rows in the Student master table where the Original Rep ID equals the rep's Rep ID and all other report criteria is satisfied.
- Reassigned In: This is the sum of all rows in the Prospect Admissions Rep table where the New Admissions Rep ID equals the rep's Rep ID, and the Effective Date is within the report date range.
- Reassigned Out: This is the sum of all rows in the Prospect Admissions Rep table where the Old Admissions Rep ID equals the rep's Rep ID, and the Effective Date is within report date range.
- Total Leads: New Leads plus Reassigned In minus Reassigned Out.
- Number Interviewed: The program adds 1 if a record exists in the Status Change table for the student where the Status is not U or C, and the New Status ID joins to a row in the Status table where the Code equals "INT" or "APPREC", or the Status Category is "E", "N", "A", "T" or "P".
- Number Enrolled: The program adds 1 if a record exists in the Status Change table for the student where the Status is not U or C, and the New Status ID joins to a row in the Status table where the Status Category is "E", "N", "A", "T" or "P". This column will list the number of leads who actually began their program.
- % Leads Interviewed: Number Interviewed divided by Total Leads
- % Leads Enrolled: Number Enrolled divided by Total Leads
- % Leads Started: Number Started divided by Total leads

The Admissions Rep Performance Graph is displayed and printed after the report body. The graph shows total leads, number of interview, number of enrollments, and number of starts by rep.



Admissions Rep Lead Conversion

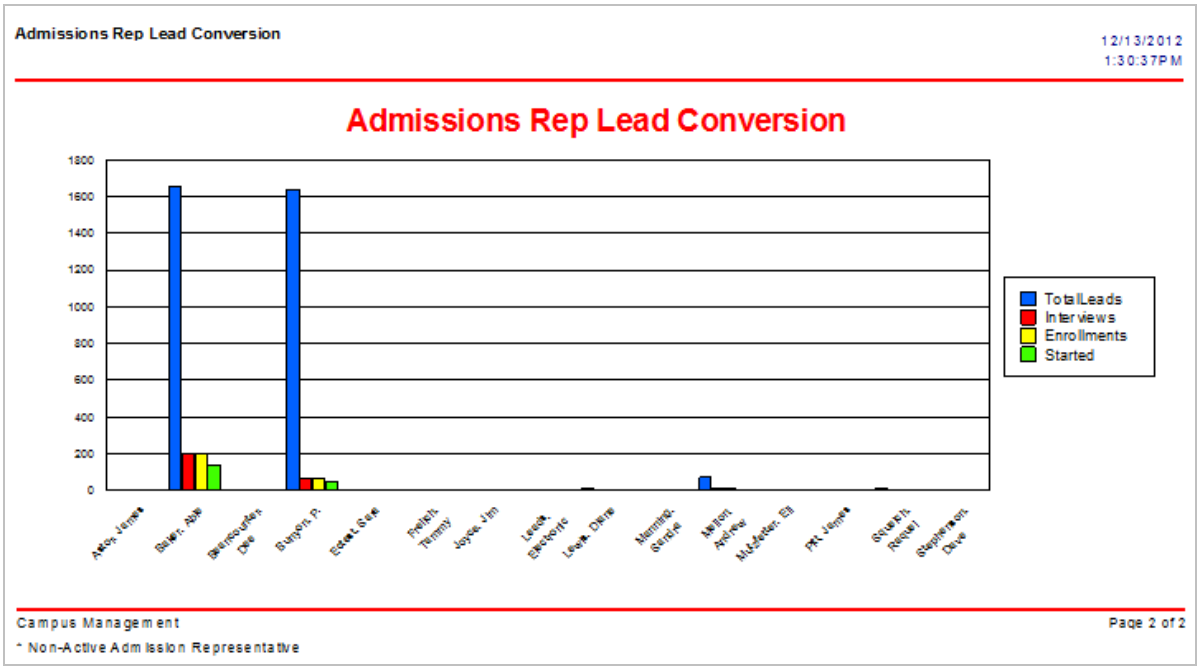
rpt_amRepPerformance.rpt
ADMINISTRATOR

LeadDate between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Expected Start between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Include Non-Active Reps : No
Campuses:
Campus Management Institute

12/13/2012
1:10:52 PM

Name	New Leads	Reassigned Leads In	Reassigned Leads Out	Total Leads	Number Interviewed	Number Enrolled	Number Started	% of Leads Interviewed	% of Leads Enrolled	% of Leads Started
Astor, James	6	4	3	7	4	4	2	57.14	57.14	28.57
Baker, Able	315	1,529	191	1,653	202	201	142	12.22	12.16	8.59
Beancounter, Dee	4	1	0	5	4	3	2	80.00	60.00	40.00
Bunyon, P.	53	1,593	10	1,636	69	64	53	4.22	3.91	3.24
Ectest, Sara	2	0	0	2	2	2	1	100.00	100.00	50.00
Frellch, Tammy	1	0	0	1	1	1	0	100.00	100.00	0.00
Joyce, Jim	2	3	0	5	3	2	2	60.00	40.00	40.00
Leads, Electronic	4	0	0	4	0	0	0	0.00	0.00	0.00
Lewis, Diane	9	0	0	9	5	4	4	55.56	44.44	44.44
Manning, Sandra	1	1	0	2	1	1	1	50.00	50.00	50.00
Mellon, Andrew	12	61	0	73	9	9	4	12.33	12.33	5.48
Mutzfetter, Ell	1	1	0	2	1	1	1	50.00	50.00	50.00
Pitt, James	1	0	0	1	1	1	1	100.00	100.00	100.00
Squelch, Raquel	7	10	0	17	4	3	3	23.53	17.65	17.65
Stephenson, Dave	13	0	6	7	4	4	1	57.14	57.14	14.29
	431	3,203	210	3,424	310	300	217	9.05	8.76	6.34

Campus Management
Page 1 of 2
* Non-Active Admission Representative


Admissions Rep Lead Conversion
12/13/2012
1:30:37PM
Admissions Rep Lead Conversion
1800
1600
1400
1200
1000
800
600
400
200
0
TotalLeads
Interviews
Enrollments
Started
Campus Management
Page 2 of 2
* Non-Active Admission Representative

Data Changes Report

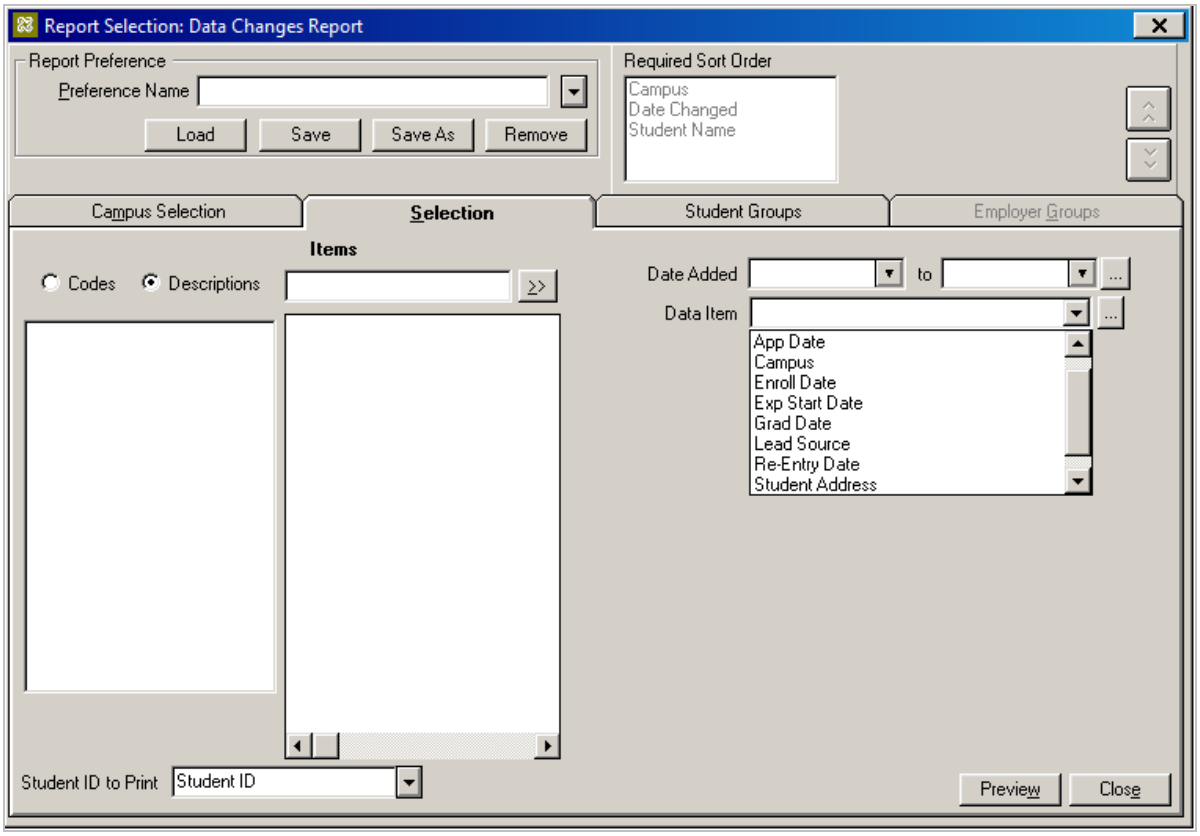
This report lists changes to the following data items:

- Application Date
- Campus
- Enrollment Date
- Expected Start Date
- Graduation Date
- Lead Source
- Re-Entry Date
- Student Address
- Student Phone

To run the report:

1. Navigate to **Reports > Admissions > Data Changes Report**. The Report Selection: Data Changes Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

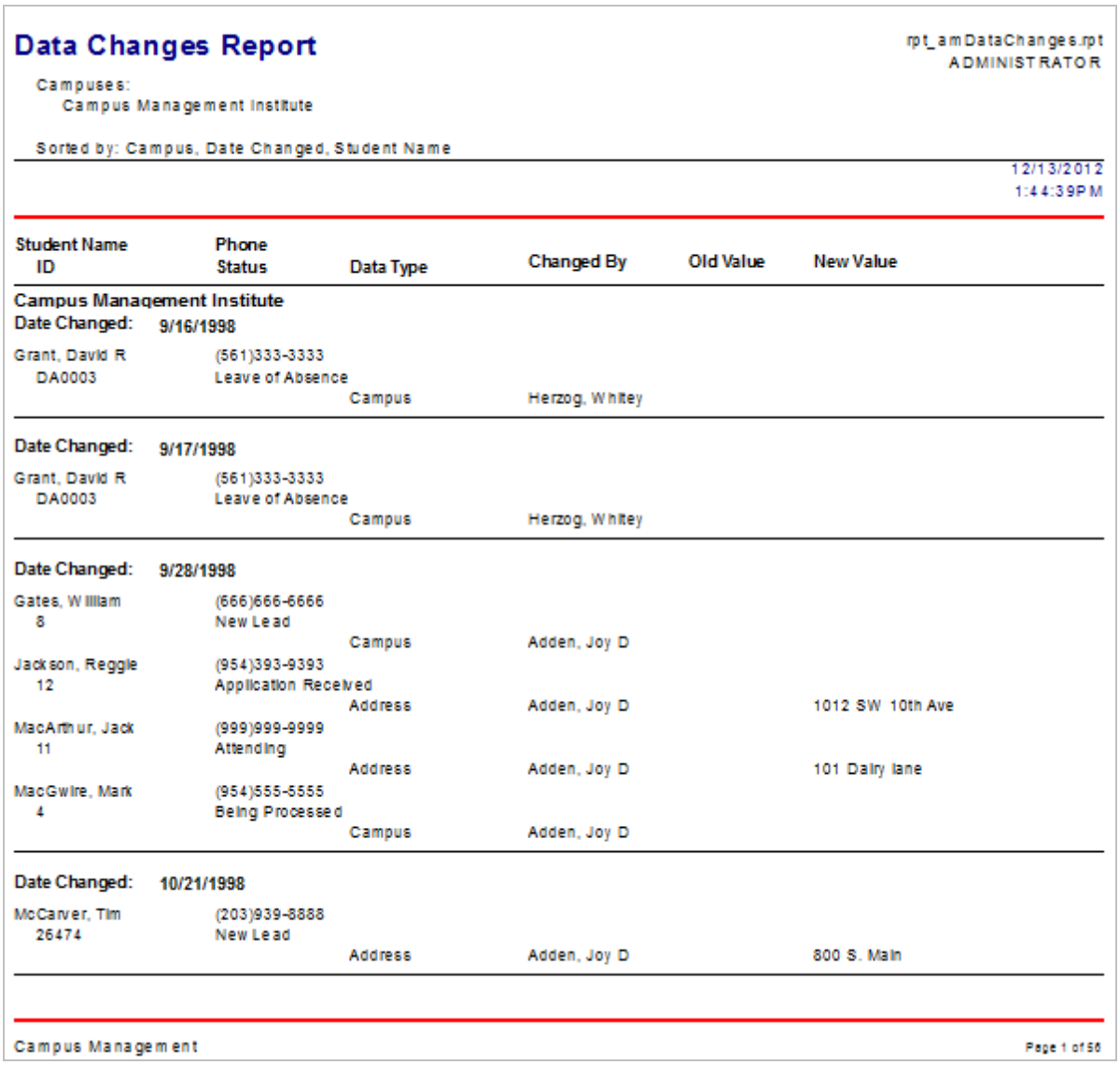
   You can select a change date range and one or more of the tracked data items for inclusion on the report. The sort order is fixed.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.



Data Changes Report

rpt_amDataChanges.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute

Sorted by: Campus, Date Changed, Student Name

12/13/2012
1:44:39PM

Student Name / ID	Phone / Status	Data Type	Changed By	Old Value	New Value
Campus Management Institute					
Date Changed: **9/16/1998**					
Grant, David R DA0003	(561)333-3333 Leave of Absence	Campus	Herzog, Whitey		
Date Changed: **9/17/1998**					
Grant, David R DA0003	(561)333-3333 Leave of Absence	Campus	Herzog, Whitey		
Date Changed: **9/28/1998**					
Gates, William 8	(666)666-6666 New Lead	Campus	Adden, Joy D		
Jackson, Reggie 12	(954)393-9393 Application Received	Address	Adden, Joy D		1012 SW 10th Ave
MacArthur, Jack 11	(999)999-9999 Attending	Address	Adden, Joy D		101 Dairy lane
MacGwire, Mark 4	(954)555-5555 Being Processed	Campus	Adden, Joy D		
Date Changed: **10/21/1998**					
McCarver, Tim 26474	(203)939-8888 New Lead	Address	Adden, Joy D		800 S. Main

Campus Management

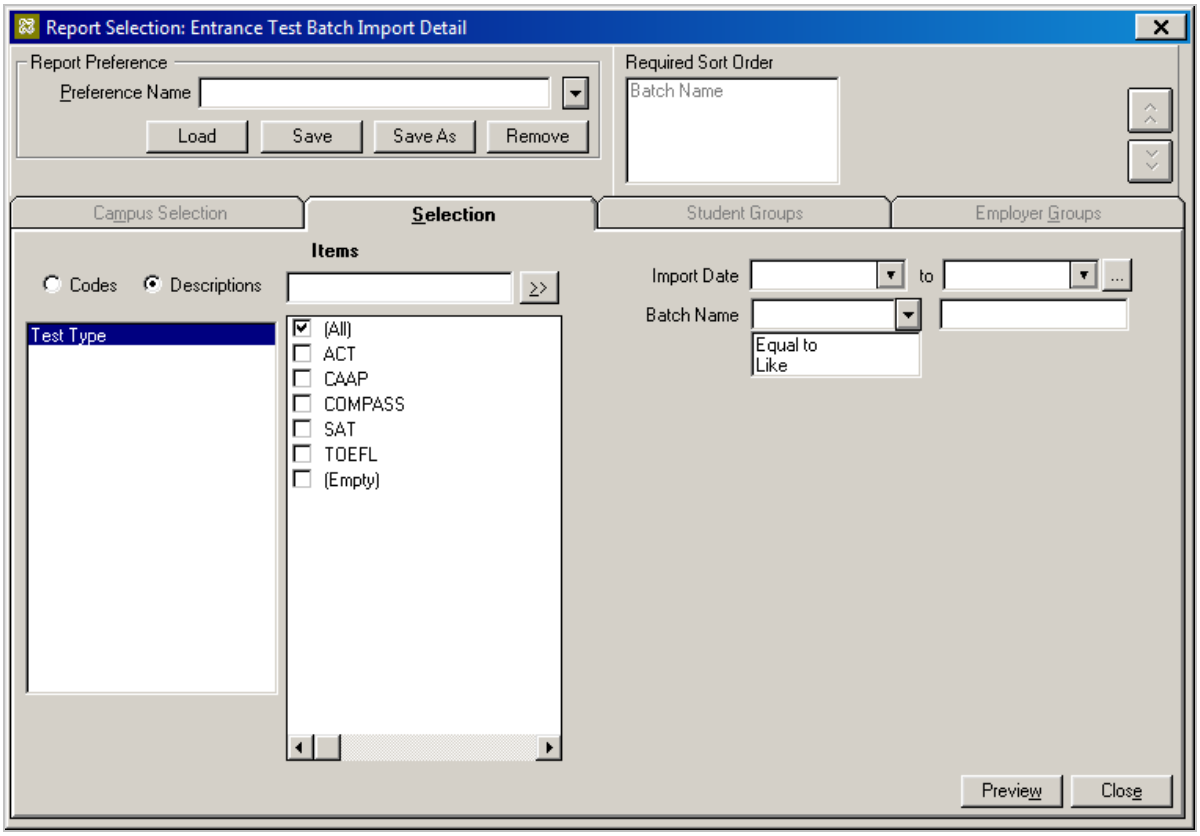
Page 1 of 56

Entrance Test Batch Import Detail

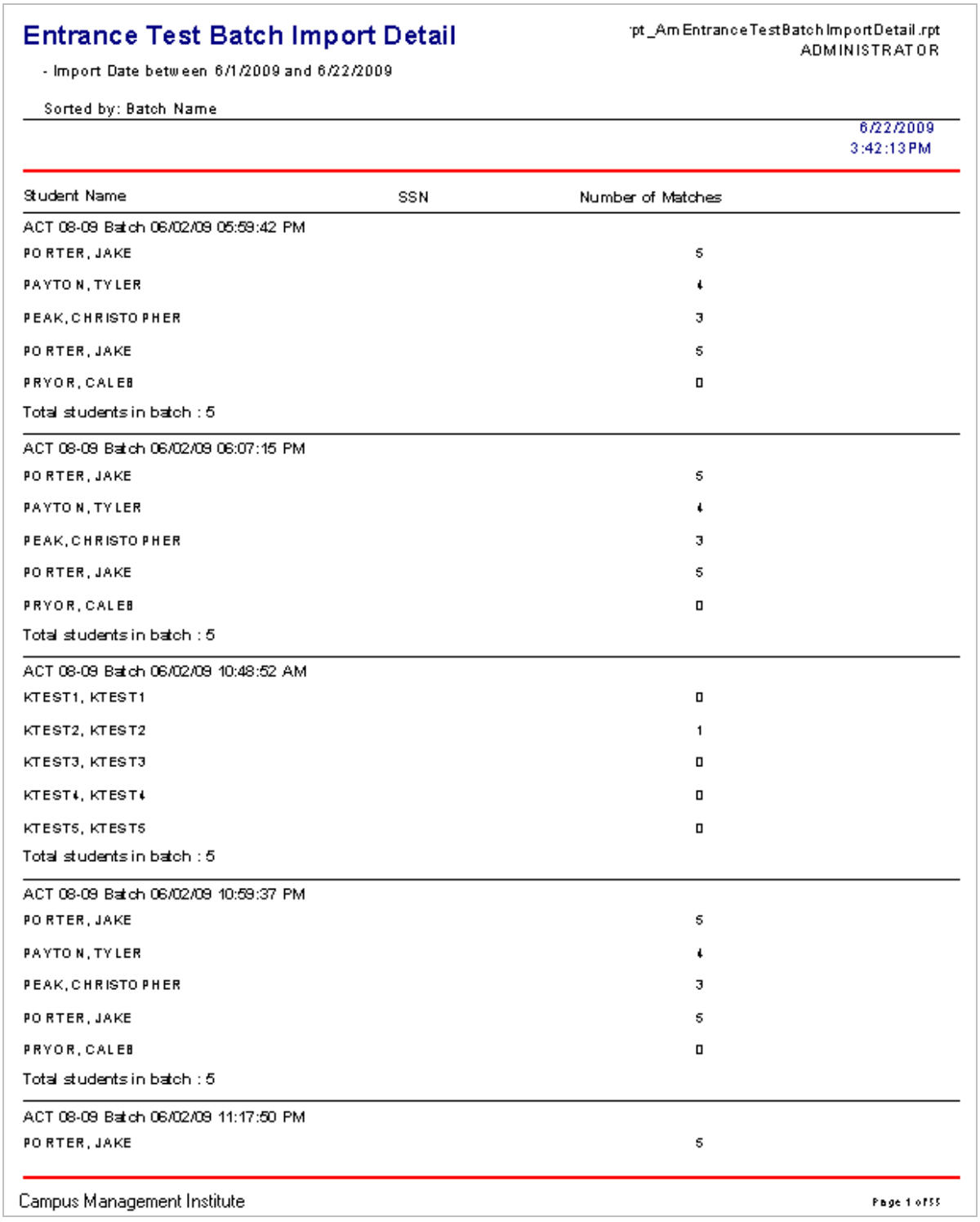
This report provides a view of the completion of imported test files.

To run the report:

1. Navigate to **Reports > Admissions > Entrance Test Batch Import Detail**. The Report Selection: Entrance Test Batch Import Detail form is displayed.
2. Select appropriate options on the Selection tab.



3. Click **Preview**. The report is assembled and displayed in the Report Viewer.



Entrance Test Batch Import Detail

rpt_AmEntranceTestBatchImportDetail.rpt
ADMINISTRATOR

- Import Date between 6/1/2009 and 6/22/2009

Sorted by: Batch Name

6/22/2009
3:42:13 PM

Student Name	SSN	Number of Matches
ACT 08-09 Batch 06/02/09 05:59:42 PM		
PORTER, JAKE		5
PAYTON, TYLER		4
PEAK, CHRISTOPHER		3
PORTER, JAKE		5
PRYOR, CALEB		0
Total students in batch : 5		
ACT 08-09 Batch 06/02/09 06:07:15 PM		
PORTER, JAKE		5
PAYTON, TYLER		4
PEAK, CHRISTOPHER		3
PORTER, JAKE		5
PRYOR, CALEB		0
Total students in batch : 5		
ACT 08-09 Batch 06/02/09 10:48:52 AM		
KTEST1, KTEST1		0
KTEST2, KTEST2		1
KTEST3, KTEST3		0
KTEST4, KTEST4		0
KTEST5, KTEST5		0
Total students in batch : 5		
ACT 08-09 Batch 06/02/09 10:59:37 PM		
PORTER, JAKE		5
PAYTON, TYLER		4
PEAK, CHRISTOPHER		3
PORTER, JAKE		5
PRYOR, CALEB		0
Total students in batch : 5		
ACT 08-09 Batch 06/02/09 11:17:50 PM		
PORTER, JAKE		5

Campus Management Institute

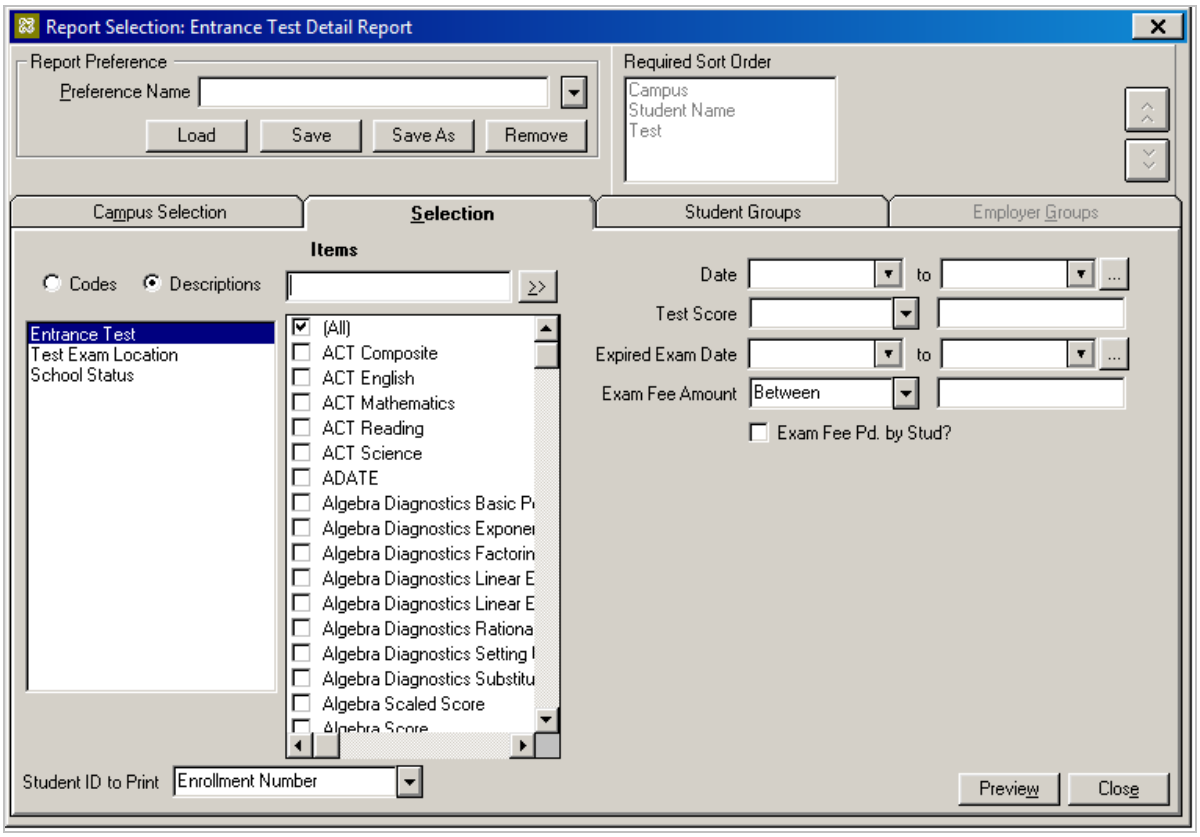
Page 1 of 55

Entrance Test Detail Report

This report lists lead and student entrance test scores. The report displays all tests (main and sub-fields) and information entered on the Admissions Tests form.

To run the report:

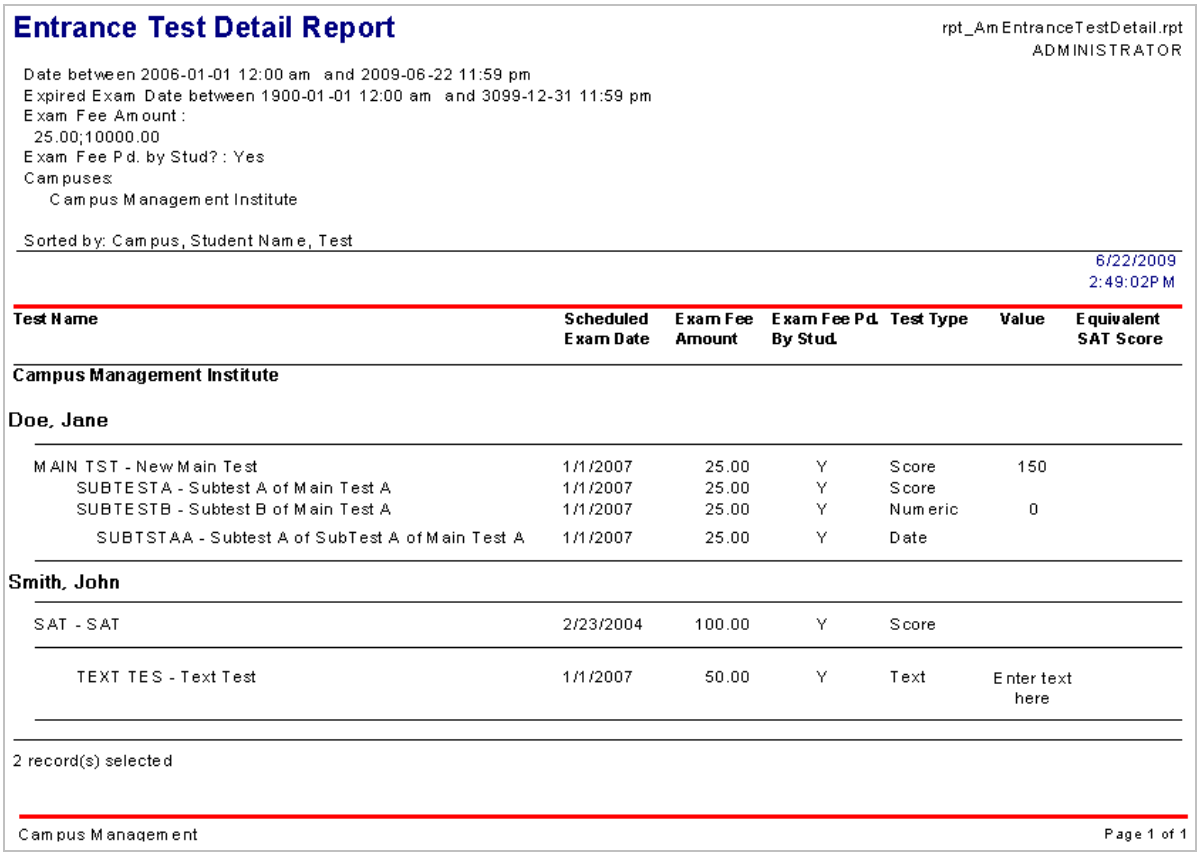
1. Navigate to **Reports > Admissions > Entrance Test Detail Report**. The Report Selection: Entrance Test Detail Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.



Entrance Test Detail Report

rpt_AmEntranceTestDetail.rpt
ADMINISTRATOR

Date between 2006-01-01 12:00 am and 2009-06-22 11:59 pm
Expired Exam Date between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Exam Fee Amount :
25.00;10000.00
Exam Fee Pd. by Stud? : Yes
Campuses:
Campus Management Institute

Sorted by: Campus, Student Name, Test

6/22/2009
2:49:02PM

Test Name	Scheduled Exam Date	Exam Fee Amount	Exam Fee Pd. By Stud.	Test Type	Value	Equivalent SAT Score
Campus Management Institute						
Doe, Jane						
MAIN TST - New Main Test	1/1/2007	25.00	Y	Score	150	
SUBTESTA - Subtest A of Main Test A	1/1/2007	25.00	Y	Score		
SUBTESTB - Subtest B of Main Test A	1/1/2007	25.00	Y	Numeric	0	
SUBTSTAA - Subtest A of SubTest A of Main Test A	1/1/2007	25.00	Y	Date		
Smith, John						
SAT - SAT	2/23/2004	100.00	Y	Score		
TEXT TES - Text Test	1/1/2007	50.00	Y	Text	Enter text here	

2 record(s) selected

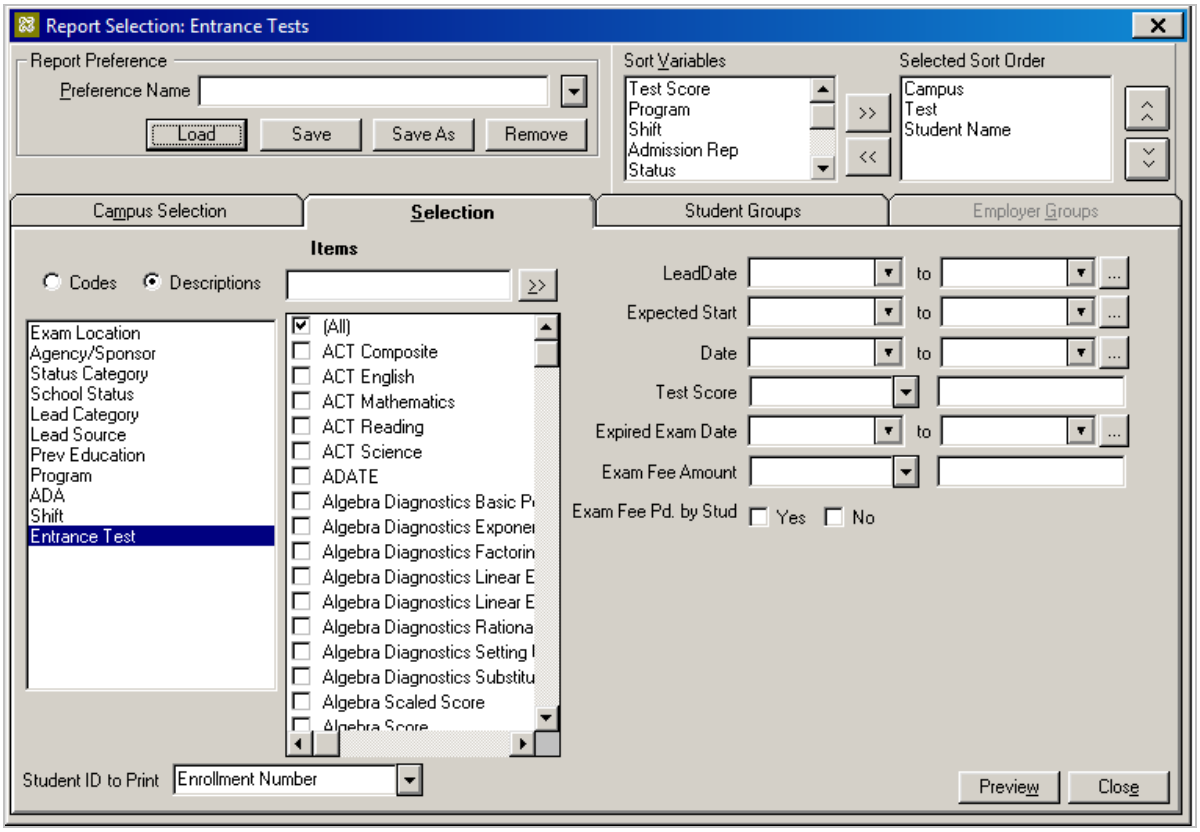
Campus Management
Page 1 of 1

Entrance Tests

This report lists lead and student entrance test scores.

To run the report:

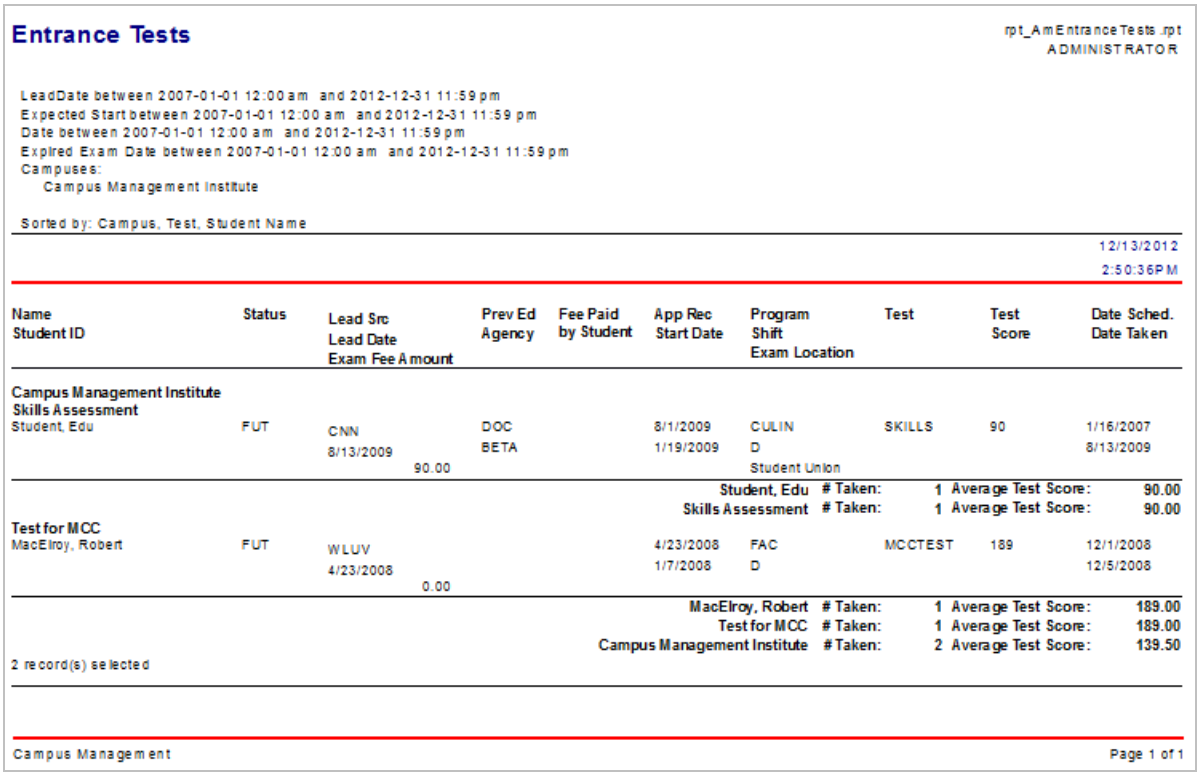
1. Navigate to **Reports > Admissions > Entrance Tests**. The Report Selection: Entrance Tests form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.



Entrance Tests

rpt_AmEntranceTests.rpt
ADMINISTRATOR

LeadDate between 2007-01-01 12:00 am and 2012-12-31 11:59 pm
Expected Start between 2007-01-01 12:00 am and 2012-12-31 11:59 pm
Date between 2007-01-01 12:00 am and 2012-12-31 11:59 pm
Expired Exam Date between 2007-01-01 12:00 am and 2012-12-31 11:59 pm
Campuses:
Campus Management Institute

Sorted by: Campus, Test, Student Name

12/13/2012
2:50:36PM

Name / Student ID	Status	Lead Src / Lead Date / Exam Fee Amount	Prev Ed Agency	Fee Paid by Student	App Rec Start Date	Program / Shift / Exam Location	Test	Test Score	Date Sched. / Date Taken
Campus Management Institute									
Skills Assessment									
Student, Edu	FUT	CNN	DOC		8/1/2009	CULIN	SKILLS	90	1/16/2007
		8/13/2009	BETA		1/19/2009	D			8/13/2009
		90.00				Student Union			
						Student, Edu # Taken:	**1**	**Average Test Score:**	**90.00**
						Skills Assessment # Taken:	**1**	**Average Test Score:**	**90.00**
Test for MCC									
MacElroy, Robert	FUT	WLUV			4/23/2008	FAC	MCCTEST	189	12/1/2008
		4/23/2008			1/7/2008	D			12/5/2008
		0.00							
						MacElroy, Robert # Taken:	**1**	**Average Test Score:**	**189.00**
						Test for MCC # Taken:	**1**	**Average Test Score:**	**189.00**
						Campus Management Institute # Taken:	**2**	**Average Test Score:**	**139.50**

2 record(s) selected

Campus Management

Page 1 of 1

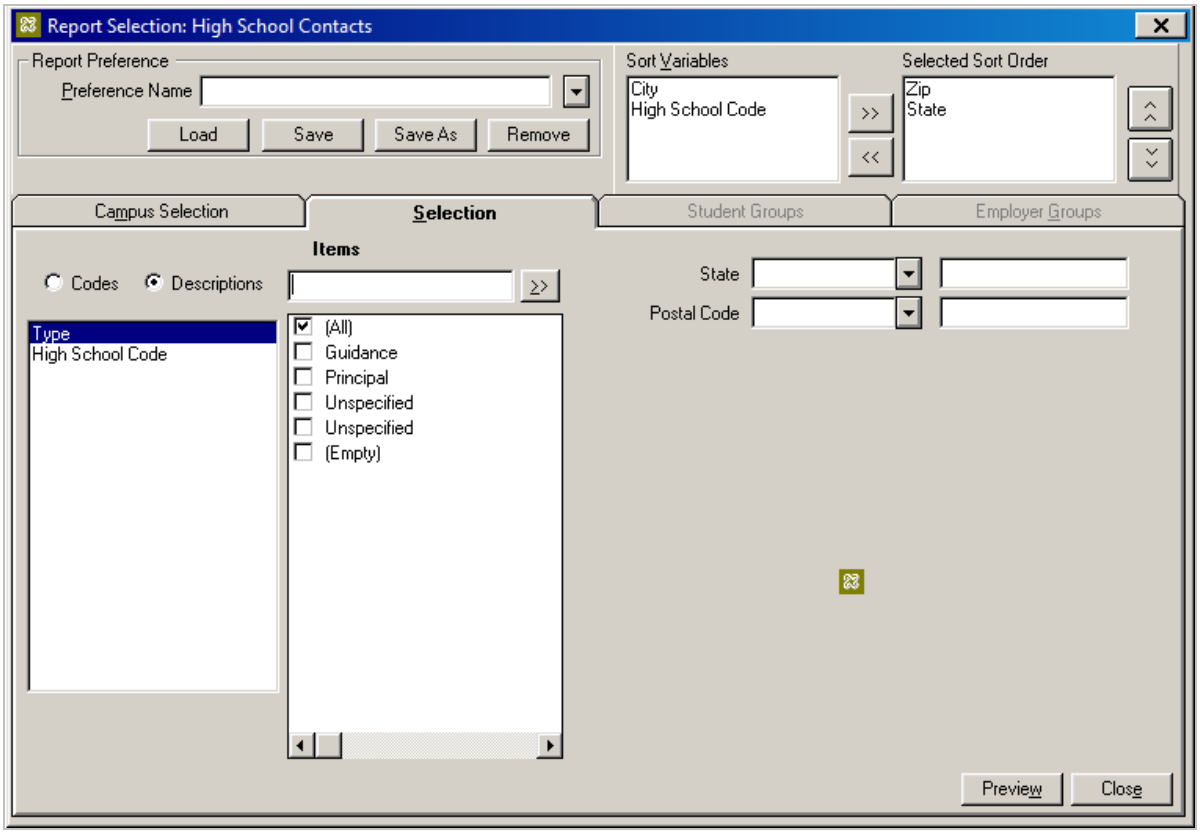
High School Contacts

This report is used to print high school contact labels.

Note: If this report is run from the Reports menu, labels for many schools can be produced. If the report is printed from the High School Code Setup form, only labels for that school can be printed.

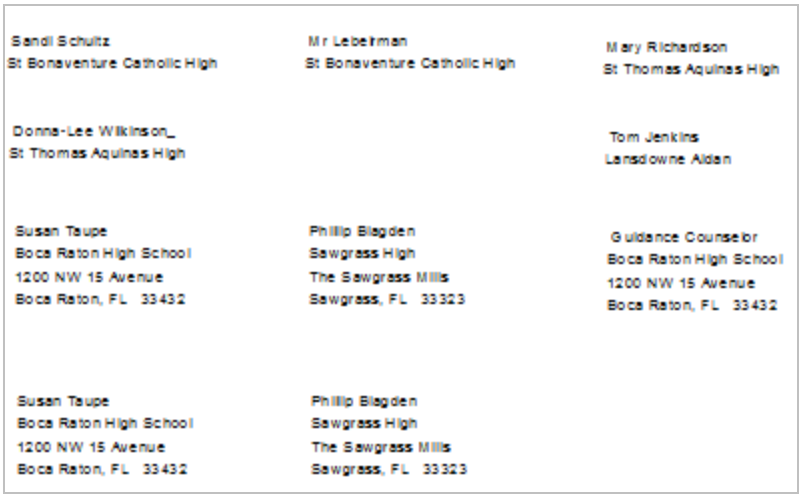
To run the report:

1. Navigate to **Reports > Admissions > High School Contacts**. The Report Selection: High School Contacts form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

The following is a report example:



Sandi Schultz
St Bonaventure Catholic High

Mr Lebelman
St Bonaventure Catholic High

Mary Richardson
St Thomas Aquinas High

Donna-Lee Wilkinson_
St Thomas Aquinas High

Tom Jenkins
Lansdowne Aldan

Susan Taupe
Boca Raton High School
1200 NW 15 Avenue
Boca Raton, FL 33432

Phillip Blagden
Sawgrass High
The Sawgrass Mills
Sawgrass, FL 33323

Guidance Counselor
Boca Raton High School
1200 NW 15 Avenue
Boca Raton, FL 33432

Susan Taupe
Boca Raton High School
1200 NW 15 Avenue
Boca Raton, FL 33432

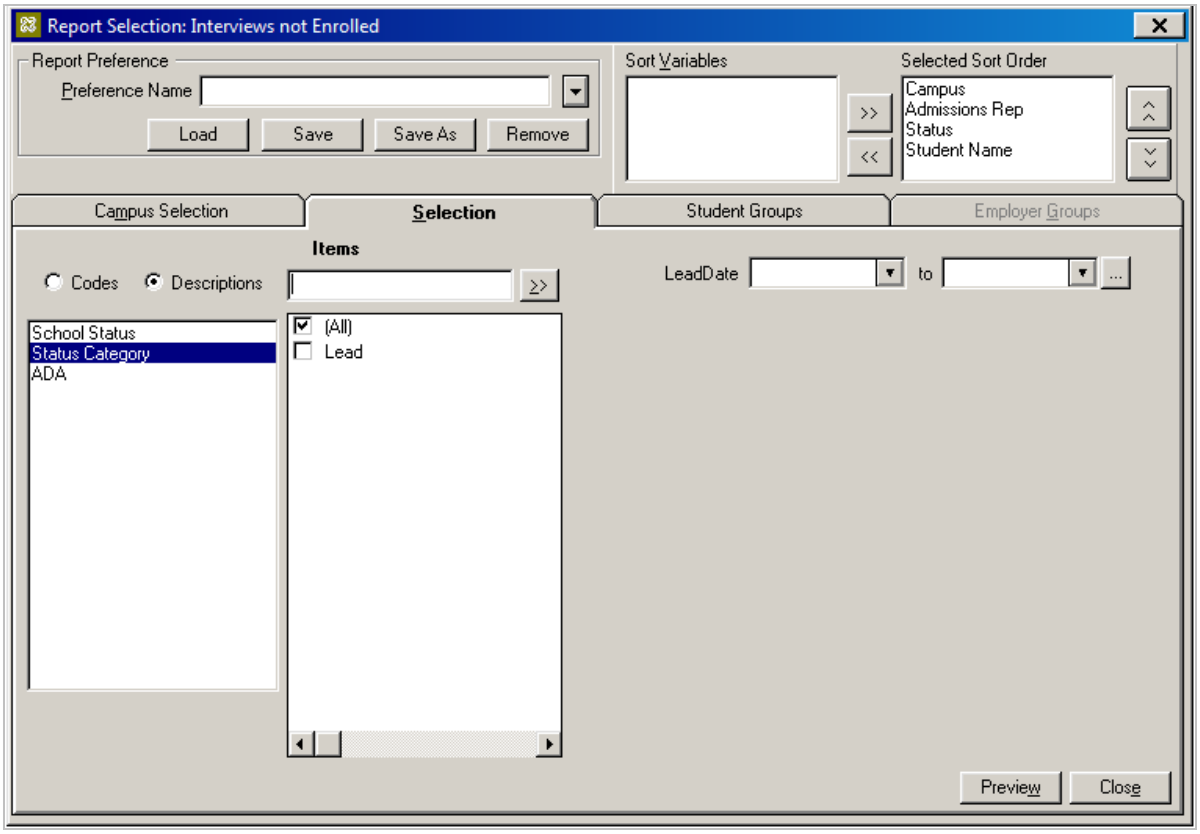
Phillip Blagden
Sawgrass High
The Sawgrass Mills
Sawgrass, FL 33323

Interviews not Enrolled

This report lists leads that have been interviewed but not enrolled.

To run the report:

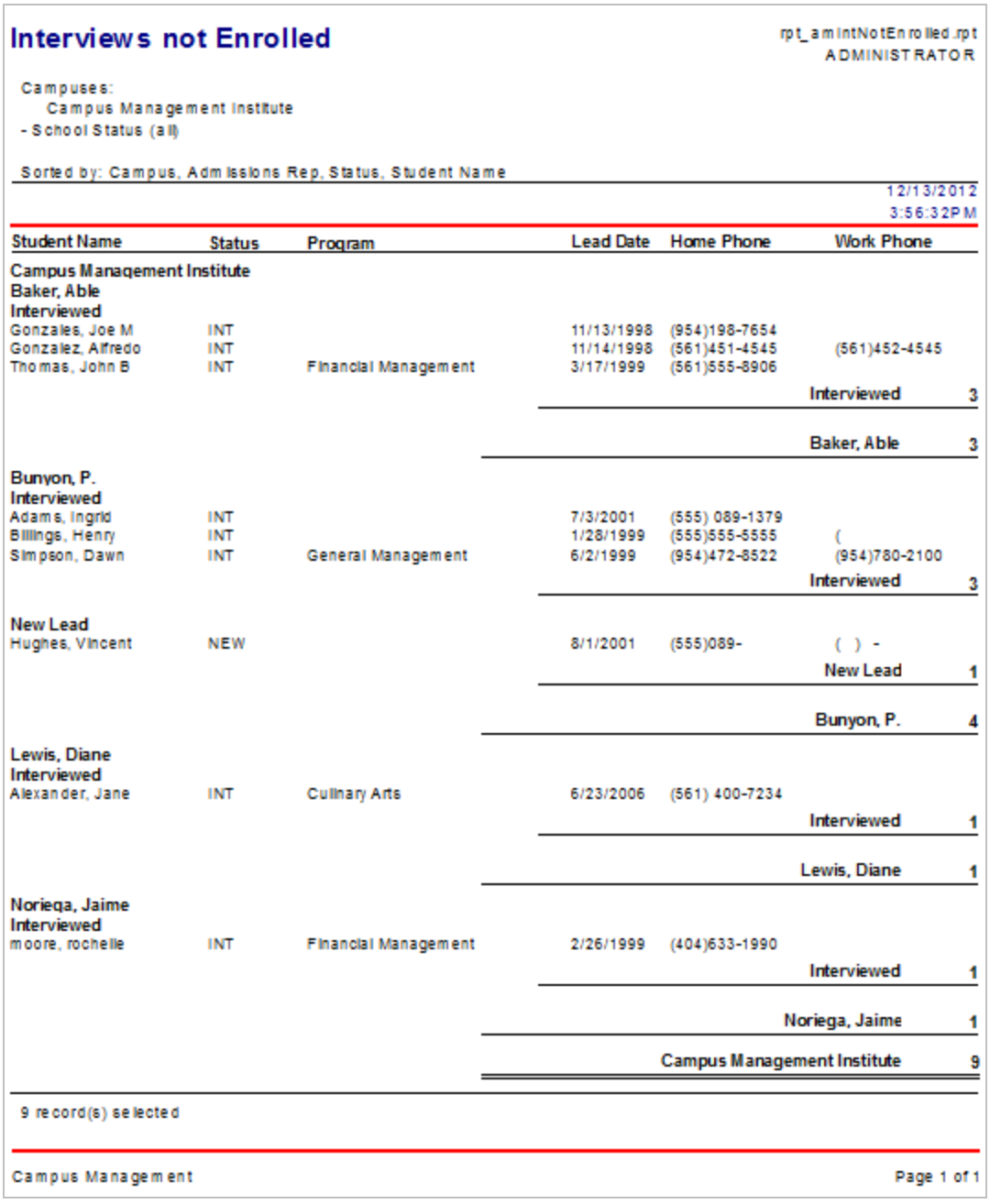
1. Navigate to **Reports > Admissions > Interviews not Enrolled**. The Report Selection: Interviews not Enrolled form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

The report is grouped by Admissions Rep.



Interviews not Enrolled

rpt_amIntNotEnrolled.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- School Status (all)

Sorted by: Campus, Admissions Rep, Status, Student Name

12/13/2012
3:56:32PM

Student Name	Status	Program	Lead Date	Home Phone	Work Phone	
Campus Management Institute						
Baker, Able						
Interviewed						
Gonzales, Joe M	INT		11/13/1998	(954)198-7654		
Gonzalez, Alfredo	INT		11/14/1998	(561)451-4545	(561)452-4545	
Thomas, John B	INT	Financial Management	3/17/1999	(561)555-8906		
					Interviewed	**3**
					Baker, Able	**3**
Bunyon, P.						
Interviewed						
Adams, Ingrid	INT		7/3/2001	(555) 089-1379		
Billings, Henry	INT		1/28/1999	(555)555-5555	(	
Simpson, Dawn	INT	General Management	6/2/1999	(954)472-8522	(954)780-2100	
					Interviewed	**3**
New Lead						
Hughes, Vincent	NEW		8/1/2001	(555)089-	( ) -	
					New Lead	**1**
					Bunyon, P.	**4**
Lewis, Diane						
Interviewed						
Alexander, Jane	INT	Culinary Arts	6/23/2006	(561) 400-7234		
					Interviewed	**1**
					Lewis, Diane	**1**
Noriega, Jaime						
Interviewed						
moore, rochelle	INT	Financial Management	2/26/1999	(404)633-1990		
					Interviewed	**1**
					Noriega, Jaime	**1**
					Campus Management Institute	**9**

9 record(s) selected

Campus Management

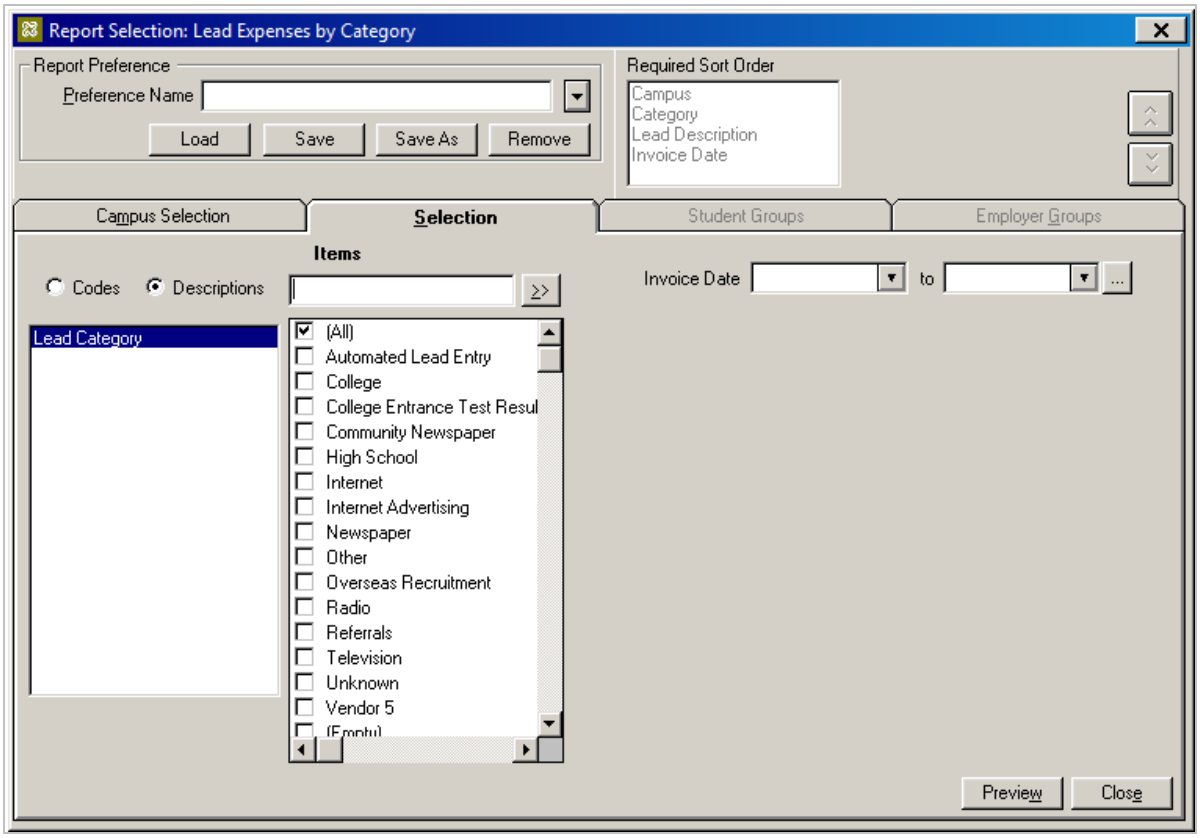
Page 1 of 1

Lead Expenses by Category

This report lists lead expenses by lead source within lead category.

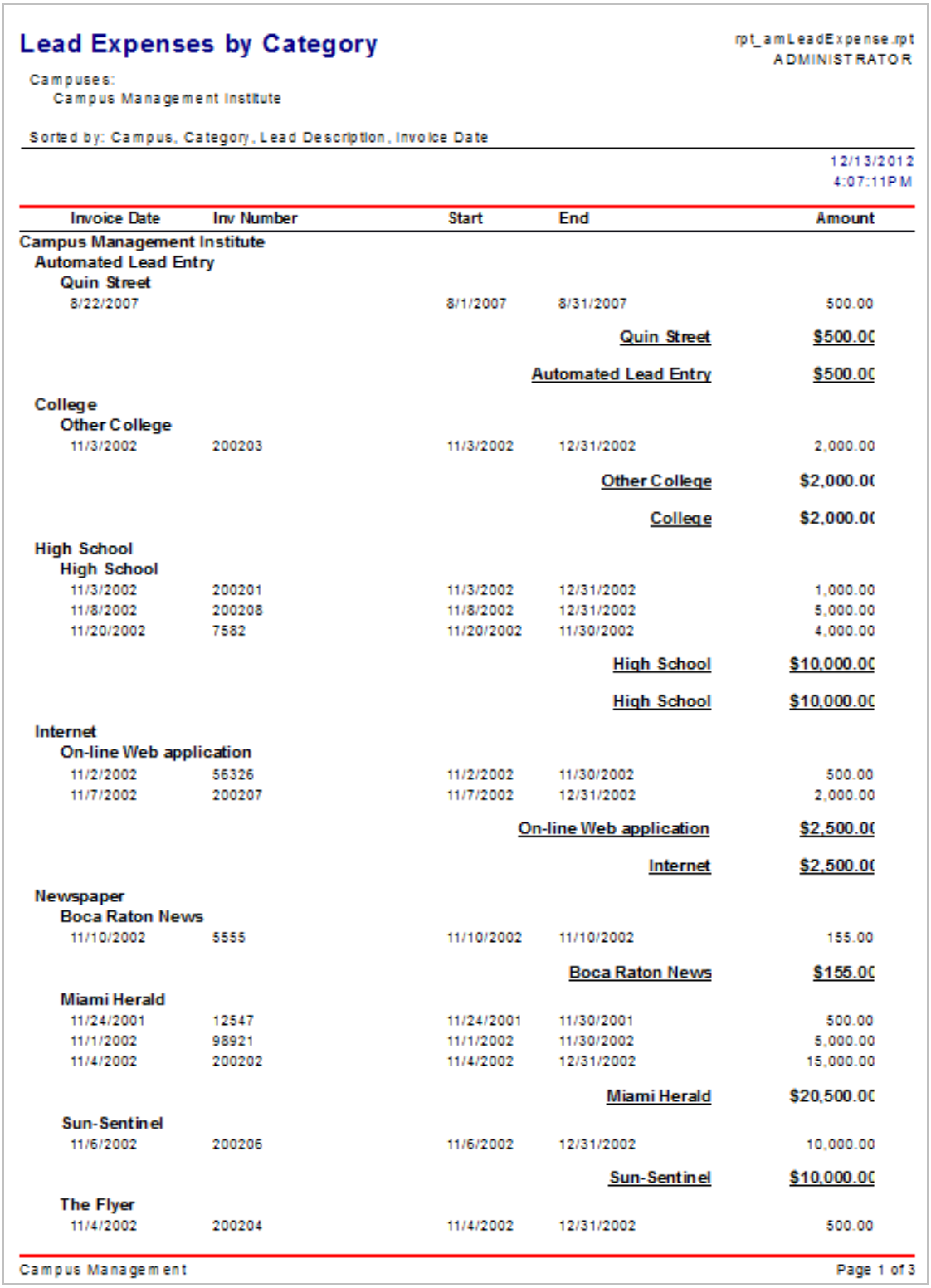
To run the report:

1. Navigate to **Reports > Admissions > Lead Expenses by Category**. The Report Selection: Lead Expenses by Category form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

Totals are provided at the lead category, lead description, and grand total levels.



Lead Expenses by Category

rpt_amLeadExpense.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute

Sorted by: Campus, Category, Lead Description, Invoice Date

12/13/2012
4:07:11PM

Invoice Date	Inv Number	Start	End	Amount
Campus Management Institute				
Automated Lead Entry				
Quin Street				
8/22/2007		8/1/2007	8/31/2007	500.00
			Quin Street	**$500.00**
			Automated Lead Entry	**$500.00**
College				
Other College				
11/3/2002	200203	11/3/2002	12/31/2002	2,000.00
			Other College	**$2,000.00**
			College	**$2,000.00**
High School				
High School				
11/3/2002	200201	11/3/2002	12/31/2002	1,000.00
11/8/2002	200208	11/8/2002	12/31/2002	5,000.00
11/20/2002	7582	11/20/2002	11/30/2002	4,000.00
			High School	**$10,000.00**
			High School	**$10,000.00**
Internet				
On-line Web application				
11/2/2002	56326	11/2/2002	11/30/2002	500.00
11/7/2002	200207	11/7/2002	12/31/2002	2,000.00
			On-line Web application	**$2,500.00**
			Internet	**$2,500.00**
Newspaper				
Boca Raton News				
11/10/2002	5555	11/10/2002	11/10/2002	155.00
			Boca Raton News	**$155.00**
Miami Herald				
11/24/2001	12547	11/24/2001	11/30/2001	500.00
11/1/2002	98921	11/1/2002	11/30/2002	5,000.00
11/4/2002	200202	11/4/2002	12/31/2002	15,000.00
			Miami Herald	**$20,500.00**
Sun-Sentinel				
11/6/2002	200206	11/6/2002	12/31/2002	10,000.00
			Sun-Sentinel	**$10,000.00**
The Flyer				
11/4/2002	200204	11/4/2002	12/31/2002	500.00

Campus Management — Page 1 of 3

Lead Master Listing Detail

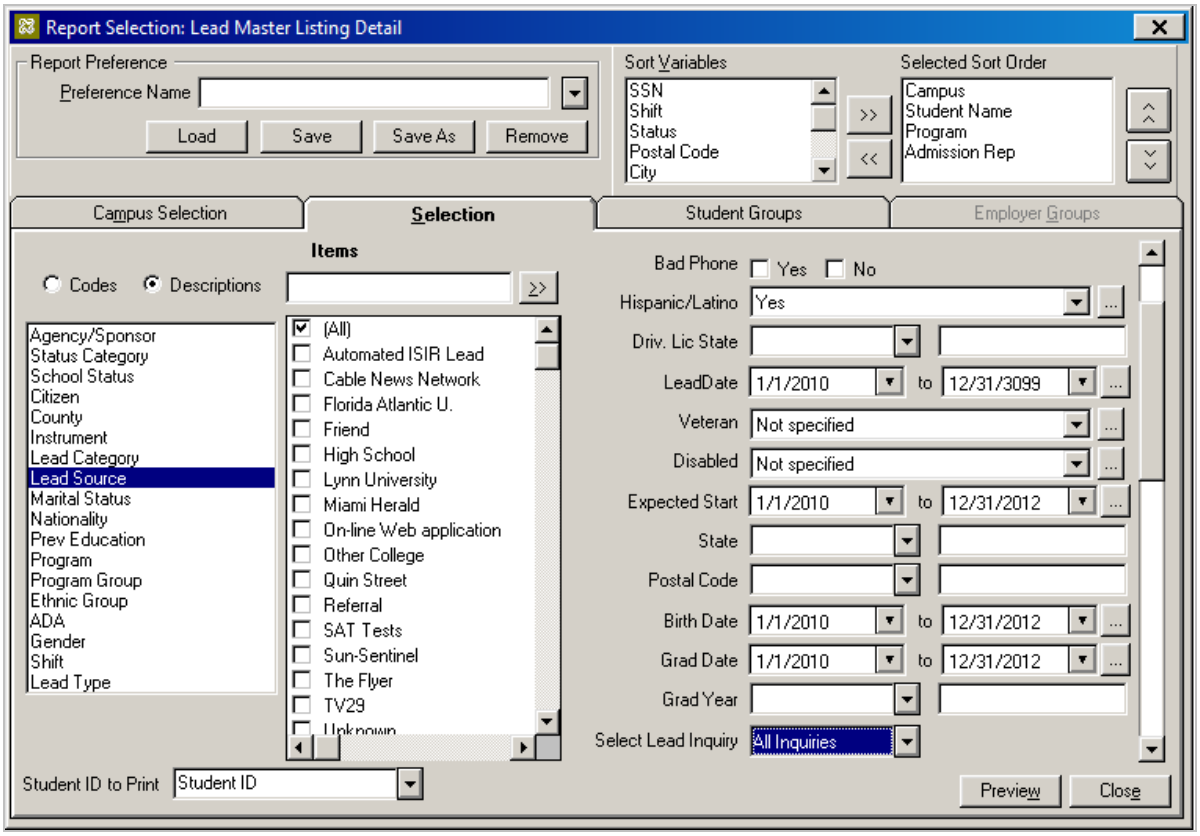
This report lists the leads converted by each Admissions Rep.

To run the report:

1. Navigate to **Reports > Admissions > Lead Master Listing Detail**. The Report Selection: Lead Master Listing Detail form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Notes:

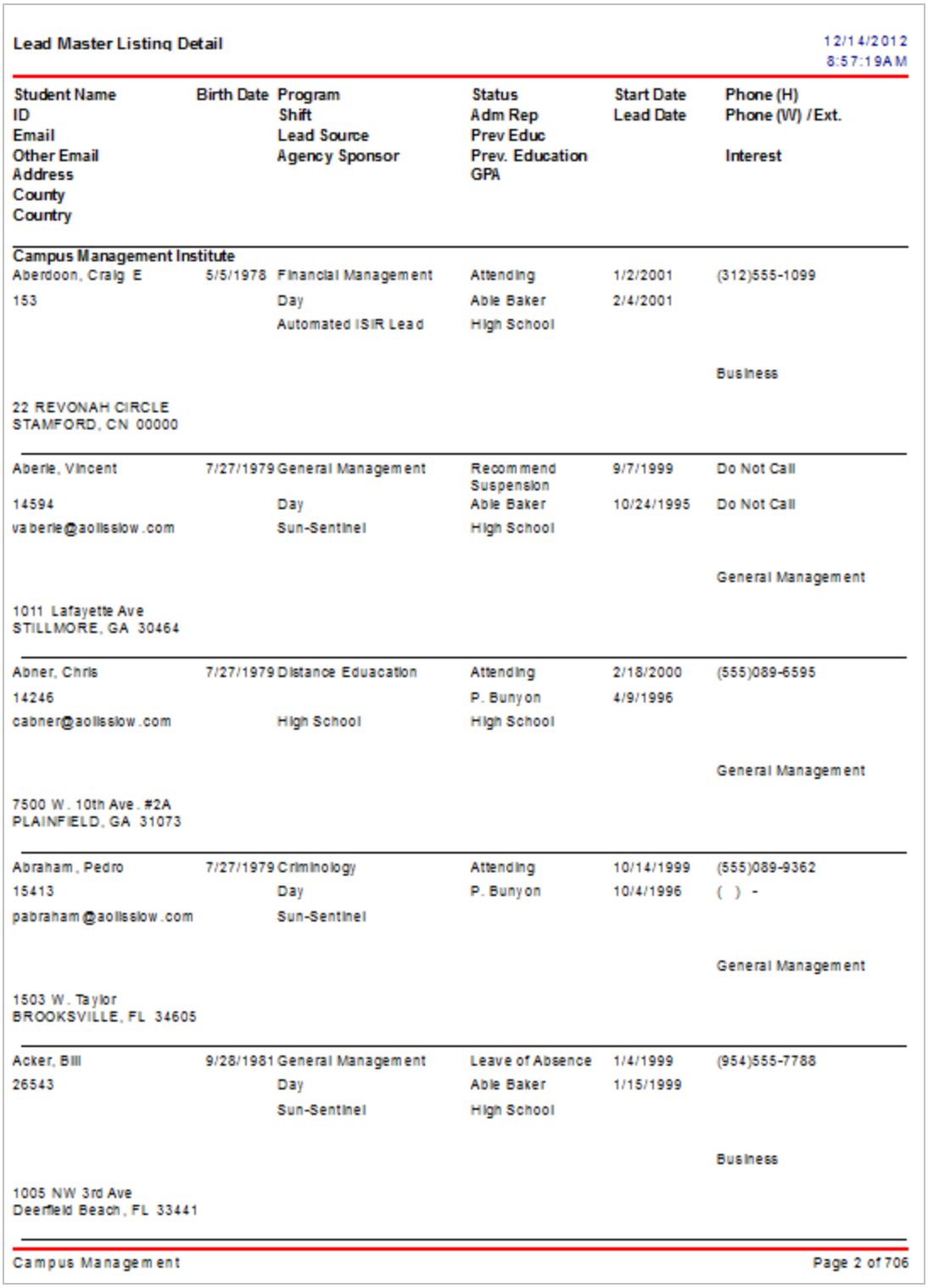
   - If Yes is selected in the Show Prev. Education field, the following previous High School education information is displayed on the report: High School Name, Grad Year, Grad Date, and Graduate.
   - The Select Lead Inquiry drop-down list field is displayed only if the Track Multiple Lead Inquiries option is enabled. See Campus Allow for setup instructions.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.



Lead Master Listing Detail 12/14/2012 8:57:19AM

Student Name / ID / Email / Other Email / Address / County / Country	Birth Date	Program / Shift / Lead Source / Agency Sponsor	Status / Adm Rep / Prev Educ / Prev. Education GPA	Start Date / Lead Date	Phone (H) / Phone (W) / Ext. / Interest
Campus Management Institute					
Aberdoon, Craig E 153 22 REVONAH CIRCLE STAMFORD, CN 00000	5/5/1978	Financial Management Day Automated ISIR Lead	Attending Able Baker High School	1/2/2001 2/4/2001	(312)555-1099 Business
Aberle, Vincent 14594 vaberle@aollsslow.com 1011 Lafayette Ave STILLMORE, GA 30464	7/27/1979	General Management Day Sun-Sentinel	Recommend Suspension Able Baker High School	9/7/1999 10/24/1995	Do Not Call Do Not Call General Management
Abner, Chris 14246 cabner@aollsslow.com 7500 W. 10th Ave. #2A PLAINFIELD, GA 31073	7/27/1979	Distance Eduacation High School	Attending P. Bunyon High School	2/18/2000 4/9/1996	(555)089-6595 General Management
Abraham, Pedro 15413 pabraham@aollsslow.com 1503 W. Taylor BROOKSVILLE, FL 34605	7/27/1979	Criminology Day Sun-Sentinel	Attending P. Bunyon	10/14/1999 10/4/1996	(555)089-9362 ( ) - General Management
Acker, Bill 26543 1005 NW 3rd Ave Deerfield Beach, FL 33441	9/28/1981	General Management Day Sun-Sentinel	Leave of Absence Able Baker High School	1/4/1999 1/15/1999	(954)555-7788 Business

Campus Management Page 2 of 706

Lead Master Listing Summary

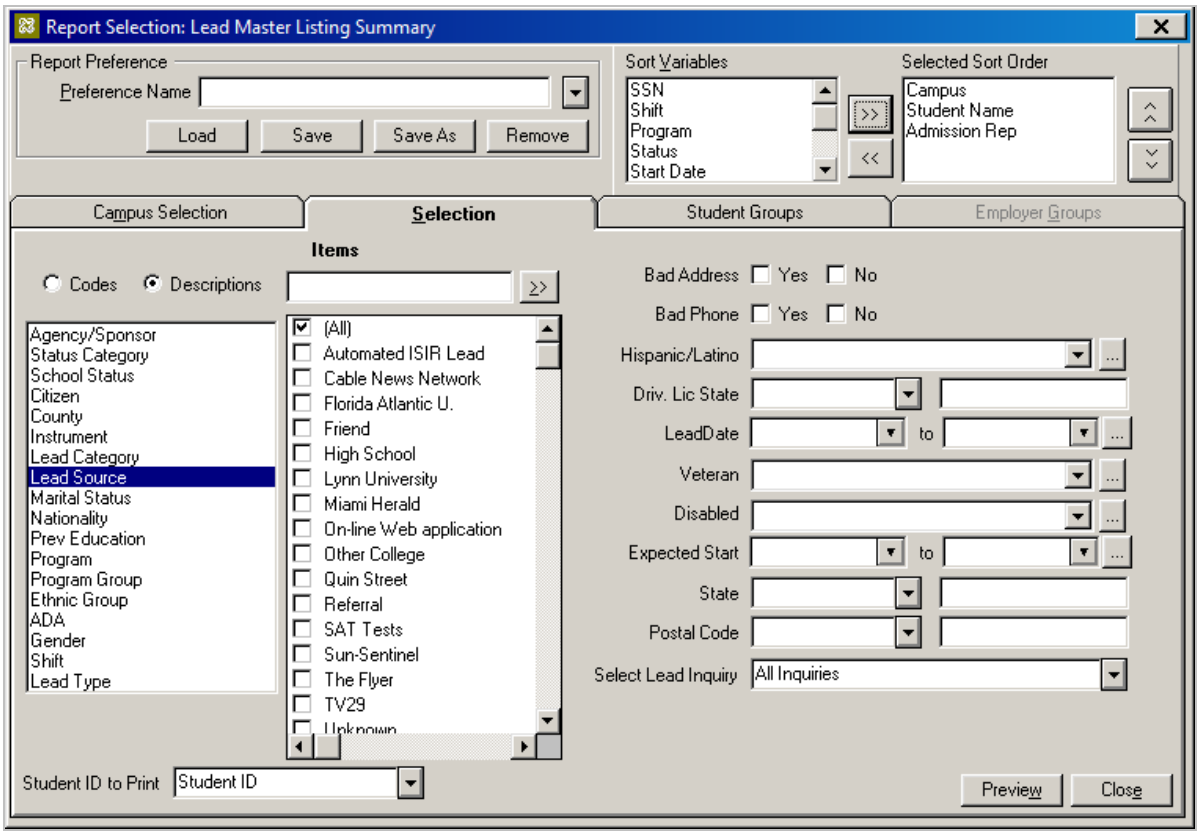
This report lists the leads converted by each Admissions Rep and provides summary information about leads. (Once leads are enrolled as students, they no longer appear on this report. For information about students, use the Master Student Listing in Academic Records.)

To run the report:

1. Navigate to **Reports > Admissions > Lead Master Listing Summary**. The Report Selection: Lead Master Listing Summary form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Notes:

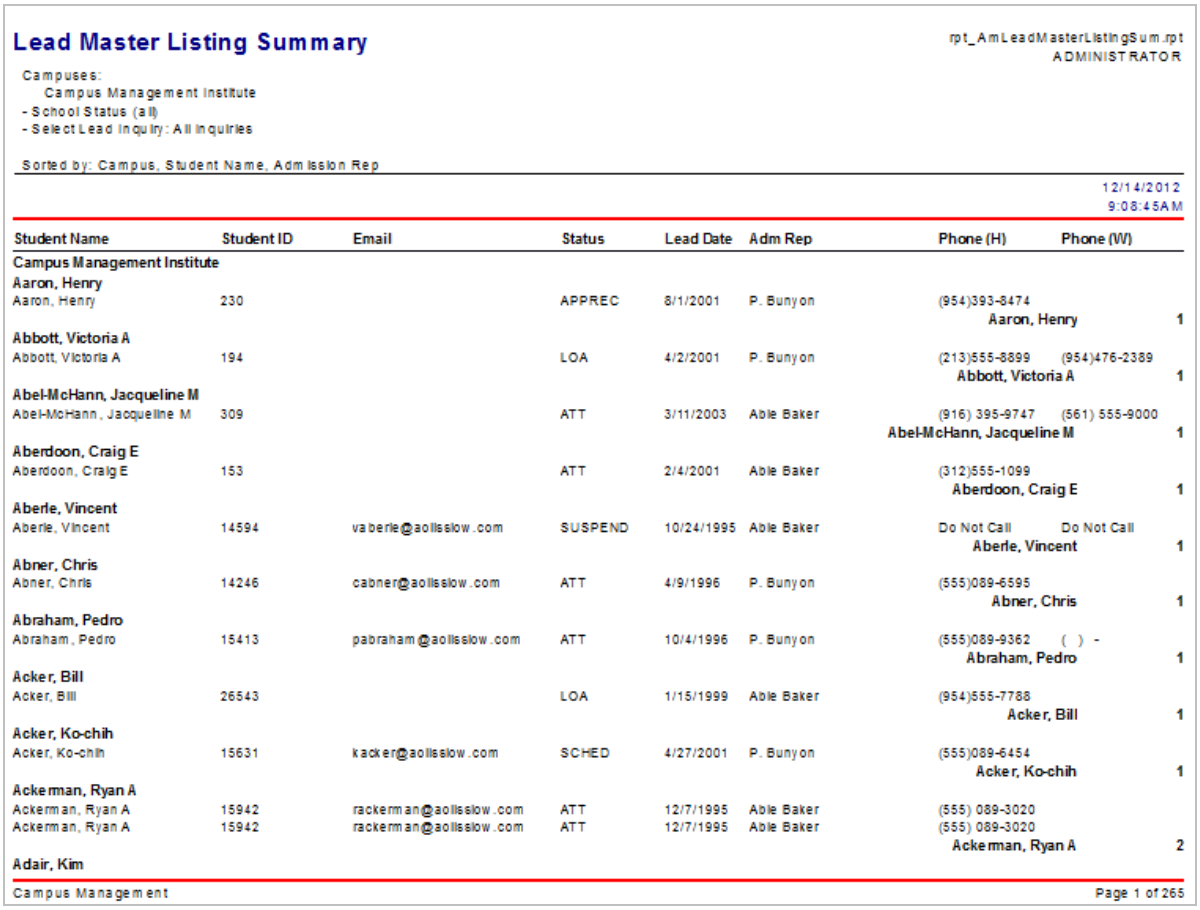
   - If you select Program Group as a selection criterion, you can filter the data by one or more active or inactive program groups. This selection enables you to filter the student population by the program group or groups to which their enrollments or leads are associated.
   - The Select Lead Inquiry drop-down list provides options to display and print multiple lead inquiries if the Track Multiple Lead Inquiries flag has been enabled. See Campus Allow for setup instructions.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.



Lead Master Listing Summary

rpt_AmLeadMasterListingSum.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- School Status (all)
- Select Lead Inquiry: All inquiries

Sorted by: Campus, Student Name, Admission Rep

12/14/2012
9:08:45AM

Student Name	Student ID	Email	Status	Lead Date	Adm Rep	Phone (H)	Phone (W)	
Campus Management Institute								
Aaron, Henry								
Aaron, Henry	230		APPREC	8/1/2001	P. Bunyon	(954)393-8474		
						Aaron, Henry		**1**
Abbott, Victoria A								
Abbott, Victoria A	194		LOA	4/2/2001	P. Bunyon	(213)555-8899	(954)476-2389	
						Abbott, Victoria A		**1**
Abel-McHann, Jacqueline M								
Abel-McHann, Jacqueline M	309		ATT	3/11/2003	Able Baker	(916) 395-9747	(561) 555-9000	
						Abel-McHann, Jacqueline M		**1**
Aberdoon, Craig E								
Aberdoon, Craig E	153		ATT	2/4/2001	Able Baker	(312)555-1099		
						Aberdoon, Craig E		**1**
Aberle, Vincent								
Aberle, Vincent	14594	vaberle@aollsslow.com	SUSPEND	10/24/1995	Able Baker	Do Not Call	Do Not Call	
						Aberle, Vincent		**1**
Abner, Chris								
Abner, Chris	14246	cabner@aollsslow.com	ATT	4/9/1996	P. Bunyon	(555)089-6595		
						Abner, Chris		**1**
Abraham, Pedro								
Abraham, Pedro	15413	pabraham@aollsslow.com	ATT	10/4/1996	P. Bunyon	(555)089-9362	( ) -	
						Abraham, Pedro		**1**
Acker, Bill								
Acker, Bill	26543		LOA	1/15/1999	Able Baker	(954)555-7788		
						Acker, Bill		**1**
Acker, Ko-chih								
Acker, Ko-chih	15631	kacker@aollsslow.com	SCHED	4/27/2001	P. Bunyon	(555)089-6454		
						Acker, Ko-chih		**1**
Ackerman, Ryan A								
Ackerman, Ryan A	15942	rackerman@aollsslow.com	ATT	12/7/1995	Able Baker	(555) 089-3020		
Ackerman, Ryan A	15942	rackerman@aollsslow.com	ATT	12/7/1995	Able Baker	(555) 089-3020		
						Ackerman, Ryan A		**2**
Adair, Kim								

Campus Management — Page 1 of 265

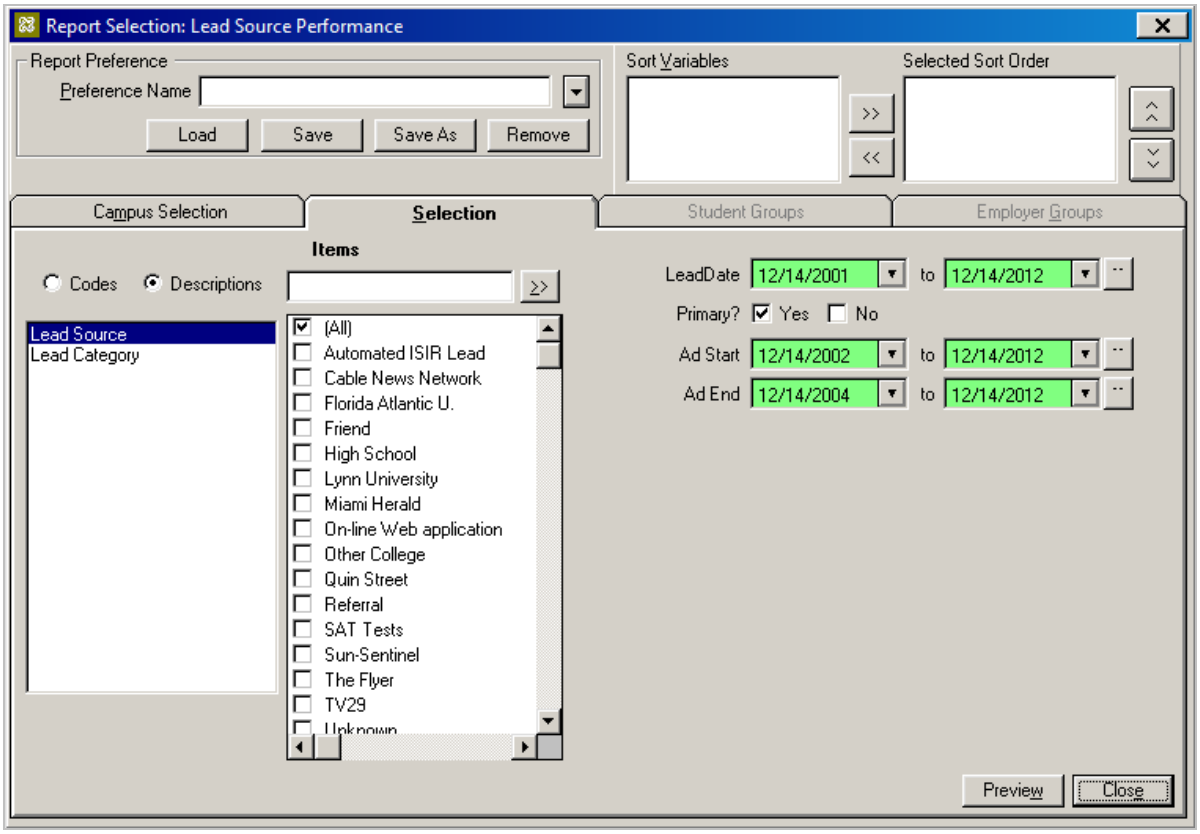
Lead Source Performance

This report is a summary of lead generation and resulting enrollment activities. This report provides a cost analysis for each lead source showing the effectiveness of each source of advertising.

The logic of counting the numbers of interviews given, enrollments, and actual starts follows a cohort basis. These numbers are counted from the pool of records being counted as leads received within the entered date range. The logic for interpreting the numeric columns is: *Of the X number of leads received for this fund source, how many were scheduled for interviews, enrolled, etc.*

To run the report:

1. Navigate to **Reports > Admissions > Lead Source Performance**. The Report Selection: Lead Source Performance form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



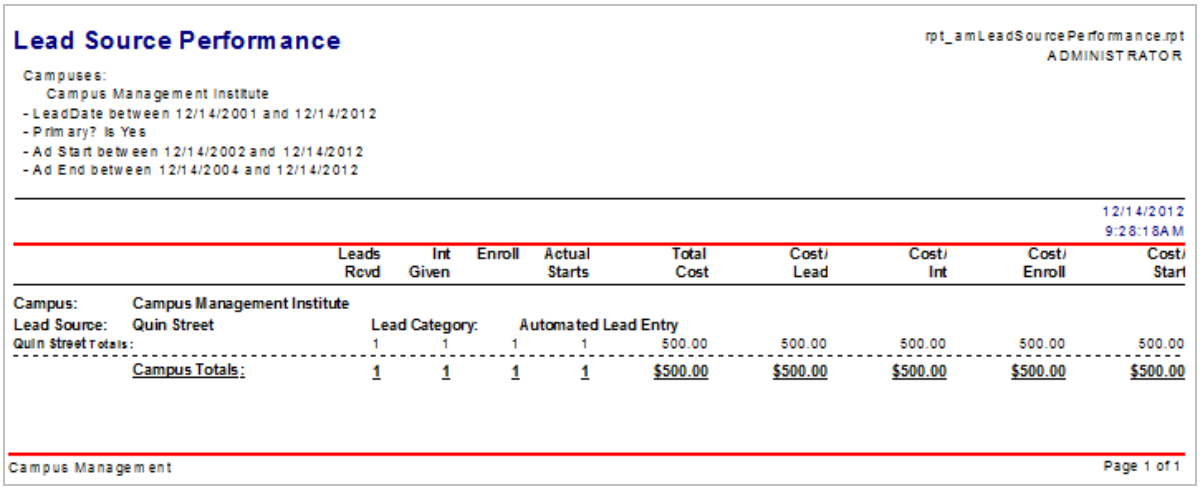
4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Lead Source
   - Lead Category
   - Leads Received
   - Interviews Given

- Enrollments
- Actual Starts
- Total Cost
- Cost Per Lead
- Cost Per Interview
- Cost Per Enrollment
- Cost Per Start

Group and grand totals are included for all columns.



Lead Source Performance

rpt_amLeadSourcePerformance.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- LeadDate between 12/14/2001 and 12/14/2012
- Primary? Is Yes
- Ad Start between 12/14/2002 and 12/14/2012
- Ad End between 12/14/2004 and 12/14/2012

12/14/2012
9:28:18AM

		Leads Rcvd	Int Given	Enroll	Actual Starts	Total Cost	Cost/ Lead	Cost/ Int	Cost/ Enroll	Cost/ Start
Campus:	Campus Management Institute									
Lead Source:	Quin Street	Lead Category:		Automated Lead Entry						
Quin Street Totals:		1	1	1	1	500.00	500.00	500.00	500.00	500.00
	Campus Totals:	1	1	1	1	$500.00	$500.00	$500.00	$500.00	$500.00

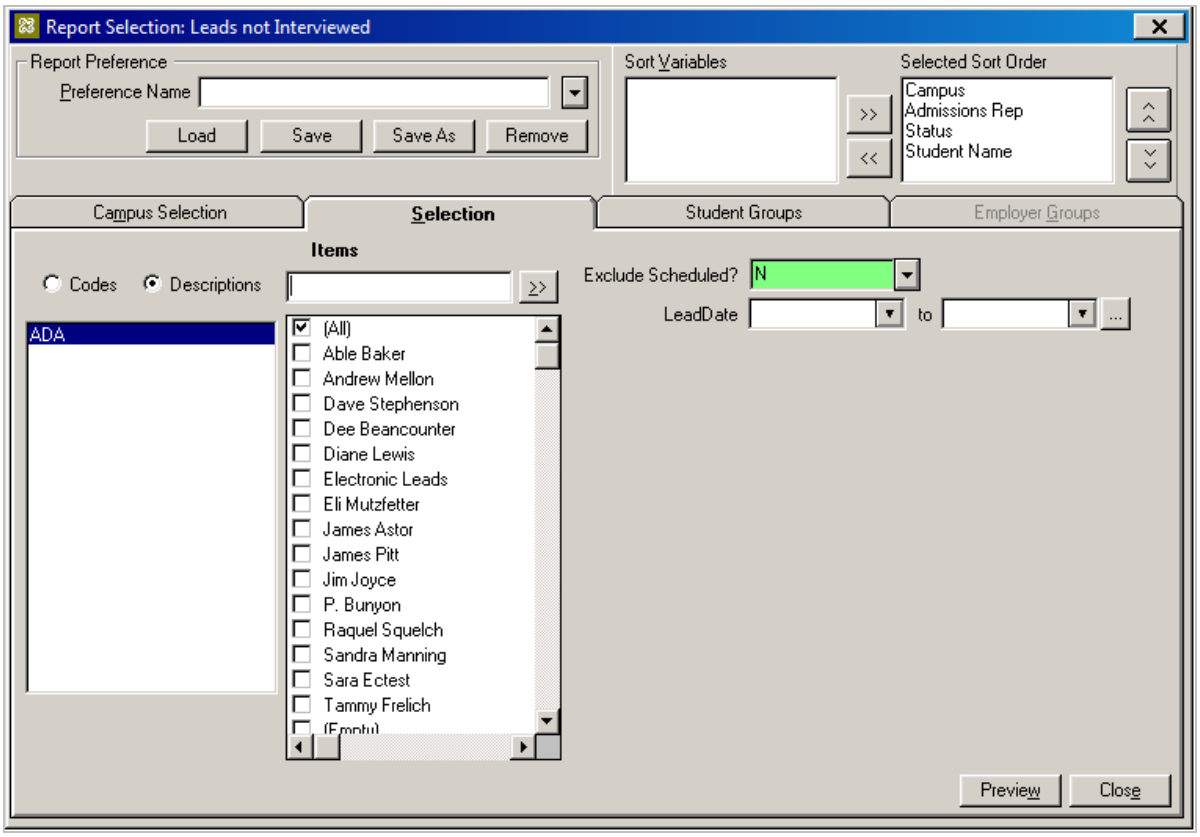
Campus Management
Page 1 of 1

Leads not Interviewed

This report lists leads that are not enrolled and have no interview record on file. An flag can be used to exclude scheduled interviews.

To run the report:

1. Navigate to **Reports > Admissions > Leads not Interviewed**. The Report Selection: Leads not Interviewed form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

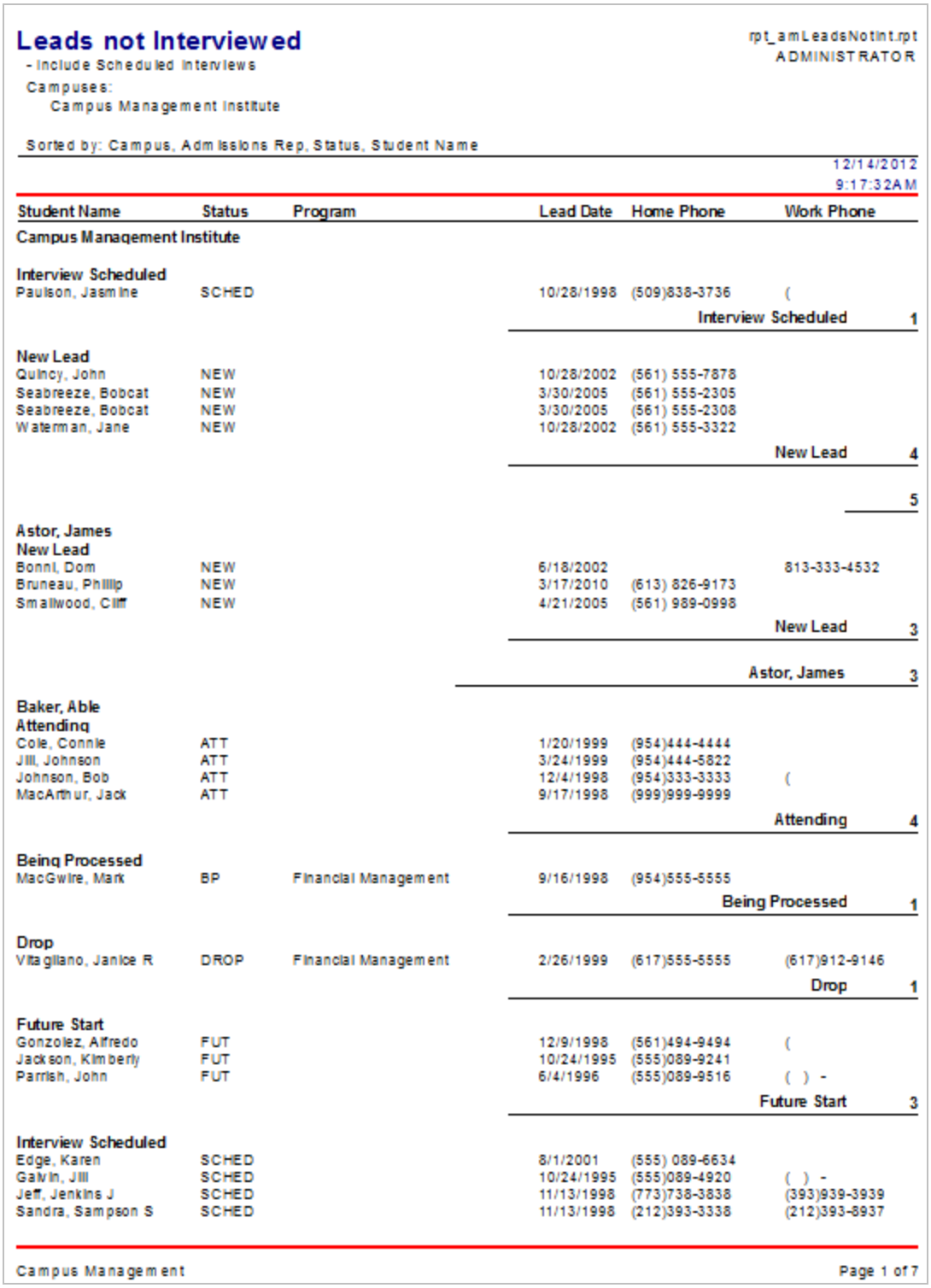


4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

The report is grouped by Admissions Rep.



Leads not Interviewed

rpt_amLeadsNotInt.rpt
ADMINISTRATOR

- Include Scheduled Interviews

Campuses:
Campus Management Institute

Sorted by: Campus, Admissions Rep, Status, Student Name

12/14/2012
9:17:32AM

Student Name	Status	Program	Lead Date	Home Phone	Work Phone	
Campus Management Institute						
Interview Scheduled						
Paulson, Jasmine	SCHED		10/28/1998	(509)838-3736	(	
					Interview Scheduled	**1**
New Lead						
Quincy, John	NEW		10/28/2002	(561) 555-7878		
Seabreeze, Bobcat	NEW		3/30/2005	(561) 555-2305		
Seabreeze, Bobcat	NEW		3/30/2005	(561) 555-2308		
Waterman, Jane	NEW		10/28/2002	(561) 555-3322		
					New Lead	**4**
						5
Astor, James						
New Lead						
Bonni, Dom	NEW		6/18/2002		813-333-4532	
Bruneau, Phillip	NEW		3/17/2010	(613) 826-9173		
Smallwood, Cliff	NEW		4/21/2005	(561) 989-0998		
					New Lead	**3**
					Astor, James	**3**
Baker, Able						
Attending						
Cole, Connie	ATT		1/20/1999	(954)444-4444		
Jill, Johnson	ATT		3/24/1999	(954)444-5822		
Johnson, Bob	ATT		12/4/1998	(954)333-3333	(	
MacArthur, Jack	ATT		9/17/1998	(999)999-9999		
					Attending	**4**
Being Processed						
MacGwire, Mark	BP	Financial Management	9/16/1998	(954)555-5555		
					Being Processed	**1**
Drop						
Vitagliano, Janice R	DROP	Financial Management	2/26/1999	(617)555-5555	(617)912-9146	
					Drop	**1**
Future Start						
Gonzolez, Alfredo	FUT		12/9/1998	(561)494-9494	(	
Jackson, Kimberly	FUT		10/24/1995	(555)089-9241		
Parrish, John	FUT		6/4/1996	(555)089-9516	( ) -	
					Future Start	**3**
Interview Scheduled						
Edge, Karen	SCHED		8/1/2001	(555) 089-6634		
Galvin, Jill	SCHED		10/24/1995	(555)089-4920	( ) -	
Jeff, Jenkins J	SCHED		11/13/1998	(773)738-3838	(393)939-3939	
Sandra, Sampson S	SCHED		11/13/1998	(212)393-3338	(212)393-8937	

Campus Management

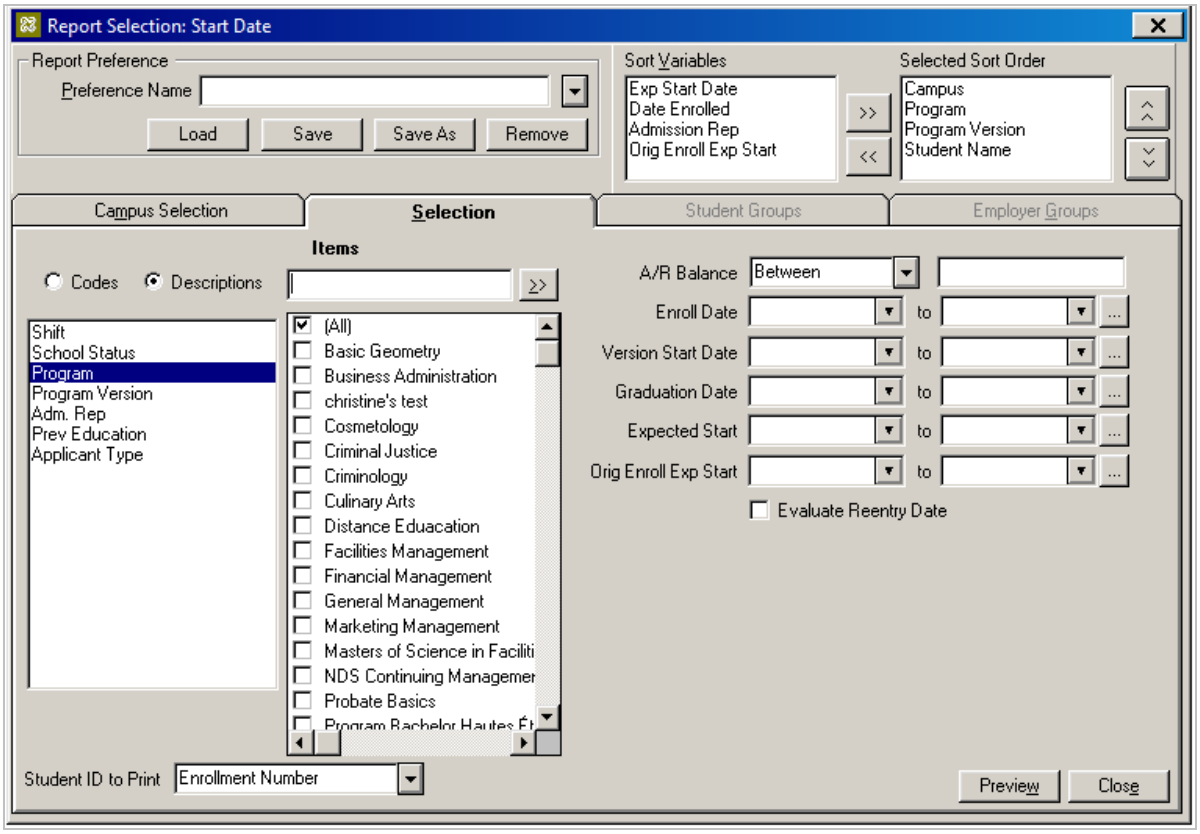
Page 1 of 7

Start Date

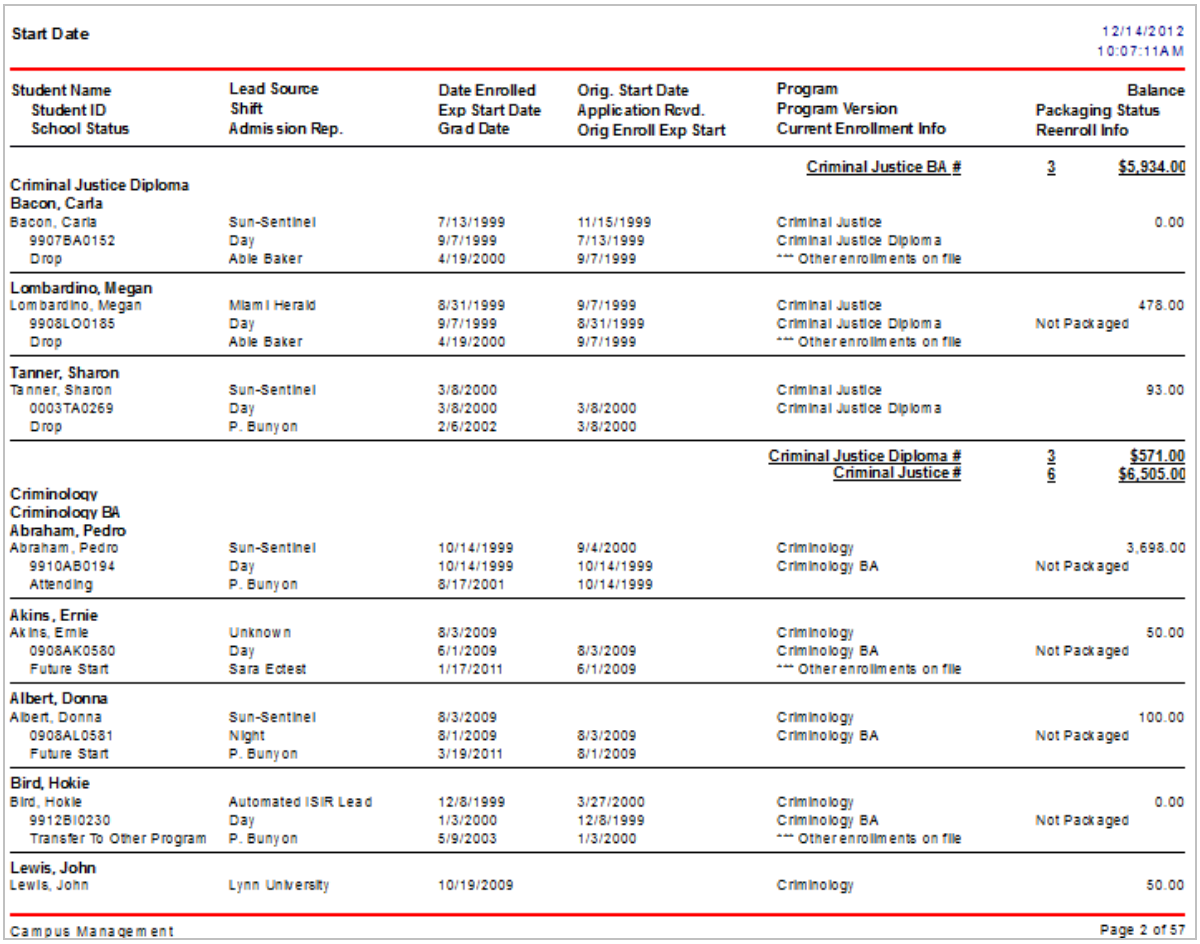
This report is a list of students with start dates and other information relevant to their enrollments.

To run the report:

1. Navigate to **Reports > Admissions > Start Date**. The Report Selection: Start Date form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. Click **Preview**. The report is assembled and displayed in the Report Viewer.



Start Date 12/14/2012 10:07:11AM

Student Name / Student ID / School Status	Lead Source / Shift / Admission Rep.	Date Enrolled / Exp Start Date / Grad Date	Orig. Start Date / Application Rcvd. / Orig Enroll Exp Start	Program / Program Version / Current Enrollment Info	Balance / Packaging Status / Reenroll Info
				Criminal Justice BA #	3 $5,934.00
Criminal Justice Diploma					
Bacon, Carla					
Bacon, Carla	Sun-Sentinel	7/13/1999	11/15/1999	Criminal Justice	0.00
9907BA0152	Day	9/7/1999	7/13/1999	Criminal Justice Diploma	
Drop	Able Baker	4/19/2000	9/7/1999	*** Other enrollments on file	
Lombardino, Megan					
Lombardino, Megan	Miami Herald	8/31/1999	9/7/1999	Criminal Justice	478.00
9908LO0185	Day	9/7/1999	8/31/1999	Criminal Justice Diploma	Not Packaged
Drop	Able Baker	4/19/2000	9/7/1999	*** Other enrollments on file	
Tanner, Sharon					
Tanner, Sharon	Sun-Sentinel	3/8/2000		Criminal Justice	93.00
0003TA0269	Day	3/8/2000	3/8/2000	Criminal Justice Diploma	
Drop	P. Bunyon	2/6/2002	3/8/2000		
				Criminal Justice Diploma #	3 $571.00
				Criminal Justice #	6 $6,505.00
Criminology					
Criminology BA					
Abraham, Pedro					
Abraham, Pedro	Sun-Sentinel	10/14/1999	9/4/2000	Criminology	3,698.00
9910AB0194	Day	10/14/1999	10/14/1999	Criminology BA	Not Packaged
Attending	P. Bunyon	8/17/2001	10/14/1999		
Akins, Ernie					
Akins, Ernie	Unknown	8/3/2009		Criminology	50.00
0908AK0580	Day	6/1/2009	8/3/2009	Criminology BA	Not Packaged
Future Start	Sara Ectest	1/17/2011	6/1/2009	*** Other enrollments on file	
Albert, Donna					
Albert, Donna	Sun-Sentinel	8/3/2009		Criminology	100.00
0908AL0581	Night	8/1/2009	8/3/2009	Criminology BA	Not Packaged
Future Start	P. Bunyon	3/19/2011	8/1/2009		
Bird, Hokie					
Bird, Hokie	Automated ISIR Lead	12/8/1999	3/27/2000	Criminology	0.00
9912BI0230	Day	1/3/2000	12/8/1999	Criminology BA	Not Packaged
Transfer To Other Program	P. Bunyon	5/9/2003	1/3/2000	*** Other enrollments on file	
Lewis, John					
Lewis, John	Lynn University	10/19/2009		Criminology	50.00

Campus Management Page 2 of 57

Starts - Actual vs. Budget

This report lists budgeted versus actual starts for each program of study. Some institutions refer to this report as the Future Starts report.

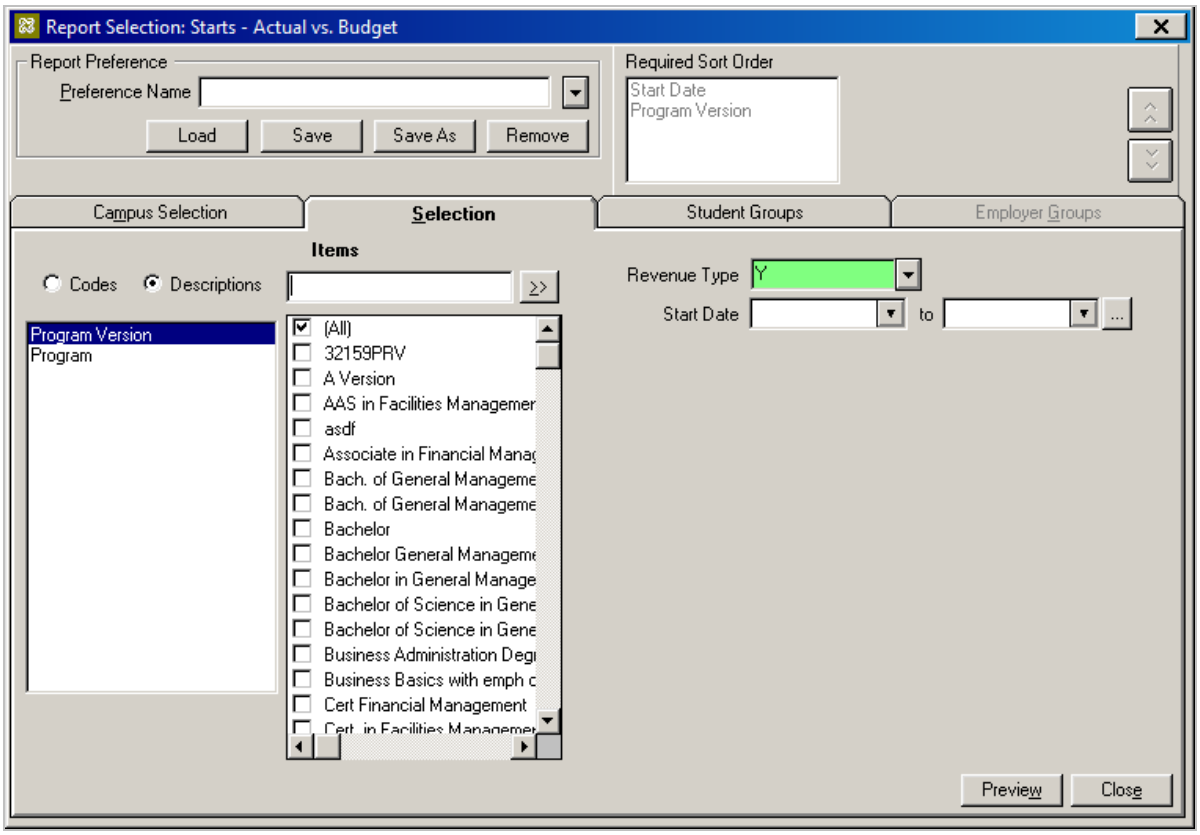
The start date for program versions is configured on **Lists > Academic Records > Programs > Edit > Versions > Edit > Start Date** form. Budgeted tuition cost is entered into the Budget Tuition field on the Start Date form. This number is used to calculate the Budgeted Tuition on the this report. This field is not required. Budget Tuition defaults to zero.

The Revenue Type criterion has no impact on the record set gathered for this report. The only effect Revenue Type has is how the revenue columns are calculated on the report. The Y option calculates revenue through the end of the year. The P option (default) calculates revenue through the end of the program.

To run the report:

1. Navigate to **Reports > Admissions > Starts - Actual vs. Budget**. The Report Selection: Starts - Actual vs. Budget form is displayed
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

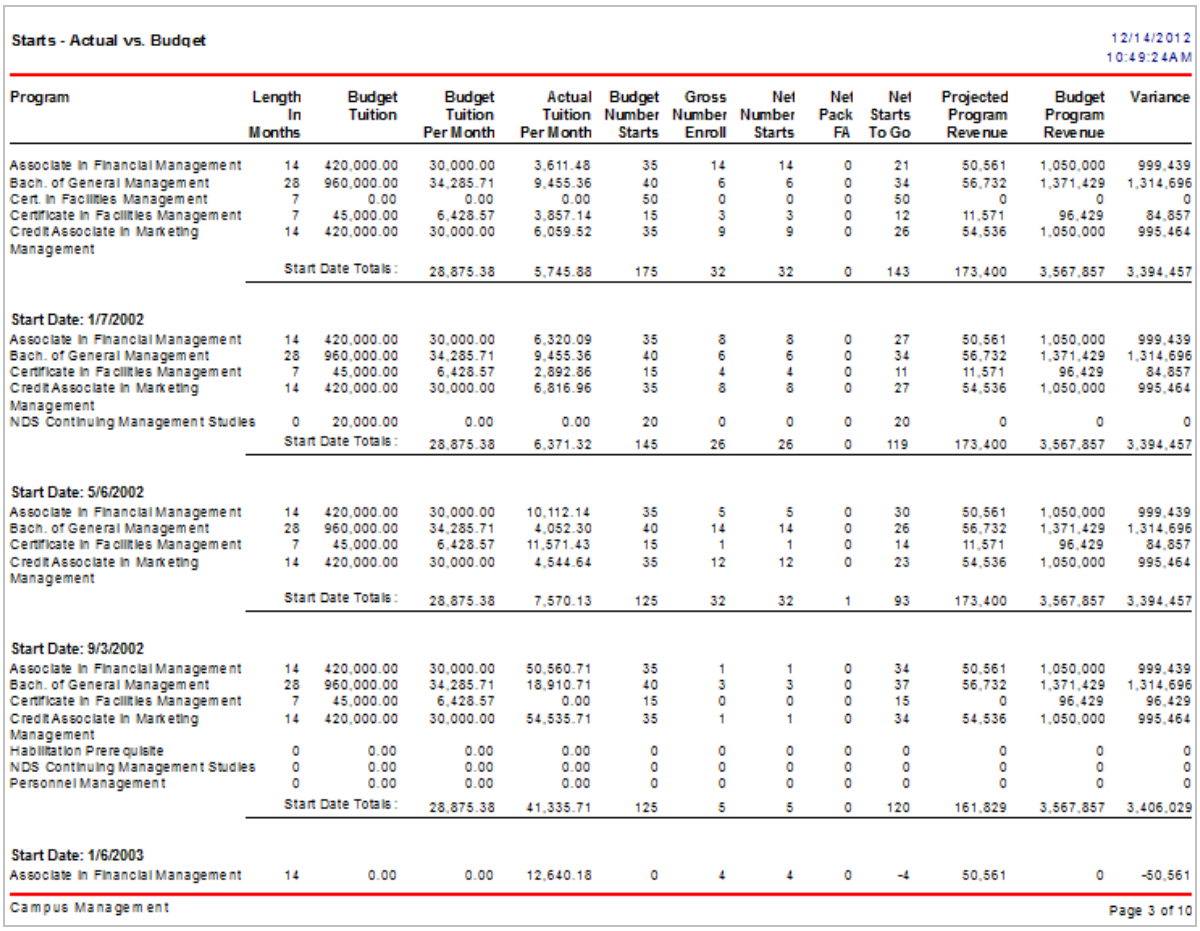
   Note: When both a Start Date Range and Campus Group are specified, a start date record from the Start Date table is included on the report if the Start Date is within the Start Date range criteria and the Program Version ID specified in the Start Date table includes a campus that is in the specified Campus group. The criteria for gathering records from the Start Date table are modified accordingly if only one or none of the criteria is specified.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.



Starts - Actual vs. Budget

12/14/2012 10:49:24AM

Program	Length In Months	Budget Tuition	Budget Tuition Per Month	Actual Tuition Per Month	Budget Number Starts	Gross Number Enroll	Net Number Starts	Net Pack FA	Net Starts To Go	Projected Program Revenue	Budget Program Revenue	Variance
Associate in Financial Management	14	420,000.00	30,000.00	3,611.48	35	14	14	0	21	50,561	1,050,000	999,439
Bach. of General Management	28	960,000.00	34,285.71	9,455.36	40	6	6	0	34	56,732	1,371,429	1,314,696
Cert. in Facilities Management	7	0.00	0.00	0.00	50	0	0	0	50	0	0	0
Certificate in Facilities Management	7	45,000.00	6,428.57	3,857.14	15	3	3	0	12	11,571	96,429	84,857
Credit Associate in Marketing Management	14	420,000.00	30,000.00	6,059.52	35	9	9	0	26	54,536	1,050,000	995,464
Start Date Totals:			28,875.38	5,745.88	175	32	32	0	143	173,400	3,567,857	3,394,457
Start Date: 1/7/2002												
Associate in Financial Management	14	420,000.00	30,000.00	6,320.09	35	8	8	0	27	50,561	1,050,000	999,439
Bach. of General Management	28	960,000.00	34,285.71	9,455.36	40	6	6	0	34	56,732	1,371,429	1,314,696
Certificate in Facilities Management	7	45,000.00	6,428.57	2,892.86	15	4	4	0	11	11,571	96,429	84,857
Credit Associate in Marketing Management	14	420,000.00	30,000.00	6,816.96	35	8	8	0	27	54,536	1,050,000	995,464
NDS Continuing Management Studies	0	20,000.00	0.00	0.00	20	0	0	0	20	0	0	0
Start Date Totals:			28,875.38	6,371.32	145	26	26	0	119	173,400	3,567,857	3,394,457
Start Date: 5/6/2002												
Associate in Financial Management	14	420,000.00	30,000.00	10,112.14	35	5	5	0	30	50,561	1,050,000	999,439
Bach. of General Management	28	960,000.00	34,285.71	4,052.30	40	14	14	0	26	56,732	1,371,429	1,314,696
Certificate in Facilities Management	7	45,000.00	6,428.57	11,571.43	15	1	1	0	14	11,571	96,429	84,857
Credit Associate in Marketing Management	14	420,000.00	30,000.00	4,544.64	35	12	12	0	23	54,536	1,050,000	995,464
Start Date Totals:			28,875.38	7,570.13	125	32	32	1	93	173,400	3,567,857	3,394,457
Start Date: 9/3/2002												
Associate in Financial Management	14	420,000.00	30,000.00	50,560.71	35	1	1	0	34	50,561	1,050,000	999,439
Bach. of General Management	28	960,000.00	34,285.71	18,910.71	40	3	3	0	37	56,732	1,371,429	1,314,696
Certificate in Facilities Management	7	45,000.00	6,428.57	0.00	15	0	0	0	15	0	96,429	96,429
Credit Associate in Marketing Management	14	420,000.00	30,000.00	54,535.71	35	1	1	0	34	54,536	1,050,000	995,464
Habilitation Prerequisite	0	0.00	0.00	0.00	0	0	0	0	0	0	0	0
NDS Continuing Management Studies	0	0.00	0.00	0.00	0	0	0	0	0	0	0	0
Personnel Management	0	0.00	0.00	0.00	0	0	0	0	0	0	0	0
Start Date Totals:			28,875.38	41,335.71	125	5	5	0	120	161,829	3,567,857	3,406,029
Start Date: 1/6/2003												
Associate in Financial Management	14	0.00	0.00	12,640.18	0	4	4	0	-4	50,561	0	-50,561

Campus Management

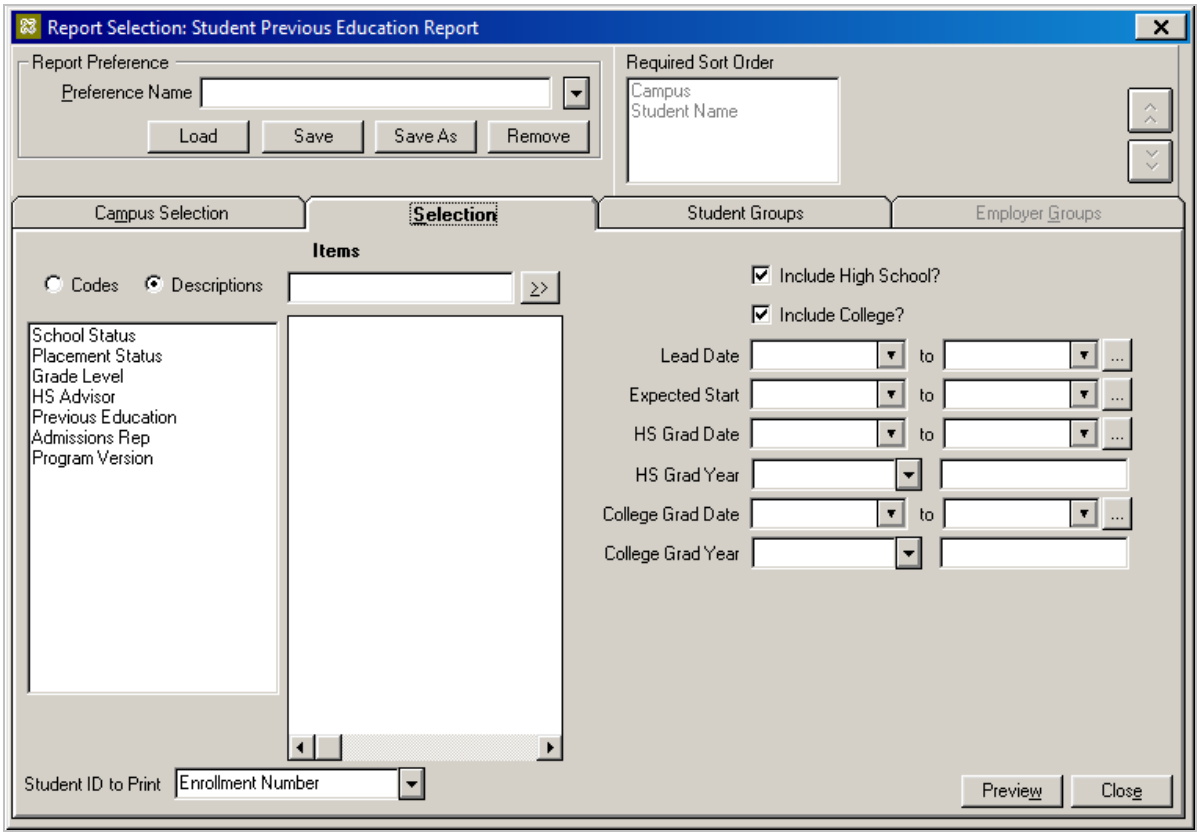
Page 3 of 10

Student Previous Education

This report gathers previous education information for a student's high school, college or both.

To run the report:

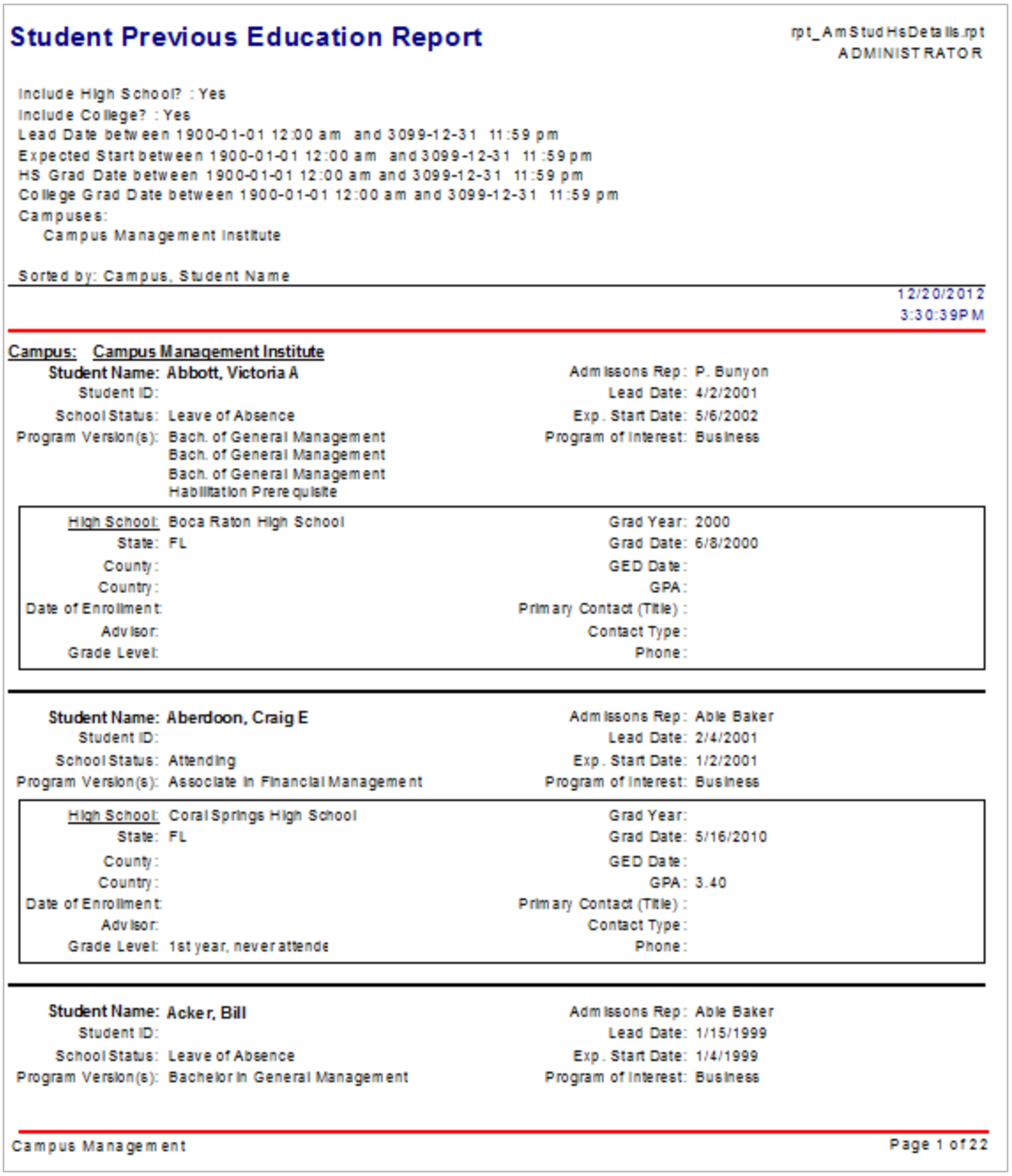
1. Navigate to **Reports > Admissions > Student Previous Education Report**. The Report Selection: Student Previous Education Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.



Student Previous Education Report

rpt_AmStudHsDetails.rpt
ADMINISTRATOR

Include High School? : Yes
Include College? : Yes
Lead Date between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Expected Start between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
HS Grad Date between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
College Grad Date between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Campuses:
Campus Management Institute

Sorted by: Campus, Student Name

12/20/2012
3:30:39PM

Campus: Campus Management Institute

Student Name: Abbott, Victoria A
Student ID:
School Status: Leave of Absence
Program Version(s): Bach. of General Management
Bach. of General Management
Bach. of General Management
Habilitation Prerequisite
Admissons Rep: P. Bunyon
Lead Date: 4/2/2001
Exp. Start Date: 5/6/2002
Program of Interest: Business

High School: Boca Raton High School
State: FL
County:
Country:
Date of Enrollment:
Advisor:
Grade Level:
Grad Year: 2000
Grad Date: 6/8/2000
GED Date:
GPA:
Primary Contact (Title):
Contact Type:
Phone:

Student Name: Aberdoon, Craig E
Student ID:
School Status: Attending
Program Version(s): Associate in Financial Management
Admissons Rep: Able Baker
Lead Date: 2/4/2001
Exp. Start Date: 1/2/2001
Program of Interest: Business

High School: Coral Springs High School
State: FL
County:
Country:
Date of Enrollment:
Advisor:
Grade Level: 1st year, never attende
Grad Year:
Grad Date: 5/16/2010
GED Date:
GPA: 3.40
Primary Contact (Title):
Contact Type:
Phone:

Student Name: Acker, Bill
Student ID:
School Status: Leave of Absence
Program Version(s): Bachelor in General Management
Admissons Rep: Able Baker
Lead Date: 1/15/1999
Exp. Start Date: 1/4/1999
Program of Interest: Business

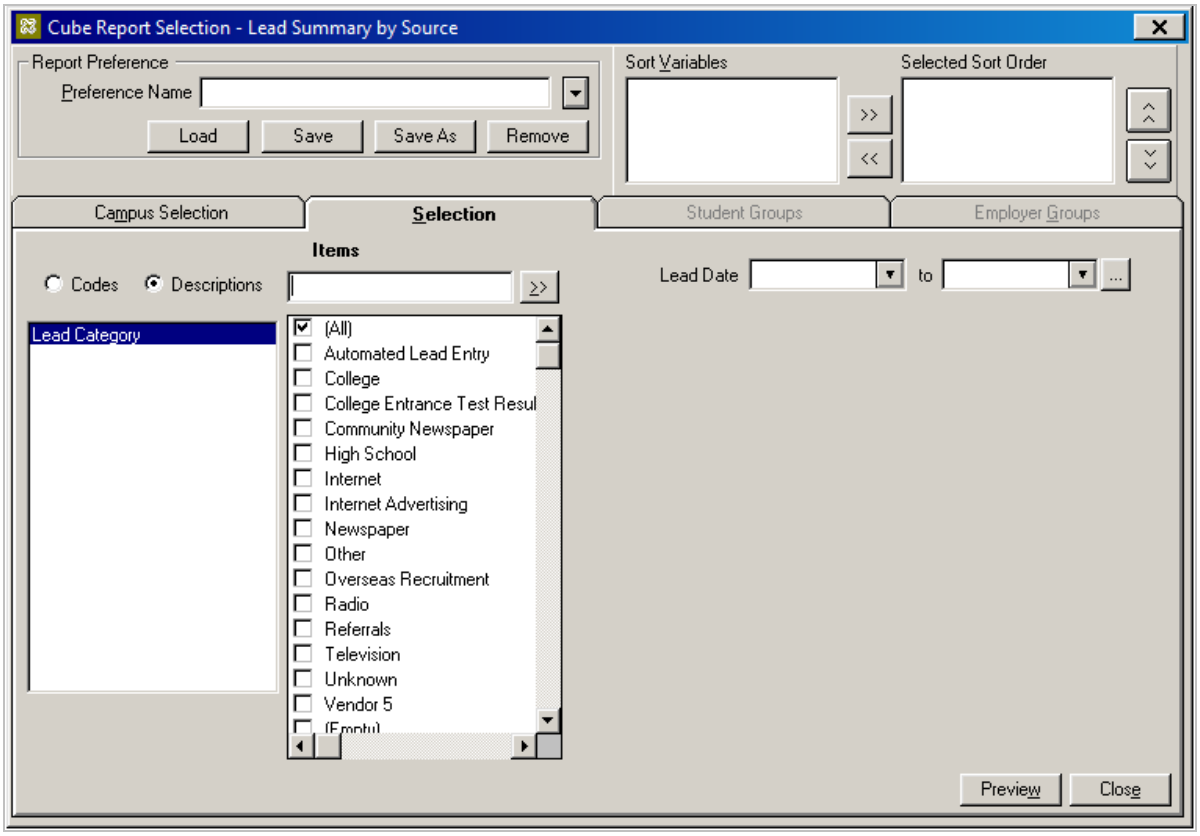
Campus Management
Page 1 of 22

Lead Summary by Source

This cube report is a tool to analyze lead sources. The available variables are year/month, lead date, and source.

To run the report:

1. Navigate to **Reports > Admissions > Lead Summary by Source**. The Cube Report Selection: Lead Summary by Source form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



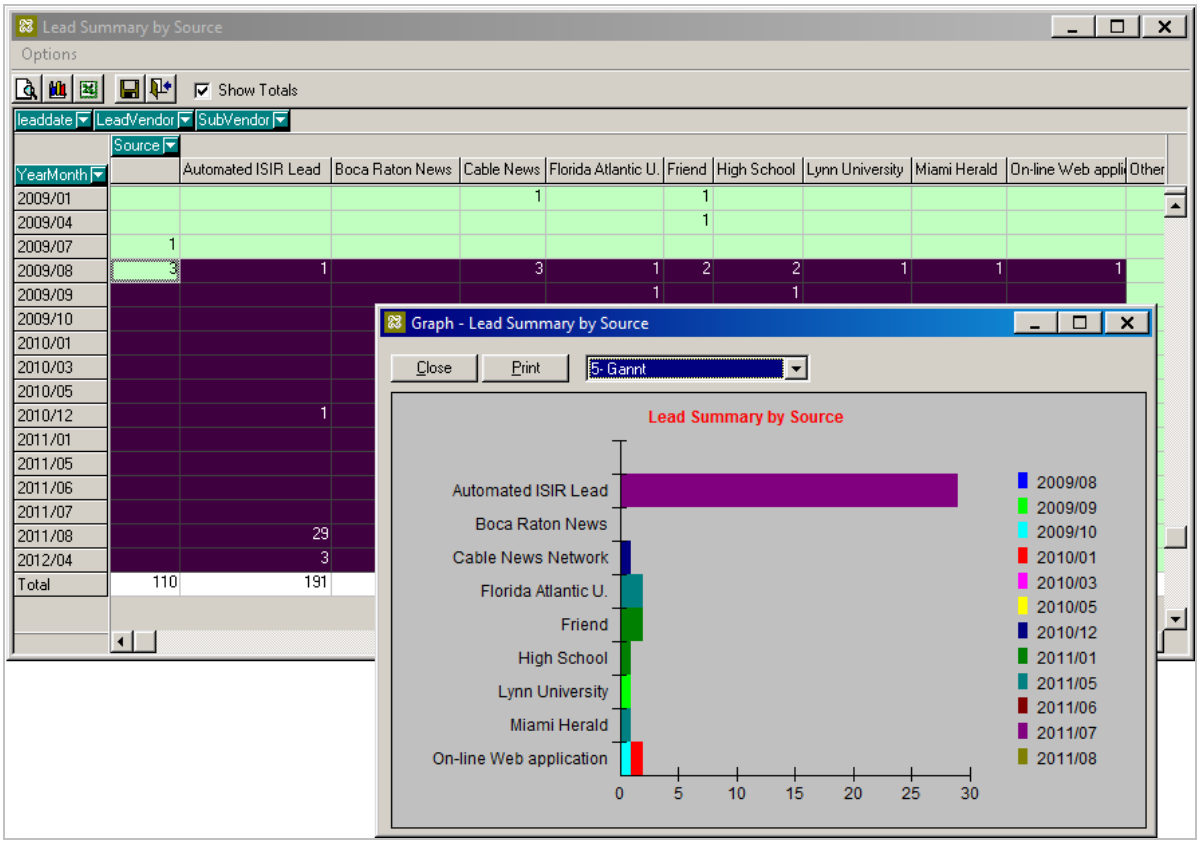
4. Click **Preview**. The cube report is assembled and displayed.

   The following variables are available for use in this cube report:

   - Lead Date
   - Lead Vendor
   - Sub Vendor
   - Source
   - Year/Month

   Drag the variables to the vertical or horizontal axes as needed to get the cross-tabulated spreads. The cube is ini-

tialized with Year/Month as the Y axis (rows) and Source as the X axis (columns).



Leads Analysis

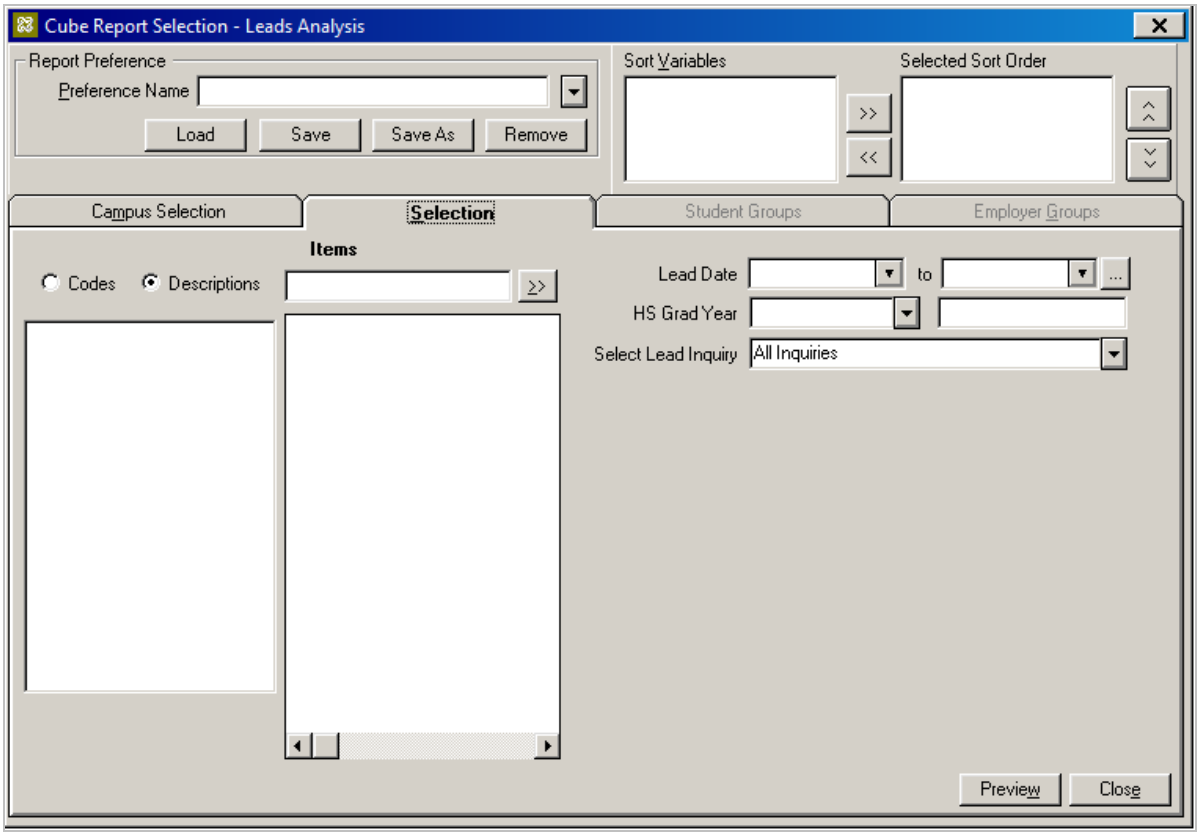
This cube report lists the leads converted by each admissions representative and includes a column showing the expected start date.

To run the report:

1. Navigate to **Reports > Admissions > Leads Analysis**. The Cube Report Selection: Leads Analysis form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Notes:

   - You can enter a lead date range or high school graduation year range for the data to be included.
   - The Select Lead Inquiry drop-down list provides options for displaying and printing multiple lead inquiries if the Track Multiple Lead Inquiries flag has been enabled. See Campus Allow for setup instructions.



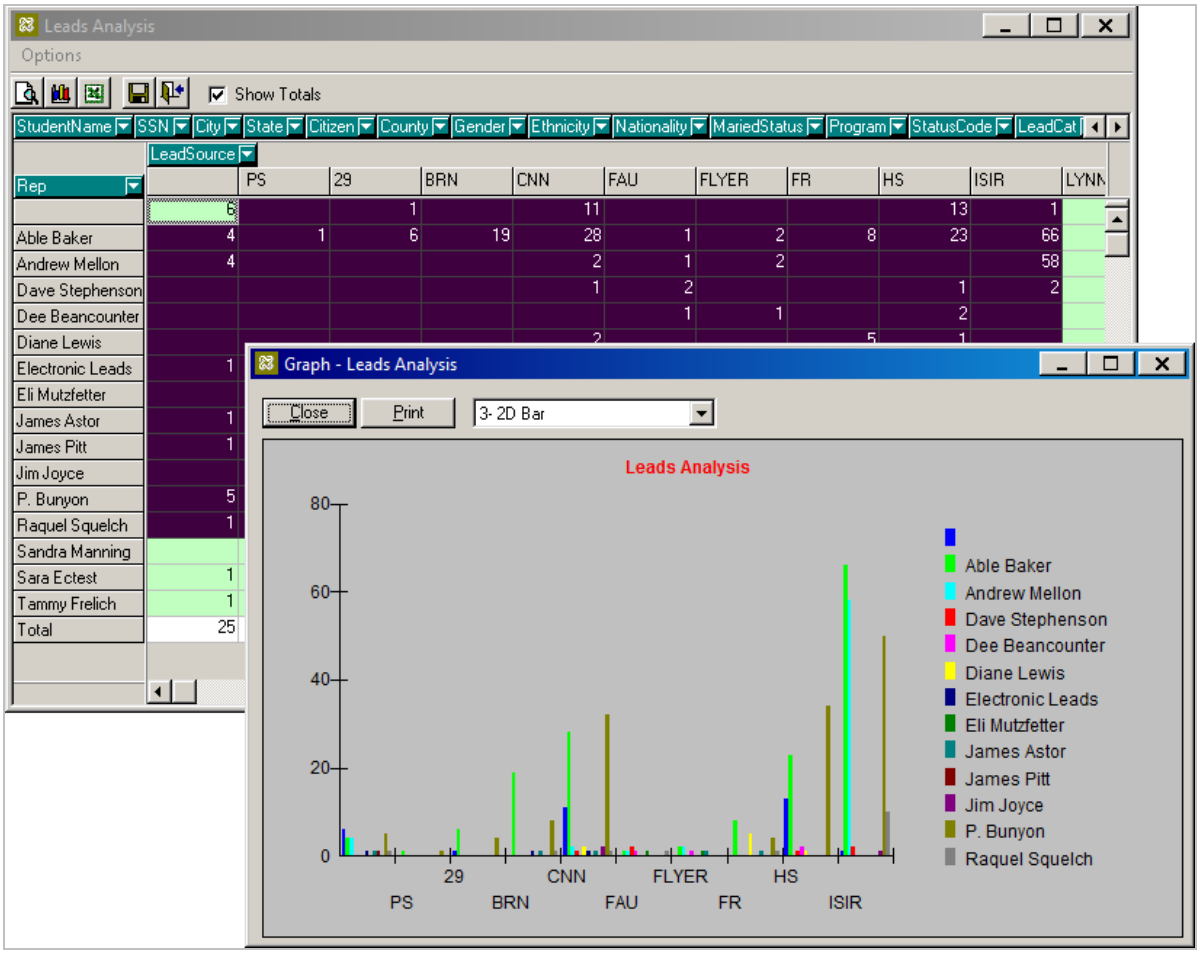
4. Click **Preview**. The cube report is assembled and displayed.

   The following variables are available for use in this cube report:

   - Student Name
   - SSN
     City

- State
- Citizen
- County
- Gender
- Ethnicity
- Nationality
- Marital Status
- Program
- Status Code
- Lead Category
- Month
- Year
- Quarter
- Week
- Lead Date
- Interest
- Sponsor
- ZIP
- Campus
- Lead Type
- HS Graduation Year
- Lead Vendor
- Sub Vendor
- Expected Start Date
- Ethnicity
- Lead Source
- Admissions Representative

Drag the variables to the vertical or horizontal axes as needed to get the cross-tabulated spreads. The cube is initialized with Year/Month as the Y axis (rows) and Source as the X axis (columns).

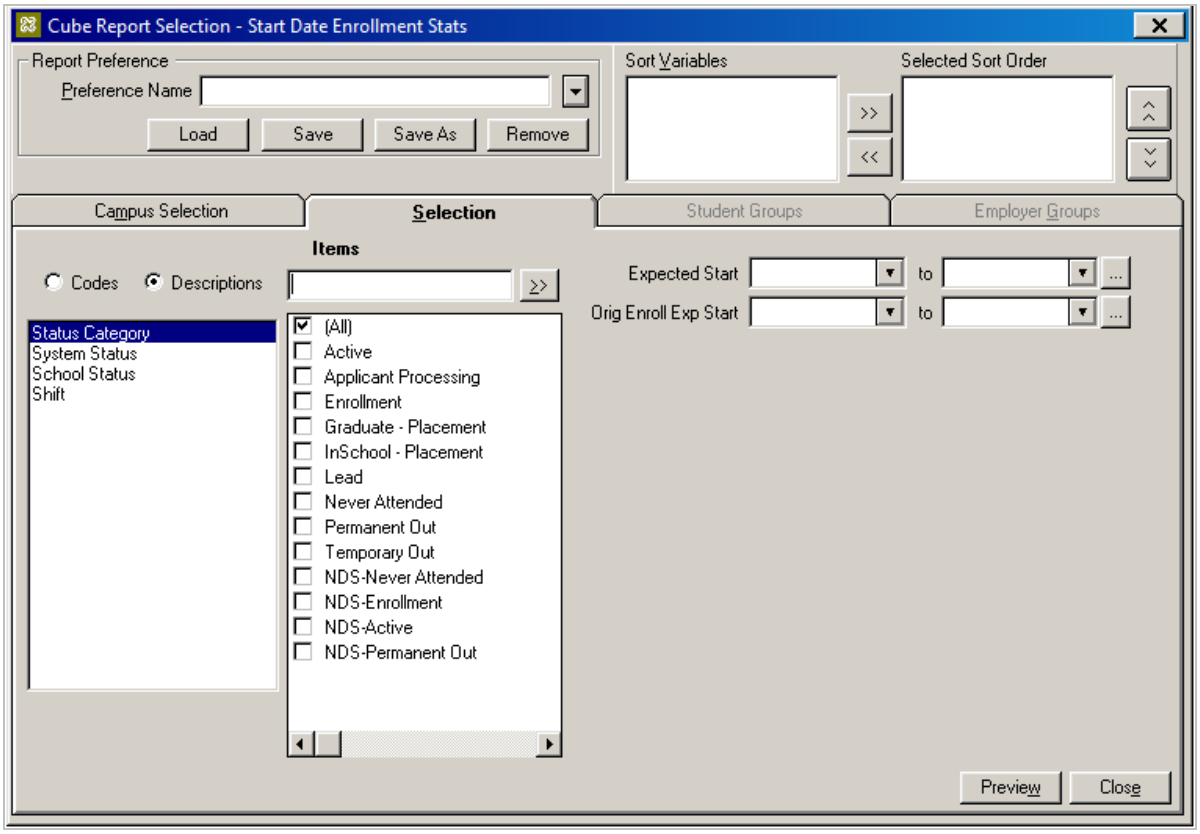

Leads Analysis
Options
Show Totals
StudentName
SSN
City
State
Citizen
County
Gender
Ethnicity
Nationality
MaritalStatus
Program
StatusCode
LeadCat
LeadSource
Rep
PS
29
BRN
CNN
FAU
FLYER
FR
HS
ISIR
LYNN
Able Baker
Andrew Mellon
Dave Stephenson
Dee Beancounter
Diane Lewis
Electronic Leads
Eli Mutzfetter
James Astor
James Pitt
Jim Joyce
P. Bunyon
Raquel Squelch
Sandra Manning
Sara Ectest
Tammy Frelich
Total
Graph - Leads Analysis
Close
Print
3- 2D Bar
Leads Analysis
80
60
40
20
0
PS
29
BRN
CNN
FAU
FLYER
FR
HS
ISIR
Able Baker
Andrew Mellon
Dave Stephenson
Dee Beancounter
Diane Lewis
Electronic Leads
Eli Mutzfetter
James Astor
James Pitt
Jim Joyce
P. Bunyon
Raquel Squelch

Start Date Enrollment Stats

This cube report shows the current enrollment statistics for each available start date. This report enables you to quickly view every possible combination of program version and start date and the number of students currently enrolled in each version/date combination. The report also compares currently enrolled to budgeted number of starts.

To run the report:

1. Navigate to **Reports > Admissions > Start Date Enrollment Stats**. The Cube Report Selection: Start Date Enrollment Stats form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



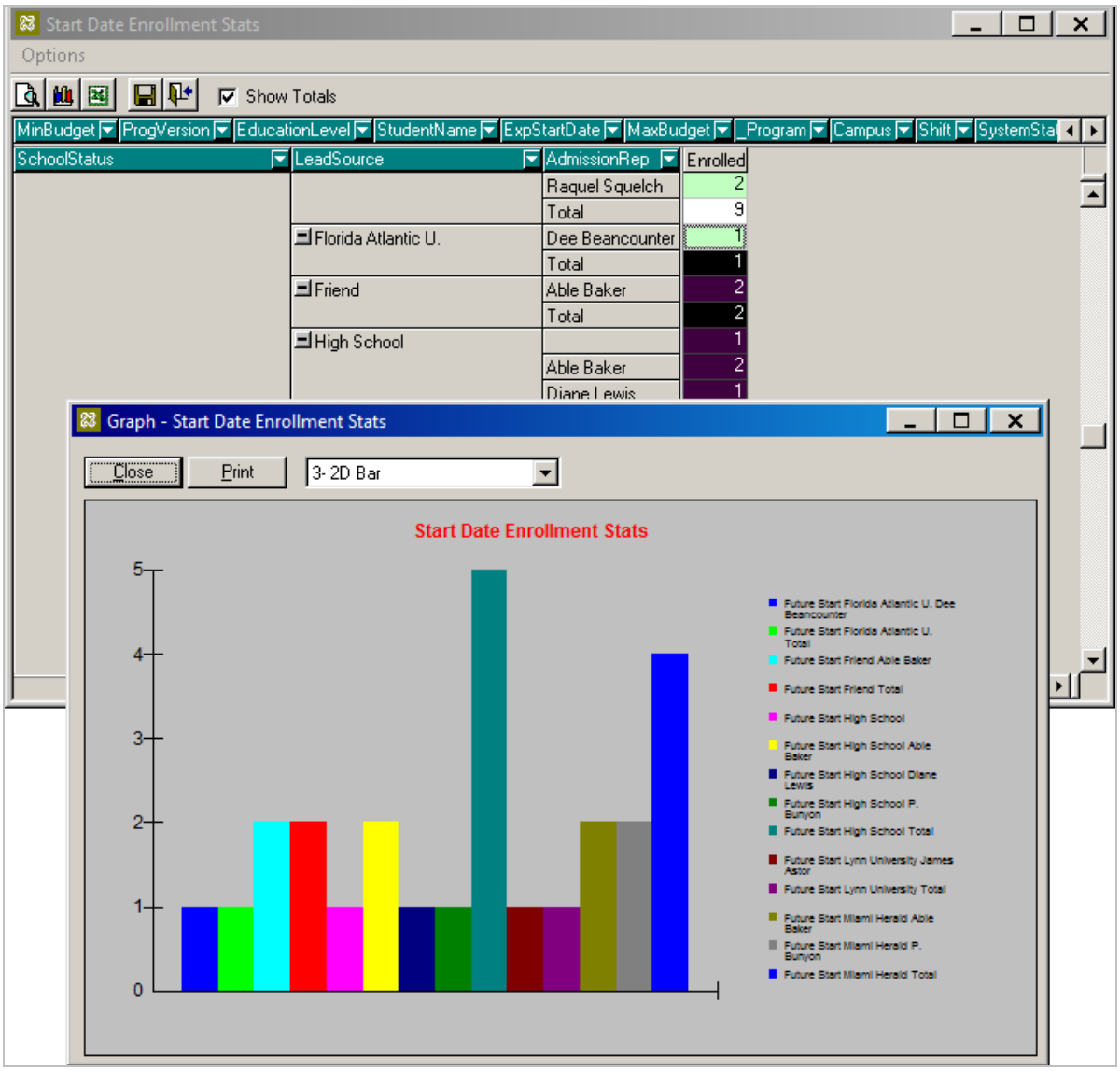
4. Click **Preview**. The cube report is assembled and displayed.

   The following variables are available for use in this cube report:

   - Student Name
   - Program Version
   - Minimum Budget
   - Maximum Budget
   - School Status
   - Shift
   - Campus
   - Program

- System Status
- Admissions Representative
- Lead Source
- Education Level
- Re-Entry Date
- Packaging Status
- Category
- Original Enrollment Expected Start
- Expected Start
- Enrolled
- Expected Start Date

Drag the variables to the vertical or horizontal axes as needed to get the cross-tabulated spreads. The cube is initialized with Expected Start Date as the Y axis (rows) and Enrolled as the X axis (columns).



Financial Aid Reports

Note: For the latest content about FAFSA, ISIR and COD processing, access Regulatory Help.

Use the **Reports > Financial Aid** menu to access the following Financial Aid reports:

- 2003-2004 Signature Hold
- Academic Year and Graduation Date Audit
- ACG Data Report
- COD Disbursement Analysis
- COD Extract Report
- COD Grant Origination Status
- COD Grant Tracking Report (Pell grants are included in the COD grants reports.)
- COD Response Import
- Direct Loan Analysis Report
- Direct Loan Disbursement Batch Activity
- Direct Loan Origination Batch Activity
- Direct Loan Origination Change Batch Activity
- Expected Cash Flow Detail Report
- Expected Cash Flow Summary
- FA Batch Posting Work-Study (Work-Study Payments Report)
- FA Disbursement Batch Tracking
- FA Export/Import Batch Tracking
- FA Status Report
- FAFSA Status
- FAGL Chart of Accounts Report
- Federal Parent PLUS Dependency Status Conflicts Report
- Federal Work Study Reconciliation Report
- Financial Aid G/L Authorization Detail
- Financial Aid G/L Authorization Summary
- Financial Aid G/L Transaction Detail
- Financial Aid G/L Trial Balance
- FISAP or FISAP Detail Reports
- FISAP or FISAP Detail Reports (Prior to 2005-06)
- Fund Source Activity Summary Report
- Hope Evaluation Report
- HOPE Summary Report
- ISIR Summary Report
- Packaged Enrollment Status
- Packaging Summary
- Past Due Summary Cash Flow
- Progress Report
- Refund Details
- Remaining Balance To Schedule (Acad. Year)
- Remaining Balance To Schedule (Full Program)
- Remaining Balance To Schedule (Term)
- Remaining Balance To Schedule by Course
- Student Financial Aid History
- Student Financial Aid Summary
- Student Financial Aid Summary By Term
- Student Financial Aid Summary by Payment Period
- Students Failing Disbursement Criteria Report
- Unmatched ISIRs

For information about Servicer Reports, see Servicer Integration Overview, Servicer Batch History Report, Servicer Daily Transaction Audit, Disbursement Batch Review

Note: The System Administrator must set up security rights to view, print, or export reports. Staff members and staff groups must be given security rights to view, print, and/or export reports. This does not apply to custom reports.

2003-2004 Signature Hold

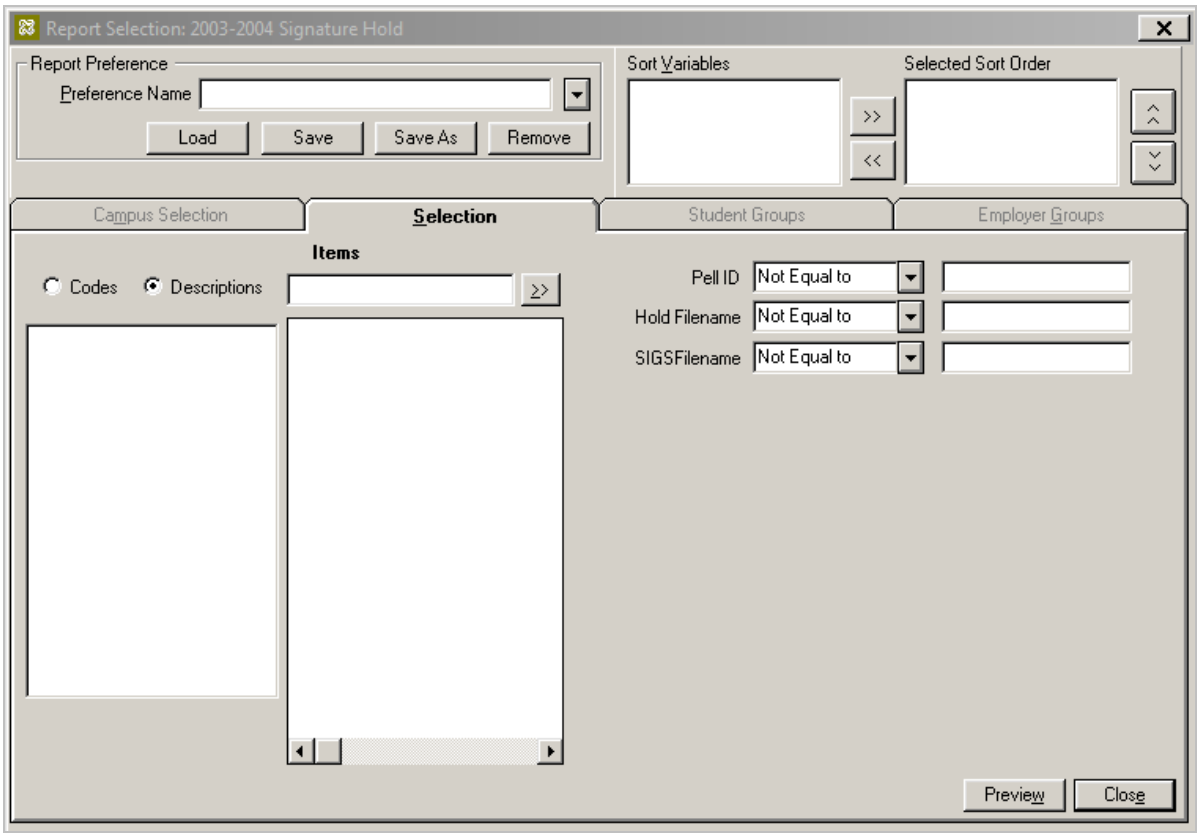
Note: For the latest content about FAFSA, ISIR, and COD processing, access Regulatory Help.

This report was used to list FAFSA applicants that did not provide an electronic or paper signature with their application. The FAFSA application remained in a signature hold file for up to 14 days. it was not processed again until a signature was is received.

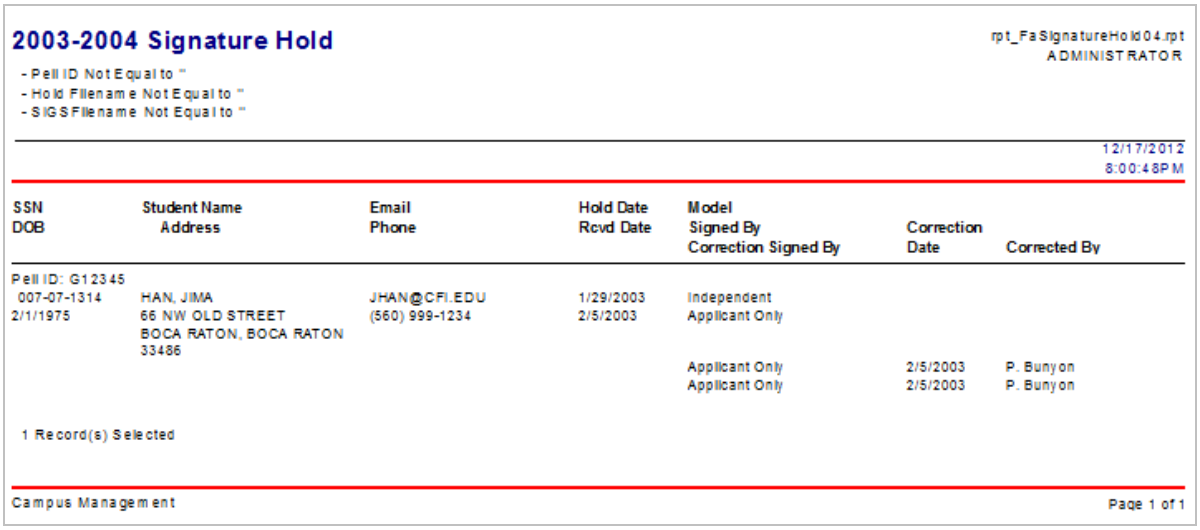
Note: The Department of Education discontinued Signature Hold Files beginning with the 2005-06 FA Award Year.

To run the report:

1. Navigate to **Reports > Financial Aid > 2003-2004 Signature Hold**. The Report Selection: 2003-2004 Signature Hold form is displayed.
2. Select appropriate options on the Selection tab.



3. Click **Preview**. The report is assembled and displayed in the Report Viewer.



2003-2004 Signature Hold

rpt_FaSignatureHold04.rpt
ADMINISTRATOR

- Pell ID Not Equal to ''
- Hold Filename Not Equal to ''
- SIGS Filename Not Equal to ''

12/17/2012
8:00:48PM

SSN DOB	Student Name Address	Email Phone	Hold Date Rcvd Date	Model Signed By Correction Signed By	Correction Date	Corrected By
Pell ID: G12345 007-07-1314 2/1/1975	HAN, JIMA 66 NW OLD STREET BOCA RATON, BOCA RATON 33486	JHAN@CFI.EDU (560) 999-1234	1/29/2003 2/5/2003	Independent Applicant Only		
				Applicant Only Applicant Only	2/5/2003 2/5/2003	P. Bunyon P. Bunyon

1 Record(s) Selected

Campus Management

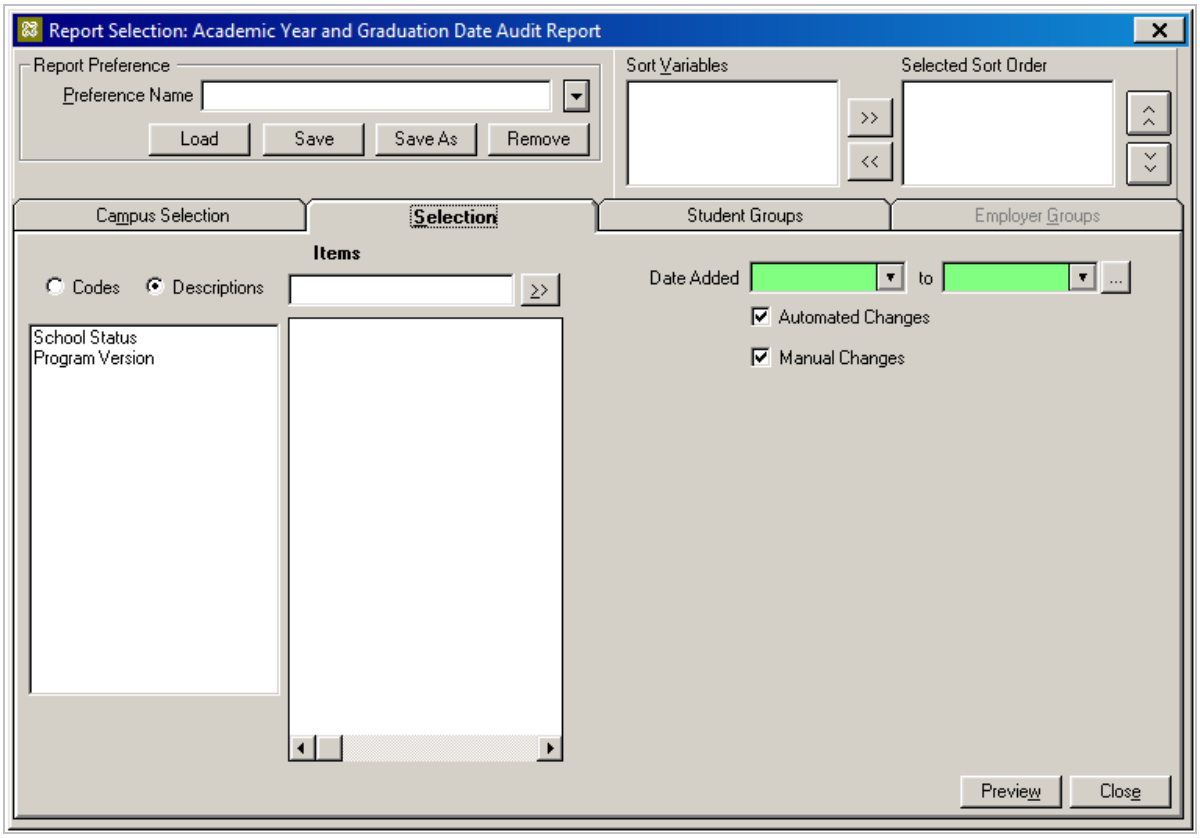
Page 1 of 1

Academic Year and Graduation Date Audit

This report details each academic year record, payment period record, scheduled disbursement record, and academic year based housing lease that has been changed. It also displays disbursement records that have been or will be changed by the Automated Processes.

To run the report:

1. Navigate to **Reports > Financial Aid > Academic Year and Graduation Date Audit Report**. The Report Selection: Academic Year and Graduation Date Audit Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

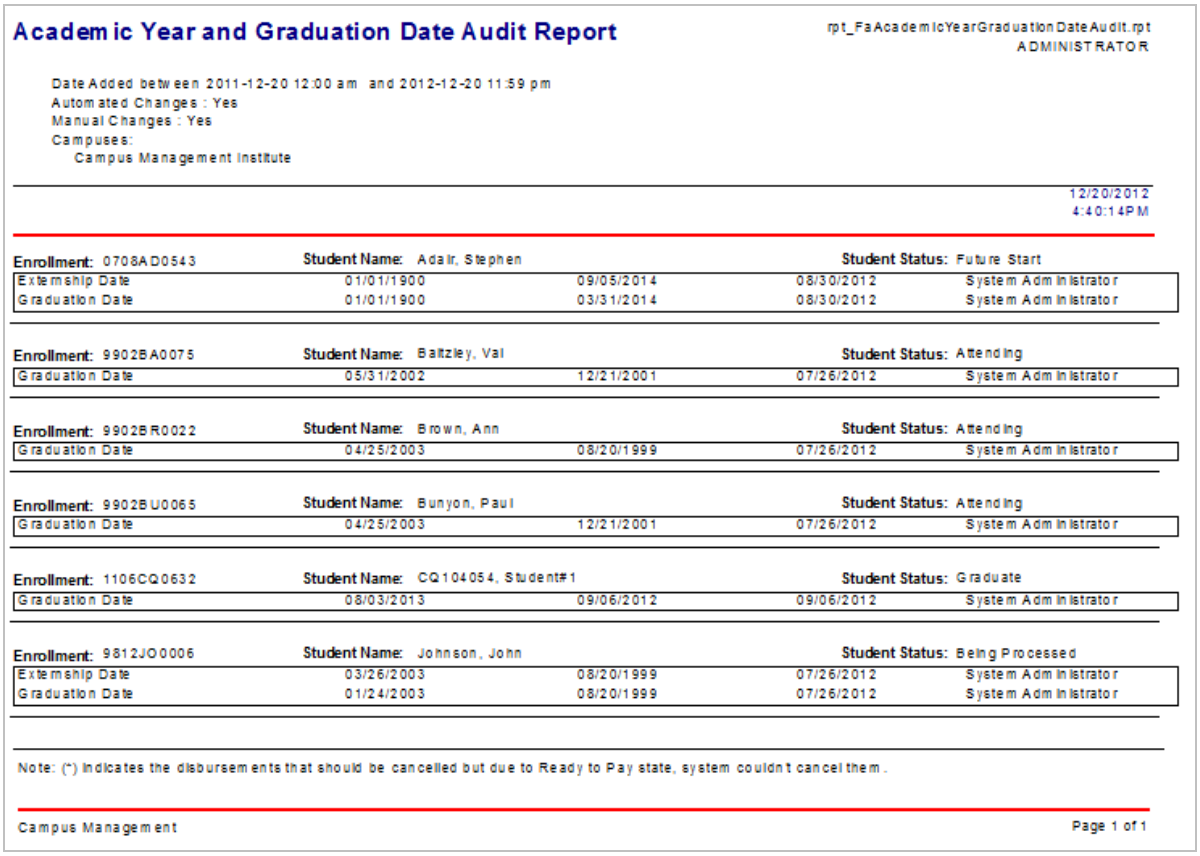


4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   For each enrollment, the report indicates the Student Name, Student Status and then displays one or more sections depending on the changes that occurred.



Academic Year and Graduation Date Audit Report

rpt_FaAcademicYearGraduationDateAudit.rpt
ADMINISTRATOR

Date Added between 2011-12-20 12:00 am and 2012-12-20 11:59 pm
Automated Changes : Yes
Manual Changes : Yes
Campuses:
Campus Management Institute

12/20/2012
4:40:14PM

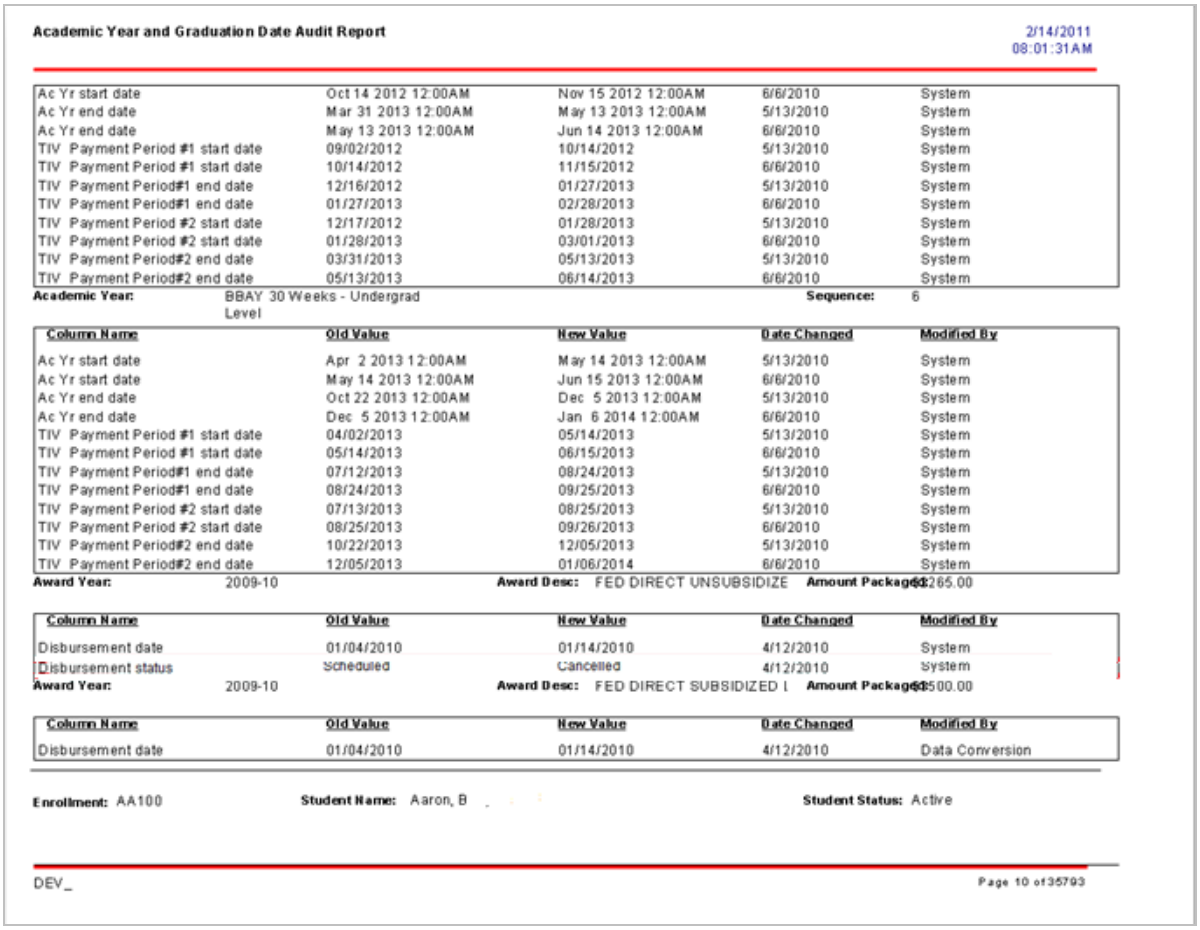
Enrollment: 0708AD0543	**Student Name:** Adair, Stephen			**Student Status:** Future Start	
Externship Date	01/01/1900	09/05/2014	08/30/2012	System Administrator	
Graduation Date	01/01/1900	03/31/2014	08/30/2012	System Administrator	
Enrollment: 9902BA0075	**Student Name:** Baltzley, Val			**Student Status:** Attending	
Graduation Date	05/31/2002	12/21/2001	07/26/2012	System Administrator	
Enrollment: 9902BR0022	**Student Name:** Brown, Ann			**Student Status:** Attending	
Graduation Date	04/25/2003	08/20/1999	07/26/2012	System Administrator	
Enrollment: 9902BU0065	**Student Name:** Bunyon, Paul			**Student Status:** Attending	
Graduation Date	04/25/2003	12/21/2001	07/26/2012	System Administrator	
Enrollment: 1106CQ0632	**Student Name:** CQ104054, Student#1			**Student Status:** Graduate	
Graduation Date	08/03/2013	09/06/2012	09/06/2012	System Administrator	
Enrollment: 9812JO0006	**Student Name:** Johnson, John			**Student Status:** Being Processed	
Externship Date	03/26/2003	08/20/1999	07/26/2012	System Administrator	
Graduation Date	01/24/2003	08/20/1999	07/26/2012	System Administrator	

Note: (*) indicates the disbursements that should be cancelled but due to Ready to Pay state, system couldn't cancel them.

Campus Management Page 1 of 1

Each section display columns containing the name of the field changed, Old Value, New Value, Date Changed and Modified By.

- If a change to the student's Enrollment occurred, the Enrollment Record # and Student Status are displayed as well as any changes that occurred to the student's Expected Graduation Date or Externship Date.
- If a student's Academic Year based Award information changed, the Academic Year, and Sequence # are displayed as well as any changes that occurred to the Ac Yr Start Date, Ac Yr End Date, and any Payment Period Start Date, Payment Period End Date, Disbursement Date, Disbursement Status, Award Amount, or Award Description.
- If there are any modifications to the BBAY Start and End Dates, on the Loan Period, and the Loan Period Seq, AcYr Start and End Dates on the Direct Loan forms, these changes are being recorded in the FA Audit and are also reported in the Graduation and Academic Year Audit report.
- If a student has a housing lease that is based on one or more Academic Years and changes have occurred to the lease information, the report displays the Housing Academic Year, Sequence #, and any changes that occurred to the Lease Start Date or Lease End Date.



Academic Year and Graduation Date Audit Report

2/14/2011
08:01:31AM

Ac Yr start date	Oct 14 2012 12:00AM	Nov 15 2012 12:00AM	6/6/2010	System
Ac Yr end date	Mar 31 2013 12:00AM	May 13 2013 12:00AM	5/13/2010	System
Ac Yr end date	May 13 2013 12:00AM	Jun 14 2013 12:00AM	6/6/2010	System
TIV Payment Period #1 start date	09/02/2012	10/14/2012	5/13/2010	System
TIV Payment Period #1 start date	10/14/2012	11/15/2012	6/6/2010	System
TIV Payment Period#1 end date	12/16/2012	01/27/2013	5/13/2010	System
TIV Payment Period#1 end date	01/27/2013	02/28/2013	6/6/2010	System
TIV Payment Period #2 start date	12/17/2012	01/28/2013	5/13/2010	System
TIV Payment Period #2 start date	01/28/2013	03/01/2013	6/6/2010	System
TIV Payment Period#2 end date	03/31/2013	05/13/2013	5/13/2010	System
TIV Payment Period#2 end date	05/13/2013	06/14/2013	6/6/2010	System

Academic Year: BBAY 30 Weeks - Undergrad Level **Sequence:** 6

Column Name	Old Value	New Value	Date Changed	Modified By
Ac Yr start date	Apr 2 2013 12:00AM	May 14 2013 12:00AM	5/13/2010	System
Ac Yr start date	May 14 2013 12:00AM	Jun 15 2013 12:00AM	6/6/2010	System
Ac Yr end date	Oct 22 2013 12:00AM	Dec 5 2013 12:00AM	5/13/2010	System
Ac Yr end date	Dec 5 2013 12:00AM	Jan 6 2014 12:00AM	6/6/2010	System
TIV Payment Period #1 start date	04/02/2013	05/14/2013	5/13/2010	System
TIV Payment Period #1 start date	05/14/2013	06/15/2013	6/6/2010	System
TIV Payment Period#1 end date	07/12/2013	08/24/2013	5/13/2010	System
TIV Payment Period#1 end date	08/24/2013	09/25/2013	6/6/2010	System
TIV Payment Period #2 start date	07/13/2013	08/25/2013	5/13/2010	System
TIV Payment Period #2 start date	08/25/2013	09/26/2013	6/6/2010	System
TIV Payment Period#2 end date	10/22/2013	12/05/2013	5/13/2010	System
TIV Payment Period#2 end date	12/05/2013	01/06/2014	6/6/2010	System

Award Year: 2009-10 **Award Desc:** FED DIRECT UNSUBSIDIZE **Amount Packaged:** $3265.00

Column Name	Old Value	New Value	Date Changed	Modified By
Disbursement date	01/04/2010	01/14/2010	4/12/2010	System
Disbursement status	Scheduled	Cancelled	4/12/2010	System

Award Year: 2009-10 **Award Desc:** FED DIRECT SUBSIDIZED I **Amount Packaged:** $3500.00

Column Name	Old Value	New Value	Date Changed	Modified By
Disbursement date	01/04/2010	01/14/2010	4/12/2010	Data Conversion

Enrollment: AA100 **Student Name:** Aaron, B **Student Status:** Active

DEV_

Page 10 of 35793

ACG Data Report

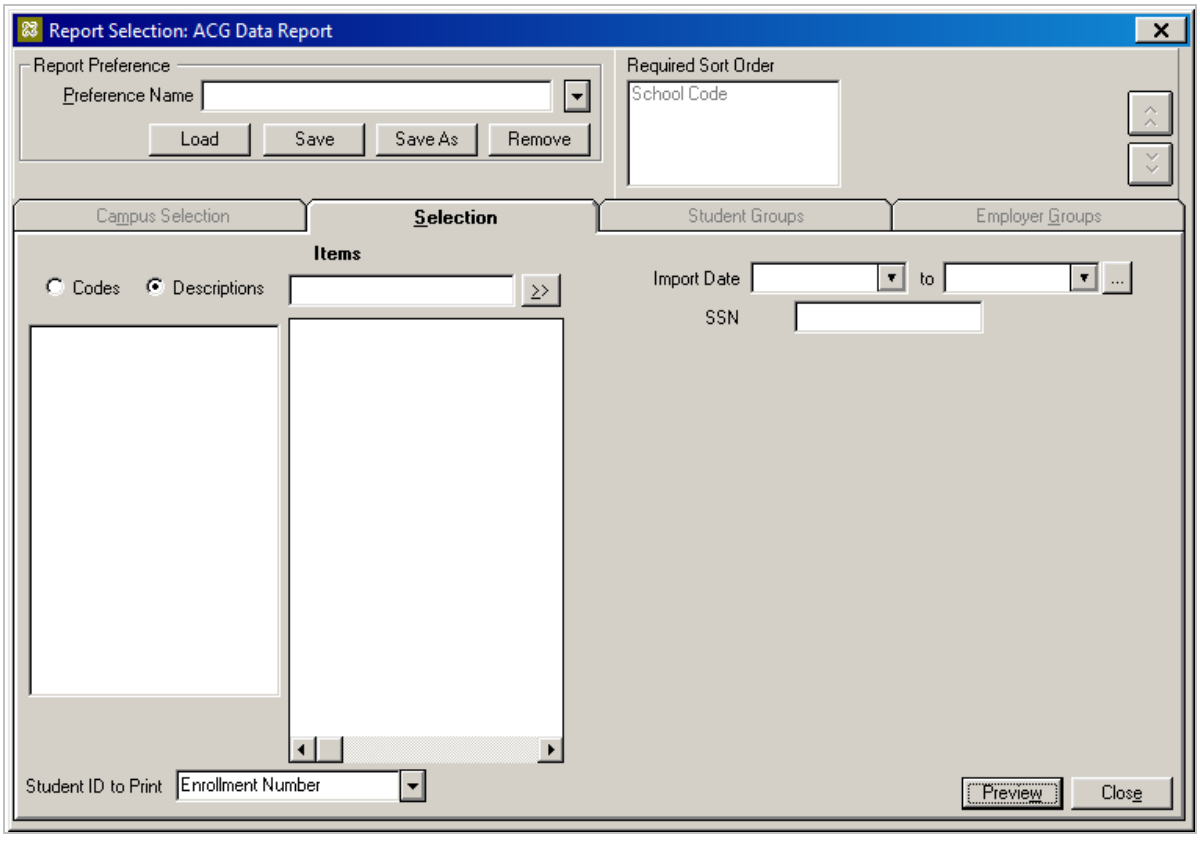
The Academic Competitiveness Grant (ACG) was authorized by the Higher Education Reconciliation Act (HERA). On July 29, 2006, the COD System began sending Electronic Statement of Account (ESOA) reports reflecting authorizations for the new grants to schools. Students must be U.S. citizens and eligible for a Pell Grant to be eligible for either of these grants.

The report is imported through the Import Application Data process.

- The Campus School Code (Campus Setup) associated with the Federal School Code contained in the file is used to determine the Campus Description displayed on the report. This Campus description is printed on the report in a group header.
- The report groups students by Campus (also determined by finding the School Code in Campus Setup that matches the Federal School Code in the file).

To run the report:

1. Navigate to **Reports > Financial Aid > ACG Data Report**. The Report Selection: ACG Data Report form is displayed.
2. Select appropriate options on the Selection tab.



3. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

- Award years
- Original SSN
- Original Name ID
- Transaction number
- Student Name
- Date of Birth
- Whether the student graduated before 1/1/05 (Yes/No)
- High School State
- High School Program Code
- AP or IB (Yes/No)
- Rigorous Courses (Yes/No)
- Federal School ID

COD Disbursement Analysis

This report summarizes the total COD disbursements and compares that number to the total COD disbursements posted as received in CampusNexus Student (see **View** > **Financial Aid** > **Packaging** > **Add/Edit** > **Package**). The report shows only those students that have a record for the Award Year selected.

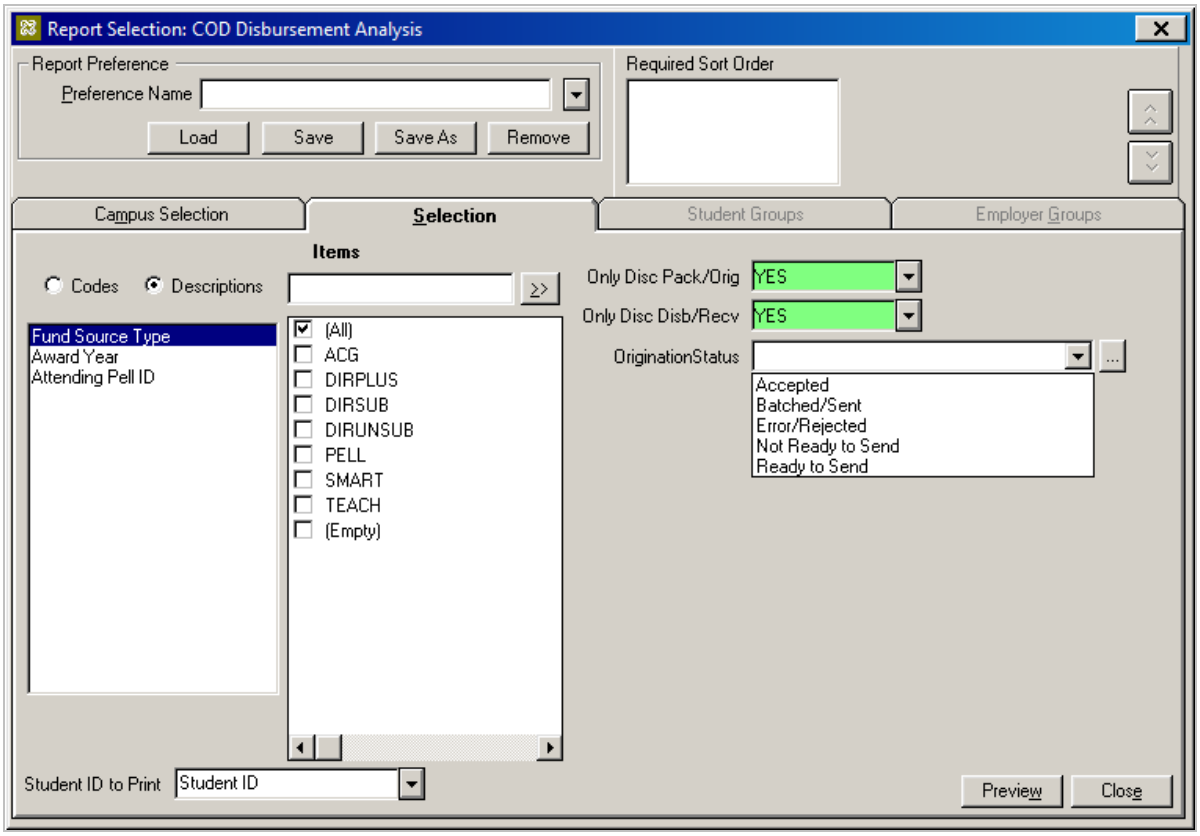
To run the report:

1. Navigate to **Reports > Financial Aid > COD Disbursement Analysis**. The Report Selection: COD Disbursement Analysis form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Notes:

   - If the COD Award Amount differs from the Origination Amount, you can select the Only Disc Pack/Orig field to only list discrepancies between the COD Award Amount and the Origination Amount.
   - If the Disbursed Amount Accepted differs from the Amount Received, you can select the Only Disc Dis-b/Recv field to only list discrepancies between the Disbursed Amount and the Amount Received.

     Both fields allow you to select Yes or No. If you select No in either field, the report displays all records. If you select Yes in either field, the report shows those students where the selected amounts are different.
   - The Origination Status options include: Accepted, Batched/Sent, Error/Rejected, Not Ready to Send, and Ready to Send.
   - The Additional Eligibility Indicator Only? check box is disabled by default. The check box becomes enabled when the Fund Source Type is Pell (and any of the other awards), combined with an Award Year equal to or greater than 2009-10.



4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

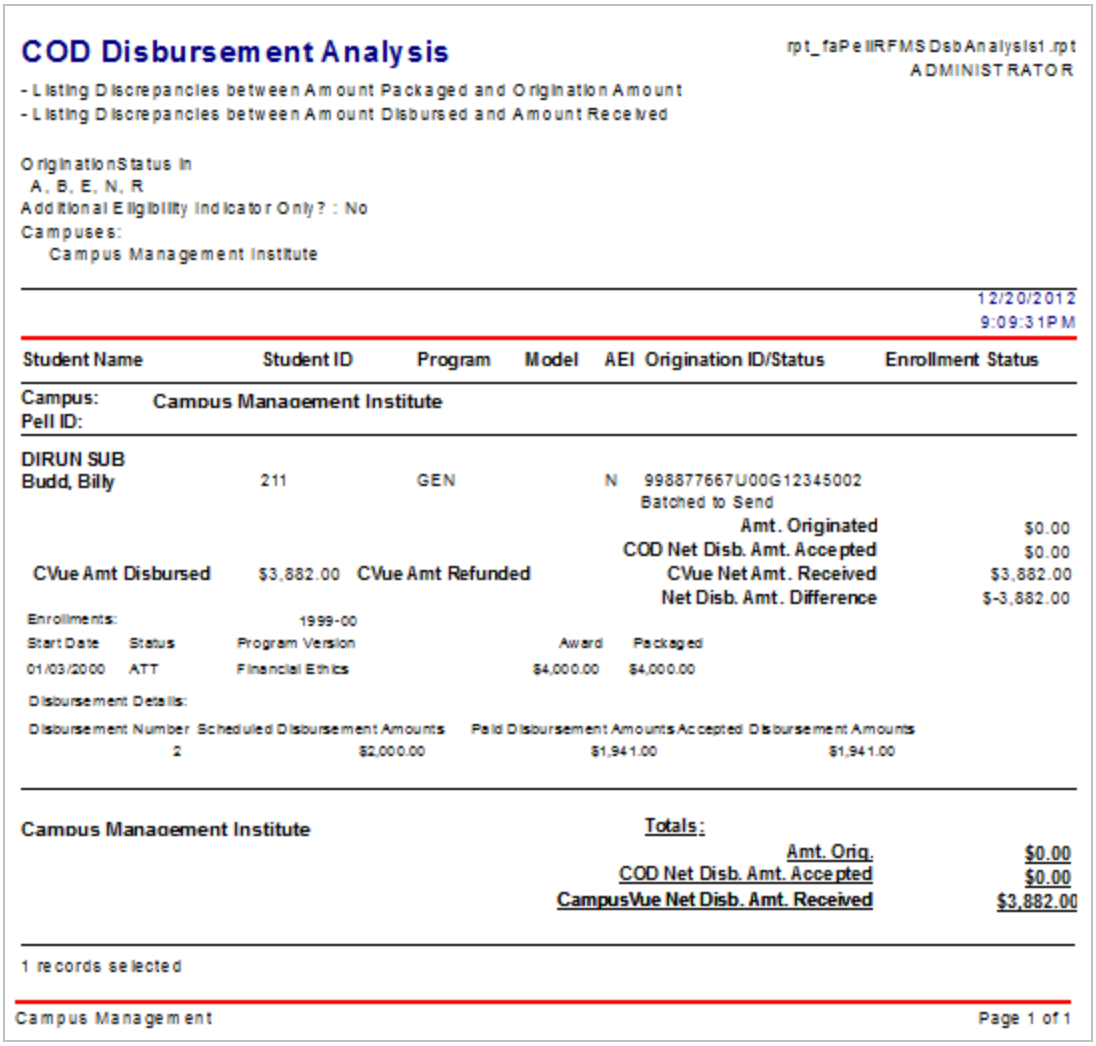
   - Student Name
   - Student ID
   - Program
   - Model
   - AEI (Additional Eligibility Indicator)
   - Origination ID/Status
   - Enrollment Status

   Sub-report details include:

   - Enrollment details (Start Date, Status, Program Version, Award Packaged)
   - Disbursement details (Disbursement Number, Scheduled Disbursement Amounts, Paid Disbursement Amounts, and Accepted Disbursement Amounts)

   The following additional information is provided for each student:

   - Amt. Originated (previously named 'Orig. Amt.')
   - COD Net Disb. Amt. Accepted (previously named 'Disb Accepted')
   - Amt Disbursed
   - Amt Refunded
   - Net Amt. Received (previously named 'Amt. Received')
   - Net Disb. Amt. Difference



COD Disbursement Analysis

rpt_faPellRFMSDsbAnalysis1.rpt
ADMINISTRATOR

- Listing Discrepancies between Amount Packaged and Origination Amount
- Listing Discrepancies between Amount Disbursed and Amount Received

OriginationStatus In
A, B, E, N, R
Additional Eligibility Indicator Only? : No
Campuses:
Campus Management Institute

12/20/2012
9:09:31PM

Student Name	Student ID	Program	Model	AEI	Origination ID/Status	Enrollment Status
Campus: Campus Management Institute						
Pell ID:						
DIRUN SUB						
Budd, Billy	211	GEN		N	998877667U00G12345002	
					Batched to Send	
					Amt. Originated	$0.00
					COD Net Disb. Amt. Accepted	$0.00
CVue Amt Disbursed	$3,882.00	CVue Amt Refunded			CVue Net Amt. Received	$3,882.00
					Net Disb. Amt. Difference	$-3,882.00

Enrollments:

Start Date	Status	Program Version	Award	Packaged
		1999-00		
01/03/2000	ATT	Financial Ethics	$4,000.00	$4,000.00

Disbursement Details:

Disbursement Number	Scheduled Disbursement Amounts	Paid Disbursement Amounts	Accepted Disbursement Amounts
2	$2,000.00	$1,941.00	$1,941.00

Campus Management Institute

Totals:

Amt. Orig.	$0.00
COD Net Disb. Amt. Accepted	$0.00
CampusVue Net Disb. Amt. Received	$3,882.00

1 records selected

Campus Management — Page 1 of 1

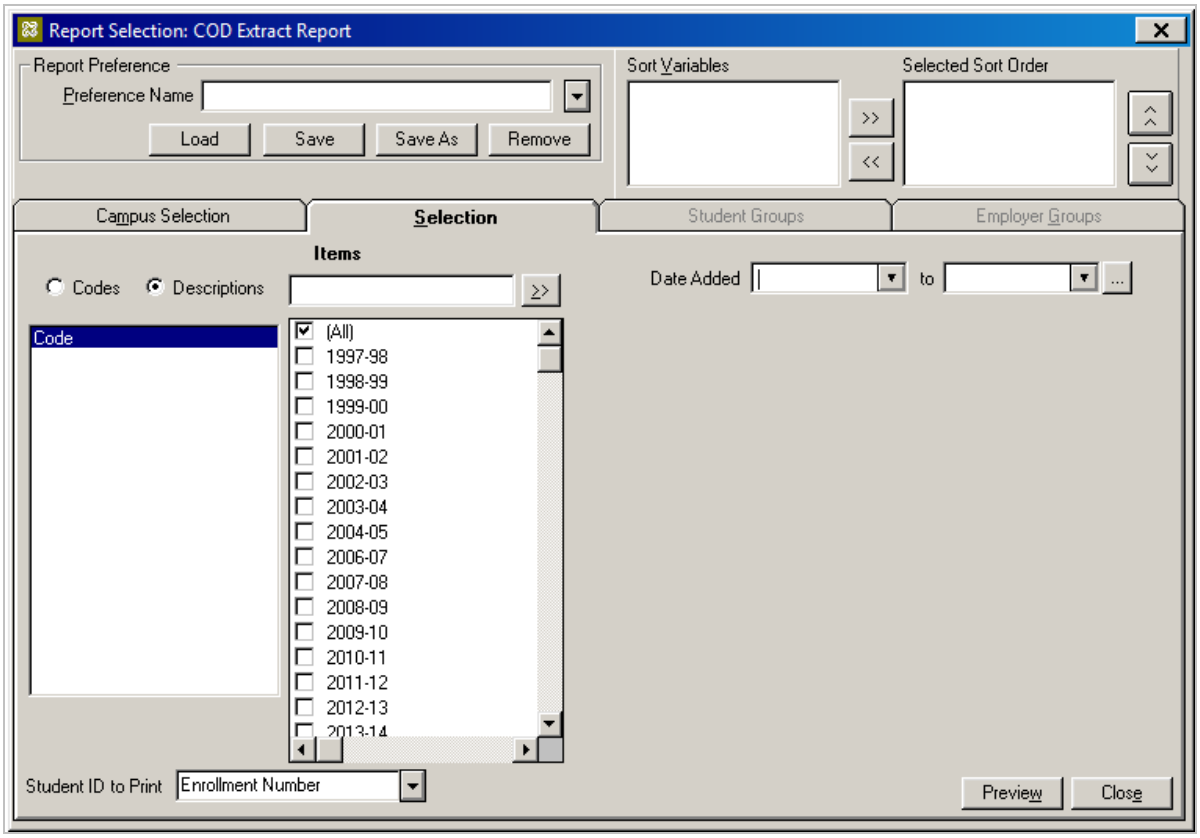
COD Extract Report

This report provides batch details for COD Awards exported out of CampusNexus Student. These awards include ACG, Direct Loans, Pell, and SMART.

To run the report:

1. Navigate to **Reports > Financial Aid > COD Extract Report**. The Report Selection: COD Extract Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Note: The selection criteria include a Date Added range and the Award Year. You can select from a list of award years or select 'Empty'. Empty Award Years are batches that contain multiple Award Years.



4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

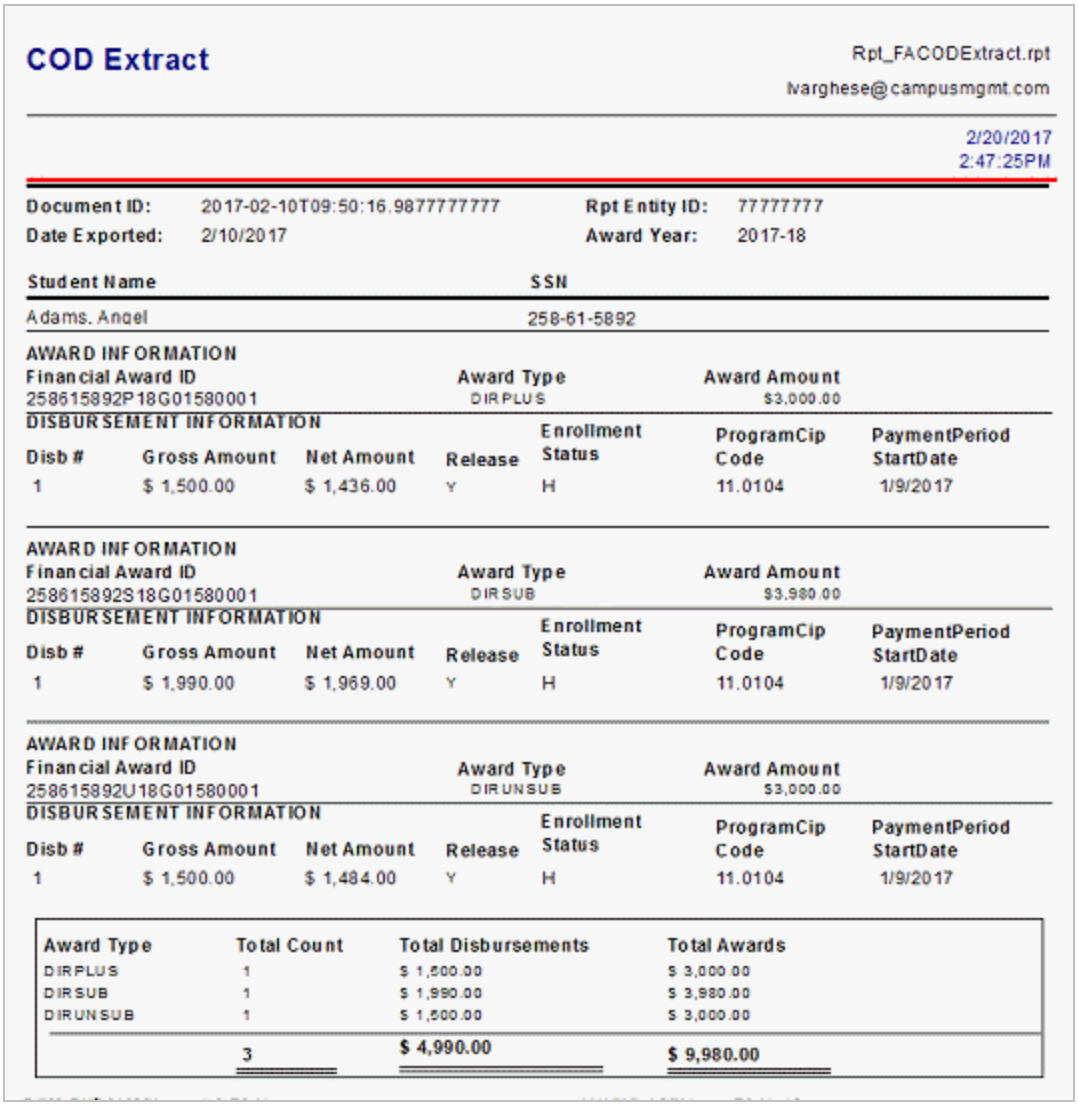
   The report header displays an Award Year or the word 'Multiple'. It also indicates the Document ID, Date Exported, and the Rpt Entity ID.

   The report displays the following details:

   - Student Name
   - SSN
   - Campus

- Financial Award ID #
- Award Type
- Award Amount
- Disbursement #
- Gross Amount
- Net Amount
- Disbursement Released or Not Released

The Award Year column in the detail section is displayed only if the Award Year for the batch (header) is 'Multiple'.



COD Extract

Rpt_FACODExtract.rpt
lvarghese@campusmgmt.com

2/20/2017
2:47:25PM

Document ID: 2017-02-10T09:50:16.9877777777 **Rpt Entity ID:** 77777777
Date Exported: 2/10/2017 **Award Year:** 2017-18

Student Name	SSN
Adams. Angel	258-61-5892

AWARD INFORMATION

Financial Award ID	Award Type	Award Amount
258615892P18G01580001	DIRPLUS	$3,000.00

DISBURSEMENT INFORMATION

Disb #	Gross Amount	Net Amount	Release	Enrollment Status	ProgramCip Code	PaymentPeriod StartDate
1	$ 1,500.00	$ 1,436.00	Y	H	11.0104	1/9/2017

AWARD INFORMATION

Financial Award ID	Award Type	Award Amount
258615892S18G01580001	DIRSUB	$3,980.00

DISBURSEMENT INFORMATION

Disb #	Gross Amount	Net Amount	Release	Enrollment Status	ProgramCip Code	PaymentPeriod StartDate
1	$ 1,990.00	$ 1,969.00	Y	H	11.0104	1/9/2017

AWARD INFORMATION

Financial Award ID	Award Type	Award Amount
258615892U18G01580001	DIRUNSUB	$3,000.00

DISBURSEMENT INFORMATION

Disb #	Gross Amount	Net Amount	Release	Enrollment Status	ProgramCip Code	PaymentPeriod StartDate
1	$ 1,500.00	$ 1,484.00	Y	H	11.0104	1/9/2017

Award Type	Total Count	Total Disbursements	Total Awards
DIRPLUS	1	$ 1,500.00	$ 3,000.00
DIRSUB	1	$ 1,990.00	$ 3,980.00
DIRUNSUB	1	$ 1,500.00	$ 3,000.00
	3	$ 4,990.00	$ 9,980.00

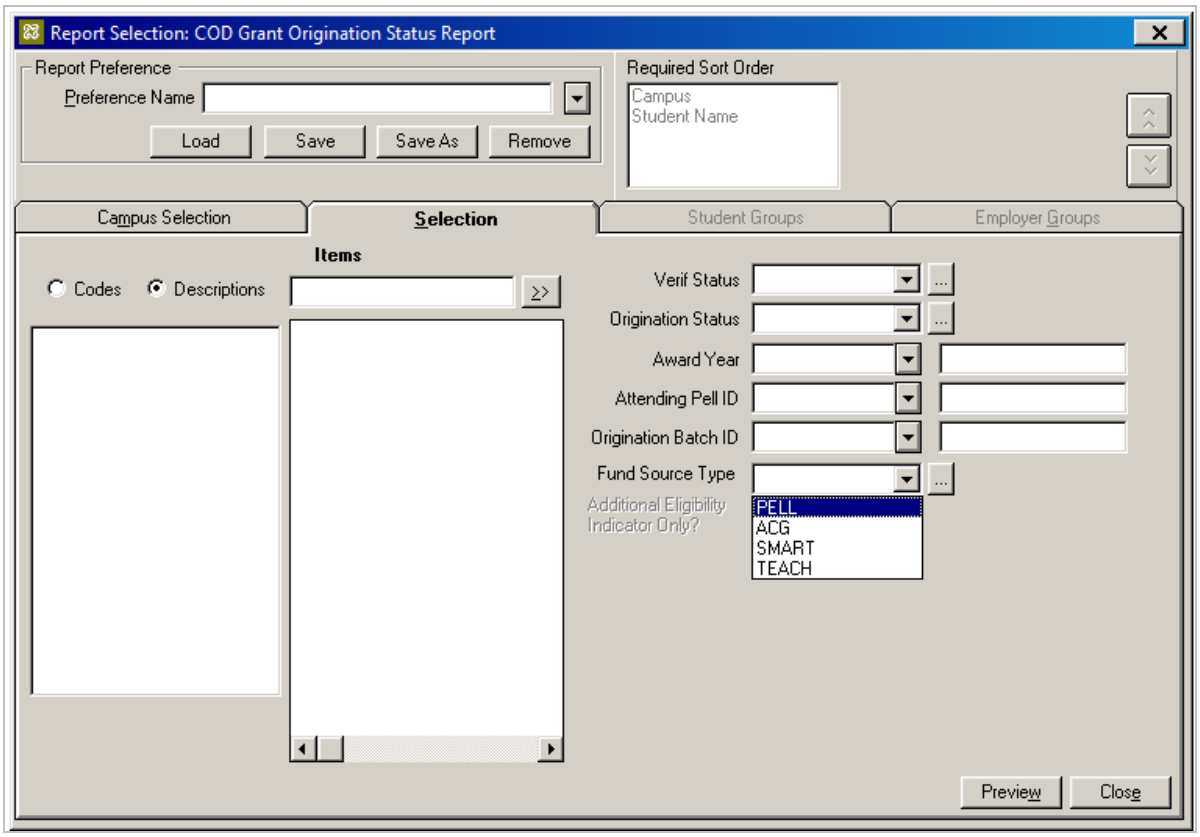
COD Grant Origination Status

This report should be used as an origination tool. It is necessary because a student with no disbursements sent do not appear on the COD Disbursement Analysis report. Only students that have a record for the selected award year are listed on the report (the students are scheduled to receive a COD Grant).

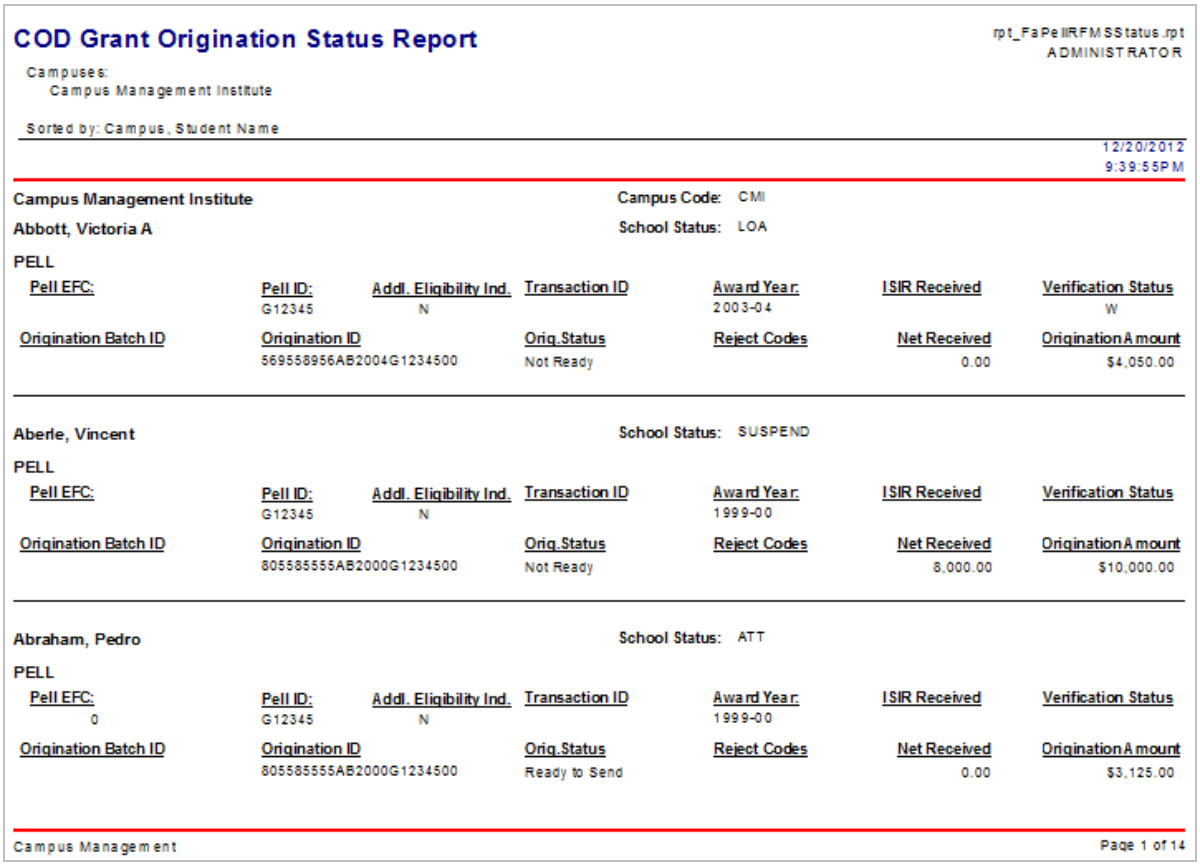
To run the report:

1. Navigate to **Reports > Financial Aid > COD Grant Origination Status Report**. The Report Selection: COD Grant Origination Status Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Note: The Additional Eligibility Indicator Only? check box is disabled by default. This check box becomes enabled for selection when the Fund Source Type is Pell (and any of the other grants), combined with an Award Year equal to or greater than 2009-10.



4. Click **Preview**. The report is assembled and displayed in the Report Viewer.



COD Grant Origination Status Report

rpt_FaPellRFMSStatus.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute

Sorted by: Campus, Student Name

12/20/2012
9:39:55PM

Campus Management Institute — Campus Code: CMI

Abbott, Victoria A — School Status: LOA

PELL

Pell EFC:	Pell ID:	Addl. Eligibility Ind.	Transaction ID	Award Year:	ISIR Received	Verification Status
	G12345	N		2003-04		W

Origination Batch ID	Origination ID	Orig.Status	Reject Codes	Net Received	Origination Amount
	569558956AB2004G1234500	Not Ready		0.00	$4,050.00

Aberle, Vincent — School Status: SUSPEND

PELL

Pell EFC:	Pell ID:	Addl. Eligibility Ind.	Transaction ID	Award Year:	ISIR Received	Verification Status
	G12345	N		1999-00		

Origination Batch ID	Origination ID	Orig.Status	Reject Codes	Net Received	Origination Amount
	805585555AB2000G1234500	Not Ready		8,000.00	$10,000.00

Abraham, Pedro — School Status: ATT

PELL

Pell EFC:	Pell ID:	Addl. Eligibility Ind.	Transaction ID	Award Year:	ISIR Received	Verification Status
0	G12345	N		1999-00		

Origination Batch ID	Origination ID	Orig.Status	Reject Codes	Net Received	Origination Amount
	805585555AB2000G1234500	Ready to Send		0.00	$3,125.00

Campus Management — Page 1 of 14

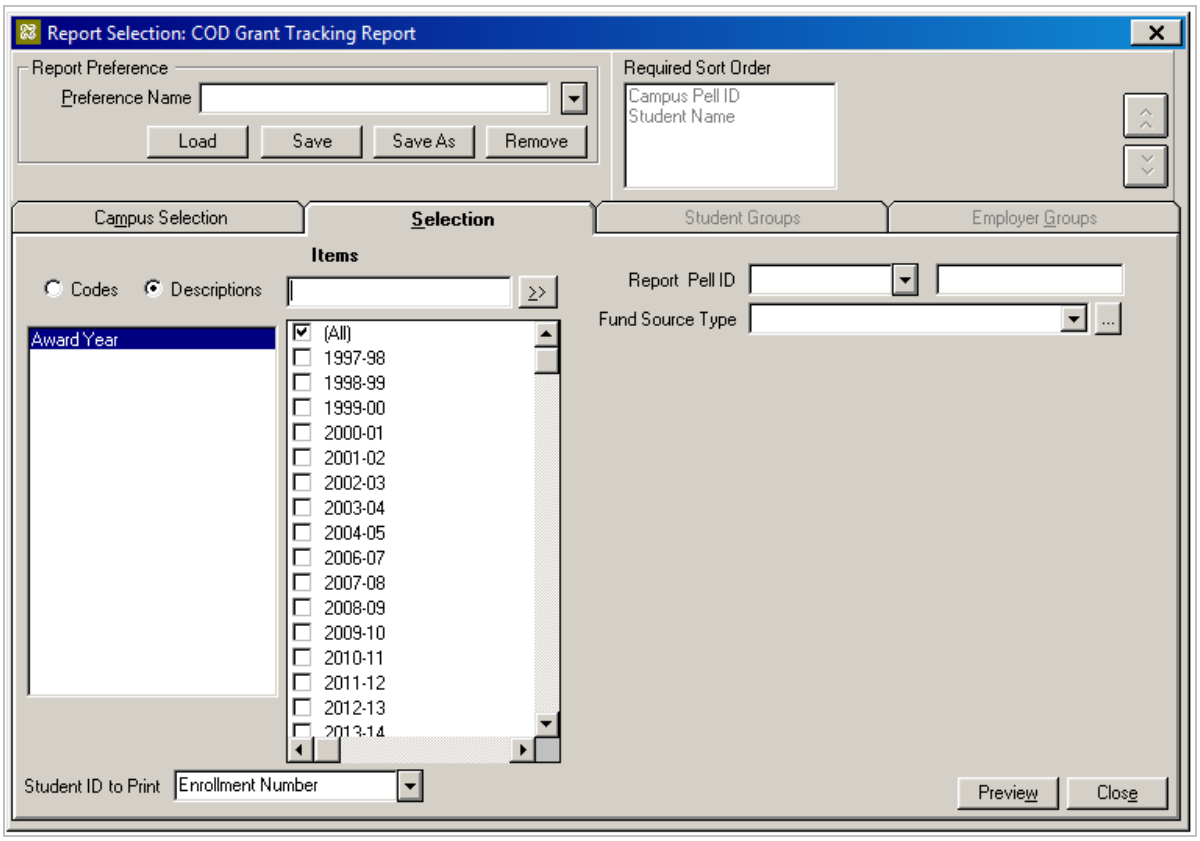
COD Grant Tracking Report

This report summarizes grant amounts for the specified award year and lists detailed disbursement and refund information. Totals are included at the bottom of each report showing counts of unduplicated students. The report is sorted by Campus Pell ID and Student Name.

To run the report:

1. Navigate to **Reports > Financial Aid > COD Grant Tracking Report**. The Report Selection: COD Grant Tracking Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Note: The selection criteria include a the Report Pell ID range, Fund Source Type, and Award Year. You can select from a list of award years or select Empty. Empty award years are batches that contain multiple award years.



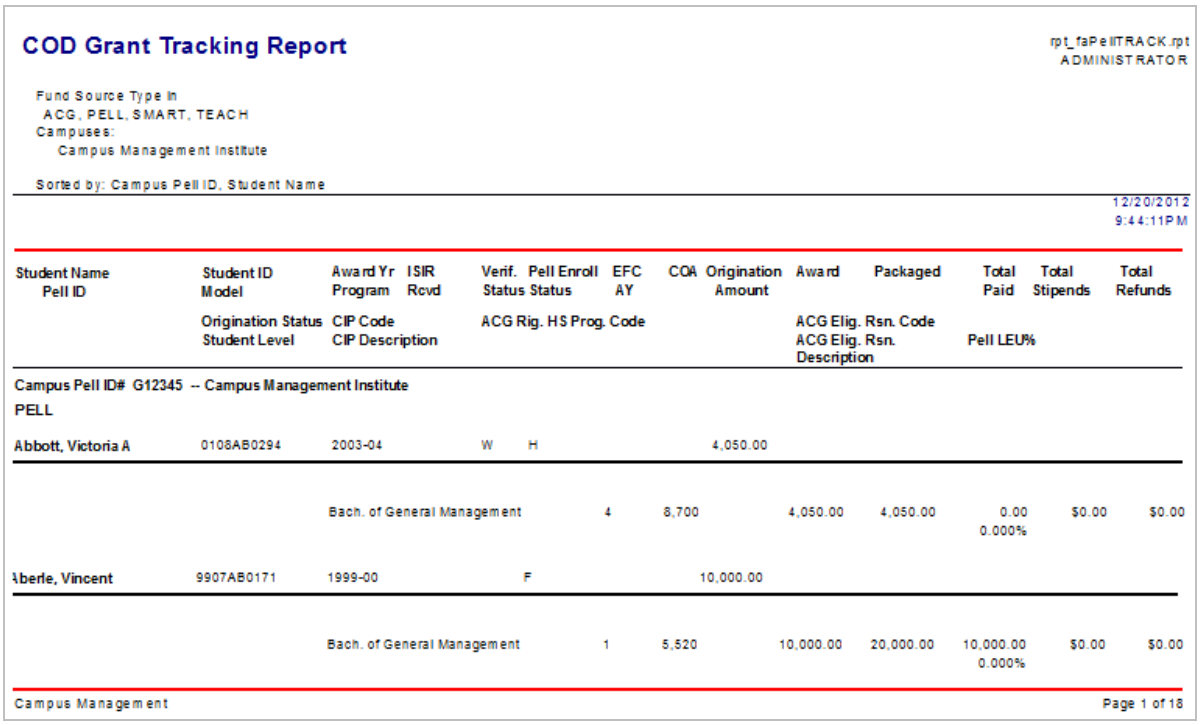
4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The detail lines on the report are specific to the fund source type selected.

   The report displays the following details:

   - Total of all eligible COD grant amounts
   - Total amount awarded and packaged
   - Total of all amounts disbursed

- Total of all amounts refunded
- Pell LEU% (Pell Lifetime Eligibility Used)
- Count of students to whom COD grants were disbursed



COD Grant Tracking Report

rpt_faPellTRACK.rpt
ADMINISTRATOR

Fund Source Type In
ACG, PELL, SMART, TEACH
Campuses:
Campus Management Institute

Sorted by: Campus Pell ID, Student Name

12/20/2012
9:44:11PM

Student Name / Pell ID	Student ID / Model	Award Yr / Program	ISIR Rcvd	Verif. Status	Pell Enroll Status	EFC / AY	COA	Origination Amount	Award	Packaged	Total Paid	Total Stipends	Total Refunds
	Origination Status / Student Level	CIP Code / CIP Description		ACG	Rig. HS Prog. Code				ACG Elig. Rsn. Code / ACG Elig. Rsn. Description		Pell LEU%		
Campus Pell ID# G12345 -- Campus Management Institute													
PELL													
Abbott, Victoria A	0108AB0294	2003-04		W	H			4,050.00					
		Bach. of General Management				4	8,700		4,050.00	4,050.00	0.00 0.000%	$0.00	$0.00
Aberle, Vincent	9907AB0171	1999-00			F			10,000.00					
		Bach. of General Management				1	5,520		10,000.00	20,000.00	10,000.00 0.000%	$0.00	$0.00

Campus Management

Page 1 of 18

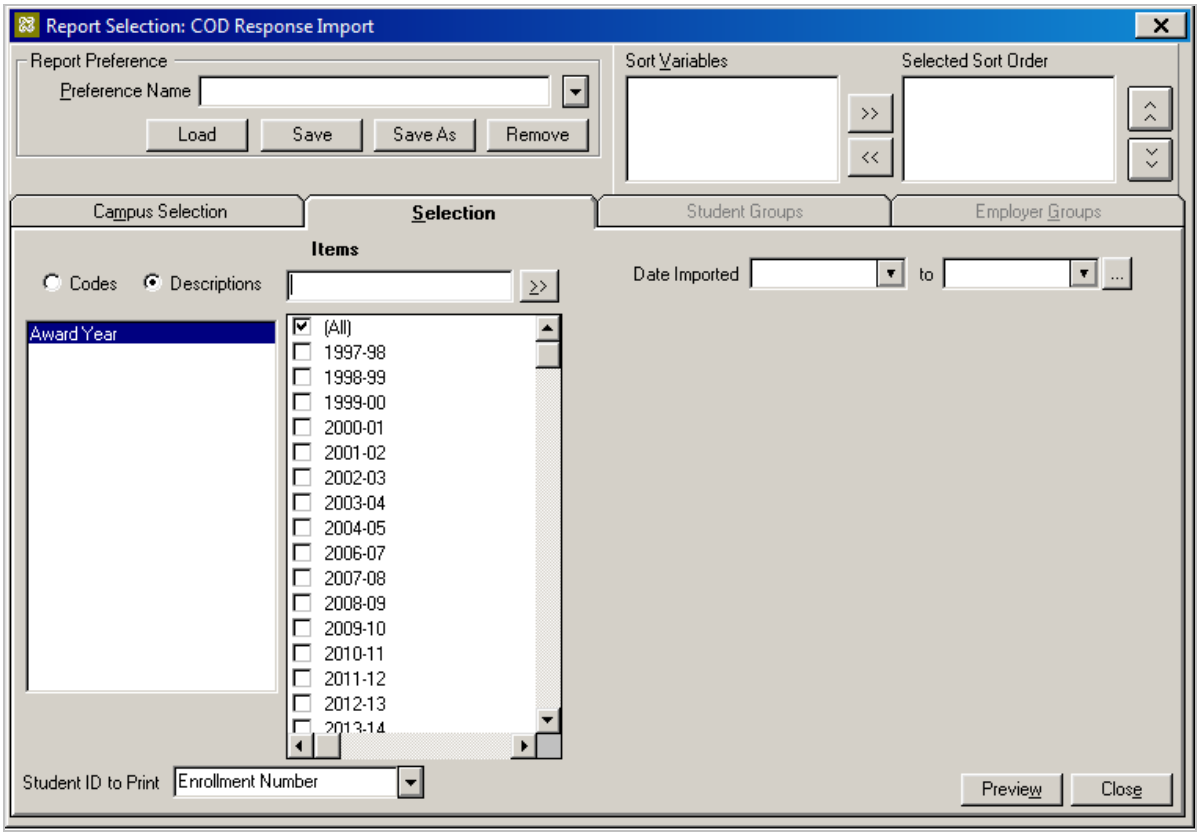
COD Response Import

This report provides batch details for COD Awards imported to CampusNexus Student. These awards include ACG, Direct Loans, Pell, and SMART.

To run the report:

1. Navigate to **Reports > Financial Aid > COD Response Import**. The Report Selection: COD Response Import form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Note: The selection criteria include a Date Imported range and Award Year. You can select from a list of award years or select Empty. Empty award years are batches that contain multiple award years.



4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

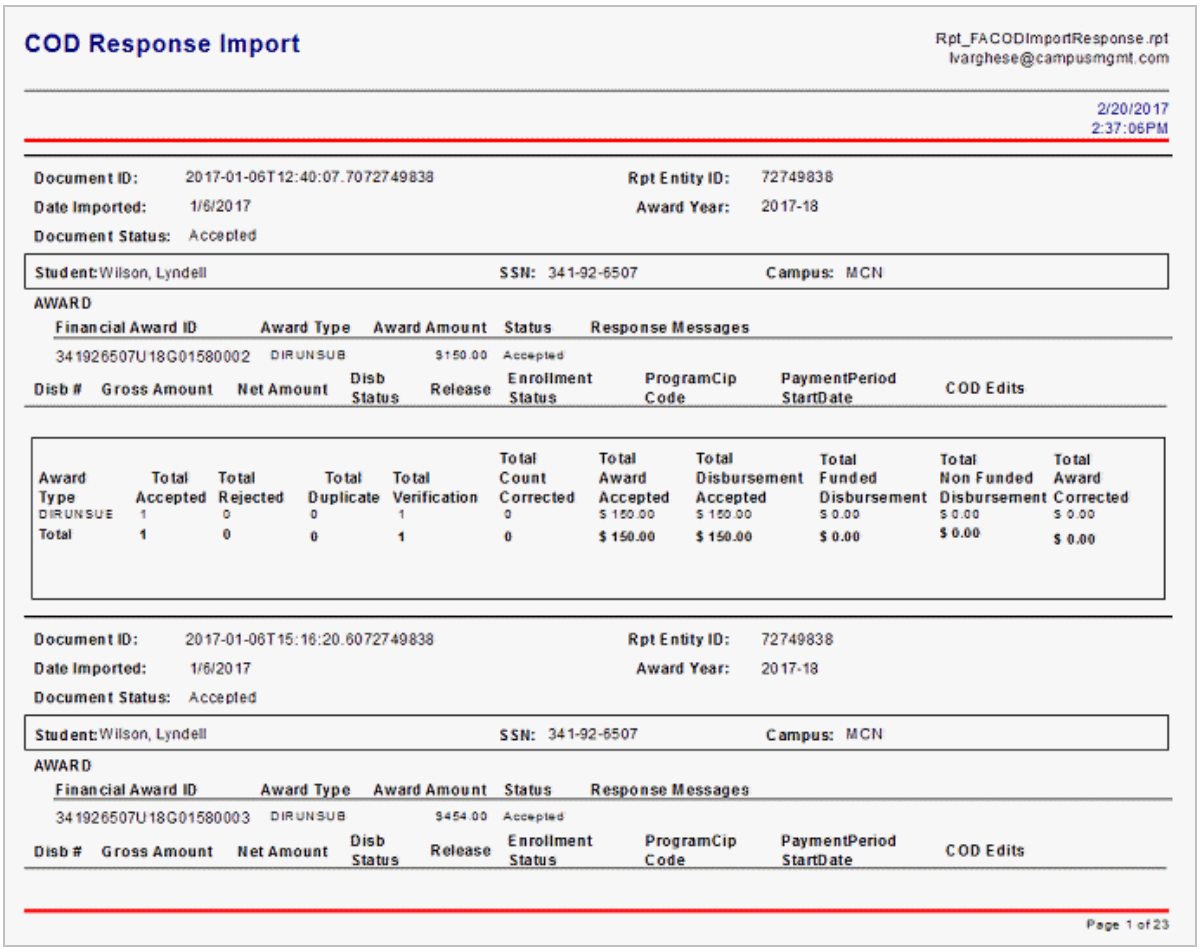
   The header of the report output shows an Award Year or the word 'Multiple'. It also shows the Document ID, Date Exported, and the Report Entity ID.

   The Award Year column in the detail section is displayed only if the Award Year for the batch (header) is 'Multiple'.

   The report displays the following details:

   - Student Name
   - SSN

- Campus
- Financial Award ID
- Award Type
- Award Amount
- Disbursement #
- Gross Amount
- Net Amount
- Description of COD edit (comment) codes
- Disbursement Released or Not Released.



COD Response Import

Rpt_FACODImportResponse.rpt
lvarghese@campusmgmt.com

2/20/2017
2:37:06PM

Document ID: 2017-01-06T12:40:07.7072749838 Rpt Entity ID: 72749838
Date Imported: 1/6/2017 Award Year: 2017-18
Document Status: Accepted

Student: Wilson, Lyndell SSN: 341-92-6507 Campus: MCN

AWARD

Financial Award ID	Award Type	Award Amount	Status	Response Messages
341926507U18G01580002	DIRUNSUB	$150.00	Accepted	

Disb #	Gross Amount	Net Amount	Disb Status	Release	Enrollment Status	ProgramCip Code	PaymentPeriod StartDate	COD Edits

Award Type	Total Accepted	Total Rejected	Total Duplicate	Total Verification	Total Count Corrected	Total Award Accepted	Total Disbursement Accepted	Total Funded Disbursement	Total Non Funded Disbursement	Total Award Corrected
DIRUNSUE	1	0	0	1	0	$ 150.00	$ 150.00	$ 0.00	$ 0.00	$ 0.00
Total	1	0	0	1	0	$ 150.00	$ 150.00	$ 0.00	$ 0.00	$ 0.00

Document ID: 2017-01-06T15:16:20.6072749838 Rpt Entity ID: 72749838
Date Imported: 1/6/2017 Award Year: 2017-18
Document Status: Accepted

Student: Wilson, Lyndell SSN: 341-92-6507 Campus: MCN

AWARD

Financial Award ID	Award Type	Award Amount	Status	Response Messages
341926507U18G01580003	DIRUNSUB	$454.00	Accepted	

Disb #	Gross Amount	Net Amount	Disb Status	Release	Enrollment Status	ProgramCip Code	PaymentPeriod StartDate	COD Edits

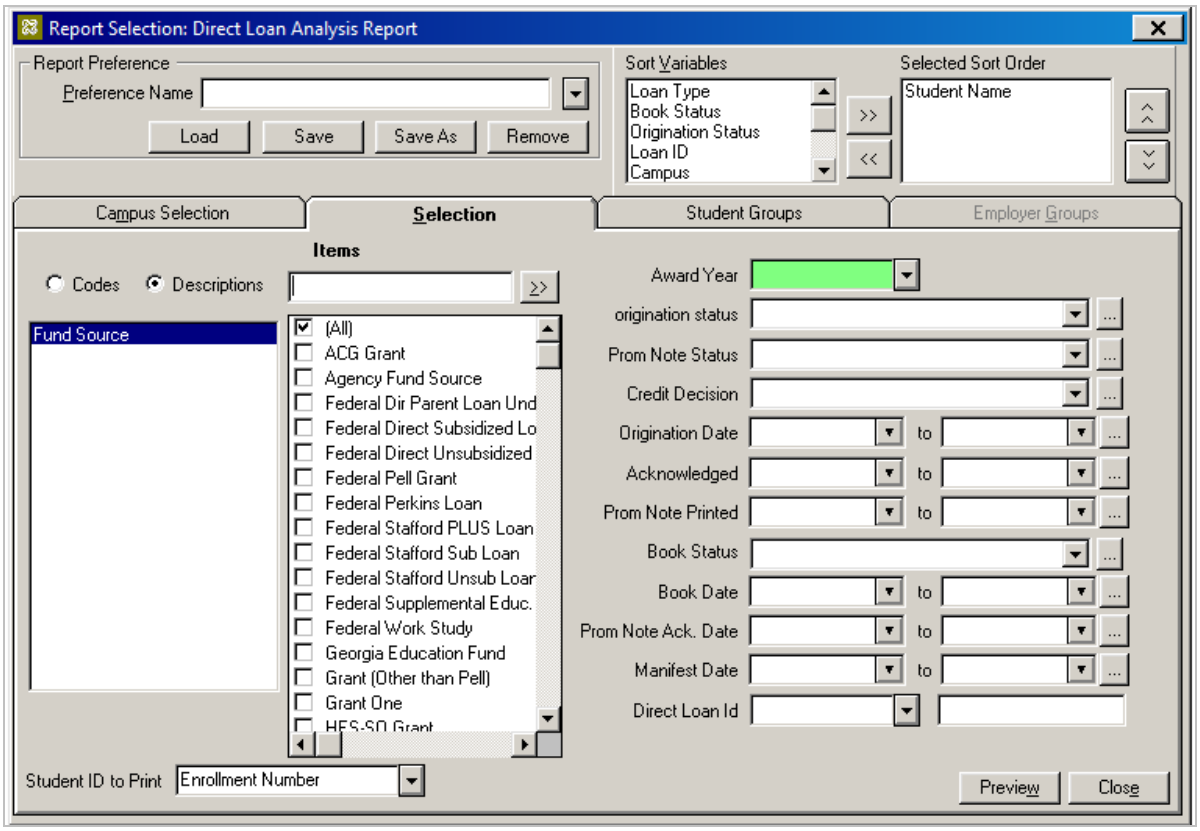
Page 1 of 23

Direct Loan Analysis Report

This report provides a detailed analysis of the direct loan activity at your institution. It also includes a summary page of statistics about your institution's direct loans.

To run the report:

1. Navigate to **Reports > Financial Aid > Direct Loan Analysis Report**. The Report Selection: Direct Loan Analysis Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

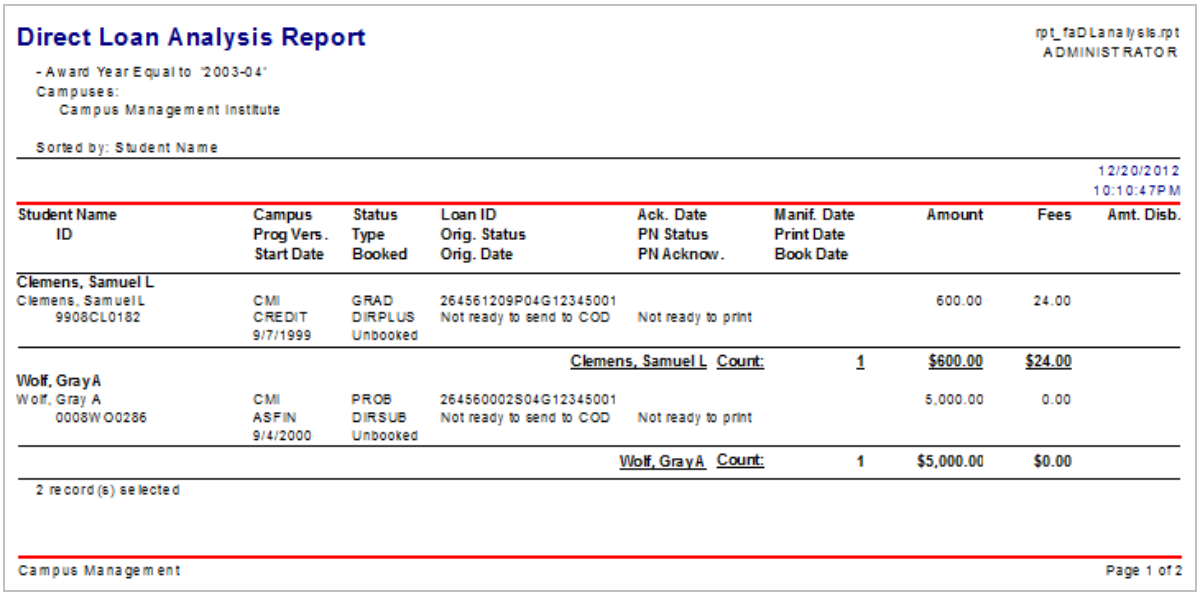
   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Student ID
   - Campus
   - Program Version
   - Start Date
   - Student Status in school

- Loan Type
- Booked Status
- Loan ID
- Origination Status
- Origination Date
- Acknowledgement Date
- Prom Note Status
- Prom Note Acknowledgement Status
- Manifest Date
- Prom Note Printed Date
- Book Date
- Amount of Loan
- Loan Fee Amount
- Amount Disbursed



Direct Loan Analysis Report

rpt_faDLanalysis.rpt
ADMINISTRATOR

- Award Year Equal to '2003-04'
Campuses:
Campus Management Institute

Sorted by: Student Name

12/20/2012
10:10:47PM

Student Name / ID	Campus / Prog Vers. / Start Date	Status / Type / Booked	Loan ID / Orig. Status / Orig. Date	Ack. Date / PN Status / PN Acknow.	Manif. Date / Print Date / Book Date	Amount	Fees	Amt. Disb.
Clemens, Samuel L								
Clemens, Samuel L 9908CL0182	CMI CREDIT 9/7/1999	GRAD DIRPLUS Unbooked	264561209P04G12345001 Not ready to send to COD	 Not ready to print		600.00	24.00	
			Clemens, Samuel L Count:		1	$600.00	$24.00	
Wolf, Gray A								
Wolf, Gray A 0008WO0286	CMI ASFIN 9/4/2000	PROB DIRSUB Unbooked	264560002S04G12345001 Not ready to send to COD	 Not ready to print		5,000.00	0.00	
			Wolf, Gray A Count:		1	$5,000.00	$0.00	

2 record(s) selected

Campus Management Page 1 of 2

For each loan type, the Totals Page includes totals for number of students, total loan amount, total loan amount booked, and total amount disbursed.

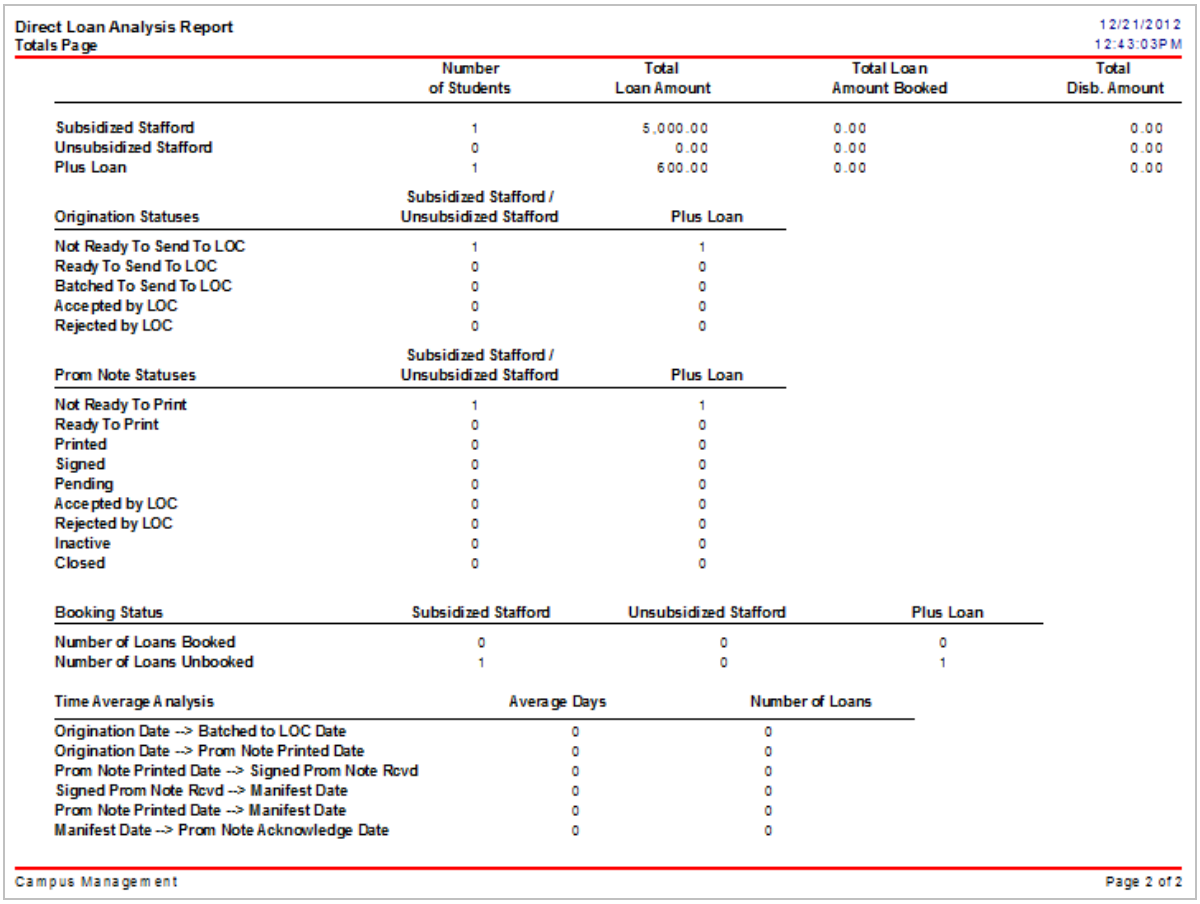
A summary table of origination statuses displays the number of subsidized and unsubsidized Stafford loans and PLUS loans.

A table of Prom Note statuses displays the number of subsidized and unsubsidized Stafford loans and PLUS loans.

Another summary table lists the number of booked and unbooked subsidized, unsubsidized, and PLUS loans.

A time average analysis table shows the average days and number of loans for six milestones in direct loan processing:

- From Origination Date to Batched to COD Date
- From Origination Date to Prom Note Printed Date
- From Prom Note Printed Date to Signed Prom Note Received
- From Signed Prom Note Received to Manifest Date
- From Prom Note Printed Date to Manifest Date
- From Manifest Date to Prom Note Acknowledged Date



Direct Loan Analysis Report
Totals Page

12/21/2012
12:43:03PM

	Number of Students	Total Loan Amount	Total Loan Amount Booked	Total Disb. Amount
Subsidized Stafford	1	5,000.00	0.00	0.00
Unsubsidized Stafford	0	0.00	0.00	0.00
Plus Loan	1	600.00	0.00	0.00

Origination Statuses	Subsidized Stafford / Unsubsidized Stafford	Plus Loan
Not Ready To Send To LOC	1	1
Ready To Send To LOC	0	0
Batched To Send To LOC	0	0
Accepted by LOC	0	0
Rejected by LOC	0	0

Prom Note Statuses	Subsidized Stafford / Unsubsidized Stafford	Plus Loan
Not Ready To Print	1	1
Ready To Print	0	0
Printed	0	0
Signed	0	0
Pending	0	0
Accepted by LOC	0	0
Rejected by LOC	0	0
Inactive	0	0
Closed	0	0

Booking Status	Subsidized Stafford	Unsubsidized Stafford	Plus Loan
Number of Loans Booked	0	0	0
Number of Loans Unbooked	1	0	1

Time Average Analysis	Average Days	Number of Loans
Origination Date --> Batched to LOC Date	0	0
Origination Date --> Prom Note Printed Date	0	0
Prom Note Printed Date --> Signed Prom Note Rcvd	0	0
Signed Prom Note Rcvd --> Manifest Date	0	0
Prom Note Printed Date --> Manifest Date	0	0
Manifest Date --> Prom Note Acknowledge Date	0	0

Campus Management

Page 2 of 2

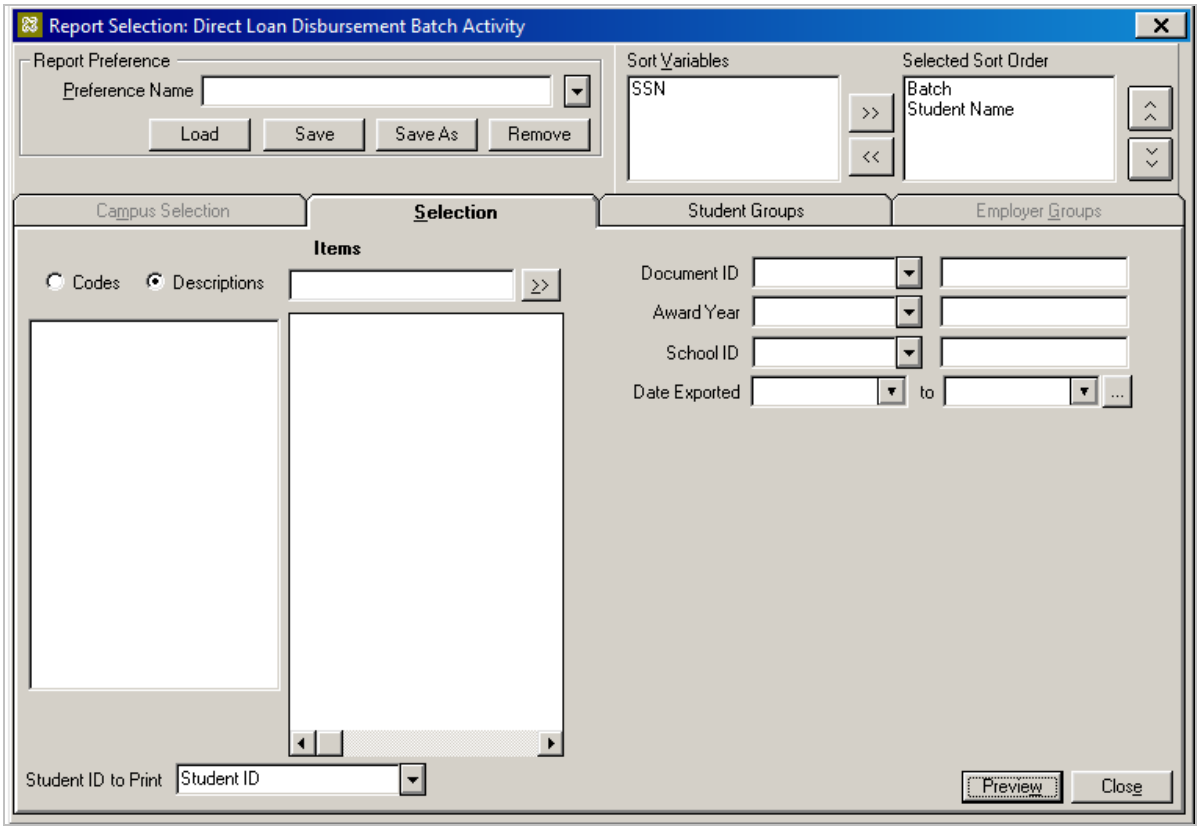
Direct Loan Disbursement Batch Activity

This report provides information about direct loan batch activity for phase-in participant batches and full participant batches. The data selection is based on the Award Year, School ID (six-digit direct loan school ID), and a date range for which to include batches. The date the batch was created is compared with the date range entered.

The report selects all rows from the FA Batch Export/Import table where the type is direct loan and the report selection criteria are met. In addition, the program evaluates the File Type #H in the FA Batch Export/Import table.

To run the report:

1. Navigate to **Reports > Financial Aid > Direct Loan Disbursement Batch Activity**. The Report Selection: Direct Loan Disbursement Batch Activity form is displayed.
2. Select appropriate options on the Selection tab.



3. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The reports list summary information about the loan disbursement batch activity. The report displays the following details:

   - Student Name
   - Campus
   - Model

- Loan ID
- Loan Amount
- Disbursement Number
- Sequence Number
- Disbursement Type
- Disbursement Amount
- Status

The detail records in the batch are listed on the report or included as a drill down.

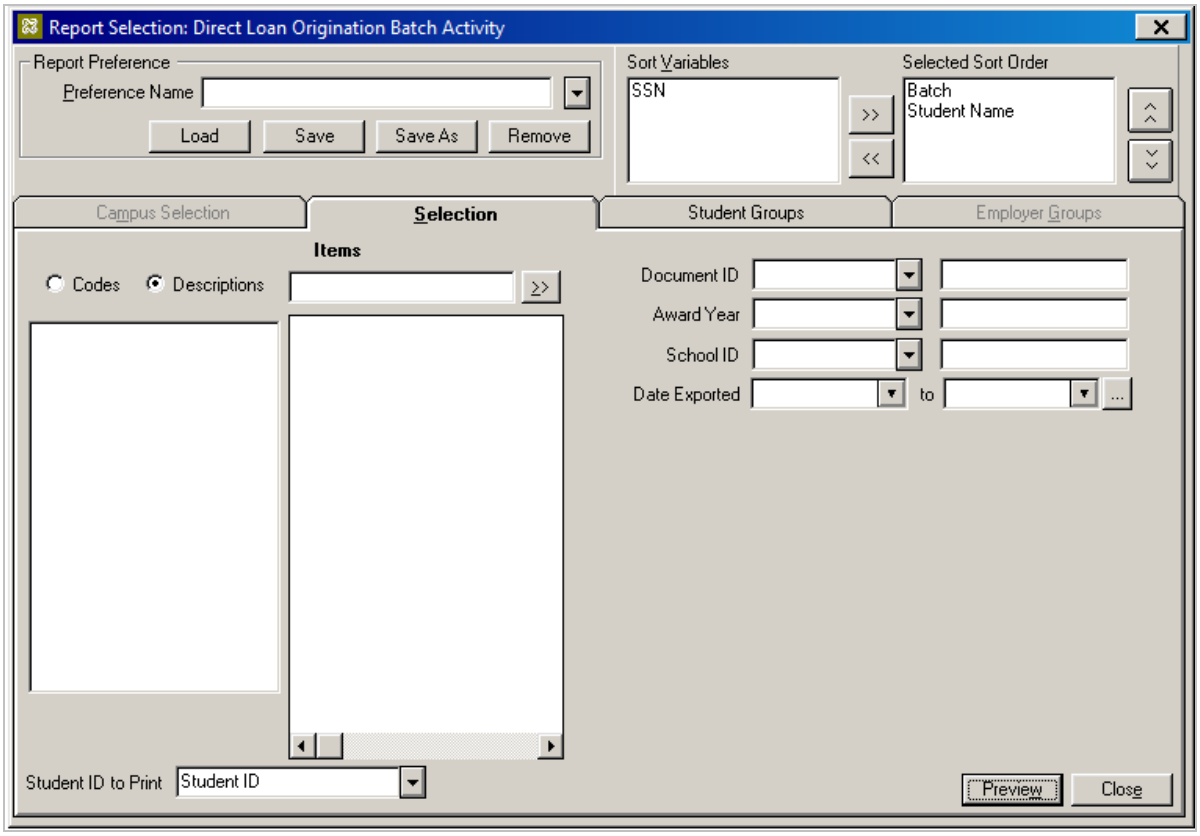
Direct Loan Origination Batch Activity

This report provides information about direct loan batch activity for phase-in participant batches and full participant batches. The data selection is based on the Award Year, School ID (six-digit direct loan school ID), and a date range for which to include batches. The date the batch was created is compared with the date range entered.

The report selects all rows from the FA Batch Export/Import table where the type is direct loan and the report selection criteria are met. In addition, the program evaluates the File Types PF or #D in the FA Batch Export/Import table.

To run the report:

1. Navigate to **Reports > Financial Aid > Direct Loan Origination Batch Activity**. The Report Selection: Direct Loan Origination Batch Activity form is displayed.
2. Select appropriate options on the Selection tab.



3. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

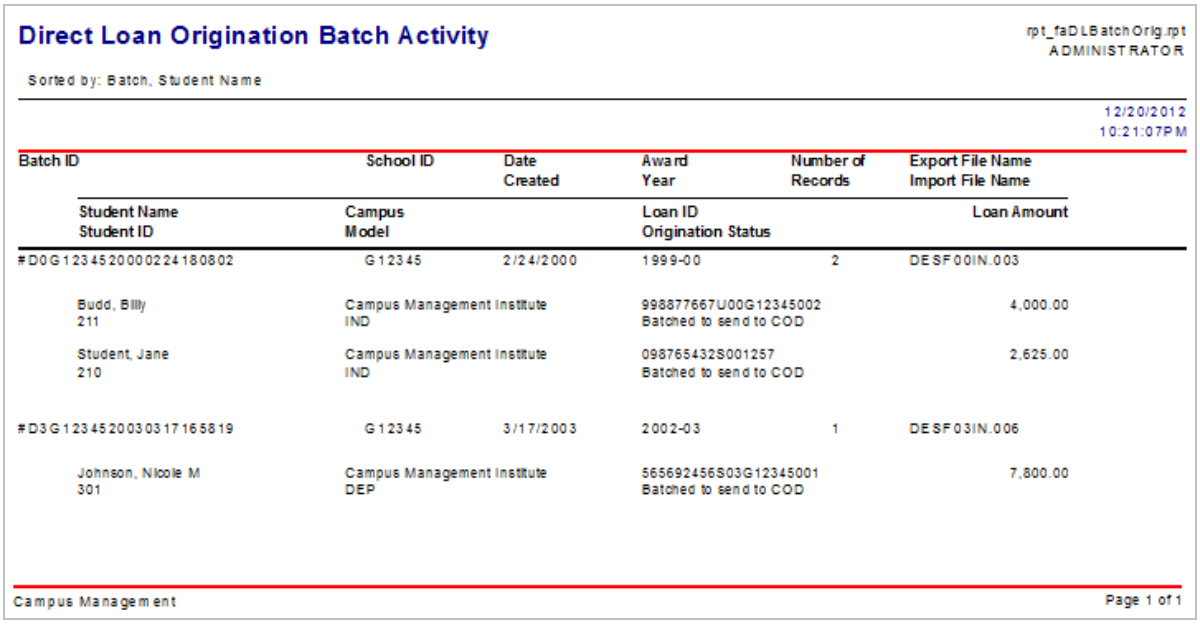
4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The reports list summary information about the loan origination batch activity. The report displays the following details:

   - Student Name
   - Campus
   - Model

- Loan ID
- Origination Status
- Loan Amount

- The detail records in the batch are listed on the report or included as a drill down.



Direct Loan Origination Batch Activity

rpt_faDLBatchOrig.rpt
ADMINISTRATOR

Sorted by: Batch, Student Name

12/20/2012
10:21:07PM

Batch ID	School ID	Date Created	Award Year	Number of Records	Export File Name / Import File Name
Student Name / Student ID	Campus / Model		Loan ID / Origination Status		Loan Amount
#D0G12345200022418080 2	G12345	2/24/2000	1999-00	2	DESF00IN.003
Budd, Billy 211	Campus Management Institute IND		998877667U00G12345002 Batched to send to COD		4,000.00
Student, Jane 210	Campus Management Institute IND		09876543 2S001257 Batched to send to COD		2,625.00
#D3G12345200303171658 19	G12345	3/17/2003	2002-03	1	DESF03IN.006
Johnson, Nicole M 301	Campus Management Institute DEP		565692456S03G12345001 Batched to send to COD		7,800.00

Campus Management

Page 1 of 1

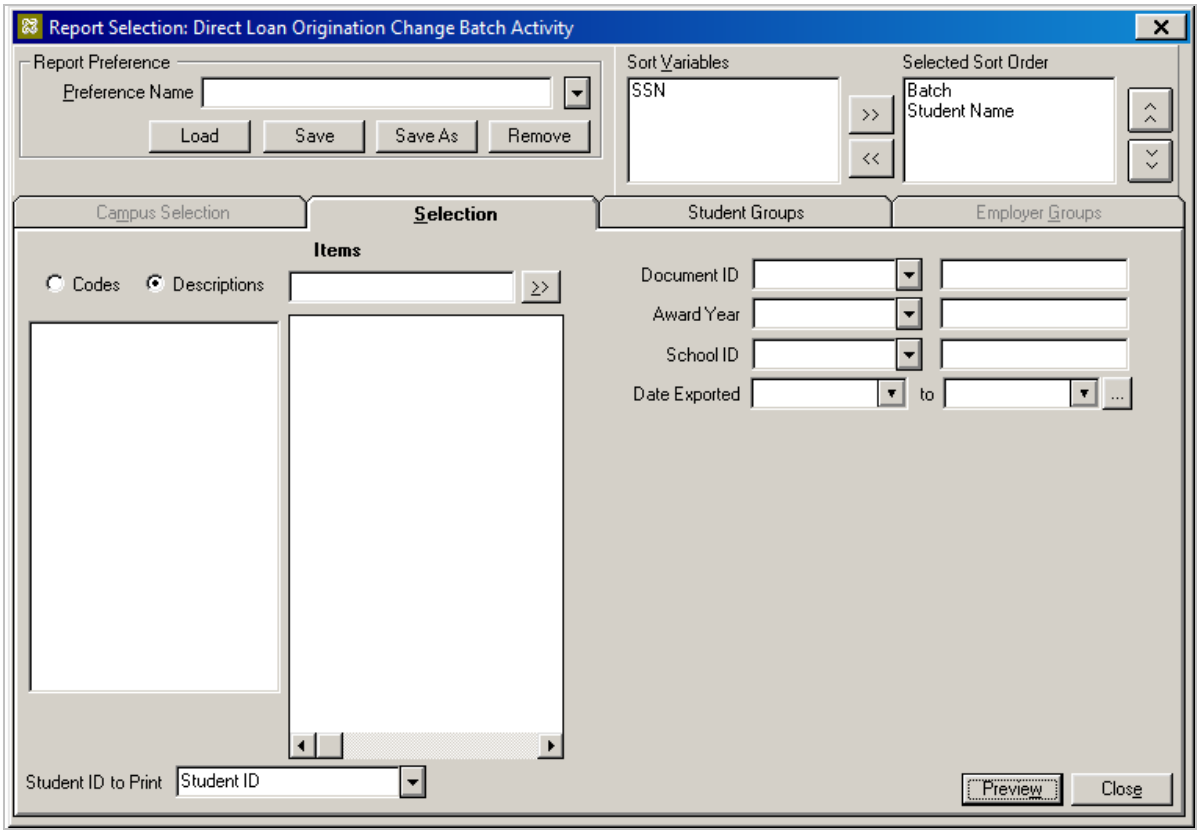
Direct Loan Origination Change Batch Activity

This report provides information about direct loan batch activity for phase-in participant batches and full participant batches. The data selection is based on the Award Year, School ID (six-digit direct loan school ID), and a date range for which to include batches. The date the batch was created is compared with the date range entered.

The report selects all rows from the FA Batch Export/Import table where the type is direct loan and the report selection criteria are met. In addition, the program evaluates the File Type #E in the FA Batch Export/Import table.

To run the report:

1. Navigate to **Reports > Financial Aid > Direct Loan Origination Change Batch Activity**. The Report Selection: Direct Loan Origination Change Batch Activity form is displayed.
2. Select appropriate options on the Selection tab.



3. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The reports list summary information about the loan origination change batch activity. The report displays the following details: :

   - Student Name
   - Campus
   - Model

- Loan ID
- Loan Amount
- Field Changed
- New Field Value
- Status: PENDING, ACCEPTED, or REJECTED

The detail records in the batch are listed on the report or included as a drill down.

Disbursement Batches Not Reconciled

This report includes details about posted batches where the amount posted is not reconciled, for example when posted dollars plus returned dollars are unequal to the total amount for the batch.

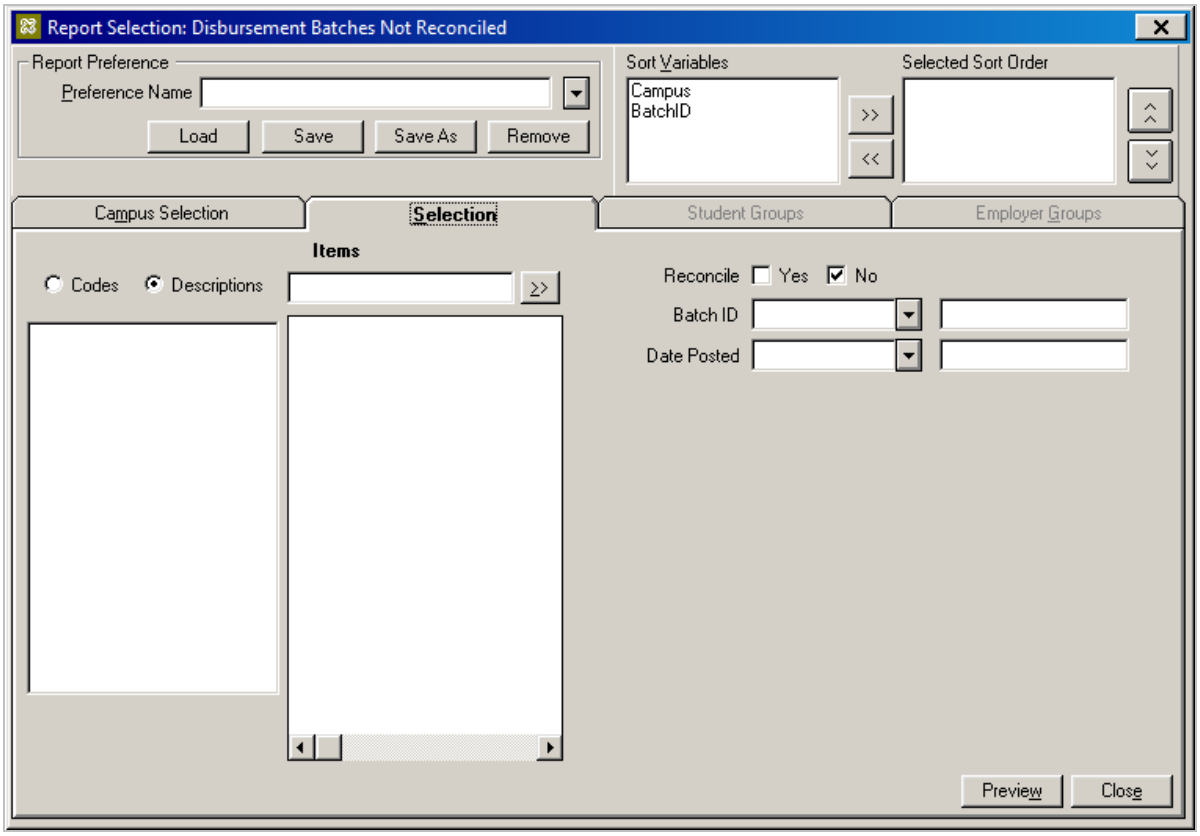
The report enables you to:

- Determine that a deposit associated with a disbursement batch is required before the batch can auto-post.
- Determine that a disbursement batch has a deposit associated with it.

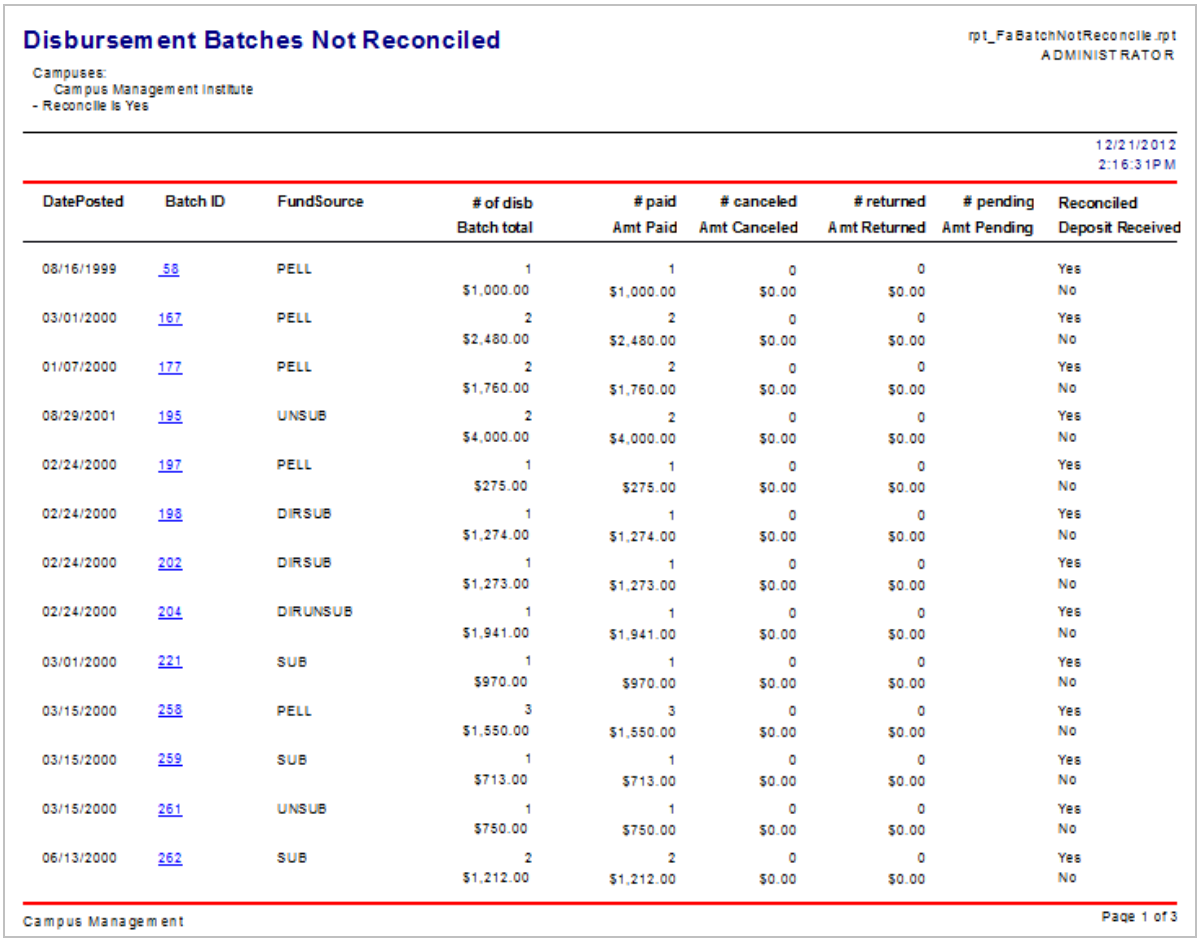
To run the report:

Note: This report may also be run by clicking **View Report** in the Deposit Tracking and Reconciliation User Interface.

1. Navigate to **Reports > Financial Aid > Disbursement Batches Not Reconciled**. The Report Selection: Disbursement Batches Not Reconciled form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. Select appropriate options on the Selection tab.



Disbursement Batches Not Reconciled

rpt_FaBatchNotReconcile.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- Reconcile Is Yes

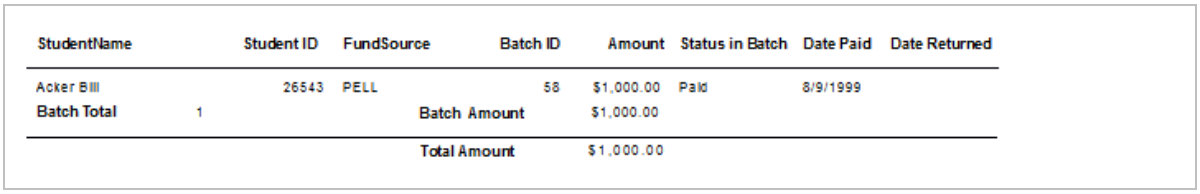
12/21/2012
2:16:31PM

DatePosted	Batch ID	FundSource	# of disb Batch total	# paid Amt Paid	# canceled Amt Canceled	# returned Amt Returned	# pending Amt Pending	Reconciled Deposit Received
08/16/1999	58	PELL	1 $1,000.00	1 $1,000.00	0 $0.00	0 $0.00		Yes No
03/01/2000	167	PELL	2 $2,480.00	2 $2,480.00	0 $0.00	0 $0.00		Yes No
01/07/2000	177	PELL	2 $1,760.00	2 $1,760.00	0 $0.00	0 $0.00		Yes No
08/29/2001	195	UNSUB	2 $4,000.00	2 $4,000.00	0 $0.00	0 $0.00		Yes No
02/24/2000	197	PELL	1 $275.00	1 $275.00	0 $0.00	0 $0.00		Yes No
02/24/2000	198	DIRSUB	1 $1,274.00	1 $1,274.00	0 $0.00	0 $0.00		Yes No
02/24/2000	202	DIRSUB	1 $1,273.00	1 $1,273.00	0 $0.00	0 $0.00		Yes No
02/24/2000	204	DIRUNSUB	1 $1,941.00	1 $1,941.00	0 $0.00	0 $0.00		Yes No
03/01/2000	221	SUB	1 $970.00	1 $970.00	0 $0.00	0 $0.00		Yes No
03/15/2000	258	PELL	3 $1,550.00	3 $1,550.00	0 $0.00	0 $0.00		Yes No
03/15/2000	259	SUB	1 $713.00	1 $713.00	0 $0.00	0 $0.00		Yes No
03/15/2000	261	UNSUB	1 $750.00	1 $750.00	0 $0.00	0 $0.00		Yes No
06/13/2000	262	SUB	2 $1,212.00	2 $1,212.00	0 $0.00	0 $0.00		Yes No

Campus Management

Page 1 of 3

When you click on a Batch ID, a detail report is provided of all transactions in the selected batch.



StudentName	Student ID	FundSource	Batch ID	Amount	Status in Batch	Date Paid	Date Returned
Acker Bill	26543	PELL	58	$1,000.00	Paid	8/9/1999	
Batch Total	1		**Batch Amount**	$1,000.00			
			Total Amount	$1,000.00			

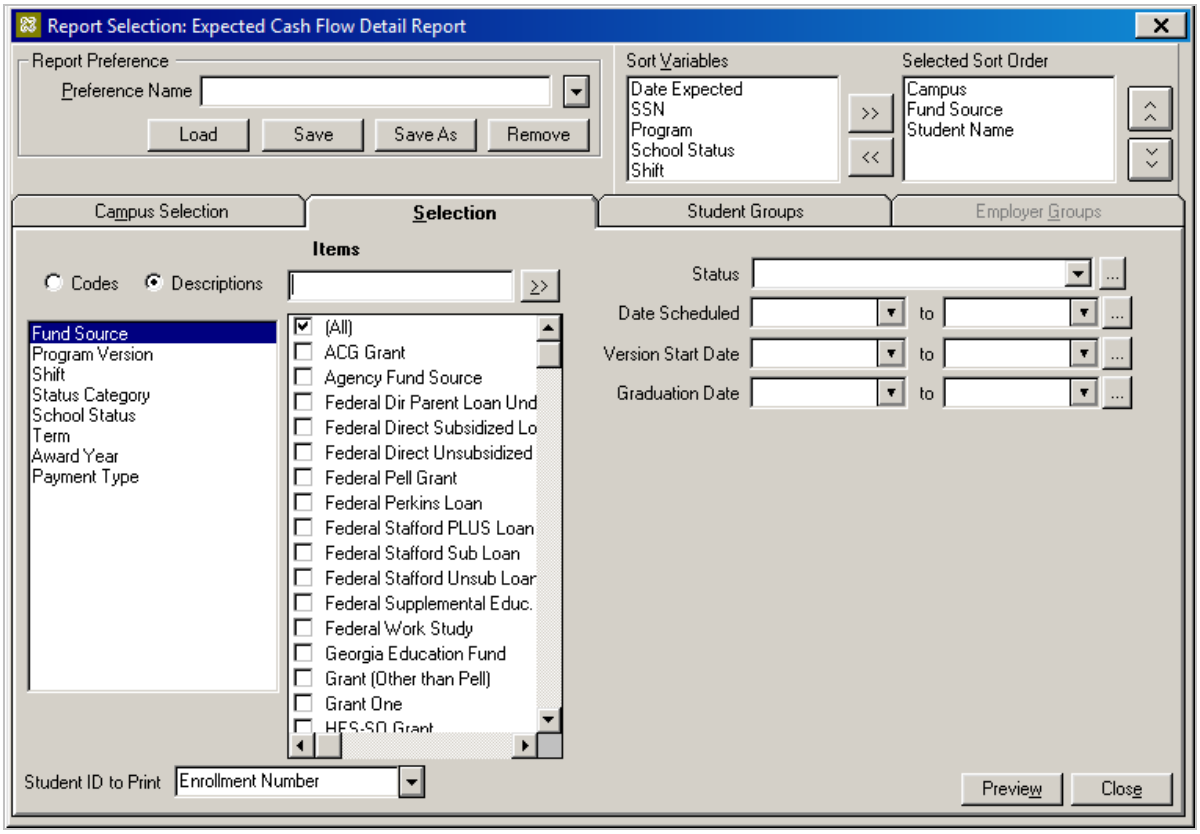
Expected Cash Flow Detail Report

This report provides details to back up the Expected Cash Flow Summary report.

To run the report:

1. Navigate to **Reports > Financial Aid > Expected Cash Flow Detail Report**. The Report Selection: Expected Cash Flow Detail Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Note: Select three sort variables. If you are matching the expected cash flow details to the Expected Cash Flow Summary Report, the sort variables should be the same.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

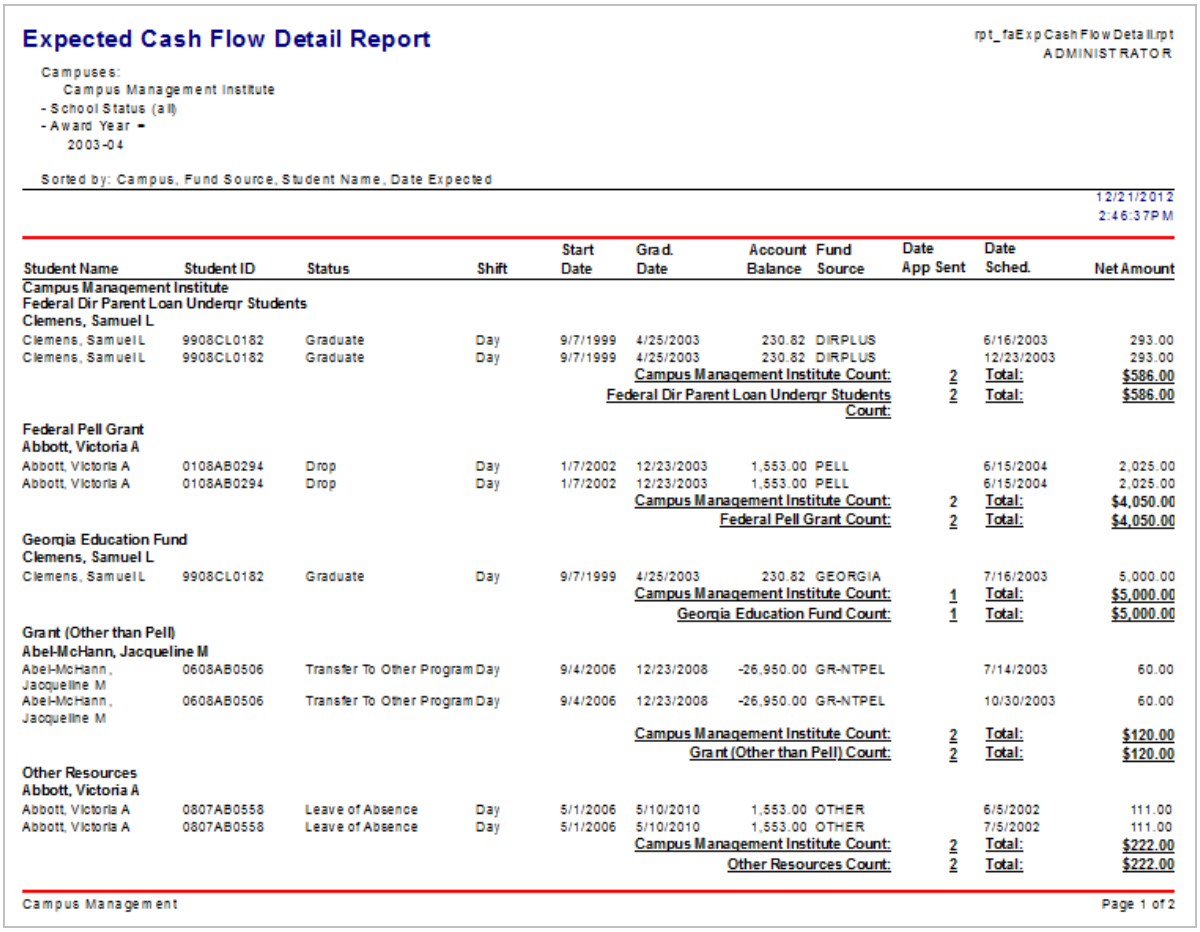
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Student ID
   - School Status
   - Shift

- Start Date
- Graduation Date
- Account Balance
- Fund Source
- Date App Sent
- Date Scheduled
- Net Amount

Subtotals and a grand total are listed with counts and amounts. The drop date is listed in the Excel output view.



Expected Cash Flow Detail Report

rpt_faExpCashFlowDetail.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- School Status (all)
- Award Year =
2003-04

Sorted by: Campus, Fund Source, Student Name, Date Expected

12/21/2012
2:46:37PM

Student Name	Student ID	Status	Shift	Start Date	Grad. Date	Account Balance	Fund Source	Date App Sent	Date Sched.	Net Amount
Campus Management Institute										
Federal Dir Parent Loan Undergr Students										
Clemens, Samuel L										
Clemens, Samuel L	9908CL0182	Graduate	Day	9/7/1999	4/25/2003	230.82	DIRPLUS		6/16/2003	293.00
Clemens, Samuel L	9908CL0182	Graduate	Day	9/7/1999	4/25/2003	230.82	DIRPLUS		12/23/2003	293.00
						Campus Management Institute Count:		2	Total:	$586.00
						Federal Dir Parent Loan Undergr Students Count:		2	Total:	$586.00
Federal Pell Grant										
Abbott, Victoria A										
Abbott, Victoria A	0108AB0294	Drop	Day	1/7/2002	12/23/2003	1,553.00	PELL		6/15/2004	2,025.00
Abbott, Victoria A	0108AB0294	Drop	Day	1/7/2002	12/23/2003	1,553.00	PELL		6/15/2004	2,025.00
						Campus Management Institute Count:		2	Total:	$4,050.00
						Federal Pell Grant Count:		2	Total:	$4,050.00
Georgia Education Fund										
Clemens, Samuel L										
Clemens, Samuel L	9908CL0182	Graduate	Day	9/7/1999	4/25/2003	230.82	GEORGIA		7/16/2003	5,000.00
						Campus Management Institute Count:		1	Total:	$5,000.00
						Georgia Education Fund Count:		1	Total:	$5,000.00
Grant (Other than Pell)										
Abel-McHann, Jacqueline M										
Abel-McHann, Jacqueline M	0608AB0506	Transfer To Other Program	Day	9/4/2006	12/23/2008	-26,950.00	GR-NTPEL		7/14/2003	60.00
Abel-McHann, Jacqueline M	0608AB0506	Transfer To Other Program	Day	9/4/2006	12/23/2008	-26,950.00	GR-NTPEL		10/30/2003	60.00
						Campus Management Institute Count:		2	Total:	$120.00
						Grant (Other than Pell) Count:		2	Total:	$120.00
Other Resources										
Abbott, Victoria A										
Abbott, Victoria A	0807AB0558	Leave of Absence	Day	5/1/2006	5/10/2010	1,553.00	OTHER		6/5/2002	111.00
Abbott, Victoria A	0807AB0558	Leave of Absence	Day	5/1/2006	5/10/2010	1,553.00	OTHER		7/5/2002	111.00
						Campus Management Institute Count:		2	Total:	$222.00
						Other Resources Count:		2	Total:	$222.00

Campus Management

Page 1 of 2

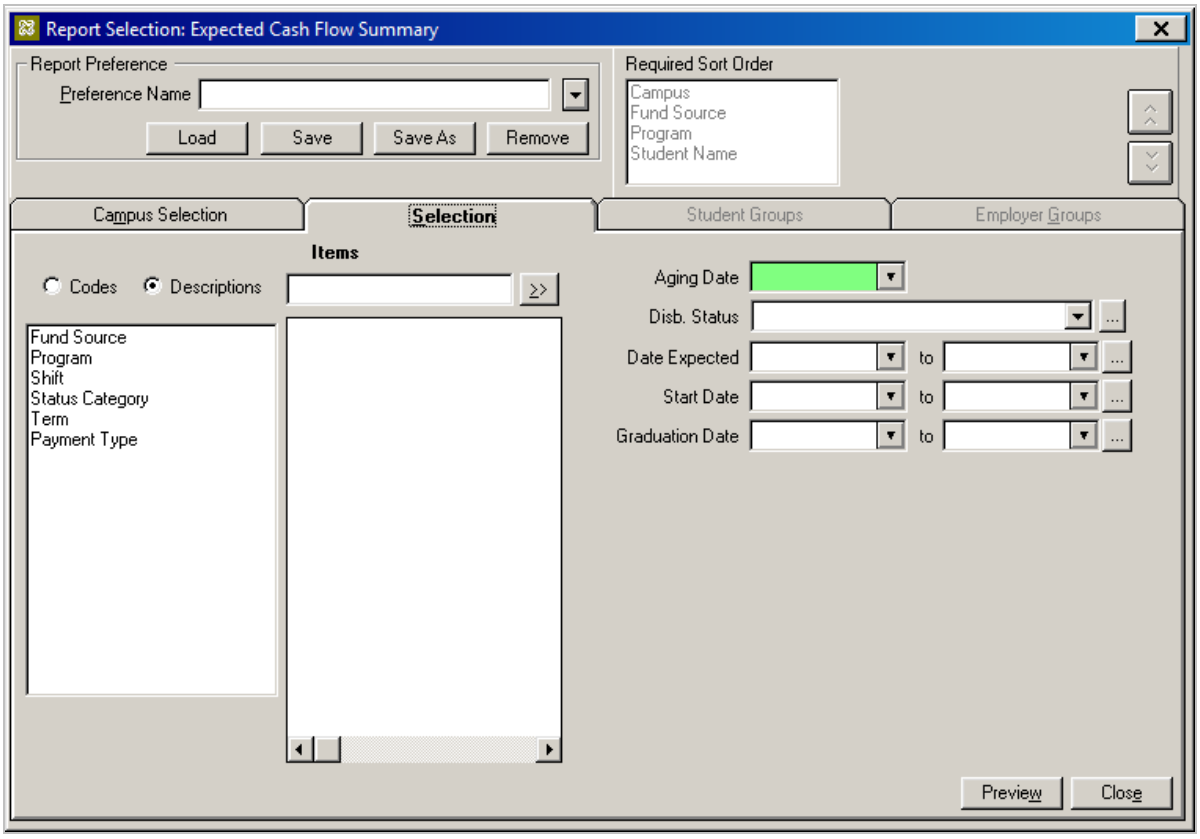
Expected Cash Flow Summary

This report presents a summary of the expected cash flow. The report selects disbursements that have not yet been received.

The report does not select records from the FA disbursement table if the disbursement status is Canceled or Paid.

To run the report:

1. Navigate to **Reports > Financial Aid > Expected Cash Flow Summary Report**. The Report Selection: Expected Cash Flow Summary Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

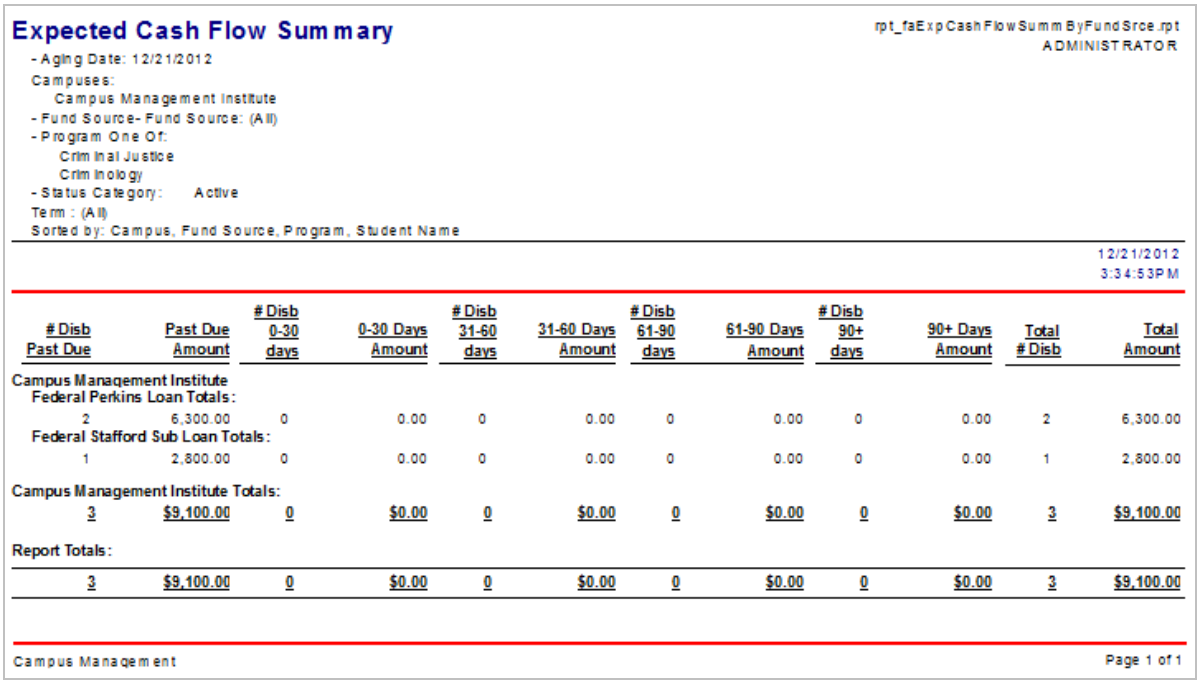


4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Fund Source
   - Past Due number of disbursements and amount for current (less than 30 days), 30, 60, 90+

- Row totals, column subtotals, and grand totals for amounts



Expected Cash Flow Summary

rpt_faExpCashFlowSummByFundSrce.rpt
ADMINISTRATOR

- Aging Date: 12/21/2012
Campuses:
Campus Management Institute
- Fund Source- Fund Source: (All)
- Program One Of:
Criminal Justice
Criminology
- Status Category: Active
Term : (All)
Sorted by: Campus, Fund Source, Program, Student Name

12/21/2012
3:34:53PM

# Disb Past Due	Past Due Amount	# Disb 0-30 days	0-30 Days Amount	# Disb 31-60 days	31-60 Days Amount	# Disb 61-90 days	61-90 Days Amount	# Disb 90+ days	90+ Days Amount	Total # Disb	Total Amount
Campus Management Institute											
Federal Perkins Loan Totals:											
2	6,300.00	0	0.00	0	0.00	0	0.00	0	0.00	2	6,300.00
Federal Stafford Sub Loan Totals:											
1	2,800.00	0	0.00	0	0.00	0	0.00	0	0.00	1	2,800.00
Campus Management Institute Totals:											
3	$9,100.00	0	$0.00	0	$0.00	0	$0.00	0	$0.00	3	$9,100.00
Report Totals:											
3	$9,100.00	0	$0.00	0	$0.00	0	$0.00	0	$0.00	3	$9,100.00

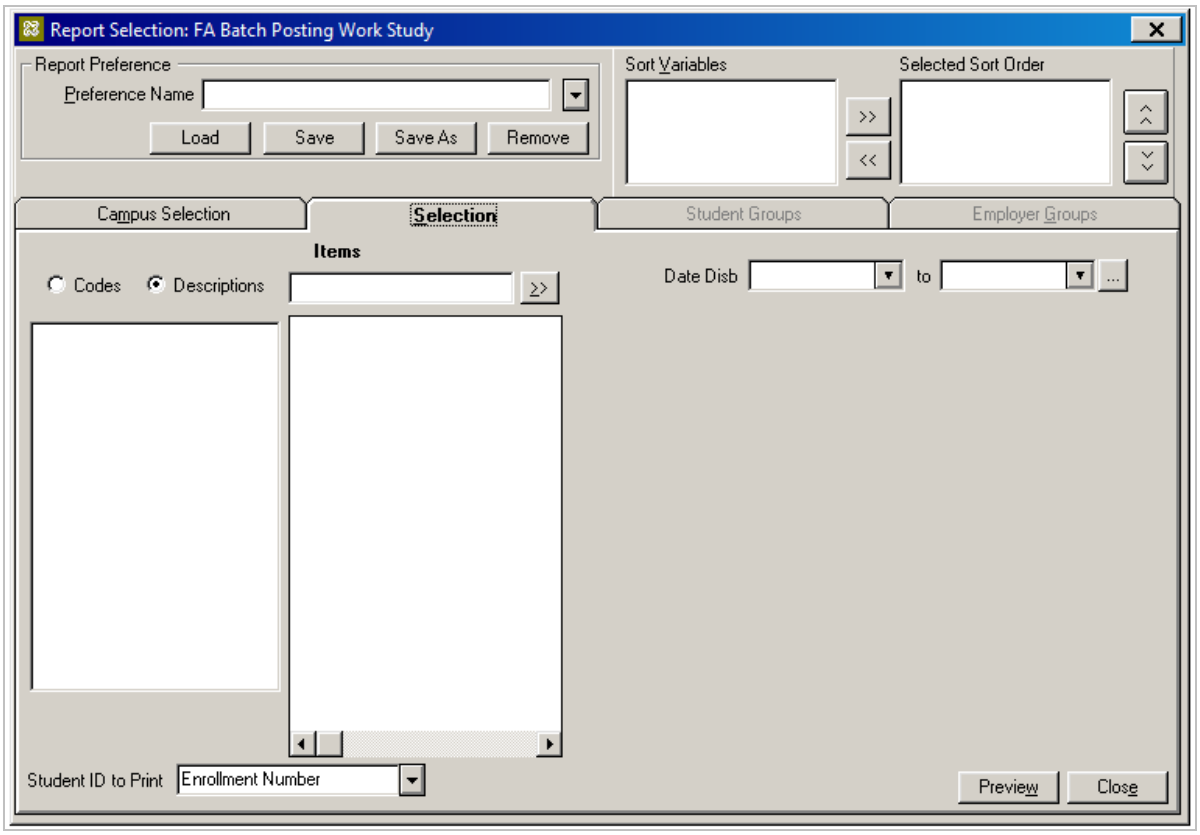
Campus Management
Page 1 of 1

FA Batch Posting Work Study

This report lists work study payments that have been entered in CampusNexus Student. The report shows a grand total on the amount paid sorted by student name.

To run the report:

1. Navigate to **Reports > Financial Aid > FA Batch Posting Work Study**. The Report Selection: FA Batch Posting Work Study form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



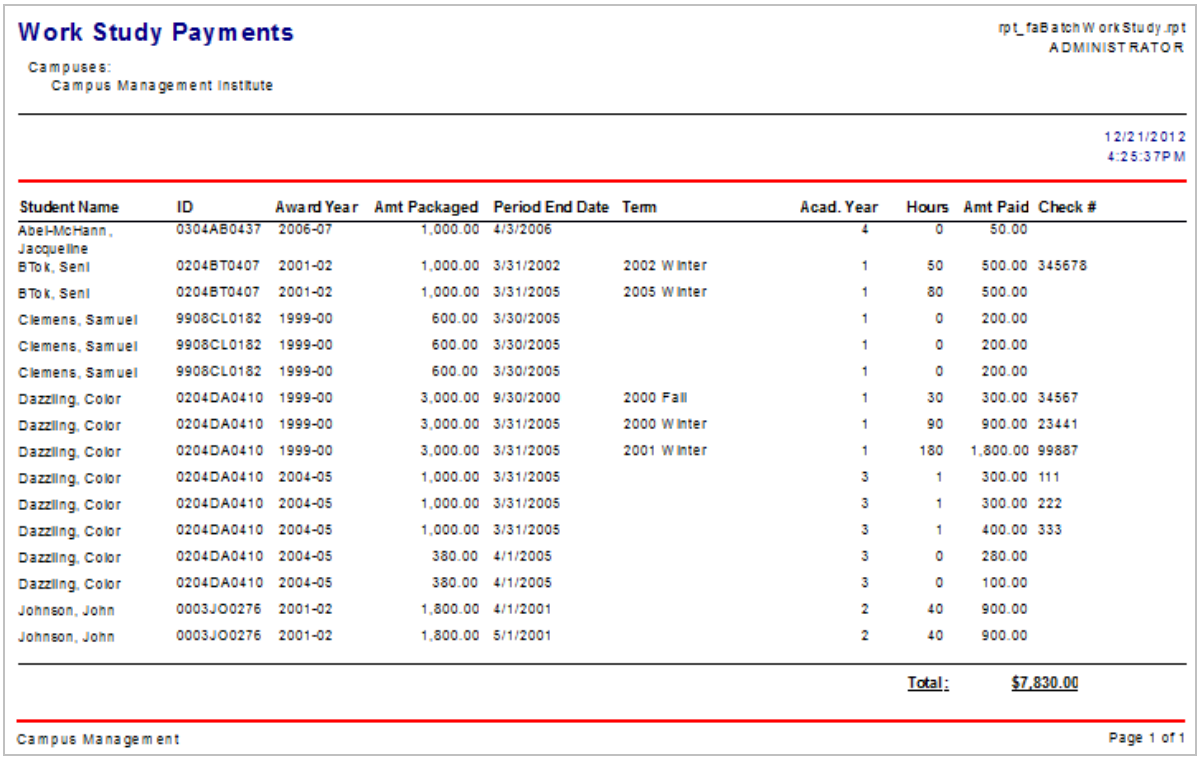
4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Student ID
   - Award Year
   - Amount Packaged
   - Period End Date
   - Term
   - Academic Year
   - Hours

- Amount Paid
- Check Number

There is a grand total on amount paid.



Work Study Payments

rpt_faBatchWorkStudy.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute

12/21/2012
4:25:37PM

Student Name	ID	Award Year	Amt Packaged	Period End Date	Term	Acad. Year	Hours	Amt Paid	Check #
Abel-McHann, Jacqueline	0304AB0437	2006-07	1,000.00	4/3/2006		4	0	50.00	
BTok, Seni	0204BT0407	2001-02	1,000.00	3/31/2002	2002 Winter	1	50	500.00	345678
BTok, Seni	0204BT0407	2001-02	1,000.00	3/31/2005	2005 Winter	1	80	500.00	
Clemens, Samuel	9908CL0182	1999-00	600.00	3/30/2005		1	0	200.00	
Clemens, Samuel	9908CL0182	1999-00	600.00	3/30/2005		1	0	200.00	
Clemens, Samuel	9908CL0182	1999-00	600.00	3/30/2005		1	0	200.00	
Dazzling, Color	0204DA0410	1999-00	3,000.00	9/30/2000	2000 Fall	1	30	300.00	34567
Dazzling, Color	0204DA0410	1999-00	3,000.00	3/31/2005	2000 Winter	1	90	900.00	23441
Dazzling, Color	0204DA0410	1999-00	3,000.00	3/31/2005	2001 Winter	1	180	1,800.00	99887
Dazzling, Color	0204DA0410	2004-05	1,000.00	3/31/2005		3	1	300.00	111
Dazzling, Color	0204DA0410	2004-05	1,000.00	3/31/2005		3	1	300.00	222
Dazzling, Color	0204DA0410	2004-05	1,000.00	3/31/2005		3	1	400.00	333
Dazzling, Color	0204DA0410	2004-05	380.00	4/1/2005		3	0	280.00	
Dazzling, Color	0204DA0410	2004-05	380.00	4/1/2005		3	0	100.00	
Johnson, John	0003JO0276	2001-02	1,800.00	4/1/2001		2	40	900.00	
Johnson, John	0003JO0276	2001-02	1,800.00	5/1/2001		2	40	900.00	
							Total:	$7,830.00	

Campus Management

Page 1 of 1

FA Disbursement Batch Tracking

This report provides a detailed audit trail to the batches prepared and posted in CampusNexus Student. This report can be used to view the paid or not paid status of each disbursement in a batch.

This report gathers data from two tables: FaDisbBatch and FaDisbBatchDetail. The FaDisbBatch table holds one record for each batch of disbursements prepared in CampusNexus Student. The FaDisbBatchDetail table holds one record for each disbursement in each batch.

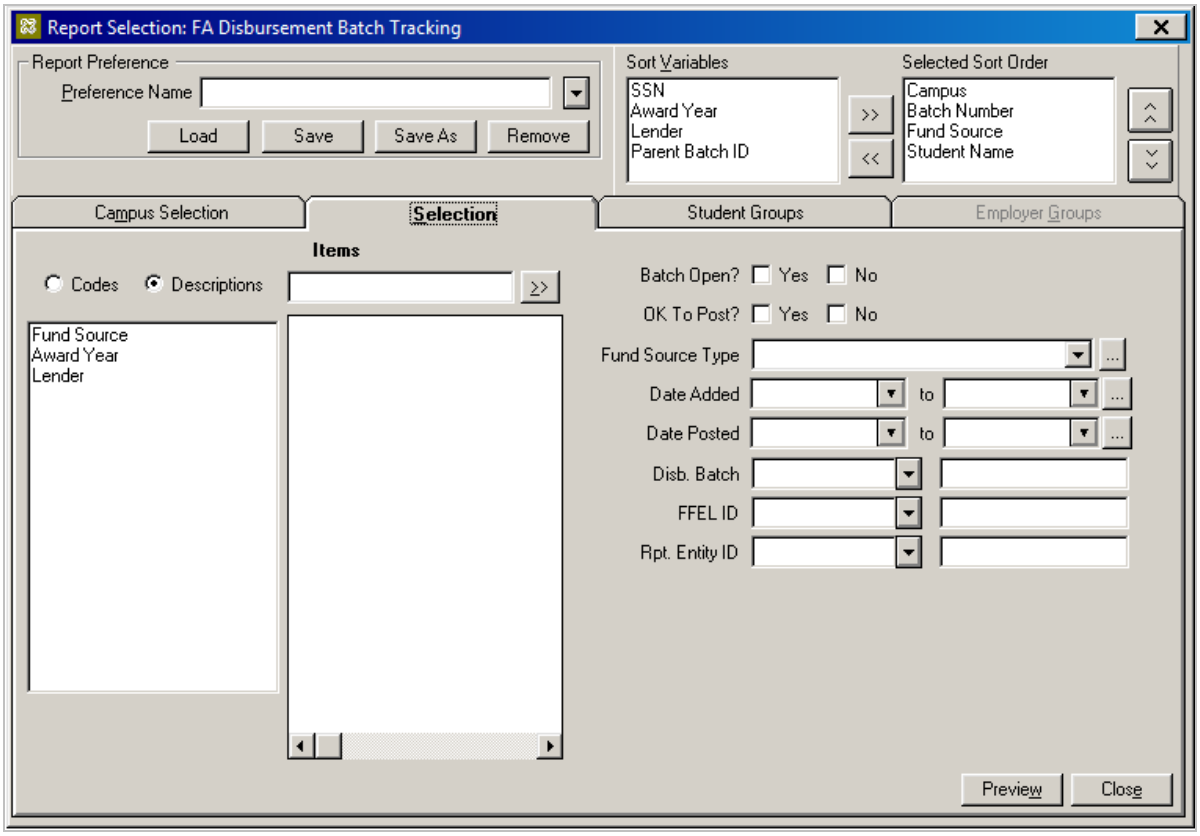
To run the report:

1. Navigate to **Reports > Financial Aid > FA Disbursement Batch Tracking**. The Report Selection: FA Disbursement Batch Tracking form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Notes:

   - The Batch Open? and OK To Post? flags allow you to select batches that have not yet been approved to post.
   - The FFEL ID and Rpt. Entity ID fields enable you to submit one or more IDs as selection criteria. The FFEL ID must be in the following format: FFEL ID plus Branch (e.g., 12345678).
   - You can only view disbursement records associated with FFEL IDs or Rpt. Entity IDs that belong to the campus locations to which you have security access.
   - When you enter the FFEL IDs or the Rpt. Entity ID, these IDs override the Campus Selection tab as well as the selection criterion under Items on the Selection tab. If the FFEL ID is not used, the report displays campus specific information (as selected in the criteria) per your defined campus permissions.
   - The Disb. Batch field allows you to enter comparison parameters for batch numbers, such as Equal to, Not Equal To, Greater than, Less than, etc., before the Batch Number. To generate a report for specific batch numbers, enter the batch number or multiple batch numbers separated by semicolons (;).
   - When generating this report, the following is applicable only if Campus is selected in the Selected Sort Order section to display the disbursement totals based upon campus locations:
     - If the output includes more than one batch, all original batch records are displayed together and provide a batch total for the entire original batch.
     - The disbursement records are sorted by campus, providing a summary per campus location to include the sum total per campus location.
     - If more than one FFEL ID is included in the report, the disbursement records are sorted by FFEL ID and then campus locations, giving a sum total per FFEL ID, and providing a secondary sort by campus location.
     - If more than one Rpt. Entity ID is included in the report, the disbursement records are sorted by Rpt.

Entity ID and then by campus locations, giving a sum total per Rpt. Entity ID, and providing a secondary sort by campus location.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

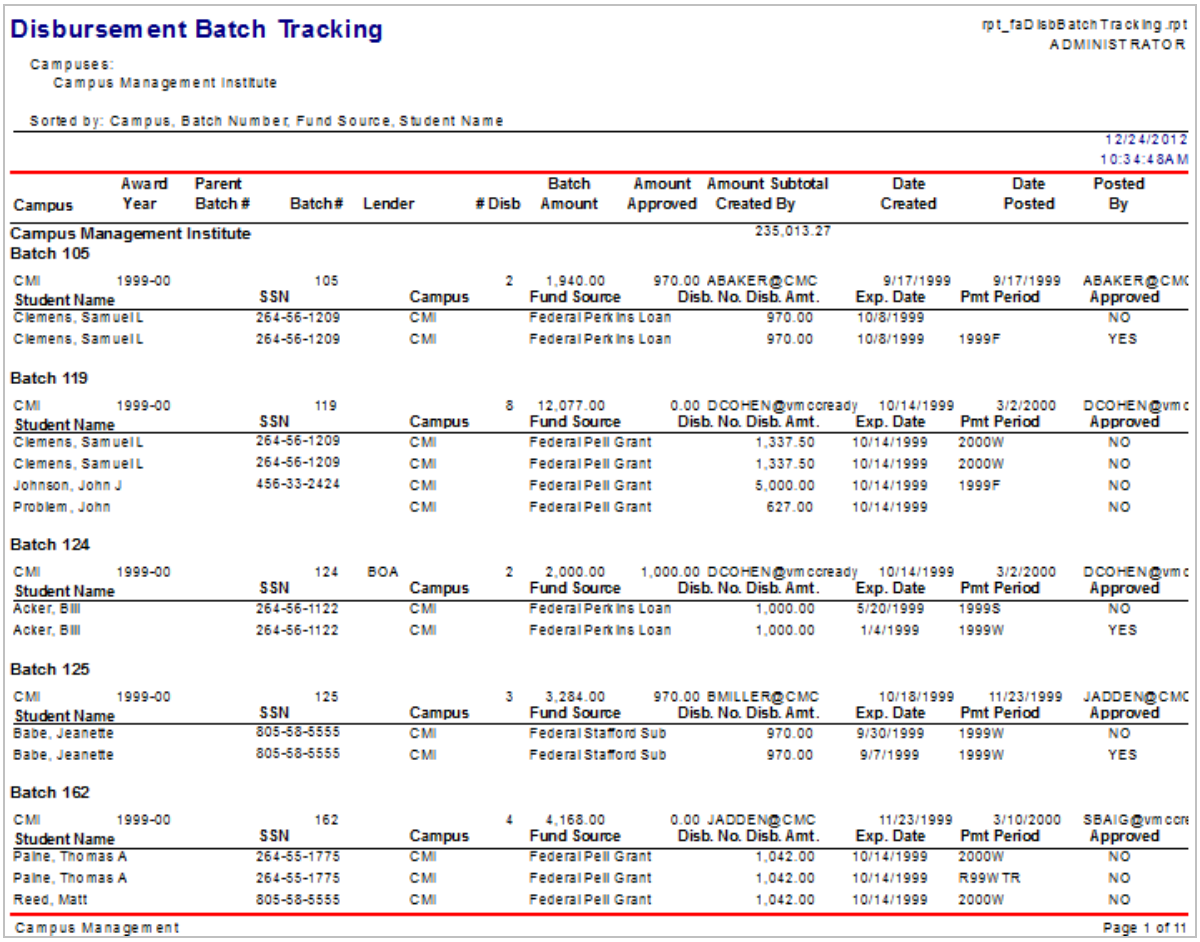
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Campus
   - Award Year
   - Batch #
   - Lender
   - # Disbursements
   - Batch Amount
   - Approved Amount
   - Created By
   - Date Credits
   - Date Posted
   - Posted by
   - Student Name
   - SSN
   - Fund Source
   - Disbursement Number (for each disbursement included in the batch)
   - Disbursement Amount
   - Expiration Date

- Payment Period
- Approval indicator (Yes/No)
- Additional Information

If any students in this batch are missing documents, a field labeled ' Missing Documents' is presented in the Additional Information area. Document Codes for all missing documents, by student, are listed.



Disbursement Batch Tracking

rpt_faDisbBatchTracking.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute

Sorted by: Campus, Batch Number, Fund Source, Student Name

12/24/2012
10:34:48AM

Campus	Award Year	Parent Batch #	Batch#	Lender	# Disb	Batch Amount	Amount Approved	Amount Subtotal Created By	Date Created	Date Posted	Posted By
Campus Management Institute								235,013.27			
Batch 105											
CMI	1999-00		105		2	1,940.00	970.00	ABAKER@CMC	9/17/1999	9/17/1999	ABAKER@CMC
Student Name		**SSN**		**Campus**		**Fund Source**		**Disb. No.** **Disb. Amt.**	**Exp. Date**	**Pmt Period**	**Approved**
Clemens, Samuel L		264-56-1209		CMI		Federal Perkins Loan		970.00	10/8/1999		NO
Clemens, Samuel L		264-56-1209		CMI		Federal Perkins Loan		970.00	10/8/1999	1999F	YES
Batch 119											
CMI	1999-00		119		8	12,077.00	0.00	DCOHEN@vmcready	10/14/1999	3/2/2000	DCOHEN@vmc
Student Name		**SSN**		**Campus**		**Fund Source**		**Disb. No.** **Disb. Amt.**	**Exp. Date**	**Pmt Period**	**Approved**
Clemens, Samuel L		264-56-1209		CMI		Federal Pell Grant		1,337.50	10/14/1999	2000W	NO
Clemens, Samuel L		264-56-1209		CMI		Federal Pell Grant		1,337.50	10/14/1999	2000W	NO
Johnson, John J		456-33-2424		CMI		Federal Pell Grant		5,000.00	10/14/1999	1999F	NO
Problem, John				CMI		Federal Pell Grant		627.00	10/14/1999		NO
Batch 124											
CMI	1999-00		124	BOA	2	2,000.00	1,000.00	DCOHEN@vmcready	10/14/1999	3/2/2000	DCOHEN@vmc
Student Name		**SSN**		**Campus**		**Fund Source**		**Disb. No.** **Disb. Amt.**	**Exp. Date**	**Pmt Period**	**Approved**
Acker, Bill		264-56-1122		CMI		Federal Perkins Loan		1,000.00	5/20/1999	1999S	NO
Acker, Bill		264-56-1122		CMI		Federal Perkins Loan		1,000.00	1/4/1999	1999W	YES
Batch 125											
CMI	1999-00		125		3	3,284.00	970.00	BMILLER@CMC	10/18/1999	11/23/1999	JADDEN@CMC
Student Name		**SSN**		**Campus**		**Fund Source**		**Disb. No.** **Disb. Amt.**	**Exp. Date**	**Pmt Period**	**Approved**
Babe, Jeanette		805-58-5555		CMI		Federal Stafford Sub		970.00	9/30/1999	1999W	NO
Babe, Jeanette		805-58-5555		CMI		Federal Stafford Sub		970.00	9/7/1999	1999W	YES
Batch 162											
CMI	1999-00		162		4	4,168.00	0.00	JADDEN@CMC	11/23/1999	3/10/2000	SBAIG@vmccre
Student Name		**SSN**		**Campus**		**Fund Source**		**Disb. No.** **Disb. Amt.**	**Exp. Date**	**Pmt Period**	**Approved**
Paine, Thomas A		264-55-1775		CMI		Federal Pell Grant		1,042.00	10/14/1999	2000W	NO
Paine, Thomas A		264-55-1775		CMI		Federal Pell Grant		1,042.00	10/14/1999	R99WTR	NO
Reed, Matt		805-58-5555		CMI		Federal Pell Grant		1,042.00	10/14/1999	2000W	NO

Campus Management

Page 1 of 11

FA Export/Import Batch Tracking

This report lists information about files that have been imported or exported for Application Processing, Clearinghouse, COD, Direct Loan, Pell/RFMS, SSCR and SSCE. The report provides summary list of files and helps the school quickly identify any batches for which the school has not received a response or batches that have been rejected. In addition, this report provides a summary snapshot of Financial Aid activity that is occurring at the school.

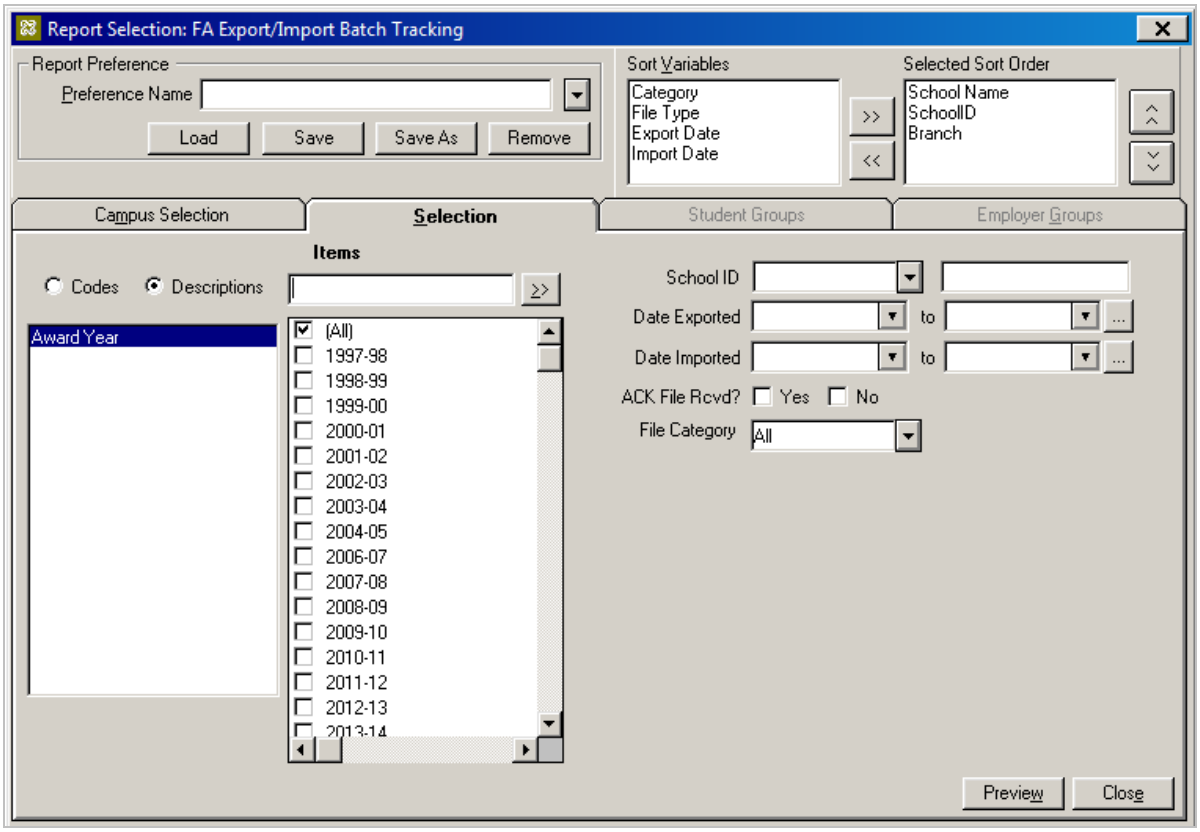
The data for this report is extracted from FaBatchExpImp. This table contains records for several categories of batches. The File category includes the following batches:

- All
- ACG/SMART
- Application Processing
- Clearinghouse
- Common Origination and Disbursement (COD)
- Direct Loan
- Pell/RFMS
- SSCE Error Notification
- SSCE Roster file

This means that the only records that are considered for inclusion on this report are records where the column ExtImpType = ACG/SMART, APPLICPROC, CLEARINGHS, DIRECTLOAN, Pell/RFMS, SSCR, SSCE.

To run the report:

1. Navigate to **Reports > Financial Aid > FA Export/Import Batch Tracking**. The Report Selection: FA Export/Import Batch Tracking form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - School Name
   - Branch ID
   - Category
   - File Type
   - Award Year (the word 'Multiple' displays for batches that are not specific to an award year)
   - Date Exported/Date Imported
   - Import and Export File Name
   - Number of Records
   - Batch ID/Batch Rejected Indicator
   - Exported by User/Imported by User

FA Export/Import Batch Tracking

rpt_faBatchTrack.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- File Category: All

Sorted by: School Name, SchoolID, Branch

12/24/2012
10:58:57AM

School Name	Branch	Category	File Type	Award Year	Date Exported/ Date Imported	# of Recs	Batch ID/ Batch Rej?	Export By/ Import By
No School Name								
		SSCR		Multiple	10/27/2000	297	19991111112050123456	ABAKER@CMC
					10/27/2000			
		File name exported:	N:\data\t4\sscr00IN.003					
		File name imported:	N:\data\t4\sscr00op.003					
		DIRECTLOAN	DLSAS	1999-00				SBAIG@vmccready sso
					1/25/2000			SBAIG@vmccready sso
		File name exported:						
		File name imported:	DSAS00.txt					
		SSCR		Multiple	10/2/2002	322	20011218084424009999	ABAKER@CMC
					10/2/2002			
		File name exported:	I:\HelpSystem\ED Files\sscrxxIN.004					
		File name imported:	I:\HelpSystem\ED Files\sscrxxop.004					
		COD	COD	2008-09			2009-07-24T15:51:50.0789677911	ADMINISTRATOR
					5/30/2011			ADMINISTRATOR
		File name exported:						
		File name imported:	h:\comrecop.007					
		COD	COD	2008-09			2009-07-24T15:51:49.0789677911	ADMINISTRATOR
					5/30/2011			ADMINISTRATOR
		File name exported:						
		File name imported:	h:\comrecop.031					
		COD	COD	2012-13	9/13/2012	1	2012-09-13T13:34:39.9077777777	ADMINISTRATOR
					9/13/2012			ADMINISTRATOR
		File name exported:	COMRECIN.001					

Campus Management

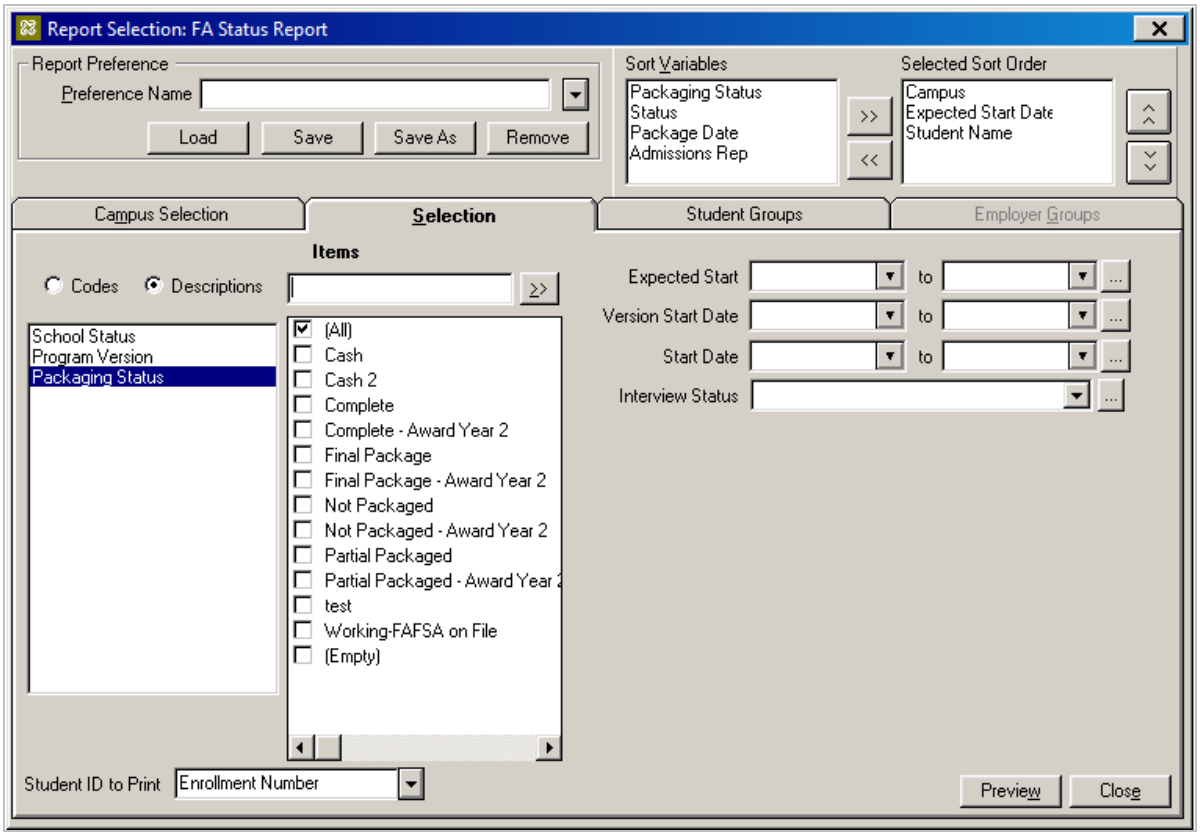
Page 1 of 30

FA Status Report

This report is used to track financial aid packaging information for students.

To run the report:

1. Navigate to **Reports > Financial Aid > FA Status Report** The Report Selection: FA Status Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

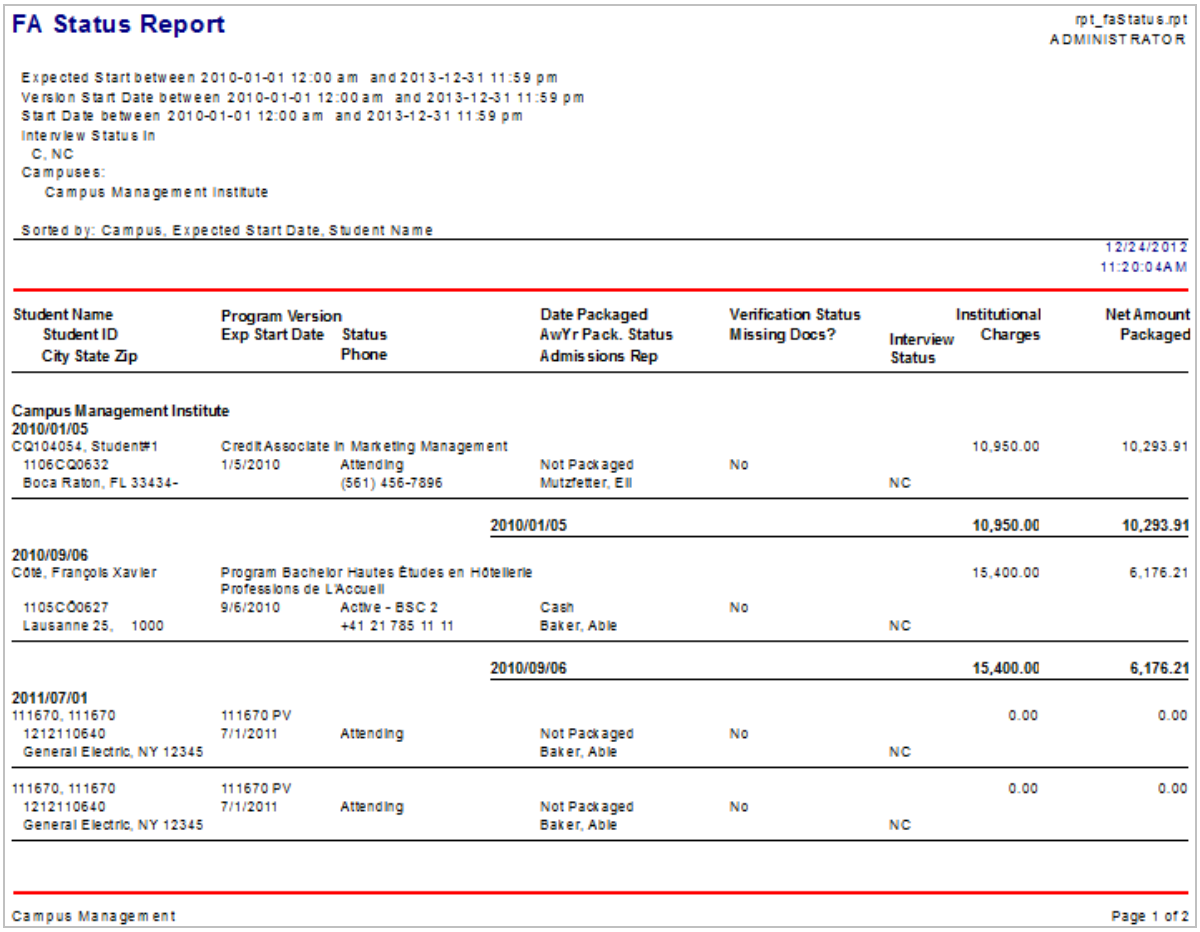
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Program Version
   - Date Packaged
   - Verification Status
   - Institutional Charges
   - Net Amount Packaged

- Student Id
- Expected Start Date
- Status
- Award Year Packaged Status
- Missing Documents
- Interview Status
- City, State, ZIP
- Phone
- Admissions Rep

The Net Amount calculation excludes canceled disbursements and displays the adjusted Net Amount on the report.



FA Status Report

rpt_faStatus.rpt
ADMINISTRATOR

Expected Start between 2010-01-01 12:00 am and 2013-12-31 11:59 pm
Version Start Date between 2010-01-01 12:00 am and 2013-12-31 11:59 pm
Start Date between 2010-01-01 12:00 am and 2013-12-31 11:59 pm
Interview Status In
C, NC
Campuses:
Campus Management Institute

Sorted by: Campus, Expected Start Date, Student Name

12/24/2012
11:20:04AM

Student Name / Student ID / City State Zip	Program Version / Exp Start Date	Status / Phone	Date Packaged / AwYr Pack. Status / Admissions Rep	Verification Status / Missing Docs?	Interview Status	Institutional Charges	Net Amount Packaged
Campus Management Institute							
2010/01/05							
CQ104054, Student#1	Credit Associate in Marketing Management					10,950.00	10,293.91
1106CQ0632	1/5/2010	Attending	Not Packaged	No			
Boca Raton, FL 33434-		(561) 456-7896	Mutzfetter, Eli		NC		
		2010/01/05				**10,950.00**	**10,293.91**
2010/09/06							
Côté, François Xavier	Program Bachelor Hautes Études en Hôtellerie Professions de L'Accueil					15,400.00	6,176.21
1105CÔ0627	9/6/2010	Active - BSC 2	Cash	No			
Lausanne 25, 1000		+41 21 785 11 11	Baker, Able		NC		
		2010/09/06				**15,400.00**	**6,176.21**
2011/07/01							
111670, 111670	111670 PV					0.00	0.00
1212110640	7/1/2011	Attending	Not Packaged	No			
General Electric, NY 12345			Baker, Able		NC		
111670, 111670	111670 PV					0.00	0.00
1212110640	7/1/2011	Attending	Not Packaged	No			
General Electric, NY 12345			Baker, Able		NC		

Campus Management

Page 1 of 2

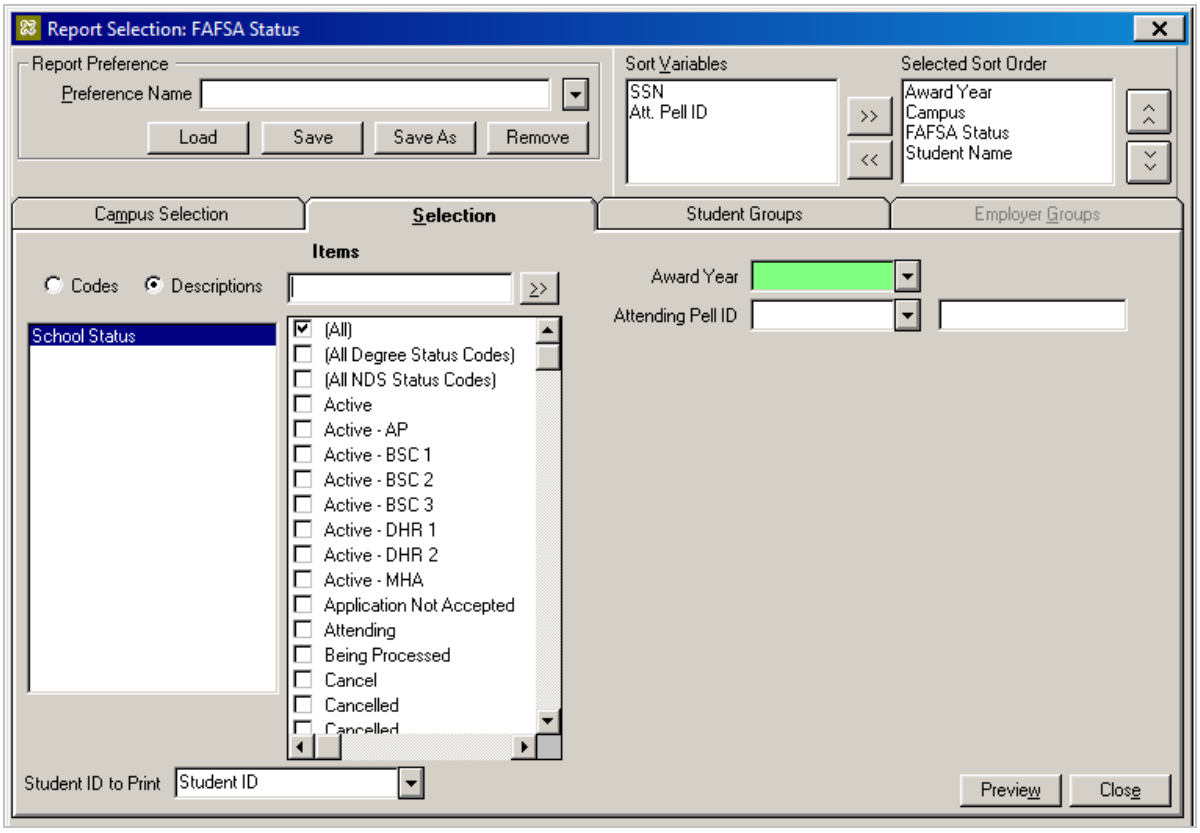
FAFSA Status

This report lists the students for which FAFSAs have been sent to the Central Processing System.

To run the report:

1. Navigate to **Reports > Financial Aid > FAFSA Status**. The Report Selection: FAFSA Status form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Note: The recommended sort order for this report is Award Year, Campus, FAFSA Status, and Student name. You must select an award year for the report.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

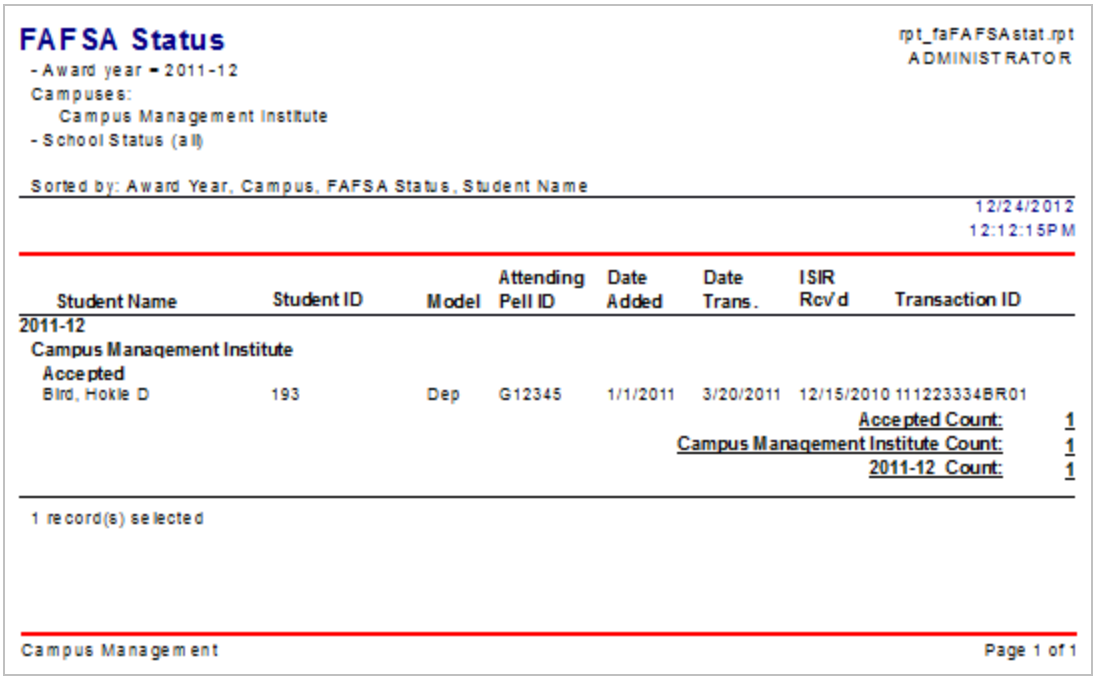
   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Award Year
   - Campus
   - School Status
   - Student Name
   - Student ID

- Model
- Attending Pell ID
- Date Added
- Date Transmitted
- ISIR Received
- Transaction ID



FAFSA Status

rpt_faFAFSAstat.rpt
ADMINISTRATOR

- Award year = 2011-12
Campuses:
Campus Management Institute
- School Status (all)

Sorted by: Award Year, Campus, FAFSA Status, Student Name

12/24/2012
12:12:15PM

Student Name	Student ID	Model	Attending Pell ID	Date Added	Date Trans.	ISIR Rcv'd	Transaction ID	
2011-12								
Campus Management Institute								
Accepted								
Bird, Hokie D	193	Dep	G12345	1/1/2011	3/20/2011	12/15/2010	111223334BR01	
							Accepted Count:	1
							Campus Management Institute Count:	1
							2011-12 Count:	1

1 record(s) selected

Campus Management
Page 1 of 1

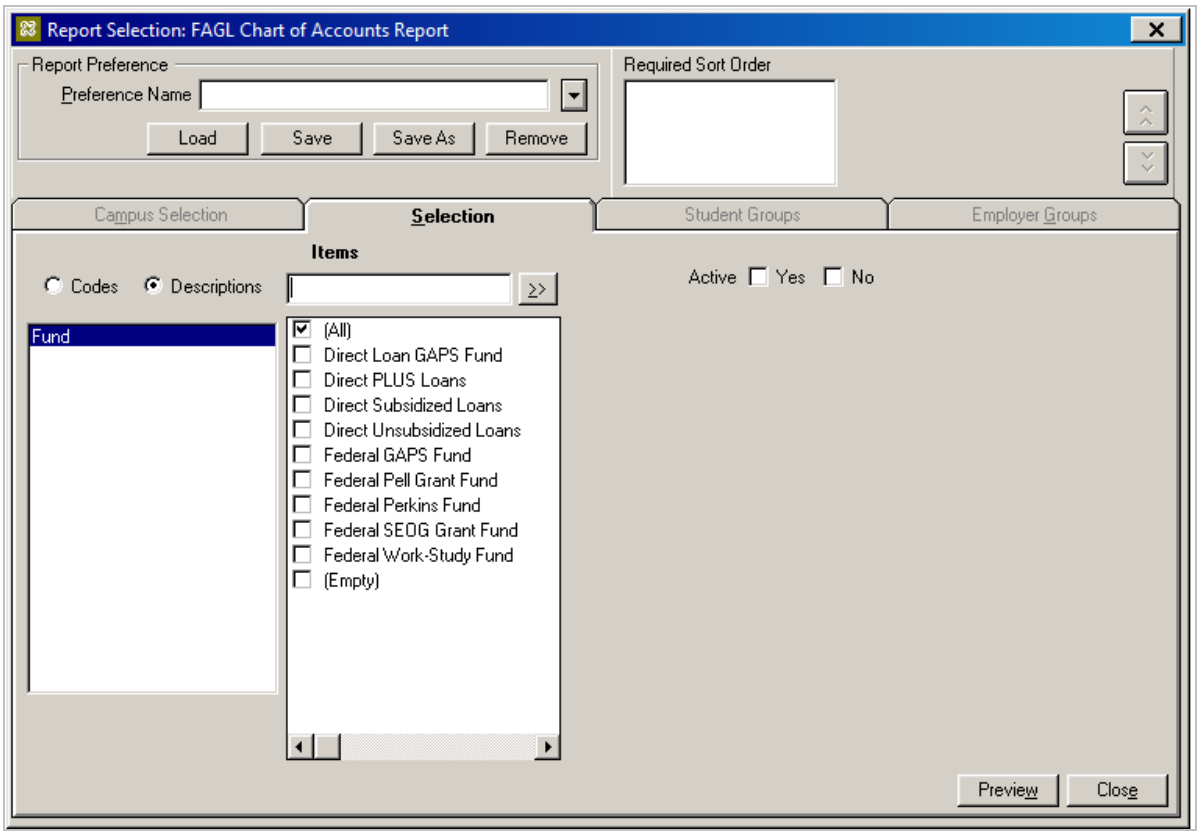
FAGL Chart of Accounts Report

This report lists the accounts that have been established to process your financial aid general ledger (FAGL).

To run the report:

1. Navigate to **Reports > Financial Aid > FAGL Chart of Accounts Report**. The Report Selection: FAGL Chart of Accounts Report form is displayed.
2. Select appropriate options on the Selection tab.

   Note: The report selection criteria include Fund and an option to include active, inactive, or all accounts. If n the active nor inactive option is selected, all accounts are included.

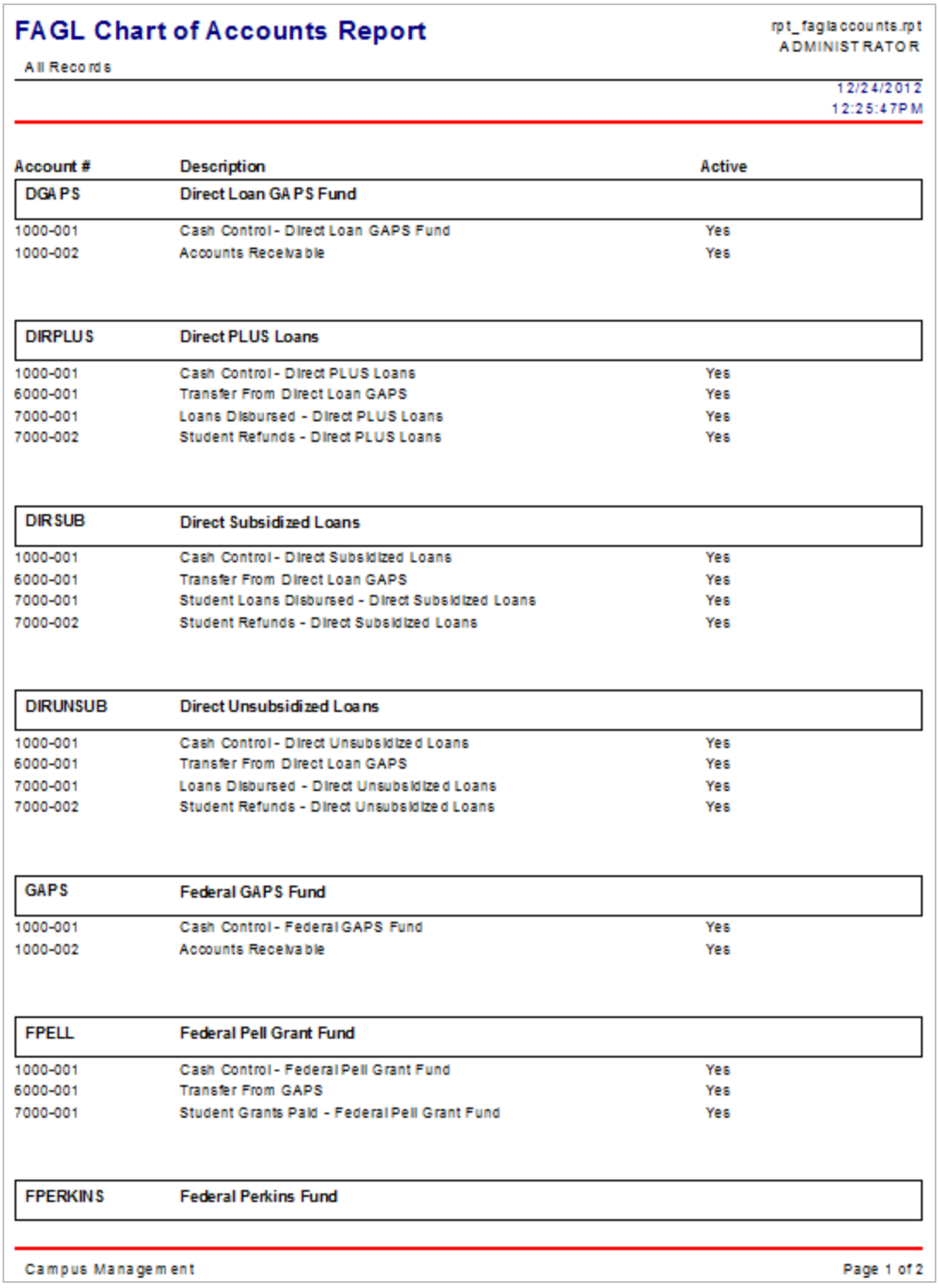


3. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Fund Code
   - Fund Description
   - Account Number
   - Account Description

- Active indicator (Yes/No)



FAGL Chart of Accounts Report

rpt_faglaccounts.rpt
ADMINISTRATOR

All Records

12/24/2012
12:25:47PM

Account #	Description	Active
DGAPS	**Direct Loan GAPS Fund**	
1000-001	Cash Control - Direct Loan GAPS Fund	Yes
1000-002	Accounts Receivable	Yes
DIRPLUS	**Direct PLUS Loans**	
1000-001	Cash Control - Direct PLUS Loans	Yes
6000-001	Transfer From Direct Loan GAPS	Yes
7000-001	Loans Disbursed - Direct PLUS Loans	Yes
7000-002	Student Refunds - Direct PLUS Loans	Yes
DIRSUB	**Direct Subsidized Loans**	
1000-001	Cash Control - Direct Subsidized Loans	Yes
6000-001	Transfer From Direct Loan GAPS	Yes
7000-001	Student Loans Disbursed - Direct Subsidized Loans	Yes
7000-002	Student Refunds - Direct Subsidized Loans	Yes
DIRUNSUB	**Direct Unsubsidized Loans**	
1000-001	Cash Control - Direct Unsubsidized Loans	Yes
6000-001	Transfer From Direct Loan GAPS	Yes
7000-001	Loans Disbursed - Direct Unsubsidized Loans	Yes
7000-002	Student Refunds - Direct Unsubsidized Loans	Yes
GAPS	**Federal GAPS Fund**	
1000-001	Cash Control - Federal GAPS Fund	Yes
1000-002	Accounts Receivable	Yes
FPELL	**Federal Pell Grant Fund**	
1000-001	Cash Control - Federal Pell Grant Fund	Yes
6000-001	Transfer From GAPS	Yes
7000-001	Student Grants Paid - Federal Pell Grant Fund	Yes
FPERKINS	**Federal Perkins Fund**	

Campus Management

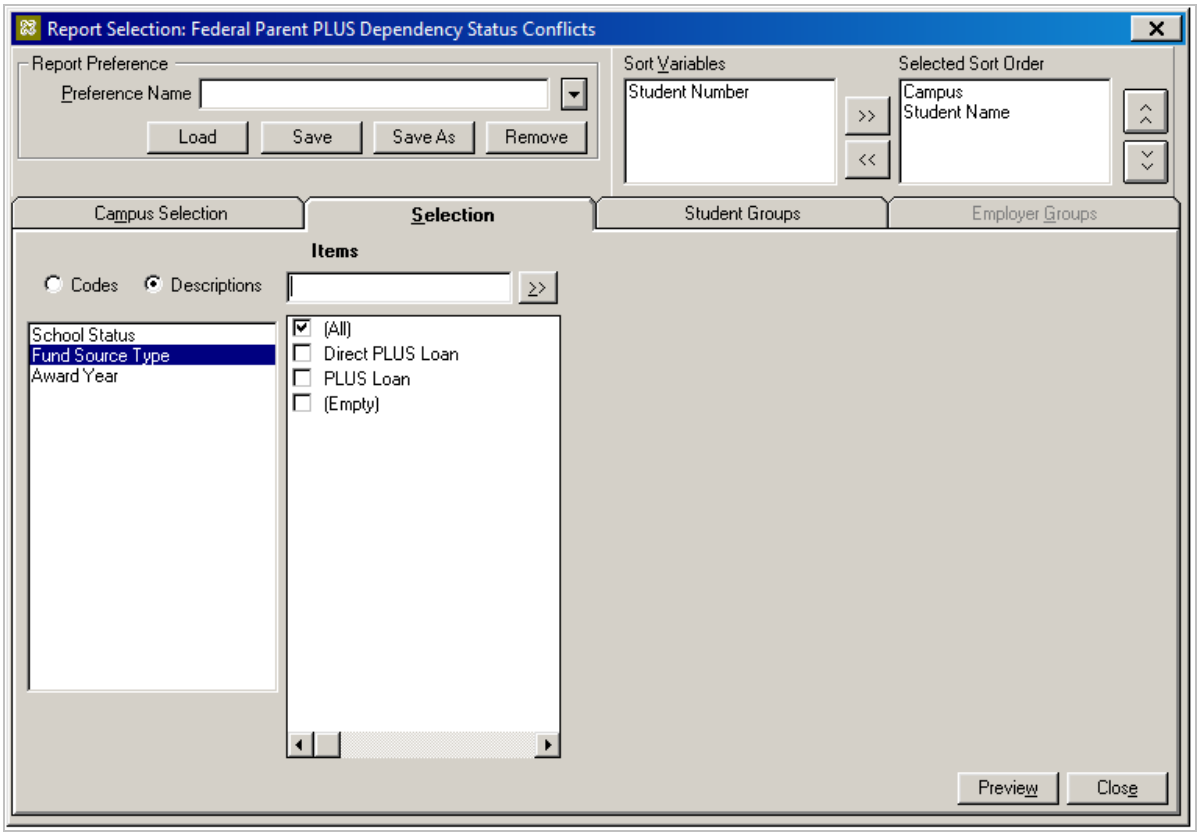
Page 1 of 2

Federal Parent PLUS Dependency Status Conflicts

This report displays student records that have conflicts in the dependency status.

To run the report:

1. Navigate to **Reports > Financial Aid > Federal Parent PLUS Dependency Status Conflicts**. The Report Selection: Federal Parent PLUS Dependency Status Conflicts form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Campus
   - Student Name
   - Student ID
   - Model
   - Fund Source
   - Total Amount

- Date Added
- Manual Dependency Status
- Academic Year

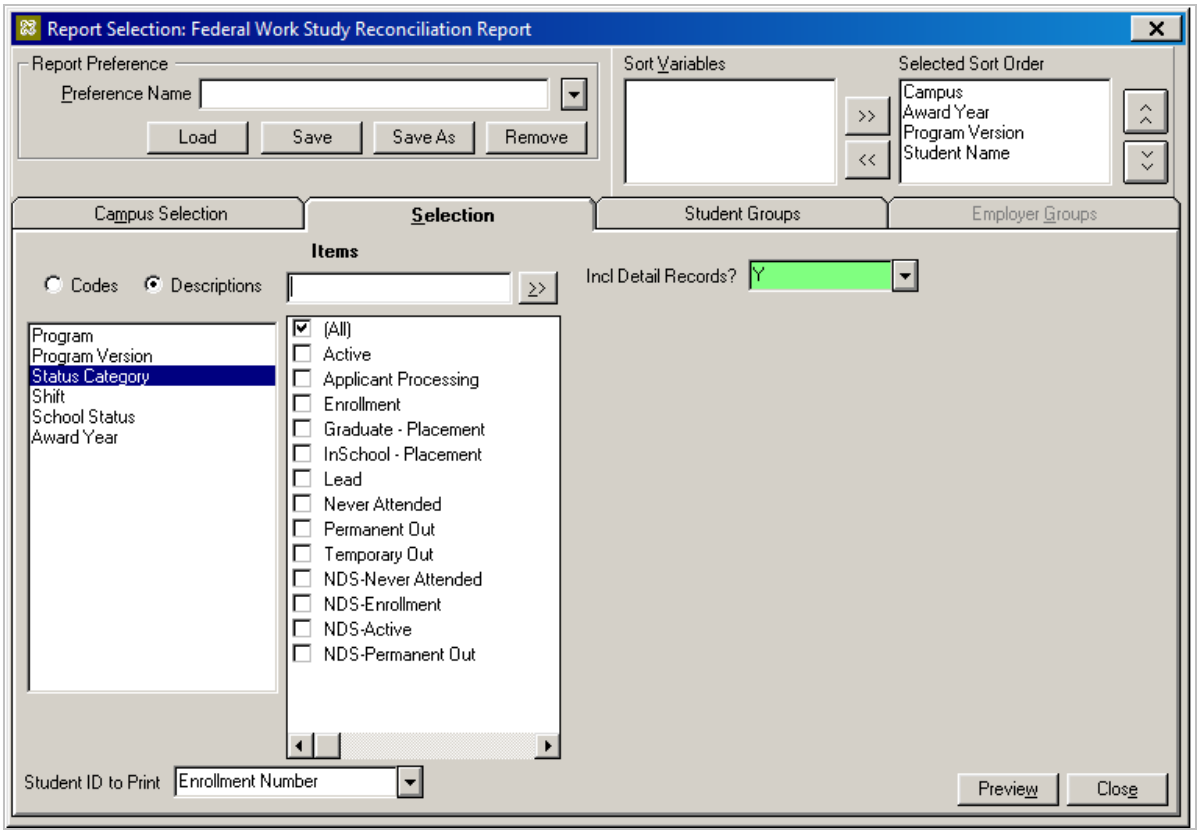
Federal Work Study Reconciliation Report

This report lists the hours worked, hourly rate, and other related information about students involved in the Work Study program.

To run the report:

1. Navigate to **Reports > Financial Aid > Federal Work Study Reconciliation Report**. The Report Selection: Federal Work Study Reconciliation Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Note: You must choose whether to display detail records on the report.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

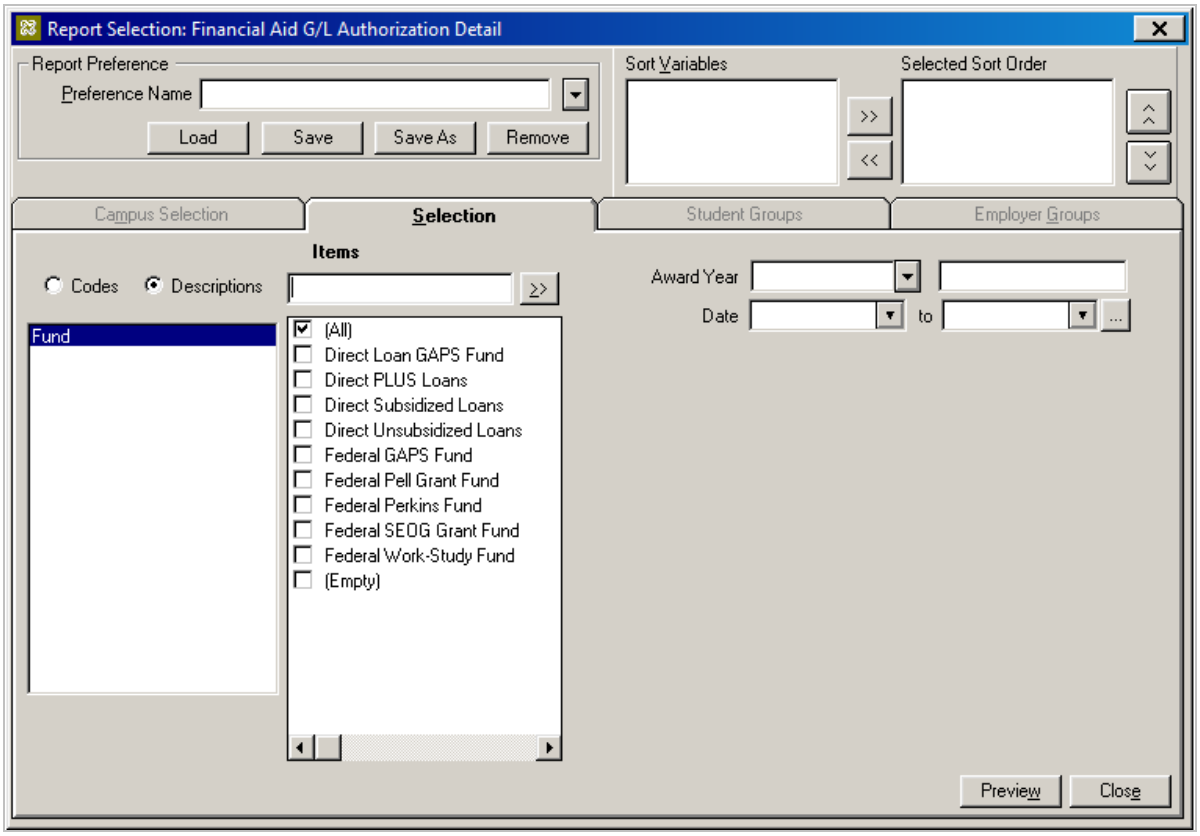
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

Financial Aid G/L Authorization Detail

This report lists the status of the authorization levels in the various fund accounts at the detail level.

To run the report:

1. Navigate to **Reports > Financial Aid > Financial Aid G/L Authorization Detail**. The Report Selection: Financial Aid G/L Authorization Detail form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

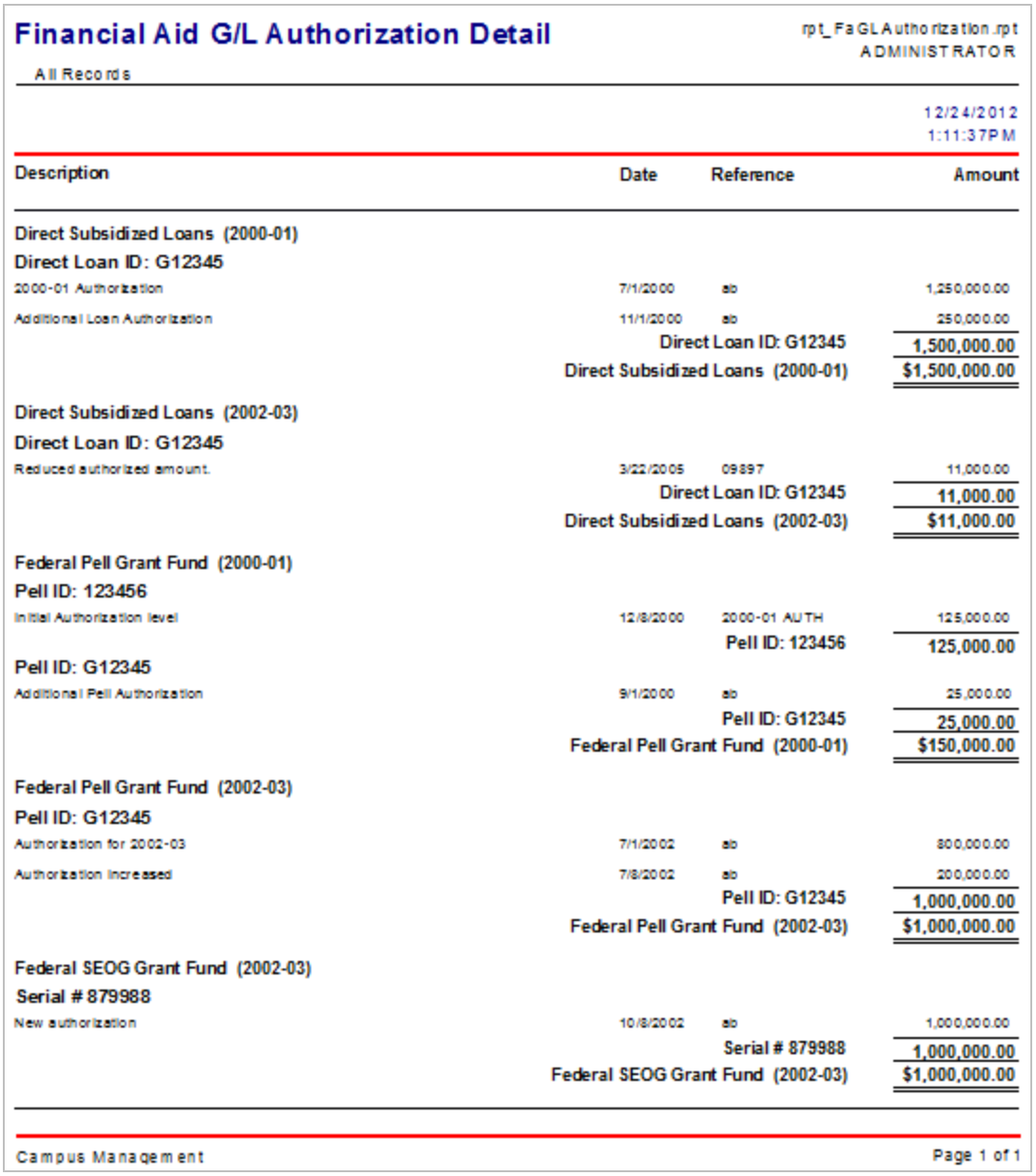


4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Description
   - Date
   - Reference
   - Amount.

Transactions are grouped and subtotaled by fund ID and award year.



Financial Aid G/L Authorization Detail

rpt_FaGLAuthorization.rpt
ADMINISTRATOR

All Records

12/24/2012
1:11:37PM

Description	Date	Reference	Amount
Direct Subsidized Loans (2000-01)			
Direct Loan ID: G12345			
2000-01 Authorization	7/1/2000	sb	1,250,000.00
Additional Loan Authorization	11/1/2000	sb	250,000.00
		Direct Loan ID: G12345	**1,500,000.00**
		Direct Subsidized Loans (2000-01)	**$1,500,000.00**
Direct Subsidized Loans (2002-03)			
Direct Loan ID: G12345			
Reduced authorized amount.	3/22/2005	09897	11,000.00
		Direct Loan ID: G12345	**11,000.00**
		Direct Subsidized Loans (2002-03)	**$11,000.00**
Federal Pell Grant Fund (2000-01)			
Pell ID: 123456			
Initial Authorization level	12/8/2000	2000-01 AUTH	125,000.00
		Pell ID: 123456	**125,000.00**
Pell ID: G12345			
Additional Pell Authorization	9/1/2000	sb	25,000.00
		Pell ID: G12345	**25,000.00**
		Federal Pell Grant Fund (2000-01)	**$150,000.00**
Federal Pell Grant Fund (2002-03)			
Pell ID: G12345			
Authorization for 2002-03	7/1/2002	sb	800,000.00
Authorization increased	7/8/2002	sb	200,000.00
		Pell ID: G12345	**1,000,000.00**
		Federal Pell Grant Fund (2002-03)	**$1,000,000.00**
Federal SEOG Grant Fund (2002-03)			
Serial # 879988			
New authorization	10/8/2002	sb	1,000,000.00
		Serial # 879988	**1,000,000.00**
		Federal SEOG Grant Fund (2002-03)	**$1,000,000.00**

Campus Management

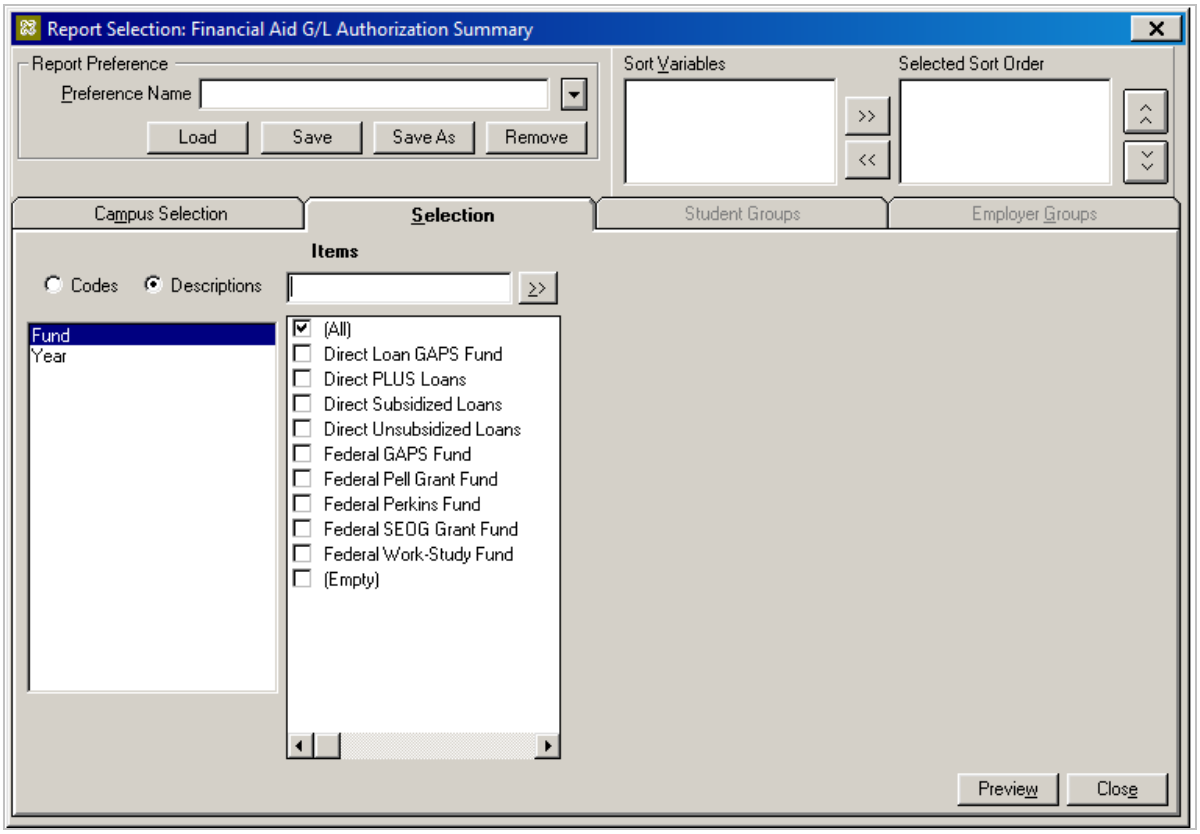
Page 1 of 1

Financial Aid G/L Authorization Summary

This report lists the status of the authorization levels in the various fund accounts in summary format.

To run the report:

1. Navigate to **Reports > Financial Aid > Financial Aid G/L Authorization Summary**. The Report Selection: Financial Aid G/L Authorization Summary form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



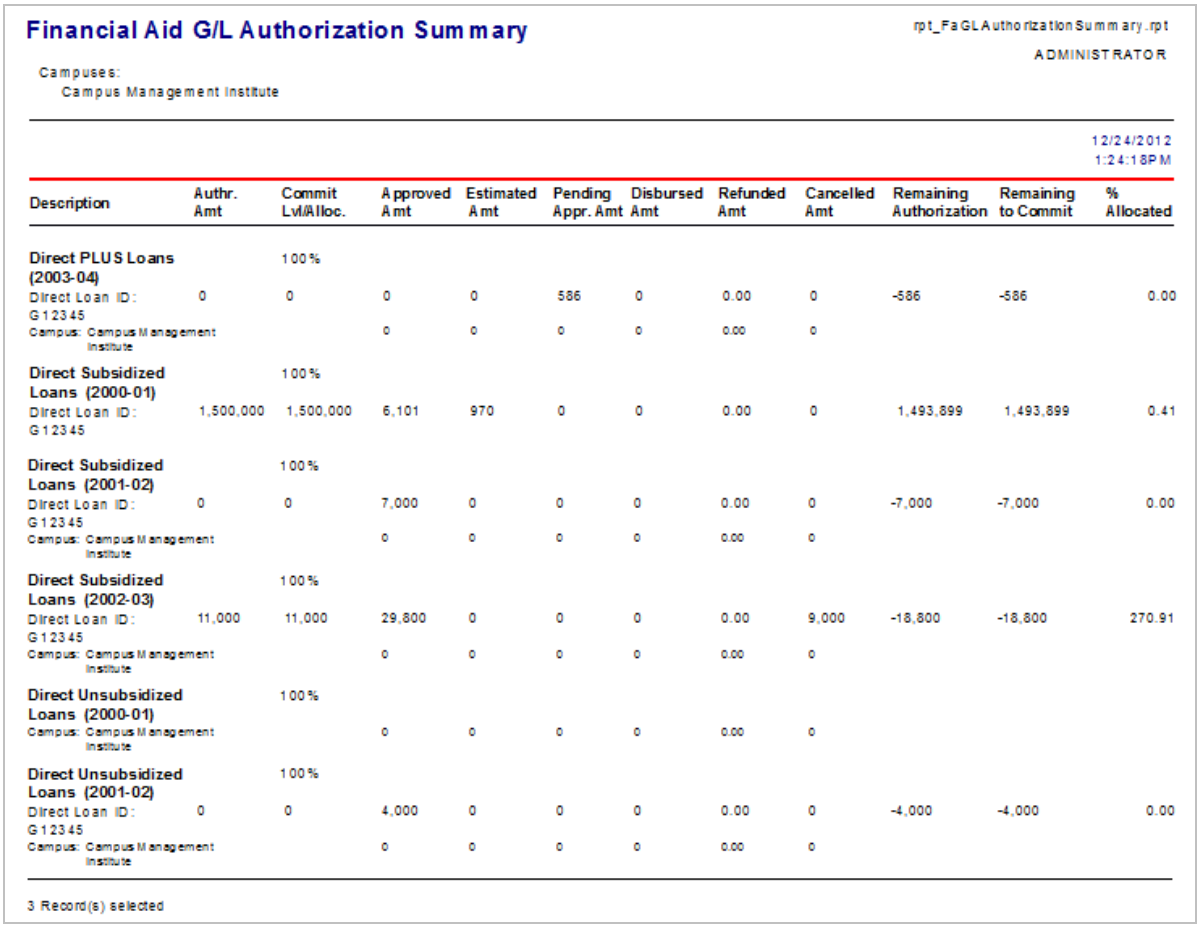
4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Description
   - Authorization Amount
   - Commitment Level
   - Approved Amount
   - Estimated Amount
   - Pending Approval Amount
   - Disbursed Amount
   - Refunded Amount
   - Cancelled Amount
   - Remaining Authorization

- Remaining to Commit,
- Allocated

Detail lines are listed by fund ID and grouped and subtotaled by fund and award year.



Financial Aid G/L Authorization Summary

rpt_FaGLAuthorizationSummary.rpt

ADMINISTRATOR

Campuses:
Campus Management Institute

12/24/2012
1:24:18PM

Description	Authr. Amt	Commit Lvl/Alloc.	Approved Amt	Estimated Amt	Pending Appr. Amt	Disbursed Amt	Refunded Amt	Cancelled Amt	Remaining Authorization	Remaining to Commit	% Allocated
Direct PLUS Loans (2003-04)		100%									
Direct Loan ID: G12345	0	0	0	0	586	0	0.00	0	-586	-586	0.00
Campus: Campus Management Institute			0	0	0	0	0.00	0			
Direct Subsidized Loans (2000-01)		100%									
Direct Loan ID: G12345	1,500,000	1,500,000	6,101	970	0	0	0.00	0	1,493,899	1,493,899	0.41
Direct Subsidized Loans (2001-02)		100%									
Direct Loan ID: G12345	0	0	7,000	0	0	0	0.00	0	-7,000	-7,000	0.00
Campus: Campus Management Institute			0	0	0	0	0.00	0			
Direct Subsidized Loans (2002-03)		100%									
Direct Loan ID: G12345	11,000	11,000	29,800	0	0	0	0.00	9,000	-18,800	-18,800	270.91
Campus: Campus Management Institute			0	0	0	0	0.00	0			
Direct Unsubsidized Loans (2000-01)		100%									
Campus: Campus Management Institute			0	0	0	0	0.00	0			
Direct Unsubsidized Loans (2001-02)		100%									
Direct Loan ID: G12345	0	0	4,000	0	0	0	0.00	0	-4,000	-4,000	0.00
Campus: Campus Management Institute			0	0	0	0	0.00	0			

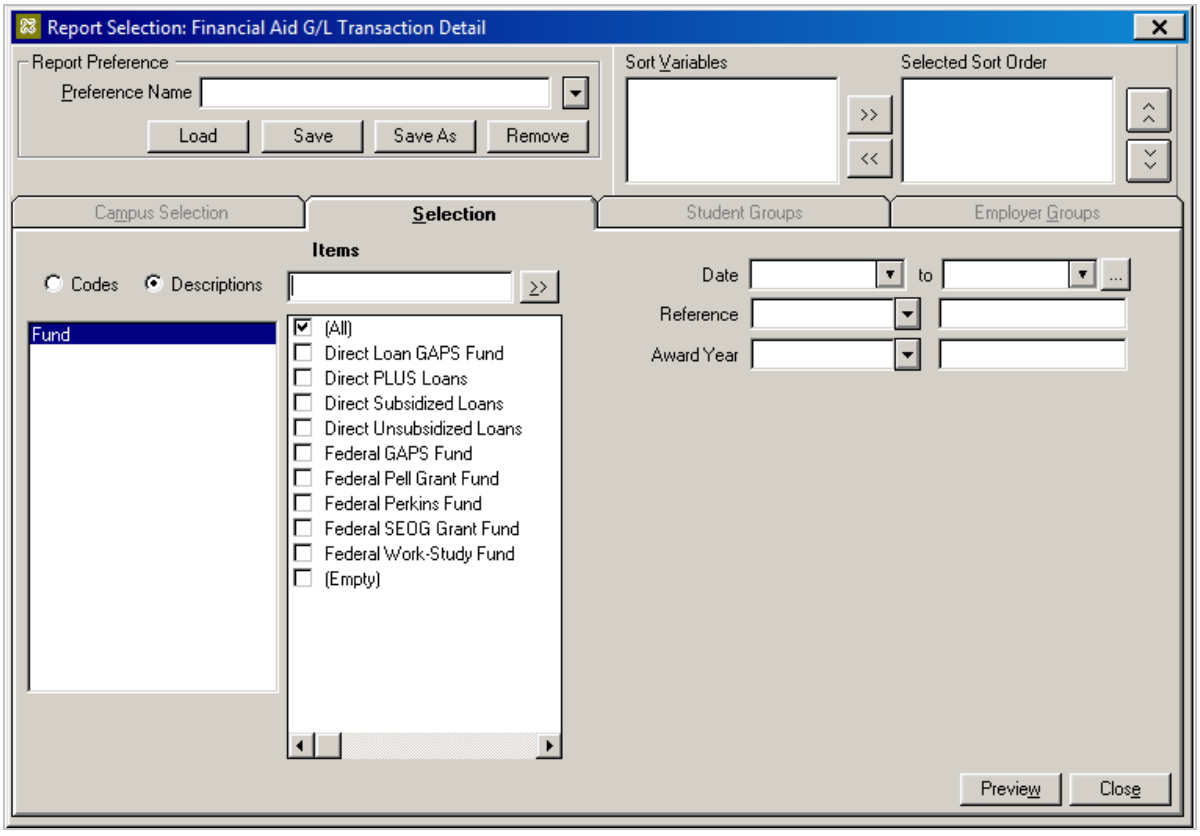
3 Record(s) selected

Financial Aid G/L Transaction Detail

This report lists transaction activity in the various fund accounts at the detail level.

To run the report:

1. Navigate to **Reports > Financial Aid > Financial Aid G/L Transaction Detail**. The Report Selection: Financial Aid G/L Transaction Detail form is displayed.
2. Select appropriate options on the Selection tab.

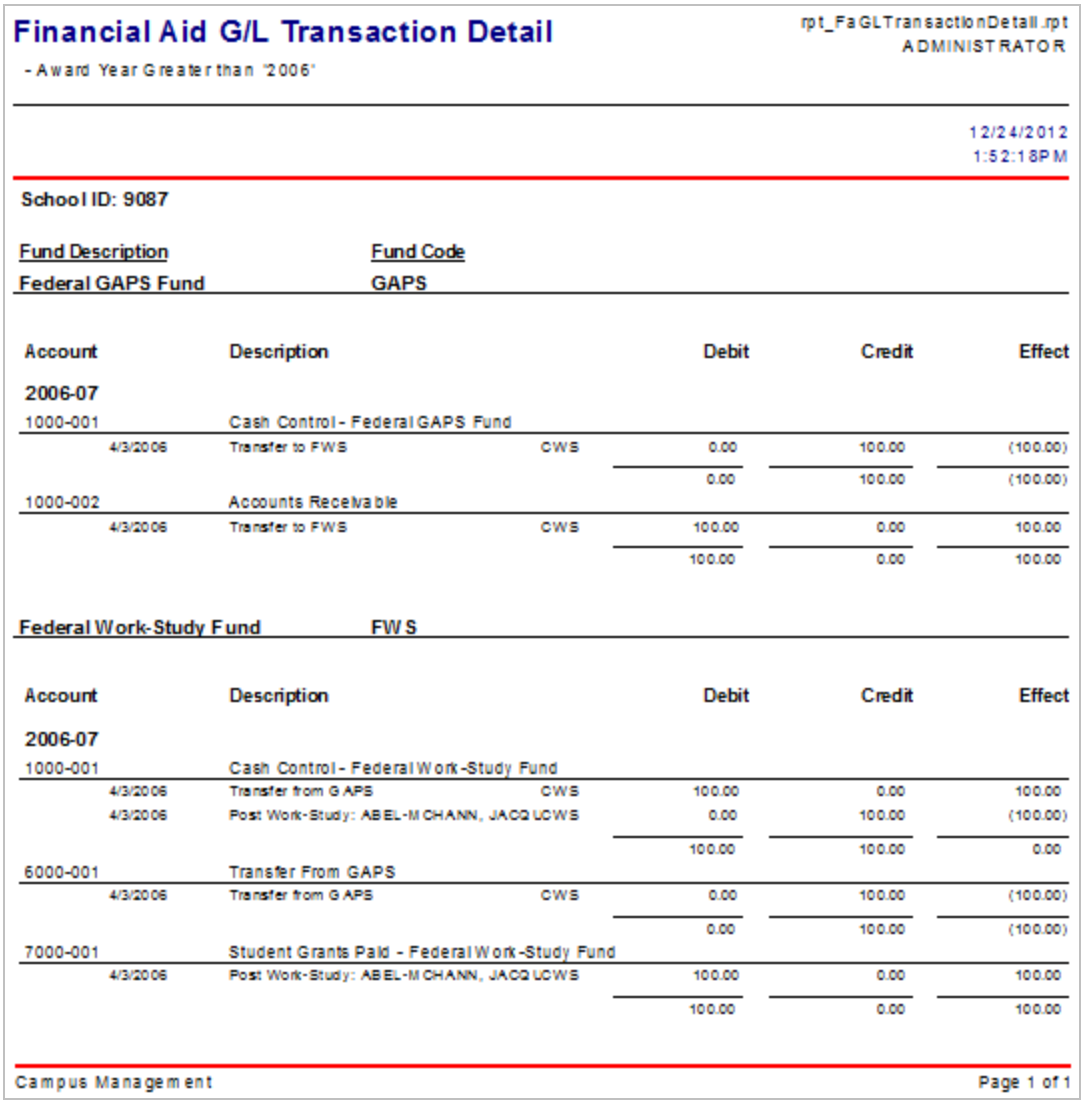


3. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Account Number
   - Date
   - Description
   - Debit Amount
   - Credit Amount
   - Effect

Transactions are grouped and subtotaled by fund, fund ID, and award year.



Financial Aid G/L Transaction Detail

rpt_FaGLTransactionDetail.rpt
ADMINISTRATOR

- Award Year Greater than '2006'

12/24/2012
1:52:18PM

School ID: 9087

Fund Description	Fund Code
Federal GAPS Fund	GAPS

Account		Description		Debit	Credit	Effect
2006-07						
1000-001		Cash Control - Federal GAPS Fund				
	4/3/2006	Transfer to FWS	CWS	0.00	100.00	(100.00)
				0.00	100.00	(100.00)
1000-002		Accounts Receivable				
	4/3/2006	Transfer to FWS	CWS	100.00	0.00	100.00
				100.00	0.00	100.00

Federal Work-Study Fund	FWS

Account		Description		Debit	Credit	Effect
2006-07						
1000-001		Cash Control - Federal Work-Study Fund				
	4/3/2006	Transfer from GAPS	CWS	100.00	0.00	100.00
	4/3/2006	Post Work-Study: ABEL-MCHANN, JACQUCWS		0.00	100.00	(100.00)
				100.00	100.00	0.00
6000-001		Transfer From GAPS				
	4/3/2006	Transfer from GAPS	CWS	0.00	100.00	(100.00)
				0.00	100.00	(100.00)
7000-001		Student Grants Paid - Federal Work-Study Fund				
	4/3/2006	Post Work-Study: ABEL-MCHANN, JACQUCWS		100.00	0.00	100.00
				100.00	0.00	100.00

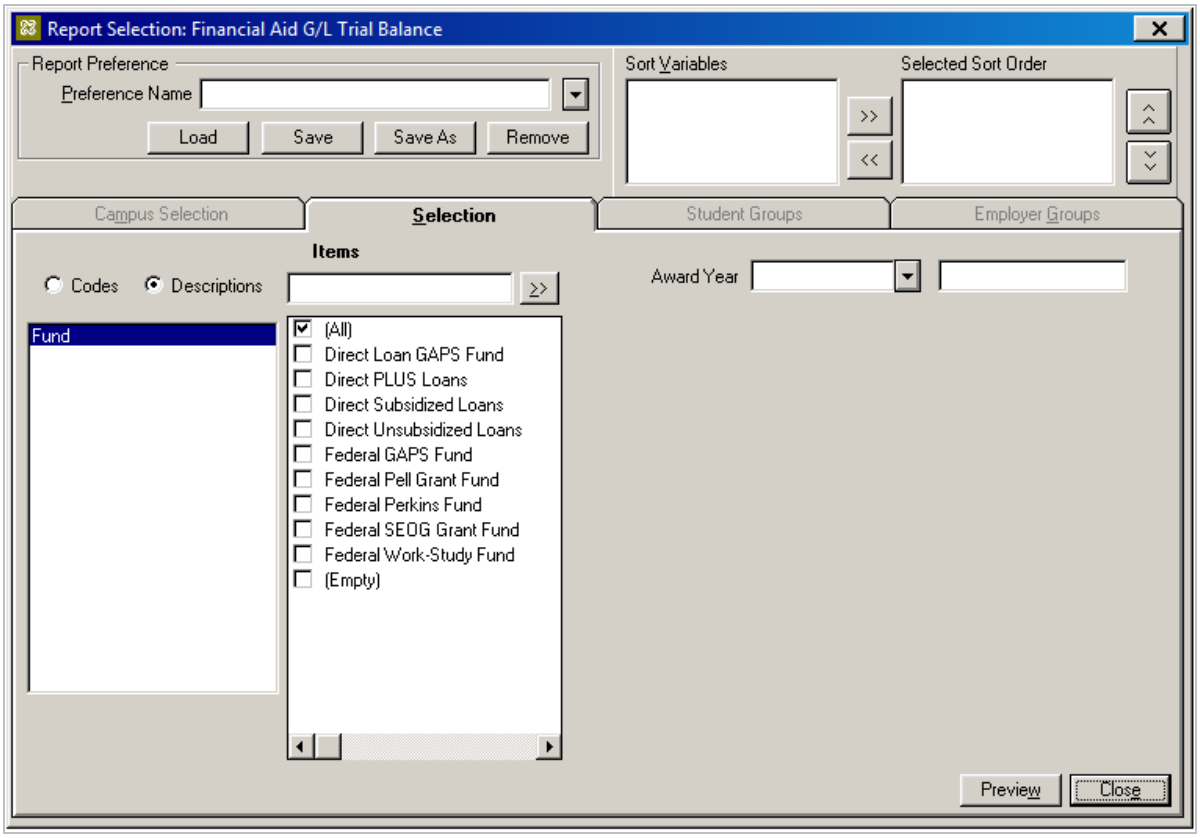
Campus Management — Page 1 of 1

Financial Aid G/L Trial Balance

This report lists balances in the various fund accounts at the summary level.

To run the report:

1. Navigate to **Reports > Financial Aid > Financial Aid G/L Trial Balance**. The Report Selection: Financial Aid G/L Trial Balance form is displayed.
2. Select appropriate options on the Selection tab.

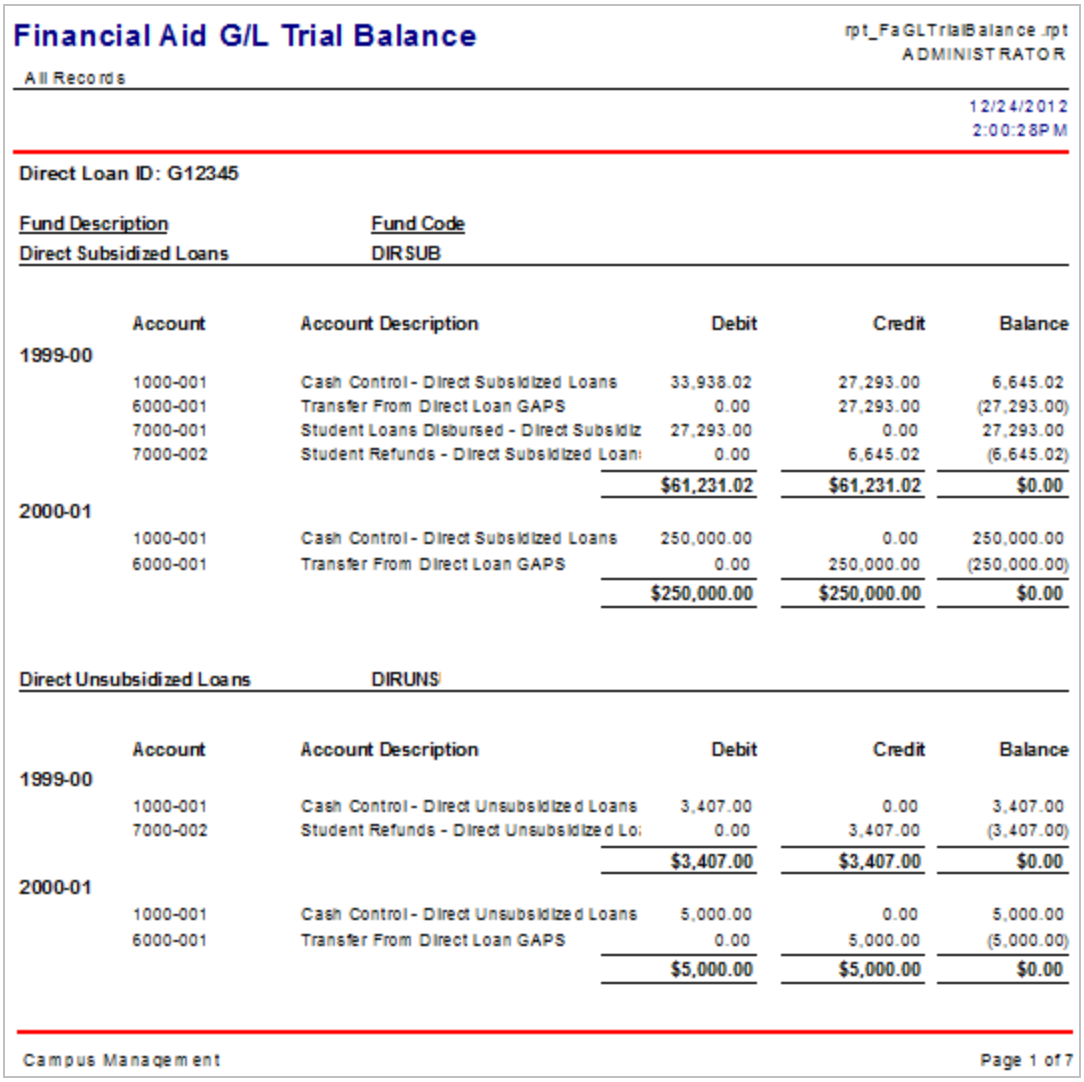


3. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Award Year
   - Account Number
   - Account Description
   - Debit Amount
   - Credit Amount
   - Balance

Detail lines are grouped and subtotaled by fund.



Financial Aid G/L Trial Balance

rpt_FaGLTrialBalance.rpt
ADMINISTRATOR

All Records

12/24/2012
2:00:28PM

Direct Loan ID: G12345

Fund Description	Fund Code
Direct Subsidized Loans	DIRSUB

	Account	Account Description	Debit	Credit	Balance
1999-00					
	1000-001	Cash Control - Direct Subsidized Loans	33,938.02	27,293.00	6,645.02
	6000-001	Transfer From Direct Loan GAPS	0.00	27,293.00	(27,293.00)
	7000-001	Student Loans Disbursed - Direct Subsidiz	27,293.00	0.00	27,293.00
	7000-002	Student Refunds - Direct Subsidized Loan	0.00	6,645.02	(6,645.02)
			$61,231.02	**$61,231.02**	**$0.00**
2000-01					
	1000-001	Cash Control - Direct Subsidized Loans	250,000.00	0.00	250,000.00
	6000-001	Transfer From Direct Loan GAPS	0.00	250,000.00	(250,000.00)
			$250,000.00	**$250,000.00**	**$0.00**

Direct Unsubsidized Loans	DIRUNS

	Account	Account Description	Debit	Credit	Balance
1999-00					
	1000-001	Cash Control - Direct Unsubsidized Loans	3,407.00	0.00	3,407.00
	7000-002	Student Refunds - Direct Unsubsidized Lo	0.00	3,407.00	(3,407.00)
			$3,407.00	**$3,407.00**	**$0.00**
2000-01					
	1000-001	Cash Control - Direct Unsubsidized Loans	5,000.00	0.00	5,000.00
	6000-001	Transfer From Direct Loan GAPS	0.00	5,000.00	(5,000.00)
			$5,000.00	**$5,000.00**	**$0.00**

Campus Management

Page 1 of 7

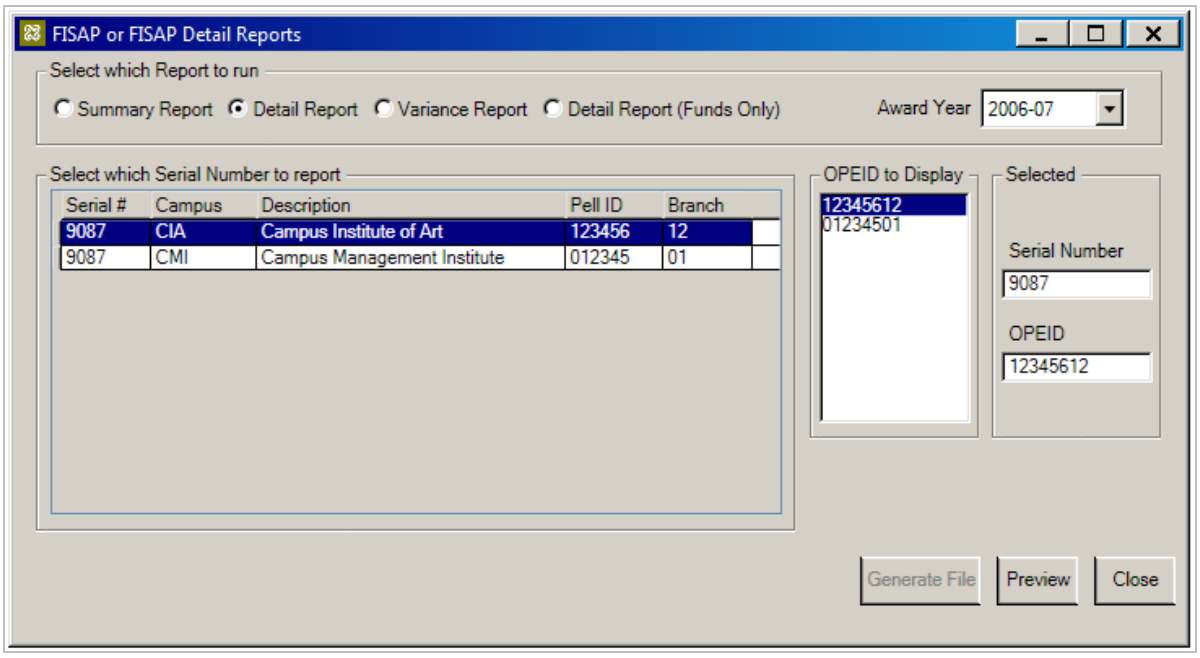
FISAP or FISAP Detail Reports

The FISAP or FISAP Detail Reports form allows you to preview and print a summary or detailed report for the selected award year by selecting the school, based upon serial number, and the OPEID of the affiliated campus. Refer to the FISAP Data Correction Tool in Regulatory Help for additional information.

The Fiscal Operations to Report and Application to Participate (FISAP) requirements are outlined by the Department of Education. For detailed information on preparation of FISAP, visit: https://ifap.ed.gov/ifap/.

To run the report:

1. Navigate to **Reports > Financial Aid > FISAP or FISAP Detail Reports**. The FISAP or FISAP Detail Reports form is displayed.



2. From the 'Select Which Report to run' section, choose one of the following options:
   - **Summary Report** – to run a FISAP summary report
   - **Detail Report** – to run a detailed report with a listing of individual students
   - **Variance Report** – to show the variance between FISAP detail report and the Cash Receipt detail report from Student Accounts
   - **Detail Report (Funds Only)** – to run a detailed report of only those students who received funds
3. Select the applicable **Award Year** from the drop-down list.
4. From the 'Select which Serial Number to report' section, select the **Serial #** of the school.

   The OPEID to Display appears when a selection has been made.

   Note: Stand-alone schools and branch numbers of a main campus are typically 00. In exceptional cases a different numbering convention is used when a school is acquired by another school.
5. From the 'OPEID to Display' section, choose the **OPEID** of the affiliated campus.

The OPEID and Serial Number fields appear.

Note: CampusNexus Student uses the combination of school code (also known as Pell ID) and branch number to create the OPEID.

6. For FISAP Detail Reports post-2010 ONLY:

   Click **Generate file**. A dialog box is displayed, enabling you to save the FISAP Detail Report as a file that can be exported to Excel.

   – OR –

   Click **Preview**. The report is assembled and displayed in the Report Viewer.

   A report for the following academic year display 'Draft' in the header.

7. Click **Close** to close the form.

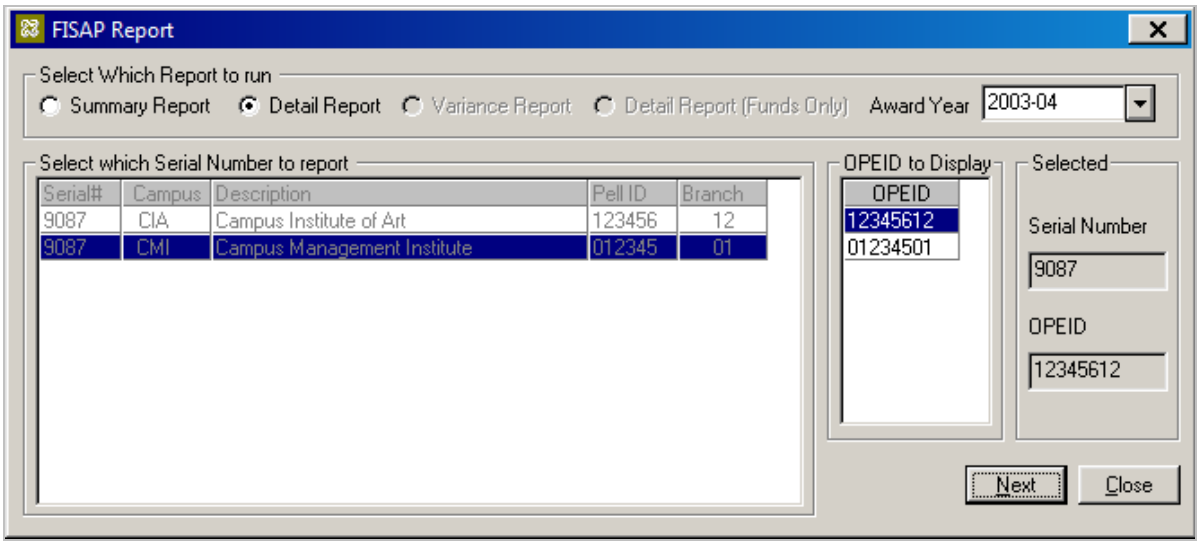
FISAP or FISAP Detail Reports (Prior to 2005-06)

The FISAP Report form allows you to preview and print a summary or detailed report for the selected award year by selecting the school, based upon serial number, and the U.S. Department of Education's Office of Postsecondary Education Identification (OPEID) of the affiliated campus. Refer to ' FISAP Data Correction Tool' in Regulatory Help for additional information.

The Fiscal Operations to Report and Application to Participate (FISAP) requirements are outlined by the Department of Education. For detailed information on preparation of FISAP, visit: https://ifap.ed.gov/ifap/.

To run the report:

1. Navigate to **Reports > Financial Aid > FISAP or FISAP Detail Reports (Prior to 2005-06)**. The FISAP Report form is displayed.



2. From the 'Select Which Report to run' section, choose one of the following radio buttons.
   - **Summary Report** – to run a FISAP summary report
   - **Detail Report** – to run a detailed report with a listing of individual students
   - **Variance Report** – to run a report on the variance between the FISAP detail report and the Cash Receipt detail report from Student Accounts
   - **Detail Report (Funds Only)** – to run a detailed report of only those students who received funds
3. Select the applicable **Award Year** from the drop-down list.
4. From the 'Select which Serial Number to report' section, select the **Serial #** of the school. The 'OPEID to Display' appears when a selection is made.

   Note: Stand-alone schools and branch numbers of a main campus are typically 00. In exceptional cases a different numbering convention is used when a school is acquired by another school.
5. From the OPEID to Display section, choose the **OPEID** of the affiliated campus. The OPEID and Serial Number fields appear.

Note: CampusNexus Student uses the combination of school code (also known as Pell ID) and branch number to create the OPEID.

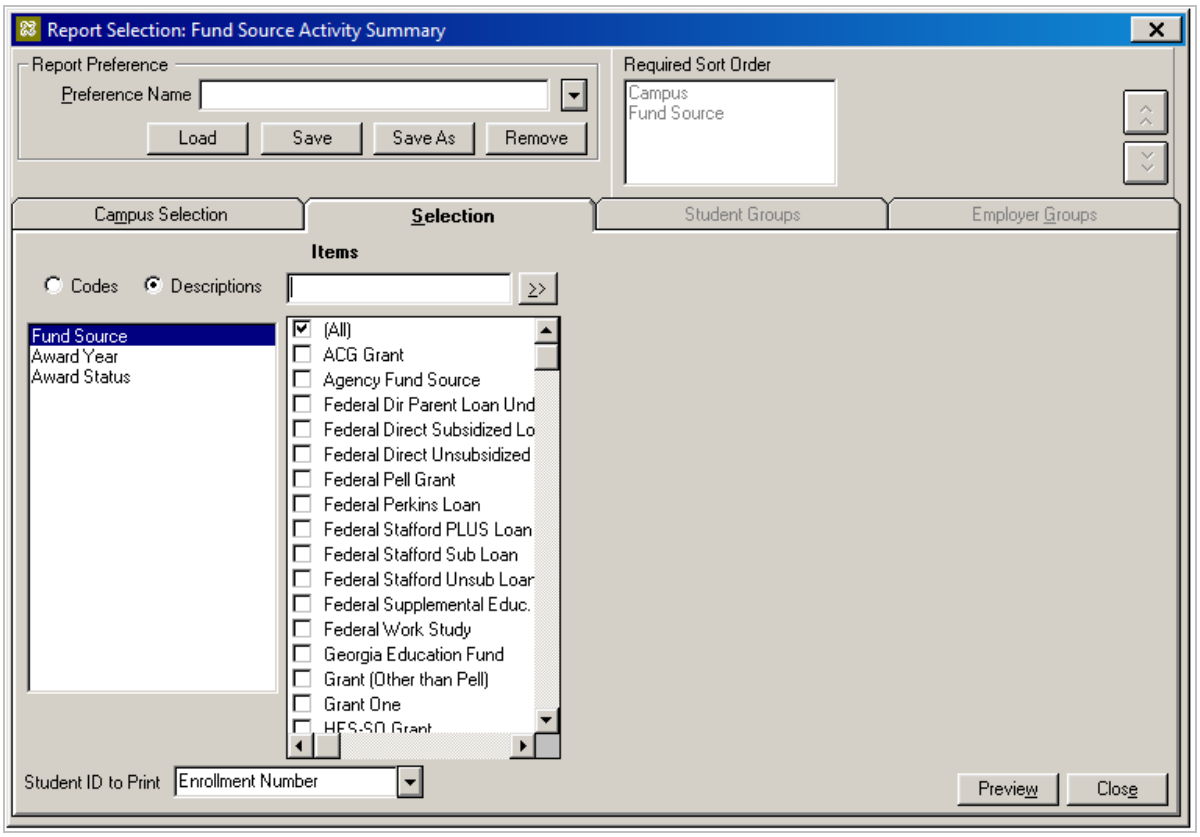
6. Click **Preview**. The report is assembled and displayed in the Report Viewer.

Fund Source Activity Summary Report

This report provides a summary of fund sources, number of students and awards, and amounts awarded, received, refunded, and voided.

To run the report:

1. Navigate to **Reports > Financial Aid > Fund Source Activity Summary Report**. The Report Selection: Fund Source Activity Summary Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

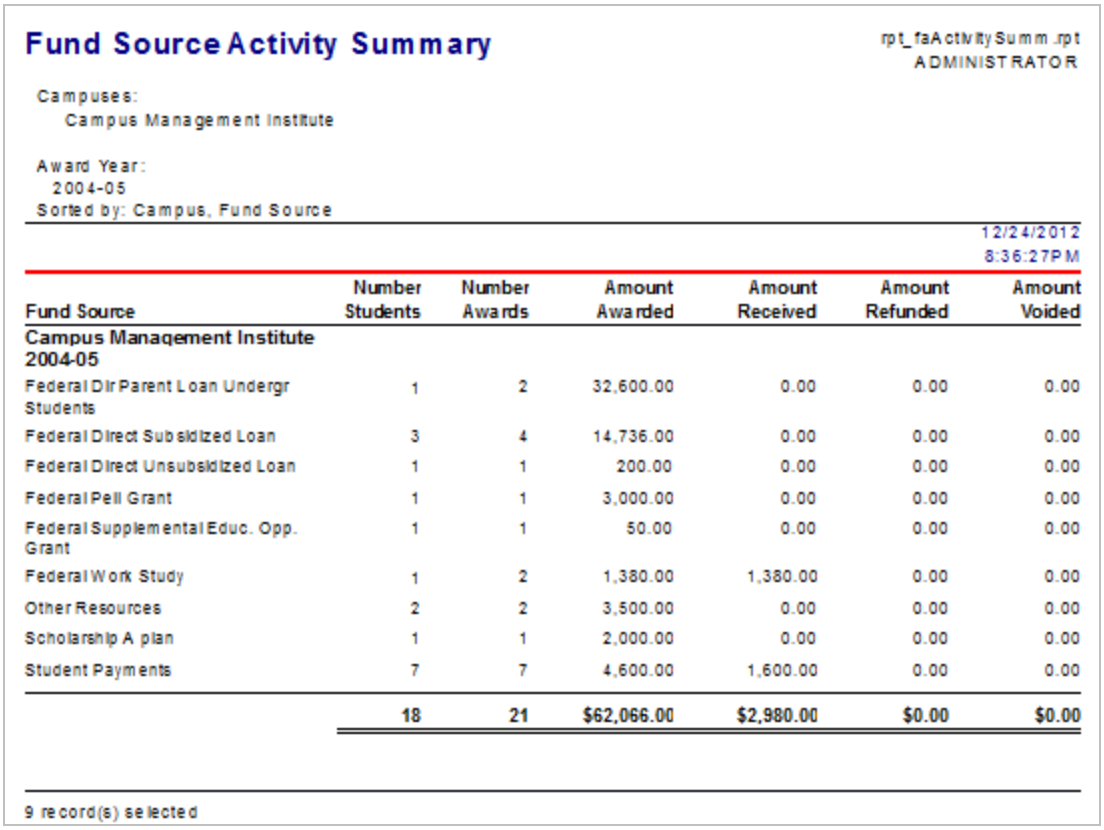


4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Fund Source
   - Number of Students
   - Number of Awards
   - Amount Awarded
   - Amount Received
   - Amount Refunded

- Amount Voided



Fund Source Activity Summary

rpt_faActivitySumm.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute

Award Year:
2004-05
Sorted by: Campus, Fund Source

12/24/2012
8:36:27PM

Fund Source	Number Students	Number Awards	Amount Awarded	Amount Received	Amount Refunded	Amount Voided
Campus Management Institute 2004-05						
Federal Dir Parent Loan Undergr Students	1	2	32,600.00	0.00	0.00	0.00
Federal Direct Subsidized Loan	3	4	14,736.00	0.00	0.00	0.00
Federal Direct Unsubsidized Loan	1	1	200.00	0.00	0.00	0.00
Federal Pell Grant	1	1	3,000.00	0.00	0.00	0.00
Federal Supplemental Educ. Opp. Grant	1	1	50.00	0.00	0.00	0.00
Federal Work Study	1	2	1,380.00	1,380.00	0.00	0.00
Other Resources	2	2	3,500.00	0.00	0.00	0.00
Scholarship A plan	1	1	2,000.00	0.00	0.00	0.00
Student Payments	7	7	4,600.00	1,600.00	0.00	0.00
	18	**21**	**$62,066.00**	**$2,980.00**	**$0.00**	**$0.00**

9 record(s) selected

HOPE Evaluation Report

This report lists each student with HOPE and Zell Miller Scholarships and GPA. The HOPE Scholarship and Zell Miller Scholarship has four stages, or tiers, throughout the student's program.

1. Student has attempted 1 - 29 credit hours
2. Student has attempted 30 - 59 credit hours
3. Student has attempted 60 - 89 credit hours
4. Student has attempted 90 - 127 credit hours

The students are also evaluated at benchmark terms. This report addresses the Spring Term, 30, 60, and 90 credit hours attempted benchmark values.

The GPAs reported are based upon the benchmark that the student has reached. The 'As of Date' defaults to the current date and provides the most current HOPE GPA for each student for all terms completed before the current date. When the 'As of Date' is changed, the report calculates the GPA up to the date specified.

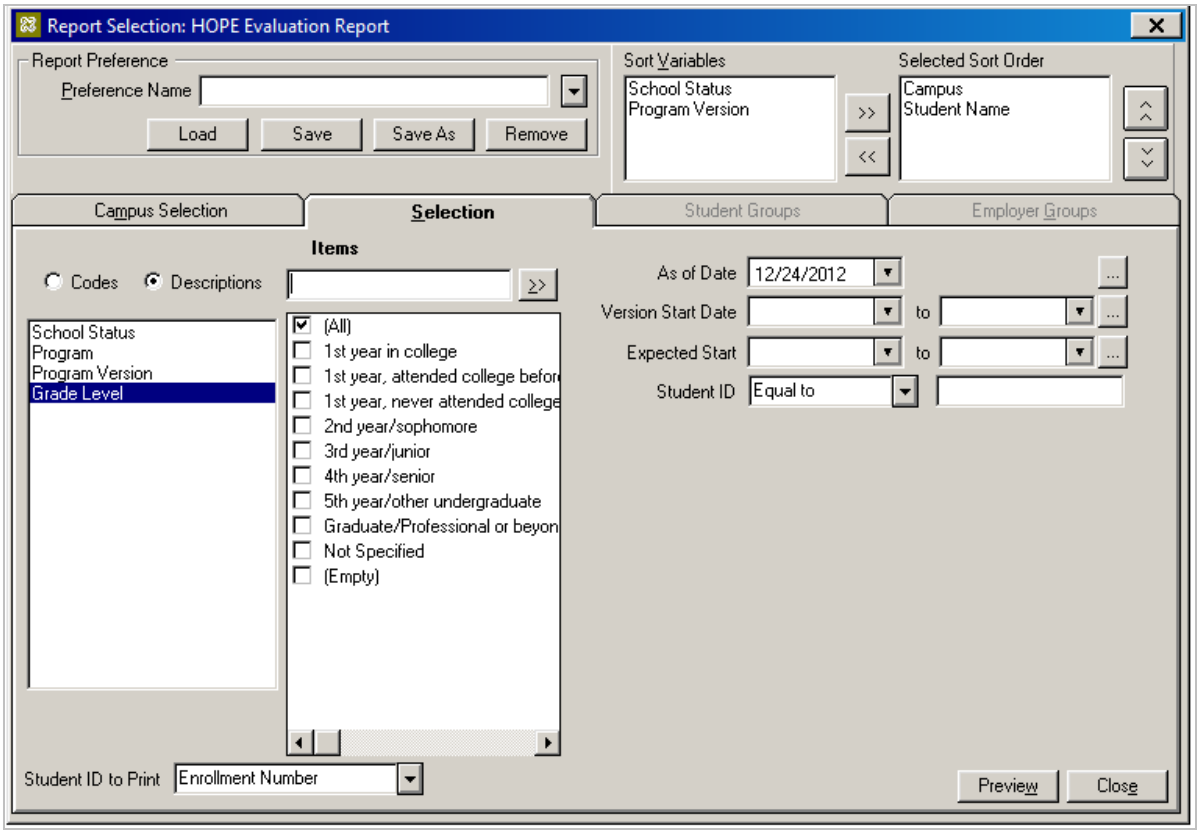
For transfer students, the Benchmark Spring term calculation logic calculates transfer credits and GPA on the basis of Transfer Status and Type configuration. The values are then stored in the database.

The HOPE Evaluation Report considers transfer credits on active and inactive terms while evaluating benchmarks. If a benchmark is not achieved within a registered term, the system reviews the student's transfer credits to evaluate if a benchmark 30, 60, or 90 is achieved. For the course that reaches the achieved benchmark, the report displays the Completion Date.

To run the report:

1. Navigate to **Reports > Financial Aid > HOPE Evaluation Report**. The Report Selection: HOPE Evaluation Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Note: If no report selections are made, the report lists all students with HOPE and Zell Miller Scholarships (using the fund sources that are configured in the Georgia State Configuration Tool on the Fund Source mapping tab). When report selections are made, students who do not meet the selection criteria, are filtered out of the report.



4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Term End Date when the most recent benchmark has been reached
   - Number of Credits completed for a particular benchmark
   - Cumulative HOPE GPA
   - Award Amount
   - Disbursements
   - Dates
   - Status
   - Amounts

HOPE Summary Report

This report provides historical HOPE Scholarship awarding information. Each student with HOPE and Zell Miller Scholarships with their respective HOPE GPA is listed on the report.

The HOPE and Zell Miller Scholarships have four stages, or tiers, throughout the students program:

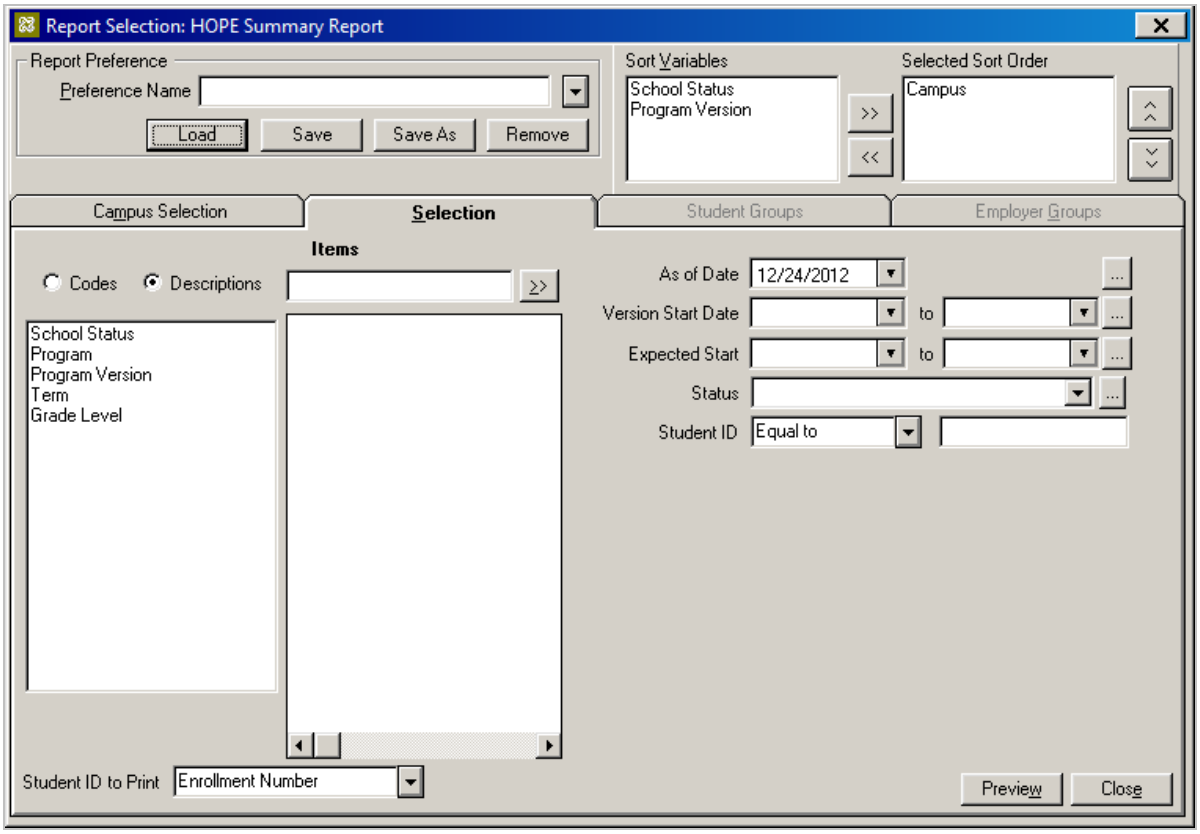
1. Student has attempted 1- 29 credit hours
2. Student has attempted 30 - 59 credit hours
3. Student has attempted 60 - 89 credit hours
4. Student has attempted 90 - 127 credit hours

The evaluation benchmarks for this report are 30, 60, and 90.

To run the report:

1. Navigate to **Reports > Financial Aid > HOPE Summary Report**. The Report Selection: HOPE Summary Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Note: If no report selections are made, the report lists all students with HOPE and Zell Miller Scholarships (using the fund sources that are configured in the Georgia State Configuration Tool on the Fund Source mapping tab). When report selections are made, students who do not meet the selection criteria are filtered out of the report.



4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

The report displays the following details:

- Term End Date when the most recent benchmark has been reached
- Number of Credits completed for a particular benchmark
- Cumulative HOPE GPA
- Award Amount
- Disbursements
- Dates
- Status
- Amounts

The report only displays and evaluates matching terms in the HOPE GPA to the terms configured in the Georgia State Configuration Tool on the Term Mapping tab.

ISIR Summary Report

This report contains processed application and correction information (i.e., comment codes) for Institutional Student Information Record (ISIR) data.

For CampusNexus Student 13.1, the ISIR comment codes related to the new Pell Grant Lifetime Eligibility Units (LEU) regulations are now in the Pell Lifetime Limit column:

- 345 (High Pell percentage)
- 346 (Pell percentage close to Pell LEU limit)
- 347 (Meet or exceed Pell LEU limit)
- 348 (No longer a problem)

If the Pell Lifetime Limit column is blank, it means the student has not come close enough to a Pell LEU limit to cause a comment code to be generated.

More information about Pell LEU regulations can be found here: Pell LEU Regulations.

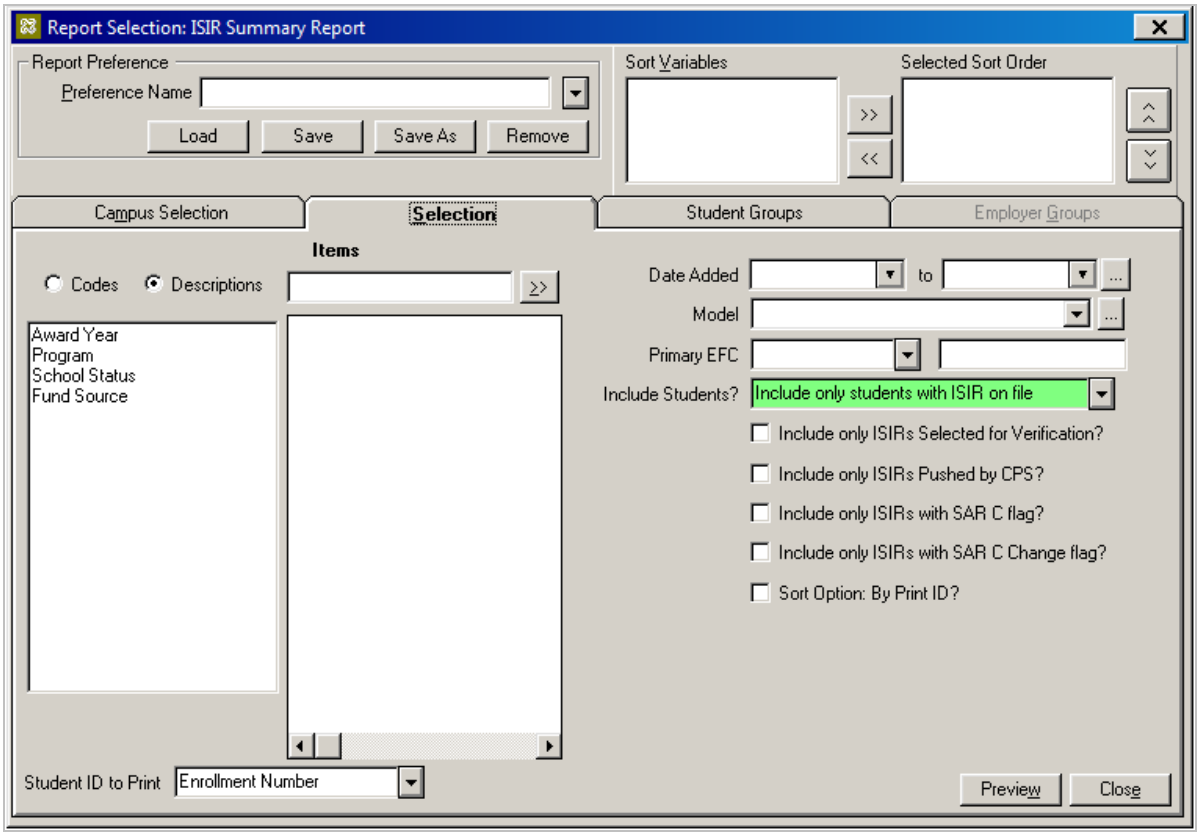
A school resolution is required if a C code (C-Flag, comment code, correction code) is displayed is the report.

To run the report:

1. Navigate to **Reports > Financial Aid > ISIR Summary Report**. The Report Selection: ISIR Summary Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   The Include Students? drop-down list is particularly useful when you are trying to reconcile Pell funds for a given year.

   - If you select **Include only students with ISIR on file**, the system uses the selection criteria to return the students having ISIRs.
   - If you select **Include only students without ISIR on file**, the report does not use the other selection criteria for the students being returned that do not have ISIRs.
   - If you select **All Students**, the system uses the selection criteria on the students having ISIRs and does not use the selection criteria to return the students without ISIRs.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Student ID
   - Transaction ID
   - PEFC
   - Verification
   - Verification Complete
   - Date ISIR Received
   - Pell Eligibility
   - Pell Lifetime Limit (Pell LEU)
   - SAR C Flag
   - SAR C Change Flag
   - CPS Pushed ISIR Flag
   - Model
   - Professional Judgment.

ISIR Summary Report

rpt_FaISIRSummary.rpt
ADMINISTRATOR

Date Added between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Model In
D, I, X, Y
Include only ISIRs Selected for Verification? : No
Include only ISIRs Pushed by CPS? : No
Include only ISIRs with SAR C flag? : No
Include only ISIRs with SAR C Change flag? : No
Sort Option: By Print ID? : No
Campuses:
Campus Management Institute

Include Students:
Include only students with ISIR on file

12/25/2012
4:23:50 PM

Student Name	Student ID	Transaction ID	PEFC	Verification	Verification Complete	Date ISIR Received	Pell Eligibility	Pell Lifetime Limit	Sar C Flag	Sar C Change Flag	CPS Pushed ISIR Flag	Model	Professional Judgment
Campus Management Institute													
2000-01													
AMIRI BARAKA	142	069987246BA01	99999	No		3/2/2000	N/A		Yes			Independent	No
ROSS BAYLER	145	076289824BA01	01705	Yes		3/2/2000	Yes		Yes			Independent	No
HUMPHREY BOGART	155	236010011BO01	36800	No		3/2/2000	N/A		Yes			Independent	No
FULLFIRST D'3876543210	175	236010005D01		N/A		3/2/2000	N/A		Yes			Independent rejected, no EFC calculated	No
CLOUD FUTE	177	236010046FL01	00000	Yes		3/2/2000	Yes		Yes			Dependent	No
ANAFLYYOU WAY	158	236010015FL01		N/A		3/2/2000	N/A		Yes			Independent rejected, no EFC calculated	No
ELMER FUDD	157	236010014FU01		N/A		3/2/2000	N/A		Yes			Independent rejected, no EFC calculated	No
OUT GIRLS NIGHT	160	236010017GI01		N/A		3/2/2000	N/A		Yes			Independent rejected, no EFC calculated	No
LINDAMAY HIGGINS	139	472981234HI01	04989	No		3/2/2000	N/A		Yes			Independent	No
MARTY I DIDN'T KNOW	173	236010028I 01	00452	Yes		3/2/2000	Yes		Yes			Dependent	No
CANDY JACKSON	144	076229870JA01	20529	No		3/2/2000	N/A		Yes			Independent	No
ADDISON LIGHTING	154	236010010LI01	99999	No		3/2/2000	N/A		Yes			Independent	No

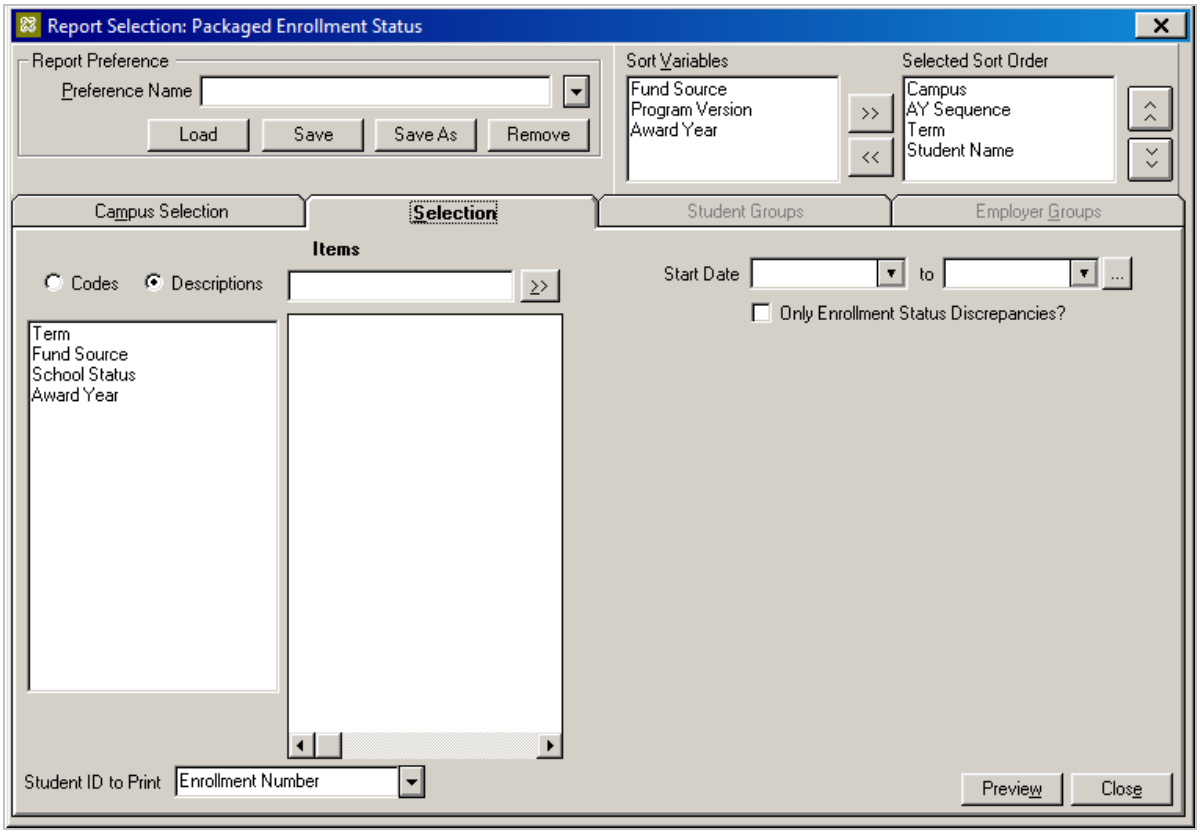
Packaged Enrollment Status

This report is used to identify courses that a student never attended, but which are charged and are on the official transcript. If a student has registered for a course, and then never attends that course, some aid may need to be reduced. Even though the school may still charge the student for the course, the student may not receive Federal Aid for that course. If not counting that course drops a Pell Grant recipient below full time, the school needs to adjust the Pell Grant. The Packaged Enrollment Status report allows you to determine if an adjustment is needed for a student.

You can also generate a report when there is a discrepancy with the student's packaged status with respect to the current enrollment status.

To run the report:

1. Navigate to **Reports > Financial Aid > Packaged Enrollment Status**. The Report Selection: Packaged Enrollment Status form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



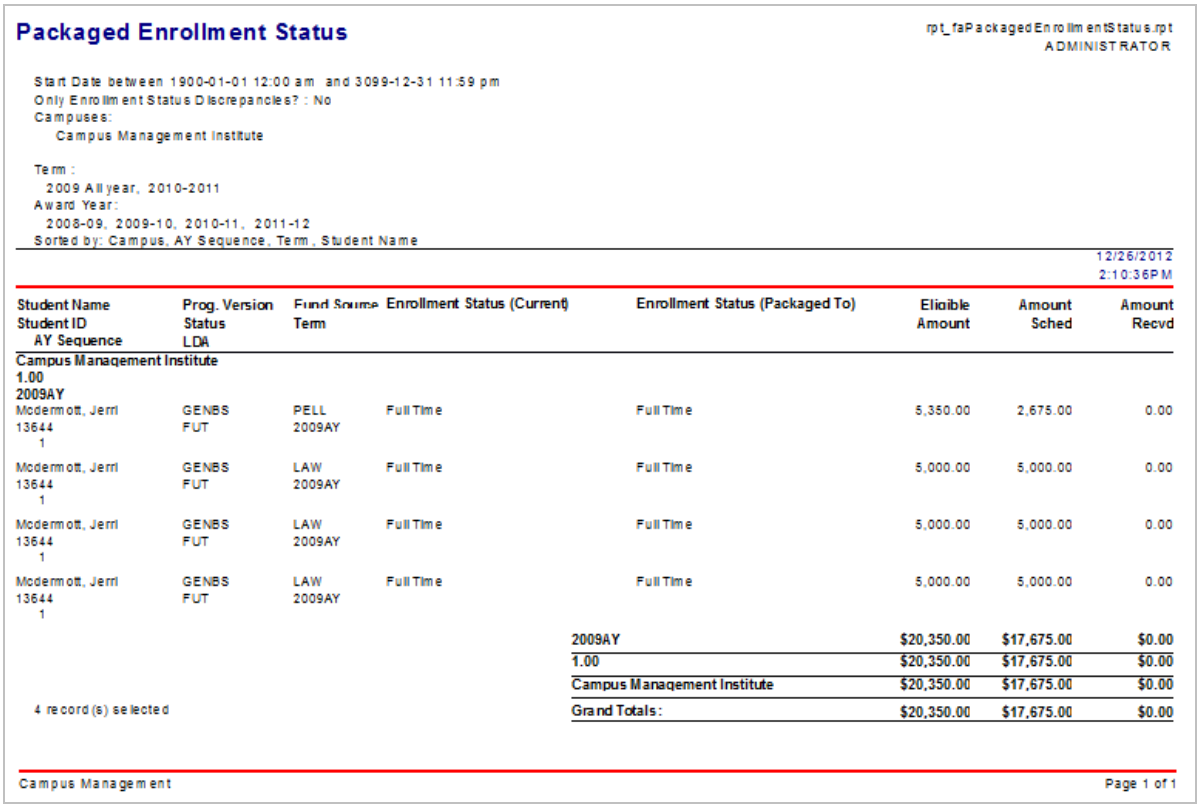
4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Student ID
   - Academic Year Sequence
   - Program Version

- Status
- Last Date Attended (LDA)
- Fund Source
- Term
- Enrollment Status (Current)
- Enrollment Status (Packaged to)
- Eligible Amount for the fund source
- Scheduled amount
- Amount received

The amounts are totaled. The Net Amount calculation excludes canceled disbursements and displays the adjusted Net Amount.



Packaged Enrollment Status

rpt_faPackagedEnrollmentStatus.rpt
ADMINISTRATOR

Start Date between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Only Enrollment Status Discrepancies? : No
Campuses:
Campus Management Institute

Term :
2009 All year, 2010-2011
Award Year:
2008-09, 2009-10, 2010-11, 2011-12
Sorted by: Campus, AY Sequence, Term, Student Name

12/26/2012
2:10:36PM

Student Name / Student ID / AY Sequence	Prog. Version / Status / LDA	Fund Source / Term	Enrollment Status (Current)	Enrollment Status (Packaged To)	Eligible Amount	Amount Sched	Amount Recvd
Campus Management Institute							
1.00							
2009AY							
Mcdermott, Jerri	GENBS	PELL	Full Time	Full Time	5,350.00	2,675.00	0.00
13644	FUT	2009AY					
1							
Mcdermott, Jerri	GENBS	LAW	Full Time	Full Time	5,000.00	5,000.00	0.00
13644	FUT	2009AY					
1							
Mcdermott, Jerri	GENBS	LAW	Full Time	Full Time	5,000.00	5,000.00	0.00
13644	FUT	2009AY					
1							
Mcdermott, Jerri	GENBS	LAW	Full Time	Full Time	5,000.00	5,000.00	0.00
13644	FUT	2009AY					
1							
				2009AY	**$20,350.00**	**$17,675.00**	**$0.00**
				1.00	**$20,350.00**	**$17,675.00**	**$0.00**
				Campus Management Institute	**$20,350.00**	**$17,675.00**	**$0.00**
4 record(s) selected				**Grand Totals:**	**$20,350.00**	**$17,675.00**	**$0.00**

Campus Management
Page 1 of 1

Packaging Summary

This report summarizes the financial aid packaging data for student enrollments.

To run the report:

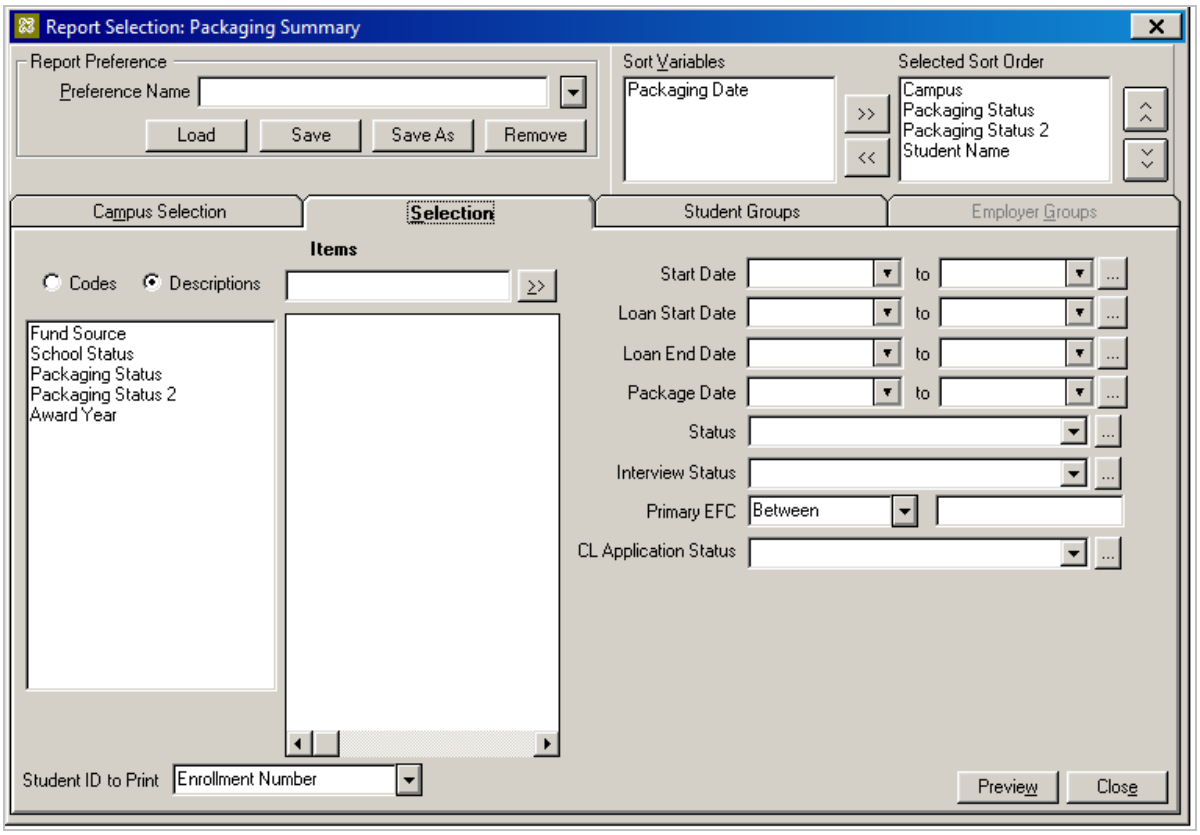
1. Navigate to **Reports > Financial Aid > Packaging Summary**. The Report Selection: Packaging Summary form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Note: The Student Name must be the final sort element.

   Comparison variables include start date, loan start date, loan end date and Primary EFC (PEFC).

   The status options are:

   - A = Initial processing successful, guarantee or obtain guarantee upon receipt of the promissory note
   - I = Initial processing successful, pending further approval
   - G = Guaranteed
   - B = Guaranteed, promissory note received and approved for disbursement
   - P = Pending processing (error resolution underway by sending organization)
   - D = Denied/rejected/incomplete; no further processing unless school, borrower, or lender provides updated data



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

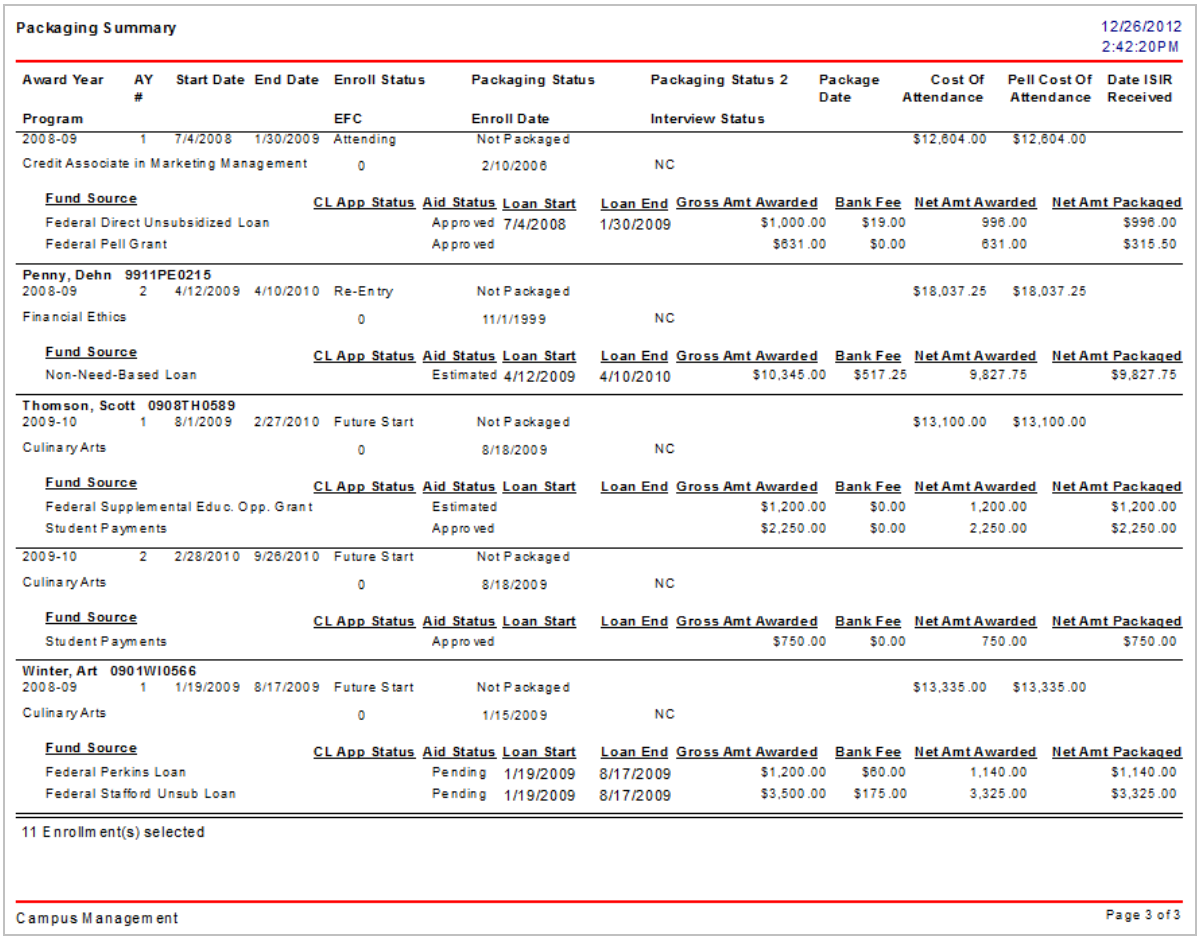
   For each student enrollment, the report shows the following information:

   - Award Year
   - Program
   - Academic Year
   - Start and end dates
   - Enrollment date
   - Enrollment status
   - Packaging status
   - Packaging date
   - Interview status
   - Cost of attendance
   - Date ISIR received
   - EFC
   - Pell cost of attendance.

   Within each award year, the report shows the following information:

   - Fund sources
   - CL Application status
   - Aid status
   - Loan start date
   - Loan end date
   - Gross amount awarded
   - Net amount packaged

   The Net Amount Packaged calculation excludes canceled disbursements and displays the adjusted Net Amount Packaged on the report.



Packaging Summary 12/26/2012 2:42:20PM

Award Year	AY #	Start Date	End Date	Enroll Status	Packaging Status	Packaging Status 2	Package Date	Cost Of Attendance	Pell Cost Of Attendance	Date ISIR Received
Program				EFC	Enroll Date	Interview Status				
2008-09	1	7/4/2008	1/30/2009	Attending	Not Packaged			$12,604.00	$12,604.00	
Credit Associate in Marketing Management				0	2/10/2006	NC				

Fund Source	CL App Status	Aid Status	Loan Start	Loan End	Gross Amt Awarded	Bank Fee	Net Amt Awarded	Net Amt Packaged
Federal Direct Unsubsidized Loan		Approved	7/4/2008	1/30/2009	$1,000.00	$19.00	996.00	$996.00
Federal Pell Grant		Approved			$631.00	$0.00	631.00	$315.50

Penny, Dehn 9911PE0215

2008-09	2	4/12/2009	4/10/2010	Re-Entry	Not Packaged			$18,037.25	$18,037.25	
Financial Ethics				0	11/1/1999	NC				

Fund Source	CL App Status	Aid Status	Loan Start	Loan End	Gross Amt Awarded	Bank Fee	Net Amt Awarded	Net Amt Packaged
Non-Need-Based Loan		Estimated	4/12/2009	4/10/2010	$10,345.00	$517.25	9,827.75	$9,827.75

Thomson, Scott 0908TH0589

2009-10	1	8/1/2009	2/27/2010	Future Start	Not Packaged			$13,100.00	$13,100.00	
Culinary Arts				0	8/18/2009	NC				

Fund Source	CL App Status	Aid Status	Loan Start	Loan End	Gross Amt Awarded	Bank Fee	Net Amt Awarded	Net Amt Packaged
Federal Supplemental Educ. Opp. Grant		Estimated			$1,200.00	$0.00	1,200.00	$1,200.00
Student Payments		Approved			$2,250.00	$0.00	2,250.00	$2,250.00

2009-10	2	2/28/2010	9/26/2010	Future Start	Not Packaged					
Culinary Arts				0	8/18/2009	NC				

Fund Source	CL App Status	Aid Status	Loan Start	Loan End	Gross Amt Awarded	Bank Fee	Net Amt Awarded	Net Amt Packaged
Student Payments		Approved			$750.00	$0.00	750.00	$750.00

Winter, Art 0901WI0566

2008-09	1	1/19/2009	8/17/2009	Future Start	Not Packaged			$13,335.00	$13,335.00	
Culinary Arts				0	1/15/2009	NC				

Fund Source	CL App Status	Aid Status	Loan Start	Loan End	Gross Amt Awarded	Bank Fee	Net Amt Awarded	Net Amt Packaged
Federal Perkins Loan		Pending	1/19/2009	8/17/2009	$1,200.00	$60.00	1,140.00	$1,140.00
Federal Stafford Unsub Loan		Pending	1/19/2009	8/17/2009	$3,500.00	$175.00	3,325.00	$3,325.00

11 Enrollment(s) selected

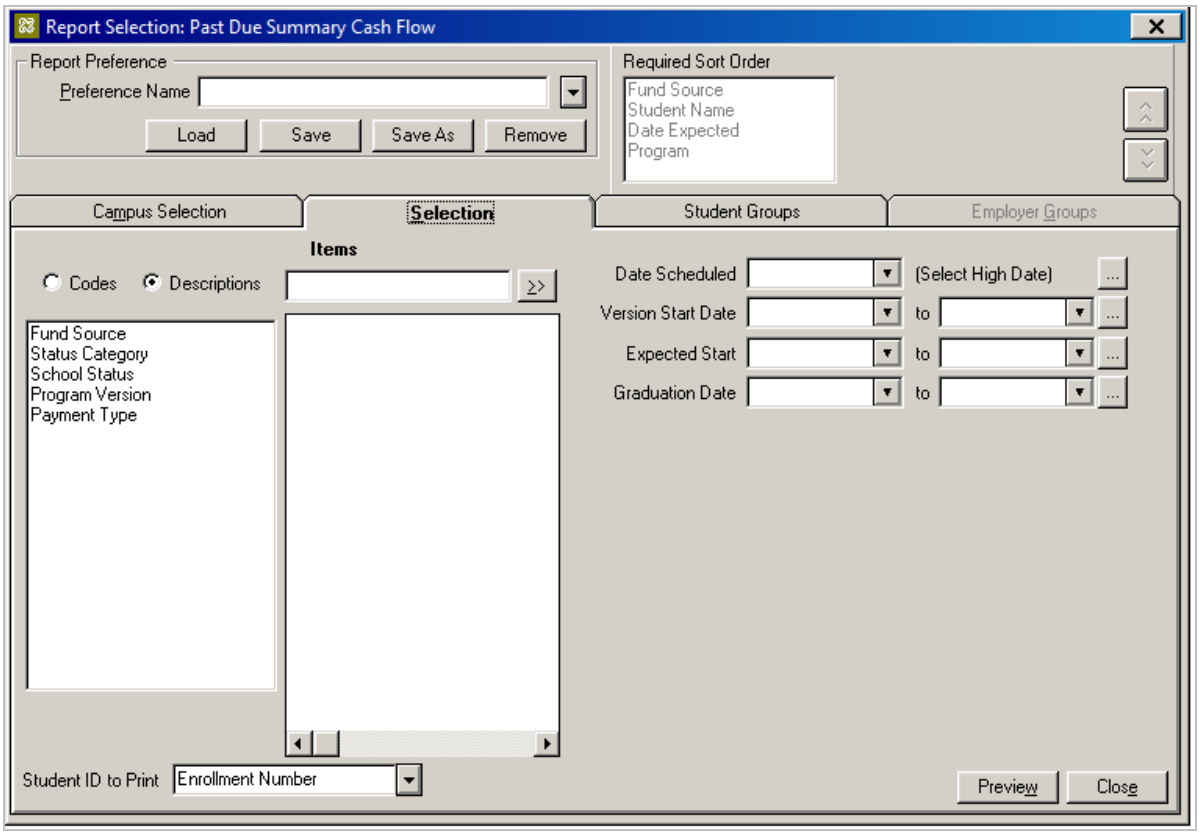
Campus Management Page 3 of 3

Past Due Summary Cash Flow

This report tracks financial aid that is past due. The report is sorted by Fund Source, Student Name, Date Expected, and Program.

To run the report:

1. Navigate to **Reports > Financial Aid > Past Due Summary Cash Flow**. The Report Selection: Past Due Summary Cash Flow form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report is summarized by fund source. It uses the aged receivables format of 0 - 30, 31 - 60, 61 - 90, 91 - 120, and 121+ days past due.

   A summary page is shown first with drill down to details by fund source. Double-click a fund source line on the summary page to see a list of students that make up the summary line.

   The following is an example of a summary page followed by details for a fund source.

Past Due Summary Cash Flow

rpt_faPstDuCshFlw.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- School Status (all)

Sorted by: Fund Source, Student Name, Date Expected, Program

12/25/2012
7:05:44PM

Past Due Totals By Fund Source

	0 - 30	31 - 60 Day	61 - 90	91 - 120	121 +	Total
Federal Dir Parent Loan Undergr Students	2,438.00	0.00	0.00	0.00	67,371.00	69,809.00
Federal Direct Subsidized Loan	0.00	0.00	0.00	0.00	68,232.00	68,232.00
Federal Direct Unsubsidized Loan	1,742.00	0.00	0.00	0.00	34,389.00	36,131.00
Federal Pell Grant	0.00	0.00	0.00	0.00	35,150.00	35,150.00
Federal Perkins Loan	0.00	0.00	0.00	0.00	60,555.50	60,555.50
Federal Stafford PLUS Loan	0.00	0.00	0.00	0.00	95.00	95.00
Federal Stafford Sub Loan	0.00	0.00	0.00	0.00	53,059.90	53,059.90
Federal Stafford Unsub Loan	0.00	0.00	0.00	0.00	31,569.00	31,569.00
Federal Supplemental Educ. Opp. Grant	0.00	0.00	0.00	0.00	17,800.00	17,800.00
Federal Work Study	0.00	0.00	0.00	0.00	800.00	800.00
Georgia Education Fund	0.00	0.00	0.00	0.00	5,000.00	5,000.00
Grant (Other than Pell)	0.00	0.00	0.00	0.00	2,100.00	2,100.00
Grant One	0.00	0.00	0.00	0.00	6,000.00	6,000.00
Non-Need-Based Loan	0.00	0.00	0.00	0.00	11,727.75	11,727.75
Other Resources	0.00	0.00	0.00	0.00	29,782.99	29,782.99

Past Due Summary Cash Flow

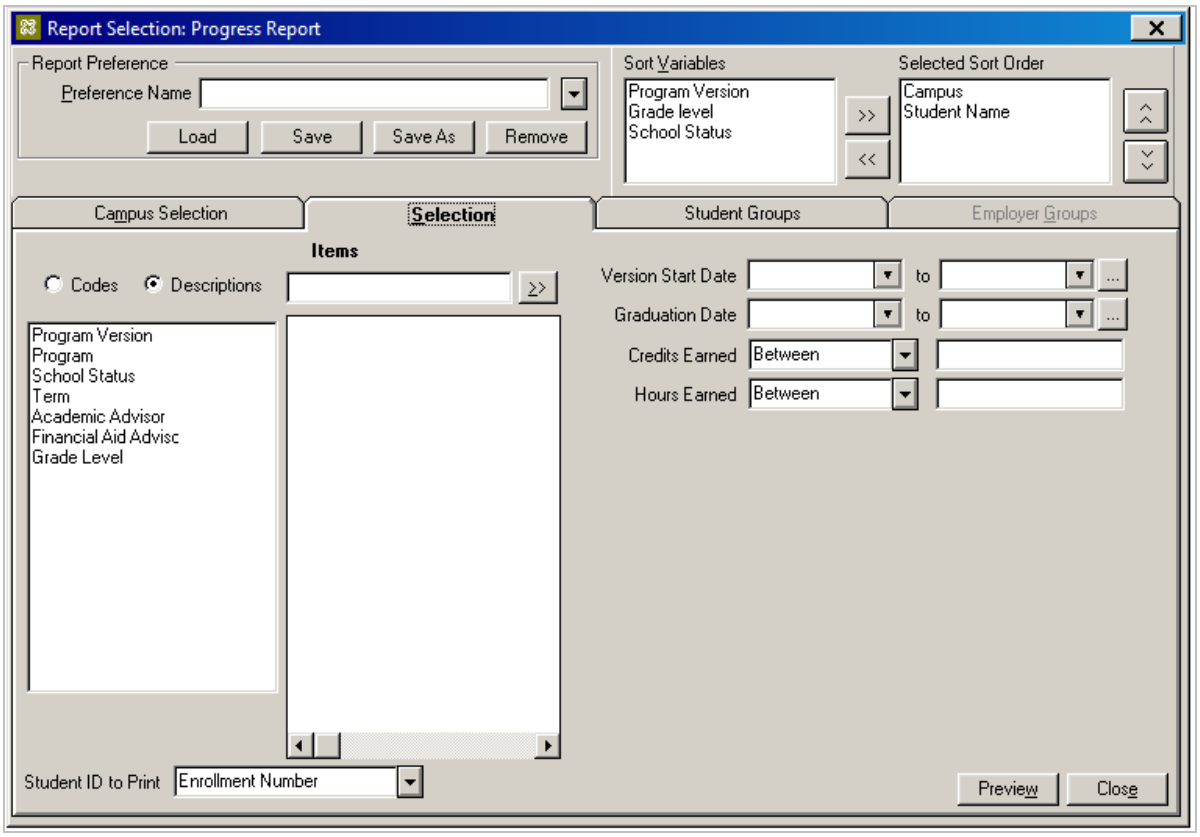
Student ID	Date Exp	Student Name	Student AR Balance	0 - 30	31 - 60	61 - 90	91 - 120	121 +	Total
0601AL0494	2/17/2006	Student, Viv	8,850.00	0.00	0.00	0.00	0.00	5,000.00	5,000.00
Student ID	**Date Exp**	**Student Name**	**Student AR Balance**	**0 - 30**	**31 - 60**	**61 - 90**	**91 - 120**	**121 +**	**Total**
0609UT0526	12/24/2008	Uthe, Deb	7,205.00	0.00	0.00	0.00	0.00	1,000.00	1,000.00
Grant One				0.00	0.00	0.00	0.00	6,000.00	6,000.00

Progress Report

This report allows you to view the progress of more than one student at a time. Financial Aid eligibility and Academic Record information for multiple students are displayed on this report.

To run the report:

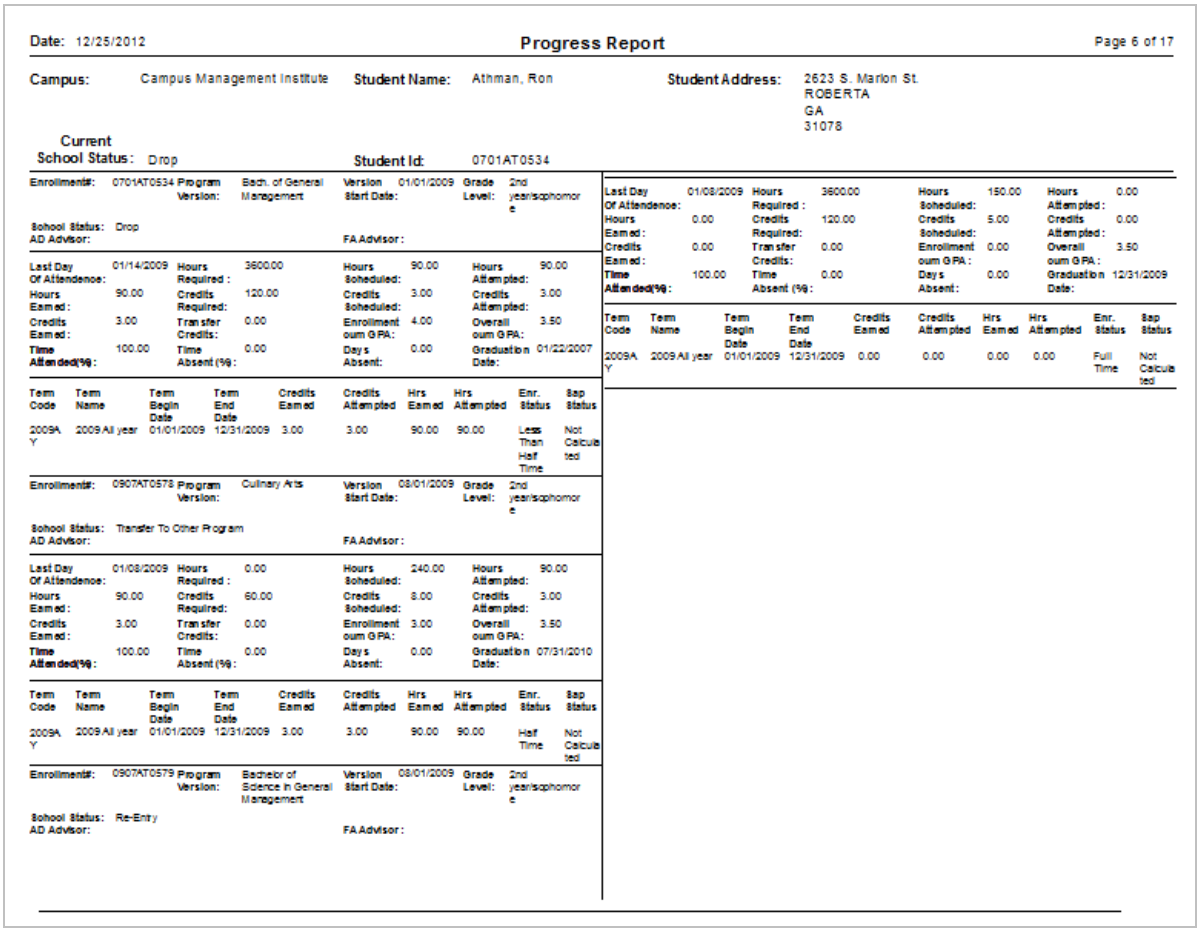
1. Navigate to **Reports > Financial Aid > Progress Report**. The Report Selection: Progress Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.



Date: 12/25/2012 — Progress Report — Page 6 of 17

Campus: Campus Management Institute Student Name: Athman, Ron Student Address: 2623 S. Marion St. ROBERTA GA 31078

Current School Status: Drop Student Id: 0701AT0534

Enrollment#: 0701AT0534 Program Version: Bach. of General Management Version Start Date: 01/01/2009 Grade Level: 2nd year/sophomore

School Status: Drop
AD Advisor: FA Advisor:

Last Day Of Attendence:	01/14/2009	Hours Required :	3600.00	Hours Scheduled:	90.00	Hours Attempted:	90.00
Hours Earned:	90.00	Credits Required:	120.00	Credits Scheduled:	3.00	Credits Attempted:	3.00
Credits Earned:	3.00	Transfer Credits:	0.00	Enrollment oum GPA:	4.00	Overall oum GPA:	3.50
Time Attended(%):	100.00	Time Absent (%):	0.00	Days Absent:	0.00	Graduation Date:	01/22/2007

Term Code	Term Name	Term Begin Date	Term End Date	Credits Earned	Credits Attempted	Hrs Earned	Hrs Attempted	Enr. Status	Sap Status
2009AY	2009 All year	01/01/2009	12/31/2009	3.00	3.00	90.00	90.00	Less Than Half Time	Not Calculated

Enrollment#: 0907AT0578 Program Version: Culinary Arts Version Start Date: 08/01/2009 Grade Level: 2nd year/sophomore

School Status: Transfer To Other Program
AD Advisor: FA Advisor:

Last Day Of Attendence:	01/08/2009	Hours Required :	0.00	Hours Scheduled:	240.00	Hours Attempted:	90.00
Hours Earned:	90.00	Credits Required:	60.00	Credits Scheduled:	8.00	Credits Attempted:	3.00
Credits Earned:	3.00	Transfer Credits:	0.00	Enrollment oum GPA:	3.00	Overall oum GPA:	3.50
Time Attended(%):	100.00	Time Absent (%):	0.00	Days Absent:	0.00	Graduation Date:	07/31/2010

Term Code	Term Name	Term Begin Date	Term End Date	Credits Earned	Credits Attempted	Hrs Earned	Hrs Attempted	Enr. Status	Sap Status
2009AY	2009 All year	01/01/2009	12/31/2009	3.00	3.00	90.00	90.00	Half Time	Not Calculated

Enrollment#: 0907AT0579 Program Version: Bachelor of Science in General Management Version Start Date: 08/01/2009 Grade Level: 2nd year/sophomore

School Status: Re-Entry
AD Advisor: FA Advisor:

Last Day Of Attendence:	01/08/2009	Hours Required :	3600.00	Hours Scheduled:	150.00	Hours Attempted:	0.00
Hours Earned:	0.00	Credits Required:	120.00	Credits Scheduled:	5.00	Credits Attempted:	0.00
Credits Earned:	0.00	Transfer Credits:	0.00	Enrollment oum GPA:	0.00	Overall oum GPA:	3.50
Time Attended(%):	100.00	Time Absent (%):	0.00	Days Absent:	0.00	Graduation Date:	12/31/2009

Term Code	Term Name	Term Begin Date	Term End Date	Credits Earned	Credits Attempted	Hrs Earned	Hrs Attempted	Enr. Status	Sap Status
2009AY	2009 All year	01/01/2009	12/31/2009	0.00	0.00	0.00	0.00	Full Time	Not Calculated

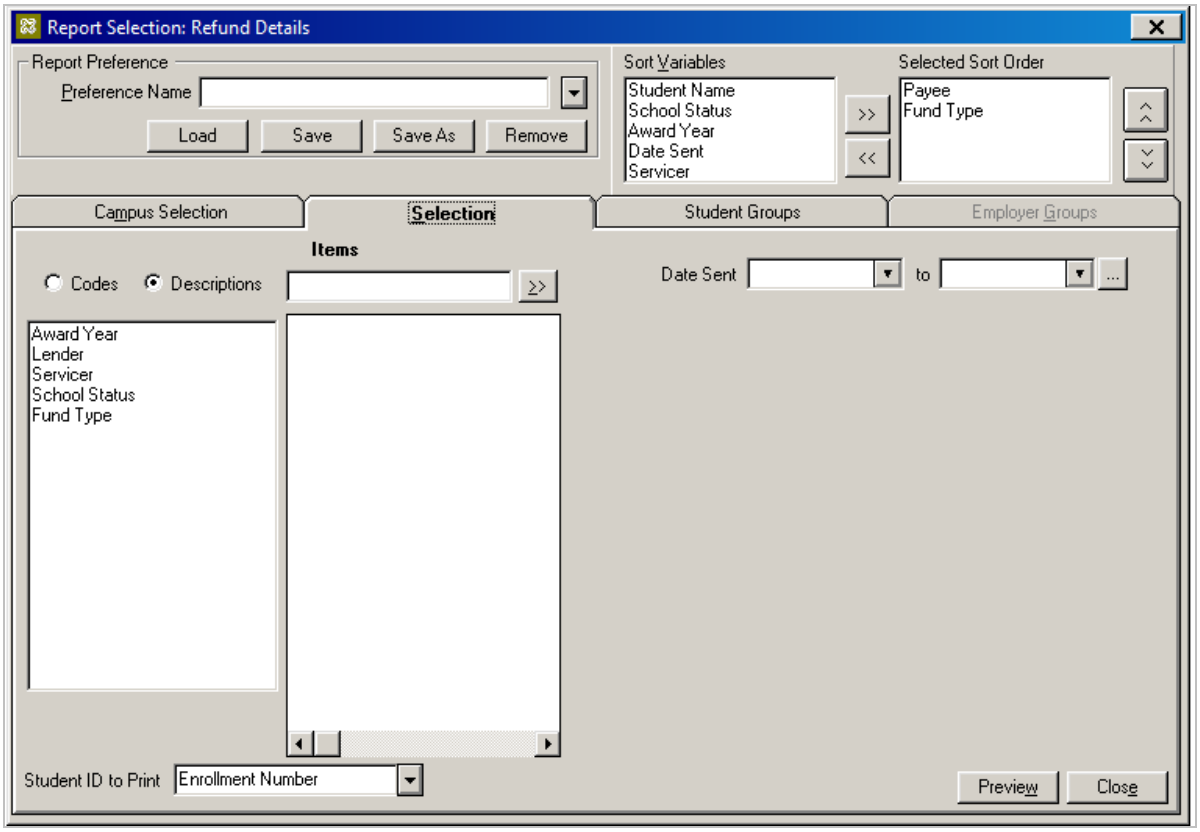
Refund Details

This report provides a detail report of all processed refunds by Lender, Student, and Fund Source Type. It also contains a summary total amount for the total refunds included in the report.

The report may be configured to report on one, some, or all campuses, and it may also be configured to report on individual Student Groups.

To run the report:

1. Navigate to **Reports > Financial Aid > Refund Details**. The Report Selection: Refund Details form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

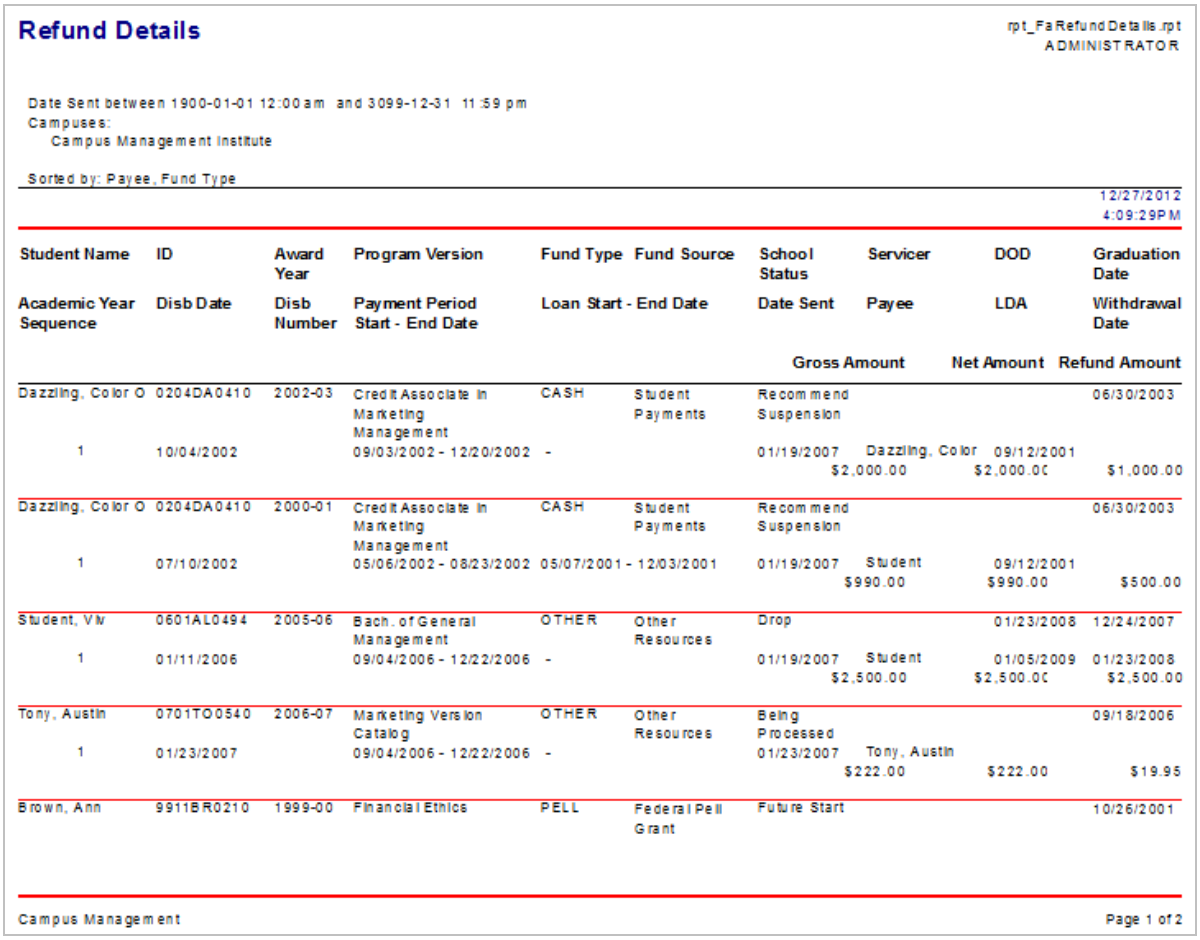
   The report displays the following details:

   - Student ID (SSN, Student ID, or Enrollment ID, depending on configuration)
   - Student Name
   - Award Year
   - Payee (Institution, Bank, or Person receiving the refund)

- Program Version
- Fund Source Type
- Fund Source
- Disbursement Number

Note: Whereas a refund is not directly associated with a disbursement, it is related to aid; based on the aid, the system identifies the disbursement to which the refund is related.

- Gross Amount
- Net Amount
- Refund Amount
- School Status
- Last Day of Attendance (LDA)
- Withdrawal Date
- Date Sent
- Servicer
- Date of Determination (DOD)
- Graduation Date
- Academic Year Sequence
- Payment Period Start Date
- Payment Period End Date
- Disbursement Date
- Loan Start Date
- Loan End Date



Refund Details

rpt_FaRefundDetails.rpt
ADMINISTRATOR

Date Sent between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Campuses:
Campus Management Institute

Sorted by: Payee, Fund Type

12/27/2012
4:09:29PM

Student Name	ID	Award Year	Program Version	Fund Type	Fund Source	School Status	Servicer	DOD	Graduation Date
Academic Year Sequence	Disb Date	Disb Number	Payment Period Start - End Date	Loan Start - End Date		Date Sent	Payee	LDA	Withdrawal Date
						Gross Amount		Net Amount	Refund Amount
Dazzling, Color O	0204DA0410	2002-03	Credit Associate in Marketing Management	CASH	Student Payments	Recommend Suspension			06/30/2003
1	10/04/2002		09/03/2002 - 12/20/2002	-		01/19/2007	Dazzling, Color	09/12/2001	
						$2,000.00		$2,000.00	$1,000.00
Dazzling, Color O	0204DA0410	2000-01	Credit Associate in Marketing Management	CASH	Student Payments	Recommend Suspension			06/30/2003
1	07/10/2002		05/06/2002 - 08/23/2002	05/07/2001 - 12/03/2001		01/19/2007	Student	09/12/2001	
						$990.00		$990.00	$500.00
Student, Vic	0601AL0494	2005-06	Bach. of General Management	OTHER	Other Resources	Drop		01/23/2008	12/24/2007
1	01/11/2006		09/04/2006 - 12/22/2006	-		01/19/2007	Student	01/05/2009	01/23/2008
						$2,500.00		$2,500.00	$2,500.00
Tony, Austin	0701TO0540	2006-07	Marketing Version Catalog	OTHER	Other Resources	Being Processed			09/18/2006
1	01/23/2007		09/04/2006 - 12/22/2006	-		01/23/2007	Tony, Austin		
						$222.00		$222.00	$19.95
Brown, Ann	9911BR0210	1999-00	Financial Ethics	PELL	Federal Pell Grant	Future Start			10/26/2001

Campus Management

Page 1 of 2

Remaining Balance To Schedule (Acad. Year)

This report displays the funding requirements for an Academic Year. The Remaining Balance To Schedule (Acad. Year) report displays funding information based on school status (current status of student) to prevent duplicate counts for students with both Drop and Active enrollments or students with both Program Transfer and Graduate enrollments on the Remaining Balance to Schedule (Full Program) report.

The remaining balance to schedule is a number computed by comparing the total charges for a specified block of time to all monies scheduled to be received for that same block of time. This information enables the school to quickly identify any students where the proper amount of funding has not been scheduled to cover the cost for any specific enrollment period.

The remaining balance to schedule for a student is computed based on 1 of 2 possible blocks of time. The block of time used for a student depends on which report is used.

- Remaining Balance to Schedule for Term: If the frequency for the billing method is T, then the Term/Semester block of time will be used. See Remaining Balance to Schedule (Term) report.
- Remaining Balance to Schedule for Academic Year: If the frequency for the billing method is A, then the Academic Year will be used.

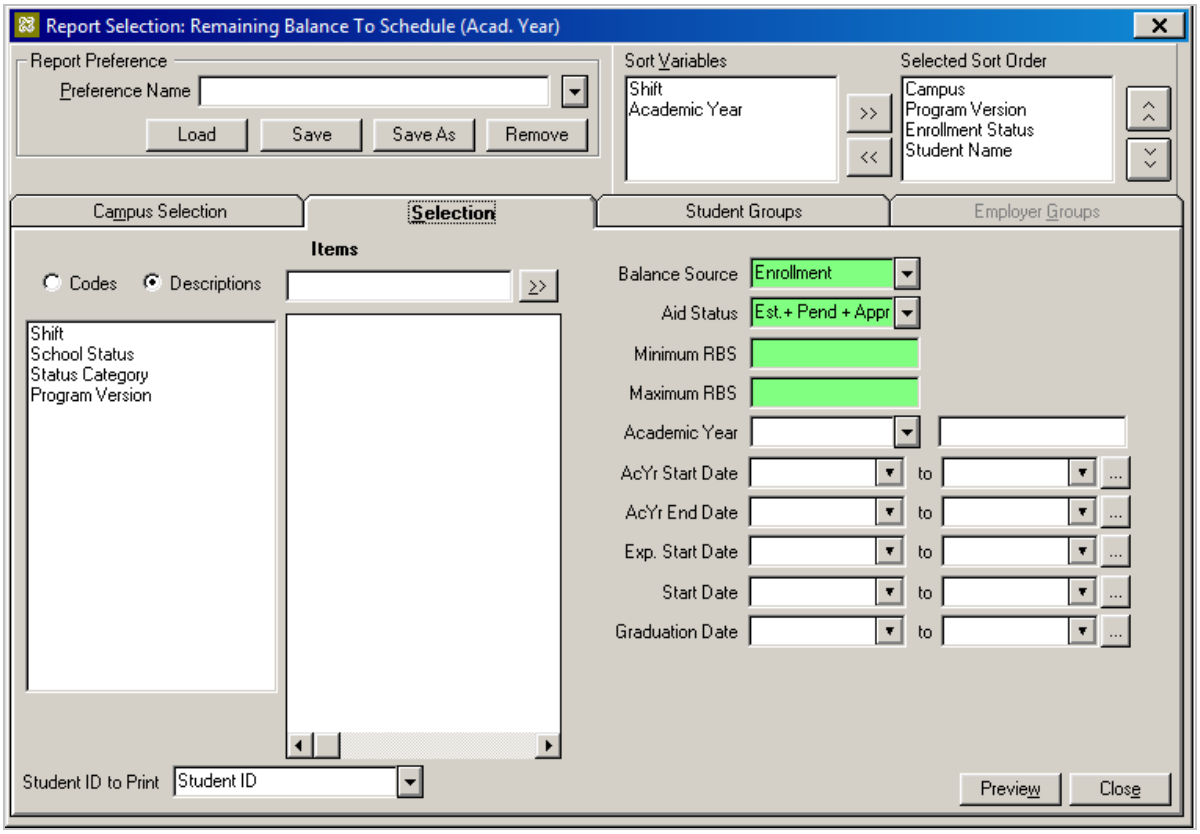
The Remaining Balance To Schedule (Acad. Year) report uses the institutional charges for an Academic Year. However, the report requires the billing frequency to be A. Since the report uses institutional charges, it theoretically works regardless of the billing method.

To run the report:

1. Navigate to **Reports > Financial Aid > Remaining Balance To Schedule (Acad. Year)**. The Report Selection: Remaining Balance To Schedule (Acad. Year) form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Notes:

   - When you select the Permanent Out status category, if a student has multiple enrollments in a Permanent Out status, then the information is not duplicated on the report and the AR Balance on the report is the enrollment account balance, not the student account balance.
   - When you select all Academic Years that meet as of a specific date, all records that match the additional selection criteria (status, program version, etc.) are included in the report.
   - If a student has two Academic Years (in different enrollments) that meet on this date, and both enrollments match the other selection criteria, the student is listed twice. The balance is also displayed twice on the report for this student.
   - Students are only eliminated from the report if you specify an institutional cost variance and the student does not meet this condition.
   - You must select an Academic Year as-of-date.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

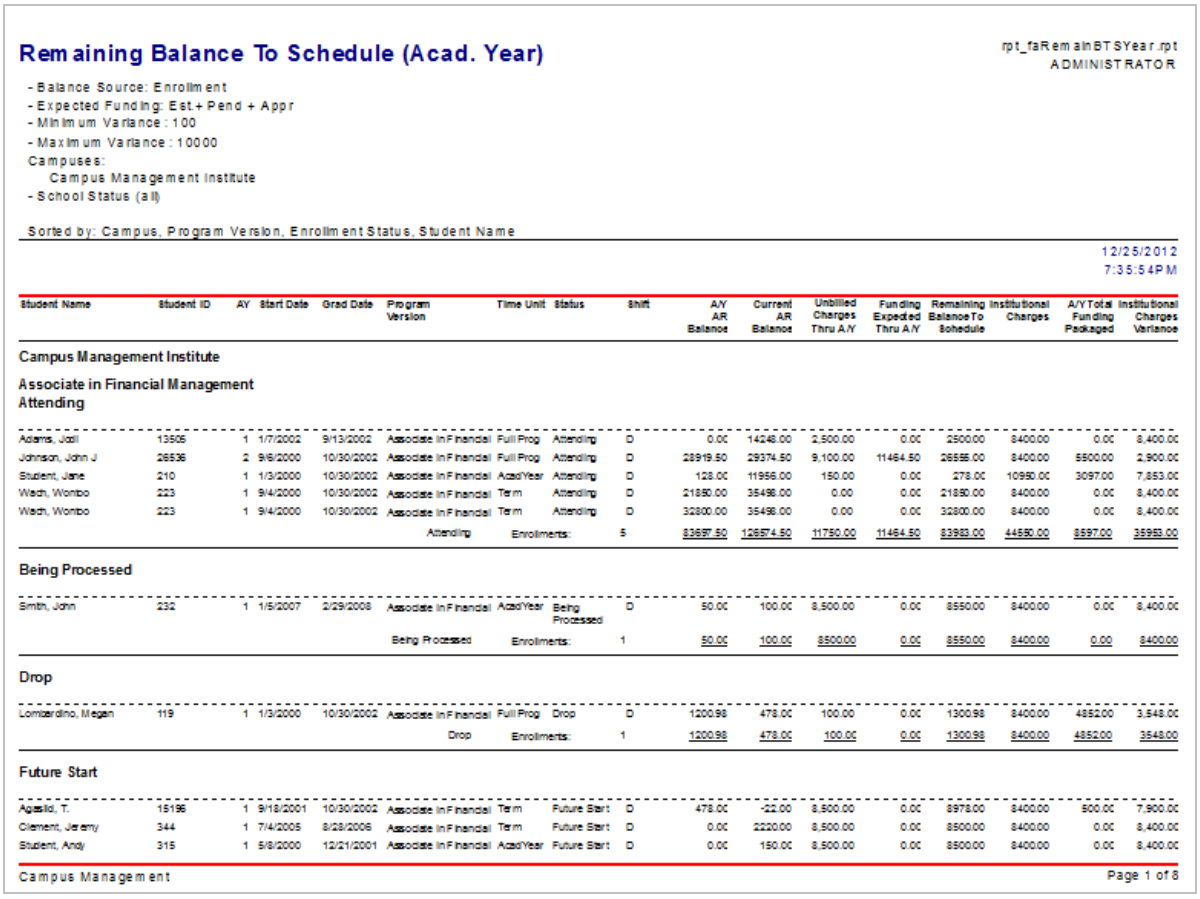
   - Student Name
   - Student ID
   - Academic Year
   - Start Date
   - Graduation Date
   - Program Version
   - Time Unit
   - Status
   - Shift
   - Academic Year AR Balance
   - Current AR Balance
   - Unbilled Charges Thru Academic Year
   - Funding Expected Thru Academic Year
   - Remaining Balance to Schedule
   - Institutional Charges
   - Academic Year Total Funding Packaged
   - Institutional Charges Variance

   All amount columns are subtotaled at the group levels and grand totaled.

Notes:

The 'Funding Expected Thru AY' column accommodates aid still expected from a prior Academic Year. This columns shows all records for the enrollment where the Date Scheduled is equal to or less than the end date of the student's Academic Year. Expected Funding displays ALL records with funds anticipated through the end date of the Academic Year selected.

If a student is selected to appear on the report based on selection criteria, but an Academic Year is not found that meets on the date requested by the user, the report lists the student name and the remark "No Academic Year on File for Student."



Remaining Balance To Schedule (Acad. Year)

rpt_faRemainBTSYear.rpt
ADMINISTRATOR

- Balance Source: Enrollment
- Expected Funding: Est + Pend + Appr
- Minimum Variance : 100
- Maximum Variance : 10000

Campuses:
Campus Management Institute
- School Status (all)

Sorted by: Campus, Program Version, Enrollment Status, Student Name

12/25/2012
7:35:54PM

Student Name	Student ID	AY	Start Date	Grad Date	Program Version	Time Unit	Status	Shift	A/Y AR Balance	Current AR Balance	Unbilled Charges Thru A/Y	Funding Expected Thru A/Y	Remaining Balance To Schedule	Institutional Charges	A/Y Total Funding Packaged	Institutional Charges Variance
Campus Management Institute																
Associate in Financial Management																
Attending																
Adams, Jodi	13505	1	1/7/2002	9/13/2002	Associate in Financial	Full Prog	Attending	D	0.00	14248.00	2,500.00	0.00	2500.00	8400.00	0.00	8,400.00
Johnson, John J	26536	2	9/6/2000	10/30/2002	Associate in Financial	Full Prog	Attending	D	28919.50	29374.50	9,100.00	11464.50	26555.00	8400.00	5500.00	2,900.00
Student, Jane	210	1	1/3/2000	10/30/2002	Associate in Financial	Acad/Year	Attending	D	128.00	11956.00	150.00	0.00	278.00	10950.00	3097.00	7,853.00
Wach, Wombo	223	1	9/4/2000	10/30/2002	Associate in Financial	Term	Attending	D	21850.00	35496.00	0.00	0.00	21850.00	8400.00	0.00	8,400.00
Wach, Wombo	223	1	9/4/2000	10/30/2002	Associate in Financial	Term	Attending	D	32800.00	35496.00	0.00	0.00	32800.00	8400.00	0.00	8,400.00
						Attending	Enrollments:	5	83697.50	126574.50	11750.00	11464.50	83983.00	44550.00	8597.00	35953.00
Being Processed																
Smith, John	232	1	1/5/2007	2/29/2008	Associate in Financial	Acad/Year	Being Processed	D	50.00	100.00	8,500.00	0.00	8550.00	8400.00	0.00	8,400.00
						Being Processed	Enrollments:	1	50.00	100.00	8500.00	0.00	8550.00	8400.00	0.00	8400.00
Drop																
Lombardino, Megan	119	1	1/3/2000	10/30/2002	Associate in Financial	Full Prog	Drop	D	1200.98	478.00	100.00	0.00	1300.98	8400.00	4852.00	3,548.00
						Drop	Enrollments:	1	1200.98	478.00	100.00	0.00	1300.98	8400.00	4852.00	3548.00
Future Start																
Agasild, T.	15196	1	9/18/2001	10/30/2002	Associate in Financial	Term	Future Start	D	478.00	-22.00	8,500.00	0.00	8978.00	8400.00	500.00	7,900.00
Clement, Jeremy	344	1	7/4/2005	8/28/2006	Associate in Financial	Term	Future Start	D	0.00	2220.00	8,500.00	0.00	8500.00	8400.00	0.00	8,400.00
Student, Andy	315	1	5/8/2000	12/21/2001	Associate in Financial	Acad/Year	Future Start	D	0.00	150.00	8,500.00	0.00	8500.00	8400.00	0.00	8,400.00

Campus Management

Page 1 of 8

Remaining Balance To Schedule (Full Program)

This report displays the funding requirements for a full program.

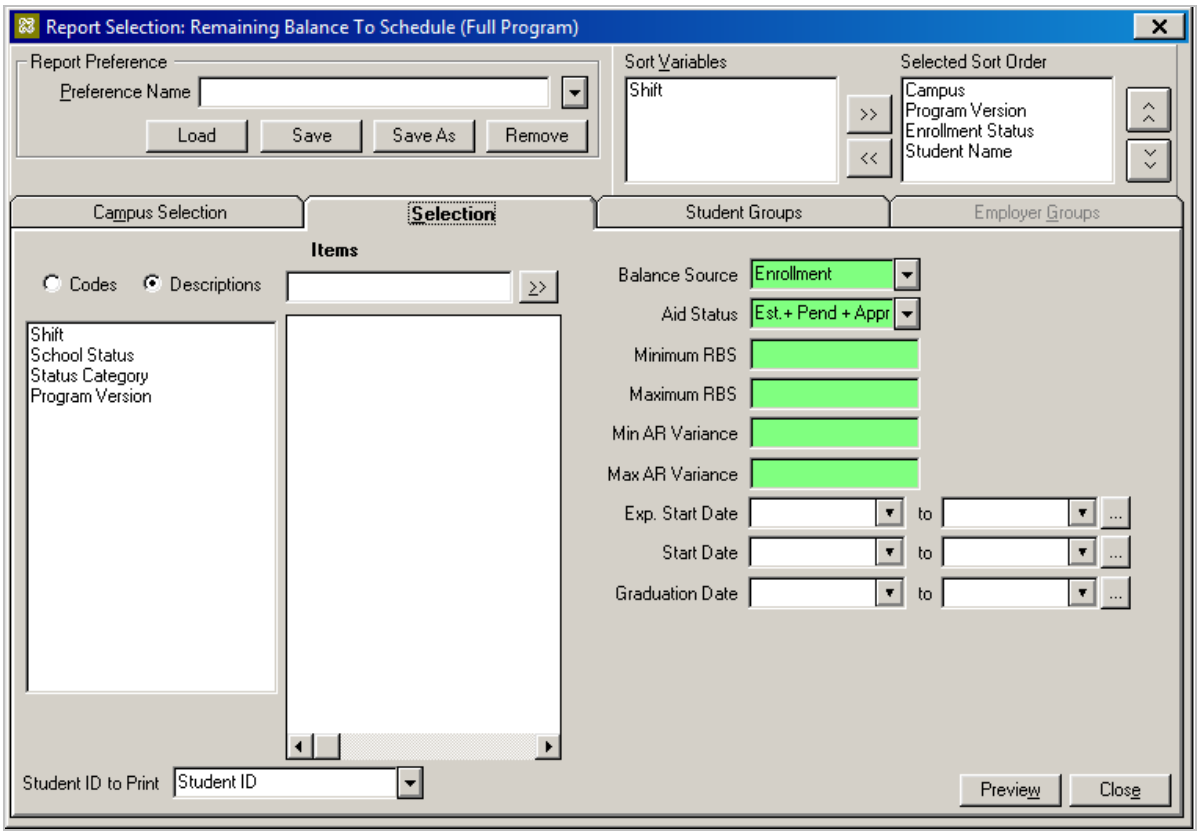
The remaining balance to schedule is a number computed by comparing the total charges for a specified block of time to all monies scheduled to be received for that same block of time. This information enables the school to quickly identify any students where the proper amount of funding has not been scheduled to cover the cost for any specific enrollment period.

The remaining balance to schedule for a student is computed based on 1 of 2 possible blocks of time. The block of time used for a student depends on which report is used.

- Remaining Balance to Schedule for Term: If the frequency for the billing method is T, then the Term/Semester block of time will be used. See Remaining Balance to Schedule (Term) report.
- Remaining Balance to Schedule for Academic Year: If the frequency for the billing method is A, then the Academic Year will be used. See Remaining Balance to Schedule (Acad. Year) report.

To run the report:

1. Navigate to **Reports > Financial Aid > Remaining Balance To Schedule (Full Program)**. The Report Selection: Remaining Balance To Schedule (Full Program) form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

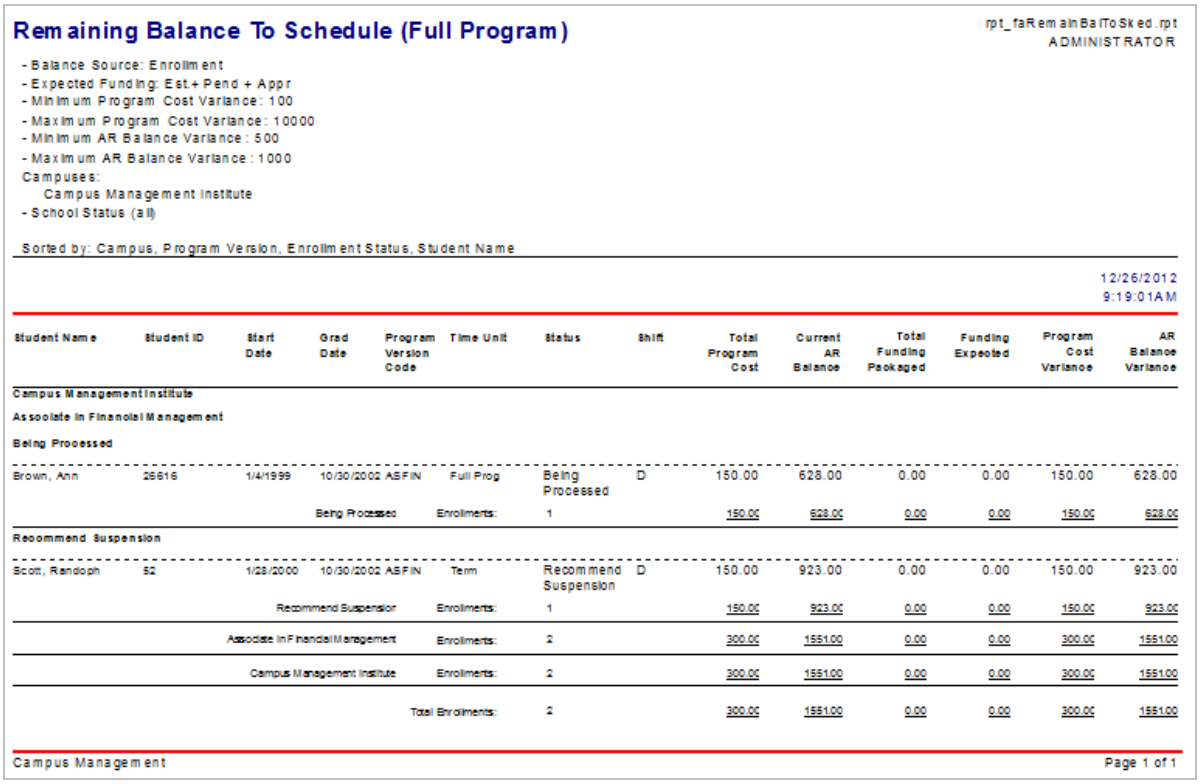
Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Student ID
   - Start Date
   - Graduation Date
   - Program Version Code
   - Time Unit
   - Status
   - Shift
   - Total Program Cost
   - Current AR Balance
   - Total Funding Packaged
   - Funding Expected
   - Program Cost Variance (total program cost minus total funding packaged)
   - AR Balance Variance (current AR balance minus funding expected)

   All amount columns are subtotaled at the group levels and grand totaled.



Remaining Balance To Schedule (Full Program)

rpt_faRemainBalToSked.rpt
ADMINISTRATOR

- Balance Source: Enrollment
- Expected Funding: Est + Pend + Appr
- Minimum Program Cost Variance: 100
- Maximum Program Cost Variance: 10000
- Minimum AR Balance Variance: 500
- Maximum AR Balance Variance: 1000

Campuses:
Campus Management Institute
- School Status (all)

Sorted by: Campus, Program Version, Enrollment Status, Student Name

12/26/2012
9:19:01AM

Student Name	Student ID	Start Date	Grad Date	Program Version Code	Time Unit	Status	Shift	Total Program Cost	Current AR Balance	Total Funding Packaged	Funding Expected	Program Cost Variance	AR Balance Variance
Campus Management Institute													
Associate in Financial Management													
Being Processed													
Brown, Ann	29616	1/4/1999	10/30/2002	ASFIN	Full Prog	Being Processed	D	150.00	628.00	0.00	0.00	150.00	628.00
			Being Processed		Enrollments:	1		150.00	628.00	0.00	0.00	150.00	628.00
Recommend Suspension													
Scott, Randoph	52	1/28/2000	10/30/2002	ASFIN	Term	Recommend Suspension	D	150.00	923.00	0.00	0.00	150.00	923.00
			Recommend Suspension		Enrollments:	1		150.00	923.00	0.00	0.00	150.00	923.00
			Associate in Financial Management		Enrollments:	2		300.00	1551.00	0.00	0.00	300.00	1551.00
			Campus Management Institute		Enrollments:	2		300.00	1551.00	0.00	0.00	300.00	1551.00
					Total Enrollments:	2		300.00	1551.00	0.00	0.00	300.00	1551.00

Campus Management
Page 1 of 1

Remaining Balance To Schedule (Term)

This report displays funding information based on term costs.

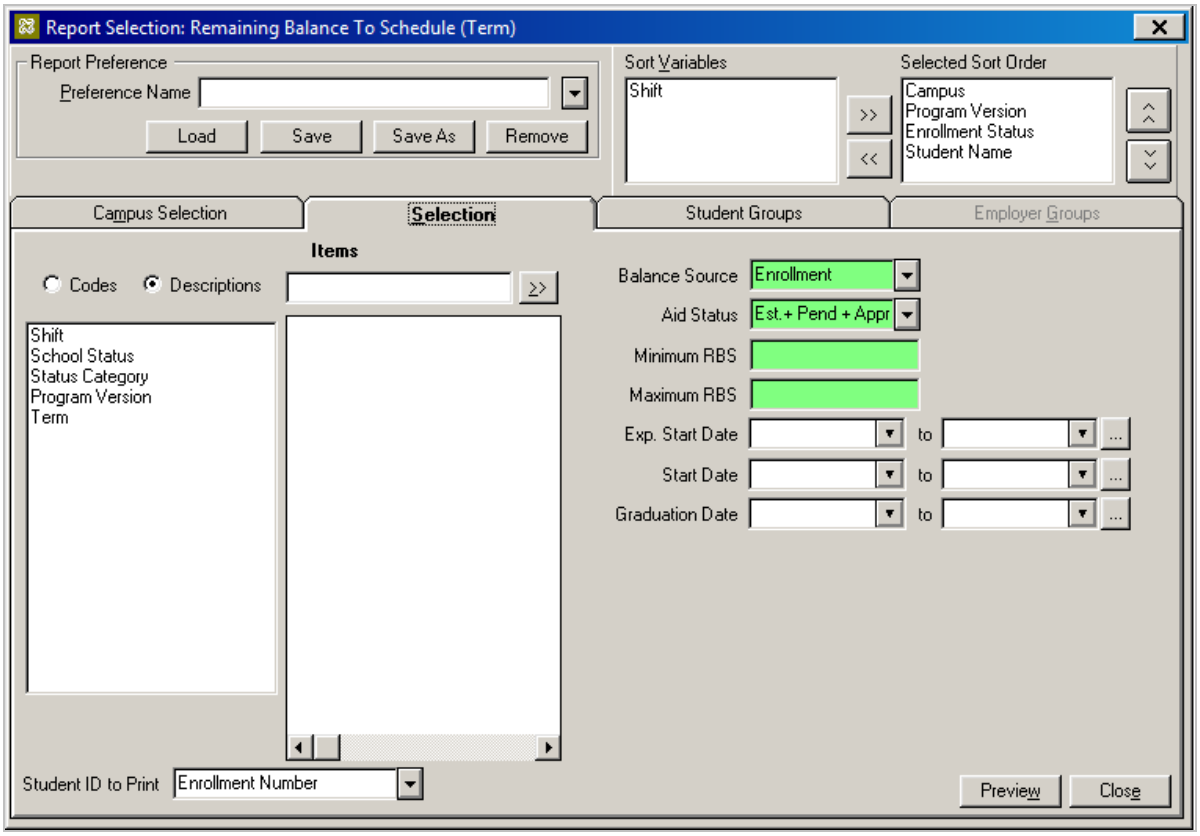
The remaining balance to schedule is a number computed by comparing the total charges for a specified block of time to all monies scheduled to be received for that same block of time. This information enables the school to quickly identify any students where the proper amount of funding has not been scheduled to cover the cost for any specific enrollment period.

The remaining balance to schedule for a student is computed based on 1 of 2 possible blocks of time. The block of time used for a student depends on which report is used.

- Remaining Balance to Schedule for Academic Year: If the frequency for the billing method is A, then the Academic Year will be used. See Remaining Balance to Schedule (Acad. Year) report.
- Remaining Balance to Schedule for Term: If the frequency for the billing method is T, then the Term/Semester block of time will be used.

To run the report:

1. Navigate to **Reports > Financial Aid > Remaining Balance To Schedule (Term)**. The Report Selection: Remaining Balance To Schedule (Term) form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

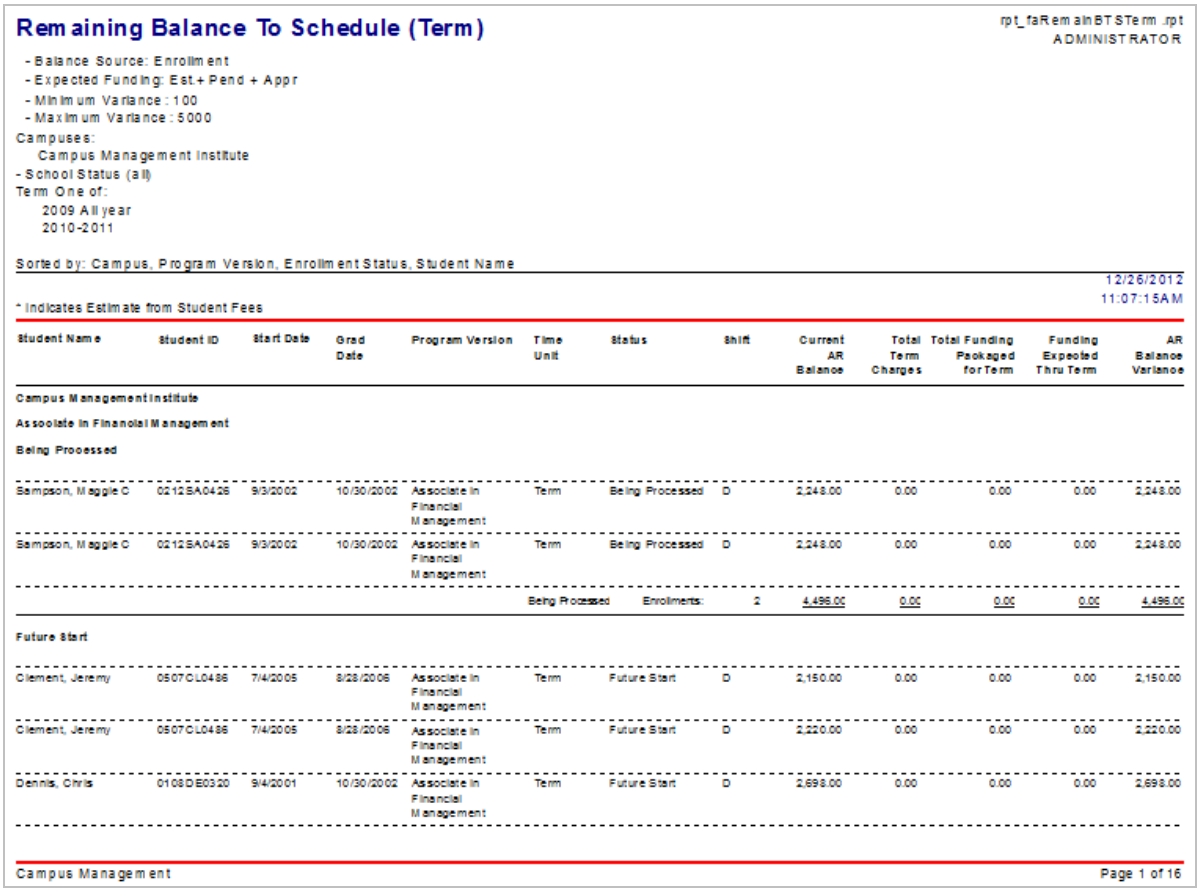
Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Student ID
   - Start Date
   - Graduation Date
   - Program Version
   - Time Unit
   - Status
   - Shift
   - Current AR Balance
   - Total Term Charges
   - Total Funding Packaged for Term
   - Funding Expected Thru Term
   - AR Balance Variance

   Subtotals and grand totals are provided on the amount fields.



Remaining Balance To Schedule (Term)

rpt_faRemainBTSTerm.rpt
ADMINISTRATOR

- Balance Source: Enrollment
- Expected Funding: Est.+ Pend + Appr
- Minimum Variance : 100
- Maximum Variance : 5000

Campuses:
Campus Management Institute
- School Status (all)
Term One of:
2009 All year
2010-2011

Sorted by: Campus, Program Version, Enrollment Status, Student Name

12/26/2012
11:07:15AM

* Indicates Estimate from Student Fees

Student Name	Student ID	Start Date	Grad Date	Program Version	Time Unit	Status	Shift	Current AR Balance	Total Term Charges	Total Funding Packaged for Term	Funding Expected Thru Term	AR Balance Variance
Campus Management Institute												
Associate in Financial Management												
Being Processed												
Sampson, Maggie C	0212SA0426	9/3/2002	10/30/2002	Associate in Financial Management	Term	Being Processed	D	2,248.00	0.00	0.00	0.00	2,248.00
Sampson, Maggie C	0212SA0426	9/3/2002	10/30/2002	Associate in Financial Management	Term	Being Processed	D	2,248.00	0.00	0.00	0.00	2,248.00
					Being Processed	Enrollments:	2	4,496.00	0.00	0.00	0.00	4,496.00
Future Start												
Clement, Jeremy	0507CL0486	7/4/2005	8/28/2006	Associate in Financial Management	Term	Future Start	D	2,150.00	0.00	0.00	0.00	2,150.00
Clement, Jeremy	0507CL0486	7/4/2005	8/28/2006	Associate in Financial Management	Term	Future Start	D	2,220.00	0.00	0.00	0.00	2,220.00
Dennis, Chris	0108DE0320	9/4/2001	10/30/2002	Associate in Financial Management	Term	Future Start	D	2,698.00	0.00	0.00	0.00	2,698.00

Campus Management
Page 1 of 16

Remaining Balance to Schedule by Course

The report displays the charges for the course as well as any payment plan disbursements associated with the course. The main purpose of this report is to display the difference in amounts charged versus any payment plans that have been setup to cover the charges for the course.

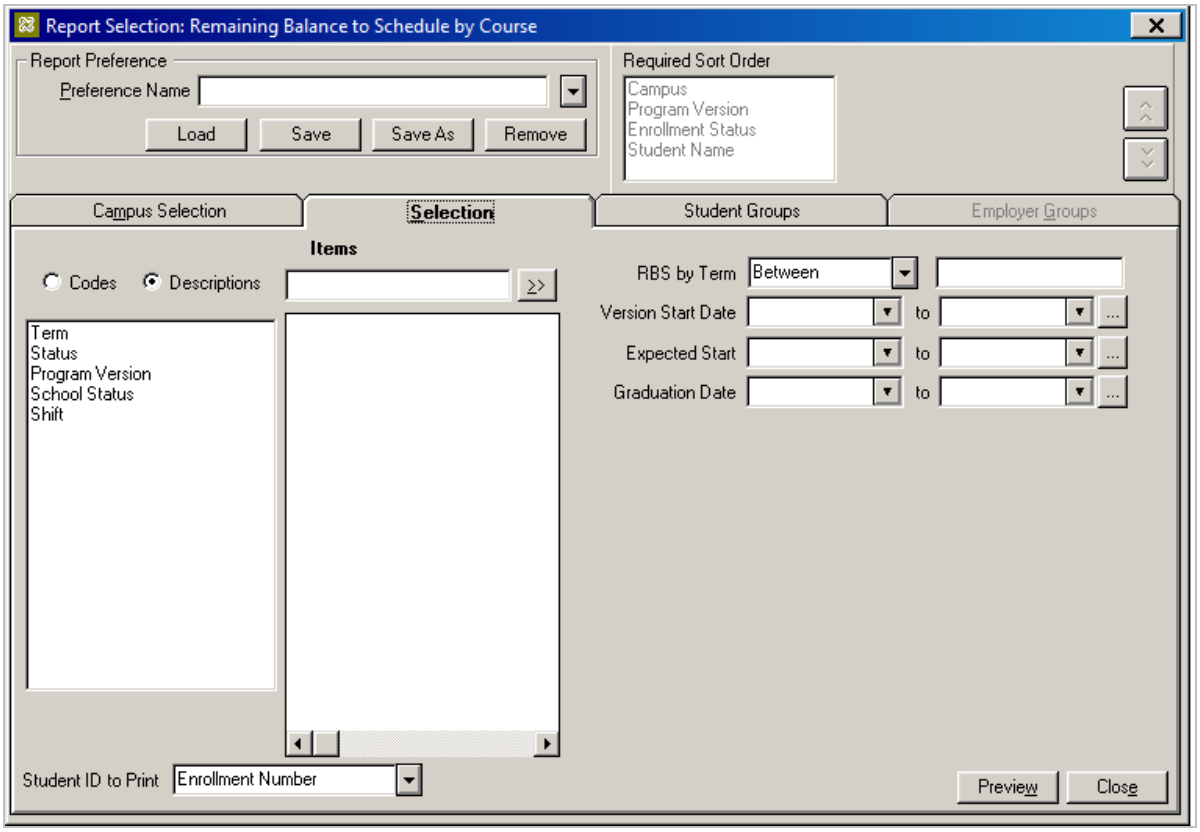
This report also identifies any 'Other Aid' that may be packaged and that could possibly cover the difference between the charges and any payment plans for the course. The 'Other Aid' consists of any scheduled aid with a disbursement date that falls within the term dates associated with the course, except for work study fund sources and those NOT marked for **Exclude from Estimated Financial Assistance** located under the **Fund Source Rules** section of the **Rules/Attributes tab**.

To run the report:

1. Navigate to **Reports > Financial Aid > Remaining Balance to Schedule by Course**. The Report Selection: Remaining Balance to Schedule by Course form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Notes:

   - You must select at least one Term other than ALL.
   - If you select a child term for the Student Accounts ledger entries, the associated parent term is used for the financial aid portion of the query.
   - You can select to filter the financial aid packaging for the appropriate courses based on the selection of aid Status: Estimated + Pending + Approved, Estimated Only, or Pending and Approved Only.
   - You can select to filter the report based on the Minimum and Maximum Remaining Balance to Schedule (RBS) amounts, where: RBS = Total Course Charges - Amount Packaged by Course
   - You can select to filter the report by an enrollment's expected start date, start date, and/or graduation date.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

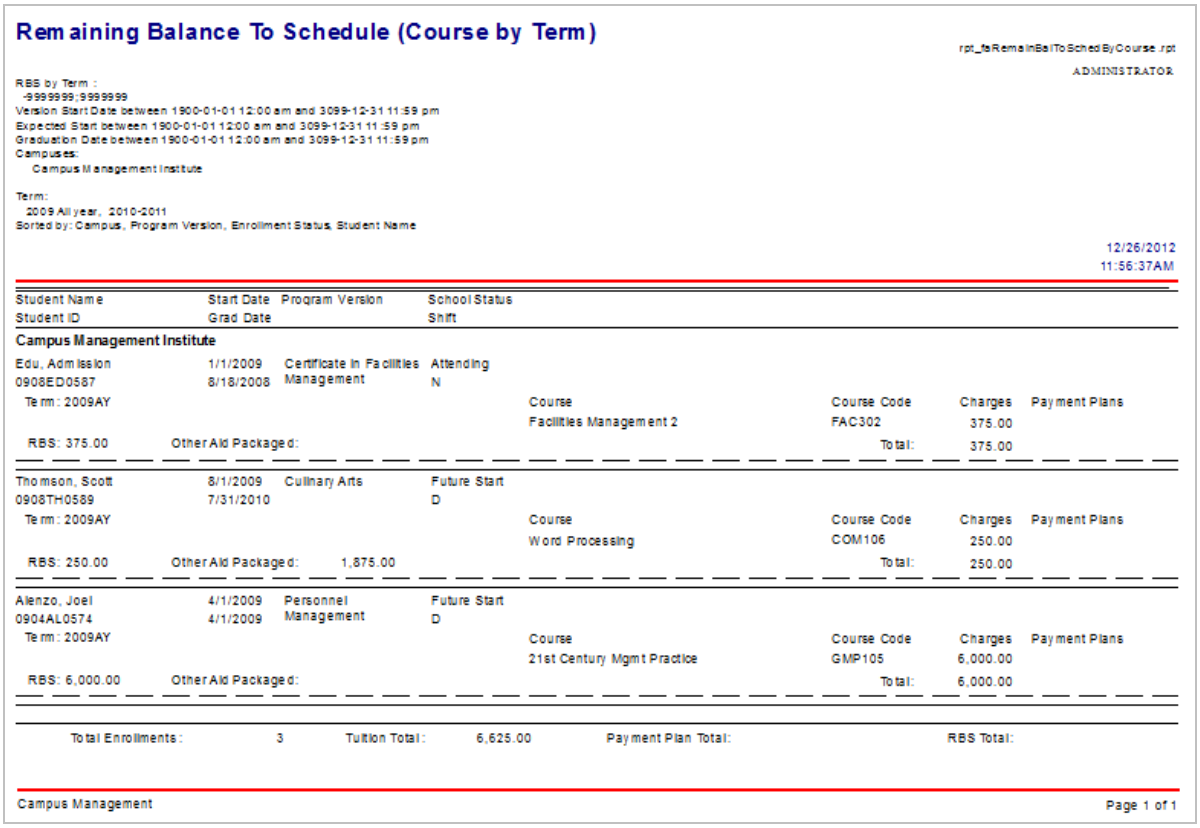
   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Student ID
   - Start Date
   - Graduation Date
   - Program Version
   - Status
   - Shift
   - Course
   - Course Code
   - Charges
   - Payment Plans

   Totals are provided on the amount fields.



Remaining Balance To Schedule (Course by Term)

rpt_faRemainBalToSchedByCourse.rpt

ADMINISTRATOR

RBS by Term :
-9999999;9999999
Version Start Date between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Expected Start between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Graduation Date between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Campuses:
Campus Management Institute

Term:
2009 All year, 2010-2011
Sorted by: Campus, Program Version, Enrollment Status, Student Name

12/26/2012
11:56:37AM

Student Name / Student ID	Start Date / Grad Date	Program Version	School Status / Shift	Course	Course Code	Charges	Payment Plans
Campus Management Institute							
Edu, Admission 0908ED0587	1/1/2009 8/18/2008	Certificate in Facilities Management	Attending N				
Term: 2009AY				Facilities Management 2	FAC302	375.00	
RBS: 375.00	Other Aid Packaged:				Total:	375.00	
Thomson, Scott 0908TH0589	8/1/2009 7/31/2010	Culinary Arts	Future Start D				
Term: 2009AY				Word Processing	COM106	250.00	
RBS: 250.00	Other Aid Packaged: 1,875.00				Total:	250.00	
Alenzo, Joel 0904AL0574	4/1/2009 4/1/2009	Personnel Management	Future Start D				
Term: 2009AY				21st Century Mgmt Practice	GMP105	6,000.00	
RBS: 6,000.00	Other Aid Packaged:				Total:	6,000.00	

Total Enrollments: 3 Tuition Total: 6,625.00 Payment Plan Total: RBS Total:

Campus Management

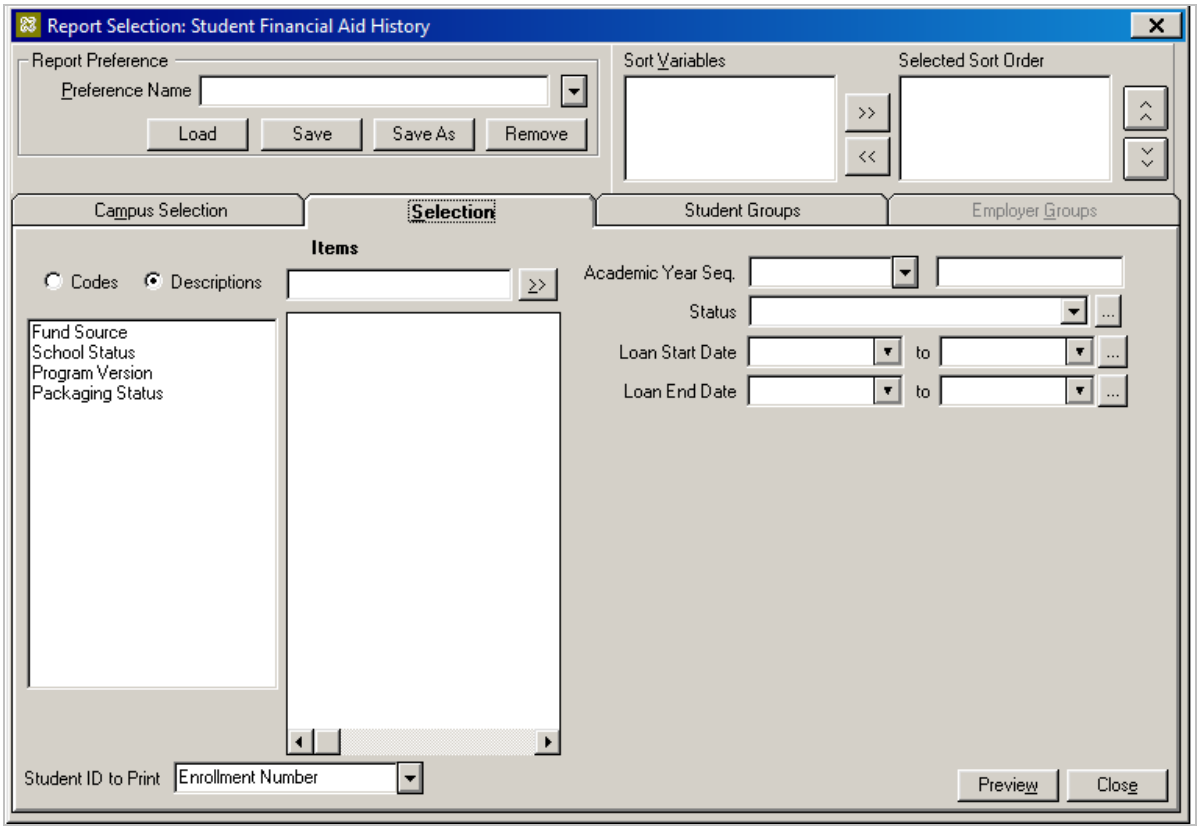
Page 1 of 1

Student Financial Aid History

This report provides details of the financial aid history for enrolled students.

To run the report:

1. Navigate to **Reports > Financial Aid > Student Financial Aid History**. The Report Selection: Student Financial Aid History form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   Details on this report include the following sections :

   - Student Name, ID, and Address
   - Academic Year
   - Funding Packaged

   The Academic Year section contains the following information:

- Award Year
- Academic Year
- Packaged Date and Status
- Cost of Attendance
- Packaged EFC
- Institutional Charges
- Gross Award Amount
- Net Funding Amount (does not include canceled disbursements, if any)

The Funding Packaged section contains the following information:

- Program Version
- School Status
- Award Year
- Fund Source
- Funding Status
- Loan Period
- Gross Award Amount
- Lender
- Servicer
- Guarantor
- Origination Status
- Bank Fee
- Net Award Amount
- Net Packaged Amount
- Amount Received
- Loan ID
- Promissory Note Status
- Disbursements section that lists the disbursement date, amount, status, term, and disbursement number for loans.

The Net Packaged calculation excludes canceled disbursements and displays the adjusted Net Packaged amount on the report.

Student Financial Aid History

rpt_faStudentHistory.rpt

ADMINISTRATOR

Campuses:
Campus Management Institute
- School Status (all)

12/26/2012
12:22:18PM

Student Name: Allen, Alan

Student Address

Address: 7800 NW 2nd Ave
City: Boca Raton, FL 3487
Telephone: 5615556655
Work Phone: 5615559988
E-Mail: allena@aol.com
Birth Date: 12/9/1986

Student ID:

Academic Year: 1

Award Year: 2002-03
Academic Year: 1/6/2003 - 8/10/2003
Package Status: Not Packaged
Cost of Attendance: $0.00
Institutional Charges: $0.00
Gross Award Amt: $12,800.00
Net Funding Schedule: $-390.00 Does not include canceled amounts, if any

Package Date:
Packaged EFC:
Model:

Funding Packaged:

Federal Perkins Loan

Fund Source: PERKINS
Funding Status: Canceled
Loan Period: 1/6/2003 - 8/10/2003
Gross Award Amt: $5,000.00
Bank Fee: $250.00
Net Award Amt: $4,750.00
Net Packaged Amt: $-250.00
Amount Received: $0.00
Loan ID:
Prom Note Status:

Program Version: GENBA
School Status: CANCEL
Award Year: 2002-03

Lender: Bank of America
Servicer: CMI Servicer
Guarantor: CMI Guarantor
Origination Status:
Total Disbursement: 2

Disbursements

Disb #	Date	Amount	Status	Term
	1/6/2003	$2,375.00	C	
	4/24/2003	$2,375.00	C	

Federal Stafford Sub Loan

Fund Source: SUB
Funding Status: Canceled
Loan Period: 1/6/2003 - 8/10/2003
Gross Award Amt: $2,800.00
Bank Fee: $140.00
Net Award Amt: $2,660.00

Program Version: GENBA
School Status: CANCEL
Award Year: 2002-03

Lender: Bank of America
Servicer: CMI Servicer
Guarantor: CMI Guarantor

Student Financial Aid Summary

This report provides a summary of each type of funding scheduled. Individual disbursements are not included on this report. Instead, information showing the number of disbursements scheduled, received, and the net amount received are listed.

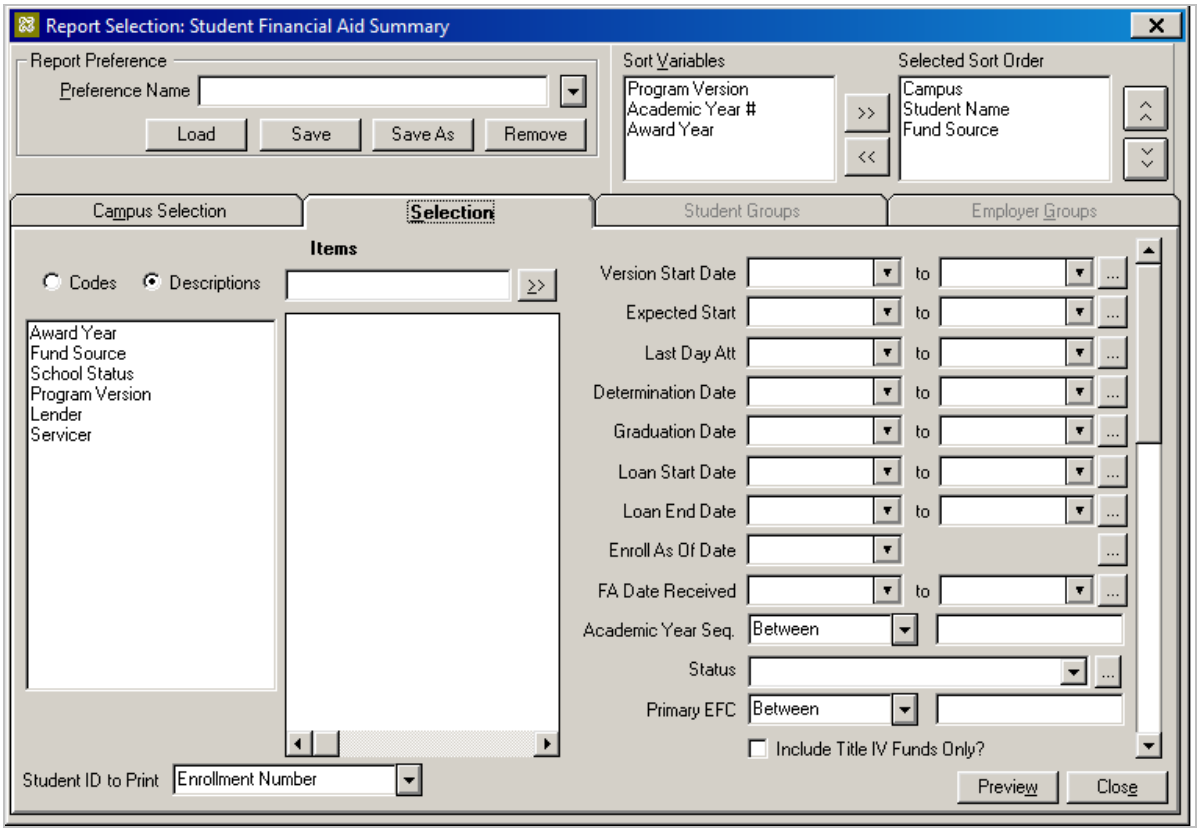
To run the report:

1. Navigate to **Reports > Financial Aid > Student Financial Aid Summary**. The Report Selection: Student Financial Aid Summary form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   In addition to the options visible in the screen capture below, the following options are available:

   - Include Title IV Funds Only?
   - Display Missing FA Documents?
   - Display Application Sent and Received Dates?
   - Include Addl Eligibility Ind. Only?

   Note: The Include Addl Eligibility Ind. Only? check box is disabled by default. This check box becomes enabled when the Fund Source is Pell (and any of the other awards) combined with an Award Year equal to or greater than 2009-10.



4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

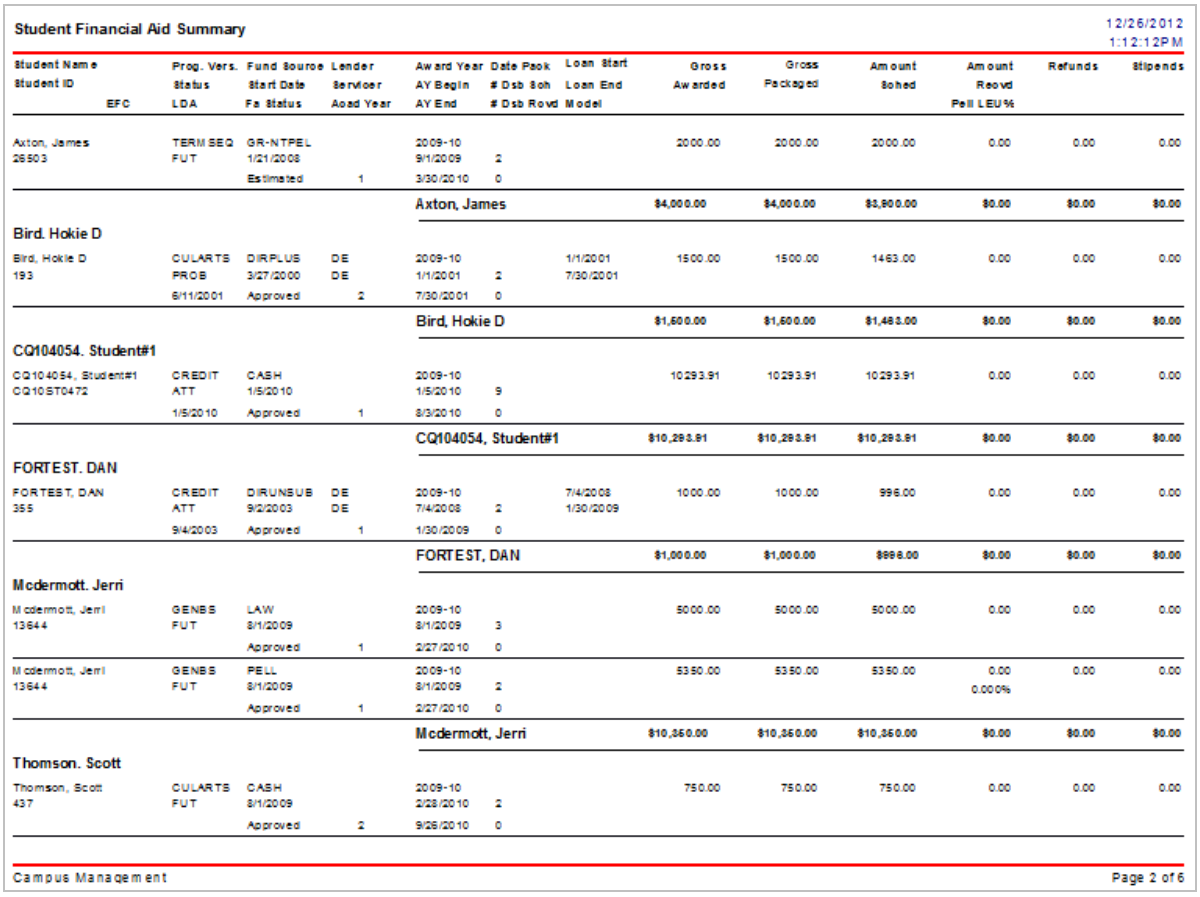
The report includes details of financial aid for each student followed by summaries per fund source. The report displays the following details:

- Student Name
- Student ID
- Program
- Student Status
- Last Date of Attendance (LDA)
- Fund Source
- Academic Year Start Date
- FA Status
- Lender
- Servicer
- Academic Year
- Award Year
- Academic Year Begin Date
- Academic Year End Date
- Date Packaged
- Comments
- Number of Disbursements Scheduled
- Number of Disbursements Received
- Loan Start Date
- Loan End Date
- Model (dependency status)
- Gross Awarded
- Gross Packaged
- Amount Scheduled
- Amount Received
- Refunds
- Stipends

Subtotals and totals are provided on the amount fields.

The Gross Packaged calculation excludes canceled disbursements and displays the adjusted Gross Packaged on the report.

The following is an example of financial aid summaries per student.

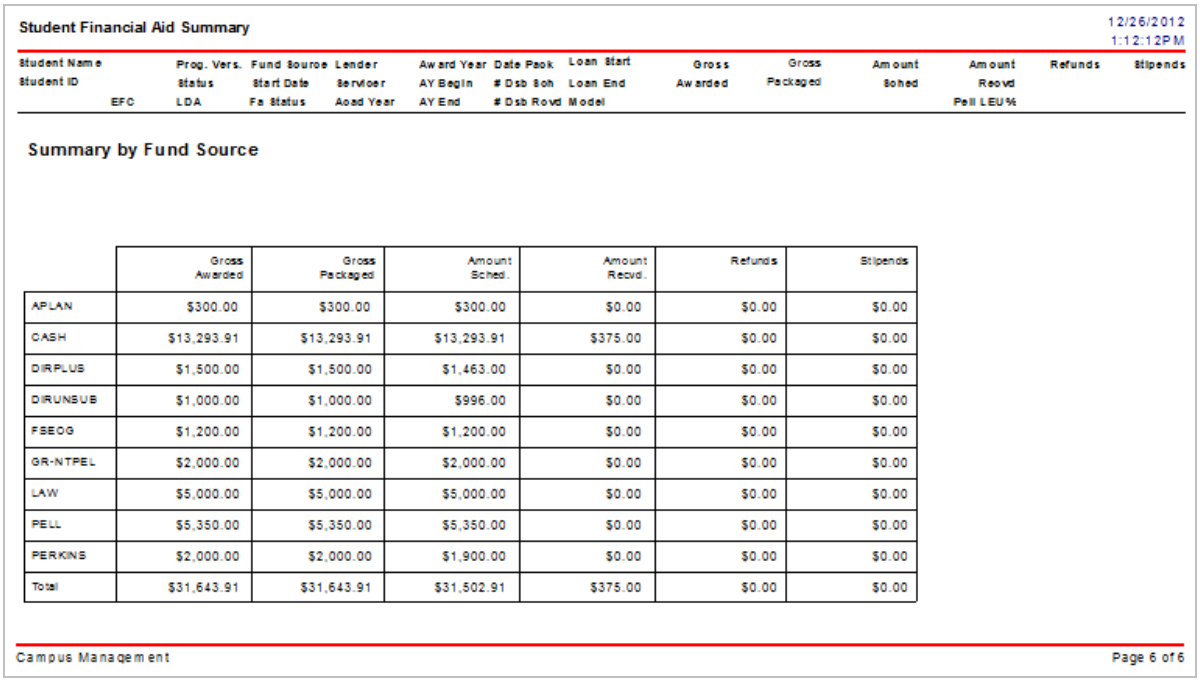


Student Financial Aid Summary 12/26/2012 1:12:12PM

Student Name / Student ID / EFC	Prog. Vers. / Status / LDA	Fund Source / Start Date / Fa Status	Lender / Servicer / Acad Year	Award Year / AY Begin / AY End	Date Pack / # Dsb / # Dsb Rcvd	Loan Start / Loan End / Model	Gross Awarded	Gross Packaged	Amount Sched	Amount Recvd / Pell LEU%	Refunds	Stipends
Axton, James	TERM SEQ	GR-NTPEL		2009-10			2000.00	2000.00	2000.00	0.00	0.00	0.00
26503	FUT	1/21/2008		9/1/2009	2							
		Estimated	1	3/30/2010	0							
				Axton, James			**$4,000.00**	**$4,000.00**	**$3,900.00**	**$0.00**	**$0.00**	**$0.00**
Bird, Hokie D												
Bird, Hokie D	CULARTS	DIRPLUS	DE	2009-10		1/1/2001	1500.00	1500.00	1463.00	0.00	0.00	0.00
193	PROB	3/27/2000	DE	1/1/2001	2	7/30/2001						
	6/11/2001	Approved	2	7/30/2001	0							
				Bird, Hokie D			**$1,500.00**	**$1,500.00**	**$1,463.00**	**$0.00**	**$0.00**	**$0.00**
CQ104054, Student#1												
CQ104054, Student#1	CREDIT	CASH		2009-10			10293.91	10293.91	10293.91	0.00	0.00	0.00
CQ10ST0472	ATT	1/5/2010		1/5/2010	9							
	1/5/2010	Approved	1	8/3/2010	0							
				CQ104054, Student#1			**$10,293.91**	**$10,293.91**	**$10,293.91**	**$0.00**	**$0.00**	**$0.00**
FORTEST, DAN												
FORTEST, DAN	CREDIT	DIRUNSUB	DE	2009-10		7/4/2008	1000.00	1000.00	996.00	0.00	0.00	0.00
355	ATT	9/2/2003	DE	7/4/2008	2	1/30/2009						
	9/4/2003	Approved	1	1/30/2009	0							
				FORTEST, DAN			**$1,000.00**	**$1,000.00**	**$996.00**	**$0.00**	**$0.00**	**$0.00**
Mcdermott, Jerri												
Mcdermott, Jerri	GENBS	LAW		2009-10			5000.00	5000.00	5000.00	0.00	0.00	0.00
13644	FUT	8/1/2009		8/1/2009	3							
		Approved	1	2/27/2010	0							
Mcdermott, Jerri	GENBS	PELL		2009-10			5350.00	5350.00	5350.00	0.00	0.00	0.00
13644	FUT	8/1/2009		8/1/2009	2					0.000%		
		Approved	1	2/27/2010	0							
				Mcdermott, Jerri			**$10,350.00**	**$10,350.00**	**$10,350.00**	**$0.00**	**$0.00**	**$0.00**
Thomson, Scott												
Thomson, Scott	CULARTS	CASH		2009-10			750.00	750.00	750.00	0.00	0.00	0.00
437	FUT	8/1/2009		2/28/2010	2							
		Approved	2	9/26/2010	0							

Campus Management Page 2 of 6

The following is an example of a summary by fund source.



Student Financial Aid Summary 12/26/2012 1:12:12PM

Student Name / Student ID / EFC	Prog. Vers. / Status / LDA	Fund Source / Start Date / Fa Status	Lender / Servicer / Acad Year	Award Year / AY Begin / AY End	Date Pack / # Dsb / # Dsb Rcvd	Loan Start / Loan End / Model	Gross Awarded	Gross Packaged	Amount Sched	Amount Recvd / Pell LEU%	Refunds	Stipends

Summary by Fund Source

	Gross Awarded	Gross Packaged	Amount Sched.	Amount Recvd.	Refunds	Stipends
APLAN	$300.00	$300.00	$300.00	$0.00	$0.00	$0.00
CASH	$13,293.91	$13,293.91	$13,293.91	$375.00	$0.00	$0.00
DIRPLUS	$1,500.00	$1,500.00	$1,463.00	$0.00	$0.00	$0.00
DIRUNSUB	$1,000.00	$1,000.00	$996.00	$0.00	$0.00	$0.00
FSEOG	$1,200.00	$1,200.00	$1,200.00	$0.00	$0.00	$0.00
GR-NTPEL	$2,000.00	$2,000.00	$2,000.00	$0.00	$0.00	$0.00
LAW	$5,000.00	$5,000.00	$5,000.00	$0.00	$0.00	$0.00
PELL	$5,350.00	$5,350.00	$5,350.00	$0.00	$0.00	$0.00
PERKINS	$2,000.00	$2,000.00	$1,900.00	$0.00	$0.00	$0.00
Total	$31,643.91	$31,643.91	$31,502.91	$375.00	$0.00	$0.00

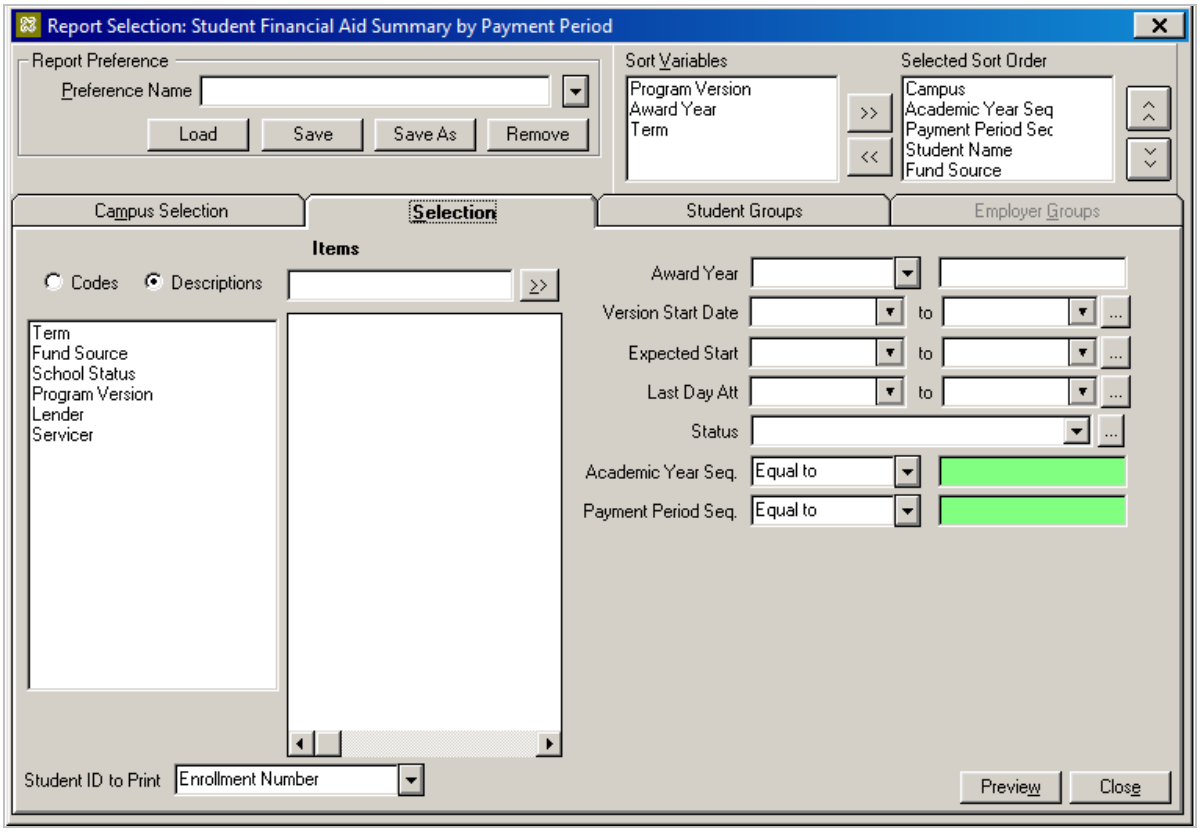
Campus Management Page 6 of 6

Student Financial Aid Summary by Payment Period

The Student Financial Aid Summary by Payment Period report is similar to the Student Financial Aid Summary by Term report, except that Academic Year (AY) and Payment Period (PP) are used as filter criteria instead of Term. Awards are listed for each A/Y or PP selected.

To run the report:

1. Navigate to **Reports > Financial Aid > Student Financial Aid Summary by Payment Period**. The Report Selection: Student Financial Aid Summary by Payment Period form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

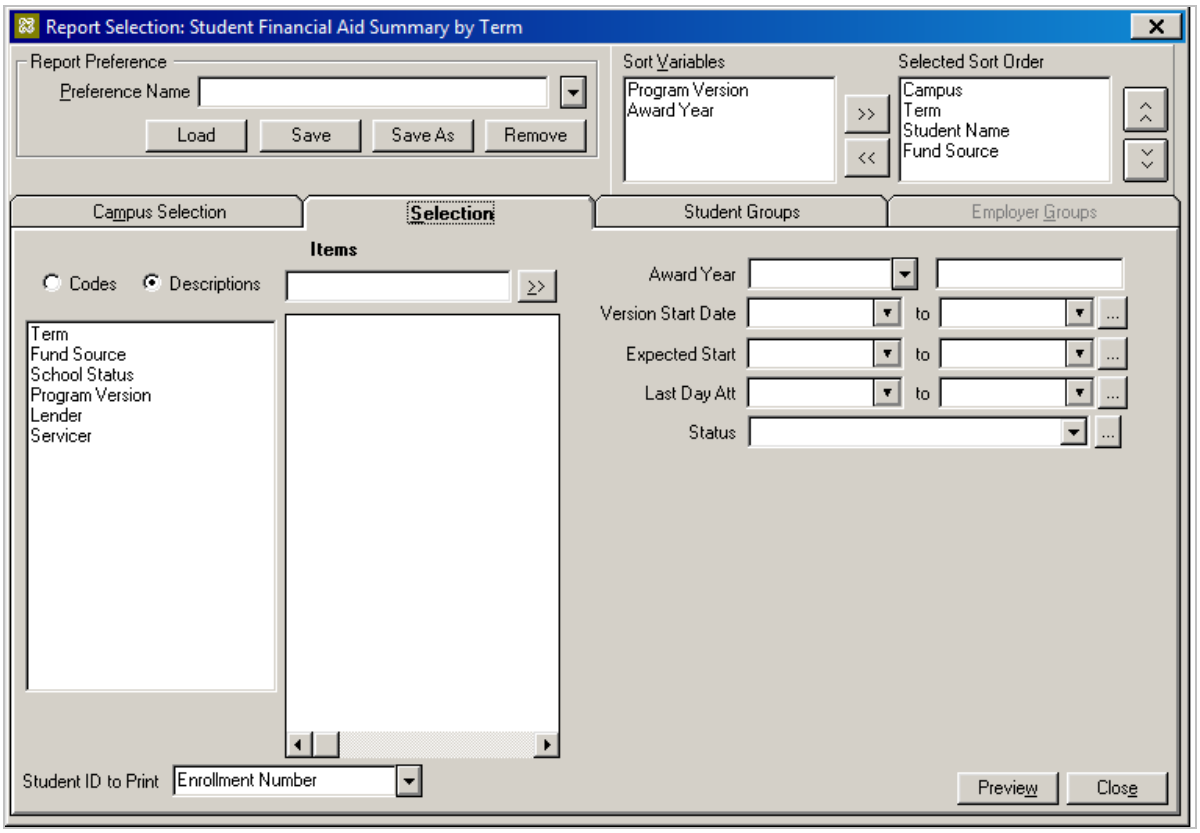
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

Student Financial Aid Summary By Term

This report provides a student-by-student look at financial aid by fund source within terms. The selection criteria for the report enable schools to capture the information required for the Financial Aid Compliance audit.

To run the report:

1. Navigate to **Reports > Financial Aid > Student Financial Aid Summary by Term**. The Report Selection: Student Financial Aid Summary by Term form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

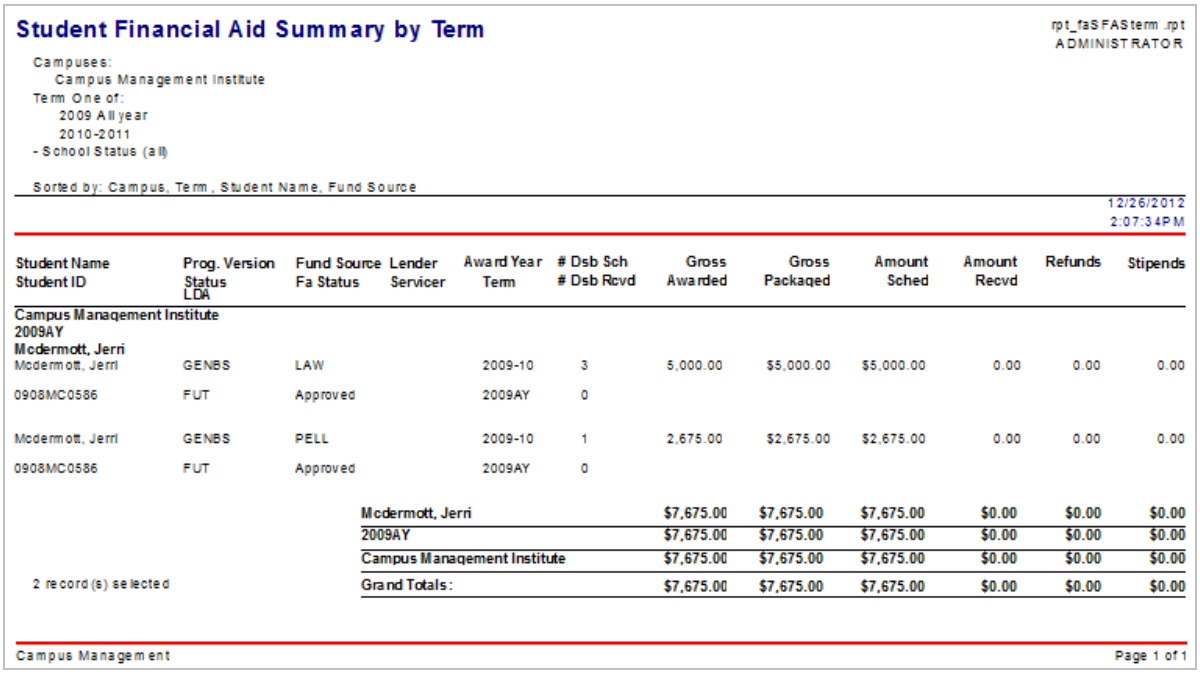
   - Student Name
   - Student ID
   - Program Version
   - Student Status
   - Last Date of Attendance (LDA)

- Fund Source
- FA Status
- Lender
- Servicer
- Award Year
- Term
- Number of Disbursements Scheduled
- Number of Disbursements Received
- Gross Awarded
- Gross Packaged
- Amount Scheduled
- Amount Received
- Pell LEU% (Pell Lifetime Eligibility Used)
- Refunds
- Stipends.

Group and grand totals are provided on the amount columns.

The Gross Awarded, Gross Packaged, Amount Scheduled, Amount Received, Refunds and Stipends for each fund source are displayed at the bottom of the report.

The Amount Scheduled calculation excludes canceled disbursements and displays the adjusted Amount Scheduled on the report.



Student Financial Aid Summary by Term

rpt_faSFASterm.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
Term One of:
2009 All year
2010-2011
- School Status (all)

Sorted by: Campus, Term, Student Name, Fund Source

12/26/2012
2:07:34PM

Student Name / Student ID	Prog. Version / Status / LDA	Fund Source / Fa Status	Lender / Servicer	Award Year / Term	# Dsb Sch / # Dsb Rcvd	Gross Awarded	Gross Packaged	Amount Sched	Amount Recvd	Refunds	Stipends
Campus Management Institute											
2009AY											
Mcdermott, Jerri											
Mcdermott, Jerri	GENBS	LAW		2009-10	3	5,000.00	$5,000.00	$5,000.00	0.00	0.00	0.00
0908MC0586	FUT	Approved		2009AY	0						
Mcdermott, Jerri	GENBS	PELL		2009-10	1	2,675.00	$2,675.00	$2,675.00	0.00	0.00	0.00
0908MC0586	FUT	Approved		2009AY	0						
			Mcdermott, Jerri			**$7,675.00**	**$7,675.00**	**$7,675.00**	**$0.00**	**$0.00**	**$0.00**
			2009AY			**$7,675.00**	**$7,675.00**	**$7,675.00**	**$0.00**	**$0.00**	**$0.00**
			Campus Management Institute			**$7,675.00**	**$7,675.00**	**$7,675.00**	**$0.00**	**$0.00**	**$0.00**
2 record(s) selected			**Grand Totals:**			**$7,675.00**	**$7,675.00**	**$7,675.00**	**$0.00**	**$0.00**	**$0.00**

Campus Management
Page 1 of 1

Students Failing Disbursement Criteria

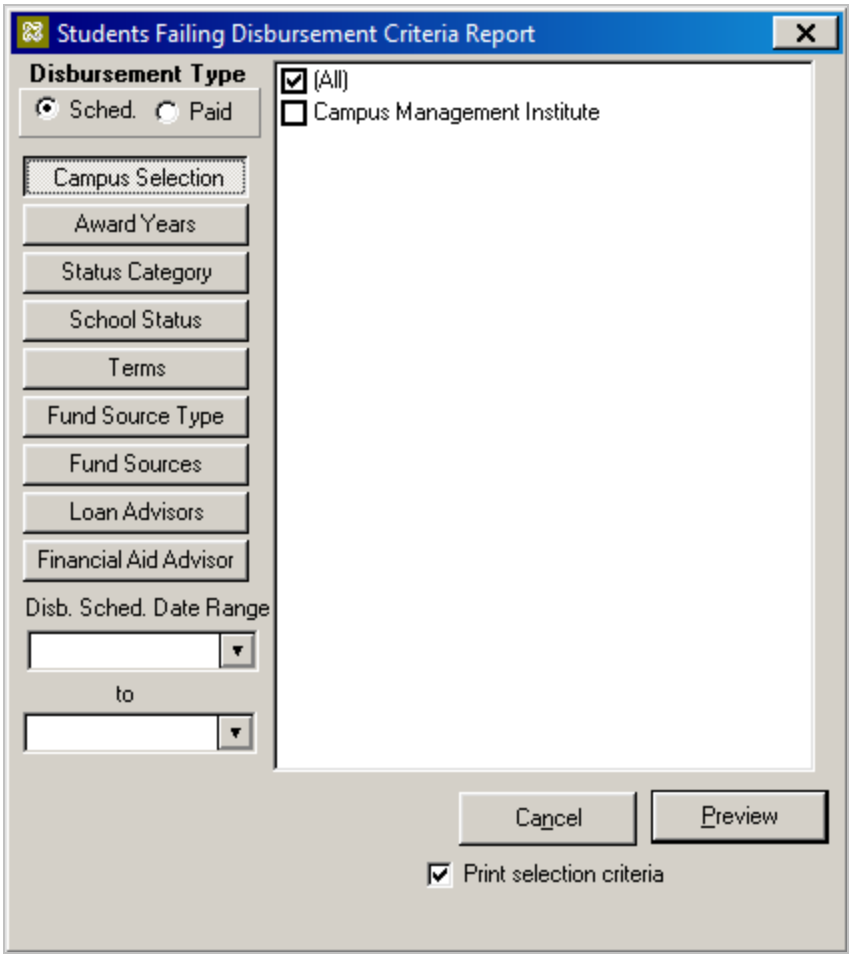
The Students Failing Disbursement Criteria report allows schools to validate posted Financial Aid Disbursement batches against the disbursement approval criteria to verify student eligibility for disbursement batches.

In preparation for an upcoming term schools need to determine which students are "out of compliance" for payment of aid funds, what is missing, and for what term. This report provides a means to determine which students are "out of compliance."

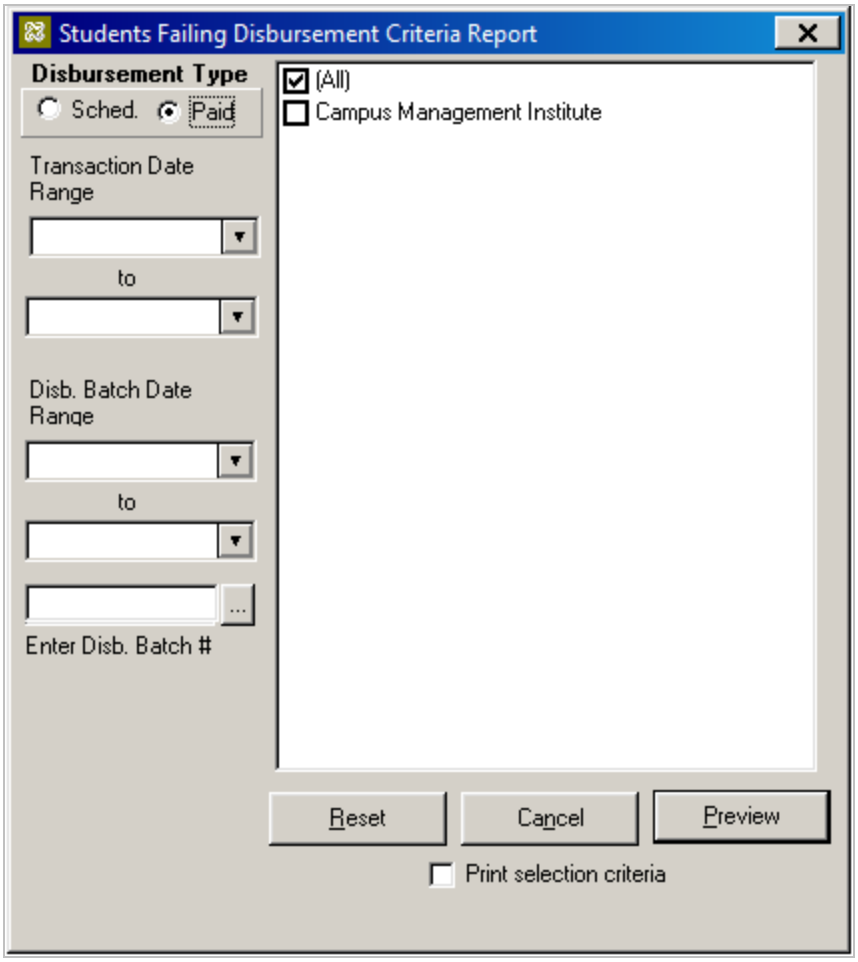
To run the report:

1. Navigate to **Reports > Financial Aid > Students Failing Disbursement Criteria**. The Report Selection: Students Failing Disbursement Criteria form is displayed.
2. Select a **Disbursement Type**.
   - If you select **Scheduled**, you can use the filters shown in the image below.

     When you click a filter button, you can select multiple options. The system defaults to (All) for each filter.



   - If you select **Paid**, you can use the filters shown in the image below.



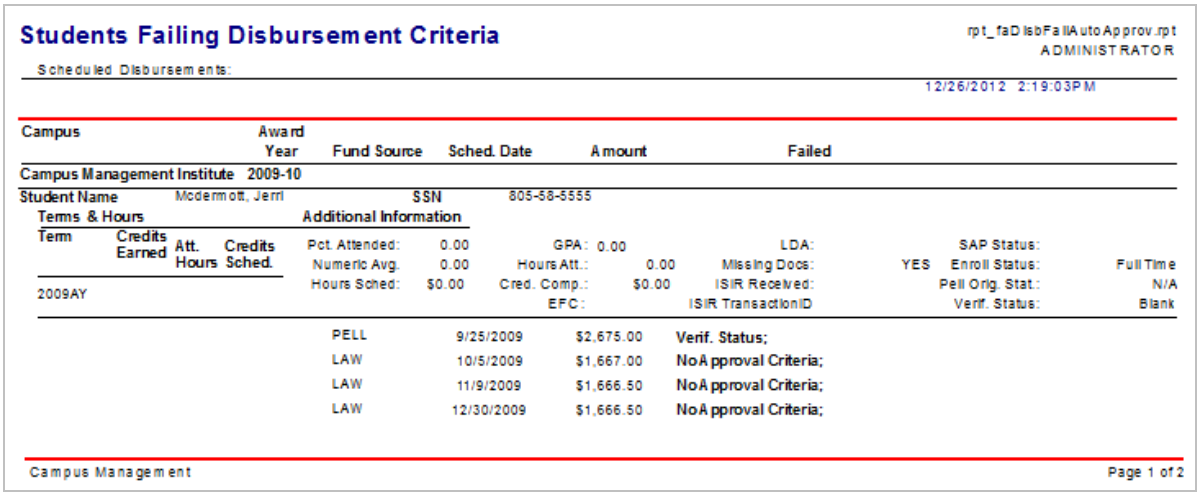
Note: The Batch IDs are in numeric order and are displayed in a multiple select drop-down list. You can select one or multiple batch IDs. If you know the batch number, you can enter it in the Enter Disb. Batch # field.

If only the date appears in the Disbursement Batch Range with no batches selected or no Transaction Date provided, it will take a long time to generate the report.

3. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report header indicates the Disbursement status (Scheduled or Paid), the Batch Date Range, and the Batch ID (if applicable).

   The report details include the academic records for each student.



Students Failing Disbursement Criteria

rpt_faDisbFailAutoApprov.rpt
ADMINISTRATOR

Scheduled Disbursements:

12/26/2012 2:19:03PM

Campus	Award Year	Fund Source	Sched. Date	Amount	Failed
Campus Management Institute	2009-10				

Student Name: Mcdermott, Jerri SSN: 805-58-5555

Terms & Hours

Term	Credits Earned	Att. Hours	Credits Sched.
2009AY			

Additional Information

Pct. Attended:	0.00	GPA:	0.00	LDA:		SAP Status:	
Numeric Avg.	0.00	Hours Att.:	0.00	Missing Docs:	YES	Enroll Status:	Full Time
Hours Sched:	$0.00	Cred. Comp.:	$0.00	ISIR Received:		Pell Orig. Stat.:	N/A
		EFC:		ISIR TransactionID		Verif. Status:	Blank

PELL	9/25/2009	$2,675.00	Verif. Status;
LAW	10/5/2009	$1,667.00	NoApproval Criteria;
LAW	11/9/2009	$1,666.50	NoApproval Criteria;
LAW	12/30/2009	$1,666.50	NoApproval Criteria;

Campus Management Page 1 of 2

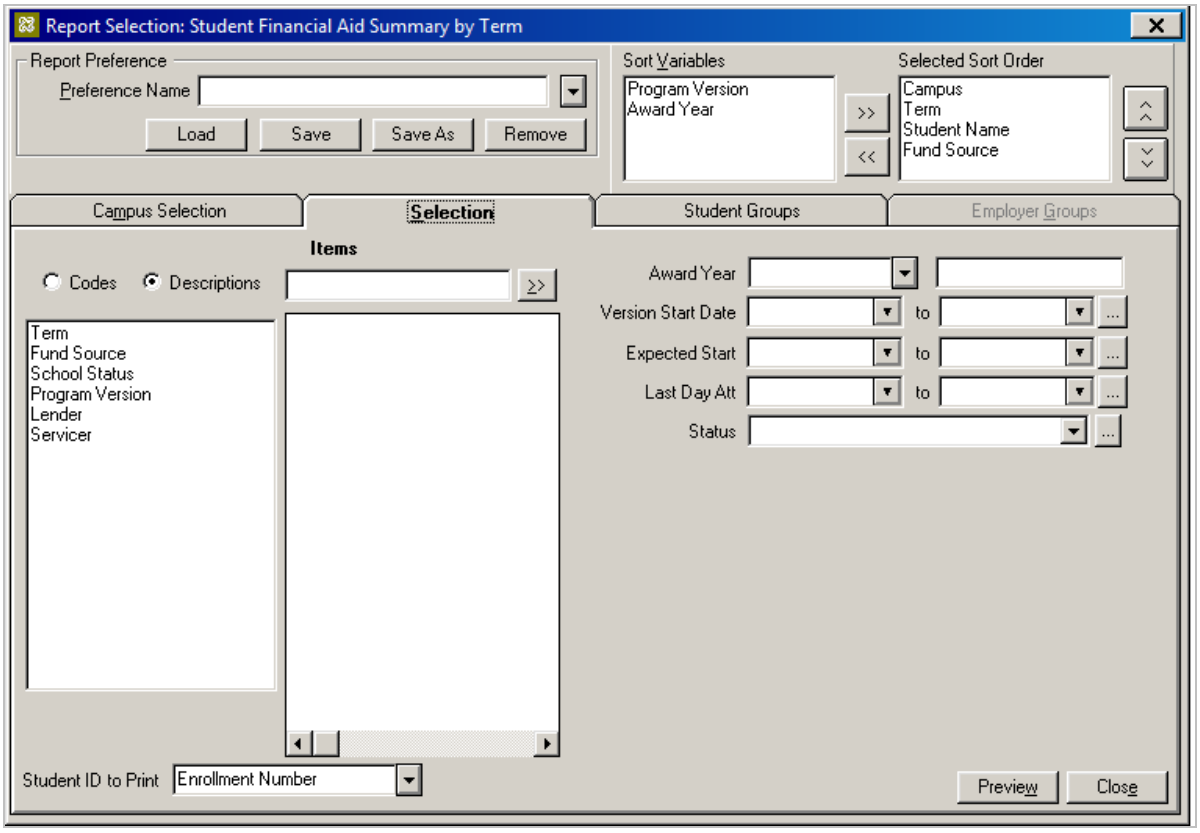
Unmatched ISIRs

The unmatched ISIRs Report is generated for students that do not exist in the CampusNexus Student database. When the ISIR records are imported for those students, CampusNexus Student looks at the ISIR lead flag on Setup > Admissions and selects students as follows:

- If the ISIR lead flag is set to Yes, then the Master File is generated for those students (these students are NOT on Unmatched ISIR Report).
- If the ISIR lead flag is set to No, then the Master File is not generated for those students (these students are on Unmatched ISIR Report).

To run the report:

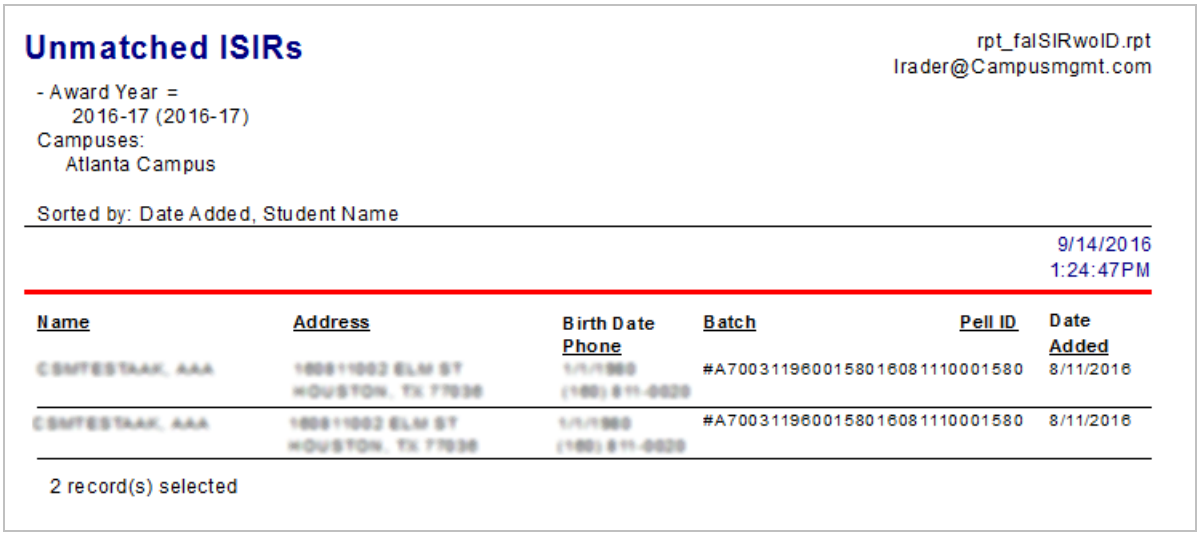
1. Navigate to **Reports > Financial Aid > Unmatched ISIRs**. The Report Selection: Unmatched ISIRs form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.



Unmatched ISIRs

rpt_falSIRwoID.rpt
lrader@Campusmgmt.com

- Award Year =
  2016-17 (2016-17)
Campuses:
  Atlanta Campus

Sorted by: Date Added, Student Name

9/14/2016
1:24:47PM

Name	Address	Birth Date Phone	Batch	Pell ID	Date Added
CSMTESTAAK, AAA	1608 11002 ELM ST HOUSTON, TX 77036	1/1/1980 (160) 811-0020	#A700311960015801608111000 1580		8/11/2016
CSMTESTAAK, AAA	1608 11002 ELM ST HOUSTON, TX 77036	1/1/1980 (160) 811-0020	#A700311960015801608111000 1580		8/11/2016

2 record(s) selected

Student Account Reports

Navigate to **Reports > Student Accounts** to access the following Student Account reports:

- 1098-T Summary Report (2007 and Prior)
- 1098-T Summary Report (2003 to 2007)
- 90/10 Report By Revenue Source
- Account Aging Report
- Account Summary
- ACH Batch Detail
- ACH Batch Report
- Campus Period End Dates
- Cash Drawer Session Report
- Cash Receipts Detail
- Cash Receipts Summary by Fund Source
- Credit Card Transactions
- Detail Subsidiary Transaction Register
- Detail Transaction Register
- Drop Report
- Earned/Prepaid AR Report
- Enrollment Account Balance
- General Ledger Accounts
- General Ledger Posting Detail
- Ledger Card
- Miscellaneous Cash Receipts
- Month End Process Report
- Refund Calculation Summary
- Refund Check Register
- Revenue Detail
- Revenue Earning Exceptions
- Revenue Preliminary
- Revenue Summary
- Scheduled Refunds
- Scheduled Subsidiary Refunds
- Stipend Schedule
- Student Account Balance
- Student Information Statement (2007 and Prior)
- Subsidiaries
- Title IV Credit Balance Report
- Transaction Adjustments
- Accounts Receivable (cube report)
- Bank Deposit Report (cube report)
- Future Charge Verification (cube report)
- Receipts by Source (cube report)
- Revenue Earnings (cube report)

Note: The System Administrator must set up security rights to view, print, or export reports. Staff members and staff groups must be given security rights to view, print, and/or export reports. This does not apply to custom reports.

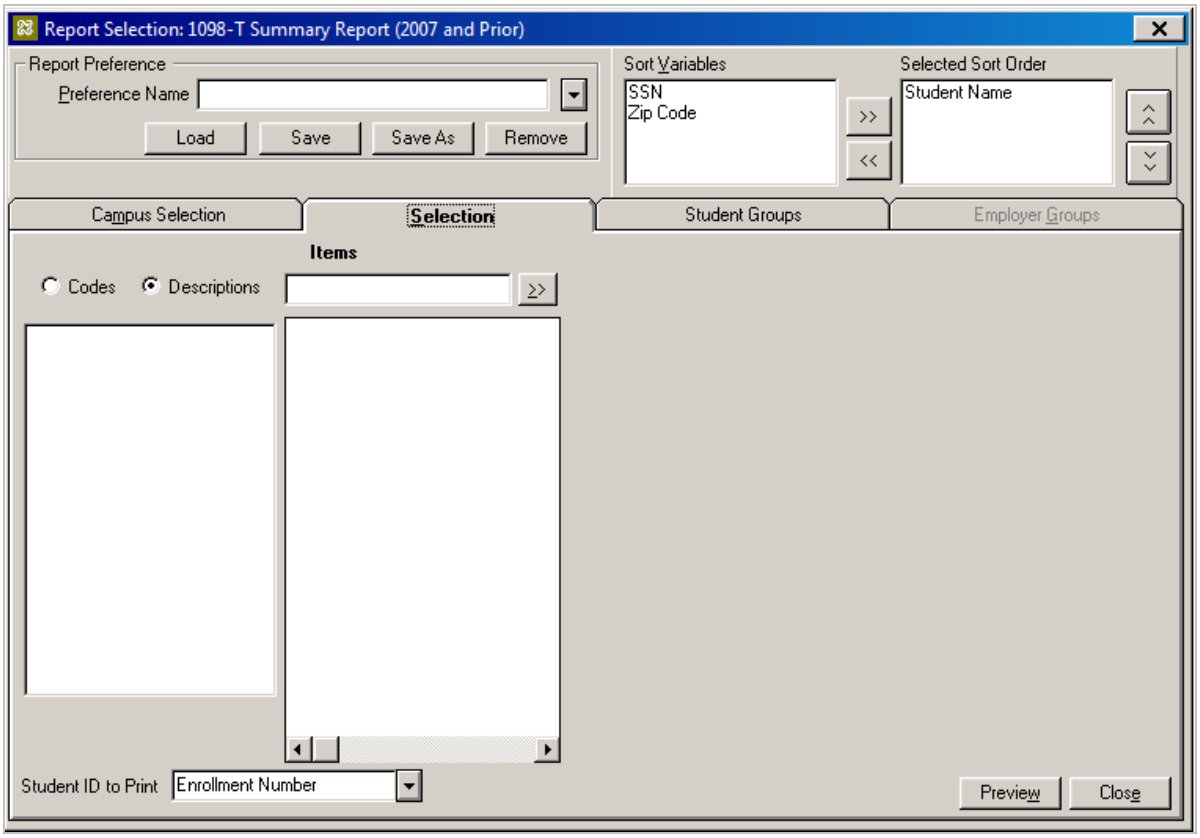
1098-T Summary Report (2007 and Prior)

This report lists all charges, monies received, and monies refunded from some fund sources for the year 2007 and earlier years.

The logic used to identify students that are required for 1098-T reporting is also used in the application under **Daily > Student Accounts > Process 1098-Ts (2007 and Prior)**. It gathers all students who were enrolled in a calendar year.

To run the report:

1. Navigate to **Reports > Student Accounts > 1098-T Summary Report (2007 and Prior)**. The Report Selection: 1098-T Summary Report (2007 and Prior) form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

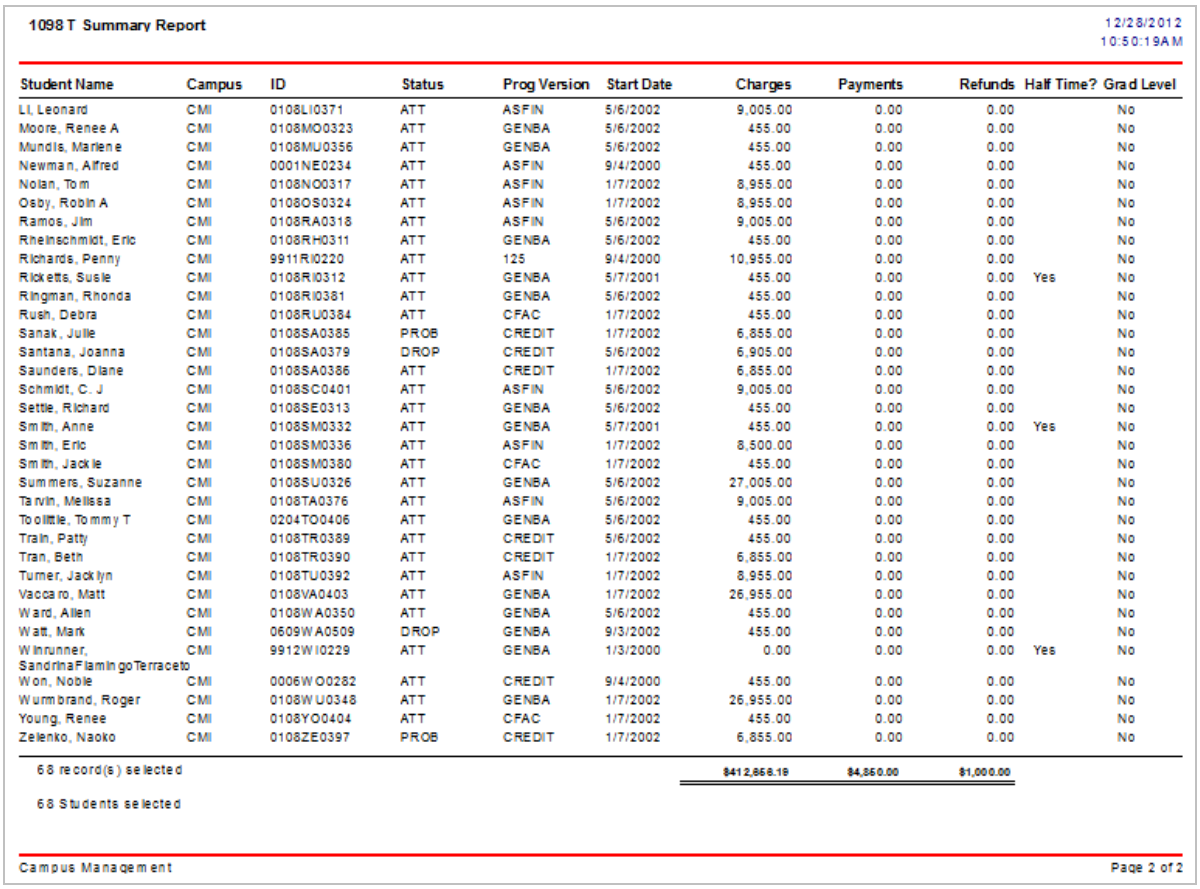
   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Campus
   - ID
   - Enrollment Status

- Program Version
- Start Date
- Charges (Sum of all charges on the student's account)
- Payments (Sum of all payments received on the student's account, excluding all payments where the Fund Source Type is WORKST, GRANT, SCHOLAR, or Pell)
- Refunds (Sum of transactions where the Source is R and the date is within the calendar year. This includes stipends. All transactions where the Fund Source Type is WORKST, GRANT, SCHOLAR, or Pell are excluded.)
- Half Time?
- Graduate Level



1098 T Summary Report

12/28/2012
10:50:19 AM

Student Name	Campus	ID	Status	Prog Version	Start Date	Charges	Payments	Refunds	Half Time?	Grad Level
Li, Leonard	CMI	0108LI0371	ATT	ASFIN	5/6/2002	9,005.00	0.00	0.00		No
Moore, Renee A	CMI	0108MO0323	ATT	GENBA	5/6/2002	455.00	0.00	0.00		No
Mundis, Marlene	CMI	0108MU0356	ATT	GENBA	5/6/2002	455.00	0.00	0.00		No
Newman, Alfred	CMI	0001NE0234	ATT	ASFIN	9/4/2000	455.00	0.00	0.00		No
Nolan, Tom	CMI	0108NO0317	ATT	ASFIN	1/7/2002	8,955.00	0.00	0.00		No
Osby, Robin A	CMI	0108OS0324	ATT	ASFIN	1/7/2002	8,955.00	0.00	0.00		No
Ramos, Jim	CMI	0108RA0318	ATT	ASFIN	5/6/2002	9,005.00	0.00	0.00		No
Rheinschmidt, Eric	CMI	0108RH0311	ATT	GENBA	5/6/2002	455.00	0.00	0.00		No
Richards, Penny	CMI	9911RI0220	ATT	125	9/4/2000	10,955.00	0.00	0.00		No
Ricketts, Susie	CMI	0108RI0312	ATT	GENBA	5/7/2001	455.00	0.00	0.00	Yes	No
Ringman, Rhonda	CMI	0108RI0381	ATT	GENBA	5/6/2002	455.00	0.00	0.00		No
Rush, Debra	CMI	0108RU0384	ATT	CFAC	1/7/2002	455.00	0.00	0.00		No
Sanak, Julie	CMI	0108SA0385	PROB	CREDIT	1/7/2002	6,855.00	0.00	0.00		No
Santana, Joanna	CMI	0108SA0379	DROP	CREDIT	5/6/2002	6,905.00	0.00	0.00		No
Saunders, Diane	CMI	0108SA0386	ATT	CREDIT	1/7/2002	6,855.00	0.00	0.00		No
Schmidt, C. J	CMI	0108SC0401	ATT	ASFIN	5/6/2002	9,005.00	0.00	0.00		No
Settle, Richard	CMI	0108SE0313	ATT	GENBA	5/6/2002	455.00	0.00	0.00		No
Smith, Anne	CMI	0108SM0332	ATT	GENBA	5/7/2001	455.00	0.00	0.00	Yes	No
Smith, Eric	CMI	0108SM0336	ATT	ASFIN	1/7/2002	8,500.00	0.00	0.00		No
Smith, Jackie	CMI	0108SM0380	ATT	CFAC	1/7/2002	455.00	0.00	0.00		No
Summers, Suzanne	CMI	0108SU0326	ATT	GENBA	5/6/2002	27,005.00	0.00	0.00		No
Tarvin, Melissa	CMI	0108TA0376	ATT	ASFIN	5/6/2002	9,005.00	0.00	0.00		No
Toolittle, Tommy T	CMI	0204TO0406	ATT	GENBA	5/6/2002	455.00	0.00	0.00		No
Train, Patty	CMI	0108TR0389	ATT	CREDIT	5/6/2002	455.00	0.00	0.00		No
Tran, Beth	CMI	0108TR0390	ATT	CREDIT	1/7/2002	6,855.00	0.00	0.00		No
Turner, Jacklyn	CMI	0108TU0392	ATT	ASFIN	1/7/2002	8,955.00	0.00	0.00		No
Vaccaro, Matt	CMI	0108VA0403	ATT	GENBA	1/7/2002	26,955.00	0.00	0.00		No
Ward, Allen	CMI	0108WA0350	ATT	GENBA	5/6/2002	455.00	0.00	0.00		No
Watt, Mark	CMI	0609WA0509	DROP	GENBA	9/3/2002	455.00	0.00	0.00		No
Winrunner, SandrinaFlamingoTerraceto	CMI	9912WI0229	ATT	GENBA	1/3/2000	0.00	0.00	0.00	Yes	No
Won, Noble	CMI	0006WO0282	ATT	CREDIT	9/4/2000	455.00	0.00	0.00		No
Wurmbrand, Roger	CMI	0108WU0348	ATT	GENBA	1/7/2002	26,955.00	0.00	0.00		No
Young, Renee	CMI	0108YO0404	ATT	CFAC	1/7/2002	455.00	0.00	0.00		No
Zelenko, Naoko	CMI	0108ZE0397	PROB	CREDIT	1/7/2002	6,855.00	0.00	0.00		No
68 record(s) selected						$412,858.19	$4,850.00	$1,000.00		

68 Students selected

Campus Management

Page 2 of 2

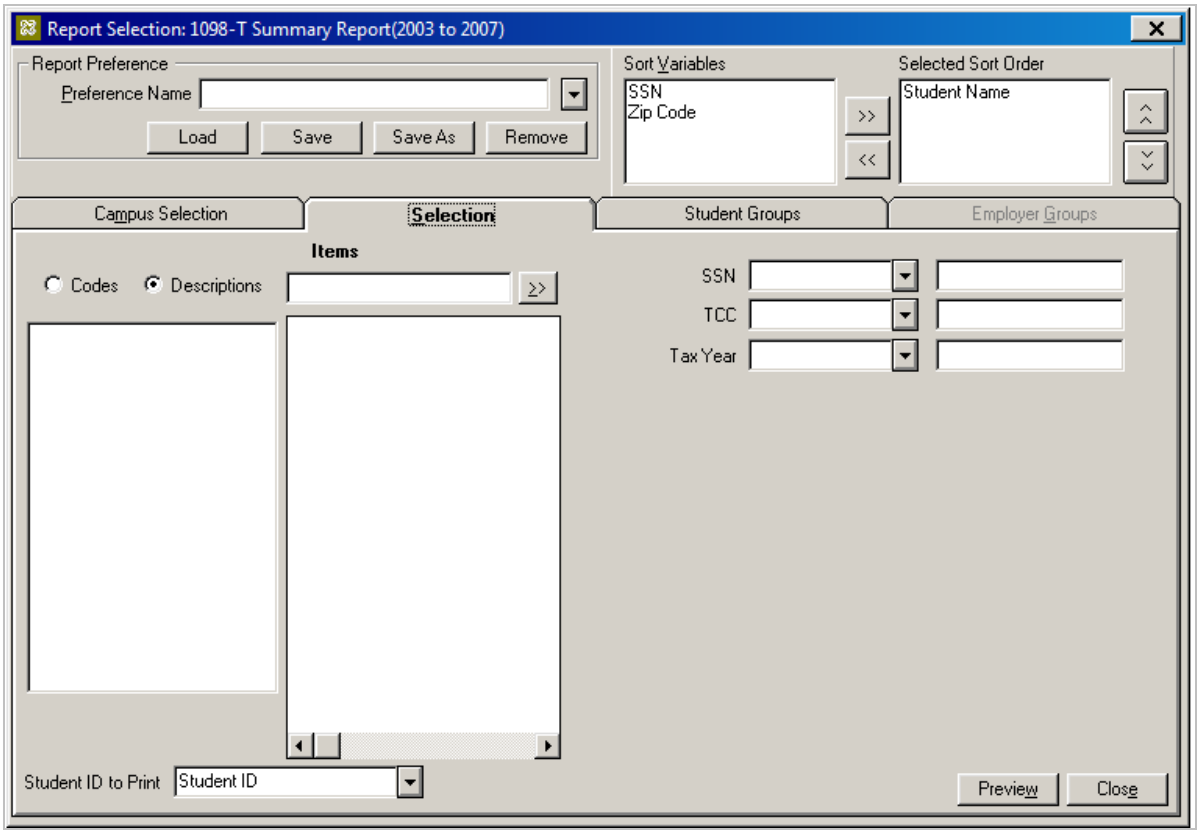
1098-T Summary Report (2003 to 2007)

This report lists all charges, monies received, and monies refunded from some fund sources for the years 2003 to 2007.

The logic used to identify students that are required for 1098-T reporting is also used in the application under **Daily > Student Accounts > Process 1098-Ts (2007 and Prior)**. It gathers all students who were enrolled in a calendar year.

To run the report:

1. Navigate to **Reports > Student Accounts > 1098-T Summary Report (2003 to 2007)**. The Report Selection: 1098-T Summary Report (2003 to 2007) form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

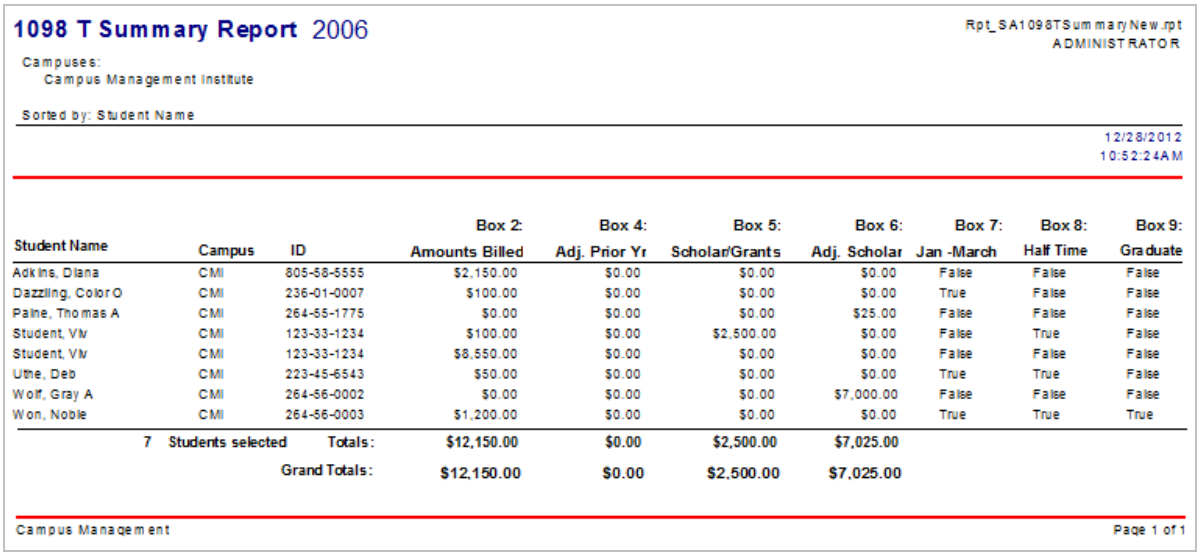
   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Campus
   - ID
   - Amounts Billed

- Adjustment Prior Year
- Scholarships/Grants
- Adjustment Scholarships
- January - March
- Half Time
- Graduate



1098 T Summary Report 2006

Rpt_SA1098TSummaryNew.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute

Sorted by: Student Name

12/28/2012
10:52:24AM

Student Name	Campus	ID	Box 2: Amounts Billed	Box 4: Adj. Prior Yr	Box 5: Scholar/Grants	Box 6: Adj. Scholar	Box 7: Jan -March	Box 8: Half Time	Box 9: Graduate
Adkins, Diana	CMI	805-58-5555	$2,150.00	$0.00	$0.00	$0.00	False	False	False
Dazzling, Color O	CMI	236-01-0007	$100.00	$0.00	$0.00	$0.00	True	False	False
Paine, Thomas A	CMI	264-55-1775	$0.00	$0.00	$0.00	$25.00	False	False	False
Student, Viv	CMI	123-33-1234	$100.00	$0.00	$2,500.00	$0.00	False	True	False
Student, Viv	CMI	123-33-1234	$8,550.00	$0.00	$0.00	$0.00	False	False	False
Uthe, Deb	CMI	223-45-6543	$50.00	$0.00	$0.00	$0.00	True	True	False
Wolf, Gray A	CMI	264-56-0002	$0.00	$0.00	$0.00	$7,000.00	False	False	False
Won, Noble	CMI	264-56-0003	$1,200.00	$0.00	$0.00	$0.00	True	True	True
7 Students selected		Totals:	$12,150.00	$0.00	$2,500.00	$7,025.00			
		Grand Totals:	$12,150.00	$0.00	$2,500.00	$7,025.00			

Campus Management

Page 1 of 1

90-10 Report by Revenue Source

The purpose of the 90-10 calculation is to determine the percentage of revenue received from Federal Student Aid (FSA) funds. These FSA funds are calculated on a student by student basis up to eligible charges, assessed for Eligible Programs and certain qualifying non-eligible programs, determined by an attribute on the Financial Aid Program Version to identify these programs.

Determining Revenue

The 90-10 calculation includes three categories of revenue received during the school's fiscal year (reporting period) and used to satisfy eligible charges defined above. They are payments from:

- Non-Federal Resources
- FSA Funds
- Other Receipts sources (such as cash payments, private educational loans etc)

The 90/10 regulation has a provision which states that Title IV must be included in the calculation regardless of whether the funds are credited to the student's account or paid directly to the student to the extent that charges exist and have not been satisfied with funds received from a non-federal resource such as a state grant.

Stipends as adjustments to revenue

Stipends in the 90-10 calculation are calculated in the similar way as refunds calculation, with the exception of stipends to Title IV funds. If a school grants stipends money to a student from a fund source that is considered to be Other Receipt or Non Federal Resource, then that amount is excluded from the revenue reported for that fund source. However, the 90-10 presumption makes stipends irrelevant for FSA funds except for the stipends being the result of a Title IV Credit balance (which is always excluded from the 90-10 calculation).

Adjustments to revenue received in the prior year

Adjustments in the current year to revenue received that were included in the 90-10 calculation in a previous year are not considered in the 90-10 calculation for the current year. However, this limitation does not apply to Title IV Funds refunded in the current year as a result of a Return of Title IV Calculation defined in Part 668.22 even if the refund is to Title IV revenue received in the previous year. Additionally, it has been observed that some institutions give stipends to students when the funds have not even been posted to the student's account. Adjustments should never be included in the 90-10 calculation unless the source of that stipend is being counted.

Refunds/Revenue Adjustments

Revenue adjustments, including revenue that exceeds eligible charges, are recorded under the Refunds/Revenue Adjustments column. Any revenue adjustments including refunds, SEOG matching and revenue that exceeds eligible charges are included. The amount reported in Refunds/Revenue Adjustments column is the difference between the Payments column and the Total column for the payment being reported.

Title IV Credit Balances

Under the Cash Basis of Accounting, the revenue is counted for the year in which it was received. Title IV Credit balances are excluded as revenue. However, if in a subsequent year, charges are posted that eliminate the prior year Title IV Credit Balance, then the revenue is counted for that year in which the charges were assessed, not for the year in which the revenue was received. Based on an extreme literal interpretation of the principles underlying the cash basis of accounting, it can be interpreted, that the revenue in this case can not be included in either year. According to the Department of Education, this extremely literal interpretation is an impermissible interpretation of the principles governing the cash basis of accounting since it ignores the context of the 90-10 rule and produces an absurd result where the funds would never be counted.

Application of Funds

The impact of the 90-10 presumption and the exclusion to that presumption for revenue from non-federal resources means that regardless of the order that transactions occur on the student's account, the revenue will be counted in the formula based on the

category for which the revenue belongs. In other words, revenue from Non-Federal Resources are counted first, then FSA funds are counted and then revenue from the third category Other Receipts.

90-10 Calculation

Non-Federal Resources

The calculation first considers the revenue from Non-Federal Resources and uses the information to satisfy eligible charges such including:

- State Grants
- Grants from private sources
- Job training
- Institutional scholarships that count toward the 10% revenue requirement
- Other Non Federal Resource attribute may be available on the Fund Source Code. For additional information, see Financial Aid Lists [Fund Source].

Title IV fund sources

After considering the payments from Non-Federal Resources if there are still unsatisfied charges, the calculation considers revenue from payments received from Title IV fund sources. Revenue from Title IV funds includes PELL, SEOG (Exclude Institutional Match), TEACH, and Direct Loans. Federal Work Study (FWS) is not included in this category.

Other Receipts

If there is still a remaining balance of unpaid eligible charges, then include revenue from Other Receipts, revenue derived from funds that are not Non-Federal Resources or Title IV. Revenue received from Student Payments, Private Educational Loans are limited.

Amount from School Activities Revenue include Funds received by the institution for academically related activities. These are funds that an institution may count in the denominator of the calculation (not on a student by student basis) when the institution collects money for academically related activities. For example, a culinary institution can offer food cooked by students, studying to be chefs, if this activity is required as part of the program and supervised by an instructor. Include as School Activities Revenue in 90/10 option on the transaction code must be selected. This revenue amount is entered as miscellaneous receipts and is not reported for individual students but rather as a separate revenue category in the report's summary. There is a configuration on the Transaction Code to identify this revenue type of revenue. For additional information, see Setup - Student Account Lists [Transaction Codes].

Calculate and report for Eligible Programs and Non-Eligible Programs

To calculate 90-10 percentage for students with both a Title IV degree program and a non-Title IV Non-Degree Seeking (NDS) program during the 90-10 report audit period, the denominator of the non-Title IV Non-Degree Seeking program(s) is calculated separately and then correctly combined with the denominator of the Title IV program(s) to correctly calculate the 90-10 Revenue Percentage for the student.

90-10 Calculation	Definition
90-10 denominator	Includes payments received during the reporting year used to satisfy eligible charges. The amount is capped by those eligible charges. The denominator can also include prior year amounts that were credit balances in the prior year are now counted in the current year when the charges were posted.
90/10 numerator	Includes the amount of Title IV payments (revenue) reported in the denominator.

All revenue calculated in the above information is included in the denominator of the calculation. The portion of the denominator that is derived from FSA funds is included in the numerator.

Calculate and report based on enrollment at institution when student enrolled in multiple campuses

When running 90/10 Report by Revenue Source for multiple campuses, the students who are enrolled at multiple campuses no longer have their 90/10 data calculated separately for each campus. The transactions are combined (regardless whether or not the enrollment has transactions in the reporting period) before calculating individual amounts (carryover charges, eligible charges in the period, payments in each payment category) for 90/10 purposes. All transactions associated with the selected campus(es) from all of the student's enrollments such as:

- Students with only one enrollment
- Students with multiple enrollments at the same campus. Transactions from all enrollments must be combined before calculating 90/10 amounts.
- Students with multiple enrollments at multiple campuses. Combine all transactions associated with the specified campus(es) from all of the student's enrollments before calculating 90/10 amounts.

For students who are enrolled in both Title IV and non-Title IV programs, the report calculates and report students' 90/10 data separately for each program type. the hierarchy for application of funds (which funds to apply first satisfy charges) remains the same.

Eligible Institutional Charges

Eligible Charges are identified by enabling the Include in Title IV Institutional Charges option while configuring Transaction Code. For additional information, see Setup - Student Account Lists [Transaction Codes].

Carryover Charges

Calculate balance of unpaid institutional charges for the student as of the first day of the current reporting period. If this balance is less than 0, then the carryover charge is 0.

1. Calculate the eligible charges from the beginning of the student's program until the last day of the previous reporting period.
2. Subtract all payments used to satisfy the charges in Step 1 for the same period identified above.

If the amount is not 0 or a negative amount it is considered a carryover charge. Amounts that are adjustments such as voided transactions are reduced from the amount to carryover.

Current Year Charges

This amount is the amount of eligible charges for the current year. Adjustments such as voided transactions are reduced from the current year charges.

Total Available Institutional Charges

This is the sum of the current year charges and the carryover charges as defined above. It is the amount to which the revenue considered is limited in the calculation. Refer to the example mentioned below:

Available Institutional Charges	Amount (example)	Explanation
Carryover Charges	$6,189.74	Carryover charges calculation should include transactions from all enrollments and campuses.

Available Institutional Charges	Amount (example)	Explanation
Current Period Eligible Charges	$6,065.00	Eligible charges calculation should include eligible charges from all enrollments and campuses.
Total Eligible Charges	$12,254.74	The sum of Carryover Charges and Current Year Charges
Payments	$6,000.00	Payments calculation for each bucket should include payments from all enrollments and campuses.
Denominator		Denominator is the payments in the period capped by eligible charges in the period. For this example, the total payments in the period is $6000, therefore, all of the payments are counted in determining the denominator. However, if the total amount of the payments is greater than the eligible charges in the period (let's say $15,000.00), then the denominator will be capped by the eligible charges, which is $12,254.74 instead.
Numerator	$0.00	The numerator is the amount is the Title IV portion out of all the payments. For this example, since all the payments are non-title IV, that's why numerator is $0. If out of $6,000 payments, some of which is Title IV (let's say $2,500), then the numerator will be $2,500 instead.
Percentage		The percentage is the amount reported in the numerator divided by the amount reported in the denominator. Since in this example none of the revenue was from a Title IV source, both the percentage is 0%

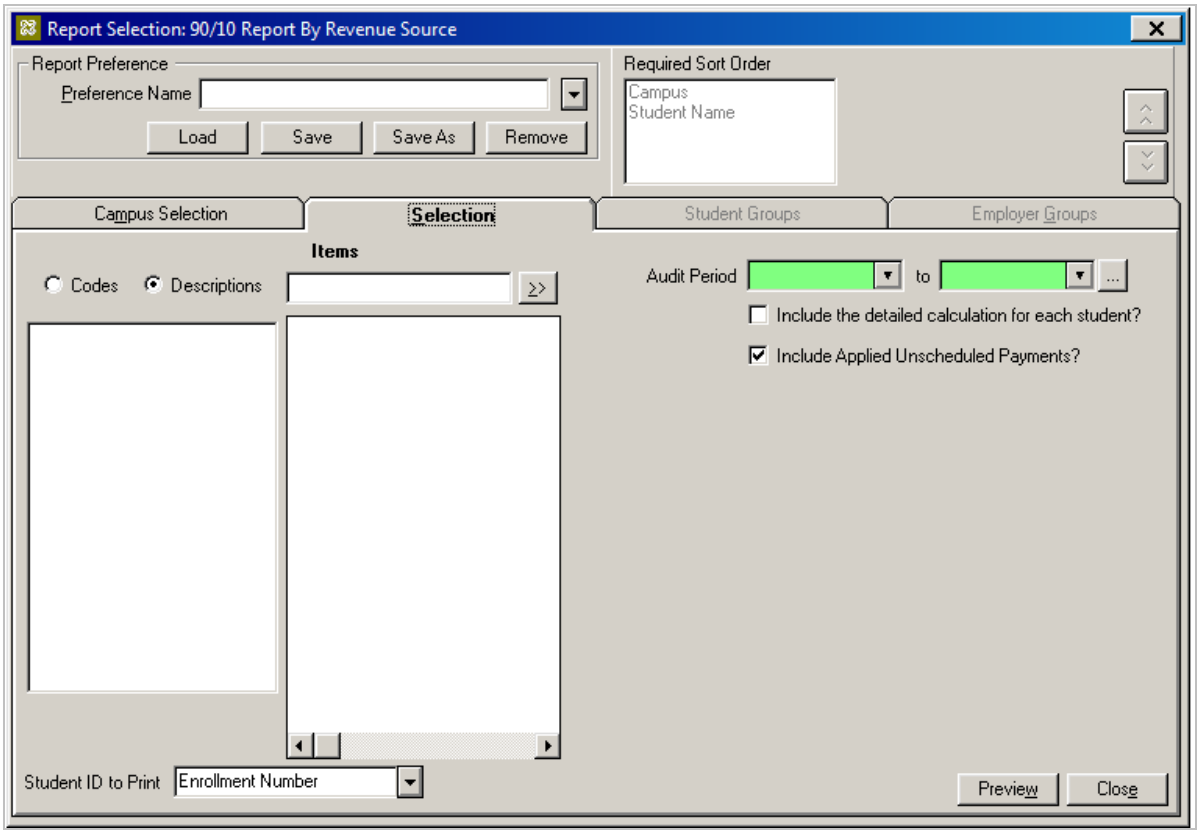
To run the report:

1. Navigate to **Reports > Student Accounts > 90/10 Report by Revenue Source**. The Report Selection: 90/10 Report by Revenue Source form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Notes:

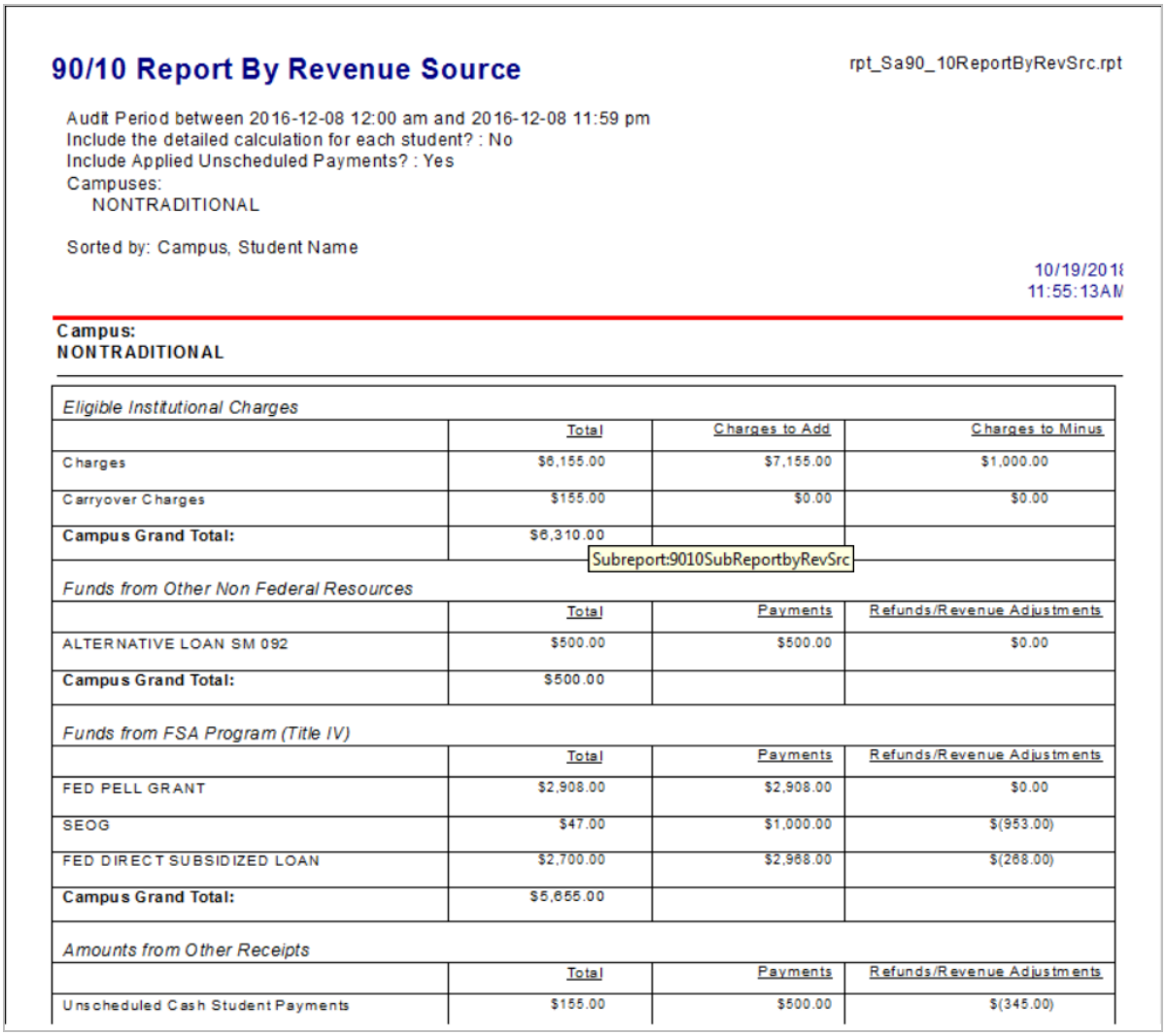
   - When the 'Include the detailed calculation for each student' option is cleared, the report displays revenue data by campus and provides an overall total.
   - The 'Include Applied Unscheduled Payments' option is selected by default. This functionality applies only to unscheduled payments not tied to a fund source. These payments are treated as Cash (Other Receipts) payments for 90/10 processing.

     The existing 90/10 Report calculations for the fund sources reported are not adjusted for the 'Other Receipts' column on the 90/10 Report.



4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The following are report examples. The first example excludes detailed calculations for each student. The second example includes detailed calculations for each student.



90/10 Report By Revenue Source

rpt_Sa90_10ReportByRevSrc.rpt

Audit Period between 2016-12-08 12:00 am and 2016-12-08 11:59 pm
Include the detailed calculation for each student? : No
Include Applied Unscheduled Payments? : Yes
Campuses:
NONTRADITIONAL

Sorted by: Campus, Student Name

10/19/2018
11:55:13AM

Campus:
NONTRADITIONAL

Eligible Institutional Charges

	Total	Charges to Add	Charges to Minus
Charges	$6,155.00	$7,155.00	$1,000.00
Carryover Charges	$155.00	$0.00	$0.00
Campus Grand Total:	$6,310.00		

Subreport:9010SubReportbyRevSrc

Funds from Other Non Federal Resources

	Total	Payments	Refunds/Revenue Adjustments
ALTERNATIVE LOAN SM 092	$500.00	$500.00	$0.00
Campus Grand Total:	$500.00		

Funds from FSA Program (Title IV)

	Total	Payments	Refunds/Revenue Adjustments
FED PELL GRANT	$2,908.00	$2,908.00	$0.00
SEOG	$47.00	$1,000.00	$(953.00)
FED DIRECT SUBSIDIZED LOAN	$2,700.00	$2,968.00	$(268.00)
Campus Grand Total:	$5,655.00		

Amounts from Other Receipts

	Total	Payments	Refunds/Revenue Adjustments
Unscheduled Cash Student Payments	$155.00	$500.00	$(345.00)

The following report example includes detailed calculations for each student.

90/10 Report By Revenue Source

rpt_Sa90_10ReportByRevSrc.rpt

Audit Period between 2016-12-08 12:00 am and 2016-12-08 11:59 pm
Include the detailed calculation for each student? : Yes
Include Applied Unscheduled Payments? : Yes
Campuses:
NONTRADITIONAL

Sorted by: Campus, Student Name

10/19/2018
11:52:50AM

Campus:
NONTRADITIONAL

TESTSIX, STUDENT

Title IV Eligible Program

Eligible Institutional Charges

	Total	Charges to Add	Charges to Minus
Charges	$6,000.00	$7,000.00	$1,000.00
Carryover Charges	$155.00	$0.00	$0.00
Grand Total:	$6,155.00		

Funds from Other Non Federal Resources

	Total	Payments	Refunds/Revenue Adjustments
ALTERNATIVE LOAN SM 092	$500.00	$500.00	$0.00
Grand Total:	$500.00		

Funds from FSA Program (Title IV)

	Total	Payments	Refunds/Revenue Adjustments
FED PELL GRANT	$2,908.00	$2,908.00	$0.00
SEOG	$47.00	$1,000.00	$(953.00)
FED DIRECT SUBSIDIZED LOAN	$2,700.00	$2,968.00	$(268.00)
Grand Total:	$5,655.00		

Amounts from Other Receipts

	Total	Payments	Refunds/Revenue Adjustments
VVV	$0.00	$1,000.00	$(1,000.00)
Grand Total:	$0.00		

Non-Title IV Eligible Program

Eligible Institutional Charges

Account Aging Report

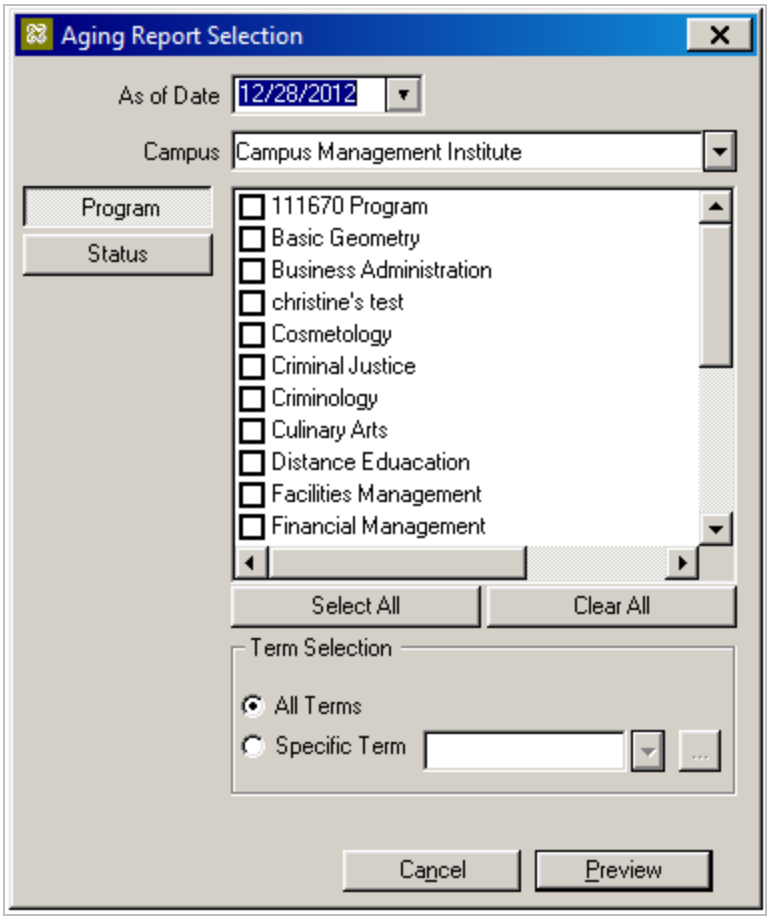
This report provides a summary of aged student accounts receivable. One detail line is listed on the report for each student enrollment.

To calculate the aging balances, there are five calculations (one for each time frame) for each student. All transactions 30 days or less from the Aging date are placed in the 0-30 category. To calculate the aged balance all transaction records with type D (debits) or I (invoices) are added. All transaction records with type C (credits) or P (payments) are subtracted.

To run the report:

1. Navigate to **Reports > Student Accounts > Account Aging Report**. The Aging Report Selection form is displayed.
2. Select appropriate options in the **As of Date**, **Campus**, **Program** or **Status**, and **Term** fields.

   Note: If a Status category is selected, the student's status as of the aging date needs to be determined. This is done by looking at the student record in the SyStatChange table where the effective date is closest to but not greater than the aging date.

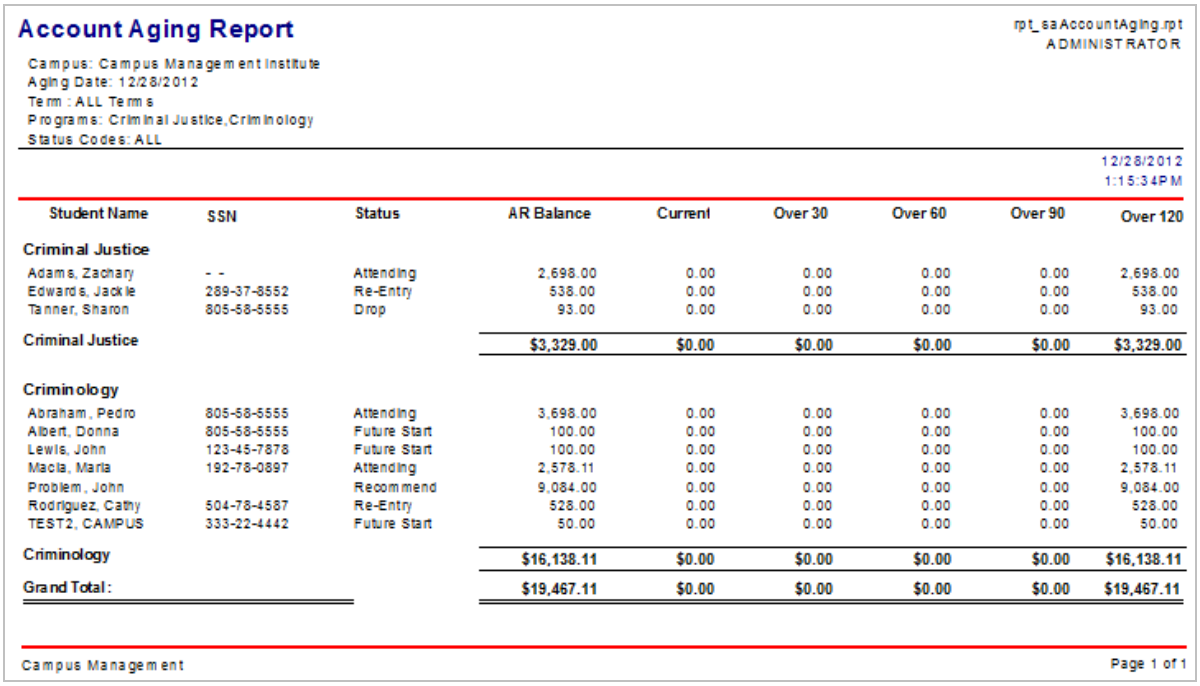


3. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

- Student Name
- SSN
- Enrollment Status
- AR Balance
- Current (0-60)
- Over 30
- Over 60
- Over 90
- Over 120

The report is sorted by Student within Program. Grand totals for each age range are listed at the bottom of the report.



Account Aging Report

rpt_saAccountAging.rpt
ADMINISTRATOR

Campus: Campus Management Institute
Aging Date: 12/28/2012
Term : ALL Terms
Programs: Criminal Justice,Criminology
Status Codes: ALL

12/28/2012
1:15:34PM

Student Name	SSN	Status	AR Balance	Current	Over 30	Over 60	Over 90	Over 120
Criminal Justice								
Adams, Zachary	- -	Attending	2,698.00	0.00	0.00	0.00	0.00	2,698.00
Edwards, Jackie	289-37-8552	Re-Entry	538.00	0.00	0.00	0.00	0.00	538.00
Tanner, Sharon	805-58-5555	Drop	93.00	0.00	0.00	0.00	0.00	93.00
Criminal Justice			**$3,329.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$3,329.00**
Criminology								
Abraham, Pedro	805-58-5555	Attending	3,698.00	0.00	0.00	0.00	0.00	3,698.00
Albert, Donna	805-58-5555	Future Start	100.00	0.00	0.00	0.00	0.00	100.00
Lewis, John	123-45-7878	Future Start	100.00	0.00	0.00	0.00	0.00	100.00
Macia, Maria	192-78-0897	Attending	2,578.11	0.00	0.00	0.00	0.00	2,578.11
Problem, John		Recommend	9,084.00	0.00	0.00	0.00	0.00	9,084.00
Rodriguez, Cathy	504-78-4587	Re-Entry	528.00	0.00	0.00	0.00	0.00	528.00
TEST2, CAMPUS	333-22-4442	Future Start	50.00	0.00	0.00	0.00	0.00	50.00
Criminology			**$16,138.11**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$16,138.11**
Grand Total:			**$19,467.11**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$19,467.11**

Campus Management

Page 1 of 1

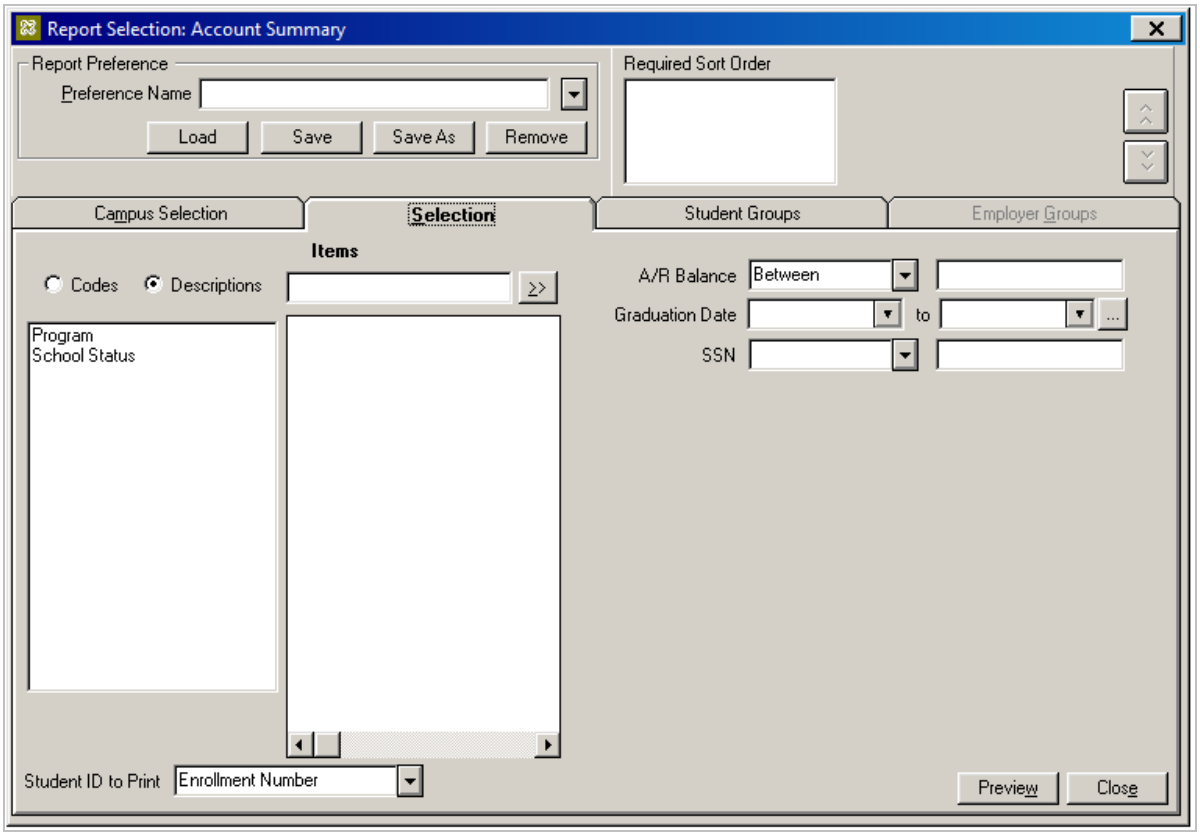
Account Summary

This report provides a student account summary. It includes balances for each enrollment, transaction detail, expected funding, and a transaction code (category) breakdown.

To run the report:

1. Navigate to **Reports > Student Accounts > Account Summary**. The Report Selection: Account Summary form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Note: When you enter a Social Security Number, a report for a single student is produced.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   You can create student groups and - with the Student Groups tab remaining enabled - change your Campus selections, use your saved Report Preferences, and preview the report created to verify that the report matches your selection criteria before exporting your report to various formats, including Excel and XML.

   Additionally, you can make student groups inactive. To do so, click 'Edit' and clear the Active check box. When go back to the Report Selection form and click the Student Groups tab, the 'inactive' student group will no longer appear.

   Notes:

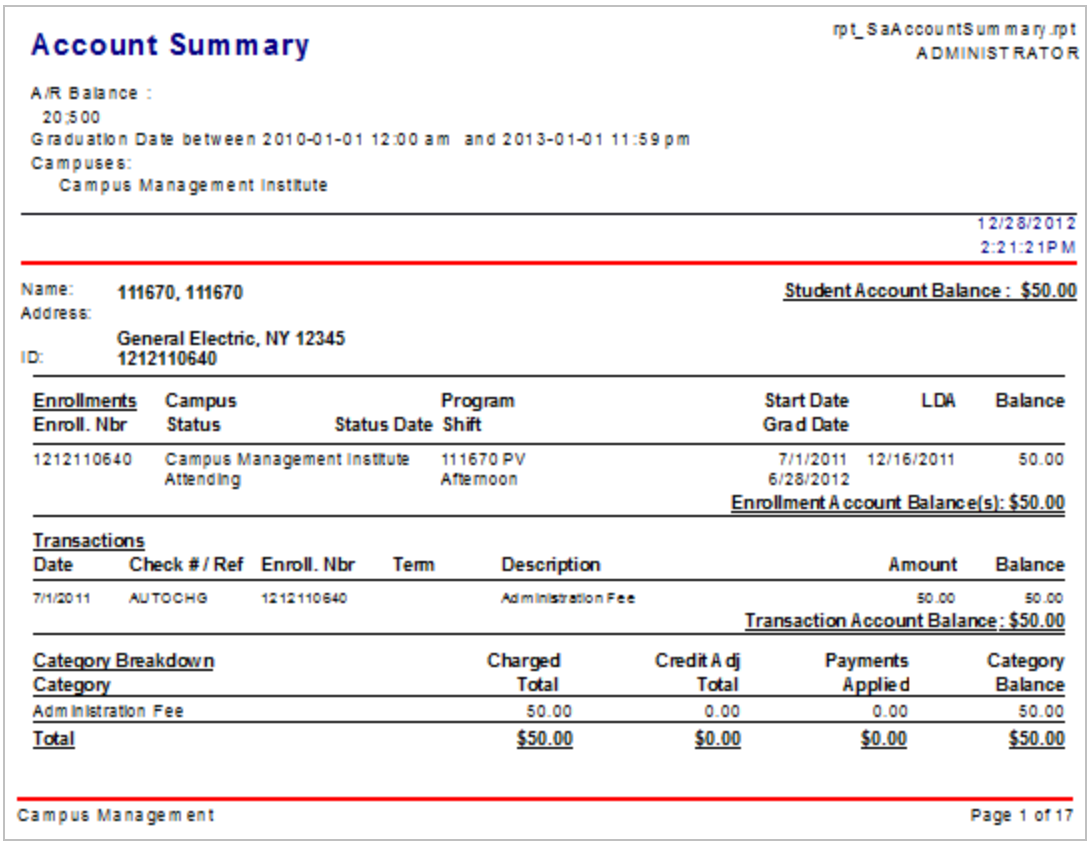
- If you filter data by Student Groups, the Selection tab filters do not apply.
- This type of report is based on a *view* of the pre-selected group of students. The report only uses the student group because it saves the query used when the student group is created.
- You can also have a report based on a *stored procedure*. This type of report allows the use of the Student Group tab and the report selection criteria.
- You can obtain different results for the same report depending upon whether it is a report based on a view or stored procedure.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report is sorted by Student Name. Each student begins on a new page.

   The report displays the following details:

   - Balance summary by enrollment
   - List of all transactions in date order with a total
   - Summary by transaction code (category) with totals.



Account Summary

rpt_SaAccountSummary.rpt
ADMINISTRATOR

A/R Balance :
20;500
Graduation Date between 2010-01-01 12:00 am and 2013-01-01 11:59 pm
Campuses:
Campus Management Institute

12/28/2012
2:21:21PM

Name: 111670, 111670
Address: General Electric, NY 12345
ID: 1212110640

Student Account Balance : $50.00

Enrollments Enroll. Nbr	Campus Status	Status Date	Program Shift	Start Date Grad Date	LDA	Balance
1212110640	Campus Management Institute Attending		111670 PV Afternoon	7/1/2011 6/28/2012	12/16/2011	50.00

Enrollment Account Balance(s): $50.00

Transactions

Date	Check # / Ref	Enroll. Nbr	Term	Description	Amount	Balance
7/1/2011	AUTOCHG	1212110640		Administration Fee	50.00	50.00

Transaction Account Balance: $50.00

Category Breakdown Category	Charged Total	Credit Adj Total	Payments Applied	Category Balance
Administration Fee	50.00	0.00	0.00	50.00
Total	$50.00	$0.00	$0.00	$50.00

Campus Management
Page 1 of 17

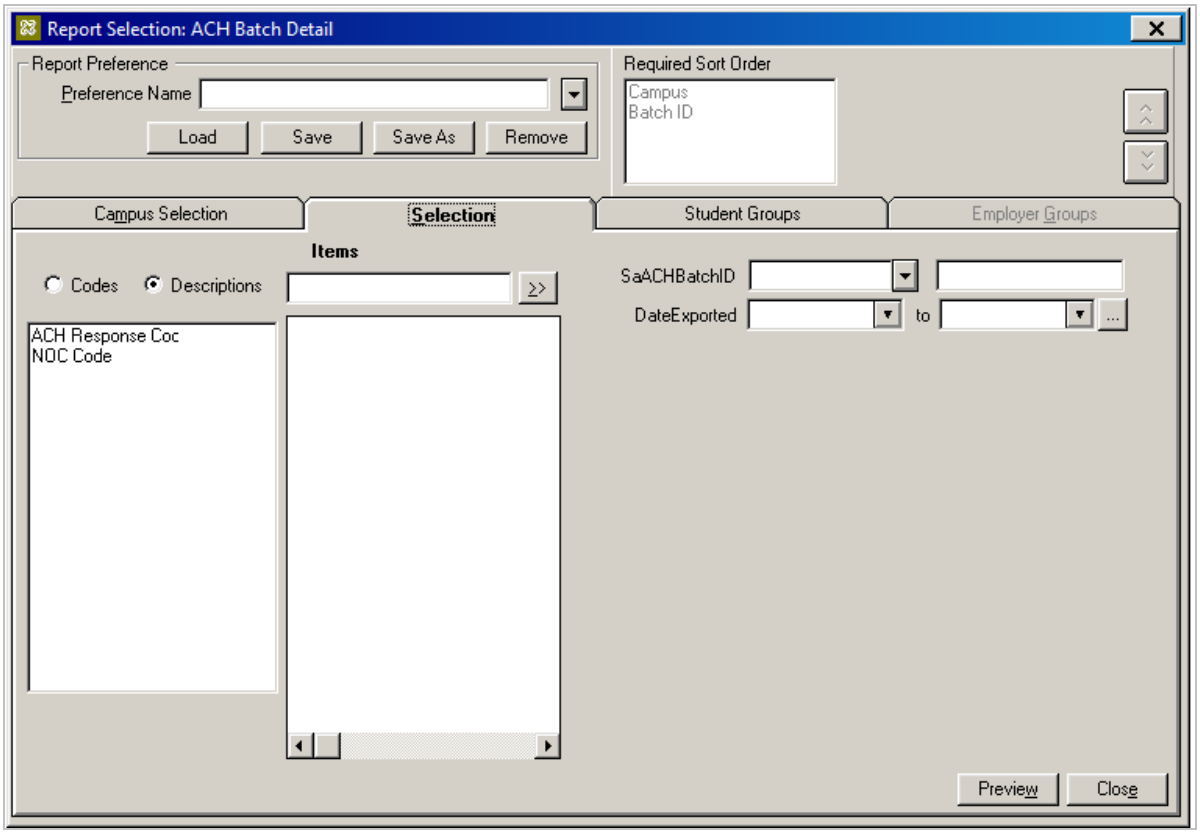
ACH Batch Detail

This report shows Automated Clearing House (ACH) batch transaction details for all students matching the search criteria.

To run the report:

1. Navigate to **Reports > Student Accounts > ACH Batch Detail**. The Report Selection: ACH Batch Detail form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   See ACH Response Codes and Notification of Change (NOC) for more details.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Fund Source
   - Export Date
   - Scheduled Amount
   - Export File Name

- ACH Transaction Number
- User ID
- Batch ID Number
- # of Students per Batch
- # of Records per Batch

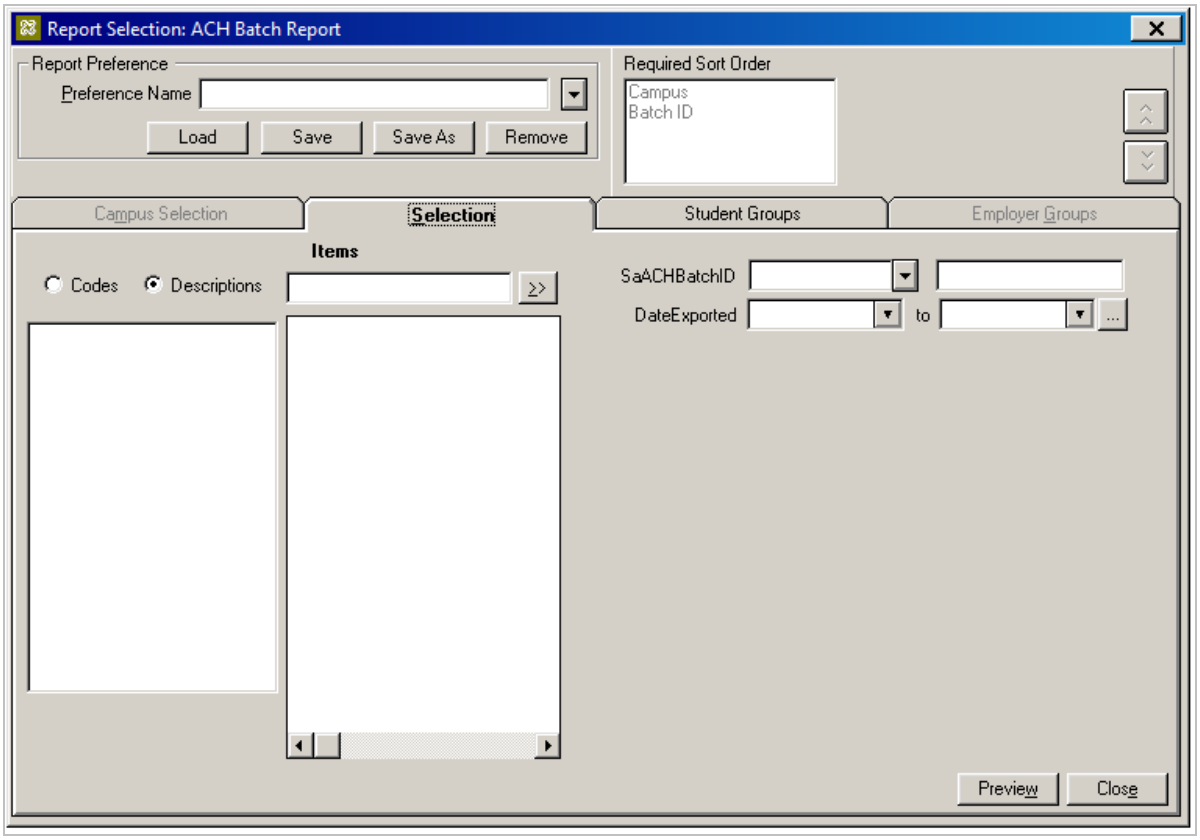
The ACH reference number is included in the report.

ACH Batch Report

This report shows Automated Clearing House (ACH) batch transaction details for all students matching the search criteria.

To run the report:

1. Navigate to **Reports > Student Accounts > ACH Batch Report**. The Report Selection: ACH Batch Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Fund Source
   - Export Date
   - Scheduled Amount
   - Export File Name
   - ACH Transaction Number

- User ID
- Batch ID Number
- # of Students per Batch
- # of Records per Batch

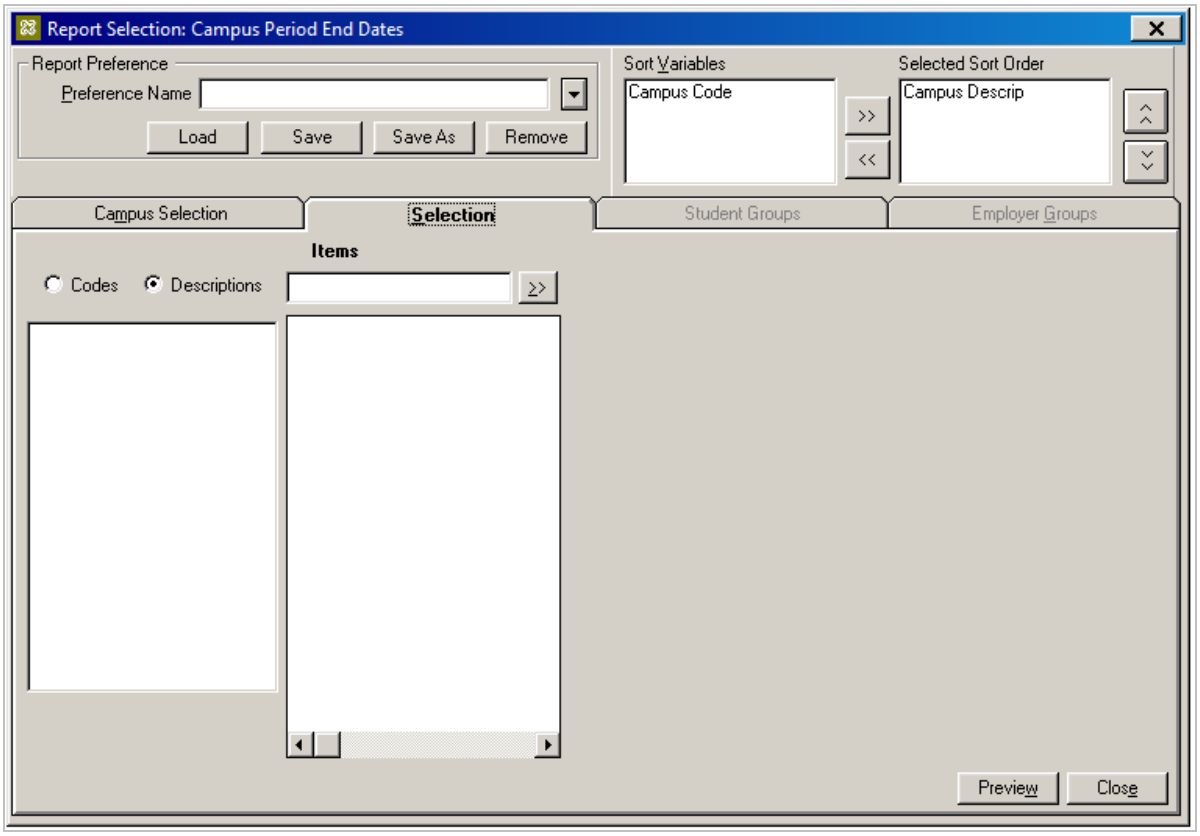
The ACH reference number is included in the report.

Campus Period End Dates

This report lists the end dates for accounting periods at a specific campus.

To run the report:

1. Navigate to **Reports > Student Accounts > Campus Period End Dates**. The Report Selection: Campus Period End Dates form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Campus Code
   - Campus Description
   - Revenue Run
   - General Ledger (GL) Released

- Minimum Transaction Date

Campus Period End Dates

rpt_saPeriodDates.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute

Sorted by: Campus Descrip

12/28/2012
3:17:22PM

Campus Code	Campus Description	Revenue Run	GL Released	Minimum Trans Date
CMI	Campus Management Institute	12/31/2008	12/31/2001	1/1/2002

1 record(s) selected

Campus Management

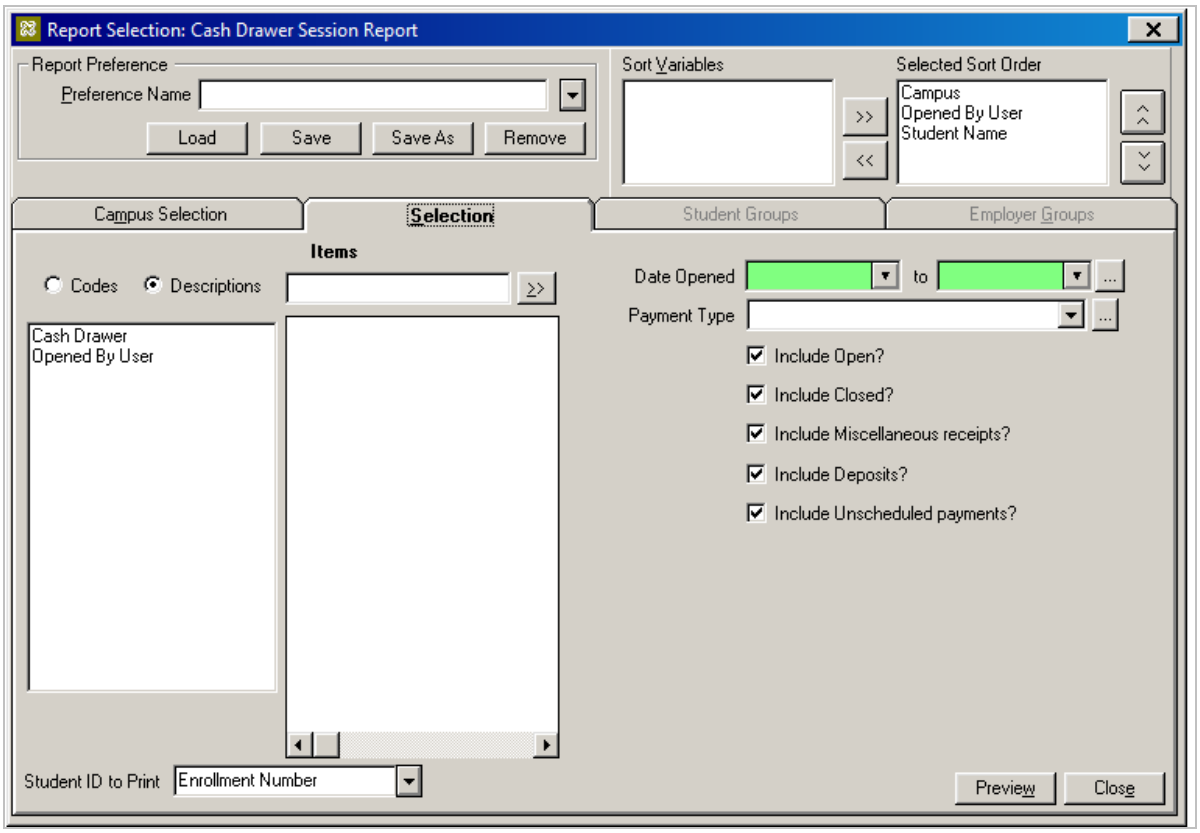
Page 1 of 1

Cash Drawer Session Report

This report provides details about cash drawer sessions for multiple payment types (e.g., cash, credit card, ACH, EFT, web payment).

To run the report:

1. Navigate to **Reports > Student Accounts > Cash Drawer Session Report**. The Report Selection: Cash Drawer Session Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



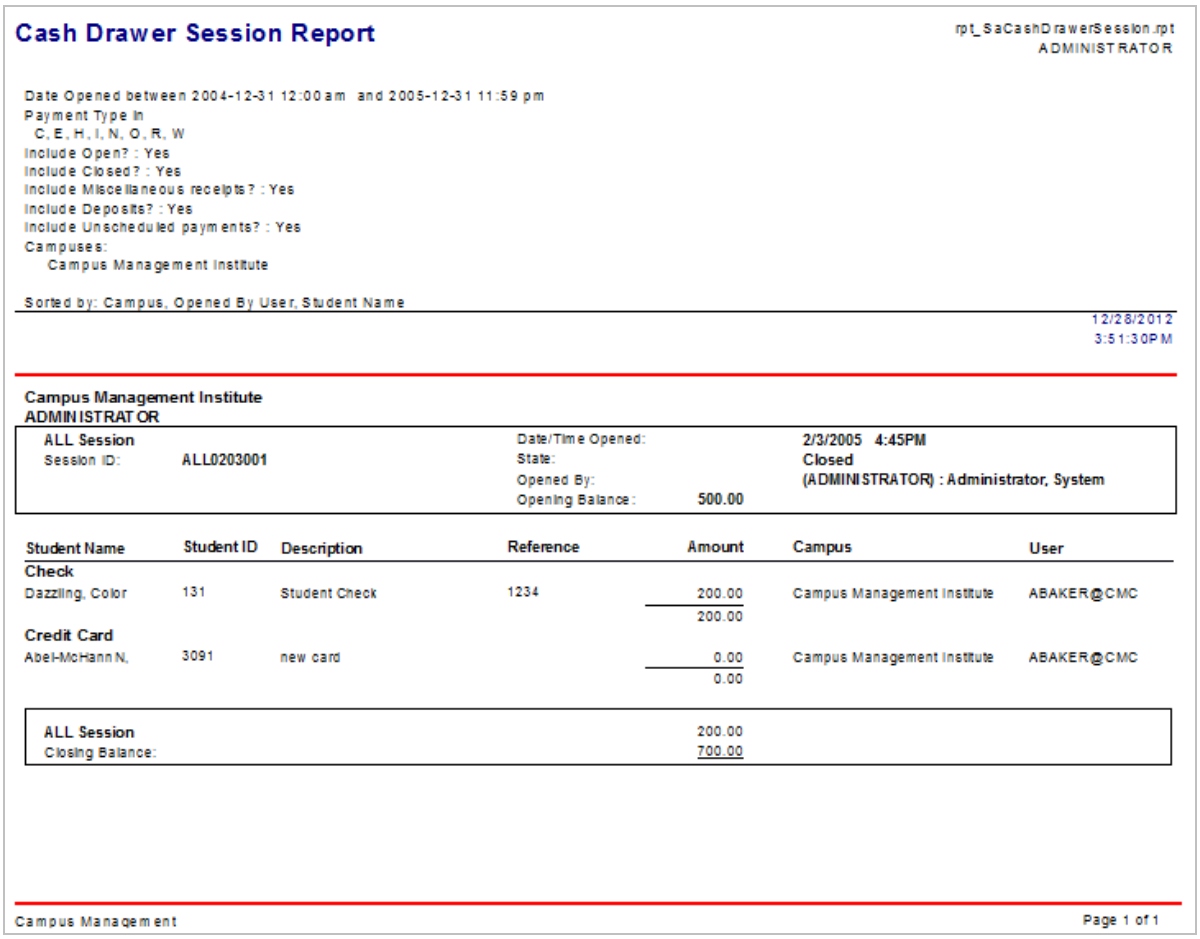
4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Date Opened
   - Cash Drawer Description
   - Session ID
   - Session Description
   - Opening and Closing Balance for Session
   - Session Status
   - Cashier

   Transactions grouped and sub-totaled by type including:

- Student Name
- Student ID
- Payment Type
- Reference
- Transaction Description
- Amount
- User ID for Transaction
- Campus for Transaction
- Individual Bank Account Sub-total and Total for Cash Drawer Session.



Cash Drawer Session Report

rpt_SaCashDrawerSession.rpt
ADMINISTRATOR

Date Opened between 2004-12-31 12:00 am and 2005-12-31 11:59 pm
Payment Type In
C, E, H, I, N, O, R, W
Include Open? : Yes
Include Closed? : Yes
Include Miscellaneous receipts? : Yes
Include Deposits? : Yes
Include Unscheduled payments? : Yes
Campuses:
Campus Management Institute

Sorted by: Campus, Opened By User, Student Name

12/28/2012
3:51:30PM

Campus Management Institute
ADMINISTRATOR

ALL Session
Session ID: **ALL0203001**

Date/Time Opened: **2/3/2005 4:45PM**
State: **Closed**
Opened By: **(ADMINISTRATOR) : Administrator, System**
Opening Balance: **500.00**

Student Name	Student ID	Description	Reference	Amount	Campus	User
Check						
Dazzling, Color	131	Student Check	1234	200.00	Campus Management Institute	ABAKER@CMC
				200.00		
Credit Card						
Abel-McHann N,	3091	new card		0.00	Campus Management Institute	ABAKER@CMC
				0.00		

ALL Session
Closing Balance: 200.00 700.00

Campus Management

Page 1 of 1

Cash Receipts Detail

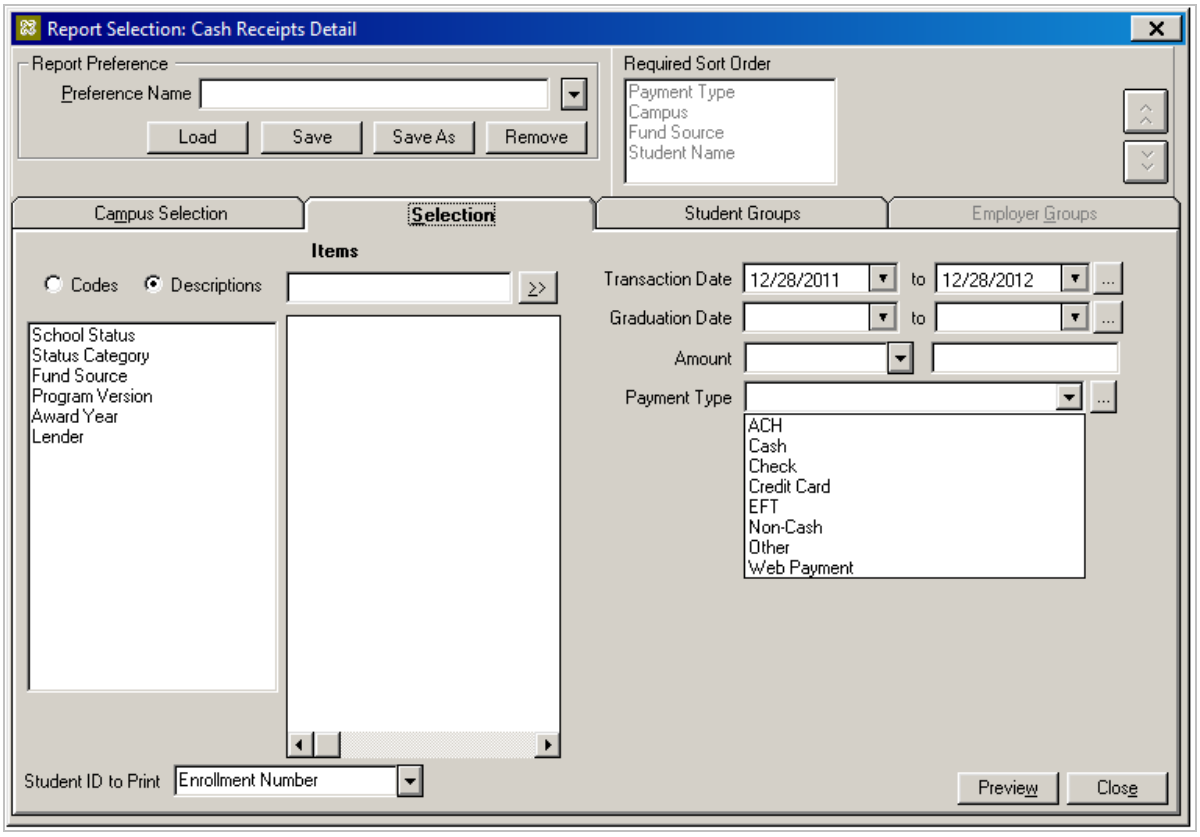
This report lists details of cash receipts. The report includes students that have not been enrolled. Bank Account Descriptions and Account# fields are not displayed on the report.

To run the report:

1. Navigate to **Reports > Student Accounts > Cash Receipts Detail**. The Report Selection: Cash Receipts Detail form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Notes:

   - You can specify only transactions that are greater than or less than an specific amount.
   - If you specify only transactions with amounts less than zero (0), the resulting report lists only refunds made or stipends paid.
   - If you specify only transactions with amounts greater than zero (0), the resulting report lists only cash receipts received.



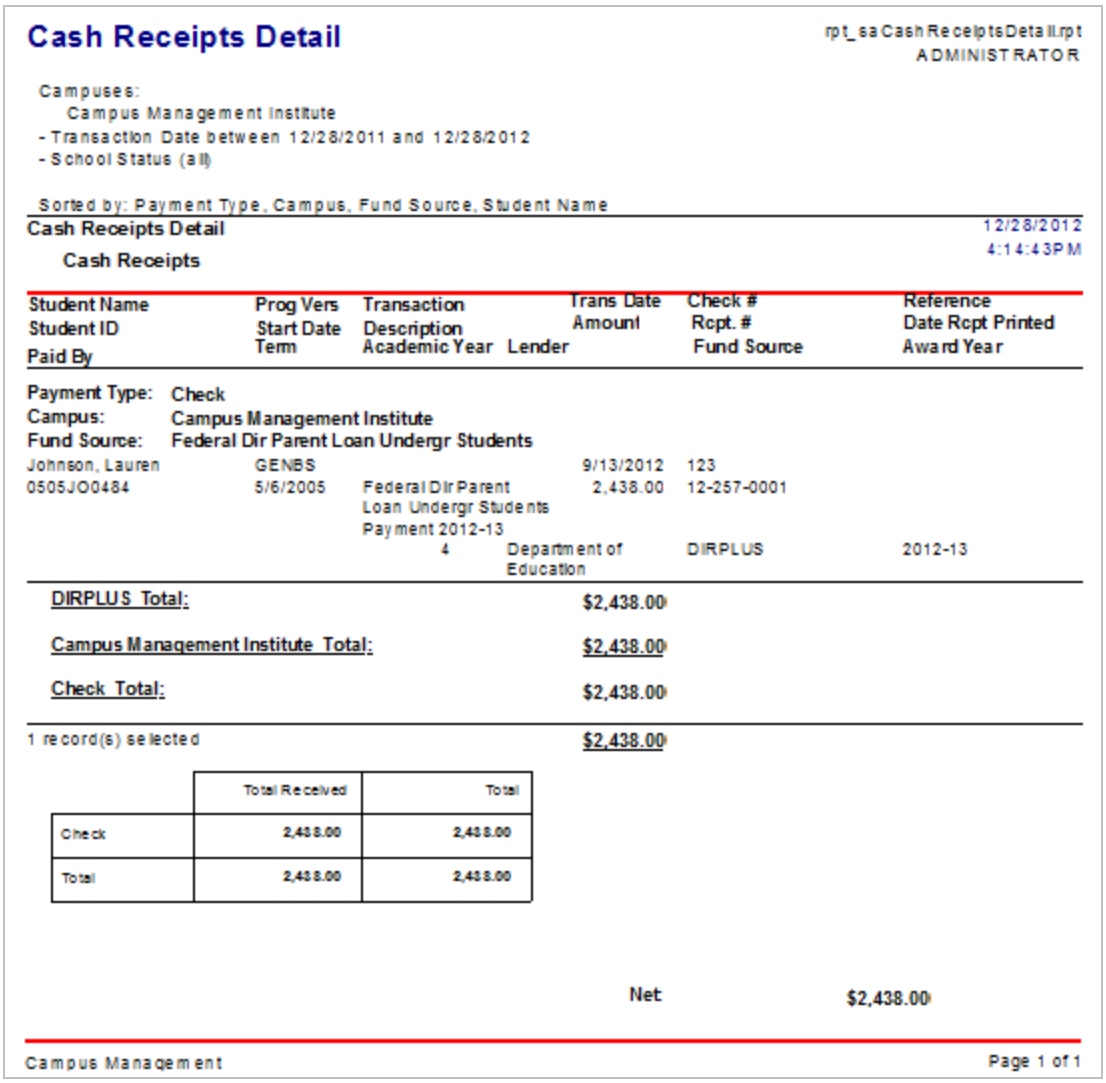
4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

The report displays the following details:

- Student Name
- Student ID
- Program Version
- Start Date
- Transaction Description
- Transaction Amount
- Transaction Date
- Check Number
- Receipt Number
- Date Receipt Printed
- Fund Source Code
- Transaction Reference
- Award Year
- Paid by



Cash Receipts Detail

rpt_saCashReceiptsDetail.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- Transaction Date between 12/28/2011 and 12/28/2012
- School Status (all)

Sorted by: Payment Type, Campus, Fund Source, Student Name

Cash Receipts Detail — 12/28/2012 4:14:43PM

Cash Receipts

Student Name / Student ID / Paid By	Prog Vers / Start Date / Term	Transaction Description / Academic Year	Lender	Trans Date / Amount	Check # / Rcpt. # / Fund Source	Reference / Date Rcpt Printed / Award Year
Payment Type: Check						
Campus: Campus Management Institute						
Fund Source: Federal Dir Parent Loan Undergr Students						
Johnson, Lauren	GENBS			9/13/2012	123	
0505JO0484	5/6/2005	Federal Dir Parent Loan Undergr Students		2,438.00	12-257-0001	
		Payment 2012-13 4	Department of Education		DIRPLUS	2012-13
DIRPLUS Total:				$2,438.00		
Campus Management Institute Total:				$2,438.00		
Check Total:				$2,438.00		
1 record(s) selected				$2,438.00		

	Total Received	Total
Check	2,438.00	2,438.00
Total	2,438.00	2,438.00

Net $2,438.00

Campus Management — Page 1 of 1

The following fields have been added to the report output:

- Term code affiliated with each payment
- Academic year number affiliated with each loan

- Lender affiliated with each payment from a loan

The following fields are exported to an Excel spreadsheet:

StudentName, SSN, SyStudentID, stunum, enrollNum, ssBlank, AwardYear, FundSource, TransDate, Amount, CheckNo, ReceiptNo, Ref, SaTransDesc, PaymentType, CampusDesc, PrintID, Type, TranNum, CCType, CardHolderName, Number Expire, CCAuthNum, CCDeclineCode, StartDate, ExpStartDate, ProgVersionCode, FirstName, LastName, Received, Refunded, Stipends, NotOnFile, PayType, CreditType, TransType, SaStipendID, SaTransID, FundSourceDescrip, sycampusid, LastFourNumber, FaRefundID, Lender, TermCode, AcademicYear, DateReceiptPrinted, Bank Acct Descrip and Account #.

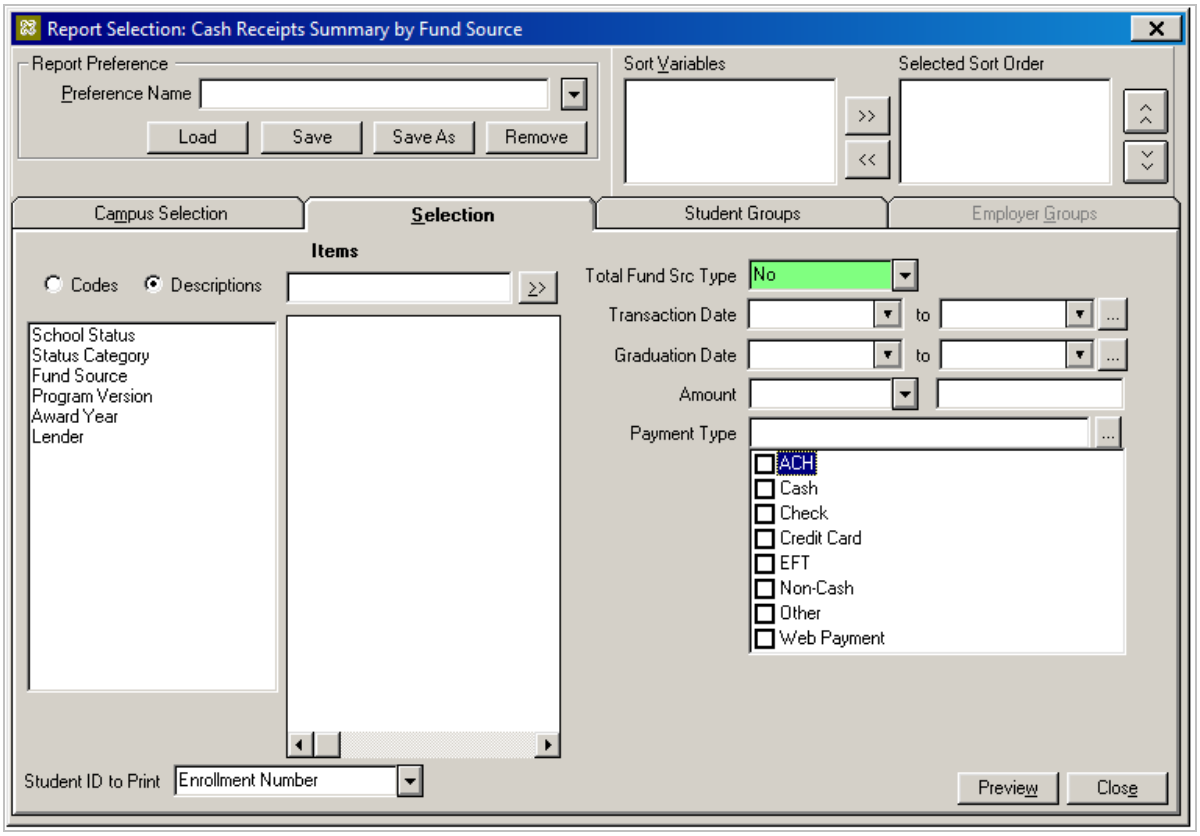
Cash Receipts Summary by Fund Source

This report lists cash receipts by fund source with percentages for the 90/10 calculations.

To run the report:

1. Navigate to **Reports > Student Accounts > Cash Receipts Summary by Fund Source**. The Report Selection: Cash Receipts Summary by Fund Source form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Note: The 'Total Fund Src Type' options are **No** (default) and **Yes**. If you select Yes, the report output lists totals for each fund source type.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

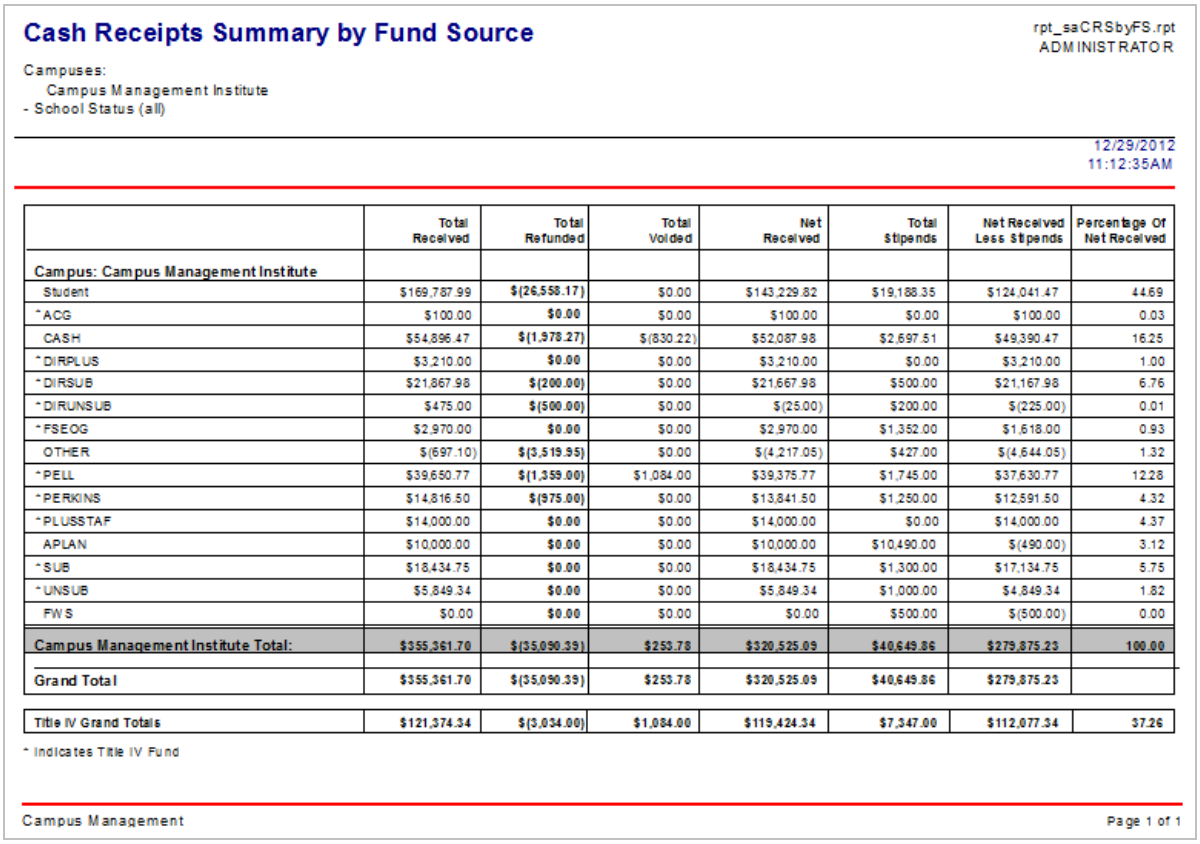
   The report displays the following details:

   - Fund Source Code
   - Total Received
   - Total Refunded
   - Total Voided

- Net Received
- Total Stipends
- Net Received Less Stipends
- Percentage of Net Received.

The Percentage of Net Received adds up to 100% which relates to the total of the Net Received column.

The fund source totals are grouped by campus. A Grand Total selection for all campuses selected is included at the end of the report.



Cash Receipts Summary by Fund Source

rpt_saCRSbyFS.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- School Status (all)

12/29/2012
11:12:35AM

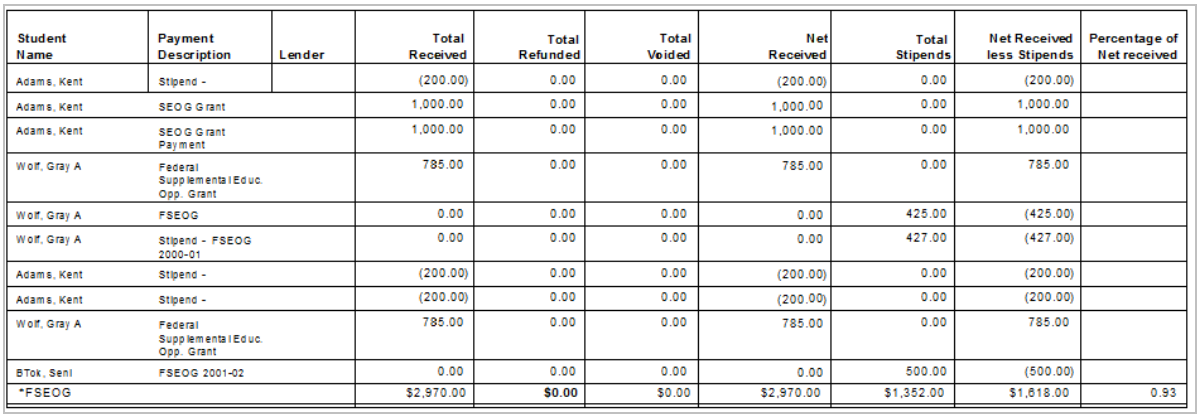
	Total Received	Total Refunded	Total Voided	Net Received	Total Stipends	Net Received Less Stipends	Percentage Of Net Received
Campus: Campus Management Institute							
Student	$169,787.99	$(26,558.17)	$0.00	$143,229.82	$19,188.35	$124,041.47	44.69
*ACG	$100.00	$0.00	$0.00	$100.00	$0.00	$100.00	0.03
CASH	$54,896.47	$(1,978.27)	$(830.22)	$52,087.98	$2,697.51	$49,390.47	16.25
*DIRPLUS	$3,210.00	$0.00	$0.00	$3,210.00	$0.00	$3,210.00	1.00
*DIRSUB	$21,867.98	$(200.00)	$0.00	$21,667.98	$500.00	$21,167.98	6.76
*DIRUNSUB	$475.00	$(500.00)	$0.00	$(25.00)	$200.00	$(225.00)	0.01
*FSEOG	$2,970.00	$0.00	$0.00	$2,970.00	$1,352.00	$1,618.00	0.93
OTHER	$(697.10)	$(3,519.95)	$0.00	$(4,217.05)	$427.00	$(4,644.05)	1.32
*PELL	$39,650.77	$(1,359.00)	$1,084.00	$39,375.77	$1,745.00	$37,630.77	12.28
*PERKINS	$14,816.50	$(975.00)	$0.00	$13,841.50	$1,250.00	$12,591.50	4.32
*PLUSSTAF	$14,000.00	$0.00	$0.00	$14,000.00	$0.00	$14,000.00	4.37
APLAN	$10,000.00	$0.00	$0.00	$10,000.00	$10,490.00	$(490.00)	3.12
*SUB	$18,434.75	$0.00	$0.00	$18,434.75	$1,300.00	$17,134.75	5.75
*UNSUB	$5,849.34	$0.00	$0.00	$5,849.34	$1,000.00	$4,849.34	1.82
FWS	$0.00	$0.00	$0.00	$0.00	$500.00	$(500.00)	0.00
Campus Management Institute Total:	**$355,361.70**	**$(35,090.39)**	**$253.78**	**$320,525.09**	**$40,649.86**	**$279,875.23**	**100.00**
Grand Total	**$355,361.70**	**$(35,090.39)**	**$253.78**	**$320,525.09**	**$40,649.86**	**$279,875.23**	
Title IV Grand Totals	**$121,374.34**	**$(3,034.00)**	**$1,084.00**	**$119,424.34**	**$7,347.00**	**$112,077.34**	**37.26**

* Indicates Title IV Fund

Campus Management
Page 1 of 1

You can double-click the student and fund source fields to drill down into the details as shown below.

Note that the details table includes an additional column for Lender information.



Student Name	Payment Description	Lender	Total Received	Total Refunded	Total Voided	Net Received	Total Stipends	Net Received less Stipends	Percentage of Net received
Adams, Kent	Stipend -		(200.00)	0.00	0.00	(200.00)	0.00	(200.00)	
Adams, Kent	SEOG Grant		1,000.00	0.00	0.00	1,000.00	0.00	1,000.00	
Adams, Kent	SEOG Grant Payment		1,000.00	0.00	0.00	1,000.00	0.00	1,000.00	
Wolf, Gray A	Federal Supplemental Educ. Opp. Grant		785.00	0.00	0.00	785.00	0.00	785.00	
Wolf, Gray A	FSEOG		0.00	0.00	0.00	0.00	425.00	(425.00)	
Wolf, Gray A	Stipend - FSEOG 2000-01		0.00	0.00	0.00	0.00	427.00	(427.00)	
Adams, Kent	Stipend -		(200.00)	0.00	0.00	(200.00)	0.00	(200.00)	
Adams, Kent	Stipend -		(200.00)	0.00	0.00	(200.00)	0.00	(200.00)	
Wolf, Gray A	Federal Supplemental Educ. Opp. Grant		785.00	0.00	0.00	785.00	0.00	785.00	
BTok, Seni	FSEOG 2001-02		0.00	0.00	0.00	0.00	500.00	(500.00)	
*FSEOG			$2,970.00	$0.00	$0.00	$2,970.00	$1,352.00	$1,618.00	0.93

Credit Card Transactions

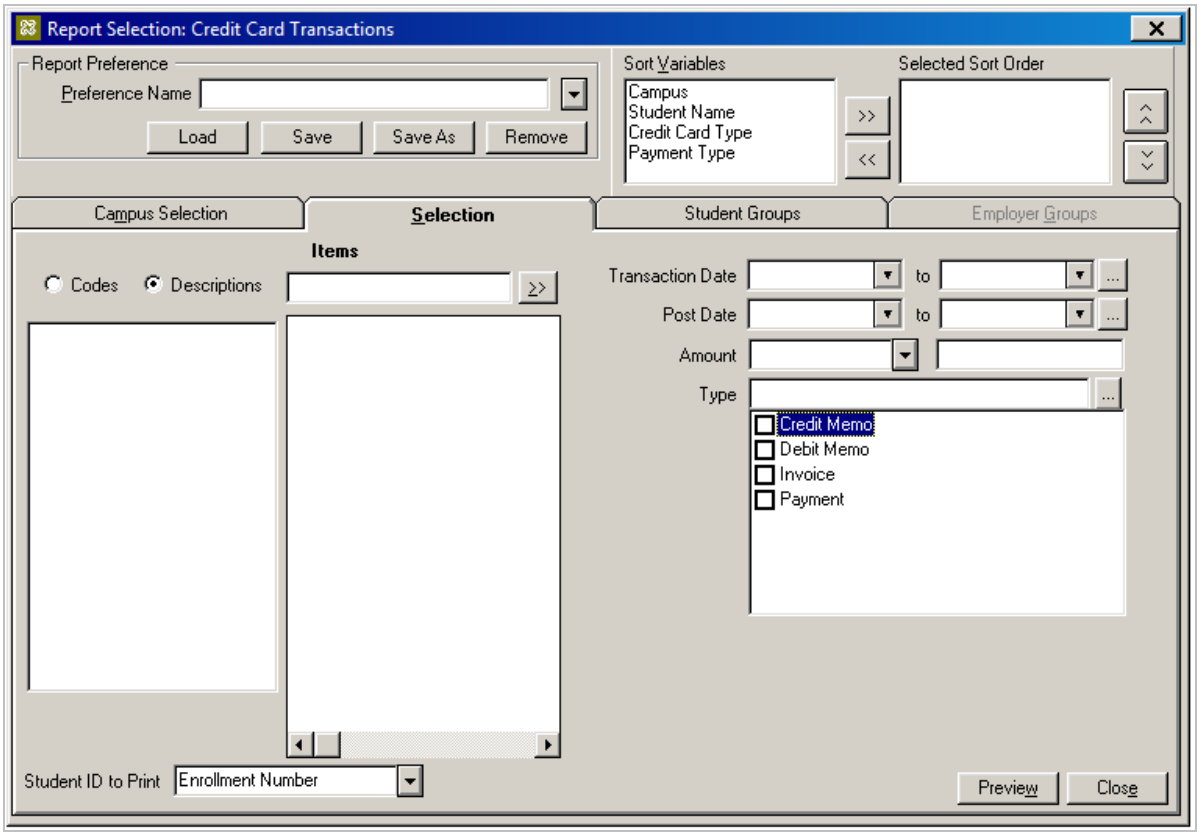
This report lists credit card transactions within a date range entered by the user.

To run the report:

1. Navigate to **Reports > Student Accounts > Credit Card Transactions**. The Report Selection: Credit Card Transactions form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Notes:

   - You can specify only transactions that are greater than or less than an entered number.
   - If you specify only transactions where the amount is less than zero (0), the resulting report lists only Credit Card Refunds made.
   - If you specify only transactions where the amount is greater than zero (0), the resulting report lists only Credit Card Payments Received.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

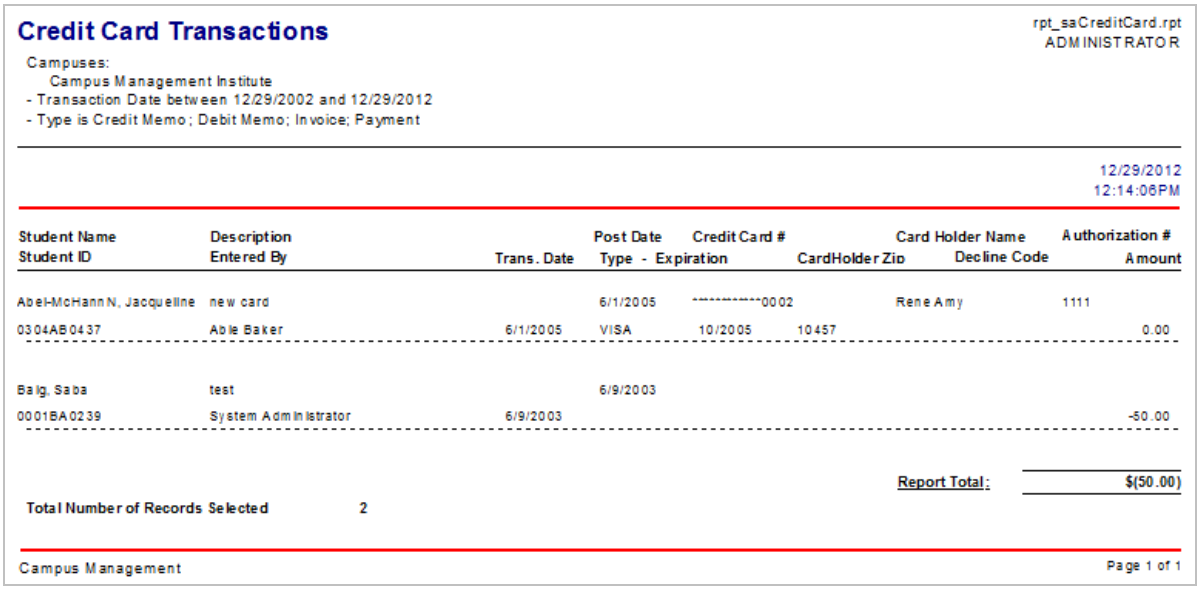
   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

The report displays the following details:

- Student Name
- Student ID
- Transaction Description
- Transaction Date
- Posting Date
- Credit Card Number
- Credit Card Type (Visa, AMEX, etc.)
- Credit Card Expiration Date
- Card Holder Name
- Card Holder ZIP Code
- Authorization Code
- Decline Code
- Transaction Date
- Transaction Amount

A campus total and grand total are provided.



Credit Card Transactions

rpt_saCreditCard.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- Transaction Date between 12/29/2002 and 12/29/2012
- Type is Credit Memo; Debit Memo; Invoice; Payment

12/29/2012
12:14:06PM

Student Name / Student ID	Description / Entered By	Trans. Date	Post Date / Type	Credit Card # / Expiration	CardHolder Zip	Card Holder Name / Decline Code	Authorization # / Amount
Abel-McHann N, Jacqueline	new card		6/1/2005	**********0002		Rene Amy	1111
0304AB0437	Able Baker	6/1/2005	VISA	10/2005	10457		0.00
Baig, Saba	test		6/9/2003				
0001BA0239	System Administrator	6/9/2003					-50.00
						Report Total:	$(50.00)

Total Number of Records Selected 2

Campus Management

Page 1 of 1

Detail Subsidiary Transaction Register

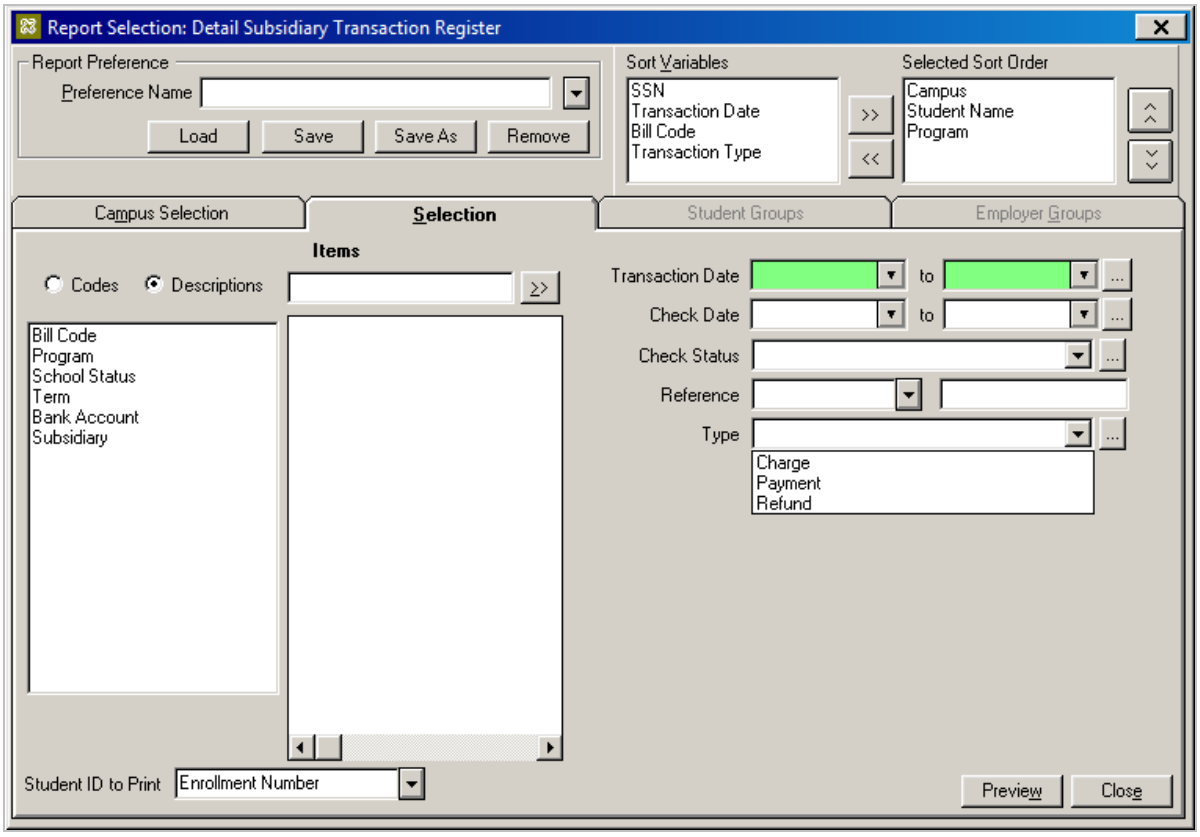
This report provides detailed information about transactions in the subsidiary register.

To run the report:

1. Navigate to **Reports > Student Accounts > Detail Subsidiary Transaction Register**. The Report Selection: Detail Subsidiary Transaction Register form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   You must specify the transaction date range for the report. Additional selection options include the Check Status (Cleared, Sent, Unclaimed, Void) and Check Date options to collect information about subsidiary refund checks and options to search data by Reference ID or Type (Charge, Payment, or Refund).

   Note: The Detail Transaction Register report provides additional Sort and Selection options, such as 'Tuition Discount Policy', the Type options 'Credit Memo', 'Debit Memo', and 'Invoice', and the option to 'Include applied payments'.



4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

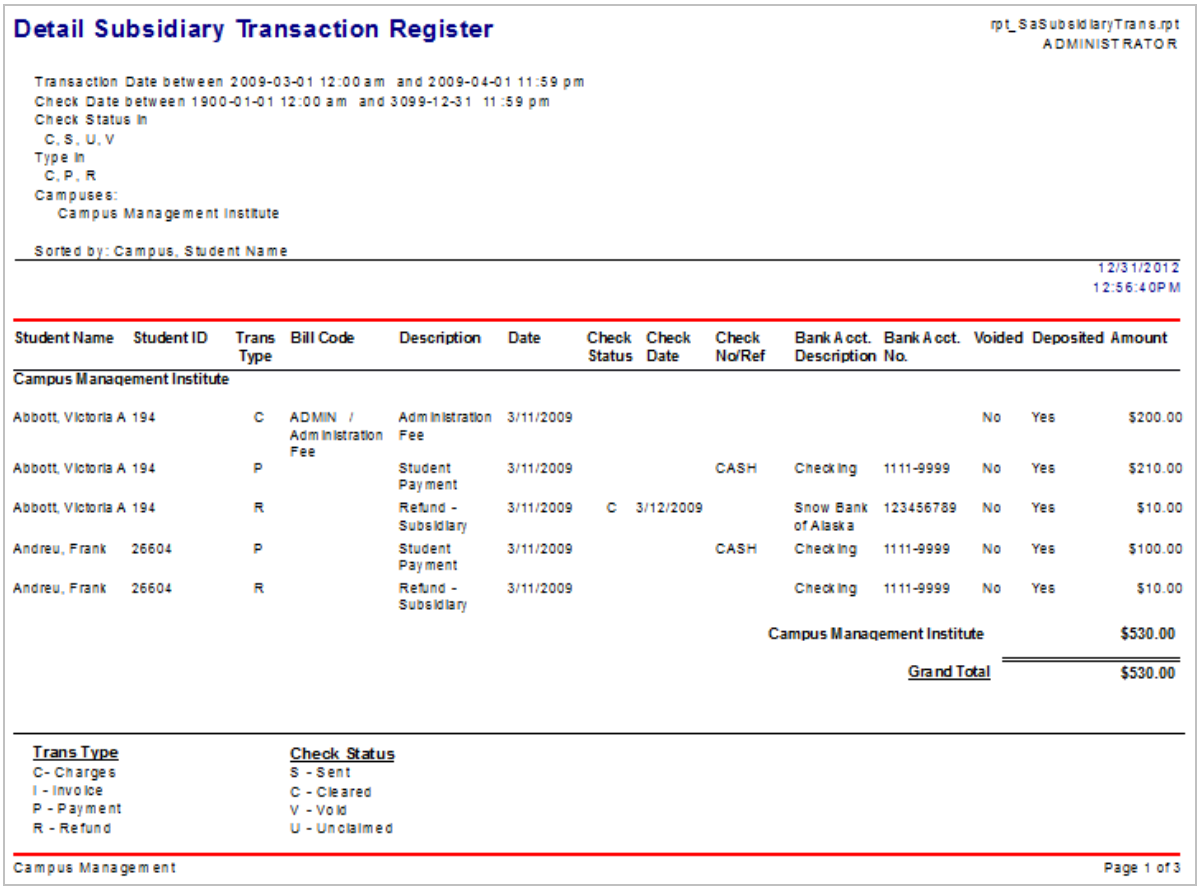
   The report displays the following details:

   - Student Name
   - Student ID

- Transaction Type
- Bill Code
- Bill Code Description
- Transaction Date
- Check Status
- Check Date
- Check Number
- Bank Account Description
- Bank Account Number
- Voided/Deposited Amount

The report displays transaction details for each student and a summary of all transactions grouped by Bill Code and selected sort criteria.

The following are examples of a details page and a summary page.



Detail Subsidiary Transaction Register

rpt_SaSubsidiaryTrans.rpt
ADMINISTRATOR

Transaction Date between 2009-03-01 12:00 am and 2009-04-01 11:59 pm
Check Date between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Check Status In
C, S, U, V
Type In
C, P, R
Campuses:
Campus Management Institute

Sorted by: Campus, Student Name

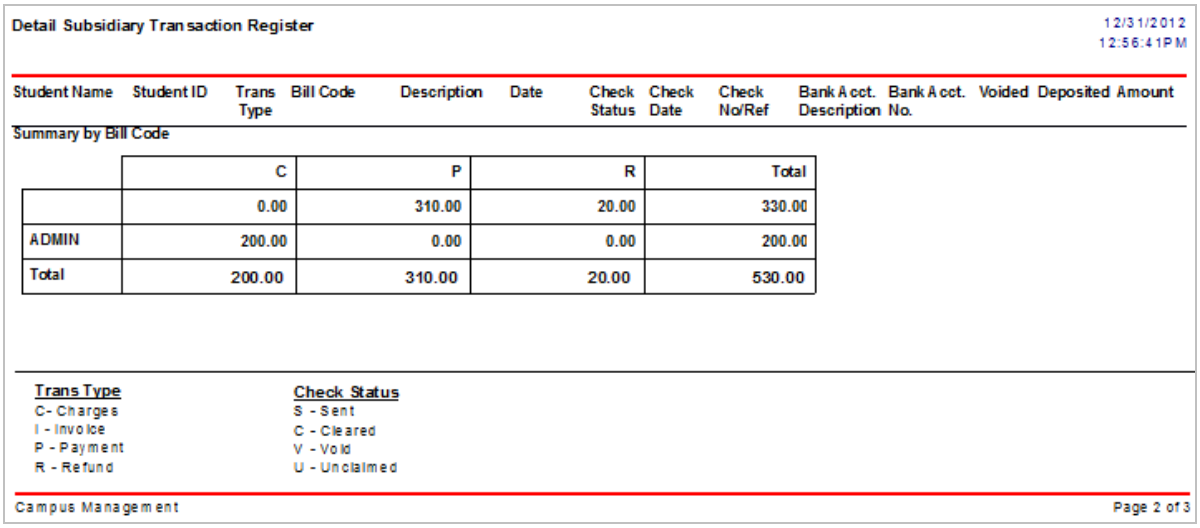
12/31/2012
12:56:40 PM

Student Name	Student ID	Trans Type	Bill Code	Description	Date	Check Status	Check Date	Check No/Ref	Bank Acct. Description	Bank Acct. No.	Voided	Deposited	Amount
Campus Management Institute													
Abbott, Victoria A	194	C	ADMIN / Administration Fee	Administration Fee	3/11/2009						No	Yes	$200.00
Abbott, Victoria A	194	P		Student Payment	3/11/2009			CASH	Checking	1111-9999	No	Yes	$210.00
Abbott, Victoria A	194	R		Refund - Subsidiary	3/11/2009	C	3/12/2009		Snow Bank of Alaska	123456789	No	Yes	$10.00
Andreu, Frank	26604	P		Student Payment	3/11/2009			CASH	Checking	1111-9999	No	Yes	$100.00
Andreu, Frank	26604	R		Refund - Subsidiary	3/11/2009				Checking	1111-9999	No	Yes	$10.00
										Campus Management Institute			**$530.00**
										Grand Total			**$530.00**

Trans Type
C - Charges
I - Invoice
P - Payment
R - Refund

Check Status
S - Sent
C - Cleared
V - Void
U - Unclaimed

Campus Management
Page 1 of 3



Detail Subsidiary Transaction Register

12/31/2012
12:56:41PM

Student Name	Student ID	Trans Type	Bill Code	Description	Date	Check Status	Check Date	Check No/Ref	Bank Acct. Description	Bank Acct. No.	Voided	Deposited	Amount

Summary by Bill Code

	C	P	R	Total
	0.00	310.00	20.00	330.00
ADMIN	200.00	0.00	0.00	200.00
Total	200.00	310.00	20.00	530.00

Trans Type
C - Charges
I - Invoice
P - Payment
R - Refund

Check Status
S - Sent
C - Cleared
V - Void
U - Unclaimed

Campus Management

Page 2 of 3

Detail Transaction Register

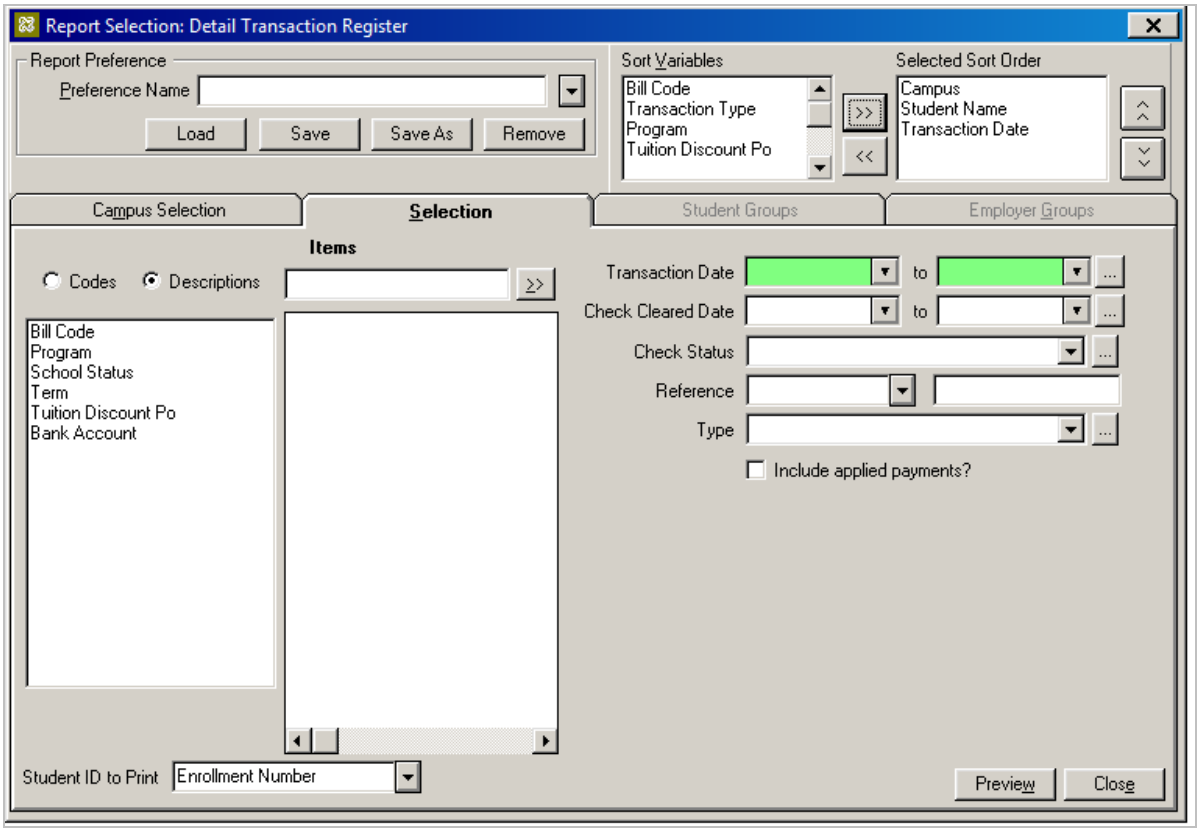
This report provides detailed information about the transaction register.

To run the report:

1. Navigate to **Reports > Student Accounts > Detail Transaction Register**. The Report Selection: Detail Transaction Register form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   You must specify the transaction date range for the report. Additional selection options include the 'Check Cleared Date', 'Check Status' (Cleared, Sent, Unclaimed, Void), 'Reference ID', Type (Credit Memo, Debit Memo, Invoice, Payment).

   Note: Compared to the Detail Subsidiary Transaction Register report, this report provides additional Sort and Selection options, such as 'Tuition Discount Policy', the Type options 'Credit Memo', 'Debit Memo', and 'Invoice', and the option to 'Include applied payments'.



4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

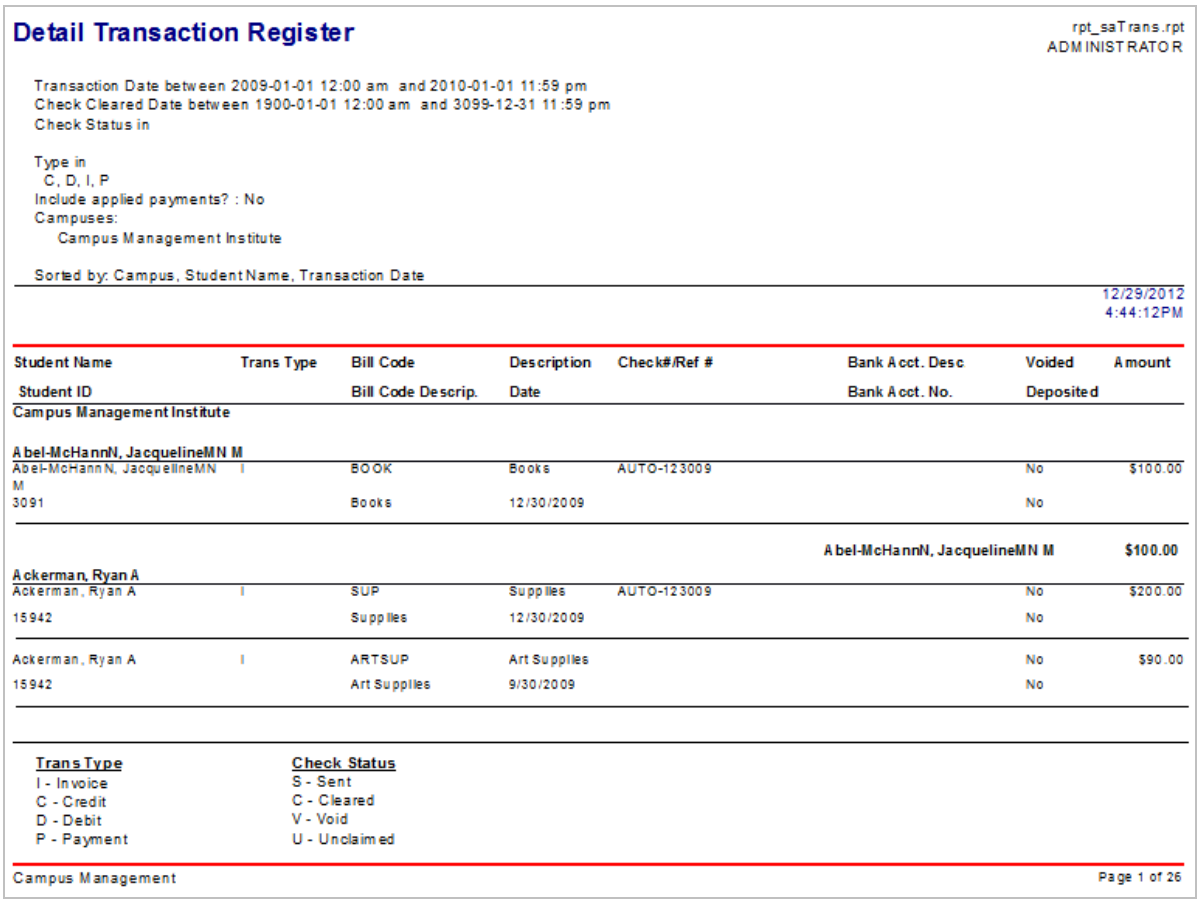
   The report displays the following details:

   - Student Name
   - Student ID

- Transaction Type
- Bill Code
- Bill Code Description
- Transaction Date
- Check Status
- Check Date
- Check Number
- Bank Account Description
- Bank Account Number
- Voided/Deposited Amount

The report displays transaction details for each student and a summary of all transactions grouped by Bill Code and the selected sort criteria.

The following are examples of a details page and a summary page.



Detail Transaction Register

rpt_saTrans.rpt
ADMINISTRATOR

Transaction Date between 2009-01-01 12:00 am and 2010-01-01 11:59 pm
Check Cleared Date between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Check Status in

Type in
C, D, I, P
Include applied payments? : No
Campuses:
Campus Management Institute

Sorted by: Campus, Student Name, Transaction Date

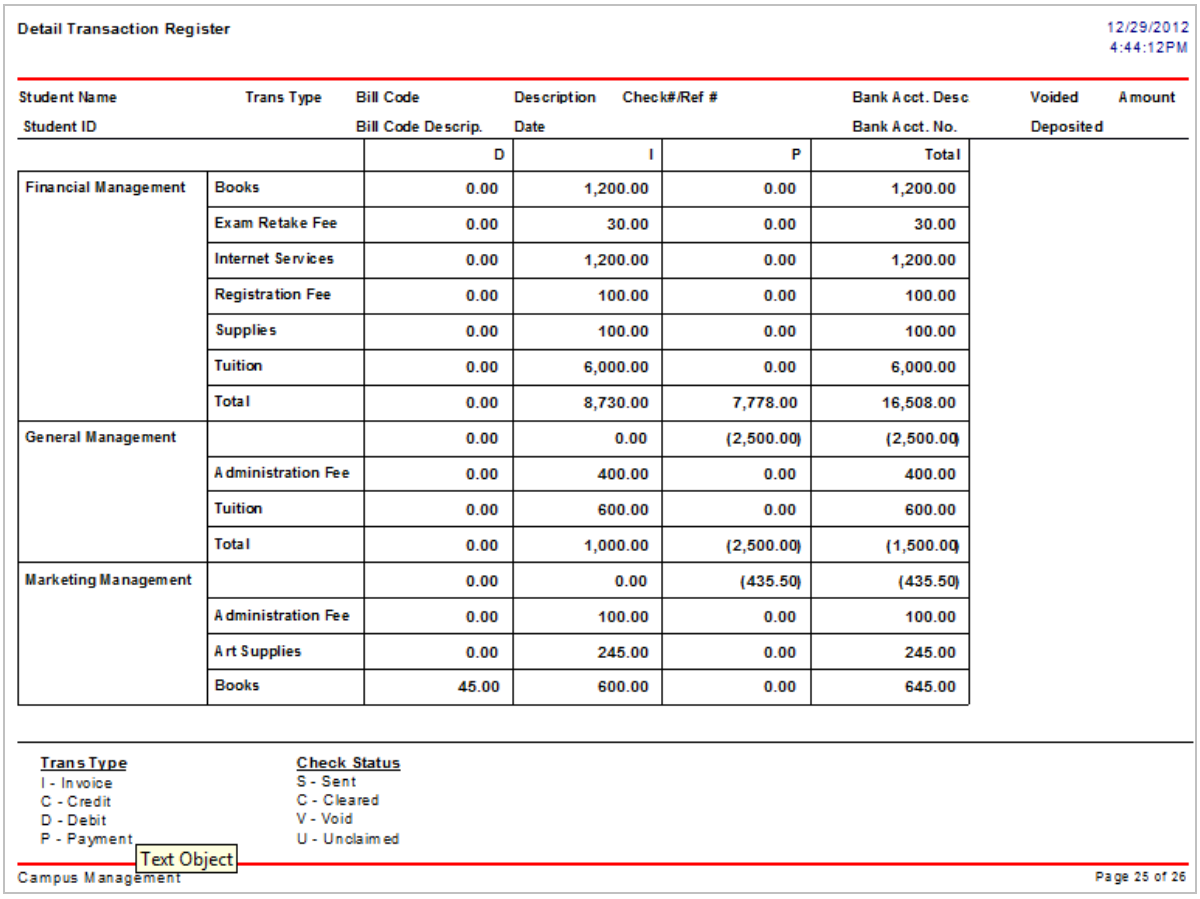
12/29/2012
4:44:12PM

Student Name / Student ID	Trans Type	Bill Code / Bill Code Descrip.	Description / Date	Check#/Ref #	Bank Acct. Desc / Bank Acct. No.	Voided / Deposited	Amount
Campus Management Institute							
Abel-McHannN, JacquelineMN M							
Abel-McHannN, JacquelineMN M	I	BOOK	Books	AUTO-123009		No	$100.00
3091		Books	12/30/2009			No	
					Abel-McHannN, JacquelineMN M		**$100.00**
Ackerman, Ryan A							
Ackerman, Ryan A	I	SUP	Supplies	AUTO-123009		No	$200.00
15942		Supplies	12/30/2009			No	
Ackerman, Ryan A	I	ARTSUP	Art Supplies			No	$90.00
15942		Art Supplies	9/30/2009			No	

Trans Type
I - Invoice
C - Credit
D - Debit
P - Payment

Check Status
S - Sent
C - Cleared
V - Void
U - Unclaimed

Campus Management — Page 1 of 26



Detail Transaction Register

12/29/2012
4:44:12PM

Student Name / Student ID	Trans Type	Bill Code / Bill Code Descrip.	Description / Date	Check#/Ref #	Bank Acct. Desc / Bank Acct. No.	Voided / Deposited	Amount

		D	I	P	Total
Financial Management	Books	0.00	1,200.00	0.00	1,200.00
	Exam Retake Fee	0.00	30.00	0.00	30.00
	Internet Services	0.00	1,200.00	0.00	1,200.00
	Registration Fee	0.00	100.00	0.00	100.00
	Supplies	0.00	100.00	0.00	100.00
	Tuition	0.00	6,000.00	0.00	6,000.00
	Total	0.00	8,730.00	7,778.00	16,508.00
General Management		0.00	0.00	(2,500.00)	(2,500.00)
	Administration Fee	0.00	400.00	0.00	400.00
	Tuition	0.00	600.00	0.00	600.00
	Total	0.00	1,000.00	(2,500.00)	(1,500.00)
Marketing Management		0.00	0.00	(435.50)	(435.50)
	Administration Fee	0.00	100.00	0.00	100.00
	Art Supplies	0.00	245.00	0.00	245.00
	Books	45.00	600.00	0.00	645.00

Trans Type
I - Invoice
C - Credit
D - Debit
P - Payment

Check Status
S - Sent
C - Cleared
V - Void
U - Unclaimed

Text Object

Campus Management

Page 25 of 26

Drop Report

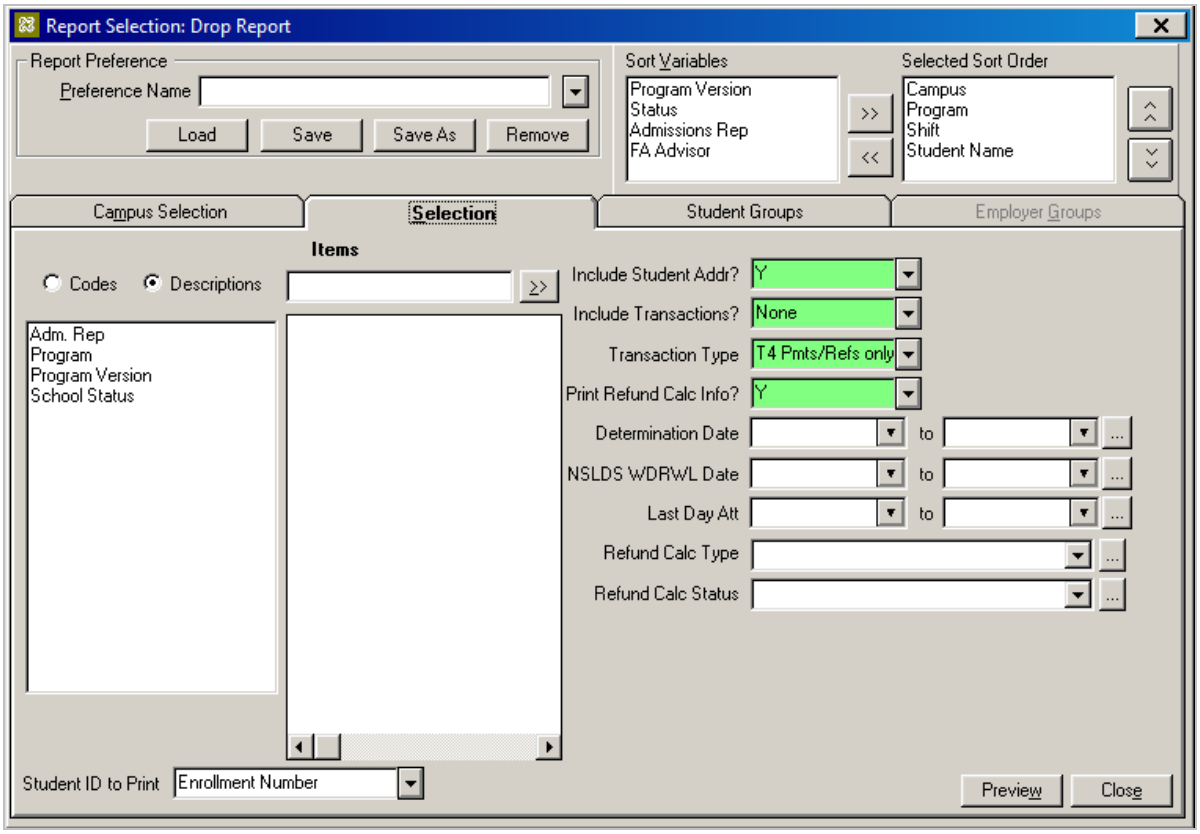
This report lists students that have dropped out of an enrollment.

To run the report:

1. Navigate to **Reports > Student Accounts > Drop Report**. The Report Selection: Drop Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Notes:

   - If you select to include transactions, the sub report 'Ledger Card Transactions' is displayed as a part of the report.
   - If you select to print refund information, the sub report 'Refund Calculation Status' is displayed as a part of the report. Details on the sub report include Refund Calculation Type, Refund Calculation Status, Date Calculated, Description of the Fund Source, Refund Amount, T4Refund Amount, Return Method, and the Date Sent.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

The report displays the following details:

- Student Name
- Student ID
- Student Address
- Phone Number
- Previous Education
- Drop Date
- Last Date Attended (LDA)
- Start Date
- Grad Date
- Program Version
- Shift
- Admissions Rep
- FA Advisor
- AR Balance
- National Student Loan Data System (NSLDS) Withdrawal (WDRWL) Date
- School Status
- Reason Student Dropped

The following are examples of a Drop Report details page and a Refund Calculation Status page.

Drop Report

rpt_SaDropReport.rpt
ADMINISTRATOR

- Include Student Address
- No Transactions Printed
- Title IV Payments/Refunds only

Campuses:
Campus Management Institute
- Last Day Att between 2/19/2009 and 3/1/2009
- School Status (all)

Sorted by: Campus, Program, Shift, Student Name

12/29/2012
7:56:36PM

Student Name **Student ID**
Phone Number **Previous Education**

Drop Date	Start Date	Program Version	Admissions Rep	Status	AR Balance
LDA	Grad Date	Shift	FA Advisor	Reason	
NSLDS WDRWL Date					

Campus Management Institute

Marketing Management
Day

Smith, John A 0609SM0522
(954) 555-3456 High School

Wonderkind Apartments, Apt 1
1234 NW State Road 7,Tamarac,FL 33441

	9/4/2006	Marketing Version Catalog	Baker, Able	Transfer To Other Campus	0.00
2/20/2009	4/14/2008	Day	Mellon, Andrew	Regular Active Status	

Refund Calculation Status

Type: Hypothetical Status: Calculated Calc Date: 8/27/2008 Processing Date:

Descrip	Refund Amount	T4 Refund Amount	Return Method	Date Sent
Student	0.00	0.00		

Total Balance: **0.00**

Number Of Students: 1 **Total AR Balance:** **$0.00**

Campus Management Page 1 of 1

Drop Report 12/30/2012 4:04:21PM

Student Name | Student ID
Phone Number | Previous Education

Drop Date / LDA / NSLDS WDRWL Date	Start Date / Grad Date	Program Version / Shift	Admissions Rep / FA Advisor	Status / Reason	AR Balance
		Credit Associate in Marketing Management	Baker, Able	Cancelled	6100.00
	12/18/2002	Weekend			

Refund Calculation Status

Type:	Status:	Calc Date:	Processing Date:
Descrip	Refund Amount	T4 Refund Amount	Return Method / Date Sent

Total Balance: 6100.00

Program Bachelor Hautes Études en Hôtellerie Pr Evening

Eric, Banford | 1106ER0633
(516) 495-4958 | High School
1 eric Way, Fort Lauderdale, FL 33305

6/21/2011		Program Bachelor Hautes Études en Hôtellerie Professions de L'Accueil	Lewis, Diane	Drop	50.00
	9/30/2013	Evening		Medical	
6/21/2011					

Refund Calculation Status

Type:	Status:	Calc Date:	Processing Date:
Descrip	Refund Amount	T4 Refund Amount	Return Method / Date Sent

Total Balance: 50.00

Number Of Students: 46 Total AR Balance: $53,342.33

Campus Management Page 27 of 27

Earned/Prepaid A/R Report

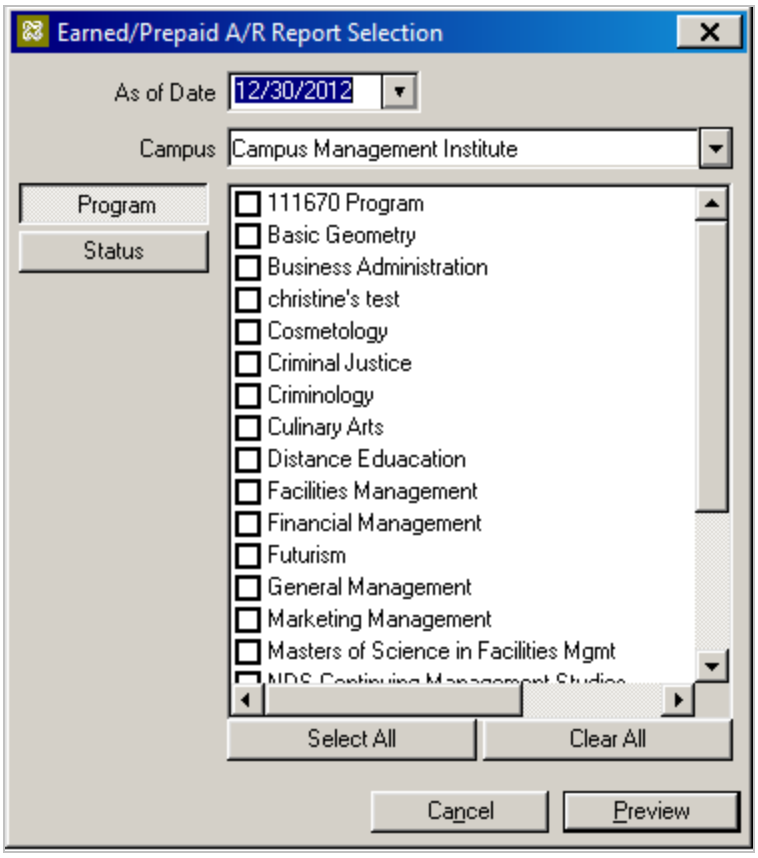
This report compares a student's account balance to the deferred tuition balance. Schools use this report to confirm that they have collected the amount of revenue they have earned from the student.

A school earns revenue on students over a period of time. If a student's account is "up to date", in theory, a school will have collected the amount of money from the student that they have "earned" as revenue. Therefore, the amount that is left to earn for a student (deferred amount) could equal the student's account balance.

For example, if a school has earned $5000.00 on a student, and still has $5000.00 deferred (unearned), the student's account balance would be expected to be equal to or less than $5000.00. If the student's account balance was $8,000.00, the school could recognize revenue of $3000.00 earned but not received. Likewise, if a student's account balance is zero, with $5000.00 deferred, the student has "prepaid" the amount of deferred revenue. This becomes critical when reporting "unearned revenue" on financial statements.

To run the report:

1. Navigate to **Reports > Student Accounts > Earned/Prepaid A/R Report**. The Earned/Prepaid A/R Report Selection form is displayed.
2. Select appropriate options in the **As of Date**, **Campus**, **Program** or **Status** fields.

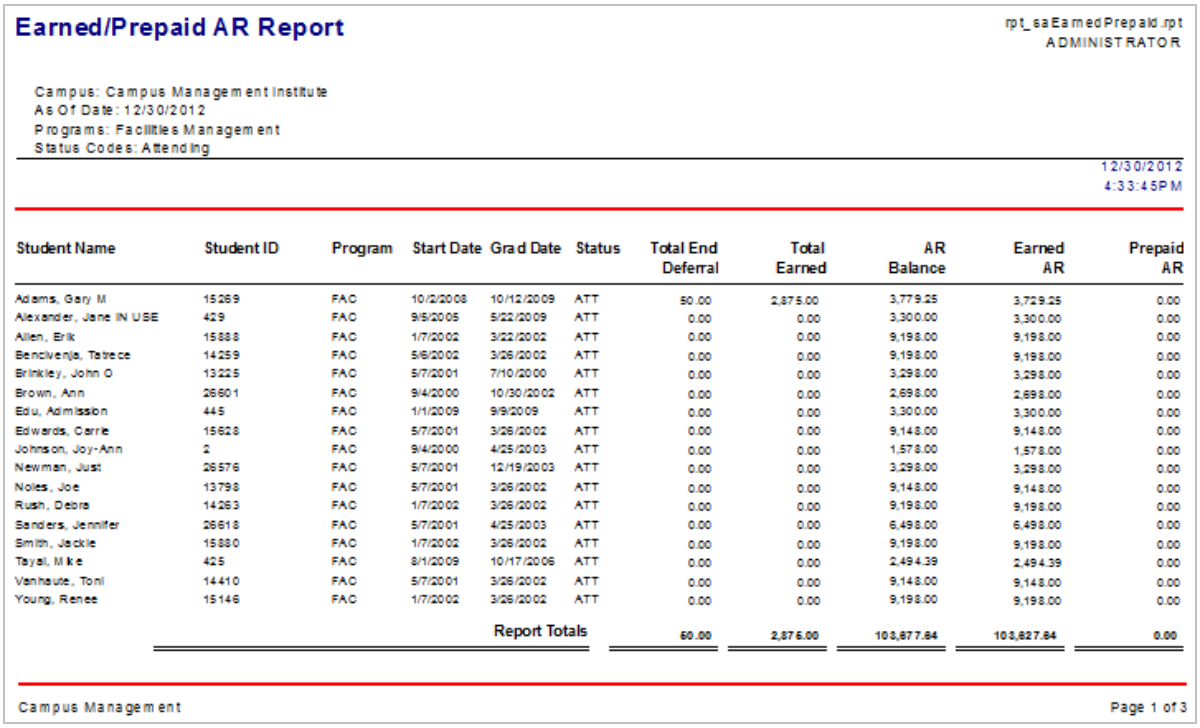


3. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

- Student Name
- Status, Program
- Start Date
- Graduation Date
- Total End Deferred
- Accounts Receivable (AR) Balance
- Earned AR
- Prepaid AR.

The following are examples of the Earned/Prepaid A/R Report details page and the Summary by Status page.



Earned/Prepaid AR Report

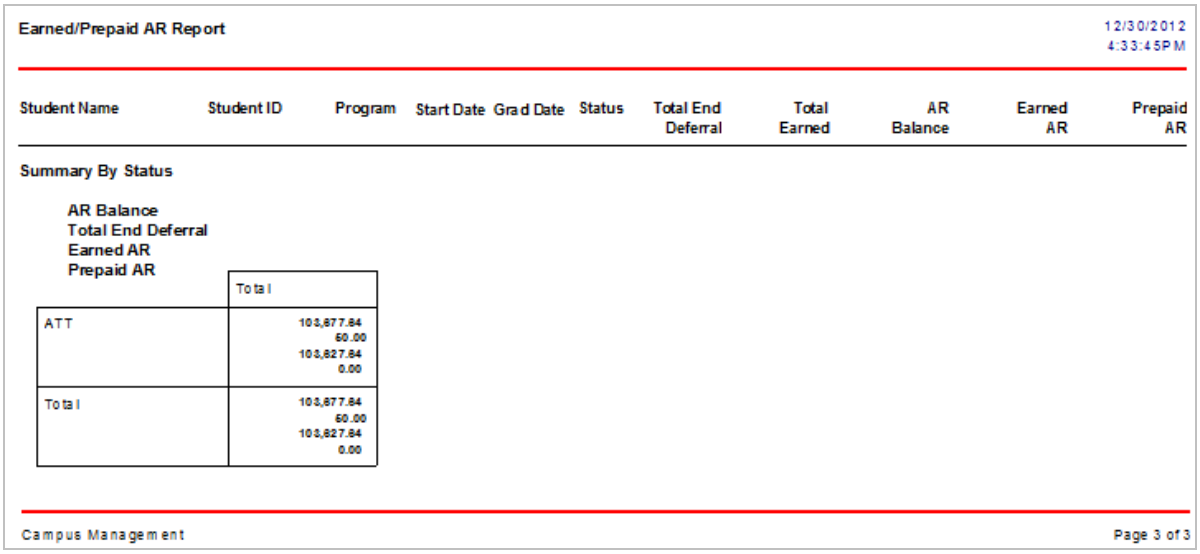
rpt_saEarnedPrepaid.rpt
ADMINISTRATOR

Campus: Campus Management Institute
As Of Date: 12/30/2012
Programs: Facilities Management
Status Codes: Attending

12/30/2012
4:33:45PM

Student Name	Student ID	Program	Start Date	Grad Date	Status	Total End Deferral	Total Earned	AR Balance	Earned AR	Prepaid AR
Adams, Gary M	15269	FAC	10/2/2008	10/12/2009	ATT	50.00	2,875.00	3,779.25	3,729.25	0.00
Alexander, Jane IN USE	429	FAC	9/5/2005	5/22/2009	ATT	0.00	0.00	3,300.00	3,300.00	0.00
Allen, Erik	15888	FAC	1/7/2002	3/22/2002	ATT	0.00	0.00	9,198.00	9,198.00	0.00
Bencivenja, Tatrece	14259	FAC	5/6/2002	3/26/2002	ATT	0.00	0.00	9,198.00	9,198.00	0.00
Brinkley, John O	13225	FAC	5/7/2001	7/10/2000	ATT	0.00	0.00	3,298.00	3,298.00	0.00
Brown, Ann	26601	FAC	9/4/2000	10/30/2002	ATT	0.00	0.00	2,698.00	2,698.00	0.00
Edu, Admission	445	FAC	1/1/2009	9/9/2009	ATT	0.00	0.00	3,300.00	3,300.00	0.00
Edwards, Carrie	15628	FAC	5/7/2001	3/26/2002	ATT	0.00	0.00	9,148.00	9,148.00	0.00
Johnson, Joy-Ann	2	FAC	9/4/2000	4/25/2003	ATT	0.00	0.00	1,578.00	1,578.00	0.00
Newman, Just	26576	FAC	5/7/2001	12/19/2003	ATT	0.00	0.00	3,298.00	3,298.00	0.00
Noles, Joe	13798	FAC	5/7/2001	3/26/2002	ATT	0.00	0.00	9,148.00	9,148.00	0.00
Rush, Debra	14263	FAC	1/7/2002	3/26/2002	ATT	0.00	0.00	9,198.00	9,198.00	0.00
Sanders, Jennifer	26618	FAC	5/7/2001	4/25/2003	ATT	0.00	0.00	6,498.00	6,498.00	0.00
Smith, Jackie	15880	FAC	1/7/2002	3/26/2002	ATT	0.00	0.00	9,198.00	9,198.00	0.00
Tayal, Mike	425	FAC	8/1/2009	10/17/2006	ATT	0.00	0.00	2,494.39	2,494.39	0.00
Vanhaute, Toni	14410	FAC	5/7/2001	3/26/2002	ATT	0.00	0.00	9,148.00	9,148.00	0.00
Young, Renee	15146	FAC	1/7/2002	3/26/2002	ATT	0.00	0.00	9,198.00	9,198.00	0.00
					Report Totals	50.00	2,875.00	103,877.84	103,827.84	0.00

Campus Management
Page 1 of 3



Earned/Prepaid AR Report

12/30/2012
4:33:45PM

Student Name	Student ID	Program	Start Date	Grad Date	Status	Total End Deferral	Total Earned	AR Balance	Earned AR	Prepaid AR

Summary By Status

AR Balance
Total End Deferral
Earned AR
Prepaid AR

	Total
ATT	103,877.84 50.00 103,827.84 0.00
Total	103,877.84 50.00 103,827.84 0.00

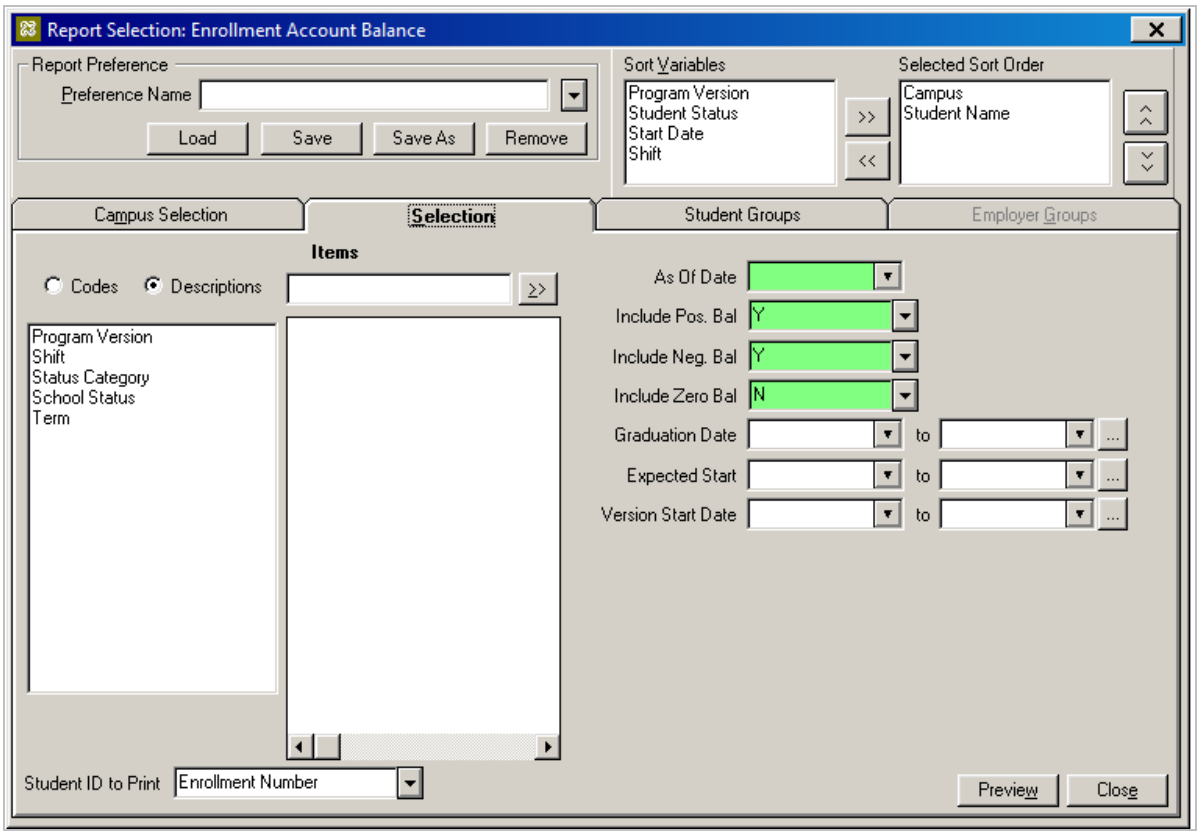
Campus Management
Page 3 of 3

Enrollment Account Balance

This report displays one line for each student enrollment and shows the students' ledger card balances as of a given date. Students are listed alphabetically by name.

To run the report:

1. Navigate to **Reports > Student Accounts > Enrollment Account Balance**. The Report Selection: Enrollment Account Balance form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

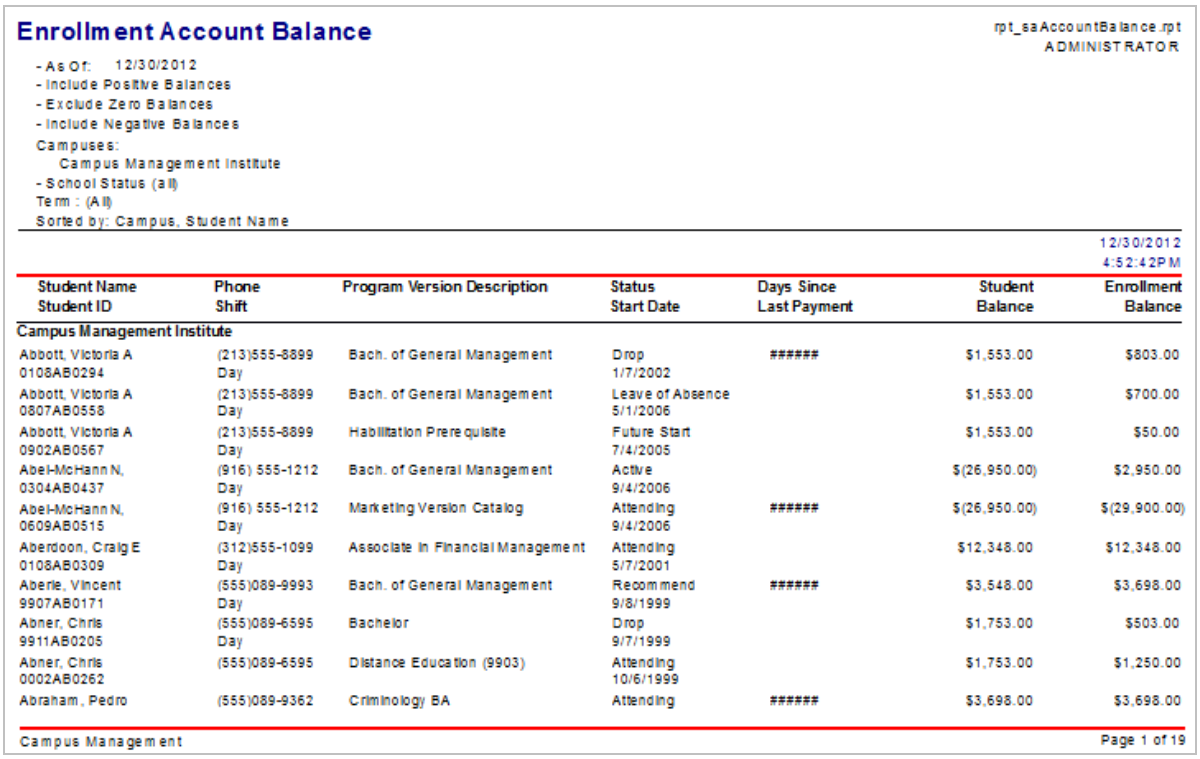
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Student ID
   - Phone
   - Shift
   - Program Version Description

- Student Status
- Start Date
- Number of Days Since Last Payment
- Student Balance
- Enrollment Balance (from all enrollments)

The last page of the report provides grand totals on the Student Balance and Enrollment Balance.



Enrollment Account Balance

rpt_saAccountBalance.rpt
ADMINISTRATOR

- As Of: 12/30/2012
- Include Positive Balances
- Exclude Zero Balances
- Include Negative Balances

Campuses:
Campus Management Institute
- School Status (all)
Term : (All)
Sorted by: Campus, Student Name

12/30/2012
4:52:42PM

Student Name Student ID	Phone Shift	Program Version Description	Status Start Date	Days Since Last Payment	Student Balance	Enrollment Balance
Campus Management Institute						
Abbott, Victoria A 0108AB0294	(213)555-8899 Day	Bach. of General Management	Drop 1/7/2002	######	$1,553.00	$803.00
Abbott, Victoria A 0807AB0558	(213)555-8899 Day	Bach. of General Management	Leave of Absence 5/1/2006		$1,553.00	$700.00
Abbott, Victoria A 0902AB0567	(213)555-8899 Day	Habilitation Prerequisite	Future Start 7/4/2005		$1,553.00	$50.00
Abel-McHann N, 0304AB0437	(916) 555-1212 Day	Bach. of General Management	Active 9/4/2006		$(26,950.00)	$2,950.00
Abel-McHann N, 0609AB0515	(916) 555-1212 Day	Marketing Version Catalog	Attending 9/4/2006	######	$(26,950.00)	$(29,900.00)
Aberdoon, Craig E 0108AB0309	(312)555-1099 Day	Associate in Financial Management	Attending 5/7/2001		$12,348.00	$12,348.00
Aberle, Vincent 9907AB0171	(555)089-9993 Day	Bach. of General Management	Recommend 9/8/1999	######	$3,548.00	$3,698.00
Abner, Chris 9911AB0205	(555)089-6595 Day	Bachelor	Drop 9/7/1999		$1,753.00	$503.00
Abner, Chris 0002AB0262	(555)089-6595	Distance Education (9903)	Attending 10/6/1999		$1,753.00	$1,250.00
Abraham, Pedro	(555)089-9362	Criminology BA	Attending	######	$3,698.00	$3,698.00

Campus Management

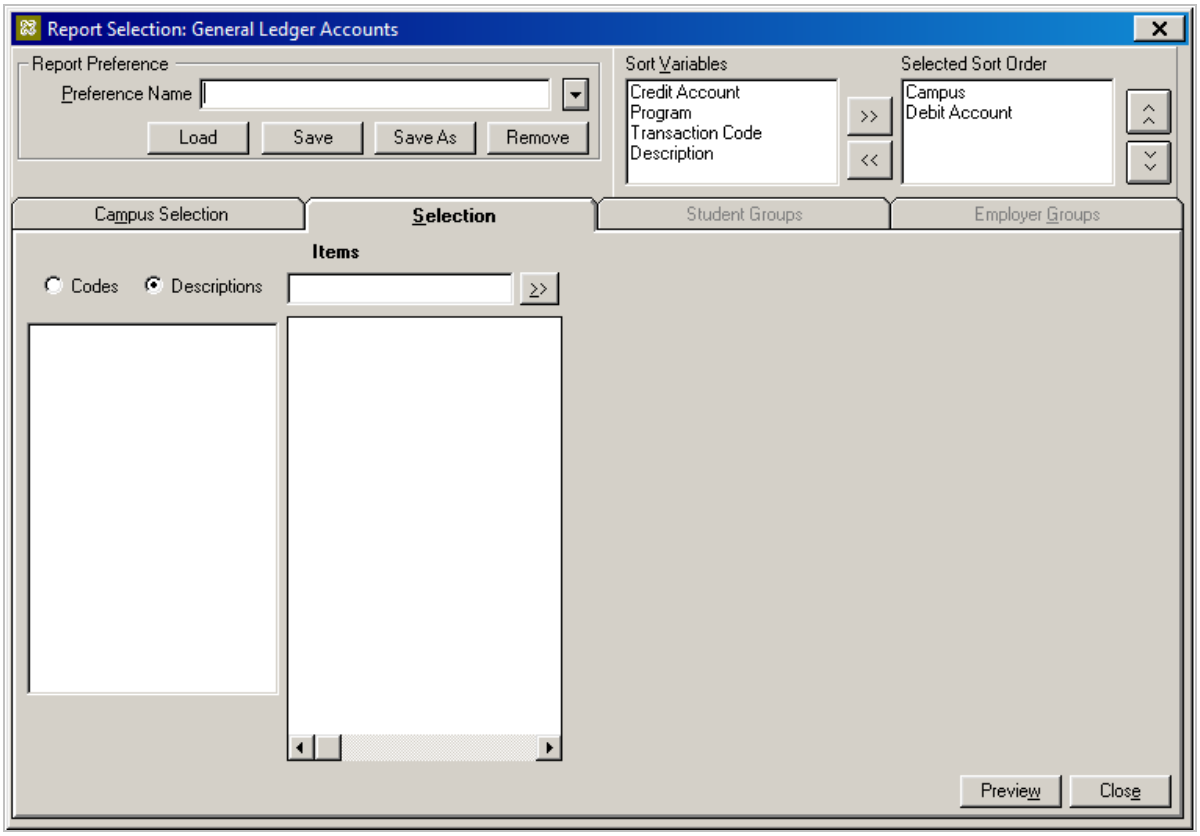
Page 1 of 19

General Ledger Accounts

This report lists the general ledger debit and credit account numbers for the selected transaction codes.

To run the report:

1. Navigate to **Reports > Student Accounts > General Ledger Accounts**. The Report Selection: General Ledger Accounts form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Transaction Code
   - Description
   - Program
   - Debit Account

- Credit Account

General Ledger Accounts

rpt_saglilnk.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute

Sorted by: Campus, Debit Account

12/31/2012
9:22:05AM

Code	Description	Program	Debit Account	Credit Account
Campus Management Institute				
ADMIN	Administration Fee (Deferred)	ALL Programs	11000-000	45000-000
ADMIN	Administration Fee (Earned)	ALL Programs	45000-000	
AMDEP	Deposit	ALL Programs	11000-000	45000-000
APLAN	Scholarship A plan	ALL Programs	10115-002	20115-002
APLAN	Scholarship A plan	ALL Programs	20115-002	10115-002
ARTSUP	Art Supplies	ALL Programs	11000-000	45000-000
ATTENDNC	Attendance	ALL Programs	11000-000	
BKSMISC	Bookstore Miscellaneous Sales	ALL Programs	11000-000	45000-000
CASH	Student Payments	ALL Programs	10105-002	20105-002
CASH	Student Payments	ALL Programs	20105-002	10105-002
COMP	Computer Services	ALL Programs	11000-000	45000-000
DIRPLUS	Federal Dir Parent Loan Undergr	ALL Programs	10085-002	20085-002
DIRPLUS	Federal Dir Parent Loan Undergr	ALL Programs	20085-002	10085-002
DIRSUB	Federal Direct Subsidized Loan	ALL Programs	10045-002	20045-002
DIRSUB	Federal Direct Subsidized Loan	ALL Programs	20045-002	10045-002
DIRUNSUB	Federal Direct Unsubsidized Loan	ALL Programs	10055-002	20055-002
DIRUNSUB	Federal Direct Unsubsidized Loan	ALL Programs	20055-002	10055-002
DROPFEE	Fee for dropping a class from this	ALL Programs	11000-000	45000-000
DROPFEE	Fee for dropping a class from this	ALL Programs	45000-000	
EXAMR	Exam Retake Fee	ALL Programs	11000-000	45000-000
EXTCRSE	Course Extension Fee	ALL Programs	11000-000	45000-000
EXTLSN	Extension Fee Per Lesson (Deferred)	ALL Programs	11000-000	45000-000
EXTLSN	Extension Fee Per Lesson (Earned)	ALL Programs	45000-000	
FOOD	Food Service	ALL Programs	11000-000	45000-000
FSEOG	Federal Supplemental Educ. Opp.	ALL Programs	10015-002	20015-002
FSEOG	Federal Supplemental Educ. Opp.	ALL Programs	20015-002	10015-002

Campus Management

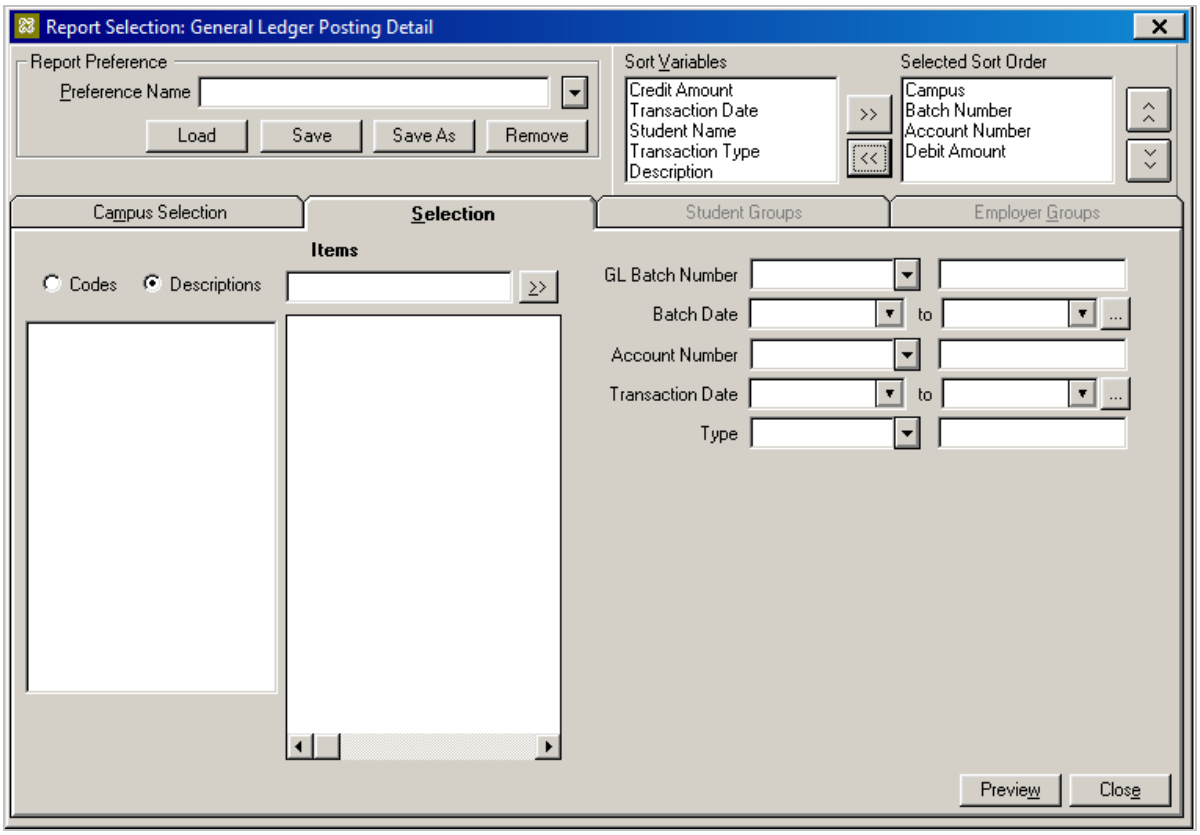
Page 1 of 4

General Ledger Posting Detail

This report lists selected general ledger transaction posting details. When printed from the Reports menu, the General Ledger Detail report prints only posted batches.

To run the report:

1. Navigate to **Reports > Student Accounts > General Ledger Posting Detail**. The Report Selection: General Ledger Posting Detail form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



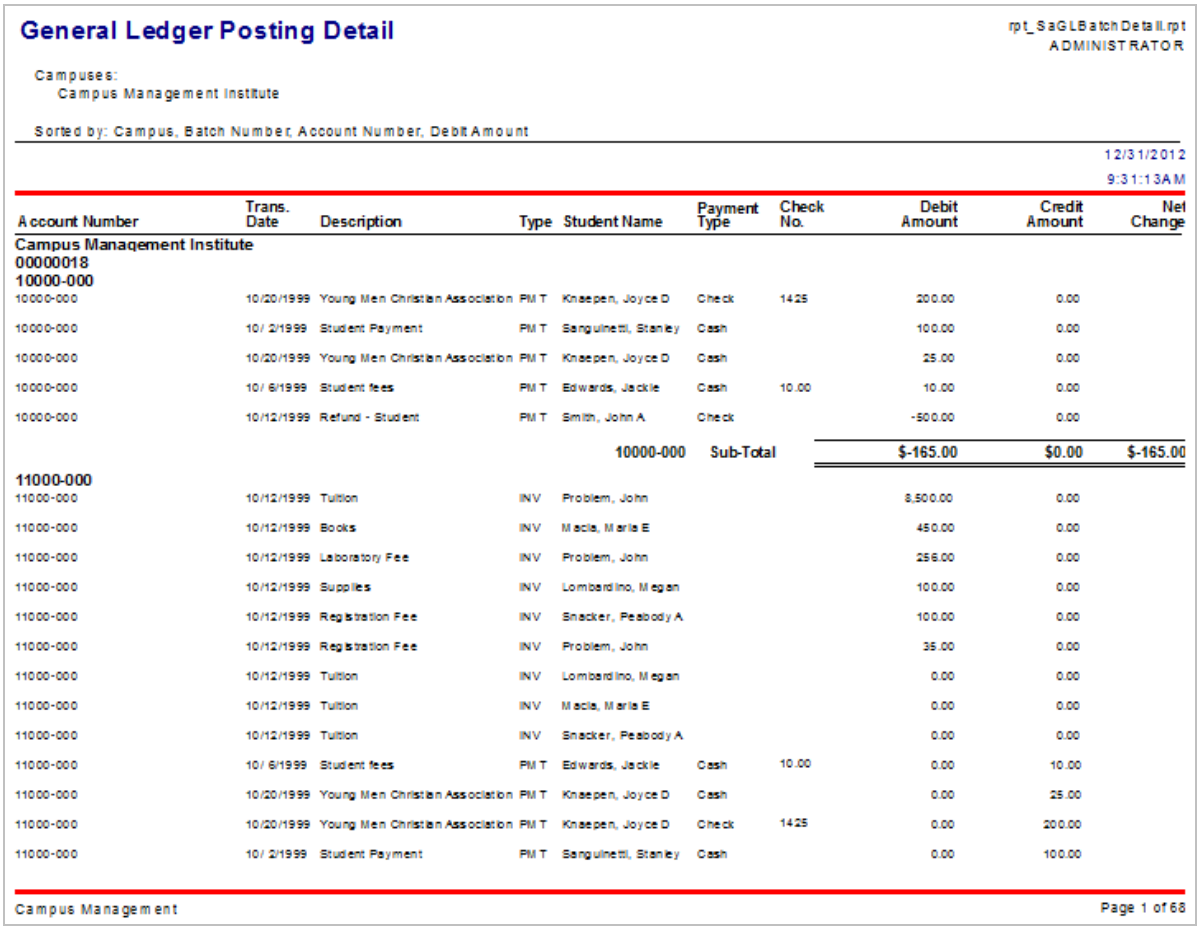
4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Campus
   - Account Number
   - Transaction Date
   - Description
   - Transaction Type
   - Student Name
   - Payment Type
   - Check Number
   - Debit Amount

- Credit Amount
- Net Change

Group and grand totals are included for the amount fields.



General Ledger Posting Detail

rpt_SaGLBatchDetail.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute

Sorted by: Campus, Batch Number, Account Number, Debit Amount

12/31/2012
9:31:13 AM

Account Number	Trans. Date	Description	Type	Student Name	Payment Type	Check No.	Debit Amount	Credit Amount	Net Change
Campus Management Institute									
00000018									
10000-000									
10000-000	10/20/1999	Young Men Christian Association	PMT	Knaepen, Joyce D	Check	1425	200.00	0.00	
10000-000	10/ 2/1999	Student Payment	PMT	Sanguinetti, Stanley	Cash		100.00	0.00	
10000-000	10/20/1999	Young Men Christian Association	PMT	Knaepen, Joyce D	Cash		25.00	0.00	
10000-000	10/ 6/1999	Student fees	PMT	Edwards, Jackie	Cash	10.00	10.00	0.00	
10000-000	10/12/1999	Refund - Student	PMT	Smith, John A	Check		-500.00	0.00	
				10000-000	**Sub-Total**		**$-165.00**	**$0.00**	**$-165.00**
11000-000									
11000-000	10/12/1999	Tuition	INV	Problem, John			8,500.00	0.00	
11000-000	10/12/1999	Books	INV	Macia, Maria E			450.00	0.00	
11000-000	10/12/1999	Laboratory Fee	INV	Problem, John			256.00	0.00	
11000-000	10/12/1999	Supplies	INV	Lombardino, Megan			100.00	0.00	
11000-000	10/12/1999	Registration Fee	INV	Snacker, Peabody A			100.00	0.00	
11000-000	10/12/1999	Registration Fee	INV	Problem, John			35.00	0.00	
11000-000	10/12/1999	Tuition	INV	Lombardino, Megan			0.00	0.00	
11000-000	10/12/1999	Tuition	INV	Macia, Maria E			0.00	0.00	
11000-000	10/12/1999	Tuition	INV	Snacker, Peabody A			0.00	0.00	
11000-000	10/ 6/1999	Student fees	PMT	Edwards, Jackie	Cash	10.00	0.00	10.00	
11000-000	10/20/1999	Young Men Christian Association	PMT	Knaepen, Joyce D	Cash		0.00	25.00	
11000-000	10/20/1999	Young Men Christian Association	PMT	Knaepen, Joyce D	Check	1425	0.00	200.00	
11000-000	10/ 2/1999	Student Payment	PMT	Sanguinetti, Stanley	Cash		0.00	100.00	

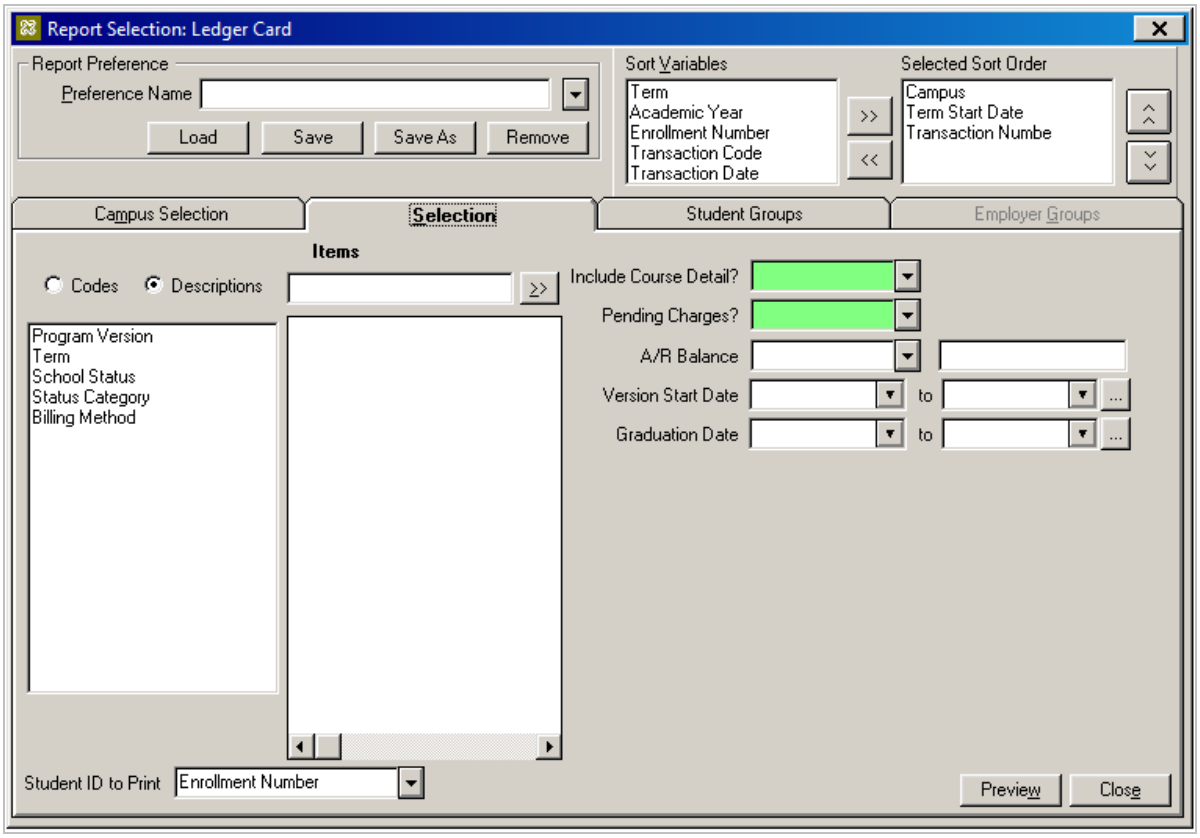
Campus Management
Page 1 of 68

Ledger Card Report

This report produces a ledger card for each student selected. Transactions on each ledger card are separated by enrollment. The combined current balance for all enrollments is displayed at the top of the report along with student identification data. When you print the Ledger Card report for students with multiple enrollments, the current (most recent) status is listed.

To run the report:

1. Navigate to **Reports > Student Accounts > Ledger Card**. The Report Selection: Ledger Card form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The student information section displays the following:

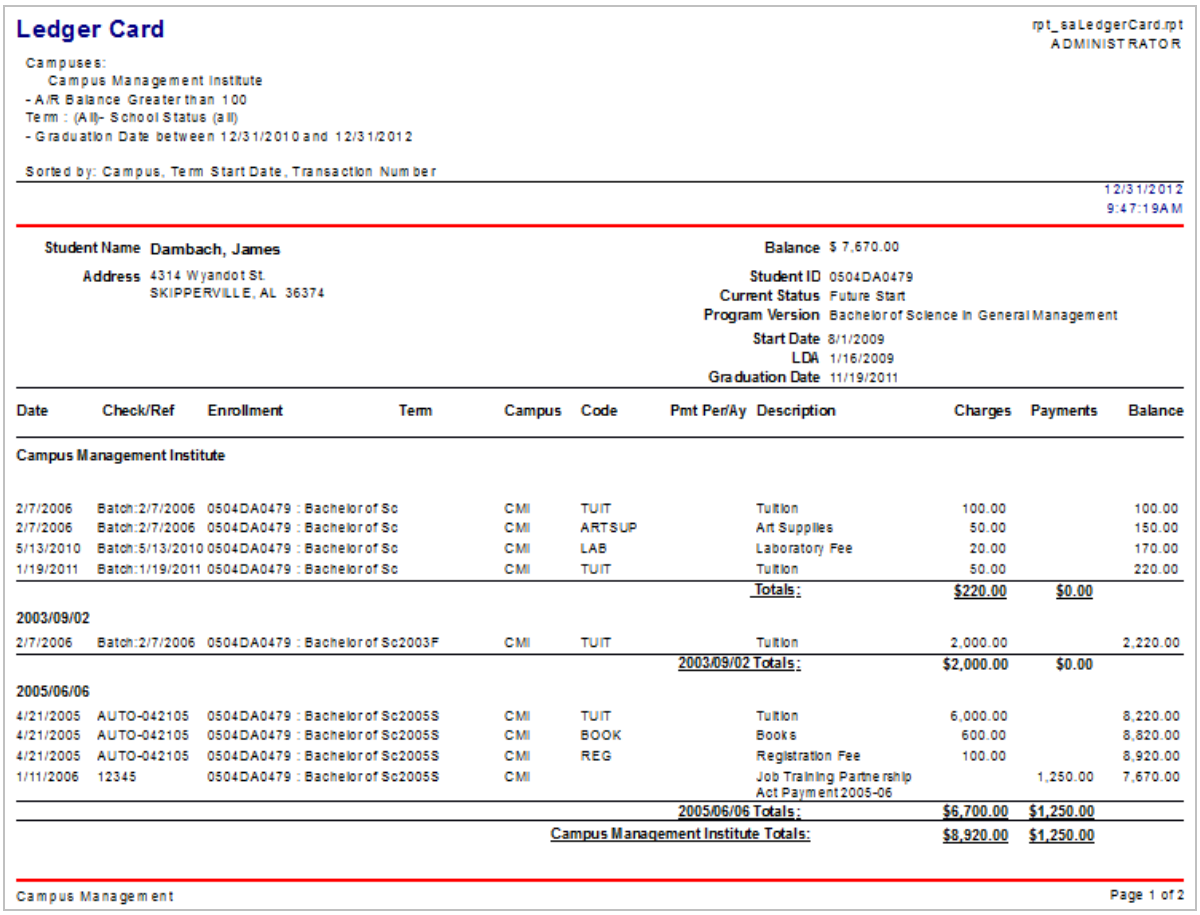
   - Student Name, Address, and ID
   - Balance
   - Current Status
   - Program Version
   - Start Date

- Last Date Attended
- Graduation Date

The detail lines provide the following:

- Date
- Check/Reference Number
- Enrollment
- Term
- Campus
- Charge Code
- Payment Period/Academic Year Description
- Charges
- Payments
- Balance

Group and grand totals are included for the amount fields.



Ledger Card

rpt_saLedgerCard.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- A/R Balance Greater than 100
Term : (All)- School Status (all)
- Graduation Date between 12/31/2010 and 12/31/2012

Sorted by: Campus, Term Start Date, Transaction Number

12/31/2012
9:47:19AM

Student Name Dambach, James
Address 4314 Wyandot St.
SKIPPERVILLE, AL 36374

Balance $ 7,670.00
Student ID 0504DA0479
Current Status Future Start
Program Version Bachelor of Science in General Management
Start Date 8/1/2009
LDA 1/16/2009
Graduation Date 11/19/2011

Date	Check/Ref	Enrollment	Term	Campus	Code	Pmt Per/Ay	Description	Charges	Payments	Balance
Campus Management Institute										
2/7/2006	Batch:2/7/2006	0504DA0479 : Bachelor of Sc		CMI	TUIT		Tuition	100.00		100.00
2/7/2006	Batch:2/7/2006	0504DA0479 : Bachelor of Sc		CMI	ARTSUP		Art Supplies	50.00		150.00
5/13/2010	Batch:5/13/2010	0504DA0479 : Bachelor of Sc		CMI	LAB		Laboratory Fee	20.00		170.00
1/19/2011	Batch:1/19/2011	0504DA0479 : Bachelor of Sc		CMI	TUIT		Tuition	50.00		220.00
							Totals:	$220.00	$0.00	
2003/09/02										
2/7/2006	Batch:2/7/2006	0504DA0479 : Bachelor of Sc2003F		CMI	TUIT		Tuition	2,000.00		2,220.00
							2003/09/02 Totals:	$2,000.00	$0.00	
2005/06/06										
4/21/2005	AUTO-042105	0504DA0479 : Bachelor of Sc2005S		CMI	TUIT		Tuition	6,000.00		8,220.00
4/21/2005	AUTO-042105	0504DA0479 : Bachelor of Sc2005S		CMI	BOOK		Books	600.00		8,820.00
4/21/2005	AUTO-042105	0504DA0479 : Bachelor of Sc2005S		CMI	REG		Registration Fee	100.00		8,920.00
1/11/2006	12345	0504DA0479 : Bachelor of Sc2005S		CMI			Job Training Partnership Act Payment 2005-06		1,250.00	7,670.00
							2005/06/06 Totals:	$6,700.00	$1,250.00	
							Campus Management Institute Totals:	$8,920.00	$1,250.00	

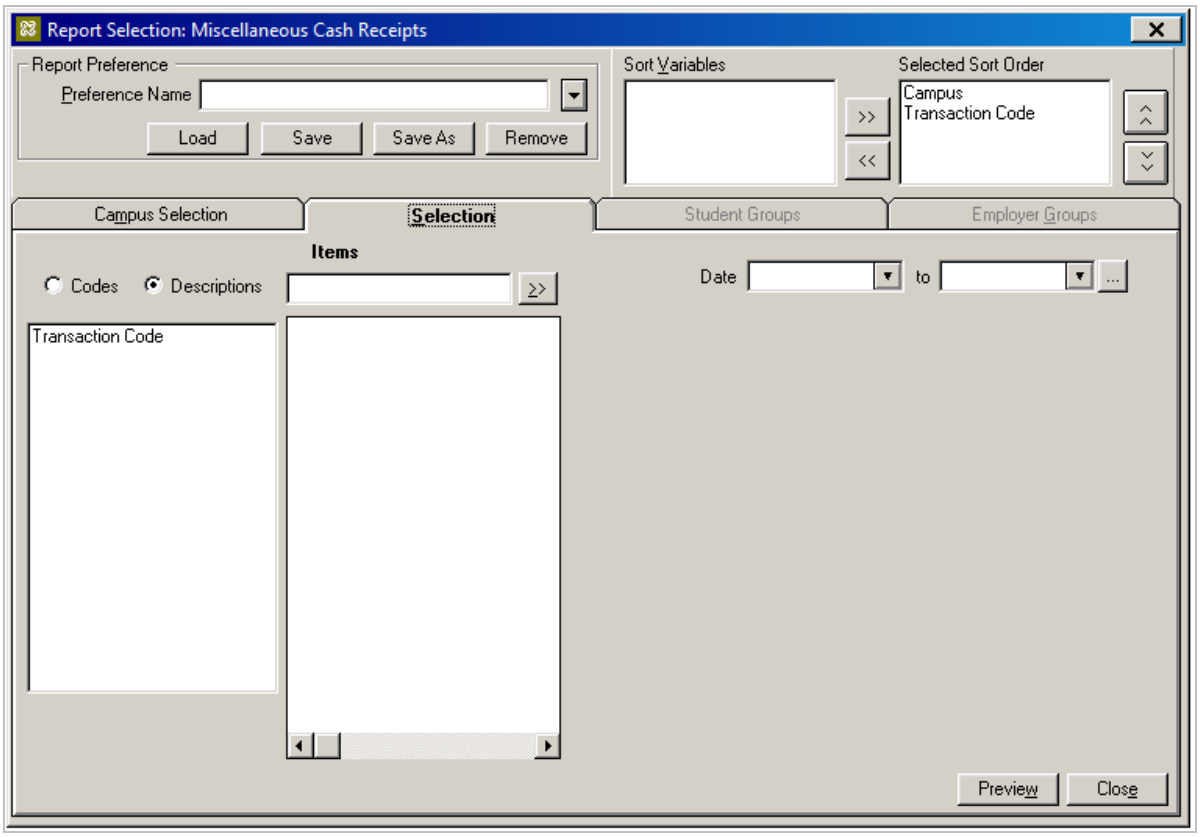
Campus Management
Page 1 of 2

Miscellaneous Cash Receipts

This report lists miscellaneous cash receipts from sources other than students; for example, bookstore or vending machine sales.

To run the report:

1. Navigate to **Reports > Student Accounts > Miscellaneous Cash Receipts**. The Report Selection: Miscellaneous Cash Receipts form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



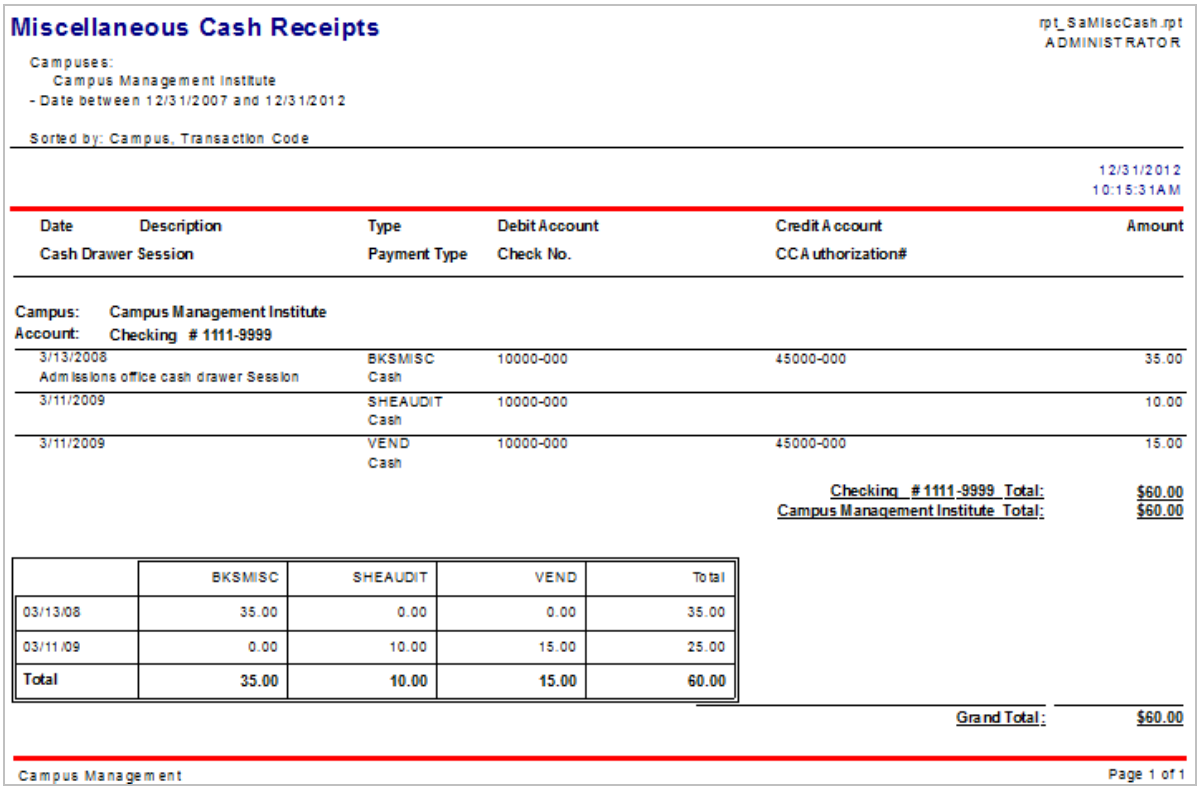
4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Campus
   - Account Description
   - Payment Type
   - Date
   - Transaction Code (Type)
   - Transaction Description
   - Amount

   Totals are provided at the account, campus, and report levels.

A cross-tabulated summary is displayed in the report footer. For each campus, there are amount-received totals for each date broken down by transaction code (type).



Miscellaneous Cash Receipts

rpt_SaMiscCash.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- Date between 12/31/2007 and 12/31/2012

Sorted by: Campus, Transaction Code

12/31/2012
10:15:31AM

Date	Description	Type	Debit Account	Credit Account	Amount
Cash Drawer Session		Payment Type	Check No.	CC Authorization#	
Campus:	**Campus Management Institute**				
Account:	**Checking # 1111-9999**				
3/13/2008	Admissions office cash drawer Session	BKSMISC Cash	10000-000	45000-000	35.00
3/11/2009		SHEAUDIT Cash	10000-000		10.00
3/11/2009		VEND Cash	10000-000	45000-000	15.00
				Checking # 1111-9999 Total:	$60.00
				Campus Management Institute Total:	$60.00

	BKSMISC	SHEAUDIT	VEND	Total
03/13/08	35.00	0.00	0.00	35.00
03/11/09	0.00	10.00	15.00	25.00
Total	**35.00**	**10.00**	**15.00**	**60.00**

Grand Total: $60.00

Campus Management

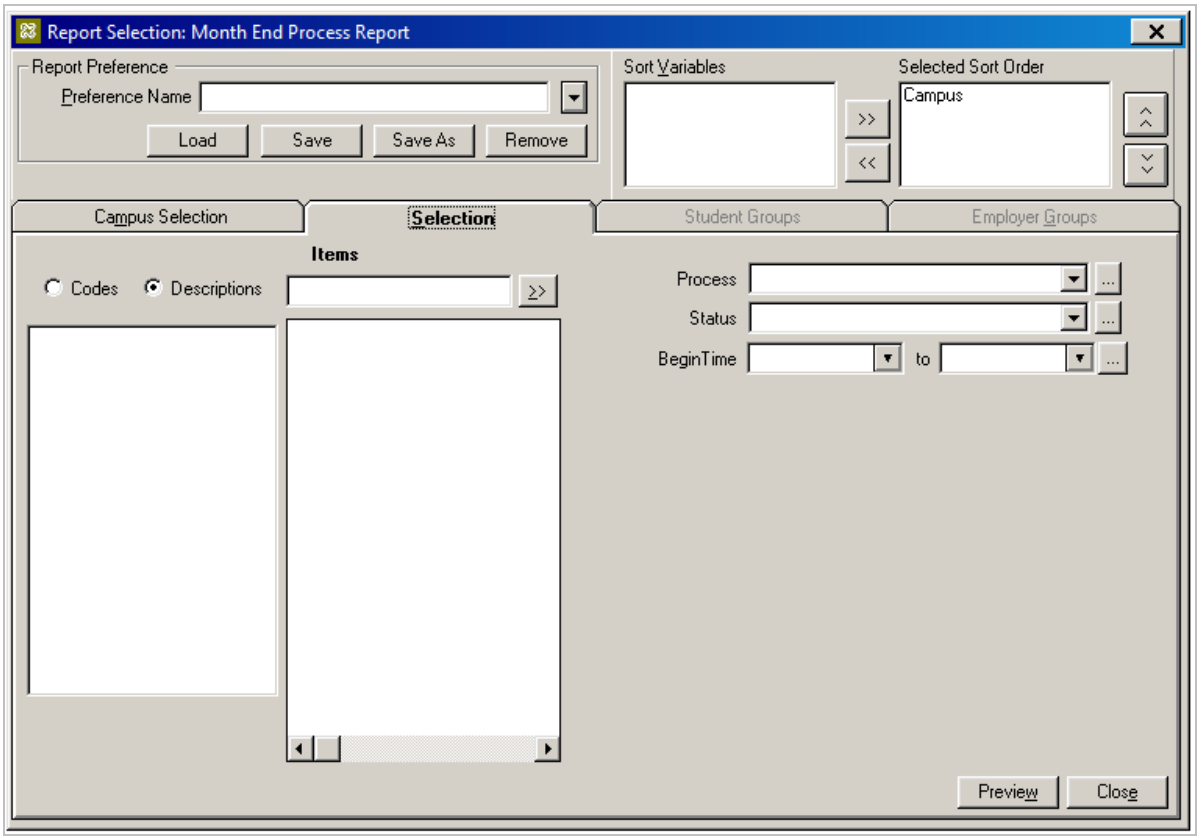
Page 1 of 1

Month End Process Report

This report provides student account data for the month end accounting process.

To run the report:

1. Navigate to **Reports > Student Accounts > Month End Process Report**. The Report Selection: Month End Process Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



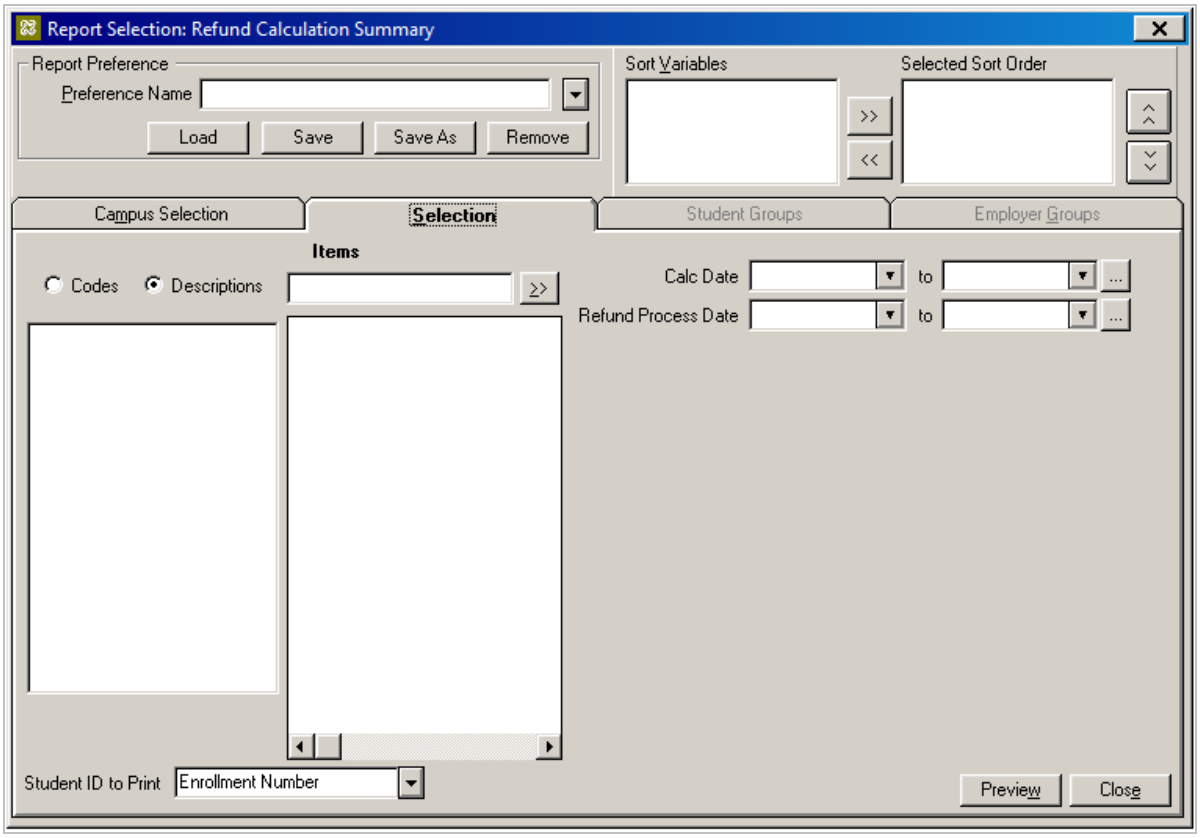
4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

Refund Calculation Summary

This report provides a summary of refunds calculated.

To run the report:

1. Navigate to **Reports > Student Accounts > Refund Calculation Summary**. The Report Selection: Refund Calculation Summary form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

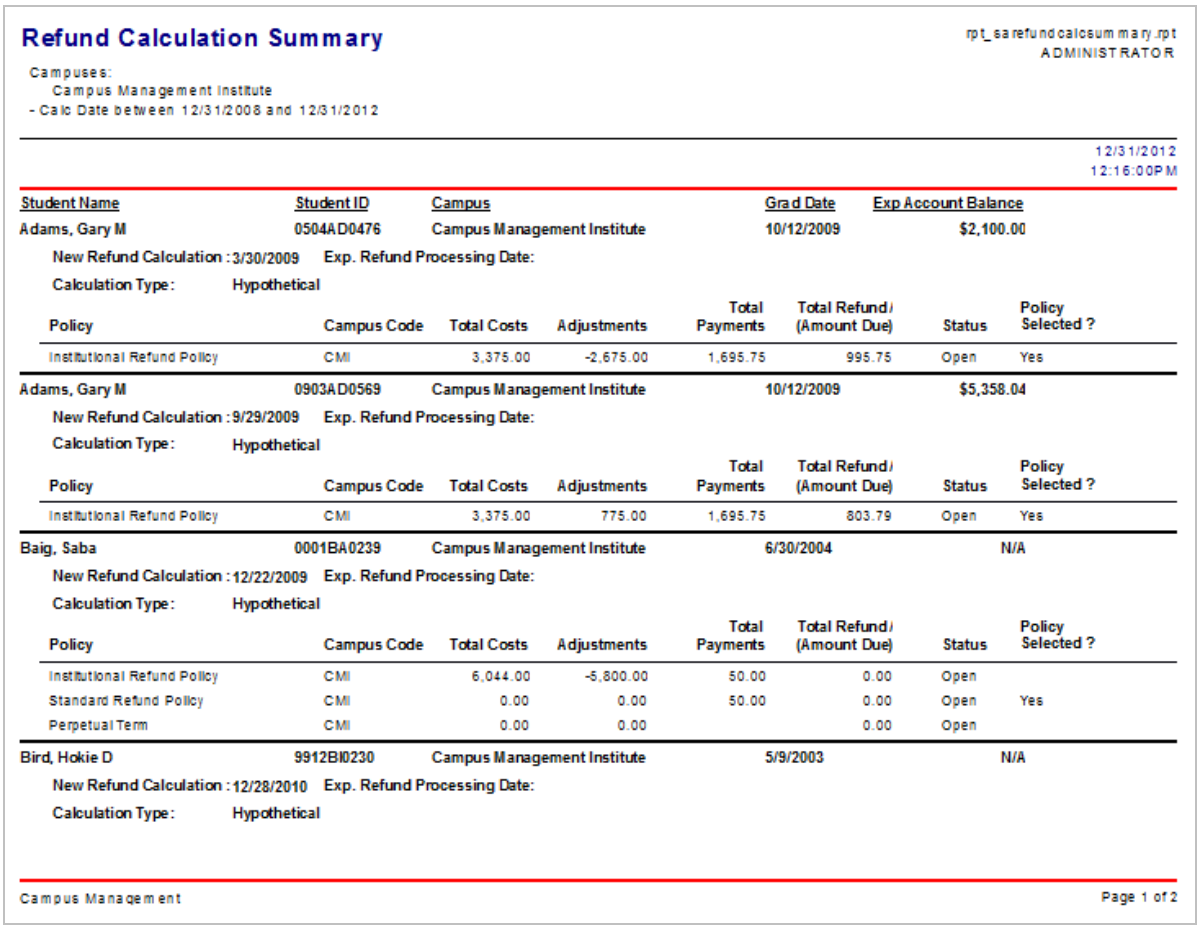


4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Student ID
   - Graduation Date
   - Calculation Type
   - Calculation Date
   - Policy Description
   - Campus Code
   - Total Costs
   - Adjustments
   - Total Payments

- Total Refund (Amount Due)
- Status
- Policy Selected indicator



Refund Calculation Summary

rpt_sarefundcalcsummary.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- Calc Date between 12/31/2008 and 12/31/2012

12/31/2012
12:16:00PM

Student Name	Student ID	Campus	Grad Date	Exp Account Balance
Adams, Gary M	0504AD0476	Campus Management Institute	10/12/2009	$2,100.00

New Refund Calculation : 3/30/2009 Exp. Refund Processing Date:
Calculation Type: Hypothetical

Policy	Campus Code	Total Costs	Adjustments	Total Payments	Total Refund/ (Amount Due)	Status	Policy Selected ?
Institutional Refund Policy	CMI	3,375.00	-2,675.00	1,695.75	995.75	Open	Yes

Student Name	Student ID	Campus	Grad Date	Exp Account Balance
Adams, Gary M	0903AD0569	Campus Management Institute	10/12/2009	$5,358.04

New Refund Calculation : 9/29/2009 Exp. Refund Processing Date:
Calculation Type: Hypothetical

Policy	Campus Code	Total Costs	Adjustments	Total Payments	Total Refund/ (Amount Due)	Status	Policy Selected ?
Institutional Refund Policy	CMI	3,375.00	775.00	1,695.75	803.79	Open	Yes

Student Name	Student ID	Campus	Grad Date	Exp Account Balance
Baig, Saba	0001BA0239	Campus Management Institute	6/30/2004	N/A

New Refund Calculation : 12/22/2009 Exp. Refund Processing Date:
Calculation Type: Hypothetical

Policy	Campus Code	Total Costs	Adjustments	Total Payments	Total Refund/ (Amount Due)	Status	Policy Selected ?
Institutional Refund Policy	CMI	6,044.00	-5,800.00	50.00	0.00	Open	
Standard Refund Policy	CMI	0.00	0.00	50.00	0.00	Open	Yes
Perpetual Term	CMI	0.00	0.00		0.00	Open	

Student Name	Student ID	Campus	Grad Date	Exp Account Balance
Bird, Hokie D	9912BI0230	Campus Management Institute	5/9/2003	N/A

New Refund Calculation : 12/28/2010 Exp. Refund Processing Date:
Calculation Type: Hypothetical

Campus Management
Page 1 of 2

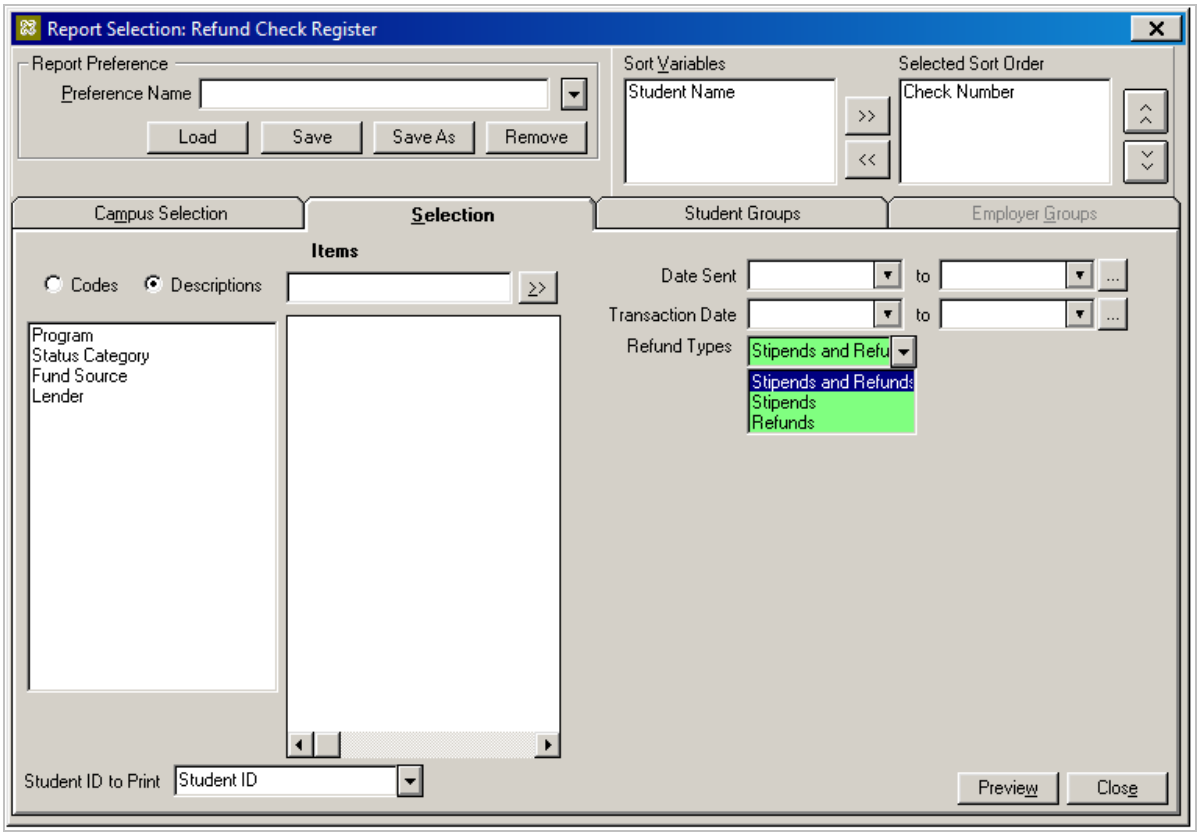
Refund Check Register

This report provides users with information needed to reconcile Refunds and Stipends when closing the accounting period.

If CampusNexus Student is integrated with an accounting system, refer to Release to Integrated Accounting System.

To run the report:

1. Navigate to **Reports > Student Accounts > Refund Check Register**. The Report Selection: Refund Check Register form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

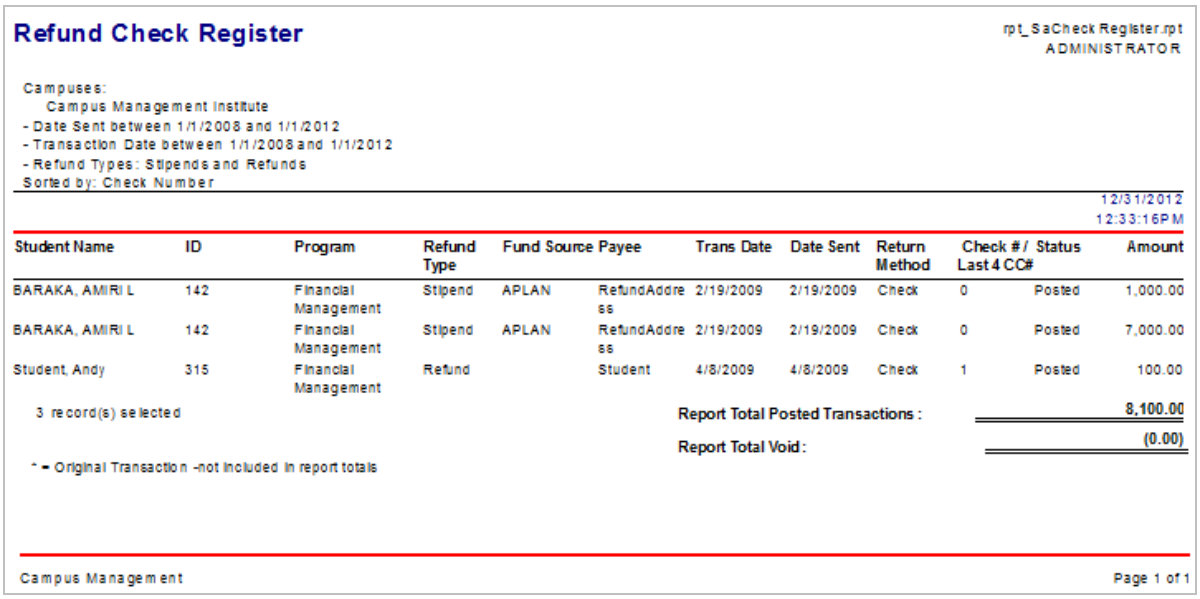
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Student ID
   - Program
   - Refund Type
   - Fund Source

- Transaction Date
- Date Sent
- Return Method
- Check # / Last 4 CC#
- Status (Transaction)
- Amounts associated with the transaction (refund or stipend)

The report is sorted by student name and check number. Posted and Voided transactions are displayed. Totals include the sum of all transactions posted and the sum of all voided transactions (negative amounts).



Refund Check Register

rpt_SaCheckRegister.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- Date Sent between 1/1/2008 and 1/1/2012
- Transaction Date between 1/1/2008 and 1/1/2012
- Refund Types: Stipends and Refunds
Sorted by: Check Number

12/31/2012
12:33:16PM

Student Name	ID	Program	Refund Type	Fund Source	Payee	Trans Date	Date Sent	Return Method	Check # / Last 4 CC#	Status	Amount
BARAKA, AMIRI L	142	Financial Management	Stipend	APLAN	RefundAddress	2/19/2009	2/19/2009	Check	0	Posted	1,000.00
BARAKA, AMIRI L	142	Financial Management	Stipend	APLAN	RefundAddress	2/19/2009	2/19/2009	Check	0	Posted	7,000.00
Student, Andy	315	Financial Management	Refund		Student	4/8/2009	4/8/2009	Check	1	Posted	100.00

3 record(s) selected

Report Total Posted Transactions : 8,100.00

Report Total Void : (0.00)

* = Original Transaction -not included in report totals

Campus Management

Page 1 of 1

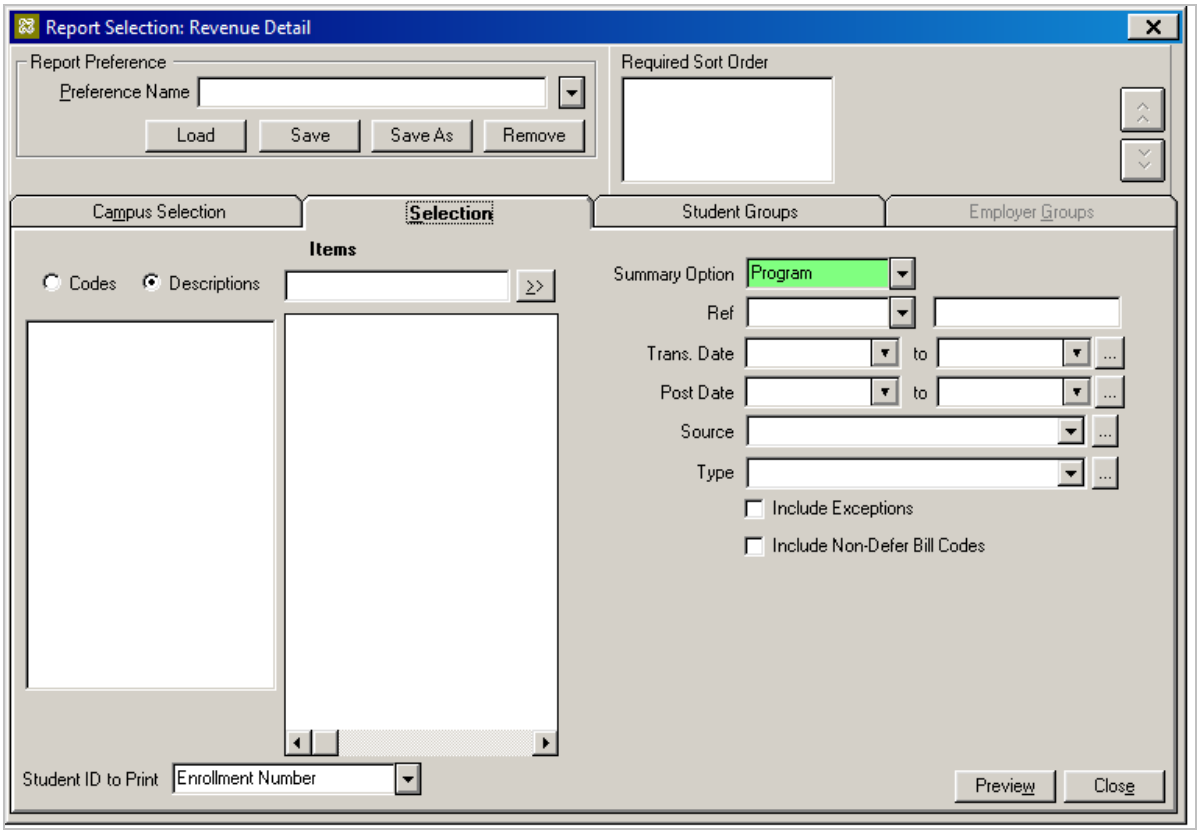
Revenue Detail

This report lists unearned and earned revenue activity by student.

To run the report:

1. Navigate to **Reports > Student Accounts > Revenue Detail**. The Report Selection: Revenue Detail form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

    - The Summary options are 'Program' and 'Program & Status'.
    - The Source options are 'Adjustment' and 'Revenue Recognition'.
    - The Type options are 'Deferred Earnings' and 'Earnings'.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

    Note: If you filter data by Student Groups, the Selection tab filters do not apply.

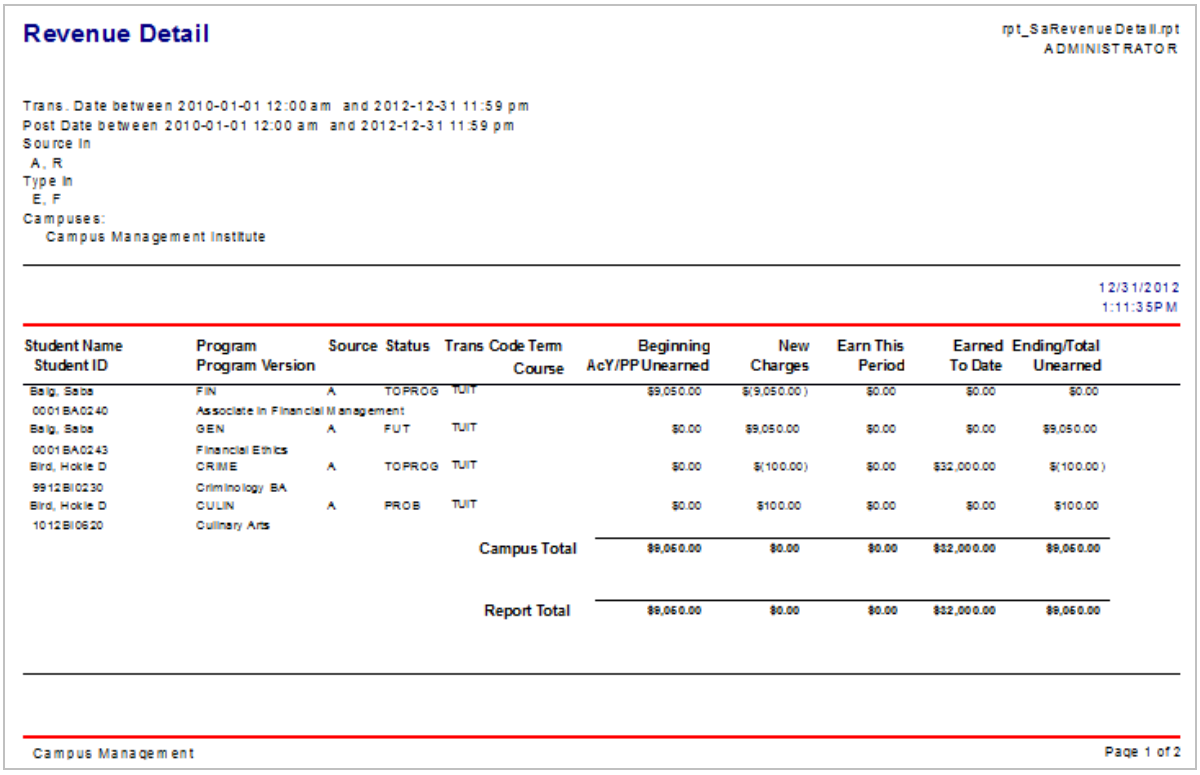
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

    The report displays the following details:

    - Student Name
    - Student ID
    - Program

- Program Version
- Fund Source
- Student Status
- Transaction Code
- Term
- Course
- Beginning Academic Year/Payment Period Unearned
- New Charges
- Earned this Period
- Earner to Date
- Ending/Total Unearned

The Summary displays revenue amounts with Student Count per Program or Program & Status.



Revenue Detail

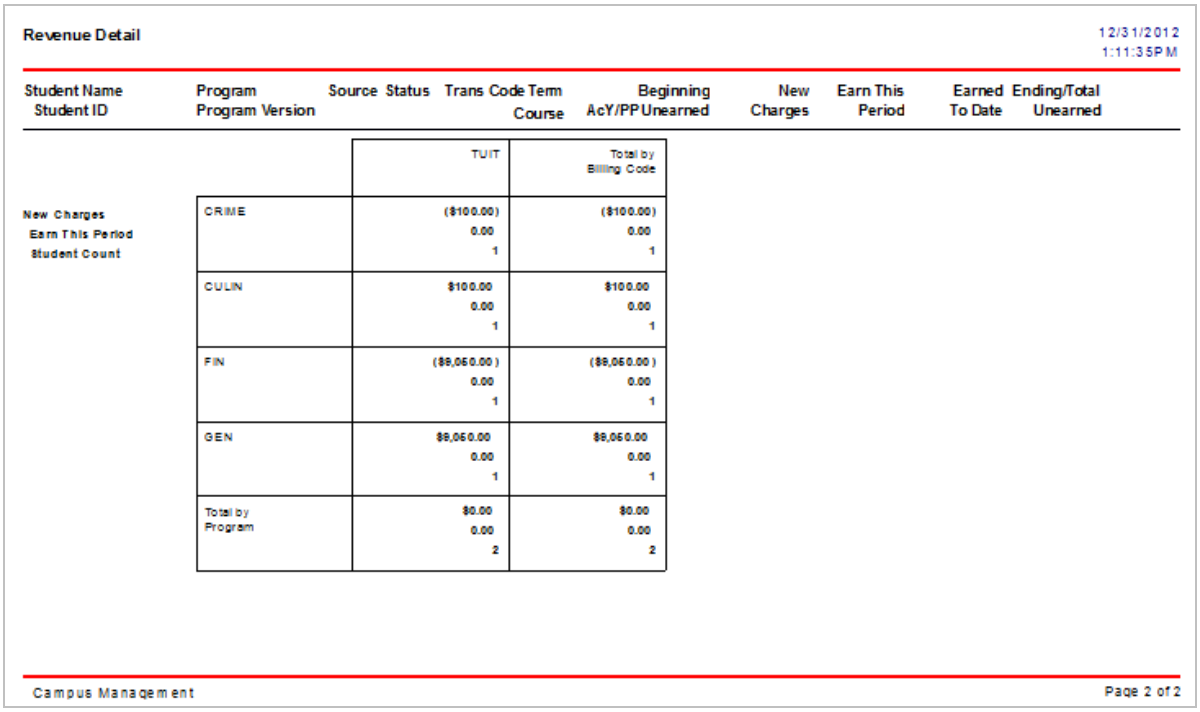
rpt_SaRevenueDetail.rpt
ADMINISTRATOR

Trans. Date between 2010-01-01 12:00 am and 2012-12-31 11:59 pm
Post Date between 2010-01-01 12:00 am and 2012-12-31 11:59 pm
Source In
A, R
Type In
E, F
Campuses:
Campus Management Institute

12/31/2012
1:11:35 PM

Student Name / Student ID	Program / Program Version	Source	Status	Trans Code	Term / Course	Beginning AcY/PP Unearned	New Charges	Earn This Period	Earned To Date	Ending/Total Unearned
Balg, Saba	FIN	A	TOPROG	TUIT		$9,050.00	$(9,050.00)	$0.00	$0.00	$0.00
0001BA0240	Associate in Financial Management									
Balg, Saba	GEN	A	FUT	TUIT		$0.00	$9,050.00	$0.00	$0.00	$9,050.00
0001BA0243	Financial Ethics									
Bird, Hokie D	CRIME	A	TOPROG	TUIT		$0.00	$(100.00)	$0.00	$32,000.00	$(100.00)
9912BI0230	Criminology BA									
Bird, Hokie D	CULIN	A	PROB	TUIT		$0.00	$100.00	$0.00	$0.00	$100.00
1012BI0620	Culinary Arts									
					Campus Total	$9,050.00	$0.00	$0.00	$32,000.00	$9,050.00
					Report Total	$9,050.00	$0.00	$0.00	$32,000.00	$9,050.00

Campus Management
Page 1 of 2



Revenue Detail

12/31/2012
1:11:35PM

Student Name / Student ID	Program / Program Version	Source	Status	Trans Code / Term / Course	Beginning AcY/PP Unearned	New Charges	Earn This Period	Earned To Date	Ending/Total Unearned
				TUIT	Total by Billing Code				
New Charges Earn This Period Student Count	CRIME			($100.00) 0.00 1	($100.00) 0.00 1				
	CULIN			$100.00 0.00 1	$100.00 0.00 1				
	FIN			($8,050.00) 0.00 1	($8,050.00) 0.00 1				
	GEN			$8,050.00 0.00 1	$8,050.00 0.00 1				
	Total by Program			$0.00 0.00 2	$0.00 0.00 2				

Campus Management

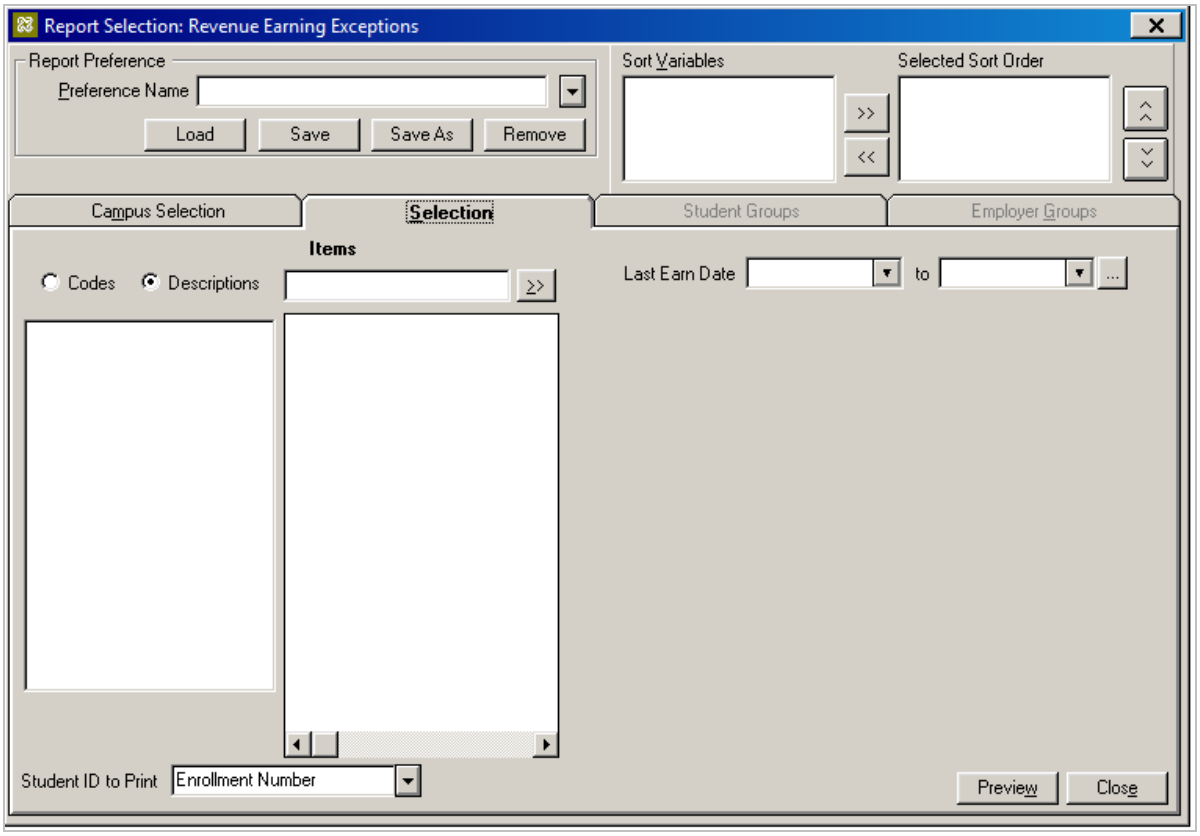
Page 2 of 2

Revenue Earning Exceptions

This report lists revenue earning exceptions including the reasons for the exceptions.

To run the report:

1. Navigate to **Reports > Student Accounts > Revenue Earning Exceptions**. The Report Selection: Revenue Earning Exceptions form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

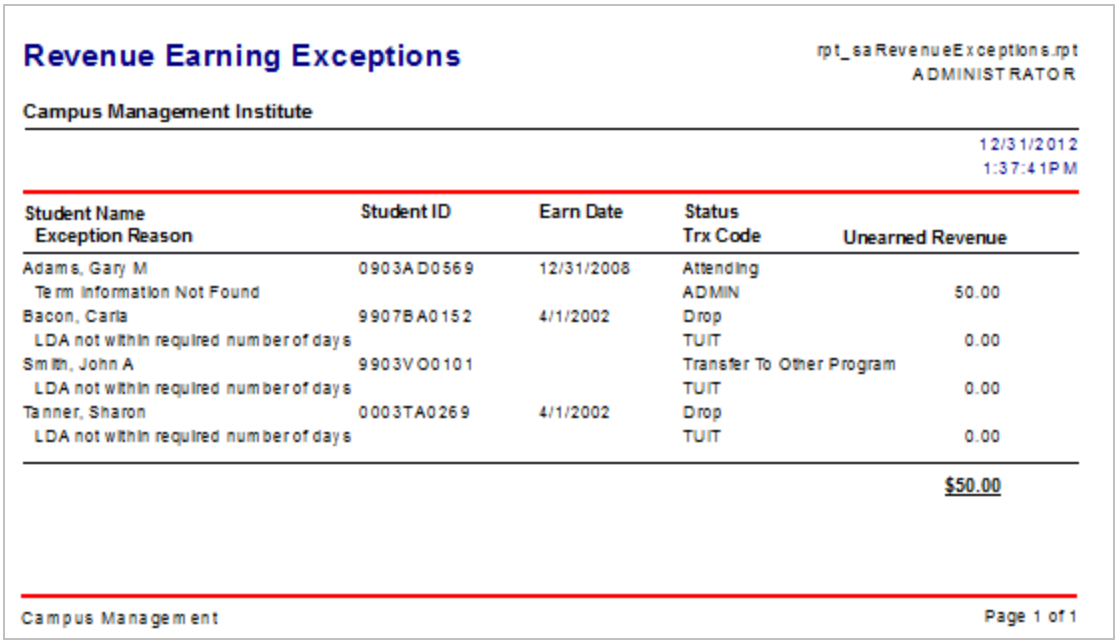


4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Student ID
   - Earned Date
   - Student Status
   - Exception Reason
   - TRX Code (transaction code associated with the revenue type cross-reference)
   - Unearned Revenue Amount

The report displays the total of unearned revenue.



Revenue Earning Exceptions

rpt_saRevenueExceptions.rpt
ADMINISTRATOR

Campus Management Institute

12/31/2012
1:37:41PM

Student Name Exception Reason	Student ID	Earn Date	Status Trx Code	Unearned Revenue
Adams, Gary M	0903AD0569	12/31/2008	Attending	
Term Information Not Found			ADMIN	50.00
Bacon, Carla	9907BA0152	4/1/2002	Drop	
LDA not within required number of days			TUIT	0.00
Smith, John A	9903VO0101		Transfer To Other Program	
LDA not within required number of days			TUIT	0.00
Tanner, Sharon	0003TA0269	4/1/2002	Drop	
LDA not within required number of days			TUIT	0.00
				$50.00

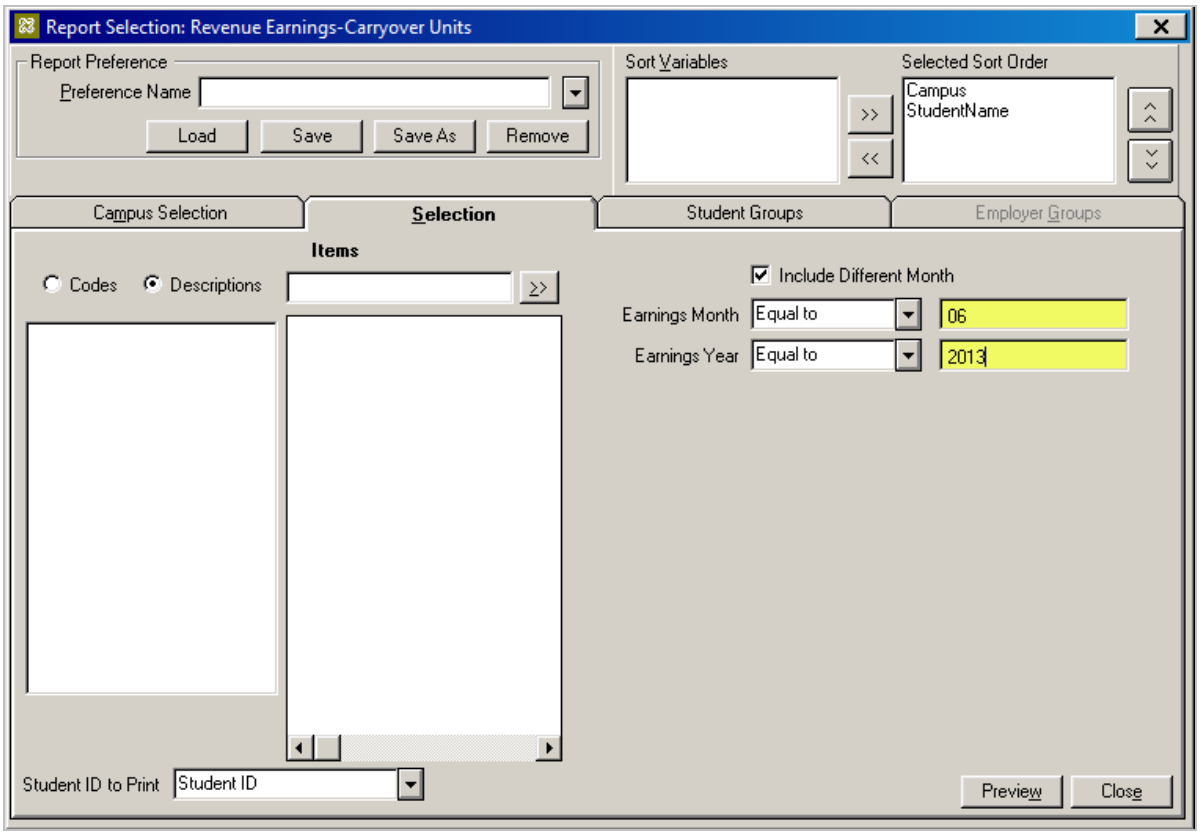
Campus Management
Page 1 of 1

Revenue Earnings - Carryover Units

This report lists students that have Carryover Units who have earned across Academic Years with Attended Hours revenue units. The report displays both the Academic Year where the extra revenue units (attended hours) occurred as well as the Academic Year that received the Carryover Units. For more information please refer to Example of Revenue Recognition with Billed by Academic Year and Earned by Attended Hours section of the Revenue Recognition Help topic.

To run the report:

1. Navigate to **Reports > Student Accounts > Revenue Earnings - Carryover Units**. The Report Selection: Revenue Earnings - Carryover Units form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab. Clear the **Include Different Month** check box to gather only students who had earned Carryover Units in the selected month and had transitioned from one Academic Year to the next Academic Year in the same month. Select this check box to also include students who had earned Carryover Units in the selected month but the transition from on Academic Year to the next occurred in a different month. Specify a month and year in the Earnings Month and Earnings Year text box to gather students who had Carryover Units in that month.



4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Enrollment number

- Enrollment Code
- Campus
- Academic Year – Academic Year sequence
- Bill Code
- Unearned Amount – Total remaining amount to be earned for the Academic Year sequence
- Earned Amount – Total amount earned for the Academic Year Sequence
- Last Earn Date – Date when the revenue was last earned
- Units Earned – Total revenue units earned to date for the Academic Year Sequence
- Transaction Date – Date when revenue is recognized
- Source
- Beginning Balance
- Deferred Amount – New charge(s) amount for the month
- Units Remaining – Units remain to be earned
- Units Earned – This column displays the total units earned for the period including any Carryover Units.
- Earned Amount – Amount earned for the period
- Ending Balance – Remaining amount to be earned
- CarryOver Units – This column displays the extra attended hours carried over from the prior Academic Year.

The report displays students gathered with the specified criteria.

Revenue Earnings - Carryover Units

rpt_SaEnrollRevenueCarryOver.rpt
qle@campusmgmt.com

12/20/2013
3:35:47PM

CarryOver Earnings

'Student Name: 117616, CrossAward
Enrollment: ONLINL5
Enrollment Number: 1113049625
Campus: ONLINE

A/Y	Bill Code	Unearned Amt.	Earned	Last Earn Date	Units Earned
1	TUIT	$0.00	$9,000.00	5/31/2013	900.00

Trans. Date	Source	Beginning Balance	Deferred Amount	Units Remaining	Units Earned	Earned Amount	Ending Balance	CarryOver Units
5/31/2013	Earning	$8,928.30	$0.00	0.00	892.83	$8928.30	$0.00	0.00

A/Y	Bill Code	Unearned Amt.	Earned	Last Earn Date	Units Earned
2	TUIT	$9,000.00	$0.00	6/30/2013	0.00

Trans. Date	Source	Beginning Balance	Deferred Amount	Units Remaining	Units Earned	Earned Amount	Ending Balance	CarryOver Units
6/30/2013	Billing	$0.00	$9,000.00	0.00	0.00	$0.00	$9,000.00	
6/30/2013	Earning	$9,000.00	$0.00	0.00	0.00	$0.00	$9,000.00	136.55

'Student Name: Belle, Dara M
Enrollment: ONLINL5
Enrollment Number: BE13090232
Campus: ONLINE

A/Y	Bill Code	Unearned Amt.	Earned	Last Earn Date	Units Earned
1	TUIT	$0.00	$8,500.00	5/31/2013	900.00

Trans. Date	Source	Beginning Balance	Deferred Amount	Units Remaining	Units Earned	Earned Amount	Ending Balance	CarryOver Units
5/31/2013	Earning	$8,432.28	$0.00	0.00	892.83	$8432.28	$0.00	0.00

A/Y	Bill Code	Unearned Amt.	Earned	Last Earn Date	Units Earned
2	TUIT	$7,775.42	$724.58	6/30/2013	76.72

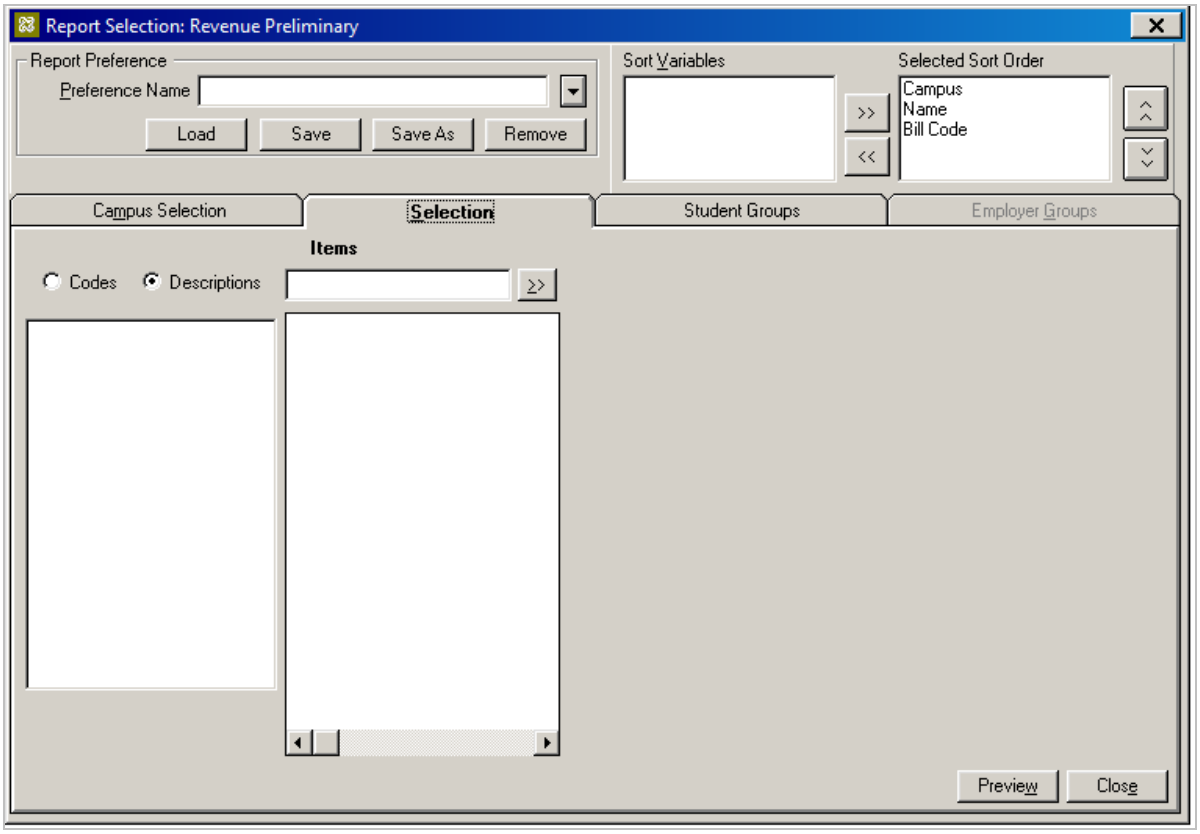
Trans. Date	Source	Beginning Balance	Deferred Amount	Units Remaining	Units Earned	Earned Amount	Ending Balance	CarryOver Units
6/30/2013	Billing	$0.00	$8,500.00	0.00	0.00	$0.00	$8,500.00	
6/30/2013	Earning	$8,500.00	$0.00	823.28	76.72	$724.58	$7,775.42	59.85

Revenue Preliminary

This report lists preliminary revenue data.

To run the report:

1. Navigate to **Reports > Student Accounts > Revenue Preliminary**. The Report Selection: Revenue Preliminary form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

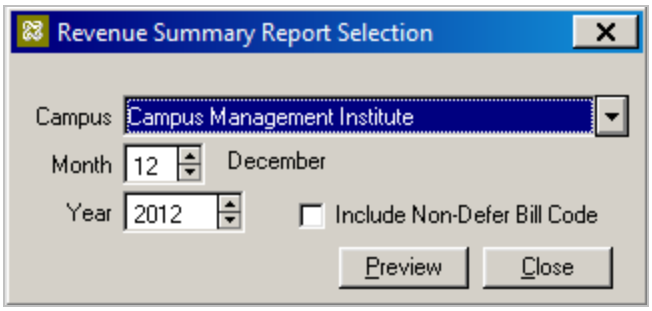
Revenue Summary

This report provides a revenue summary as of a specified date.

Note: Manually deferred adjustments are not updated with a status on this report.

To run the report:

1. Navigate to **Reports > Student Accounts > Revenue Summary**. The Revenue Summary Report Selection form is displayed.
2. Select the Campus, Month, and Year. If applicable, select the check box to 'Include Non-Defer Bill Code'.



3. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

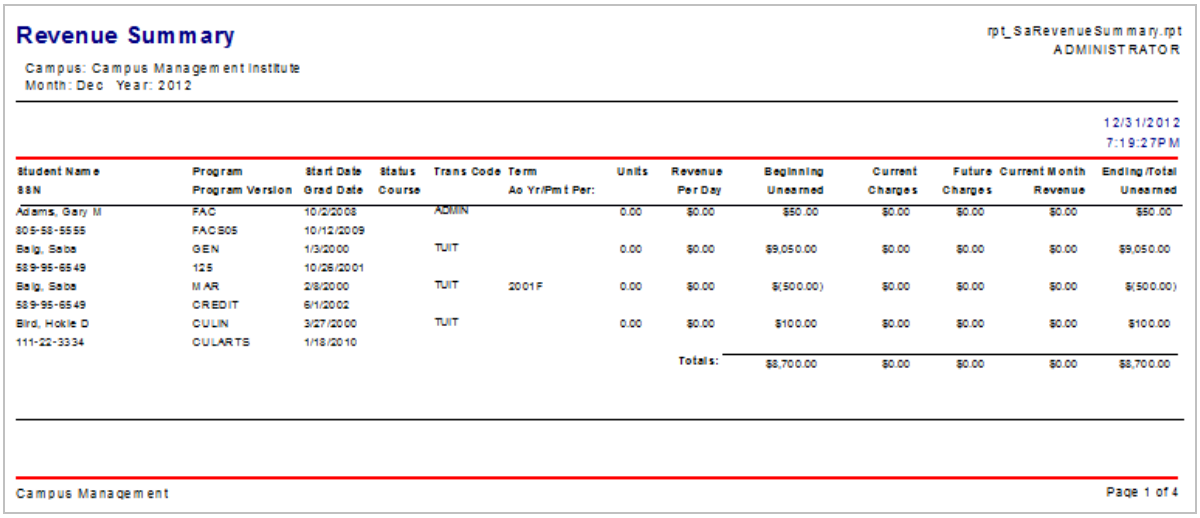
   - Student Name
   - SSN
   - Program
   - Program Version
   - Start Date
   - Graduation Date
   - Status
   - Course
   - Trans Code
   - Term
   - Academic Year/Payment Period
   - Units
   - Revenue Per Day
   - Beginning Unearned
   - Current Charges
   - Future Charges
   - Current Month Revenue
   - Ending/Total Unearned

   Lines appear on the report if non-zero amounts appear in Beginning Unearned, Current Charges, or Current Month Revenue. Future Charges come from Program Fees not yet billed. Grand totals are provided for the amount columns.

   The following cross-tabulation is provided at the end of the report:

   - Current Revenue by Status/Program
   - Transaction Code

- Billing Code/Program



Revenue Summary

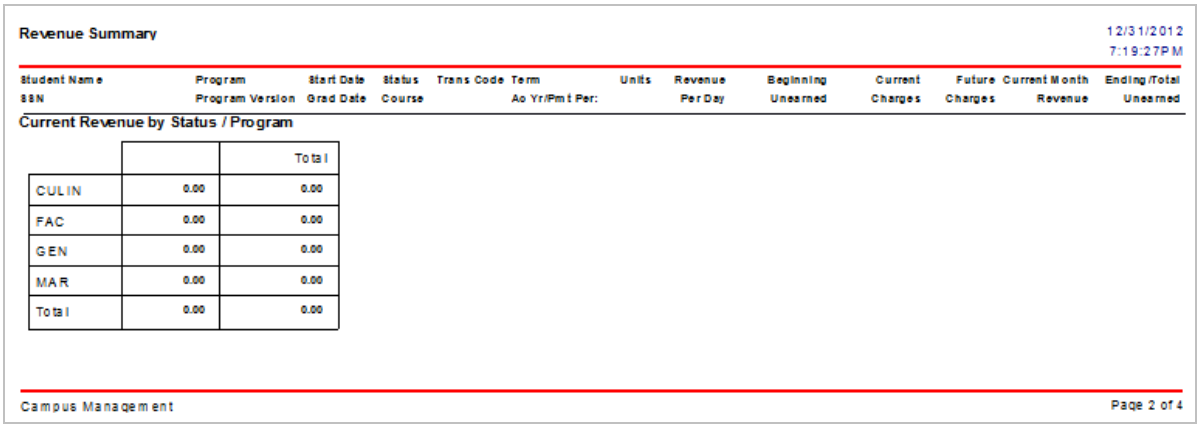
rpt_SaRevenueSummary.rpt
ADMINISTRATOR

Campus: Campus Management Institute
Month: Dec Year: 2012

12/31/2012
7:19:27PM

Student Name / SSN	Program / Program Version	Start Date / Grad Date	Status / Course	Trans Code	Term / Ao Yr/Prnt Per:	Units	Revenue Per Day	Beginning Unearned	Current Charges	Future Charges	Current Month Revenue	Ending/Total Unearned
Adams, Gary M	FAC	10/2/2008		ADMIN		0.00	$0.00	$50.00	$0.00	$0.00	$0.00	$50.00
805-58-5555	FACS05	10/12/2009										
Baig, Saba	GEN	1/3/2000		TUIT		0.00	$0.00	$9,050.00	$0.00	$0.00	$0.00	$9,050.00
589-95-6549	125	10/26/2001										
Baig, Saba	MAR	2/8/2000		TUIT	2001F	0.00	$0.00	$(500.00)	$0.00	$0.00	$0.00	$(500.00)
589-95-6549	CREDIT	6/1/2002										
Bird, Hokie D	CULIN	3/27/2000		TUIT		0.00	$0.00	$100.00	$0.00	$0.00	$0.00	$100.00
111-22-3334	CULARTS	1/18/2010										
							Totals:	$8,700.00	$0.00	$0.00	$0.00	$8,700.00

Campus Management
Page 1 of 4



Revenue Summary

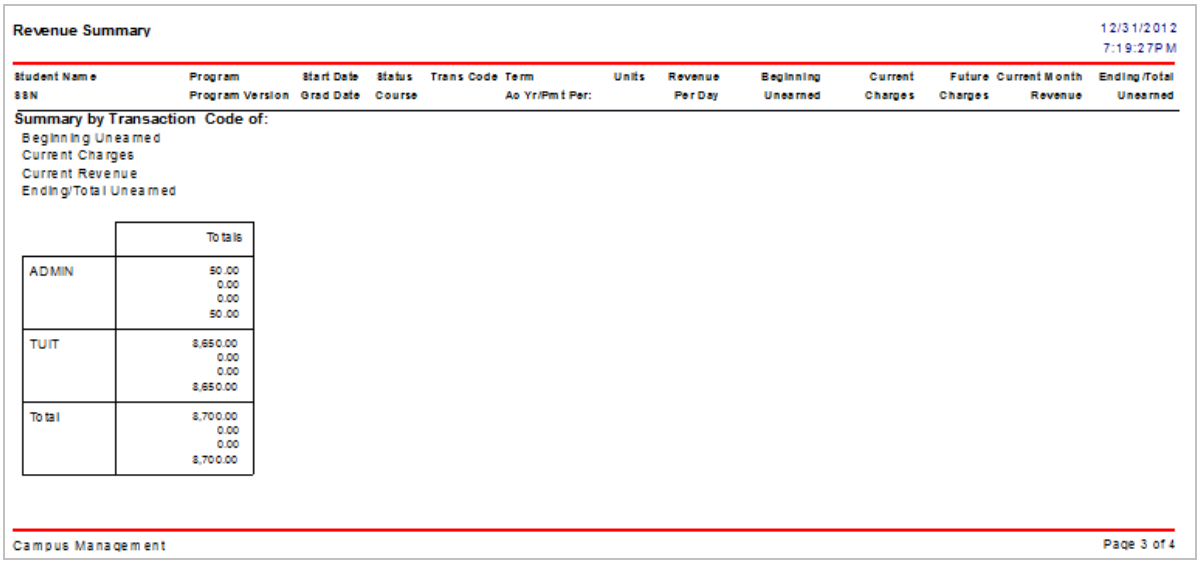
12/31/2012
7:19:27PM

Student Name / SSN	Program / Program Version	Start Date / Grad Date	Status / Course	Trans Code	Term / Ao Yr/Prnt Per:	Units	Revenue Per Day	Beginning Unearned	Current Charges	Future Charges	Current Month Revenue	Ending/Total Unearned

Current Revenue by Status / Program

		Total
CULIN	0.00	0.00
FAC	0.00	0.00
GEN	0.00	0.00
MAR	0.00	0.00
Total	0.00	0.00

Campus Management
Page 2 of 4



Revenue Summary

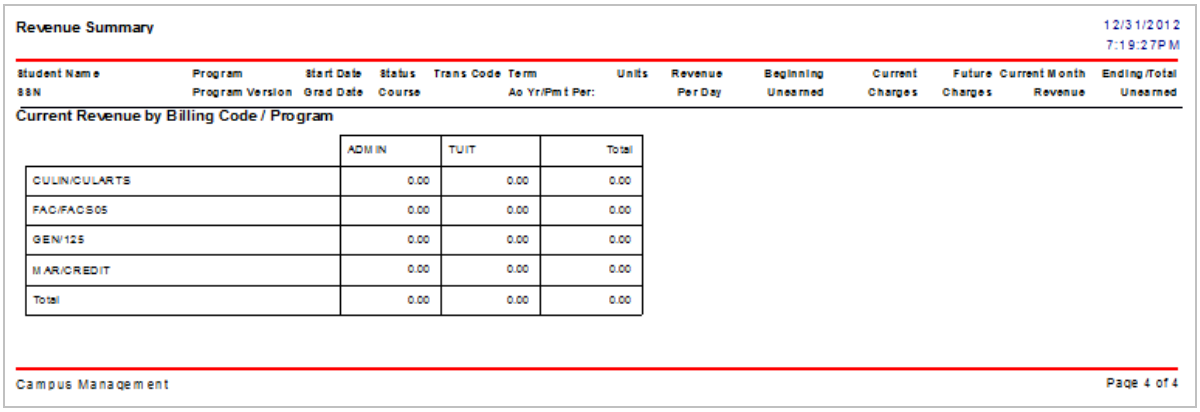
12/31/2012
7:19:27PM

Student Name / SSN	Program / Program Version	Start Date / Grad Date	Status / Course	Trans Code	Term / Ao Yr/Prnt Per:	Units	Revenue Per Day	Beginning Unearned	Current Charges	Future Charges	Current Month Revenue	Ending/Total Unearned

Summary by Transaction Code of:
Beginning Unearned
Current Charges
Current Revenue
Ending/Total Unearned

	Totals
ADMIN	50.00 0.00 0.00 50.00
TUIT	8,650.00 0.00 0.00 8,650.00
Total	8,700.00 0.00 0.00 8,700.00

Campus Management
Page 3 of 4



Revenue Summary 12/31/2012 7:19:27PM

Student Name / SSN	Program / Program Version	Start Date / Grad Date	Status / Course	Trans Code	Term / Ac Yr/Prnt Per:	Units	Revenue Per Day	Beginning Unearned	Current Charges	Future Charges	Current Month Revenue	Ending/Total Unearned

Current Revenue by Billing Code / Program

	ADMIN	TUIT	Total
CULIN/CULARTS	0.00	0.00	0.00
FAC/FACS05	0.00	0.00	0.00
GEN/125	0.00	0.00	0.00
MAR/CREDIT	0.00	0.00	0.00
Total	0.00	0.00	0.00

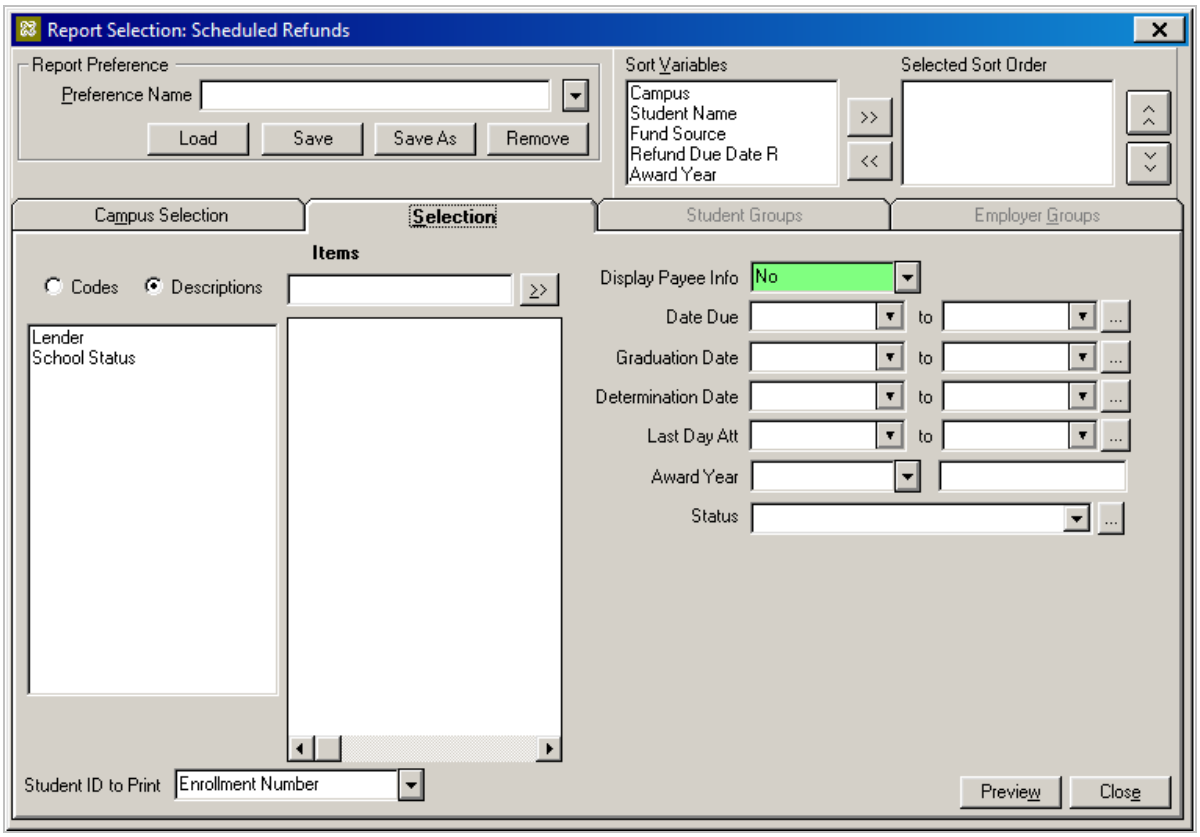
Campus Management Page 4 of 4

Scheduled Refunds

This report displays refund checks scheduled to be printed. It provides an easy way for you to make sure all refunds are being made in a timely manner. The status (of the refund) can be Posted, Not Posted, and/or Void.

To run the report:

1. Navigate to **Reports > Student Accounts > Scheduled Refunds**. The Report Selection: Scheduled Refunds form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



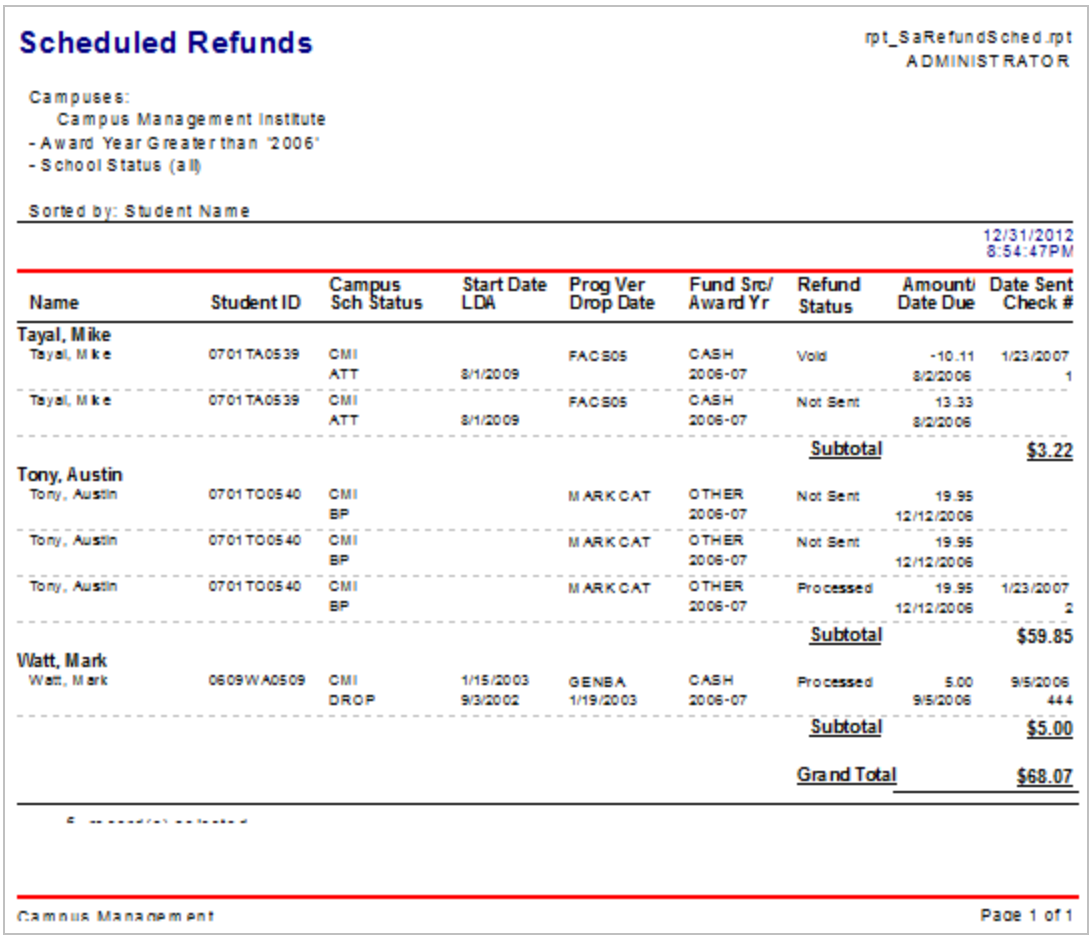
4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Student ID
   - Campus Code
   - School Status
   - Start Date
   - LDA
   - Program Version
   - Drop Date
   - Fund Source/Award Year

- Refund Status
- Refund Amount Due
- Due Date
- Date Sent
- Check #

The amount of a voided refund is listed as a negative value to be subtracted from the report totals.



Scheduled Refunds

rpt_SaRefundSched.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- Award Year Greater than '2006'
- School Status (all)

Sorted by: Student Name

12/31/2012
8:54:47PM

Name	Student ID	Campus Sch Status	Start Date LDA	Prog Ver Drop Date	Fund Src/ Award Yr	Refund Status	Amount Date Due	Date Sent Check #
Tayal, Mike								
Tayal, Mike	0701TA0539	CMI ATT	 8/1/2009	FACS05	CASH 2006-07	Void	-10.11 8/2/2006	1/23/2007 1
Tayal, Mike	0701TA0539	CMI ATT	 8/1/2009	FACS05	CASH 2006-07	Not Sent	13.33 8/2/2006	
						Subtotal		$3.22
Tony, Austin								
Tony, Austin	0701TO0540	CMI BP		MARKCAT	OTHER 2006-07	Not Sent	19.95 12/12/2006	
Tony, Austin	0701TO0540	CMI BP		MARKCAT	OTHER 2006-07	Not Sent	19.95 12/12/2006	
Tony, Austin	0701TO0540	CMI BP		MARKCAT	OTHER 2006-07	Processed	19.95 12/12/2006	1/23/2007 2
						Subtotal		$59.85
Watt, Mark								
Watt, Mark	0609WA0509	CMI DROP	1/15/2003 9/3/2002	GENBA 1/19/2003	CASH 2006-07	Processed	5.00 9/5/2006	9/5/2006 444
						Subtotal		$5.00
						Grand Total		$68.07

Campus Management

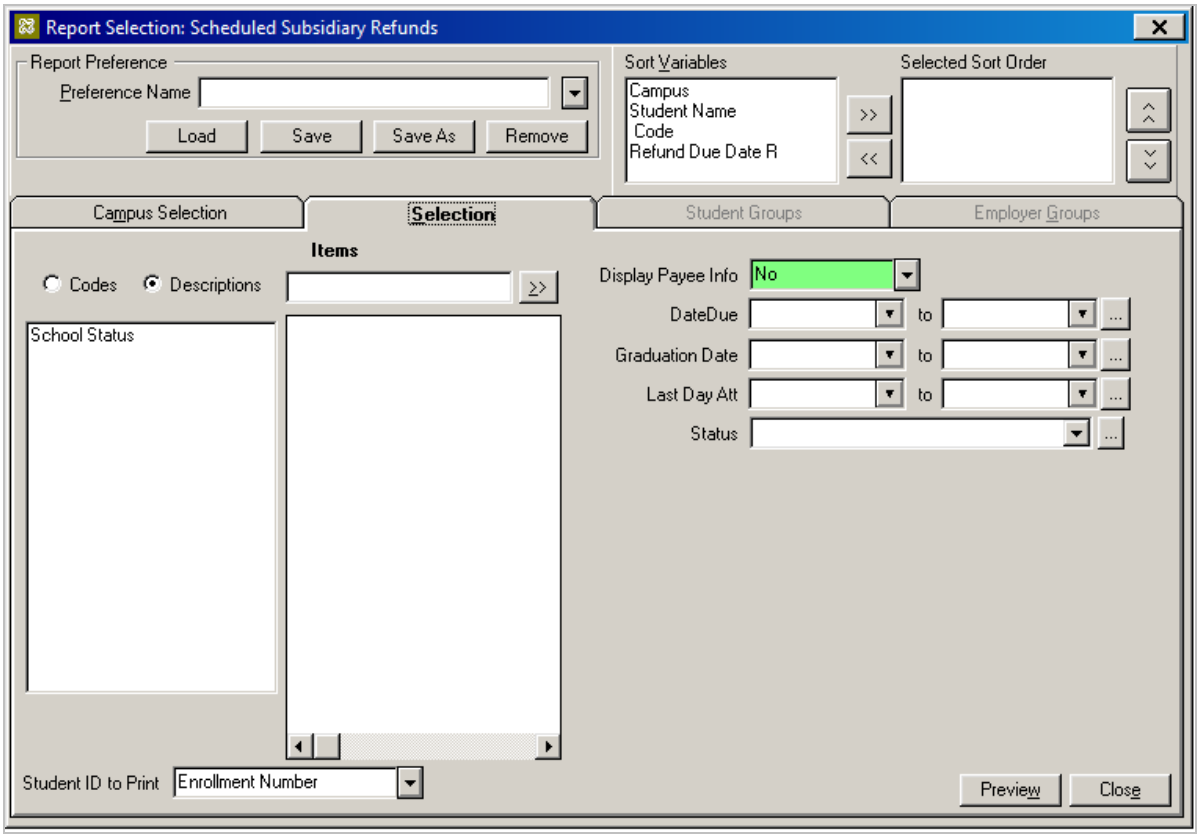
Page 1 of 1

Scheduled Subsidiary Refunds

This report displays scheduled subsidiary refunds.

To run the report:

1. Navigate to **Reports > Student Accounts > Scheduled Subsidiary Refunds**. The Report Selection: Scheduled Subsidiary Refunds form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

Scheduled Subsidiary Refunds

rpt_saRefundSubsidiarySched.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- School Status (all)

12/31/2012
7:55:09 PM

Name	Student ID	Campus Sch Status	Start Date LDA	Prog Ver Drop Date	Subsidiary	Refund Status	Amount/ Date Due	Date Sent Check #
Andreu, Frank	0002AN0245	CMI A	1/4/1999	GENBA	NEW	Processed	$10.00 3/11/2009	3/11/2009
Abbott, Victoria A	0807AB0558	CMI LOA	5/1/2006	GENBA	NEW	Processed	$10.00 3/11/2009	3/11/2009
						Grand Total		$20.00

2 record(s) selected

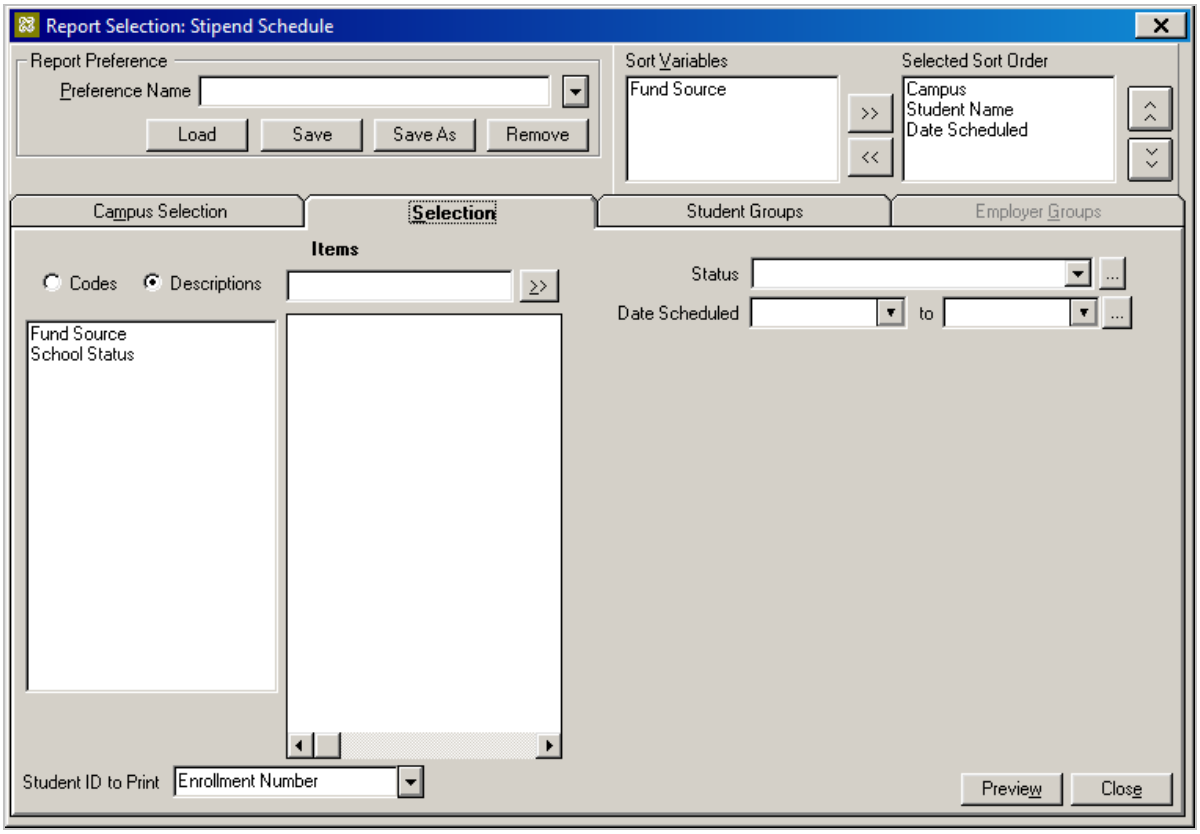
Campus Management
Page 1 of 1

Stipend Schedule

This report lists scheduled payments to students by the school.

To run the report:

1. Navigate to **Reports > Student Accounts > Stipend Schedule**. The Report Selection: Stipend Schedule form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

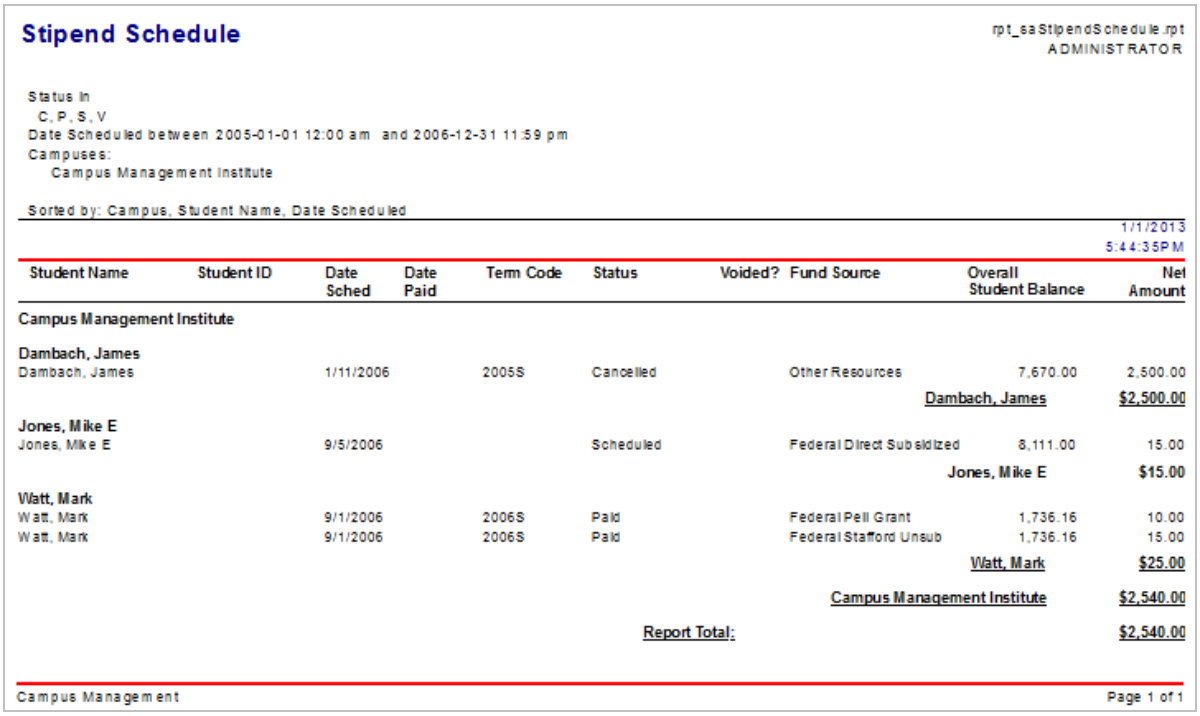
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Student ID
   - Date Scheduled
   - Date Paid
   - Term Code
   - Status

- Voided?
- Fund Source
- Overall Student Balance
- Net Amount

Totals are provided at the student and campus levels.



Stipend Schedule

rpt_saStipendSchedule.rpt
ADMINISTRATOR

Status In
C, P, S, V
Date Scheduled between 2005-01-01 12:00 am and 2006-12-31 11:59 pm
Campuses:
Campus Management Institute

Sorted by: Campus, Student Name, Date Scheduled

1/1/2013
5:44:35PM

Student Name	Student ID	Date Sched	Date Paid	Term Code	Status	Voided?	Fund Source	Overall Student Balance	Net Amount
Campus Management Institute									
Dambach, James									
Dambach, James		1/11/2006		2005S	Cancelled		Other Resources	7,670.00	2,500.00
								Dambach, James	**$2,500.00**
Jones, Mike E									
Jones, Mike E		9/5/2006			Scheduled		Federal Direct Subsidized	8,111.00	15.00
								Jones, Mike E	**$15.00**
Watt, Mark									
Watt, Mark		9/1/2006		2006S	Paid		Federal Pell Grant	1,736.16	10.00
Watt, Mark		9/1/2006		2006S	Paid		Federal Stafford Unsub	1,736.16	15.00
								Watt, Mark	**$25.00**
								Campus Management Institute	**$2,540.00**
					Report Total:				**$2,540.00**

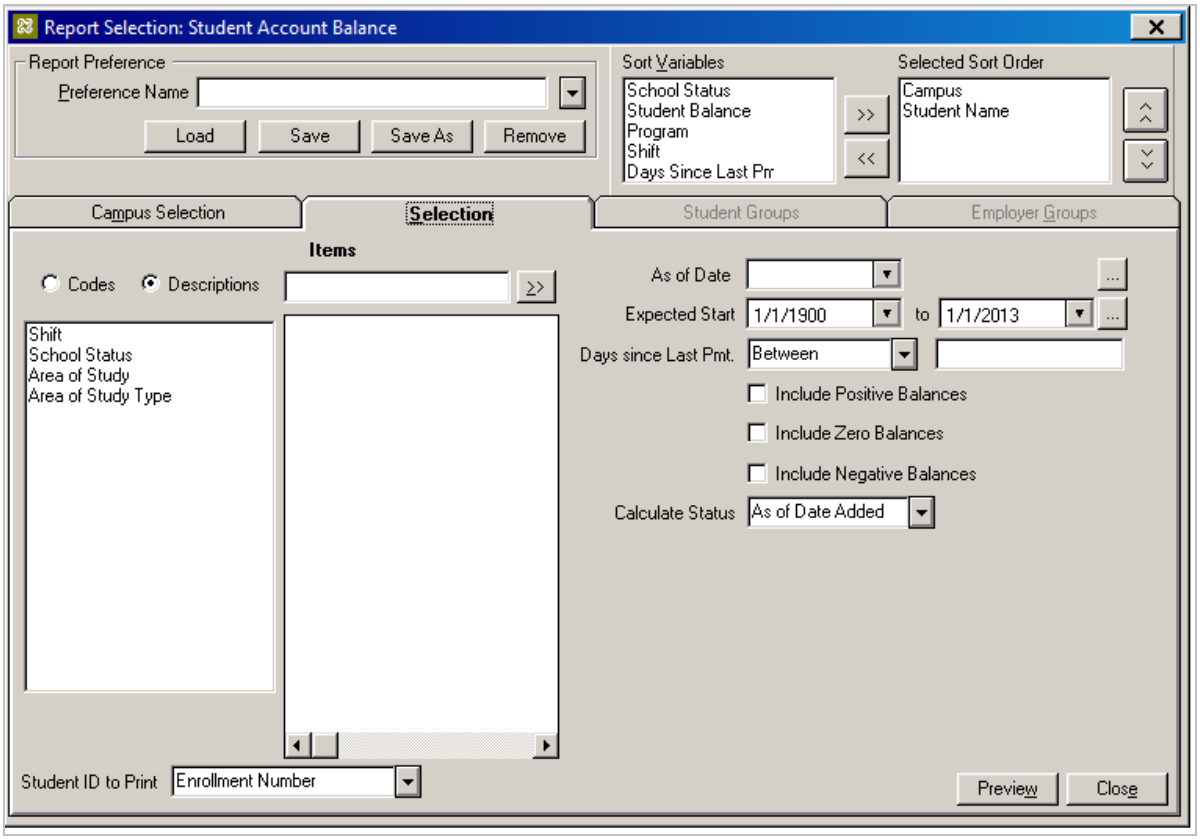
Campus Management — Page 1 of 1

Student Account Balance

This report displays the account balances for students that are enrolled in a program.

To run the report:

1. Navigate to **Reports > Student Accounts > Student Account Balance**. The Report Selection: Student Account Balance form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

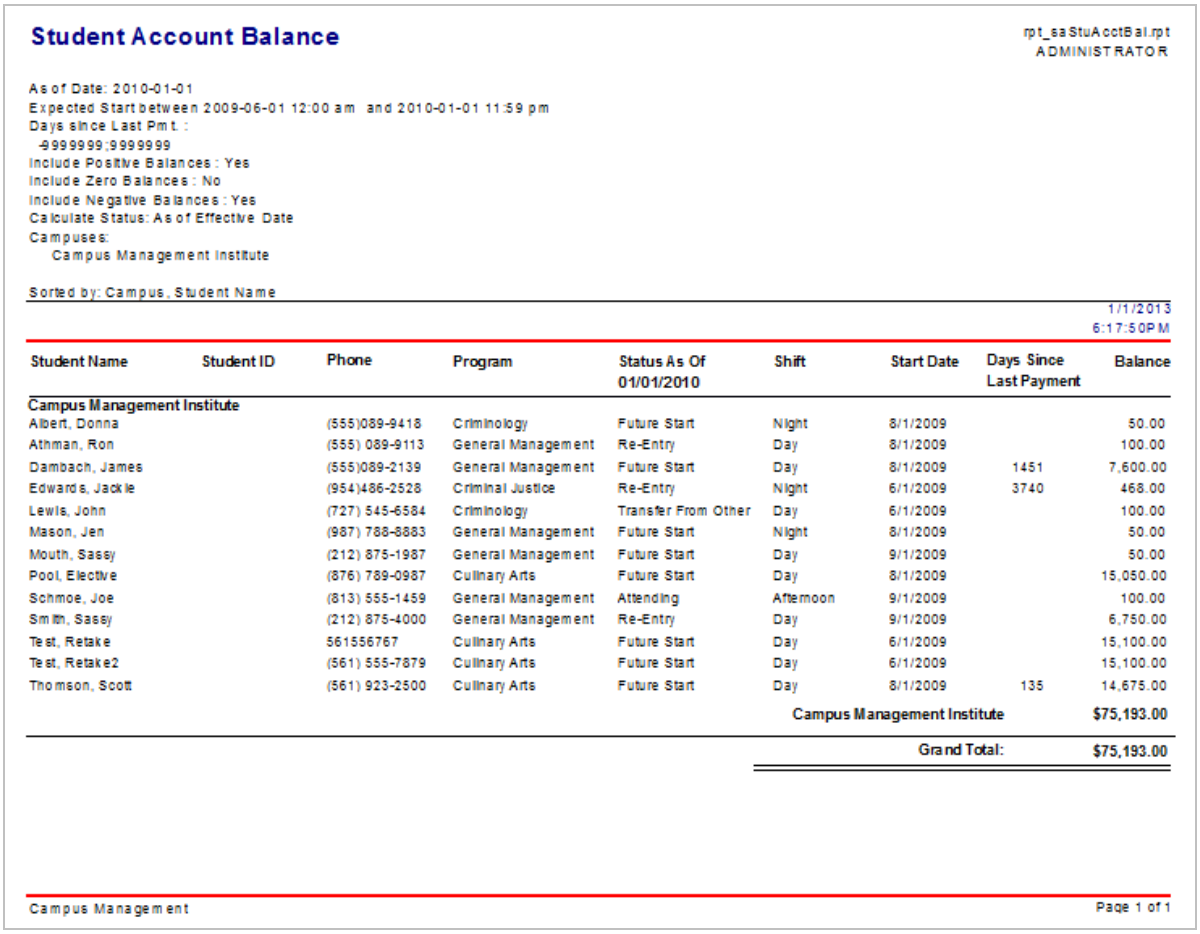


4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Student ID
   - Phone Number
   - Program Versions
   - School Status (based on calculate status)
   - Shift
   - Start Date
   - Days Since Last Payment
   - Balance

A total of the amount field is provided at the campus and report levels.



Student Account Balance

rpt_saStuAcctBal.rpt
ADMINISTRATOR

As of Date: 2010-01-01
Expected Start between 2009-06-01 12:00 am and 2010-01-01 11:59 pm
Days since Last Pmt. :
-9999999;9999999
Include Positive Balances : Yes
Include Zero Balances : No
Include Negative Balances : Yes
Calculate Status: As of Effective Date
Campuses:
Campus Management Institute

Sorted by: Campus, Student Name

1/1/2013
6:17:50 PM

Student Name	Student ID	Phone	Program	Status As Of 01/01/2010	Shift	Start Date	Days Since Last Payment	Balance
Campus Management Institute								
Albert, Donna		(555)089-9418	Criminology	Future Start	Night	8/1/2009		50.00
Athman, Ron		(555) 089-9113	General Management	Re-Entry	Day	8/1/2009		100.00
Dambach, James		(555)089-2139	General Management	Future Start	Day	8/1/2009	1451	7,600.00
Edwards, Jackie		(954)486-2528	Criminal Justice	Re-Entry	Night	6/1/2009	3740	468.00
Lewis, John		(727) 545-6584	Criminology	Transfer From Other	Day	6/1/2009		100.00
Mason, Jen		(987) 788-8883	General Management	Future Start	Night	8/1/2009		50.00
Mouth, Sassy		(212) 875-1987	General Management	Future Start	Day	9/1/2009		50.00
Pool, Elective		(876) 789-0987	Culinary Arts	Future Start	Day	8/1/2009		15,050.00
Schmoe, Joe		(813) 555-1459	General Management	Attending	Afternoon	9/1/2009		100.00
Smith, Sassy		(212) 875-4000	General Management	Re-Entry	Day	9/1/2009		6,750.00
Test, Retake		561556767	Culinary Arts	Future Start	Day	6/1/2009		15,100.00
Test, Retake2		(561) 555-7879	Culinary Arts	Future Start	Day	6/1/2009		15,100.00
Thomson, Scott		(561) 923-2500	Culinary Arts	Future Start	Day	8/1/2009	135	14,675.00
						Campus Management Institute		**$75,193.00**
						Grand Total:		**$75,193.00**

Campus Management

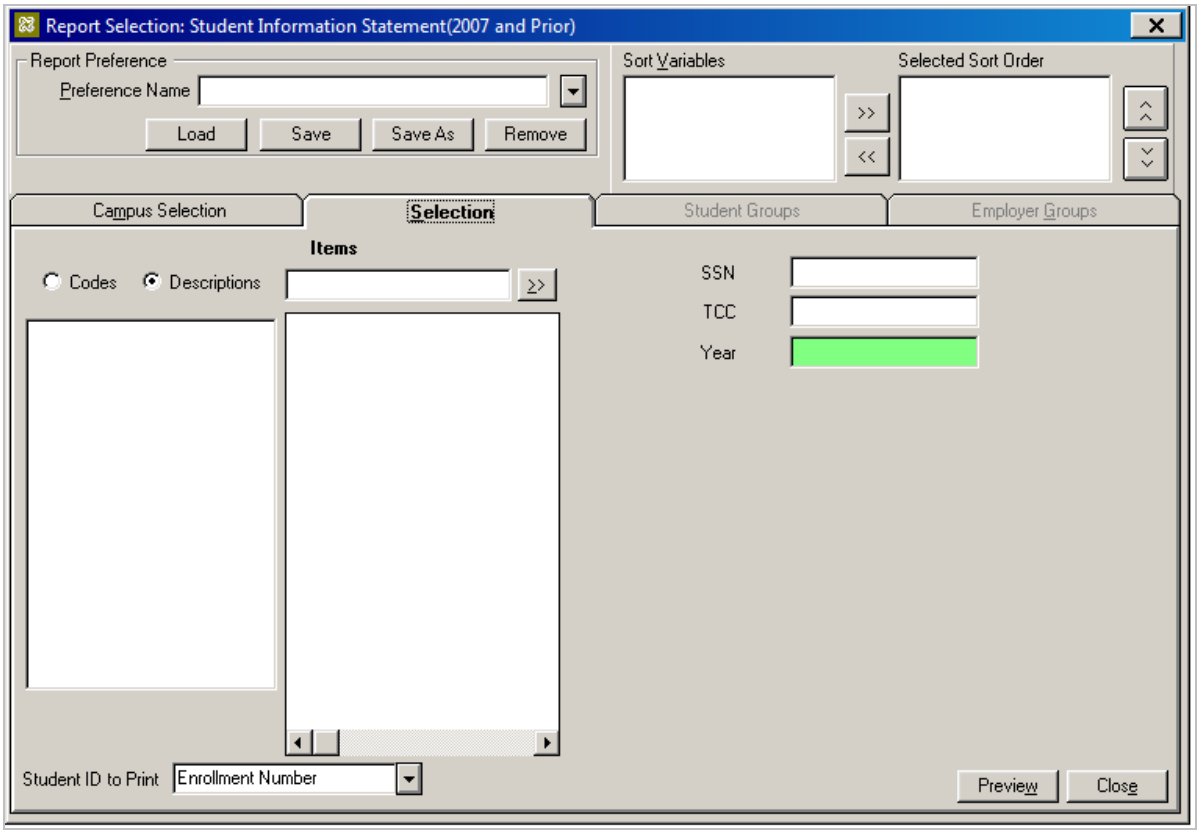
Page 1 of 1

Student Information Statement (2007 and Prior)

This report provides 1098-T information sheets for enrolled students.

To run the report:

1. Navigate to **Reports > Student Accounts > Student Information Statement (2007 and Prior)**. The Report Selection: Student Information Statement (2007 and Prior) form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

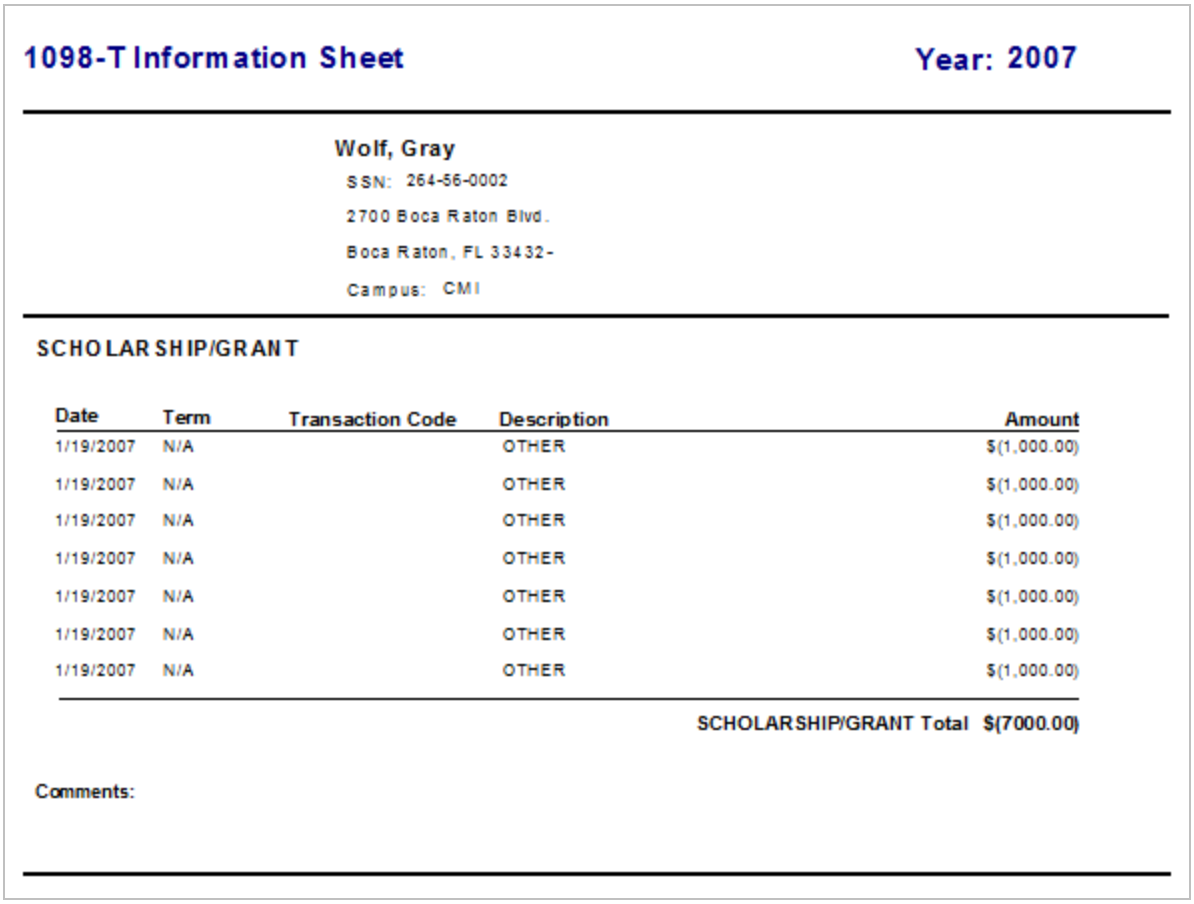


4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name and Address
   - Date
   - Term
   - Transaction Code
   - Description
   - Scholarship/Grant Amount
   - Comments

A total of the amount field is provided at the student levels.



1098-T Information Sheet **Year: 2007**

Wolf, Gray
SSN: 264-56-0002
2700 Boca Raton Blvd.
Boca Raton, FL 33432-
Campus: CMI

SCHOLARSHIP/GRANT

Date	Term	Transaction Code	Description	Amount
1/19/2007	N/A		OTHER	$(1,000.00)
1/19/2007	N/A		OTHER	$(1,000.00)
1/19/2007	N/A		OTHER	$(1,000.00)
1/19/2007	N/A		OTHER	$(1,000.00)
1/19/2007	N/A		OTHER	$(1,000.00)
1/19/2007	N/A		OTHER	$(1,000.00)
1/19/2007	N/A		OTHER	$(1,000.00)

SCHOLARSHIP/GRANT Total $(7000.00)

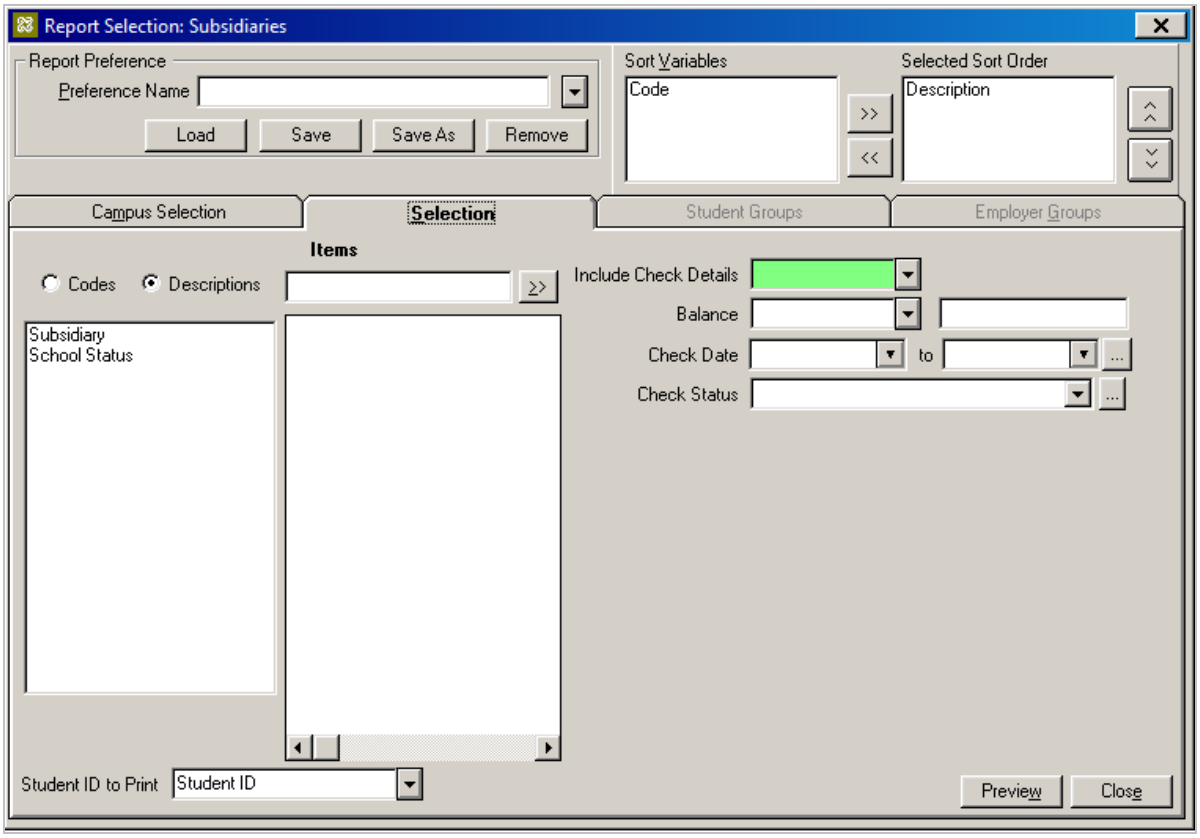
Comments:

Subsidiaries

Student Accounts representatives use this report to search for Subsidiary refund checks.

To run the report:

1. Navigate to **Reports > Student Accounts > Subsidiaries**. The Report Selection: Subsidiaries form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

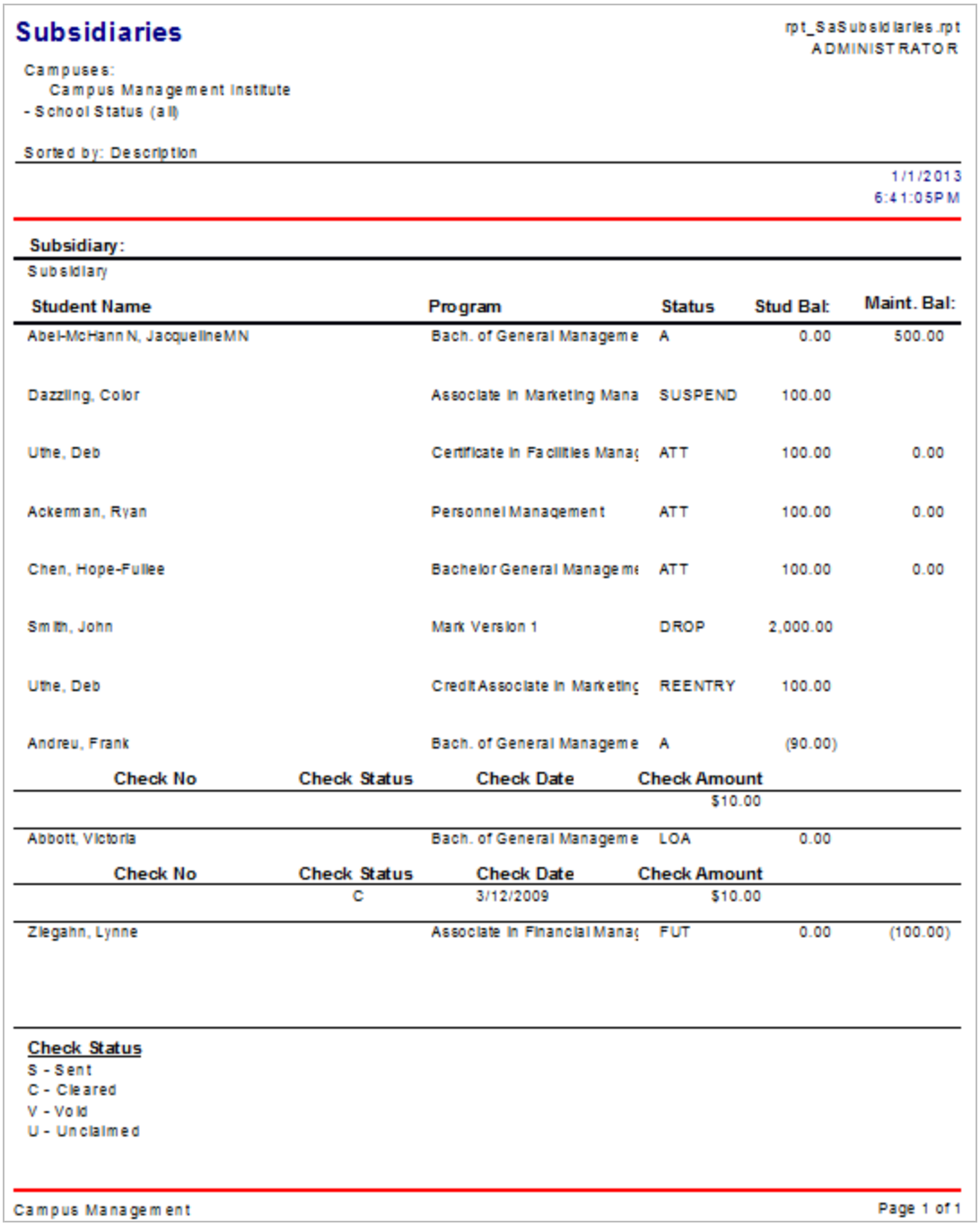


4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Program
   - Status
   - Student Balance

- Maintained Balance



Subsidiaries

rpt_SaSubsidiaries.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- School Status (all)

Sorted by: Description

1/1/2013
6:41:05PM

Subsidiary:

Subsidiary

Student Name	Program	Status	Stud Bal:	Maint. Bal:
Abel-McHann N, JacquelineMN	Bach. of General Manageme	A	0.00	500.00
Dazzling, Color	Associate in Marketing Mana	SUSPEND	100.00	
Uthe, Deb	Certificate in Facilities Manag	ATT	100.00	0.00
Ackerman, Ryan	Personnel Management	ATT	100.00	0.00
Chen, Hope-Fullee	Bachelor General Manageme	ATT	100.00	0.00
Smith, John	Mark Version 1	DROP	2,000.00	
Uthe, Deb	CreditAssociate in Marketing	REENTRY	100.00	
Andreu, Frank	Bach. of General Manageme	A	(90.00)	

Check No	Check Status	Check Date	Check Amount
			$10.00

Abbott, Victoria		Bach. of General Manageme	LOA	0.00

Check No	Check Status	Check Date	Check Amount
	C	3/12/2009	$10.00

Ziegahn, Lynne		Associate in Financial Manag	FUT	0.00 (100.00)

Check Status
S - Sent
C - Cleared
V - Void
U - Unclaimed

Campus Management Page 1 of 1

Title IV Credit Balance

The report calculates all charges identified as Title IV charges and subtracts all payments defined as Title IV payments to determine if there is a credit balance. The report displays a list of students and the detailed transactions that result in the Title IV balance.

When a Title IV credit balance occurs, institutions have 14 days to return the credit balance to the student (or to parent for PLUS loans) unless the institution has obtained authorization to hold credit balances. When the award year has expired, or the loan period has expired, the institution must return the credit balance within 14 days, regardless of whether they have obtained authorization to hold credit balances.

Campuses that are configured to use Auto-Stipends also take into account the time period selected for evaluation. If the time period has not expired, then waivers are acknowledged and used in the calculations.

Filtering the Title IV Credit Balance Wizard or Title IV Credit Balance Report by Loan Period

When a student has only Title IV loans, or a combination of Title IV loans and Title IV grants, the system reports the pay period based on the Loan Period.

The system gathers students who have posted charges and as well as grant and loan disbursements for the specified loan period and considers any refunds or stipends where the student is left with a credit balance. It then generates a report that displays information such as: Student's Campus, Student Name, ID Enroll Status, Description, Program Version, Term Code, Title IV/Institutional Charges, Title IV Payment, Start Date, Grad Date, and Credit Balance.

Filtering the Title IV Credit Balance Wizard or Title IV Credit Balance Report by Award Year

If a student is packaged for only Title IV grants, the system reports the pay period based on the Award Year.

The system gathers students who have posted charges and grant disbursements and considers any refunds or stipends where the student is left with a credit balance associated with an Award Year. It generates a report that displays the Student's Campus, Student Name, ID Enroll Status, Description, Program Version, Term Code, and Title IV / Institutional Charges.

Proration Logic

For any students who are charged up front for multiple payment periods (e.g. for an entire program or academic year), Campus Nexus Student prorates the Title IV funds charges to determine the actual payment period (term / payment period) charges and calculate whether a Title IV Credit Balance has occurred. These credit balances are posted to the student's ledger as stipends and can be used by the student for non-institutional educational expenses in each payment period. This proration enables an institution to remain in compliance with the Department of Education's (ED) Program Integrity and Improvement Rule of October 30, 2015.

The prorated amount of charges associated with a current pay period are determined by:

- If the program has substantially equal payment periods, the program's total institutional charges are divided by the number of payment periods in the program.
- For other programs, the number of credit or clock hours in the current payment period are divided by the total number of credit or clock hours in the program. That result is then multiplied by the total institutional charges for the program.

Term-based students

Term-based students are students who enrolled in a program where the program’s Academic Calendar is one of the following:

- Academic Calendar 1 – Non-standard terms (SE9W – terms substantially equal in length, with each term comprised of 9 or more weeks of instructional time)
- Academic Calendar 2 – Standard terms of quarters
- Academic Calendar 3 – Standard terms of semesters
- Academic Calendar 4 – Standard terms of trimesters

For term-based students who are billed in advance by program, the system prorates the Title IV charges for each term in the current year (loan period or award year being evaluated) by dividing the total Title IV charges for the program by the total number of credits required to complete the program, then multiplying the result by the number of credits registered in the term.

- Prorated Term Charge = (All Title IV charges / # credits required) X Credits registered in the term

For term-based students who are billed in advance by academic year, the system prorated the Title IV charges for the academic year equally among all the terms in the academic year. The system determines the number of terms in an academic year by dividing the credits defined for the academic year by the number of expected credits per term configured at the program version setup.

- Prorated Term Charge = Academic Year's Title IV charges / # of terms in the Academic Year

Note: The use of perpetual terms for disbursing Title IV aid and / or course registration is not supported under this feature since the system must be able to determine the credits registered and the Title IV payments for each term in order to accurately calculate the credit balance. As a result, no proration of Title IV charges will be carried out for these students and the Title IV balance is calculated in the same manner as it is for students who are not billed in advance.

Non-term based students

Non-term based students are students who enrolled in a program where the program's Academic Calendar is one of the following:

- Academic Calendar 5 – Clock Hours
- Academic Calendar 6 – Credit hours without terms

For non-term based students who are billed in advance by Program, the system prorates the Title IV charges for each payment period in the current year by dividing the total Title IV charges for the program by the total number of credits required to complete the program, then multiplying the result by the number of credits defined for the payment period.

- Prorated Payment Period Charge = (All Title IV charge / # of credits or hours required) X credits or hours defined for the payment period

For non-term based students who are billed in advance by academic year, the system prorates the Title IV charges for each payment period in the current year by dividing the Title IV charges for the academic year by the number of credits/hours defined for the academic year, then multiply the result by the number of credits/hours defined for the payment period.

- Prorated Payment Period Charge = (Academic Year's Title IV charges / # of credits or hours defined for the Academic Year) X credits or hours defined for the payment period

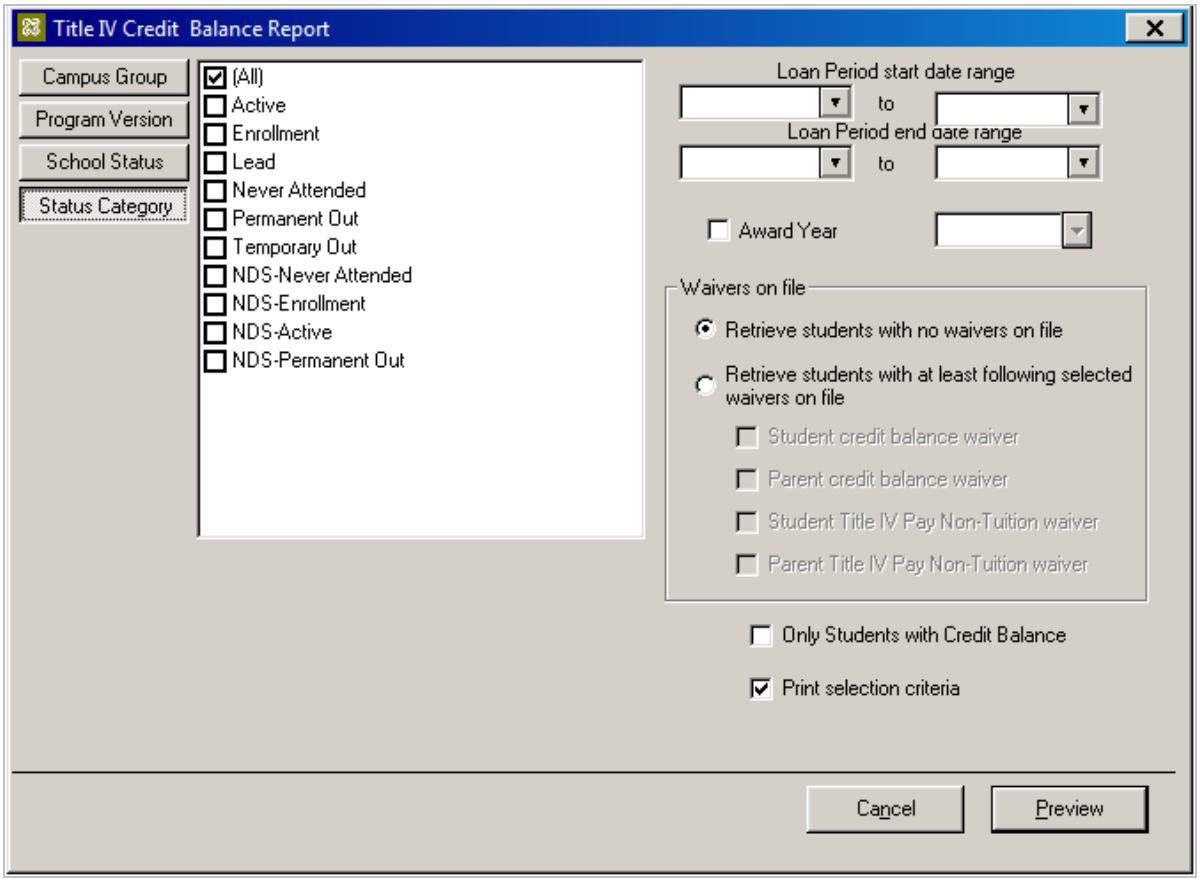
Note: Payment periods are required to prorate Title IV charges and to identify Title IV payments, and to accurately calculate the credit balance for each payment period. No proration of Title IV charges will be carried out for non-term students who are billed in advance if payment periods are not found. As a result, the Title IV balance is calculated in the same manner as it is for students who are not billed in advance.

Non-standard term based not SE9W students

Non-standard term based not SE9W students are awarded Title IV grants based on terms, but are awarded direct loans based on payment periods. The guidance from ED allows schools to evaluate Title IV credit balance for these students based on terms if Title IV grant(s) exists in the current year. Otherwise, the Title IV credit balance evaluation must be done based on payment periods. So if the Title IV grants exist in the current year, the system prorates the Title IV charges using the prorate logic for term-based students. If Title IV grants do not exist in the current year, the system prorates the Title IV charges using the prorate logic for non-term based students.

To run the report:

1. Navigate to **Reports > Student Accounts > Title IV Credit Balance**. The Title IV Credit Balance Report form is displayed.



2. Click **Campus Group** and select appropriate options.
3. Specify the **Loan Period start date range** or select an **Award Year**.
    - For the Loan Period option, the system gathers students who have posted Title IV charges and Direct loan disbursements as well Title IV grant disbursements for the specified loan period. The system considers refunds and stipends in the Title IV balance calculation.
    - For the Award Year option, the system gathers students who have only posted Title IV charges and Title IV grants for the specified award year. The systems considers refunds and stipends in the Title IV balance calculation.

    Fund Source types configured as Title IV Grants are Pell, Perkins, ACG, SMART, TEACH, or SEOG.

    Fund Source types for FFEL or Direct Loans are SUB, UNSUB, PLUS, DIRSUB, DIRUNSUB, and DIRPLUS.
4. Optional: Select additional filter criteria, such as Program Version, School Status, Status Category, Waivers, Students with Credit Balance.
    - You can indicate by enrollment if the student has signed a waiver allowing the institution to retain the credit balances.
    - You can choose to include only students without a credit balance waiver on file, to include only students with a waiver on file, or to include students with credit balances regardless of the waiver status.
    - You can choose to include students with at least one of the following selected waivers on file:

- Student credit balance waiver
- Parent credit balance waiver
- Student Title IV Pay Non-Tuition waiver
- Parent Title IV Pay Non-Tuition waiver

See Credit Balance Waiver.

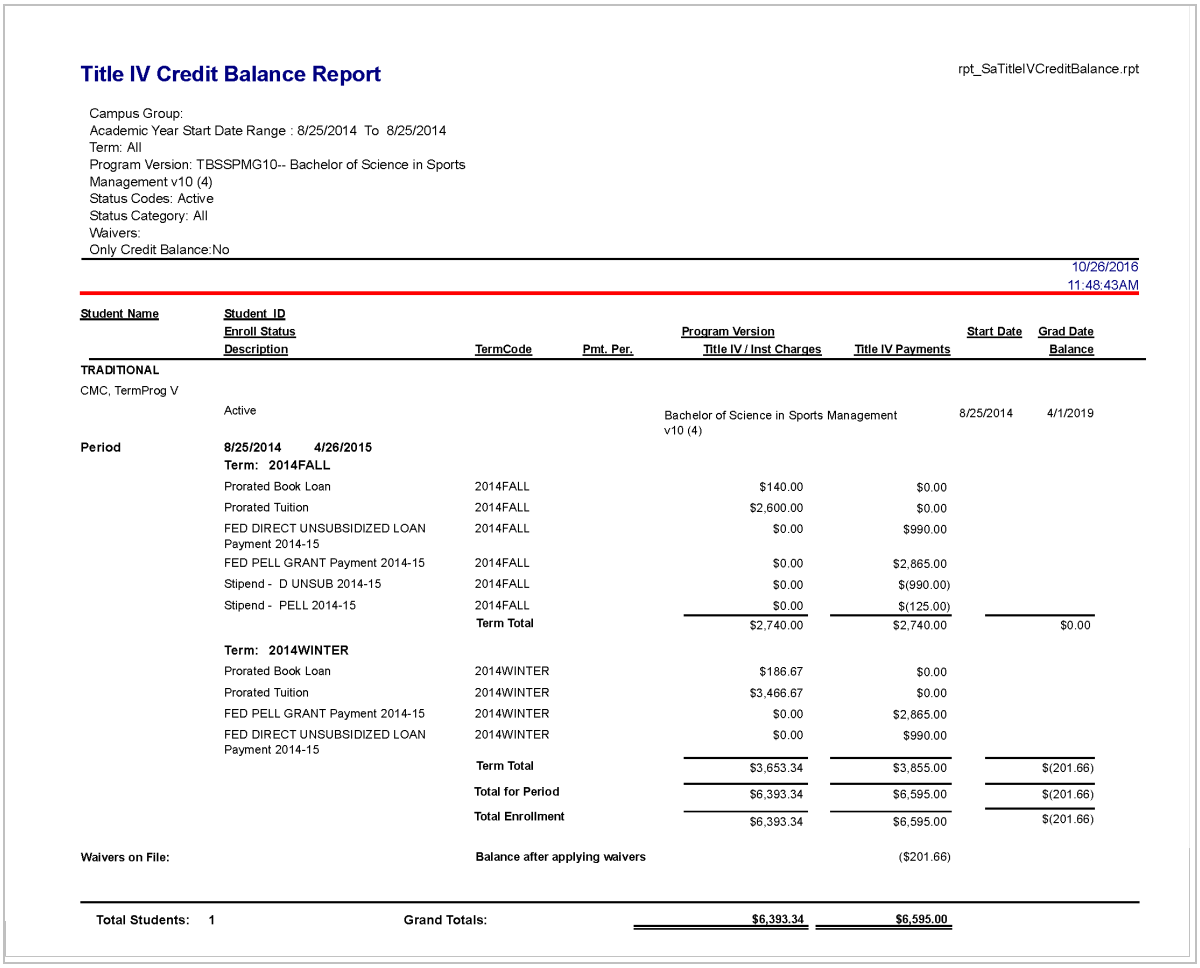
- You can choose to include only students with a credit balance or to include all students.
- You can have the program list the selection criteria on the report.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Campus
   - Student Name
   - Student ID (Social Security Number)
   - Enrollment Status
   - Program Version
   - Start Date
   - Graduation Date
   - Waiver on File Indicator
   - Description
   - Title IV Charges
   - Title IV Payments
   - Balance

   Totals are provided by enrollment and student with a grand total at the end of the report.



Title IV Credit Balance Report rpt_SaTitleIVCreditBalance.rpt

Campus Group:
Academic Year Start Date Range : 8/25/2014 To 8/25/2014
Term: All
Program Version: TBSSPMG10-- Bachelor of Science in Sports Management v10 (4)
Status Codes: Active
Status Category: All
Waivers:
Only Credit Balance:No

10/26/2016 11:48:43AM

Student Name / Enroll Status / Description	Student ID / TermCode	Pmt. Per.	Program Version / Title IV / Inst Charges	Title IV Payments	Start Date	Grad Date / Balance
TRADITIONAL						
CMC, TermProg V						
Active			Bachelor of Science in Sports Management v10 (4)		8/25/2014	4/1/2019
Period **8/25/2014 4/26/2015**						
Term: 2014FALL						
Prorated Book Loan	2014FALL		$140.00	$0.00		
Prorated Tuition	2014FALL		$2,600.00	$0.00		
FED DIRECT UNSUBSIDIZED LOAN Payment 2014-15	2014FALL		$0.00	$990.00		
FED PELL GRANT Payment 2014-15	2014FALL		$0.00	$2,865.00		
Stipend - D UNSUB 2014-15	2014FALL		$0.00	$(990.00)		
Stipend - PELL 2014-15	2014FALL		$0.00	$(125.00)		
	Term Total		$2,740.00	$2,740.00		$0.00
Term: 2014WINTER						
Prorated Book Loan	2014WINTER		$186.67	$0.00		
Prorated Tuition	2014WINTER		$3,466.67	$0.00		
FED PELL GRANT Payment 2014-15	2014WINTER		$0.00	$2,865.00		
FED DIRECT UNSUBSIDIZED LOAN Payment 2014-15	2014WINTER		$0.00	$990.00		
	Term Total		$3,653.34	$3,855.00		$(201.66)
	Total for Period		$6,393.34	$6,595.00		$(201.66)
	Total Enrollment		$6,393.34	$6,595.00		$(201.66)
Waivers on File:	**Balance after applying waivers**			($201.66)		
Total Students: 1	**Grand Totals:**		$6,393.34	$6,595.00		

Credit Balance Waiver

Lists > Contact Manager > Documents

To run the Title IV Credit Balances Report for students with credit balance waivers on file, you must set up a Credit Balance Waiver Document.

Navigate to **Setup** > **Campus Locations** > **Campuses** > **Campus Information** > Financial Aid

You must select that document as the credit balance waiver in the campus financial aid setup.

Navigate to **View** > **Contact Manager** > Documents

Add the credit balance document to a specific enrollment, not to 'All Enrollments'.

To appear on the Title IV Credit Balance Report as a student with a waiver on file:

- A document must be selected as the Title IV Credit Balance Waiver on the Financial Aid tab of the campus setup form.
- The document must be related to a specific student enrollment.
- In the document tracking folder, the Document Status for the Title IV Credit Balance document must be On File.
- The Date Expires field for the document on file must be null or later than the current date.

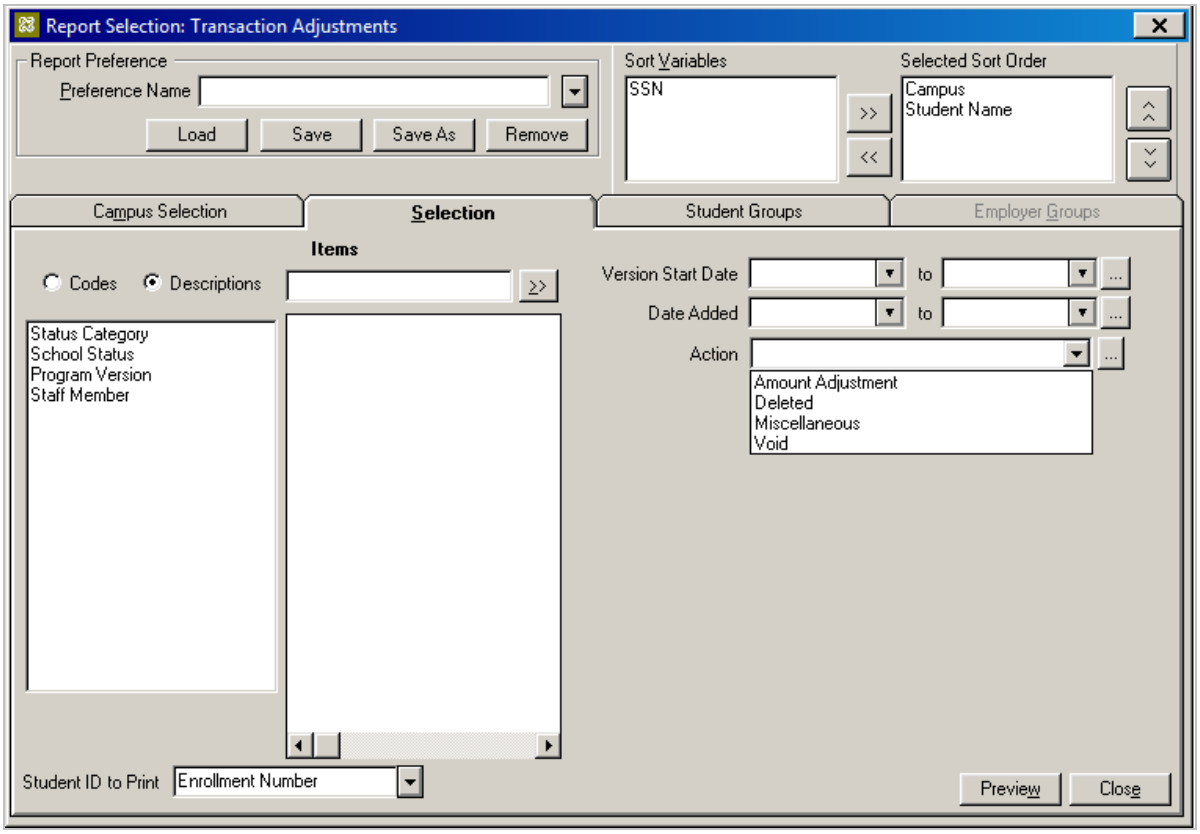
All students who do not meet the above requirements are considered to not have a waiver on file with your institution.

Transaction Adjustments

This report lists the data included under View > Student Accounts > Ledger Cards > Adjustments.

To run the report:

1. Navigate to **Reports > Student Accounts > Transaction Adjustments**. The Report Selection: Transaction Adjustments form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

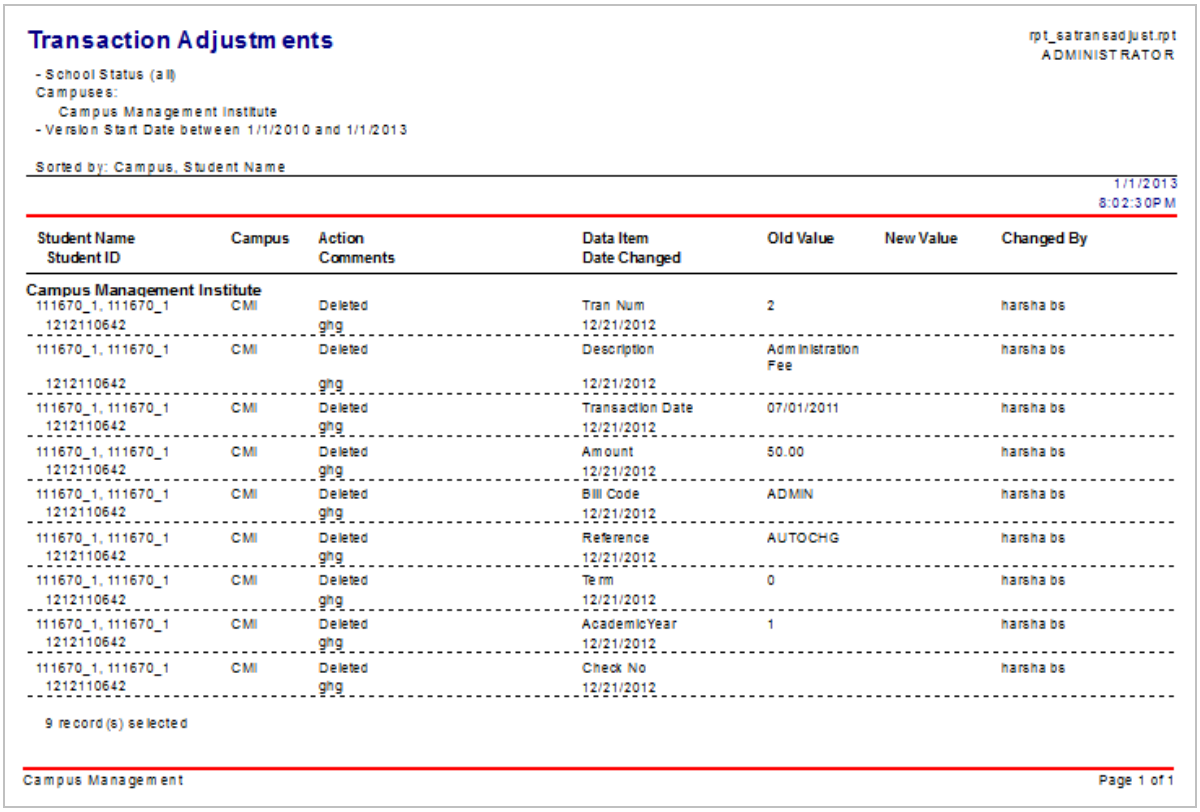


4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Student ID
   - Campus
   - Action
   - Comments
   - Data Item
   - Date Changed
   - Old Value
   - New Value

- Changed By (user name)



Transaction Adjustments

rpt_satransadjust.rpt
ADMINISTRATOR

- School Status (all)
Campuses:
Campus Management Institute
- Version Start Date between 1/1/2010 and 1/1/2013

Sorted by: Campus, Student Name

1/1/2013
8:02:30PM

Student Name Student ID	Campus	Action Comments	Data Item Date Changed	Old Value	New Value	Changed By
Campus Management Institute						
111670_1, 111670_1 1212110642	CMI	Deleted ghg	Tran Num 12/21/2012	2		harsha bs
111670_1, 111670_1 1212110642	CMI	Deleted ghg	Description 12/21/2012	Administration Fee		harsha bs
111670_1, 111670_1 1212110642	CMI	Deleted ghg	Transaction Date 12/21/2012	07/01/2011		harsha bs
111670_1, 111670_1 1212110642	CMI	Deleted ghg	Amount 12/21/2012	50.00		harsha bs
111670_1, 111670_1 1212110642	CMI	Deleted ghg	Bill Code 12/21/2012	ADMIN		harsha bs
111670_1, 111670_1 1212110642	CMI	Deleted ghg	Reference 12/21/2012	AUTOCHG		harsha bs
111670_1, 111670_1 1212110642	CMI	Deleted ghg	Term 12/21/2012	0		harsha bs
111670_1, 111670_1 1212110642	CMI	Deleted ghg	AcademicYear 12/21/2012	1		harsha bs
111670_1, 111670_1 1212110642	CMI	Deleted ghg	Check No 12/21/2012			harsha bs

9 record(s) selected

Campus Management

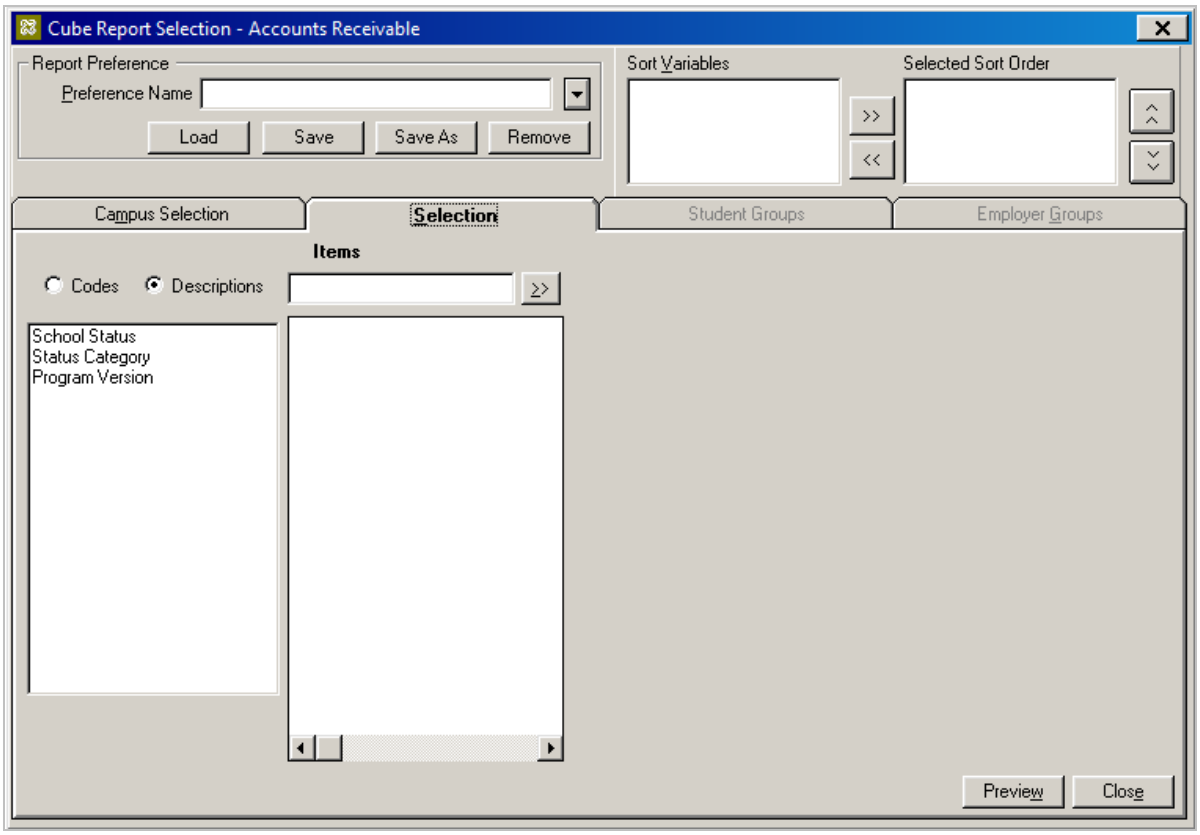
Page 1 of 1

Accounts Receivable

This cube report can be used to analyze accounts receivable (AR) balances. The balances are computed from Enrollment Balances .

To run the report:

1. Navigate to **Reports > Student Accounts > Accounts Receivable**. The Cube Report Selection: Accounts Receivable form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

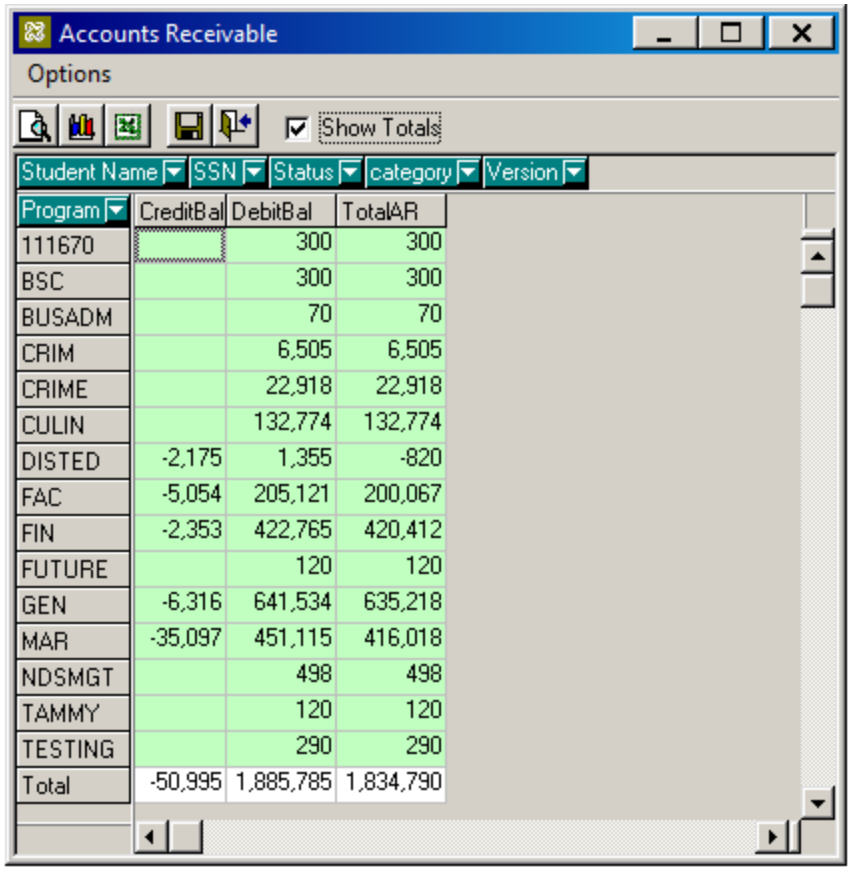


4. Click **Preview**. The cube report is assembled and displayed.

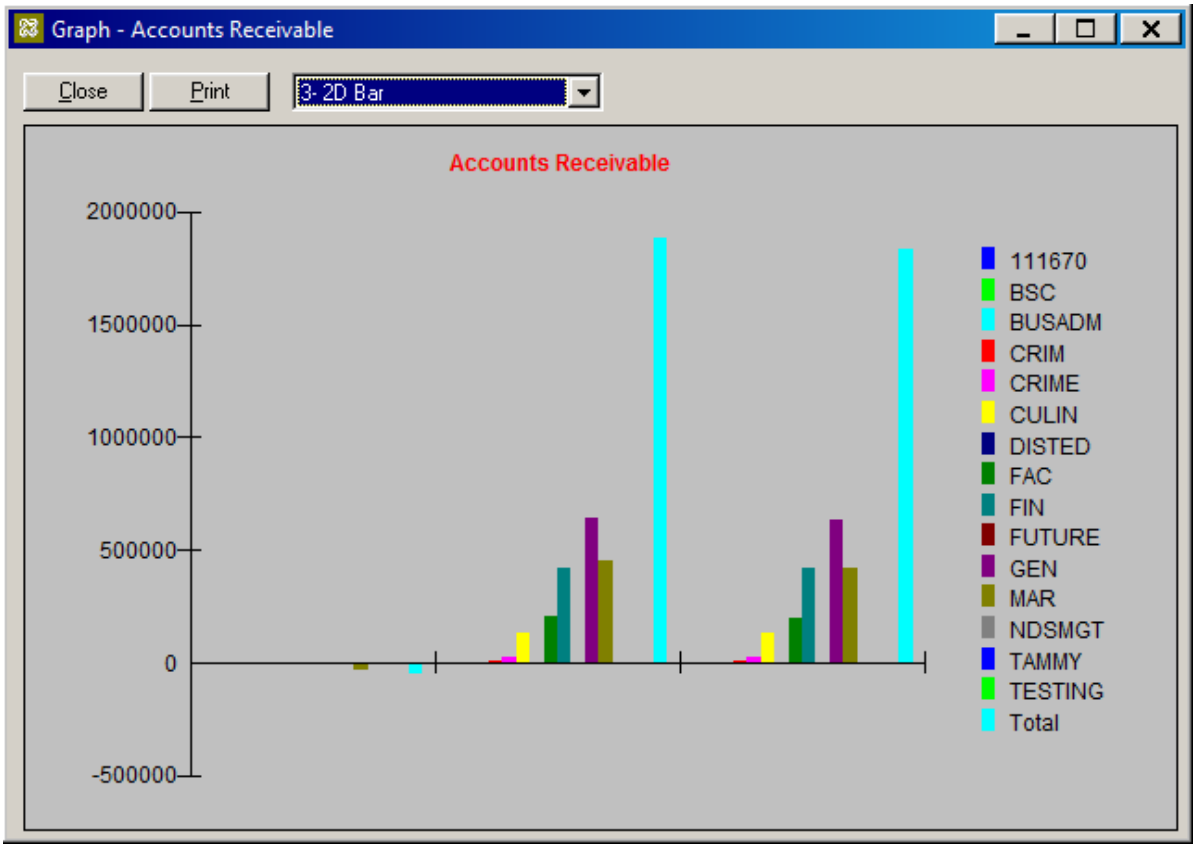
   The following variables are available for use in this cube report:

   - Student Name
   - SSN
   - Status
   - Category
   - Program Version
   - Program
   - AR Debit Balances
   - AR Credit Balances
   - Total AR

Drag the variables to the vertical or horizontal axes as needed to get the cross-tabulated spreads. The cube is initialized with Program as the Y axis (rows) and Credit Balance, Debit Balance, Total AR as the X axis (columns).



Program	CreditBal	DebitBal	TotalAR
111670		300	300
BSC		300	300
BUSADM		70	70
CRIM		6,505	6,505
CRIME		22,918	22,918
CULIN		132,774	132,774
DISTED	-2,175	1,355	-820
FAC	-5,054	205,121	200,067
FIN	-2,353	422,765	420,412
FUTURE		120	120
GEN	-6,316	641,534	635,218
MAR	-35,097	451,115	416,018
NDSMGT		498	498
TAMMY		120	120
TESTING		290	290
Total	-50,995	1,885,785	1,834,790


Graph - Accounts Receivable
Close
Print
3- 2D Bar
Accounts Receivable
2000000
1500000
1000000
500000
0
-500000
111670
BSC
BUSADM
CRIM
CRIME
CULIN
DISTED
FAC
FIN
FUTURE
GEN
MAR
NDSMGT
TAMMY
TESTING
Total

Bank Deposit Report

This cube report can be used to analyze bank deposits.

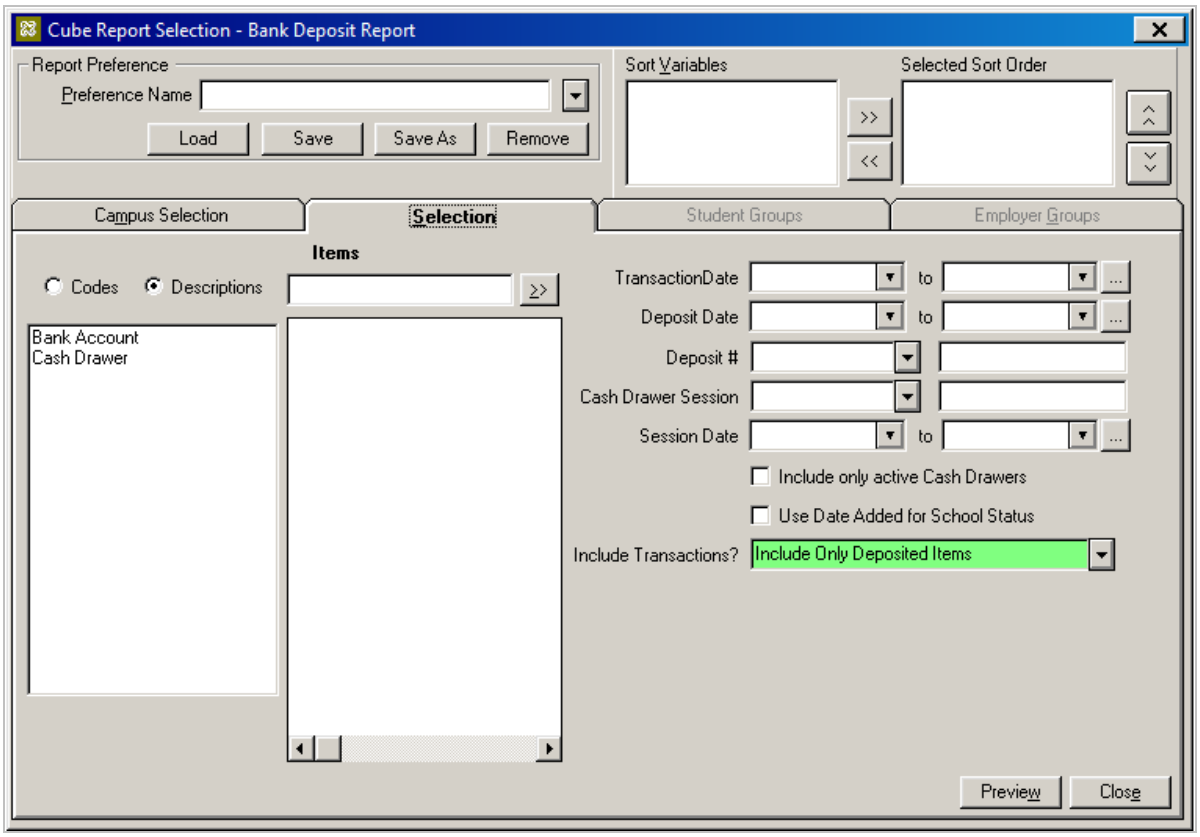
To run the report:

1. Navigate to **Reports > Student Accounts > Bank Deposit Report**. The Cube Report Selection: Bank Deposit Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Note: The 'Include Transactions?' options are as follows:

   - Collected in a Bank Deposit Only
   - Not Collected in a Bank Deposit Only
   - Include All Transactions

   An example of a 'Not Collected in a Bank Deposit Only' transaction are EFT bank transactions which are recorded electronically, i.e., no bank deposit slip is issued.



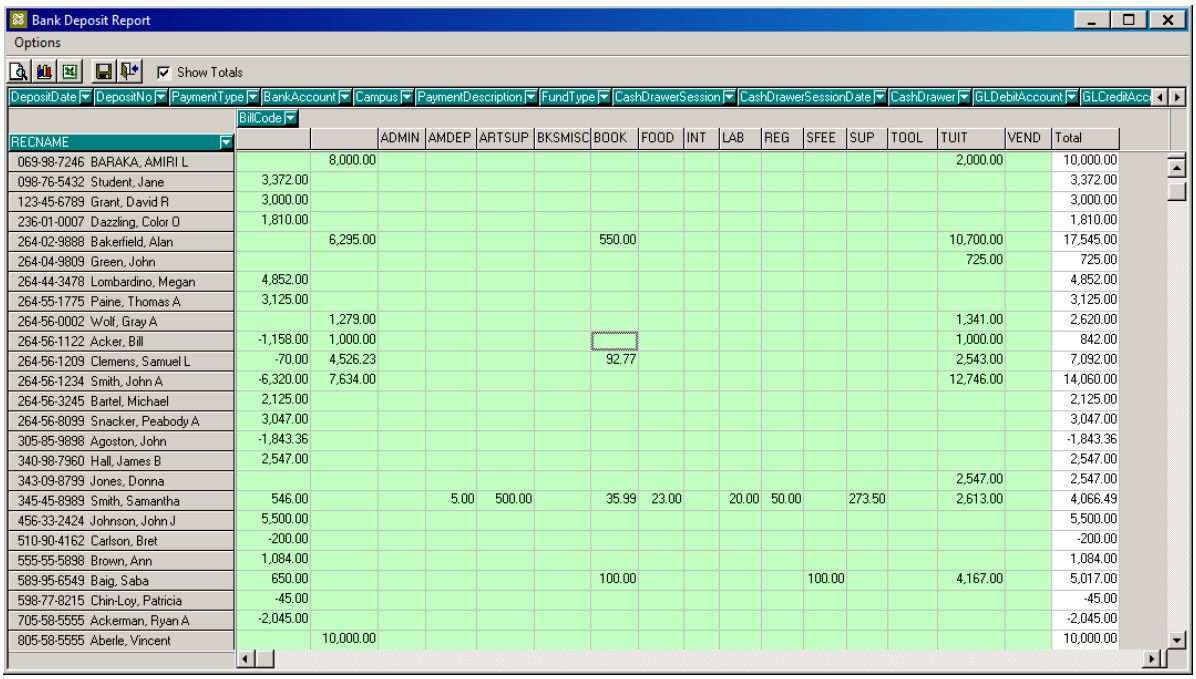
4. Click **Preview**. The cube report is assembled and displayed.

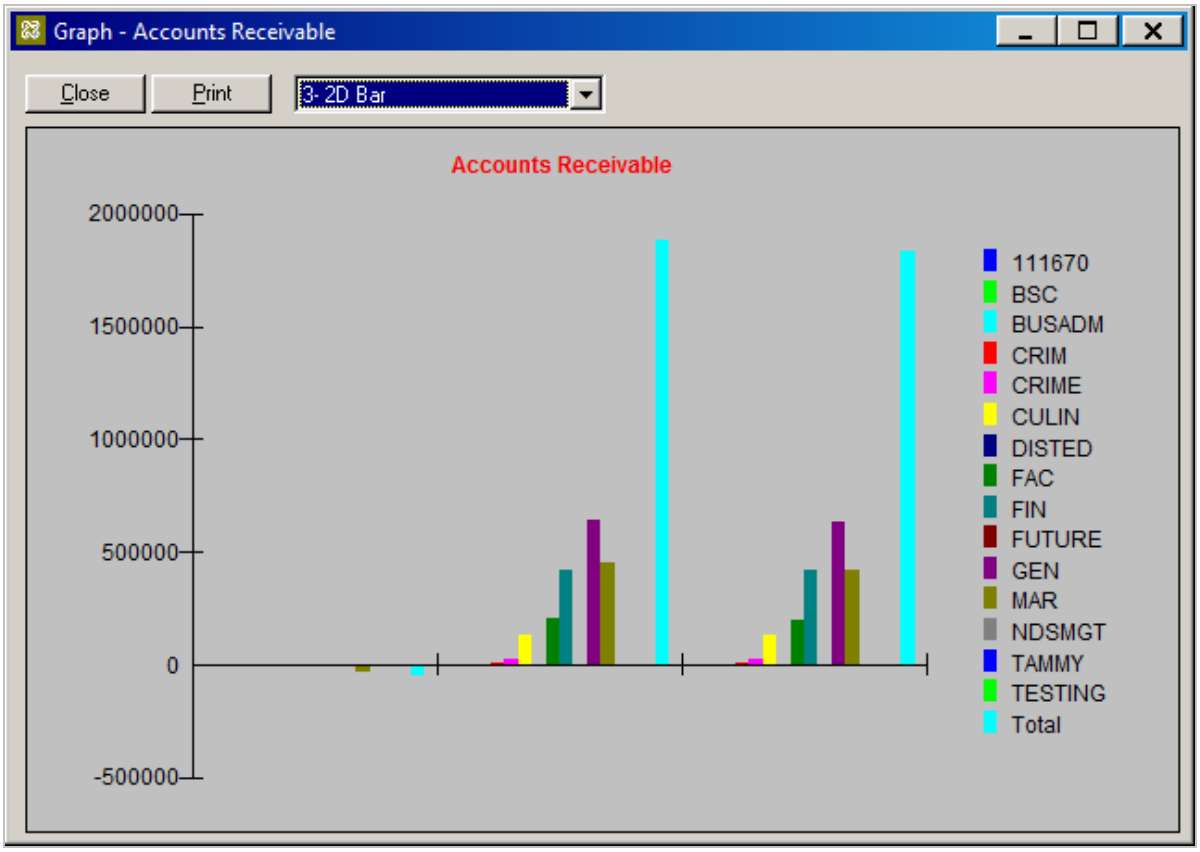
   The following variables are available for use in this cube report:

   - Record Name (a composite variable composed of student name, SSN, and receipt number)
   - Payment Type (cash, check, and credit card)

- Transaction Code (labeled as BillCode)
- Receipt Date
- Deposit Date
- Deposit Number
- Payment Type
- Bank Account
- Campus
- Payment Description
- Fund Type
- Cash Drawer Session
- Cash Drawer Session Date
- Cash Drawer
- General Ledger Debit Account
- General Ledger Credit Account
- Fund Source Code
- School Status
- NSFs
- Bill Code

Drag the variables to the vertical or horizontal axes as needed to get the cross-tabulated spreads. The cube is initialized with Receipt Name as the Y axis (rows) and Bill Code as the X axis (columns).



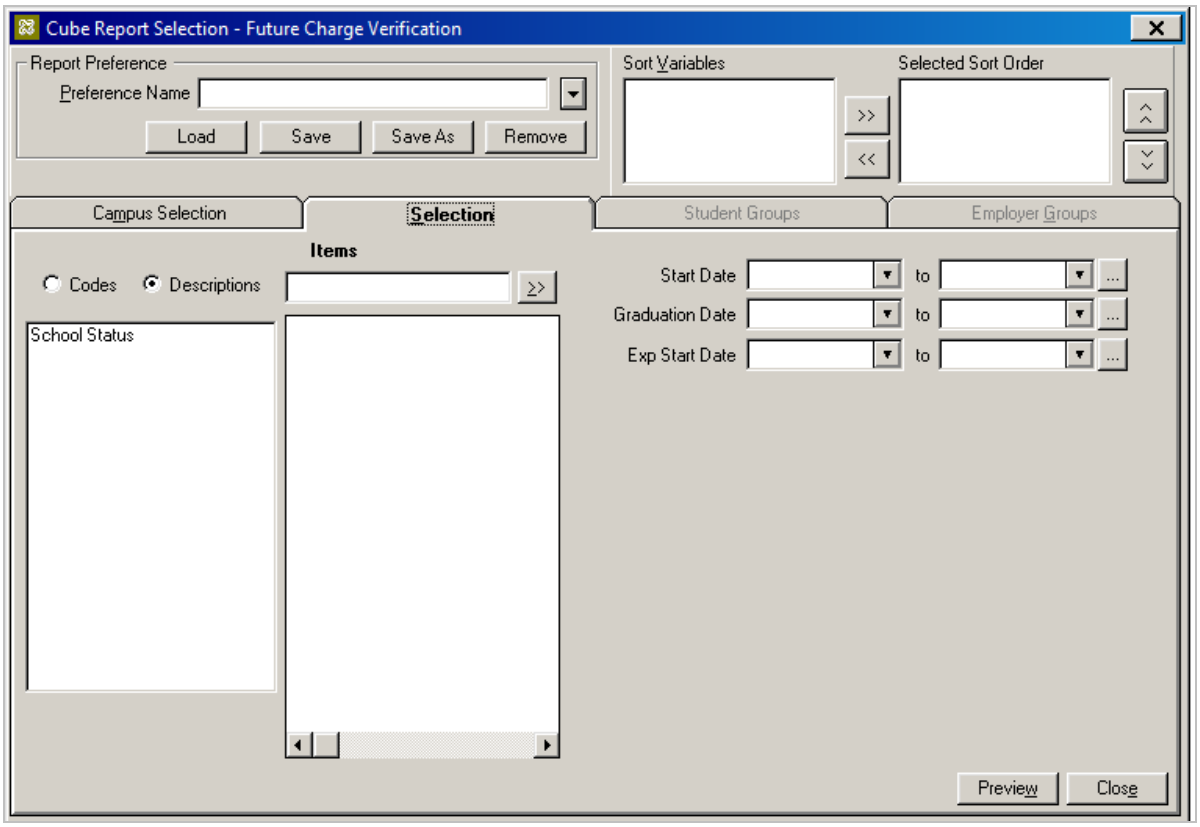

Graph - Accounts Receivable
Close
Print
3- 2D Bar
Accounts Receivable
2000000
1500000
1000000
500000
0
-500000
111670
BSC
BUSADM
CRIM
CRIME
CULIN
DISTED
FAC
FIN
FUTURE
GEN
MAR
NDSMGT
TAMMY
TESTING
Total

Future Charge Verification

This cube report displays future charge information for each student so that the user can easily determine if a student is over or under charged.

To run the report:

1. Navigate to **Reports > Student Accounts > Future Charge Verification**. The Cube Report Selection: Future Charge Verification form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



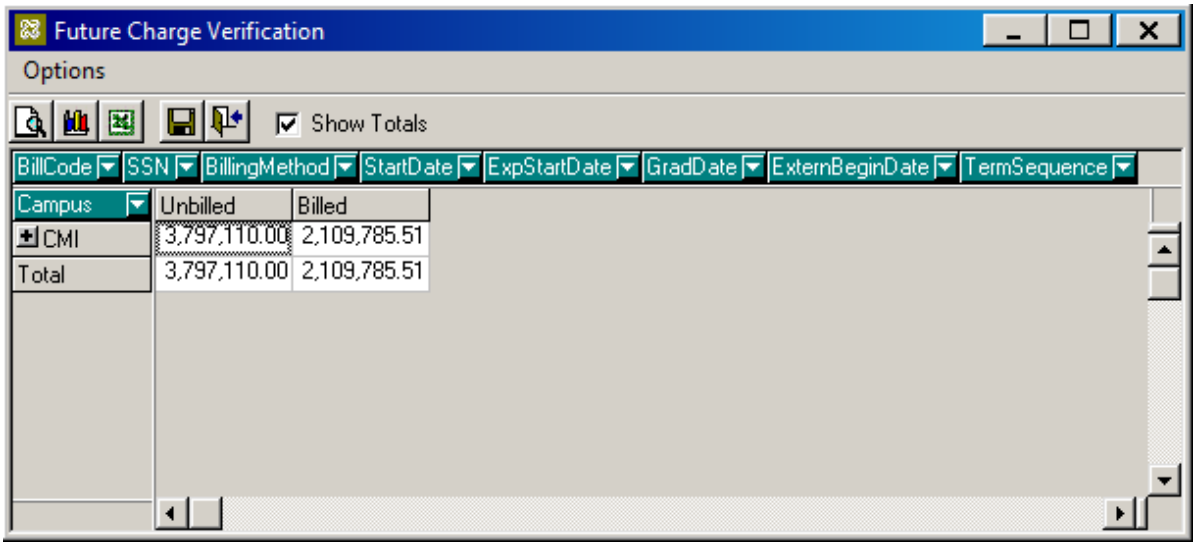
4. Click **Preview**. The cube report is assembled and displayed.

   The following variables are available for use in this cube report:

   - Bill Code
   - SSN
   - Billing Method
   - Start Date
   - Expected Start Date
   - Graduation Date
   - Externship Begin Date
   - Term Sequence
   - Campus

- Total Unbilled Tuition Charges
- Total Billed Tuition Charges

Drag the variables to the vertical or horizontal axes as needed to get the cross-tabulated spreads. The cube is initialized with Campus as the Y axis (rows) and Unbilled and Billed as the X axis (columns).

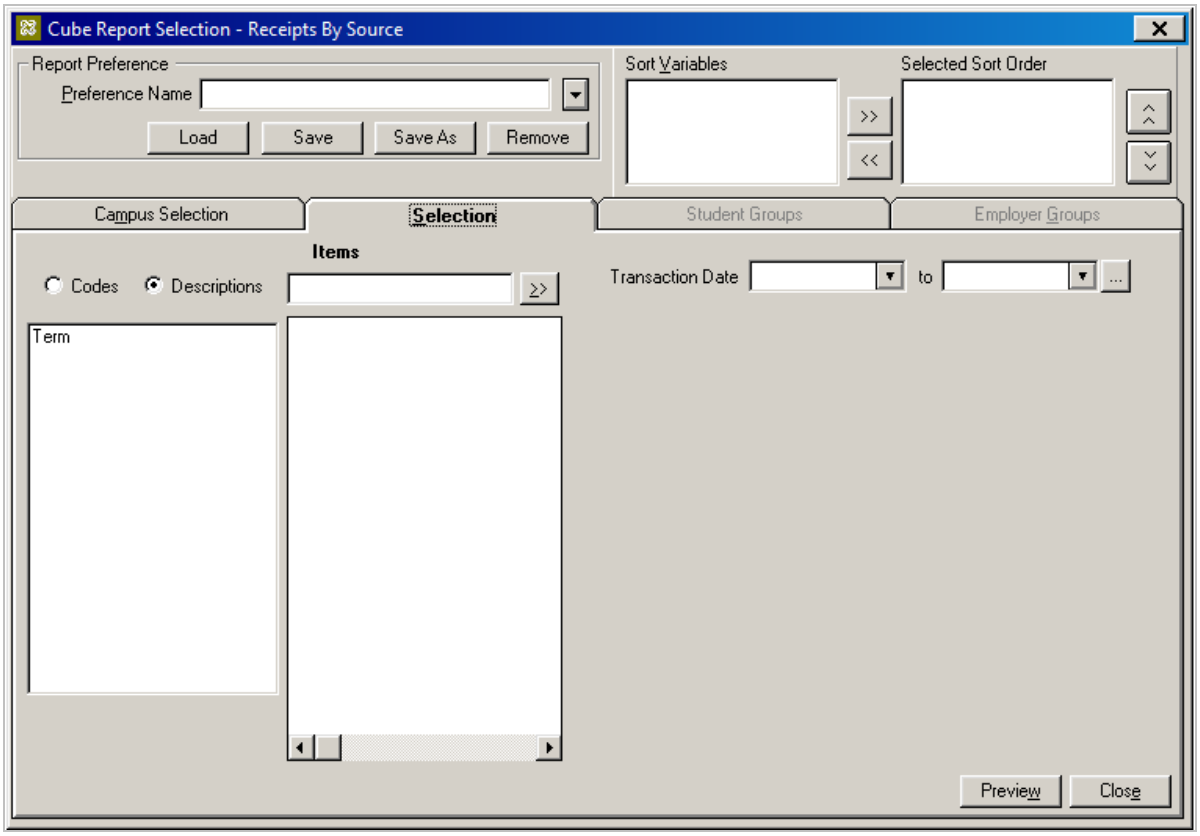


Receipts by Source

This cube report displays receipts from the various fund sources at your institution.

To run the report:

1. Navigate to **Reports > Student Accounts > Receipts by Source**. The Cube Report Selection: Receipts by Source form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

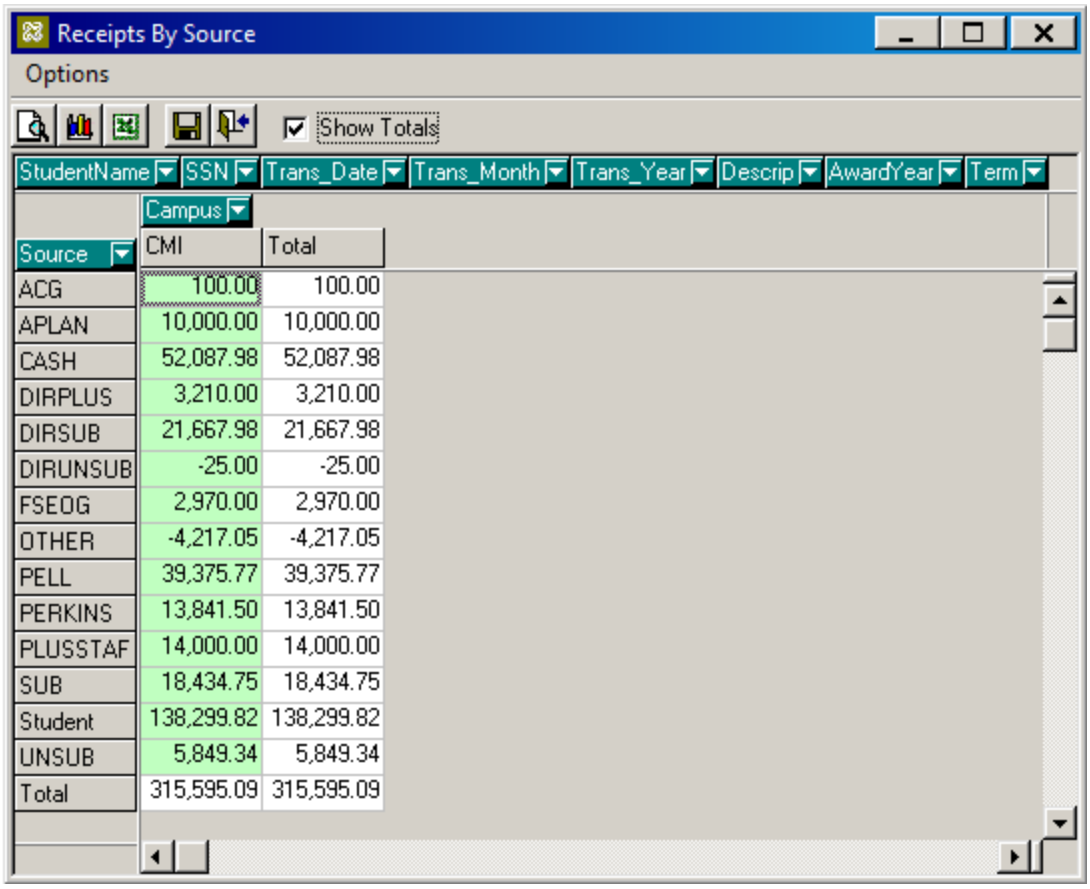


4. Click **Preview**. The cube report is assembled and displayed.

   The following variables are available for use in this cube report:

   - Student Name
   - SSN
   - Transaction Date
   - Transaction Month
   - Transaction Year
   - Transaction Description
   - Award Year
   - Term
   - Fund Source
   - Campus

Drag the variables to the vertical or horizontal axes as needed to get the cross-tabulated spreads. The cube is initialized with Source as the Y axis (rows) and Campus as the X axis (columns).

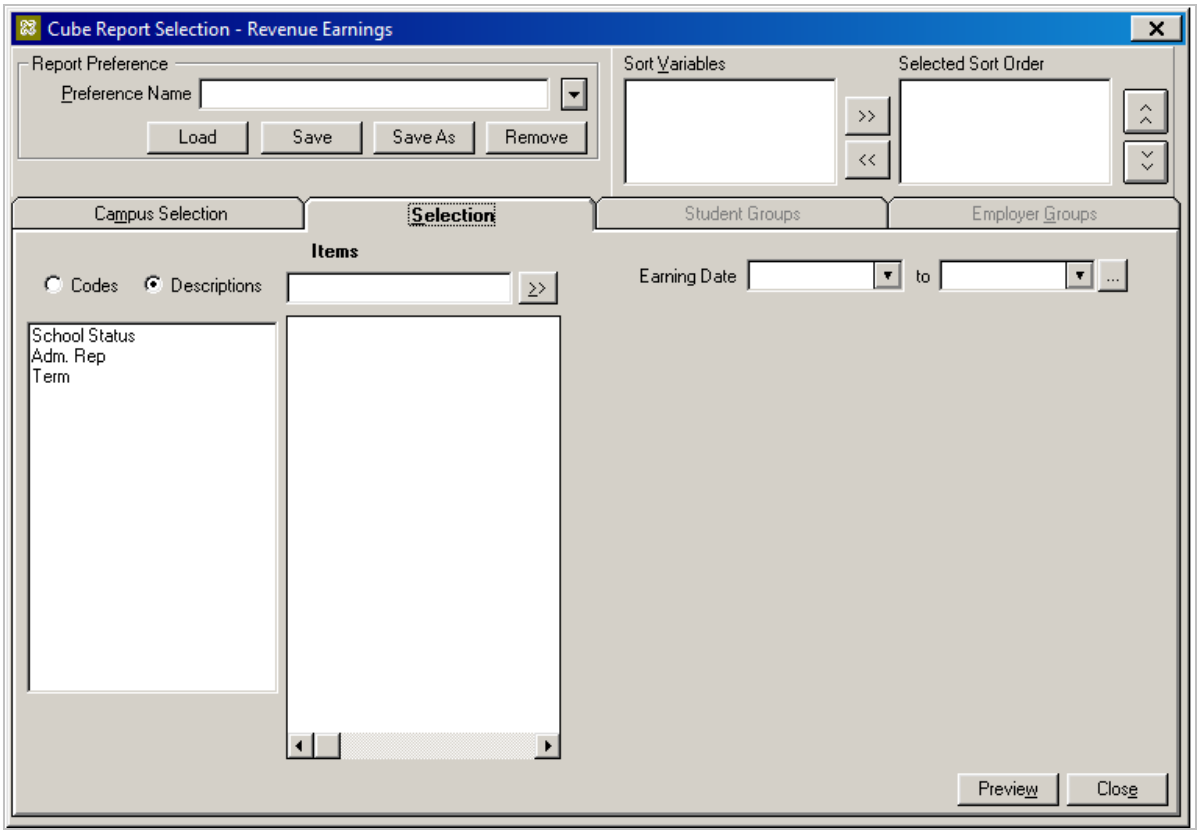


Revenue Earnings

This cube report is used to analyze how revenue is distributed according to various CampusNexus Student parameters.

To run the report:

1. Navigate to **Reports > Student Accounts > Revenue Earnings**. The Cube Report Selection: Revenue Earnings form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



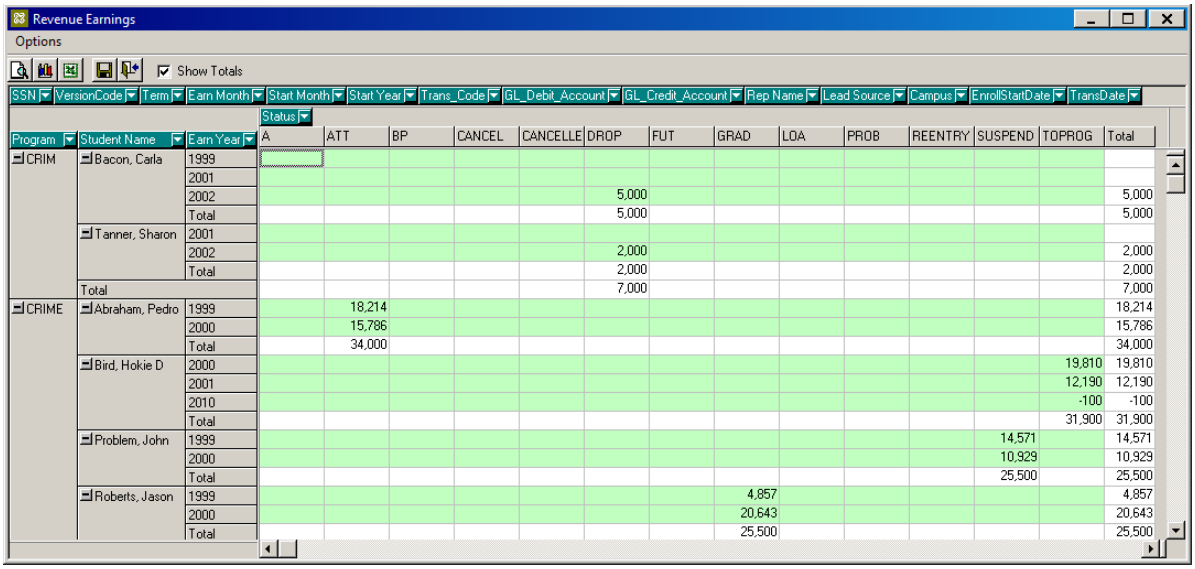
4. Click **Preview**. The cube report is assembled and displayed.

   The following variables are available for use in this cube report:

   - SSN
   - Program Version Code
   - Term
   - Earn Month
   - Start Month
   - Start Year
   - Earn Year
   - Transaction Code
   - GL Debit Account
   - GL Credit Account

- Rep Name
- Lead Source
- Campus
- Enrollment Start Date
- Transaction Date
- Student Name
- Program
- Student Status

Drag the variables to the vertical or horizontal axes as needed to get the cross-tabulated spreads. The cube is initialized with Program, Student name, and Earn Year as the Y axis (rows) and Status as the X axis (columns).



Academic Records Reports

Navigate to **Reports > Academic Records** to access the following Academic Records reports:

- Absences by Consecutive Days
- Absences by Consecutive Days by Course
- Absences by Days
- Absences by Days by Course
- Academic History and Advising Report
- Area of Study Change Report
- Area of Study Student Listing Report
- Attendance Summary
- Attendance Summary by Program Report for Clock Hour
- Class Meeting Pattern
- Class Rank
- Class Rank Overall
- Class Roster by Course
- Class Roster by Instructor
- Class Schedule
- Class Schedule Book Listing Detail
- Class Schedule by Room
- Class Schedule with Instructor Attributes
- Classes Missed Report
- Course Drops
- Course Waitlist Report
- Detail Attendance
- Drop Report
- Final Grade
- Final Grades Work Sheets
- Gainful Employment Error/Acknowledgement
- Gainful Employment Export
- GPA Average Range
- GPA Changes Audit
- Instructor Attendance Analysis
- Instructor Course Association
- Instructor Drop Analysis
- Lesson Report
- Lesson Status
- Locked Term Sequence Courses
- Master Student Listing Detail
- Master Student Listing Summary
- Midterm Report Card
- Online/Extern Course Requirements Report
- Percentage of Classes Missed
- Posted/Unposted Attendance
- Posted/Unposted Grades
- Posted/Unposted Midterm Grades
- Potential Grades
- Practicum Eligible Students
- Progress Report
- Registered Credits by Confirmed Term
- Registered Credits by Term
- Report Cards
- Retaken Courses

- SAP Audit Report
- SAP Enrollment Detail Report
- SAP Job Failure Report
- SAP Payment Period Detail Report
- SAP Term Detail Report
- Scantron Roster Status Report
- Scheduled Return from LOA
- Selected Letter Grade Report
- Status Change Discrepancies
- Student Based Transcript
- Student Daily Schedule
- Student Degree Evaluation Report
- Student Schedule
- Student Status Changes
- Term Registration Analysis
- Term Relationship
- Transcripts-Official
- Transcripts-Unofficial
- Class Section Registration (cube report)
- Course Drop Statistics (cube report)
- Demographics (cube report)
- Future Course Seat Requirements (cube report)
- Instructor Grade Analysis (cube report)
- Term Enrollment Summary (cube report)

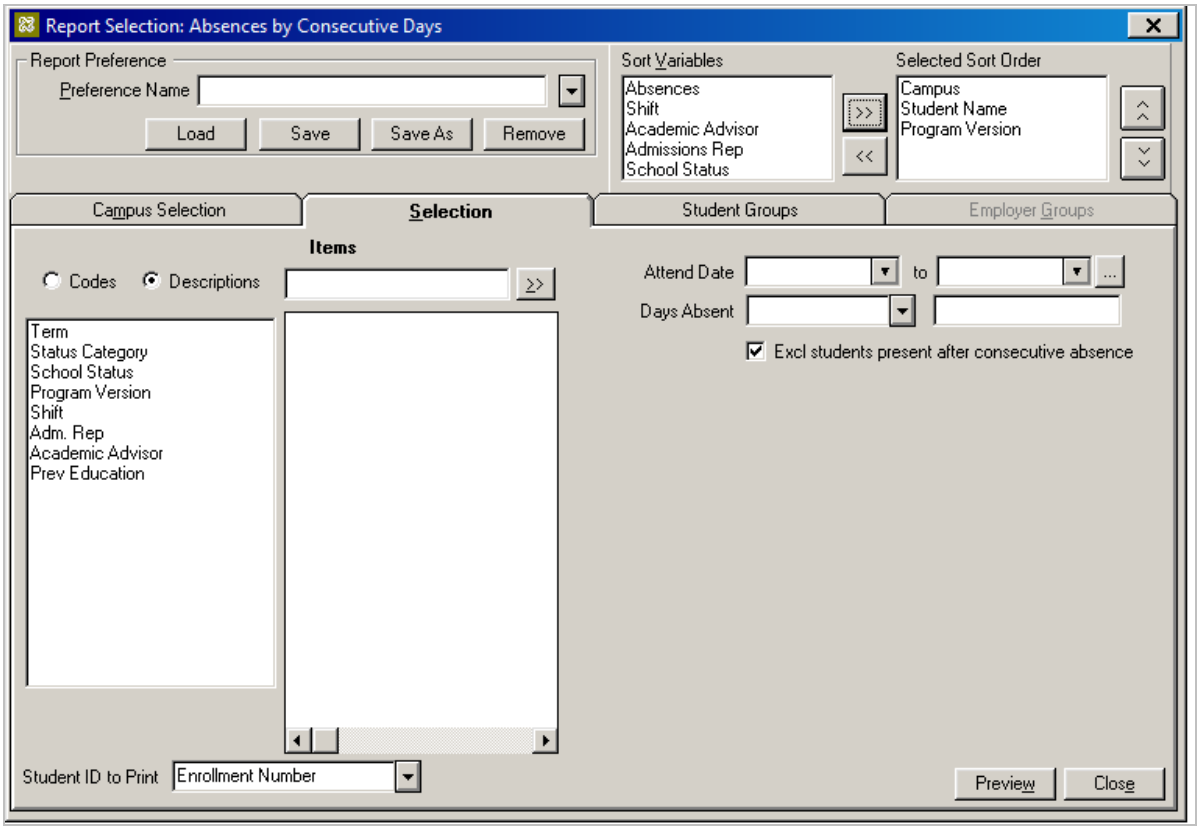
Note: The System Administrator must set up security rights to view, print, or export reports. Staff members and staff groups must be given security rights to view, print, and/or export reports. This does not apply to custom reports.

Absences by Consecutive Days

This report lists students who have been absent from school for a consecutive number of days as of the date the report is run. This report can be used to quickly identify any students who may be in danger of dropping from school. You can enter the minimum number of days absent required for a student to appear on the report.

To run the report:

1. Navigate to **Reports > Academic Records > Absences by Consecutive Days**. The Report Selection: Absences by Consecutive Days form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Student ID
   - Phone
   - Status
   - Program Version

- Shift
- Start Date
- Last Date Attended (LDA)
- Admissions Representative
- Academic Advisor
- # of Days Absent

The report provides, by campus, the total number of students appearing on the report along with the grand total number of records selected.

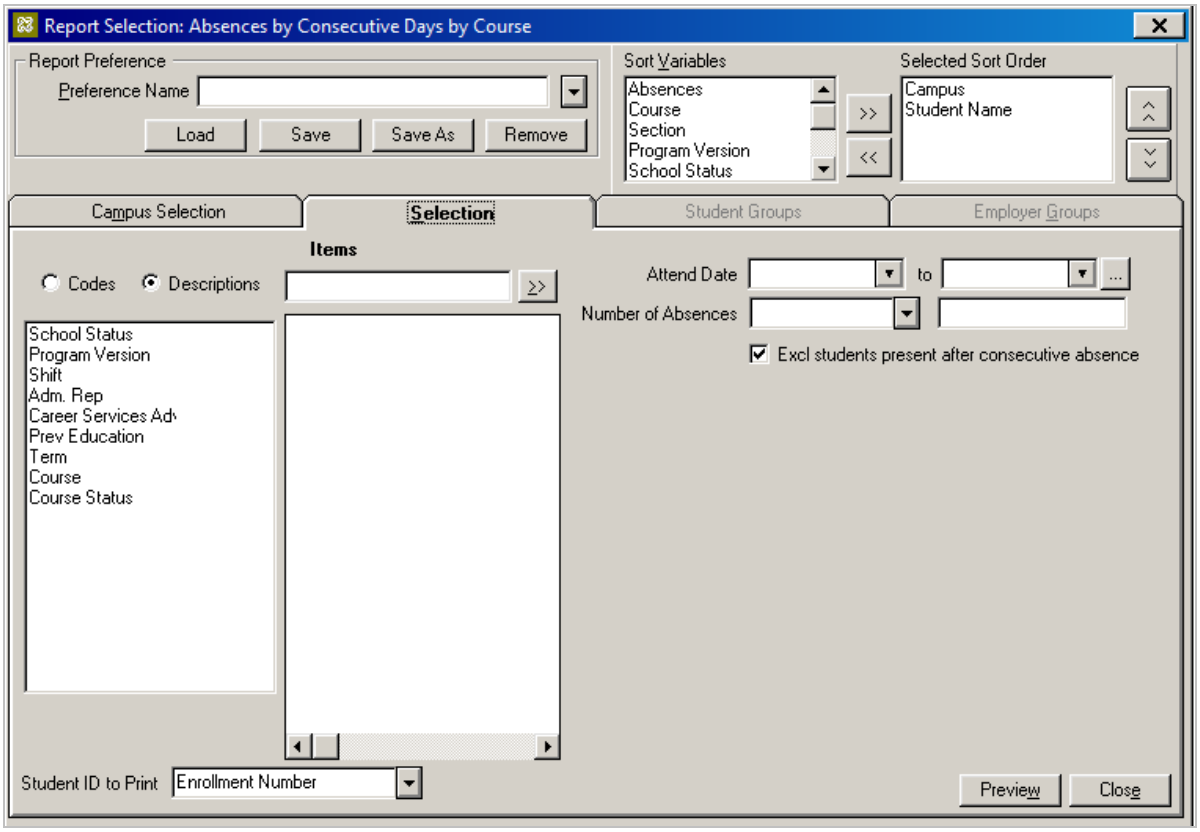
Absences by Consecutive Days by Course

This report shows the number of consecutive absences of a student from a class section.

To run the report:

1. Navigate to **Reports > Academic Records > Absences by Consecutive Days by Course**. The Report Selection: Absences by Consecutive Days by Course form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Selection criteria are School Status, Program Version, Shift, Adm. Rep, Career Services Advisor, Prev Education, Term, Course, Course Status, Attend Date, Days Absent, and 'Exclude students with Course LDA after end date'.

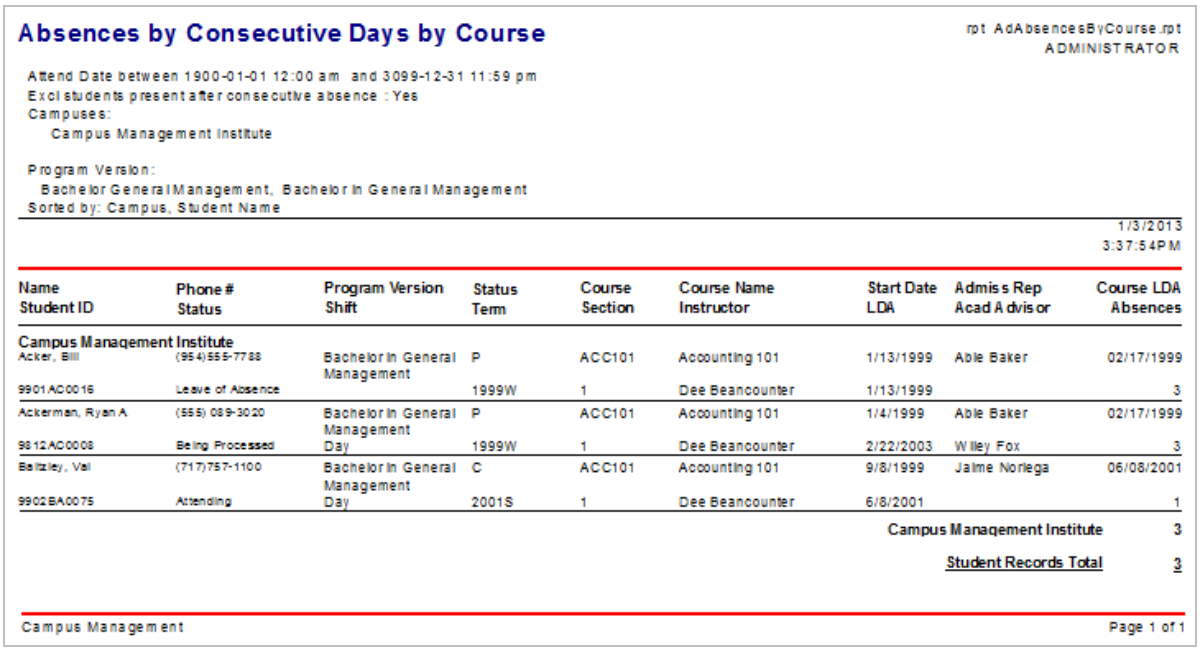


4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Name
   - Student ID
   - Phone #
   - Status
   - Program Version
   - Shift
   - Status

- Term
- Course
- Section
- Course Name
- Instructor
- Start Date
- Last Date of Attendance (LDA)
- Admissions Representative
- Academic Advisor
- Course LDA
- Absences



Absences by Consecutive Days by Course

rpt AdAbsencesByCourse.rpt
ADMINISTRATOR

Attend Date between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Excl students present after consecutive absence : Yes
Campuses:
Campus Management Institute

Program Version:
Bachelor General Management, Bachelor In General Management
Sorted by: Campus, Student Name

1/3/2013
3:37:54 PM

Name / Student ID	Phone # / Status	Program Version / Shift	Status / Term	Course / Section	Course Name / Instructor	Start Date / LDA	Admiss Rep / Acad Advisor	Course LDA / Absences
Campus Management Institute								
Acker, Bill	(954)555-7788	Bachelor In General Management	P	ACC101	Accounting 101	1/13/1999	Able Baker	02/17/1999
9901AC0016	Leave of Absence		1999W	1	Dee Beancounter	1/13/1999		3
Ackerman, Ryan A	(555) 089-3020	Bachelor In General Management	P	ACC101	Accounting 101	1/4/1999	Able Baker	02/17/1999
9812AC0008	Being Processed	Day	1999W	1	Dee Beancounter	2/22/2003	Willey Fox	3
Baltzley, Val	(717)757-1100	Bachelor In General Management	C	ACC101	Accounting 101	9/8/1999	Jaime Noriega	06/08/2001
9902BA0075	Attending	Day	2001S	1	Dee Beancounter	6/8/2001		1
							Campus Management Institute	**3**
							Student Records Total	**3**

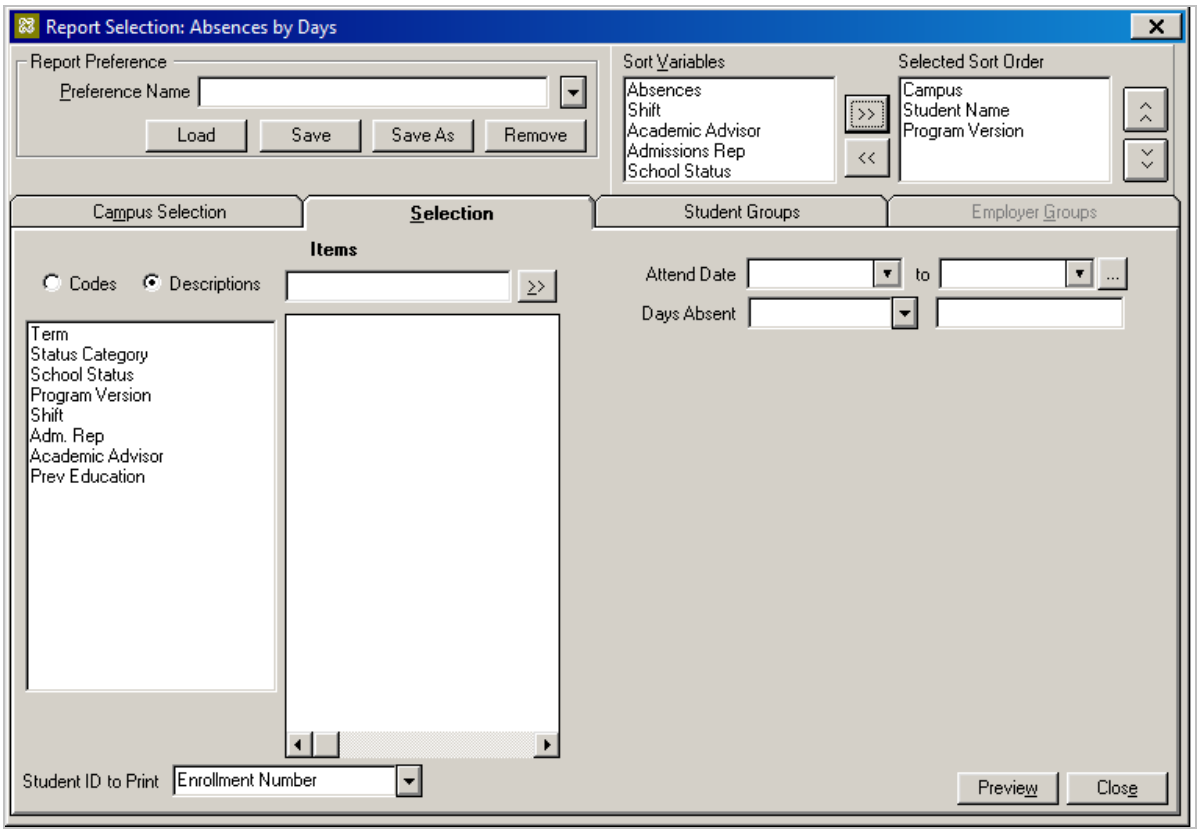
Campus Management
Page 1 of 1

Absences by Days

This report shows those students who were absent between a specified date range and by a specified minimum number of days a student could be absent (not consecutively).

To run the report:

1. Navigate to **Reports > Academic Records > Absences by Days**. The Report Selection: Absences by Days form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

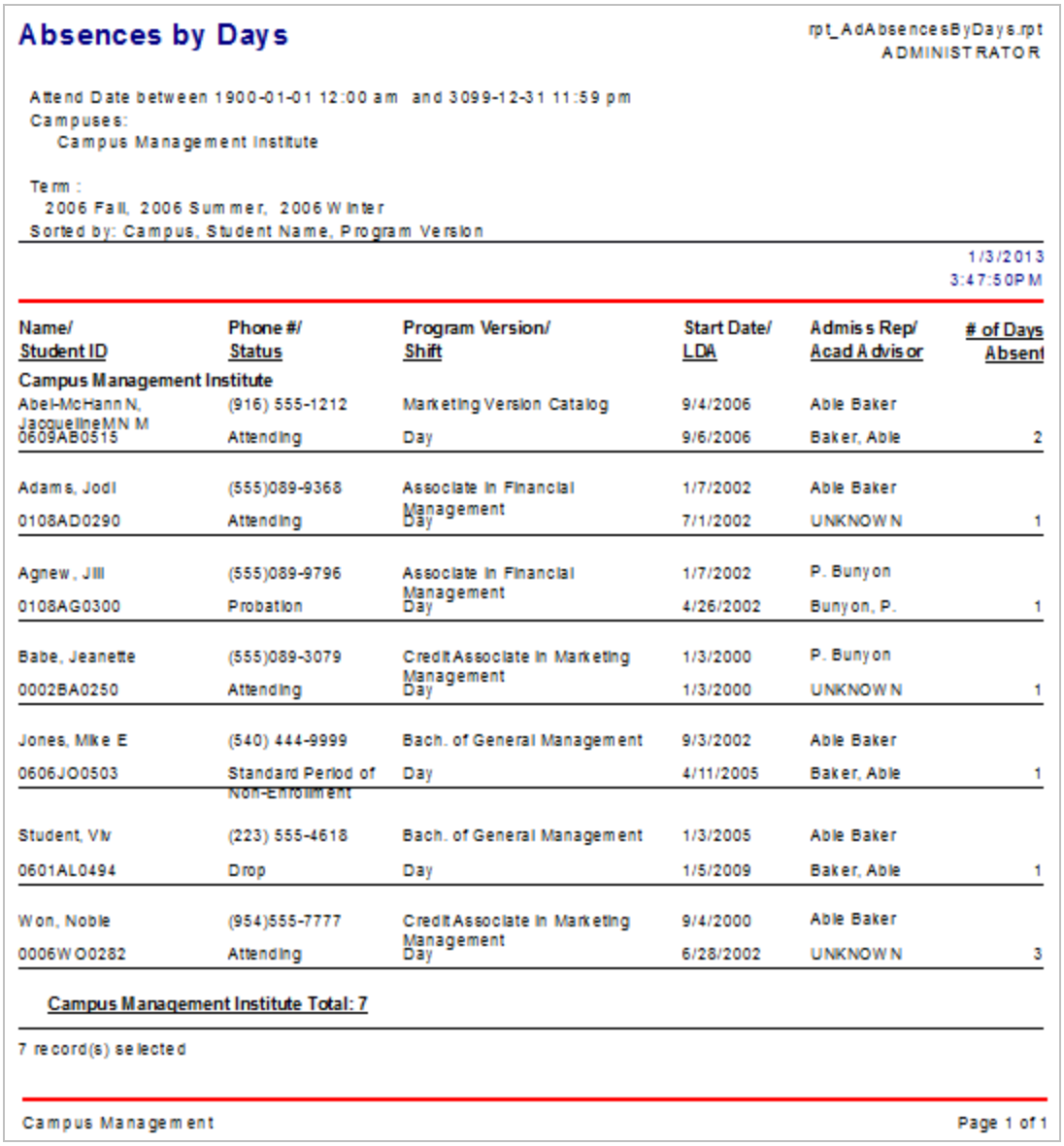
   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Name
   - Student ID
   - Phone #
   - Status
   - Program Version

- Shift
- Start Date
- Last Date of Attendance (LDA)
- Admissions Representative
- Academic Advisor
- # of Days Absent



Absences by Days

rpt_AdAbsencesByDays.rpt
ADMINISTRATOR

Attend Date between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Campuses:
Campus Management Institute

Term :
2006 Fall, 2006 Summer, 2006 Winter
Sorted by: Campus, Student Name, Program Version

1/3/2013
3:47:50PM

Name/ Student ID	Phone #/ Status	Program Version/ Shift	Start Date/ LDA	Admiss Rep/ Acad Advisor	# of Days Absent
Campus Management Institute					
Abel-McHann N, Jacqueline M N M	(916) 555-1212	Marketing Version Catalog	9/4/2006	Able Baker	
0609AB0515	Attending	Day	9/6/2006	Baker, Able	2
Adams, Jodi	(555)089-9368	Associate in Financial Management	1/7/2002	Able Baker	
0108AD0290	Attending	Day	7/1/2002	UNKNOWN	1
Agnew, Jill	(555)089-9796	Associate in Financial Management	1/7/2002	P. Bunyon	
0108AG0300	Probation	Day	4/26/2002	Bunyon, P.	1
Babe, Jeanette	(555)089-3079	Credit Associate in Marketing Management	1/3/2000	P. Bunyon	
0002BA0250	Attending	Day	1/3/2000	UNKNOWN	1
Jones, Mike E	(540) 444-9999	Bach. of General Management	9/3/2002	Able Baker	
0606JO0503	Standard Period of Non-Enrollment	Day	4/11/2005	Baker, Able	1
Student, Viv	(223) 555-4618	Bach. of General Management	1/3/2005	Able Baker	
0601AL0494	Drop	Day	1/5/2009	Baker, Able	1
Won, Noble	(954)555-7777	Credit Associate in Marketing Management	9/4/2000	Able Baker	
0006WO0282	Attending	Day	6/28/2002	UNKNOWN	3
Campus Management Institute Total: 7					

7 record(s) selected

Campus Management — Page 1 of 1

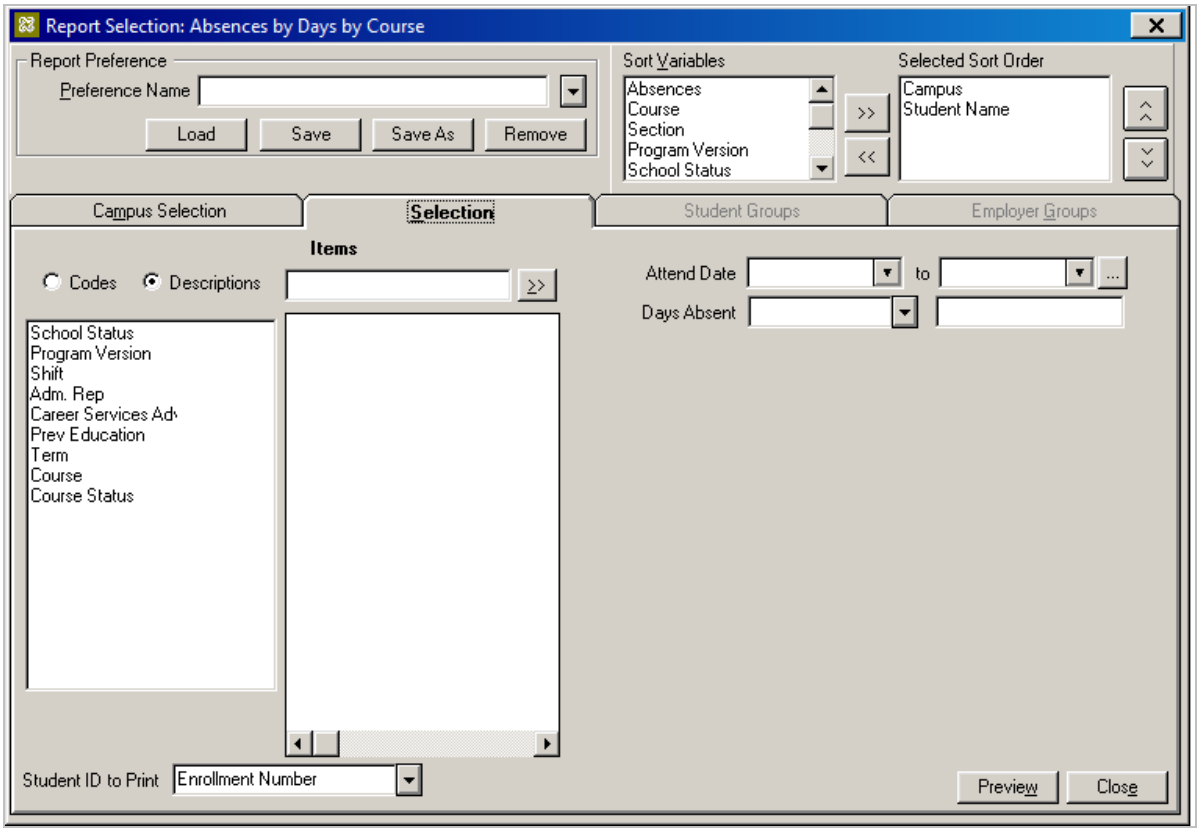
Absences by Days by Course

This report shows those students who were absent between a specified date range from a class section and by a specified minimum number of days a student could be absent (not consecutively).

To run the report:

1. Navigate to **Reports > Academic Records > Absences by Days by Course**. The Report Selection: Absences by Days by Course form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Selection criteria are School Status, Program Version, Shift, Adm. Rep, Career Services Advisor, Prev Education, Term, Course, Course Status, Attend Date, and Days Absent.

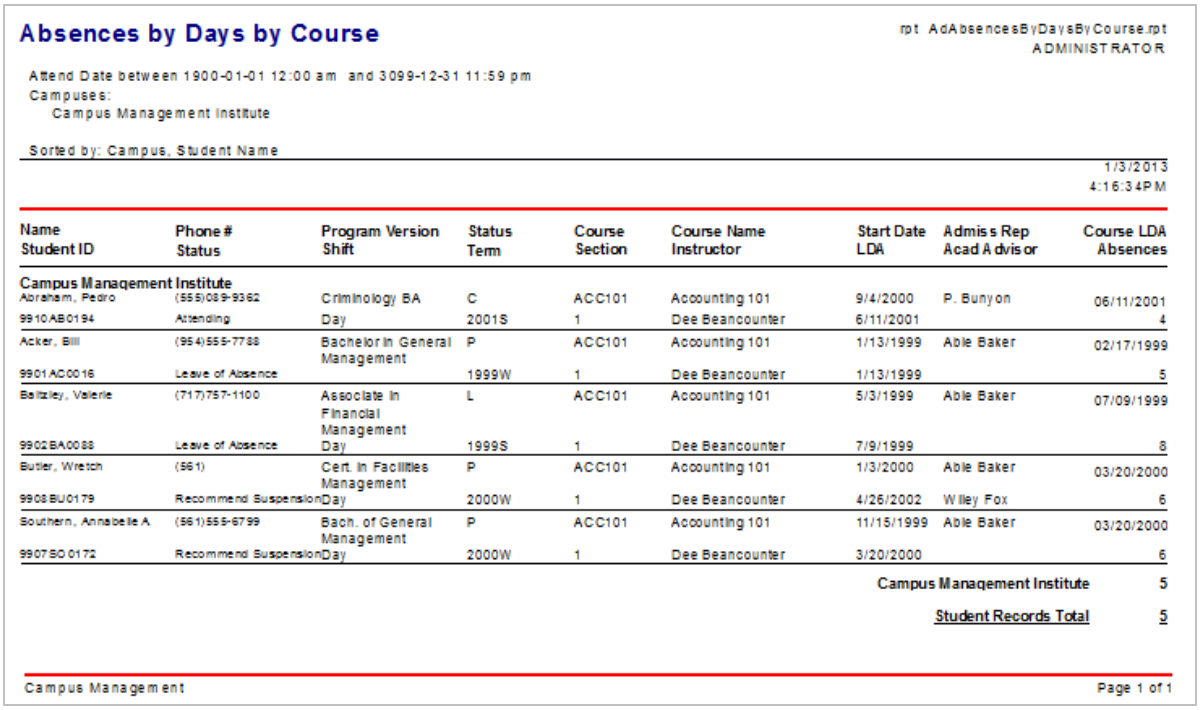


4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Name
   - Student ID
   - Phone #
   - Status
   - Program Version
   - Shift

- Status
- Term
- Course
- Section
- Course Name
- Instructor
- Start Date
- Last Date of Attendance (LDA)
- Admissions Representative
- Academic Advisor
- Course LDA
- Absences



Absences by Days by Course

rpt AdAbsencesByDaysByCourse.rpt
ADMINISTRATOR

Attend Date between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Campuses:
Campus Management Institute

Sorted by: Campus, Student Name

1/3/2013
4:16:34PM

Name / Student ID	Phone # / Status	Program Version / Shift	Status / Term	Course / Section	Course Name / Instructor	Start Date / LDA	Admiss Rep / Acad Advisor	Course LDA / Absences
Campus Management Institute								
Abraham, Pedro	(555)089-9362	Criminology BA	C	ACC101	Accounting 101	9/4/2000	P. Bunyon	06/11/2001
9910AB0194	Attending	Day	2001S	1	Dee Beancounter	6/11/2001		4
Acker, Bill	(954)555-7788	Bachelor in General Management	P	ACC101	Accounting 101	1/13/1999	Able Baker	02/17/1999
9901AC0016	Leave of Absence		1999W	1	Dee Beancounter	1/13/1999		5
Baltzley, Valerie	(717)757-1100	Associate in Financial Management	L	ACC101	Accounting 101	5/3/1999	Able Baker	07/09/1999
9902BA0088	Leave of Absence	Day	1999S	1	Dee Beancounter	7/9/1999		8
Butler, Wretch	(561)	Cert. in Facilities Management	P	ACC101	Accounting 101	1/3/2000	Able Baker	03/20/2000
9908BU0179	Recommend Suspension	Day	2000W	1	Dee Beancounter	4/26/2002	Wiley Fox	6
Southern, Annabelle A	(561)555-6799	Bach. of General Management	P	ACC101	Accounting 101	11/15/1999	Able Baker	03/20/2000
9907SO0172	Recommend Suspension	Day	2000W	1	Dee Beancounter	3/20/2000		6
							Campus Management Institute	**5**
							Student Records Total	**5**

Campus Management

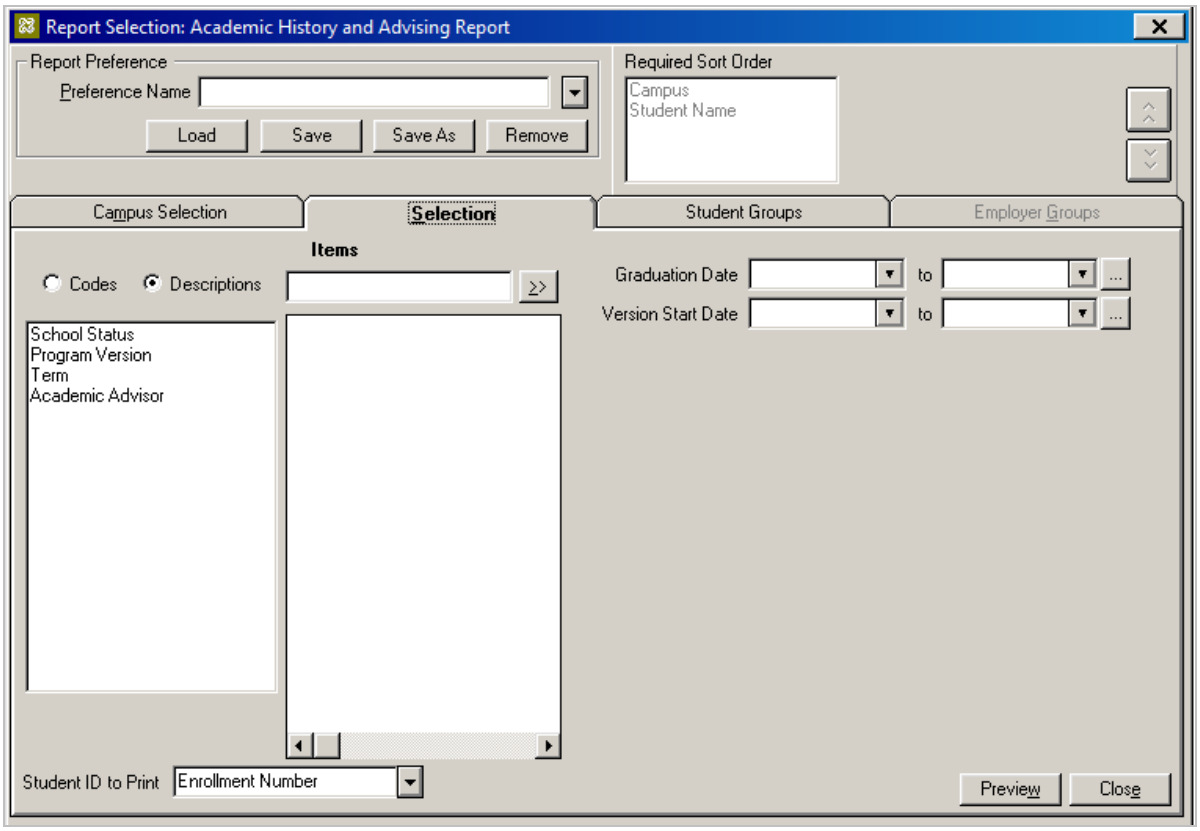
Page 1 of 1

Academic History and Advising Report

This report provides a detailed history of a student's academic history and future courses. It is useful when a snapshot of a student's total academic history is required to determine, for example, if a student needs academic counseling.

To run the report:

1. Navigate to **Reports > Academic Records > Academic History and Advising Report**. The Report Selection: Academic History and Advising Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

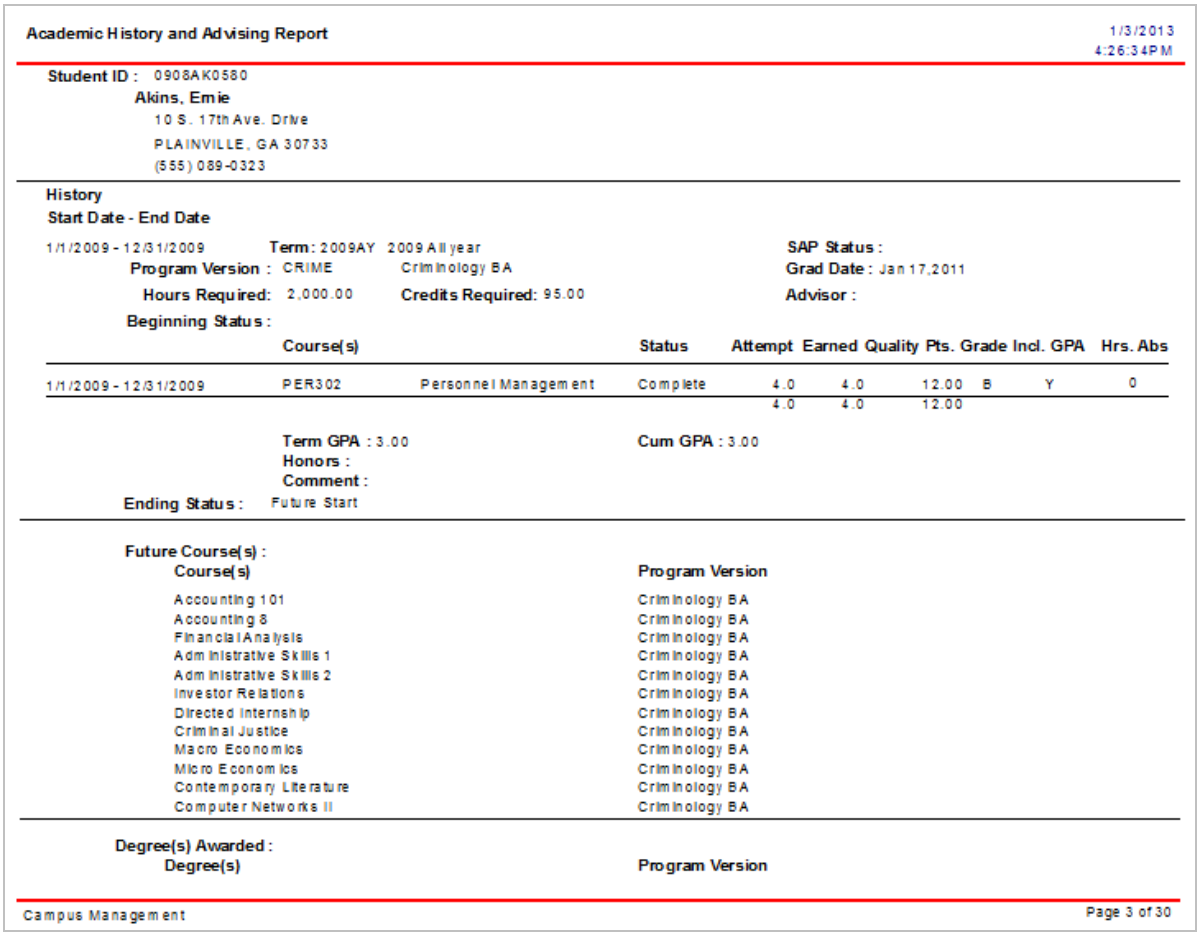
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   Each student's information begins on a new page of the report. The student's ID, name, address, and phone number are listed.

   For each term, the start and end dates, term code, term name, program version, hours and credits required, SAP status, expected graduation date, advisor, and school status are listed.

All courses attempted in the term are displayed complete with course status, grades, quality points, and hours absent. The term GPA, cumulative GPA, honors assignments, and any comments for the term are shown.

After the student's terms are shown, a list of the student's future courses and associated program versions are displayed.



Academic History and Advising Report 1/3/2013 4:26:34PM

Student ID : 0908AK0580
Akins, Emie
10 S. 17th Ave. Drive
PLAINVILLE, GA 30733
(555) 089-0323

History
Start Date - End Date

1/1/2009 - 12/31/2009 **Term:** 2009AY 2009 All year **SAP Status :**
Program Version : CRIME Criminology BA **Grad Date :** Jan 17,2011
Hours Required: 2,000.00 **Credits Required:** 95.00 **Advisor :**
Beginning Status :

	Course(s)		Status	Attempt	Earned	Quality Pts.	Grade	Incl. GPA	Hrs. Abs
1/1/2009 - 12/31/2009	PER302	Personnel Management	Complete	4.0	4.0	12.00	B	Y	0
				4.0	4.0	12.00			

Term GPA : 3.00 **Cum GPA :** 3.00
Honors :
Comment :
Ending Status : Future Start

Future Course(s) :

Course(s)	Program Version
Accounting 101	Criminology BA
Accounting 8	Criminology BA
Financial Analysis	Criminology BA
Administrative Skills 1	Criminology BA
Administrative Skills 2	Criminology BA
Investor Relations	Criminology BA
Directed Internship	Criminology BA
Criminal Justice	Criminology BA
Macro Economics	Criminology BA
Micro Economics	Criminology BA
Contemporary Literature	Criminology BA
Computer Networks II	Criminology BA

Degree(s) Awarded :

Degree(s)	Program Version

Campus Management Page 3 of 30

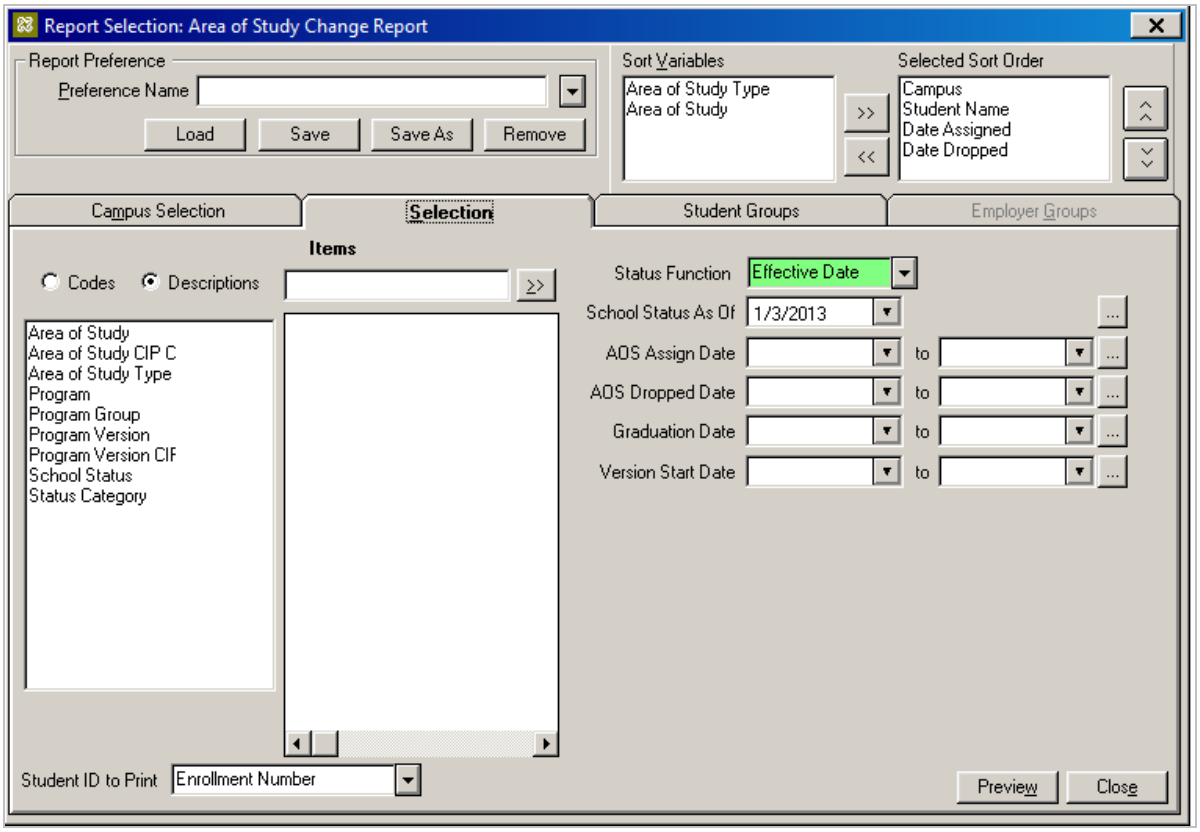
Area of Study Change Report

This report provides a detailed history of changes to a student's Area of Study (AOS) or major, allowing institutions to report these changes to accrediting bodies and helping institutions to determine the number of available enrollment spots and plan for future classroom needs.

To run the report:

1. Navigate to **Reports > Academic Records > Area of Study Change Report**. The Report Selection: Area of Study Change Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Note: The 'Status Function' options are 'Effective Date' and 'Date Added'.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

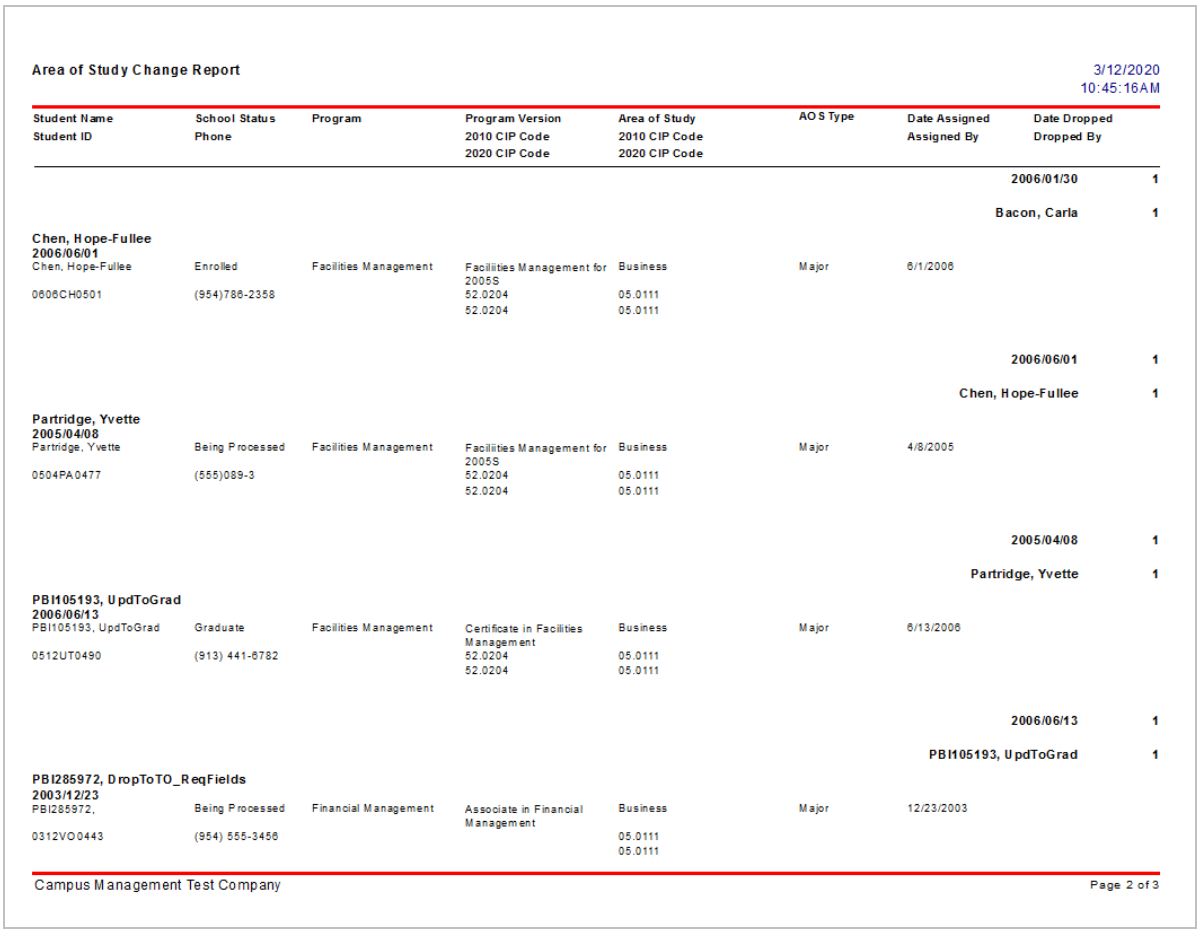
   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Student ID
   - School Status

- Phone
- Program
- Program Version and associated 2010 or 2020 Classification of Instructional Program (CIP) Code
- Area of Study and associated 2010 or 2020 CIP Code
- Area of Study (AOS) Type
- Date Assigned
- Assigned by
- Date Dropped
- Date Dropped By



Area of Study Change Report

3/12/2020
10:45:16AM

Student Name Student ID	School Status Phone	Program	Program Version 2010 CIP Code 2020 CIP Code	Area of Study 2010 CIP Code 2020 CIP Code	AOS Type	Date Assigned Assigned By	Date Dropped Dropped By	
							2006/01/30	**1**
							Bacon, Carla	**1**
Chen, Hope-Fullee **2006/06/01**								
Chen, Hope-Fullee	Enrolled	Facilities Management	Facilities Management for 2005S	Business	Major	6/1/2006		
0606CH0501	(954)788-2358		52.0204 52.0204	05.0111 05.0111				
							2006/06/01	**1**
							Chen, Hope-Fullee	**1**
Partridge, Yvette **2005/04/08**								
Partridge, Yvette	Being Processed	Facilities Management	Facilities Management for 2005S	Business	Major	4/8/2005		
0504PA0477	(555)089-3		52.0204 52.0204	05.0111 05.0111				
							2005/04/08	**1**
							Partridge, Yvette	**1**
PBI105193, UpdToGrad **2006/06/13**								
PBI105193, UpdToGrad	Graduate	Facilities Management	Certificate in Facilities Management	Business	Major	6/13/2006		
0512UT0490	(913) 441-6782		52.0204 52.0204	05.0111 05.0111				
							2006/06/13	**1**
							PBI105193, UpdToGrad	**1**
PBI285972, DropToTO_ReqFields **2003/12/23**								
PBI285972,	Being Processed	Financial Management	Associate in Financial Management	Business	Major	12/23/2003		
0312VO0443	(954) 555-3456			05.0111 05.0111				

Campus Management Test Company

Page 2 of 3

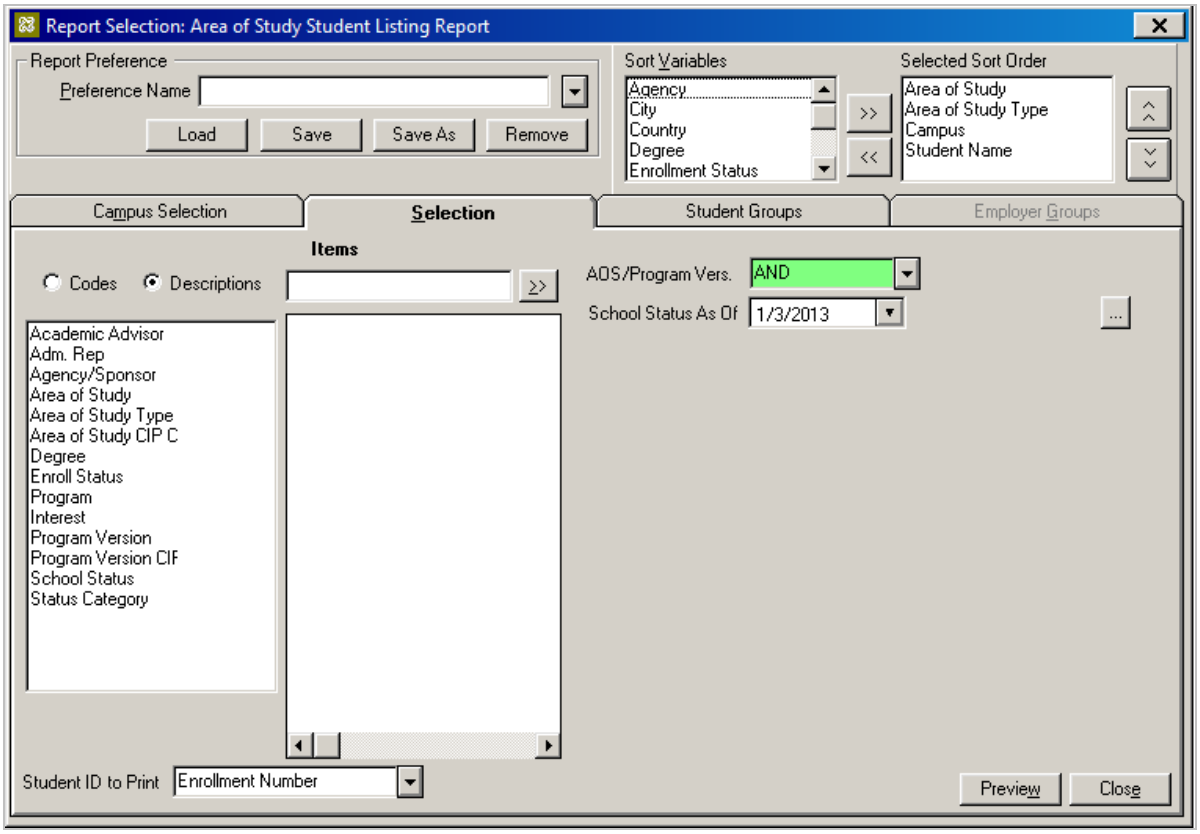
Area of Study Student Listing Report

This report provides basic demographic information about students sorted and filtered by the Area of Study (AOS) and AOS Type.

To run the report:

1. Navigate to **Reports > Academic Records > Area of Study Student Listing Report**. The Report Selection: Area of Study Student Listing Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Note: To display students in both the selected Program Version and AOS, choose the AND option for AOS/Program Vers. To display students in the selected Program Version or selected AOS, choose the OR option. The AND/OR option also applies to Program Version and Major Classification of Instructional Program (CIP) Codes.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

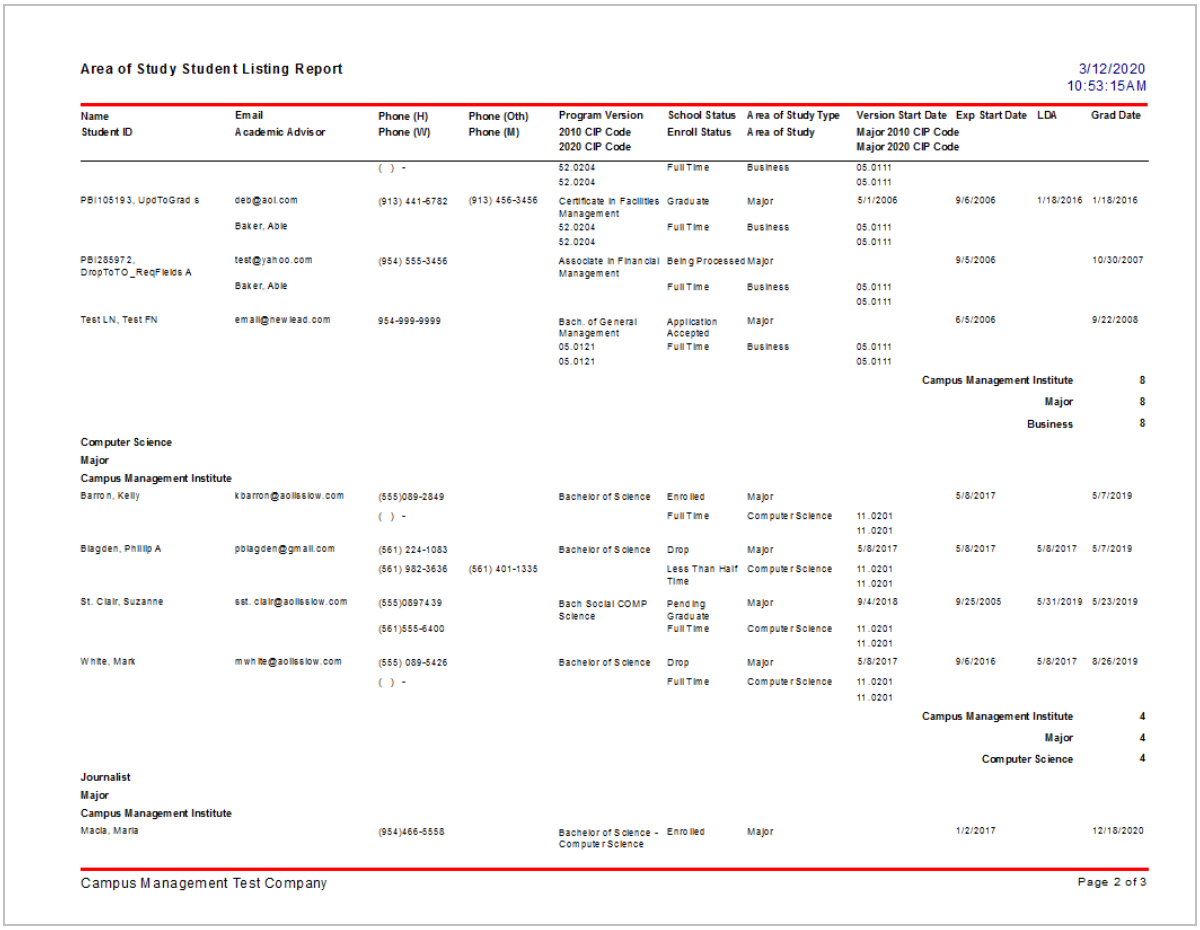
   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Student ID

- Email
- Academic Advisor
- Phone numbers (home, work, mobile and other numbers)
- Program Version
- Program Version and associated 2010 or 2020 Classification of Instructional Program (CIP) Code
- School Status
- Enrollment Status
- Area of Study Type
- Area of Study
- Version Start Date
- Major 2010 or 2020 CIP Code
- Expected Start Date
- Last Date of Attendance (LDA)
- Graduation Date



Area of Study Student Listing Report

3/12/2020
10:53:15AM

Name Student ID	Email Academic Advisor	Phone (H) Phone (W)	Phone (Oth) Phone (M)	Program Version 2010 CIP Code 2020 CIP Code	School Status Enroll Status	Area of Study Type Area of Study	Version Start Date Major 2010 CIP Code Major 2020 CIP Code	Exp Start Date	LDA	Grad Date
		( ) -		52.0204 52.0204	Full Time	Business	05.0111 05.0111			
PBI105193, UpdToGrad s	deb@aol.com	(913) 441-6782	(913) 456-3456	Certificate in Facilities Management	Graduate	Major	5/1/2006	9/6/2006	1/18/2016	1/18/2016
	Baker, Able			52.0204 52.0204	Full Time	Business	05.0111 05.0111			
PBI285972, DropToTO_ReqFields A	test@yahoo.com	(954) 555-3456		Associate in Financial Management	Being Processed	Major		9/5/2006		10/30/2007
	Baker, Able				Full Time	Business	05.0111 05.0111			
Test LN, Test FN	email@newlead.com	954-999-9999		Bach. of General Management	Application Accepted	Major		6/5/2006		9/22/2008
				05.0121 05.0121	Full Time	Business	05.0111 05.0111			
								Campus Management Institute		8
									Major	8
									Business	8
Computer Science **Major** **Campus Management Institute**										
Barron, Kelly	kbarron@aollisslow.com	(555)089-2849		Bachelor of Science	Enrolled	Major		5/8/2017		5/7/2019
		( ) -			Full Time	Computer Science	11.0201 11.0201			
Blagden, Phillip A	pblagden@gmail.com	(561) 224-1083		Bachelor of Science	Drop	Major	5/8/2017	5/8/2017	5/8/2017	5/7/2019
		(561) 982-3636	(561) 401-1335		Less Than Half Time	Computer Science	11.0201 11.0201			
St. Clair, Suzanne	sst. clair@aollisslow.com	(555)0897439		Bach Social COMP Science	Pending Graduate	Major	9/4/2018	9/25/2005	5/31/2019	5/23/2019
		(561)555-6400			Full Time	Computer Science	11.0201 11.0201			
White, Mark	mwhite@aollisslow.com	(555) 089-5426		Bachelor of Science	Drop	Major	5/8/2017	9/6/2016	5/8/2017	8/26/2019
		( ) -			Full Time	Computer Science	11.0201 11.0201			
								Campus Management Institute		4
									Major	4
									Computer Science	4
Journalist **Major** **Campus Management Institute**										
Macia, Maria		(954)466-5558		Bachelor of Science - Computer Science	Enrolled	Major		1/2/2017		12/18/2020

Campus Management Test Company

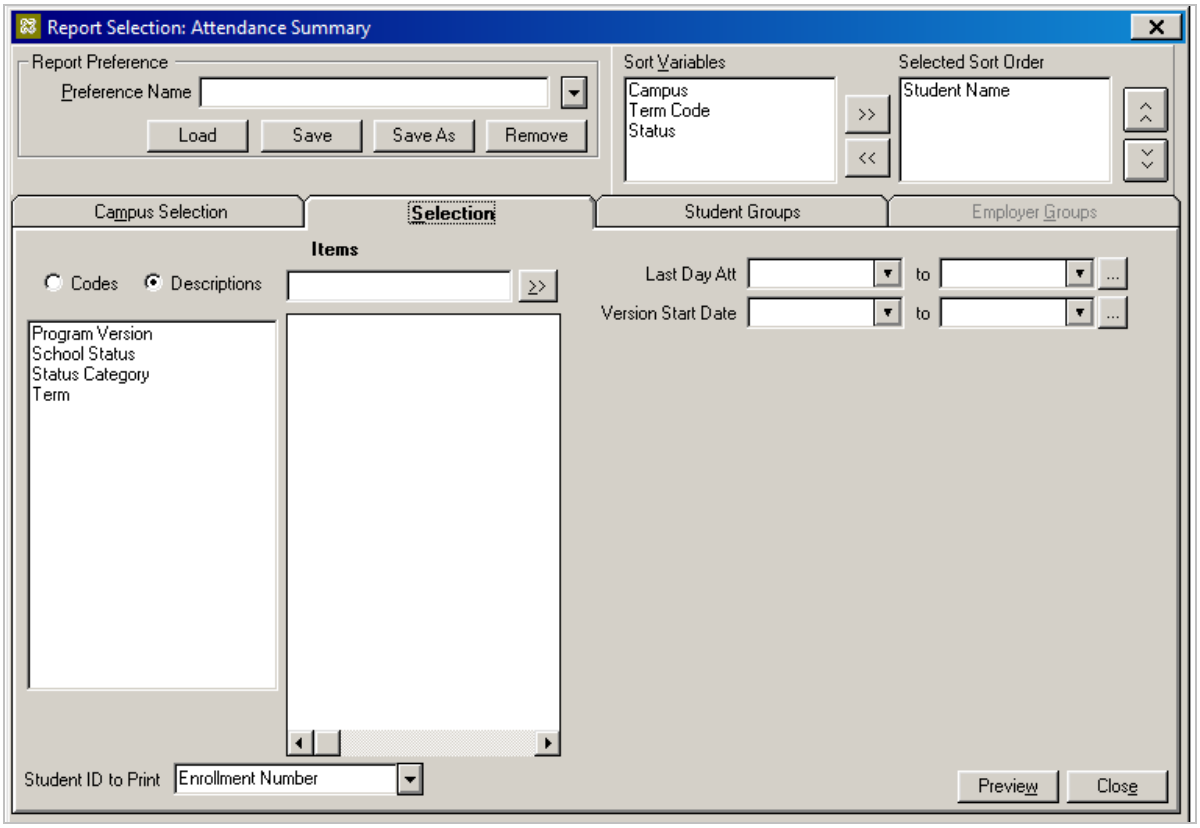
Page 2 of 3

Attendance Summary

This report lists a summary of attendance for each student.

To run the report:

1. Navigate to **Reports > Academic Records > Attendance Summary**. The Report Selection: Attendance Summary form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

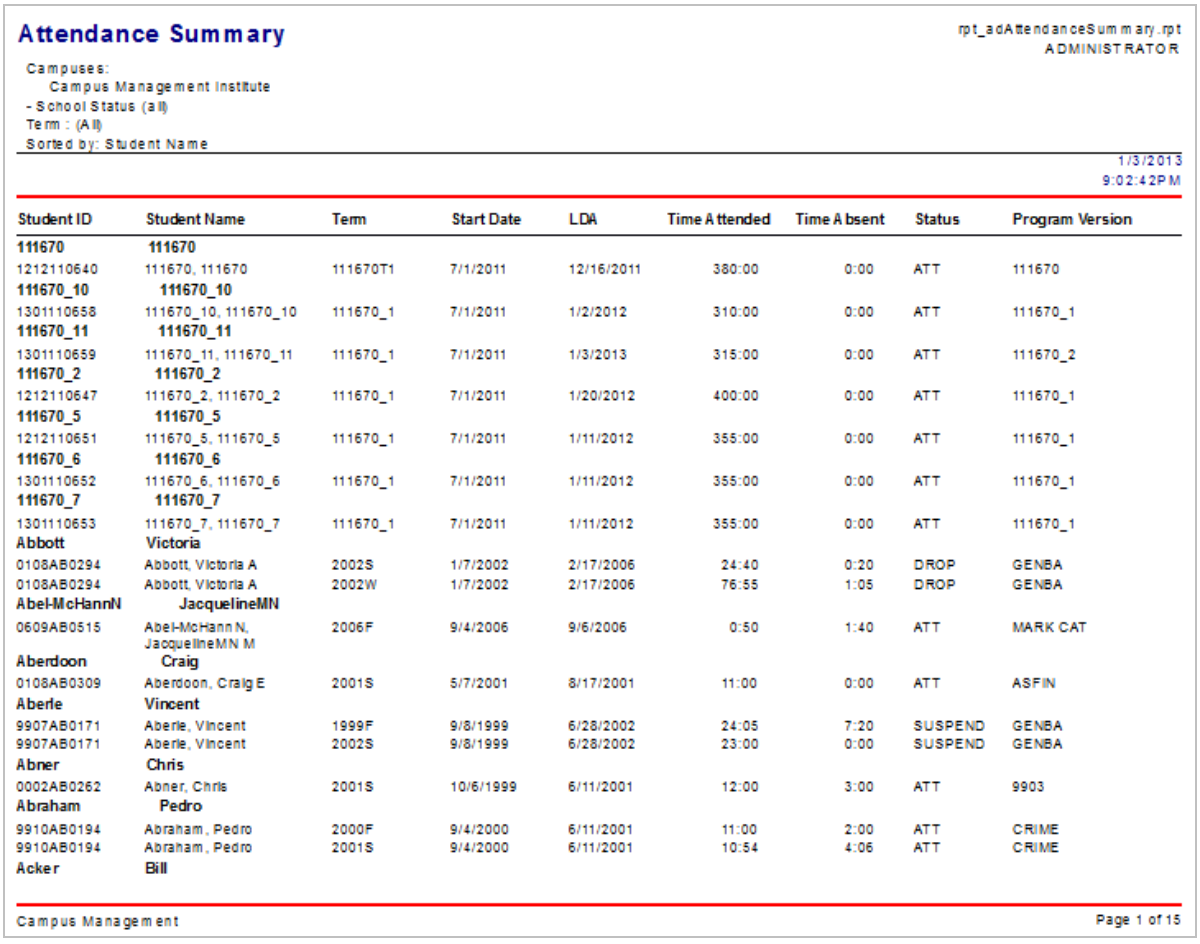
   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student ID
   - Student Name
   - Term Code
   - Start Date
   - Last Date of Attendance (LDA)
   - Time Attended
   - Time Absent

- Status
- Program Version



Attendance Summary

rpt_adAttendanceSummary.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- School Status (all)
Term : (All)
Sorted by: Student Name

1/3/2013
9:02:42PM

Student ID	Student Name	Term	Start Date	LDA	Time Attended	Time Absent	Status	Program Version
111670	**111670**							
1212110640	111670, 111670	111670T1	7/1/2011	12/16/2011	380:00	0:00	ATT	111670
111670_10	**111670_10**							
1301110658	111670_10, 111670_10	111670_1	7/1/2011	1/2/2012	310:00	0:00	ATT	111670_1
111670_11	**111670_11**							
1301110659	111670_11, 111670_11	111670_1	7/1/2011	1/3/2013	315:00	0:00	ATT	111670_2
111670_2	**111670_2**							
1212110647	111670_2, 111670_2	111670_1	7/1/2011	1/20/2012	400:00	0:00	ATT	111670_1
111670_5	**111670_5**							
1212110651	111670_5, 111670_5	111670_1	7/1/2011	1/11/2012	355:00	0:00	ATT	111670_1
111670_6	**111670_6**							
1301110652	111670_6, 111670_6	111670_1	7/1/2011	1/11/2012	355:00	0:00	ATT	111670_1
111670_7	**111670_7**							
1301110653	111670_7, 111670_7	111670_1	7/1/2011	1/11/2012	355:00	0:00	ATT	111670_1
Abbott	**Victoria**							
0108AB0294	Abbott, Victoria A	2002S	1/7/2002	2/17/2006	24:40	0:20	DROP	GENBA
0108AB0294	Abbott, Victoria A	2002W	1/7/2002	2/17/2006	76:55	1:05	DROP	GENBA
Abel-McHannN	**JacquelineMN**							
0609AB0515	Abel-McHann N, JacquelineMN M	2006F	9/4/2006	9/6/2006	0:50	1:40	ATT	MARK CAT
Aberdoon	**Craig**							
0108AB0309	Aberdoon, Craig E	2001S	5/7/2001	8/17/2001	11:00	0:00	ATT	ASFIN
Aberle	**Vincent**							
9907AB0171	Aberle, Vincent	1999F	9/8/1999	6/28/2002	24:05	7:20	SUSPEND	GENBA
9907AB0171	Aberle, Vincent	2002S	9/8/1999	6/28/2002	23:00	0:00	SUSPEND	GENBA
Abner	**Chris**							
0002AB0262	Abner, Chris	2001S	10/6/1999	6/11/2001	12:00	3:00	ATT	9903
Abraham	**Pedro**							
9910AB0194	Abraham, Pedro	2000F	9/4/2000	6/11/2001	11:00	2:00	ATT	CRIME
9910AB0194	Abraham, Pedro	2001S	9/4/2000	6/11/2001	10:54	4:06	ATT	CRIME
Acker	**Bill**							

Campus Management
Page 1 of 15

Attendance Summary by Program for Clock Hour

This report has been developed specifically for institutions that measure students' progress in clock-hours to calculate their progress in an academic program. The institution can see the percentage of program hours completed to date, or as of a specific date, compared to the required attended hours the student has completed according to the selection criteria of the report.

The report enables the institution to monitor and report on a student's rate of progress at a campus or in a specific program by analyzing the progress the student is making and the rate of the student's progress based on the selected variables in the report.

The report allows a user to review a student's attendance for a given program.

The user can also run the report for a specific group of students using a pre-defined Student Group, such as for students who have completed:

- In between specific percentages of their program
- Less than a specific percentage of their program
- Equal to a specific percentage of their program
- Specified percentage of their program at a certain date
- Greater than a specific percentage of their program

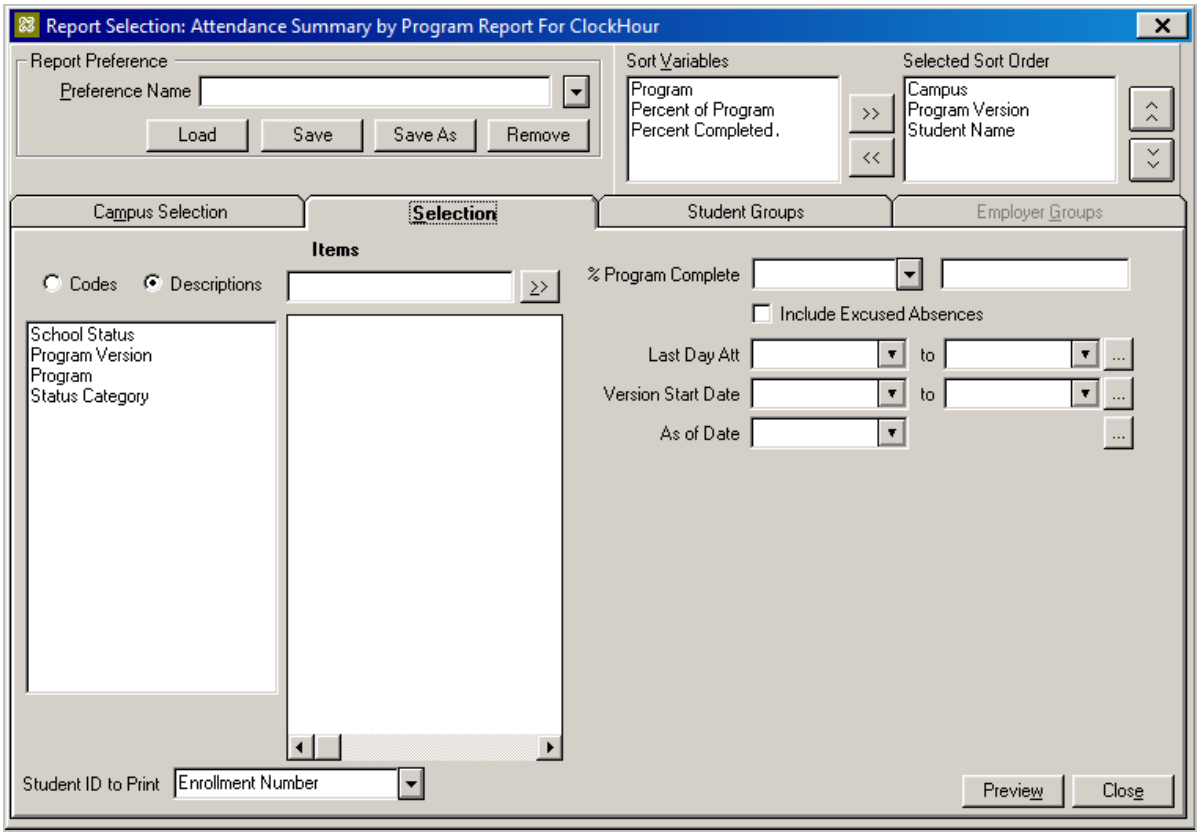
The report can be run on students by a Program Version Start Date range or the Last Date of Attendance (LDA) date range.

The user can search for a specific Student Group by entering various search criteria. The system will scan for records matching the search criteria and then focus on the first one it finds matching the search criteria. When the user selects the record, the system displays the student master for the selected student record. The user can continue the search by selecting the Next record. The user can also select a Group heading that matches the search criteria, such as Student Group or Employer Group. This action creates a new Results tab which displays the selected group's records.

To run the report:

1. Navigate to **Reports > Academic Records > Attendance Summary by Program for Clock Hour**. The Report Selection: Attendance Summary by Program for Clock Hour form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Note: The 'As of Date' defaults to today's date. This date is used to gather attended hours and scheduled hours. If the 'As Of' date is left blank in the selection criteria, the students in a program version configured to Use Scheduled Hours will have the Hours Scheduled field = ((attend + absent) – makeup), up to the Last Date (positive or absent) Attendance was posted. Students who are in a clock hour program version that is not configured to Use Scheduled Hours will have the Hours Scheduled field = ((attend + absent) – makeup), up to the present date.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

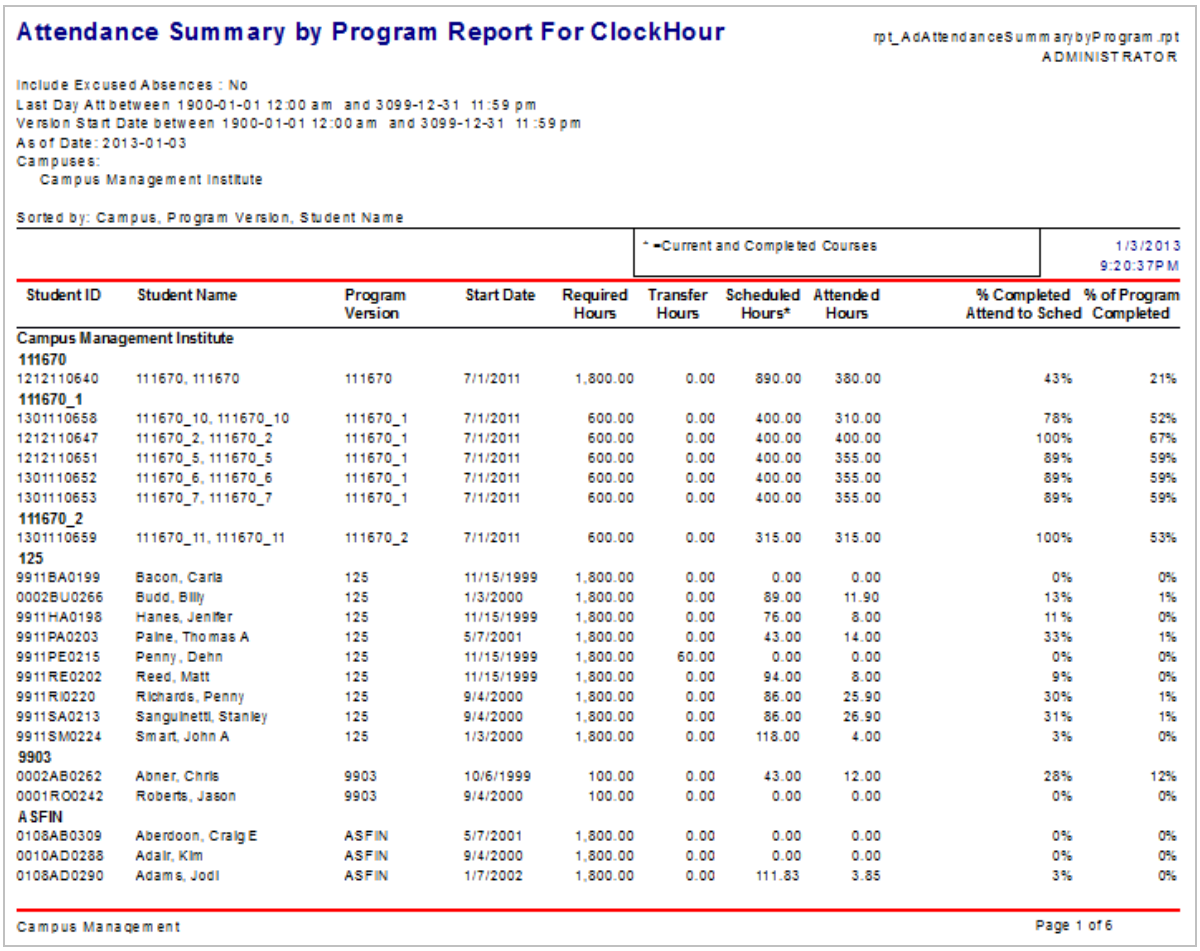
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student ID
   - Student Name
   - Program Version
   - Start Date
   - Required Hours (hours which come from the student's enrollment folder)
   - Transfer Hours (hours that have been accumulated by the student at a different institution)
   - Scheduled Hours (scheduled period hours for Current and Completed courses only)
   - Excused Hours (summation of absent hours)
     This field is used when Excused Absent is selected in the Report Selection form; if it is not selected, then the field is hidden. If Excused Absent is selected in the Report Selection form, then Scheduled Hours, Attended Hours, % Completed Attend to Sched. and % of Program Completed will include Excused Absent Hours.
   - Attended Hours (hours earned by a student before LOA was activated)

For an enrollment that contains an Associated Course, the Attended Hours will be calculated for each enrollment. Attended hours exclude hours earned by a student in a Failed or Dropped course.

- % Completed Attended to Scheduled (comparison of Attended Hours to Scheduled Hours).
- % of Program Completed (comparison of the Attended Hours to the Program Version Required Hours - Transfer Hours).



Attendance Summary by Program Report For ClockHour

rpt_AdAttendanceSummarybyProgram.rpt
ADMINISTRATOR

Include Excused Absences : No
Last Day Att between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Version Start Date between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
As of Date: 2013-01-03
Campuses:
Campus Management Institute

Sorted by: Campus, Program Version, Student Name

* =Current and Completed Courses

1/3/2013 9:20:37 PM

Student ID	Student Name	Program Version	Start Date	Required Hours	Transfer Hours	Scheduled Hours*	Attended Hours	% Completed Attend to Sched	% of Program Completed
Campus Management Institute									
111670									
1212110640	111670, 111670	111670	7/1/2011	1,800.00	0.00	890.00	380.00	43%	21%
111670_1									
1301110658	111670_10, 111670_10	111670_1	7/1/2011	600.00	0.00	400.00	310.00	78%	52%
1212110647	111670_2, 111670_2	111670_1	7/1/2011	600.00	0.00	400.00	400.00	100%	67%
1212110651	111670_5, 111670_5	111670_1	7/1/2011	600.00	0.00	400.00	355.00	89%	59%
1301110652	111670_6, 111670_6	111670_1	7/1/2011	600.00	0.00	400.00	355.00	89%	59%
1301110653	111670_7, 111670_7	111670_1	7/1/2011	600.00	0.00	400.00	355.00	89%	59%
111670_2									
1301110659	111670_11, 111670_11	111670_2	7/1/2011	600.00	0.00	315.00	315.00	100%	53%
125									
9911BA0199	Bacon, Carla	125	11/15/1999	1,800.00	0.00	0.00	0.00	0%	0%
0002BU0266	Budd, Billy	125	1/3/2000	1,800.00	0.00	89.00	11.90	13%	1%
9911HA0198	Hanes, Jenifer	125	11/15/1999	1,800.00	0.00	76.00	8.00	11%	0%
9911PA0203	Paine, Thomas A	125	5/7/2001	1,800.00	0.00	43.00	14.00	33%	1%
9911PE0215	Penny, Dehn	125	11/15/1999	1,800.00	60.00	0.00	0.00	0%	0%
9911RE0202	Reed, Matt	125	11/15/1999	1,800.00	0.00	94.00	8.00	9%	0%
9911RI0220	Richards, Penny	125	9/4/2000	1,800.00	0.00	86.00	25.90	30%	1%
9911SA0213	Sanguinetti, Stanley	125	9/4/2000	1,800.00	0.00	86.00	26.90	31%	1%
9911SM0224	Smart, John A	125	1/3/2000	1,800.00	0.00	118.00	4.00	3%	0%
9903									
0002AB0262	Abner, Chris	9903	10/6/1999	100.00	0.00	43.00	12.00	28%	12%
0001RO0242	Roberts, Jason	9903	9/4/2000	100.00	0.00	0.00	0.00	0%	0%
ASFIN									
0108AB0309	Aberdoon, Craig E	ASFIN	5/7/2001	1,800.00	0.00	0.00	0.00	0%	0%
0010AD0288	Adair, Kim	ASFIN	9/4/2000	1,800.00	0.00	0.00	0.00	0%	0%
0108AD0290	Adams, Jodi	ASFIN	1/7/2002	1,800.00	0.00	111.83	3.85	3%	0%

Campus Management

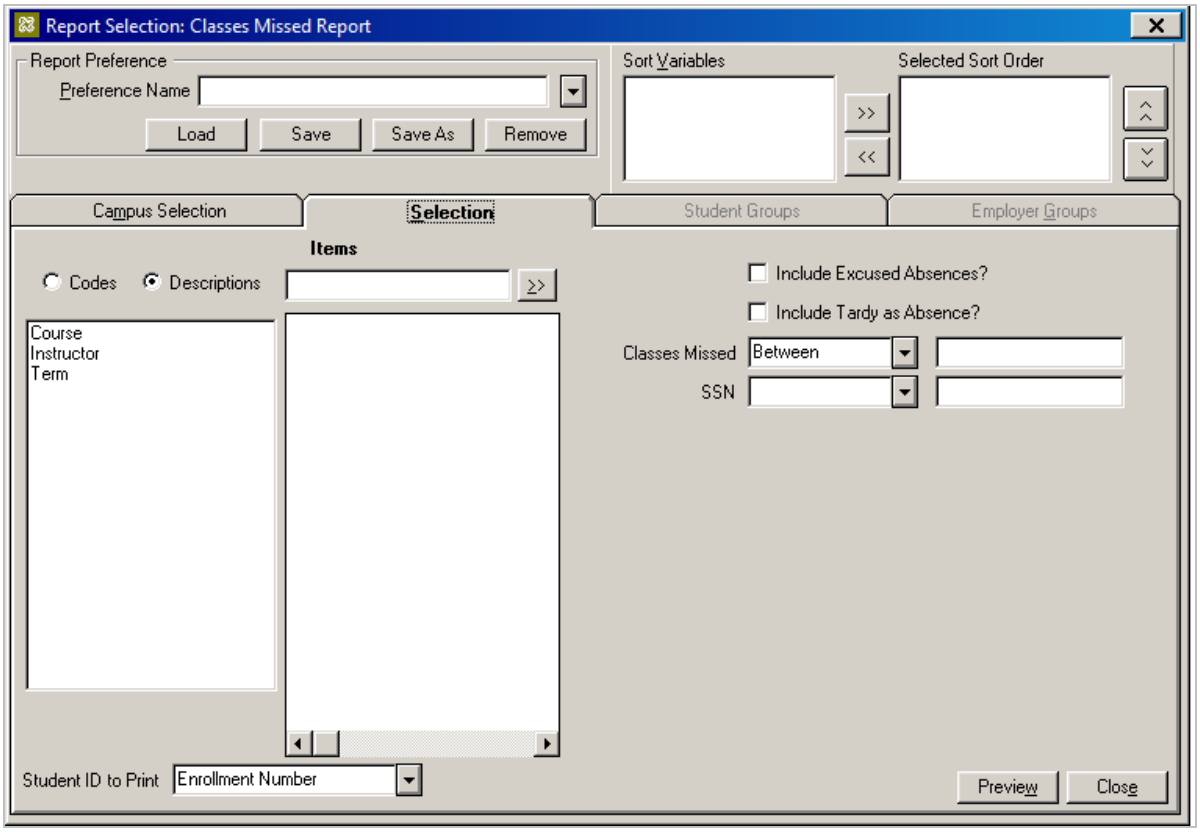
Page 1 of 6

Classes Missed Report

This report lists students that have been absent from class for a specified number of class sessions.

To run the report:

1. Navigate to **Reports > Academic Records > Classes Missed Report**. The Report Selection: Classes Missed Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

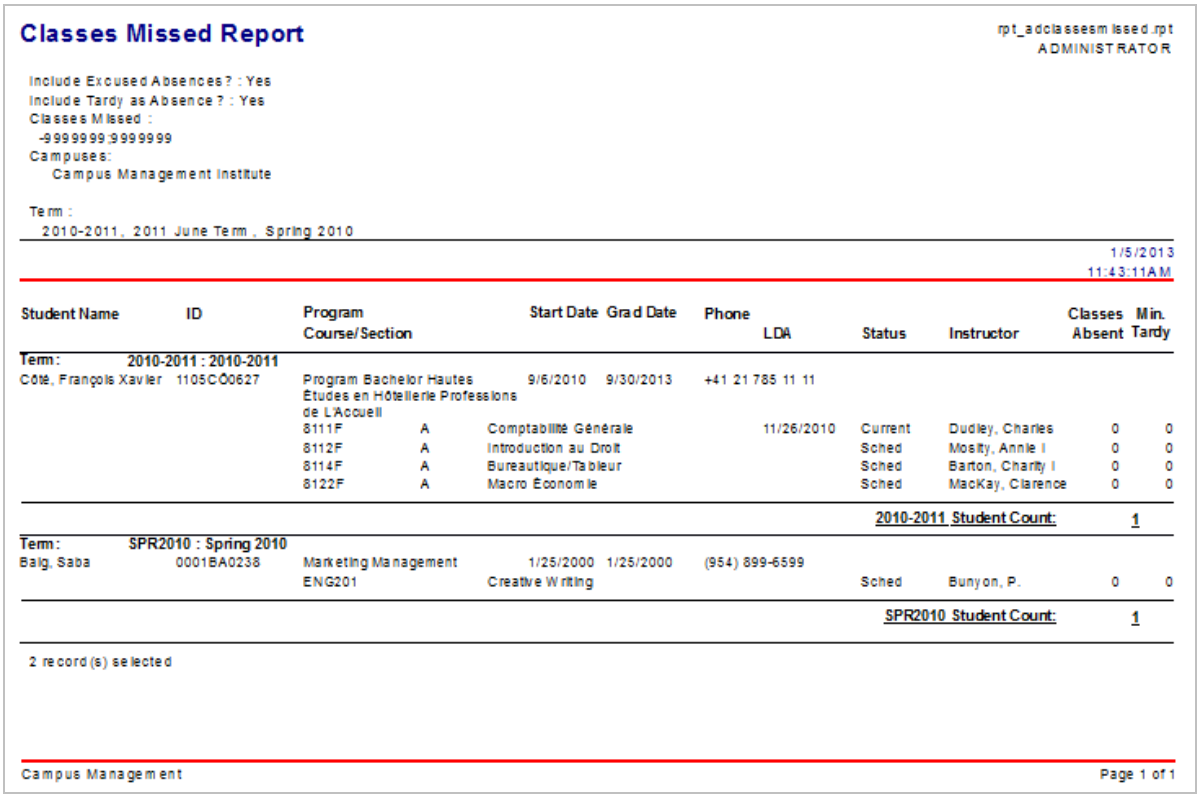


4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Student ID
   - Program
   - Course/Section
   - Start Date
   - Graduation Date
   - Student Phone Number
   - Last Date of Attendance
   - Status
   - Instructor

- Classes Absent
- Min. Tardy



Classes Missed Report

rpt_adclassesmissed.rpt
ADMINISTRATOR

Include Excused Absences? : Yes
Include Tardy as Absence? : Yes
Classes Missed :
-9999999;9999999
Campuses:
Campus Management Institute

Term :
2010-2011, 2011 June Term, Spring 2010

1/5/2013
11:43:11AM

Student Name	ID	Program / Course/Section			Start Date	Grad Date	Phone / LDA	Status	Instructor	Classes Absent	Min. Tardy
Term:	**2010-2011 : 2010-2011**										
Côté, François Xavier	1105CÔ0627	Program Bachelor Hautes Études en Hôtellerie Professions de L'Accueil			9/6/2010	9/30/2013	+41 21 785 11 11				
		8111F	A	Comptabilité Générale			11/26/2010	Current	Dudley, Charles	0	0
		8112F	A	Introduction au Droit				Sched	Mosity, Annie I	0	0
		8114F	A	Bureautique/Tableur				Sched	Barton, Charity I	0	0
		8122F	A	Macro Économie				Sched	MacKay, Clarence	0	0
									2010-2011 Student Count:		**1**
Term:	**SPR2010 : Spring 2010**										
Balg, Saba	0001BA0238	Marketing Management			1/25/2000	1/25/2000	(954) 899-6599				
		ENG201		Creative Writing				Sched	Bunyon, P.	0	0
									SPR2010 Student Count:		**1**

2 record(s) selected

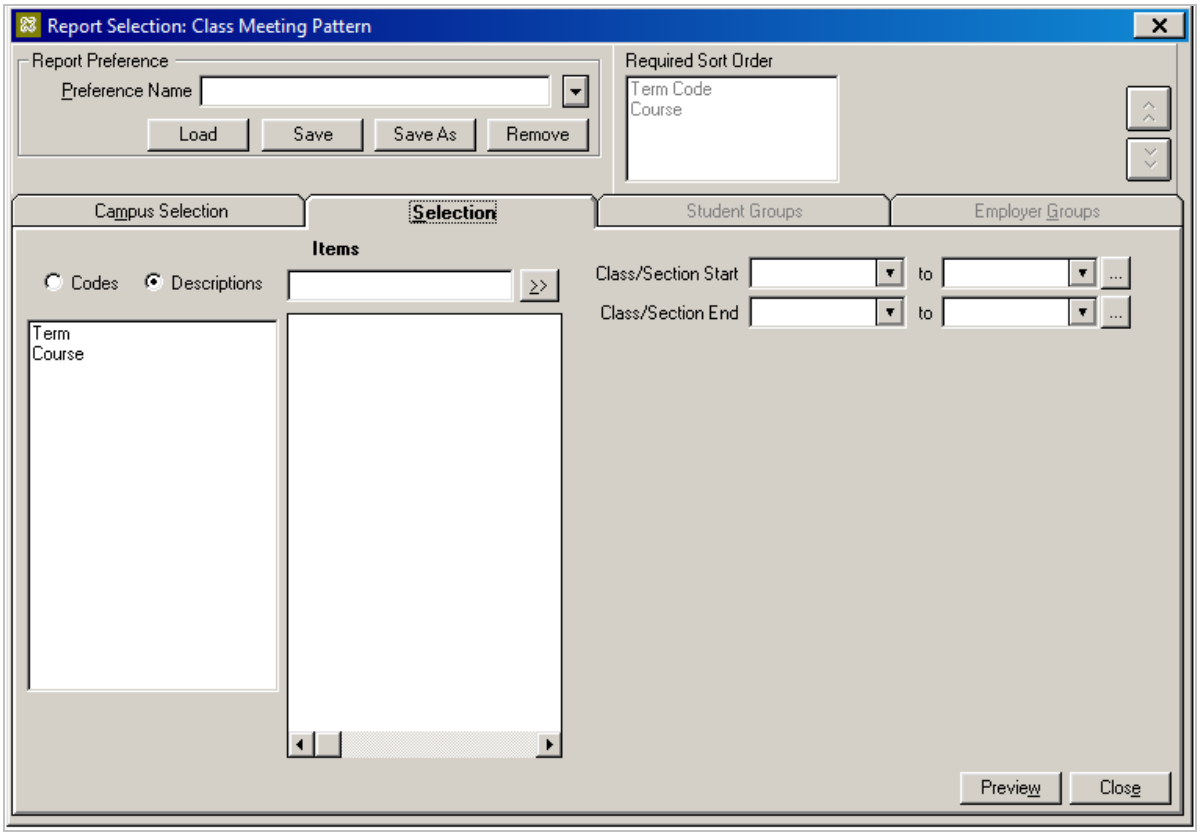
Campus Management
Page 1 of 1

Class Meeting Pattern

This report displays the meeting patterns associated with a class schedule.

To run the report:

1. Navigate to **Reports > Academic Records > Class Meeting Pattern**. The Report Selection: Class Meeting Pattern form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

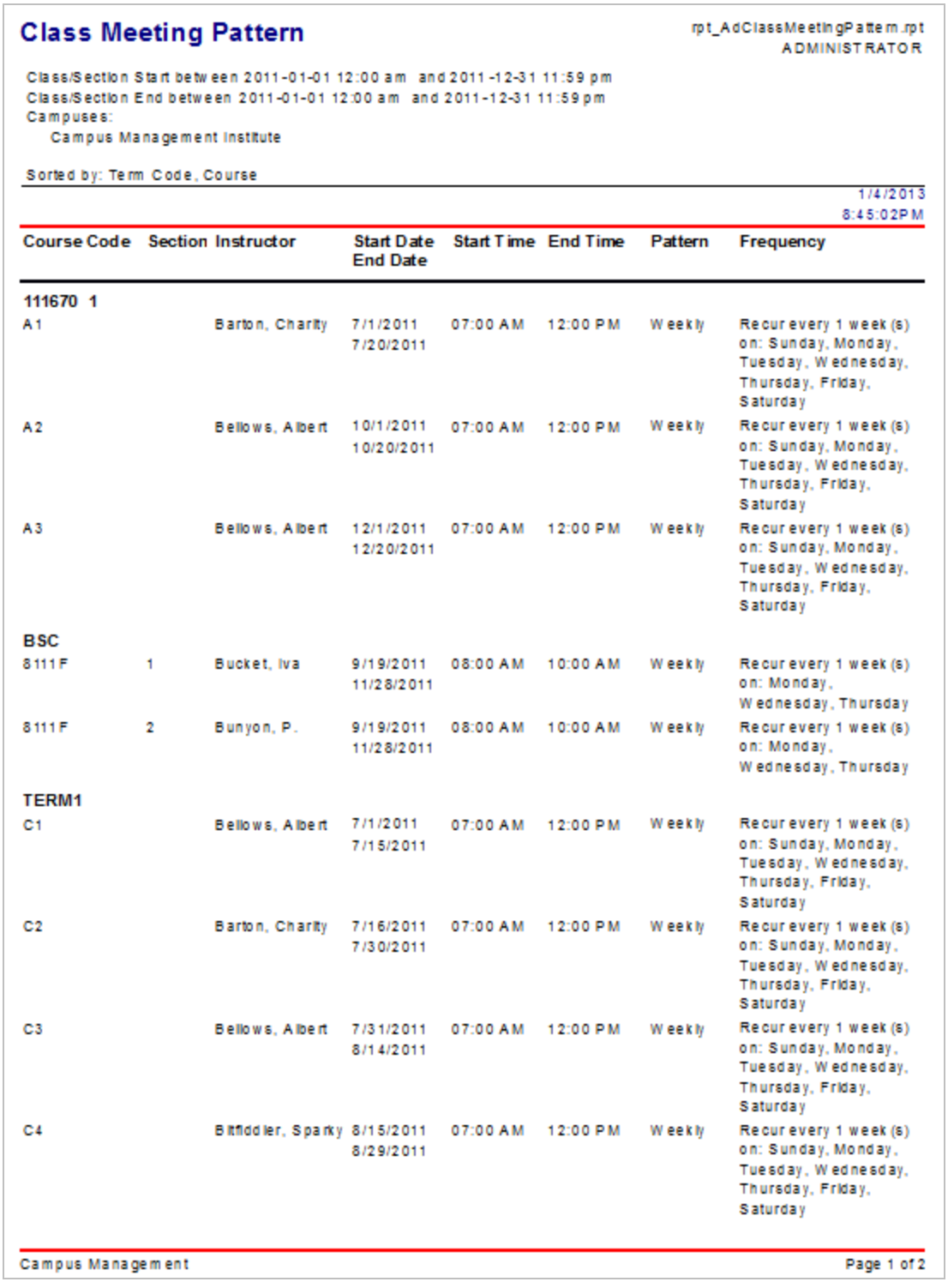


4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Course Code
   - Section
   - Instructor
   - Start and End Date
   - Start and End Time
   - Pattern

- Frequency



Class Meeting Pattern

rpt_AdClassMeetingPattern.rpt
ADMINISTRATOR

Class/Section Start between 2011-01-01 12:00 am and 2011-12-31 11:59 pm
Class/Section End between 2011-01-01 12:00 am and 2011-12-31 11:59 pm
Campuses:
Campus Management Institute

Sorted by: Term Code, Course

1/4/2013
8:45:02PM

Course Code	Section	Instructor	Start Date End Date	Start Time	End Time	Pattern	Frequency
111670 1							
A1		Barton, Charity	7/1/2011 7/20/2011	07:00 AM	12:00 PM	Weekly	Recur every 1 week(s) on: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday
A2		Bellows, Albert	10/1/2011 10/20/2011	07:00 AM	12:00 PM	Weekly	Recur every 1 week(s) on: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday
A3		Bellows, Albert	12/1/2011 12/20/2011	07:00 AM	12:00 PM	Weekly	Recur every 1 week(s) on: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday
BSC							
8111F	1	Bucket, Iva	9/19/2011 11/28/2011	08:00 AM	10:00 AM	Weekly	Recur every 1 week(s) on: Monday, Wednesday, Thursday
8111F	2	Bunyon, P.	9/19/2011 11/28/2011	08:00 AM	10:00 AM	Weekly	Recur every 1 week(s) on: Monday, Wednesday, Thursday
TERM1							
C1		Bellows, Albert	7/1/2011 7/15/2011	07:00 AM	12:00 PM	Weekly	Recur every 1 week(s) on: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday
C2		Barton, Charity	7/16/2011 7/30/2011	07:00 AM	12:00 PM	Weekly	Recur every 1 week(s) on: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday
C3		Bellows, Albert	7/31/2011 8/14/2011	07:00 AM	12:00 PM	Weekly	Recur every 1 week(s) on: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday
C4		Bitfiddler, Sparky	8/15/2011 8/29/2011	07:00 AM	12:00 PM	Weekly	Recur every 1 week(s) on: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday

Campus Management
Page 1 of 2

Class Rank

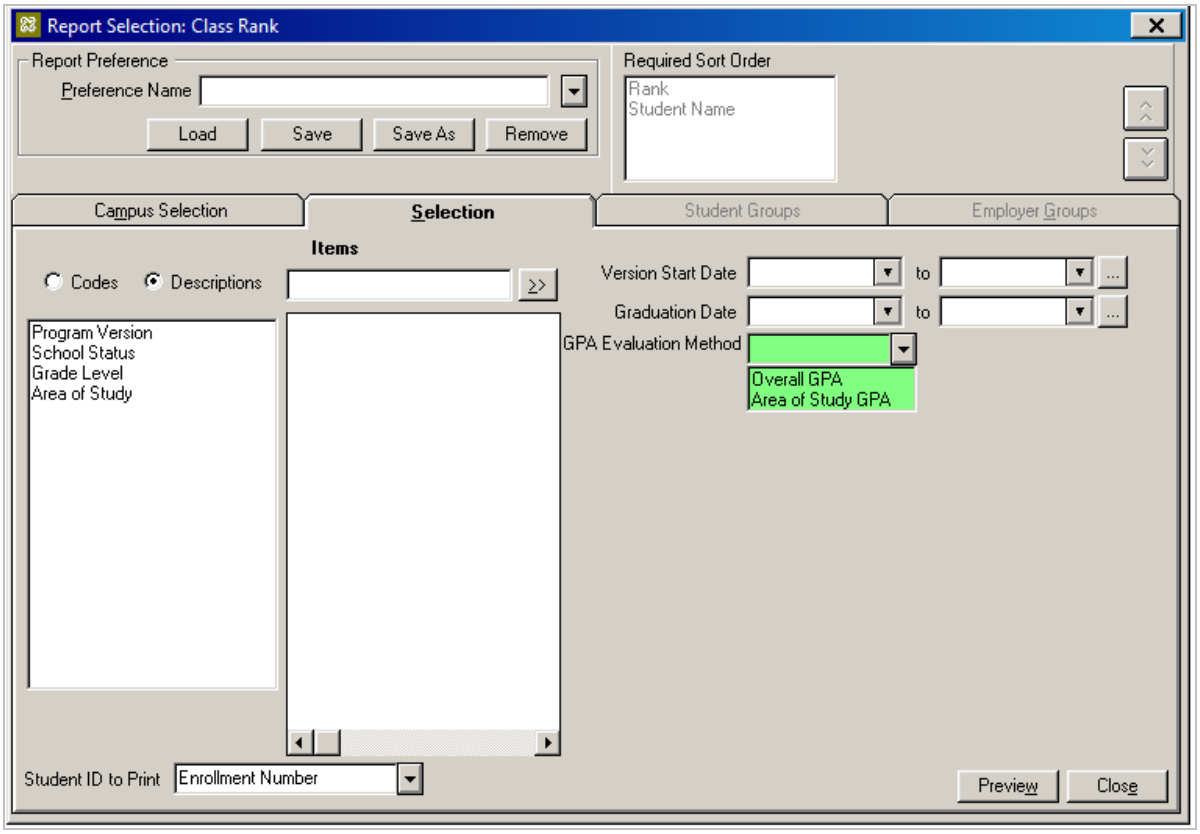
This report displays a list of students ranked according to their Grade Point Averages (GPAs) for a particular course program or the area of study.

To run the report:

1. Navigate to **Reports > Academic Records > Class Rank**. The Report Selection: Class Rank form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   You can select one of the following two methods to evaluate GPAs:

   - **Overall GPA**: Select this method to evaluate students' rankings based on the GPA for the selected course programs taken by the student.
   - **Area of Study GPA**: Select this method to evaluate students' rankings based on the GPA for the selected area of study. If a student has more than one area of study, the student name will appear twice in the report.

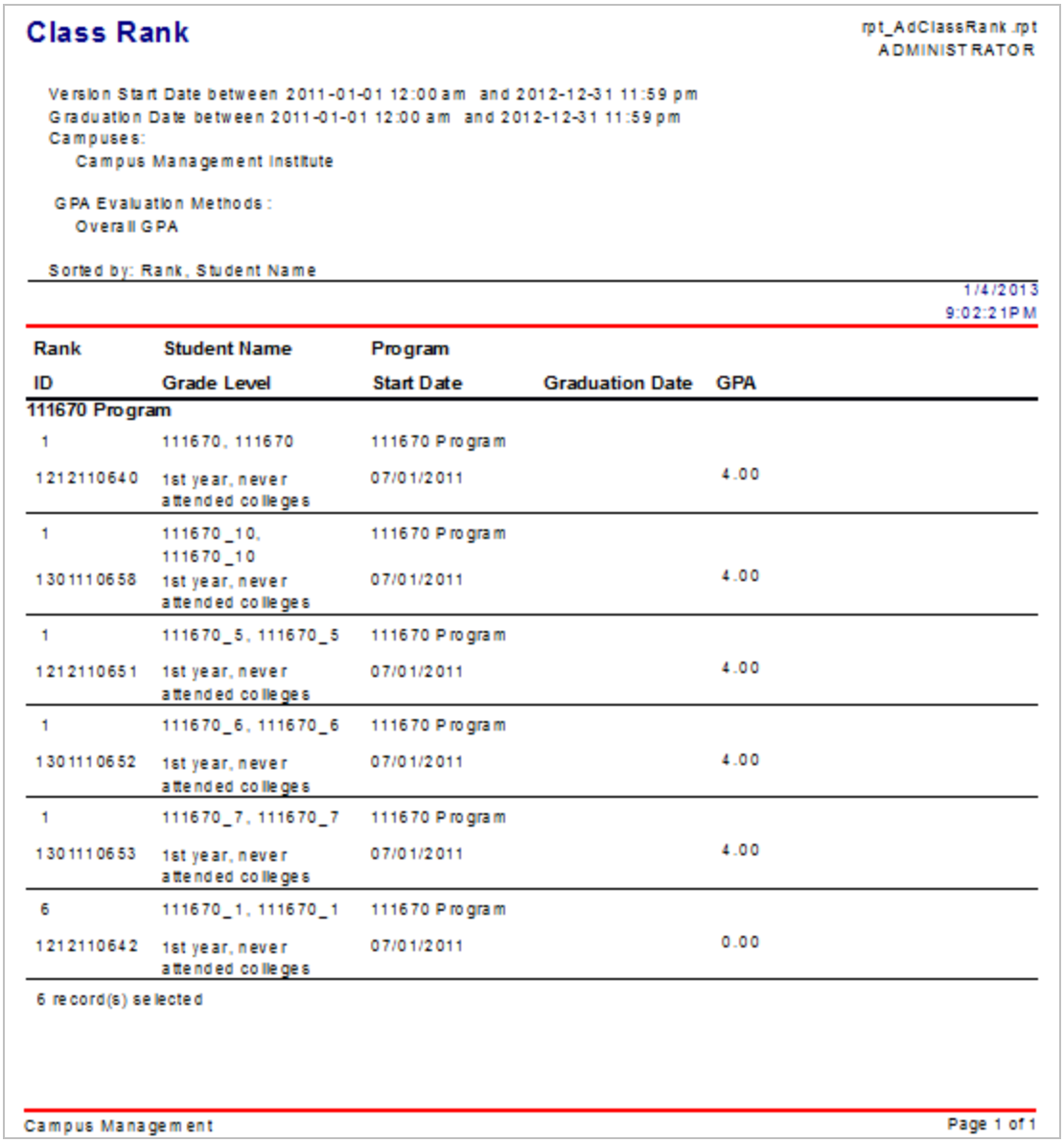


4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Rank
   - ID
   - Student Name

- Grade Level
- Program
- Start Date
- Graduation Date
- GPA (computed on the basis of the GPA evaluation method specified in the selection criteria)



Class Rank

rpt_AdClassRank.rpt
ADMINISTRATOR

Version Start Date between 2011-01-01 12:00 am and 2012-12-31 11:59 pm
Graduation Date between 2011-01-01 12:00 am and 2012-12-31 11:59 pm
Campuses:
Campus Management Institute

GPA Evaluation Methods:
Overall GPA

Sorted by: Rank, Student Name

1/4/2013
9:02:21 PM

Rank	Student Name	Program		
ID	Grade Level	Start Date	Graduation Date	GPA
111670 Program				
1	111670, 111670	111670 Program		
1212110640	1st year, never attended colleges	07/01/2011		4.00
1	111670_10, 111670_10	111670 Program		
1301110658	1st year, never attended colleges	07/01/2011		4.00
1	111670_5, 111670_5	111670 Program		
1212110651	1st year, never attended colleges	07/01/2011		4.00
1	111670_6, 111670_6	111670 Program		
1301110652	1st year, never attended colleges	07/01/2011		4.00
1	111670_7, 111670_7	111670 Program		
1301110653	1st year, never attended colleges	07/01/2011		4.00
6	111670_1, 111670_1	111670 Program		
1212110642	1st year, never attended colleges	07/01/2011		0.00

6 record(s) selected

Campus Management
Page 1 of 1

Note: You can create a Student Group based on the (Academic) Enrollment Grade Level from the Class Rank report.

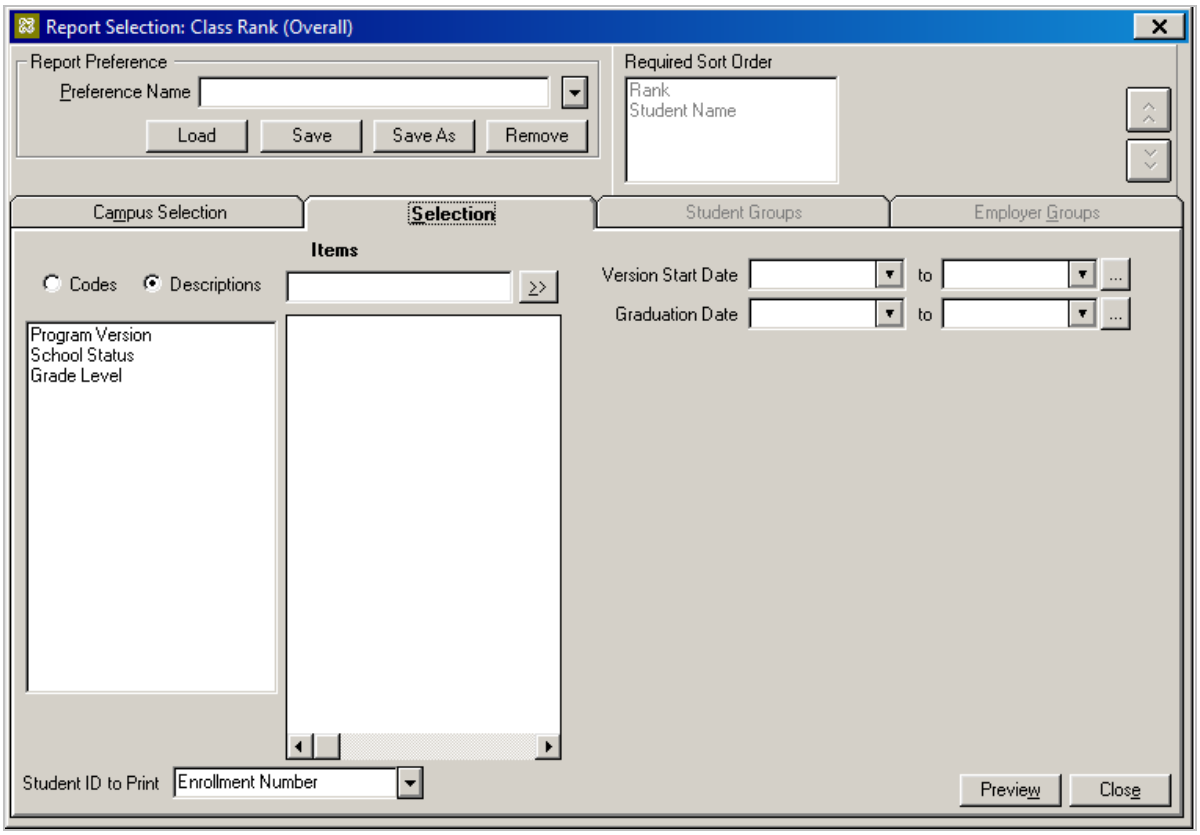
Class Rank (Overall)

This report displays a list of students ranked according to their GPA for all courses taken in a particular campus.

The selection criteria and sort variables for this report are same as for the Class Rank report. The only difference between the reports is that unlike the Class Rank report, this report does not include the criteria for specifying a GPA evaluation method to rank students.

To run the report:

1. Navigate to **Reports > Academic Records > Class Rank (Overall)**. The Report Selection: Class Rank (Overall) form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

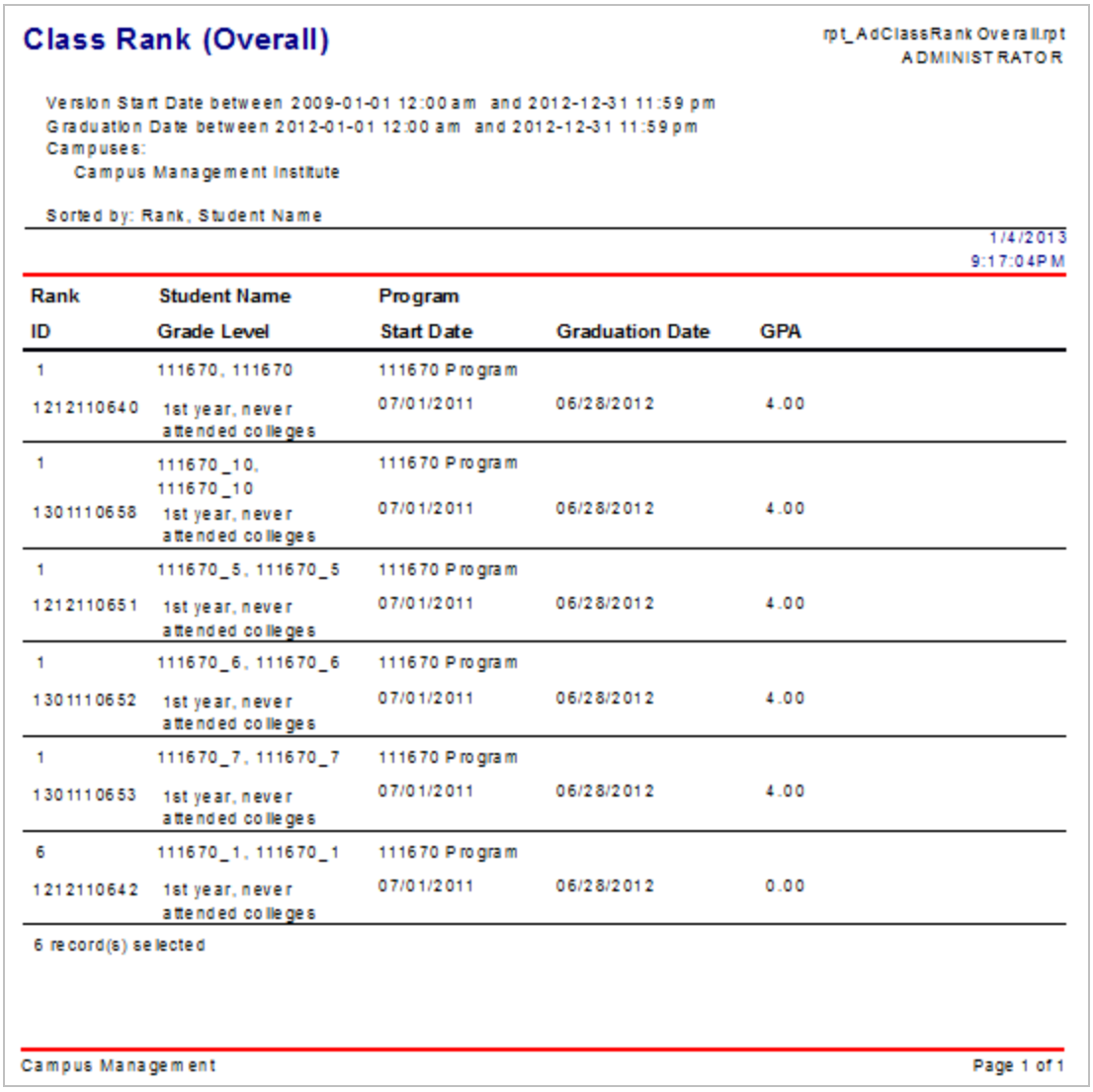


4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Rank
   - ID
   - Student Name
   - Grade Level
   - Program
   - Start Date

- Graduation Date
- GPA (computed on the basis of the averages of all courses specified by the student)



Class Rank (Overall)

rpt_AdClassRankOverall.rpt
ADMINISTRATOR

Version Start Date between 2009-01-01 12:00 am and 2012-12-31 11:59 pm
Graduation Date between 2012-01-01 12:00 am and 2012-12-31 11:59 pm
Campuses:
Campus Management Institute

Sorted by: Rank, Student Name

1/4/2013
9:17:04PM

Rank	Student Name	Program		
ID	Grade Level	Start Date	Graduation Date	GPA
1	111670, 111670	111670 Program		
1212110640	1st year, never attended colleges	07/01/2011	06/28/2012	4.00
1	111670_10, 111670_10	111670 Program		
1301110658	1st year, never attended colleges	07/01/2011	06/28/2012	4.00
1	111670_5, 111670_5	111670 Program		
1212110651	1st year, never attended colleges	07/01/2011	06/28/2012	4.00
1	111670_6, 111670_6	111670 Program		
1301110652	1st year, never attended colleges	07/01/2011	06/28/2012	4.00
1	111670_7, 111670_7	111670 Program		
1301110653	1st year, never attended colleges	07/01/2011	06/28/2012	4.00
6	111670_1, 111670_1	111670 Program		
1212110642	1st year, never attended colleges	07/01/2011	06/28/2012	0.00

6 record(s) selected

Campus Management Page 1 of 1

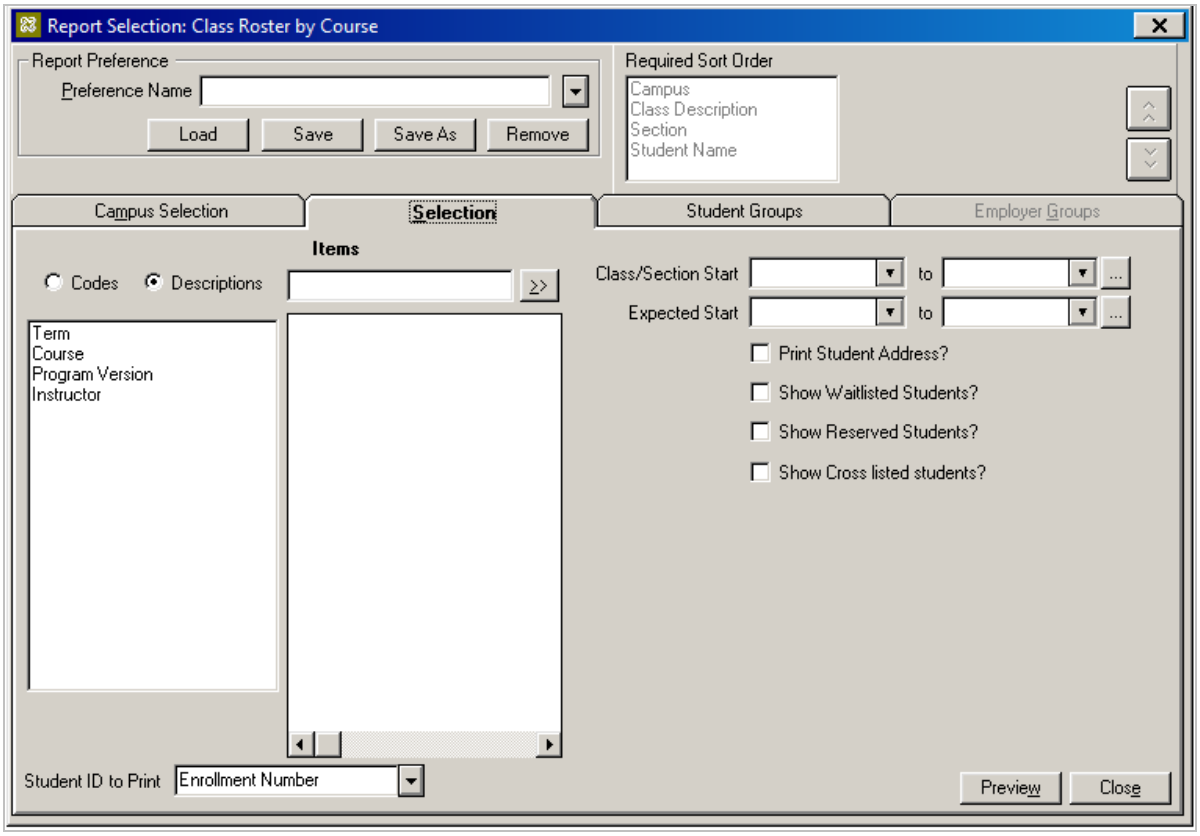
Class Roster by Course

This report produces rosters of class sections in sequence by class section, including courses that are defined as "Dependent".

When posting attendance for a class section, if a course section fails the Auto Drop rule after the Last Day to Withdraw (LDW) date, and that class section has the "Drop Rule Warning When Failed After LDW" enabled, then the class roster report displays a message alerting staff members that the Auto Drop rule failed after the LDW date. This warning appears regardless of whether the class section is configured for "Enforce LDW" within attendance rules. If the course is not dropped because "Enforce LDW" is selected in Attendance Rules (**Daily > Academic Records > Schedule Classes > Attendance Rules**) and it is after the LDW Date, the warning still appears on attendance rosters.

To run the report:

1. Navigate to **Reports > Academic Records > Class Roster by Course**. The Report Selection: Class Roster by Course form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



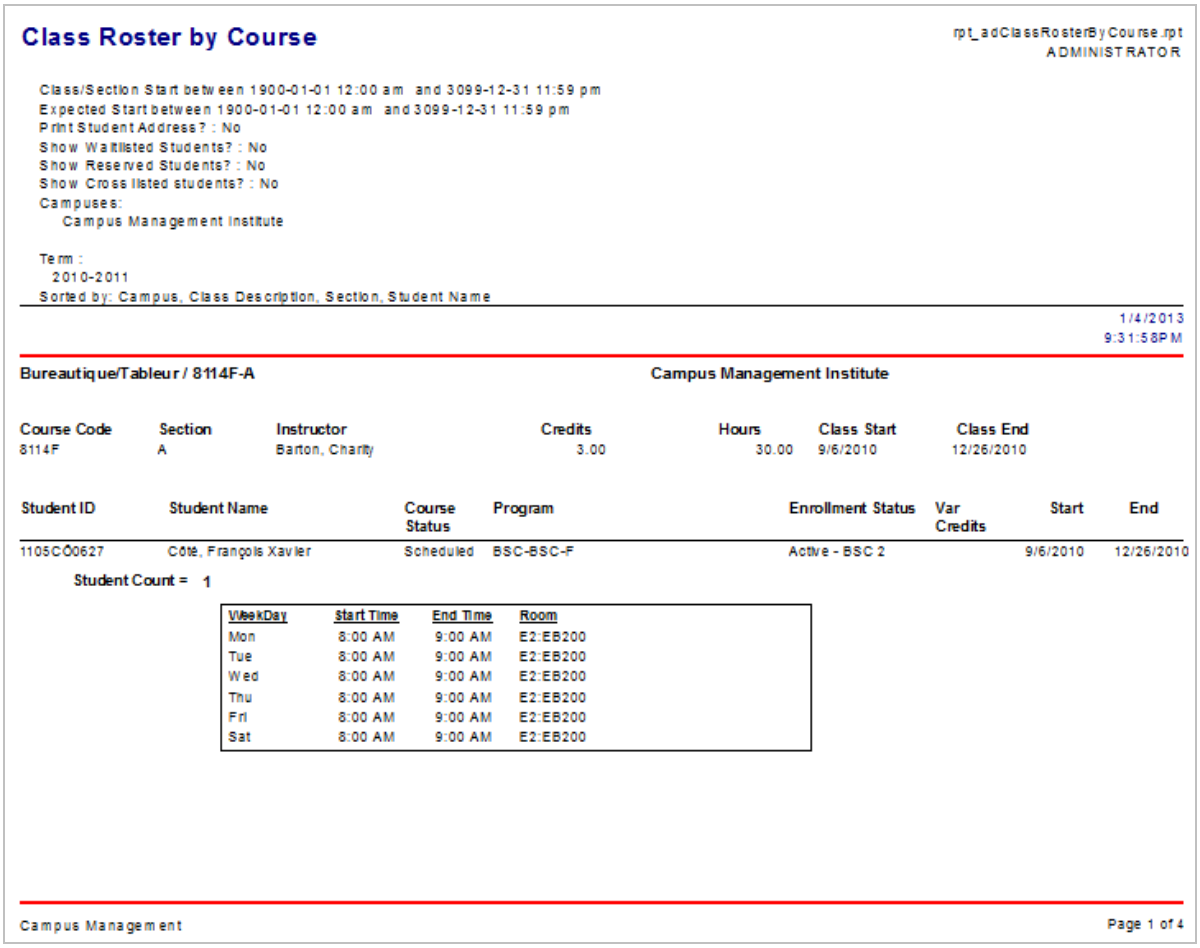
4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

- Course Code
- Section
- Instructor
- Credits
- Hours
- Class Start
- Class End
- Student ID
- Student Name
- Course Status
- Program
- Enrollment Status
- Variable Credits
- Start and End Date
- Student Count

Within class sections, students are sorted alphabetically by name. Each class section begins on a new page.



Class Roster by Course

rpt_adClassRosterByCourse.rpt
ADMINISTRATOR

Class/Section Start between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Expected Start between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Print Student Address? : No
Show Waitlisted Students? : No
Show Reserved Students? : No
Show Cross listed students? : No
Campuses:
Campus Management Institute

Term :
2010-2011
Sorted by: Campus, Class Description, Section, Student Name

1/4/2013
9:31:58 PM

Bureautique/Tableur / 8114F-A — **Campus Management Institute**

Course Code	Section	Instructor	Credits	Hours	Class Start	Class End
8114F	A	Barton, Charity	3.00	30.00	9/6/2010	12/26/2010

Student ID	Student Name	Course Status	Program	Enrollment Status	Var Credits	Start	End
1105CÔ0627	Côté, François Xavier	Scheduled	BSC-BSC-F	Active - BSC 2		9/6/2010	12/26/2010

Student Count = 1

WeekDay	Start Time	End Time	Room
Mon	8:00 AM	9:00 AM	E2:EB200
Tue	8:00 AM	9:00 AM	E2:EB200
Wed	8:00 AM	9:00 AM	E2:EB200
Thu	8:00 AM	9:00 AM	E2:EB200
Fri	8:00 AM	9:00 AM	E2:EB200
Sat	8:00 AM	9:00 AM	E2:EB200

Campus Management — Page 1 of 4

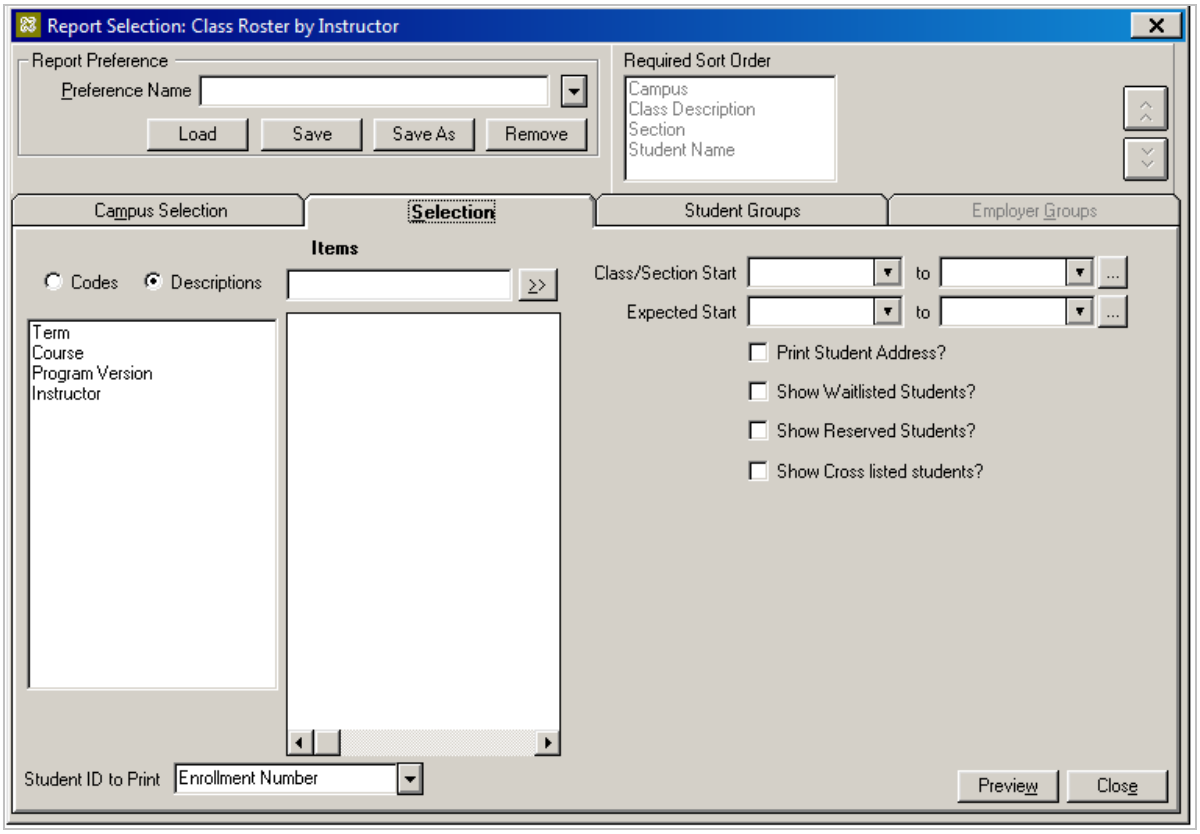
Class Roster by Instructor

This report produces rosters of class sections in sequence by instructor, including class rosters for courses that are defined as "Dependent".

When posting attendance for a class section, if a course section fails the Auto Drop rule after the Last Day to Withdraw (LDW) date, and that class section has the "Drop Rule Warning When Failed After LDW" enabled, then the instructor roster report displays a message alerting staff members that the Auto Drop rule failed after the LDW date. This warning appears regardless of whether the class section is configured for "Enforce LDW" within attendance rules. If the course is not dropped because "Enforce LDW" is selected in Attendance Rules (**Daily > Academic Records > Schedule Classes > Attendance Rules**) and it is after the LDW Date, the warning still appears on attendance rosters.

To run the report:

1. Navigate to **Reports > Academic Records > Class Roster by Instructor**. The Report Selection: Class Roster by Instructor form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



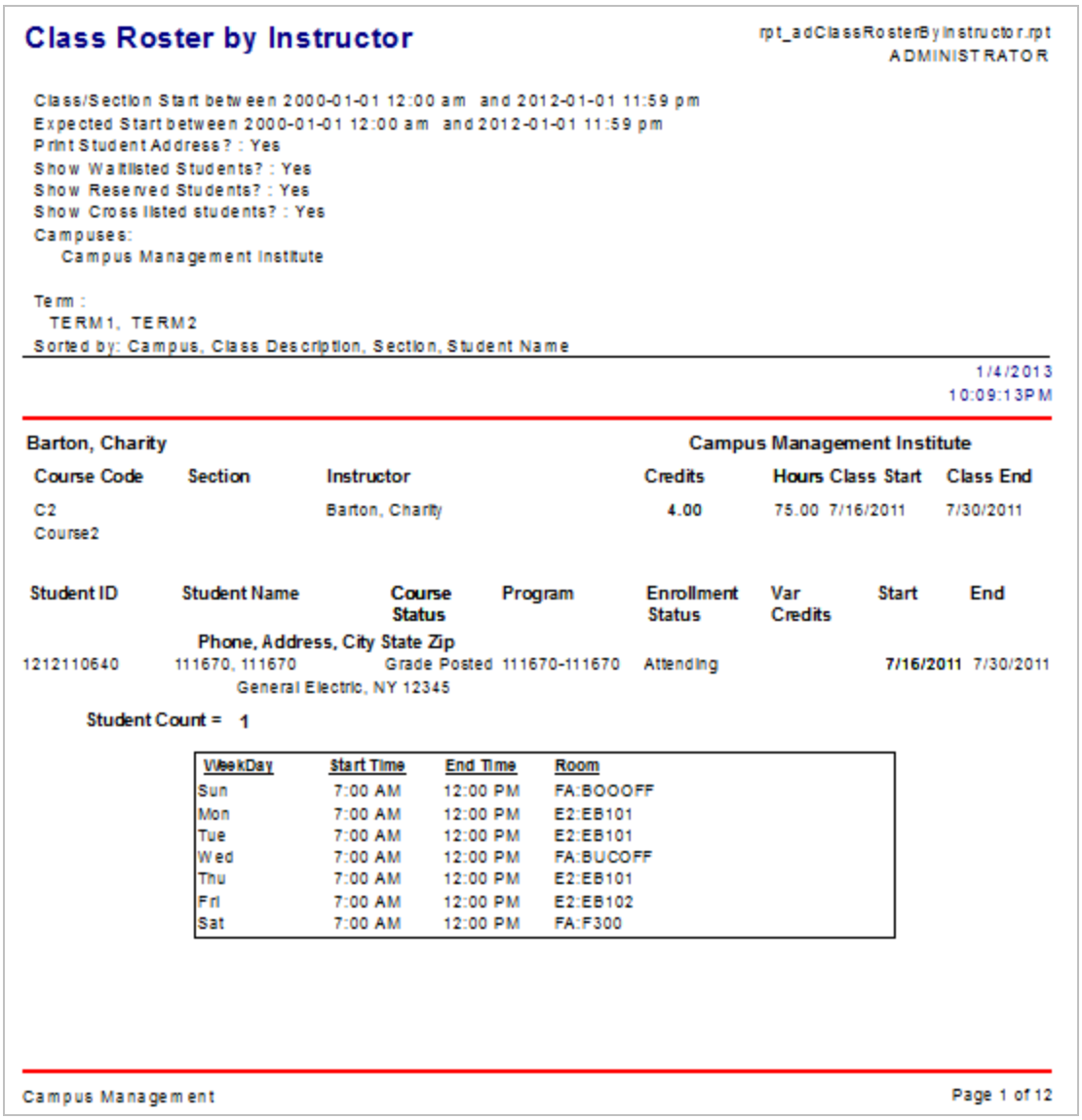
4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

- Course Code
- Section
- Instructor
- Credits
- Hours
- Class Start and End
- Student ID
- Student Name
- Course Status
- Program
- Enrollment Status
- Variable Credits
- Start and End Date
- Student Count

Within class sections, students are sorted alphabetically by name. Each class section begins on a new page.



Class Roster by Instructor

rpt_adClassRosterByInstructor.rpt
ADMINISTRATOR

Class/Section Start between 2000-01-01 12:00 am and 2012-01-01 11:59 pm
Expected Start between 2000-01-01 12:00 am and 2012-01-01 11:59 pm
Print Student Address? : Yes
Show Waitlisted Students? : Yes
Show Reserved Students? : Yes
Show Cross listed students? : Yes
Campuses:
Campus Management Institute

Term :
TERM1, TERM2
Sorted by: Campus, Class Description, Section, Student Name

1/4/2013
10:09:13PM

Barton, Charity — **Campus Management Institute**

Course Code	Section	Instructor	Credits	Hours	Class Start	Class End
C2 Course2		Barton, Charity	4.00	75.00	7/16/2011	7/30/2011

Student ID	Student Name	Course Status	Program	Enrollment Status	Var Credits	Start	End
	Phone, Address, City State Zip						
1212110640	111670, 111670 General Electric, NY 12345	Grade Posted	111670-111670	Attending		7/16/2011	7/30/2011

Student Count = 1

WeekDay	Start Time	End Time	Room
Sun	7:00 AM	12:00 PM	FA:BOOOFF
Mon	7:00 AM	12:00 PM	E2:EB101
Tue	7:00 AM	12:00 PM	E2:EB101
Wed	7:00 AM	12:00 PM	FA:BUCOFF
Thu	7:00 AM	12:00 PM	E2:EB101
Fri	7:00 AM	12:00 PM	E2:EB102
Sat	7:00 AM	12:00 PM	FA:F300

Campus Management

Page 1 of 12

Class Schedule

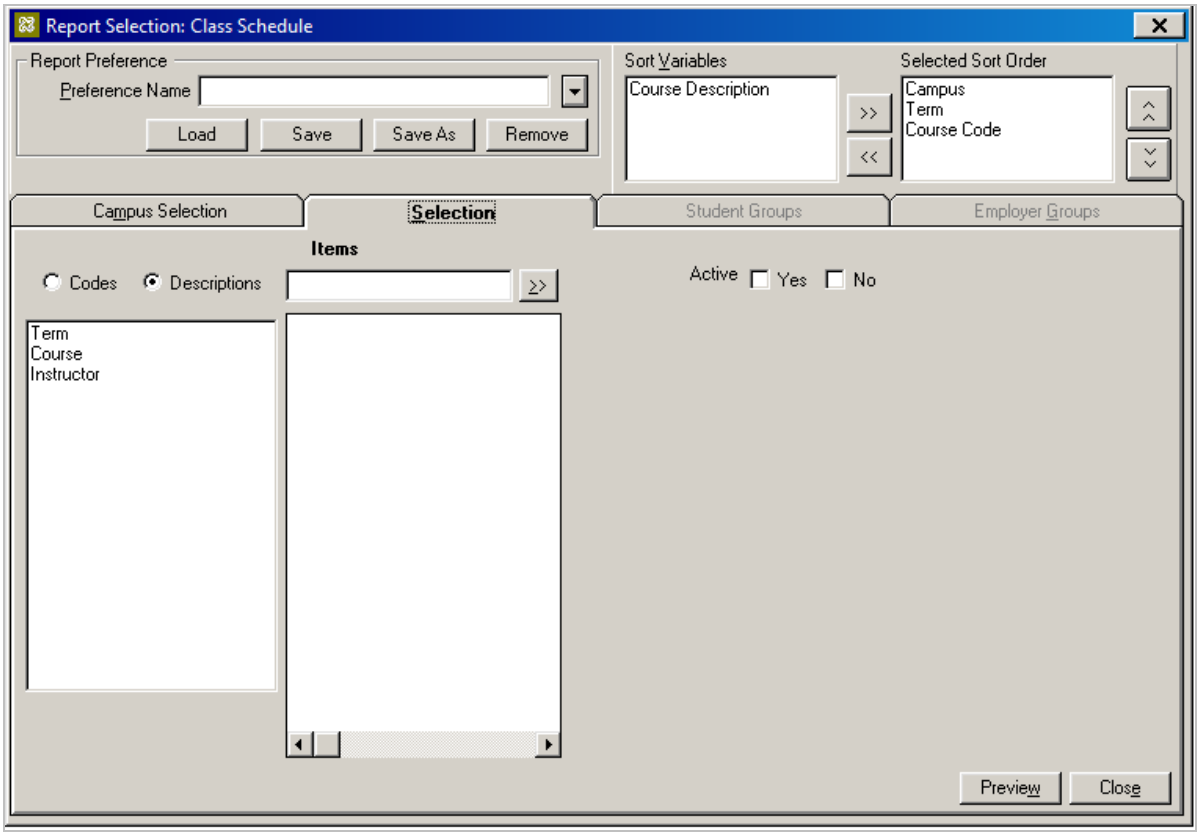
This report is a list of class sections with some basic information about each section.

Shared courses appear on the Course Schedules of all campuses. For Example, if a campus shares on-line courses with an on-ground campus, then the report displays courses for both types of campuses. Additionally, the number of available seats is displayed. Registrars have override capability for courses and seats available for their campuses but not for courses shared from other campuses.

The Class Schedule report contains a line below the Course Code and Course Description line indicating the Course Sharing Status. If the report is for the Shared Campus, then the Course Sharing Status is displayed as "Shared to other Campuses". The line is blank if the course is not a shared course. If the report is for the Receiving Campus, then the Course Sharing Status line displays "Offered by" and the Origination Campus name.

To run the report:

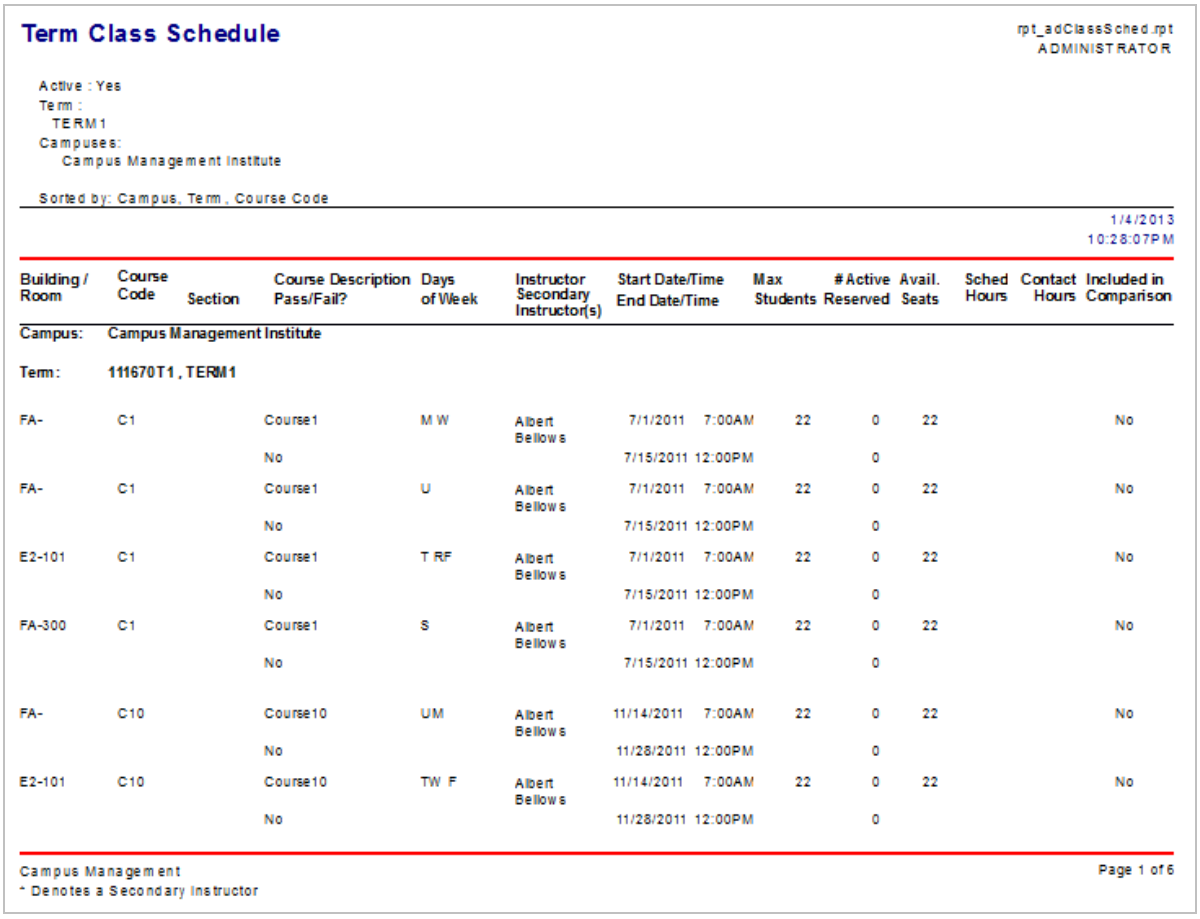
1. Navigate to **Reports > Academic Records > Class Schedule**. The Report Selection: Class Schedule form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

- Building/Room
- Course Code
- Section Code
- Course Description
- Pass/Fail (yes/no)
- Days of Week
- Instructor (and secondary instructor(s) if applicable)
- Start Date/Time
- End Date/Time
- Maximum Number of Students
- Number of Active Students
- Number of Available Seats
- Scheduled Hours
- Contact Hours
- Included in Comparison (yes/no)



Term Class Schedule

rpt_adClassSched.rpt
ADMINISTRATOR

Active : Yes
Term :
TERM1
Campuses:
Campus Management Institute

Sorted by: Campus, Term, Course Code

1/4/2013
10:28:07PM

Building / Room	Course Code	Section	Course Description	Pass/Fail?	Days of Week	Instructor Secondary Instructor(s)	Start Date/Time End Date/Time	Max Students	# Active Reserved	Avail. Seats	Sched Hours	Contact Hours	Included in Comparison
Campus:	**Campus Management Institute**												
Term:	**111670T1, TERM1**												
FA-	C1		Course1		M W	Albert Bellows	7/1/2011 7:00AM	22	0	22			No
				No			7/15/2011 12:00PM		0				
FA-	C1		Course1		U	Albert Bellows	7/1/2011 7:00AM	22	0	22			No
				No			7/15/2011 12:00PM		0				
E2-101	C1		Course1		T RF	Albert Bellows	7/1/2011 7:00AM	22	0	22			No
				No			7/15/2011 12:00PM		0				
FA-300	C1		Course1		S	Albert Bellows	7/1/2011 7:00AM	22	0	22			No
				No			7/15/2011 12:00PM		0				
FA-	C10		Course10		UM	Albert Bellows	11/14/2011 7:00AM	22	0	22			No
				No			11/28/2011 12:00PM		0				
E2-101	C10		Course10		TW F	Albert Bellows	11/14/2011 7:00AM	22	0	22			No
				No			11/28/2011 12:00PM		0				

Campus Management
* Denotes a Secondary Instructor

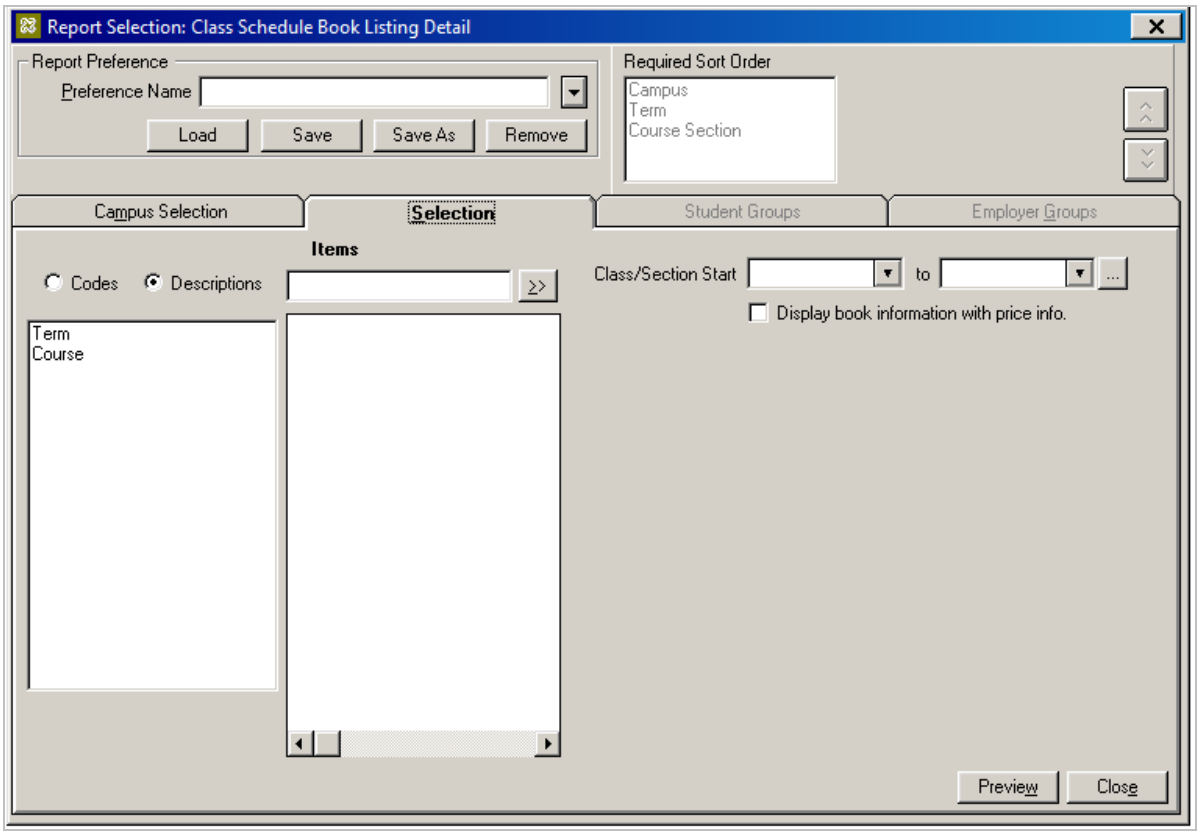
Page 1 of 6

Class Schedule Book Listing Detail

This report lists the book information for individual course sections. This information retrieved from the book lists assigned to each course section.

To run the report:

1. Navigate to **Reports > Academic Records > Class Schedule Book Listing Detail**. The Report Selection: Class Schedule Book Listing Detail form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

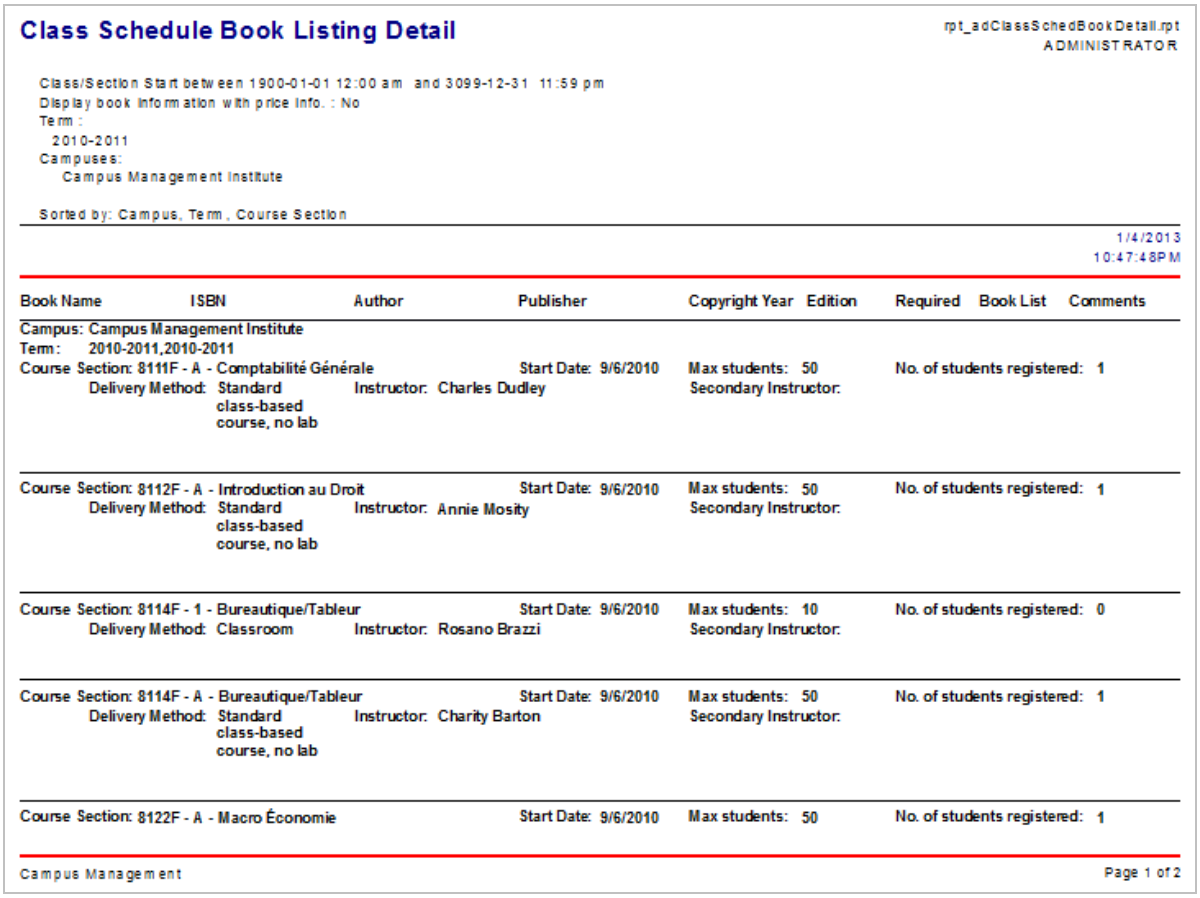
   For each course section the report lists the assigned books with the following details:

   - Book Name
   - ISBN
   - Author
   - Publisher
   - Copyright Year
   - Edition
   - Required (Yes or No)
   - Comments (if configured to be visible on student reports and online)

Optionally the Cost, Price, and Price Used fields may be included.

The report displays the following details for each course section:

- Campus
- Term
- Course Section
- Class Start Date
- Maximum Number of Students
- Number of Students Registered
- Delivery Method
- Instructor
- Secondary Instructor



Class Schedule Book Listing Detail

rpt_adClassSchedBookDetail.rpt
ADMINISTRATOR

Class/Section Start between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Display book information with price info. : No
Term :
2010-2011
Campuses:
Campus Management Institute

Sorted by: Campus, Term, Course Section

1/4/2013
10:47:48PM

Book Name	ISBN	Author	Publisher	Copyright Year	Edition	Required	Book List	Comments
Campus: Campus Management Institute								
Term: 2010-2011,2010-2011								
Course Section: 8111F - A - Comptabilité Générale			Start Date: 9/6/2010	Max students: 50		No. of students registered: 1		
Delivery Method: Standard class-based course, no lab		Instructor: Charles Dudley		Secondary Instructor:				
Course Section: 8112F - A - Introduction au Droit			Start Date: 9/6/2010	Max students: 50		No. of students registered: 1		
Delivery Method: Standard class-based course, no lab		Instructor: Annie Mosity		Secondary Instructor:				
Course Section: 8114F - 1 - Bureautique/Tableur			Start Date: 9/6/2010	Max students: 10		No. of students registered: 0		
Delivery Method: Classroom		Instructor: Rosano Brazzi		Secondary Instructor:				
Course Section: 8114F - A - Bureautique/Tableur			Start Date: 9/6/2010	Max students: 50		No. of students registered: 1		
Delivery Method: Standard class-based course, no lab		Instructor: Charity Barton		Secondary Instructor:				
Course Section: 8122F - A - Macro Économie			Start Date: 9/6/2010	Max students: 50		No. of students registered: 1		

Campus Management

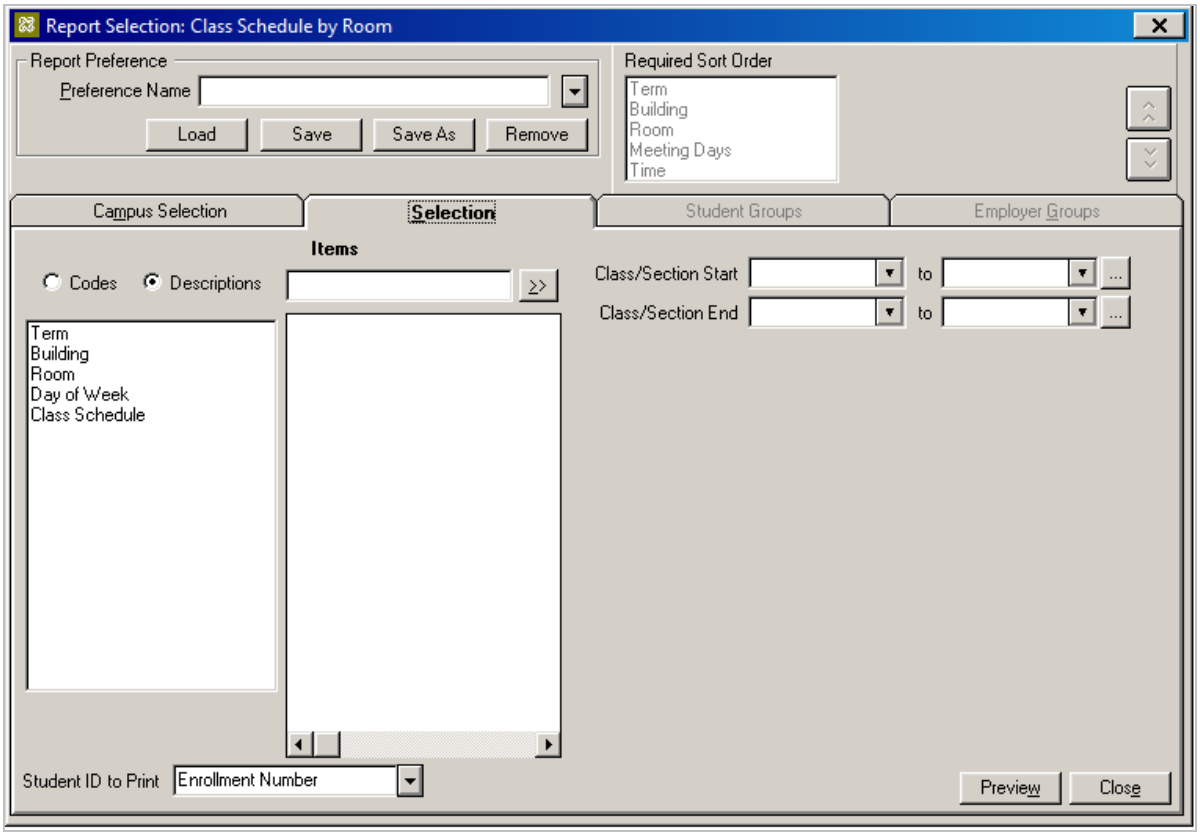
Page 1 of 2

Class Schedule by Room

This report displays information about the classes being offered in a classroom.

To run the report:

1. Navigate to **Reports > Academic Records > Class Schedule by Room**. The Report Selection: Class Schedule by Room form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

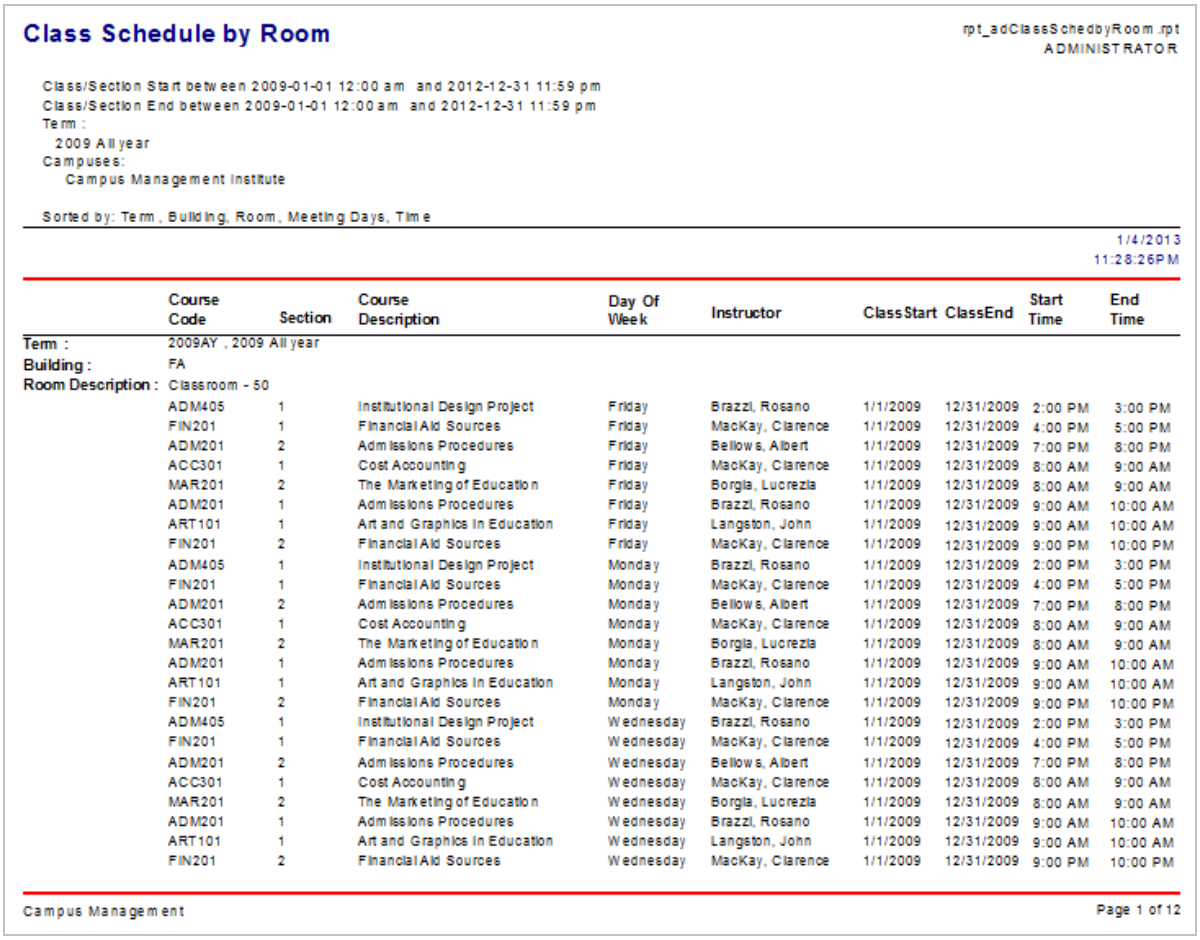


4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details for each course section:

   - Term
   - Building
   - Room Description
   - Course Code
   - Section
   - Course Description
   - Day of Week
   - Instructor
   - Class Start and End Date

- Start and End Time



Class Schedule by Room

rpt_adClassSchedbyRoom.rpt
ADMINISTRATOR

Class/Section Start between 2009-01-01 12:00 am and 2012-12-31 11:59 pm
Class/Section End between 2009-01-01 12:00 am and 2012-12-31 11:59 pm
Term :
2009 All year
Campuses:
Campus Management Institute

Sorted by: Term, Building, Room, Meeting Days, Time

1/4/2013
11:28:26PM

	Course Code	Section	Course Description	Day Of Week	Instructor	ClassStart	ClassEnd	Start Time	End Time
Term :	2009AY , 2009 All year								
Building :	FA								
Room Description :	Classroom - 50								
	ADM405	1	Institutional Design Project	Friday	Brazzi, Rosano	1/1/2009	12/31/2009	2:00 PM	3:00 PM
	FIN201	1	Financial Aid Sources	Friday	MacKay, Clarence	1/1/2009	12/31/2009	4:00 PM	5:00 PM
	ADM201	2	Admissions Procedures	Friday	Bellows, Albert	1/1/2009	12/31/2009	7:00 PM	8:00 PM
	ACC301	1	Cost Accounting	Friday	MacKay, Clarence	1/1/2009	12/31/2009	8:00 AM	9:00 AM
	MAR201	2	The Marketing of Education	Friday	Borgia, Lucrezia	1/1/2009	12/31/2009	8:00 AM	9:00 AM
	ADM201	1	Admissions Procedures	Friday	Brazzi, Rosano	1/1/2009	12/31/2009	9:00 AM	10:00 AM
	ART101	1	Art and Graphics In Education	Friday	Langston, John	1/1/2009	12/31/2009	9:00 AM	10:00 AM
	FIN201	2	Financial Aid Sources	Friday	MacKay, Clarence	1/1/2009	12/31/2009	9:00 PM	10:00 PM
	ADM405	1	Institutional Design Project	Monday	Brazzi, Rosano	1/1/2009	12/31/2009	2:00 PM	3:00 PM
	FIN201	1	Financial Aid Sources	Monday	MacKay, Clarence	1/1/2009	12/31/2009	4:00 PM	5:00 PM
	ADM201	2	Admissions Procedures	Monday	Bellows, Albert	1/1/2009	12/31/2009	7:00 PM	8:00 PM
	ACC301	1	Cost Accounting	Monday	MacKay, Clarence	1/1/2009	12/31/2009	8:00 AM	9:00 AM
	MAR201	2	The Marketing of Education	Monday	Borgia, Lucrezia	1/1/2009	12/31/2009	8:00 AM	9:00 AM
	ADM201	1	Admissions Procedures	Monday	Brazzi, Rosano	1/1/2009	12/31/2009	9:00 AM	10:00 AM
	ART101	1	Art and Graphics In Education	Monday	Langston, John	1/1/2009	12/31/2009	9:00 AM	10:00 AM
	FIN201	2	Financial Aid Sources	Monday	MacKay, Clarence	1/1/2009	12/31/2009	9:00 PM	10:00 PM
	ADM405	1	Institutional Design Project	Wednesday	Brazzi, Rosano	1/1/2009	12/31/2009	2:00 PM	3:00 PM
	FIN201	1	Financial Aid Sources	Wednesday	MacKay, Clarence	1/1/2009	12/31/2009	4:00 PM	5:00 PM
	ADM201	2	Admissions Procedures	Wednesday	Bellows, Albert	1/1/2009	12/31/2009	7:00 PM	8:00 PM
	ACC301	1	Cost Accounting	Wednesday	MacKay, Clarence	1/1/2009	12/31/2009	8:00 AM	9:00 AM
	MAR201	2	The Marketing of Education	Wednesday	Borgia, Lucrezia	1/1/2009	12/31/2009	8:00 AM	9:00 AM
	ADM201	1	Admissions Procedures	Wednesday	Brazzi, Rosano	1/1/2009	12/31/2009	9:00 AM	10:00 AM
	ART101	1	Art and Graphics In Education	Wednesday	Langston, John	1/1/2009	12/31/2009	9:00 AM	10:00 AM
	FIN201	2	Financial Aid Sources	Wednesday	MacKay, Clarence	1/1/2009	12/31/2009	9:00 PM	10:00 PM

Campus Management

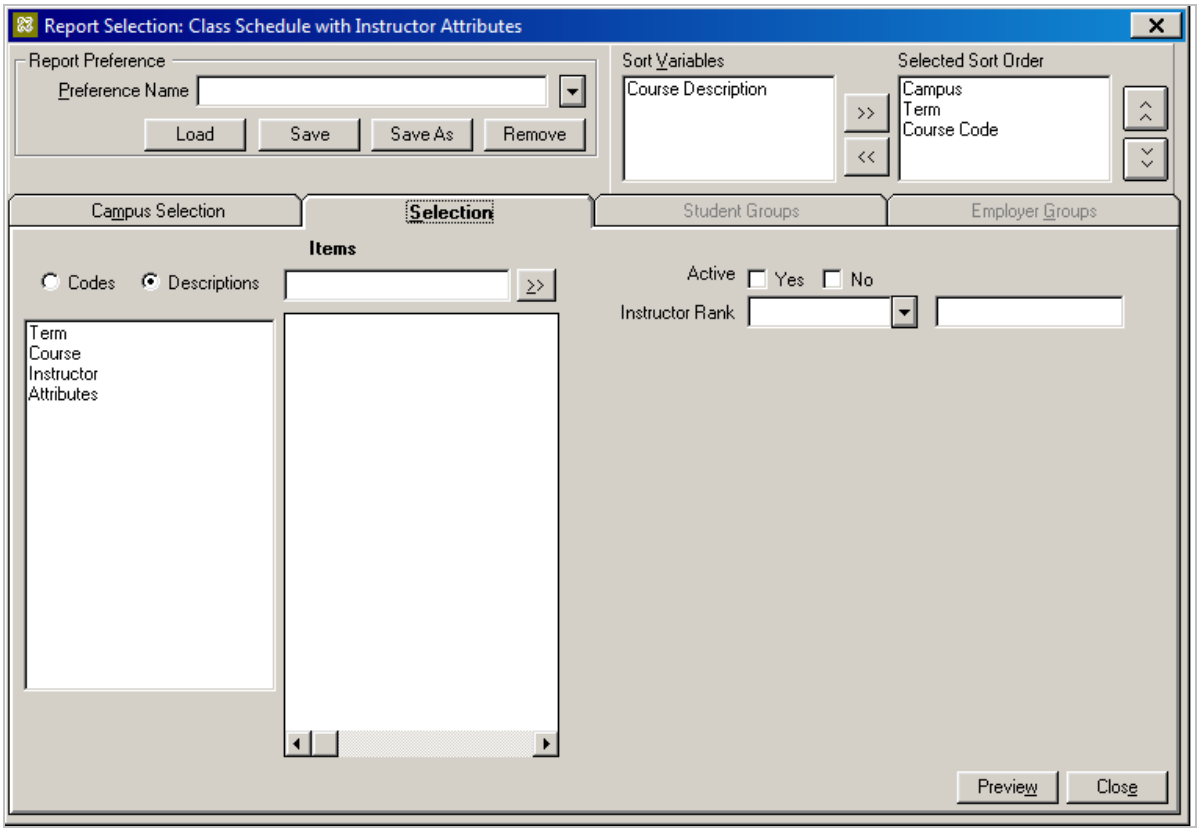
Page 1 of 12

Class Schedule with Instructor Attributes

This report shows the class schedule information with the instructors and their ranking order and attributes.

To run the report:

1. Navigate to **Reports > Academic Records > Class Schedule with Instructor Attributes**. The Report Selection: Class Schedule with Instructor Attributes form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

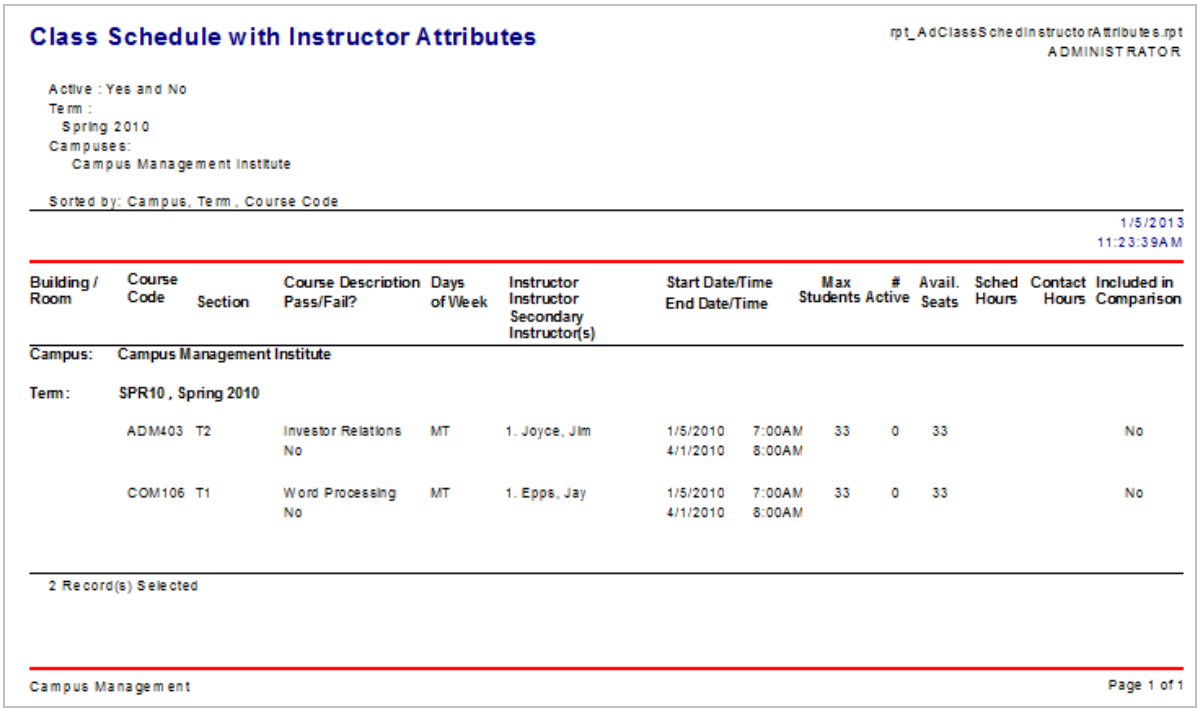


4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Building/Room
   - Course Code
   - Section Code
   - Course Description
   - Pass/Fail (yes/no)
   - Days of Week
   - Instructor (and secondary instructor(s) if applicable)
   - Start Date/Time
   - End Date/Time
   - Maximum Number of Students

- Number of Active Students
- Number of Available Seats
- Scheduled Hours
- Contact Hours
- Included in Comparison (yes/no)



Class Schedule with Instructor Attributes

rpt_AdClassSchedInstructorAttributes.rpt
ADMINISTRATOR

Active : Yes and No
Term :
Spring 2010
Campuses:
Campus Management Institute

Sorted by: Campus, Term, Course Code

1/5/2013
11:23:39AM

Building / Room	Course Code	Section	Course Description Pass/Fail?	Days of Week	Instructor Instructor Secondary Instructor(s)	Start Date/Time End Date/Time		Max Students	# Active	Avail. Seats	Sched Hours	Contact Hours	Included in Comparison
Campus:	Campus Management Institute												
Term:	SPR10 , Spring 2010												
	ADM403	T2	Investor Relations No	MT	1. Joyce, Jim	1/5/2010 4/1/2010	7:00AM 8:00AM	33	0	33			No
	COM106	T1	Word Processing No	MT	1. Epps, Jay	1/5/2010 4/1/2010	7:00AM 8:00AM	33	0	33			No

2 Record(s) Selected

Campus Management

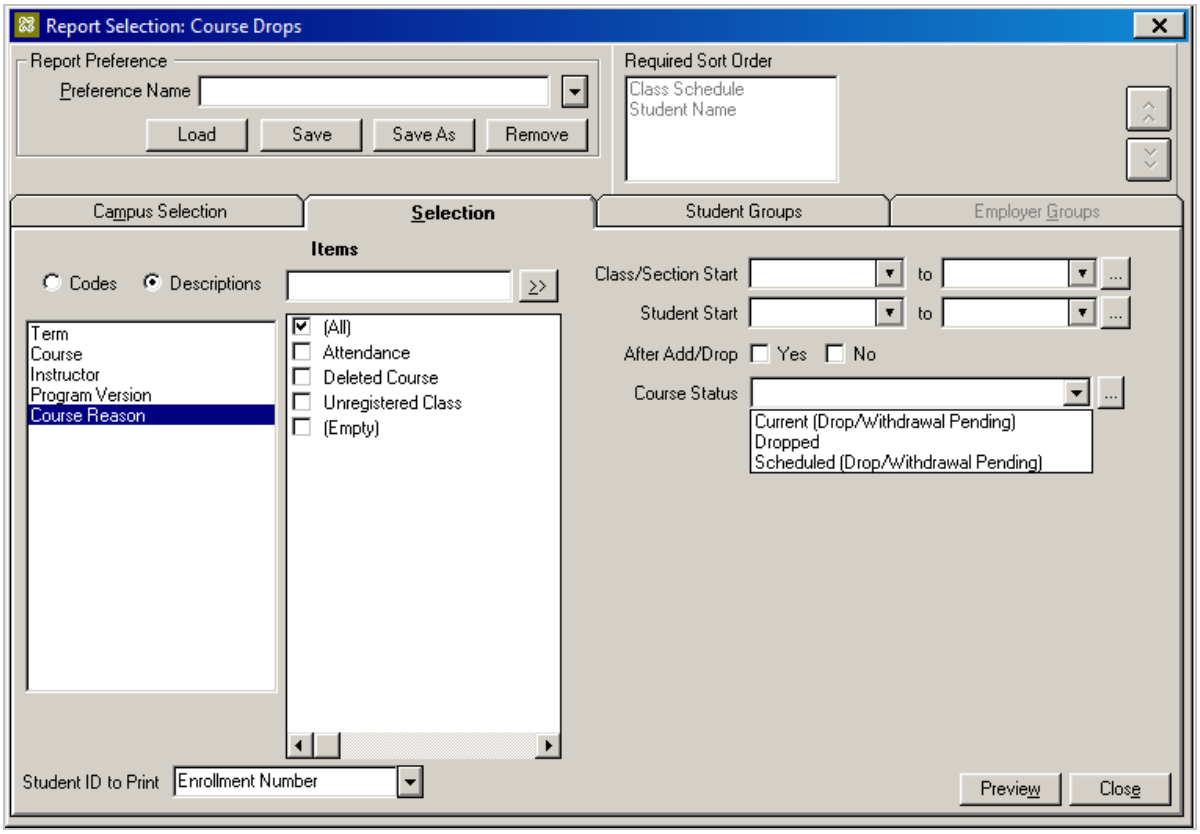
Page 1 of 1

Course Drops

This report lists students that have dropped a class section.

To run the report:

1. Navigate to **Reports > Academic Records > Course Drops**. The Report Selection: Course Drops form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The header information includes:

   - Course Description
   - Term
   - Course Code
   - Section Number
   - Instructor

- Credits
- Course Start and End Date

The detail information includes:

- Student ID
- Student Name
- Class Status (D = Dropped)
- Student Status
- Reason
- Start and End Date
- Drop Date
- Student Count

Course Drops

rpt_adCourseDrop.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- Student Start between 1/1/2009 and 1/1/2012

Sorted by: Class Schedule, Student Name

1/5/2013
11:56:14AM

Admissions Procedures

Term	Course Code	Section	Instructor	Credits	Start	End
200903PRESTON	ADM201		Charity Barton	3.00	3/10/2009	5/10/2009

Student ID	Student Name	Class Status	Student Status	Reason	Start	End	Drop Date
0904CO0575	Collins, Lee C	Dropped	Drop	School Status Change	3/10/2009	5/10/2009	4/22/2009 *

Student Count = 1

Mathematics Review

Term	Course Code	Section	Instructor	Credits	Start	End
2009AY	MAT101	1	Annie Mosity	3.00	1/1/2009	12/31/2009

Student ID	Student Name	Class Status	Student Status	Reason	Start	End	Drop Date
0701AT0534	Athman, Ron	Dropped	Drop	School Status Change	1/1/2009	12/31/2009	7/26/2009 *

Student Count = 1

Marketing and Sales Concepts

Term	Course Code	Section	Instructor	Credits	Start	End
2009AY	MAR101	1	James Astor	3.00	1/1/2009	12/31/2009

Student ID	Student Name	Class Status	Student Status	Reason	Start	End	Drop Date
0609UT0510	Uthe, Deb	Dropped	Active	Attendance	1/1/2009	12/31/2009	3/16/2011 *

Student Count = 1

Accounting 2

Term	Course Code	Section	Instructor	Credits	Start	End
2009AY	ACC208	1	Dee Beancounter	4.00	1/1/2009	12/31/2009

Student ID	Student Name	Class Status	Student Status	Reason	Start	End	Drop Date
0910MO0600	Mouth, Sassy	Dropped	Withdrawal	Attendance	1/1/2009	12/31/2009	6/27/2011 *

Student Count = 1

Institutional Design Project

Term	Course Code	Section	Instructor	Credits	Start	End
2009AY	ADM405		Charity Barton	6.00	1/1/2009	12/31/2009

* Indicates that the course was dropped after the Add/Drop period.

Campus Management

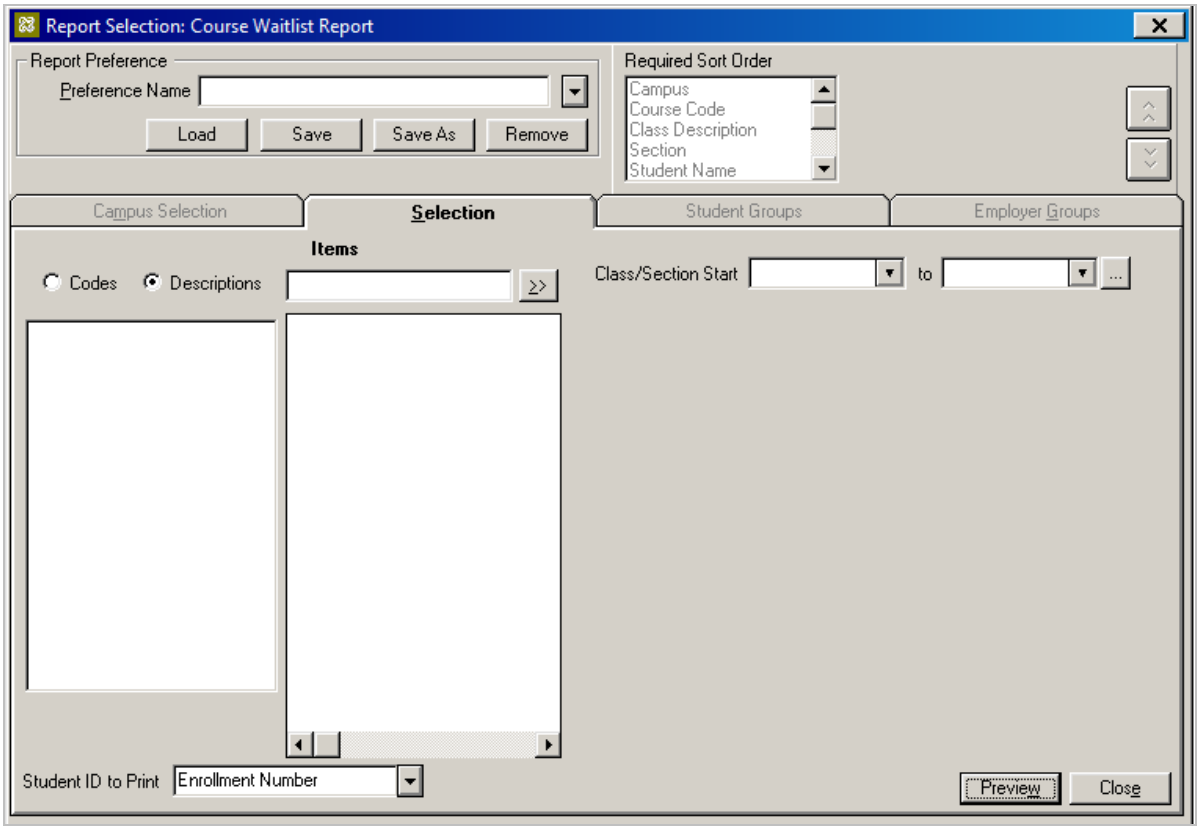
Page 1 of 2

Course Waitlist Report

This report displays students that are on the waitlist for a class/section start date range.

To run the report:

1. Navigate to **Reports > Academic Records > Course Waitlist Report**. The Report Selection: Course Waitlist Report form is displayed.
2. Select appropriate options on the Selection tab.



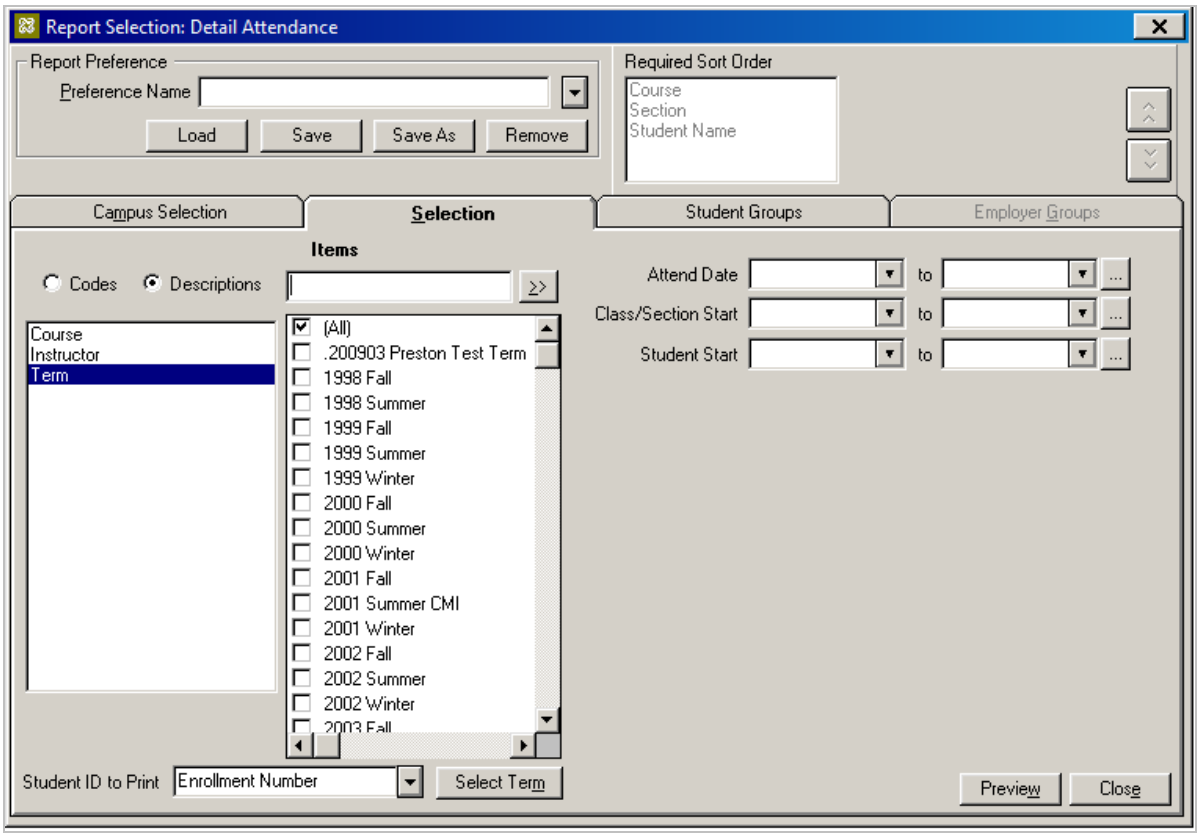
3. Click **Preview**. The report is assembled and displayed in the Report Viewer.

Detail Attendance

This report provides a detailed list of attendance records for each student. The report can be executed from the Reports menu (for all students) or from the View menu (for a selected student).

To run the report:

1. Navigate to **Reports > Academic Records > Detail Attendance**. The Report Selection: Detail Attendance form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Course/Section Code
   - Course Description
   - Term
   - Instructor
   - Student Name

- Student ID
- Date
- Hours Attended
- Hours Scheduled
- Excused Absences
- Comments (indicating, for example, if the hours are makeup hours)

If a detailed attendance record is for a "Dependent" course, the "Dependent" course description is updated to the comment field in the attendance table.

For each student, totals include hours attended and hours scheduled.

Detail Attendance

rpt_adAttendanceDetail.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- Attend Date between 1/1/2008 and 1/1/2009
Term : (All)
Sorted by: Course, Section, Student Name

1/5/2013
12:51:52PM

Course/Section: ACC1012008WIN — **Accounting 101**

Term: 2008WIN — Instructor: Bunyon, P.

Student Name / Type	Date	Hours Attended	Hours Scheduled	Excused Absent	Comments
AHMADI, MOHAMMAD Q		0802AH0552			
A	1/23/2008	0:00	2:00		
		0:00	2:00		
Section Totals		0:00	2:00	1 Record(s)	

Course/Section: ACC102 01200810D3 — **Accounting 102**

Term: 200810D3 — Instructor: Borgia, Lucrezia

Student Name / Type	Date	Hours Attended	Hours Scheduled	Excused Absent	Comments
Adams, Gary M		0903AD0569			
A	10/2/2008	1:00	1:00		
		1:00	1:00		
Section Totals		1:00	1:00	1 Record(s)	

Course/Section: ACC210 02200810D3 — **Accounting I**

Term: 200810D3 — Instructor: Brazzi, Rosano

Student Name / Type	Date	Hours Attended	Hours Scheduled	Excused Absent	Comments
Adams, Gary M		0903AD0569			
A	10/2/2008	1:00	1:00		
		1:00	1:00		
Section Totals		1:00	1:00	1 Record(s)	

Course/Section: ACC211 03200811D2 — **Accounting II**

Term: 200811D2 — Instructor: Bitfiddler, Sparky

Student Name / Type	Date	Hours Attended	Hours Scheduled	Excused Absent	Comments
Adams, Gary M		0903AD0569			
A	11/10/2008	1:00	1:00		
		1:00	1:00		
Section Totals		1:00	1:00	1 Record(s)	

Course/Section: ADM4022008WIN — **Cost Accounting**

Term: 2008WIN — Instructor: Bellows, Albert

Student Name / Type	Date	Hours Attended	Hours Scheduled	Excused Absent	Comments
Chambers, Cecelia		9906CH0143			
A	1/28/2008	1:00	0:05		
		1:00	0:05		
Smith, Sassy		0812SM0564			

Campus Management

Page 1 of 2

Drop Report

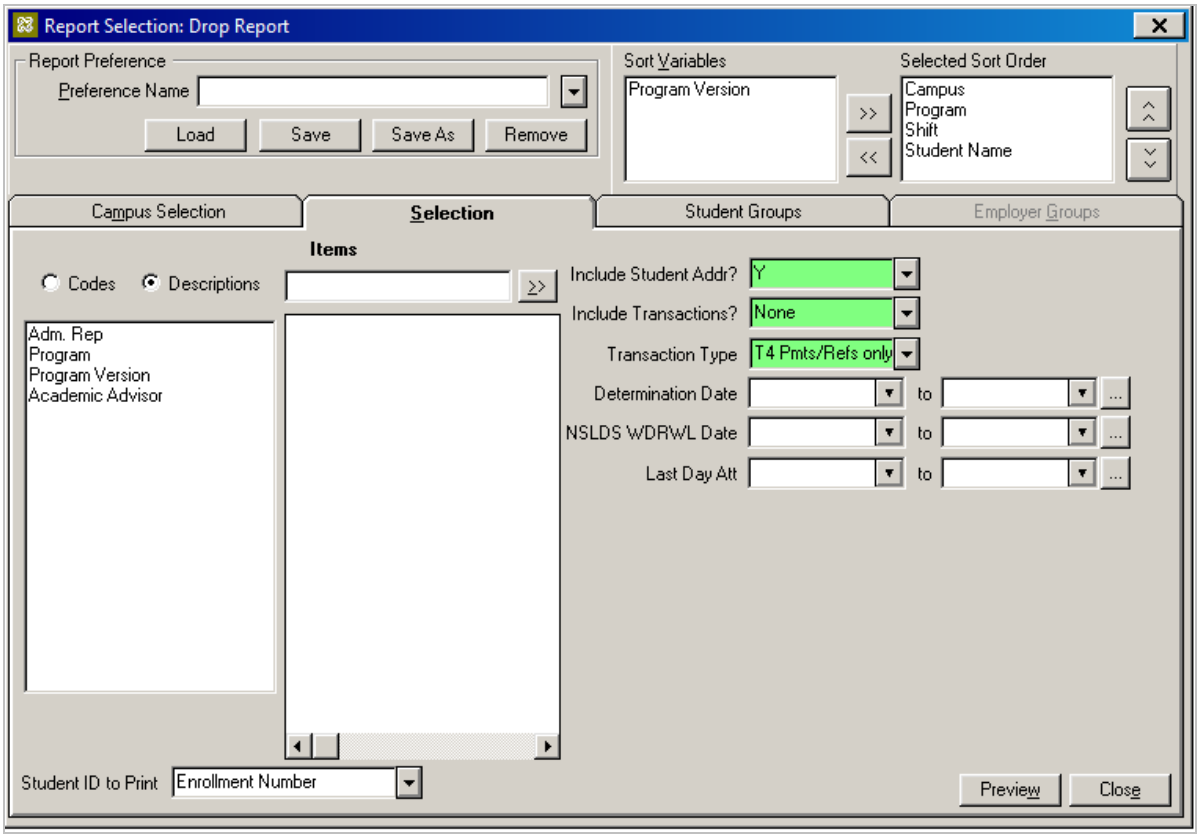
This report lists students that have dropped out of an enrollment.

To run the report:

1. Navigate to **Reports > Academic Records > Drop Report**. The Report Selection: Drop Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Notes:

   - The 'Include Transactions' options are: None, Posted After LDA, and Posted After Drop.
   - The 'Transaction Type' options are: T4 Payments/Refunds only, T4 Payments only, Payments/Refunds only, Payments only, Charges/Adjustments only, and All transaction types.



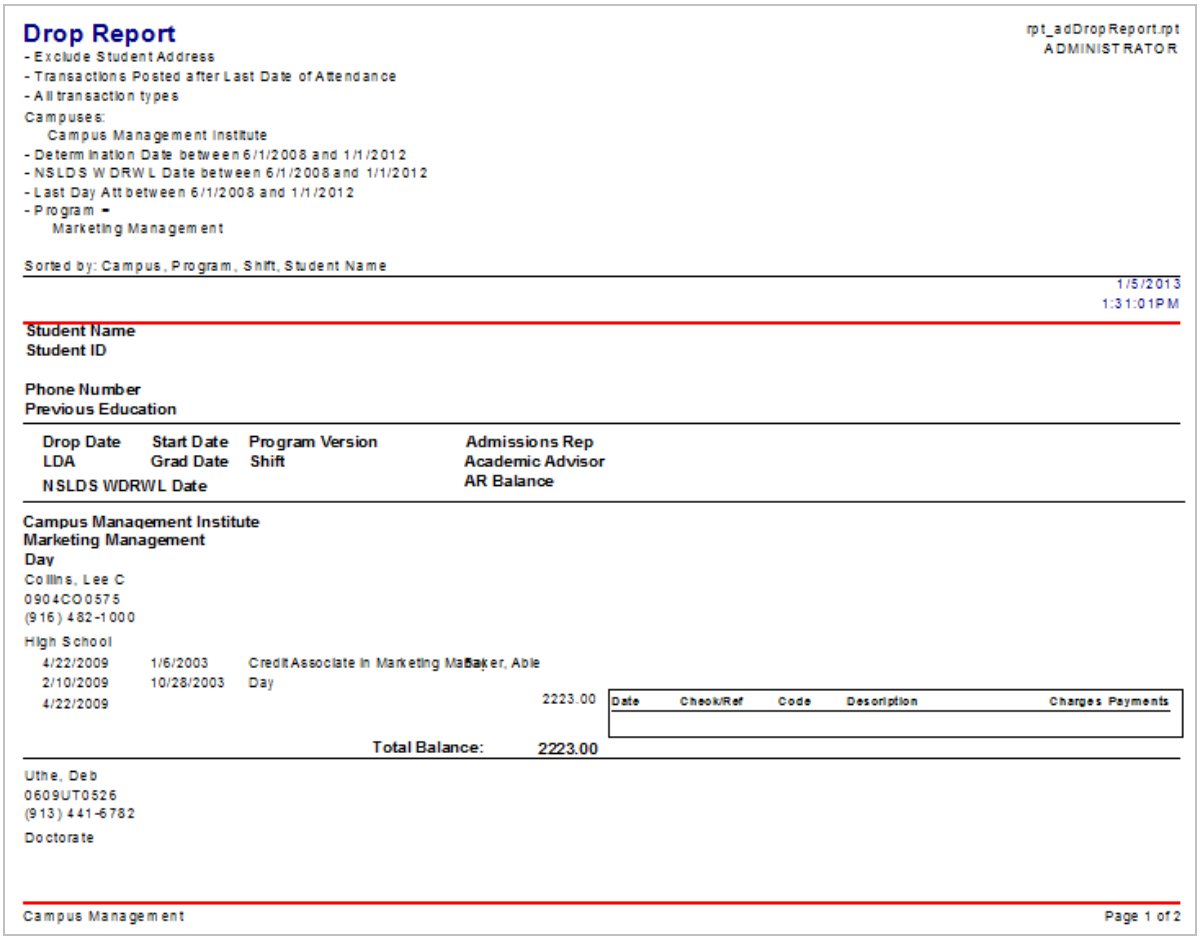
4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

- Student Name
- Student ID
- Student Address (if selected)
- Phone Number
- Previous Education
- Drop Date
- Last Date of Attendance (LDA)
- National Student Loan Data System (NSLDS) Withdrawal (WDRWL) Date
- Start Date
- Graduation Date
- Program Version
- Shift
- Admissions Representative
- Academic Advisor
- Accounts Receivable (AR) Balance



Drop Report

rpt_adDropReport.rpt
ADMINISTRATOR

- Exclude Student Address
- Transactions Posted after Last Date of Attendance
- All transaction types

Campuses:
Campus Management Institute
- Determination Date between 6/1/2008 and 1/1/2012
- NSLDS WDRWL Date between 6/1/2008 and 1/1/2012
- Last Day Att between 6/1/2008 and 1/1/2012
- Program =
Marketing Management

Sorted by: Campus, Program, Shift, Student Name

1/5/2013
1:31:01PM

Student Name
Student ID

Phone Number
Previous Education

Drop Date	**Start Date**	**Program Version**	**Admissions Rep**
LDA	**Grad Date**	**Shift**	**Academic Advisor**
NSLDS WDRWL Date			**AR Balance**

Campus Management Institute
Marketing Management
Day
Collins, Lee C
0904CO0575
(916) 482-1000
High School

4/22/2009	1/6/2003	Credit	Associate in Marketing Ma	Baker, Able
2/10/2009	10/28/2003	Day		
4/22/2009			2223.00	

Date	Check/Ref	Code	Description	Charges	Payments

Total Balance: 2223.00

Uthe, Deb
0609UT0526
(913) 441-6782
Doctorate

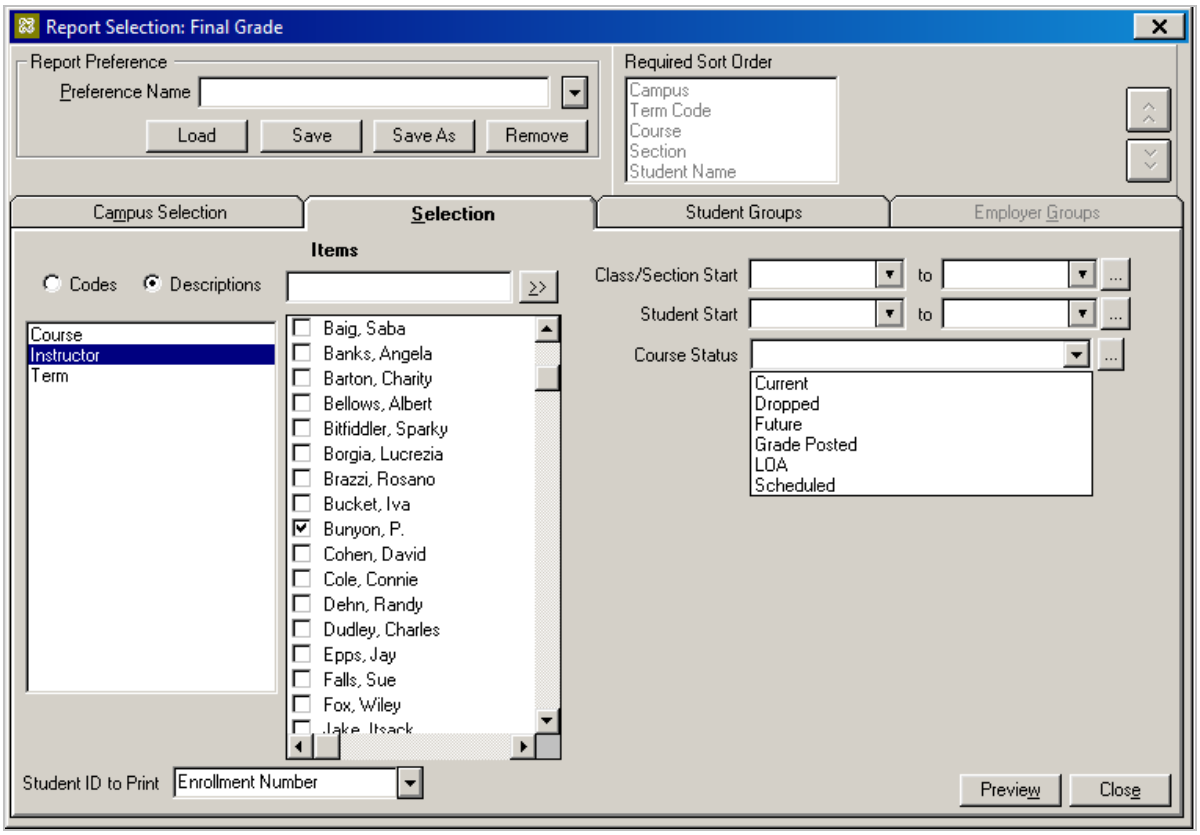
Campus Management
Page 1 of 2

Final Grade

This report lists students within class sections with final grades (if any). All students in the class section are listed so that missing final grades are obvious on the report.

To run the report:

1. Navigate to **Reports > Academic Records > Final Grade**. The Report Selection: Final Grade form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The header information includes:

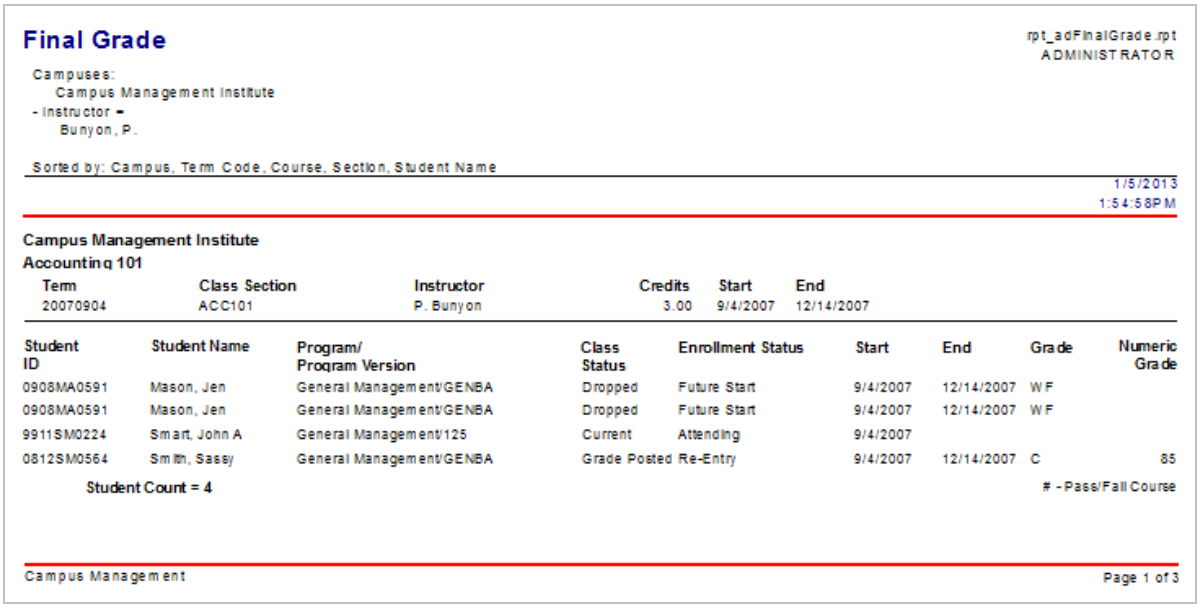
   - Campus
   - Course Description
   - Term
   - Class Section
   - Instructor

- Credits
- Start and End Dates

The report details include:

- Student ID
- Student Name
- Program/Program Version
- Class Status
- Enrollment Status
- Student's Start and End Date in a class
- Letter Grade
- Numeric Grade (if any)

Each class section begins on a new page.



Final Grade

rpt_adFinalGrade.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- Instructor -
Bunyon, P.

Sorted by: Campus, Term Code, Course, Section, Student Name

1/5/2013
1:54:58PM

Campus Management Institute
Accounting 101

Term	Class Section	Instructor	Credits	Start	End
20070904	ACC101	P. Bunyon	3.00	9/4/2007	12/14/2007

Student ID	Student Name	Program/ Program Version	Class Status	Enrollment Status	Start	End	Grade	Numeric Grade
0908MA0591	Mason, Jen	General Management/GENBA	Dropped	Future Start	9/4/2007	12/14/2007	WF	
0908MA0591	Mason, Jen	General Management/GENBA	Dropped	Future Start	9/4/2007	12/14/2007	WF	
9911SM0224	Smart, John A	General Management/125	Current	Attending	9/4/2007			
0812SM0564	Smith, Sassy	General Management/GENBA	Grade Posted	Re-Entry	9/4/2007	12/14/2007	C	85

Student Count = 4

- Pass/Fail Course

Campus Management

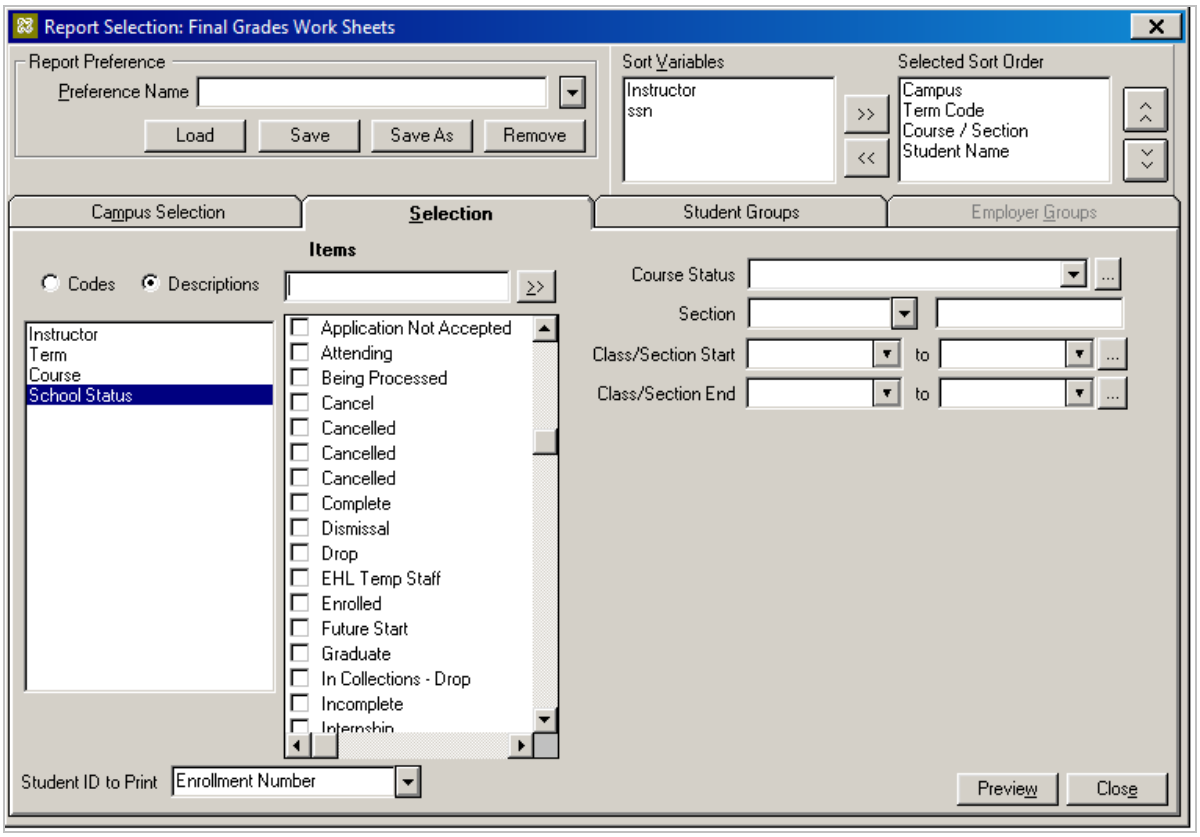
Page 1 of 3

Final Grades Work Sheets

This report is used by instructors to record final grades for students in class sections. The grades are later entered into CampusNexus Student for each listed student.

To run the report:

1. Navigate to **Reports > Academic Records > Final Grades Work Sheets**. The Report Selection: Final Grades Work Sheets form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The header information includes:

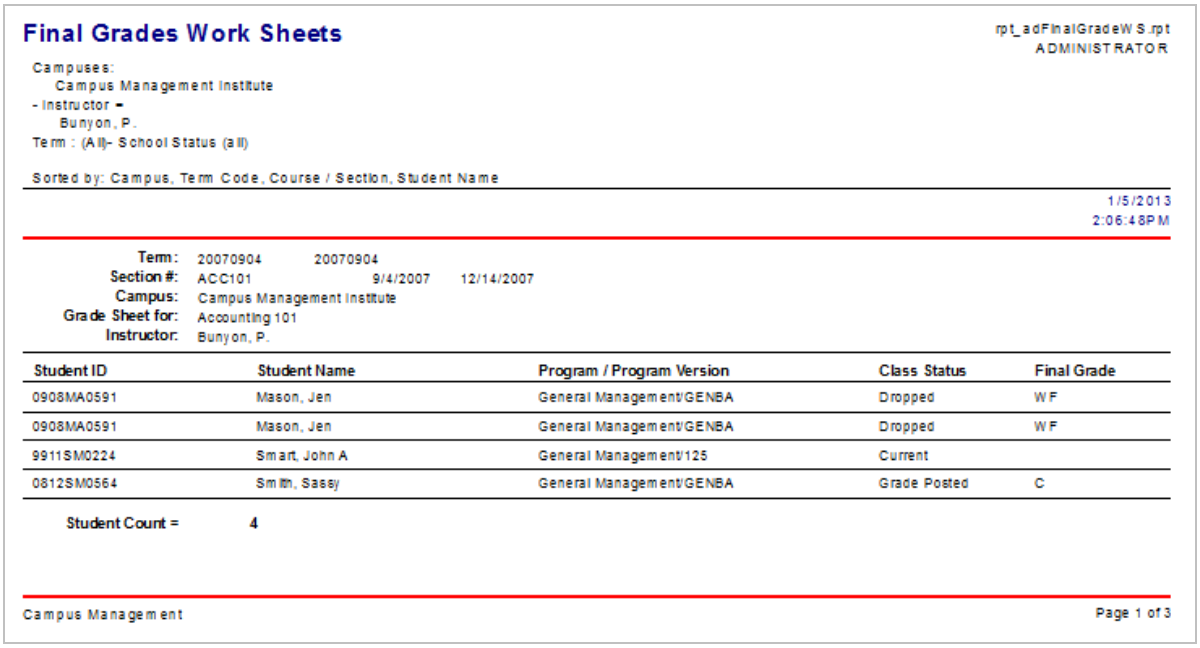
   - Term
   - Class Section
   - Class Start and End dates
   - Campus

- Course Description
- Instructor

The detail lines for each student include:

- Student ID (enrollment number, student ID, or SSN)
- Student Name
- Program/Program Version
- Class Status
- Final Grade

Note: If blind grading is required for a class section, the students' names are replaced by blind grade IDs.



Final Grades Work Sheets

rpt_adFinalGradeWS.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- Instructor -
Bunyon, P.
Term : (All)- School Status (all)

Sorted by: Campus, Term Code, Course / Section, Student Name

1/5/2013
2:06:48PM

Term: 20070904 20070904
Section #: ACC101 9/4/2007 12/14/2007
Campus: Campus Management Institute
Grade Sheet for: Accounting 101
Instructor: Bunyon, P.

Student ID	Student Name	Program / Program Version	Class Status	Final Grade
0908MA0591	Mason, Jen	General Management/GENBA	Dropped	WF
0908MA0591	Mason, Jen	General Management/GENBA	Dropped	WF
9911SM0224	Smart, John A	General Management/125	Current	
0812SM0564	Smith, Sassy	General Management/GENBA	Grade Posted	C

Student Count = 4

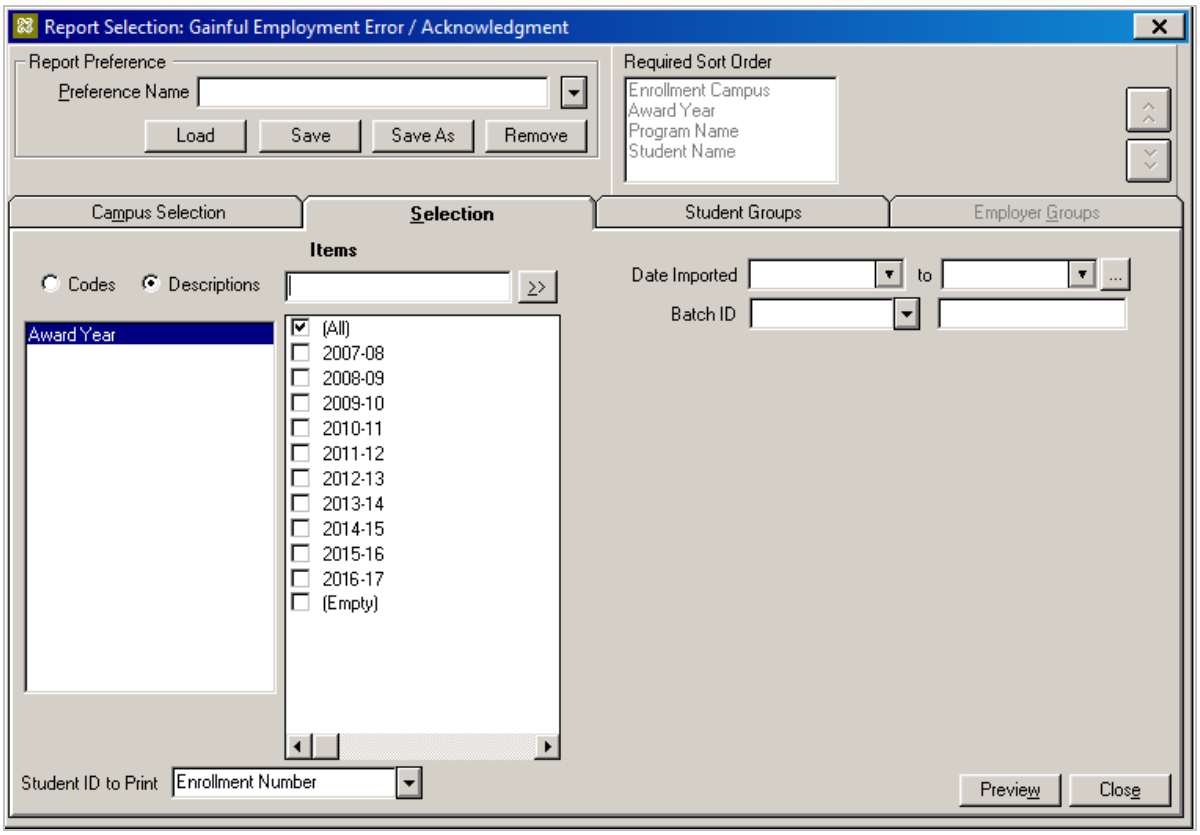
Campus Management
Page 1 of 3

Gainful Employment Error/Acknowledgement

This report is used to view Gainful Employment (GE) files that were returned from the National Student Loan Data System (NSLDS) and that you previously imported using the Gainful Employment Import feature.

To run the report:

1. Navigate to **Reports > Academic Records > Gainful Employment Error/Acknowledgement**. The Report Selection: Gainful Employment Error/Acknowledgement form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

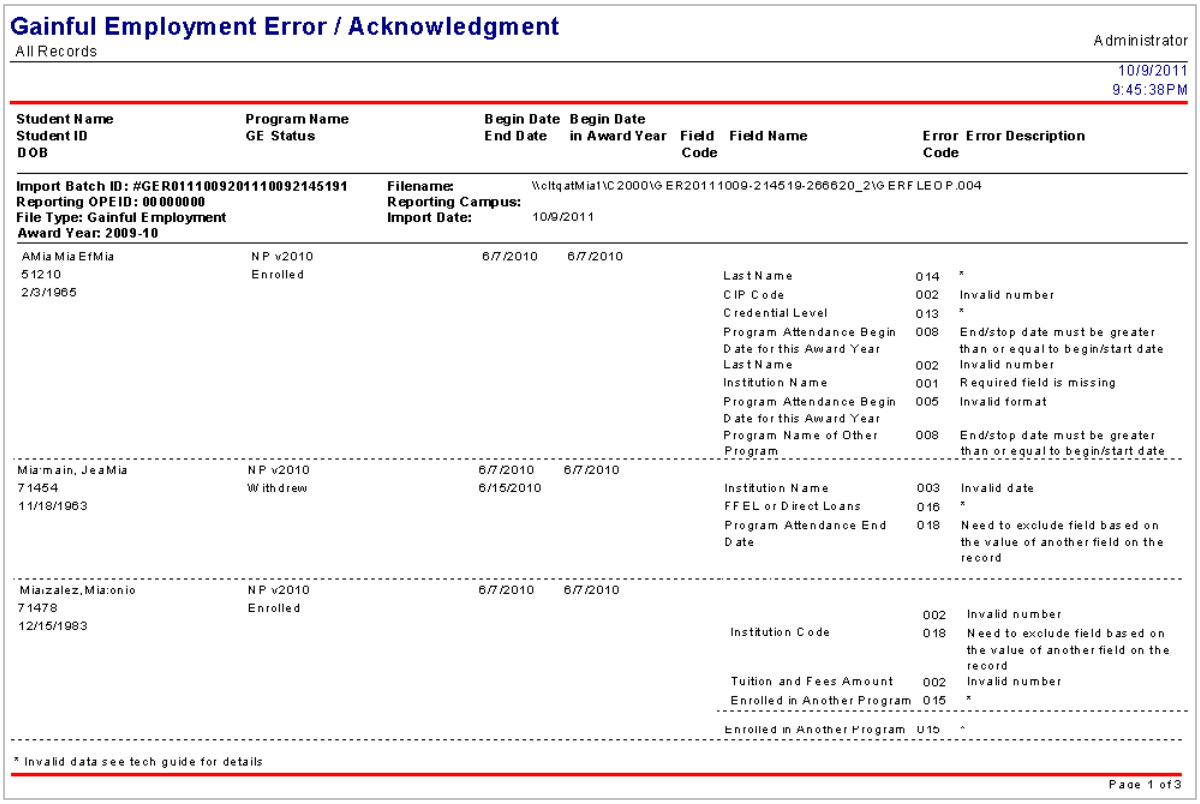
   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Student ID
   - Date of birth (DOB)
   - Program Name
   - Gainful Employment (GE) Status

- Begin and End Date
- Begin Date in Award Year
- Field Code
- Field Name
- Error Code
- Error Description
- Import Batch ID
- Reporting OPEID
- File Type
- Award Year
- File Name
- Reporting Campus
- Import Date



Gainful Employment Error / Acknowledgment

All Records

Administrator

10/9/2011
9:45:38PM

Student Name / Student ID / DOB	Program Name / GE Status	Begin Date / End Date	Begin Date in Award Year	Field Code	Field Name	Error Code	Error Description
Import Batch ID: #GER01110092011100921451 91 **Reporting OPEID: 00000000** **File Type: Gainful Employment** **Award Year: 2009-10**		**Filename:** **Reporting Campus:** **Import Date:**	\\cltqatMia1\C2000\GER20111009-214519-266620_2\GERFLEOP.004 10/9/2011				
AMiaMiaEfMia 51210 2/3/1965	NPv2010 Enrolled	6/7/2010	6/7/2010		Last Name	014	*
					CIP Code	002	Invalid number
					Credential Level	013	*
					Program Attendance Begin Date for this Award Year	008	End/stop date must be greater than or equal to begin/start date
					Last Name	002	Invalid number
					Institution Name	001	Required field is missing
					Program Attendance Begin Date for this Award Year	005	Invalid format
					Program Name of Other Program	008	End/stop date must be greater than or equal to begin/start date
Miamain, JeaMia 71454 11/18/1963	NPv2010 Withdrew	6/7/2010 6/15/2010	6/7/2010		Institution Name	003	Invalid date
					FFEL or Direct Loans	016	*
					Program Attendance End Date	018	Need to exclude field based on the value of another field on the record
Miarzalez,Miaonio 71478 12/15/1983	NPv2010 Enrolled	6/7/2010	6/7/2010			002	Invalid number
					Institution Code	018	Need to exclude field based on the value of another field on the record
					Tuition and Fees Amount	002	Invalid number
					Enrolled in Another Program	015	*
					Enrolled in Another Program	015	*

* Invalid data see tech guide for details

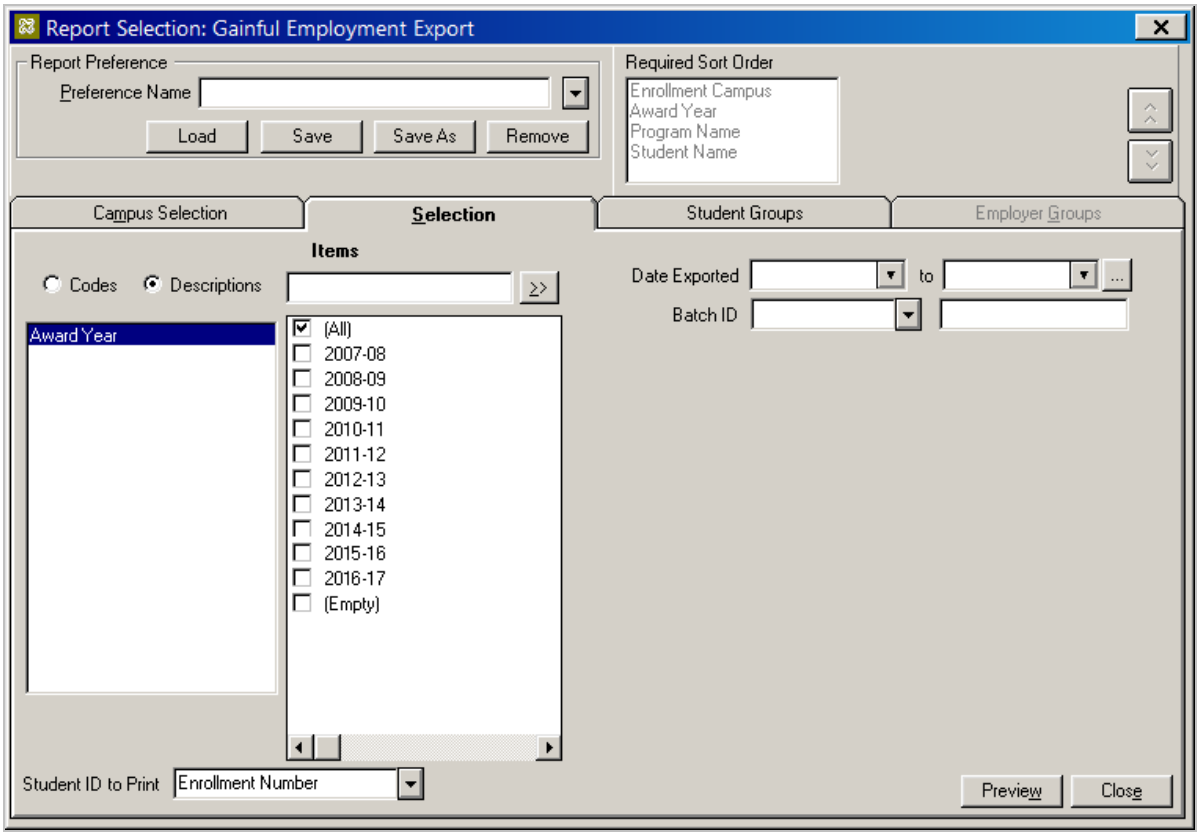
Page 1 of 3

Gainful Employment Export

This report is used to display Gainful Employment data that was previously exported.

To run the report:

1. Navigate to **Reports > Academic Records > Gainful Employment Export**. The Report Selection: Gainful Employment Export form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

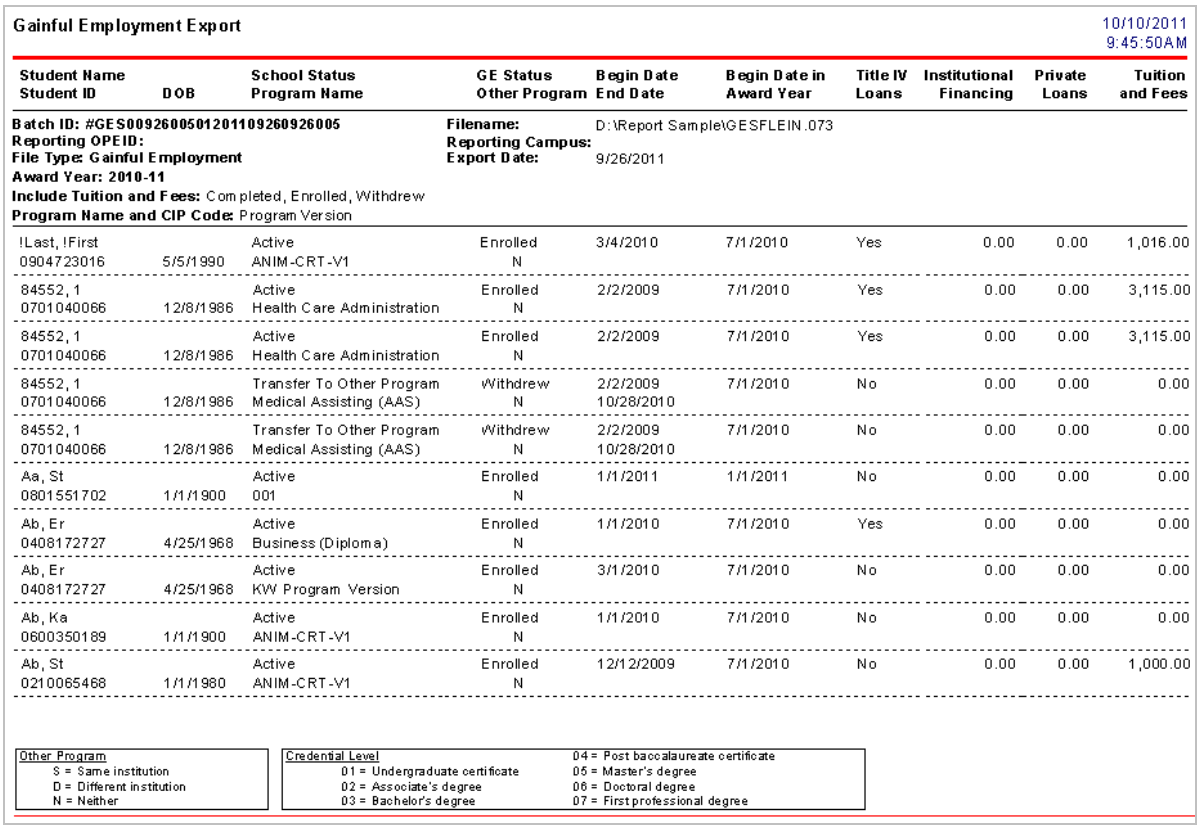
   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Student ID
   - Date of birth (DOB)
   - School Status
   - Program Name
   - Gainful Employment (GE) Status

- Other Program
- Begin and End Date
- Begin Date in Award Year
- Title IV Loans
- Institutional Financing
- Private Loans
- Tuition and Fees
- Batch ID
- Reporting OPEID
- File Type
- Award Year
- Include Tuition and Fees
- Program Name and CIP Code
- File Name
- Reporting Campus
- Export Date



Gainful Employment Export 10/10/2011 9:45:50AM

Student Name / Student ID	DOB	School Status / Program Name	GE Status / Other Program	Begin Date / End Date	Begin Date in Award Year	Title IV Loans	Institutional Financing	Private Loans	Tuition and Fees
Batch ID: #GES00926005012011092609260005			**Filename:**	D:\Report Sample\GESFLEIN.073					
Reporting OPEID:			**Reporting Campus:**						
File Type: Gainful Employment			**Export Date:**	9/26/2011					
Award Year: 2010-11									
Include Tuition and Fees: Completed, Enrolled, Withdrew									
Program Name and CIP Code: Program Version									
!Last, !First		Active	Enrolled	3/4/2010	7/1/2010	Yes	0.00	0.00	1,016.00
0904723016	5/5/1990	ANIM-CRT-V1	N						
84552, 1		Active	Enrolled	2/2/2009	7/1/2010	Yes	0.00	0.00	3,115.00
0701040066	12/8/1986	Health Care Administration	N						
84552, 1		Active	Enrolled	2/2/2009	7/1/2010	Yes	0.00	0.00	3,115.00
0701040066	12/8/1986	Health Care Administration	N						
84552, 1		Transfer To Other Program	Withdrew	2/2/2009	7/1/2010	No	0.00	0.00	0.00
0701040066	12/8/1986	Medical Assisting (AAS)	N	10/28/2010					
84552, 1		Transfer To Other Program	Withdrew	2/2/2009	7/1/2010	No	0.00	0.00	0.00
0701040066	12/8/1986	Medical Assisting (AAS)	N	10/28/2010					
Aa, St		Active	Enrolled	1/1/2011	1/1/2011	No	0.00	0.00	0.00
0801551702	1/1/1900	001	N						
Ab, Er		Active	Enrolled	1/1/2010	7/1/2010	Yes	0.00	0.00	0.00
0408172727	4/25/1968	Business (Diploma)	N						
Ab, Er		Active	Enrolled	3/1/2010	7/1/2010	No	0.00	0.00	0.00
0408172727	4/25/1968	KW Program Version	N						
Ab, Ka		Active	Enrolled	1/1/2010	7/1/2010	No	0.00	0.00	0.00
0600350189	1/1/1900	ANIM-CRT-V1	N						
Ab, St		Active	Enrolled	12/12/2009	7/1/2010	No	0.00	0.00	1,000.00
0210065468	1/1/1980	ANIM-CRT-V1	N						

Other Program
S = Same institution
D = Different institution
N = Neither

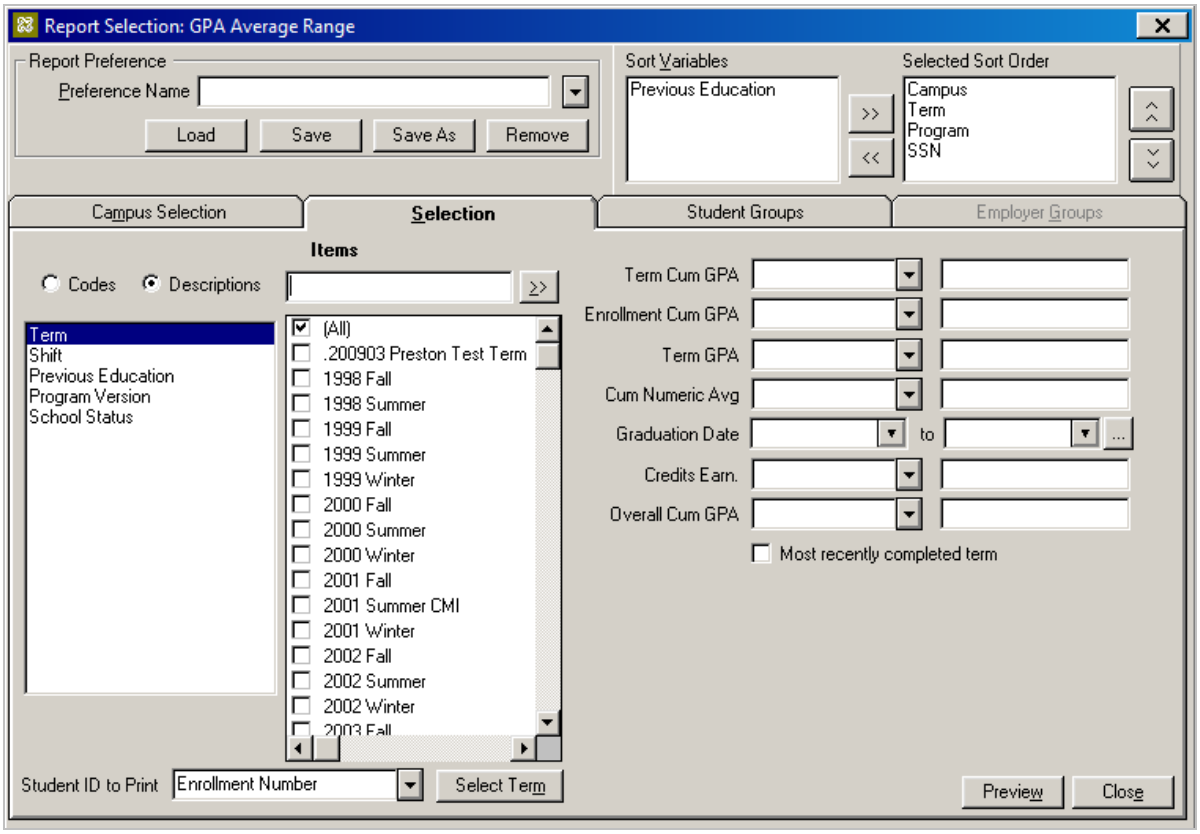
Credential Level
01 = Undergraduate certificate
02 = Associate's degree
03 = Bachelor's degree
04 = Post baccalaureate certificate
05 = Master's degree
06 = Doctoral degree
07 = First professional degree

GPA Average Range

This report lists students within a given range of Grade Point Averages (GPAs).

To run the report:

1. Navigate to **Reports > Academic Records > GPA Average Range**. The Report Selection: GPA Average Range form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

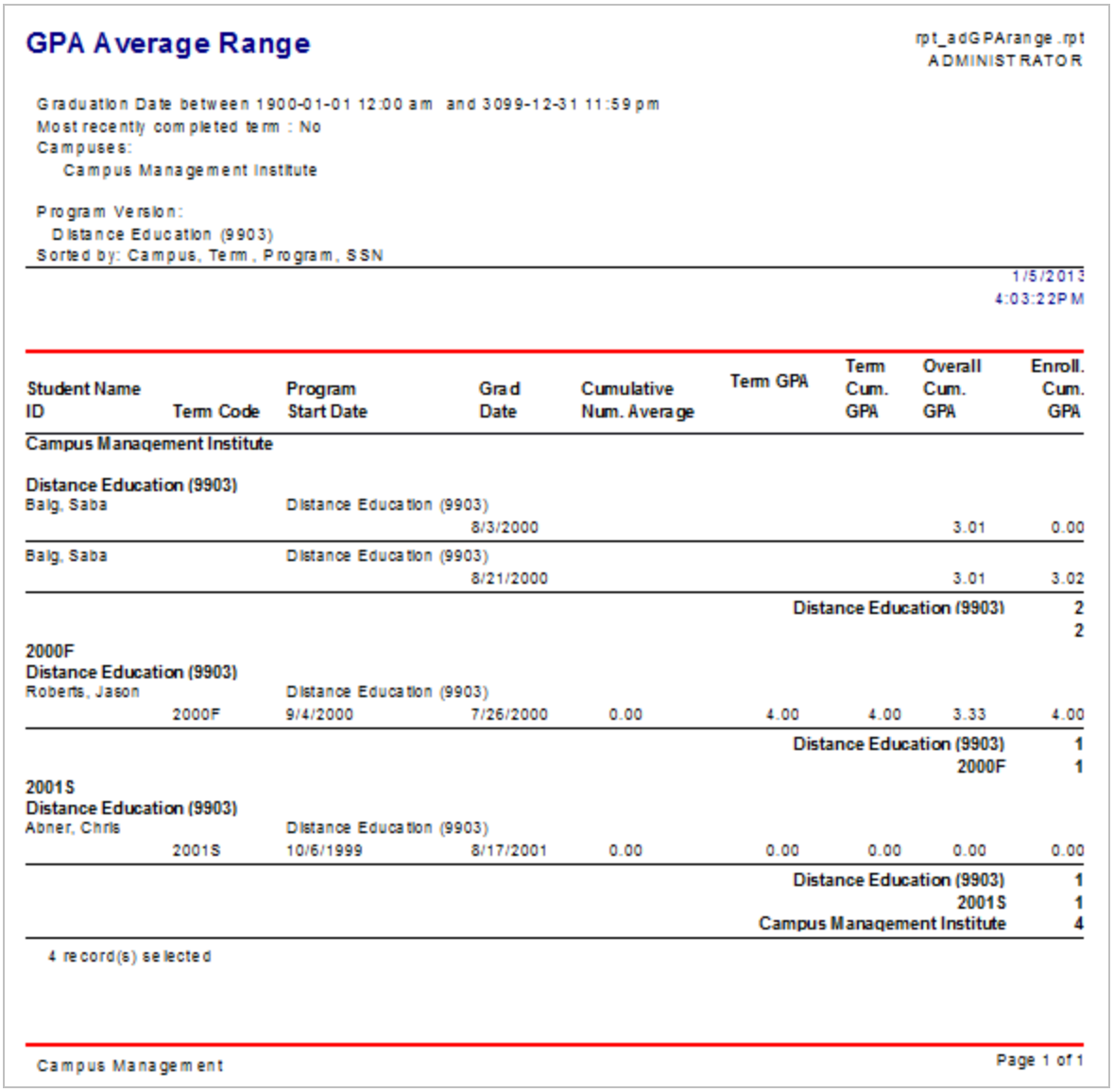
   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   For each student listed the report displays the following:

   - Student ID
   - Student Name
   - Term Code
   - Program
   - Start Date
   - Graduation Date

- Cumulative Numeric Average
- Term GPA
- Term Cumulative GPA
- Overall Cumulative GPA
- Enrollment Cumulative GPA



GPA Average Range

rpt_adGPArange.rpt
ADMINISTRATOR

Graduation Date between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Most recently completed term : No
Campuses:
Campus Management Institute

Program Version:
Distance Education (9903)
Sorted by: Campus, Term, Program, SSN

1/5/2013
4:03:22PM

Student Name / ID	Term Code	Program / Start Date	Grad Date	Cumulative Num. Average	Term GPA	Term Cum. GPA	Overall Cum. GPA	Enroll. Cum. GPA
Campus Management Institute								
Distance Education (9903)								
Baig, Saba		Distance Education (9903)						
			8/3/2000				3.01	0.00
Baig, Saba		Distance Education (9903)						
			8/21/2000				3.01	3.02
							Distance Education (9903)	**2**
								2
2000F								
Distance Education (9903)								
Roberts, Jason		Distance Education (9903)						
	2000F	9/4/2000	7/26/2000	0.00	4.00	4.00	3.33	4.00
							Distance Education (9903)	**1**
							2000F	**1**
2001S								
Distance Education (9903)								
Abner, Chris		Distance Education (9903)						
	2001S	10/6/1999	8/17/2001	0.00	0.00	0.00	0.00	0.00
							Distance Education (9903)	**1**
							2001S	**1**
							Campus Management Institute	**4**

4 record(s) selected

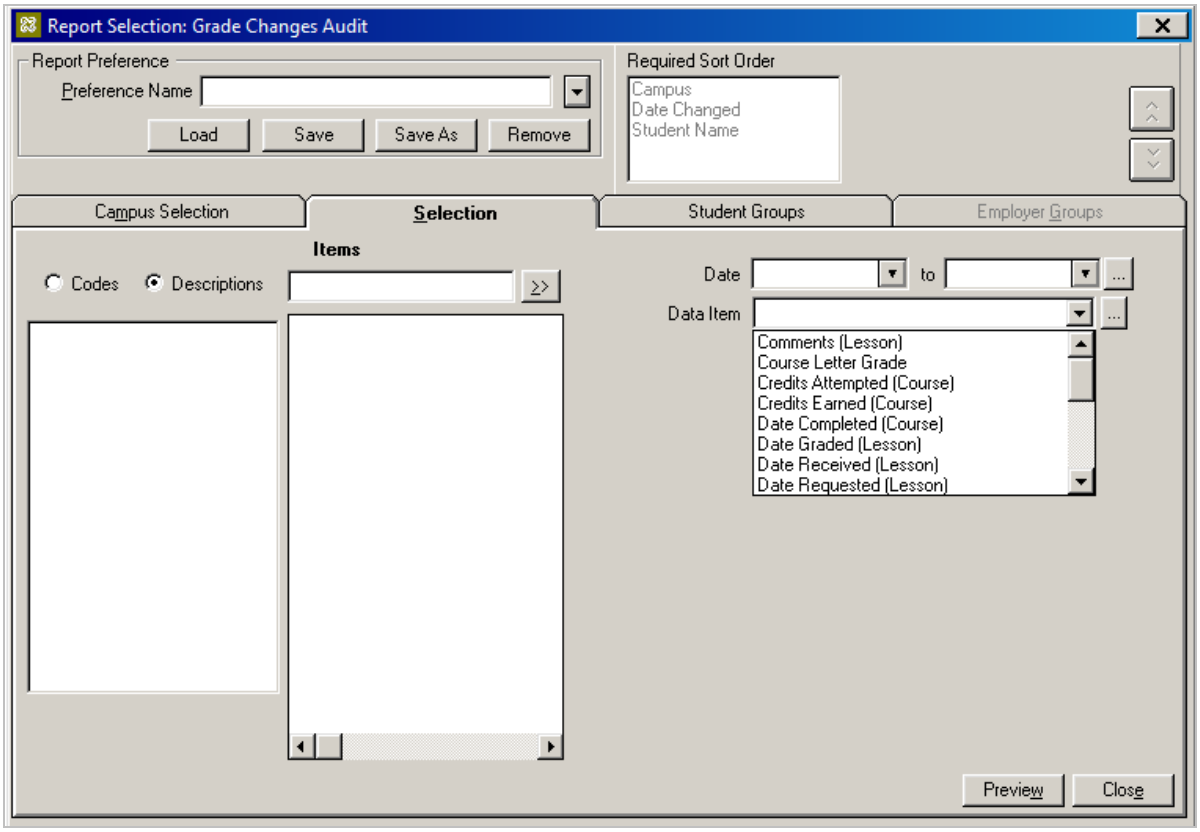
Campus Management
Page 1 of 1

Grade Changes Audit

This report lists changes made to student grades.

To run the report:

1. Navigate to **Reports > Academic Records > Grade Changes Audit**. The Report Selection: Grade Changes Audit form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

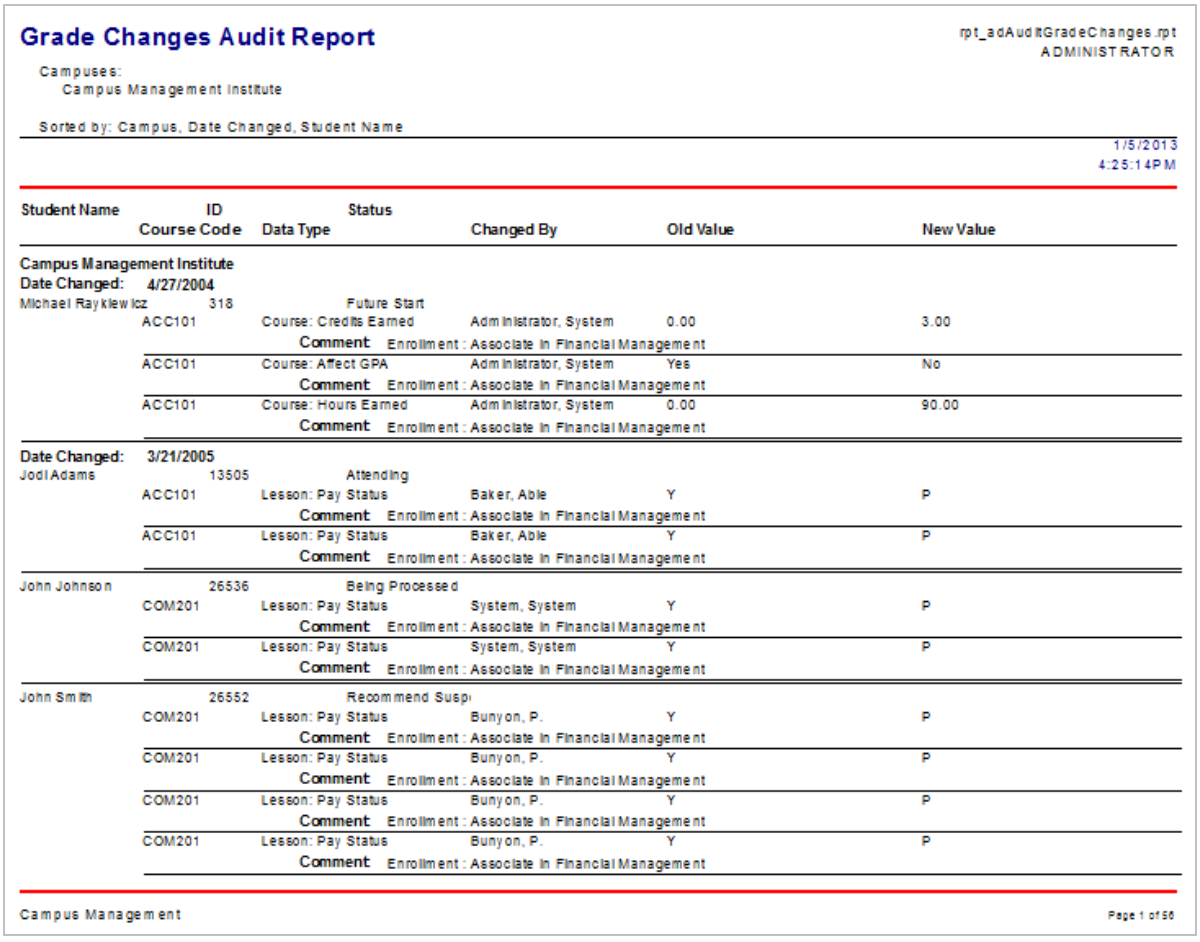
   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   For each student listed the report displays the following:

   - Student Name
   - Student ID
   - Course Code
   - Data Type
   - Status
   - Changed By

- Old Value
- New Value



Grade Changes Audit Report

rpt_adAuditGradeChanges.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute

Sorted by: Campus, Date Changed, Student Name

1/5/2013
4:25:14PM

Student Name	ID / Course Code	Data Type	Changed By	Old Value	New Value
Campus Management Institute					
Date Changed: 4/27/2004					
Michael Rayklewicz	318	Future Start			
	ACC101	Course: Credits Earned	Administrator, System	0.00	3.00
		Comment	Enrollment : Associate in Financial Management		
	ACC101	Course: Affect GPA	Administrator, System	Yes	No
		Comment	Enrollment : Associate in Financial Management		
	ACC101	Course: Hours Earned	Administrator, System	0.00	90.00
		Comment	Enrollment : Associate in Financial Management		
Date Changed: 3/21/2005					
Jodi Adams	13505	Attending			
	ACC101	Lesson: Pay Status	Baker, Able	Y	P
		Comment	Enrollment : Associate in Financial Management		
	ACC101	Lesson: Pay Status	Baker, Able	Y	P
		Comment	Enrollment : Associate in Financial Management		
John Johnson	26536	Being Processed			
	COM201	Lesson: Pay Status	System, System	Y	P
		Comment	Enrollment : Associate in Financial Management		
	COM201	Lesson: Pay Status	System, System	Y	P
		Comment	Enrollment : Associate in Financial Management		
John Smith	26552	Recommend Susp			
	COM201	Lesson: Pay Status	Bunyon, P.	Y	P
		Comment	Enrollment : Associate in Financial Management		
	COM201	Lesson: Pay Status	Bunyon, P.	Y	P
		Comment	Enrollment : Associate in Financial Management		
	COM201	Lesson: Pay Status	Bunyon, P.	Y	P
		Comment	Enrollment : Associate in Financial Management		
	COM201	Lesson: Pay Status	Bunyon, P.	Y	P
		Comment	Enrollment : Associate in Financial Management		

Campus Management

Page 1 of 56

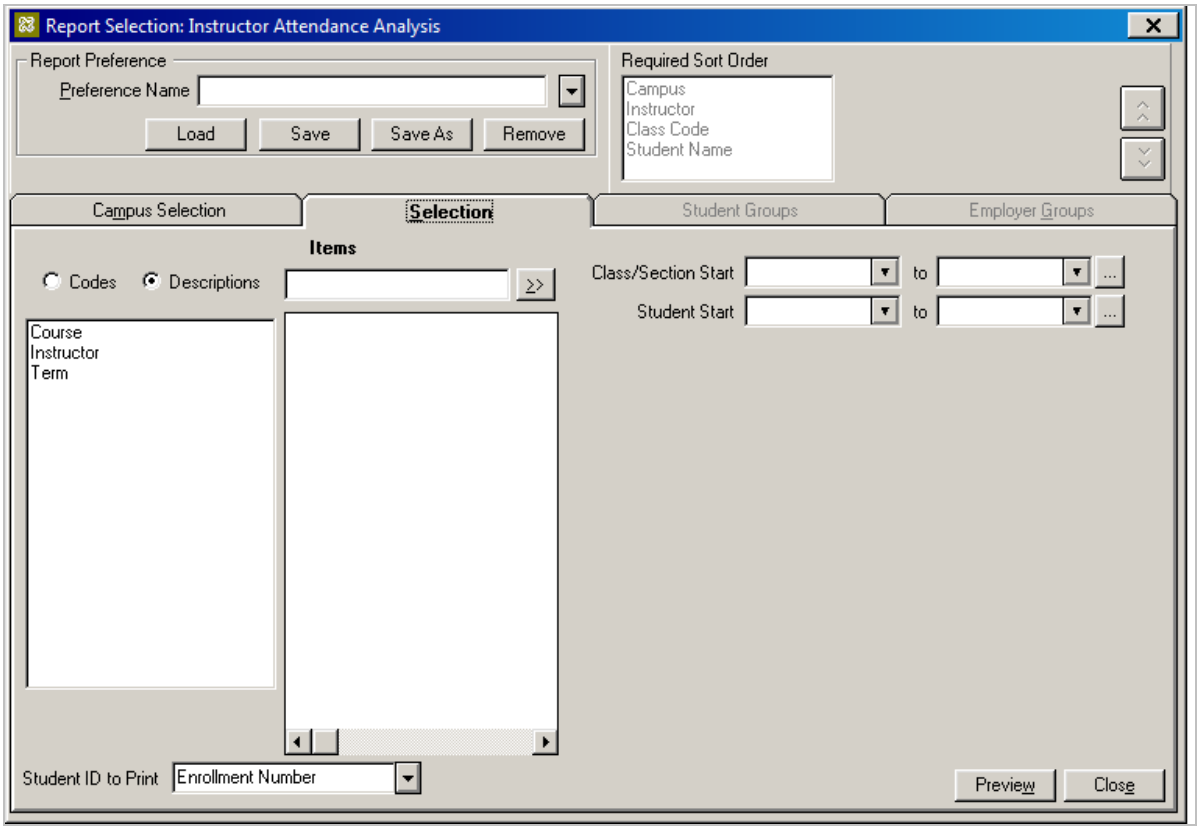
Instructor Attendance Analysis

This report is a summary of student attendance in class sections by instructor.

Note: The report does not list "Dependent" courses or hours.

To run the report:

1. Navigate to **Reports > Academic Records > Instructor Attendance Analysis**. The Report Selection: Instructor Attendance Analysis form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

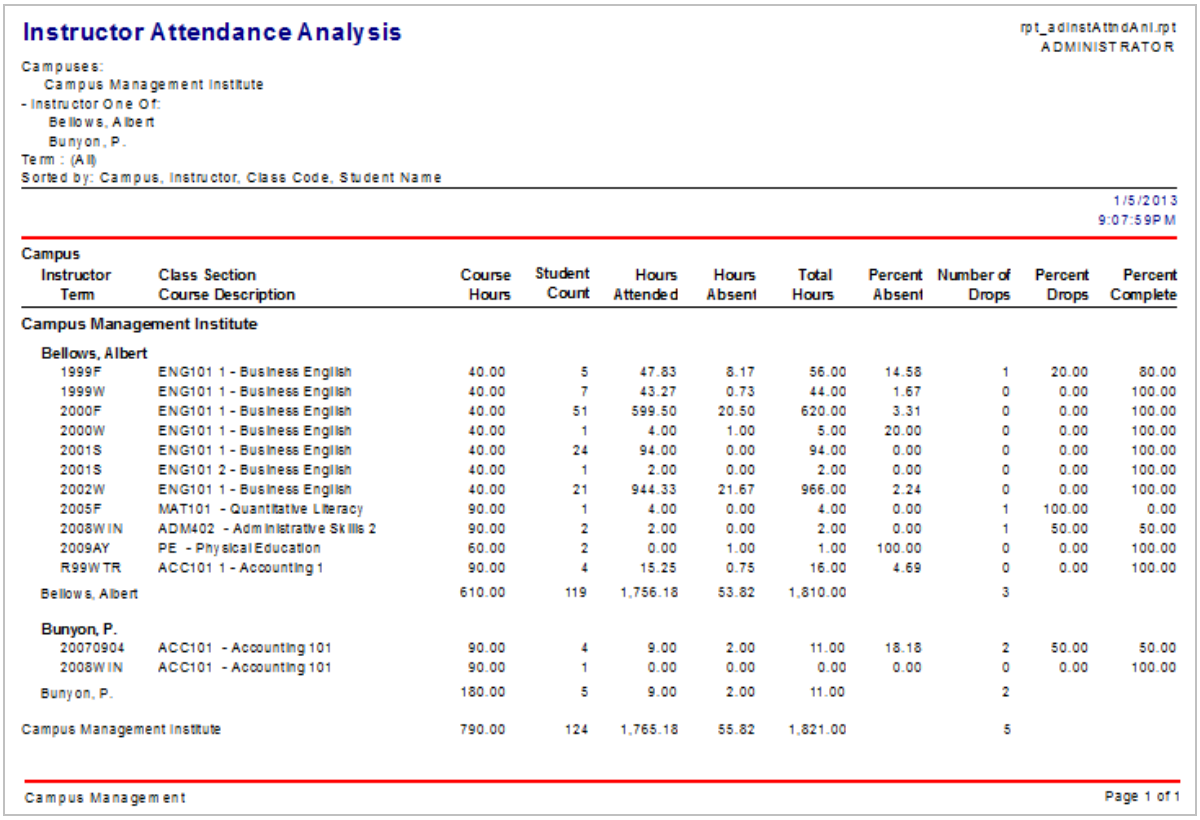


4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Campus
   - Instructor
   - Term
   - Class Section
   - Course Description
   - Course Hours
   - Student Count
   - Hours Attended

- Hours Absent
- Total Hours
- Percent Absent
- Number of Drops
- Percent Drops
- Percent Complete



Instructor Attendance Analysis

rpt_adInstAttndAnl.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- Instructor One Of:
Bellows, Albert
Bunyon, P.
Term : (All)
Sorted by: Campus, Instructor, Class Code, Student Name

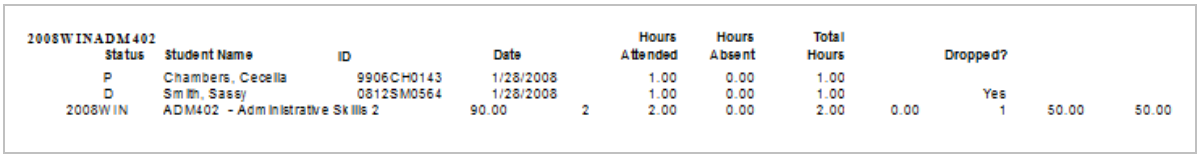
1/5/2013
9:07:59PM

Campus / Instructor / Term	Class Section / Course Description	Course Hours	Student Count	Hours Attended	Hours Absent	Total Hours	Percent Absent	Number of Drops	Percent Drops	Percent Complete
Campus Management Institute										
Bellows, Albert										
1999F	ENG101 1 - Business English	40.00	5	47.83	8.17	56.00	14.58	1	20.00	80.00
1999W	ENG101 1 - Business English	40.00	7	43.27	0.73	44.00	1.67	0	0.00	100.00
2000F	ENG101 1 - Business English	40.00	51	599.50	20.50	620.00	3.31	0	0.00	100.00
2000W	ENG101 1 - Business English	40.00	1	4.00	1.00	5.00	20.00	0	0.00	100.00
2001S	ENG101 1 - Business English	40.00	24	94.00	0.00	94.00	0.00	0	0.00	100.00
2001S	ENG101 2 - Business English	40.00	1	2.00	0.00	2.00	0.00	0	0.00	100.00
2002W	ENG101 1 - Business English	40.00	21	944.33	21.67	966.00	2.24	0	0.00	100.00
2005F	MAT101 - Quantitative Literacy	90.00	1	4.00	0.00	4.00	0.00	1	100.00	0.00
2008WIN	ADM402 - Administrative Skills 2	90.00	2	2.00	0.00	2.00	0.00	1	50.00	50.00
2009AY	PE - Physical Education	60.00	2	0.00	1.00	1.00	100.00	0	0.00	100.00
R99WTR	ACC101 1 - Accounting 1	90.00	4	15.25	0.75	16.00	4.69	0	0.00	100.00
Bellows, Albert		610.00	119	1,756.18	53.82	1,810.00		3		
Bunyon, P.										
20070904	ACC101 - Accounting 101	90.00	4	9.00	2.00	11.00	18.18	2	50.00	50.00
2008WIN	ACC101 - Accounting 101	90.00	1	0.00	0.00	0.00	0.00	0	0.00	100.00
Bunyon, P.		180.00	5	9.00	2.00	11.00		2		
Campus Management Institute		790.00	124	1,765.18	55.82	1,821.00		5		

Campus Management

Page 1 of 1

The report allows you to drill down to view the students within a section along with the number of hours attended, absent, and scheduled (absent + attended).



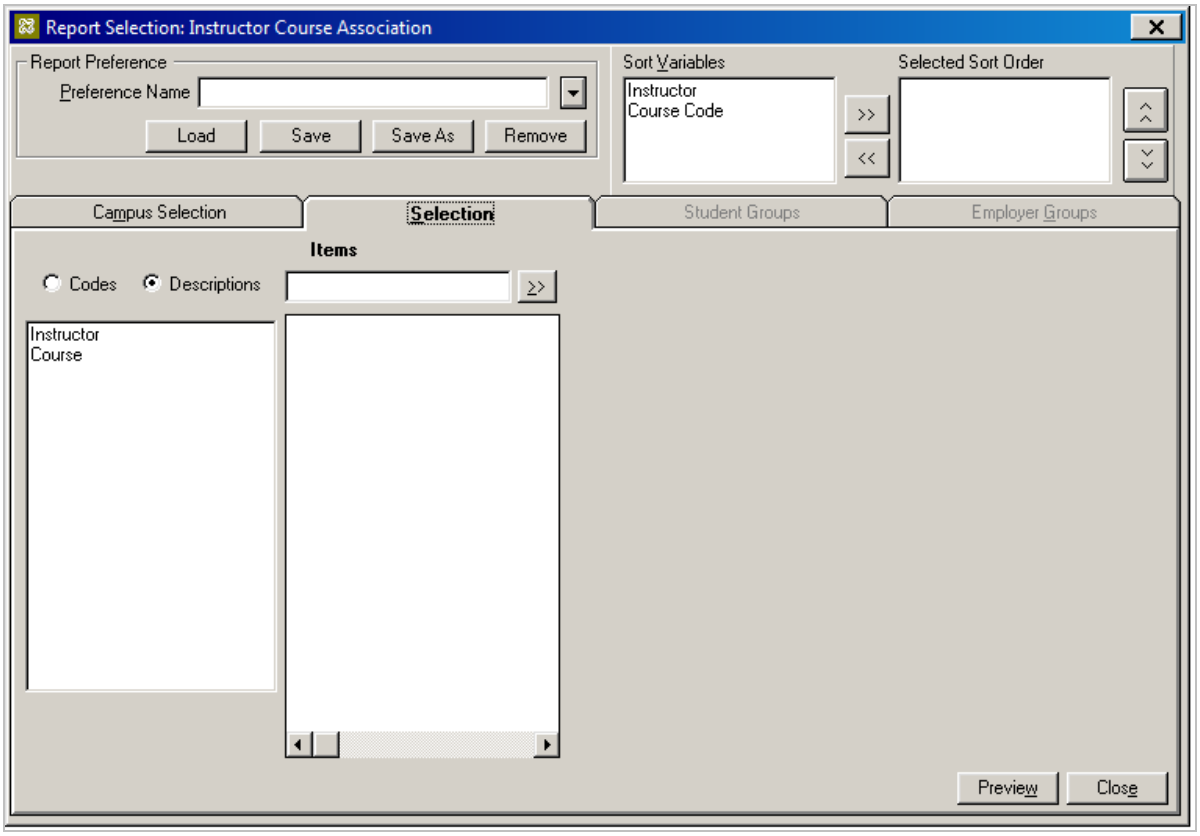
2008WINADM402 Status	Student Name	ID	Date		Hours Attended	Hours Absent	Total Hours		Dropped?		
P	Chambers, Cecelia	9906CH0143	1/28/2008		1.00	0.00	1.00				
D	Smith, Sassy	0812SM0564	1/28/2008		1.00	0.00	1.00		Yes		
2008WIN	ADM402 - Administrative Skills 2		90.00	2	2.00	0.00	2.00	0.00	1	50.00	50.00

Instructor Course Association

This report contains a list of associations between courses and instructors.

To run the report:

1. Navigate to **Reports > Academic Records > Instructor Course Association**. The Report Selection: Instructor Course Association form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

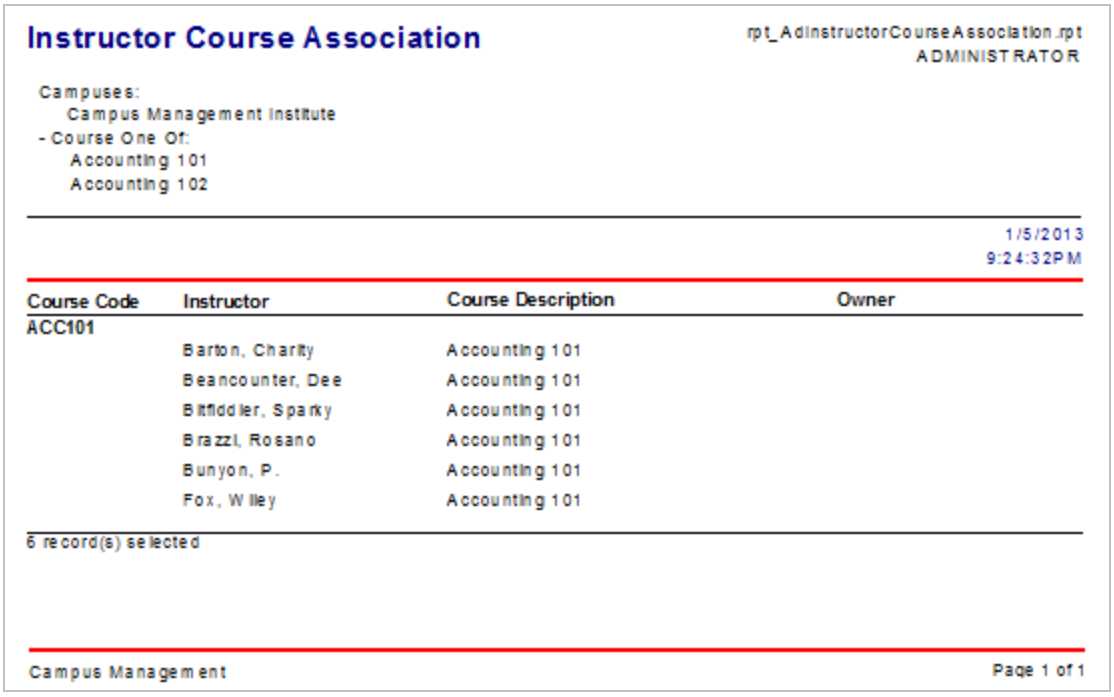


4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Course Code
   - Instructor
   - Course Description

- Owner



Instructor Course Association

rpt_AdInstructorCourseAssociation.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- Course One Of:
Accounting 101
Accounting 102

1/5/2013
9:24:32PM

Course Code	Instructor	Course Description	Owner
ACC101			
	Barton, Charity	Accounting 101	
	Beancounter, Dee	Accounting 101	
	Bitfiddler, Sparky	Accounting 101	
	Brazzi, Rosano	Accounting 101	
	Bunyon, P.	Accounting 101	
	Fox, Wiley	Accounting 101	

6 record(s) selected

Campus Management
Page 1 of 1

Instructor Drop Analysis

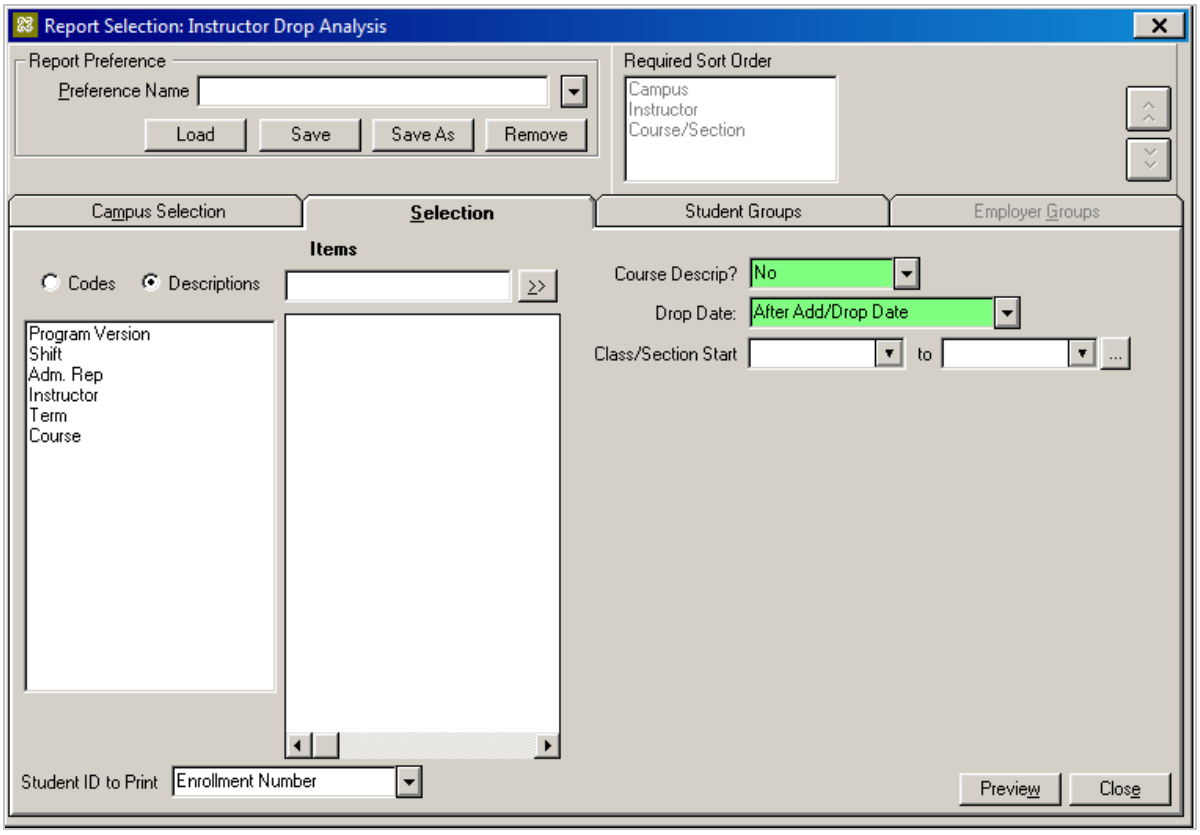
This report provides the drop count, student attrition percentage, and class filled percentage for instructors and courses/sections.

To run the report:

1. Navigate to **Reports > Academic Records > Instructor Drop Analysis**. The Report Selection: Instructor Drop Analysis form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Notes: Specify the Drop Date to include or exclude students based on the following values:

   - **After Add/Drop Date**: Select this value to exclude all students dropped after the Term Drop date.
   - **Within class begin and end dates**: Select this value to include all students dropped within the date range specified for the Class/Section Start list.



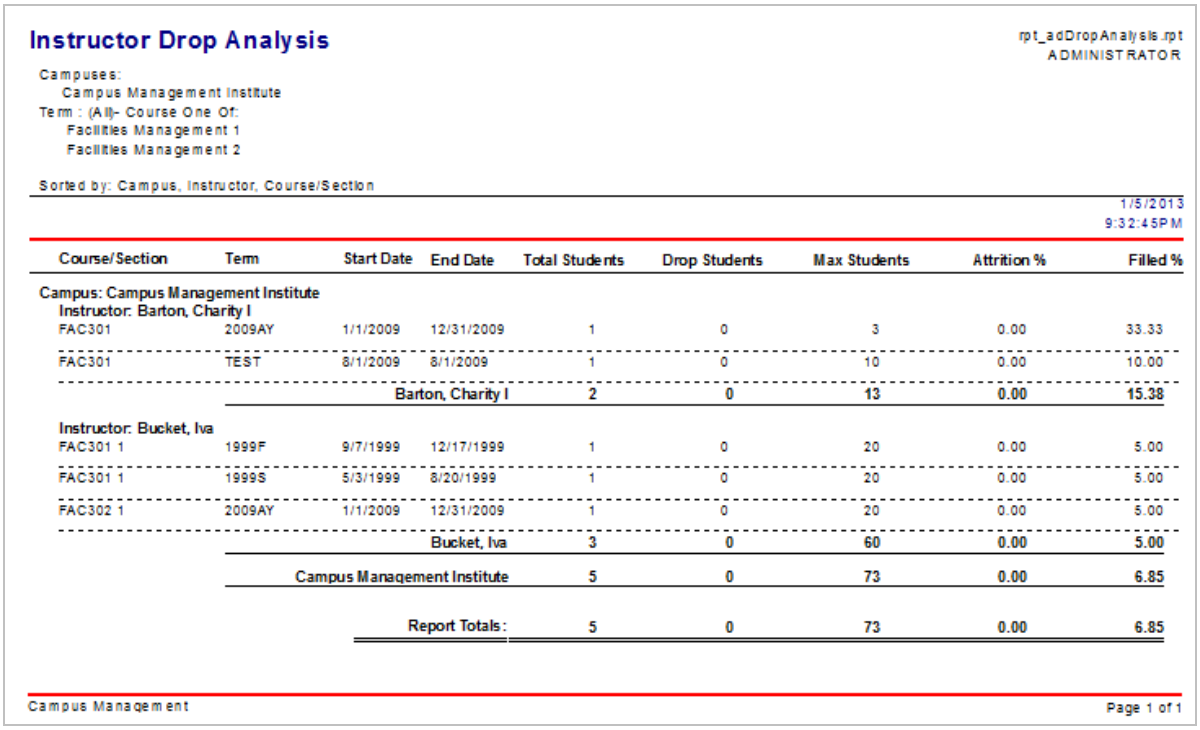
4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

- Course/Section
- Term
- Start and End Dates
- Total Students
- Drop Students
- Maximum Students
- Attrition Percentage
- Filled Percentage



Instructor Drop Analysis

rpt_adDropAnalysis.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
Term : (All)- Course One Of:
Facilities Management 1
Facilities Management 2

Sorted by: Campus, Instructor, Course/Section

1/5/2013
9:32:45PM

Course/Section	Term	Start Date	End Date	Total Students	Drop Students	Max Students	Attrition %	Filled %
Campus: Campus Management Institute								
Instructor: Barton, Charity I								
FAC301	2009AY	1/1/2009	12/31/2009	1	0	3	0.00	33.33
FAC301	TEST	8/1/2009	8/1/2009	1	0	10	0.00	10.00
			Barton, Charity I	2	0	13	0.00	15.38
Instructor: Bucket, Iva								
FAC301 1	1999F	9/7/1999	12/17/1999	1	0	20	0.00	5.00
FAC301 1	1999S	5/3/1999	8/20/1999	1	0	20	0.00	5.00
FAC302 1	2009AY	1/1/2009	12/31/2009	1	0	20	0.00	5.00
			Bucket, Iva	3	0	60	0.00	5.00
			Campus Management Institute	5	0	73	0.00	6.85
			Report Totals:	5	0	73	0.00	6.85

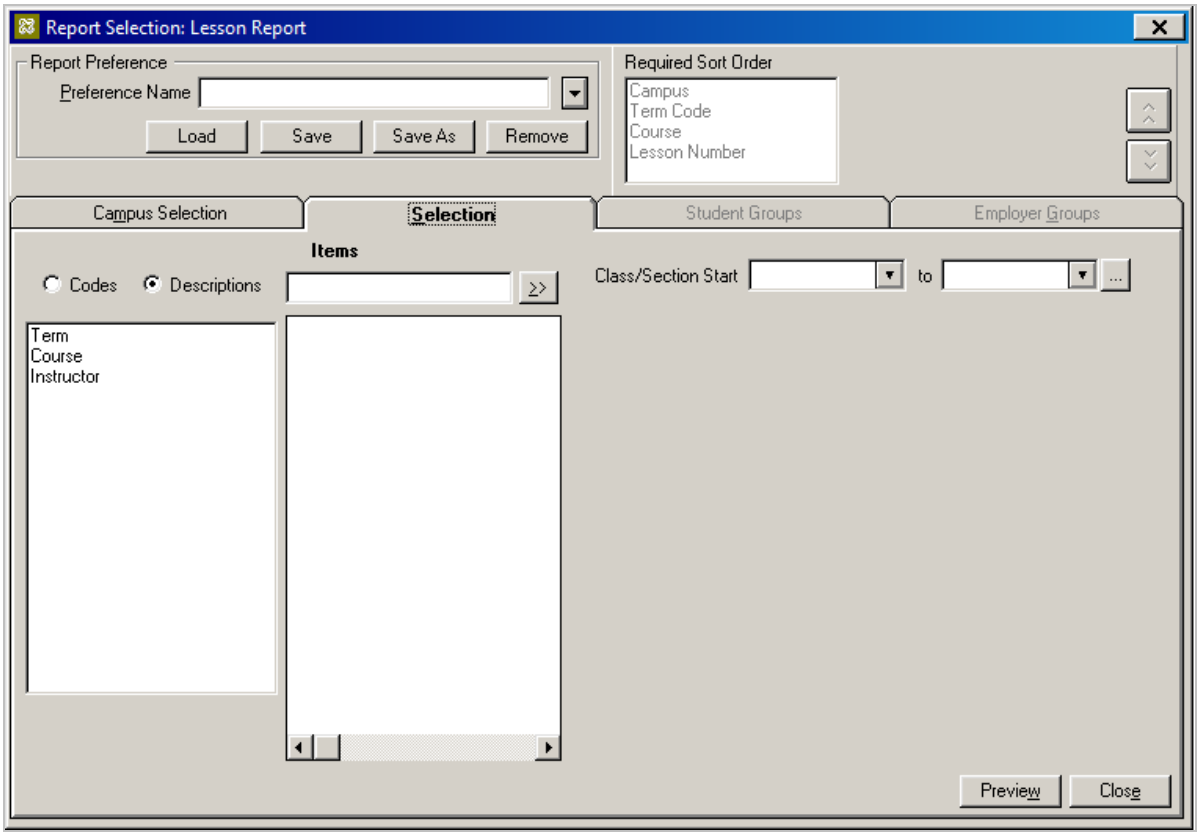
Campus Management
Page 1 of 1

Lesson Report

This report provides information about the lessons in a course.

To run the report:

1. Navigate to **Reports > Academic Records > Lesson Report**. The Report Selection: Lesson Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

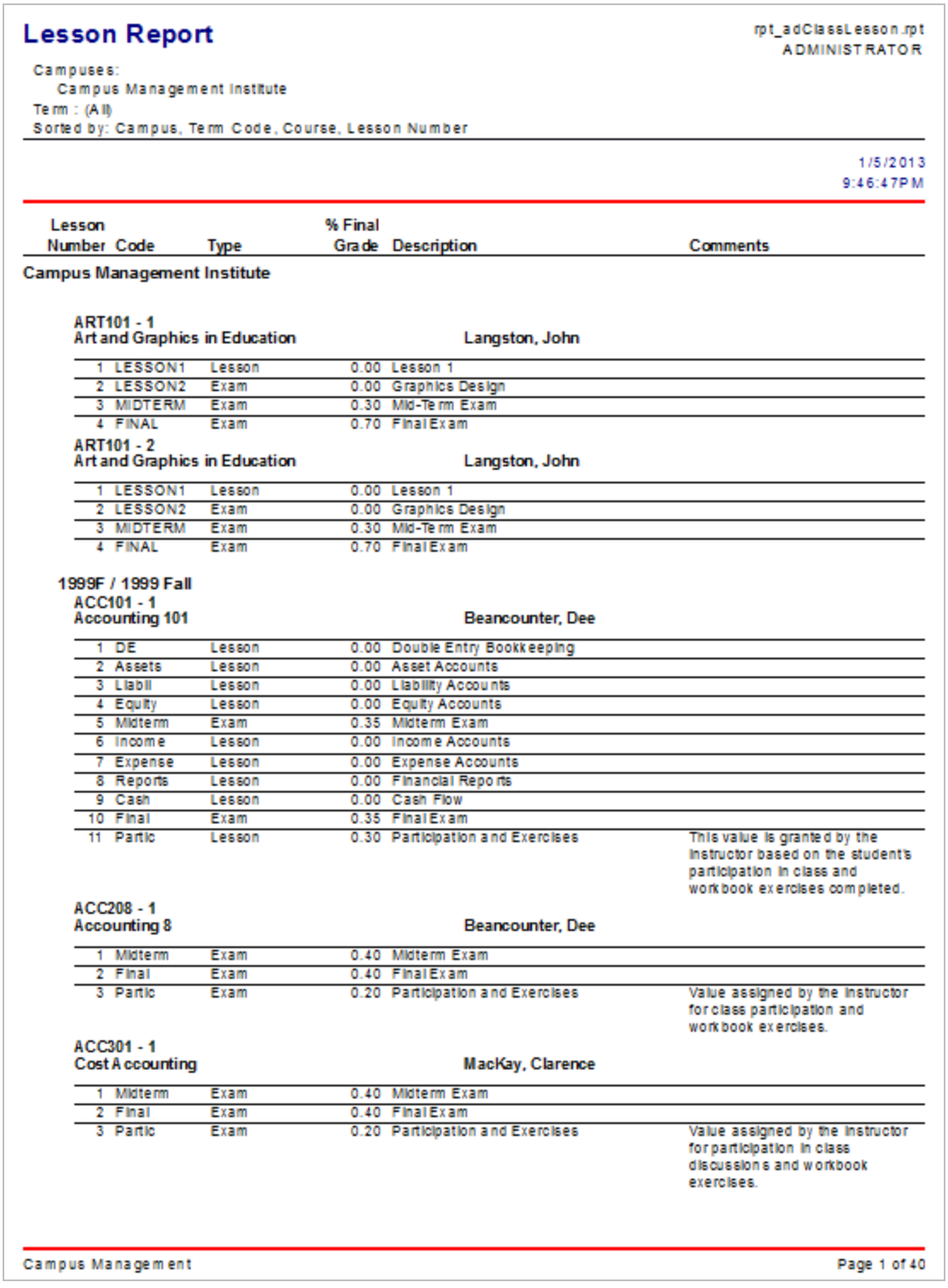


4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Lesson Number
   - Course Code
   - Lesson Type
   - Percent of Final Grade
   - Description
   - Comments
   - Campus

- Instructor



Lesson Report

rpt_adClassLesson.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
Term : (All)
Sorted by: Campus, Term Code, Course, Lesson Number

1/5/2013
9:46:47PM

Lesson Number	Code	Type	% Final Grade	Description	Comments
Campus Management Institute					
ART101 - 1 Art and Graphics in Education				Langston, John	
1	LESSON1	Lesson	0.00	Lesson 1	
2	LESSON2	Exam	0.00	Graphics Design	
3	MIDTERM	Exam	0.30	Mid-Term Exam	
4	FINAL	Exam	0.70	Final Exam	
ART101 - 2 Art and Graphics in Education				Langston, John	
1	LESSON1	Lesson	0.00	Lesson 1	
2	LESSON2	Exam	0.00	Graphics Design	
3	MIDTERM	Exam	0.30	Mid-Term Exam	
4	FINAL	Exam	0.70	Final Exam	
1999F / 1999 Fall					
ACC101 - 1 Accounting 101				Beancounter, Dee	
1	DE	Lesson	0.00	Double Entry Bookkeeping	
2	Assets	Lesson	0.00	Asset Accounts	
3	Liabil	Lesson	0.00	Liability Accounts	
4	Equity	Lesson	0.00	Equity Accounts	
5	Midterm	Exam	0.35	Midterm Exam	
6	Income	Lesson	0.00	Income Accounts	
7	Expense	Lesson	0.00	Expense Accounts	
8	Reports	Lesson	0.00	Financial Reports	
9	Cash	Lesson	0.00	Cash Flow	
10	Final	Exam	0.35	Final Exam	
11	Partic	Lesson	0.30	Participation and Exercises	This value is granted by the instructor based on the student's participation in class and workbook exercises completed.
ACC208 - 1 Accounting 8				Beancounter, Dee	
1	Midterm	Exam	0.40	Midterm Exam	
2	Final	Exam	0.40	Final Exam	
3	Partic	Exam	0.20	Participation and Exercises	Value assigned by the instructor for class participation and workbook exercises.
ACC301 - 1 Cost Accounting				MacKay, Clarence	
1	Midterm	Exam	0.40	Midterm Exam	
2	Final	Exam	0.40	Final Exam	
3	Partic	Exam	0.20	Participation and Exercises	Value assigned by the instructor for participation in class discussions and workbook exercises.

Campus Management
Page 1 of 40

Lesson Status

This report is used to track lessons and exams, mostly in Distance Education programs.

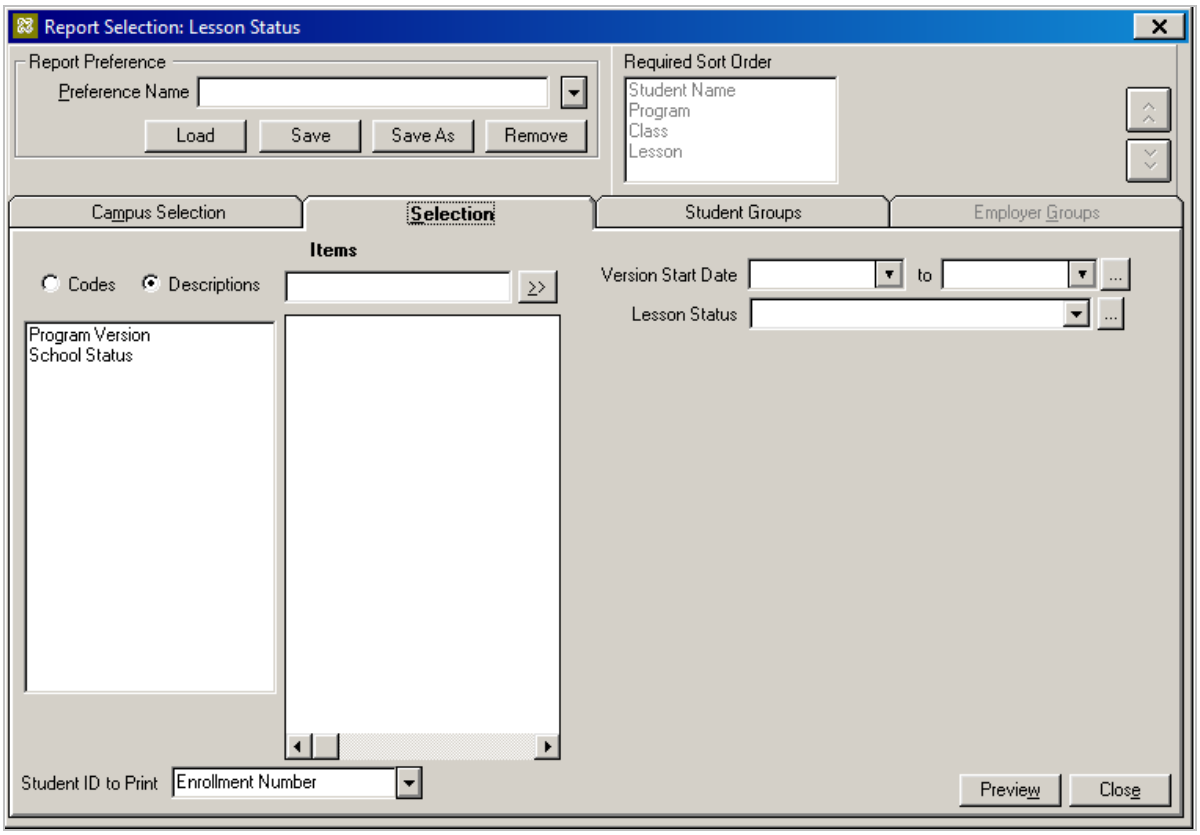
To run the report:

1. Navigate to **Reports > Academic Records > Lesson Status**. The Report Selection: Lesson Status form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Note: The Lesson Status selection can be "On Hold" or blank.

   When you select "On Hold", report lists only those students who have lessons on hold. CampusNexus Student blocks receipt of "held" lessons until the hold is released. To release a held lesson, select the student and navigate to View > Academic Records > Lessons. Select the course and lesson then click "Hold". The "Hold" button changes to "Release". Click "Release".

   An alternative to the procedure described above is to create a "Hold Group". This method does not set the class/-lesson hold flag as described above. That is why lessons do not appear on the report as on hold. The student group hold will keep the lessons from being received or worked with, but they are not actually "On Hold".



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

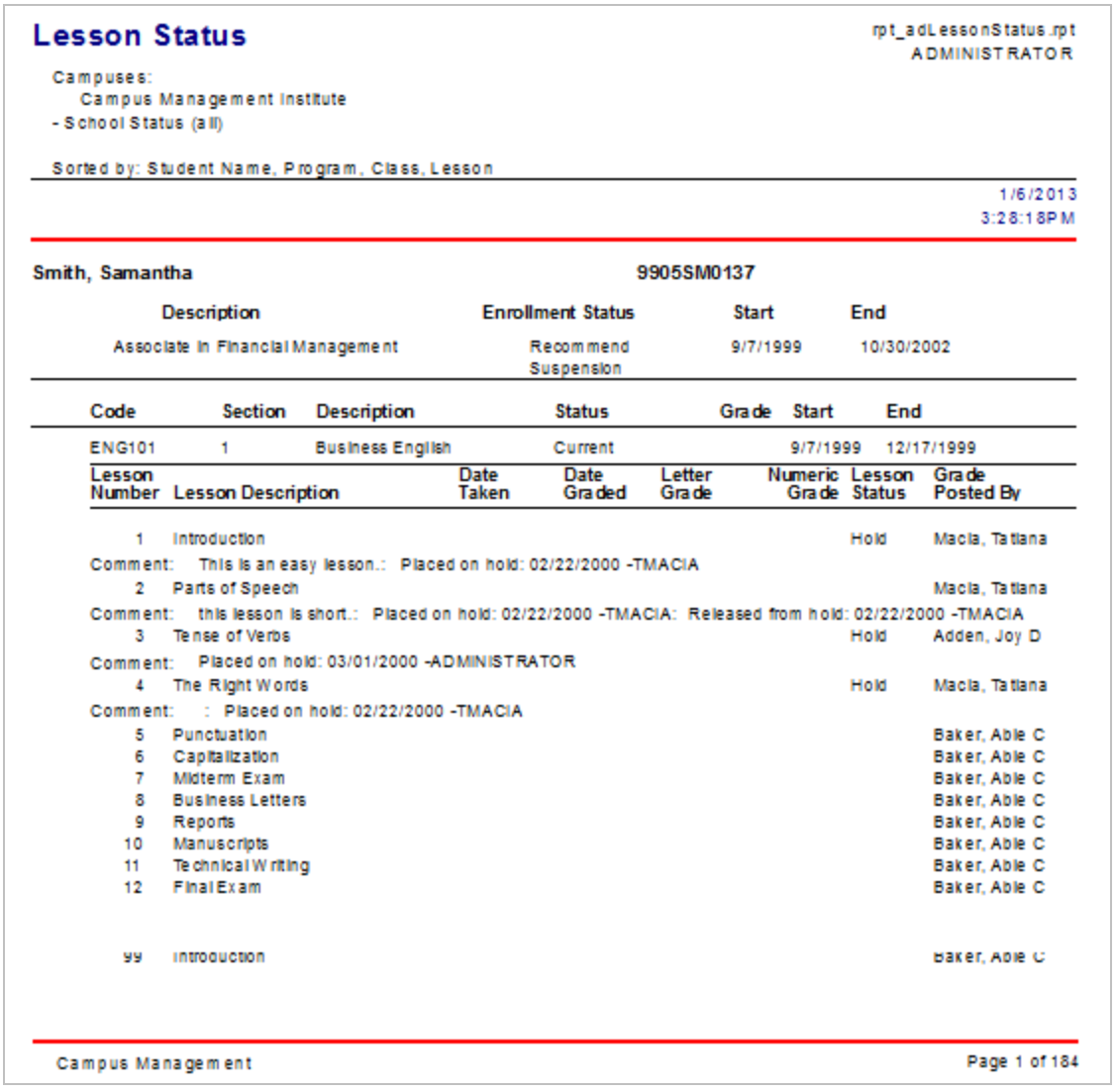
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   For each student in a class section for which lessons and exams are listed, the report displays:

   - Course Code
   - Section
   - Description
   - Status
   - Grade
   - Start and End dates of the class section.

   On the lesson detail lines, the report shows:

   - Lesson Number
   - Lesson Description
   - Date Taken
   - Date Graded
   - Letter Grade
   - Numeric Grade
   - Lesson Status
   - Grade Posted By



Lesson Status

rpt_adLessonStatus.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- School Status (all)

Sorted by: Student Name, Program, Class, Lesson

1/6/2013
3:28:18PM

Smith, Samantha **9905SM0137**

Description	Enrollment Status	Start	End
Associate in Financial Management	Recommend Suspension	9/7/1999	10/30/2002

Code	Section	Description	Status	Grade	Start	End
ENG101	1	Business English	Current		9/7/1999	12/17/1999

Lesson Number	Lesson Description	Date Taken	Date Graded	Letter Grade	Numeric Grade	Lesson Status	Grade Posted By
1	Introduction					Hold	Macia, Tatiana
Comment:	This is an easy lesson.: Placed on hold: 02/22/2000 -TMACIA						
2	Parts of Speech						Macia, Tatiana
Comment:	this lesson is short.: Placed on hold: 02/22/2000 -TMACIA: Released from hold: 02/22/2000 -TMACIA						
3	Tense of Verbs					Hold	Adden, Joy D
Comment:	Placed on hold: 03/01/2000 -ADMINISTRATOR						
4	The Right Words					Hold	Macia, Tatiana
Comment:	: Placed on hold: 02/22/2000 -TMACIA						
5	Punctuation						Baker, Able C
6	Capitalization						Baker, Able C
7	Midterm Exam						Baker, Able C
8	Business Letters						Baker, Able C
9	Reports						Baker, Able C
10	Manuscripts						Baker, Able C
11	Technical Writing						Baker, Able C
12	Final Exam						Baker, Able C
99	Introduction						Baker, Able C

Campus Management

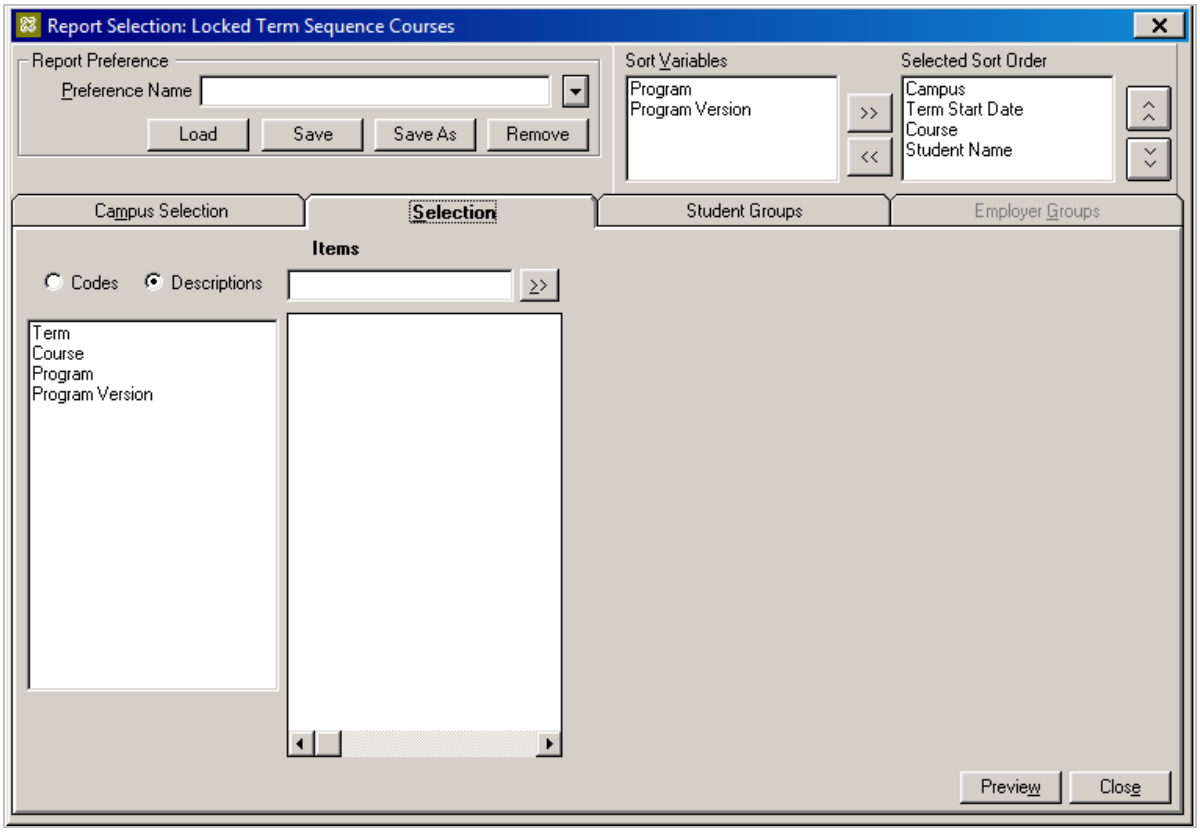
Page 1 of 184

Locked Term Sequence Courses

This report displays the courses that will be needed in a term based on demand created by Term Sequences with locked course sequences. The report show the courses grouped by term and the number of students that require each course. The student counts are based on the number of students enrolled in program versions that have a locked Term Sequence.

To run the report:

1. Navigate to **Reports > Academic Records > Locked Term Sequence Courses**. The Report Selection: Locked Term Sequence Courses form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

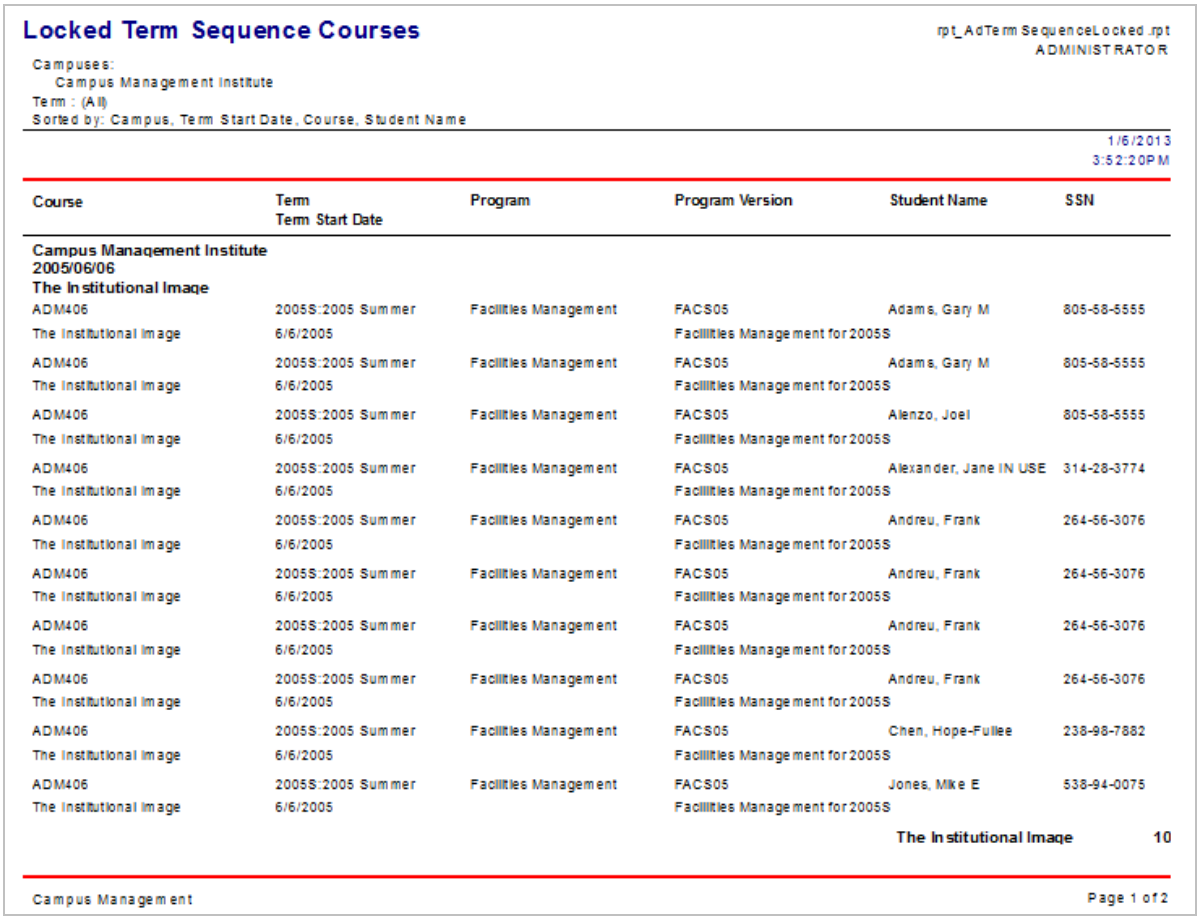
   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Course
   - Term
   - Term Start Date
   - Program
   - Program Version

- Student Name
- SSN



Locked Term Sequence Courses

rpt_AdTermSequenceLocked.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
Term : (All)
Sorted by: Campus, Term Start Date, Course, Student Name

1/6/2013
3:52:20PM

Course	Term Term Start Date	Program	Program Version	Student Name	SSN
Campus Management Institute **2005/06/06** **The Institutional Image**					
ADM406 The Institutional Image	2005S:2005 Summer 6/6/2005	Facilities Management	FACS05 Facilities Management for 2005S	Adams, Gary M	805-58-5555
ADM406 The Institutional Image	2005S:2005 Summer 6/6/2005	Facilities Management	FACS05 Facilities Management for 2005S	Adams, Gary M	805-58-5555
ADM406 The Institutional Image	2005S:2005 Summer 6/6/2005	Facilities Management	FACS05 Facilities Management for 2005S	Alenzo, Joel	805-58-5555
ADM406 The Institutional Image	2005S:2005 Summer 6/6/2005	Facilities Management	FACS05 Facilities Management for 2005S	Alexander, Jane IN USE	314-28-3774
ADM406 The Institutional Image	2005S:2005 Summer 6/6/2005	Facilities Management	FACS05 Facilities Management for 2005S	Andreu, Frank	264-56-3076
ADM406 The Institutional Image	2005S:2005 Summer 6/6/2005	Facilities Management	FACS05 Facilities Management for 2005S	Andreu, Frank	264-56-3076
ADM406 The Institutional Image	2005S:2005 Summer 6/6/2005	Facilities Management	FACS05 Facilities Management for 2005S	Andreu, Frank	264-56-3076
ADM406 The Institutional Image	2005S:2005 Summer 6/6/2005	Facilities Management	FACS05 Facilities Management for 2005S	Andreu, Frank	264-56-3076
ADM406 The Institutional Image	2005S:2005 Summer 6/6/2005	Facilities Management	FACS05 Facilities Management for 2005S	Chen, Hope-Fullee	238-98-7882
ADM406 The Institutional Image	2005S:2005 Summer 6/6/2005	Facilities Management	FACS05 Facilities Management for 2005S	Jones, Mike E	538-94-0075
				The Institutional Image	**10**

Campus Management

Page 1 of 2

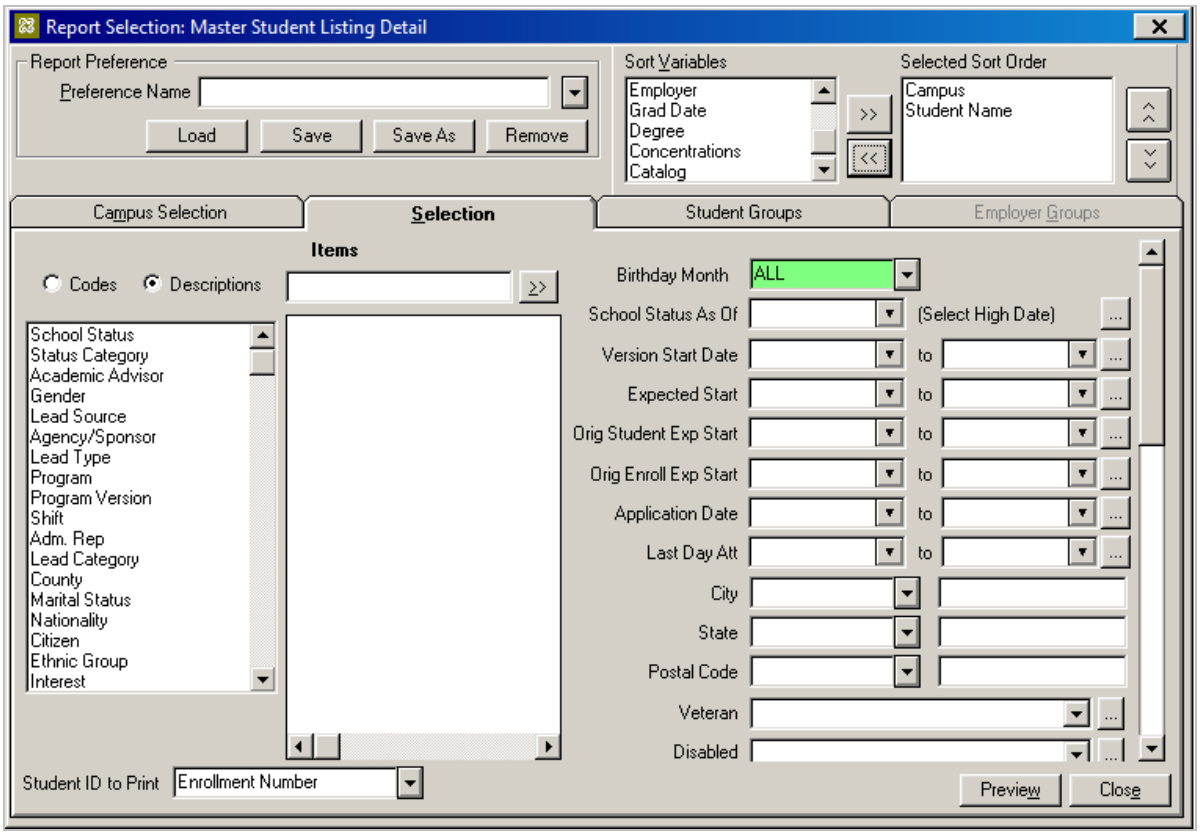
Master Student Listing Detail

This report provides basic demographic information about students, including those who are enrolled but have not yet started classes. This is a popular report because of the long list of selection and sort criteria.

Note: Leads do not appear on Master Student Listing Detail report. For information about leads, use the Admissions > Lead Master Listing Detail report.

To run the report:

1. Navigate to **Reports > Academic Records > Master Student Listing Detail**. The Report Selection: Master Student Listing Detail form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Name
   - Student ID
   - Enrollment ID or SSN

- Email
- Other Email Address
- County
- Country
- Program Version
- Shift
- Lead Source
- Enroll Status
- Degree
- Concentration
- Catalog
- Status
- Admissions Representative
- Previous Education
- Interest
- Academic Advisor
- Expected Credits per Term
- Expected Externship Hours per Week
- Start Date
- Expected Start
- Graduation Date
- Status Date
- Original Enrollment Expected Start
- Original Expected Start
- Phone (Home, Work, Other, Mobile)
- Last Date of Attendance
- Status Reason

Master Student Listing Detail 1/6/2013 4:11:42 PM

Name	Program Version	Status	Start Date	Phone (H)
Student ID	Shift	Adm Rep	Exp Start	Phone (W)
Email	Lead Source	Previous Educ	Grad Date	Phone (Oth)
Other Email	Enroll Status	Interest		Phone (M)
Address	Degree	Academic Advisor	Status Date	LDA
County	Concentration(s)	Exp. Credits per Term	Orig Enroll Exp Start	Status Reason
Country	Catalog	Exp. Extern. Hours per Week	Original Exp Start	
cabner@aollsslow.com	High School	High School	8/17/2001	
	Less Than Half Time	General Management		
7500 W. 10th Ave. #2A PLAINFIELD, GA 31073	Certificate		10/6/1999	6/11/2001
		0.00	2/18/2000	
		0.00	9/7/1999	
Abraham, Pedro	Criminology BA	Attending	9/4/2000	(555)089-9362
9910AB0194	Day		10/14/1999	( ) -
pabraham@aollsslow.com	Sun-Sentinel		8/17/2001	
	Full Time	General Management		
1503 W. Taylor BROOKSVILLE, FL 34605	Bachelor		10/14/1999	6/11/2001
		0.00	10/14/1999	
		0.00	10/14/1999	
Ackerman, Ryan A	Personnel Management	Attending		(555) 089-3020
9902AC0053	Day	Able Baker	1/4/1999	
rackerman@aollsslow.com	Sun-Sentinel	High School	12/19/2003	
	Less Than Half Time	Business		
PO Box 209 FORT LAUDERDALE, FL 33338	Certificate		6/5/2006	
		0.00	1/4/1999	
		0.00	6/5/2006	
Ackerman, Ryan A	Credit Associate in Marketing Management	Attending	9/7/1999	(555) 089-3020
9902AC0076	Day	Able Baker	5/3/1999	
rackerman@aollsslow.com	Sun-Sentinel	High School	10/28/2003	
	Less Than Half Time	Business		
PO Box 209 FORT LAUDERDALE, FL 33338	Associate of Applied Science		9/7/1999	
		0.00	5/3/1999	
		0.00	6/5/2006	
Adair, Kim	Marketing Version Catalog	Attending	9/4/2000	(555)089-4759
0806AD0557	Day	Able Baker	9/5/2000	
kadair@aollsslow.com	Sun-Sentinel	Some College	2/29/2008	
	Full Time	General Management		
695 Manhattan Dr. #11 RUSSELLVILLE, AL 35653	Bachelor		6/25/2008	6/11/2001
		12.00	9/5/2000	

Master Student Listing Summary

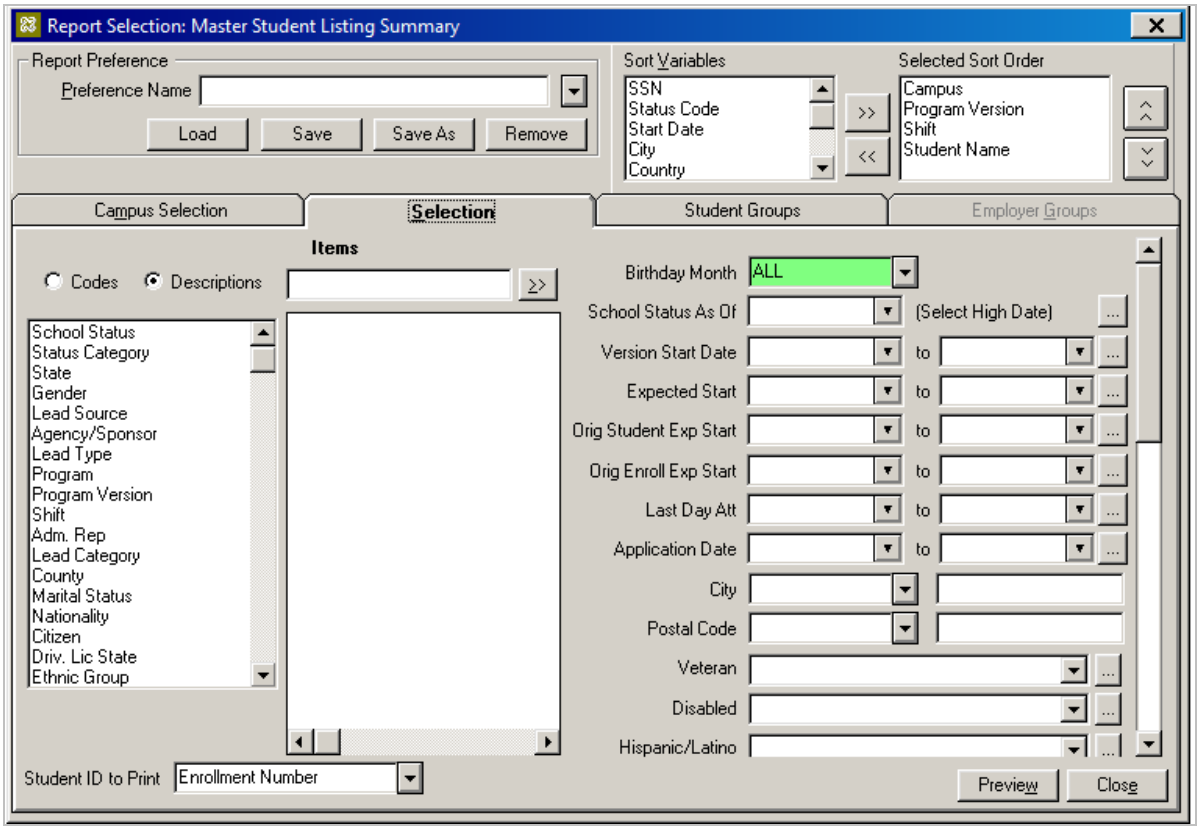
This is the summary version of the Master Student Listing Detail report. Students who have been enrolled but have not yet started classes can be listed on this report.

Note: Leads do not appear on Master Student Listing Summary report. For information about leads, use the Admissions > Lead Master Listing Detail report.

To run the report:

1. Navigate to **Reports > Academic Records > Master Student Listing Summary**. The Report Selection: Master Student Listing Summary form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Note: You can filter the data by one or multiple active or inactive program groups.



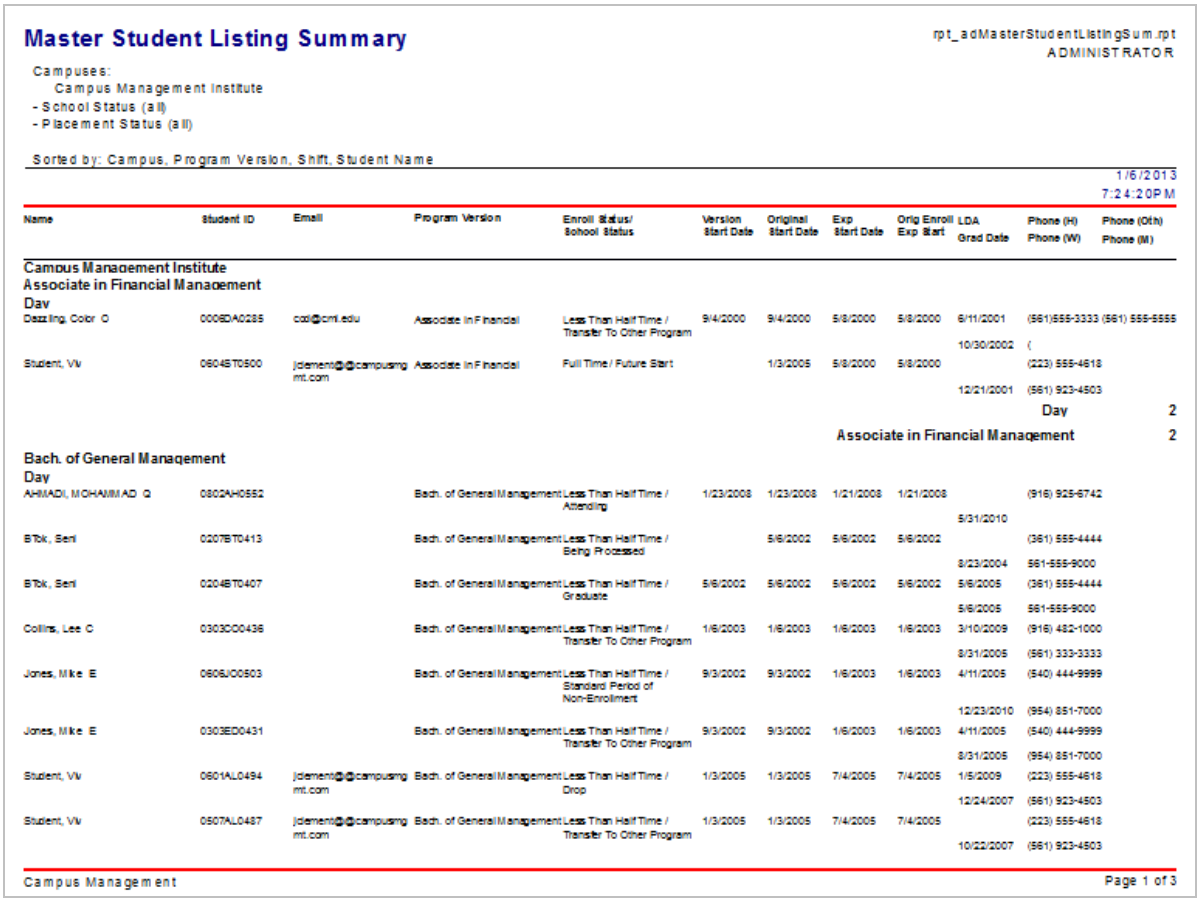
4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

- Name
- Student ID
- Email
- Program Version
- Enroll Status/School Status
- Version Start Date
- Original Start Date
- Expected Start Date
- Original Enrollment Expected Start
- Original Expected Start
- Last Date of Attendance (LDA)
- Graduation Date
- Phone (Home, Work, Other, Mobile)



Master Student Listing Summary

rpt_adMasterStudentListingSum.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- School Status (all)
- Placement Status (all)

Sorted by: Campus, Program Version, Shift, Student Name

1/6/2013
7:24:20PM

Name	Student ID	Email	Program Version	Enroll Status/ School Status	Version Start Date	Original Start Date	Exp Start Date	Orig Enroll Exp Start	LDA / Grad Date	Phone (H) / Phone (W)	Phone (Oth) / Phone (M)
Campus Management Institute											
Associate in Financial Management											
Day											
Dazzling, Color O	0006DA0235	cool@cmi.edu	Associate in Financial	Less Than Half Time / Transfer To Other Program	9/4/2000	9/4/2000	5/8/2000	5/8/2000	6/11/2001	(561)555-3333	(561) 555-5555
									10/30/2002	(	
Student, Vv	0604BT0500	jclement@@campusmgmt.com	Associate in Financial	Full Time / Future Start		1/3/2005	5/8/2000	5/8/2000		(223) 555-4618	
									12/21/2001	(561) 923-4503	
										Day	**2**
										Associate in Financial Management	**2**
Bach. of General Management											
Day											
AHMADI, MOHAMMAD Q	0802AH0552		Bach. of General Management	Less Than Half Time / Attending	1/23/2008	1/23/2008	1/21/2008	1/21/2008		(916) 925-6742	
									5/31/2010		
BTok, Seri	0207BT0413		Bach. of General Management	Less Than Half Time / Being Processed		5/6/2002	5/6/2002	5/6/2002		(361) 555-4444	
									8/23/2004	561-555-9000	
BTok, Seri	0204BT0407		Bach. of General Management	Less Than Half Time / Graduate	5/6/2002	5/6/2002	5/6/2002	5/6/2002	5/6/2005	(361) 555-4444	
									5/6/2005	561-555-9000	
Collins, Lee C	0303CO0436		Bach. of General Management	Less Than Half Time / Transfer To Other Program	1/6/2003	1/6/2003	1/6/2003	1/6/2003	3/10/2009	(916) 482-1000	
									8/31/2005	(561) 333-3333	
Jones, Mike E	0606JO0503		Bach. of General Management	Less Than Half Time / Standard Period of Non-Enrollment	9/3/2002	9/3/2002	1/6/2003	1/6/2003	4/11/2005	(540) 444-9999	
									12/23/2010	(954) 851-7000	
Jones, Mike E	0303ED0431		Bach. of General Management	Less Than Half Time / Transfer To Other Program	9/3/2002	9/3/2002	1/6/2003	1/6/2003	4/11/2005	(540) 444-9999	
									8/31/2005	(954) 851-7000	
Student, Vv	0601AL0494	jclement@@campusmgmt.com	Bach. of General Management	Less Than Half Time / Drop	1/3/2005	1/3/2005	7/4/2005	7/4/2005	1/5/2009	(223) 555-4618	
									12/24/2007	(561) 923-4503	
Student, Vv	0507AL0487	jclement@@campusmgmt.com	Bach. of General Management	Less Than Half Time / Transfer To Other Program	1/3/2005	1/3/2005	7/4/2005	7/4/2005		(223) 555-4618	
									10/22/2007	(561) 923-4503	

Campus Management

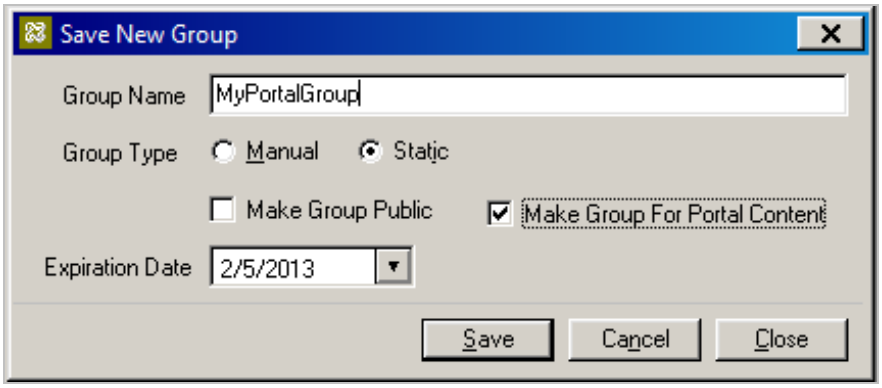
Page 1 of 3

To save student groups from this report for Portal, perform the following steps:

a. In the Report Viewer, select **Report > Save Student Group**.

b. In the Save New Group form, enter the **Group Name**, select the **Group Type**, and select **Make Group**

for Portal Content.



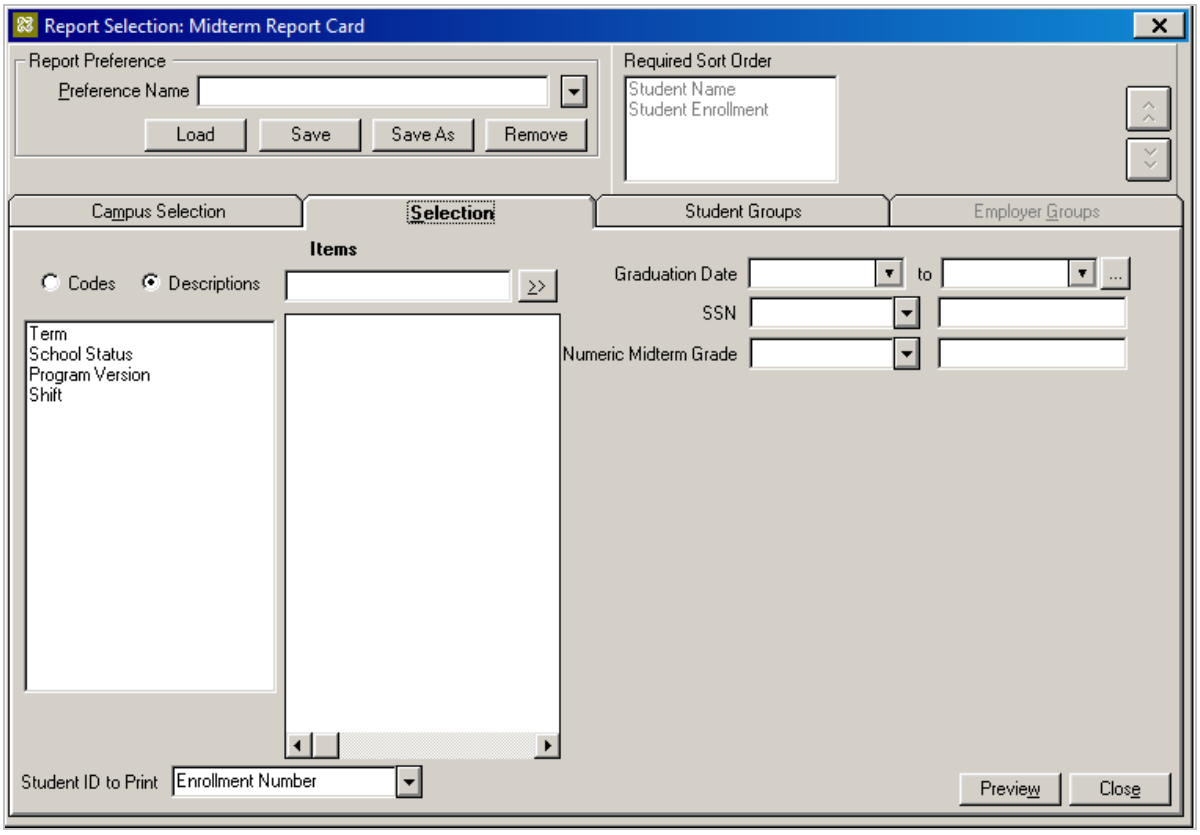
Midterm Report Card

This report prints Midterm Report Cards for one student or for all students if a lesson code of MIDTERM has been assigned to a course. The Midterm Report Card models the Report Cards report.

Note: The Midterm Report Card also displays the independent posted midterm grade if it is available on the student record.

To run the report:

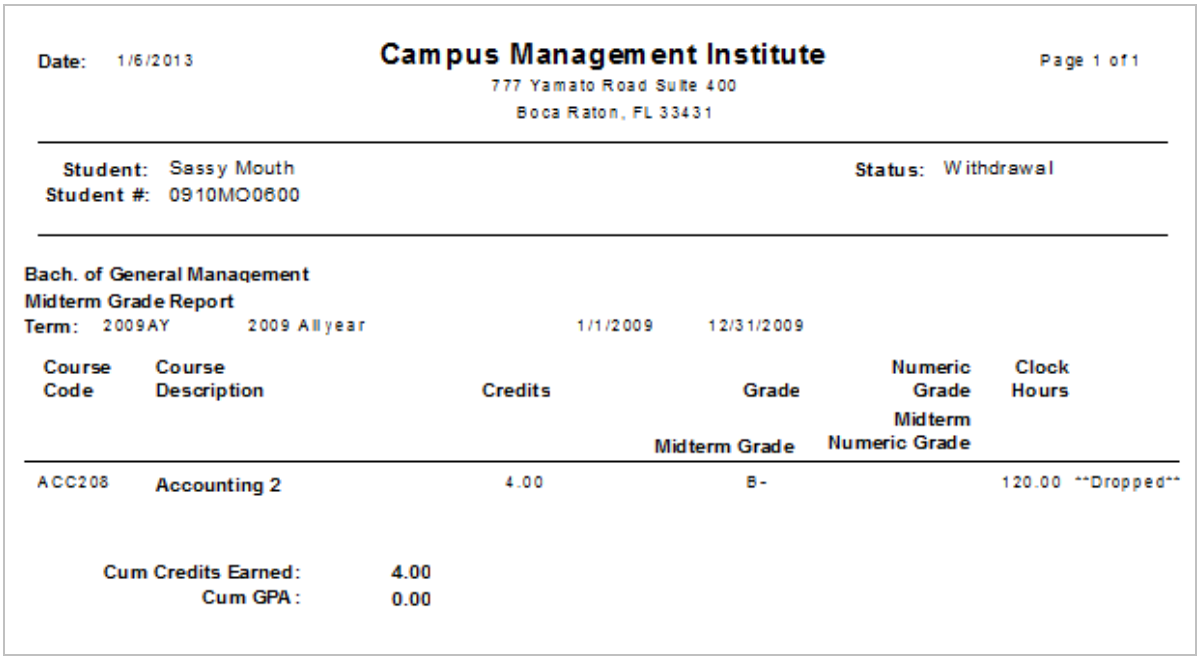
1. Navigate to **Reports > Academic Records > Midterm Report Card**. The Report Selection: Midterm Report Card form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.



Date: 1/6/2013

Campus Management Institute
777 Yamato Road Suite 400
Boca Raton, FL 33431

Page 1 of 1

Student: Sassy Mouth
Student #: 0910MO0600

Status: Withdrawal

Bach. of General Management
Midterm Grade Report
Term: 2009AY 2009 All year 1/1/2009 12/31/2009

Course Code	Course Description	Credits	Grade / Midterm Grade	Numeric Grade / Midterm Numeric Grade	Clock Hours	
ACC208	Accounting 2	4.00	B-		120.00	**Dropped**

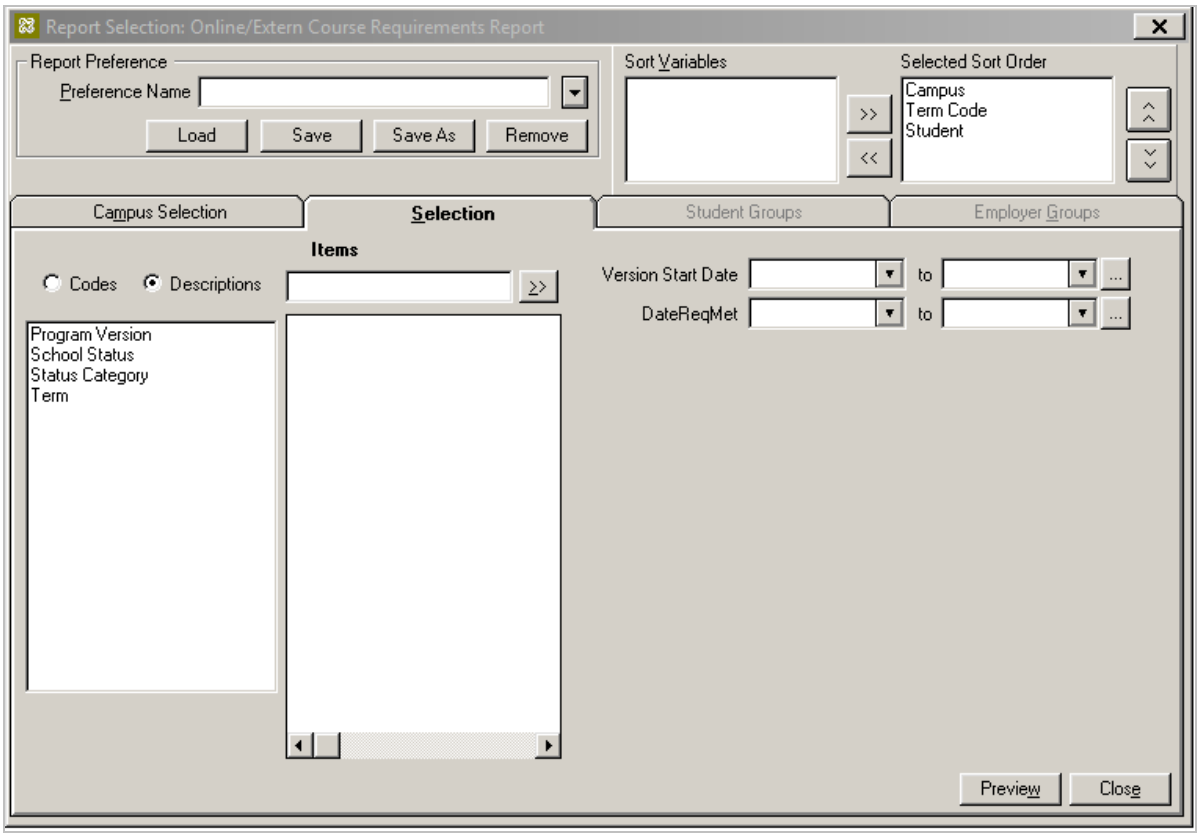
Cum Credits Earned: 4.00
Cum GPA: 0.00

Online/Extern Course Requirements

This report is used to display the extern hours and online course hours that are posted against a course on a student's class schedule.

To run the report:

1. Navigate to **Reports > Academic Records > Online/Extern Course Requirements**. The Report Selection: Online/Extern Course Requirements form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

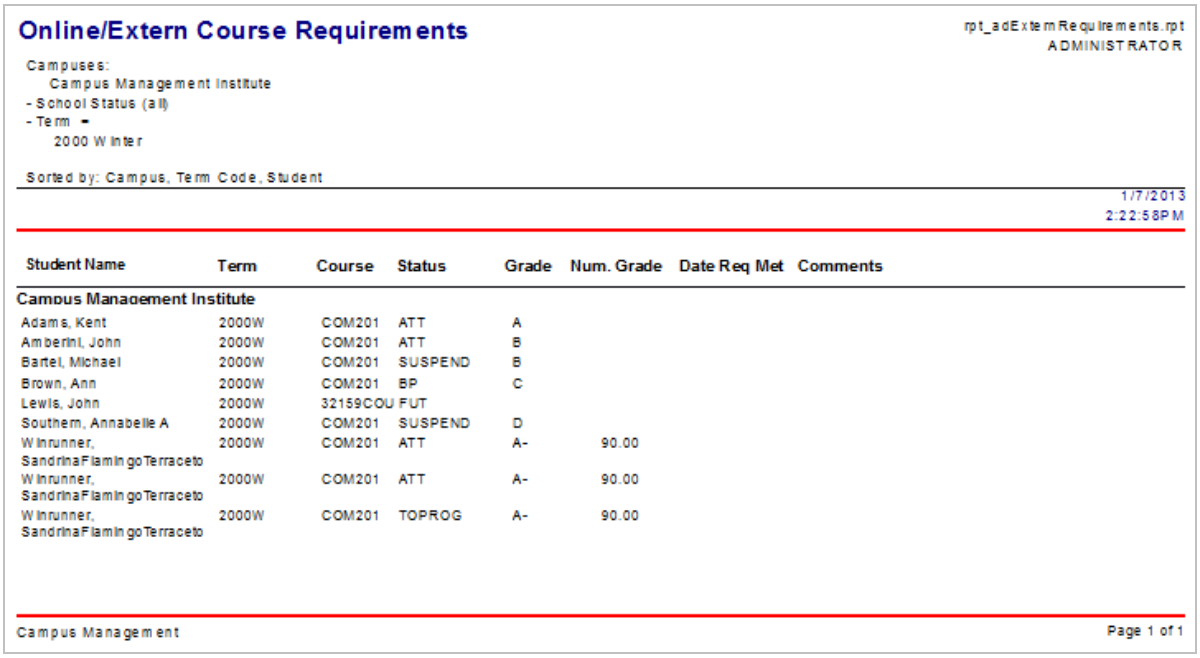


4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Term
   - Course Code
   - Status
   - Grade
   - Numeric Grade
   - Date Requirement Met

- Comments



Online/Extern Course Requirements

rpt_adExternRequirements.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- School Status (all)
- Term =
2000 Winter

Sorted by: Campus, Term Code, Student

1/7/2013
2:22:58PM

Student Name	Term	Course	Status	Grade	Num. Grade	Date Req Met	Comments
Campus Management Institute							
Adams, Kent	2000W	COM201	ATT	A			
Amberini, John	2000W	COM201	ATT	B			
Bartel, Michael	2000W	COM201	SUSPEND	B			
Brown, Ann	2000W	COM201	BP	C			
Lewis, John	2000W	32159COU	FUT				
Southern, Annabelle A	2000W	COM201	SUSPEND	D			
Winrunner, SandrinaFlamingoTerraceto	2000W	COM201	ATT	A-	90.00		
Winrunner, SandrinaFlamingoTerraceto	2000W	COM201	ATT	A-	90.00		
Winrunner, SandrinaFlamingoTerraceto	2000W	COM201	TOPROG	A-	90.00		

Campus Management

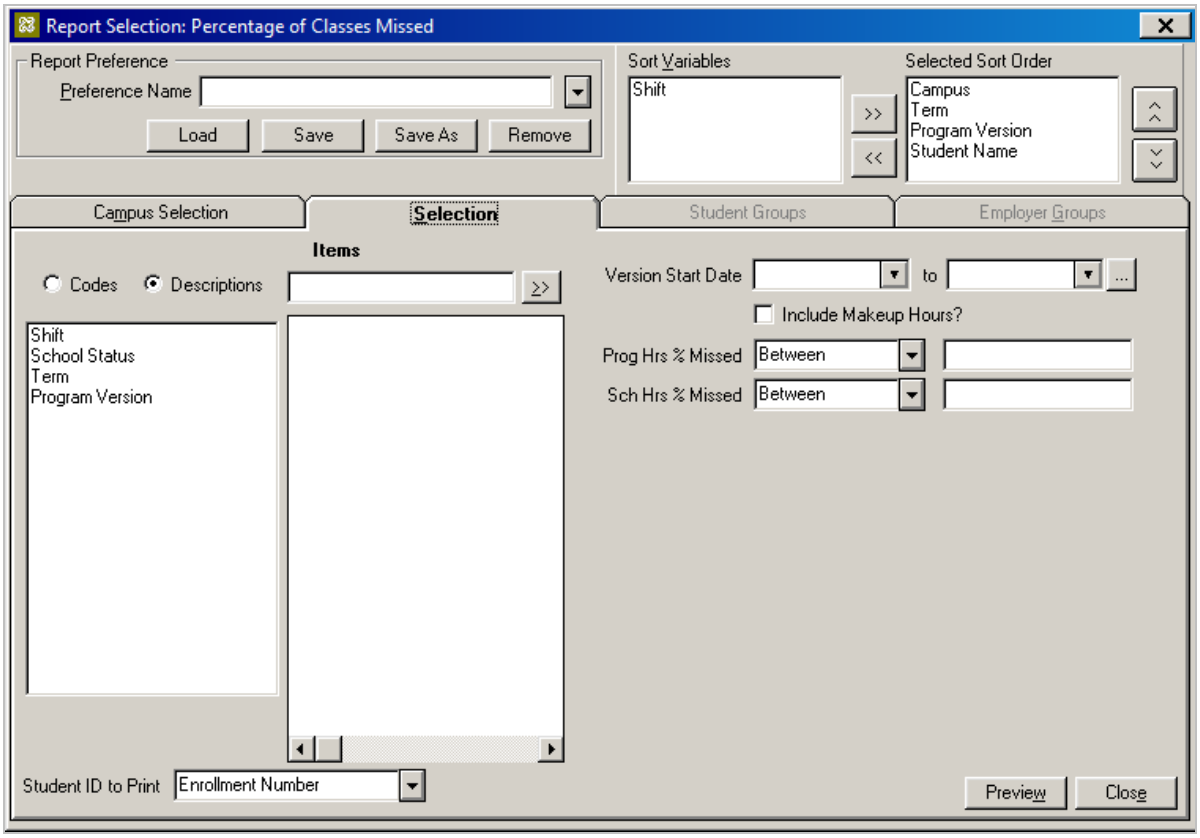
Page 1 of 1

Percentage of Classes Missed

This report lists the percentage of classes missed by a student. This report can be used in a variety of ways. Many states and accrediting bodies have regulations that require a student be dropped from school if the student is absent a certain percentage of the scheduled class time or a certain percentage of the total program hours.

To run the report:

1. Navigate to **Reports > Academic Records > Percentage of Classes Missed**. The Report Selection: Percentage of Classes Missed form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

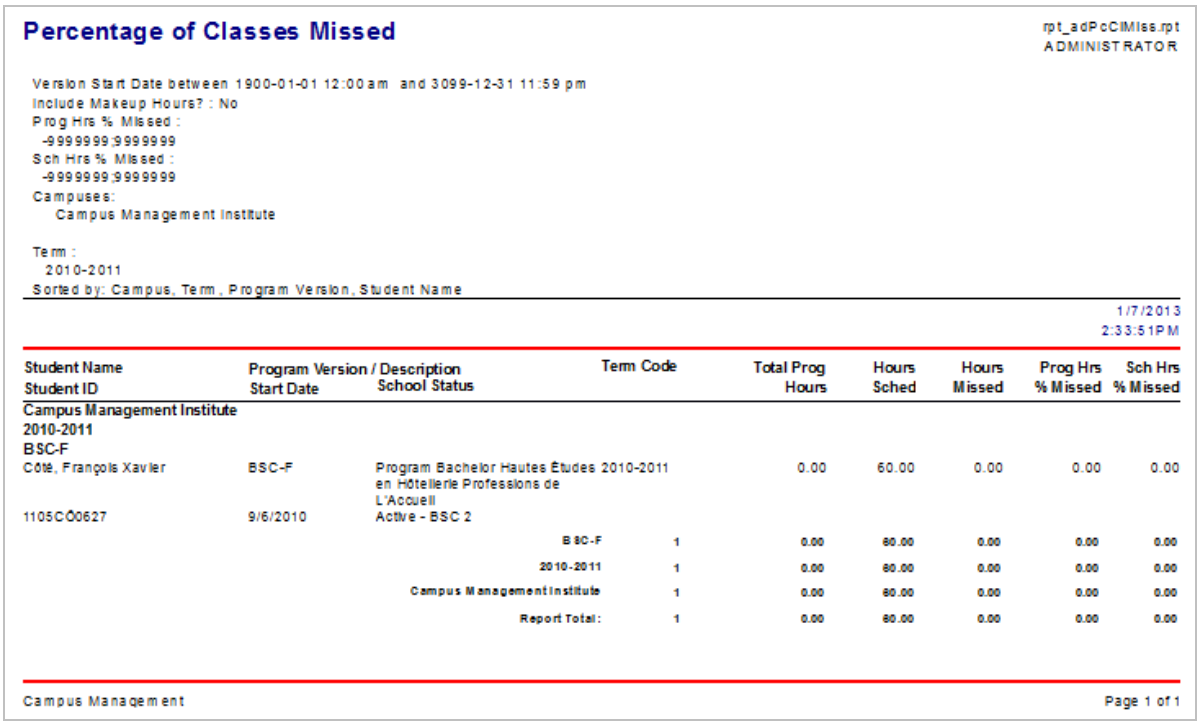


4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Student ID
   - Program Version
   - Start Date
   - Program Description
   - School Status
   - Term Code
   - Total Program Hours

- Hours Scheduled
- Hours Missed
- Percentage Program Hours Missed
- Percentage Scheduled Hours Missed



Percentage of Classes Missed

rpt_adPcClMiss.rpt
ADMINISTRATOR

Version Start Date between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Include Makeup Hours? : No
Prog Hrs % Missed :
-9999999;9999999
Sch Hrs % Missed :
-9999999;9999999
Campuses:
Campus Management Institute

Term :
2010-2011
Sorted by: Campus, Term, Program Version, Student Name

1/7/2013
2:33:51 PM

Student Name / Student ID	Program Version / Description / Start Date / School Status	Term Code	Total Prog Hours	Hours Sched	Hours Missed	Prog Hrs % Missed	Sch Hrs % Missed
Campus Management Institute							
2010-2011							
BSC-F							
Côté, François Xavier	BSC-F		0.00	60.00	0.00	0.00	0.00
1105CÔ0627	Program Bachelor Hautes Études en Hôtellerie Professions de L'Accueil 2010-2011 9/6/2010 Active - BSC 2						
	BSC-F	1	0.00	60.00	0.00	0.00	0.00
	2010-2011	1	0.00	60.00	0.00	0.00	0.00
	Campus Management Institute	1	0.00	60.00	0.00	0.00	0.00
	Report Total:	1	0.00	60.00	0.00	0.00	0.00

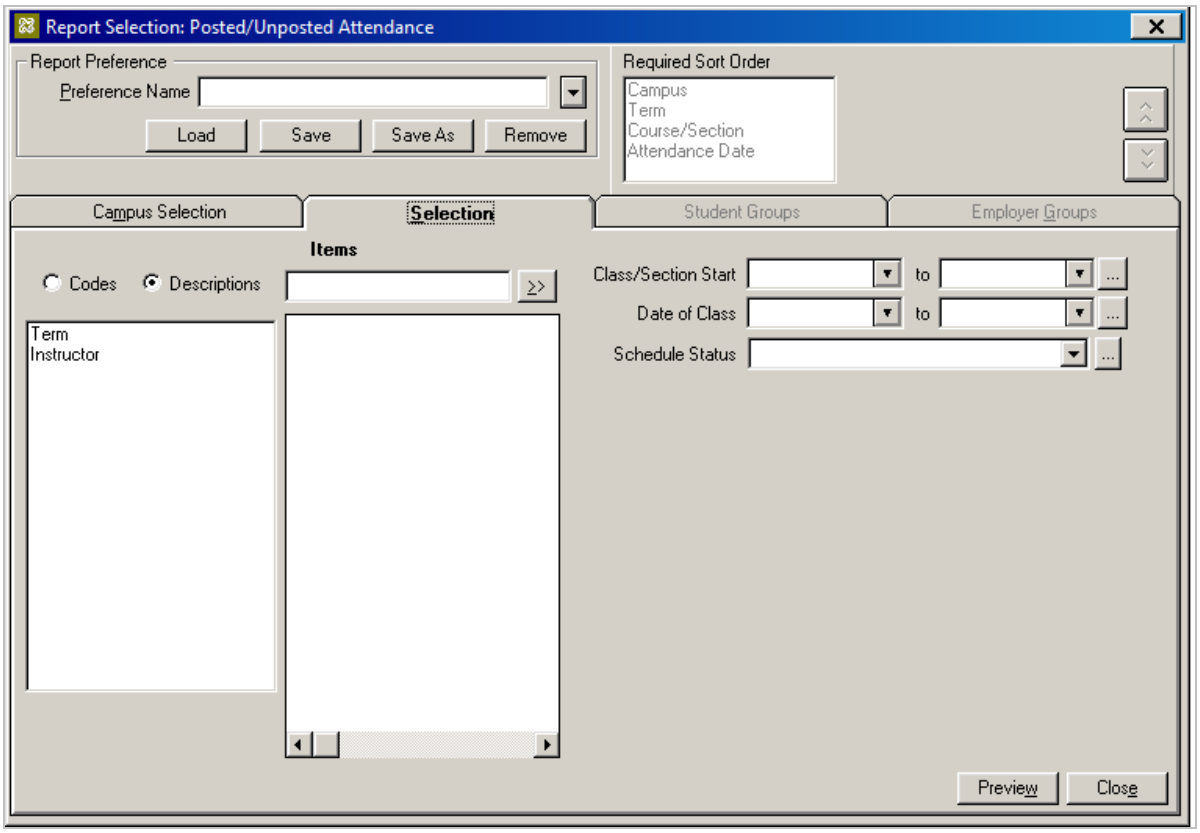
Campus Management
Page 1 of 1

Posted/Unposted Attendance

This report is used primarily to identify missing (unposted) attendance up to a given date. It can also be used in the reverse context, i.e., to list attendance that has been posted through a given date.

To run the report:

1. Navigate to **Reports > Academic Records > Posted/Unposted Attendance**. The Report Selection: Posted/Unposted Attendance form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

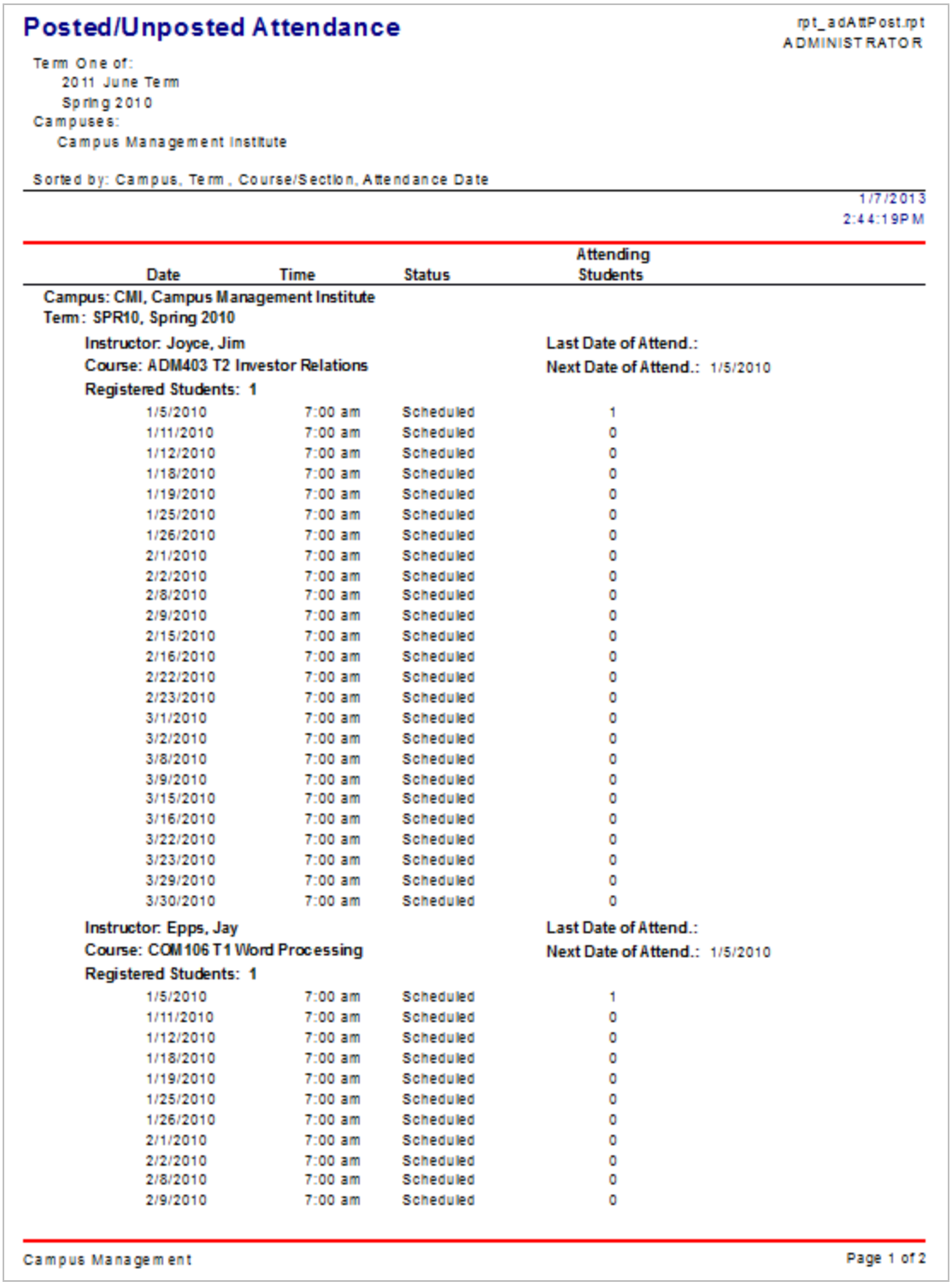


4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Campus
   - Term
   - Instructor
   - Course (class section)
   - Last Date of Attendance
   - Next Date of Attendance
   - Registered Students (number of)
   - Attendance Date and Time

- Status
- Attending Students (number of)



Posted/Unposted Attendance

rpt_adAttPost.rpt
ADMINISTRATOR

Term One of:
2011 June Term
Spring 2010
Campuses:
Campus Management Institute

Sorted by: Campus, Term, Course/Section, Attendance Date

1/7/2013
2:44:19PM

Date	Time	Status	Attending Students
Campus: CMI, Campus Management Institute			
Term: SPR10, Spring 2010			
Instructor: Joyce, Jim			**Last Date of Attend.:**
Course: ADM403 T2 Investor Relations			**Next Date of Attend.:** 1/5/2010
Registered Students: 1			
1/5/2010	7:00 am	Scheduled	1
1/11/2010	7:00 am	Scheduled	0
1/12/2010	7:00 am	Scheduled	0
1/18/2010	7:00 am	Scheduled	0
1/19/2010	7:00 am	Scheduled	0
1/25/2010	7:00 am	Scheduled	0
1/26/2010	7:00 am	Scheduled	0
2/1/2010	7:00 am	Scheduled	0
2/2/2010	7:00 am	Scheduled	0
2/8/2010	7:00 am	Scheduled	0
2/9/2010	7:00 am	Scheduled	0
2/15/2010	7:00 am	Scheduled	0
2/16/2010	7:00 am	Scheduled	0
2/22/2010	7:00 am	Scheduled	0
2/23/2010	7:00 am	Scheduled	0
3/1/2010	7:00 am	Scheduled	0
3/2/2010	7:00 am	Scheduled	0
3/8/2010	7:00 am	Scheduled	0
3/9/2010	7:00 am	Scheduled	0
3/15/2010	7:00 am	Scheduled	0
3/16/2010	7:00 am	Scheduled	0
3/22/2010	7:00 am	Scheduled	0
3/23/2010	7:00 am	Scheduled	0
3/29/2010	7:00 am	Scheduled	0
3/30/2010	7:00 am	Scheduled	0
Instructor: Epps, Jay			**Last Date of Attend.:**
Course: COM106 T1 Word Processing			**Next Date of Attend.:** 1/5/2010
Registered Students: 1			
1/5/2010	7:00 am	Scheduled	1
1/11/2010	7:00 am	Scheduled	0
1/12/2010	7:00 am	Scheduled	0
1/18/2010	7:00 am	Scheduled	0
1/19/2010	7:00 am	Scheduled	0
1/25/2010	7:00 am	Scheduled	0
1/26/2010	7:00 am	Scheduled	0
2/1/2010	7:00 am	Scheduled	0
2/2/2010	7:00 am	Scheduled	0
2/8/2010	7:00 am	Scheduled	0
2/9/2010	7:00 am	Scheduled	0

Campus Management

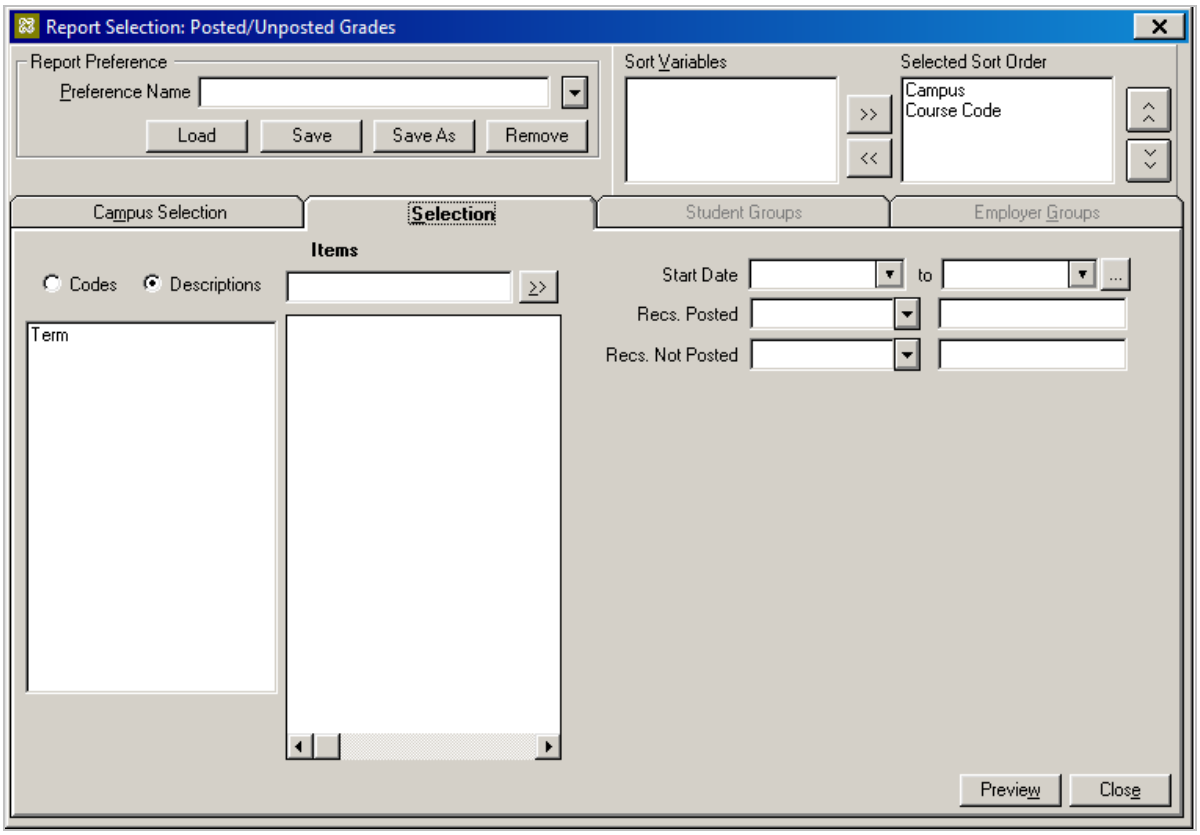
Page 1 of 2

Posted/Unposted Grades

This report displays the number of grades posted and not posted for class sections. It can be used to identify class sections and instructors whose grades are incomplete for a given term.

To run the report:

1. Navigate to **Reports > Academic Records > Posted/Unposted Grades**. The Report Selection: Posted/Unposted Grades form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

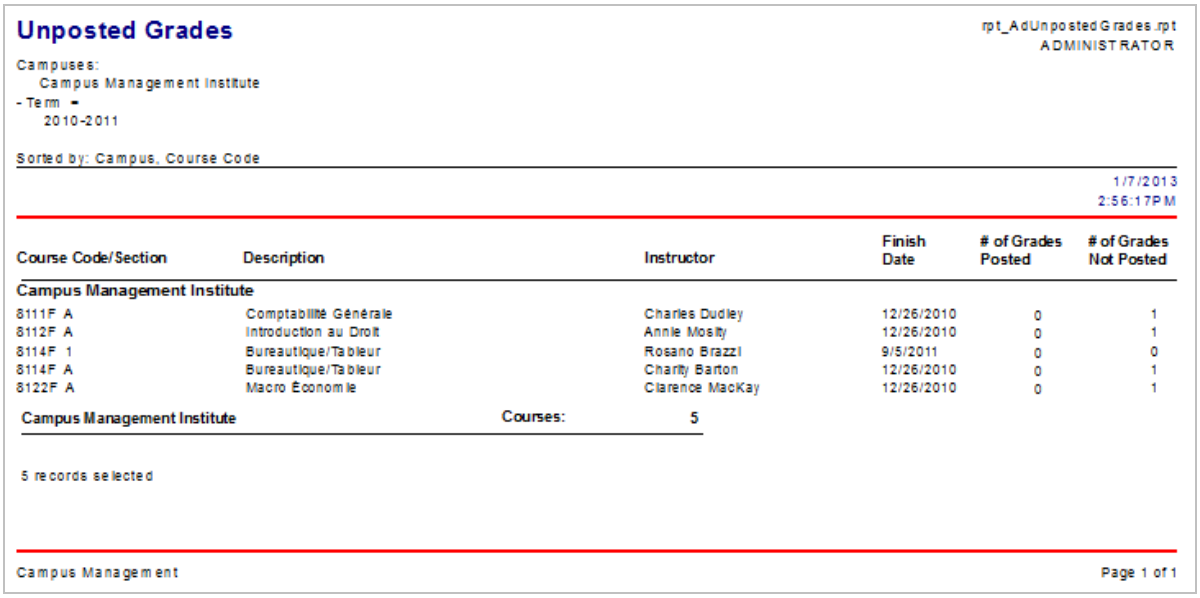


4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Course Code/Section
   - Course Description
   - Instructor
   - Course Finish Date
   - Number of Grades Posted

- Number of Grades Not Posted



Unposted Grades

rpt_AdUnpostedGrades.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- Term -
2010-2011

Sorted by: Campus, Course Code

1/7/2013
2:56:17PM

Course Code/Section	Description	Instructor	Finish Date	# of Grades Posted	# of Grades Not Posted
Campus Management Institute					
8111F A	Comptabilité Générale	Charles Dudley	12/26/2010	0	1
8112F A	Introduction au Droit	Annie Mosity	12/26/2010	0	1
8114F 1	Bureautique/Tableur	Rosano Brazzi	9/5/2011	0	0
8114F A	Bureautique/Tableur	Charity Barton	12/26/2010	0	1
8122F A	Macro Économie	Clarence MacKay	12/26/2010	0	1
Campus Management Institute		**Courses:**	**5**		

5 records selected

Campus Management

Page 1 of 1

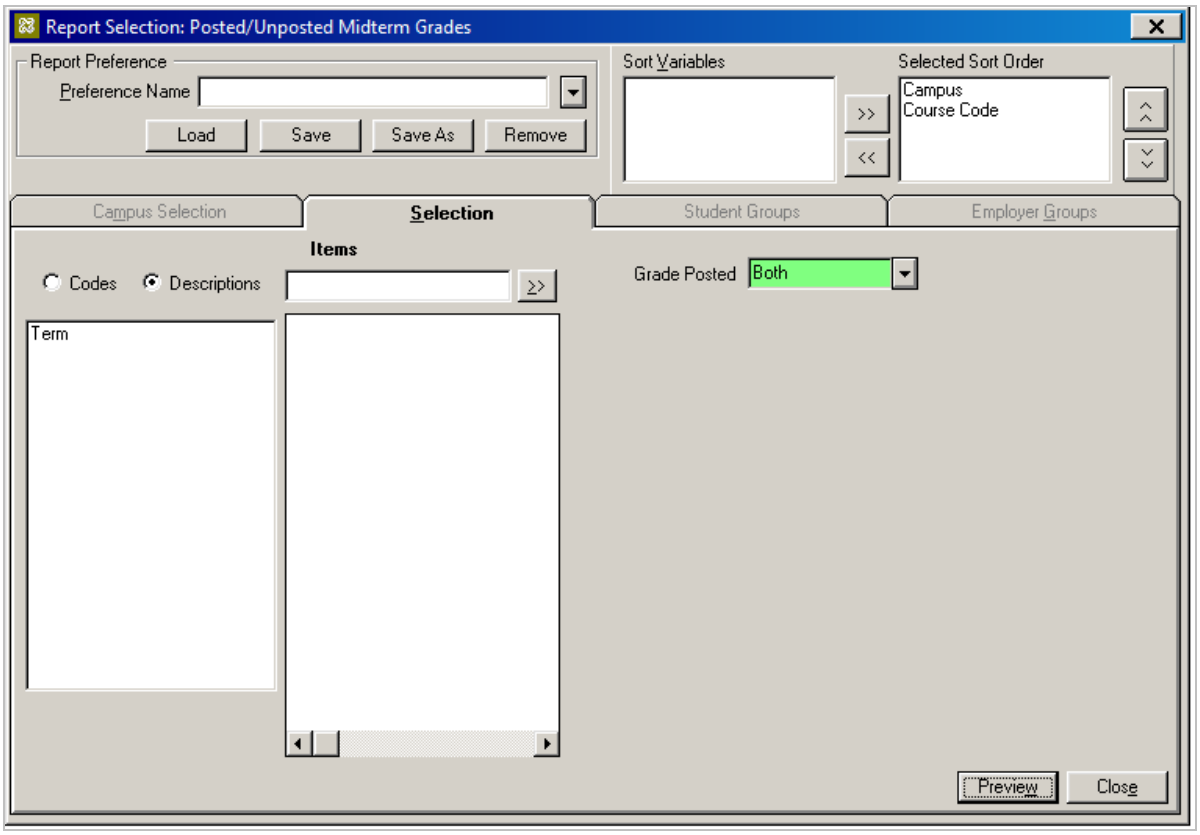
Posted/Unposted Midterm Grades

This report displays the number of midterm grades posted and not posted for class sections. It can be used to identify class sections and instructors whose midterm grades are incomplete for a given term.

To run the report:

1. Navigate to **Reports > Academic Records > Posted/Unposted Midterm Grades**. The Report Selection: Posted/Unposted Midterm Grades form is displayed.
2. Select appropriate options on the Selection tab.

   Note: The 'Grade Posted' options allows you to select **Yes** for grades posted, **No** for grades not posted, and **Both** for posted and not posted grades.

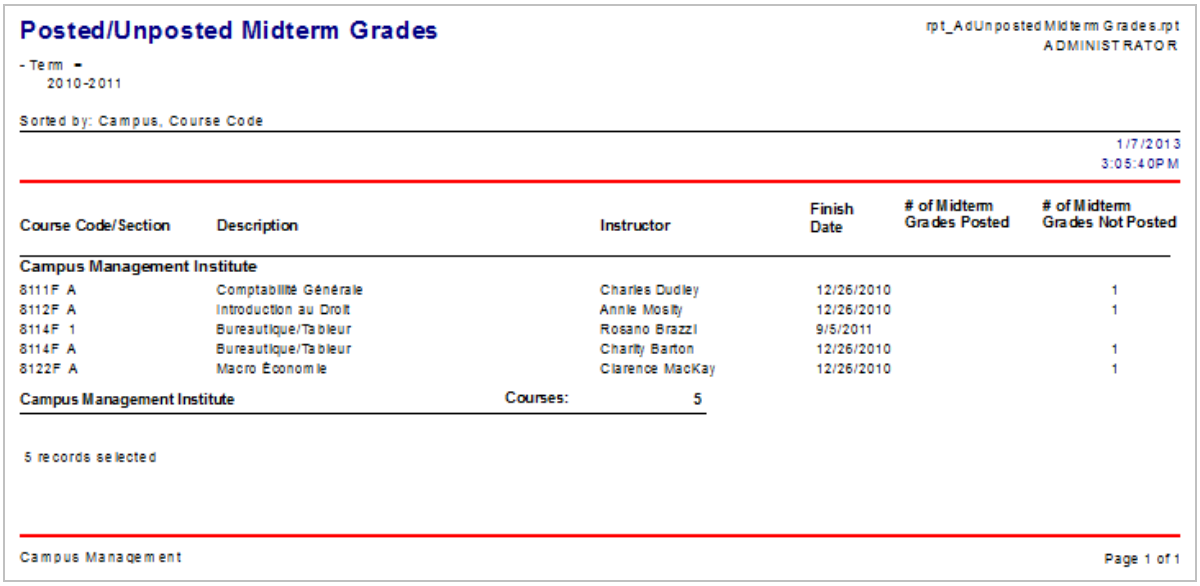


3. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Course Code/Section
   - Course Description
   - Instructor
   - Course Finish Date
   - Number of Midterm Grades Posted

- Number of Midterm Grades Not Posted



Posted/Unposted Midterm Grades

rpt_AdUnposted Midterm Grades.rpt
ADMINISTRATOR

- Term -
2010-2011

Sorted by: Campus, Course Code

1/7/2013
3:05:40 PM

Course Code/Section	Description	Instructor	Finish Date	# of Midterm Grades Posted	# of Midterm Grades Not Posted
Campus Management Institute					
8111F A	Comptabilité Générale	Charles Dudley	12/26/2010		1
8112F A	Introduction au Droit	Annie Mosity	12/26/2010		1
8114F 1	Bureautique/Tableur	Rosano Brazzi	9/5/2011		
8114F A	Bureautique/Tableur	Charity Barton	12/26/2010		1
8122F A	Macro Économie	Clarence MacKay	12/26/2010		1
Campus Management Institute		**Courses:**	5		

5 records selected

Campus Management

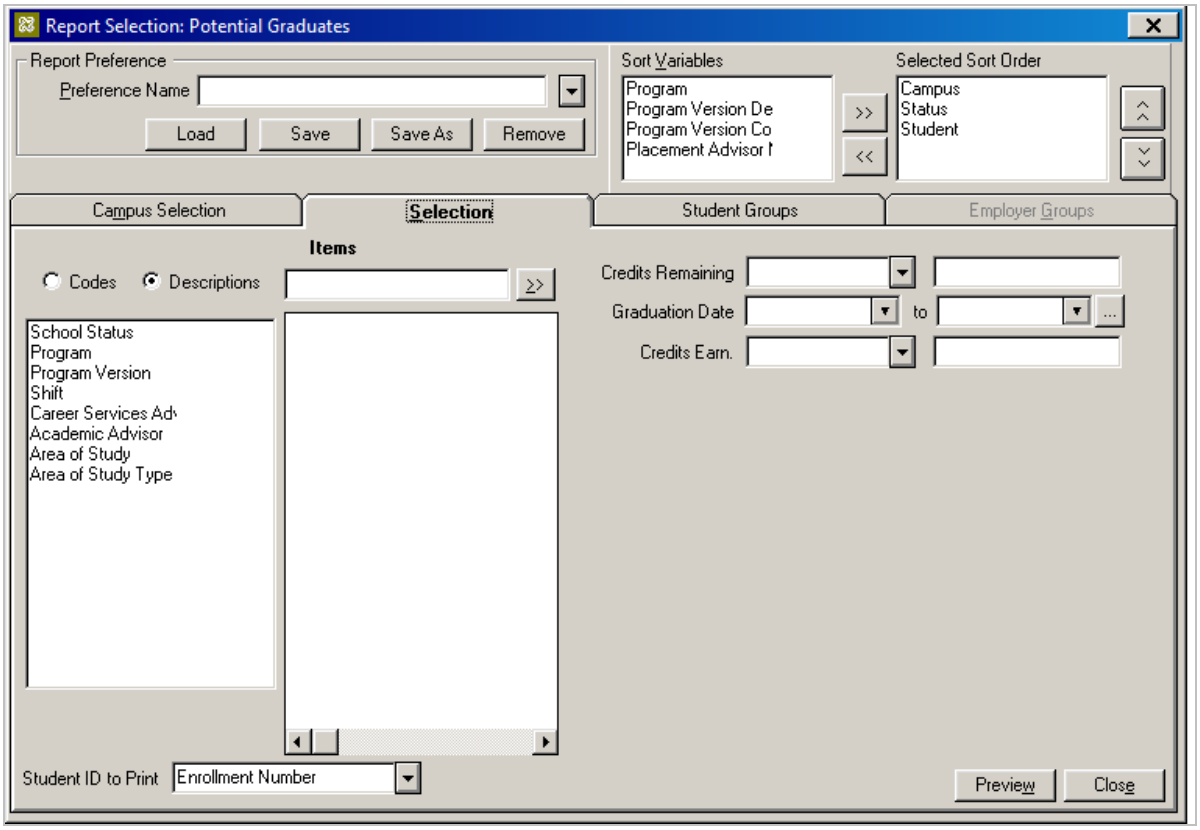
Page 1 of 1

Potential Graduates

This report lists potential graduations based on the selection criteria.

To run the report:

1. Navigate to **Reports > Academic Records > Potential Graduates**. The Report Selection: Potential Graduates form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

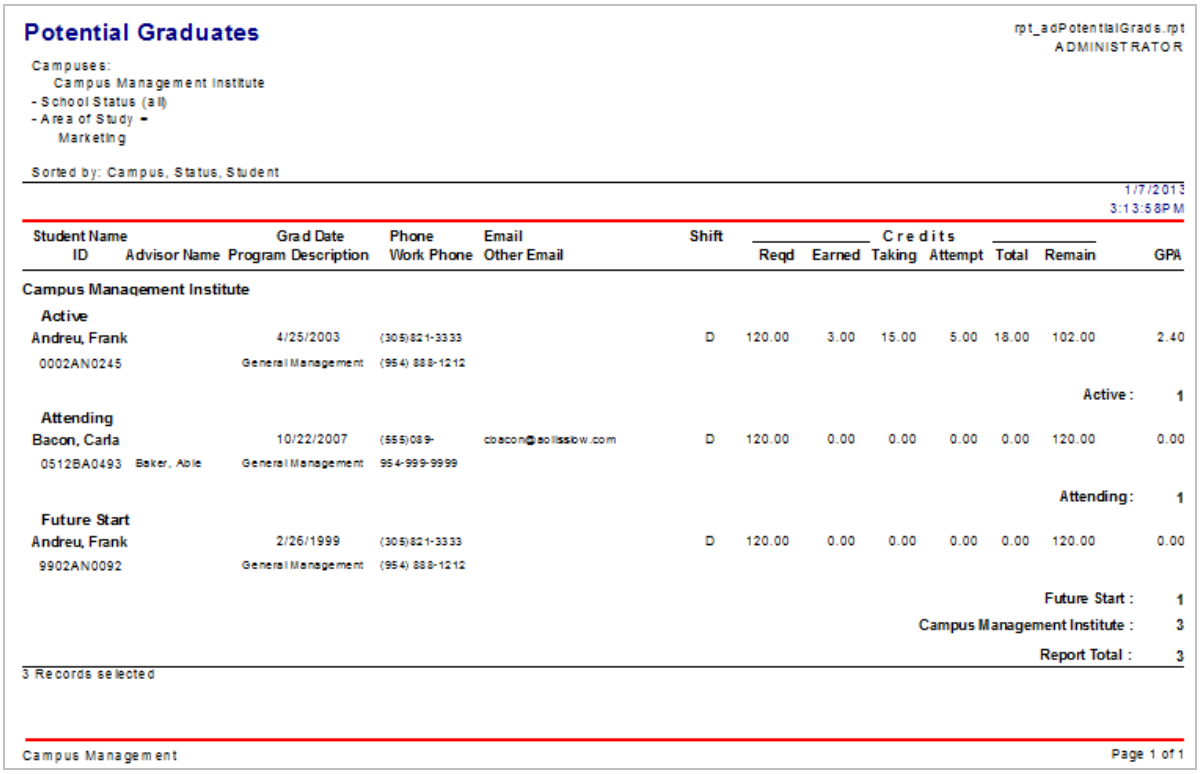
   Details are listed for each student enrollment include:

   - Student Name
   - Student ID
   - Advisor Name
   - Program Description
   - Graduation Date
   - Phone and Work Phone

- Email address and Other email address
- Shift
- Credits: Required, Earned, Taking, Attempted, Total (taking and attempted), Remaining
- GPA

Note: The 'Credits Taking' calculation includes only 'Current' courses and not 'Scheduled' courses.

Totals include a count of students in each group and the grand total of students listed.



Potential Graduates

rpt_adPotentialGrads.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- School Status (all)
- Area of Study -
Marketing

Sorted by: Campus, Status, Student

1/7/2013
3:13:58PM

Student Name / ID / Advisor Name	Grad Date / Program Description	Phone / Work Phone	Email / Other Email	Shift	Credits Reqd	Earned	Taking	Attempt	Total	Remain	GPA
Campus Management Institute											
Active											
Andreu, Frank	4/25/2003	(305)821-3333		D	120.00	3.00	15.00	5.00	18.00	102.00	2.40
0002AN0245	General Management	(954) 888-1212									
										Active :	**1**
Attending											
Bacon, Carla	10/22/2007	(555)089-	cbacon@collssiow.com	D	120.00	0.00	0.00	0.00	0.00	120.00	0.00
0512BA0493 Baker, Able	General Management	954-999-9999									
										Attending:	**1**
Future Start											
Andreu, Frank	2/26/1999	(305)821-3333		D	120.00	0.00	0.00	0.00	0.00	120.00	0.00
9902AN0092	General Management	(954) 888-1212									
										Future Start :	**1**
										Campus Management Institute :	**3**
										Report Total :	**3**

3 Records selected

Campus Management
Page 1 of 1

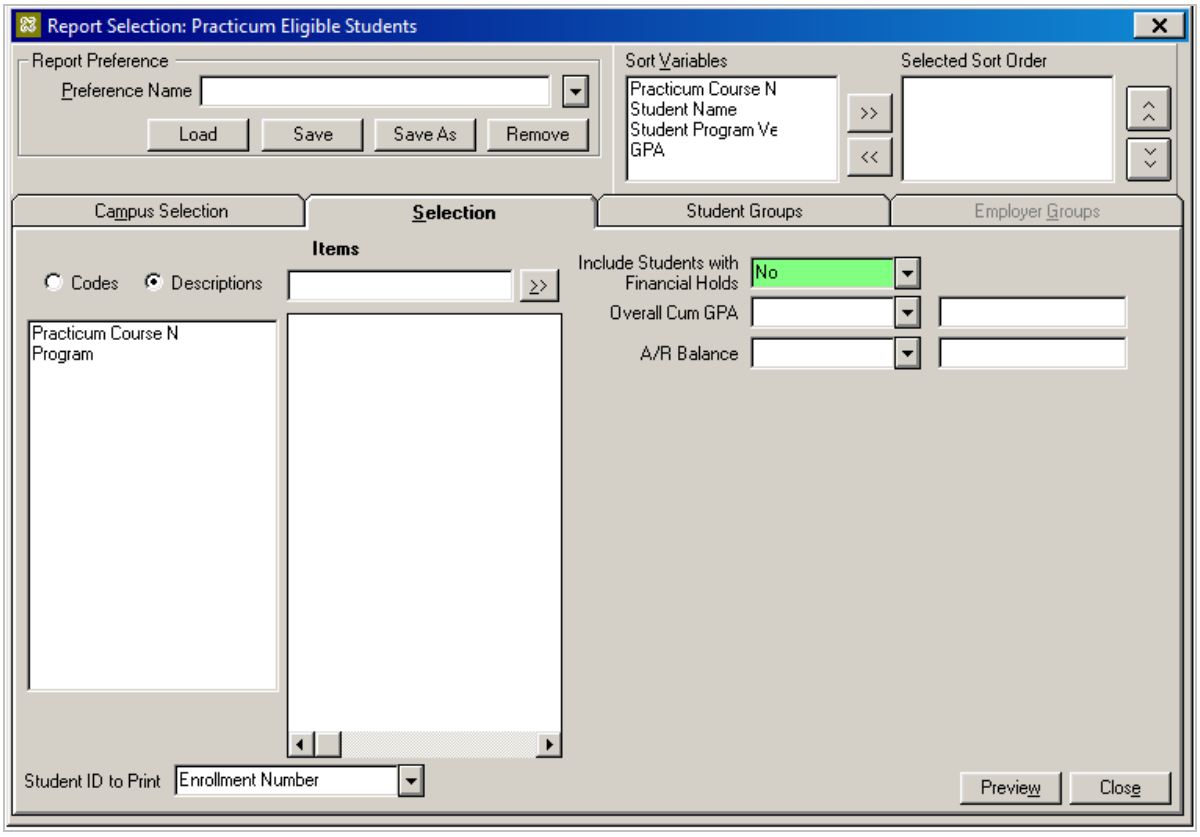
Practicum Eligible Students

This report lists students who have completed all prerequisite courses and who have met the GPA requirement to be eligible for a practicum.

To run the report:

1. Navigate to **Reports > Academic Records > Practicum Eligible Students**. The Report Selection: Practicum Eligible Students form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   You can select whether students with financial holds should be included or not included in the report. You can also select an threshold for the GPA and the outstanding student balance.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   Details listed for each student include:

   - Student Name
   - Student ID

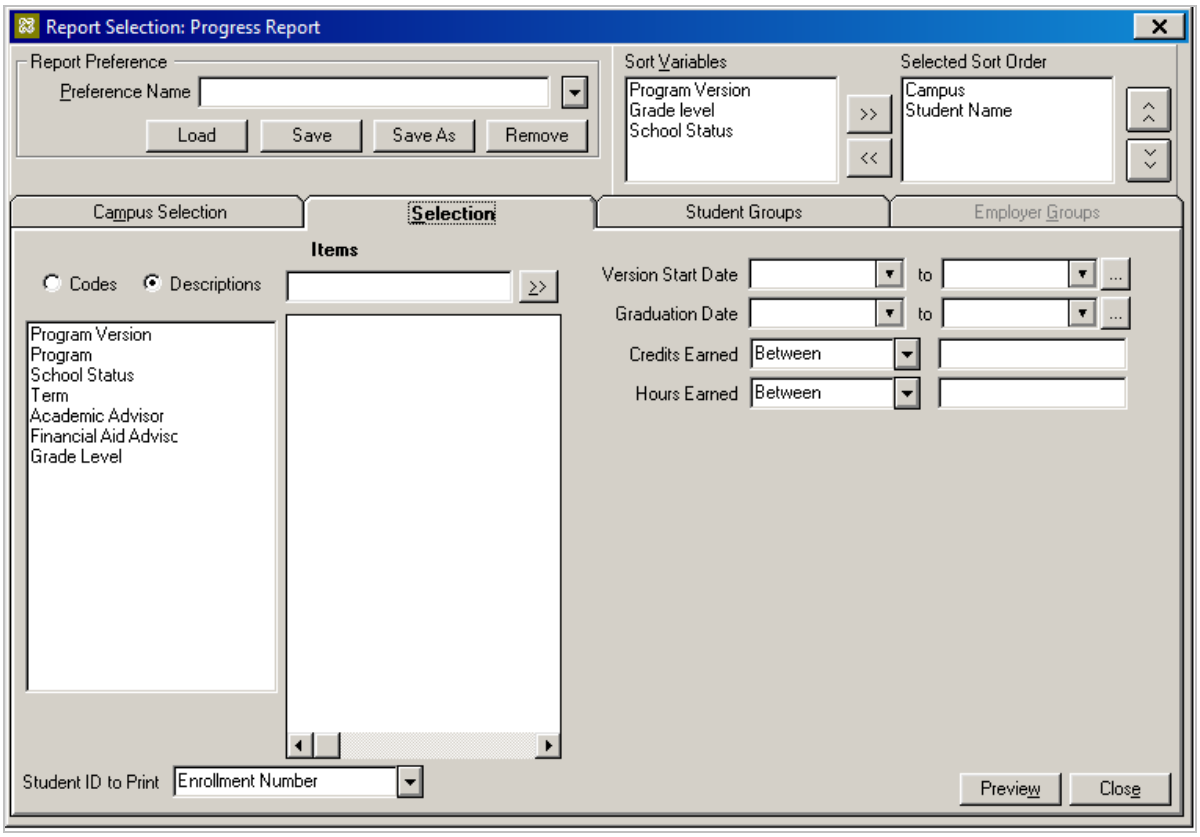
- Practicum course name
- GPA

Progress Report

This report allows users to view the progress of more than one student at a time. The report displays Financial Aid Eligibility and Academic Record information for students. See Access Security for Reports for authorization setup information.

To run the report:

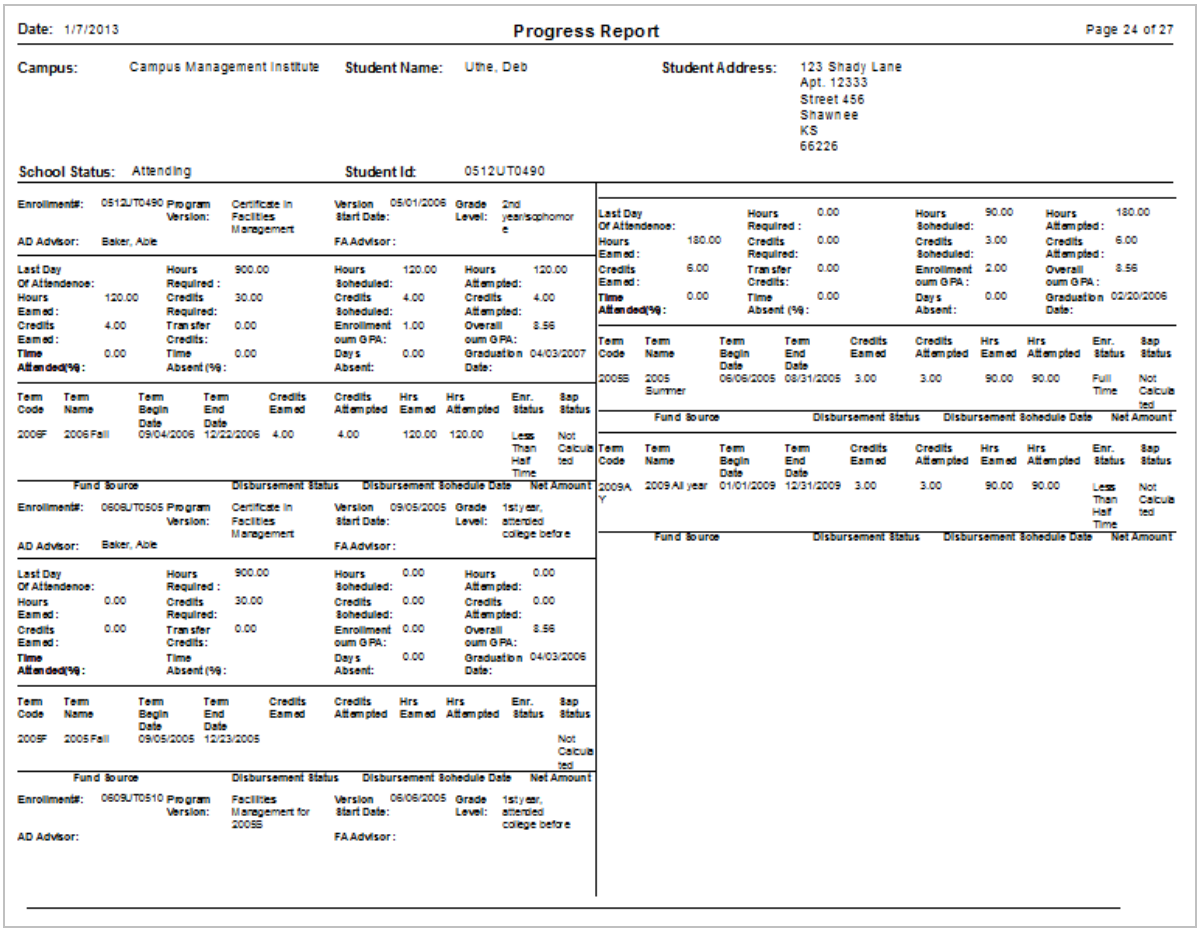
1. Navigate to **Reports > Academic Records > Progress Report**. The Report Selection: Progress Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.



Date: 1/7/2013

Progress Report

Page 24 of 27

Campus: Campus Management Institute **Student Name:** Uthe, Deb **Student Address:** 123 Shady Lane
Apt. 12333
Street 456
Shawnee
KS
66226

School Status: Attending **Student Id:** 0512UT0490

Enrollment#: 0512UT0490 **Program Version:** Certificate in Facilities Management **Version Start Date:** 05/01/2006 **Grade Level:** 2nd year/sophomore

AD Advisor: Baker, Able **FA Advisor:**

Last Day Of Attendence:		Hours Required :	900.00	Hours Scheduled:	120.00	Hours Attempted:	120.00
Hours Earned:	120.00	Credits Required:	30.00	Credits Scheduled:	4.00	Credits Attempted:	4.00
Credits Earned:	4.00	Transfer Credits:	0.00	Enrollment oum GPA:	1.00	Overall oum GPA:	8.56
Time Attended(%):	0.00	Time Absent (%):	0.00	Days Absent:	0.00	Graduation Date:	04/03/2007

Term Code	Term Name	Term Begin Date	Term End Date	Credits Earned	Credits Attempted	Hrs Earned	Hrs Attempted	Enr. Status	Sap Status
2006F	2006 Fall	09/04/2006	12/22/2006	4.00	4.00	120.00	120.00	Less Than Half Time	Not Calculated

Fund Source	Disbursement Status	Disbursement Schedule Date	Net Amount

Enrollment#: 0606UT0505 **Program Version:** Certificate in Facilities Management **Version Start Date:** 09/05/2005 **Grade Level:** 1st year, attended college before

AD Advisor: Baker, Able **FA Advisor:**

Last Day Of Attendence:		Hours Required :	900.00	Hours Scheduled:	0.00	Hours Attempted:	0.00
Hours Earned:	0.00	Credits Required:	30.00	Credits Scheduled:	0.00	Credits Attempted:	0.00
Credits Earned:	0.00	Transfer Credits:	0.00	Enrollment oum GPA:	0.00	Overall oum GPA:	8.56
Time Attended(%):		Time Absent (%):		Days Absent:	0.00	Graduation Date:	04/03/2006

Term Code	Term Name	Term Begin Date	Term End Date	Credits Earned	Credits Attempted	Hrs Earned	Hrs Attempted	Enr. Status	Sap Status
2005F	2005 Fall	09/05/2005	12/23/2005						Not Calculated

Fund Source	Disbursement Status	Disbursement Schedule Date	Net Amount

Enrollment#: 0609UT0510 **Program Version:** Facilities Management for 2006B **Version Start Date:** 06/06/2005 **Grade Level:** 1st year, attended college before

AD Advisor: **FA Advisor:**

Last Day Of Attendence:		Hours Required :	0.00	Hours Scheduled:	90.00	Hours Attempted:	180.00
Hours Earned:	180.00	Credits Required:	0.00	Credits Scheduled:	3.00	Credits Attempted:	6.00
Credits Earned:	6.00	Transfer Credits:	0.00	Enrollment oum GPA:	2.00	Overall oum GPA:	8.56
Time Attended(%):	0.00	Time Absent (%):	0.00	Days Absent:	0.00	Graduation Date:	02/20/2006

Term Code	Term Name	Term Begin Date	Term End Date	Credits Earned	Credits Attempted	Hrs Earned	Hrs Attempted	Enr. Status	Sap Status
2006S	2006 Summer	06/06/2005	08/31/2005	3.00	3.00	90.00	90.00	Full Time	Not Calculated

Fund Source	Disbursement Status	Disbursement Schedule Date	Net Amount

Term Code	Term Name	Term Begin Date	Term End Date	Credits Earned	Credits Attempted	Hrs Earned	Hrs Attempted	Enr. Status	Sap Status
2009AY	2009 All year	01/01/2009	12/31/2009	3.00	3.00	90.00	90.00	Less Than Half Time	Not Calculated

Fund Source	Disbursement Status	Disbursement Schedule Date	Net Amount

Registered Credits by Confirmed Terms

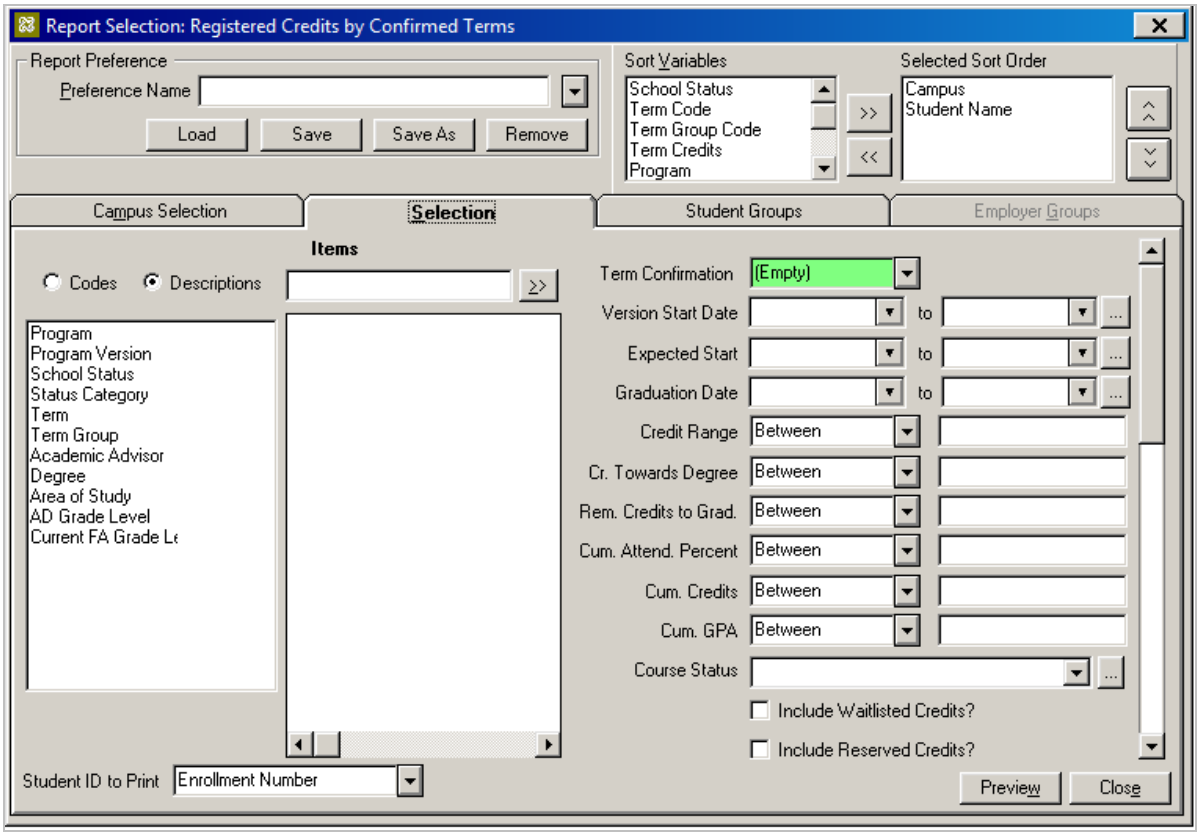
This report shows how many credits a student has registered for in a selected term that is set as a confirmed term.

To run the report:

1. Navigate to **Reports > Academic Records > Registered Credits by Confirmed Terms**. The Report Selection: Registered Credits by Confirmed Terms form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   The Term Confirmation drop-down menu provides the following options:

   - Empty (default) - no filtering on Term Confirmation
   - Yes - filter for students with Confirmed Terms
   - No - filter for students without Term Confirmation

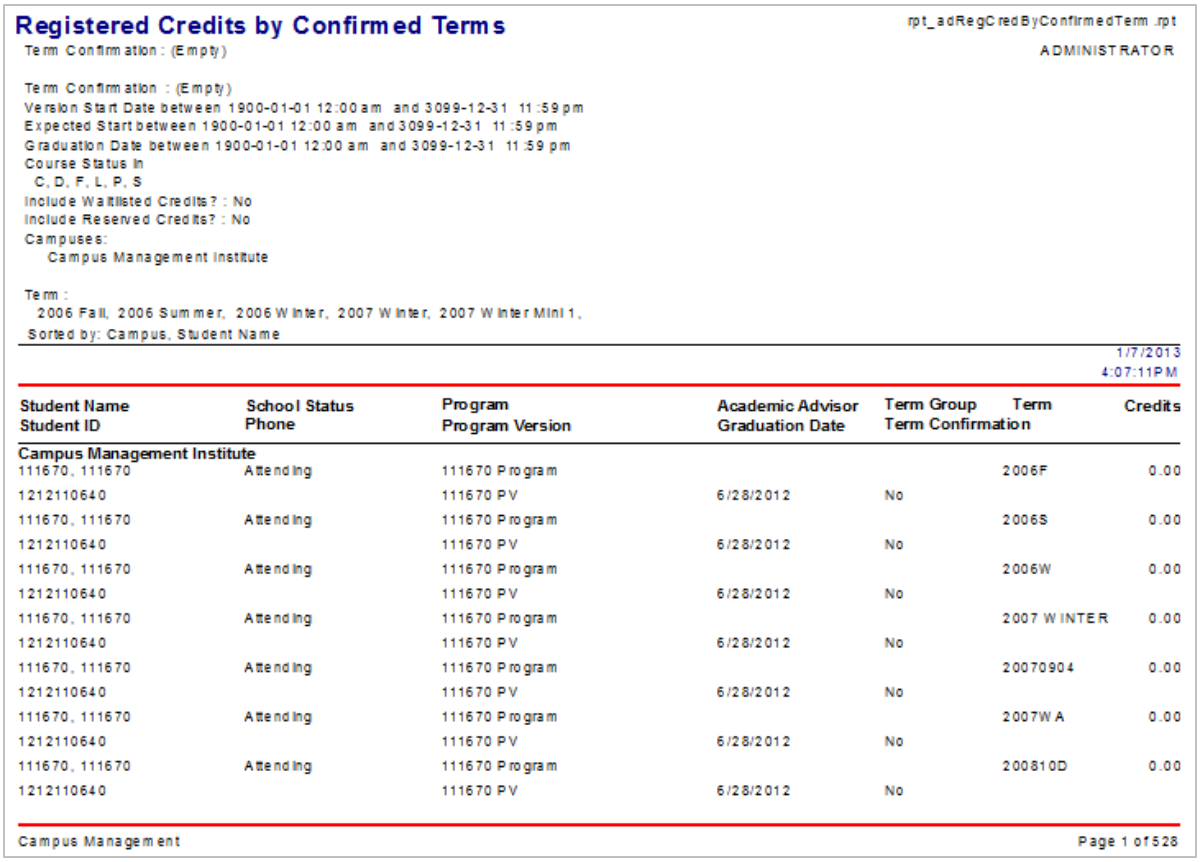


4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

- Student Name
- Student ID
- School Status
- Phone
- Program
- Program Version
- Academic Advisor
- Graduation Date
- Term Group
- Term Confirmation
- Term
- Number of Credits



Registered Credits by Confirmed Terms

rpt_adRegCredByConfirmedTerm.rpt

Term Confirmation : (Empty)

ADMINISTRATOR

Term Confirmation : (Empty)
Version Start Date between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Expected Start between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Graduation Date between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Course Status In
C, D, F, L, P, S
Include Waitlisted Credits? : No
Include Reserved Credits? : No
Campuses:
Campus Management Institute

Term :
2006 Fall, 2006 Summer, 2006 Winter, 2007 Winter, 2007 Winter Mini 1,
Sorted by: Campus, Student Name

1/7/2013
4:07:11PM

Student Name Student ID	School Status Phone	Program Program Version	Academic Advisor Graduation Date	Term Group Term Confirmation	Term	Credits
Campus Management Institute						
111670, 111670	Attending	111670 Program			2006F	0.00
1212110640		111670 PV	6/28/2012	No		
111670, 111670	Attending	111670 Program			2006S	0.00
1212110640		111670 PV	6/28/2012	No		
111670, 111670	Attending	111670 Program			2006W	0.00
1212110640		111670 PV	6/28/2012	No		
111670, 111670	Attending	111670 Program			2007 WINTER	0.00
1212110640		111670 PV	6/28/2012	No		
111670, 111670	Attending	111670 Program			20070904	0.00
1212110640		111670 PV	6/28/2012	No		
111670, 111670	Attending	111670 Program			2007WA	0.00
1212110640		111670 PV	6/28/2012	No		
111670, 111670	Attending	111670 Program			200810D	0.00
1212110640		111670 PV	6/28/2012	No		

Campus Management

Page 1 of 528

Note: From Report Viewer, you can generate a list of students that match the selection criteria and save the list as a Student Group.

Review the report, print it, save it, or use it in a mail merge. You can also export it to Crystal Reports, Excel, Comma-Separated Value (CSV) file, or XML.

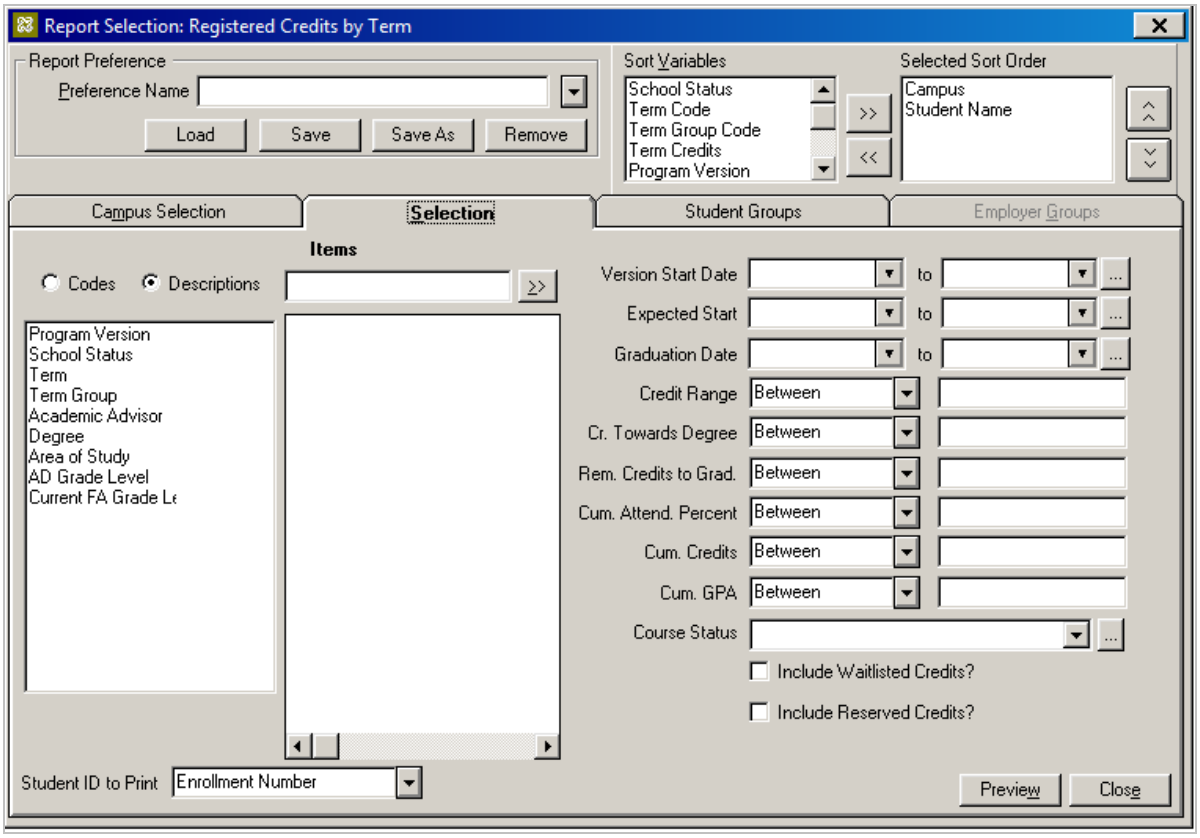
Registered Credits by Term

This report shows how many credits a student has registered for in a selected term. The report satisfies the following questions:

- How many credits is each student scheduled for?
- Who has not registered for any courses in the term and is "Active"? (Number of credits equals zero.)

To run the report:

1. Navigate to **Reports > Academic Records > Registered Credits by Term**. The Report Selection: Registered Credits by Term form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

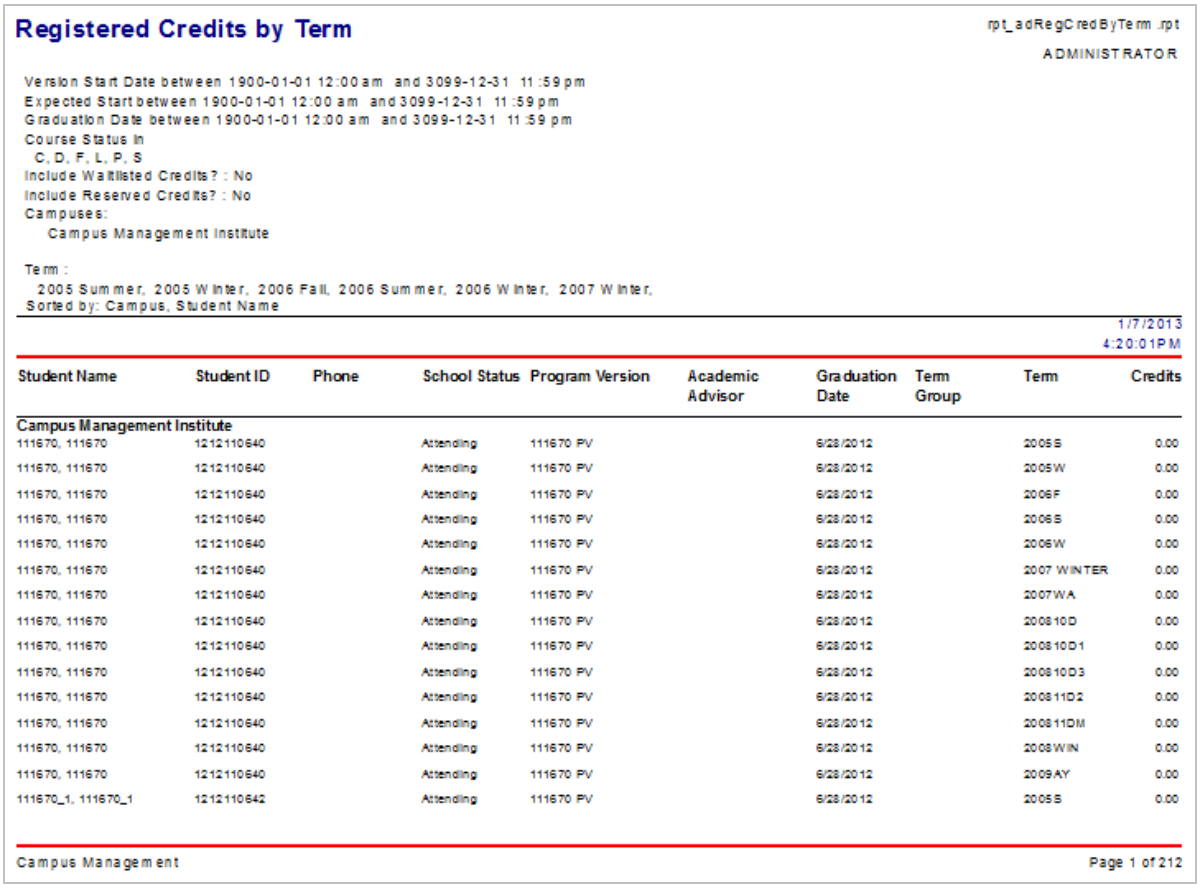
   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Student ID
   - Phone
   - School Status

- Program Version
- Academic Advisor
- Graduation Date
- Term Group
- Term
- Number of Credits



Registered Credits by Term

rpt_adRegCredByTerm .rpt

ADMINISTRATOR

Version Start Date between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Expected Start between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Graduation Date between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Course Status In
C, D, F, L, P, S
Include Waitlisted Credits? : No
Include Reserved Credits? : No
Campuses:
Campus Management Institute

Term :
2005 Summer, 2005 Winter, 2006 Fall, 2006 Summer, 2006 Winter, 2007 Winter,
Sorted by: Campus, Student Name

1/7/2013
4:20:01PM

Student Name	Student ID	Phone	School Status	Program Version	Academic Advisor	Graduation Date	Term Group	Term	Credits
Campus Management Institute									
111670, 111670	1212110640		Attending	111670 PV		6/28/2012		2005S	0.00
111670, 111670	1212110640		Attending	111670 PV		6/28/2012		2005W	0.00
111670, 111670	1212110640		Attending	111670 PV		6/28/2012		2006F	0.00
111670, 111670	1212110640		Attending	111670 PV		6/28/2012		2006S	0.00
111670, 111670	1212110640		Attending	111670 PV		6/28/2012		2006W	0.00
111670, 111670	1212110640		Attending	111670 PV		6/28/2012		2007 WINTER	0.00
111670, 111670	1212110640		Attending	111670 PV		6/28/2012		2007WA	0.00
111670, 111670	1212110640		Attending	111670 PV		6/28/2012		200810D	0.00
111670, 111670	1212110640		Attending	111670 PV		6/28/2012		200810D1	0.00
111670, 111670	1212110640		Attending	111670 PV		6/28/2012		200810D3	0.00
111670, 111670	1212110640		Attending	111670 PV		6/28/2012		200811D2	0.00
111670, 111670	1212110640		Attending	111670 PV		6/28/2012		200811DM	0.00
111670, 111670	1212110640		Attending	111670 PV		6/28/2012		2008WIN	0.00
111670, 111670	1212110640		Attending	111670 PV		6/28/2012		2009AY	0.00
111670_1, 111670_1	1212110642		Attending	111670 PV		6/28/2012		2005S	0.00

Campus Management

Page 1 of 212

Note: From Report Viewer, you can generate a list of students that match the selection criteria and save the list as a Student Group.

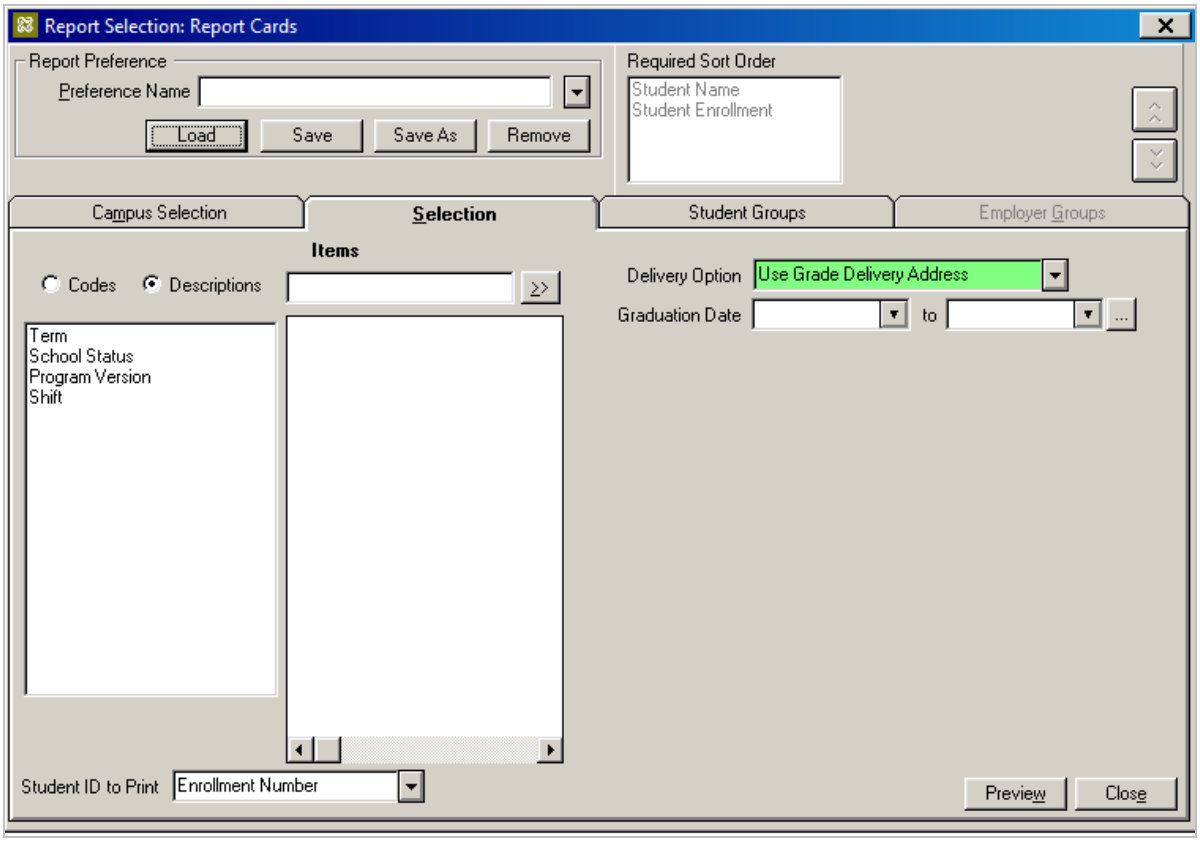
Report Cards

This report produces Report Cards by term for each student.

To run the report:

1. Navigate to **Reports > Academic Records > Report Cards**. The Report Selection: Report Cards form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Note: The 'Delivery Option' choices are **User Student Master Address** and **Use Grade Delivery Address**. If you select 'Use Grade Delivery Address', only students who have the 'Grade Address' type added under the View > Contact Manager > Address form are included in the report.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

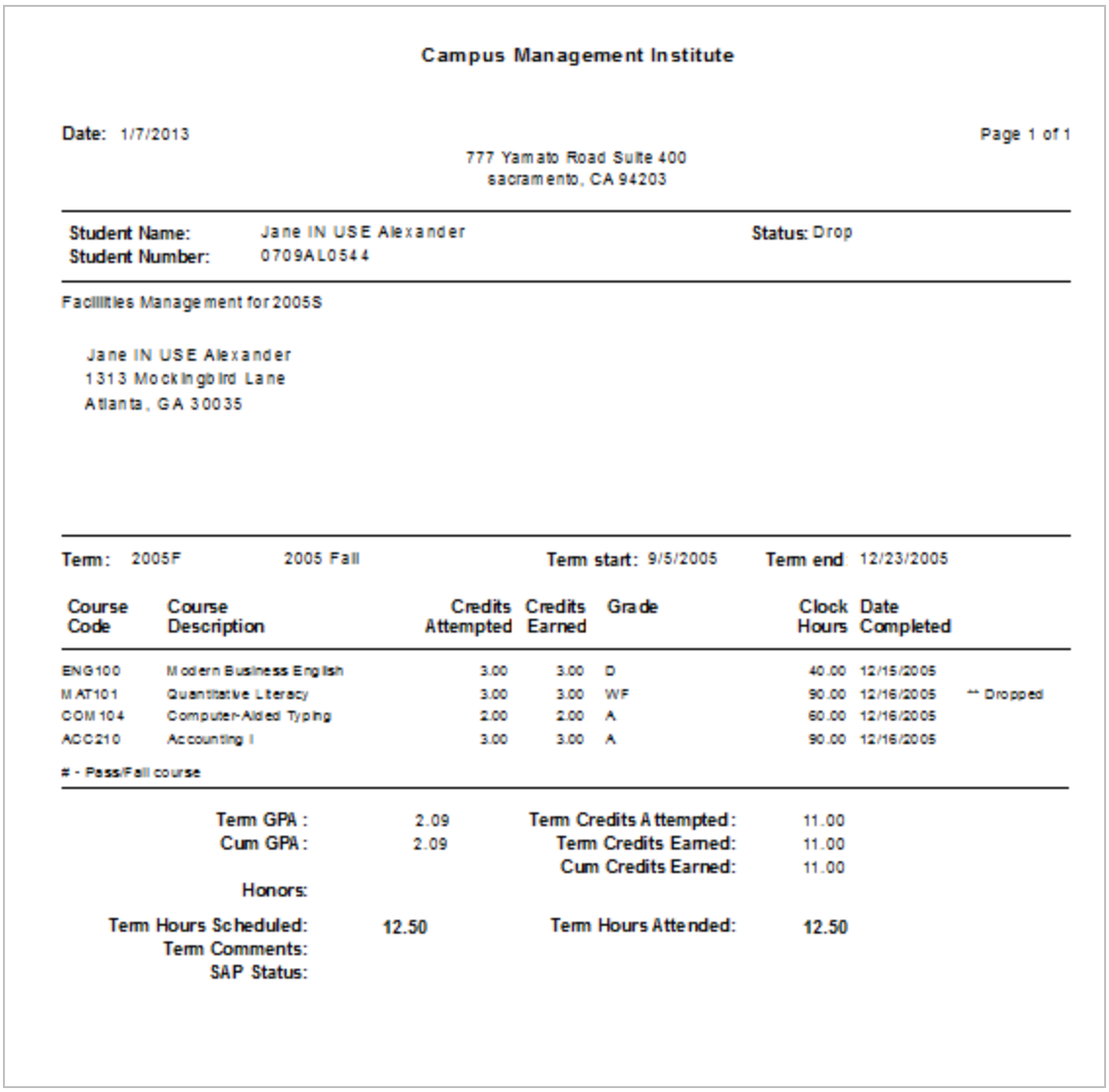
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   Header information on the report card includes the date printed and the campus name and address. Header information for the student includes name, identifier (ID, enrollment number, or SSN), and status in school. The header also includes the program version description, term code and description, and the term start and end dates.

Detail lines include course code, description, credits attempted, credits earned, letter grade, numeric grade, clock hours, honors, and date completed.

The report also includes the student's term GPA, cumulative GPA, term credits attempted, term credits earned, cumulative credits earned, term hours scheduled, and term hours attended.

If the student has elected to take a class on a pass/fail basis, a note is displayed next to the course. The letter grade reflects the pass/fail grade scale in these instances.



Campus Management Institute

Date: 1/7/2013 Page 1 of 1

777 Yamato Road Suite 400
sacramento, CA 94203

Student Name: Jane IN USE Alexander **Status:** Drop
Student Number: 0709AL0544

Facilities Management for 2005S

Jane IN USE Alexander
1313 Mockingbird Lane
Atlanta, GA 30035

Term: 2005F 2005 Fall **Term start:** 9/5/2005 **Term end** 12/23/2005

Course Code	Course Description	Credits Attempted	Credits Earned	Grade	Clock Hours	Date Completed	
ENG100	Modern Business English	3.00	3.00	D	40.00	12/15/2005	
MAT101	Quantitative Literacy	3.00	3.00	WF	90.00	12/16/2005	** Dropped
COM104	Computer-Aided Typing	2.00	2.00	A	60.00	12/16/2005	
ACC210	Accounting I	3.00	3.00	A	90.00	12/16/2005	

- Pass/Fail course

Term GPA:	2.09	**Term Credits Attempted:**	11.00
Cum GPA:	2.09	**Term Credits Earned:**	11.00
		Cum Credits Earned:	11.00
Honors:			
Term Hours Scheduled:	12.50	**Term Hours Attended:**	12.50
Term Comments:			
SAP Status:			

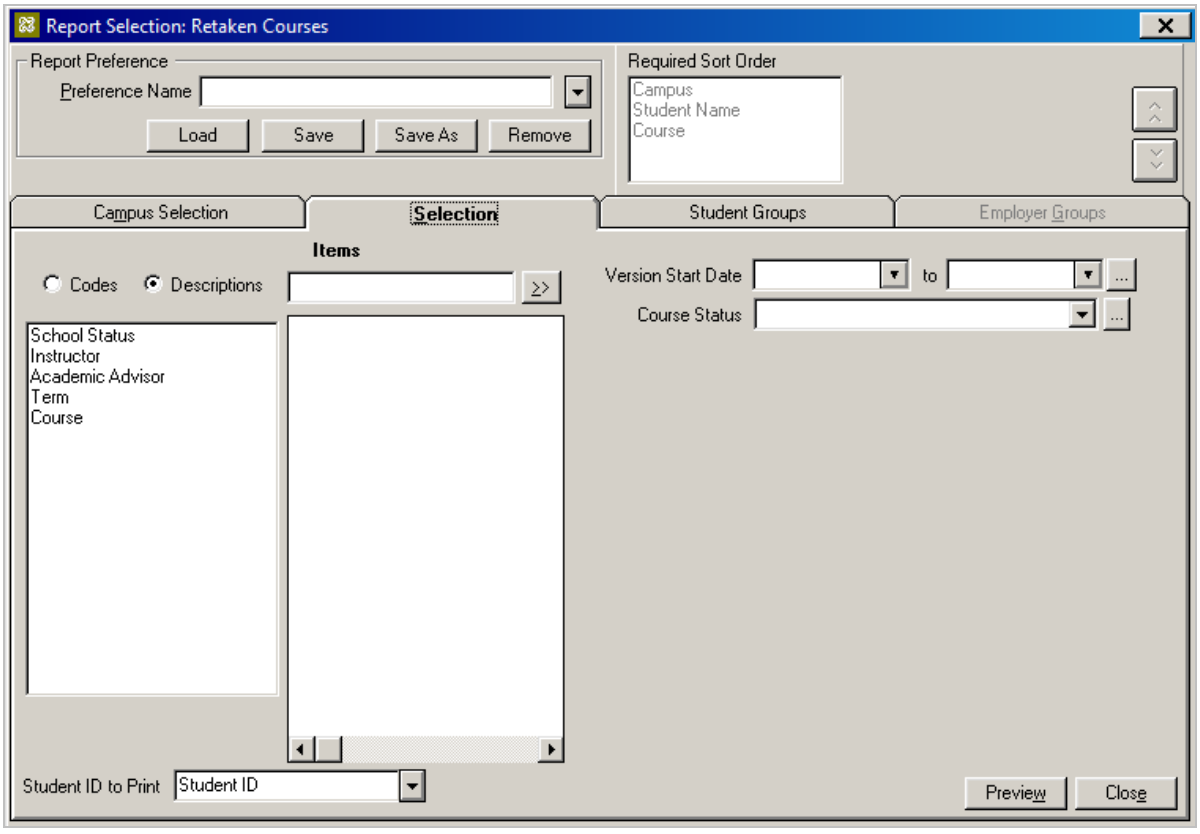
Retaken Courses

This report displays students who have been scheduled or registered to retake a class even though a grade has not been posted.

By using the Retake Override flag (View > Academic Records > Final Grades), the Retaken Courses report and the Final Grades form display the retake courses independent of the class status. The Final Grades form displays the courses as retakes. The GPA calculation does not reset the Retake Override flag. For more information, see Grading and Retakes.

To run the report:

1. Navigate to **Reports > Academic Records > Retaken Courses**. The Report Selection: Retaken Courses form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

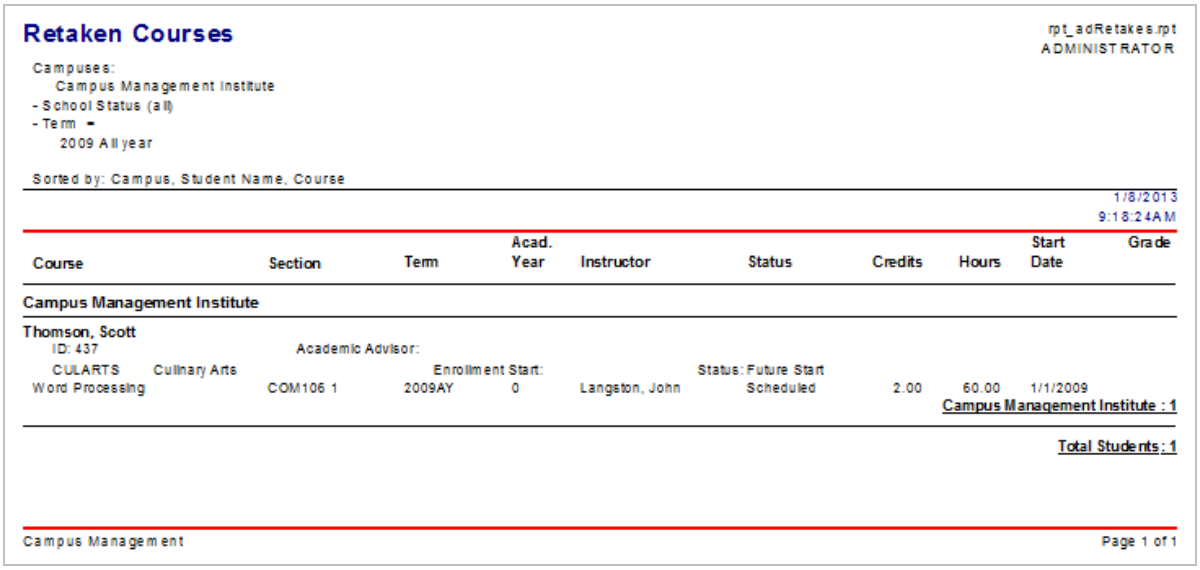
   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Course Description
   - Class Section

- Term
- Academic Year
- Instructor
- Student Status
- Credits
- Hours
- Start Date
- Grade



Retaken Courses

rpt_adRetakes.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- School Status (all)
- Term -
2009 All year

Sorted by: Campus, Student Name, Course

1/8/2013
9:18:24AM

Course	Section	Term	Acad. Year	Instructor	Status	Credits	Hours	Start Date	Grade
Campus Management Institute									
Thomson, Scott									
ID: 437		Academic Advisor:							
CULARTS Culinary Arts		Enrollment Start:			Status: Future Start				
Word Processing	COM106 1	2009AY	0	Langston, John	Scheduled	2.00	60.00	1/1/2009	
								Campus Management Institute : 1	
								Total Students: 1	

Campus Management
Page 1 of 1

SAP Audit Report

This report contains information stored in the SAP Audit, for example:

- SAP date
- Name of the operator who ran the SAP
- SAP status posted
- Failed sequence number

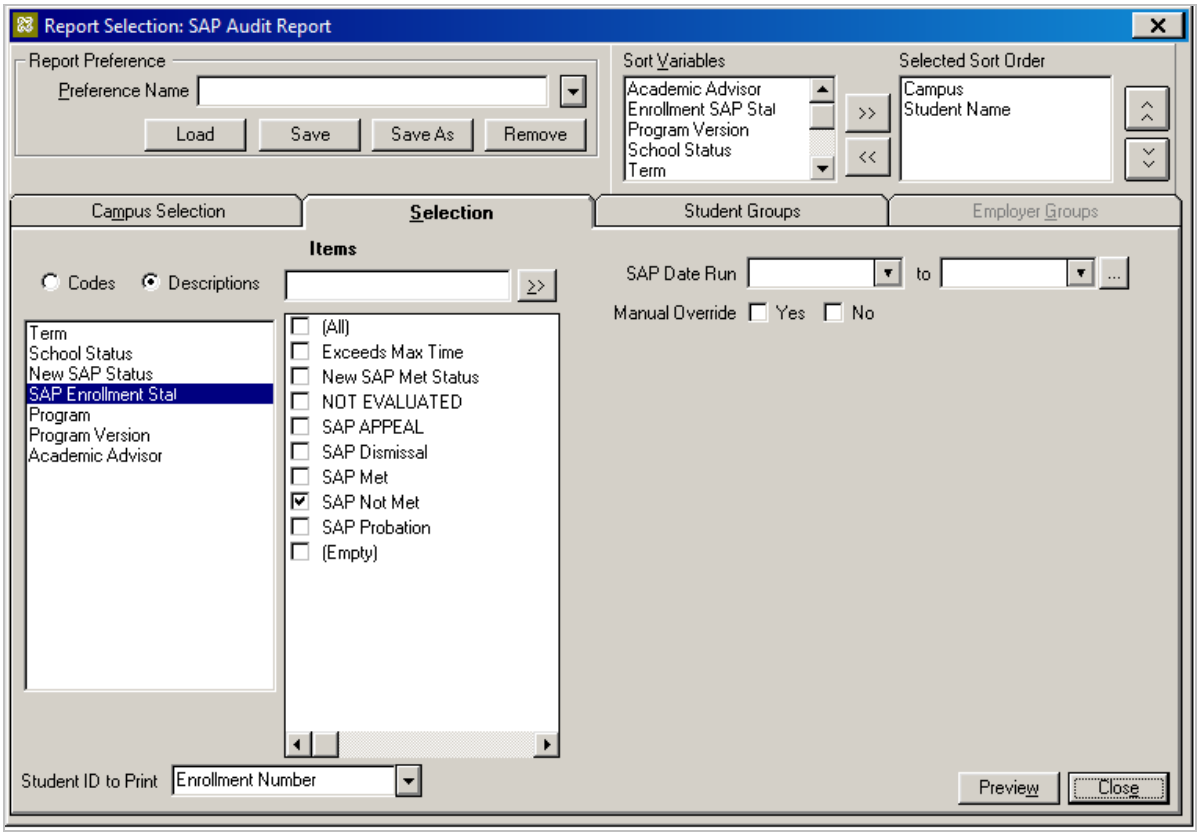
You can include all detail records from all students included in the SAP run, or to only include students where a manual override of SAP status occurred. See also SAP status override security setup.

To run the report:

1. Navigate to **Reports > Academic Records > SAP Audit Report**. The Report Selection: SAP Audit Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   You may run the report by:

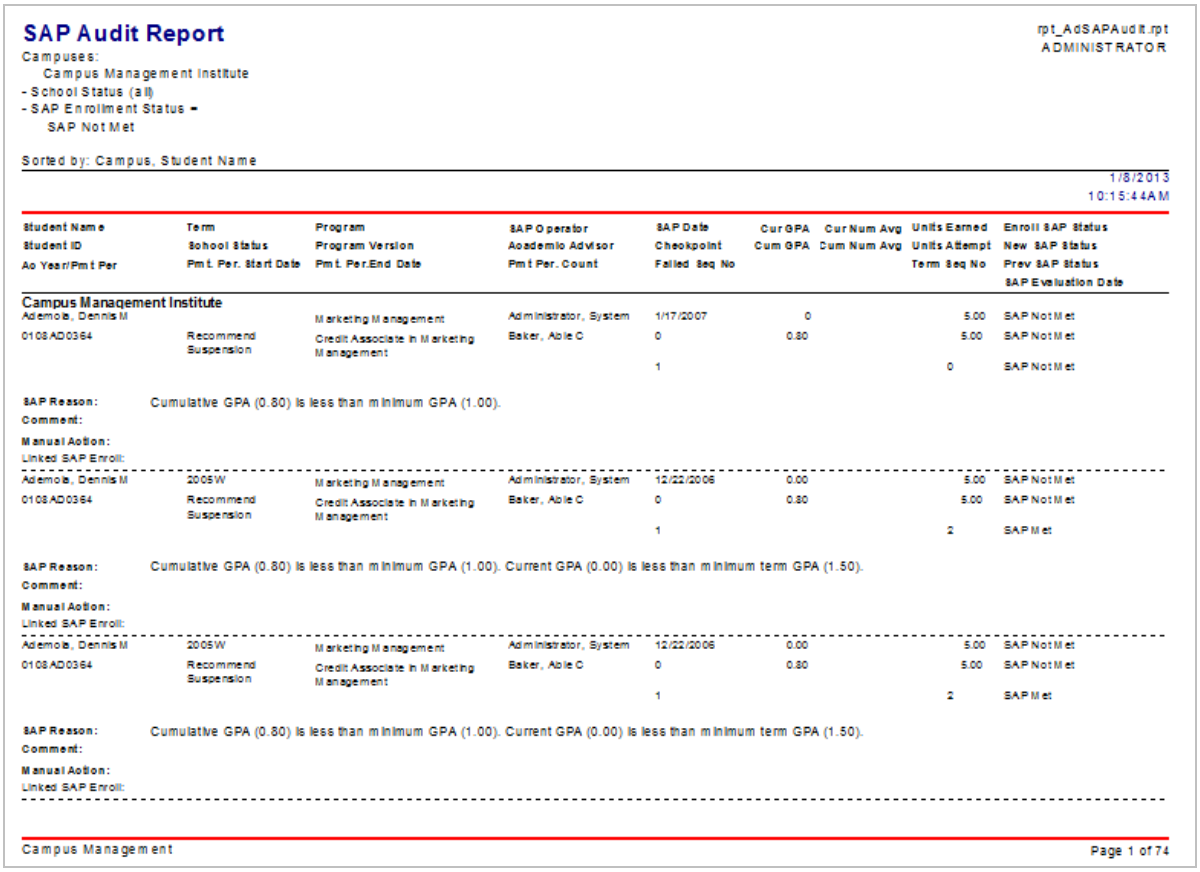
   - Identifying the date and user of SAP calculation for selected campuses
   - A prior SAP batch by campus and term (all students evaluated in SAP calculation will be included)
   - Identifying a student's previous SAP status, new SAP status, if manually overridden, related comments, and user who made changes, or
   - Identifying only those students whose SAP status was manually overridden.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.



SAP Audit Report

rpt_AdSAPAudit.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- School Status (all)
- SAP Enrollment Status =
SAP Not Met

Sorted by: Campus, Student Name

1/8/2013
10:15:44AM

Student Name / Student ID / Ac Year/Pmt Per	Term / School Status / Pmt. Per. Start Date	Program / Program Version / Pmt. Per.End Date	SAP Operator / Academic Advisor / Pmt Per. Count	SAP Date / Checkpoint / Failed Seq No	Cur GPA / Cum GPA	Cur Num Avg / Cum Num Avg	Units Earned / Units Attempt / Term Seq No	Enroll SAP Status / New SAP Status / Prev SAP Status / SAP Evaluation Date
Campus Management Institute								
Ademola, Dennis M		Marketing Management	Administrator, System	1/17/2007	0		5.00	SAP Not Met
0108AD0364	Recommend Suspension	Credit Associate in Marketing Management	Baker, Able C	0	0.80		5.00	SAP Not Met
				1			0	SAP Not Met
SAP Reason:	Cumulative GPA (0.80) is less than minimum GPA (1.00).							
Comment:								
Manual Action:								
Linked SAP Enroll:								
Ademola, Dennis M	2005W	Marketing Management	Administrator, System	12/22/2006	0.00		5.00	SAP Not Met
0108AD0364	Recommend Suspension	Credit Associate in Marketing Management	Baker, Able C	0	0.80		5.00	SAP Not Met
				1			2	SAP Met
SAP Reason:	Cumulative GPA (0.80) is less than minimum GPA (1.00). Current GPA (0.00) is less than minimum term GPA (1.50).							
Comment:								
Manual Action:								
Linked SAP Enroll:								
Ademola, Dennis M	2005W	Marketing Management	Administrator, System	12/22/2006	0.00		5.00	SAP Not Met
0108AD0364	Recommend Suspension	Credit Associate in Marketing Management	Baker, Able C	0	0.80		5.00	SAP Not Met
				1			2	SAP Met
SAP Reason:	Cumulative GPA (0.80) is less than minimum GPA (1.00). Current GPA (0.00) is less than minimum term GPA (1.50).							
Comment:								
Manual Action:								
Linked SAP Enroll:								

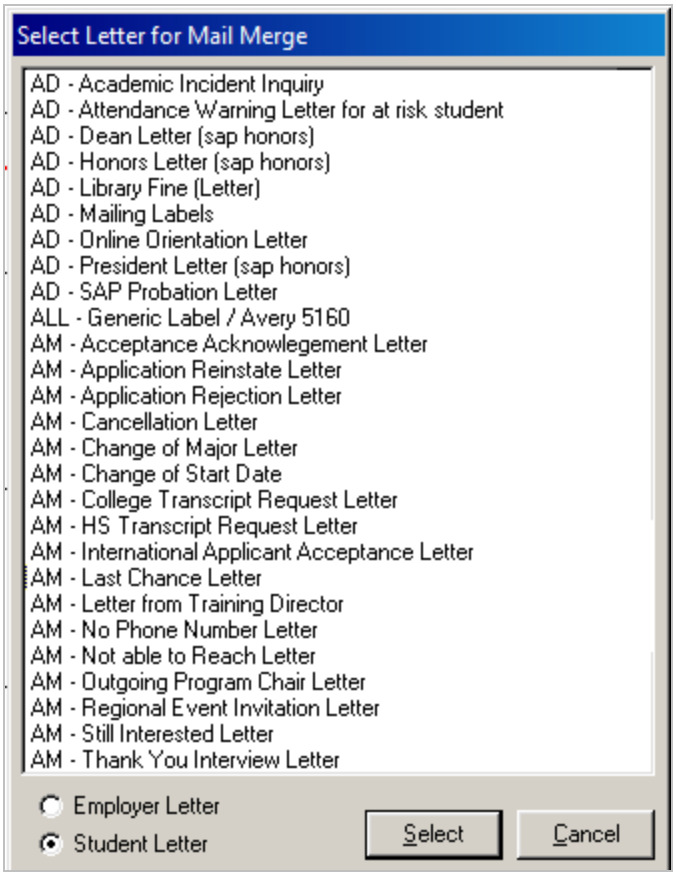
Campus Management

Page 1 of 74

You can generate SAP Failure Letters directly from the report in the Report Viewer.

a. In the Report Viewer, select the **Mail Merge** menu option.

b. Select the configured SAP failure letter activity from the list of mail merge options in the **Select Letter for Mail Merge** form.



c. Click **Select**.

   Note: When you click Select, SAP Failure Letters are printed for every student on the report. To print SAP Failure Letters only for students who did not meet SAP, re-run the report with the SAP Status selection that represent students not meeting SAP and then generate the SAP Failure Letters from that report.

d. On the Mail Merge confirmation message, click **Yes** to proceed or click **No** to cancel the mail merge request.

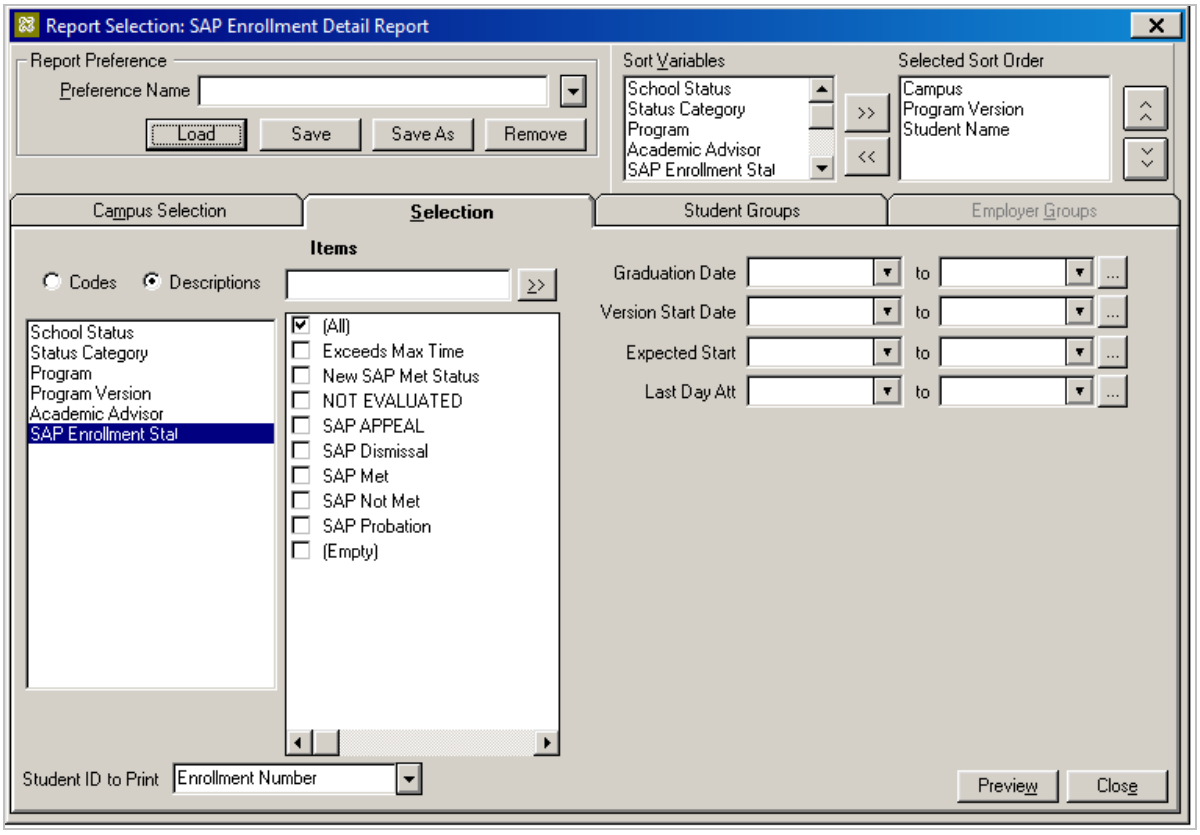
SAP Enrollment Detail Report

This report shows the SAP status as it is displayed on the student's Enrollment Progress tab.

Note: The SAP Enrollment Detail Report includes students that are evaluated by payment period. To run an SAP report only on students evaluated by payment period, use the SAP Payment Period Detail Report.

To run the report:

1. Navigate to **Reports > Academic Records > SAP Enrollment Detail Report**. The Report Selection: SAP Enrollment Detail Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

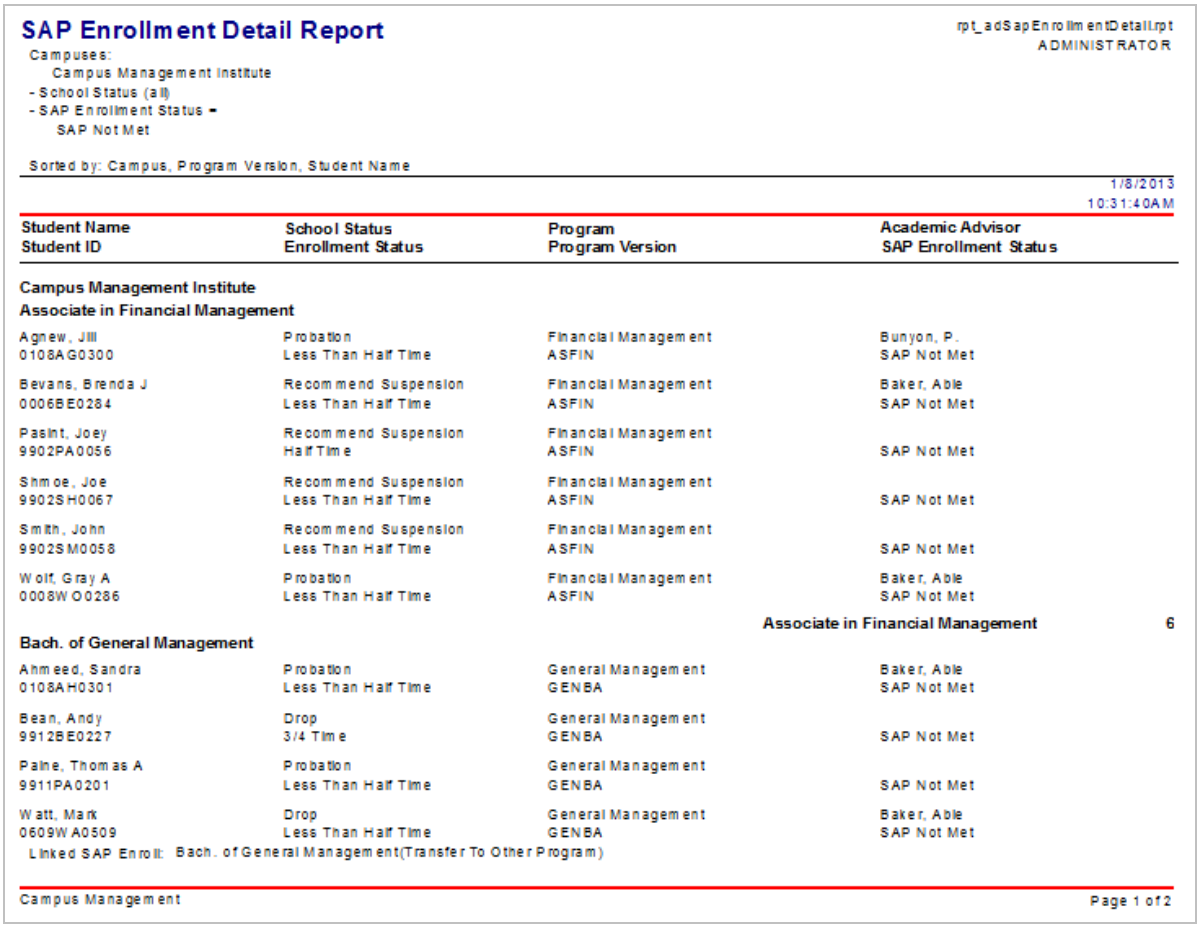
   - Student Name
   - Student ID
   - School Status
   - Enrollment Status

- Program
- Program Version
- Academic Advisor
- SAP Enrollment Status

Additional fields in the Excel output view include:

- Graduation Date
- Version Start Date
- Expected Start
- Last Day Attended

Any linked SAP enrollment is displayed in the field labeled 'Linked SAP Enroll'.



SAP Enrollment Detail Report

rpt_adSapEnrollmentDetail.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- School Status (all)
- SAP Enrollment Status =
SAP Not Met

Sorted by: Campus, Program Version, Student Name

1/8/2013
10:31:40AM

Student Name / Student ID	School Status / Enrollment Status	Program / Program Version	Academic Advisor / SAP Enrollment Status	
Campus Management Institute				
Associate in Financial Management				
Agnew, Jill 0108AG0300	Probation Less Than Half Time	Financial Management ASFIN	Bunyon, P. SAP Not Met	
Bevans, Brenda J 0006BE0284	Recommend Suspension Less Than Half Time	Financial Management ASFIN	Baker, Able SAP Not Met	
Pasint, Joey 9902PA0056	Recommend Suspension Half Time	Financial Management ASFIN	SAP Not Met	
Shmoe, Joe 9902SH0067	Recommend Suspension Less Than Half Time	Financial Management ASFIN	SAP Not Met	
Smith, John 9902SM0058	Recommend Suspension Less Than Half Time	Financial Management ASFIN	SAP Not Met	
Wolf, Gray A 0008WO0286	Probation Less Than Half Time	Financial Management ASFIN	Baker, Able SAP Not Met	
			Associate in Financial Management	6
Bach. of General Management				
Ahmeed, Sandra 0108AH0301	Probation Less Than Half Time	General Management GENBA	Baker, Able SAP Not Met	
Bean, Andy 9912BE0227	Drop 3/4 Time	General Management GENBA	SAP Not Met	
Paine, Thomas A 9911PA0201	Probation Less Than Half Time	General Management GENBA	SAP Not Met	
Watt, Mark 0609WA0509	Drop Less Than Half Time	General Management GENBA	Baker, Able SAP Not Met	
Linked SAP Enroll: Bach. of General Management(Transfer To Other Program)				

Campus Management

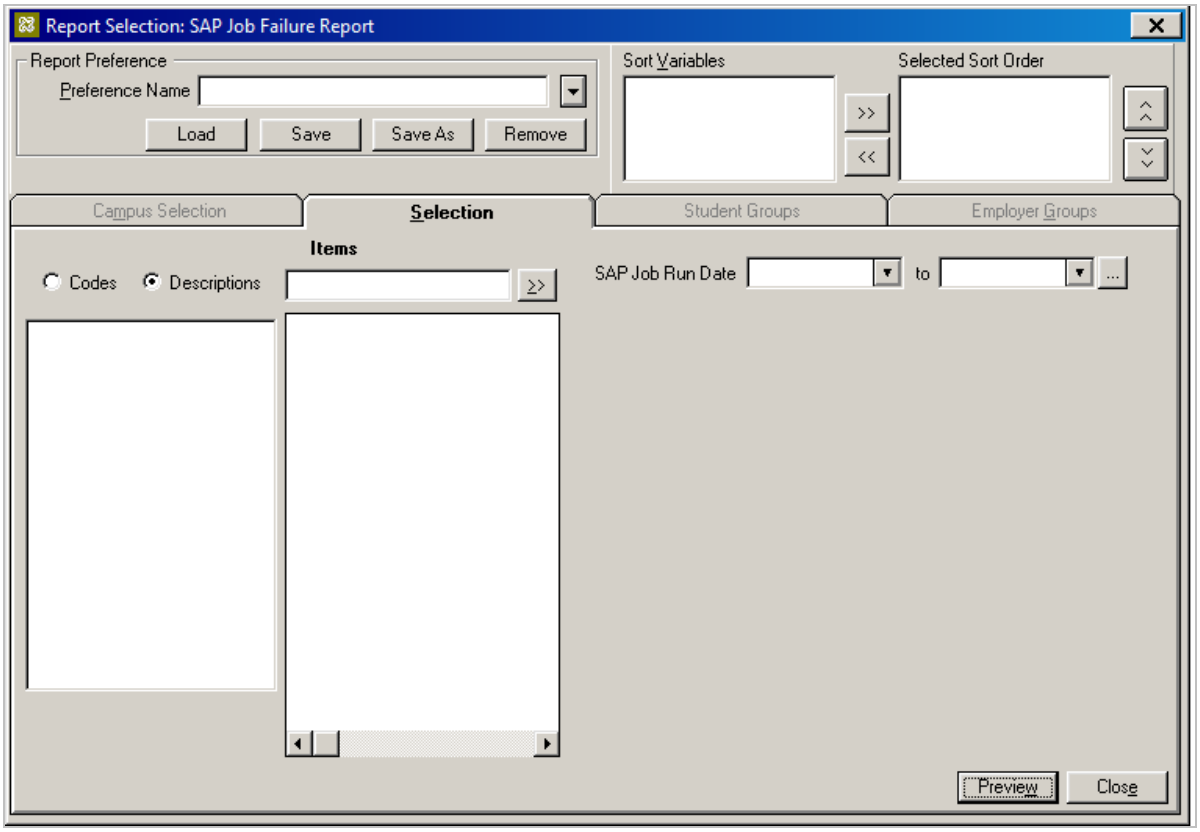
Page 1 of 2

SAP Job Failure Report

This report displays SAP job run failures.

To run the report:

1. Navigate to **Reports > Academic Records > SAP Job Failure Report**. The Report Selection: SAP Job Failure Report form is displayed.
2. Select appropriate options on the Selection tab.



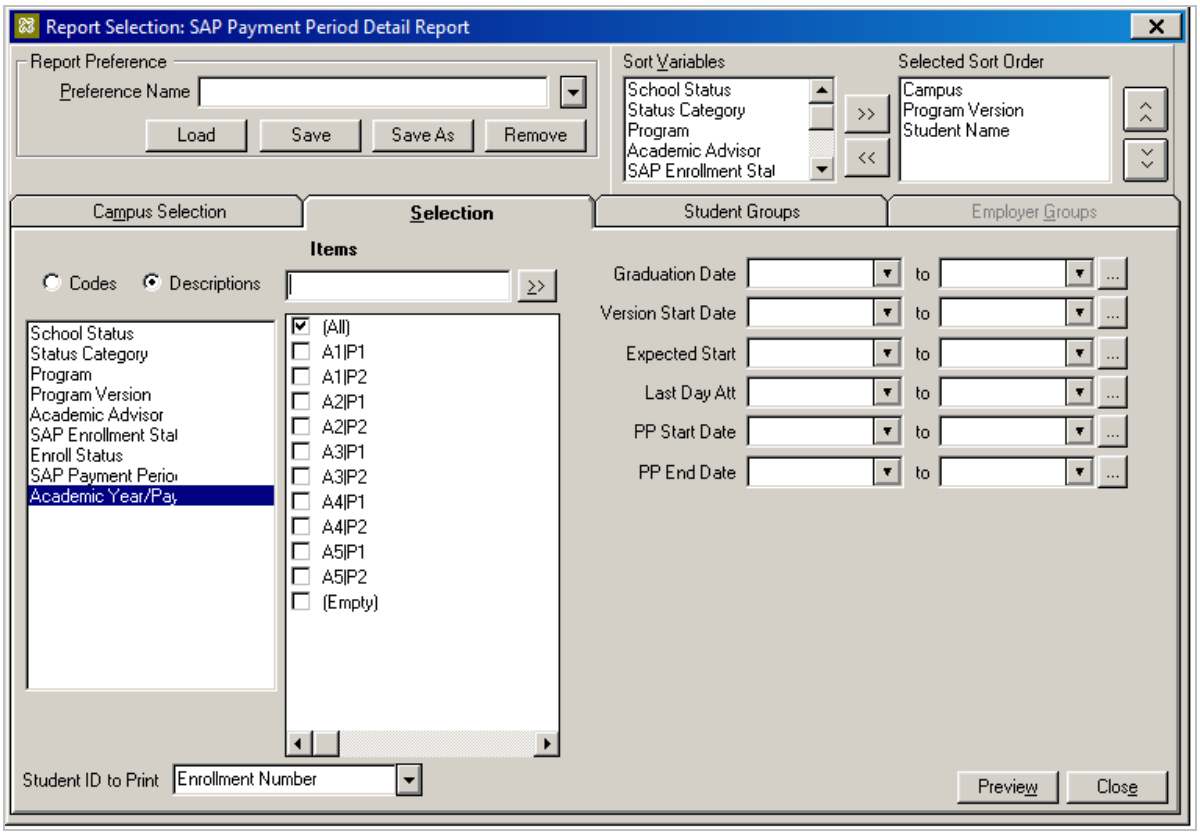
3. Click **Preview**. The report is assembled and displayed in the Report Viewer.

SAP Payment Period Detail Report

This report displays students that are evaluated by Academic Years/Payment Period. The SAP Payment Period Detail Report is similar to the SAP Term Detail Report, except that it is based on Academic Years/Payment Periods instead of Terms.

To run the report:

1. Navigate to **Reports > Academic Records > SAP Payment Period Detail Report**. The Report Selection: SAP Payment Period Detail Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

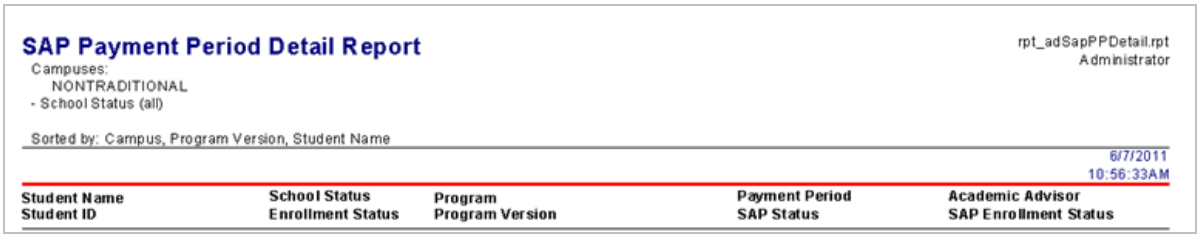
   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Student ID
   - School Status
   - Enrollment Status
   - Program

- Program Version
- Payment Period
- SAP Status
- Academic Advisor
- SAP Enrollment Status

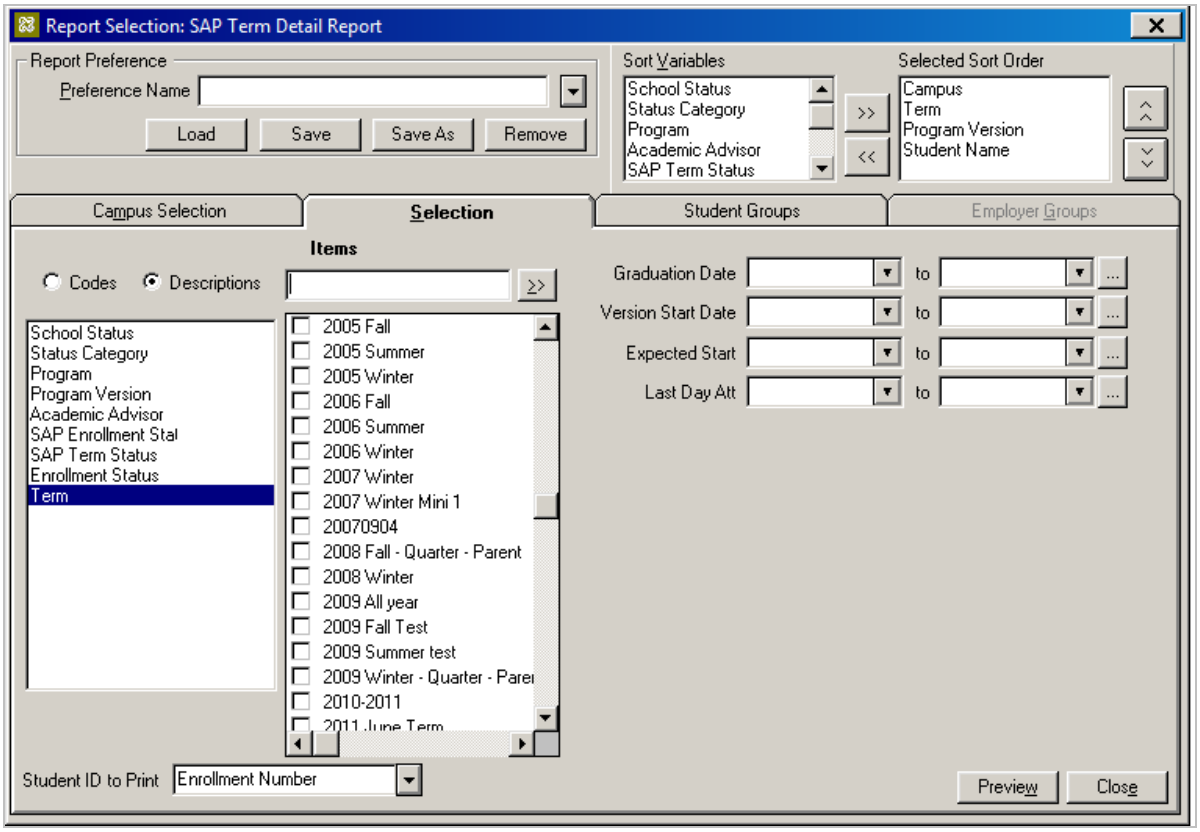


SAP Term Detail Report

This report shows the SAP status for each term as it is displayed on the student's Enrollment Term Summary tab.

To run the report:

1. Navigate to **Reports > Academic Records > SAP Term Detail Report**. The Report Selection: SAP Term Detail Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

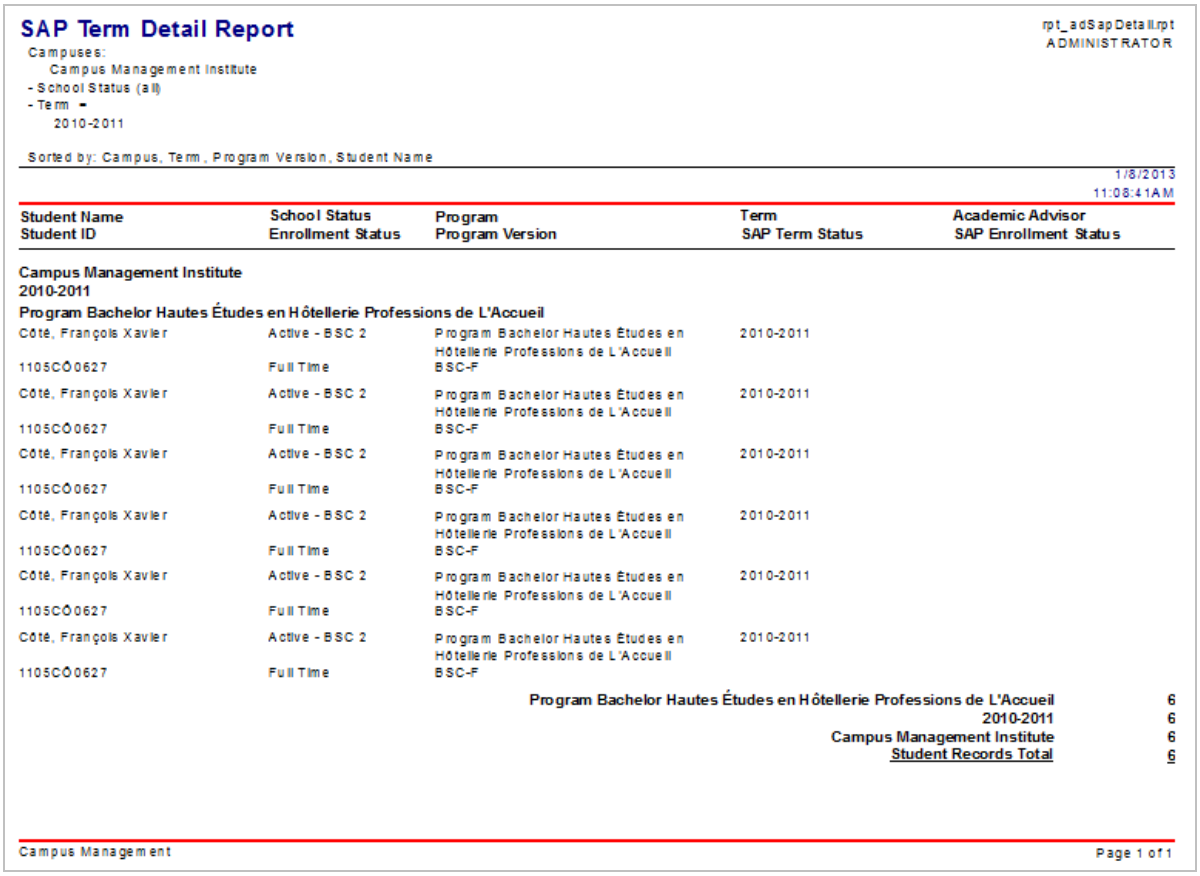
   - Student Name
   - Student ID
   - School Status
   - Enrollment Status
   - Program
   - Program Version

- Term
- SAP Term Status
- Academic Advisor
- SAP Enrollment Status

Additional fields in the Excel output view include:

- Graduation Date
- Version Start Date
- Expected Start
- Last Day Attended

Any linked SAP enrollment is displayed in the field labeled 'Linked SAP Enroll'.



SAP Term Detail Report

rpt_adSapDetail.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- School Status (all)
- Term =
2010-2011

Sorted by: Campus, Term, Program Version, Student Name

1/8/2013
11:08:41AM

Student Name Student ID	School Status Enrollment Status	Program Program Version	Term SAP Term Status	Academic Advisor SAP Enrollment Status
Campus Management Institute **2010-2011** **Program Bachelor Hautes Études en Hôtellerie Professions de L'Accueil**				
Côté, François Xavier 1105CÔ0627	Active - BSC 2 Full Time	Program Bachelor Hautes Études en Hôtellerie Professions de L'Accueil BSC-F	2010-2011	
Côté, François Xavier 1105CÔ0627	Active - BSC 2 Full Time	Program Bachelor Hautes Études en Hôtellerie Professions de L'Accueil BSC-F	2010-2011	
Côté, François Xavier 1105CÔ0627	Active - BSC 2 Full Time	Program Bachelor Hautes Études en Hôtellerie Professions de L'Accueil BSC-F	2010-2011	
Côté, François Xavier 1105CÔ0627	Active - BSC 2 Full Time	Program Bachelor Hautes Études en Hôtellerie Professions de L'Accueil BSC-F	2010-2011	
Côté, François Xavier 1105CÔ0627	Active - BSC 2 Full Time	Program Bachelor Hautes Études en Hôtellerie Professions de L'Accueil BSC-F	2010-2011	
Côté, François Xavier 1105CÔ0627	Active - BSC 2 Full Time	Program Bachelor Hautes Études en Hôtellerie Professions de L'Accueil BSC-F	2010-2011	

Program Bachelor Hautes Études en Hôtellerie Professions de L'Accueil	**6**
2010-2011	**6**
Campus Management Institute	**6**
Student Records Total	**6**

Campus Management

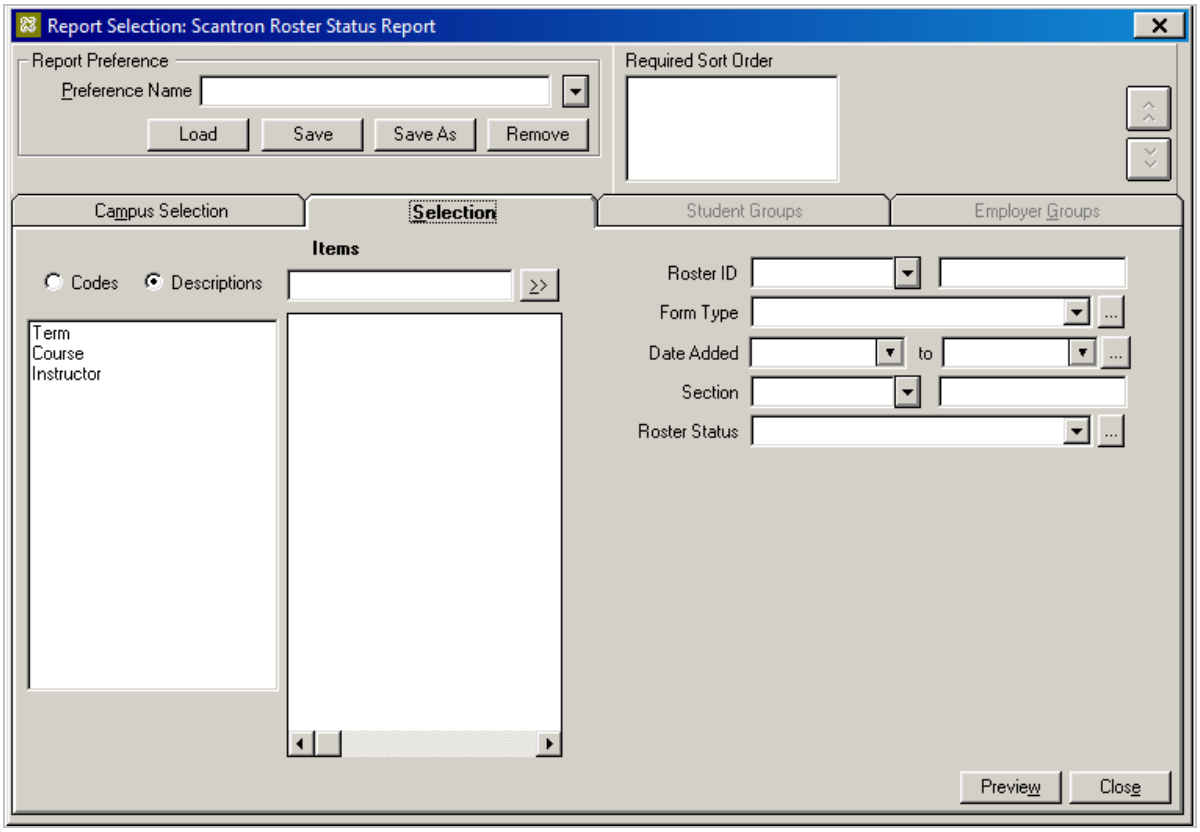
Page 1 of 1

Scantron Roster Status Report

This report is used to track Scantron Attendance and Final Grade forms.

To run the report:

1. Navigate to **Reports > Academic Records > Scantron Roster Status Report**. The Report Selection: Scantron Roster Status Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

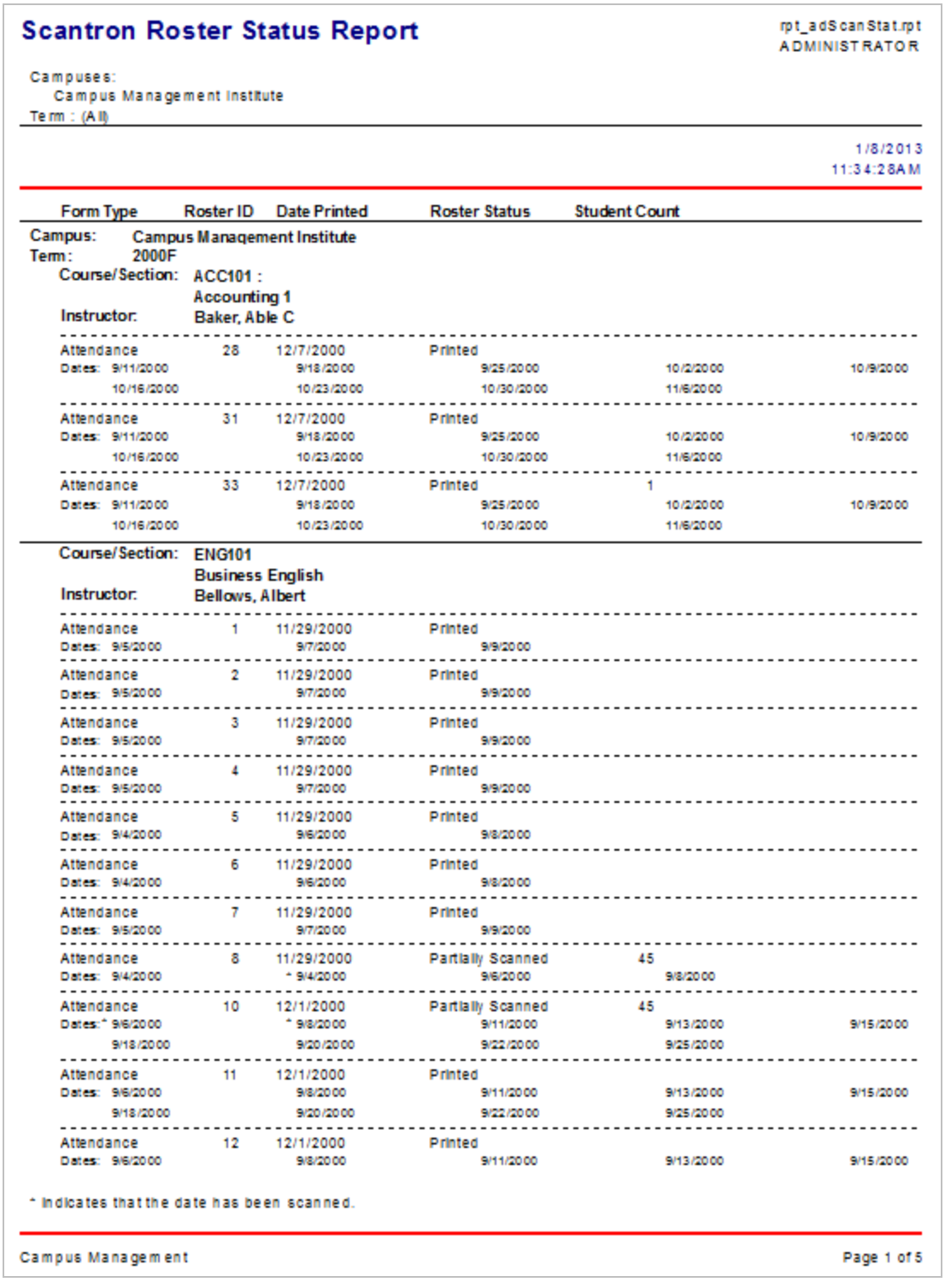


4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Campus
   - Term
   - Course/Section
   - Instructor
   - Form Type
   - Roster ID
   - Date Printed
   - Roster Status and dates included (for attendance only) on the form
   - Student Count

An asterisk (*) flags attendance dates that have been scanned.



Scantron Roster Status Report

rpt_adScanStat.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
Term : (All)

1/8/2013
11:34:28AM

Form Type	Roster ID	Date Printed	Roster Status	Student Count		
Campus: Campus Management Institute						
Term: 2000F						
Course/Section: ACC101 : Accounting 1						
Instructor: Baker, Able C						
Attendance	28	12/7/2000	Printed			
Dates: 9/11/2000		9/18/2000	9/25/2000	10/2/2000	10/9/2000	10/16/2000
		10/23/2000	10/30/2000	11/6/2000		
Attendance	31	12/7/2000	Printed			
Dates: 9/11/2000		9/18/2000	9/25/2000	10/2/2000	10/9/2000	10/16/2000
		10/23/2000	10/30/2000	11/6/2000		
Attendance	33	12/7/2000	Printed	1		
Dates: 9/11/2000		9/18/2000	9/25/2000	10/2/2000	10/9/2000	10/16/2000
		10/23/2000	10/30/2000	11/6/2000		
Course/Section: ENG101 Business English						
Instructor: Bellows, Albert						
Attendance	1	11/29/2000	Printed			
Dates: 9/5/2000		9/7/2000	9/9/2000			
Attendance	2	11/29/2000	Printed			
Dates: 9/5/2000		9/7/2000	9/9/2000			
Attendance	3	11/29/2000	Printed			
Dates: 9/5/2000		9/7/2000	9/9/2000			
Attendance	4	11/29/2000	Printed			
Dates: 9/5/2000		9/7/2000	9/9/2000			
Attendance	5	11/29/2000	Printed			
Dates: 9/4/2000		9/6/2000	9/8/2000			
Attendance	6	11/29/2000	Printed			
Dates: 9/4/2000		9/6/2000	9/8/2000			
Attendance	7	11/29/2000	Printed			
Dates: 9/5/2000		9/7/2000	9/9/2000			
Attendance	8	11/29/2000	Partially Scanned	45		
Dates: 9/4/2000		* 9/4/2000	9/6/2000	9/8/2000		
Attendance	10	12/1/2000	Partially Scanned	45		
Dates: * 9/6/2000		* 9/8/2000	9/11/2000	9/13/2000	9/15/2000	9/18/2000
		9/20/2000	9/22/2000	9/25/2000		
Attendance	11	12/1/2000	Printed			
Dates: 9/6/2000		9/8/2000	9/11/2000	9/13/2000	9/15/2000	9/18/2000
		9/20/2000	9/22/2000	9/25/2000		
Attendance	12	12/1/2000	Printed			
Dates: 9/6/2000		9/8/2000	9/11/2000	9/13/2000	9/15/2000	

* Indicates that the date has been scanned.

Campus Management

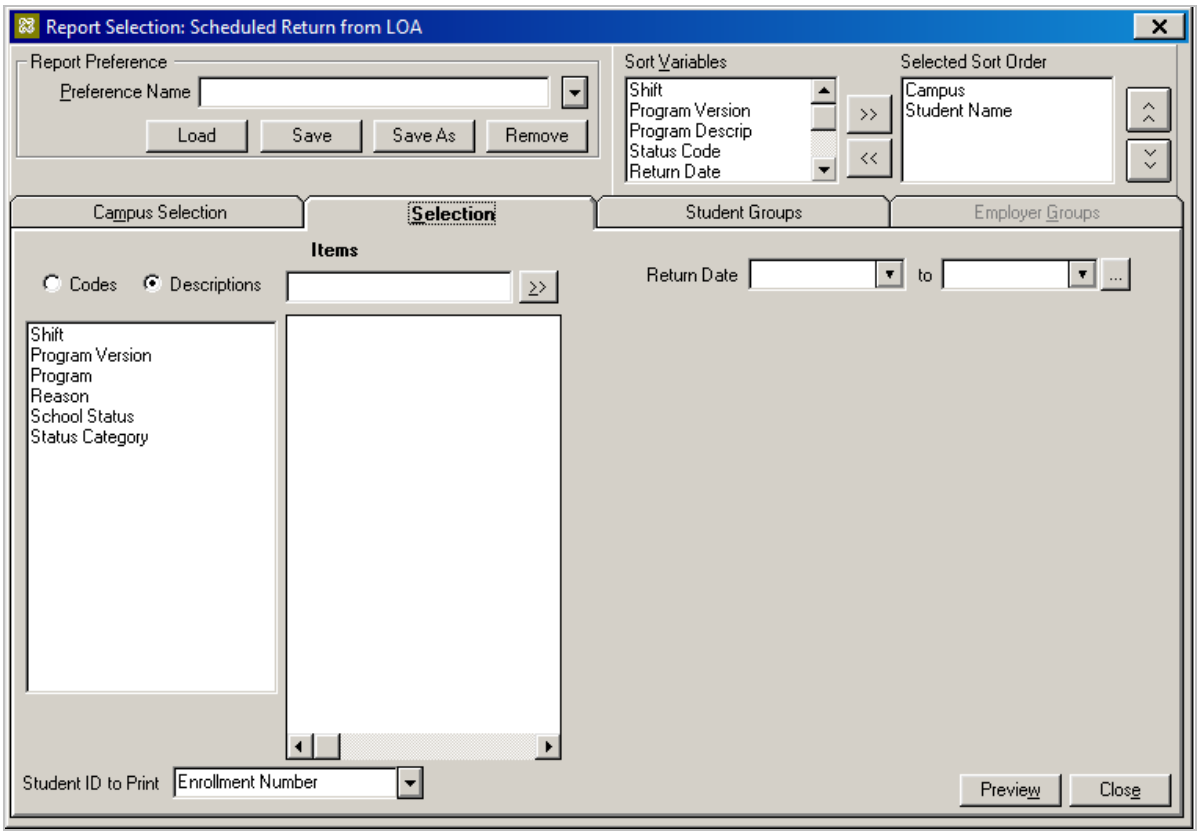
Page 1 of 5

Scheduled Return from LOA

The Scheduled Return from Leave of Absence (LOA) report provides a list of students scheduled to return from LOA within a date range that you provide.

To run the report:

1. Navigate to **Reports > Academic Records > Scheduled Return from LOA**. The Report Selection: Scheduled Return from LOA form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

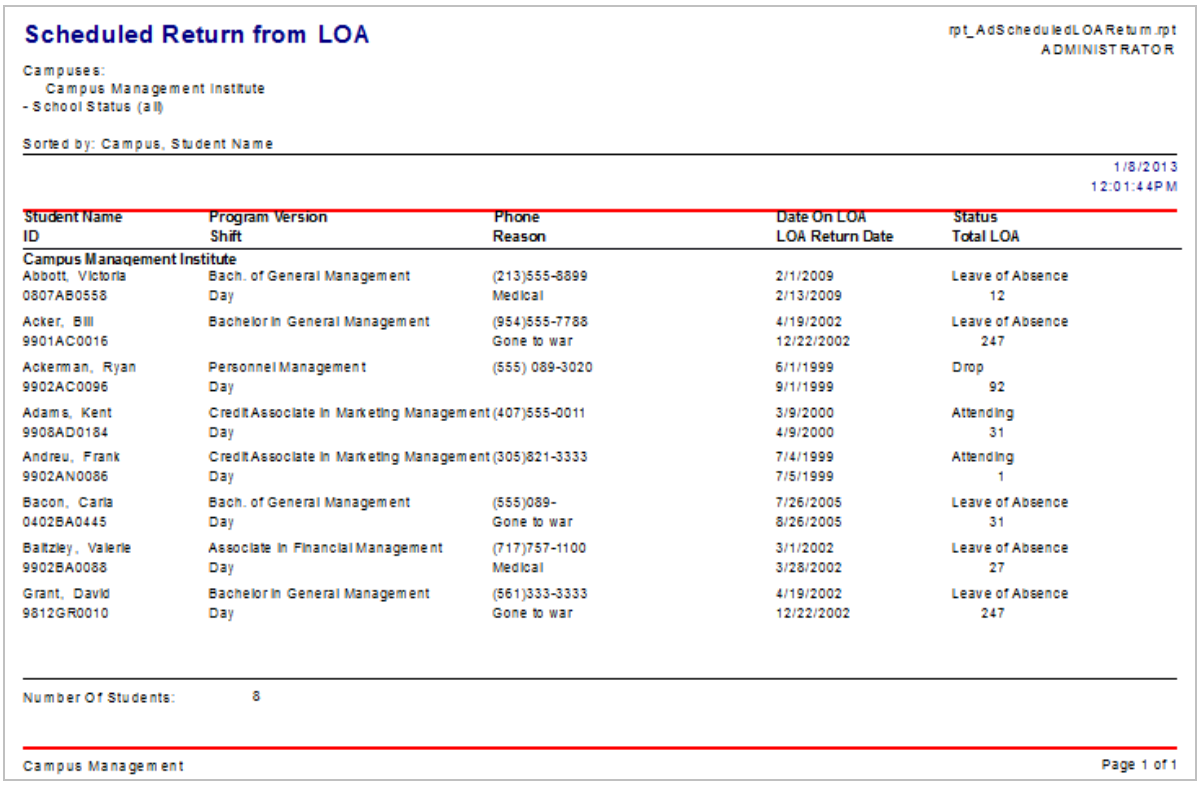
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Student ID
   - Program Version
   - Shift
   - Student Phone

- Reason
- Date on LOA
- LOA Return Date
- Status
- Total LOA

A count of students listed is provided at the end of the report.



Scheduled Return from LOA

rpt_AdScheduledLOAReturn.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- School Status (all)

Sorted by: Campus, Student Name

1/8/2013
12:01:44PM

Student Name / ID	Program Version / Shift	Phone / Reason	Date On LOA / LOA Return Date	Status / Total LOA
Campus Management Institute				
Abbott, Victoria 0807AB0558	Bach. of General Management Day	(213)555-8899 Medical	2/1/2009 2/13/2009	Leave of Absence 12
Acker, Bill 9901AC0016	Bachelor in General Management	(954)555-7788 Gone to war	4/19/2002 12/22/2002	Leave of Absence 247
Ackerman, Ryan 9902AC0096	Personnel Management Day	(555) 089-3020	6/1/1999 9/1/1999	Drop 92
Adams, Kent 9908AD0184	Credit Associate in Marketing Management Day	(407)555-0011	3/9/2000 4/9/2000	Attending 31
Andreu, Frank 9902AN0086	Credit Associate in Marketing Management Day	(305)821-3333	7/4/1999 7/5/1999	Attending 1
Bacon, Carla 0402BA0445	Bach. of General Management Day	(555)089- Gone to war	7/26/2005 8/26/2005	Leave of Absence 31
Baltzley, Valerie 9902BA0088	Associate in Financial Management Day	(717)757-1100 Medical	3/1/2002 3/28/2002	Leave of Absence 27
Grant, David 9812GR0010	Bachelor in General Management Day	(561)333-3333 Gone to war	4/19/2002 12/22/2002	Leave of Absence 247

Number Of Students: 8

Campus Management

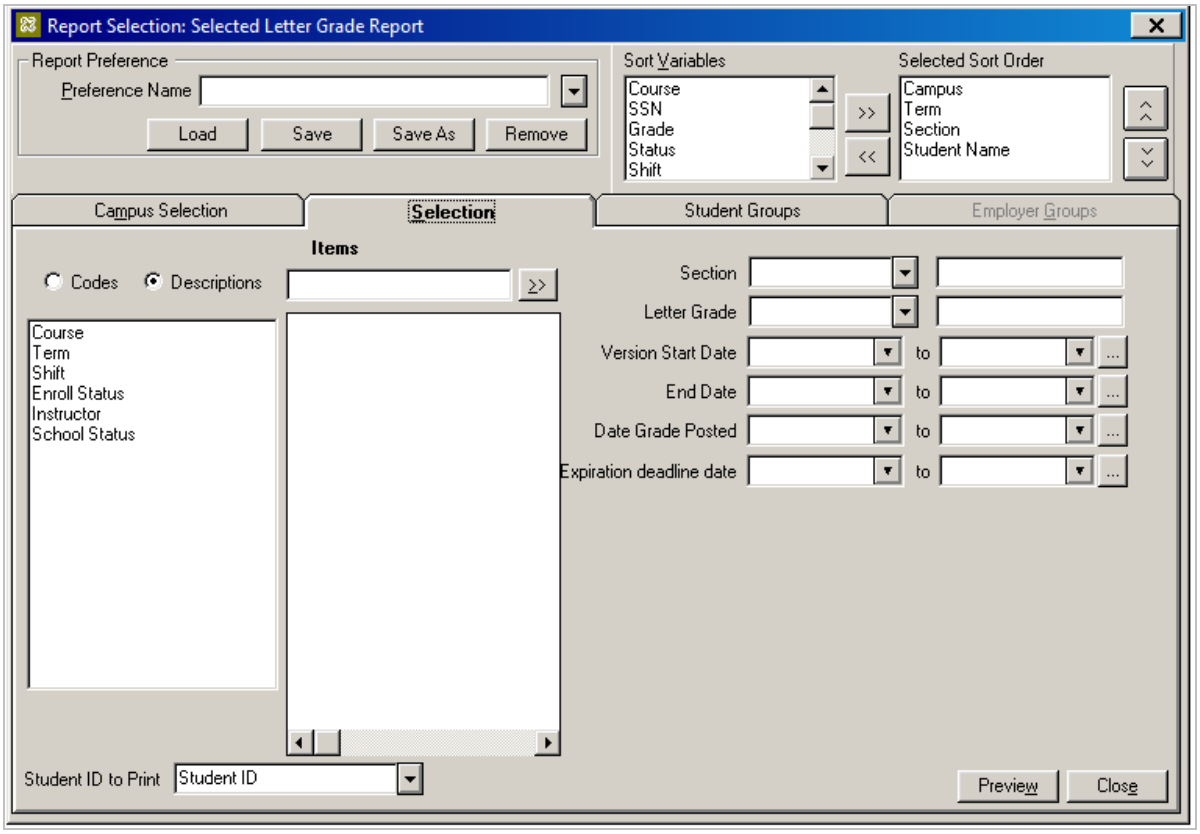
Page 1 of 1

Selected Letter Grade Report

This report gives you the ability to look at student grade records by selecting a given letter grade.

To run the report:

1. Navigate to **Reports > Academic Records > Selected Letter Grade Report**. The Report Selection: Selected Letter Grade Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

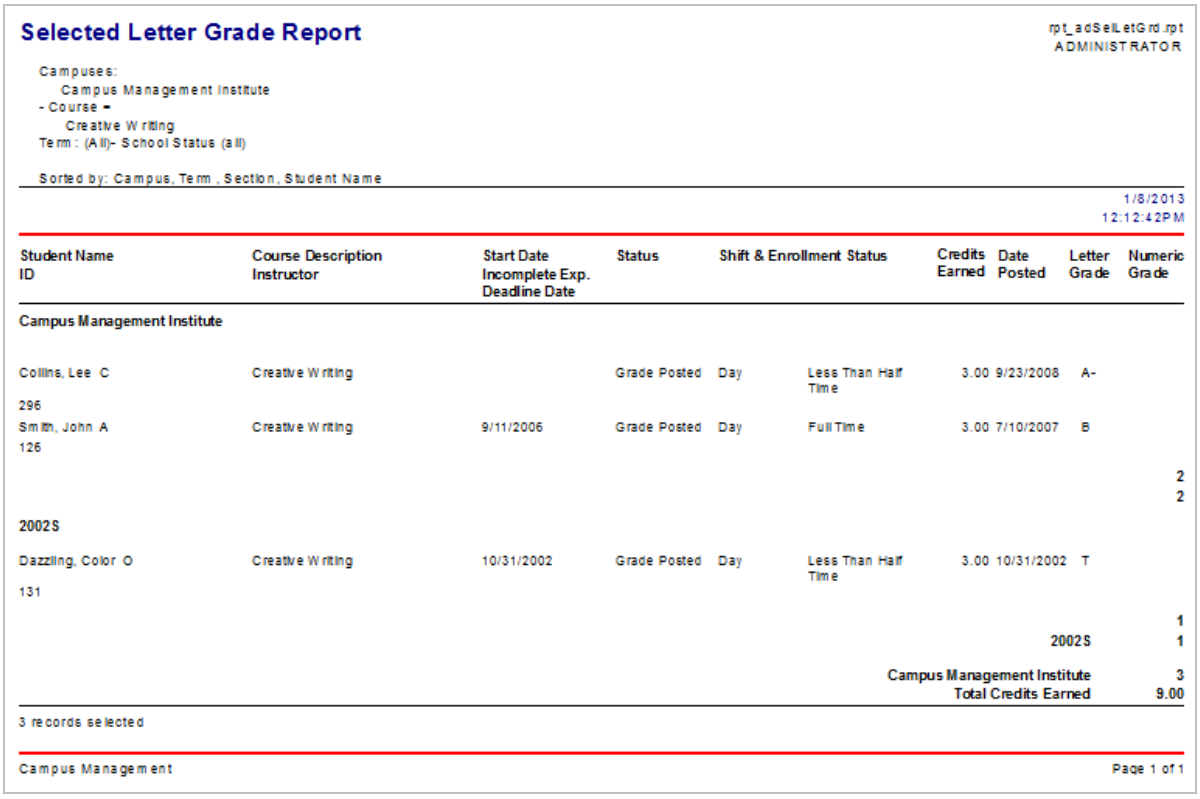
   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Student ID
   - Course Description
   - Instructor
   - Start Date
   - Incomplete Exp. Deadline Date

- Status
- Shift
- Enrollment Status
- Credits Earned
- Date Posted
- Letter Grade
- Numeric Grade



Selected Letter Grade Report

rpt_adSelLetGrd.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- Course -
Creative Writing
Term: (All)- School Status (all)

Sorted by: Campus, Term, Section, Student Name

1/8/2013
12:12:42PM

Student Name ID	Course Description Instructor	Start Date Incomplete Exp. Deadline Date	Status	Shift & Enrollment Status		Credits Earned	Date Posted	Letter Grade	Numeric Grade
Campus Management Institute									
Collins, Lee C 296	Creative Writing		Grade Posted	Day	Less Than Half Time	3.00	9/23/2008	A-	
Smith, John A 126	Creative Writing	9/11/2006	Grade Posted	Day	Full Time	3.00	7/10/2007	B	
									2
									2
2002S									
Dazzling, Color O 131	Creative Writing	10/31/2002	Grade Posted	Day	Less Than Half Time	3.00	10/31/2002	T	
									1
								2002S	**1**
					Campus Management Institute				**3**
					Total Credits Earned				**9.00**

3 records selected

Campus Management

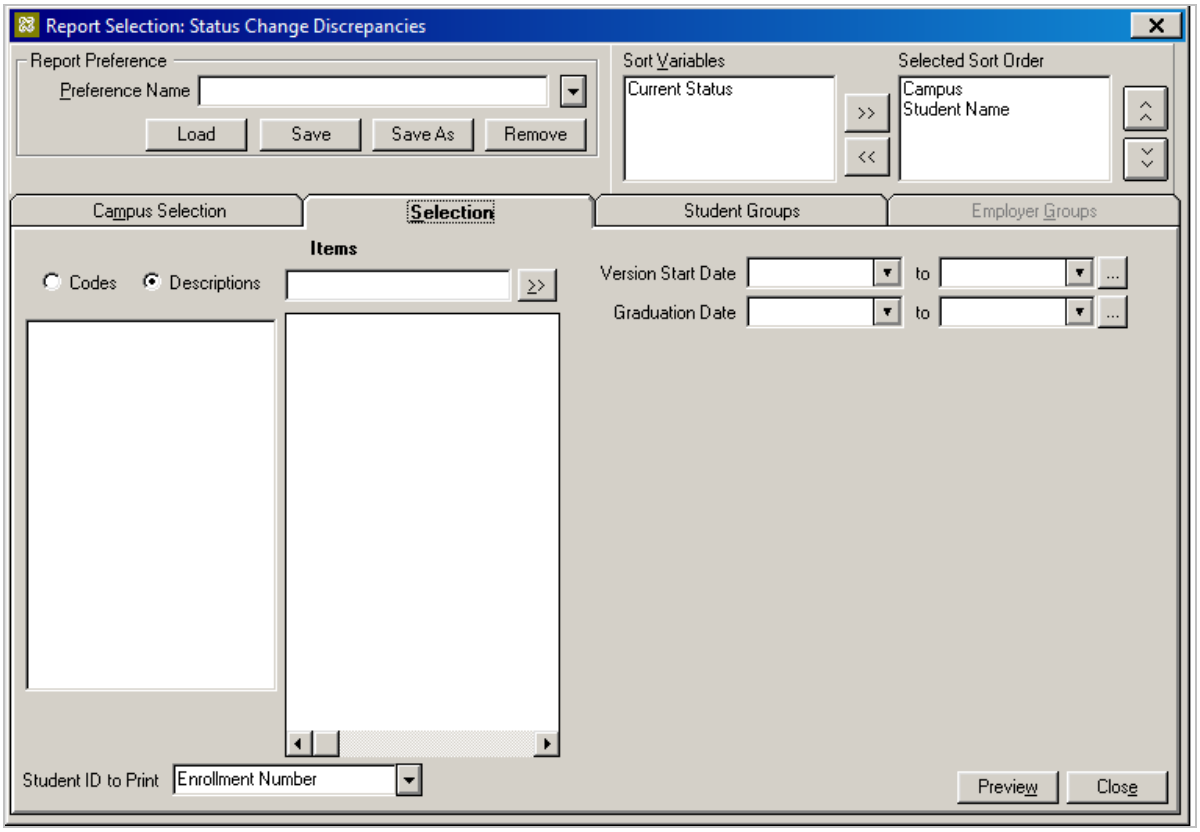
Page 1 of 1

Status Change Discrepancies

This report lists students that have a calculated status which does not match the current status.

To run the report:

1. Navigate to **Reports > Academic Records > Status Change Discrepancies**. The Report Selection: Status Change Discrepancies form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

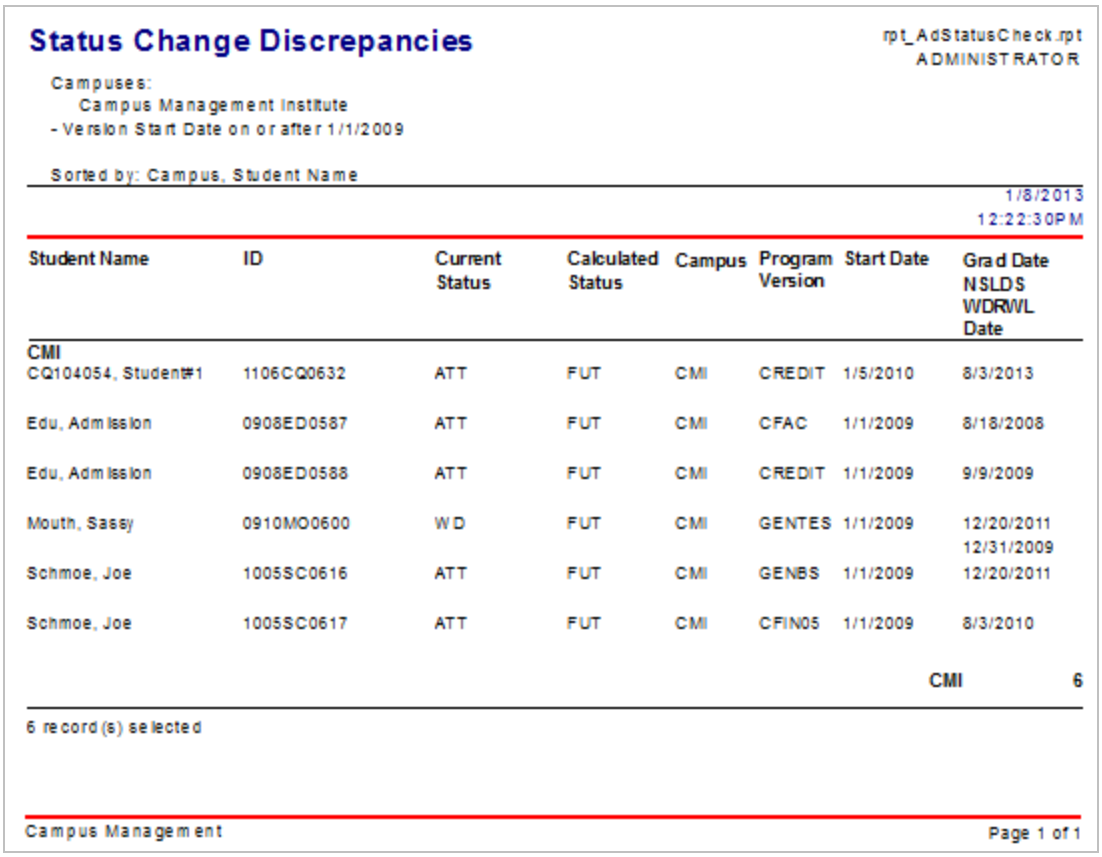
   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Student ID
   - Current Status
   - Calculated Status
   - Campus
   - Program Version

- Start Date
- Graduation Date
- NSLDS Withdrawal Date



Status Change Discrepancies

rpt_AdStatusCheck.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- Version Start Date on or after 1/1/2009

Sorted by: Campus, Student Name

1/8/2013
12:22:30PM

Student Name	ID	Current Status	Calculated Status	Campus	Program Version	Start Date	Grad Date NSLDS WDRWL Date
CMI							
CQ104054, Student#1	1106CQ0632	ATT	FUT	CMI	CREDIT	1/5/2010	8/3/2013
Edu, Admission	0908ED0587	ATT	FUT	CMI	CFAC	1/1/2009	8/18/2008
Edu, Admission	0908ED0588	ATT	FUT	CMI	CREDIT	1/1/2009	9/9/2009
Mouth, Sassy	0910MO0600	WD	FUT	CMI	GENTES	1/1/2009	12/20/2011 12/31/2009
Schmoe, Joe	1005SC0616	ATT	FUT	CMI	GENBS	1/1/2009	12/20/2011
Schmoe, Joe	1005SC0617	ATT	FUT	CMI	CFIN05	1/1/2009	8/3/2010
						CMI	6

6 record(s) selected

Campus Management

Page 1 of 1

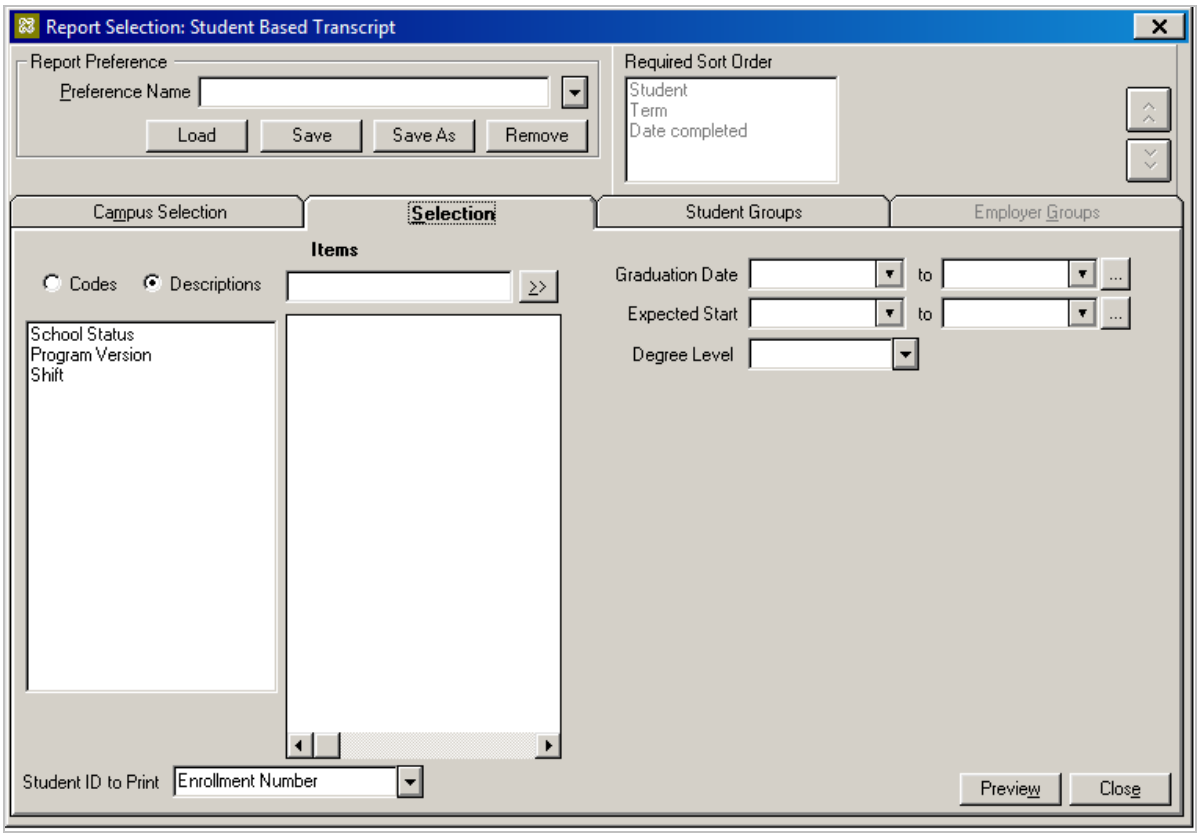
Student Based Transcript

This report provides student based transcripts. The report list courses for all student enrollments grouped by term code in chronological order by term start date. Enrollment and degree information is displayed at the end of the report. The GPA, Credits, and Hours for courses taken in the same term but at different schools are added up and presented as a single set of totals for the term.

Note: To configure the transcript format, navigate to **Setup > Academic Records > Academic Records Settings >** Transcripts tab.

To run the report:

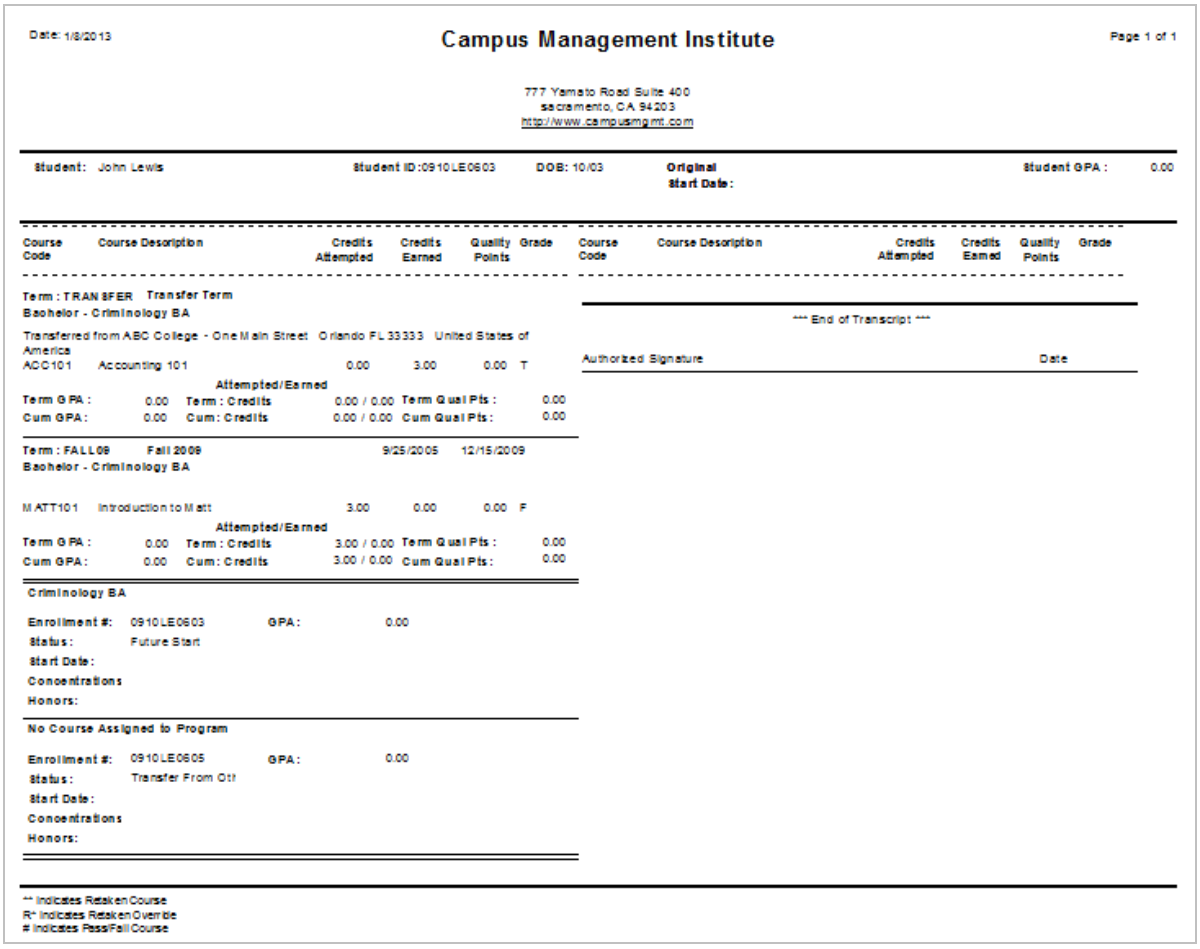
1. Navigate to **Reports > Academic Records > Student Based Transcript**. The Report Selection: Student Based Transcript form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.



Date: 1/8/2013

Campus Management Institute

Page 1 of 1

777 Yamato Road Suite 400
sacramento, CA 94203
http://www.campusmgmt.com

Student: John Lewis **Student ID:** 0910LE0603 **DOB:** 10/03 **Original Start Date:** **Student GPA :** 0.00

Course Code	Course Description	Credits Attempted	Credits Earned	Quality Points	Grade
Term : TRANSFER	**Transfer Term**				
Bachelor - Criminology BA					
Transferred from ABC College - One Main Street Orlando FL 33333 United States of America					
ACC101	Accounting 101	0.00	3.00	0.00	T
	Attempted/Earned				
Term GPA : 0.00	**Term : Credits**	0.00 / 0.00	**Term Qual Pts :**	0.00	
Cum GPA : 0.00	**Cum : Credits**	0.00 / 0.00	**Cum Qual Pts :**	0.00	
Term : FALL09	**Fall 2009**	9/25/2005	12/15/2009		
Bachelor - Criminology BA					
MATT101	Introduction to Matt	3.00	0.00	0.00	F
	Attempted/Earned				
Term GPA : 0.00	**Term : Credits**	3.00 / 0.00	**Term Qual Pts :**	0.00	
Cum GPA : 0.00	**Cum : Credits**	3.00 / 0.00	**Cum Qual Pts :**	0.00	

Criminology BA

Enrollment #: 0910LE0603 **GPA:** 0.00
Status: Future Start
Start Date:
Concentrations
Honors:

No Course Assigned to Program

Enrollment #: 0910LE0605 **GPA:** 0.00
Status: Transfer From Ot
Start Date:
Concentrations
Honors:

*** End of Transcript ***

Authorized Signature Date

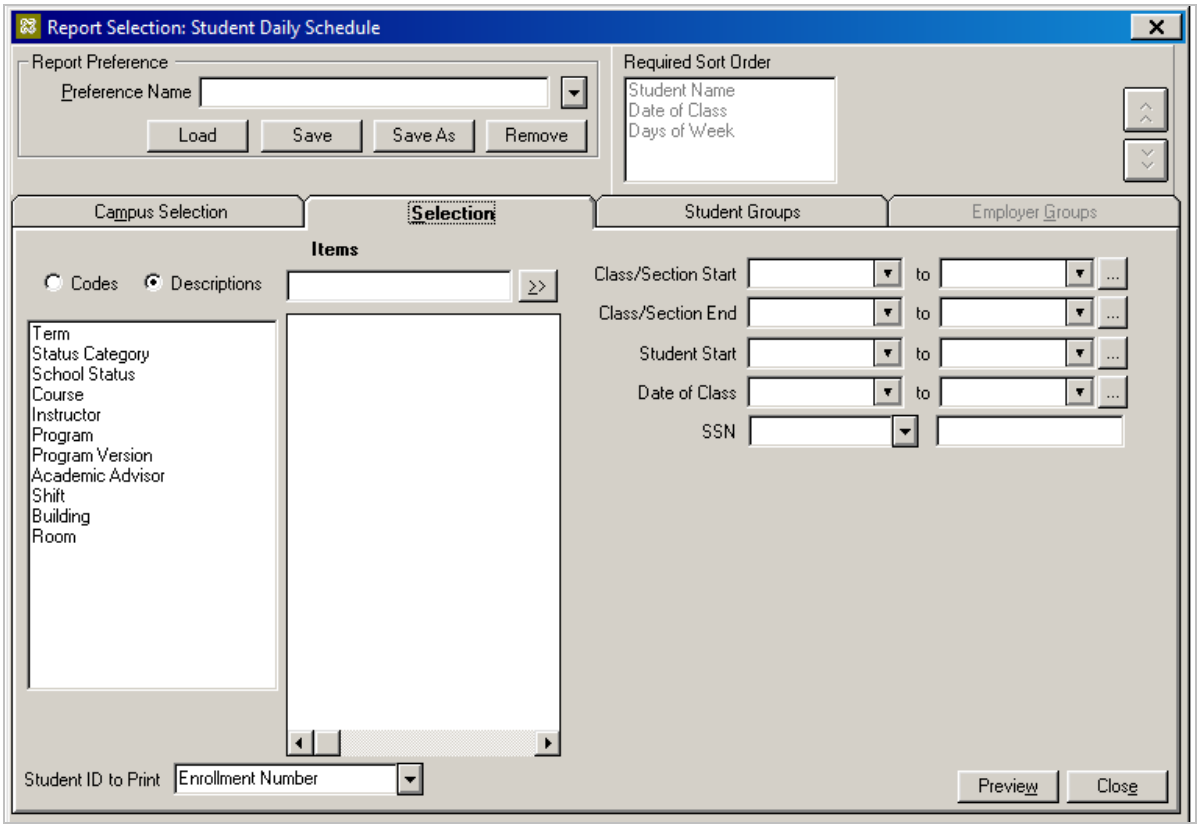
** Indicates Retaken Course
R* Indicates Retaken Override
# Indicates Pass/Fail Course

Student Daily Schedule

This report displays the daily schedule of a student comprising various class schedules planned on a particular day of the week.

To run the report:

1. Navigate to **Reports > Academic Records > Student Daily Schedule**. The Report Selection: Student Daily Schedule form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

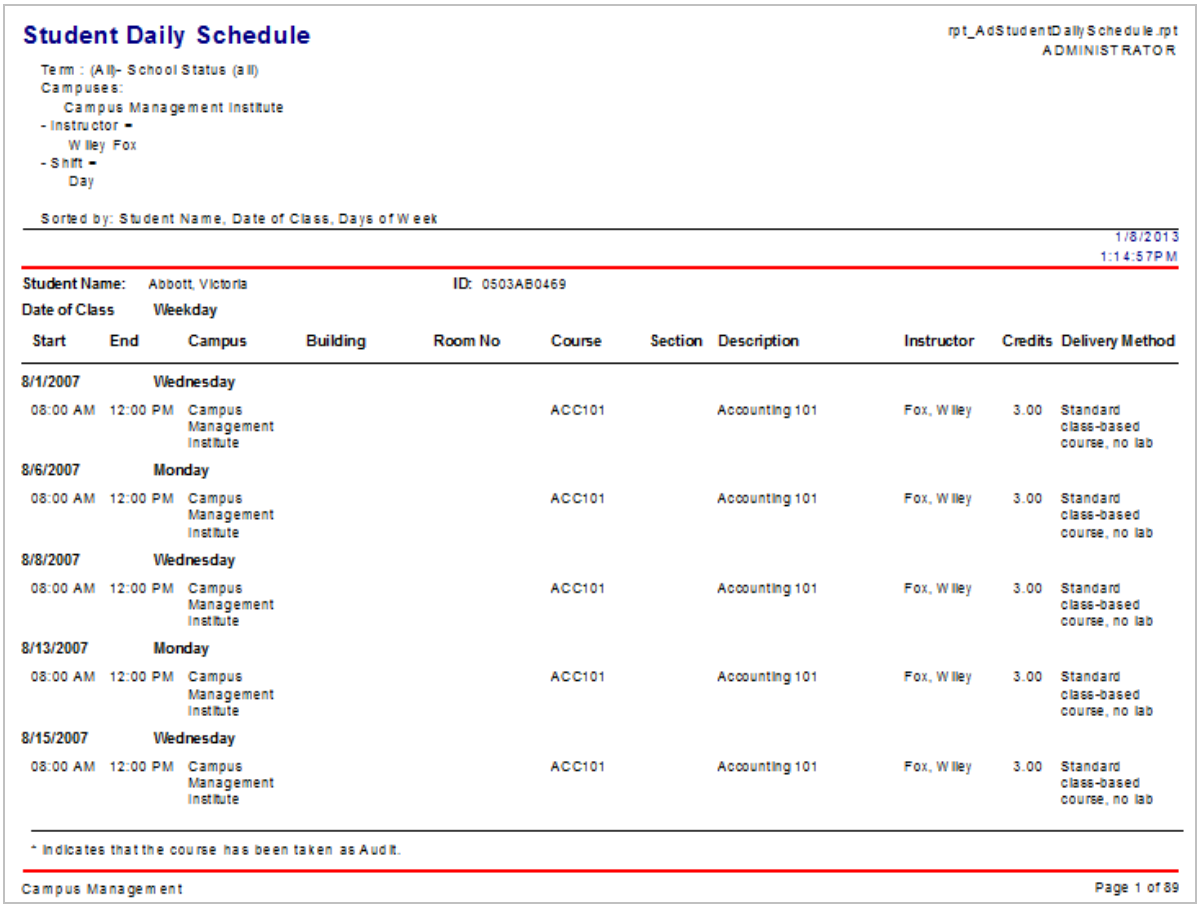
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Weekday
   - Start and End time of the periods
   - Building
   - Room Number
   - Course Code
   - Section Code
   - Description of the Class

- Instructor
- Credits
- Delivery Method

A note is displayed if the student has elected to take a class on a pass/fail basis.



Student Daily Schedule

rpt_AdStudentDailySchedule.rpt
ADMINISTRATOR

Term : (All)- School Status (all)
Campuses:
Campus Management Institute
- Instructor -
Wiley Fox
- Shift -
Day

Sorted by: Student Name, Date of Class, Days of Week

1/8/2013
1:14:57PM

Student Name: Abbott, Victoria **ID:** 0503AB0469

Date of Class **Weekday**

Start	End	Campus	Building	Room No	Course	Section	Description	Instructor	Credits	Delivery Method
8/1/2007		**Wednesday**								
08:00 AM	12:00 PM	Campus Management Institute			ACC101		Accounting 101	Fox, Wiley	3.00	Standard class-based course, no lab
8/6/2007		**Monday**								
08:00 AM	12:00 PM	Campus Management Institute			ACC101		Accounting 101	Fox, Wiley	3.00	Standard class-based course, no lab
8/8/2007		**Wednesday**								
08:00 AM	12:00 PM	Campus Management Institute			ACC101		Accounting 101	Fox, Wiley	3.00	Standard class-based course, no lab
8/13/2007		**Monday**								
08:00 AM	12:00 PM	Campus Management Institute			ACC101		Accounting 101	Fox, Wiley	3.00	Standard class-based course, no lab
8/15/2007		**Wednesday**								
08:00 AM	12:00 PM	Campus Management Institute			ACC101		Accounting 101	Fox, Wiley	3.00	Standard class-based course, no lab

* Indicates that the course has been taken as Audit.

Campus Management Page 1 of 89

Student Degree Evaluation Report

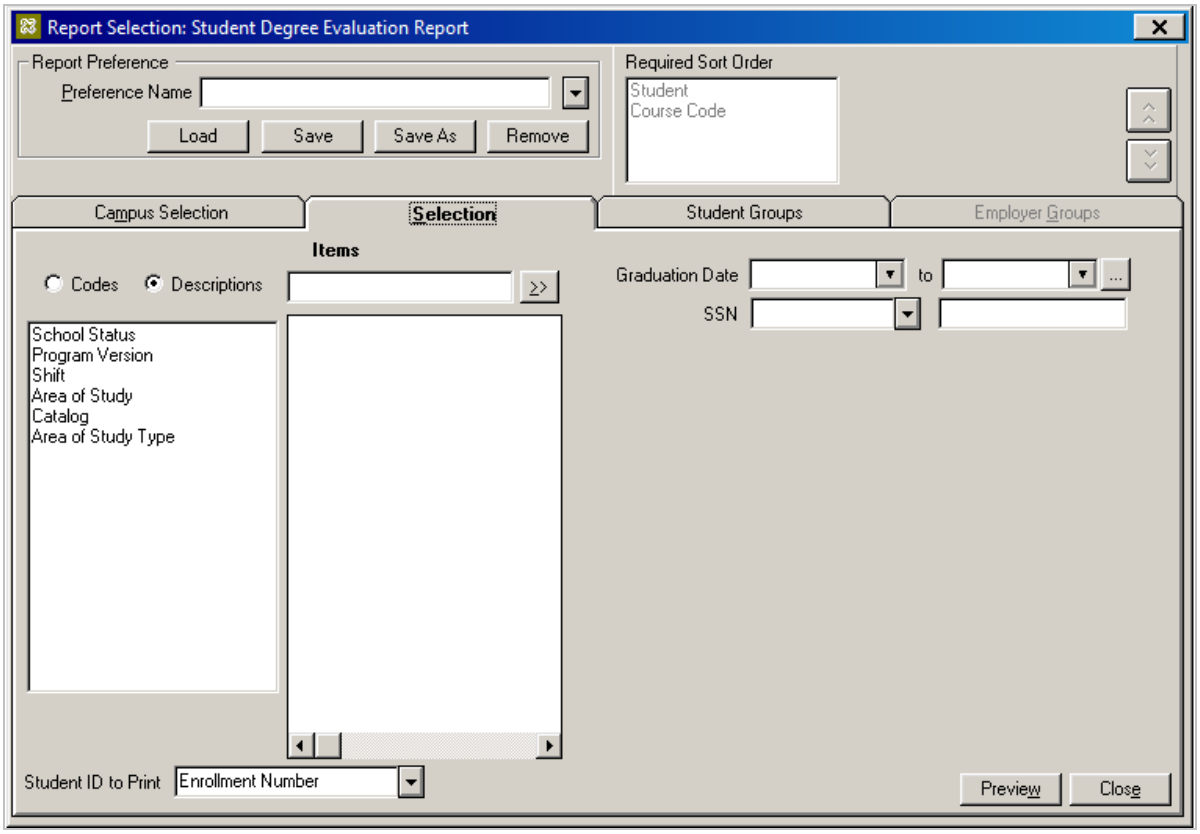
The Degree Evaluation Report report lists all courses taken by the student.

Note: A different report, the Degree Progress Audit, can be obtained from **View > Academic Records >** Degree Progress Audit. The Degree Progress Audit lists only courses relevant to the degree.

To run the report:

1. Navigate to **Reports > Academic Records > Student Degree Evaluation Report**. The Report Selection: Student Degree Evaluation Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Note: You can use the student's SSN to obtain the report for a single student.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

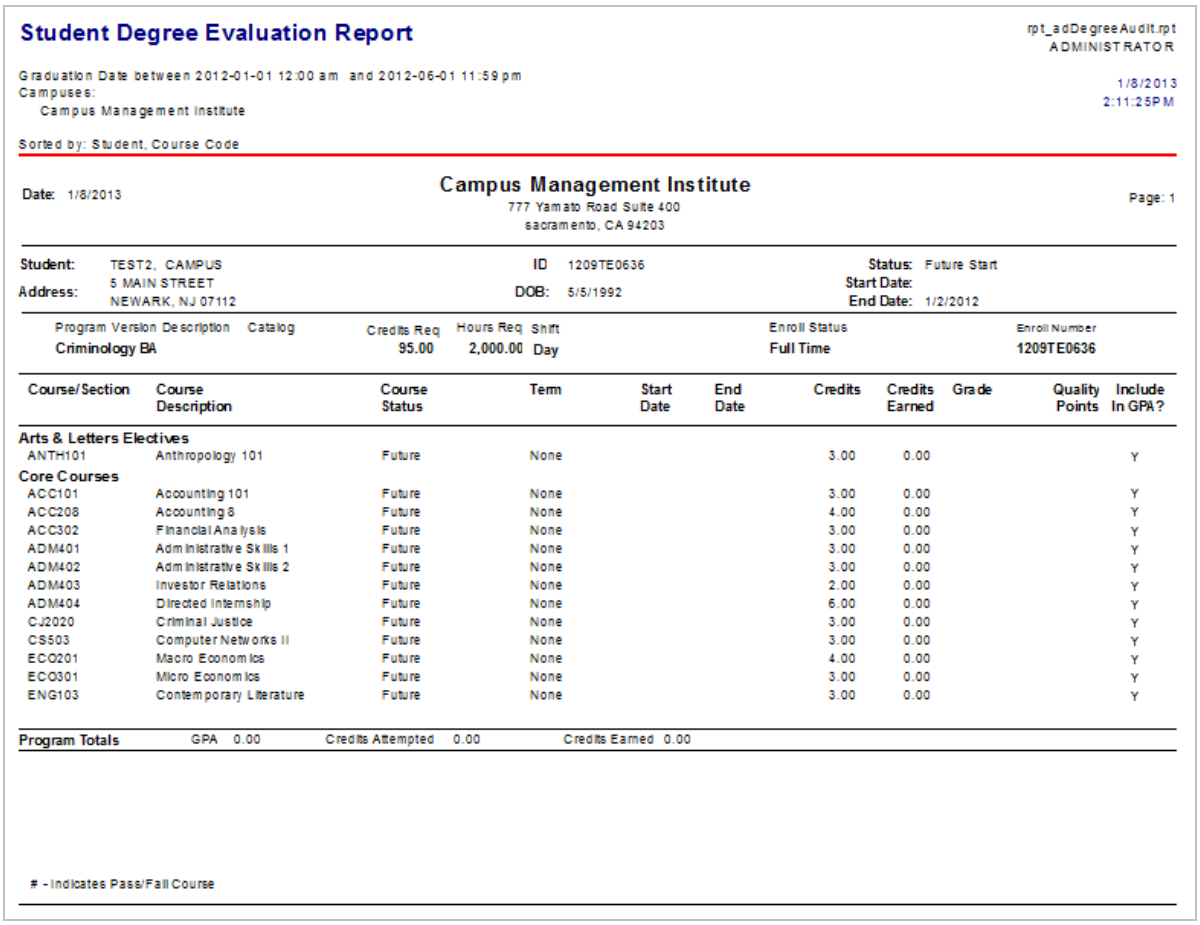
   The group header for a student includes student name and address, SSN, date of birth (DOB), school status, start date, and end date.

   Program data includes the description, credits required, hours required, shift, and enrollment status.

Detail lines include course code, section, course description, course status, term, start date, end date, credits, credits earned, grade, quality points, and "include in GPA" indicator.

Totals for each student include the GPA, credits attempted, credits earned, and catalog.

A note is displayed if the student has elected to take a class on a pass/fail basis. The letter grade reflects the pass/-fail grade scale in these instances.



Student Degree Evaluation Report

rpt_adDegreeAudit.rpt
ADMINISTRATOR

Graduation Date between 2012-01-01 12:00 am and 2012-06-01 11:59 pm
Campuses:
Campus Management Institute

1/8/2013
2:11:25PM

Sorted by: Student, Course Code

Date: 1/8/2013

Campus Management Institute
777 Yamato Road Suite 400
sacramento, CA 94203

Page: 1

Student: TEST2, CAMPUS
Address: 5 MAIN STREET
NEWARK, NJ 07112

ID 1209TE0636
DOB: 5/5/1992

Status: Future Start
Start Date:
End Date: 1/2/2012

Program Version Description	Catalog	Credits Req	Hours Req	Shift	Enroll Status	Enroll Number
Criminology BA		95.00	2,000.00	Day	Full Time	1209TE0636

Course/Section	Course Description	Course Status	Term	Start Date	End Date	Credits	Credits Earned	Grade	Quality Points	Include In GPA?
Arts & Letters Electives										
ANTH101	Anthropology 101	Future	None			3.00	0.00			Y
Core Courses										
ACC101	Accounting 101	Future	None			3.00	0.00			Y
ACC208	Accounting 8	Future	None			4.00	0.00			Y
ACC302	Financial Analysis	Future	None			3.00	0.00			Y
ADM401	Administrative Skills 1	Future	None			3.00	0.00			Y
ADM402	Administrative Skills 2	Future	None			3.00	0.00			Y
ADM403	Investor Relations	Future	None			2.00	0.00			Y
ADM404	Directed Internship	Future	None			6.00	0.00			Y
CJ2020	Criminal Justice	Future	None			3.00	0.00			Y
CS503	Computer Networks II	Future	None			3.00	0.00			Y
ECO201	Macro Economics	Future	None			4.00	0.00			Y
ECO301	Micro Economics	Future	None			3.00	0.00			Y
ENG103	Contemporary Literature	Future	None			3.00	0.00			Y

Program Totals GPA 0.00 Credits Attempted 0.00 Credits Earned 0.00

- Indicates Pass/Fail Course

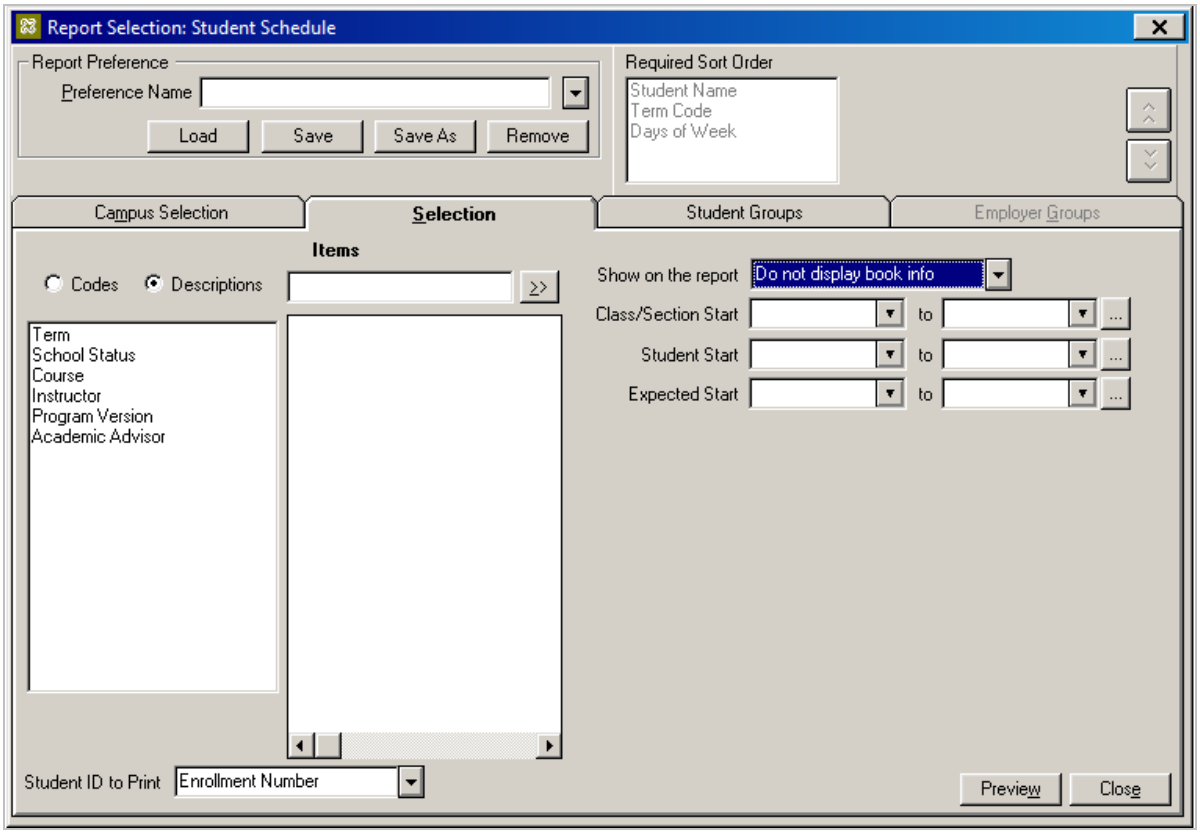
Student Schedule

This report lists class section schedules for students.

This report can be run from the Reports menu for multiple students (page breaks separate the schedules for each student) or from the View > Academic Records > Schedule > Print option for a selected student.

To run the report:

1. Navigate to **Reports > Academic Records > Student Schedule**. The Report Selection: Student Schedule form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

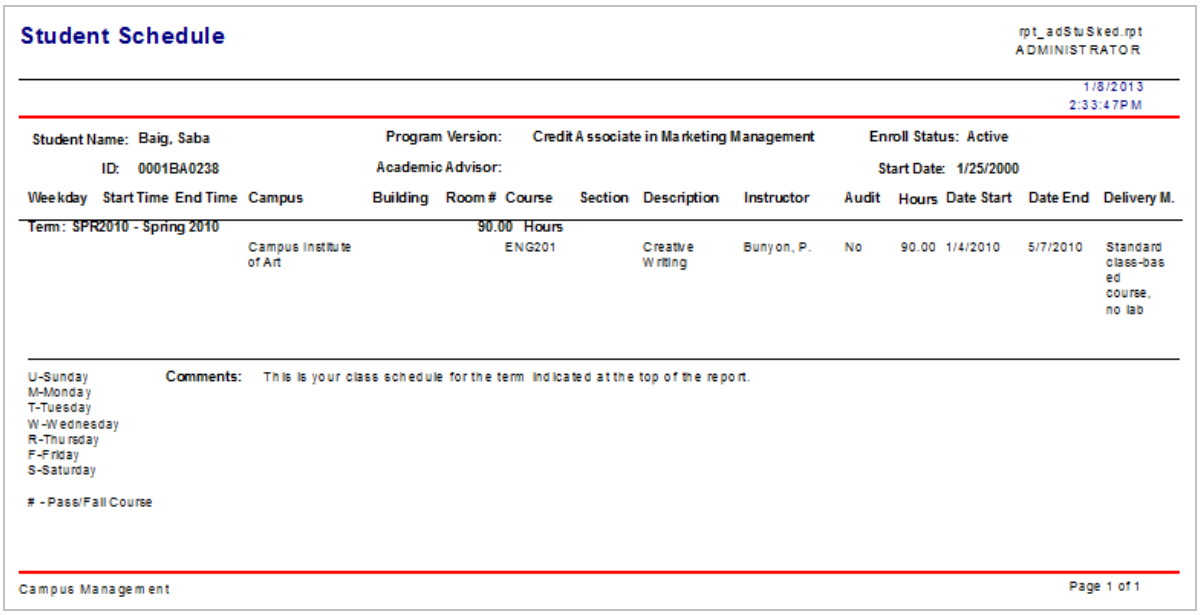
   The report displays the following details:

   - Student Name
   - Student ID
   - Weekday
   - Start Time

- End Time
- Campus
- Program Version
- Academic Advisor
- Building
- Room Number
- Course
- Section
- Description
- Instructor
- Enrollment Status
- Start Date
- Audit
- Hours or Credits
  If the Academic Calendar code used in the program version setup is 5 - Clock Hours, the column heading is Hours. Otherwise, the heading is Credits.
- Date Start
- Date End
- Delivery Method
- Comments
  The report includes comments that have been entered for individual class sections. These comments are in addition to the comments that can be entered for all student schedules on the Setup > Campus Locations > Academic Records tab.

If applicable, the report includes Dependent class sections scheduled for a student.

A note is displayed if the student has elected to take a class on a pass/fail basis.



Student Schedule

rpt_adStuSked.rpt
ADMINISTRATOR

1/8/2013
2:33:47PM

Student Name: Baig, Saba — Program Version: Credit Associate in Marketing Management — Enroll Status: Active

ID: 0001BA0238 — Academic Advisor: — Start Date: 1/25/2000

Weekday	Start Time	End Time	Campus	Building	Room #	Course	Section	Description	Instructor	Audit	Hours	Date Start	Date End	Delivery M.
Term: SPR2010 - Spring 2010					90.00 Hours									
			Campus Institute of Art			ENG201		Creative Writing	Bunyon, P.	No	90.00	1/4/2010	5/7/2010	Standard class-based course, no lab

U-Sunday
M-Monday
T-Tuesday
W-Wednesday
R-Thursday
F-Friday
S-Saturday

- Pass/Fail Course

Comments: This is your class schedule for the term indicated at the top of the report.

Campus Management — Page 1 of 1

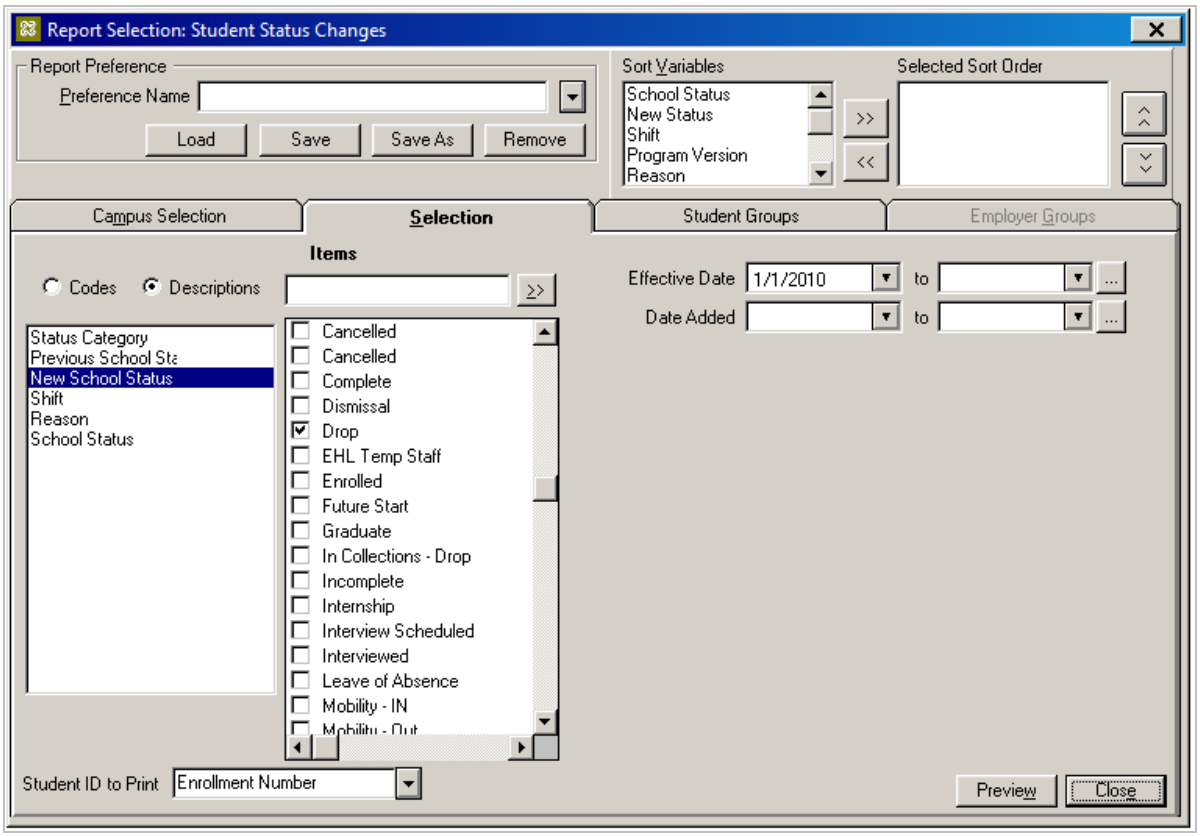
Student Status Changes

This report is a history of Admissions and Enrollment status changes by student. The status change records included in this report are those in which the status category codes are Active (A), Enrollment (E), Never Attended (N), Permanent Out (P), and Temporary Out (T). Lead and Placement statuses are not included.

To run the report:

1. Navigate to **Reports > Academic Records > Student Status Changes**. The Report Selection: Student Status Changes form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Note: If you select a value of **Drop** in the New School Status or School Status selection, the effective date range will be applied for Drop status records using the NSLDS withdrawal date.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

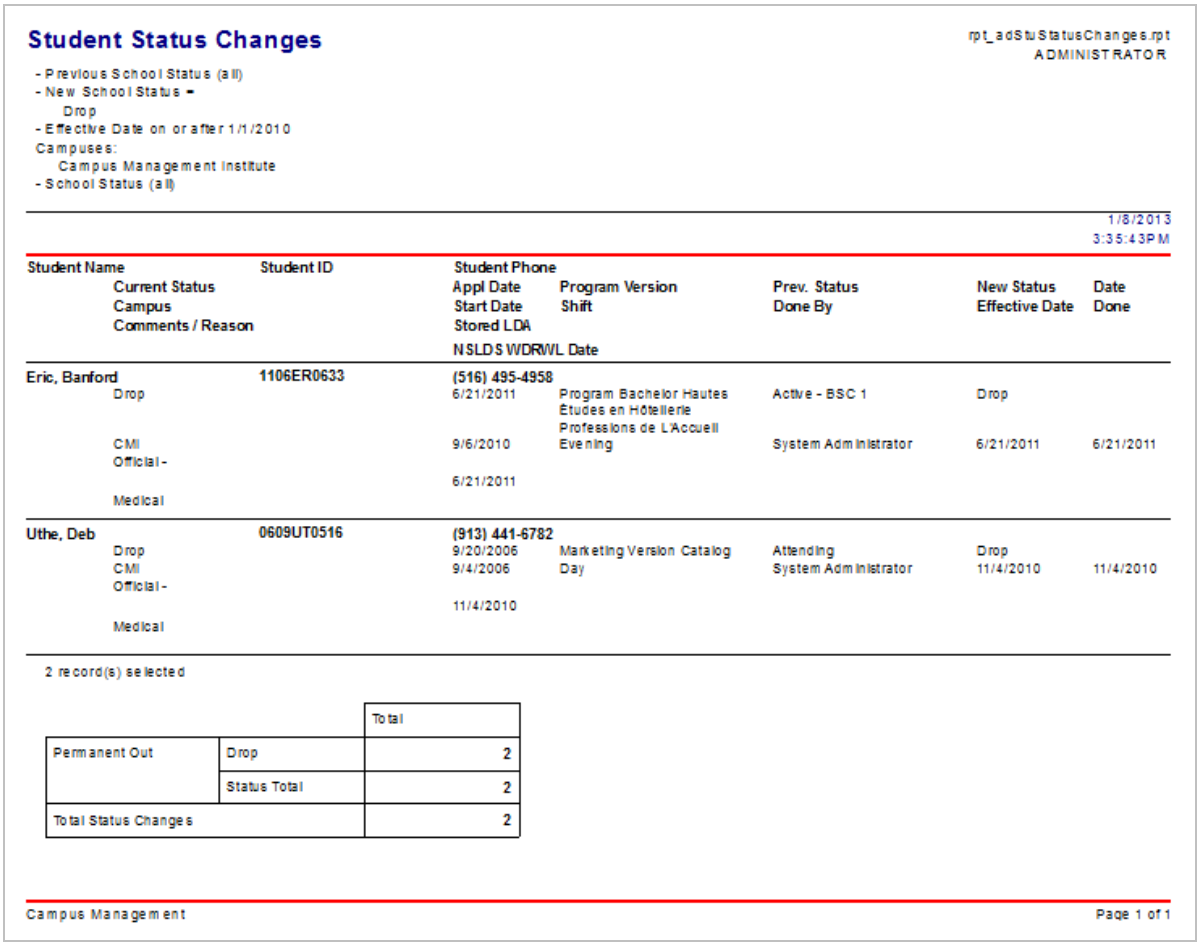
   The report displays the following details:

   - Student Name
   - Student ID

- Student's Phone Number
- Application Date
- Start Date
- Stored Last Date of Attendance (LDA)
- NSLDS Withdrawal Date
- Program Version
- Shift
- Current Status
- Previous Status
- New Status
- Comments/Reason
- Date Done
- Done By

The Excel output includes the student's address (street address, city, state, country, and postal code) and home phone number.

The total number of status changes is listed at the end of the report.



Student Status Changes

rpt_adStuStatusChanges.rpt
ADMINISTRATOR

- Previous School Status (all)
- New School Status =
  Drop
- Effective Date on or after 1/1/2010

Campuses:
Campus Management Institute

- School Status (all)

1/8/2013
3:35:43PM

Student Name / Current Status / Campus / Comments / Reason	Student ID	Student Phone / Appl Date / Start Date / Stored LDA / NSLDS WDRWL Date	Program Version / Shift	Prev. Status / Done By	New Status / Effective Date	Date Done
Eric, Banford	**1106ER0633**	**(516) 495-4958**				
Drop		6/21/2011	Program Bachelor Hautes Études en Hôtellerie Professions de L'Accueil	Active - BSC 1	Drop	
CMI		9/6/2010	Evening	System Administrator	6/21/2011	6/21/2011
Official - Medical		6/21/2011				
Uthe, Deb	**0609UT0516**	**(913) 441-6782**				
Drop		9/20/2006	Marketing Version Catalog	Attending	Drop	
CMI		9/4/2006	Day	System Administrator	11/4/2010	11/4/2010
Official - Medical		11/4/2010				

2 record(s) selected

		Total
Permanent Out	Drop	2
	Status Total	2
Total Status Changes		2

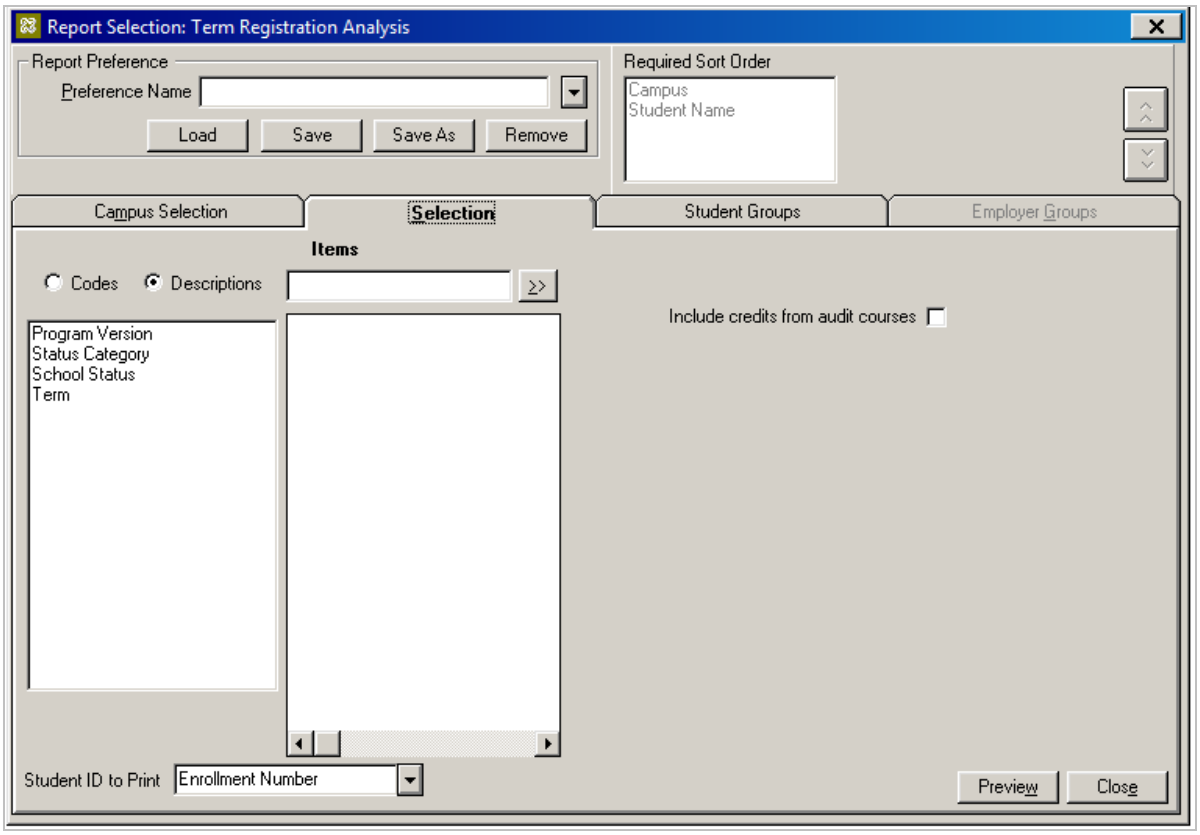
Campus Management
Page 1 of 1

Term Registration Analysis

The purpose of this report is to determine who is currently registered in one term but is not registered in another term and to show a side-by-side comparison report.

To run the report:

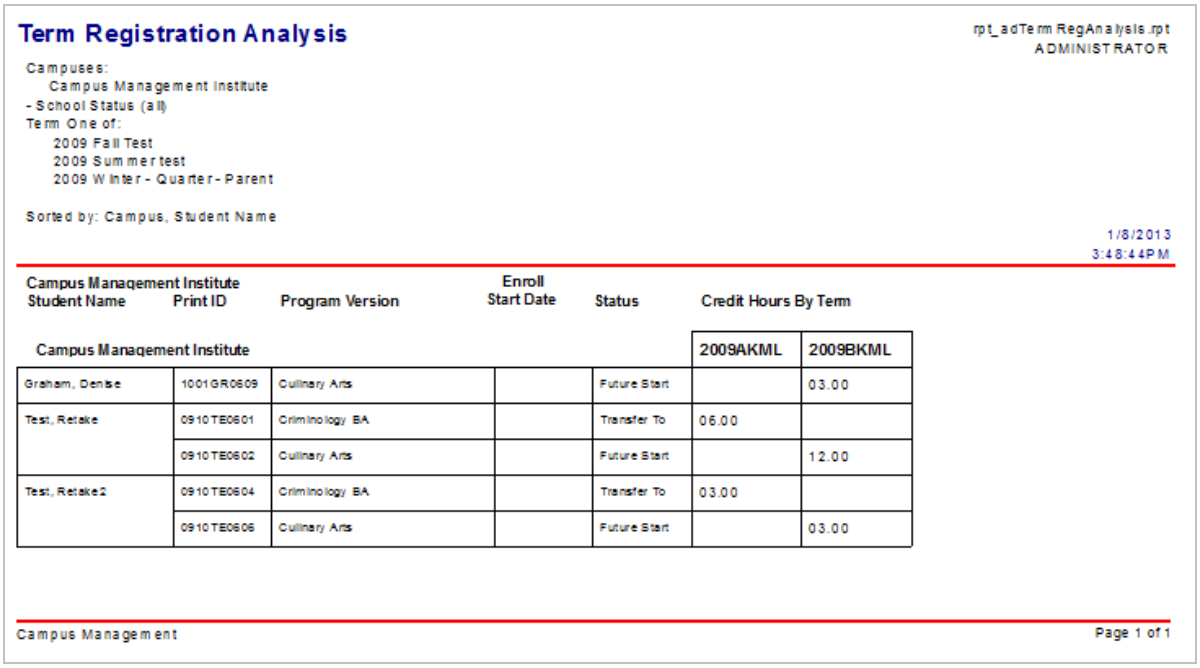
1. Navigate to **Reports > Academic Records > Term Registration Analysis**. The Report Selection: Term Registration Analysis form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.



Term Registration Analysis

rpt_adTermRegAnalysis.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- School Status (all)
Term One of:
2009 Fall Test
2009 Summer test
2009 Winter - Quarter - Parent

Sorted by: Campus, Student Name

1/8/2013
3:48:44PM

Campus Management Institute Student Name	Print ID	Program Version	Enroll Start Date	Status	Credit Hours By Term	
Campus Management Institute					**2009AKML**	**2009BKML**
Graham, Denise	1001GR0609	Culinary Arts		Future Start		03.00
Test, Retake	0910TE0601	Criminology BA		Transfer To	06.00	
	0910TE0602	Culinary Arts		Future Start		12.00
Test, Retake2	0910TE0604	Criminology BA		Transfer To	03.00	
	0910TE0606	Culinary Arts		Future Start		03.00

Campus Management

Page 1 of 1

Term Relationship

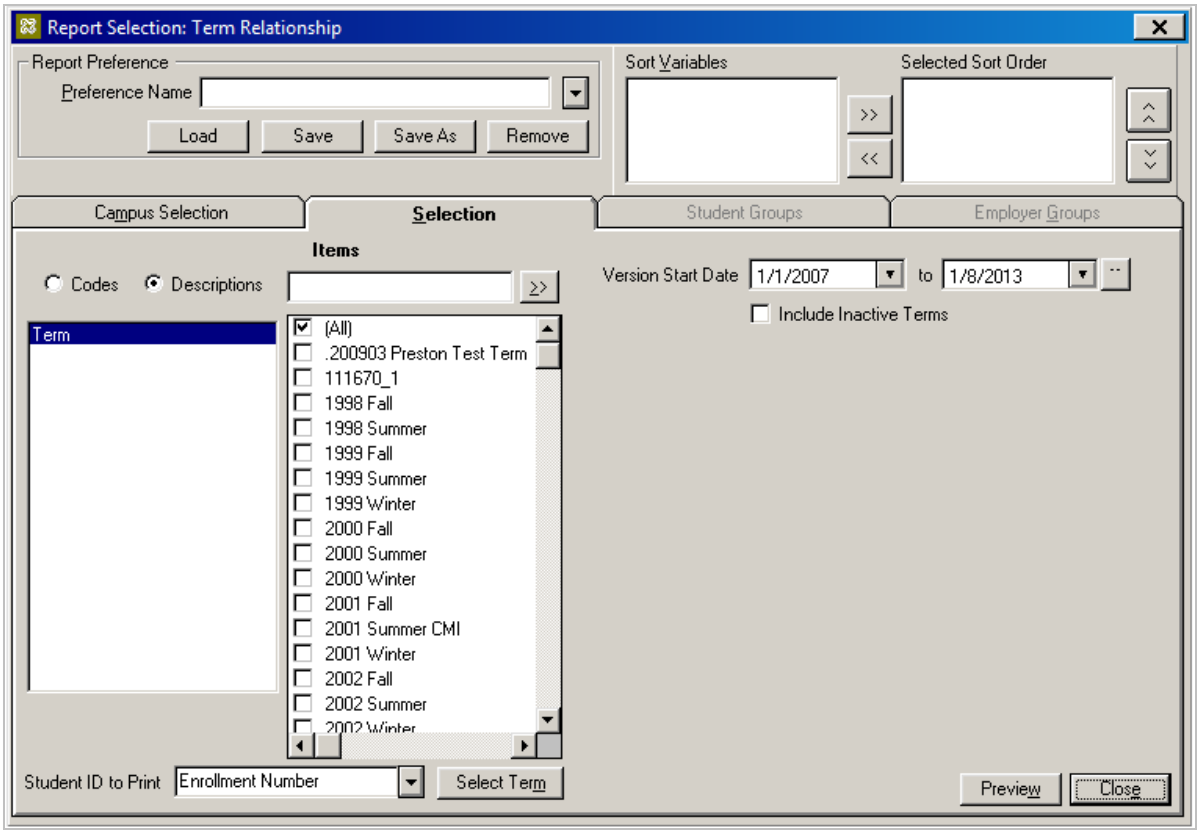
This report displays a family of terms as a Parent Term plus at least one non-reporting Child Term. The report identifies child terms that are associated with families that do not carry a complete representation of term usages (Financial Aid, Student Accounts, and Registration/Attendance).

The information presented on the report contains terms where:

a. The Child Term belongs to one of the Campuses being reported and
b. The Parent Term starts within the Version Start Date Range selected by the user.

To run the report:

1. Navigate to **Reports > Academic Records > Term Relationship**. The Report Selection: Term Relationship form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

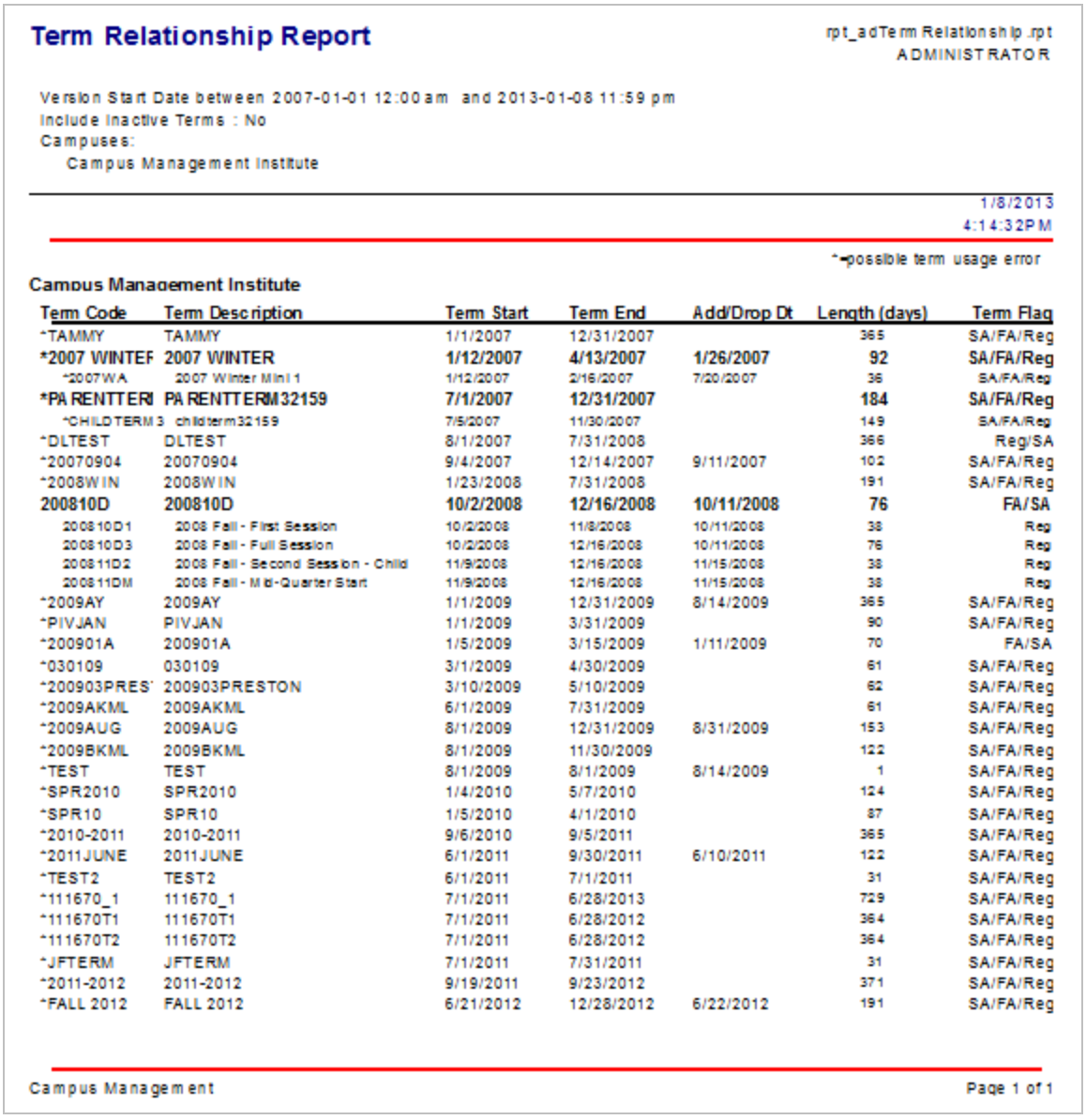


4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report results is grouped and sorted by all Parent Terms associated with the selected Child Terms.

   For each term, the term code, term description, term start date, term end date, term add/drop date, term length, and term flag (usage) are displayed.

Terms that are considered to be orphaned are marked with an asterisk.



Term Relationship Report

rpt_adTermRelationship.rpt
ADMINISTRATOR

Version Start Date between 2007-01-01 12:00 am and 2013-01-08 11:59 pm
Include Inactive Terms : No
Campuses:
Campus Management Institute

1/8/2013
4:14:32 PM

*=possible term usage error

Campus Management Institute

Term Code	Term Description	Term Start	Term End	Add/Drop Dt	Length (days)	Term Flag
*TAMMY	TAMMY	1/1/2007	12/31/2007		365	SA/FA/Reg
2007 WINTEF	**2007 WINTER**	**1/12/2007**	**4/13/2007**	**1/26/2007**	**92**	**SA/FA/Reg**
*2007WA	2007 Winter Mini 1	1/12/2007	2/16/2007	7/20/2007	36	SA/FA/Reg
PARENTTERI	**PARENTTERM32159**	**7/1/2007**	**12/31/2007**		**184**	**SA/FA/Reg**
*CHILDTERM 3	childterm32159	7/5/2007	11/30/2007		149	SA/FA/Reg
*DLTEST	DLTEST	8/1/2007	7/31/2008		366	Reg/SA
*20070904	20070904	9/4/2007	12/14/2007	9/11/2007	102	SA/FA/Reg
*2008WIN	2008WIN	1/23/2008	7/31/2008		191	SA/FA/Reg
200810D	**200810D**	**10/2/2008**	**12/16/2008**	**10/11/2008**	**76**	**FA/SA**
200810D1	2008 Fall - First Session	10/2/2008	11/8/2008	10/11/2008	38	Reg
200810D3	2008 Fall - Full Session	10/2/2008	12/16/2008	10/11/2008	76	Reg
200811D2	2008 Fall - Second Session - Child	11/9/2008	12/16/2008	11/15/2008	38	Reg
200811DM	2008 Fall - Mid-Quarter Start	11/9/2008	12/16/2008	11/15/2008	38	Reg
*2009AY	2009AY	1/1/2009	12/31/2009	8/14/2009	365	SA/FA/Reg
*PIVJAN	PIVJAN	1/1/2009	3/31/2009		90	SA/FA/Reg
*200901A	200901A	1/5/2009	3/15/2009	1/11/2009	70	FA/SA
*030109	030109	3/1/2009	4/30/2009		61	SA/FA/Reg
*200903PRES	200903PRESTON	3/10/2009	5/10/2009		62	SA/FA/Reg
*2009AKML	2009AKML	6/1/2009	7/31/2009		61	SA/FA/Reg
*2009AUG	2009AUG	8/1/2009	12/31/2009	8/31/2009	153	SA/FA/Reg
*2009BKML	2009BKML	8/1/2009	11/30/2009		122	SA/FA/Reg
*TEST	TEST	8/1/2009	8/1/2009	8/14/2009	1	SA/FA/Reg
*SPR2010	SPR2010	1/4/2010	5/7/2010		124	SA/FA/Reg
*SPR10	SPR10	1/5/2010	4/1/2010		87	SA/FA/Reg
*2010-2011	2010-2011	9/6/2010	9/5/2011		365	SA/FA/Reg
*2011JUNE	2011JUNE	6/1/2011	9/30/2011	6/10/2011	122	SA/FA/Reg
*TEST2	TEST2	6/1/2011	7/1/2011		31	SA/FA/Reg
*111670_1	111670_1	7/1/2011	6/28/2013		729	SA/FA/Reg
*111670T1	111670T1	7/1/2011	6/28/2012		364	SA/FA/Reg
*111670T2	111670T2	7/1/2011	6/28/2012		364	SA/FA/Reg
*JFTERM	JFTERM	7/1/2011	7/31/2011		31	SA/FA/Reg
*2011-2012	2011-2012	9/19/2011	9/23/2012		371	SA/FA/Reg
*FALL 2012	FALL 2012	6/21/2012	12/28/2012	6/22/2012	191	SA/FA/Reg

Campus Management

Page 1 of 1

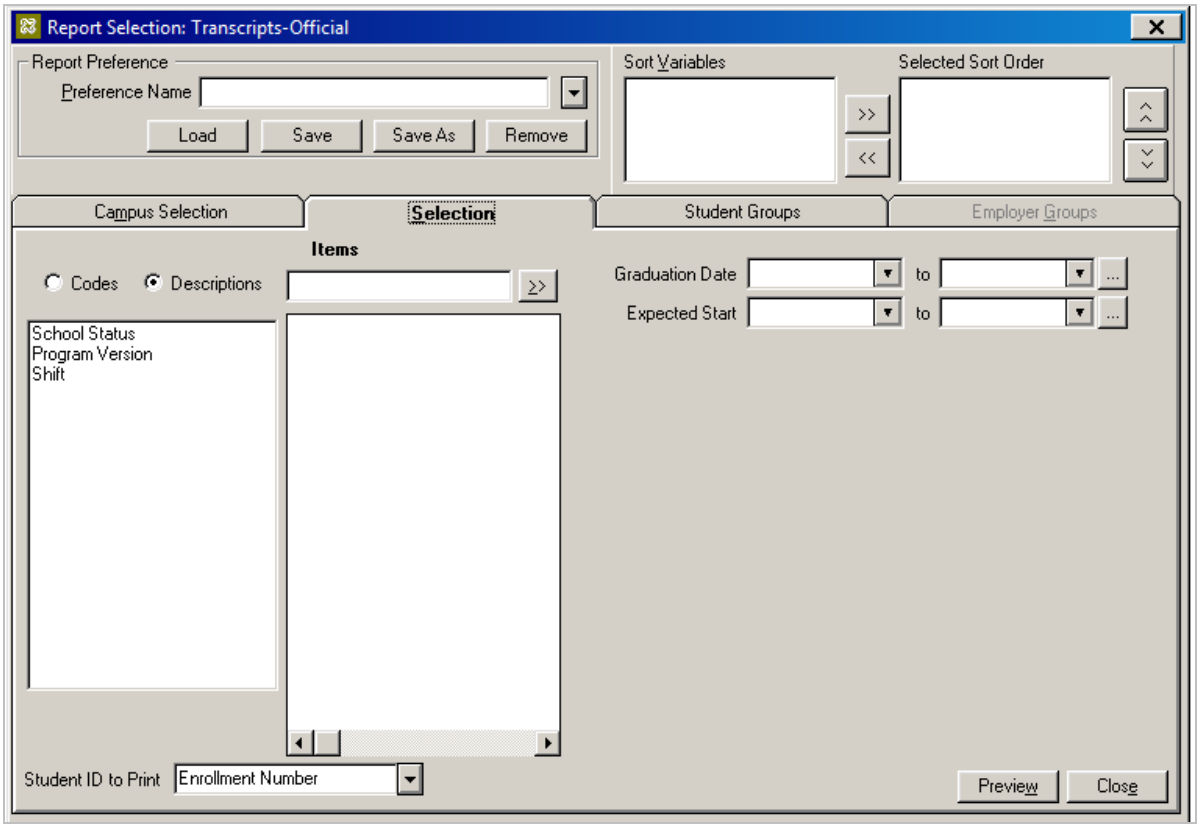
Transcripts-Official

Student Transcripts can be run from the Reports menu (for multiple students) or from the View > Academic Records > Final Grades > Print option (for a selected student).

The transcript report can retrieve a student's entire academic history (all enrollments), regardless of selection criteria. Students are selected by graduation date (and possibly school statuses as well) when batch printing transcripts. If a graduation date returns a student's record, all grades related to all enrollments for that student are printed on the transcript. Since the transcript is a representation of all course work completed at the school, all the enrollments are displayed. Additionally, the SAP status for each term is added to the view (Excel output) for the report so that you can display this information on your custom transcript. A note is displayed on the transcript, if the student has elected to take a class on a pass/fail basis.

To run the report:

1. Navigate to **Reports > Academic Records > Transcripts-Official**. The Report Selection: Transcripts-Official form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

Each student enrollment begins on a new page with a student identification header on each page. Each page is divided horizontally in two sections. Term and course information flows from the top of the left section to the bottom of the right section on each page. If multiple pages are required for a student's record, the header is repeated on the next page and details continue in the left section.

When all data is listed, a message is displayed to signify the end of the report: "*** End of Transcript ***".

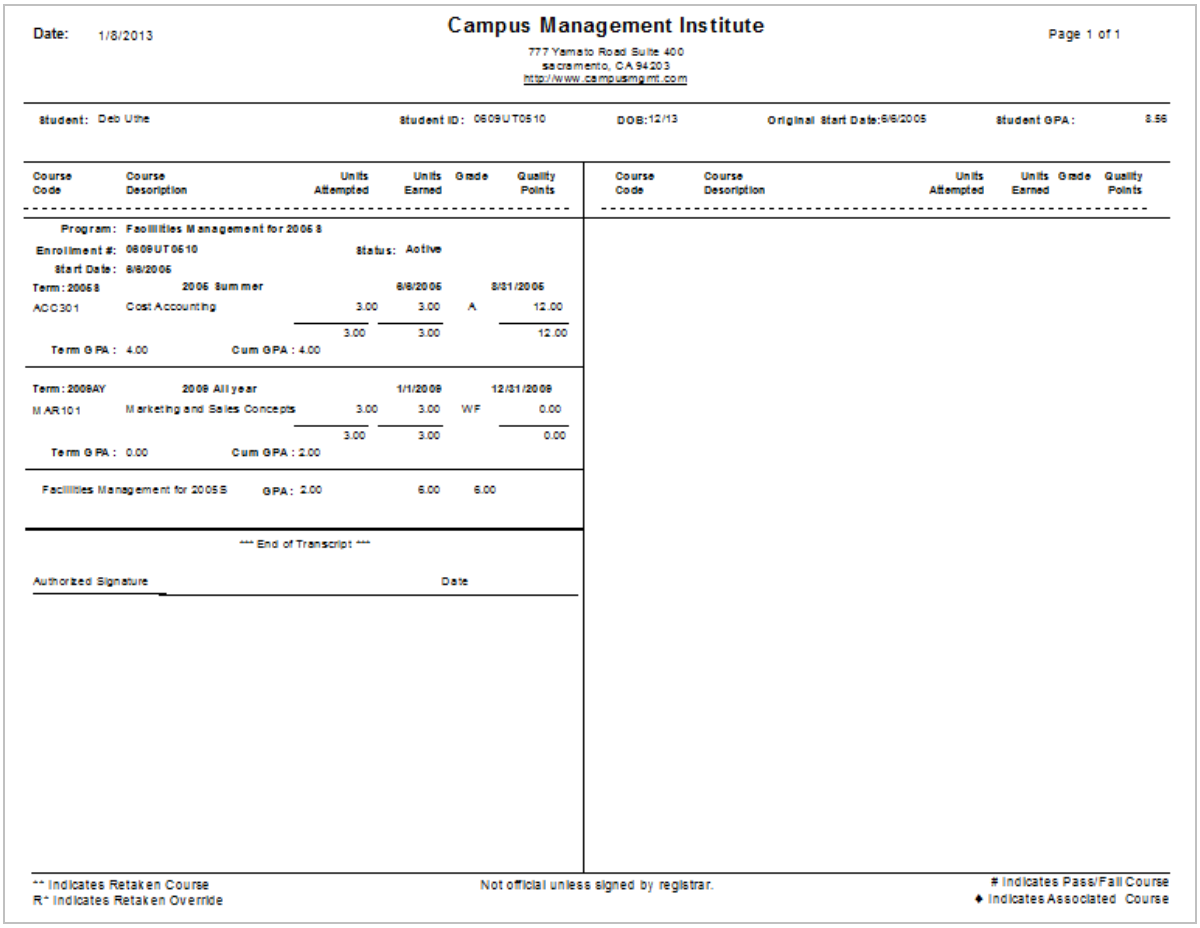
This message is displayed at the bottom of all pages: "Not official unless signed by registrar."

Terms are listed in chronological order. For each term in which the student is enrolled, the courses for which grades have been posted are listed. The detail line for each course shows the course code, course description, credits attempted, credits earned, letter grade, and quality points. A summary line is displayed for each term and includes the term GPA, total credits attempted, total credits earned, and total quality points.

If a student is enrolled in a program that has both a program version description and a transcript description, the transcript displays the transcript description. If a student is enrolled in a program that has only a program version description, the transcript displays the program version.

The transcript shows the Catalog Code for the course (if there is a value in the Catalog Code field). If there is no value in Catalog Code, then the Code is printed.

At the end of the transcript, a summary line is displayed that includes the description of the enrollment, total credits attempted, total credits earned, and cumulative GPA.



Date: 1/8/2013

Campus Management Institute

777 Yamato Road Suite 400
sacramento, CA 94203
http://www.campusmgmt.com

Page 1 of 1

Student: Deb Uthe Student ID: 0609UT0510 DOB:12/13 Original Start Date:6/6/2005 Student GPA: 3.56

Course Code	Course Description	Units Attempted	Units Earned	Grade	Quality Points
Program: Facilities Management for 2006 S					
Enrollment #: 0609UT0510	Status: Active				
Start Date: 6/6/2006					
Term: 2006 S	2006 Summer		6/6/2006		8/31/2006
ACC301	Cost Accounting	3.00	3.00	A	12.00
		3.00	3.00		12.00
Term GPA: 4.00	Cum GPA: 4.00				
Term: 2008AY	2008 All year		1/1/2008		12/31/2008
MAR101	Marketing and Sales Concepts	3.00	3.00	WF	0.00
		3.00	3.00		0.00
Term GPA: 0.00	Cum GPA: 2.00				
Facilities Management for 2006 S	GPA: 2.00		6.00	6.00	

*** End of Transcript ***

Authorized Signature _____ Date

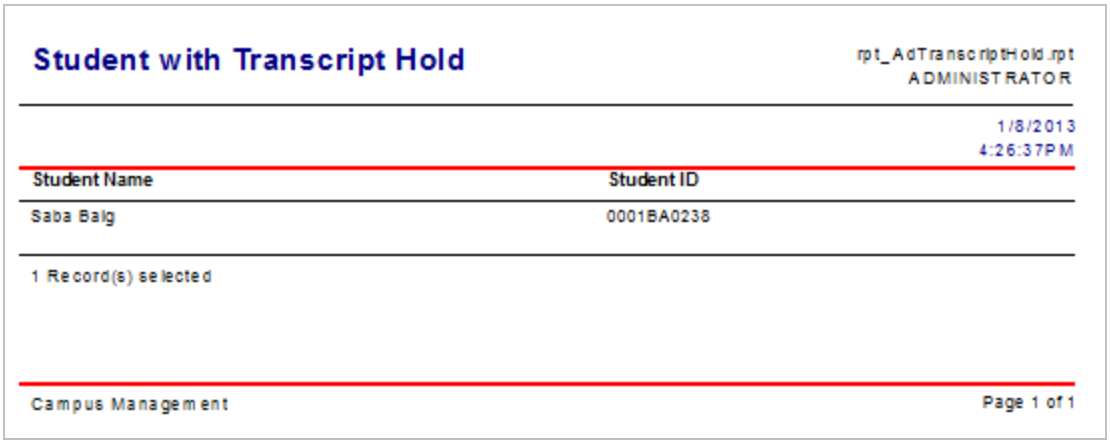
** Indicates Retaken Course
R* Indicates Retaken Override

Not official unless signed by registrar.

# Indicates Pass/Fail Course
♦ Indicates Associated Course

Note: Student Transcripts are not printed for students with a status of Transcript Hold. However, staff members may be given the authority to override the transcript hold and print transcripts for an individual student or in a batch

mode. If the staff member has permission to override the Transcript Hold and request the Transcript Report, a cover page is presented that contains a list of student's with a status of 'Transcript Hold'. The staff member can select to 'Include Transcript Holds'. If the staff member does not have permission to override the transcript hold, then the students with a status of 'Transcript Hold' are not included in the report.



Student with Transcript Hold

rpt_AdTranscriptHold.rpt
ADMINISTRATOR

1/8/2013
4:26:37PM

Student Name	Student ID
Saba Baig	0001BA0238

1 Record(s) selected

Campus Management

Page 1 of 1

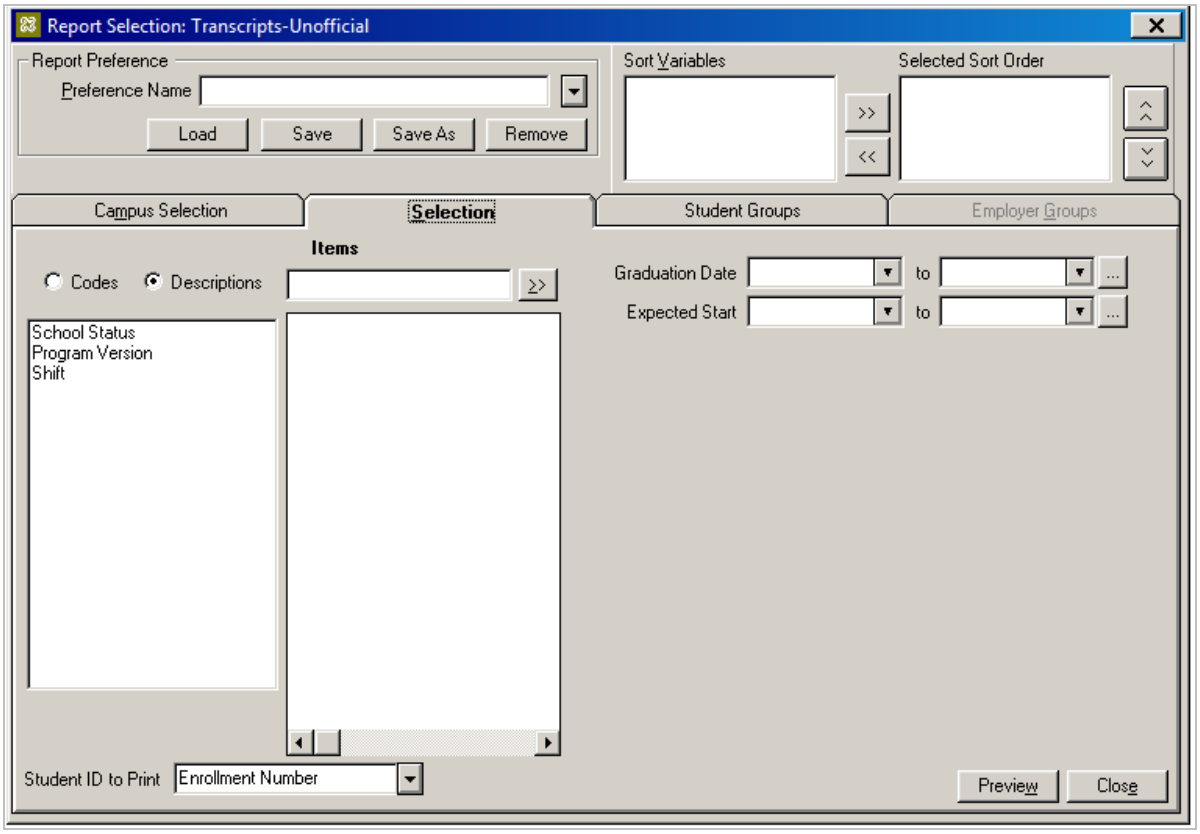
Transcripts-Unofficial

The unofficial transcript includes everything that is currently printed on the official transcript. In addition, the unofficial transcript includes current classes from the student's schedule. The phrase, "- In Progress" follows the term description in the heading for any term (i.e., Spring 2003 - In Progress) that includes current classes. Current classes are not included in any calculations on the report. The unofficial transcript also includes the word "UNOFFICIAL" at the top of each page and does not include an authorized signature and date line.

The transcript report can retrieve a student's entire academic history (all enrollments), regardless of selection criteria. Students are selected by graduation date (and possibly school statuses as well) when batch printing transcripts. If a graduation date returns a student's record, all grades related to all enrollments for that student are printed on the transcript. Since the transcript is a representation of all course work completed at the school, all the enrollments are displayed. Additionally, the SAP status for each term is added to the view (Excel output) for the report so that you can display this information on your custom transcript. A note is displayed on the transcript, if the student has elected to take a class on a pass/fail basis.

To run the report:

1. Navigate to **Reports > Academic Records > Transcripts-Unofficial**. The Report Selection: Transcripts-Unofficial form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



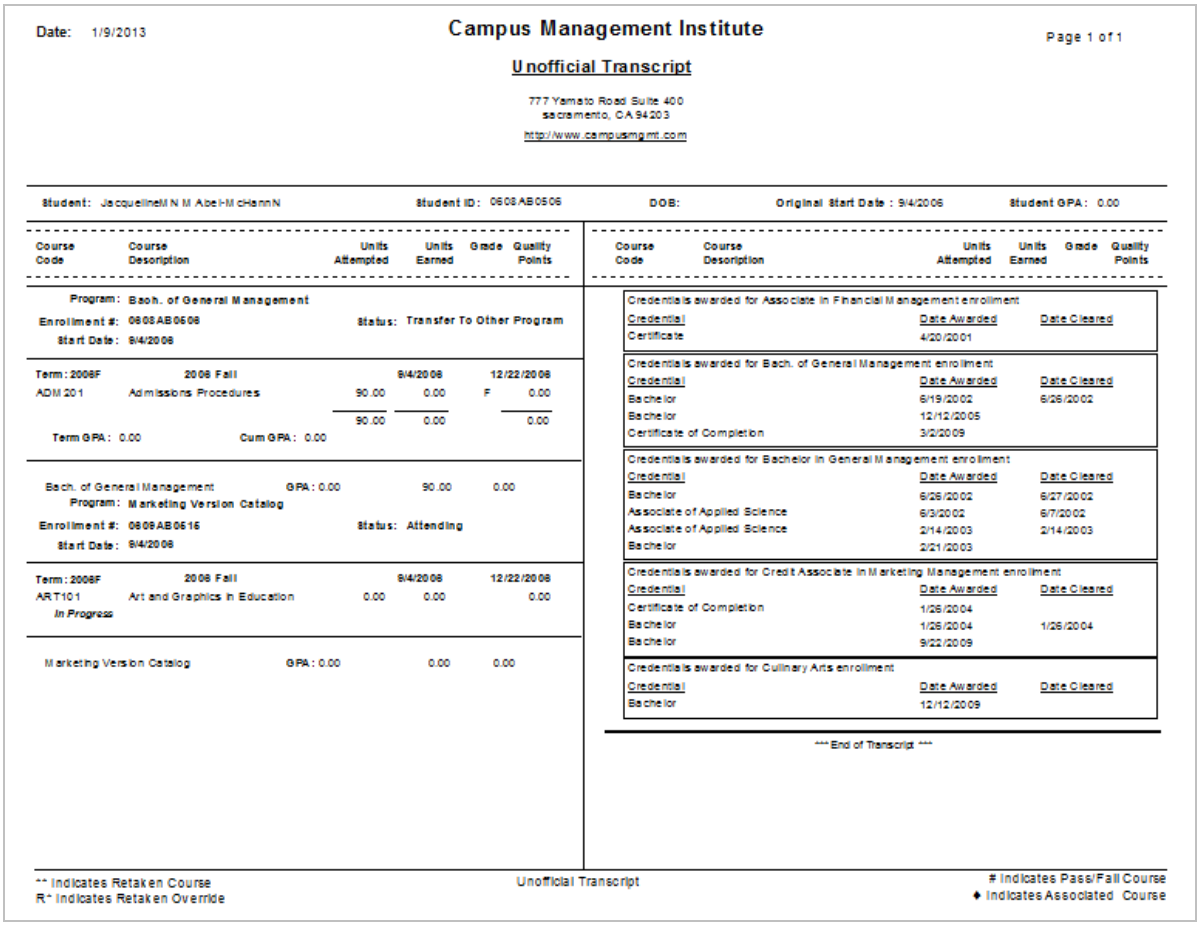
4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   If a student is enrolled in a program that has both a program version description and a transcript description, the transcript displays the transcript description. If a student is enrolled in a program that has only a program version description, the transcript displays the program version.

   A note next to a final grade indicates that the retake override flag is set. Example: If the Retake Override indicator is on, then "R*" is listed next to the grade. The transcript is the only report that identifies a course as being a Retake.



Date: 1/9/2013

Campus Management Institute

Page 1 of 1

Unofficial Transcript

777 Yamato Road Suite 400
sacramento, CA 94203
http://www.campusmgmt.com

Student: JacquelineM N M Abel-M cHannN Student ID: 0608AB0506 DOB: Original Start Date : 9/4/2006 Student GPA: 0.00

Course Code	Course Description	Units Attempted	Units Earned	Grade	Quality Points
Program: Bach. of General Management					
Enrollment #: 0608AB0506	Status: Transfer To Other Program				
Start Date: 9/4/2006					
Term: 2006F	2006 Fall		9/4/2006		12/22/2006
ADM 201	Admissions Procedures	90.00	0.00	F	0.00
		90.00	0.00		0.00
Term GPA: 0.00	Cum GPA: 0.00				
Bach. of General Management	GPA: 0.00		90.00		0.00
Program: Marketing Version Catalog					
Enrollment #: 0609AB0616	Status: Attending				
Start Date: 9/4/2006					
Term: 2006F	2006 Fall		9/4/2006		12/22/2006
ART101	Art and Graphics in Education	0.00	0.00		0.00
In Progress					
Marketing Version Catalog	GPA: 0.00		0.00		0.00

Credentials awarded for Associate in Financial Management enrollment

Credential	Date Awarded	Date Cleared
Certificate	4/20/2001	

Credentials awarded for Bach. of General Management enrollment

Credential	Date Awarded	Date Cleared
Bachelor	6/19/2002	6/26/2002
Bachelor	12/12/2005	
Certificate of Completion	3/2/2009	

Credentials awarded for Bachelor in General Management enrollment

Credential	Date Awarded	Date Cleared
Bachelor	6/26/2002	6/27/2002
Associate of Applied Science	6/3/2002	6/7/2002
Associate of Applied Science	2/14/2003	2/14/2003
Bachelor	2/21/2003	

Credentials awarded for Credit Associate in Marketing Management enrollment

Credential	Date Awarded	Date Cleared
Certificate of Completion	1/26/2004	
Bachelor	1/26/2004	1/26/2004
Bachelor	9/22/2009	

Credentials awarded for Culinary Arts enrollment

Credential	Date Awarded	Date Cleared
Bachelor	12/12/2009	

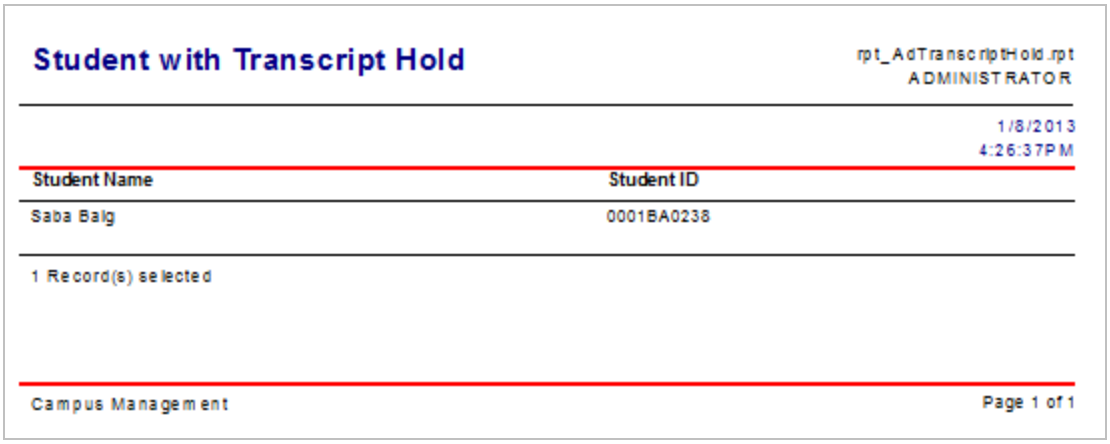
*** End of Transcript ***

** Indicates Retaken Course
R* Indicates Retaken Override

Unofficial Transcript

# Indicates Pass/Fail Course
♦ Indicates Associated Course

Note: Student Transcripts are not printed for students with a status of Transcript Hold. However, staff members may be given the authority to override the transcript hold and print transcripts for an individual student or in a batch mode. If the staff member has permission to override the Transcript Hold and request the Transcript Report, a cover page is presented that contains a list of student's with a status of 'Transcript Hold'. The staff member can select to 'Include Transcript Holds'. If the staff member does not have permission to override the transcript hold, then the students with a status of 'Transcript Hold' are not included in the report.



Student with Transcript Hold

rpt_AdTranscriptHold.rpt
ADMINISTRATOR

1/8/2013
4:26:37PM

Student Name	Student ID
Saba Baig	0001BA0238

1 Record(s) selected

Campus Management

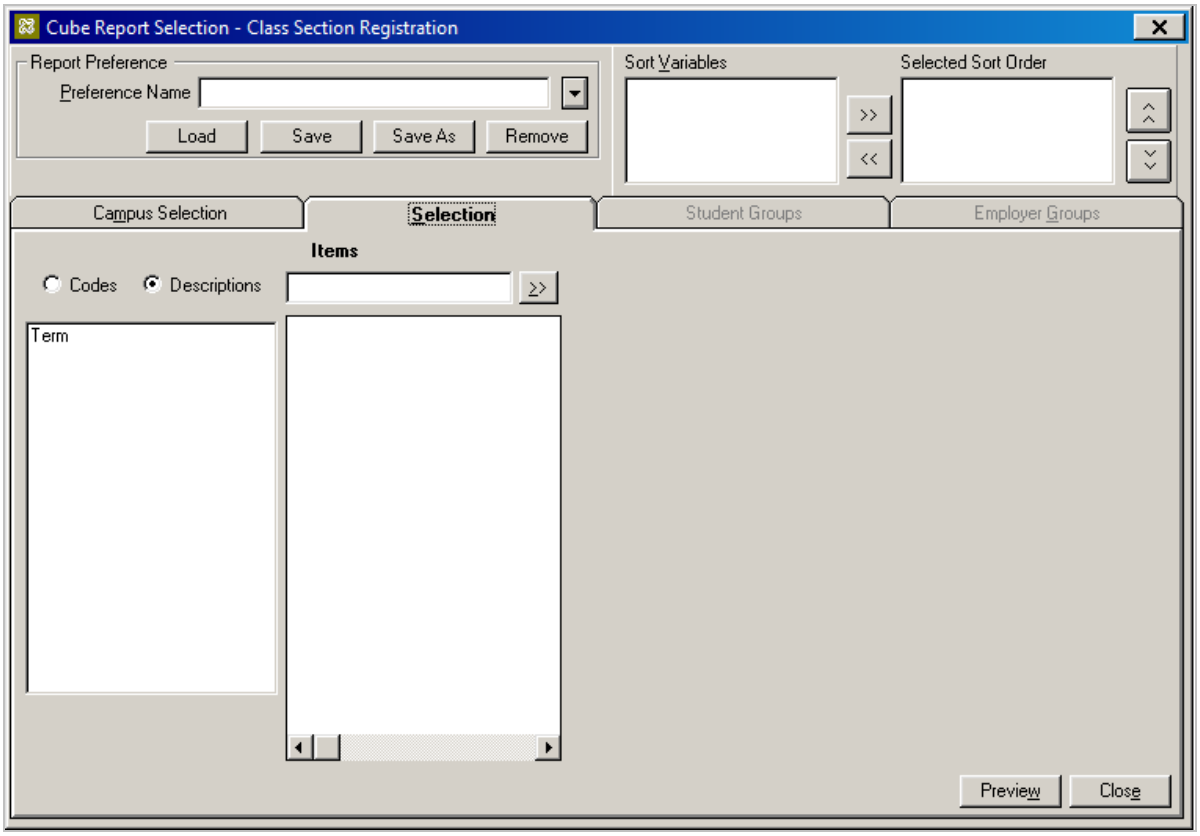
Page 1 of 1

Class Section Registration

This cube report helps you analyze class registration statistics. The report helps to plan the use of school resources such as instructors, classrooms, and time. For example, you can see which instructors, which students, which class sections are in what rooms at what time on what days of the week in the fall term.

To run the report:

1. Navigate to **Reports > Academic Records > Class Section Registration**. The Cube Report Selection: Class Section Registration form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



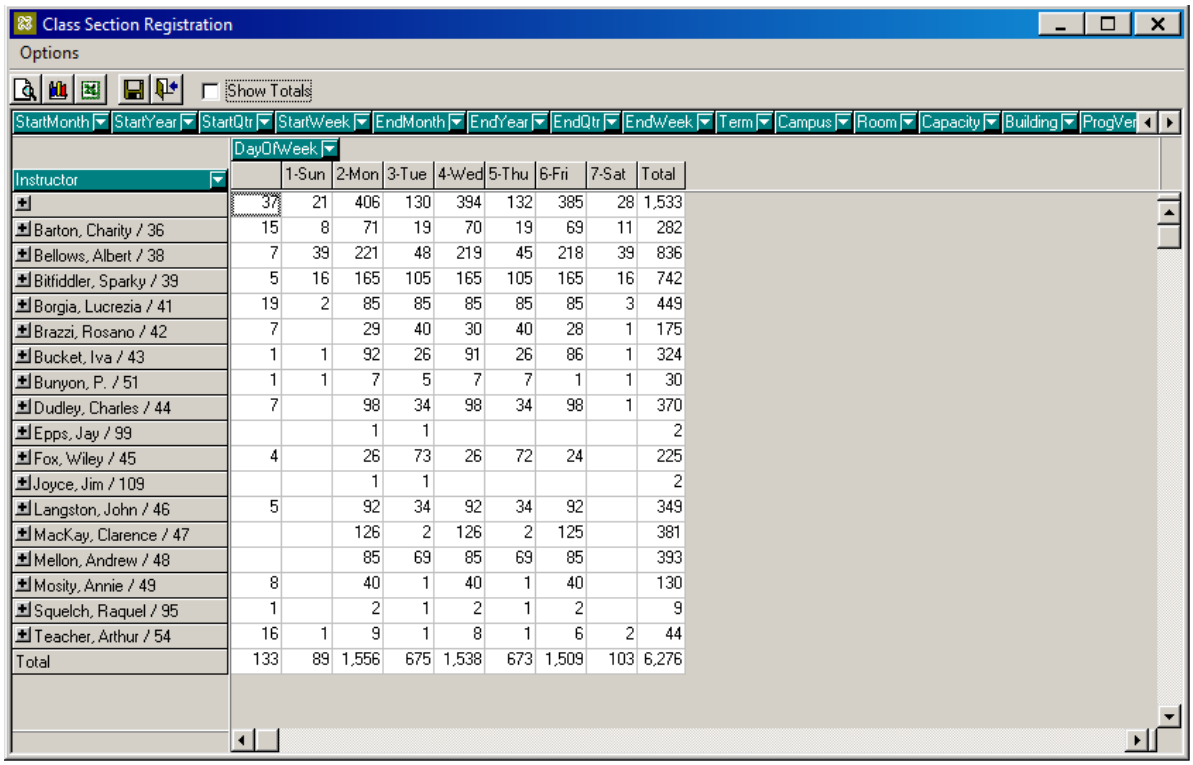
4. Click **Preview**. The cube report is assembled and displayed.

   The following variables are available for use in this cube report:

   - Campus
   - Building
   - Room
   - Room Capacity
   - Day of the Week
   - Period
   - Course/Section
   - Course Hours

- Program Version Code
- Program Version Description
- Instructor Name
- Student Name
- Term
- Start Year
- Start Quarter
- Start Month
- Start Week
- End Year
- End Quarter
- End Month
- End Week

Drag the variables to the vertical or horizontal axes as needed to get the cross-tabulated spreads. The cube is initialized with Instructor as the Y axis (rows) and Day of the Week as the X axis (columns).



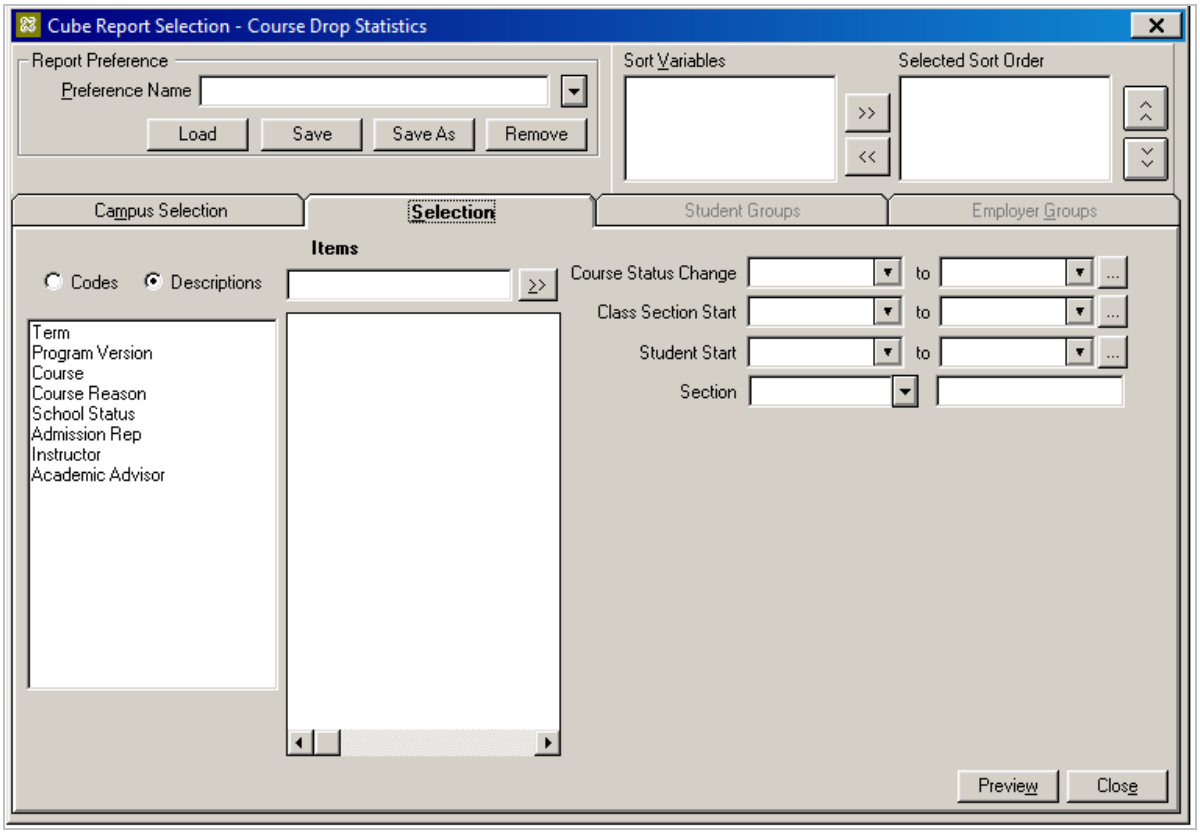
Instructor	1-Sun	2-Mon	3-Tue	4-Wed	5-Thu	6-Fri	7-Sat	Total
	37	21	406	130	394	132	385	28	1,533
Barton, Charity / 36	15	8	71	19	70	19	69	11	282
Bellows, Albert / 38	7	39	221	48	219	45	218	39	836
Bitfiddler, Sparky / 39	5	16	165	105	165	105	165	16	742
Borgia, Lucrezia / 41	19	2	85	85	85	85	85	3	449
Brazzi, Rosano / 42	7		29	40	30	40	28	1	175
Bucket, Iva / 43	1	1	92	26	91	26	86	1	324
Bunyon, P. / 51	1	1	7	5	7	7	1	1	30
Dudley, Charles / 44	7		98	34	98	34	98	1	370
Epps, Jay / 99			1	1					2
Fox, Wiley / 45	4		26	73	26	72	24		225
Joyce, Jim / 109			1	1					2
Langston, John / 46	5		92	34	92	34	92		349
MacKay, Clarence / 47			126	2	126	2	125		381
Mellon, Andrew / 48			85	69	85	69	85		393
Mosity, Annie / 49	8		40	1	40	1	40		130
Squelch, Raquel / 95	1		2	1	2	1	2		9
Teacher, Arthur / 54	16	1	9	1	8	1	6	2	44
Total	133	89	1,556	675	1,538	673	1,509	103	6,276

Course Drop Statistics

This cube report helps you analyze course drop statistics.

To run the report:

1. Navigate to **Reports > Academic Records > Course Drop Statistics**. The Cube Report Selection: Course Drop Statistics form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



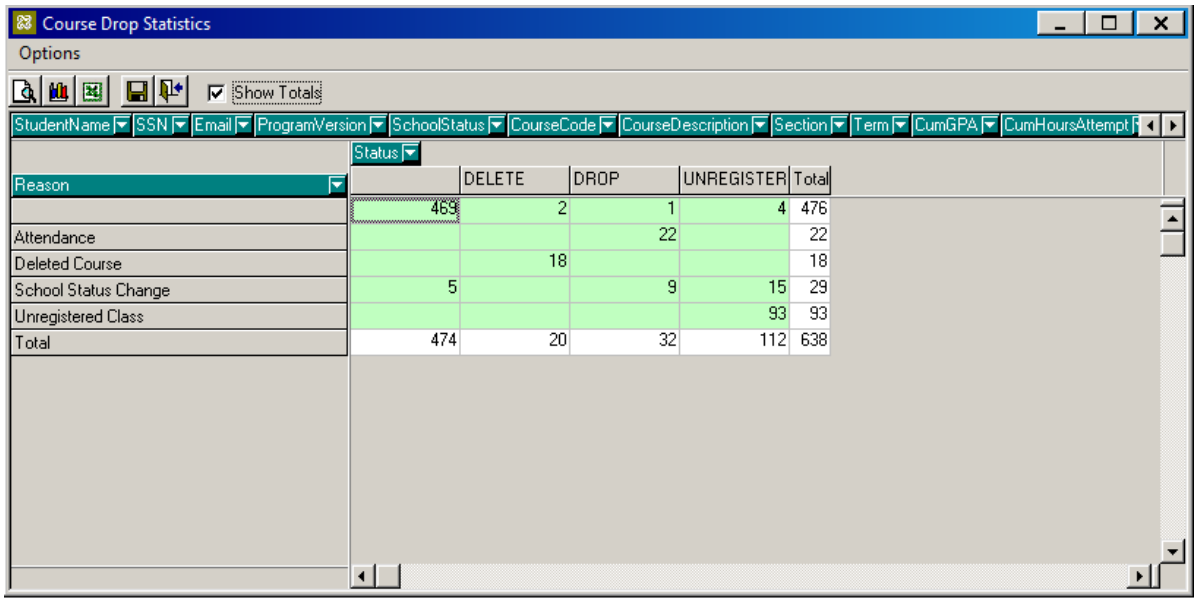
4. Click **Preview**. The cube report is assembled and displayed.

   The following variables are available for use in this cube report:

   - Student Name
   - SSN
   - Email
   - Program Version
   - School Status
   - Course Code
   - Course Description
   - Section
   - Term
   - Cumulative GPA

- Cumulative Hours Attempted
- Cumulative Hours Earned
- Campus
- Academic Advisor
- Instructor
- Admissions Representative
- Course Status Change Date
- Student Start
- Class Section Start
- Reason
- Status

Drag the variables to the vertical or horizontal axes as needed to get the cross-tabulated spreads. The cube is initialized with Reason as the Y axis (rows) and Status as the X axis (columns).

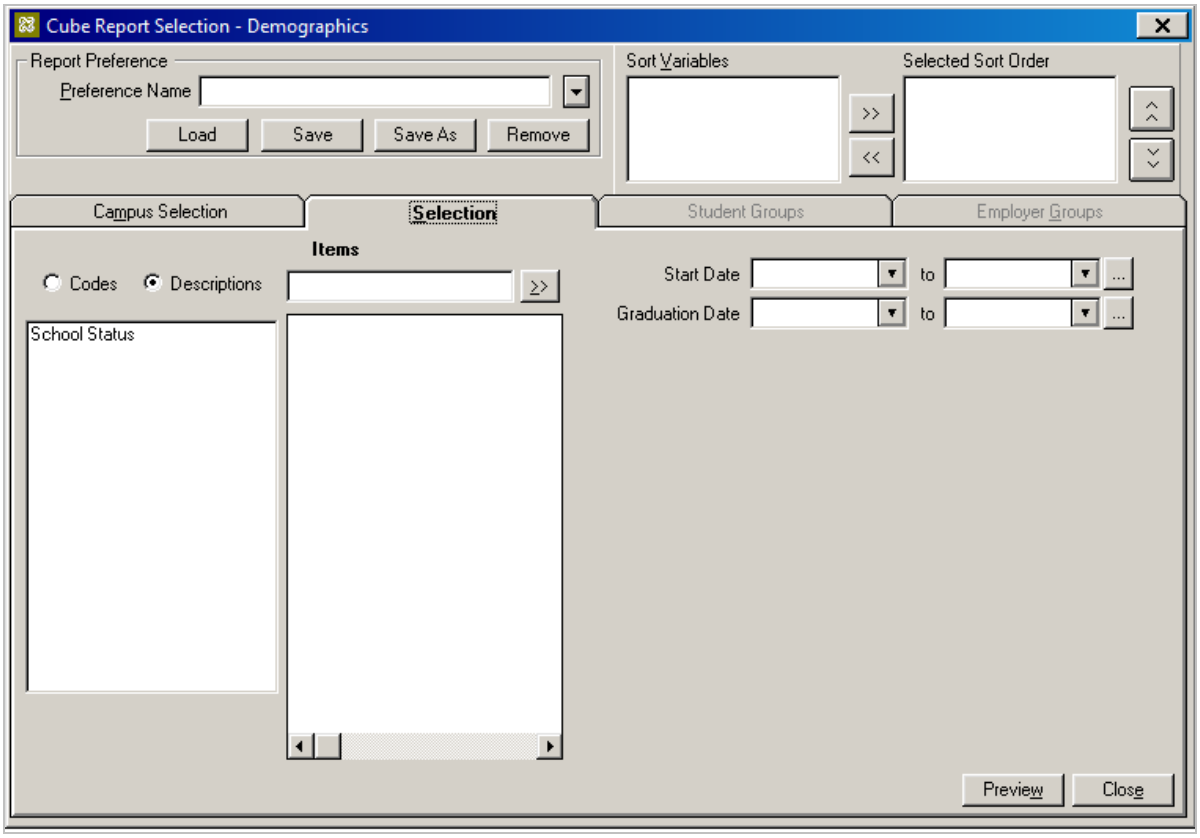


Demographics

This cube report helps you analyze student demographics in your school.

To run the report:

1. Navigate to **Reports > Academic Records > Demographics**. The Cube Report Selection: Demographics form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



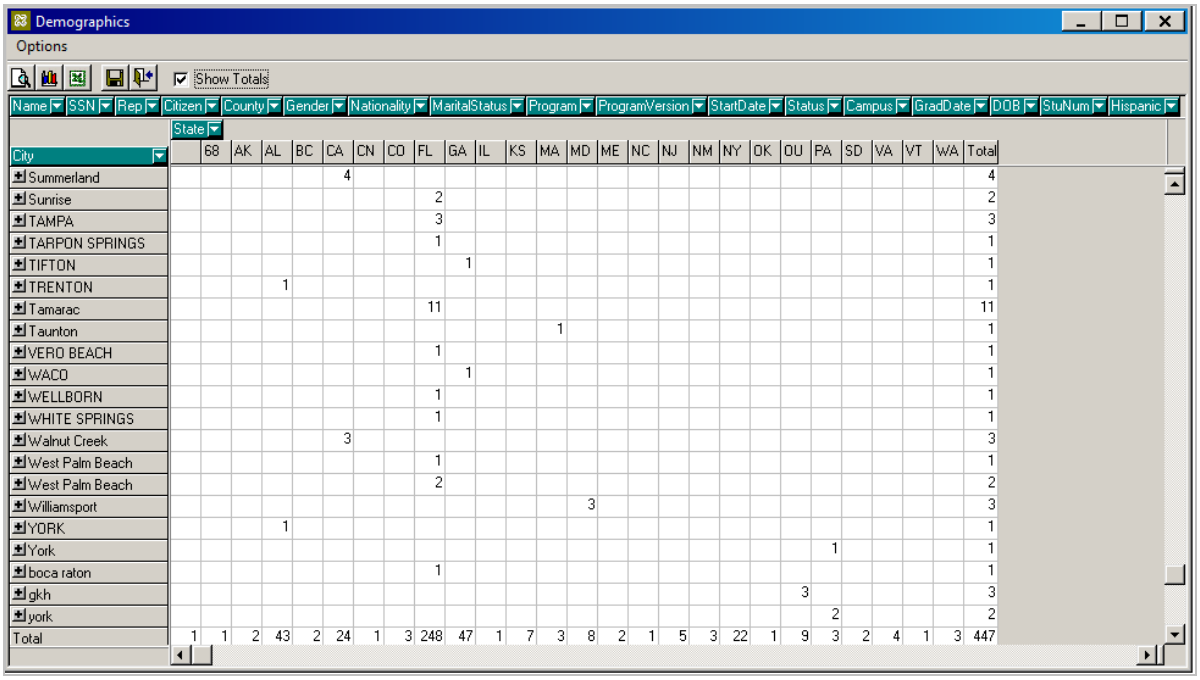
4. Click **Preview**. The cube report is assembled and displayed.

   The following variables are available for use in this cube report:

   - Name
   - Social Security Number (SSN)
   - Admissions Rep
   - Citizenship Status
   - County
   - Gender
   - Nationality
   - Marital Status
   - Program
   - Program Version

- Start Date
- Status
- Campus
- Graduation Date
- Date of Birth (DOB)
- Student ID Number
- Ethnicity
- City
- State

Drag the variables to the vertical or horizontal axes as needed to get the cross-tabulated spreads. The cube is initialized with City as the Y axis (rows) and State as the X axis (columns).



Future Course Seat Requirements

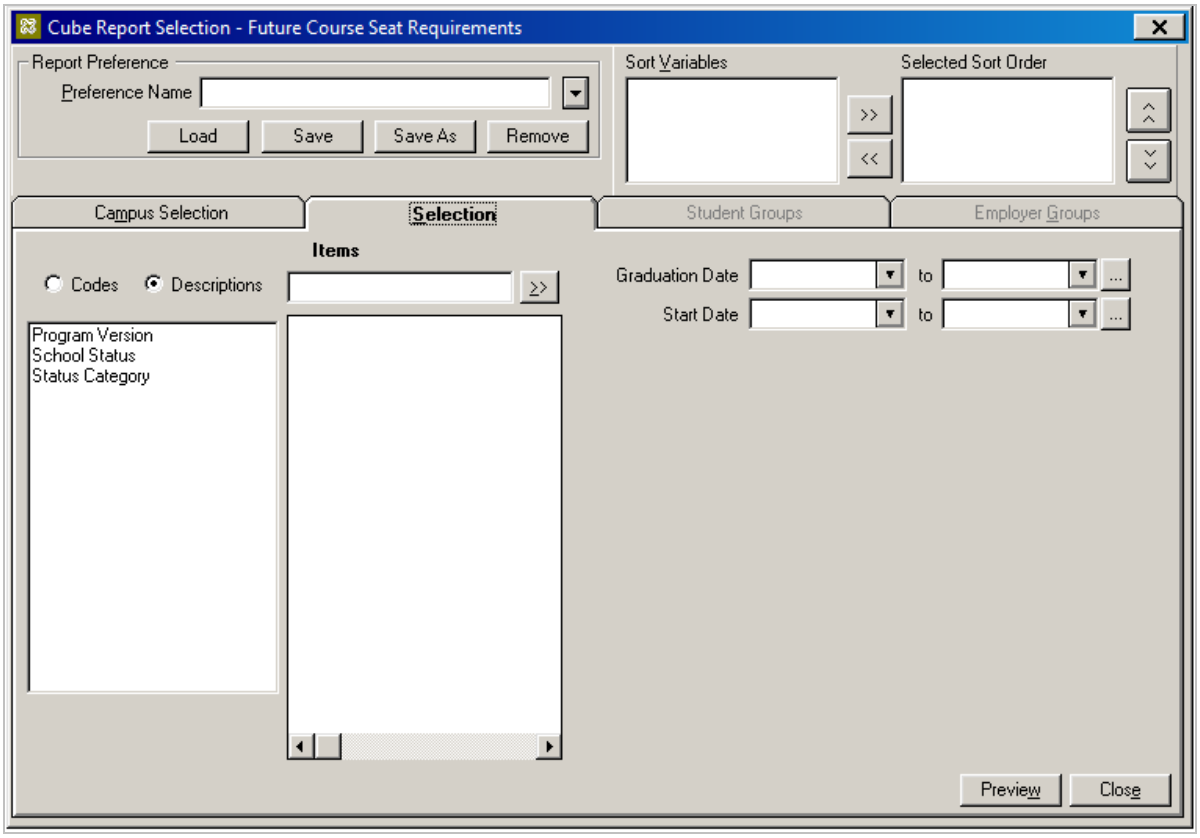
This cube report allows you to see the number of students that need to take specific courses before the given graduation date. The report helps to plan future class schedules.

The report displays the number of students with a "future" class record for any course that meets the selection criteria, grouped by graduation date. The view gathers only students in a status category of:

- E - Enrollment
- A - Active
- T - Temporary Out

To run the report:

1. Navigate to **Reports > Academic Records > Future Course Seat Requirements**. The Cube Report Selection: Future Course Seat Requirements form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



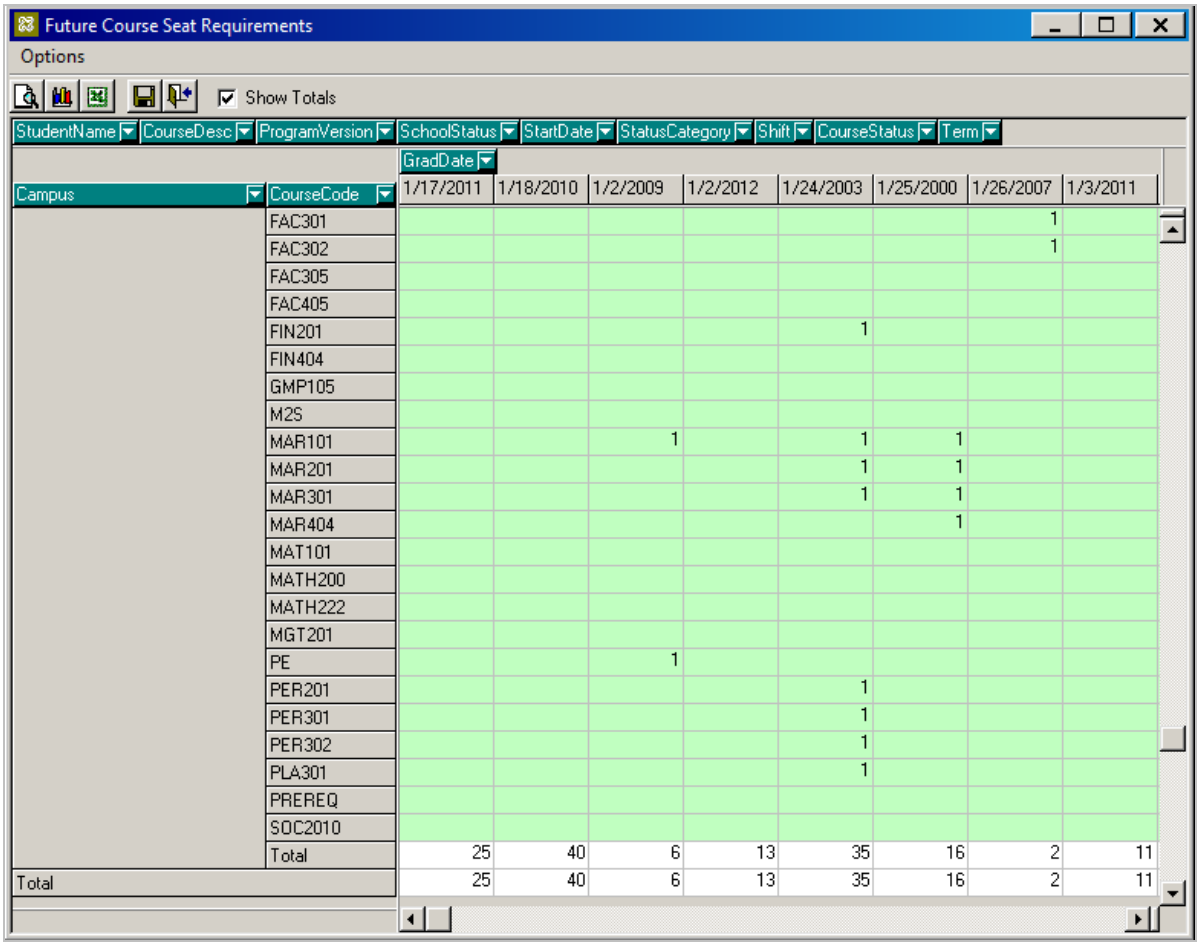
4. Click **Preview**. The cube report is assembled and displayed.

   The following variables are available for use in this cube report:

   - Student Name
   - Course Description
   - Program Version

- School Status
- Start Date
- Status Category
- Shift
- Course Status
- Term
- Graduation Date
- Campus
- Course Code

Drag the variables to the vertical or horizontal axes as needed to get the cross-tabulated spreads. The cube is initialized with Campus and Course Code as the Y axis (rows) and Graduation Date as the X axis (columns).

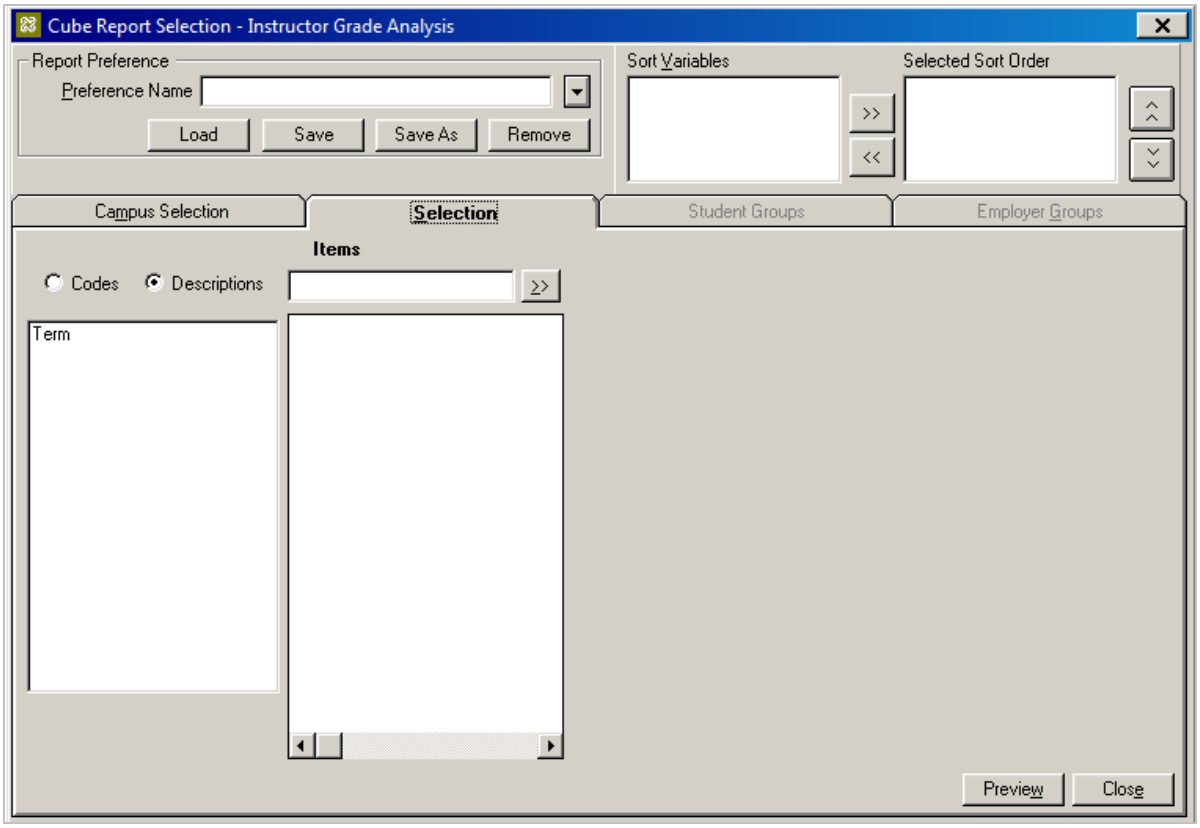


Instructor Grade Analysis

This cube report can be used to evaluate the grading patterns of your instructors.

To run the report:

1. Navigate to **Reports > Academic Records > Instructor Grade Analysis**. The Cube Report Selection: Instructor Grade Analysis form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

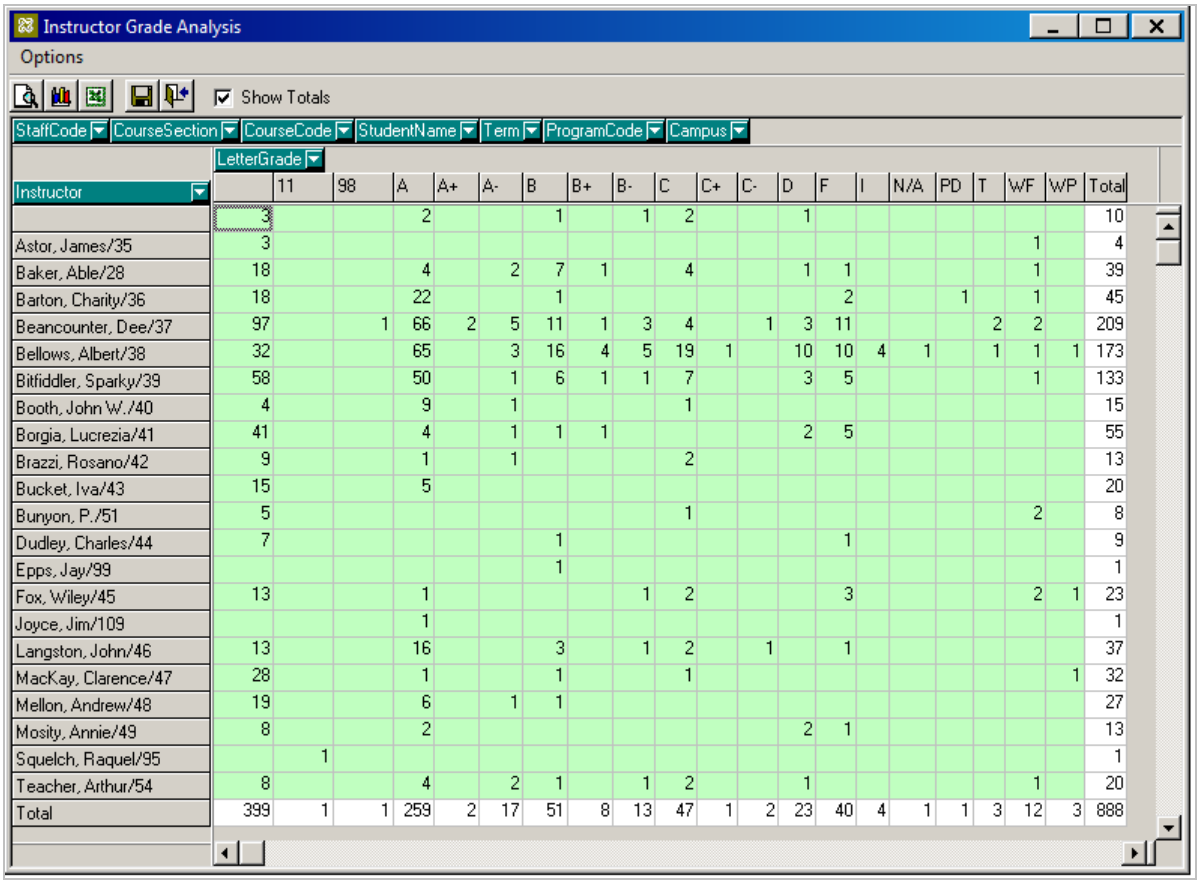


4. Click **Preview**. The cube report is assembled and displayed.

   The following variables are available for use in this cube report:

   - Staff Code
   - Course Section
   - Course Code
   - Student Name
   - Term
   - Program Code
   - Campus
   - Instructor Name
   - Letter Grade

The cube is initialized with Instructor as the Y axis (rows) and Letter Grade as the X axis (columns).



Term Enrollment Summary

The Registrar and Finance departments generate the Term Enrollment Summary Cube Report upon matriculation of students each new term. The Registrar uses it to report registration depending on the program version to assist program chairs in the scheduling process.

To run the report:

1. Navigate to **Reports > Academic Records > Term Enrollment Summary**. The Cube Report Selection: Term Enrollment Summary form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

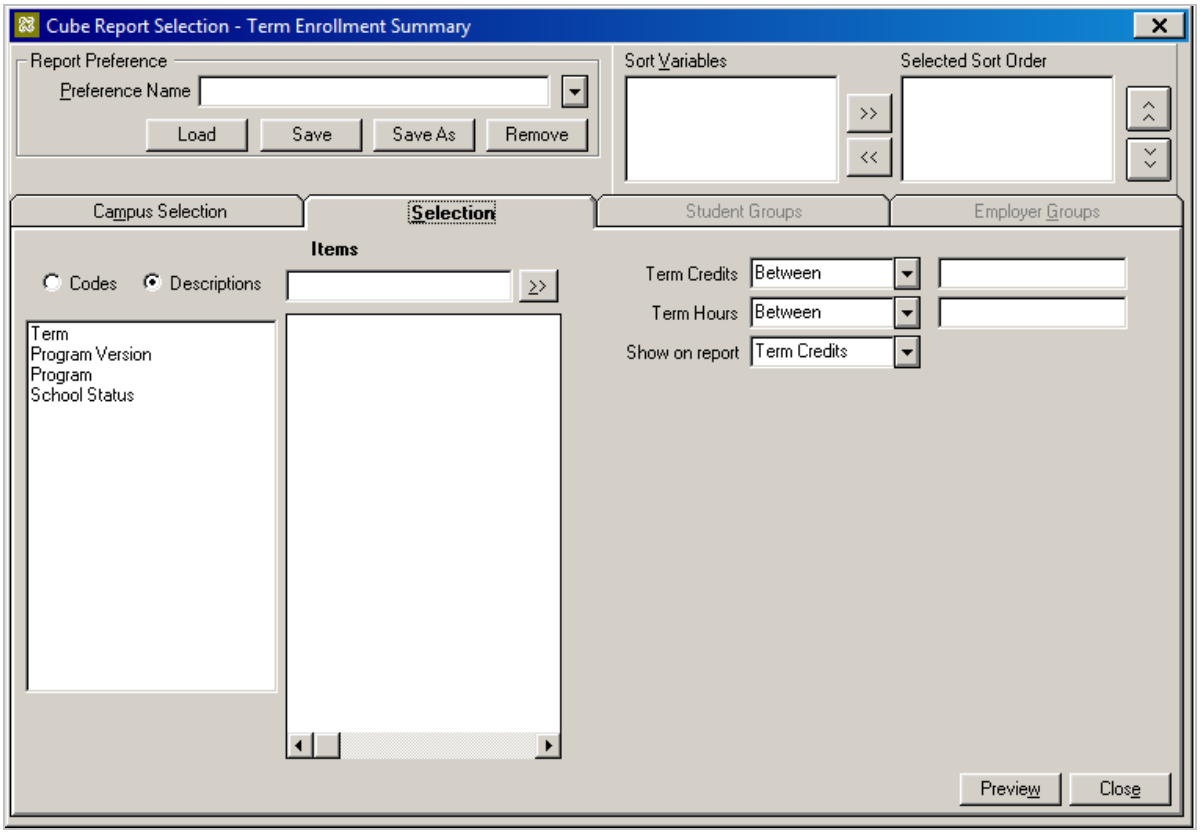
   Notes:

   You can query by Term Credit ranges and/or Term Hours ranges. Use a semi-colon (;) to separate the beginning value and ending value of the ranges. The system matches the student's total number of credits/hours if you enter values in the term credit/hours range fields.

   If no term credits/hours range is entered, the report defaults to the number of credits in each Term selected.

   The 'Show on Report' drop-down allows you to select only the Term Credit ranges, Term Hours ranges, or both.

   The report displays all terms when you select Program/Program Version or School Status as the selection criteria.

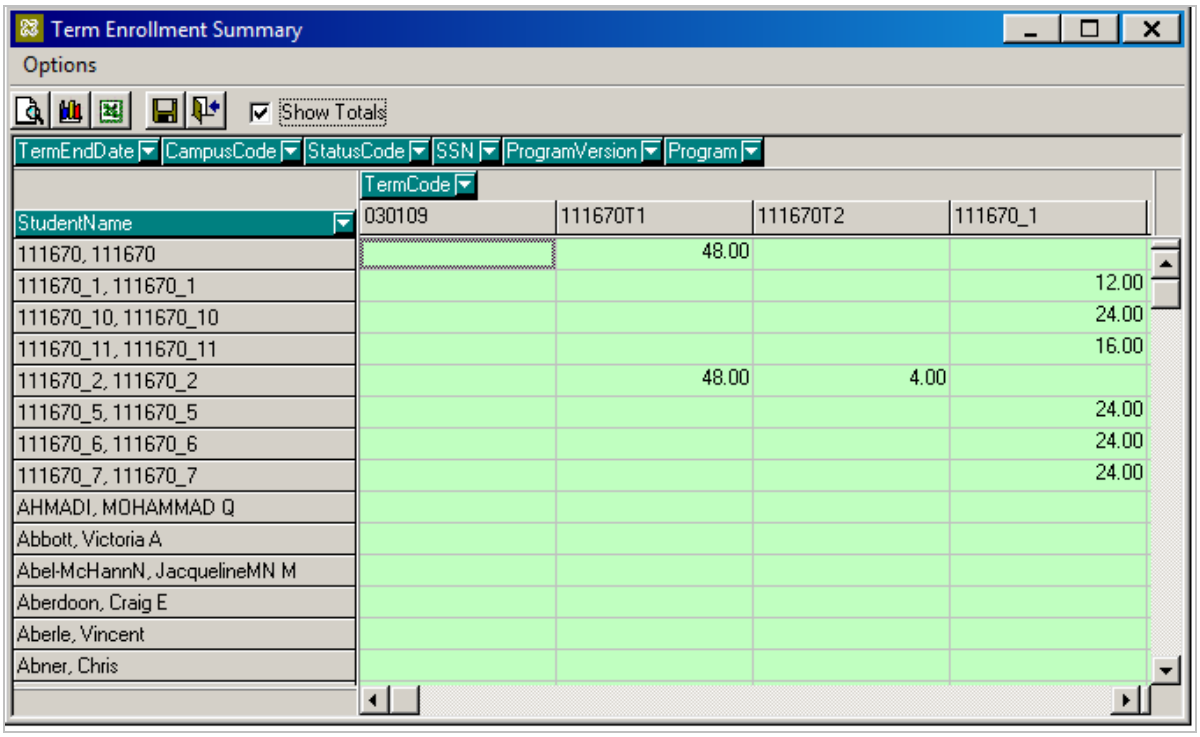


4. Click **Preview**. The cube report is assembled and displayed.

The following variables are available for use in this cube report:

- Term End Date
- Campus Code
- Status Code
- SSN
- Program Version
- Program
- Term Code
- Student Name

Drag the variables to the vertical or horizontal axes as needed to get the cross-tabulated spreads. The cube is initialized with Student Name as the Y axis (rows) and Term Code as the X axis (columns).



Distance Education Reports

Navigate to **Reports > Distance Education** to access the following Distance Education reports:

- Class Status Summary by Course
- Class Status Summary by Instructor
- College Student Roster
- Course Lesson Log
- Extensions Report
- High School Student Roster
- Instructors Payment History
- Lesson Tracking
- Registration by Student
- Student Balance/Course Status

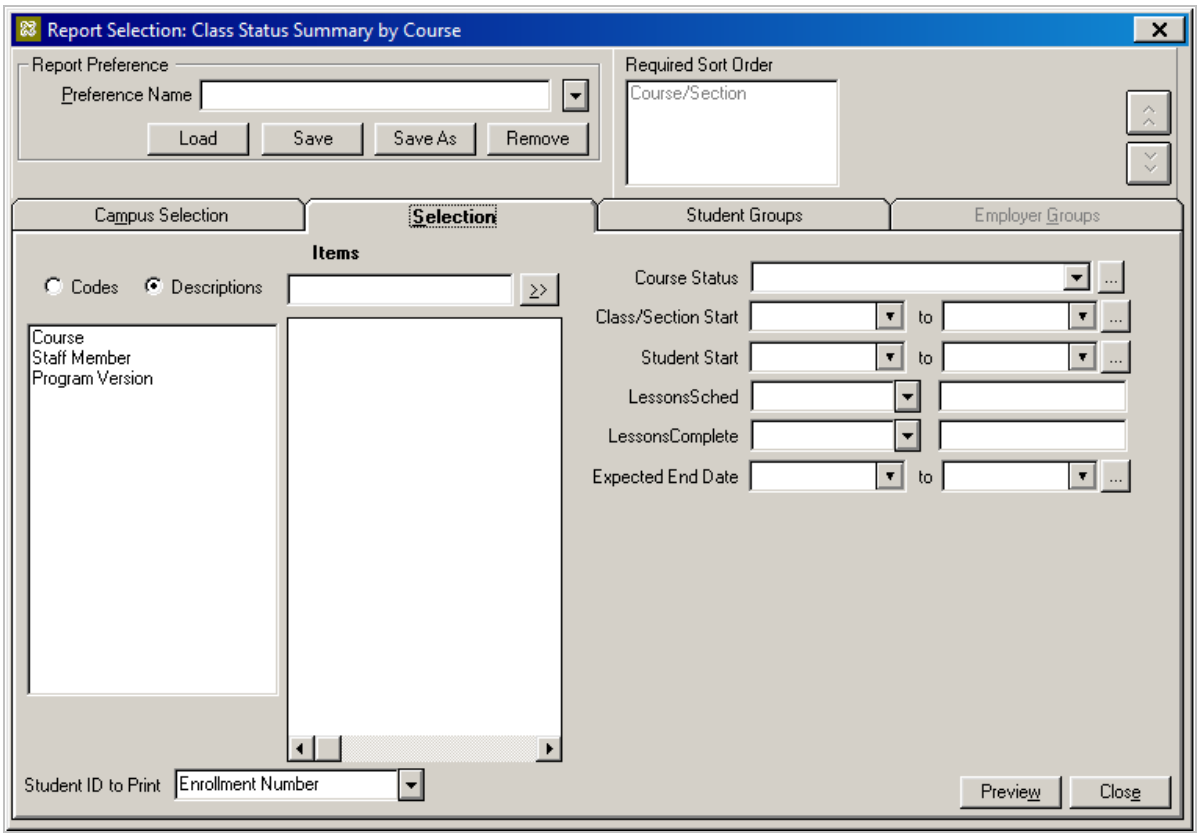
Note: The System Administrator must set up security rights to view, print, or export reports. Staff members and staff groups must be given security rights to view, print, and/or export reports. This does not apply to custom reports.

Class Status Summary by Course

This report lists students within courses/class sections and the number of lessons completed compared to the number of lessons required. The report is sorted by courses/class sections.

To run the report:

1. Navigate to **Reports > Distance Education > Class Status Summary by Course**. The Report Selection: Class Status Summary by Course form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

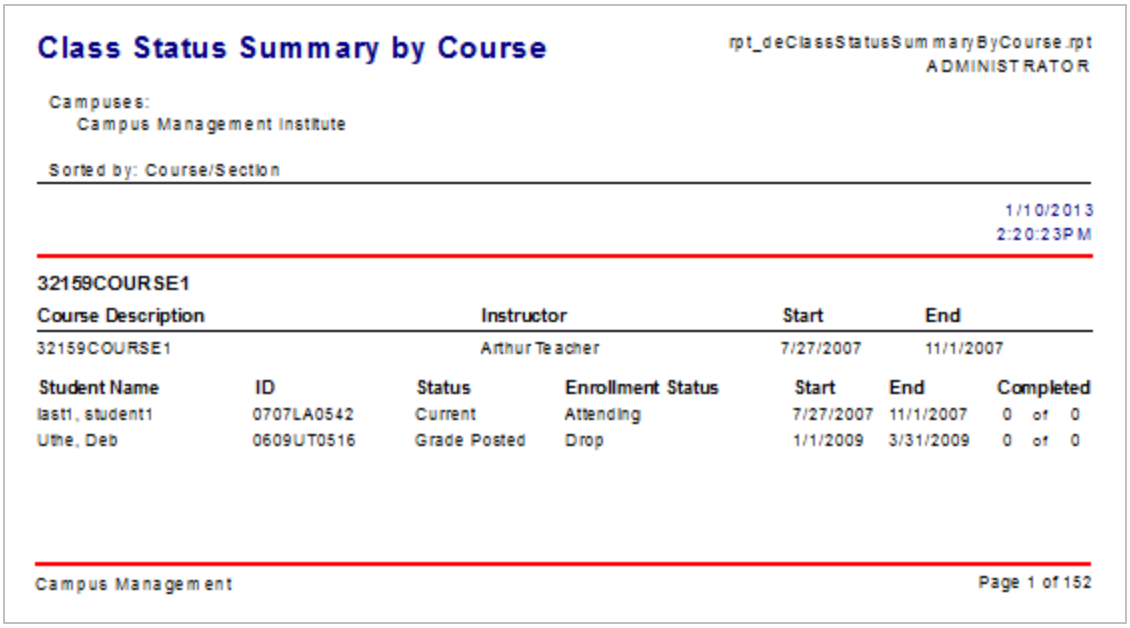


4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

The report has page breaks for every course (class section).



Class Status Summary by Course

rpt_deClassStatusSummaryByCourse.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute

Sorted by: Course/Section

1/10/2013
2:20:23PM

32159COURSE1

Course Description	Instructor	Start	End
32159COURSE1	Arthur Teacher	7/27/2007	11/1/2007

Student Name	ID	Status	Enrollment Status	Start	End	Completed
last1, student1	0707LA0542	Current	Attending	7/27/2007	11/1/2007	0 of 0
Uthe, Deb	0609UT0516	Grade Posted	Drop	1/1/2009	3/31/2009	0 of 0

Campus Management

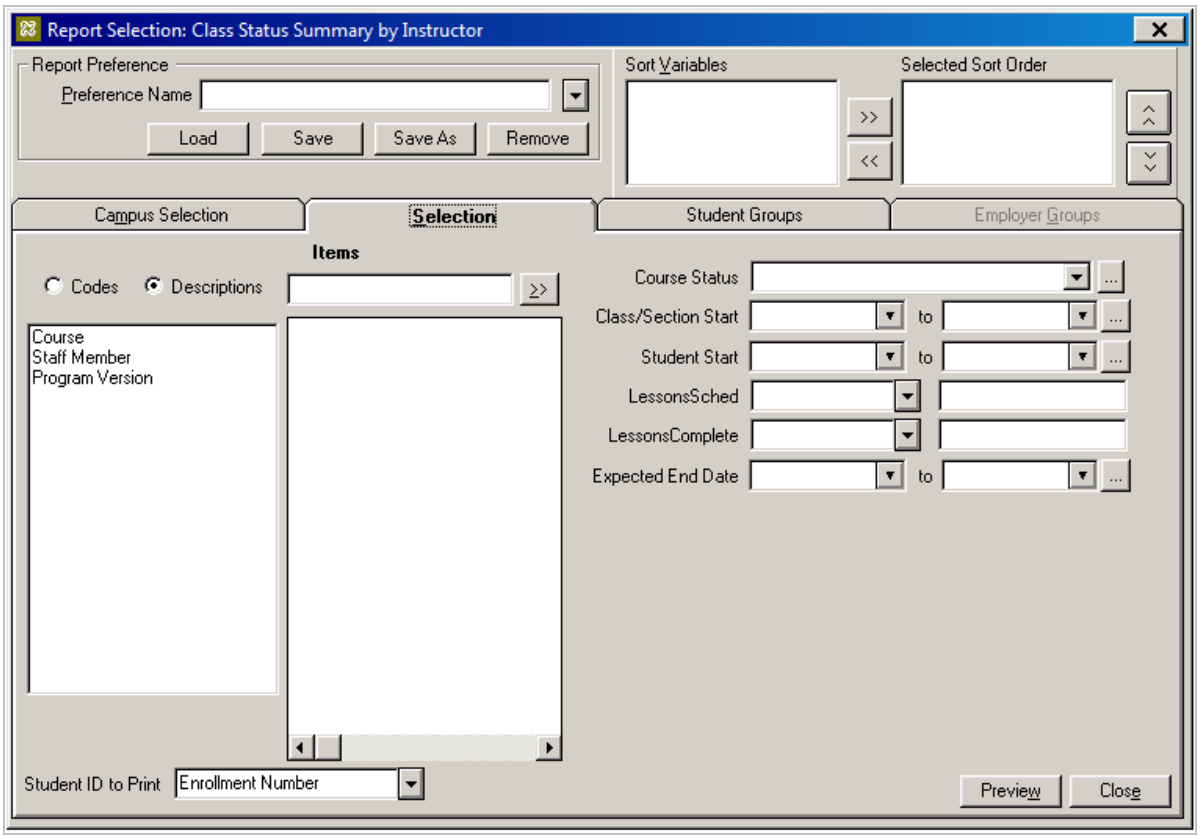
Page 1 of 152

Class Status Summary by Instructor

This report lists students within class sections and the number of lessons completed compared to the number of lessons required. The report is sorted by instructors.

To run the report:

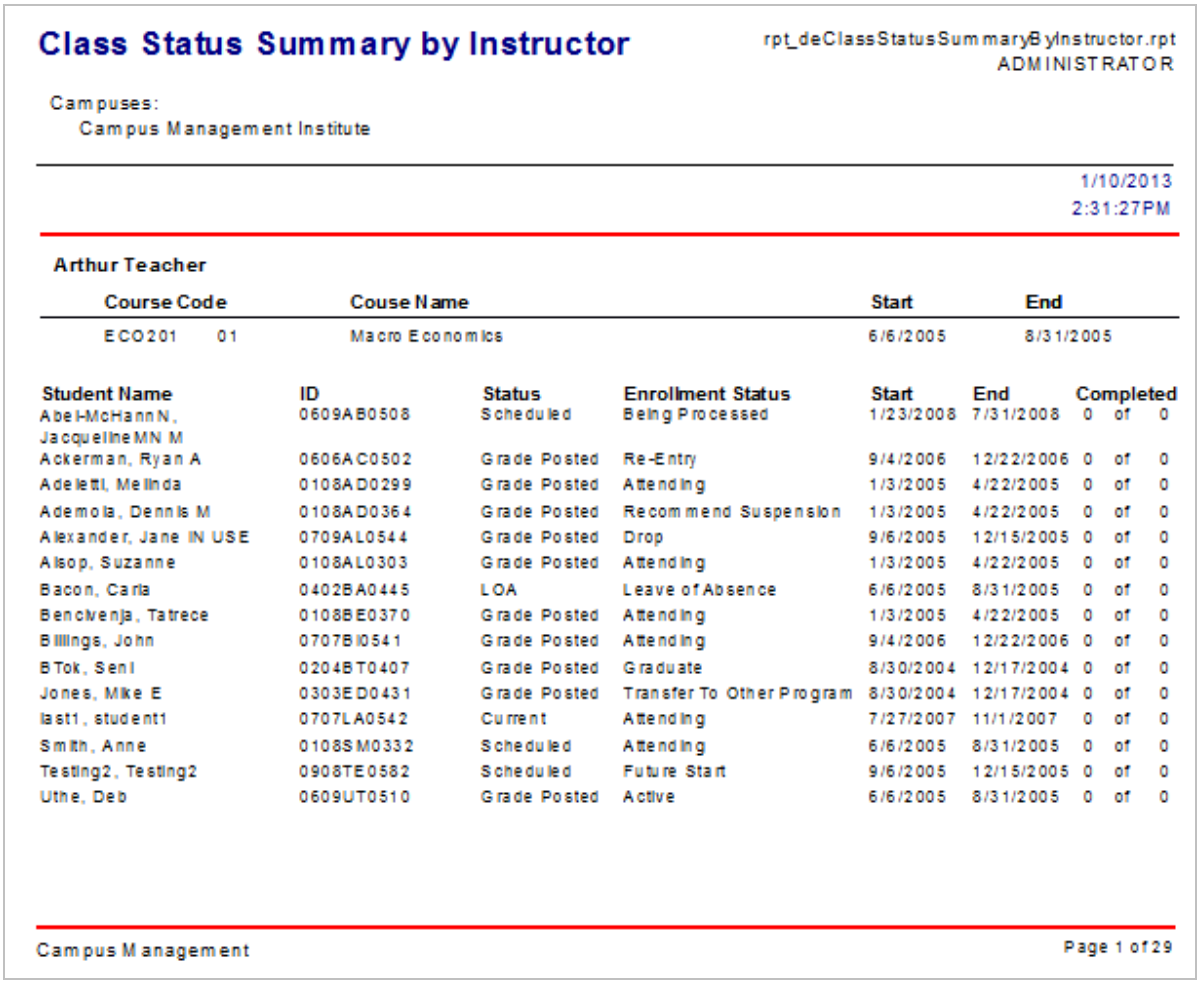
1. Navigate to **Reports > Distance Education > Class Status Summary by Instructor**. The Report Selection: Class Status Summary by Instructor form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

The report has page breaks for every instructor.



Class Status Summary by Instructor

rpt_deClassStatusSummaryByInstructor.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute

1/10/2013
2:31:27PM

Arthur Teacher

Course Code	Couse Name	Start	End
ECO201 01	Macro Economics	6/6/2005	8/31/2005

Student Name	ID	Status	Enrollment Status	Start	End	Completed
Abel-McHannN, JacquelineMN M	0609AB0508	Scheduled	Being Processed	1/23/2008	7/31/2008	0 of 0
Ackerman, Ryan A	0606AC0502	Grade Posted	Re-Entry	9/4/2006	12/22/2006	0 of 0
Adeletti, Melinda	0108AD0299	Grade Posted	Attending	1/3/2005	4/22/2005	0 of 0
Ademola, Dennis M	0108AD0364	Grade Posted	Recommend Suspension	1/3/2005	4/22/2005	0 of 0
Alexander, Jane IN USE	0709AL0544	Grade Posted	Drop	9/6/2005	12/15/2005	0 of 0
Alsop, Suzanne	0108AL0303	Grade Posted	Attending	1/3/2005	4/22/2005	0 of 0
Bacon, Carla	0402BA0445	LOA	Leave of Absence	6/6/2005	8/31/2005	0 of 0
Bencivenja, Tatrece	0108BE0370	Grade Posted	Attending	1/3/2005	4/22/2005	0 of 0
Billings, John	0707BI0541	Grade Posted	Attending	9/4/2006	12/22/2006	0 of 0
BTok, Seni	0204BT0407	Grade Posted	Graduate	8/30/2004	12/17/2004	0 of 0
Jones, Mike E	0303ED0431	Grade Posted	Transfer To Other Program	8/30/2004	12/17/2004	0 of 0
last1, student1	0707LA0542	Current	Attending	7/27/2007	11/1/2007	0 of 0
Smith, Anne	0108SM0332	Scheduled	Attending	6/6/2005	8/31/2005	0 of 0
Testing2, Testing2	0908TE0582	Scheduled	Future Start	9/6/2005	12/15/2005	0 of 0
Uthe, Deb	0609UT0510	Grade Posted	Active	6/6/2005	8/31/2005	0 of 0

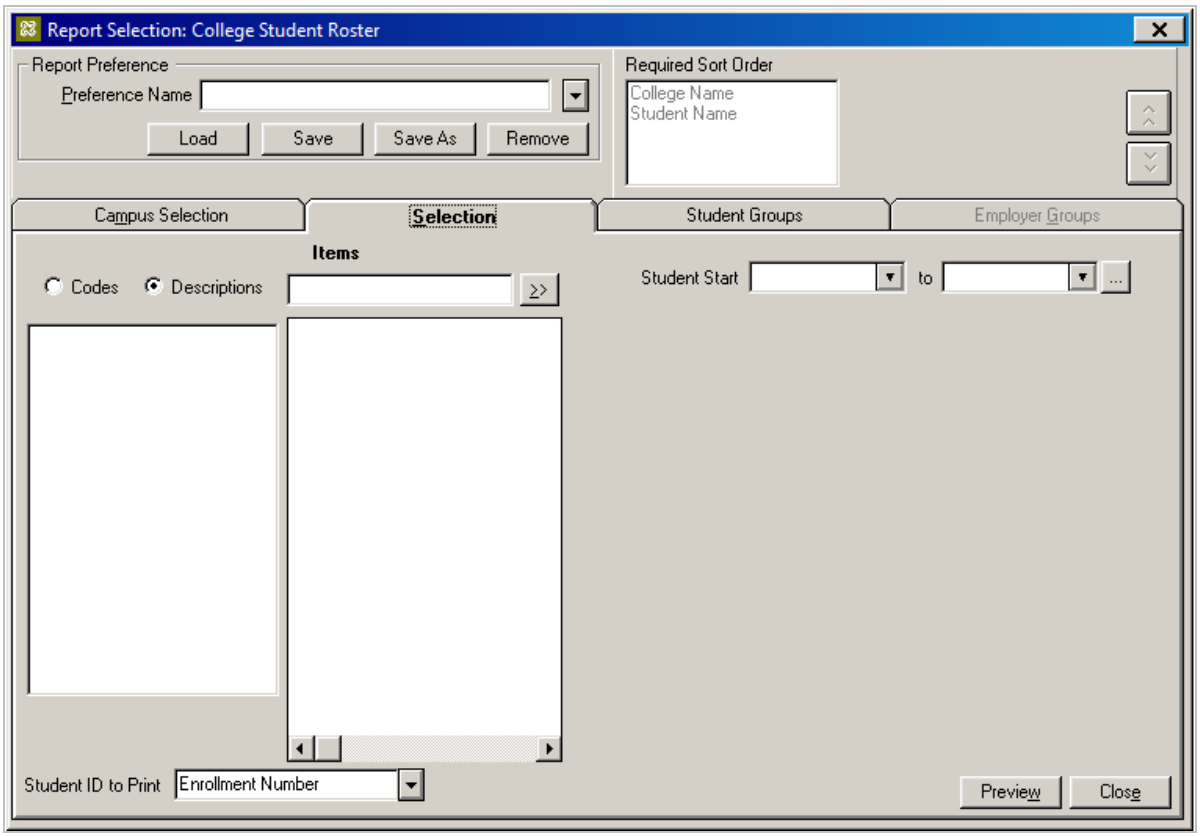
Campus Management
Page 1 of 29

College Student Roster

This report lists Distance Education students who are also students in a college. The report does not represent the total number of students from each college nor the total number of college students enrolled in distance education programs.

To run the report:

1. Navigate to **Reports > Distance Education > College Student Roster**. The Report Selection: College Student Roster form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



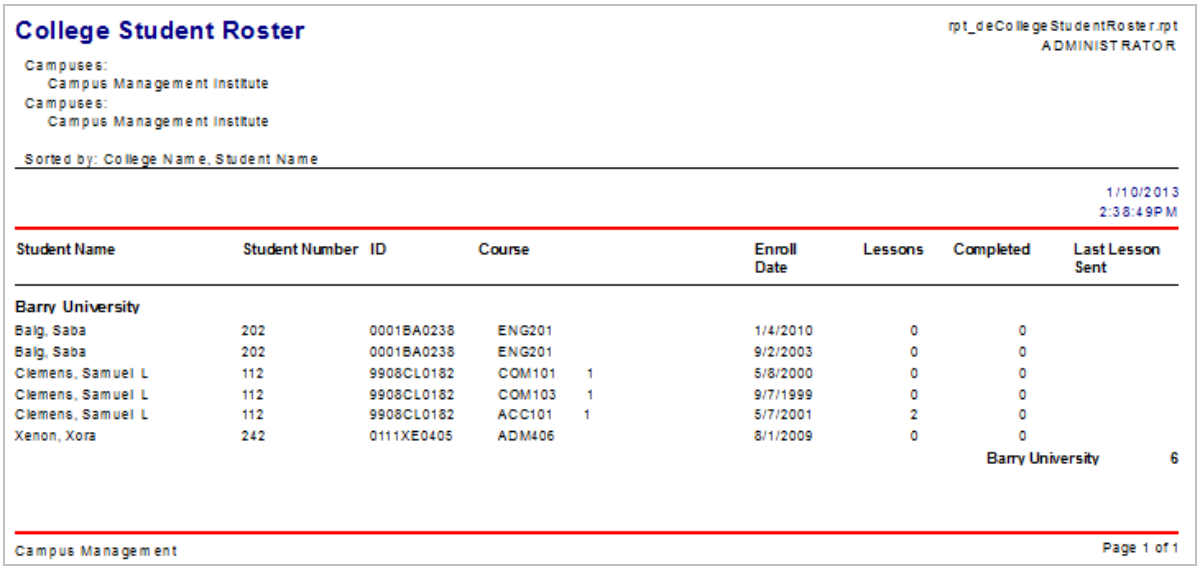
4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report shows one detail line for each student registration in a class section. Therefore, a student may be coun-

ted several times in the report.



College Student Roster

rpt_deCollegeStudentRoster.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
Campuses:
Campus Management Institute

Sorted by: College Name, Student Name

1/10/2013
2:38:49PM

Student Name	Student Number	ID	Course		Enroll Date	Lessons	Completed	Last Lesson Sent
Barry University								
Balg, Saba	202	0001BA0238	ENG201		1/4/2010	0	0	
Balg, Saba	202	0001BA0238	ENG201		9/2/2003	0	0	
Clemens, Samuel L	112	9908CL0182	COM101	1	5/8/2000	0	0	
Clemens, Samuel L	112	9908CL0182	COM103	1	9/7/1999	0	0	
Clemens, Samuel L	112	9908CL0182	ACC101	1	5/7/2001	2	0	
Xenon, Xora	242	0111XE0405	ADM406		8/1/2009	0	0	
							Barry University	**6**

Campus Management

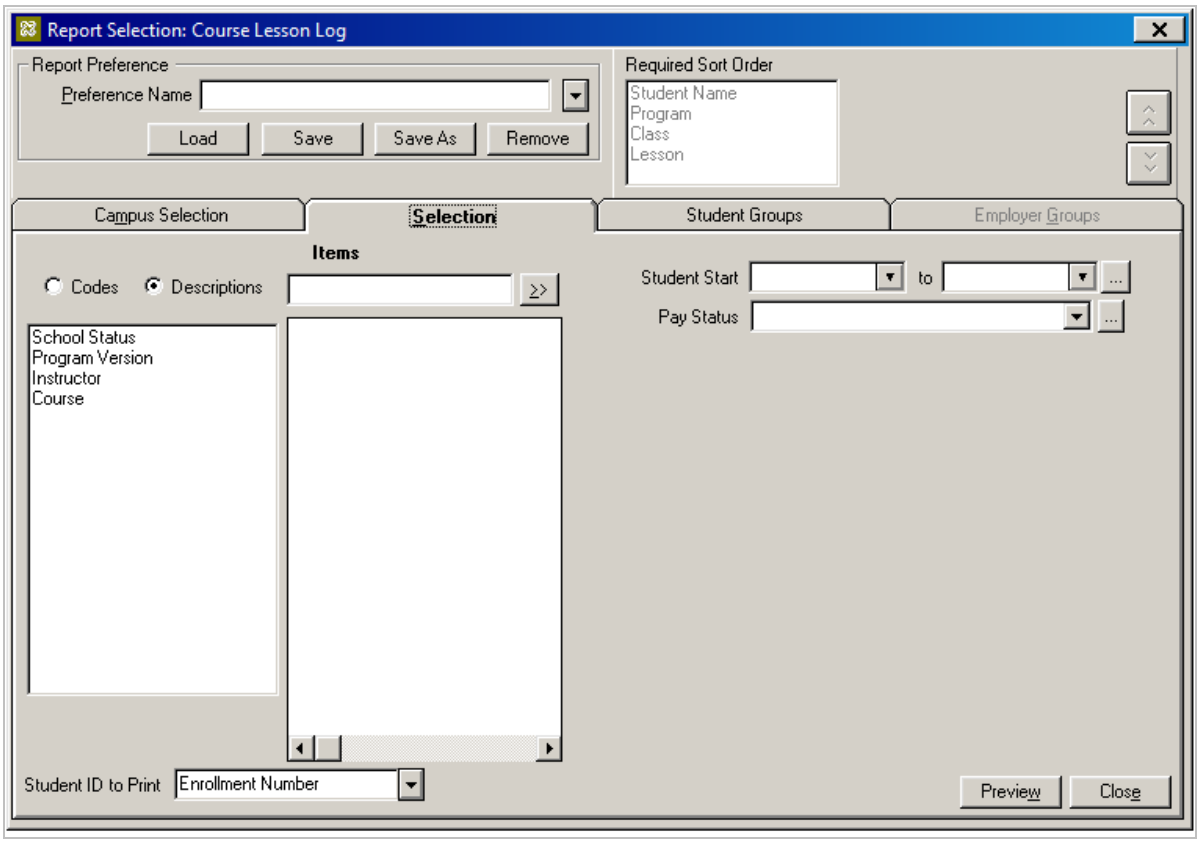
Page 1 of 1

Course Lesson Log

This report tracks lesson activity primarily between the instructor and the school administration but does include tracking of tests between the school and the student's proctor.

To run the report:

1. Navigate to **Reports > Distance Education > Course Lesson Log**. The Report Selection: Course Lesson Log form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



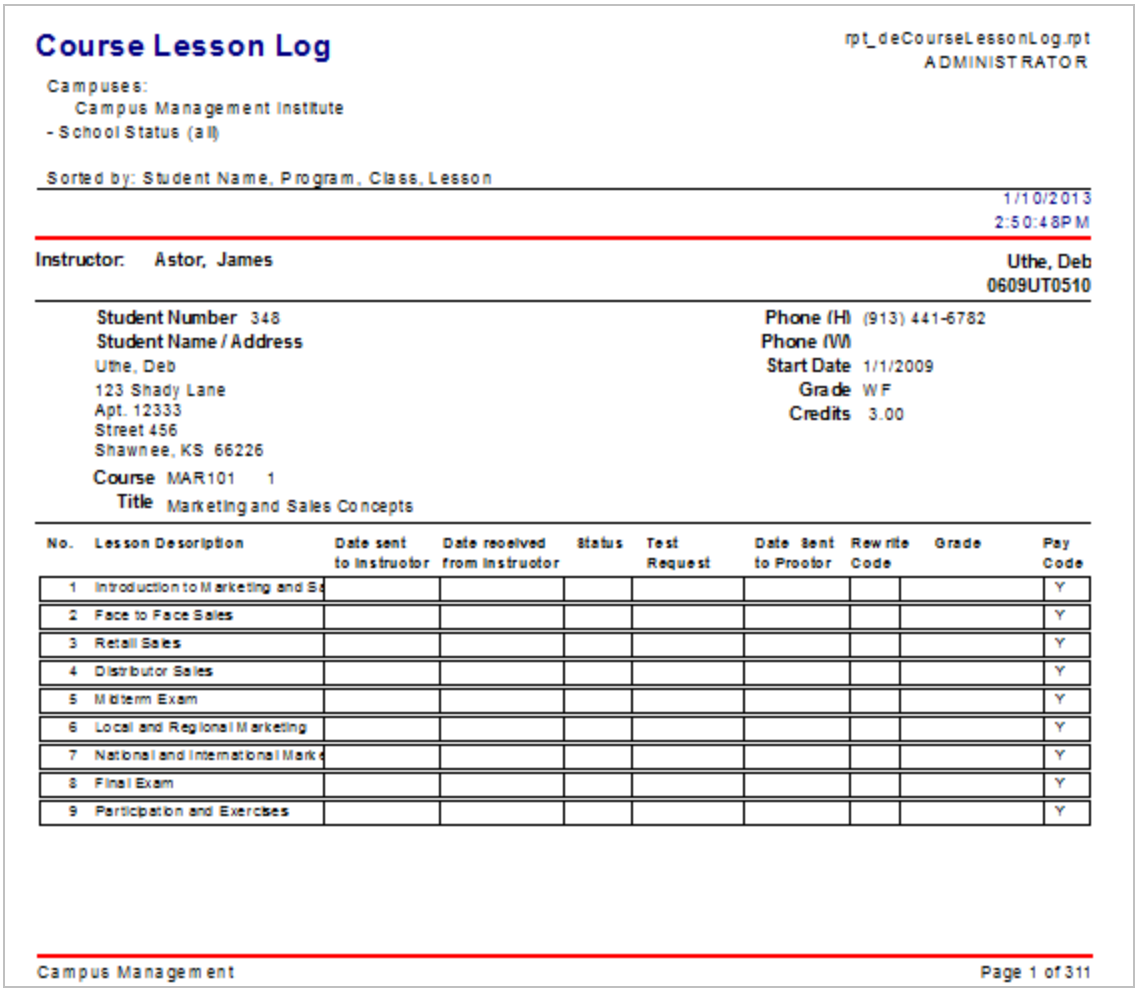
4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays a detail line for each lesson.

Page breaks occur on change of instructor, student enrollment, or course (class section).



Course Lesson Log

rpt_deCourseLessonLog.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- School Status (all)

Sorted by: Student Name, Program, Class, Lesson

1/10/2013
2:50:48PM

Instructor: Astor, James

Uthe, Deb
0609UT0510

Student Number 348
Student Name / Address
Uthe, Deb
123 Shady Lane
Apt. 12333
Street 456
Shawnee, KS 66226

Phone (H) (913) 441-6782
Phone (W)
Start Date 1/1/2009
Grade WF
Credits 3.00

Course MAR101 1
Title Marketing and Sales Concepts

No.	Lesson Description	Date sent to Instructor	Date received from Instructor	Status	Test Request	Date Sent to Proctor	Rewrite Code	Grade	Pay Code
1	Introduction to Marketing and Sa								Y
2	Face to Face Sales								Y
3	Retail Sales								Y
4	Distributor Sales								Y
5	Midterm Exam								Y
6	Local and Regional Marketing								Y
7	National and International Marke								Y
8	Final Exam								Y
9	Participation and Exercises								Y

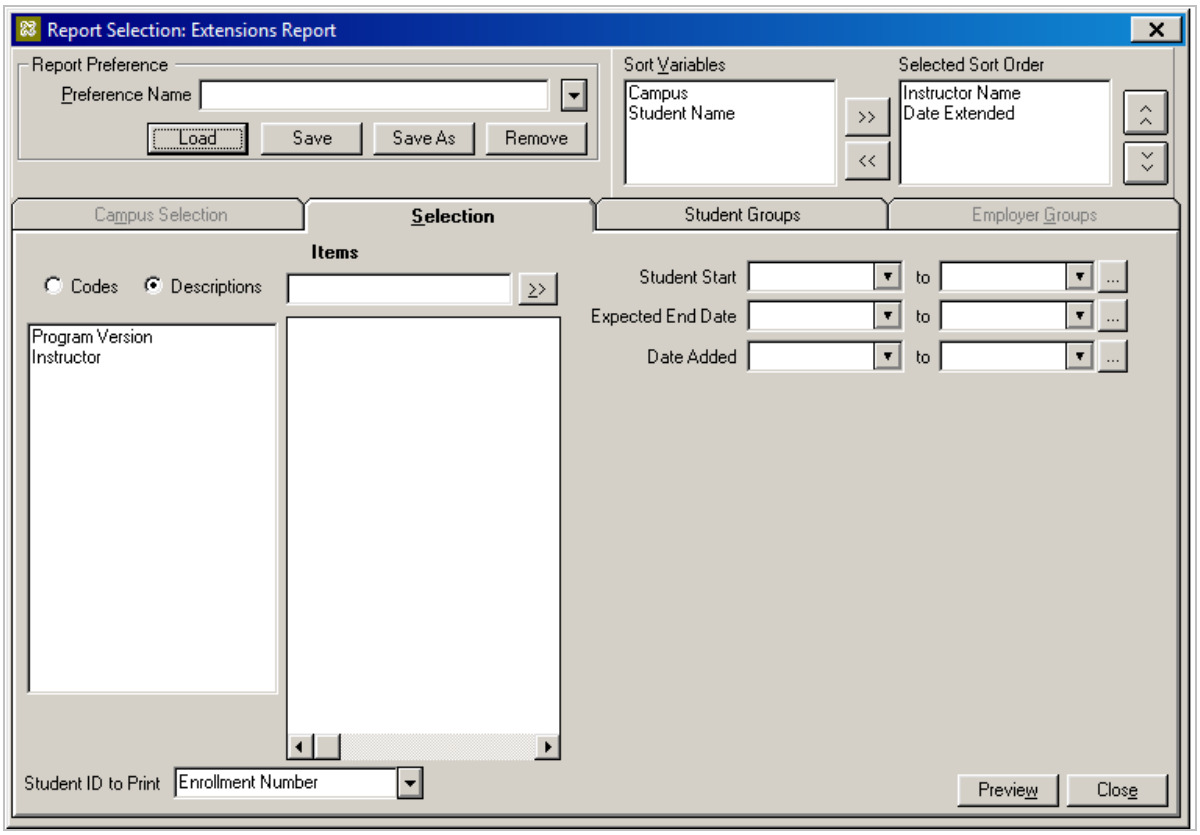
Campus Management
Page 1 of 311

Extensions Report

This report lists extensions of the completion date for Distance Education courses. There may be a charge to the student when an extension is granted.

To run the report:

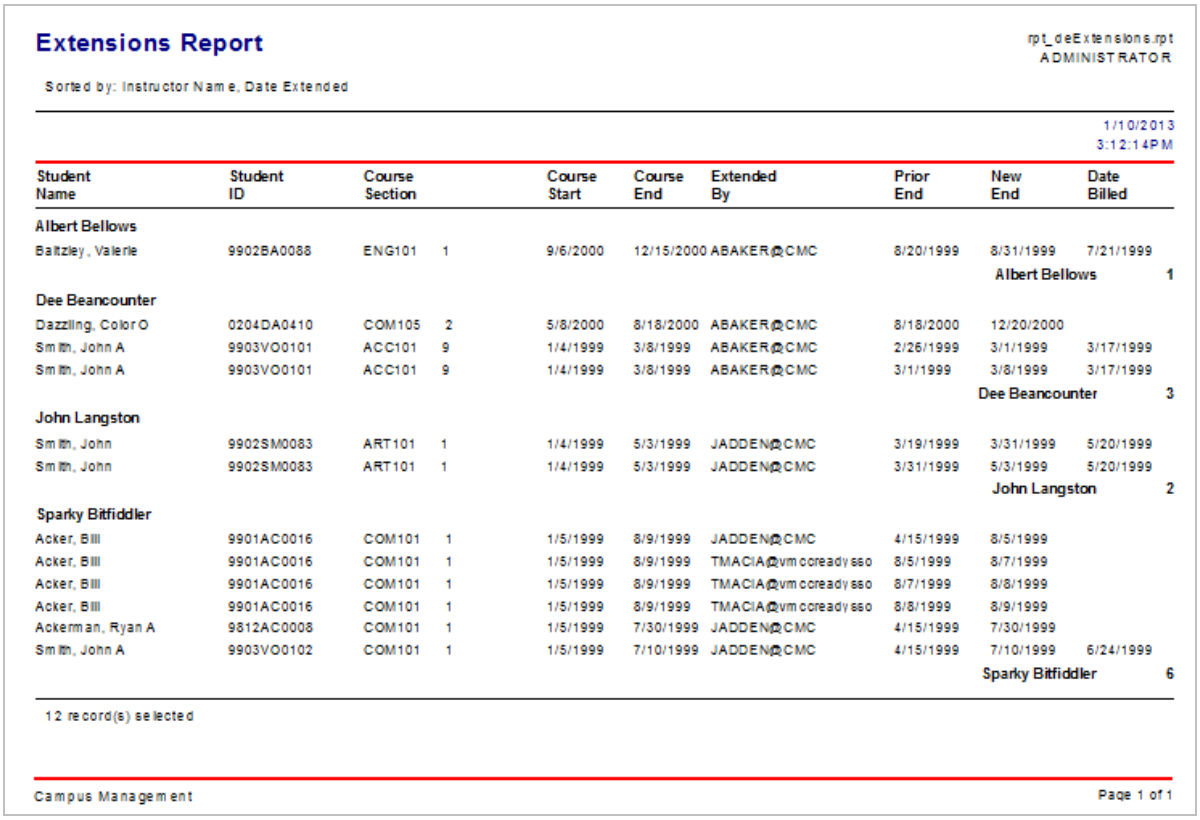
1. Navigate to **Reports > Distance Education > Extensions Report**. The Report Selection: Extensions Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.



Extensions Report

rpt_deExtensions.rpt
ADMINISTRATOR

Sorted by: Instructor Name, Date Extended

1/10/2013
3:12:14PM

Student Name	Student ID	Course Section		Course Start	Course End	Extended By	Prior End	New End	Date Billed	
Albert Bellows										
Baltzley, Valerie	9902BA0088	ENG101	1	9/6/2000	12/15/2000	ABAKER@CMC	8/20/1999	8/31/1999	7/21/1999	
								Albert Bellows		**1**
Dee Beancounter										
Dazzling, Color O	0204DA0410	COM105	2	5/8/2000	8/18/2000	ABAKER@CMC	8/18/2000	12/20/2000		
Smith, John A	9903VO0101	ACC101	9	1/4/1999	3/8/1999	ABAKER@CMC	2/26/1999	3/1/1999	3/17/1999	
Smith, John A	9903VO0101	ACC101	9	1/4/1999	3/8/1999	ABAKER@CMC	3/1/1999	3/8/1999	3/17/1999	
								Dee Beancounter		**3**
John Langston										
Smith, John	9902SM0083	ART101	1	1/4/1999	5/3/1999	JADDEN@CMC	3/19/1999	3/31/1999	5/20/1999	
Smith, John	9902SM0083	ART101	1	1/4/1999	5/3/1999	JADDEN@CMC	3/31/1999	5/3/1999	5/20/1999	
								John Langston		**2**
Sparky Bitfiddler										
Acker, Bill	9901AC0016	COM101	1	1/5/1999	8/9/1999	JADDEN@CMC	4/15/1999	8/5/1999		
Acker, Bill	9901AC0016	COM101	1	1/5/1999	8/9/1999	TMACIA@vmcoreadysso	8/5/1999	8/7/1999		
Acker, Bill	9901AC0016	COM101	1	1/5/1999	8/9/1999	TMACIA@vmcoreadysso	8/7/1999	8/8/1999		
Acker, Bill	9901AC0016	COM101	1	1/5/1999	8/9/1999	TMACIA@vmcoreadysso	8/8/1999	8/9/1999		
Ackerman, Ryan A	9812AC0008	COM101	1	1/5/1999	7/30/1999	JADDEN@CMC	4/15/1999	7/30/1999		
Smith, John A	9903VO0102	COM101	1	1/5/1999	7/10/1999	JADDEN@CMC	4/15/1999	7/10/1999	6/24/1999	
								Sparky Bitfiddler		**6**

12 record(s) selected

Campus Management

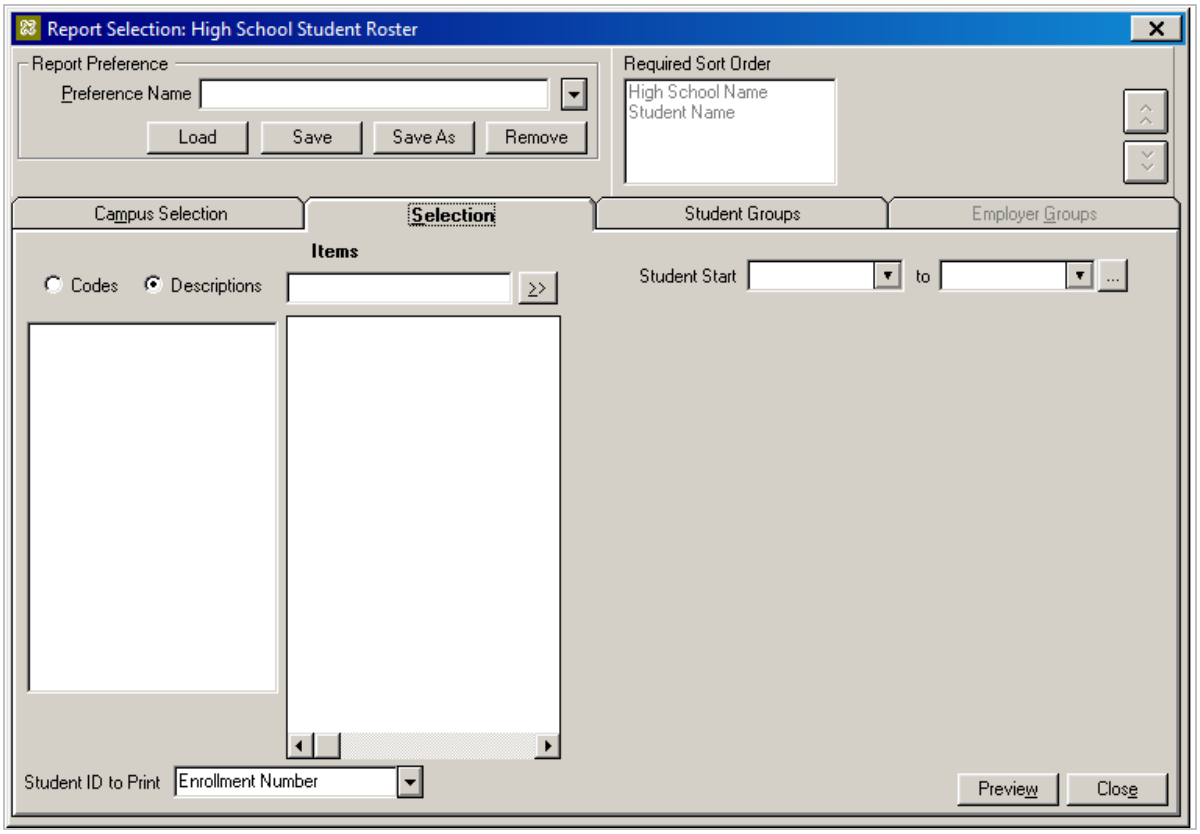
Page 1 of 1

High School Student Roster

This report is a list of Distance Education students who are also students in a high school. The report does not represent the total number of students from each high school nor the total number of high school students enrolled in distance education programs. The report is grouped by student so that the students' names appear only once.

To run the report:

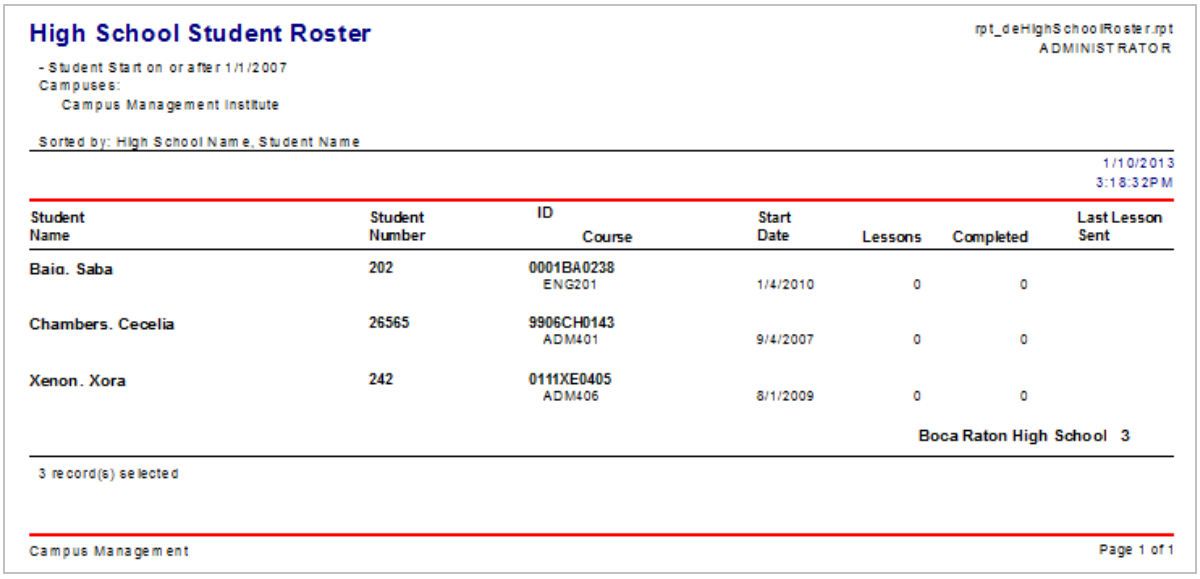
1. Navigate to **Reports > Distance Education > High School Student Roster**. The Report Selection: High School Student Roster form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

The report shows one detail line for each student registration in a course/class section.



High School Student Roster

rpt_deHighSchoolRoster.rpt
ADMINISTRATOR

- Student Start on or after 1/1/2007
Campuses:
Campus Management Institute

Sorted by: High School Name, Student Name

1/10/2013
3:18:32PM

Student Name	Student Number	ID / Course	Start Date	Lessons	Completed	Last Lesson Sent
Baio. Saba	202	0001BA0238 ENG201	1/4/2010	0	0	
Chambers. Cecelia	26565	9906CH0143 ADM401	9/4/2007	0	0	
Xenon. Xora	242	0111XE0405 ADM406	8/1/2009	0	0	

Boca Raton High School 3

3 record(s) selected

Campus Management

Page 1 of 1

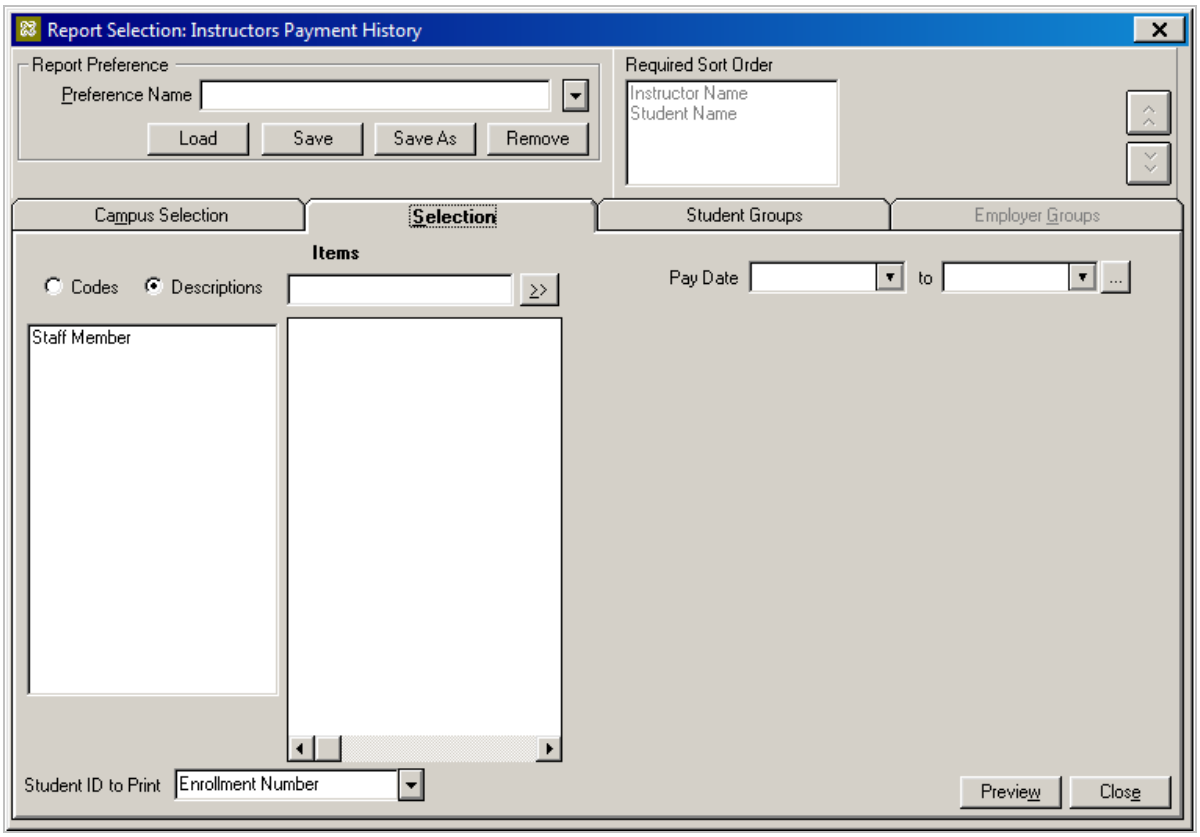
Instructors Payment History

This report lists payments paid to instructors by date by instructor. Payment data is for distance education activity including grading of lessons and exams, courses, and course revisions.

Payments depend on Distance Education Setup for payment schedules per instructor, course, lesson, exam, and bonuses for prompt responses. Payments for course revisions are recorded on a case by case basis.

To run the report:

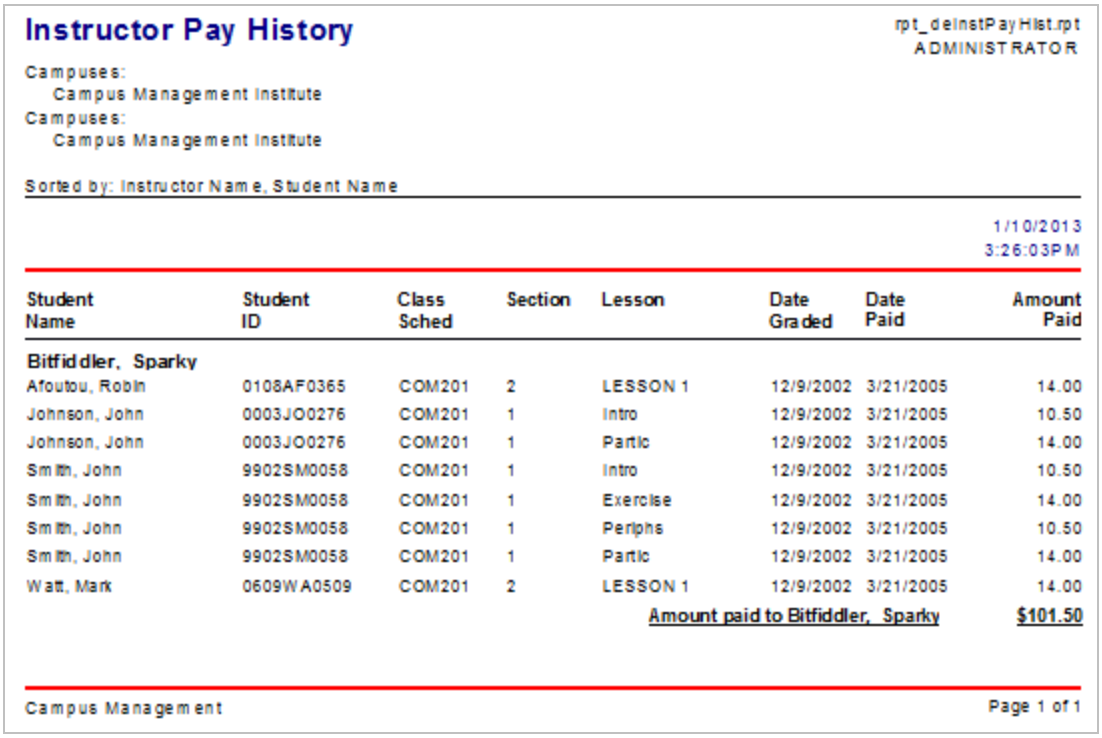
1. Navigate to **Reports > Distance Education > Instructors Payment History**. The Report Selection: Instructors Payment History form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.



Instructor Pay History

rpt_deInstPayHist.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
Campuses:
Campus Management Institute

Sorted by: Instructor Name, Student Name

1/10/2013
3:26:03PM

Student Name	Student ID	Class Sched	Section	Lesson	Date Graded	Date Paid	Amount Paid
Bitfiddler, Sparky							
Afoutou, Robin	0108AF0365	COM201	2	LESSON 1	12/9/2002	3/21/2005	14.00
Johnson, John	0003JO0276	COM201	1	Intro	12/9/2002	3/21/2005	10.50
Johnson, John	0003JO0276	COM201	1	Partic	12/9/2002	3/21/2005	14.00
Smith, John	9902SM0058	COM201	1	Intro	12/9/2002	3/21/2005	10.50
Smith, John	9902SM0058	COM201	1	Exercise	12/9/2002	3/21/2005	14.00
Smith, John	9902SM0058	COM201	1	Periphs	12/9/2002	3/21/2005	10.50
Smith, John	9902SM0058	COM201	1	Partic	12/9/2002	3/21/2005	14.00
Watt, Mark	0609WA0509	COM201	2	LESSON 1	12/9/2002	3/21/2005	14.00
				Amount paid to Bitfiddler, Sparky			$101.50

Campus Management

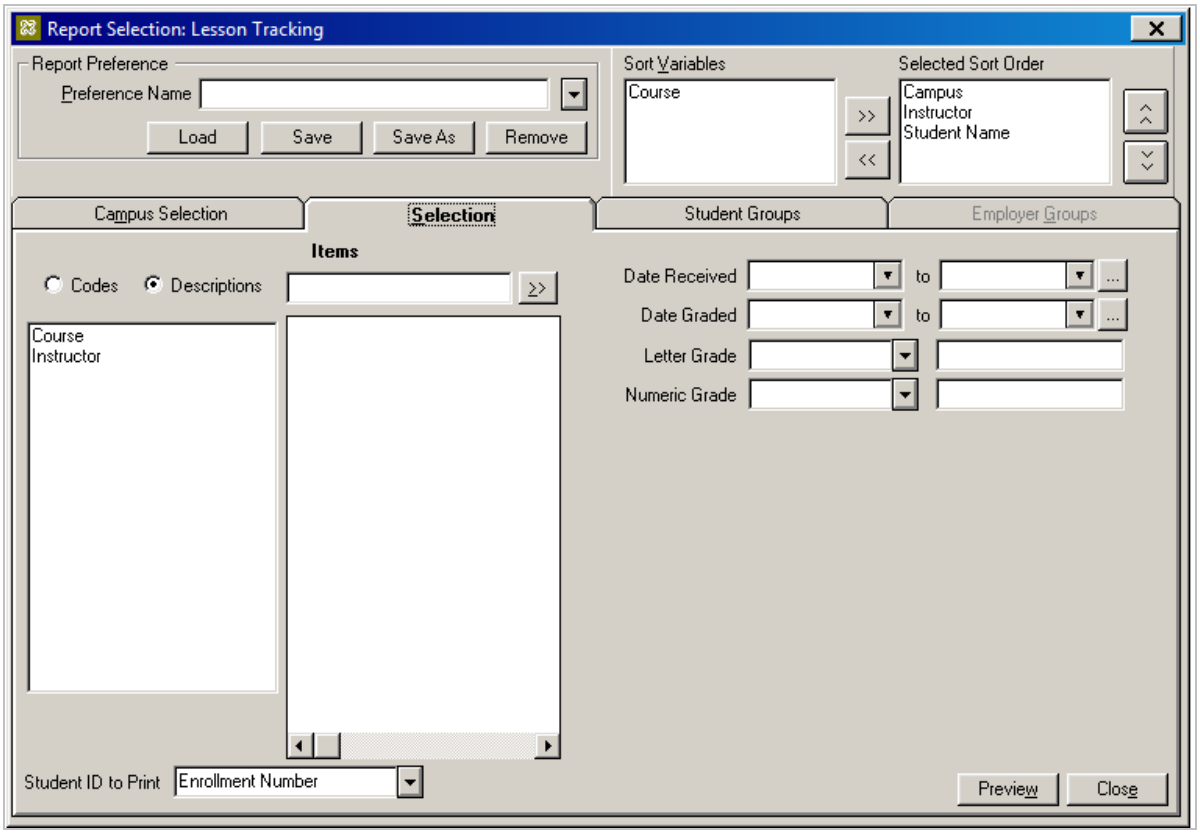
Page 1 of 1

Lesson Tracking

This report is used to determine the status of course lessons at the time of the report.

To run the report:

1. Navigate to **Reports > Distance Education > Lesson Tracking**. The Report Selection: Lesson Tracking form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

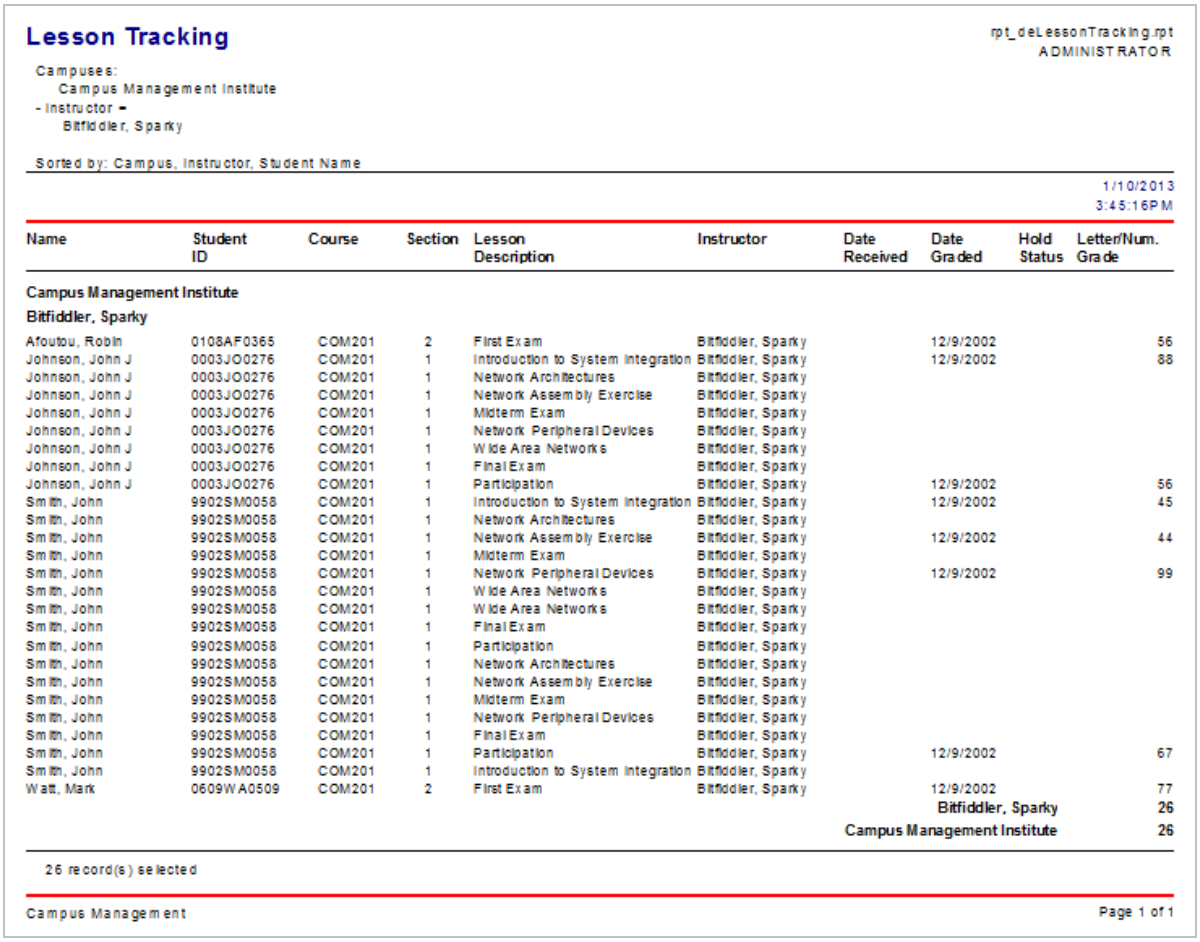
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The detail lines on the report include:

   - Student Name
   - Student ID
   - Course Code
   - Section Code
   - Lesson Description
   - Instructor

- Date Received
- Date Graded
- Hold Status
- Letter Grade/Numeric Grade

The Letter Grade is displayed as a comparison variable.



Lesson Tracking

rpt_deLessonTracking.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- Instructor -
Bitfiddler, Sparky

Sorted by: Campus, Instructor, Student Name

1/10/2013
3:45:16PM

Name	Student ID	Course	Section	Lesson Description	Instructor	Date Received	Date Graded	Hold Status	Letter/Num. Grade
Campus Management Institute									
Bitfiddler, Sparky									
Afoutou, Robin	0108AF0365	COM201	2	First Exam	Bitfiddler, Sparky		12/9/2002		56
Johnson, John J	0003JO0276	COM201	1	Introduction to System Integration	Bitfiddler, Sparky		12/9/2002		88
Johnson, John J	0003JO0276	COM201	1	Network Architectures	Bitfiddler, Sparky				
Johnson, John J	0003JO0276	COM201	1	Network Assembly Exercise	Bitfiddler, Sparky				
Johnson, John J	0003JO0276	COM201	1	Midterm Exam	Bitfiddler, Sparky				
Johnson, John J	0003JO0276	COM201	1	Network Peripheral Devices	Bitfiddler, Sparky				
Johnson, John J	0003JO0276	COM201	1	Wide Area Networks	Bitfiddler, Sparky				
Johnson, John J	0003JO0276	COM201	1	Final Exam	Bitfiddler, Sparky				
Johnson, John J	0003JO0276	COM201	1	Participation	Bitfiddler, Sparky		12/9/2002		56
Smith, John	9902SM0058	COM201	1	Introduction to System Integration	Bitfiddler, Sparky		12/9/2002		45
Smith, John	9902SM0058	COM201	1	Network Architectures	Bitfiddler, Sparky				
Smith, John	9902SM0058	COM201	1	Network Assembly Exercise	Bitfiddler, Sparky		12/9/2002		44
Smith, John	9902SM0058	COM201	1	Midterm Exam	Bitfiddler, Sparky				
Smith, John	9902SM0058	COM201	1	Network Peripheral Devices	Bitfiddler, Sparky		12/9/2002		99
Smith, John	9902SM0058	COM201	1	Wide Area Networks	Bitfiddler, Sparky				
Smith, John	9902SM0058	COM201	1	Wide Area Networks	Bitfiddler, Sparky				
Smith, John	9902SM0058	COM201	1	Final Exam	Bitfiddler, Sparky				
Smith, John	9902SM0058	COM201	1	Participation	Bitfiddler, Sparky				
Smith, John	9902SM0058	COM201	1	Network Architectures	Bitfiddler, Sparky				
Smith, John	9902SM0058	COM201	1	Network Assembly Exercise	Bitfiddler, Sparky				
Smith, John	9902SM0058	COM201	1	Midterm Exam	Bitfiddler, Sparky				
Smith, John	9902SM0058	COM201	1	Network Peripheral Devices	Bitfiddler, Sparky				
Smith, John	9902SM0058	COM201	1	Final Exam	Bitfiddler, Sparky				
Smith, John	9902SM0058	COM201	1	Participation	Bitfiddler, Sparky		12/9/2002		67
Smith, John	9902SM0058	COM201	1	Introduction to System Integration	Bitfiddler, Sparky				
Watt, Mark	0609WA0509	COM201	2	First Exam	Bitfiddler, Sparky		12/9/2002		77
								Bitfiddler, Sparky	**26**
								Campus Management Institute	**26**

26 record(s) selected

Campus Management

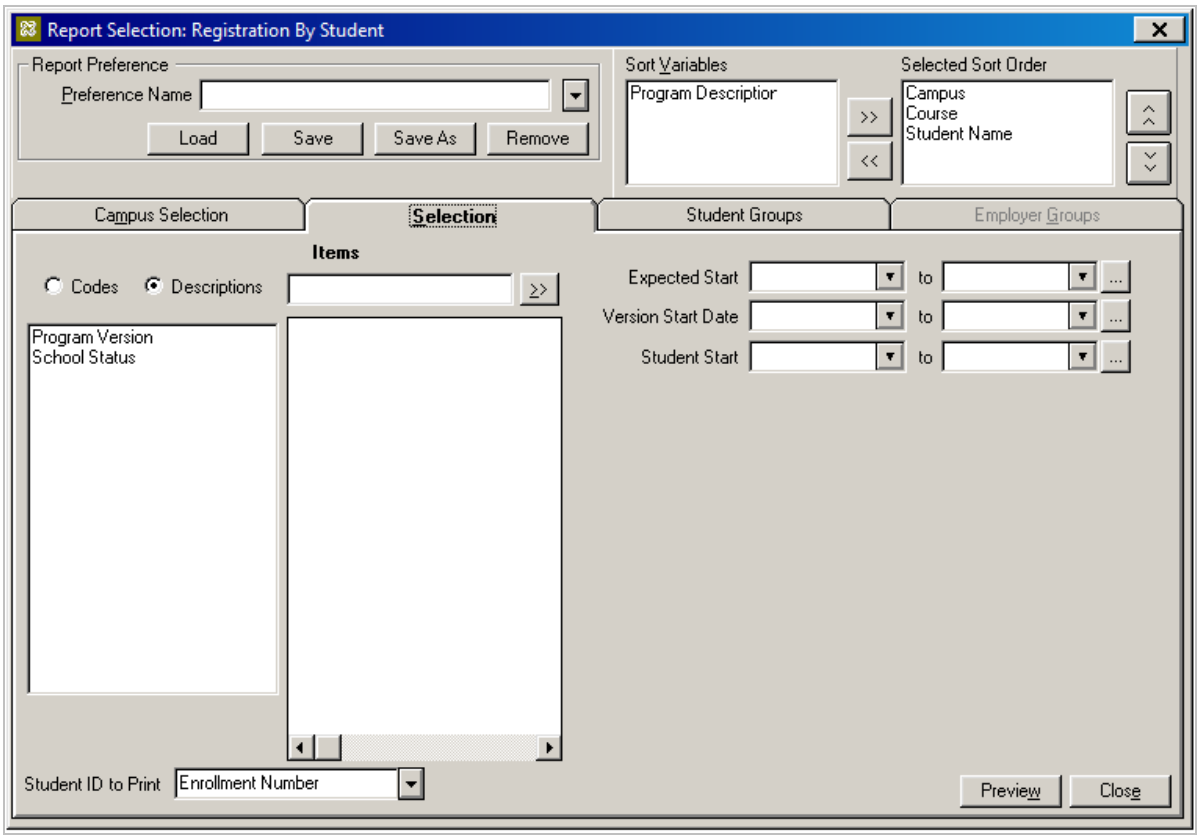
Page 1 of 1

Registration by Student

The registration report displays a list of students by course code. By sorting it differently, it can also show a list of courses by student.

To run the report:

1. Navigate to **Reports > Distance Education > Registration by Student**. The Report Selection: Registration by Student form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

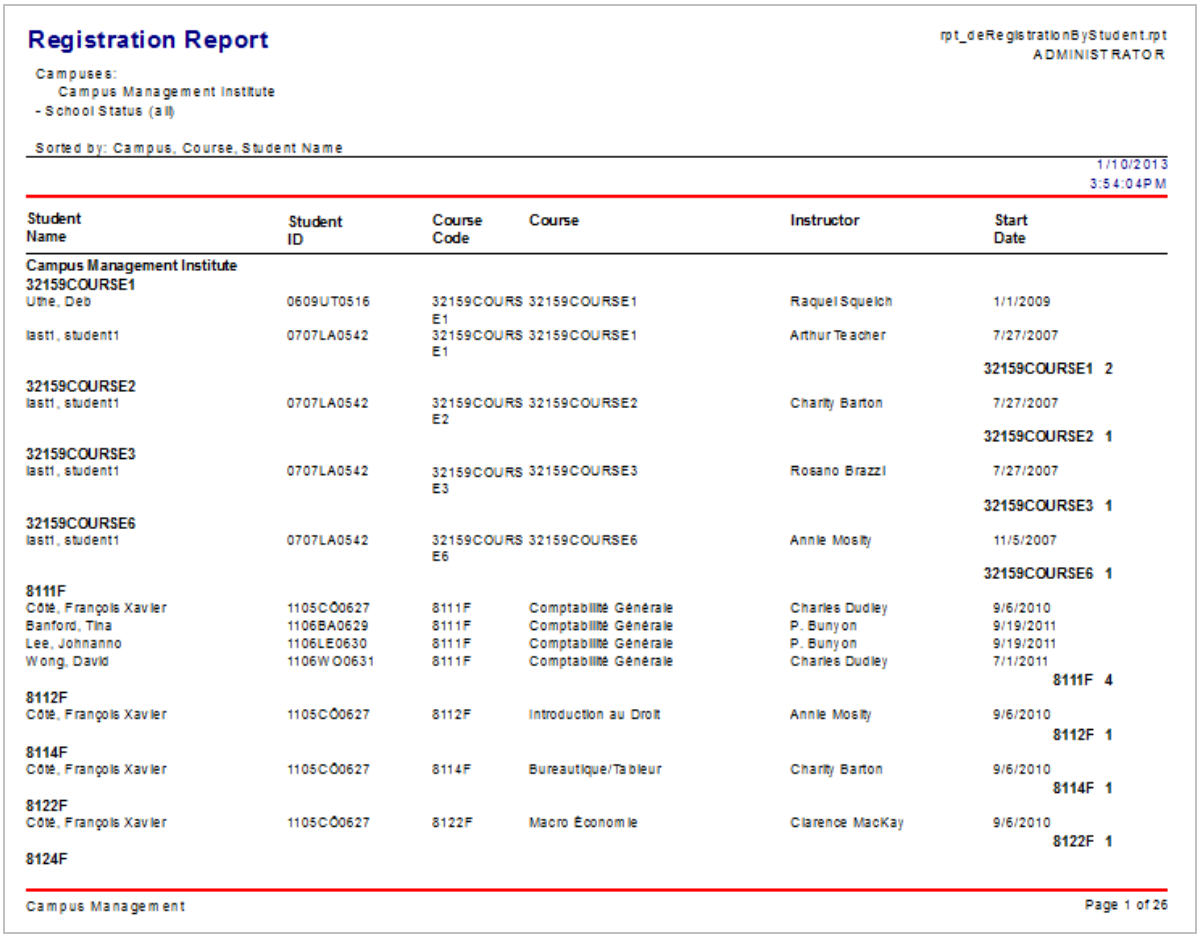
   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   Detail lines on the report include

   - Student Name
   - Student ID
   - Course Code
   - Course Description

- Instructor
- Start Date



Registration Report

rpt_deRegistrationByStudent.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- School Status (all)

Sorted by: Campus, Course, Student Name

1/10/2013
3:54:04PM

Student Name	Student ID	Course Code	Course	Instructor	Start Date
Campus Management Institute					
32159COURSE1					
Uthe, Deb	0609UT0516	32159COURSE1	32159COURSE1	Raquel Squelch	1/1/2009
last1, student1	0707LA0542	32159COURSE1	32159COURSE1	Arthur Teacher	7/27/2007
					32159COURSE1 2
32159COURSE2					
last1, student1	0707LA0542	32159COURSE2	32159COURSE2	Charity Barton	7/27/2007
					32159COURSE2 1
32159COURSE3					
last1, student1	0707LA0542	32159COURSE3	32159COURSE3	Rosano Brazzi	7/27/2007
					32159COURSE3 1
32159COURSE6					
last1, student1	0707LA0542	32159COURSE6	32159COURSE6	Annie Mosity	11/5/2007
					32159COURSE6 1
8111F					
Côté, François Xavier	1105CÔ0627	8111F	Comptabilité Générale	Charles Dudley	9/6/2010
Banford, Tina	1106BA0629	8111F	Comptabilité Générale	P. Bunyon	9/19/2011
Lee, Johnanno	1106LE0630	8111F	Comptabilité Générale	P. Bunyon	9/19/2011
Wong, David	1106WO0631	8111F	Comptabilité Générale	Charles Dudley	7/1/2011
					8111F 4
8112F					
Côté, François Xavier	1105CÔ0627	8112F	Introduction au Droit	Annie Mosity	9/6/2010
					8112F 1
8114F					
Côté, François Xavier	1105CÔ0627	8114F	Bureautique/Tableur	Charity Barton	9/6/2010
					8114F 1
8122F					
Côté, François Xavier	1105CÔ0627	8122F	Macro Économie	Clarence MacKay	9/6/2010
					8122F 1
8124F					

Campus Management

Page 1 of 26

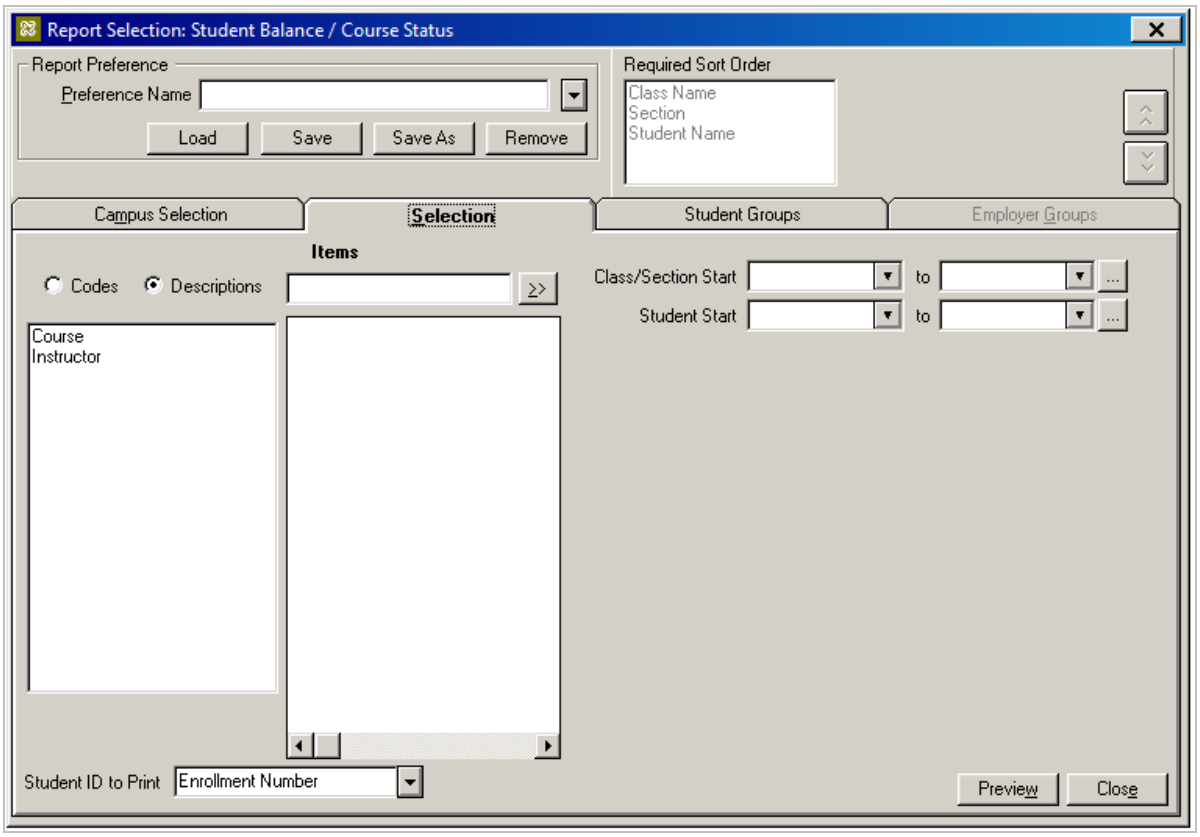
Student Balance / Course Status

This report lists the students' balance for each class/section.

Note: The number of lessons for a given course can vary by class section. Also, the term "lessons" in the context of this report encompasses lessons, exams, and book reports. The lesson/exam/book report plan for a class section is determined under Daily > Academic Records > Class Scheduling.

To run the report:

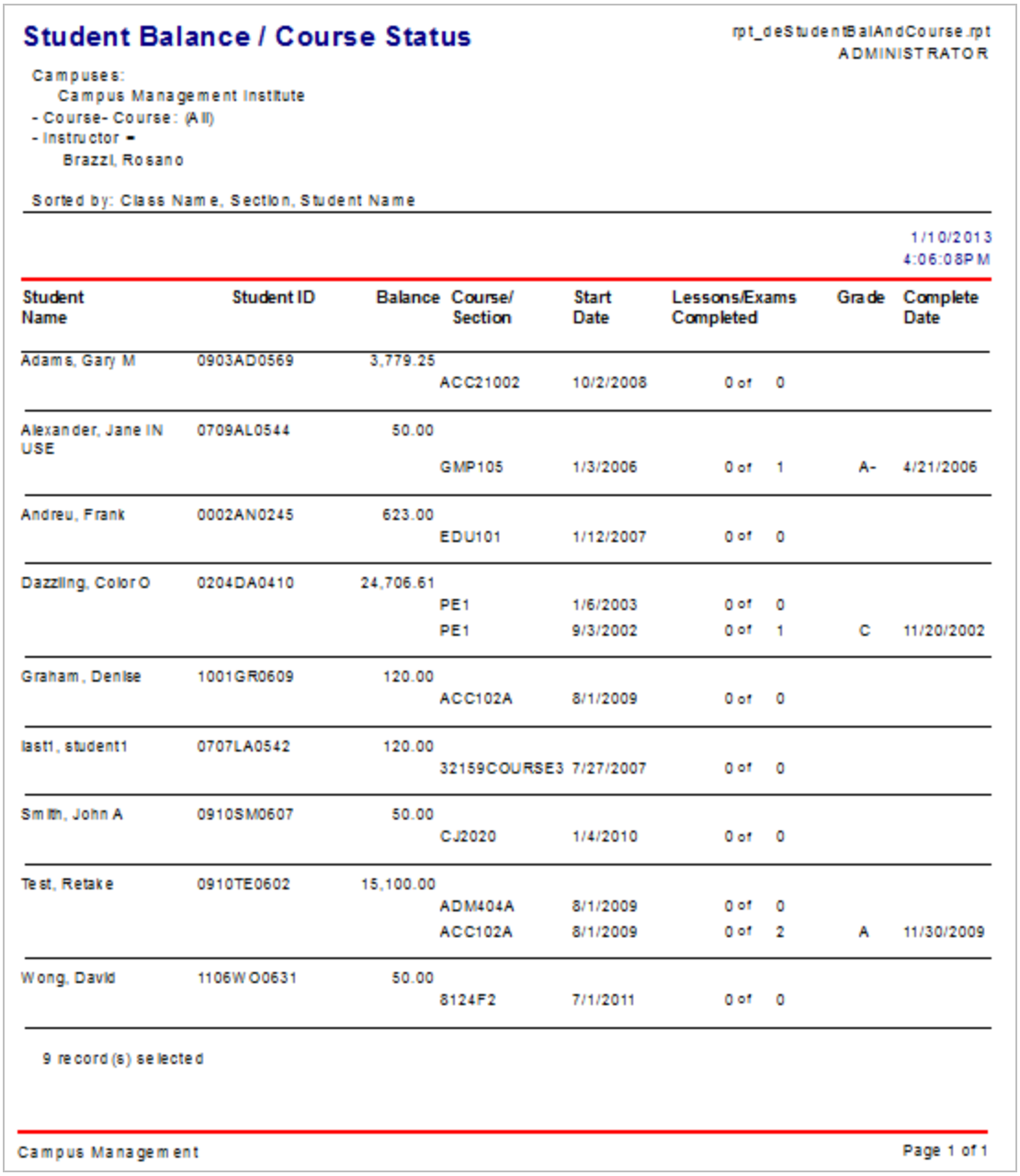
1. Navigate to **Reports > Distance Education > Student Balance / Course Status**. The Report Selection: Student Balance / Course Status form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.



Student Balance / Course Status

rpt_deStudentBalAndCourse.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- Course- Course: (All)
- Instructor -
Brazzi, Rosano

Sorted by: Class Name, Section, Student Name

1/10/2013
4:06:08PM

Student Name	Student ID	Balance	Course/ Section	Start Date	Lessons/Exams Completed	Grade	Complete Date
Adams, Gary M	0903AD0569	3,779.25					
			ACC21002	10/2/2008	0 of 0		
Alexander, Jane IN USE	0709AL0544	50.00					
			GMP105	1/3/2006	0 of 1	A-	4/21/2006
Andreu, Frank	0002AN0245	623.00					
			EDU101	1/12/2007	0 of 0		
Dazzling, Color O	0204DA0410	24,706.61					
			PE1	1/6/2003	0 of 0		
			PE1	9/3/2002	0 of 1	C	11/20/2002
Graham, Denise	1001GR0609	120.00					
			ACC102A	8/1/2009	0 of 0		
last1, student1	0707LA0542	120.00					
			32159COURSE3	7/27/2007	0 of 0		
Smith, John A	0910SM0607	50.00					
			CJ2020	1/4/2010	0 of 0		
Test, Retake	0910TE0602	15,100.00					
			ADM404A	8/1/2009	0 of 0		
			ACC102A	8/1/2009	0 of 2	A	11/30/2009
Wong, David	1106WO0631	50.00					
			8124F2	7/1/2011	0 of 0		

9 record(s) selected

Campus Management

Page 1 of 1

Career Services Reports

Navigate to **Reports > Career Services** to access the following Career Services reports:

- Certifications
- Employer Master Listing
- Job Conversion Rate
- Job List (Single)
- Job List Summary
- Job Listing
- Placement Misc Stats
- Placement Reason Summary
- Placement Salary Report
- Placement Stats by Time
- Placement Status Report
- Placement Verification Report
- Placements Stats
- Placements Stats by Field of Study
- Potential Graduates Needing an Externship
- Practicum Course Registration Report
- Student Placement Details
- Students by Resume Status
- Placements Stats (cube report)

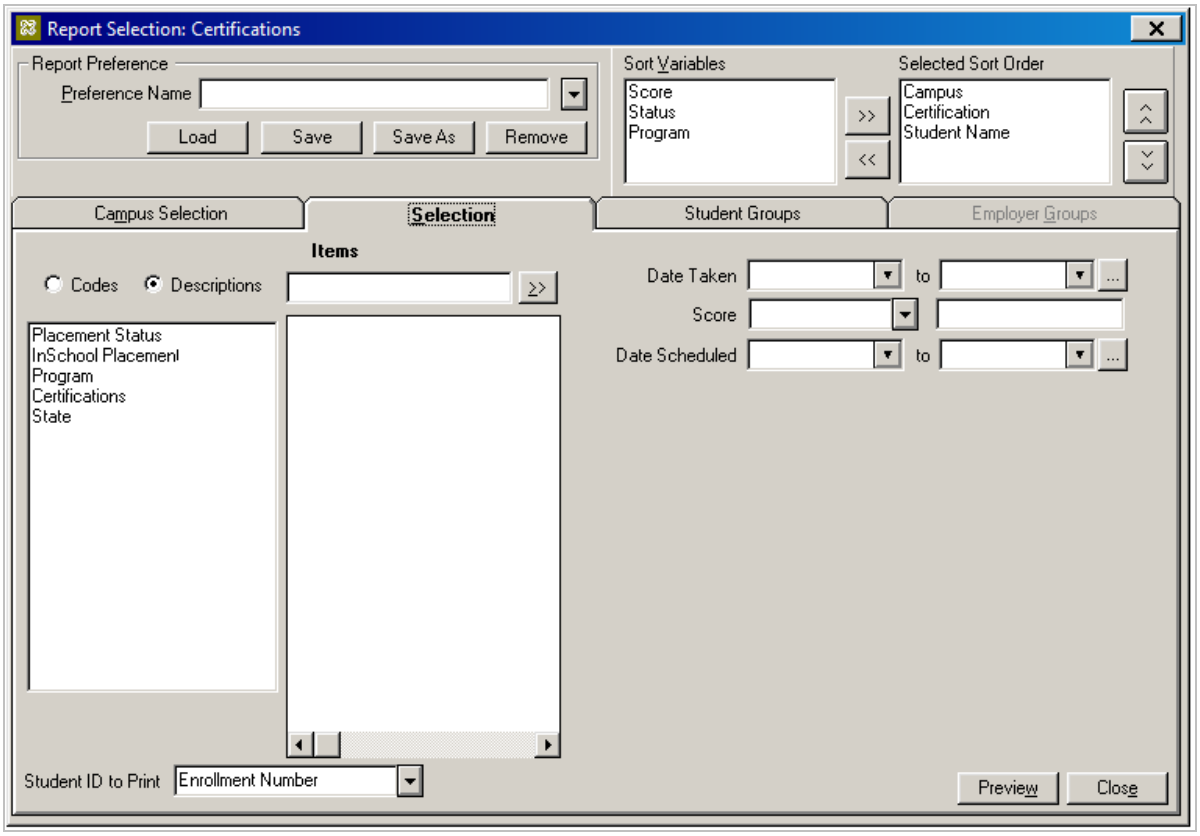
Note: The System Administrator must set up security rights to view, print, or export reports. Staff members and staff groups must be given security rights to view, print, and/or export reports. This does not apply to custom reports.

Certifications

This report lists certifications achieved by students.

To run the report:

1. Navigate to **Reports > Career Services > Certifications**. The Report Selection: Certifications form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

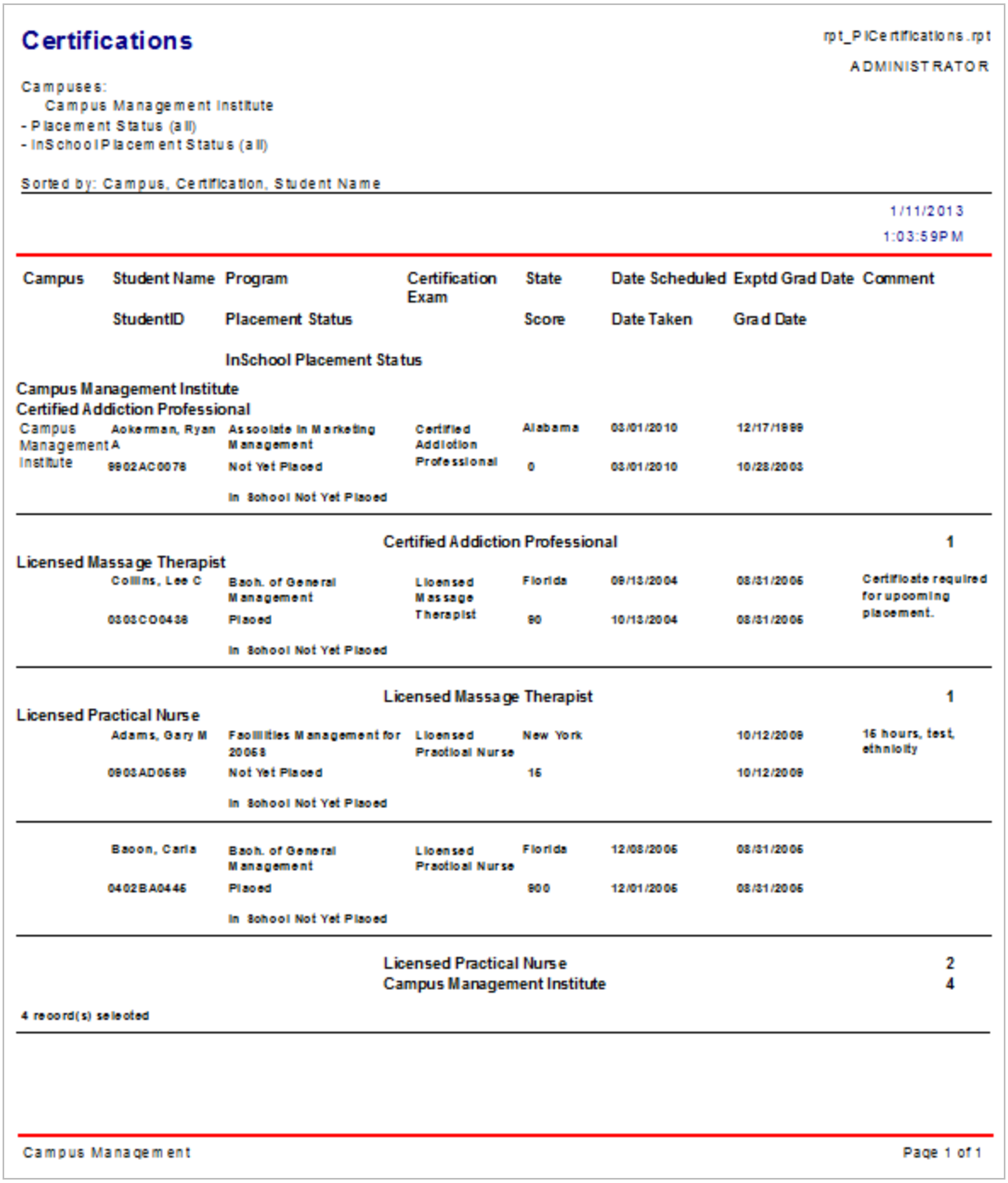
   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Campus
   - Student Name and ID
   - Program
   - Placement Status
   - In School Placement Status
   - Certification Exam
   - State

- Score
- Date Scheduled
- Date Taken
- Expected Graduation Date
- Graduation Date
- Comment



Certifications

rpt_PICertifications.rpt

ADMINISTRATOR

Campuses:
Campus Management Institute
- Placement Status (all)
- InSchoolPlacement Status (all)

Sorted by: Campus, Certification, Student Name

1/11/2013
1:03:59PM

Campus	Student Name	Program	Certification Exam	State	Date Scheduled	Exptd Grad Date	Comment
	StudentID	Placement Status		Score	Date Taken	Grad Date	
		InSchool Placement Status					
Campus Management Institute							
Certified Addiction Professional							
Campus Management Institute	Ackerman, Ryan A	Associate in Marketing Management	Certified Addiction Professional	Alabama	03/01/2010	12/17/1989	
	9902AC0078	Not Yet Placed		0	03/01/2010	10/28/2003	
		In School Not Yet Placed					
			Certified Addiction Professional				1
Licensed Massage Therapist							
	Collins, Lee C	Bach. of General Management	Licensed Massage Therapist	Florida	09/13/2004	08/31/2006	Certificate required for upcoming placement.
	0303CO0438	Placed		80	10/13/2004	08/31/2006	
		In School Not Yet Placed					
			Licensed Massage Therapist				1
Licensed Practical Nurse							
	Adams, Gary M	Facilities Management for 20068	Licensed Practical Nurse	New York		10/12/2009	16 hours, test, ethnicity
	0903AD0689	Not Yet Placed		16		10/12/2009	
		In School Not Yet Placed					
	Bacon, Carla	Bach. of General Management	Licensed Practical Nurse	Florida	12/08/2005	08/31/2006	
	0402BA0445	Placed		900	12/01/2005	08/31/2006	
		In School Not Yet Placed					
			Licensed Practical Nurse				2
			Campus Management Institute				4

4 record(s) selected

Campus Management

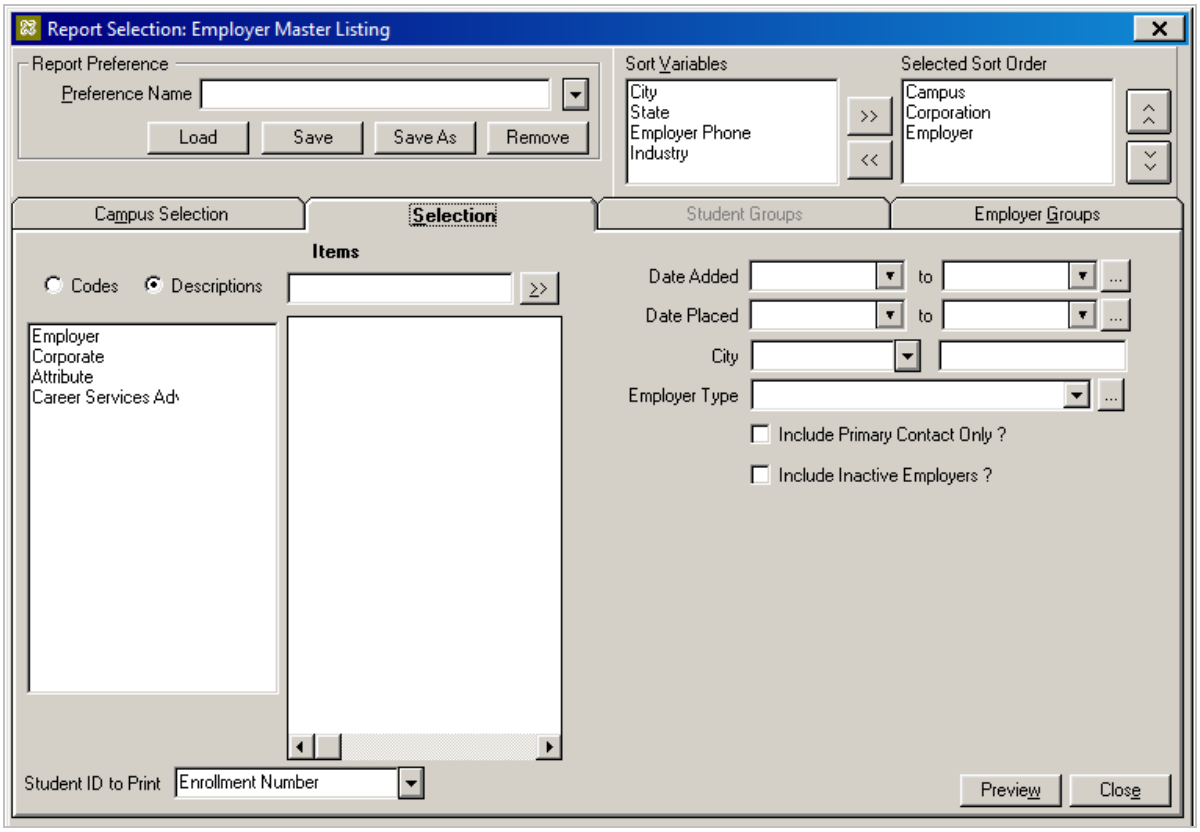
Page 1 of 1

Employer Master Listing

This report includes employer name and address data and some basic attributes of each employer selected for the report.

To run the report:

1. Navigate to **Reports > Career Services > Employer Master Listing**. The Report Selection: Employer Master Listing form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. Optional: You can also use the **Employer Groups** tab to filter the report data.

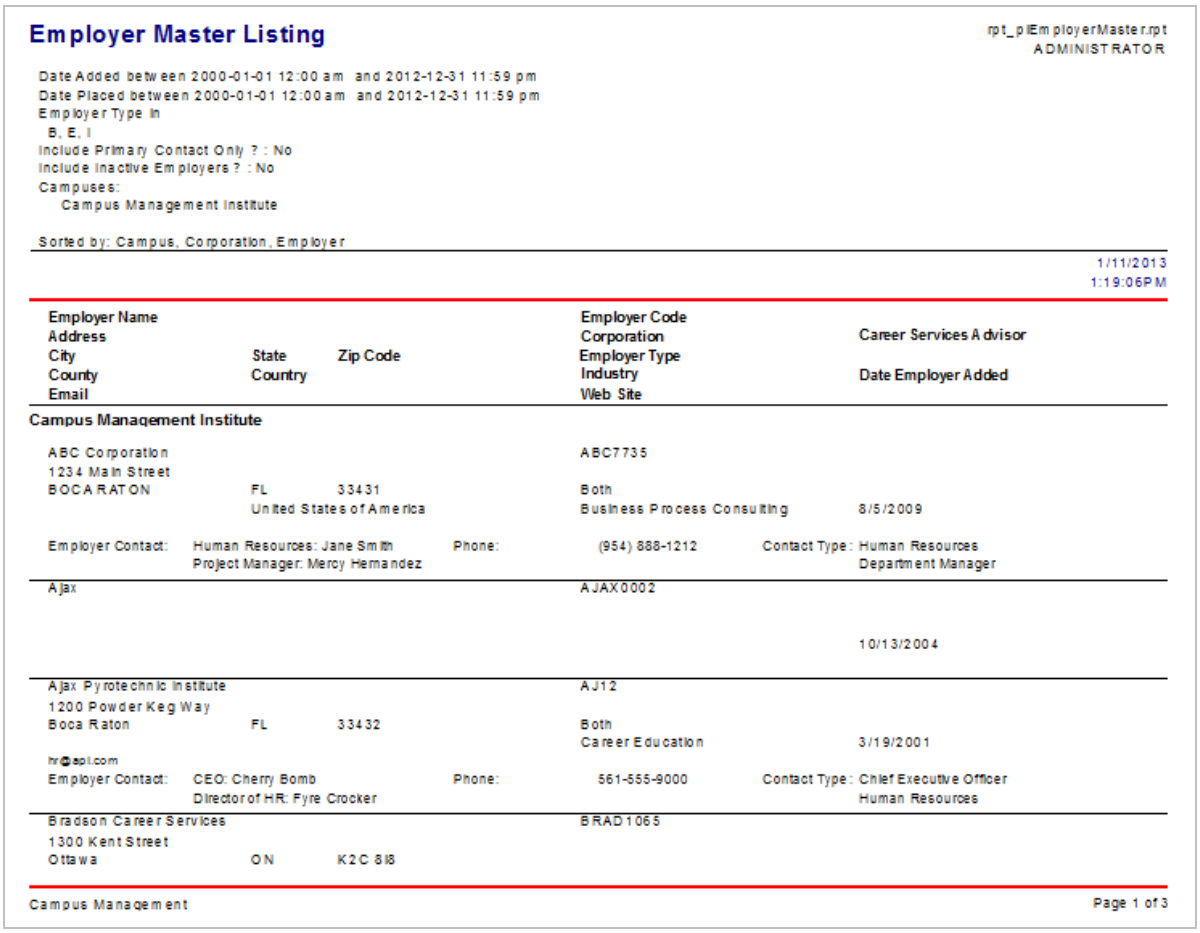
   Note: If you filter data by Employer Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Employer Name and Address
   - Employer Code
   - Corporate Affiliation
   - Employer Type
   - Industry
   - Website

- Career Services Advisor
- Date Employer Added
- Employer Contact information



Employer Master Listing

rpt_plEmployerMaster.rpt
ADMINISTRATOR

Date Added between 2000-01-01 12:00 am and 2012-12-31 11:59 pm
Date Placed between 2000-01-01 12:00 am and 2012-12-31 11:59 pm
Employer Type in
B, E, I
Include Primary Contact Only ? : No
Include Inactive Employers ? : No
Campuses:
Campus Management Institute

Sorted by: Campus, Corporation, Employer

1/11/2013
1:19:06PM

Employer Name / Address / City / County / Email	State / Country	Zip Code	Employer Code / Corporation / Employer Type / Industry / Web Site	Career Services Advisor / Date Employer Added
Campus Management Institute				
ABC Corporation 1234 Main Street BOCA RATON	FL United States of America	33431	ABC7735 Both Business Process Consulting	8/5/2009
Employer Contact: Human Resources: Jane Smith Project Manager: Mercy Hernandez	Phone: (954) 888-1212		Contact Type: Human Resources Department Manager	
Ajax			AJAX0002	10/13/2004
Ajax Pyrotechnic Institute 1200 Powder Keg Way Boca Raton hr@api.com	FL	33432	AJ12 Both Career Education	3/19/2001
Employer Contact: CEO: Cherry Bomb Director of HR: Fyre Crocker	Phone: 561-555-9000		Contact Type: Chief Executive Officer Human Resources	
Bradson Career Services 1300 Kent Street Ottawa	ON	K2C 8I8	BRAD1065	

Campus Management

Page 1 of 3

Job Conversion Rate

This report lists information about the conversion rate of job listings in placements. The report displays the number of job listings that were entered within the selected date range and how many of these job listings have been closed (a student was placed into the job), canceled, or unable to fill.

For each job listing entered into the system, the user can assign it to a specific industry, category, or program. The report displays the number of new job listings entered and the corresponding placements by campus, industry, and category. It also displays the average length of time to close listings for each category.

To run the report:

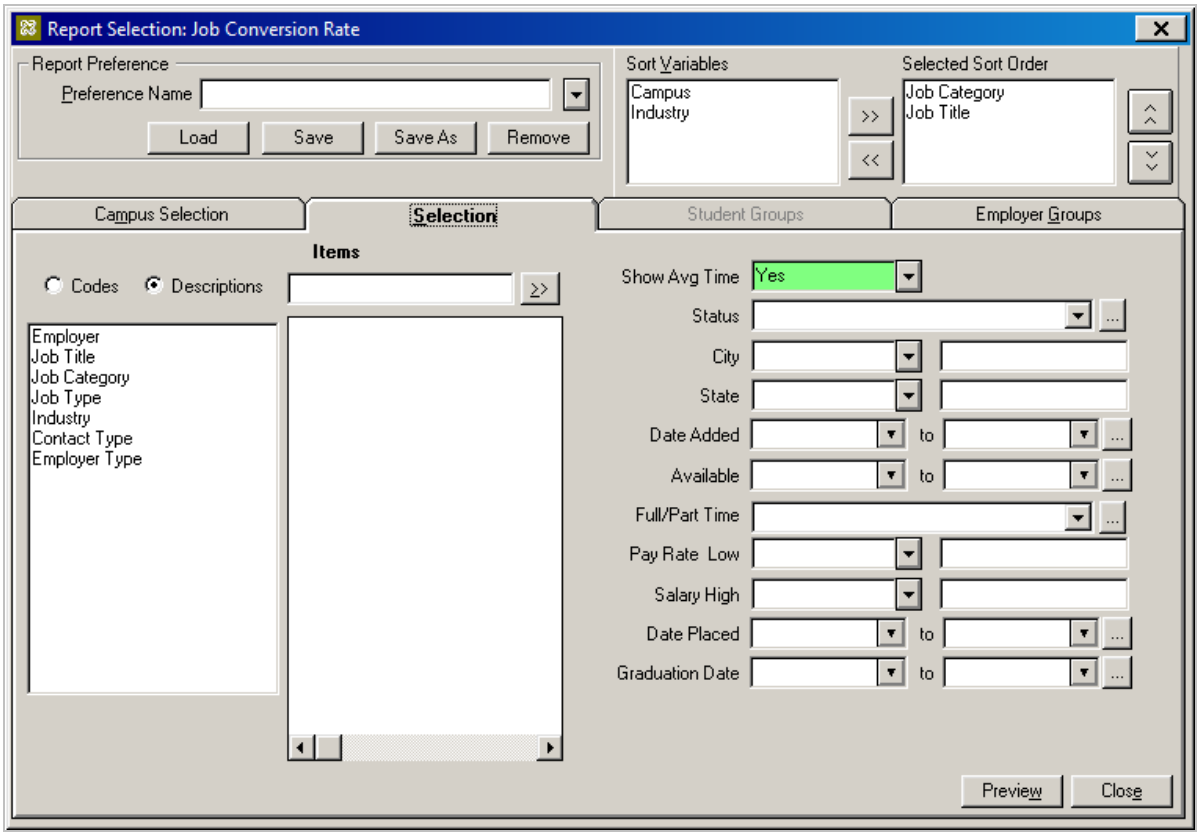
1. Navigate to **Reports > Career Services > Job Conversion Rate**. The Report Selection: Job Conversion Rate form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Note:

   You can select to include the average length of time it took to close the listings. If you include the time, an Average Time appears on the sort sub totals line of the report.

   The average time is calculated differently based upon what the outcome of the job was.

   - If the student was placed (job status = filled), then the average time is based on the low availability date, to the date that the student was placed in the job.
   - If the job was closed (status = closed or unable to fill) and no placements have been made, the average time is based on the low availability date to the high availability date.



4. Optional: You can also use the **Employer Groups** tab to filter the report data.

   Note: If you filter data by Employer Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Company
   - Job Title
   - Exact Job Title
   - Job Description
   - Employer Code
   - Contact
   - Job ID
   - Schedule
   - Job Category Code
   - Start Date
   - End Date
   - Date Added
   - Status
   - Average Time (Days)

Job Order Conversion Report

rpt_plJobConversionRate.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- Date Added on or after 1/1/2006

Sorted by: Job Category, Job Title

1/11/2013
1:32:19PM

Company / Job Title / Exact Job Title / Job Description	Employer Code / Contact	Job ID	Schedule / Job Category Code	Start Date / End Date	Date Added / Status / Avg Time (Days)
OTHER					
American Express Corporation	AMEX	59		4/6/2005	10/8/2009
Janitor			OTHER		
Copy Of General Cleaning Duties					
American Express Corporation	AMEX	59		4/6/2005	10/8/2009
Janitor			OTHER		
Copy Of General Cleaning Duties					
PROG					
Campus Management Corp	CAMP5522	55	Full Time	12/23/2008	12/23/2008
Programmer	Timmy Timmons		PROG		Available
Programmer Visual Basic Visual Basic Programmer with 5 years of experience					
Campus Management Corp	CAMP5522	55	Full Time	12/23/2008	12/23/2008
Programmer	Timmy Timmons		PROG		Available
Programmer Visual Basic Visual Basic Programmer with 5 years of experience					
Campus Management Corp	CAMP5522	55	Full Time	12/23/2008	12/23/2008
Programmer	Timmy Timmons		PROG		Available
Programmer Visual Basic Visual Basic Programmer with 5 years of experience					
American Express Corporation	AMEX	58	Part Time	3/1/2000	10/8/2009
Programmer	Joy Chambers		PROG	8/31/2000	
Copy Of VB Programmer					
American Express Corporation	AMEX	58	Part Time	3/1/2000	10/8/2009
Programmer	Joy Chambers		PROG	8/31/2000	
Copy Of VB Programmer					

7 Records selected

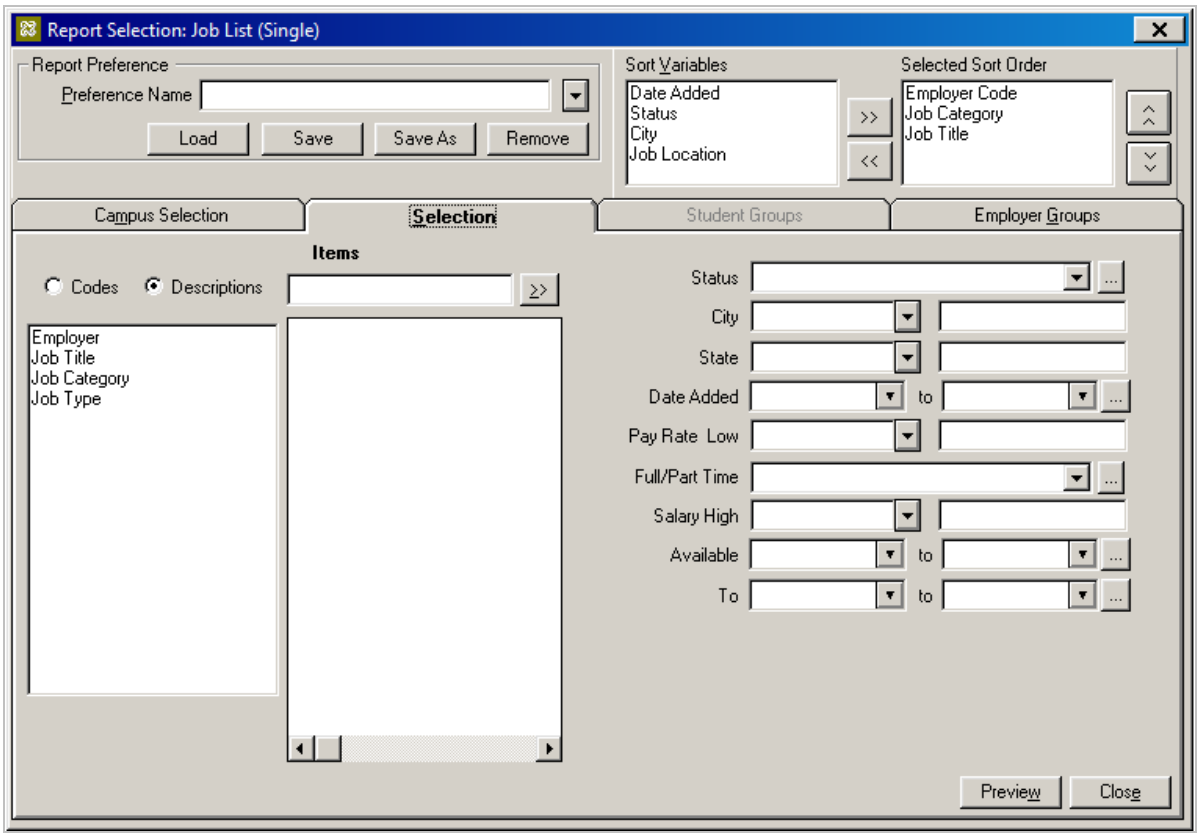
Campus Management — Page 1 of 1

Job List (Single)

This report lists one available job per page. It includes enough basic information to identify the employer (by ID) and the job (by ID), dates applications will be accepted, and some information about the nature of the job.

To run the report:

1. Navigate to **Reports > Career Services > Job List (Single)**. The Report Selection: Job List (Single) form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. Optional: You can also use the **Employer Groups** tab to filter the report data.

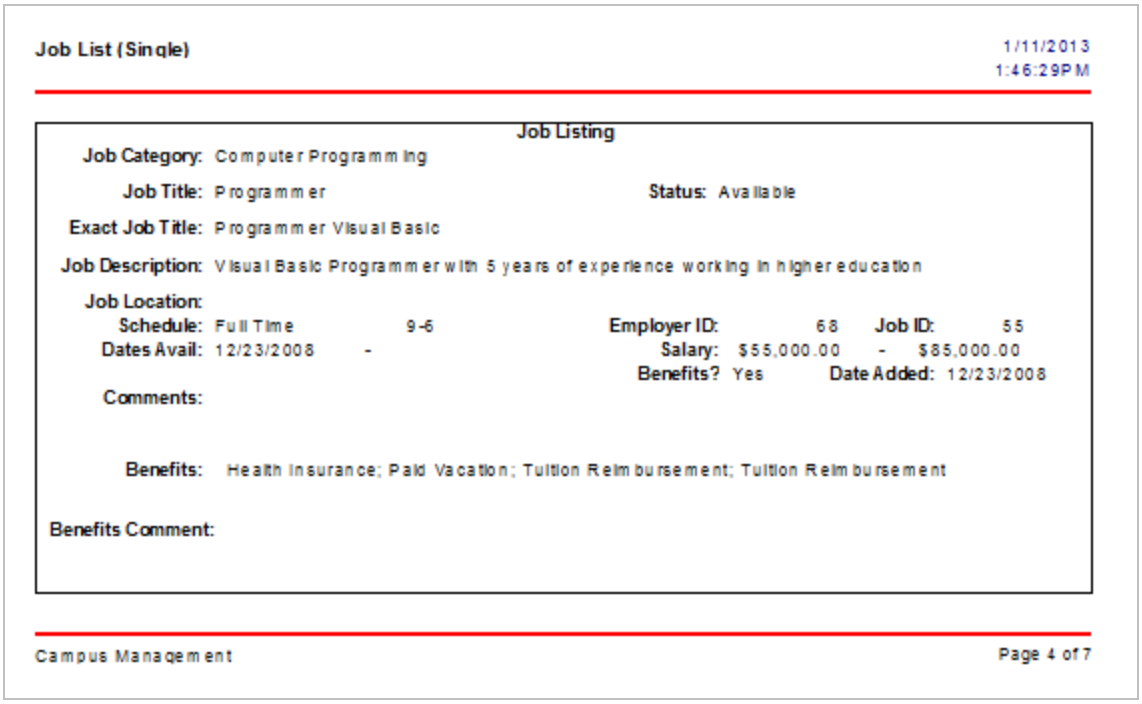
   Note: If you filter data by Employer Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Job Category
   - Job Title
   - Exact Job Title
   - Status
   - Job Description

- Job Location
- Schedule
- Dates within which applications will be accepted
- Employer ID
- Job ID
- Salary Range
- Date Job Added
- Comments (description of job requirements)
- Benefits (Yes/No)
- Benefits (listed)
- Benefits Comment



Job List (Single) 1/11/2013 1:46:29PM

Job Listing

Job Category: Computer Programming
Job Title: Programmer Status: Available
Exact Job Title: Programmer Visual Basic
Job Description: Visual Basic Programmer with 5 years of experience working in higher education
Job Location:
Schedule: Full Time 9-6 Employer ID: 68 Job ID: 55
Dates Avail: 12/23/2008 - Salary: $55,000.00 - $85,000.00
Benefits? Yes Date Added: 12/23/2008
Comments:
Benefits: Health Insurance; Paid Vacation; Tuition Reimbursement; Tuition Reimbursement
Benefits Comment:

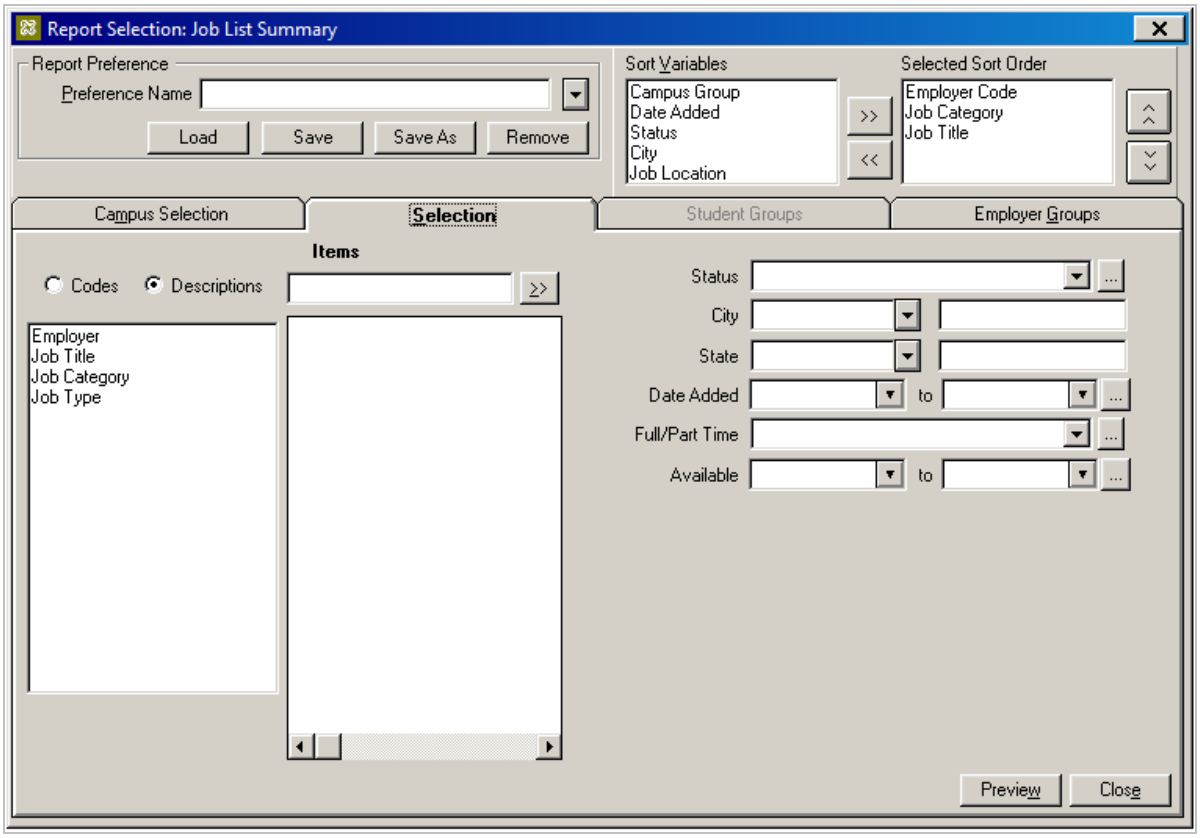
Campus Management Page 4 of 7

Job List Summary

This report provides summary information about available jobs by employer, job category, and job title.

To run the report:

1. Navigate to **Reports > Career Services > Job List Summary**. The Report Selection: Job List Summary form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



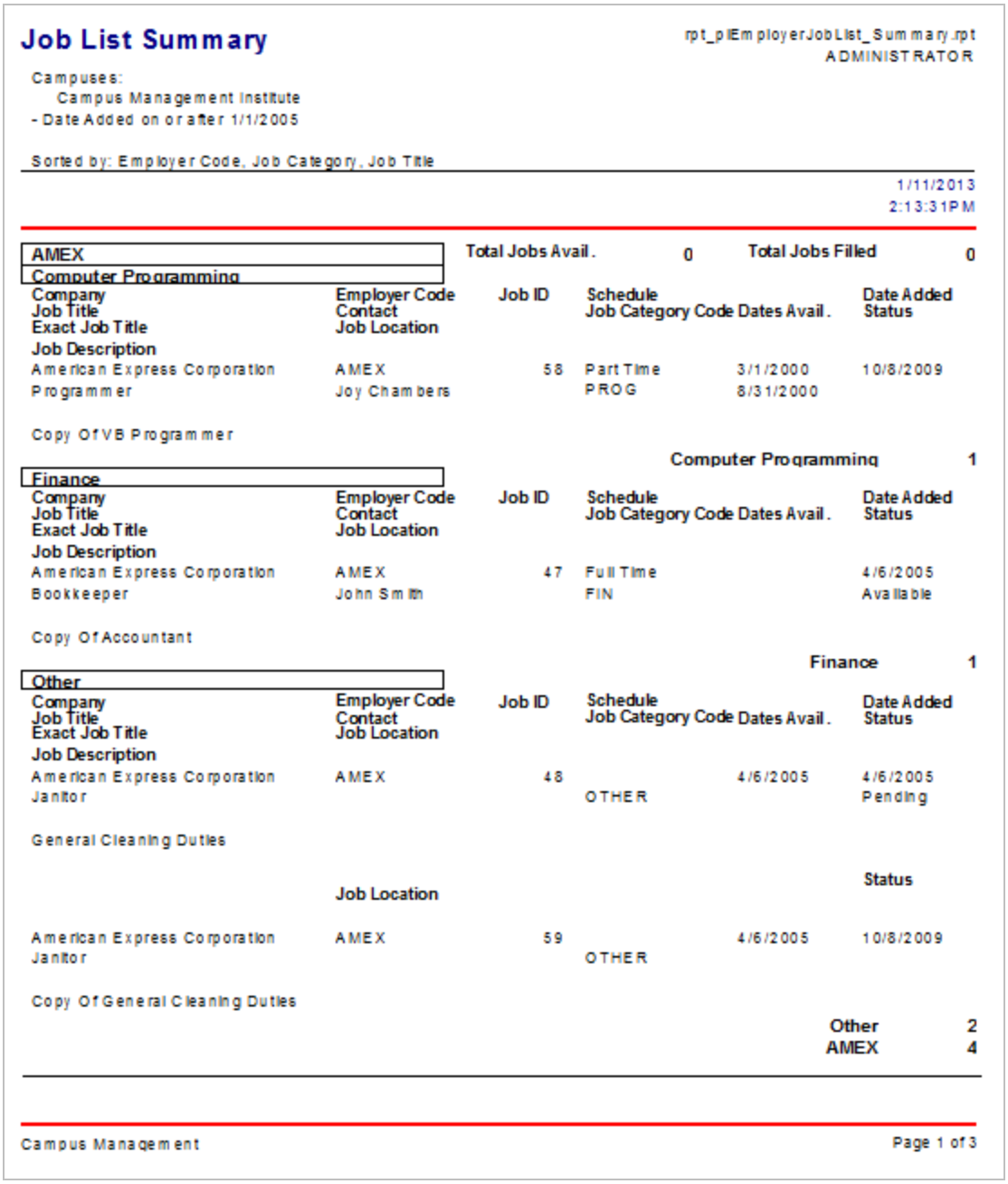
4. Optional: You can also use the **Employer Groups** tab to filter the report data.

   Note: If you filter data by Employer Groups, the Selection tab filters do not apply.
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Employer
   - Job Category
   - Job Title
   - Total Jobs Available
   - Total Jobs Filled
   - Company

- Job Title
- Exact Job Title
- Job Description
- Employer Code
- Contact
- Job Location
- Job ID
- Schedule
- Job Category Code
- Dates Available within which applications will be accepted
- Status
- Date Job Added
- Comments (description of job requirements)



Job List Summary

rpt_plEmployerJobList_Summary.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- Date Added on or after 1/1/2005

Sorted by: Employer Code, Job Category, Job Title

1/11/2013
2:13:31PM

AMEX — Total Jobs Avail. 0 — Total Jobs Filled 0

Computer Programming

Company / Job Title / Exact Job Title / Job Description	Employer Code / Contact / Job Location	Job ID	Schedule / Job Category Code	Dates Avail.	Date Added / Status
American Express Corporation	AMEX	58	Part Time	3/1/2000	10/8/2009
Programmer	Joy Chambers		PROG	8/31/2000	
Copy Of VB Programmer					

Computer Programming 1

Finance

Company / Job Title / Exact Job Title / Job Description	Employer Code / Contact / Job Location	Job ID	Schedule / Job Category Code	Dates Avail.	Date Added / Status
American Express Corporation	AMEX	47	Full Time		4/6/2005
Bookkeeper	John Smith		FIN		Available
Copy Of Accountant					

Finance 1

Other

Company / Job Title / Exact Job Title / Job Description	Employer Code / Contact / Job Location	Job ID	Schedule / Job Category Code	Dates Avail.	Date Added / Status
American Express Corporation	AMEX	48		4/6/2005	4/6/2005
Janitor			OTHER		Pending
General Cleaning Duties					
	Job Location				Status
American Express Corporation	AMEX	59		4/6/2005	10/8/2009
Janitor			OTHER		
Copy Of General Cleaning Duties					

Other 2
AMEX 4

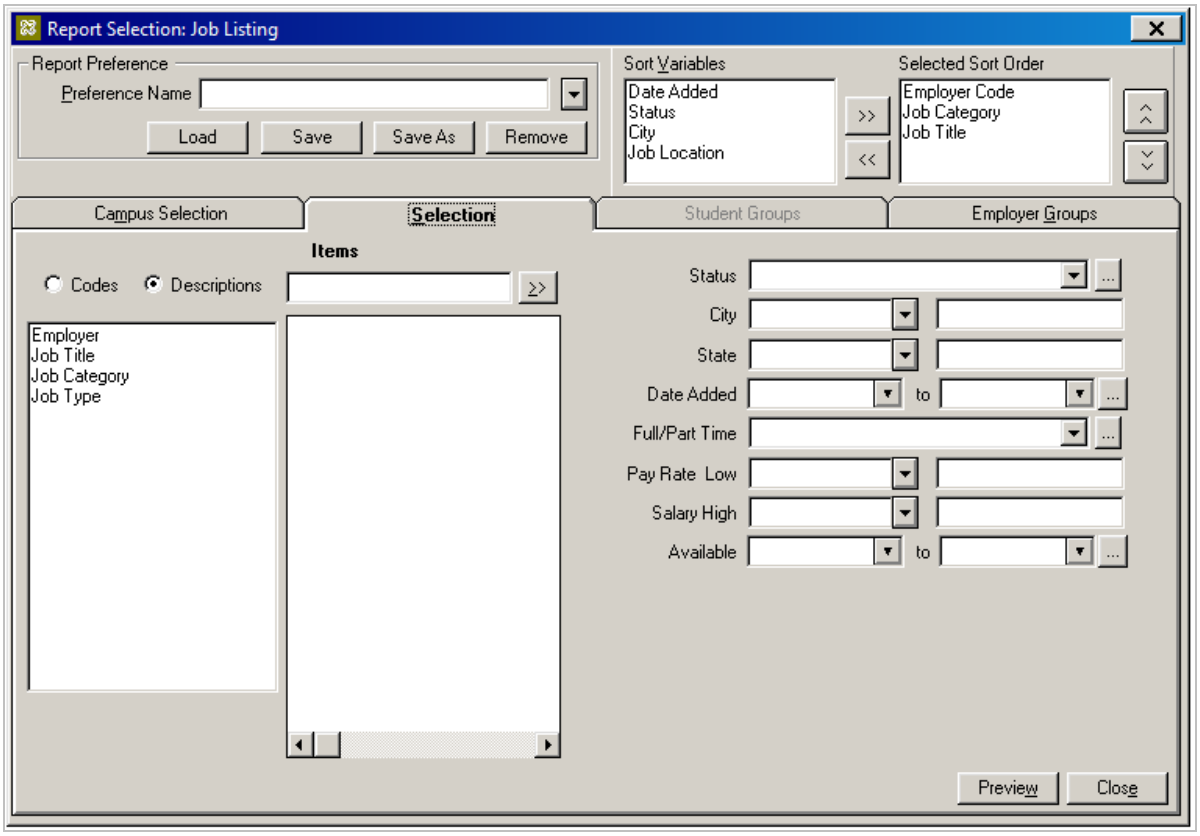
Campus Management — Page 1 of 3

Job Listing

This report displays available and filled jobs for each employer.

To run the report:

1. Navigate to **Reports > Career Services > Job Listing**. The Report Selection: Job Listing form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. Optional: You can also use the **Employer Groups** tab to filter the report data.

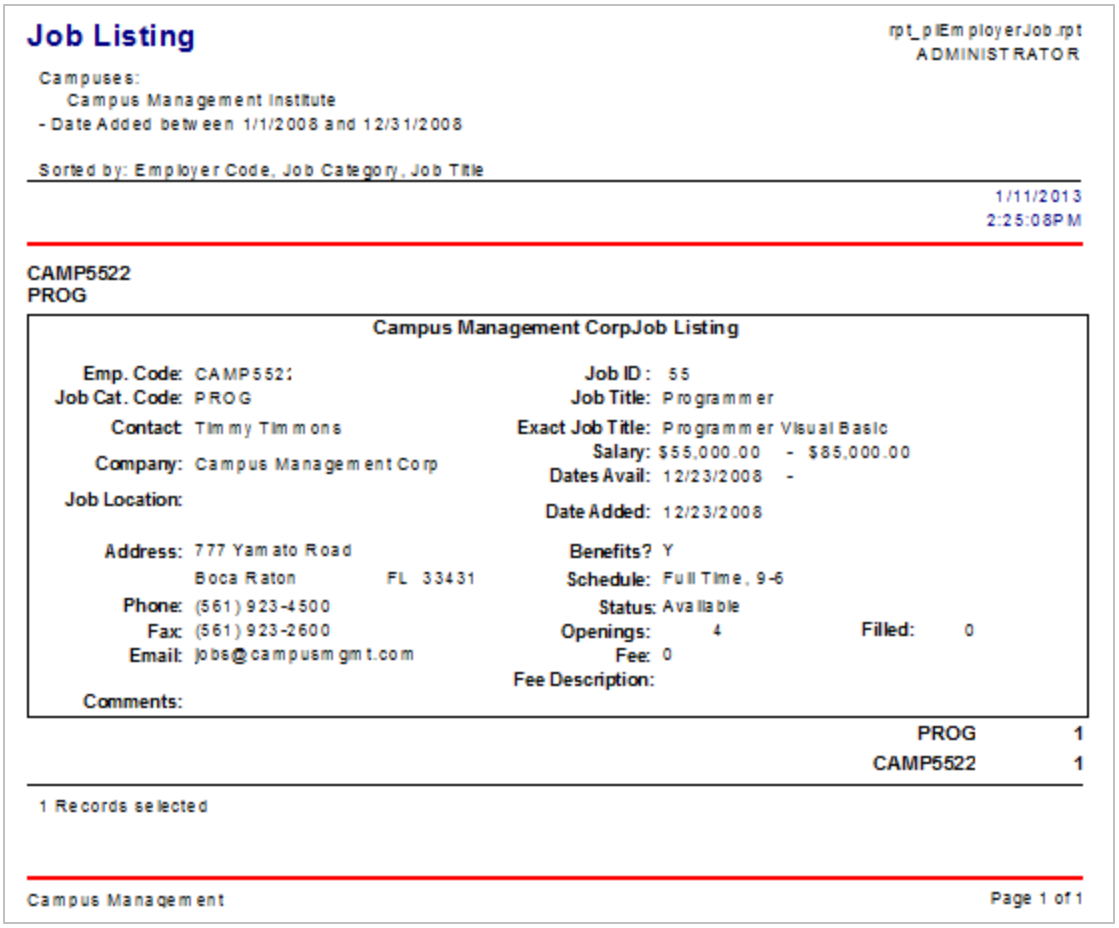
   Note: If you filter data by Employer Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Employer Code
   - Job Category Code
   - Contact
   - Company
   - Job Location
   - Address, Phone, Fax, Email
   - Job ID

- Job Title
- Exact Job Title
- Salary Range
- Job Description
- Dates Available
- Date Job Added
- Benefits (Yes/No)
- Schedule
- Status
- Number of Openings
- Number of Filled Positions
- Fee
- Fee Description
- Comments



Job Listing

rpt_plEmployerJob.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- Date Added between 1/1/2008 and 12/31/2008

Sorted by: Employer Code, Job Category, Job Title

1/11/2013
2:25:08PM

CAMP5522
PROG

Campus Management CorpJob Listing

Emp. Code: CAMP5522
Job Cat. Code: PROG
Contact: Timmy Timmons
Company: Campus Management Corp
Job Location:
Address: 777 Yamato Road
Boca Raton FL 33431
Phone: (561) 923-4500
Fax: (561) 923-2600
Email: jobs@campusmgmt.com
Comments:

Job ID: 55
Job Title: Programmer
Exact Job Title: Programmer Visual Basic
Salary: $55,000.00 - $85,000.00
Dates Avail: 12/23/2008 -
Date Added: 12/23/2008
Benefits? Y
Schedule: Full Time, 9-6
Status: Available
Openings: 4 Filled: 0
Fee: 0
Fee Description:

PROG 1
CAMP5522 1

1 Records selected

Campus Management
Page 1 of 1

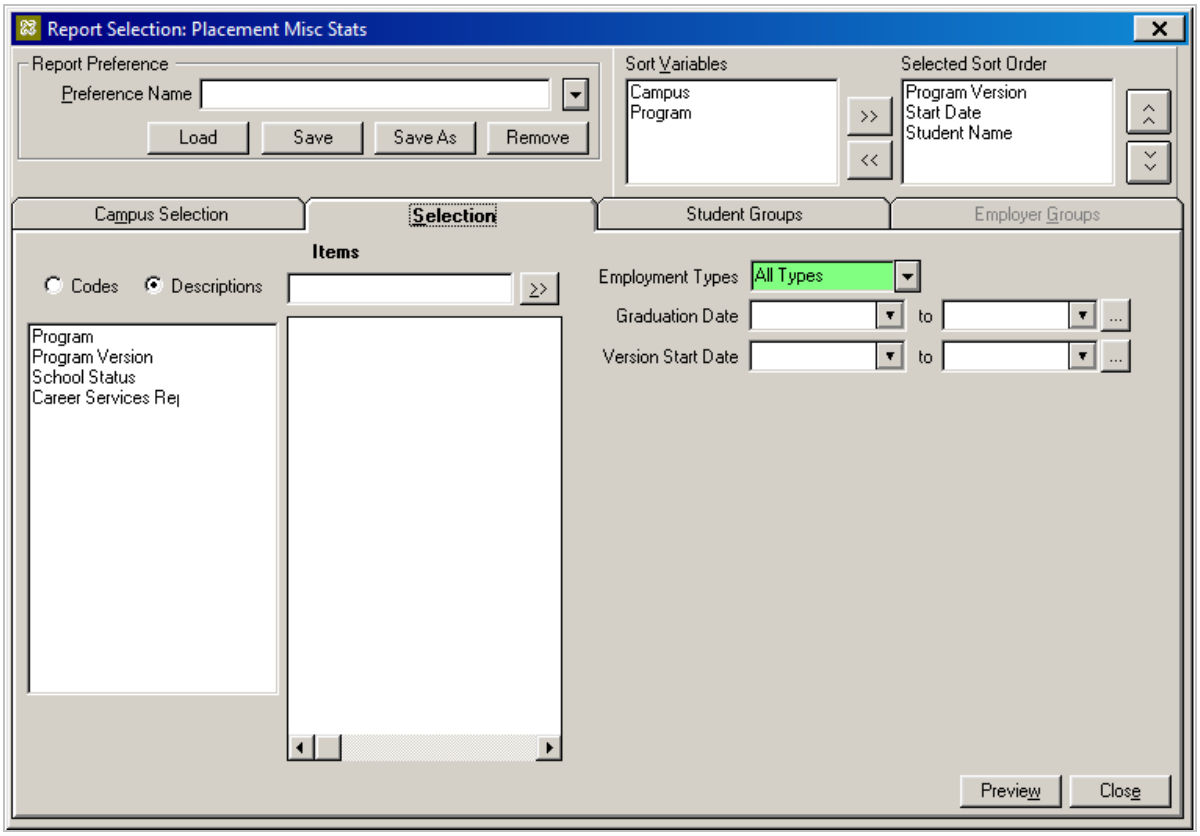
Placement Misc Stats

This report is a summary of placement activity at your school. The report excludes Cancels and Drops.

To run the report:

1. Navigate to **Reports > Career Services > Placement Misc Stats**. The Report Selection: Placement Misc Stats form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Note: If you filter the report on Program or Program Version, Program and Program Version must be included on the sort.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

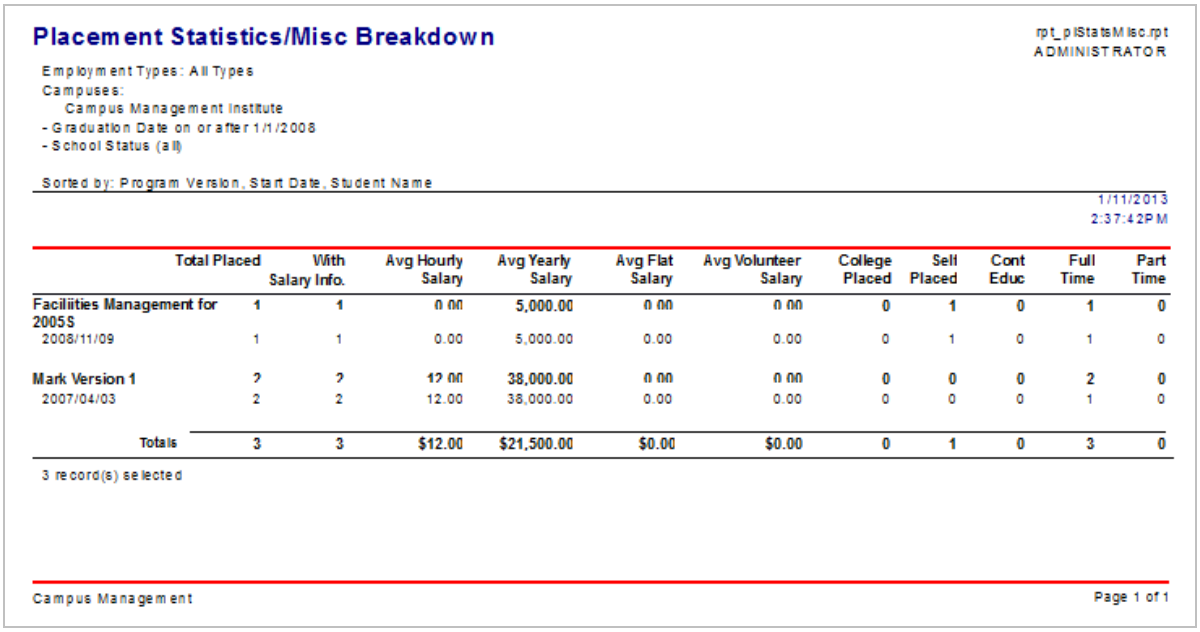
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report has a detail row for each program version. For each row on the report, the columns include:

   - Program Version Code
   - Total Placements
   - With Salary Info.
   - Average Hourly Wage

- Average Yearly Salary
- Average Flat Salary
- Average Volunteer Salary
- College Placed
- Self Placed
- Continuing Education
- Full Time
- Part Time

The "V - Volunteer" salary category counts as a placement for a school. The calculation of "Total Placed" remains the same. The calculation of Avg Hr Salary and Avg Yr Salary excludes the students where Salary Category = "V". The student will be counted as a placement; however the salary information may or may not be blank and should not be counted towards the average. Therefore, if there are 10 placements, and two (2) of those are "volunteer", the salary calculation will be an average based on eight (8) placements rather than 10.



Placement Statistics/Misc Breakdown

rpt_plStatsMisc.rpt
ADMINISTRATOR

Employment Types: All Types
Campuses:
Campus Management Institute
- Graduation Date on or after 1/1/2008
- School Status (all)

Sorted by: Program Version, Start Date, Student Name

1/11/2013
2:37:42PM

	Total Placed	With Salary Info.	Avg Hourly Salary	Avg Yearly Salary	Avg Flat Salary	Avg Volunteer Salary	College Placed	Self Placed	Cont Educ	Full Time	Part Time
Facilities Management for 2005S	**1**	**1**	**0.00**	**5,000.00**	**0.00**	**0.00**	**0**	**1**	**0**	**1**	**0**
2008/11/09	1	1	0.00	5,000.00	0.00	0.00	0	1	0	1	0
Mark Version 1	**2**	**2**	**12.00**	**38,000.00**	**0.00**	**0.00**	**0**	**0**	**0**	**2**	**0**
2007/04/03	2	2	12.00	38,000.00	0.00	0.00	0	0	0	1	0
Totals	**3**	**3**	**$12.00**	**$21,500.00**	**$0.00**	**$0.00**	**0**	**1**	**0**	**3**	**0**

3 record(s) selected

Campus Management

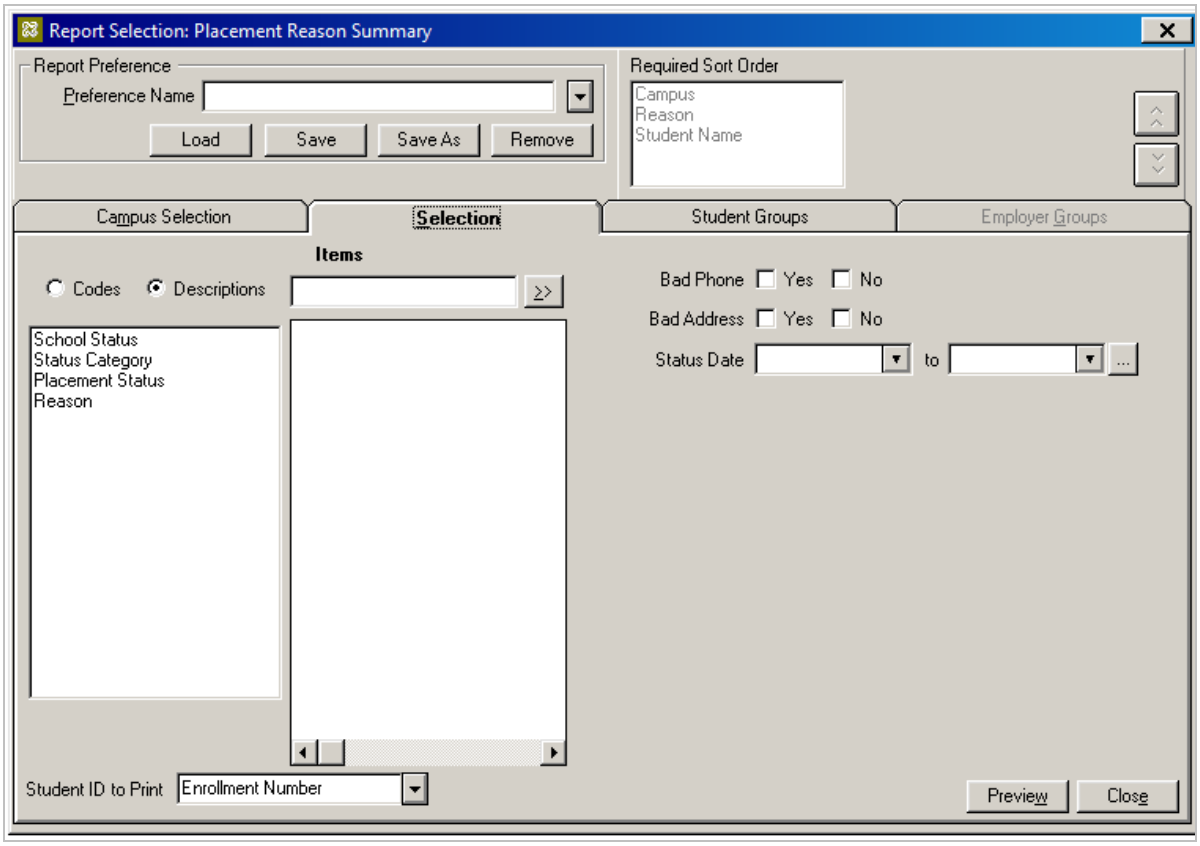
Page 1 of 1

Placement Reason Summary

This report is a summary of placements sorted by placement reason.

To run the report:

1. Navigate to **Reports > Career Services > Placement Reason Summary**. The Report Selection: Placement Reason Summary form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

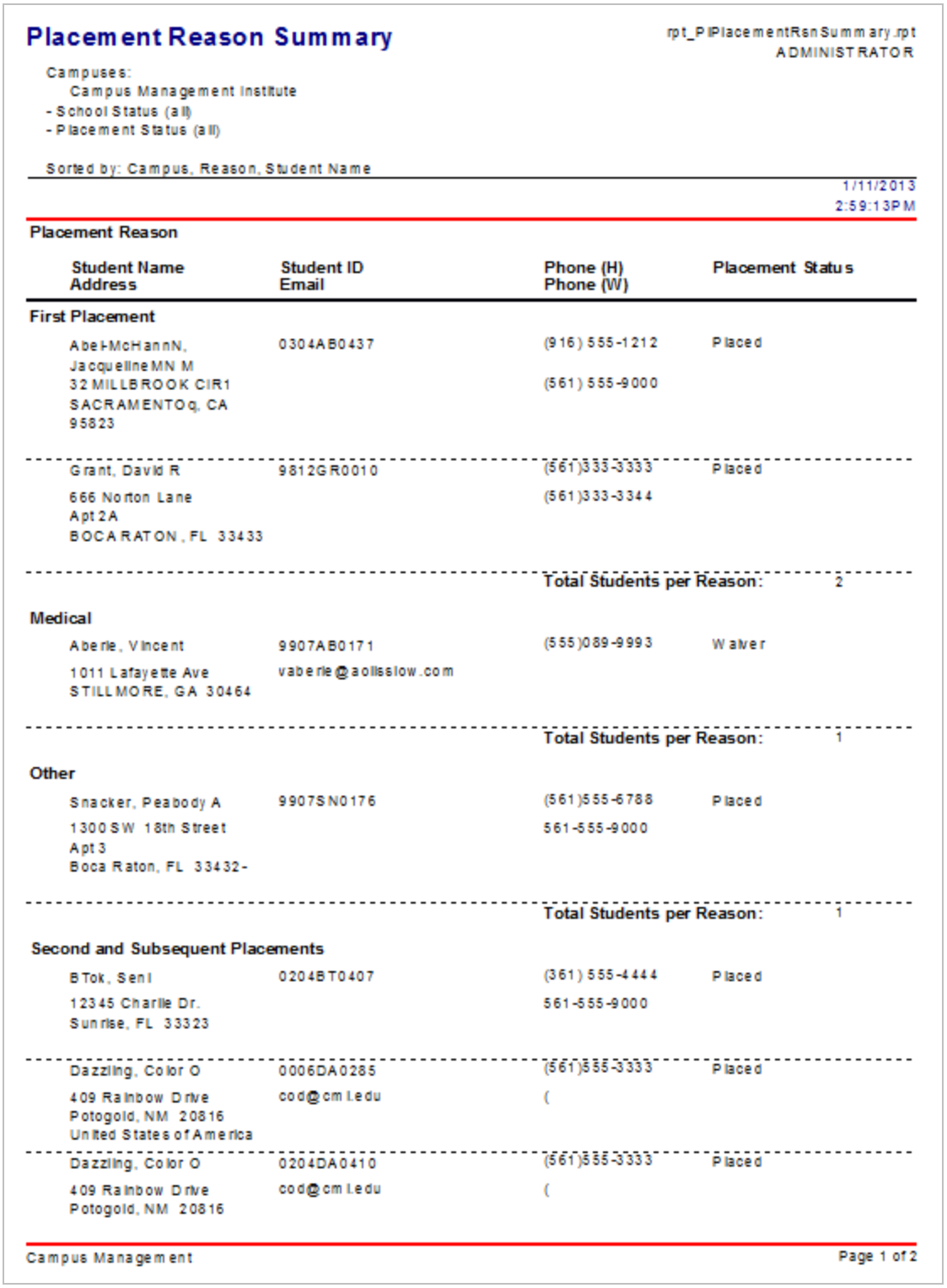
   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Placement Reason
   - Student Name
   - Student Address
   - Student ID
   - Student Email

- Student Phone (Home and Work)
- Placement Status



Placement Reason Summary

rpt_PlPlacementRsnSummary.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- School Status (all)
- Placement Status (all)

Sorted by: Campus, Reason, Student Name

1/11/2013
2:59:13PM

Placement Reason

Student Name / Address	Student ID / Email	Phone (H) / Phone (W)	Placement Status
First Placement			
Abel-McHannN, JacquelineMN M 32 MILLBROOK CIR1 SACRAMENTOq, CA 95823	0304AB0437	(916) 555-1212 (561) 555-9000	Placed
Grant, David R 666 Norton Lane Apt 2A BOCA RATON, FL 33433	9812GR0010	(561)333-3333 (561)333-3344	Placed
		Total Students per Reason:	2
Medical			
Aberle, Vincent 1011 Lafayette Ave STILLMORE, GA 30464	9907AB0171 vaberle@aolisslow.com	(555)089-9993	Waiver
		Total Students per Reason:	1
Other			
Snacker, Peabody A 1300 SW 18th Street Apt 3 Boca Raton, FL 33432-	9907SN0176	(561)555-6788 561-555-9000	Placed
		Total Students per Reason:	1
Second and Subsequent Placements			
BTok, Seni 12345 Charlie Dr. Sunrise, FL 33323	0204BT0407	(361) 555-4444 561-555-9000	Placed
Dazzling, Color O 409 Rainbow Drive Potogold, NM 20816 United States of America	0006DA0285 cod@cm.edu	(561)555-3333 (	Placed
Dazzling, Color O 409 Rainbow Drive Potogold, NM 20816	0204DA0410 cod@cm.edu	(561)555-3333 (	Placed

Campus Management

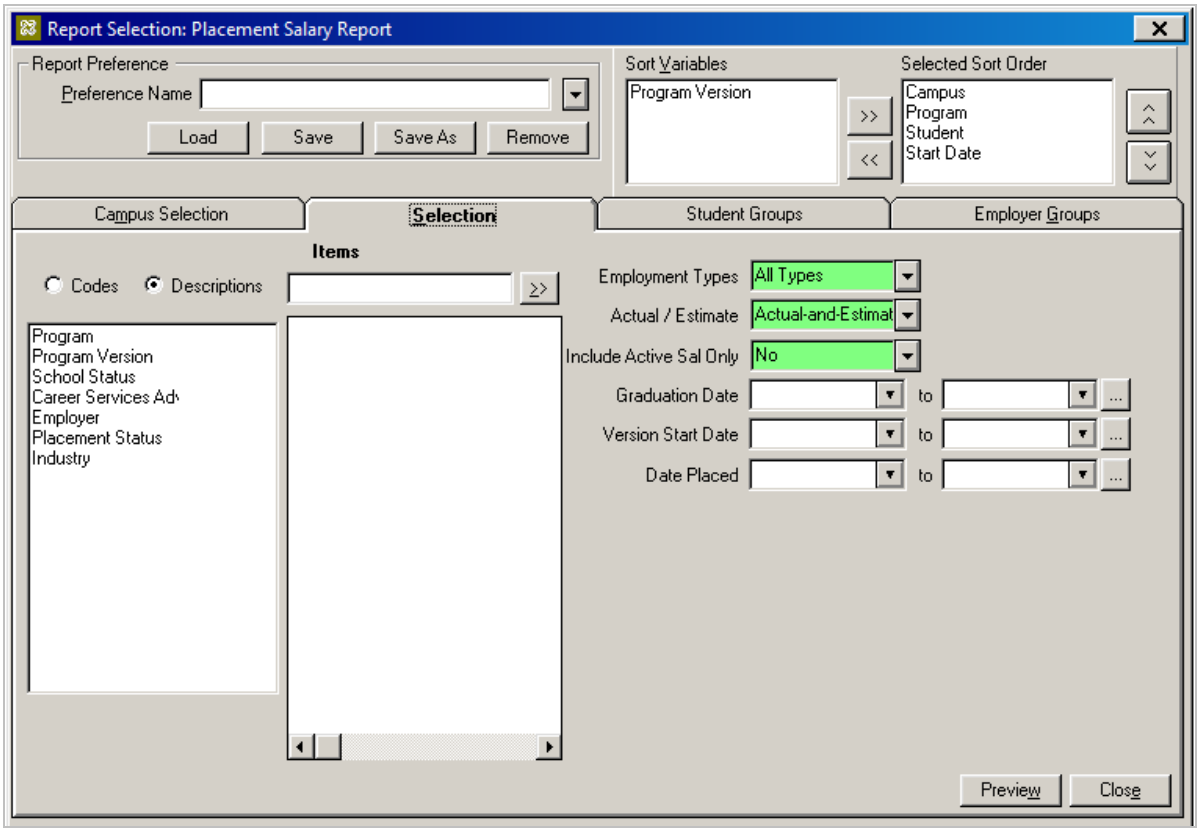
Page 1 of 2

Placement Salary Report

This report lists salary averages for placed students.

To run the report:

1. Navigate to **Reports > Career Services > Placement Salary Report**. The Report Selection: Placement Salary Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter the report data.

   Note: If you filter data by Student Groups, the Selection tab and Employer Groups tab filters do not apply.

5. *Optional*: You can also use the **Employer Groups** tab to filter the report data.

   Note: If you filter data by Employer Groups, the Selection tab and Student Groups tab filters do not apply.

6. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Campus
   - Student Name
   - Program

- Program Version
- Total Placed (placements, enrollments, total placed with salary information)
- Average Hourly Salary
- Average Yearly Salary
- Average Flat Salary
- Average Year Total Salary
- Average Volunteer Salary

Placement Salary Report

rpt_plPlacementSalary.rpt
ADMINISTRATOR

Employment Types: All Types
Salary Types: Actual-and-Estimated
Include Active Salaries Only?: No
Campuses:
Campus Management Institute
- School Status (all)
- Placement Status (all)

Sorted by: Campus, Program, Student, Start Date

1/11/2013
3:09:54PM

	Total Placed			Avg Hr Salary	Avg Yr Salary	Avg Flat Salary	Avg Yr Tot Salary*	Avg Vol Salary
	Plcmnts	Enrolls	w/Salary					
Campus Management Institute								
Bacon, Carla	1	1	1	0.00	48,000.00	0.00	48,000.00	0.00
Criminal Justice	**1**	**1**	**1**	**0.00**	**48,000.00**	**0.00**	**48,000.00**	**0.00**
Roberts, Jason	1	1	1	0.00	60,000.00	0.00	60,000.00	0.00
Distance Education	**1**	**1**	**1**	**0.00**	**60,000.00**	**0.00**	**60,000.00**	**0.00**
Adams, Gary M	1	1	1	0.00	5,000.00	0.00	5,000.00	0.00
Smith, John A	2	1	2	12.00	38,000.00	0.00	38,000.00	0.00
Facilities Management	**3**	**2**	**3**	**12.00**	**21,500.00**	**0.00**	**21,500.00**	**0.00**
Adair, Kim	0	1	0	0.00	0.00	0.00	0.00	0.00
Adcock, Jeff	4	1	3	0.00	160,000.00	0.00	160,000.00	0.00
Dazzling, Color O	1	1	1	0.00	30,000.00	0.00	30,000.00	0.00
Hall, James B	0	1	0	0.00	0.00	0.00	0.00	0.00
Shmoe, Joe	0	1	0	0.00	0.00	0.00	0.00	0.00
Smith, Samantha	0	1	0	0.00	0.00	0.00	0.00	0.00
Snacker, Peabody A	1	1	1	0.00	0.00	1,000.00	1,000.00	0.00
Stiles, kate	0	1	0	0.00	0.00	0.00	0.00	0.00
Financial Management	**6**	**8**	**5**	**0.00**	**95,000.00**	**1,000.00**	**63,666.67**	**0.00**
Abbott, Victoria A	1	1	1	0.00	40,000.00	0.00	40,000.00	0.00
Abel-McHann N, Jacquelinel	1	1	0	0.00	0.00	0.00	0.00	0.00
Andreu, Frank	1	1	1	0.00	25,000.00	0.00	25,000.00	0.00
Babe, Jeanette	0	1	0	0.00	0.00	0.00	0.00	0.00
Bacon, Carla	1	1	1	12.00	0.00	0.00	0.00	0.00
BTok, Seni	2	1	1	0.00	0.00	11,111.00	11,111.00	0.00
Budd, Billy	0	1	0	0.00	0.00	0.00	0.00	0.00
Collins, Lee C	4	1	2	249.00	0.00	0.00	0.00	0.00
Jones, Mike E	2	1	2	14.00	0.00	4,500.00	4,500.00	0.00
Smith, John A	0	1	0	0.00	0.00	0.00	0.00	0.00
Snacker, Peabody A	1	1	1	0.00	40,000.00	0.00	40,000.00	0.00
Student, Viv	3	1	3	0.00	50,000.00	70,000.00	120,000.00	0.00
General Management	**16**	**12**	**12**	**91.67**	**38,750.00**	**28,537.00**	**40,101.83**	**0.00**
Dazzling, Color O	2	1	2	0.00	78,000.00	0.00	78,000.00	0.00
Marketing Management	**2**	**1**	**2**	**0.00**	**78,000.00**	**0.00**	**78,000.00**	**0.00**
Totals:	**29**	**25**	**24**	**71.75**	**52,181.82**	**21,652.75**	**47,186.50**	**0.00**
Report Totals	**29**	**25**	**24**	**$71.75**	**$52,181.82**	**$21,652.75**	**$47,186.50**	**$0.00**

*Total Salary = Yearly Salary + Flat Salary (Bonus)

Campus Management

Page 1 of 1

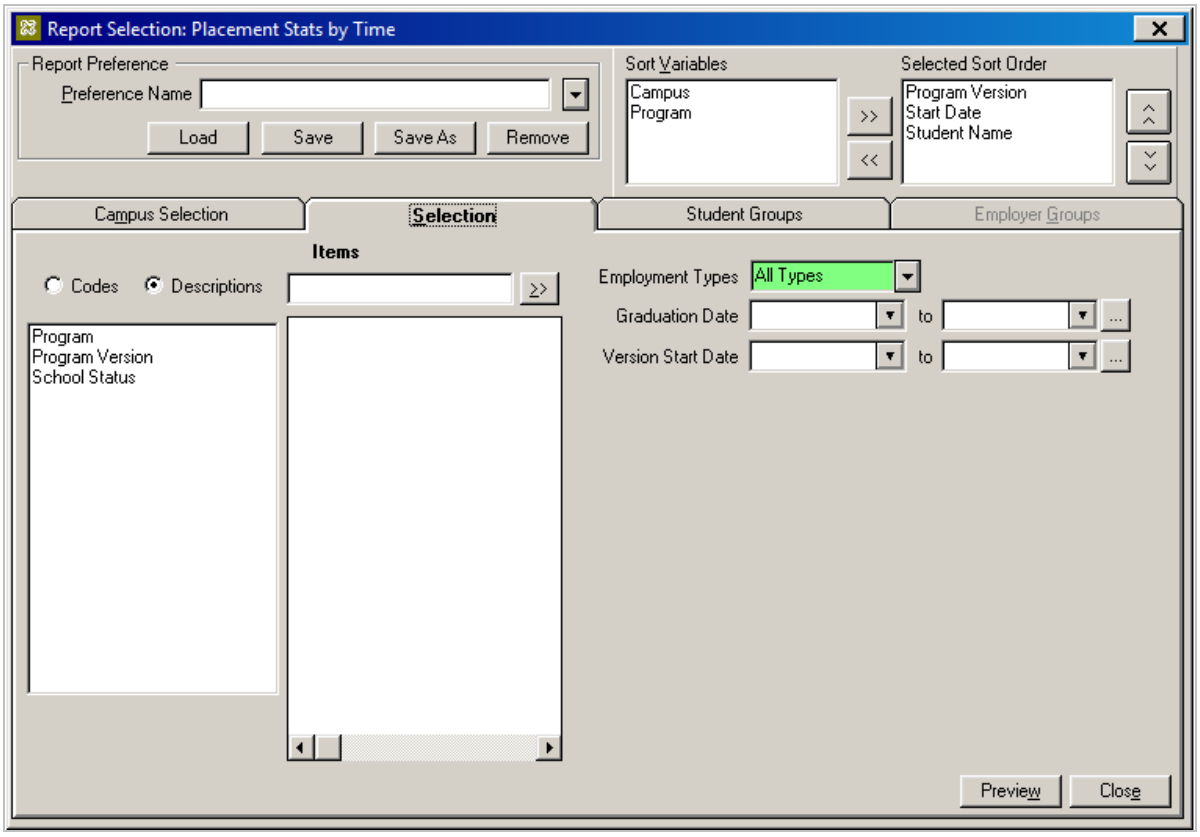
Placement Stats by Time

This report is a summary of placement activity measured in days from graduation to placement. The report excludes Cancels and Drops. The report does not include students where the System Status Code is = "NA" (Not Available).

To run the report:

1. Navigate to **Reports > Career Services > Placement Stats by Time**. The Report Selection: Placement Stats by Time form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Note: If you filter the report on Program or Program Version, Program and Program Version must be included on the sort.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report has a detail row for each program version. For each row on the report, the columns include:

   - Program Version Code
   - Total Placements
   - Not Yet Placed

- Unknown Number of Days to Placement
- 0 to 30 Days to Placement
- 31 to 60 Days to Placement
- 61 to 90 Days to Placement
- Percentage of Total Placements in the 0 to 30 Range
- Percentage of Total Placements in the 31 to 60 Range
- Percentage of Total Placements in the 61 to 90 Range
- Percentage of Total Placements 91+ Days

Percentages are rounded and presented out to 2 decimal places.

Placement Statistics by Time

rpt_plStatsDays.rpt
ADMINISTRATOR

Employment Types: All Types
Campuses:
Campus Management Institute
- Graduation Date on or after 1/1/2009
- School Status (all)

Sorted by: Program Version, Start Date, Student Name

1/11/2013
3:21:23PM

	Total Placed	Not Yet Placed	Placed (Date Unknown)	Days to Placement 0-30	31-60	61-90	91+	Percentages 0-30	31-60	61-90	91+
111670 PV	**0**	**8**	**0**	**0**	**0**	**0**	**0**	**0.00**	**0.00**	**0.00**	**0.00**
	0	1	0	0	0	0	0	0.00	0.00	0.00	0.00
2011/07/01	0	7	0	0	0	0	0	0.00	0.00	0.00	0.00
Bach. of General Management	**0**	**2**	**0**	**0**	**0**	**0**	**0**	**0.00**	**0.00**	**0.00**	**0.00**
2008/01/23	0	1	0	0	0	0	0	0.00	0.00	0.00	0.00
2009/01/01	0	1	0	0	0	0	0	0.00	0.00	0.00	0.00
Bachelor of Science in General Management	**0**	**1**	**0**	**0**	**0**	**0**	**0**	**0.00**	**0.00**	**0.00**	**0.00**
2009/01/01	0	1	0	0	0	0	0	0.00	0.00	0.00	0.00
Cert Financial Management	**0**	**1**	**0**	**0**	**0**	**0**	**0**	**0.00**	**0.00**	**0.00**	**0.00**
2009/01/01	0	1	0	0	0	0	0	0.00	0.00	0.00	0.00
Certificate in Facilities Management	**0**	**1**	**0**	**0**	**0**	**0**	**0**	**0.00**	**0.00**	**0.00**	**0.00**
2007/09/04	0	1	0	0	0	0	0	0.00	0.00	0.00	0.00
Credit Associate in Marketing Management	**0**	**2**	**0**	**0**	**0**	**0**	**0**	**0.00**	**0.00**	**0.00**	**0.00**
2009/01/01	0	1	0	0	0	0	0	0.00	0.00	0.00	0.00
2010/01/05	0	1	0	0	0	0	0	0.00	0.00	0.00	0.00
Criminology BA	**0**	**2**	**0**	**0**	**0**	**0**	**0**	**0.00**	**0.00**	**0.00**	**0.00**
	0	2	0	0	0	0	0	0.00	0.00	0.00	0.00
Culinary Arts	**0**	**2**	**0**	**0**	**0**	**0**	**0**	**0.00**	**0.00**	**0.00**	**0.00**
	0	1	0	0	0	0	0	0.00	0.00	0.00	0.00
2000/03/27	0	1	0	0	0	0	0	0.00	0.00	0.00	0.00
Faciliities Management for 2005	**1**	**3**	**0**	**1**	**0**	**0**	**0**	**100.00**	**0.00**	**0.00**	**0.00**
2005/09/05	0	1	0	0	0	0	0	0.00	0.00	0.00	0.00
2008/10/02	0	1	0	0	0	0	0	0.00	0.00	0.00	0.00
2008/11/09	1	1	0	1	0	0	0	100.00	0.00	0.00	0.00
Program Bachelor Hautes Études en Hôtellerie Professions de L'Accueil	**0**	**6**	**0**	**0**	**0**	**0**	**0**	**0.00**	**0.00**	**0.00**	**0.00**
	0	2	0	0	0	0	0	0.00	0.00	0.00	0.00
2010/09/06	0	1	0	0	0	0	0	0.00	0.00	0.00	0.00
2011/09/19	0	3	0	0	0	0	0	0.00	0.00	0.00	0.00
Totals	**1**	**28**	**0**	**1**	**0**	**0**	**0**	**100.00**	**0.00**	**0.00**	**0.00**

29 record(s) selected

Campus Management

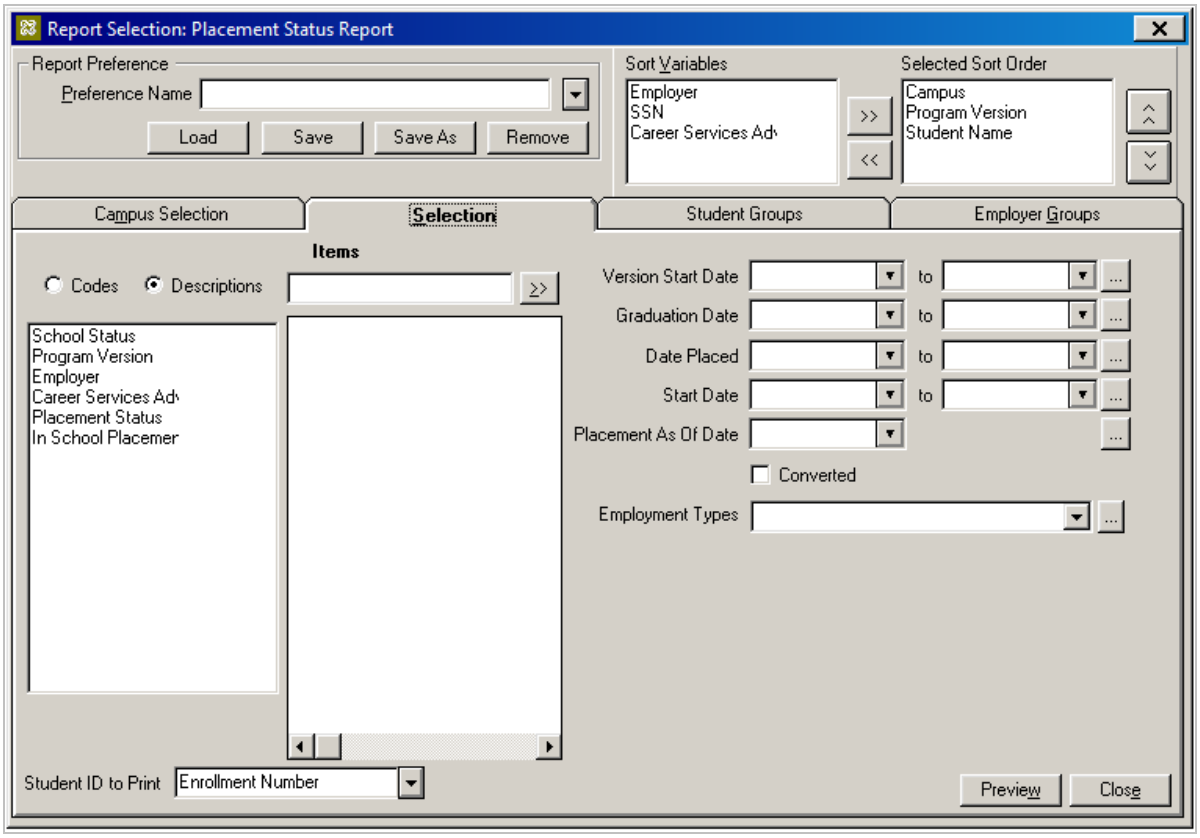
Page 1 of 1

Placement Status Report

This report shows the placement status of students and related employer information.

To run the report:

1. Navigate to **Reports > Career Services > Placement Status Report**. The Report Selection: Placement Status Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter the report data.

   Note: If you filter data by Student Groups, the Selection tab and Employer Groups tab filters do not apply.

5. *Optional*: You can also use the **Employer Groups** tab to filter the report data.

   Note: If you filter data by Employer Groups, the Selection tab and Student Groups tab filters do not apply.

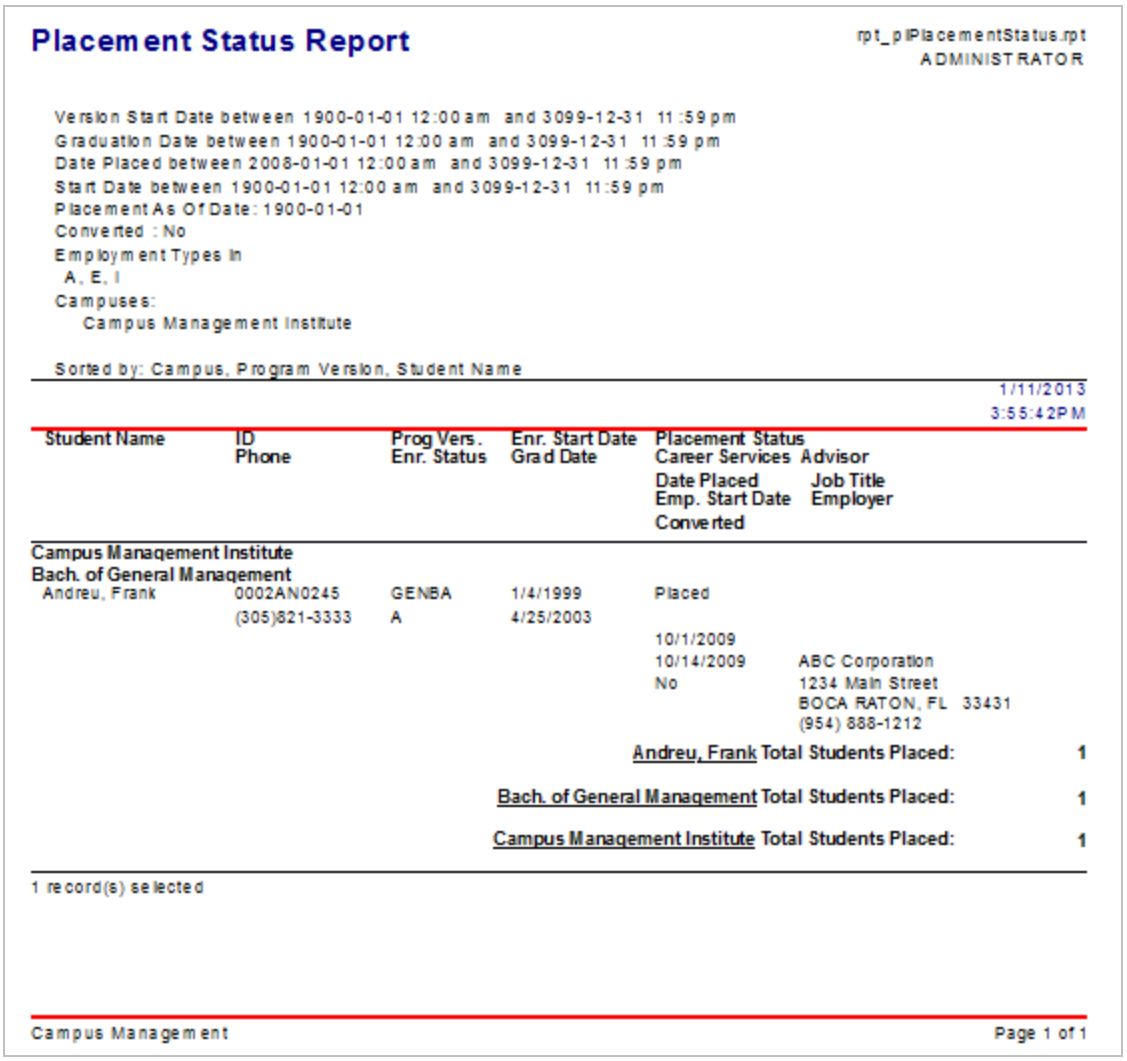
6. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Student ID
   - Student Phone

- Program Version
- Enrollment Status
- Enrollment Start Date
- Graduation Date
- Placement Status
- Career Services Advisor
- Date Placed
- Employment Start Date
- Converted
- Job Title
- Employer

The employer's name, address, and telephone number appear to the right of a student having a status of Placed on this report.



Placement Status Report

rpt_plPlacementStatus.rpt
ADMINISTRATOR

Version Start Date between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Graduation Date between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Date Placed between 2008-01-01 12:00 am and 3099-12-31 11:59 pm
Start Date between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Placement As Of Date: 1900-01-01
Converted : No
Employment Types In
A, E, I
Campuses:
Campus Management Institute

Sorted by: Campus, Program Version, Student Name

1/11/2013
3:55:42PM

Student Name	ID Phone	Prog Vers. Enr. Status	Enr. Start Date Grad Date	Placement Status Career Services Advisor Date Placed Emp. Start Date Converted	Job Title Employer	
Campus Management Institute						
Bach. of General Management						
Andreu, Frank	0002AN0245 (305)821-3333	GENBA A	1/4/1999 4/25/2003	Placed 10/1/2009 10/14/2009 No	ABC Corporation 1234 Main Street BOCA RATON, FL 33431 (954) 888-1212	
				Andreu, Frank Total Students Placed:		1
				Bach. of General Management Total Students Placed:		1
				Campus Management Institute Total Students Placed:		1

1 record(s) selected

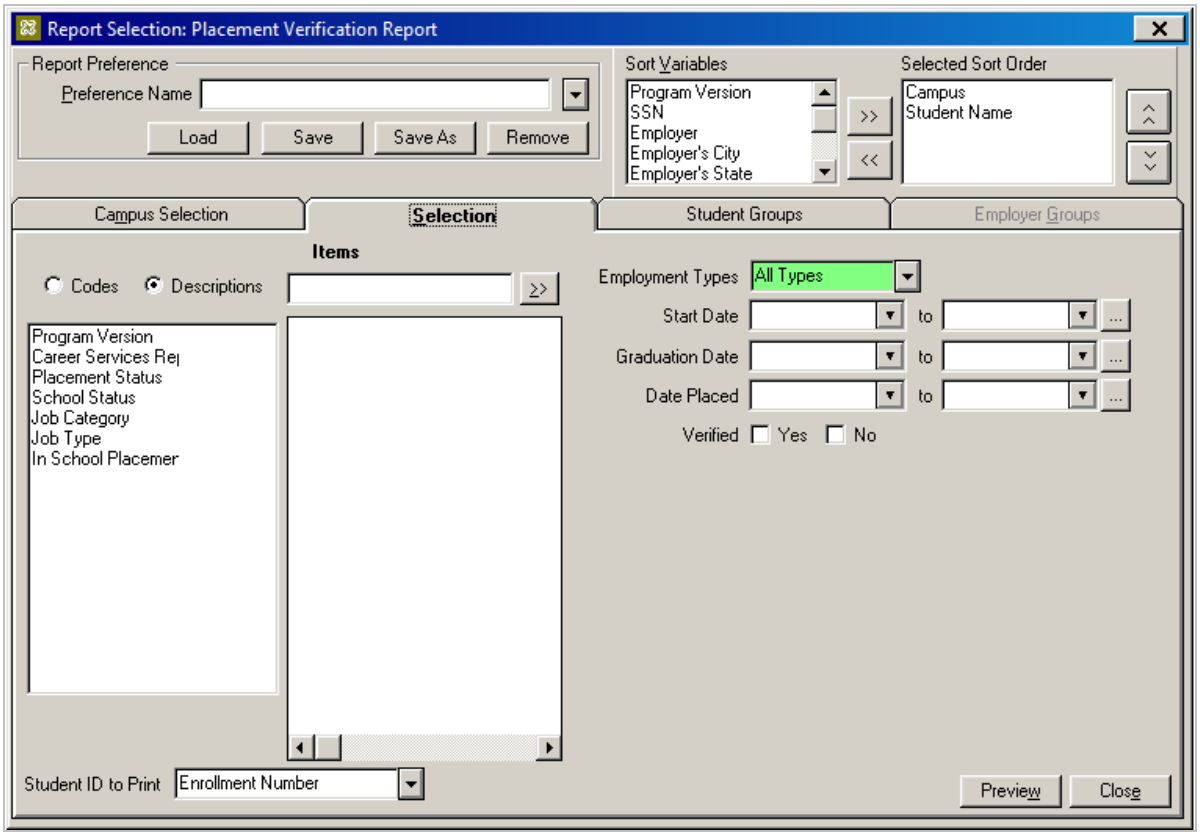
Campus Management
Page 1 of 1

Placement Verification Report

This report can be used as a tool for processing verifications. Using the report selection criteria, you can list a group of students with a column that indicates whether their employment has been verified and use the list of those students who have not been verified as a check list when performing the verifications.

To run the report:

1. Navigate to **Reports > Career Services > Placement Verification Report**. The Report Selection: Placement Verification Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

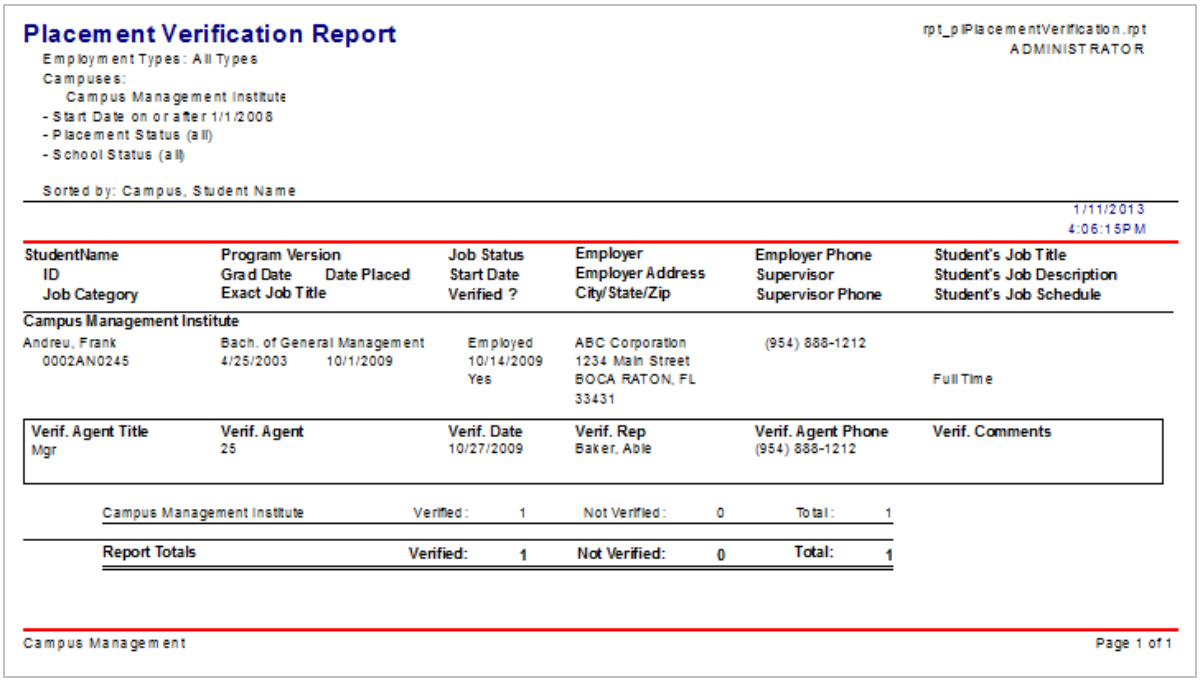
   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name and ID
   - Job Category
   - Program Version
   - Graduation Date

- Date Placed
- Exact Job Title
- Job Status
- Start Date
- Verified (Yes/No)
- Employer
- Employer Address and Phone
- Supervisor
- Supervisor Phone
- Student's Job Title
- Student's Job Description
- Student's Job Schedule



Placement Verification Report

rpt_plPlacementVerification.rpt
ADMINISTRATOR

Employment Types: All Types
Campuses:
Campus Management Institute
- Start Date on or after 1/1/2008
- Placement Status (all)
- School Status (all)

Sorted by: Campus, Student Name

1/11/2013
4:06:15PM

StudentName / ID / Job Category	Program Version / Grad Date / Exact Job Title	Date Placed	Job Status / Start Date / Verified ?	Employer / Employer Address / City/State/Zip	Employer Phone / Supervisor / Supervisor Phone	Student's Job Title / Student's Job Description / Student's Job Schedule
Campus Management Institute						
Andreu, Frank 0002AN0245	Bach. of General Management 4/25/2003	10/1/2009	Employed 10/14/2009 Yes	ABC Corporation 1234 Main Street BOCA RATON, FL 33431	(954) 888-1212	Full Time

Verif. Agent Title	Verif. Agent	Verif. Date	Verif. Rep	Verif. Agent Phone	Verif. Comments
Mgr	25	10/27/2009	Baker, Able	(954) 888-1212	

Campus Management Institute	Verified:	1	Not Verified:	0	Total:	1
Report Totals	**Verified:**	**1**	**Not Verified:**	**0**	**Total:**	**1**

Campus Management
Page 1 of 1

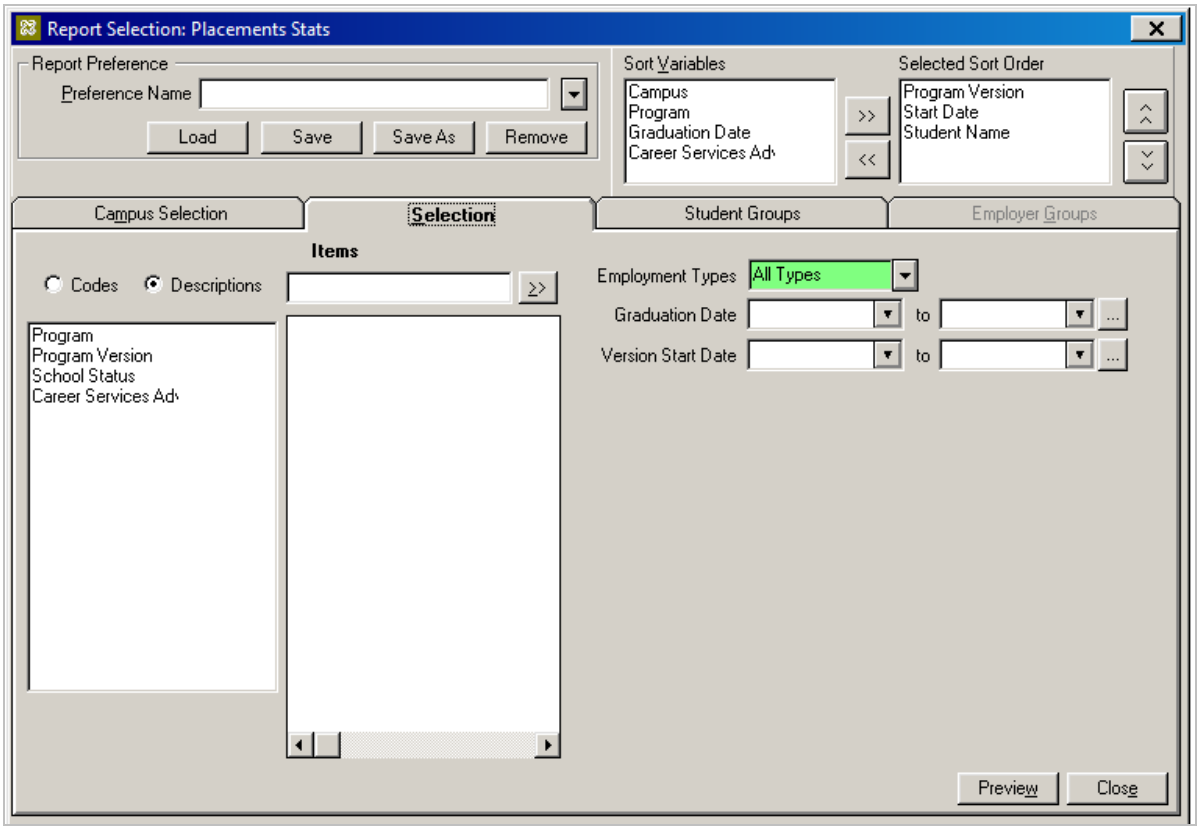
Placements Stats

The Placements Stats (Statistics) report is a summary of placement activity at your school. The report excludes Cancels and Drops. This report does not include Internship/Externship jobs.

To run the report:

1. Navigate to **Reports > Career Services > Placement Stats**. The Report Selection: Placement Stats form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Note: If you filter the report on Program or Program Version, Program and Program Version must be included on the sort.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report has a detail row for each program version. For each row on the report, the columns include:

   - Program Version Code
   - Scheduled Graduates
   - Actual Graduates

- Exit Interviews
- Not Available
- Waived Graduates
- Eligible Graduates
- Eligible Graduates Placed
- Other Eligible Place
- Percentage of Scheduled Graduates to Actual Graduates
- Percent of Scheduled Graduates Placed
- Percent of Eligible Graduates Placed

Placement Stats

rpt_plStats.rpt
ADMINISTRATOR

Employment Types: All Types
Campuses:
Campus Management Institute
- Version Start Date on or after 1/1/2008
- School Status (all)

Sorted by: Program Version, Start Date, Student Name

1/11/2013
4:18:35PM

	Schd Grads	Actual Grads	Exit Interv	Not Avail	Waived	Elig Grads	Elig Grads Placed	Other Elig Placed	Comp Grads	Place Sched	Place Elig Gr.
									Percentages		
111670 PV											
2011/07/01	7	0	0	0	0	0	0	0	0.00	0.00	0.00
	7	0	0	0	0	0	0	0	0.00	0.00	0.00
Bach. of General Management											
2008/01/23	1	0	0	0	0	0	0	0	0.00	0.00	0.00
2009/01/01	4	0	0	0	0	0	0	0	0.00	0.00	0.00
	5	0	0	0	0	0	0	0	0.00	0.00	0.00
Bachelor of Science in General Management											
2009/01/01	1	0	0	0	0	0	0	0	0.00	0.00	0.00
	1	0	0	0	0	0	0	0	0.00	0.00	0.00
Cert Financial Management											
2009/01/01	1	0	0	0	0	0	0	0	0.00	0.00	0.00
	1	0	0	0	0	0	0	0	0.00	0.00	0.00
Certificate in Facilities Management											
2009/01/01	1	0	0	0	0	0	0	0	0.00	0.00	0.00
	1	0	0	0	0	0	0	0	0.00	0.00	0.00
Credit Associate in Marketing Management											
2009/01/01	2	0	0	0	0	0	0	0	0.00	0.00	0.00
2010/01/05	1	0	0	0	0	0	0	0	0.00	0.00	0.00
	3	0	0	0	0	0	0	0	0.00	0.00	0.00
Faciliities Management for 2005S											
2008/10/02	1	0	0	0	0	0	0	0	0.00	0.00	0.00
2008/11/09	2	0	0	0	0	0	0	1	0.00	50.00	0.00
2009/08/01	1	0	0	0	0	0	0	0	0.00	0.00	0.00
	4	0	0	0	0	0	0	1	0.00	25.00	0.00
NDS Continuing Management Studies											
2009/08/01	1	0	0	0	0	0	0	0	0.00	0.00	0.00
	1	0	0	0	0	0	0	0	0.00	0.00	0.00
Program Bachelor Hautes Études en Hôtellerie Professions de L'Accueil											
2010/09/06	1	0	0	0	0	0	0	0	0.00	0.00	0.00
2011/09/19	3	0	0	0	0	0	0	0	0.00	0.00	0.00
	4	0	0	0	0	0	0	0	0.00	0.00	0.00
Totals	27	0	0	0	0	0	0	1	0.00	3.70	0.00

27 record(s) selected

Campus Management

Page 1 of 1

Placements Stats by Field of Study

The Placements Stats (Statistics) by Field of Study report is a summary of placement activity at your school. The report excludes Cancels and Drops.

Selection criteria include campus group and student status, program, and program version.

The report is sorted by program or program version. You can enter date ranges for graduation date and program version start date. You can select the Employment Type or types. You must be aware that the report will not function unless both Program and Program Version are in the sort. Simply change the order without removing any sort variable to change the order of the sort.

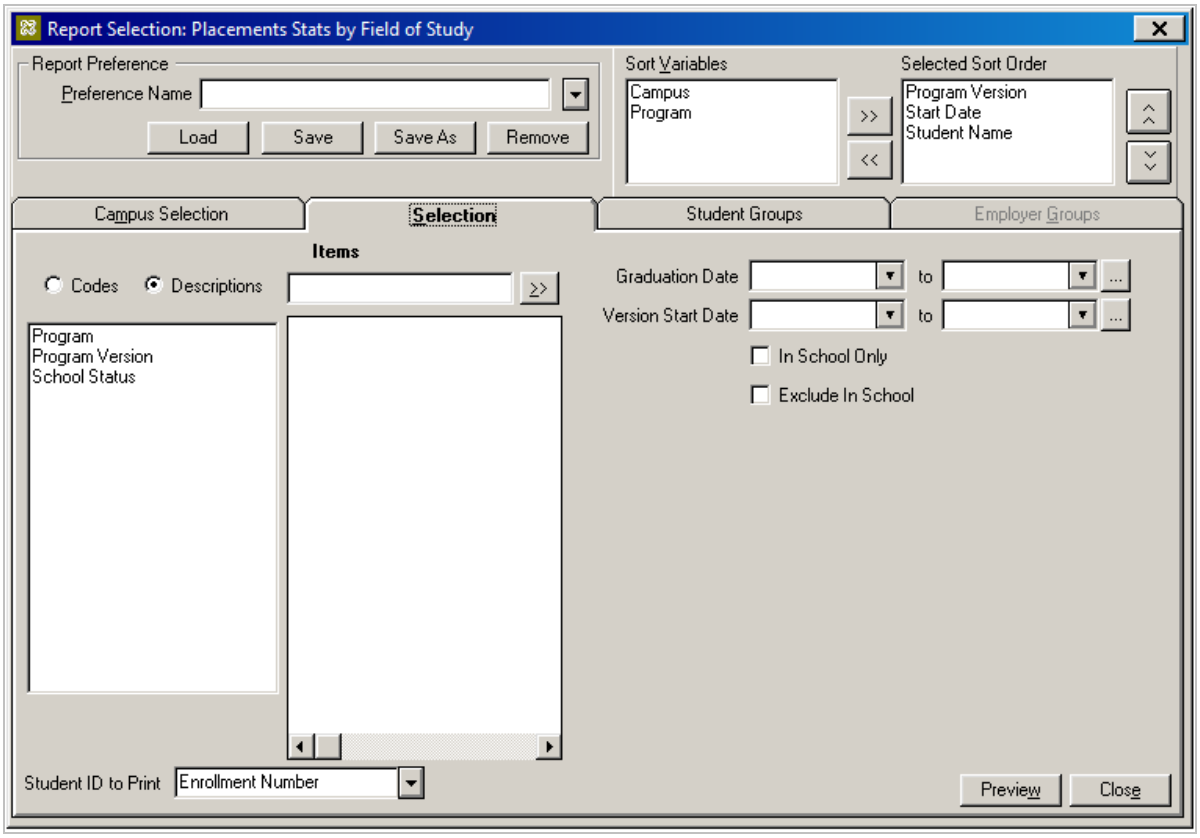
The report has a detail row for each program version. For each row on the report, the columns include program version code, eligible graduates, placed graduates, in field of study, out of field of study, related field of study, percentage of placements in field of study, percentage of placements out of field of study, and percentage of placements in related field of study.

Note: The report includes an option for the Field of Study column. This column reflects the option to show a count of 'placements by attestation' per program version. When Student Attestation is chosen as the option, the placement percentage behaves the same as using "placed in a related field". CampusNexus Student hides the Student Attestation columns in the reports if the data in the reports does not have at least one placement record with the value ‘Student Attestation’ for the In Field of Study field.

To run the report:

1. Navigate to **Reports > Career Services > Placements Stats by Field of Study**. The Report Selection: Placements Stats by Field of Study form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Note: If you filter the report on Program or Program Version, Program and Program Version must be included on the sort.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

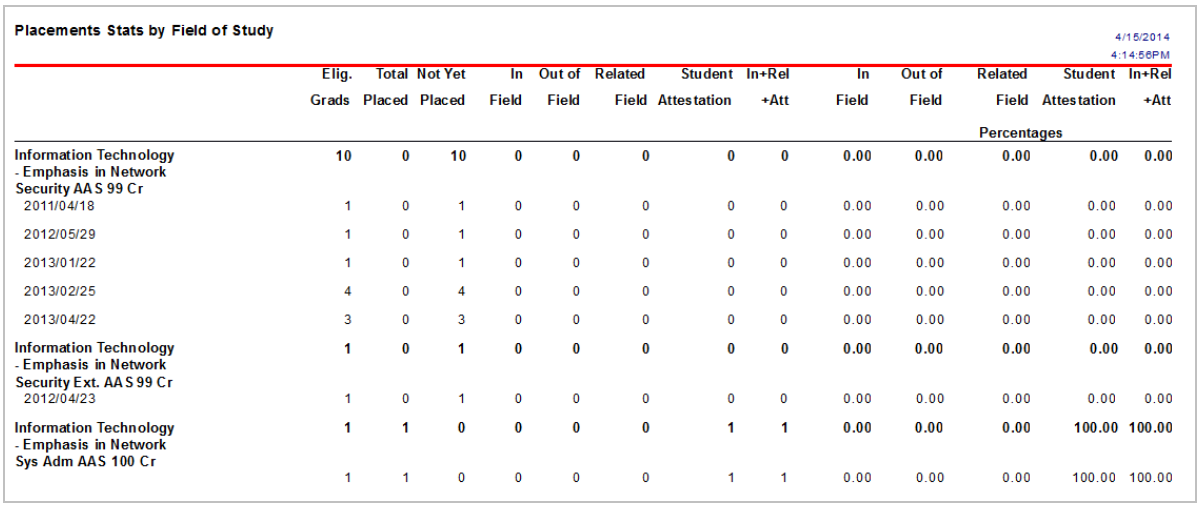
   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report has a detail row for each program version. For each row on the report, the columns include:

   - Program Version Code
   - Scheduled Graduates
   - Actual Graduates
   - Exit Interviews
   - Not Available
   - Waived Graduates
   - Eligible Graduates
   - Eligible Graduates Placed
   - Eligible Graduates Not Yet Placed
   - Eligible Graduates Placed in Field
   - Eligible Graduates Placed Out of Field
   - Eligible Graduates Placed in Related Field
   - Eligible Graduates Placed in Student Attestation
   - Eligible Graduates Placed in Related Attestation
   - Other Eligible Place
   - Percentage of Scheduled Graduates to Actual Graduates
   - Percent of Scheduled Graduates Placed
   - Percent of Eligible Graduates Placed
   - Percent of Eligible Graduates Placed in Field

- Percent of Eligible Graduates Placed Out of Field
- Percent of Eligible Graduates Placed in Related Field
- Percent of Eligible Graduates Placed in Student Attestation
- Percent of Eligible Graduates Placed in Related Attestation



Placements Stats by Field of Study

4/15/2014
4:14:56PM

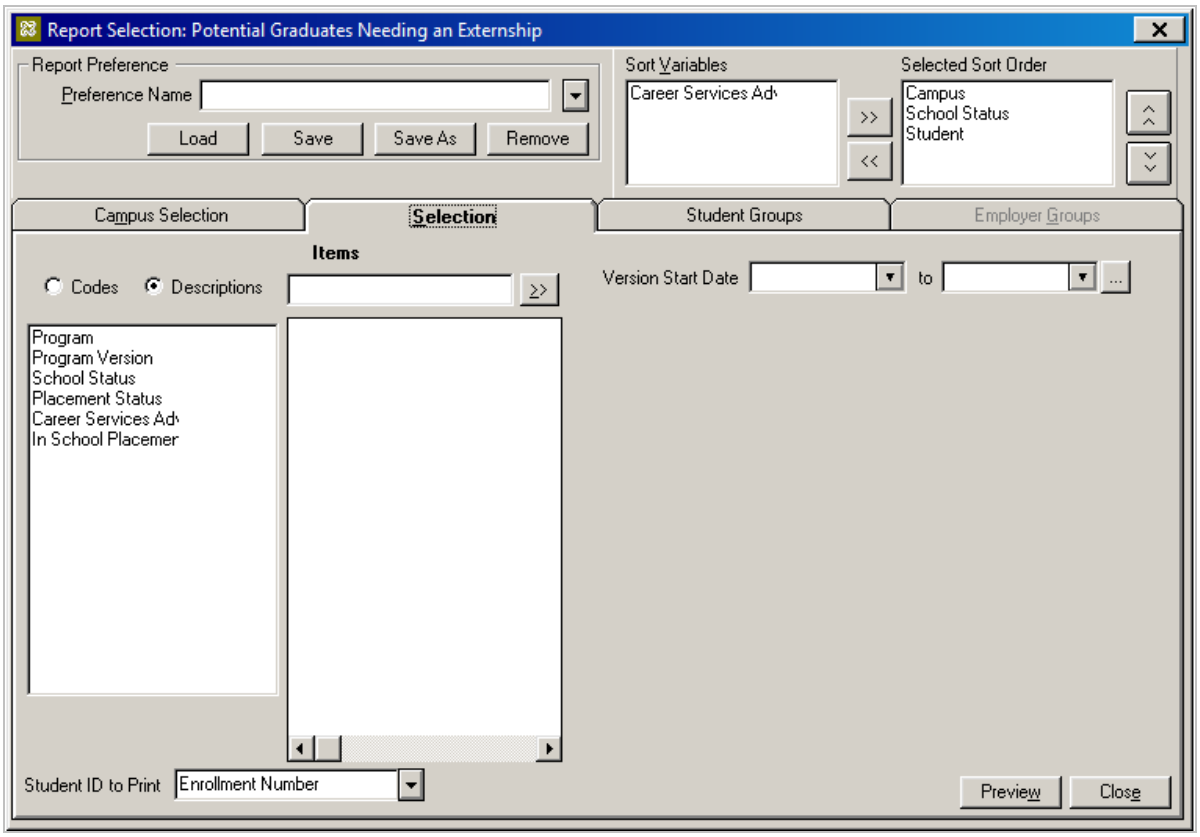
	Elig. Grads	Total Placed	Not Yet Placed	In Field	Out of Field	Related Field	Student Attestation	In+Rel +Att	In Field	Out of Field	Related Field	Student Attestation	In+Rel +Att
									Percentages				
Information Technology - Emphasis in Network Security AAS 99 Cr	**10**	**0**	**10**	**0**	**0**	**0**	**0**	**0**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**
2011/04/18	1	0	1	0	0	0	0	0	0.00	0.00	0.00	0.00	0.00
2012/05/29	1	0	1	0	0	0	0	0	0.00	0.00	0.00	0.00	0.00
2013/01/22	1	0	1	0	0	0	0	0	0.00	0.00	0.00	0.00	0.00
2013/02/25	4	0	4	0	0	0	0	0	0.00	0.00	0.00	0.00	0.00
2013/04/22	3	0	3	0	0	0	0	0	0.00	0.00	0.00	0.00	0.00
Information Technology - Emphasis in Network Security Ext. AAS 99 Cr	**1**	**0**	**1**	**0**	**0**	**0**	**0**	**0**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**
2012/04/23	1	0	1	0	0	0	0	0	0.00	0.00	0.00	0.00	0.00
Information Technology - Emphasis in Network Sys Adm AAS 100 Cr	**1**	**1**	**0**	**0**	**0**	**0**	**1**	**1**	**0.00**	**0.00**	**0.00**	**100.00**	**100.00**
	1	1	0	0	0	0	1	1	0.00	0.00	0.00	100.00	100.00

Potential Graduates Needing an Externship

This report lists students who are scheduled for a course that is coded as an externship and are not set up with an employer for the externship.

To run the report:

1. Navigate to **Reports > Career Services > Potential Graduates Needing an Externship**. The Report Selection: Potential Graduates Needing an Externship form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

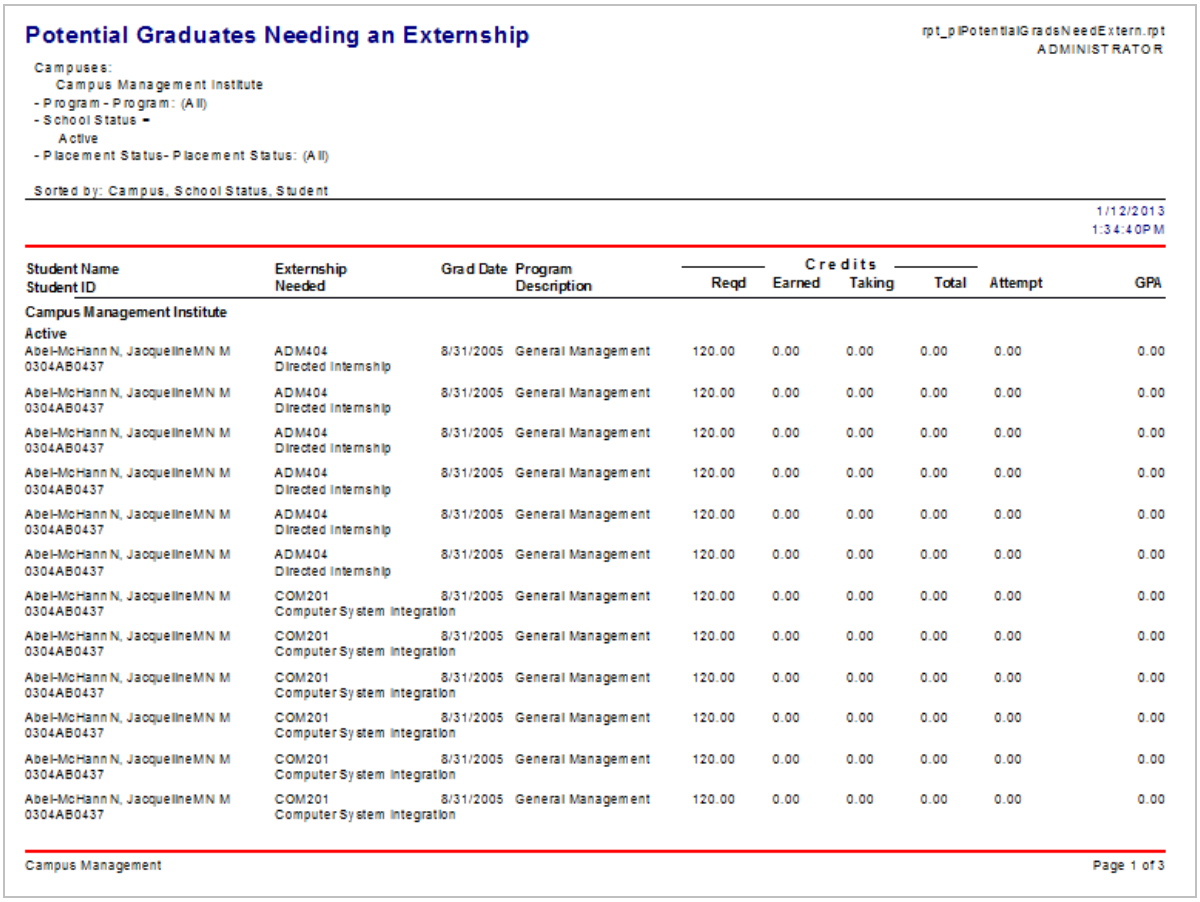
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name and ID
   - Externship Needed
   - Graduation Date
   - Program Description

- Credits required, credits, earned, credits taking, total credits, and credits attempted
- GPA

Note: The student's 'Credits Taking' calculation includes only Current courses and not Scheduled courses.



Potential Graduates Needing an Externship

rpt_plPotentialGradsNeedExtern.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- Program - Program: (All)
- School Status -
Active
- Placement Status- Placement Status: (All)

Sorted by: Campus, School Status, Student

1/12/2013
1:34:40PM

Student Name Student ID	Externship Needed	Grad Date	Program Description	Credits Reqd	Earned	Taking	Total	Attempt	GPA
Campus Management Institute									
Active									
Abel-McHann N, JacquelineMN M 0304AB0437	ADM404 Directed Internship	8/31/2005	General Management	120.00	0.00	0.00	0.00	0.00	0.00
Abel-McHann N, JacquelineMN M 0304AB0437	ADM404 Directed Internship	8/31/2005	General Management	120.00	0.00	0.00	0.00	0.00	0.00
Abel-McHann N, JacquelineMN M 0304AB0437	ADM404 Directed Internship	8/31/2005	General Management	120.00	0.00	0.00	0.00	0.00	0.00
Abel-McHann N, JacquelineMN M 0304AB0437	ADM404 Directed Internship	8/31/2005	General Management	120.00	0.00	0.00	0.00	0.00	0.00
Abel-McHann N, JacquelineMN M 0304AB0437	ADM404 Directed Internship	8/31/2005	General Management	120.00	0.00	0.00	0.00	0.00	0.00
Abel-McHann N, JacquelineMN M 0304AB0437	ADM404 Directed Internship	8/31/2005	General Management	120.00	0.00	0.00	0.00	0.00	0.00
Abel-McHann N, JacquelineMN M 0304AB0437	COM201 Computer System Integration	8/31/2005	General Management	120.00	0.00	0.00	0.00	0.00	0.00
Abel-McHann N, JacquelineMN M 0304AB0437	COM201 Computer System Integration	8/31/2005	General Management	120.00	0.00	0.00	0.00	0.00	0.00
Abel-McHann N, JacquelineMN M 0304AB0437	COM201 Computer System Integration	8/31/2005	General Management	120.00	0.00	0.00	0.00	0.00	0.00
Abel-McHann N, JacquelineMN M 0304AB0437	COM201 Computer System Integration	8/31/2005	General Management	120.00	0.00	0.00	0.00	0.00	0.00
Abel-McHann N, JacquelineMN M 0304AB0437	COM201 Computer System Integration	8/31/2005	General Management	120.00	0.00	0.00	0.00	0.00	0.00
Abel-McHann N, JacquelineMN M 0304AB0437	COM201 Computer System Integration	8/31/2005	General Management	120.00	0.00	0.00	0.00	0.00	0.00

Campus Management

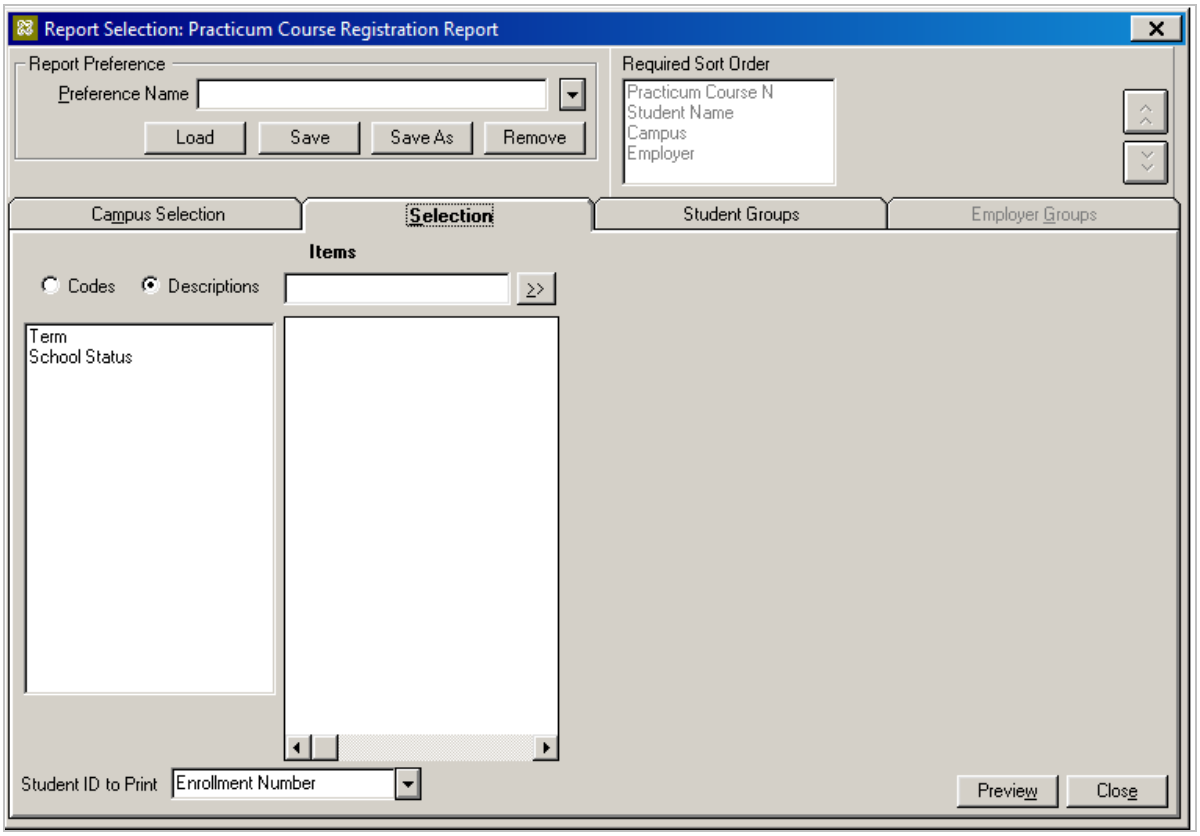
Page 1 of 3

Practicum Course Registration Report

This report lists details regarding practicum course registrations.

To run the report:

1. Navigate to **Reports > Career Services > Practicum Course Registration Report**. The Report Selection: Practicum Course Registration Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

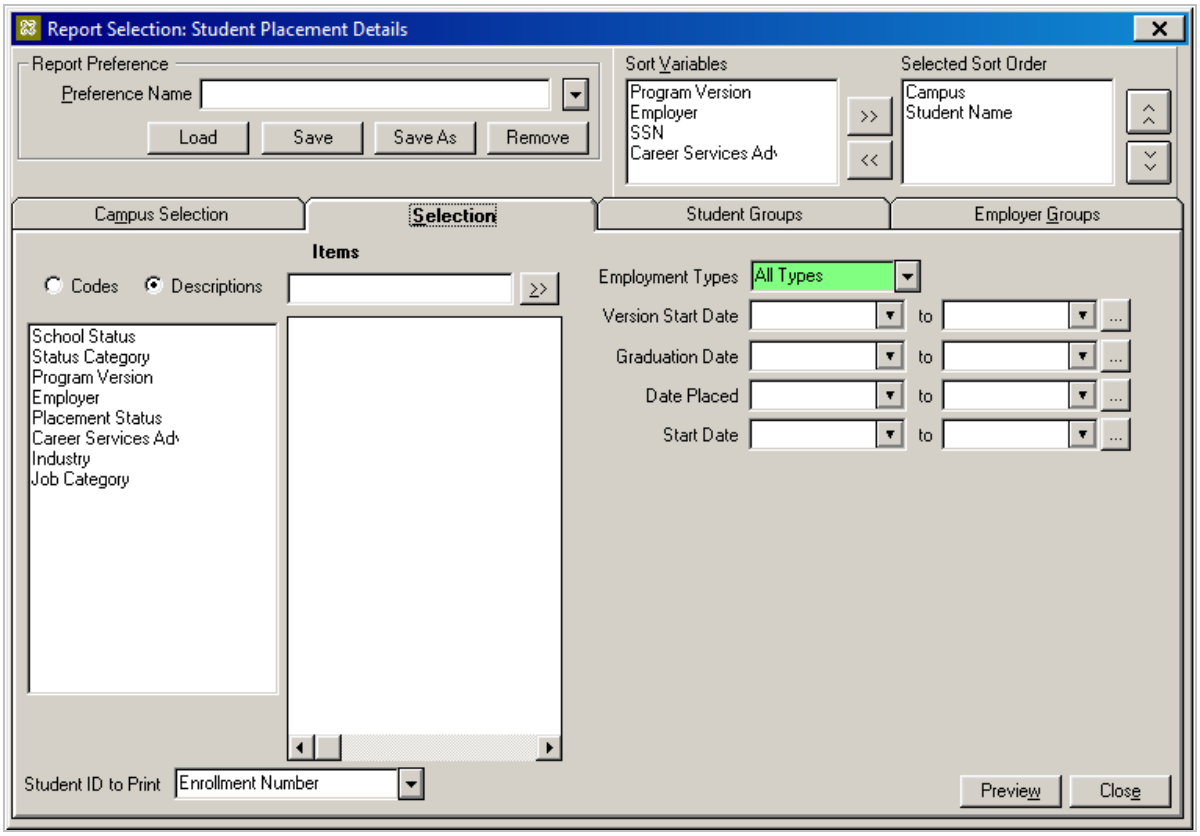
   - Practicum
   - Course Name
   - Student Name
   - Campus
   - Employer

Student Placement Details

This report provides placement details for an individual student.

To run the report:

1. Navigate to **Reports > Career Services > Student Placement Details**. The Report Selection: Student Placement Details form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter the report data.

   Note: If you filter data by Student Groups, the Selection tab and Employer Groups tab filters do not apply.

5. *Optional*: You can also use the **Employer Groups** tab to filter the report data.

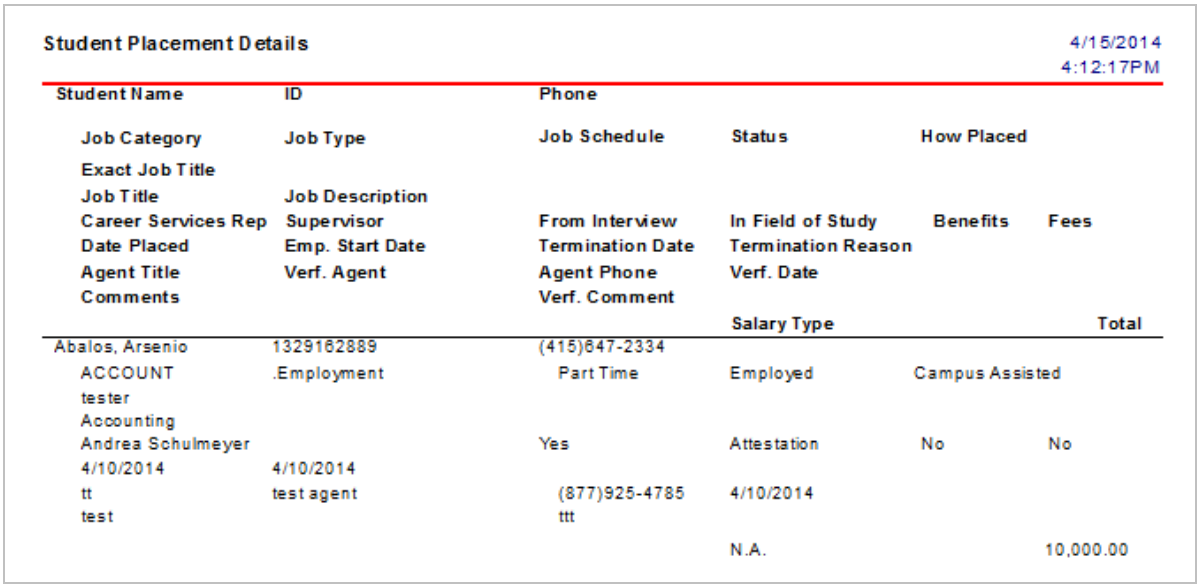
   Note: If you filter data by Employer Groups, the Selection tab and Student Groups tab filters do not apply.

6. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name, ID, and Phone
   - Job Category
   - Exact Job Title

- Job Title
- Career Services Representative
- Date Placed
- Agent Title
- Comments
- Job Type
- Job Description
- Supervisor
- Employment Start Date
- Verification Agent
- Job Schedule
- From Interview
- Termination Date
- Agent Phone
- Verification Comment
- Status
- In Field of Study
- Termination Reason
- Verification Date
- Salary Type
- How Placed
- Benefits
- Fees
- Total



Student Placement Details 4/15/2014 4:12:17PM

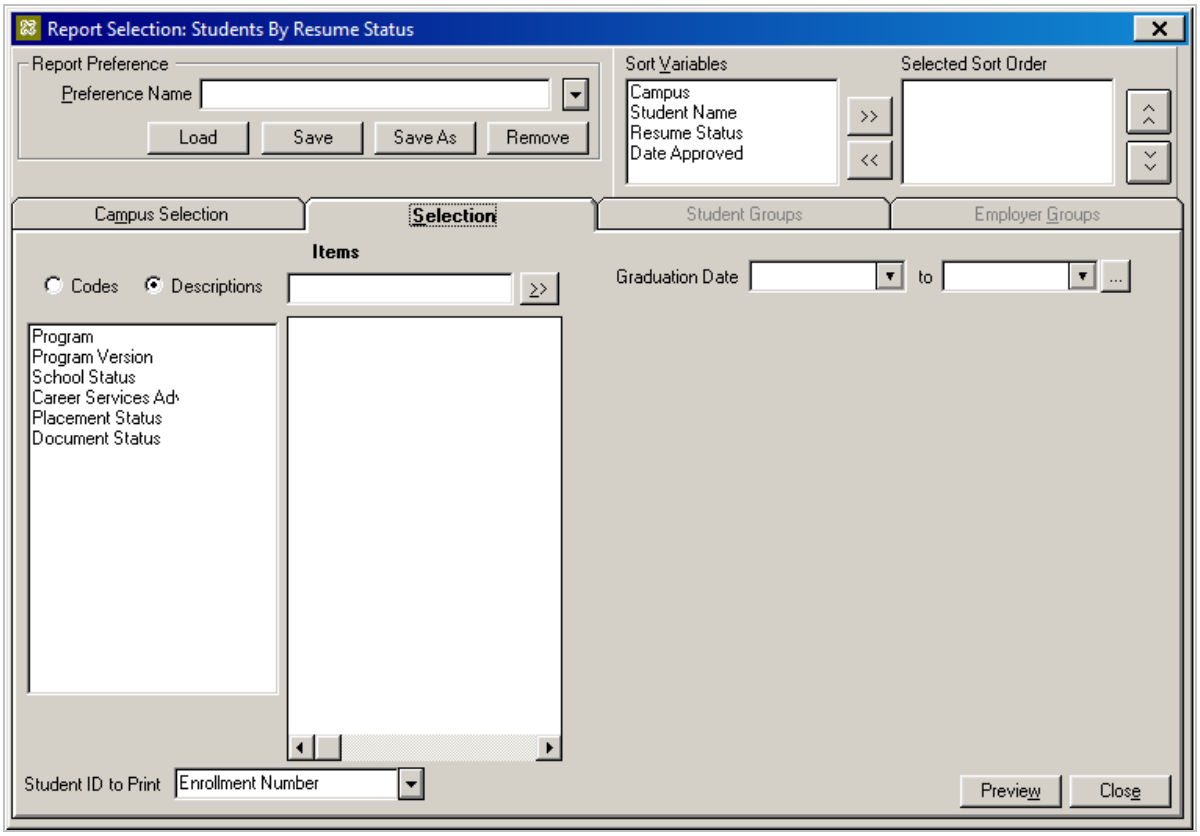
Student Name	ID	Phone				
Job Category	Job Type	Job Schedule	Status	How Placed		
Exact Job Title						
Job Title	Job Description					
Career Services Rep	Supervisor	From Interview	In Field of Study	Benefits	Fees	
Date Placed	Emp. Start Date	Termination Date	Termination Reason			
Agent Title	Verf. Agent	Agent Phone	Verf. Date			
Comments		Verf. Comment				
			Salary Type			Total
Abalos, Arsenio	1329162889	(415)647-2334				
ACCOUNT	.Employment	Part Time	Employed	Campus Assisted		
tester						
Accounting						
Andrea Schulmeyer		Yes	Attestation	No	No	
4/10/2014	4/10/2014					
tt	test agent	(877)925-4785	4/10/2014			
test		ttt				
			N.A.			10,000.00

Students by Resume Status

This report lists details regarding students by the status of their resumes.

To run the report:

1. Navigate to **Reports > Career Services > Students by Resume Status**. The Report Selection: Students by Resume Status form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

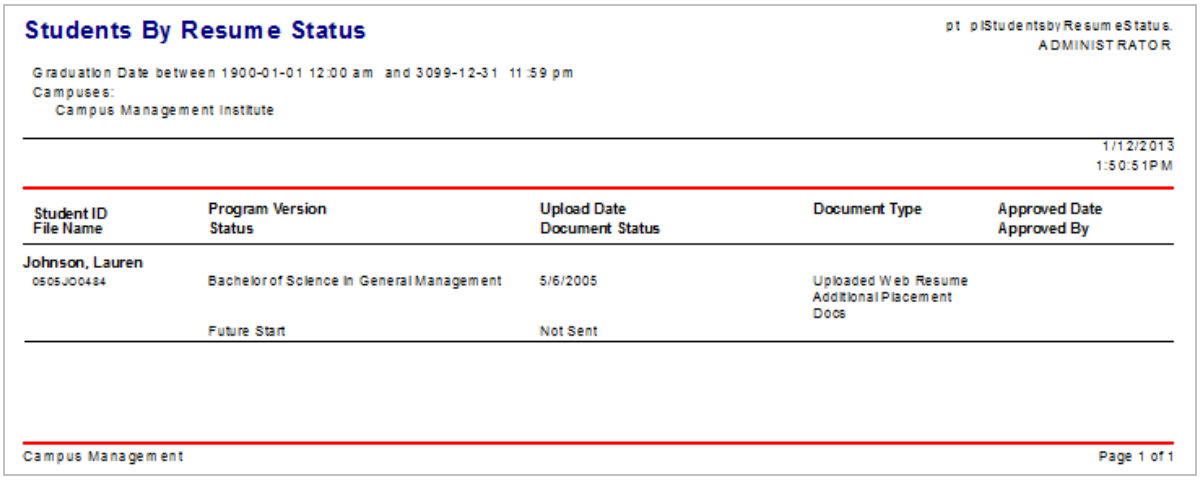


4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student ID
   - File Name
   - Program Version
   - Status
   - Upload Date
   - Document Status
   - Document Type
   - Approved Date

- Approved by



Students By Resume Status

pt_plStudentsbyResumeStatus.
ADMINISTRATOR

Graduation Date between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Campuses:
Campus Management Institute

1/12/2013
1:50:51PM

Student ID File Name	Program Version Status	Upload Date Document Status	Document Type	Approved Date Approved By
Johnson, Lauren				
0505JO0484	Bachelor of Science in General Management	5/6/2005	Uploaded Web Resume Additional Placement Docs	
	Future Start	Not Sent		

Campus Management

Page 1 of 1

Cube Report Placement Stats

This cube report allows you to analyze placement statistics. You can select the Employment Type or types.

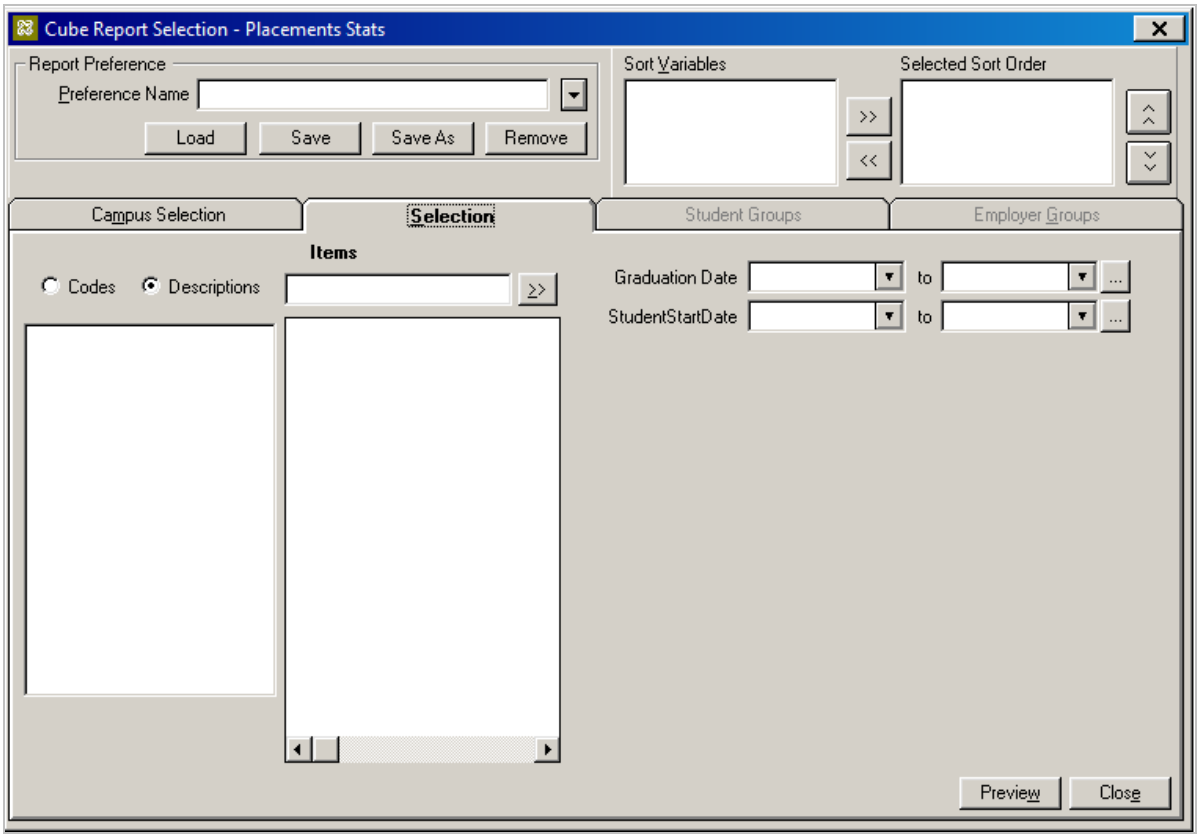
To run the report:

1. Navigate to **Reports > Career Services > Placement Stats** (Cube Report). The Cube Report Selection: Placement Stats form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Notes:

   Graduation Date range and Student Start Date range are available on the report selection form.

   - If you enter a Graduation Date range, the program will gather all rows from the enrollment table where the graduation date is within your entered date range and the Status Category is "P - Placement".
   - If you enter a Student Start Sate range, the program will gather all rows from the enrollment table where the start date is within your entered date range and the status category is "P - Placement".



4. Click **Preview**. The cube report is assembled and displayed.

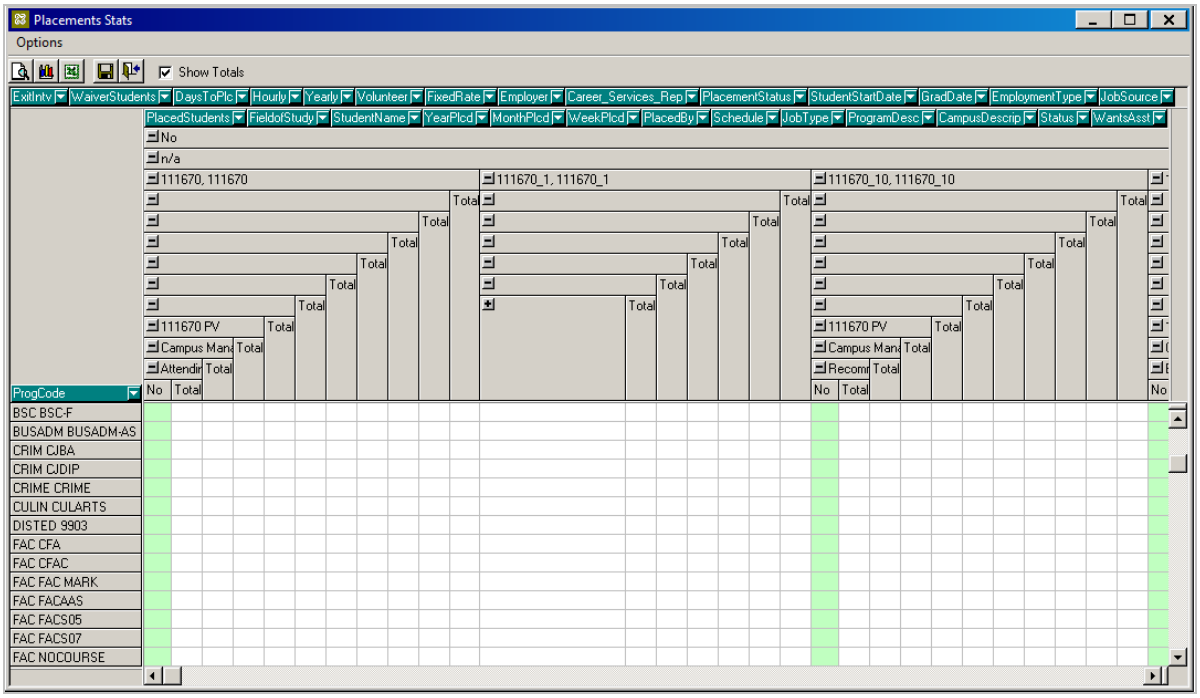
   The following variables are available for use in this cube report:

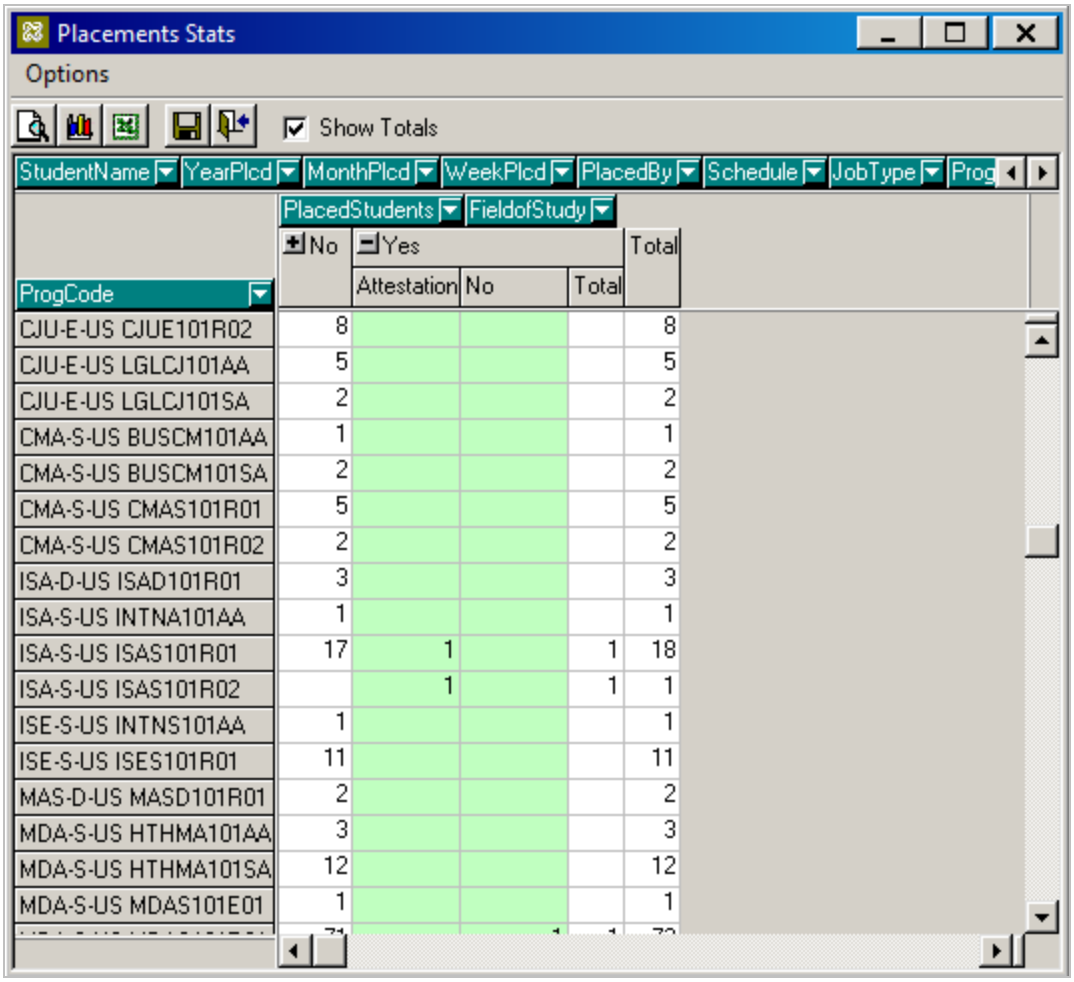
- Program Code
- Program Description
- Student Name
- Job Type
- Job Source
- Volunteer
- Year Placed
- Month Placed
- Week Placed
- Placed By
- Schedule (full time or part time)
- Campus Description
- Student Status
- Graduation Date
- Wants Assistance
- Exit Interviewed
- Days to Placement
- Hourly Wages
- Yearly Salary
- Flat Rate
- Employer
- Career Services Representative
- Eligible Students
- Waiver Students
- Placed Students
- Placement Status
- Student Start Date
- Field of Study

Drag the variables to the vertical or horizontal axes as needed to get the cross-tabulated spreads. The cube is initialized with Program Code as the Y axis (rows) and Placed Students and Field of Study as the X axis (columns).

In the cases where a student has multiple placement records, add Employer to the parameter selection to see all of a student's placement information.

Note: The report was designed to work with up to three elements. The best practice is to keep three sort elements and to "swap" Program for Program Version and Grad Date for Start Date.





The above cube report displays Placed Students in Field of Study by Attestation.

Loan Management Reports

Navigate to **Reports > Loan Management** to access the following Loan Management reports:

- Cohort Rate Report
- Exit Interview
- Expected Graduates with Loans
- Loan Status Report

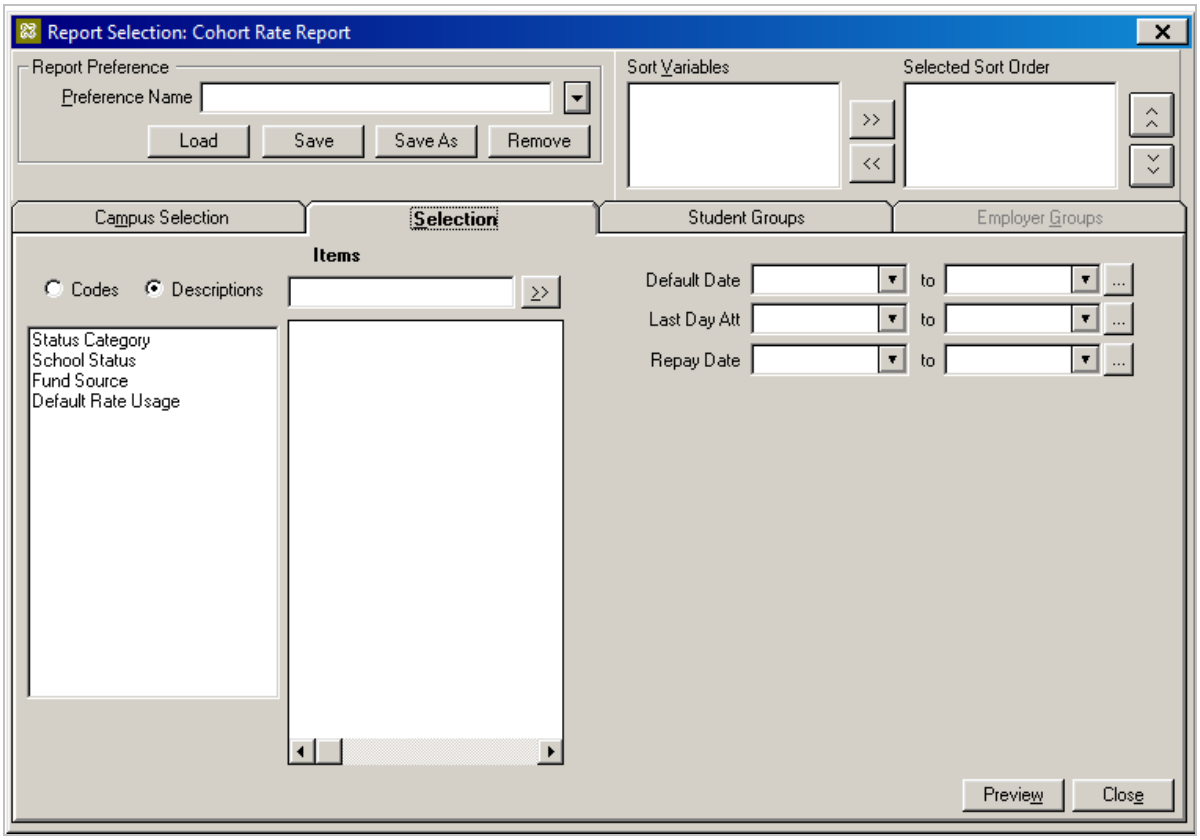
Note: The System Administrator must set up security rights to view, print, or export reports. Staff members and staff groups must be given security rights to view, print, and/or export reports. This does not apply to custom reports.

Cohort Rate Report

This report provides a review of students who have financial aid loans outstanding from your school. Details on the report include the number of students who went into default, the number of students who went into repayment, and the Cohort Rate (number defaulted divided by number in repayment). The report lists all students in each group.

To run the report:

1. Navigate to **Reports > Loan Management > Cohort Rate Report**. The Report Selection: Cohort Rate Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

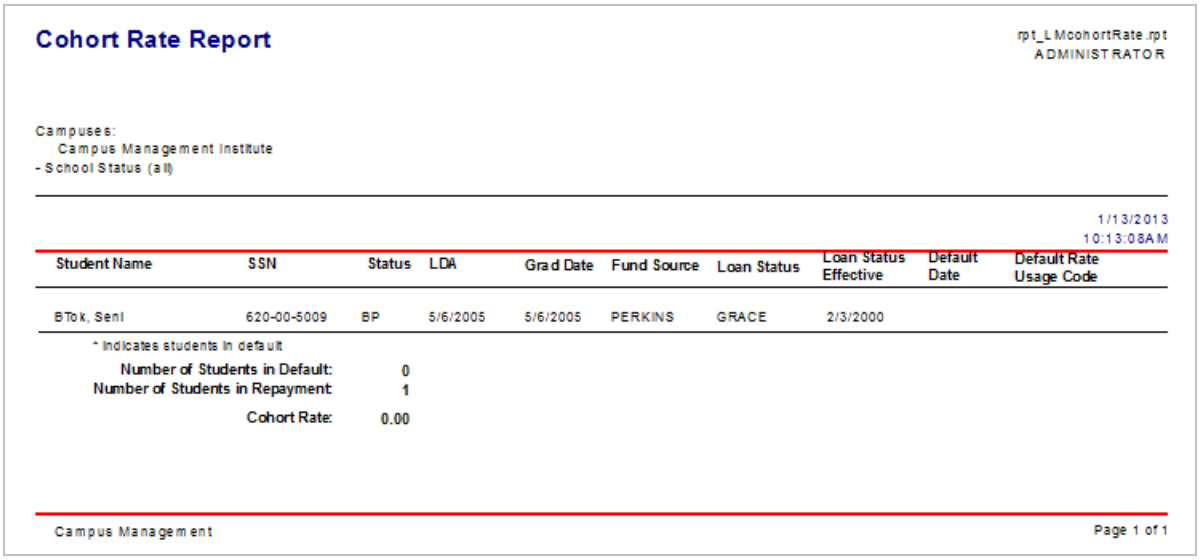
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - SSN
   - Status
   - Last Date of attendance (LDA)

- Graduation Date
- Fund Source
- Loan Status
- Loan Status Effective Date
- Default Date
- Default Rate Usage Code

An asterisk (*) appears beside students that are counted in the default group.



Cohort Rate Report

rpt_LMcohortRate.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- School Status (all)

1/13/2013
10:13:08AM

Student Name	SSN	Status	LDA	Grad Date	Fund Source	Loan Status	Loan Status Effective	Default Date	Default Rate Usage Code
BTok, Seni	620-00-5009	BP	5/6/2005	5/6/2005	PERKINS	GRACE	2/3/2000		

* Indicates students in default

Number of Students in Default: 0
Number of Students in Repayment: 1
Cohort Rate: 0.00

Campus Management

Page 1 of 1

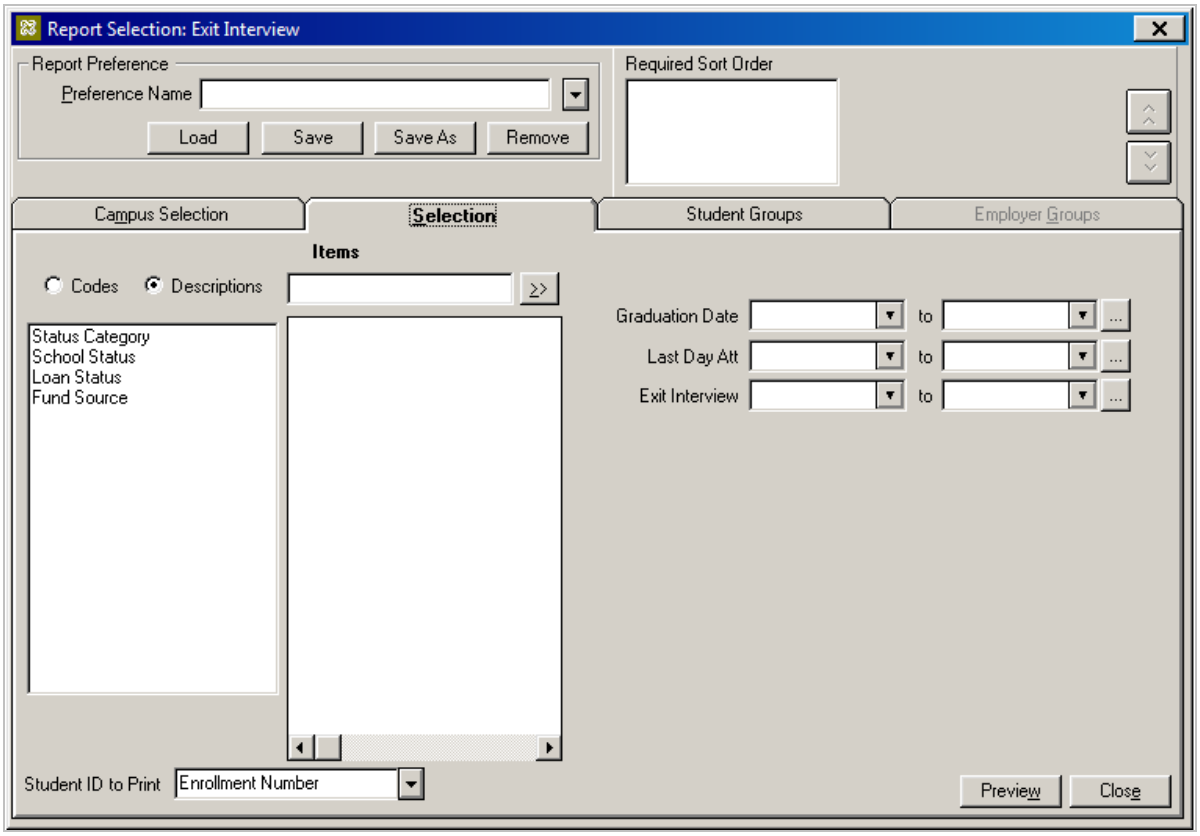
Exit Interview

This report can be used by the Loan Management Office to conduct exit interviews with departing students. This report can be printed for individual students from the **View > Loan Management > Loan Management > Print Exit Interview** menu option. From the Reports menu, you can select a group of students for which to print exit interview reports.

Two fields (**Interest Rate** and **Default # of Monthly Payments**) on the **Lists > Financial Aid > Lender > Payment & Interest** tab allow you to configure the interest rate and default number of payments for repaying loans. The values, if entered, automatically calculate the estimated monthly payments within the Exit interview report.

To run the report:

1. Navigate to **Reports > Loan Management > Exit Interview**. The Report Selection: Exit Interview form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report provides page breaks at the beginning of each student listed and displays the following student information:

- Student Name and ID
- Phone
- Address
- Graduation Date
- Last Date of Attendance (LDA)
- Exit Interview Date

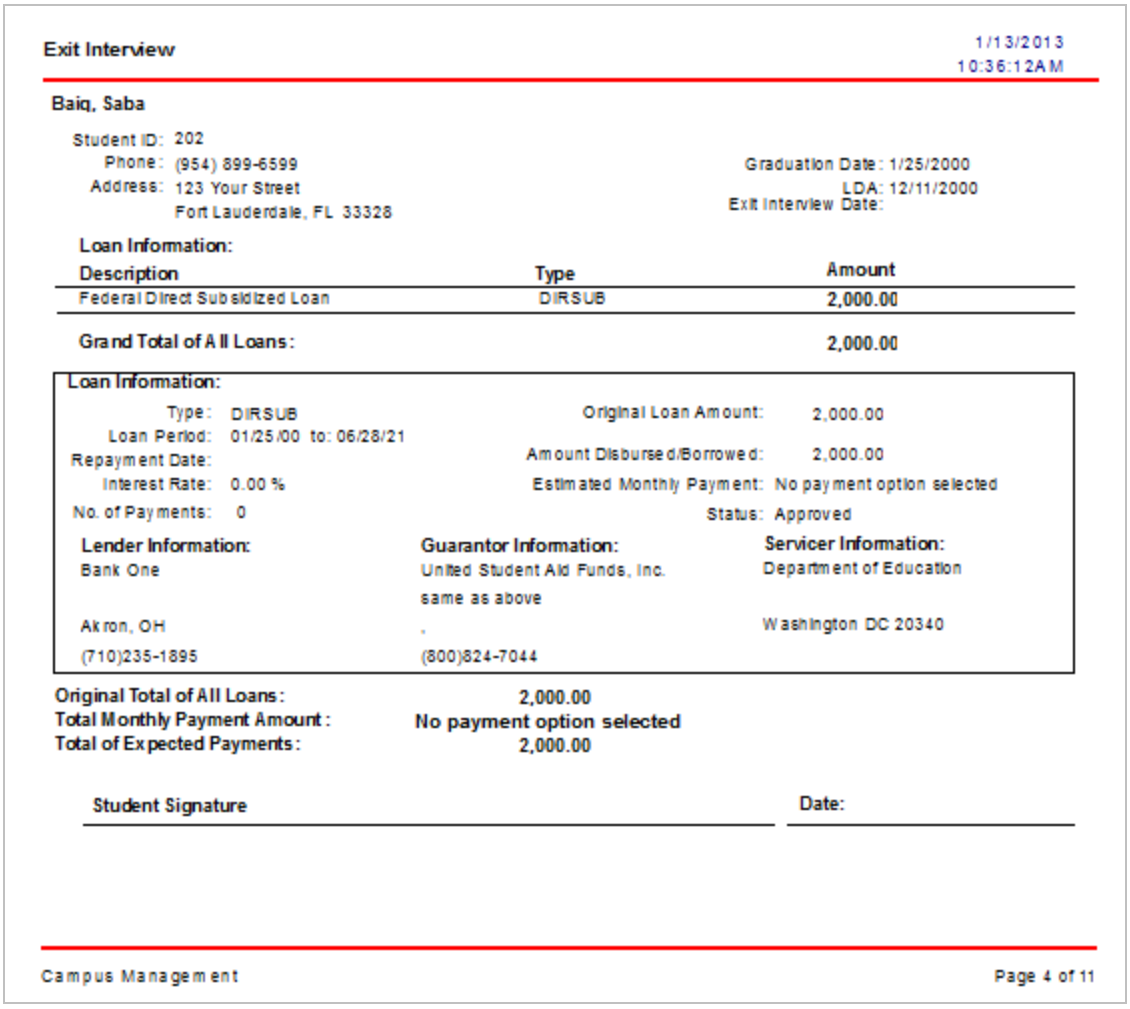
Loan information:

- Loan Description
- Loan Type
- Loan Period
- Repayment Date
- Interest Rate
- Number of Payments
- Original Loan Amount
- Amount Disbursed/Borrowed
- Estimated Monthly Payment
- Status
- Lender's name and address
- Guarantor's name and address
- Servicer's name and address

Totals:

- Original Total of all Loans
- Total Monthly Payment Amount
- Total of Expected Payments

A signature line for the student is provided on the form. In the case of PLUS and DIRPLUS loan type(s), a signature line for the student's parent is provided.



Exit Interview 1/13/2013 10:36:12AM

Baiq, Saba

Student ID: 202
Phone: (954) 899-6599
Address: 123 Your Street
Fort Lauderdale, FL 33328

Graduation Date: 1/25/2000
LDA: 12/11/2000
Exit Interview Date:

Loan Information:

Description	Type	Amount
Federal Direct Subsidized Loan	DIRSUB	2,000.00
Grand Total of All Loans:		**2,000.00**

Loan Information:

Type: DIRSUB
Loan Period: 01/25/00 to: 06/28/21
Repayment Date:
Interest Rate: 0.00 %
No. of Payments: 0

Original Loan Amount: 2,000.00
Amount Disbursed/Borrowed: 2,000.00
Estimated Monthly Payment: No payment option selected
Status: Approved

Lender Information:
Bank One

Akron, OH
(710)235-1895

Guarantor Information:
United Student Aid Funds, Inc.
same as above
.
(800)824-7044

Servicer Information:
Department of Education

Washington DC 20340

Original Total of All Loans: 2,000.00
Total Monthly Payment Amount: No payment option selected
Total of Expected Payments: 2,000.00

Student Signature **Date:**

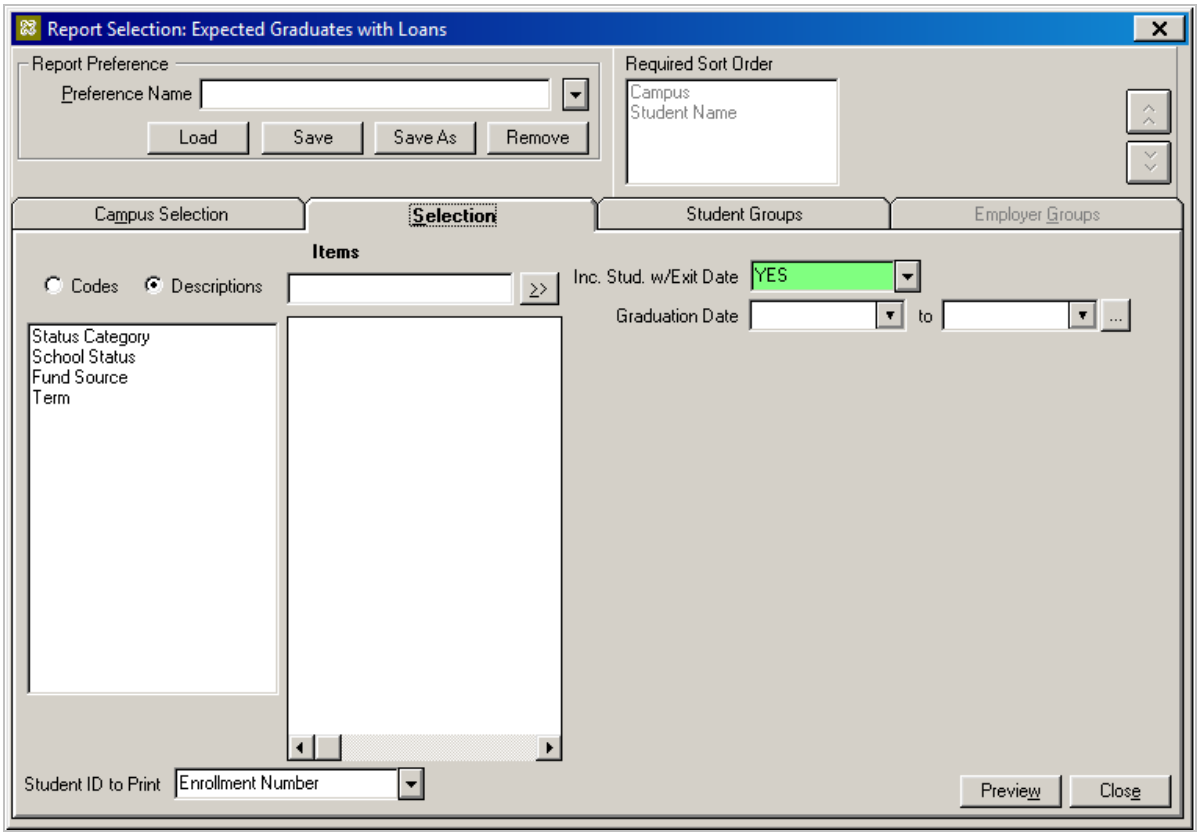
Campus Management Page 4 of 11

Expected Graduates with Loans

This report displays a list of expected graduates with loans.

To run the report:

1. Navigate to **Reports > Loan Management > Expected Graduates with Loans**. The Report Selection: Expected Graduates with Loans form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

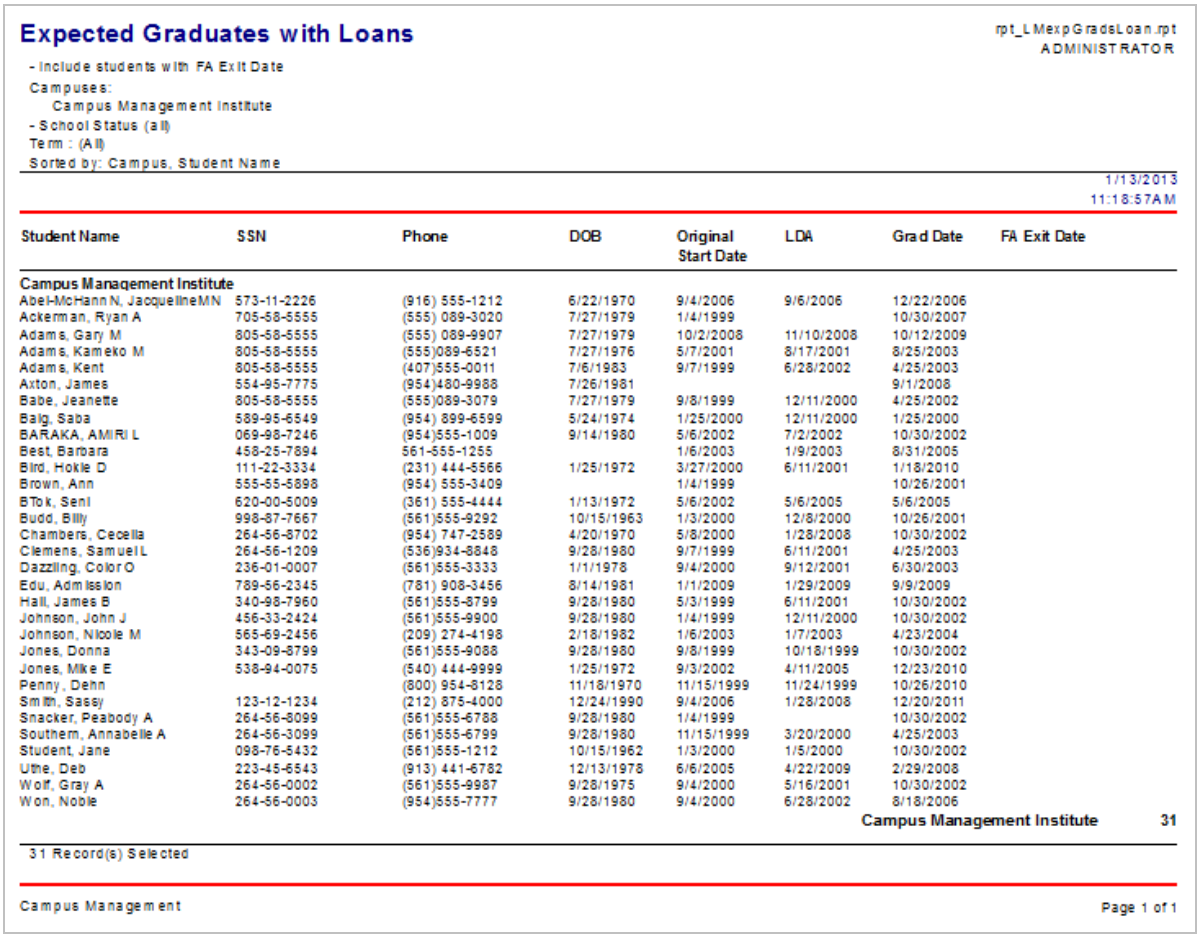
   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - SSN
   - Phone
   - Date of Birth (DOB)
   - Original Start Date
   - Last Date of Attendance (LDA)

- Graduation Date
- FA Exit Date



Expected Graduates with Loans

rpt_LMexpGradsLoan.rpt
ADMINISTRATOR

- Include students with FA Exit Date
Campuses:
Campus Management Institute
- School Status (all)
Term : (All)
Sorted by: Campus, Student Name

1/13/2013
11:18:57AM

Student Name	SSN	Phone	DOB	Original Start Date	LDA	Grad Date	FA Exit Date
Campus Management Institute							
Abel-McHann N, JacquelineMN	573-11-2226	(916) 555-1212	6/22/1970	9/4/2006	9/6/2006	12/22/2006	
Ackerman, Ryan A	705-58-5555	(555) 089-3020	7/27/1979	1/4/1999		10/30/2007	
Adams, Gary M	805-58-5555	(555) 089-9907	7/27/1979	10/2/2008	11/10/2008	10/12/2009	
Adams, Kameko M	805-58-5555	(555)089-6521	7/27/1976	5/7/2001	8/17/2001	8/25/2003	
Adams, Kent	805-58-5555	(407)555-0011	7/6/1983	9/7/1999	6/28/2002	4/25/2003	
Axton, James	554-95-7775	(954)480-9988	7/26/1981			9/1/2008	
Babe, Jeanette	805-58-5555	(555)089-3079	7/27/1979	9/8/1999	12/11/2000	4/25/2002	
Balg, Saba	589-95-6549	(954) 899-6599	5/24/1974	1/25/2000	12/11/2000	1/25/2000	
BARAKA, AMIRI L	069-98-7246	(954)555-1009	9/14/1980	5/6/2002	7/2/2002	10/30/2002	
Best, Barbara	458-25-7894	561-555-1255		1/6/2003	1/9/2003	8/31/2005	
Bird, Hokie D	111-22-3334	(231) 444-5566	1/25/1972	3/27/2000	6/11/2001	1/18/2010	
Brown, Ann	555-55-5898	(954) 555-3409		1/4/1999		10/26/2001	
BTok, Seni	620-00-5009	(361) 555-4444	1/13/1972	5/6/2002	5/6/2005	5/6/2005	
Budd, Billy	998-87-7667	(561)555-9292	10/15/1963	1/3/2000	12/8/2000	10/26/2001	
Chambers, Cecelia	264-56-8702	(954) 747-2589	4/20/1970	5/8/2000	1/28/2008	10/30/2002	
Clemens, Samuel L	264-56-1209	(536)934-8848	9/28/1980	9/7/1999	6/11/2001	4/25/2003	
Dazzling, Color O	236-01-0007	(561)555-3333	1/1/1978	9/4/2000	9/12/2001	6/30/2003	
Edu, Admission	789-56-2345	(781) 908-3456	8/14/1981	1/1/2009	1/29/2009	9/9/2009	
Hall, James B	340-98-7960	(561)555-8799	9/28/1980	5/3/1999	6/11/2001	10/30/2002	
Johnson, John J	456-33-2424	(561)555-9900	9/28/1980	1/4/1999	12/11/2000	10/30/2002	
Johnson, Nicole M	565-69-2456	(209) 274-4198	2/18/1982	1/6/2003	1/7/2003	4/23/2004	
Jones, Donna	343-09-8799	(561)555-9088	9/28/1980	9/8/1999	10/18/1999	10/30/2002	
Jones, Mike E	538-94-0075	(540) 444-9999	1/25/1972	9/3/2002	4/11/2005	12/23/2010	
Penny, Dehn		(800) 954-8128	11/18/1970	11/15/1999	11/24/1999	10/26/2010	
Smith, Sassy	123-12-1234	(212) 875-4000	12/24/1990	9/4/2006	1/28/2008	12/20/2011	
Snacker, Peabody A	264-56-8099	(561)555-6788	9/28/1980	1/4/1999		10/30/2002	
Southern, Annabelle A	264-56-3099	(561)555-6799	9/28/1980	11/15/1999	3/20/2000	4/25/2003	
Student, Jane	098-76-5432	(561)555-1212	10/15/1962	1/3/2000	1/5/2000	10/30/2002	
Uthe, Deb	223-45-6543	(913) 441-6782	12/13/1978	6/6/2005	4/22/2009	2/29/2008	
Wolf, Gray A	264-56-0002	(561)555-9987	9/28/1975	9/4/2000	5/16/2001	10/30/2002	
Won, Noble	264-56-0003	(954)555-7777	9/28/1980	9/4/2000	6/28/2002	8/18/2006	
						Campus Management Institute	**31**

31 Record(s) Selected

Campus Management

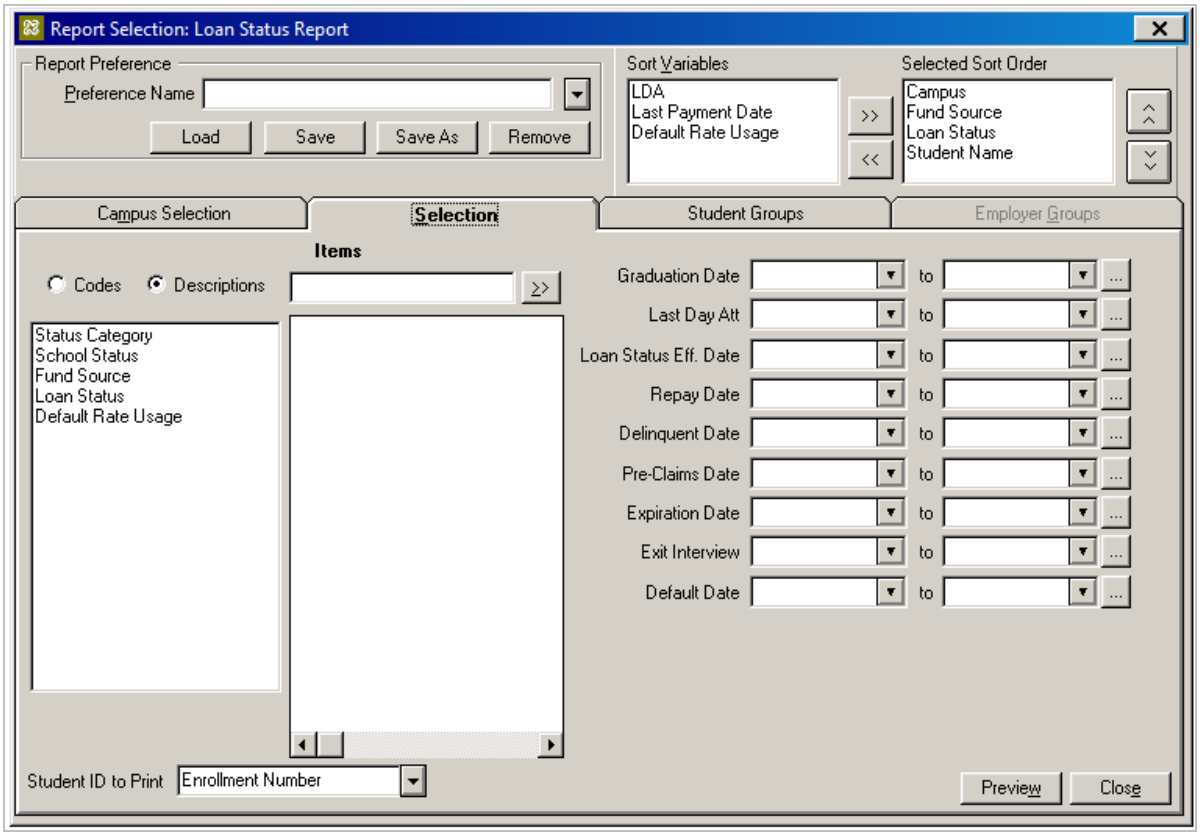
Page 1 of 1

Loan Status Report

This report provides a detailed and summary view of student loans at your institution.

To run the report:

1. Navigate to **Reports > Loan Management > Loan Status Report**. The Report Selection: Loan Status Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

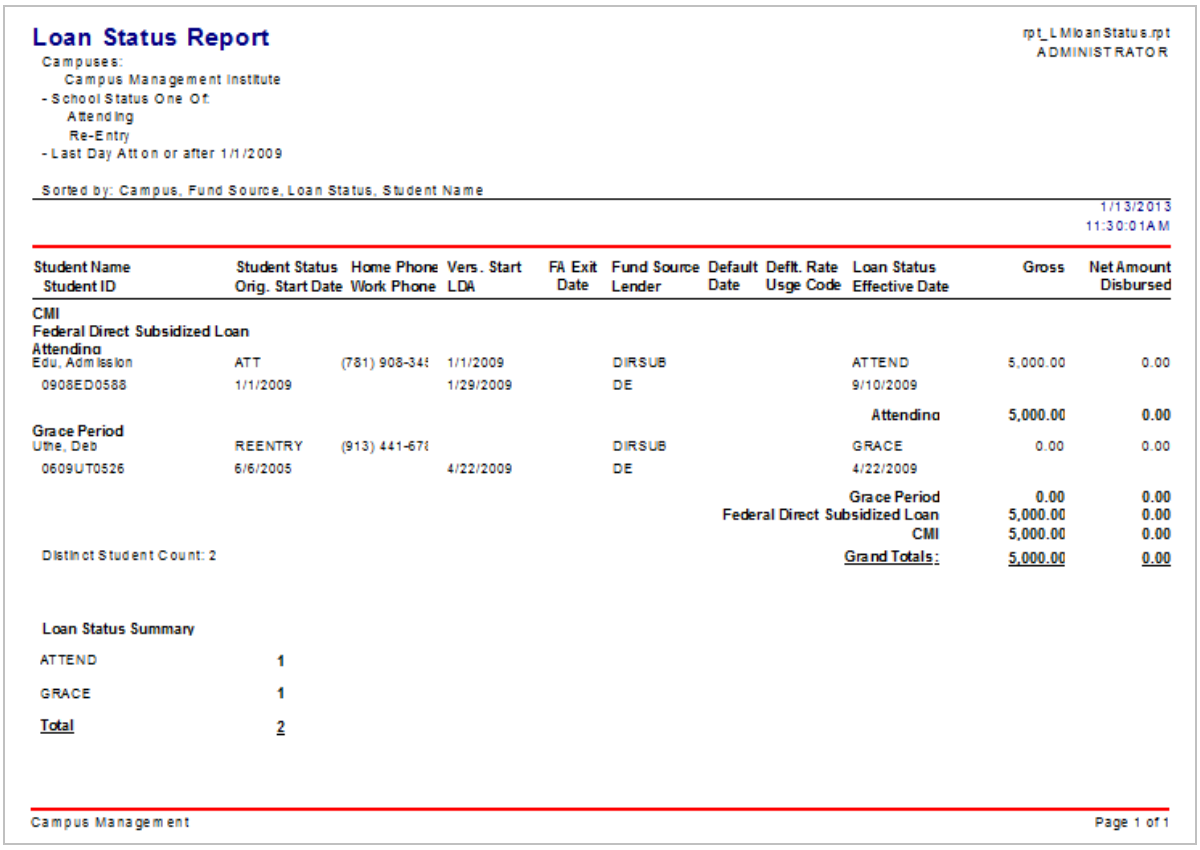
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Student ID
   - Student Status
   - Original Start Date
   - Home Phone
   - Work Phone

- Program Version Start Date
- Last Date of Attendance (LDA)
- FA Exit Date
- Fund Source
- Lender
- Default Date
- Default Rate Usage Code
- Loan Status
- Effective Loan Status Date
- Loan Gross
- Loan Net Amount Disbursed

Grand totals are provided for the student count, gross, net. There is a summary count of students in each Loan Status and student in default.



Loan Status Report

rpt_LMloanStatus.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- School Status One Of:
Attending
Re-Entry
- Last Day Att on or after 1/1/2009

Sorted by: Campus, Fund Source, Loan Status, Student Name

1/13/2013
11:30:01AM

Student Name / Student ID	Student Status / Orig. Start Date	Home Phone / Work Phone	Vers. Start / LDA	FA Exit Date	Fund Source / Lender	Default Date	Deflt. Rate Usge Code	Loan Status / Effective Date	Gross	Net Amount Disbursed
CMI										
Federal Direct Subsidized Loan										
Attending										
Edu, Admission	ATT	(781) 908-345	1/1/2009		DIRSUB			ATTEND	5,000.00	0.00
0908ED0588	1/1/2009		1/29/2009		DE			9/10/2009		
								Attending	5,000.00	0.00
Grace Period										
Uthe, Deb	REENTRY	(913) 441-678			DIRSUB			GRACE	0.00	0.00
0609UT0526	6/6/2005		4/22/2009		DE			4/22/2009		
								Grace Period	0.00	0.00
								Federal Direct Subsidized Loan	5,000.00	0.00
								CMI	5,000.00	0.00
Distinct Student Count: 2								Grand Totals:	5,000.00	0.00

Loan Status Summary

ATTEND	1
GRACE	1
Total	2

Campus Management
Page 1 of 1

Student Services Reports

Navigate to **Reports > Student Services Reports** to access the following Student Services reports:

- Athletics Eligibility in Years Report
- Athletics Equity Report
- Athletics Financial Aid Report
- Disability Services Report
- Housing Assistance Report
- Veteran Information Report

Note: The System Administrator must set up security rights to view, print, or export reports. Staff members and staff groups must be given security rights to view, print, and/or export reports. This does not apply to custom reports.

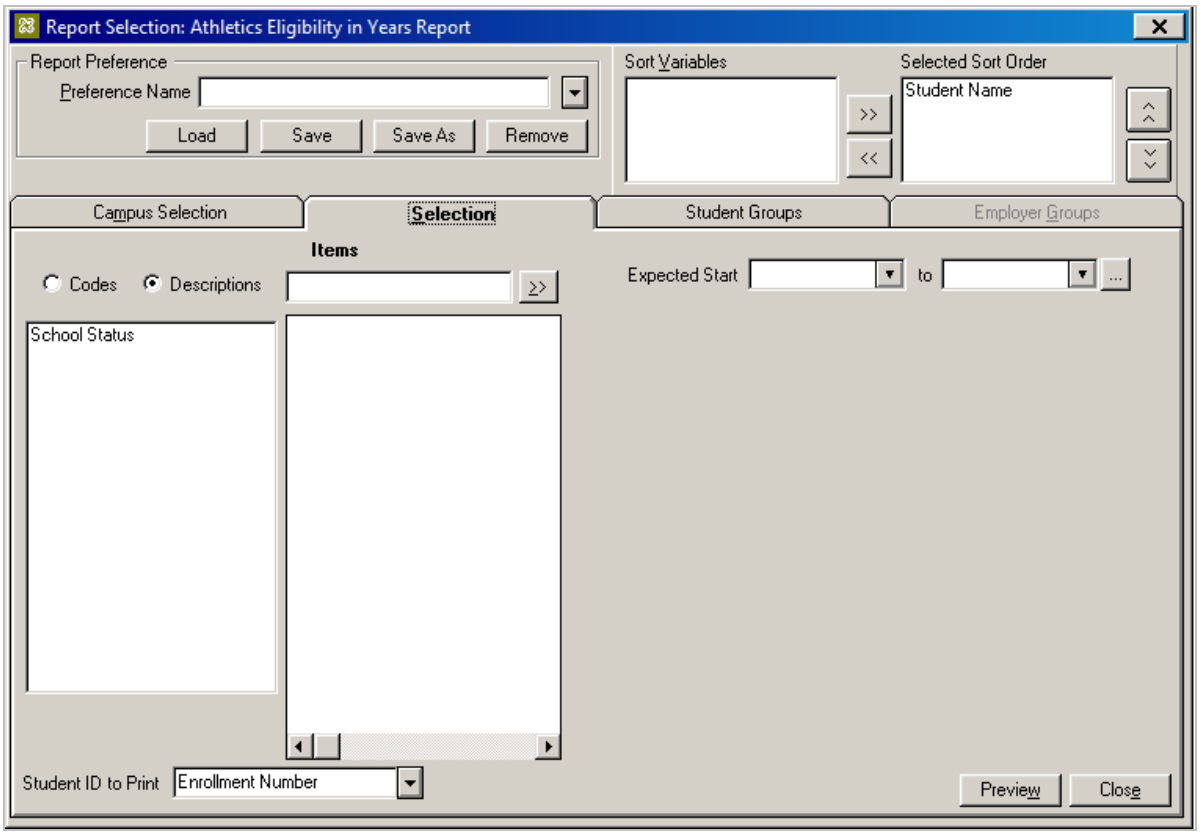
Athletics Eligibility in Years Report

This report lists each student's remaining athletic eligibility in years by start date, as well as those who have exhausted their athletic eligibility. The report allows Athletic Administrators to identify the following regarding a cohort of student athletes:

a. Time to graduation
b. Students who dropped or terminated before receiving their degrees who would have been eligible to compete in the next regular academic term
c. Remaining eligibility in years

To run the report:

1. Navigate to **Reports > Student Services > Athletics Eligibility in Years Report**. The Report Selection: Athletics Eligibility in Years Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

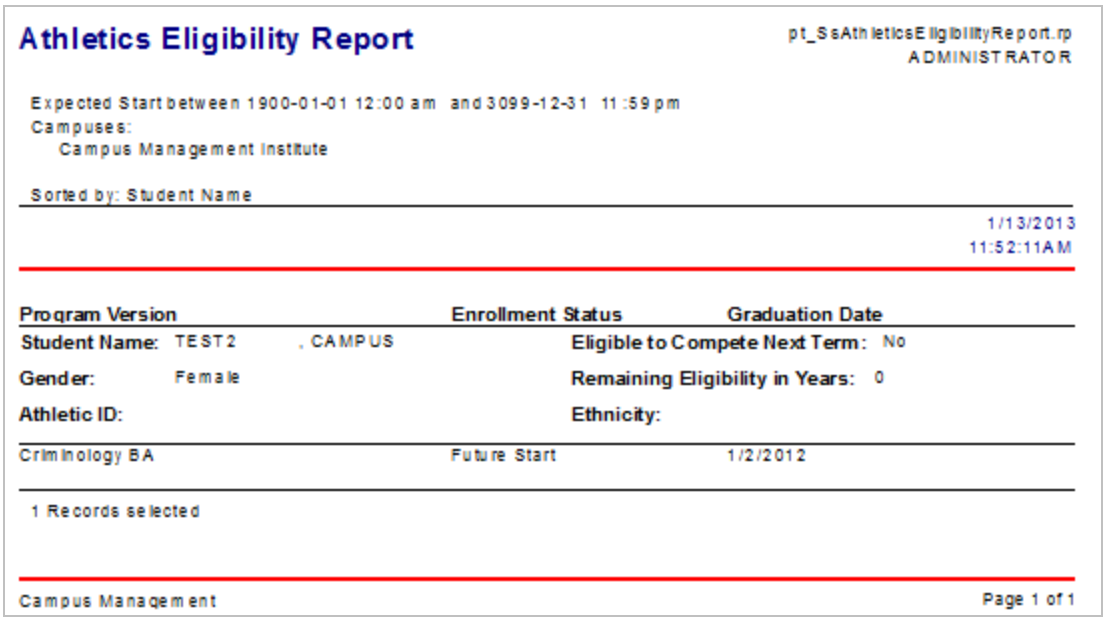


4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

- Program Version
- Enrollment Status
- Graduation Date
- Student Name
- Gender
- Athletic ID
- Eligible to Compete Next Term (Yes/No)
- Remaining Eligibility in Years
- Ethnicity



Athletics Eligibility Report

pt_SsAthleticsEligibilityReport.rp
ADMINISTRATOR

Expected Start between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Campuses:
Campus Management Institute

Sorted by: Student Name

1/13/2013
11:52:11AM

Program Version	Enrollment Status	Graduation Date
Student Name: TEST2 , CAMPUS	**Eligible to Compete Next Term:** No	
Gender: Female	**Remaining Eligibility in Years:** 0	
Athletic ID:	**Ethnicity:**	
Criminology BA	Future Start	1/2/2012

1 Records selected

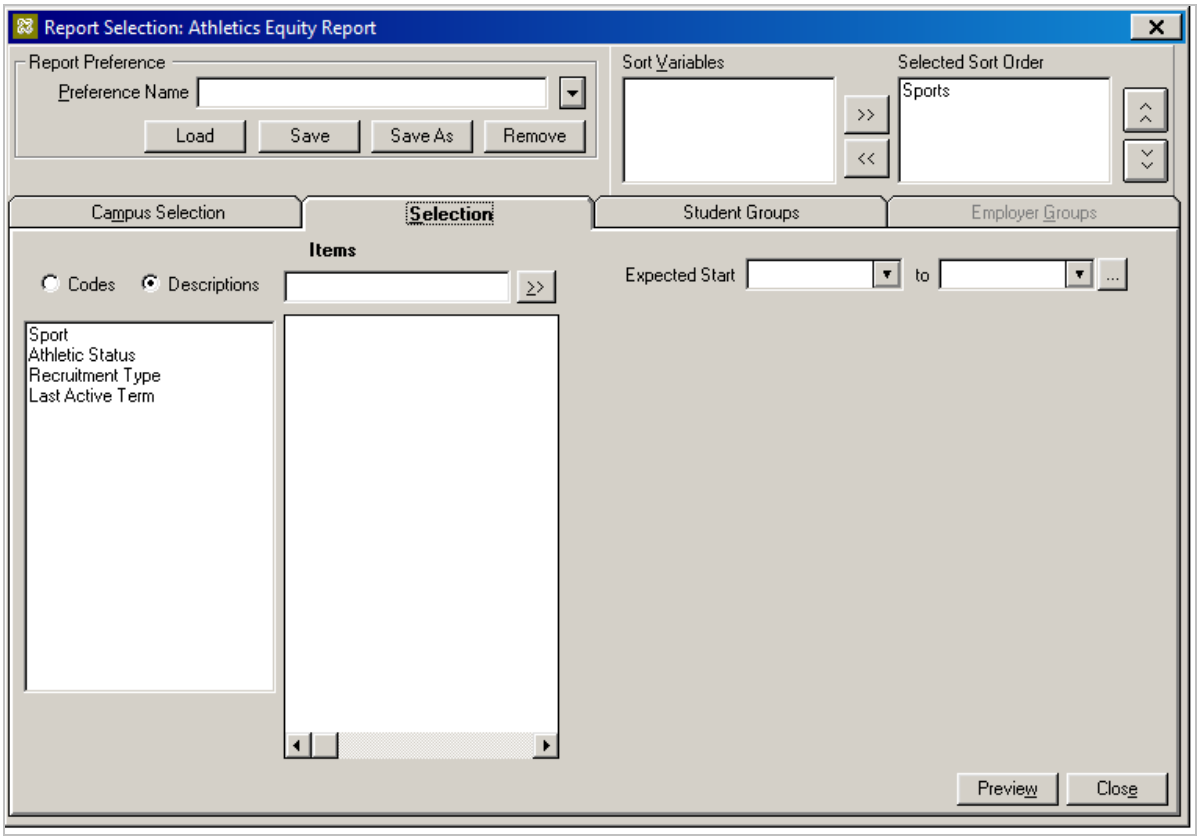
Campus Management Page 1 of 1

Athletics Equity Report

This report lists the number of male and female athletes in each sport which is a part of the institution's athletic association.

To run the report:

1. Navigate to **Reports > Student Services > Athletics Equity Report**. The Report Selection: Athletics Equity Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

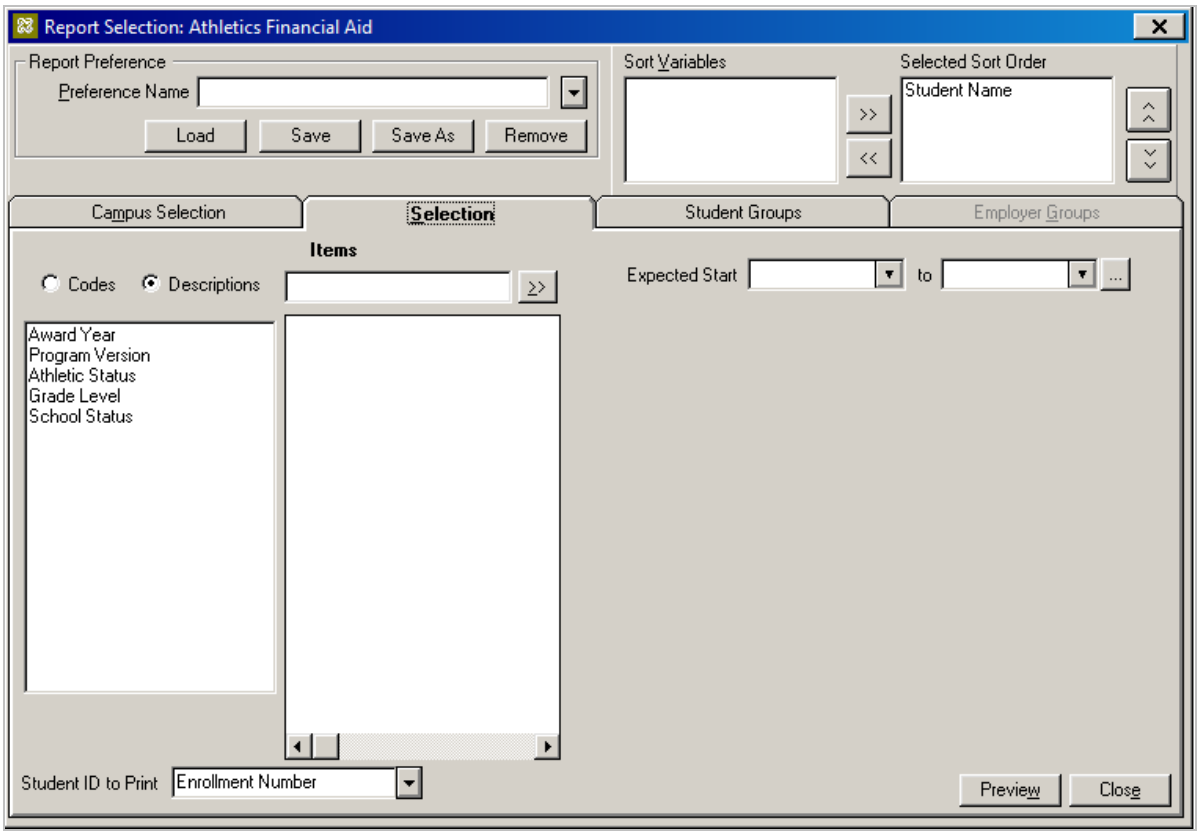
   The report displays all sports in which students participated and the number of male and female athletes participating in each sport.

Athletics Financial Aid

This report provides financial aid information required by an athletic association such as the NCAA. The report identifies special types of fund sources related to athletics.

To run the report:

1. Navigate to **Reports > Student Services > Athletics Financial Aid**. The Report Selection: Athletics Financial Aid form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

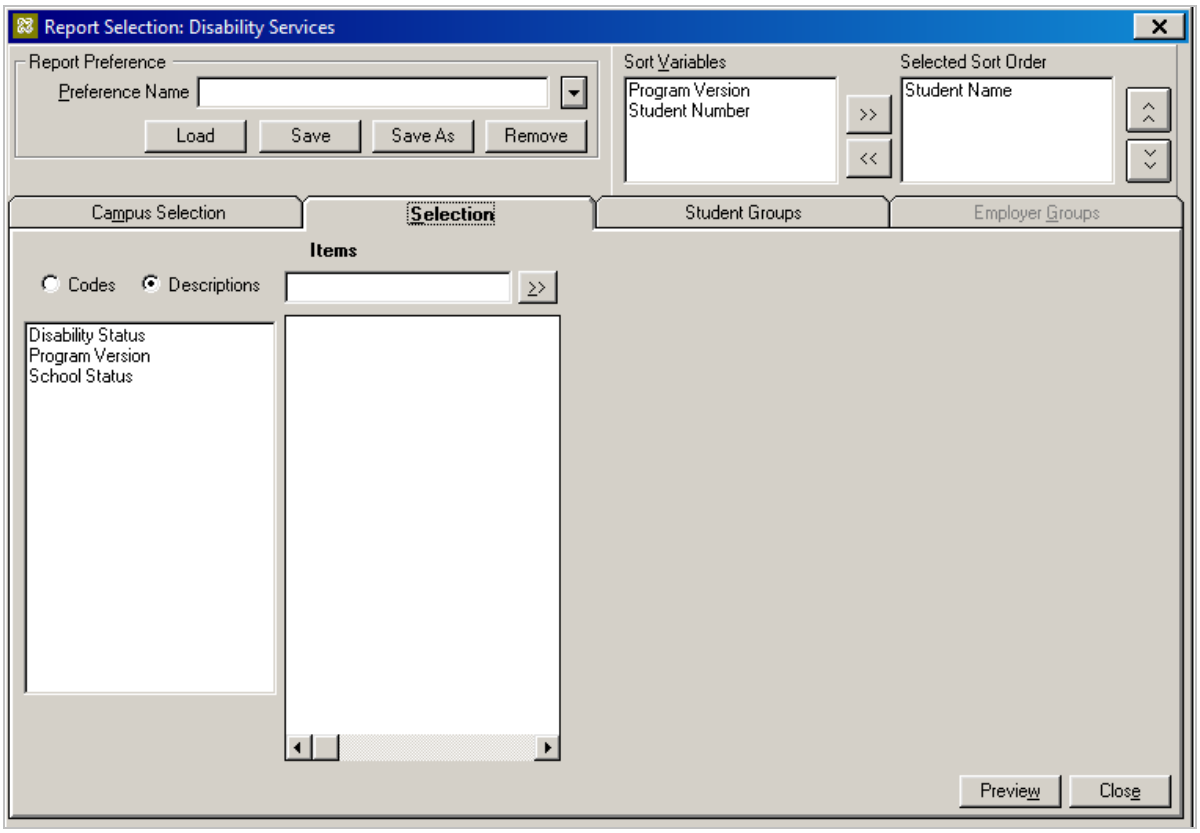
   Note: If you filter data by Student Groups, the Selection tab filters do not apply.
5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

Disability Services

This report lists the number of undergraduate students currently registered and/or confirmed with the Office of Disability Services. The report is used by institutions that need to complete the IPEDS Institutional Characteristics report for their campus.

To run the report:

1. Navigate to **Reports > Student Services > Disability Services**. The Report Selection: Disability Services form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

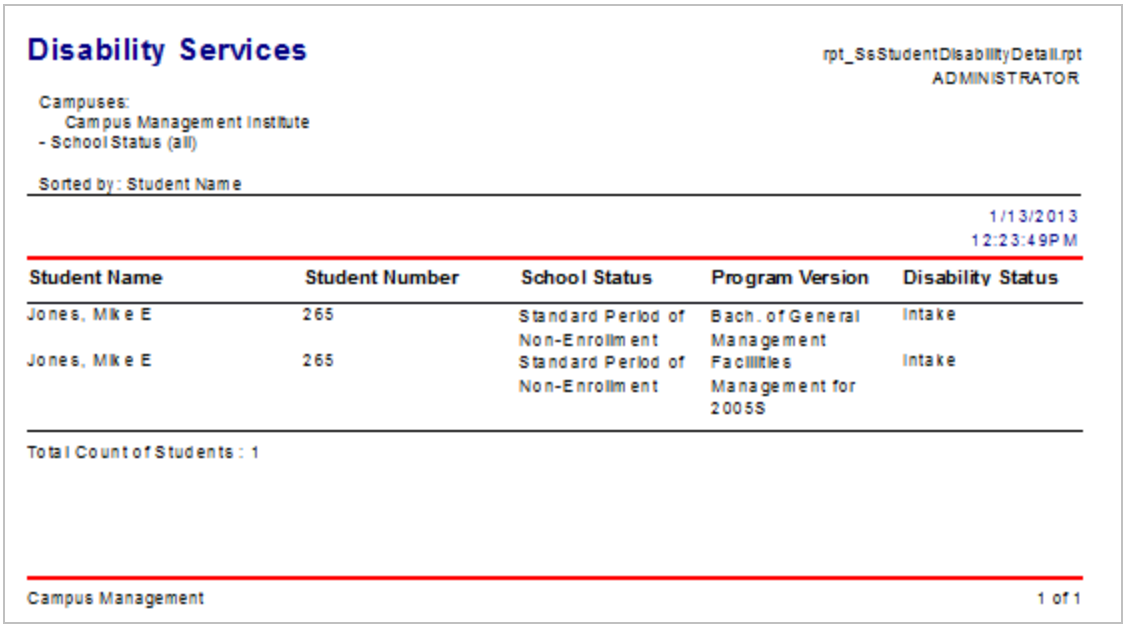
   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - Student Number
   - School Status
   - Program Version

- Disability Status



Disability Services

rpt_SsStudentDisabilityDetail.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- School Status (all)

Sorted by : Student Name

1/13/2013
12:23:49PM

Student Name	Student Number	School Status	Program Version	Disability Status
Jones, Mike E	265	Standard Period of Non-Enrollment	Bach. of General Management	Intake
Jones, Mike E	265	Standard Period of Non-Enrollment	Facilities Management for 2005S	Intake

Total Count of Students : 1

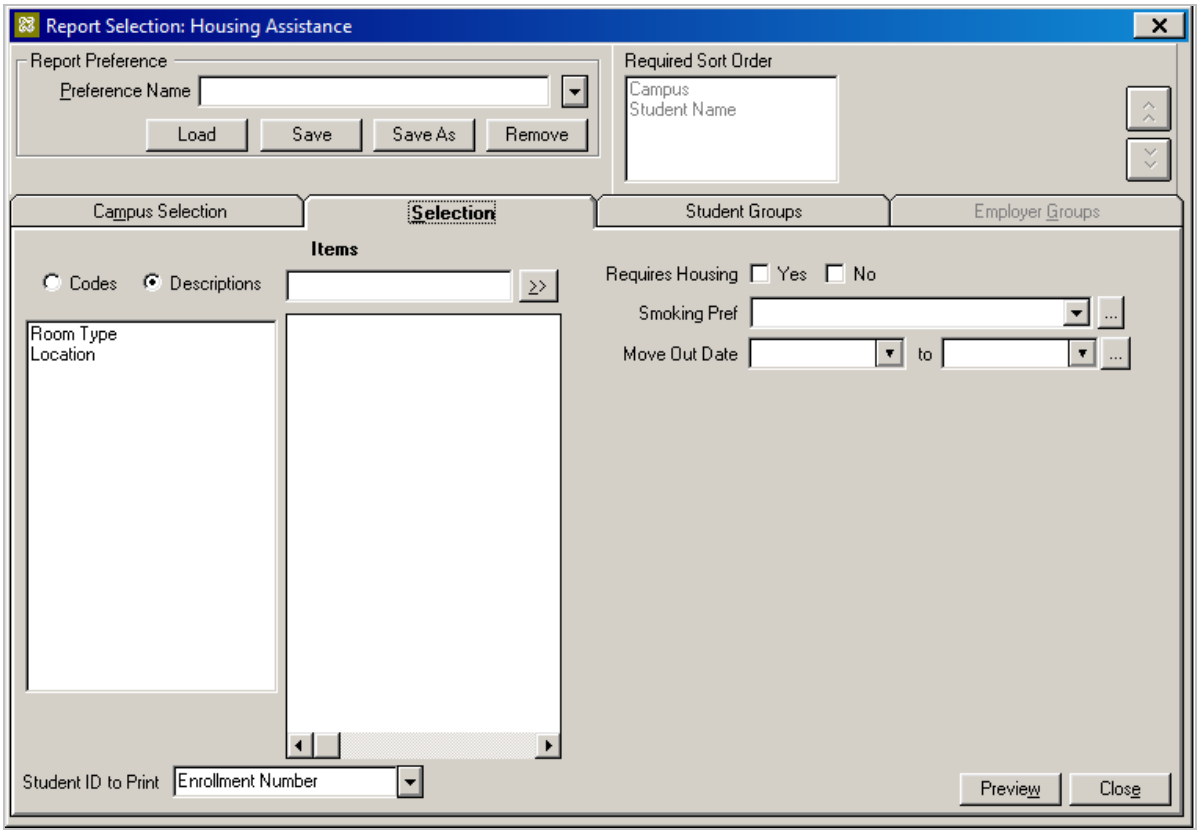
Campus Management 1 of 1

Housing Assistance

This report is used to display housing information, including students requesting housing assistance.

To run the report:

1. Navigate to **Reports > Student Services > Housing Assistance**. The Report Selection: Housing Assistance form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

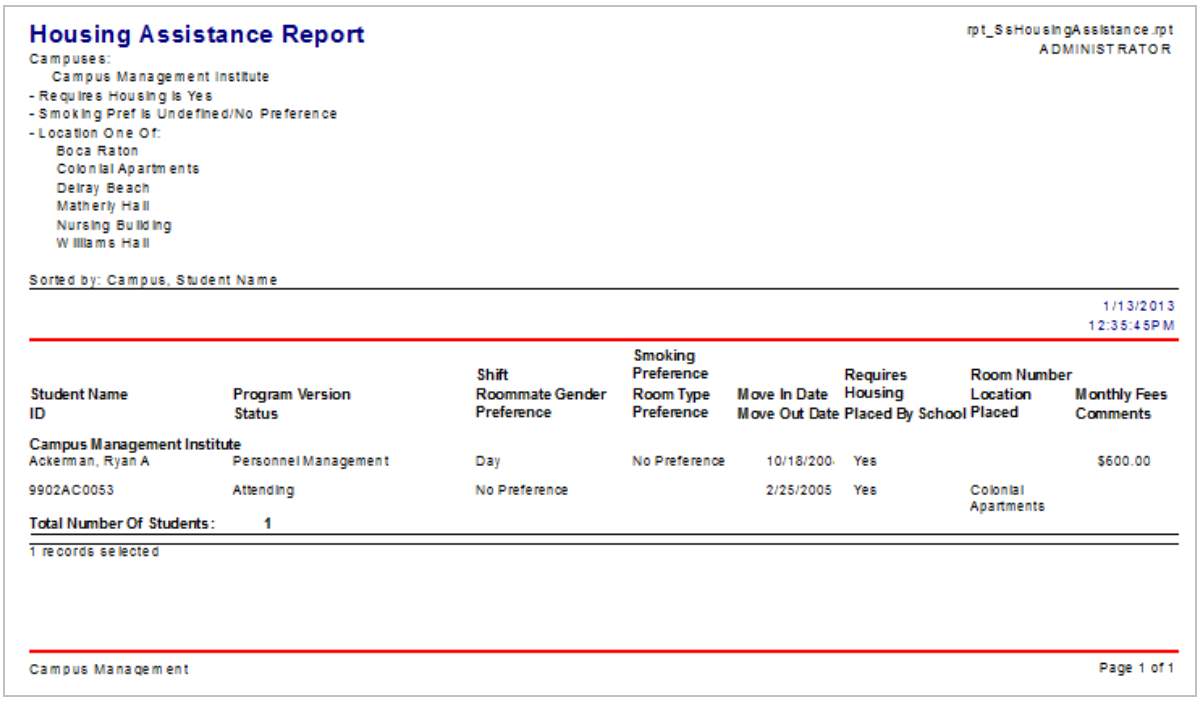
   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name and ID
   - Program Version
   - Status
   - Shift
   - Roommate Gender Preference
   - Smoking Preference

- Room Type Preference
- Move In Date
- Move Out Date
- Housing Required (Yes/No)
- Placed by School
- Room Number
- Location Placed
- Monthly Fees
- Comments



Housing Assistance Report

rpt_SsHousingAssistance.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- Requires Housing Is Yes
- Smoking Pref Is Undefined/No Preference
- Location One Of:
Boca Raton
Colonial Apartments
Delray Beach
Matherly Hall
Nursing Building
Williams Hall

Sorted by: Campus, Student Name

1/13/2013
12:35:45PM

Student Name / ID	Program Version / Status	Shift / Roommate Gender Preference	Smoking Preference / Room Type Preference	Move In Date / Move Out Date	Requires Housing / Placed By School	Room Number / Location Placed	Monthly Fees / Comments
Campus Management Institute							
Ackerman, Ryan A	Personnel Management	Day	No Preference	10/18/200	Yes		$600.00
9902AC0053	Attending	No Preference		2/25/2005	Yes	Colonial Apartments	
Total Number Of Students:	**1**						

1 records selected

Campus Management

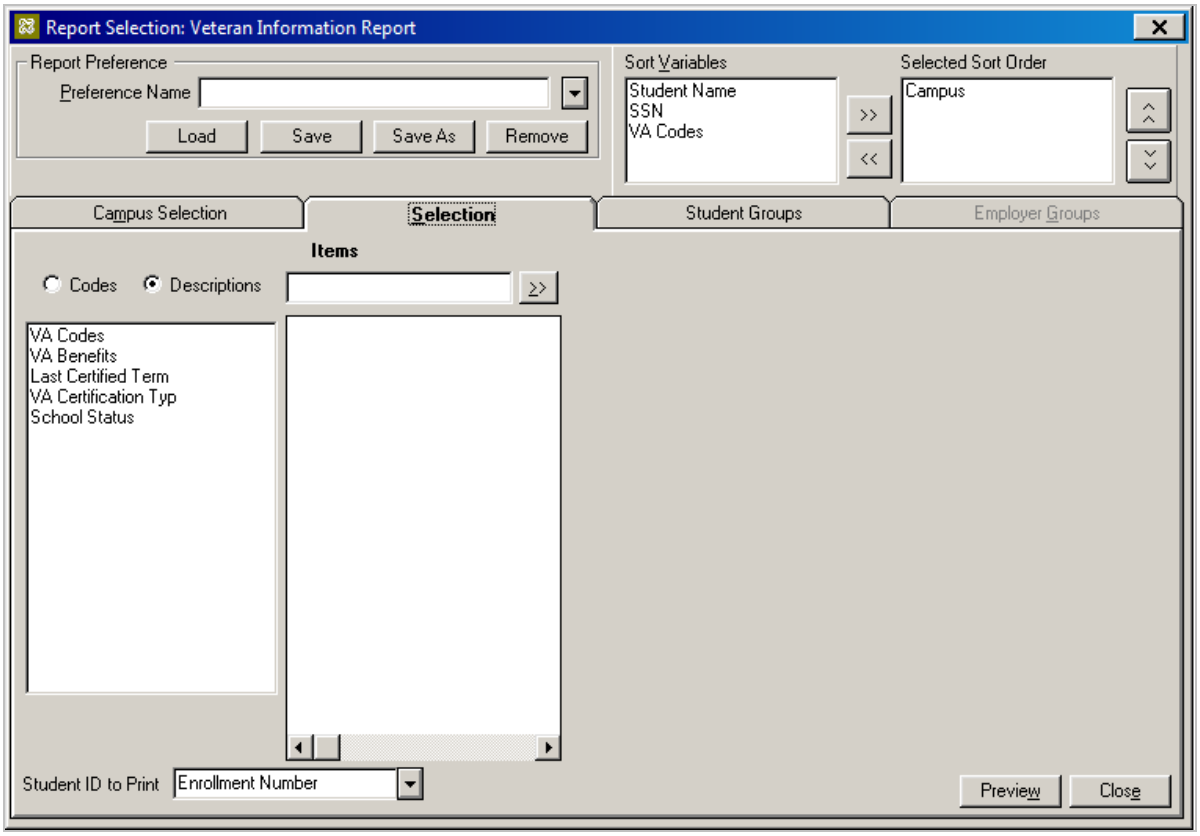
Page 1 of 1

Veteran Information Report

This report is used by Veterans Affairs (VA) Advisors to review information regarding VA students.

To run the report:

1. Navigate to **Reports > Student Services > Veteran Information Report**. The Report Selection: Veteran Information Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



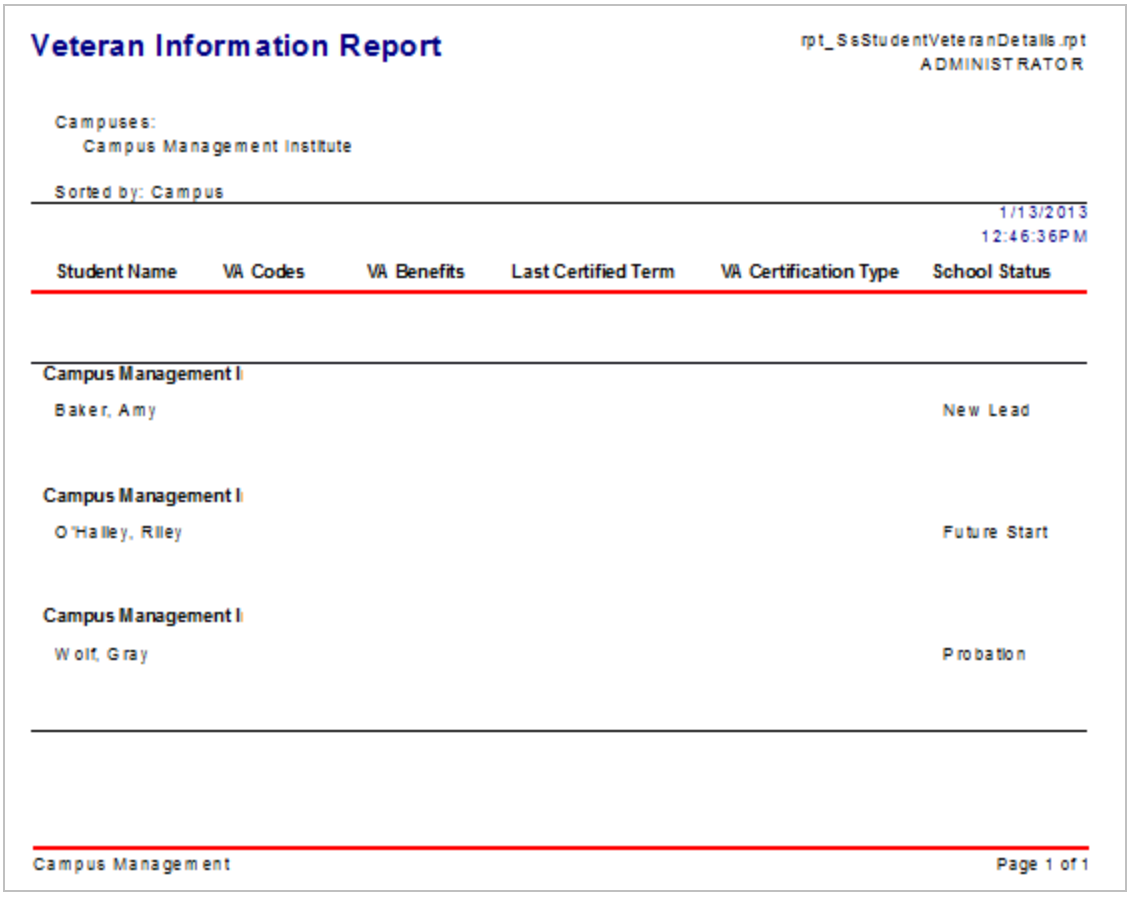
4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name
   - VA Codes
   - VA Benefits
   - Last Certified Term
   - VA Certification Type
   - School Status



Veteran Information Report

rpt_SsStudentVeteranDetails.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute

Sorted by: Campus

1/13/2013
12:46:36PM

Student Name	VA Codes	VA Benefits	Last Certified Term	VA Certification Type	School Status
Campus Management I					
Baker, Amy					New Lead
Campus Management I					
O'Halley, Riley					Future Start
Campus Management I					
Wolf, Gray					Probation

Campus Management

Page 1 of 1

From the Report Viewer, you can save student groups and export the data to Excel.

Note: Since VA Advisors can report on VA students by current and previous certified terms, a best practice is to run the Veteran Information Report and save the output as a student group at the end of each term. For more information see Student Groups. Another best practice is to add a new VA record every term the student is certified.

Housing Reports

Navigate to **Reports > Housing** to access the following Housing reports:

- Academic Year Dates Comparison
- Available Housing
- Current Occupants By Room Type
- Housing Exception Report
- Housing Population Percentage
- Housing Requirement Progress
- Housing Start Rates
- New Student Occupants
- Occupancy Count
- Occupants By Lease and Graduation Dates
- Overbooked Rooms
- Persistence Report
- Student Move Out Details
- Students Requiring Housing Assignment

Note: The System Administrator must set up security rights to view, print, or export reports. Staff members and staff groups must be given security rights to view, print, and/or export reports. This does not apply to custom reports.

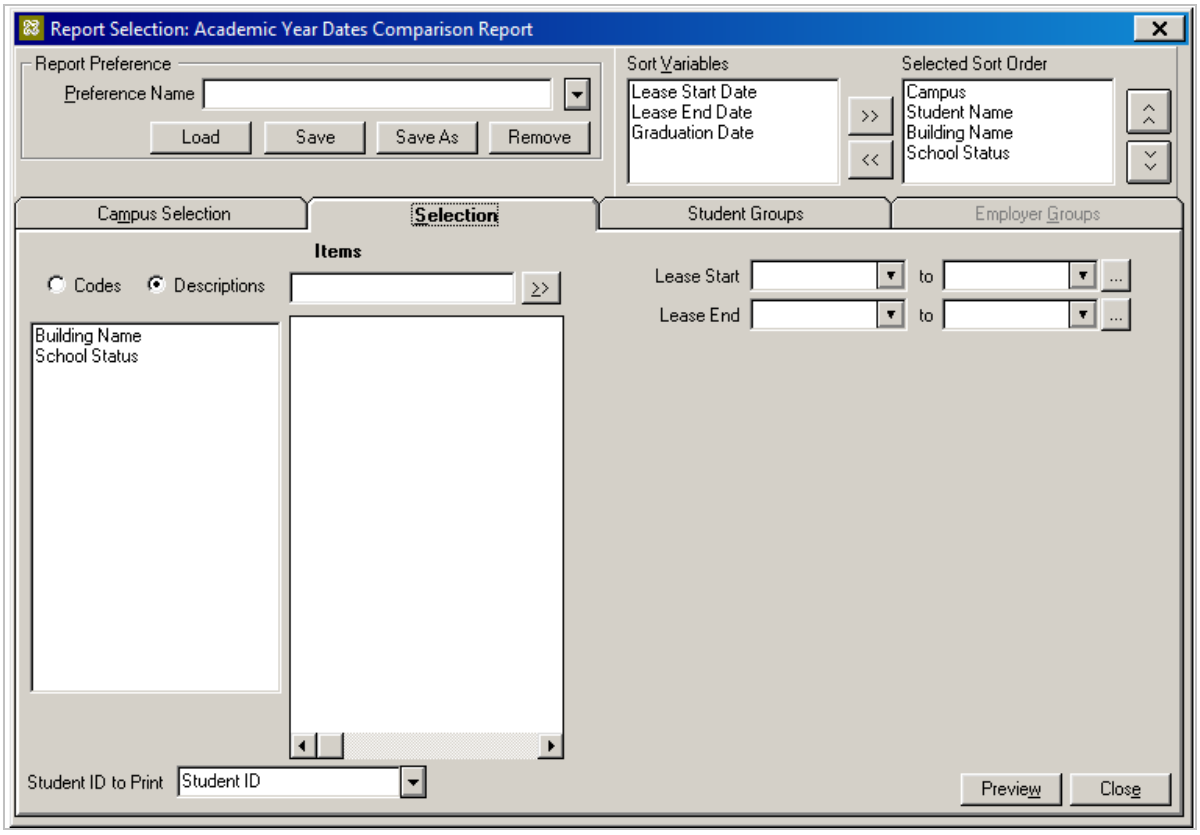
Academic Year Dates Comparison Report

This report lists students who have discrepancies between their Lease Academic Year dates and the Academic Year dates in financial aid.

Note: The report does not list students whose housing period is term or housing date.

To run the report:

1. Navigate to **Reports > Housing > Academic Year Dates Comparison Report**. The Report Selection: Academic Year Dates Comparison Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   For each student identified with a discrepancy, the report lists the following details:

   - Student Name
   - Student ID
   - School Status
   - Building Name

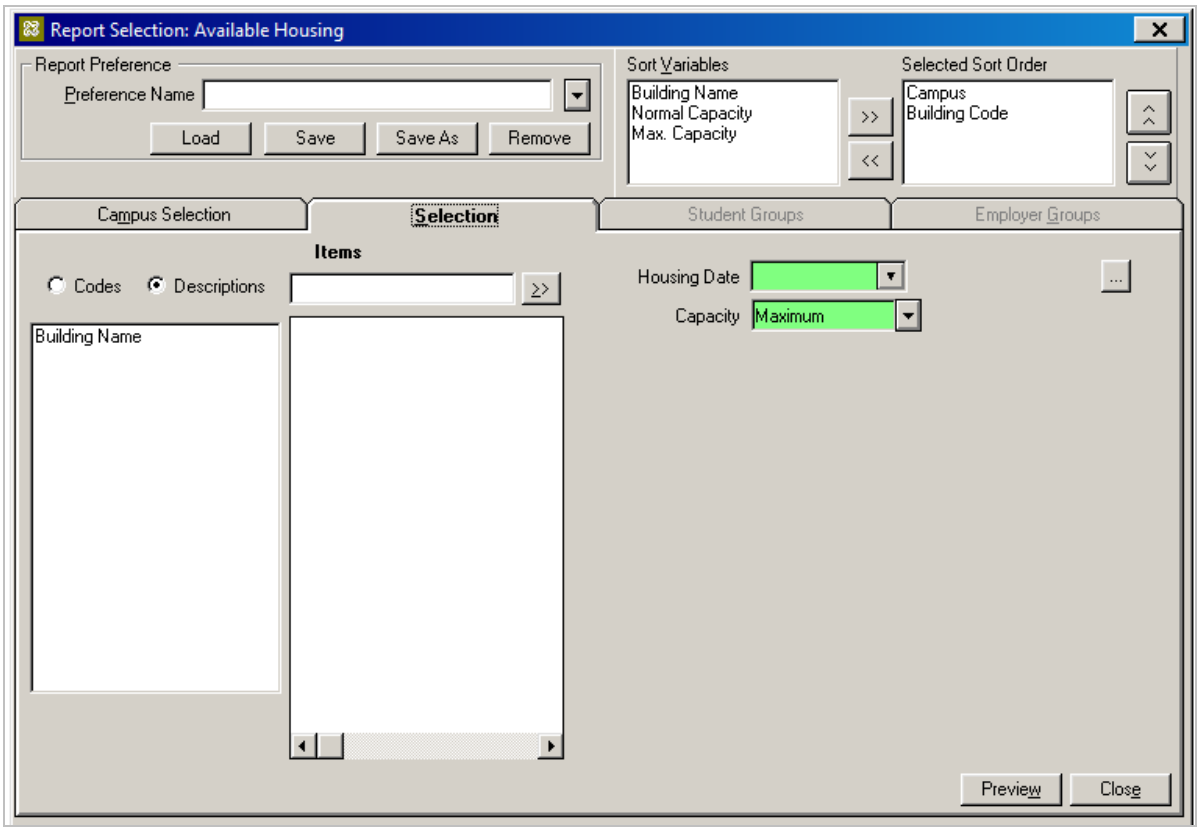
- Room Number
- Suite Number
- Lease Dates
- Academic Year Date(s)

Available Housing

This report lists the number of available rooms (of specific capacity) in selected campus building(s) on a particular date. The report displays only those rooms where the selected date falls between the lease start date and end date.

To run the report:

1. Navigate to **Reports > Housing > Available Housing**. The Report Selection: Available Housing form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

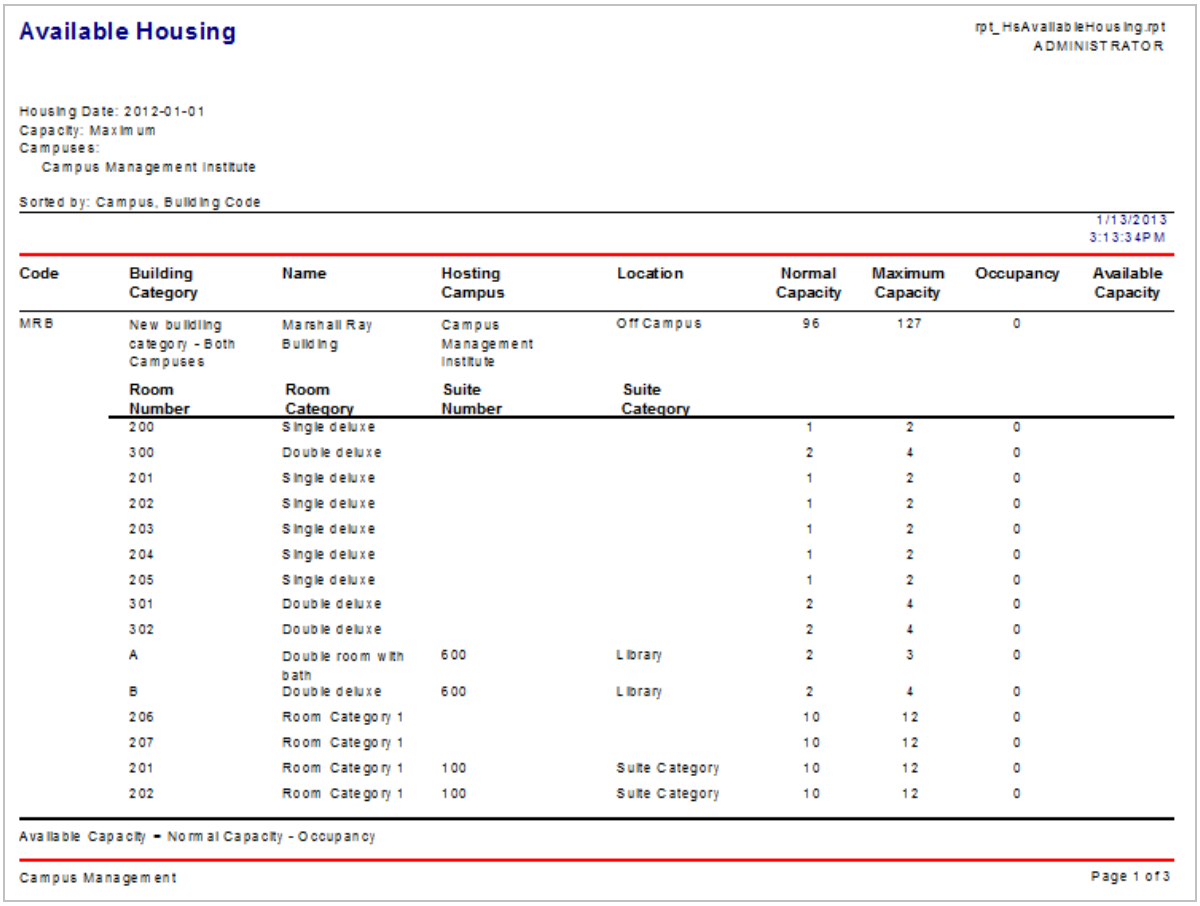


4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Code
   - Building Category
   - Name
   - Hosting Campus
   - Location
   - Normal Capacity
   - Maximum Capacity
   - Occupancy

- Available Capacity (= normal capacity minus occupancy)



Available Housing

rpt_HsAvailableHousing.rpt
ADMINISTRATOR

Housing Date: 2012-01-01
Capacity: Maximum
Campuses:
Campus Management Institute

Sorted by: Campus, Building Code

1/13/2013
3:13:34PM

Code	Building Category	Name	Hosting Campus	Location	Normal Capacity	Maximum Capacity	Occupancy	Available Capacity
MRB	New building category - Both Campuses	Marshall Ray Building	Campus Management Institute	Off Campus	96	127	0	

Room Number	Room Category	Suite Number	Suite Category				
200	Single deluxe			1	2	0	
300	Double deluxe			2	4	0	
201	Single deluxe			1	2	0	
202	Single deluxe			1	2	0	
203	Single deluxe			1	2	0	
204	Single deluxe			1	2	0	
205	Single deluxe			1	2	0	
301	Double deluxe			2	4	0	
302	Double deluxe			2	4	0	
A	Double room with bath	600	Library	2	3	0	
B	Double deluxe	600	Library	2	4	0	
206	Room Category 1			10	12	0	
207	Room Category 1			10	12	0	
201	Room Category 1	100	Suite Category	10	12	0	
202	Room Category 1	100	Suite Category	10	12	0	

Available Capacity = Normal Capacity - Occupancy

Campus Management

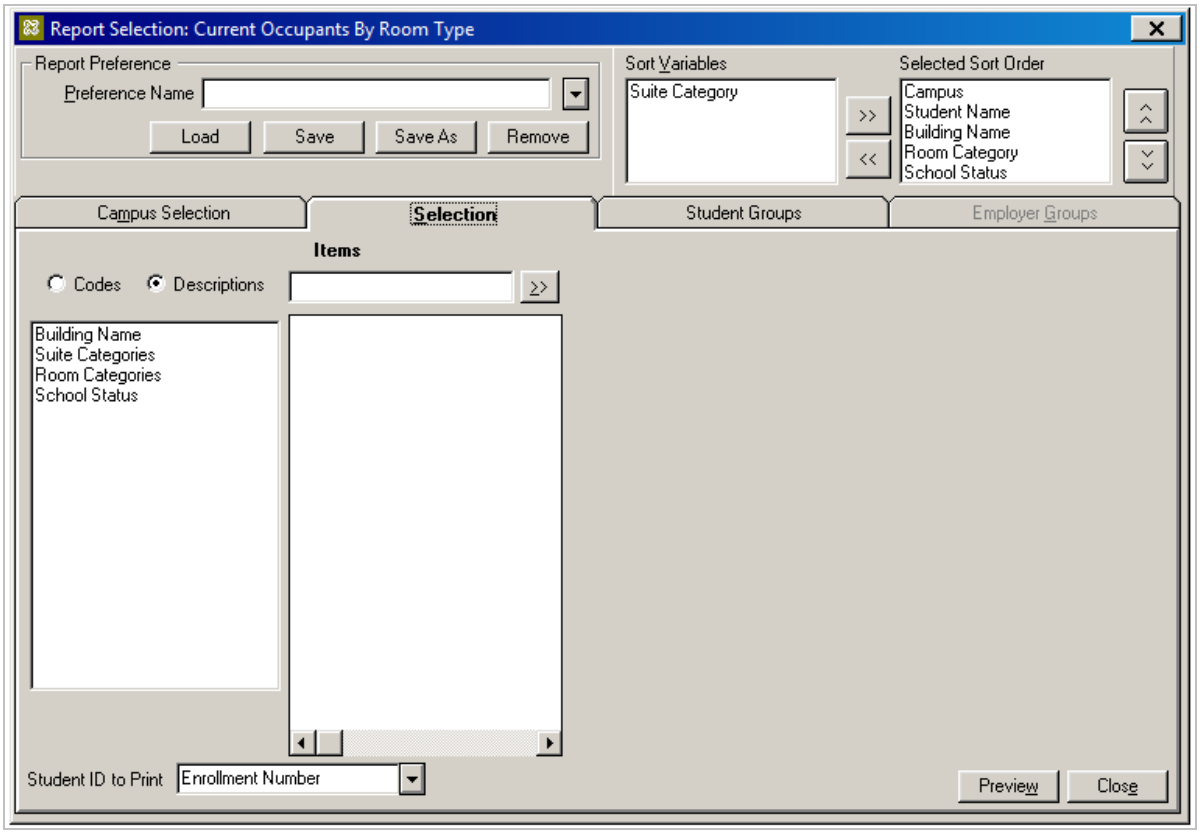
Page 1 of 3

Current Occupants By Room Type

This report lists the current occupants in a campus building for a particular room type.

To run the report:

1. Navigate to **Reports > Housing > Current Occupants By Room Type**. The Report Selection: Current Occupants By Room Type form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

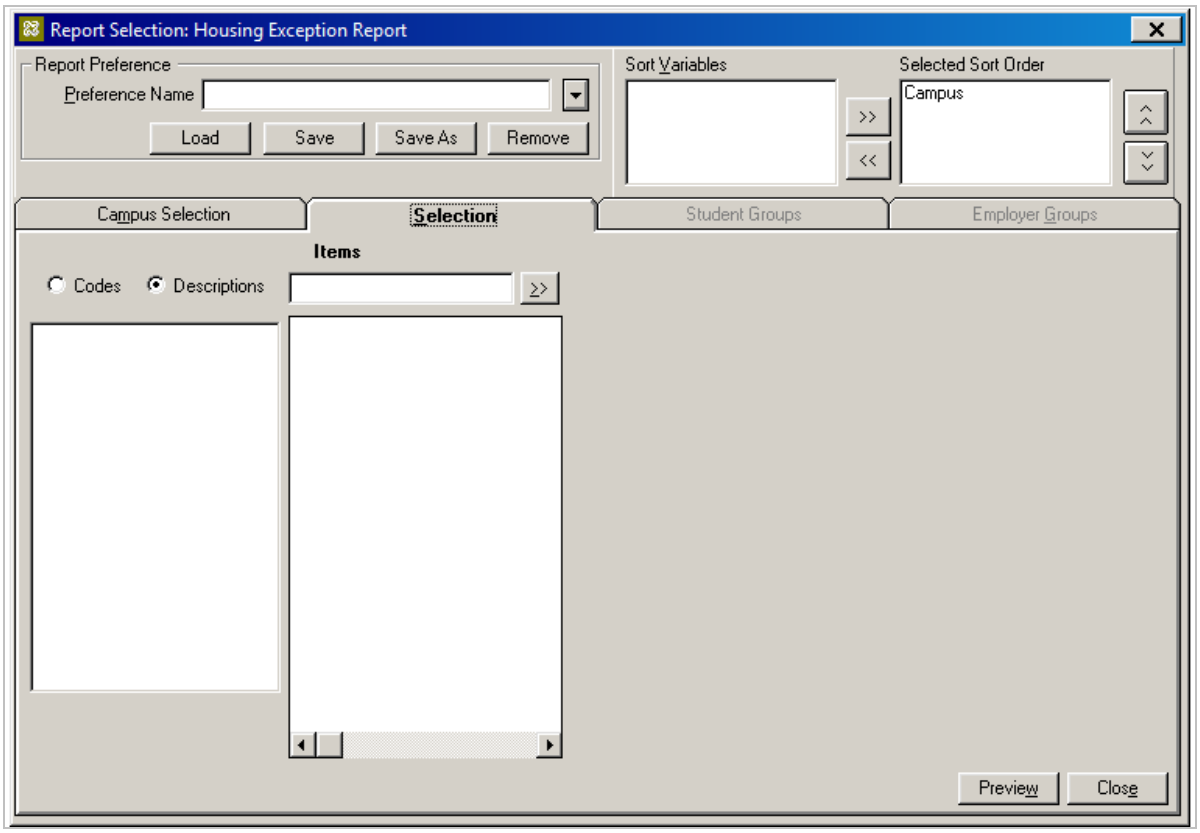
   - Student Name and ID
   - School Status
   - Building Name
   - Room Number and Category
   - Suite Number and Category

Housing Exception Report

This report displays students whose lease status has been set to "Pending". This status is set if a room conflict occurred when a lease was extended resulting in a conflict with another student who was to move into that room.

To run the report:

1. Navigate to **Reports > Housing > Housing Exception Report**. The Report Selection: Housing Exception Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

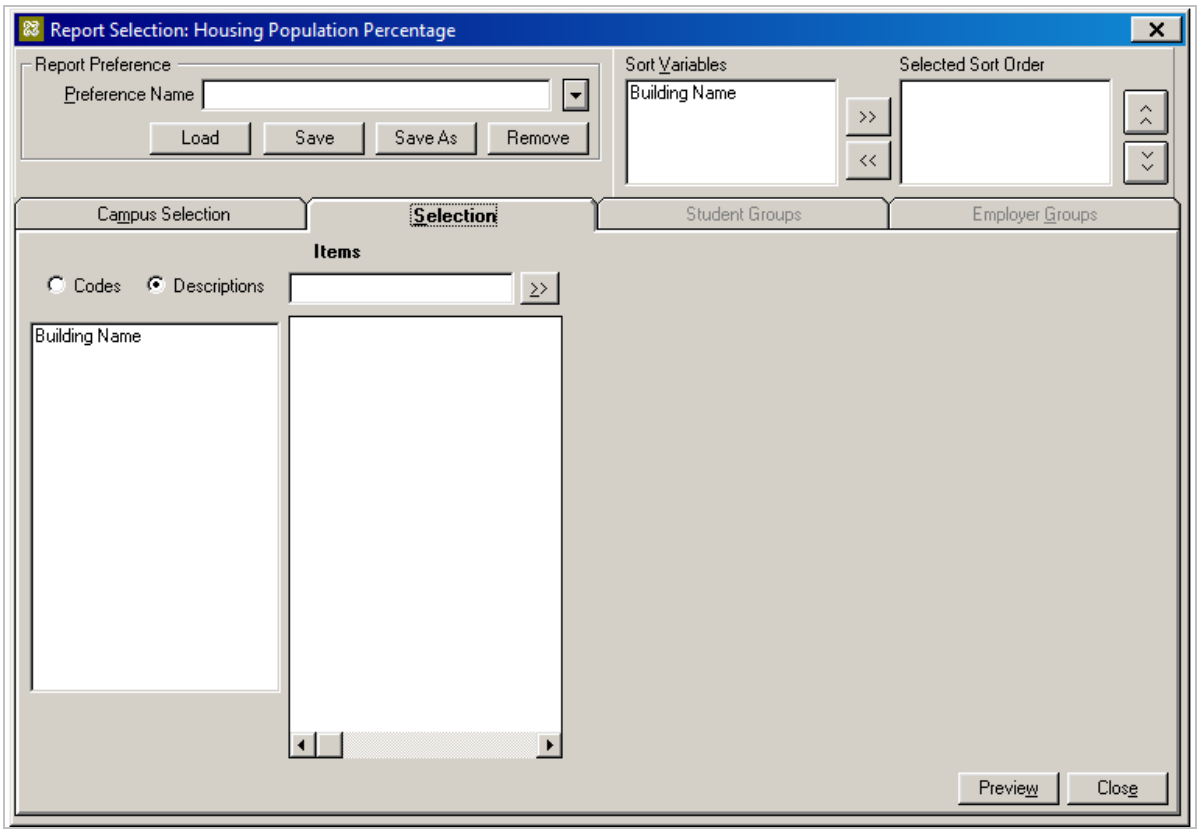
   - Student Name
   - Room
   - Sequence Number
   - Lease Start and End Date
   - Lease Status
   - Reason for the exception

Housing Population Percentage

This report displays the detailed summary of student occupancy in selected campus buildings within a specific time period (specified housing start and end dates). The report also displays the total number of active students in the selected campus.

To run the report:

1. Navigate to **Reports > Housing > Housing Population Percentage**. The Report Selection: Housing Population Percentage form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

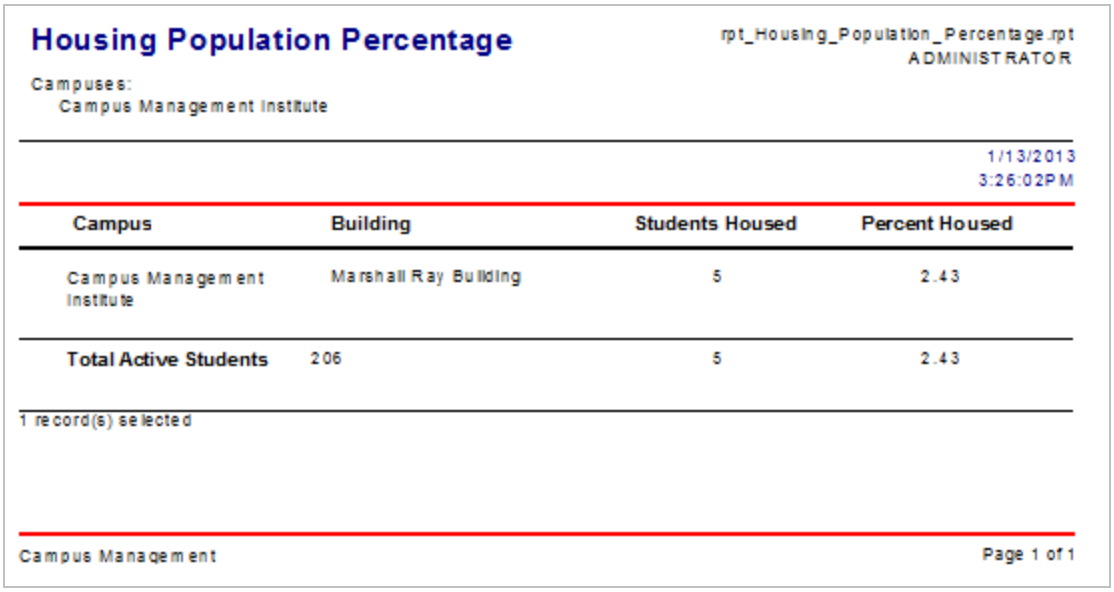


4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Campus
   - Building
   - Number of Students Housed

- Percentage of Students Housed



Housing Population Percentage

rpt_Housing_Population_Percentage.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute

1/13/2013
3:26:02PM

Campus	Building	Students Housed	Percent Housed
Campus Management Institute	Marshall Ray Building	5	2.43
Total Active Students	206	5	2.43

1 record(s) selected

Campus Management

Page 1 of 1

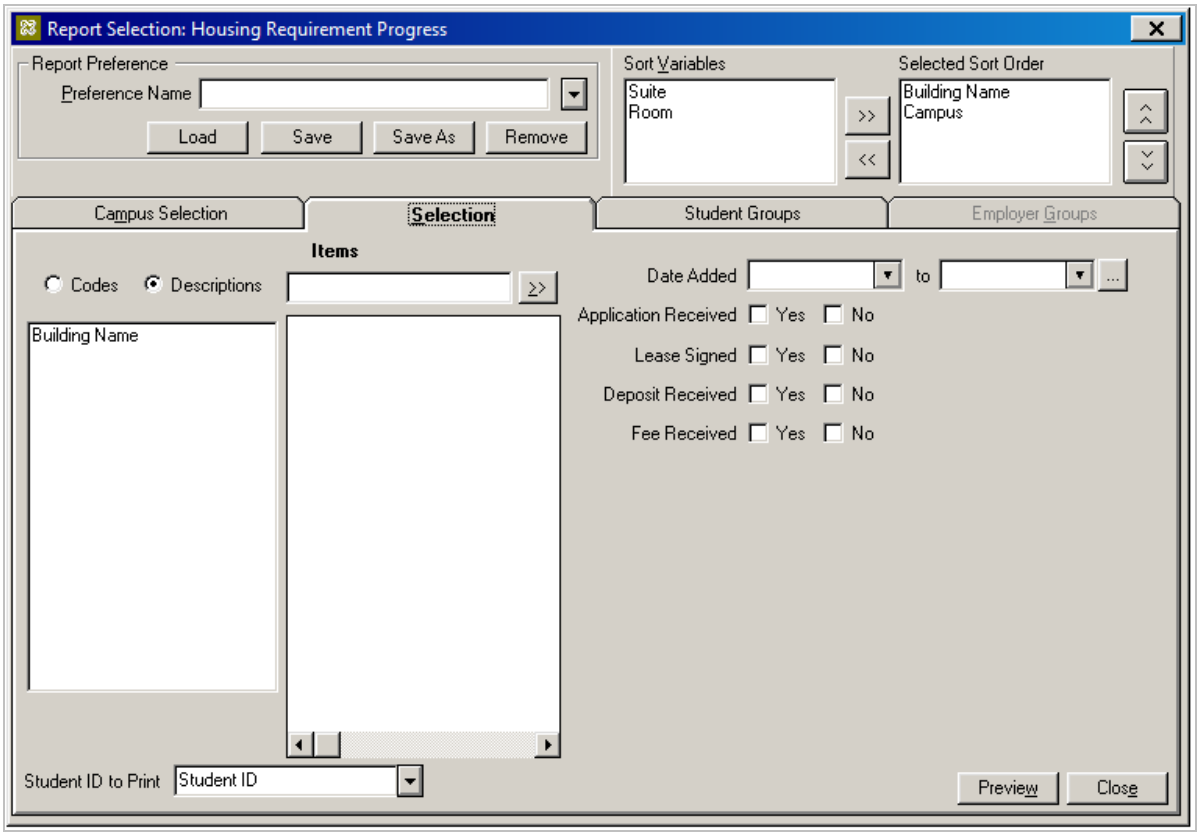
Housing Requirement Progress

This report summarizes the details of the applicants, the status of their fee and rent deposits, and the lease agreement in a specific time period.

To run the report:

1. Navigate to **Reports > Housing > Housing Requirement Progress**. The Report Selection: Housing Requirement Progress form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

   Note: The 'Date Added' is the time period (from and to dates) in which the housing application progress is tracked.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

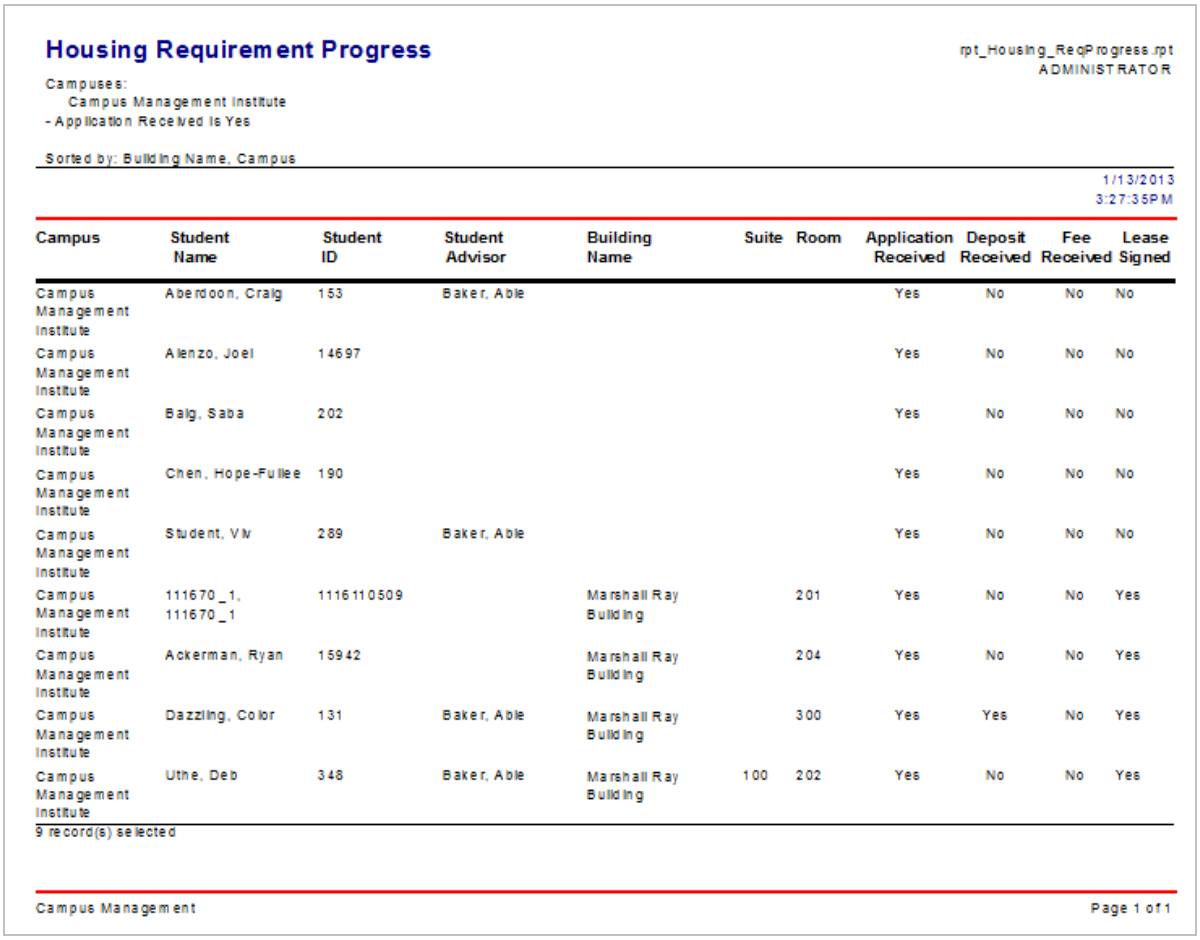
   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Campus
   - Student Name and ID
   - Student Advisor
   - Building Name

- Suite
- Room
- Application, Deposit, and Fee Received (Yes/No)
- Lease Signed (Yes/No)



Housing Requirement Progress

rpt_Housing_ReqProgress.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- Application Received Is Yes

Sorted by: Building Name, Campus

1/13/2013
3:27:35PM

Campus	Student Name	Student ID	Student Advisor	Building Name	Suite	Room	Application Received	Deposit Received	Fee Received	Lease Signed
Campus Management Institute	Aberdoon, Craig	153	Baker, Able				Yes	No	No	No
Campus Management Institute	Alenzo, Joel	14697					Yes	No	No	No
Campus Management Institute	Baig, Saba	202					Yes	No	No	No
Campus Management Institute	Chen, Hope-Fullee	190					Yes	No	No	No
Campus Management Institute	Student, Vlv	289	Baker, Able				Yes	No	No	No
Campus Management Institute	111670_1, 111670_1	1116110509		Marshall Ray Building		201	Yes	No	No	Yes
Campus Management Institute	Ackerman, Ryan	15942		Marshall Ray Building		204	Yes	No	No	Yes
Campus Management Institute	Dazzling, Color	131	Baker, Able	Marshall Ray Building		300	Yes	Yes	No	Yes
Campus Management Institute	Uthe, Deb	348	Baker, Able	Marshall Ray Building	100	202	Yes	No	No	Yes

9 record(s) selected

Campus Management

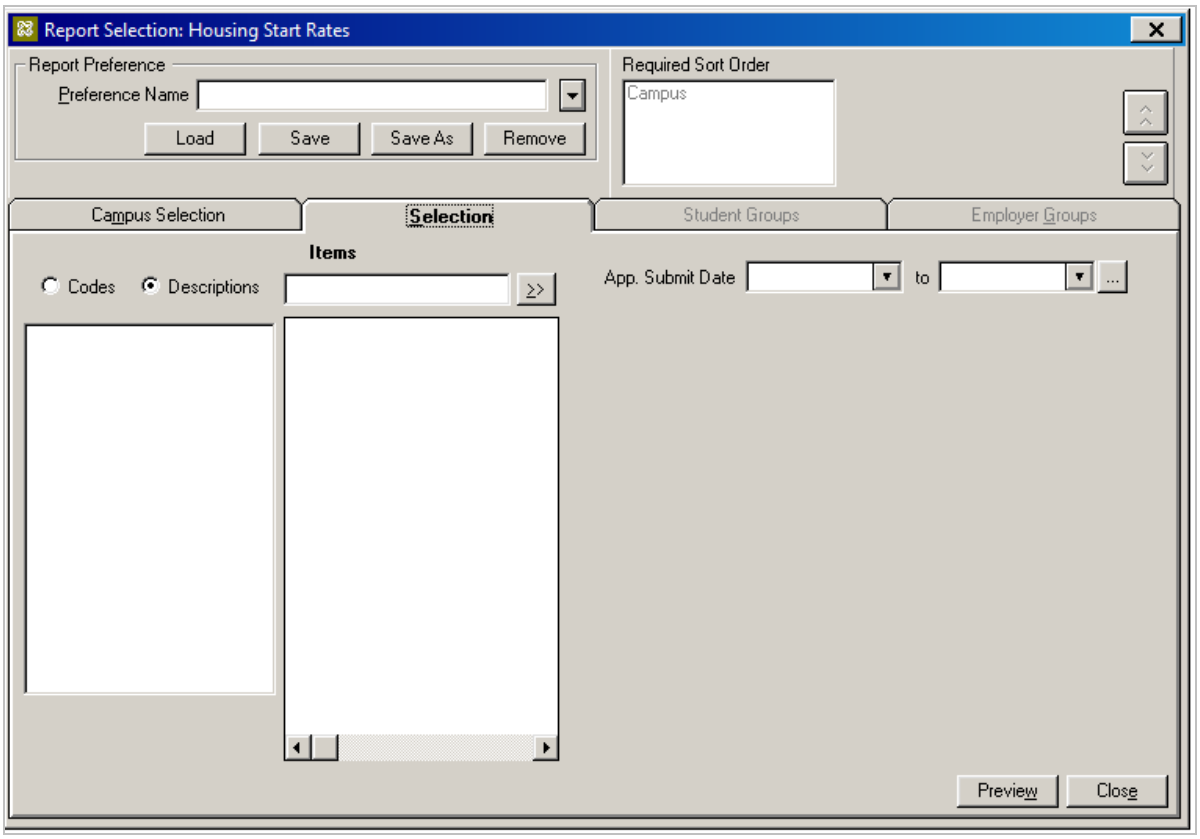
Page 1 of 1

Housing Start Rates

This report lists the number of applicants and the number of students who moved in a particular campus building during a specified period.

To run the report:

1. Navigate to **Reports > Housing > Housing Start Rates**. The Report Selection: Housing Start Rates form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

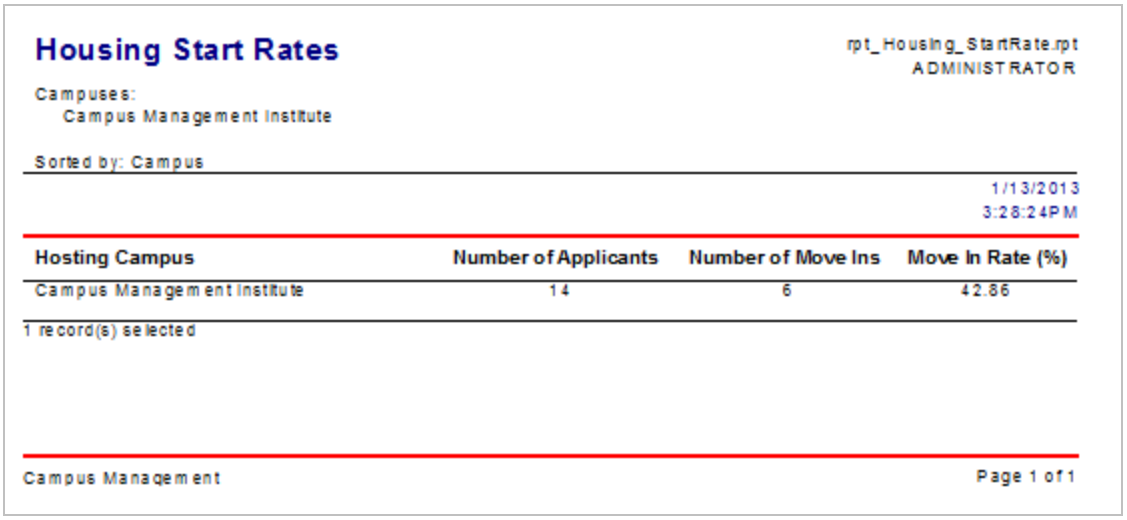


4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Hosting Campus
   - Number of Applicants
   - Number of Moves Ins

- Move In Rate (percentage)



Housing Start Rates

rpt_Housing_StartRate.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute

Sorted by: Campus

1/13/2013
3:28:24PM

Hosting Campus	Number of Applicants	Number of Move Ins	Move In Rate (%)
Campus Management Institute	14	6	42.86

1 record(s) selected

Campus Management

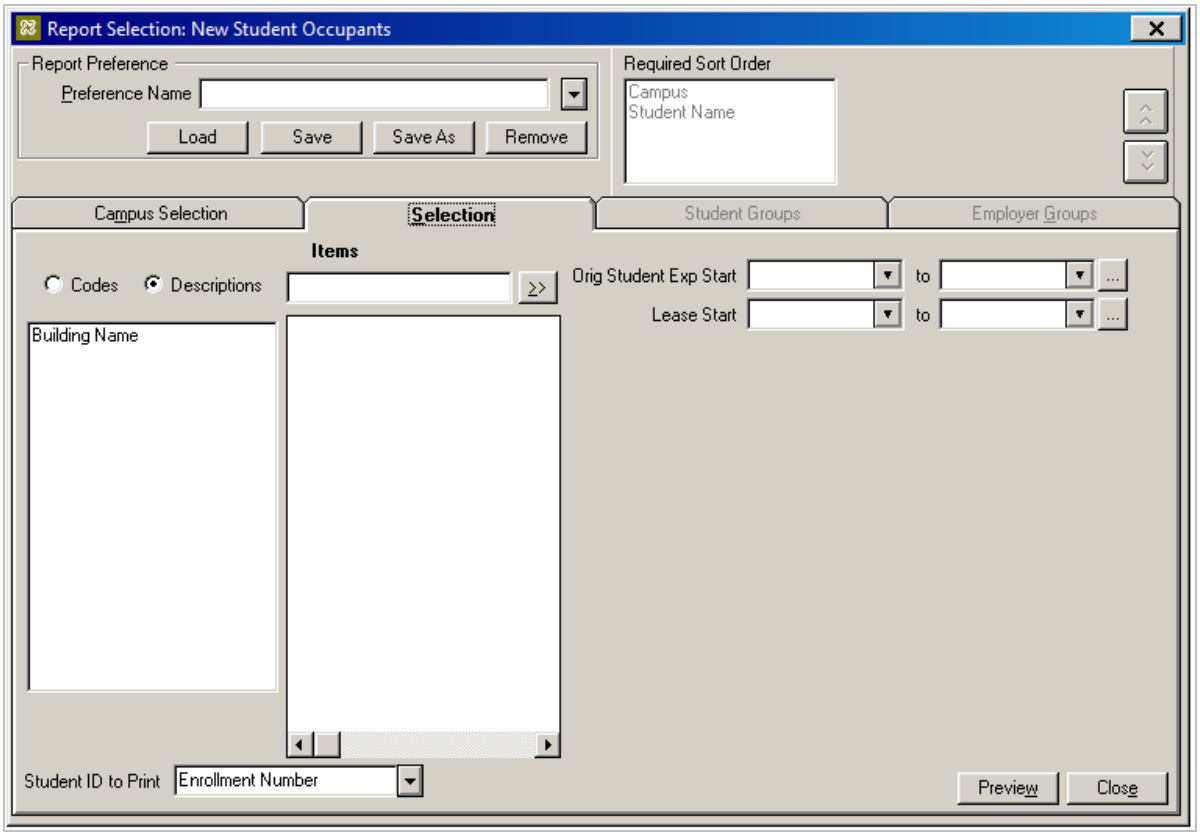
Page 1 of 1

New Student Occupants

This report lists the new students assigned to the housing facility in a particular campus building.

To run the report:

1. Navigate to **Reports > Housing > New Student Occupants**. The Report Selection: New Student Occupants form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



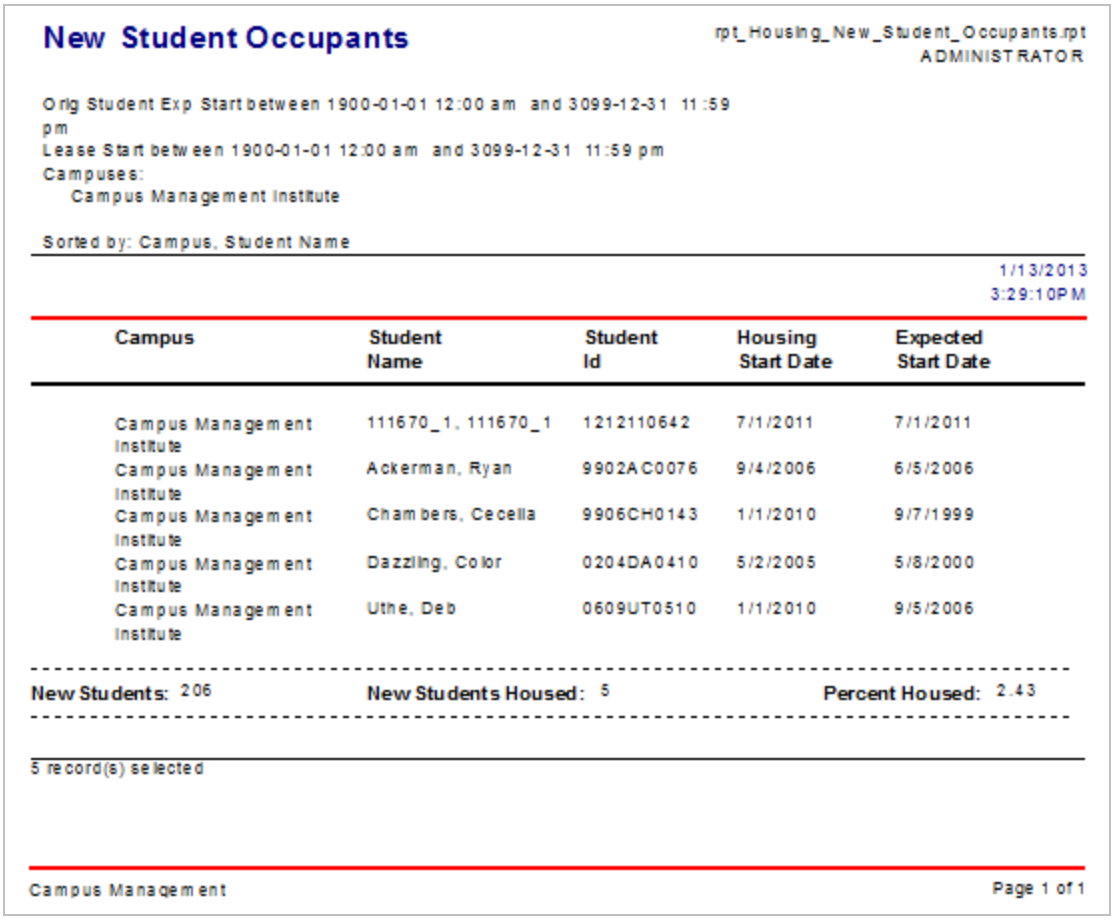
4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Campus
   - Student Name and ID
   - Housing Start Date
   - Expected School Start Date

   The report also displays the total number of new students joining the campus and the number and percentage of stu-

dents housed.



New Student Occupants

rpt_Housing_New_Student_Occupants.rpt
ADMINISTRATOR

Orig Student Exp Start between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Lease Start between 1900-01-01 12:00 am and 3099-12-31 11:59 pm
Campuses:
Campus Management Institute

Sorted by: Campus, Student Name

1/13/2013
3:29:10PM

Campus	Student Name	Student Id	Housing Start Date	Expected Start Date
Campus Management Institute	111670_1, 111670_1	1212110642	7/1/2011	7/1/2011
Campus Management Institute	Ackerman, Ryan	9902AC0076	9/4/2006	6/5/2006
Campus Management Institute	Chambers, Cecelia	9906CH0143	1/1/2010	9/7/1999
Campus Management Institute	Dazzling, Color	0204DA0410	5/2/2005	5/8/2000
Campus Management Institute	Uthe, Deb	0609UT0510	1/1/2010	9/5/2006

New Students: 206 **New Students Housed:** 5 **Percent Housed:** 2.43

5 record(s) selected

Campus Management

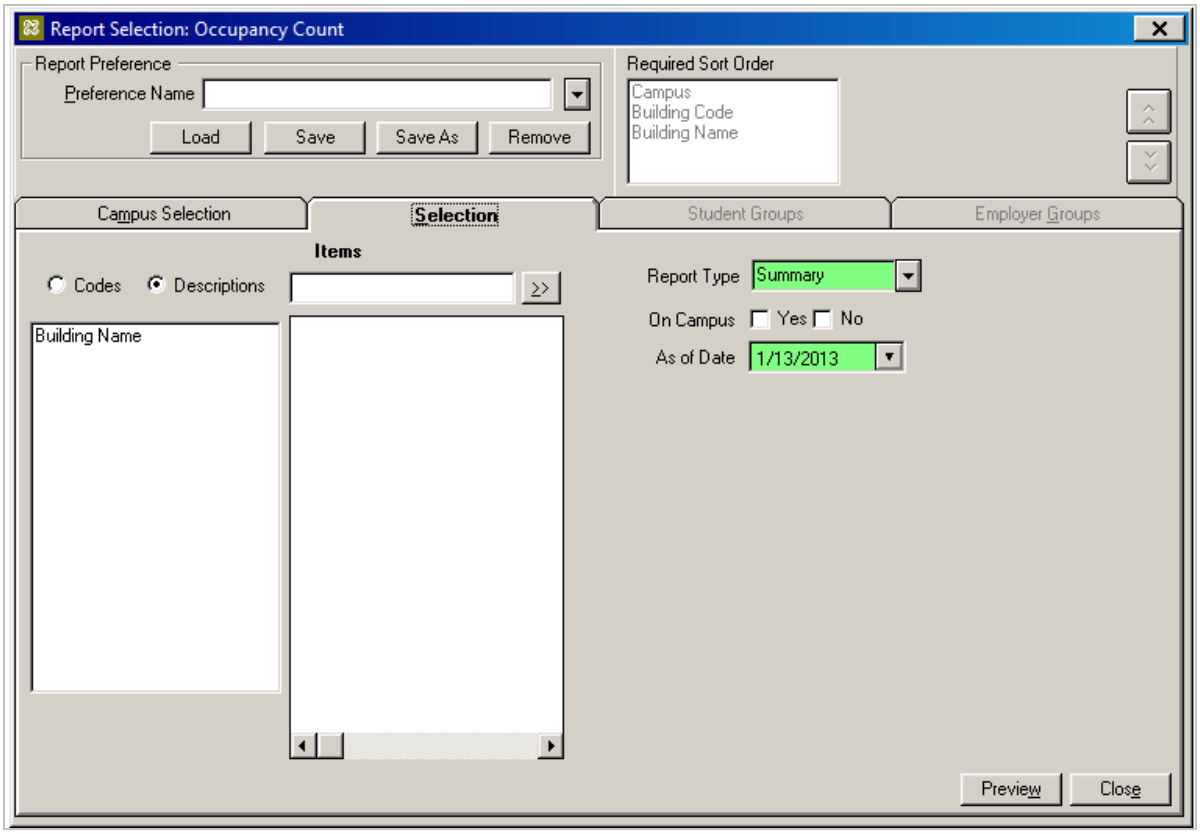
Page 1 of 1

Occupancy Count

This report lists the total number of students housed in a particular campus building.

To run the report:

1. Navigate to **Reports > Housing > Occupancy Count**. The Report Selection: Occupancy Count form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   Detail lines of the summary report include:

   - Building Code
   - Building Name
   - Hosting Campus and Location
   - Normal and Maximum Capacity of the building
   - Current occupancy

   If the detailed report type is selected, the following additional columns are displayed:

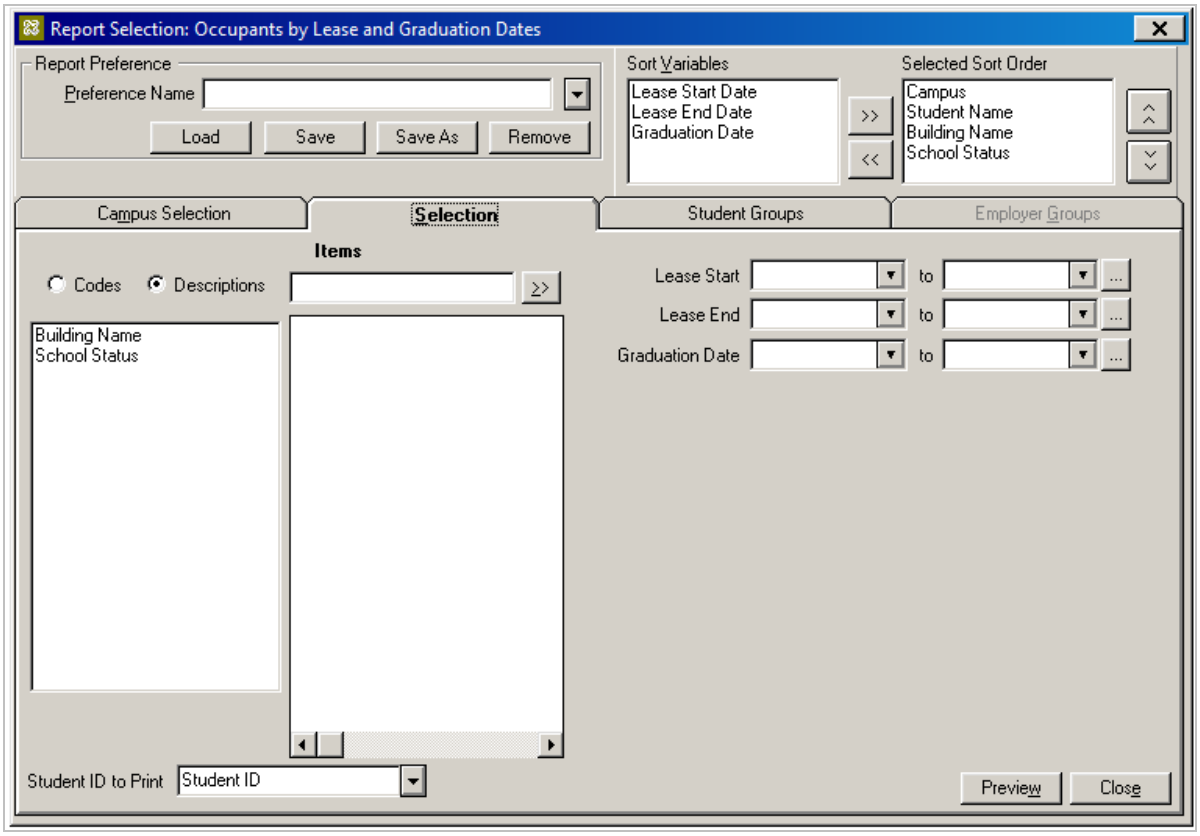
   - Room Number and Category
   - Suite Number and Category

Occupants by Lease and Graduation Dates

This report displays the number of occupants in a campus building based on the lease and graduation dates.

To run the report:

1. Navigate to **Reports > Housing > Occupants By Lease and Graduation Dates**. The Report Selection: Occupants By Lease and Graduation Dates form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

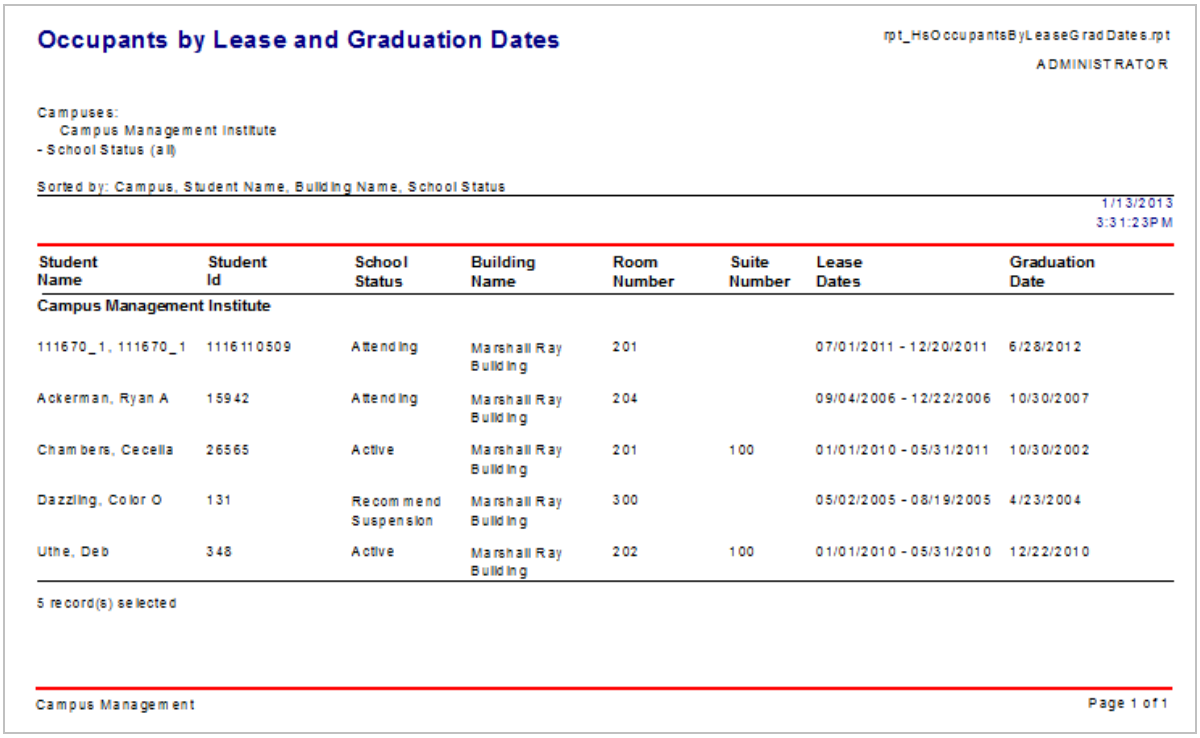
   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name and ID
   - School Status
   - Building Name
   - Room and Suite Numbers
   - Lease Dates

- Graduation Date



Occupants by Lease and Graduation Dates

rpt_HsOccupantsByLeaseGradDates.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute
- School Status (all)

Sorted by: Campus, Student Name, Building Name, School Status

1/13/2013
3:31:23PM

Student Name	Student Id	School Status	Building Name	Room Number	Suite Number	Lease Dates	Graduation Date
Campus Management Institute							
111670_1, 111670_1	1116110509	Attending	Marshall Ray Building	201		07/01/2011 - 12/20/2011	6/28/2012
Ackerman, Ryan A	15942	Attending	Marshall Ray Building	204		09/04/2006 - 12/22/2006	10/30/2007
Chambers, Cecelia	26565	Active	Marshall Ray Building	201	100	01/01/2010 - 05/31/2011	10/30/2002
Dazzling, Color O	131	Recommend Suspension	Marshall Ray Building	300		05/02/2005 - 08/19/2005	4/23/2004
Uthe, Deb	348	Active	Marshall Ray Building	202	100	01/01/2010 - 05/31/2010	12/22/2010

5 record(s) selected

Campus Management
Page 1 of 1

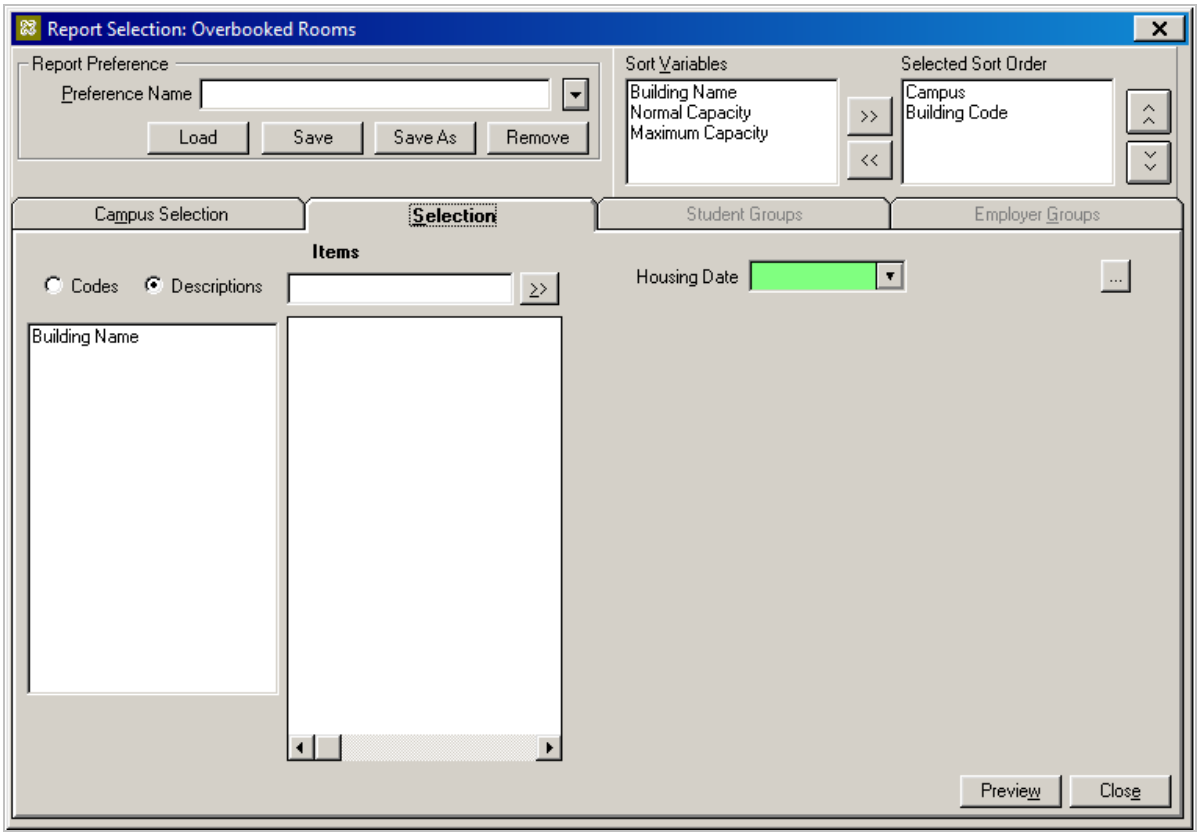
Overbooked Rooms

This report summarizes the details of overbooked rooms in a particular campus building on a specified date.

Note: Rooms are called overbooked if the number of occupants exceeds the normal capacity of the room.

To run the report:

1. Navigate to **Reports > Housing > Overbooked Rooms**. The Report Selection: Overbooked Rooms form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

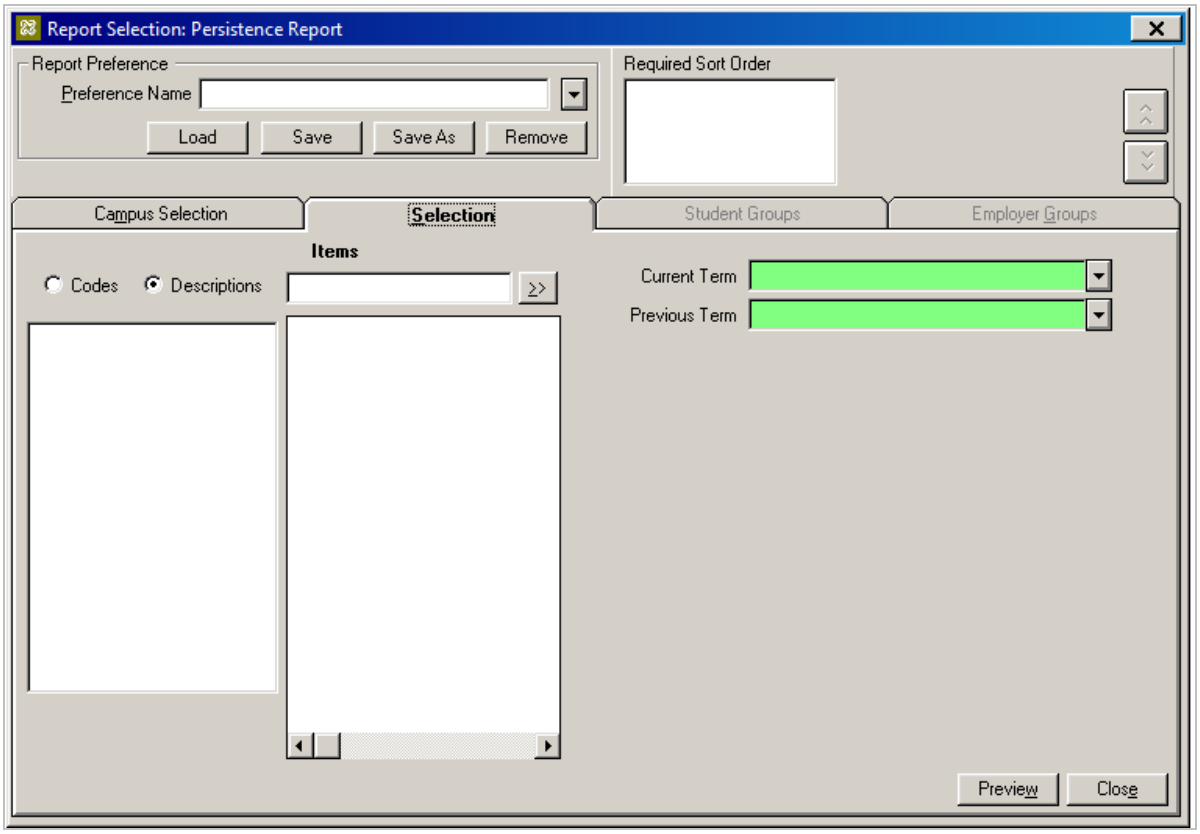
   - Building Code
   - Category and Name
   - Campus Location
   - Room Number and Category
   - Suite Number and Category
   - Normal and Maximum Capacity of both the campus and individual rooms

Persistence Report

This report details the number of students (from the last term) persisting with the housing facility in a particular campus.

To run the report:

1. Navigate to **Reports > Housing > Persistence Report**. The Report Selection: Persistence Report form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

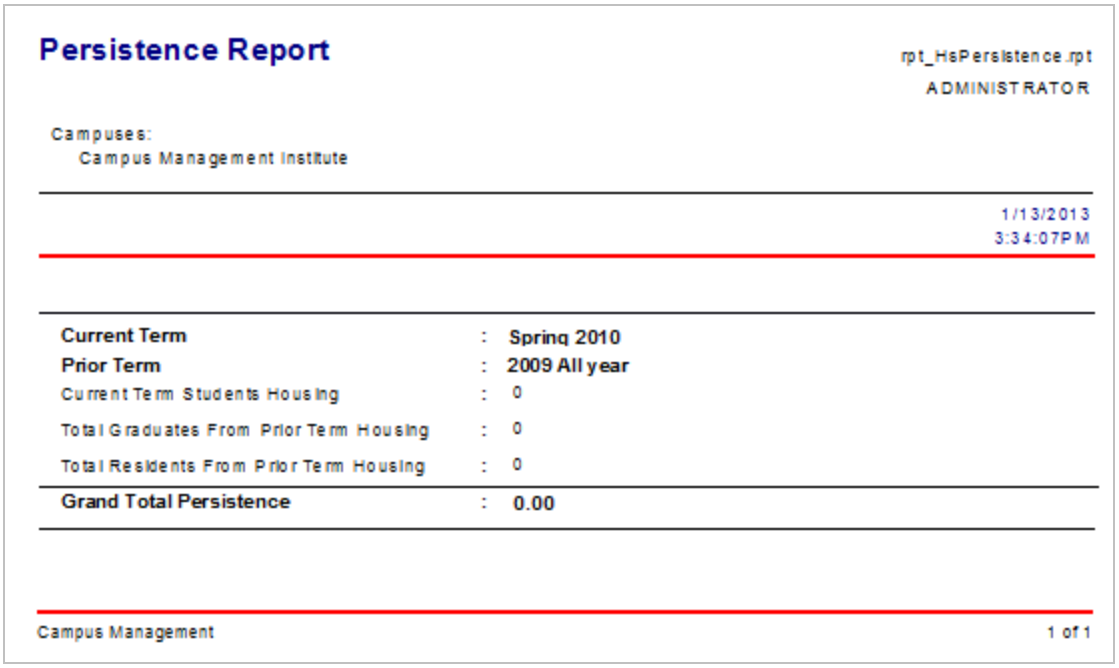


4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Current Term
   - Prior Term
   - Current Term Students Housing
   - Total Graduates From Prior Term Housing

- Total Resident From Prior Term Housing



Persistence Report

rpt_HsPersistence.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute

1/13/2013
3:34:07PM

Current Term	:	**Spring 2010**
Prior Term	:	**2009 All year**
Current Term Students Housing	:	0
Total Graduates From Prior Term Housing	:	0
Total Residents From Prior Term Housing	:	0
Grand Total Persistence	:	**0.00**

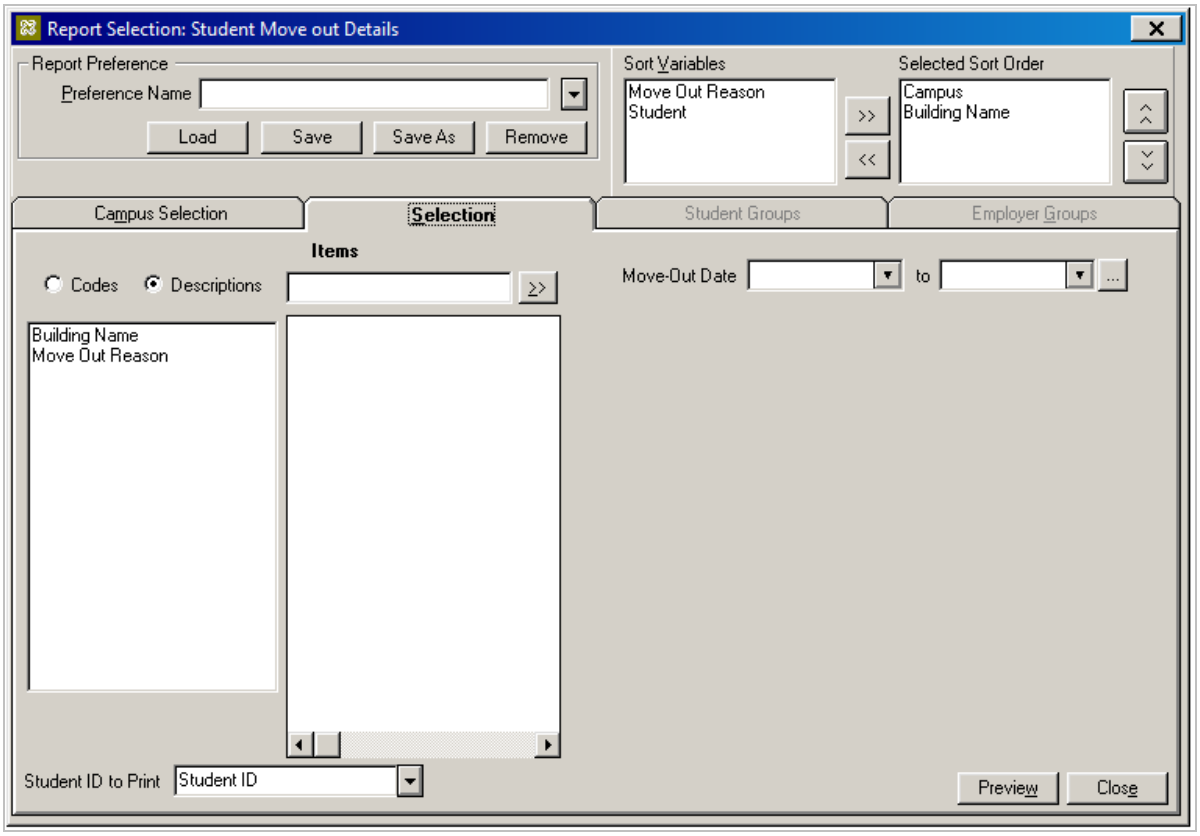
Campus Management 1 of 1

Student Move Out Details

This report displays the details of students moving out of a campus building within a specified time period.

To run the report:

1. Navigate to **Reports > Housing > Student Move Out Details**. The Report Selection: Student Move Out Details form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.

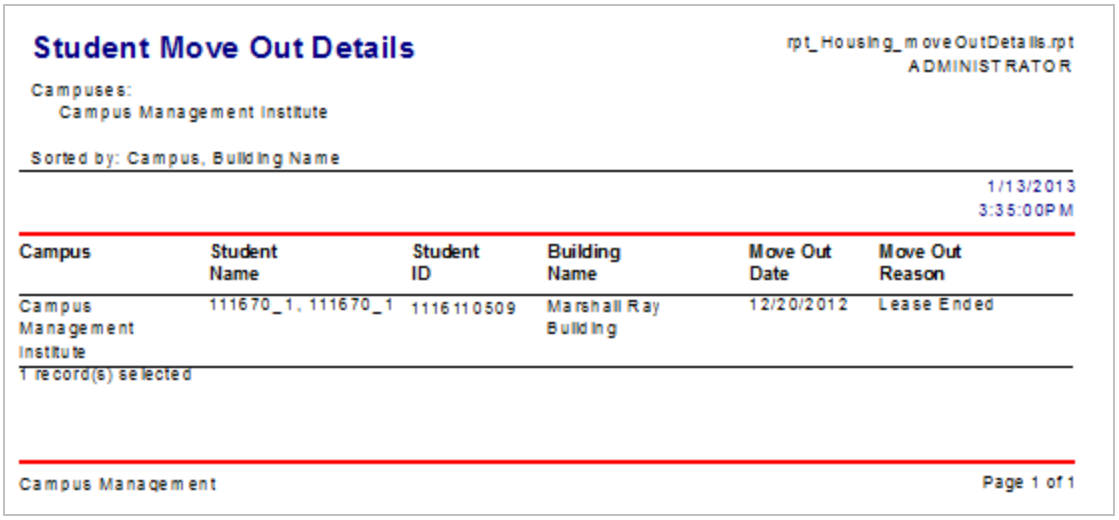


4. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Campus
   - Student Name and ID
   - Building Name
   - Move Out Date

- Move Out Reason



Student Move Out Details

rpt_Housing_moveOutDetails.rpt
ADMINISTRATOR

Campuses:
Campus Management Institute

Sorted by: Campus, Building Name

1/13/2013
3:35:00PM

Campus	Student Name	Student ID	Building Name	Move Out Date	Move Out Reason
Campus Management Institute	111670_1, 111670_1	1116110509	Marshall Ray Building	12/20/2012	Lease Ended

1 record(s) selected

Campus Management

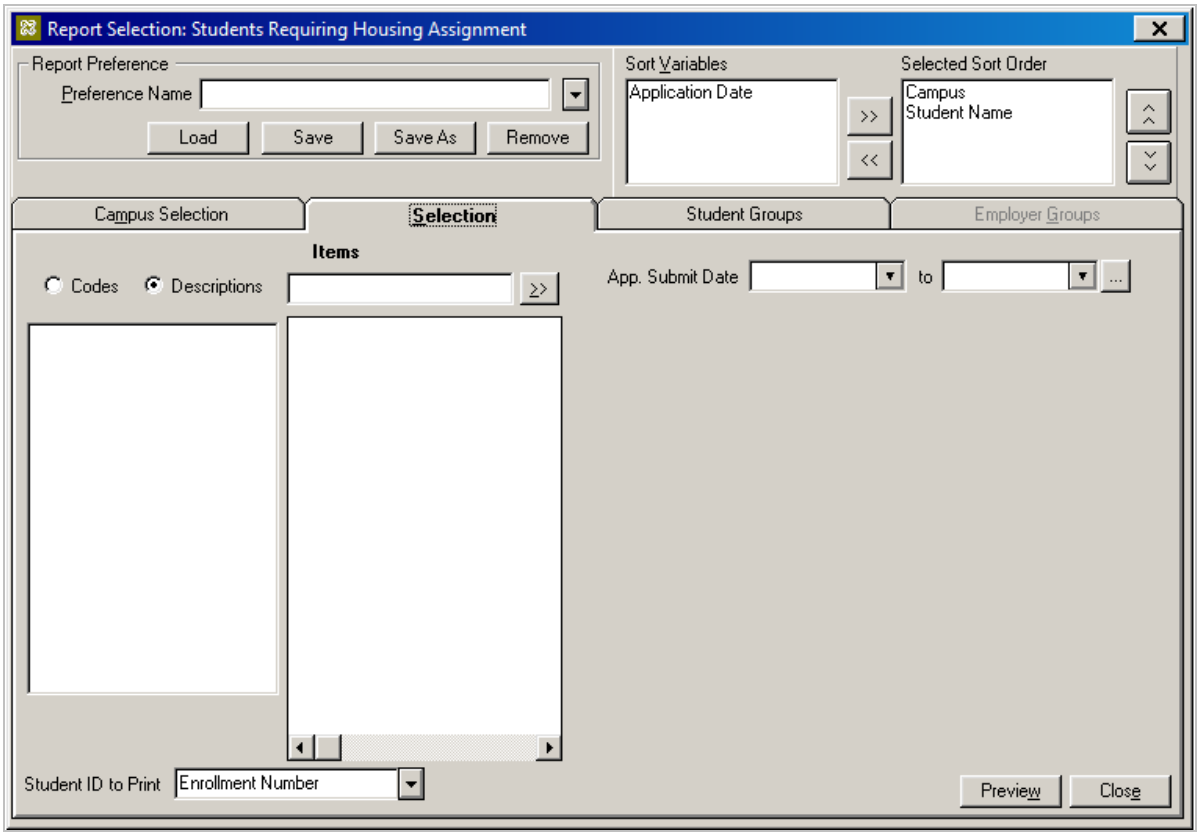
Page 1 of 1

Students Requiring Housing Assignment

This report details the students who have applied for housing in a particular campus building within a specified time period.

To run the report:

1. Navigate to **Reports > Housing > Students Requiring Housing Assignment**. The Report Selection: Students Requiring Housing Assignment form is displayed.
2. On the Campus Selection tab, select appropriate options and click **Continue**.
3. Select appropriate options on the Selection tab.



4. *Optional*: You can also use the **Student Groups** tab to filter report data.

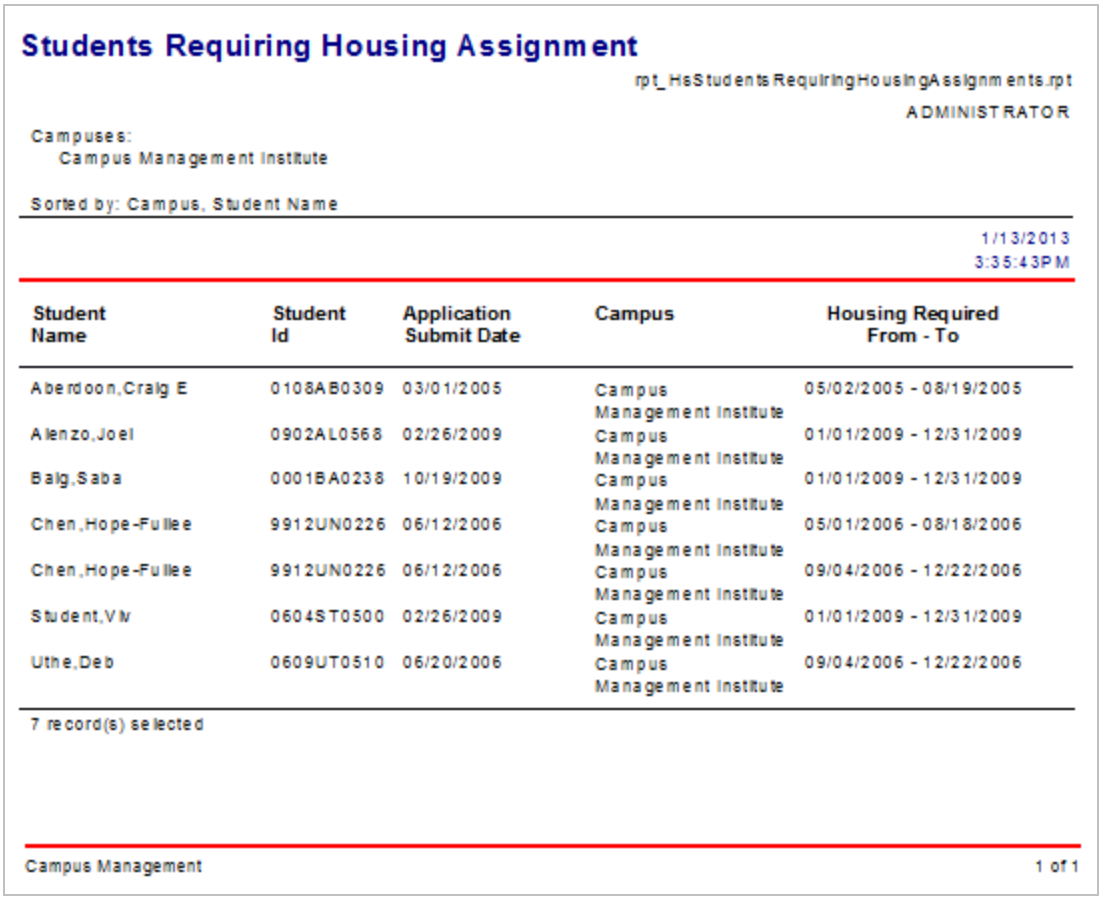
   Note: If you filter data by Student Groups, the Selection tab filters do not apply.

5. Click **Preview**. The report is assembled and displayed in the Report Viewer.

   The report displays the following details:

   - Student Name and ID
   - Application Submit Date
   - Campus

- Housing Required From - To



Students Requiring Housing Assignment

rpt_HsStudentsRequiringHousingAssignments.rpt

ADMINISTRATOR

Campuses:
Campus Management Institute

Sorted by: Campus, Student Name

1/13/2013
3:35:43PM

Student Name	Student Id	Application Submit Date	Campus	Housing Required From - To
Aberdoon,Craig E	0108AB0309	03/01/2005	Campus Management Institute	05/02/2005 - 08/19/2005
Alenzo,Joel	0902AL0568	02/26/2009	Campus Management Institute	01/01/2009 - 12/31/2009
Baig,Saba	0001BA0238	10/19/2009	Campus Management Institute	01/01/2009 - 12/31/2009
Chen,Hope-Fullee	9912UN0226	06/12/2006	Campus Management Institute	05/01/2006 - 08/18/2006
Chen,Hope-Fullee	9912UN0226	06/12/2006	Campus Management Institute	09/04/2006 - 12/22/2006
Student,Viv	0604ST0500	02/26/2009	Campus Management Institute	01/01/2009 - 12/31/2009
Uthe,Deb	0609UT0510	06/20/2006	Campus Management Institute	09/04/2006 - 12/22/2006

7 record(s) selected

Campus Management 1 of 1

Custom Reports

The *Custom Reports* option lists customized reports designed especially for your campus. Custom reports are developed by editing a CampusNexus Student generic report or by creating a new report.

Crystal Reports application software and system administrator privileges are required to customize reports. Crystal Reports products and training materials can be obtained from this website: http://www.crystalreports.com/.

To customize a generic CampusNexus Student report:

1. As system administrator, select the Setup > Report Maintenance option.
2. Double-click the generic report you want to copy. The selected report is displayed in the Custom tab.
3. Open SQL 7/Enterprise Manager and click on the SQL server group/server associated with CampusNexus Student in Databases > CampusNexus Student > Views.
    a. Find the `cst_` report you created and right-click the table. Select **Open Views** and **return all rows**. This opens the tables.
    b. Click the **Show/Hide diagram pane** icon.
    c. Right-click on the top, empty box area to open up a box to add a table.
    d. Click on the table you want to add.
    e. Click the buttons **Add** and then **Close**.
    f. Click on the field name that is similar in both tables and drag it to the other table that has the same name, to the same name (This joins the tables) (do not check the box).
    g. Click all the boxes (fields) you want to appear in the tables.
    h. Click the **Show/Hide Grid Pane** icon. Another section is displayed in your view.
    i. Click the **Alias** column and change the *expr1* to a *real description* to the fields you created.
    j. Click the **Verify SQL** icon.
    k. Click **OK** (to the syntax question).
    l. Click the **Explanation** icon to run the query.
    m. Go into the **Design View** and **Save**.
    n. Exit the file.
4. In Crystal Reports/32 Bit Crystal Report Designer, perform the following steps:
    a. Go to the server's c2000 directory/reports and open the custom report you just created.
    b. On the title bar, click on **Database** and verify the database.
    c. Click **OK** at the SA login. The verify record set box is displayed.
    d. In the left drop-down box entitled *Object type*, select **View**.
    e. In the **Object** box, select the report you customized (this pulls the two tables together).
    f. From the Design View tab, delete any unwanted items in the report.

g. From the Insert menu, select **Insert database field**. A list of the fields in the tables you selected is displayed.

h. Click the fields you want to add and drag them to the **Details** portion of your report.

i. Create a title by using **Create text box** in the page header. Right-click the field and format the field.

j. Click the **Common** tab to *Horizontal Align = left* and click **OK**.

k. Select **File > Print Preview**.

l. Go to **Design** and check the sort and selections to delete or add the fields you changed.

m. Click **Save**.

5. In CampusNexus Student, from the Report menu select the module associated with the new report. The custom report is displayed with an asterisk (*) to distinguish it from the original report. Run the custom report like you would any other report.

Creating Custom Reports

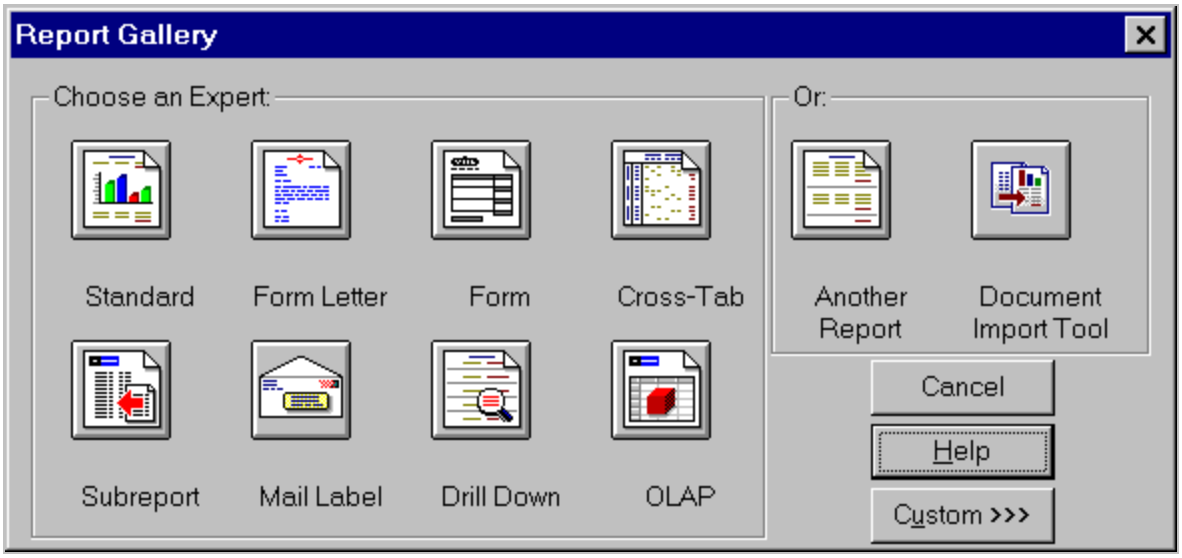
A client version of the Crystal Reports application can be used to create custom reports for CampusNexus Student data. The application uses a drag and drop interface associated with a data dictionary for easy creation of customized reports.

A report typically contains the following sections:

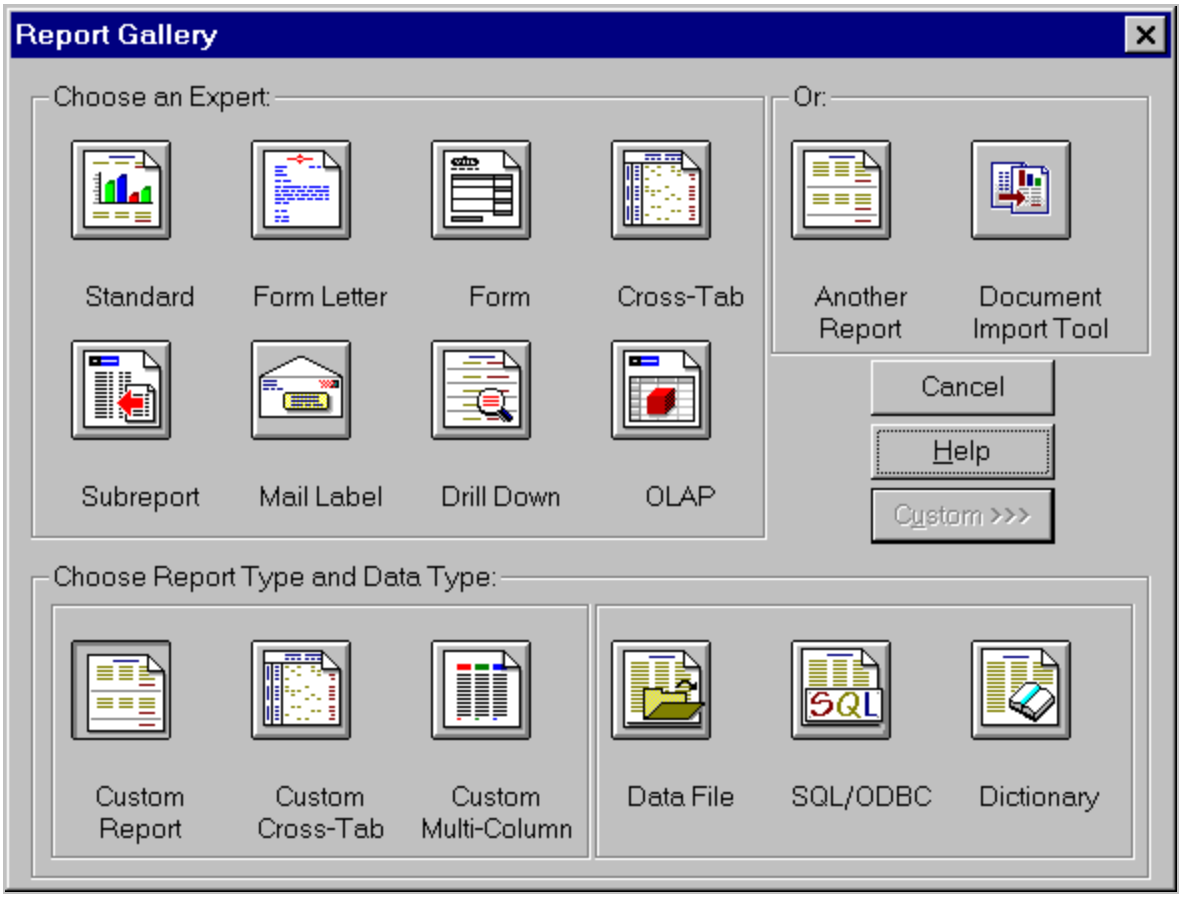
- Report Header – stores the general report information that is displayed on the first page of the report, e.g., report title.
- Page Header – stores the information that is repeated at the top of each page, e.g., page numbers or field titles.
- Details section – contains the report data.
- Report Footer and Page Footer – are the same as the Report Header and Page Header, only they appear at the bottom of the report and page.

To create a Custom Report:

1. Open the **Crystal Reports** application.
2. From the File menu, select **New**. The Report Gallery is displayed.

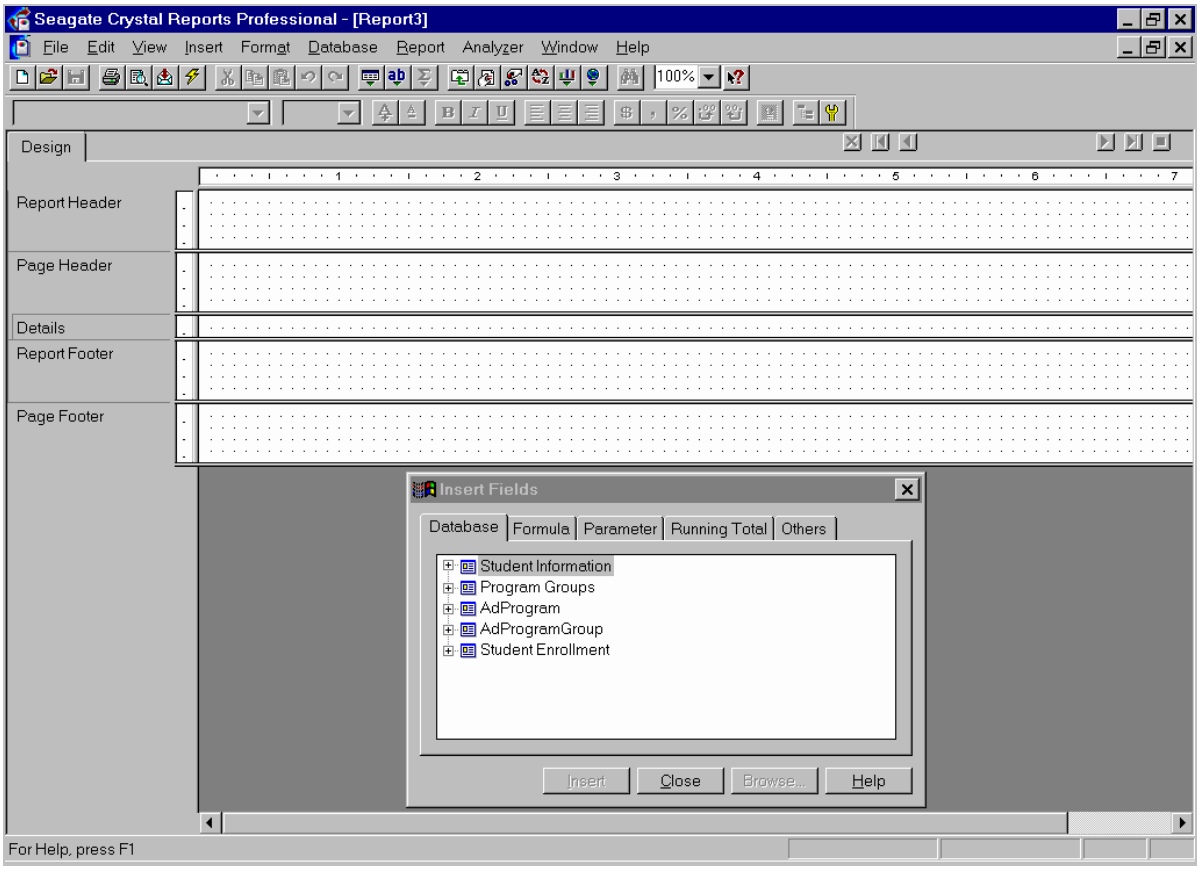


3. In the *Report Gallery*, click the **Custom >>>** button.
4. Click the **Dictionary** icon.



5. Select a dictionary (or select *auto-open dictionary* from the *Options* menu).

   The *Design* tab is displayed along with the *Insert Fields* form.



6. On the *Database* tab of the *Insert Fields* form, click the plus sign (**+**) to the left of a database.

   The fields of the selected database are displayed.

7. Double-click a field or select a field and press the **Insert** button. Place the field in the appropriate section of your report.

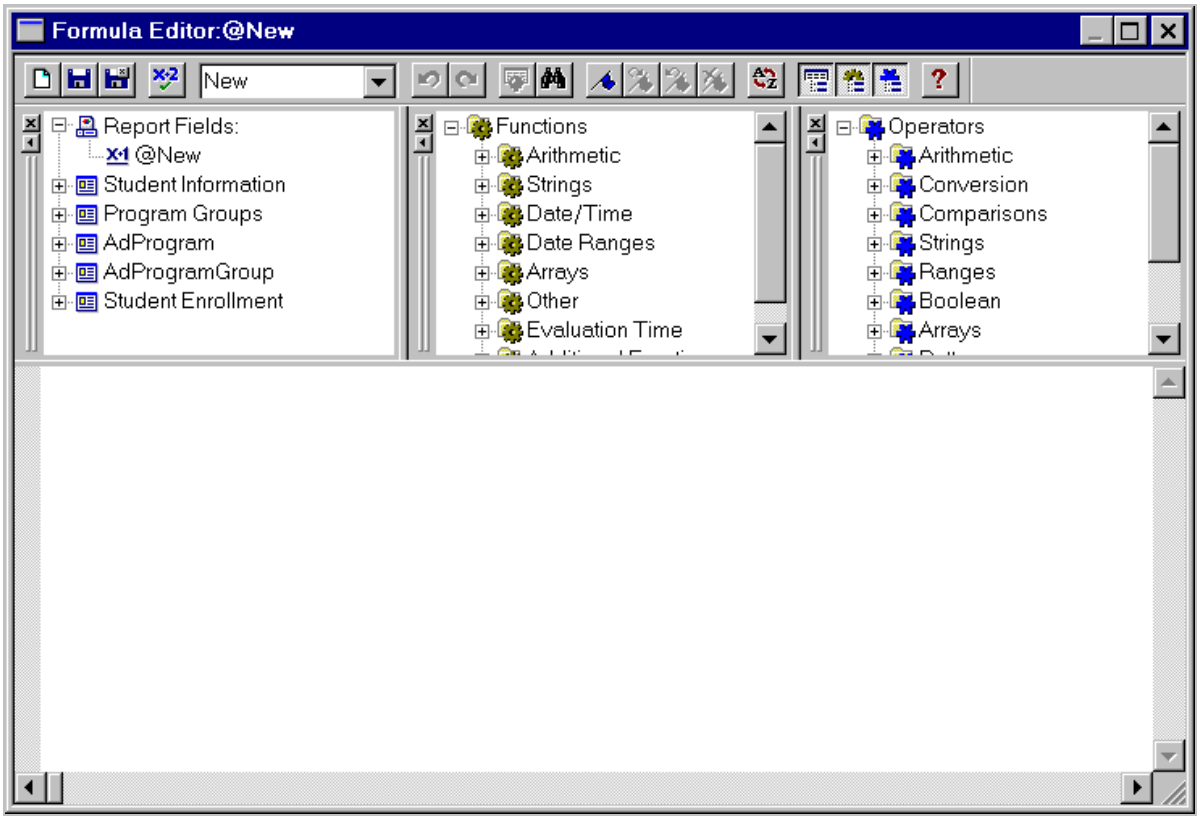
   Note: When you place a field in the *Details* section, a title is created automatically in the *Page Header*.

8. Select **Preview** from the *File* menu and check your report design.

9. To insert a formula into the report, click the **Formula** tab. Click **New** and type a name for the formula.

   The *Formula Editor* is displayed. It is organized as follows:

   - The list on the left contains the fields from the database.
   - The list in the middle contains the functions that can be used to construct a formula.
   - The list on the right contains the operators that can be used to construct a formula.



Use the *Formula Editor* to create a formula.

Example: To create a formula that checks if the Enrolled Date is less than the Graduation Date, perform the following steps in the Formula Editor:

a. Double-click the **EnrollDate** field under *Student Enrollment*.

b. Double-click the **Less than** operator under *Comparisons*.

c. Double-click the **GradDate** field.

d. **Save** the formula.

e. **Close** the Formula Editor.

10. If the report requires a running total of the data (e.g., total number of students), perform the following steps:

a. Click the **Running Total** tab.

b. Click **New** and type a name for the running total field.

c. Select the field on the left that you want to use for the running total.

d. Select a **Type of Summary** option.

e. Select an option in the **Evaluate** section.

- The *For each record* option evaluates each record in a field.
- The *On change of field* option performs its evaluation only when a specified field has changed.
- The *On change of group* option performs its evaluation only when a specified group has changed.
- The *Use a formula* option uses a formula when performing its calculations.

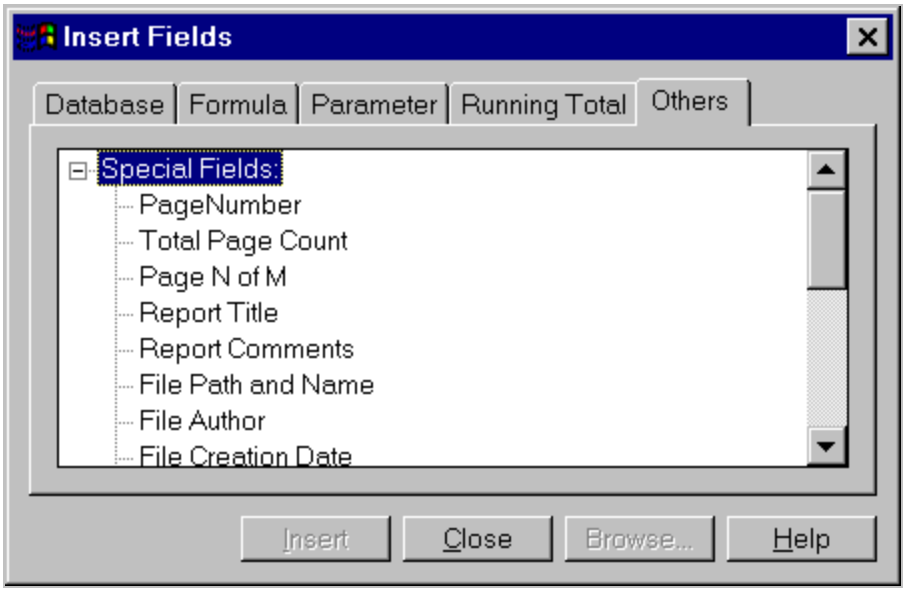
f. Select an option in the **Reset** section.

- The *Never* option locks your running total field, i.e., the running total performs its calculations on that field throughout the entire report.
- The *On change of field* option resets the running total when a designated field changes. Use the Add button (>) to copy a field from the *Available Tables and Fields* list box.
- The *On change of group* option resets a running total evaluate when a designated group changes. Use the Add button (>) to copy a field from the *Available Tables and Fields* list box.
- The *Use a formula* option uses a formula to reset the running total.

g. Click **OK**.

h. Click **Insert** to insert the running total into the report.

11. To include the page number, file name, or other information on a report, click the **Others** tab on the *Insert Fields* form. Select the appropriate field and click **Insert** to insert it onto the report.



Selecting and Sorting Records

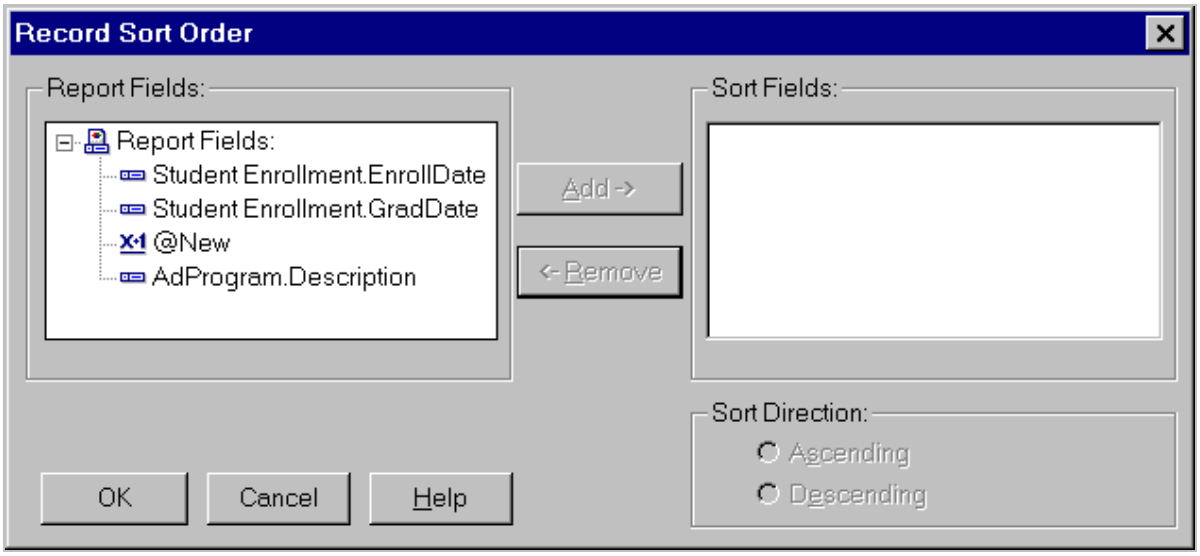
To select records from a report:

1. From the *Report* menu, select **Select Expert**.
2. Select the **field** that you want to select the data from.
3. Select the **criteria** for your selection.
4. Click **OK**.

The selected information is displayed.

To sort records in a report:

1. From the *Report* menu, select **Sort Records**. The *Record Sort Order* form is displayed.
2. From the *Report Fields* list, select the **field** that you want to sort on.
3. Click **Add**.
4. Select a Sort Direction: **Ascending** or **Descending** .



5. Click **OK**.

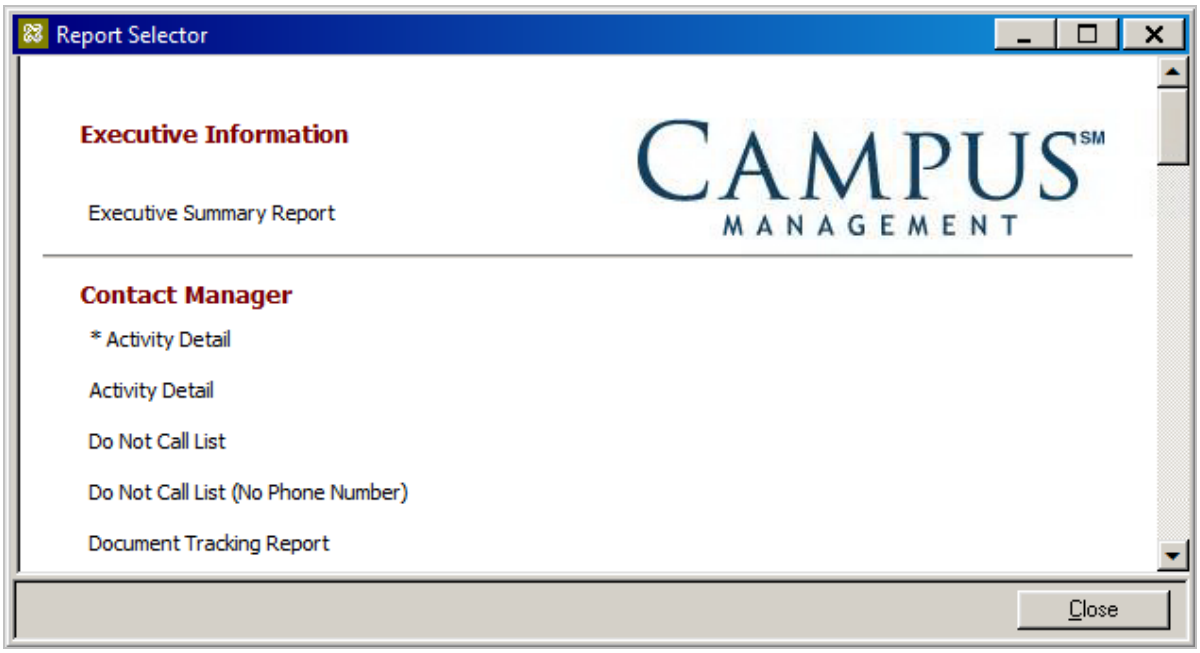
Using the Report Selector

The Open Report Selector option displays the Report Selector form. This form lists all the reports that are available on the Reports menu and its submenus. It is an alternate method of finding and running the reports that you are permitted to access.

Note: The Report Selector does not list reports that are run from locations other than the Reports menu.

To view a report using the Report Selector:

1. Select **Reports** > **Open Report Selector**. The Report Selector form is displayed.



2. Use the scroll bar to locate a report in the list. Click the report name to start the report.

   – OR –

   Use the **Tab** and **Shift+Tab** keys to locate a report. When the name of the report you want is marked with dotted lines, press **Enter**to start the report.

3. Click **Close** to close the form.

Window Menu

This menu lists the open windows in CampusNexus Student. The list of items changes as you open and close windows (or forms). The active window is indicated by a check mark to the left of the item name.

The menu also includes options to arrange windows in the work area in tiled or cascaded format.

Tools Menu

This menu provides the following options:

- Contact Manager
- Admissions
- Financial Aid
- Student Accounts
- Academic Records
- Career Services
- Loan Management (No tools are available for this option.)
- System

Tools > Contact Manager

The Tools > Contact Manager submenu options are as follows:

- National Do Not Call Import
- National Do Not Call Student Update
- Delete Batch Activities
- Import ZIP Code Data
- Unlock Activities

National Do Not Call Import

The FTC requires telemarketers (including institutions who call clients or students) to honor the request of prospects and customers not to call their homes. Specific rules determine when it is lawful to call a prospect or a person with an existing business relationship. Failure to adhere to these rules can result in fines.

The National Do Not Call Registry phone list is available for purchase in its entirety, by state, or by area code. The list contains phone numbers that have been registered with the FTC by consumers as restricted.

Additional information can be found at the following websites:

- https://www.donotcall.gov/ - Site where clients or students can register a phone number with the National Do Not Call list.
- https://telemarketing.donotcall.gov/ - Site where telemarketers (institutions) can download phone lists.
- https://www.ftc.gov/ - The FTC's Do Not Call main information page.

New Database Installation

To implement the National Do Not Call Registry features, CampusNexus Student creates a new database called C2000_DNC on the server where your database resides. This database contains a single table (syNationalDNC) with a single column (phone number). The FTC data file is imported to this destination, and it serves as the primary reference for matching student phone numbers to be compliant with the FTC requirements.

Note: This database creates a large (approximately 1.5 GB) data file to hold the entire current Do Not Call Registry file list. If your database server does not have sufficient available space, the database will NOT be created. Consult your database administrator for information regarding hard disk space requirements.

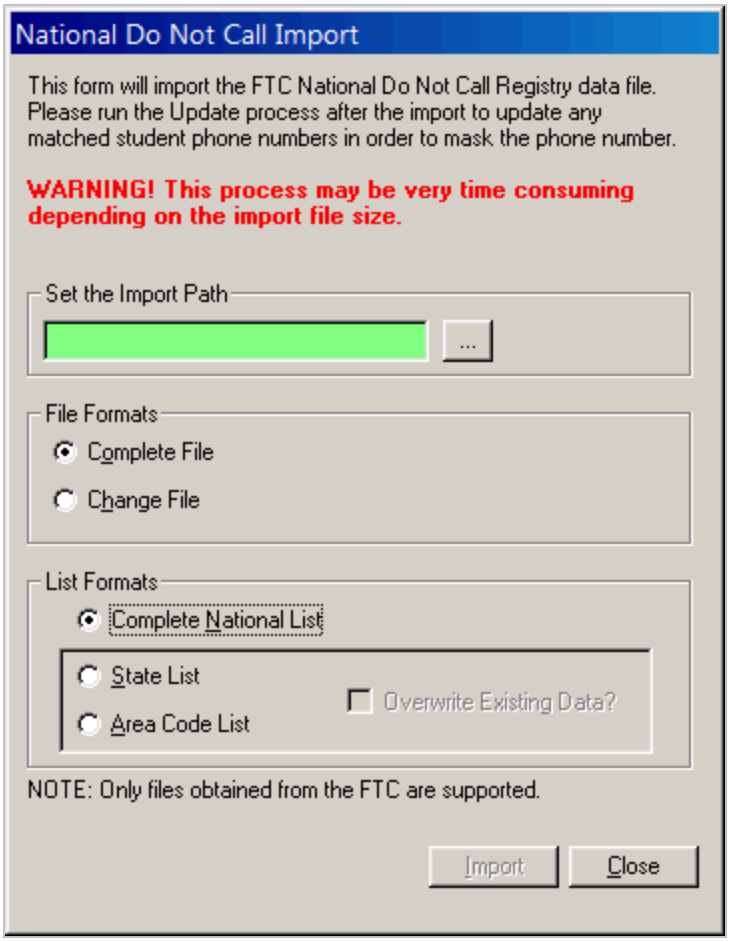
If you do not plan to import the entire list, the C2000_DNC database can be created with a smaller file.

Use CampusNexus Student utilities to import a downloaded Do Not Call Registry file into the CampusNexus Student DNC database. You can also import files and append them to the existing data.

Note: Depending on the type of file downloaded, this import process can be time consuming.

To import the Do Not Call Registry:

1. Download the DNC file from the National Do Not Call Registry and store it on the computer where you will be running the import tool.
2. Navigate to **Tools** > **Contact Manager** > **National Do Not Call Import**. The National Do Not Call Import form is displayed.



3. Specify the path to the downloaded file or click ... to select the file.
4. Select the **File Format**. The options are:
    - Complete File – the entire list of phone numbers for the type of downloaded file (All Area Codes, Entire State, Multiple Area Codes, Single Area Code).
    - Change File – only phone numbers for the type of downloaded file (All Area Codes, Entire State, Multiple Area Codes, Single Area Code) that have been added or deleted since the last update by the FTC.

    Each of these file types is available in two formats:

    - Comma-delimited flat text file (for the full list) containing one 3-digit area code and 7-digit telephone number per line, separated by a comma, with a carriage return at the end of each line. The file (for the change list) has several data items per record, separated by commas.
    - XML tagged file containing both data and markers ("tags") with information in angle brackets that indicate the nature of the data.
5. Select the **List Format**. The options are:
    - Complete National List (default)
    - State List
    - Area Code List

If you select Complete National List, CampusNexus Student resets everything currently in the database and creates the DNC table based on the imported file.

If you select State List or Area Code List, you can select **Overwrite Existing Data**. If this option is not selected (default), data is appended to the existing table.

6. Click **Import** to begin the import process.

Masking of Phone Numbers

Fields that display phone numbers on Student Master, Contact Manager, Contact Methods, and Addresses forms dynamically display or mask phone numbers based on date criteria defined by the user based on system status as indicated below.

All admissions reports that display a phone number match the phone number from the DNC list and mask the phone number if it meets the criteria listed below for screening.

Conditions for the Masking of Phone Numbers

If the student's status is...	the phone number is...
Active or Leave of Absence	visible
Lead and the most recent Lead Date is less than 90 days	visible
Lead and the most recent Lead Date is greater than 90 days	masked, unless a DNC override is on file
Enrolled and Never Attended and the last transaction date or last date of attendance is less than 18 months	visible
Enrolled and Never Attended and the last transaction date or last date of attendance is greater than 18 months	masked, unless a DNC override is on file
Graduated or Dropped and the last transaction date is less than 18 months	visible
Graduated or Dropped and the last transaction date is greater than 18 months.	masked, unless a DNC override is on file

National Do Not Call Student Update

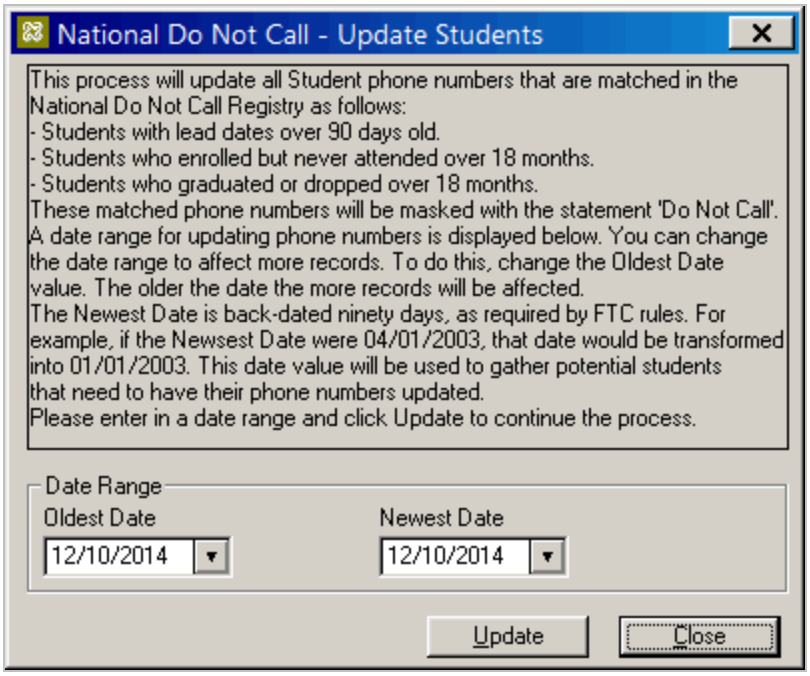
After you have imported the FTC Do Not Call file into the CampusNexus Student DNC database (see National Do Not Call Import), you can perform an update. Any student who was added to the DNC list will be added to the CampusNexus Student database.

The update process gathers all numbers that have a Newest Date within the date range provided, adjusted for 90 days back-dating on the Newest Date value. Any matched phone numbers (phone, work phone, or other/secondary phone) in the CampusNexus Student DNC database are replaced with the text *Do Not Call*. The original phone number is stored in a cross-reference table.

An override document stores exceptions to the DNC list. Students with phone numbers listed on the DNC list, but who permit phone calls from the institution, require an override to comply with FTC rules. Identify the override document in **Setup > Campus Locations > Contact Manager** (tab). During updates, if the phone number is also on file for the defined override document, the phone number is restored and displayed as a number that is permissible to call.

To update phone numbers:

1. Navigate to **Tools** > **Contact Manager** > **National Do Not Call Student Update**. The National Do Not Call Student Update form is displayed.



2. The default for the date range fields is today's date. You can change the **Oldest Date** value to affect more records. The older the date, the more records are affected.

   The **Newest Date** is back-dated 90 days, as required by FTC rules. For example, if the Newest Date is 04/01/2012, that date is transformed into 01/01/2012. This date value is used to gather potential students who need to have their phone numbers updated.

3. Click **Update** to begin the updating process. This may be time-consuming, depending on the number of phone numbers in the CampusNexus Student DNC database.

Do Not Call Registry Reporting

A report is available to list all students whose phone numbers were matched and updated by the CampusNexus Student DNC Update process.

To view the report, navigate to **Reports > Contact Manager >** Do Not Call List.

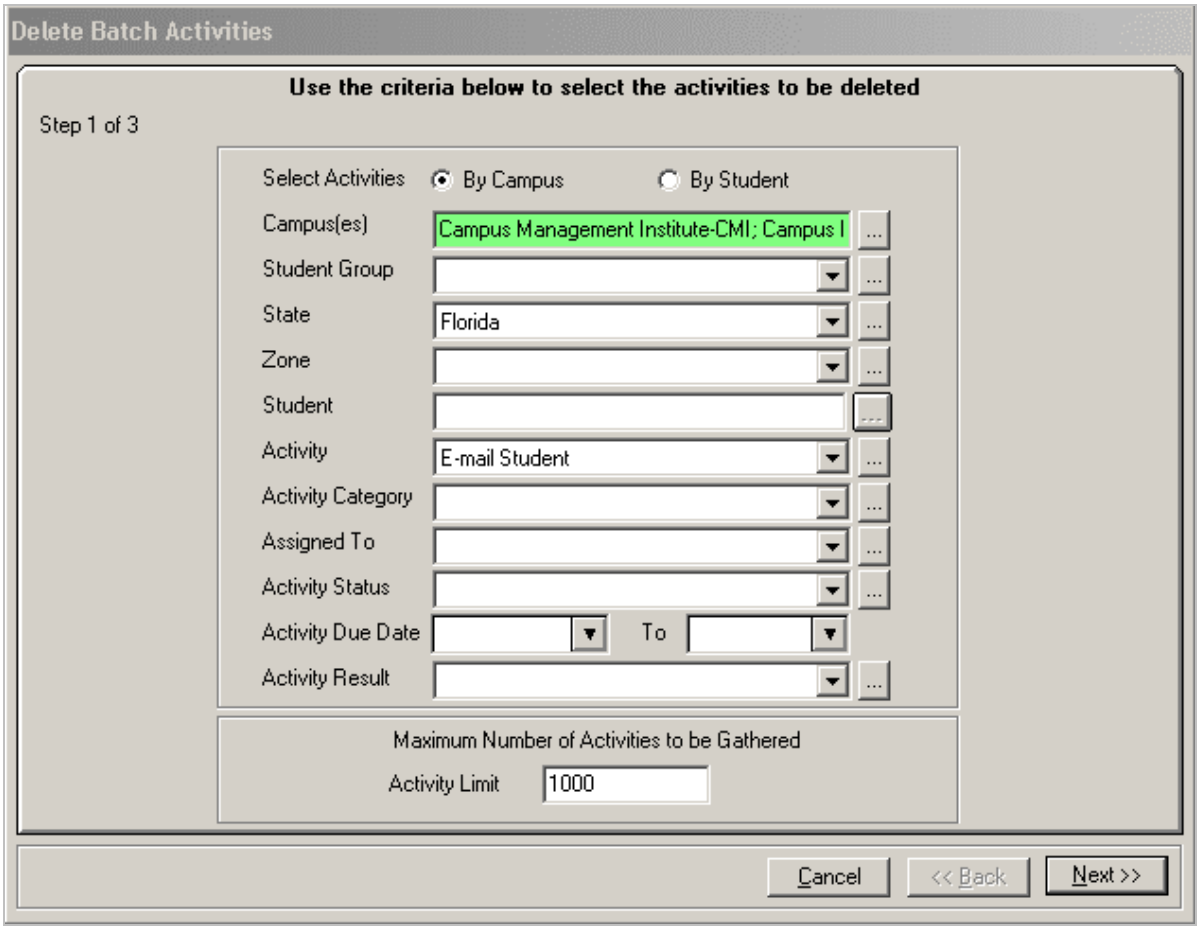
Deleting Batch Activities

You can delete batch activities in Contact Manager, for example, remove activities that have been added to student records erroneously or remove undeliverable emails from a staff member's Contact Manager. A notification confirms the batch action in progress and offers an option to cancel the action.

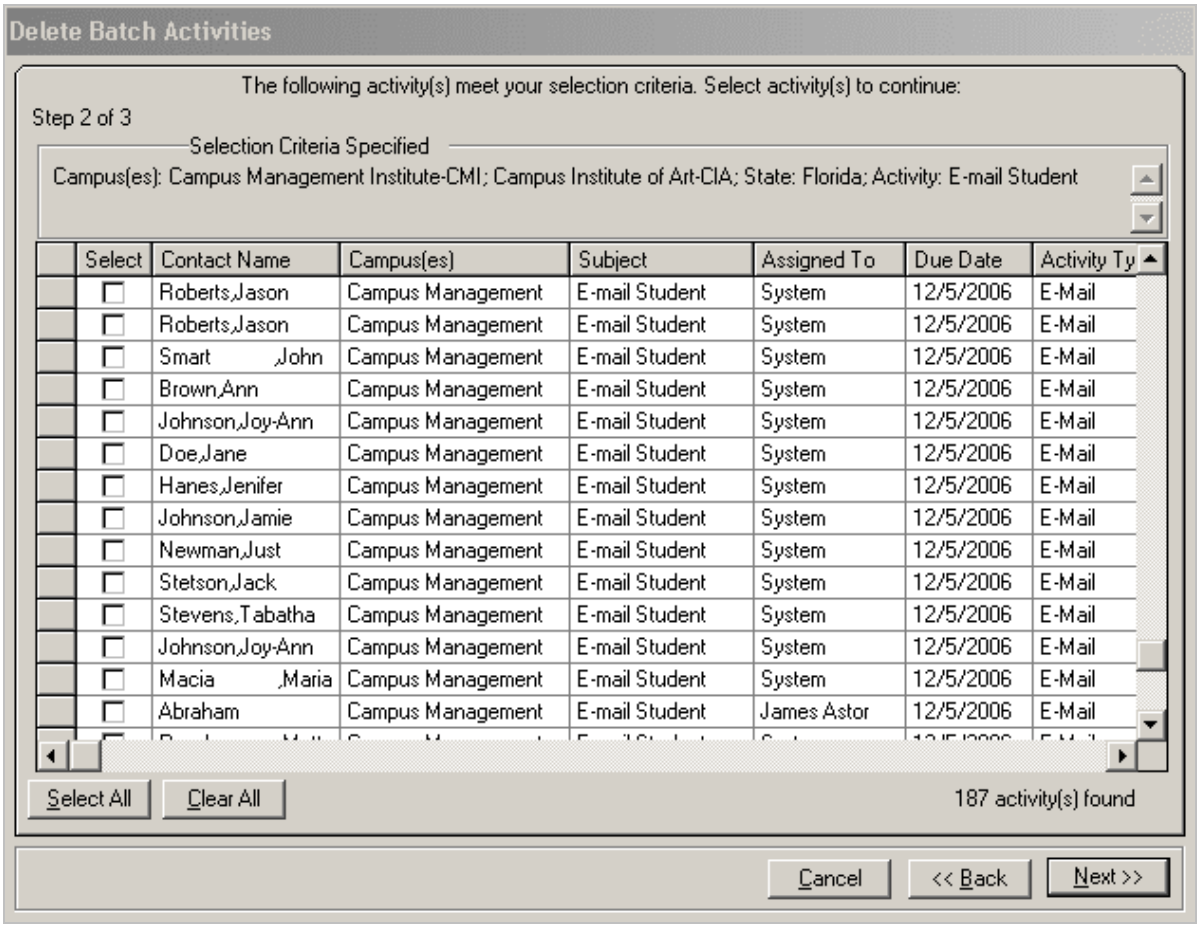
Note: Also refer to Modifying Batch Activities.

To delete activities in a batch mode:

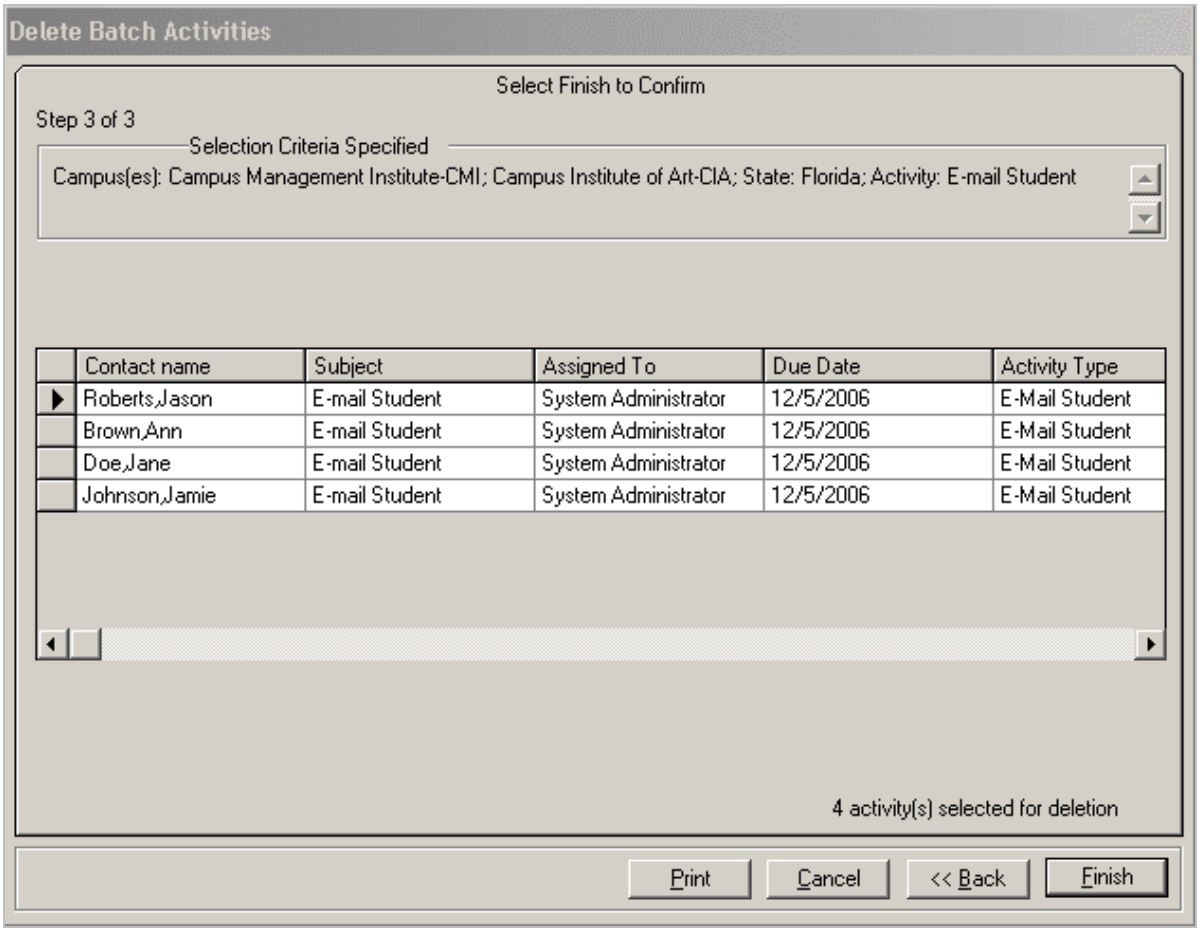
1. Navigate to **Tools > Contact Manager > Delete Batch Activities**. The Delete Batch Activities wizard is displayed.
2. Select applicable options from Step 1 and click **Next**.



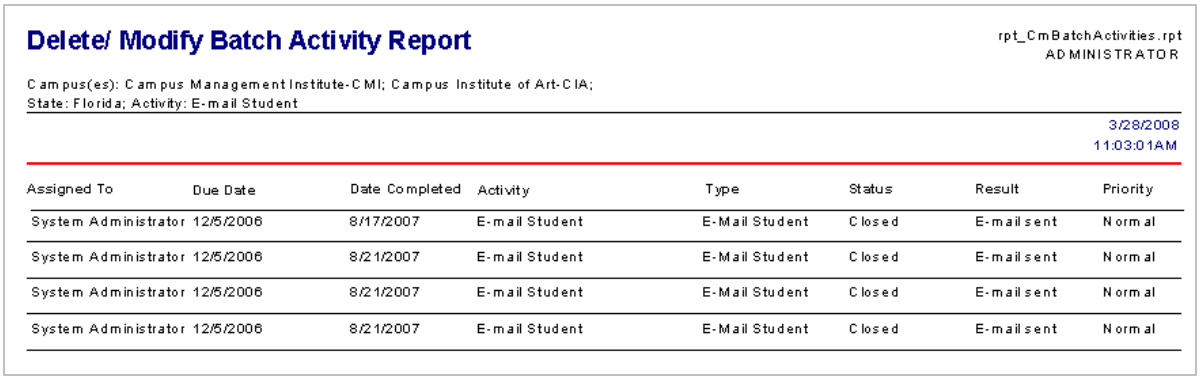
3. Select applicable options from Step 2 and click **Next**.



4. Review your selections in Step 3.



5. Click **Print** to view or print the Delete/Modify Batch Activity Report.



Note: If you click Finish without printing the report, a warning message is displayed stating that the selected activities will be permanently deleted from the database. Click **Yes** to continue deleting the selected activities without printing a report, or **No** to return to the previous form.

6. Click **Finish**. A confirmation message is displayed. Click **OK**.

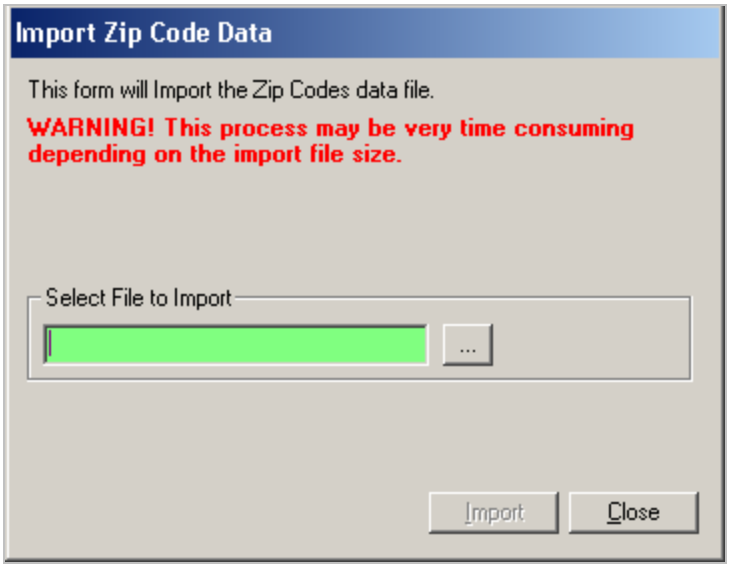
Import ZIP Code Data

CampusNexus Student provides a tool to import ZIP code data from a database file.

Note: Anthology Inc. purchased a ZIP code file from a company called ZIP Code Download (http://www.zipcodedownload.com). This file is provided as part of the installation package. The file name is `USA-5-DI.MDB`. The file is located in your `C:\Program Files\CMC\C2000\CustomFiles` directory, or on your COM+ Server.

To import a ZIP code data file:

1. Navigate to **Tools** > **Contact Manager** > **Import ZIP Code Data**.



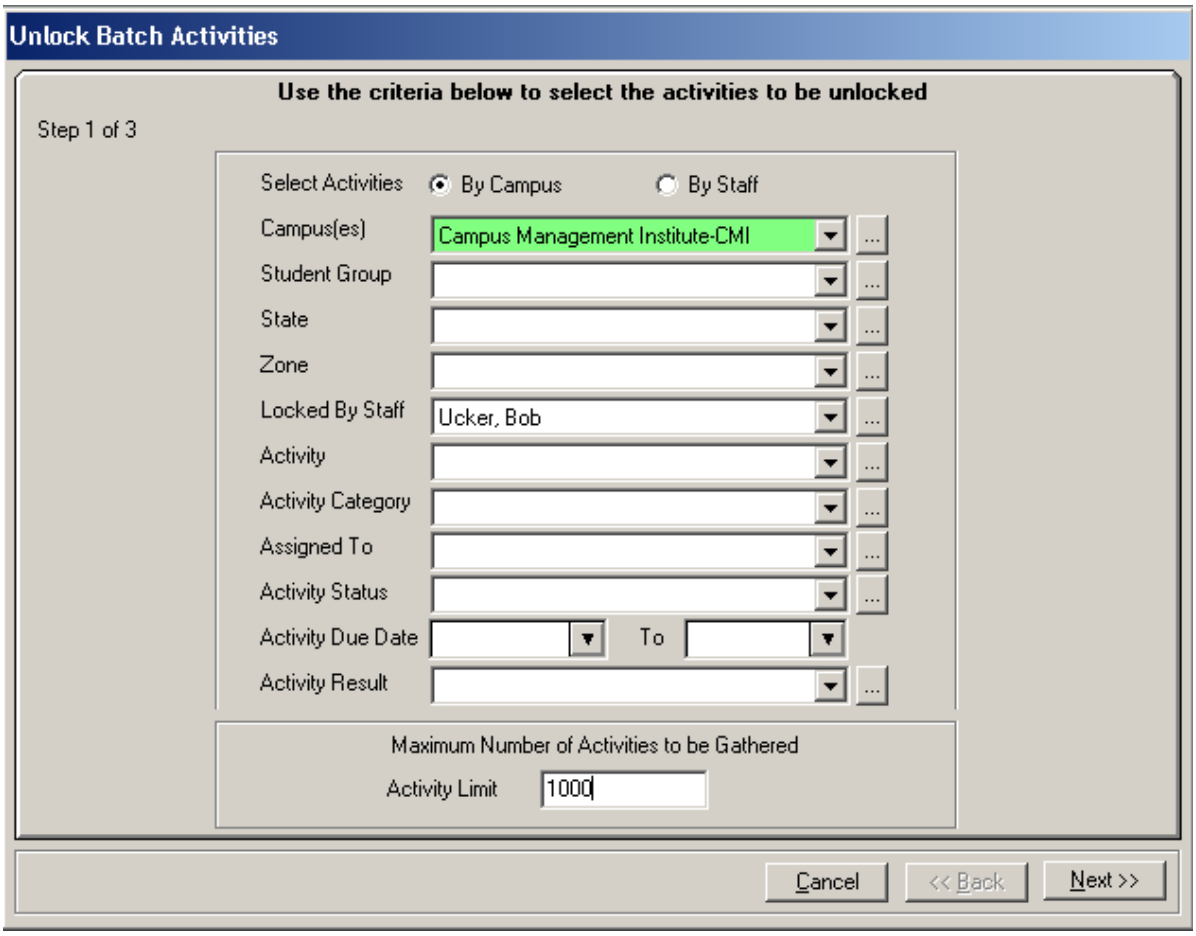
2. In the **Select File to Import** field, specify the path of the file location or click to navigate to the file.
3. Click **Import**. A message is displayed before importing the file stating that all data in the `SyZipCode` table will be deleted and the data from the new file will be inserted.
4. Click **Close** to close the form.

Unlocking Activities

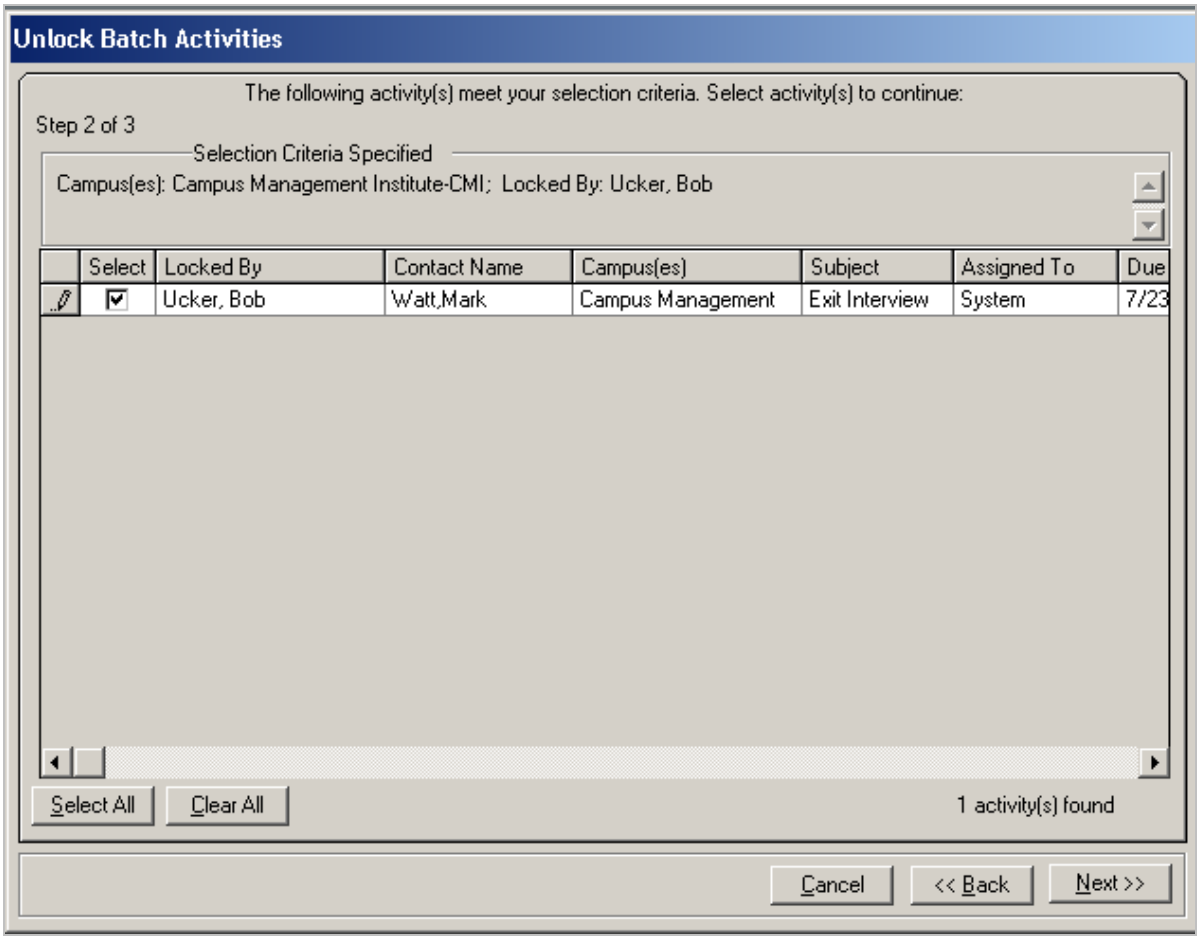
If CampusNexus Student unexpectedly terminates while users are viewing, editing, or closing an activity from the Contact Manager form, the activity is locked indefinitely until an SQL script is manually executed to unlock the activity or the following procedure is performed.

To unlock activities:

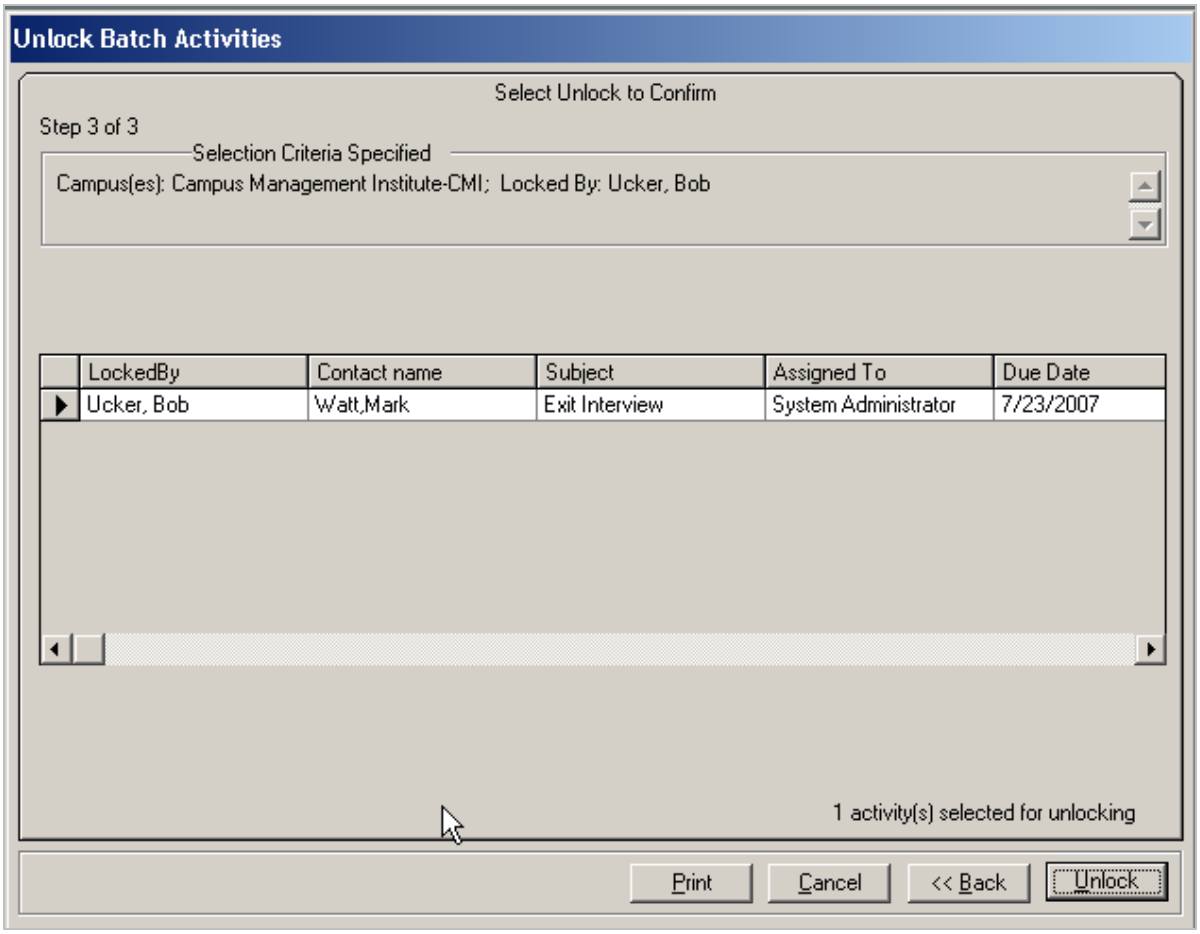
1. Navigate to **Tools > Contact Manager > Unlock Activities**. The Unlock Batch Activities wizard is displayed. The Campus(es) field shows the campus at which you are logged in.



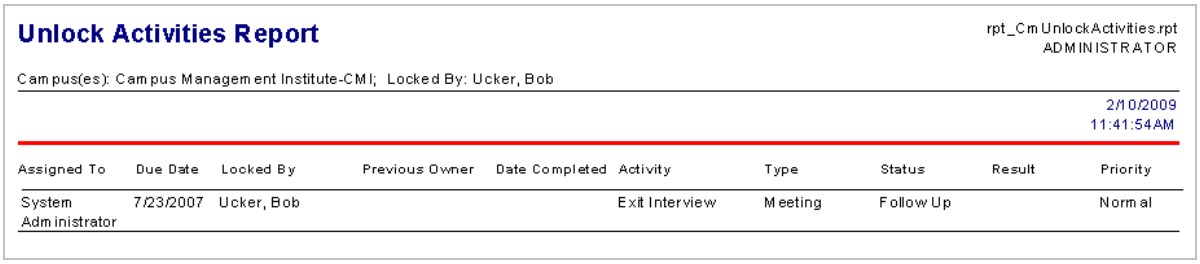
2. Select activities **By Campus** (default) or **By Staff**.
3. From the **Locked by Staff** list (or ... button), select the name of the staff member whose activity is locked, and click **Next**.
4. In Step 2 of the wizard, select appropriate activities and click **Next**.



5. Review your selections in Step 3.



6. Click **Print** to view or print the Unlock Activities Report.



Note: If you click **Unlock** without printing the report first, a warning message is displayed stating that the selected activities will be unlocked. Click **Yes** to continue unlocking the selected activities without printing a report, or click **No** to remain on Step 3 of the wizard.

7. Click **Unlock**. A confirmation message is displayed. Click **OK**.

Tools > Admissions

The Tool > Admissions submenu option is as follows:

- Test File Layout Entry

Test File Layout Entry

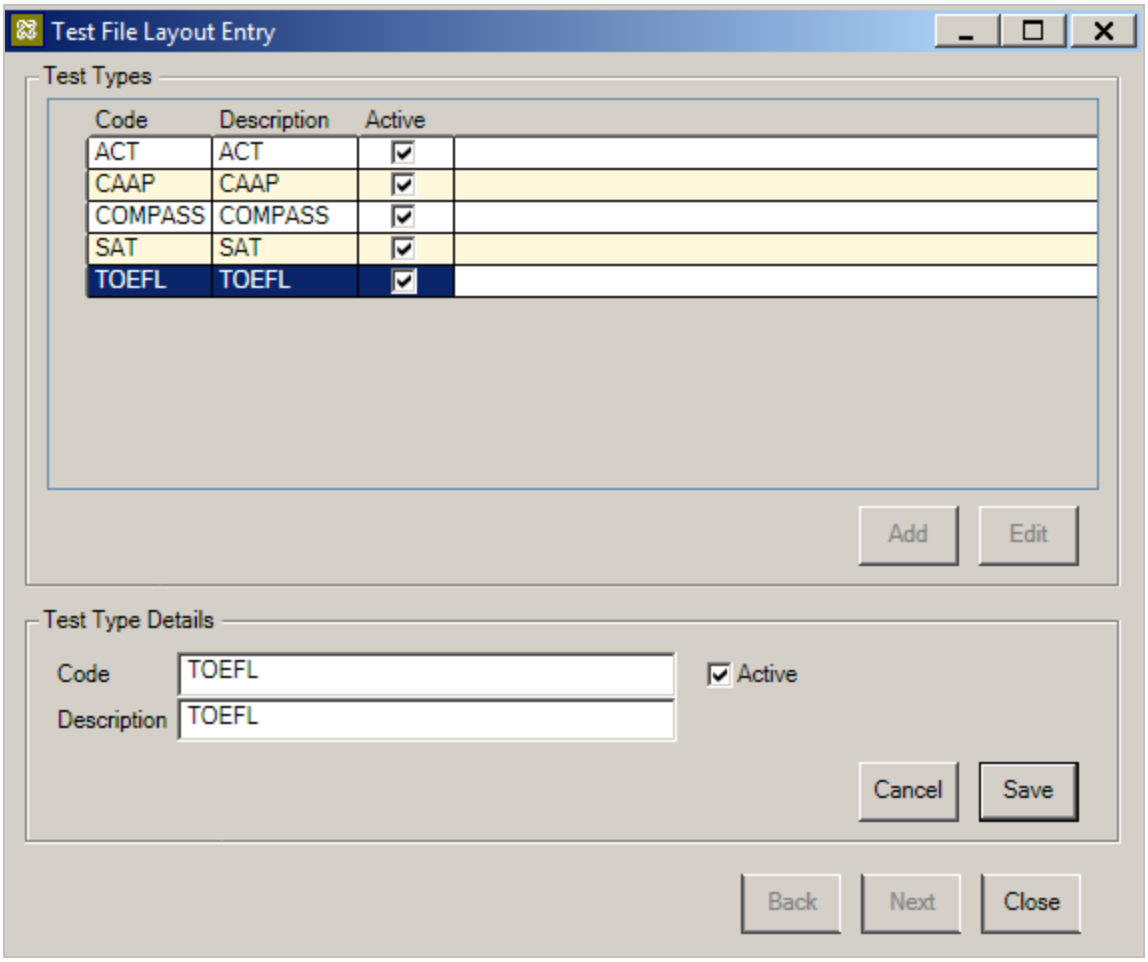
Use the Test File Layout Entry form to add file layouts for tests that need to have test scores imported into CampusNexus Student. You can also import test scores for additional tests, match the import results, conduct test mapping, and run the Entrance Test, Entrance Test Detail, and Entrance Test Batch Import Detail reports.

Note: Anthology Inc. no longer supports yearly updates for the admissions tests, including SAT, ACT, CAAP, COMPASS, and SAT to ACT conversion. Likewise, the ability to modify current file layouts for yearly updates is no longer supported. Institutions are now responsible for tracking changes to the tests and updating them in the CampusNexus Student database.

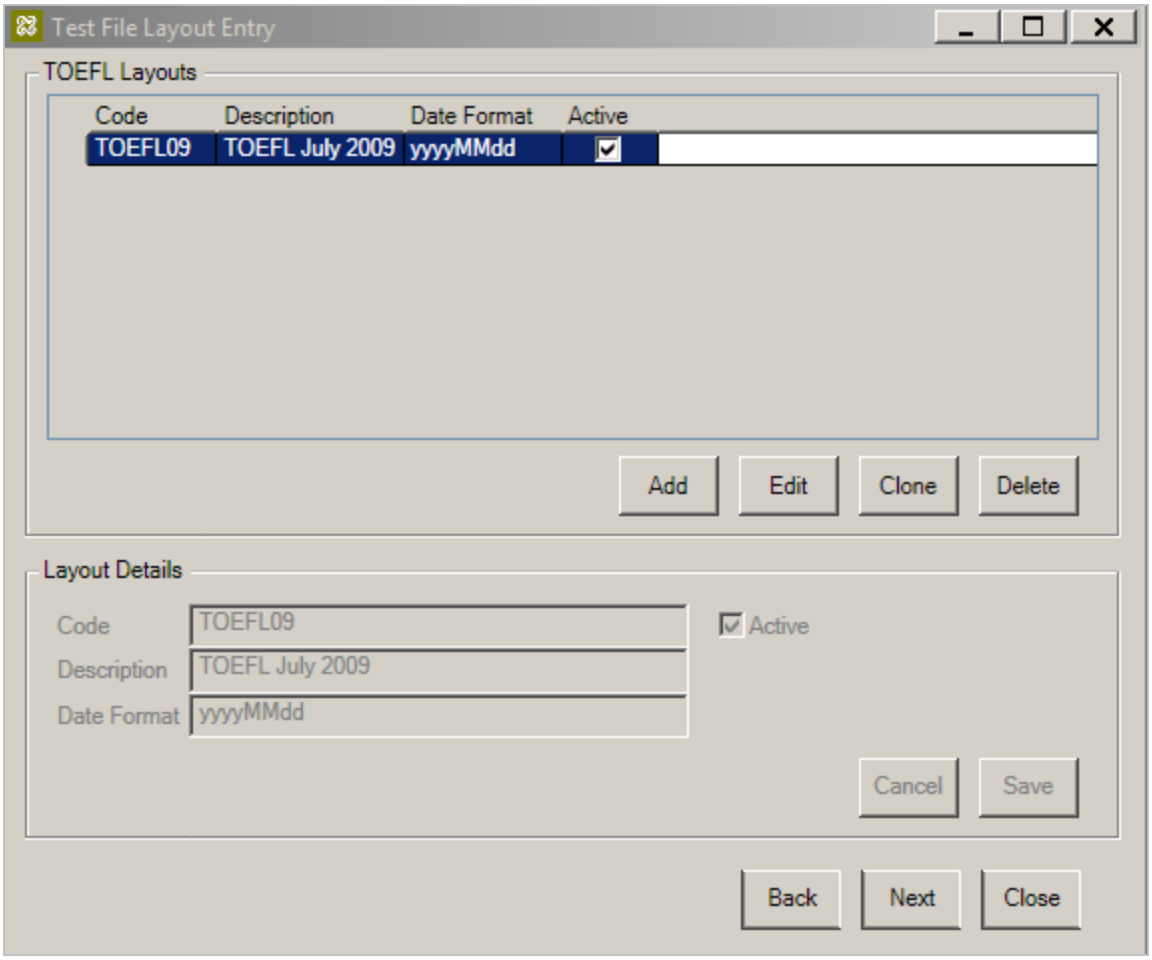
To add test file layouts:

1. Navigate to **Tools > Admissions > Test File Layout Entry**. The Test File Layout Entry form is displayed.

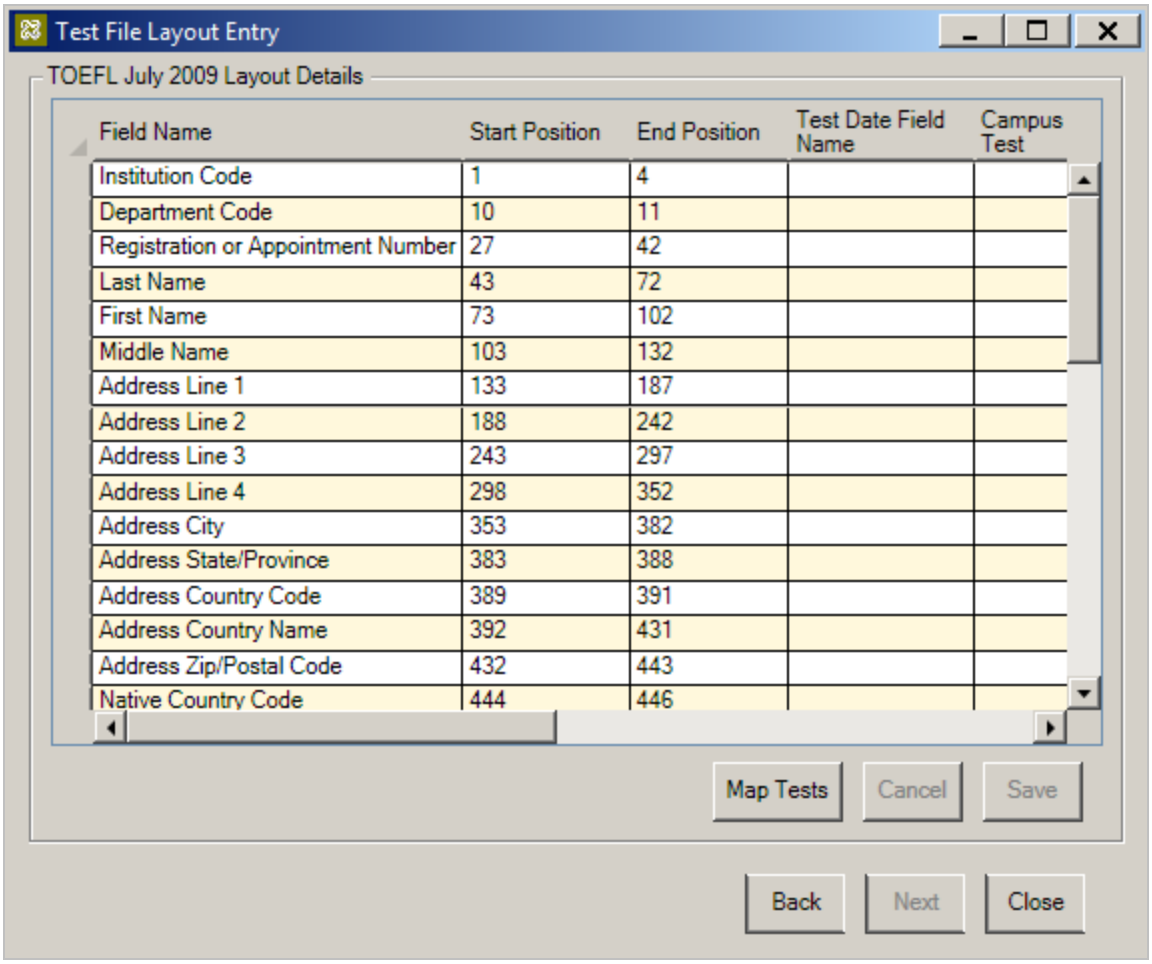
   You can add or edit a Test Type. If you add a test type, the Code for a new test type is capitalized and checked for uniqueness when you save it. The Code and Description fields are required and cannot contain spaces.



2. Select a **Test Type** and click **Next**. The Layout form for the selected Test Type is displayed. You can add, edit, clone, and delete the file layout of the Test Type.



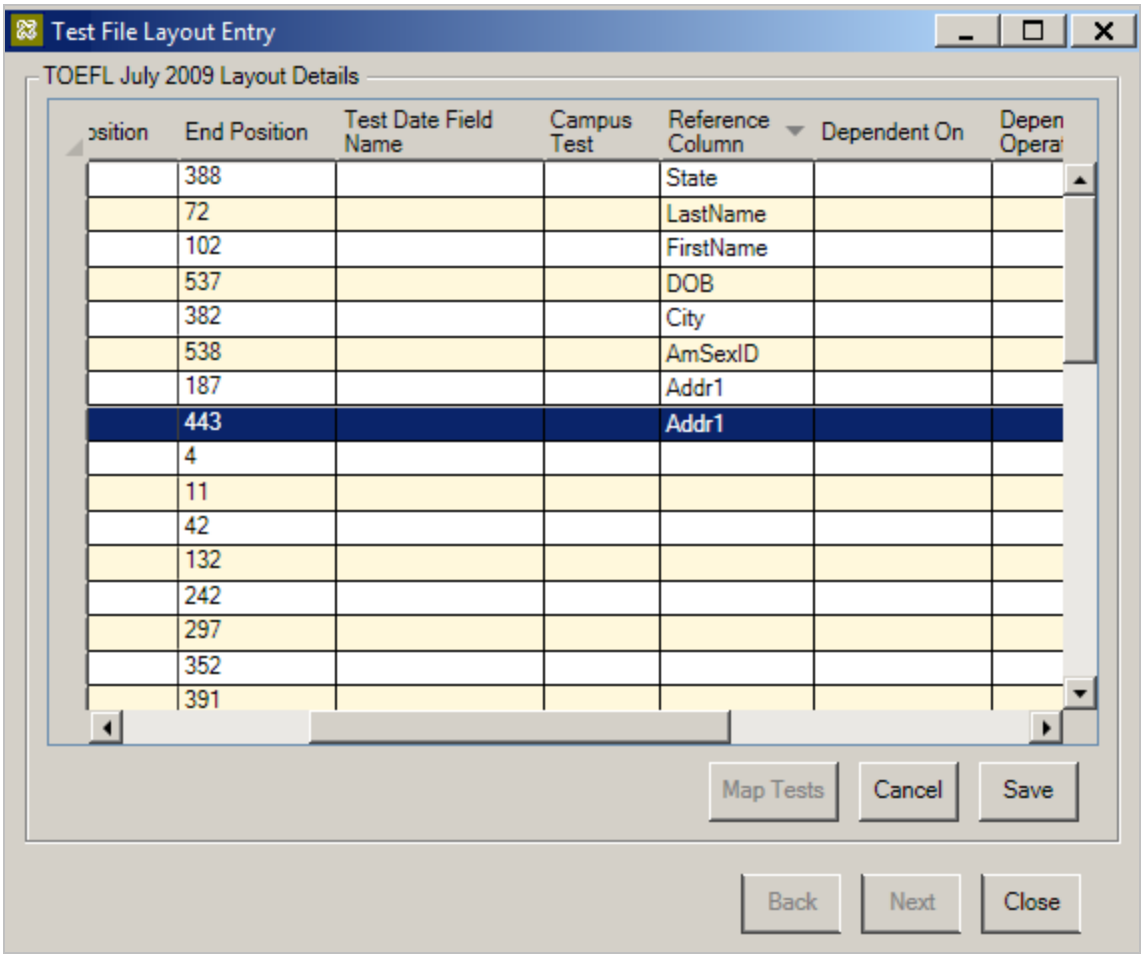
3. To clone a layout, click **Clone**. A confirmation message is displayed. Click **Yes**. Another message prompts you to enter the Code.
4. Specify the **Code** (max. 8 characters) for the cloned file layout and click **OK**. A message confirms that the file layout has been cloned, and you are returned to the Layout form. The file layout details are displayed in a grid.
5. Select a file layout from the grid and click **Next**. The Layout Details form is displayed. The Import Test Scores process uses the file layout details entered on this form to parse the test file while importing test scores into CampusNexus Student.



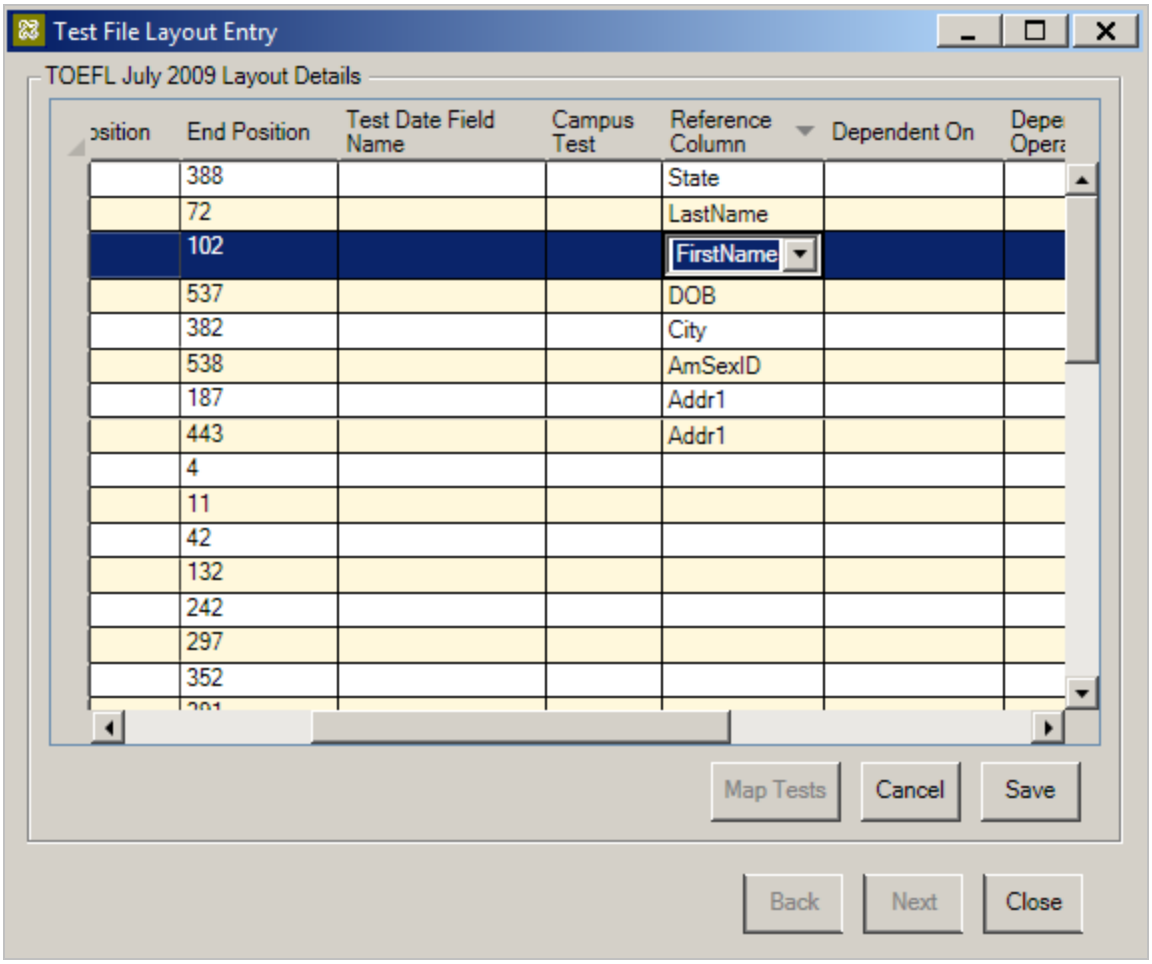
Notes about the layout details:

- The Reference Column consists of a drop-down list that appears when you click on the Reference Column header. The list is populated with the following fields:

  Addr1, AmSexID, City, DOB, Email, FirstName, HsGradDate, HsGradYear, LastName, MI, Phone, SSN, State, SyCountryID, Vet, and ZIP.



- You can designate a field as one of the above fields by clicking on the right side of the field in the grid to display the available selections. These fields are used by the Match Test Scores process when a new lead is created.



- A field can be designated as a College Code. The College Codes can be mapped to campuses.
    - If the College Code was previously mapped to a campus, that campus is used as the student's campus when creating a lead while importing tests.
    - If the College Code was not mapped to a campus, the default campus is used as the student's campus. Lead defaults can be configured at Setup > Admissions > Admissions Settings, Create Lead From Test = Yes
- A field can be designated as a conditional field, which means that how the value in this field is interpreted may depend on the value of the Dependent On column. The Dependent On column provides the following values:

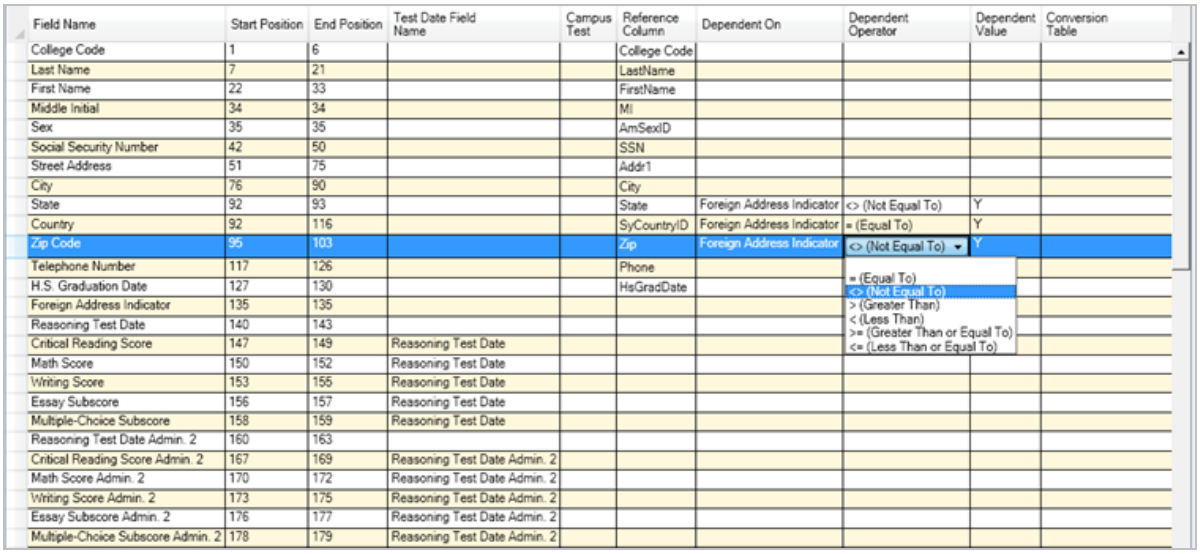
Depend On Column Values

Value	Description
=	Equal To
<	Less Than
<=	Less Than or Equal To

Value	Description
<>	Not Equal To
>	Greater Than
>=	Greater Than or Equal To

In the following example, the State, Country, and ZIP Code fields depend on the Foreign Address Indicator field.

- If the value extracted from the Foreign Address Indicator field is "equal to Y", positions 92 thru 116 are interpreted as the Country.
- If the value extracted from the Foreign Address Indicator field is "not equal to Y", positions 92 thru 93 are interpreted as the State, and positions 95 thru 103 are interpreted as the ZIP Code.



Field Name	Start Position	End Position	Test Date Field Name	Campus Test	Reference Column	Dependent On	Dependent Operator	Dependent Value	Conversion Table
College Code	1	6			College Code				
Last Name	7	21			LastName				
First Name	22	33			FirstName				
Middle Initial	34	34			MI				
Sex	35	35			AmSexID				
Social Security Number	42	50			SSN				
Street Address	51	75			Addr1				
City	76	90			City				
State	92	93			State	Foreign Address Indicator	<> (Not Equal To)	Y	
Country	92	116			SyCountryID	Foreign Address Indicator	= (Equal To)	Y	
Zip Code	95	103			Zip	Foreign Address Indicator	<> (Not Equal To)	Y	
Telephone Number	117	126			Phone				
H.S. Graduation Date	127	130			HsGradDate				
Foreign Address Indicator	135	135							
Reasoning Test Date	140	143							
Critical Reading Score	147	149	Reasoning Test Date						
Math Score	150	152	Reasoning Test Date						
Writing Score	153	155	Reasoning Test Date						
Essay Subscore	156	157	Reasoning Test Date						
Multiple-Choice Subscore	158	159	Reasoning Test Date						
Reasoning Test Date Admin. 2	160	163							
Critical Reading Score Admin. 2	167	169	Reasoning Test Date Admin. 2						
Math Score Admin. 2	170	172	Reasoning Test Date Admin. 2						
Writing Score Admin. 2	173	175	Reasoning Test Date Admin. 2						
Essay Subscore Admin. 2	176	177	Reasoning Test Date Admin. 2						
Multiple-Choice Subscore Admin. 2	178	179	Reasoning Test Date Admin. 2						

- The Conversion Table, Conversion From Column, and Conversion To Column columns allow conversion of a test score to an equivalent score. You can specify the Conversion Table to be used for the conversion, the From Column, and the To Column.

  The following ACT layout example specifies the SyACTtoSAT Conversion table as the Conversion Table to convert extracted ACT test scores to their equivalent SAT scores.

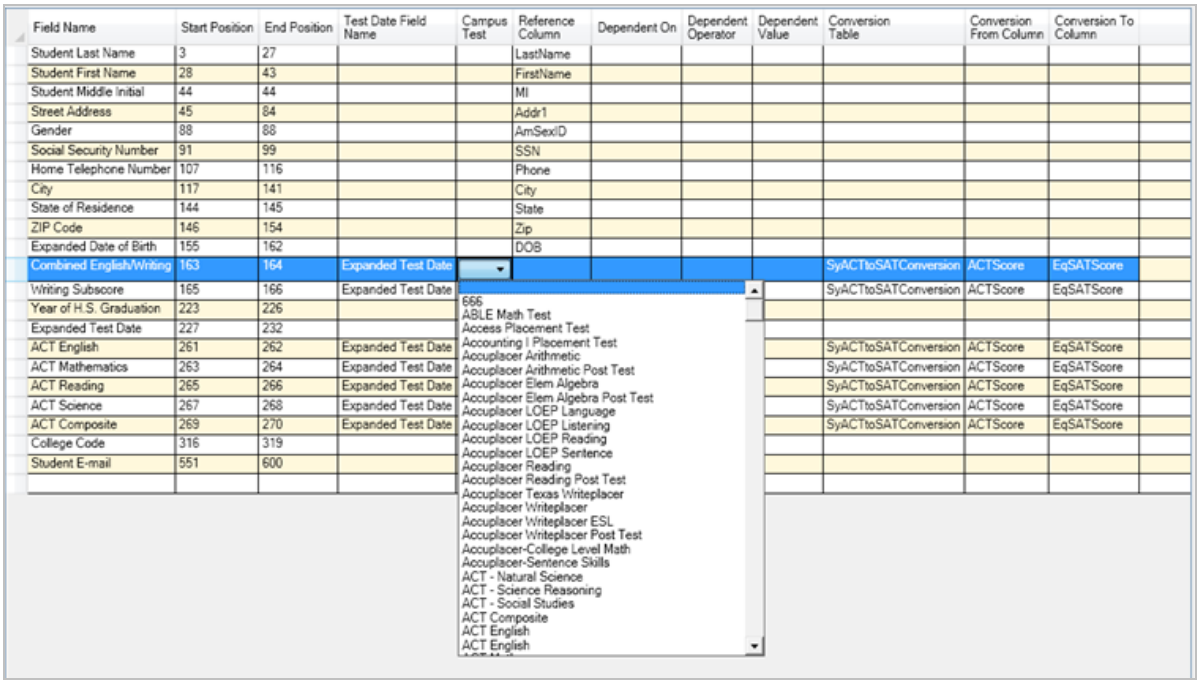
Field Name	Start Position	End Position	Test Date Field Name	Campus Test	Reference Column	Dependent On	Dependent Operator	Dependent Value	Conversion Table	Conversion From Column	Conversion To Column
Student Last Name	3	27			LastName						
Student First Name	28	43			FirstName						
Student Middle Initial	44	44			MI						
Street Address	45	84			Addr1						
Gender	88	88			AmSexID						
Social Security Number	91	99			SSN						
Home Telephone Number	107	116			Phone						
City	117	141			City						
State of Residence	144	145			State						
ZIP Code	146	154			Zip						
Expanded Date of Birth	155	162			DOB						
Combined English/Writing	163	164	Expanded Test Date						SyACTtoSATConversion	ACTScore	EqSATScore
Writing Subscore	165	166	Expanded Test Date						SyACTtoSATConversion	ACTScore	EqSATScore
Year of H.S. Graduation	223	226			HSGradYear						
Expanded Test Date	227	232									
ACT English	261	262	Expanded Test Date						SyACTtoSATConversion	ACTScore	EqSATScore
ACT Mathematics	263	264	Expanded Test Date						SyACTtoSATConversion	ACTScore	EqSATScore
ACT Reading	265	266	Expanded Test Date						SyACTtoSATConversion	ACTScore	EqSATScore
ACT Science	267	268	Expanded Test Date						SyACTtoSATConversion	ACTScore	EqSATScore
ACT Composite	269	270	Expanded Test Date						SyACTtoSATConversion	ACTScore	EqSATScore
College Code	316	319			College Code						
Student E-mail	551	600			email						

- The Campus Test list displays all active Campus Tests. A test can be mapped or unmapped. When the Map Tests button is clicked, all specified mappings are applied by inserting records or removing records for each active Campus. This provides the initial mapping of a test to a Campus Test. You can override this default mapping by navigating to Setup > Admissions > Test Mapping (tab) > Test Field and College Codes Configuration (button).

  This feature is intended to facilitate specifying default mapping of a new test; it is not intended for ACT, SAT, CAAP, or COMPASS.

  If the Campus Test column is left empty for a test and the Map Tests button is clicked, existing mappings are deleted.

  If the Campus Tests column for a test is empty in the Configure Tests form, it means that the Campus Test is not available for the selected campus. Go to Lists > Admissions > Tests, and edit a test to identify the campuses for which it is available.



6. Click **Save**.

   The following validations occur when Save is clicked:

   a. Field Name, Start Position, and End Position cannot be empty.

   b. Start Position and End Position must be numeric values greater than zero.

   c. End Position cannot be less than the corresponding Start Position.

   d. Field Name cannot be duplicated.

   e. Test Date Field Name must be defined as a Field Name.

   f. Dependent On must be defined as a Field Name.

   g. Test Date Field Name cannot reference itself.

   h. Dependent On cannot reference itself.

   i. When a Dependent On field is defined, corresponding Dependent Operator and Dependent values must be defined.

   j. Dependent Operator and Dependent Value can only be specified when Dependent On is specified.

   k. Conversion Table, Conversion From, and Conversion To are not required; however, if a value is entered, it cannot consist only of spaces.

   l. When Conversion Table is specified, Conversion From and Conversion To columns must also be defined.

   m. Conversion From and Conversion To columns can only be specified when Conversion Table is defined.

   n. Tests are the fields that have Test Date Field Name filled. They cannot have Reference Column specified.

   o. Only Test fields can have Conversion Table, Conversion From, and Conversion To columns specified.

   p. Only Test fields can be mapped to a Campus Test.

   q. Maximum lengths:

   Maximum Field Lengths

Field	Number of Characters
Field Name	200 characters
Test Date Field Name	200 characters
Dependent On field	200 characters
Dependent Value field	100 characters
Conversion Table field	100 characters
Conversion From Column field	100 characters
Conversion To Column field	100 characters
Start Position	6 digits

Field	Number of Characters
End Position	6 digits

Tools > Financial Aid

The Tools > Financial Aid submenu options are as follows:

- Manage COD Originations
- FISAP Data Correction
- Update Disbursement Information
- Fix Duplicate FaStudent Pell Records
- Link Payment to Scheduled Disbursements
- Update Award Information
- Student Pace Evaluation
- Gainful Employment Configuration (Refer to Help > Regulatory Help.)
- Education Level Setup (Refer to Help > Regulatory Help.)
- College Financing Plan Configuration (Refer to Help > Regulatory Help.)
- Multiple Disbursements

Manage COD Originations by Student

Use this tool to keep Origination changes made on the COD website synchronized with CampusNexus Student. Permission to use this tool by is set by selecting the Allow Override of COD Change Status field under Setup Menu > Staff > Staff Members > User Info Financial Aid Subtab.

You can override the following Originations:

For Pell, ACG, and SMART grants: Origination Process date, Origination Status, Pell Amount

For TEACH grants: Origination Process date, Origination Status, Pell Amount, ATS Status, ATS Link Indicator

For Direct Loans: Acknowledge date, Origination Status, PN Status, MPN Type, MPN Indicator, Plus Credit Decision Status, Loan Amount Requested

Notes:

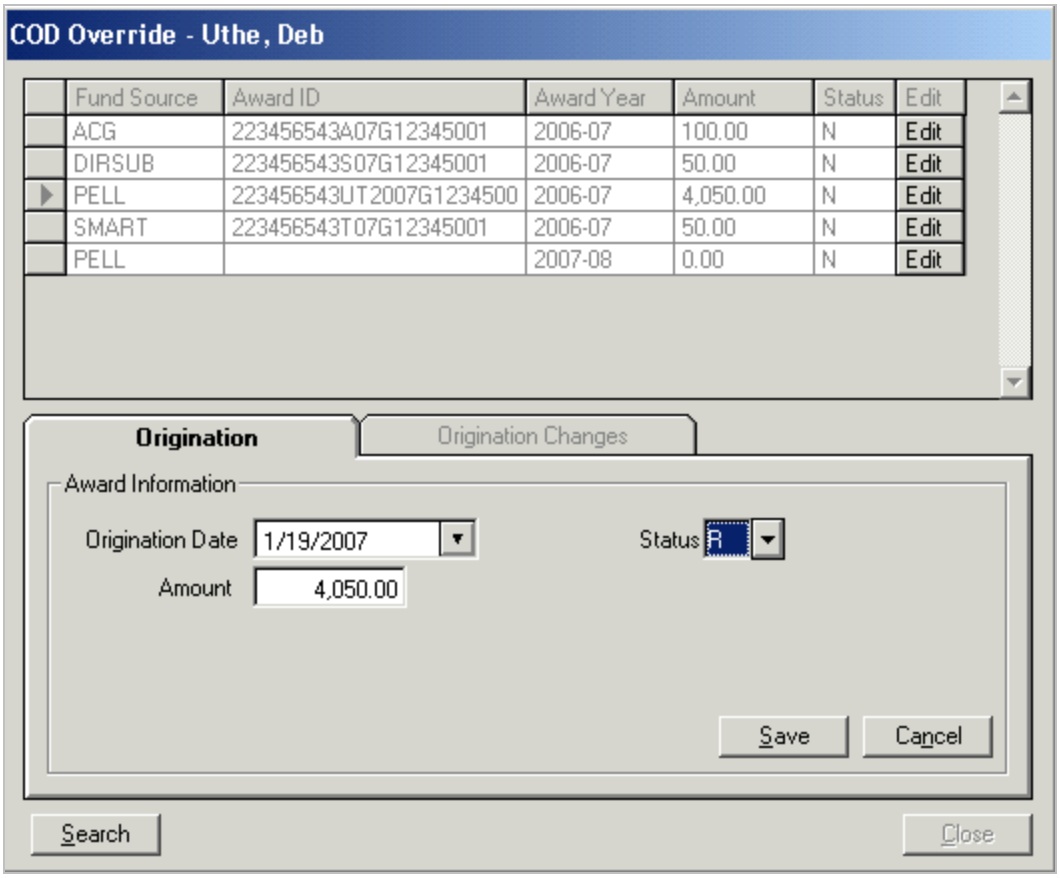
- When Automated Processes are enabled, for a Stafford loan disbursement to be exported, the MPN Link Indicator field should contain a value, that is, an MPN Response (CRNPXXOP) file is imported into the database.
- For a Direct PLUS loan disbursement to be exported, ensure the following:
    - The MPN Link Indicator is Y.
    - The Credit Decision Status value selected is A, E, or C.

To manage COD originations by student:

1. Navigate to **Tools > Financial Aid > Manage COD Originations by Student**. The COD Override form is displayed.
2. To search for a student, click **Search**, otherwise select the desired **Fund Source**, and click on the corresponding **Edit** button.
3. Depending on the selected found source, the Origination tab or the Origination Changes tab is enabled. The fields on the Origination tab vary depending on the selected fund source. Proceed with the steps for the Origination tab or the Origination Changes tab.

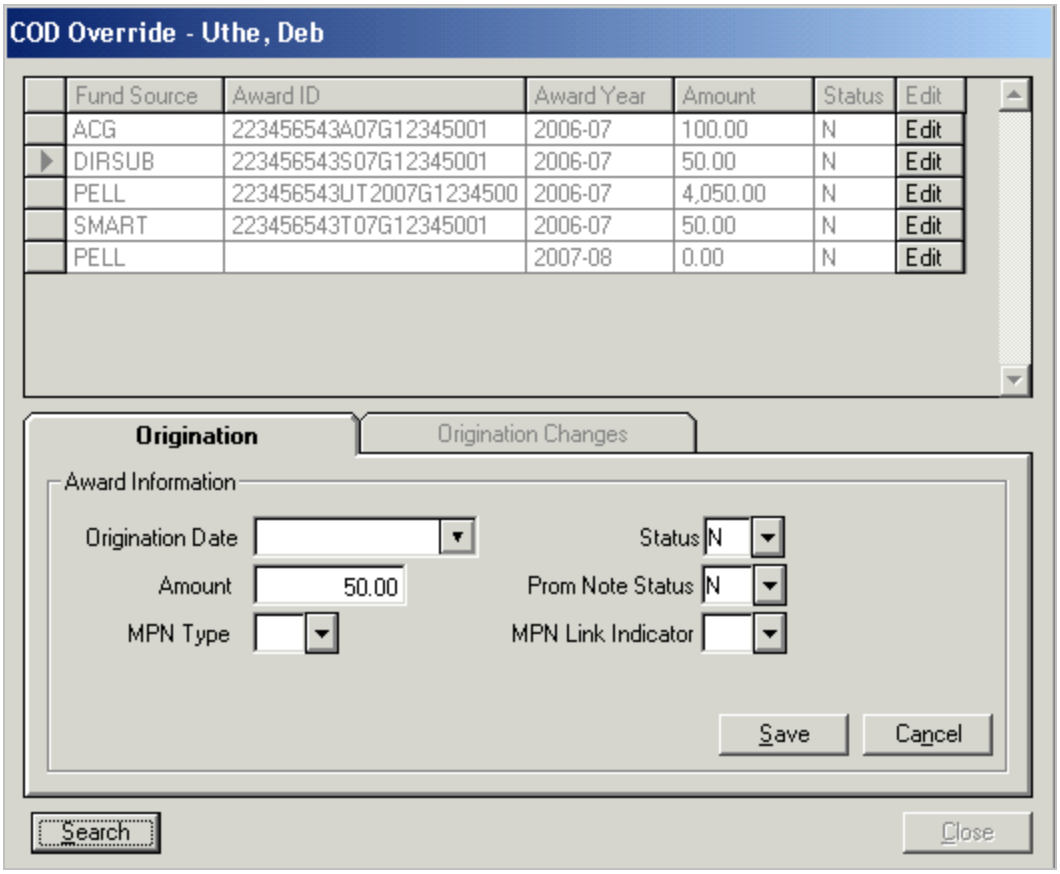
Origination Tab

Pell, ACG, SMART



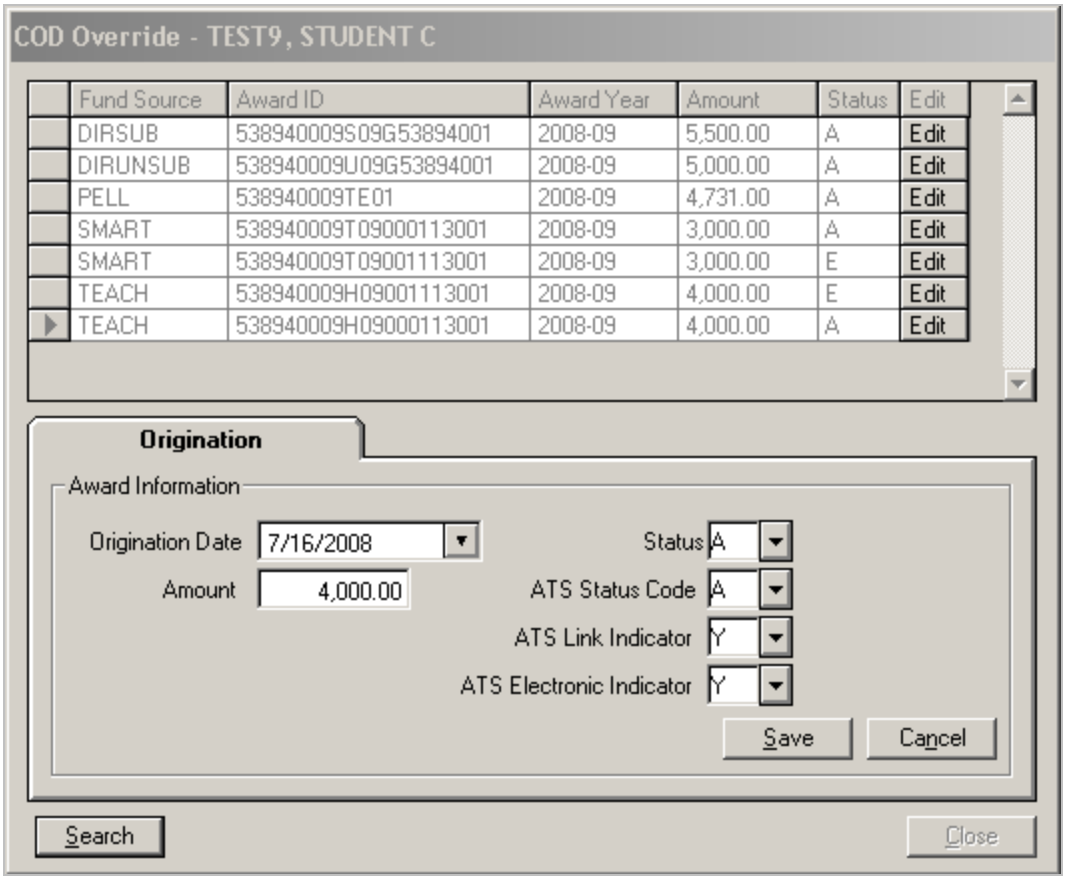
1. Select an **Origination Date**.
2. Select the applicable origination **Status**.
3. Specify an **Amount**.
4. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Direct Loan



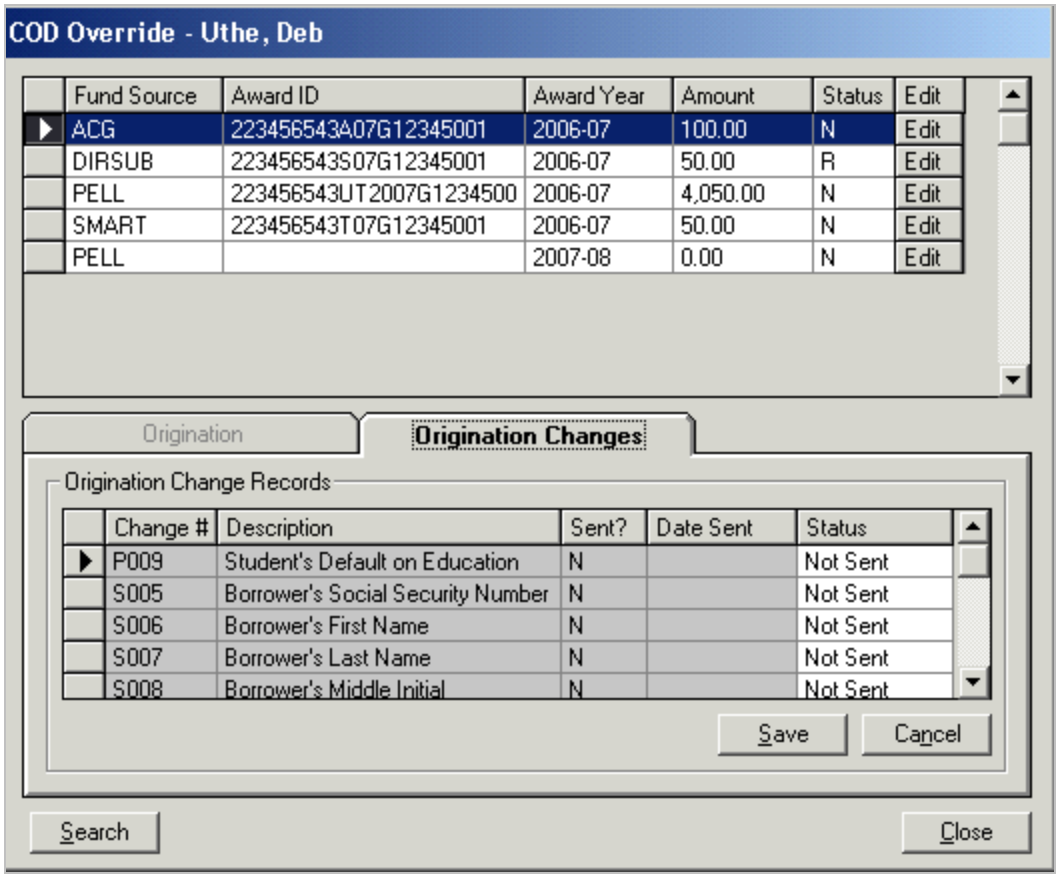
1. Select an **Origination Date**.
2. Select the applicable origination **Status**.
3. Specify an **Amount**.
4. Select a **Prom Note Status**.
5. Select an **MPN Type**.
6. Select an **MPN Link Indicator**.
7. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

TEACH



1. Select an **Origination Date**.
2. Select the applicable origination **Status**.
3. Specify an **Amount**.
4. Select the applicable **ATS Status Code**.
5. Select the applicable **ATS Link Indicator Code**.
6. Select the applicable **ATS Electronic Indicator Code**.
7. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Origination Changes Tab



1. Select an **Origination Change Record** from the list.
2. Click in the **Status** field of the selected record. A list of available options is displayed. Select the status to apply to the record.
3. Specify an **Amount**.
4. Select a **Prom Note Status**.
5. Select an **MPN Type**.
6. Select an **MPN Link Indicator**.
7. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

FISAP Data Correction

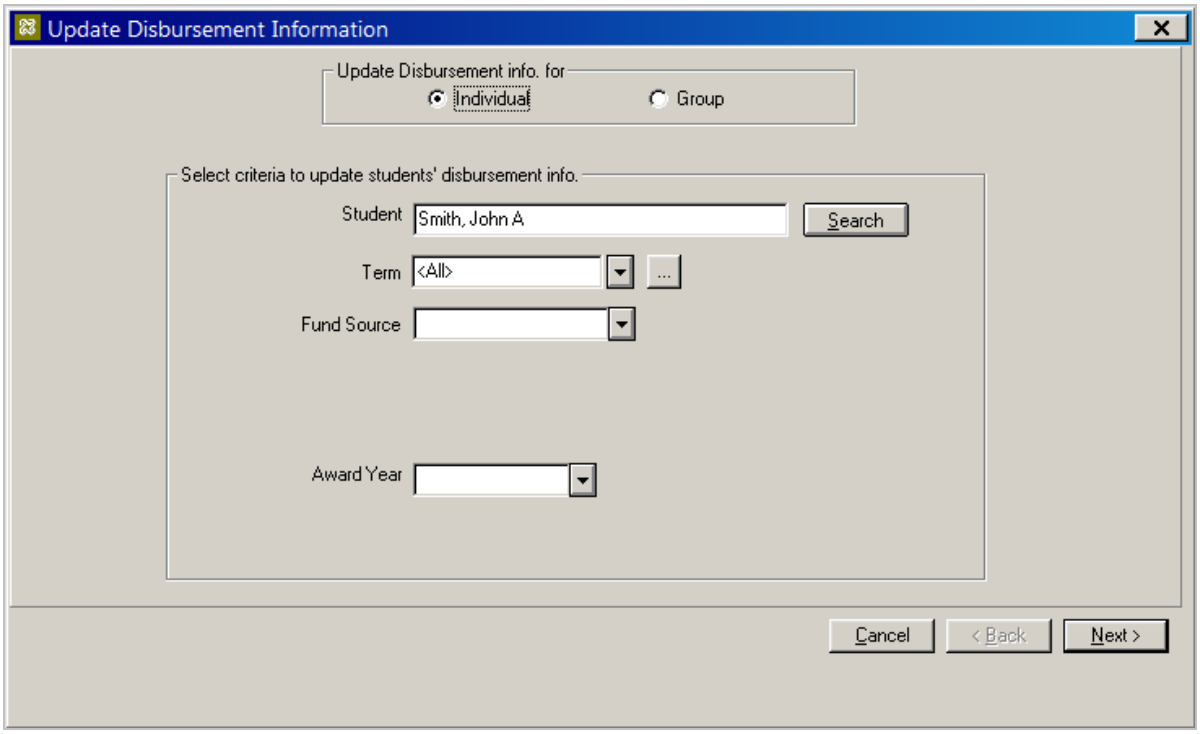
Note: Please access Regulatory Help for the latest content about FAFSA, ISIR, and COD processing.

Update Disbursement Information

When an institution changes a start date for a term, the Disbursement Schedule dates need to be adjusted so that disbursements are not paid out early. The Update Disbursement Information tool automates this adjustment.

To update disbursement information:

1. Navigate to **Tools > Financial Aid > Update Disbursement Information**. The Update Disbursement Information form is displayed.

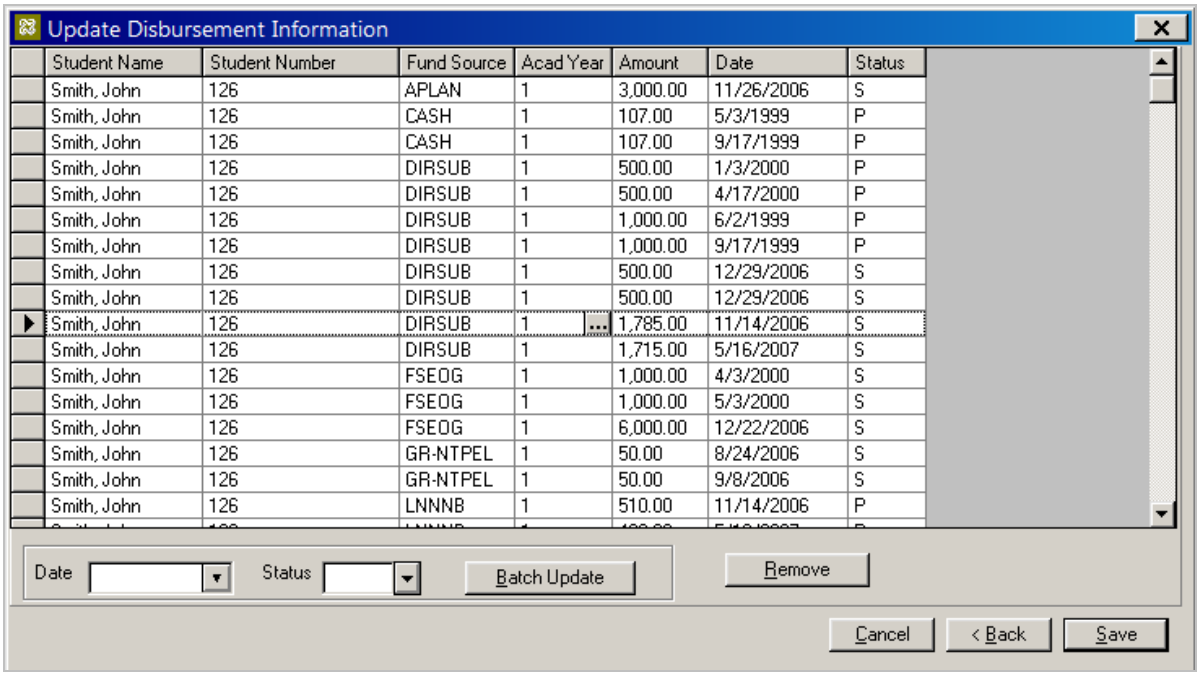


   - To update information for an individual, select **Individual** and enter the proper information in the **Student**, **Term**, **Fund Source**, and **Award Year** fields.
   - To update information for a group of students, select **Group** and enter the proper information in the **Term**, **Fund Source**, **Disbursement Batch ID**, **Campus**, **Award Year** fields. Select the **First Time Borrowers** check box to restrict the updates for first-time borrowers only.

2. Click **Next** to assemble the records affected. A grid displays the retrieved records.

   Note: To change the data in the grid, click on a column and select a value from drop-down list that is displayed after you click on the column.

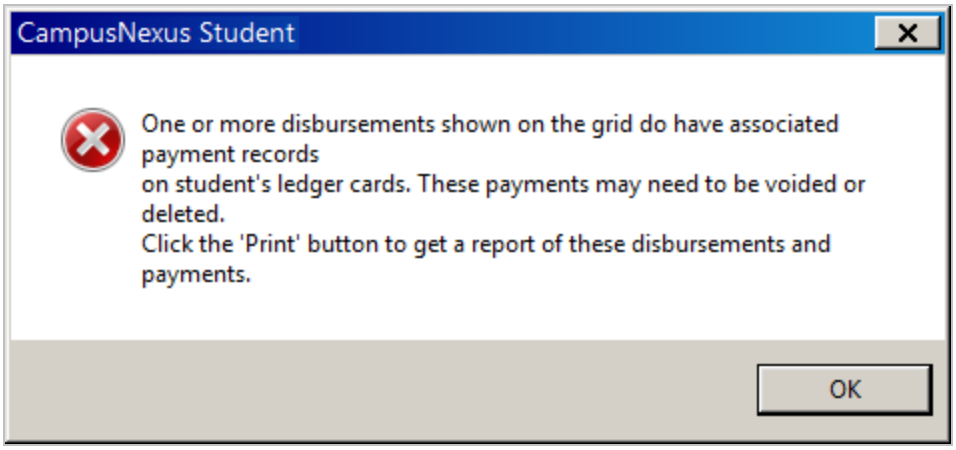
   When you change the disbursement date, Academic Year, Payment Period, or Loan Payment Period), the other columns are automatically updated. For example, if you change the disbursement date, the other columns are updated with appropriate values to encompass that disbursement date.



3. Specify the **Date** for the disbursement.
4. Select the disbursement **Status**. The options include:

    - **C** for cancelled
    - **R** for ready to pay
    - **P** for paid
    - **S** for scheduled

    Note: When you change a disbursement status from P to any other status (R, C or S) and a payment transaction exists for the disbursement record that you are changing, a message alerts you that one or more disbursements within this update have payment transactions associated with them. To see the list of disbursements with payment transactions, click **Print**.



5. To exclude a record from the update process, select the record and click **Remove**.

Note: CampusNexus Student validates the data to ensure that the corresponding disbursement received record is deleted, even when changing the status for a paid scheduled disbursement without a payment record. These types of disbursements usually result from data conversion.

6. Click **Batch Update**. CampusNexus Student updates all listed student's disbursements with the selected date and status information.

Fix Duplicate FaStudent Pell Records

Note: Please access Regulatory Help for the latest content about FAFSA, ISIR, and COD processing.

If a student has duplicate Pell (FaStudentPell) records, origination information to can be reported improperly. Use this tool to combine duplicate records into a single record based on the combination of SyStudentID, Award Year, and AttRFMSPellId for the selected campuses.

When you select a student, and an award year, CampusNexus Student displays all Pell records associated with the student for the award year. FaStudentPell records with blank award years are also displayed.

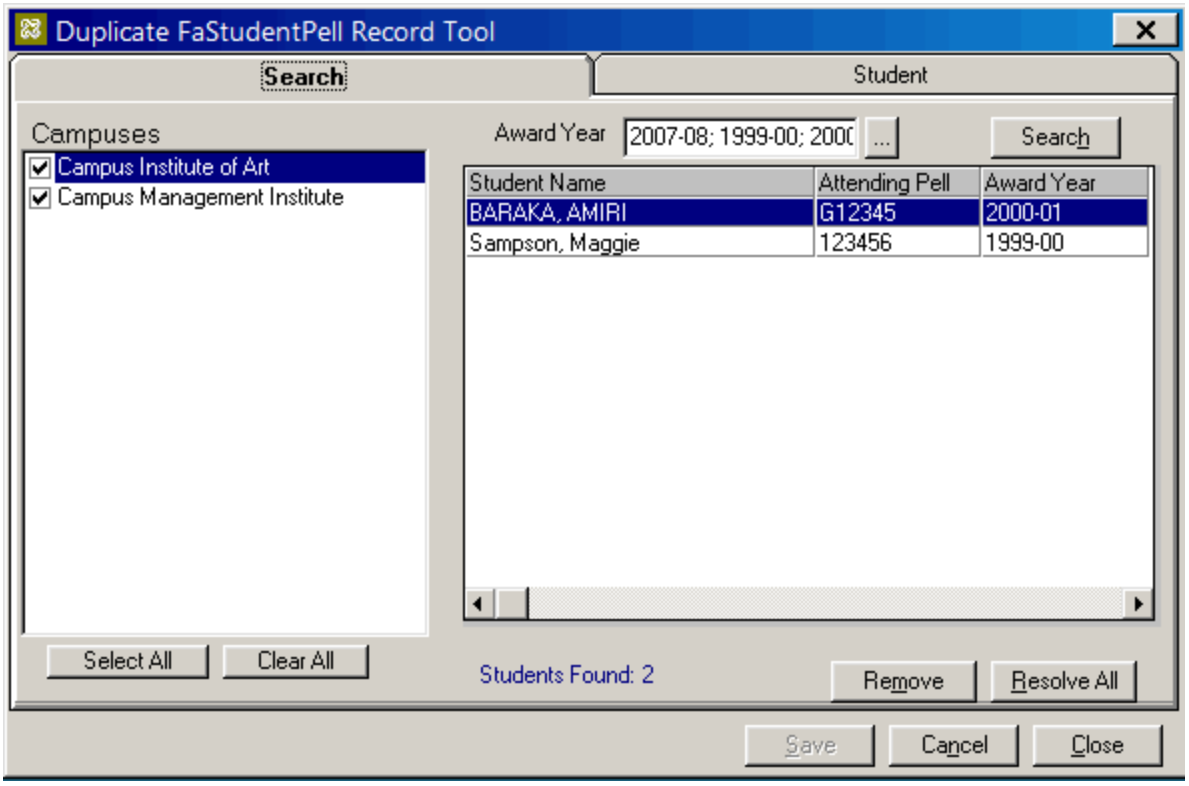
CampusNexus Student compares the values from the records and displays the fields containing different values. You determine which value to use in the resultant record.

This tool can merge the duplicate records into a single Pell record and delete the remaining record(s) from CampusNexus Student. You can cancel the process up until the Delete prompt.

See also FISAP Data Correction in Regulatory Help.

To fix a duplicate Pell record:

1. Navigate to **Tools > Financial Aid > Fix Duplicate Pell Records**. The Duplicate FaStudentPell Record Tool is displayed.



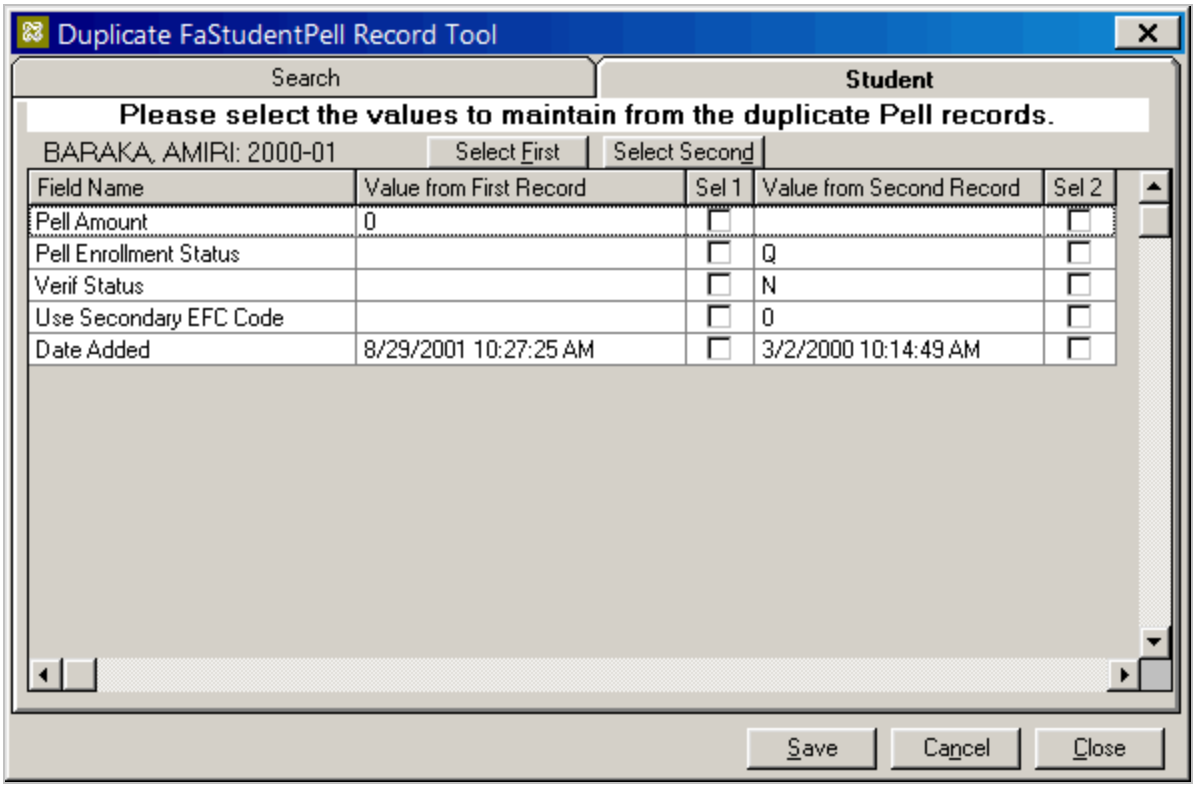
2. Select one or more **Campuses**.
3. Select an **Award Year**. To select more than one award year, click ... . All available award years are displayed. Select the award years to include in your search.
4. Click **Search**. CampusNexus Student retrieves all students that match your search criteria.

5. Select a student and click **Remove** to remove that student from your search results. To resolve Pell conflicts for all students, click **Resolve All**.

   Note: Up to three Pell records can be displayed in the grid.

6. If any Pell records are not exact duplicates, CampusNexus Student displays a message indicating the number of records that could not be resolved. Each of these records must be merged individually. Select the correct values and click **OK** to proceed.

7. Select a student and click the **Student** tab. The Student tab displays all conflicting data from duplicate Pell records. Fields with blank or null values are not displayed.



8. Select the values to keep from each record and merge the records into one, keeping only the correct data. You can select all values from one record or select values individually.

   a. To select all values from one record, click the **Select First** or **Select Second** button.

      - If you see only these two buttons, you can assume that there are only two Pell records for this student.
      - If you see a **Select Third** button, repeat the merge process to determine if there are more than three Pell records.

   b. To select individual values from each record, use the check boxes in the grid to select values associated with each field name.

9. Click **Save** to merge all data into one Pell record.

All other Pell records are deleted and CampusNexus Student updates all pertinent forms (ISIR, FAFSA, FaStudentAid, FaPellDisb and FaPellSpecialDisb) with the new Pell ID. If no conflicts are found, CampusNexus Student performs the merge.

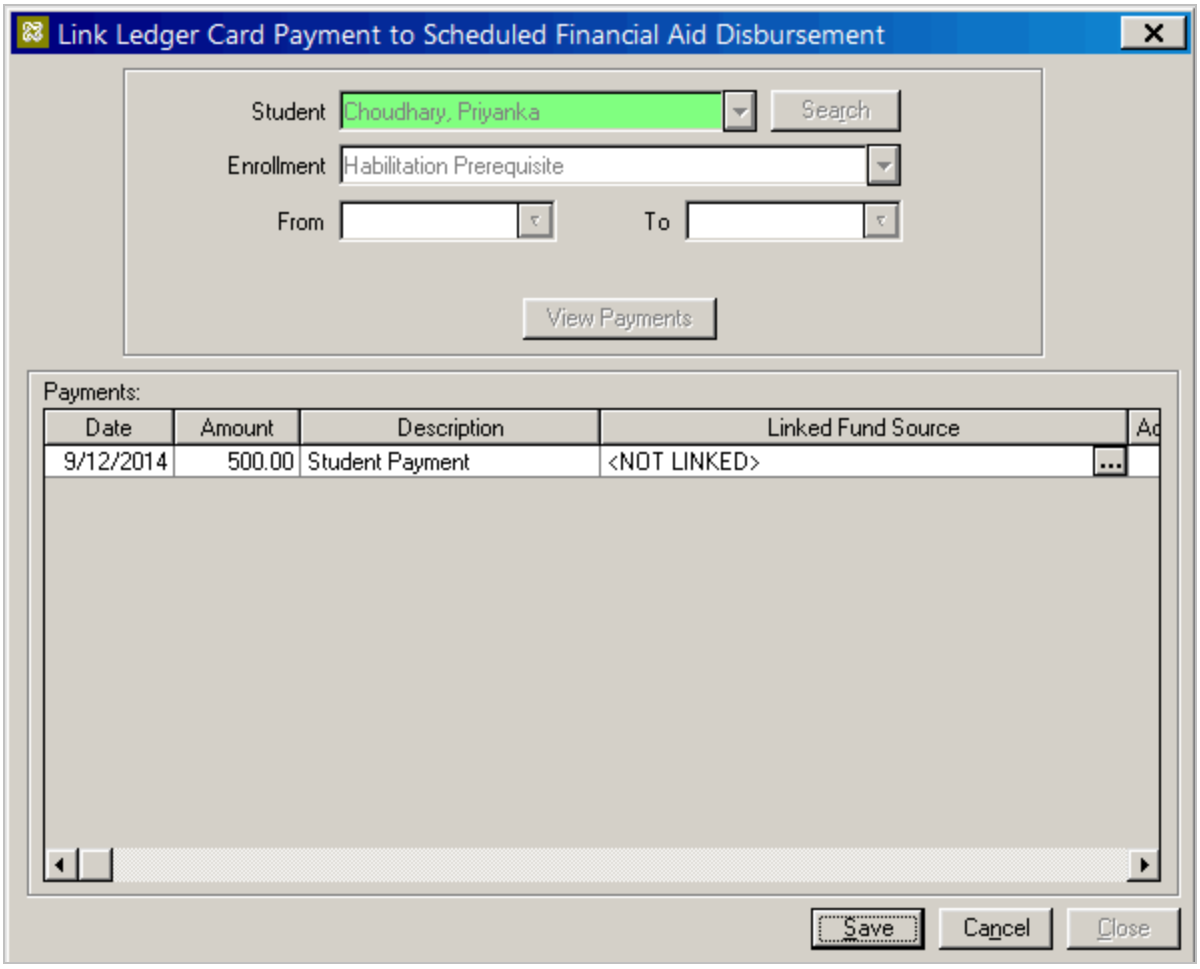
10. Click **Close** to close the form.

Link Payments to Scheduled Disbursements

Student ledger card payments are not always linked properly to financial aid packaging fund sources and scheduled disbursements. Institutions often discover this issue after conversion, when they try to reconcile fund source accounts or review past due and expected cash flow reports. This tool enables the authorized user to link an existing ledger card payment to a scheduled disbursement for a specific academic year.

To link a ledger card payment to a scheduled disbursement for an academic year:

1. Navigate to **Tools > Financial Aid > Link Ledger Card to Scheduled Financial Aid Disbursement**. The following form is displayed:



2. Click **Search** to find the student for whom you want to link payments.
3. Select an **Enrollment** for the student. This is not a required field. CampusNexus Student populates this field with the current enrollment for the student.
4. Select a **date range**.
5. Click **View Payments**. CampusNexus Student displays all unpaid scheduled disbursements for the academic year.
6. For records listed as <NOT LINKED>, click

... to see available options for the payment. Choose the payment to link with a disbursement.

7. Click **Save** to update the existing records and create any new records needed to complete the link between disbursement and payment.

   The transaction is linked properly to the disbursement and is apparent when viewing the ledger card transaction details, paid disbursements for the fund source, or running reports that include Financial Aid and Student Account information for the fund source.

   Note: CampusNexus Student ensures that a disbursement received record does not already exist.

   - If a record exists, pertinent information from the received disbursement record is updated. This avoids the creation of duplicate disbursement received records.
   - If a record does not exist, the process proceeds normally.

8. When the selected payment and disbursement have been linked, you can continue linking disbursements by changing selections as follows:

   - Same enrollment and a different date range
   - Different enrollment and date range
   - Different student

Update Award Information

CampusNexus Student provides an update tool to edit an award year within the packaging module instead of having to delete the award and set up another award with the correct award year. The award year cannot be modified for awards (Pell Grants, Direct Loans) that have been reported to the COD.

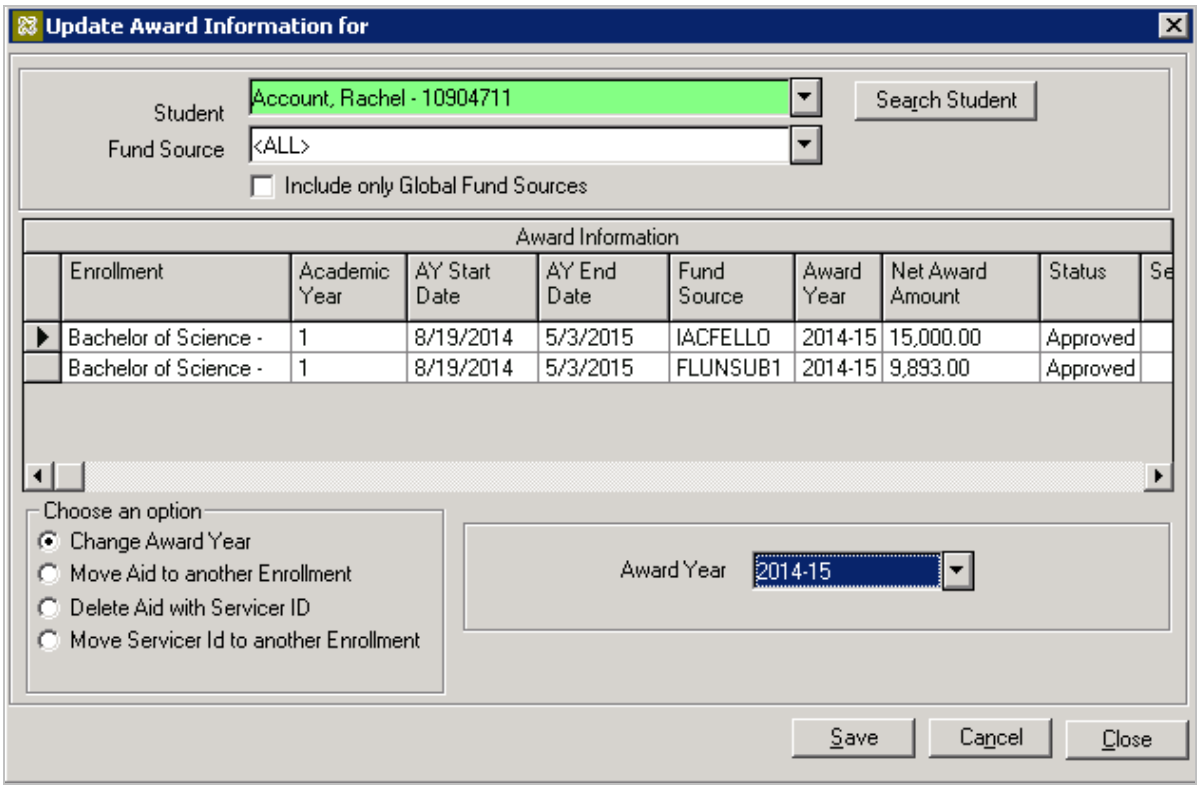
The Update Award tool can also be used to move aid from one enrollment to another, delete aid already associated with a Global Servicer ID, and move a Global Servicer ID from one enrollment to another.

This tool updates records one student at a time; however, it does not need to be closed and re-opened to update multiple student records.

> ⚠ Take extreme care when using this tool. Changes to awards can adversely affect a student's eligibility to receive aid. Erroneous reporting can lead to negative audit points and possibly affect your institution's eligibility to offer various types of aid to its students.

To update award information:

1. Navigate to **Tools > Financial Aid > Update Award Information**. The Update Award Information form is displayed.



2. Select a **Student** or click **Search Student** to find a student using the Search form.

   If you are already working with a student (student's name is displayed in the Recent Students window of your tool bar), CampusNexus Student loads that student's financial aid awards.

3. Select a **Fund Source**. The list includes all fund sources associated with this student.

4. Select or clear **Include only Global Fund Sources**. If selected, the grid displays only those fund sources that

have a servicer ID associated with each financial aid award.

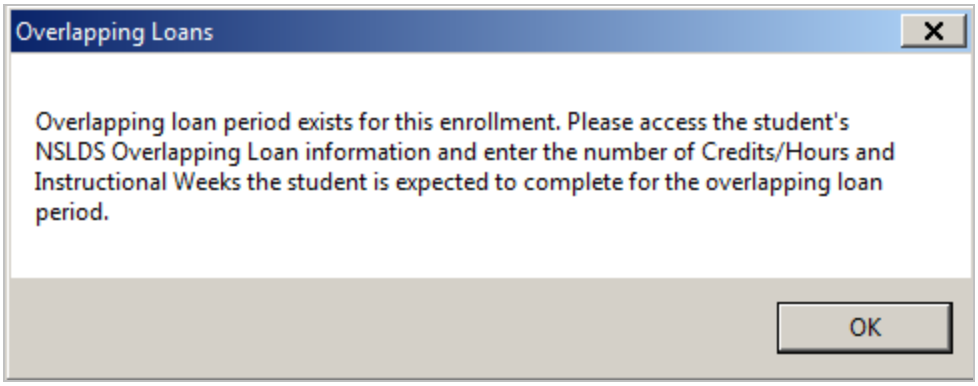
5. Choose one of the following options:

   - **Change Award Year**: Select an award in the grid and use the Award Year list to choose a year. Click **Save**
   - **Move Aid to Another Enrollment**: Select this option to apply an award to a different enrollment. If selected, CampusNexus Student displays the Enrollment and Academic Year list box. Select the enrollment and academic year and click **Save**. This option is useful when working with students who have multiple enrollments.

     You can only move title IV awards from a term-based program (Academic Calendar 1, 2, 3, and 4) to another term-based program. Additionally, you can only move title IV awards from a clock hour program (Academic Calendar 5) to another clock hour program, and move title IV awards from a non-term program (Academic Calendar 6) to another non-term program. CampusNexus Student displays a message indicating that an award cannot be moved due to Academic Calendar incompatibility between enrollments.

     When a direct loan is moved between clock hour and non-term programs, you can select the appropriate loan period to assign to the award being moved. You are prompted to create loan periods for the new enrollment if no loan periods are found.

     When you move a direct loan award to an enrollment that has an overlapping loan period and did not populate the fields "Overlap Period Credits/Hours" and "Overlap Period Weeks" for the enrollment in the “NSLDS Loans / Overlapping Loan Periods” tab of the NSLDS Previous Institute Details form, the message below is displayed. The "Overlap Period Credits/Hours" and "Overlap Period Weeks" are required to create loan periods to award direct loans for the overlapping loan period.

   - **Delete Aid**: If the award has an associated Global servicer ID, the award selected can be deleted. Click **Save**. This feature is available only to institutions using the Global financial aid servicer.
   - **Move Servicer ID to Another Enrollment**: If the selected award has an associated Global servicer ID, this ID can be moved and associated with another enrollment. If this option is selected, CampusNexus Student displays the Enrollment and Academic Year list box. Select the enrollment and academic year and click **Save**. This feature is available only to institutions using the Global financial aid servicer.

Student Pace Evaluation (SPE)

The Student Pace Evaluation tool evaluates a student's academic progress and determines whether the student's Financial Aid payment period and academic year dates, as well as expected graduation date or externship date, if applicable, need to be extended due to the lack of academic progress.

The Financial Aid and Housing sections tool are only applicable for students enrolled in non-term based programs that contain payment periods: programs configured with an academic calendar of Credit Hours without Term or Clock Hours.

To be gathered by this tool, a student must have a class scheduled. The tool uses the classes on a student's schedule to determine when the student will complete payment periods and academic years, and to set the graduation dates. If there are not enough classes scheduled, CampusNexus Student uses date add logic from the end date of the last class to calculate when the student will complete the expected number of credits to finish the payment period.

You can run the tool manually or schedule a job to run the tool automatically. When using the automated option, we recommend that you choose a time frame that does not interfere with daily operations.

Using the SPE tool, Financial Aid, Academic, Career Services, and Externship Advisors can do the following without having to first verify the accuracy of date information:

- Identify students who are ineligible to progress to the next payment period or academic year due to lack of academic progress.
- Extend students' payment period and academic year end dates when students are ineligible to progress to the next payment period.
- Correctly identify students who need exit interviews for financial aid.
- Prepare students for Externships.
- Prepare students for Career Searches.

The following assumptions apply:

- The academic year is defined for each program, including the credits/hours and weeks that make up a full academic year.
- The 'Total Credits for Externship' value defined for the Program Version includes the credits for any associated Externship.
- The Externship is taken after completing the classroom courses.
- The "Expected Hours per Week for Externship" will only be used in the graduation date calculation once the student is enrolled in an Externship course.
- A student cannot be registered into overlapping terms unless term sequencing is being used.

For more information on how CampusNexus Student analyzes and manages these program types, see Title IV Payment Periods. See also Graduation and Externship Date Calculations.

Only students in a program version that uses an Academic Calendar of Clock Hour, Credit Hours Without Terms, or Non-Standard Term populate information in the Academic Year, Payment Period, and Disbursement section. Students in standard term programs are only displayed in the enrollment section with projected graduation dates.

In the case where there is at least one class scheduled in the payment period(s), but there are not enough classes scheduled to complete a payment period, CampusNexus Student uses prorating logic to determine the end date of the payment period.

Note: If an updated FA Clock to Credit Conversion Rate (As of 7/1/2011) was added to the configuration, the SPE tool functionality that completes the Clock to Credit conversion, when needed, checks the enrollment date for the student and ensures the correct conversion rate is used to provide the proper adjustments to the dates on the Academic years for the student. This ensures that the proper progression is executed on the student.

If configured to do so, for non-term institutions (Academic Calendars 5 and 6), the Student Pace Evaluation tool can trigger the following automatic updates:

- The Origination Status of an originated Pell award is set from "Accepted" or "Batched to Send" to "Ready to Send" when the anticipated disbursement date of a Pell disbursement is updated by the Student Pace Evaluation tool. See COD Grants Setup.
- Origination change records are created when the Academic Year (AY) start/end dates, Loan Period (LP) start/end dates, or Disbursement dates are updated for a Direct Loan (DIRSUB, DIRUNSUB, and DIRPLUS) by the Student Pace Evaluation tool. See Direct Loan Setup.

Scheduled Complete Flag

For programs with credit or hour requirements, the SPE tool flags a payment period (PP) as “Scheduled Complete” in the database when enough courses are registered to complete the credits/hours of a PP. The SPE tool adjusts the final AY/LP for any extra credits/hours.

The Scheduled Complete flag is able to use courses in a scheduled, current, or completed status to determine if there are enough courses with credits that would potentially complete the payment period. If a course is completed, the grade posted must ‘earn the credits’ in order to utilize the credits or hours value of the course. The scheduled complete flag does not reference the IW milestone.

Complete Flag

The Complete flag is set when the system date is > than the IW milestone of a PP and there are enough credits/hours associated with grades that ‘earn the credits’ and/or meet the minimum grade points configured for the course requirement.

Applying the flags with ‘Disallow Rolling Credits’ disabled:

Academic Years:

In any payment period of an AY when ‘Disallow Rolling Credits’ is not enabled, the AYs progress at the rate defined in the FSA handbook. Therefore, Scheduled Complete/Complete flags for academic year PPs are set using cumulative counts (for the enrollment) of credits/hours for course work with an end date equal to or later than the SPE start date. No faster progression occurs with this setting.

Example:

For a 24-credit AY sequence utilizing 12 credit payment periods, CampusNexus Student would set the flags at 12, 24, 36, 48, etc., respectively. The PPs of the first AY sequence may contain 28 actual credits even though the AY only requires 24 (12 for each PP). The 4 extra credits and any extra weeks are counted toward completing the credit and weeks requirement of the next sequence.

Loan Periods:

The flags are applied using cumulative counts with in each loan period (LP). There is no carryover of extra credits/hours to the subsequent LP sequence.

Example:

For a 24 credit AY sequence utilizing 12 credit payment periods (PP), CampusNexus Student would set the flags at 12, 24|reset the counts| 12,24| reset the counts, etc., respectively. The PPs of the first LP sequence may contain 28 actual credits even though the LP only requires 24 (12 for each PP). The 4 extra credits and any extra weeks are not counted toward completing the credit and weeks requirement of the next sequence. Note that any extra credits/hours or weeks earned during the first PP of an LP sequence can carry over to the second PP of that sequence.

Applying the flags with ‘Disallow Rolling Credits’ enabled:

This setting allows the flags for AY PPs to mimic the logic used for LPs. The flags are applied using cumulative counts with in each loan period (AY). There is no carryover of extra credits/hours to the subsequent AY sequence.

Note that the AY/LP evaluation is triggered at the end of PP2 for each sequence to determine if there are any extra credits or hours earned during that sequence.

- When the Courses Exempt from Progression (CEFP) logic is enabled, courses flagged as 'Y' are used to determine the Scheduled Complete and Complete status. Clock hour programs use scheduled hours for current and scheduled courses and attended hours for completed courses.
- When the CEFP logic is disabled, current and scheduled courses always progress a student. If a course is completed, the SPE tool uses completed courses with a grade that earns the credits to determine the Scheduled Complete and Complete status. For hours-based programs, the attended course hours are used to determine the Scheduled Complete and Complete status. Scheduled hours are evaluated for scheduled and current courses.

During the final AY/LP, the Scheduled Complete flag can be set as a result of transfer credits being Approved. In this case, SPE reduces the duration of the final AY/LP and may attempt to remove a PP. If a PP cannot be removed, the AY/LP is not adjusted and a Contact Manager activity is created.

If PP2 has a disbursement, CampusNexus Student checks the setting of the 'Allow zero out extra AY/LP' option:

- If the option is selected, CampusNexus Student sets PP2 to zero (0).
- If the option is not selected, CampusNexus Student notifies you that the AY/LP could not be adjusted.

The Scheduled Complete flag is removed as a result of transfer credits being unapproved. In this case, SPE extends the final AY/LP.

The Scheduled Complete flag is not set or is removed on a student's AY and LPs when not enough courses are registered to complete the credits/hours requirement of that PP.

Title IV Eligibility

Payment periods that the student will not attend are flagged to indicate that the student is not eligible for Title IV funds during that payment period since the student will be unable to establish eligibility for Title IV funds.

The 'notEligibleforT4' flag is set to 1 for the following scenarios:

- A final non-zero credit payment period occurs with a credits milestone that is the same as a prior payment period (i.e., the student registered enough credits to complete the program version in the payment period prior to the final payment period). Use cases are AY/LP having 1 or 2 payment periods. Disallow rolling credits is disabled to create this data pattern for a final AY/LP with a single payment period.
- A zero credit payment period can occur when the flag to allow adjustment to 0 is enabled. See Allow zero out extra AY/LP under Setup > Campus Information > Financial Aid (tab). Extra payment periods that are unneeded, but cannot be removed due to constraints, are updated to have 0 credits/hours.

When the flag is set to 1, the Payment Period for Academic Year form displays the message: *"The system has calculated that the student will complete the program prior to this payment period. The student is not eligible for the TIV funds associated to this payment period."* For more information, see Payment Periods for Academic Year form.

You can configure an alert for a staff member when a payment period is flagged non-eligible for Title IV funds. For more information, see TIV Eligibility Alert under Setup > Campus Information > Financial Aid (tab).

Association between Courses and Payment Periods

For institutions that use the Student Pace Evaluator (SPE), CampusNexus Student can re-evaluate the association between registered courses and Payment Periods after the SPE has changed Payment Period dates so that courses are associated with the correct Payment Periods.

Re-association of courses and charges can occur in the following instances:

1. Registration and creation of pending charges in payment periods that will change after SPE executes.

- The registration of a course that has an end date in a future payment period and after SPE executes the credits for that course are needed to complete a more recent payment period. This change cascades through the subsequent payment period/course and charge associations.

2. Adjusting Payment periods due to dropped or failed courses.

- The actions (triggers) in this instance occur in a payment period and the payment period is extended to include a new course(s) and the associated charges for those courses. This change cascades through the subsequent payment period/course and charge associations.

3. Transfer Section

- This action can be performed at various times during the actions mentioned above.

4. Re-Entry > 180

- This process can create an overlap in AY/LP sequences and the associated payment periods. The PP sequences linked to an AY that starts prior to the Re-Entry > 180 date are no longer valid for associating with charges.

The logic for updating pending charges and ledger transactions should only be done for a configuration of the student's billing method that uses Payment Period Detail Billing and Revenue should only be updated if earning by transaction code over the course section.

Executing Student Pace Evaluation and Payment Period Billing Steps in Sequential Order Automatically

When the Student Pace Evaluation (SPE) job is used to update a student's academic progress along with payment period billing based on attendance, best practice is to run the following SQL jobs associated with the SPE and payment period billing in sequential order to ensure that the students are billed properly:

1. Autolock Payment Periods/Loan Periods
2. Recalculate the Graduation Date and Expected Externship Begin Date
3. Recalculate Payment Period Pending Charges
4. Process Payment Period Adjustments
5. Post Payment Period Pending Charges Based on Attendance

For institutions that do not want to manage these jobs individually, the SPE and Payment Period Billing job serves as a master job to run these jobs in the proper sequence. This master job checks if any of the individual jobs are enabled and disables them before running the corresponding steps within the master job.

Note: This master job is disabled by default, allowing institutions to decide when to replace their current job sequence.

Each step uses a SyRegistry key. Institutions can update the Registry keys to enable/disable certain steps.

SyRegistry Keys

	Step Name	Corresponding syRegistry Key Name
1	Autolock Payment Periods/Loan Periods_Step1	xxADFAExecuteAutoLockStep
2	Recalculate the Graduation Date and Expected Externship Begin Date_Step2a, 2b, 2c	xxADFAExecuteSPEStep
3	Recalculate Payment Period Pending Charges_Step3	xxSAExecuteRecalculatePPPendingChargesStep
4	Process Payment Period Adjustments_Step4	xxSAExecutePPAdjustmentsStep
5	Post Payment Period Pending Charges Based on Attendance_Step5	xxSAExecutePostPPPendingChargesStep

The master job default frequency is daily starting at midnight.

Prorating Logic

CampusNexus Student uses the following logic to determine the end date of the payment period.

1. First, calculate the number of days needed to complete the current courses (scheduled, current or complete) in the payment period. This is calculated by counting the number of days between the Payment Period start date and the end date of the last current course (add more days to factor in holidays as needed).
2. Calculate the number of credits/hours still needed to complete the payment period by subtracting the credits/hours of the current courses in the payment period from the total number of credits/hours required for the payment period.

The prorating is calculated as follows:

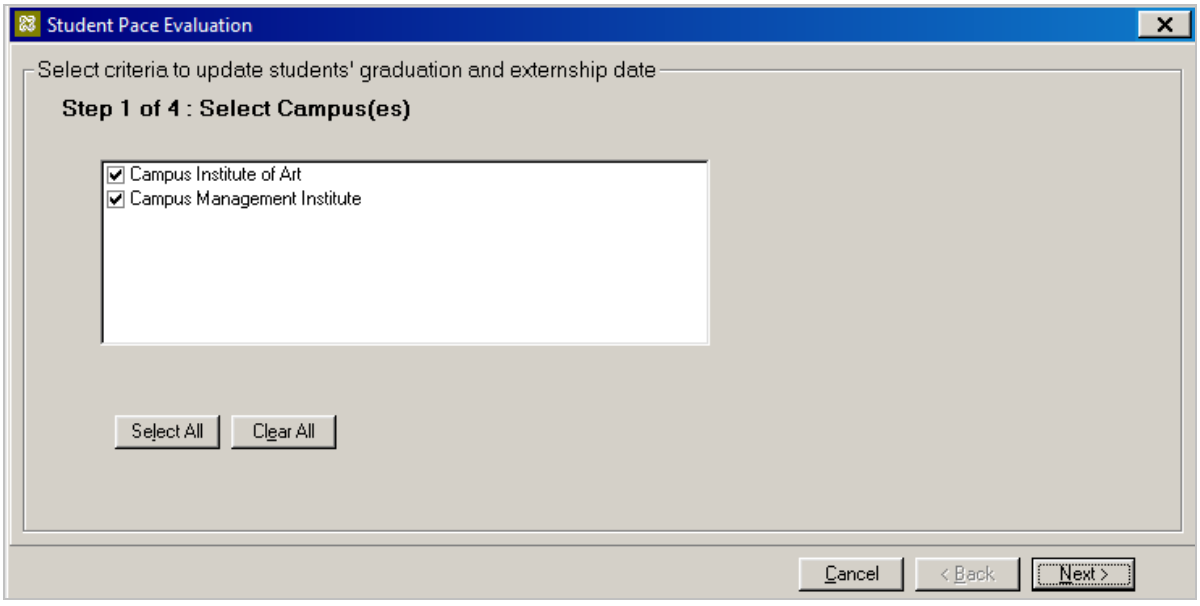
- Number of days to extend = (number of days calculated in Step 1 * number of credits/hours calculated in Step 2) / (number of credits/hours of current courses in the payment period)
- Add the number of days calculated previously to the end date of the latest current course (Scheduled, completed, current). The new date calculated is the end date of the current payment period.
- Add 1 day to this new end date, and this is the start date of the next payment period. The end date of this next payment period is calculated by using the start date and the number of weeks in the payment period. This process is repeated for subsequent payment periods.

Note 1: When a course overlaps non-term payment periods, i.e., the courses began in the first payment period and ended in the second payment period, weeks and credits associated with the overlapping courses are counted toward completion of the second payment period and the second payment period end dates are adjusted accordingly.

Note 2: When "Allow courses to be exempt from progression" is enabled, CampusNexus Student uses Instructional Weeks (IW) projection to determine both milestone dates on the payment period if there are not enough courses scheduled to complete the payment period. The exception to the rule is that if the IW milestone has been met; however, the hours or credits requirement has not, CampusNexus Student uses prorating to determine how long it will take the student to complete the requirement. Subsequent payment periods not covered by scheduled course work continue to use Instructional Week projection.

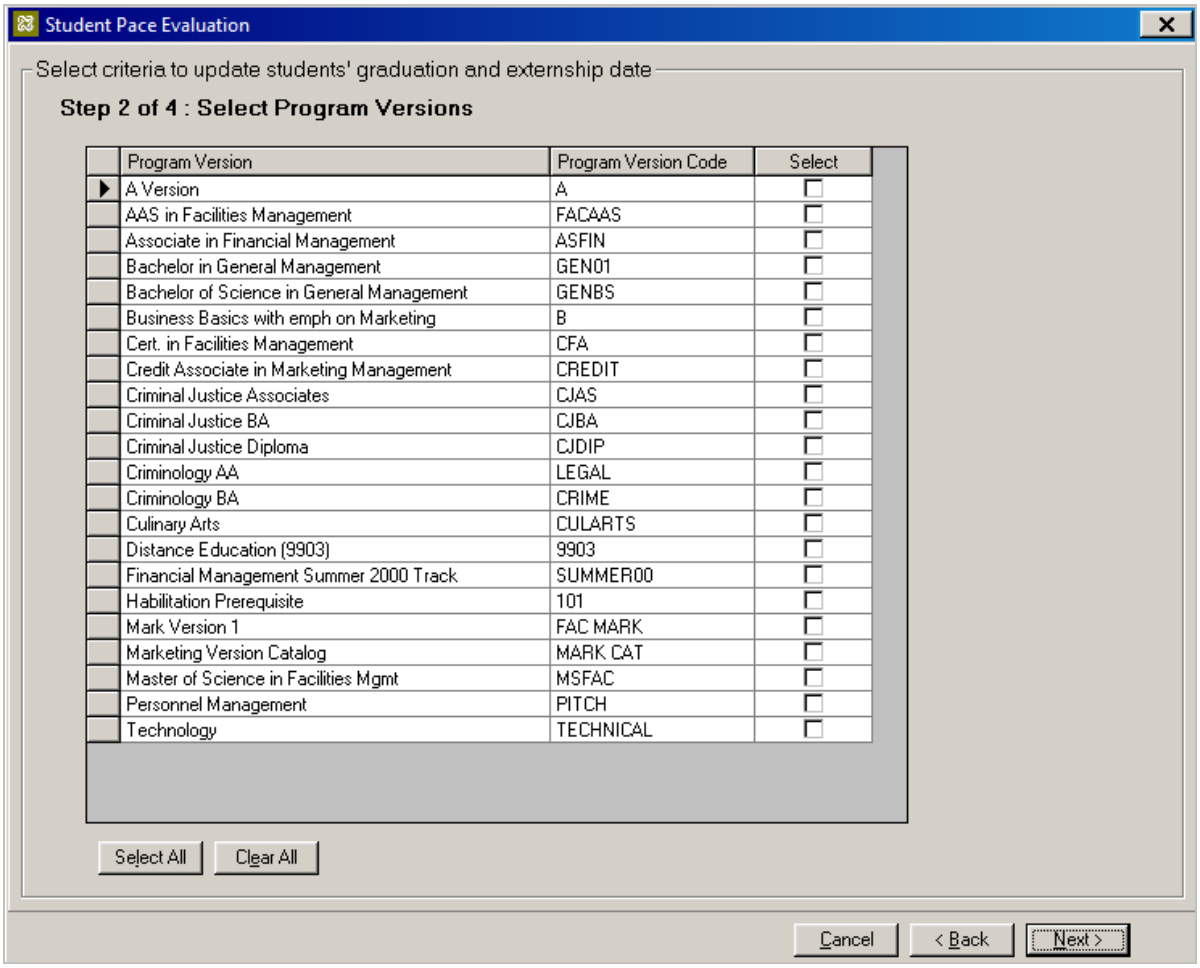
Updating Graduation and Externship Dates

1. Navigate to **Tools > Academic Records > Student Pace Evaluation**. Step 1 of 4: Select Campuses of the Student Pace Evaluation (SPE) tool is displayed.



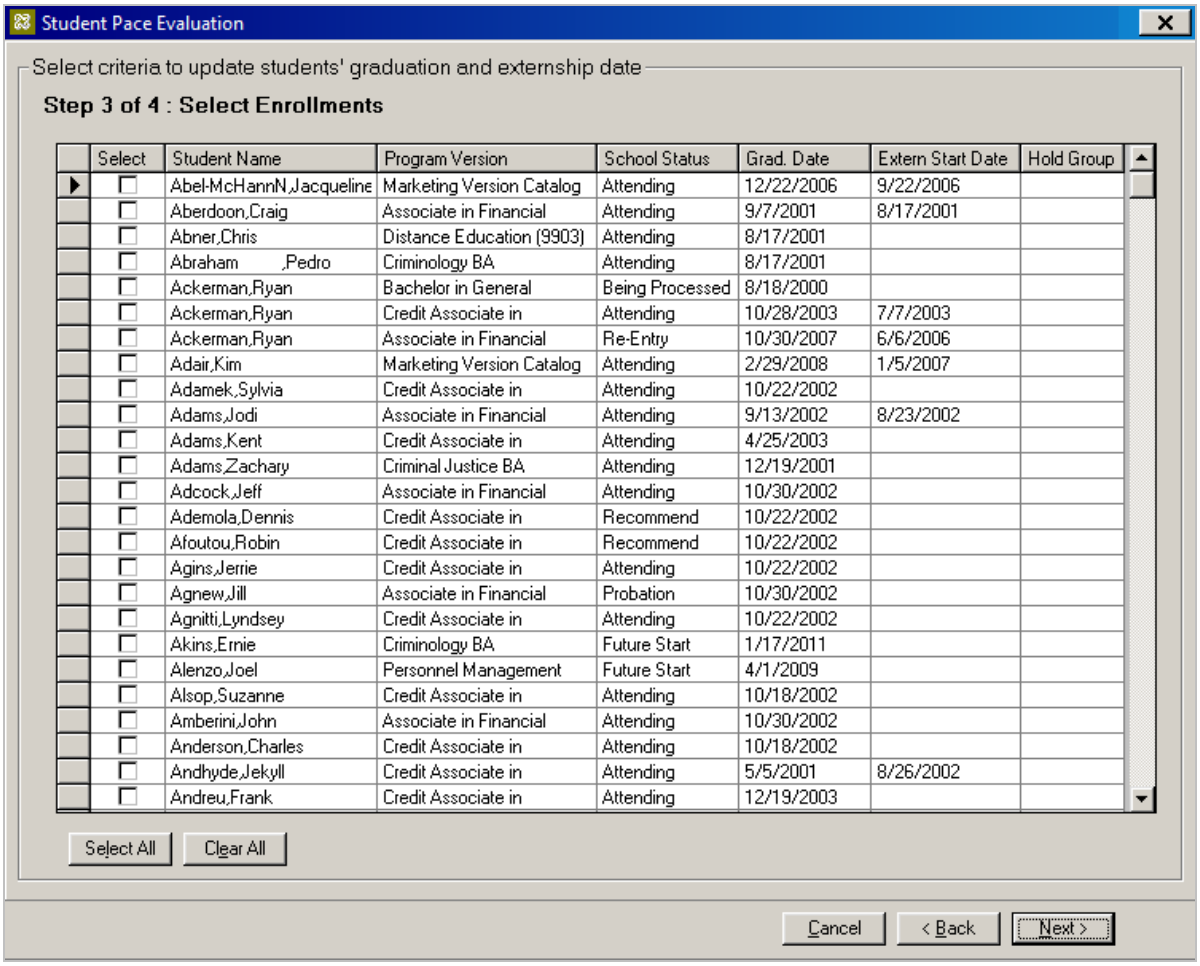
2. Select the applicable Campus(es) from the **Campuses** list. Use **Select All** or **Clear All** to select or clear *all* check boxes in the list. Click **Next**.

Step 2 of 4: Select Program Versions of the SPE tool is displayed.



3. Indicate the applicable **Program Version**(s) by selecting the check box(es) on the corresponding grid rows. Use **Select All** or **Clear All** to select or clear *all* check boxes in the list. Click **Next**.

   Step 3 of 4: Select Enrollments of the SPE tool is displayed.



Select	Student Name	Program Version	School Status	Grad. Date	Extern Start Date	Hold Group
☐	Abel-McHannN,Jacqueline	Marketing Version Catalog	Attending	12/22/2006	9/22/2006	
☐	Aberdoon,Craig	Associate in Financial	Attending	9/7/2001	8/17/2001	
☐	Abner,Chris	Distance Education (9903)	Attending	8/17/2001		
☐	Abraham ,Pedro	Criminology BA	Attending	8/17/2001		
☐	Ackerman,Ryan	Bachelor in General	Being Processed	8/18/2000		
☐	Ackerman,Ryan	Credit Associate in	Attending	10/28/2003	7/7/2003	
☐	Ackerman,Ryan	Associate in Financial	Re-Entry	10/30/2007	6/6/2006	
☐	Adair,Kim	Marketing Version Catalog	Attending	2/29/2008	1/5/2007	
☐	Adamek,Sylvia	Credit Associate in	Attending	10/22/2002		
☐	Adams,Jodi	Associate in Financial	Attending	9/13/2002	8/23/2002	
☐	Adams,Kent	Credit Associate in	Attending	4/25/2003		
☐	Adams,Zachary	Criminal Justice BA	Attending	12/19/2001		
☐	Adcock,Jeff	Associate in Financial	Attending	10/30/2002		
☐	Ademola,Dennis	Credit Associate in	Recommend	10/22/2002		
☐	Afoutou,Robin	Credit Associate in	Recommend	10/22/2002		
☐	Agins,Jerrie	Credit Associate in	Attending	10/22/2002		
☐	Agnew,Jill	Associate in Financial	Probation	10/30/2002		
☐	Agnitti,Lyndsey	Credit Associate in	Attending	10/22/2002		
☐	Akins,Ernie	Criminology BA	Future Start	1/17/2011		
☐	Alenzo,Joel	Personnel Management	Future Start	4/1/2009		
☐	Alsop,Suzanne	Credit Associate in	Attending	10/18/2002		
☐	Amberini,John	Associate in Financial	Attending	10/30/2002		
☐	Anderson,Charles	Credit Associate in	Attending	10/18/2002		
☐	Andhyde,Jekyll	Credit Associate in	Attending	5/5/2001	8/26/2002	
☐	Andreu,Frank	Credit Associate in	Attending	12/19/2003		

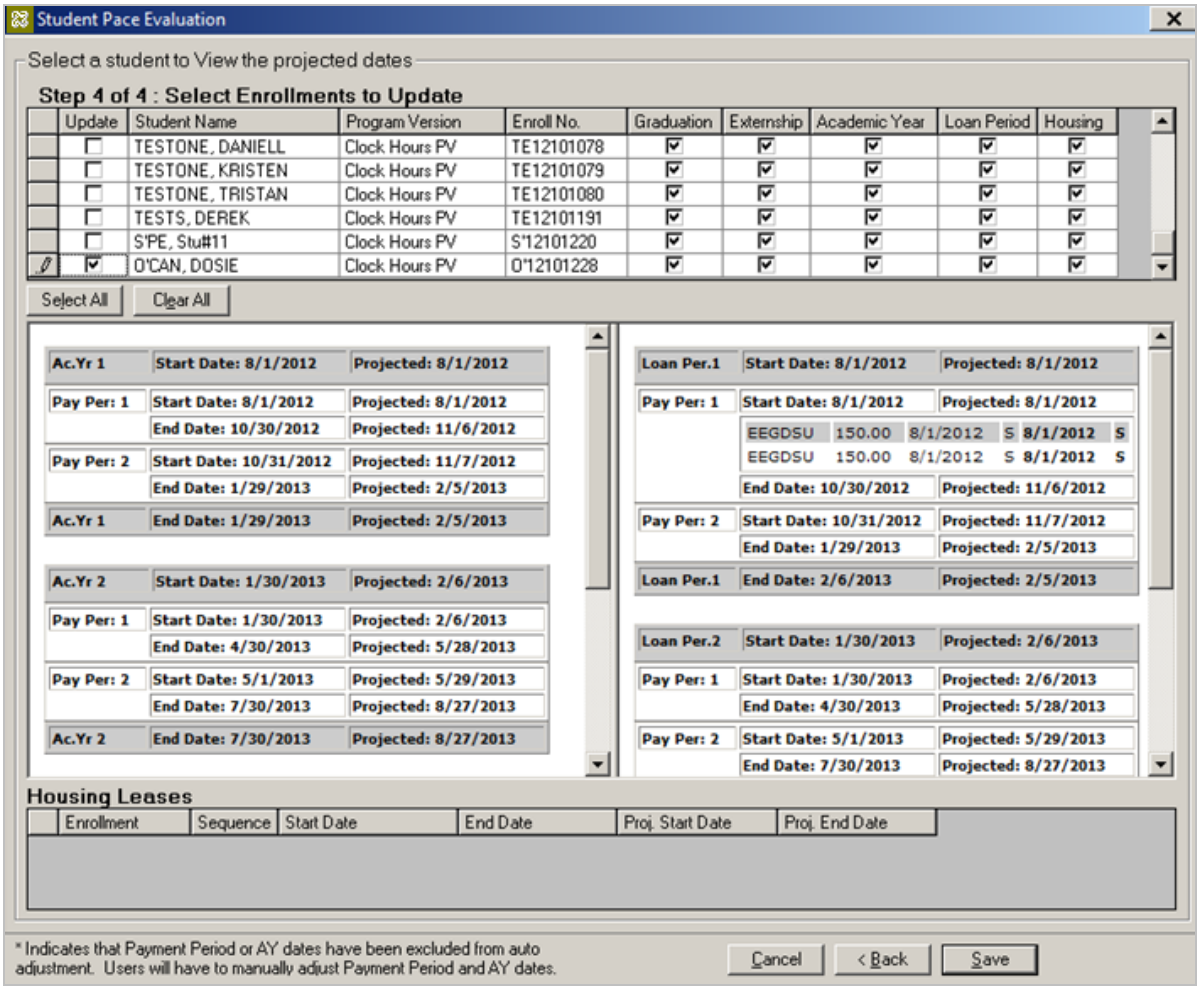
4. **Select** the check box for the student(s) you would like updated. Use **Select All** or **Clear All** to select or clear *all* check boxes in the list. Click **Next**.

   Step 4 of 4: Select Enrollments to Update of the SPE tool is displayed. It shows a list of selected students along with the projected dates for the Graduation Date, Externship Date, Academic Year Dates, Payment Period Dates, and Disbursement Dates that would change as the result of a student's progress in the chosen program.

5. **Select** a record in this grid to display the information in the lower grids. Select the **Update** check box to allow the record to be updated.

   The preview pane on the left lists academic years, the right pane displays loan period information. If there are loan periods associated with the award, it is displayed in the loan period pane; however; if no loan periods are associated, it is displayed in the academic year pane. The listing is either/or and will not show both at once.

   Note: Only enrollments with payment periods display academic year, payment period, and disbursement information.



Academic Years: This grid contains the academic years for the enrollment selected in the top grid. The grid also shows the current start and end dates along with the projected new dates. The selected record determines which payment periods are displayed in the Payment Periods grid.

Loan Periods: This grid contains the Loan Periods for the enrollment selected in the top grid. The grid also shows the current start and end dates along with the projected new dates. The selected record determines which payment periods are displayed in the Payment Periods grid.

BBAY Dates: This grid contains the BBAY Start and End Dates for the enrollment selected in the top grid. The grid also shows the current start and end dates along with the projected new dates. During SPE evaluation, if a student fails to progress as expected, this may cause the student's Loan Period to be extended. Should the Loan Period be extended, SPE will make the corresponding adjustments to the BBAY Start and End Dates by extending the BBAY Start and End Dates by the same number of days that the Loan Period Start and End Dates are extended. When the student has a stub loan period, the SPE evaluation will not adjust the BBAY start date. Also, if any adjustments made due to course progression, the Loan Period and the BBAY End Date will not be adjusted prior to the NSLDS End date on the stub loan period. For the Loan Period and BBAY dates to be adjusted by the SPE evaluation process, the Title IV Loan configuration must be enabled on the SPE settings and checked at the time of SPE evaluation.

Payment Periods: This grid contains the payment periods for the selected academic Year. The grid also shows the current start and end dates along with the projected new dates. Select a payment period to display any disbursement dates in the Disbursements grid.

Additionally, Payment Period dates will be flagged (*) if the manual Override Payment Period has been selected for the student. A caption noted with an asterisk * will appear at the bottom of each step of the SPE tool to indicate that the Payment Period dates have been excluded from auto adjustment and users will have to manually adjust the Payment Period and AY dates.

Note: The Academic Years and Payment Periods are updated based on the definition of instructional weeks as specified by the Department of Education (ED). The instructional weeks logic includes the weeks from failed courses and weeks from a dropped course prior to the drop date (by default). It does not include weeks while the student is on a leave of absence (LOA).

Outlined below are some of the general rules that CampusNexus Student follows when creating payment periods:

- When initially creating academic years and payment periods, CampusNexus Student uses instructional weeks to determine the actual dates based on the weeks attribute.
- The Start Date for Sequence 1 of a payment period sets the start date for the instructional weeks block for the enrollment.
- The initial payment period Start Date is aligned with the Program Version's Start Date

Rules for subsequent payment period start dates:

CampusNexus Student sets the Start Date to the day after the prior payment period's End Date in either of the following cases:

- If the first course in the subsequent payment period starts before the end date of the prior payment period,

  - OR -

- If the check box to align payment periods to course start and end dates is cleared (see Student Pace Evaluation Settings).

If these conditions are not met, CampusNexus Student sets the start date to the next course's start date, or the check box to align payment periods to course start and end dates is selected (see Student Pace Evaluation Settings).

Rules for payment period end dates:

The end dates are set to a point in time where both the "weeks" and "credits"/"hours" payment period attributes are satisfied. CampusNexus Student shows visibility into the dates calculated by displaying milestone dates of when the student will satisfy the attributes of the payment periods. The logic will take the greater of the two milestone dates and set the end date of the payment period to that date when the flag to align payment period to course start and end dates is cleared. If the check box to align payment periods to course start and end dates is selected, CampusNexus Student finds the course that encompasses the greater of the two milestone dates and sets the payment period end date to that date.

Note: A payment period can never end on a holiday configured in the Calendar set up in CampusNexus Student (**Lists > Academic Records > Calendar (tab)**). The End Date is always the day after the holiday ends.

Note: When SAP is executed by Payment Period End Date for clock hour programs and the institution has an excused absence policy, the excused absence policy is accounted for and incorporated.

Note regarding Payment Periods and Student Pace Evaluation (SPE) logic:
There is a difference in the calculations if the institution is configured to use Global as a servicer. See Title IV Payment Periods for more information.

Disbursements: This grid displays disbursements from the selected payment period if the date or the status is projected to change.

The disbursement dates for scheduled and ready to pay disbursement are moved the same number of days as the start date unless a disbursement would be moved outside of the payment period. If the previous logic would place a disbursement outside of a payment period then the system will apply the following rules:

- If the current system date is prior to the payment period start, then set the 1st disbursement to the start date and an additional disbursement to the midpoint.
- If the current system date is during the payment period, then set the 1st disbursement to the start date and an additional disbursement to the later of the midpoint or current system date.
- If the current system date is greater than the payment period end, then set the 1st disbursement to the end date of the payment period.

This record includes the amount of the packaged award, the disbursement number, the disbursement amount, the current and projected disbursement dates, and the current and projected disbursement status.

Note: CampusNexus Student marks Title IV grant disbursements as Canceled if the payment period (with which the disbursement is associated) start date or the disbursement date is adjusted by the SPE tool to fall after the end of the award year, i.e., after June 30 of the award year. In the case of Pell, ACG, SMART, and SEOG grants, the payment period start date is considered when determining whether disbursements will be canceled; for Perkins loans, which are campus-based loans that follow similar regulations as Title IV grants, the disbursement date is considered when determining whether disbursements will be canceled. When a disbursement is canceled on this basis, CampusNexus Student updates the award amount accordingly.

If the change is made by the SPE tool job, CampusNexus Student assigns SPE TOOL AUTO USER as the user who canceled the disbursement. If the change is made by running the SPE tool through the Tools menu, CampusNexus Student records the User ID of the user who runs the SPE tool as the user who canceled the disbursement.

If configured to do so, SPE can cancel a direct loan or any remaining scheduled disbursements of the direct loan:

- When the SPE update causes the loan's BBAY start date to be later than the Award Year's end date.

  - OR -

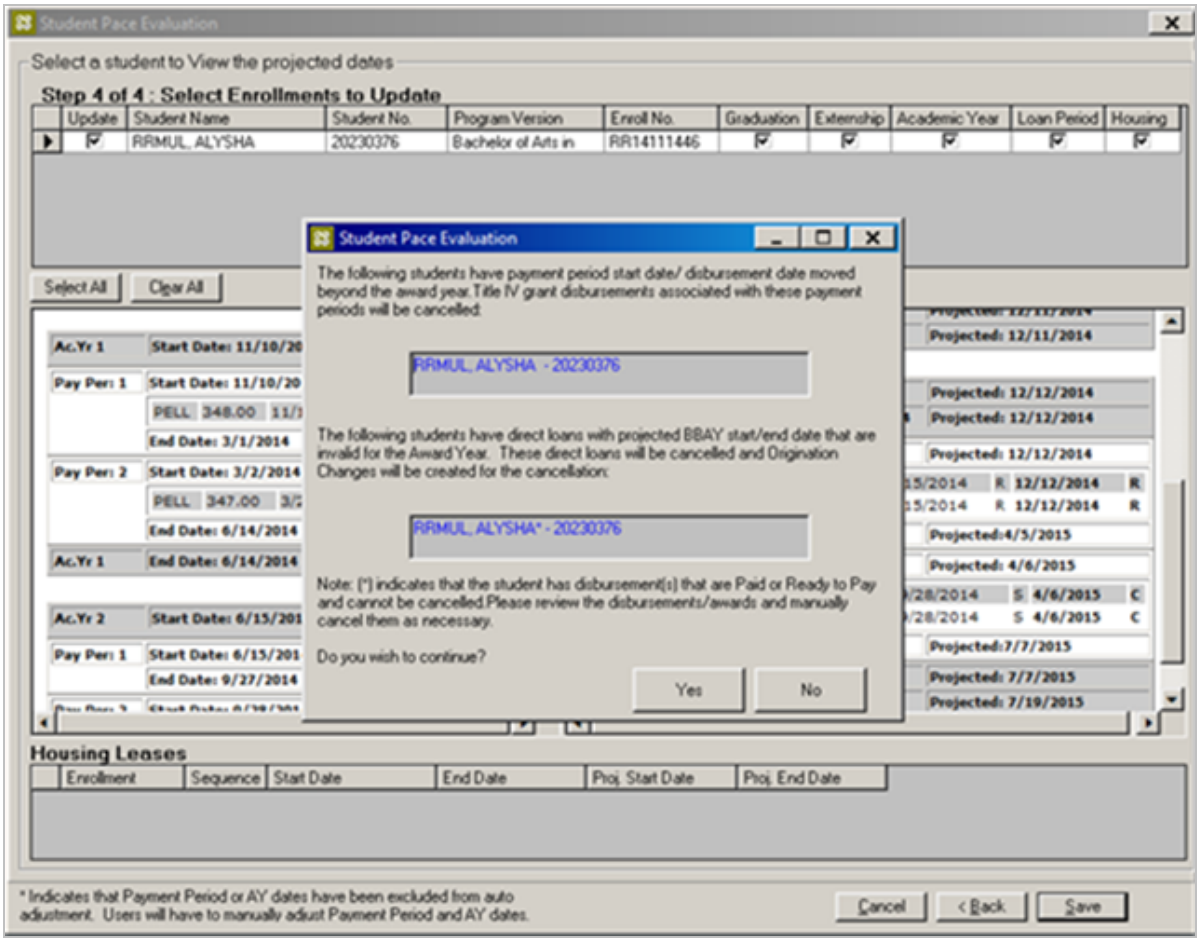
- When the SPE update causes the BBAY end date to be earlier than the Award Year's start date.

To configure this option, select Yes for "*Cancel loan when loan dates are invalid?*" in the Direct Loan Setup form. For the direct loans that cannot be cancelled due to Paid or Ready to Pay disbursements, CampusNexus Student cancels all remaining scheduled disbursements. Direct loan disbursements that will be cancelled are displayed on the SPE user interface with the Projected Status as 'C' (Cancelled). Additionally, CampusNexus Student automatically creates origination change records for the cancelled loan if the loan is eligible for origination changes. For this to occur the Origination Status must be 'Accepted' or 'Batched to Send', and the configuration '*Auto Create Orig. Changes/Adjustments for cancelled disbs/refunds?*' option in the same Direct Loan Setup form option must be set to Yes. CampusNexus Student also creates Origination Changes for the cancellation if the *Auto create Orig. Changes/Adjustments for canceled disbs/refunds?* option in the same Direct Loan Setup form option is set to Yes.

Note: When a loan or remaining scheduled disbursements of a loan are cancelled by the SPE due to invalid loan dates, the loan's dates at the loan level (the loan period and BBAY start and end date as well as disbursement dates) are not updated to the projected invalid dates. This ensures that the origination changes for the cancellation pass loan dates validation during Export to COD.

Additionally, you can configure CampusNexus Student to notify a staff member when a direct loan is cancelled or cannot be cancelled by SPE. See Auto Update Alert on the Financial Aid tab of the Campus Information form.

Before updating the students' data, the SPE tool will notify you if there are students who have Title VI grant disbursements or direct loans to be cancelled as a result of the update. This alert also indicates students whose Title IV grant disbursements and/or loans that cannot be cancelled due to Paid or Ready to Pay disbursements. You can decide whether to proceed.



Housing Leases: This grid displays student leases with a Housing Period of Academic Year that can be updated by the tool. For each lease, the enrollment, sequence number, current lease start date, current lease end date, projected lease start date, and projected lease end date are displayed.

Note: When a student's lease is updated with new academic year dates, CampusNexus Student checks if the room is available for the new dates. If the room is occupied by another student on the new dates, the lease will be extended for the student currently occupying the room and the other student's lease will be marked as pending. The Lease Exception report may then be used to identify students with pending leases who will have to be assigned new accommodation.

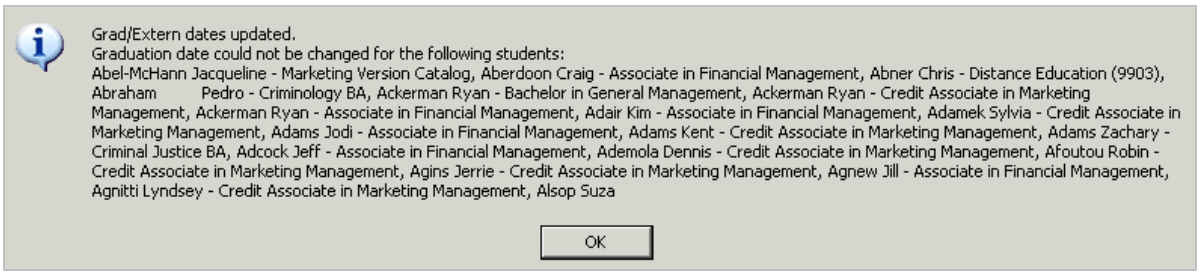
LOA Students: Leave of Absence (LOA) students are gathered in the tool and dates adjusted using the expected return date for Academic Calendars that contain payment periods. If the student does not return on or before the expected return date, CampusNexus Student continues to adjust the dates each time the tool is run. If a student is placed on LOA after completing payment period 1 in an academic Year but before completing any credits/hours in the next payment period, the start date of the payment period is adjusted to the return date from LOA.

6. Select **Save** to save your changes, **Cancel** to discard your changes, or **Back** to return to the previous screen.

   Upon clicking **Save**, if any Title IV grant disbursements for the selected student(s) are subject to cancellation (see Disbursements above), CampusNexus Student displays a warning message listing the students for whom disbursements are about to be canceled and asking if you would like to continue.

   If you click **Yes**, CampusNexus Student continues to update the payment period dates, academic year dates, and graduation dates, cancels the indicated disbursements, and updates the total award amounts for the selected enrollments.

7. A message notifies you that the graduation/externship dates have been updated and lists any exceptions. Click **OK** to close the message.



Transfer Enrollment Settings for Payment Period Logic

When the transfer enrollment process is performed on students in Program Versions that use payment periods, select the logic to transfer the start date and the academic Year information or to not transfer the start date and academic Year information. This setup is found under **Setup** > **Campus Locations** > **Transfer Opt.** tab. The check box to transfer the start date and academic Year information can be selected independently of each other; however, you should not select one without the other as the SPE tool logic needs these to be synchronized for the tool to work correctly.

When the start date is transferred during an enrollment transfer with a program version configured for non-term, the Financial Aid will be transferred to the new enrollment. Selecting the start date to transfer is a trigger for CampusNexus Student to allow the Financial Aid to move to the new enrollment. You must validate the rules below as designated by the Department of Education as CampusNexus Student currently does not have a rules engine to determine these validations.

You may consider a student who transfers from one program to another at your institution to remain in the same payment period if all of the following conditions apply:

- The student is continuously enrolled at your institution.
- The coursework in the payment period the student is transferring out of is substantially similar to the coursework the student will be taking in the program into which he/she is transferring.
- The payment periods are substantially equal in length in weeks of instruction and credit or clock-hours.
- There are few or no changes in institution charges associated with the payment period.
- The credits from the payment period the student is transferring out of are accepted for credit in the new program.

When the start date is not transferred during an enrollment transfer, Financial Aid will not be moved to the new enrollment.

Course Retake Logic for Non-Term Programs within the Student Pace Evaluation Process

The logic of the SPE tool for non-term programs does not consider course retakes in which credit has previously been earned in the payment period, academic year, and graduation date calculations. In other words, a retaken course where credit has previously been earned is not used to start or end payment periods or academic years. Additionally, the credits earned on the retake instance are not included when calculating whether the student has met the credits required to progress to the next payment period or academic year. For students in non-term programs, the expected graduation date is updated based on the projected academic year dates, so the payment period and academic year logic affects the expected graduation date accordingly.

Example 1: Retake after failing the course and not receiving credit

Program Length: 24 credits and 30 weeks

Academic Year: 24 credits and 30 weeks

Payment Periods: 2 payment periods, each 12 credits and 15 weeks (1-12 credits and 13-24 credits)

Each payment period consists of three courses at 4 credits each. The student passes two courses and fails the third (student does not earn the credit for the course). The student must retake the course to have successfully completed the 12 credits defined for the payment period. Once the student has successfully passed the retaken course, the student progresses to the next payment period as long as the weeks part of the payment period definition has been met. Until the student successfully completes the retaken course (assuming they retake the course immediately after the first instance,) the student is considered to remain in the first payment period.

Example 2: Retake after passing the course and receiving credit

Program Length: 48 credits and 60 weeks

Academic Year: 24 credits and 30 weeks

Payment Periods: 2 payment periods, each 12 credits and 15 weeks (1-12 credits and 13-24 credits)

Each payment period consists of three courses at 4 credits each. The student passes all three courses but needs to retake one of the courses to receive a better grade. The student has already received credit for the first payment period based on the coursework assigned to that payment period (the earned credit from the retaken course has been included) and 15 weeks have elapsed. The student is considered to have completed the first payment period and, if all other eligibility requirements have been met, may receive a Title IV disbursement for the subsequent payment period. Although the institution may charge the student for retaking the course, the student may not receive a Title IV payment for this course again. In addition, the course retake is not considered for determining the credits successfully completed in the subsequent payment period. For example, since the program length in this example is 48 credits, this retaken course would not count when determining whether the student progresses from the 13-24 credit payment period in the first academic year to the 25-36 credit payment period in the second academic year.

Impact of SPE on Overlapping Loan Periods

The SPE tool does not update loan dates for a stub loan period so that the stub loan period truly reflects the student's overlapping loan period and correctly shows the student's progress in subsequent loan periods. For programs configured with Academic Calendar 5 and 6, changes to the student's schedule (e.g., course registration, unregistration, course association, reassignment of courses, and posting of pass, fail, CLEP, and transfer final grades) do not affect the following dates of the stub loan period:

- LP end date
- BBAY start and end date
- Loan end date of any direct loans associated with the stub loan period
- BBAY start and end date of any direct loans associated with the stub loan period
- Disbursement dates of any direct loans associated with the stub loan period

Dates for subsequent LPs continue to be updated using current SPE logic.

The SPE tool applies *Scheduled Complete* or *Completed* flags to overlapping loan payment periods (LPPs) for all programs configured with Academic Calendar 5 and 6 using the logic below:

- LPPs of the stub loan period are flagged as Schedule Complete when enough credits/hours are registered.
- LPPs of a stub loan period are flagged as Completed when all courses that end within the LPP have final grade posted.

LPPs of the subsequent LPs are marked as Schedule Complete or Completed using standard SPE logic.

When the last LPP of the stub loan period is marked as *Scheduled Complete* or *Completed*, the SPE tool updates the following values for the stub loan period and rebuilds subsequent LPs to reflect the true remaining credits/hours and instructional weeks needed to complete the program:

- The number of credits/hours of the stub loan period is updated to the total number of credits/hours of Scheduled Complete / Completed courses that have the end date within the stub loan period's date range.
- The number of weeks in the stub loan period is updated with the calculated number of instructional weeks of all the Scheduled Complete / Completed courses that end within the stub loan period's date range.
- The attributes of the payment periods of the stub loan period are updated based on the updated credits/hours and weeks of the stub loan period.

The SPE uses the course expected end date or actual end date to determine if the course falls within the overlapping period. This allows the SPE to calculate and update the correct attributes for the overlapping loan period when the LP is Scheduled Complete / Completed. To update the attributes of the PP during Scheduled Complete / Completed the LP's credits/hours are divided in halves (if there are two LPPs) for each LPP.

Note: In some scenarios, the stub loan period's credits/hours are updated as a result of Scheduled Complete/Completed and the new attributes require the LPP of the stub loan period to be removed or added. For example, the stub loan period was originally created with credits/hours that are more than half of the full AY definition and therefore two LPPs were created. When setting the Scheduled Complete / Completed flag for the LPPs of the stub loan period, CampusNexus Student calculated the actual credits/hours Scheduled Complete/Completed and updated the credits/hours and IWs for the stub loan period accordingly. However, the new credits/hours attribute of the stub loan period is less than half of the full AY definition and therefore the stub loan period should have only one LPP. In this scenario, the removal of the second LPP of the stub loan period must be manually removed and the first LPP should be updated accordingly.

Configuring Multiple Disbursement Definitions

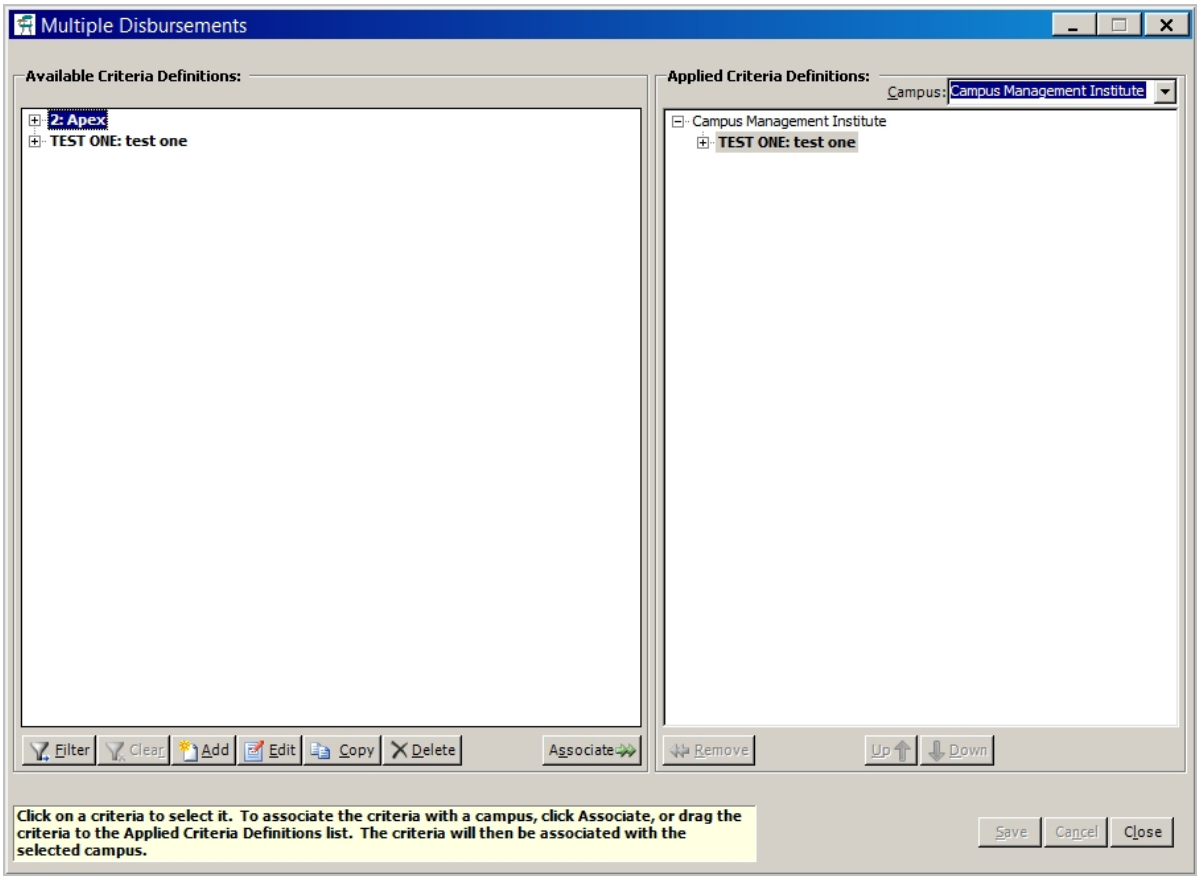
Before enabling the Multiple Disbursements feature in the Financial Aid tab of the of the Campus Information form, the Multiple Disbursement Criteria Definitions must be created and saved for the campus being configured. The Multiple Disbursements form allows users to perform a variety of configuration tasks (e.g., add, edit, copy, delete, and associate their rules to a campus) for Multiple Disbursements. The form supports Drag and Drop capability. There is also a Filter function so that after rules have been established, the user can filter for specific items to see rules that have specific conditions.

The Multiple Disbursements feature uses rules created in several areas of CampusNexus Student. The Multiple Disbursements form contains Criteria Definitions that enable users to perform a variety of configuration tasks that can be driven by the institution's business rules concerning Multiple Disbursements.

Note: If the Definitions are not configured for a campus, an error message is displayed when the Enable Multiple Disbursements check box is selected on the Campus Information form's Financial Aid tab.

Rules in the Applied Criteria Definitions section of the Multiple Disbursement form are applied in order, so it is important for institutions that opt to configure a variety of rules that the most specific rules be at the top of the list. If a very general rule is at the top (for example, no specific information about population and set to assign X% of payment period) and it is followed by a very specific rule (for example, a rule for first-time borrowers living in the state of Tennessee), the dates would likely be assigned by the first rule rather than the second rule, because Multiple Disbursements looks to see if a date can be assigned and would move to subsequent criteria only if it cannot be defined by the preceding rule.

1. Navigate to: **Tools > Financial Aid > Multiple Disbursements**. The Multiple Disbursements form is displayed.



2. Select a **Campus**.
3. Drag and drop Definitions from the **Available Criteria** to the Applied Criteria list as needed, or select the Available

Criteria and click **Associate** to move the Definition.

4. Drag and drop definitions from the Applied Criteria list to the Available Criteria list to remove them, or select Definitions on the Applied Criteria Definitions list and click **Remove** to move them back to the Available Criteria Definitions list.
5. Click **Filter** to filter the Available Criteria list.
6. Click **Clear** to clear the filter, allowing a new filter to be created.
7. Click **Add** to add a Definition.
8. Select a Definition and click **Edit**to change the Definition properties using the Multiple Disbursement Editor.
9. Select a Definition and click **Copy** to create a new definition with the same properties for later editing.
10. Select a Definition and click **Delete** to remove it from the Available Criteria list.
11. Select a Definition in the Applied Criteria list and click **Up** to move the Definition higher on the list,.
12. Select a Definition in the Applied Criteria list and click **Down** to move the Definition lower on the list
13. Click **Save** to save the settings.
14. Click **Cancel** to cancel changes.
15. Click **Close** to close the form.

Field Descriptions

Field	Description
Filter	Activates the filter window
Clear	Clears the filter and shows all criteria
Add	Adds a new criteria and its associated rules
Edit	Opens the Multiple Disbursements Editor form, to edit the selected Definition Criteria
Copy	Copies the Definition Criteria and opens a new copy of it in the Multiple Disbursements Editor
Delete	Deletes the selected Definition Criteria
Associate	Associate the selected Definition Criteria with a campus
Remove	Removes the selected Definition Criteria
Up/Down	Moves the selected Definition Criteria up or down as needed

Tools > Student Accounts

The Tools > Student Accounts submenu options are as follows:

- Change Billing Method
- Purge Billing Statement Records
- Unlock Refund/Stipend Records
- Reallocate Applied Credits
- Update Incremental Units/Offset

Change Billing Method

CampusNexus Student enables institutions to change billing methods for students based on the campus and expected start date. This is a manual process by which the authorized user can enter a date range and modify the billing method of records that fall within the date range. Typically, this feature is used to correct billing methods assigned in error, or update billing methods based on changes within a school.

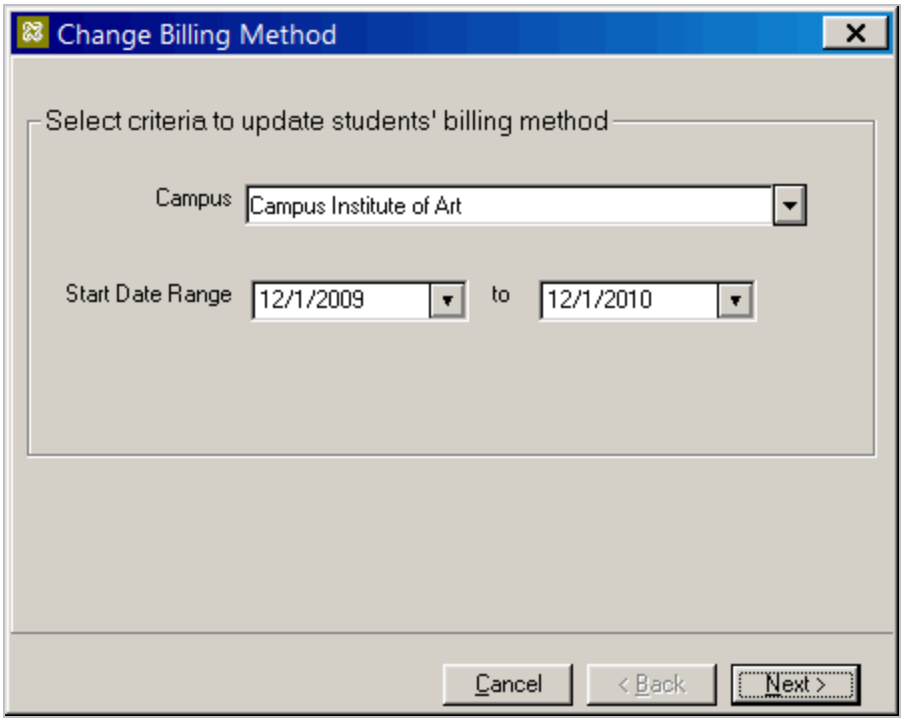
The billing methods options are based on:

- Academic Year
- Course
- Program
- Term

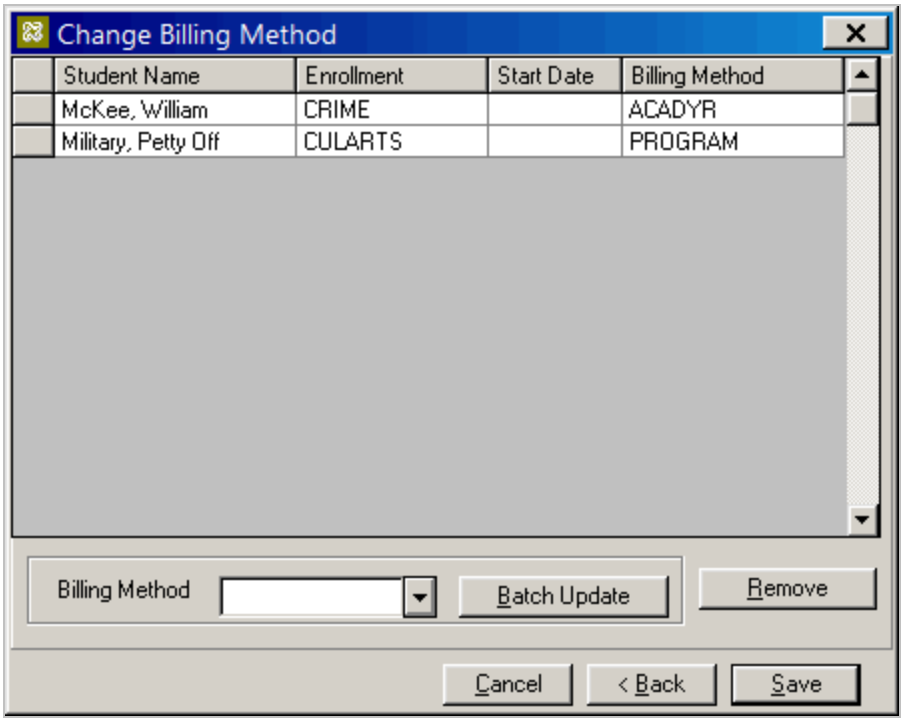
For detailed information on setting up billing methods, refer to Billing Methods.

To change the billing method manually:

1. Navigate to **Tools > Student Accounts > Change Billing Methods**. The Change Billing Methods form is displayed.
2. Select a **Campus, Start Date Range** and **End Date**.



3. Click **Next**. A list of students who meet the selection criteria is displayed.



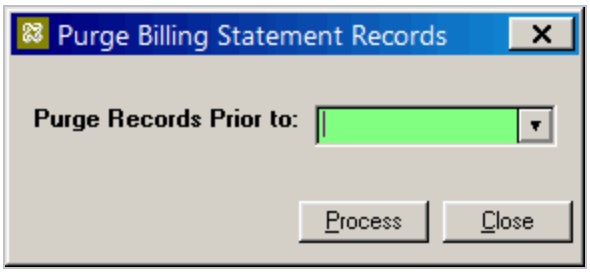
4. To remove a record from list, select the record and click **Remove**. A confirmation message is displayed. Click **Yes**.
5. To change the billing method for all students in this list, click in the **Billing Method** field, select an option, and click **Batch Update**. A confirmation message is displayed. Click **Yes**.
6. To change the billing method for individual students, click in the Billing Method column of the student record, click , and select an option. A confirmation message is displayed. Click **Yes**.
7. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Purge Billing Statement Records

Students can view billing statements in Portal. Institutions can decide how many statements are displayed to the student and purge statements as needed. For example, your institution wants to display billing statements only for the term. When the term is over, the billing statements are purged. Use this tool to purge historical billing statement records.

To Purge Billing Statement Records:

1. Navigate to **Tools > Student Accounts > Purge Billing Statement Records**.



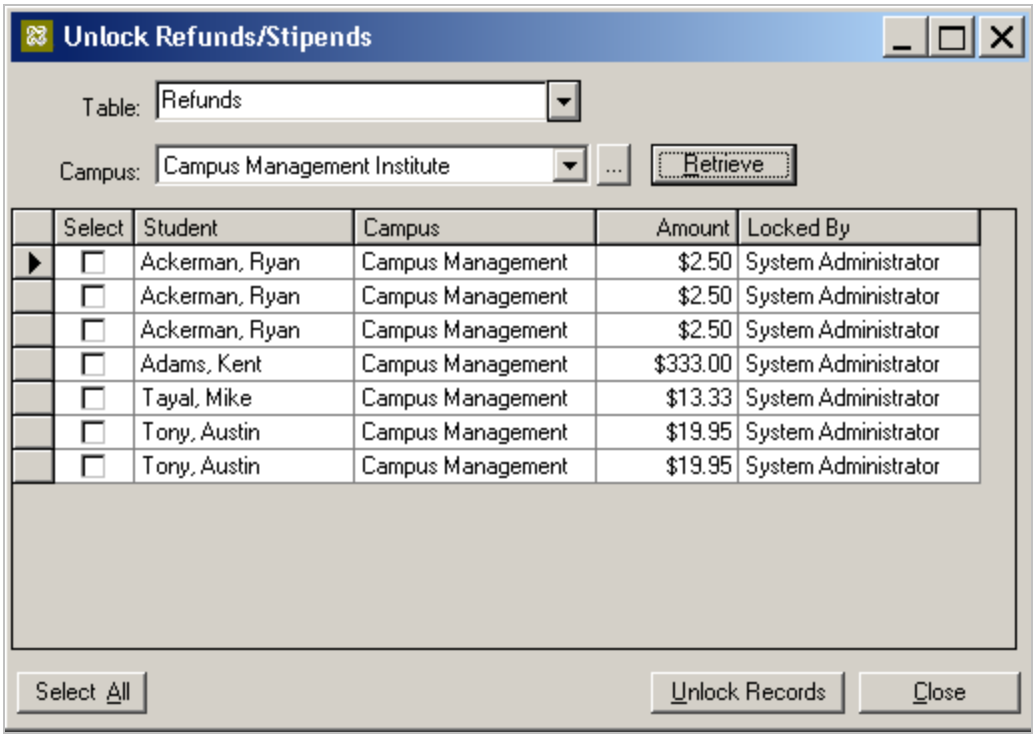
2. Select an appropriate date from the **Purge Records Prior to** calendar.
3. Click **Process**. A confirmation message is displayed. Click **Yes**. The records containing a closing date that is on or before the date selected are deleted.
4. A confirmation message is displayed. Click **OK**.

Unlock Refunds/Stipends

CampusNexus Student enables a system administrator to clear a locked stipend or refund record in case the lock cannot be cleared by normal methods. For example, if a user who has a lock on a file went on vacation or if a system locks up or crashes, the lock remains on the record and a system administrator needs to perform a manual unlock.

To unlock a stipend or refund manually:

1. Navigate to **Tools > Student Accounts > Unlock Refund/Stipend Records**. The Unlock Refunds/Stipends form is displayed.
2. In the **Table** list, select Refunds or Stipends.
3. Select the **Campus**.



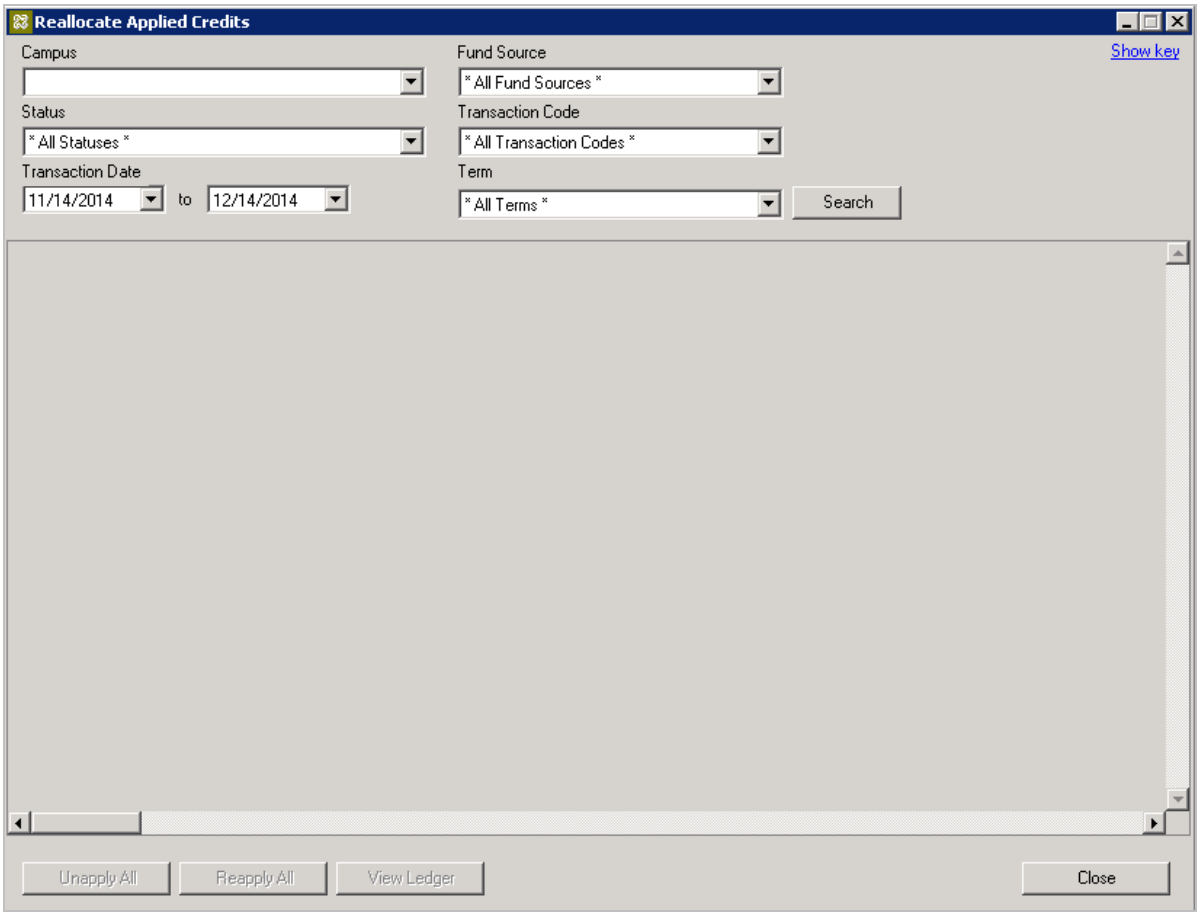
4. In the **Select** column, select the record(s) you want to unlock.
5. Click **Unlock Records**. A confirmation message is displayed. Click **OK**.

Reallocate Applied Credits

Use this tool to redistribute credits that were previously applied to debits.

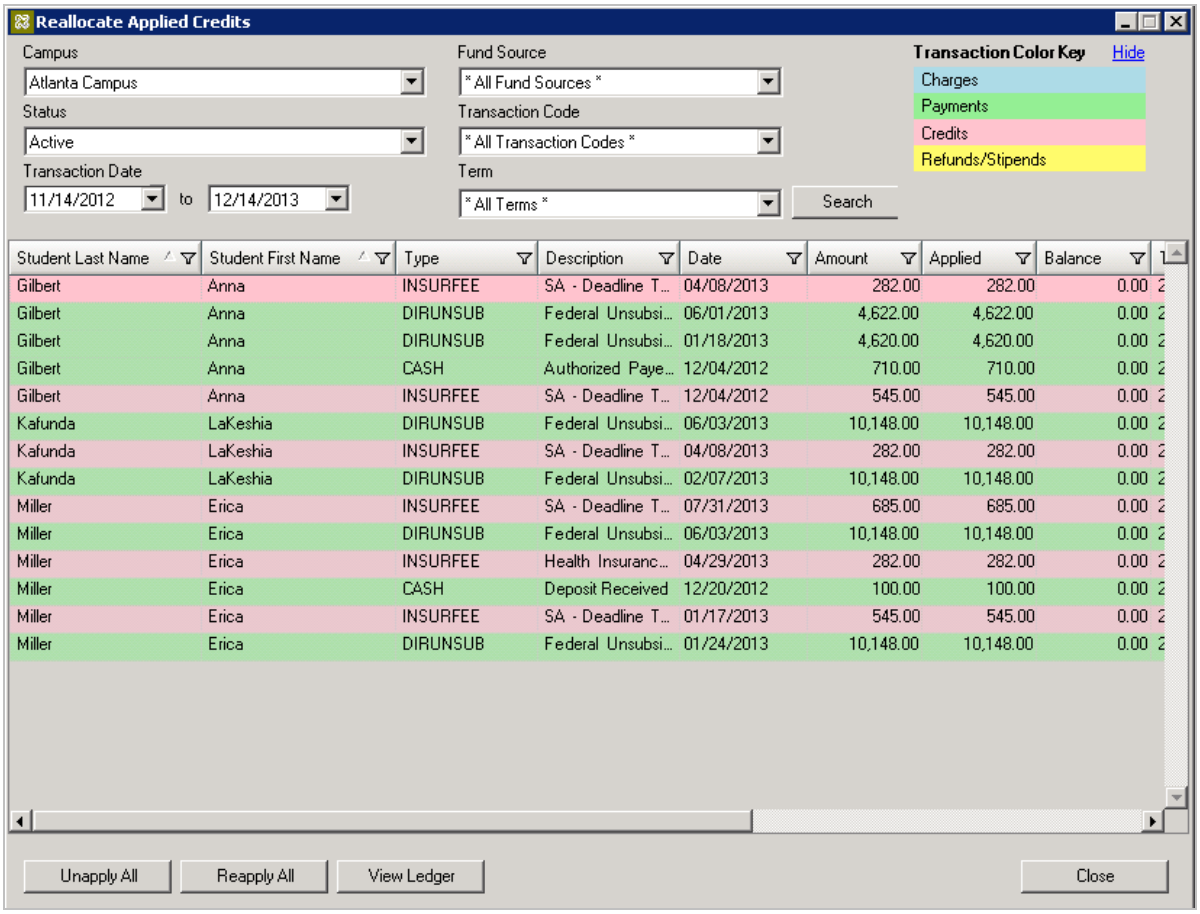
To reallocate applied credits:

1. Navigate to **Tools > Student Accounts > Reallocate Applied Credits**. The Reallocate Applied Credits form is displayed.

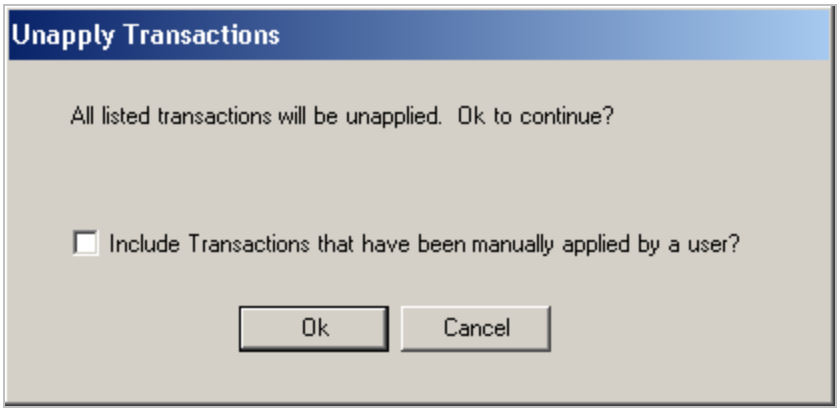


2. To find unapplied credits, select appropriate options from the following search criteria:
   - **Campus**
   - **Fund Source**
   - Student enrollment **Status**
   - **Transaction Code** - Select a fund source that has credits applied to the selected transaction code. Selecting a transaction code does not mean only transactions with the selected transaction code are displayed.
   - **Transaction Date**
   - **Term**
3. Click **Search** to display the list of credits. The form lists all transaction types.

a. Click the **Show key** link to view the Transaction Color Key for the color codes applied to the transactions types.
b. Click the column headings to sort the records.
c. Click the filter icon and select an option from pre-defined filter fields or specify a custom filter.

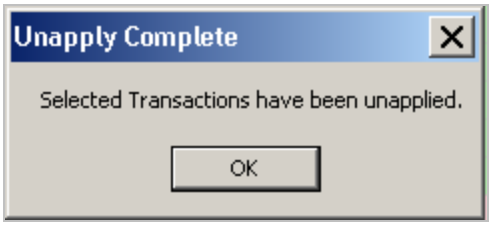


4. Select one of the following actions:
   a. Click **Unapply All** to remove all the credits from the debits at one time. The following message is displayed:

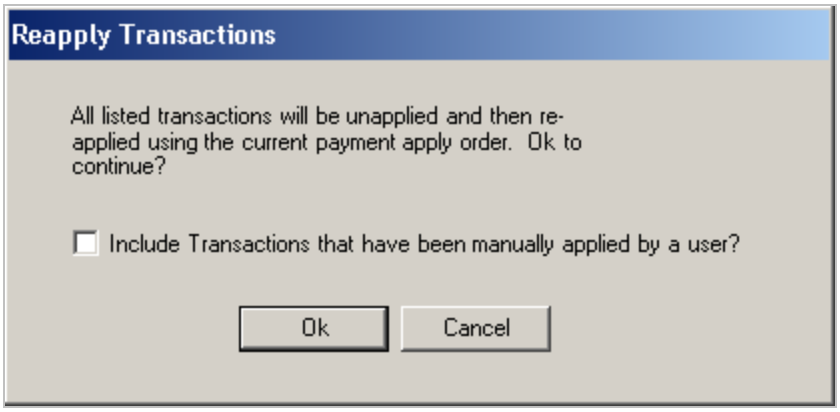


By default manually applied transactions are not included in the Unapply All function. When you select **Include Transactions that have been manually applied by a user?**, you can override the default and choose to include manual transactions in the unapply activity.

Click **Cancel** to abort the transaction or click **OK** to keep your changes. A confirmation message is displayed. Click **OK**.

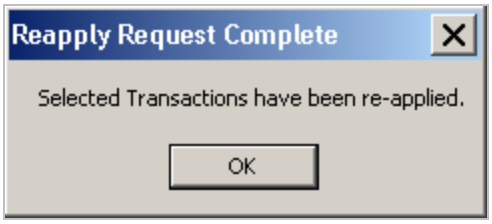


b. Click **Reapply All** to unapply the credit transactions from the debit transactions and then reapply them based on the hierarchies configured in Configure Payment Apply Order. The following message is displayed:



By default, manually applied transactions are not included in the **Reapply All** function. When you select **Include Transactions that have been manually applied by a user?**, you can override the default and choose to include manual transactions in the reapply activity.

Click **Cancel** to abort the transaction or click **OK** to keep your changes. A confirmation message is displayed. Click **OK**.



c. Click **View Ledger** to display the Student Ledger Card for the student associated with the currently selected row in the grid. See Ledger Cards for more information.

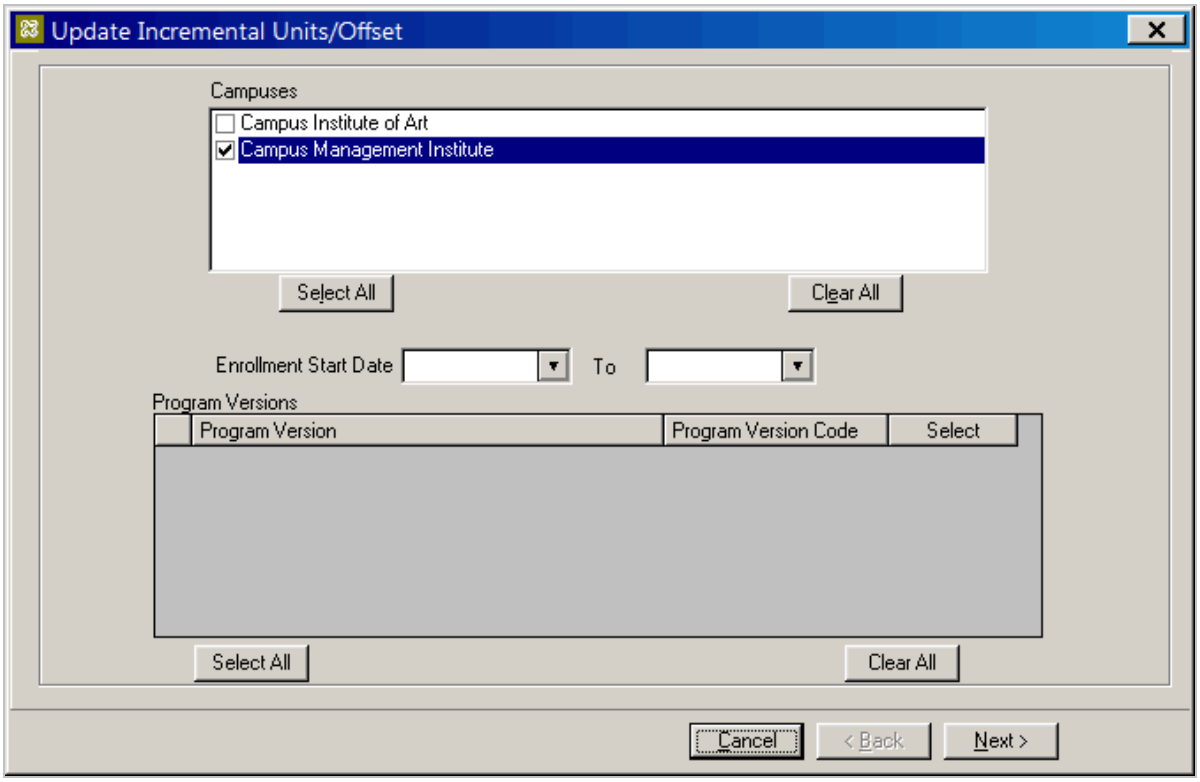
Update Incremental Units/Offset

CampusNexus Student enables a system administrator to update incremental units/offset for charges associated with program versions.

Note: This is a custom feature that is not available to all clients. This feature is used for incremental billing and earning by academic year. For more information, contact your Anthology Inc. account representative.

To update incremental units/offset :

1. Navigate to **Tools > Student Accounts > Update Incremental Units/Offset** . The Update Incremental Units/Offset form is displayed.
2. Select one or more **Campuses**.



3. Specify the **Enrollment Start Date** range.
4. Select the **Program Versions** and click **Next**.
5. Specify the incremental units/offset and click **Finish**.

Tools > Academic Records

The Tools > Academic Records submenu options are as follows:

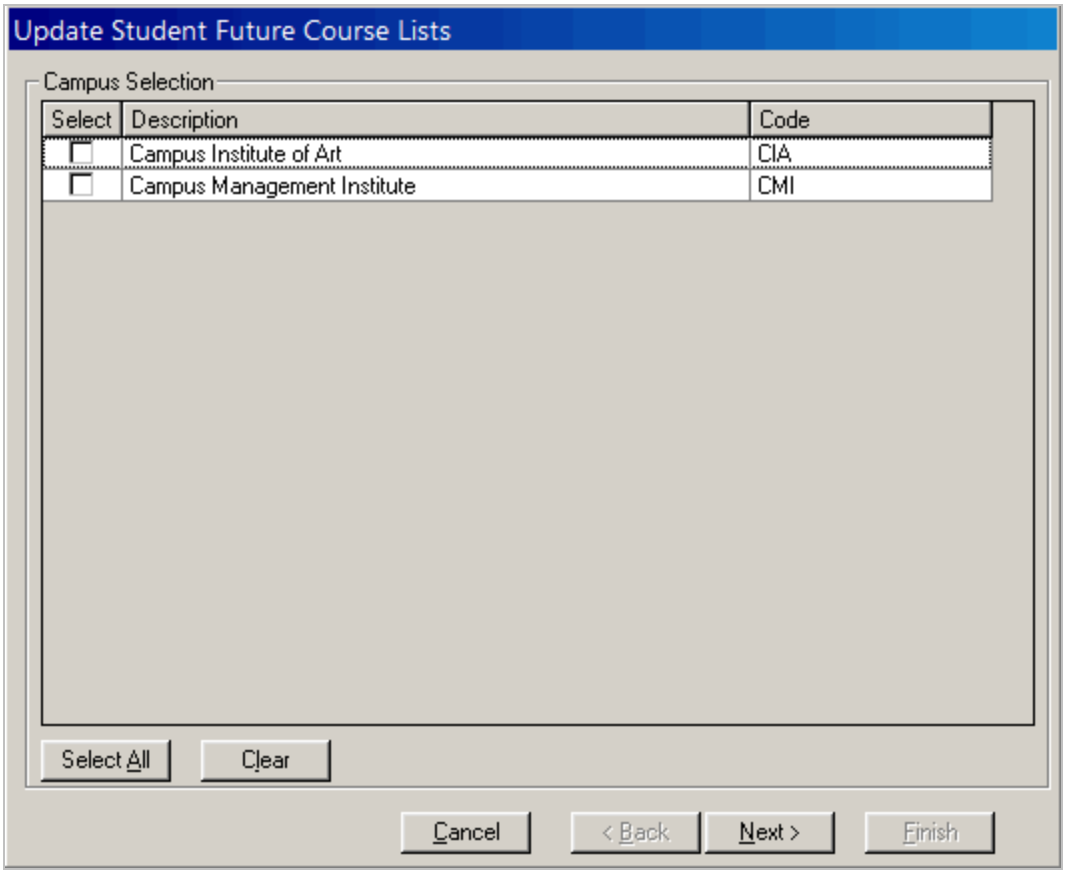
- Update Student Required Course Lists
- Student Pace Evaluation
- Change Course Description
- Deactivate Start Dates
- Archive Attendance
- Modify Term Relationships
- Batch Catalog Assignment
- Update Version Start Date
- Update Grade Scale

Updating Student Required Course Lists

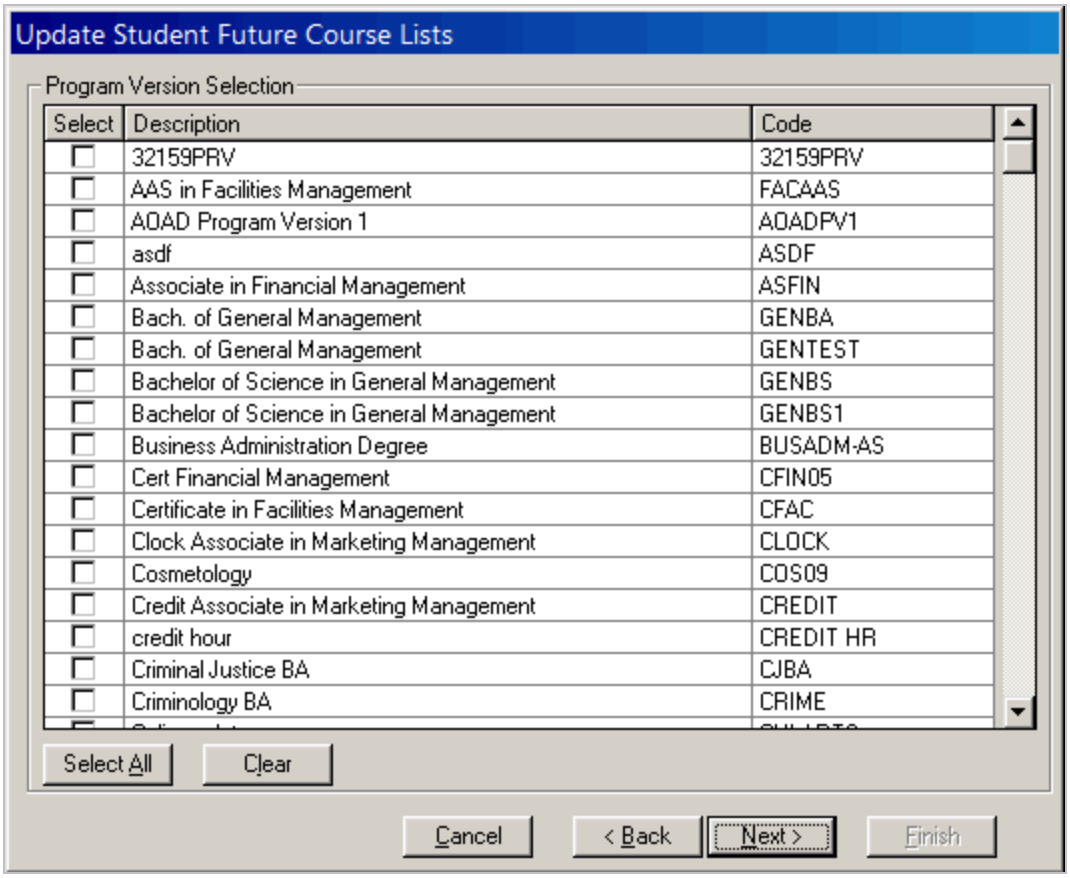
The Update Student Required Course Lists tool re-evaluates non-term students for academic year, loan periods, and Student Pace Evaluation (SPE). The tool allows CampusNexus Student to process enrollments through the AY/LP evaluation logic and SPE logic after updating the course list for any enrollments using a non-term program version when Courses Exempt from Progression (CEFP) is enabled, and the academic calendar is selected for processing in the SPE settings.

Confirmation occurs on the student's AYs and LPs if CEFP is enabled after the required course list is changed by the tool. The AY/LP sequences must have enough credits or hours and weeks to complete the program version requirements. You can specify the criteria for the rebuilding of required course lists.

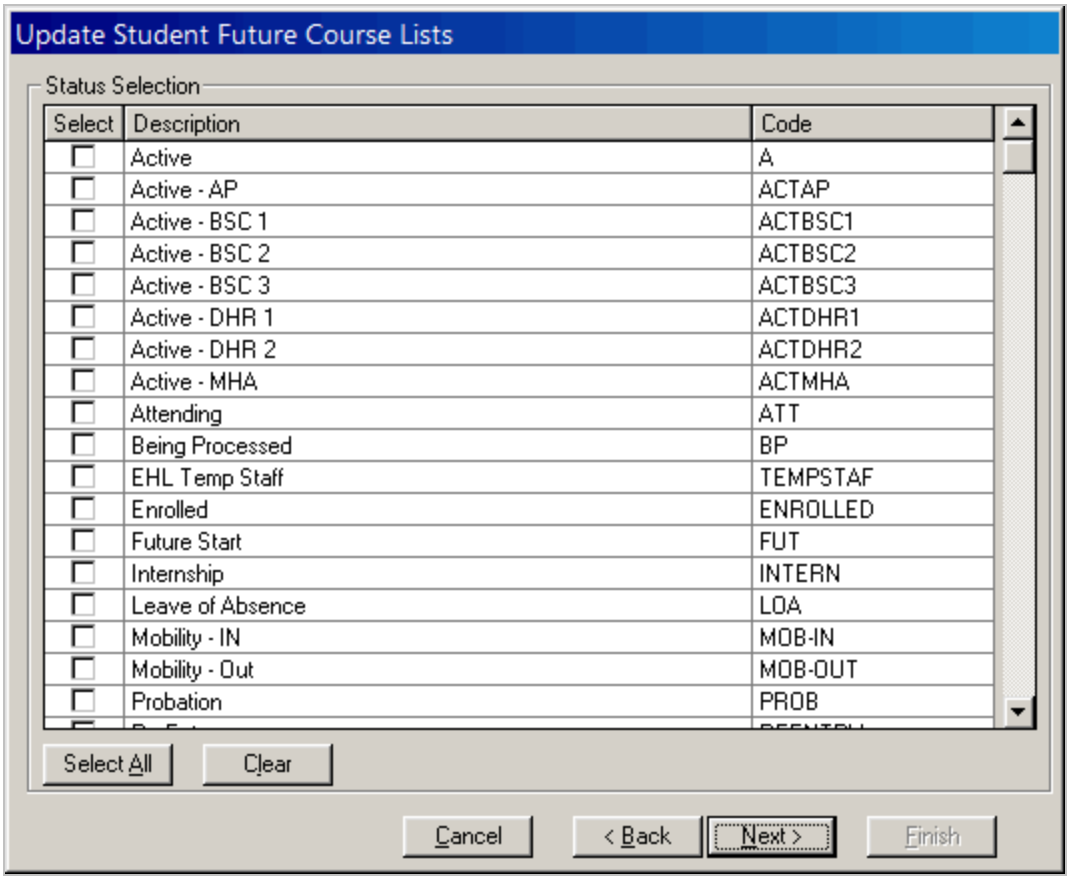
1. Navigate to **Tools** > **Academic Records** > **Update Student Required Course Lists**. The Update Student Future Course Lists form is displayed.



2. Select one or more **Campuses**. Click **Next**.
3. Select the **Program Versions** and click **Next**.

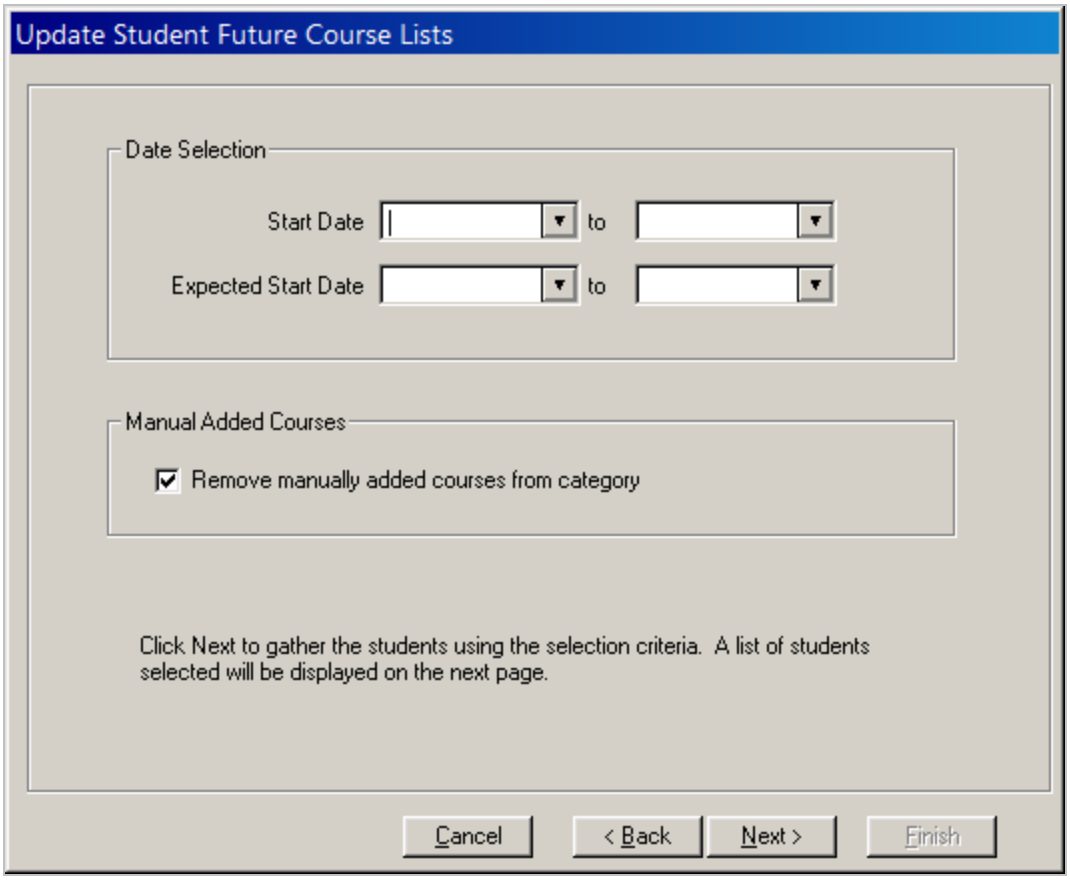


4. Select the **Statuses** and click **Next**.



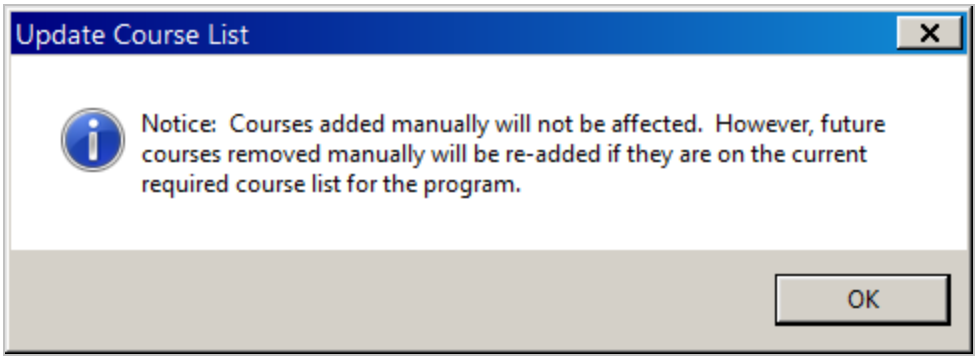
Note: A school status is included in the list only if it relates to a specified status category. Since this data cleanup option is not applicable to out of school students, school statuses with status categories of L (Lead), N (Never Attended), and P (Permanent Out) are omitted from the list. Placement school statuses (status category of G) are also omitted from the list.

5. In the **Start Date** field, enter a low date only, a high date only, or both.



6. The **Remove manually added courses from category** check box is selected by default. When selected, manually added courses are removed from the Course Category on the Degree Progress Audit. When the check box is cleared, manually added courses are not removed from the Course Category on the Degree Progress Audit.

   When Courses Exempt from Progression (CEFP) is not enabled, the following warning message is displayed when you run the Update Student Required Course List tool:



   When CEFP is not enabled, the warning message displays the following additional information:

   Running this Tool on a Program Version configured for Custom Clock to Credit Conversion may evaluate the FA Hours for Individual Students which may be greater or less than the Total FA Hours configured on the Program Version and will Adjust Academic Years. Please see HELP or the Department of Education for further guidance.

7. In the **Expected Start Date** field, enter a low date only, a high date only, or both.

8. Click **Next** to view the students selected.
9. Click a student name and click a student folder to view the student information.
10. Click **Finish** to preform the data cleanup or cancel the process by clicking **Cancel**. Use the **Back** button to modify the selection criteria.

Student Pace Evaluation (SPE)

The Student Pace Evaluation tool evaluates a student's academic progress and determines whether the student's Financial Aid payment period and academic year dates, as well as expected graduation date or externship date, if applicable, need to be extended due to the lack of academic progress.

The Financial Aid and Housing sections tool are only applicable for students enrolled in non-term based programs that contain payment periods: programs configured with an academic calendar of Credit Hours without Term or Clock Hours.

To be gathered by this tool, a student must have a class scheduled. The tool uses the classes on a student's schedule to determine when the student will complete payment periods and academic years, and to set the graduation dates. If there are not enough classes scheduled, CampusNexus Student uses date add logic from the end date of the last class to calculate when the student will complete the expected number of credits to finish the payment period.

You can run the tool manually or schedule a job to run the tool automatically. When using the automated option, we recommend that you choose a time frame that does not interfere with daily operations.

Using the SPE tool, Financial Aid, Academic, Career Services, and Externship Advisors can do the following without having to first verify the accuracy of date information:

- Identify students who are ineligible to progress to the next payment period or academic year due to lack of academic progress.
- Extend students' payment period and academic year end dates when students are ineligible to progress to the next payment period.
- Correctly identify students who need exit interviews for financial aid.
- Prepare students for Externships.
- Prepare students for Career Searches.

The following assumptions apply:

- The academic year is defined for each program, including the credits/hours and weeks that make up a full academic year.
- The 'Total Credits for Externship' value defined for the Program Version includes the credits for any associated Externship.
- The Externship is taken after completing the classroom courses.
- The "Expected Hours per Week for Externship" will only be used in the graduation date calculation once the student is enrolled in an Externship course.
- A student cannot be registered into overlapping terms unless term sequencing is being used.

For more information on how CampusNexus Student analyzes and manages these program types, see Title IV Payment Periods. See also Graduation and Externship Date Calculations.

Only students in a program version that uses an Academic Calendar of Clock Hour, Credit Hours Without Terms, or Non-Standard Term populate information in the Academic Year, Payment Period, and Disbursement section. Students in standard term programs are only displayed in the enrollment section with projected graduation dates.

In the case where there is at least one class scheduled in the payment period(s), but there are not enough classes scheduled to complete a payment period, CampusNexus Student uses prorating logic to determine the end date of the payment period.

Note: If an updated FA Clock to Credit Conversion Rate (As of 7/1/2011) was added to the configuration, the SPE tool functionality that completes the Clock to Credit conversion, when needed, checks the enrollment date for the student and ensures the correct conversion rate is used to provide the proper adjustments to the dates on the Academic years for the student. This ensures that the proper progression is executed on the student.

If configured to do so, for non-term institutions (Academic Calendars 5 and 6), the Student Pace Evaluation tool can trigger the following automatic updates:

- The Origination Status of an originated Pell award is set from "Accepted" or "Batched to Send" to "Ready to Send" when the anticipated disbursement date of a Pell disbursement is updated by the Student Pace Evaluation tool. See COD Grants Setup.
- Origination change records are created when the Academic Year (AY) start/end dates, Loan Period (LP) start/end dates, or Disbursement dates are updated for a Direct Loan (DIRSUB, DIRUNSUB, and DIRPLUS) by the Student Pace Evaluation tool. See Direct Loan Setup.

Scheduled Complete Flag

For programs with credit or hour requirements, the SPE tool flags a payment period (PP) as “Scheduled Complete” in the database when enough courses are registered to complete the credits/hours of a PP. The SPE tool adjusts the final AY/LP for any extra credits/hours.

The Scheduled Complete flag is able to use courses in a scheduled, current, or completed status to determine if there are enough courses with credits that would potentially complete the payment period. If a course is completed, the grade posted must ‘earn the credits’ in order to utilize the credits or hours value of the course. The scheduled complete flag does not reference the IW milestone.

Complete Flag

The Complete flag is set when the system date is > than the IW milestone of a PP and there are enough credits/hours associated with grades that ‘earn the credits’ and/or meet the minimum grade points configured for the course requirement.

Applying the flags with ‘Disallow Rolling Credits’ disabled:

Academic Years:

In any payment period of an AY when ‘Disallow Rolling Credits’ is not enabled, the AYs progress at the rate defined in the FSA handbook. Therefore, Scheduled Complete/Complete flags for academic year PPs are set using cumulative counts (for the enrollment) of credits/hours for course work with an end date equal to or later than the SPE start date. No faster progression occurs with this setting.

Example:

For a 24-credit AY sequence utilizing 12 credit payment periods, CampusNexus Student would set the flags at 12, 24, 36, 48, etc., respectively. The PPs of the first AY sequence may contain 28 actual credits even though the AY only requires 24 (12 for each PP). The 4 extra credits and any extra weeks are counted toward completing the credit and weeks requirement of the next sequence.

Loan Periods:

The flags are applied using cumulative counts with in each loan period (LP). There is no carryover of extra credits/hours to the subsequent LP sequence.

Example:

For a 24 credit AY sequence utilizing 12 credit payment periods (PP), CampusNexus Student would set the flags at 12, 24|reset the counts| 12,24| reset the counts, etc., respectively. The PPs of the first LP sequence may contain 28 actual credits even though the LP only requires 24 (12 for each PP). The 4 extra credits and any extra weeks are not counted toward completing the credit and weeks requirement of the next sequence. Note that any extra credits/hours or weeks earned during the first PP of an LP sequence can carry over to the second PP of that sequence.

Applying the flags with ‘Disallow Rolling Credits’ enabled:

This setting allows the flags for AY PPs to mimic the logic used for LPs. The flags are applied using cumulative counts with in each loan period (AY). There is no carryover of extra credits/hours to the subsequent AY sequence.

Note that the AY/LP evaluation is triggered at the end of PP2 for each sequence to determine if there are any extra credits or hours earned during that sequence.

- When the Courses Exempt from Progression (CEFP) logic is enabled, courses flagged as 'Y' are used to determine the Scheduled Complete and Complete status. Clock hour programs use scheduled hours for current and scheduled courses and attended hours for completed courses.
- When the CEFP logic is disabled, current and scheduled courses always progress a student. If a course is completed, the SPE tool uses completed courses with a grade that earns the credits to determine the Scheduled Complete and Complete status. For hours-based programs, the attended course hours are used to determine the Scheduled Complete and Complete status. Scheduled hours are evaluated for scheduled and current courses.

During the final AY/LP, the Scheduled Complete flag can be set as a result of transfer credits being Approved. In this case, SPE reduces the duration of the final AY/LP and may attempt to remove a PP. If a PP cannot be removed, the AY/LP is not adjusted and a Contact Manager activity is created.

If PP2 has a disbursement, CampusNexus Student checks the setting of the 'Allow zero out extra AY/LP' option:

- If the option is selected, CampusNexus Student sets PP2 to zero (0).
- If the option is not selected, CampusNexus Student notifies you that the AY/LP could not be adjusted.

The Scheduled Complete flag is removed as a result of transfer credits being unapproved. In this case, SPE extends the final AY/LP.

The Scheduled Complete flag is not set or is removed on a student's AY and LPs when not enough courses are registered to complete the credits/hours requirement of that PP.

Title IV Eligibility

Payment periods that the student will not attend are flagged to indicate that the student is not eligible for Title IV funds during that payment period since the student will be unable to establish eligibility for Title IV funds.

The 'notEligibleforT4' flag is set to 1 for the following scenarios:

- A final non-zero credit payment period occurs with a credits milestone that is the same as a prior payment period (i.e., the student registered enough credits to complete the program version in the payment period prior to the final payment period). Use cases are AY/LP having 1 or 2 payment periods. Disallow rolling credits is disabled to create this data pattern for a final AY/LP with a single payment period.
- A zero credit payment period can occur when the flag to allow adjustment to 0 is enabled. See Allow zero out extra AY/LP under Setup > Campus Information > Financial Aid (tab). Extra payment periods that are unneeded, but cannot be removed due to constraints, are updated to have 0 credits/hours.

When the flag is set to 1, the Payment Period for Academic Year form displays the message: *"The system has calculated that the student will complete the program prior to this payment period. The student is not eligible for the TIV funds associated to this payment period."* For more information, see Payment Periods for Academic Year form.

You can configure an alert for a staff member when a payment period is flagged non-eligible for Title IV funds. For more information, see TIV Eligibility Alert under Setup > Campus Information > Financial Aid (tab).

Association between Courses and Payment Periods

For institutions that use the Student Pace Evaluator (SPE), CampusNexus Student can re-evaluate the association between registered courses and Payment Periods after the SPE has changed Payment Period dates so that courses are associated with the correct Payment Periods.

Re-association of courses and charges can occur in the following instances:

1. Registration and creation of pending charges in payment periods that will change after SPE executes.

- The registration of a course that has an end date in a future payment period and after SPE executes the credits for that course are needed to complete a more recent payment period. This change cascades through the subsequent payment period/course and charge associations.

2. Adjusting Payment periods due to dropped or failed courses.

- The actions (triggers) in this instance occur in a payment period and the payment period is extended to include a new course(s) and the associated charges for those courses. This change cascades through the subsequent payment period/course and charge associations.

3. Transfer Section

- This action can be performed at various times during the actions mentioned above.

4. Re-Entry > 180

- This process can create an overlap in AY/LP sequences and the associated payment periods. The PP sequences linked to an AY that starts prior to the Re-Entry > 180 date are no longer valid for associating with charges.

The logic for updating pending charges and ledger transactions should only be done for a configuration of the student's billing method that uses Payment Period Detail Billing and Revenue should only be updated if earning by transaction code over the course section.

Executing Student Pace Evaluation and Payment Period Billing Steps in Sequential Order Automatically

When the Student Pace Evaluation (SPE) job is used to update a student's academic progress along with payment period billing based on attendance, best practice is to run the following SQL jobs associated with the SPE and payment period billing in sequential order to ensure that the students are billed properly:

1. Autolock Payment Periods/Loan Periods
2. Recalculate the Graduation Date and Expected Externship Begin Date
3. Recalculate Payment Period Pending Charges
4. Process Payment Period Adjustments
5. Post Payment Period Pending Charges Based on Attendance

For institutions that do not want to manage these jobs individually, the SPE and Payment Period Billing job serves as a master job to run these jobs in the proper sequence. This master job checks if any of the individual jobs are enabled and disables them before running the corresponding steps within the master job.

Note: This master job is disabled by default, allowing institutions to decide when to replace their current job sequence.

Each step uses a SyRegistry key. Institutions can update the Registry keys to enable/disable certain steps.

SyRegistry Keys

	Step Name	Corresponding syRegistry Key Name
1	Autolock Payment Periods/Loan Periods_Step1	xxADFAExecuteAutoLockStep
2	Recalculate the Graduation Date and Expected Externship Begin Date_Step2a, 2b, 2c	xxADFAExecuteSPEStep
3	Recalculate Payment Period Pending Charges_Step3	xxSAExecuteRecalculatePPPendingChargesStep
4	Process Payment Period Adjustments_Step4	xxSAExecutePPAdjustmentsStep
5	Post Payment Period Pending Charges Based on Attendance_Step5	xxSAExecutePostPPPendingChargesStep

The master job default frequency is daily starting at midnight.

Prorating Logic

CampusNexus Student uses the following logic to determine the end date of the payment period.

1. First, calculate the number of days needed to complete the current courses (scheduled, current or complete) in the payment period. This is calculated by counting the number of days between the Payment Period start date and the end date of the last current course (add more days to factor in holidays as needed).
2. Calculate the number of credits/hours still needed to complete the payment period by subtracting the credits/hours of the current courses in the payment period from the total number of credits/hours required for the payment period.

The prorating is calculated as follows:

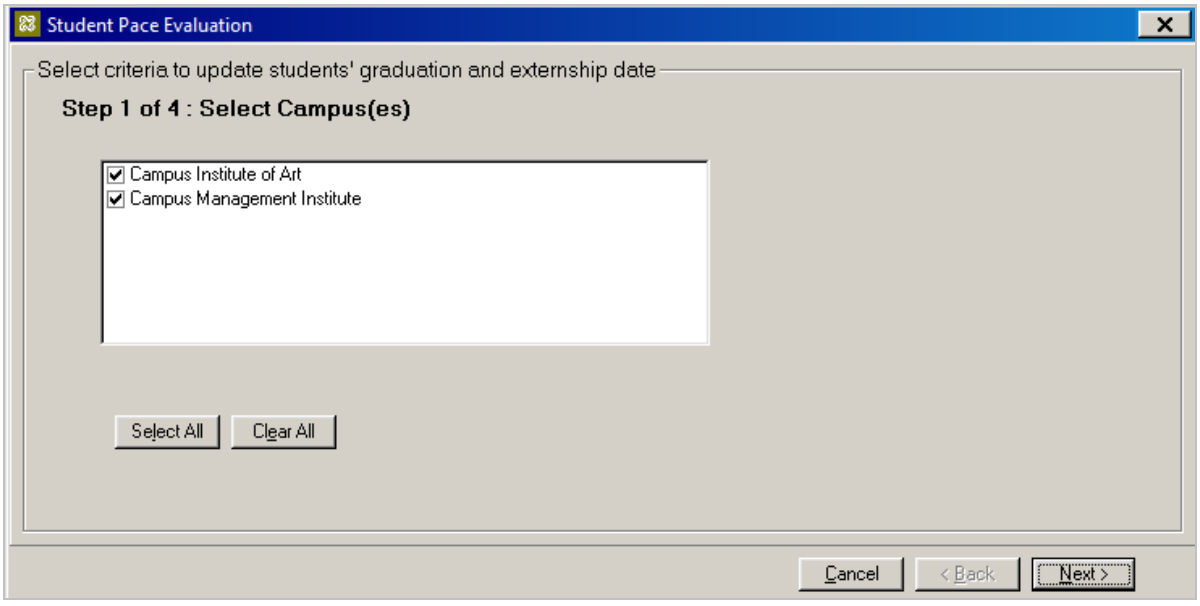
- Number of days to extend = (number of days calculated in Step 1 * number of credits/hours calculated in Step 2) / (number of credits/hours of current courses in the payment period)
- Add the number of days calculated previously to the end date of the latest current course (Scheduled, completed, current). The new date calculated is the end date of the current payment period.
- Add 1 day to this new end date, and this is the start date of the next payment period. The end date of this next payment period is calculated by using the start date and the number of weeks in the payment period. This process is repeated for subsequent payment periods.

Note 1: When a course overlaps non-term payment periods, i.e., the courses began in the first payment period and ended in the second payment period, weeks and credits associated with the overlapping courses are counted toward completion of the second payment period and the second payment period end dates are adjusted accordingly.

Note 2: When "Allow courses to be exempt from progression" is enabled, CampusNexus Student uses Instructional Weeks (IW) projection to determine both milestone dates on the payment period if there are not enough courses scheduled to complete the payment period. The exception to the rule is that if the IW milestone has been met; however, the hours or credits requirement has not, CampusNexus Student uses prorating to determine how long it will take the student to complete the requirement. Subsequent payment periods not covered by scheduled course work continue to use Instructional Week projection.

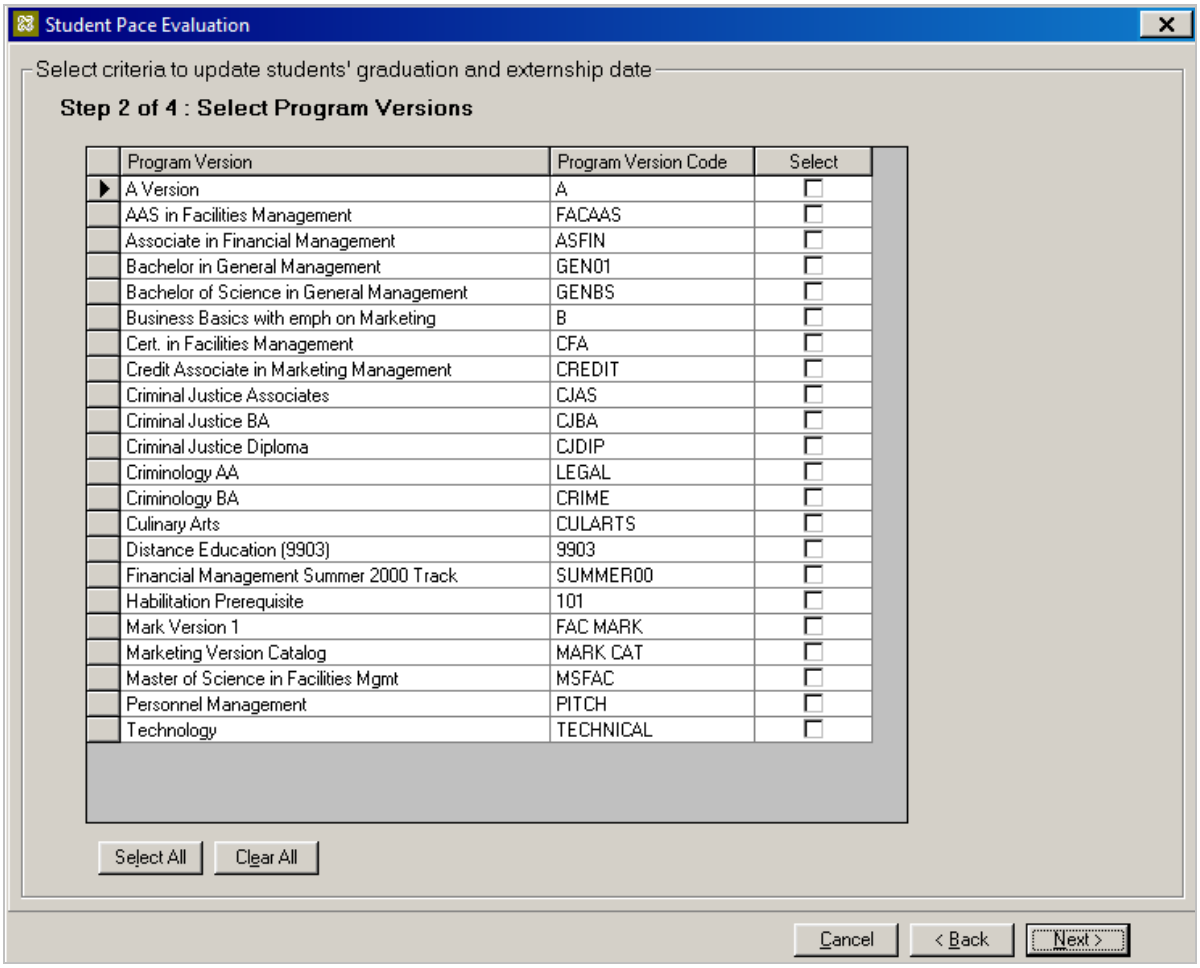
Updating Graduation and Externship Dates

1. Navigate to **Tools > Academic Records > Student Pace Evaluation**. Step 1 of 4: Select Campuses of the Student Pace Evaluation (SPE) tool is displayed.



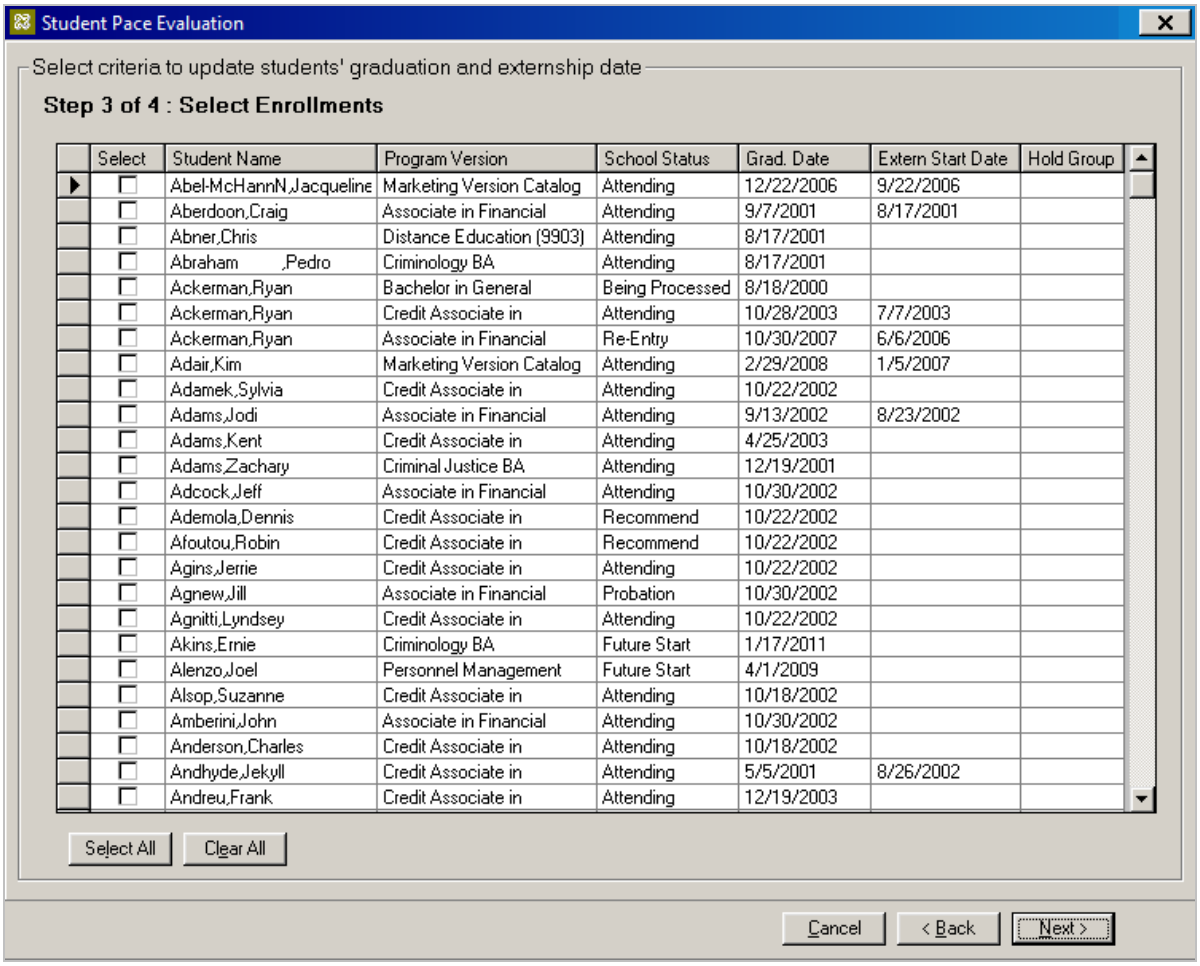
2. Select the applicable Campus(es) from the **Campuses** list. Use **Select All** or **Clear All** to select or clear *all* check boxes in the list. Click **Next**.

Step 2 of 4: Select Program Versions of the SPE tool is displayed.



3. Indicate the applicable **Program Version**(s) by selecting the check box(es) on the corresponding grid rows. Use **Select All** or **Clear All** to select or clear *all* check boxes in the list. Click **Next**.

   Step 3 of 4: Select Enrollments of the SPE tool is displayed.



Select	Student Name	Program Version	School Status	Grad. Date	Extern Start Date	Hold Group
☐	Abel-McHannN,Jacqueline	Marketing Version Catalog	Attending	12/22/2006	9/22/2006	
☐	Aberdoon,Craig	Associate in Financial	Attending	9/7/2001	8/17/2001	
☐	Abner,Chris	Distance Education (9903)	Attending	8/17/2001		
☐	Abraham ,Pedro	Criminology BA	Attending	8/17/2001		
☐	Ackerman,Ryan	Bachelor in General	Being Processed	8/18/2000		
☐	Ackerman,Ryan	Credit Associate in	Attending	10/28/2003	7/7/2003	
☐	Ackerman,Ryan	Associate in Financial	Re-Entry	10/30/2007	6/6/2006	
☐	Adair,Kim	Marketing Version Catalog	Attending	2/29/2008	1/5/2007	
☐	Adamek,Sylvia	Credit Associate in	Attending	10/22/2002		
☐	Adams,Jodi	Associate in Financial	Attending	9/13/2002	8/23/2002	
☐	Adams,Kent	Credit Associate in	Attending	4/25/2003		
☐	Adams,Zachary	Criminal Justice BA	Attending	12/19/2001		
☐	Adcock,Jeff	Associate in Financial	Attending	10/30/2002		
☐	Ademola,Dennis	Credit Associate in	Recommend	10/22/2002		
☐	Afoutou,Robin	Credit Associate in	Recommend	10/22/2002		
☐	Agins,Jerrie	Credit Associate in	Attending	10/22/2002		
☐	Agnew,Jill	Associate in Financial	Probation	10/30/2002		
☐	Agnitti,Lyndsey	Credit Associate in	Attending	10/22/2002		
☐	Akins,Ernie	Criminology BA	Future Start	1/17/2011		
☐	Alenzo,Joel	Personnel Management	Future Start	4/1/2009		
☐	Alsop,Suzanne	Credit Associate in	Attending	10/18/2002		
☐	Amberini,John	Associate in Financial	Attending	10/30/2002		
☐	Anderson,Charles	Credit Associate in	Attending	10/18/2002		
☐	Andhyde,Jekyll	Credit Associate in	Attending	5/5/2001	8/26/2002	
☐	Andreu,Frank	Credit Associate in	Attending	12/19/2003		

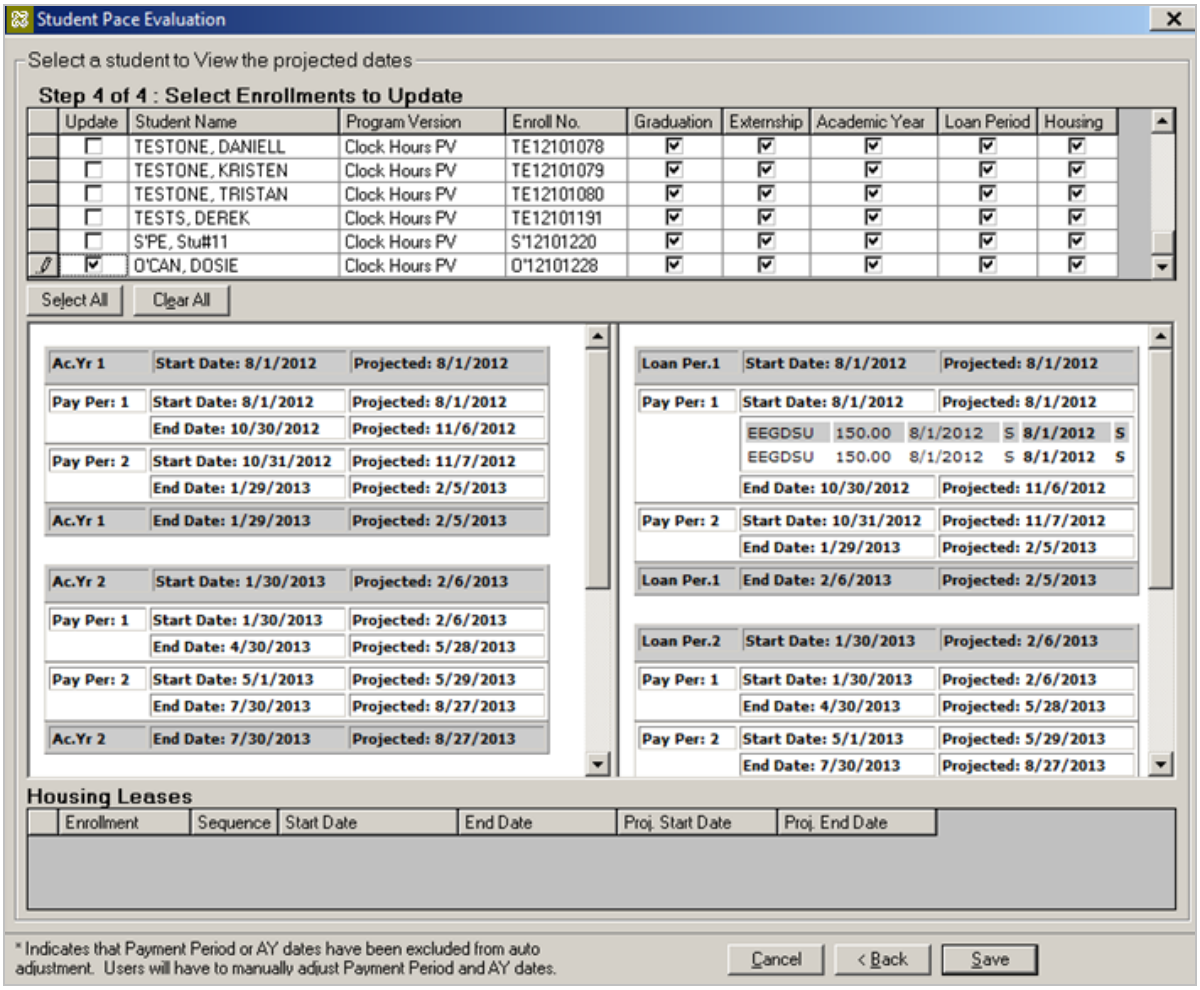
4. **Select** the check box for the student(s) you would like updated. Use **Select All** or **Clear All** to select or clear *all* check boxes in the list. Click **Next**.

   Step 4 of 4: Select Enrollments to Update of the SPE tool is displayed. It shows a list of selected students along with the projected dates for the Graduation Date, Externship Date, Academic Year Dates, Payment Period Dates, and Disbursement Dates that would change as the result of a student's progress in the chosen program.

5. **Select** a record in this grid to display the information in the lower grids. Select the **Update** check box to allow the record to be updated.

   The preview pane on the left lists academic years, the right pane displays loan period information. If there are loan periods associated with the award, it is displayed in the loan period pane; however; if no loan periods are associated, it is displayed in the academic year pane. The listing is either/or and will not show both at once.

   Note: Only enrollments with payment periods display academic year, payment period, and disbursement information.



Academic Years: This grid contains the academic years for the enrollment selected in the top grid. The grid also shows the current start and end dates along with the projected new dates. The selected record determines which payment periods are displayed in the Payment Periods grid.

Loan Periods: This grid contains the Loan Periods for the enrollment selected in the top grid. The grid also shows the current start and end dates along with the projected new dates. The selected record determines which payment periods are displayed in the Payment Periods grid.

BBAY Dates: This grid contains the BBAY Start and End Dates for the enrollment selected in the top grid. The grid also shows the current start and end dates along with the projected new dates. During SPE evaluation, if a student fails to progress as expected, this may cause the student's Loan Period to be extended. Should the Loan Period be extended, SPE will make the corresponding adjustments to the BBAY Start and End Dates by extending the BBAY Start and End Dates by the same number of days that the Loan Period Start and End Dates are extended. When the student has a stub loan period, the SPE evaluation will not adjust the BBAY start date. Also, if any adjustments made due to course progression, the Loan Period and the BBAY End Date will not be adjusted prior to the NSLDS End date on the stub loan period. For the Loan Period and BBAY dates to be adjusted by the SPE evaluation process, the Title IV Loan configuration must be enabled on the SPE settings and checked at the time of SPE evaluation.

Payment Periods: This grid contains the payment periods for the selected academic Year. The grid also shows the current start and end dates along with the projected new dates. Select a payment period to display any disbursement dates in the Disbursements grid.

Additionally, Payment Period dates will be flagged (*) if the manual Override Payment Period has been selected for the student. A caption noted with an asterisk * will appear at the bottom of each step of the SPE tool to indicate that the Payment Period dates have been excluded from auto adjustment and users will have to manually adjust the Payment Period and AY dates.

Note: The Academic Years and Payment Periods are updated based on the definition of instructional weeks as specified by the Department of Education (ED). The instructional weeks logic includes the weeks from failed courses and weeks from a dropped course prior to the drop date (by default). It does not include weeks while the student is on a leave of absence (LOA).

Outlined below are some of the general rules that CampusNexus Student follows when creating payment periods:

- When initially creating academic years and payment periods, CampusNexus Student uses instructional weeks to determine the actual dates based on the weeks attribute.
- The Start Date for Sequence 1 of a payment period sets the start date for the instructional weeks block for the enrollment.
- The initial payment period Start Date is aligned with the Program Version's Start Date

Rules for subsequent payment period start dates:

CampusNexus Student sets the Start Date to the day after the prior payment period's End Date in either of the following cases:

- If the first course in the subsequent payment period starts before the end date of the prior payment period,

  - OR -

- If the check box to align payment periods to course start and end dates is cleared (see Student Pace Evaluation Settings).

If these conditions are not met, CampusNexus Student sets the start date to the next course's start date, or the check box to align payment periods to course start and end dates is selected (see Student Pace Evaluation Settings).

Rules for payment period end dates:

The end dates are set to a point in time where both the "weeks" and "credits"/"hours" payment period attributes are satisfied. CampusNexus Student shows visibility into the dates calculated by displaying milestone dates of when the student will satisfy the attributes of the payment periods. The logic will take the greater of the two milestone dates and set the end date of the payment period to that date when the flag to align payment period to course start and end dates is cleared. If the check box to align payment periods to course start and end dates is selected, CampusNexus Student finds the course that encompasses the greater of the two milestone dates and sets the payment period end date to that date.

Note: A payment period can never end on a holiday configured in the Calendar set up in CampusNexus Student (**Lists > Academic Records > Calendar (tab)**). The End Date is always the day after the holiday ends.

Note: When SAP is executed by Payment Period End Date for clock hour programs and the institution has an excused absence policy, the excused absence policy is accounted for and incorporated.

Note regarding Payment Periods and Student Pace Evaluation (SPE) logic:
There is a difference in the calculations if the institution is configured to use Global as a servicer. See Title IV Payment Periods for more information.

Disbursements: This grid displays disbursements from the selected payment period if the date or the status is projected to change.

The disbursement dates for scheduled and ready to pay disbursement are moved the same number of days as the start date unless a disbursement would be moved outside of the payment period. If the previous logic would place a disbursement outside of a payment period then the system will apply the following rules:

- If the current system date is prior to the payment period start, then set the 1st disbursement to the start date and an additional disbursement to the midpoint.
- If the current system date is during the payment period, then set the 1st disbursement to the start date and an additional disbursement to the later of the midpoint or current system date.
- If the current system date is greater than the payment period end, then set the 1st disbursement to the end date of the payment period.

This record includes the amount of the packaged award, the disbursement number, the disbursement amount, the current and projected disbursement dates, and the current and projected disbursement status.

Note: CampusNexus Student marks Title IV grant disbursements as Canceled if the payment period (with which the disbursement is associated) start date or the disbursement date is adjusted by the SPE tool to fall after the end of the award year, i.e., after June 30 of the award year. In the case of Pell, ACG, SMART, and SEOG grants, the payment period start date is considered when determining whether disbursements will be canceled; for Perkins loans, which are campus-based loans that follow similar regulations as Title IV grants, the disbursement date is considered when determining whether disbursements will be canceled. When a disbursement is canceled on this basis, CampusNexus Student updates the award amount accordingly.

If the change is made by the SPE tool job, CampusNexus Student assigns SPE TOOL AUTO USER as the user who canceled the disbursement. If the change is made by running the SPE tool through the Tools menu, CampusNexus Student records the User ID of the user who runs the SPE tool as the user who canceled the disbursement.

If configured to do so, SPE can cancel a direct loan or any remaining scheduled disbursements of the direct loan:

- When the SPE update causes the loan's BBAY start date to be later than the Award Year's end date.

  - OR -

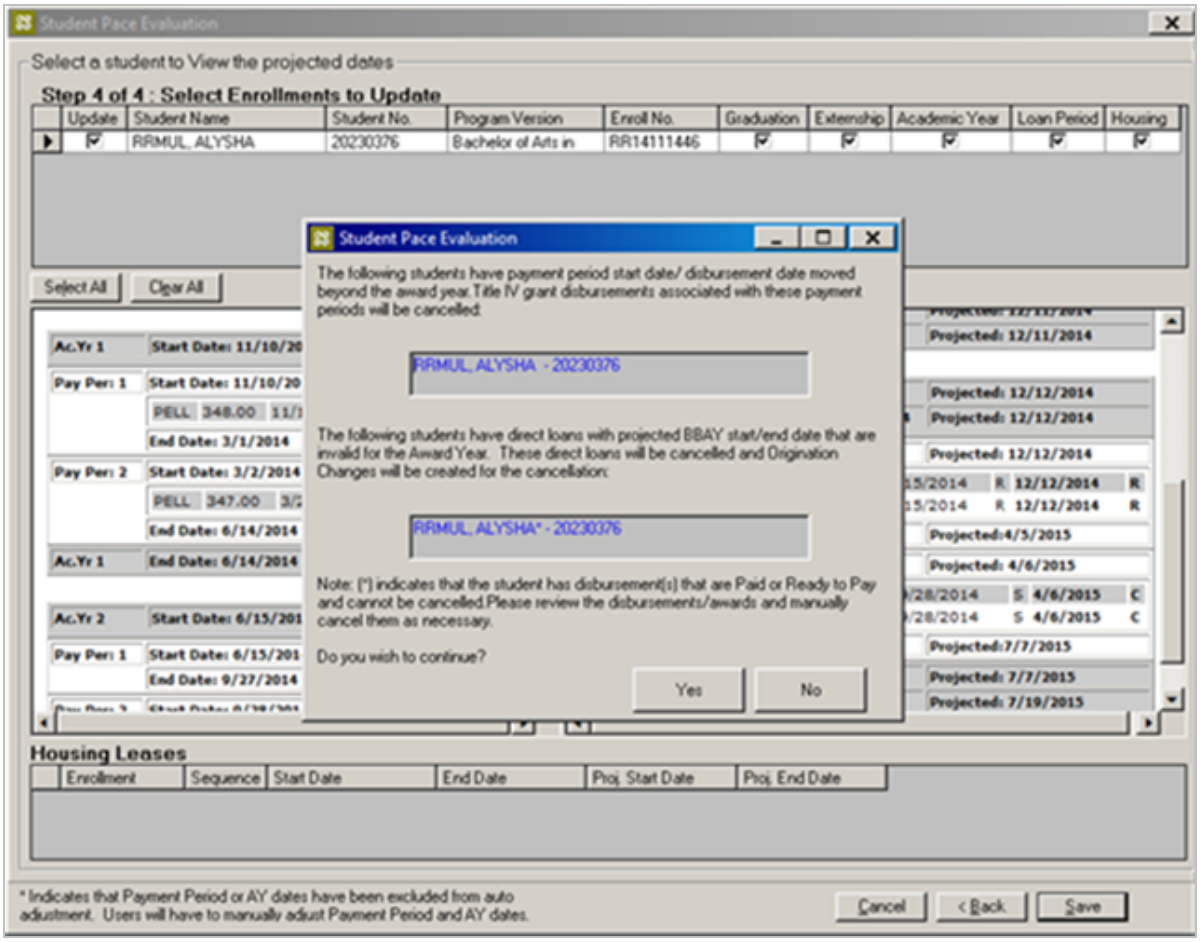
- When the SPE update causes the BBAY end date to be earlier than the Award Year's start date.

To configure this option, select Yes for "*Cancel loan when loan dates are invalid?*" in the Direct Loan Setup form. For the direct loans that cannot be cancelled due to Paid or Ready to Pay disbursements, CampusNexus Student cancels all remaining scheduled disbursements. Direct loan disbursements that will be cancelled are displayed on the SPE user interface with the Projected Status as 'C' (Cancelled). Additionally, CampusNexus Student automatically creates origination change records for the cancelled loan if the loan is eligible for origination changes. For this to occur the Origination Status must be 'Accepted' or 'Batched to Send', and the configuration '*Auto Create Orig. Changes/Adjustments for cancelled disbs/refunds?*' option in the same Direct Loan Setup form option must be set to Yes. CampusNexus Student also creates Origination Changes for the cancellation if the *Auto create Orig. Changes/Adjustments for canceled disbs/refunds?* option in the same Direct Loan Setup form option is set to Yes.

Note: When a loan or remaining scheduled disbursements of a loan are cancelled by the SPE due to invalid loan dates, the loan's dates at the loan level (the loan period and BBAY start and end date as well as disbursement dates) are not updated to the projected invalid dates. This ensures that the origination changes for the cancellation pass loan dates validation during Export to COD.

Additionally, you can configure CampusNexus Student to notify a staff member when a direct loan is cancelled or cannot be cancelled by SPE. See Auto Update Alert on the Financial Aid tab of the Campus Information form.

Before updating the students' data, the SPE tool will notify you if there are students who have Title VI grant disbursements or direct loans to be cancelled as a result of the update. This alert also indicates students whose Title IV grant disbursements and/or loans that cannot be cancelled due to Paid or Ready to Pay disbursements. You can decide whether to proceed.



Housing Leases: This grid displays student leases with a Housing Period of Academic Year that can be updated by the tool. For each lease, the enrollment, sequence number, current lease start date, current lease end date, projected lease start date, and projected lease end date are displayed.

Note: When a student's lease is updated with new academic year dates, CampusNexus Student checks if the room is available for the new dates. If the room is occupied by another student on the new dates, the lease will be extended for the student currently occupying the room and the other student's lease will be marked as pending. The Lease Exception report may then be used to identify students with pending leases who will have to be assigned new accommodation.

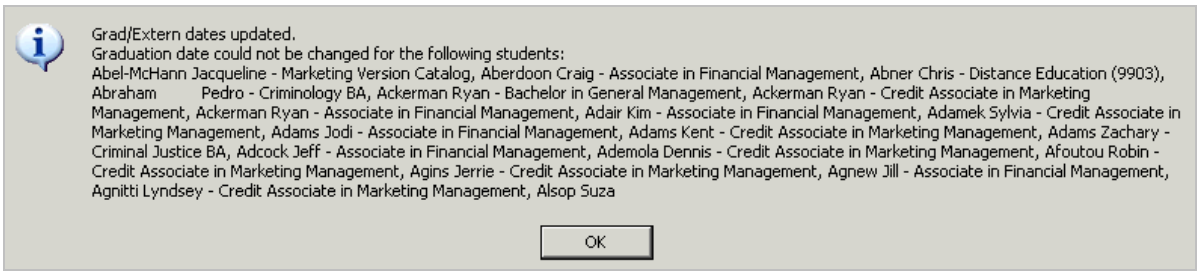
LOA Students: Leave of Absence (LOA) students are gathered in the tool and dates adjusted using the expected return date for Academic Calendars that contain payment periods. If the student does not return on or before the expected return date, CampusNexus Student continues to adjust the dates each time the tool is run. If a student is placed on LOA after completing payment period 1 in an academic Year but before completing any credits/hours in the next payment period, the start date of the payment period is adjusted to the return date from LOA.

6. Select **Save** to save your changes, **Cancel** to discard your changes, or **Back** to return to the previous screen.

   Upon clicking **Save**, if any Title IV grant disbursements for the selected student(s) are subject to cancellation (see Disbursements above), CampusNexus Student displays a warning message listing the students for whom disbursements are about to be canceled and asking if you would like to continue.

   If you click **Yes**, CampusNexus Student continues to update the payment period dates, academic year dates, and graduation dates, cancels the indicated disbursements, and updates the total award amounts for the selected enrollments.

7. A message notifies you that the graduation/externship dates have been updated and lists any exceptions. Click **OK** to close the message.



Transfer Enrollment Settings for Payment Period Logic

When the transfer enrollment process is performed on students in Program Versions that use payment periods, select the logic to transfer the start date and the academic Year information or to not transfer the start date and academic Year information. This setup is found under **Setup** > **Campus Locations** > **Transfer Opt.** tab. The check box to transfer the start date and academic Year information can be selected independently of each other; however, you should not select one without the other as the SPE tool logic needs these to be synchronized for the tool to work correctly.

When the start date is transferred during an enrollment transfer with a program version configured for non-term, the Financial Aid will be transferred to the new enrollment. Selecting the start date to transfer is a trigger for CampusNexus Student to allow the Financial Aid to move to the new enrollment. You must validate the rules below as designated by the Department of Education as CampusNexus Student currently does not have a rules engine to determine these validations.

You may consider a student who transfers from one program to another at your institution to remain in the same payment period if all of the following conditions apply:

- The student is continuously enrolled at your institution.
- The coursework in the payment period the student is transferring out of is substantially similar to the coursework the student will be taking in the program into which he/she is transferring.
- The payment periods are substantially equal in length in weeks of instruction and credit or clock-hours.
- There are few or no changes in institution charges associated with the payment period.
- The credits from the payment period the student is transferring out of are accepted for credit in the new program.

When the start date is not transferred during an enrollment transfer, Financial Aid will not be moved to the new enrollment.

Course Retake Logic for Non-Term Programs within the Student Pace Evaluation Process

The logic of the SPE tool for non-term programs does not consider course retakes in which credit has previously been earned in the payment period, academic year, and graduation date calculations. In other words, a retaken course where credit has previously been earned is not used to start or end payment periods or academic years. Additionally, the credits earned on the retake instance are not included when calculating whether the student has met the credits required to progress to the next payment period or academic year. For students in non-term programs, the expected graduation date is updated based on the projected academic year dates, so the payment period and academic year logic affects the expected graduation date accordingly.

Example 1: Retake after failing the course and not receiving credit

Program Length: 24 credits and 30 weeks

Academic Year: 24 credits and 30 weeks

Payment Periods: 2 payment periods, each 12 credits and 15 weeks (1-12 credits and 13-24 credits)

Each payment period consists of three courses at 4 credits each. The student passes two courses and fails the third (student does not earn the credit for the course). The student must retake the course to have successfully completed the 12 credits defined for the payment period. Once the student has successfully passed the retaken course, the student progresses to the next payment period as long as the weeks part of the payment period definition has been met. Until the student successfully completes the retaken course (assuming they retake the course immediately after the first instance,) the student is considered to remain in the first payment period.

Example 2: Retake after passing the course and receiving credit

Program Length: 48 credits and 60 weeks

Academic Year: 24 credits and 30 weeks

Payment Periods: 2 payment periods, each 12 credits and 15 weeks (1-12 credits and 13-24 credits)

Each payment period consists of three courses at 4 credits each. The student passes all three courses but needs to retake one of the courses to receive a better grade. The student has already received credit for the first payment period based on the coursework assigned to that payment period (the earned credit from the retaken course has been included) and 15 weeks have elapsed. The student is considered to have completed the first payment period and, if all other eligibility requirements have been met, may receive a Title IV disbursement for the subsequent payment period. Although the institution may charge the student for retaking the course, the student may not receive a Title IV payment for this course again. In addition, the course retake is not considered for determining the credits successfully completed in the subsequent payment period. For example, since the program length in this example is 48 credits, this retaken course would not count when determining whether the student progresses from the 13-24 credit payment period in the first academic year to the 25-36 credit payment period in the second academic year.

Impact of SPE on Overlapping Loan Periods

The SPE tool does not update loan dates for a stub loan period so that the stub loan period truly reflects the student's overlapping loan period and correctly shows the student's progress in subsequent loan periods. For programs configured with Academic Calendar 5 and 6, changes to the student's schedule (e.g., course registration, unregistration, course association, reassignment of courses, and posting of pass, fail, CLEP, and transfer final grades) do not affect the following dates of the stub loan period:

- LP end date
- BBAY start and end date
- Loan end date of any direct loans associated with the stub loan period
- BBAY start and end date of any direct loans associated with the stub loan period
- Disbursement dates of any direct loans associated with the stub loan period

Dates for subsequent LPs continue to be updated using current SPE logic.

The SPE tool applies *Scheduled Complete* or *Completed* flags to overlapping loan payment periods (LPPs) for all programs configured with Academic Calendar 5 and 6 using the logic below:

- LPPs of the stub loan period are flagged as Schedule Complete when enough credits/hours are registered.
- LPPs of a stub loan period are flagged as Completed when all courses that end within the LPP have final grade posted.

LPPs of the subsequent LPs are marked as Schedule Complete or Completed using standard SPE logic.

When the last LPP of the stub loan period is marked as *Scheduled Complete* or *Completed*, the SPE tool updates the following values for the stub loan period and rebuilds subsequent LPs to reflect the true remaining credits/hours and instructional weeks needed to complete the program:

- The number of credits/hours of the stub loan period is updated to the total number of credits/hours of Scheduled Complete / Completed courses that have the end date within the stub loan period's date range.
- The number of weeks in the stub loan period is updated with the calculated number of instructional weeks of all the Scheduled Complete / Completed courses that end within the stub loan period's date range.
- The attributes of the payment periods of the stub loan period are updated based on the updated credits/hours and weeks of the stub loan period.

The SPE uses the course expected end date or actual end date to determine if the course falls within the overlapping period. This allows the SPE to calculate and update the correct attributes for the overlapping loan period when the LP is Scheduled Complete / Completed. To update the attributes of the PP during Scheduled Complete / Completed the LP's credits/hours are divided in halves (if there are two LPPs) for each LPP.

Note: In some scenarios, the stub loan period's credits/hours are updated as a result of Scheduled Complete/Completed and the new attributes require the LPP of the stub loan period to be removed or added. For example, the stub loan period was originally created with credits/hours that are more than half of the full AY definition and therefore two LPPs were created. When setting the Scheduled Complete / Completed flag for the LPPs of the stub loan period, CampusNexus Student calculated the actual credits/hours Scheduled Complete/Completed and updated the credits/hours and IWs for the stub loan period accordingly. However, the new credits/hours attribute of the stub loan period is less than half of the full AY definition and therefore the stub loan period should have only one LPP. In this scenario, the removal of the second LPP of the stub loan period must be manually removed and the first LPP should be updated accordingly.

Graduation and Externship Date Calculations

Use the Student Pace Evaluation tool to update graduation and externship dates, or run SQL jobs to do these processes without using the CampusNexus Student user interface (UI).

Automated Updates

Institutions must configure a service broker and a SQL job if they want to bypass the CampusNexus Student UI to calculate changes to dates for non-term based students. Institutions would only need the SQL job if they use only term-based program configurations.

The service broker contains logic for non-term configurations that calculates milestone dates for each payment period in a 'Near Real Time Calculation' by calling the following stored procedure for students in non-term programs:

- `sproc_student_AcademicRecords_StudentPace_Evaluator_Dates`

  The job contains logic that gathers Term students to adjust the Grad date, Extern Date by calling the following stored procedure:

- `sproc_Student_Academics_GradDateExternShipDate_Update`

  The job also contains logic that uses the milestone dates for non term students to adjust the Grad date, Extern Date, Academic Years, Loan Periods, Payment Periods and disbursements by calling the following stored procedure:

- `sproc_student_AcademicRecords_StudentPace_NightlyJob`

Manual Updates

Institutions can manually update graduation and externship dates by using the Student Pace Evaluation tool under Tools > Financial Aid > Student Pace Evaluation or Tools > Academic Records > Student Pace Evaluation. CampusNexus Student calls the stored procedures listed above as needed for students gathered in a the adjustment batch. This tool is meant for small batch corrections and not handling the day to day processing of an institution's population.

Step 1: Calculate the Duration of the Remaining Classroom Time

The duration of the remaining classroom time is calculated by using the remaining terms to map out the end date of the last term of classroom time for each student. The calculation is the same for students with or without externships.

Remaining Terms = Remaining Classroom Credits/Expected Credits per Term, rounded up to the next whole number

Remaining Classroom Credits = (Total Credits for Program Version + Total Credits from Associated Areas of Study) - Total Credits for Externship - Credits Earned - Credits Currently Taking

Note: Credits for a course need to be counted only once. If a course satisfies an Area Of Study (AOS) requirement and a Core course requirement for the Program Version, the credits for that course are reflected in the Total Credits for the Program Version and the Required Credits for the AOS. The business rules, therefore, count those credits for the course only once.

Total Credits for Externship = Total Credits for Externship of the Program Version.

Credits Earned = Total Credit Value of courses at a Status of Complete and course type is not externship.

Credits Currently Taking = Total Credit Value of courses at a Status of 'Scheduled' or 'Current' and course type is not externship.

Example A

Field	Value
a) Program Version Credits	130

Field	Value
b) Total Credit from AOS	50
c) Credits common to both Program Version Credits and Total Credits for AOS	10
d) Total Credits for Externship	30
e) Credits Earned	100
f) Credits Currently Taking	16 (4 Scheduled courses at 4 Credits Each)
g) Expected Credits per Term	10 (of Enrollment)
h) Current Term Dates	0527 (07/10/2006 - 09/23/2006)
Remaining Terms = Remaining Classroom Credits/Expected Credits per Term, rounded up to the next whole number	= ((a + b) - c - d - e - f) / g
	= ((130 + 50) - 10 - 30 - 100 - 16) / 10
	= 24 / 10
	= 2.4
	= 3 terms

Duration of Remaining Classroom Time

Using the result of the calculation for remaining terms above, calculations for the End Date of the Last Terms need to be verified if Term Sequencing and/or Term Relationship are used.

If the student is registered into a Program Version with Term Sequencing, the list of future terms is already be planned out for the student. In these circumstances, the End Date of the Term that is listed third following the current term will be the Date to be used as the basis for further calculation. If Term Relationships are used, only the Parent Terms will be considered.

If Term Sequencing is not used, the terms are sorted such that the Start Dates fall after the End Date of the Current Term's End Date as shown below. If Term Relationships are used, only the Parent Terms will be considered.

Using Example A above, and assuming that the campus is not using Term Relationships, CampusNexus Student calculates the End Date of the Remaining Terms as follows:

1. Beginning with the End Date of the 0527 term, the student's Current Term, the Next Term following that End Date is located, which is the 0531 term (10/10/2006 - 12/23/2006).
2. Locate the Next Term following the End Date of the Term in #1, which is the 0545 term (01/16/2007 - 03/31/2007).
3. Locate the Next Term following the End Date of the Term in #2, which is the 0550 term (04/16/2007 - 06/30/2007)

Step 2: Calculate the Duration of Remaining Externship Time

This step is performed only when an externship course is associated with the student's enrollment. The calculation of the Graduation Date and Externship Start Date for students with an externship is based on the Duration of the Remaining Externship Time calculation result.

Remaining Externship Weeks= (Total Hours for Externship - Hours Already Recorded for the Student)/Expected Hours per Week for Externship, rounded up to the next whole number

Total Hours for Externship

This value varies depending on whether the student has scheduled/started his externship course.

If the student *has not* started his externship course (i.e., if the enrollment has no externship/internship course with 'Current' or 'Scheduled' status), the Total Hours for Externship is equivalent to the value in the new 'Total Hours for Externship' field.

If the student has started his externship course (i.e., if the enrollment has one or more externship/internship course(s) with 'Current' or 'Scheduled' status), the Total Hours for Externship is the sum of hours associated with the externship course(s) of the student that has a status of 'Scheduled' or 'Current'.

Hours Already Recorded for the Student

This is the Minutes Attended for the courses of type 'Externship' and Status of 'Current' or 'Scheduled'.

Expected Hours per Week for Externship

This is the value stored in the 'Expected Hours Per Week Of Externship' field for the enrollment. If the field is blank, the Program Version's 'Expected Hours Per Week For Externship' value are used.

Example B

Field	Value
a) Total Hours for Externship	125
b) Externship Hours Already Recorded for Student	30
c) Expected Hours per Week for Externship	15
Remaining Externship Weeks = (Total Hours for Externship - Hours Already Recorded for the Student)/Expected Hours per Week for Externship, rounded up to the next whole number	= (a - b)/c
	= (125 - 30)/15
	= 95/15
	= 6.3
	= 7 weeks

Calculating the Graduation Date

The following occurs when the Expected Externship Start Date and Graduation Date are calculated:

- When the student does not have an externship

  If no course of type externship/internship resides on the Enrollment Schedule, CampusNexus Student defines the Student as not having an externship, the Expected Externship Start Date is set to NULL, and the Last Term's End Date is calculated using Step 1 above.

- When the student has an externship that has already started, the Expected Externship Start Date is not calculated.

  If one or more courses of type externship/internship exists on the Enrollment Schedule with a status of Current, Completed, or LOA, or Attendance has already been posted, the Externship Start Date is not updated for the respective enrollment, the Expected Externship Start Date is not updated, and the Graduation Date will equal the Last Term End Date plus the 'Duration of remaining Externship Time' value.

- When the student has an externship that has not yet started, the Expected Externship Start Date is calculated

If one or more courses of type externship/internship exists on the Enrollment Schedule, and none of the statuses are Current or Completed or LOA, or none have Attendance posted yet, the Externship Start Date is updated for the respective Enrollment. The Expected Externship Start Date is set to the Last Term End Date, and the Graduation Date will equal the Last Term End Date plus the 'Duration of remaining Externship Time' value.

Using the information in Step 1 and Step 2 above, calculations for the Externship Start Date and Graduation Date for our Example A and Example B can be updated.

Example A

This student does not have an externship, therefore Externship Start Date = NULL, and Graduation Date = End Date of the fourth term or 06/30/2007.

Example B

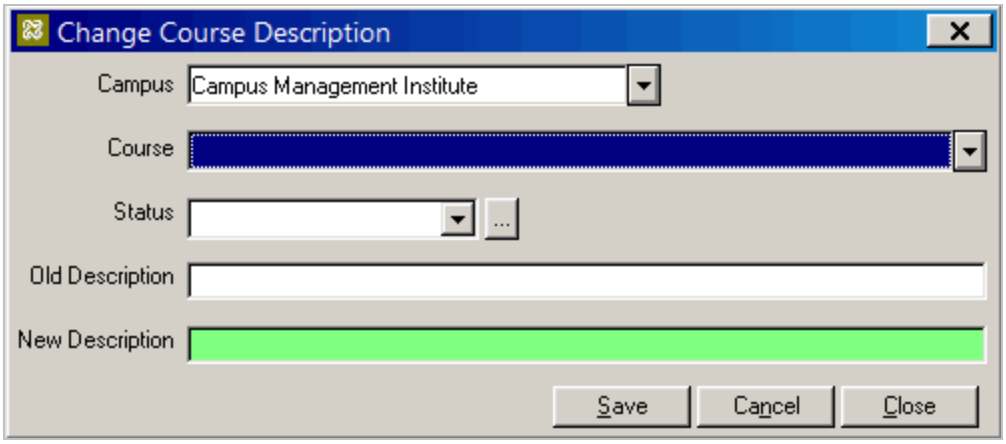
This student has an externship, and none of the externship courses have a status of Current, Scheduled, or Future. Assume that the End Date for the Student's Last Term according to the calculated Duration of Remaining Classroom Time is the same as Example A's value of the same name. Then, the Externship Start Date = 06/30/2007, and the Graduation Date = 06/30/2007 + 6 weeks or 08/17/2007.

Change Course Description

Use this tool to modify the description for a course and to have the change cascade for the selected campuses including courses that already have students registered.

To change a course description:

1. Navigate to **Tools > Academic Records > Change Course Description**. The Change Course Description form is displayed.



2. Select a **Campus**. If the change applies to all campuses, select **All Campuses**.
3. Select the **Course**.
4. If the change is for a specific status, select all statuses that apply from the **Status** list.
5. The existing description is displayed in the **Old Description** field.

   Specify the new course description in the **New Description** field.
6. Click **Save**. Confirm that you want to proceed.

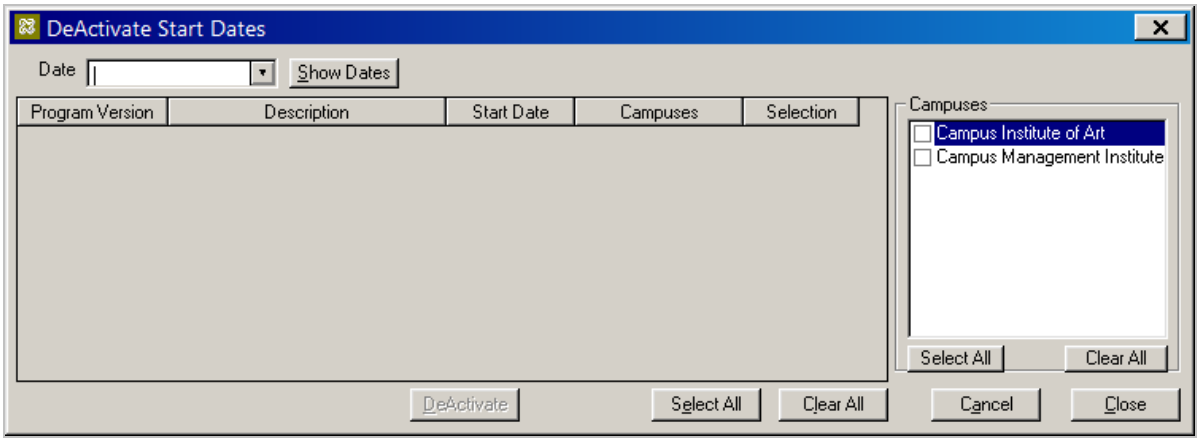
   When the change is implemented, the following message is displayed: *Successfully updated. Do you want to update more courses?*
7. Click **Yes** to update more courses, or click **No** to close the form.

Deactivate Start Dates

Use this tool to deactivate a batch of past program version start dates instead of having to create and submit a script. This tool returns a listing of program versions with start dates that occur on or before the search date selected, the campuses associated with each program version found (only campuses which have been selected in the Campuses list will be listed), and the start dates associated with each program version found. You can then select multiple start dates from and deactivate them for all selected campuses.

To deactivate start dates:

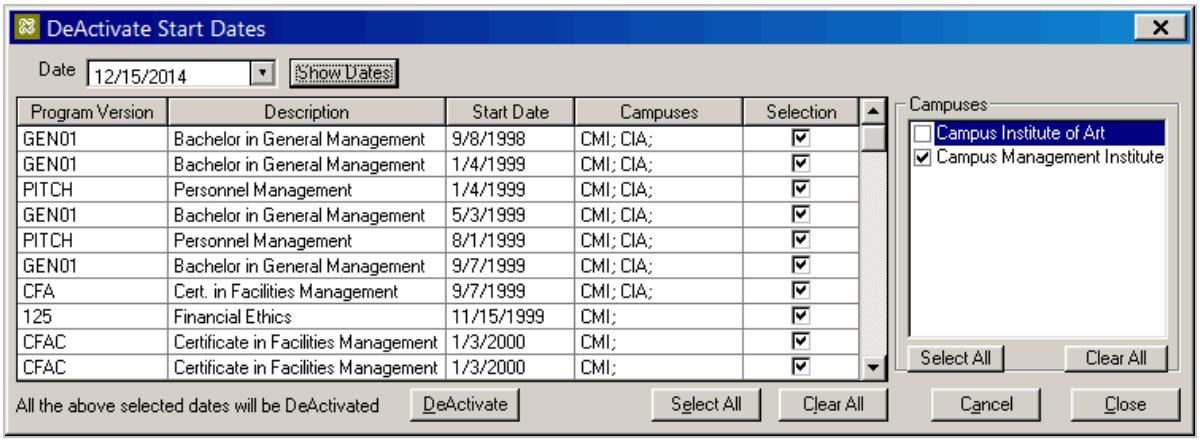
1. Navigate to **Tools > Academic Records > Deactivate Start Dates**. The DeActivate Start Dates form is displayed.



2. Select a **Date**.
3. Select one or more **Campuses**.
4. Click **Show Dates**.

   The form displays all programs that meet the filtering criteria of the start date and campuses. If a program version belongs to two campuses, and neither one of the campuses was selected, the program version is not displayed.

   - The Program Version column displays all programs that meet the filter criteria.
   - The Description column lists the description of all programs that meet the filter criteria.
   - The Start Date column lists the specific start date for the program listed on the same line.
   - The Campuses column displays all the selected campuses where the start date on that line applies.



5. In the **Selection** column, all dates that match the search criteria are selected. Remove the check marks for the dates you do not want to deactivate.
6. Click **DeActivate** to deactivate the selected dates (or click **Cancel** to reset the form). A confirmation message is displayed when the dates have been successfully deactivated.
7. Click **Close** to close the form.

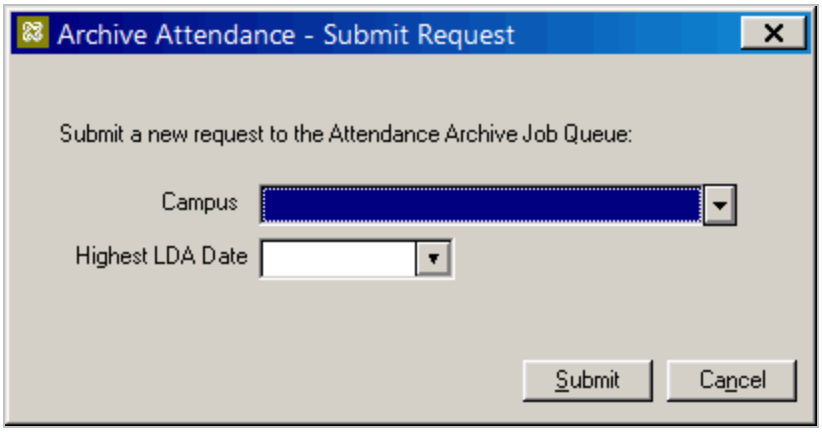
Archive Attendance

Use the Archive Attendance tool to archive attendance data. This tool improves the performance of CampusNexus Student with large student databases.

The Student Master form of any student whose records were archived displays a symbol indicating that attendance records were archived. You can recall the archived data from the Attendance form.

To archive attendance data:

1. Navigate to **Tools > Academic Records > Archive Attendance**. The Archive Attendance - Submit Request form is displayed.



2. Select the **Campus** for which attendance data is to be archived. Only one campus can be processed at a time.
3. In the **Highest LDA Date** field, select the last date of attendance (LDA) that should be archived. For instance, to archive attendance data prior to January 1, 2014, select 12/31/2013. Student attendance records with an LDA that occurs after 12/31/2013 will not be archived.
4. Click **Submit**. Click **OK** on the confirmation message.
5. The tool submits a request to archive the selected attendance records and displays a Tracking Number. Click **OK** to finish the archive task.

   The archive request is added to the CampusNexus Student system queue where it will be processed as scheduled by the database administrator (DBA). Typically, the DBA will schedule attendance archiving to run periodically, e.g., daily, weekly, monthly, and during non-peak hours.

To retrieve archived data for a student's enrollment:

1. Navigate to **View > Academic Records > Attendance**. With the Attendance form open and active for the student whose data you want to retrieve, select the student's enrollment for retrieval.
2. Click the **Recall Attendance** button.
3. When the confirmation message is displayed, check that the correct enrollment is selected, and click **Yes** to retrieve the archived data.

Modify Term Relationships

You can modify relationships between terms even when students have been registered into a term. This feature requires CampusNexus Student to update various parts of the student record. For example, if the term relationship is modified after students have been billed, the term associated with the transactions on the student's ledger card is updated to the new parent term. Once term relationships have been modified and saved, a report is displayed.

Note: You must have permissions to all campus locations associated with a child term. To configure the Term Relationships form, navigate to Setup > Security, select a Staff Group, and click View.

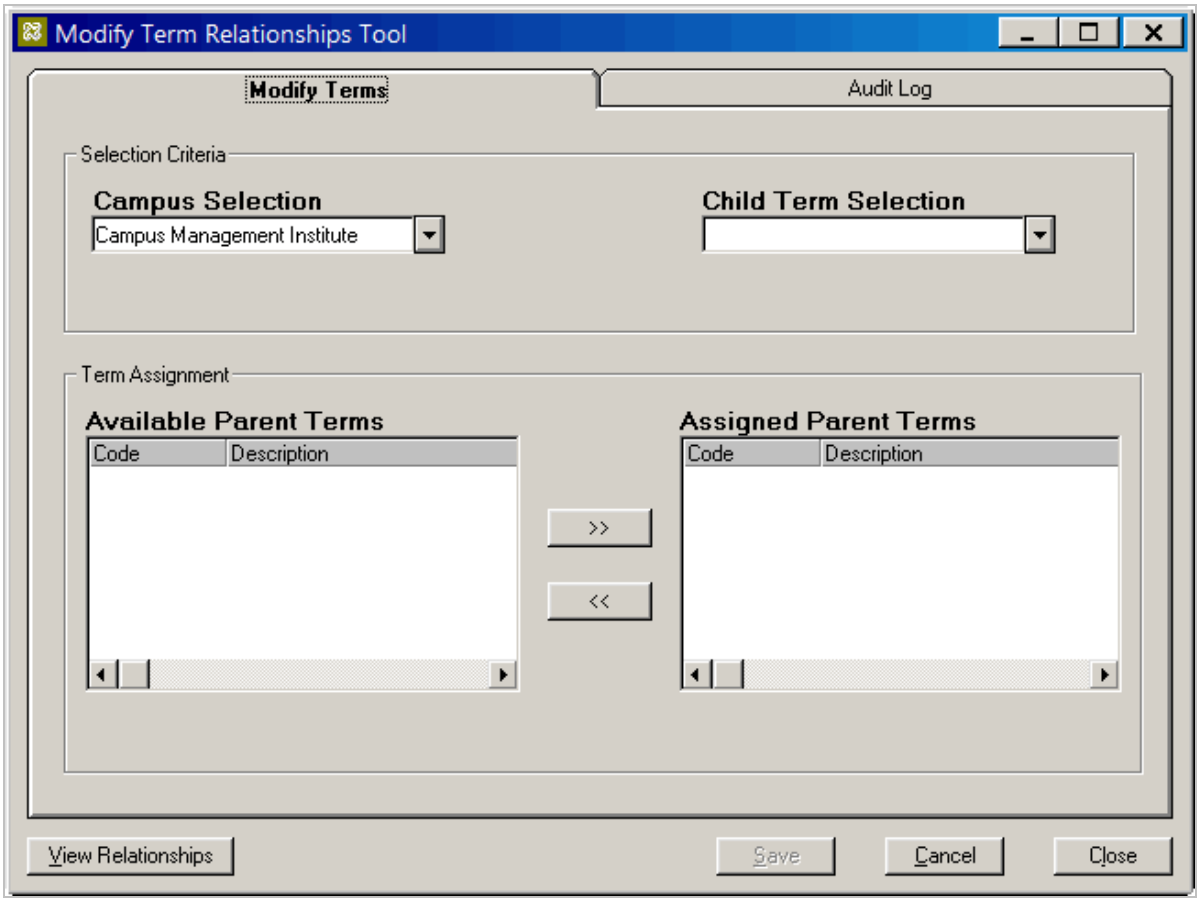
The following business rules must be met when modifying term relationships:

1. The term usage properties of Student Accounts, Financial Aid, and Registration/Attendance must be contained within the relationship, unless the parent term is a "Reporting Only" term.
2. The selection of a unique child term must meet the following criteria:
    - The term cannot be closed or inactive.
    - The term must have the term usage of Registration/Attendance.
    - The term must have at least one course that is scheduled or current.

When these rules are met and the term relationships have been modified and saved, CampusNexus Student updates all relevant areas of a student's record and logs any changes to the term relationships. Any affected enrollments are reported at the end of the process.

To modify term relationships:

1. Navigate to **Tools > Academic Records > Modify Term Relationships**. The Modify Term Relationships Tool is displayed.



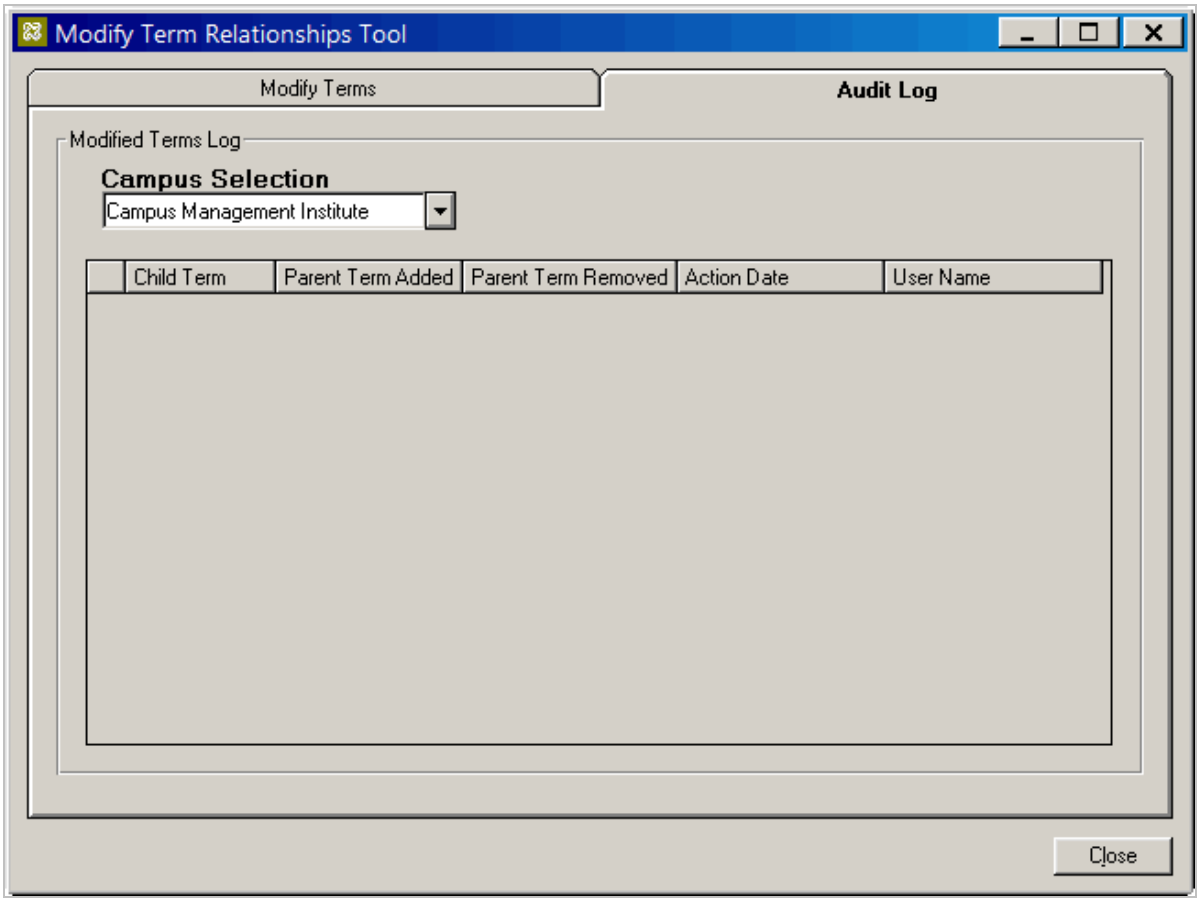
2. Click **View Relationships** to obtain a list of relationships.
3. Select a **Campus**.
4. Select a **Child Term**.
5. Modify the desired relationship and click **Save**.

   CampusNexus Student saves the modified term relationships and rebuilds the term summary for every student that was registered in the selected child term.

   - The terms are displayed using the business logic that is in place to define relationships (Lists > Academic Records > Terms > Length Relationships > Define Relationships) which identifies the parent terms that are *currently* and *potentially* assigned to the selected child term.
   - The term summary is recalculated using the business logic that is in place to rebuild relationships (View > Academic Records > Enrollment > Term Summary > Rebuild Relationships).

   At the end of the Save process a report displays the results of rebuilding term relationships on enrollments for the child term .

   Note: This report is not available from the Reports menu.
6. Any changes to the term relationships are posted to the audit log. Click the **Audit Log** tab and select the **Campus** to view the term relationship changes for the campus.


Modify Term Relationships Tool
Modify Terms
Audit Log
Modified Terms Log
Campus Selection
Campus Management Institute
Child Term
Parent Term Added
Parent Term Removed
Action Date
User Name
Close

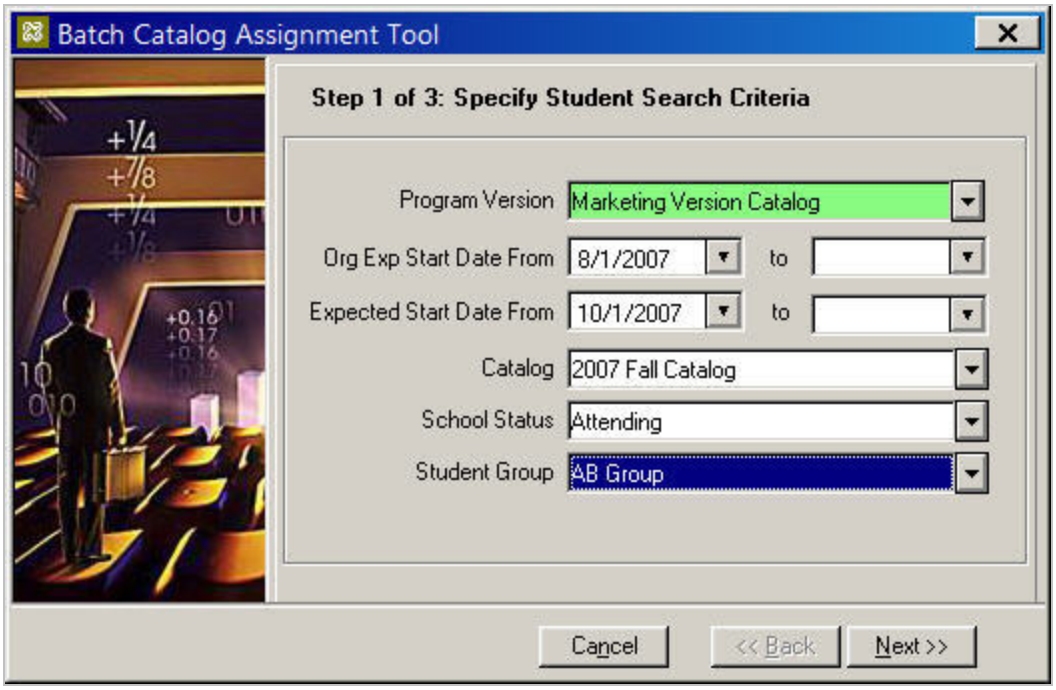
Batch Catalog Assignment Tool

This tool is used by the Registrar when assigning a group of students to a new catalog. This may be required if a number of students enrolled before a catalog was finalized. Rather than changing the catalog one student at a time, the Batch Catalog Assignment Tool allows a specified group of students to be migrated to a new catalog. One or more students must have been enrolled in a catalog that now needs to be changed. These students can be identified by a unique characteristic such as a combination of Expected Start Date, Catalog, Program Version, School Status, and Student Group. See also Student Degree Evaluation Report.

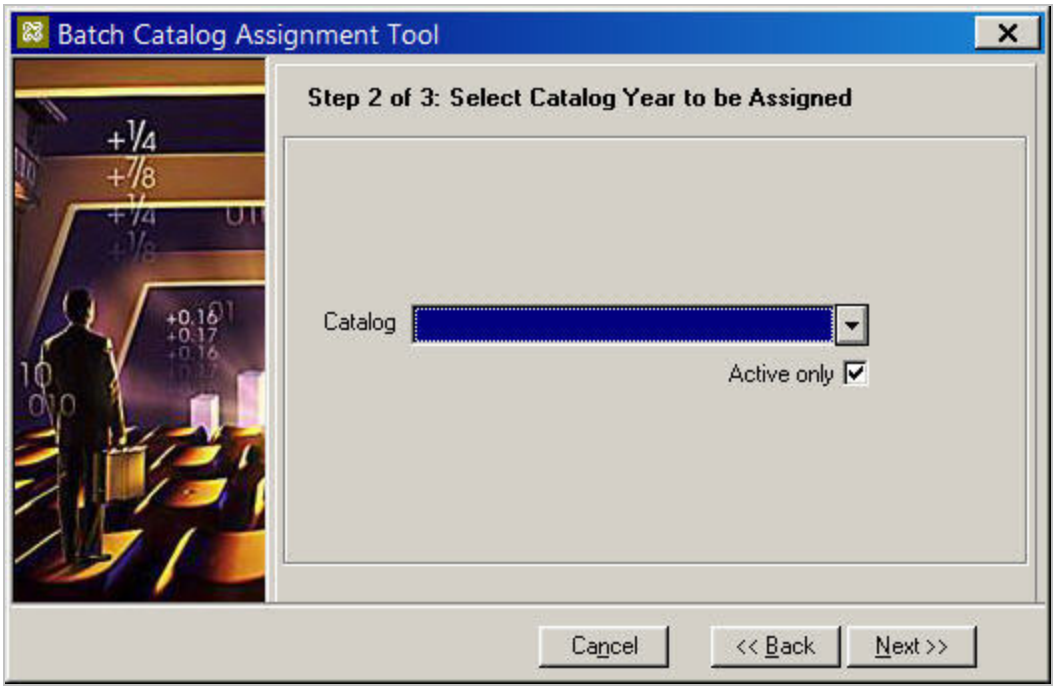
Note: For students who are transferred, CampusNexus Student assigns a new course schedule based upon the new catalog. This does not affect courses in the student's schedule that have a status of current, completed, or scheduled.

To assign a group of students to a new catalog:

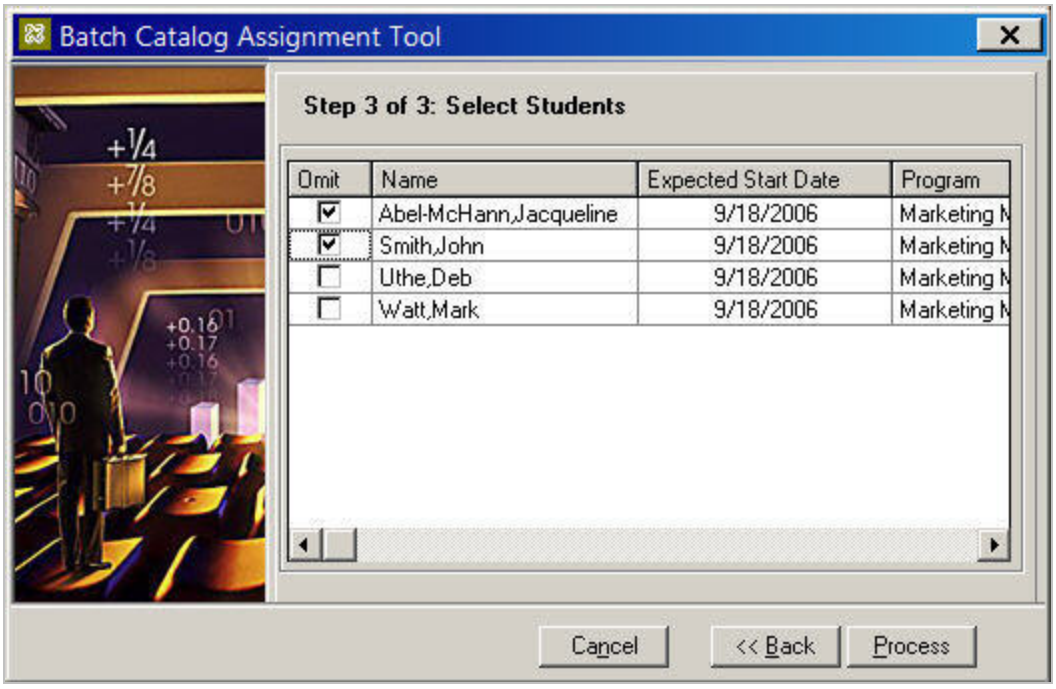
1. Navigate to **Tools > Academic Records > Batch Catalog Assignment**. The Batch Catalog Assignment Tool is displayed.



2. Select appropriate options for **Program Version**, **Original Expected Start dates**, **Expected Start dates**, **Catalog**, **School Status**, and **Student Group**. Make sure you select a Program Version that has one or more associated catalogs.
3. Click **Next**. Step 2 of 3: Select Catalog Year to be Assigned is displayed.



4. Select the **Catalog** to be assigned to the students.
5. Click the **Next**. Step 3 of 3: Select Students is displayed.



6. Select the students that will not be assigned to the selected catalog by selecting the **Omit** check box beside the student's name.
7. Click **Process**. A confirmation message states "All Students Processed Successfully!"

For courses that have a status of 'Future', the wizard transfers the students (except for those that were omitted) to the new catalog provided that the existing Program Version and Area of Study (if applicable) are associated with the new catalog. A report is produced listing students who were unable to be transferred into the new catalog along with the reason.

8. Click **Close** to close the form.

Update Version Start Date

Use this tool to correct enrollment version start dates. This tool gathers records for one student and enrollment at a time. An audit feature tracks all version start date changes and comments and posts them in the Admissions Audit folder.

The version start date can be updated to a blank value *only* when a student has a school status that is associated with a system status category of:

- C (Applicant)
- N (Never Attended)
- W (NDS-Never Attended)

OR is associated with a system status code of

- FUT
- BP
- NDS-FUT
- NDS-BP

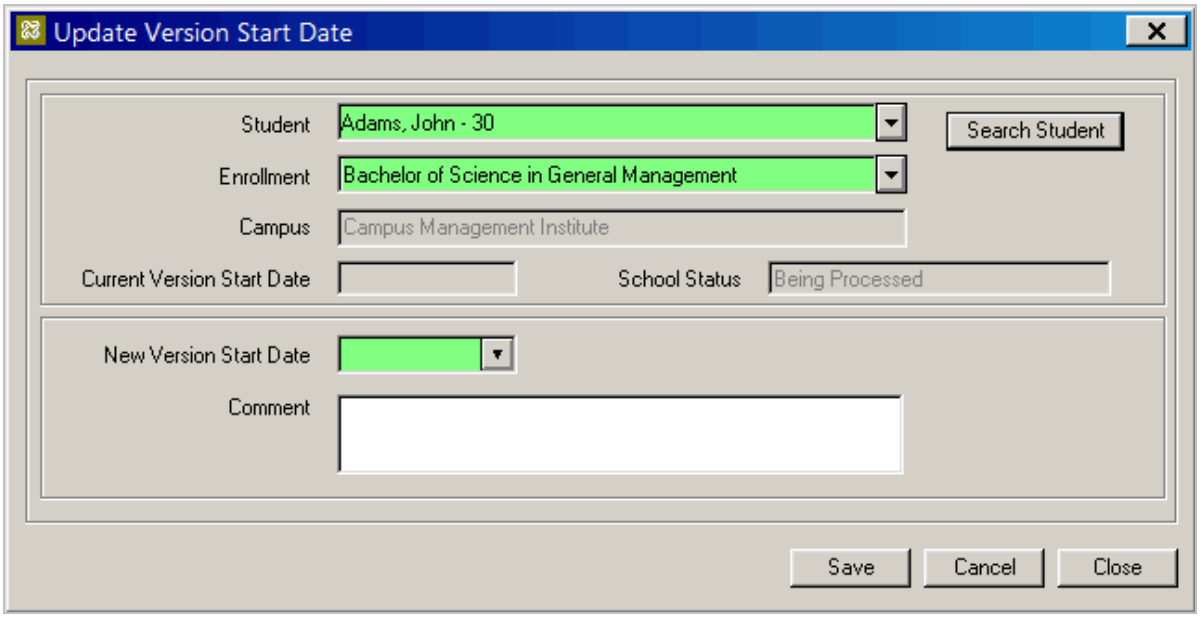
CampusNexus Student does not accept a blank value for the student's version start date for any other school status that is not associated with one of the system status categories, or system status codes listed above.

The current date validation rules that apply to the Version Start Date value itself are enforced in the tool, such as the date entered must be an earlier date than the Expected Grad Date. Any changes made to the Version Start Date are updated on the student's Enrollment folder.

Institutions with program versions using Academic Calendars 5 or 6 and using the Student Pace Evaluator (SPE) also execute the auto-adjust AY/LP evaluation logic and place the enrollment in the SPE queue. This allows CampusNexus Student to account for any needed changes in AY/LP sequences based on the change to the version start date, and re-measure the students progression through their academic years.

To update the version start date:

1. Navigate to **Tools > Academic Records > Update Version Start Date**. The Update Version Start Date form is displayed. By default the current student and enrollment are displayed.



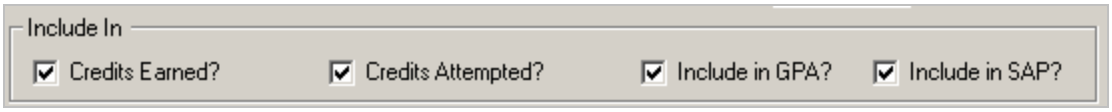
2. Click **Search Student** to search for a specific student and enrollment.

3. If a Current Version Start Date exists, it is displayed. The School Status field displays the student's school status.
4. Select the **New Version Start Date**.
5. Enter any comments in the **Comment** field.
6. Click **Save**.
7. A confirmation message is displayed. Click **OK**.

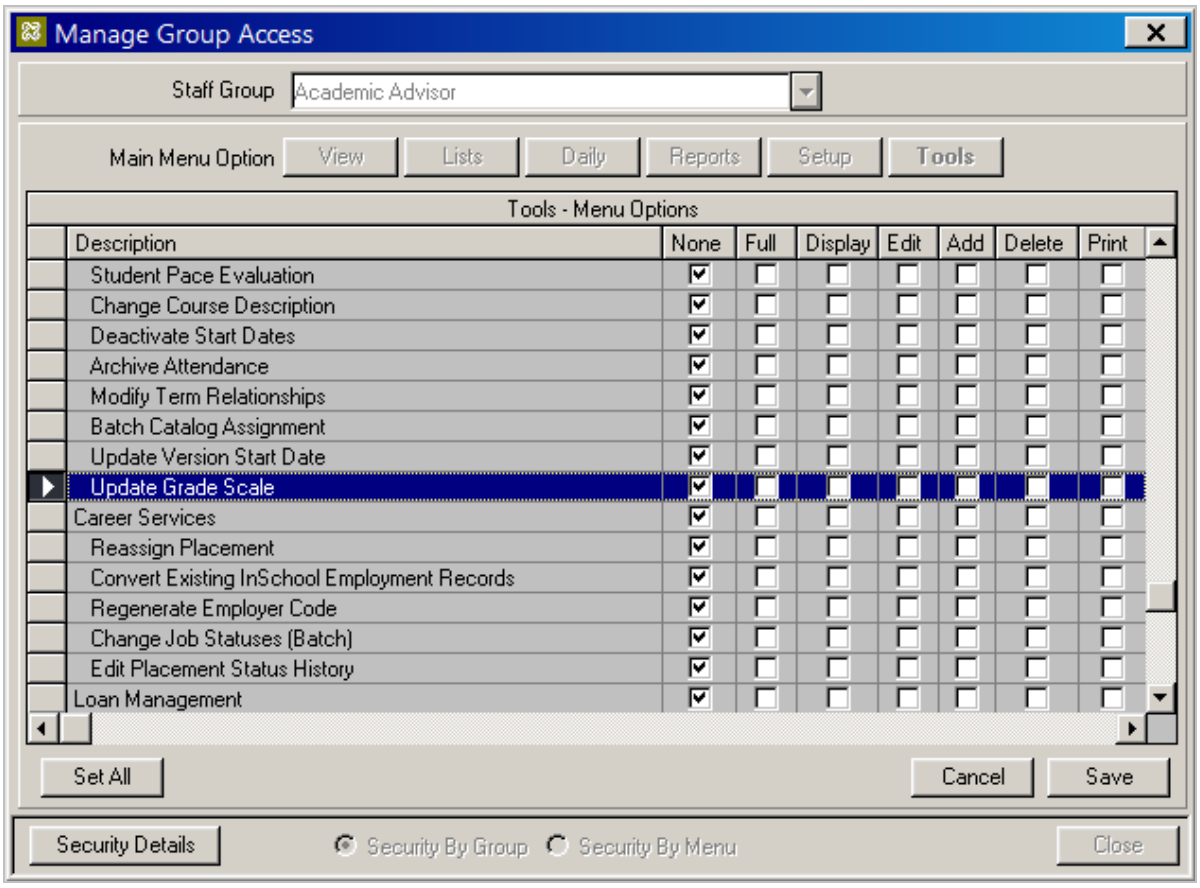
Update Grade Scale

The Update Grade Scale tool is used by academic advisors to update grades for a batch of students. When an advisor changes a grade in a grade scale, this tool is run to update the changes for students.

Note: The only criteria that apply to this tool are updates in the following fields on the Grade Letter Setup form:

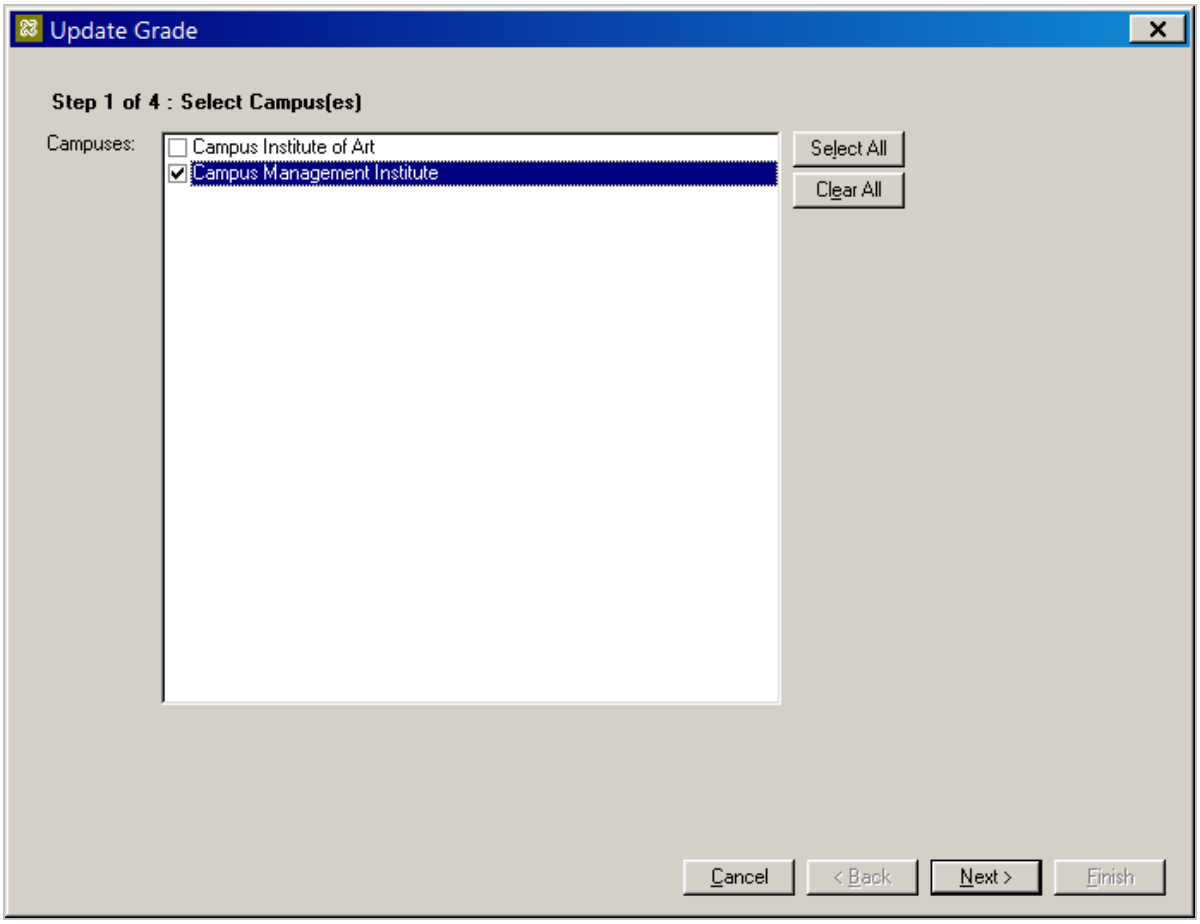


To use the tool, appropriate permissions must first be set up in Setup > Security > Tools. On the Manage Group Access form under Academic Records, select the **Update Grade Scale** check boxes accordingly.

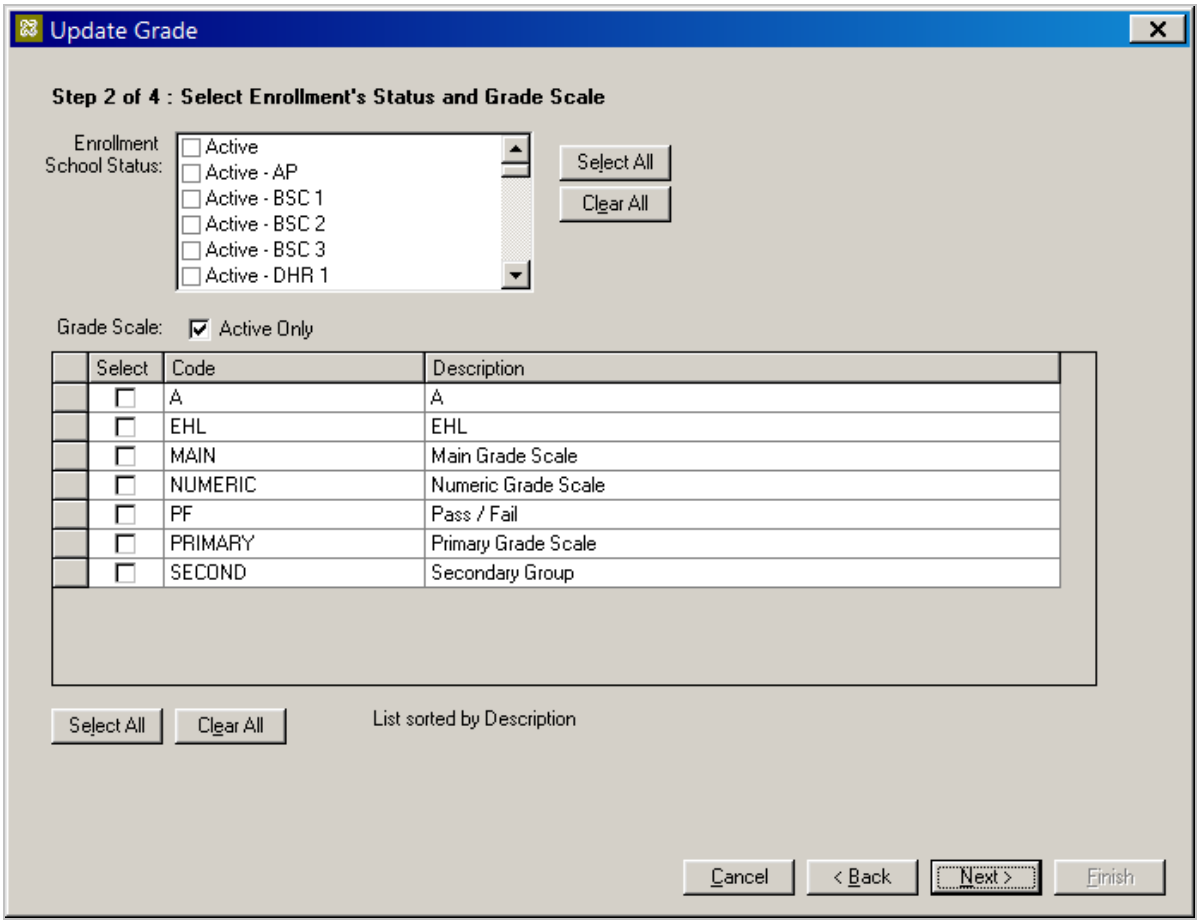


To update grade scales:

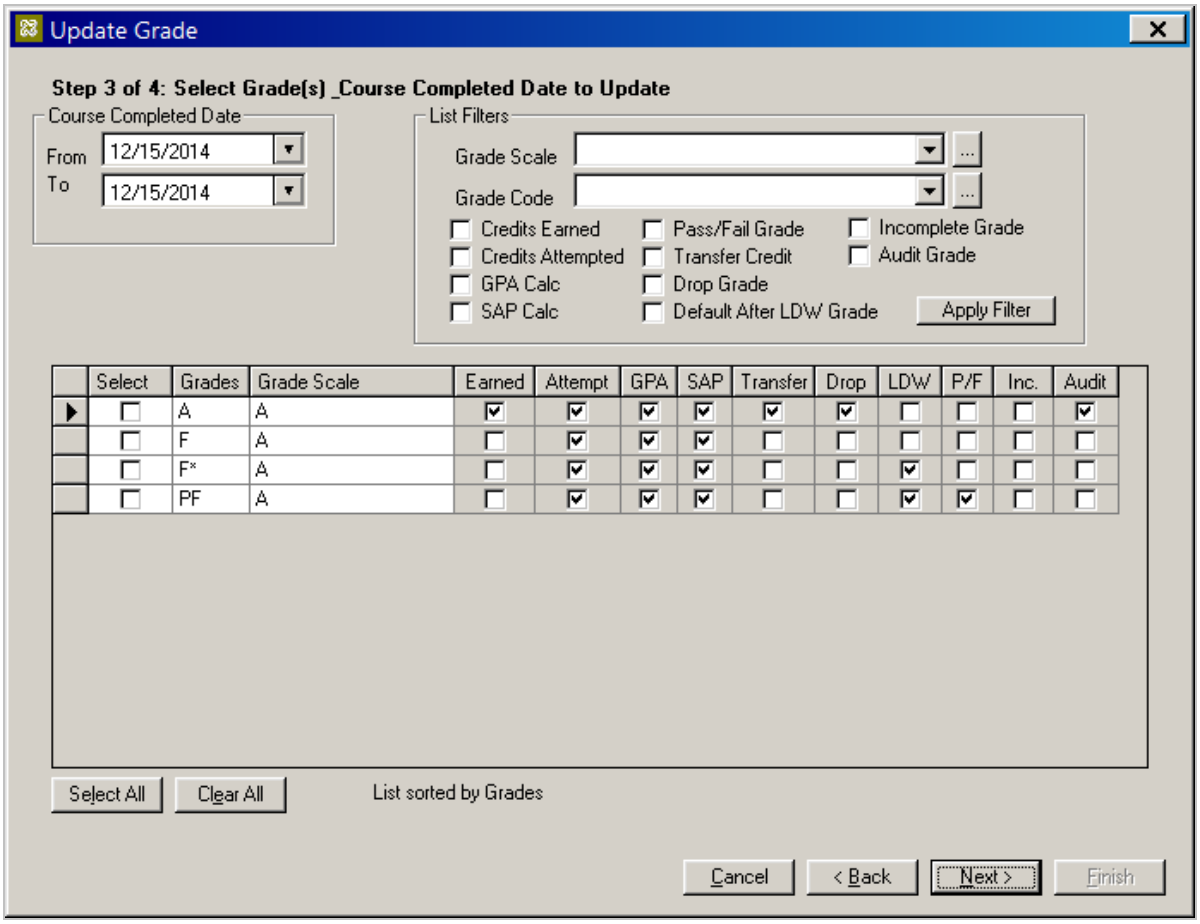
1. Navigate to **Tools > Academic Records > Update Grade Scale**. Step 1 of the Update Grade tool is displayed.



2. Select one or more **Campuses**.
3. Click **Next** to proceed to Step 2.



4. Select **Enrollment School Status** and **Grade Scale** values .
5. Click **Next** to proceed to Step 3.



6. Select appropriate options in Step 3:

    a. Select the **Grades** to be updated from the list displayed for the selected Grade Scales.

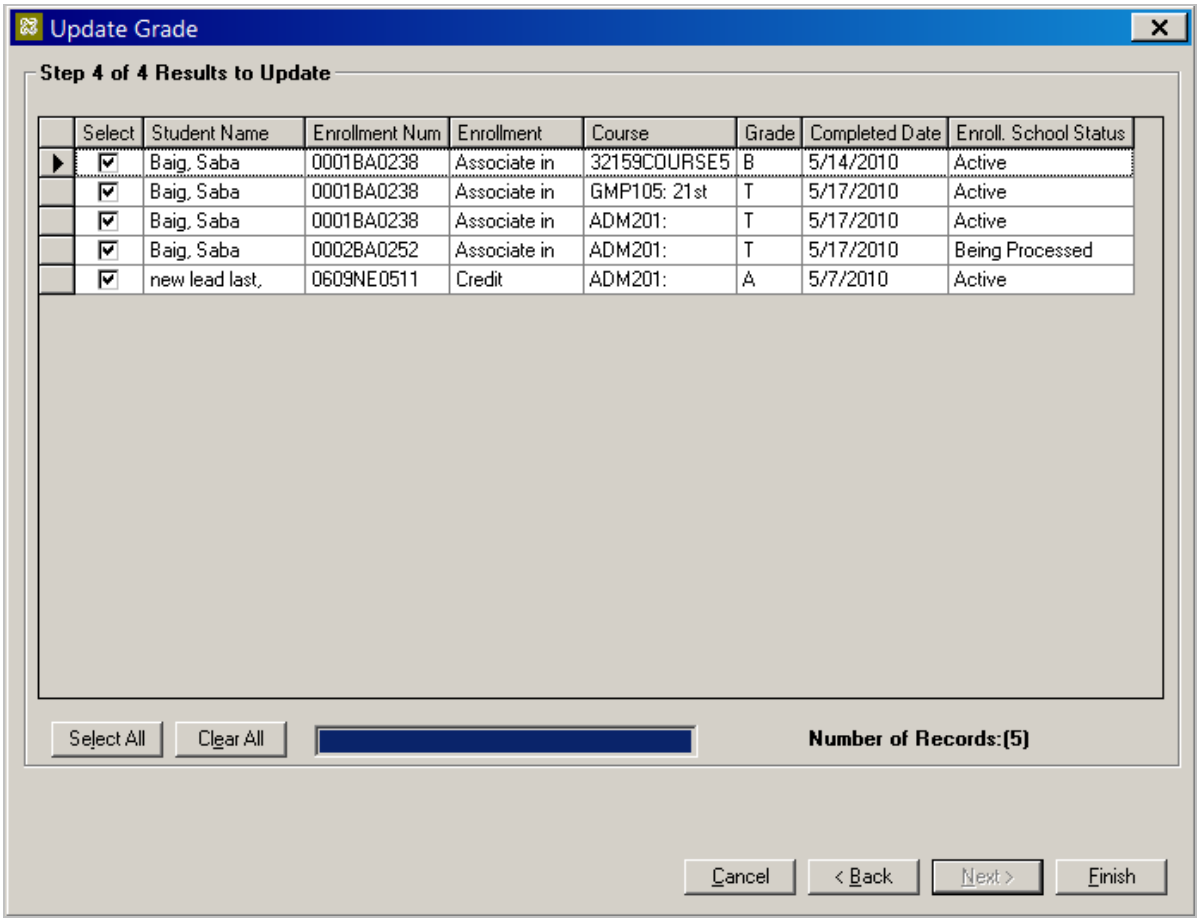
    b. Select the **Course Completed Date** range using the **From** and **To** fields.

    c. Use the options in the **List Filters** group box to modify your selections as needed.

    Change the **Grade Scale** and/or **Grade Code** and select or clear the check boxes corresponding to the following filter options (click **Apply Filter** to apply the changes in each case):

    - Credits Earned
    - Credits Attempted
    - GPA Calc
    - SAP Calc
    - Pass/Fail Grade
    - Transfer Credit
    - Drop Grade
    - Default After LDW Grade
    - Incomplete Grade
    - Audit Grade

7. Click **Next** to proceed to Step 4.



8. Step 4 displays the records resulting from your selections in Steps 1, 2, and 3. Select or clear the check boxes for the students whose grades are to be included or excluded in the update. After completing your selections, click **Finish**.
9. To confirm your selections and proceed with the update, click **Yes**.
10. A confirmation message is displayed. Click **OK**.

Tools > Career Services

The Tools > Career Services submenu options are as follows:

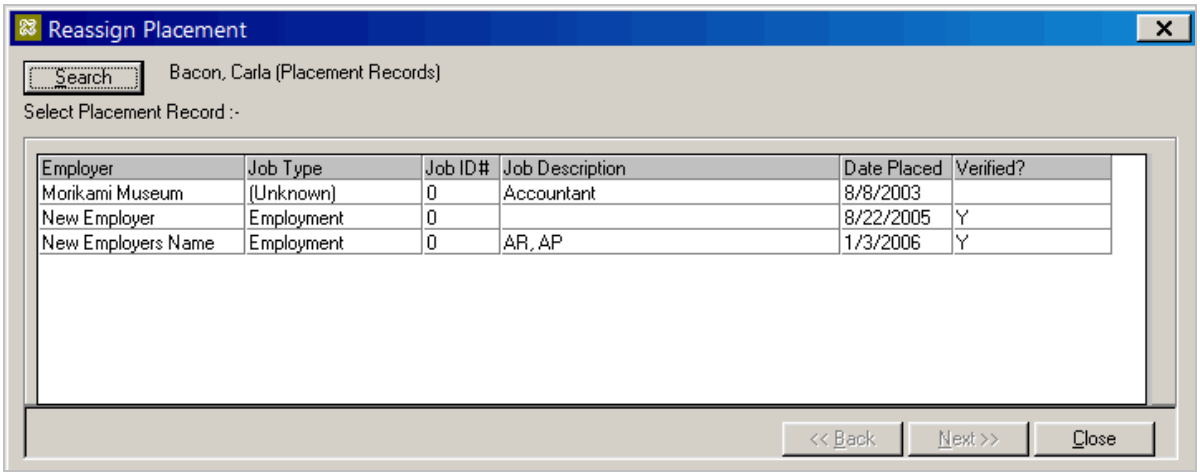
- Reassign Placement
- Convert Existing InSchool Employment Records
- Regenerate Employer Code
- Change Job Statuses (Batch)
- Edit Placement Status History

Reassign Placement

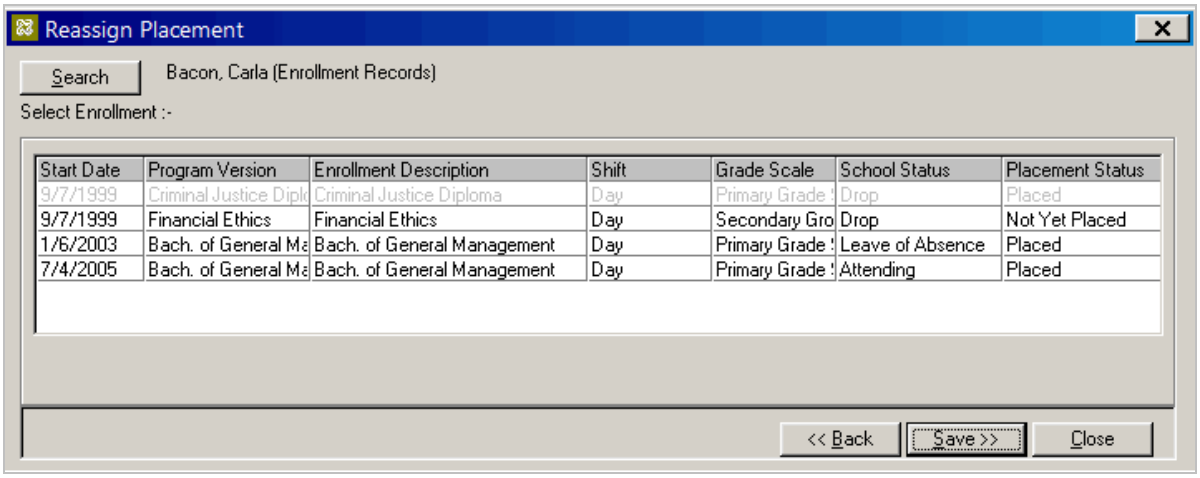
Use the Reassign Placement tool to reassign a placement record to a different enrollment if the original assignment was in error. The action of reassigning placement records to new enrollments is included in the student Placement Audit. Access to this feature is restricted based on the user's access to the Tools menu.

To reassign a placement:

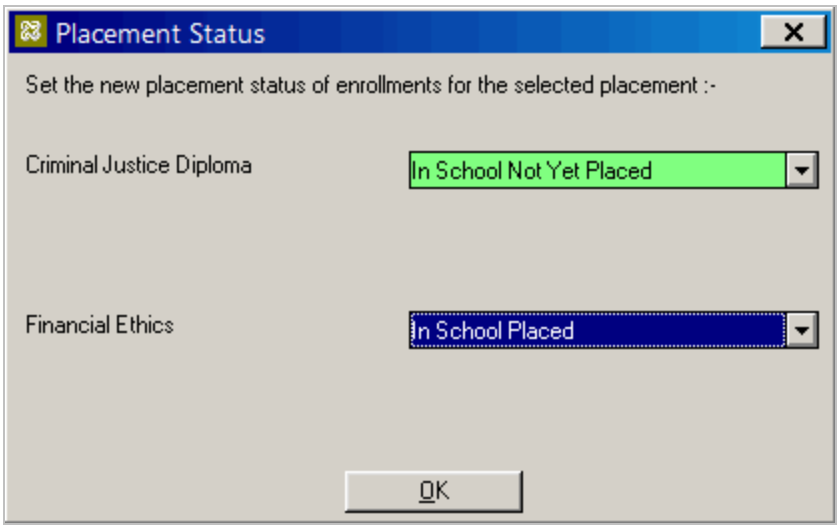
1. Navigate to **Tools > Career Services > Reassign Placement**. The Reassign Placement form is displayed.
2. Click **Search** and enter the search criteria to find the student record to be changed. Double-click the row that corresponds to the student record to be changed. If the selected student record does not meet the selection criteria for the reassignment, a message is displayed.
3. If the selected student record meets the reassignment criteria, the placement records are displayed on the Reassign Placement form. Select a **Placement Record** and click **Next**.



4. If the selected student record meets the reassignment criteria, the enrollment records are displayed on the Reassign Placement form. Select an **Enrollment Record** and click **Next**.



5. Click **Save**. The Placement Status form is displayed.



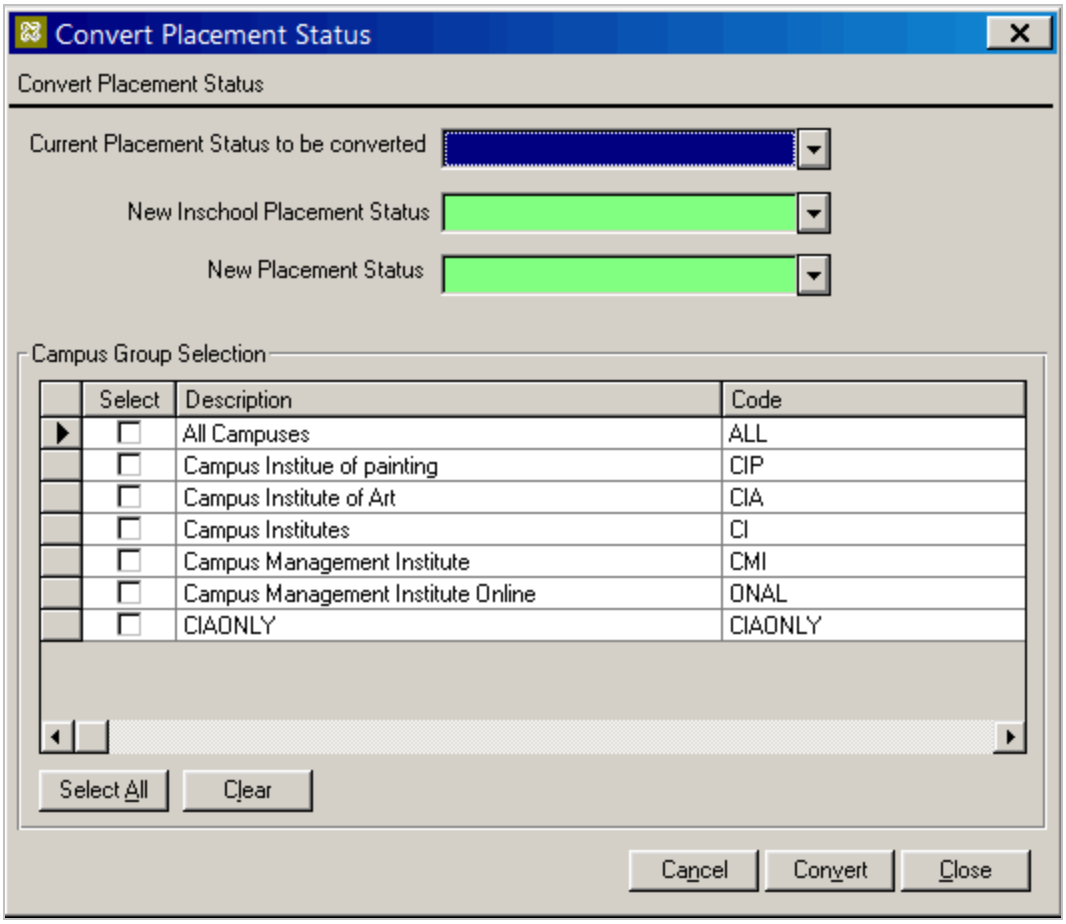
6. In the Placement Status form, select the new **placement status** for each enrollment, and click **OK**.
7. A confirmation message is displayed. Click **OK**. The selected placement status is changed. The placement status history is updated for each enrollment record that had its placement status modified.

Convert Existing InSchool Employment Records

System administrators use this tool to convert a batch of placement status records to a new InSchool placement status.

To convert placement statuses:

1. Navigate to **Tools > Career Services > Convert Existing InSchool Employment Records**. The Convert Placement Status form is displayed.



2. Select the placement status to be converted from the **Current Placement Status to be converted** list.
3. Select the InSchool status to be applied to each placement record from the **New In-school Placement Status** list.
4. Select the new placement status to be applied from the **New Placement Status** list.
5. Select one or more **Campuses**.
6. Click **Convert** to change the statuses for all selected records. All placement records for students in the selected campuses who have the selected status are converted to the new status.
7. Click **Close** to close the form.

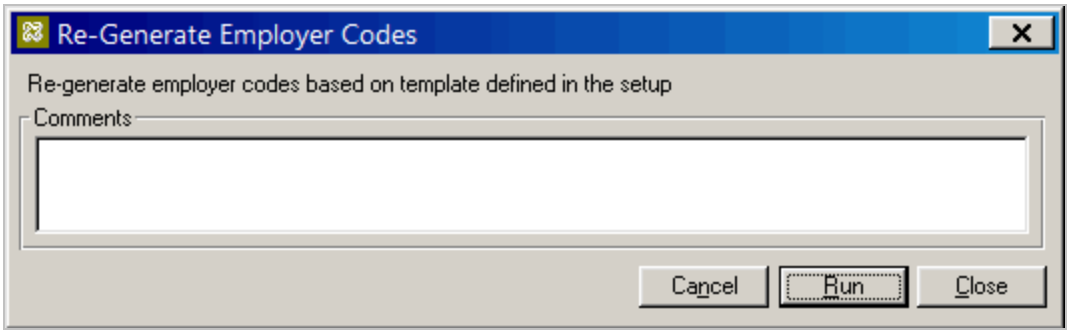
Regenerate Employer Codes

Use this tool to regenerate employer codes based on the Employer Code Format template for any employers currently in the database. If the Employer Code Format contains a date parameter, the Date Added stored on the employer record is used, otherwise the system date is used.

IMPORTANT! When you upgrade CampusNexus Student for a campus that has implemented Portal, the Employer Code option (Setup > Career Services > Settings tab) must be set to Use Employer Code Format, and you must run the Regenerate Employer Code tool before using Portal. The regeneration of employer codes requires that employers use the newly created employer code as the user name for Portal Login.

To regenerate employer codes:

1. Navigate to **Tools > Career Services > Regenerate Employer Code**. The following form is displayed.



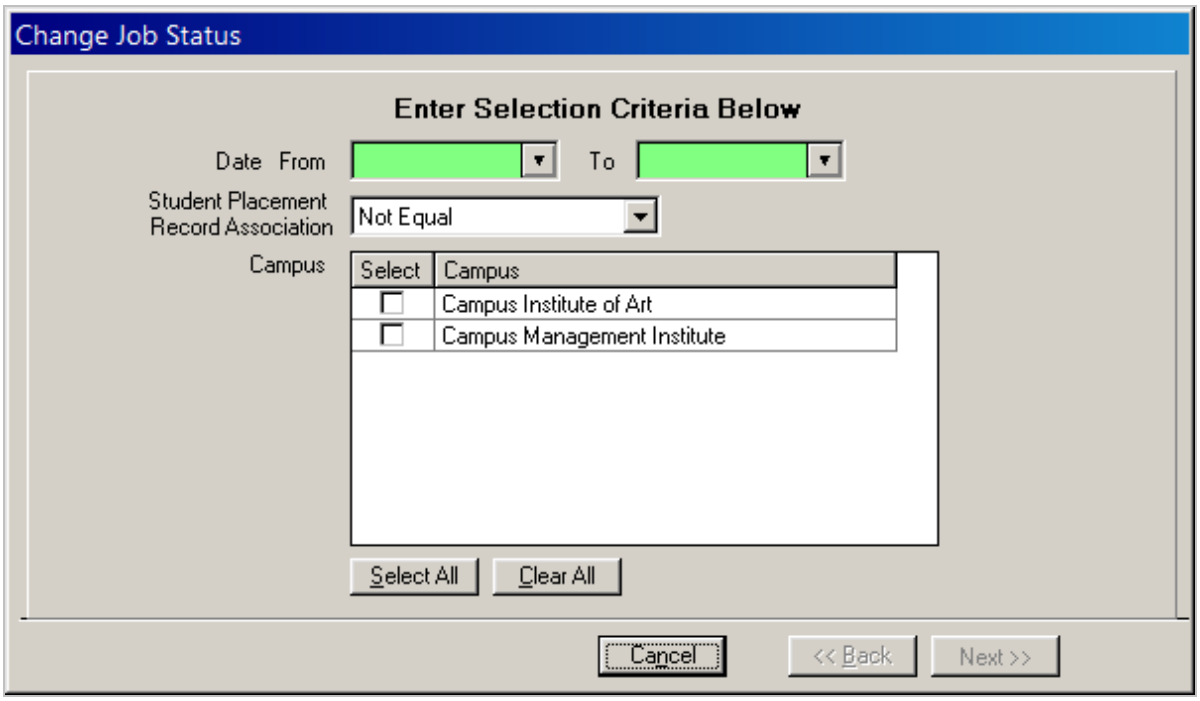
2. Enter any comments in the **Comment** field. The text entered into the Comments field appears in the Employer Audit table.
3. Click **Run** to modify the employer codes to the current format.
4. Click **Close** to close the form.

Change Job Statuses (Batch)

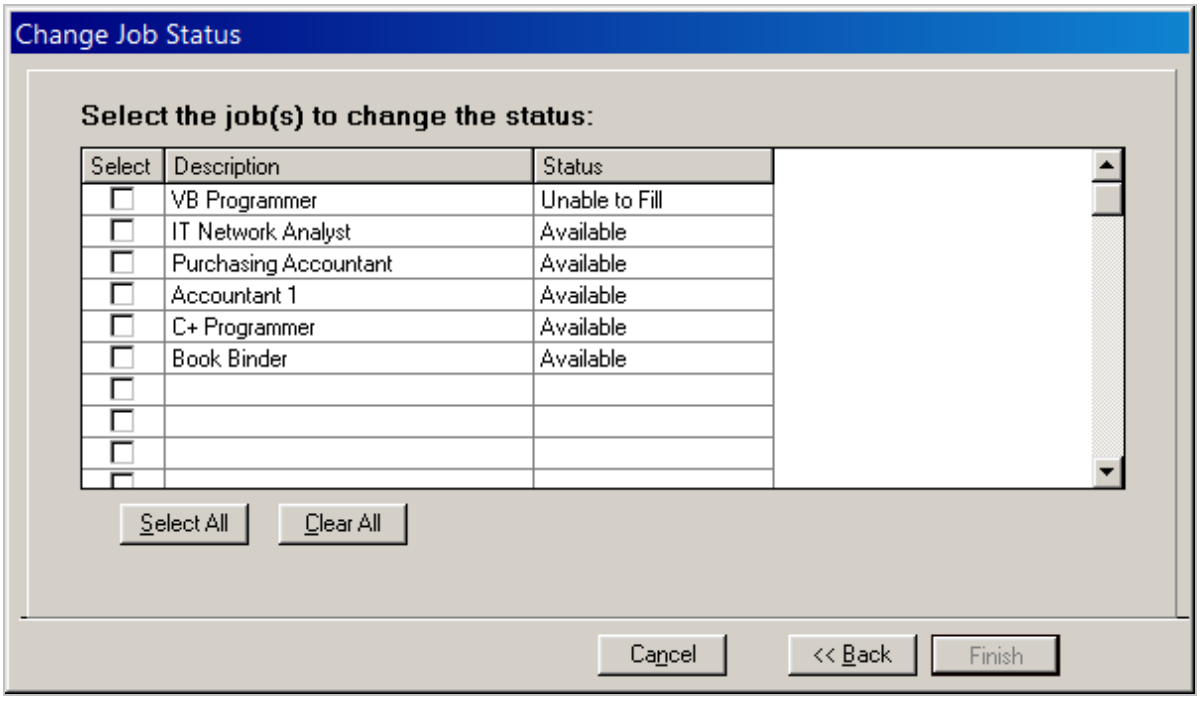
System administrator use this tool to convert a batch of job statuses within a specific date range. The statuses of the selected jobs are changed to the value specified and saved in CampusNexus Student. Employer Audit records are updated to reflect any changes made to the employer available jobs values.

To change job statuses:

1. Navigate to **Tools > Career Services > Change Job Statuses (Batch)**. The Change Job Status form is displayed.



2. In the **Date From**and **To** fields specify the date range that includes all the statuses which are to be changed.
3. Select an option from the **Student Placement Record Association** list.
    - **None** - No student placement record is associated with the filled job. If this option is selected, the next form displays the following fields:
        - **Description** that displays the name or code of the filled job
        - **Status** of the job
    - **Not Equal** - The number of student placement records does not equal to the number of filled jobs. If this option is selected, the next form displays the following fields:
        - **Description**
        - **Status** of the job
        - **Number Filled**
        - **Placement Record(s)**
4. Select one or more **Campuses**.
5. Click **Next**.



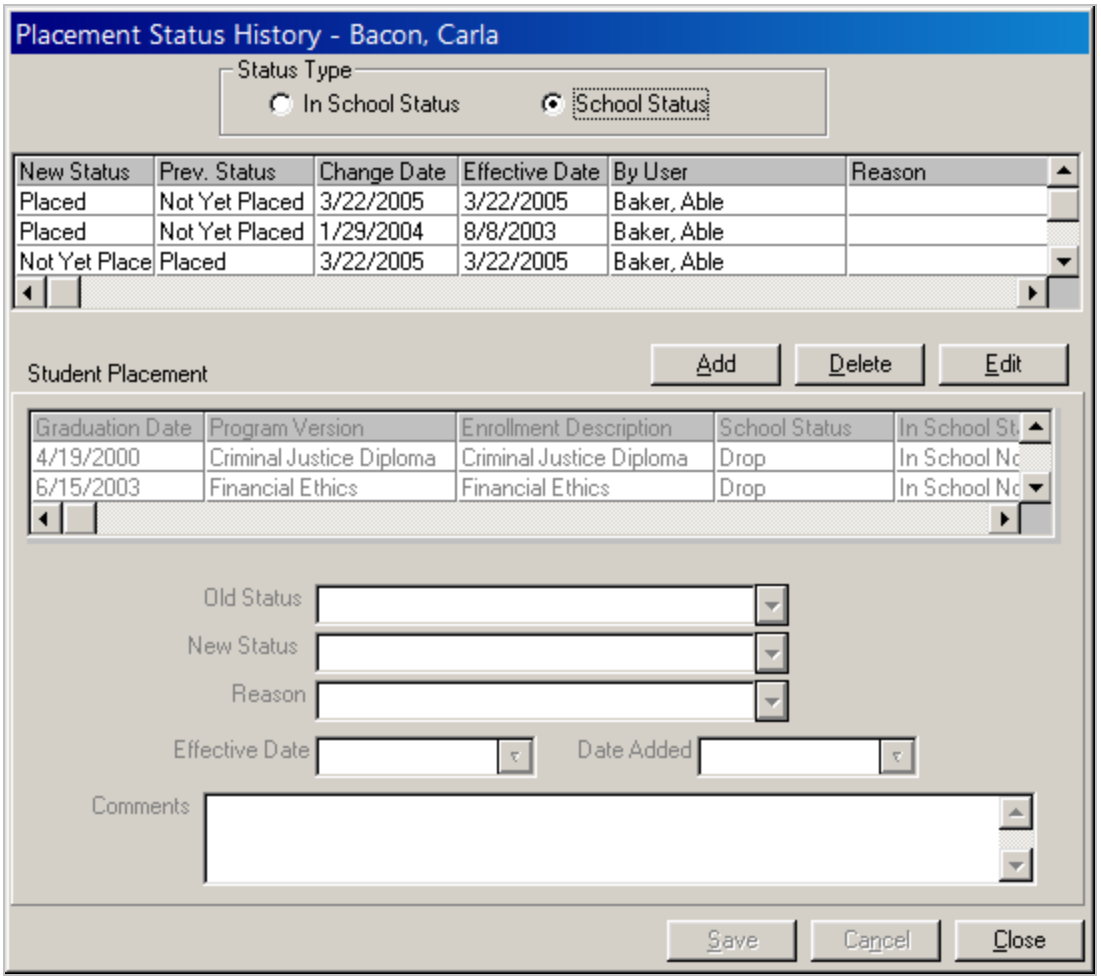
6. Select the **jobs** whose status you want changed.
7. Click **Finish**.

Edit Placement Status History

Use this tool to view, edit, add, or delete the placement status types for a student.

To view or modify placement status types:

1. Select the student whose record you want to view or change.
2. Navigate to **Tools > Career Services > Edit Placement Status History**. The Placement Status History form is displayed.



3. Select the **Status Type**, In School Status or School Status.
4. Select the record you want to view or modify.
5. Click **Edit** to change the placement status history. Click **Add** to add a new entry.
6. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Tools > Loan Management

Currently, no tools are available for this menu option.

Tools > System

The Tools > System submenu options are as follows:

- Merge Student Master Records (This option is not available when CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll.)
- Purge Leads
- Edit Student Status History
- Delete Credit Card Verification Code
- Export Student Data for Talisma Fundraising (This option is available only if CampusNexus Student is integrated with Talisma Fundraising.)

Merge Student Master Records

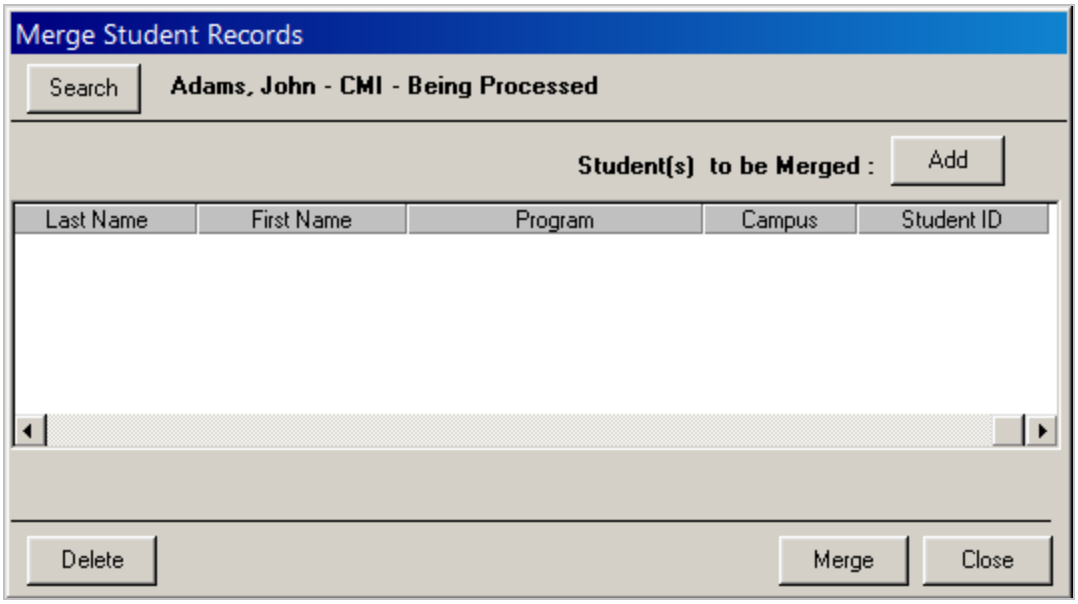
Duplicate student masters records are usually a result of clerical error or name changes that have not been updated in the institution's records. In such cases, multiple student master records must be merged.

WARNING: The student master records that you merge into your current student are deleted. This process is **not reversible** and should be used with extreme caution!

Note: The Merge Student Master Records option is not available when CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll.

To merge student master records:

1. Select the student for whom you want to merge records
2. Navigate to **Tools > System > Merge Student Records**. The Merge Student Records form is displayed.



3. Click **Search** to find any duplicate records for this student or records that share values that should be unique to an individual student, for example, two student records that share one Social Security Number (SSN). SSNs must then be assigned to the correct students. If there are duplicates, CampusNexus Student displays the Search form.
4. Click **Add** to search for and select student records to be merged with your current student.
5. Select a student from the grid and click **Delete** to remove that record.
6. Click **Merge** to complete the process. The resultant record shows the student master information from your current student along with a separate enrollment record for each student that you merged. The status shown on the student master reflects the status of the most current enrollment as determined by the status hierarchy.
7. When merging students, CampusNexus Student checks for duplicate Pell records. If a duplicate Pell record is found, CampusNexus Student prompts you to use the Fix Duplicate Pell Records tool to resolve the conflict. CampusNexus Student merges the two (or more) Pell records, but you still need to return to the Merge Student Records form to finalize the merge.

Purge Leads

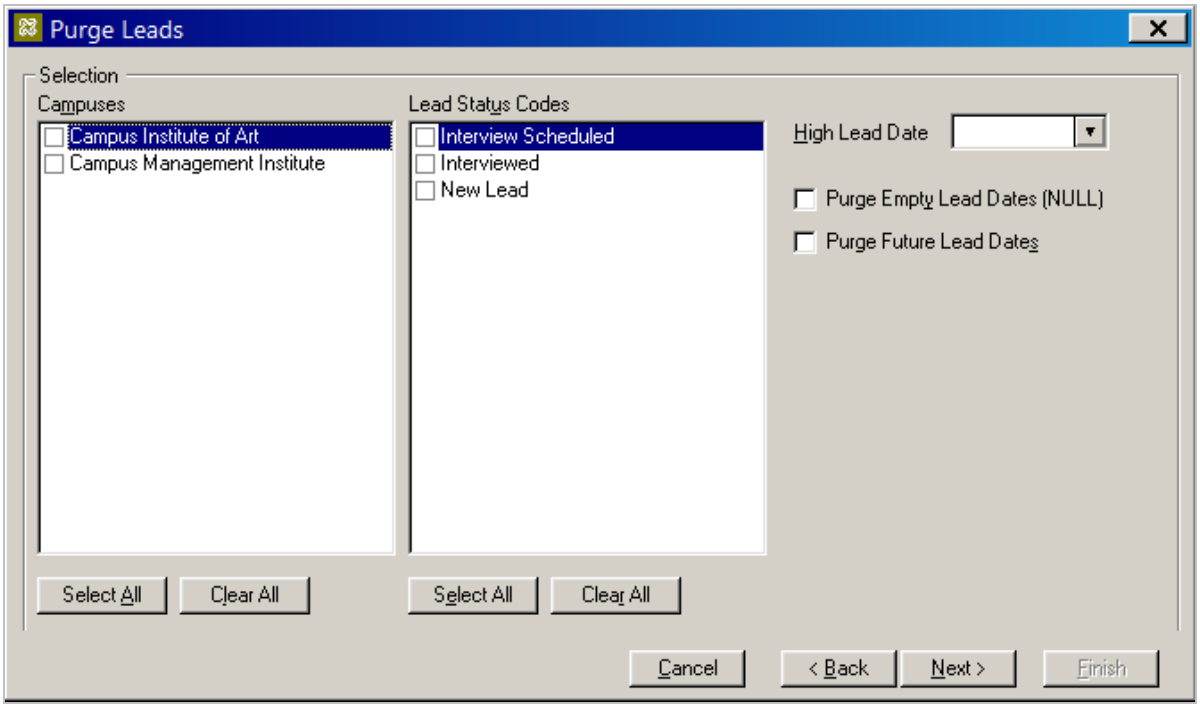
The Purge Leads tool provides a means for the mass deletion of student records. Be careful when using this tool:

- Purging large numbers of leads can cause performance problems on the server depending on server resources available and the relative size of the database. Purge large numbers of leads incrementally. Perform purges when significant server resources are not in use.
- CampusNexus Student provides a warning if more than 25000 leads are selected for purging. Lead purging times out after one hour. Large purges that cannot be handled by available resources will time out.

WARNING: The purge process is **not reversible**! The purged student records cannot be restored in your database.

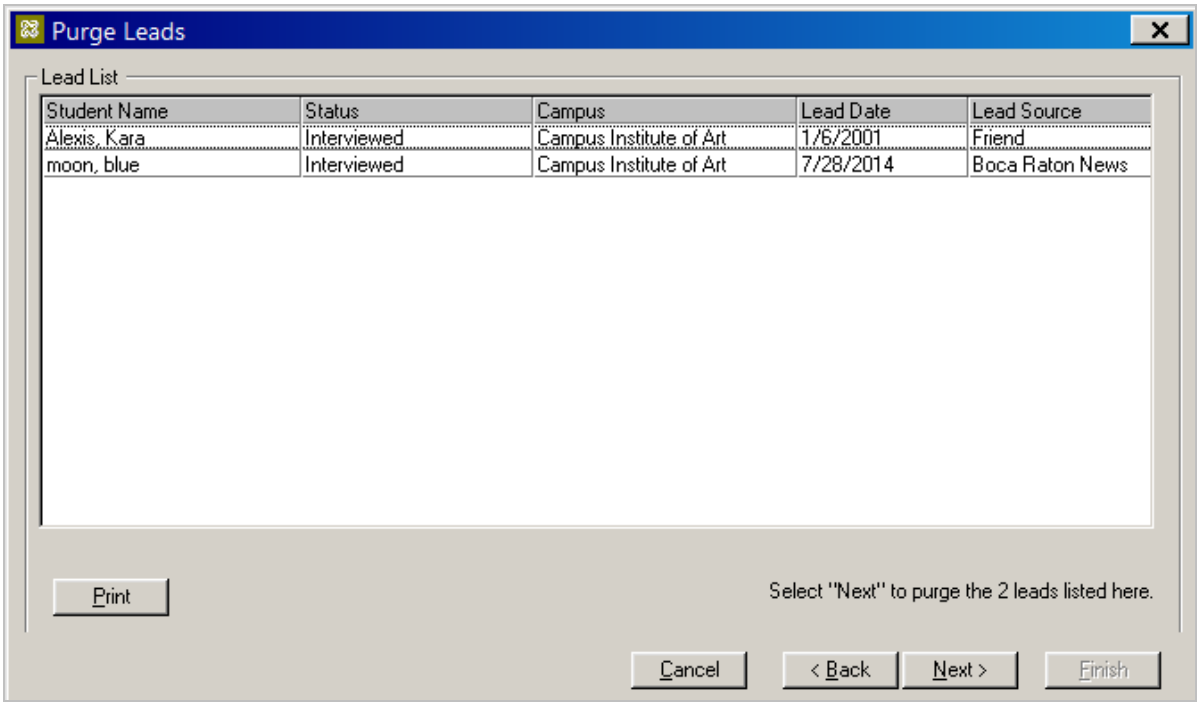
To purge leads:

1. Navigate to **Tools > System > Purge Leads**. The Purge Leads form is displayed.



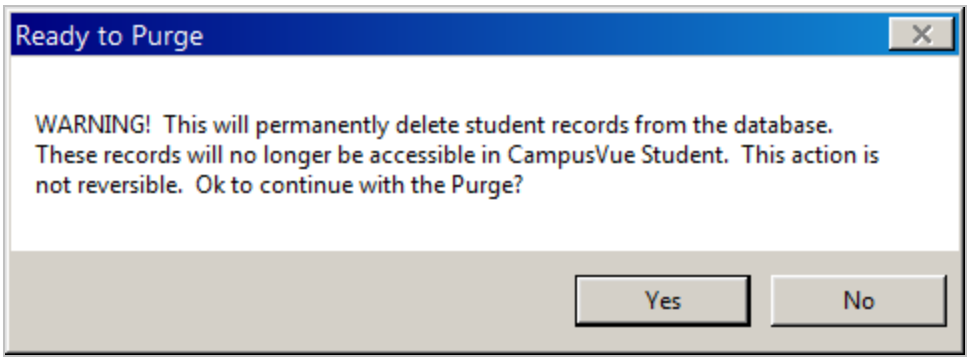
2. Select one or more **Campuses**.
3. Select one or more **Lead Status Codes**. The list of available statuses contains only those statuses that belong to the "Lead" system status category.
4. In the **High Lead Date** field, select the maximum lead date. Select from the options to purge only blank lead dates, and/or lead dates that are in the future.

   Rows that match the selection criteria are added to a new table "SyPurge_SyStudent" and removed from the SyStudent table. SyStudent rows that have any associated SaTrans rows are not purged.
5. Click **Next**.
6. Review the list of records to be purged. Click **Next**.



If necessary, click **Back** to change your selection criteria, **Print** the lead list, or **Cancel** the process.

7. If you clicked Next, the following warning is displayed. Click **Yes** to continue.



8. The purge process reports the number of records purged. Click **OK**.
9. Click **Finish** to close the Purge Leads form.

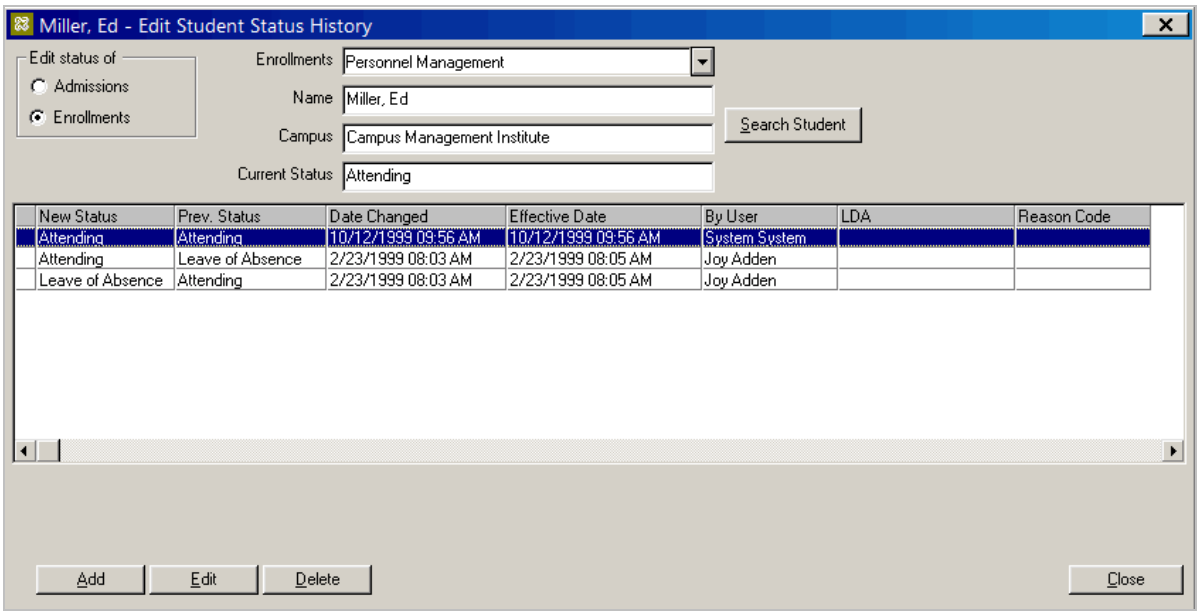
Edit Student Status History

Use the Edit Student Status History tool to modify a student's status history. The student master record, student admissions master record, and student enrollment master record are updated with the changes to the status history.

WARNING: This process does not validate status changes and should be used with caution. Using this tool improperly can have adverse effects on Admissions performance reports, the Population Analysis cube report, the SSCR process, the Clearinghouse process, or any other CampusNexus Student report or process that uses information about a student's status history.

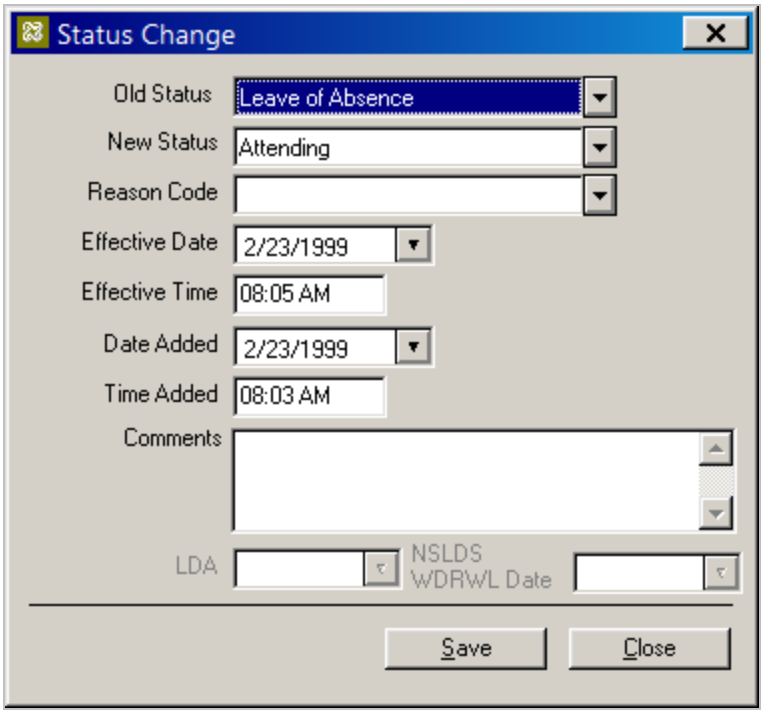
To edit a student's status history:

1. Navigate to **Tools > System > Edit Student Status History**. The Edit Student Status History form is displayed.
2. Click **Search Student** to find the student for whom you want to edit the status history (or select the student before you open the form).



3. **Add**, **Edit**, or **Delete** status history records for the student, including Admissions and Enrollment records.

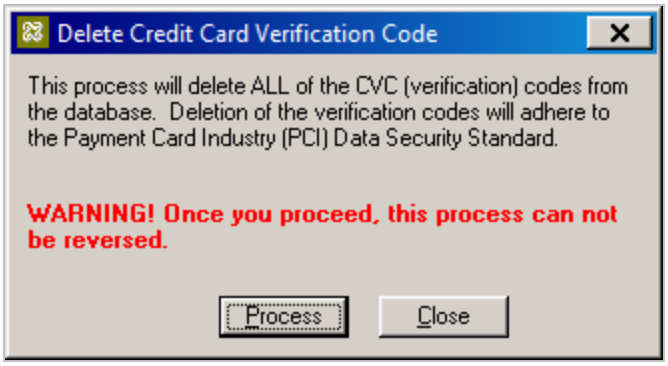
   When you click Add or Edit, the Status Change form is displayed.



4. Complete the fields on the Status Change form and click **Save**.
5. Click **Close** to close the form.
6. To view the student's status change history, navigate to **View > Admissions >** Status History.

Delete Credit Card Verification Code

1. Navigate to **Tools > System > Delete Credit Card Verification Code**. This option initiates a process that deletes all credit card verification codes. The following warning is displayed:



2. Click **Process** to proceed.
3. Click **Close** to close the form.

Export Student Data for Talisma Fundraising

Student information can be exported from CampusNexus Student to Talisma Fundraising. The export adds records to the Talisma Fundraising database for recruiting and fund raising purposes. The export functionality accommodates various student selection criteria based on client needs.

To set up the Talisma Fundraising integration:

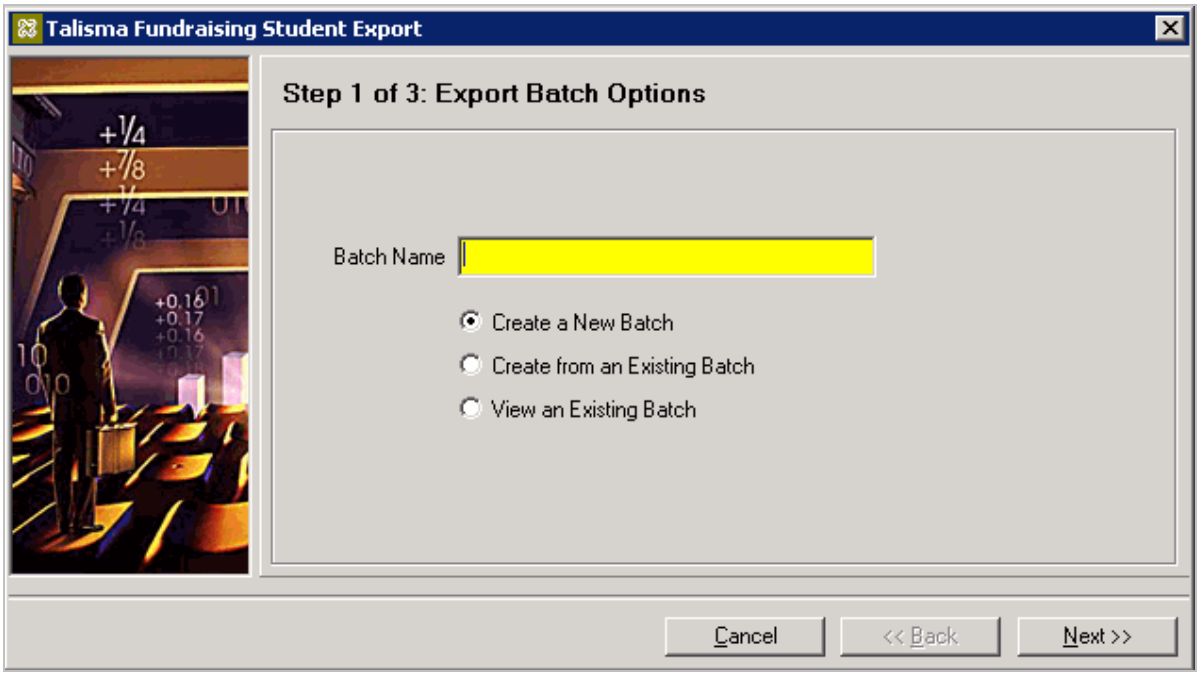
1. Navigate to **Setup > System**. The Systems Settings form is displayed.
2. On the File Server tab, click Configure Web Service Locations.
3. Select the CampusNexusFinance/Talisma Fundraising tab.
4. Enter two Web Service locations to enable CampusNexus Student/Talisma Fundraising integration.

The Data Conversion Resource Center (DCRC) application provides a smooth transition of data from CampusNexus Student to Talisma Fundraising. Using the DCRC application, the system administrator can map fields between the two applications and translate values between the two databases. For example, a Previous College value of 'X of Y' in the CampusNexus Student database could be mapped to 'XY' in the Talisma Fundraising database.

For more information on using the DCRC application, see the Help menu in the DCRC application. Technical details regarding the initial installation and configuration of the CampusNexus Student/Talisma Fundraising Integration can be found in the Talisma Fundraising Installation Guide.

To use the Talisma Fundraising Student Export wizard:

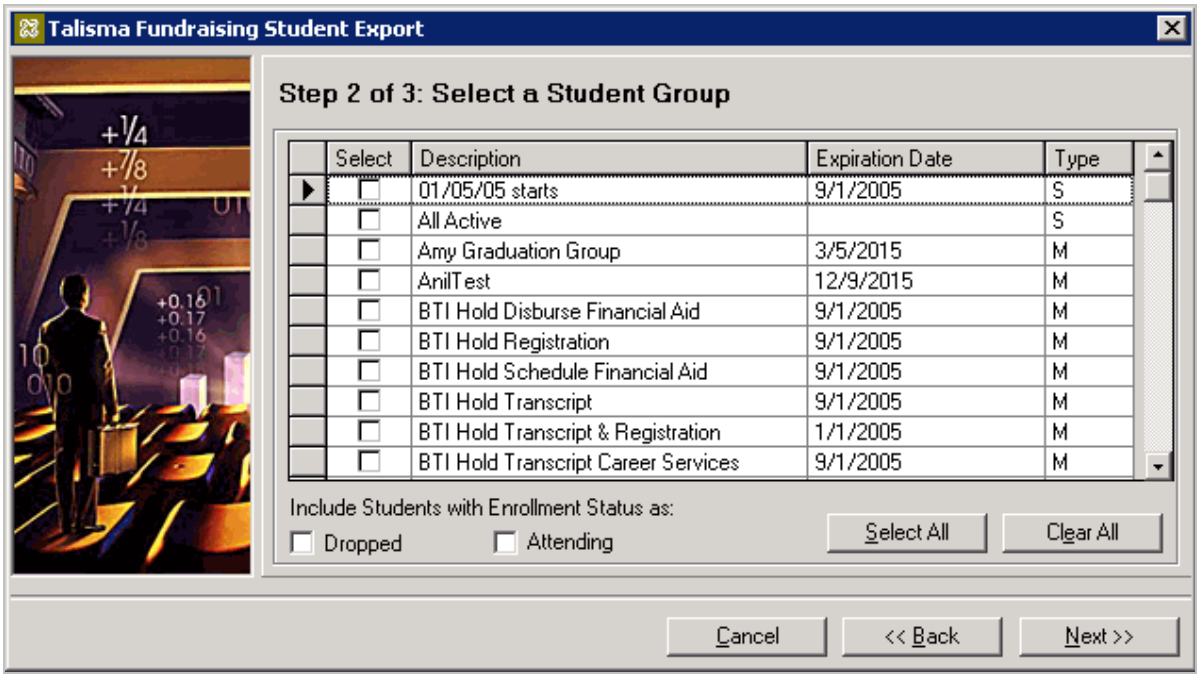
1. Navigate to **Tools > System > Export Student Data for Talisma Fundraising**. Step 1 of the Talisma Fundraising Student Export wizard is displayed. You can Create a New Batch, Create from an Existing Batch, or View an Existing Batch.



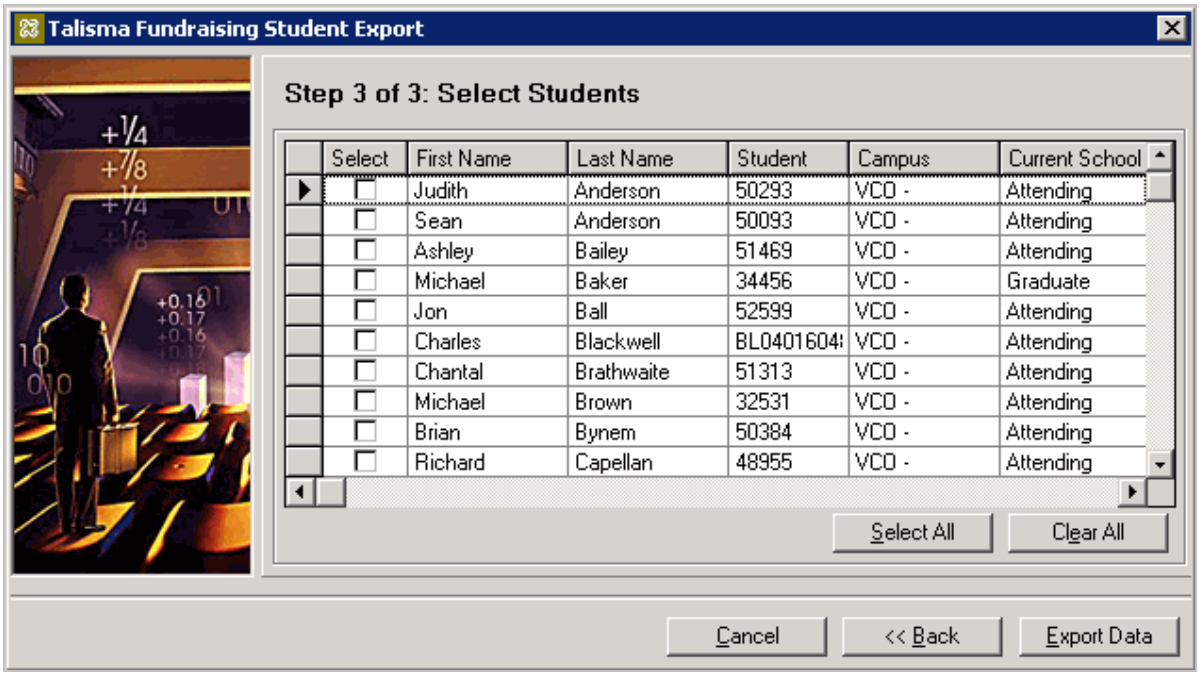
2. **To Create a New Batch**:

a. Specify a **Batch Name**, click **Create a New Batch**, and click **Next**.

b. In Step 2, select the **Student Groups**, select the **Enrollment Status** (Dropped or Attending), and click **Next**.



c. In Step 3, select the **Students** and click **Export Data**. After the export is complete, the wizard displays the exported students and the results of their export.



Notes:

- You can select or deselect student(s) to include in the export without impacting the original student group created. The information passed to Talisma Fundraising is gathered based on each student ID within the selected student groups and formatted accordingly. A unique export batch ID is associated with each export batch and used for tracking purposes.
- Duplicate checks are performed within each student group selected for export to ensure the same student information record is not exported more than once in the same file. If a student has multiple enrollment records that satisfy the export criteria, the export contains a student information record with multiple enrollment records and associated statuses.
- If a student's record is exported and the student already has a record in Talisma Fundraising, the placement and academic information is updated in Talisma Fundraising, but the student's address information is not updated.

3. **To Create from an Existing Batch**:
    a. Specify a **Batch Name** for the new batch that you are creating. The batch name must be different from any previous batch names.
    b. Click **Create from an Existing Batch** and click **Next**.
    c. In Step 2, select a **Batch**. An arrow is displayed to the left of the selected batch. Click **Next**.
    d. In Step 3, select the **Students** and click **Export Data**.
4. **To View an Existing Batch**:
    a. Click **View an Existing Batch** and click **Next**. A list of existing batches is displayed with Batch ID, Description (Batch Name), Number of Students, User, and the Date the batch was exported.
    b. Click on the **Batch** you want to view and click **Next**. A list of the students in the batch is displayed with Last Name, First Name, Student Number, Campus, Current School Status, and the Last Result of the batch export.

Setup Menu

The Setup menu functions include defining critical system parameters, adding and maintaining staff members, control of security, and several others.

Note: The Setup menu, like all other menus in CampusNexus Student, is controlled by the program's security features. The system administrator (SA) can allow other users access to all or portions of it. Users who belong to the system administrator staff group have access to all functions on all menus.

- System
- Campus Locations
- Staff
- Security
- Status Codes
- Contact Manager
- Admissions
- Financial Aid
- Student Accounts
- Academic Records
- Distance Education
- Career Services
- Housing
- CampusVue Finance
- Report Maintenance
- Web
- Data Dictionary
- School Defined Fields
- Required Fields
- Field Level Security
- Student Pace Evaluation Settings
- Executive Summary Report

Setup > System

When you navigate to Setup > System, the System Settings form is displayed. The system administrator can configure the system parameters as necessary to conform to the policies of the institution. The System Settings form has the following tabs:

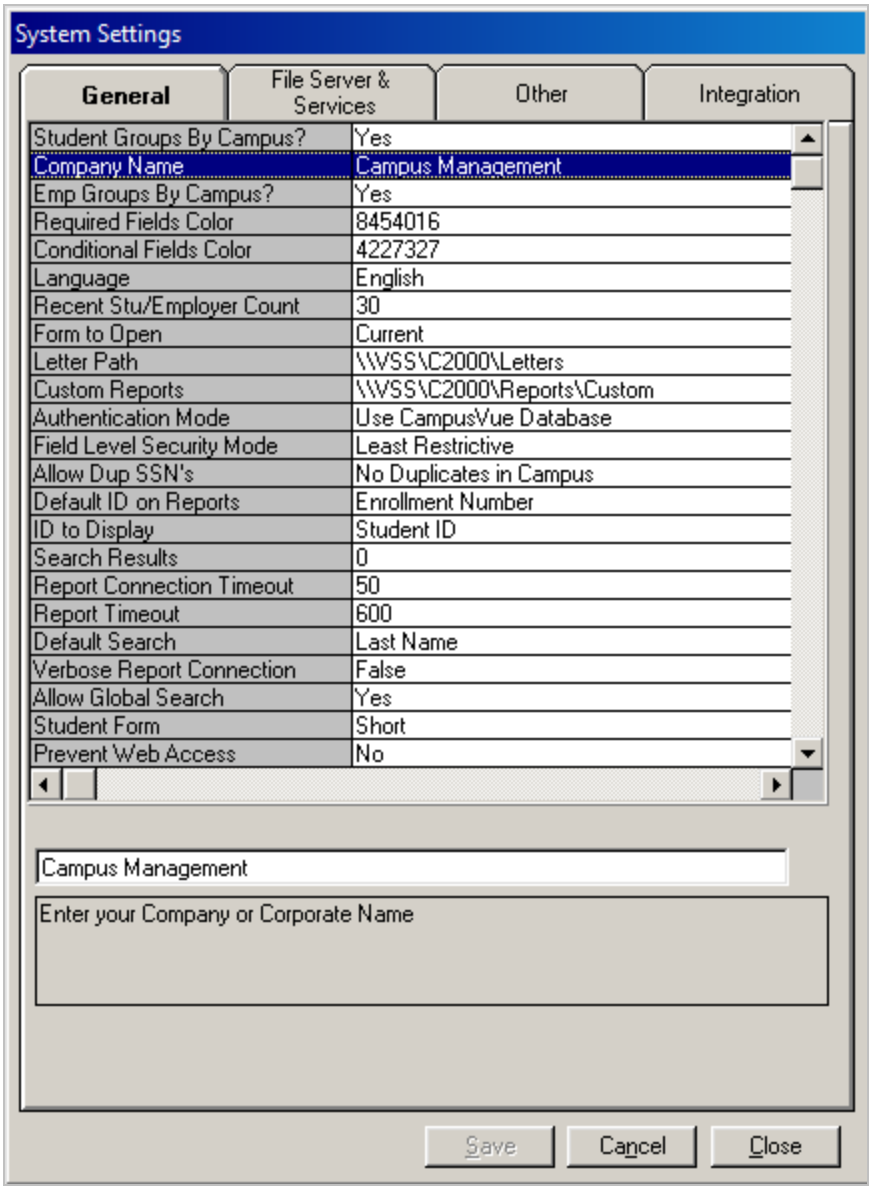
- General Tab
- File Server & Services Tab
- Other Tab
- Integration Tab

System Settings - General Tab

The General tab of the System Settings form contains general configuration parameters for the CampusNexus Student system.

To edit the system parameters on the General tab:

1. Navigate to **Setup > System** and select the **General** tab.



2. On the General tab, click the setting you want to edit. Scroll down to see additional settings.

   Read the instructions for changing a setting in the text box near the bottom of the form. For more information, see Field Descriptions.

3. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Field Descriptions

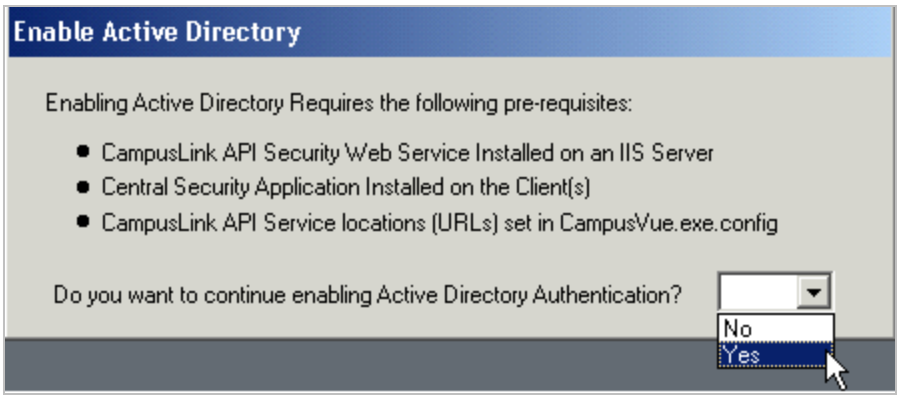
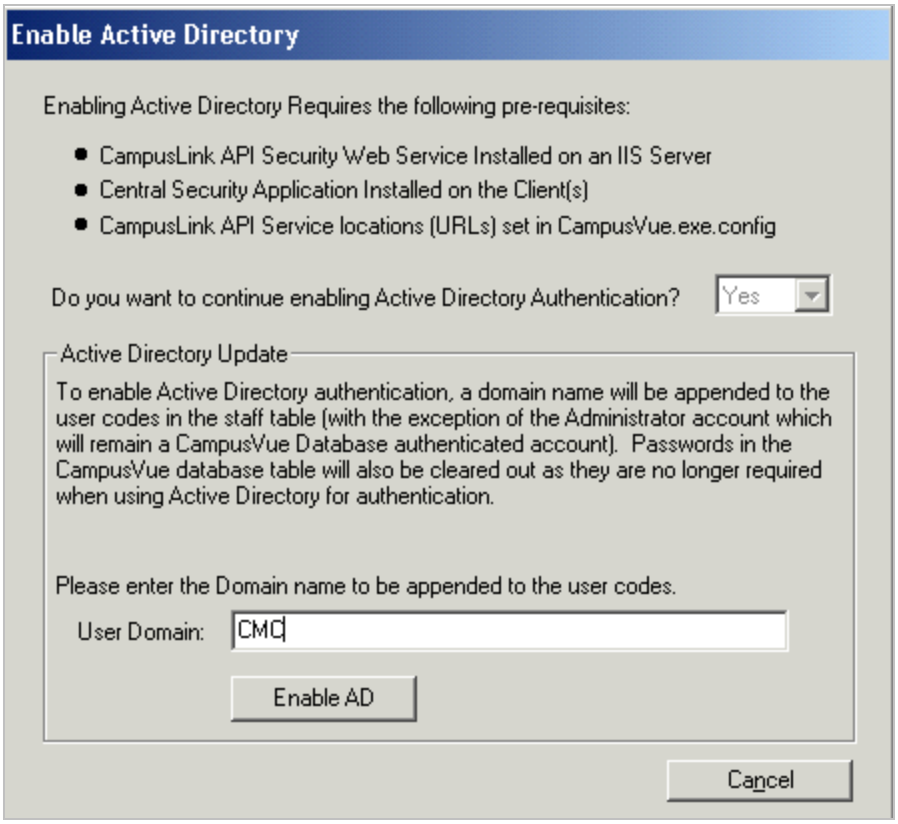
Field	Description
Company Name	Enter the Corporate, Company, Institution, or Campus name as you want it to appear at the top of the CampusNexus Student main window. This name also appears at the bottom of generic reports provided with CampusNexus Student.
Student Groups By Campus?	To limit the user's access to student groups to the user's own campus group, select **Yes**. If you want users to have access to student groups across all campuses, select **No**.
Employer Groups By Campus?	To limit the user's access to employer groups to the user's own campus group, select **Yes**. If you want users to have access to employer groups across all campuses, select **No**.
Required Fields Color	This setting controls the background color of data entry fields that are required by your institution. When you select this setting for change, a button appears below the settings list box. Click **Click to change** to display a color selection chart. Select the color from the basic colors, custom colors, or color spectrum. Click **OK** to save your color selection. Click **Cancel** to close the color selection dialog box without changing the previously selected color. See Required Fields for more about marking fields as required.
Conditional Fields Color	This setting controls the background color of data entry fields that are *conditionally* required by your institution. When you select this setting for change, a button appears below the settings list box. Click **Click to change** to display a color selection chart. Select the color from the basic colors, custom colors, or color spectrum. Click **OK** to save your selection. Click **Cancel** to close the color selection dialog box without changing the previously selected color.
Language	This setting controls the language in which the labels on forms are displayed. Select a language from the list box that appears below the settings list.
Recent Stu/Employer Count	This setting controls the maximum number of students or employers that are listed when a user clicks on the Recent Students (or Recent Employers) list box above the CampusNexus Student work area. Enter the number of students or employers to store in the list. Use the spinner arrows to increase or decrease the number.

Field	Description
Form to Open	This setting controls which form is opened when you select a student from the recent student listing. A registry key has been added to the setup form to select which form is to be opened. Options are: 1. Current (default) 2. Student Master 3. None "Current" means to open another copy of the current form (if it is a student related form) and display the information for the student selected from the list. For example, if the Enrollment Form is displayed for student John Doe, and you select Bill Collins from the recent student list, another copy of the enrollment form is opened with Bill Collins' information. If the current form happens to be a form like "Class Scheduling" (Daily / Academic Records / Class Schedules), when you select a student from the list, the Student Master opens. "Student Master" means to always open the Student Master form for the student selected from the recent student list. "None" means that no form is opened automatically. With this setting, you can select a student from the recent student list and the system does nothing except set the student as the current student. You can then select a folder from the Student Bar or the View menu to open a specific student form. If you change the setting, you must exit from CampusNexus Student and log on again to see the effect of the change.
Letter Path	Enter the path to be used to store letter documents. Letters created through the interaction of CampusNexus Student and Microsoft Word are stored in this directory. Mail Merge checks this directory for letters when you are sending them to lists of recipients. See Letter Activity, Print Letters Overview and Employer Letters Overview.
Custom Reports	Enter the path to be used to store custom reports designed for or by your institution. When a user selects a report,CampusNexus Student checks this folder for a report file with the appropriate name (for instance, a customized transcript). If the program does not find such a report in your Custom Reports folder, it checks the system reports folder.

Field	Description
Authentication Mode	The Authentication Mode contains four options. The selection of these options affects the Sign-In form, Cashier ID Check form, and Session Parameters form when authenticating users. When Active Directory is enabled with single sign-on option, the Sign In dialog is not displayed. The username@domain for the current windows session is passed to the authentication method to get the CampusNexus Student user information. If the username@domain is *not* found in CampusNexus Student, the user is *not* allowed to execute CampusNexus Student using the current account. When Active Directory is enabled without single-sign-on, the Sign In dialog is displayed. The username@domain is displayed in the User Name field as read-only. The user is required to enter a password for his/her domain account. The username@domain and the supplied password are passed to the authentication method to get the CampusNexus Student user information. If the username@domain is *not* found in CampusNexus Student, or if the password does *not* match the user's domain password, the user receives an "Access Denied" message and is prompted to re-enter the password. An additional button labeled Options >> is displayed in this mode. The user can click this button to change the authentication mode to **Use CampusNexus Student Database**. This allows the user to sign-in with the Administrator account. The Administrator account remains a database account even when Active Directory is enabled. **WARNING:** When you change to Active Directory Mode, the user code is appended with @DOMAINNAME, and the passwords are cleared in the CampusNexus Student database. Changing back to the **Use CampusNexus Student Database** mode require manual works. Passwords need to be set on all users, and the @DOMAINNAME suffix needs to be cleared from the User code. None of this is supported through the CampusNexus Student interface; it requires a support call, and someone working with the institution to execute scripts at the database level. With Active Directory, the user cannot change the User Name field. To "run as" a different user, the user can do one of two things: 1. Sign-in to the Windows workstation (or Citrix server) using another account to execute CampusNexus Student. 2. On a Windows workstation, right-click the CampusNexus Student menu, or desktop item, and select "Run as ..." from the context menu. For any staff member to run CampusNexus Student, the staff member's password must contain more than six (6) characters. If no password is entered in the staff file setup, it is assumed that the staff member will not be using CampusNexus Student. Staff members who do not actually use CampusNexus Student are listed in the system so that they may be assigned to classes as instructors or for other administrative duties such as advisors, etc.
Use CampusNexus Student Database	Formerly, Database, this setting is now referred to as **Use CampusNexus Student Database**. A staff member's user name and password from the CampusNexus Student database is used to authenticate the user when logging on. The user name is displayed upon entering the Sign-in window followed by a prompt for a password.

Field	Description
Use Windows Login (Non-AD)	Formerly, Use NT Security, this setting is now referred to as **Use Windows Login (Non-AD)**, and determines whether CampusNexus Student recognizes users who log on to the Windows operating system as being authorized users. This option is built in and uses the local computer account to match the staff member user's account in the CampusNexus Student database. If this setting is selected, then the Sign In program compares the user's Windows log on ID to the list in CampusNexus Student. If the program finds an ID match, the user is automatically logged on to CampusNexus Student without having to enter the ID and CampusNexus Student password again. CampusNexus Student does not match the password in Windows to the password in CampusNexus Student. The Sign In program only checks if the password in CampusNexus Student contains more than six (6) characters. If the user is allowed access to your Windows domain and has a record in the staff file, the user is trusted in CampusNexus Student. This setting does not affect the other security provisions of the CampusNexus Student system such as access to menus and permission to read and write data. If a staff member logs in to Windows with a password that is not recognized by CampusNexus Student, a message is displayed when the program is started. The staff member then has to enter a valid ID and a valid password. If the Use CampusNexus Student Database authentication option is selected, passwords and policies are enabled as well.
Use Active Directory	Account Management may be facilitated in a central location when the Active Directory is enabled. If so, password changes are *disabled*. This is the default option for Active Directory. When you sign in, CampusNexus Student displays the user's user name in the username@domain format for the current windows session. The user is *not* allowed to modify the user name, and is prompted to enter the windows domain password. **Note**: An "Administrator" account is still of "database" type. **WARNING:** Selecting this option does not allow the institution to revert the configuration to Use CampusNexus Student Database or Use Windows Login (Non-AD), since all accounts passwords are encrypted one way in the Active Directory storage.

Field	Description
Use Active Directory (single sign-on)	Please read the Active Directory Assumptions, Dependencies, Constraints section below first. Account Management may be facilitated in a central location when the Active Directory (single sign-on) is *enabled*. This option does *not* prompt the user for credentials. The current windows session information is used to authenticate the user and sign-in to CampusNexus Student. If the username@domain is *not*defined in the CampusNexus Student database, the user is *not*allowed to execute CampusNexus Student using the current credentials. **Note**: An "Administrator" account is still "database" type. **WARNING:** Selecting this option does not allow the institution to revert the configuration to Use CampusNexus Student Database or Use Windows Login (Non-AD), since all accounts passwords are encrypted one way in the Active Directory storage. **Active Directory Integration** When configured to use the Windows Directory Services, CampusNexus Student provides direct authentication against Active Directory. The goal is to create a seamless integration between CampusNexus Student and Windows authentication services already in place for each institution, and not to manage them. The CampusNexus Student role will be solely to integrate with the directory services for authentication processing. When Active Directory is enabled in CampusNexus Student, the Password Profiles functionality is replaced by the Windows Domain policies. **Password Change** • CampusNexus Student users can only change their passwords if the database is configured as authentication storage. • Portal users can only change passwords through the Faculty Portal when Active Directory is enabled. **Password Encryption** All passwords are changed to use hashing in the database. Authentication credentials are stored in a *new* users table that will eventually consolidate all types of users. **Portal Database Dependency** Portal authentications for Faculty members are validated against the CampusNexus Student database, while the Student, Applicant, and Employer accounts are validated against the Portal database. **To enable Activity Directory (single sign-on)** Select the '*Use Active Directory (single sign-on)*' option, and click **Save**. The following message is displayed.

Field	Description
	 When **Yes** is selected from the "Do you want to continue enabling Active Directory Authentication" drop-down list, CampusNexus Student requests additional information.  After the User Domain field is entered and the Enable AD button is selected, a confirmation message states: *The update to Active Directory is completed.* CampusNexus Student appends an ampersand (@) and the User Domain entered to each staff member's User ID (i.e., 'staffmember@CMC'). **Note**: When you change to Active Directory Mode, the system appends the text entered in the User Domain to each staff member's UserID (i.e., @DOMAINNAME), and the passwords are

Field	Description
	cleared. Changing back to Use CampusNexus Student Database mode requires manual work. Passwords need to be set on all users, and the @DOMAINNAME suffix needs to be cleared from the UserID field. None of this is supported through the CampusNexus Student interface; it will require a support call and someone working with the institution to execute scripts at the database level. **Active Directory Assumptions, Dependencies, Constraints** • CampusNexus Student does not play a role in Staff Active Directory account creation. All Active Directory accounts are created manually by administration personnel, or automatically through the use of third party tools, such as MIIS or Lawson. This approach satisfies the needs of clients that manage all faculty accounts in Active Directory through external software. • CampusNexus Student does not manage or maintain Active Directory accounts for faculty type users. All account status, expiration, lock-outs, and organizational units related to faculty member accounts are managed manually by institution administration or by third-party software. • CampusNexus Student password changes are enabled for the Database Authentication process only. No changes to passwords are allowed when Active Directory is configured. • CampusNexus Student integration with Active Directory is global. All institutions and campuses under the current implementation use the same process of authentication and authorization for faculty staff users. • Once Active Directory integration is in place, CampusNexus Student does not allow changing the user name from CampusNexus Student. All user name changes are done through the Active Directory manager. • The Authentication Service can receive user names with and without the domain name attached to them. If the client submits the user name in the form of username@domain.com, the system uses the domain name specified for the authentication process; otherwise the default domain configured for the API is used. • Secure Sockets Layer should be installed and configured for all instances of the Authentication Web Service providing authentication to CampusNexus Student.

Field	Description
Field Level Security Mode.	This setting controls how Field Level security behaves when a user belongs to more than one staff group and each group has different levels of field-level access. The available options include: • **Most Restrictive** - Field-Level Security operates in the same manner as Staff Group security for multiple security groups. Users assigned to multiple groups receive the MOST restrictive level of security granted in any group to which they have been assigned. For example, a staff member who has read-only capability in the instructor group and edit capability in the advisor group has read-only capability in the instructor group. • **Least Restrictive** - Field-Level Security does not operate in the same manner as Staff Group security for multiple security groups. Users assigned to multiple groups receive the LEAST restrictive level of security granted in any group to which they have been assigned. For example, a staff member who has read-only capability in the instructor group and edit capability in the advisor group has edit capability in the instructor group.
Allow Dup SSNs	The following options are available: • **Yes**. If this setting is Yes, the system allows you to enter a duplicate Social Security Number within the same campus. • **No duplicates in Database**. Choose this setting if you do not want duplicate SSNs anywhere in your CampusNexus Student database. This implies that in multi-campus institutions, a student can only have a master record on one campus. • **No duplicates in Campus**. This option allows duplicate SSNs in the database, but not within the same campus.
ID to Display	Select the **Student ID** or the **Social Security Number** to be displayed beside the student name in the Recent Students text box. Refer to Student ID Format (Setup > Admissions > General (tab)).
Search Results	Enter the maximum number of rows that the search procedure is to return when you use the student search procedure. A zero in this field indicates that all matches are to be displayed in the resulting grid. This does not apply to the employer search tool.
Default ID on Reports	Select the default ID to appear on reports that list students. Select Social Security Number (SSN), Student ID, or Enrollment Number. On most reports, you can change the ID to be displayed at the time the report is requested.
Report Connection Timeout	This setting is used to enter the number of seconds to wait for the database connection.
Report Timeout	This setting is used to adjust the amount of time the system waits for a report query to complete. If your institution is getting time-out errors when running reports, adjust this setting to allow more time for the query to run. The default is 600 seconds (10 minutes).
Default Search	Select the default text box in which the insertion pointer (cursor) is placed when a user starts a new search for student records. Select Last Name, SSN, Student ID, or Enrollment Number.

Field	Description
Verbose Report Connection	This setting is used in conjunction with the Report Timeout setting. If this setting is **True**, it displays the current connection time on the Form Sys Report Selection. The default for the registry is 10 seconds; the default for the database is 20 seconds. If this setting is **False**, the connection time is not displayed.
Allow Global Search	Allow users to search for students across all campuses in the system or limit the search to the user's campus list. If you select **Yes** and user-level permissions are configured to allow Global Search, an additional All Campuses in Database option appears on the search form. See Setup Menu > Staff > Staff Members > User Info Tab > User Info > General sub-tab.
Student Form	Select which Student Master edit form is to be used. Options include: • Short - default form. • Long - used by institutions with long lists of selections for certain fields on the student master. See Edit a Student Master.
Prevent Web Access	This setting controls use of the Help on the Web option on the Help menu. Select **Yes** to restrict Web access. In other words, to remove Help on the Web from the Help menu. Select **No** (default) to leave the option on the Help menu.
Allow Dynamic Groups	If you select **No**, the Dynamic student group type is unavailable when creating new groups. On the Student Group form, if the Allow Dynamic Groups option is No, the program does not allow the group type to be changed to dynamic. The message, "*Dynamic Groups have been disabled by the System Administrator*" is displayed. If you select **Yes**, users can create dynamic groups.
SQL Server	When dynamic groups are in use, the database supports a SQL server job to evaluate dynamic groups and related frequency. The SQL server job provides an option to define a time and recurrence for each frequency in use. The jobs will execute based on their assigned frequency so that dynamic group refresh can occur only on the groups necessary when required and on intervals defined by the user.
Staff Group Permissions	Users can select a default frequency when dynamic groups are in use. Each group contains a property allowing users to define how often each of the dynamic groups needs to be updated - hourly, daily, biweekly, weekly or monthly - which is performed on a regulated basis through the functionality provided by SQL server jobs. The frequency selection available to the user is limited to only those frequencies granted based on the user staff group permissions defined. Users can define any combination of frequency permissions based on these staff groups. Users can also limit the frequency selection by staff group. When creating or editing dynamic groups, users are presented with the frequency options defined within the dynamic group permissions, based on the users' staff groups. New dynamic groups default to the system default frequency, and only users with the correct permissions are able to edit them. Users in multiple staff groups are provided a unique list of all frequencies allowed based on an evaluation of all staff groups the user is associated with. The option to set frequency is disabled when the option to use dynamic groups is not in use.

Field	Description
SEVIS Transmission	This setting controls the transmission by School Code, Campus, Campus Group, or Program Number.
Enable SEVIS Extract	This setting, when set to Yes, enables you to extract the SEVIS information.
SEVIS Extract Folder	Enter the location where SEVIS extract files are saved.
SEVIS Eligibility Folder	Enter the location where eligibility forms should be saved so that CampusNexus Student can associate them with the student.
Enter EDE Path	Enter the path where folders for exported files should be saved. • For Financial Aid Automation (FAA) applications, enter a UNC-compliant path (`\\<computer name>\<shared directory>\`). • For non-FAA applications, the path does not have to be UNC-compliant, that is, it can be mapped to a drive letter (e.g., `E:\<shared directory>\`). Select **Help > About > More Info** to view the current server path.
EDE Archiving Frequency	Choose how often files in the EDE Path should be archived into subdirectories. Options are **Never**, **Daily**, **Weekly** (default), and **Monthly**.
User Toolbar Icon Folder.	Enter the path where the folder containing static data elements from student records and shortcuts to frequently used processes should be saved.
FERPA document?	The Family Educational Rights and Privacy Act is a Federal law that protects the privacy of student education records. This law applies to all institutions that receive funds under an applicable program of the U.S. Department of Education. FERPA gives eligible students certain rights with respect to their education records. Select 'Yes' to indicate that the student would like to be exempt from FERPA directory information disclosure. The student record is saved with Data Block designation, the date the change was made, and an "F" is displayed on the student bar next to the hold status icon. If a user clicks on the "F" (FERPA) icon, CampusNexus Student opens the FERPA Information Request form displaying the list of fields in the campus-level FERPA group that the student has elected to block and the list of any addresses that have been designated to allow FERPA academic fields. See FERPA Document Setting and Address Types to set up a FERPA address type.
Allow Emp Global Search?	Select **Yes** to allow Employer searches across all campuses in the system, or **No** to limit the search to the user's Campus List.

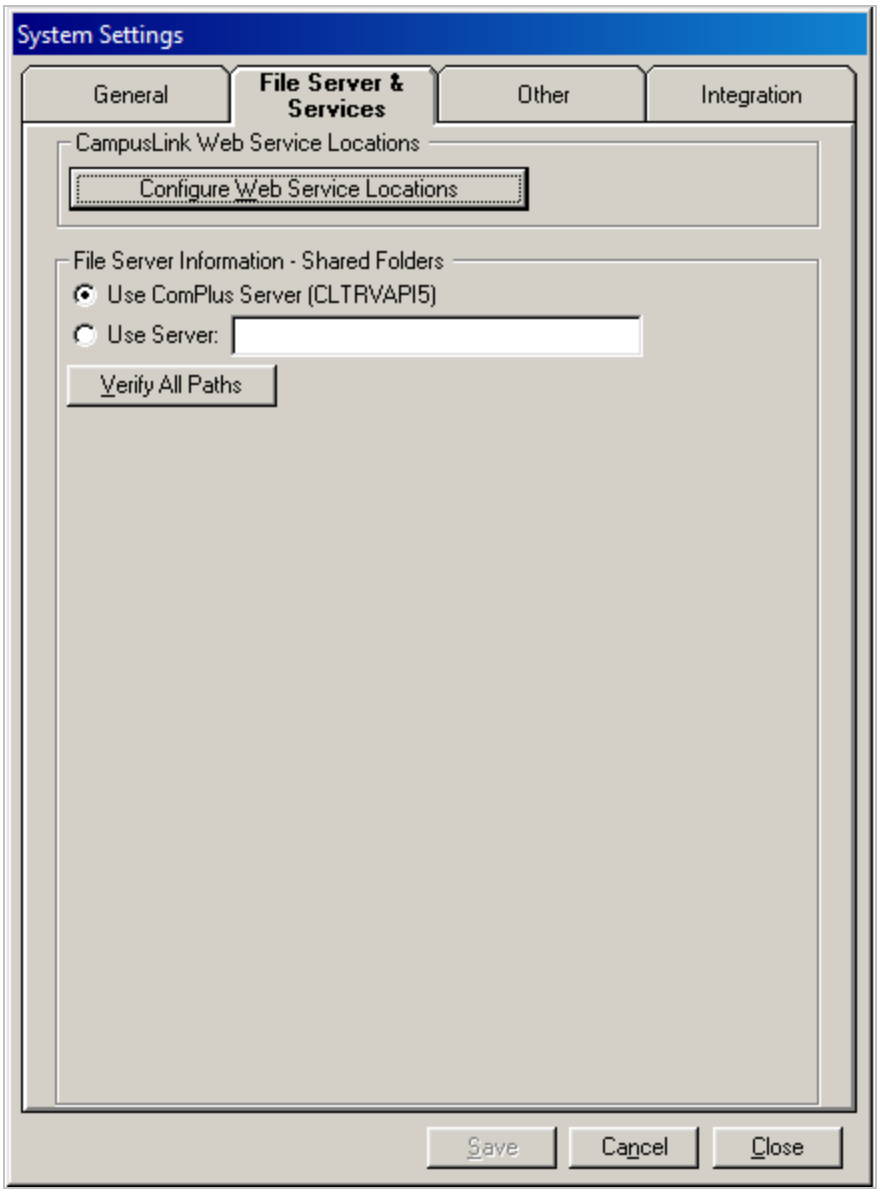
Field	Description
Require Audit Comment?	This selection indicates whether staff is required to enter a comment when updating audited placement fields. The following options are available: • **Never** - comments are not required except when records are being deleted. • **Required Fields Only** - the user must enter a comment when updating required fields or deleting records. This is the default setting. • **Always** - the user must enter a comment any time an update is made or a record is deleted.
Logoff After Pwd Change?	Choose **Yes** to force the user to log off after making a successful password change. If the setting is **Yes**, the change password window indicates that the user is logged off after changing the password. If the setting is **No**, the change password form will work in the same manner as before, and not log the user off.
Data Web Service URL	Enter the URL for the applicable data web service.
Automated User	Refers to a user who has permission for Automated Processes and can be selected from the drop-down list to resolve Exception Processing Auto Resolve Type III exceptions. The system assigns all exceptions that are auto resolved by the pool to the Automated User except for the original exception that was resolved.

System Settings - File Server & Services Tab

This tab stores the server name where the CampusNexus Student share resides. The tab also is used to define the Middle Tier Web Service URL locations and service names used for API services, CampusNexus Student/Portal Integration, CampusVue Finance, HR & Payroll or CampusNexus Finance, HR & Payroll/Talisma Fundraising, WCF Integration and Custom Integrations.

To configure the file server settings:

1. Navigate to **Setup** > **System** and select the **File Server & Services** tab.



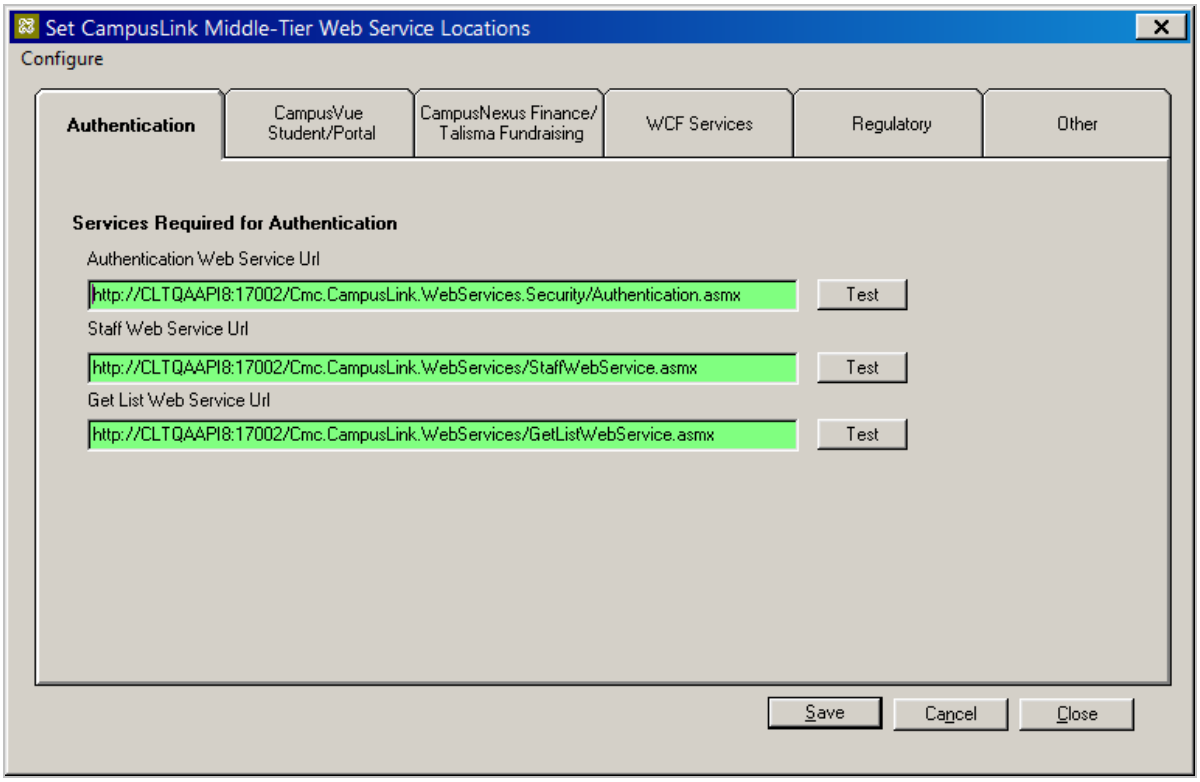
2. Select **Use ComPlus Server** (default) or **Use Server**. If you select Use Server, enter the name of the server.
3. Click **Verify All Paths**. CampusNexus Student verifies the paths.
4. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

To configure Web Service locations:

1. Click the **Configure Web Service Locations** button. The Set CampusLink Middle-Tier Web Service Locations form is displayed.

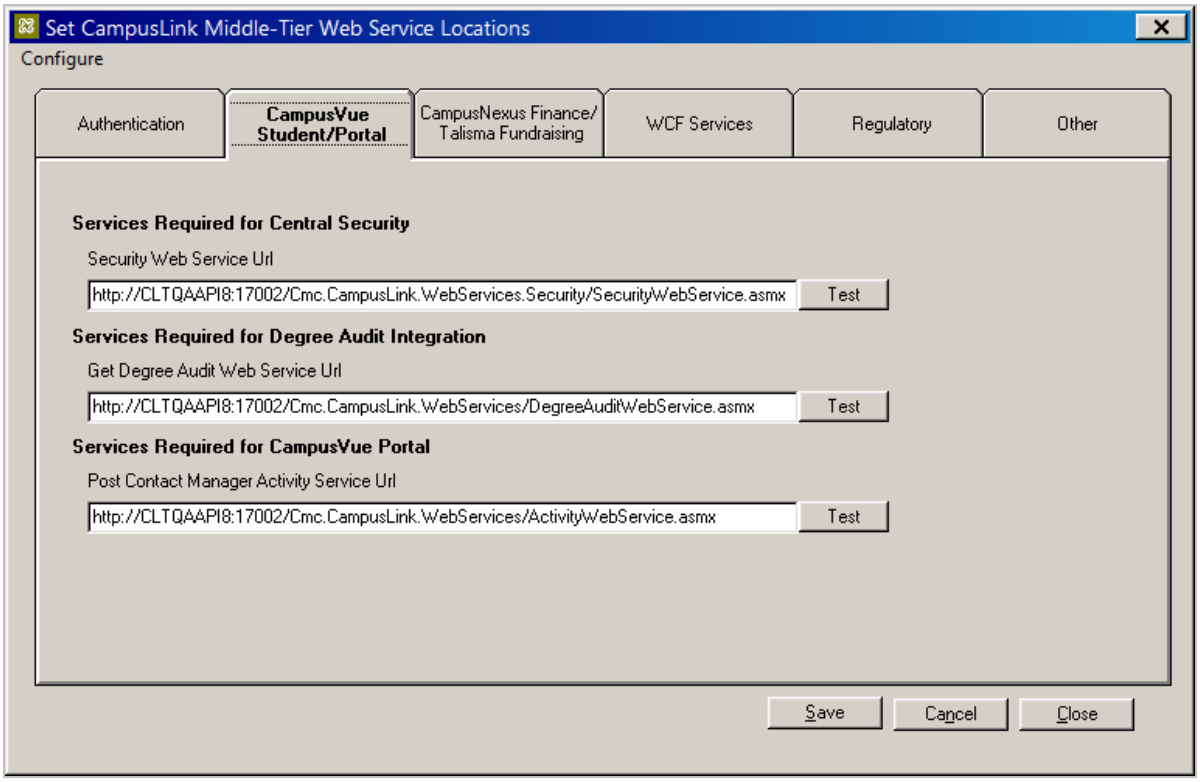
   The **Authentication** tab contains fields for:

   - Authentication Web Service URL
   - Staff Web Service URL
   - Get List Web Service URL



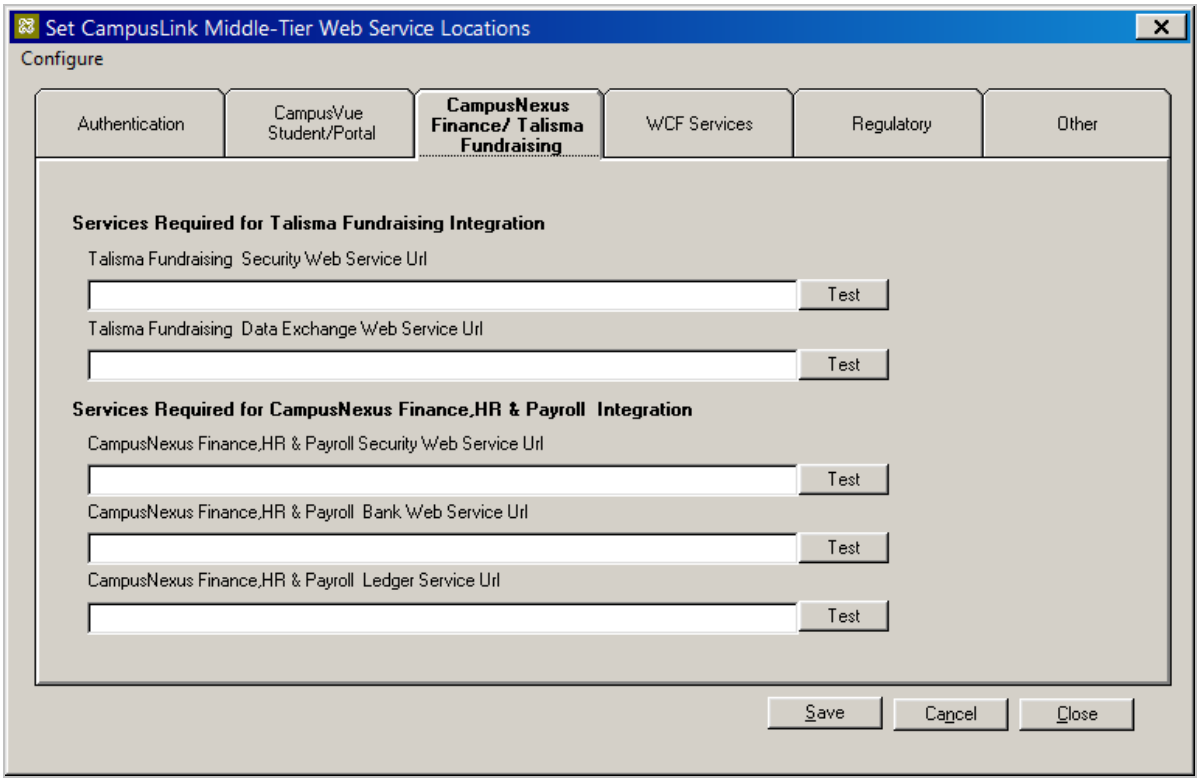
   The **CampusNexus Student/Portal** tab contains fields for:

   - Security Web Service URL
   - Degree Audit Web Service URL
   - Contact Manager Activity Service URL



The **CampusNexus Finance / Talisma Fundraising** tab contains fields for:

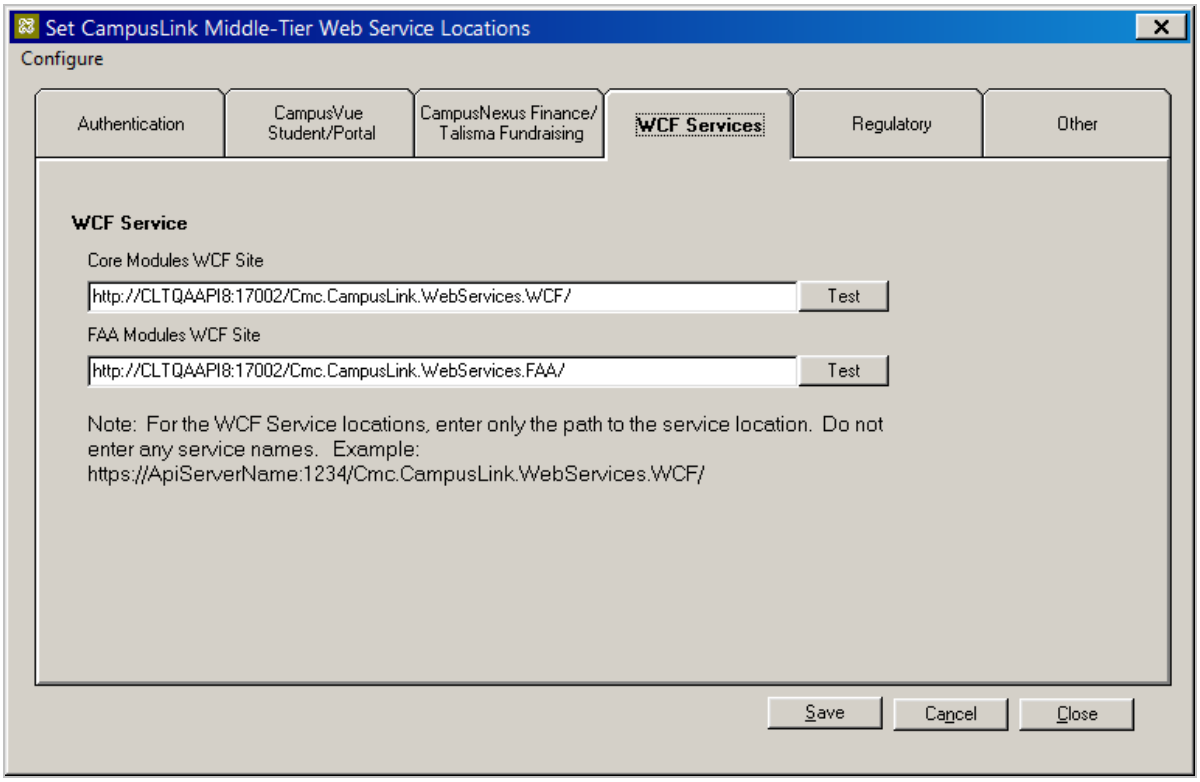
- Talisma Fundraising Security Web Service URL
- Talisma Fundraising Data Exchange Web Service URL
- CampusNexus Finance, HR & Payroll Security Web Service URL
- CampusNexus Finance, HR & Payroll Bank Service URL
- CampusNexus Finance, HR & Payroll Ledger Service URL



Note: When integration of CampusNexus Student with CampusNexus Finance, HR & Payroll is enabled (see GL/AP Package), the tab is labeled **CampusNexus Finance / Talisma Fundraising** and the **Services Required for CampusNexus Finance, HR & Payroll Integration** fields are labeled accordingly.

The **WCF Services** tab allows contains fields for:

- Core Modules WCF Site
- FAA Modules WCF Site

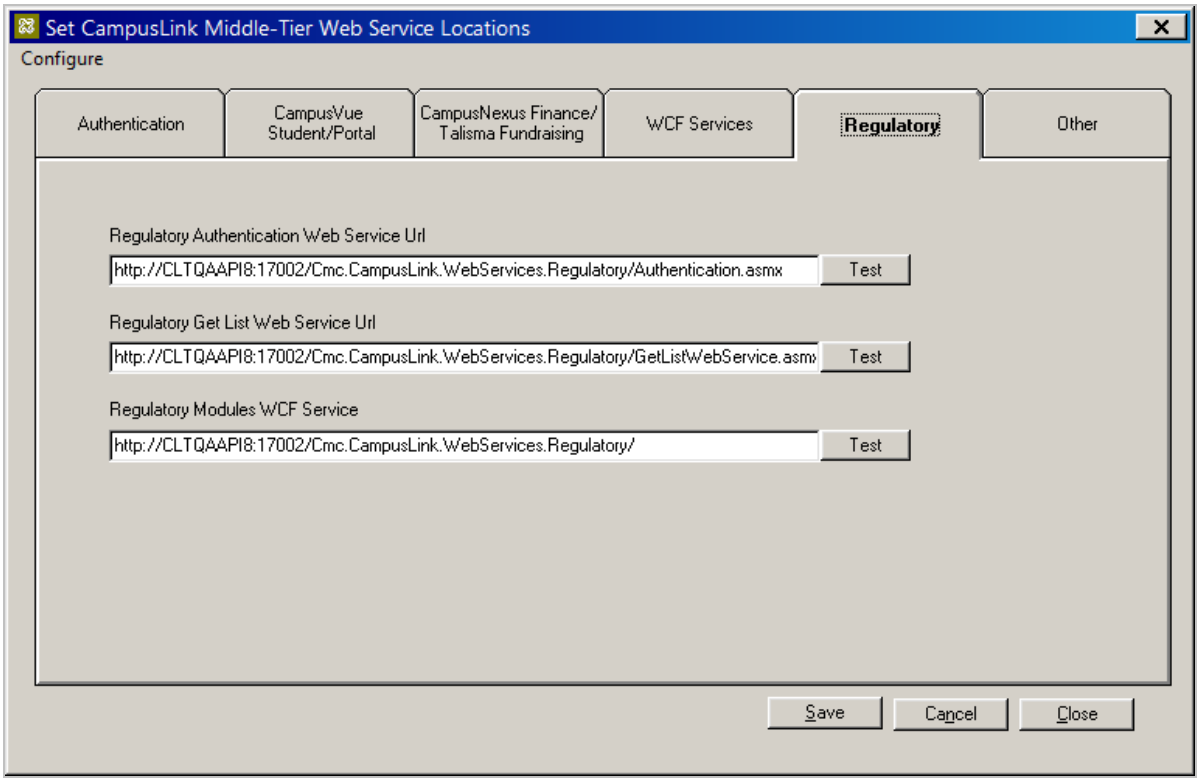


Note: For WCF Service locations, enter only the path to the service location. Do not enter any service names.

Example: `https://APIServerName:1234/Cmc.CampusLink.Webservices.WCF/`

The **Regulatory** tab contains fields for:

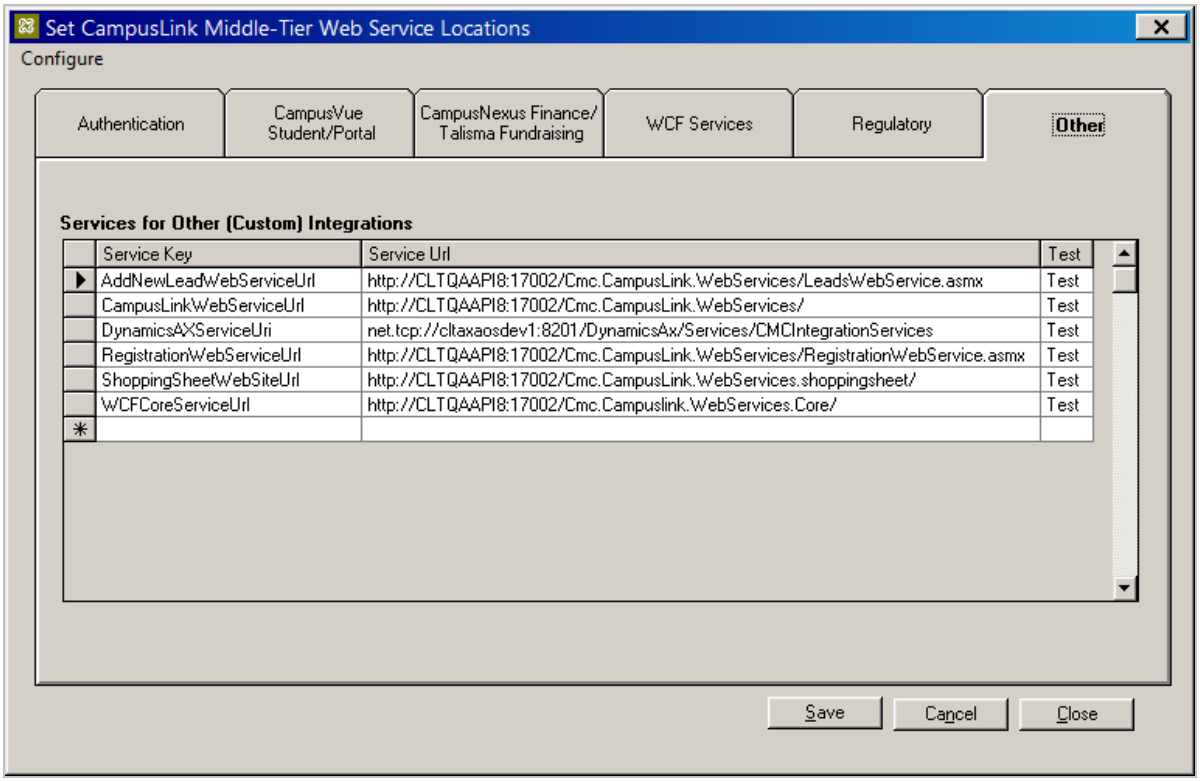
- Regulatory Authentication Web Service URL
- Regulatory Get List Web Service URL
- Regulatory Modules WCF Service



Note: For the WCF Service locations, enter only the path to the service location. Do not enter any service names.

Example: `https://APIServerName:1234/Cmc.CampusLink.Webservices.WCF/`

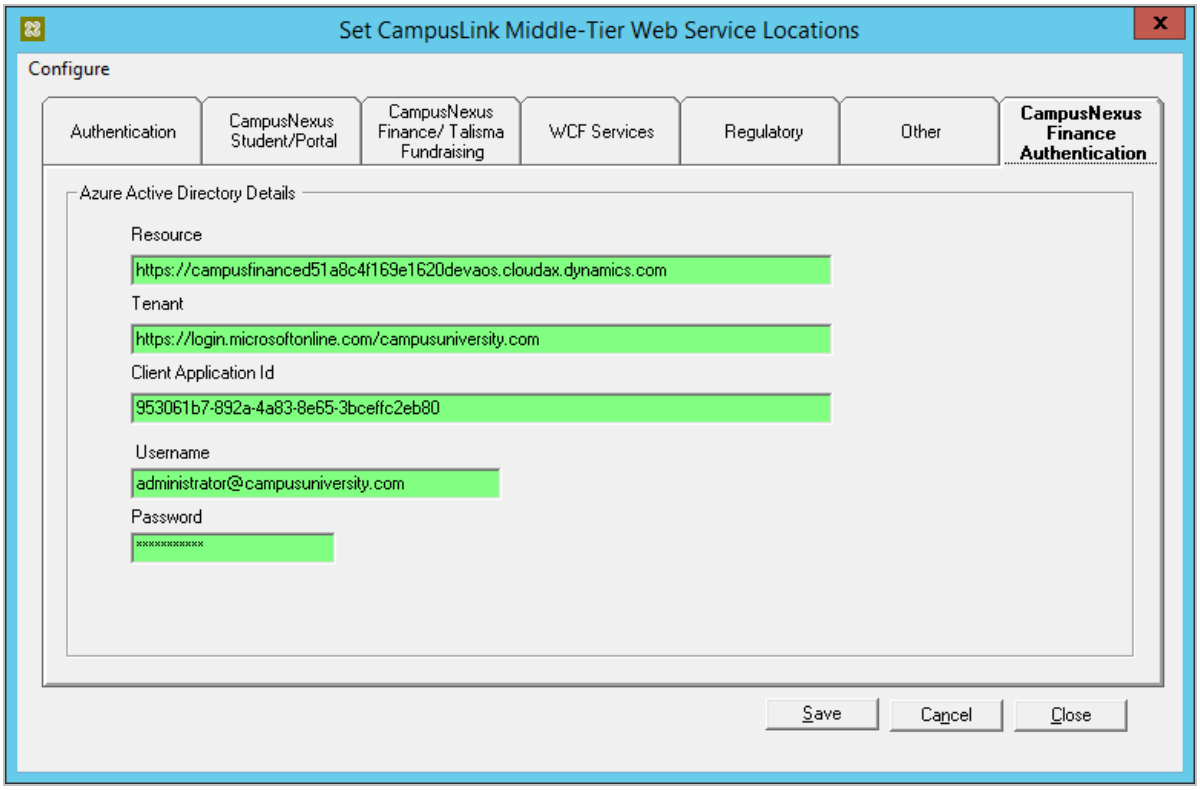
The **Other** tab contains fields for Service Keys and Service URL Location fields for Other (Custom) Integrations:



The **CampusNexus Finance Authentication** tab displays Azure Active Directory details, which is used by CampusNexus Student application to communicate with the CampusNexus Finance, HR & Payroll web services.

Following are the fields in this tab:

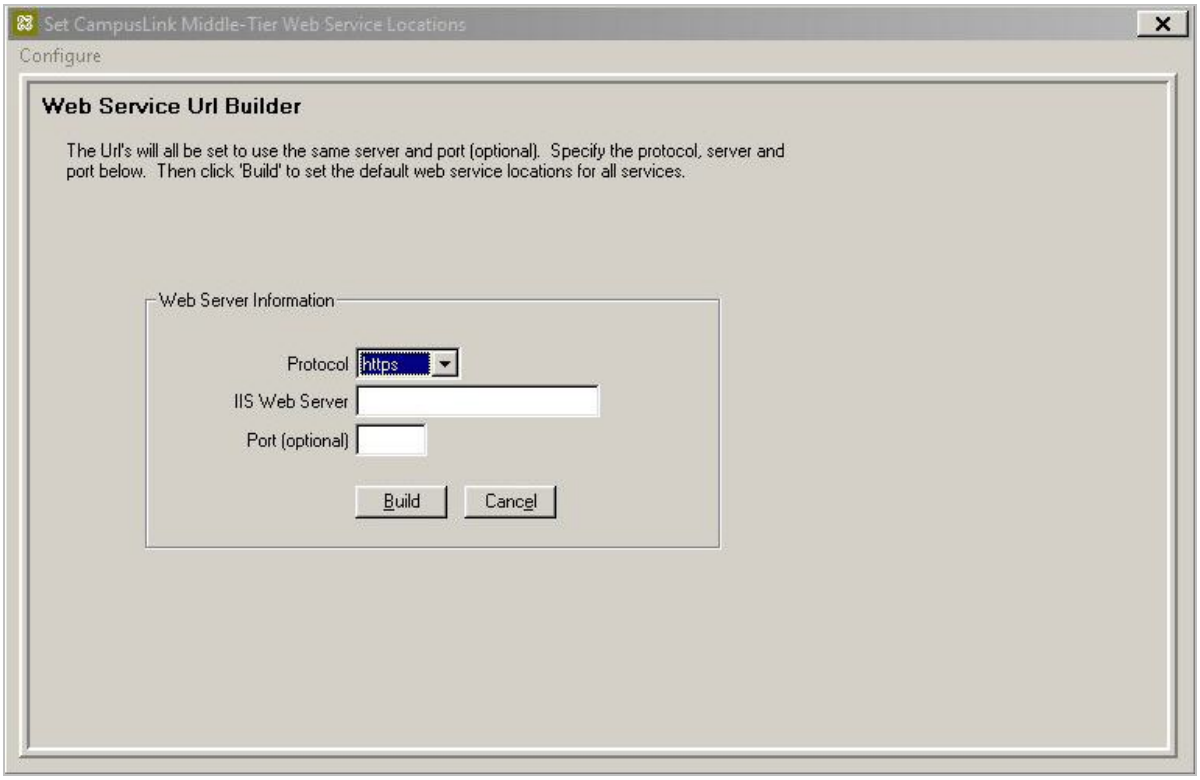
- Resource - The URL of the cloud-hosted environment where the CampusNexus Finance, HR & Payroll solution is deployed.
- Tenant - The Azure Active Directory (AAD) instance created for your organization on Microsoft Azure.
- Client Application Id - The Client ID information that is generated while registering a native application with the AAD of your organization.
- Username and Password - The user credentials existing in the AAD,



2. Select the appropriate tab to configure a Web Service. For each of the Web Services that applies to your configuration, enter a URL in the form of:

   `https://{APIServerName:port}/{service path}/{servicename}.asmx`

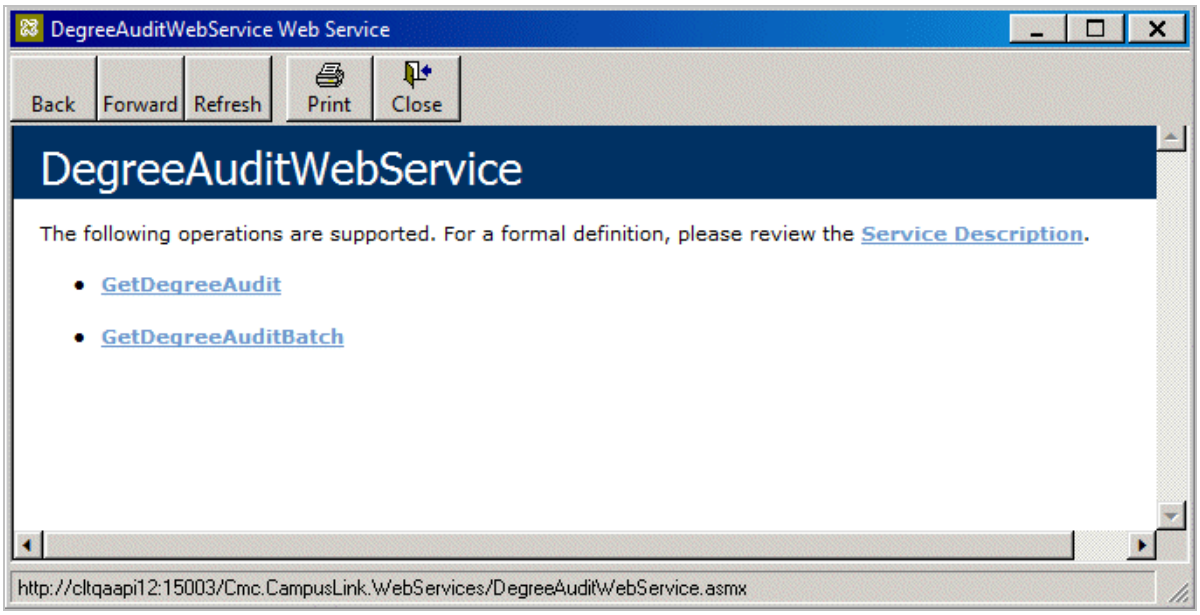
   a. To enter a URL, click the **Configure** link in the top left hand corner of the tab and select **Use Builder**. The Web Service URL Builder form is displayed.



b. Specify the **Protocol**, **IIS Web Server**, and **Port** (optional).

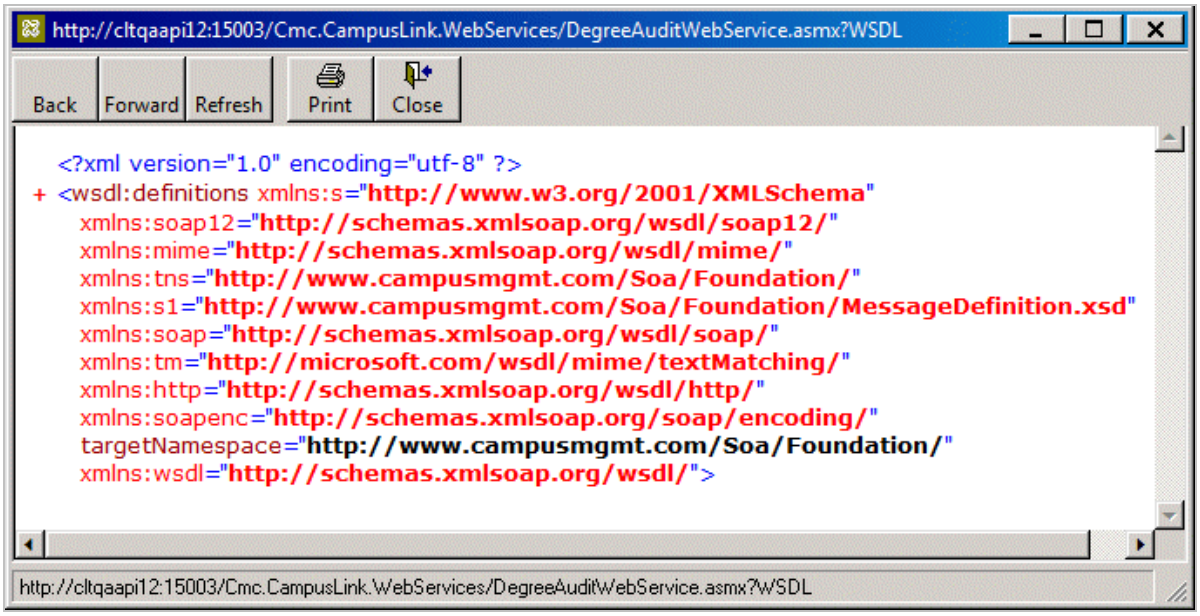
c. Click the **Build** button. The URL is loaded in the proper format and the Web Service URL Builder form is closed.

3. In the Set CampusLink Middle-Tier Web Service Locations form, click the **Test** button next to the Web Service location you entered. If the service is valid, a form identifying the service and listing the operations it supports is displayed.



4. Click the **links** in the page identifying the service and listing the operations it supports. The WSDL associated with

the service is displayed.



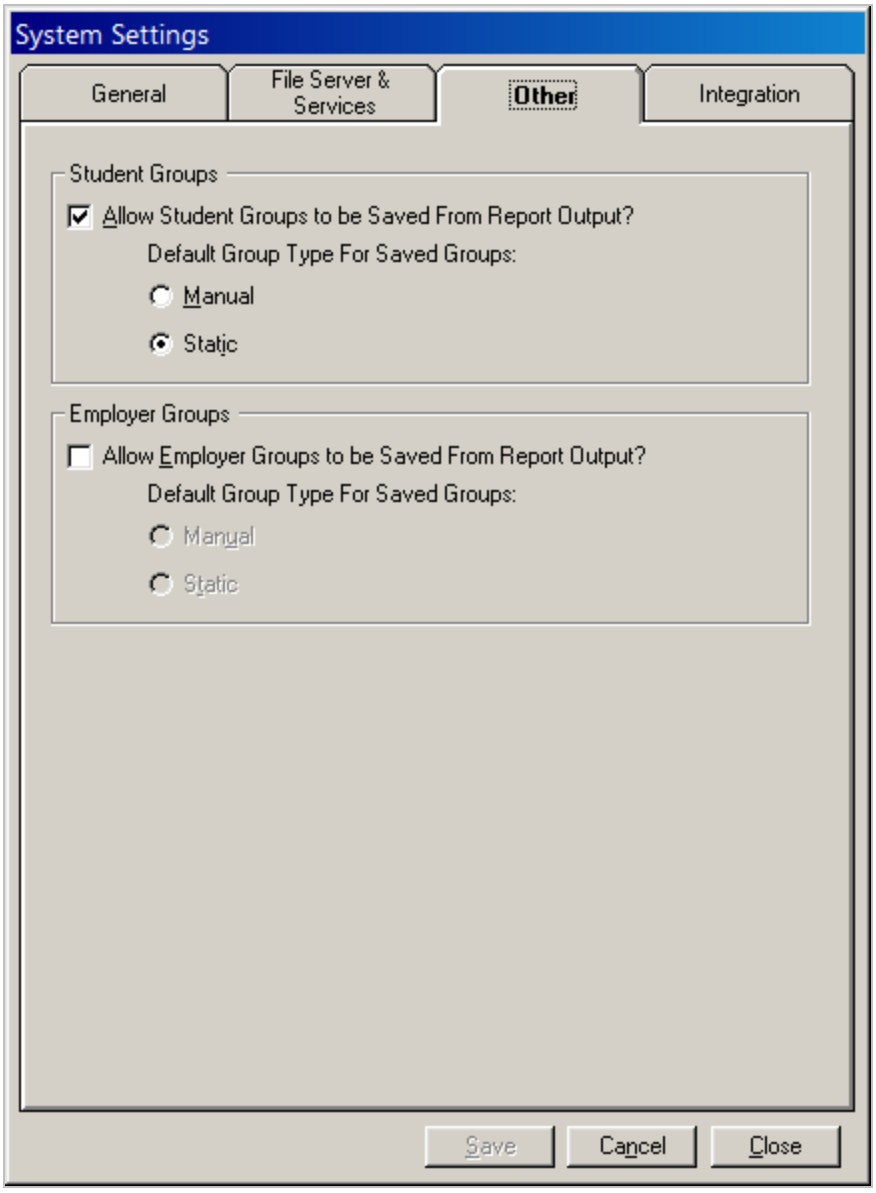
5. Click **Close** to close the form.
6. Click **Save** on the Set CampusLink Middle-Tier Web Service Locations form.
7. When prompted, verify your **login** to complete the save operation.

System Settings - Other Tab

Use the Other tab of the System Settings form to save student groups and employer groups from report output. You can also select a default (manual or static) group type for the saved groups.

To allow groups to be saved from reports:

1. Navigate to **Setup > System** and select the **Other** tab.



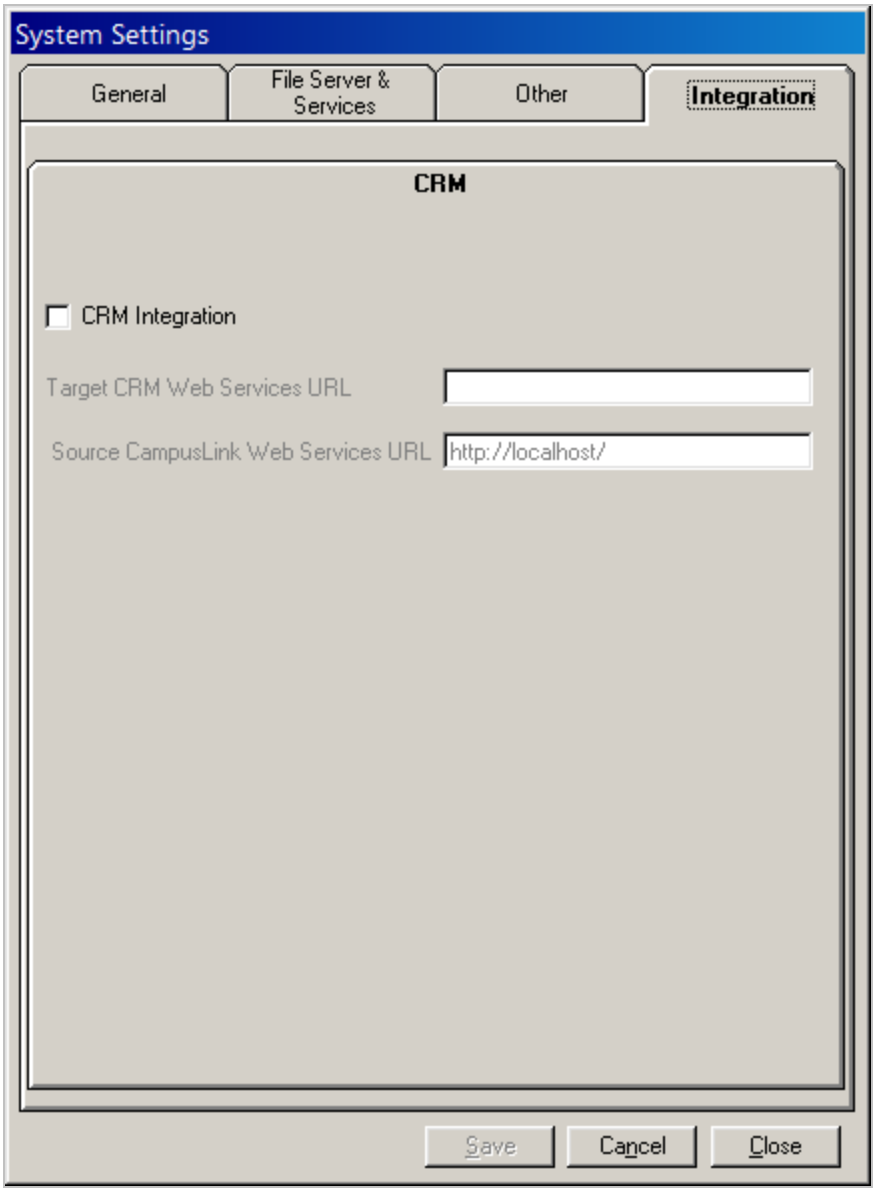
2. Select appropriate options for Student Groups and Employer Groups.
3. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

System Settings - Integration Tab

Use the System Settings Integration tab to configure CampusNexus Student to integrate with a Constituent Relationship Management (CRM) product.

To configure integration with a CRM product:

1. Navigate to **Setup > System** and select the **Integration** tab.



2. Select **Enable CRM Integration** to enable CampusNexus Student for integration with a CRM product. The default is disabled. The selected value is stored in the CampusNexus Student database SyRegistry table.

When CRM Integration is selected, the Target CRM Web Service URL and Source CampusLink Web Services URL fields become enabled. When CRM Integration is enabled at the system level, the outgoing queue is populated with Organizational level information such as list item elements and account elements.

3. Specify the **Target CRM Web Service URL** and **Source CampusLink Web Services URL** to provide the destination/source locations for outgoing transactions. The values in these fields are stored in the SyRegistry table.

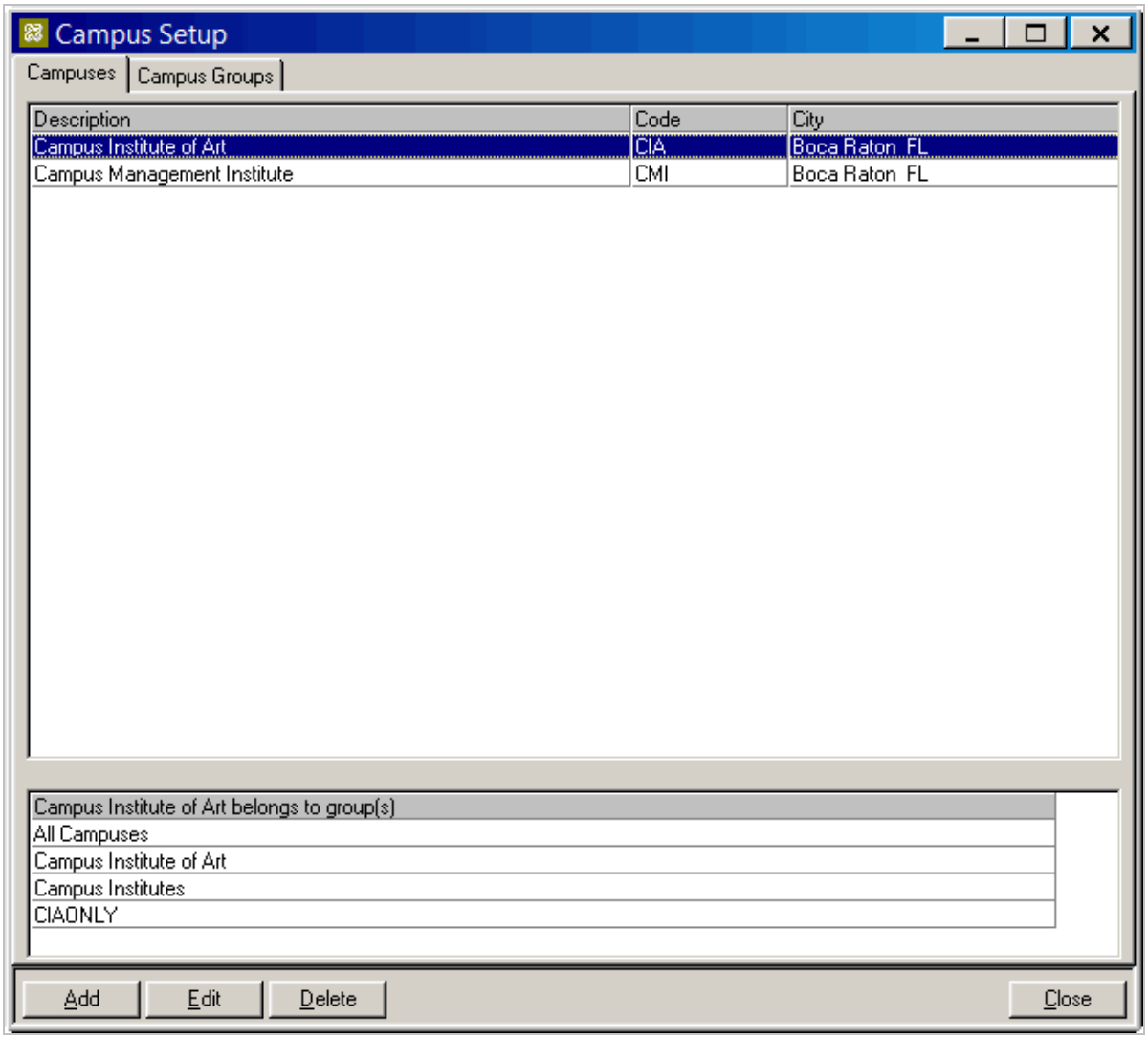
Note: If Enable CRM Integration is selected (Setup > Campus Locations > Add/Edit > Allow...) and you clear the CRM Integration check box (Setup > Settings > Integration), the following message is displayed: *CRM integration configured at the campus level will also be turned OFF. Do you want to continue?*

Campus Setup Form

CampusNexus Student requires that at least one campus is configured. The software comes with a default campus called Main which you can change when your system is installed. You can also add, edit, and delete campuses and campus groups.

To set up a campus or campus group:

1. As the system administrator, navigate to **Setup > Campus Locations**. The Campus Setup form is displayed.
2. On the Campuses tab, select a **campus**. You can set up each campus with the same or different configurations.



Note: When CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll (i.e., the selected GL/AP Package is "CampusNexus Finance"), campus information is passed from CampusNexus Student to CampusNexus Finance, HR & Payroll, for example:

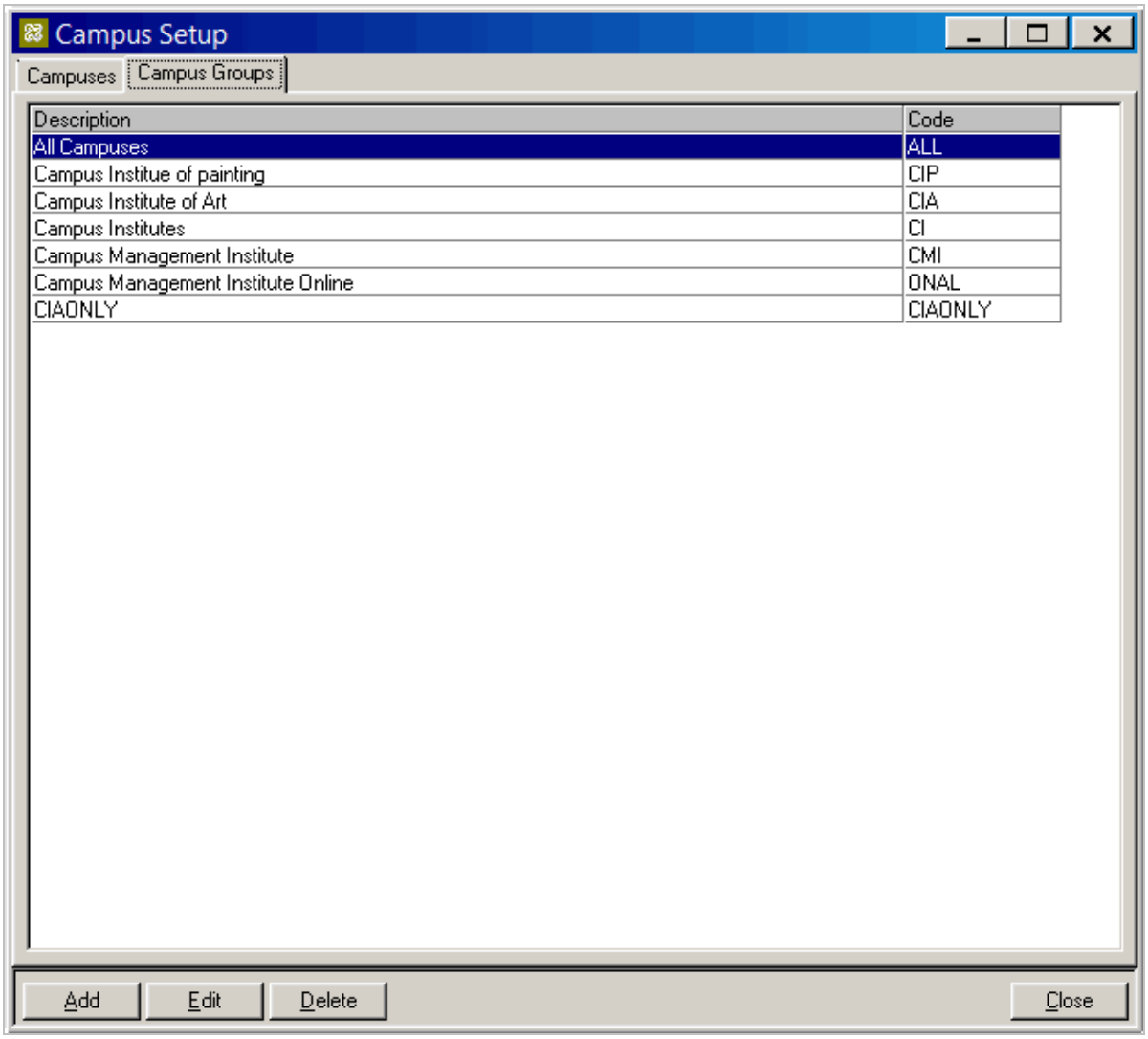
- If you create a campus with the proper GL Company Number, the Campus Code and Campus Description are passed to CampusNexus Finance, HR & Payroll and the same campus is created in CampusNexus

Finance, HR & Payroll.

- If you edit a Campus Description, the Campus Code and the changed Campus Description are passed to CampusNexus Finance, HR & Payroll, and the Campus Description is changed in CampusNexus Finance, HR & Payroll.
- If you delete a campus from CampusNexus Student, the same campus is deleted from CampusNexus Finance, HR & Payroll.

3. Click **Add** or **Edit**. The Campus Information form is displayed. Each tab contains options that can be configured for each campus. Specify appropriate data on each tab. For more information, see Campus Information form.
4. Click **Delete** to remove a campus. A confirmation message is displayed. Click **Yes**.

   Note: CampusNexus Student does not allow you to delete a campus that has been set up with data, such as staff member assignments, students enrolled, programs and courses set up, etc.
5. Click the **Campus Groups** tab to set up campus groups. For more information, see Add or Edit a Campus Group or Delete a Campus Group.



Note: When you edit a campus, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.

Campus Information Form

The Campus Information form is displayed when you navigate to Setup > Campus Locations, select a campus, and click Add or Edit. The Campus Information form contains the following tabs:

- Address
- Contact Info
- Accounting
- Financial Aid
- Options
- Allow...
- Academic Records
- Electronic Processing
- Transfer Options
- International
- Refunds & Stipends
- Career Services
- Housing
- Student Services

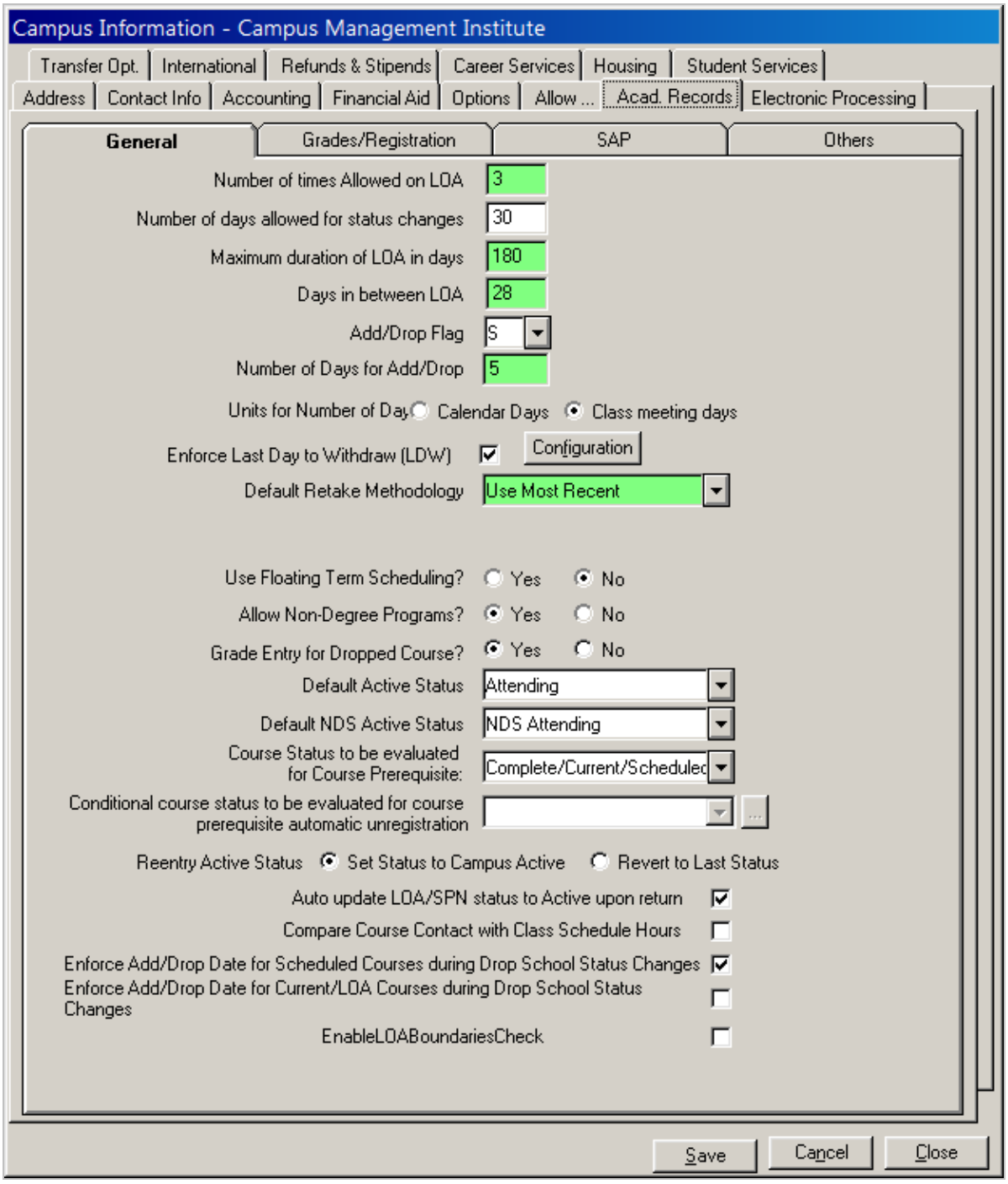
Each tab contains options that can be configured for each campus. Specify appropriate data on each tab. For more information, see the Help topics for each tab.

Campus Information - Academic Records Tab

Use the Acad. Records tab on the Campus Information form to set up basic information about your school's policies for certain student-related situations, e.g., leave of absences, course cancellation, and course retakes.

To add or edit academic records options for a campus:

1. Navigate to **Setup** > **Campus Locations** > select a campus > **Add/Edit** (button) > **Acad. Records** (tab).



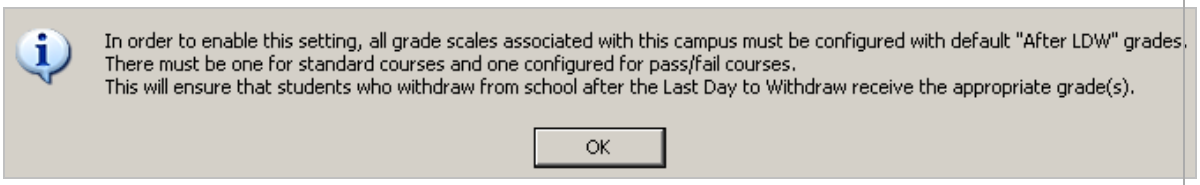
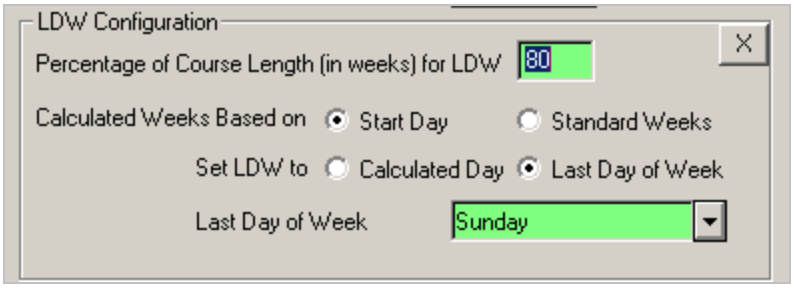
2. Specify appropriate options. For more information, see the fields descriptions for the General, Grades/Registration, SAP, and Others sub tabs.
3. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

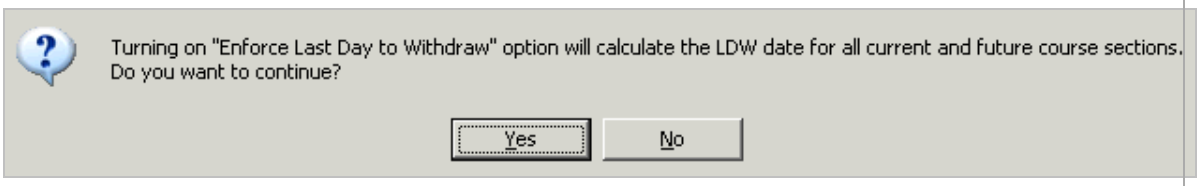
Note: When you edit a campus, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.

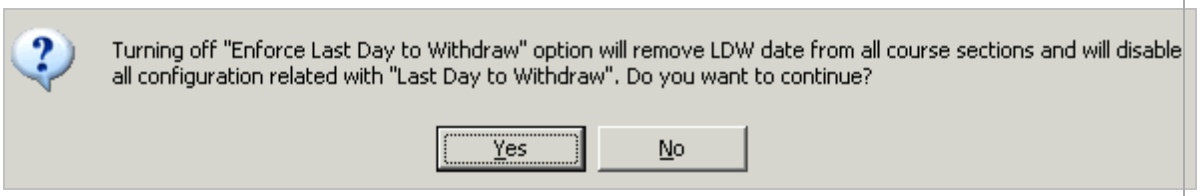
Field Descriptions: General Tab

Field	Description
Number of times Allowed on LOA	Enter the maximum number of times a student can take a Leave of Absence (LOA) from the school in each enrollment. 0 = unlimited.
Number of days allowed for status changes	Enter the number of days allowed to go back when setting the effective date for any status change.
Maximum duration of LOA in days	Enter the maximum number of days allowed for each Leave Of Absence. 0 = unlimited.
Days in between LOA	Enter the minimum number of days between Leaves of Absences. 0 = unlimited.
Add/Drop Flag	Select one of the following options: • Not Enforced (N) - default, campus does not enforce an add/drop date. • Campus Enforced (C) - enables an entry box where the user indicates the number of days after start date for the drop/add date for all terms for the campus location. • Term Enforced (T) - the add/drop date for the campus (specified during Term Setup) is enforced on a Term basis (each term defines a date). • Course Section Enforced (S) - the add/drop date for the campus is enforced based on the course section level.
Number of Days After Term Start Date for Add/Drop	This field becomes visible when 'C - Campus Enforced' is selected in the 'Add/Drop Flag' field. The 'Number of Days After Term Start Date for Add/Drop' value is the number of calendar days, starting with the day after the term start date, that are allowed for add/drop.
Number of Days for Add/Drop	This field becomes visible when 'S - Course Section Enforced' is selected in the 'Add/Drop Flag' field. The 'Number of Days for Add/Drop' value is the number of calendar days or class meeting days (depending on the Units for Add/Drop), starting with the course section's start date, that are allowed for add/drop.

Field	Description
Units for Number of Days are?	This field becomes visible when you select 'S (Course Section Enforced)' in the 'Add/Drop Flag' field. When a value is entered in the 'Number of Days for Add Drop' field, you must specify if the number of days are Calendar Days or Class meeting days.

Field	Description
Enforce Last Day to Withdraw	Select this check box to enforce last day to withdraw dates. When this feature is enabled, a last day to withdraw date is calculated for each course section offered at this campus. This does not mean "last day to withdraw and receive a non-punitive drop grade." This last day to withdraw date, once it has passed, will restrict staff users (who do not have override permission) and students from withdrawing from a course (moving a course from scheduled or current status to dropped). By default, this option is not selected. Before this feature can be turned on, you must ensure all Grade Scales associated with the campus have at least one general grade configured as a default 'After LDW Grade' and one Pass/Fail grade with a default 'After LDW Grade'. These grade settings are required to ensure that when school status changes to a dropped system status occur (if a course's LDW date is in the past), an appropriate non-drop grade will be posted to the course. If CampusNexus Student finds at least one grade scale without these two grades, the following message is displayed:  **Configuration (Enforce Last Day to Withdraw)** When Enforce Last Day to Withdraw is enabled, the LDW Configuration options are displayed. These options determine how CampusNexus Student calculates an LDW date for each course section.  • **Percentage of Course Length (in weeks) for LDW** allows you to enter the numeric percentage of course time allotted for withdrawals, i.e., the point at which course withdrawals are no longer allowed. For example, when you enter 80, an LDW date is calculated that falls after 80% of the course, in weeks, has passed. This value is then used to calculate the **Last Day of Withdrawal** for course sections during class scheduling. To calculate the percentage of course length in weeks for determining a LDW date, CampusNexus Student must first calculate the total number of weeks in the course. Institutions may have different methods of calculating course length in weeks depending on how they define the school week. The following additional configuration options enable you to define exactly how you prefer CampusNexus Student perform this calculation. Consider, as an example, a course section that starts on Wednesday, 4/1/09, and ends on Tuesday, 8/18/09, and you want to prohibit course withdrawals after 80% of the course has passed.

Field	Description
	• **Calculate Weeks Based on** allows you to configure how your institution defines weeks, and more specifically, how your institution wants CampusNexus Student to calculate the total number of weeks in the course. ◦ If **Start Day** is selected, the second week of the course starts on the 7th day after the course section's start date. Using the example course section noted above, if the course section's start date is Wednesday, 4/1/09, and **Start Day** is selected, then week 2 starts on Wednesday, 4/8/09. This also means that the last day of week 1 is Tuesday, 4/7/09. With this information, CampusNexus Student can then calculate the total course length as exactly 20 weeks. ◦ If **Standard Weeks** is selected, the next week starts the day after the selected **Last Day of Week**. So in this case, if the course section's start date is Wednesday, 4/1/09, and **Last Day of Week** is selected as Sunday, then week 1 ends on Sunday, 4/5/09 and week 2 starts on Monday, 4/6/09. With this information, CampusNexus Student can then calculate the total course length as 20 weeks and 2 days, which is rounded to 21 weeks. • **Set LDW to** allows you to select how CampusNexus Student sets the LDW date. ◦ If **Calculated Day** is selected, CampusNexus Student sets the course section's LDW date to the exact date calculated based on the Percentage of Course Length and Calculate Weeks Based on settings. Again, using the example course, this would translate to an LDW date of Tuesday, 7/21/09 (80% of the weeks based on start day = 16 weeks which equates to an exact LDW date based on the end of the 15th week), or Saturday, 7/25/09 (80% of the standard weeks = 16.8 weeks which equates to an exact LDW date on the 6th day after the 16th week). ◦ If **Last Day of Week** is selected, CampusNexus Student sets the course section's LDW date to the last day of the week (selected by the user in the next configuration option) following the exact calculated LDW date. So if the exact calculated LDW date is Tuesday, 7/21/09, and the Set LDW to setting is Last Day of Week and the Last Day of the Week setting is Sunday, then the LDW date set on the course section will be Sunday, 7/26/09. Or, if the exact calculated LDW date is Saturday, 7/25/09, and the Last Day of the Week setting is Sunday, then the LDW date set on the course section will also be Sunday, 7/26/09. • **Select Last Day of Week** allows you to select a day that is used as the last day of week when calculating LDW date. This field is required if Calculate Weeks Based on is configured to Standard Weeks, or Set LDW to is configured to Last Day of the Week. When this option is enabled, the default selection is Saturday. When you select the Enforce Last Day to Withdraw option, the following message is displayed:  • If you click No, the record is not saved and the Last Day to Withdraw feature remains off.

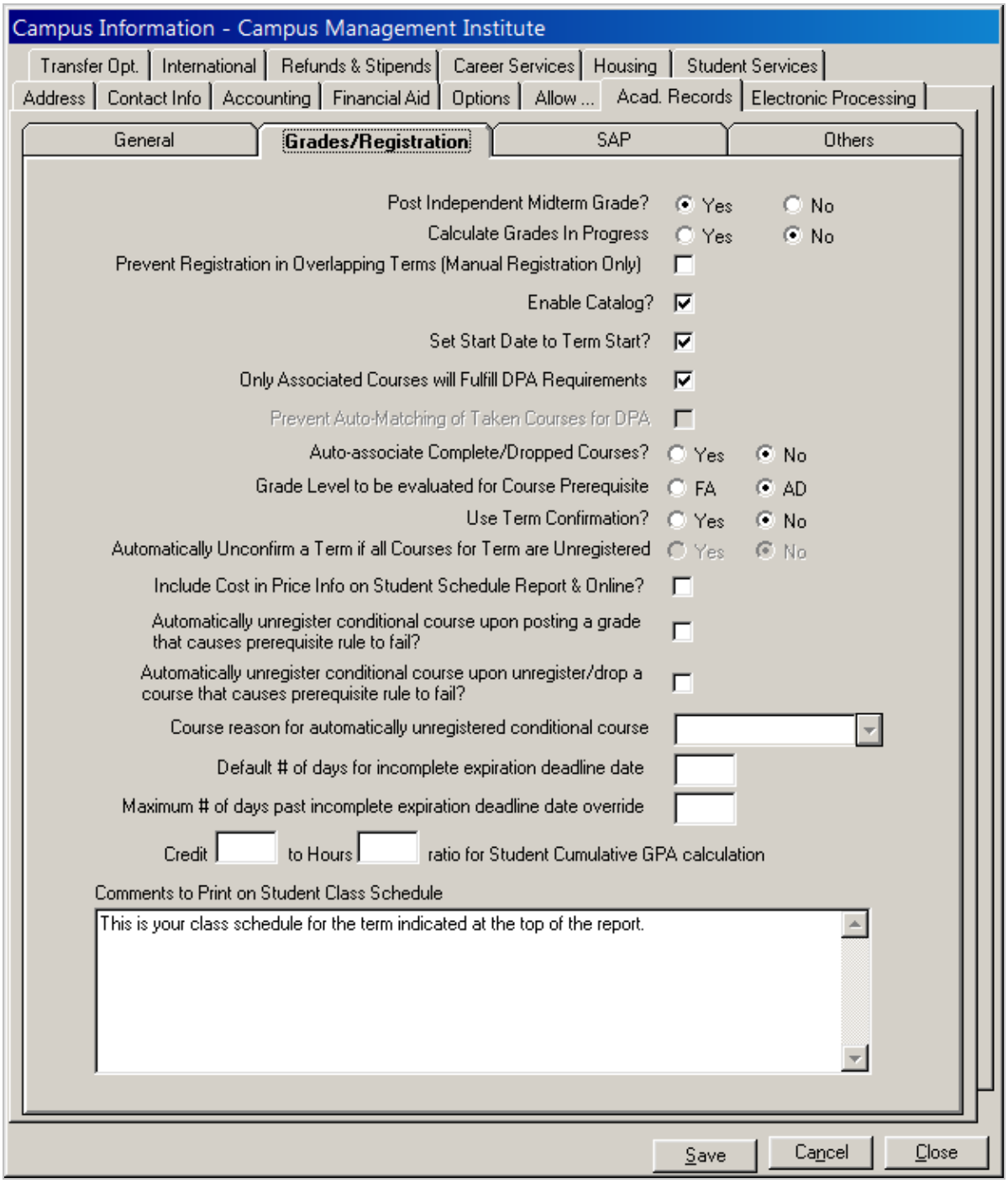
Field	Description
	• If you click Yes, an LDW date for all current and future course sections is calculated based on the LDW configuration settings and each course section's start and end dates. When you clear the Enforce Last Day to Withdraw option, the following message is displayed:  • If you click No, the record is not saved and the Last Day to Withdraw feature remains on. • If you click Yes, LDW dates for all course sections are deleted along with the LDW-related configurations for Attendance Rules and Auto Drops.
Default Retake Methodology	For courses that have been retaken, select the method by which CampusNexus Student is to count the grades in the GPA. The options are: • Average the grades for all retakes • Include all the grades • Use the highest of the grades for the course • Use the most recent of the grades for the course
Use Floating Term Scheduling?	Select Yes if your school offers uses floating term scheduling. The default is No. The value specified in this field is stored in SyCampus.FloatingTerm. • If the campus elects to use floating term scheduling, it can attach a single class to multiple terms. • If the campus is not using floating term scheduling, a scheduled class is attached to only one term.
Allow Non-Degree Programs?	Select Yes if your institution offers courses or programs for non-degree-seeking students. The default is No when you add a campus. See also Tracking NDS students.
Grade Entry for Dropped Course?	Select Yes if your school requires that a final grade be designated before allowing a student to drop a course. The default is No when you add a campus. **Note**: For batch status changes (Daily > Academic Records > Batch Status Change), when dropping multiple students, the default grade as set on the Grade Scale is applied. If no default grade is enabled, no grade is applied for dropped students in the batch.
Default Active Status	Select the default active status for degree-seeking students. This is the status to which students are changed when their first attendance is posted in a degree program. See Tracking NDS students.

Field	Description
Default NDS Active Status	Select the default active status for NDS students. This is the status to which students are changed when their first attendance is posted in a non-degree course or program. **Note**: Before you can select the Default NDS Active Status, you must set up your NDS School Status codes. See Tracking NDS students.
Course Status to be evaluated for Course Pre-requisite	Use this field to register a student for any class regardless of the status that the prerequisite may have; however, CampusNexus Student forces you to acknowledge a "Prerequisites Not Met" dialog box before completing the registration if the prerequisite does not have a complete status. To avoid using the prerequisite override property, you can define, at the campus level, which pre-requisite statuses (complete, current, or scheduled) do not require the override property. The choices are: • Complete – if the prerequisite status is complete, an override is not required. • Complete/Current – if the prerequisite status is complete or current, an override is not required. • Complete/Current/Scheduled – if the prerequisite status is complete, current or scheduled, an override is not required.
Conditional course status to be evaluated for course pre-requisite automatic unre-gistration	Use this field to configure any combination of the following conditional course statuses to be evaluated to allow automatic unregistration: Scheduled and/or Current. **Note**: This field is required if you selected one of the following options on the Grades/Registration tab: • Automatically unregister conditional course upon posting a grade that causes prerequisite rule to fail • Automatically unregister conditional course upon unregister/drop a course that causes pre-requisite rule to fail
Reentry Act-ive Status	Select an active school status for students upon reentry after attendance is first taken by choosing 'Set Status to Campus Active', or select 'Revert to Last Status'.
Auto update LOA/SPN status to Act-ive upon return	Use this option to automatically update a student's school status from a Leave of Absence (LOA) or a Standard Period Non-Enrollment (SPN) to the student's last "active" status when attendance is pos-ted. **Note**: This update will not occur unless the student's LOA period has ended. If the student is returning from an LOA period early, LOA dates must be manually adjusted to ensure that attendance is available for posting on the Daily and View menus.
Compare Course Contact with Class Sched-ule Hours	Use this option to compare class hours scheduled to the contact hours configured at the course level.

Field	Description
Enforce Add/Drop Date for Scheduled Courses during Drop Status Changes	Use this option to restrict the unregistration of Scheduled status course if the add/drop date of the course sections has passed. This setting only applies when processing a school status change to any new school status that belongs to a system status of Drop. **Note**: When determining if the school status change occurs before or after a scheduled status course's add/drop date, CampusNexus Student uses the NSLDS Withdrawal Date.
Enforce Add/Drop Date for Current/LOA Courses during Drop Status Changes	Use this option to restrict the unregistration of Current/LOA status course if the add/drop date of the course sections has passed. This setting only applies when processing a school status change to any new school status that belongs to a system status of Drop.

Field	Description
Only change status of courses within LOA period	When this feature is enabled, CampusNexus Student automatically changes courses in Current and Scheduled status only when the course dates fall within the LOA period to LOA status. It additionally updates each course's status to the appropriate status when a student returns to an Active status category after a Leave of Absence (LOA) period ends. The automatic status change applies only to registered courses in Current and Scheduled statuses. When this feature is disabled, all current and scheduled courses change to an LOA status when a student takes a leave of absence. Each of those courses then needs to be reinstated through the interface individually when the student returns from the LOA. Enabling this feature removes the burden on administrators and registrars to manually reinstate courses on the student's schedule when the student returns from an LOA. CampusNexus Student applies the following rules to the automatic status change: • If the course was in Scheduled status before the LOA and the student returns before the course end date, the course status is changed from LOA to Scheduled. • If the course was in Current status before the LOA and the student returns before the course end date, the course status is changed from LOA to Current. • If the course end date is prior to the LOA end date, the course remains in LOA status. • If any days within the start and end dates of Current and Scheduled course fall within the LOA date range, the course status is changed to LOA. • If a student posts attendance in a course that is in LOA status, the course status is changed from LOA to Current. The automatic status change also applies when the LOA return date is extended or shortened on the Status Change form: • When the LOA return date is extended, if a course start date did not fall within the original LOA date range but now does, that course status is automatically changed to LOA. • When the LOA return date is shortened, if a course start date did originally fall within the LOA date range but now does not, that course status is automatically changed to its original status. CampusNexus Student also updates course statuses that go from a particular LOA status to another LOA status. For an LOA that begins in the future, perform the following procedure: 1. Specify the student's LOA begin date on the Status Change form and click Save. 2. On the LOA begin date, manually execute the stored procedure (SP) `c2ksp_AdStatusChange_CheckFuture`. After running this SP, student status changes to LOA and all Current courses change to LOA. **Notes**: • If course status change requires course instances to be added, manually update the courses that fall within that scenario. CampusNexus Student does not automatically add future instances of courses.

Field	Description
	• For a course that cannot be completed because the end date of the course falls within the LOA period, the course status does not revert back to its original status. In this case the administrator/registrar needs to add a future course instance manually. This ensures that courses that cannot be completed are not used in SPE calculations. • For courses that remain in LOA status after the automatic status changes, institutions need to apply their own policies with regard to charges for those courses. Any status changes from Active to LOA are captured chronologically in the CampusNexus Student audit.



Field Descriptions: Grades/Registration Tab

Field	Description
Post Independent Midterm Grade?	Select Yes if your institution wants to post midterm grades that are independent of final grades. The default is No when you add a campus.
Calculate Grades in Progress	Select Yes to allow current grades to be viewed and calculated. This functionality is enabled in Gradebook, Student Lesson Schedules and Reports. The default is No.

Field	Description
Prevent Registration in Overlapping Terms (Manual Registration Only)	Select this option to prevent registration for overlapping terms. This applies to manual registration only.
Enable Catalog	Select this option to tie courses to a catalog. See also Programs, Program Versions, Areas of Study, Applicant, Enroll Student and Batch Catalog Assignment tool. **To disable/enable a catalog**: **Note**: The following messages may be displayed when you try to disable a catalog and you cannot disable it: a. When a student is enrolled in a program version with both Campus A and Campus B checked, and the catalog is enabled in both campuses in Campus A and the student is enrolled in the program version with both Campus A and Campus B checked with the catalog enabled in both campuses in campus B, then navigate to Setup > Campus Locations > Edit Campus B - OR - navigate to Campus A > Academic Records > Grades and Registration and disable the catalog. The following message is displayed: *This campus has students enrolled using one or more catalogs. The catalog function cannot be turned off.* b. Remove the catalog associated with Campus B from the Enrollment form, navigate to Setup > Campus Locations > Edit Campus B > Academic Records > Grades and Registration, and disable the catalog. The following message is displayed: '*This campus has program versions using one or more catalogs. The catalog function cannot be turned off.*' Navigate to Setup > Campus Locations > Edit Campus A > Academic Records > Grades and Registration and disable the catalog. The following message is displayed: *This campus has students enrolled using one or more catalogs. The catalog function cannot be turned off.*

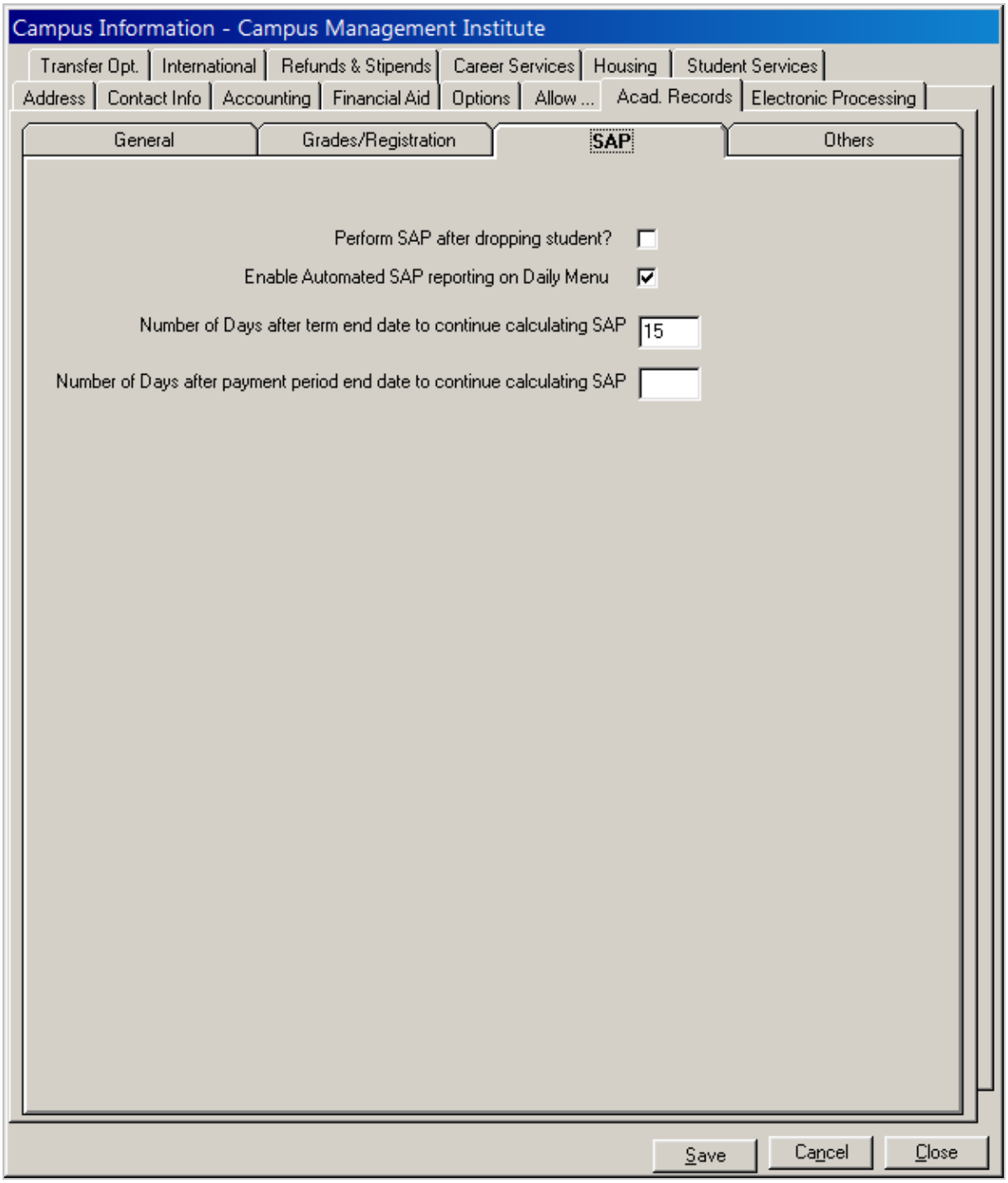
Field	Description
Set Start Date to Term Start?	Select this option to set the start date for the enrollment to the Term Start date for the first class the student attends. This option compares the version start date to the term start date to ensure that start dates are accurate and meaningful in term-based schools. The value is stored in SyCampus.SetTermStart. *Example* If Term 0501 starts on 01/03/2008, and a new student registers for a Term 0501 class which meets on WED and FRI, when attendance is recorded for the class on Wednesday, 01/05/2008: • If this check box is selected, the Enrollment Start date is set to 01/03/2008. • If this check box is cleared, the Enrollment Start date is set to 01/05/2008. If this option is not selected, the version start date is same as the day as when positive attendance gets posted. **Note**: For Reentry with Active Units of "Attendance Recorded" configuration of program version, upon status change to active, a record must be inserted into enrollment status history and the begin date must be populated with the date when positive attendance gets posted and sum of positive attendance is equal to or more than the active unit configuration. The date of the positive attendance has to be on or after the reentry date. If it's before the reentry date, the status will not be set to active. Version Start Date are updated only if enrollment record does not have it. If it's there, it won't be updated. When version start date gets updated, "Set Start date to term Start" configuration is taken into consideration.
Only Associated Courses will Fulfill DPA Requirements	Select this check box to configure CampusNexus Student to ONLY auto-match courses that are associated (**associated course**[1]). The check box is cleared by default. Selecting this check box automatically disables the option Prevent Auto-Matching of Taken Courses for DPA. A user can see courses fulfilled on the actual DPA only if the courses were associated when CampusNexus Student was configured to do so. In the case of multiple enrollments across different campuses, the student's enrollment campus configuration is taken into consideration.

[1]A course with a status of Completed or Dropped that is linked to an enrollment other than, and in addition to, the student's original enrollment.

Field	Description
Prevent Auto-Matching of Taken Courses for DPA	Select this check box to prevent **auto-matching**[1] of **taken course**[2]s in other enrollment(s). The check box is cleared by default. If the check box is selected, the Only Associated Courses will Fulfill DPA Requirements option is disabled. When configured to prevent auto-matching of taken courses, CampusNexus Student does not auto-match required courses on the actual DPA form. In the case of multiple enrollments across different campuses, the student's enrollment campus configuration is taken into consideration.
Auto-associate Completed/Dropped Course?	Select Yes to Auto-Associate Complete/Dropped courses to other enrollments that share the same course requirements. If this is set to Yes, courses are auto-associated when grades are posted and when Enrollment and/or Area of Study changes are made. The default is No.
Grade level to be evaluated for Course Prerequisite	Select FA (Financial Aid) or AD (Academic Records) to associate grade levels to be evaluated for course prerequisites.
Term Confirmation	Set the Use Term Confirmation and Automatically Unconfirm a Term if all Courses for Term are Unregistered options as defined in Term Confirmation.
Automatically unregister conditional course upon posting a grade that causes prerequisite rule to fail?	Select this check box if a conditional course is automatically unregistered when a grade is posted that causes the prerequisite rule to fail. The default is No.
Automatically Unconfirm a Term if all Courses for Term are Unregistered	Select Yes if CampusNexus Student automatically unconfirms a term when all courses for that term are unregistered. The default is No.
Include Cost in Price Info on Student Schedule Report & Online	Select this check box to include the cost with the available price information on the Student Schedule Report and online.
Automatically unregister conditional course upon unregister/drop a course that causes prerequisite rule to fail?	Select this check box if a conditional course is automatically unregistered when an action occurs that causes the prerequisite rule to fail (e.g., dropped/unregistered course). By default this field is cleared.
Course reason for automatically unregistered conditional course	Use this field to configure the course reason that will be applied upon automatic unregistration if either of the automatic unregistration options above is set to Yes. By default this field remains blank.

[1]Degree Progress Audit logic that automatically matches course requirements from one enrollment with taken courses of other enrollments.
[2]A course with a status of Scheduled, Current, Completed, or Dropped.

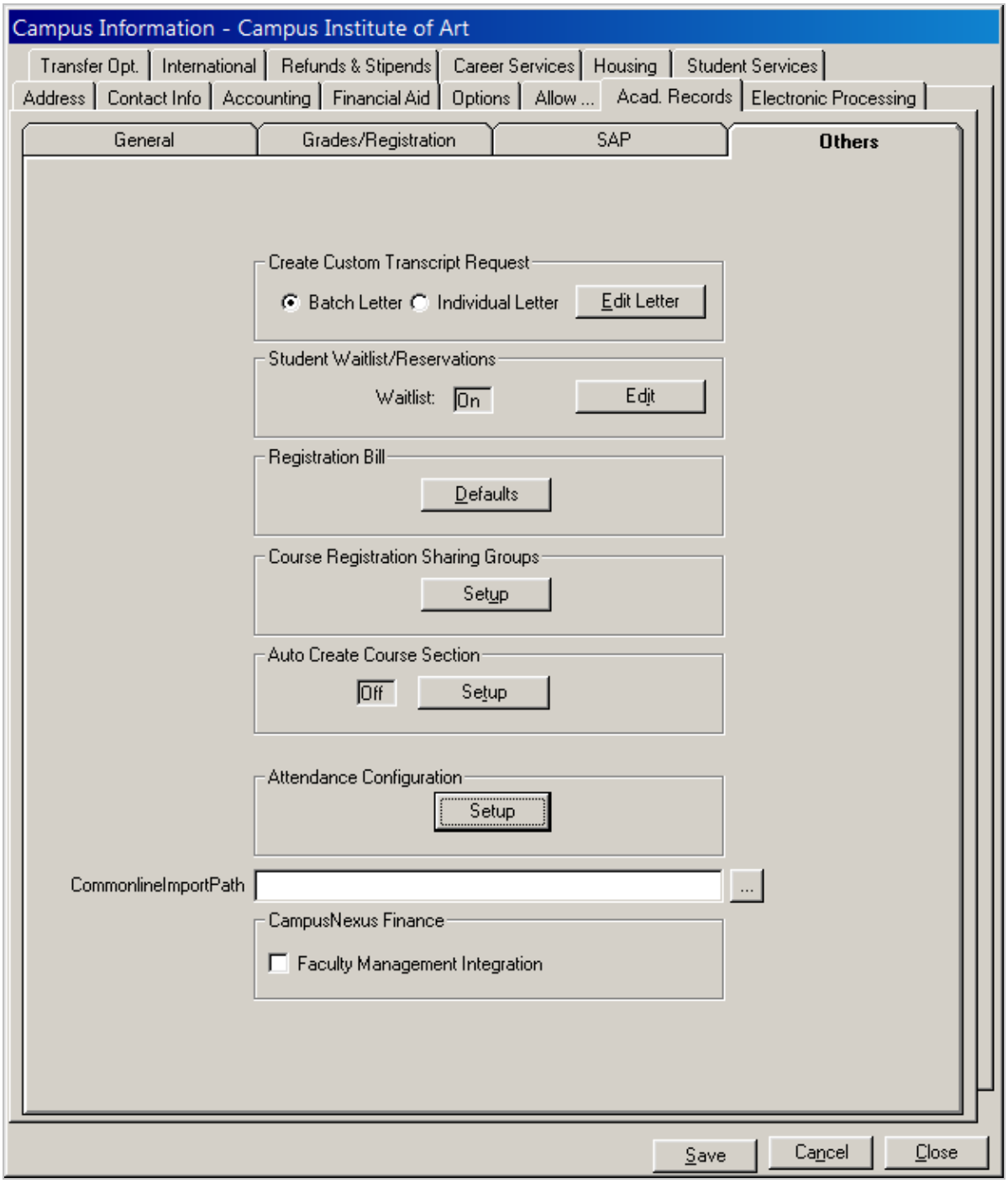
Field	Description
Default # of days for expiration deadline date	Enter the number of days your institution allows students who receive an Incomplete to finish the coursework required to complete a course after the course's end date.
Max # of days past expiration deadline date override	Provide the number of days past the expiration deadline date that you allow your instructors or staff to override the default date (provided above).
Credit to Hours ratio for Student Cumulative GPA calculation	Populate the Credit field with the number of credits that correspond to the number of Hours in a Clock Hours program version to ensure that the Cumulative GPA is calculated correctly for students enrolled in a Credit Hour program version and a Clock Hour program version. It is configurable on a campus by campus basis for situations where outside agencies dictate different credit to hour ratios.
Comments to Print on Student Class Schedule	Enter any comments to be included on all student schedules printed for the selected campus. The default is No when you add a new campus.



Field Descriptions: SAP Tab

Field	Description
Perform SAP after dropping student?	Select Yes to calculate SAP for any student who has dropped. The default is No (to skip SAP calculation).

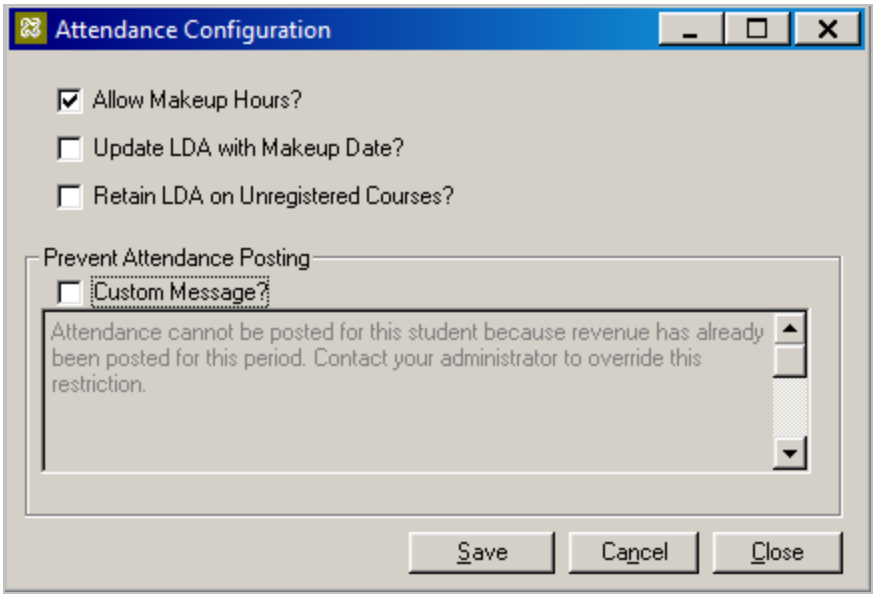
Field	Description
Enable Automated SAP reporting on Daily Menu	Select this option when the campus uses Automated SAP Reporting and wants to allow viewing of the results of Automated SAP Processing. When this check box is selected, the menu item Review Automated SAP Results is displayed when the Daily > Academic Records menu is selected.
Number of Days after term end date to continue calculating SAP	When a campus uses Automated SAP Processing or wants to limit the time period during which manual calculations can be performed, enter the number of days after a term end date during which Automated SAP processing should occur. Once this value has been exceeded, automatic or manual SAP processing no longer occurs, unless you have the authority to override this setting. If the field is blank, manual processing may be done at any time but no Automatic SAP processing occurs.
Number of Days after payment period end date to continue calculating SAP	When a campus uses Automated SAP Processing or wants to limit the time period during which manual calculations can be performed, enter the number of days after a payment period end date during which Automated SAP processing should occur. Once this value has been exceeded, automatic or manual SAP processing no longer occurs, unless you have the authority to override this setting. If the field blank, manual processing may be done at any time but no Automatic SAP processing occurs.



Field Descriptions: Other Tab

Field	Description
Create Custom Transcript Request	Select Batch Letter or Individual Letter and - if needed - click **Edit** to modify the letter.

Field	Description
Student/Waitlist Reservations	Click **Edit** to enable the wait list option and/or modify the wait list default settings. This feature may be used in conjunction with the Auto Create Course Section feature. • When the Student/Waitlist Reservations flag is disabled (Off), reservations for classes are not permitted. • When the Student/Waitlist Reservations flag is enabled (On), reservations for classes are permitted. For more information, see Student Waitlist Defaults.
Registration Bill	Click **Defaults** to configure registration bill defaults. For more information, see Registration Bill Defaults.
Course Registration Sharing Groups	Click **Setup** to configure course registration sharing groups. For more information, see Course Registration Sharing Groups.
Auto Create Course Section	When registering a student, if the student is registered in a course where the threshold for 'Remaining Seats in a Current Section' or 'Remaining Seats on a Waiting List' is met by adding the student, CampusNexus Student automatically creates a new Class Schedule (section), and informs you hat a new section was added if the Auto Create Course Section flag is set to 'On'. CampusNexus Student changes the flag from 'Off' to 'On' if the 'Allow Auto Add Course Section?' flag is activated and Auto Add Course Section Setup configurations have been entered (click **Setup** to activate this feature) and saved. These settings are used inPortal for online courses only.

Field	Description
Attendance Configuration	Click **Setup** to access the Attendance Configuration form.  **Field Descriptions: Attendance Configuration** **Field** / **Description** Allow Makeup Hours? — Select this check box to allow makeup hours. Update LDA with Makeup Date? — Select this check box to update the last day of attendance (LDA) with the makeup date. **Note**: This option becomes available after Allow Makeup Hours? is selected. Retain LDA on Unregistered Courses? — Select this check box to keep the course LDA when unregistering a course, even though attendance is being removed. If this check box is cleared, the course LDA is lost and the LDA are reset to the last date the student was in attendance in courses other than the unregistered course. This setting is in effect for the entire campus unless overridden by a 'Retain LDA on Unregistered Courses' setting for a specific course reason code or term. Custom Message? — When you select this check box, the associated text box is enabled so that you can edit the default message and save the modified, custom message of up to 2000 characters. If the check box is not selected, the text box remains populated with the default message.
Batch Transcript Print Path	Click ... to select the appropriate path.

Field	Description
Faculty Management Integration	This campus-level option is available only if the global Faculty Management Integration flag is enabled on the Academic Records Settings - General Tab. If both the global and campus-level Faculty Management Integration flags are enabled, the synchronization of courses taught by an instructor and related details affects only campuses in which the campus-level flag is enabled.

Course Registration Sharing Groups

Course Registration Sharing Groups (CRSG) provide the means for a campus to share a course with another campus so that students have additional options for registering for course sections that may be filled or inconveniently scheduled at their regular campus.

The sponsoring campus (the campus that owns the course) settings for the course determine when students from other campuses can view shared course sections and when students can register into the shared course sections.

The Course Registration Sharing Groups feature is enabled or disabled system-wide under Setup > Academic Records > Student Registration. If 'Yes & Use CRSG (Course Registration Sharing Groups)' is enabled, CampusNexus Student users can share access to courses offered at other campuses.

Prerequisites:

a. Users must have access to the campuses involved (enabled under Setup > Staff > *staff member*> Staff Information > User Info tab).

b. Terms must be Active and enabled for the campuses involved (enabled under Lists > Academic Records > Term tab > Edit > Campuses field).

c. Courses must be Active and shared to the campuses involved (enabled under Lists > Academic Records > Courses tab > Edit > Campuses).

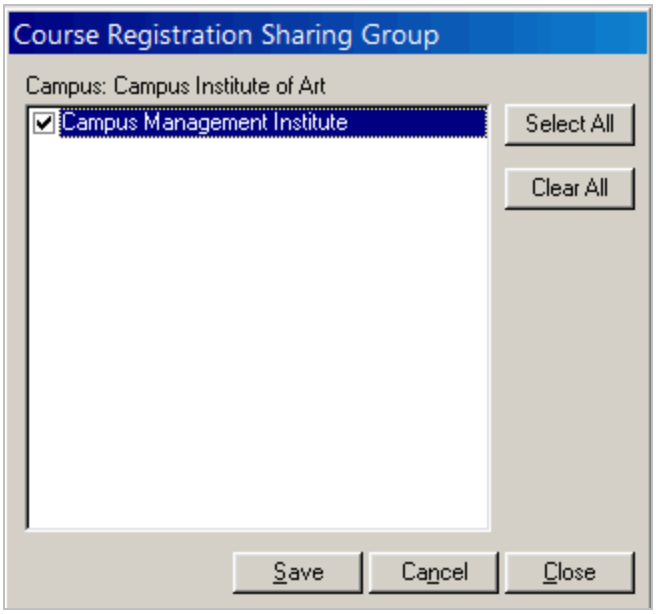
d. Course Sharing Start and End dates and times must have valid dates entered for all columns on the grid (Daily > Academic Records > Schedule Classes > select a class schedule > Publish Schedule).

e. Class schedules must be shared with the desired campuses (Daily > Academic Records > Schedule Classes > select a class schedule > Edit > Course Sharing list).

The campus list for Course Sharing is available only if all prerequisites are met. The campus list will include only those campuses that meet all the criteria involved.

To enable course registration sharing groups:

1. Navigate to **Setup** > **Campus Locations** > select a campus > **Add/Edit** (button) > **Acad. Records** (tab) > **Others** (tab).
2. On the Others tab under Course Registration Sharing Groups, click **Setup**. The Course Registration Sharing Group form is displayed.



3. Select the campuses that will be sharing courses.
4. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Note: When you edit a campus, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.

To enable users for CRSG:

1. Navigate to **Setup > Staff**, select a staff member from the list, and click **Edit**. The Staff Information form is displayed.
2. On the **User Info** tab set up the options that are required for this user. Each user must have permissions for the sponsoring campus and the sharing campus. The users must also have the appropriate permissions for the functions for their job tasks. See Staff Member-Add for further details.

When a user at a sponsoring campus is scheduling courses, the user can schedule courses from the sponsoring campus only, but can remove at the section level other campuses listed in the CRSG.

Registration Groups are not supported for courses being offered by other campuses. Students can register based on their home school registration group rules. Class sections offered by other campuses are available for registration only if the home campus has indicated "online registration start dates" for the term in which the class is scheduled.

Course Registration Sharing and Course Section Add/Drop Date Enforcement

Course registration can take place from multiple locations within CampusNexus Student and course sections can be shared between multiple campuses. Regardless of where course registration is initiated, during the registration process, the Add/Drop flag for the student (in relation to the course being registered) depends on the Academic Records system level setting for Add/Drop enforcement (Setup > Academic Records > Settings tab). Based on whether Add/Drop enforcement is configured as 'Student's enrollment campus' or 'Course section's campus', the appropriate campus is checked to determine what type of add/drop validation needs to take place, if any. If an add/drop policy is configured, CampusNexus Student calculates the add/drop date.

The logic to determine the add/drop date is as follows:

a. The Academic Records system level setting ('Campus for add/drop?') is used to determine which campus to use when determining the add/drop policy: the 'Student's enrollment campus' or the 'Course section's campus'.
b. The Add/Drop flag for the campus designated in the Academic Records system level setting is checked.

c. If the Academic Records system level setting is configured to use the 'Student's enrollment campus' and the 'Add/Drop Flag' of the student's enrollment campus is set to 'S - Course Section Enforced', CampusNexus Student enforces the add/drop policy of the course section's campus. If the 'Add/Drop Flag' for the student's enrollment campus is different than 'S - Course Section Enforced', the student's enrollment campus is used.

d. If the Academic Records system level setting is configured to use the 'Course section's campus', the same campus's policy is used.

e. When the appropriate campus and add/drop flag configurations have been determined, the add/drop date is calculated as follows:

Add/Drop Flag Configurations

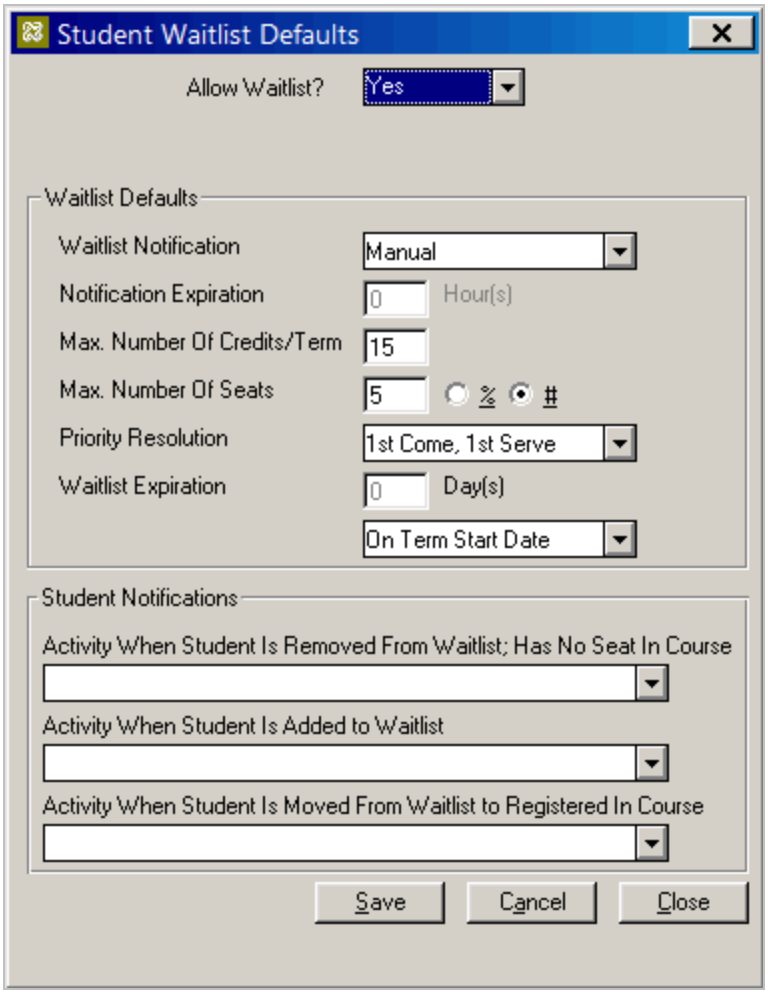
If the 'Add/Drop Flag' is...	...calculate the add/drop date as follows:
N - Not Enforced	...there is no add/drop date because one is not being enforced.
C - Campus Enforced	...the add/drop date is being enforced by campus (the campus that was determined above). Calculate the add/drop date by adding the number of days after the start date configured at the campus level to the course section's term start date.
T - Term Enforced	...the add/drop date is being enforced by term. Obtain the add/drop date configured at the term level for the course section's term.
S - Course Section Enforced	...the add/drop date is being enforced by course section. Obtain the add/drop date configured at the course section level for the appropriate course section.

Student Waitlist Defaults

You can configure the waitlist defaults for course reservations. See also Class Schedule.

To configure waitlist defaults:

1. Navigate to **Setup** > **Campus Locations** > select a campus > **Add/Edit** (button) > **Acad. Records** (tab) > **Others** (tab).
2. On the Others tab under Student/Waitlist Reservations, click **Edit**. The Student Waitlist Defaults form is displayed.



3. Specify appropriate options. For more information, see Field Descriptions.
4. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Note: When you edit a campus, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.

Field Descriptions

Field	Description
Allow Waitlist?	Select Yes to allow a waitlist/reservations for selected classes, otherwise select No.

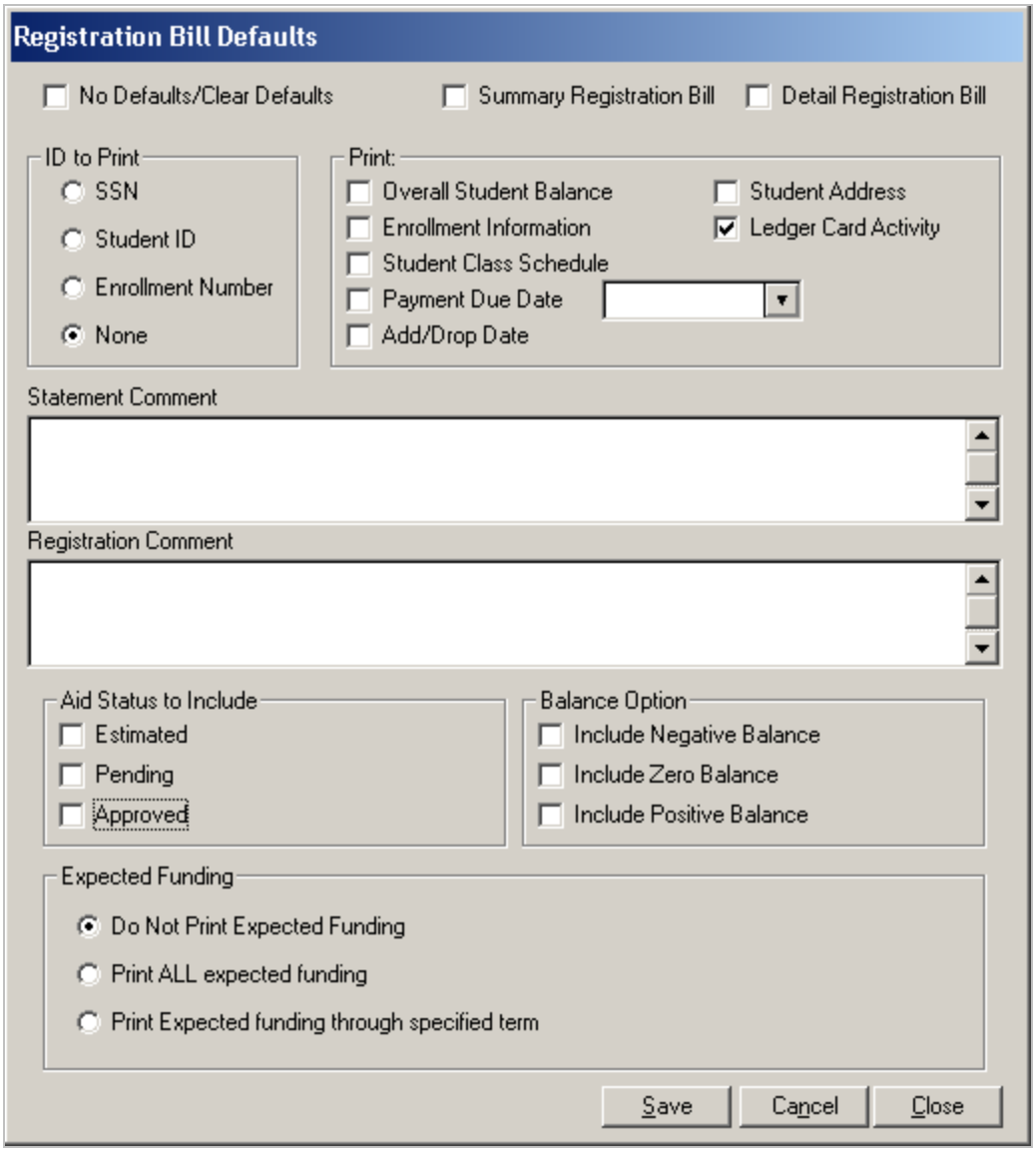
Field	Description
Waitlist Notification	Select Automatic or Manual.
Notification Expiration	Specify the number of hours for the waitlist notification to expire.
Max. Number Of Credits/Term	Specify the class maximum number of credits/terms that must be fulfilled before being considered for a waitlist. This number is derived by taking the maximum number of seats multiplied by the maximum number of credits for a class. For example, if you offer 3 credit classes, you would take 5 (maximum number of seats) and multiply by 3 credits to get 15 maximum number of credits/terms.
Max. Number Of Seats	Specify the maximum number of seats assigned to the waitlist. If you want the number entered to be a percentage, select the percentage (%) option, otherwise select (#).
Priority Resolution	Select one of the following options: • 1st Come, 1st Serve • Cumulative Credits • GPA
Waitlist Expiration	Specify the number of days for the waitlist to expire and select one of the following options to indicate what the expiration date is based on: • On Term Start Date • After Term Start Date • Before Term Start Date • On Add/Drop Date for Term • After Add/Drop Date for Term • Before Add/Drop Date for Term
Activity When Student is Removed From Waitlist; Has No Seat in Course	Select one of the following activities to indicate when the student is removed from the waitlist: • FA Verification Dependent • Send waitlist email to student
Activity When Student is Added to Waitlist	Select one of the following activities to indicate when the student is added to the waitlist: • FA Verification Dependent • Send waitlist email to student
Activity When Student Is Moved From Waitlist to Registered in Course	Select one of the following activities to indicate when the student is moved from the waitlist to a registered course: • FA Verification Dependent • Send waitlist email to student

Registration Bill Defaults

The Print Registration Bill buttons on the student schedule and ledger card are not enabled unless defaults for the report have been defined for the campus. The defaults that you define here are also used in the Registration Wizard, but can be changed when running the report.

To configure registration bill defaults:

1. Navigate to **Setup** > **Campus Locations** > select a campus > **Add/Edit** (button) > **Acad. Records** (tab) > **Others** (tab).
2. On the Others tab under Registration Bill, click **Defaults**. The Registration Bill Defaults form is displayed.



3. Specify appropriate options. For more information, see Field Descriptions.
4. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Note: When you edit a campus, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.

Field Descriptions

Field Label	Description
No Defaults/Clear Defaults	Select this check box if no defaults are to be specified or to clear the current default values.
Summary Registration Bill Detail Registration Bill	Select Summary Registration Bill to generate the standard (summary) student registration bill report. Select Detail Registration Bill to generate a detailed student registration bill report. You may select Summary, Detail, or both; you **must** select at least one option.
ID to Print	Select one of the following that you want printed on the form: • SSN (Social Security Number) • Student ID • Enrollment Number • None
Print	Select the information to be printed: • Overall Student Balance • Enrollment Information • Student Class Schedule • Payment Due Date • Add/Drop Date • Student Address • Ledger Card Activity
Statement Comment	Enter a comment that you want printed at the top of each statement.
Registration Comment	Enter a comment that you want printed with the registration information.
Aid Status to Include	Select the aid status to include: • Estimated • Pending • Approved
Balance Option	Select one or more of the following options to specify how the Summary and Detail reports are to be filtered: • Include Negative Balance • Include Zero Balance • Include Positive Balance
Expected Funding	Select one of the following fund types to print: • Do Not Print Expected Funding • Print ALL expected funding • Print Expected Funding through specified term

Auto Add Course Section Setup

Many institutions offer online course sections that are administered without the constraints of traditional course sections. Although online classes have maximum seat counts, institutions create new sections as demand for online courses justifies the need for a new section.

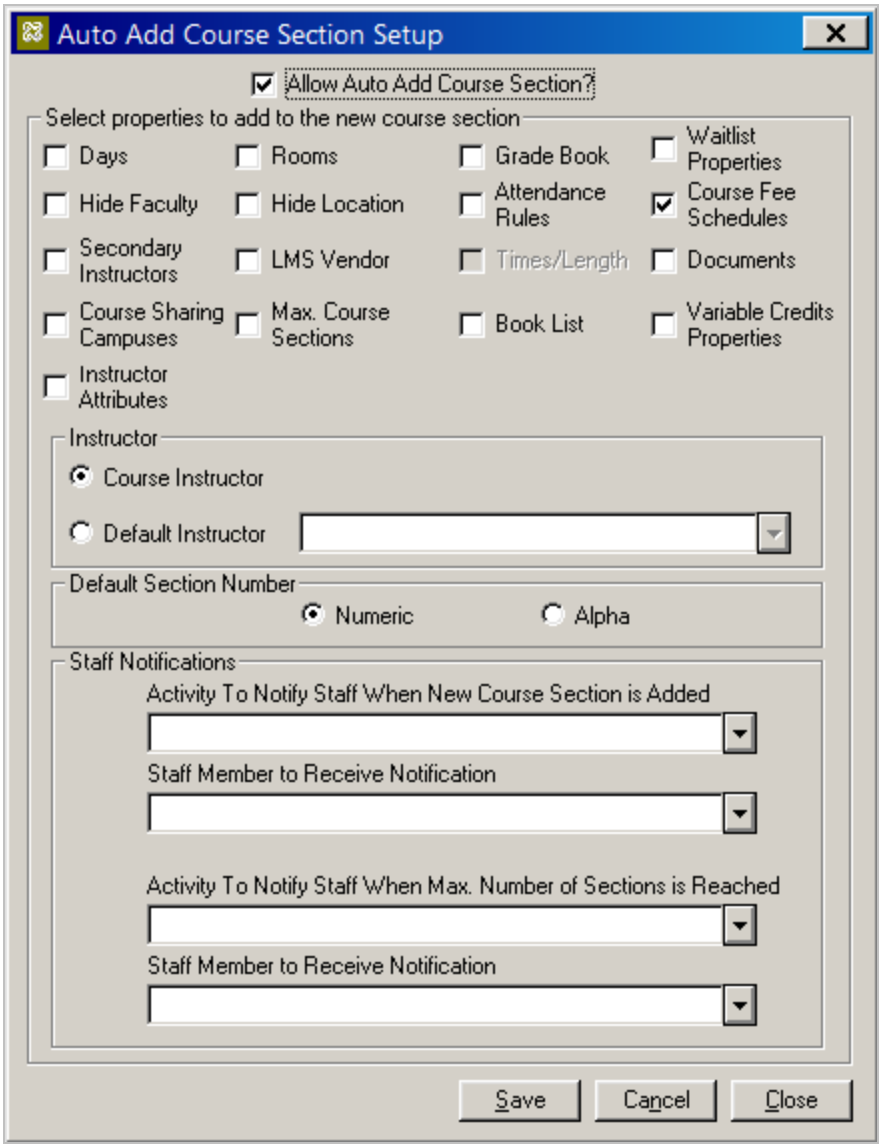
You can configure CampusNexus Student to add new course sections when online courses reach their capacity filled. This eliminates the need to manually check course sections and accommodates student overflow from one section to another (i.e., removing complexities associated with moving students from one section to another).

Note: This feature is available for online courses only.

See also Courses, Delivery Methods, Class Schedule, and Waitlists.

To configure auto add course section:

1. Navigate to **Setup** > **Campus Locations** > select a campus > **Add/Edit** (button) > **Acad. Records** (tab) > **Others** (tab).
2. On the Others tab under Auto Create Course Section, click **Setup**. The Auto Add Course Section Setup form is displayed.
3. To activate this feature, select **Allow Auto Add Course Section?**



4. Select appropriate properties to add to the new course section.

   Important Notes:

   - If **Course Fee Schedules** is selected, CampusNexus Student copies the course fee schedules to the course section with the default and view settings. When it is cleared, CampusNexus Student copies the course fee schedules to the course section without any of the default or view settings. To enable the Course Fee Schedules functionality, select the **Allow Auto Add Course Section?** check box and select the **Course Fee Schedules** check box.
   - If **Book List** is selected, the Book List(s) (with books) of the already filled course section is copied to the new course section. If the check box is not selected, only the default Book Lists contained in the course configuration are assigned to the newly created course section.
   - If **Variable Credits Properties** is selected, the Credits, Hours, Min. Credits, Max Credits, and Allow

Override During Registration settings of the already filled course section are copied to the new course section. If the check box is not selected, the settings are copied from default settings contained in the course configuration.

When a new course section is automatically created, if the Enforce Last Day to Withdraw feature is part of the configuration for the existing course section's campus (Setup > Campus Locations > Edit/Add > Academic Records (tab) > General (tab)), the new course section is populated with the LDW date of the existing course section.

- If **Instructor Attributes** is selected, instructor attributes are copied to the new course section when a new course section is automatically created. This only occurs if Auto Add Course Section is configured to include instructors.
    - If Course Instructor is selected, the newly created course section copies the instructor attributes from the original section.
    - If Default Instructor is selected, the attributes copied to the new course section are the attributes for the default instructor.

  If the Instructor option is not enabled and the Secondary Instructor option is not selected, the Instructor Attributes check box is disabled. By default, the Instructor Attributes option is cleared.

5. Select an **Instructor** option.
    - If you select Course Instructor, the newly created course section copies the instructor attributes from the original section.
    - If you select Default Instructor, choose a default instructor from the list.
6. Select **Numeric** or **Alpha** as the default section number.
7. Select **activities** and associated staff members:
    a. In the 'Notify Staff When New Course Section is Added' field, select an activity.

       In the 'Staff Member to Receive Notification' field, select the staff member that is assigned the activity.

    b. In the 'Activity to Notify Staff When Max. Number of Sections is Reached' field, select an activity.

       In the 'Staff Member to Receive Notification' field, select a staff member.
8. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Note: When you edit a campus, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.

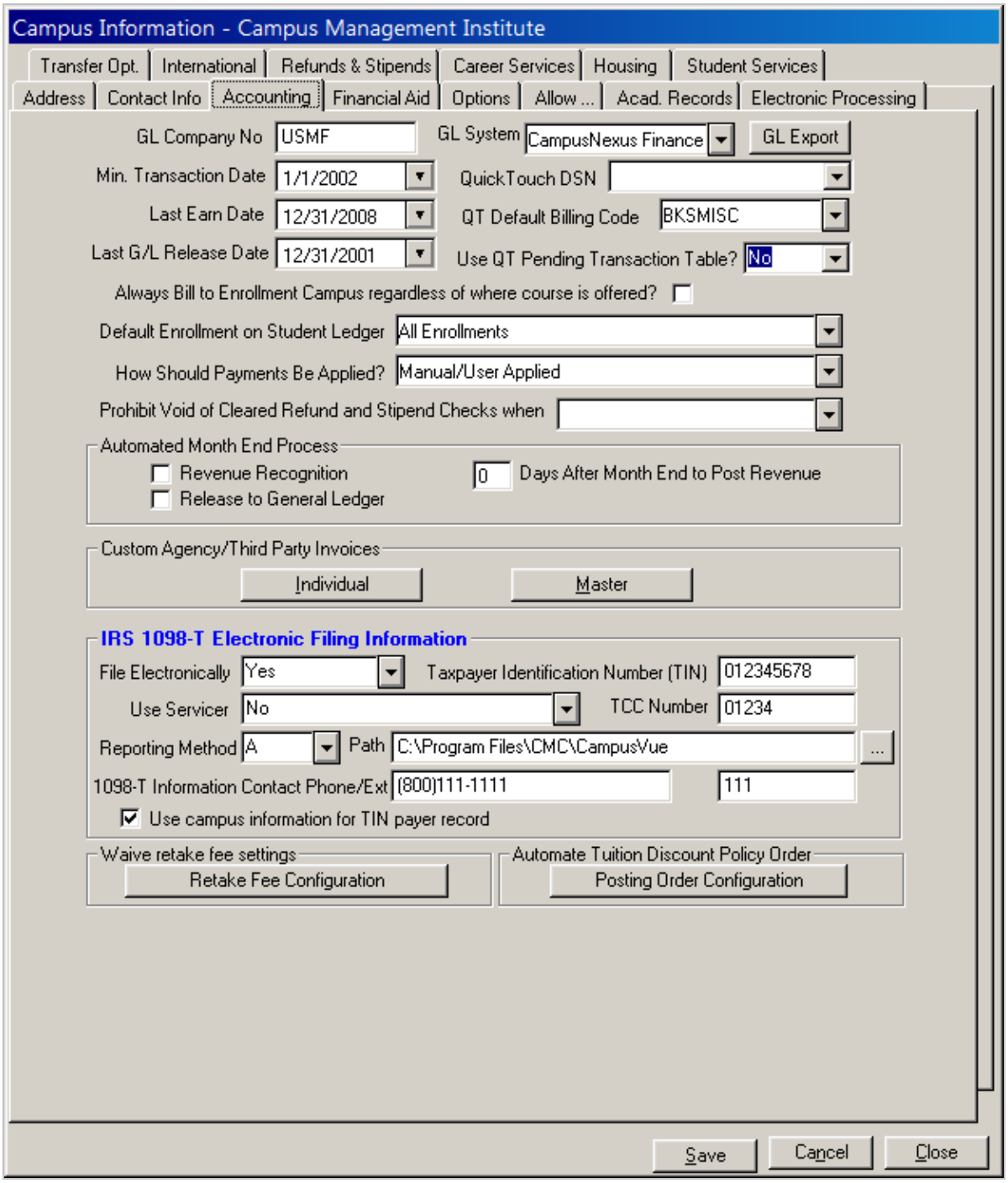
Campus Information - Accounting Tab

Use the Accounting tab on the Campus Information form to set up information related to financial procedures in CampusNexus Student. Configurations on this tab are important if your institution requires general ledger posting information and exports files from CampusNexus Student to your accounting system.

To add or edit accounting data for a campus:

1. Navigate to **Setup** > **Campus Locations** > select a campus > **Add/Edit** (button) > **Accounting** (tab).

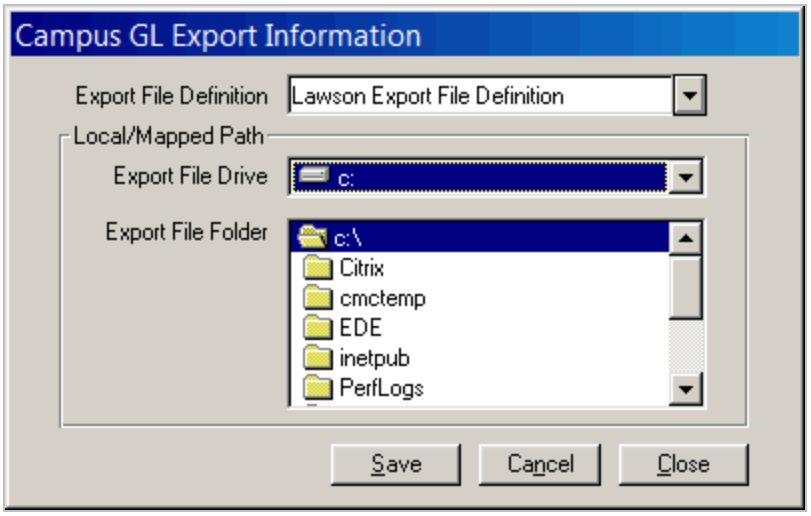
   Note: The fields on the Accounting tab vary depending on the selected accounting system (GL System).



2. Specify appropriate options. For more information, see Field Descriptions.
3. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Note: When you edit a campus, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.

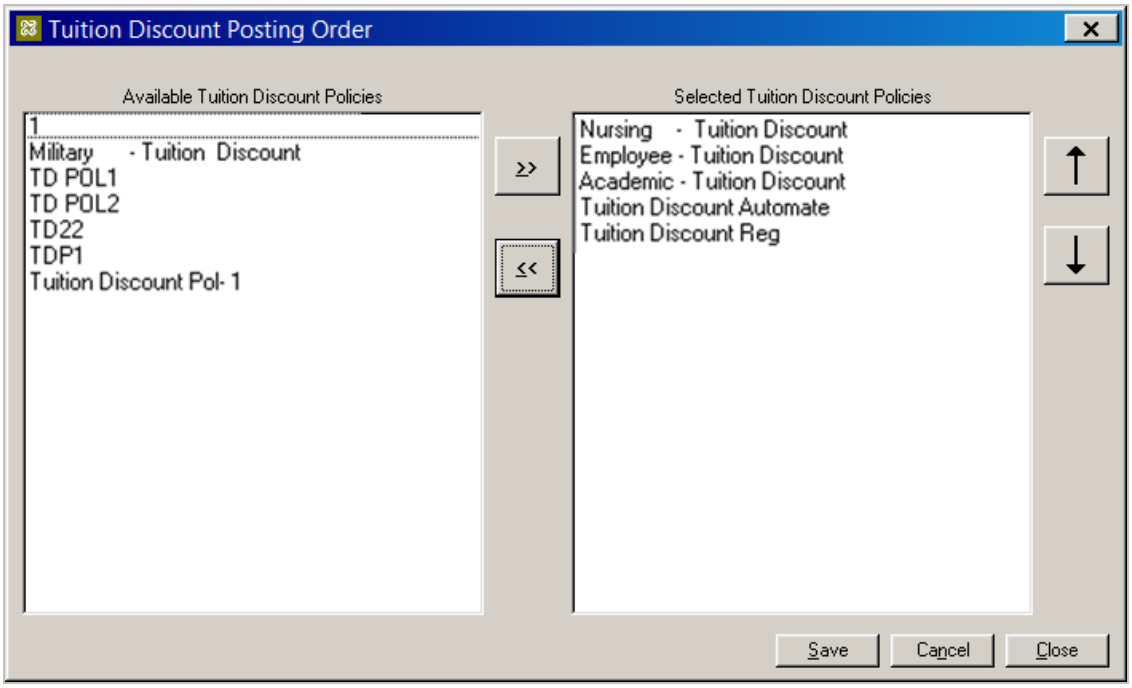
Field Descriptions

Field	Description
GL Company No	Enter the number (up to 8 characters) by which this campus is identified as a company in your accounting system. Multiple campuses can have the same company number.
GL System	GL Systems are external accounting applications for which CampusNexus Student can provide importable transaction files with the proper record layout. The options are: • Great Plains (see Settings for GL System "Great Plains") • Other • None • CampusVue Finance, HR & Payroll (see Settings for CampusVue Finance, HR & Payroll) **Note**: The reports provided by CampusNexus Student can be used to prepare manual journal entries even if your accounting system is not on the list.
GL Export	The GL Export button is enabled for the GL System options Great Plains and Other. Click **GL Export** to select the Export File Definition and the Export File Drive and Folder. 
Min. Transaction Date	This is the date before which ledger transactions will not be accepted. This date must be updated manually. It is normally updated after you run the Release to General Ledger procedure. CampusNexus Student reject transactions with dates earlier than this date.
Last Earn Date	This field is filled in by CampusNexus Student when you run the Revenue Recognition procedure.
Last G/L Release Date	This field is filled in by CampusNexus Student each time you release transactions to your general ledger system (see Daily/Student Accounts/Release to General Ledger).

Field	Description
Always Bill to Enrollment Campus regardless of where course is offered?	Use this option to designate which ledger card should be posted with a registration billing – the ledger card at the campus at which the student is enrolled or the ledger card at the campus at which a course is offered. The default is to post to where the courses are offered. If no current value exists for the campus selected, the check box is cleared by default. If the billing method for the student has a frequency of program, academic year, or term, and does not use a rate schedule, the charge will be billed to the student's enrollment campus regardless of whether this check box is selected. If you select this check box and... a. you have multiple campuses, and b. you are currently billing by course, and c. you have students taking courses at more than one campus , ... you will change where registration billing transactions are posted.
Default Enrollment on Student Ledger	Specify the initial default view of a student's ledger card when the Ledger Card form is loaded. The options are: • Current Enrollment • All Enrollments
How Should Payments be Applied?	Select how to apply credits to debit balances on the student's ledger card. The options are: • Auto Apply Using Hierarchy – Payments (credit transactions) posted to the ledger card are automatically applied to charges (debit transactions) that have not been applied. When the payment is a non-financial aid source, CampusNexus Student uses the default payment applications hierarchy for the campus to apply the payment. If the payment is a fund source payment, the payment application hierarchy for the fund source is used. See Configure_Payment_Apply_Order to configure the default campus payments/fund source application hierarchies. • Manual/User Applied – This option lets you to manually choose how payments get applied. See Apply Payments to Charges for more information.

Field	Description
Prohibit Void of Cleared Refund and Stipend Checks when	To control whether users can void a refund or stipend check if the check status is 'Cleared', select one of the following options: • Check Cleared Date is not blank • Check Cleared Date is not blank AND Check Status is "Cleared" • Check Status is "Cleared" When a user highlights a refund or stipend from a student's ledger card and selects 'Adjust Transaction', CampusNexus Student checks if the check is cleared. The determination of whether the check is cleared is based on the definition assigned in the campus configuration (i.e., the three conditions noted above). If the user chooses to adjust a refund or stipend check that is cleared, the 'Void This Transaction' button is not enabled on the 'Void Refund/Stipend Check' form, prohibiting the user from voiding the refund or stipend check. **Note:** Beginning with CampusNexus Student 14.0, you can set up unique debit and credit accounts for stipends so that you do not have to use the same accounts as your refunds.
Path to Great Plains Dynamics DB	If your campus uses Great Plains, click the button to specify the connect string to the Great Plains Dynamics database. Use your Windows or SQL Server authentication to connect, click **Test** to test the connection, and click **OK**.
Path to Great Plains Company DB	If your campus uses Great Plains, click the button to specify the connect string to the Great Plains Company database.Use your Windows or SQL Server authentication to connect, click **Test** to test the connection, and click **OK**.
Batch ID	Specify a Batch ID. It is usually non-numeric but can be numeric. For example, if the Batch ID is set to "Austin", every batch starts with "Austin".
Automated Month End Process	Select the process you want to run as an automated month end process. The options are: • Revenue Recognition • Release to General Ledger Specify the number of Days After Month End to Post Revenue.
Custom Agency/Third Party Invoices	Select an appropriate option for processing custom agency/third party invoices: • Individual - Process individual invoices using Crystal Reports • Master - Process master invoices using Crystal Reports

Field	Description
IRS 1098 -T Electronic Filing Information	Select appropriate IRS 1098 -T Electronic Filing Information. The options are: • File Electronically – Select Yes if your school files electronically. • Use Servicer – Select Yes if your school uses a servicer such as Global Financial Systems. • Taxpayer Identification Number (TIN) – Specify the IRS taxpayer identification number for the institution that will file 1098-Ts. • Transmitter Control Code (TCC) Number – Specify the TCC number assigned to your school by the IRS for filing 1098-Ts electronically. This must be five alphanumeric characters. • Reporting Method – CampusNexus Student supports only one method of reporting: Amount Billed (A). Institutions need to specify the reporting method they use for processing 1098-Ts: Amounts Billed or Payments Received. Reporting methods cannot be switched without consent from the IRS. • Path – Click to select a location in which export files will be stored. • 1098-T Contact Information Phone – Specify the appropriate phone number. • Ext – Specify the extension of your 1098-T contact. • Use campus information for TIN payer record – **Note**: After the initial system setup, CampusNexus Student manages the dates listed in the table. We recommend that you not attempt to adjust them without prior consultation with CampusNexus Student Support.
Waive retake fee settings	Use the configurations described below when retake fees will be waived if the previous grade was a passing grade or failing grades or if the student enrolled after course start date. Click **Retake Fee Configuration** to display the configurations. • Waive if previous retake grade is passing – Retake fees will be waived if the previous grade was a passing grade. • Waive if previous grade is failing – Retake fees will be waived if the previous grade was a failing grade. • Waive if registered after course start date – Retake fees will be waived if the student registers in a course after the course start date. • Number of days if registered after course start date – If waiving the retake fees due to the student registering in a course after the course start date, configure the number of days past the course start date that a student can register in the course to determine when the waiver of the retake fees will occur. The number of days must not exceed 999 days.

Field	Description
Automate Tuition Discount Policy Order	Use this form to configure and save the posting order for the campuses selected for a tuition discount. Click **Posting Order Configuration** to display the Tuition Discount Posting Order form.  Under **Available Tuition Discount Policies**, select Tuition Discount Policies and click >>. Your selected policies now appear under the **Selected Tuition Discount Policies section**. Use the Up and Down arrows to establish your posting order for the policies. Click **Save** to keep your posting order. To remove policies from your posting order, highlight the policies and click <<. Your selected policies now appear under the Available Tuition Discount Policies section.

Settings for GL System "Great Plains"

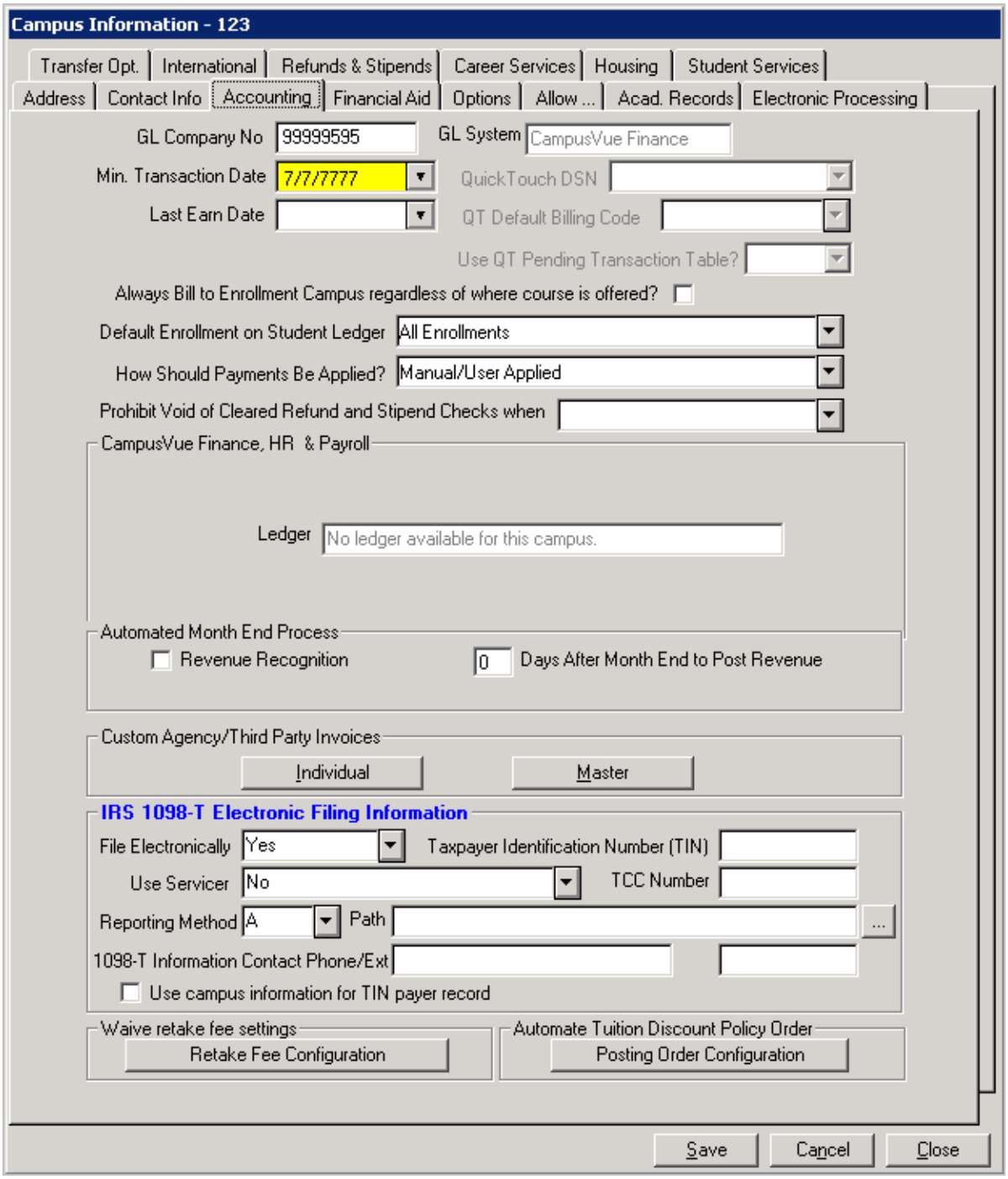
If your campuses use Great Plains, you must enable the following settings to use the Great Plains General Ledger Account search feature.

- In the General tab (Setup > Student Accounts):
  - Set the GL/AP Package to GREAT PLAINS.
  - Set Integrate with GP to Yes.
  - Set Integrate Bank Rec w/GP to Yes if you want the Bank Reconciliation portion to be turned on; otherwise set it to No.
  - Set Map GP GL Account Search to any positive number from 1 to 50,000. This field specifies the number of records that the search results display in a page. The default number is 500.

- In the Accounting tab:
    - Set GL System to Great Plains.
    - Specify the connect string for the Great Plains Dynamics DB.
    - Specify the connect string for the Great Plains Company DB.
    - Specify a Batch ID. It is usually non-numeric, but it can be numeric. For example, if the Batch ID is set to "Austin", every batch starts with "Austin".

Settings for CampusVue Finance, HR & Payroll

When CampusVue Finance, HR & Payroll is installed, the GL System field displays 'CampusVue Finance' and the drop-down list is disabled. In addition, the current fiscal year that is assigned in Journal Entry Group Setup is displayed in a read-only mode.



The 'Minimum Transaction Date' field is used in CampusNexus Student; however, if the fiscal period for the CampusNexus Student module is closed in CampusVue Finance, HR & Payroll, it updates this minimum transaction date to the first date of CampusVue Finance, HR & Payroll's open period if the minimum transaction date is less than the new period's start date. This prevents invalid entries, using the most restrictive date. An error message is displayed if this is the case.

The minimum transaction date may not be changed to a date greater than the transaction date of any records in the error log of CampusVue Finance, HR & Payroll. This forces users to make corrections to clear out the error log before the period can be closed or before the minimum transaction date can be pushed forward. The error indicates which GL accounts are invalid, along with the applicable area, such as Setup - Student Accounts - GL Links, Lists - SA - Bank Codes, or Lists - SA - Subsidiaries where the user can correct the account number. Once this is done, the error log is cleared the next time the automatic release process runs.

Using today's date to determine the fiscal year, the system checks the campus group the campus is assigned, looks up the Ledger assigned, and displays it in the 'Ledger' field as read-only information.

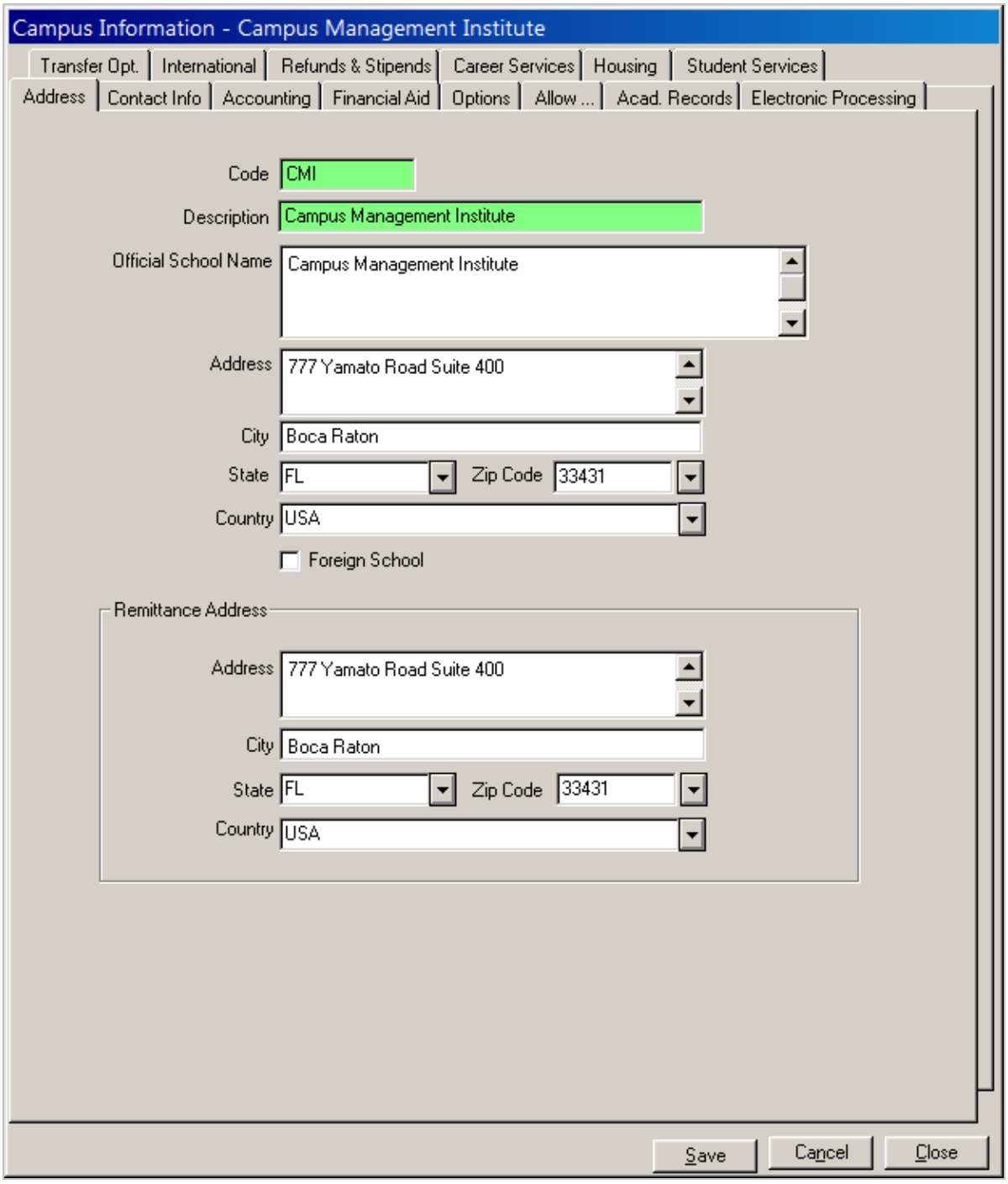
The 'Last G/L Release Date' field is removed because there will be a process running to move GL information to CampusVue Finance, HR & Payroll, therefore, the field will not need to be updated.

Campus Information - Address Tab

Use the Address tab on the Campus Information form to set up the code and description for the campus address in the CampusNexus Student database.

To add or edit address data for a campus:

1. Navigate to **Setup** > **Campus Locations** > select a campus > **Add/Edit** (button) > **Address** (tab).



2. Specify a unique **Code**.
3. Enter a **Description**.The Description field is used on most forms and reports in CampusNexus Student.
4. Specify the **Official School Name** (up to 120 characters) to use on formal documents such as transcripts. A merge field for the official school name is available for use with letters.
5. Specify the **Address**, **City**, **State**, **ZIP Code**, and **Country**.
6. If applicable, select **Foreign School** (by default the check box is cleared).

   Note: This option is used for Common Origination and Disbursement (COD) purposes in support of the current Common Record XML schema requirements. Enabling this flag restricts the population of the Program of Study tag to foreign schools. The Program of Study tags for foreign schools are linked with CIP codes based upon the following program grouping logic:

   Program of Study Codes

Program of Study Code	Description
01	Medical
02	Nursing
03	Veterinary
04	Other

7. Specify the **Remittance Address** if it is different from the official address. This allows you to use the return coupons printed on students' statements and third party or agency invoices. The Remittance Address can be configured for each campus. For example, schools may need the official address on transcripts but not on the payment coupons.

   - When the remittance address is configured, it is printed within the return coupon section of the statement or invoice.
   - When the remittance address is left blank, CampusNexus Student uses the campus address, if configured.

   The remittance address fields appear as mail merge fields and are available for selection when adding or editing letters.
8. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Note: When you edit a campus, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.

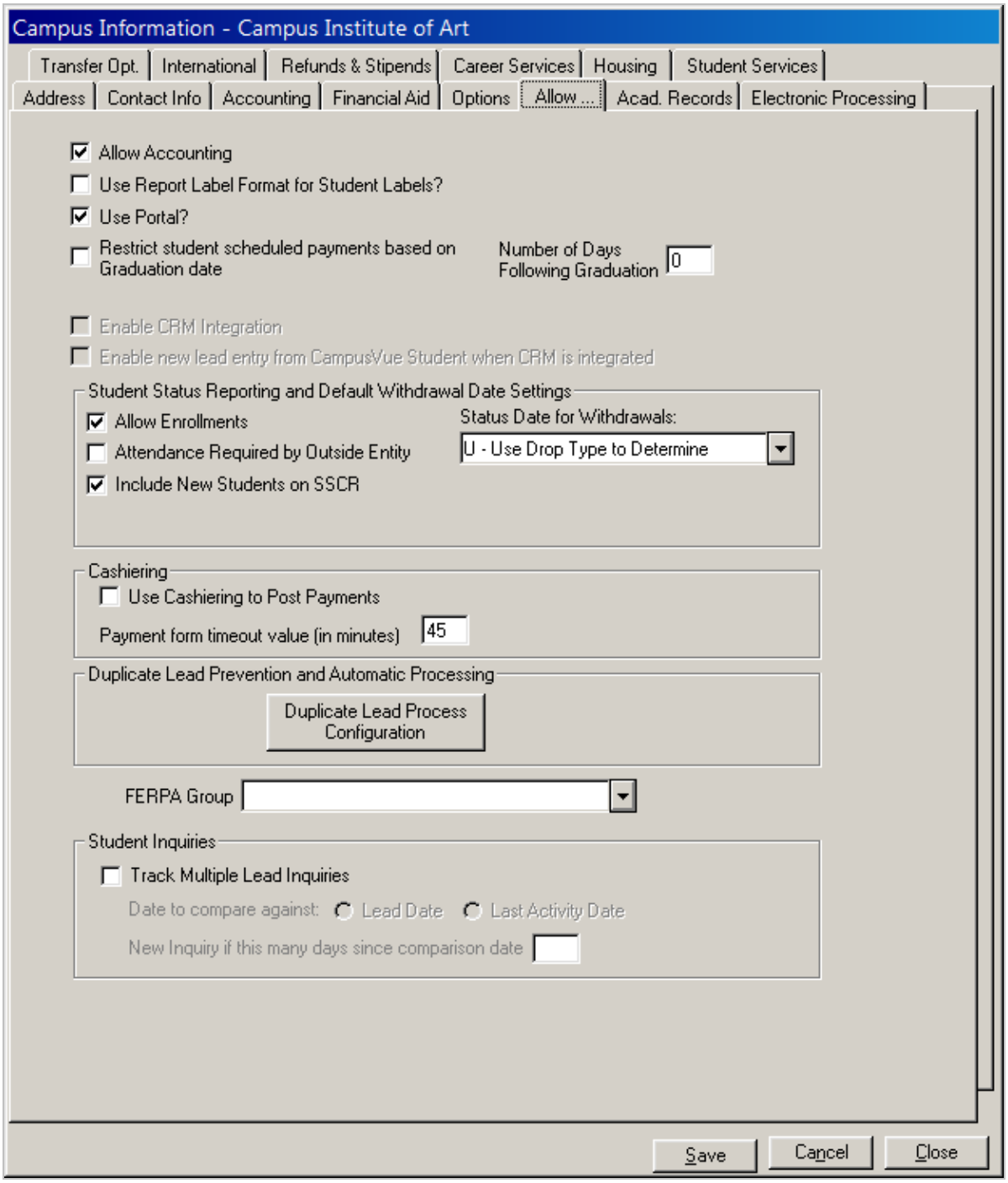
Campus Information - Allow Tab

Use the Allow tab on the Campus Information form to enable or disable some functional areas in CampusNexus Student for the selected campus. Special circumstances may apply to a campus when an institution defines it in a narrow context. Under these conditions, the institution may not want the campus to enroll students or post accounting transactions. One possible use for these options would be for a telemarketing effort to generate leads for other campuses. These options might be used in a start-up scenario for a campus in which only the admissions features are required.

Use this tab also to configure a print label format. CampusNexus Student prints labels from the Student Master in a defined label format. To accommodate international address labels, the format may vary. You can define a label format to be used instead of the system-defined label format.

To allow or disallow enrollments and/or accounting transactions, or to select a label format:

1. Navigate to **Setup** > **Campus Locations** > select a campus > **Add/Edit** (button) > **Allow...** (tab).



2. Specify appropriate options. For more information, see Field Descriptions.
3. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Note: When you edit a campus, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.

Field Descriptions

Field	Description
Allow Accounting	Select whether accounting transactions are allowed. • If this option is selected (default), accounting transactions are allowed. • If this check box is cleared, no accounting transactions can be posted at the selected campus, i.e., no student ledger cards, no revenue accounting, no transaction code setup, and so on.
Use Report Label Format for Student Labels?	Define a report label format to be used instead of the system-defined label format. • If you select this option, all reports with the `lst_SyLabel%.rpt` file name format are listed. You are prompted for a file name. Select the Label Report Name to use for the Student Labels from the reports listed. • If this box is cleared, the generic label format is used.
Use Portal?	Indicate whether the selected campus uses Portal. If the option is selected, the option for Online Registration Configuration becomes visible in the Daily > Academic Records menu. Select this option when you create a portal group. You can then configure that group to be available to the Portal administrator for customization of web content, including granting portal access to custom home pages, content channels, custom web parts, etc. To configure student groups for portal filters, select the following options: • 'Active' on the Student Groups form • 'Make Group for Portal Content' on the Save New Group form. To access the Make Group for Portal Content check box, when the Master Student Listing Summary is displayed, from the Report Viewer, select Report > Save Student Group. On the Save New Group form, enter the Group Name, select the Group Type, and select the Make Group for Portal Content check box. **Note**: The Save New Group form also is displayed when you save the result set of a search to a new group.
Restrict student scheduled payments based on Graduation date	Select this option to restrict users from scheduling payment plans that end more than a configured period of time past the grad date.
Number of Days Following Graduation	Specify the number of days following graduation. This is a school-defined rule for the last day on which users may schedule a payment.

Field	Description
Enable CRM Integration	Select this option to enable the campus for integration with a CRM product. The default is disabled. The value of this setting is stored in the CampusNexus Student database SyCampus table. • If this check box is selected, the CampusNexus Student database launches the triggers associated with the campus level CRM integration functionality. The outgoing transaction queue database tables are populated with outgoing transaction messages such as campus student records and enrollment records. • If this check box is cleared, the CampusNexus Student database does not launch the triggers associated with the campus level CRM integration functionality. The outgoing transaction queue database tables are not populated with outgoing transaction messages.

Field	Description
Enable new lead entry from CampusNexus Student when CRM is integrated	Select this option to allow new lead and new student records to be entered directly into CampusNexus Student through the user interface. This configuration is only applicable when CRM is integrated with CampusNexus Student on a campus by campus basis. When this check box is cleared (default), you are not allowed to enter new leads or new student records directly into CampusNexus Student for this campus. The paths within CampusNexus Student where the creation of new lead/student records are restricted include: • File > Add New Lead ( ) • File > New Lead (full) • Daily > Admissions > Process Electronic Leads • Daily > Admissions > Batch Quick Lead Entry **Notes**: • If CRM Integration (Setup > System > Integration) is selected and Enable CRM Integration is cleared, this field is disabled. • If this field is selected and Enable CRM Integration is cleared, this field automatically becomes disabled without a warning message. • When you create a new student from the Student Master, a campus will not be available for selection if (system level) CRM Integration is selected and (campus level) Enable CRM Integration is selected, and the (campus level) 'Enable new lead entry from CampusNexus Student when CRM is integrated' check box is cleared. In all other scenarios, a campus is available for selection. • When you create a New Lead (full) for the default campus, if both (system level) CRM Integration and (campus level) Enable CRM Integration are selected, but (campus level) 'Enable new lead entry from CampusNexus Student when CRM is integrated' is cleared, the following message is displayed: "*Your default campus, Campus Management Institute, is integrated to CRM. To add a lead (or student) to this campus, use CRM. To add a lead to a different campus, please select the campus from the drop-down.*" You can create New Lead/Student records in CampusNexus Student according to the settings listed in the table below: **CRM Settings Matrix** **CRM Integration (System level CRM integration)** / **Enable CRM Integration (Campus level CRM integration)** / **Enable new lead entry from CampusNexus Student when CRM is integrated** / **Allow create Lead/Student for a campus?** OFF / OFF / OFF / YES ON / OFF / OFF / YES ON / ON / OFF / NO

Field	Description
Student Status Reporting and Default Withdrawal Date settings	These settings allow campuses to define configurations that are applicable to National Student Loan Data System (NSLDS) reporting, particularly in relation to reporting withdrawal dates. Student status data is reported to the NSLDS via the SSCR or Clearinghouse reports. The Department of Education set guidelines for how withdrawal dates should be determined. The Attendance Required by Outside Entity and Status Date for Withdrawals settings are critical to ensuring accurate withdrawal dates in CampusNexus Student. These two fields drive the logic for calculating the NSLDS Withdrawal Date on students who are withdrawn from school. Although it is not as common for an institution to be mandated to take attendance, the Attendance Required by Outside Entity option is available for configuration at the campus level. This setting can also be configured for individual program versions and/or fund sources. Regardless of the location of this setting, the option allows institutions to report the Last Date of Attendance (LDA) as the NSLDS Withdrawal Date on all withdrawing students regardless of the Official or Unofficial withdrawal designation. This also applies to students who do not return from an LOA and are subsequently dropped (instead of the date that a student began the LOA, if a student attending one of these institutions fails to return from that LOA, the LDA is reported as the NSLDS Withdrawal Date). It is important to consider that if an institution has an internal policy requiring to take attendance, this does not meet the definition as applied to the regulation. An institution is considered to be required to take attendance "only if an outside entity such as an accrediting agency requires them to do so." Only institutions that meet this criteria should use the Attendance Required by Outside Entity check box configuration. The Department of Education mandates that a student's withdrawal date be treated differently in scenarios where attendance is NOT required to be taken. In this scenario, institutions can still opt to use an LDA as the NSLDS Withdrawal Date if they can document attendance was related to an academic activity. In many cases institutions do take attendance (despite not being mandated to do so) and have published attendance and withdrawal policies within their school catalog. Institutions that do not take attendance, or only do so based on an internal policy, should rely on the Status Date for Withdrawals setting to dictate the NSLDS Withdrawal Date logic. If a campus is not required, but opts to take attendance per a published attendance and withdrawal policy, the recommended Status Date for Withdrawals setting is L-LDA. This ensures that the default NSLDS Withdrawal Date calculation on Unofficial withdrawals are in relation to the LDA. Campuses with this configuration can use an additional field to define the number of days that should be added to the LDA to comply with their policy. If a campus is a non-attendance taking Institution (may take attendance

Field	Description
	periodically, but not regularly and has no established attendance withdrawal policies), the Status Date for Withdrawals setting should be U-Use Drop Type to Determine. With this configuration, the NSLDS Withdrawal Date for Unofficial withdrawals is calculated using Financial Aid Academic Calendar and Return of Title IV period definition settings. For students who fail to return from an LOA at an institution that is not required by an outside entity to take attendance, the NSLDS Withdrawal Date continues to calculate the LOA Begin Date as the NSLDS Withdrawal Date.
Allow Enrollments	Select this option to enable this feature. If this box is cleared, no students can be enrolled at the selected campus. The default is to allow enrollments.
Attendance Required by Outside Entity	Select this option for all students enrolled at the campus, per description above. This check box must be selected to report to the SSCR (NSLDS).
Include New Students on SSCR	Select this option to add all attending enrollments that are not already included in the SSCR roster file regardless of whether they are receiving Title IV aid. A student who does not have a Title IV loan at your institution might have received Title IV elsewhere, therefore, current enrollment status information is used to assess that student's potential deferment privileges.
Status Date for Withdrawals	Select an option from the drop-down list. • When attendance is required by an outside entity, Status Date for Withdrawals is disabled because LDA will always be used to calculate the NSLDS Withdrawal Date. • When the attendance check box is not selected (indicating that attendance is not required by an outside entity), Status Date for Withdrawals is enabled. If attendance is not required, the options are: • L - LDA (Last Date of Attendance) • U - Use Drop Type to Determine. When a student is reported to the NSLDS as a withdrawal student, the effective date of this status change is reported via the SSCR or Clearinghouse reports based on the date calculated as the NSLDS Withdrawal Date. The calculation of default NSLDS Withdrawal Dates depends on the setting of this flag.
Number of Days to Add to LDA on Unofficial Withdrawal	Enter a value to correspond with the campuses institutional attendance withdrawal policy when the Status Date for Withdrawals setting is L-LDA. For more information on how NSLDS Withdrawal Dates are calculated, see Default Date Calculation for Drop Status Change.

Field	Description
Cashiering	Select this option to enable the cashiering functionality. Specify the time-out value for the Post Payment form. If there is no valid action on the form for the time configured, the form is locked. A valid CampusNexus Student user ID and password is required to unlock it.
Duplicate Lead Process Configuration	Click Duplicate Lead Process Configuration to access the forms to determine the processing steps in CampusNexus Student when a new lead record is determined to be a duplicate of a record already in the database.
FERPA Group	Select the FERPA Directory Group to assign to this campus from the drop-down list. See also FERPA Document Settings.
Student Inquiries - Track Multiple Lead Inquiries	Select this option to enable tracking each time a prospective student inquires about enrollment. When you enable multiple inquiries, select **Lead Date** or **Last Activity Date** as the date the inquiries are compared with to find the latest entry. If this option is disabled, the View > Admissions > Inquiry menu option is hidden. Several Admissions reports require this option to be enabled to display and print multiple lead inquiries.You can establish the number of days that an inquiry can remain unchanged before it becomes a new inquiry by setting the **New Inquiry if this many days since comparison date** value. When processing duplicates, CampusNexus Student checks the number of days since the Last Activity Date or Lead Date, creates a new inquiry record, and sets it to be a current inquiry records, or does not create an additional record. If a zero value (0) is entered, student inquiries may be captured and stored on the same day, a 1 indicates the next day, and so on. **Note**: The Response Number, Response Time, and Response Date fields are displayed on the Student Inquiry form only if 'Track Multiple Lead Inquiries' is selected and 'Capture Advertising Information' is selected on the Lead Sources Code Setup form (List > Admissions > Lead Sources > Add/Edit Lead Source > Lead Sources Code Setup).

Contact Manager Setup - FERPA Groups Tab

The Family Educational Rights and Privacy Act (FERPA) is a federal law that protects the privacy of student education records. The law applies to all institutions that receive funds under an applicable program of the U.S. Department of Education. FERPA gives eligible students certain rights with respect to their education records.

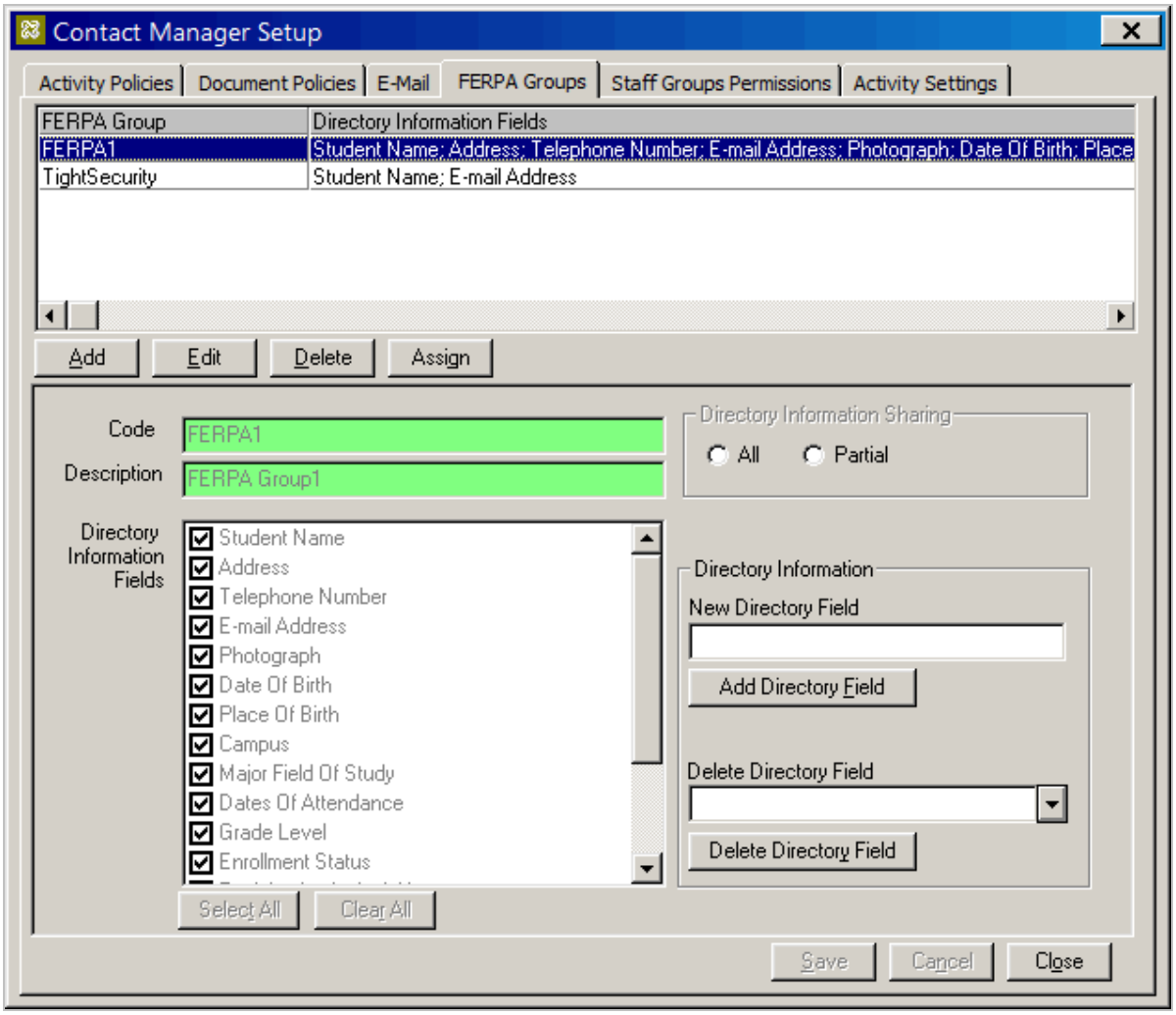
For instance, institutions are required to notify students annually of specific directory information - such as student name, address, telephone number, email address, etc. - that can be disclosed to individuals outside of institution employees or designees. Institutions must give students a reasonable amount of time to opt out of this disclosure. Unless students opt out, institutions may disclose this directory information without the students' consent; if students opt out of disclosure, the institution must obtain consent from the students before releasing the information.

CampusNexus Student enables you to perform the following tasks:

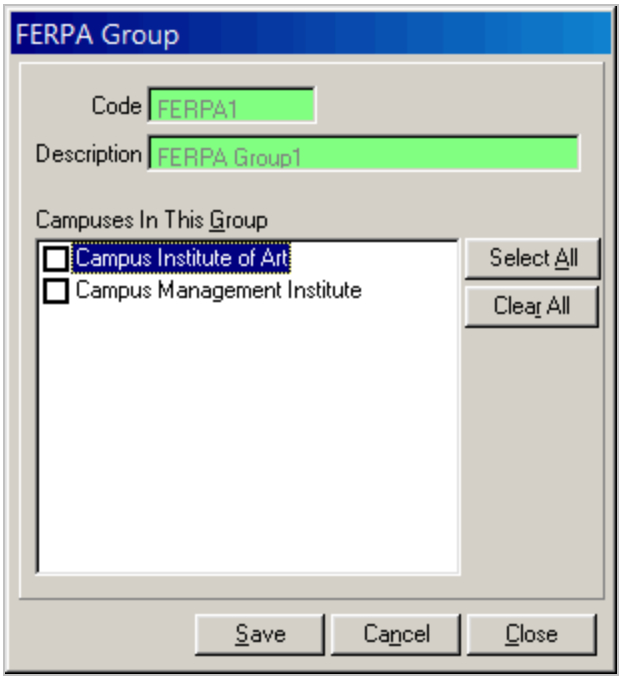
- Create FERPA directory information groups and assign them to campuses. See Campus Allow.
- Notify students when their FERPA information is changed.
- Configure release permissions and designations for student FERPA directory information and academic Information.
- Generate the FERPA Opt-out report.
- Allow students to view the FERPA directory information and academic Information.

To create a FERPA directory group:

1. Navigate to **Setup > Contact Manager > FERPA Groups** (tab).



2. Specify a unique **Code**.
3. Enter a **Description**.
4. Select the **Directory Information** fields to configure the release permissions and designations for your institution.
5. Click **Save**. Your fields selections are saved as a group that can be assigned to individual campuses.
6. Click **Assign**. The FERPA Group form is displayed.



7. Select the **Campuses** that you want to associate with your FERPA Group.

   When your FERPA group is assigned to campuses, site administrators can configure by campus whether CampusNexus Student prompts the user with the student document form after changing FERPA information. For this to occur, you must select **Yes** in the FERPA Document? field on the System Settings > General tab. If you select Yes, all changes to FERPA designations for students, both directory and academic, cause a document form to be displayed.

8. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Note: When you edit a campus, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.

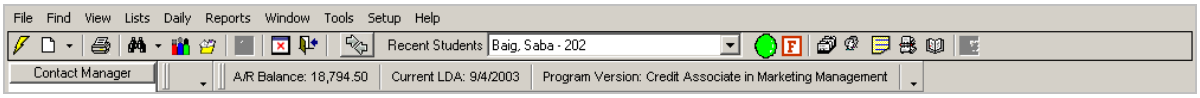
FERPA Document Settings

Institutions are required to notify students annually of specific directory information – such as student name, address, telephone number, email address, etc. – that can be disclosed to individuals outside of school employees or designees. Institutions must give students a reasonable amount of time to opt out of this disclosure. Unless students opt out, institutions may disclose this directory information without the students' consent; if students opt out of disclosure, the institution must obtain consent from the students prior to releasing the information. See also Student Master fields regarding the Data Block Indicator.

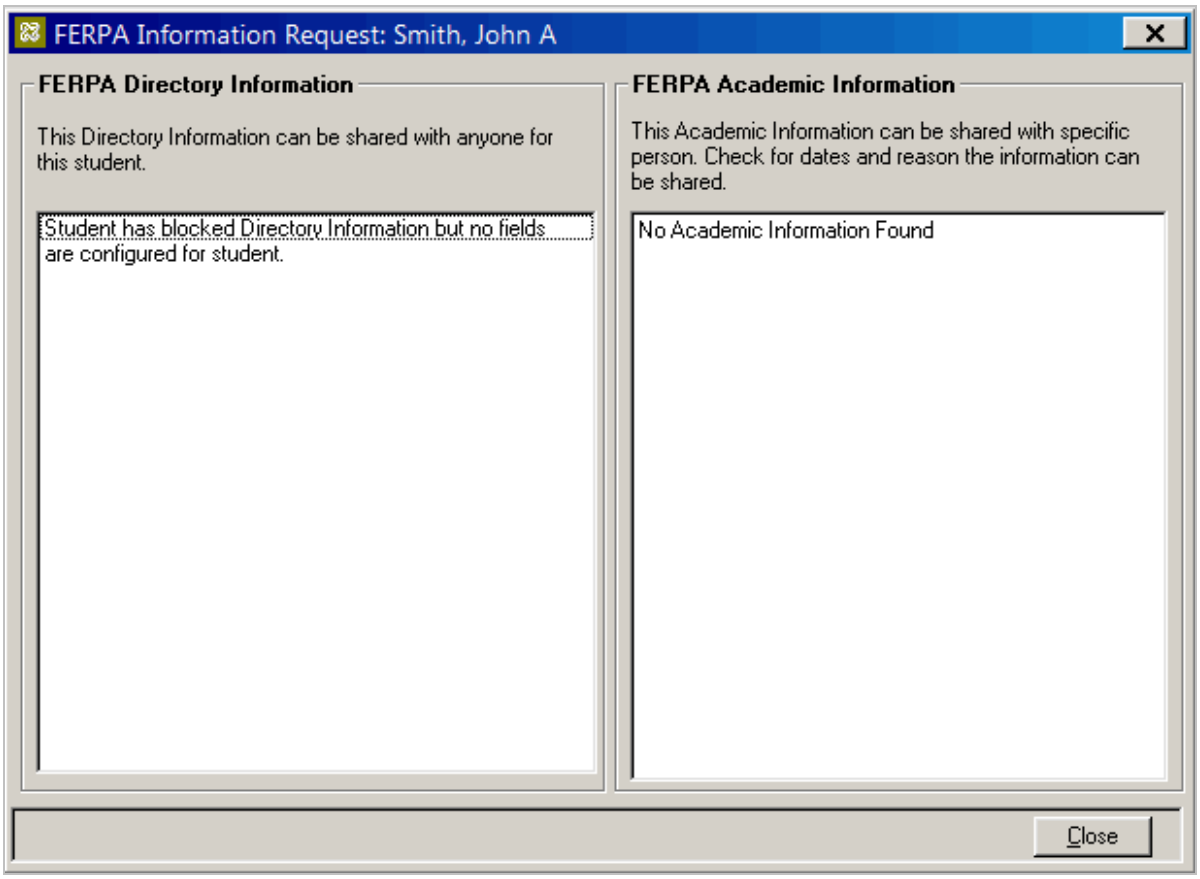
To opt out of this disclosure:

1. Navigate to **Setup** > **System** > **General** (tab), locate the FERPA document? attribute and select **Yes**.

   This selection allows your student record to be saved with Data Block designation and records the date the change was made. It also causes the F icon to be displayed on your student bar.



2. After you have provided all required information, click F to view your FERPA Information Request form. The form displays the list of fields in the campus-level FERPA group that you have selected to block, lists the names of people you have authorized to obtain your academic information, and identifies the information they are allowed to obtain.



3. Set up each Contact Manager Policy for FERPA Groups.

4. Add the FERPA Document to your list of documents.
5. Assign a FERPA Group to a campus.
6. View the FERPA Opt-Out report which displays the users who elected to block release of the FERPA directory information. This report shows the names associated with any addresses, the address types that have been given access to academic records, and the academic fields that are available to the specified address.

Duplicate Lead Processing

When a New Lead is entered on a Quick Lead or Student Master form, the duplicate lead processing function checks if a possible duplicate record is on file. The rules set up in Duplicate Lead Process Configuration determine how an institution deals with duplicate leads.

Electronic leads are those imported from electronic sources outside of CampusNexus Student through Portal, the institution's Web interface, or any other third party process. For details on processing duplicate electronic leads, refer to Process Electronic Leads. See also School Defined Fields.

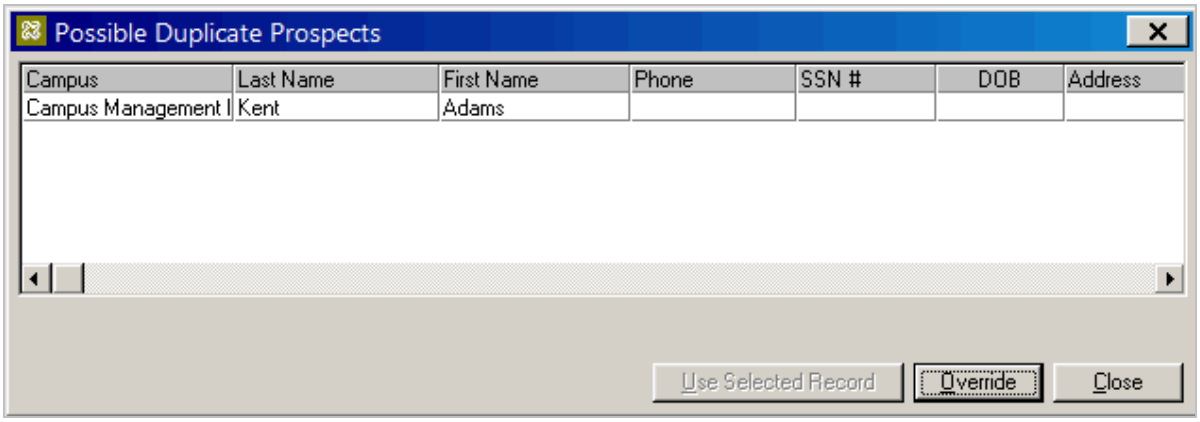
To process duplicate leads on Quick Lead and Student Master forms:

1. Navigate to the Quick Lead form (**File > Add New Lead**) or the Student Master form (**File > New Lead-Full**) and enter the new lead information.

   CampusNexus Student checks for duplicate records already on file using your institution's configuration rules. If possible duplicates are found, a list of student records matched to the new lead entered is displayed on the Possible Duplicate Prospects form. This feature is set up in the Admissions Settings form (Setup > Admissions > General tab > Duplicate Name/Phone).

   Note: If duplicate lead checking is enabled (Yes), CampusNexus Student displays possible duplicates as soon as you press Tab after entering a name, phone number, or email address that exists in another record in the CampusNexus Student database. If you are working with a large database, we recommend that you set this flag to No, so that the search for duplicates is not performed on each field as you enter data.

   - If this flag is set to Yes, the following form is displayed each time the system detects a possible duplicate.
   - If set to No, the duplicate search criteria is executed when you save the New Lead.



2. Select one of the possible duplicate records and click **Use Selected Record** to save the data on this record to the Student Master for the selected student.

   - OR -

   Click **Override** to populate a new Student Master with data from the New Lead. When you click Override, CampusNexus Student returns to the Quick Lead form.

   Data fields to be updated are set up in the Duplicate Lead Process Configuration. Override is available only if you have been given override permission (on the Duplicate Processing tab of the Duplicate Lead Process Criteria Selection form).

   A new Inquiry record may or may not be added.

3. Click **Save**. The Possible Duplicates form is displayed. Click **Cancel** to return to the previous form.

4. Click **Save New** to have the New Lead record result in a separate record to be created. This option is available only if you have override permission.

   If you do not have override permission, the Save New button is unavailable. Without override permission, you can process the New Lead as a duplicate, but cannot create a new Student Master for the New Lead.

5. Click **Process Duplicate** if you have determined that the New Lead record being entered is a duplicate of the lead record selected from the possible duplicates list.

   The following occurs when you click Process Duplicate:

   - Data entered in the new lead record for the user-defined fields is updated to the existing record if a configured field list is found for a status category that matches the status category of the school status on the existing record.
   - Data that is modified in the existing lead record is written to the Student Master audit table.
   - If the existing student record has a school status in the Lead system category and the Admissions rep assigned to the lead is Inactive, you are prompted to reassign the existing lead record to an Active Admissions rep.
   - If an activity is configured, that activity is scheduled for the selected lead record and assigned to that lead's admissions rep.

   When a duplicate student record is found and you click Process Duplicate, data from the new lead record is only updated to the existing record if the fields are specified in the configuration and the field in the new lead record contains data. A field in the existing lead record that contains data is not overwritten with a blank value from the new lead record. For details on setting up school-defined rules for duplicate processing, refer to Duplicate Lead Process Configuration.

6. Click **View Student** to see the Student Master for this student.

School Defined Fields

Clients may send School Defined Fields to the Process Electronic Leads process. This allows institutions to configure how this information is imported following the Duplicate Leads Processing procedures set up on the campus level.

To configure the import of School Defined Fields when processing electronic leads:

1. Navigate to **Setup** > **Campus Locations** > select a campus > **Add/Edit** (button) > **Allow...** (tab).
2. Click the **Duplicate Lead Process Configuration** button. The Duplicate Lead Process Criteria Selection form is displayed.
3. Click the **Duplicate Processing** tab.
4. In the Fields list, select **School Defined Fields** to allow school defined fields to be overwritten or discarded depending on the current student master's status category field.

Configuring Duplicate Lead Processing Rules

Authorized users can configure rules for the steps CampusNexus Student takes when a New Lead is identified as a duplicate of an existing record. Rules specify which data fields on an existing student record are updated from information on the New Lead form when that new lead is processed as a duplicate. You can also configure a Contact Manager activity that is triggered after a duplicate lead has been processed.

The permission to override a duplicate and create a new record can be given to select staff groups who can add a new staff group or edit an existing one and specify the override permission for the selected group. A member of the staff group with this permission can override the new lead record being entered and block it from being processed as a duplicate thereby allowing a new lead record to be created.

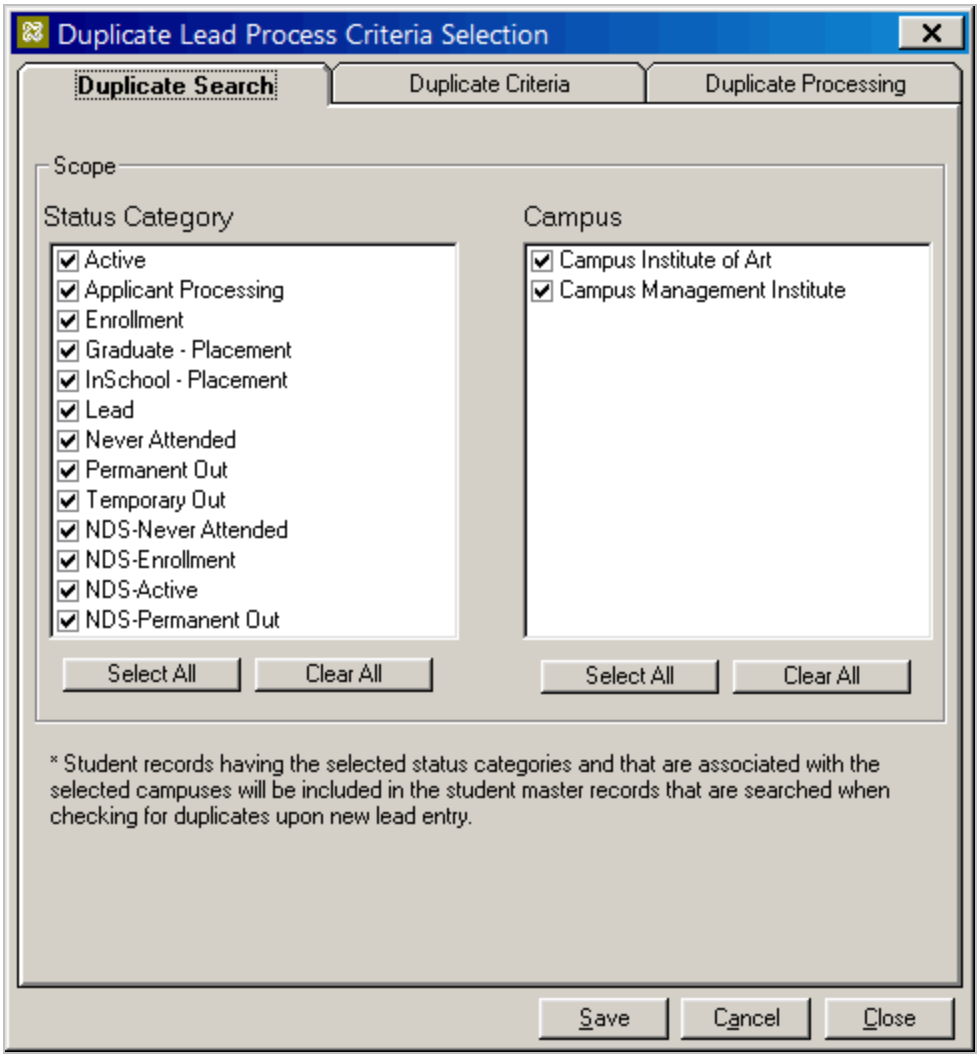
Once Duplicate Lead Process Criteria have been set up, duplicate checking may be performed within any of the following CampusNexus Student processes:

- Student Master (Add or Edit)
- Quick Lead Entry
- Process Electronic Leads
- Process On-Line Applicants

Note: To create a new group or add members to an existing group, see Add a Staff Group (Setup > Staff > Staff Groups > Add a Staff Group)

To configure duplicate lead processing rules:

1. Navigate to **Setup** > **Campus Locations** > select a campus > **Add/Edit** (button) > **Allow...** (tab).
2. Click **Duplicate Lead Process Configuration**. The Duplicate Lead Process Criteria Selection form is displayed.



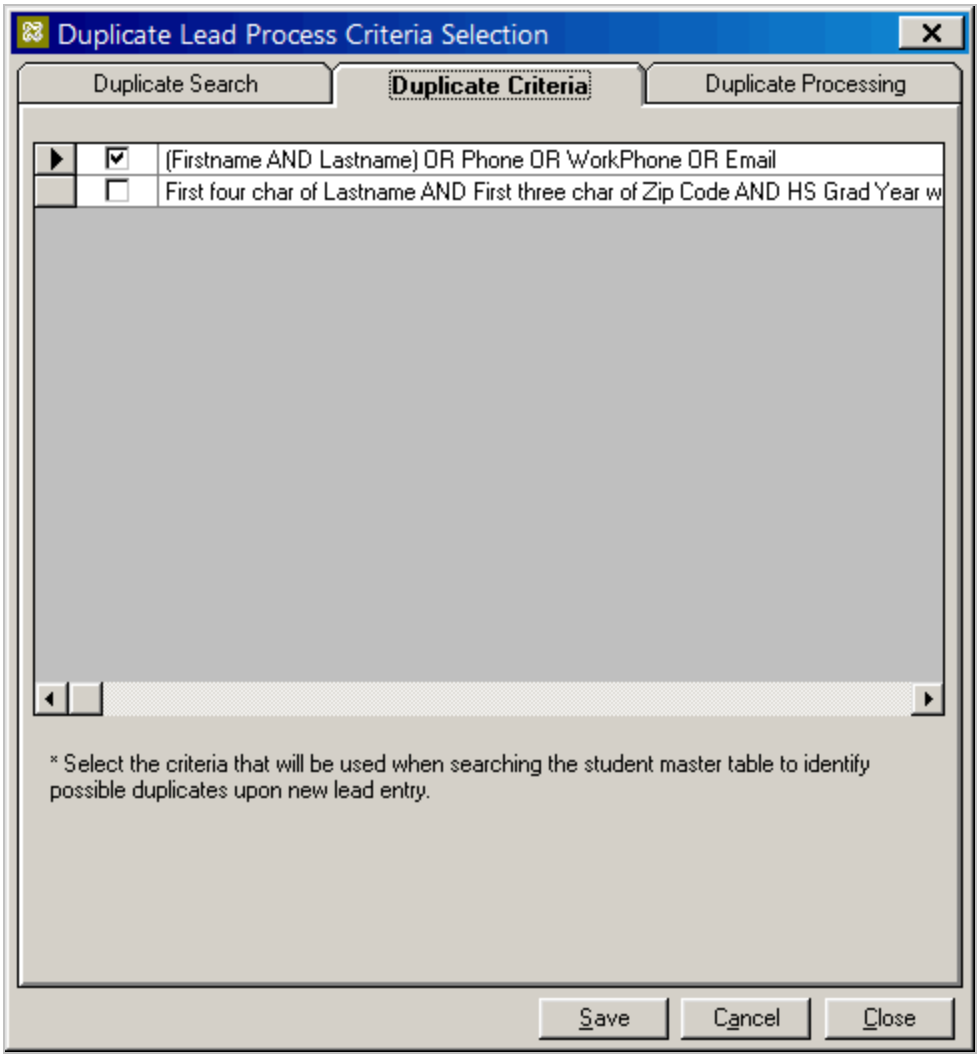
3. On the Duplicate Search tab, select the **Status Category** and **Campus** to be searched during the process of gathering duplicates. You can select or clear all categories and campuses at once, then add/clear them one-by-one as required.

   Use the Status Category list to specify the system status categories to be included in the duplicate search. The status categories pertain to the fields that will be updated from a New Lead record to the existing record when a duplicate student record is found.

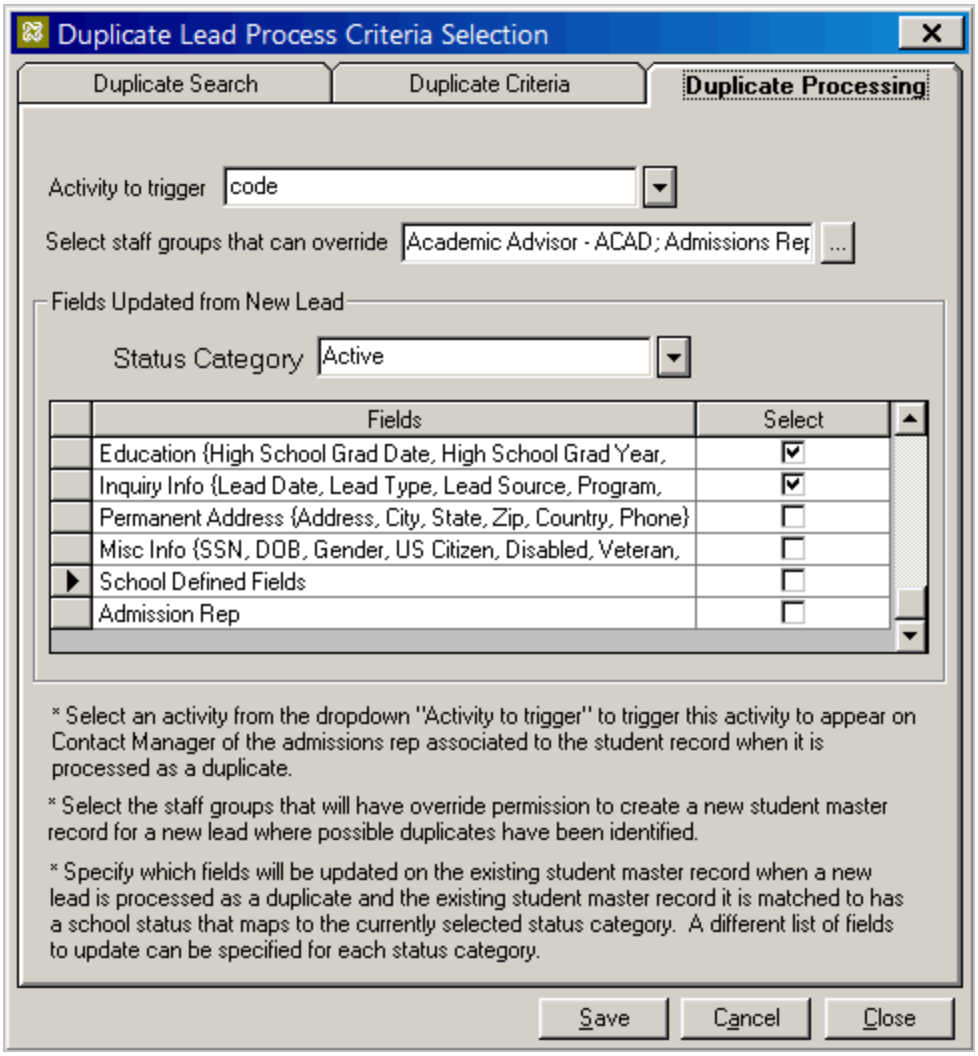
   In the Campus section select the campuses to be included in the duplicate search when a lead is entered for the currently selected campus.

4. Click **Save**.

5. Click the **Duplicate Criteria** tab and select the criteria to be used when searching the Student Master table to identify possible duplicates when new leads are entered. You can select fields and combinations of fields that will constitute a duplicate if a new lead record is matched to an existing student record using these fields. The fields selected will be updated from the new lead record to the existing record when a duplicate student record is found.



6. Click **Save**.
7. Click the **Duplicate Processing** tab to do the following:
    - Select an activity from the **Activity to Trigger** list. This activity is triggered and assigned to the admissions representative associated with the student record that is processed as a duplicate.
    - Use the Search tool in the **Select the staff groups that can override** list to assign permission to create a new Student Master record for a new lead when possible duplicates have been identified.
    - Select a **Status Category** and specify which fields shall be updated on the existing student record when a New Lead is processed as a duplicate and the existing Student Master to which it is matched has a school status that maps to this status category. A different list of fields to update can be specified for each status category.



Notes:

- When a duplicate lead record is detected and the 'Misc Info' check box is selected from the 'Fields' in the "Fields Updated from New Lead" section, any previously recorded 'Ethnic Group' category information is replaced with the new 'Ethnic Group' category information.
- The 'Process Electronic Leads' form processes 'Ethnic Group' information only when the 'Misc Info' check box configuration is selected.

8. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

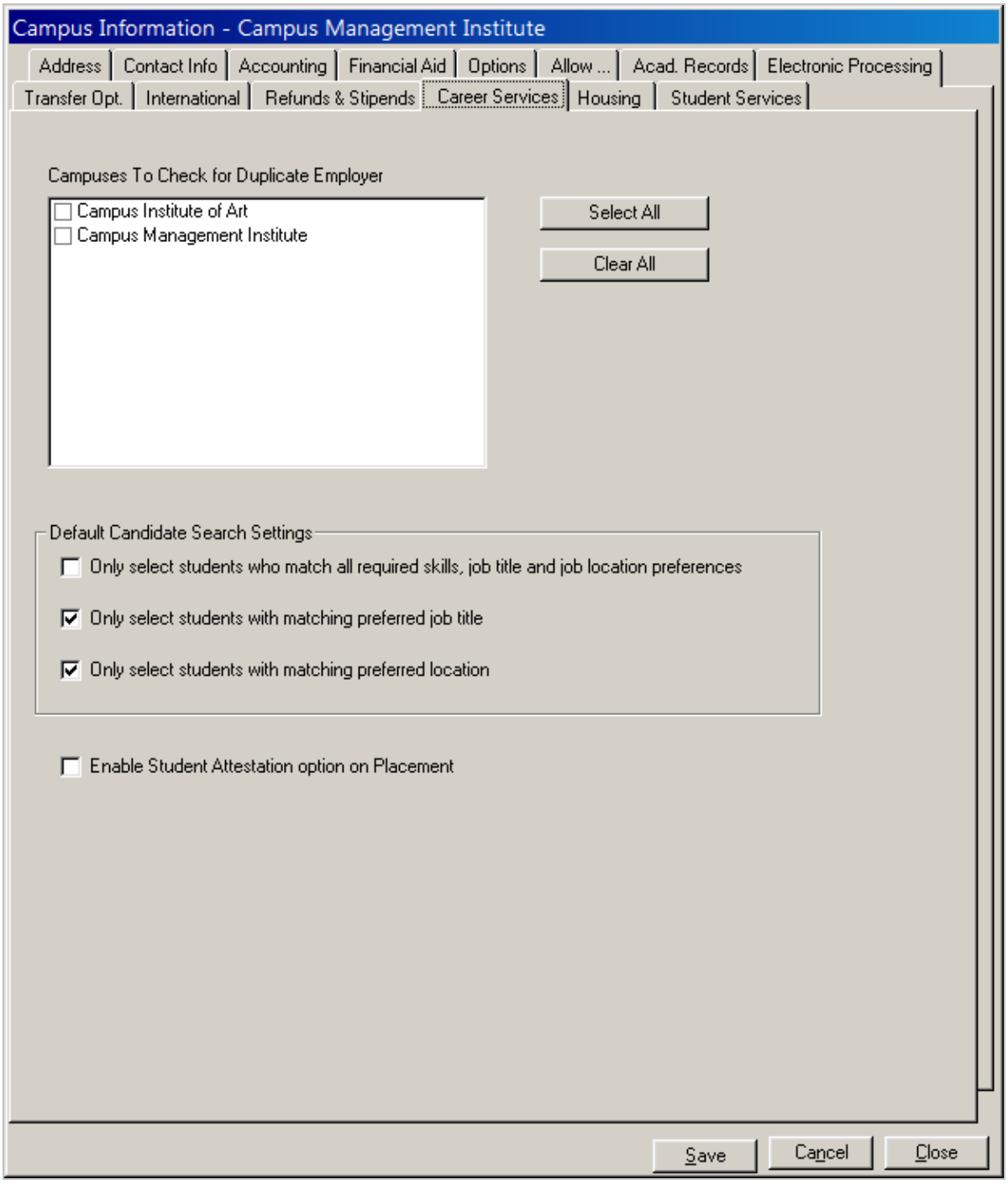
Note: When you edit a campus, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.

Campus Information - Career Service Tab

Use Career Services tab of the Campus Information form to set up campuses to check for duplicate employers and to specify default candidate search settings.

To add or edit career services options for a campus:

1. Navigate to **Setup** > **Campus Locations** > select a campus > **Add/Edit** (button) > **Career Services** (tab).



2. In the **Campus To Check for Duplicate Employer** section, select the campuses that will check for duplicate employer entries.
3. In the **Default Candidate Search Settings** section, select appropriate options to only return those students that match the criteria selected when searching for a job candidate. If no selection is made, any student that matches any of the criteria is included in the list.

   Note: The value selected here is also displayed in Step 2 of the Job Candidate Search wizard.
4. Select **Enable Student Attestation option on Placement** for this option to appear in the Placement wizard. The option will read 'Student Attestation' when the 'In Field of Study' field is enabled in the configuration setup and the campus level configuration for Student Attestation is enabled.

   Note: When editing a placement, if either of the above configurations is disabled, Student Attestation does not appear as an option in the Field of Study field, unless Student Attestation is selected as 'In Field of Study' in the existing placement record.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

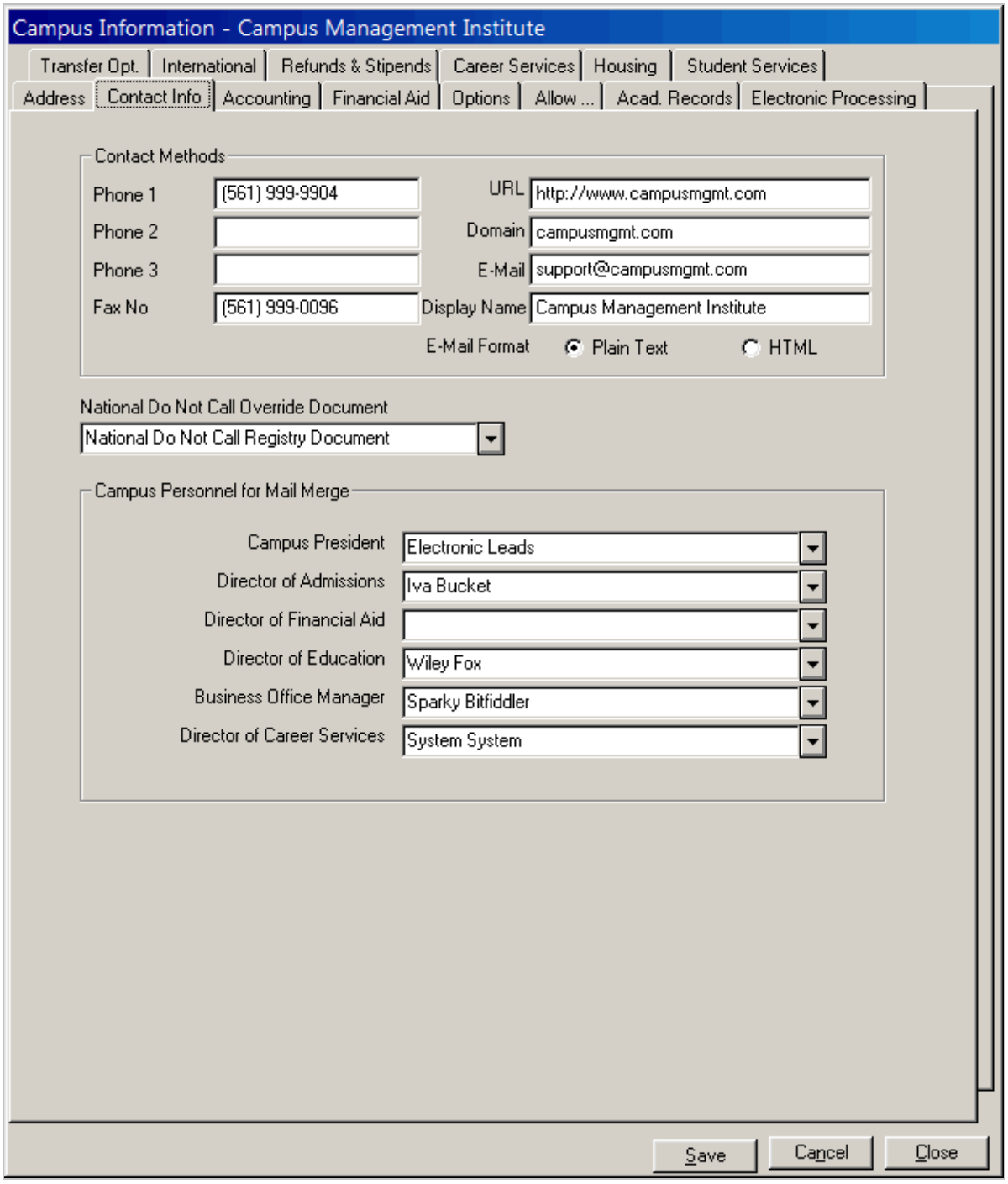
Note: When you edit a campus, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.

Campus Information - Contact Info Tab

Use the Contact Info tab of the Campus Information form to set up telephone and fax numbers, Internet address data, a campus e-mail address and e-mail format, and to select campus personnel for mail merge tasks.

To add or edit contact information for a campus:

1. Navigate to **Setup** > **Campus Locations** > select a campus > **Add/Edit** (button) > **Contact Info** (tab).



2. Specify appropriate options. For more information, see Field Descriptions.
3. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Note: When you edit a campus, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.

Field Descriptions

Field	Description
Phone 1, Phone 2, Phone 3	Specify up to three telephone numbers for the campus.
Fax No	Specify the Fax number for the campus.
URL	Specify the URL for the campus website.
Domain	Specify the domain name of the campus website.
E-Mail	Specify the default e-mail address for the campus.
Display Name	Specify the display name of the campus on the website.
E-Mail Format	Select a formatting option for campus e-mails. The options are Plain Text and HTML.
National Do Not Call Override Document	Select the document that provides permission to override a Do Not Call listing.
Campus Personnel for Mail Merge	Select up to six contacts to be used in automated mail merge fields. The options are: • Campus President • Director of Admissions • Director of Financial Aid • Director of Education • Business Office Manager • Director of Career Services

Campus Information - Electronic Processing Tab

Use the Electronic Processing tab of the Campus Information form to configure CampusNexus Student for electronic payment processing and to set up the necessary account details. Electronic processing allows students to post payments to their accounts, make scheduled payments, make admission deposits, and submit admission fees from a web page using a third party vendor or merchant account. A VeriSign account is required for electronic payment processing.

VeriSign Requirements

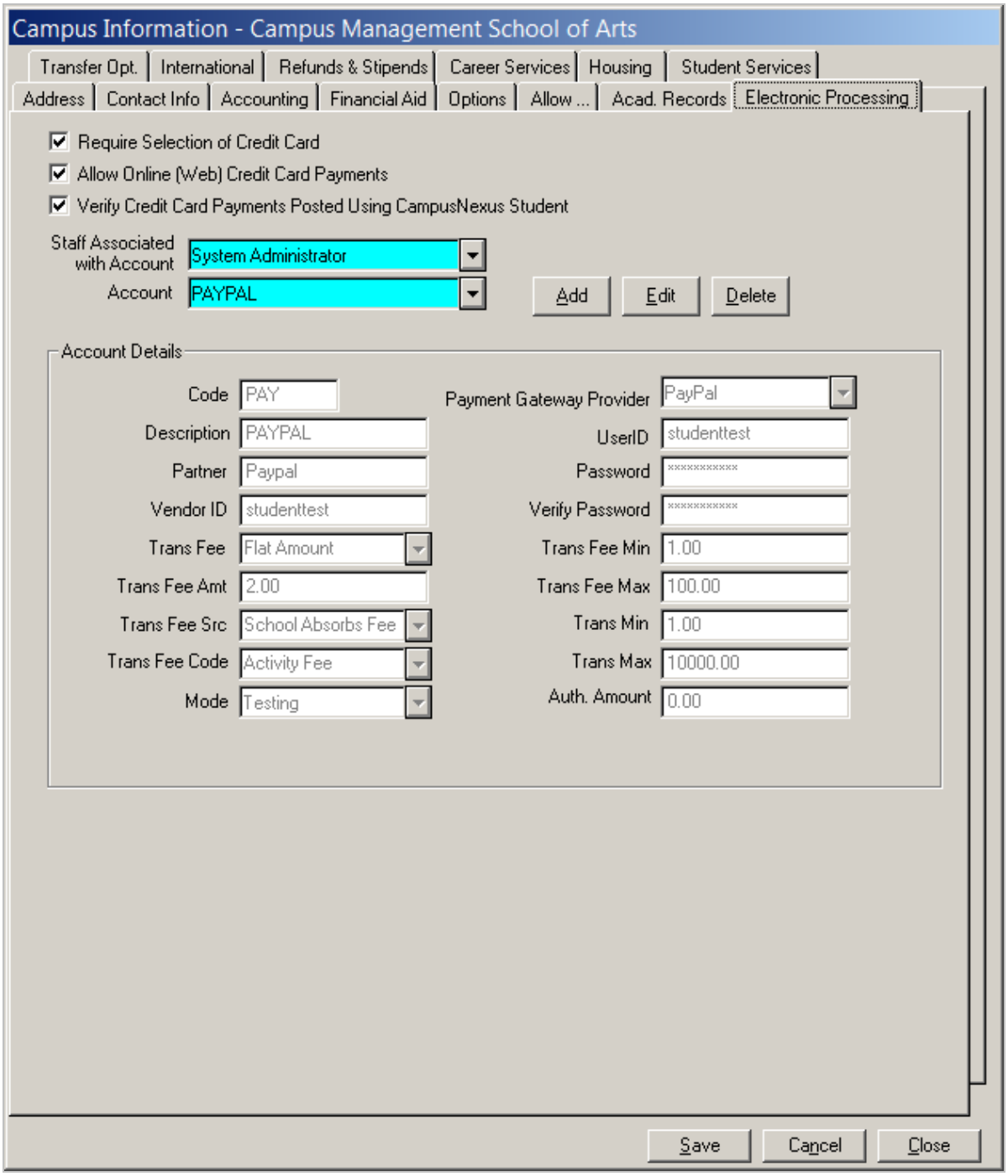
- Each institution needs to create a merchant account. If a merchant account is already established, contact the merchant bank to confirm that it allows online transactions.
- The Online Application is completed with VeriSign supplying the Merchant Information.
- An SSL Certificate must be purchased from VeriSign. A dedicated Web Server Site must be created with a public IP allowing for the SSL Certificate to be installed.
- Payflow Pro must be purchased from VeriSign. The client must be installed on the Web server, allowing for the secure connection between the Web Server and VeriSign.
- The account information supplied by VeriSign must be added to the campus setup for each campus in CampusNexus Student. (If all campuses use a single account, select that one account.) Refer to the procedure to set up electronic processing.
- Allow Online (Web) Credit Card Payments must be selected on the Campus Information > Electronic Processing tab.

For additional information regarding VeriSign, see:

- Process Electronic Drafts
- Student Accounts: Additional Tab Settings .

To add or edit electronic processing options for a campus:

1. Navigate to **Setup** > **Campus Locations** > select a campus > **Add/Edit** (button) > **Electronic Processing** (tab).



2. Specify appropriate options. For more information, see Field Descriptions.
3. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Note: When you edit a campus, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.

Field Descriptions

Field	Description
Require Selection of Credit Card	Select this option if a credit card selection is required.
Allow Online (Web) Credit Card Payments	Select this option to allow online payments for this campus.
Verify Credit Card Payments Posted Using CampusNexus Student	Select this option to have VeriSign validate credit card transactions before they are posted to the students' Ledger Cards.
Staff Member Associated with Account	Select the staff person assigned to web transactions from the drop-down list. You can only select staff members with an email address on file.
Account	Select the account from the drop-down list.
Click **Add** or **Edit** to enable the following fields.	
Code	Specify a code for the account.
Description	Specify a descriptive name for the account .
Partner	Specify the Partner value assigned by VeriSign.
VendorID	Specify the VendorID value assigned by VeriSign.
Trans Fee	Assign a transaction fee to be a percentage of the payment or a flat amount.
Trans Fee Amt	Based on how you set up the transaction fee, select the transaction fee amount to be an amount or a percentage.
Trans Fee Src	Assign the fee source to come from the student or the institution.
Trans Fee Code	Assign a transaction fee code for tracking purposes.
Mode	Set the mode to Live if you are sending real data, otherwise select Testing to send dummy data using a test account.
Payment Gateway Provider	Specify the Payment Gateway Provider: PayPal or ACI. **Note**: If ACI is selected, the **Vendor** field is changed to **Division Business ID**. Also, the **Partner** field is not applicable for ACI. Anthology Inc. products support only the “Funding Portal” product from ACI.
UserID	Specify the UserID assigned by VeriSign.
Password	Specify the Password assigned by VeriSign.
Verify Password	The field is used to verify that the password entered matches the password assigned by VeriSign.
Trans Min Fee	Assign a minimum transaction fee for each transaction.

Field	Description
Trans Max Fee	Assign a maximum transaction fee for each transaction.
Trans Min	Assign a minimum transaction amount.
Trans Max	Assign a maximum transaction amount .
Auth. Amount	Specify the amount being used to authorize the credit card when adding a new credit card. Some credit card processors do not allow authorization amount of $0. This amount can be changed based on the processor's requirement if needed.

Online Student Payment Process

1. The student visits the CampusNexus Student web interface and logs in with user name and password.
2. The student selects the "Online Payment" option from the Financial Information tab.
3. If a Scheduled Payment Plan exists for the student, the student can select/view a scheduled payment to which the transaction applies.
4. If credit card information is already on file, the student can use that account or create a new account.
5. When the form is completed, a confirmation is displayed. The amount being transferred plus any transaction fees charged by the institution are displayed. If the information is correct, the student submits the payment.
6. A confirmation displays the accepted payment or a reason for a rejected payment.
7. The student prints a receipt of the payment or views the ledger card which shows the updated payment information.

Campus Information - Financial Aid Tab

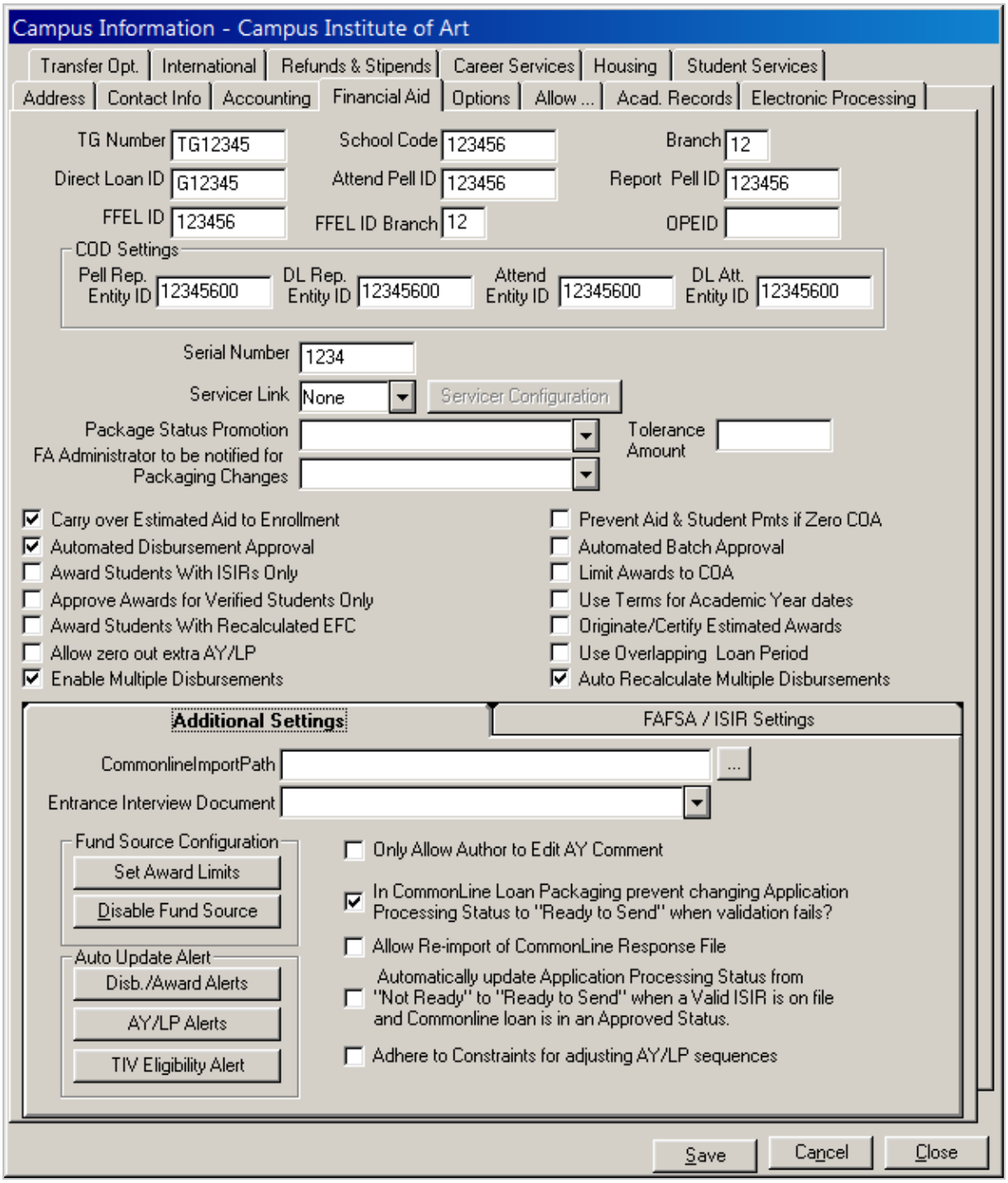
Use the Financial Aid tab of the Campus Information form to set up campus-related financial aid information necessary for working with the Department of Education (ED) and its divisions and branches. This form also enables administrators to set parameters related to the third-party Direct Loan tab. Additional financial aid information is required on the COD Grants tab.

See Locking Academic Year/Loan Period Awards for instructions to lock AY/LP awards.

To add or edit financial aid information for a campus:

1. Navigate to **Setup** > **Campus Locations** > select a campus > **Add/Edit** (button) > **Financial Aid** (tab).

   This tab contains identification codes that may have been assigned to your school by divisions of the U.S. Department of Education. They are required if your school participates in Title IV student financial aid programs.



2. Specify the **TG Number** (SAIG mailbox; destination point) that identifies this campus to the Department of Education (TG followed by 5 alphanumeric characters).
3. Specify the **School Code** for this campus (6 characters). The school code is the Federal School Code listed on the school's ECAR (Eligibility and Certification Approval Report); also called the Pell ID.
4. Specify the Department of Education **Branch** code if this campus is a branch of another school.
5. Specify the **Direct Loan ID** used by this campus for processing Direct Loans with Common Origination and

Disbursement (COD). This field contains six characters and begins with a G or E.

6. Specify the **Attend Pell ID** that is used when processing Pell grants for students who are attending this campus. The Attend Pell ID is also used on ISIRs. This campus could also be part of a larger organization that uses the Report Pell ID. Attend Pell IDs may not be changed without updating all students who had the original Attend Pell ID in CampusNexus Student.

   When you try to modify a campus's Attend Pell ID, CampusNexus Student checks if the following conditions are met:

   a. There are no Originated Pell Awards for students at the selected campus. CampusNexus Student checks if there are any students who have an Originated Pell Award with a status of 'Accepted' or 'Batched to Send' for the campus under the original Attend Pell ID. These values appear in the 'Origination Status' field of the Pell Grant form.

   b. There are no ISIRs that were matched to students at the selected campus that are associated with the Attend Pell ID. If the campus' Attend Pell ID was not already the same as the First College Choice or Pell ID, and there are ISIRs that were matched to a student at this campus using the Attend Pell ID's value, CampusNexus Student does not allow the Attend Pell ID for that campus to be changed, since the system would try to match the ISIR with an Attend Pell ID that no longer exists.

   If the conditions are met, the Attend Pell ID is updated. In addition, the student's Attend Pell ID is updated with the new Attend Pell ID on the student's campus' Pell tracking record. This ensures that the student's previous Pell award information is associated with the new Attend Pell ID for the student's campus.

   Informational messages specific to the condition above that were not met are displayed.

   The business logic behind this validation for the Attend Pell ID is as follows:

   a. If Pell Awards were successfully originated using the campus' Attend Pell ID and were accepted by COD, it is likely that the Attend Pell ID is correct, and therefore should not be changed.

   b. If ISIRs were imported and matched to a student at the campus and the Attend Pell ID matched on the ISIR College Choices that came from CPS, it is likely that the Attend Pell ID is correct, and therefore should not change.

7. Specify the **Report Pell ID** of the campus or organization that is reporting Pell Grant activity for this campus. This ID could be used by several campuses if they are organized under one corporate identity. It is possible that Attend Pell ID and Report Pell ID are the same.

8. Specify appropriate values in the **FFEL ID** and **FFEL ID Branch** fields. This information is populated in the Source School ID field .

9. Specify the **OPEID** only if the 8-digit OPEID for your institution is different from the 6-digit School Code appended with the 2-digit Branch.

   If you specify an OPEID # for a campus, it should only be populated with an 8 digit number.

   For the specific processes that utilize the OPEID field, please access Regulatory Help.

10. *COD Settings:* Define the **Pell Reporting Entity ID** for each campus participating as a full participant.

11. *COD Settings:* Define the **DL Rep. Entity ID** (Direct Loan Reporting Entity ID) for each campus participating as a full participant.

12. *COD Settings:* Define the **Att Entity ID** {Attend Entity ID} for each campus participating as a full participant.

13. *COD Settings:* Define the **DL Att. Entity ID** {Direct Loan Attend Entity ID} for each campus participating as a full

participant.

14. The **Serial Number** is used in the Financial Aid General Ledger system. SEOG, FWS, and Perkins authorization levels are assigned to the "Campus-Based Serial Number". This is a 6-digit number that is assigned by ED. An organization can have one or many campuses assigned to the same serial number. The authorization comes from ED under the serial number. When posting to CampusNexus Student, the institution can post the entire authorization amount to the serial number, or it can split the amount and post individual amounts to each campus within the serial number. This number is also used in the FISAP process to gather data for specific campuses.
15. The **Servicer Link** is used when a school has an arrangement with Global Financial Services, Inc. to process financial aid records for your students. In that case, select **Global** from the list. If not, select **Other** or **None**.
16. Click **Servicer Configuration** if you process financial aid through a third-party servicer such as Global. See Servicer Configuration for more information.
17. Select a **Package Status Promotion** code. The value is saved to SyCampus.FaPackStatusPromoID. The list of available methods is from the FaPackStatusPromo table, which is maintained at Lists > Financial Aid > Packaging Status Promotion. To remove the code from this field, click on the field and press **Delete**.
18. Select the **FA Administrator to be notified for Packaging Changes**. CampusNexus Student assigns a review activity to this person for each packaging change.
19. Specify a **Tolerance Amount** to be set for the packaging status promotion to handle any small differences - such as bank fees or disbursement schedule changes - that might occur in the student's award that would cause the student to fall out of the promoted packaging status.

    The Packaging Status Promotion process applies the tolerance to the four packaging status promotion attributes:

    - Aid > COA
    - Aid > Inst Costs
    - Approved > COA
    - Approved > Inst Costs

    The RBS tolerance level can be configured in the Tolerance Amount field on the Financial Aid tab on the Campus Information form. The maximum tolerance limit is $1000. If the Tolerance Amount field is zero or remains blank, no tolerance is applied.
20. Select **Carry over Estimated Aid to Enrollment** for CampusNexus Student to handle this process or leave the check box cleared if you want to do this manually. For more information see Financial Aid Estimates.
21. Select **Automated Disbursement Approval** to specify that the campus uses the auto approval feature when approving disbursements to pay.
22. Select **Award Students With ISIRs Only** to prevent awarding to students without ISIRs. This ensures compliance with Title IV regulations. Once this feature is set up, the user may award non-Title IV aid to the student without an ISIR, but is prevented from awarding fund sources that have a fund source type of Title IV. The Title IV indicator on the Fund Source Setup (Lists > Financial Aid > Fund Source) is used to define which fund sources meet the Title IV designation for packaging.
23. Select **Approve Awards for Verified Students Only** to restrict users from saving the students award status to *Approved* when their verification status is *Selected, Not Verified*.

    If you select this option, the *Approved* status is available in the menu when adding/editing a fund source; however, an informational message is displayed stating that the verification status of *Verified* is required before CampusNexus Student saves the student's award status as *Approved*.

If the fund source is a PLUS loan, you can save the student's award status to *Approved* in the *New Source of Aid* form. For more information, see New Source of Aid.

24. Select **Award Students With Recalculated EFC** to provide estimated financial aid packages after the EFC (Expected Family Contribution) has been changed, but before a new ISIR (Institutional Student Information Record) has been received. This allows you to provide prospective students with accurate packaging information while waiting for the corrected ISIR from the Central Processing System.

25. Select **Allow zero out extra AY/LP** to allow CampusNexus Student to adjust a packaged academic year (AY) and loan period (LP) when "Course work to reduce AY/LP's" is enabled. With this check box enabled, credits or hours and weeks can be adjusted to zero even when it cannot be removed due to packaged aid, comments, or applied locks. CampusNexus Student can then adjust prior sequence credits or hours and weeks as more "Course work to reduce AY/LP's" is entered.

    This setting can work in conjunction with the "Do not adjust AY/LP if award is fully disbursed" setting. With that setting enabled, CampusNexus Student stops adjusting AY/LP sequences with a sequence that contains a fully disbursed award.

    Course work to reduce AY/LP's" are approved Transfer Credits, CLEP courses, associated courses, and course work prior to the version start date (if null Exp. Start Date).

    The Student Pace Evaluation (SPE) tool checks the "Allow zero out extra AY/LP" setting when adjusting AY/LP. For example, if PP2 has a disbursement, and "Allow zero out extra AY/LP" is selected, SPE sets PP2 to zero. If the option is not selected, CampusNexus Student notifies the user that the AY/LP could not be adjusted.

26. Select **Enable Multiple Disbursements** to enable this feature at your campus, provided you have a CampusNexus license. Having an active CampusNexus license is essential to use CampusNexus features. If you do not have a license, you will be able to see some aspects of some features (via the user interface and Help), and you may learn what options you will gain with CampusNexus, but the screens will show clear reminders that feature activation requires the license.**Note**: Before using Multiple Disbursements features, set up the required system and campus level definition rules. See Configuring Multiple Disbursement Definitions.

27. Select **Prevent Aid & Student Pmts if Zero COA** to prevent users from awarding aid to a student for an academic year that has a Cost of Attendance (COA) of zero (0).

28. Select **Automated Batch Approval** to enable the user to auto-post approved disbursements to a new batch and set the batch status to **OK to Post**.

29. Select **Limit Awards to COA** to limit awards to COA. This prevents institutions from over-awarding. CampusNexus Student prevents the creation of a student payment plan when the COA is zero.

    When creating student payment plans, internal logic defaults the academic year for each scheduled payment to the applicable academic year based on the expected date of the payment. The academic year for the payment is defaulted to the academic year record in which the expected date of the payment is within the academic year start and end date.

    Selecting this check box also allows a $300.00 tolerance above the COA only for the Federal Work Study fund source. This accommodates instances where a student has completed more work hours than anticipated and is due payment from Federal Work Study.

30. Select **Use Terms for Academic Year dates** to allow the academic start and end dates to be matched to the term start and end dates, even if holidays fall within an academic year, for term programs based on Financial Aid Terms configured in CampusNexus Student. Refer also to Enrollment, Programs, Packaging, Awards,and Applicant.

- If this check box is not selected, and the school has clock hour program versions, perpetual terms (no term with start date within 15 days of start date), or does not have the number of terms and credits configured,CampusNexus Student adds the number of weeks for the academic year sequence from the program setup to determine the dates. If there are 5 consecutive days or more of holidays in the period, the period will be added to the end date.
- If this check box is selected and the term is defined as a Financial Aid Term and associated with the student's enrollment campus, then:

    a. CampusNexus Student finds the term that has a start date that matches the student's program start date, and assigns this date to the first Academic Year start date in the sequence.

    b. Next, CampusNexus Student finds the term with a date greater than the end date of the term but closest to that date and considers it the next term that is part of the academic year. This step is repeated until the number of terms considered part of the academic year is equal to the total number of terms in an academic year.

    c. Once the final term of the academic year is determined, the end date of that term will be the academic year-end date.

    If the student's program of study is greater than one academic year, the start date for the subsequent academic year will be the next term with a date greater than the previous academic year-end date but closest to that date, for the student's entire program of study.

    Note: Only Financial Aid Terms will be considered for these date calculations.

Note: If the **Total Number of Terms in an Academic Year** has not been defined on the Financial Aid Program Version for the program in which a student is enrolled, date calculations will reflect calculation formulas as if the check box was cleared (not selected).

Note: Program transfers and the existence of transfer credits processes will be taken into consideration since these credits may result in a student completing a program in fewer terms than the total number of terms defined for the student's program of study. Under these circumstances, the average number of credits taken in a term is calculated, and if a student's transfer credits exceed the number of credits in a term, the academic year is reduced by the term. The steps are repeated until the accurate number of terms that the transfer student will attend is determined, and the transfer credits are deducted from the end of the program. See also Transfer Enrollment for additional information.

31. Select **Originate/Certify Estimated Awards** to enable the Award Status of an award to be ignored when determining if the award's Origination Status or Application Processing Status can be updated to 'R' (Ready to Send).

    If this check box is selected, awards for Title IV Aid may be certified even though the Award Status is 'Estimated'. When a Pell, ACG, SMART, or Direct Loan has an Award Status of 'E' (Estimated), 'P' (Pending), or 'A' (Approved), and has award amounts and disbursement information entered, its Origination Status may be set to 'R' (Ready to Send).

    If a Subsidized Stafford, Unsubsidized Stafford, PLUS or ALT Loan has an Award Status of 'E' (Estimated), 'P' (Pending), or 'A' (Approved), and contains award amounts and disbursement information, its Application Processing Status may be set to 'R' (Ready to Send.

    In addition, if **Originate/Certify Estimated Awards** is selected and the **Automatically update Pell Origination Status to Ready to Send?** flag (Setup > Financial Aid > Pell) is enabled, the Origination Status will be converted to an 'R' if the Award Status is not equal to 'C' (Cancel) when an ISIR is imported or during the ISIR Matching process.

When manually updating a Pell award, when **Originate/Certify Estimated Awards** is not selected, regardless of how the **Automatically update Pell Origination Status to Ready to Send?** flag is set, if the Origination Status is set to 'Ready to Send' and the Pell Award Status is updated to 'E' (Estimated), or 'P' (Pending), the message "Origination Status cannot be 'Ready to Send' until the Pell Grant Status 'Approved' is displayed" when an attempt is made to save the award.

32. Select **Use Overlapping Loan Period** to create a stub loan period if the student has an overlapping loan period. If this option is not selected, CampusNexus Student does not consider the overlapping loan period and loan periods are created without a stub loan period.

    Note: This option also controls the packaging logic. If this option is selected, CampusNexus Student always considers the loan amounts received in the overlapping loan period during packaging for the first loan period (regardless of whether the first loan period is a stub loan period). If this option is not selected,CampusNexus Student ignores any amount received in the overlapping loan period during packaging.

    For more information regarding the stub loan period and overlapping loans, refer to Packaging for Overlapping Loans.

33. Select **Auto Recalculate Multiple Disbursements** to enable this feature at your campus.

Additional Settings Tab

34. Click and select the **CommonLineImportPath** directory.

35. Select the **Entrance Interview Document**. When the document has been added to the student's document folder and the document status code is "OK", "REC", "RECVD", "RECEIVED", "REC'VD", or "A" and is associated with an "Approved/On file" status, the entrance interview date in the Academic Year form is set to the date that the document was received.

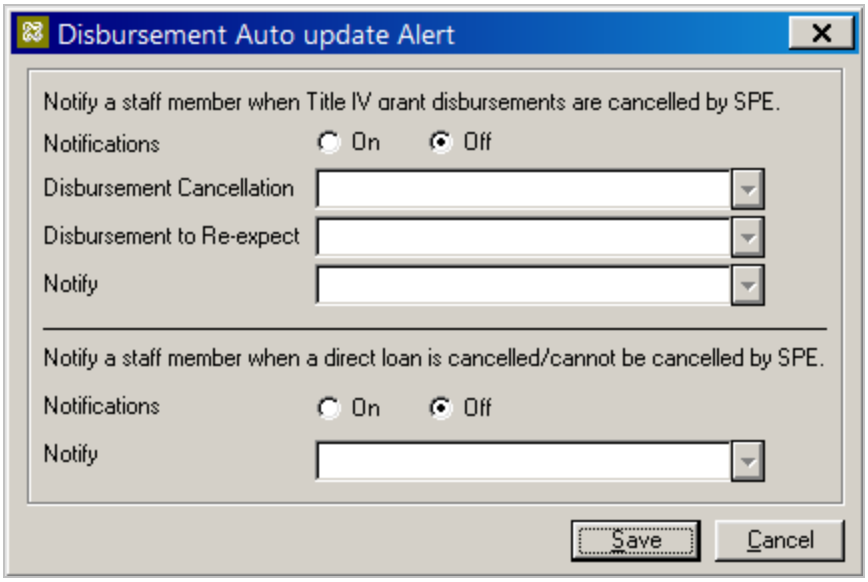
36. *Fund Source Configuration:* Click **Set Award Limits** and choose the Award Selection Criteria (academic year and fund sources).

37. *Fund Source Configuration:* Click **Disable Fund Source** to deactivate a fund source by award year.

38. *Auto Update Alert:* Click **Disb./Award Alerts** to set up notifications for the following incidents:

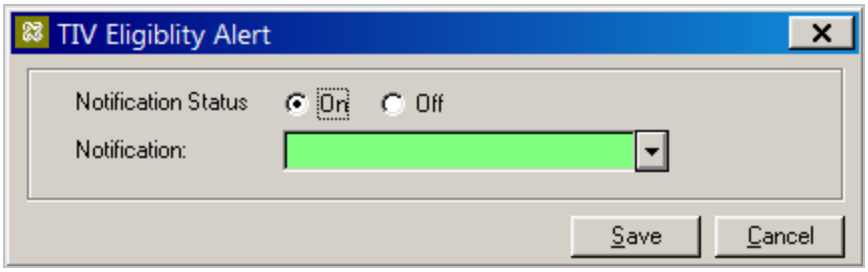
    - Title IV grant disbursements are cancelled by SPE. When the payment period start date of a Title IV grant disbursement is moved beyond the Award Year's end date by the SPE, the disbursement is cancelled and activities can be configured to notify the appropriate staff member of the cancellation. For more information, see Student Pace Evaluation (SPE) and Activities Codes.
    - A direct loan is cancelled or cannot be cancelled by SPE. This form allows you to specify the appropriate staff member to notify when the loan is cancelled or cannot be cancelled by the SPE due to invalid BBAY dates. For more information, see Direct Loan Setup and Student Pace Evaluation (SPE).

    The default setting for the alerts is **Off**. To enable notifications, change the setting to **On** and select the staff member to be notified.



39. *Auto Update Alert:* Click **AY/LP Alerts** to set up AY/LP notifications for a user.

40. *Auto Update Alert:* Click **TIV Eligibility Alert** to set up Title IV Eligibility notifications for a user. The default setting for the alert is **Off**. To enable notifications, change the setting to **On** and select the staff member to be notified. For more information, see Academic Year Form, Loan Periods, and Student Pace Evaluation (SPE).



41. Select **Only Allow Author to Edit AY Comment** if applicable.

42. Select **In CommonLine Loan Packaging prevent changing Application Processing Status to "Ready to Send" when validation fails?** if applicable.

43. Select **Allow Re-import of CommonLine Response File** if applicable.

44. If applicable, select **Automatically update Application Processing Status from "Not Ready" to "Ready to Send" when a Valid ISIR is on file and CommonLine loan is in an Approved Status.**

45. Select **Adhere to Constraints for adjusting AY/LP sequences** to prevent the final Academic Year / Loan Period Evaluation logic from over adjusting or deleting Academic Year (AY) and Payment Period (PP) data for enrollments using non-term program versions. In all of the documented scenarios below, the elements are eligible to have date adjustments performed by the SPE should a student fail to progress during their final AY/LP

    a. When the following conditions are met, the AY/LP and associated payment period weeks and hours or credits are eligible to be automatically adjusted by the system; however, none of the values will be adjusted to 0:

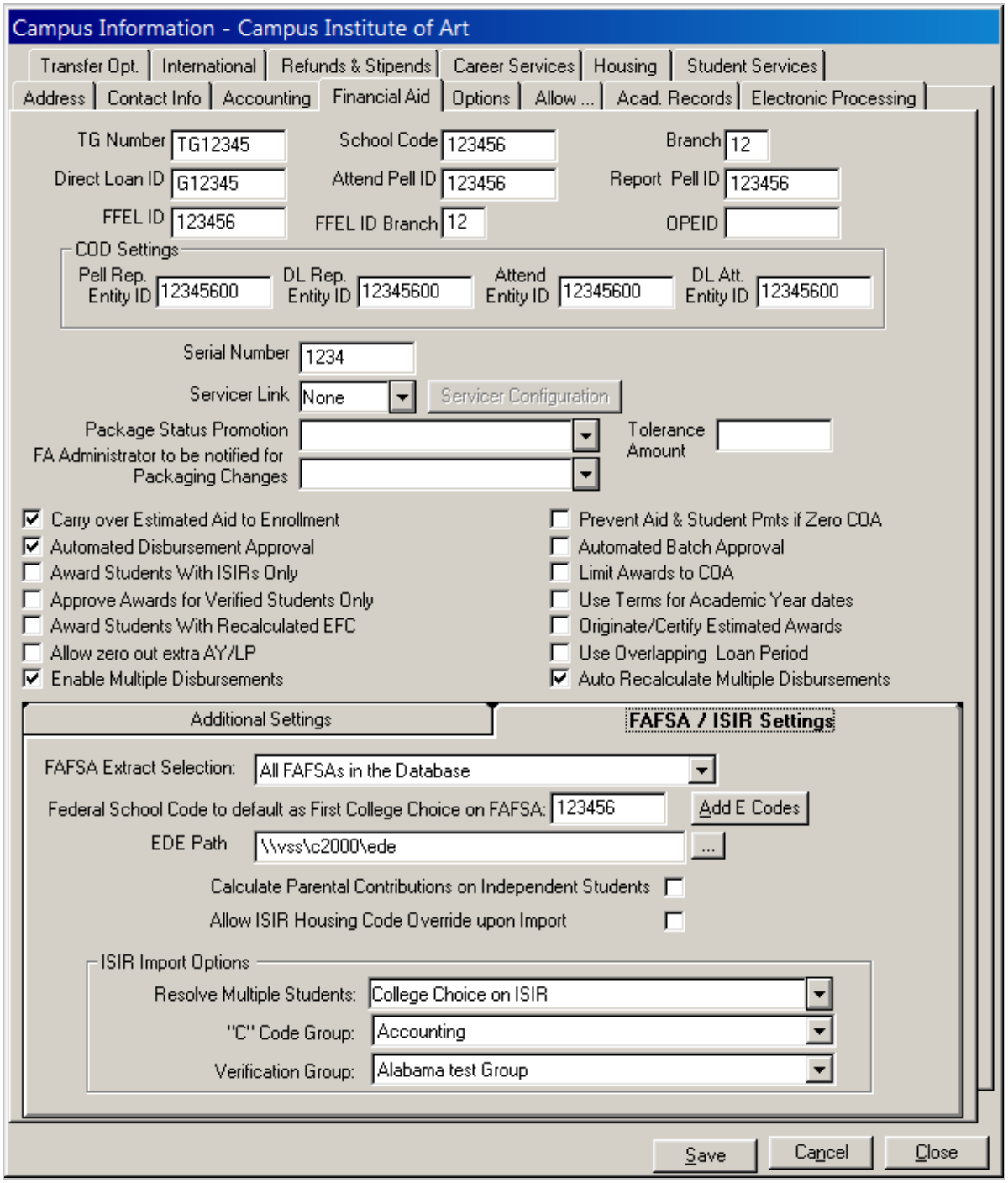
        - A single disbursement has been posted to the AY, but the AY is not fully disbursed.
        - A ledger transaction has been posted because attendance was posted in the PP.
        - Active courses are on student schedules associated with a PP in the AY.

b. When an award, excluding payment plans or agency payment plans, for a final AY/LP is fully disbursed, the weeks and hours or credits are not eligible to be automatically adjusted by the system.

An activity with the description *"The AY/LP definition cannot be changed due to an adjustment constraint."* is assigned to the student and staff user when one of the above conditions exists.

FAFSA/ISIR Settings Tab

46. Click the **FAFSA/ISIR Settings** tab to finish the Financial Aid configuration settings.



Note: For the latest content about FAFSA, ISIR and COD processing, access Regulatory Help.

47. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

For more information about locking AY/LP awards, see Locking Academic Year/Loan Period Awards.

Note: When you edit a campus, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.

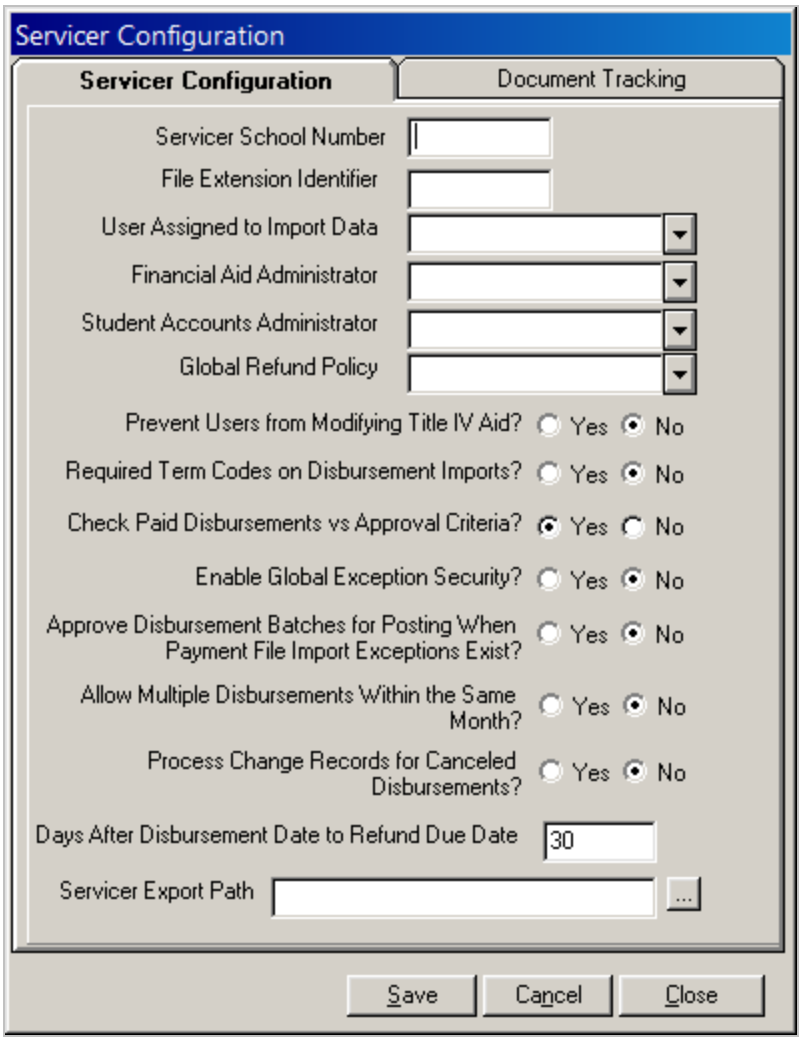
Servicer Configuration

If your institution uses Global Financial Services for processing financial aid, use this form to provide CampusNexus Student with some of the necessary setup information. If you need further details, consult Global at http://globalfas.com/

Once you have configured your Servicer correctly, CampusNexus Student updates the student's document list when an SD file is imported from Global. The student's Document Folder has a current record of the status of each document required by Global for Title IV.

To enter the data for Global:

1. Navigate to **Setup** > **Campus Locations** > select a campus > **Add/Edit** (button) > **Financial Aid** (tab).
2. Select **Global** or **Other** from the Servicer Link drop-down menu.
3. Click **Servicer Configuration**. CampusNexus Student displays the following form.



4. If the Servicer Link selection is *Global*, a Global Setup form is displayed. This form is used to set up the following

information:

Field Descriptions

Field	Description
Servicer School Number	10 characters. Enter the number assigned to your institution by the servicer. This number is used when exporting FA records to the servicer. Contact your servicer if you do not know this number.
File Extension Identifier	8 characters. Provided by your servicer. Contact your servicer if you do not know this information.
User Assigned to Import Data	Select from a list of all users assigned to any group with more than Display Only Permissions in FA.
Financial Aid Administrator	Select from a list of all users with more than Display Only Permissions in CM and Daily/FA.
Student Accounts Administrator	Select from a list of users with more than Display Only Permissions in SA Post.
Global Refund Policy	Select the refund policy used for the Global refund calculation.
Prevent Users from Modifying Title IV Aid?	Select Yes or No. The default is Yes.
Required Term Codes on Disbursement Imports?	Select Yes or No. The default is Yes. If you selected Yes, define your disbursement schedules by the Academic Year Start Date Range, Campus, and Fund Source. If you have questions about your disbursement dates, contact your servicer. If you have questions on how to set up your schedules, contact Support (1-800-483-9106).
Check Paid Disbursements vs Approval Criteria?	Select Yes or No. The default is No.
Enable Global Exception Security?	Select Yes or No. The default is No.
Approve Disbursement Batches for Posting When Payment File Import Exceptions Exist?	Select Yes or No. The default is No.
Allow Multiple Disbursements Within the Same Month?	Select Yes or No. The default is No.
Process Change Records for Canceled Disbursements?	Select Yes or No. The default is No.
Days After Disbursement Date to Refund Due Date	If the "Check Paid Disbursements vs Approval Criteria?" option is Yes, you can enter a number in this field.
Servicer Export Path:	Specify the path to the location of the academic extract files.

Note: Contact your servicer if you have questions about the data for this form.

5. Click **Save**.

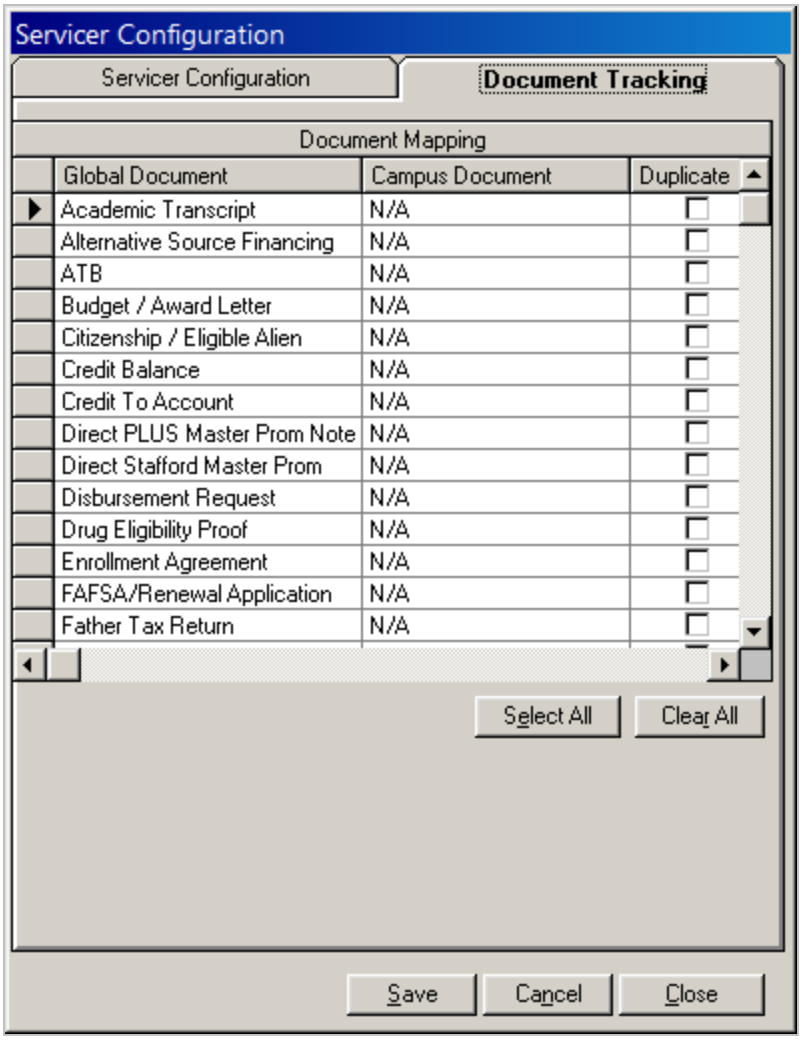
To continue further Global servicer configuration, proceed as follows:

1. Specify your terms as Global Terms. Enter the **Add/Drop Date** for each **Global Term** for institutions that are using the Add/Drop and Pre-Pull Academic Extracts. (**Lists** > **Academic Records** > **Term** > **Edit**).
2. Enter the fund source code used by the servicer in the **Third Party Code** field. These codes are provided by your servicer (Fund Source Map). Make sure all aid is correctly marked as "Title IV". (**Lists** > **Financial Aid** > **Fund Source** > **Edit**).
3. The 6-digit Lender ID should be populated in the **Lender/ServicerID** field for all lenders packaged by your servicer. These codes are provided by your servicer (Lender ID Map). Enter the Default Servicer and Guarantor on the lender. (**Lists** > **Financial Aid** > **Lenders** > **Edit**).
4. Verify that the **Clock to Credit** indicator is set up correctly for each program version. Select this option if your institution is subject to a Clock Hour to FA Credit Conversion ratio. Enter the Service Program ID. (**Lists** > **Financial Aid** > **Programs** > **Edit**).
5. If the **Servicer Link** field is turned on by selecting a servicer, COD and Direct Loan must be turned off for the Direct Loan ID and Report Pell ID in the Financial Aid Settings. (**Setup Menu** > **Campus Locations** > **Campuses** > **Financial Aid tab** > **Servicer Configuration**).

Note: When you edit a Campus, all changes are audited. Audit verifications are handled at the database level only and performed through appropriate SQL queries.

Document Tracking Tab

1. Click the **Document Tracking** tab. *Global* documents appear on the left side, drop-down lists for *Campus* documents appear on the right side.



2. When you click inside a Campus Document cell, it becomes a drop-down list. Select a **Campus Document** to correspond to each Global document listed in the grid.
3. When the **Duplicate** check box is selected, the document that is configured is allowed to appear multiple times within the student's Document Tracking. If this option is not selected and a document sent in the SD file that exists in the student's folder is in an "On file" status, the record is ignored and will not appear multiple times for the student.
4. Click **Save**. CampusNexus Student displays a validation message if you left any Global documents unmapped.
5. Click **Yes** to continue or **No** to go back and map all documents.

   If there is a document in the SD file that is required (status of **Y** or **N**) but it is not mapped to a CampusNexus Student document, a Servicer Exception is created for the document. A servicer exception is also created if CampusNexus Student cannot find an enrollment for a student contained in the SD file.
6. Click **Close** to close the form and save your entries.

Note: When you edit a campus, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.

The import of the SD file will not delete documents from a student's document folder when they are not needed by Global FAS. Therefore, we strongly recommend that the setup of CampusNexus Student documents mapped to the Global document list

(**Setup** > **Campus Locations** > **Campuses** > **Financial Aid** > **Servicer Configuration** > **Document Tracking**) not be used for purposes other than tracking the completion of a student's file at Global FAS.

We also recommend that the list of documents not be added to the student's document folder. Furthermore, any existing document triggers that include Financial Aid documents should be deactivated. These guidelines ensure that only those documents required for the student's file are included in their CampusNexus Student document folder.

Locking Academic Year/Loan Period Awards

Users can direct CampusNexus Student not to update Academic Year (AY) and Loan Period (LP) Credits/Hours/Weeks when entering transfer credits if any award in the AY/LP is fully disbursed.

To enable this feature:

1. Navigate to **Setup** > **Campus Locations** > select a campus > **Add/Edit** (button) > **Financial Aid** (tab).
2. On the Additional Settings tab, select **Do not adjust AY/LP if award fully disbursed**.
3. Click **Save**.

In addition, users can assign a hard coded system activity to a specific staff user with the permissions to alert the staff that CampusNexus Student did not change the individual students credits/hours or weeks values due to an Award being fully disbursed.

1. On the Additional Settings tab of the Financial Aid form, click **AY/LP Alerts**. The AY/LP Alert dialog box is displayed.
2. Select **On**. The Notify list is activated.
3. Select a person to receive the activity from the Notify list.
4. Click **Save**.

The following scenarios are affected by this enhancement:

- CampusNexus Student adjusts an AY/LP sequence when transfer credits, CLEP, Associated, or reassigned courses prior to the PV start date are added and no awards have been fully disbursed for that AY/LP.
- CampusNexus Student adjusts the AY/LP and associated attributes for awards that are in a partially disbursed status. A notification message will not be generated if the AY/LP definition cannot be adjusted.
- If an award has been fully disbursed when transfer credits, CLEP, Associated, or reassigned courses prior to the PV start date are added and there is a staff user assigned to the activity, CampusNexus Student creates an activity which includes a message that the AY/LP cannot be changed.

The credits and weeks for an AY/LP are not automatically adjusted if any award has all disbursements in a “Paid” status.

This feature also works when CampusNexus Student is configured to "Allow zero out extra AY/LP". With both features enabled, a student’s AY/LP cannot be reduced to zero when transfer credits, CLEP, Associated, or reassigned courses prior to the Program Version start date are added and the AY has been fully disbursed.

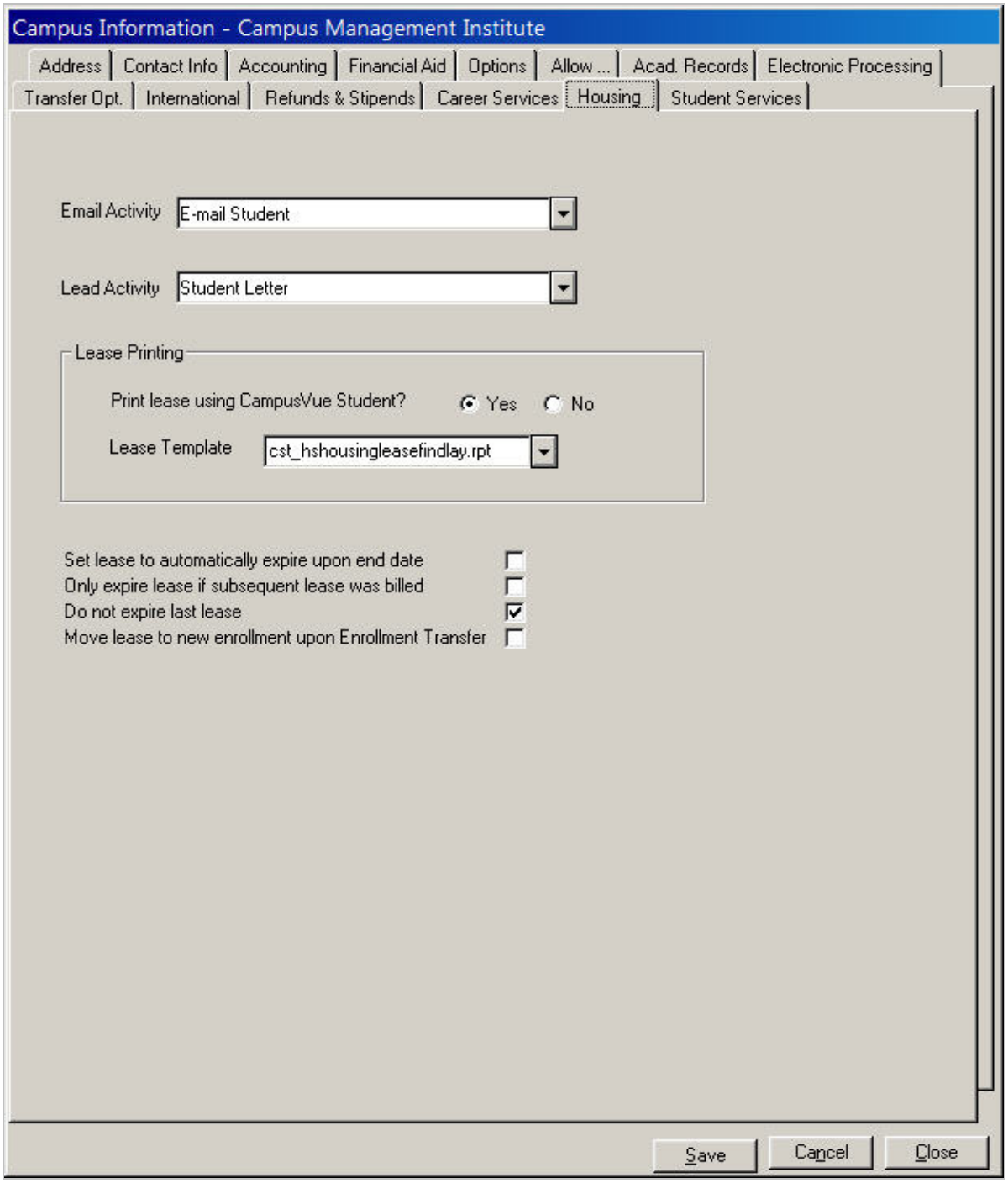
If the student has been only packaged or partially disbursed and CampusNexus Student determines the Academic Year and Loan Period are no longer needed, an adjustment is made to zero for credits/hours or weeks of the final Academic year and Loan Period.

Campus Information - Housing Tab

Use the Housing tab of the Campus Information form to specify lease options for housing facilities at a campus.

To add or edit housing lease information for a campus:

1. Navigate to **Setup** > **Campus Locations** > select a campus > **Add/Edit** (button) > **Housing** (tab).



2. Specify appropriate options. For more information, see Field Descriptions.
3. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Note: When you edit a campus, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.

Field Descriptions

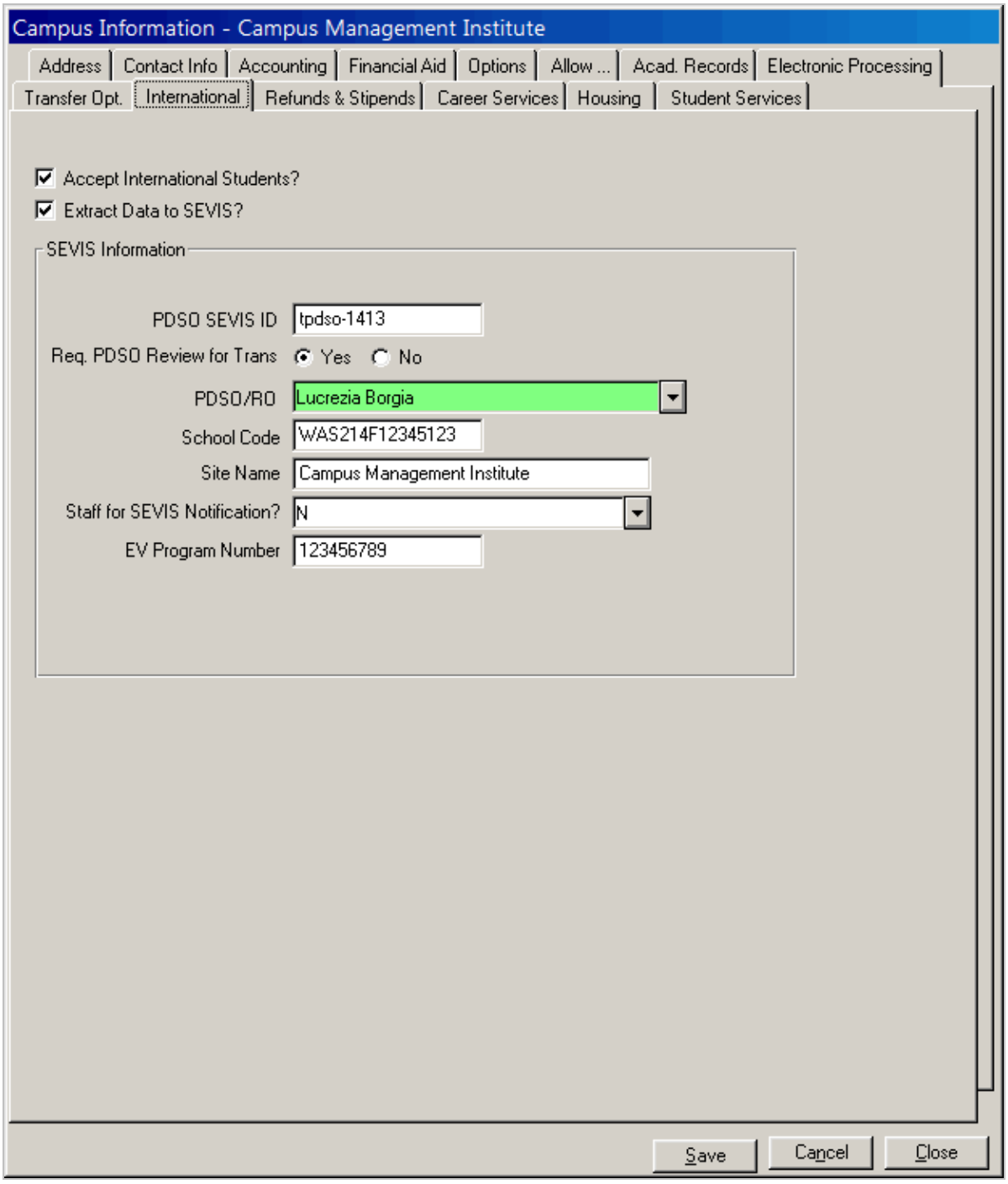
Field	Description
Email Activity	Select the default Email Activity.
Lead Activity	Select the default Lead Activity.
Print Lease Using CampusNexus Student?	Select whether leases should be printed through CampusNexus Student.
Lease Template	Select a customized lease to associate with your campus. Only one customized lease can be associated with a campus at a time. By default this option is blank.
Custom Housing Lease Report	Using the Report Maintenance function, create a custom report based on the Housing Lease report. The name of the report must be in the format: `cst HsHousingLease%.rpt`. For more information, see Report Maintenance Overview.
Set lease to automatically expire upon end date	Select this option if you want CampusNexus Student to automatically expire leases when they reach their end date.
Only expire lease if subsequent lease was billed	Select this option if you want CampusNexus Student to expire a lease only if a subsequent lease is billed (or it is the last lease).
Do not expire last lease	Select this option to prevent a student's last lease from expiring on the ending date.
Move lease to new enrollment upon Enrollment Transfer	Select this option to transfer a lease to the new enrollment when a student transfers to a new enrollment.

Campus Information - International Tab

Use the International tab of the Campus Information form to set up non-immigrant (NI) student and SEVIS processing information. The Student and Exchange Visitor Information System (SEVIS) requires that institutions having non-immigrant students report certain information to the Immigration and Naturalization Service (INS).

To add or edit SEVIS processing information for a campus:

1. Navigate to **Setup** > **Campus Locations** > select a campus > **Add/Edit** (button) > **International** (tab).



2. Complete the fields on this tab. For more information, see Field Descriptions.
3. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Note: When you edit a campus, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.

Field Descriptions

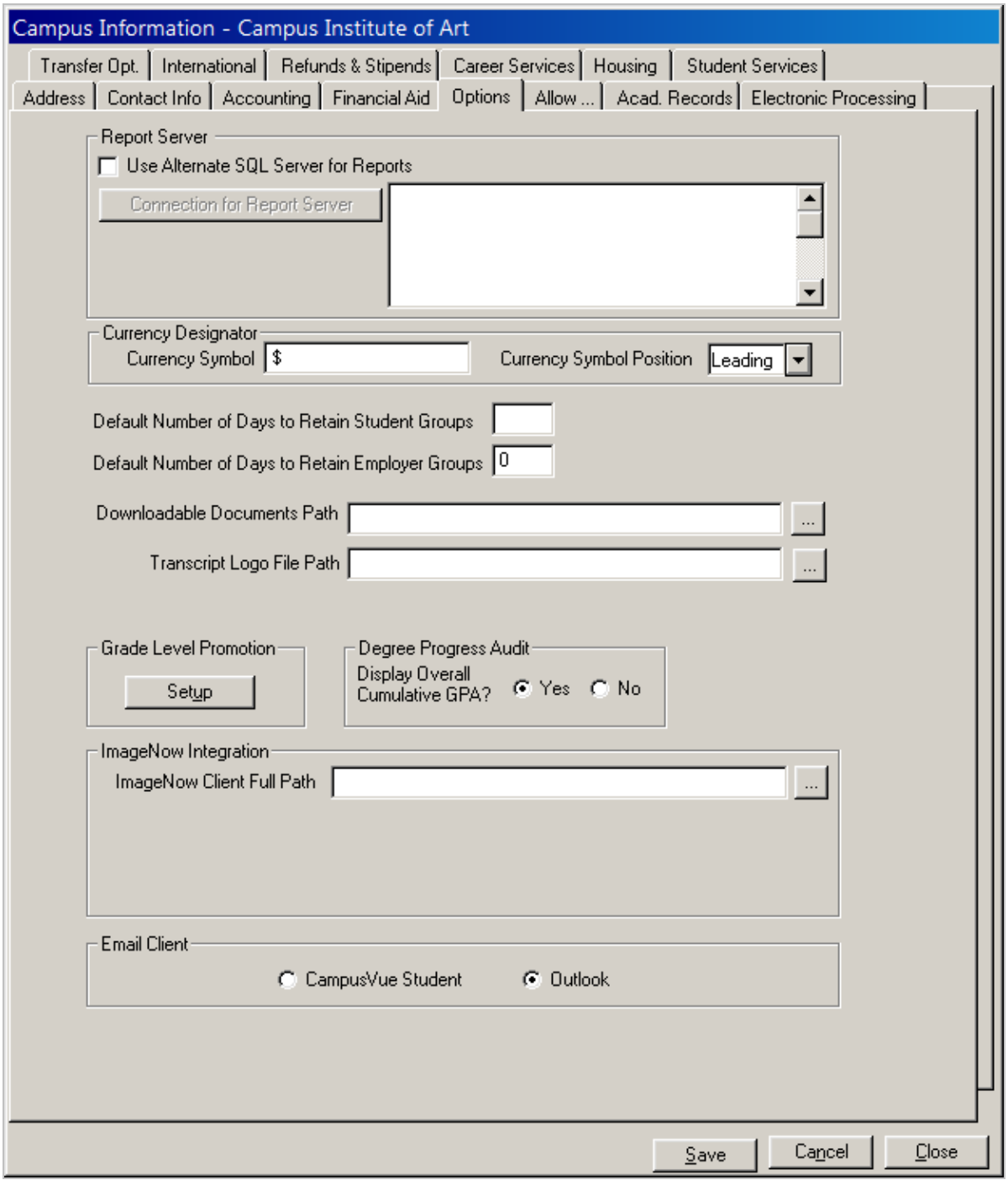
Field	Description
Accept International Students?	Select Yes to indicate that you want to use the SEVIS features, i.e., that your institution accepts International Students covered by the Student and Exchange Visitor Program (SEVP) regulations and that you must gather the required data.
Extract Data To SEVIS?	Select Yes to have CampusNexus Student extract the necessary data for transmission to SEVIS. If you select No, the extract process becomes unavailable. **Note**: The SEVIS Information data below this option is not displayed until you select Yes. This option defaults to No and should remain No until the SEVIS communication features are fully defined and developed in CampusNexus Student.
PDSO ID.	PDSO's INS identification number from SEVIS.
Req. PDSO Review for Trans.	Must the PDSO review SEVIS data before it is transmitted to SEVIS? Select Yes to indicate that the DSO is the only person who can set a batch transmission s Status to "Ready to Send".
PDSO/RO	Designated School Official or Responsible Officer for the campus group
School Code	School code for this campus (6 characters)
Site Name	SEVIS site name for the campus group
Staff for SEVIS Notification	DSO's user name from SEVIS
EV Program Number	Exchange Visitor program number

Campus Information - Options Tab

Use the Options tab on the Campus Information form to set up campus-specific options of a general nature, such as connection to a report server, currency settings, number of days to retain student and employer groups, paths for documents, grade level promotion rules, degree progress display options, ImageNow integration, and email client options.

To add or edit campus options:

1. Navigate to **Setup** > **Campus Locations** > select a campus > **Add/Edit** (button) > **Options** (tab).

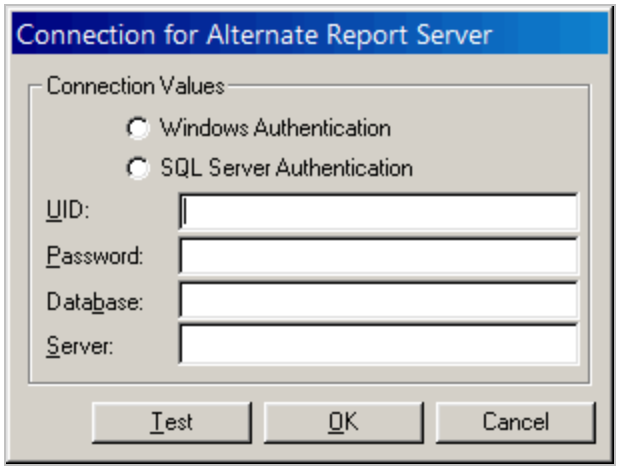


2. Complete the fields on this tab. For more information, see Field Descriptions.
3. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

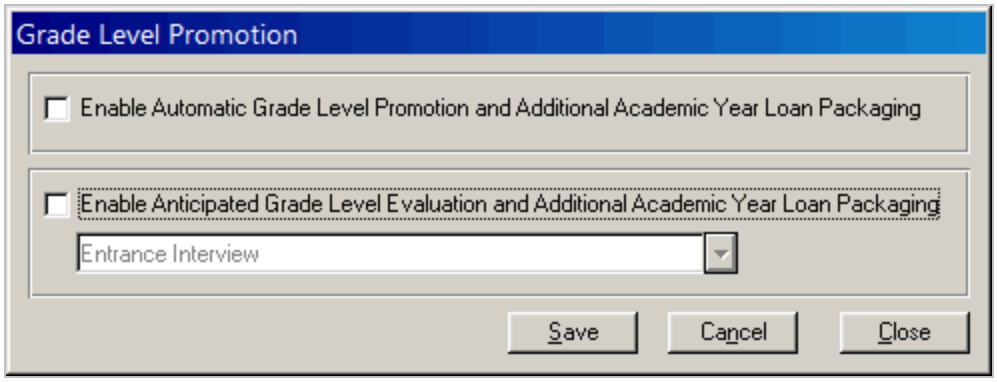
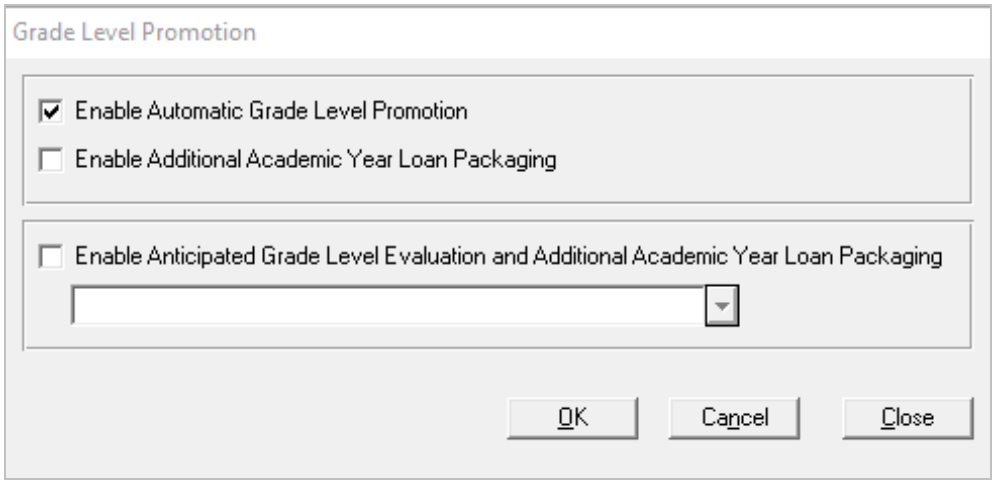
Note: When you edit a campus, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.

Field Descriptions

Field	Description
Use Alternate SQL Server for Reports	When you select this option, the Connection for Report Server button is enabled. Each campus may use an alternate server for reports. An option is available on each report to indicate if the report should be run from the "live" database or from the alternate report server. Setting up the alternate report server is the responsibility of the customer. The backup database can be set up using SQL Server 2000 replication. The customer, while setting up the replication, determines how often the report database is updated. During the setup of the replication, records can be filtered by campus ID and sent to different servers/databases based on the campus ID. When the records are filtered in this manner, reporting from the backup server will only include the records that are being published to the backup server (a user running a report against the backup database cannot generate a report that includes records for a campus that is not in the backup database). See What is Replication for additional information. **Note**: The FLASH report always uses the report server.

Field	Description
Connection for Report Server (button)	When you click this button, the Connection for Alternate Report Server window is displayed.  a. Specify the **Connection Values**. • If you select Windows Authentication, specify the Database and Server name. • If you select SQL Server Authentication, specify the UID (User ID), Password, Database, and Server. b. Click **Test** to test the values you entered. CampusNexus Student tries to connect to the appropriate server and SQL database. c. Click **OK** if the test is successful. Otherwise, correct the data entry values and test again. When you click OK, the connection parameters are displayed in the text box on the form. d. Click **Save** to save your connection settings.
Currency Designator	Choose a symbol to represent the currency your school accepts. For example $, £, etc. Use the drop-down list to indicate whether you want the symbol to appear before or after the amount. **Note**: This option adjusts the default paper size for reports to the typical choice for that currency (for example A4 for £, or 8.5 x 11 for $).
Default Number of Days to Retain Student Groups	Specify the number of days to retain student groups. When a group is expired, check the need for the group or the members in that group. When this feature is enabled, a dialog box is displayed when you open the Student Groups form. The message prompts you to have CampusNexus Student display all expired groups. Expiration dates of all groups are also shown in the grid of student groups.
Default Number of Days to Retain Employer Groups	Specify the number of days to retain employer groups.

Field	Description
Downloadable Documents Path	Click ... to select a location to which documents will be downloaded. **Note**: Ensure that the documents are stored in a folder which is accessible by the COM server. The Windows Service retrieves documents from the path defined in the Downloadable Documents Path and cannot retrieve the document if the path does not refer to a local path or a shared public folder.
Transcript Logo File Path	Click ... to select a location for the logo that is displayed on transcripts.

Field	Description
Grade Level Promotion	To enable Automatic Grade Level Promotion and Anticipated Grade Level Evaluation: 1. Click the **Setup** button. The Grade Level Promotion form is displayed.   2. Select **Enable Automatic Grade Level Promotion and Additional Academic Year Loan Packaging Enable Automatic Grade Level Promotion** or/and **Additional Academic Year Loan Packaging**. - OR - Select **Enabled Anticipated Grade Level Evaluation and Additional Academic Year Loan Packaging**. If you choose this option, select a Contact Manager activity from the list. When CampusNexus Student inserts additional eligibility loan records onto the student's package and an activity trigger has been set up, CampusNexus Student notifies the appropriate staff member to review the additional eligibility loans. 3. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. Next, assign Grade Level Promotion Rules for each Program Version. For more information, see Grade Level Promotion Rules. If CampusNexus Student determines that a student is expected to move to the next grade level, any additional eligibility loans for which the student qualifies are added to the student's package (in the current academic year) at an estimated status. A grade level is associated with each student

Field	Description
	enrollment record. **Note**: When the Grade Level Promotion feature is enabled at the campus level, an SQL job runs periodically that executes a stored procedure to evaluate enrollments. Within this stored procedure, the add/drop date configuration is determined as part of the logic to include the Academic Records system level setting for add/drop campus and uses the add/drop date configured at the course section level when the 'Add/Drop Flag' is set to 'S - Course Section Enforced'. If the 'Add/Drop Flag' is set to: • 'C - Campus Enforced' or 'T - Term Enforced', once a term is evaluated for anticipated grade level promotion, it is not evaluated again. • 'N - Not Enforced', the term can be evaluated more than once as long as all other criteria have been met. • 'S - Course Section Enforced', CampusNexus Student evaluates the anticipated grade level promotion the same as 'N - Not Enforced'. This is because a student may add or drop a course throughout the term until it ends, which may end up changing the student's situation as far as grade level promotion. As a result, students can be evaluated more than once per term.
Degree Progress Audit: Display Overall Cumulative GPA	This setting determines whether the overall cumulative GPA is displayed when the Degree Progress Audit is performed.

Field	Description
ImageNow Integration: ImageNow Client Full Path	Click ... to select the path for the ImageNow Client. The installation of ImageNow 6.0 client and server allows for the coexistence of version 5.4 on the same machine for testing purposes. The ImageNow default is version 6.0 in CampusNexus Student versions 8.3 and higher. CampusNexus Student checks the path indicated in this field for the ImageNow client. If the 5.42 path is detected, CampusNexus Student executes the 5.42 version; otherwise, the 6.0 version is executed. The path to the ImageNow client changed for Version 6.0, along with the name of the ImageNow 6.0 client executable and its location. Customers updating from ImageNow 5.4 to ImageNow 6.0, must change the name and location in CampusNexus Student in the ImageNow Client Full Path field as follows: • In version 5.4, the client executable is located in Program Files\ImageNow. • In version 5.4, the client executable is named imagenow32.exe. • Full client path for 5.4: \Program Files\ImageNow\ imagenow32.exe • In version 6.0, the client executable is located in Program Files\ImageNow6\bin. • In version 6.0, the client executable is named imagenow.exe. • Full client path for 6.0: \Program Files\ImageNow6\bin\imagenow.exe **Note**: Upgrading from version 5.x to version 6.0.x must be performed by a trained PSI Product Upgrade Engineer. To arrange for this upgrade, contact Perceptive Software Technical Support at 800.941.7460 or email upgrade@imagenow.com. Before calling, gather the following information: • Details about the 6.0 upgrade process • ImageNow/CampusNexus Student integration scripting changes required. When the upgrade has been completed and the new integration scripts added, the only change that must occur in CampusNexus Student is the ImageNow client path in this field.
Email Client	Indicate if your school uses Microsoft Outlook or CampusNexus Student for e-mail.

Campus Information - Refunds & Stipends Tab

Use the Refunds & Stipends tab on the Campus Information form to set up basic information about your institution's policies for refund of tuition and other fees and stipends for living expenses.

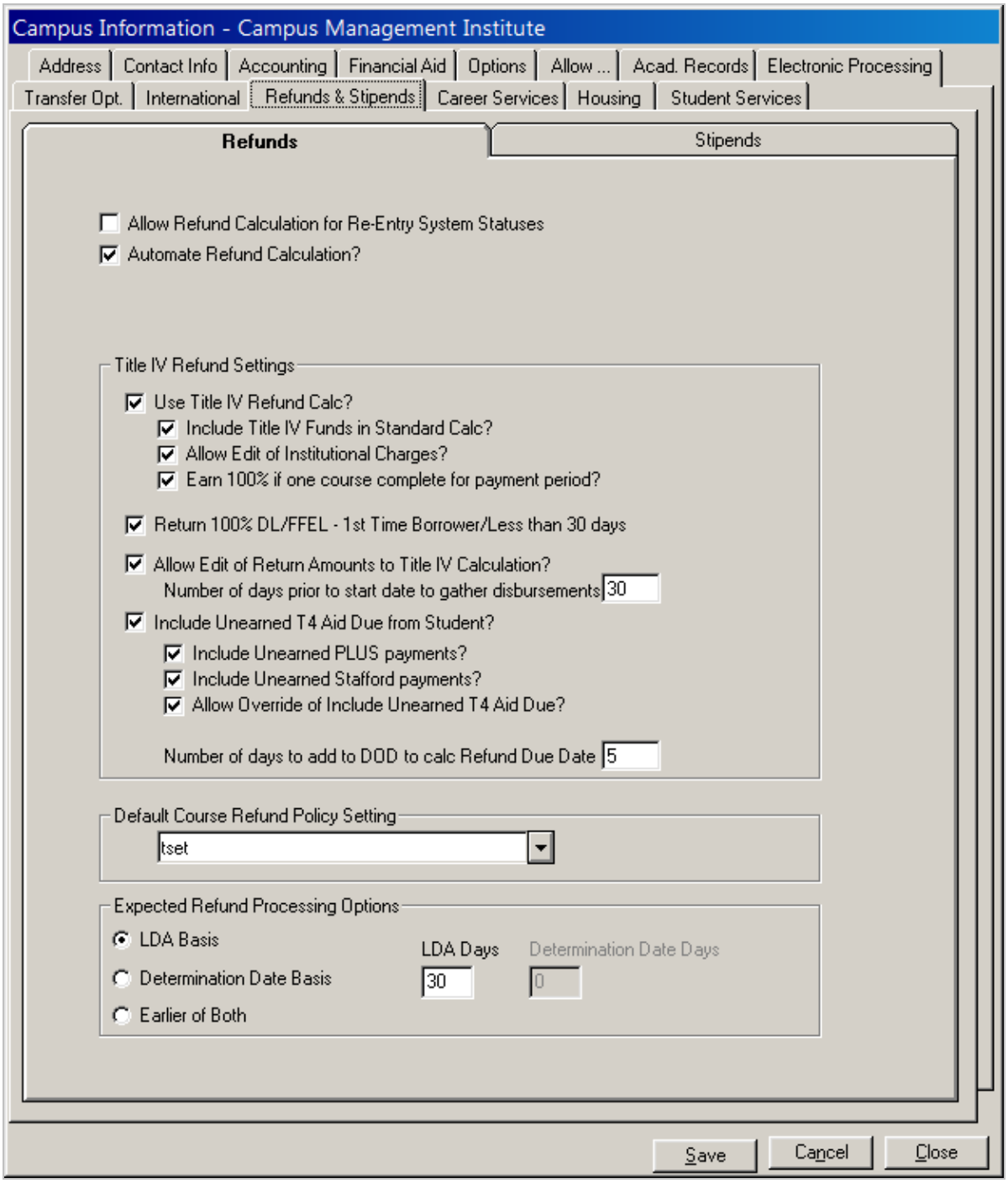
Refunds are monies returned to students, government agencies, and private agencies when a student is in school for a shorter time than the expected period for which the student is receiving a grant or loan. This could be due to early graduation, dropping a program, military service, medical leave, etc. See Refunds Subtab.

Stipends are monies from financial aid fund sources to the student to help with the living expenses related to attending an institution. See Stipends Subtab.

Refunds Subtab

To add or edit refunds settings for a campus:

1. Navigate to **Setup** > **Campus Locations** > select a campus > **Add/Edit** (button) > **Refunds & Stipends** (tab) > **Refunds** (subtab).



2. Specify appropriate options. For more information, see Field Descriptions - Refunds Subtab.
3. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Note: When you edit a campus, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.

Field Descriptions - Refunds Subtab

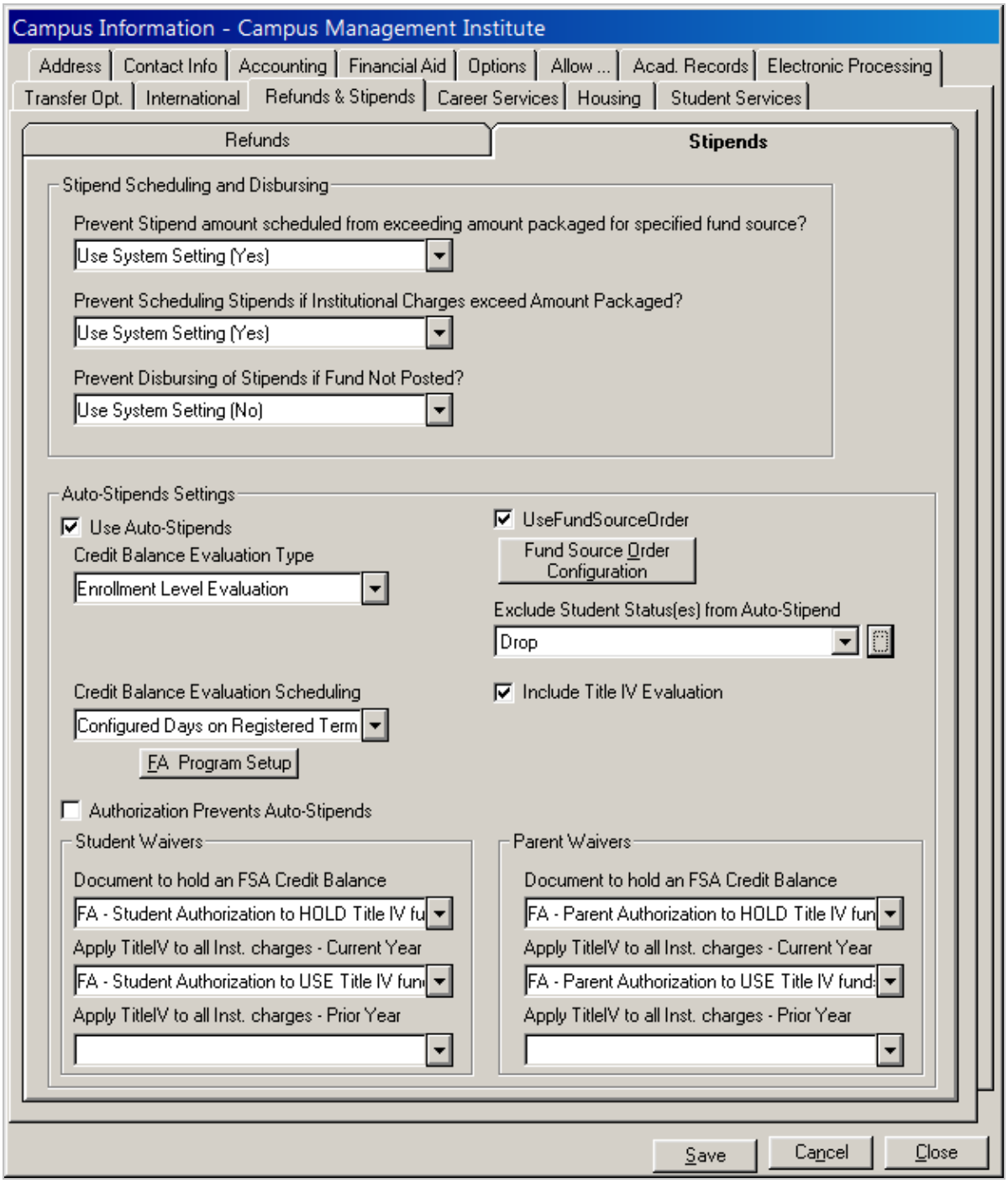
Field	Description
Allows Refund Calculation for Re-Entry System Statuses	Select this option to set up a standard refund calculation for students. For detailed information on how to set up refund calculations, see Refund Policies.
Automate Refund Calculation	This feature is used by small institutions that have batches of 200 or fewer students to help manage the timing of refund calculations for students who drop out. When this option is enabled and a student drops out of school, a "placeholder" refund calculation record is added to student's Refund Calculation form. This is a hypothetical calculation of the expected refund date should the student drop out. Use the Drop Report with "Include Refund Calculation Information" option to track the institution's performance with regard to processing refunds.
Title IV Refunds Settings	
Use Title IV Refund Calc?	Select this option to use the Title IV Refund Calculation. This option must be enabled if students receive government grants or loans (Pell, SEOG, etc.).
Include Title IV Funds in Standard Calc?	Select this option to include Title IV money if students receive government funding.
Allow Edit of Institutional Charges?	Select this option to allow users to change the amount of institutional charges in the refund calculation. This is usually done when actual student expenses (books, living expenses, etc.) are different from projected expenses. **Note**: This option is not applicable for students whose billing frequency is by payment period. Institutional charges for these students can always be edited.
Earn 100% if one course complete for payment period?	Select this option to indicate that the institution keeps 100% of the tuition payment if a student completes one course during the period for which he/she has paid. **Note**: This option is not applicable for students whose billing frequency is by payment period.
Return 100% DL/FFEL - 1st Time Borrower/Less than 30 Days	Select this option to indicate that the student or lending institution will be refunded 100% of the payment to the institution if the student drops the program within 30 days or is a first-time borrower ('borrower' means a person who borrows tuition money from any lending institution).
Allow Edit of Return Amounts to Title IV Calculation?	Select this option to allow users to edit the return amounts for Title IV refunds by clicking on that is displayed on the Refund Calculation form. 1. If this option is enabled, and you click **Calculate** on the Refund Calculation form, the Return of Title IV Funds Calculation wizard is displayed. 2. Select one of the previously calculated Title IV options and follow the prompts to where changes are needed, make your modifications and continue following the prompts until you have selected the **Finish** button in the wizard.

Field	Description
Number of days prior to start date to gather disbursements	Specify the number of days before the start date that the disbursements are scheduled to be gathered. If any funding amounts were posted before the student's enrollment, this option allows you to include those amounts for refunds. This option is only available if 'Allow Edit of Return Amounts to Title IV Calculation?' is enabled.
Include Unearned T4 Aid Due from Student?	Select this option to include unearned Title IV Aid in the refunds that are scheduled from the institution within the Return of Title IV Funds Calculation. See Allow Edit of Return Amounts to Title IV Calculation?
Include Unearned PLUS payments	Select this option to include unearned PLUS payments in the refunds that are scheduled from the institution within the Return of Title IV Funds Calculation. See Allow Edit of Return Amounts to Title IV Calculation?
Include Unearned Stafford payments	Select this option to include unearned Stafford payments in the refunds that are scheduled from the institution within the Return of Title IV Funds Calculation. See Allow Edit of Return Amounts to Title IV Calculation?
Allow Override of Include Unearned T4 Aid Due?	Select this option to permit users to override the 'Include Unearned T4 Aid Due' option for individual students. This allows users to exclude the unearned Title IV aid due from the student in the scheduled refunds from the institution within each refund calculation. This option is only available if ' Include Unearned T4 Aid Due from Student?' is enabled.
Number of days to add to Determination Date to calc "Due Date"	Specify the number of days to be added to the student's withdrawal Date of Determination to calculate the Title IV Funds Return 'Due Date' in Step 6 of the Return to Title IV wizard. This is done to ensure that clients remain in compliance with Title IV regulations that require Title IV funds be returned to their appropriate Title IV program within 45 days of the Date of Determination. The value can be less than, but not greater than 45 days. The default value is 45 days.
Default Course Refund Policy Setting	Select a Course Refund Policy that will be assigned as the default when refunds are given for courses at the selected campus.
Expected Refund Processing Options	These options enable you to choose the basis for the refund deadline, the Expected Refund Process Date that is displayed on the Refund Calculation form.
LDA Basis	The refund deadline is based on the last date of attendance (LDA). If you select LDA Basis, the Determination Date Days field becomes unavailable. You must specify a value greater than 0 for LDA Days. The default is 30 days.
Determination Date Basis	The refund deadline is based on the Determination Date of the student's enrollment. If you select Determination Date Basis, the LDA Days field becomes unavailable. You must specify a number for Determination Date Days. The default is 0.
Earlier of Both	The refund deadline is based on the earlier of the two options, LDA Days or Determination Date Days. If you select Earlier of Both, you must enter numbers in both fields. The values entered for LDA Days and Determination Date Days must be greater than 0.

Stipends Subtab

To add or edit stipends settings for a campus:

1. Navigate to **Setup** > **Campus Locations** > select a campus > **Add/Edit** (button) > **Refunds & Stipends** (tab) > **Stipends** (subtab).



2. Specify appropriate options. For more information, see Field Descriptions - Stipends Subtab.
3. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Note: When you edit a campus, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.

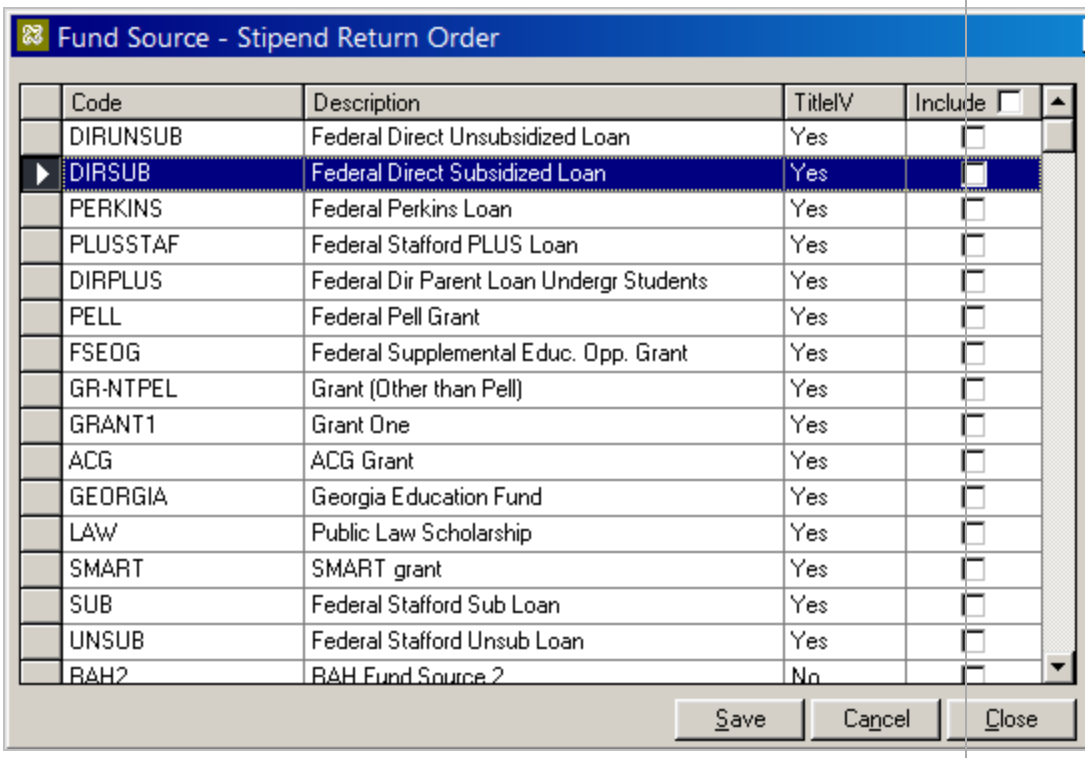
Field Descriptions - Stipends Subtab

Field	Description
Stipend Scheduling and Disbursing	
Prevent Stipend amount scheduled from exceeding amount packaged for specified fund source?	Use this option to indicate whether the institution wishes to manually schedule stipends without adhering to the business rules that require the net amount of stipends scheduled to be less than or equal to the amount packaged or the amount received for a fund source. Select Yes, No, or Use System Setting (<value>). The default is Use System Setting (<value>). The <value> is Yes or No, whichever is the current System Default value. See Limit Stipend Amount? under Student Accounts Settings - General tab.
Prevent Scheduling Stipends if Institutional Charges exceed Amount Packaged?	Select this option to indicate whether stipends are to be manually scheduled if the institutional charges exceed the amount packaged. Select Yes, No, or Use System Setting (<value>). The default is Use System Setting (<value>). The <value> is Yes or No, whichever is the current System Default value. See Limit Stipend Amount? under Student Accounts Settings - General tab.
Prevent Disbursing of Stipends if Fund Not Posted?	Select this option to specify whether stipends are to be posted and issued to the student before the funding is received on the ledger card. Select Yes, No, or Use System Setting (<value>). The default is Use System Setting (<value>). The <value> is Yes or No, whichever is the current System Default value. See Limit Stipend Amount? under Student Accounts Settings - General tab.

Field	Description
Stipend Processing Behavior for Possible Configuration Scenarios at Campus Level and Fund Source Level The table below summarizes the possible combinations of configurations at Campus level (Prevent Disbursing of Stipends if Fund not posted?) and Fund Source level (Allow Disbursing of Stipend Without Funds Posted?) and the expected results for stipend processing. **Stipend Processing Behavior**	

Campus Level Configuration	Fund Source Level Configuration	Fund Source Posted to Ledger Card?	Can Stipend Be Processed?
No	No	No	No
No	No	Yes	Yes
Yes	No	No	No
Yes	No	Yes	Yes
Yes	Yes	No	No
Yes	Yes	Yes	Yes
No	Yes	Yes	Yes
No	Yes	No	Yes

Auto-Stipends Settings	
Use Auto-Stipends	When this feature is enabled, stipends are automatically scheduled and additional filters (drop-down lists) become available on this tab. Configure the auto-stipend feature before items being posted for the evaluation time frame. Prior credit balances should be addressed by hand. The credit balance calculations can be triggered by any method of posting to the ledger card. **Note**:For a credit balance to be evaluated, the payment posted must be associated with a fund source. Unscheduled cash payments not associated with a fund source or web payments will not trigger the credit balance evaluation.
Authorization Prevents Auto-Stipends	This check box is displayed when 'Use Auto-Stipends' is selected. Authorization Prevents Auto-Stipends uses the Parent and Student Credit Balance Waivers. Select this check box if your institution enforces carrying over of credit balances. If selected, when a credit balance occurs from the result of a Title IV fund source payment, an Auto Stipend is "Prevented" or not created. A credit balance will remain on the ledger card for the Title IV evaluation.

Field	Description
Use Fund Source Order	Select this option to enable the Fund Source Order Configuration button. For more information on generating stipends with fund source order configuration, refer to Title IV Credit Balance. **To configure a fund source order**: 1. Click the **Fund Source Order Configuration** button. The Fund Source - Stipend Return Order form is displayed.  2. Select the Include check box for the fund sources to include in the stipend return order. 3. Select each included fund source and click the sort buttons to establish the desired order. 4. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

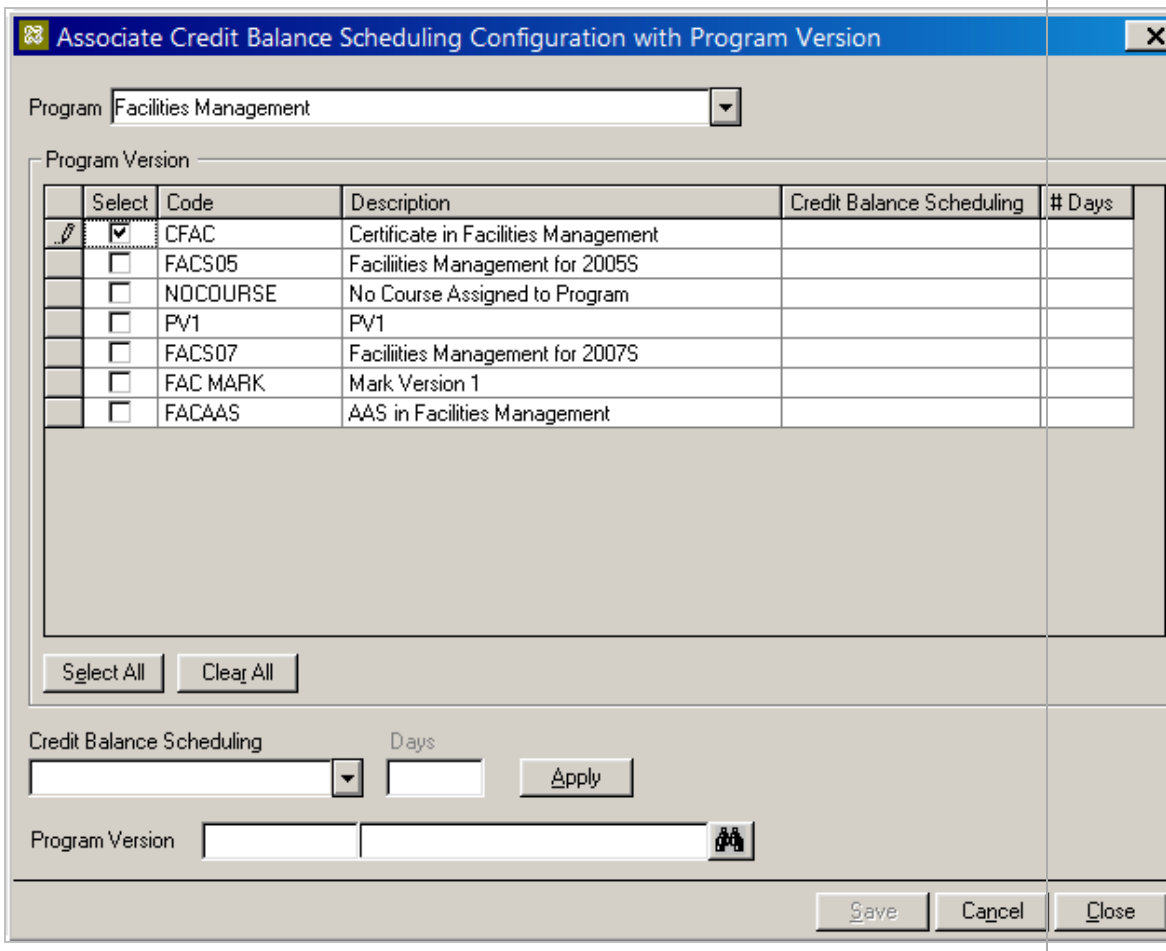
Field	Description
Credit Balance Evaluation Type	Select one of the following options. a. Student Level Evaluation Select this option to configure an 'All Transaction' credit balance evaluation to evaluate auto stipends at the student level across multiple enrollments and include a Title IV Calculation. **Note**: If a student has enrollments at two campuses, both campuses must be set to Student Level Evaluation. If one campus uses Student Level Evaluation and another campus uses another evaluation type, Student Level Evaluation will not yield the expected result. When Student Level Evaluation is selected, the Include Title IV Evaluation option becomes available and, if selected, Title IV Evaluation is run for the FSA time frame applicable to the disbursements being evaluated and each enrollment. CampusNexus Student executes the FSA Title IV Evaluation before the Student Level Evaluation: it creates a Title IV stipend and then an 'All Transaction' stipend as needed. Based on the configuration at the student level, all the stipends are posted to the Student Accounts Auto Stipend Payment Queue. CampusNexus Student ensures that Use Auto Stipend is activated before any payments are placed into the queue. If Use Auto Stipend is not activated, the payments will not go into the queue. b. Enrollment Level Evaluation This option checks for an overall credit balance for the student's enrollment that has been specified: [Total charges - (total payments - scheduled stipends and refunds)]. An Auto Stipend is generated if there is a Credit Balance on the enrollment. **Note**: A tuition charge must be posted on the ledger card for a stipend to be created for a credit balance for the Enrollment and Time Period Evaluation. c. FSA Title IV (only) Evaluation This option evaluates the student using the current Title IV Regulations for calculation of a credit balance amount on the award year for grants or Perkins and uses the loan period for loans. The calculation uses only Title IV charges and Title IV payments to calculate the credit balance amount. When a Title IV payment is posted and CampusNexus Student determines that there is a Title IV Credit Balance for an elapsed award year or an elapsed loan period, an auto stipend is scheduled, regardless of whether there is an authorization on file to hold credit balances. **Note**: If an Enrollment Level Evaluation or FSA Title IV (only) Evaluation is selected as the Credit Balance Evaluation Type, the Credit Balance Evaluation Time Frame box is disabled on the form. d. Time Period Evaluation This option is used to designate a defined period of time that will be used to calculate a credit balance.

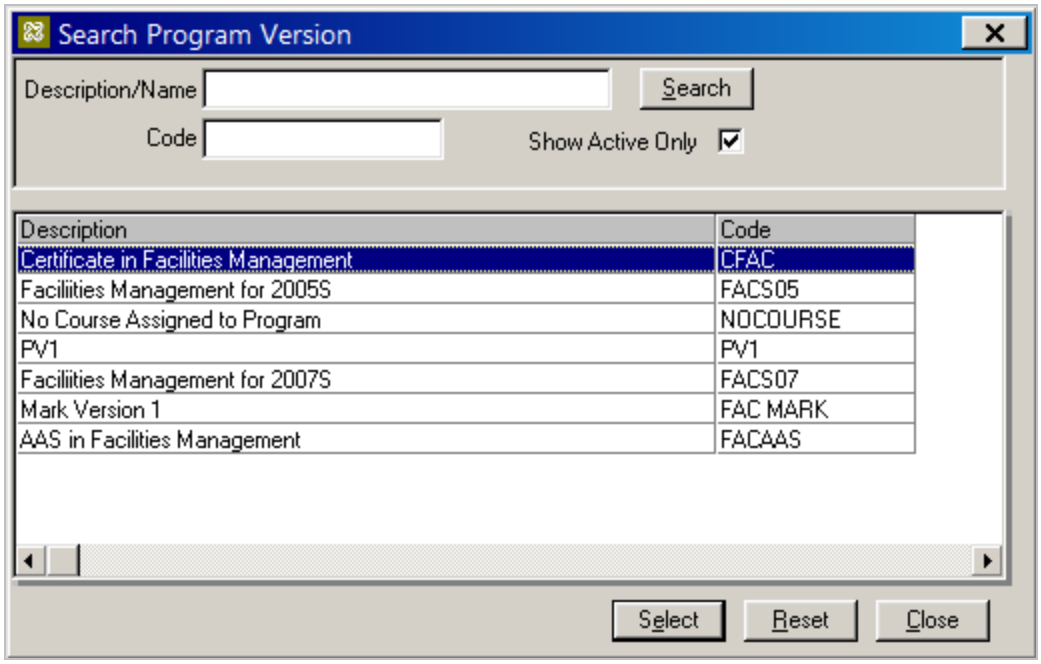
Field	Description
Credit Balance Evaluation Time Frame	Select one of the following options: a. Payment Period or Term If a Time Period Evaluation is selected as the Credit Balance Evaluation Type, the 'Payment Period or Term' option is populated by default. CampusNexus Student performs a credit balance check on the individual term or payment period time frame. You can select to include a Title IV credit balance evaluation which would occur on the FSA time frame determined by the awards in the financial aid package. Additionally, you can select Allow up to $200 of FSA funds for prior period charges. b. 'Loan Period or Academic Year This option calculates an 'All transaction' stipend. You can select to include a Title IV evaluation that will be executed before the 'All Transaction' time frame. Additionally, you can select Allow up to $200 of FSA funds for prior period charges. This configuration matches loan periods to academic years based on sequences. For example, Loan Period 1 = Academic Year 1, Loan period 2 = Academic Year 2, etc. When the Loan Period or Academic Year is selected along with Fund Source Order to Stipend, CampusNexus Student resolves any preexisting credit balance within the current loan period or academic year being evaluated. The prior existing credit balances are not automatically satisfied until a new payment is made to that Loan Period or Academic Year, which will result in a greater credit balance. When the financial aid package consists of Title IV Loans and Title IV grants, the Title IV Loan Period is used for the evaluation time frame of the 'All Transaction' calculation. This allows the calculation time frames to match up for both evaluation types and gather all charges and payments for the Packaged credit values of the Academic Year. If the financial aid package consists of only Title IV grants, the Academic Year is used for the evaluation time frame of the 'All Transaction' calculation. Non-Title IV awards can exist in either of the packages mentioned here. CampusNexus Student uses the Academic Year time frame to match charges with the financial aid awards for the time frame. If a Title IV evaluation is included for this scenario, it would occur on the Award Year. **FSA Principals** If a student's financial aid package includes a Direct Loan, the 'year' for Title IV credit balance evaluation is the loan period even if the financial aid package contains Award Year based funds. Award Year based funds include all Title IV Grants and Perkins loans. If the student's financial aid package does not have a Direct Loan, the 'year' for Title IV credit balance evaluation is the Award Year. When determining a debit balance 'Tuition, Fees, Room and Board' are always included. 'Other Charges' can be included in the evaluation if the waivers that allow the charges to

Field	Description
	be included are on file. (Setup > Campus Locations > Edit a campus > Refunds & Stipends > Stipends). • 'Tuition, Fees, Room and Board' - To designate these fees in CampusNexus Student, select 'Include in 'Title IV Institutional Charges' and 'Always allow Title IV to Pay charge' on the transaction code (Lists > Student Accounts > Transaction Codes) . • 'Other Charges' - To designate these fees in CampusNexus Student, select 'Include in Title IV Institutional Charges' and clear 'Always allow TIV to Pay charge' on the transaction code (Lists > Student Accounts > Transaction Codes).
Allow up to $200 of FSA funds for prior period charges?	This option is available for 'Time Period Evaluation' calculations. It allows the 'All transaction' evaluation for the time period being evaluated to validate if there are up to $200 of unsatisfied Title IV charges in the prior period that have not been satisfied before applying the Title IV funds to the current period calculations. This corresponding value is then added to the current charges of the selected time frame, and then the credit balance amount is calculated. This option is available for all Credit Balance Evaluation Types where Title IV funds are used in the calculation, including Time Period Evaluation, in which the credit balance evaluation time frame is payment period or term; FSA Title IV (only) Evaluation, for which Title IV Funds are automatically included in this calculation; Enrollment Level Evaluation, and Student Level Evaluation. To apply Title IV charges to these transactions, ' Include in Title IV Institutional Charges' and 'Always allow Title IV to pay charge' must be selected (Lists > Student Accounts > Transaction Codes > Edit (a particular transaction code). Additionally, Allow up to $200 of FSA funds for prior period charges must be selected. The $200 prior period charges can be used for charges other than tuition, fees, room, and board; however, the total amount cannot exceed $200, and it must include any amount used to cover prior year charges that are tuition, fees, room, and board. For example, if $100 was already applied for fees, there would only be up to $100 remaining that could be applied for the prior period charges for which the total cannot exceed $200.

Field	Description
Credit Balance Evaluation Scheduling	Credit Balance Evaluation Scheduling applies to all Evaluation types. The Credit Balance Evaluation Scheduling drop-down list is displayed when you select a value in the Credit Balance Evaluation Type list. Select one of the following Credit Balance Evaluation Scheduling options: a. Day of Posting This option evaluates the credit balance on the same day the payment was made. b. Configured Days on Registered Term This option enables the FA Program Setup button. See FA Program Setup. When the campus is configured to control the scheduling of the processing of credit balance calculations, CampusNexus Student holds all payments made by any posting method to be processed later at the appropriate configured point in time. Once the configured scheduled time frame has elapsed, CampusNexus Student executes the credit balance evaluation processing immediately after the payment is posted; this also occurs for campuses not configured to control the timing of the credit balance evaluation. If you clear the Use Auto Stipend check box and if there are payment records waiting to be processed, as per configuration, a warning message is displayed. If you select 'Yes', the check box is disabled and the records remain unprocessed.
Include Title IV Evaluation	This check box is displayed when the Credit Balance Evaluation Type is not FSA Title IV (only) Evaluation. • If the payment is a Title IV payment and Include Title IV Evaluation is selected,CampusNexus Student evaluates the payment using 'FSA Title IV Evaluation' first and creates a stipend. Then, CampusNexus Student re-evaluates the same payment transaction through the Enrollment Level or Time Period configuration, and if needed, an additional stipend will be created. • If the payment is a Title IV payment and Include Title IV Evaluation is not selected, CampusNexus Student evaluates the payment using the Enrollment Level or Time Period configuration only. If needed, a stipend is created. • If the payment is a non-Title IV payment, CampusNexus Student evaluates the payment based on the current Enrollment Level or Time Period configuration.

Field	Description
Exclude Student Statuses from Auto-Stipend	Auto stipends can be configured to exclude student statuses across all evaluation types, so that students can be limited from having an auto stipend processed. For instance, for a student with a credit balance, no stipend is issued or scheduled if the student has dropped and is pending R2T4 calculation. You can select one or more statuses and save the status selection for the campus. Students whose statuses are configured here are excluded from the auto-stipend job calculation, and no stipends will be calculated or posted through the auto-stipend job. When a status has been excluded from the auto stipend process, a warning message reminds you that the credit balance for these students needs to be resolved manually. The Title IV Evaluation Process is triggered by the process Title IV Credit Balance job, which only runs the Title IV Evaluation. The Year and Title IV Evaluation process is triggered by the process Expired Loans for Stipends job, which only runs the Title IV Evaluation for loans about to expire before the loan period or academic year.

Field	Description
FA Program Setup	This button is enabled when you select 'Configured Days on Registered Term' from the Credit Balance Evaluation Scheduling list. When you click this button, the Associate Credit Balance Scheduling Configuration with Program Version form is displayed.  The Credit Balance Scheduling configuration for the selected program versions controls when the stipend will be created on the basis of the Start or Add/Drop date of the student's registered term. The Program field is populated with those programs that are associated with the selected campus. 1. Select a **Program** to view the program versions associated with the program. 2. Select appropriate **Program Versions** using the check boxes or the Select All button. 3. In the Credit Balance Scheduling list, select **Start Date** or **Add/Drop Date**. When Start Date is selected, the number of days before or after the Academic Registration Term Start Date to execute the credit balance calculations on registered students can be configured. CampusNexus Student allows a date range of 10 days before or 14 days after the Academic Registration Term Start Date.

Field	Description
	When Add/Drop Date is selected, an administrator can configure the number of days before or after the Academic Registration Term Add/Drop Date to execute the credit balance calculations on registered students. CampusNexus Student allows a date range of 24 days before or 10 days after the Academic Registration Term Add/Drop Date. CampusNexus Student then validates that the processing date is within the allowable range of days before and after the Academic Registration Term Start Date. 4. In the **Days** field, specify the configured days for the selected Program Versions. 5. Click **Applied** to update the Credit Balance Scheduling and Days in the Program Version grid only for the selected Program Versions. 6. Click **Save** to update the selected program versions with the newly applied values. **Note**: Click to search program versions by code or description.  The Academic Registration term is identified as follows: • Payment Period - If a payment period is associated with the payment, the student's schedule is evaluated for the term that starts closest to the payment period start date. • Term - If a payment period is associated with the payment, the student's schedule is evaluated for the: If a term is associated with the payment, the student's schedule is evaluated for a matching term or a corresponding child term related to the parent assigned to the payment. • No Payment Period or Term - If a payment period is associated with the payment, the student's schedule is evaluated for the The payment is evaluated on the same

Field	Description
	day it was posted.
Waiver Principals The waivers designated on the Stipend configuration are created in Lists > Contact Manager > Documents. They must be on file with the status code that has Approved = 'Y' in a student's Documents folder to allow the functionality for each waiver to be applied (View > Contact Manager > Documents). Any time a waiver that is on file is moved to an 'Approved' status, the logic will trigger the student to be queued for auto stipend evaluation.	
Document to hold an FSA Credit Balance (Student)	Select your institution's official credit balance waiver document containing the student approval to retain a Title IV Credit Balance during the 'year' for Title IV credit balance evaluation. If the Student Waiver selected in the configuration is on file with a document status of 'Approved', CampusNexus Student allows the institution to carry the credit balance until the end of the 'year'.
Document to hold an FSA Credit Balance (Parent)	Select your institution's official document containing the parental authorization to retain Title IV Credit Balances. This authorization is required in case PLUS funds are part of the Title IV Credit Balance. If PLUS funds are part of the financial aid package and the Parent Waiver selected in the configuration is on file with an 'Approved' status, the logic will allow the institution to carry the credit balance until the end of the 'year'.
Apply Title IV to all Inst. Charges – Current Year (Student)	Select your institution's official document containing the student approval to apply Title IV funds to 'Other Charges' in the current 'year' evaluation. Title IV funds regulations have made it mandatory to seek student authorization before applying Title IV funds to institutional charges except tuition, fees, room and board. If the Student Waiver selected in the configuration is on file with an 'Approved' status, CampusNexus Student applies Title IV Funds to 'Other Charges' that are configured to require the waiver.
Apply Title IV to all Inst. Charges – Current Year (Parent)	Select your institution's official document containing the parental approval to apply Title IV funds to 'Other Charges' in the current 'year' evaluation. This document is required in case the Title IV fund sources packaged for the student include a PLUS fund. If the Parent Waiver selected in the configuration is on file with an 'Approved' status,CampusNexus Student applies Title IV Funds to 'Other Charges' configured to require the waiver.

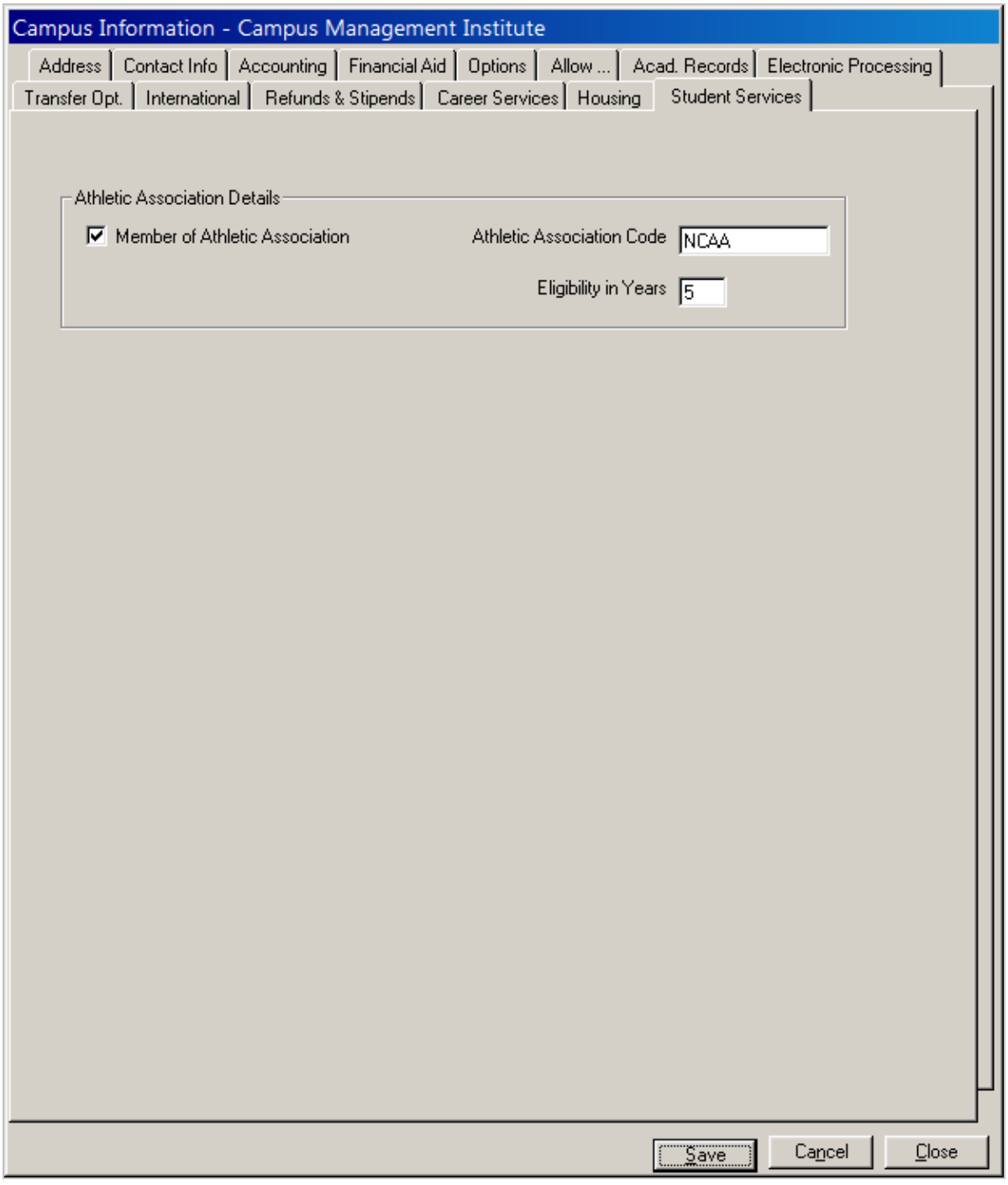
Field	Description
Apply Title IV to all inst. Charges – Prior Year (Student Waiver)	Select your institution's official document containing the student approval to allow up to $200 of current year funds to pay prior year charges which is applicable to Credit Balance Evaluation Types: FSA Title IV (only) Evaluation, all configurations where 'Include Title IV Evaluation' is selected. If the Student Waiver selected in the configuration is on file with an 'Approved' status, CampusNexus Student includes 'Other Charges' that have occurred in a prior year in the calculation to determine if there is a prior year debit balance up to $200. The waiver allows Student level Title IV disbursements to pay 'Other charges' that are configured to require the waiver.
Apply Title IV to all Inst. Charges – Prior Year (Parent Waiver)	Select your institution's official document containing the parental approval to allow up to $200 of current year funds to pay prior year charges which is applicable to Credit Balance Evaluation Types: FSA Title IV (only) Evaluation, all configurations where 'Include Title IV Evaluation' is selected. If the Parent Waiver selected in the configuration is on file with an 'Approved' status, CampusNexus Student includes 'Other Charges' that have occurred in a prior year in the calculation to determine if there is a prior year debit balance up to $200. The waiver allows Parent Loan Title IV disbursements to pay 'Other charges' that are configured to require the waiver.

Campus Information - Student Services Tab

Use the Student Services tab on the Campus Information form to configure the Athletic Association to which the campus belongs and the maximum number of years the Athletic Association allows a student athlete to be eligible to participate in intercollegiate athletics.

To add or Athletic Association details for a campus:

1. Navigate to **Setup** > **Campus Locations** > select a campus > **Add/Edit** (button) > **Student Services** (tab).



2. Select the **Member of Athletic Association** check box. The other fields on the form are enabled.
3. Specify the **Athletic Association Code** (e.g., NCAA).
4. In the **Eligibility in Years** field, enter the number of years students are eligible to participate according to the Athletic Association.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

To continue setting up and configuring your **Athlete Tracking** for initial use, navigate to Lists > Student Services > Sports.

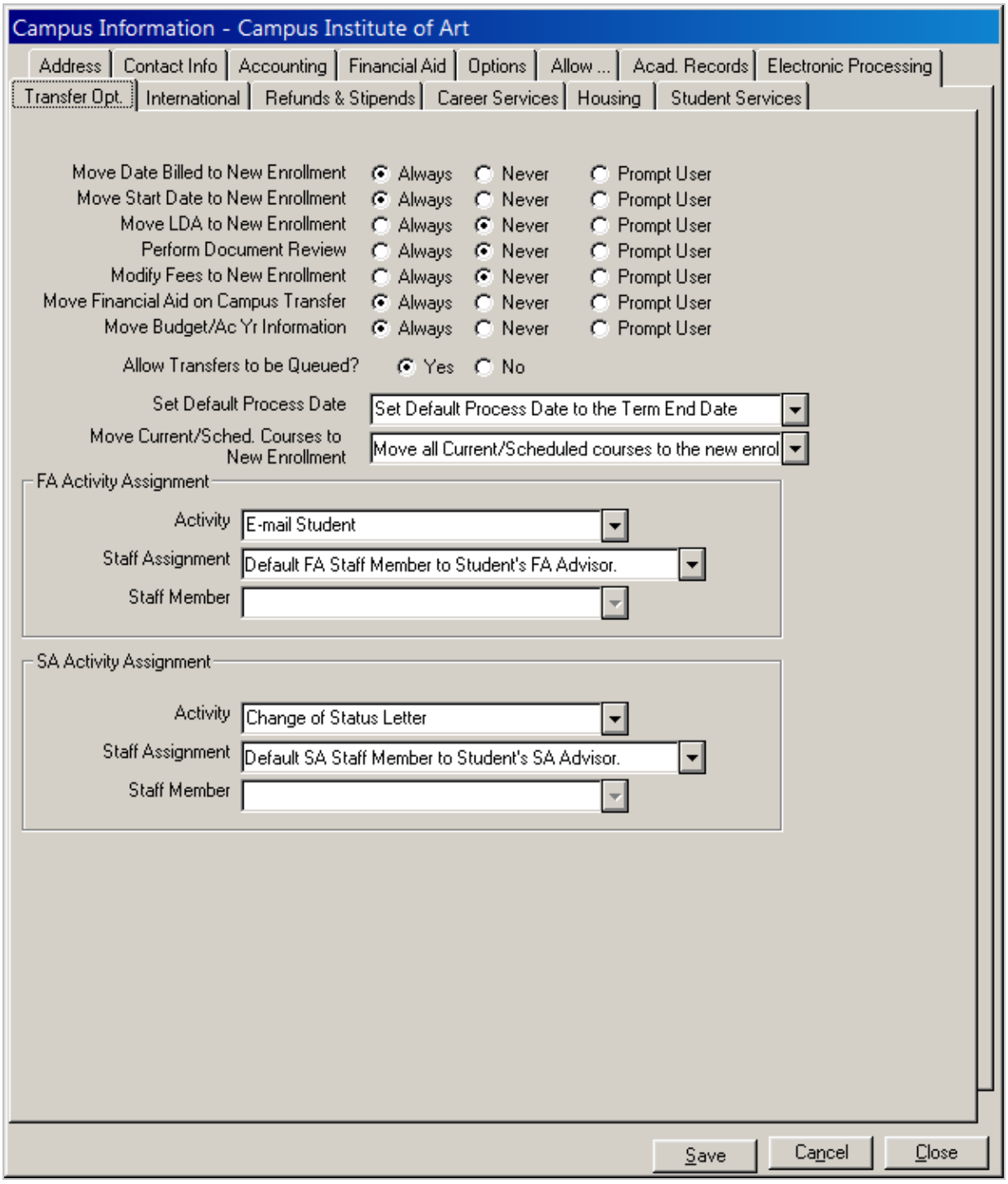
Note: When you edit a campus, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.

Campus Information - Transfer Opt. Tab

Use the Transfer Options tab on the Campus Information form to set up transfer related options, such as Date Billed, Start Date, Last Day of Attendance, Required Course list options, and activities for a staff member or financial aid advisor.

To enter the transfer options setup information for a campus:

1. Navigate to **Setup** > **Campus Locations** > select a campus > **Add/Edit** (button) > **Transfer Opt.** (tab).



2. Specify appropriate options. For more information, see Field Descriptions.

   Note: Some of the options on this form provide the options Always, Never, or Prompt User, that correspond to check boxes in the Transfer Enrollment/Campus form.

   - When you select **Always** the Transfer Enrollment/Campus form the related check box is selected but cannot be changed.
   - When you select **Never** the Transfer Enrollment/Campus form the related check box is cleared but cannot be changed.
   - When you select **Prompt User** the Transfer Enrollment/Campus form the related field is selected but can be changed.

3. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Note: When you edit a campus, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.

Field Descriptions

Field	Description
Move Date Billed to New Enrollment	Select Always, Never, or Prompt User.
Move Start Date to New Enrollment	Select Always, Never, or Prompt User. This field is displayed on the Transfer Enrollment/Campus form ONLY if the staff member viewing the form can override transfer configuration options as configured in the Academic Records tab of the Staff Information form.
Move LDA to New Enrollment	Select Always, Never, or Prompt User.
Perform Document Review	Select Always, Never, or Prompt User.
Modify Fees to New Enrollment	Select Always, Never, or Prompt User.
Move Financial Aid on Campus Transfer	Select Always, Never, or Prompt User. When you select Always or Prompt User, Pell grants are moved to the new enrollment if the attending Pell ID of the campus to which the enrollment is being transferred is the same as the attending Pell ID of the campus from which the enrollment is being transferred. Direct loans are moved to the new enrollment if the Direct Loan ID of the campus to which the enrollment is being transferred is the same as the Direct Loan ID of the campus from which the enrollment is being transferred. All other aid is moved to the new enrollment if the School code of the campus to which the enrollment is being transferred is the same as the school code of the campus from which enrollment is being transferred.
Move Budget/Ac Yr Information	Select Always, Never, or Prompt User to move budgets on campus transfers or enrollment transfers.

Field	Description
Transfer Enrollment Settings for Payment Period Logic	When the transfer enrollment process is performed on students in Program Versions that use payment periods, the logic should be selected to transfer both the start date and the Academic Year information or to not transfer both the start date and Academic Year information. This setup is found under **Setup** > **Campus Locations** > **Transfer Opt.** tab. The check box to transfer the start date and Academic Year information can be selected independently of each other; however, users should not select one without the other as the Grad Tool logic needs these to be synchronized with each other.
Allow Transfers to be Queued	Select Yes to allow transfers to be queued for batch processing.
Set Default Process Date	Select one of the following options: • Set Default Process Date to Term End Date • Set Default Process Date to Current Month End Date • No Default. User will key in Process date for each Transfer
Move Current/Sched. Courses to New Enrollment	Select one of the following options: • Move all Current/Scheduled courses to the new enrollment • Move only Current/Scheduled courses that exist in the new program's version course (to associate with program version) • Move only Current/Scheduled courses selected by the user to the new enrollment • Prompt user . (If selected, the user chooses how to handle the current/scheduled courses within the transfer wizard for each individual transfer processed.) • Do not move Current/Scheduled courses (This option is to *not* reassign scheduled courses.)
FA Activity Assignment	In the FA Activity Assignment section: a. Select an Activity. b. Select a Staff Assignment. The drop-down list is only enabled when an Activity is selected. c. Select a Staff Member. The drop-down list is only enabled when an Activity is selected and the selection in Staff Assignment is "Use Specific Default FA Staff Member."

Field	Description
SA Activity Assignment	In the SA Activity Assignment section: a. Select an Activity. b. Select a Staff Assignment. The drop-down list is only enabled when an Activity is selected. c. Select a Staff Member. The drop-down list is only enabled when an Activity is and the selection in Staff Assignment is "Use Specific Default SA Staff Member." **Note**: Remember to set up permissions for staff members. See Add or Edit a Staff Member.

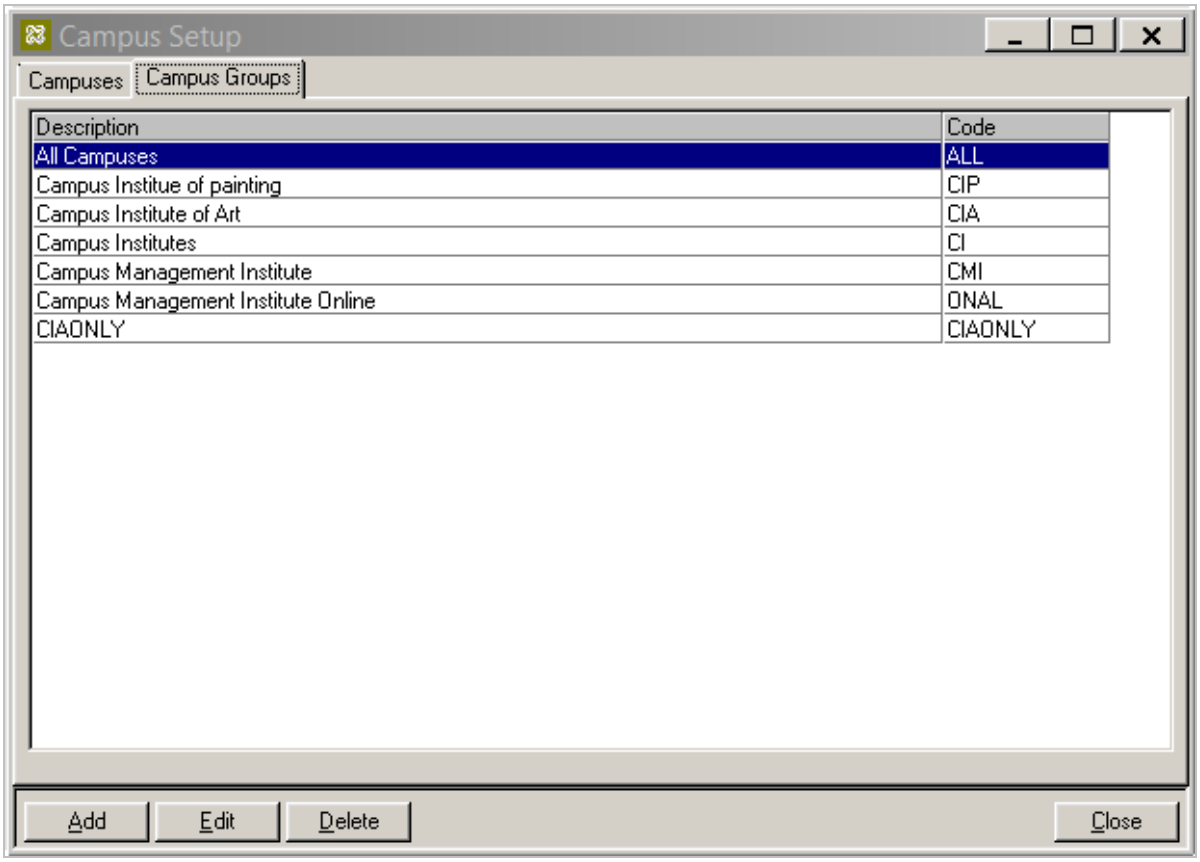
Managing Campus Groups

When an institution has more than one campus, each campus must be associated with a campus group. A campus group may include campuses that are located in the same city and share instructors and administrative staff. Even when the institution has only one campus, a campus group with one campus must be created. Many reports in CampusNexus Student use the Campus Group property as a selection option.

If your CampusNexus Student system is integrated with an accounting system, refer to CampusVue Finance, HR & Payroll or CampusNexus Finance, HR & Payroll for instructions on setting up campus groups.

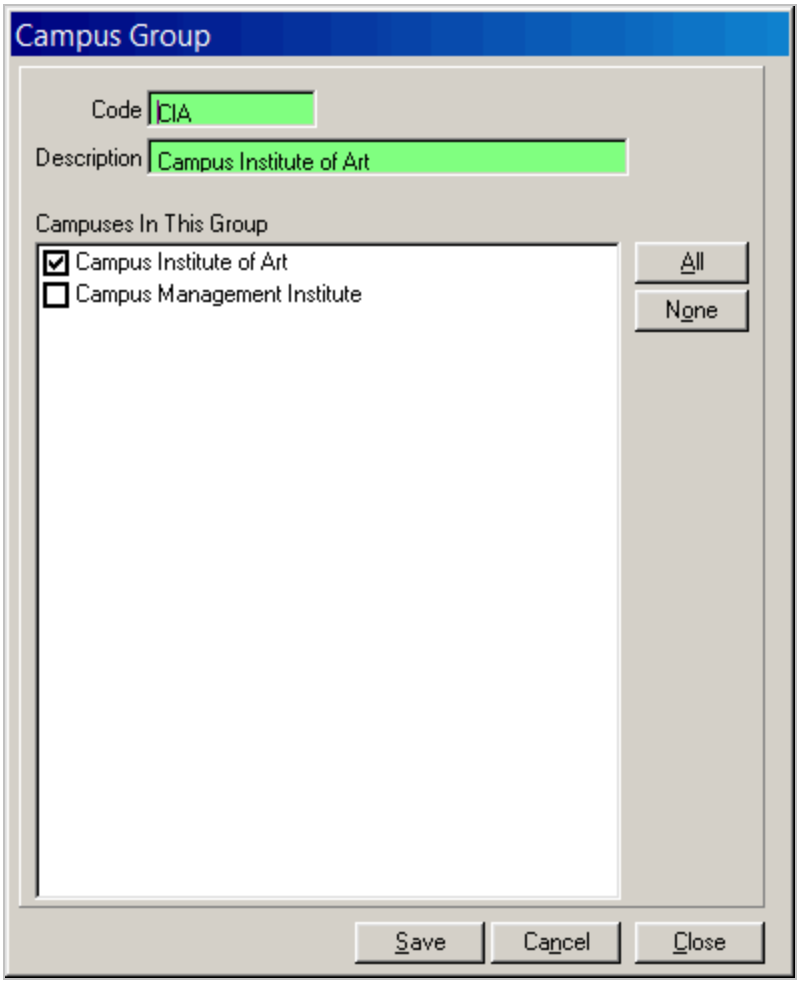
To add or edit a campus group:

1. Navigate to **Setup > Campus Locations > Campus Groups** (tab). The Campus Setup form is displayed.
2. Click the **Campus Groups** tab.



3. Click **Add** to add a campus group, or select a campus group and click **Edit** to view or change it.

   The Campus Group form is displayed. All campuses that have been set up are listed in the 'Campuses In This Group' section.



4. Specify a unique **Code**.
5. Enter a **Description**.
6. Click **All** to include all campuses in the group. CampusNexus Student places check marks beside all the campuses. Clear the check marks on campuses that you do not want to be included in the group.
7. Click **None** to exclude all campuses from the group. CampusNexus Student clears the check boxes beside each campus. Select the campuses that you want to include in the group.
8. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

To delete a campus group:

When you delete a campus group, you are only deleting the indicators that the campuses are related. The campuses in the group are not deleted. When you delete a campus group you may be affecting displays and reports that were based on the group.

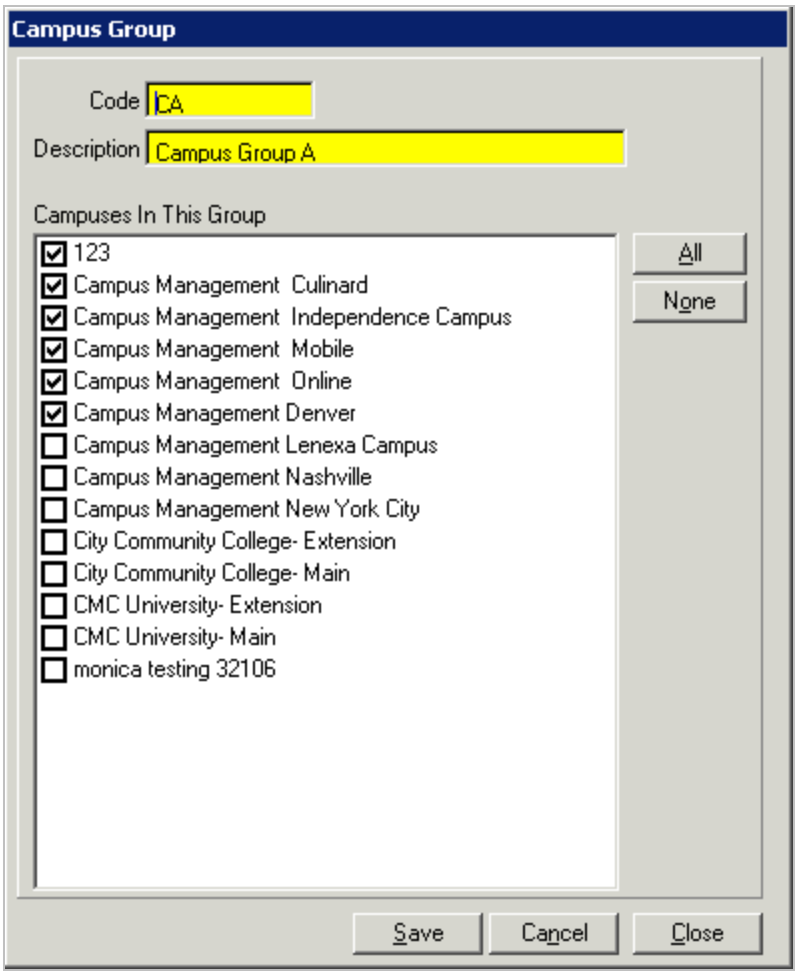
1. On the Campus Groups tab of the Campus Setup form, click the campus group to be deleted.
2. Click **Delete**. A confirmation message is displayed. Click **Yes**.

CampusVue Finance, HR & Payroll

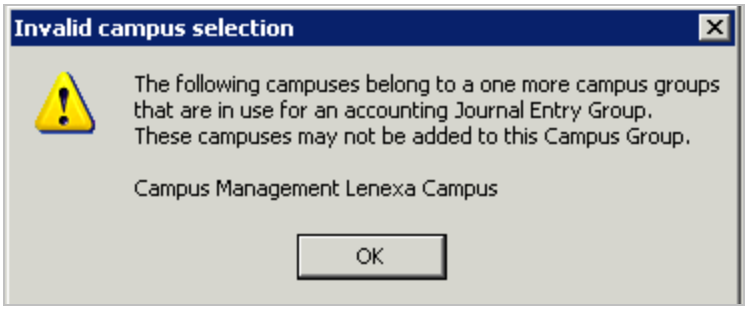
When CampusVue Finance, HR & Payroll is integrated with CampusNexus Student, Journal Entry Groups are set up per fiscal year and ledger and associated with campus groups. A campus can only be associated with one journal entry group for a fiscal year. The Journal Entry Group form validates this business requirement.

To set up campus groups:

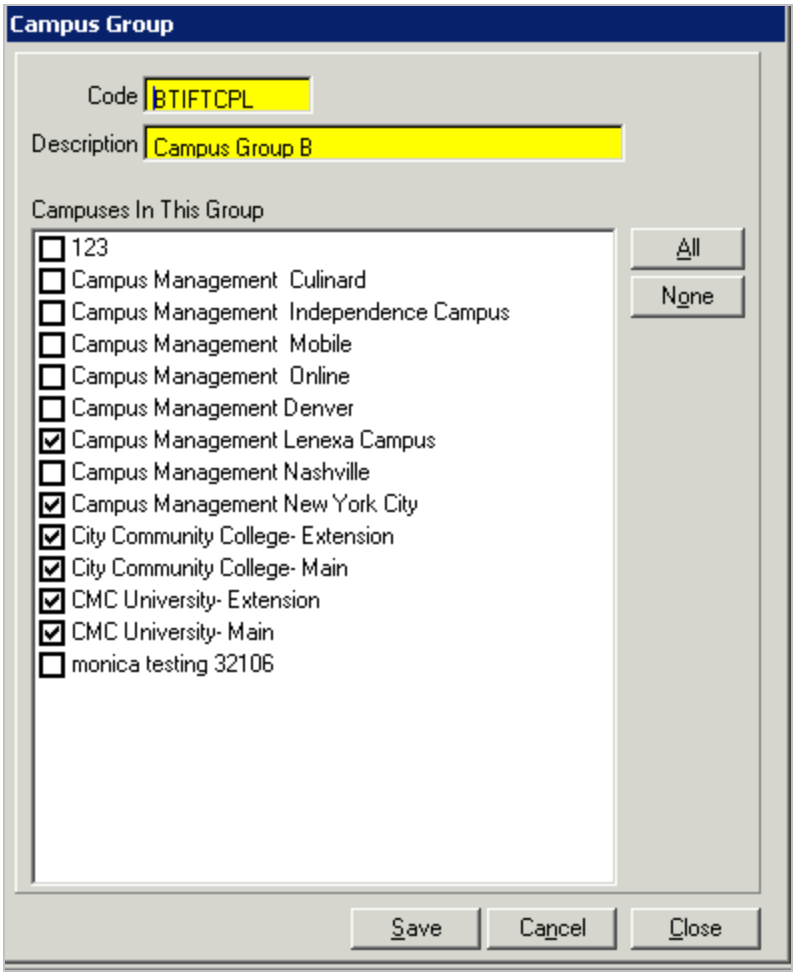
1. Navigate to **Setup > Campus Locations > Campus Groups** (tab) **> Add/Edit** (buttons).
2. Select a campus group, e.g., Campus Group A.



In this example, the user is attempting to add 'Campus Management Lenexa Campus' and 'Campus Management New York City' to Campus Group A. These campuses are assigned to Campus Group B, which is linked to a Journal Entry Group associated with the same fiscal year. Since these campuses are assigned to Campus Group B that is associated with a different Journal Entry Group with the same fiscal year as the selected Campus Group A, CampusNexus Student will not add the campuses to the campus group and the following message will appear.



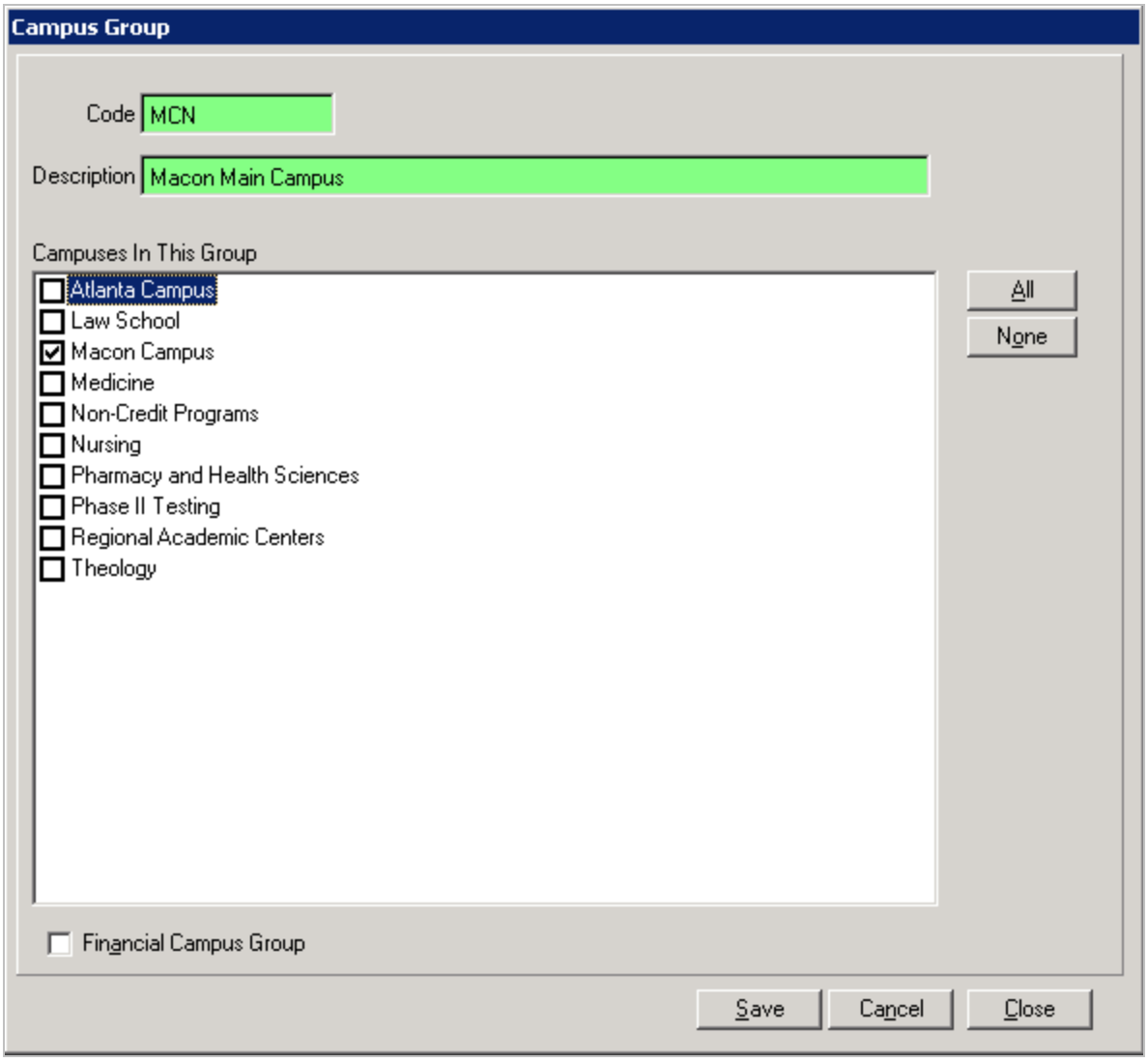
3. Click **OK**. You will return to the Campus Groups selection form and these campuses will not be added to the Campus Group. However, any other campuses selected that do not violate the restriction will be successfully linked to the campus group.
4. Select Campus Group B. Note that 'Campus Management Lenexa Campus' and 'Campus Management New York City' are assigned to Campus Group B.



When the fiscal year is the same for the journal entry groups associated with **Campus Group A** and **Campus Group B**, a campus can only be linked to one campus group for a fiscal year.

CampusNexus Finance, HR & Payroll

When CampusNexus Finance, HR & Payroll is integrated with CampusNexus Student, the Campus Group form displays a check box labeled **Financial Campus Group**. Selecting this check box tells the system to combine all transactions associated with this campus group into the same Journal Entry. A campus can only be part of one Financial Campus Group at a time.



See Initial Configuration of CampusNexus Finance, HR & Payroll.

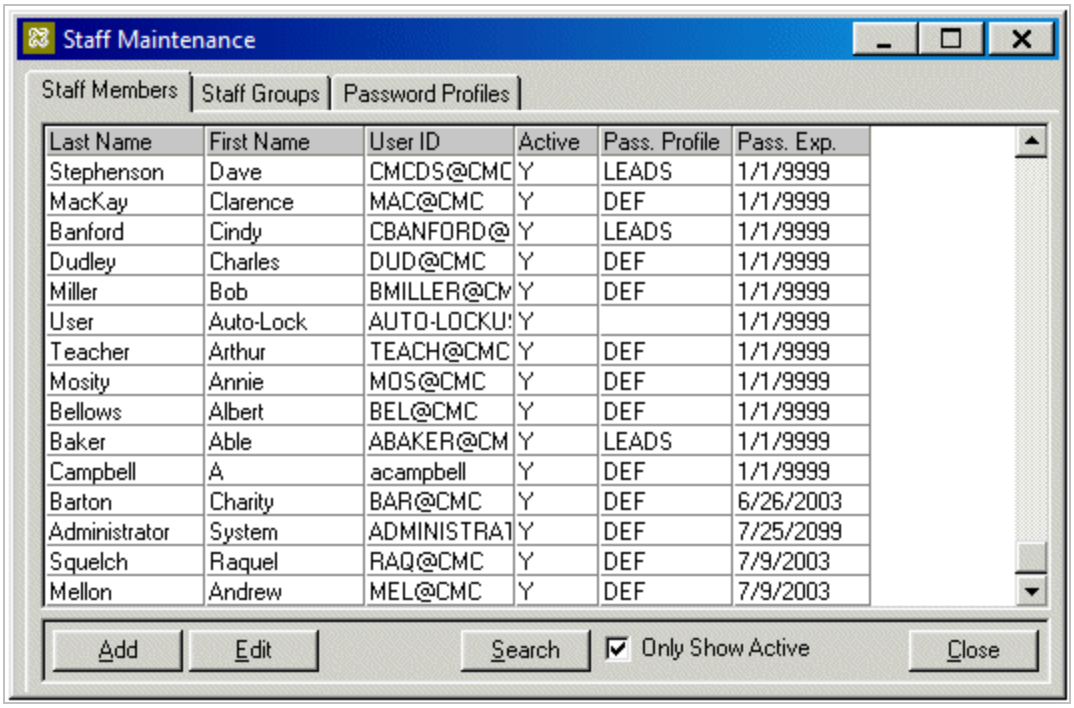
Staff Maintenance Form

The system administrator (SA) can set up and modify staff members and staff groups for your institution.

To set up and modify Staff Members and Staff Groups:

1. As a system administrator, navigate to **Setup > Staff**. The Staff Maintenance form is displayed.

   - If the authentication modes **Use CampusNexus Student Database** or **Use Windows Login (Non-AD)** are enabled, the Staff Maintenance form contains the Staff Members, Staff Groups, and Password Profiles tabs.
   - If passwords and password rules are controlled by **Active Directory**, the Password Profiles tab does not appear, and the 'Pass. Profile' and 'Pass. Exp' columns do not appear on the Staff Members and Staff Groups tabs.



2. The **Staff Members** tab presents a list of staff members. In addition to names and user IDs, the tab displays the following information:

   - The Active column indicates the staff member's status (Y = active, N = inactive). This setting is derived from the Staff Information form.
   - The Pass. Profile column lists the active Password Profile for that user.
   - The Pass. Exp. column lists the current password's expiration date.

   On the Staff Members tab, you can perform the following actions:

   a. Select **Only Show Active** to display only active staff members. Clear the check box to view all staff members.

   b. Click **Add**, **Edit**, or **Search** to add, edit, or search for a staff member. You cannot delete a staff member;

however, you can **deactivate** a staff member to prevent the staff member from having new work assigned.

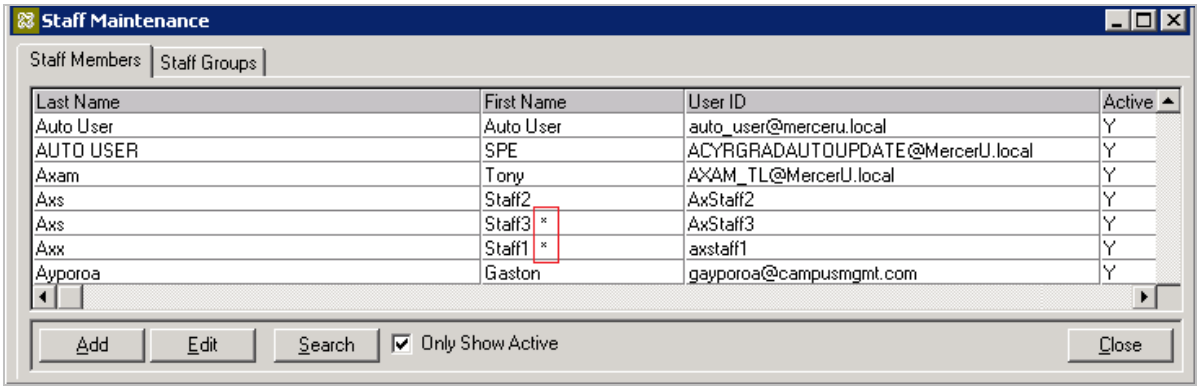
Note: Making a staff member inactive does not prevent the person from logging into the system. The only way to prevent a staff member from logging into the system is to remove (clear) the person's password.

All staff members who use CampusNexus Student must be recorded in the Staff Maintenance form. Even staff members who will not use CampusNexus Student directly must be entered if they are to be referenced in any way, for example, instructors who are assigned to class sections but do not need access to CampusNexus Student. If a staff member needs to be referenced, the staff member is assigned a User ID but not a password. Without a password, a staff member cannot access the system.

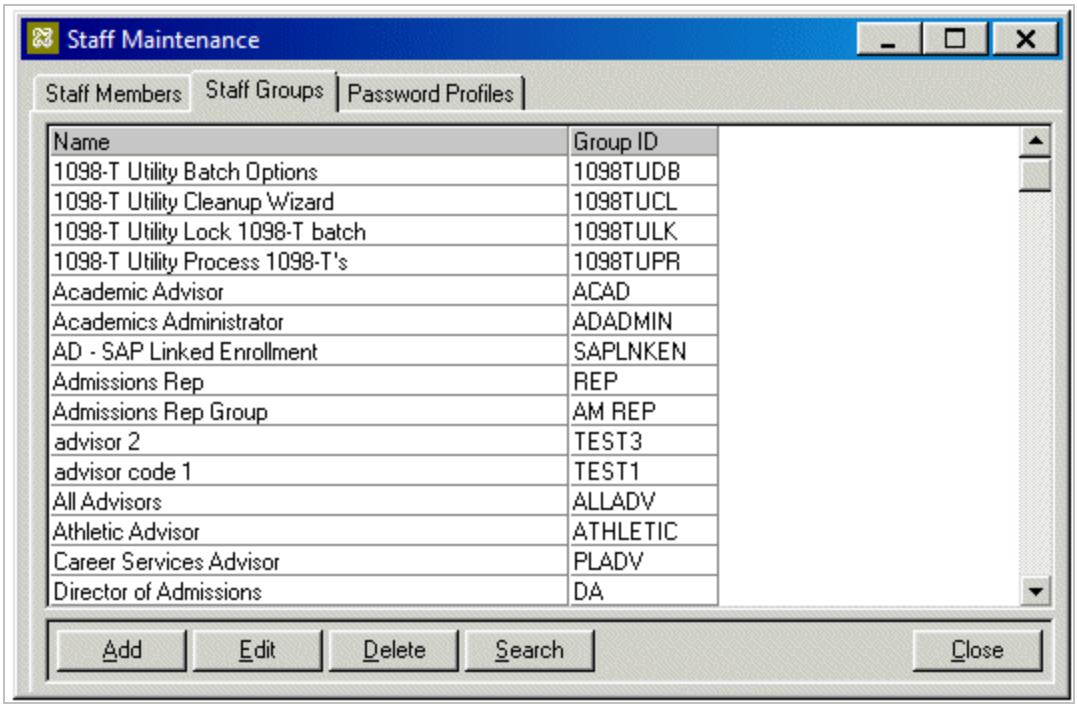
See Assigning Staff Permissions.

See Security to set up security rights for staff members and groups.

If Faculty Management Integration for CampusNexus Finance, HR & Payroll is enabled (see Academic Records Settings - General Tab), Instructors created in CampusNexus Finance, HR & Payroll are marked with an asterisk (*) as shown below. These Instructors must be assigned to Campus Groups in CampusNexus Student. See Assigning Staff Permissions.



3. Click the **Staff Groups** tab to add, edit, delete, and search staff groups. Assign staff members to groups based on the department they are in and the work they do. Groups are given certain privileges based on the needs of the group when performing their administrative duties. These permissions include the permissions to access, view, or write data in CampusNexus Student.



Some staff groups are required by CampusNexus Student. These groups may not be deleted; however, there is no requirement that you must assign staff members to any of these groups except the System Administrator group.

- System Administrator
- Director of Admissions
- Admissions Reps
- Financial Aid Advisors
- Academic Advisors
- Instructors
- Career Services Advisors

At least one person must be assigned to the System Administrator group. A default person with the name "Administrator" is delivered with CampusNexus Student. After you assign another person to the System Administrator group, you can delete the default Administrator.

The Staff Group AD - SAP Linked Enrollment allows staff members to link enrollments using the Enrollment Wizard and the Re-Entry Wizard, as long as the SAP Enrollment Linking? Academic Records Setting is configured to Yes.

4. Click the **Password Profiles** tab to access the Password Profile form.

Note: When you edit a staff member or staff group, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.

Active Directory Integration with CampusNexus Finance, HR & Payroll

If Faculty Management Integration for CampusNexus Finance, HR & Payroll is enabled (see Academic Records Settings - General Tab), Instructors (Staff/Users) can be created in CampusNexus Student or in CampusNexus Finance, HR & Payroll. Active Directory integration between the two systems ensures that every Instructor that is intended to be created in CampusNexus Student is mapped to a User in CampusNexus Finance, HR & Payroll.

If the CampusNexus Finance, HR & Payroll User is not expected to be a CampusNexus Student application user, the CampusNexus Finance, HR & Payroll User is just a domain user with no application permissions for CampusNexus Student.

The Active Instructor flag in CampusNexus Finance, HR & Payroll is synchronized with the CampusNexus Student Staff (Instructor) record.

Faculty Members can be imported into CampusNexus Finance, HR & Payroll with User Domain Details, so that at the end of import, the CampusNexus Finance, HR & Payroll Instructors are mapped to CampusNexus Student Staff.

The Instructor record in CampusNexus Finance, HR & Payroll must include the domain details. CampusNexus Finance, HR & Payroll attempts to send the Instructor record to CampusNexus Student when the domain details are present. CampusNexus Student checks for the existence of the domain details. If found, the First Name & Last Name are compared with CampusNexus Finance, HR & Payroll.

- If there is a mismatch in the First Name & Last Name, a message about the mismatch is displayed in CampusNexus Finance, HR & Payroll.
- If there is a match in the First Name & Last Name, the CampusNexus Student Staff and CampusNexus Finance, HR & Payroll Instructor are mapped.
- If the user domain details never existed in CampusNexus Student, a new Instructor (Staff) is created.

As part of the mapping, CampusNexus Student sends the Staff ID to the CampusNexus Finance, HR & Payroll Instructor record. For an existing Instructor, CampusNexus Student sends a list of Campuses.

Changes in domain details or changes in the related CampusNexus Finance, HR & Payroll User go through the same synchronization and validation flow. The following rules apply:

- Once a domain is assigned to an Instructor, the domain details cannot be removed. This means a Staff/Instructor user can be replaced but not removed.
- A visual indicator is displayed in CampusNexus Finance, HR & Payroll for records that are not synchronized.
- Domain details cannot be edited in CampusNexus Student.
- Duplicate domain details cannot be saved against Users (in CampusNexus Finance, HR & Payroll and CampusNexus Student).

Sample Scenarios:

A. Hari is an Instructor. His User Principal Name (UPN) in the Active Directory database is harihara@cmc.com. When Faculty Management Integration is enabled, CampusNexus Finance, HR & Payroll sends the domain details to CampusNexus Student, and CampusNexus Student checks for the UPN in the Staff list.
    - If the UPN is not found, a new Instructor (Staff) record is created in CampusNexus Student. The message *"Instructor created in CampusNexus Student"* is displayed in CampusNexus Finance, HR & Payroll.
    - If the UPN is found, the Instructor is mapped to the Staff record for Hari. The Campuses associated with his record are sent to CampusNexus Finance, HR & Payroll. The message *"Instructor mapped in CampusNexus Student"* is displayed in CampusNexus Finance, HR & Payroll.
    - If UPN is found against Staff member 'Ben', the message *"Staff mapping failed because of mismatch in First Name & Last Name between CampusNexus Finance, HR & Payroll and CampusNexus Student"* is displayed when the administrator attempts to link the records to harihara@cmc.com. The records are not synchronized and the domain details are not saved.

B. After the initial synchronization Hari's name is changed to Ben. When Faculty Management Integration is enabled, CampusNexus Finance, HR & Payroll sends the Active Directory details to CampusNexus Student, and the name is changed in CampusNexus Student.

C. Hari's UPN is changed from harihara@cmc.com to hari@cmc.com. When Faculty Management Integration is enabled, CampusNexus Finance, HR & Payroll sends the Active Directory details to CampusNexus Student, and

CampusNexus Student checks for hari@cmc.com in the Staff list.

- If the UPN is not found, the existing domain details of the mapped Staff record are changed from hari-hara@cmc.com to hari@cmc.com.
- If the UPN is found against Staff member Ben, a message is displayed indicating that the domain details cannot be changed.

Staff Information Form

The fields and tabs available on the Staff Information form vary depending on whether the Central Security Application is used to set up and maintain end-user security. Refer to Central Security Application Not Used, otherwise see Using Central Security Application.

Use the General tab on the Staff Information form to set up the Code, Name, and status (active/inactive) of the staff member,

To enter or change general information for a staff member:

1. Navigate to **Setup** > **Staff**. The Staff Maintenance form is displayed.

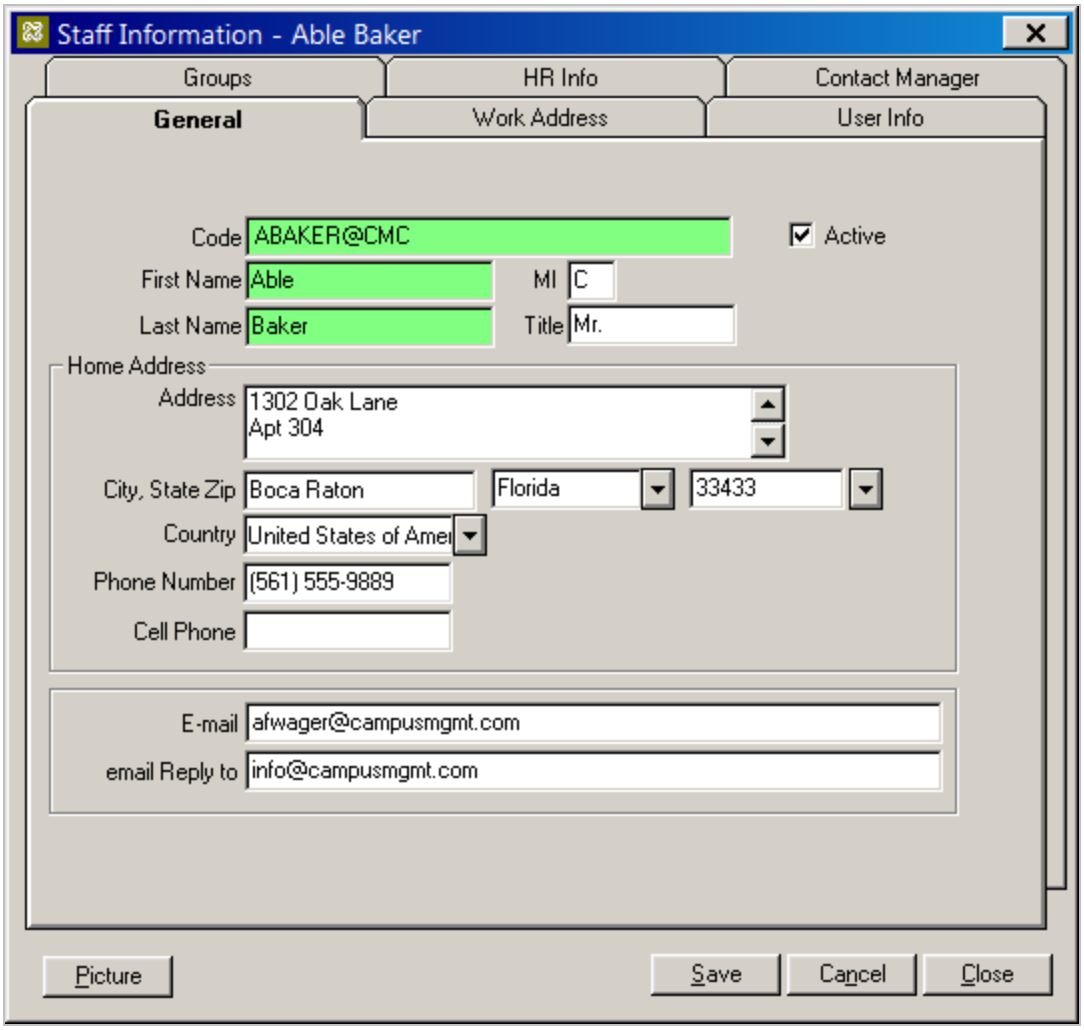
   Select a record on the Staff Members tab and click **Add** or **Edit**. The Staff Information form is displayed.

   When you add a staff member, a blank Staff Information form is displayed; otherwise, the form displays previously entered information pertaining to the staff member.

   ### Central Security Application Not Used

   When the Central Security Application is not used, the Staff Information form contains the following tabs:

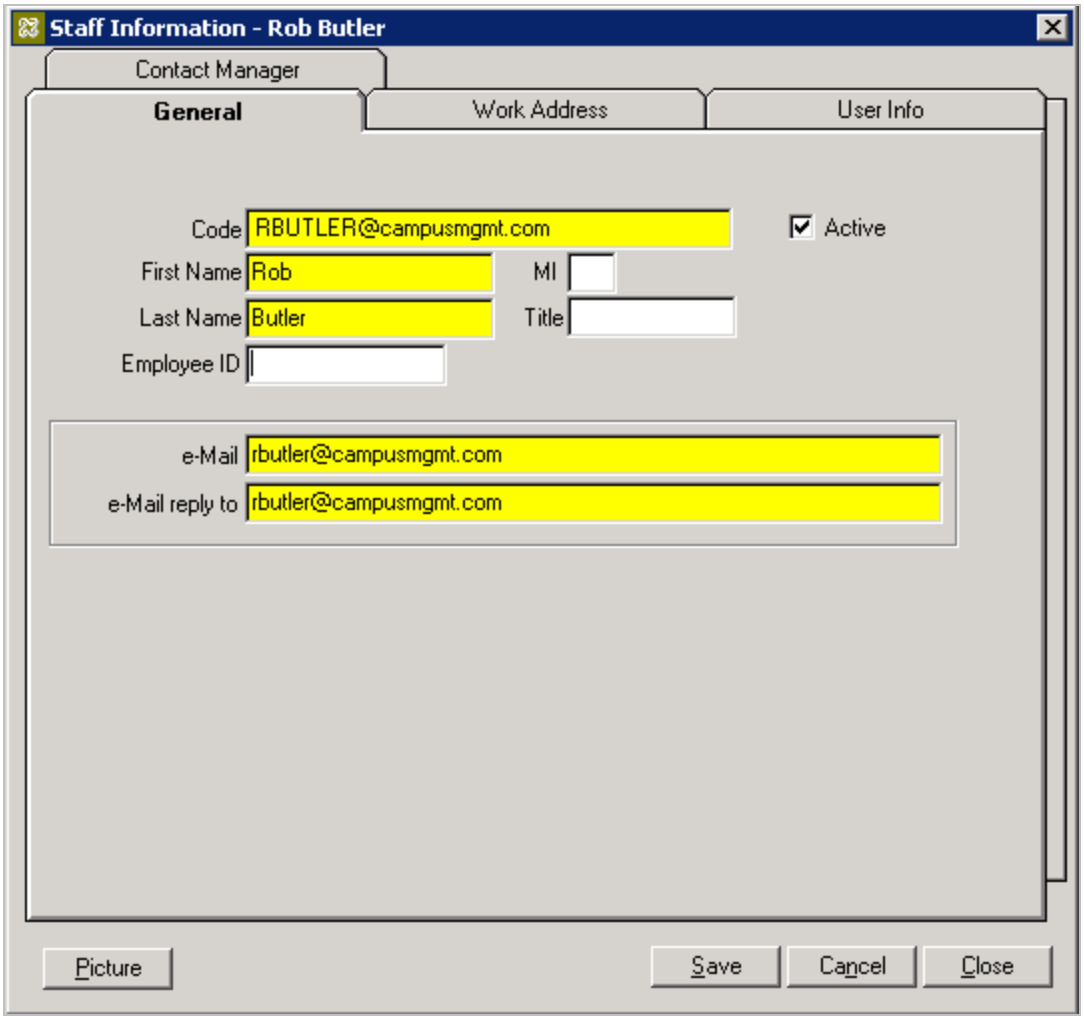
   - General
   - Work Address
   - User Info
   - Groups
   - HR Info
   - Contact Manager



Using Central Security Application

When the Central Security Application is used, the Staff Information form contains the following tabs:

- General
- Work Address
- User Info
- Contact Manager



2. Specify the staff member's **Code**, **Name**, and other pertinent information.
3. If this is an active staff member, be sure the **Active** check box is selected.

   Note: A staff member's status can be changed to inactive to prevent the staff member from having new work assigned. For further details on the impact of active/inactive status, refer to the following topics:

   - Displaying active/inactive status of staff members: Staff Maintenance Form
   - Assigning activities to staff members: Contact Manager Form
   - Displaying names of staff members for Admissions Rep purposes: Admissions Rep Maintenance
   - Displaying names of staff members for Instructor purposes: Instructor Maintenance
   - Automatic triggering of activities assigned to advisor groups: Add an Auto Activity

   Making a staff member inactive does not prevent the person from logging into CampusNexus Student. The only way to prevent a staff member from logging into the system is to remove (clear) the person's password.
4. Click **Picture** to view or upload a picture of the staff member.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Note: When you edit a staff member or staff group, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.

Searching for Staff Members

The search engine in CampusNexus Student enables system administrators to manage staff lists at specific campuses. System administrators can search for staff members by specifying search parameters on the Search Staff form.

To search for a staff member:

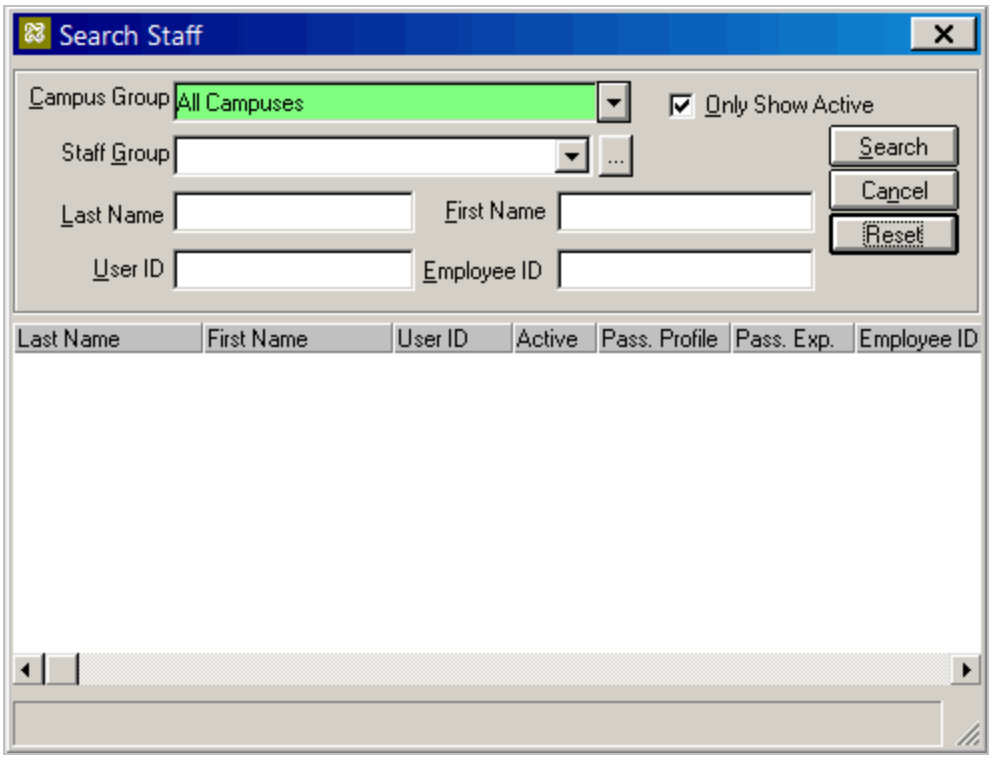
1. Click the Search icon on the Main toolbar, and select **Search Staff**.

   - OR -

   Right-click in the work area and select **Find Staff**.

   The Search Staff form is displayed.

   Note: The Search Staff and Find Staff options are enabled only if you have view permissions on Setup > Security and Setup > Staff.



2. To perform a search, select or enter any (at least one) or all of the following parameters:

   - Campus Group
   - Staff Group
   - Last Name
   - First Name
   - User ID
   - Employee ID

   Note: If you previously used the search option, CampusNexus Student retains your search criteria. Click the **Reset** button to clear previous search parameters.

3. Click **Search**. The search results are displayed in the grid.

Note: The selection of fields in the staff search results can be customized. For more information, see Customizing Search Results.

4. Double-click a record in the grid. The Staff Information form display the details of the selected record. You can modify the record.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.
6. Click **Cancel** to close the Search form

Adding or Editing a Staff Member

To add or edit a staff member:

1. Navigate to **Setup > Staff**. The Staff Maintenance form is displayed.
2. To add a new staff member, click **Add** on the Staff Maintenance form. A blank Staff Information form is displayed.
3. To modify a staff member's information, select a record and click **Edit**. The Staff Information form is displayed containing the staff member's existing information.

   Note: When you edit a staff member or staff group, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.
4. Fill out the information within all Staff Information form tabs that is applicable to the staff member.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Staff Information - General Tab - Deactivating a Staff Member

You can deactivate staff members who have been set up by mistake and have no tasks, historical references, or student-related assignments. Deactivating is also highly recommended for staff members who have history accumulated in CampusNexus Student, but are no longer active users.

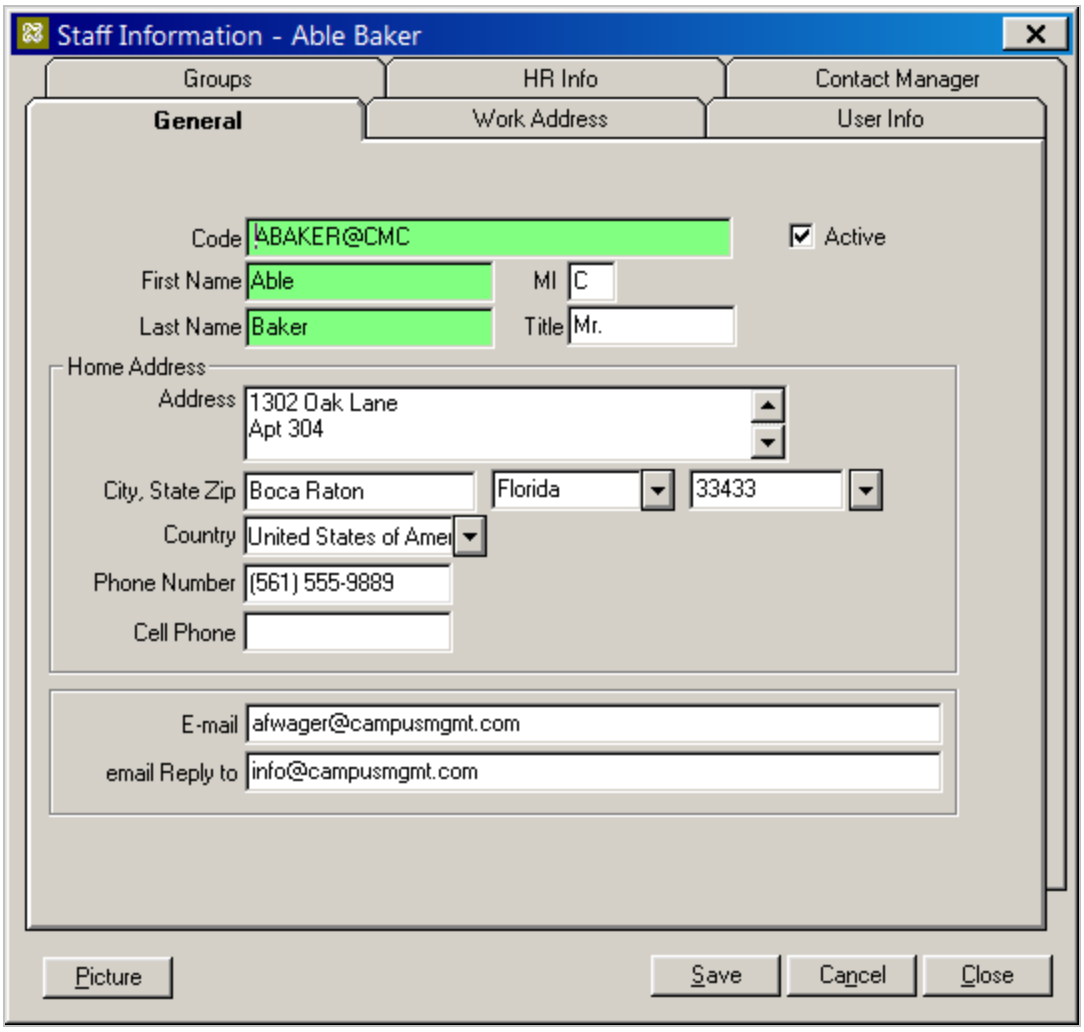
Note: Deactivating a staff member does not prevent the person from logging into CampusNexus Student. To prevent a staff member from logging into the system, lock the person's account. For more information, see Assigning Staff Permissions.

To deactivate a staff member:

1. Navigate to **Setup** > **Staff**. The Staff Maintenance form is displayed.

   Select a record on the Staff Members tab and click **Add** or **Edit**. The Staff Information form is displayed.

2. Select the **General** tab.



3. Clear the **Active** check box.
4. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Note: When you edit a staff member or staff group, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.

Deleting a Staff Member

Staff members cannot be deleted using the CampusNexus Student user interface. Instead of deleting a staff member, deactivate the staff member. Thus, you do not risk disturbing historical information in your system. You can also remove the staff member's password. This prevents the person from logging into CampusNexus Student while you keep a record of the person's previous involvement with the system.

Note: Clients who need to delete a staff member can request a delete script from Support (1-800-483-9106).

Staff Information - General Tab - Pictures

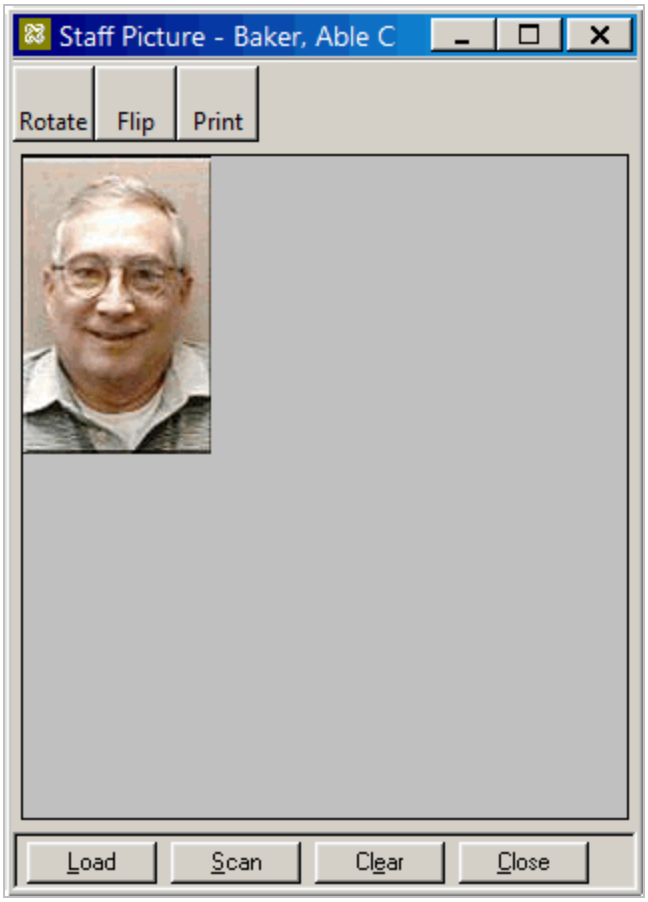
You can import staff pictures into CampusNexus Student and display them when the need arises. When they are imported, the pictures are stored as bit maps in the CampusNexus Student database.

To import staff pictures:

1. Navigate to **Setup** > **Staff**. The Staff Maintenance form is displayed.

   Select a record on the Staff Members tab and click **Add** or **Edit**. The Staff Information form is displayed.

2. On the General tab, click the **Picture** button. If a picture has already been imported for the staff member, it is displayed on the form.



   Note: You can edit, clip, and size, the picture before you load the file into CampusNexus Student. Once it is imported, you cannot change anything except its orientation.

3. Click **Load** to import a picture from a file on disk. The file must have ".bmp" as its extension. When you click Load, CampusNexus Student opens a directory search form. Use it to find the image you want to import.

4. Click **Scan** to open your scanner software and import an image directly from a scanner attached to your computer or on your network. When you click Scan, CampusNexus Student looks for "Twain" compliant applications on your PC. If there is more than one, choose one to open. When the image is scanned, select an option in the scanner application to export the image to CampusNexus Student.

5. Click **Clear** to clear an existing picture of the staff member from the form and from the database.

6. Click **Close** to close the Staff Picture form and save any changes you have made.
7. Click **Rotate** to rotate the image on the form 90 degrees.
8. Click **Flip** to turn the picture upside-down. This is the same as rotating it 180 degrees.
9. Click **Print** to print a copy of the staff member's picture. The picture is enlarged to just fit on an 8.5" x 11" sheet of paper.

Staff Information - Groups Tab

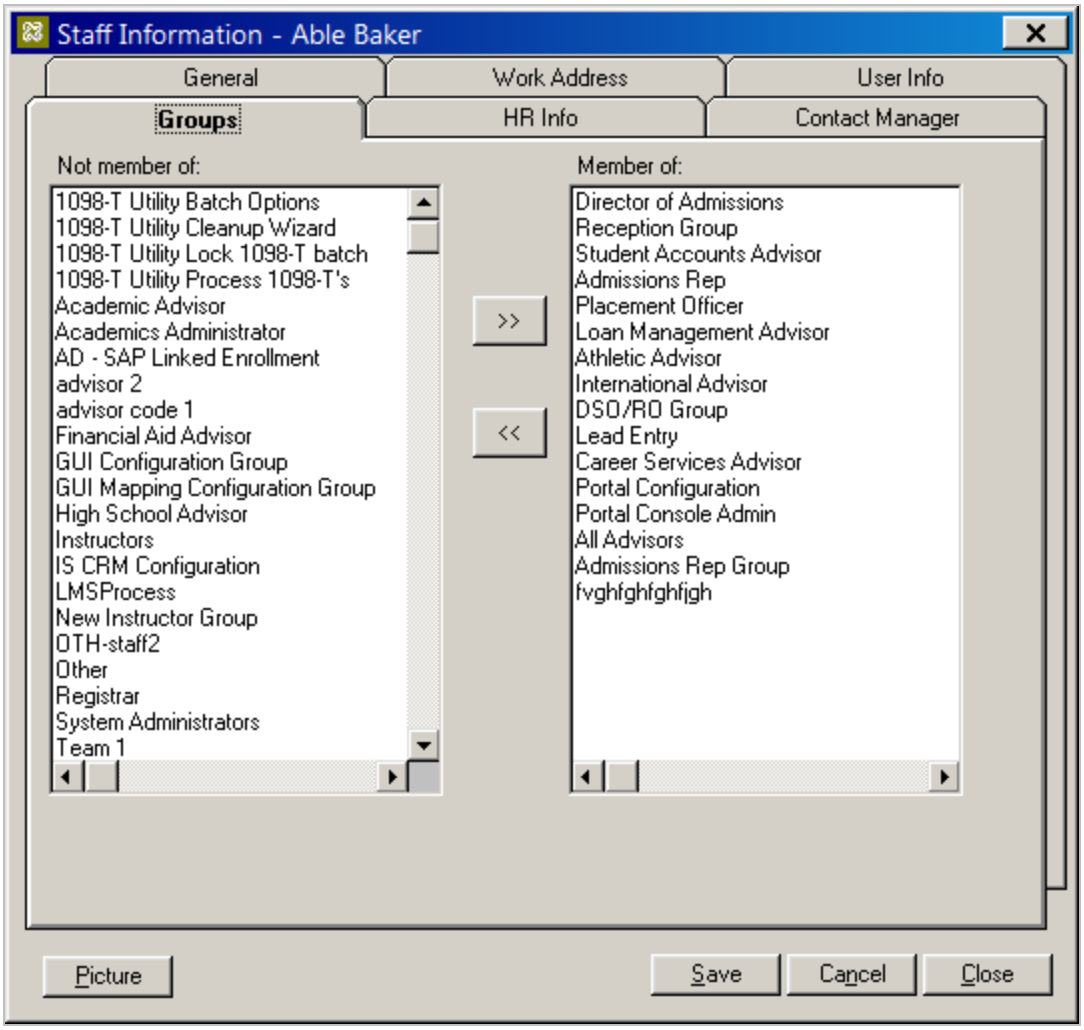
Use the Groups tab on the Staff Information form to display the groups to which a staff member is assigned or to assign a new staff member to one or more staff groups. A staff member can belong to several groups.

To assign the staff member to a group:

1. Navigate to **Setup** > **Staff**. The Staff Maintenance form is displayed.

   Select a record on the Staff Members tab and click **Add** or **Edit**. The Staff Information form is displayed.

2. Select the **Groups** tab. The 'Member of' list, displays all the groups to which the selected staff member belongs.



3. Click a group name in the **Not member of** box on the left to highlight it.
4. Click the **>>** button to move the group name under **Member of** in the right-hand box.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

To remove the staff member from a group:

1. Click a group name in the **Member of** box on the right to highlight it.
2. Click the **<<** button to move the group name under **Not member of** in the left-hand box.
3. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Note: When you edit a staff member or staff group, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.

Staff Information - HR Info Tab

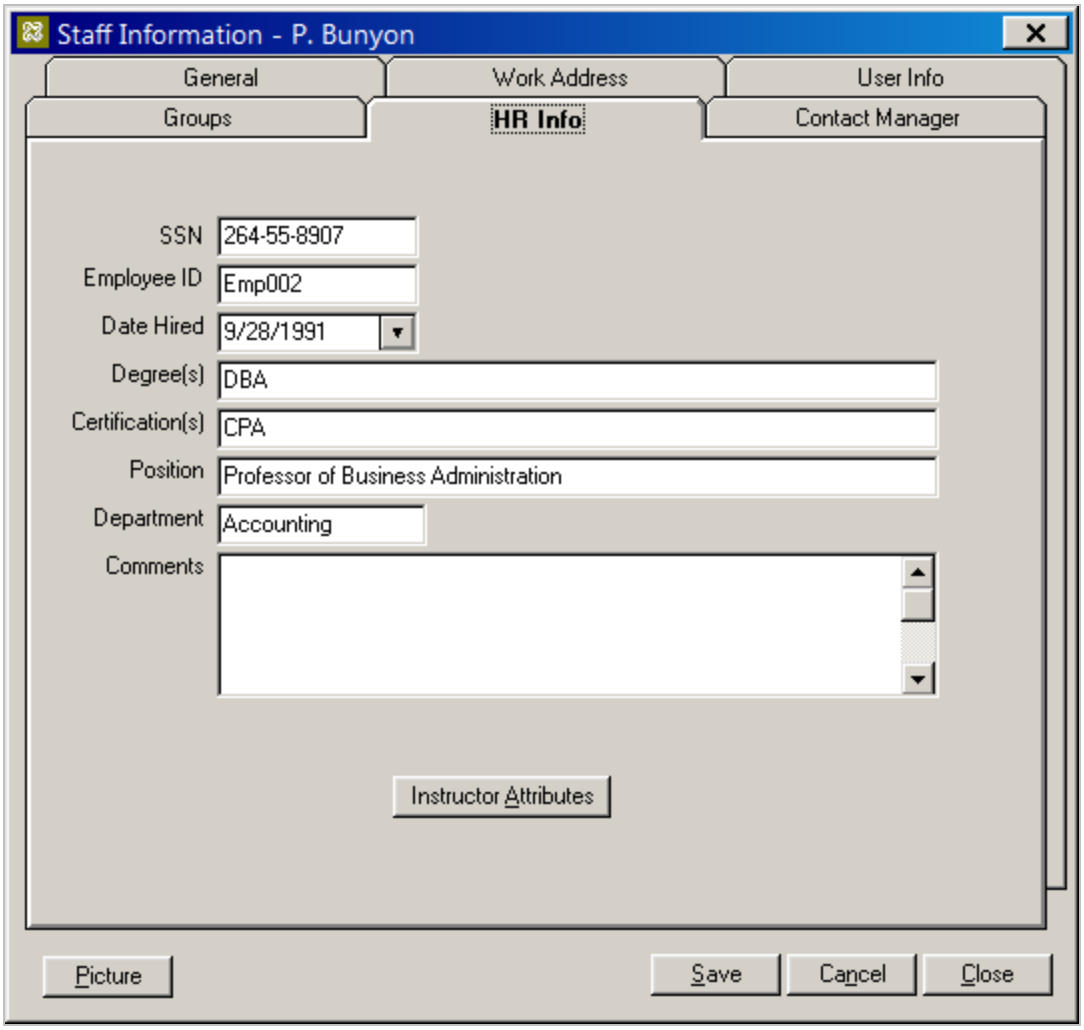
Use the HR Info tab on the Staff Information form to enter human resources information about a staff member, such as SSN, hire date, qualifications, position, and department.

To enter HR information for a staff member:

1. Navigate to **Setup** > **Staff**. The Staff Maintenance form is displayed.

   Select a record on the Staff Members tab and click **Add** or **Edit**. The Staff Information form is displayed.

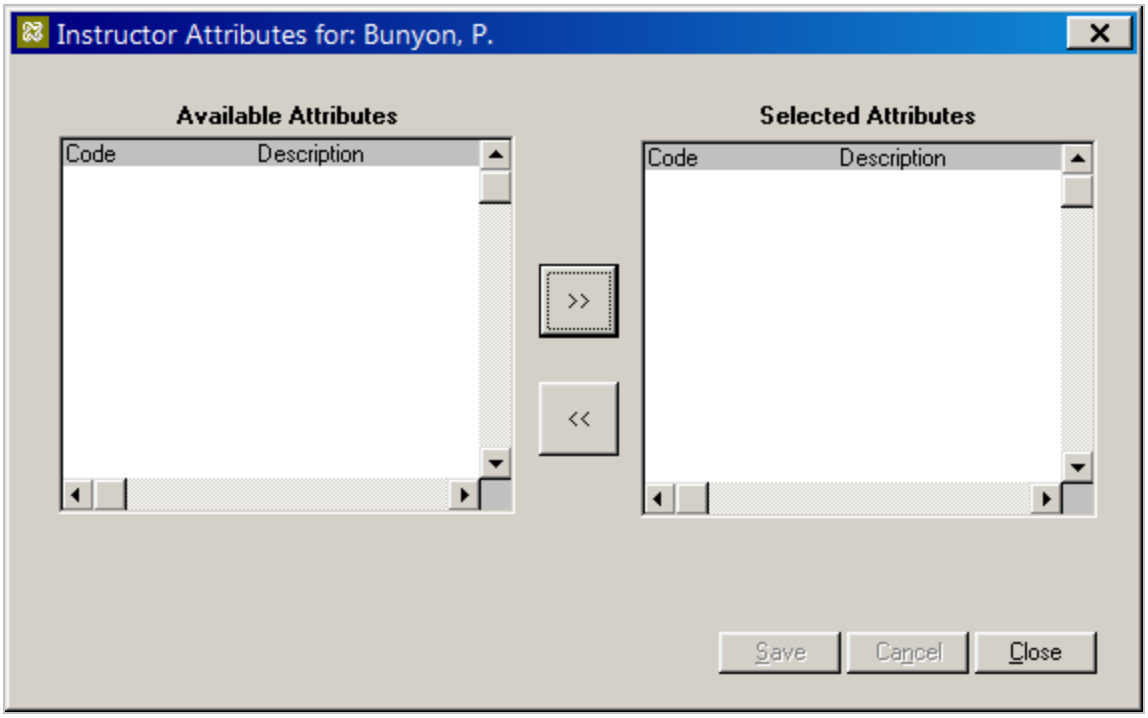
2. Select the **HR Info** tab.



3. Complete the fields on this tab. For more information, see Field Descriptions.

4. Click the **Instructor Attributes** button to select and deselect default attributes for an instructor. Click the **>>** button to add the attributes or click **<<** to remove them. The selected attributes set will appear in the course section when the instructor is selected.

   Note: The Instructor Attributes button is visible only if the selected staff member belongs to the staff group with code 'TEACH.'



5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Note: When you edit a staff member or staff group, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.

Field Descriptions

Field	Description
SSN	The staff member's Social Security Number
Employee ID	The staff member's employee identification
Date Hired	The date the staff member was hired
Degree(s)	Degrees the staff member holds
Certification(s)	Certifications that apply to this staff member
Position	The staff member's position
Department	The staff member's department
Comments	A comment of up to 3,000 characters

Staff Information - Contact Manager Tab

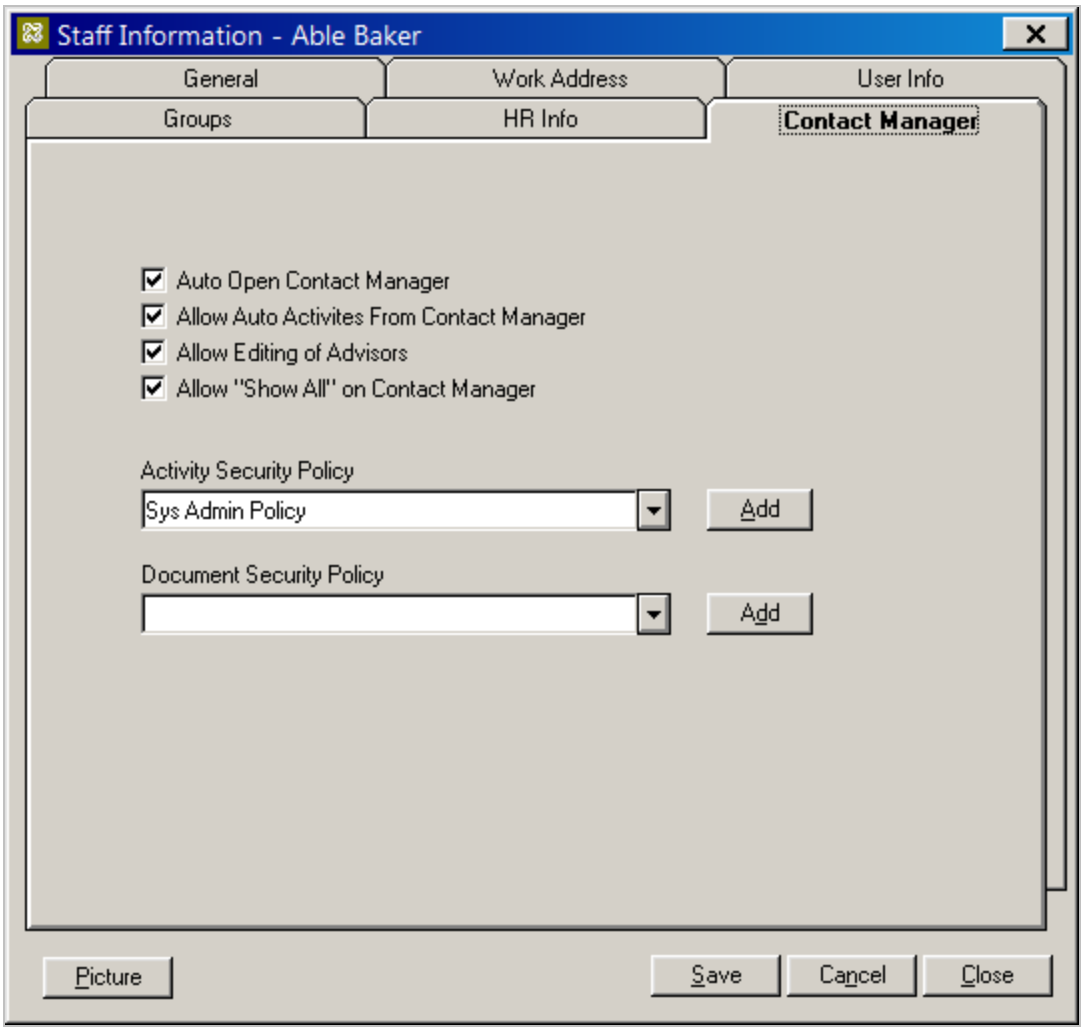
Use the Contact Manager tab of the Staff Information form to enter information about how staff use certain Contact Manager options. 'Staff' may refer to a staff member or group below depending on whether the Contact Manager tab was accessed via the Staff Information form (Staff Member) or the Setup Template form (Staff Group).

To assign Contact Manager options to a staff member:

1. Navigate to **Setup** > **Staff**. The Staff Maintenance form is displayed.

   Select a record on the Staff Members tab and click **Add** or **Edit**. The Staff Information form is displayed.

2. Select the **Contact Manager** tab.



3. Complete the fields on this tab. For more information, see Field Descriptions.
4. Click the Picture button (Only available on the Staff Information form) to access the staff member's picture.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Note: When you edit a staff member or staff group, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.

Field Descriptions

Field	Description
Auto Open Contact Manager.	Select this option if you want Contact Manager to be opened at each logon.
Allow Auto Activities From Contact Manager	Select this option if you want the user to receive automatically assigned activities from Contact Manager.
Allow Editing of Advisors	Select this option to give the staff member permission to edit students advisors.
Allow "Show All" on Contact Manager	Select this option to display the All check box on the staff member's Contact Manager form. If the check box is enabled, the staff member can view all pending activities for all staff members.
Activity Security Policy	Select a policy and click **Add** to apply the policy to the staff member. For more information, see Activity Policies Setup.
Document Security Policy	Select a policy and click **Add** to apply the policy to the staff member. For more information, see Document Policies Setup.

Staff Information - Work Address Tab

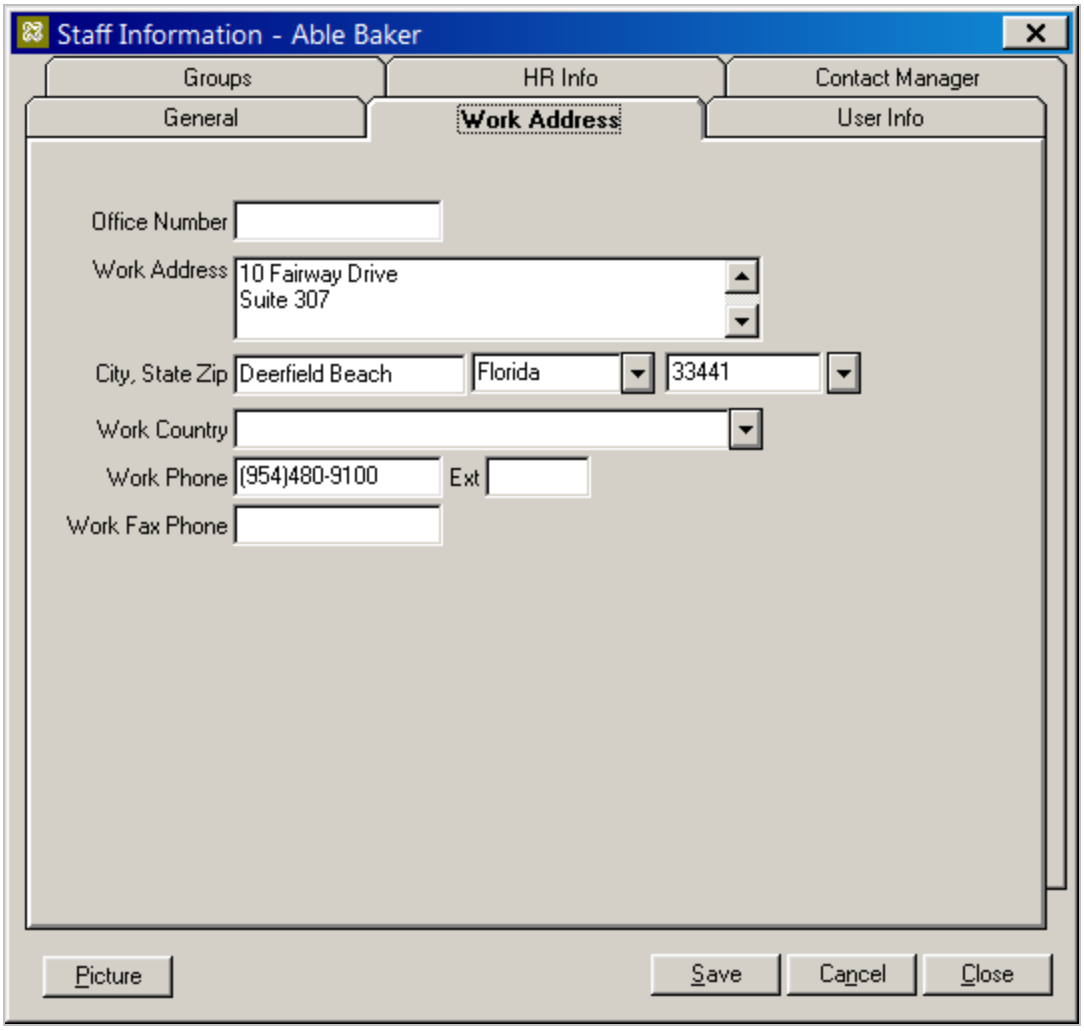
Use the Work Address tab on the Staff Information form store information about the staff member's work address.

To add or change work address information for a staff member:

1. Navigate to **Setup** > **Staff**. The Staff Maintenance form is displayed.

   Select a record on the Staff Members tab and click **Add** or **Edit**. The Staff Information form is displayed.

2. Select the **Work Address** tab.



3. Specify appropriate information in the following fields:

   - Office Number
   - Work Address
   - City
   - State
   - ZIP
   - Work Country
   - Work Phone

- Ext (extension)
- Work Fax Phone

4. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Note: When you edit a staff member or staff group, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.

Assigning Staff Permissions

The User Info tab on the Staff Information form contains information about a staff member's permissions in CampusNexus Student. The subtabs (see Reference topics) contain permissions pertaining to General settings, Student Accounts, Academic Records, Career Services, Financial Aid, Admissions, and Housing (if Housing is enabled in CampusNexus Student).

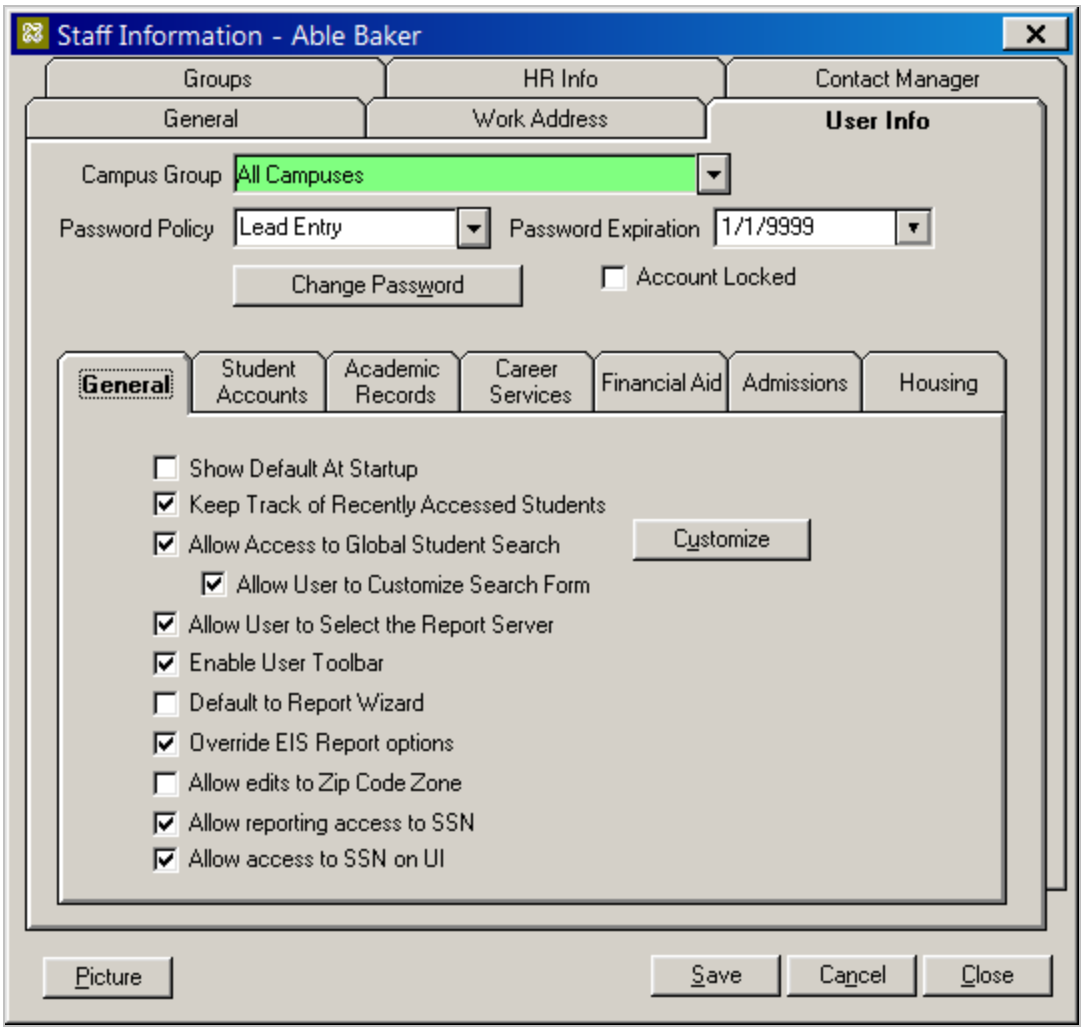
The User Info tab enables the system administrator to assign a password policy to a staff member, change a password, and lock an account.

To assign a password policy to a staff member:

1. Navigate to **Setup** > **Staff**. The Staff Maintenance form is displayed.

   Select a record on the Staff Members tab and click **Add** or **Edit**. The Staff Information form is displayed.

2. Select the **User Info** tab.



3. **Important!** Select a **Campus Group** to which the staff member belongs.
4. Select a **Password Policy** from a list of available Password Profiles.
5. Change the **Password Expiration** date if you want a date different from the supplied default date.

To change a staff member's password:

1. Navigate to **Setup** > **Staff**. The Staff Maintenance form is displayed.

   Select a record on the Staff Members tab and click **Add** or **Edit**. The Staff Information form is displayed.

2. Select the **User Info** tab.

3. Click **Change Password**. When the Change Password dialog is displayed, enter the new password, and then reenter the new password to confirm the exact characters. The new password must conform to the restrictions already set for the user's password profile.

   If you do not enter a password for a staff member, that person will not have access to the system. The person can be referenced by system users when, for instance, assigning instructors to class sections.

4. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

To lock a staff member's account:

1. Navigate to **Setup** > **Staff**. The Staff Maintenance form is displayed.

   Select a record on the Staff Members tab and click **Add** or **Edit**. The Staff Information form is displayed.

2. Select the **User Info** tab.

3. Select the **Account Locked** check box to prevent the user from logging on to CampusNexus Student.

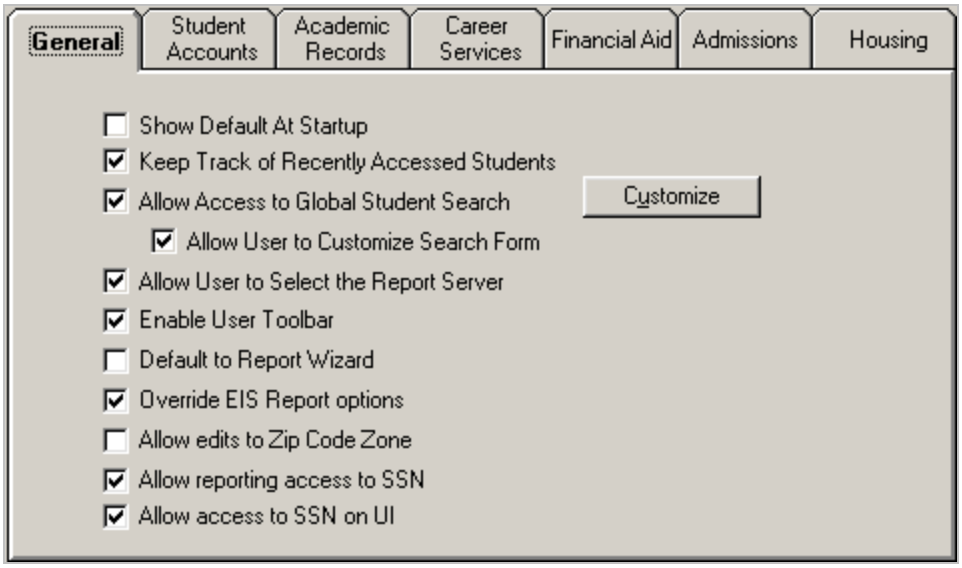
4. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Note: When you edit a staff member or staff group, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.

User Info General Subtab

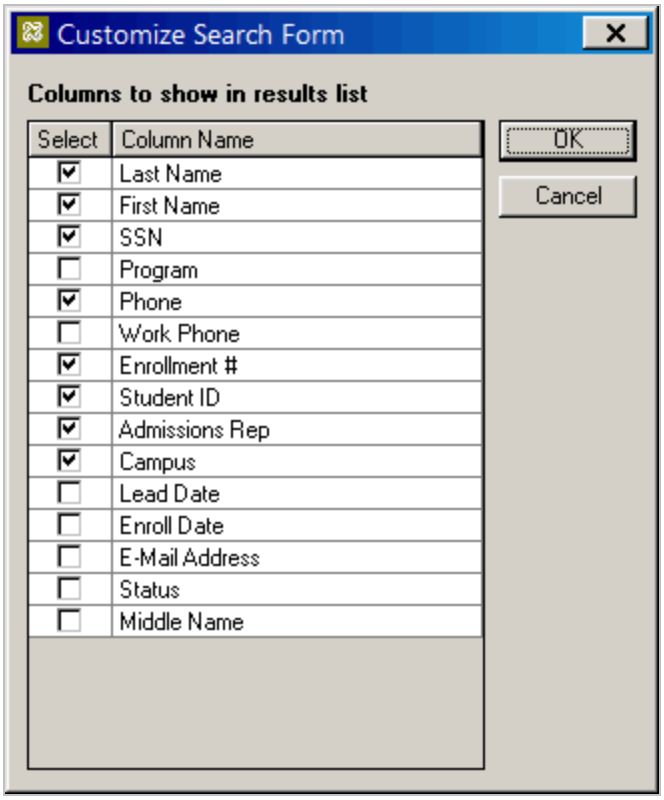
The General subtab on the User Info tab of the Staff Information form and Setup Template form contains general configuration settings for staff members and/or staff groups.

Note: When editing a staff member, all changes are audited. Audit verifications are handled at the database level only and performed through appropriate SQL queries.



Field Descriptions

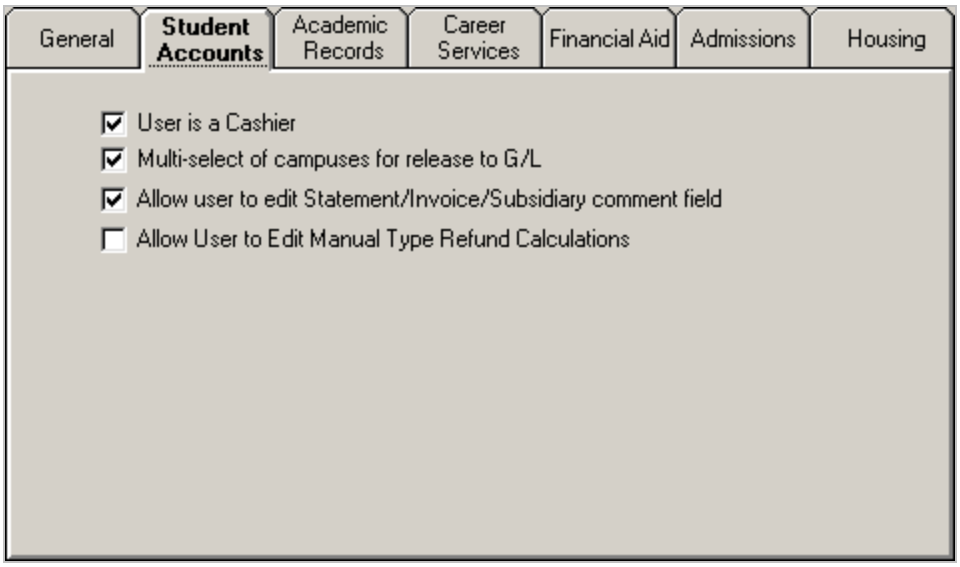
Field	Description
Show Default At Startup	Select this option to allow the staff member to view his or her default settings at each login.
Keep Track of Recently Accessed Students	Select this option to maintain a list of student master records recently accessed by the staff member. The number of student records tracked for each staff member is determined in another system setup option.
Allow Access to Global Student Search	Select this option to allow the staff member unlimited access to the global student search tool for students across all campuses in the system. If a student belongs to a campus that is not in the staff member's campus group, the staff member will see the student in the search results but cannot access the student's data. **Note**: The Allow Global Search system setting must be enabled (see Setup > System > System Settings) . To prevent a staff member from viewing data for students other than those assigned to the staff member in Contact Manager, clear this check box.

Field	Description
Allow User to Customize Search Form	Select this option to allow the staff member to use the Customize button on the Search Form. Click the **Customize** button and select the fields that are displayed in the grid on the search form.  Alternatively, the system administrator (SA) can clear the "Allow User to Customize ..." check box and customize the search form by clicking **Customize** on the User Info form. The same Customize Search Form is displayed for the SA who can then select fields for the staff member to view when searching.
Allow User to Select the Report Server	If this option is selected and the campus that the staff member is signed into has a report server (Setup > Campus Locations > Campus Information > Options), a check box is enabled during report selection to allow the staff member to select/clear the report server. The default value of this check box is set by the report.
Enable User Toolbar	Select this option to allow the staff member to customize the toolbar.
Default to Report Wizard	Select this option to set the report wizard as the default.
Override EIS Report options	Select this option to allow the staff member to change the Executive Summary Report settings to be different than the default settings.
Allow edits to ZIP Code Zone	Select this option to allow the staff member to change the ZIP Code Zone settings on the Inquiry and Applicant forms.

Field	Description
Allow reporting access to SSN	Select this option to allow the staff member to view, print, and export social security numbers (SSNs) for all reports listed under the Reports menu and some reports accessible via the View or Daily menus when clicking the Print button. The student's SSN will be a selectable option from the 'Student ID to Print' drop-down list on the Report Selection form, will appear on the selected report, and will be available for export. This feature does not apply to Custom Reports. This check box is selected by default. To revoke the permission, clear the check box for each staff member or staff group. If the SSN is a specified field on the report and the staff member or staff group does not have permission to view, print, or export the social security number, the phrase "SSN Blocked" is printed on the report instead of the actual social security number. This feature applies to export files as well.
Allow access to SSN on UI	Select this option to allow the staff member to view social security numbers (SSNs) on specific forms and on the Setup Template for Instructor Groups and Admissions Rep Groups. This check box is selected by default. To revoke the permission, clear the check box for each staff member or staff group. **Note**: On the Student Master, view permission for SSNs is based on the Field Level Security, not on this configuration option.

User Info Student Accounts Subtab

The Student Accounts subtab on the User Info tab of the Staff Information form and Setup Template form contains configuration settings that give staff members and/or staff groups permissions to perform functions within the Student Accounts module.



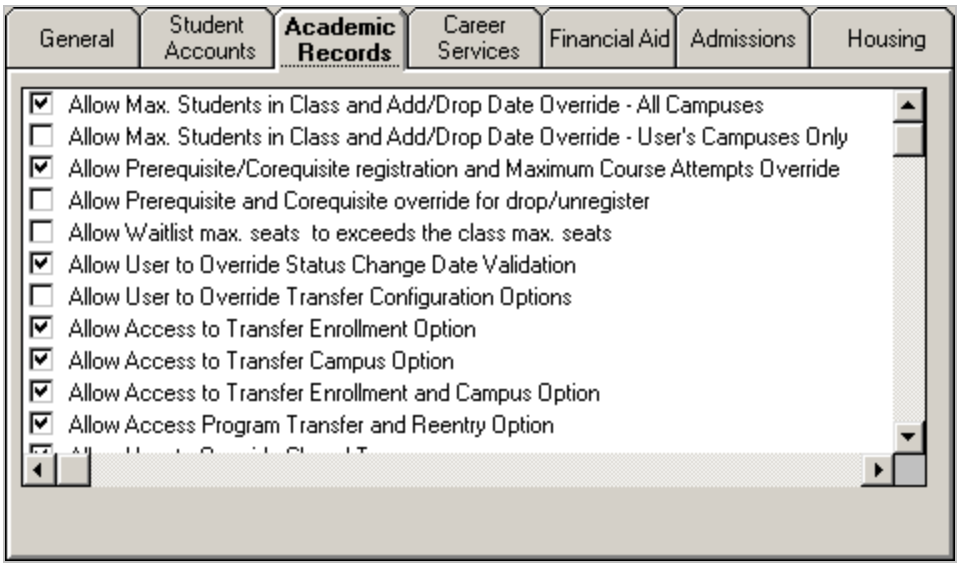
Field Descriptions

Field	Description
User is a Cashier	This check box is displayed only when a campus is enabled for cashiering. Select this option if the staff member must use a cash drawer to post payments. If a Campus is configured to use cashiering, the staff member is prompted to re-authenticate before being allowed to post payment transactions in CampusNexus Student. The Cashier ID check form validates the cashier in Active Directory, when enabled. The form displays the current logged in user and domain as User@domain. The user name field is disabled when using Active Directory. The staff member is required to enter the domain password to continue. If Active Directory is not enabled, the staff member enters the User Name and Password to continue.
Multi-select of campuses for release to G/L.	Select this option to allow the staff member to run the Release to General Ledger for campus groups that consist of more than one campus.
Allow user to edit Statement/Invoice/Subsidiary comment field.	Select this option to allow the staff member to edit the comment fields on statements, invoices, or subsidiaries in the Print Student Statements wizard and the Third Party - Agency Invoices wizard.

Field	Description
Allow User to Edit Manual Type Refund Calculations	Select this option to allow the staff member to edit manual type refund calculations. If a staff member does not have permissions to edit the manual refund policy, the Refund Calc Details form for a manual refund policy appears in display mode with the Edit Time, Edit Charges, and Edit Payment buttons disabled. If the staff member has edit permissions for non manual refund policies, these permissions remain unchanged. If a staff member has permissions to edit the manual refund policy, the Refund Calc Details form displays all editable columns with a white background. The editable fields for a Manual Refund Policy are Time in Period, Time Complete, Refund Percent, Period Base, Earned Charges, Title IV Refund, and Add'l Inst Refund. The Print button on the Refund Calc Details form is enabled whenever a staff member edits a policy. **Note**: A manual refund policy can be edited only if the Manual Calculation check box is selected. If the Manual Calculation check box is not selected, a staff member who has edit permissions still cannot edit the policy. The Refund Calc Details form appears in edit mode with the Edit Time, Edit Charges, and Edit Payment buttons enabled, but on selecting Edit Time, the Refund Percent field will not be editable; on selecting Edit Charges, the Period Base and Earned Charges fields will not be editable, and on selecting Edit Payments, the Title IV Refund fields will not be editable. To enable these fields, the Manual Calculation check box must be selected.

User Info Academic Records Subtab

The Academic Records subtab on the User Info tab of the Staff Information form and Setup Template form contains configuration settings that give staff members and/or staff groups permissions to perform functions within the Academic Records module.



Field Descriptions

Field	Description
Allow Max. Students in Class and Add/Drop Date Override - All Campuses	Select this option to allow the staff member to override the maximum class size when registering students in a class section for all campuses. During registration, a message is displayed when maximum class size is about to be exceeded. The staff member can indicate at that time that it is OK to enroll the student anyway. **Note**: If this check box is selected, the campus setting for Add/Drop is overridden.
Allow Max. Students in Class and Add/Drop Date Override - User's Campuses Only	Select this option to allow the staff member to override the maximum class size when registering students in a class section for the campuses that the staff member is allowed to access. During registration, a message is displayed when maximum class size is about to be exceeded. The staff member can indicate at that time that it is OK to enroll the student anyway. **Note**: If this check box is selected, the campus setting for Add/Drop is overridden within the campuses that the staff member is allowed to access.
Note: Only one or none of the options above may be selected. Both options may not be selected at the same time.	
Allow Prerequisite/Corequisite registration and Maximum Course Attempts Override	Select this option to allow the staff member to override prerequisite and corequisite course requirements when processing a single student registration in a course for which there are other courses required as prerequisites or corequisites. Also allow the staff member to override the Maximum Course Attempts rule when registering a student. If a staff member without this authorization attempts to register a student without the required prerequisite or corequisite courses, the registration is denied.

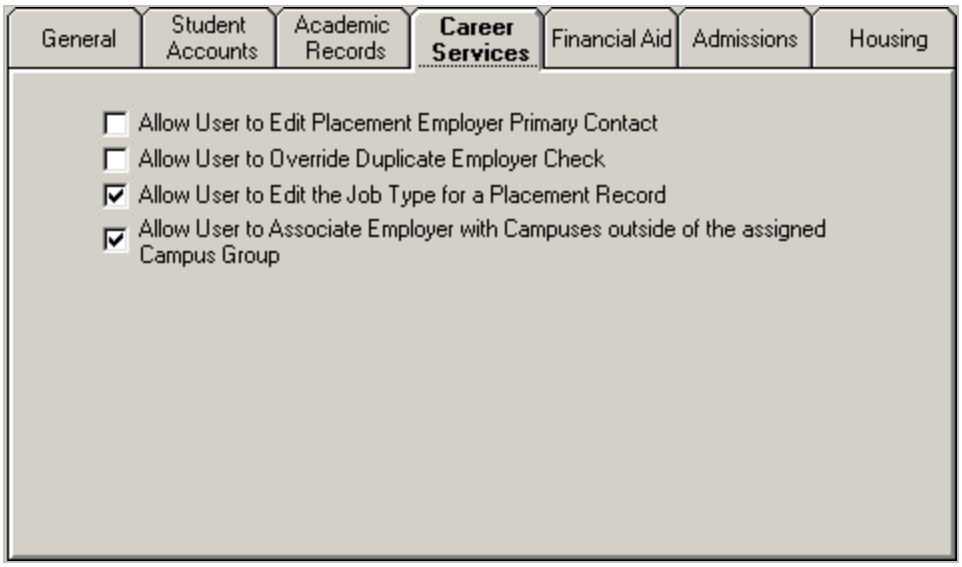
Field	Description
Allow Prerequisite and Corequisite override for drop/unregister	Select this option to allow the staff member to override prerequisite and corequisite course requirements when processing a single student drop or unregister from a course which is a prerequisite or corequisite to another course. If a staff member without this authorization attempts to drop or unregister a student from a course that is a prerequisite or corequisite for another course the student is registered in, the drop or unregistration is denied.
Allow Waitlist max. seats to exceed the class max. seats	Select this option to allow the staff member to specify a maximum number of waitlist seats that exceeds to maximum class seats.
Allow User to Override Status Change Date Validation	Select this option to allow the staff member to override the 'Number of Days Allowed for Status Changes' as specified in the campus setup.
Allow User to Override Transfer Configuration Options	Select this option to allow the staff member to override transfer configuration options.
Allow Access to Transfer Enrollment Option	Select this option to allow the staff member access to the transfer enrollment option, i.e., allow staff member to transfer a student to another enrollment with the same campus.
Allow Access to Transfer Campus Option	Select this option to allow the staff member access to the transfer campus option, i.e., allow staff member to transfer a student to another campus (which changes the Campus field on the Student Master to the new campus).
Allow Access to Transfer Enrollment and Campus Option	Select this option to allow the staff member access to transfer enrollment and campus options, i.e., allow staff member to transfer a student to another enrollment in another campus (which adds the new enrollment to the student's enrollment folder and changes the Campus field on the Student Master to the new campus).
Allow Access Program Transfer and Reentry Option	Select this option to allow the staff member access to program transfer and reentry options.
Allow User to Override Closed Term	Select this option to allow the staff member to reopen a term when it is closed.
Allow User to Override Registration Group Constraint	Select this option to allow the staff member to register a student and assign the student to a group even though the student does not meet the criteria for the group.
Allow User to Override Audit Designation Deadline	Select this option to allow the staff member to override the Audit Designation Deadline date while converting a course from Full Credit to Audit. The staff member can override access to convert a course from Full Credit to Audit after the Audit Designation Deadline date has passed.
Allow User to Override Instructor Course Association.	Select this option to allow the staff member to override the instructor course association.
Allow User to Override SAP Status	Select this option to allow the staff member to override a student's SAP status during the SAP calculation process within the SAP wizard. In addition, the staff member may override a SAP status that had been set to not be recalculated.

Field	Description
Allow User to Override SAP Term Defined Dates	Select this option to allow the staff member to calculate a student's SAP status beyond the period defined by the 'Number of Days after term end date to continue calculating SAP' setting. A campus can define the number of days after a term ends during which SAP calculations may take place. Normally, a staff member is not allowed to perform a manual SAP calculation after that period. If this check box is selected, the staff member can perform a SAP calculation beyond the regular cut off date.
Allow User to Override SAP Payment Period Defined Dates	Select this option to allow the staff member to calculate a student's SAP status beyond the period defined by the 'Number of Days after payment period end date to continue calculating SAP' setting. A campus can define the number of days after a payment period ends during which SAP calculations may take place. Normally, a staff member is not allowed to perform a manual SAP calculation after that period. If this check box is selected, the staff member can perform a SAP calculation beyond the regular cut off date.
Allow User to Override Partial SAP Terms	Select this option to allow the staff member to manually exclude student's SAP terms from the term sequence calculation during SAP evaluation. The staff member can then skip counting Partial SAP Terms as a full term sequence.
Allow User to Override Academic Transcript Hold Group	Select this option to allow the staff member to override the Academic Transcript Hold Group.
Allow User to Rebuild Term Summary Relationships	Select this option to allow the staff member to rebuild Term Summary Relationships by click the Rebuild Relationships button on the Enrollment form. We recommend that you review Term Relationships, Modify Term Relationships, and SAP before selecting this option.
Allow User to Reassign Courses.	Select this option to allow the staff member to reassign courses. See Associate and Transfer courses.
Allow User to Override Locked Term Sequence	Select this option to allow the staff member to override a locked term sequence.
Allow User to Waive/Undo Waive on the Degree Progress Audit	Select this option to allow the staff member to waive/undo waive on the Degree Progress Audit.
Allow User to Override Registration Holds	Select this option to allow the staff member to override a registration hold and register students without needing to remove these students from a registration hold group.
Allow User to Override Registration Locks	Select this option to allow the staff member to override any configured registration locks.
Allow User to Modify Course Section Fee Schedule during Registration	Select this option to allow the staff member to modify the course section fee schedule during registration.

Field	Description
Allow User to Waive Retake Fee	Select this option to allow the staff member to waive retake fees. **Note**: When a staff member is authorized to waive a retake fee and attempts to register a retake course, a message is displayed asking whether to charge a retake fee. The response to this message determines whether a retake fee should be charged.
Allow User to Override Last Day to Withdraw Restriction	Select this option to allow the staff member to drop a course even after the Last Day to Withdraw date has passed.
Allow Access to Connected Enrollment Option	Select this option to allow the staff member access to the Connected Enrollments option under View > Academic Records > Enrollment. For more information, see Enrollment in Academic Records.
Allow User to Override SPE Course Progression	This setting enables the Master Override flag accessed from View > Academic Records > Schedule > View Course Progression (button) when "Allow courses exempt from progression" is enabled. For more information, see View Course Progression.
Allow User to Override Expiration Deadline Date.	Select this option to allow the staff member to override the expiration deadline date by the number of days configured on the campus level.
Allow User to Override Transfer Credit Approval Restriction	Select this option to allow the staff member to override permission for approving transfer credit.
Allow User to Fulfill/Undo Fulfill Requirements on the Degree Progress Audit.	Select this option to allow the staff member to fulfill/undo fulfill requirements on the DPA.

User Info Career Services Subtab

The Career Services subtab on the User Info tab of the Staff Information form and Setup Template form contains configuration settings that give staff members and/or staff groups permissions to perform functions within the Career Services module.

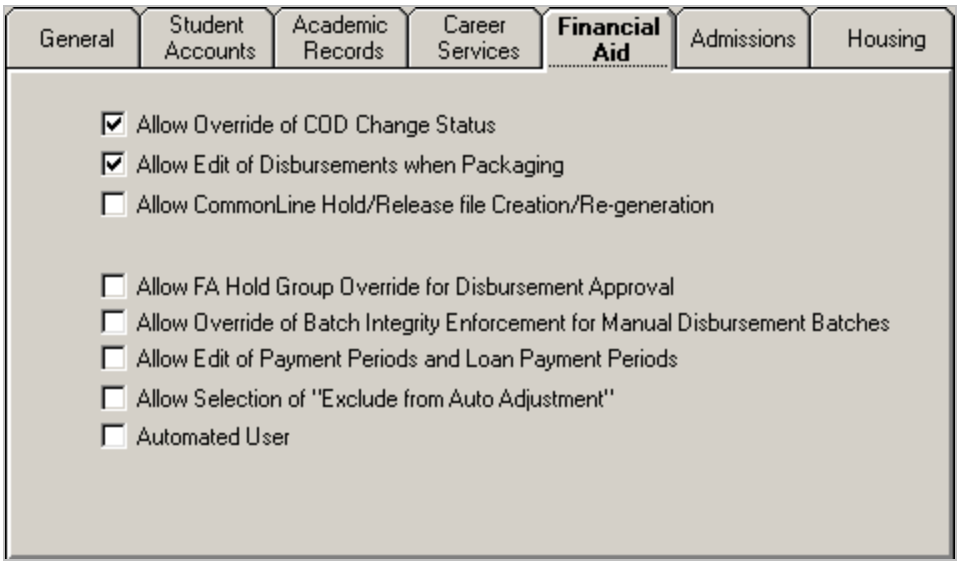


Field Descriptions

Field	Description
Allow User to Edit Placement Employer Primary Contact.	Select this option to allow the staff member to edit the primary contact for placement employers. If this option is cleared (default setting), the staff member/group cannot change the primary contact.
Allow User to Override Duplicate Employer Check	Select this option to allow the staff member to override the check for duplicate employers. If this option is cleared, the staff member/group cannot override the duplicate employer check.
Allow User to Edit the Job Type for a Placement Record	Select this option to allow the staff member to edit the "Job Type" field in the student's placement record. If this option is cleared, the staff member cannot edit the student's "Job Type" field in the placement record.
Allow User to Associate Employer with Campuses outside of the assigned Campus Group.	Select this option to allow the staff member to associate an employer with campuses outside of their assigned campus group. If the setting is enabled and the staff member is assigned as a Career Services Advisor, the staff member can edit existing employers and associate them with campuses outside their assigned campus group. See also Employers.

User Info Financial Aid Subtab

The Financial Aid subtab on the User Info tab of the Staff Information form and Setup Template form contains configuration settings that give staff members and/or staff groups permissions to perform functions within the Financial Aid module.

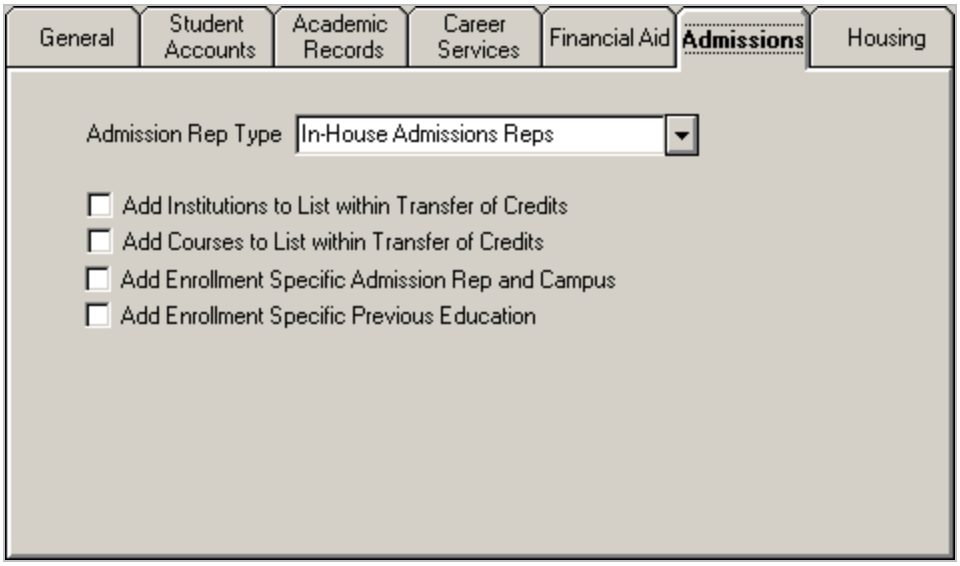


Field Descriptions

Field	Description
Allow Override of COD Change Status	Select this option to allow the staff member to override the Common Origination and Disbursement (COD) change status.
Allow Edit of Disbursements when Packaging	Select this option to allow the staff member to edit disbursements when packaging financial aid.
Allow FA Hold Group Override for Disbursement Approval	Select this option to allow this staff member to allow a FA Hold Group Override for disbursement approval. This allows an override to be applied for future terms, and allows an override for a disbursement from an existing term. By default, this option remains cleared.
Allow Override of Batch Integrity Enforcement for Manual Disbursement Batches	Select this option to allow this staff member to override the batch integrity tracking for an individual manually created batch. By default, this option remains cleared.
Allow Edit of Payment Periods and Loan Payment Periods	Select this option to configure staff members with security access to the payment period button on the Academic Year form. Administrators thus control which staff members can add or edit payment periods from the payment period form.
Allow Selection of "Exclude from Auto Adjustment"	Select this option to allow the staff member to exclude specific academic years and payment periods from being adjusted as the result of Student Pace Evaluation. See also Locking/Unlocking Start and End Dates.
Automated User	Select this option to specify that the staff member is an Automated User.

User Info Admissions Subtab

The Admissions subtab on the User Info tab of the Staff Information form and Setup Template form contains configuration settings that give staff members and/or staff groups permissions to perform functions within the Admissions module such as adding institutions or courses to lists within transfer of credits.



Field Descriptions

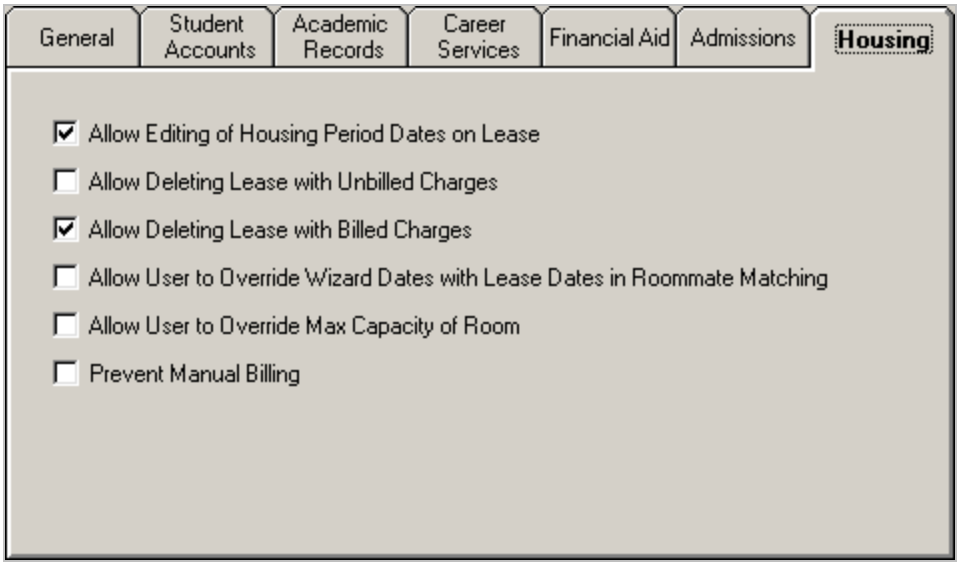
Field	Description
Add Institutions to List within Transfer of Credits See Notes 1 and 2.	When *only* the 'Add Institutions to List Within Transfer of Credits' is selected, the Transfer Credits form displays the Add Institution button, but *not* the Add Courses button. The staff member can add institutions to the existing list, but has to select courses from the existing list of courses using the Search icon.
Add Courses to List within Transfer of Credits See Notes 1 and 2.	When *only* the 'Add Courses to List within Transfer of Credits' is selected, the Transfer Credits form displays the Add Courses button, but *not* the Add Institution button. The staff member can only select available institutions using the Search icon. After selecting an institution, the Add Courses button is enabled and courses can be added by clicking the Add Courses button.

Field	Description
Notes: 1. When *both* 'Add Institutions to List within Transfer of Credits' and 'Add Courses to List within Transfer of Credits' are selected, the Add Institution and Add Courses buttons on the Transfer Credits form are enabled. The selected staff member will have permission to add institutions and courses to the list of acceptable institutions and courses that may be transferred. First click the Add Institution button to add a new institution. Once the institution is added, the Add Courses button is enabled. Click the Add Courses button to select the course. 2. When *neither* 'Add Institutions to List within Transfer of Credits' *nor* 'Add Courses to List within Transfer of Credits' is selected (both check boxes cleared), the Transfer Credits form displays only the Search icons, but not the Add Institutions or Add Courses buttons. Staff members can neither add new institutions nor courses to the existing lists. Instead, staff members can only select from the existing list of institutions and courses using the Search icons.	
Add Enrollment Specific Admissions Rep and Campus	Select this option to allow the staff member to assign an enrollment specific Admissions Rep and Campus while enrolling a student into a program. **Note**: The Admissions Rep and Campus are tied together in a single permission property to prevent the staff member from changing the Campus when the currently selected Admission Rep is not a member of the new Campus selection (which would result in a blank Admission Rep because the Admission Rep is driven off of the Campus selection). This scenario would prevent the staff member from proceeding further in the enrollment process.
Add Enrollment Specific Previous Education	Select this option to allow the staff member to assign enrollment specific Previous Education during the enrollment process.

User Info Housing Subtab

The Housing subtab on the User Info tab of the Staff Information form and Setup Template form contains configuration settings that give staff members and/or staff groups permissions to perform functions within the Housing module.

The Housing sub-tab is only visible when Housing is enabled in CampusNexus Student.



Field Descriptions

Field	Description
Allow Editing of Housing Periods on Lease	Select this option to allow the staff member to edit the Housing Period on housing lease.
Allow Deleting Lease with Unbilled Charges	Select this option to allow the staff member to delete a lease with unbilled charges through View > Housing > Application/Lease > Lease (button) Delete (button). The default for this option is cleared.
Allow Deleting Lease with Billed Charges	Select this option to allow the staff member to delete a lease with billed charges through View > Housing > Application/Lease > Lease (button) Delete (button). The default for this option is cleared.
Allow User to Override Wizard Dates with Lease Dates in Roommate Matching	Select this option to allow the staff member to place a student in a room based on individual lease dates via the Roommate Matching Wizard (Daily > Housing > Roommate Matching). The default for this option is cleared.
Allow User to Override Max Capacity of Room	Select this option to allow the staff member to place a student in a room regardless of maximum occupancy via the Roommate Matching Wizard (Daily > Housing > Roommate Matching). Staff member will also be authorized to update lease if room is overbooked. The default for this option is cleared.
Prevent Manual Billing	Select this option to prevent the staff member from saving changes or billing selected charges on the Charge Schedule (View > Housing > Application/Lease > Lease > View/Edit Charge Schedule (button) > Save (button) > Bill Selected Charges (button)) and (View > Housing > Application/Lease > Lease > Bill Outstanding Charges (button)). The default for this option is cleared.

Managing Staff Groups

Staff members are organized into groups for administrative purposes. Typically, the groups are based on departments and job functions. You can add or edit and delete staff groups; however, system staff groups may not be deleted from CampusNexus Student.

System Staff Groups

Staff Group Name	Group Code
1098-T Utility Batch Options	1098TUDB
1098-T Utility Cleanup Wizard	1098TUCL
1098-T Utility Lock 1098-T Batch	1098TULK
1098-T Utility Process 1098-T's	1098TUPR
Academic Advisor	ACAD
System Administrators	ADMIN
Director of Admissions	DA
DSO/RO Group	DSORO
Financial Aid Advisor	FAADV
High School Advisor	HSADV
LMS Process	LMSPROC
Placement Officer	PL
Career Services Advisor	PLADV
Admissions Rep	REP
AD-SAP Linked Enrollment	SAPLNKEN
Instructors	TEACH
Portal Console Admin	WPADMIN
Portal Configuration	WPCONFIG

Note: If your school admits nonimmigrant (international) students, create an International Advisor Group, and assign it the NI Advisor Code.

Advisors

Students have many advisors while enrolled at a school. You can store the student's various departmental advisors in CampusNexus Student. When advisor information changes, you have easy access to the student's list of advisors.

System staff groups are assigned to the various advisor types. The Staff Group detail form includes an Advisor Code list. For each of your advisor groups, select one of the advisor codes. When you assign a staff member to one or more of these staff groups, the staff member appears in the drop-down list for that advisor type. Do not select an advisor code for non-advisor staff groups.

Advisor Type Codes

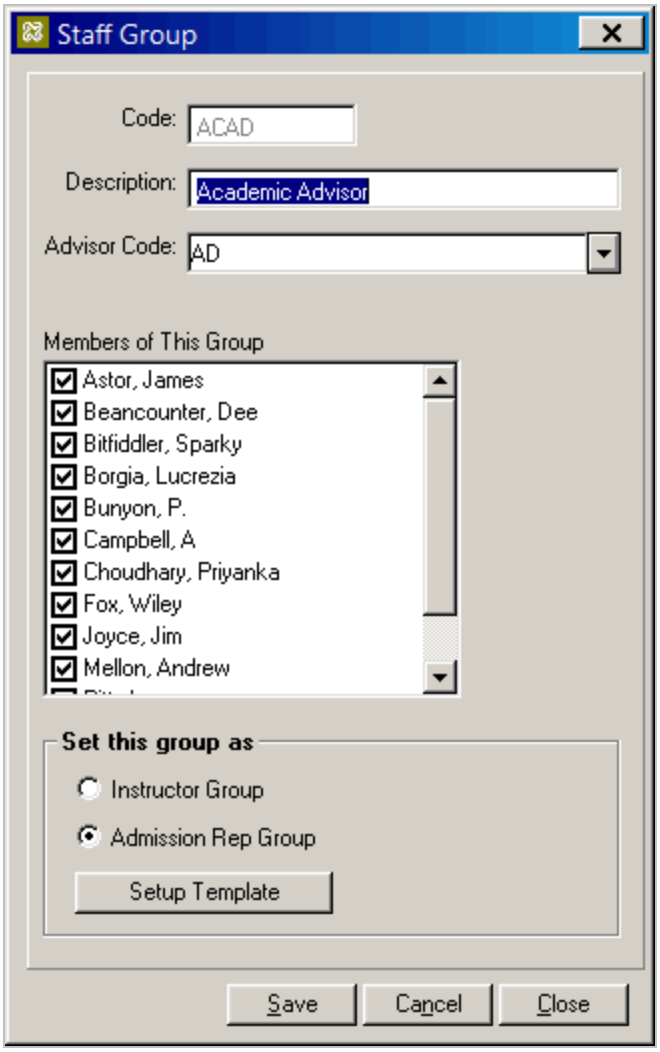
Code	Description
AD	Academic Records
AL	Alumni
AM	Admissions
AP	Automated Processes
BS	Book Store
CM	Contact Manager
FA	Financial Aid
HS	Housing
LM	Loan Management
NI	International
ORGLSN	Organization Liaison
OTH	Other
PL	Career Services
SA	Student Accounts
SS	Student Services
SY	System

See the topic on Security to add security parameters to your new group.

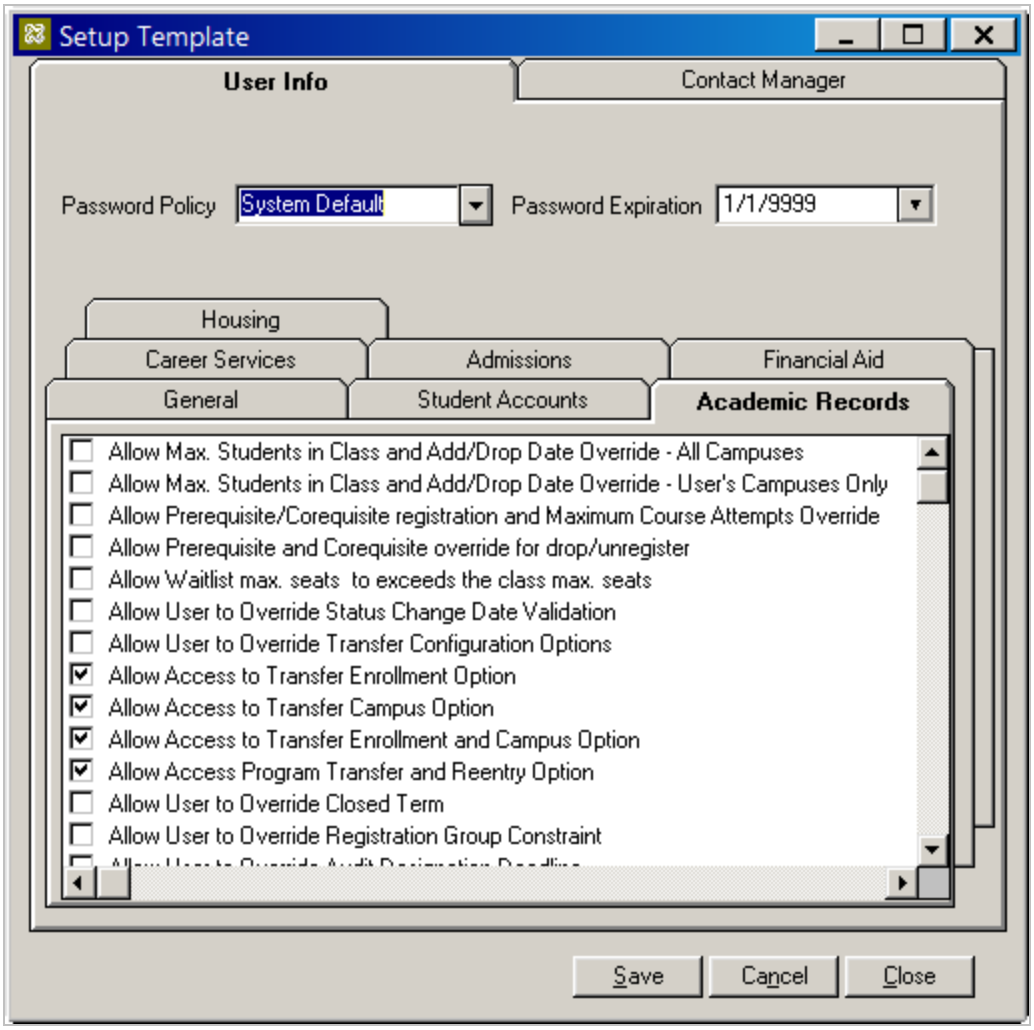
To add or edit a staff group:

1. Navigate to **Setup > Staff**. The Staff Maintenance form is displayed.
2. Select the **Staff Groups** tab. A list of all Staff Groups that have been configured is displayed.
3. Click **Add**, or select a record and click **Edit**. The Staff Group form is displayed.

   Note: A system staff group can be identified by its dimmed, non-editable Code on the Staff Group form.



4. Specify a unique **Code**.
5. Enter a **Description**.
6. Select an **Advisor Code** if necessary. Refer to Advisors.
7. Select the **Members of This Group**. To add all staff members to the group, click **All**. To clear all staff members from the group, click **None**. When adding a new staff group, the check boxes next to the staff members are cleared by default.
8. Select **Admissions Rep Group** or **Instructor Group** option.
9. Click **Setup Template**. The Setup Template form is displayed.



10. In the Setup Template form, select the values to be associated with a new staff member created from the Daily menu. The User Info tab of the Setup Template form is displayed with subtabs for configuration and override permissions settings. The Contact Manager tab allows you to define the Contact Manager Security Policies.
11. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.
12. When you establish a new staff group, during initial system setup or later during ongoing operations, you must open a **Student Master**, navigate to **Setup > Field Level Security**, and select the new group.

    The field level security settings for each field are initially displayed as *Update*. To trigger a security record for each field for each staff group, you must select a field, choose an option from the drop-down list (*Update, Display, None*), even if it is the same (*Update*) option. When the form is closed, the necessary field-level security records for the group are written to the database. This procedure must be followed for every staff group to establish the baseline field level security records.

Deleting a Staff Group

When you delete a staff group, you are not deleting staff members. If you delete the only group to which a staff member belongs, that staff member can no longer log in to CampusNexus Student. Staff groups that are required by the system may not be deleted; however, there is no requirement that you must assign a person to these groups.

To delete a staff group:

1. Navigate to **Setup** > **Staff**. The Staff Maintenance form is displayed.
2. Select the **Staff Groups** tab.
3. Select the staff group to be deleted and click **Delete**..
4. A confirmation message is displayed. Click **Yes**. The group is removed from the list of staff groups.

Setup Template Form

Use this form to define the values to be associated with a new staff member created from the Daily menu. To enable the daily staff maintenance features by accessing the Admissions Rep Maintenance form or Instructor Maintenance form, a template must be created to define default setup configurations for information that may be sensitive.

The User Info tab displays subtabs of override permissions settings. The Contact Manager tab provides Contact Manager security settings. Once a template is created, the group is available to add new members through the Daily path. Only one Setup template can be defined per staff group.

Upon adding or editing a Staff Group, the user may define the Staff Group as an Admissions Rep Group or an Instructor Group.

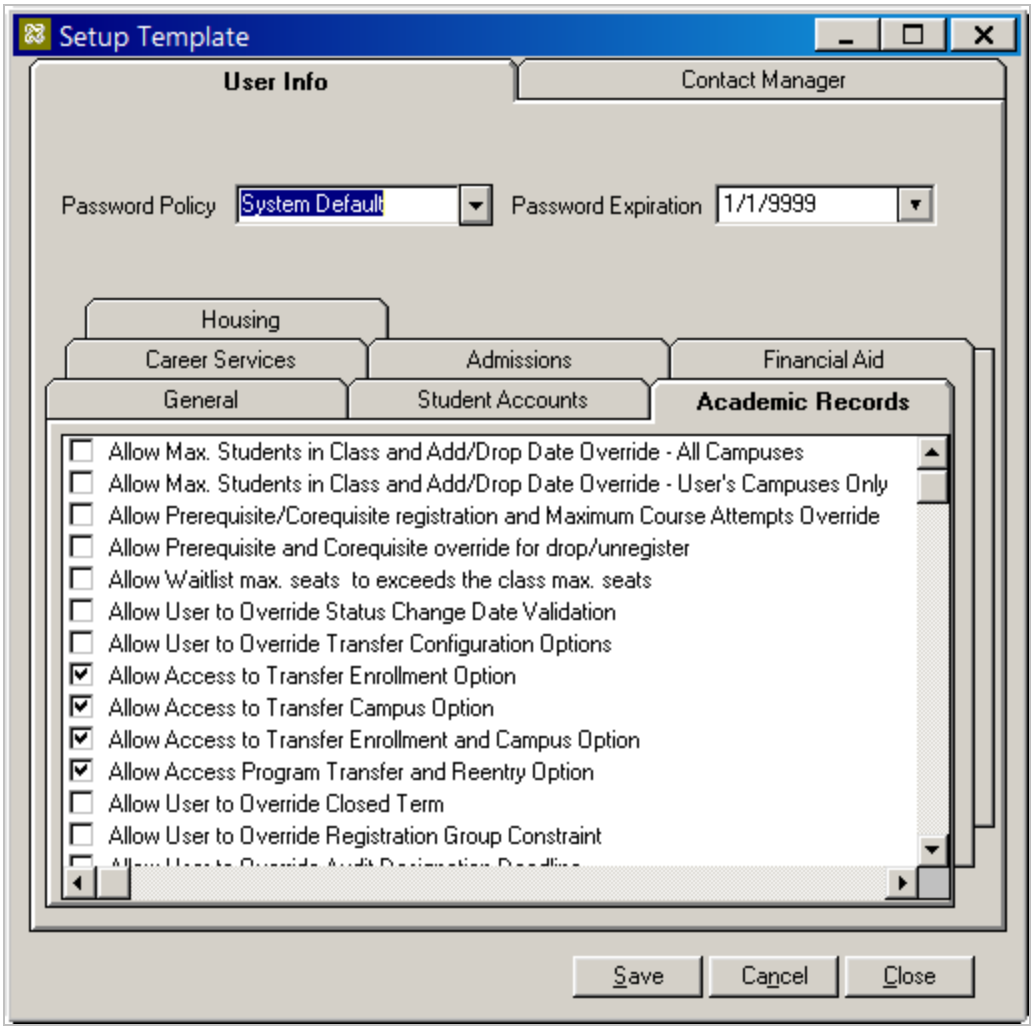
Notes:

- Prior to initial use of the path Daily > Admissions > Admissions Rep Maintenance, you must first define a Setup Template for the group ID with the *REP* code.
- Prior to initial use of the path Daily > Academic Records > Instructor Maintenance, you must first define a Setup Template for the group ID with the *TEACH* code.
- All the options on the Setup Template can be accessed through the Staff Information form and set as needed. Admissions Reps and Instructors have access to the Daily menu and do not see any of the options.
- To change the User Info or Contact Manager tab information, the user must access the staff member through the Staff Maintenance form. These fields are unavailable through the Daily menu option.

To set up the staff group permissions template:

1. Navigate to **Setup > Staff**. The Staff Maintenance form is displayed.
2. Select the **Staff Groups** tab. A list of all Staff Groups that have been configured is displayed.
3. Click **Add** to add a new staff group or select a group or click **Edit** to view or edit an existing group. The Staff Group form is displayed.

4. Click **Setup Template**. The Setup Template form is displayed.



5. Select appropriate **Password Policy** and **Password Expiration** options.
6. Select appropriate options on the **User Info** and **Contact Manager** tabs.

   The User Info subtabs (see Reference topics) contain permissions pertaining to General settings, Student Accounts, Academic Records, Career Services, Financial Aid, Admissions, and Housing (if Housing is enabled in CampusNexus Student). With the exception of the Financial Aid subtab, the configuration options on the User Info subtabs for Staff Groups are the same as for Staff Members.

Field Descriptions: Financial Aid Subtab

Field	Description
Allow Override of COD Change Status	Select this option to allow the staff group to override the Common Origination and Disbursement (COD) change status.
Allow Edit of Global Exception Details	Select this option to allow the staff group to edit Global Exception details.

Field	Description
Allow FA Hold Group Override for Disbursement Approval	Select this option to allow this staff group to override specific hold groups. This will allow designated staff to override financial aid holds for specific groups, and also enable the Approve Disbursements for Pay logic to use student groups as an additional criterion when evaluating financial aid disbursement approvals.
Allow Override of Batch Integrity Enforcement for Manual Disbursement Batches	Select this option to allow this staff group to override manual disbursement batches.
Allow Edit of Payment Periods and Loan Payment Periods	Select this option to allow this staff group to edit payment periods and loan payment periods.
Allow Selection of "Exclude from Auto Adjustment"	Select this option to allow this staff group to exclude academic year, payment period, loan period, and loan payment period from auto adjustment.

The Contact Manager tab contains configuration settings for Contact Manager functions. The options are the same as for staff member configurations (see Assigning Contact Manager Options), but apply to staff groups.

7. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Password Profiles

Password profiles provide basic password functionality such as password expiration, password reset, and password rules. Much of the system security for CampusNexus Student is based on the parameters set up in this profile. A staff member is assigned a User ID and a Password. Other information about the staff member (user) is also recorded. Certain default options are assigned for each user. Each staff member must be assigned to at least one campus group.

All existing staff and any new staff added are assigned the system default password profile. The system default password profile is editable (the associated record is stored in a database table with a System Code of 1, but it cannot be deleted from the system. The system default profile has the following restrictions:

- Does not allow staff to change their passwords
- Requires at least one character in the user's password
- Does not require numeric characters in the password
- Does not enforce password expiration
- Does not allow the user name and password to be the same

As system administrator, you can deny or grant users permissions to change their own passwords. Users associated with password profiles where Allow User Change is set to N are not allowed to change their passwords, and therefore, the Change Password button on session parameters is disabled.

Whenever the administrator changes a user's password, an option forces the user to change the password the next time the user signs into CampusNexus Student. If the administrator selects the option to force the user to change the password, the password expiration date is set to the current system date. If the administrator does not force immediate user password change, the expiration date is not modified, and the following message is displayed: "*Require user to change password on next login?*"

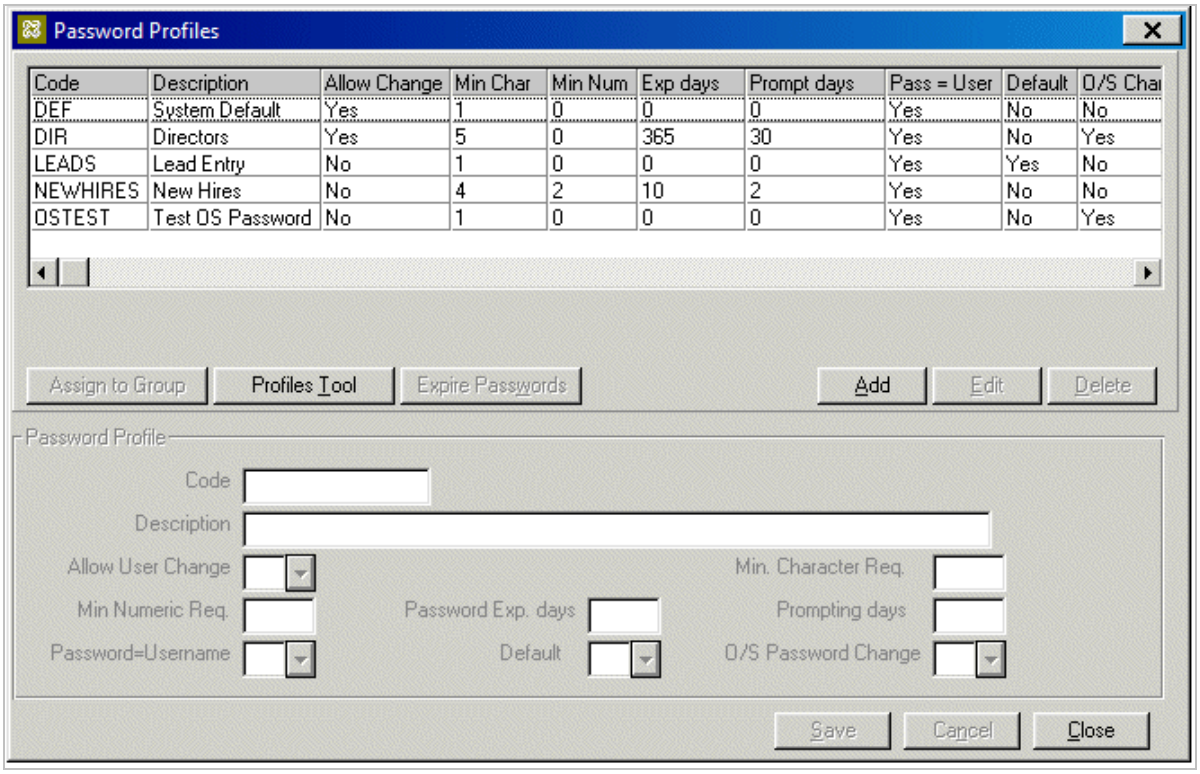
Administrators can lock and unlock staff access to CampusNexus Student at anytime. By default all staff access is not locked. Staff members with locked access receive the following message when signing into CampusNexus Student: "*Your account is locked, please contact your administrator.*" When unlocked staff members sign into CampusNexus Student, they forced to change their passwords.

Changes to password profiles (for example, changing the minimum password length) take effect the next time when users assigned to the affected group change their passwords.

Note: A password profile is not used for the Administrator login. This ensures that the Administrator is not accidentally locked out of CampusNexus Student.

To manage password profiles for staff members and groups:

1. Navigate to **Setup > Staff**. The Staff Maintenance Form is displayed.
2. On the Staff Maintenance form, click the **Password Profiles** tab. The Password Profiles form is displayed.



3. Click **Add** to create a password profile, or select a staff member from the list and click **Edit** to modify a password profile.
4. Click **Delete** to remove a password profile that is not in use.
5. Click **Expire Passwords** to force passwords to expire the next day.
6. Click **Assign to Group** to assign a profile to a staff groups .

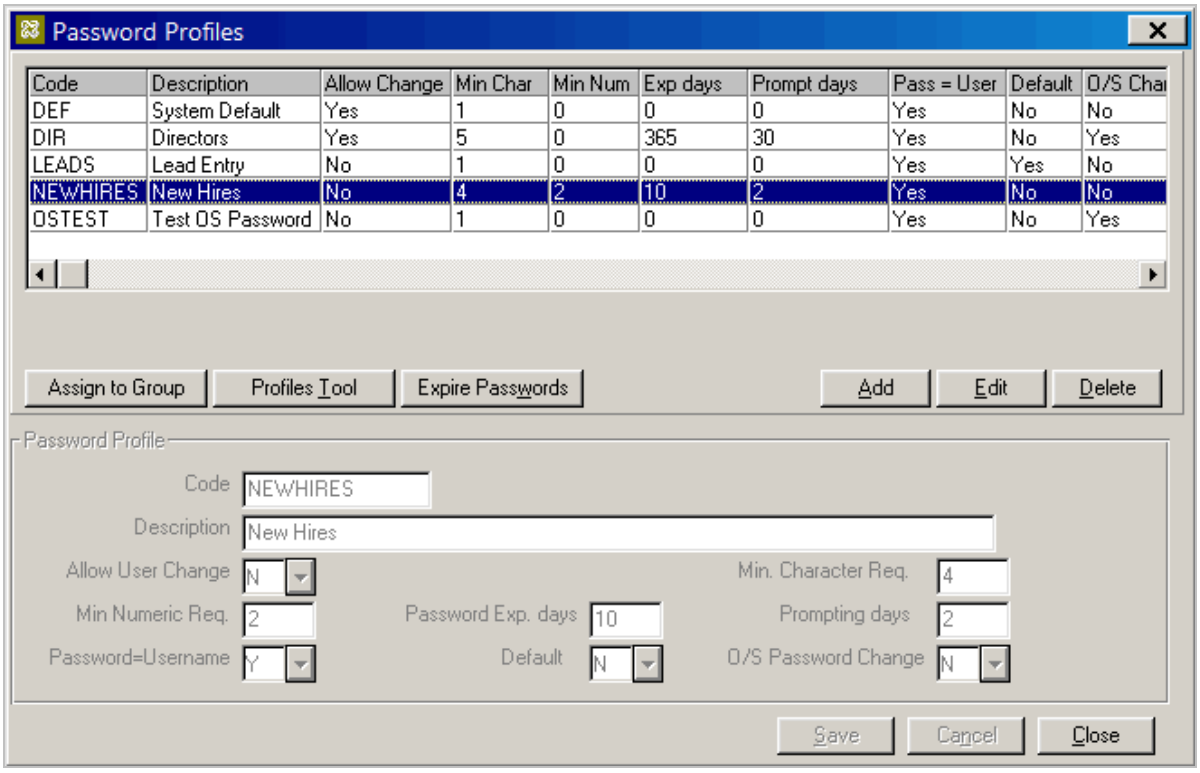
Note: When you edit or delete a password profile, all changes are audited. Audit verifications are handled at the database level only and performed through appropriate SQL queries.

Adding Password Profiles

The Password Profiles form under Setup > Staff enables the system administrator to create and customize password profiles to apply different sets of password rules to different users.

To add a password profile:

1. Navigate to **Setup > Staff > Password Profile**. When the Password Profiles form is displayed, only the System Default profile is displayed until you create new profiles.



2. Click **Add** to enable the fields in the lower section of the form.

3. Enter the information in the fields as follows:

Field Descriptions

Field	Description
Code	Enter an 8-character code for the password profile. This value appears in the Code column on the Password Profiles form.
Allow User Change	Select Y to permit users associated with the profile to modify their own password or select N prevent users from modifying their passwords.
Description	Enter a name or description (up to 40 characters) to uniquely identify the profile. This value appears on the Assigned Staff panel in the Profiles Tool.
Min. Character Req.	Enter integer values from 1 to 60 to specify the minimum number of characters required for a valid password.
Min Numeric Req.	Enter integer values from 1 to 60 to specify the minimum number of numeric characters required to be included for a valid password.
Password Exp. days	Enter integer values from 0 to 365 to specify the number of days a user's password is valid before the password expires. Setting this field to zero (0) allows the passwords of all users associated with this password profile to never expire. In this case the Password Expiration Date for such staff is "01/01/9999." This field is updated whenever a user changes a password. The Password Expiration Date is set to the system date when any user (staff) is created by an administrator and associated with a password profile where Allow User Change is set to Y. This forces new users to change their passwords upon first signing into CampusNexus Student. Users who get an expiration notification have the option of selecting Change Password to invoke the change password form or canceling the notice. When the Password Expiration Date is the same as the System Date, the user is forced to change the password when signing in to CampusNexus Student.
Prompting days	Enter integer values from 0 to 365 to specify the number of days to prior to password expiration to begin displaying reminder messages to the user that the password will expire unless it is changed.
Password=User name	Select **Y** to allow the password to be the same as the user name. otherwise select **N**.
Default	Select **Y** to allow the password profile to be assigned as the system-wide default for any users not assigned to a staff group with a default password profile. Only one password profile may have this setting. The **N** option assigns the system profile as the default.
O/S Password Change	Select **Y** to allow changing a user's operating system password to match the CampusNexus Student password when the CampusNexus Student password is changed. If set to**N**, only the CampusNexus Student password will be changed.

4. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Viewing and Searching Password Profiles

The system administrator can view staff and associated password profiles and search for a staff member in the profiles tool

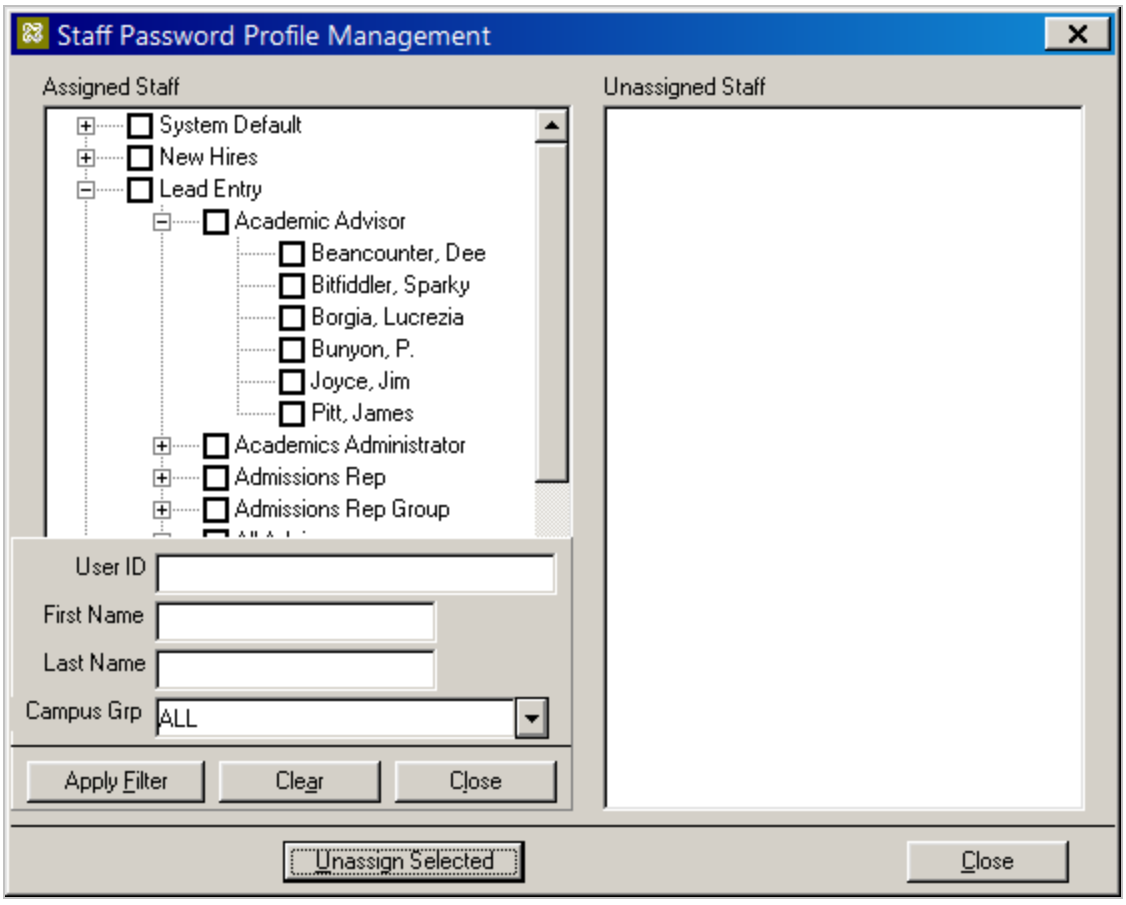
To view staff and associated password profiles:

1. Navigate to **Setup > Staff > Password Profiles** (tab).
2. Click the **Profiles Tool** button. The Staff Password Profile Management form is displayed.
3. Choose the staff group or password profile to view by using the scroll bar to navigate to the profile listed by its name (derived from the Description field on the Password Profiles form) in the Assigned Staff panel.
4. Click the plus sign **+** to expand a staff group to view profiles for its members. All group members share the same password profile.

   Any staff members who do not have a password profile assigned appear in the panel in the Unassigned Staff panel.

To search for a staff member in the profiles tool:

1. In the Staff Password Profile Management form, click the **Assigned Staff Filter** button. The search tool is displayed at the bottom of the Assigned Staff panel.



2. Enter your search criteria in the fields that apply.
3. Click **Apply Filter** to search for staff members who meet the search criteria.

When a search is executed, the Password Profile trees in the left panel is filtered to show only the profile and staff groups associated with the members who satisfy the search criteria.

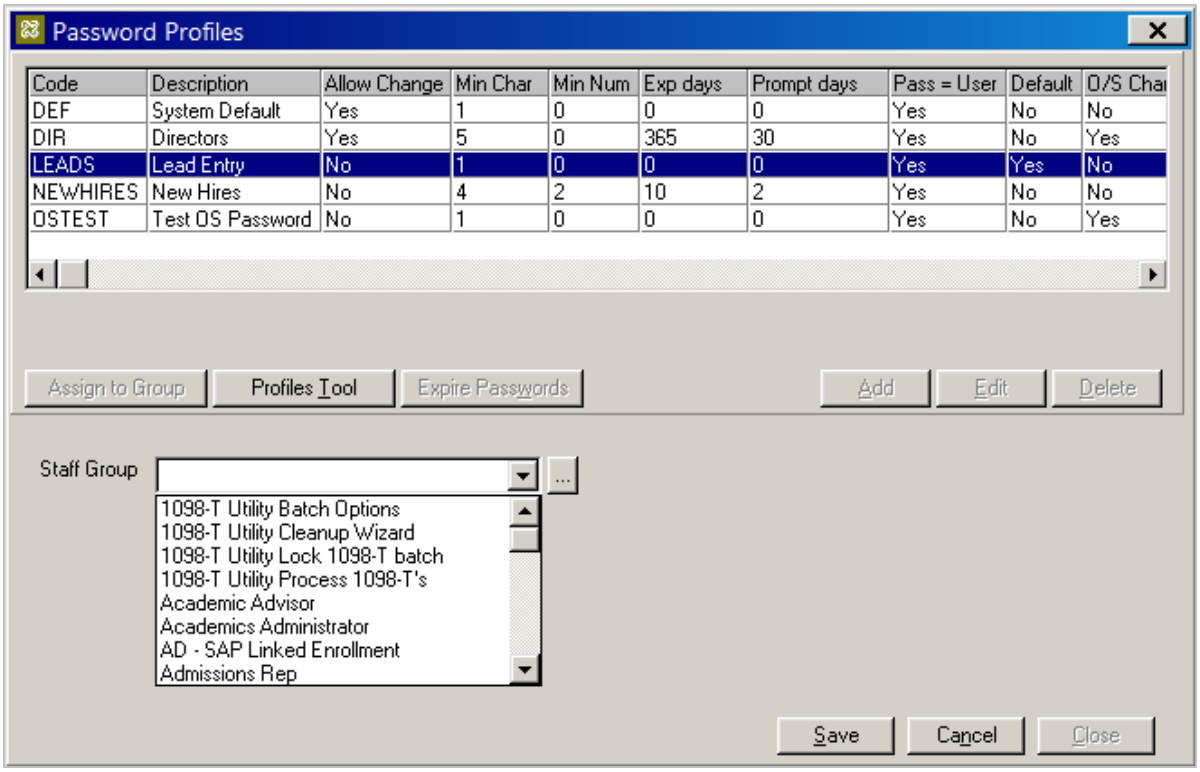
Assigning Password Profiles

The system administrator can assign password profiles to:

- Staff groups
- Unassigned staff groups
- Individual staff members

To assign a password profile to a staff group:

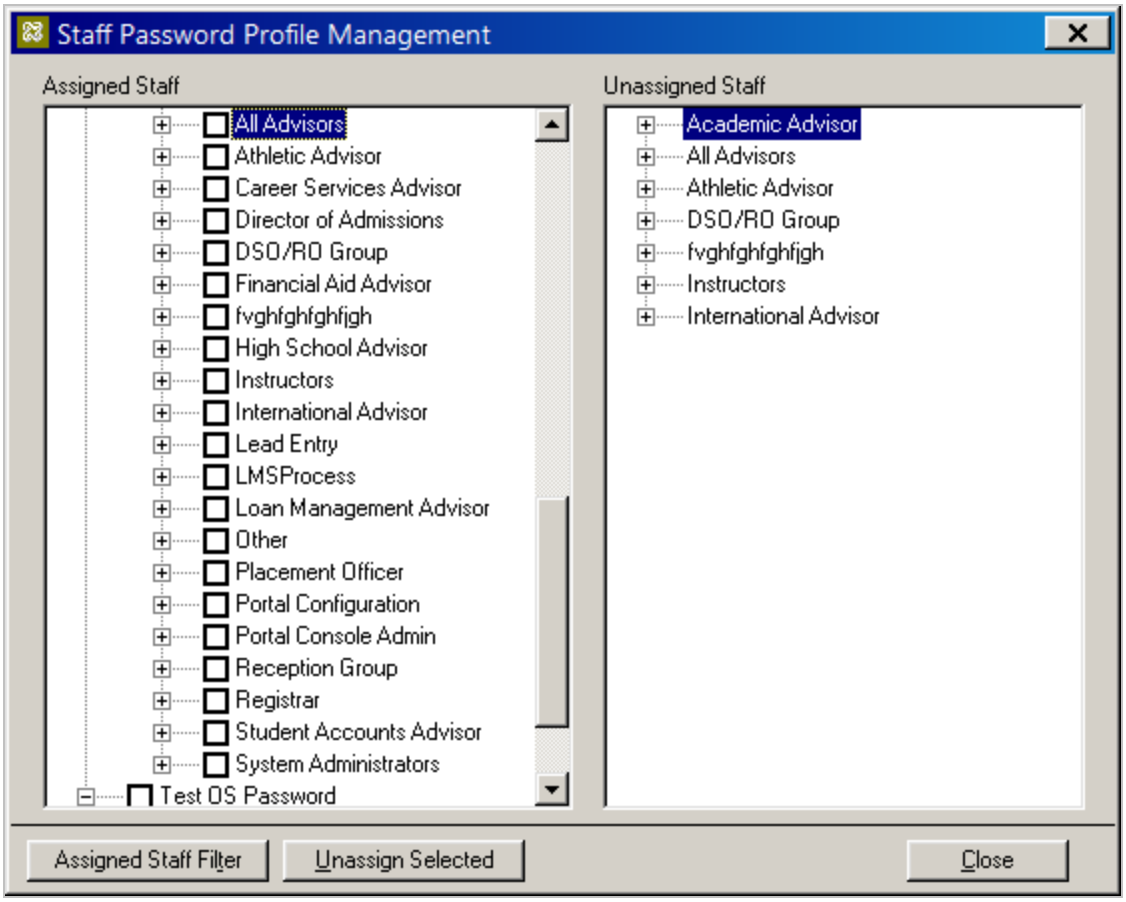
1. Navigate to **Setup > Staff**. The Staff Maintenance form is displayed.
2. On the Staff Maintenance form, click the **Password Profiles** tab. The Password Profiles form is displayed.
3. Select a password profile.
4. Click **Assign to Group** and select the staff group to be assigned this profile from the **Staff Group** list.



5. Click **Save** to assign the password profile to the staff group, or **Cancel** to discontinue the changes.

To assign a password profile to an unassigned staff group:

1. Navigate to **Setup > Staff**. The Staff Maintenance form is displayed.
2. On the Staff Maintenance form, click the **Password Profiles** tab. The Password Profiles form is displayed.
3. On the Password Profiles form, click **Profiles Tool**. The Staff Password Profile Management form is displayed.

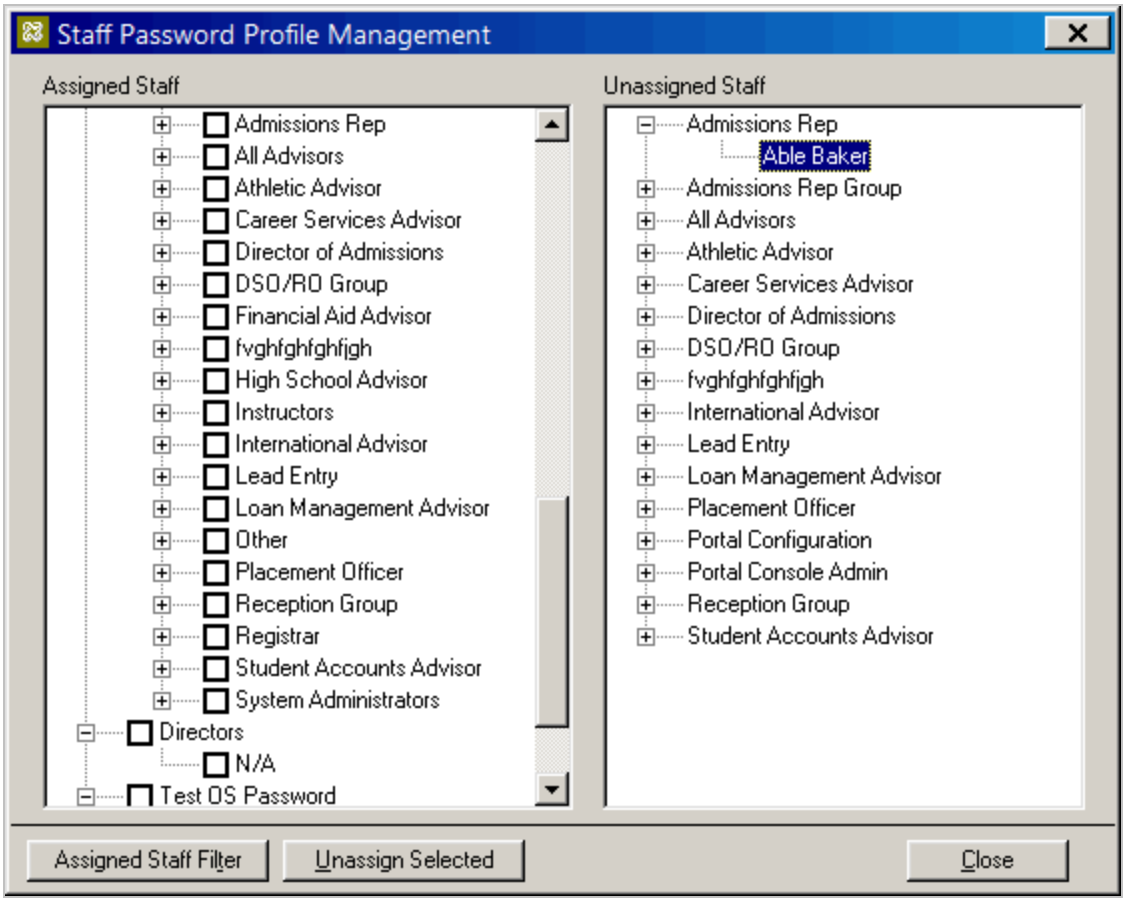


4. Select an unassigned staff group from the **Unassigned Staff** panel, and drag and drop the unassigned staff group over the desired password profile in the **Assigned Staff** panel.

   The form is refreshed with the new information, and the tree is displayed in its collapsed form. To view the changes, click the plus sign **+** to expand the view. All staff within the group is assigned the selected password profile.

To assign a password profile to a staff member:

1. Navigate to **Setup > Staff**. The Staff Maintenance form is displayed.
2. On the Staff Maintenance form, click the **Password Profiles** tab. The Password Profiles form is displayed.
3. On the Password Profiles form, click **Profiles Tool**. The Staff Password Profile Management form is displayed.
4. Select an unassigned staff member from the **Unassigned Staff** panel, and drag and drop the unassigned staff over the desired password profile in the **Assigned Staff** panel.

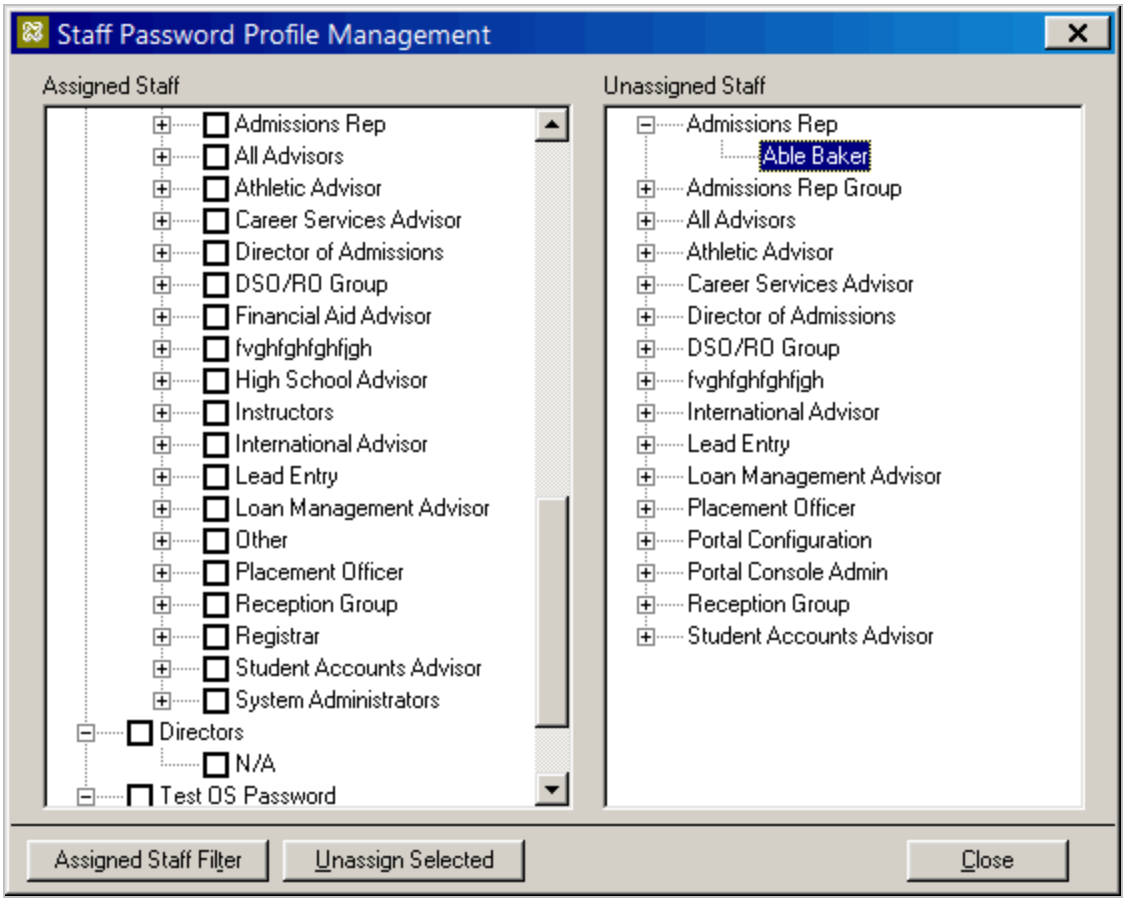


The form is refreshed with the new information, and the tree is displayed in its collapsed form. To view the changes, click the plus sign **+** to expand the view. The staff member is assigned the selected password profile.

Removing a Password Profile

To remove a password profile from a staff member:

1. Navigate to **Setup > Staff**. The Staff Maintenance form is displayed.
2. On the Staff Maintenance form, click the **Password Profiles** tab. The Password Profiles form is displayed.
3. On the Password Profiles form, click **Profiles Tool**. The Staff Password Profile Management form is displayed.



4. In the **Assigned Staff** panel, select the staff member to be unassigned.

   To unassign other members or groups continue selecting staff members and groups by selecting the check boxes next to each name.

5. Click **Unassign Selected**.

   When you confirm the action by clicking **Yes** in the confirmation box, all selected staff members appear in the **Unassigned Staff** panel listed in every group to which that the staff member belongs.

   When you unassign a staff group, all the members of that group, plus all the groups to which all the members belong, are listed on the **Unassigned Staff** panel.

Note: You cannot exit the Profile Management tool without reassigning a profile to all unassigned members.

Modifying Your Password

Passwords can be set by the system administrator to expire after a prescribed number of days, or at the next sign-in. If your password expired, you are prompted to change it. Enter a new password and save the change. CampusNexus Student will launch and the new password will be in effect the next time you sign in.

You can also change your password at any other time. To change your own password, your profile must allow it. This is enabled by the system administrator through Setup > Staff on the User Info tab of the Staff Information form for individual staff members, or it can be managed for staff groups using the Password Profile management tool.

To change your password:

1. Double-click the **Campus ID** field on the status bar below the CampusNexus Student work area.
2. When the Session Parameters dialog is displayed, click **Change Password**.

   If your system administrator has not configured your profile to allow you to change your password, the Change Password button will not be available on the Session Parameters dialog, and you will be unable to sign into CampusNexus Student until the system administrator supplies you with a valid password.
3. When the User Password Change dialog is displayed, enter the new password in the top field, and reenter the new password in the bottom field to confirm the exact characters. The passwords are masked by asterisks for privacy.

   CampusNexus Student passwords are not case sensitive and may be required to contain numeric characters. If you enter a password with upper and lower case characters and the O/S Password Change option is set to Y on your password profile, the O/S password will be case sensitive, but the CampusNexus Student password will remain case insensitive. For example, if you enter AbCd as a password, the O/S password will be AbCd, however, the CampusNexus Student password will be accepted with upper or lowercase as long as the characters are in the correct sequence. All case combinations of those characters are accepted as valid CampusNexus Student passwords: ABcD, ABCD, AbCD, aBCD, aBCd, ABcd, AbCd, AbcD, aBCd, aBcD, abCD, Abcd, aBcd, abCd, abcD, abcd, and AbCd.

   Note: If your password profile has the OS Password Change option set to Yes, and if your OS password does not match the old CampusNexus Student password, the message "*Old password does not match current network password. Please enter your current network password.*" is displayed. Click **OK** to display the Password Change form and enter the old password in the Domain Password field and click **OK** to apply the change. The password change sets the new OS password to match the CampusNexus Student password just entered.

   When signing into the remote server using a local user account (as opposed to a user account on the remote server's domain), and the OS password is not successfully applied when entering the new CampusNexus Student password, a Domain/Remote Server field is displayed to allow you to specify the domain or the remote server where your user account is located when changing the associated OS password. This field defaults to the domain or remote server name depending on how you signed in. If you signed into the server using a local account, the server name will be the default. If you signed into a domain account, the server's domain name is the default. If you signed into the remote server using a local account, enter two backslashes immediately prior to the server name, for example: `\\servername`.

   The first attempt made to change the user's OS password uses the server's domain as the place to locate the user account to change. A user who is signing into the remote server using a local account (where the password profile is set to change the OS password) will always receive an initial error message when changing the password in CampusNexus Student.
4. **Save** the changed password.

Central Security Application

The Central Security Application is accessible to system administrators through a Setup menu option. The application allow system administrators to set up and control security requirements for users for all Anthology Inc. products in one location. CampusNexus Student, and at least one other Anthology Inc. product must reside on the same server, otherwise the Central Security Application is not accessible in CampusNexus Student.

CampusNexus Student provides features that manipulate data entered so that the business rules for each application are followed. For example, the lengths of Staff Codes across applications are not the same; therefore, the system checks the lengths of Staff Codes for the application, and then alerts the system administrator when a Staff Code is entered with a length greater than the maximum length allowed for the application.

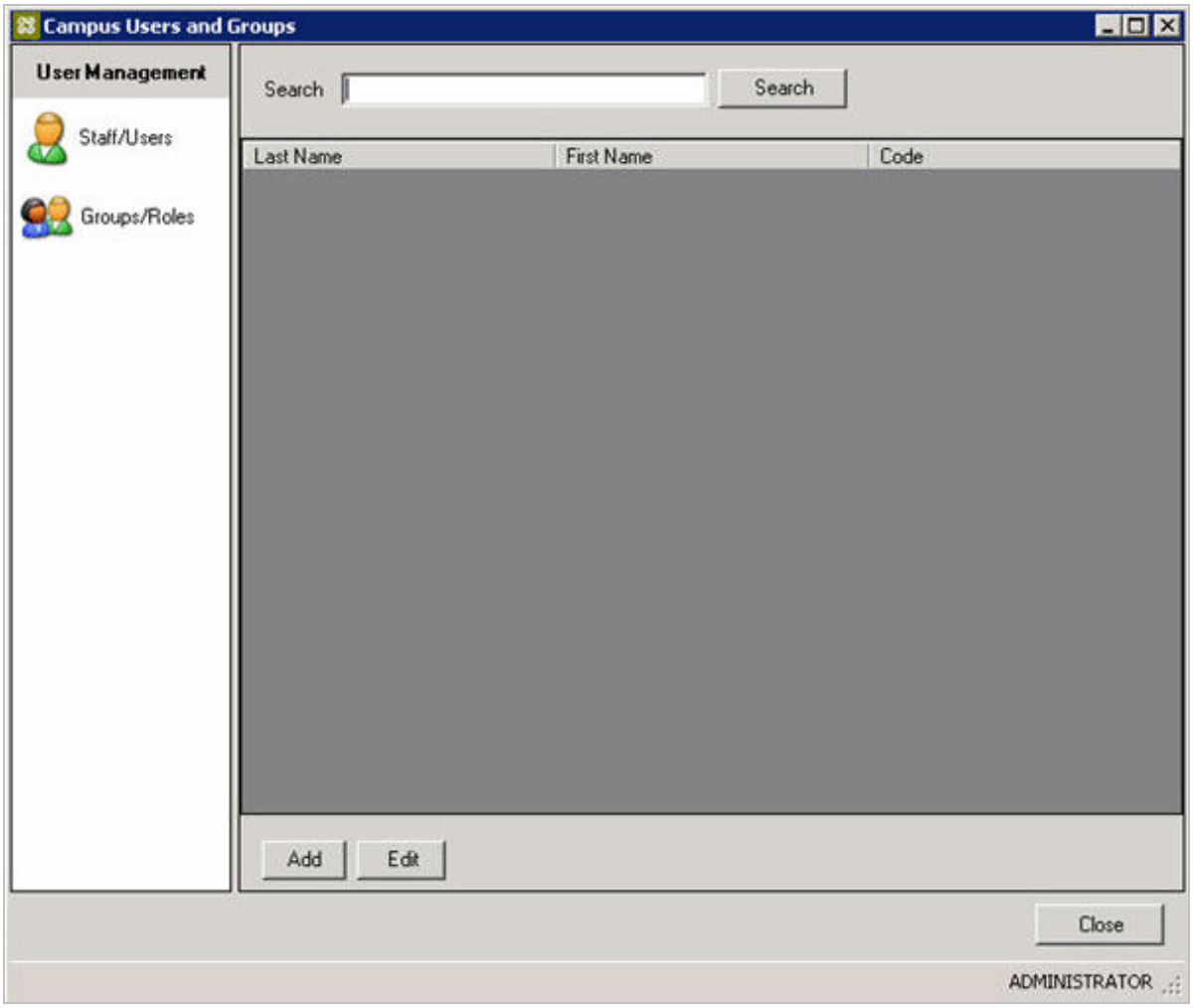
Integration with Active Directory

CampusNexus Student integration with Active Directory for faculty staff members involves authentication and authorization. Authorization and authentication are two of the elements of a framework that controls access to the application resources. The system enforces security policies to ensure that each user has enough rights to carry out his/her daily tasks.

Authentication defines a way to identify a single user. This is done by matching a user name and password with a faculty member's staff member record in the Staff Information form. If the user provides valid credentials, the access is granted.

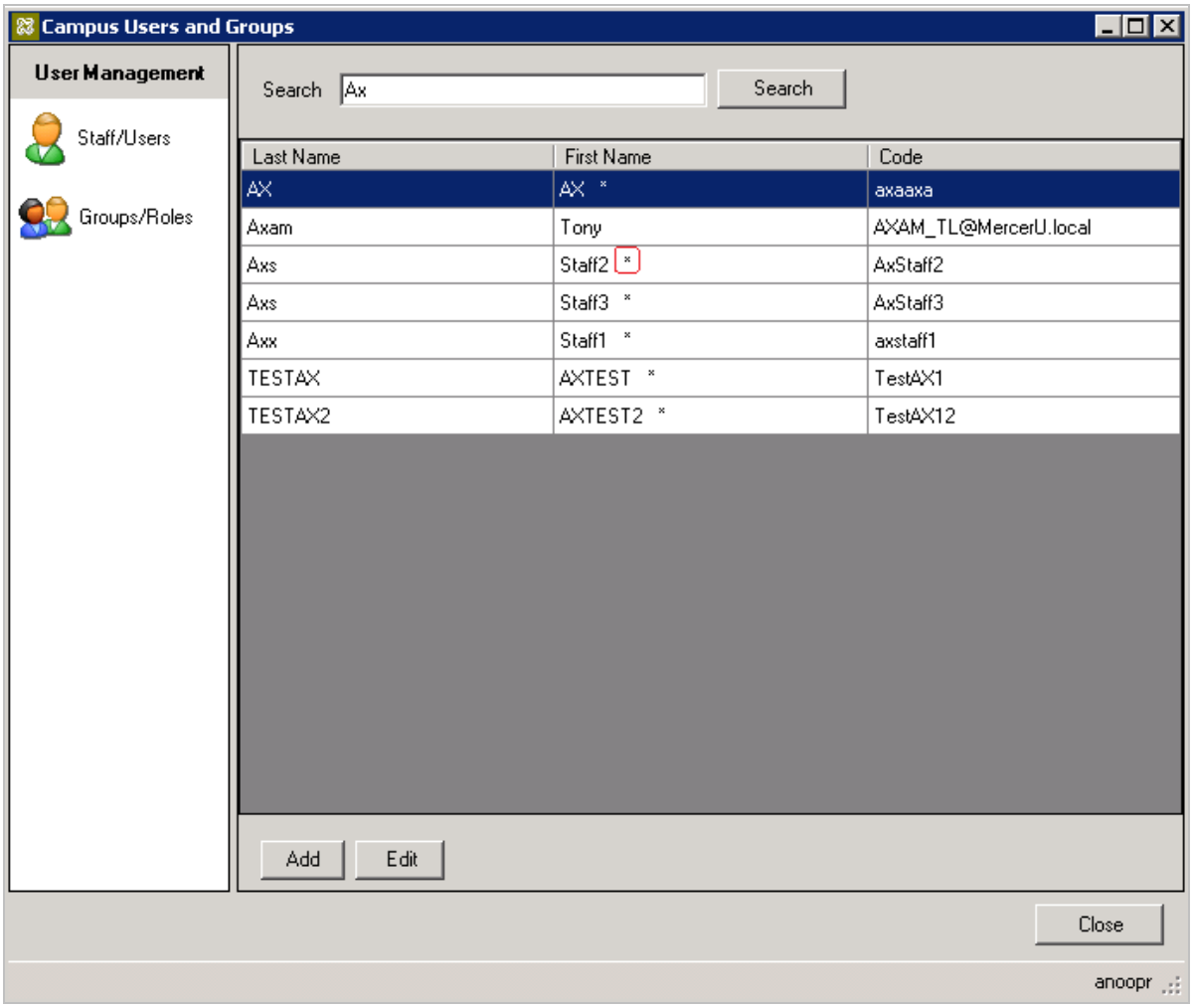
To set up access to Anthology Inc. products:

1. As a system administrator, navigate to **Setup > Central Security**. The Campus Users and Groups form is displayed.



2. Click the **Staff/Users** option and then click **Search**. The user's Last Name, First Name, and Codes are listed. The Code column contains the Staff Code of the user.

   If Faculty Management Integration for CampusNexus Finance, HR & Payroll is enabled (see Academic Records Settings - General Tab), instructors created in CampusNexus Finance, HR & Payroll are marked with an asterisk (*) as shown below. These instructors must be assigned to Campus Groups in CampusNexus Student. See Assigning Staff Permissions.



3. Click **Add** to add a new user, or select an existing staff member and click **Edit**.

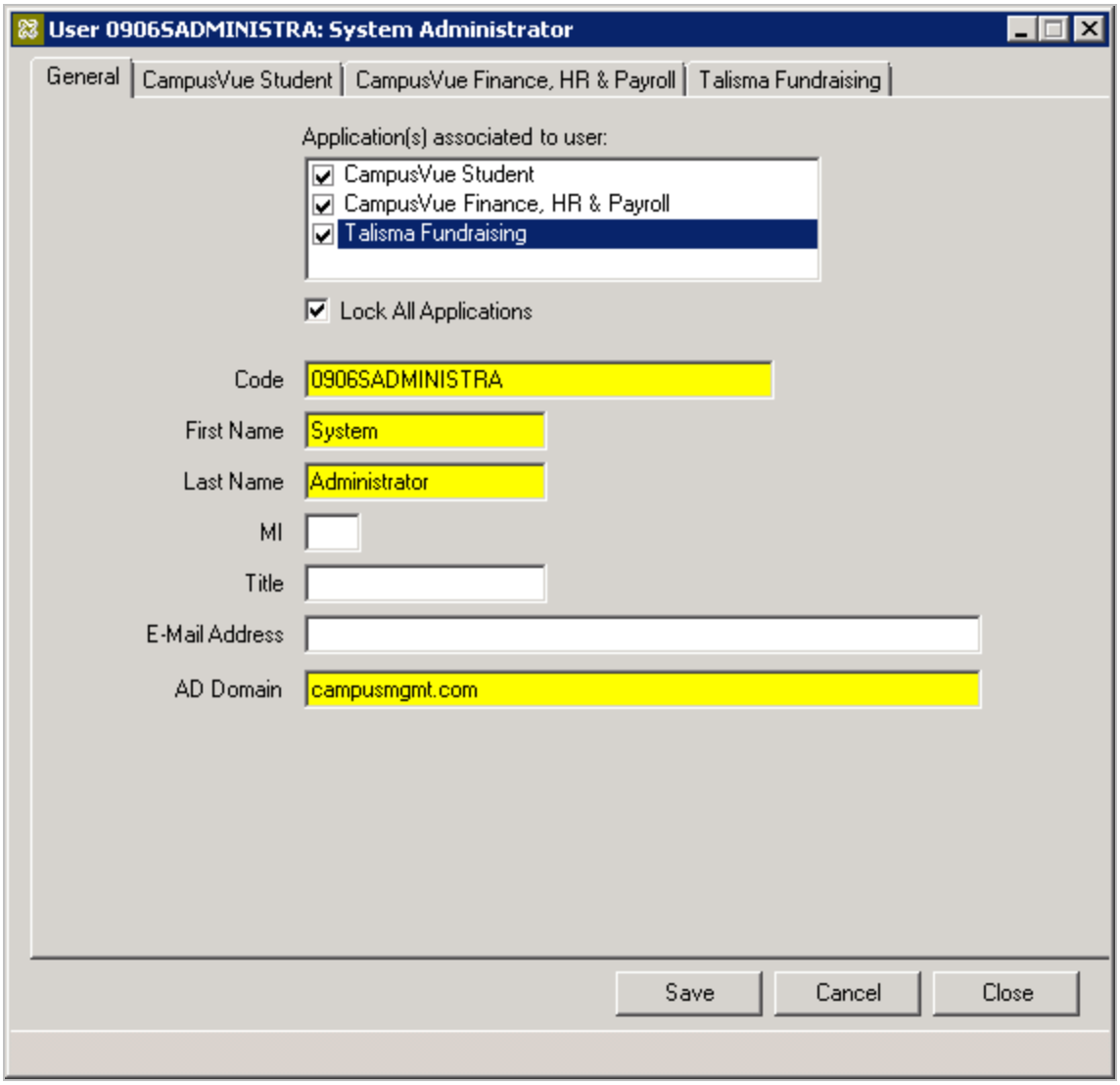
   If Active Directory is enabled:

   - The Change Password button is not displayed.
   - The Password fields is not displayed.
   - The **AD Domain** field is required.

   Assign new users to the applications that they will use on a regular basis by selecting appropriate applications.

   The applications selected dictate which tabs are enabled. If all Anthology Inc. products are used, the form contains the following tabs:

   - General
   - CampusNexus Student
   - CampusVue Finance, HR & Payroll
   - Talisma Fundraising
   - Portal



4. On the **General** tab, select the **Lock All Applications** option to disable all tabs within the form and thereby lock all end-users out of all applications.

   Select applications and assign login codes that enable the Administrator to access the applications.

   - For Talisma Fundraising, the login code can have up to 15 characters.
   - For CampusVue Finance, HR & Payroll, the login code can have up to 25 characters.
   - For CampusNexus Student, the login code can have up to 50 characters.

   If more than one application is selected, the code is limited to the minimum length of the selected applications. Therefore, if all three are selected, the Login Code can be no longer than 15 characters.

   Since the application adds only Staff members to Portal, the 50-character limit is enforced. Students continue to be added via Portal.

   This information can be edited from the Central Security Application, but is displayed in read-only mode on the application-specific maintenance screens.

5. On the **CampusNexus Student** tab, assign staff groups, change passwords, and lock users out of CampusNexus

Student.

When the Central Security Application is used, the Staff Information form contains only General, User Info, and Contact Manager tabs.

When CampusVue Finance, HR & Payroll is used with CampusNexus Student, an upgrade script creates the new users in CampusVue Finance, HR & Payroll. Only the users that will be using CampusVue Finance, HR & Payroll should be included in the list of end-users.

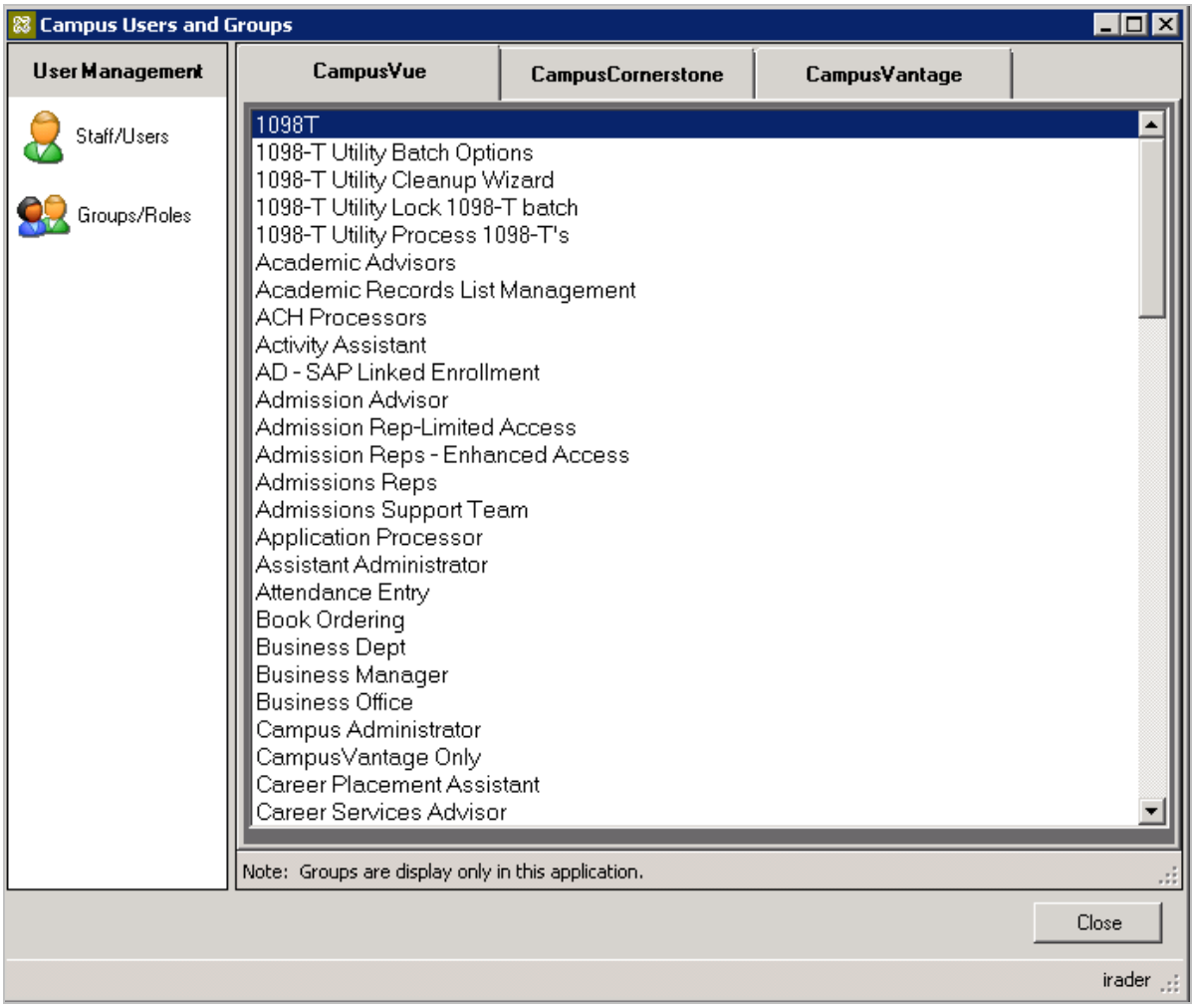
6. On the **CampusVue Finance, HR & Payroll** tab, administer primary menus and navigation groups, change passwords, and lock the end-user out of the application.

   Note: The User Profile form in CampusVue Finance, HR & Payroll is displayed in read-only mode when the Central Security Application in CampusNexus Student is used. The Set Password and Navigation Groups fields are not displayed.

7. On the **Talisma Fundraising** tab, assign users to a Talisma Fundraising security group, change their passwords, and lock them out of the application.

8. On the **Portal** tab, assign users to roles and change passwords.

9. **Groups and Roles** vary between Anthology Inc. products. The Groups and Roles options are displayed in read-only mode and may not be edited within the Central Security Application.


Campus Users and Groups
User Management
Staff/Users
Groups/Roles
CampusVue
CampusCornerstone
CampusVantage
1098T
1098-T Utility Batch Options
1098-T Utility Cleanup Wizard
1098-T Utility Lock 1098-T batch
1098-T Utility Process 1098-T's
Academic Advisors
Academic Records List Management
ACH Processors
Activity Assistant
AD - SAP Linked Enrollment
Admission Advisor
Admission Rep-Limited Access
Admission Reps - Enhanced Access
Admissions Reps
Admissions Support Team
Application Processor
Assistant Administrator
Attendance Entry
Book Ordering
Business Dept
Business Manager
Business Office
Campus Administrator
CampusVantage Only
Career Placement Assistant
Career Services Advisor
Note: Groups are display only in this application.
Close
irader

Setup > Security

Security in CampusNexus Student is managed at several levels. You can designate the access level by staff group or menu (View, Lists, Daily, Reports, Tools, Setup). You can also designate the access level for each menu item to control access to certain menu functions based on group membership.

The access levels are None (system default), Full, Display, Edit, Add, Delete, and Print.

- "None" means that the members of the group cannot access menu options, forms, buttons, and so on.
- "Full" means that the members of the group can display, add, edit, delete, and print data for the full-access menu options. If you do not want to grant full access to certain parts of the system, you can select among the add, edit, delete, and print options.

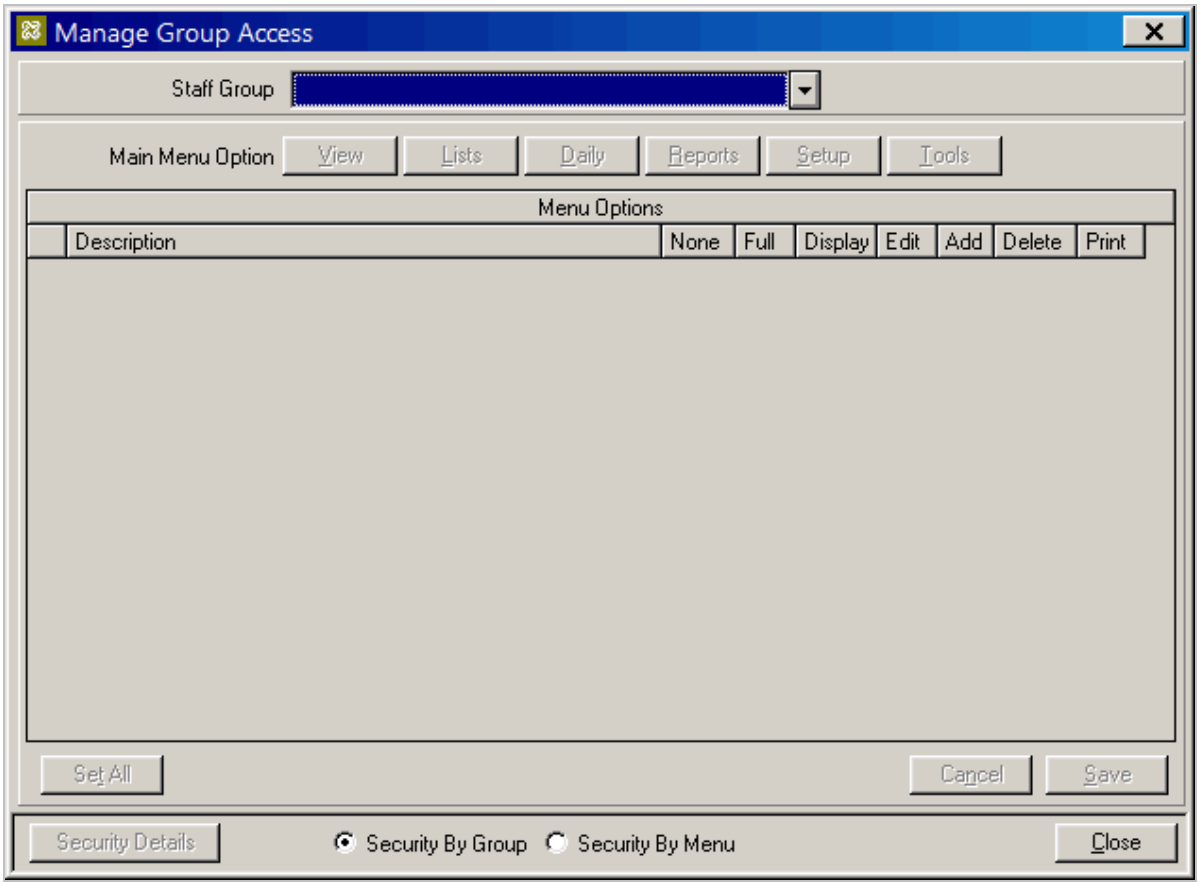
The system administrator has full access. Other groups may have full access to some menu options but lower levels of access to other menu items.

When a staff person is a member of more than one group, that person's security level is governed by the group that has the most access. For example, Able Baker is in the instructor group and the advisor group. Instructors cannot see the Lists menu, but advisors have full access to it. Able Baker has full access to the Lists menu.

Note: To protect students' privacy, staff members and staff groups are prevented from viewing, printing, or exporting Social Security Numbers (SSNs), unless the System Administrator has set up permissions for these functions. See Social Security Number (SSN) Handling in CampusNexus Student.

To manage security access:

1. Navigate to **Setup > Security**. The Manage Group Access form is displayed.



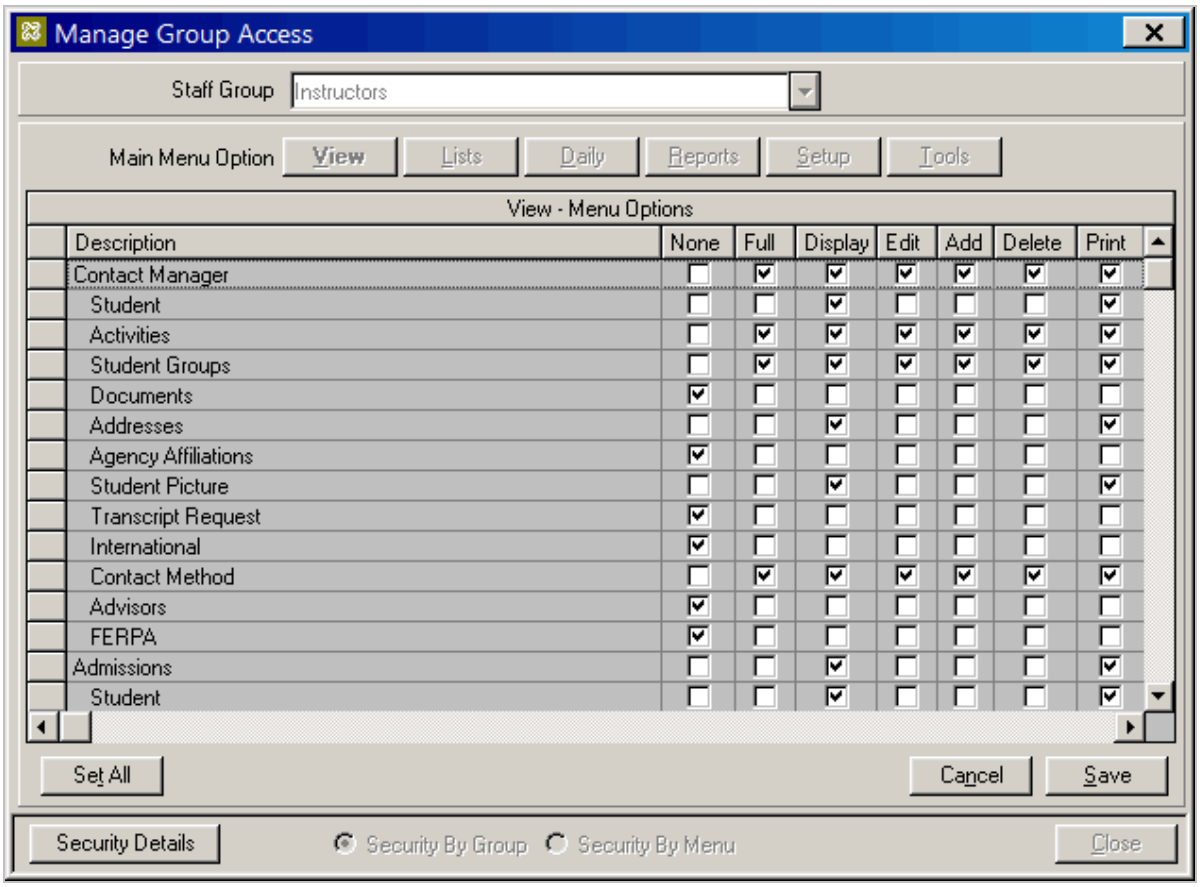
Note: When you edit a security settings, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.

Continue with the following instructions as appropriate:

- To set up access by staff group:
- To set up access by menu:
- To set up access for shared groups:
- To set up delete letter permission by staff group:
- To set up delete letter permission by menu option:
- To run the Security Details report:

To set up access by staff group:

2. Select **Security By Group**.
3. Select the **Staff Group** for which you want to set up security.
4. Click each of the **Main Menu Options** and select the level of access for each menu option. The levels are None, Full, Display, Edit, Add, Delete, and Print.



When you select a security option for a high-level menu option, the selected security option is applied to the lower-level menu options. You can change the lower-level menu options to a security option lower than the high-level menu options, but you cannot change a low-level option to a security option higher than the menu option above it. In the example, instructors have full access to all the Contact Manager View options. You could not give the instruct-

ors Full access to Student fields under Admissions because they only have Display access to the Admissions module.

5. (*Optional*) Click **Set All** to apply the selected level of access to all staff groups. For example, if you click Full for View Contact Manager and then click Set All, all menu options on the View menu are set to Full.
6. Click **Save**.

To set up access by menu:

2. Select **Security By Menu**.
3. Click the appropriate Main Menu Option button (**View**, **Lists**, **Daily**, **Reports**, **Setup**, or **Tools**).
4. Select the **Menu Options** from the drop-down list.
5. Select each of the **Staff Groups** and select a **level of access** for each group. The levels are None, Full, Display, Edit, Add, Delete, and Print.
6. (*Optional*) Click **Set All** to apply the level of access to all staff groups.
7. Click **Save**.

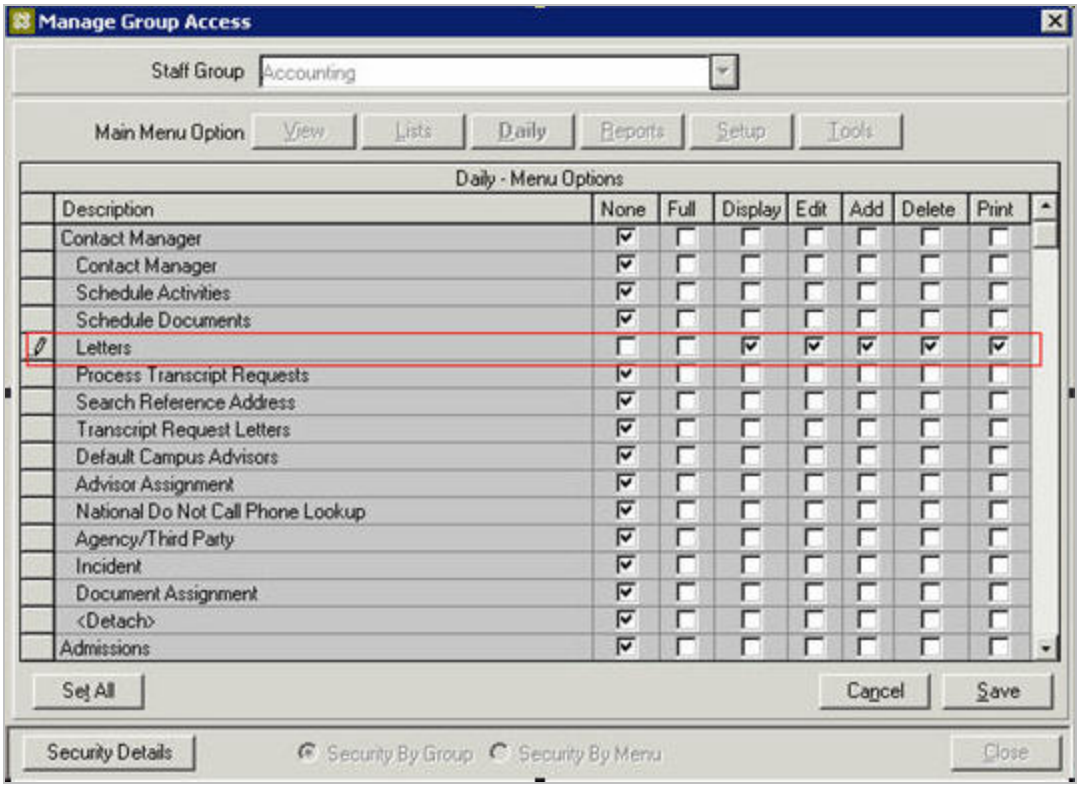
To set up access for shared groups:

There is sometimes a need to allow security rights across separate staff groups. For example, the **Progress Report** provides Financial Aid and Academic Records information for multiple student's. To allow printing of the Progress Report for both the Financial Aid and Academic Records Groups:

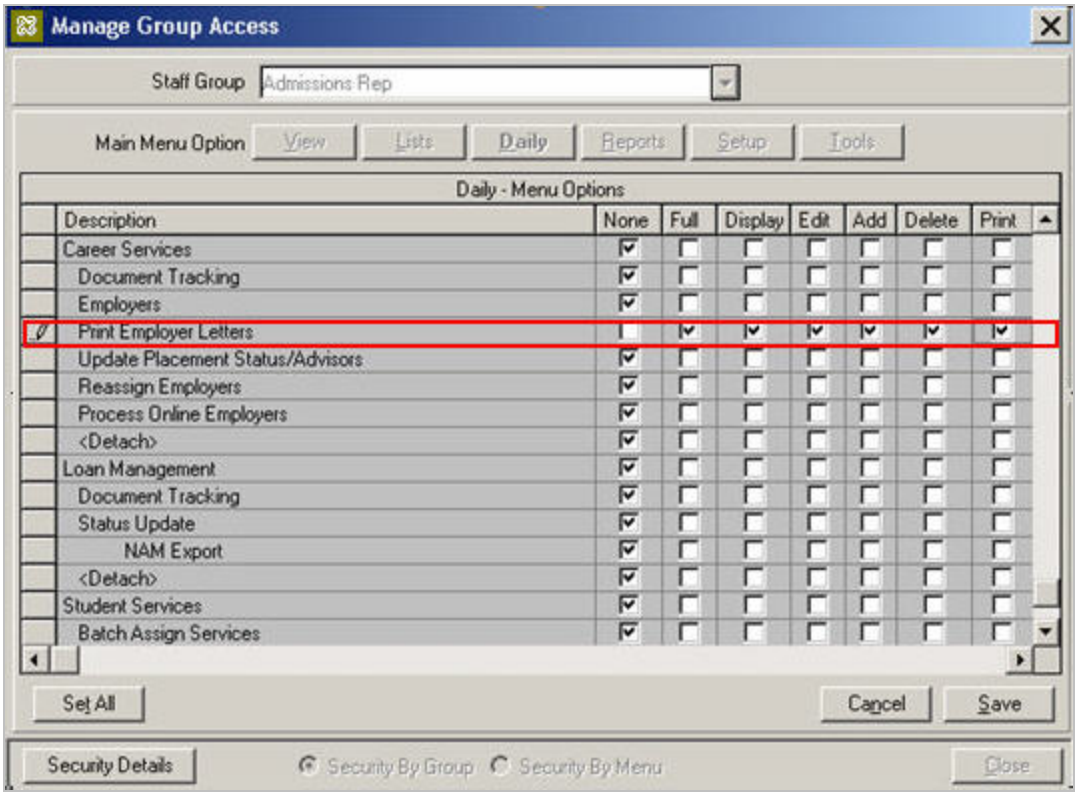
2. Select **Security By Group**.
3. Select a **Staff Group**.
4. Click the **Reports** Main Menu Option.
5. Select the **Print** check box to the right of the Progress Report listing.
6. Click **Save**.
7. Repeat these steps for Staff Groups associated with Academic Records that also have permission to print the Progress Report.

To set up delete letter permission by staff group:

2. Select the **Security By Group** option.
3. Select a **Staff Group**.
4. Click the **Daily** button.
5. In the Contact Manager section, line item Letters, select the **Delete** column.

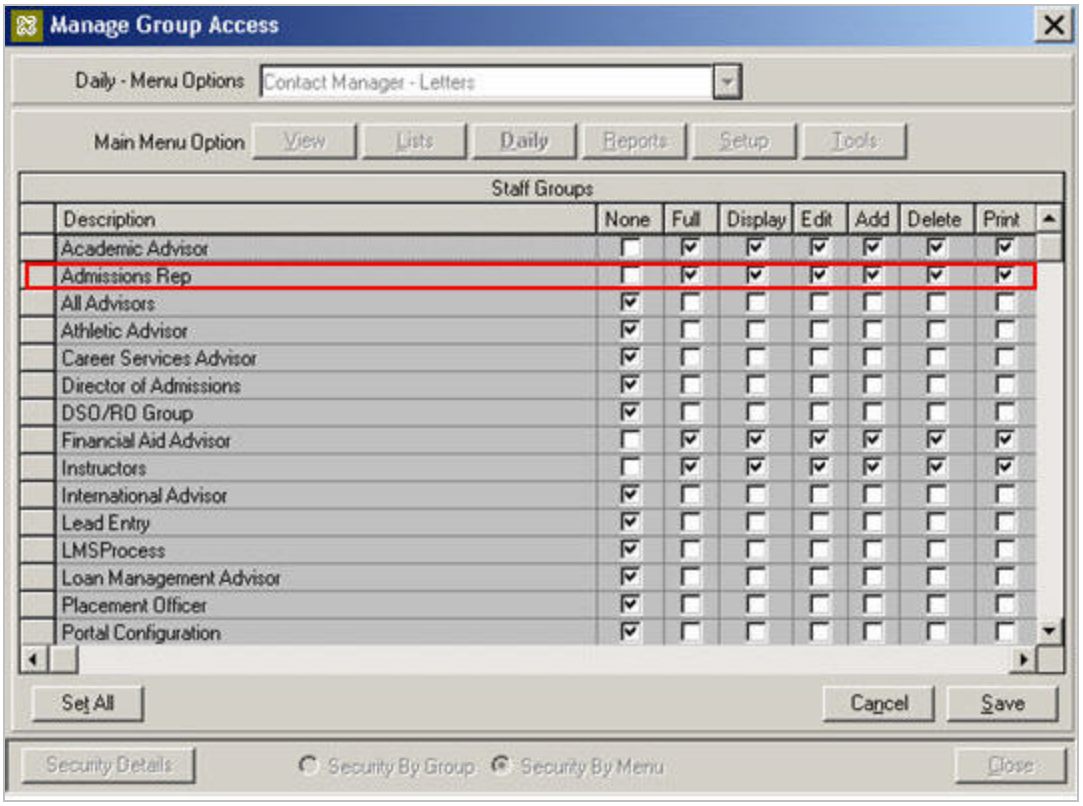


6. Repeat these steps for each staff group that you would like to give permission to delete form letters.
7. In the Career Services section, line item Print Employer Letters, select the **Delete** column.

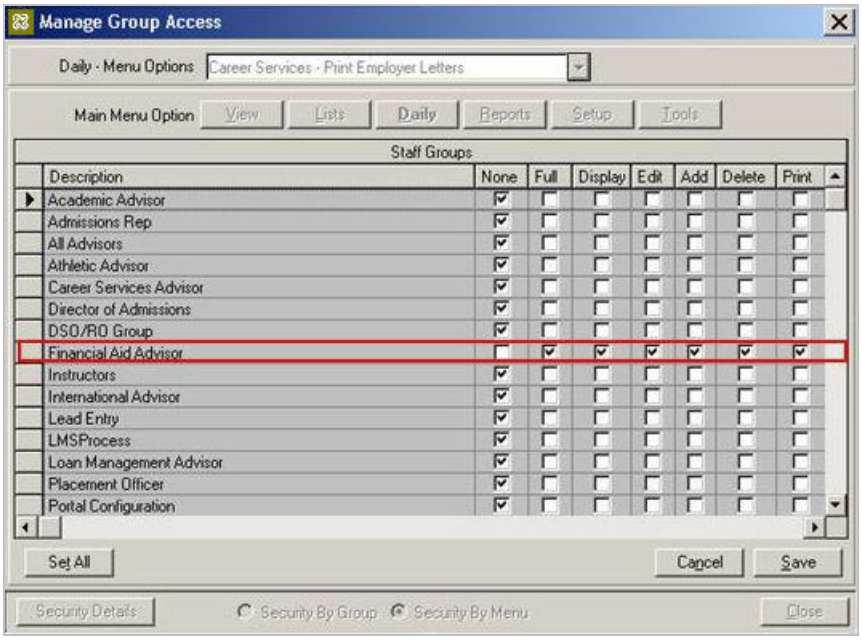


To set up delete letter permission by menu option:

2. Select the **Security By Menu** option.
3. Click the **Daily** button.
4. The Daily - Menu Options drop-down contains a list of Daily menu options. Select **Contact Manager - Letters** from the list. A list of staff groups is displayed.



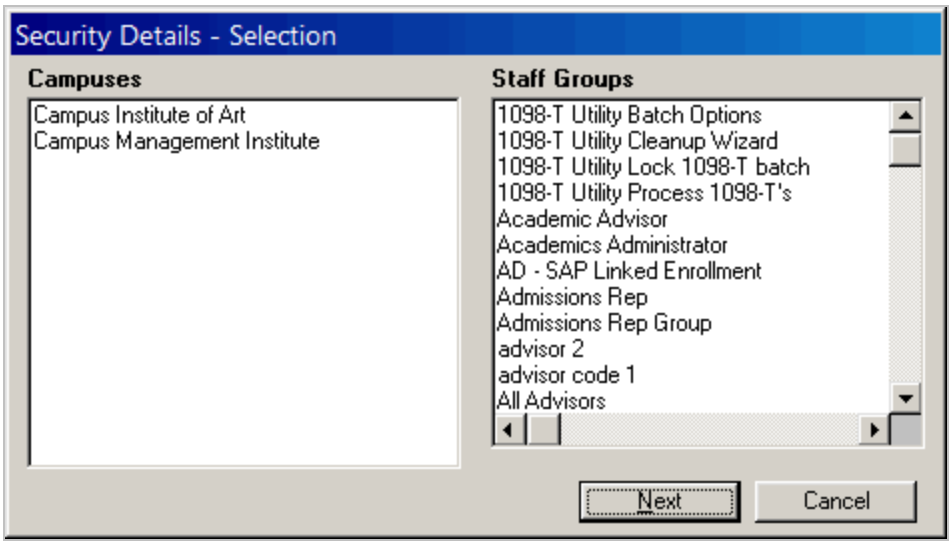
5. For each staff group that you want to give permission to delete form letters, select the **Delete** column.
6. Repeat these steps for each staff group that you would like to give permission to delete form letters.
7. For Employer form letters repeat these steps, but select **Career Services - Print Employer Letters** from the **Daily - Menu Options** drop-down list, and then assign permission to the staff group.



8. Repeat these steps for each staff group that you would like to give permission to delete form letters.

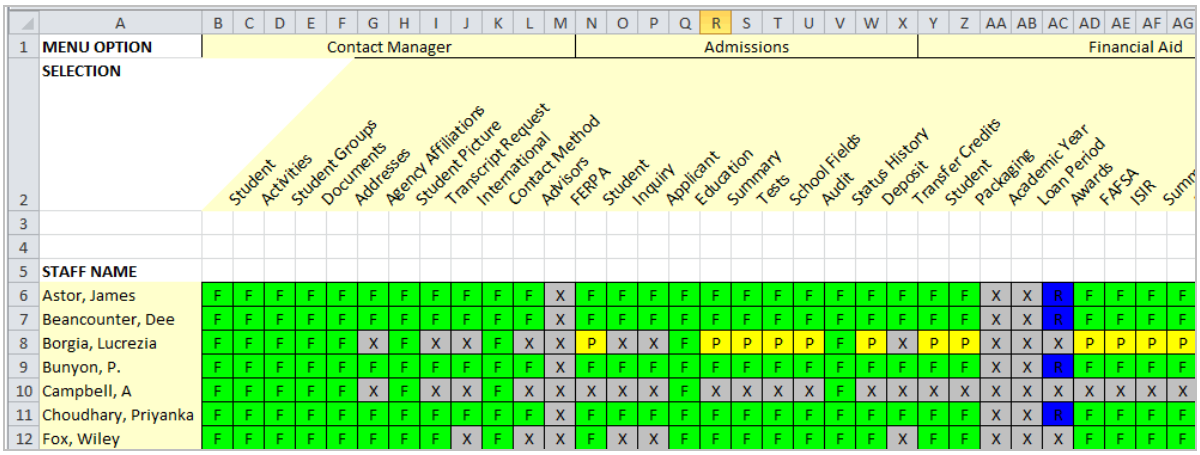
To run the Security Details report:

2. Select **Security By Group**.
3. Select a **Staff Group**.
4. Select a **Main Menu Option**.
5. Click **Security Details**. The Security Details - Selection form is displayed.



6. Select the **Campuses** and **Staff Groups** for which to run the report.
7. Click **Next**. The list of users in the previously selected campuses and groups is displayed.
8. Select the **Users** to be included in the report.

9. Click **OK**. CampusNexus Student extracts the security data for the selected users. Progress messages appear in the status bar of the main window. When the data extraction is complete, CampusNexus Student opens Microsoft Excel and loads a worksheet with the extracted data.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG
1	**MENU OPTION**	Contact Manager												Admissions											Financial Aid								
2	**SELECTION**	Student	Activities	Student Groups	Documents	Addresses	Agency Affiliations	Student Picture	Transcript Request	International	Contact Method	Advisors	FERPA	Student	Inquiry	Applicant	Education	Summary	Tests	School Fields	Audit	Status History	Deposit	Transfer Credits	Student	Packaging	Academic Year	Loan Period	Awards	FAFSA	ISIR	Summ		
3																																	
4																																	
5	**STAFF NAME**																																
6	Astor, James	F	F	F	F	F	F	F	F	F	F	F	X	F	F	F	F	F	F	F	F	F	F	F	F	F	X	X	R	F	F	F	F
7	Beancounter, Dee	F	F	F	F	F	F	F	F	F	F	F	X	F	F	F	F	F	F	F	F	F	F	F	F	F	X	X	R	F	F	F	F
8	Borgia, Lucrezia	F	F	F	F	F	X	F	X	X	F	X	X	P	X	X	F	P	P	P	P	F	P	X	P	P	X	X	X	P	P	P	P
9	Bunyon, P.	F	F	F	F	F	F	F	F	F	F	F	X	F	F	F	F	F	F	F	F	F	F	F	F	F	X	X	R	F	F	F	F
10	Campbell, A	F	F	F	F	F	X	F	X	X	F	X	X	X	X	X	F	X	X	X	X	F	X	X	X	X	X	X	X	X	X	X	X
11	Choudhary, Priyanka	F	F	F	F	F	F	F	F	F	F	F	X	F	F	F	F	F	F	F	F	F	F	F	F	F	X	X	R	F	F	F	F
12	Fox, Wiley	F	F	F	F	F	F	F	F	X	F	X	X	F	X	X	F	F	F	F	F	F	F	X	F	F	X	X	X	F	F	F	F

Legend: F = Full access, P = Print (display) access, and X = No access (none).

Sign In

Before you can use the system, CampusNexus Student must know who you are. It must set up your "profile". Staff members, known as "users", use CampusNexus Student for differing purposes. To make the appropriate data available to you as a "user", the system administrator (SA) assigns you an identifier code and password. The system administrator also assigns you to one or more groups of users with common characteristics and data needs. Security and access to data in CampusNexus Student is based on these staff member user groups.

CampusNexus Student provides the following authentication modes:

- Use CampusNexus Student Database
- Use Windows Login (Non-AD)
- Use Active Directory
- Use Active Directory (single sign on)

In Use CampusNexus Student Database or Use Windows Login (Non-AD) authentication mode, the Sign In form prompts the user for the CampusNexus Student user name and password.

Use CampusNexus Student Database Sign In

If the system is in Use CampusNexus Student Database authentication mode, the User Name field is *enabled* and the **User Name** and **Password** may be entered according to the staff maintenance form or central security application for CampusNexus Student.

Use Windows Login (Non-AD) Sign In

Some system administrators set up the CampusNexus Student security system so that if you can log in to the school's computer network, you can start CampusNexus Student without further identification. This is referred to as using Windows security for user identification. In this case, you are not required to enter your user ID and password. Otherwise, follow the sign in (or log in) instructions.

To sign in (or log in) to CampusNexus Student:

1. Double-click the CampusNexus Student icon on your desktop. The **CampusNexus Student Sign In form** is displayed.

   Note: If the CampusNexus Student icon is not on your desktop, ask your system administrator to install the CampusNexus Student client software.

2. Enter the **User ID** provided by your system administrator. Upper case, lower case, or mixed case letters are permissible.

3. Enter your **Password**. Upper case, lower case, or mixed case letters are permissible. The password will not be shown in clear text on the form. Asterisks (*) will be substituted for the characters of your password.

   Note: For information on changing your password, see Modifying Your Password.

4. Press **Enter** or click **Sign In**. CampusNexus Student initialize values needed for processing while you are working in the system.

5. If you entered a user ID and/or password that CampusNexus Student does not recognize, you are prompted to re-enter your credentials.

6. Once the initialization values are loaded, the main window is displayed on your desktop.

7. Depending on your individual user setup parameters, you may see your session parameters form. You can change the default Campus, Term, Financial Aid Year, and Change Password before continuing to open CampusNexus

Student.

Note: To change your own password, the system administrator must modify your profile.

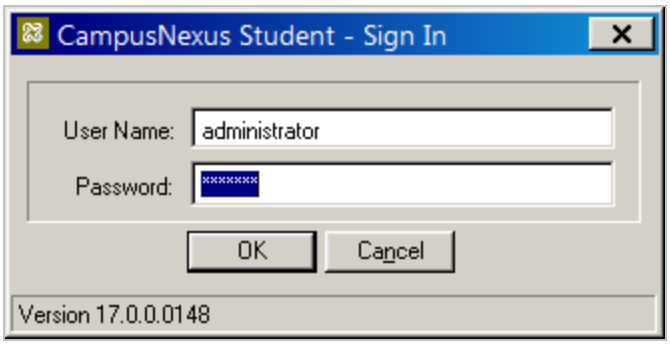
8. If you decide not to sign in after opening the Sign In form, click **Cancel** to close the form and return to your desktop.

Note: If you need to know about the system you are logging into before you do so, press **Ctrl+I** while the **CampusNexus Student Sign In form** is open. An information window is displayed. Click **OK** to close the window.

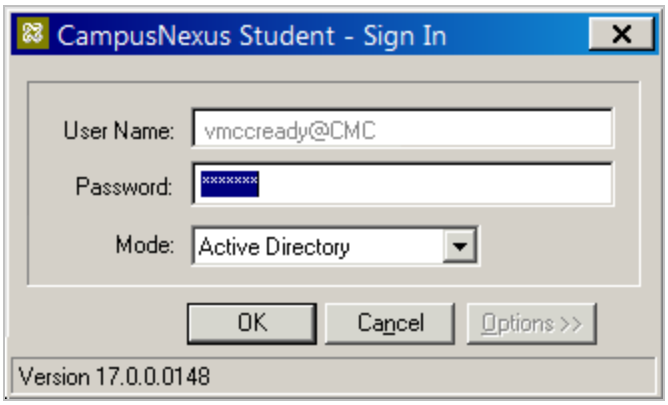
Use Active Directory Sign In

When Use Active Directory authentication mode is enabled, the domain User Name field is *disabled* when the user logs into CampusNexus Student. The user only needs to enter the Password.

For Active Directory Sign In, the user needs to enter the domain password to sign in. The user can also click the Options >> button and select the Use CampusNexus Student Database option to switch authentication modes. This allows the user to use the "Administrator" account. The Administrator will not be a domain account, and remains a CampusNexus Student database account. Using the Options >> button, and selecting the Use CampusNexus Student Database option, is the only way to sign in as Administrator when Active Directory is *enabled*. The user will not see the Sign In form, and will be presented with the Main CampusNexus Student form instead when in Active Directory mode.



Click **Options>>** to change the current authentication mode to Use CampusNexus Student Database.



If you cannot access CampusNexus Student in Active Directory mode, click **Options>>** , select the Use CampusNexus Student Database option from the **Mode**, enter the CampusNexus Student user name and password, and click **OK**.

Use Active Directory (single sign on) Sign In

When Active Directory is *enabled* (single sign on or otherwise), the user is prompted with the user's Windows ID including the @domain. The User Name is disabled. For single sign on, the form attempts to validate the user@domain, and if valid, the form is hidden, and the main CampusNexus Student form is displayed. This allows the user to use the "Administrator" account. The Administrator will not be a domain account and remains a CampusNexus Student database account. Using the Option "CampusNexus Student Database Mode" is the only way to sign in as Administrator when Active Directory is enabled. The user will not see the Sign In form and will be presented with the Main CampusNexus Student form.

Setup > Status Codes

Status codes are essential in tracking the progress of a student through your institution by using CampusNexus Student. At each step of the student's processing, the student is changed from one status to the next in an orderly fashion. Initialize your student tracking feature by setting up the necessary user-defined status codes under Setup > Status Codes. The form contains the following tabs:

- Status Codes
- Status Changes
- Colors

Additional settings related to status codes are configured under Setup > Academic Records.

To set up tracking for non-degree seeking students, see Tracking Non-Degree-Seeking (NDS) Students.

Status Codes - Status Codes Tab

CampusNexus Student provides the status categories and system statuses, but you must create the status codes for your institution.

Definitions:

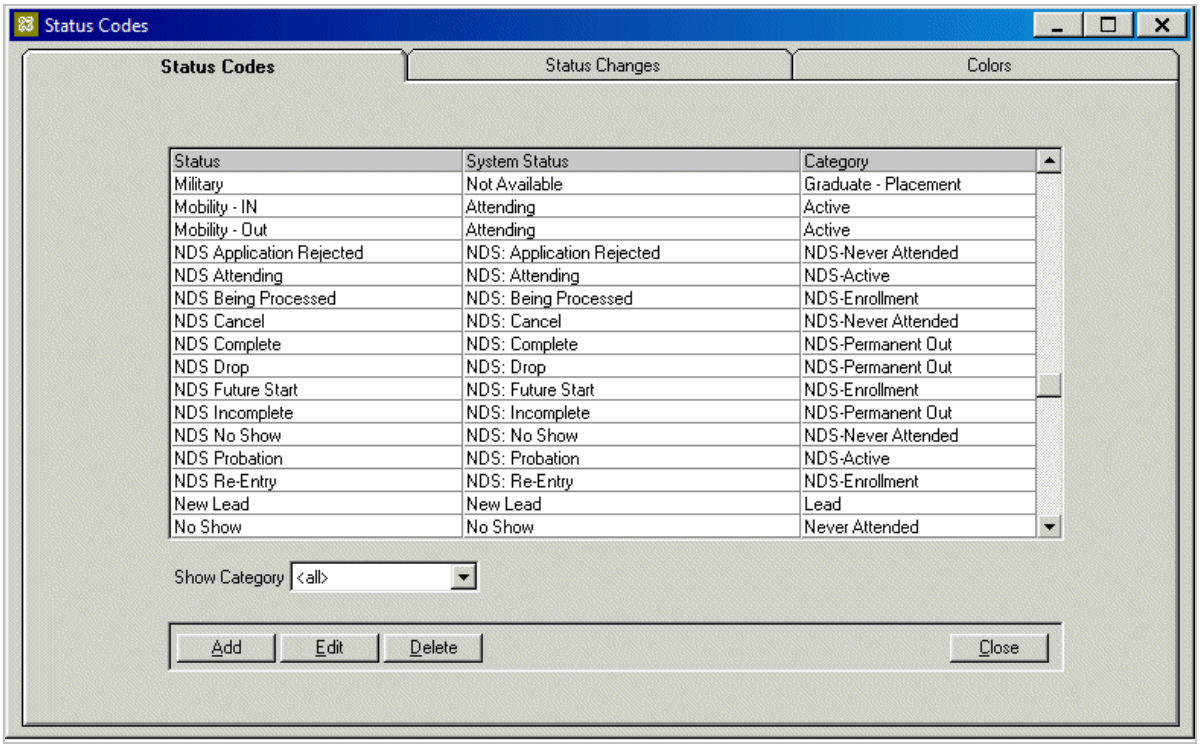
- **School Status** or **Student Status** – defined by an institution to represent their terminology as it relates to the various stages of the student life cycle.
- Status Category – hard-coded value that cannot be changed. Each system status rolls up to a pre-determined category.
- System Status – hard-coded value that cannot be changed. Each school status must be assigned to the appropriate system status. The hierarchy logic (see Status Hierarchy) determines which school status will be considered the default when multiple school status records exist.

The system administrator (SA) can edit the school-defined status codes and descriptions. They are shown in the left-hand column on the Status Codes form. The SA can also edit the descriptions of default codes to fit the terminology of your institution. New codes can be added and unused codes can be deactivated or deleted. See Manage School Statuses.

Study your school-defined status code schema carefully before you set it up. Once you begin using CampusNexus Student and students migrate from one status to another, it becomes very difficult to change the precedence of the status codes. Especially, do not change a school-defined status code from one category to another after students have been assigned the status. In this case, deactivate the old status code under the first category and create a new status code under the second category.

Status Codes for Non-Degree Seeking Students

You must initialize your NDS Student tracking feature by setting up the necessary user-defined status codes. CampusNexus Student provides the status categories and system statuses, but you must create (add) the status codes for your school. The illustration below shows some of the user-defined NDS status codes in a sample database.



Status Category

At the very foundation of the status code system are the status categories. Status categories are fixed in CampusNexus Student so that the system will always understand in which category each lead or student is classified at any given time.

The status categories ares:

- **A** - Active
- **C** - Applicant Processing
- **E** - Enrollment
- **G** - Graduate - Placement
- **I** - InSchool - Placement
- **L** - Lead
- **N** - Never Attended
- **P** - Permanent Out
- **T** - Temporary Out
- **W** - NDS - Never Attended
- **X** - NDS - Enrollment
- **Y** - NDS - Active
- **Z** - NDS - Permanent Out

System Status

The system statuses are at the intermediate level of the status code hierarchy. Each system status is related to a status category. Any one status category can be related to one or many system statuses. For instance, the system statuses: New Lead, Interview Scheduled, and Interviewed are all related to the Lead category.

System statuses and their relationships to categories are defined by CampusNexus Student to maintain consistency throughout the system. Many displays and reports are based on these relationships.

Relationship between System Status and Status Category

System Status	Status Category
Application Not Accepted	Never Attended
Application Received	Applicant Processing
Attending	Active
Being Processed	Enrollment
Cancel	Never Attended
Complete	Permanent Out
Currently Placed	Graduate - Placement
Drop	Permanent Out
Future Start	Enrollment
Graduate	Permanent Out
In School Not Available	InSchool - Placement
In School Not Yet Placed	InSchool - Placement

System Status	Status Category
In School Placed	InSchool - Placement
Incomplete	Permanent Out
Interview Scheduled	Lead
Interviewed	Lead
Leave of Absence	Temporary Out
NDS: Application Rejected	NDS - Never Attended
NDS: Attending	NDS - Active
NDS: Being Processed	NDS - Enrollment
NDS: Cancel	NDS - Never Attended
NDS: Complete	NDS - Permanent Out
NDS: Drop	NDS - Permanent Out
NDS: Future Start	NDS - Enrollment
NDS: Incomplete	NDS - Permanent Out
NDS: No Show	NDS - Never Attended
NDS: Probation	NDS - Active
NDS: Re-entry	NDS - Enrollment
New Lead	Lead
No Show	Never Attended
Not Available	Graduate - Placement
Not Yet Placed	Graduate - Placement
Pending Applicant	Applicant Processing
Probation	Active
Re-Entry	Enrollment
Standard Period of Non-Enrollment	Temporary Out
Transfer from Other Campus	Enrollment
Transfer from Other Program	Enrollment
Transfer to Other Campus	Permanent Out
Transfer to Other Program	Permanent Out

Status Hierarchy

CampusNexus Student has built-in hierarchy logic to determine which school status will be considered the default when multiple school status records exist. As a result, the student master form will display the school status based on this logic. In addition, the default enrollment and/or applicant record will be pre-selected when multiple enrollment and/or application records exist for a student record.

When multiple school statuses exist for a student's record, the school status associated with a system status with the lower hierarchy value will be considered the default record. For example, a student that has graduated and is also currently applying for a new program has the following school statuses:

School Status	System Status	Category
Graduated	Graduate	Permanent Out
Application in Progress	Application Received	Applicant Processing

The school status reflected on the student master form would be Application in Progress based on the table below since the system status assigned to it has a value of 16 which is lower than the Graduated school status which has a value of 19. Forms that display enrollment/application records will default based on this hierarchy; the other record would need to be manually selected to display the associated data.

The following table represents the hard-coded hierarchy value associated with each system status:

System Status	Hierarchy Value
New Lead	0
Interview Scheduled	0
Interviewed	0
Not Yet Placed	0
Currently Placed	0
Not Available	0
Attending	1
NDS: Attending	2
Probation	3
NDS: Probation	4
Leave of Absence	5
Standard Period of Non-Enrollment	7
Future Start	9
NDS: Future Start	10
Being Processed	11
NDS: Being Processed	12

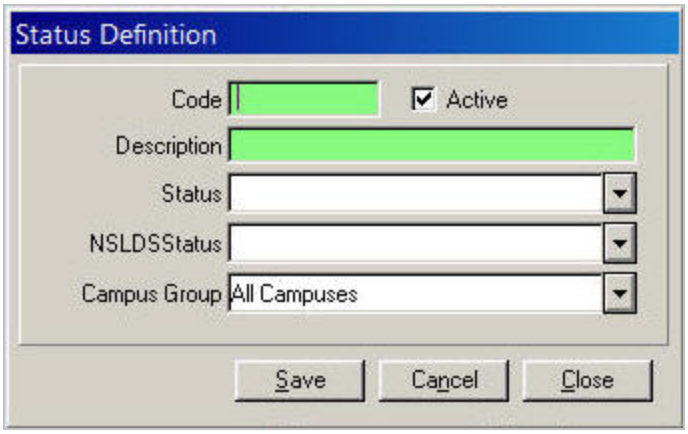
System Status	Hierarchy Value
Re-Entry	13
NDS: Re-Entry	14
Application Received	16
Pending Applicant	17
Graduate	19
Complete	21
NDS: Complete	22
Incomplete	23
NDS: Incomplete	24
Drop	25
NDS: Drop	26
Application Not Accepted	31
NDS: Application Rejected	32
No Show	33
NDS: No Show	34
Cancel	35
NDS: Cancel	36
Transfer To Other Program	37
Transfer To Other Campus	37
Transfer From Other Program	37
Transfer From Other Campus	37
InSchool Placed	38
InSchool Not Yet Placed	39
InSchool Not Available	40

Manage School Statuses

Add or edit a status code and definition

1. Navigate to **Setup > Status Codes**. The Status Codes form is displayed.
2. Select the **Status Codes** tab.

3. Click **Add**, or select a record and click **Edit**. The Status Definition form is displayed.



4. Specify a unique **Code**.
5. Enter a **Description**.
6. Select a **System Status**.
7. Select an **NSLDS Status** that will be associated with the **System Status**. The status is assigned by the National Student Loan Data System (NSLDS) to be used for SSCR Processing.
8. Select a **Campus Group**.
9. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
10. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Deactivate a school-defined status code definition

Deactivating a status code definition is the preferred method of dealing with a code that is no longer needed at your institution. For the purposes of record keeping and historical accuracy, deletion of a code that has been used in the past is not a wise thing to do.

1. Navigate to **Setup > Status Codes**. The Status Codes form is displayed.
2. Select the **Status Codes** tab.
3. Select the **Status Code Description** to be deactivated.
4. Click **Edit**. The Status Definition form is displayed with the current definition data.
5. Clear the **Active** check box.
6. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Delete a school-defined status code definition

Note: The preferable method of dealing with status definitions that are no longer need is to deactivate them. When deactivated, they remain on file for historical reference. You can delete Status Code Definitions, but the System Statuses and System Categories associated with them will not be deleted.

1. Navigate to **Setup > Status Codes**. The Status Codes form is displayed.
2. Select the **Status Codes** tab.
3. Select the **Status Code Description** to be deleted.

4. Click **Delete**.
5. A confirmation message is displayed. Click **Yes**. The status definition is removed from the list.

Status Codes - Status Changes Tab

The system administrator (SA) can control which status changes can occur in your institution and which groups of staff members can initiate them. The rules in this table control which current status can be changed to which new status. Each from/to change can be controlled individually. You can allow all groups of staff members to initiate a status change or limit the change authority to one group.

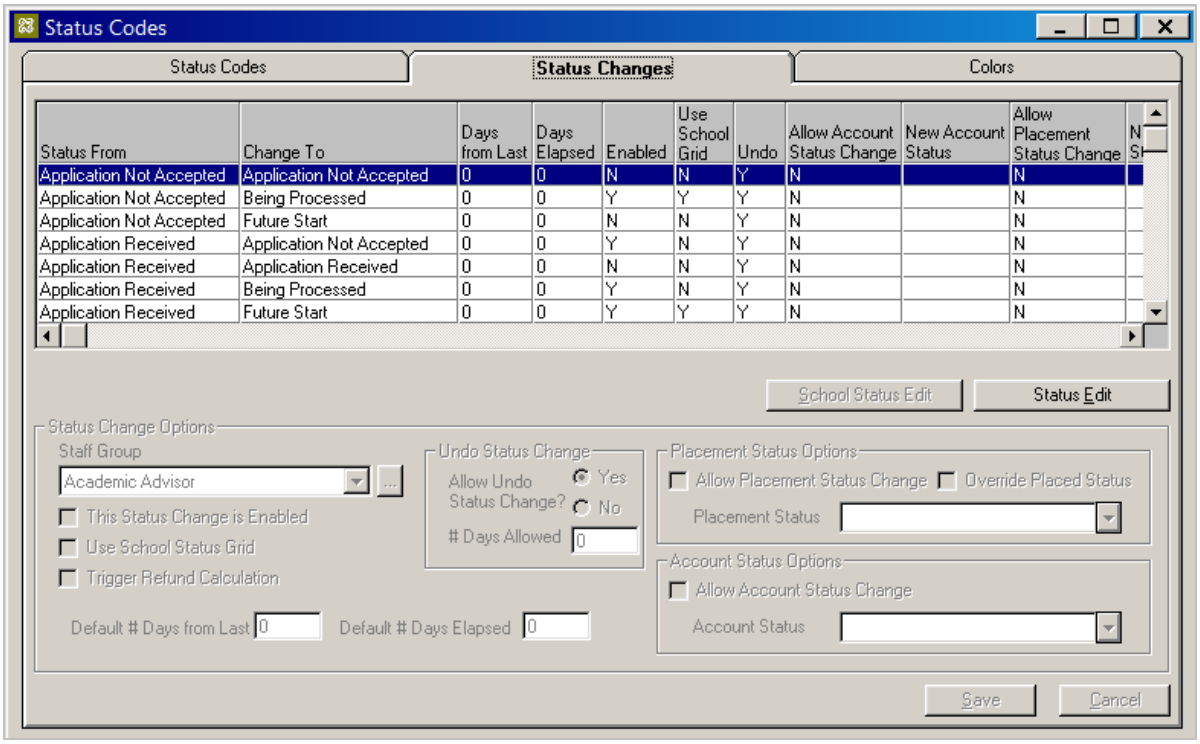
For example, a student whose current status is 'Attending' can be changed to a new status of 'Probation', 'Complete', 'Drop', 'Graduate', and so on. Only one group of staff members can trigger the change, for instance, Academic Records staff members.

Users who have access to modify the setup of status changes can specify a placement status for each school status listed. When a school status change is performed, the student enrollment's placement status is also changed if a placement status has been associated with the school status that the enrollment record was changed to. This enables users to more easily differentiate enrollment records when working in the Career Services module and reduces the risk of associating a student placement record with the incorrect enrollment record.

To edit the status change rules:

1. Navigate to **Setup > Status Codes**. The Status Codes form is displayed.
2. Select the **Status Changes** tab.

   This tab displays System Status codes that can be interchanged. For example, the system status 'NDS: Attending' can be changed to another School Status code having a System Status of ' NDS: Attending', or to any of the other NDS codes (Cancel, Complete, Drop, Incomplete, No Show, or Probation).
3. A default set of allowed NDS status changes is provided in the system conversion procedure. To disable one or more of the allowed changes, select the changes to be disallowed. For each selected status change, clear the check box **This Status Change is Enabled**. You can also select a Staff Group that is authorized to initiate the selected status change.



4. Select the Status Change rule to be edited and click **Status Edit**.
5. Select **This Status Change is Enabled** to enable or disable the status change.
6. Select a **Staff Group** or **Groups** that can initiate this status change. A blank value in the Staff Group text box means that there are no restrictions for that status change.
7. Select **Use School Status Grid** to control this change item with school statuses instead of system statuses. Once this option is selected and saved, you can click **School Status Edit** to continue with school statuses. See below.
8. Select **Trigger Refund Calculation** to trigger a hypothetical refund calculation record to be added to the student. This check box is only enabled if the status in the 'Change To' column is a Permanent Out or Never Attended status (categories P, Z, N, W); these status codes are not included in the status codes that allow the trigger to be set (with the exception of the TOCAMP and TOPROG status codes).
9. *Optional*: Enter a value in **Default # Days from Last.** This is the number of days from the student's last status change in which this status transition is allowed. The date involved is the effective date of the enrollment status change. Once the number of days elapsed from the last status change has exceeded this setting, this status transition is no longer allowed. A zero in this field indicates that this criteria is not used on this transition.
10. *Optional*: Enter a value in **Default # Days Elapsed.** This is the number of days from the student's last status change that have had to elapse before this status transition is allowed. The date involved is the effective date of the enrollment status change. If the number of days elapsed from the last status change is less than this setting, this status transition will not be allowed. A 0 in this field indicates that this criteria is not used on this transition.

    As an example of the usage of the two fields above, let us say the change is from Attending to Drop. The Default #of Days from Last is 5 and the Default # of Days Elapsed is 15. This means that you have a range of 10 days in which to make this change. The change cannot be made for at least 5 days after the student's last enrollment status change. Then you have until 15 days after the student's last enrollment status change to make the change from Attending to Drop.
11. The Undo Status Change feature enables users to reverse a particular status change. Use the radio buttons to select **Yes** or **No**. If you select **No**, the user cannot undo a status change. If you select **Yes**, the **#Days Allowed** field becomes enabled. Enter the school-defined number of days during which a status may be undone. Leaving this field blank or setting it to zero indicates that the undo functionality is available indefinitely. A user might want to undo a status change due to an input error or to change a status from **Drop** to **Cancel** if it is within the allowable time.

    Note: The Undo Status feature enables you to change only the last status in the student's status history. You cannot undo previous statuses.
12. Placement Status Options enable you to decide if you want the student's placement to automatically change to the defined status even if the student is currently in a system status of Placed.
    - Select **Allow Placement Status Change** and then select a **Placement Status** from the drop-down menu to enable the following:
        a. A placement status to automatically change when an enrollment record is changed to the school status.
        b. The student enrollment record's placement status to automatically change to the specified placement status.
    - Select **Override Placed Status** to override the placed status that a student is in.

- Select a new **Placement Status** from the drop-down menu to undo a status change; if that school status change caused a placement status change, the placement status change will also be undone provided it is the most recent placement status change on file for the student enrollment record. If another placement status change has been done subsequent to the placement status that resulted from the school status change, the placement status caused by the school status change will not be undone.

13. **Account Status Options** enable you to select the system status for which account status changes will automatically be enabled. If you select the **Use School Status Grid** option, you can edit account status from that grid or from the fields listed under Account Status Options.

    Automatic student account status changes require that the student enrollment campus be in the campus group mapped to the system status or school status which is also mapped to an account status. Also, the student enrollment school must be a campus location at which the mapped account status is active.

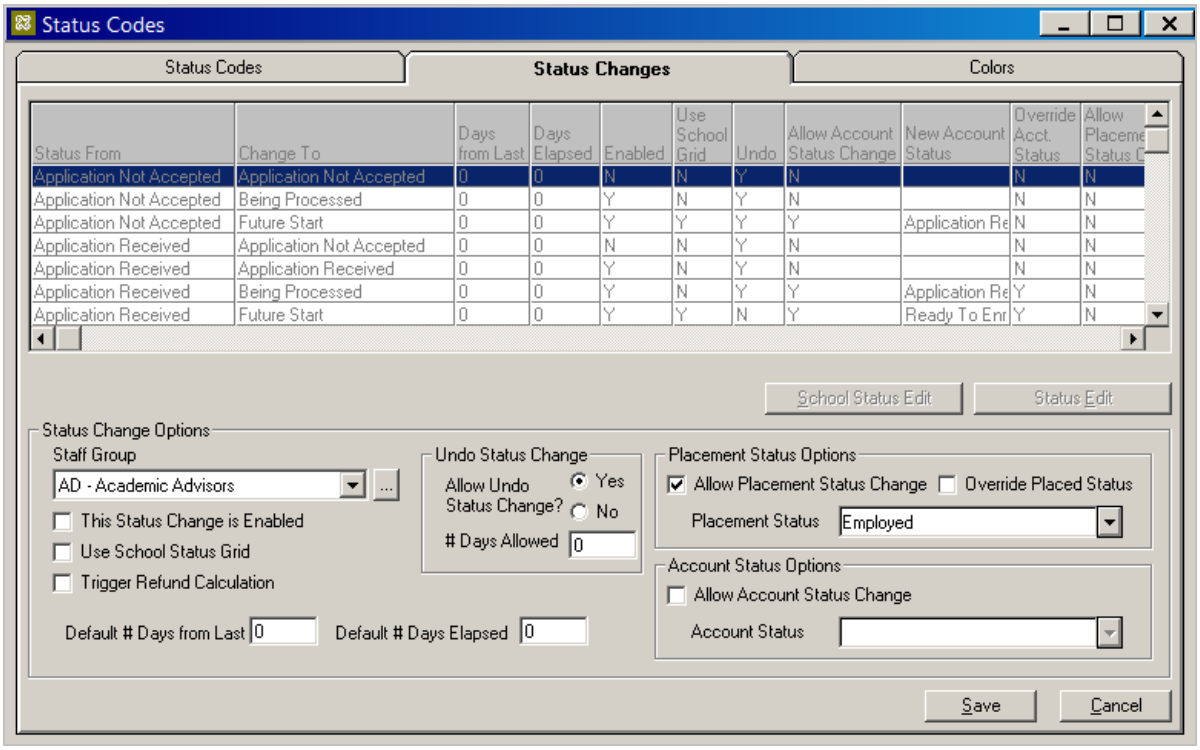
    - Select **Allow Account Status Change** to enable the automatic account status change feature. The **Allow Account Status Change** column displays Y, upon selecting Save, to show account status is modifiable.
    - Select an **Account Status** that will be automatically applied when the student status changes to the selected system status. The **New Account Status** column displays the selected default account status.

    Note: If 'Account Statuses' codes are configured (Lists > Student Accounts > Account Statuses) as 'Account' or 'Both', they are modifiable to be automatically updated. If an account status is configured as 'Collections', it cannot be modified for automatic updating.

14. Click **Save**.
15. Click the **Status Codes** tab and click **Close** to close the Status Codes form.

To change the values of School Status:

1. Select a Status Change row and select **Use School Status Grid** to base the possible changes on your school-defined statuses rather than the system statuses.
2. Click **School Status Edit**. The **School Status Grid** is displayed. On this form, the statuses are based on your school's descriptions.



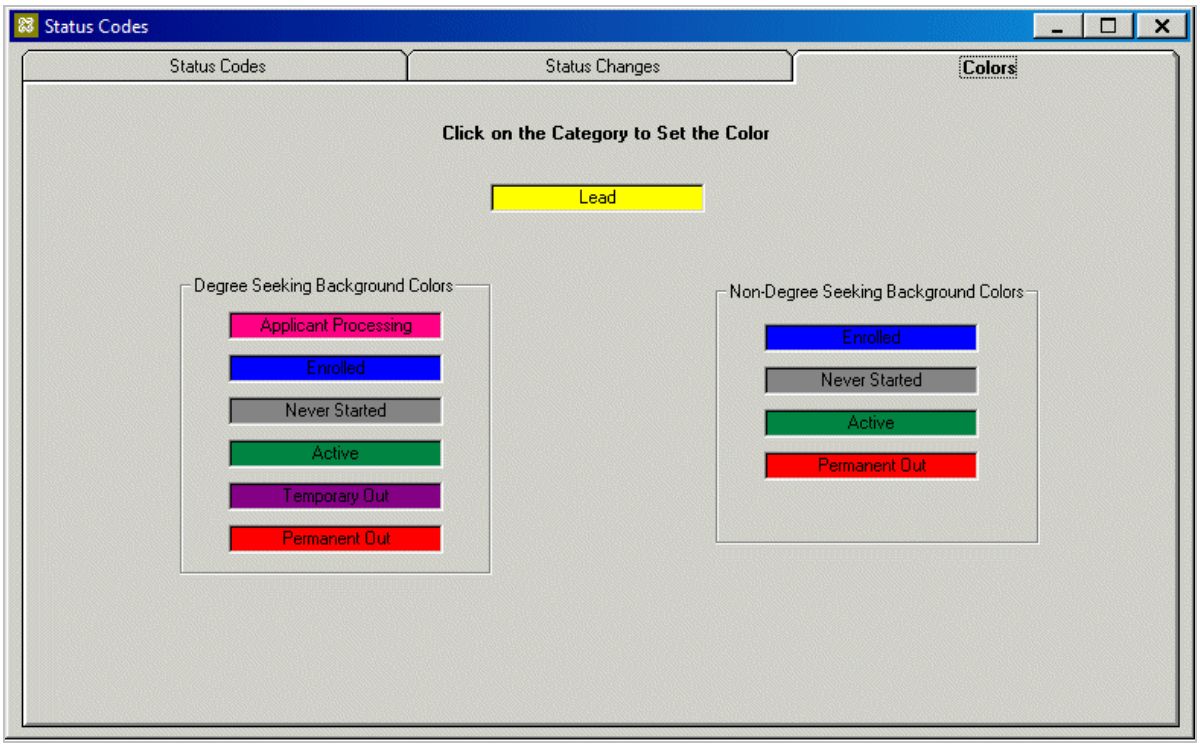
3. Select a row and click **School Status Edit** to change the values.
4. *Optional*: Select a **Staff Group** or **Groups** that can make this status change.
5. *Optional*: Enter a value in **Default # Days from Last**. This is the number of days from the student's last status change in which this status transition is allowed. Once the number of days elapsed from the last status change has exceeded this setting, this status transition is no longer allowed. A zero in this field indicates that this criteria is not used on this transition.
6. *Optional*: Enter a value in **Default # Days Elapsed**. This is the number of days from the student's last status change that have had to elapse before this status transition is allowed. If the number of days elapsed from the last status change is less than this setting, this status transition will not be allowed. A 0 in this field indicates that this criteria is not used on this transition.
7. If it has been previously set, the **Undo Status Change** feature indicates whether a status change can be undone and the number of days after the change that an undo is allowed by your school. If these fields are enabled, you can make changes to the **Undo Status Change** fields in this form.
8. Click **Save**.
9. Click **Close** to close the form. You are returned to the Status Changes form.

Status Codes - Colors Tab

You can change the background color of student forms to emphasize the status category of the current student. See also Status Codes, Status Changes, and Tracking NDS Students.

To edit the student status background colors:

1. Navigate to **Setup > Status Codes**. The Status Codes form is displayed.
2. Select the **Colors** tab.

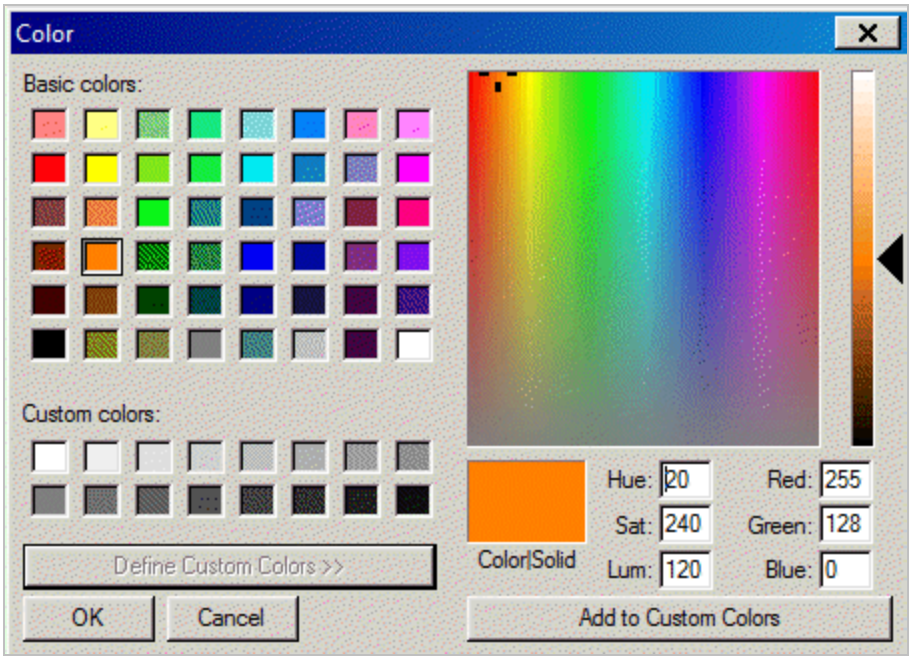


3. You can assign colors for status categories of Degree Seeking and Non-Degree Seeking students. Select a background color by double-clicking on the category box. The color selection form is displayed.

4. Select one of the **Basic colors** and click **OK**. The color appears in the Status Colors form.

   OR

   a. Click **Define Custom Colors** to open the color palette. From the color palette, you can slide the indicators until you find a color suitable for your needs.



   b. Click **Add to Custom Colors** and click **OK**.

      The custom color appears in the Status Colors form.

5. Change any other status category colors in the same manner.

6. Close the Status Codes window by clicking the **X** in the upper right corner of the window.

Tracking Non-Degree-Seeking (NDS) Students

Many institutions offer courses or programs for students who are not seeking a degree. CampusNexus Student has features to help those institutions track non-degree-seeking (NDS) students separately from regular, degree-seeking students. The key to this tracking process is a separate set of codes for the status of the NDS students.

Non-Degree-Seeking (NDS) status codes have been added to the system status table. These codes enable your institution to define an alternate path for status changes for students enrolling into non-degree-granting or single-subject programs. The program versions have also been modified to indicate that the program is a degree or non-degree program. Once a student is enrolled into a non-degree program, the status change logic is determined by the institution's configuration of the NDS status codes. These separate codes facilitate elimination or separation of non-degree students on reports.

NDS Setup

First, determine whether your campus offers courses or programs for non-degree-seeking students. If not, there is nothing you need to do. CampusNexus Student defaults its setup options to consider all students as seeking a degree.

If your campus does offer courses or programs for NDS students, complete the setup steps described below.

Status Category table (SyStatusCategory)

Code	Description
X	NDS-Enrollment
Y	NDS-Active
Z	NDS-Permanent Out
W	NDS-Never Attended

Status table (SyStatus)

Code	Description	Category	System Code	Hierarchy	Active
NDS-ATT	NDS: Attending	Y	1	2	1
NDS-PROB	NDS: Probation	Y	1	4	1
NDS-FUT	NDS: Future Start	X	1	10	1
NDS-BP	NDS: Being Processed	X	1	12	1
NDS-RE	NDS: Re-Entry	X	1	14	1
NDS-COMP	NDS: Complete	Z	1	22	1
NDS-INC	NDS: Incomplete	Z	1	24	1
NDS-DROP	NDS: Drop	Z	1	26	1
NDS-NO	NDS: No Show	W	1	34	1
NDS-CAN	NDS: Cancel	W	1	36	1
NDS-REJ	NDS: Application not Accepted	W	1	32	1

See Status Codes for Non-Degree Seeking Students, Status Changes Setup, Status Colors to configure status codes for non-degree-seeking students.

Configure the following NDS-related options on the Academic Records tab of the Campus Information form:

- Allow Non-Degree Programs
- Default Active Status
- Default NDS Active Status

NDS Programs and Courses

You may want to set up your new NDS courses or programs with codes that indicate that they are NDS-related.

Note: Before setting up a new NDS program, consider adding some NDS-related codes to the lists referred to (required) on the Program Version form: Degree, Program Group, and Grade Scale. "SAP Table" is not a required field for NDS program versions.

The "Program Type" option on the **Program Version form** allows **Degree** or **Non-Degree**. The default for a new program version is **Degree**.

When loading data into the form for editing, if there are any enrollments assigned to the program version, CampusNexus Student will disable the Program Type option buttons. Once students are enrolled in a program version, the Program Type cannot be changed.

Enrollment

If the campus at which the student is enrolling allows for non-degree programs, CampusNexus Student adds a "Program Type" prompt above the Status field in Step 2 of the Enroll Student wizard. Select "Degree" or "Non-Degree". If the campus does not allow NDS enrollments, the program disables the options and selects the "Degree" option.

The Program Version and Status List boxes will be filtered based on the Program Type selection.

For Degree programs:

- The Status list will remain the same. The program will list the institution-defined status codes in category "E - Enrollment".
- The Program Version list will show only Degree program versions.

For Non-Degree programs:

- The Status list will show only the NDS - Enrollment institution-defined status codes. SyStatus.Category = "X".
- The Program Version list will show only Non-Degree program versions.

Status Changes

Individual Status Changes

The prompts on the Status Change form for various dates and other information are based on the type of status change that is taking place. NDS status codes and categories appear as required throughout CampusNexus Student.

Standard status changes and changes to NDS enrollments are similar.

Enrollment Statuses

Non-Degree-Seeking Enrollment Status	Degree-Seeking Enrollment Status
NDS-DROP	DROP
NDS-INC	INC

Non-Degree-Seeking Enrollment Status	Degree-Seeking Enrollment Status
NDS-COMP	COMPLETE
NDS-NO	NOSHOW
NDS-CAN	CANCEL
NDS-REJ	APPREJ
NDS-ATT	ATT
NDS-RE	REENTRY
NDS-BP	BP
NDS-FUT	FUT

Batch Status Changes

The prompts on the Batch Status Change form for various dates and other information are based on the type of status change that is taking place. We modified the logic to include the new NDS status codes and categories when setting the prompts.

Standard status changes and changes to NDS enrollments are similar.

Student Enrollment Information

When the enrollment selected in the list at the top of the Enrollment form belongs to a program that is defined as a non-degree program, the **Transfer** button is not available.

Transfer Enrollment

On the Transfer Enrollment form), transfers will not be allowed to or from an NDS Enrollment. In the list of "Transfer to Enrollments", enrollments in a Non-Degree program (AdProgramVersion.DegreeProgram = 0) are not included.

Report Selection

Any report that displays the Report Selection form and has status selection will include the degree-seeking and the NDS Status codes. When Status Categories are available for selection, the NDS Status Category codes will also be included.

Refund Calculation

The Refund Calculation form includes the NDS Status codes when checking the enrollment status.

Status Codes

Degree-Seeking	NDS
ATT	NDS-ATT
PROB	NDS-PROB
DROP	NDS-DROP
COMPLETE	NDS-COMP
FUT	NDS-FUT

Degree-Seeking	NDS
BP	NDS-BP
NOSHOW	NDS-NO
CANCEL	NDS-CAN
APPREJ	DS-REJ

Setup > Contact Manager

When you navigate to Setup > Contact Manager, the Contact Manager Setup form is displayed. The form contains the following tabs:

- Activity Policies
- Document Policies
- E-mail
- FERPA Groups
- Staff Groups Permissions
- Activity Settings

A Contact Manager Security Policy is applied to a staff member. It gives the staff member privileges defined by you to assign (or not assign) activities to others, to read activities assigned to others, to edit activities assigned to others, and to close activities assigned to others. Here is where you define the mix of staff groups, activity types, and functions.

If you choose not to create such policies, a user can only view, edit, and close activities assigned to him or her, and add new activities only for himself or herself. You can add, edit, delete, assign, select staff members to whom the policies are assigned, or print the policies within the tabs.

Contact Manager Setup - Activity Policies Tab

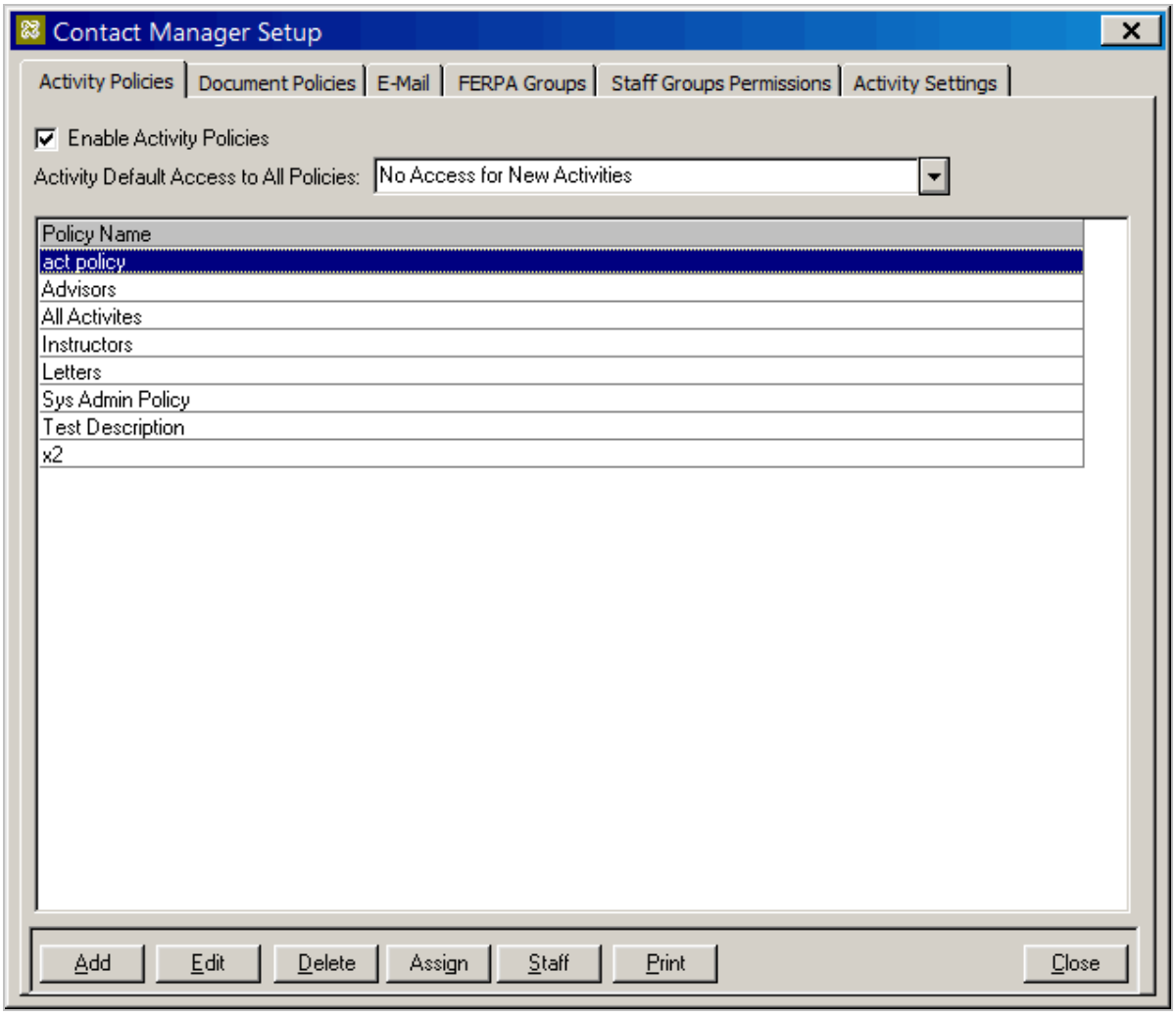
Activity Policies in Contact Manager Setup determine which users can assign, read, edit, and close particular kinds of activities. An Activity Policy is applied to a staff member. It gives the staff member privileges defined by the system administrator to assign (or not assign) activities to others, to read activities assigned to others, to edit activities assigned to others, and to close activities assigned to others.

An Activity Policy is set up by a combination of Activity Types and by staff groups. A policy indicates how each activity type (meeting, letter, phone call, and so on) can be viewed or modified by users to which the policy is assigned. The policy also indicates how users to which the policy is assigned can manipulate the activities of other staff members.

After setting up an Activity Policy, the policy can be applied to staff members by clicking the Staff button on the Contact Manager Setup form or Staff Contact Manager tab.

To add or edit a Contact Manager Activity Policy:

1. Navigate to **Setup > Contact Manager**. The Contact Manager Setup form is displayed with the Activity Policies tab.



2. Select or clear the **Enable Activity Policies** check box. It is not necessary for this option to be enabled to add or

edit a policy. It must be enabled before a policy becomes effective.

3. After you enable or disable this option, you must exit CampusNexus Student and log in again to see the result of the change.
4. Select the **Activity Default Access to All Policies**. The following options are available:
    - Full Access for New Activities

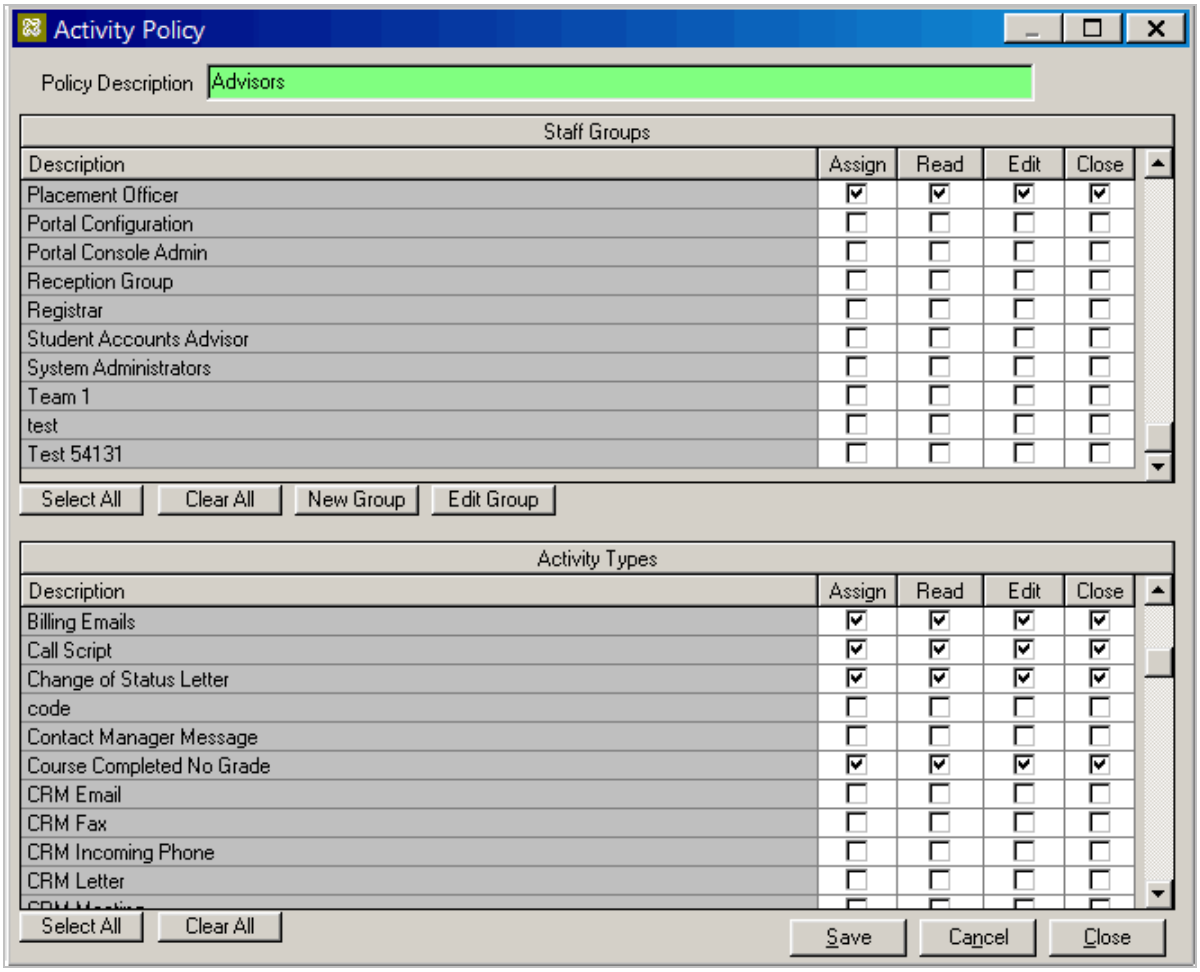
      This option lets the system administrator grant all user's equal activity access.
    - No Access for New Activities

      This option lets the system administrator select the security group to be assigned the new activity. T the system administrator selects the Staff Groups and Activity Types to define the Contact Manager Policy. Specific security group users then have access to the new activity according to their Contact Manager Policy.
    - Use Author's Access for New Activities

      This option lets the system administrator verify the Author's actions. The system administrator navigates to Setup > Contact Manager and selects the Author's policy. The system administrator verifies that no changes have been made to the Staff Group selection and sees the new activity on the Activity Types portion of the policy window.
5. These actions are taken once the Author has added the new activities.

To add or edit an Activity Policy:

1. Click **Add** to add a new Contact Manager Activity Policy, or select an existing policy on the grid and click **Edit** to view or change the details. The Activity Policy form is displayed.



2. Enter or edit the **Policy Description**.
3. Click **New Group** to add a new staff group. You must have access to the Staff Setup form to add or edit staff member groups on this form.
4. Select a group and click **Edit Group** to edit the members of the group.
5. Select one or more Staff Groups. A person to whom this policy is applied can manipulate the activities of the selected group(s). Use the **Select All** or **Clear All** buttons under the Staff Groups Grid to select or clear all the Assign, Read, Edit, and Close options. Double-click a Staff Group row to select all the options or clear all the options on the row. Otherwise, select or clear the options individually.
6. Select the Activity Types and functions that can be used by a person to whom this policy is applied. Use the **Select All** or **Clear All** buttons under the Activity Types Grid to select or clear all the Assign, Read, Edit, and Close options. Double-click a row to select all the options or clear all the options on the row. Otherwise, select or clear the options individually.
7. Click **Save** to save your Contact Manager Activity Policy.

Contact Manager Setup - Document Policies Tab

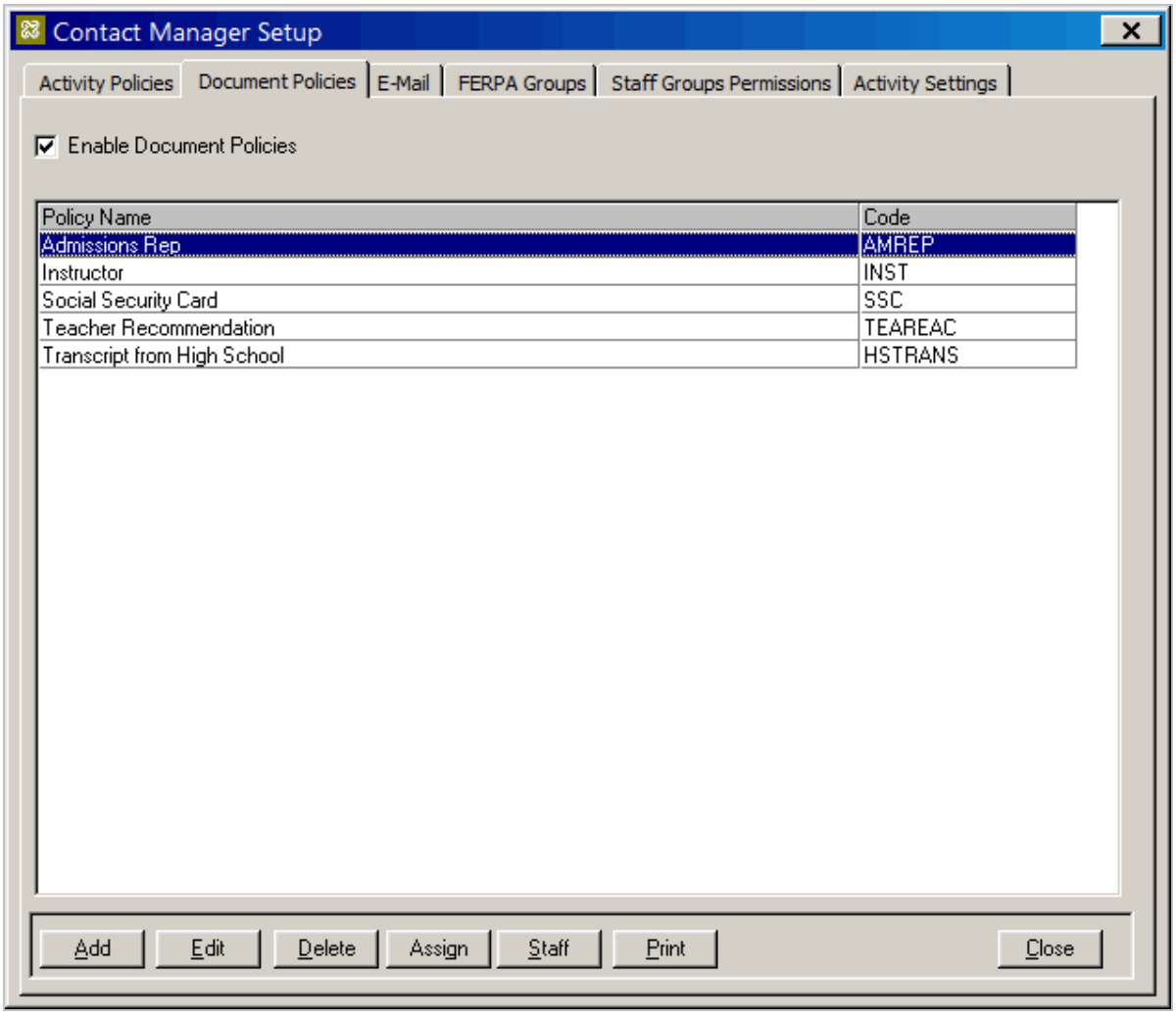
Document Policies in Contact Manager Setup determine which users can assign, read, edit, and close particular kinds of documents. A Document Policy is applied to a staff member, or a staff member can be assigned to a Document Policy. It gives the staff member privileges defined by the system administrator to assign, report, attach, edit, and delete documents.

A Document Policy is set up by a combination of document types and staff members/groups. A policy indicates how each document type (resume, transcript, driver license, FAFSA, etc.) can be viewed or modified by users to which the Document Policy is assigned. The policy also indicates how users to which the policy is assigned can manipulate the activities of other staff members.

After setting up a Contact Manager Document Policy, the policy can be applied to staff members individually, by clicking the Staff button on the Contact Manager Setup form or under Setup > Staff > Contact Manager. The policy can also be applied to staff members as a group or individually by clicking the Assign button on the Contact Manager Setup form.

To set up or edit Document Policies:

1. Navigate to **Setup > Contact Manager**. The Contact Manager Setup form is displayed.
2. Select the **Document Policies** tab.

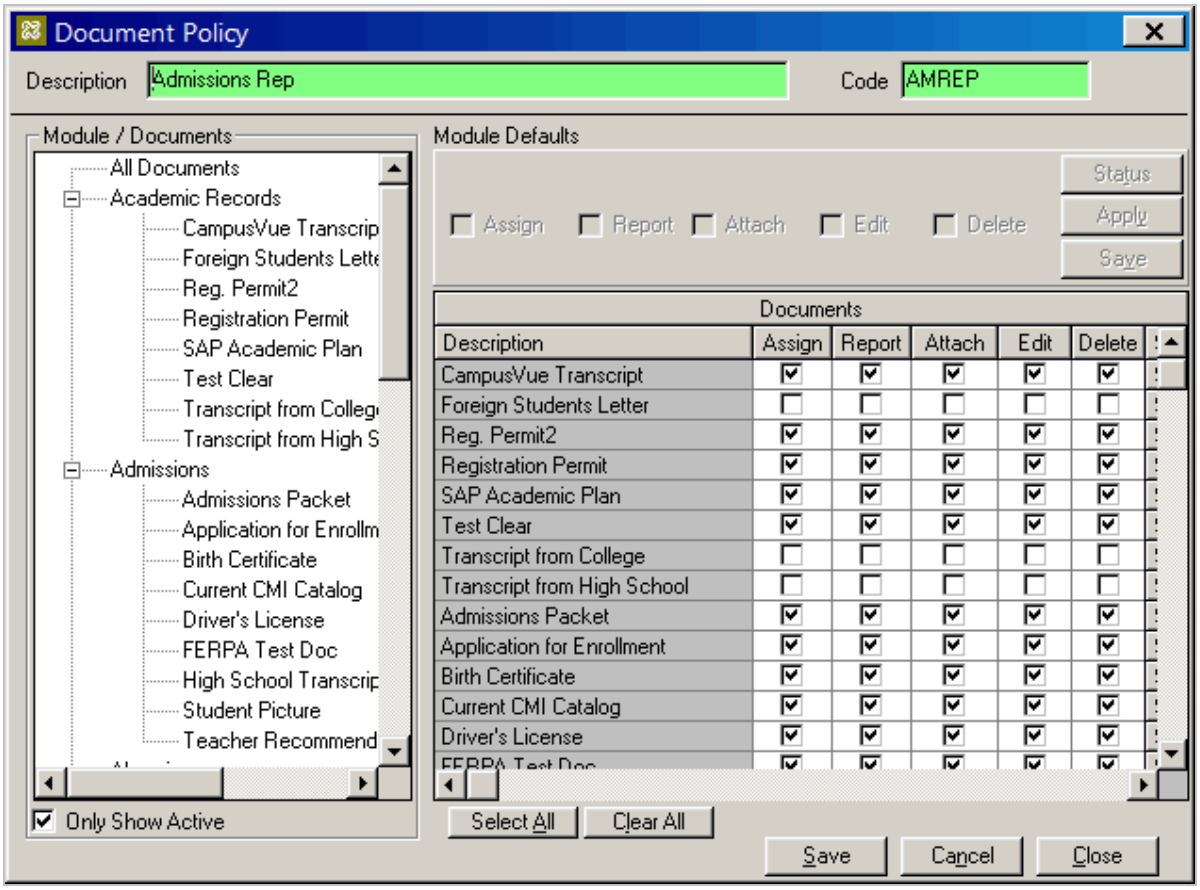


3. To enable or disable Contact Manager policies, select or clear **Enable Document Policies**. It is not necessary for this flag to be selected to add or edit a policy. It must be selected before a policy becomes effective.

You can now add, edit, delete, assign a staff member, or print a Document Policy.

To add or edit a Document Policy:

1. Click **Add** to add a Document Policy, or select a policy and click **Edit** to modify a document policy. The Document Policy form is displayed.



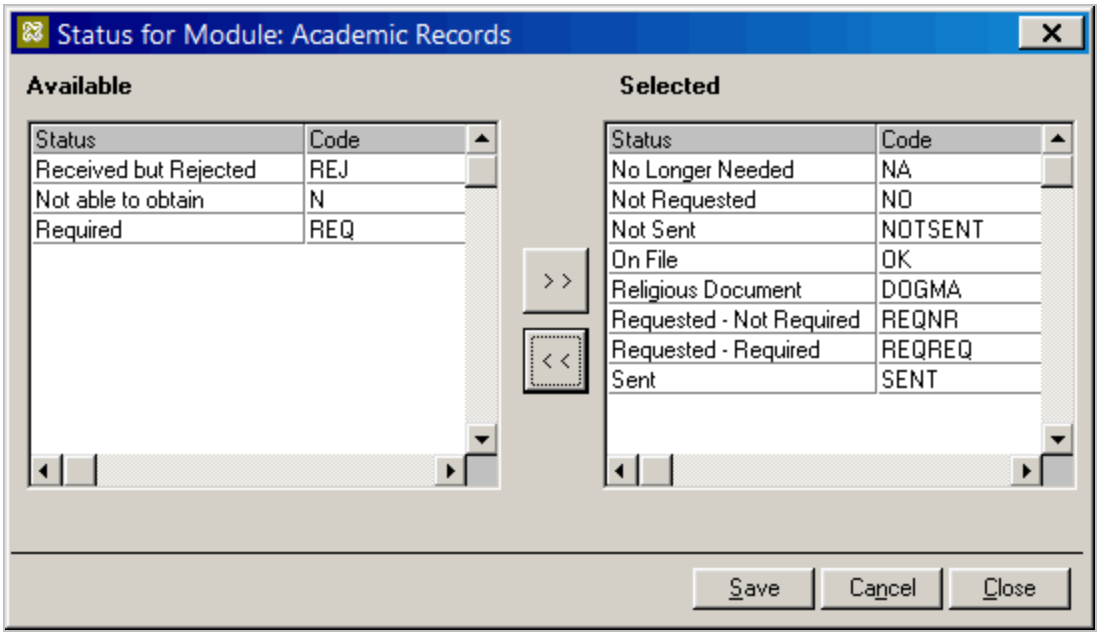
2. Enter a **Description**.
3. Specify a unique **Code**.
4. The **Module/Documents** panel is a directory tree that represents all modules and all documents associated with each module. Click on a module, such as Admissions or Academic Records. The module name is displayed in the **Module Defaults** panel of the screen.
5. Select or clear the **Only Show Active** check box to view only active or both active and inactive documents in the Module/Documents panel.
6. Use the **Module Defaults** panel to set up policies for new documents or all documents within the module. The default values, represented by check boxes are Assign, Report, Attach, Edit, and Delete. If all check boxes are enabled, the staff members (whom you have not yet identified) are permitted to do the following:

- Assign: Add a document to a student's document folder and assign a status to a document. See Document Tracking by Student.
- Report: If this is selected, the Document Tracking Report shows documents based upon the Reporting policy versus the Assign policy.
- Attach: Scan and display documents attached to a student's document folder.
- Edit: Enter information and comments about a document in the Document Detail tab of the Student Document folder and update the statuses and dates for the documents in the Document Tracking form in the Daily menu for the following modules: Admissions, Financial Aid, Academic Records, Student Accounts, Loan Management, and Career Services.
- Delete: Remove from a Student Document folder a document that is no longer needed.

7. Click **Apply** to apply the values selected in the Module Default panel for Assign, Report, Attach, Edit, Delete and "Selected" statuses to all documents in this module . CampusNexus Student prompts you to verify that you want to apply these values to all documents in the module. Click **Yes** to save your changes.

   Note: To save the new default values for future documents to be created from the Documents tab, click **Save** on the Module Defaults panel. **DO NOT** click **Apply**.

8. After you have set and saved the default values for the selected module, the values can be set individually for each document. Click **Save** on the bottom of the form to save changes for individual documents in all modules. CampusNexus Student prompts you to verify that you want to apply these values to all documents in the module. Click **Yes** to save your changes.
9. Click **Save** to update the document policy based upon the changes you have made to the default values. A confirmation message is displayed. Click **OK**.
10. Click **Status** to get a list of statuses to select from all available statuses. The Status for Module form is displayed. Use the arrow buttons to choose Selected statuses. These statuses are displayed in a drop-down list when you click on the status field next to a document name.



11. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

12. The Documents panel of the **Document Policy** form contains a list of all documents associated with the module named. Use this panel to configure policies for each individual document. Click **Select All** to enable all check boxes or **Clear All** to disable all check boxes.
13. Click the **Save** button at the very bottom of the Documents panel to save changes you have made in that panel only. A confirmation message is displayed. Click **OK**.

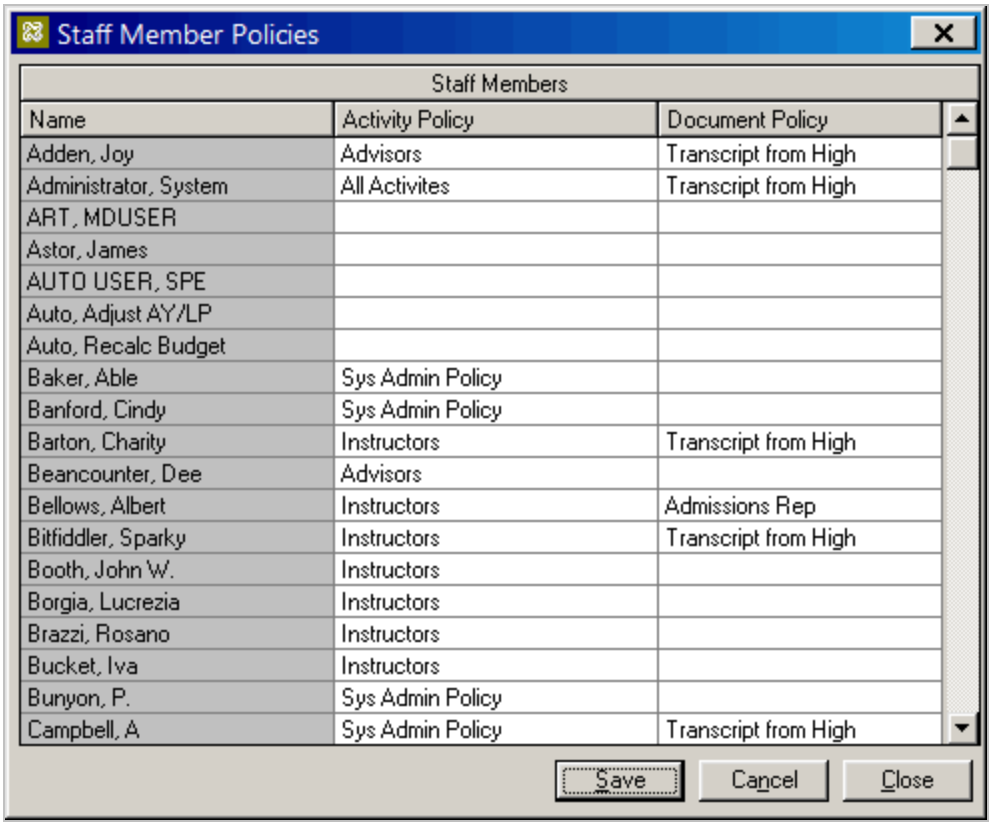
To delete a Document Policy:

Select a document policy and click **Delete**.

To assign a Document Policy to staff members or staff groups:

After a policy is created, it must be assigned to staff members, as individuals or groups.

1. Navigate to **Setup > Contact Manager**. The Contact Manager Setup form is displayed.
2. Select the **Document Policies** tab.
3. Click the **Staff** button. The Staff Member Policies form is displayed. In this form, staff members can be assigned to policies and groups individually.



4. To assign or re-assign a staff member to and Activity Policy or a Document Policy, click inside a cell of the appropriate column. An arrow indicating a drop-down list is displayed. Click the arrow and select an option.
5. Click **Save**.

To print a Document Policy:

Click **Print** in the Contact Manager Setup form. CampusNexus Student generates the Document Policy Report.

Document Policy Report

lst_CmDocumentPolicy.rpt
ADMINISTRATOR

2/13/2007
1:12:53PM

Policy: **Admissions Rep** **Code:** **AMREP**
Module: **Academic Records**

Assign: Y Attach/Display: Y Edit: Y Delete: Y

Status

Requested - Not Required	On File	No Longer Needed
Requested - Required	Not Requested	Sent
Not Sent	Religious Document	

Document: **Foreign Students Letter**

Assign: Y Attach/Display: Y Edit: Y Delete: Y

Status

Requested - Not Required	On File	No Longer Needed
Requested - Required	Not Requested	Sent
Not Sent	Religious Document	

Document: **Test Clear**

Assign: Y Attach/Display: Y Edit: Y Delete: Y

Status

Requested - Not Required	On File	No Longer Needed
Requested - Required	Not Requested	Sent
Not Sent	Religious Document	

Document: **Transcript from College**

Assign: Y Attach/Display: Y Edit: Y Delete: Y

Status

Requested - Not Required	On File	No Longer Needed
Requested - Required	Not Requested	Sent
Not Sent	Religious Document	

Document: **Transcript from High School**

Assign: Y Attach/Display: Y Edit: Y Delete: Y

Status

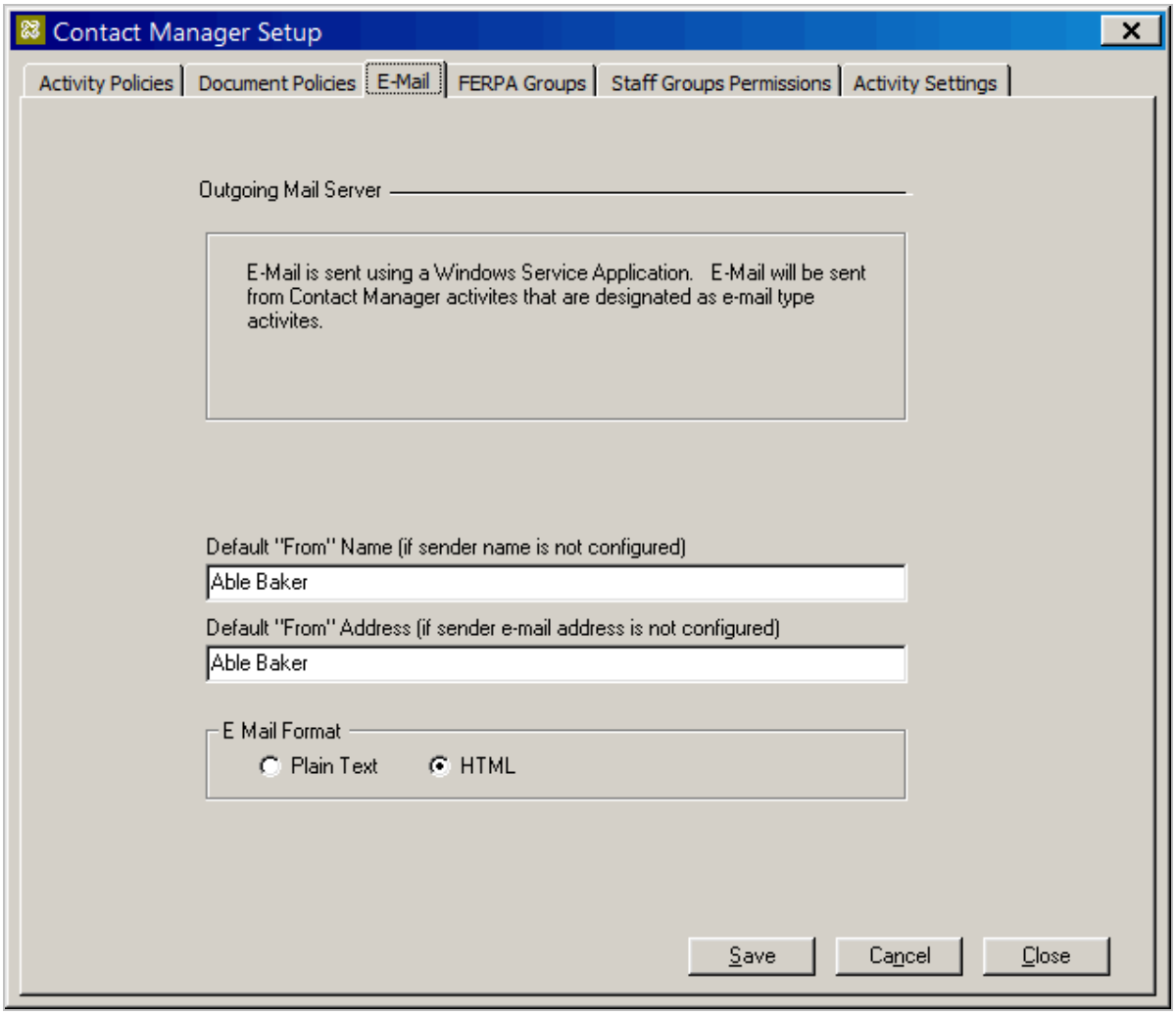
Requested - Not Required	On File	No Longer Needed
Requested - Required	Not Requested	Sent

Contact Manager Setup - E-Mail Tab

Use the E-Mail tab on the Contact Manager Setup form to specify parameters for e-mail messages. After setting up these parameters, you can set up student or staff e-mail activities in Lists > Contact Manager > Activities and set up automatically scheduled activities to trigger e-mail messages.

To set up e-mail:

1. Navigate to **Setup** > **Contact Manager**. The Contact Manager Setup form is displayed.
2. Select the **E-mail** tab. The Outgoing Mail Server field describes how e-mail is sent. The mail server is configurable from the Windows service configuration files to users having the appropriate levels of permission.



3. In the **Default "From" Name** field, specify the name that is displayed in the From field of e-mails received.
4. In the **Default "From" Address** field, specify the e-mail address that is associated with the Default "From" Name.
5. Select an **E-Mail Format**. If you choose to use HTML, you can insert HTML formatting codes. You can even use an external HTML editor to create a message that can be cut and pasted into your student e-mail message.
6. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Contact Manager Setup - FERPA Groups Tab

The Family Educational Rights and Privacy Act (FERPA) is a federal law that protects the privacy of student education records. The law applies to all institutions that receive funds under an applicable program of the U.S. Department of Education. FERPA gives eligible students certain rights with respect to their education records.

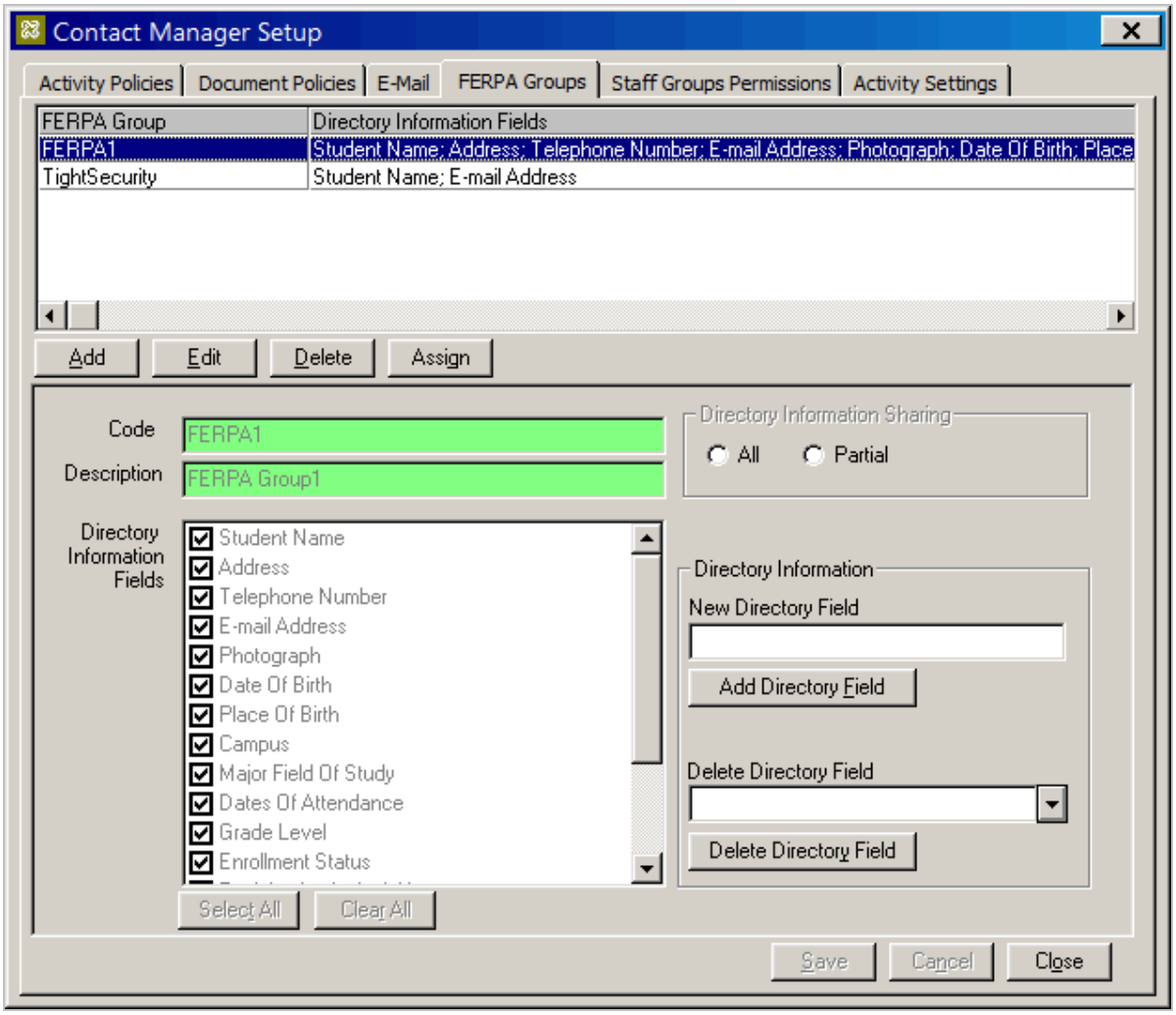
For instance, institutions are required to notify students annually of specific directory information – such as student name, address, telephone number, email address, etc. – that can be disclosed to individuals outside of institution employees or designees. Institutions must give students a reasonable amount of time to opt out of this disclosure. Unless students opt out, institutions may disclose this directory information without the students' consent; if students opt out of disclosure, the institution must obtain consent from the students before releasing the information.

CampusNexus Student enables you to perform the following tasks:

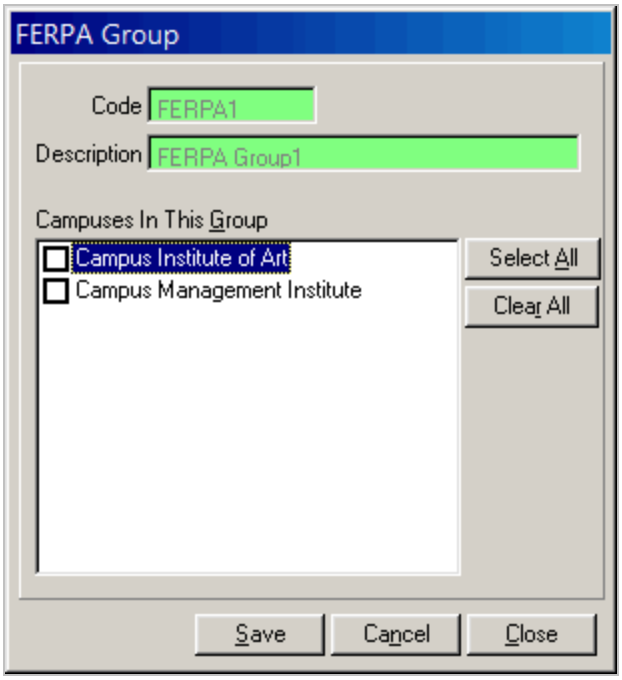
- Create FERPA directory information groups and assign them to campuses. See Campus Allow.
- Notify students when their FERPA information is changed.
- Configure release permissions and designations for student FERPA directory information and academic Information.
- Generate the FERPA Opt-out report.
- Allow students to view the FERPA directory information and academic Information.

To create a FERPA directory group:

1. Navigate to **Setup > Contact Manager > FERPA Groups** (tab).



2. Specify a unique **Code**.
3. Enter a **Description**.
4. Select the **Directory Information** fields to configure the release permissions and designations for your institution.
5. Click **Save**. Your fields selections are saved as a group that can be assigned to individual campuses.
6. Click **Assign**. The FERPA Group form is displayed.



7. Select the **Campuses** that you want to associate with your FERPA Group.

   When your FERPA group is assigned to campuses, site administrators can configure by campus whether CampusNexus Student prompts the user with the student document form after changing FERPA information. For this to occur, you must select **Yes** in the FERPA Document? field on the System Settings > General tab. If you select Yes, all changes to FERPA designations for students, both directory and academic, cause a document form to be displayed.

8. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Note: When you edit a campus, all changes are audited. Audit verifications are handled at the database level only and are performed through appropriate SQL queries.

Contact Manager Setup - Staff Group Permissions Tab

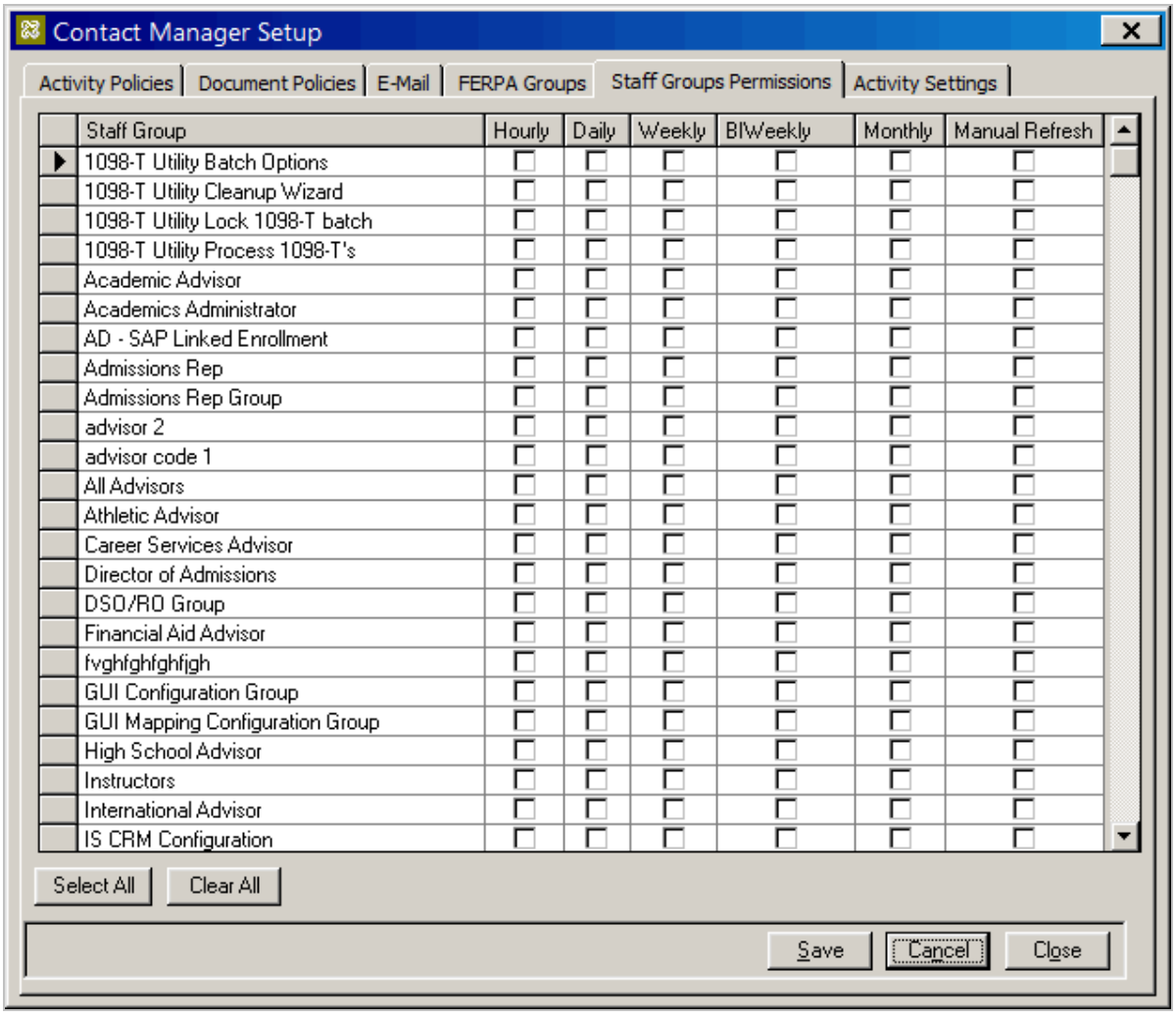
A Contact Manager security policy is assigned (applied) to a staff member. It gives the staff member privileges to assign (or not assign) activities to others, to read activities assigned to others, to edit activities assigned to others, and to close activities assigned to others. The "other" staff members referred to here are members of staff groups.

A staff member can always add, edit, and close activities assigned to him/herself. (Assuming the staff member is granted access to Contact Manager by the security feature of CampusNexus Student.)

There are two avenues to assign Contact Manager security policies to individual members of the school staff. One is via the Contact Manager Tab on the Staff Member Setup form. The other is via the Contact Manager Setup form which is described here.

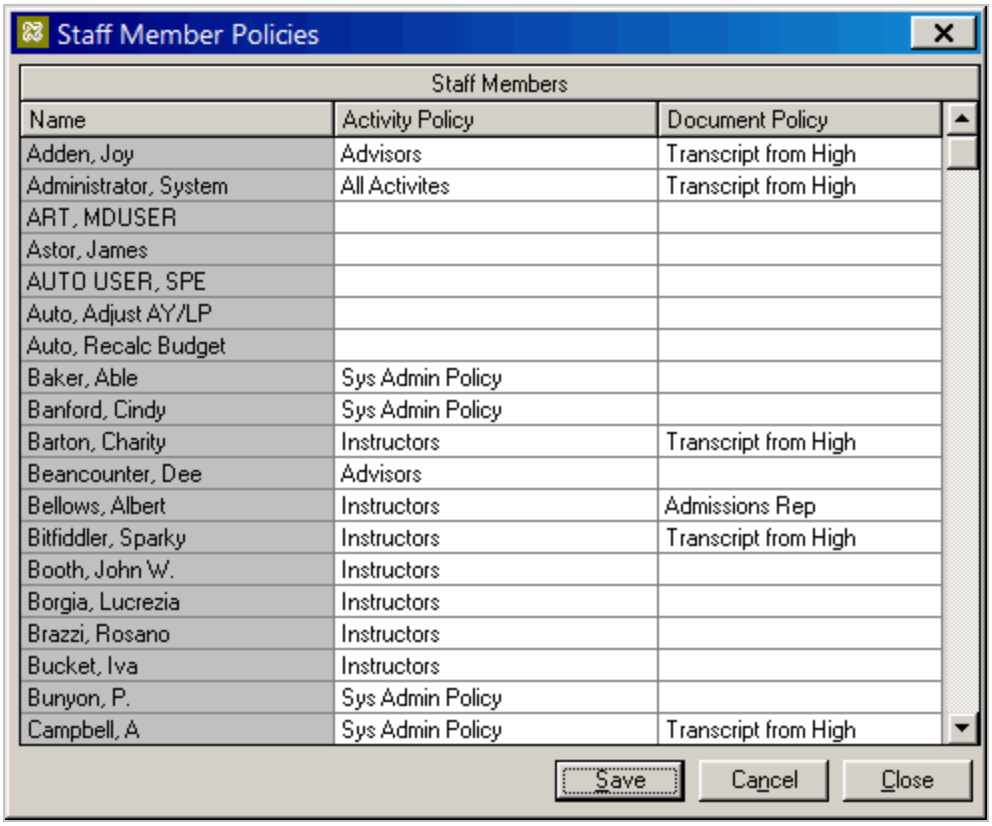
To assign a Contact Manager Security policy to a staff member:

1. Navigate to **Setup** > **Contact Manager**.The Contact Manager Setup form is displayed.
2. Select the **Staff Groups Permissions** tab.



3. See Allow Dynamic Group settings.
4. Click the **Staff** button on the Activity Policies tab or Document Policies tab. The Staff Member Policies form is

displayed.



5. Select the **Staff Member** to whom you want to assign a Contact Manager security policy.
6. To assign or re-assign a staff member to and Activity Policy or a Document Policy, click inside a cell of the appropriate column. An arrow indicating a drop-down list is displayed. Click the arrow and select an option.
7. Select other staff members and policies as required.
8. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

After you select the policies to be assigned to staff members, the staff members must log out of CampusNexus Student and log in again to see the effect of the policy assignments.

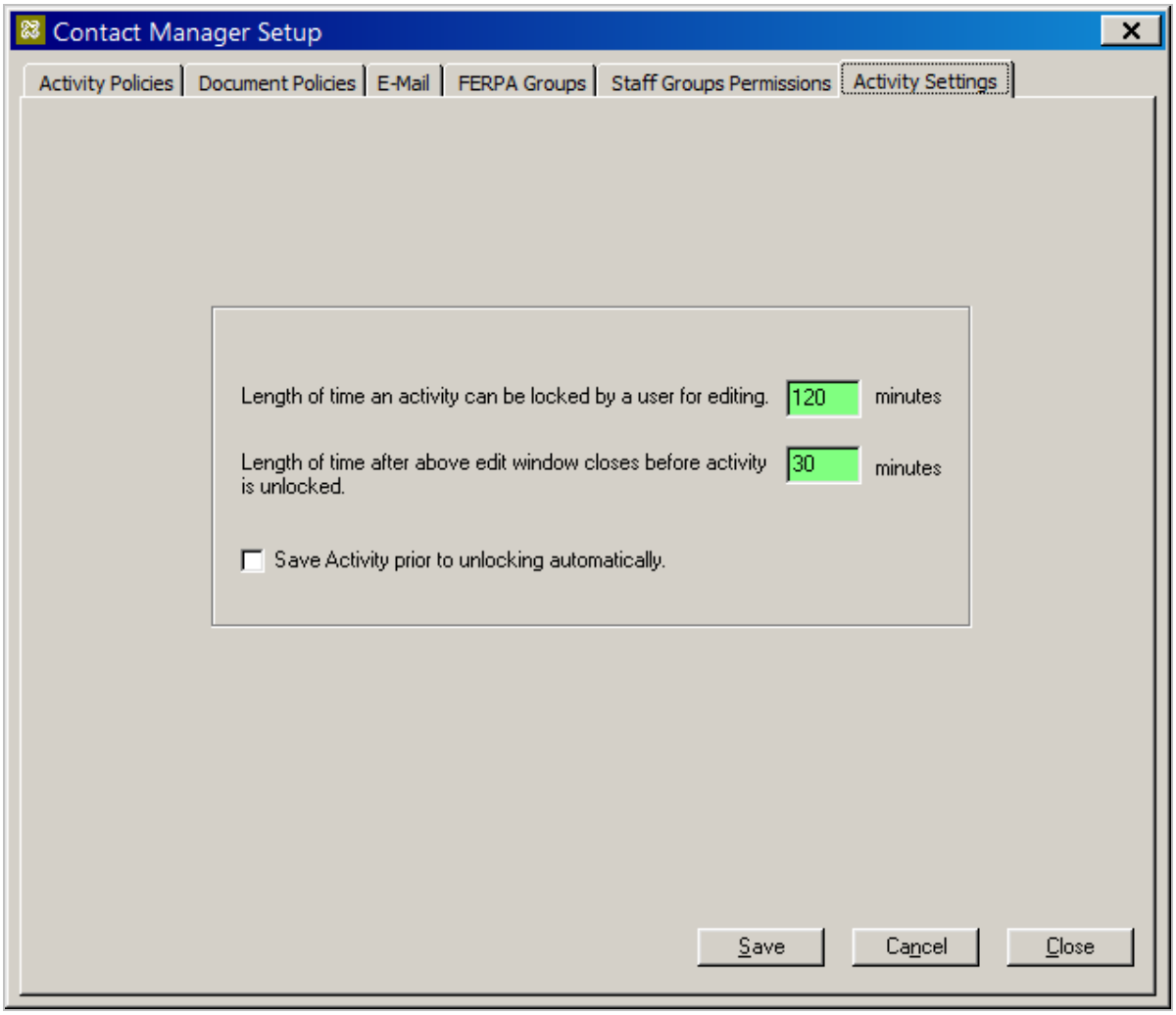
Contact Manager Setup - Activity Settings Tab

Activity Settings in Contact Manager Setup determine how CampusNexus Student handles users who have opened an activity for editing but have not completed editing for a lengthy period of time. Since activity records that are being edited are locked and unavailable to other users, it is necessary to unlock records after they have been open for a while.

The settings on this form determine how long an activity may be open (locked) before a warning message is displayed, before the activity is closed (unlocked) by the system, and whether any edits the staff member had performed are saved when the activity is closed by the system.

To change the Contact Manager Activity Settings:

1. Navigate to **Setup > Contact Manager**. The Contact Manager Setup form is displayed.
2. Select the **Activity Settings** tab.



3. The **Length of time an activity can be locked by a user for editing** determines the length of time an activity may be locked before a message is displayed warning that the activity has been open for a lengthy period of time. This message has a 'Continue' button that the staff member editing the message may click to indicate that he or she is

still working with the activity. If the 'Continue' button is clicked, the activity may continue to be edited for another time period equal to the defined setting. The default setting is 120 minutes.

4. The **Length of time after the above edit window closes before activity is unlocked** setting determines the length of time between the warning message being displayed and CampusNexus Student terminating the activity. When CampusNexus Student ends the activity, the record is unlocked. The default setting is 30 minutes.
5. If **Save Activity prior to unlocking automatically** is selected, CampusNexus Student saves the contents of the form on the staff member's computer before closing the record.
6. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup > Admissions

When you navigate to Setup > Admissions, the Admissions Settings form is displayed. The form contains the following tabs:

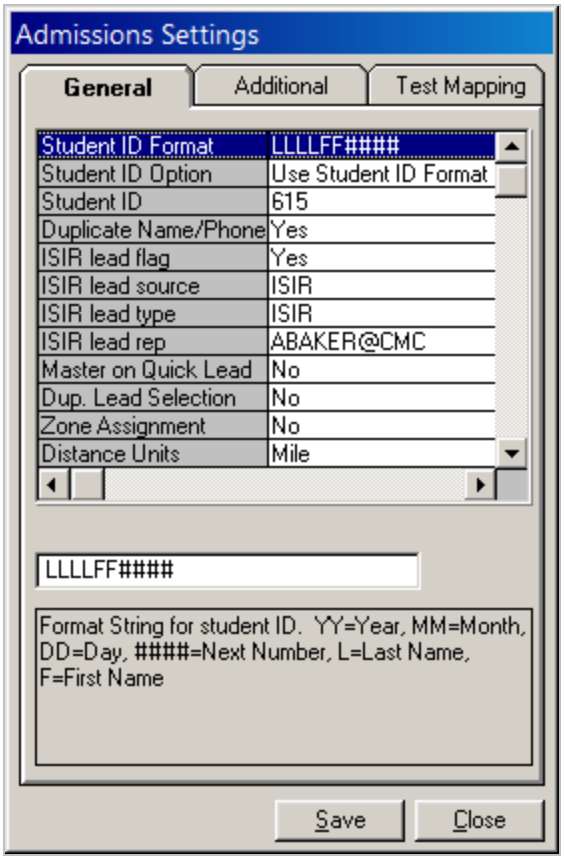
- General
- Additional
- Test Mapping

Admissions - General Tab

Use the General tab of the Admissions Settings form to specify various settings related to admissions, e.g., the formatting of your student identification number, options related to imported ISIRs, options related to imported Entrance Tests, and so on.

To configure general admissions settings:

1. Navigate to **Setup > Admissions**. The Admissions Settings form is displayed.



2. Select the **General** tab and complete the fields as appropriate. See Field Descriptions.
3. Click **Save**.
4. Click **Close** to close the form.

Field Descriptions

Field	Description
Student ID Format	Set up a format for your institution's Student ID. The ID is displayed on the Student Master form and in the Recent Students list at the top of the main window. • If you select 'Use Student ID Format' in the Student ID Option field, compose your format in the text box below the option window. *Examples*: ◦ LL = first two letters of the student's last name ◦ F = first letter of the student's first name ◦ YY = last two digits of the lead entry year ◦ MM = month of the lead entry ◦ DD = day of lead entry ◦ #### = last four digits of the system-generated sequential number • If you choose the 'Sequential Number' option, enter a value to be incremented for the next sequential number to be assigned to a student.
Student ID Option	Choose one of the following options for your institution's Student ID: • **Sequential Number**. CampusNexus Student maintains a sequential number which is assigned to each new lead when it is entered. This number is never duplicated and can be used as a unique ID for a student. • **Use Student ID Format**. Select a combination of characters from the student's name, the date that the lead was created, and the sequential number to form a student ID. For example, a format of YYMM###### includes the year and month that the lead was created and six digits of the sequential number. • **Do Not Generate**. This option implies that the institution keeps track of student IDs manually (IDs are entered on the Student Master form for new leads. CampusNexus Student does not allow a duplicate ID to be assigned to a student. (CampusNexus Student maintains an internal identifier for each new lead to insure that lead records are unique. Users rarely, if ever, see the internal lead/student identifier.)
Student ID	This field displays the next available Student ID.
Duplicate Name or Phone	If you select **Yes**, CampusNexus Student checks for duplicate entry of leads immediately after you enter a lead name and telephone number. If you select **No**, CampusNexus Student waits until you save the lead entry form to check for duplicates.
ISIR Lead Flag	If you select **Yes**, CampusNexus Student creates a new lead/student master record for any ISIR imported by CampusNexus Student that does not match an existing student record. The lead's Social Security Number (SSN) is used as the matching criteria. If you select **No**, data from unmatched ISIRs is ignored and the other three ISIR-related options below have no affect on the system.

Field	Description
ISIR Lead Source	Select a lead source to be assigned to leads entered from imported ISIRs. (Set up a special lead category and lead source for this purpose.) If the ISIR Lead Flag is set to Yes, this lead source is entered in the new Student Master record. If the ISIR Lead Flag is set to No, this option has no affect on the system.
ISIR Lead Type	Select a lead type to be assigned to leads entered from imported ISIRs. (Set up a special lead type for this purpose.) If the ISIR Lead Flag is set to Yes, this lead type is entered in the new Student Master record. If the ISIR Lead Flag is set to No, this option has no affect on the system.
ISIR Lead Rep	Select an admissions rep to be assigned to leads entered from imported ISIRs. If the ISIR Lead Flag is set to Yes, this admissions rep is entered in the new Student Master record. If the ISIR Lead Flag is set to No, this option has no affect on the system.
Master on Quick Lead	This is option controls whether the Student Master is displayed after saving a new quick lead. If you select **Yes**, the check box to open the Student Master after clicking Save on the quick lead form is selected. If you select **No**, the check box is not selected.
Dup. Lead Selection	This option controls whether admissions staff can select a duplicate lead/student record from other campuses while entering a lead. If you select **No**, the rep can select duplicates only from campuses to which the rep has access. If you select **Yes**, the rep can select duplicates from any campus in the database.
Zone Assignment	This option controls whether the combo box to assign zones based on the student's address ZIP code or campus ZIP code is displayed on the Inquiry or Applicant forms and on the user's customizable toolbar.
Distance Units	Select the base unit used in calculating distances: **Mile** or **Kilometer**.
Web Account Mode	This option defines how web accounts are managed in Online Applicants Dups. Select **New Account**, **Old Account**, or **Multiple Accounts**.
Create Lead from Test	If this option is set to **Yes**, the Import Test Scores process creates new leads for unmatched records. If this setting is **No** (default), the unmatched records will be left unmatched.
Test Lead Campus	Which campus would you like your new lead test records to be created into? If a student test record does not have a school code defined, this setting uses the campus code defined here as the default campus to create a new lead record.
Test Lead Source	This option defines the Lead Source for all new leads being created from the test import. The default is **.UNK**.
Test Lead Type	This option defines the Lead Type for all new leads being created from the test import.
Test Lead Rep	This option defines the Lead Rep for all new leads being created from the test import. Test Lead Rep should belong to the campus configured under Test Lead Campus. **Note**: Default configurations are blank for all newly added configuration settings for the following settings: Test Lead Campus, Test Lead Type, and Test Lead Rep.

Admissions - Additional Tab - Quick Lead Form Design

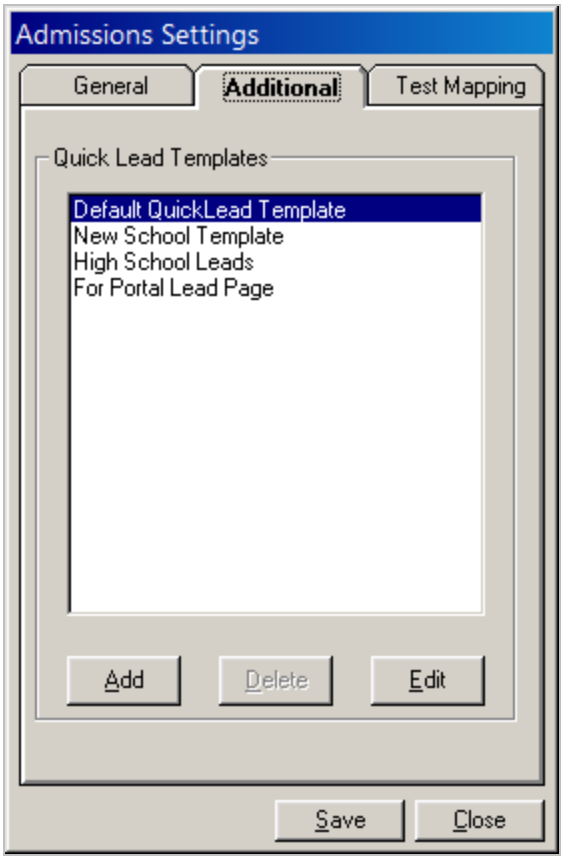
Use the Additional tab of the Admissions Settings form to select a template for the design of your Quick Lead form. Use this feature to design forms that gather the information necessary to quickly enter new leads in CampusNexus Student.

The system administrator can select which fields are to be accepted on the Quick Lead form. Institutions can select the fields from the Student Master and Admissions School-Defined fields lists. The order in which the fields appear on the right selection box is the order that they will be presented on the Quick Lead form. The Quick Lead form can be modified at any time. The changes take effect the next time that the Quick Lead form is opened.

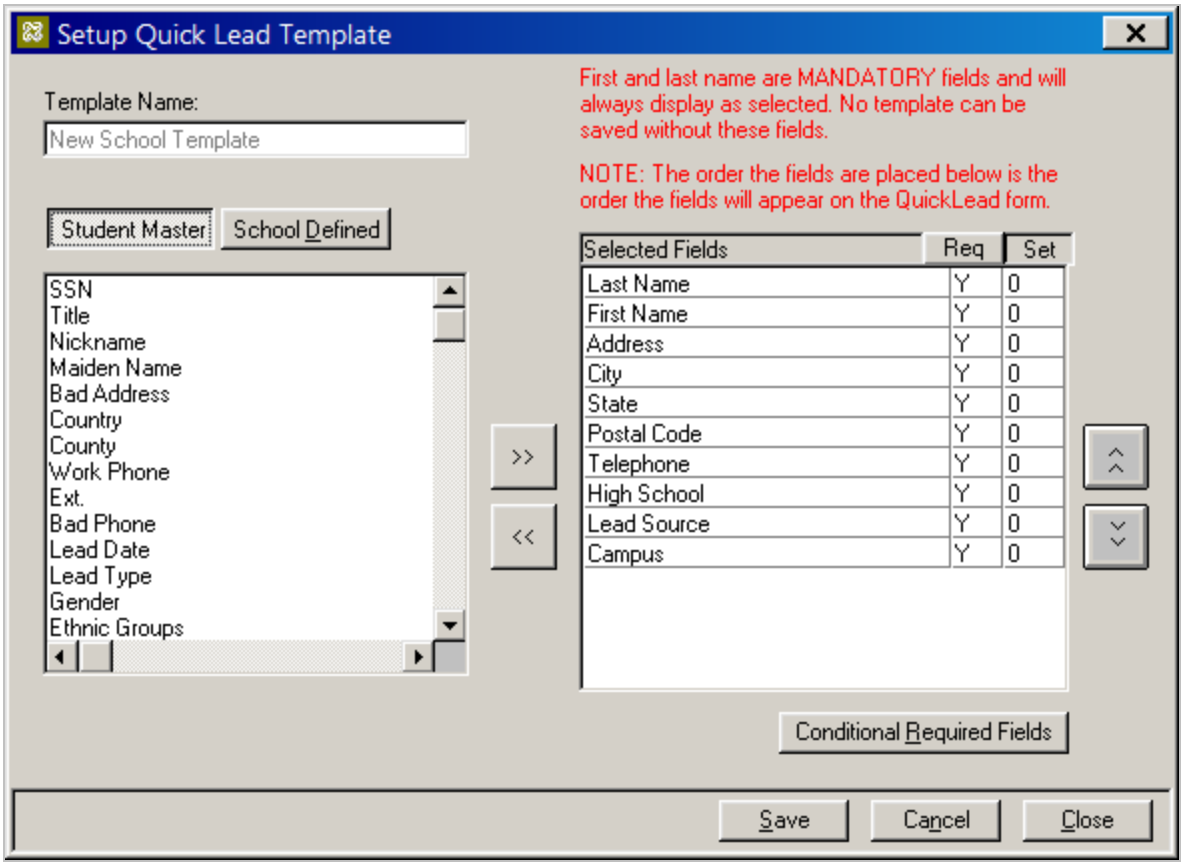
The form load procedure determines whether your institution is accepting international students when loading available fields from the student master record. If so, CampusNexus Student also loads the appropriate SEVIS data fields.

To configure additional admissions settings:

1. Navigate to **Setup** > **Admissions**. The Admissions Settings form is displayed.
2. Select the **Additional** tab. This tab displays a list of Quick Lead Templates. The Admissions department can select from these lead entry forms when entering different types of new leads.



3. Click **Add** to add a new form design to the list, or select an existing form design and click **Edit** to view or change the details. The Setup Quick Lead Template form is displayed.



4. The panel on the left displays a list of fields that can be added to your quick lead form. Click **Student Master** or **School-Defined** above the left panel to change the list of student data fields from Student mater to School-Define or vice versa.

5. Select fields to appear on the quick lead form by clicking on a field name and then clicking >> in the middle of the dialog box. The selected field name is moved to the right-hand panel.

   Deselect a field by clicking the field name in the right-hand panel and then clicking << in the middle of the dialog box. The selected field name is moved to the left-hand panel.

6. Order the selected fields in the right-hand panel by selecting a field and clicking the up or down buttons to the right of the panel. The order of the fields on the list is the order in which they are displayed on the quick lead form.

   Notes:

   - If you place the Postal Code field above the City and State fields, CampusNexus Student searches the table and inserts the correct city and state when a user enters a postal code (U.S. postal codes only).
   - The layout of the Request Information page in Portal follows the layout of the Quick Lead form in CampusNexus Student. Portal allows the values of the labels for the City, State, ZIP Code, and Social Insurance Number to be customized to based on the value in the Country field. The label values may be formatted for US-English or Canadian English. For example, the label 'State' changes to 'Province' when Canada is selected. We strongly recommend that the Country field be moved to the top of the template so

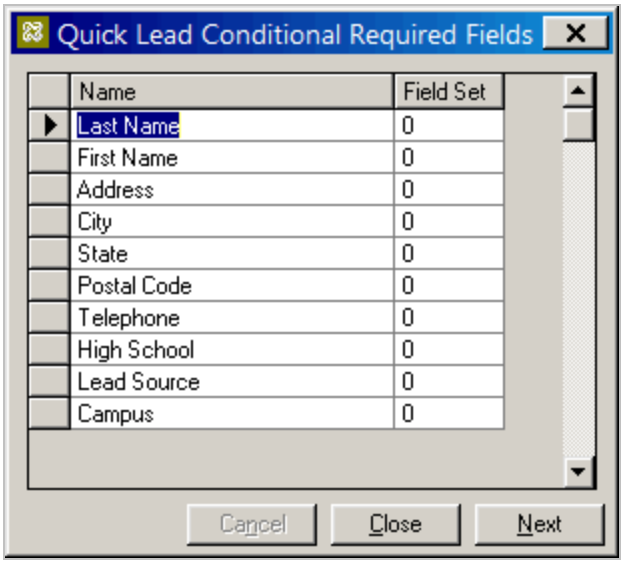
that the visual presentation of Canadian culture is consistent through all areas of Portal. When Canada is entered by a student using the Portal Request Information page, the remainder of the labels on the page are reformatted with Canadian nomenclature. Other country cultures will be implemented in future releases. Currently, they will use a default of US.

7. Select N or Y in the **Req** (required) column to indicate whether the data entry person is required to type information in the designated field.

   Note: Fields that are required on the quick lead form are not necessarily the same as those that are required on the Student Master form. Fields may also be required if they are so designated in the Data Dictionary.

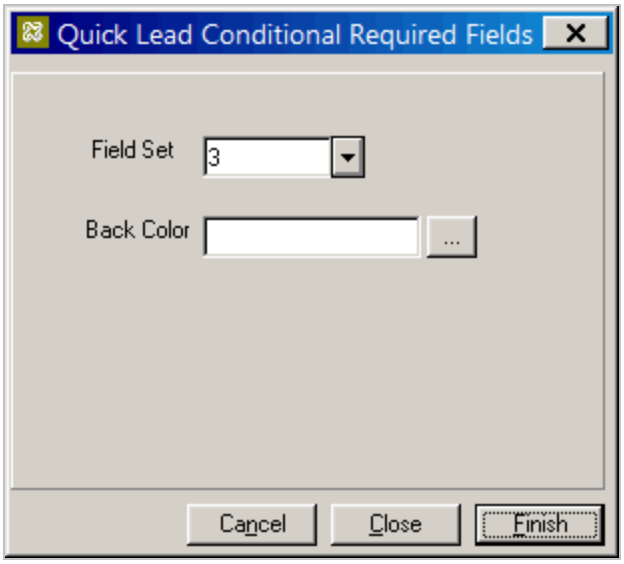
8. The **Set** column is related to the Conditional Required Fields button. It shows the fields (if any) that belong to one or more sets of conditional fields.

   Click **Conditional Required Fields** to designate sets of fields in which one data entry is sufficient for each set. CampusNexus Student displays a form similar to this one. This form displays a grid of all the fields where the **required column is set to yes**.



9. Specify **Field Set** numbers (0 - 99) to indicate which fields are part of each set. Zero in the Field Set column indicates that the field is not part of a set. Multiple sets can be defined.

   Click **Next**. Each Field Set number defined is listed on the second page.



10. For each number, click ... to select the back-ground color for the fields in the set. This background color helps to identify which fields are part of the set.

    After selecting a background color for the set, click **OK** to close the color selection form.

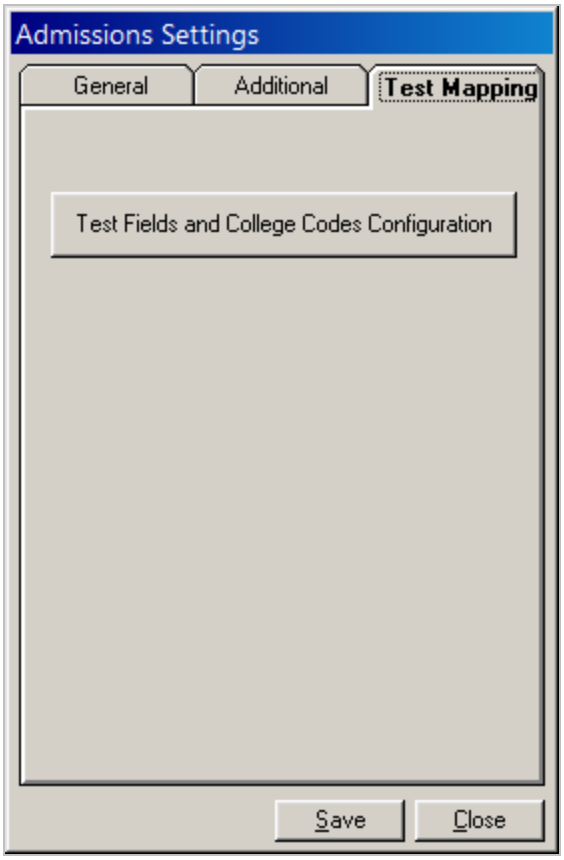
11. Click **Finish** to close the Conditional Required Fields form. The Selected Fields list is refreshed to show the Field Set numbers. The Field Set background colors are saved when you click Save on the Quick Lead Setup Form.
12. Click **Save**. Your Quick Lead Form design is saved.
13. Click **Close** to close the form.
14. Click **Save** and **Close** to close the Admissions Settings form.

Admissions - Test Mapping Tab

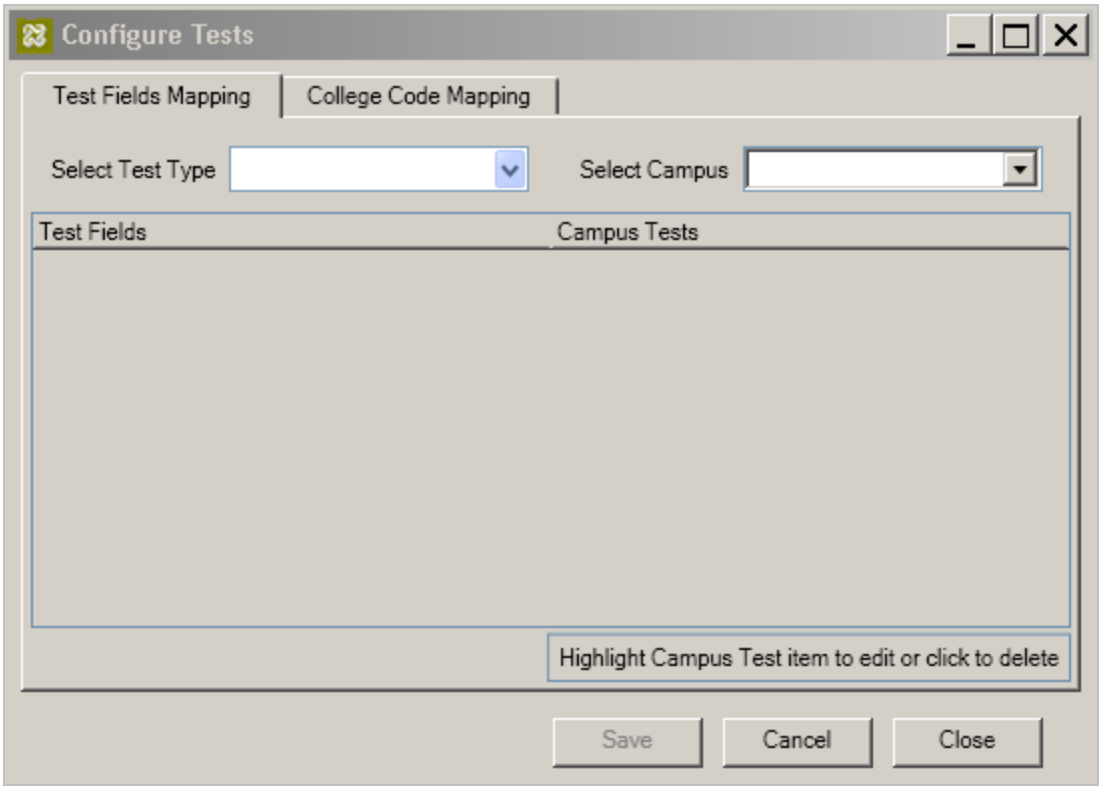
Use the Test Mapping tab of the Admissions Settings form to configure Test Fields and College Code on a campus level. The campus is determined by matching the specified tests and college code in the test import file to the campus where that code is specified as the default college code.

To configure the test mapping settings:

1. Navigate to **Setup** > **Admissions**. The Admissions Settings form is displayed.
2. Select the **Test Mapping** tab.



3. Click the **Test Fields and College Codes Configuration** button. The Configure Tests form is displayed.



4. On the Test Fields Mapping tab, select test types and campuses.

    a. In the **Select Test Type** field, select the test types to be imported into CampusNexus Student. Currently, CampusNexus Student supports the importing of the following entrance tests:

    SAT - (Scholastic Aptitude Test) - is a standardized test for college admissions in the United States.

    ACT - (American College Test) - a college entrance exam in the United States.

    CAAP - (Collegiate Assessment of Academic Proficiency) - is the standardized, nationally named assessment program from ACT that enables postsecondary institutions to assess, evaluate, and enhance the outcomes of their general education programs.

    COMPASS - (Computer-Adaptive Placement Assessment and Support System) - is a comprehensive software package developed by ACT to help postsecondary institutions to place students into appropriate course levels.

    b. In the **Select Campus** field, select the campus to map the Campus Tests to actual Test Fields at the campus level.

    Note: One test type can be configured differently for multiple campuses; however, only one campus can use one configuration per test type.

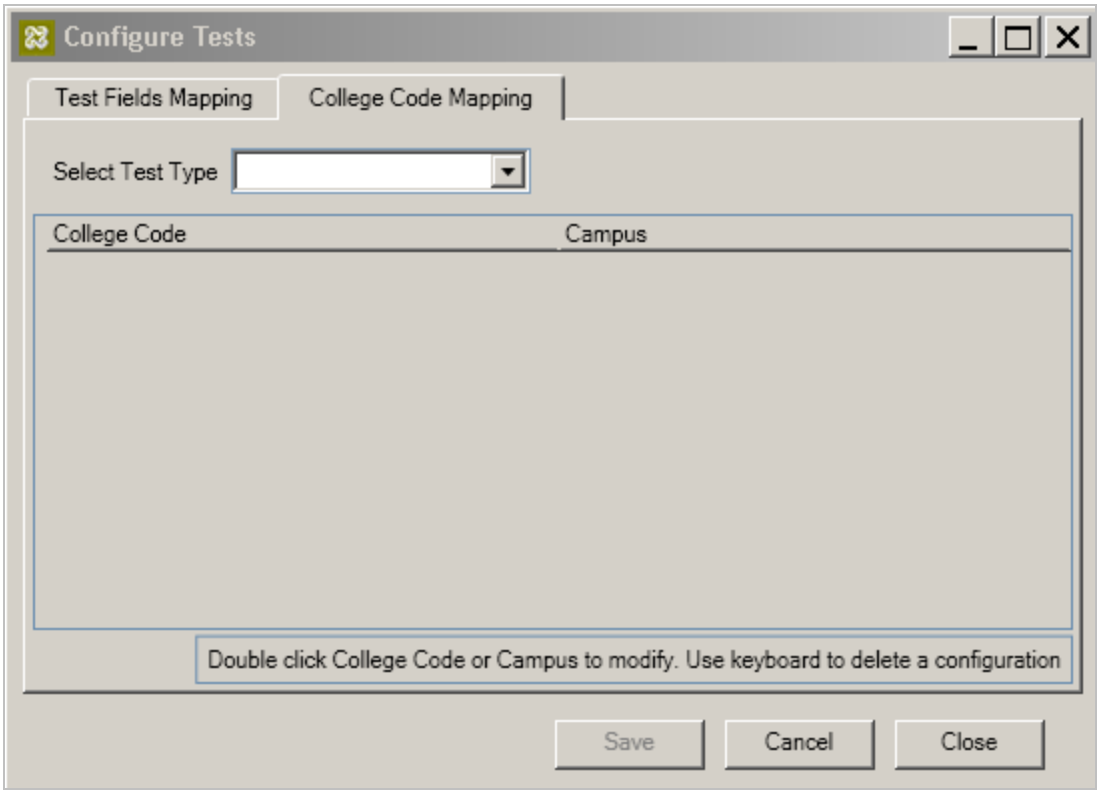
5. After the Test Type and Campus options are selected, the test fields related to the selected test type are displayed in the first column of the Test Fields grid. In the second column, **select the campus tests for each Test Field**. For each field, the drop-down of the Campus Tests column contains all campus tests related to the campus selected in the Select Campus field.

    Note: You cannot map any one campus test with two test fields.

You can select a campus test other than the default. You can also delete the campus test. Test fields without a matching campus test result in the tests not being imported during the Import Test Scores process.

6. On the College Code Mapping tab, **select test types for college code mapping**. The list of test types only displays the entrance tests types that can be imported into CampusNexus Student.

   After the test type is selected from the Select Test Type drop-down field, a row is displayed in a grid under the College Code and Campus fields.



   a. Double-click the row in the grid under the College Code column. Use this option to enter a new college code manually. You can enter a college code and select a campus in the Campus column to map the college code to the campus.

      To modify a College Code or Campus, double-click on the row within the grid.

      To delete a College Code or Campus, use the Delete key on your keyboard.

   b. The Campus column allows you to map a campus to a College Code. You can configure multiple college codes for one campus, but only one campus for a specific college code.

Setup > Financial Aid

When you navigate to Setup > Financial Aid, the Financial Aid - Settings form is displayed. Use this form to configure packaging options for financial aid, detail and summary award letters, receipt notifications, direct loan setup, disbursing of financial aid funds, hold codes, and Clearinghouse processing. The form contains the following tabs:

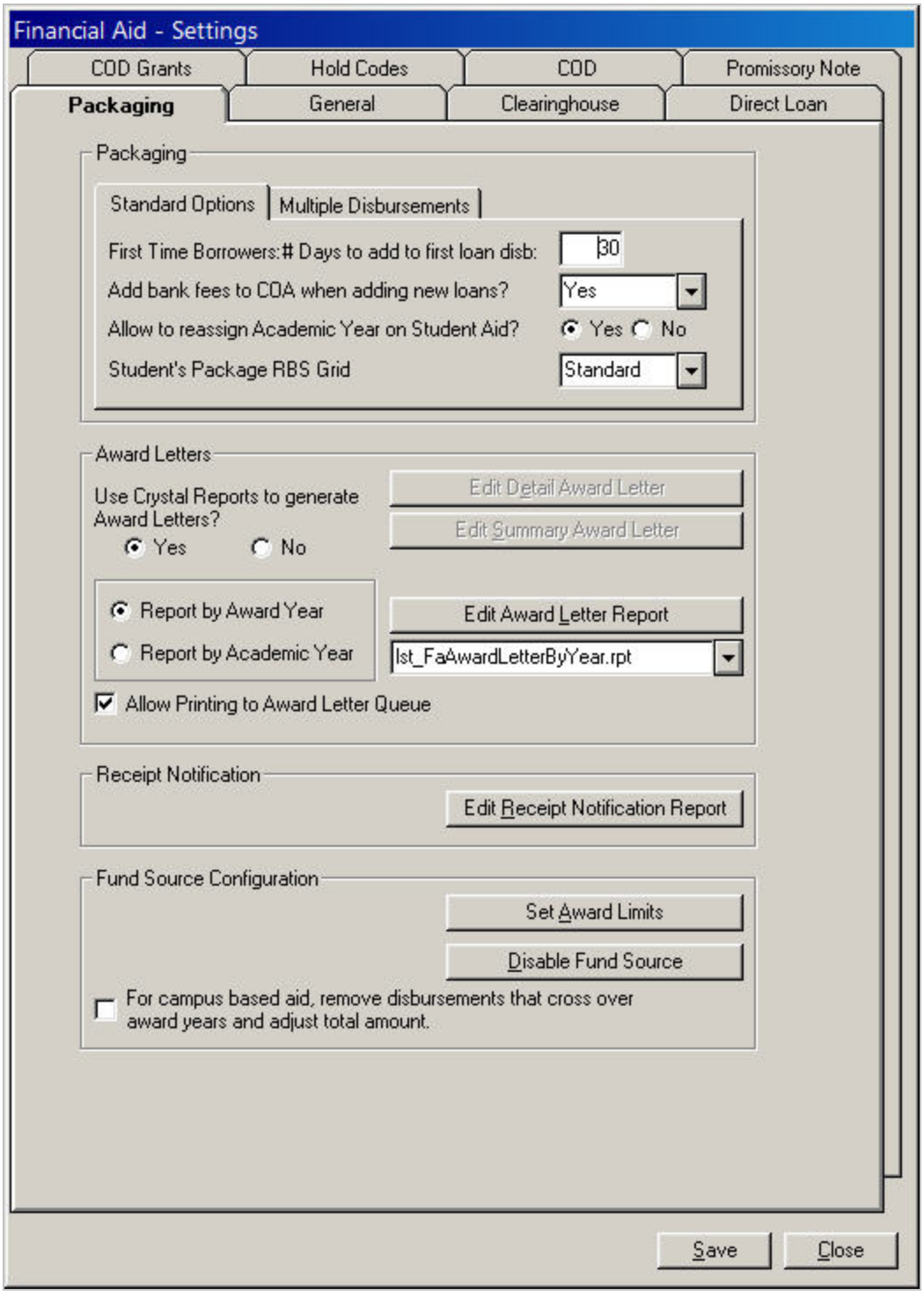
- Packaging
- General
- Clearinghouse
- Direct Loan
- COD Grants
- Hold Codes
- COD
- Promissory Note

Financial Aid Settings - Packaging Tab

Use the Packaging tab of the Financial Aid Settings form to configure various packaging features.

To set up financial aid packaging options:

1. Navigate to **Setup > Financial Aid**. The Financial Aid Settings form displays the **Packaging** tab.

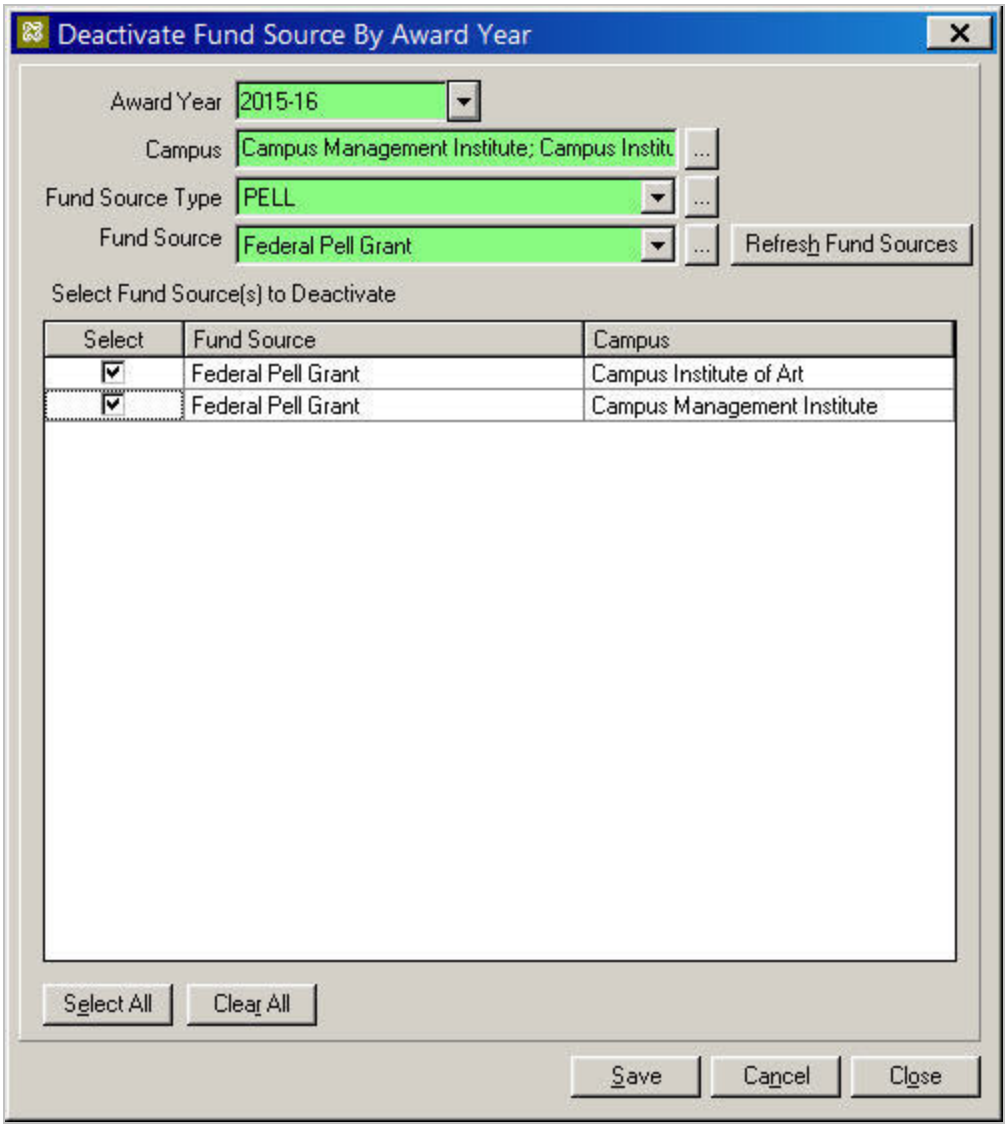


2. Specify appropriate options. For more information, see Field Descriptions.
3. Click **Save**.
4. Click **Close** to close the form.

Field Descriptions

Field	Description
Packaging - Standard Options Subtab	
First Time Borrowers	Specify the number of days to add to the first loan disbursement date for First Time Borrowers. See also Grade Level and First Time Borrowers when enrolling students, packaging, adding academic years, importing ISIRs, and approving disbursements to pay.
Add bank fees to COA when adding new loans?	This flag controls a user prompt and a procedure to add bank fees to the Cost of Attendance (COA) when loans are added in packaging. Select one of the following options: • Yes • No (default) • Prompt User
Allow to reassign Academic Year on Student Aid?	Select **Yes** to allow reassigning financial aid from one academic year to another. Select **No** to prevent reassigning financial aid from one year to another.
Student's Package RBS Grid	Select **Standard** to allow processing Financial Aid packages using the standard Financial Aid Packaging form. Select **Alternate** to use a user-specific Financial Aid Packaging form. For more information, see Packaging.
Multiple Disbursements Subtab	
Exclude Weekends	For more information, see Multiple Disbursement System Settings.
Exclude Holidays	
Use State from ISIR	
Award Letters	

Field	Description
Use Crystal Reports to generate Award Letters?	You can edit award letters in Microsoft Word or Crystal Reports. a. If you select **Yes** to use Crystal Reports, the options **Report By Award Year** (default) and **Report by Academic Year** are enabled. Select one of the options. Click **Edit Award Letter Report** to select an award letter from the list and open Crystal Reports. You must have the Crystal Reports application available on your workstation to edit these award letters. **Note**: The Truth in Lending Statement is a function of the Crystal Reports Award Letter. When a fund source type is Cash or Other, Crystal Reports prints out lending information associated with each specific fund source. Information includes: Annual Percentage Rate, Finance Charge, Amount Financed and Total Payments. b. If you select **No**, the **Edit Detail Award Letter** and**Edit Summary Award Letter** buttons are enabled. When you click either button, CampusNexus Student opens the award letter in Word. When you exit from Word after viewing or editing the letter, you are returned to CampusNexus Student.
Receipt Notification	
Edit Receipt Notification Report	Click this button edit the report produced when financial aid is received for a student. You must have access to Crystal Reports (R) to use this option. For more information, see Notifications of Receipt.
Fund Source Configuration	
For campus based aid, remove disbursements that cross over award years and adjust total amount	Select this option to configure CampusNexus Student to truncate campus-based aid awards during crossover periods.
Set Award Limits	Click this button to establish the maximum allowable award amounts for fund sources. For more information, see Award Year Settings and Fund Source and Campus Financial Aid and Packaging.

Field	Description
Disable Fund Source	Click this button to deactivate a fund source for an award year and campus. The Deactivate Fund Source By Award Year form is displayed.  1. Select the applicable **Award Years**, **Campuses**, and **Fund Source Types**. Click ... beside each field to make multiple selections. 2. Click the **Refresh Fund Sources** button. A list of fund sources to deactivate is displayed. 3. Select the fund source's **Select** check box or use **Select All** or **Clear All** to select all or clear all fund sources listed. 4. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

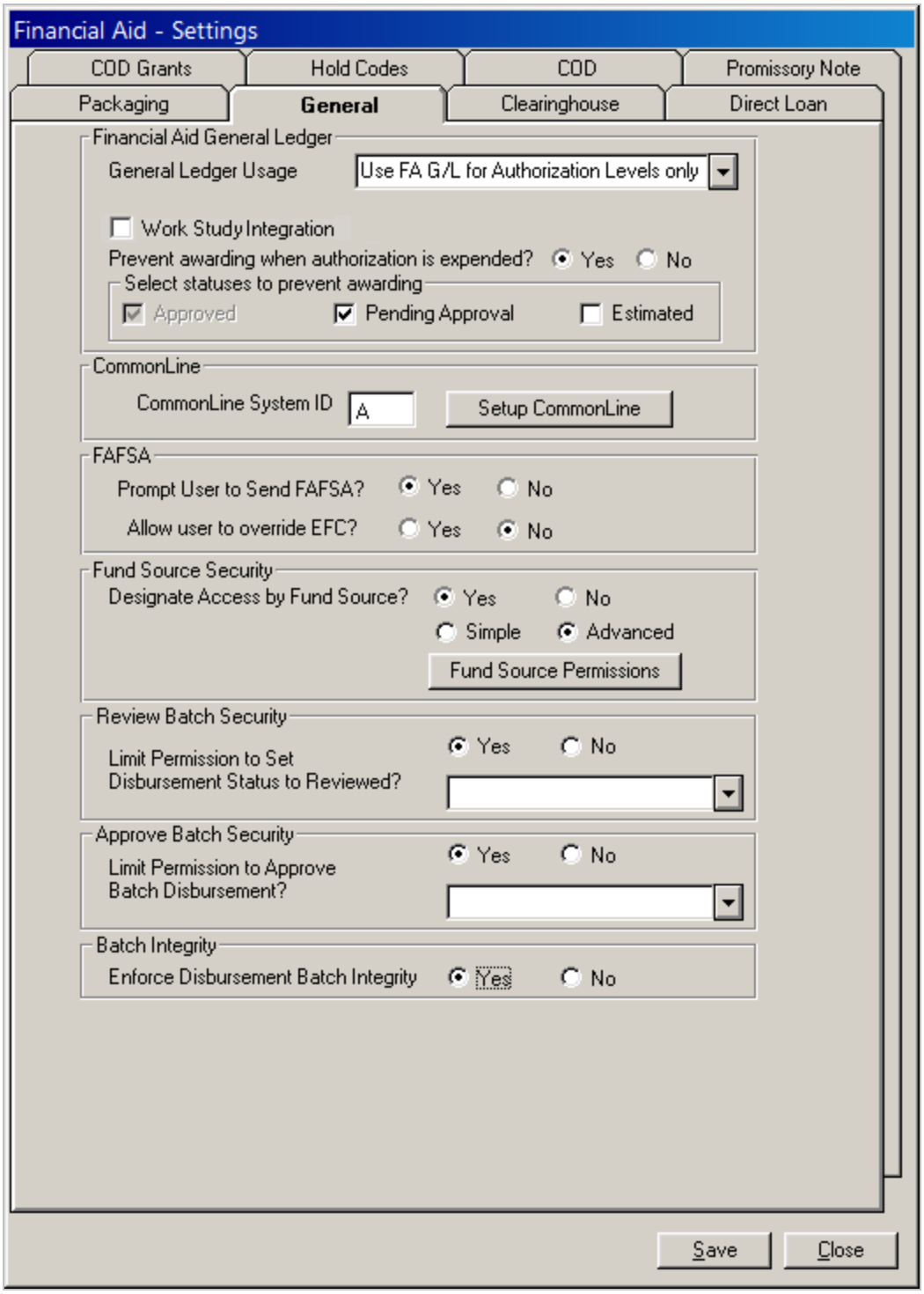
Financial Aid Settings - General Tab

Note: Please access Regulatory Help for the latest content about FAFSA, ISIR, and COD processing.

Use the General tab of the Financial Aid (FA) Settings form to specify the General Ledger (G/L) usage, FAFSA settings, fund source permissions, batch permissions, and CampusVue Finance, HR & Payroll settings for work study integration.

To set up general financial aid options:

1. Navigate to **Setup > Financial Aid**. Select the **General** (tab).



2. Specify appropriate options. For more information, see Field Descriptions.
3. If CampusVue Finance, HR & Payroll is installed, select applicable CampusVue Finance, HR & Payroll Work

Study Integration options.

4. Click **Save**.
5. Click **Close** to close the form.

Field Descriptions

Field	Description
Financial Aid General Ledger	
General Ledger Usage	Select the level of general ledger (G/L) integration for your system. The options are: • Use All FA G/L Functions • Use FA G/L for Authorization Levels Only
Campus Vantage Work Study Integration - OR - Work Study Integration	This check box is displayed only when CampusNexus Student is integrated with an accounting system. • If the accounting system is CampusVue Finance, HR & Payroll, the check box is labeled "Campus Vantage Work Study Integration". • If the accounting system is CampusNexus Finance, HR & Payroll, the check box is labeled "Work Study Integration". Select the check box to activate the Work Study Integration option. If the check box is selected for CampusNexus Finance, HR & Payroll, the *Add Payment* and *Delete Payment* buttons on the Work Study Payment form are disabled. If the check box is cleared (default), the Work Study integration is stopped, no records of work study awards are exchanged between CampusNexus Finance, HR & Payroll and CampusNexus Student, and the *Add Payment* and *Delete Payment* buttons on the Work Study Payment form are enabled. For more information, see CampusVantage_Work_Study_Integration.
Prevent awarding when authorization is expended?	Select **Yes** to prevent users from awarding funds from Title IV sources when the institution's authorized amount has been expended and select appropriate statuses to prevent the awarding of Title IV funds. Valid statuses are: • Approved (read-only) • Pending Approval • Estimated Based on the value of the check boxes, the *Packaged* amount for fund sources will be adjusted when awards are made with *Estimated* and *Approved* statuses. In earlier versions of CampusNexus Student, only awards with an *Approved* status affected this amount. New business rules consider both the *Estimated* and *Pending Approval* statuses.
FAFSA	

Field	Description
Prompt User to Send FAFSA	Select **Yes** to see a reminder to send the FAFSA each time it is saved. The default is No. **Note**: In Regulatory 9.0 and later, the user is no longer prompted to send the FAFSA when Yes is selected for this option. The FAFSA export functionality was deprecated because the Department of Education's FAFSA on the Web has become the recommended method of submitting application data. Use one of the following methods to submit application data: 1. Students can complete an application online at https://fafsa.gov/ and send it directly to the Central Processing System (CPS) - this is the Department's recommended method. 2. Financial Aid Administrators can submit a student's application data using FAA Access to CPS Online at https://faaaccess.ed.gov. 3. Students can print the FAFSA PDF and fill it out by hand, or they can type their data on the PDF before printing and mailing it. 4. Students who have limited or no Internet access can choose to complete and submit their application by calling 1-800-433-3243.
Allow user to override EFC?	Select **Yes** if you want the FAFSA calculation to prompt you to store the recalculated Expected Family Contribution (EFC) value. The default is No. The **Recalculated EFC** field allows you to enter an EFC value to be used in the remaining balance to schedule and auto-packaging functions. The Recalculated EFC is incorporated in several reports when the value of the setup flag is not NULL. In earlier versions of CampusNexus Student you were required to submit an ISIR correction to change an EFC. Some situations resulted in a need to change the EFC without requesting a new ISIR.
Fund Source Security	
Designated Access by Fund Source?	Select **Yes** if you want to set up permissions for each fund source.
Fund Source Permissions	Select **Simple** or **Advanced** and click Fund Source Permissions to set up permissions for each fund source.
Review Batch Security	
Limit Permission to Set Disbursement Status to Reviewed?	Select **Yes** to select a staff function that is given the corresponding permission.
Approve Batch Security	
Limit Permission to Approve Batch Disbursements?	Select **Yes** to select a staff function that is given the corresponding permission.
Batch Integrity	
Enforce Disbursement Batch Integrity	Select **Yes** to allow financial aid officers to move successful disbursement approvals to Student Accounts without sacrificing batch integrity and force reports to display the parent batch ID number when separate batches are created from a parent batch. The default is No.

CampusVue Finance, HR & Payroll Work Study Integration

Clients using CampusVue Finance, HR & Payroll may enter time cards in CampusVue Finance, HR & Payroll for students on Work Study if the Work Study integration feature selected. Once the time cards are entered, the information is fed into CampusVue Finance, HR & Payroll's payroll application, the funds are disbursed through the payroll system, and the disbursement is recorded in CampusNexus Student. This feature eliminates the need for CampusNexus Student users to enter gross amounts and hours to record Work Study hours performed by students to ensure the students do not work over the approved amount.

In CampusNexus Student, when Work Study is packaged with a status of *Approved*, the award amount and basic student information create a Work Study Document in the Document Approval Queue for payroll staff. If adjustments or cancellations occur on an existing Work Study award, the net change from the previous approved award amount is sent to CampusVue Finance, HR & Payroll.

The transactions sent to CampusVue Finance, HR & Payroll create documents that must be approved by payroll staff. Payroll staff sets up the student employee's personal information, including a Work Study Pay Type before being allowed to link the document to the new student employee and approve the document.

In CampusVue Finance, HR & Payroll, when time cards are entered, a drop-down list contains the possible Work Study awards associated with the student employee. CampusVue Finance, HR & Payroll verifies that the Work Study award is approved, and that the amount of the time card summed with any previous disbursements does not exceed the award amount before a time card can be entered or approved. This prevents disbursements from being sent to the payroll system if the student's award status has changed.

When time cards are approved in CampusVue Finance, HR & Payroll, records are created reflecting the date and hours the student worked and the gross amount for that approved time card. The amount disbursed is not updated until the payroll process has run.

On CampusNexus Student's Financial Aid Work Study form, if CampusVue Finance, HR & Payroll is installed, Work Study integration is turned on, and the Financial Aid Disbursement Check Number is blank, a message displays *Advisory: Time card is entered in payroll, but not yet paid.*

When the payroll process is run, CampusVue Finance, HR & Payroll records the disbursement check number and date, and amount disbursed to reflect the paid time cards. CampusVue Finance, HR & Payroll validates that the gross paycheck amount equals the sum of the financial aid disbursements records' gross amounts associated with the paycheck.

The Work Study award may ***not*** be deleted, however, it may be adjusted or canceled. In CampusNexus Student's Financial Aid Package form, if you attempt to delete a Work Study award, the following message is displayed: *This Work Study Award has been sent to Payroll and can not be deleted. You may adjust or cancel the record.*

If you attempt to cancel a Work Study award that is already associated with a disbursements, a message states that the award can only be *adjusted* down to the sum of the amount of the disbursements with and without check numbers.

If you edit a Work Study Award and click "Add Payment" or "Delete Payment", the Financial Aid Student Work Study form displays the message *Work Study Disbursements are entered via Continue with adding a disbursement?* Click **Yes** to continue adding the payment in CampusNexus Student, or click **No** to allow the payment to be maintained in CampusVue Finance, HR & Payroll.

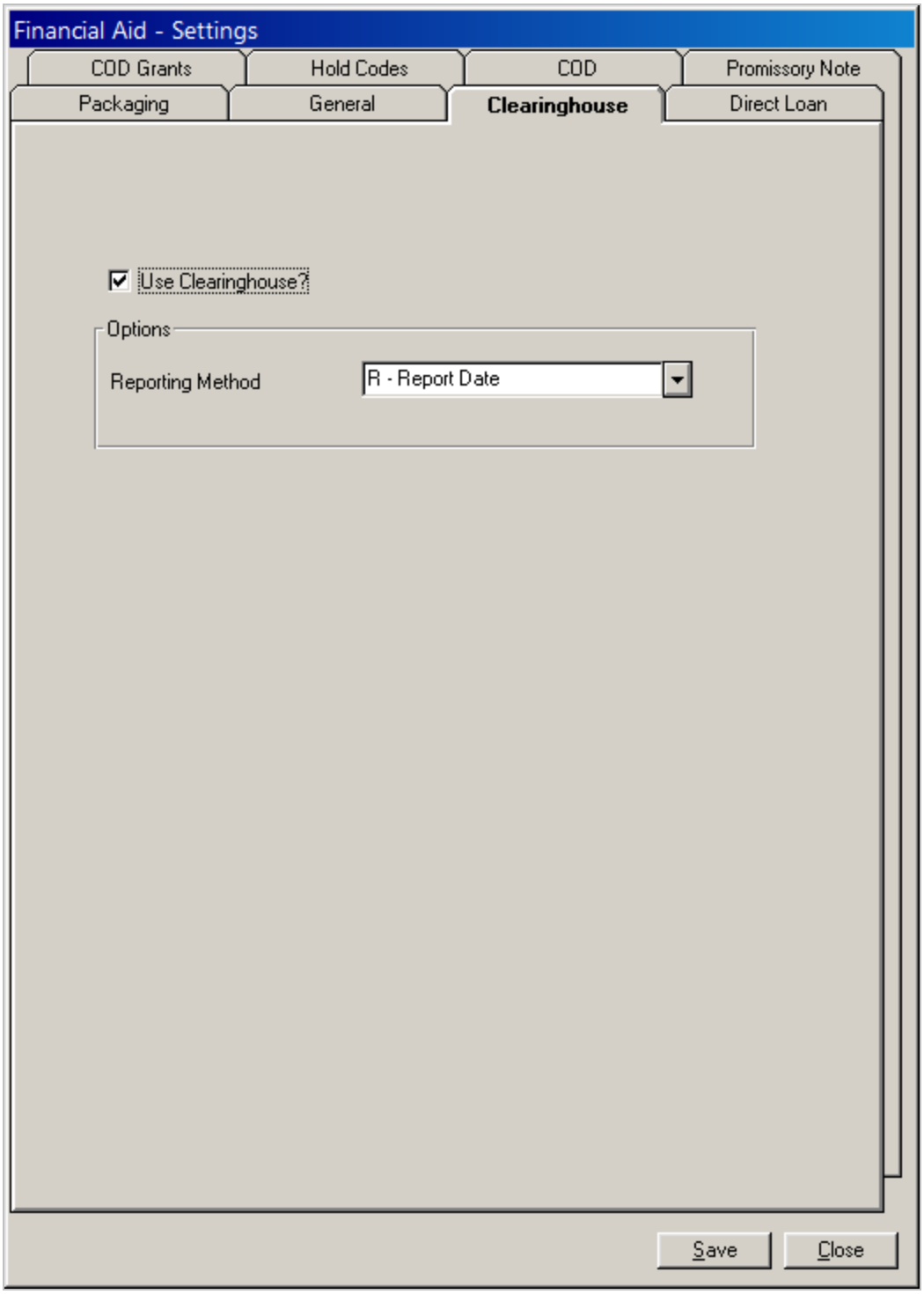
Financial Aid Settings - Clearinghouse Tab

Financial Aid Clearinghouse processing automates reporting, reducing the amount of time and money spent on SSCR records.

Note: Starting July 1, 2014, a new Clearinghouse Export file format was adapted, and the file format produced by using the Clearinghouse menu selection in CampusNexus Student is no longer valid. Please use the Clearinghouse (2014-2015 and later) menu option, and review Regulatory Help for content associated with this new feature. The options on the Clearinghouse tab are campus-specific. The settings are for your default campus. (The campus in which you are working at the time the options are set.) To select these options for multiple campuses, you must change your default campus before making the selections.

To set up financial aid Clearinghouse options:

1. Navigate to **Setup > Financial Aid**. Select the **Clearinghouse** tab.



2. To use the Clearinghouse, select the **Use Clearinghouse?** check box.
3. Select the Reporting Method **R - Report Date**.

Note: The T-Term option is no longer valid for Clearinghouse processing. This selection will be ignored if chosen.

4. Click **Save**.

Financial Aid Settings - Direct Loan Tab

Use this form to provide information required by Common Origination and Disbursement (COD) and CampusNexus Student when processing Direct Loans. In particular, you must indicate whether your institution is participating in the Direct Loan Program via CampusNexus Student.

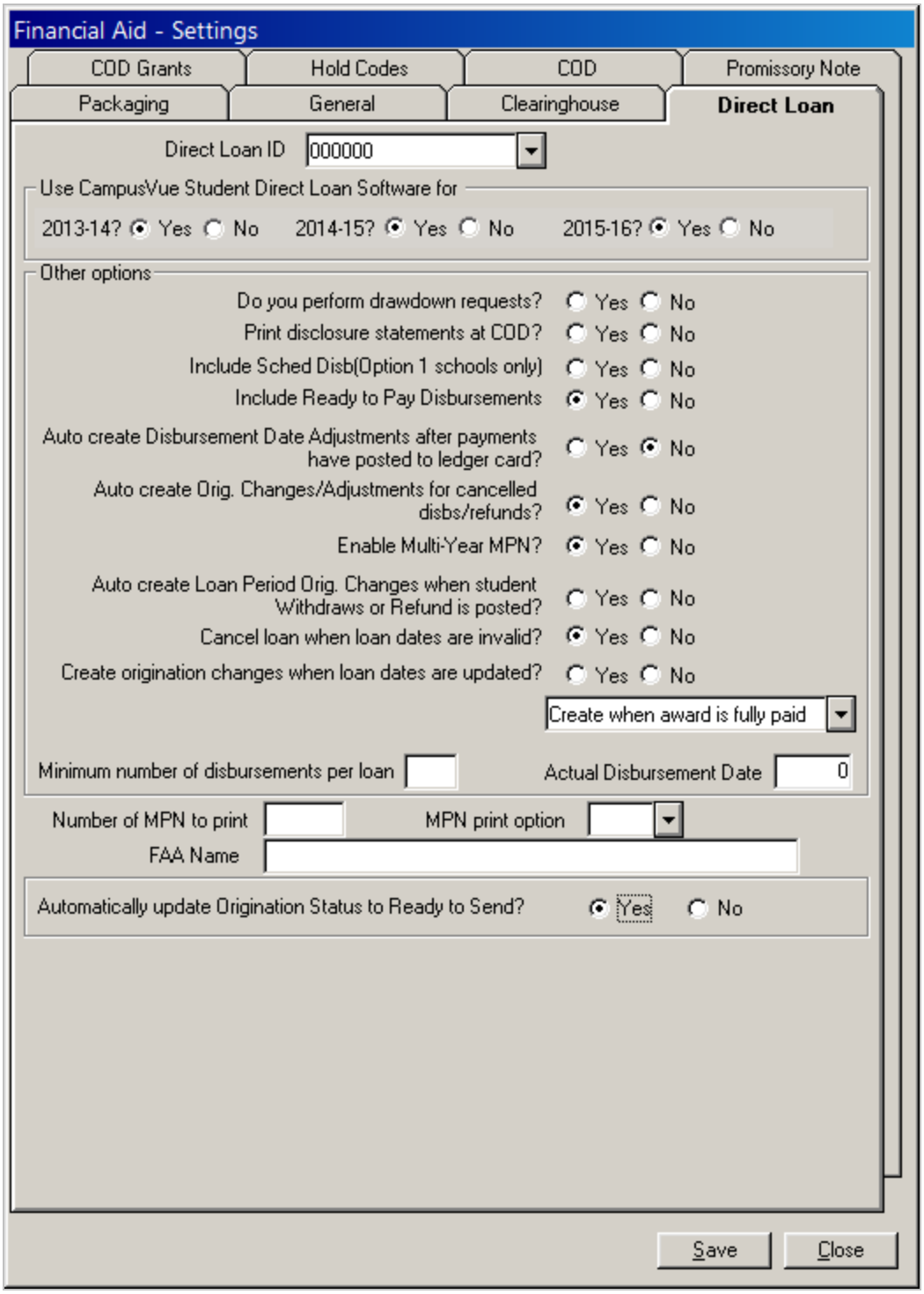
Note: Although not normally considered part of Application Processing, as part of the 2007-2008 Application Processing Update, CampusNexus Student must allow customers to award FFEL and Direct Loans based on the new origination fees defined when the first disbursement date of the disbursement is on or after July 1, 2008 and based on the current origination fees if the first disbursement date is prior to that date.

Fee Percentages per Disbursement Dates

Fee %	Earliest Disbursement Date Range
3.0	Prior to 2007-07-01
2.5	2007-07-01 to 2008-06-30
2.0	2008-07-01 to 2009-06-30
1.5	2009-07-01 to 2010-06-30
1.0	2010-07-01 and forward

To set up direct loan information for a campus:

1. Navigate to **Setup > Financial Aid**. Select the **Direct Loan** tab.



2. Specify appropriate options. For more information, see Field Descriptions.

3. Click **Save**.
4. Click **Close** to close the form.

Field Descriptions

Field	Description
Direct Loan ID	Select the Direct Loan ID to which the settings on this tab apply. If yours is a multi-campus institution, you may have more than one Direct Loan ID. Click here to configure them. If you have more than one Direct Loan ID, be sure to complete this form for *each* ID.
Use CampusNexus Student Direct Loan Software for	Select **Yes** to use the CampusNexus Student features for direct loan management in each award year, otherwise select **No**. If the servicer link is *enabled* by selecting a servicer, RFMS and Direct Loan must be *disabled* for the Direct Loan ID and Reporting Pell ID in the Campus Financial Aid Settings.
Do you perform draw-down requests?	Select **Yes** if your institution uses drawdown requests for direct loans; otherwise select **No**.
Print disclosure state-ments at COD?	Select **Yes** or **No** according to where your disclosure statements are printed.
Include Sched Disb. (Option 1 schools only)	Select **Yes** to include scheduled disbursements in the disbursement export file. If you elect to export scheduled disbursements, CampusNexus Student selects disbursements that are scheduled up to seven (7) days before the disbursement or thirty (30) days after the date of the export.
Include Ready to Pay Disbursements	Select **Yes** if this option is applicable for your institution; otherwise select **No**.

Field	Description
Automatically create Disbursement Date Adjustments after payments have posted to ledger card?	Select **Yes** if you want CampusNexus Student to compare reported direct loan scheduled payment dates received to the CampusNexus Student actual paid dates to assess if there is a difference. If there is a difference, the dates can be corrected to ensure the institution is in compliance with Federal Regulations that specify that the dates must match; otherwise select **No**. This option is only visible when FAA is enabled. Additionally, this option is only visible to users with the appropriate permissions. For Direct Loans, the settings for the Direct Loan tab are applied by the Direct Loan ID. A process validates disbursements that need disbursement date adjustments after payments have been posted to the ledger card. It validates if the disbursement date posted to the ledger card is not equal to the accepted disbursement date at COD. This process validates the dates for Pell, TEACH, and Direct Loans. If the transaction date of the accepted Pell / TEACH/DL disbursement record [fadldisb.transactiondate / fapelldisb.disbursementdate / FaCODGrantDisb.disbdate] does not match the date of the disbursement's ledger card posting date (satrans.date), a disbursement date adjustment record for the transaction is created and queued for export through the COD Export job. In each case above: • Disbursement date adjustment record is created in a status of Ready to Send, that would be sent to COD after the COD Export job ran successfully. • Adjustment record created at a minimum to comply with our current adjustment creation when adjustments are manually created in the Core product. • Adjustment record must comply with our current COD Export / Import formats. CampusNexus Student uses the existing Exception Management framework. CampusNexus Student does not create a new adjustment record if a pending adjustment exists. Instead, a new exception, CODEXPRT0059, is created that states '*Disbursement Date Adjustment Not Created. Disbursement has a pending adjustment. Transmit pending adjustment before continuing*'. The following steps resolve the exception: a. Navigate to **Daily > Automated Processes > Job Management**. b. Select the appropriate **COD Export Job**. c. Select **Run Now**.
Auto create Orig. Changes/Adjustments for canceled disbs/refunds?	Select **Yes** to automatically create origination changes for canceled disbursements and loan amounts when a student is moved to a Permanent Out category; otherwise select **No**.
Enable Multi-Year MPN?	Select **Yes** to enable the multi-year master promissory note (MPN) feature; otherwise select **No**.

Field	Description
Auto create Loan Period Orig Changes when student Withdraws or Refund is posted?	Select **Yes** to automatically create Origination changes for the Loan Period End Date; otherwise select **No**. This setting applies to Direct Loans that have an Origination status of Accepted or Batched to Send. The origination change record is created in the following scenarios: • When a student is moved to a Permanent Out Category after the first payment period and the following disbursements are canceled, an origination change is created to adjust the Loan Period End Date to the end of the payment period that has not been canceled. • When a disbursement after the first payment period is fully refunded, an origination change is created to adjust the Loan Period End Date to the end date of the last earned disbursement. Also, an origination change is created to adjust the award amount to reflect the amount for any refund that is posted.
Cancel loan when loan dates are invalid?	Select **Yes** to allow the Student Pace Evaluation (SPE) tool to cancel a direct loan or any remaining scheduled disbursements of the direct loan: • When the SPE update causes the loan's BBAY start date to be later than the Award Year's end date. - OR - • When the SPE update causes the BBAY end date to be earlier than the Award Year's start date. Otherwise select **No**. CampusNexus Student will also create Origination Changes for the cancellation if the **Auto create Orig. Changes/Adjustments for canceled disbs/refunds?** option is set to Yes. Additionally, you can configure CampusNexus Student to notify a staff member when a direct loan is cancelled or cannot be cancelled by SPE. See Auto Update Alert on the Financial Aid tab of the Campus Information form.

Field	Description
Create origination changes when loan dates are updated?	Select **Yes** if you want CampusNexus Student to automatically create origination change records when any of the following dates are updated for a Direct Loan (DIRSUB, DIRUNSUB, and DIRPLUS) by Academic related activities, such as adding or removing transfer credits, and the Student Pace Evaluation (SPE) tool adjusting the loan dates due to changes on the student's schedule, etc.: • Academic Year (AY) start/end dates • Loan Period (LP) start/end dates • Disbursement dates This setting has two options when turned on: • Select **Always create** if you want CampusNexus Student to immediately create origination change records when loan dates are modified by the SPE tool. • Select **Create when award is fully paid** if you want CampusNexus Student to verify that the award has been fully paid before creating origination change records. An award is fully paid if all disbursements have been released to COD. **Note**: Origination changes are created only for direct loans that have Origination Status of "Accepted" or "Batched to Send".
Minimum number of disbursements	Specify the minimum number of disbursements per loan.
Number of MPN	Specify the number of Master Promissory Note (MPN) to print.
MPN print option	For each loan in the MPN print option field, select the option type: • F - Print prom note at institution site • R - COD prints prom notes and returns them to institution • S - COD prints prom notes and sends the notes to the borrower • Z - Reprint at COD
FAA Name	Specify the name of your Financial Aid Administrator for Direct Loans.
Automatically update Origination Status to Ready to Send?	Select **Yes** to automatically promote the origination status from "Not Ready" to "Ready to Send" when a valid ISIR is on file for the student and the Direct Loan is in an Approved status; otherwise select **No**.

Financial Aid Settings - COD Grants Tab

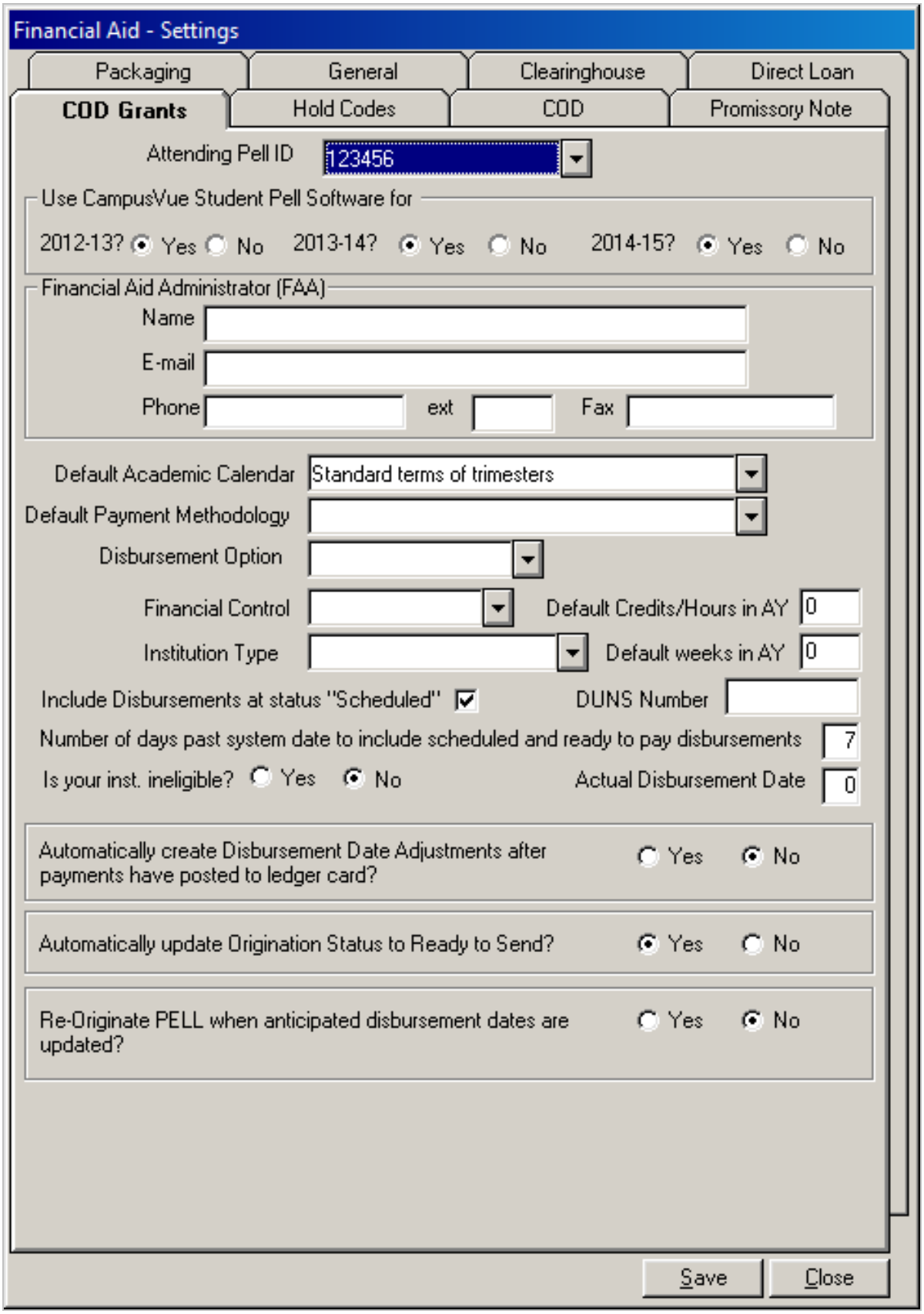
The Department of Education requires certain information about your Financial Aid Department and your programs. The COD Grants tab of the Financial Aid Settings form is where you provide that information for CampusNexus Student to use when processing data for COD grants.

Notes:

- Since the ACG and SMART program was phased out, these fund sources no longer apply for the 2011-2012 award year. Accordingly, CampusNexus Student was updated so that these fund sources can no longer be packaged. The fund source type options still remain for fund source configuration at this time, but at a future date these options will be removed so no new additional award using this type will be created.
- For COD grants, CampusNexus Student builds the origination record when packaging from any method. The packaging process uses the student AY grade level to populate grade level information on the origination record. The validations within CampusNexus Student for the COD Grant awards inform the user if any required information is missing before the grants are exported to COD.

To set up general COD grant options:

1. Navigate to **Setup > Financial Aid**. Select the **COD Grants** (tab).


Financial Aid - Settings
Packaging
General
Clearinghouse
Direct Loan
COD Grants
Hold Codes
COD
Promissory Note
Attending Pell ID
123456
Use CampusVue Student Pell Software for
2012-13? Yes No
2013-14? Yes No
2014-15? Yes No
Financial Aid Administrator (FAA)
Name
E-mail
Phone
ext
Fax
Default Academic Calendar
Standard terms of trimesters
Default Payment Methodology
Disbursement Option
Financial Control
Default Credits/Hours in AY
0
Institution Type
Default weeks in AY
0
Include Disbursements at status "Scheduled"
DUNS Number
Number of days past system date to include scheduled and ready to pay disbursements
7
Is your inst. ineligible? Yes No
Actual Disbursement Date
0
Automatically create Disbursement Date Adjustments after payments have posted to ledger card? Yes No
Automatically update Origination Status to Ready to Send? Yes No
Re-Originate PELL when anticipated disbursement dates are updated? Yes No
Save
Close

2. Specify appropriate options. For more information, see Field Descriptions.
3. Click **Save**.
4. Click **Close** to close the form.

Field Descriptions

Field	Description
Attending Pell ID	This list shows all unique IDs on file. Select one.
Use CampusNexus Student Pell Software for 2010-11? 2011-12? 2012-13?	Select **Yes** or **No** for each year. If the servicer link is turned on by selecting a servicer (Setup / Campus Locations / Financial Aid), RFMS and Direct Loan must be turned off for the Direct Loan ID and Reporting Pell ID in the Financial Aid Settings.
FAA Name	Specify the name of your Financial Aid Administrator. This name is used on correspondence with the Department of Education
FAA E-mail	Specify the FAA's e-mail address.
FAA Phone and Extension	Specify the FAA's telephone number and extension.
FAA Fax #	Specify the fax telephone number for the FAA's office.
Default Academic Calendar	Select one of the following: • **1** Credit hours - non-standard terms • **2** Credit hours - standard terms of quarters • **3** Credit hours - standard terms of semesters • **4** Credit hours - standard terms of trimesters • **5** Clock hours • **6** Credit hours without terms
Default Payment Methodology	Select one of the following: • **1** Credit hour with standard terms in which Fall through Spring terms equal or exceed 30 weeks, or equal or exceed academic year with waiver (AC: 2,3,4) • **2** Credit hour with standard terms in which Fall through Spring terms are less than 30 weeks without waiver (AC: 2,3,4) • **3** Credit hour with standard or non-standard terms (AC: 1-4) • **4** Clock hour or Credit Hour without terms (AC: 5,6) • **5** Nonresidential portion of programs offered by correspondence without terms (AC: 1-4,6) **Note**: The options you will see in this field vary according to your choice of Academic Calendar.
Disbursement Option	Select 'Advanced Funding' or 'Just in Time'
Financial Control	Select Public, 'Private, nonprofit', or Proprietary
Default Credits/Hours in AY	Specify the default number of credits or clock hours in your school's academic year.

Field	Description
Institution Type	Select one of the following codes: • Less than one year • 1 year, less than two years • 2 years, less than three years • 3 years, less than four years • 4 years (baccalaureate degree only) • 5 years or more
Default Weeks in AY	Specify the default number of weeks in your school's academic year.
Include Disbursements at Status "Scheduled"	Select or clear this check box as required. Pell allows a school to report scheduled disbursements up to 7 days out from the reporting date.
DUNS Number	Specify the school's 9-digit DUNS number. The Data Universal Numbering System (DUNS) developed by the Dunn and Bradstreet Corporation is used to identify businesses in automated files.
Number of days past system date to include scheduled and ready to pay disbursements	Specify the number of days out from the current date (up to 30) for which scheduled disbursements are to be reported to Pell.
Is your institution ineligible?	Select **Yes** or **No**. Since 2001-02, if a school is ineligible, the only additional piece of information the school must report is the payment period begin date.
Actual Disbursement Date	Specify the actual date.

Field	Description
Automatically create Disbursement Date Adjustments after payments have been posted to ledger card	Select **Yes** or **No**. An automated solution compares reported COD scheduled payment dates at COD received to the CampusNexus Student actual paid dates. If there is a difference, the dates can be corrected to ensure the institution is in compliance with Federal Regulations that specify that the dates must match. You can configure an option to auto create disbursement date adjustments after payments have posted to the ledger card for COD Grants. This configuration is only visible when FAA is enabled. Additionally, this configuration is only visible to users with the appropriate permissions. For COD Grants, the settings for the COD Grants tab are applied by the Pell ID. A process validates disbursements that need disbursement date adjustments after payments have been posted to the ledger card. It validates if the disbursement date posted to the ledger card is not equal to the accepted disbursement date at COD. This process validates the dates for Pell, TEACH, and Direct Loans. If the transaction date of the accepted Pell / TEACH/DL disbursement record [fadldisb.transactiondate / fapelldisb.disbursementdate / FaCODGrantDisb.disbdate] does not match the date of the disbursement's ledger card posting date (satrans.date), a disbursement date adjustment record for the transaction is created and queued for export through the COD Export job. In each case above: • A disbursement date adjustment record is created in a status of Ready to Send, that would be sent to COD after the COD Export job ran successfully. • An adjustment record is created at a minimum to comply with our current adjustment creation when adjustments are manually created in the Core product. The adjustment record must comply with current CampusNexus Student COD Export / Import formats. CampusNexus Student uses the existing Exception Management framework. It will not create a new adjustment record if an existing pending adjustment exists. Instead, a new exception,CODEXPRT0059, is created that states 'Disbursement Date Adjustment Not Created. Disbursement has a pending adjustment. Transmit pending adjustment before continuing'. The following steps resolve the exception. a. Navigate to: Daily > Automated Processes > Job Management. b. Select the appropriate COD Export Job. c. Select Run Now.

Field	Description
Automatically update Origination Status to Ready to Send?	Select **Yes** or **No**. If you select Yes, the Grant Origination Status is automatically updated from Not Ready to Ready to Send when a valid ISIR is on file and the grant is in an Approved status. This option also updates the Origination Status to Ready to Send if currently Accepted and the award amount increases without prompting the user. The Origination record's current status is a consideration in the status update. The following rules apply: • **N** (Not ready to send) can be updated to **R**. • **E** (Errors/Rejected) can be updated to **R**. • **B** (Batch) indicates it has already been sent and school is awaiting response. It cannot be updated to **R**. • **A** (Accepted) can be updated to **R** only if data in the Origination record has been changed.
Re-Originate Pell when anticipated disbursement dates are updated?	Select **Yes** or **No**. For non-term institutions (Academic Calendars 5 and 6), CampusNexus Student automatically sets the Origination Status of an originated Pell award from "Accepted" or "Batched to Send" to "Ready to Send" when the anticipated disbursement date of a Pell disbursement is updated by the Student Pace Evaluation (SPE) tool. A disbursement date is considered an anticipated disbursement date if the disbursement has not been released to COD. This means the disbursement does not exist in the Disbursements at COD section of the award.

Financial Aid Settings - Hold Codes Tab

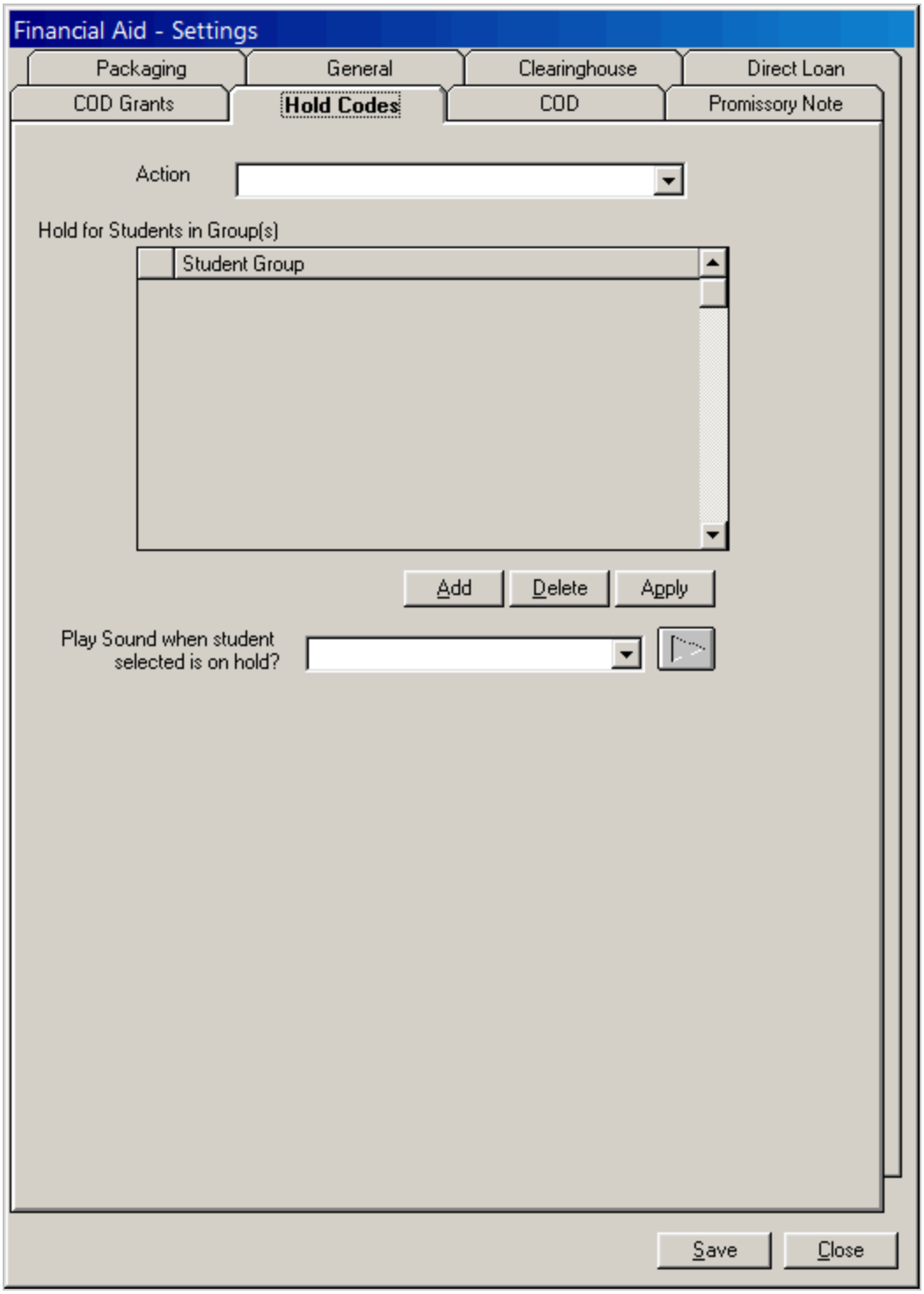
You can associate student groups with financial aid hold codes so that the following events occur while students are members of the designated groups:

- A red light icon is displayed on the CampusNexus Student main toolbar when the Student Master of a student in a hold group is displayed.
- A sound (.wav file) is played.

Note: Create the student groups to which holding actions are related before proceeding with the hold code setup.

To set up hold codes:

1. Navigate to **Setup > Financial Aid**. Select the **Hold Codes** tab.



2. Specify appropriate options. For more information, see Field Descriptions.

3. Click **Save**.
4. Click **Close** to close the form.

Field Descriptions

Field	Description
Action	Select the action to be blocked while a student is a member of the hold group. Hold actions include: • **Schedule Financial Aid**: Financial Aid may not be scheduled for students on hold. • **Disburse Financial Aid**: Financial Aid may not be disbursed for students on hold. • **Servicer SAP Financial Aid**: When a student is in this group, CampusNexus Student causes the flag to be set in the next weekly extract to Global indicating that the student is not making Satisfactory Academic Progress. When the student is removed from the group, the flag sent to Global indicates that the student is making SAP. • **Attendance Violation**: Institutions must have a process that prevents disbursements of financial aid funds to students who violated the institutions attendance policy. To accommodate the institutions that use Global, CampusNexus Studentincorporates the use of a student g Group in tracking students on attendance violation. When the Global Academic Extracts are created, CampusNexus Student flags students as being in violation of attendance if they are a member of this group. **Note**: Institutions must create their own attendance violation policy to evaluate these students. They can create their own stored procedures to evaluate their attendance policy, or add students who are in violation to the student group(s) manually. Whereas CampusNexus Studenttracks and flags the students in attendance violation, institutions must maintain the attendance violation student groups, not CampusNexus Student. When the attendance violation policy evaluation occurs, CampusNexus Student then adds or removes students from this group.
Hold for Students in Group(s)	Associate student groups with hold actions as follows: 1. Click **Add**. A new line appears at the bottom of the Student Group list. 2. Click in the new line and click to select a student group. 3. Select the **student group** to be associated with the hold action. The group is added to the list. Repeat the preceding steps as needed to associate additional student groups with the same FA hold action. 4. Click **Apply** to immediately flag the records of students who belong to the selected groups. Repeat the steps as needed to include other hold actions.

Field	Description
Play Sound when Student Selected is on Hold?	*Optional*. To alert users audibly when they are working with students in financial aid hold groups, select a sound (.wav) file to be played when the student's master record is displayed in CampusNexus Student. Sound files must be stored in the CampusNexus Student shared folder in the sounds subfolder. Sample ".wav" files are included. You can customize your "hold" sounds by placing additional ".wav" files into the CampusNexus Student share/sounds folder. (The sound feature may not be available to institutions using Citrix or terminal servers.) Click **Play** to hear the selected wave file.

Financial Aid Settings - COD Tab

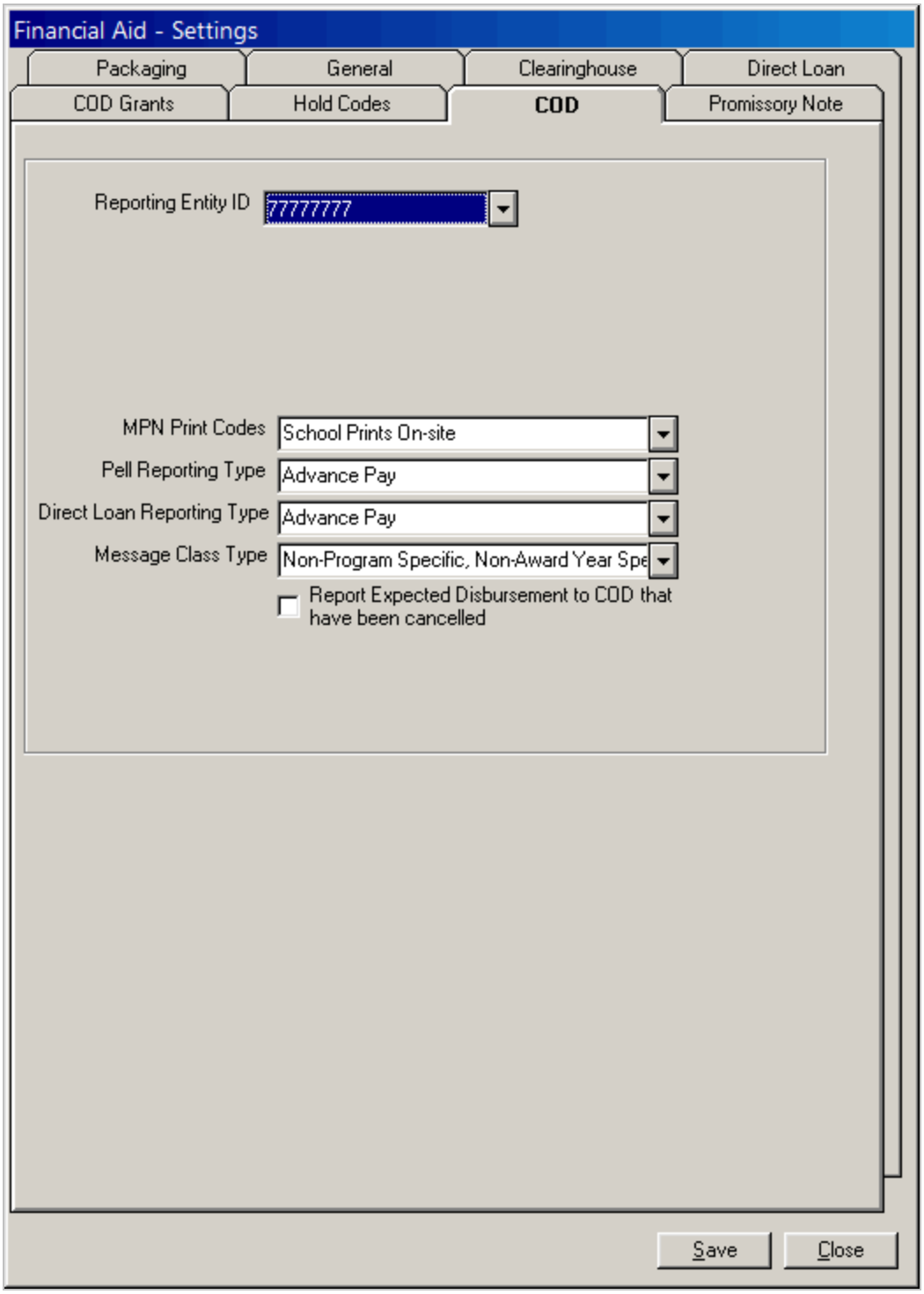
The Common Origination and Disbursement (COD) system was implemented in April 2000 by the Office of Federal Student Aid. All schools receiving Title IV Student Aid must be full participants in this program by the 2005-2006 Award Year. CampusNexus Student supports phase-in participants until that time. The COD tab on the Financial Aid Settings form is used to provide information required by the Common Origination and Disbursement (COD) program.

For more information, see COD Import, COD Export, COD Grants, COD Exceptions and Financial Aid Reports.

Prerequisites: The following steps require that entity ID numbers for Pell and Direct Loan (if applicable) have been set up properly.

To set up COD information for a campus:

1. Navigate to **Setup > Financial Aid**. Select the **COD** tab.



1. Specify appropriate options. For more information, see Field Descriptions.
2. Click **Save**.

3. Click **Close** to close the form.

Field Descriptions

Field	Description
Reporting Entity ID	Select a Reporting Entity ID from the list.
MPN Print Codes	Select one of the Master Promissory Note (MPN) print codes. The options are: • COD Prints and Sends to Borrower • COD Prints and Sends to School • COD Reprints and Sends to Borrower • COD Reprints and Sends to School • School Prints On-site
Pell Reporting Types	Select one of the following options: • Advance Pay • Pushed Cash • Cash Monitoring 1 • Cash Monitoring 2
Direct Loan Reporting Types	Select one of the following options: • Advance Pay • Pushed Cash • Cash Monitoring 1 • Cash Monitoring 2
Message Class Types	Select one of the following options: • Non-Program Specific, Non-Award Year Specific • Non-Program Specific, Award Year Specific • Program Specific, Non-Award Year Specific • Program Specific, Award Year Specific

Financial Aid Settings - Promissory Note Tab

Promissory notes are created for students who establish a student payment plan with a, institution. The note is a financial contract with the institution. The *Standard* Promissory Note is printed for any fund source set up to "Allow Printing of Promissory Note" (see Fund Source for setup instructions).

You may create *Custom* Promissory Note reports if the following conditions are met:

- The report must have been created from a copy of the Standard Promissory Note report.
- The report must use the same view as the Standard Promissory Note. (Do not add or remove fields from the standard view or use a custom view.)
- Changes on your Custom Report only consists of:
    a. Modifying the page layout;
    b. Suppressing (not deleting) certain fields from appearing on the report;
    c. Changing block text printed on the report; or
    d. Changing column heading text or field label text.
- The naming convention for the Crystal report filename is `cst_PN_*.rpt` where the asterisk (*) can be replaced with text of your choice such as `cst_PN_California.rpt`.
- The Crystal report file must be located in your Custom Reports folder (Setup > System - Custom Reports field). Also see Custom Reports.

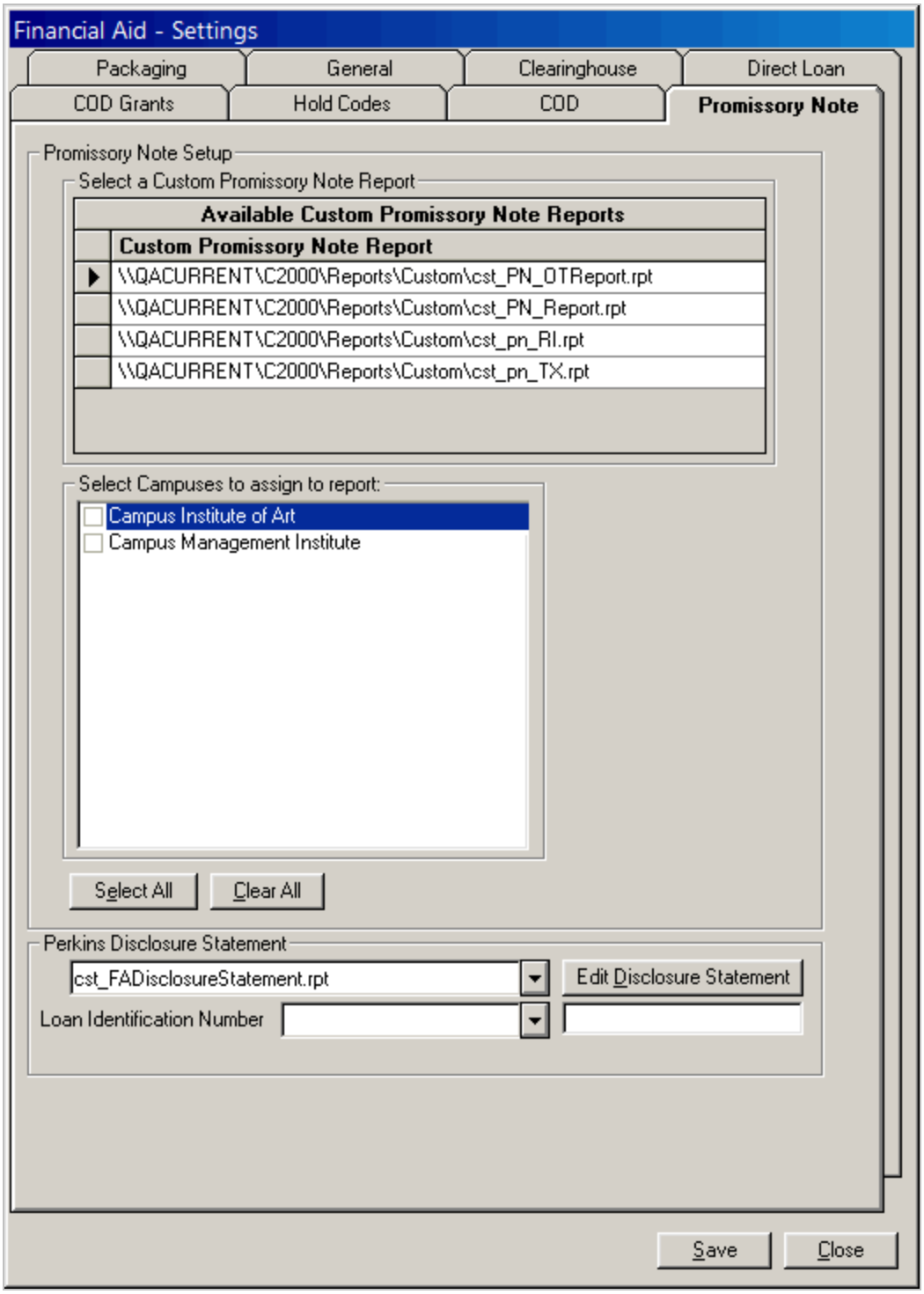
To set up a Promissory Note:

1. Navigate to **Setup > Financial Aid**. Select the **Promissory Note** tab.

    A list of available Custom Promissory Note reports and campuses is displayed allowing you to associate a campus with a Custom Promissory Note report.

    CampusNexus Student assumes that a campus will use the *Standard* Promissory Note report unless a *Custom* Promissory Note report is defined here for the campus.

    An information message is displayed upon clicking on the Promissory Note tab if you have not established a location for Custom Reports and subsequently no reports are displayed, otherwise a list of reports is displayed.



2. Select a Promissory Note Report from the **Available Promissory Note Reports** list. Once a campus is selected for a promissory note, it will not appear in the list because there can be only one promissory note assigned to any one campus.
3. A list of campuses appears under **Select Campuses to assign to report**. Select the campuses that you want to associate with the selected promissory note reports.
4. Select a **Perkins Disclosure Statement**.

5. If the disclosure statement needs to be edited, click **Edit Disclosure Statement**.
6. Select a **Loan Identification Number**. The options are:
    - SSN
    - Loan Identification Format
    - Student Number
    - Student ID
7. Click **Save**.
8. Click **Close** to close the form.

Fund Source Permissions

The Fund Source Permissions options allow staff members gain access to fund sources to post, add, edit, delete, and approve awards. To limit the users who can approve or post aid from certain fund sources, those users must first be isolated in a discrete staff group that can be selected from the drop-down menu.

Fund Source Security accommodates Financial Aid related activities that occur in Student Accounts. Distinct permissions can be set up for user access to create and process awards, create and process refunds, create and process stipends, and edit payees for particular fund sources. These types of security limitations may be required by an organization's internal compliance department or through implementing the separation of duties mandated by the Sarbanes-Oxley Act (SOX). This provides fund source level security for awards, refunds, stipends, and payments.

The following staff group permissions to perform one or more of the following actions for particular fund sources are available:

- *Award*: Add, Edit, Delete, Approve, View
- *Payment*: Post, Edit, Delete, Void
- *Schedule Refund/Stipend*: Schedule, Edit, Delete
- *Paid Refund/Stipend*: Post, Edit, Delete/Void
- *Schedule Refund*: Schedule, Edit, Edit Payee, Delete
- *Paid Refunds*: Post, Edit, Delete, Void
- *Schedule Stipends*: Schedule, Edit, Edit Payee, Delete
- *Paid Stipend*: Post, Edit, Delete, Void

Note: A staff member cannot perform any action for a fund source transaction unless the staff group to which the staff member belongs has been granted permissions for that action for the fund source.

To configure fund source permissions:

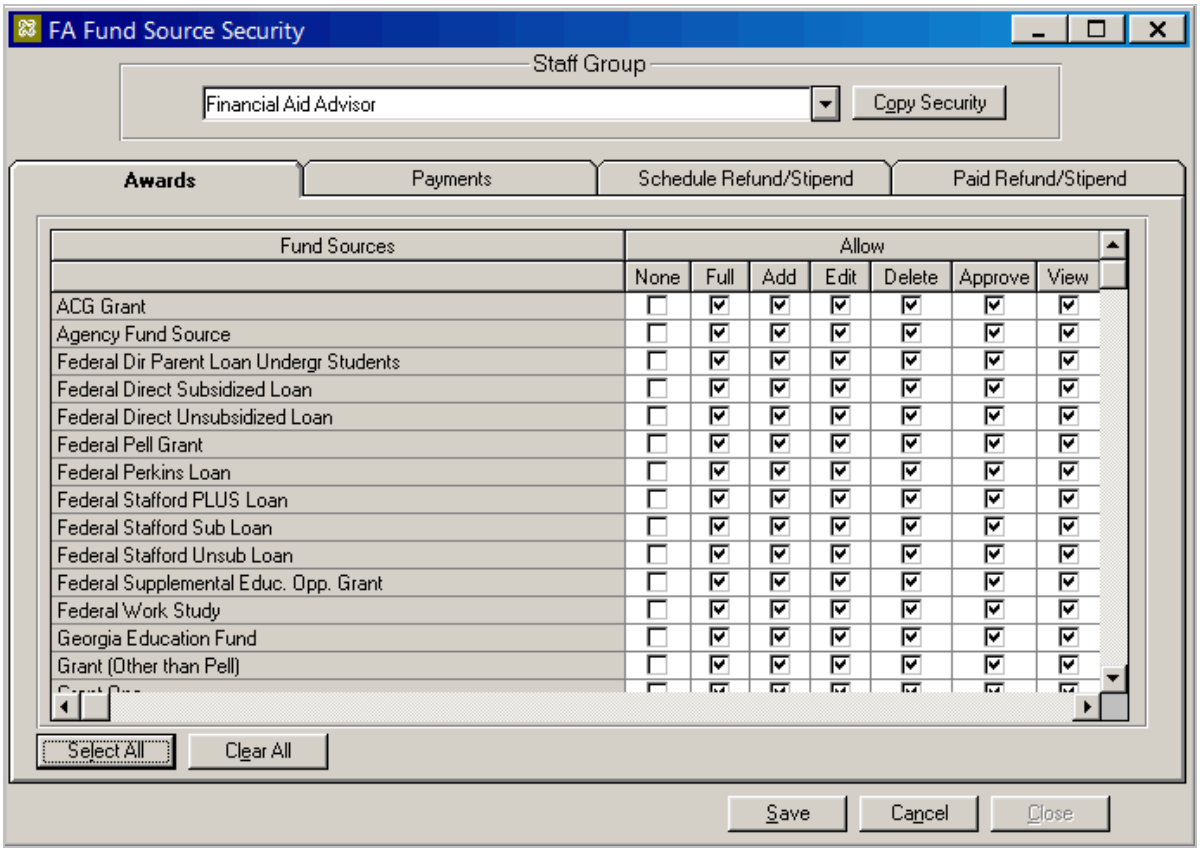
1. Navigate to **Setup > Financial Aid**. Select the **General** (tab).
2. In the Fund Source Security section, next to *Designate Access by Fund Source?*, select **Yes**. The *Simple* and *Advanced* options are enabled.
3. Select **Simple** or **Advanced** according to your institution's needs for FA fund source security. The *Advanced* option provides more granular configuration options.

   Simple/Advanced Configuration Options

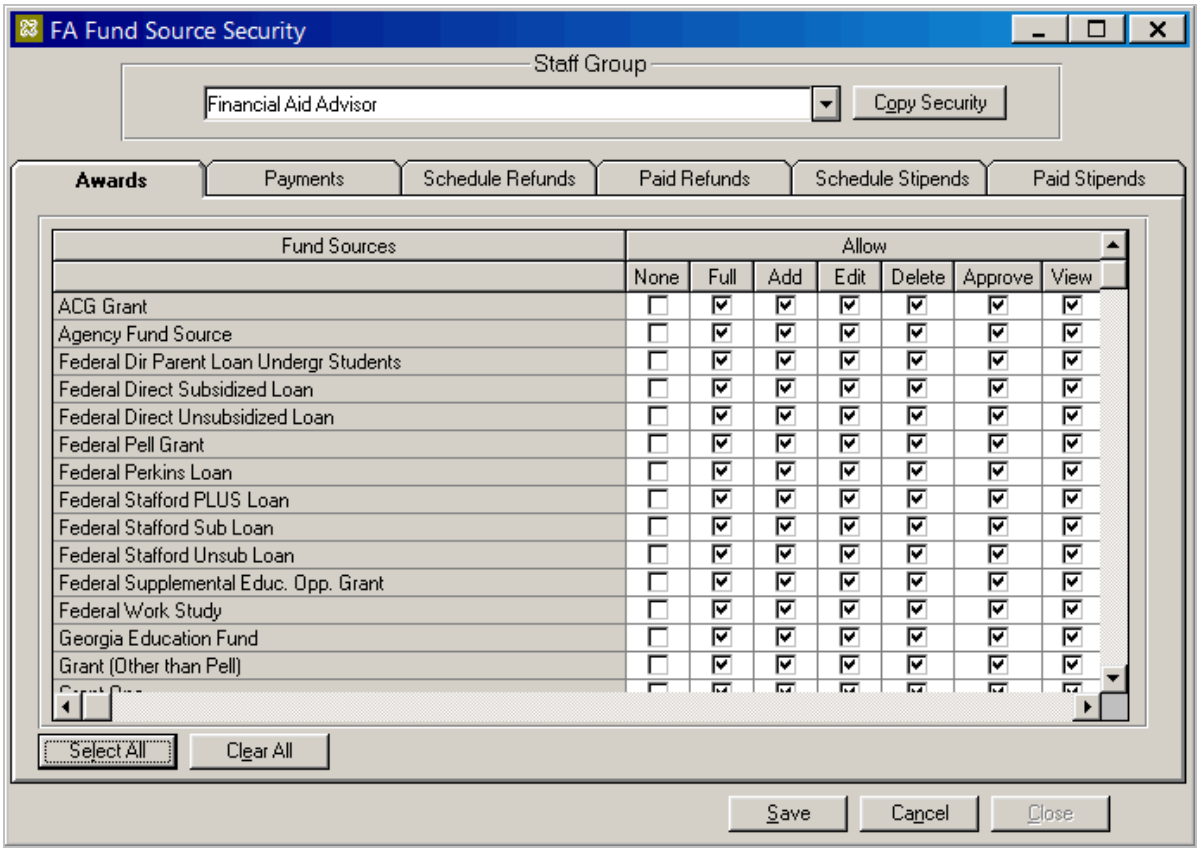
Configuration	Tabs					
Simple	Awards	Payments	Schedule Refund/Stipend		Paid Refund/Stipend	
Advanced	Awards	Payments	Schedule Refunds	Schedule Stipends	Paid Refunds	Paid Stipends

4. Click **Fund Source Permissions**. The FA Fund Source Security form is displayed. The tabs on the form are determined by your selection of *Simple* or *Advanced* in the previous step.

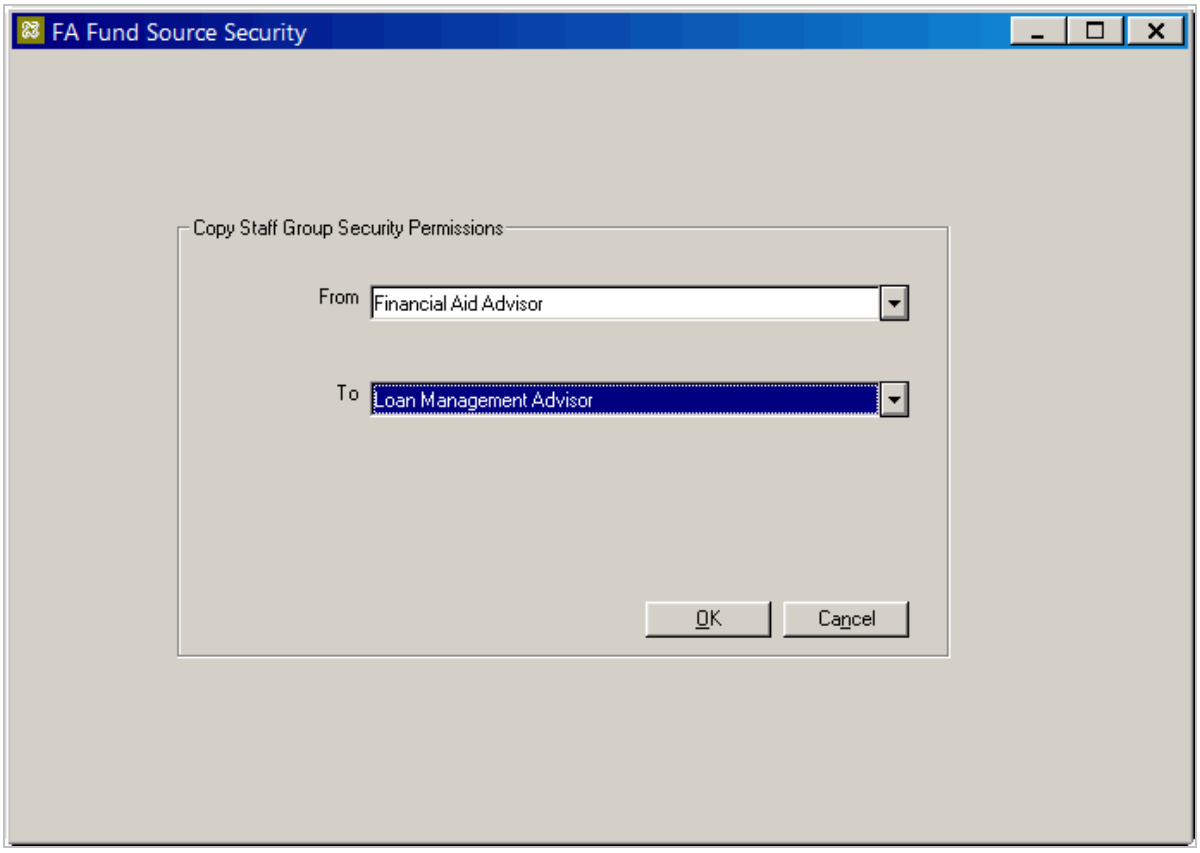
Simple


FA Fund Source Security
Staff Group
Financial Aid Advisor
Copy Security
Awards
Payments
Schedule Refund/Stipend
Paid Refund/Stipend
Fund Sources
Allow
None
Full
Add
Edit
Delete
Approve
View
ACG Grant
Agency Fund Source
Federal Dir Parent Loan Undergr Students
Federal Direct Subsidized Loan
Federal Direct Unsubsidized Loan
Federal Pell Grant
Federal Perkins Loan
Federal Stafford PLUS Loan
Federal Stafford Sub Loan
Federal Stafford Unsub Loan
Federal Supplemental Educ. Opp. Grant
Federal Work Study
Georgia Education Fund
Grant (Other than Pell)
Select All
Clear All
Save
Cancel
Close

Advanced



5. Select a **Staff Group**. This is the staff group you will be working with until you click **Save**.
6. Select appropriate security permissions for *each fund source* as they pertain to the staff group.
    - Select **None** to deny permissions.
    - Select **Full** to assign full permissions.
    - Select fields in the **Add**, **Edit**, **Delete**, **Approve**, and **View** columns to assign specific permissions.
7. Click **Select All** to select all fund sources listed.
8. Click **Clear All** to clear all the fund sources listed.
9. Click**Copy Security** to copy permissions from one staff group to another.
    a. Select the staff group who already has permissions from the **From** list, and then select the staff group from the **To** list that should have the same permissions.



b. Click **OK**.

c. A confirmation message is displayed. Click **Yes**.

10. Click **Save**.
11. Click **Close** to close the form.

Notifications of Receipt

By law, a student must be notified each time a financial aid disbursement is received by the institution on the student's behalf and credited to the student's account. CampusNexus Student can print notifications of receipt for each type of financial aid received. The receipt text varies depending on the type of funding.

Each fund source can have its own formatted receipt. Each receipt is created as a Crystal report. You can customize the layout of each of the receipts. **Your must have access to the Crystal Reports program to edit Receipt Notifications**.

The Notification of Receipt can be edited on the Fund Source Setup form and on the Financial Aid Settings form.

To edit notifications of receipt from the Financial Aid Settings form:

1. Navigate to **Setup > Financial Aid**. Select the **Packaging** tab.
2. Click **Edit Receipt Notification Report**. CampusNexus Student opens Crystal Reports.
3. Work in Crystal Reports to format the report(s) as required. See the discussion below for more details about the notifications of receipt and data that is available to be used in the reports.
4. Save your work and return to CampusNexus Student.

   Student data items available to be displayed on the receipt include the following:

   - Today's Date
   - Student name - SyStudent.Firstname + SyStudent.Lastname
   - Student's address - SyStudent.Addr1
   - Student's city - SyStudent.City
   - Student's state - SyStudent.State
   - Student's ZIP - SyStudent.Zip
   - Student's Phone number - SyStudent.Phone
   - Student's SSN - SyStudent.Ssn
   - Student's Enrollment Number - AdEnroll.StuNum
   - Student Number - SyStudent.Stunum
   - Student's Program Version description - AdProgramversion.Descrip
   - Student's Enrollment Current Account Balance - AdEnroll.ArBalance
   - Student's Overall Current Account Balance - SyStudent.ArBalance
   - Student's Campus Name - SyCampus.Descrip
   - Student's Campus Phone number(s) - SyCampus.Phone1, SyCampus.Phone2, SyCampus.Phone3

   Transaction-related data items available to be displayed on the receipt include the following:

   - Lender name - FaLender.Descrip
   - Lender address - FaLender.Addr1
   - Lender phone number(s) - FaLender.Phone, FaLender.Phone2
   - Lender fax number - FaLender.FaxNumber
   - Lender contact(s) - FaLender.Contact1Name, FaLender.Contact2Name
   - Fund source description - FaFundSource.Descrip
   - Fund source receipt notification comments - FaFundSource.ReceiptComment
   - Award year - FaStudentAid.AwardYear
   - Disbursement amount - SaTrans.Amount
   - Transaction date of disbursement - SaTrans.Date
   - Disbursement Check/EFT number - SaTrans.Checkno
   - Transaction reference - SaTrans.Ref
   - Transaction description - SaTrans.Descrip

- Transaction receipt number - SaTrans.ReceiptNo
- Term code disbursement was for - AdTerm.Code (Join AdTerm on SaTrans.AdTermID)

All of the above listed data items may not be included on each defined receipt. They are available to drop onto the report. In addition, you can specify any amount of free text on the receipt.

A column for Receipt Comment Text was added to the FA Fund Source table. Columns for Refund Letter Code and Receipt Letter Code were removed from this table. A column was to the FA Disbursements table for Date Receipt Printed.

Default Notification of Receipt

A default "Notification of Receipt" report is used as the default Notification of Receipt for each fund source unless you modify the layout for that fund source. The default layout is as follows:

Today's Date

School Name School Phone #

Student's Name
Student's Address 1
Student's Address 2
Student's City, State, and ZIP
Student's Phone #

Current Account Balance: $######.##

Fund Source: nnnnnnnnnnnnnnnnnnnn Award Year: ####-##
Disbursement Amount: ####.##
Disbursement Date: 99/99/9999
Check Number: nnnnnnnnn
Receipt Number: nnnnnnnnnnnnnn

Fund Source Receipt comments

This default receipt is named `lst_FaDefaultReceipt`. If the default receipt report is customized, it is saved as `cst_FaDefaultReceipt`. When a receipt is customized for a fund source, the resulting report name is `cst_Fannnnnnnn Receipt`, where `nnnnnnnn` is the fund source code.

Lists > Financial Aid > Fund Sources

Use the **Edit Receipt Notification** button on the FA Fund Source form to edit the Notification of Receipt layout for each fund source in Crystal Reports. CampusNexus Student first checks if a report exists for the selected fund source.

- If a report exists for the fund source (`cst_Fannnnnnnn Receipt`), that report is loaded.
- If a report does not exist for the fund source, the default receipt (`lst_FaDefaultReceipt`) is copied to `cst_Fannnnnnnn Receipt`.

  The `cst_Fannnnnnnn Receipt` is then loaded for editing.

View > Student Accounts > Ledger Cards

Use the **Print Receipt** button on the Student Accounts Ledger to print the Notification of Receipt for any FA disbursement received. This option generates a generic receipt for the currently selected transaction on the ledger card. If the selected transaction on the ledger card is an FA disbursement received, and the FA fund source type is not CASH, the corresponding Notification of Receipt is printed. To determine which Notification of Receipt report should be loaded when this option is selected, CampusNexus Student first checks for the existence of a receipt report for the fund source received.

- If `cst_Fannnnnnnn Receipt` exists (*nnnnnnnn* = Fund Source code), that report is loaded.
- If `cst_Fannnnnnnn Receipt` does not exist, CampusNexus Student looks for `cst_FaDefaultReceipt`. If it does not exist, `lst_FaDefaultReceipt` is loaded.

After the receipt is printed for the selected transaction, CampusNexus Student updates FaDisb.DateReceiptPrinted with the system date.

Note: A Date Receipt Printed property was added to payments on the student's ledger transactions. The date is populated when a receipt is printed. This date is also updated when the student views a receipt from Portal. Only the first receipt printed is recorded.

Daily > Student Accounts > Post FA Disbursements

The Student Accounts Post FA Disbursements form prints a Notification of Receipt for each FA disbursement received in the posted batch. The logic to determine which receipt report to use is the same as explained above. It is possible that a posted batch of FA disbursements includes disbursements for more than one fund source. This means that it is possible that more than one receipt report needs to be used when generating these receipts. The option to print the receipts is available after clicking Save to post the batch. A dialog box is displayed with the following text: "*Print receipt notifications for disbursements just posted?*"

Daily > Student Accounts > Post Payments

The Student Accounts Post Payments form prints a Notification of Receipt for any posted FA disbursement. You can print a receipt notification after clicking Save. If the payment posted was not a scheduled payment or the fund source type is CASH, a standard receipt will be printed. (The receipt notification is not printed.)

Setup > Student Accounts

When you navigate to Setup > Student Accounts, the Student Accounts Settings form is displayed. Use this form to set up options related to student account transaction activities. The form contains the following tabs:

- General
- Revenue
- Additional
- Hold Code
- Housing

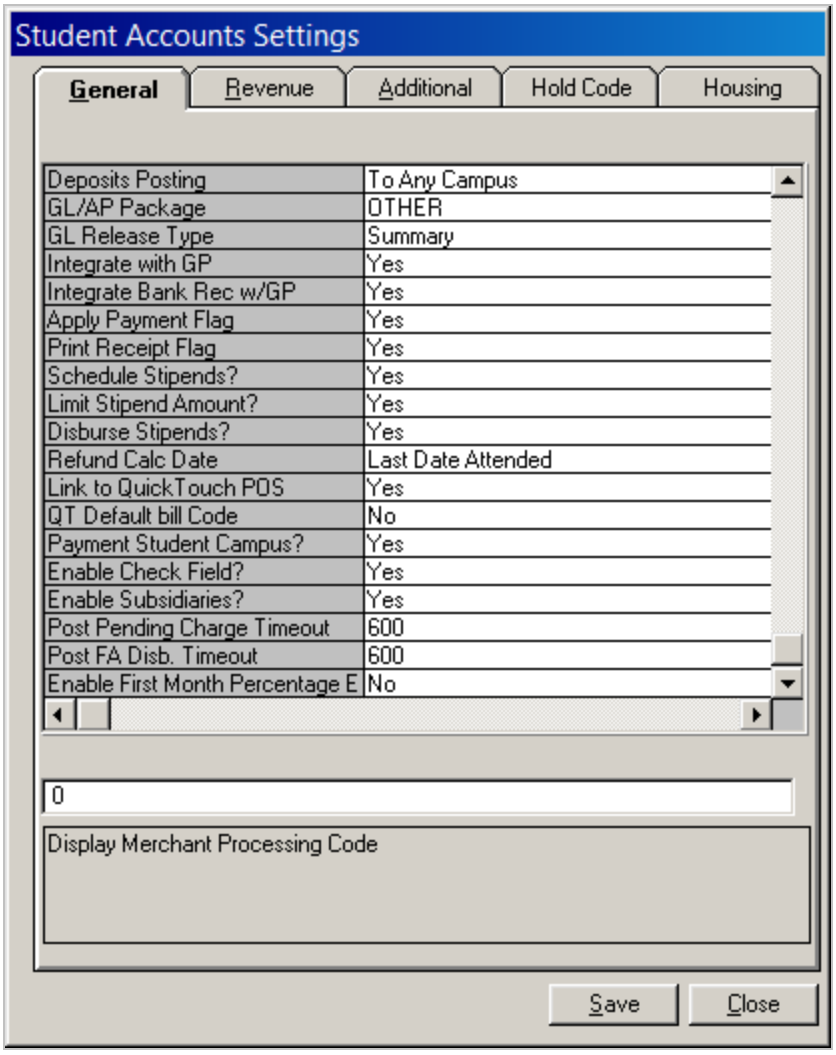
Additional settings are configured under Lists > Student Accounts.

Student Accounts Settings - General Tab

Use the General tab on the Student Accounts Settings form to set up general options related to student account transactions.

To set up general options for student accounts:

1. Navigate to **Setup > Student Accounts**. Select the **General** tab.



2. The fields on the General tab vary depending on the selected options. A choice must be made for each setting displayed. See Field Descriptions.

   If your campuses use Great Plains, see Settings for Great Plains.

3. Click **Save**.
4. Click **Close** to close the form.

Field Descriptions

Field	Description
Display Merchant Process	Display Merchant Processing Code
Edit Enrollment Fees	Allow the user to edit the tuition, books, fees, etc. when the enrollment record is added? Yes/No
Earnings Method	Select the method to be used for earning tuition, e.g., Monthly.
Require Term Codes	Require terms to be entered when posting charges and adjustments? Yes/No This option applies system-wide to all charges/adjustments. When posting certain transactions, a term code may not be relevant. For example, a "write-off" adjustment would write off a student's overall balance, regardless of the terms in which the balance was incurred. Previously, the system only allowed a transaction to be posted as an adjustment to charges up to the amount of those charges incurred for the term. For instance, if $5000 were charged in Term A, the system would not allow more than a $5000 credit. If a write-off exceeded this amount, and a term code was required, you would have to make several entries to accomplish the write-off. The Required Term Code Override allows an override on each transaction code. A school that requires term codes would want the rule to be enforced when posting a tuition credit, but may not want the rule enforced when posting a write-off. In this example, you would override the "required term flag" for the write-off transaction code. See Lists > Student Accounts > Transaction Codes . Transaction codes have a flag to "Override Required Term Code?" under the "Include in Title IV Inst. Charges" option. This option is enabled only if you selected Require Term Codes.
Delete Charges/Drop	Delete charges dated after drop date when dropping a student? Yes/No
Delete Charges/No Show	Delete charges from ledger card when student status set to No Show or Cancel? Yes/No
Revenue Ref #	Enter a number to be used as a reference with revenue recognition transactions. Once a month someone will run a revenue recognition calculation that creates general ledger transactions. This number will be incremented each month and assigned to the transactions.
G/L Format	Enter the format of your general ledger (G/L) account numbers. Use # to represent digits and insert hyphens as required to separate segments of the number. The maximum length for the G/L account number is 30 characters including digits and punctuation. The GL Company Number set up under Setup > Campus Locations is added to the beginning of this format by CampusNexus Student. This field is not displayed if CampusVue Finance, HR & Payroll is installed.
G/L Batch #	Enter a number to be incremented for each new general ledger (G/L) batch. This field is not displayed if CampusVue Finance, HR & Payroll is installed.

Field	Description
Allow Posting	Allow Posting of Student Ledger Card Transactions. The options are: • To Any Campus • To Current (Signed-in) Campus
Deposits Posting	Allow Posting of Admissions Deposits. The options are: • To Any Campus • To Current (Signed-in) Campus
GL/AP Package	Select the accounting package that is used in conjunction with CampusNexus Student. The options are: • Great Plains • Other • CampusNexus Finance (See Initial Configuration of CampusNexus Finance, HR & Payroll.) This field is not displayed if CampusVue Finance, HR & Payroll is installed.
GL Release Type	Select the type of transaction that is to be delivered to the accounting package. • Detail • Summary This field is not displayed if CampusVue Finance, HR & Payroll is installed.
Integrate with GP	Does your CampusNexus Student system share data with Great Plains, i.e., will CampusNexus Student validate GP account numbers, pass transactions to GP, get data from GP for CampusNexus Student reports, and so on? N/A, Yes, or No. Choose N/A if Great Plains is not installed. This field is not displayed if CampusVue Finance, HR & Payroll is installed.
Integrate Checks with GP	Does your CampusNexus Student system share data with Great Plains for printing accounts payable checks? N/A, Yes, or No. This field is not displayed if CampusVue Finance, HR & Payroll is installed.
Integrate Bank Reconciliation with GP	Are the refund and stipend checks printed in CampusNexus Student integrated into the Great Plains process for bank reconciliation? N/A, Yes, or No. If you select Yes, the Process Refunds/Stipends Checks form will include GP Checkbook and GP Check# columns. This field is not displayed if CampusVue Finance, HR & Payroll is installed.
Apply Payment Flag	Should CampusNexus Student apply a payment to outstanding charges? Yes/No • If you choose Yes, you can elect to not apply a payment at the time of the transaction. • If you choose No, you can elect to apply a payment at the time of the transaction.

Field	Description
Print Receipt Flag	Should CampusNexus Student print a receipt for payments received? Yes/No Select Yes to print a receipt by default. You can override the default at the time of the payment transaction. The receipt format for a receipt printed as a result of a transaction is: yy-ddd-nnnn. • yy – designates the current year, • ddd – designates the Julian date, • nnnn – represents the unique transaction number for the current day. For example, the first three transactions for today produce receipts numbered 03-295-0001, 03-295-0002, 03-295-0003.
Limit Stipend Amount?	Prevent Stipend amount scheduled from exceeding amount packaged for specified fund source? Yes/No The default is Yes, meaning that stipend disbursements are limited to the amount packaged. Select No if your institution wishes to schedule stipends without adhering to the business rules that require the net amount of stipends scheduled to be less than or equal to the amount packaged or the amount received for a fund source.
Schedule Stipends?	Prevent scheduling of stipends when institutional charges are greater than amount packaged? Yes/No You can allow stipends to be scheduled whether the institutional charges exceed the amount packaged. The default is Yes.
Disburse Stipends?	Prevent the issuing of stipend disbursements when funding has not been received? Yes/No. You can allow stipends to be posted and issued to the student before the funding is received on the ledger card. The default is Yes.
Refund Calc Date	Which date should be used as the effective date when calculating refunds? The options are: • Drop Date • Last Date Attended.
Link to QuickTouch POS	Link CampusNexus Student with the QuickTouch POS System? Yes/No
QT Default Bill Code	Assign default billing code to imported QuickTouch transactions that have no billing code specified? Yes/No
Payment Student Campus?	Associate payments with student's enrollment Campus regardless of where payment is made? Yes/No
Enable Check Field	Enable check field on adjustments for refunds? Yes/No
Enable Subsidiaries	Enable Subsidiaries? Yes/No Subsidiary ledgers are used to bill services not reflected in the student ledger card, for example, housing, meal plans, parking fees, etc.

Field	Description
Post Pending Charge Timeout	Number of seconds to wait for the post pending charges process.
Post FA Disb. Timeout	Number of seconds to wait for the post FA disbursements process.
Enable First Month Percentage	Earn a percentage of the total tuition charge in the first month of earning.
Max GP GL Account Search	This field is enabled only when Great Plains is selected in the GL/AP Package field. Use this field to specify the maximum number of records displayed in the search results page.
PayPal Credit Card Batch Timeout	Number of seconds to wait for the credit card batch process.

Settings for Great Plains

If your campuses use Great Plains, you must enable the following settings to use the Great Plains General Ledger Account search feature.

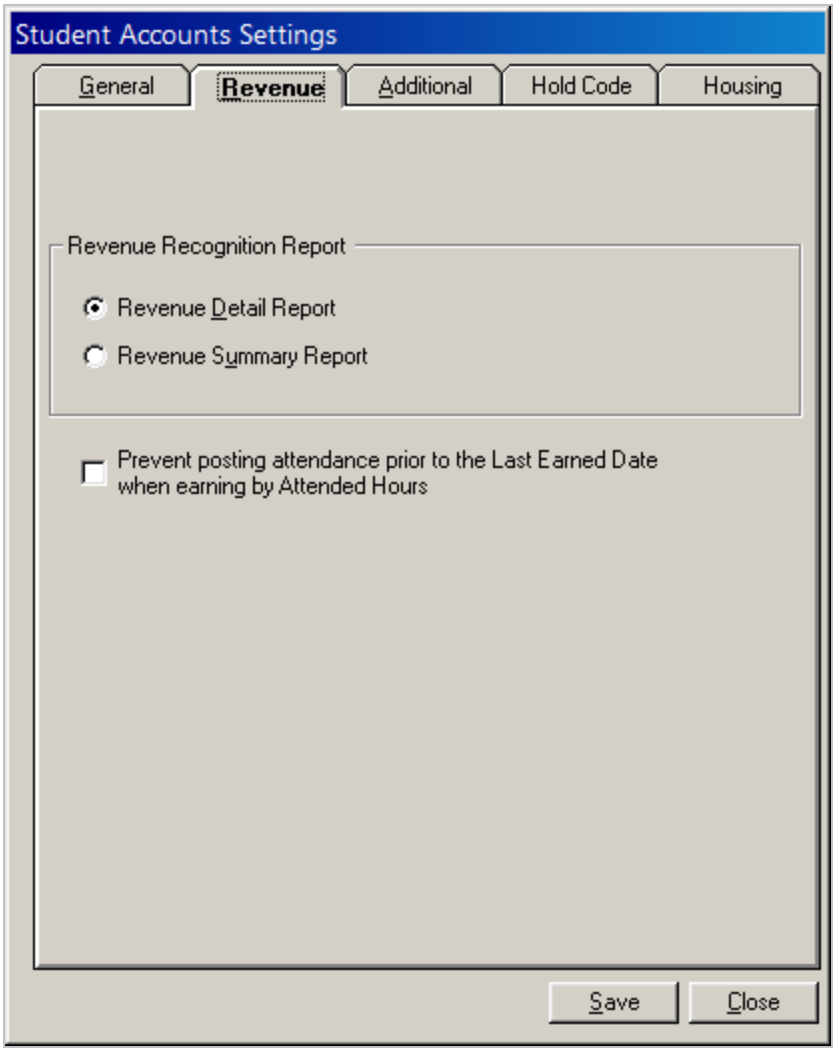
- On the Student Accounts > General tab (see above):
  - Set the **GL/AP Package** to GREAT PLAINS.
  - Set **Integrate with GP** to Yes.
  - Set **Integrate Bank Rec w/GP** to Yes if you want the Bank Reconciliation portion to be turned on; otherwise set it to No.
  - Set **Map GP GL Account Search** to any positive number from 1 to 50,000. This field specifies the number of records that the search results display in a page. The default number is 500.
- On the Accounting tab under Setup > Campus Locations > Add/Edit (button):
  - Set **GL System to Great Plains**.
  - Specify the connect string for the **Great Plains Dynamics DB**.
  - Specify the connect string for the **Great Plains Company DB**.
  - Specify a **Batch ID**. It is usually non-numeric, but it can be numeric. For example, if the Batch ID is set to "Austin", every batch starts with "Austin".

Student Accounts Settings - Revenue Tab

Use the Revenue tab of the Student Accounts Settings form to select the detailed or summary version of the Revenue Recognition Report and to enable or disable the posting of attendance before the Last Earned Date.

To set up the revenue options for student accounts:

1. Navigate to **Setup > Student Accounts**. Select the **Revenue** tab.



2. Select the Revenue report you want to have printed when the revenue calculation is performed (Daily > Student Accounts > Revenue Recognition). The options are **Revenue Detail Report** (default) and **Revenue Summary Report**.
3. Use the **Prevent posting attendance prior to the Last Earned Date when earning by Attended Hours** option for students enrolled in a "Earn by attended hours Program Version". This system-level configuration allows posting/editing to be turned on and off for "Earn by Attended Hours Program Versions". Select this option to restrict the posting/editing of attendance to dates prior to or equal to the Last Earned Date.

The default configuration is to allow posting of attendance for all dates for all Program Versions (check box cleared).

4. Click **Save**.
5. Click **Close** to close the form.

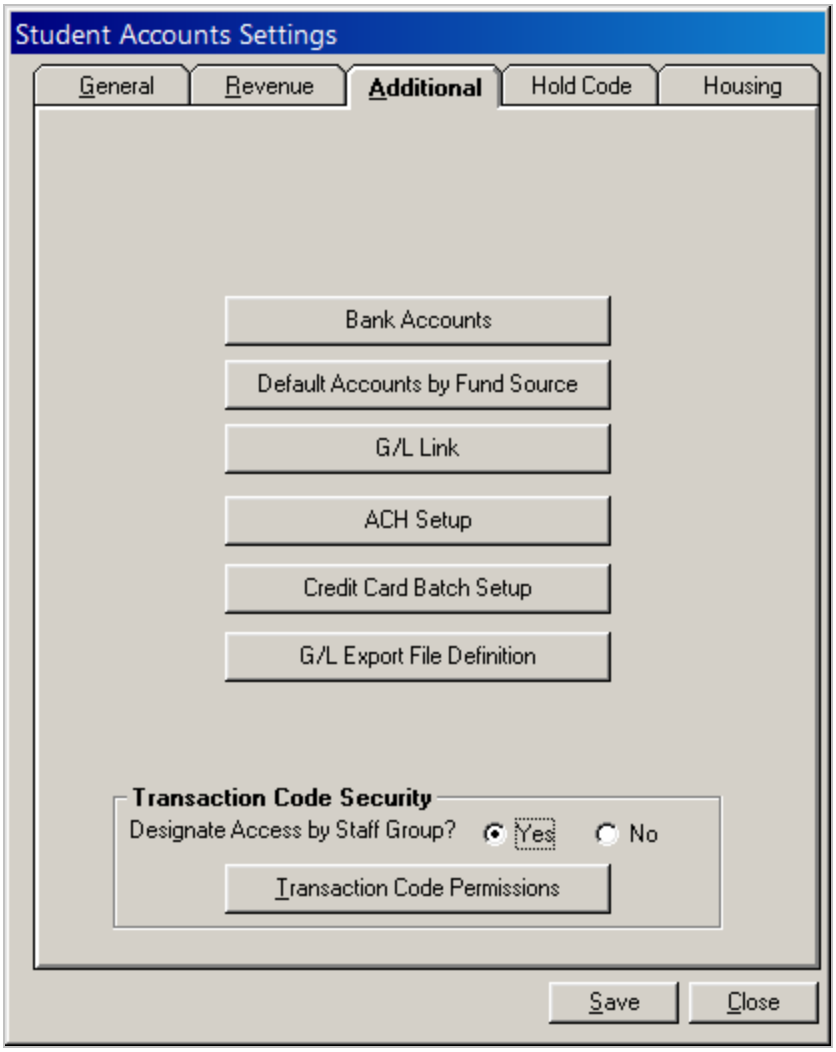
Student Accounts Settings - Additional Tab

Use the Additional tab on the Student Accounts Settings form to set up policies for the processing of funds for student accounts.

Note: If CampusVue Finance, HR & Payroll is installed, navigate to **Setup > CampusVue Finance > CampusNexus Student Journal Entry Group** to access the Journal Entry Group Setup form. Use this form to set up journal entry groups and associate them with CampusVue Finance, HR & Payroll Fiscal Year/Ledger combinations and Campus Groups.

To set up additional features for student accounts:

1. Navigate to **Setup > Student Accounts**. Select the **Additional** tab.



2. Click **Bank Accounts** to select the default bank accounts for each campus. These are the accounts to be used when bank deposits are processed. For more information, see Bank Accounts.
3. Click **Default Accounts by Fund Source** to select default bank accounts for various fund sources and payment types (cash, check, credit card, etc.) for the associated campuses. For more information, see Bank Accounts and Default Bank Accounts.
4. Click **G/L Link** to set up basic accounting relationships between CampusNexus Student and your general ledger

system. For more information, see GL Link.

Also see Initial Configuration of CampusNexus Finance, HR & Payroll.

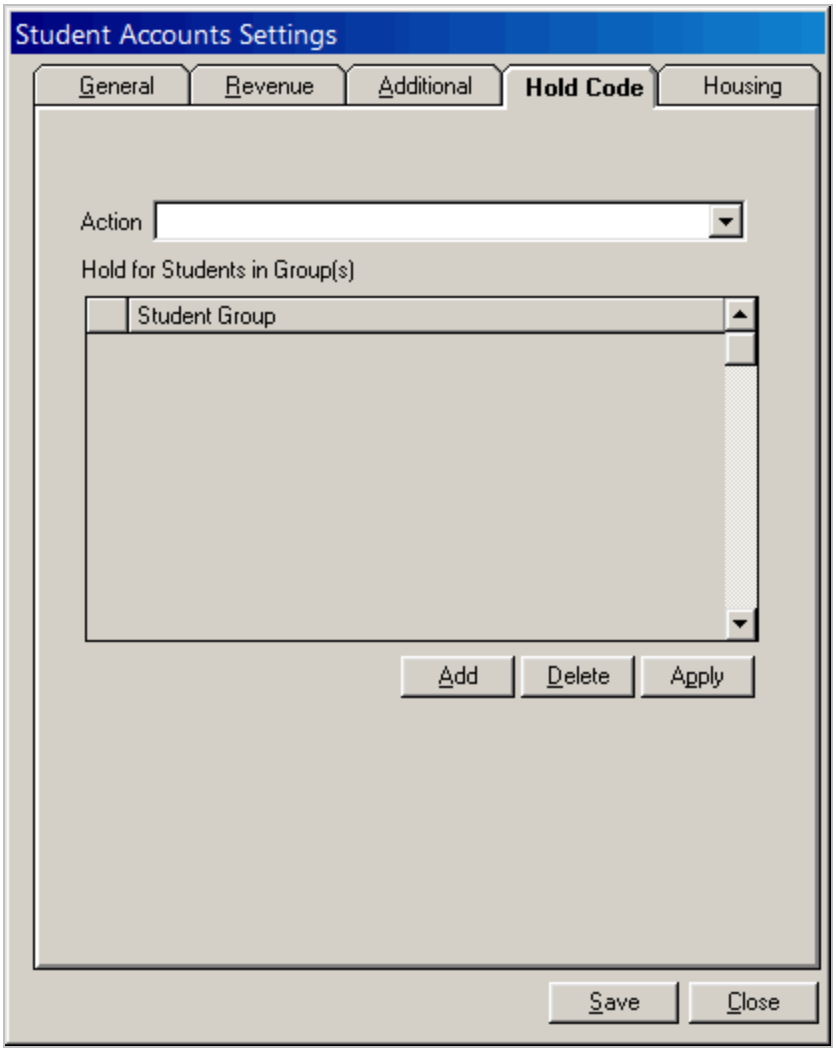
5. Click **ACH Setup** to set up Automated Clearing House (ACH) processing for your institution. For more information, see ACH Setup.
6. Click **Credit Card Batch Setup** to specify the description and code related to the credit card processor (e.g., VeriSign) and the configuration destination for batch files. For more information, see Credit Card Batch Setup .
7. Click **G/L Export File Definition** to configure the layout of a flat file that can be produced within the Release to General Ledger option in CampusNexus Student. You can define that flat file according to the specific needs of your institution's G/L package. For more information, see G/L Export File Definition.
8. In the Transaction Code Security section, select **Yes** to allow posting of transactions based on a staff member's transaction code security level, The **Transaction Code Permissions** button is enabled. For more information, see Transaction Code Security.

Student Accounts Settings - Hold Code Tab

Hold codes represent specific reasons why a student could be put on hold. A student could be put on ACH hold for an NSF payment, or some other reason. A student could be put on CC hold for an expired, or otherwise invalid credit card.

To set up hold for student accounts:

1. Navigate to **Setup > Student Accounts**. Select the **> Hold Codes** tab.



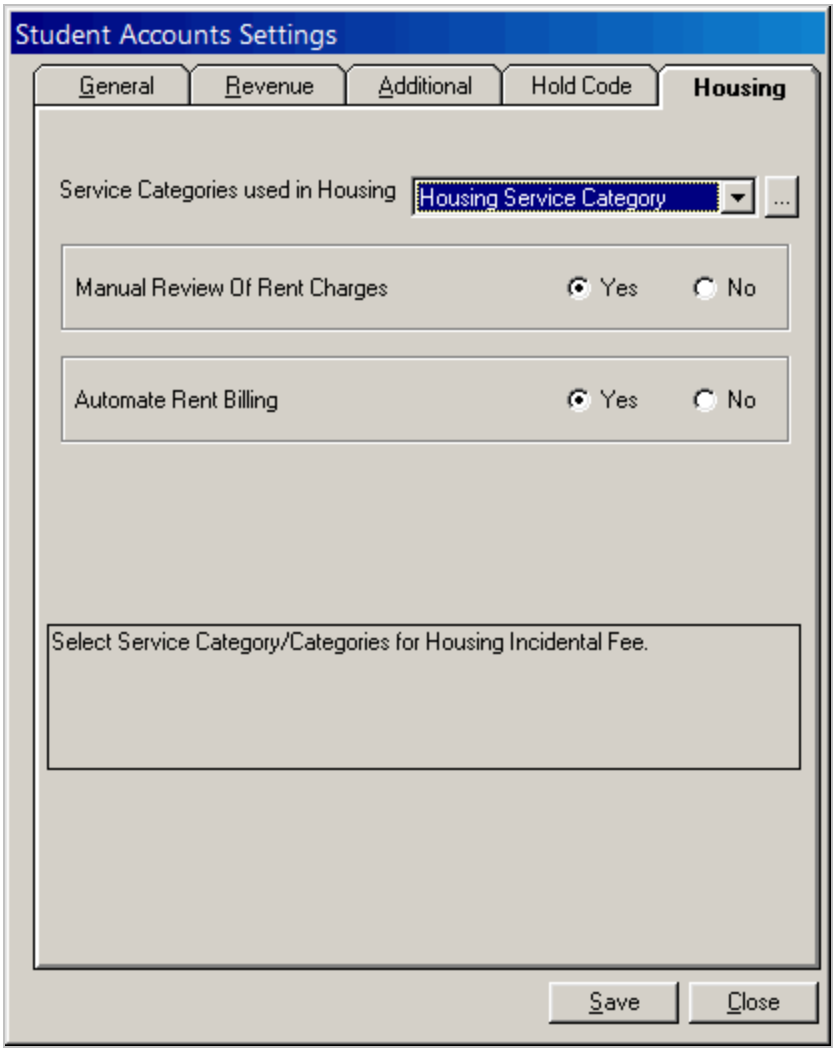
2. Select an **Action**. The options are **ACH Hold**and **CC Hold** (Credit Card Hold).
3. Click **Add** to select a Student Group to associate with the Action. A blank line appears in the Student Group grid.
4. Click in the blank line and click to select a student group.
5. Click **Apply**.
6. Click **Save**.
7. Click **Close** to close the form.

Student Accounts Settings - Housing Tab

The Housing tab on the Student Accounts Settings form contains option that enable users manage housing transactions pertaining to deposits, application fees, and rent charges.

To set up housing options for student accounts:

1. Navigate to **Setup > Student Accounts**. Select the **Housing** tab.



2. Select the appropriate values for the following fields:

   - Service Categories used in Housing

     Select the service categories available to Housing module users that will allow them to post incidental charges.

     Note: Service Categories listed in the Students Accounts Settings form are defined under Lists > Student Services > Services Categories.

- Manual Review Of Rent Charges

  Select **No** to post rent charges directly to the student ledger. Select **Yes** to set the rent charges pending for a manual review at a later date.

- Automate Rent Billing

  Select **Yes** to configure the system automate the rent billing process. Select **No** to enable manual billing of rent charges based on lease and charge schedule dates.

3. Click **Save**.
4. Click **Close** to close the form.

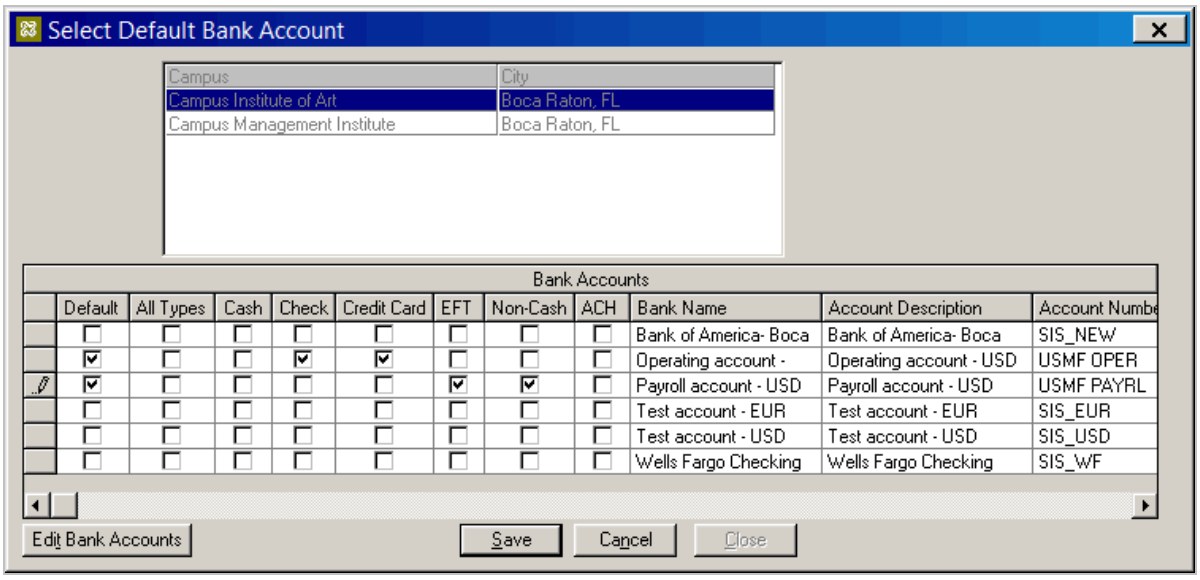
Bank Accounts and Default Bank Accounts

The Bank Accounts forms enable users with the appropriate permissions to set up bank accounts. Once a bank account is set up, the user can designate accounts as default bank accounts for various fund sources and payment types (cash, check, credit card, etc.).

When bank accounts are set up, staff can post payments using a specific fund source code or payment type, and have the bank account field populate automatically. This security feature prevents users from posting funds accounts set up to for other purposes.

To set up or edit a bank account:

1. Navigate to **Setup > Student Accounts**. Select the **Additional** tab.
2. Click **Bank Accounts**. The Select Default Bank Account form is displayed. The top part of the form lists all campuses associated with your institution. When you select a campus, the bottom part of the form displays the bank accounts associated with the selected campus.



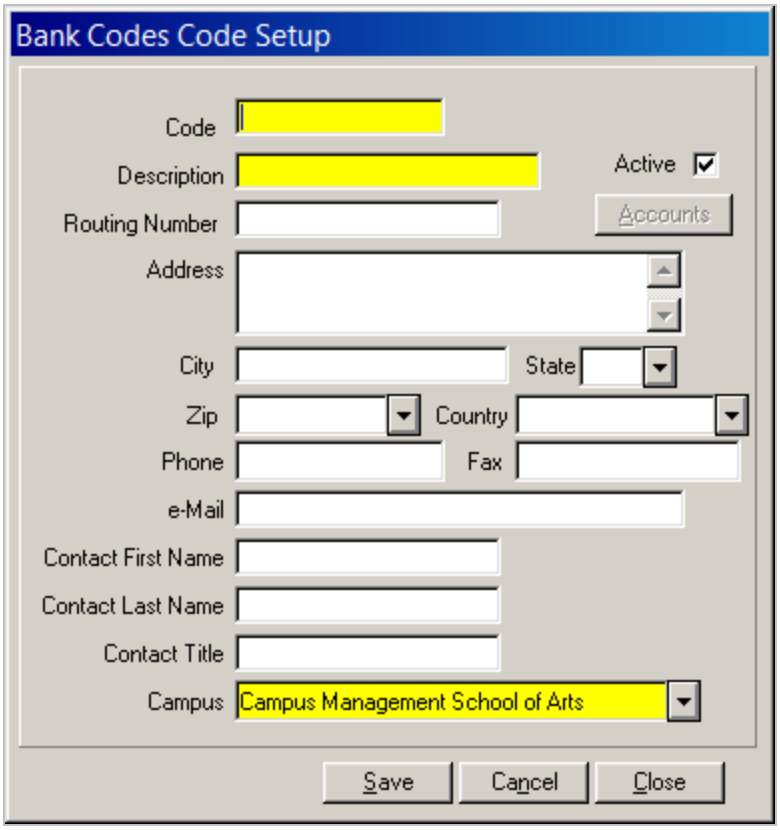
3. To set an account as a default bank account for a payment type, select the **Default** check box to indicate that the account is to be used as a default for a single payment type and/or for one or more fund sources. Accounting staff with the appropriate levels of permission can change the default for a special transaction, if necessary.

   Select the check box that corresponds to the payment type, e.g., **Cash**, **Check**, **Credit Card**, **EFT**, **Non-Cash**, and **ACH**.

   Use the **All Types** option for payment types not otherwise designated as defaults. You can select only one bank account as the default for a single payment type.

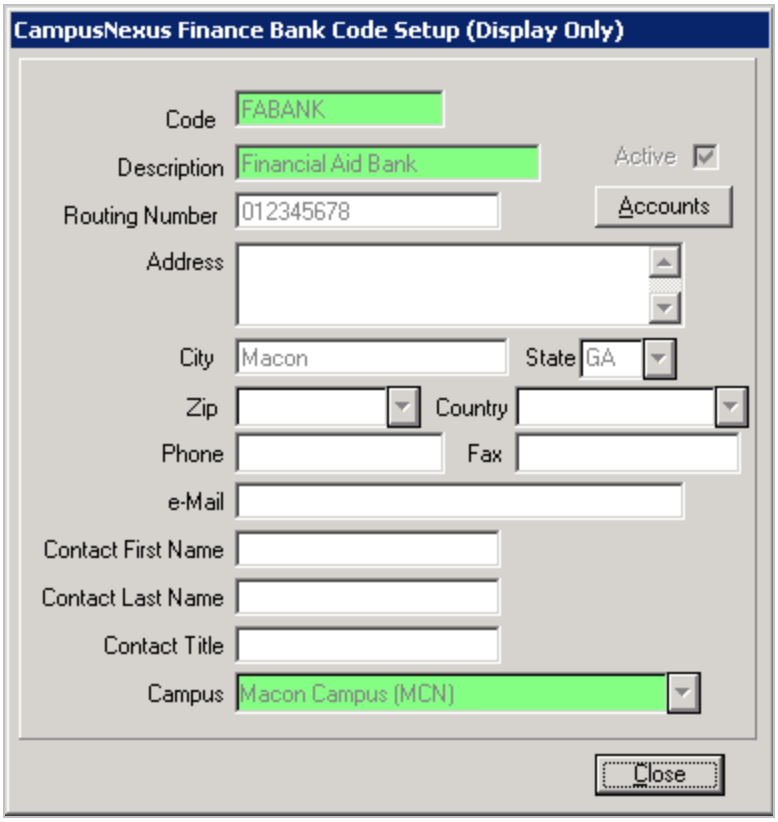
   Note: When CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll, bank accounts are set up in CampusNexus Finance, HR & Payroll, but can be edited in CampusNexus Student. In this configuration, the Select Bank Account form will display a button labeled **Edit Bank Accounts**; otherwise the button is labeled **Setup Accounts**.

4. To set up bank codes and associated bank accounts, click **Setup Accounts**. The Bank Codes Code Setup form is displayed.



When CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll, click **Edit Bank Accounts**. The CampusNexus Finance Bank Code Setup (Display Only) form is displayed. This form presents the bank information that was set up in CampusNexus Finance, HR & Payroll in read-only mode; however, you can click the **Accounts** button to view bank information created in CampusNexus Finance, HR & Payroll and to edit CampusNexus Student bank account specific fields.

The permissions assigned to the user in CampusNexus Finance, HR & Payroll determine which GL accounts the user can view in CampusNexus Student. The user can only see the Main Account with dimensions in the range that was established in CampusNexus Finance, HR & Payroll



For additional instructions on working with bank codes, refer to Lists > Student Accounts > Bank Codes.

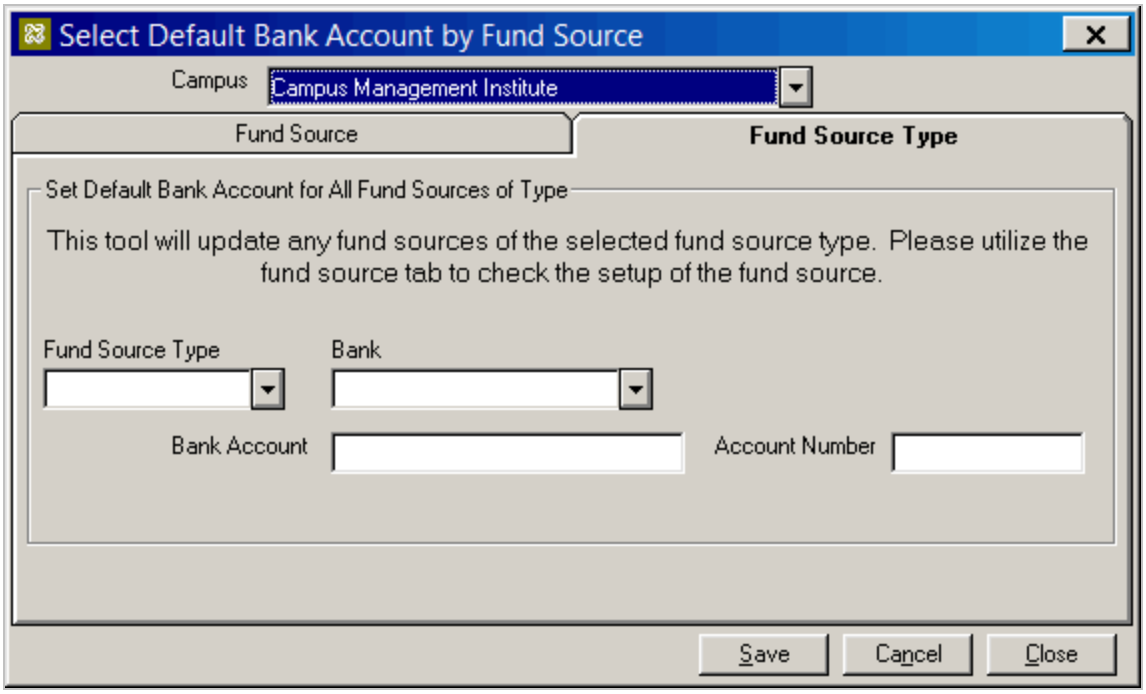
Note: Be sure your bank accounts all have designated general ledger accounts for deposits and withdrawals in the G/L link transactions.

Default Accounts by Fund Source

Once a bank account is set up, you can designate accounts as default bank accounts for various fund sources and payment types (cash, check, credit card, etc.). When bank accounts are set up, staff can post payments using a specific fund source code or payment type, and have the bank account field populate automatically. This security feature prevents users from posting funds accounts set up to for other purposes.

To set up a default bank account for each fund source type:

1. Navigate to **Setup > Student Accounts**. Select the **Additional** tab.
2. Click **Default Accounts by Fund Source**. The Select Default Bank Account by Fund Source form is displayed. You can define default bank accounts by Fund Source (tab) or Source Type (tab).



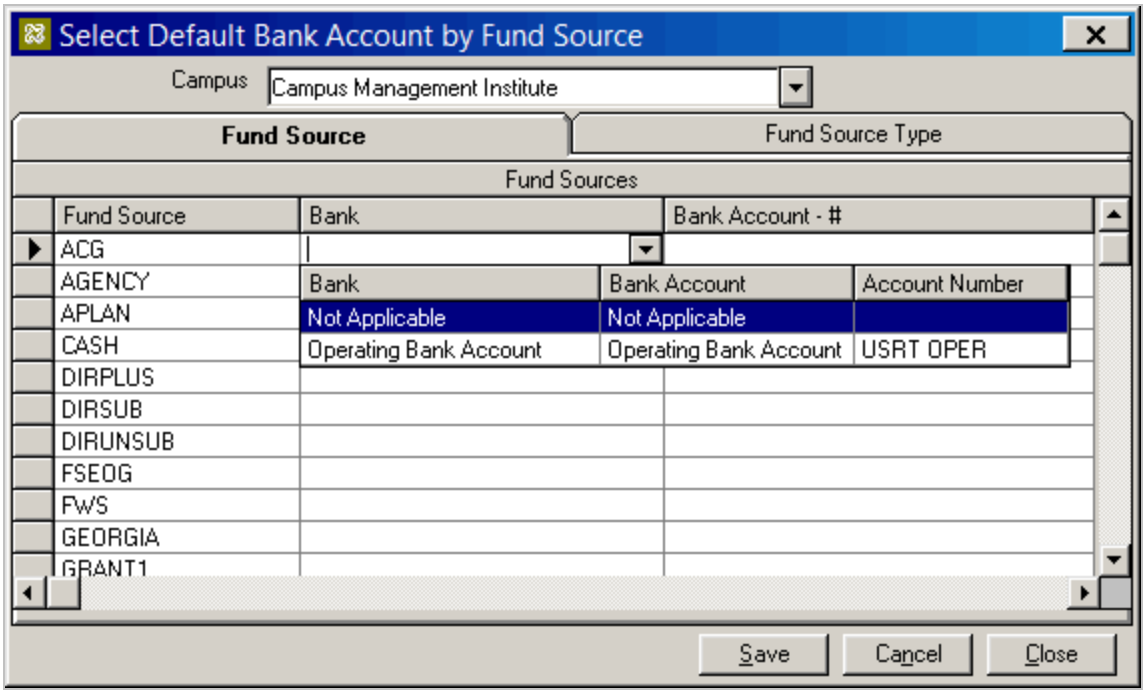
3. Select a **Campus**. All accounts associated with this campus are displayed in the Fund Sources grid.

   If multiple campuses use one account, repeat this process for each campus.

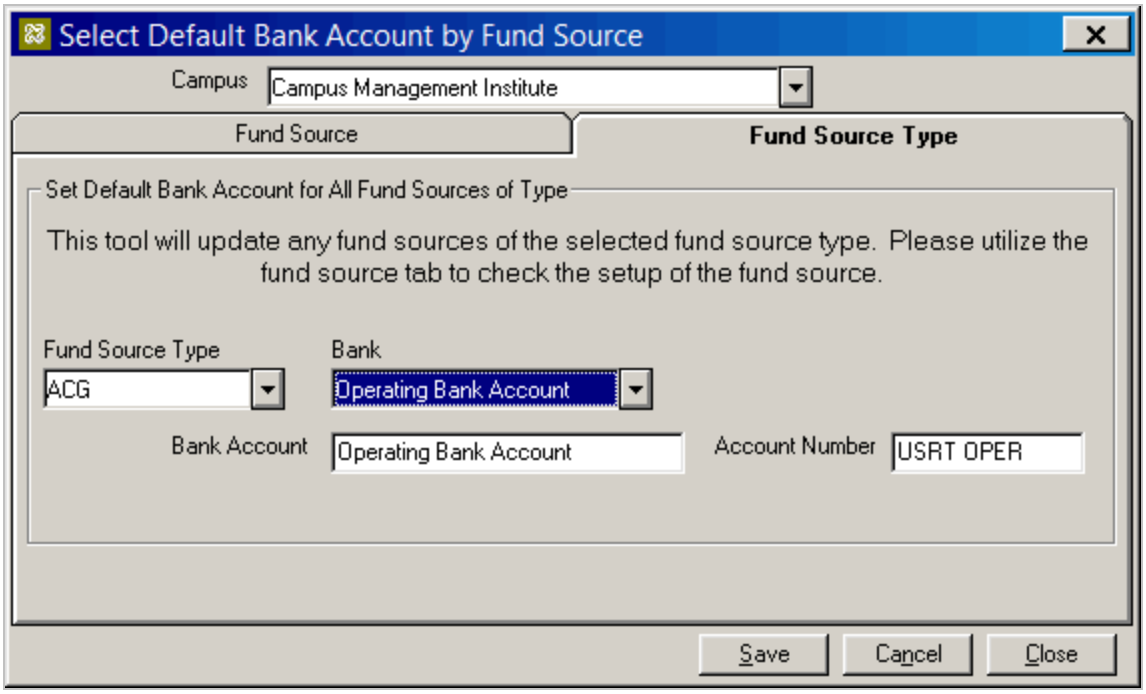
4. Associate a **Fund Source** with a specific bank account. To select a Fund Source, click the field to the left of the field that displays the code for the fund source. A right arrow marks your selection.

   The bank account for the Fund Source takes precedence over the bank account for the payment type. If no bank account has been set up for a payment type, or fund source, the account field auto-populates with the default bank account for the campus.

5. Click inside the **Bank** field. A drop-down list is enabled. Select a bank account from the list. The grid auto-populates the Bank, Bank Account and Account Number fields.



6. Click **Save** to assign the fund source to this bank account. CampusNexus Student displays a verification message indicating that the fund source bank account has been updated.
7. Click the **Fund Source Type** tab to set up default bank accounts for Fund Source Types.
8. Select a **Fund Source Type**. The options include Cash, Direct Unsubsidized Loan, Grant, etc..
9. Select a **Bank**. A drop-down list is displayed with all bank accounts listed. Select the appropriate account. The system populates the Bank Account and Account Number fields. These are read-only fields. They cannot be changed from this form.



10. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. You are returned to the Student Accounts Settings form.

ACH Setup

In CampusNexus Student you can capture student bank account information and store it in a secure, encrypted format. If your institution and financial institutions are set up to provide files in standard Automated Clearing House (ACH) response file format, your institution can provide students with direct withdrawal of funds and direct deposit of third-party funds to student accounts.

Once a campus has been set up as an ACH processor, you must record and store the student's bank account information. Authorization for direct deposit must be obtained if the student wishes to receive refunds or stipends through ACH. Once a payment, refund, or stipend has been scheduled and approved, you select the ones to be sent to ACH through the Process Refunds/Stipends wizard and export payments, refunds, and stipends in the batch using the Process Electronic Draft wizard.

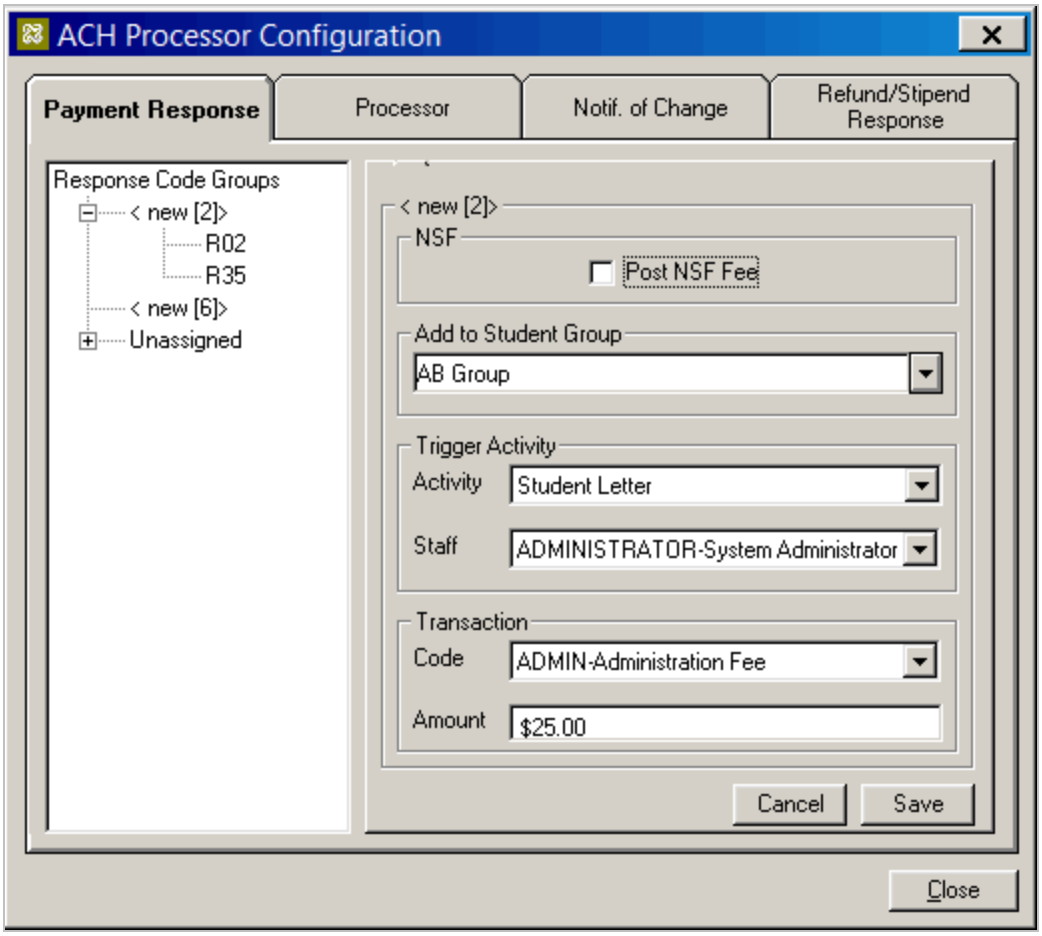
For detailed information on ACH rules and processing, contact the National Automated Clearing House Association, http://www.nacha.org.

To set up ACH processing for your institution:

1. Navigate to **Setup > Student Accounts**. Select the **Additional** tab.
2. Click **ACH Setup**. The ACH Processor Configuration form is displayed. The form has four tabs:
    - Payment Response
    - Processor
    - Notif. of Change
    - Refund/Stipend Response

ACH Payment Response Tab

The Payment Response tab defines your school's policy for payments in which the student's bank sent a response. The directory tree on the left side of the tab enables the authorized user to create groups and associate Response Codes with these groups. Unassigned groups and associated Response Codes are not processed through CampusNexus Student.

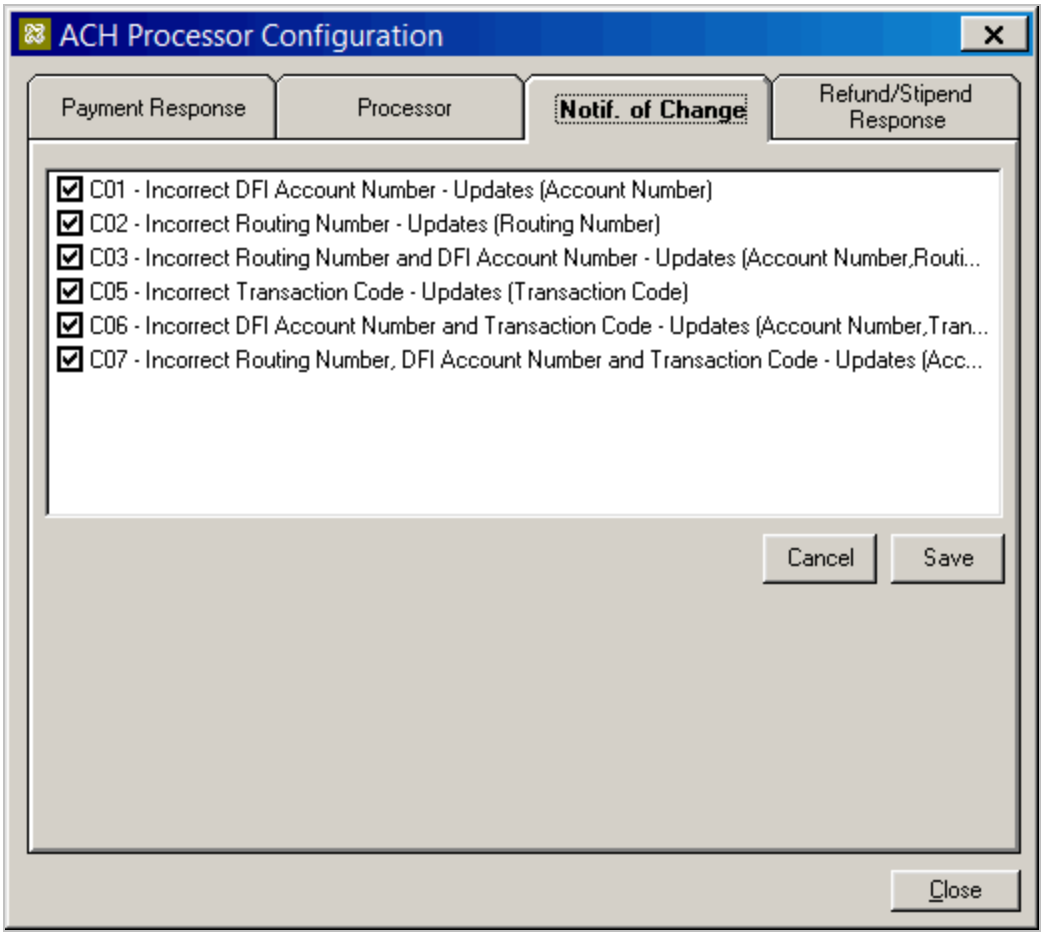


To add or remove a group with associated Payment Response Codes:

1. Place your cursor on the words "Response Code Groups" and right-click. A list is displayed with the options to add or delete a group. Click **Add Group** to add a group.
2. To delete a group, place your cursor on an existing group name and right-click. Select **Delete group** to remove it. Click **Delete Group**.
3. Select the **Post NSF** check box if your institution policy is to post an NSF to the student's Ledger Card when a payment was rejected. Most institutions charge a fee for non-sufficient funds (NSF) checks. The fee is applied automatically when an NSF is posted as a reverse payment. If you select Post NSF, the Transaction lists become disabled. This is because most schools that charge an NSF fee do not charge additional fees in conjunction with the transaction.
4. Use the list next to the **Add to Student Group** field to associate a Response Code Group with an existing campus group. For example, assign members of the NSF group to an existing Hold Group.
5. Select a **Trigger Activity** associated with the Payment Response Code Groups.
6. Select a **Staff** member associated with the trigger activity.
7. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

ACH Notification of Change Tab

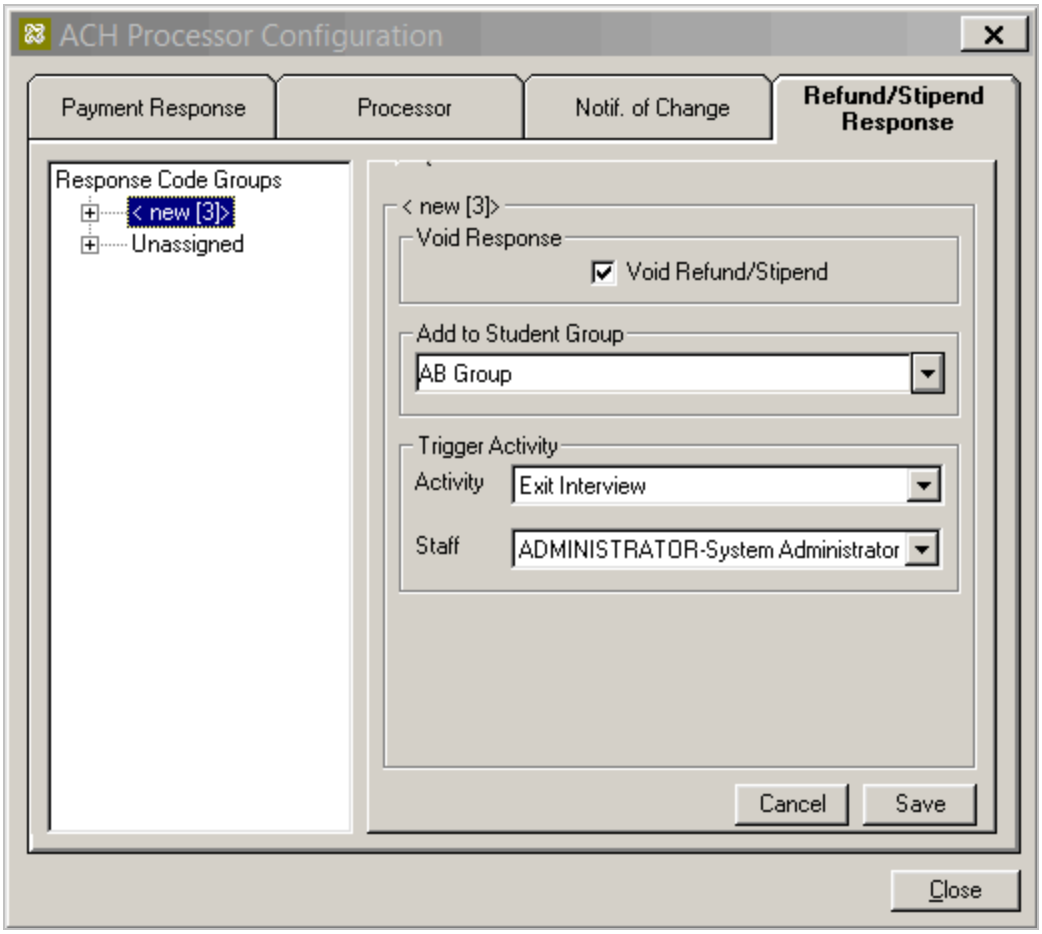
A Notification of Change (NOC) is created by a student's bank to notify the institution that previously valid information has become outdated. CampusNexus Student can update the file with the correct information if it is set up to do so from the Notification of Change tab.



Check boxes on this tab correspond to NOC Codes (C01, C02, etc.). Select as many as required. The student's record and all forms in CampusNexus Student in which this information is displayed are also updated. For example, if C02 (incorrect routing number) is selected, CampusNexus Student updates all student banking forms with the correct routing number.

ACH Refund/Stipend Response Tab

The Refund/Stipend Response tab defines your school's policy for refunds when the student's bank sends a response. The directory tree on the left side of the tab enables the authorized user to create groups and associate Response Codes with these groups. Unassigned groups and associated Response Codes are not processed through CampusNexus Student.



To add or remove up a new group with associated Refund Response Codes:

1. Place your cursor on the words "Response Code Groups" and right-click. A list is displayed with the options to add or delete a group. Click **Add Group** to add a group.
2. To delete a group, place your cursor on an existing group name and right-click. Select **Delete group** to remove it. Click **Delete Group**.
3. Select the **Void Refund/Stipend** check box if your institution policy is to post voided transactions to the student's Ledger Card when a refund transaction is voided. If reverse GL entries are required for refunds, select this option. This option may be assigned to individual response codes as necessary.
4. Use the list next to the **Add to Student Group** field to associate a Response Code Group with an existing campus group.
5. Select a **Trigger Activity** associated with the Refund Response Code Groups.
6. Select a **Staff** member that will be associated with the trigger activity.
7. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

To generate an ACH batch processing report:

Navigate to **Reports > Student Accounts > ACH Batch Report** and **Reports > Student Accounts > ACH Batch Detail**.

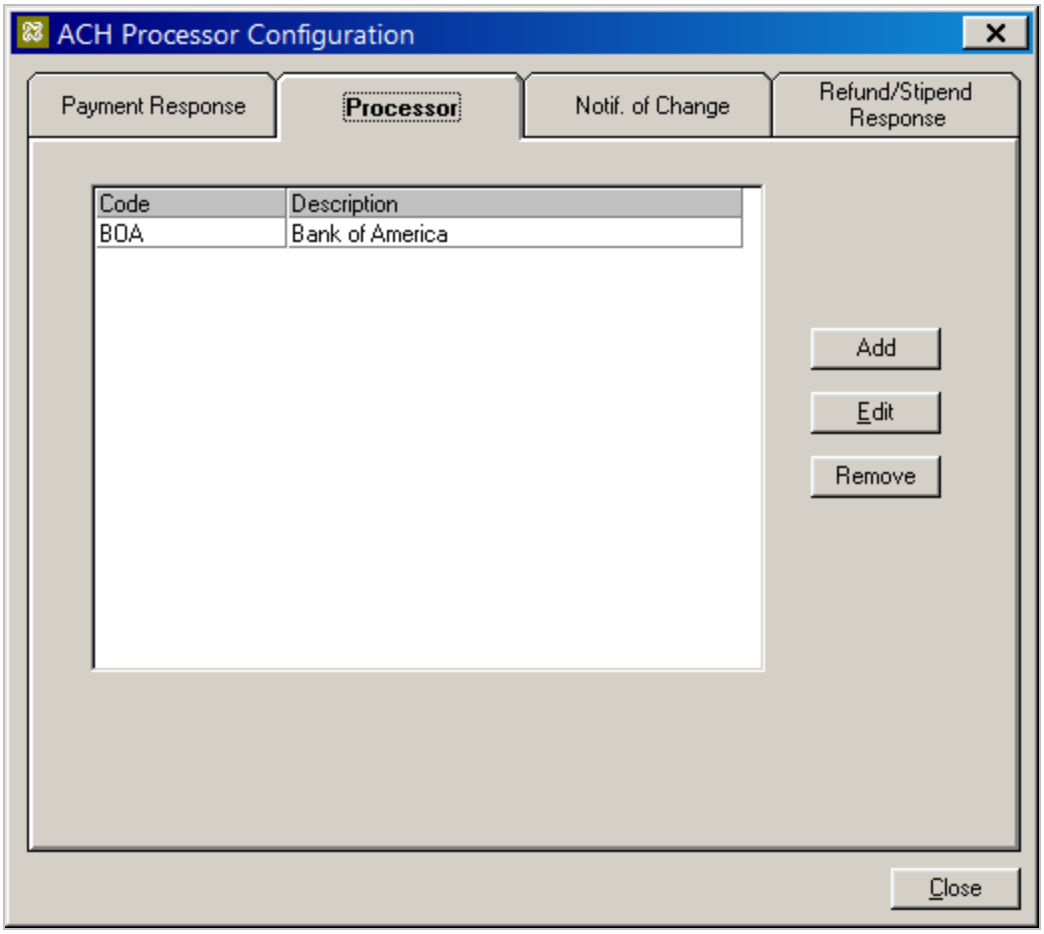
ACH Setup - Processors

CampusNexus Student allows you to configure multiple ACH processors. You can add, edit, and remove ACH processors on the Processor tab of the ACH Processor Configuration form.

Note: It is assumed that you have already set up default bank accounts for this purpose. See Payment Information for setting up the student's bank account information.

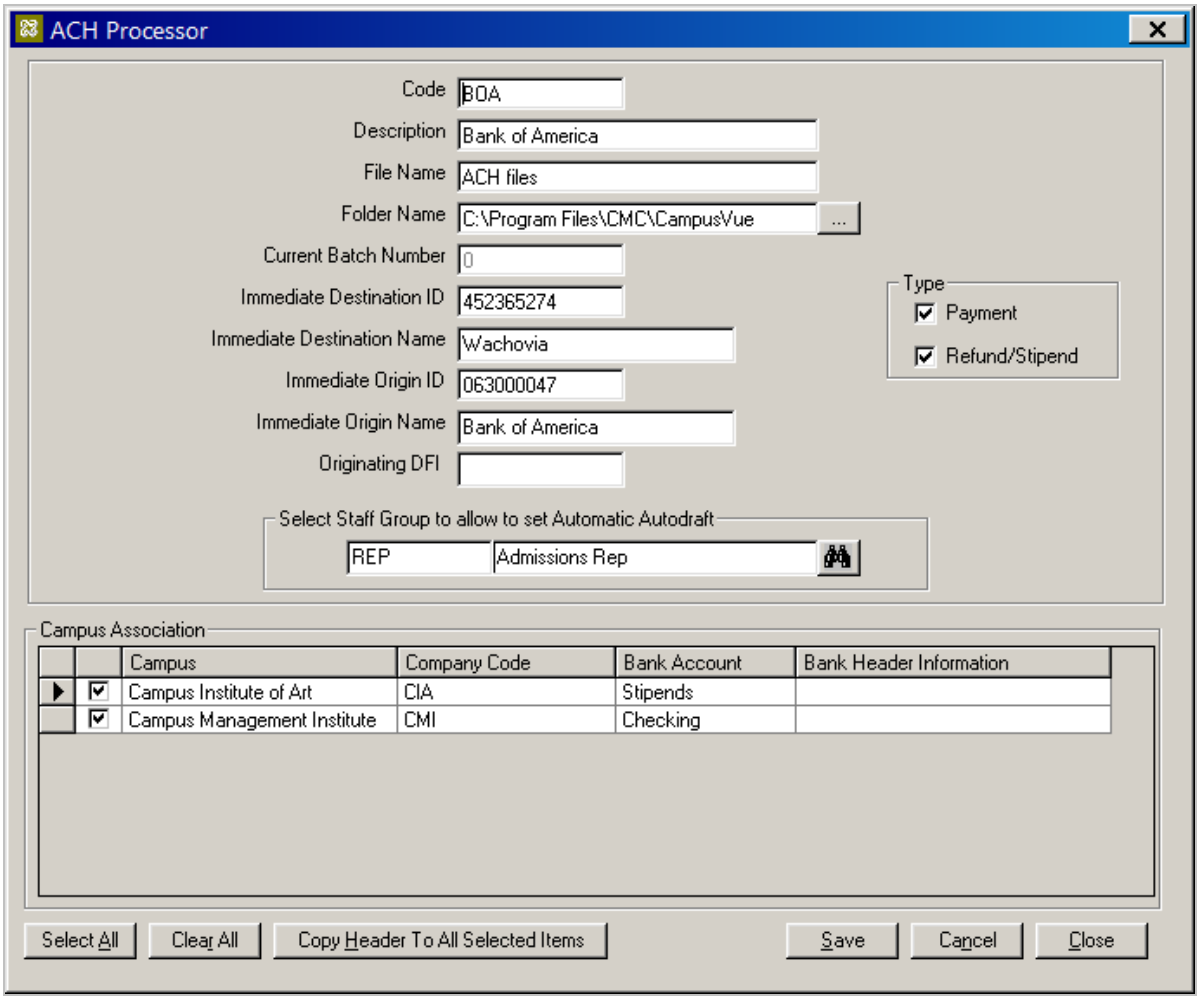
To add or edit ACH processors:

1. Navigate to **Setup > Student Accounts**. Select the **Additional** tab and click **ACH Setup**. The ACH Processor Configuration form is displayed. Click the **Processor** tab.



2. Click **Add**, or select a record and click **Edit**. The ACH Processor form is displayed.

   Note: If all campuses have been assigned an ACH processor, CampusNexus Student displays the following message: *All campuses have been assigned an ACH processor. Setup cannot continue.* Click **OK** to return to the ACH Processor form. Click **Close** to close the form.



3. Specify appropriate options. See Field Descriptions.

Field Descriptions

Field	Description
Code	School-defined Code name to serve as an abbreviation for the ACH
Description	Name of the ACH with some identifying information. For example, "Check-Kwik, New York" to indicate that this is the ACH processor your institution's New York campus uses.
File Name	Name of the file that is sent to the ACH for batch processing
Folder Name	File folder for the ACH information to be transmitted to the processor Click ... to select a disk drive and folder. You must select a folder that has already been created by a system administrator. You cannot create a new folder unless you have system administration privileges.

Field	Description
Current Batch Number	A unique identifier of this batch of transactions sent to the ACH.
Immediate Destination ID	10-character routing number of the ACH.
Immediate Destination Name	Name of the ACH.
Immediate Origin ID	9-character routing number of the "Sender", which is your institution.
Immediate Origin Name	Name used to define your institution (up to 10 alphanumeric character).
Originating DFI	Originating Depository Financial Institution used to identify a site as the DFI originating the entries. This optional field allows up to 8 numeric digits. If it is left blank, CampusNexus Student uses the Immediate Origin ID. You can enter the Originating DFI while configuring the ACH processor information, and once it is configured, it will be used in the ACH export file in field positions 80 to 87 of the 5 record and 8 record.
Select Staff Group to allow to set Automatic Autodraft	Click to search for the Staff Group that will be allowed to set automatic auto drafts.
Type	Type of transactions that this ACH processor transmits. The options are: • Payment (payments from the student) • Refund/Stipend (refunds to the student/stipends to the student).
Campus Association	Select the campuses that you want to associate with the new processor.You can set up multiple ACH processors per Campus.
Bank Header Information	Specify the Bank Header Information. CampusNexus Student produces an export file that the Automated Clearing House (ACH) uses to execute transactions between banking institutions and clients. Some banks may require a formatted header record to appear as the first record in the file for processing the export file correctly. It is time-consuming to manually insert the formatted header record into the export file each time you process an ACH transaction, considering that you may process several ACH file exports daily. Therefore, CampusNexus Student provides an automated process for adding the header records. When processing an ACH file through the Process Electronic Draft wizard, CampusNexus Student inserts the header records that you have set up and places the header in the exported ACH file.

4. Click **Select All** to highlight all records, or click **Clear All** to cancel the selection of all records.
5. To copy the text in the Bank Header Information column to other rows, click **Copy Header to All Selected Items**. The Bank Header Information value is copied and placed in the Bank Header Information field for all records that

were selected. An informational message is displayed if Bank Header Information already exists in any of the selected campuses. The message presents two options:

- Select **Copy Bank Header Information to blank column(s) only** to copy the Bank Header Information to the selected campuses that do not already have values in the Bank Header Information field.
- Select **Copy Bank Header Information to all column(s)** to override any values that were in the Bank Header Information field and replace them with the new Bank Header Information value.

You must click **OK** after selecting an option to trigger this automated feature. If you do not want any changes to occur, click **Cancel**.

If you are trying to copy a Bank Header Information value when the value is blank, an information message is displayed stating "*To copy Bank Header Information for all selected campuses, the Bank Header Information row must be populated*".

6. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

ACH Response Codes

ACH Response Codes represent reasons for non-payment by the ACH Processor. Typical reasons are insufficient funds in the student's account (NSF), incorrect routing number, account closed, etc.

For detailed information on ACH rules and processing and detailed descriptions of response codes, contact the National Automated Clearing House Association, http://www.nacha.org.

Note: Response codes are assigned to groups in the Payment Response tab of the ACH Processor Configuration form. When you point over a Response Code in the left panel of this tab, a the Reason Name is displayed.

ACH Response Codes

Response Code	Reason Name	Reason Description
R01	Insufficient Funds	The available and/or cash reserve balance is not sufficient to cover the dollar value of the debit entry
R02	Account Closed	A previously active account has been closed by action of the customer or the RDFI
R03	No Account/Unable to Locate Account	The account number structure is valid and it passes the check digit validation, but the account number does not correspond to the individual identified in the entry or the account number designated is not an open account.
R04	Invalid Account Number	The Account number structure is not valid. The entry may fail the check digit validation or may contain an incorrect number of digits
R05	Reserved	Reserved
R06	Return per ODFI's Request	The ODFI has requested that the RDFI return the ACH entry. If the RDFI agrees to return the entry, the ODFI must indemnify the RDFI according to Article Five (Return, Adjustment, Correction, and Acknowledgment of Entries and Entry Information) of these Rules.

Response Code	Reason Name	Reason Description
R07	Authorization Revoked by Customer (Adjustment Entries)	The RDFI's customer (the Receiver) has revoked the authorization previously provided to the Originator for this particular transaction. The Receiver may request immediate credit from the RDFI for an unauthorized debit. The request must be made in writing within fifteen (15) days after the RDFI sends or makes available to the Receiver information pertaining to that debit entry. The Receiver must also provide the RDFI with a written statement under penalty of perjury that the authorization for the debit entry has been revoked by the Receiver. The RDFI must return the rescinded transaction to its ACH Operator by its deposit deadline for the adjustment entry to be made available to the ODFI no later than the opening of business on the banking day following the sixtieth calendar day following the Settlement Date of the original entry. This code and related Operating Rule provisions apply to Consumer entries only. (Note: This Return Reason Code may not be used for POP entries, Single-Entry WEB entries, or TEL entries.)
R08	Payment Stopped	The Payment of a debit transaction has the right to stop payment on any specific ACH debit.
R09	Uncollected Funds	Sufficient book or ledger balance exists to satisfy the dollar value of the transaction, but the dollar value of transactions in process of collection brings the available and/ or cash reserve balance below the dollar value of the debit entry.
R10	Customer Advises Not Authorized, Notice Not Provided, Improper Source Document, or Amount of entry Not Accurately Obtained from Source Document	
R11	Check Truncation Entry Return	This Reason is only used if no other return reason code is applicable. The addenda Record should specify the reason for return. (i.e., "exceeds dollar limit").
R12	Branch Sold to another DFI	A Financial institution may continue to receive entries destined for an account at a branch that has been sold to another financial institution. Because the RDFI no longer maintains the account and is unable to post the entry, it should return the entry to the ODFI.
R14	Representative Payee Deceased or Unable to Continue in that Capacity	The representative payee is a person or institution authorized to accept entries on behalf of one or more other persons. The representative payee is deceased or unable to continue in that capacity. The beneficiary is not deceased.

Response Code	Reason Name	Reason Description
R15	Beneficiary or Account Holder (other Than a Representative Payee) Deceased	(1) The beneficiary is the person entitled to the benefits and is deceased. The beneficiary may or may not be the account holder or (2) The account holder is an owner of the account and is deceased.
R16	Account Frozen	The Funds in the account are unavailable due to specific action taken by the RDFI or by legal action.
R17	File Record Edit Criteria	Some Fields that are not edited by the ACH Operator are edited by the RDFI. The fields causing the processing error must be identified in the addenda record information field of the return.
R20	Non-Transaction Account	The ACH entry destined for non-transaction account, as defined in Regulation D, would include an account against which transactions are prohibited or limited or a pass-through where the entry is for a credit union or thrift organization and Regulation E descriptive requirements cannot be met.
R21	Invalid Company Identification	The identification number used in the Company Identification Field is not valid. This Return Reason Code is normally used on CIE transactions
R22	Invalid Individual ID Number	In CIE and MTE entries, the Individual ID Number is used by the Receiver to identify the account. Receiver has indicated to the RDFI that the number with which the Originator was identified is not correct.
R23	Credit Entry Refused by receiver	The Receiver may return credit entry because one of the following conditions exists: 1. A minimum amount required by the Receiver has not been remitted. 2. The exact amount required by the Receiver has not been remitted. 3. The account is subject to litigation and the Receiver will not accept the transaction. 4. Acceptance of the transaction results in an overpayment. 5. The originator is not known by the Receiver; or (6) the Receiver has not authorized this credit entry to this account.
R24	Duplicate Entry	The RDFI has received what appears to be a duplicate entry; i.e., the trace number, date, dollar amount and /or other data matches another transaction. This code should be used with extreme care. The RDFI should be aware that if a file has been duplicated, the Originator may have already generated a reversal transaction to handle the situation
R29	Corporate Customer Advises Not Authorized	The RDFI has been notified by the Receiver that a specific transaction has not been authorized by the Receiver

Response Code	Reason Name	Reason Description
R31	Permissible Return Entry (CCD and CTX only)	N/A
R33	Return of XCK Entry	The RDFI determines at its sole discretion to return an XCK (Destroyed Check Entry).
R37	Source Document Presented for Payment	The source document to which an ARC entry or a POP entry relates has been presented for payment. The Receiver may request immediate credit from the RDFI for an ARC entry or a POP entry for the reason described above. The request must be made in writing within fifteen (15) days after the RDFI sends or makes available to the Receiver information relating to that debit entry. The Receiver must also provide the RDFI with a written statement under penalty of perjury that the source document was presented for payment. An RDFI using this return reason code must transmit the return entry by its ACH Operator's deposit deadline for the return entry to be made available to the ODFI no later than the opening of business on the banking day following the sixtieth calendar day following the Settlement Date of the ARC entry or the POP entry.
R38	Stop Payment on Source Document	The RDFI determines that a stop payment order has been placed on the source document to which the ARC entry relates. An RDFI using this Return Reason Code must transmit the return entry by its ACH Operator's deposit deadline for the return entry to be made available to the ODFI no later than the opening of business on the banking day following the sixtieth calendar day following the Settlement Date of the ARC entry to which the source document relates.
R40-47	Codes to be Used by Federal Government Agencies Returning ENR Entries (Automated Enrollment Entry)	
R50-53	Codes to be Used for the Return of RCK Entries (Re-presented Check Entry)	
R80-84	Codes to be Used for the Return of CBR and PBR Entries (Corporate or Consumer Cross Border Payments)	
	Codes to be Used by ACH Operator	

Response Code	Reason Name	Reason Description
R13	Receiving DFI Not Qualified to Participate	RDFI not qualified to participate or the Routing Number is not valid
R18	Improper Effective Entry Date	The effective entry date for credit entry is more than two banking days after the banking day of processing as established by Originating ACH Operator
R19	Amount Field Error	• Amount Field is non-numeric • Amount Field is not zero in an entry other than a pre-notification, DNE, ENR, Notification of Change, Refused Notification of Change, or zero dollar entry • Amount field is zero in an entry other than a pre-notification, DNE,ENR, Notification of Change, Refused Notification of Change, Return, Dishonored Return, Contested Dishonored Return, or zero dollar entry
R25	Addenda Error	
R26	Mandatory Field Error	
R27	Trace Number Error	
R28	Routing Number Checking Digit Error	
R30	RDFI Not participant in Check Truncation Program	
R32	RDFI Non-Settlement	
R34	Limited Participation DFI	
R35	Return of Improper Debit Entry	
R36	Return of Improper Credit Entry	
C01	Incorrect DFI Number	
C02	Incorrect Routing Number	
C03	Incorrect Routing Number & Incorrect DFI Account Number	
C04	Incorrect Individual Name/Receiving Company Name	Correct Individual Name/Receiving Company Name is displayed in first 22 positions of the Corrected Data Field.
C05	Incorrect Transaction Code	
C06	Incorrect DFI Account Number and Incorrect Transaction Code	

Response Code	Reason Name	Reason Description
C07	Incorrect Routing Number, Incorrect DFI Account Number and Incorrect Transaction Code	Correct Routing Number (including Check Digit) is displayed in the first nine positions of the Corrected Data Field -- correct DFI Account Number is displayed in the 10th through 26th positions of the same field -- and correct Transaction Code is displayed in the 27th and 28th positions of the same field.
C09	Incorrect Individual Identification Number	
C13	Addenda Format Error	CBR, PBR: This change code should not be used for outbound cross-border entries due to field length limitations.

Credit Card Batch Setup

CampusNexus Student offers the means to set up automated payment schedules for students and process these payments in batches. Once batches have been processed, the program automatically updates the Student Ledgers and Payment Information folders to reflect payments made. To set up web payments, see Campus Electronic Processing.

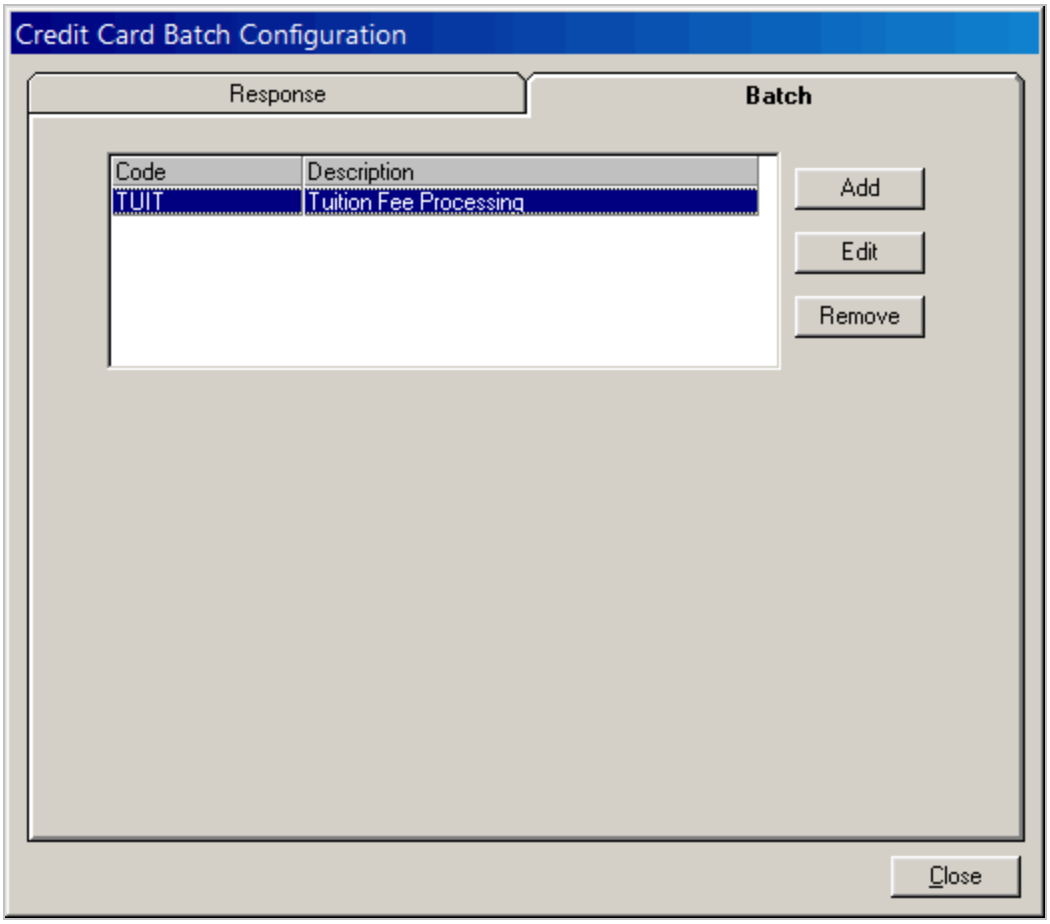
Note: Currently, CampusNexus Student supports only Verisign for credit card processing. Institutions must select Verisign as their processor and purchase Payflow Pro from VeriSign. The client must be installed on the server, allowing for the secure connection between the server and VeriSign. All transmission data are encrypted for security.

To set up credit card batch processing:

1. Navigate to **Setup > Student Accounts**. Select the **Additional** tab.
2. Click **Credit Card Batch Setup**. The Credit Card Batch Configuration form is displayed. The form has two tabs:
    - Batch
    - Response

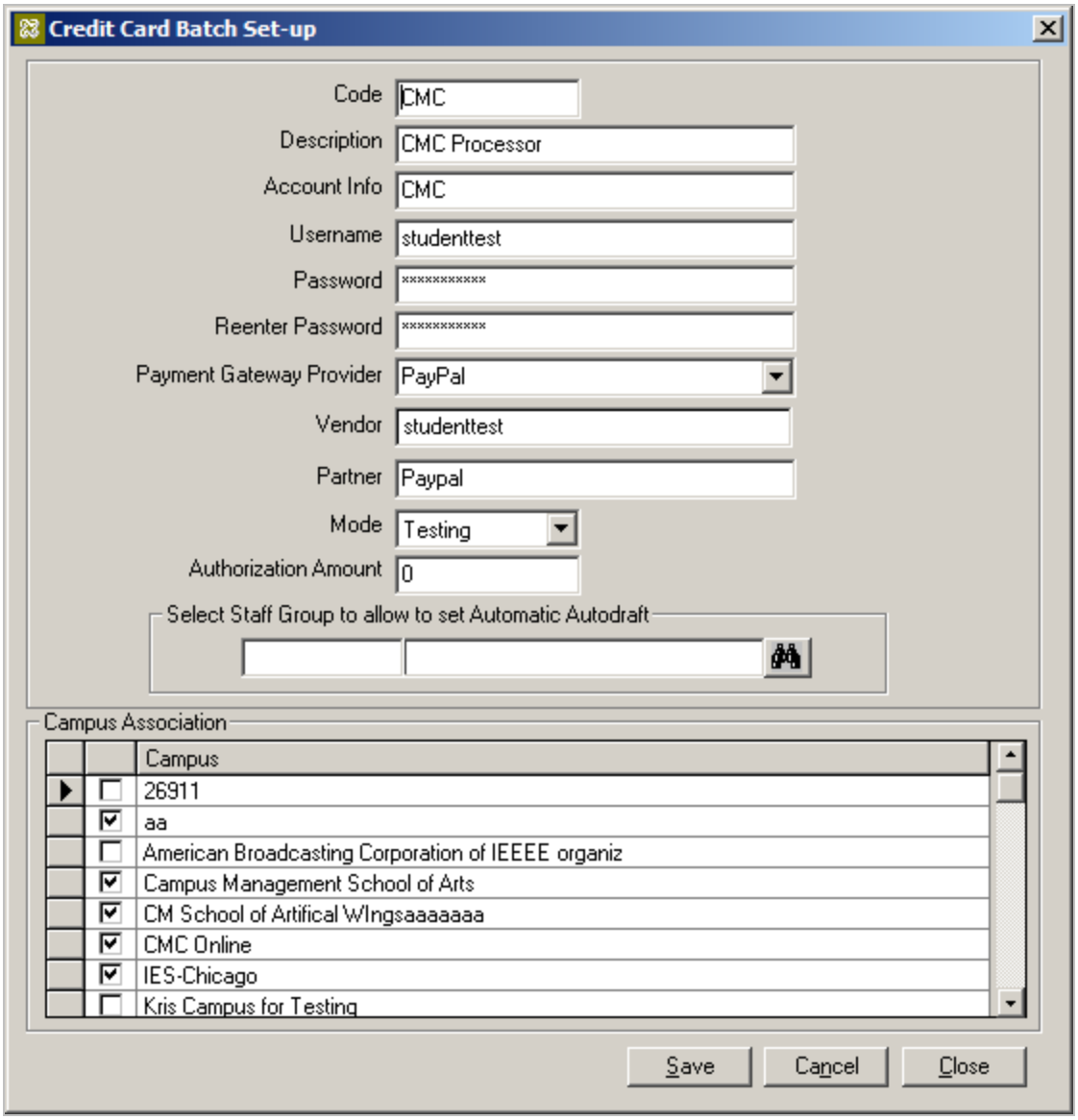
Batch Configuration

The authorized administrator sets up the batch configuration and sets permission for a staff group to work with auto drafts and the campuses to associate with this account.



To add or edit a credit card batch:

1. Click **Add**, or select a record and click **Edit**. The Credit Card Batch Set-up form is displayed.

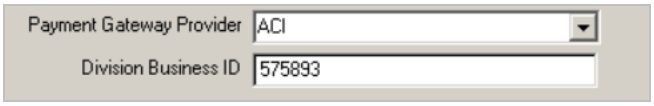


2. Specify a unique **Code**.
3. Enter a **Description**.
4. Specify the account number used for processing this batch in the **Account Info** field.
5. Specify the **User name** assigned to this account by the payment gateway provider.
6. Specify the **Password** assigned to this account by the payment gateway provider.
7. Re-type the password in the **Reenter Password** field for confirmation.

8. Select a **Payment Gateway Provider**. Currently, CampusNexus Student supports only PayPal or ACI.
9. Specify the **Authorization Amount** being used to authorize the credit card when adding a new credit card. This amount can be changed based on the requirements of the credit card processor, as some credit card processors do not allow an authorization amount of $0.00.
10. Click to select the staff group that is permitted to create batches of automated credit card payments from the **Select Staff Group to allow to set Automatic Autodraft** field.

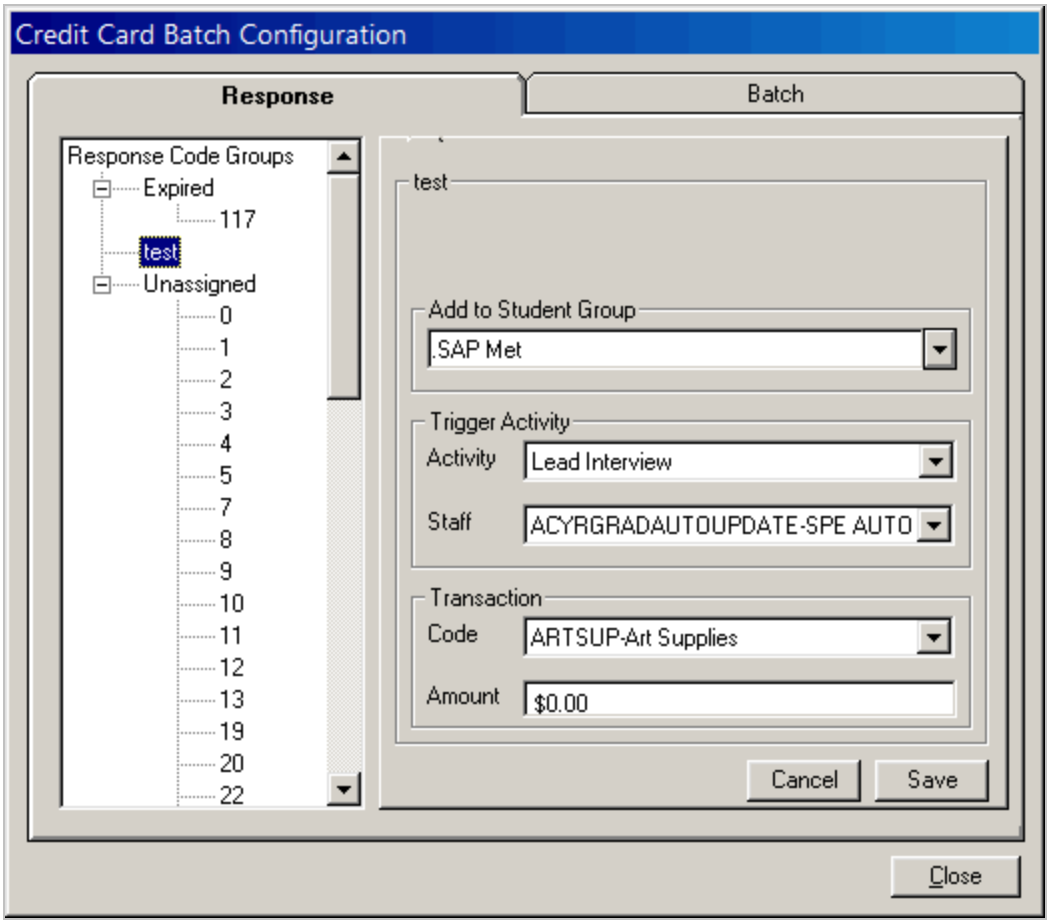
    Note: This staff group must have been set up in Setup > Staff > Staff Groups.
11. In the Campus Association section, select the **Campus**(es) associated with this processor.
12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Note: When the **Payment Gateway Provider** is set to ACI, the **Vendor** field is changed to the **Division Business ID** field. Also, the **Partner** field is not displayed, as it is not applicable for ACI.



Response Configuration

The Response tab is used to configure response codes for failed transactions to associate with actions the institution will take when such failures occur. The functionality is the same as the existing ACH response codes functionality. CampusNexus Student can generate reports of failed transactions. See View Rejected Report for this information.



Response codes must belong to a named group, which you add by right-clicking on Response Code Groups and selecting Add Group. Edit the name of the new group by clicking on the name field and editing the text. Move Response Codes to a named group by highlighting the code and then dragging and dropping it into the desired group. The Unassigned group is a place-holder and cannot be configured.

To configure credit card batch processing response codes:

1. Click on an unassigned Response Code within a Response Code Group.
2. From the **Add to Student Group** list select a student group with which to associate this Response Code .
3. From the **Activity** list select a Contact Manager activity that is triggered when the select Response Code occurs. The trigger activities are Contact Manager activities that are specified under Lists > Contact Manager > Activities.
4. From the **Staff** list, select a staff member that CampusNexus Student will contact when the trigger activity occurs. The staff in the list are those specified at Setup > Staff.
5. From the **Code** list select a transaction code.
6. Specify a dollar **amount** which will be charged and posted to the student's Ledger Card when this Response Code occurs.
7. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

GL Link

The General Ledger Link form is used to set up basic accounting relationships between CampusNexus Student and your general ledger system. The links are on a campus-by-campus basis.

You select which general ledger accounts are to be affected when posting transactions to Student Ledger Cards. The accounts are set up by campus and can use the same account number for all programs and program versions or separate account numbers for each program or program version.

If your CampusNexus Student system is integrated with an accounting system, see Integrated Accounting.

For information on setting up GL accounts for fund sources, subsidiaries, and miscellaneous receipts refer to the following topics:

- Fund Source GL Accounts/Refunds/Stipends
- Subsidiaries
- Miscellaneous Receipts

To define the G/L links for each campus between CampusNexus Student and your general ledger system:

1. Navigate to **Setup > Student Accounts**. Select the **Additional** tab.
2. Click **G/L Link**. The Student Accounts - General Ledger Link form is displayed.
3. Select the **Campus** for which you want to set up the G/L accounts.
4. The **Default A/R Account** for the selected campus displayed. All debits and credits to Student Ledger Cards are associated with this account.

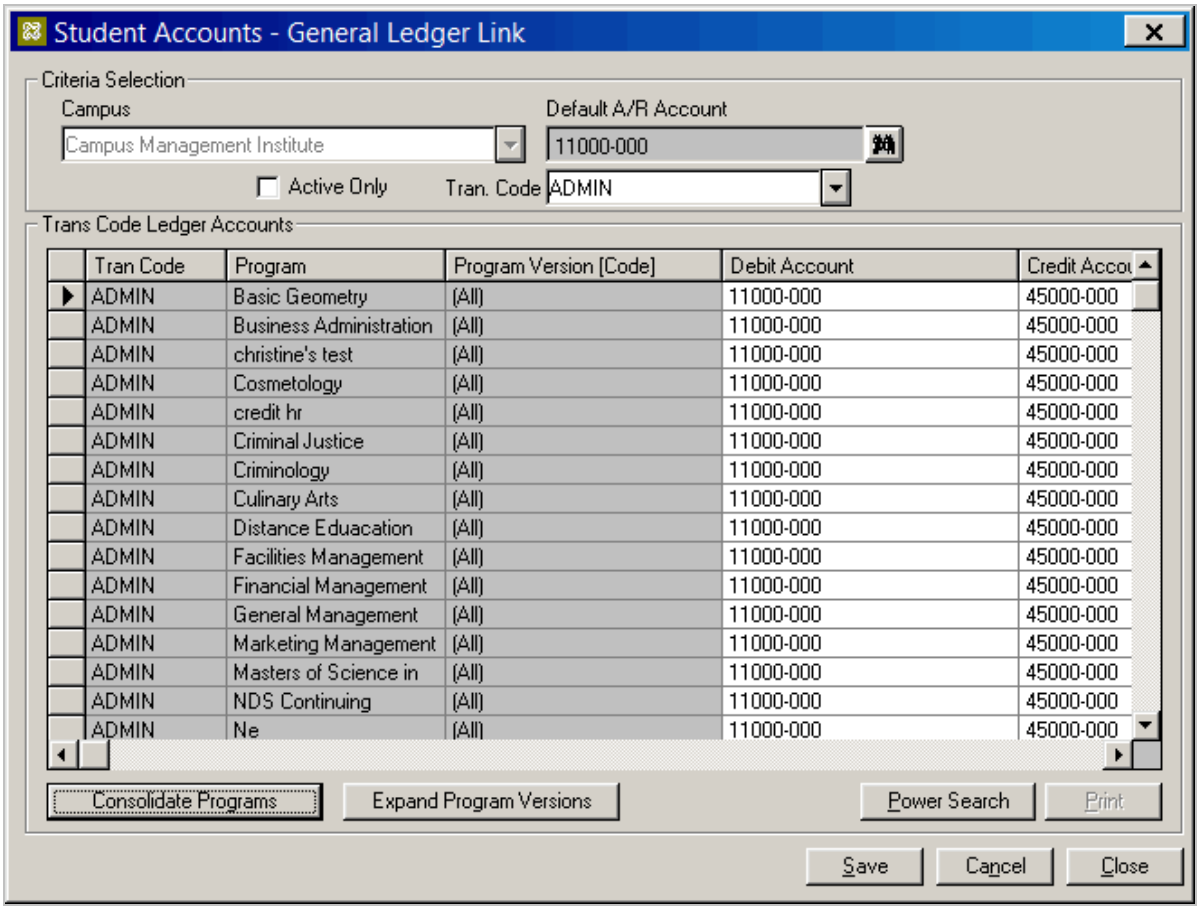
   See Initial Configuration of CampusNexus Finance, HR & Payroll.
5. Select **Active Only** to see only the active Transaction Codes.
6. Select a **Transaction Code**. The grid is populated with the appropriate general ledger record.

   Note: The Tran. Code list is populated with the transaction codes for the selected campus. See Lists > Student Accounts > Transaction Codes for information on setting up transaction codes.
7. Click **Expand Programs**. The label on the button changes to **Consolidate Programs**. CampusNexus Student expands the list to show each Program and Program Version offered by the selected campus.

   Enter appropriate debit, credit, and revenue account numbers for each program version.

   Note: When the **Consolidate Programs** button is clicked, any account numbers that are blank at the time are populated with the account numbers from the row that is selected at the time of clicking the button.

   - If you click **Save** while the programs are consolidated, all account numbers will be overwritten.
   - If you consolidate and expand without clicking **Save**, the numbers previously populated will be preserved. You can **Save** after the programs are in the expanded state. This is useful when adding programs. You may have different account numbers for each program and bill code combination.



8. Select a **Program** and click **Expand Program Versions**. The label on the button changes to **Consolidate Program Versions**.

   If you click **Consolidate Program Versions** while the cursor is on an expanded transaction code, CampusNexus Student reduces the transaction code list that has been split by program version to the current line with the account numbers entered on that line. All program versions will be associated with those account numbers.

9. For each **Transaction Code** on the grid, enter a **Debit Account** and a **Credit Account**. Click on a cell and click **F2** to edit it. When you change a cell, the **Save** and **Cancel** buttons are enabled.

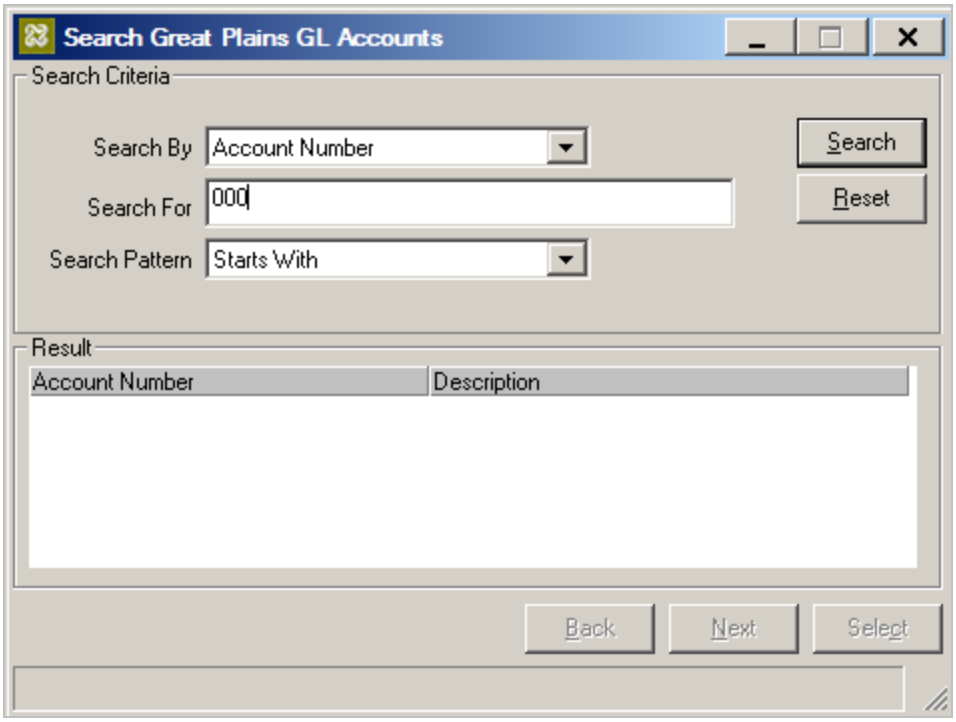
   If the transaction code is flagged as a deferred revenue account (for example, tuition), enter a **Revenue Account** number. (You may not see this column on the grid until you select a transaction code that is deferred.)

   Transaction codes such as Tuition are usually set up as deferred revenue transactions. This means that when they are posted to a student's ledger card, an A/R account is debited and a deferred revenue account is credited. When you perform the monthly Revenue Recognition procedures, the deferred revenue account is debited and the revenue account is credited.

   - If the Great Plains search feature is enabled, select a row, and click the **Great Plains Search** button to search for Debit Account or Credit Account numbers in the Great Plains GL.

     a. In the Search Great Plains GL Accounts form, click the **Search By** list. Search for GL Accounts using the **Account Number** or **Description**.

Note: These searches also return Stipend Account information when you have set up separate debit and credit account numbers for stipends.



b. In the **Search For** field, enter the account number or description.

c. Specify the **Search Pattern**. The Search pattern works as follows:

- “Starts With” finds an exact match on data that starts with the characters you specify.

  Enter dashes when using this method. For example, if you have a mask that uses ###-####-## and you enter 0000, you will not get any matches. You must enter 000- or 000-0 to get matches, where the first four digits in the account number are zeros.

- "Contains" finds any value that contains what you have entered.
- "Wildcard" searching uses % for any string that follows what is entered. The "_" only replaces a single character.
- "Exact Match" must contain everything you enter. There cannot be additional characters before or after what was entered. If you are not sure of the exact wording, choose “Contains”.

d. Click **Search**. All GL Accounts that meet the specified criteria are displayed in the result grid.

Based on the value specified in the Max GP GL Account Search field, the results grid displays the data in one page or across many pages. If there are more records than the default number of rows, CampusNexus Student displays:

- Number of records displayed.
- Total number or records matched.
- A Next button to display the next records matched.

e. Double-click the applicable row, or click **Select** to add the account details to the Debit Account or Credit Account field.

f. Click **Save**. CampusNexus Student saves all records for all campuses that use Great Plains, that contain both a valid Debit and Credit Account or both the Debit and Credit accounts are blank. An error message is displayed if any campus that uses Great Plains is using an incorrect Debit and/or Credit account.

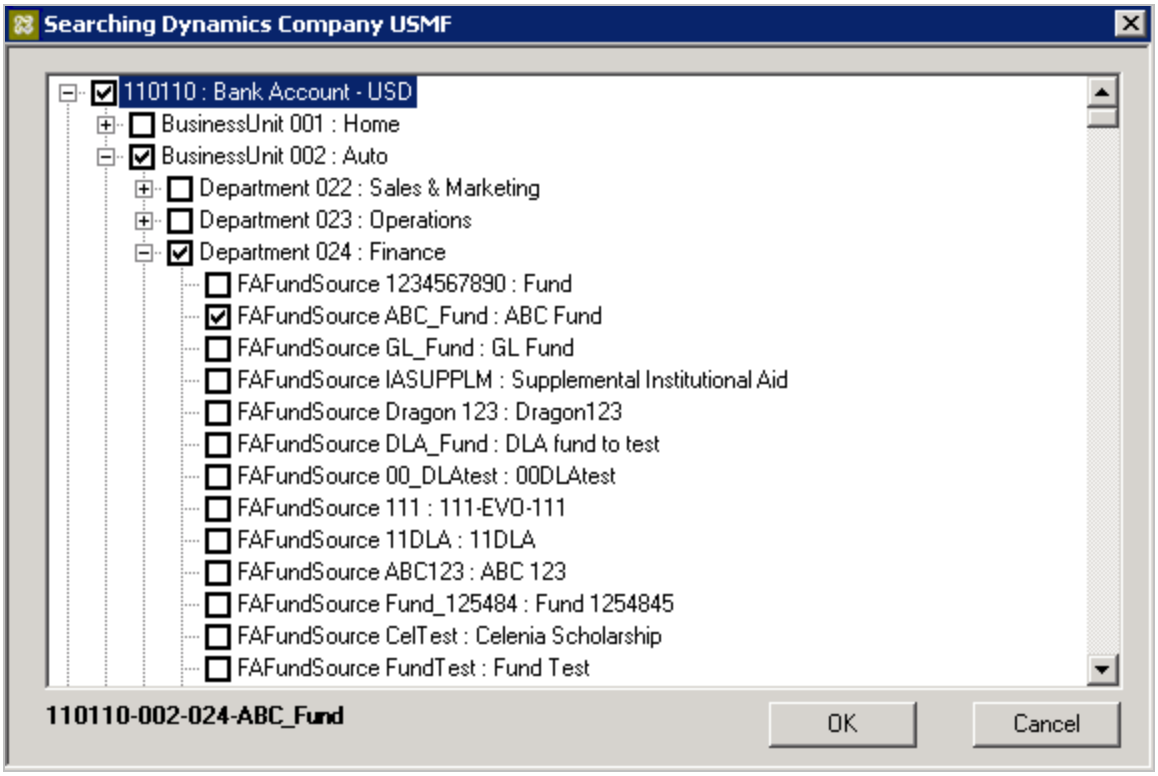
   The **Reset** button on the Search GP GL accounts form clears the fields for a new Search.

- If CampusNexus Student is integrated with CampusVue Finance, HR and Payroll or CampusNexus Finance, HR and Payroll, select a row and click the **Power Search** (for CampusVue Finance, HR and Payroll) or **Select GL Account** (for CampusNexus Finance, HR and Payroll) button to search for the appropriate GL Debit and GL Credit accounts.
  - If using CampusVue Finance, HR & Payroll, select the appropriate Ledger Account and click **OK**.
  - If using CampusNexus Finance, HR & Payroll, select the appropriate dimension attribute and click **OK**.

Note

- Your permissions in the accounting system determine which GL accounts you can view and select in CampusNexus Student.
- The Main account node can be displayed at any level in the account hierarchy. This is based on the account structure setting that is configured in Microsoft AX. For information about this setting, your administrator must see Microsoft AX Help.

When you click **Save** after selecting the account, the system validates your selection against the account structure setting in Microsoft AX. This validation also occurs when transactions are released to G/L.



10. Click **Expand Programs** while you are on a transaction code that you want to split out by program. CampusNexus

Student expands the list to show each program offered by the selected campus. Enter the appropriate debit and credit, and revenue account numbers for each program.

11. Click **Print** to view or print a list of your G/L Link Accounts. The report is in HTML format and looks similar to the following example:

Tran Code	Program	Debit Account	Credit Account	Revenue Account
BOOK	(All)	11000-000	45000-000	
EXAMR	(All)	11000-000	45000-000	
EXTCRSE	(All)	11000-000	45000-000	
EXTLSN	(All)	11000-000	45000-000	
LAB	(All)	11000-000	45000-000	
LESSONR	(All)	11000-000	45000-000	
REG	(All)	11000-000	45000-000	
SFEE	(All)	11000-000	45000-000	
SUP	(All)	11000-000	45000-000	
TOOL	(All)	11000-000	45000-000	
TRAINING	(All)	11000-000	55000-000	45000-000
TUIT	(All)	11000-000	55000-004	45000-000
UNIFORMS	(All)	11000-000	55000-000	45000-000
VEND	(All)	11000-000	45000-000	

12. Click **Save**.

Integrated Accounting

When CampusNexus Student is integrated with an accounting system such as CampusVue Finance, HR & Payroll or CampusNexus Finance, HR & Payroll, all general ledger account references in CampusNexus Student can look up information that is set up in the accounting system in a real-time manner. In CampusNexus Student a user can set up general ledger accounts from a master Chart of Accounts (COA) list and select valid ledger accounts whenever they are needed. The user does not need to know the ledger account numbers from memory, or scan through a printed list. Instead, the information is stored and accessible when needed.

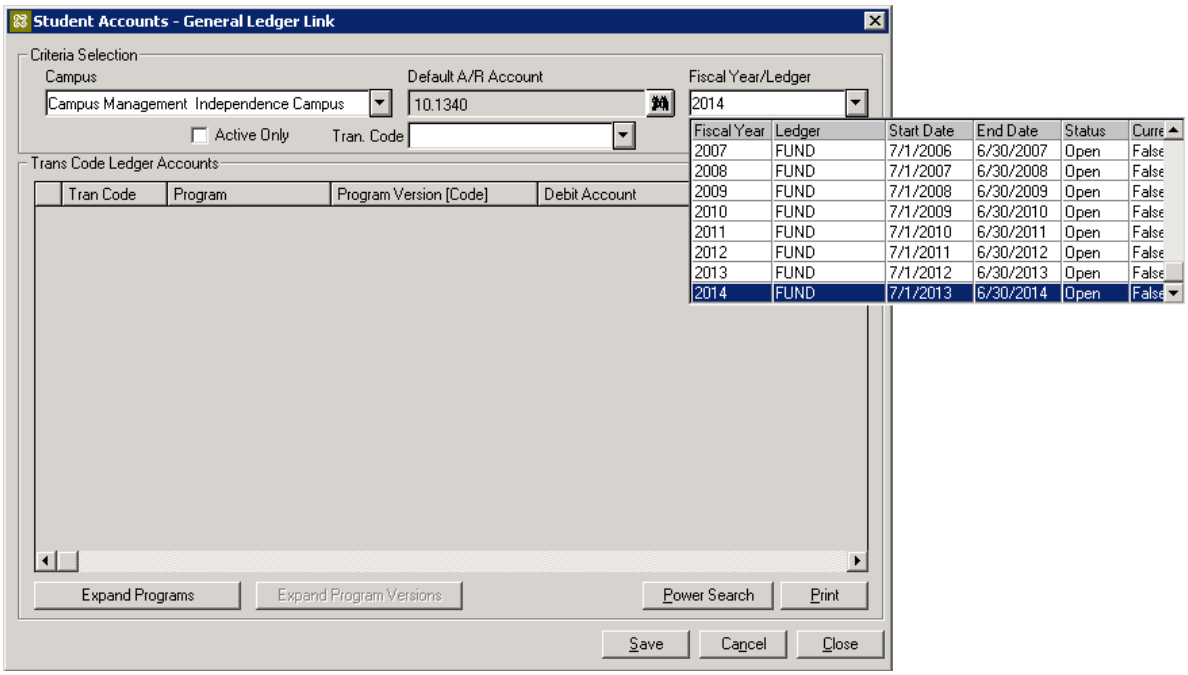
CampusVue Finance, HR & Payroll users can also set up Cost Accounts using the Cost Chart of Accounts. The user can view account information, but cannot save modifications to accounts if they are not in the master Chart of Accounts list. If a GL account number is incorrect, the user can choose a valid account from the list, enter a valid account, or clear an incorrect value.

When CampusNexus Student is integrated with CampusVue Finance, HR & Payroll, the Student Accounts General Ledger Link form includes a Fiscal Year/Ledger list, containing the fiscal years associated with Journal Entry Groups. The fiscal year determines what General Ledger Links the user can configure and which ledger accounts are visible when Power Search is used to link ledger accounts.

If a user is set up as a user in CampusNexus Student and in the accounting system, the security settings in the accounting system determine the GL accounts the user can view and use in CampusNexus Student.

To set up general ledger links when CampusNexus Student is integrated with an accounting system:

1. Navigate to **Setup > Student Accounts**. Select the **Additional** tab.
2. Click **G/L Link**. The Student Accounts - General Ledger Link form is displayed.
3. Select a **Campus**.
4. Select a **Fiscal Year/Ledger**. (CampusVue Finance, HR & Payroll only)



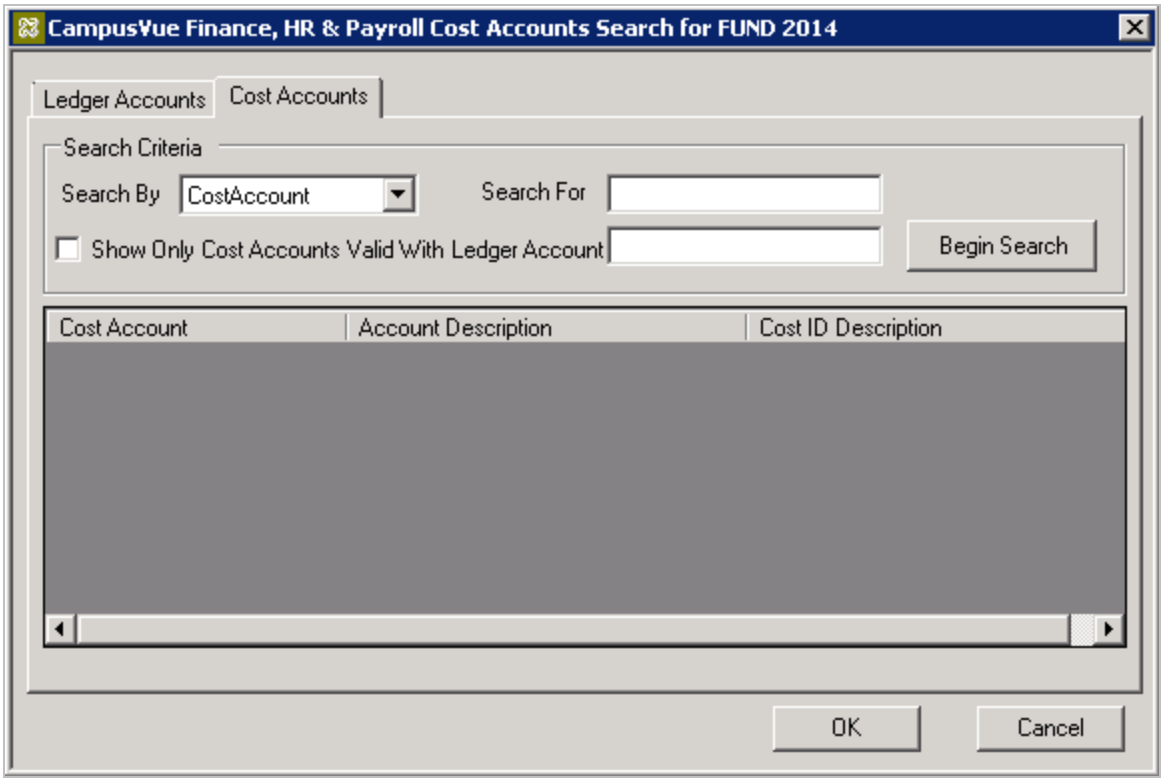
5. Select **Active Only** to see only active Transaction Codes.
6. Select a **Transaction Code**. The grid is populated with the appropriate general ledger record.
7. To search for an account and link the account to the general ledger, click **Power Search** or click **Select GL Account** for CampusNexus Finance, HR & Payroll.

   The power search form is displayed.

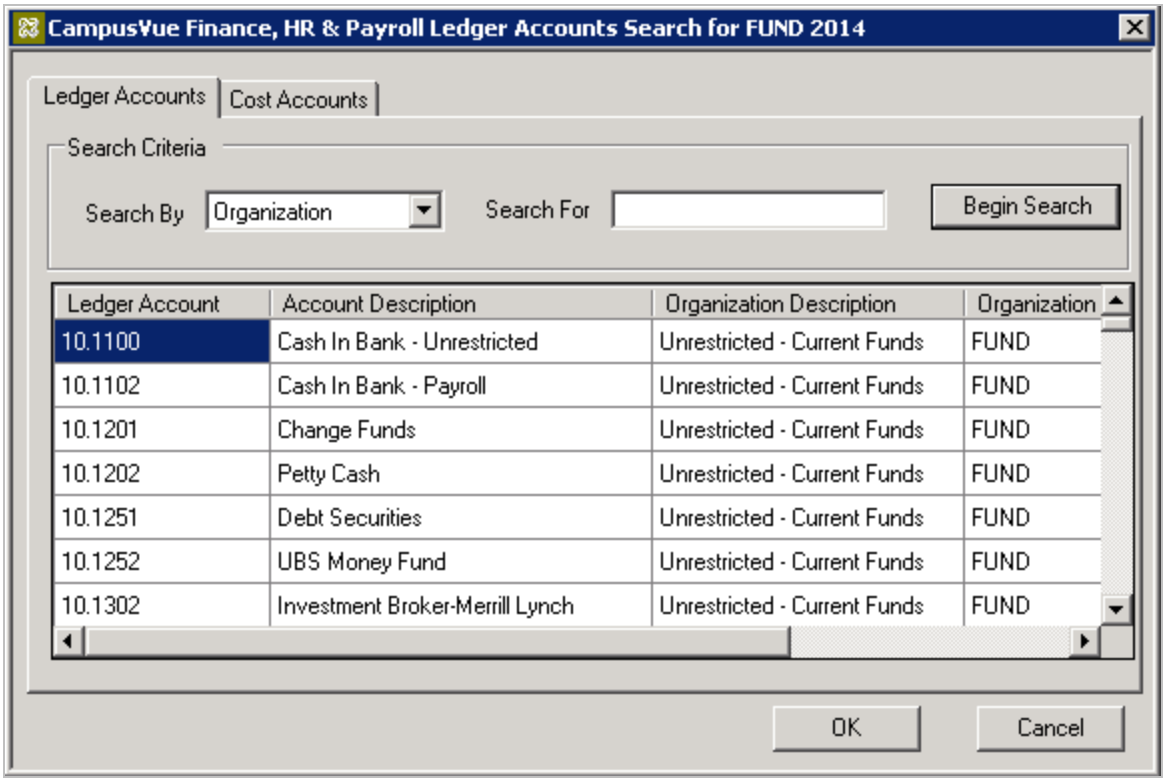
   - Click the **Ledger Accounts** tab to search by *Ledger Account*, *Account*, *Organization*, *Organization Level*, or *Account Description*. (CampusVue Finance, HR & Payroll only)
   - Click the **Cost Accounts** tab to search by *Cost Account*, *Account Description*, or *CostIDDescription*. Limit your search by selecting **Show only Cost Accounts Valid with Ledger Account**. (CampusVue Finance, HR & Payroll only)

   Click **Begin Search**.

   Your security permissions in CampusNexus Student and in the accounting system determine which GL account you can view.



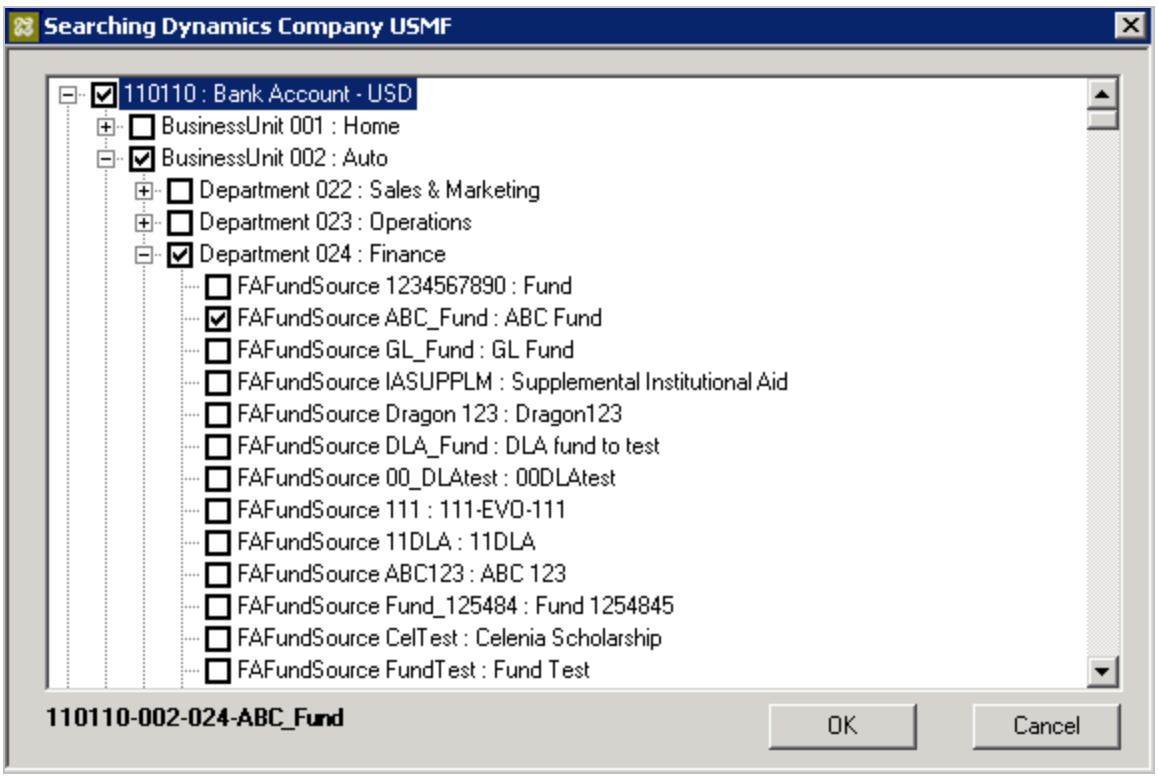
When you click "Begin Search" and leave the "Search For" field blank, CampusNexus Student returns all accounts for the appropriate ledger or cost account. (CampusVue Finance, HR & Payroll only)



If the "Search For" field is populated, CampusNexus Student searches for the entered value only in the column chosen in the "Search By" field and returns the desired record as well as all values that follow that record. For example, if you search by ledger account for 10.1202, the results show 10.1202 and all ledger accounts that come after 10.1202 in ledger account order.

You can use the % wildcard to search more effectively. For example, when you can enter 11% into the "Search For" field, the search returns only accounts that begin with 11.

A hierarchy of account dimensions is displayed with information about the Main Account being displayed at any level in the hierarchy. Expand the dimension at a parent level and then select the appropriate attribute.



Click **OK** after you have made your selection from the search result. The search form is closed.

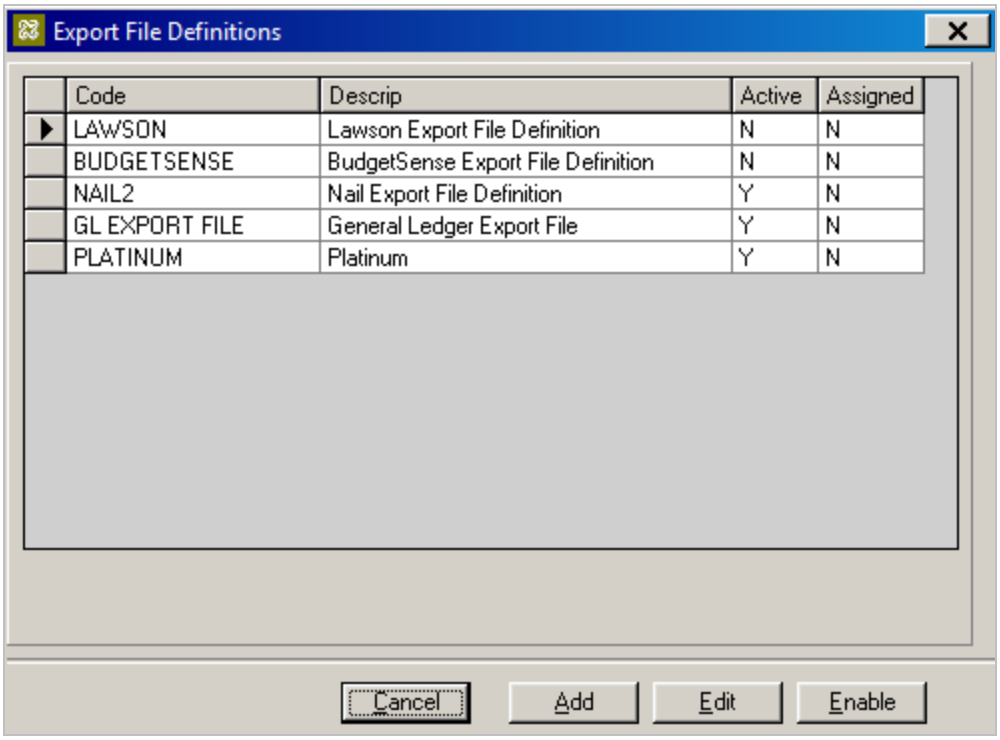
8. Click **Save**.

G/L Export File Definition

Almost all G/L packages can import a file created from an external source that will post journal entry transactions to the General Ledger. In CampusNexus Student you can configure the layout of a flat file that can be produced within the *Release to General Ledger* option. This enables you to define the flat file according to the requirements of your G/L package. Additionally, system administrators can define whether the *Export to Third Party Server* option is to be enabled system-wide, and to set up system-level configuration settings such as transport format and location.

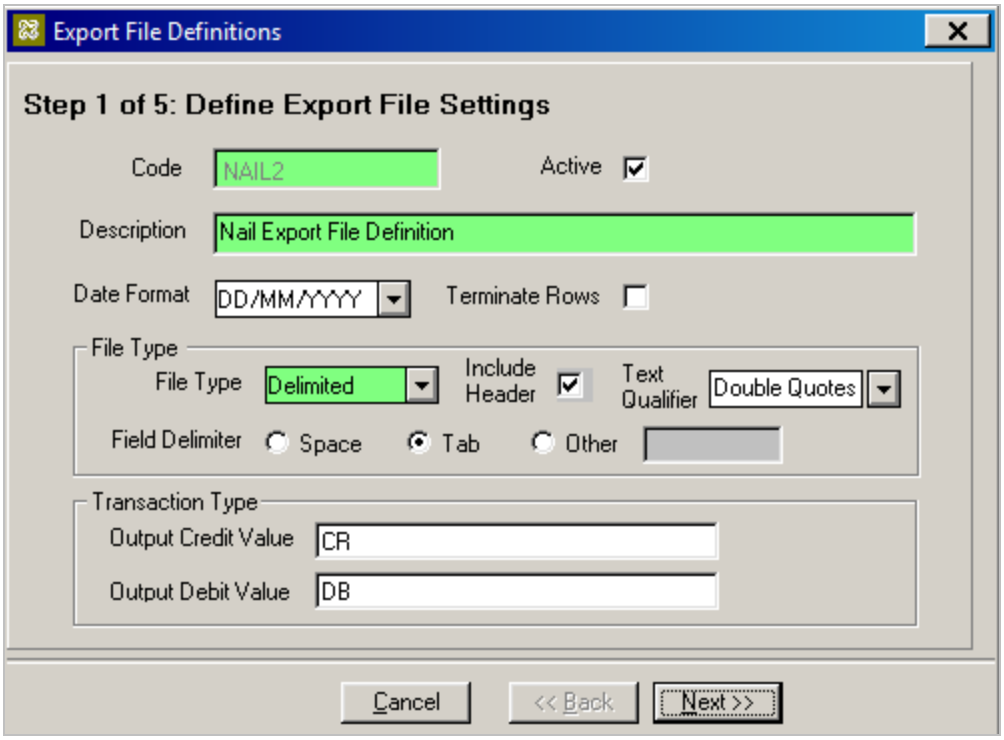
To configure files for export:

1. Navigate to **Setup > Student Accounts**. Select the **Additional** tab.
2. Click **G/L Export File Definition**. The Export File Definitions form is displayed. The form displays Lawson and BudgetSense, the two default export file definitions.
3. To use another accounting package, click **Add**.



4. You must assign **Active** and **Assigned** statuses to the default packages. Active means that the package is available as a choice when you set up Accounting procedures for your school from Setup > Campus Locations > Campus > Accounting tab > G/L Export. Assigned indicates that the package is designated as one your institution uses. Click inside the fields to switch from **Yes** to **No**, for both these options, as required.
5. To see the details of an existing export file definition, a default or one already created by your institution, click **View**. CampusNexus Student displays a read-only wizard with all necessary fields populated.

6. To create a file definition, click **Add**. Step 1 of the Export File Definitions wizard is displayed.

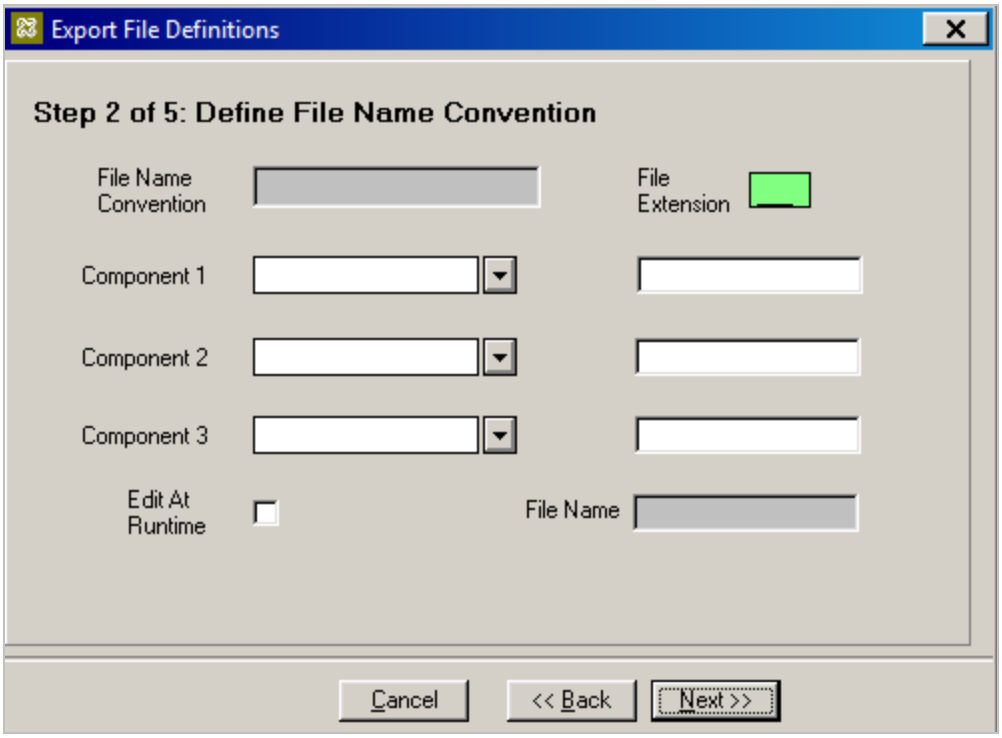


Export File Definitions - Step 1

Field	Description
Code	Specify a Code of up to 16 alphanumeric characters for the export file definition.Choose a Code that is similar to name of the product.
Description	Specify the Description of the export file definition.
Active	Select this check box if the new file definition is Active. If it is Active, it will appear as an option in the Accounting Setup form.
Date Format	Select a format from the drop-down list, for example DD/MM/YYYY. This date format is used in the Release to G/L export file and in the Description field when using a Lawson file type. If you do not select a date format, dates are displayed based on your current Microsoft Windows regional settings.
Terminate Rows	Select this check box if the new file definition requires a carriage return at the end of a record.
File Type	File types are as follows: • **Delimited**: Fields are separated with user-defined characters or sets of characters. • **Fixed Length**: Each field is determined by a configurable number of characters.
Include Header	Select this check box if the name of each field is to be displayed at the top of the file. This option is used for Delimited files only.
Text Qualifier	Select **Single Quotes** or **Double Quotes** to indicate a text field.

Field	Description
Field Delimiter	Select **Space**, **Tab** or **Other**. If you select **Other**, specify the symbol in the text field.
Transaction Type	Specify the abbreviations you will use for Credit and Debit, for example, CR and DB.

7. Click **Next** and enter information in Step 2 as follows:

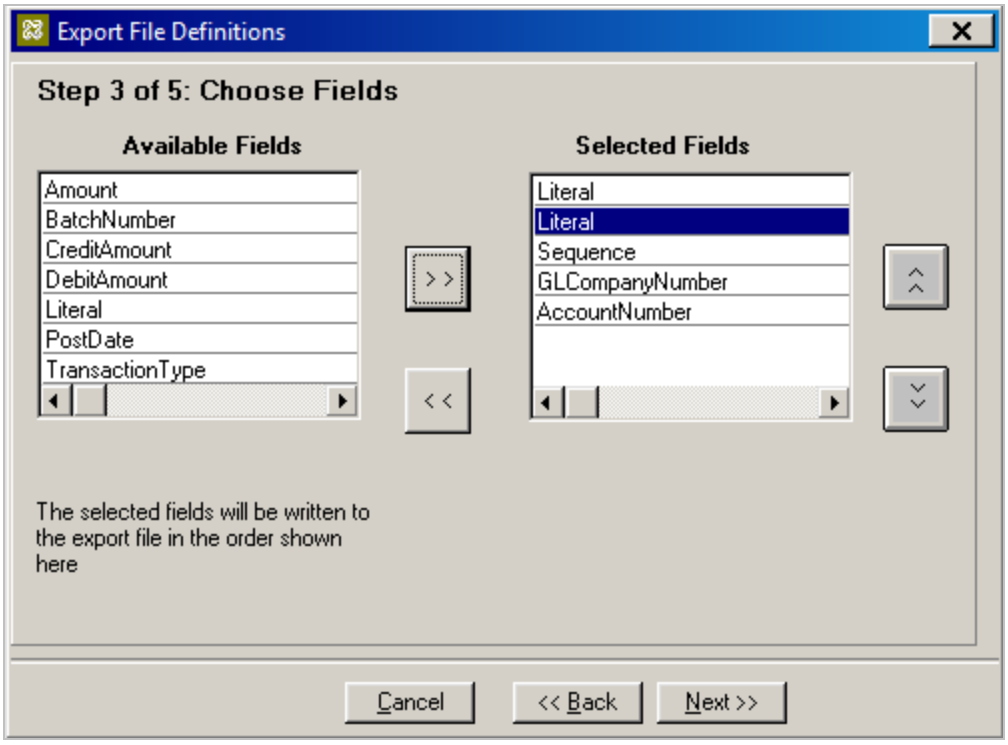


Export File Definitions - Step 2

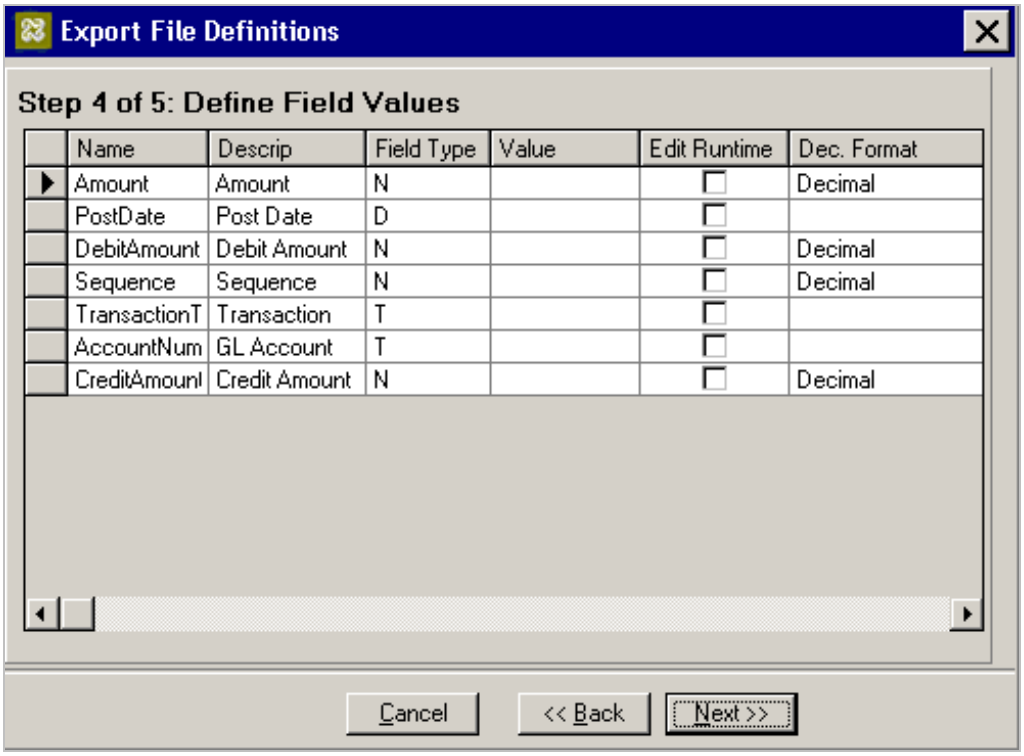
Field	Description
File Name Convention	This read-only field displays Components 1-3.
Components 1-3	Use the drop-down lists to define each of the three components.
Edit at Runtime	If you select this check box,CampusNexus Student will prompt you to enter the file name. If this check box is selected, you cannot set a file extension in this form.
File Extension	Specify a valid file extension.
File Name	Enter the default file name.

8. Click **Next** and enter information in Step 3 as follows:

   a. From the list of available fields, use the horizontal arrows to add fields to and remove fields from the Selected Fields grid. Selected fields are those that will be included in the file.
   b. Use the vertical arrows to change the order of fields, as required. The order of the fields in the Selected Fields grid is the order in which fields will appear in the file.



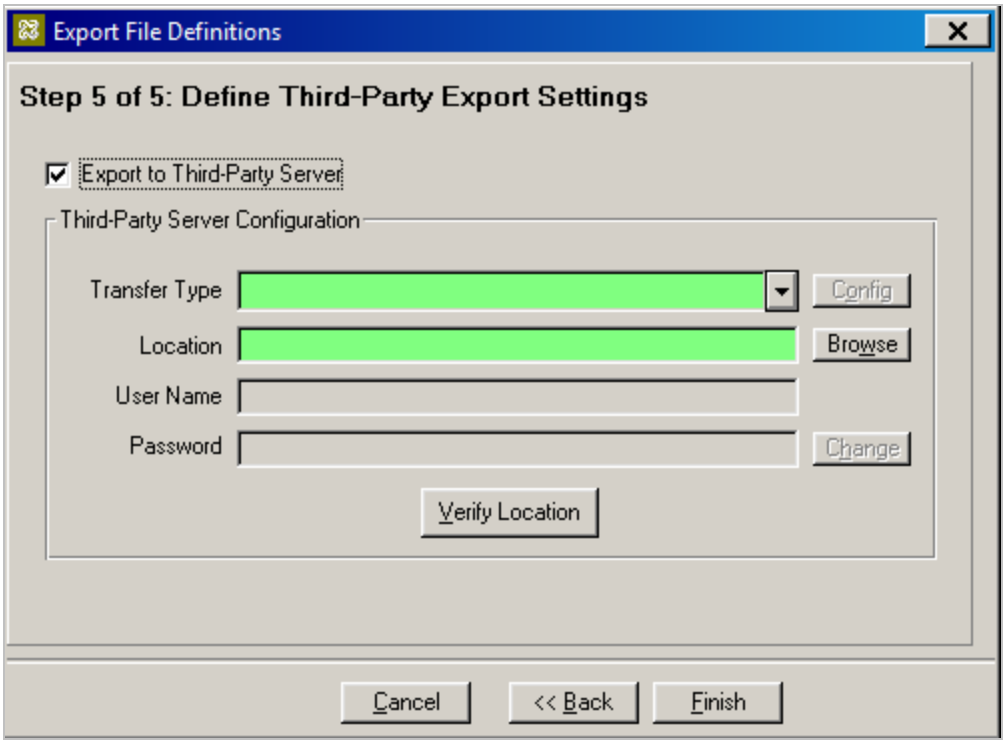
9. Click **Next** and enter information in Step 4 as required. This shows some of the values you have set in previous steps as read-only fields, except for Dec. Format and Dec. Implied.



Export File Definitions - Step 4

Field	Description
Description	This component was set up in Step 2.
Field Type	This is a read-only field except for Literals, set up in Step 2.
Value	This component was set up in Step 2.
Edit Runtime	This check box is selected if you chose to name the file in Step 2.
Dec Format	This field is for numeric values only. Only if the decimal is Included will the file will have the decimal point in the number. Options are **Decimal Included** and **Decimal Implied**. If you choose **Decimal Implied**, the Decimal Implied column becomes enabled.
Dec. Implied	If you selected **Decimal Implied** in the column to the left of this one, specify the number of places from right to left that are required to get the actual value.

10. Click **Next** and enter information in Step 5 (optional) as follows:



Export File Definitions - Step 5

Field	Description
Export to Third-Party Server	Select this check box to export this to a third-party server and complete the configuration by entering information in the fields listed below.

Field	Description
Transfer Type	Select one of the following options: • **Local/Mapped Drive** (for example, H:\folder\subfolder\) • **Network Location** (for example, \\name\folder\subfolder\) • **FTP** (for example, ftp://ftp.sitename.com/folder/subfolder/). If you choose **FTP**, click **Config** to configure the FTP.
Location	Used for local or mapped drives and network location transfer types. Specify a location or click **Browse** to navigate to the location where G/L files that are successfully transmitted will be saved.
User Name	Enter the user name that will be the shared account to access the third-party server and/or software.
Password	Enter the password that will be the shared account to access the third-party server and/or software. Passwords will be encrypted.
Change	Use this field to change the password. When you click **Change**, a new reusable / generic password form is displayed and you are prompted for the old password and the new password. If you are entering a password for the first time, the old password text box is disabled.
Verify Location	Click **Verify Location** to test the configuration. A confirmation notification should be returned. If an error notification is returned, then the export location, the archive location, or the account information could not be verified.

11. Click **Finish** to return to the G/L Export Definition form. Your new file definition is displayed in the grid.

Transaction Code Security

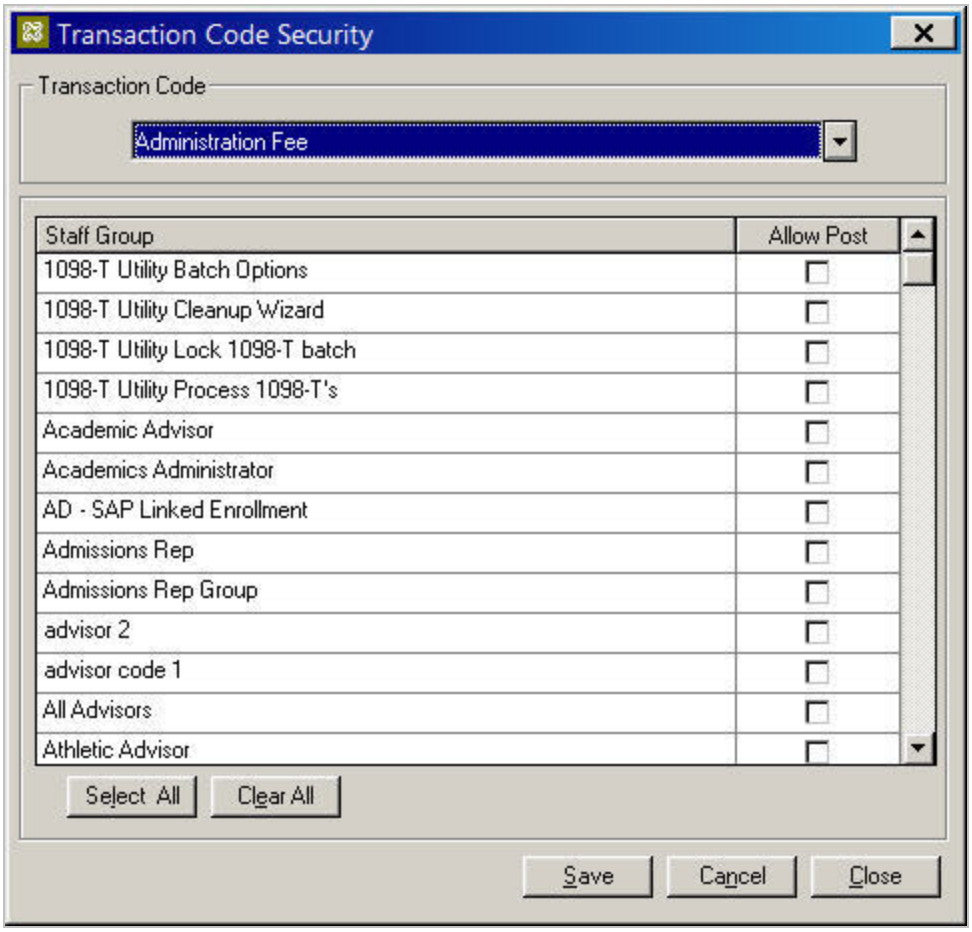
The Transaction Code Security form allows schools to configure transaction code permission to staff groups. The selected staff groups may post the selected transaction code. See also Transaction codes.

CampusNexus Student determines which staff members may access a transaction based on their transaction code security level. Before the transaction code drop-down list is presented to the staff member, CampusNexus Student verifies that the staff member has permission to process the transaction. Additionally, when the staff member clicks on the 'Transaction Search', 'Post Charges', or 'Adjust Transaction' buttons anywhere in the application, the permissions are checked.

Note: Users are often associated with multiple staff groups. It is likely that one staff group linked to a user is allowed to use a transaction code, yet another staff group associated with the same user is not allowed to use a transaction code. In these cases, the "least restrictive" approach is used, meaning that the user is allowed to post to the transaction code if the user is linked to at least one staff group that is allowed to use a particular transaction code.

To configure transaction code security for staff groups:

1. Navigate to **Setup > Student Accounts**. Select the **Additional** tab.
2. Select **Yes** for the Transaction Code Security.
3. Click **Transaction Code Permissions**. The Transaction Code Security form is displayed.



4. Select a **Transaction Code** from the drop-down list.
5. (*Optional*) Click **Select All** to select all staff groups listed.

6. Select the **Allow Post** check box for each staff group that will have permission to post or adjust the selected transaction.
7. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Repeat these steps until all transactions codes have been associated with the intended staff groups.

Setup > Academic Records

When you navigate to Setup > Academic Records, the Academic Records Settings form is displayed. Use this form to configure system wide settings related to academic records. The form contains the following tabs:

- Enrollment
- General
- Hold Codes
- LMS Configuration
- OMR Scanning
- SAP
- Settings
- Transcripts

Additional settings are configured under Lists > Academic Records.

Academic Records Settings - Enrollment Tab

Use the Enrollment tab on the Academic Records Settings form to select optional steps that can be included in the student enrollment process.

The first five options are required:

- Student Selection
- Program Selection
- Term and Billing Method
- Enrollment Dates
- Enrollment Number/Description

Other items are optional:

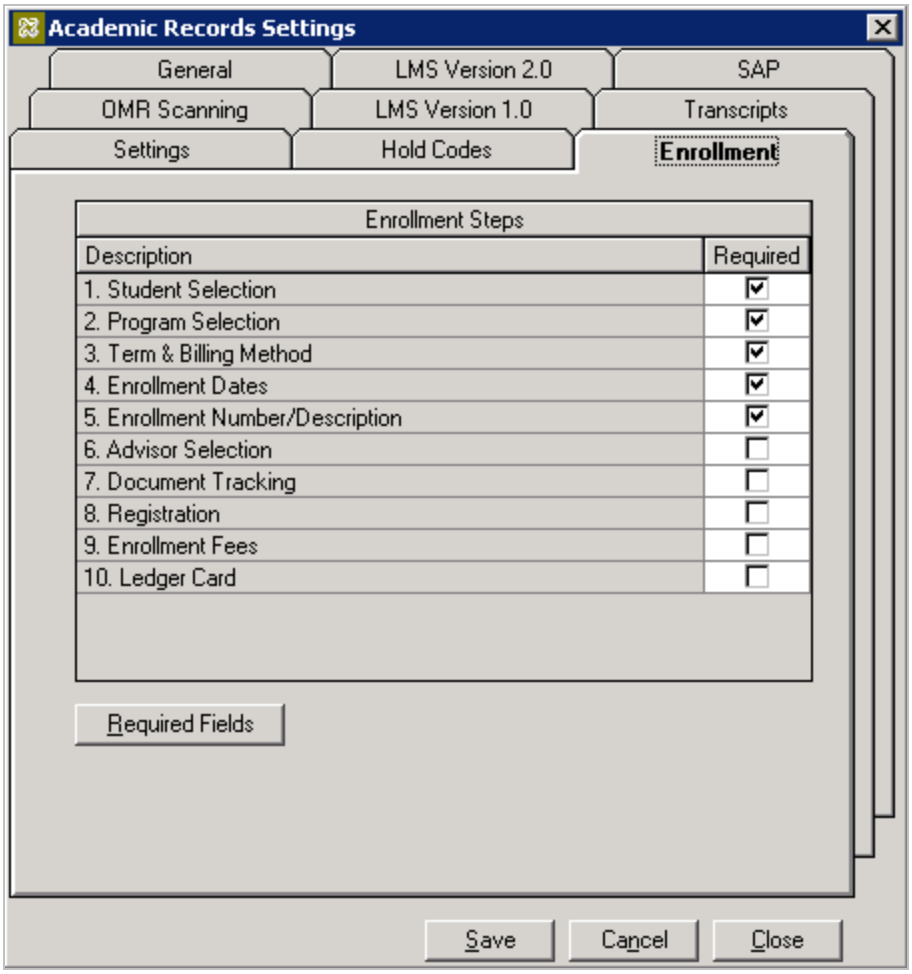
- Document Tracking
- Registration
- Enrollment Fees
- Ledger Card

The Required Fields button enables you to select fields that must be completed in the student master table before enrollment can proceed.

If CampusNexus Student is configured to gather additional information, the optional items are displayed and you cannot exit the enrollment wizard until you have viewed the required forms. You do not need to edit the form, but you must loaded and review the forms.

To select optional steps for the enrollment wizard:

1. Navigate to **Setup** > **Academic Records**. The Academic Records Settings form is displayed. Select the **Enrollment** tab.



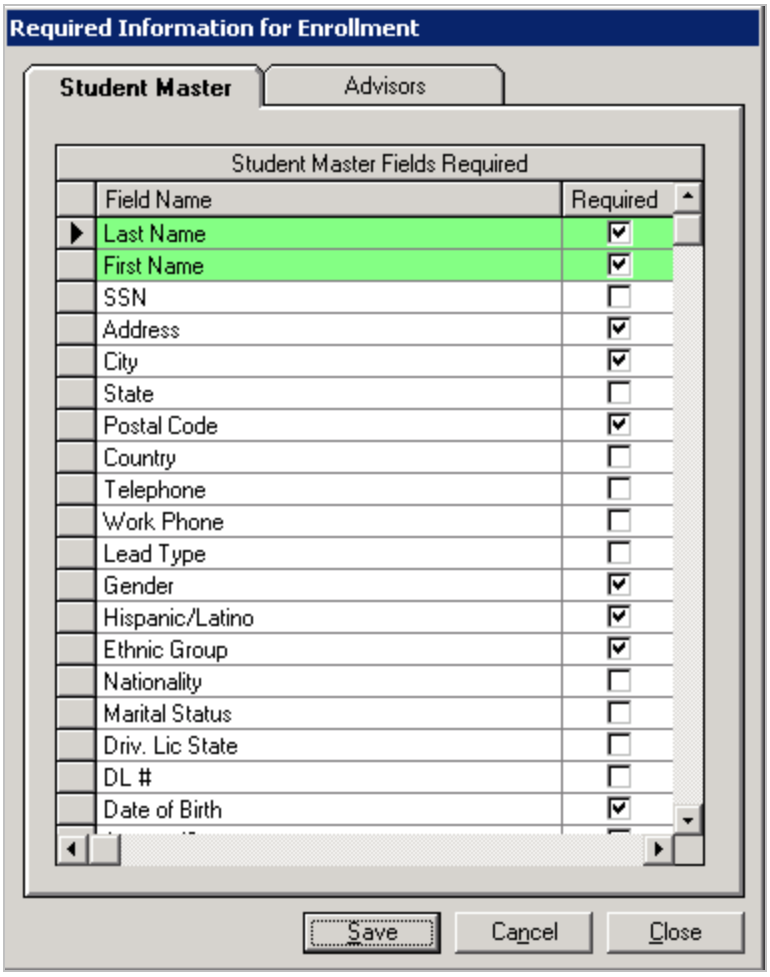
2. Select or clear the **Required** check boxes in rows 6 through 10 as needed. Rows 1 through 5 are required and cannot be cleared.

   Select **6. Advisor Selection** if you want a page added to the enrollment form on which you can select all the student's advisors at the time of enrollment.

   If you clear option 6 on the Enrollment tab, CampusNexus Student automatically clears the Required Advisor Types on the Advisor tab of the Required Information for Enrollment form described below.

3. Click **Save**.

4. Click **Required Fields** to display the Required Information for Enrollment form.



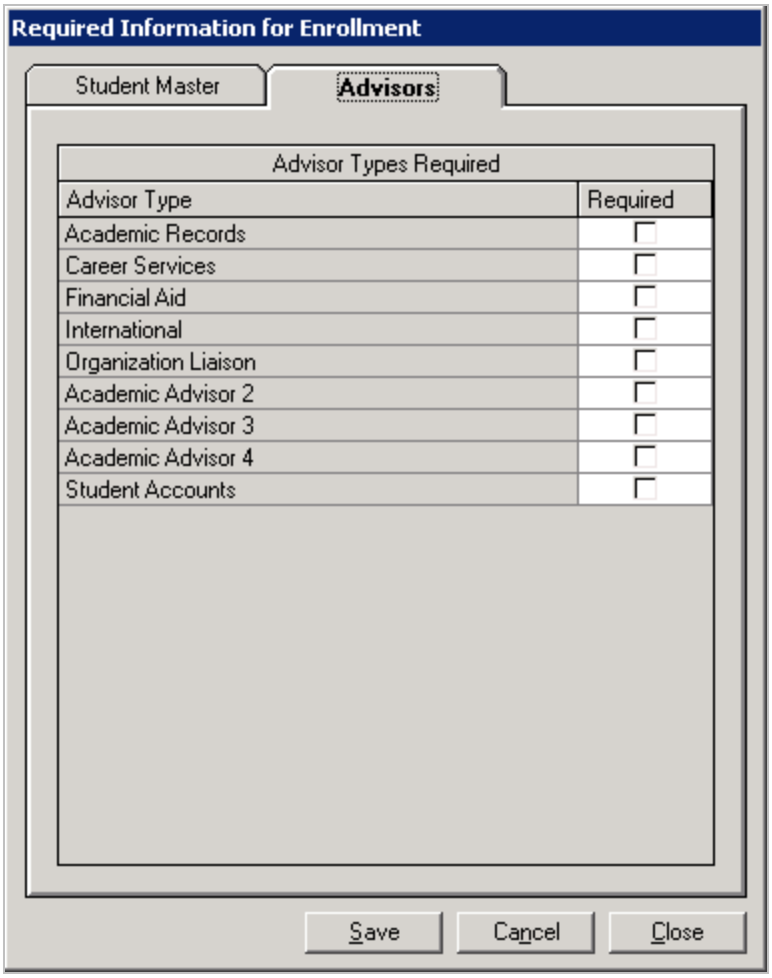
5. On the Student Master tab, select the **Required** check box for each field that you want to designate as a required field on the Student Master form.

   Fields that are not designated as required on the Student Master form can be selected as required for enrollment.

6. Click **Save**.

7. On the Advisors tab, select the **Required** check box for each Advisor Type that you want to designate as a required field at the time of enrollment.

   When you select Required Advisor Types on this form, CampusNexus Student automatically selects option 6. Advisor Selection on the Enrollment tab.



8. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Academic Records Settings - General Tab

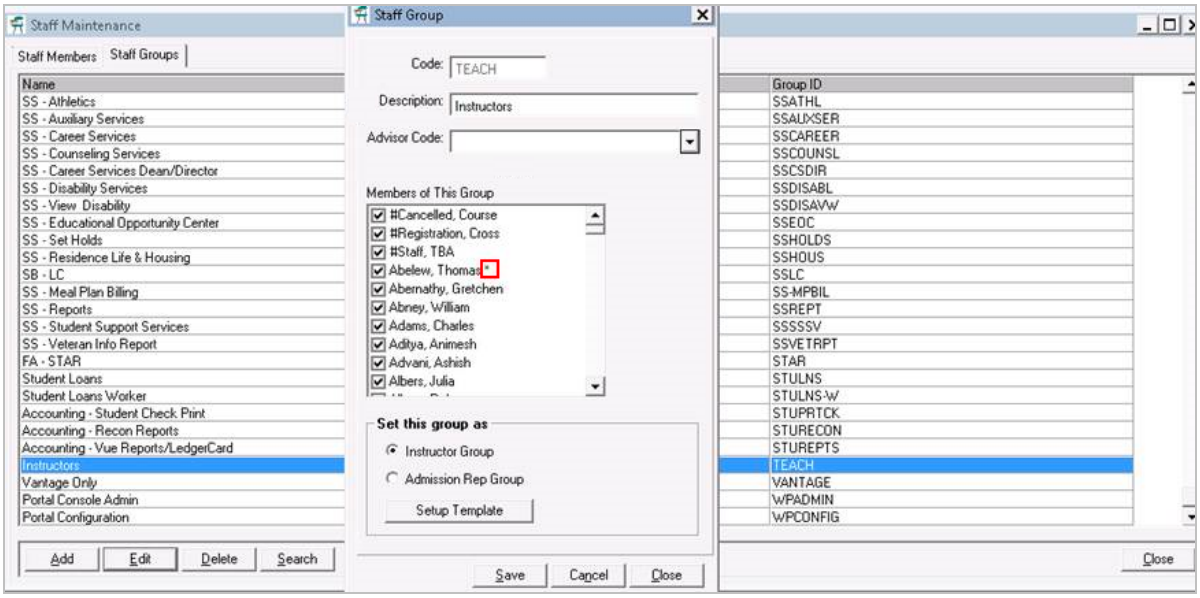
Use the General tab of the Academic Records Settings form to configure the following:

- Staff groups with permissions to modify a student's Last Day Attended (LDA) when changing a student's status to Drop. Depending on the setting, LDA changes are permitted or prevented when changing the student's enrollment status (Daily > Academic Records > Status Change) or batch status (Daily > Academic Records > Batch Status Change).
- Faculty Management Integration for CampusNexus Finance, HR & Payroll. This global option is available only if integration with CampusNexus Finance, HR & Payroll is enabled (see GL/AP Package). Faculty Management Integration enables you to synchronize instructor information for Campus Groups set up under Central Security in CampusNexus Student with CampusNexus Finance, HR & Payroll in all corresponding legal entities. When Faculty Management Integration is enabled, the following properties are synchronized between CampusNexus Student and CampusNexus Finance, HR & Payroll whenever associated data is created or updated in either system:
    - First Name
    - Last Name
    - Address
    - Phone Numbers
    - Email addresses
    - Employee ID
    - Active status

  If the global Faculty Management Integration option is enabled, you cannot edit information that originated from CampusNexus Finance, HR & Payroll in the Staff Maintenance form of CampusNexus Student.

  The global Faculty Management Integration option can be used in conjunction with the campus-level Faculty Management Integration option on the Others subtab of the Campus Information - Academic Records tab. The campus-level integration option enables you to limit the synchronization of faculty data to specific campuses.

  An Instructor created in CampusNexus Finance, HR & Payroll is created as an Instructor in CampusNexus Student but is not associated with any Campus Groups. An Instructor who does not have an association with a Campus Group is marked with a visual indicator (*) as shown below:

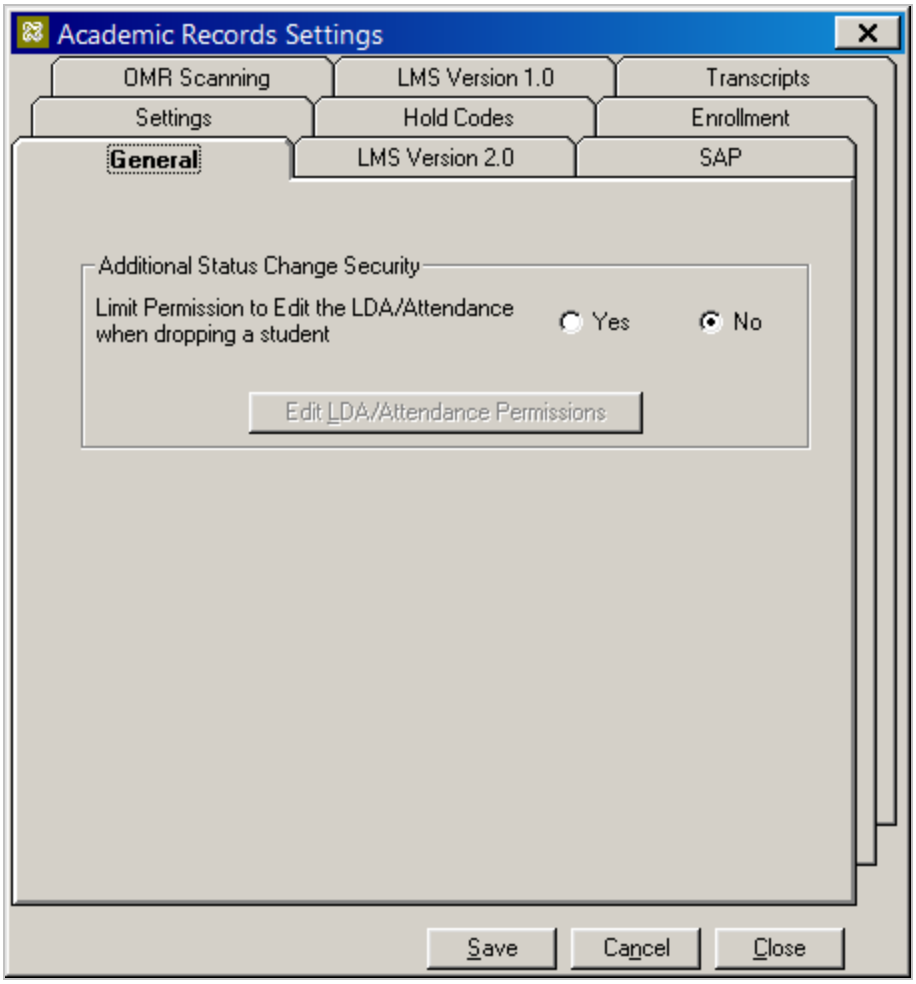


When the Campus Group is assigned to the Instructor in CampusNexus Student, the related Campuses are sent to CampusNexus Finance, HR & Payroll and are updated for that Instructor.

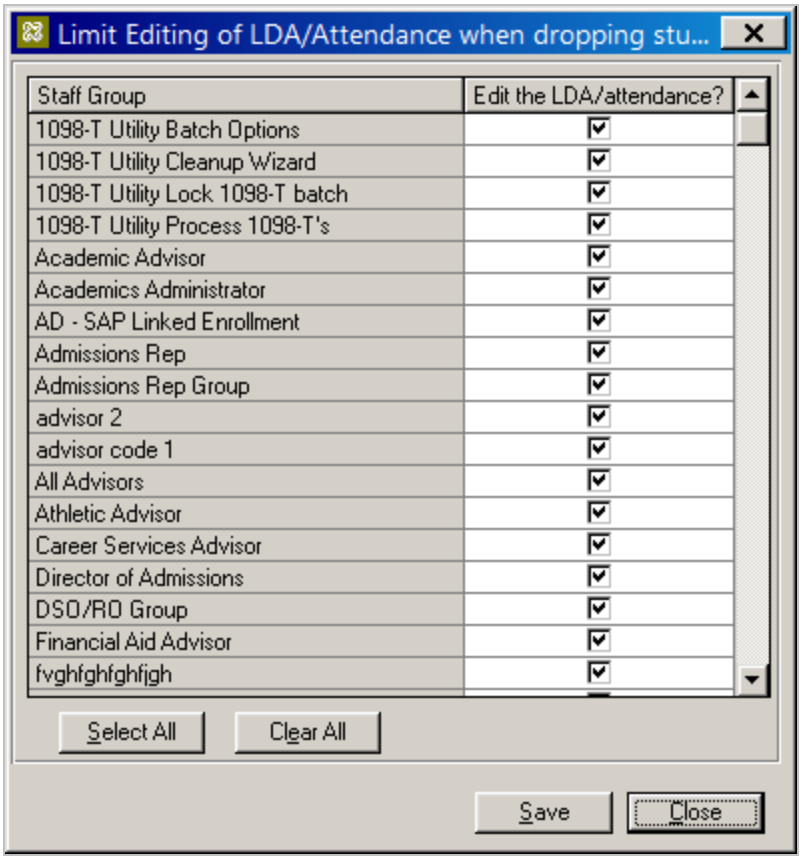
When the global Faculty Management Integration option is enabled, you cannot create Instructors directly in CampusNexus Student. Hence, when an instructor Group is assigned to a Staff created in CampusNexus Student, the following message is displayed: "*Cannot create Instructor. The Instructor must be created in the Faculty Management or HR module of CampusNexus Finance, HR & Payroll.*"

To set permissions for changing the LDA:

1. Navigate to **Setup** > **Academic Records**. The Academic Records Settings form is displayed. Select the **General** tab.



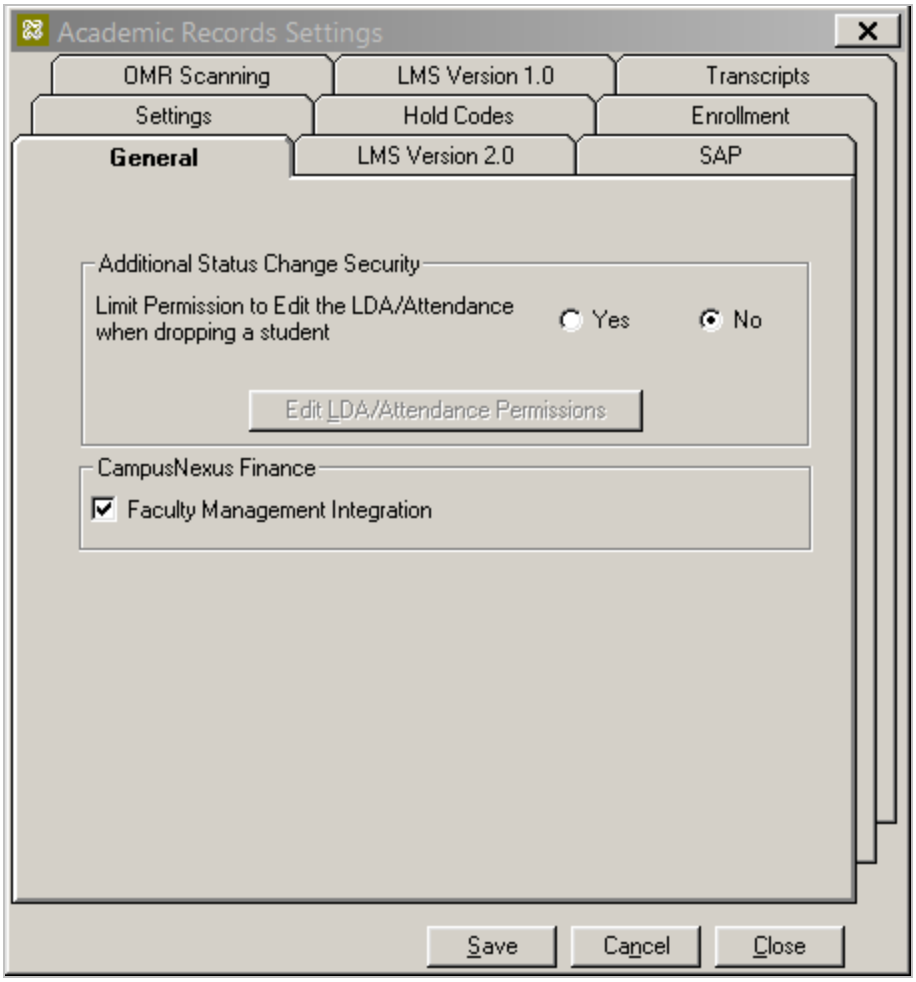
2. Select **Yes** for the Limit Permission to Edit the LDA/Attendance when dropping a student option. The Edit LDA/Attendance Permissions button is enabled.
3. Click **Edit LDA/Attendance Permissions**. The Limit Editing of LDA/Attendance when dropping student form is displayed.
4. Select or clear the check boxes in the **Edit the LDA/attendance?** column associated with each staff group to allow or deny each staff group to alter the LDA. Click **Select All** to allow access permissions to all staff groups or **Clear All** to deny permissions to all the listed staff groups.



5. Click **Save**.
6. Click **Close** to close the form.
7. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

To enable Faculty Management Integration:

1. Navigate to **Setup** > **Academic Records**. The Academic Records Settings form is displayed. Select the **General** tab.



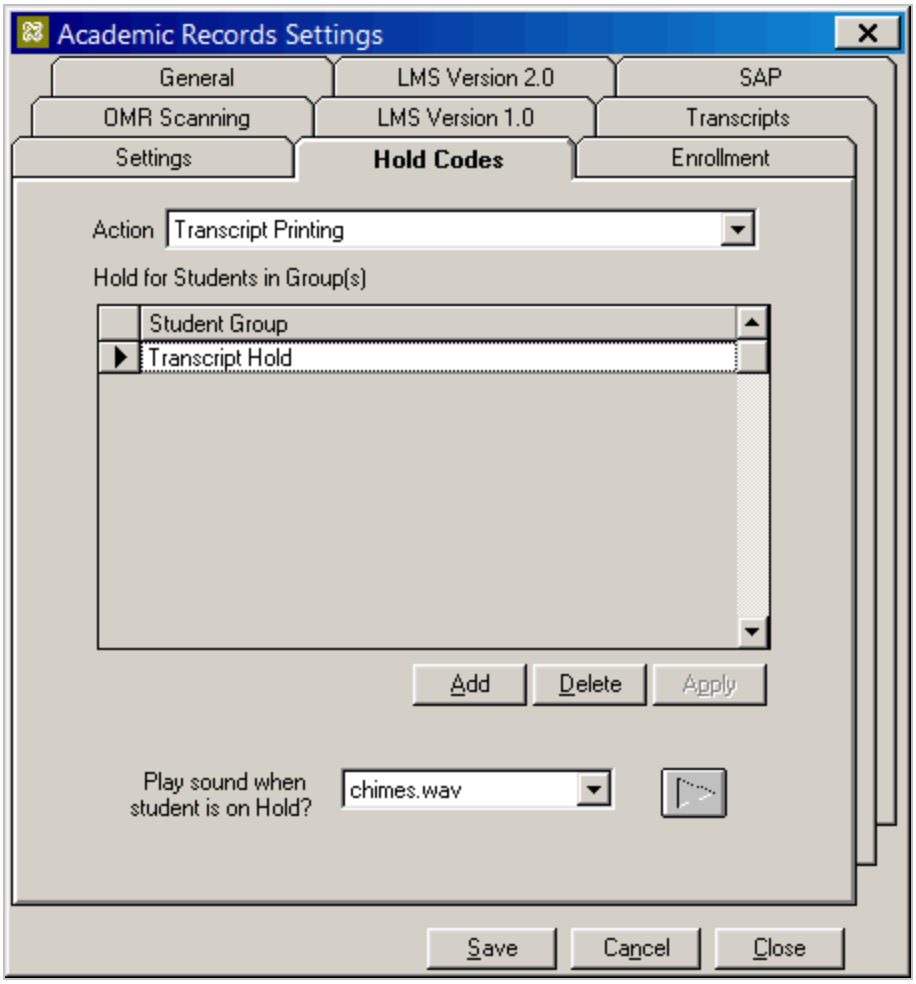
2. Select the **Faculty Management Integration** option.
3. Click **Save**.
4. Click **Close** to close the form.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Academic Records Settings - Hold Codes Tab

You can set up hold codes based on student groups. In this scenario, if a student belongs to a selected group, the student is prevented from registering in class sections or from having transcripts printed. Class registration are prevented on both the View > Academic Records > Schedule and Daily > Academic Records > Registration forms.

To set up a hold codes:

1. Navigate to **Setup** > **Academic Records**. The Academic Records Settings form is displayed. Select the **Hold Codes** tab.



2. Select the **Action** to be blocked:

Field Descriptions

Action	Description
Registration	Prevents the student from registering for courses.

Action	Description
Transcript Printing	Prevent transcripts for the student from being sent from the campus. The transcript printing hold prevents the transcript from being printed from the View > Academic Records > Final Grades form. It does not prevent a transcript from being printed from the Reports > Academic Records > Transcript option.
Online Schedule	Prevents students from accessing their class schedule online.
Academic Graduation	Prevents changing the student's status from enrollment to graduation.
Student Print Schedule	Prevents a student's schedule from being printed from the student schedule form. It is used to put a student on an academics schedule hold so that the student's schedule cannot be printed from Student Bar > Academics Record > Schedule > Print; however, it can still be printed via the Reports > Academic Records > Student Schedule (provided the user has the proper privileges). The Hold Light indicator changes to red to indicate that a student is on hold, and the description of the hold light is presented indicating that the student is on Print Schedule Hold.
Bookstore	Prevents students from ordering books. The Bookstore hold flag is transmitted along with each student's data record to indicate to the bookstore vendor not to supply books for the applicable student.

3. Click **Add** to select a Student Group to associate with the Action. A blank line is displayed in the Hold for Students in Group(s) grid.

   Note: Private Hold Groups in the Groups for Student form can be viewed, but editing of those groups is allowed by the owner of that group or the system administrator only.

4. Click in the blank line and click to select a student group.

5. If you want a sound to be played when the student master for a student on hold is displayed, select a sound (.wav) file from the **Play sound when student is on Hold?** list.

   Click the **Play** button to hear the selected wave file.

   Sound files must be stored in the CampusNexus Student shared folder in the sounds subfolder. Sample ".wav" files are included. You can customize your "hold" sounds by placing additional ".wav" files into the CampusNexus Student share/sounds folder. (The sound feature may not be available on schools using Citrix or terminal servers.)

   When working with student records, the hold sounds will be audible only when the student's master record is opened.

6. Click **Apply** to save your hold code selections.

7. Click **Delete** to remove a group from the list of hold groups.

8. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

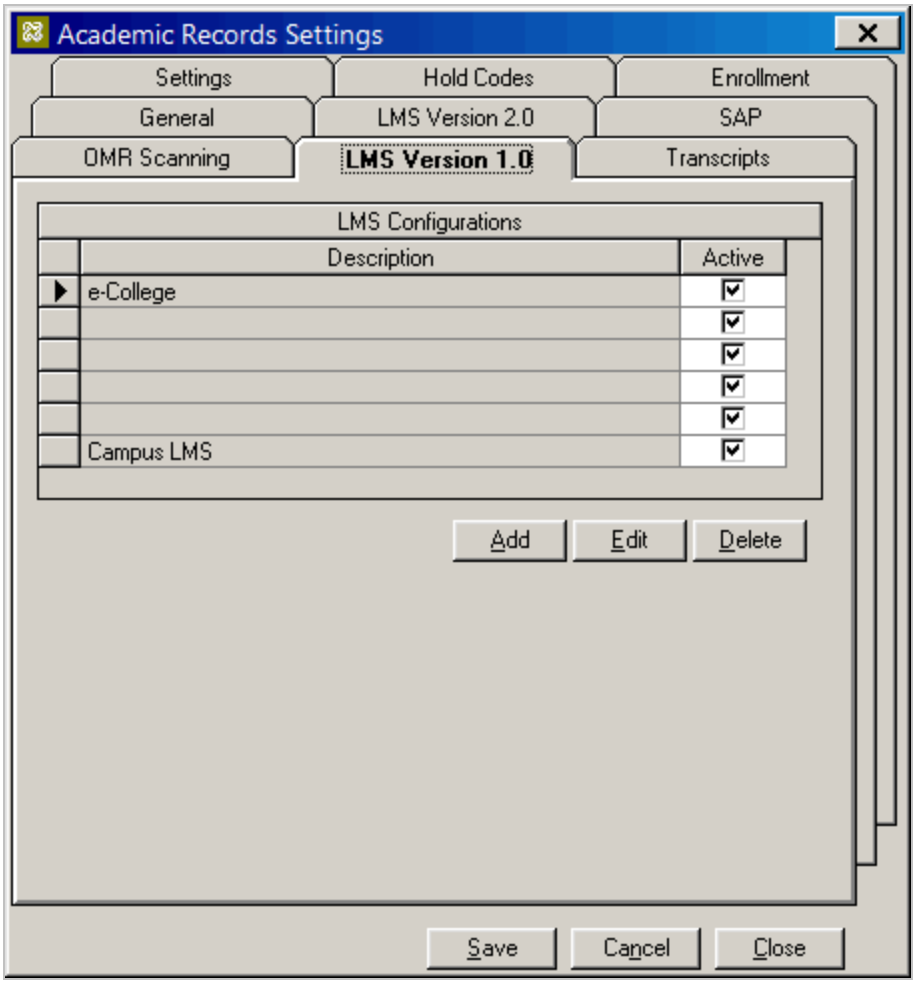
Academic Records Settings - LMS Configuration Tab

Use the LMS Version 1.0 and 2.0 tabs on the Academic Records Settings form to configure the Learning Management System (LMS).

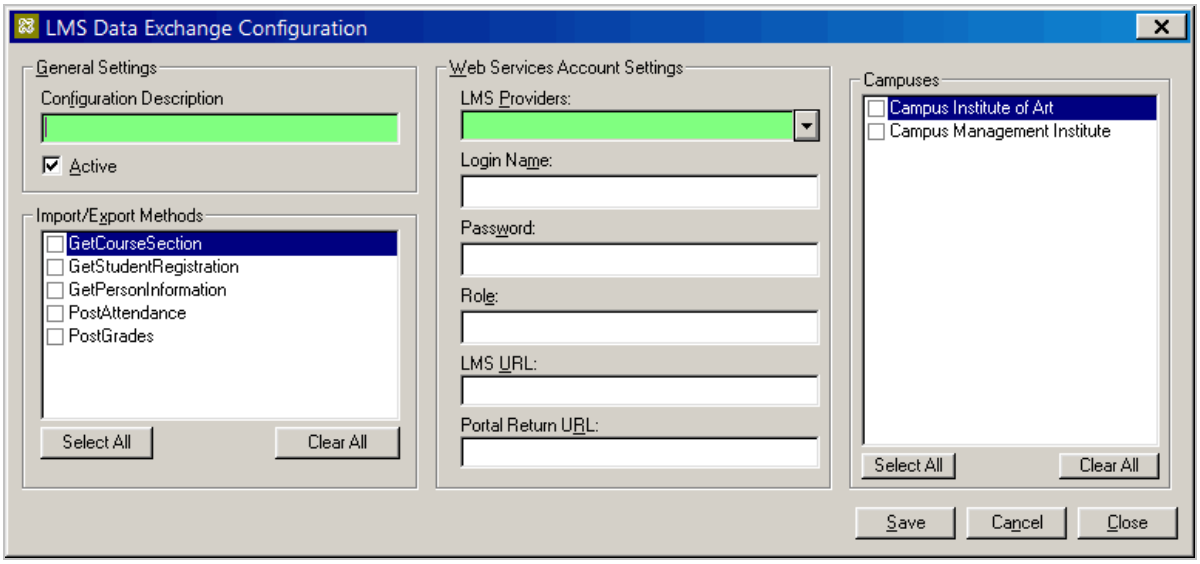
- On the LMS Version 1.0 tab, configure the LMS Data Exchange.
- On the LMS Version 2.0 tab, configure the LMS Vendor.

To configure the LMS Data Exchange:

1. Navigate to **Setup** > **Academic Records**. The Academic Records Settings form is displayed. Select the **LMS Version 1.0** tab.



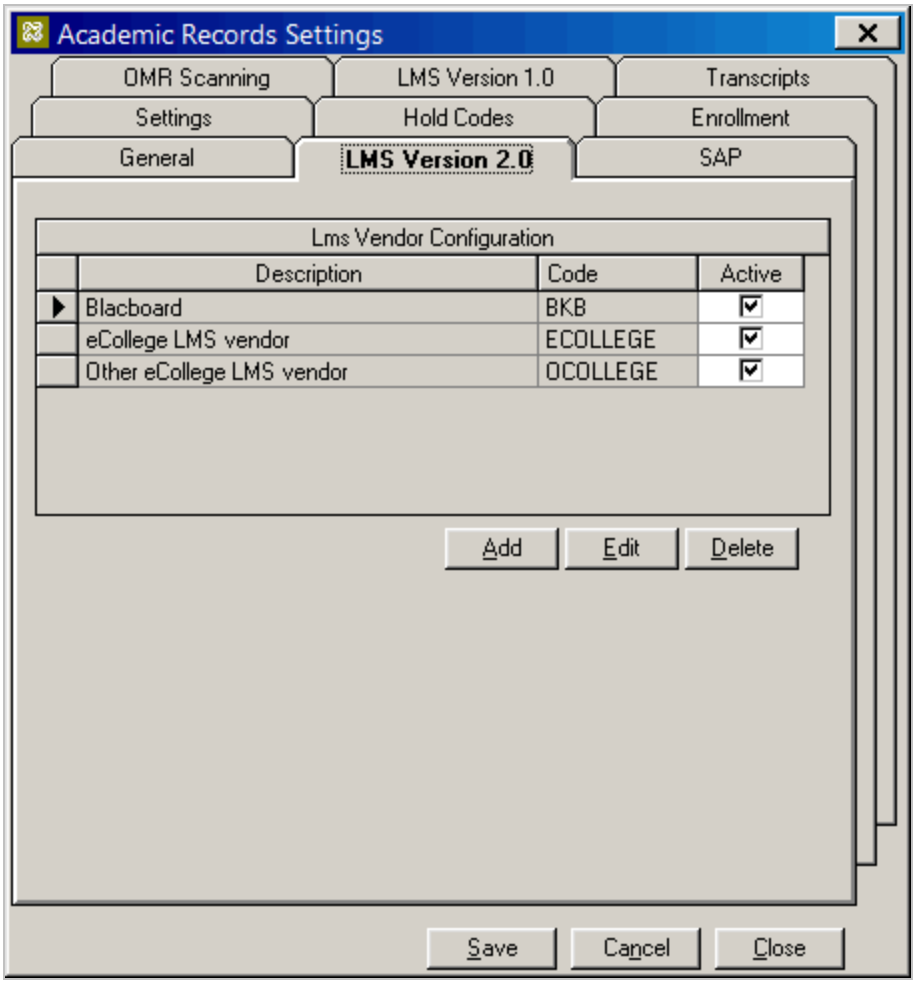
2. Click **Add**, or select a record and click **Edit**. The LMS Data Exchange Configuration form is displayed.



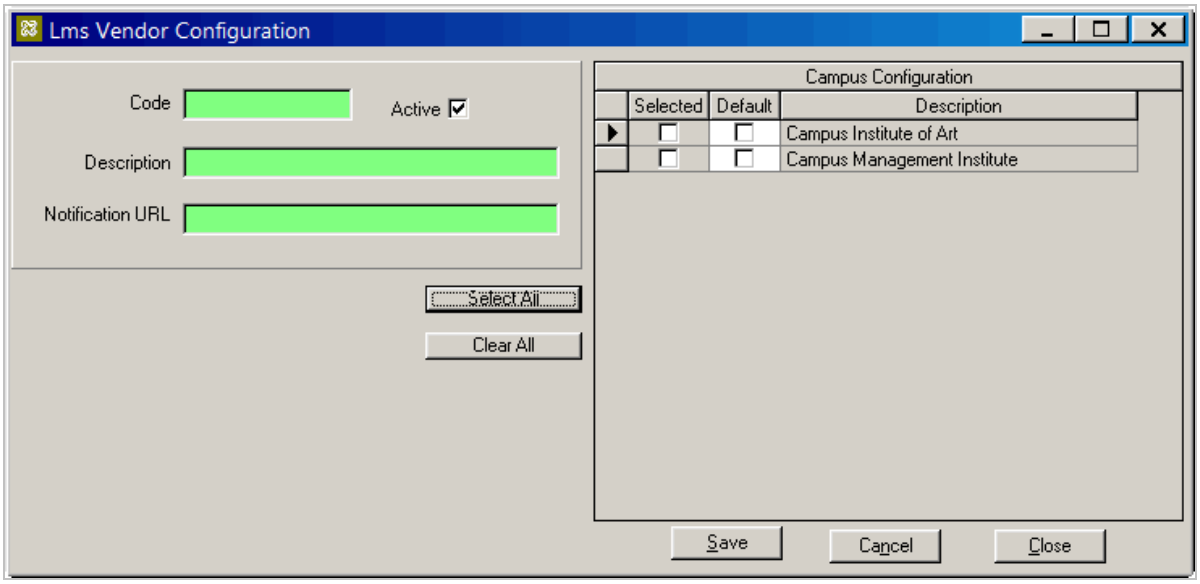
3. In the **Configuration Description** field, specify a unique description to identify this configuration.
4. Select the **Import/Export Methods** to be used for this configuration.
5. From the **LMS Providers** list, select the LMS provider.
6. Specify the **Login Name** used for this provider. Enter the name exactly as it is used to log into the LMS provider account.
7. Specify the **Password** used for the login name above.
8. Specify the **Role** for this account.
9. Specify the **LMS URL** for this account.
10. Specify the **Portal Return URL** for this account.
11. Select the **Campuses** that will use this configuration.
12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

To configure the LMS Vendor:

1. Navigate to **Setup** > **Academic Records**. The Academic Records Settings form is displayed. Select the **LMS Version 2.0** tab.



2. Click **Add**, or select a record and click **Edit**. The **LMS Vendor Configuration** form is displayed.



3. Specify a unique **Code**.

4. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
5. Enter a **Description**.
6. In the **Notification URL** field, enter any text. This field cannot be left blank.
7. In the **Campus Configuration** area, select the applicable check boxes.
8. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Academic Records Settings - OMR Scanning Tab

Use the OMR Scanning tab on the Academic Records Settings form to configure CampusNexus Student for scanning of printed and marked class section rosters containing attendance and final grades. The forms, manufactured by SCANTRON™, are used by CampusNexus Student to print class section rosters, which are then read by the ScanMark™ Optical Mark Reader (OMR) or an NCS Pearson device. CampusNexus Student accepts data from the OMR during the scanning procedure and updates student records with the attendance and grade data.

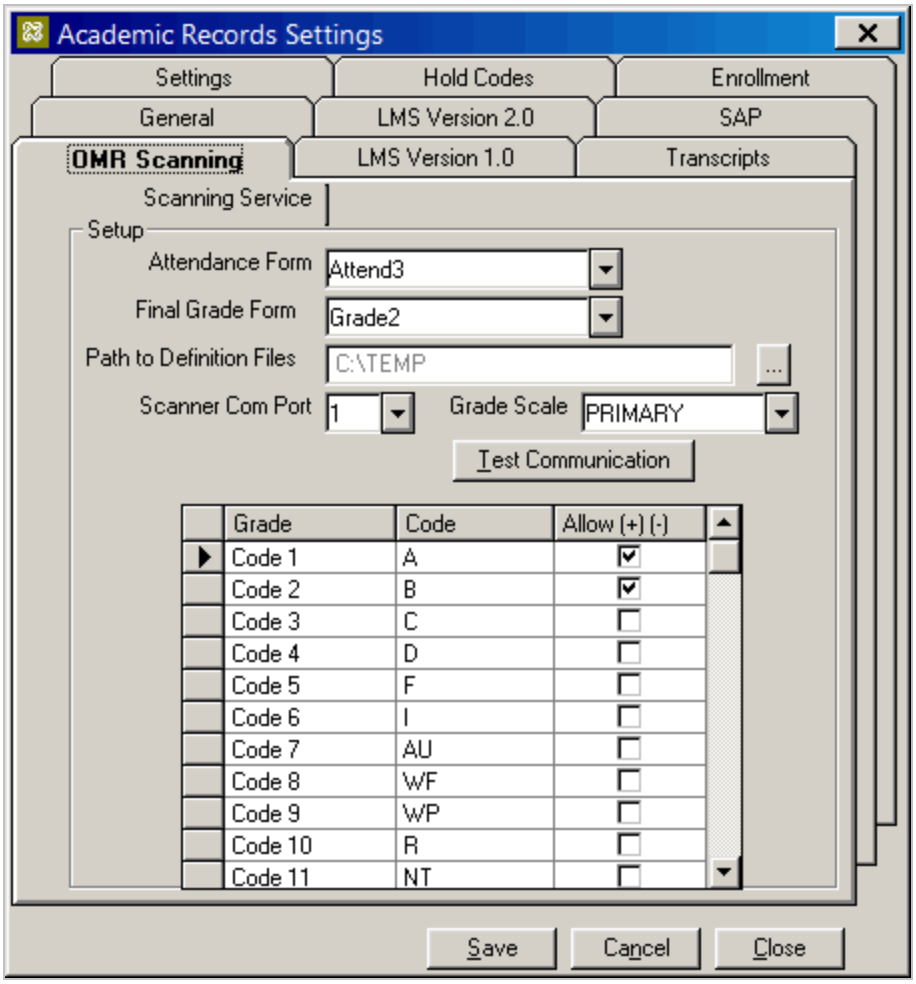
SCANTRON™ and ScanMark™ are registered trademarks of SCANTRON Corporation.

Note: Please read "Scantron Overview" for an overall review of the CampusNexus Student/SCANTRON™ Interface.

For this system to work, you must provide the information on the setup form. See also Test Communication button.

To enter the Scantron system settings:

1. Navigate to **Setup** > **Academic Records**. The Academic Records Settings form is displayed. Select the **OMR Scanning** tab.



2. Select the **Scanning Service**.
3. Select an **Attendance Form**. Multiple forms are printed for class sections having more than the number of

students that can be printed on one form.

- Form No. F-10873-CMC-L. In addition to the class section identification data, this form contains 45 roster lines, each of which is formatted with 9 columns of attendance data. Each column contains 2 bubbles, one for absent and one for tardy. A student is assumed to be present if no bubble is marked for a given date on the form. Use of this form requires that you enter a value in the **Tardiness Absent Percent** field. For instance, a 10 entered in this field indicates that you will deduct 10 percent of the class meeting time from the minutes scheduled when marking a student as tardy. Values in this field can have two decimal places, i.e., 12.25 is twelve and one quarter percent.
- Form No. F-15174-CMC-L. This form is similar to the F-10873-CMC-L form. The principal difference is that it has a Present column for each meeting date. It contains data for 46 students and 7 meeting dates. The instructor must mark each student listed on the form as present, absent, or tardy. You must enter a percentage in the **Tardiness Absent Percent** field for use in calculating minutes to be deducted from scheduled class time.
- Form No. F-15175-CMC-L. This form can contain data for 22 students and 5 meeting dates. For this form, you must set up a code table to represent the bubbles on the form. You can designate meanings for 10 bubbles for each student. You can code a bubble to mean present, absent, excused absence, and/or several degrees of tardiness.

  Example:

  - Attendance Code 1, representing bubble number 1 on the form, can be set up to indicate that the student is present in class.
  - Code 2 can indicate that the student is absent.
  - Code 3 can indicate that the student's absence was excused.
  - Code 4 can indicate that the student was 10 minutes tardy.
  - Code 5 can indicate 20 minutes tardy.
  - Code 6 can indicate 40 minutes tardy, and so on.

  You can only enter values in the Minutes Tardy column on rows that have been selected as Tardy. The codes you set up are printed at the bottom of the form for easy reference by the instructors.

  Keep in mind that the same table values apply to all class sections regardless of their duration in minutes. A 60 minute class and a 120 minute class will be treated the same. A mark in the Code 4 bubble on the form means 10 minutes tardy in both classes.

  Click **Save** after you set up or change your code table.

4. Select a **Final Grade Form**. Multiple forms are printed for class sections having more than the number of students that can be printed on one form.

   - Form No. F-10871-CMC-L. On this form, the grading options are preprinted. The form contains rows for 45 students. Your grading scale must contain these 13 grading options, or you must require that the instructors not use the grades that are not in your grading scale. The grades on the form are A, A-, B+, B, B-, C+, C, C-, D, F, I, W, and P.
   - Form No. F-15173-CMC-L. This grading form may be used for midterm or final grades. The form contains rows for 45 students. If you do use it for midterm grades, each class section to be graded must have a lesson defined with a code of MIDTERM. The form contains twelve columns for grades and columns to indicate plus (+) or minus (-).

5. Use the **Grade**, **Code**, and **Allow (+)(-)** grid to assign your grading scale to the bubbles on the form. Code 1 represents bubble number 1, Code 2 represents bubble number 2, and so on. Click in the Code column and click

to select a grade. The grades come from the grading scale you select. If a grade has plus or minus suffixes in the grading scale, CampusNexus Student checks the settings in the Allow (+)(-)column.

6. Click **Save** after you set up or changed your code table.
7. Specify the **Path to Definition Files**. This path refers to the location of scanning form definition files for attendance and final grade forms. These files are static and do not change during processing. These files should reside on the local hard drive of the workstation that will process the scanning portion of the Scantron Interface. The form definition files are uploaded to the OMR from the workstation when scanning begins. The "Path to SCANTRON files" must be on the PC to which the SCANTRON optical mark reader (OMR) is attached. The scanning process does not work reliably when these files are transferred during scanning from a network server through the PC to the OMR because the OMR frequently times out before the file transfer from the server is completed.

   Note: The scanning form definition files are required to reside in the target folder for proper operation and these files are provided with CampusNexus Student in the default folder `C:\Program Files\CMC\CampusVue`.

   Copy the following scanning form definition files to the folder where the scanning output will be targeted:

   - `Attend.800`
   - `Attend2.800`
   - `Attend3.800`
   - `Grade.800`
   - `Grade2.800`
   - `Z001.sds`
   - `Z002.sds`
   - `Z004.sds`

   The SCANTRON files are installed at `C:\Program Files\CMC\CampusVue`. (This implies that you can attach the Scantron unit to any PC running CampusNexus Student.) You can use this path or you can copy the files to a separate SCANTRON directory, for example, `C:\Scantron`.
8. Select the **Scanner COM Port** to which the OMR is attached on the workstation. See Scantron Overview for more details about setting up the connection between the workstation and the OMR.
9. Select the **Grade Scale**.
10. If you are using form 10873 or form 15174, you must enter a **Tardiness Absent Percent**. This is the percentage of the total class meeting time to be deducted if a student is tardy. For example, if the Tardiness Absent Percent is 10, when a student is tardy, 6 minutes are deducted for a class that meets for 60 minutes. On the Attendance Detail Report, this shows up as 54 minutes present and 60 minutes scheduled.
11. Click **Test Communication** to check the communications between the workstation and the OMR. CampusNexus Student sends a signal to the OMR and the OMR returns a signal to CampusNexus Student. You can see this signal transfer by watching the receive and transmit lights on the OMR control panel.

    - If the communications test is successful, a confirmation message is displayed.
    - If your CampusNexus Student/SCANTRON interface is not properly configured, an error message is displayed. To troubleshoot the issue:
      - Verify that you followed the setup instructions in SCANTRON Overview.
      - Contact your network system administrator.
      - Contact SCANTRON Corporation or its sales representative.
12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

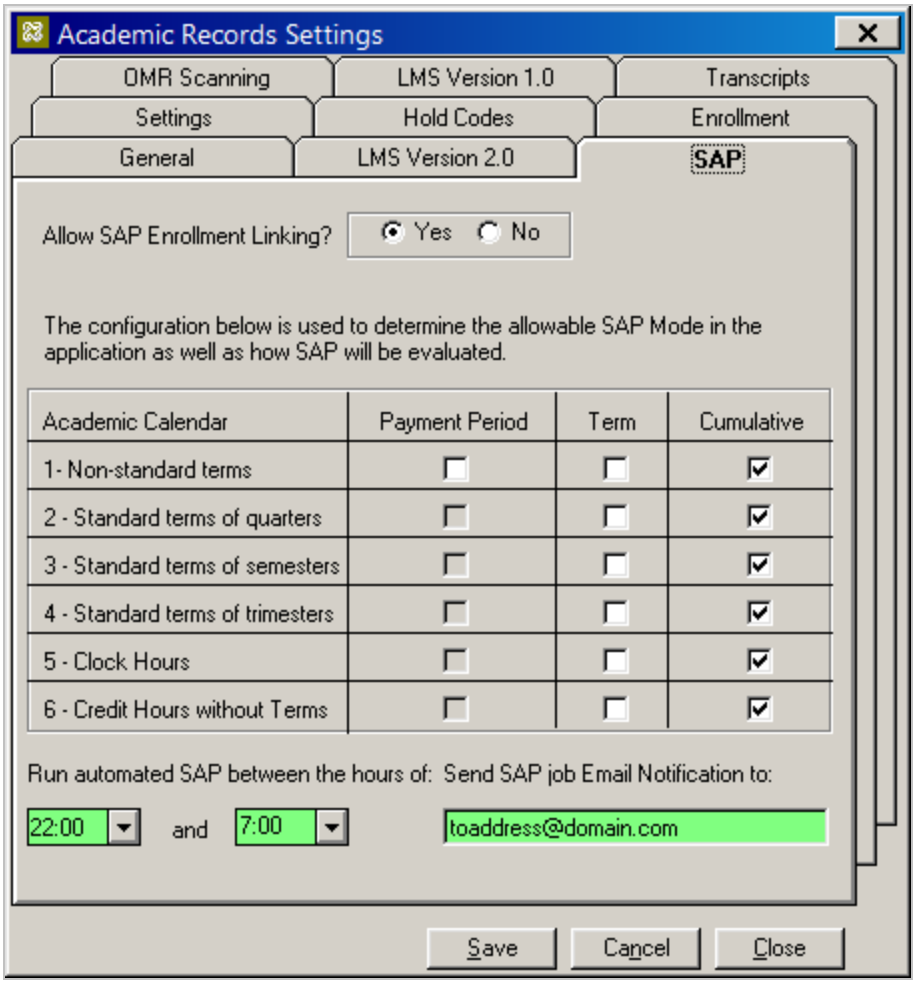
Academic Records Settings - SAP Tab

Academic advisors use the SAP tab of the Academic Records Settings form to configure academic calendars so that the Satisfactory Academic Progress (SAP) process selects appropriate SAP modes (Payment Period, Term, or Cumulative) when evaluating students.

Note: These configuration settings apply to all program versions. If Academic Calendar 1 is configured to use both Term/Cumulative and Payment Period SAP, the academic advisor can configure Academic Calendar 1 for a specific program version.

To configure SAP settings:

1. Navigate to **Setup** > **Academic Records**. The Academic Records Settings form is displayed. Select the **SAP** tab.



2. Select **Yes** to Allow SAP Enrollment Linking. This option allow previous permanent out enrollments to be linked to subsequent enrollments for SAP calculations. This setting allows users to link enrollments using the Enrollment Wizard and the Re-Entry Wizard, as long as the user is also configured as a member of the Staff Group AD - SAP Linked Enrollment.

   When No (default) is select, only enrollments from the Enrollment folder can be linked.

3. Select appropriate check boxes to define the **SAP modes** that SAP calculations can be run in CampusNexus

Student. The following modes are available:

- All
- Term Only
- Cumulative Only
- Term and Cumulative
- Payment Period Only
- Payment Period and Term
- Payment Period and Cumulative

The SAP mode setting changes the availability of the 'Term Based' and 'Cumulative' radio buttons on the Satisfactory Academic Progress Calculation form when processing SAP.

Notes:

- On Academic Calendar 1, all check boxes are enabled and available for selection.
- On Academic Calendars 2, 3, and 4, Payment Period is disabled; only Term and Cumulative are enabled and available for selection.
- On Academic Calendars 5 and 6, if Payment Period is selected, Term and Cumulative are disabled. If Term or Cumulative is selected, Payment Period is disabled.

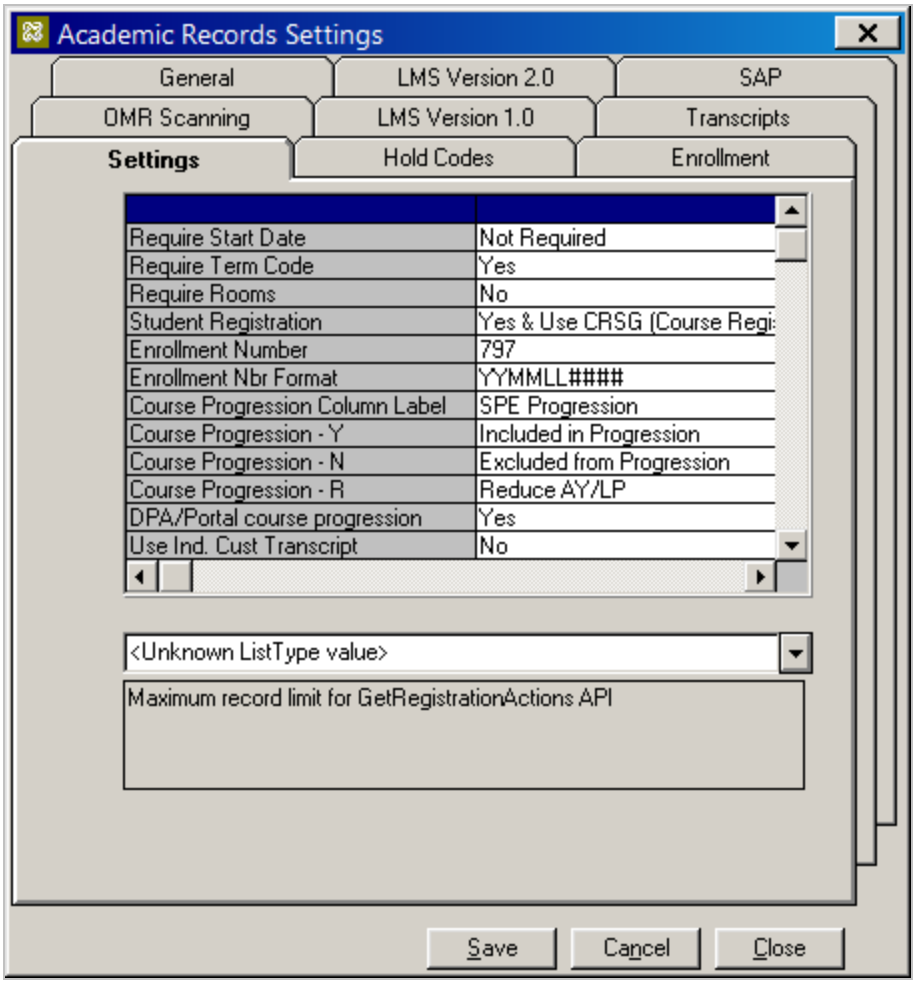
4. Specify the **hours** when the SAP can be run and the **email address** for the SAP job notification.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Academic Records Settings - Settings Tab

The Academic Records Settings form is used to determine certain procedures required by your institution. Set these parameters according to the way your institution operates. The first tab displayed is the Settings tab.

To set these parameters:

1. Navigate to **Setup** > **Academic Records**. The Academic Records Settings form is displayed. Select the **Settings** tab.



2. Click on the setting you want to configure and select an appropriate value from the list below the list of settings. Notice the instructions at the bottom of the form.. For more information, see Field Descriptions.

3. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Field Descriptions

Field	Description
Require Start Date	Does your institution require validation of student start dates according to your program version start dates? Must a student start on a given program version start date? Select one of the following values: • Required and Not Modifiable • Required and Modifiable • Not Required The setting you choose affects the expected start date, mid-point date, and expected graduation dates on the Enrollment Wizard and Student forms.
Require Term Code	Does your institution require class schedules to be associated with a specific term? Select Yes or No.
Require Rooms	Does your institution require rooms to be assigned when setting up class schedules? Select Yes or No.
Student Registration	The values for this field are: • Yes • No • Yes & Use CRSG (Course Registration Sharing Groups) When Yes is selected, only courses offered at the student's campus are displayed. When No is selected, the previous logic listing all courses offered within the defined campus group is used. When Yes & Use CRSG (Course Registration Sharing Groups) is selected, course sections are shared with other campuses giving students additional options to register for course sections that may be filled at their home campus. The sponsoring campus owns the course and determines which campuses to share that course section. Students at these campuses can then register into these course sections at either campus. Any campus with CRSG enabled will be available to any other campus (provided the user has access rights to both campuses). To prevent sharing course sections with other campuses, select No. **Note**: The CRSG feature works concurrently with the course cross-referenced option, where students take courses at the same campus or a different campus with a different course number, using this course to fulfill the degree requirements.
Enrollment Number	Specify a number representing the most recent enrollment number assigned to any student. The next student to enroll will be assigned an enrollment number that is one greater than the number entered here. CampusNexus Student automatically increments the enrollment number as numbers are assigned to students. Do not confuse the enrollment number with the Student ID which is automatically assigned by CampusNexus Student to each new lead. The Student ID and enrollment number are used for different purposes and may only coincidentally be the same value for a given student. The Student ID is set up under Setup > Admissions.

Field	Description
Enrollment Number Format	You can control the format for enrollment numbers. Once you determine the format of the enrollment number, CampusNexus Student can automatically assign a unique enrollment number to each new enrollment. The enrollment number is assigned at the time the student enrolls in a program version. If a student enrolls in two program versions, the student will have a different enrollment number for each program. The current format is displayed in the text box under the settings list. Notice the instructions below the text box. Use the codes in the instruction box to form your own enrollment number format by entering them in the text box. The maximum length of the student number is ten (10) characters. You can combine the codes in any order. The codes are as follows: • YY - low order two digits of the year in the current system date • MM - month digits in the current system date • DD - day digits in the current system date • # - digit in a sequential number assigned by CampusNexus Student to each student enrollment. Include at least 3 digits in this portion of the enrollment identifier. *Example*: Your sequential numbers have reached 12,784, and you have #### as this portion of the format. The enrollment number will show 2784. • L - letter in the student's last name. *Example*: You include LL as part of your student ID format. A student whose last name is Smith would have SM in the enrollment number. • F - letter in the student's first name. *Example*: You include FF as part of your student ID format. A student whose first name is John would have JO in the enrollment number.
Course Progression Column Label	This option enables system administrators to specify the text of the column label for course progression values in the Degree Progress Audit (DPA).
Course Progression - Y	The text associated with this setting is displayed in the Legend whenever course progression is turned on. Customizable field.
Course Progression - N	The text associated with this setting is displayed in the Legend whenever course progression is turned on. Customizable field.
Course Progression - R	The text associated with this setting is displayed in the Legend whenever course progression is turned on. Customizable field. For more information about the Course Progression settings, see Allow courses to be exempt from progression.

Field	Description
Custom Transcript	Select the file to be used when printing a transcript by clicking in the text box under the settings list. By default, the text box is empty. Click None to clear a previously selected custom transcript. **View > Academic Records > Final Grades**. When the Transcript option and Print button are selected, CampusNexus Student checks for a custom transcript file. If there is no custom transcript, CampusNexus Student uses the generic transcript report. **View > Contact Manager > Transcript Request**. When the Transcript option and Print Transcript button are selected, CampusNexus Student checks for a custom transcript file. If there is no custom transcript,CampusNexus Student uses the generic transcript report. **Daily > Contact Manager > Process Transcript Request**. When the Transcript option and Print Transcripts button are selected, CampusNexus Student checks for a custom transcript file. If there is no custom transcript, CampusNexus Student uses the generic transcript report.
Use Ind. Cust Transcript	Select whether to use a custom transcript for individual students.
Use Batch Cust Transcript	Select whether to use a custom transcript for student batches.
Allow Transfer Reverse	Select whether to allow reverse transfer.
Allow Enrollment Re-Entry	Select whether to disable the use of the Re-Entry button on the enrollment form.
Degree Progress Audit	Specify whether to enable the Degree Progress Audit. The following values are available: • No • Yes, with Course Level GPAs • Yes, without Course Level GPAs Choose between the existing Degree Audit only, the existing Degree Audit and the new Degree Audit with course level G Pa's, or the existing Degree Audit and the new Degree Audit without course level GPAs. **Important Note**: The 'Yes' options are available only if the API Web Services have been configured. When the setting is changed to either one of the 'Yes' options, CampusNexus Student displays a login screen for access to the API Web Services. Once the user has been authenticated, CampusNexus Student verifies that the API Web Services have been properly configured to run the Degree Progress Audit. If the configuration is verified, the setting is changed to 'Yes'. Otherwise the setting is reset to 'No' and following message is displayed: *"Authentication was not provided or one or more of the API web services necessary to use the Degree Progress Audit is not installed or not configured properly. As a result, the Degree Progress Audit cannot be turned on at this time."* If this message is displayed, configure the API Web Services before attempting to enable the Degree Progress Audit.

Field	Description
Student Degree Evaluation	Select whether to allow the Student Degree Evaluation Report to be run. When set to No, the Student Degree Evaluation Report print button is hidden on the Student Enrollment form and from the reports menu.
Degree Audit Label	The text entered in this field appear as a heading on the Degree Progress Audit form and on its printout. It does not affect the Menu, Title Bar, or Student Bar captions.
Scanning Service?	Select the scanning devices used at your institution. The options are: • Scantron • NCS Pearson • None
Allow Cross-Referencing?	Select Yes (default) to enable cross-referencing of courses.
Allow Course Substitution	Select Yes to enable course substitutions during scheduling. When a user registers a student into a course that has a substitution pool, the user can select a course from the substitution pool during the registration process started at the student's Schedule form. The default setting is No.
Audit Course Registration	Select Yes to enable audit course registration for students. The default setting is No.
Campus for add/drop?	Use this option to configure which campus is used to determine the add/drop configuration. The options are: • Student's enrollment campus (default) • Course section's campus
Copy Class Schedule Batch Size	Use this option to specify the number of classes to be copied in a single batch.

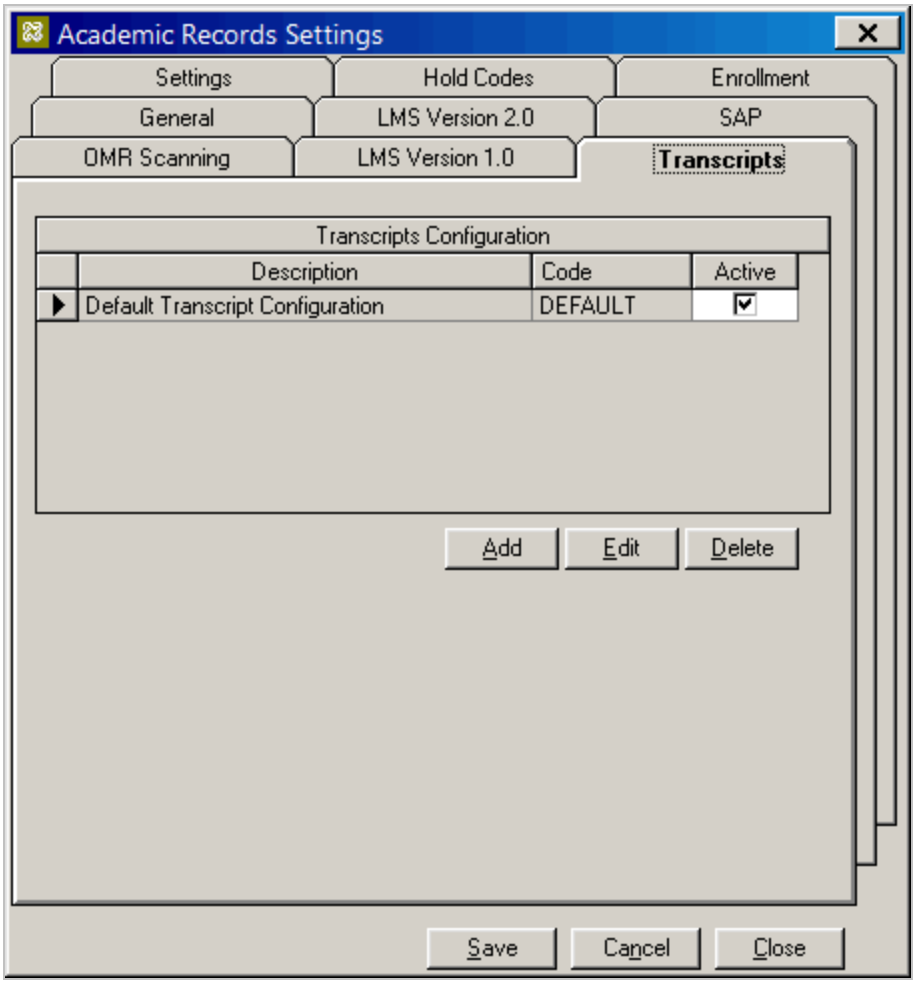
Academic Records Settings - Transcripts Tab

Use the Transcripts tab of the Academic Records Settings form to configure how transcripts are handled.

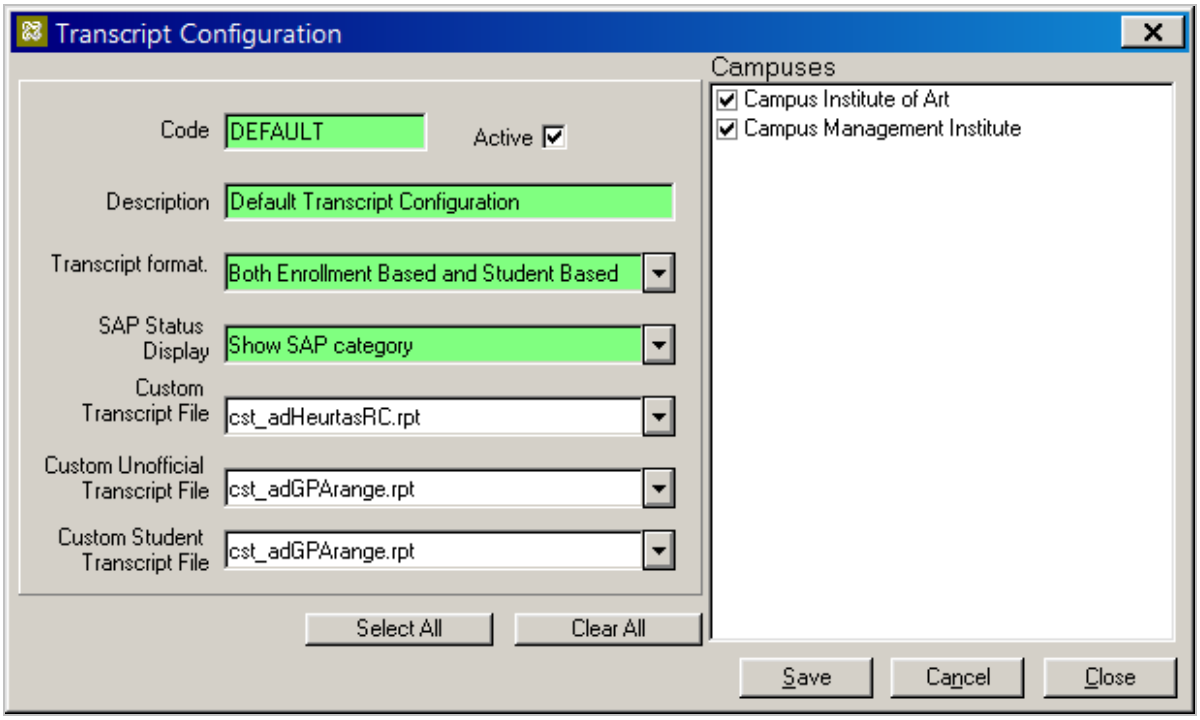
For more information, see Final Grades, Academic Records Hold Codes Setup, User Info Academic Records, Academic Records Reports.

To configure transcripts:

1. Navigate to **Setup** > **Academic Records**. The Academic Records Settings form is displayed. Select the **Transcripts** tab.



2. Click **Add**, or select a record and click **Edit**. The Transcript Configuration form is displayed. Use this form to define custom transcripts by campus, institution brand, or for all campuses.



3. Specify a unique **Code**.
4. Enter a **Description**.
5. Select or clear the **Active** check box to designate the record as active or inactive, respectively.
6. Select the **Campuses** for which this transcript configuration applies. The list of campuses displayed are those to which the user logged on has access.
7. Select the **Transcript Format**. The options are:
    - Student Based – transcripts that list courses for all student enrollments grouped by term code in chronological order by term start date.

      Enrollment and degree information appears at the end of the report. The GPA, Credits, and Hours for courses taken in the same term, but at different institutions, are summed and presented as a single set of totals for the term. Custom student-based transcripts can also be defined on a per campus basis.
    - Enrollment Based – transcripts that list courses for the selected enrollment.
    - Both Enrollment and Student Based – allows you to select whether to print an enrollment based or student based transcript for each student.
8. Select the **SAP Status Display** to print on the transcript. The options are:
    - Show All
    - Show None
    - Show Pass SAP statuses only
    - Show Fail SAP statuses only
    - Show SAP category

When you select 'Show SAP category', "SAP Met" or "SAP Not Met" is displayed on the transcript at the end of each term.

9. If a **Custom Transcript File** is to be used, select the rpt file. Otherwise, select None (default).
10. If a **Custom Unofficial Transcript File** is to be used, select the rpt file. Otherwise, select None (default).

    This file selection is only available for Enrollment Based transcripts. Unofficial transcripts are clearly labeled as "Unofficial Transcript".
11. If a **Custom Student Transcript File** is to be used to view and print student based transcripts using a customized report, select the rpt file. Otherwise, select None.

    This option is only enabled when Transcript Format is Student Based or Both Enrollment and Student Based.
12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

    Note: You can customize your transcripts with the transferring college's course and college information.

Setup > Distance Education

When you navigate to Setup > Distance Education, the Distance Education Setup form is displayed. Use this form to configure pay rates and hold criteria related to distance education. The form contains the following tabs:

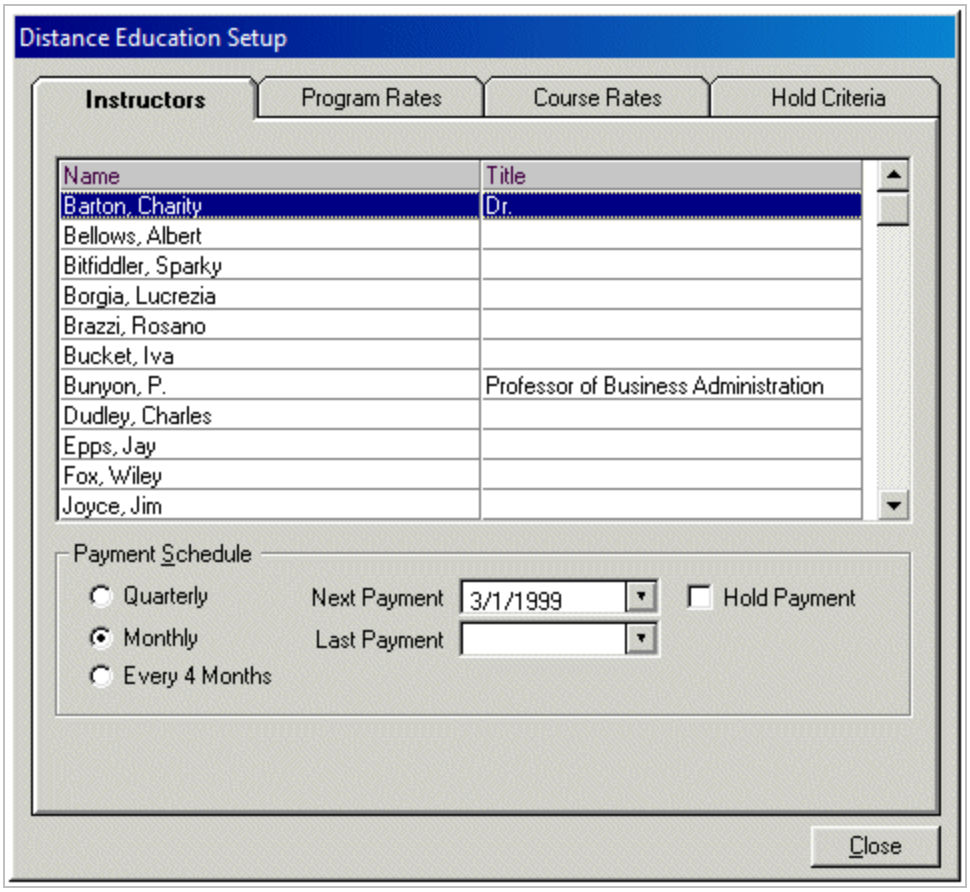
- Instructors
- Program Rates
- Course Rates
- Hold Criteria

Distance Education Setup - Instructors Tab

Use the Instructors tab on the Distance Education Setup form to set up the payment schedule for distance education instructors. If necessary, you can put a hold on payments.

To set up an instructor for distance education procedures:

1. Navigate to **Setup > Distance Education**. The Distance Education Setup form is displayed.
2. Select the **Instructors** tab. The list of available instructors (from Staff setup) is displayed.



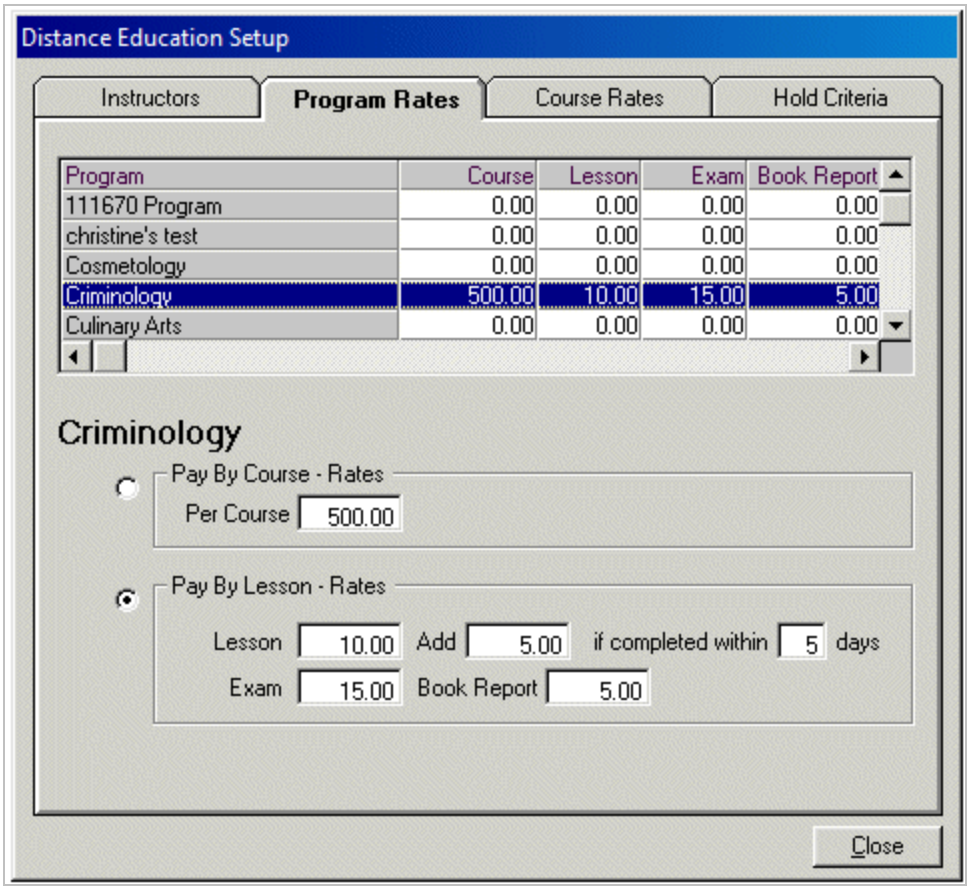
3. Select an **instructor**.
4. Select appropriate **Payment Schedule** options.
5. Select or clear the **Hold Payment** check box
6. Click **Close** to close the form.

Distance Education Setup - Program Rates Tab

Use the Program Rates tab on the Distance Education Setup form to set up pay rates for distance education instructors at the program level.

To set up a pay rate schedule at the program level:

1. Navigate to **Setup > Distance Education**. The Distance Education Setup form is displayed.
2. Select the **Program Rates** tab. The list of available programs is displayed.



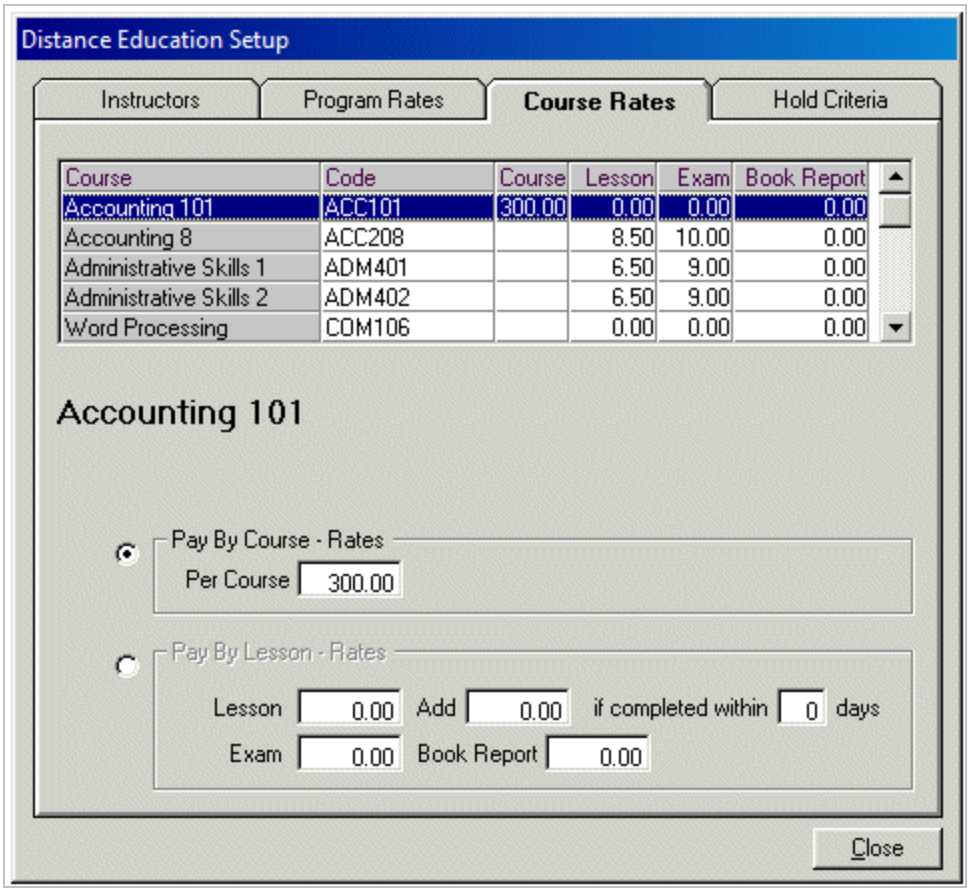
3. Select a **Program**. The bottom of the form displays fields to configure the rates for the selected program.
    - If the instructor is to be paid once for each course, select the option to **Pay by Course**. Enter the amount per course within the program.
    - If the instructor is to be paid once for each lesson, exam, and book report, select the **Pay by Lesson** option. Enter the pay amount for a lesson (and additional amount if completed within a specified number of days), exam, and book report.
4. Click **Close** to close the form. .

Distance Education Setup - Course Rates Tab

Use the Course Rates tab on the Distance Education Setup form to set up pay rates for distance education instructors at the course level.

To set up a pay rate schedule at the course level:

1. Navigate to **Setup > Distance Education**. The Distance Education Setup form is displayed.
2. Select the **Course Rates** tab. The list of available courses is displayed.



3. Select a **Course**. The bottom of the form displays fields to configure the rates for the selected course.
    - If the instructor is to be paid once for each course, select the option to **Pay by Course**. Enter the amount per course within the program.
    - If the instructor is to be paid once for each lesson, exam, and book report, select the **Pay by Lesson** option. Enter the pay amount for a lesson (and additional amount if completed within a specified number of days), exam, and book report.
4. Click **Close** to close the form.

Distance Education Setup - Hold Criteria Tab

Use the Hold Criteria tab of the Distance Education Setup form to select a group of students for which to hold lesson receipts. A student might appear in such a group if, for instance, the student's account balance is unacceptable. If a student appears in one or more of the groups listed on this tab, you cannot post the receipt of a lesson or exam from the student. The condition which caused the student to appear in the group(s) must be cleared before lessons can be received. This method of designating holds on lesson receipts is best suited for "batch processing of holds" as opposed to selective holds on specific lessons.

Note: Using the "hold" mechanism to block the receipt of lessons is not the same as placing a lesson on hold in the procedure under View > Academic Records > Lessons. Also, lessons that are placed on hold using this method do not appear with hold flags on the Distance Education > Lesson Tracking Report.

To designate a student group as a hold group:

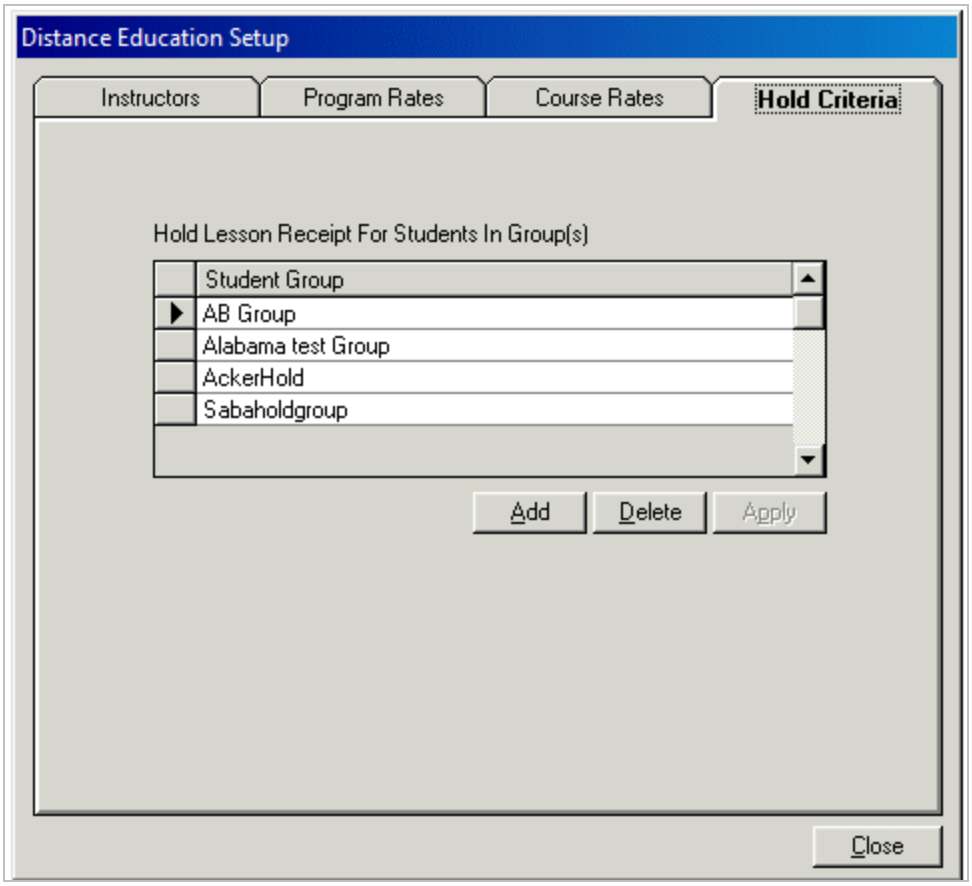
1. Determine that the group you want to use as a hold group has been created.

   A student group is defined in several methods in CampusNexus Student:

   - You can set up a student group under Find > Student Groups > Add (manually controlled group only).
   - You can also create a student group under Find > Student (Search).
   - You can create a group from a report that lists students having common characteristics. For instance, you could run an Account Balance report for students with a balance over $100.00 and create a group from the report results.

   How ever you create the group, it must be available before you label it as a hold group in this procedure.

2. Navigate to **Setup > Distance Education**. The Distance Education Setup form is displayed.
3. Select the **Hold Criteria** tab. Existing student groups are displayed. Review the list of groups to be sure the group to be added is not already listed.



4. To add a group, click **Add**. A blank line appears at the bottom of the list.
5. Click in the blank line and click to select a student group.

   To associate several student groups with the hold action, repeat the preceding steps as needed.
6. Click **Apply** to save your hold code selections.
7. Click **Delete** to delete a group.

   Note: Deleting a student group from this list does not delete it as a viable student group.
8. Click **Close** to close the form.

Setup > Career Services

When you navigate to Setup > Career Services, the Career Services - Settings form is displayed. Use this form to configure placement settings, fields to be included in the placement wizard, and hold codes related to career services. The form contains the following tabs:

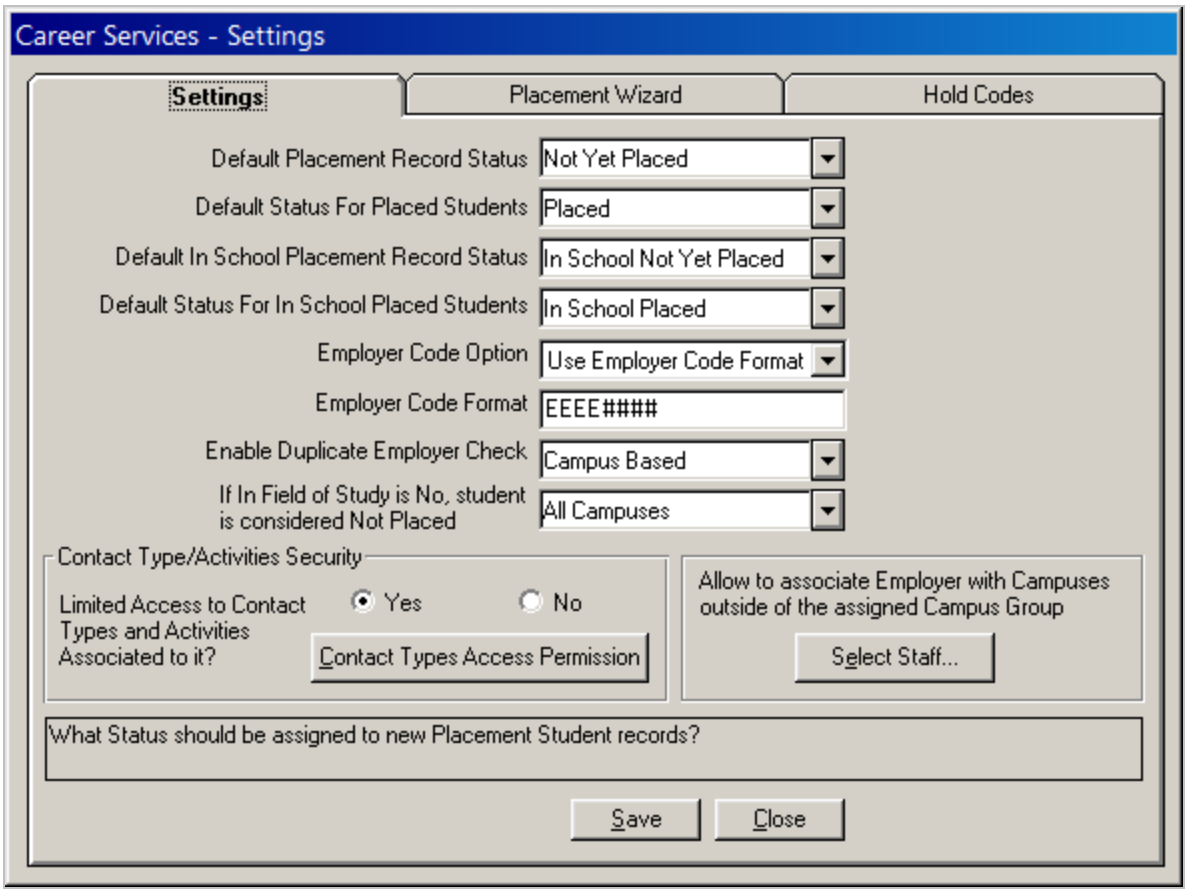
- Settings
- Placement Wizard
- Hold Codes

Career Services Settings - Settings Tab

Use the Settings tab of the Career Services Settings form to configure options such as the default status to be assigned to a new placement record when it is created, the default status to be assigned to the placement record when a student is placed, employer codes, and staff permissions related to career services.

To configure career services settings:

1. Navigate to **Setup** > **Career Services**. The Career Services - Settings form is displayed. Select the **Settings** tab.

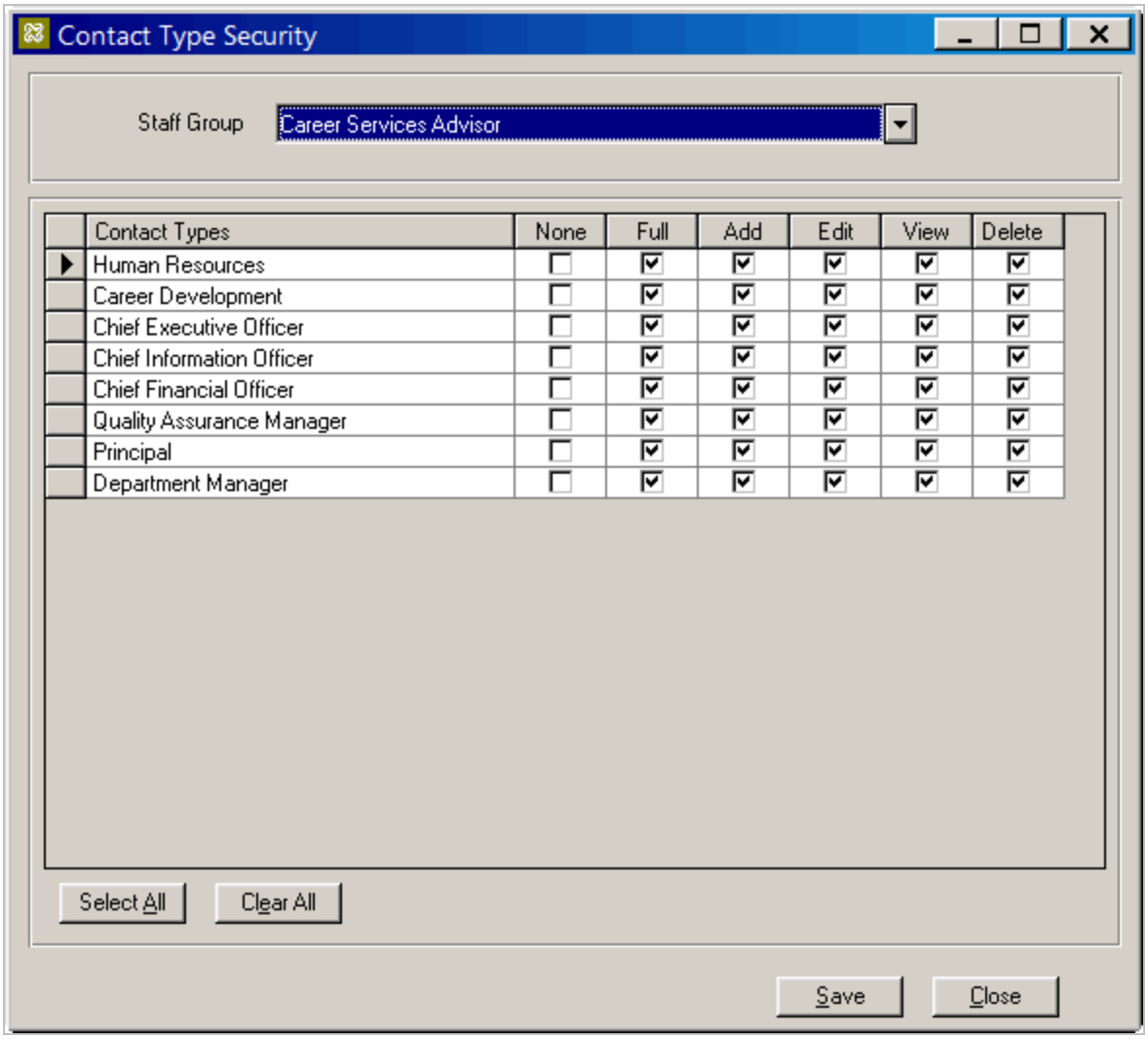


2. Specify appropriate options. See Field Descriptions.
3. Click **Save**.
4. Click **Close** to close the form.

Field Descriptions

Field	Description
Default Placement Record Status	This status is assigned to each new placement record at the time it is created (at the time of each enrollment). The options are: • Not Yet Placed – This is the default for new students. • Part Time Placed – Use this option when the student has been placed in part time position
Default Status for Placed Students	This status is assigned when the student has been placed. The options are: • Currently Attending – Student is still in school and placed. • Placed – Student is out of school and placed. • Previously Placed – Student is in school and has been previously placed.
Default In School Placement Record Status	The assigned status is: • In School Not Yet Placed.
Default Status For In School Placed Students	The assigned status is: • In School Placed.
Employer Code Option	Select one of the following options: • Manual Entry – Requires a user-entered code to be used. • Use Employer Code Format – A system-generated code can be applied to each employer .
Employer Code Format	The format used by CampusNexus Student to generate employer codes (Employer Code Option must be set to Employer Code Format to enable this feature). Valid Employer Codes consist of at least 6 characters and no more than 16 characters. Define the format of the code by using the following values: • YY = Year • MM = Month • DD = Day • #### = Next Number • EEEE = Employer's Name The last four characters must be the #### symbols for generating the unique number. *Example*: *EEEE####* generates an employer code consisting of the first four characters of the employer's name followed by a unique 4-digit number generated by the system.

Field	Description
Enable Duplicate Employer Check	Select one of the following options: • No – (default) to disable the checking, • Global – check for duplicates across all campuses, • Campus Based – check for duplicates within the selected campuses.
If in Field of Study is No, student is considered Not Placed	Select one of the following options: • No – Select this option to *disable* listing a student record as Placed; if this option is chosen the student is considered Not Placed. • All Campuses – Select this option to *enable* listing a student record as Placed; if this option is chosen the student is considered Placed for all Campuses. • Campus-Based – Select this option to *enable* listing a student record as Placed; if this option is chosen the student is considered Placed for the selected Campuses only. **Note**: Notice the message when selecting the Campus-Based option: *'Select this option to enable or disable listing a student record as Placed if In Field of Study is Yes or Related or Student Attestation only.'* Student Attestation treats a student's placement the same as 'placed in a related field' or 'placed in field', yet distinguishes it so that accurate placement in the system can be demonstrated.

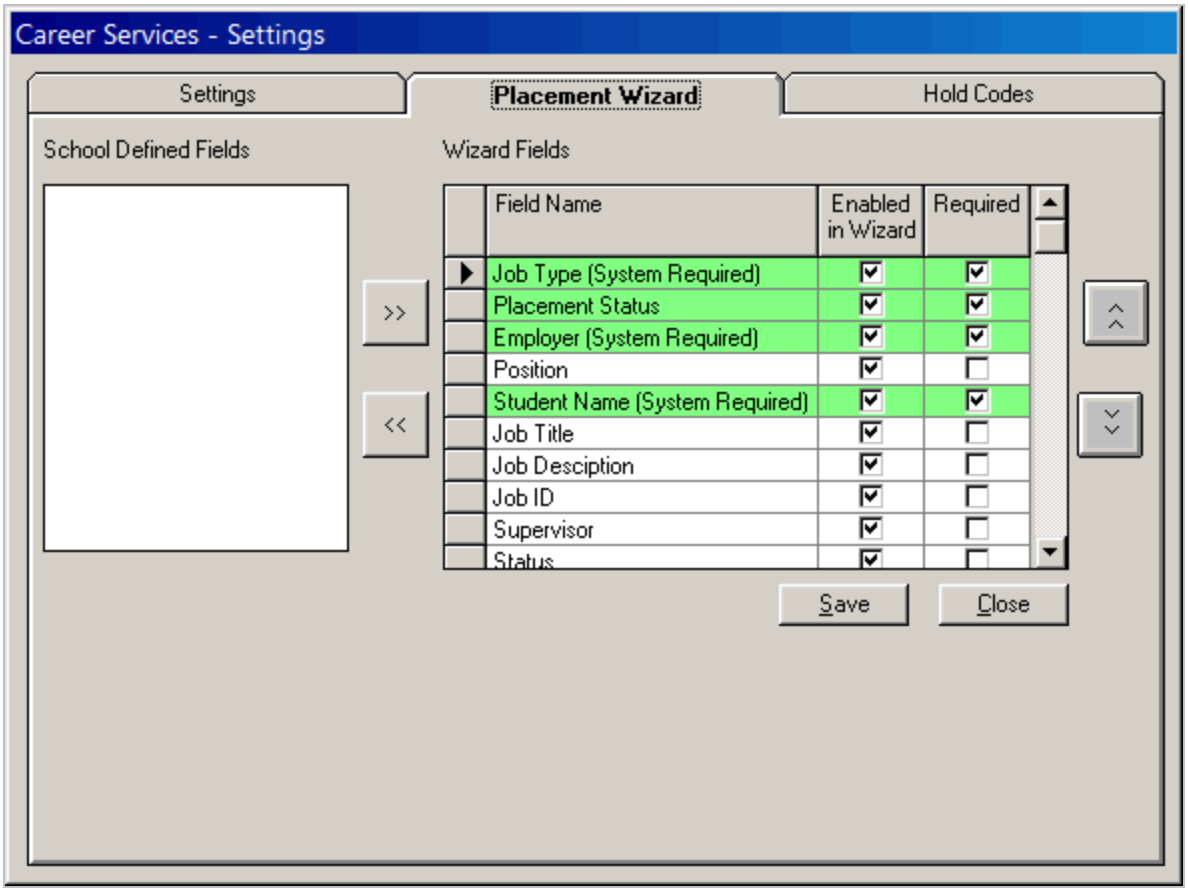
Field	Description
Limited Access to Contact Types and Activities associated to it?	To assign security levels for contacts based on staff group permissions, select **Yes** and click the **Contact Types Access Permission** button. The Contact Type Security form is displayed.  1. Select a **Staff Group**. 2. Assign security levels for the contact Types. 3. Click **Save** and **Close** the Contact Type Security form.
Select Staff	Click this button to allow staff members to associate employers with campuses outside their assigned campus group. See Staff To Associate Employer With Other Campuses for instructions.

Career Services Settings - Placement Wizard Tab

Use the Placement Wizard tab of the Career Services Settings form to customize the Student Placement Wizard for your institution.

To configure the placement wizard:

1. Navigate to **Setup** > **Career Services**. The Career Services - Settings form is displayed. Select the **Placement Wizard** tab.



2. The Wizard Fields area lists the field names included in the wizard forms. Each field can be enabled for selection in the wizard and set to require. Select appropriate options in the **Enabled in Wizard** and **Required** columns..

   The following fields are required by the system and are marked "System Required":

   - Job Type
   - Employer
   - Student Name
   - Date Placed
   - Start Date

   Fields which are required by the Data Dictionary are unmarked, but if you attempt to change their settings, a message state that the field is required by the Data Dictionary.

3. Click

<< and >> to move fields to and from the Wizard Fields section and School Defined Fields section. When you add a school-defined field to the wizard, a separate form is displayed during the wizard operation that allows the user to enter the corresponding field information.

4. If your campus uses more than one school-define field, click and to arrange the order of the school-defined fields as they appear on the third form of the Placements Wizard.
5. Click **Save**.
6. Click **Close** to close the form.

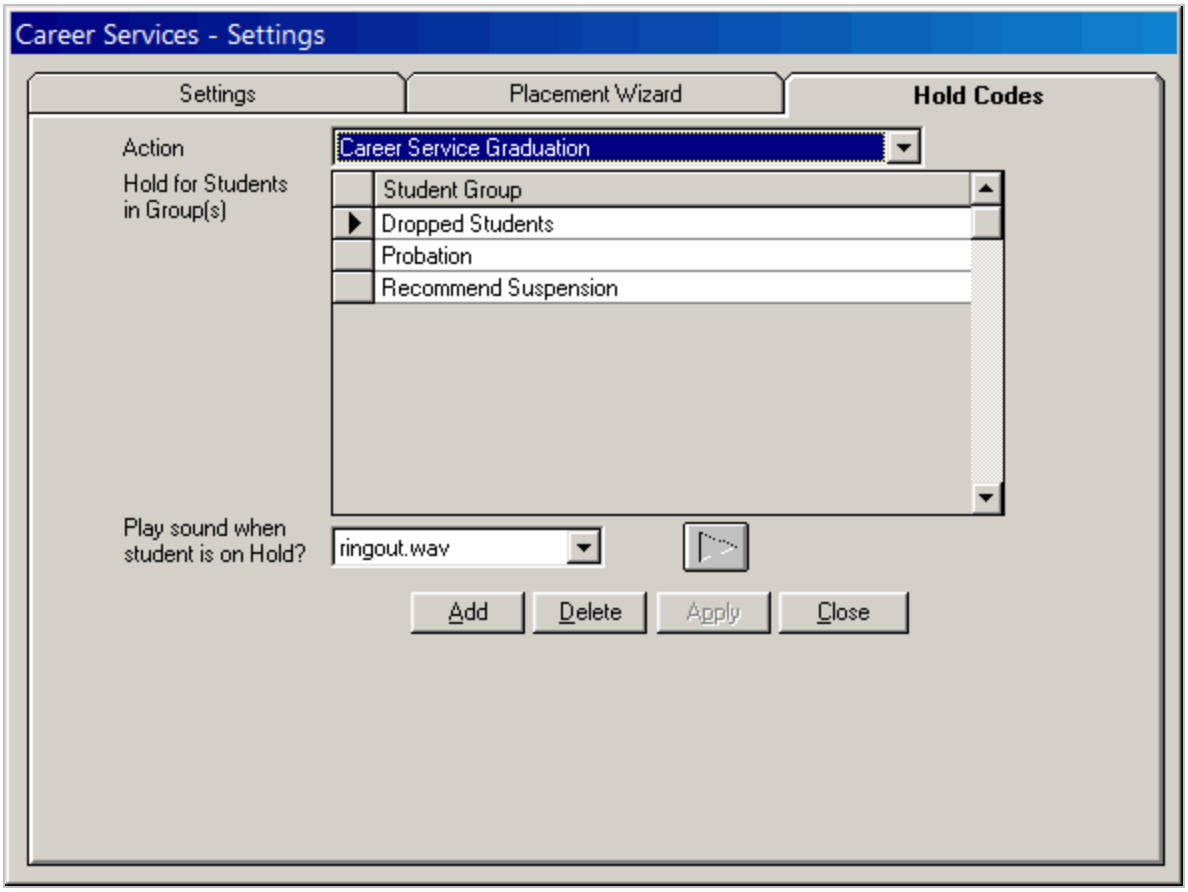
Career Services Settings - Hold Codes Tab

Students are placed on hold if some required documents are missing or some obligations of the student has not been fulfilled. It is at the discretion of the staff member to make the association. Place a student or group of students on hold for graduation or placement. Users can place a group on hold, or add student to a hold group, or place a student on hold.

Use the Hold Codes tab of the Career Services Settings form to associate hold actions with student groups.

To associate a hold action with a student group:

1. Navigate to **Setup** > **Career Services**. The Career Services - Settings form is displayed. Select the **Hold Codes** tab.



2. Select an **Action**:
   - Career Service Graduation - This option prevents changing the student's status from enrollment to graduation.
   - Career Service Placement - This option prevent adding a placement record for the student. Students with this hold will not appear when a staff member or an employer does a candidate search.
3. To add a group, click **Add**. A blank line appears in the Student Group area.
4. Click in the blank line and click to select a student group.
5. If you want a sound to be played when the student master for a student on hold is displayed, select a sound (.wav)

file from the **Play sound when student is on Hold?** list.

Click the **Play** button to hear the selected wave file. Sound files must be stored in the CampusNexus Student shared folder in the sounds subfolder. Sample ".wav" files are included. You can customize your "hold" sounds by placing additional ".wav" files into the CampusNexus Student share/sounds folder. (The sound feature may not be available on schools using Citrix or terminal servers.)

When working with student records, the hold sounds are audible only when the student's master record is opened.

6. Click **Apply** to save your hold code selections.
7. Click **Delete** to remove a group from the list of hold groups.

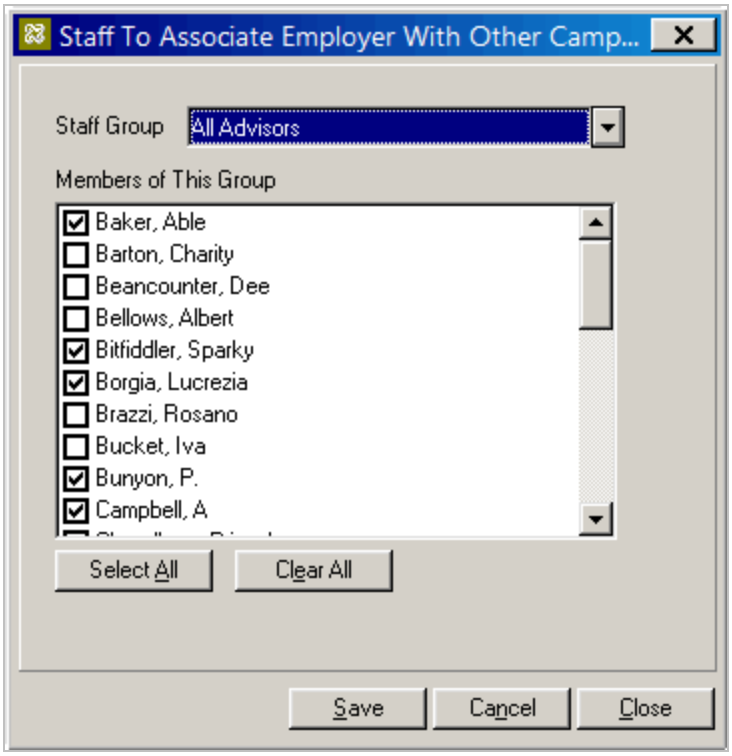
   Note: Deleting a student group from this list does not delete it as a viable student group.
8. Click **Close** to close the form.

Staff to Associate Employer with Other Campuses

Use this form to associate employers with campuses outside the staff member's normally accessible campus group. See also Employers.

To allow a staff member this security right:

1. Navigate to **Setup** > **Career Services**. The Career Services - Settings form is displayed. Select the **Settings** tab.
2. Click the **Select Staff** button. The Staff To Associate Employer With Other Campuses form is displayed.



3. Select the staff member's **Staff Group** from the drop-down list.
4. To allow the majority of the members within the Staff Group, click **Select All** and then clear the check boxes for those staff members that *will not* have permissions.
5. If only a few members will have permission, click the **Clear All** and then select the staff members that you want to have permissions.
6. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Setup > Housing

When you navigate to Setup > Housing, the Housing - Setup form is displayed. Use this form to set up validation rules for room occupancy and student eligibility and hold codes related to housing. The form contains the following tabs:

- General
- Hold Codes

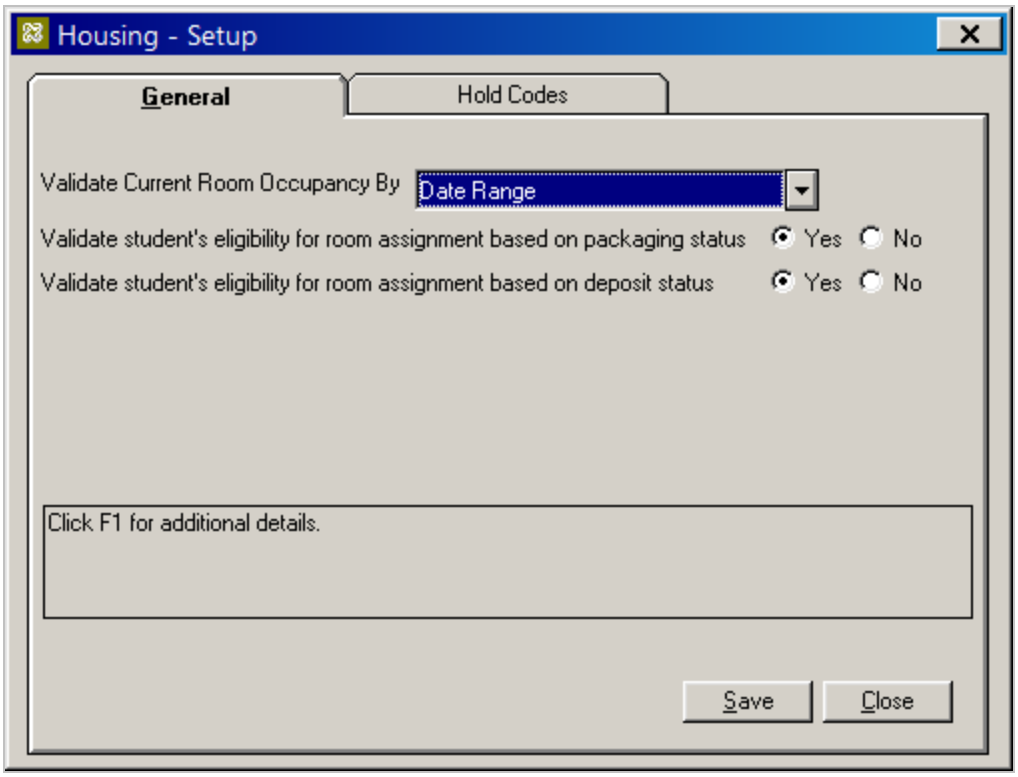
Additional settings related to student housing are configured under Lists > Housing.

Housing Setup - General Tab

Use the General tab of the Housing - Setup form to configure the functionality that validates current room capacity when placing a student in a room or updating the housing period. This configuration affects Roommate Matching, Switch Room, Change Graduation Dates, Update Housing Period, and Renew Lease.

To configure settings on the General tab:

1. Navigate to **Setup** > **Housing**. The Housing - Setup form is displayed. Select the **General** tab.



2. In the **Validate Current Room Occupancy By** field select one of the following options:
   - End Date (default) – This option validates the number of students in a room based on the End Date specified in the Roommate Matching Wizard.
   - Date Range – This option validates the number of students in a room based on the whole lease period specified in the Roommate Matching Wizard.
3. Select Yes (default) or No for the **Validate student's eligibility for room assignment based on packaging status** option. This is a system level override of the student validation for Packaging Status in the Roommate Matching Wizard.
4. Select Yes (default) or No for the **Validate student's eligibility for room assignment based on deposit status** option. This is a system level override of the student validation for Deposit in the Roommate Matching Wizard.
5. Click **Save**.
6. Click **Close** to close the form.

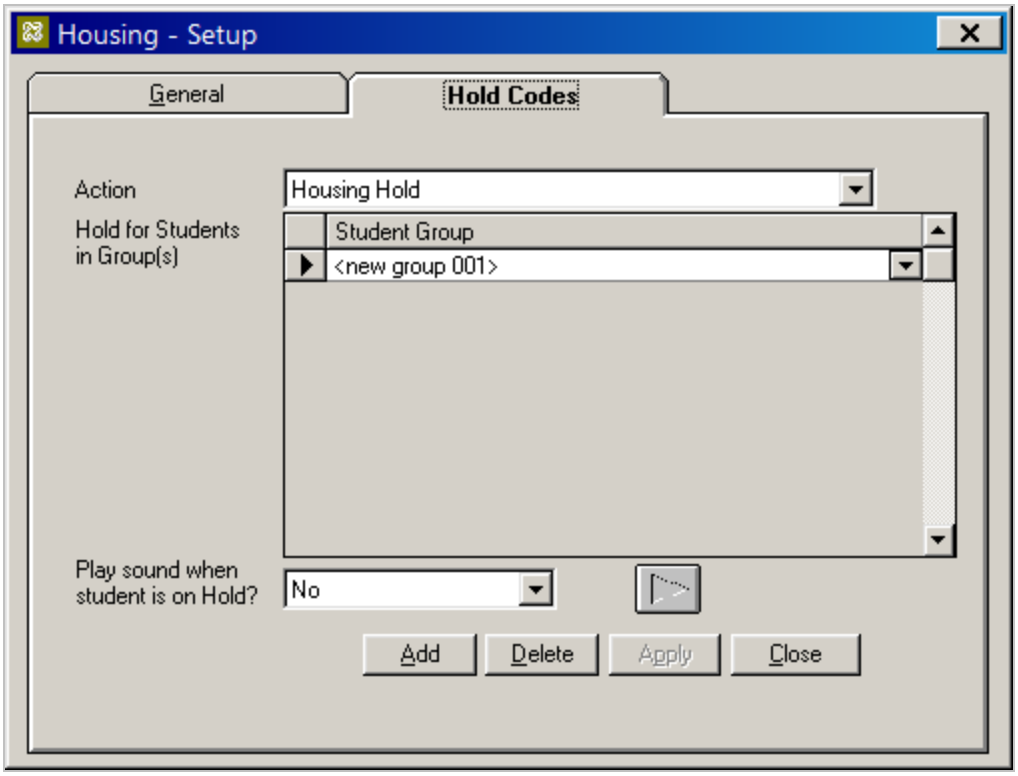
Housing Setup - Hold Codes Tab

Student groups that are put on hold will not be matched with roommates or placed into rooms. However, you can still manually place individual students (who are part of a group that you place on housing hold) into rooms using the Roommate Matching Wizard (Daily > Housing > Roommate Matching).

Note: Create the student groups to which hold actions will be related before proceeding with the hold code setup.

To associate a hold action with a student group:

1. Navigate to **Setup** > **Housing**. The Housing - Setup form is displayed. Select the **Hold Codes** tab.



2. Select an **Action**. The only option is 'Housing Hold'.
3. To add a group, click **Add**. A blank line appears in the Student Group area.
4. Click in the blank line and click to select a student group.

   To associate several student groups with the hold action, repeat the preceding steps as needed.
5. If you want a sound to be played when the student master for a student on hold is displayed, select a sound (.wav) file from the **Play sound when student is on Hold?** list.

   Click the **Play** button to hear the selected wave file. Sound files must be stored in the CampusNexus Student shared folder in the sounds subfolder. Sample ".wav" files are included. You can customize your "hold" sounds by placing additional ".wav" files into the CampusNexus Student share/sounds folder. (The sound feature may not be available on schools using Citrix or terminal servers.)

When working with student records, the hold sounds are audible only when the student's master record is opened.

6. Click **Apply** to save your hold code selections.
7. Click **Delete** to remove a group from the list of hold groups.

   Note: Deleting a student group from this list does not delete it as a viable student group.
8. Click **Close** to close the form.

Setup > CampusVue Finance

When CampusNexus Student is integrated with CampusVue Finance, HR & Payroll, system administrators can configure journal entry groups and ledger copies using the Setup > CampusVue Finance menu options:

- Journal Entry Group
- Ledger Copy/Validate

If CampusNexus Student is integrated with CampusNexus Finance, HR & Payroll, refer to Initial Configuration of CampusNexus Finance, HR & Payroll.

Journal Entry Group

Journal Entry Groups are used to configure how transactions from various CampusNexus Student functional areas are grouped together into journal entries in CampusVue Finance, HR & Payroll.

You can set up Journal Entry Groups and associate them with campus groups and CampusVue Finance, HR & Payroll ledgers from CampusNexus Student. You can also set up and copy fiscal years through the Journal Entry Groups in CampusNexus Student and then verify that the ledgers inCampusVue Finance, HR & Payroll reflect the fiscal years through G/L account look-up in CampusNexus Student.

CampusVue Finance, HR & Payroll provides functionality to copy the Chart of Accounts (COA) and a ledger from one fiscal year to the next. All general ledger account references CampusNexus Student look up information that is set up in CampusVue Finance, HR & Payroll in a real-time manner. This applies to Subsidiaries GL Setup, Fund Sources - G/L Accounts and Refunds, and Student Accounts GL Link.

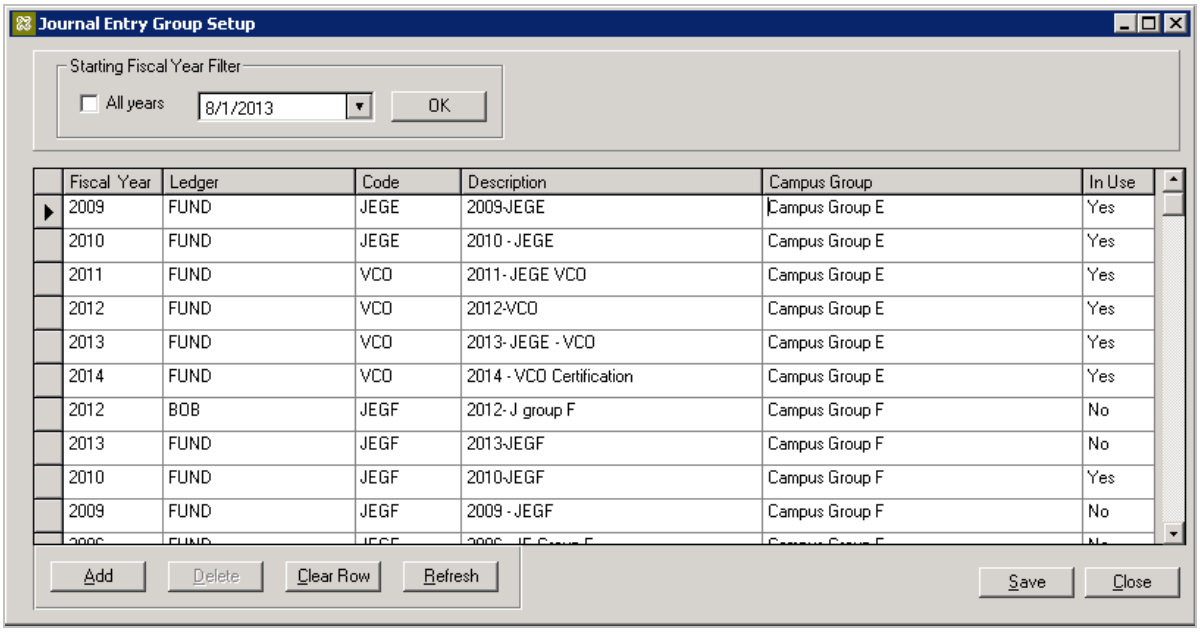
In addition, any other GL Account look-up uses today's date to determine the fiscal year and ledger needed for the appropriate campus. This allows users to manage fiscal years in CampusNexus Student and then verify that the ledgers have been copied in CampusVue Finance, HR & Payroll by accessing GL Account look-up forms in CampusNexus Student's setup forms.

You can copy GL accounts in CampusVue Finance, HR & Payroll to prepare the next fiscal year when the end of a fiscal year is approaching. Once this is done, go to the Journal Entry Group Setup form in CampusNexus Student and add a new Journal Entry Group record. The Fiscal Year drop-down list displays the available fiscal year/ledger combinations which allows users to verify that the Ledgers have been copied in CampusVue Finance, HR & Payroll and are available for GL Account lookups in the CampusNexus Student setup form, such as Student Accounts GL Link. However, having a Fiscal Year of 2007 does not keep transactions from being entered and affecting the 2006 Fiscal year based on the transaction dates.

Note: Adding as many Journal Entry Groups as necessary is permitted, provided that a list of all the campuses assigned to each of the campus groups only appears once per fiscal year.

To set up Journal Entry Groups:

1. Navigate to **Setup > CampusVue Finance > CampusNexus Student Journal Entry Group**. The Journal Entry Group Setup form is displayed. Use this form to set up Journal Entry Groups and associate them with Campus Groups and CampusVue Finance, HR & Payroll Ledgers. See also G/L Link.



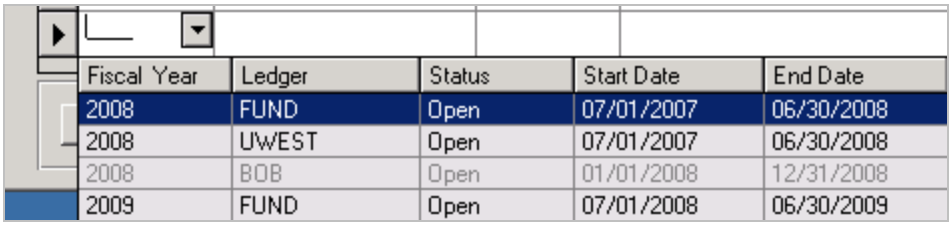
Note: You can add as many Journal Entry Groups as necessary provided that a list of all the campuses assigned to each of the Campus Groups only appears once.

2. Select the **All years** check box to search for all fiscal year listings, or choose a fiscal year from the **Fiscal Years** list and click **OK** .
3. Click **Add** to add a new Journal Entry Group; **Delete** to remove a Journal Entry Group, or **Clear Row** to remove the information for a Journal Entry Group so that you can replace the existing information with updated information.
4. Click **Refresh** to receive the search results again.
5. Click **Save**.

To add Journal Entry Groups:

1. Click **Add**. A new row is added to the bottom of your list.
2. Enter or select a **Fiscal Year**.

   Note: When you select the drop-down in the **Fiscal Year** row, a list of current fiscal years with associated **Start Date** and **End Date** is displayed.



Fiscal Year	Ledger	Status	Start Date	End Date
2008	FUND	Open	07/01/2007	06/30/2008
2008	UWEST	Open	07/01/2007	06/30/2008
2008	BOB	Open	01/01/2008	12/31/2008
2009	FUND	Open	07/01/2008	06/30/2009

3. Assign a CampusVue Finance, HR & Payroll **Ledger** to the Journal Entry Group based on a distinct list from CampusVue Finance, HR & Payroll's Ledger Definition table. The distinct list is needed to exclude duplicates for different Fiscal Years.
4. Enter a **Code** and **Description** for the Journal Entry Group.
5. Select a **Campus Group** from the drop-down list to associate with the Journal Entry Group.

   Note: Campus Groups with the same campuses may not be linked to different Journal Entry Groups with the same fiscal year. For example, if a Journal Entry Group is configured (JEGA) for fiscal year 2007 containing the Campus Group A which contains the Ft. Lauderdale Campus, and the user tries to add Campus D to JEGD for fiscal year 2007 which also contains the Ft. Lauderdale Campus, the following message is displayed: "*This Campus Group contains one or more campuses already included in an assigned Journal Entry Group for the same Fiscal Year. Please make a different selection.*"

To delete Journal Entry Groups:

Select the row to delete and click **Delete**. The row will appear in red once you go to another row. If you click on the row again, a message will ask if you want to edit the record and remove the delete flag. Otherwise, once you click **Save**, the record is deleted.

Note: Any row flagged as **In Use** cannot be deleted because transactions have been released toCampusVue Finance, HR & Payroll. When In Use = Yes, the only field that can be edited is the Journal Entry Group Description field because the Description field does not get passed to CampusVue Finance, HR & Payroll.

To clear Journal Entry Groups:

Select the row to clear and click **Clear Row**. Use this feature when a row has been added but not yet saved, and your want to clear out all fields in the row and start over.

Ledger Copy/Validate

CampusVue Finance, HR & Payroll clients can copy their ledger account/cost account setups in CampusNexus Student from one fiscal year to the next if the ledger accounts/cost accounts do not change dramatically. This allows the set up of ledger accounts/cost accounts in CampusNexus Student for the next fiscal year to be much easier than re-configuring the GL accounts/cost accounts for the next fiscal year manually.

A validation report is available to identify invalid ledger accounts/cost accounts before transactions are released to CampusVue Finance, HR & Payroll. The errors can be corrected and the report can then be run again.

Note: CampusNexus Student versions 14.0 and later enable users to copy and validate stipends in the same way they could validate other credit and debit account numbers in Fund Sources GL Account Setup.

The following GL account setups need to be copied from one fiscal year to another:

- General Ledger Link Setup
- Fund Sources GL Account Setup
- Subsidiary GL Account Setup

Ledgers in CampusVue Finance, HR & Payroll need to be copied in CampusVue Finance, HR & Payroll, as well as the Journal Entry Group Setup for the destination fiscal year in CampusNexus Student, prior to coming to the report form because the validation report requires that the ledger exist in CampusVue Finance, HR & Payroll. If these requirements are not met, the new fiscal year will not appear in the fiscal year drop-down list, meaning it cannot be copied.

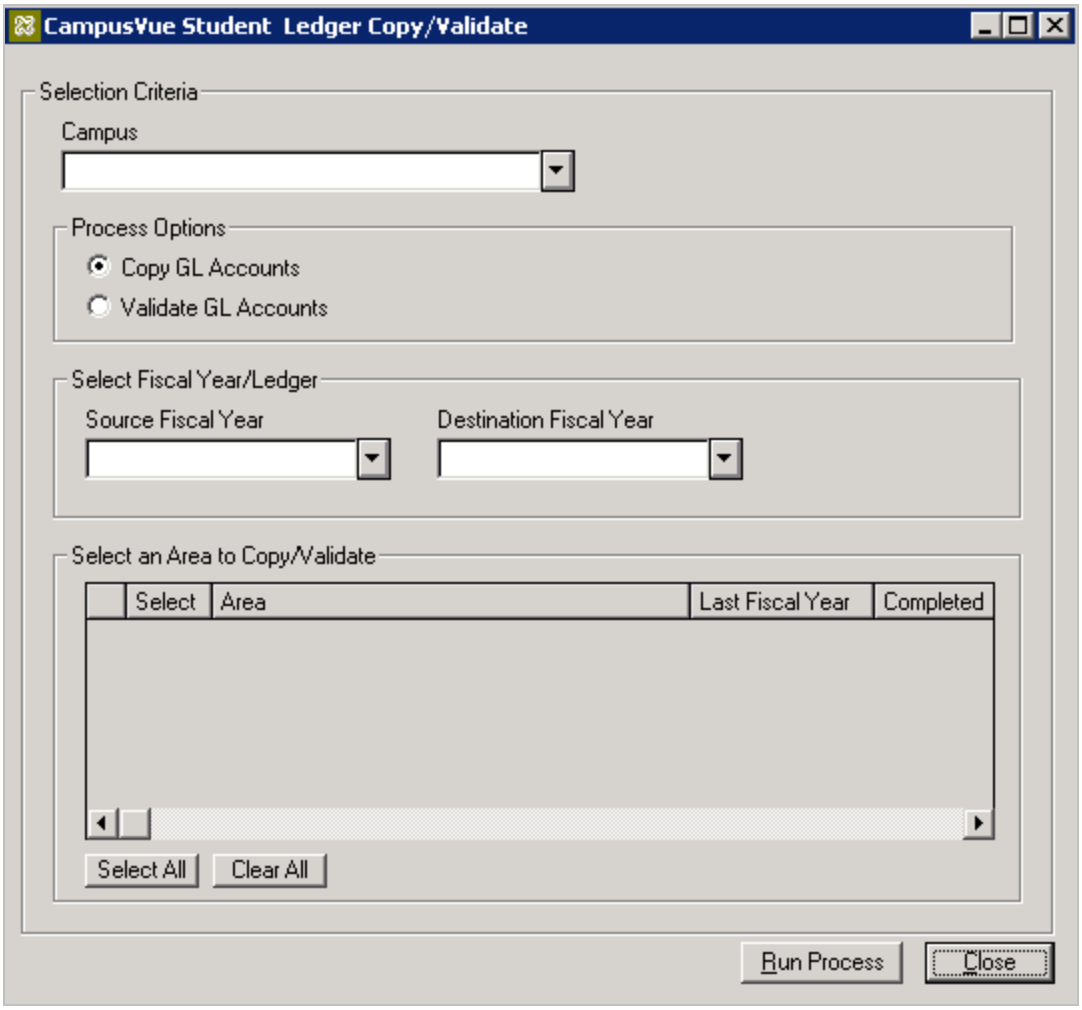
Note: This feature is only available to users with CampusVue Finance, HR & Payroll Integration who have security rights for the Student Accounts GL Link, Fund Sources, and Subsidiaries functionality.

To copy GL Account setups configured in one fiscal year to another for a specific campus:

1. Navigate to **Setup > CampusVue Finance > CampusNexus Student Ledger Copy/Validate**. The CampusNexus Student Ledger Copy/Validate form is displayed.

   Note: The following prerequisites must be met before proceeding further:

   - CampusVue Finance, HR & Payroll Windows Registry flag must be turned on.
   - Ledgers need to be configured in CampusVue Finance, HR & Payroll for the destination fiscal year.
   - Campus being copied must be associated with a journal entry group.



2. Select a **Campus**t. Only the campuses that you have access to are displayed.
3. Select **Copy GL Accounts**.
4. Select the **Source Fiscal Year**. The source year is limited to fiscal years currently set up in CampusNexus Student.
5. Select the **Destination Fiscal Year**. The destination year is limited to fiscal years that exist in CampusVue Finance, HR & Payroll and do not exist in CampusNexus Student for the areas being copied. This is to prevent the setup from being copied more than once for a particular fiscal year.
6. In the Select an Area to Copy/Validate section, select one area, all three areas, or any combination of areas to copy. You can only select multiple areas if the Last Fiscal Year matches. This is because the source fiscal year will be the same for all selected areas; the same is true for the destination fiscal year.

   You can select each area or click **Select All** to choose all three areas; likewise, you can clear each area or click **Clear All** to clear all three areas.
7. Click **Run Process**. The copy process copies all records in the relevant tables linked to the source fiscal year to the destination fiscal year. This occurs even if GL accounts are incorrect.

When the copy process is finished, a check mark will appear in the Completed column for the areas chosen (i.e., General Ledger Link Setup, Fund Sources GL Account Setup, and Subsidiary GL Account Setup).

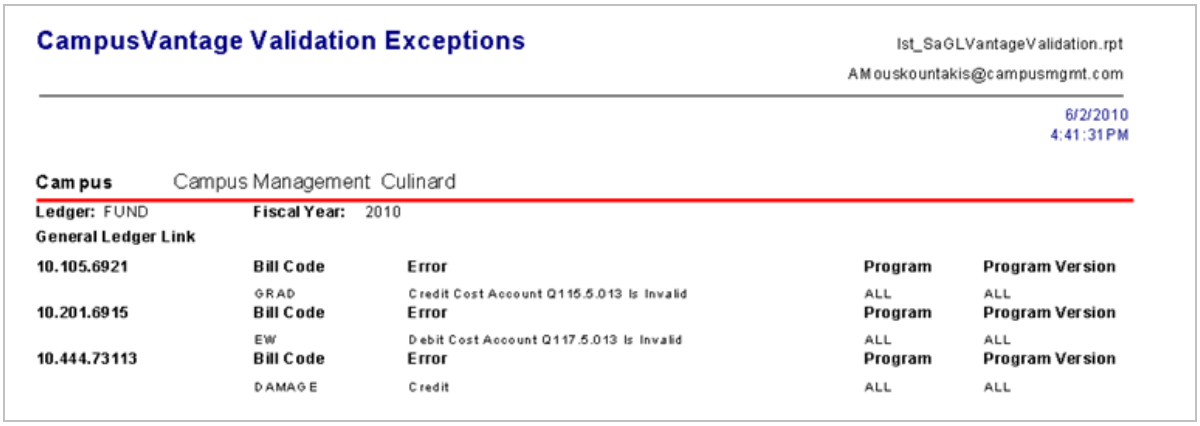
Records will be copied in Fund Sources and all GL accounts in the Source Fiscal Year chosen will be visible for the Destination Fiscal Year chosen for the same campus.

Validation Report

Once the copy process is complete and all records are committed, the CampusVantage Validation Exceptions report is displayed, displaying any errors that need to be corrected.

Each area (i.e., General Ledger Link Setup, Fund Sources GL Account Setup, and Subsidiary GL Account Setup) has its own section on the report because different information. If you choose to validate one area, the report displays errors pertaining to only that one area; if you choose all three areas for validation, a single report is displayed containing three sections, one for each area.

The errors in each area provide enough detail to allow you to navigate to the appropriate item and make the necessary corrections.



CampusVantage Validation Exceptions

lst_SaGLVantageValidation.rpt
AMouskountakis@campusmgmt.com
6/2/2010
4:41:31PM

Campus Campus Management Culinard

Ledger: FUND **Fiscal Year:** 2010

General Ledger Link

10.105.6921	**Bill Code**	**Error**	**Program**	**Program Version**
	GRAD	Credit Cost Account Q115.5.013 Is Invalid	ALL	ALL
10.201.6915	**Bill Code**	**Error**	**Program**	**Program Version**
	EW	Debit Cost Account Q117.5.013 Is Invalid	ALL	ALL
10.444.73113	**Bill Code**	**Error**	**Program**	**Program Version**
	DAMAGE	Credit	ALL	ALL

To correct errors in the General Ledger Link Setup:

1. Navigate to **Setup > Student Accounts**.
2. On the Additional tab, click **G/L Link**.
3. Select the appropriate campus and the appropriate fiscal year.

The following items are displayed: Fiscal Year, Campus Description, Transaction Code, Program, Program Version, and Reason.

To correct errors in the Fund Sources GL Account Setup:

1. Navigate to **Lists > Financial Aid > Fund Sources**.
2. Select the appropriate **Fund Source**.
3. Click **G/L Accounts/Refunds**.

The following items are displayed: Fiscal Year, Campus Description, Fund Source Code, Disbursements, Refunds, or Stipends, and Reason.

To correct errors in the Subsidiary GL Account Setup:

1. Navigate to **Lists > Student Accounts > Subsidiaries**.
2. Select the appropriate **Subsidiary**.

3. Click **G/L Setup**.

The following items are displayed: Fiscal Year, Campus Description, Subsidiary Code, GL Accounts or Refund GL Accounts, and Reason.

To run the validation report:

After you correct the errors, you can re-run the validation report to verify that the previously listed errors have been corrected.

1. Navigate to **Setup > CampusVue Finance > CampusNexus Student Ledger Copy/Validate**. The CampusNexus Student Ledger Copy/Validate form is displayed.
2. Select the **Areas** to validate (i.e., General Ledger Link Setup, Fund Sources GL Account Setup, and Subsidiary GL Account Setup).
3. Select a **Source Fiscal Year**, select **Validate GL Accounts**, and click **Run Process**. The validation report is displayed. Corrected items will no longer appear on the report.
4. Repeat Steps 2 -3 as needed.

Initial Configuration of CampusNexus Finance, HR & Payroll

To configure CampusNexus Student for integration with CampusNexus Finance, HR & Payroll:

1. Select Dynamics AX as the accounting system.

   Navigate to **Setup > Student Accounts > General tab**.

   a. In the GL/AP Package field, select CampusNexus Finance.

2. Select Main Accounts and dimension values so that transactions are appropriately recorded in the accounting system.

   Navigate to:

   a. **Setup > Students Accounts > Additional (tab) > GL Link (button)**.

      i. For each Campus, select the Default A/R Account.

      ii. Use Select GL Account to select Credit and Debit accounts for each Program/Program Version (Code).

   b. **Lists > Financial Aid > Fund Source (tab) > GL Accounts/Refunds/Stipends** and specify appropriate G/L accounts.

   c. **Lists > Student Accounts > Subsidiaries (tab)** and specify appropriate G/L accounts.

   d. **Lists > Student Accounts > Bank Codes (tab)** and specify appropriate bank codes and accounts.

   e. **Daily > Student Accounts > Miscellaneous Receipts** and use Power Search to select appropriate GL Debit and GL Credit accounts.

3. Create Financial Campus Groups in CampusNexus Student.

   Navigate to **Setup > Campus Locations > Campus Groups** and select the campuses that belong to a Financial Campus Group.

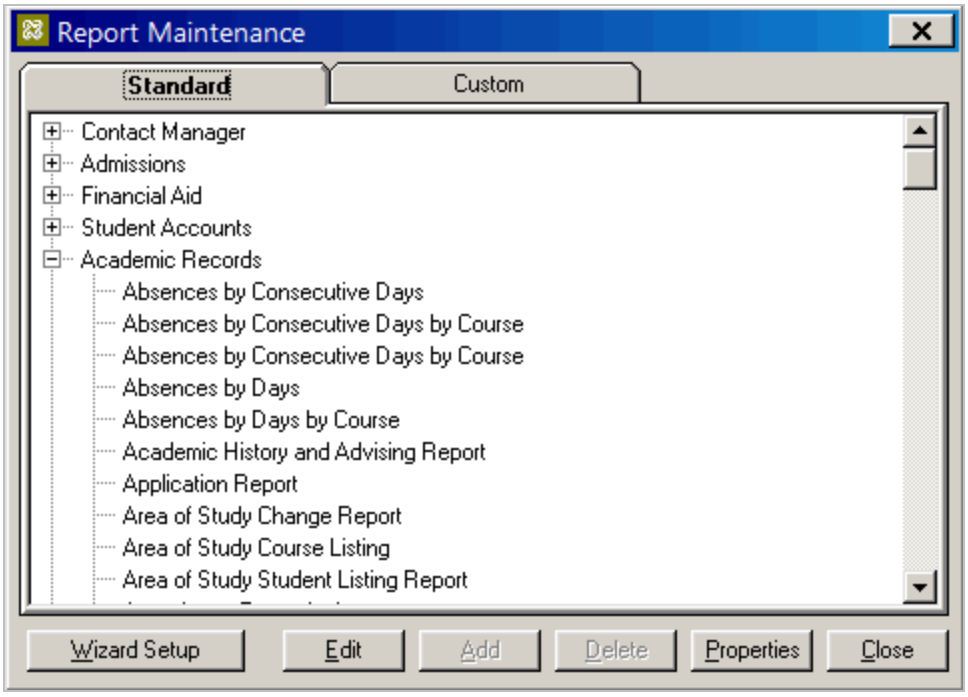
Setup > Report Maintenance

Crystal Reports software enables you to maintain and customize CampusNexus Student reports. You can change the layout of a standard report to add, move, or remove data from the reports. Your customized reports can be added to the Reports menu. When you modify a standard report, you make a copy of it and save it as custom report. The standard report is not modified.

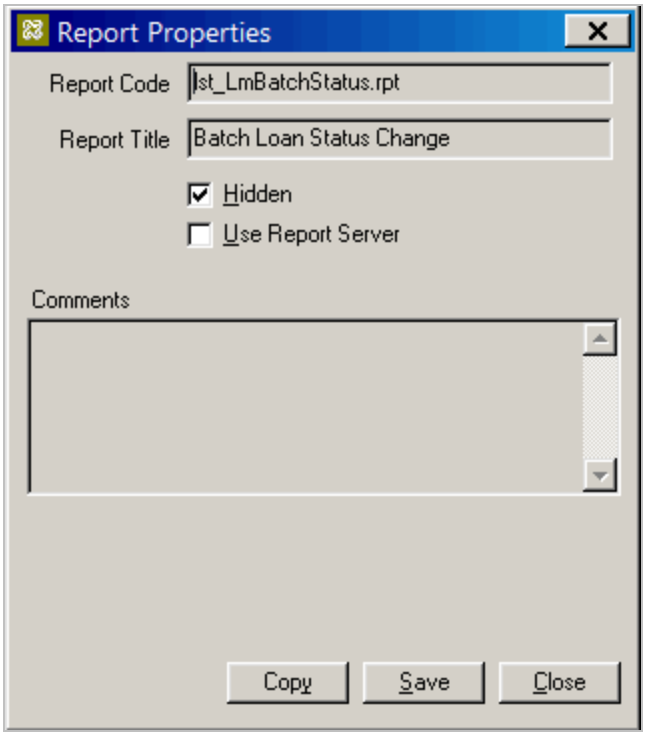
Note: The System Administrator must set up security rights to view, print, or export reports. Staff members and staff groups must be given security rights to view, print, and/or export reports. This does not apply to custom reports.

To prepare a report for customization:

1. Navigate to **Setup** > **Report Maintenance**. The Report Maintenance form is displayed. Select the **Standard** tab.
2. Click ⊞ to expand the appropriate report module.

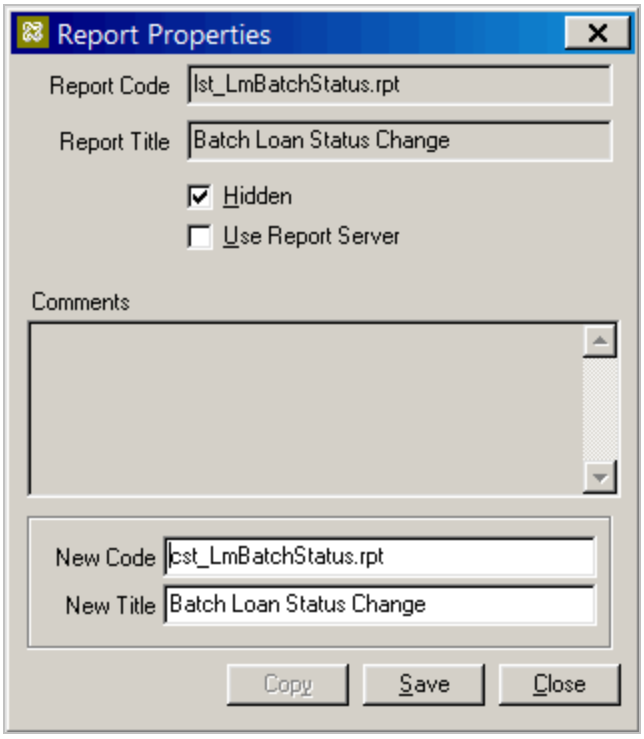


3. Double-click a report. The Report Properties form is displayed.



4. To remove the report from the Reports menu, select **Hidden**.
5. To automatically send the selected report to your alternative server, select **Use Report Server**.

   Note: The Report Server must be set up under Setup > Campus Locations > Campus Information > Options.
6. Click **Copy**. The New Code and New Title fields appear at the bottom of the form. The New Code prefix `cst_` marks the report as a custom report.

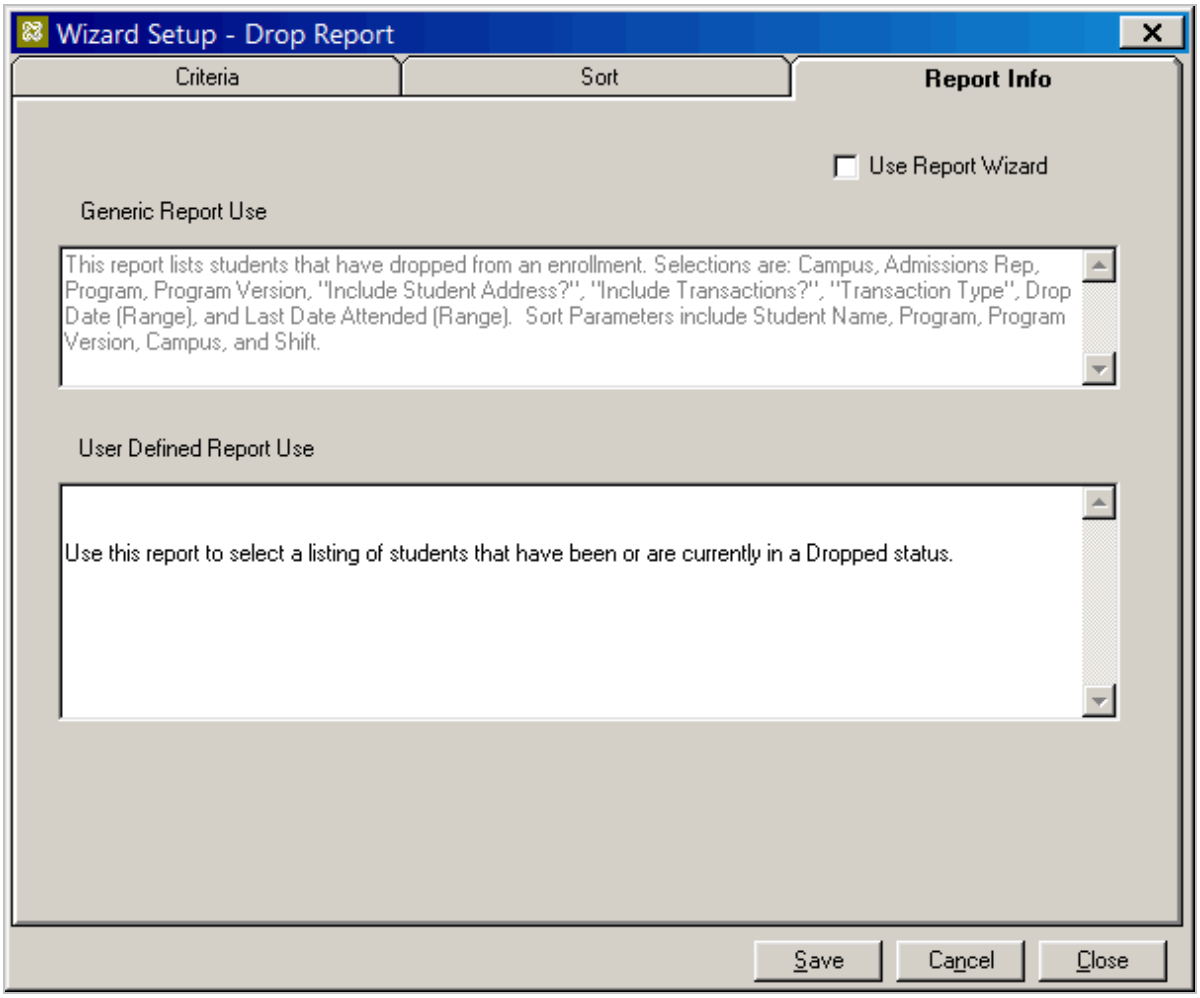


7. Modify the **New Code** and **New Title** as needed.
8. Click **Save**.

   The report is saved under the menu option Reports > Custom. You can modify the custom report with Crystal Reports software.

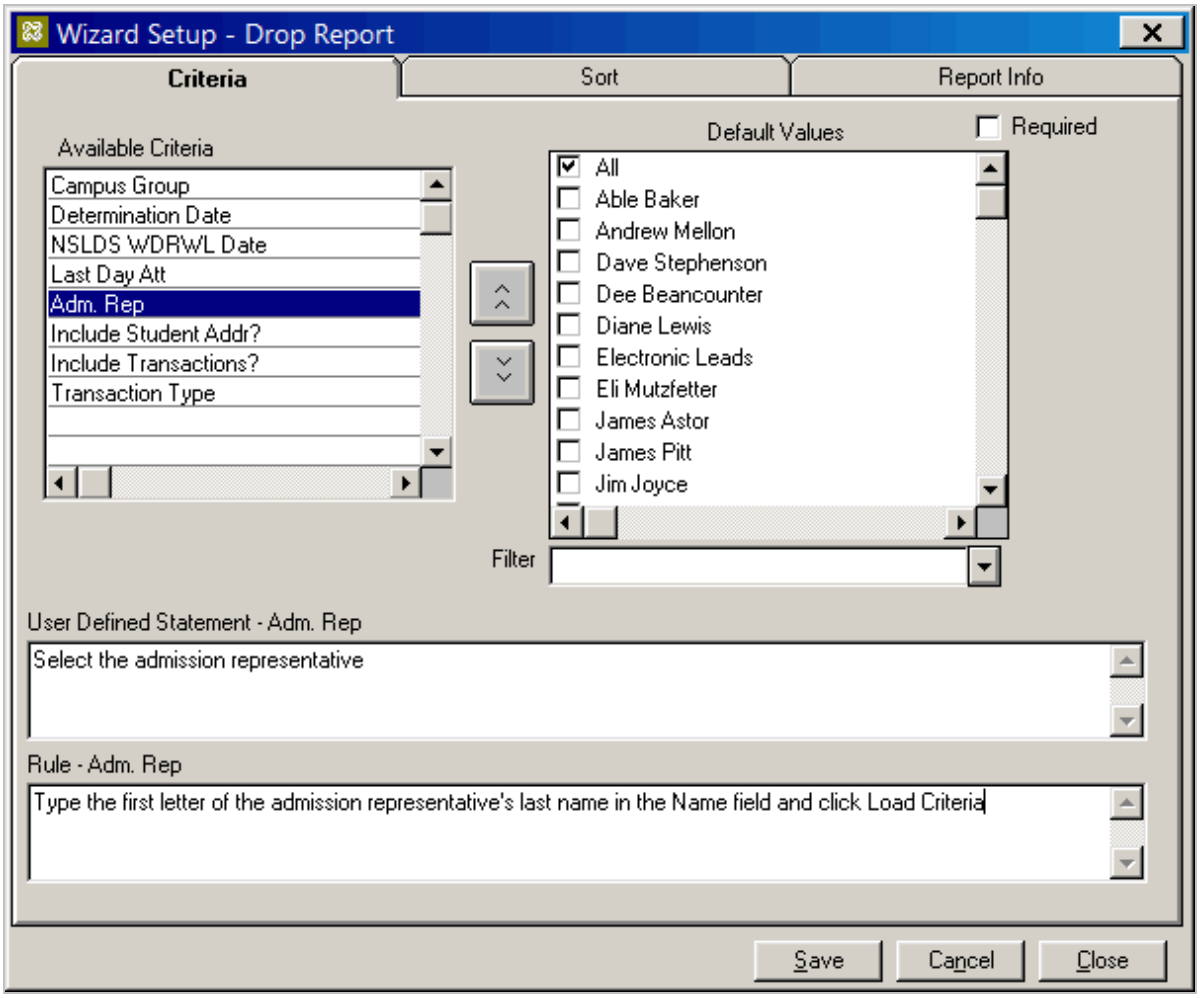
To add a custom report to the Report Wizard:

1. Navigate to **Setup** > **Report Maintenance**. The Report Maintenance form is displayed.
2. Click ⊞ to expand the appropriate report module.
3. Highlight a report and click **Wizard Setup**. The Wizard Setup form for the selected report is displayed.

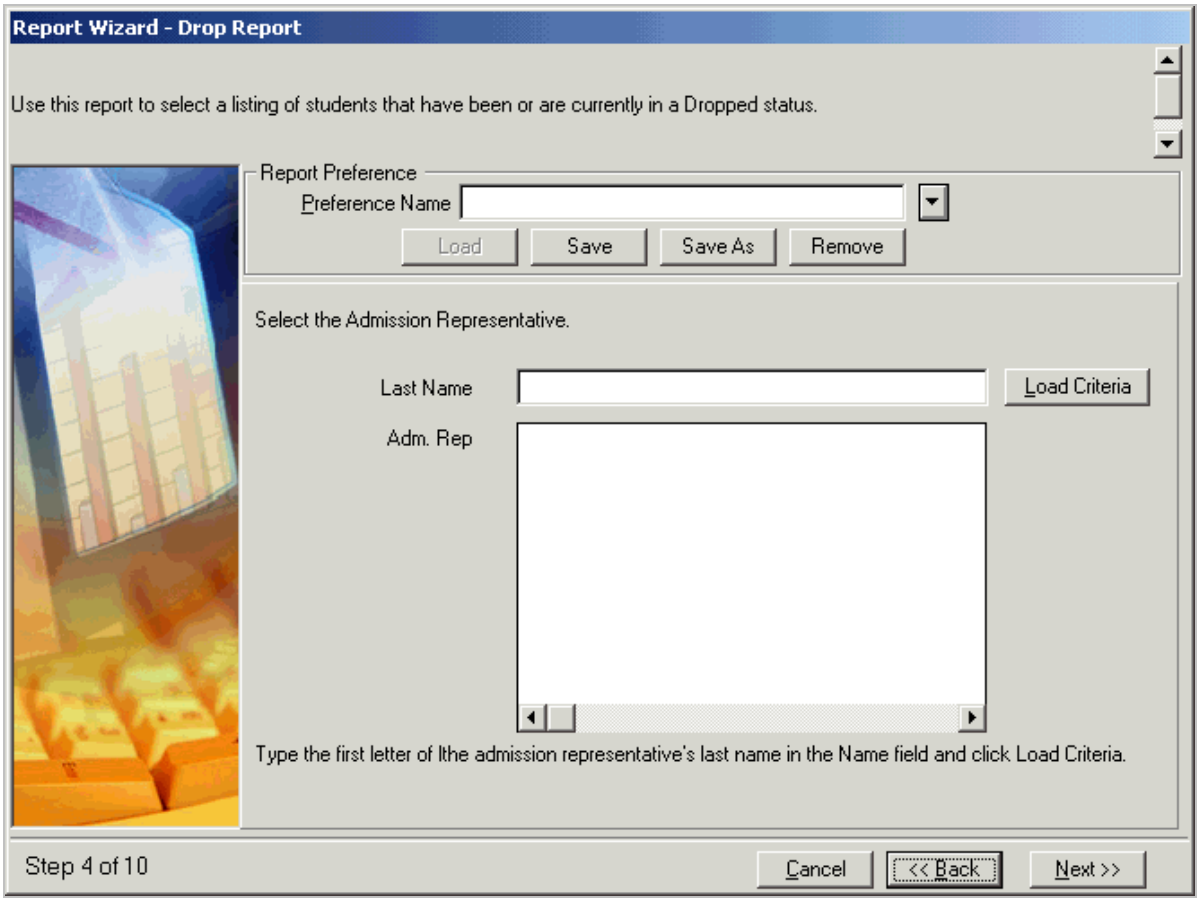


4. On the Report Info tab, select the **Use Report Wizard** check box.
5. In the **User Defined Report Use** box, specify the information that you want to be displayed at the top of the Wizard when the report is run.
6. On the Criteria tab, from the Available Criteria list, select the item that you modified in your custom report and specify a **User Defined Statement** for that item. Repeat this step for each modified item.

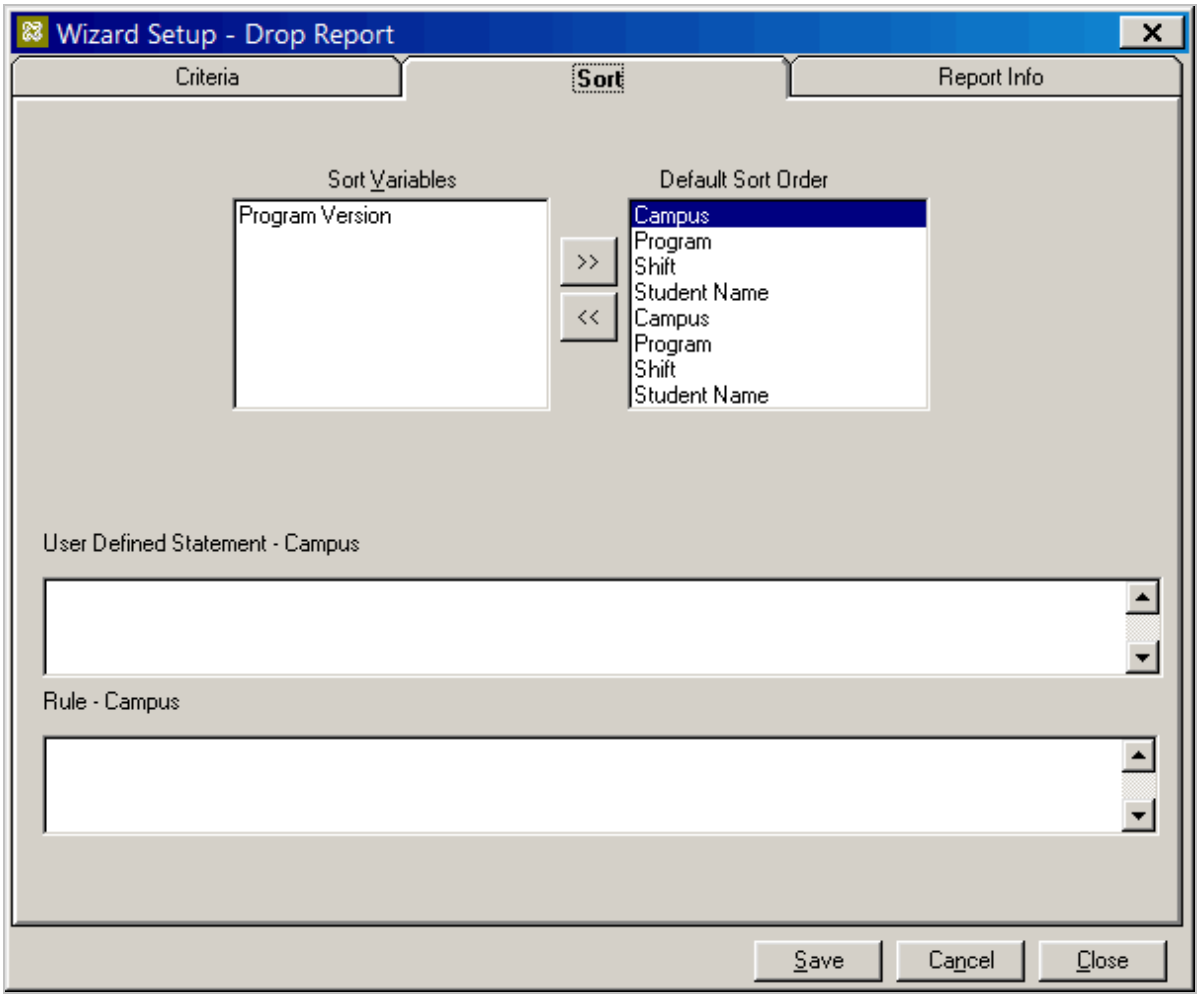
   In our example, we associated a user-defined statement with Adm Rep. Since we have many admission representatives, we added a filter to speed up the search. We chose the last name as our filter and added a rule comment to explain the filter.



When the Report Wizard is run, the last name filter is displayed as shown below.



7. On the Sort tab, select a variable in the **Sort Variable** list and click >> to move the variable to the Default Sort Order list.



8. Click **Save**.
9. A confirmation message is displayed. Click **OK**.

Setup > Web Interface (Legacy)

The CampusNexus Student Web Interface gives your school a means to let students, staff members, and employers access the system via the Internet. After the interface is configured, students, staff members, and employers can access system data. Access to the Web Interface is secured by Student IDs and PIN numbers for students, user codes and passwords for staff members, and Employer Codes and PIN number for employers.

Anthology Inc. has prepared a white paper titled *Web Interface Setup for CampusNexus Student*. We recommend that you read this document before attempting to set up your Web Interface. If you have any questions about the setup procedure, please consult with our support department.

When you navigate to Setup > Web > Web Interface (Legacy), the Web Interface form is displayed. It contains the following tabs:

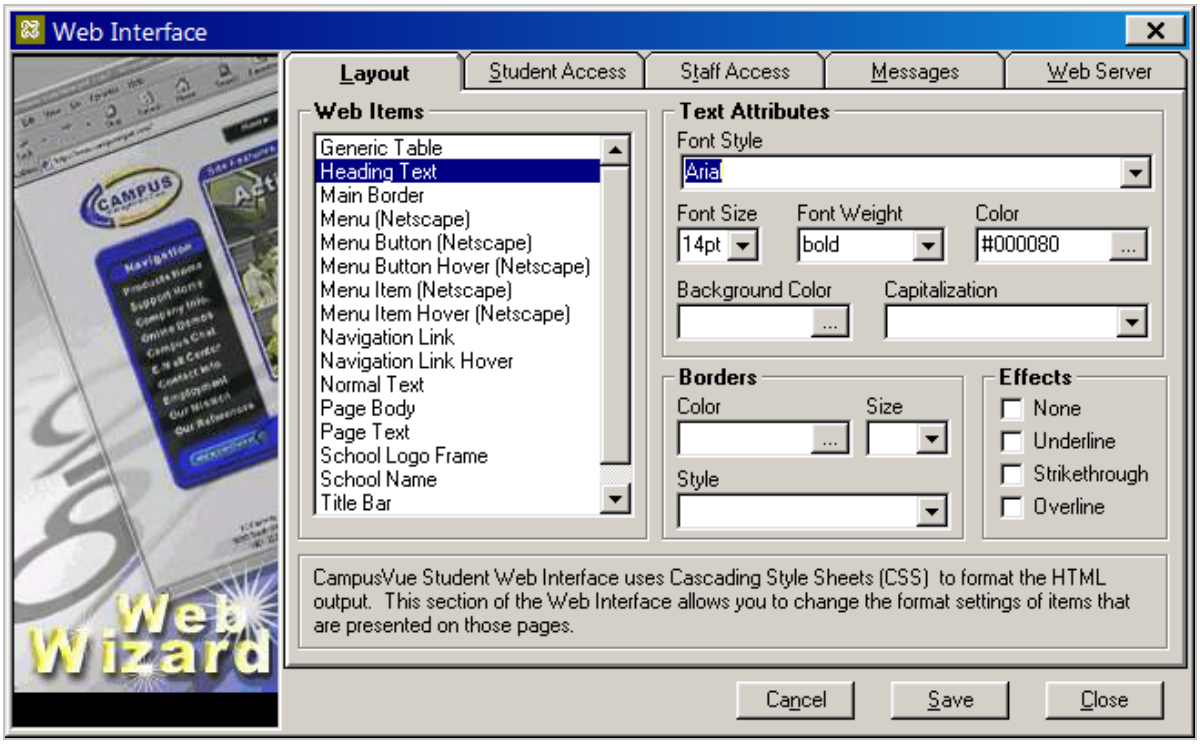
- Layout
- Student Access
- Staff Access
- Messages
- Web Server

Web Interface - Layout Tab

Use the Layout tab of the Web Interface form to select the items used on your website and to define text attributes, borders, and effects for the items. The selected settings are saved in a Cascading Style Sheet (CSS).

To specify the layout of your website:

1. Navigate to **Setup > Web > Web Interface (Legacy)**. The Web Interface form is displayed. Select the **Layout** tab.



2. Select an item in the **Web Item** list box. The attributes that apply to the selected web item are enabled.

Web Item Attributes

Web Item	Attributes
Text Attributes	Font Style
	Font Size
	Font Weight
	Color
	Background Color
	Capitalization

Web Item	Attributes
Borders	Color
	Size
	Style
Effects	None
	Underline
	Strikethrough
	Overline

3. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.
4. Select the **Web Server** tab and click **Build Pages** to update your website.
5. Click **Close** to close the form.

Note: The Cancel button applies only to the Layout tab of the Web Interface form. If you edit the form and attempt to close it without saving, CampusNexus Student prompts you to save.

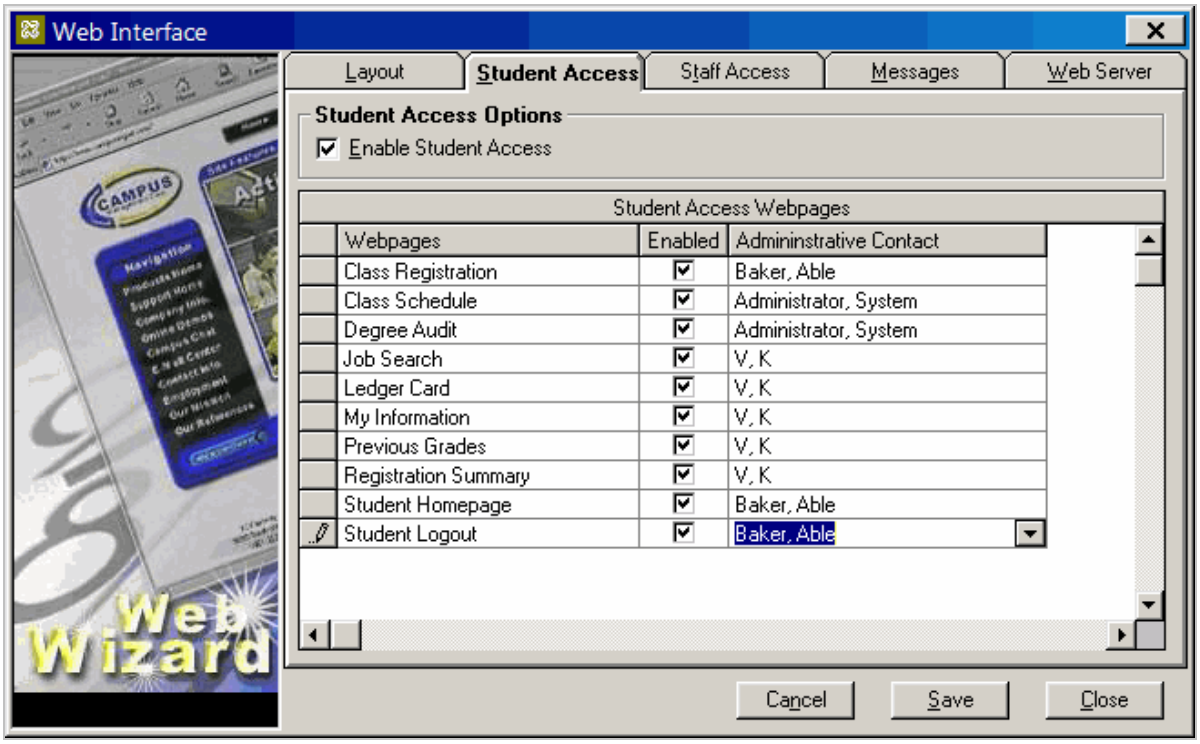
Web Interface - Student Access Tab

Use the Student Access tab of the Web Interface form to specify whether you want to provide students with online access to some their information in CampusNexus Student. If you choose to allow students some access to their information, you can then select which information they can view or change.

If you choose any of the student access options, students must login to your website with a Student ID and a PIN. If a student forgets the Student ID or PIN, a method is available online for the student to supply sufficient identity information to have the credentials e-mailed to the student.

To configure student access for your website:

1. Navigate to **Setup > Web > Web Interface (Legacy)**. The Web Interface form is displayed. Select the **Student Access** tab.



2. Select or clear **Enable Student Access**.
3. Select or clear **Enabled** on each row of the grid.
4. Click in the **Administrative Contact** fields of each row and click to select a contact.
5. Click **Save**.
6. Select the **Web Server** tab and click **Build Pages** to update your website.
7. Click **Close** to close the form.

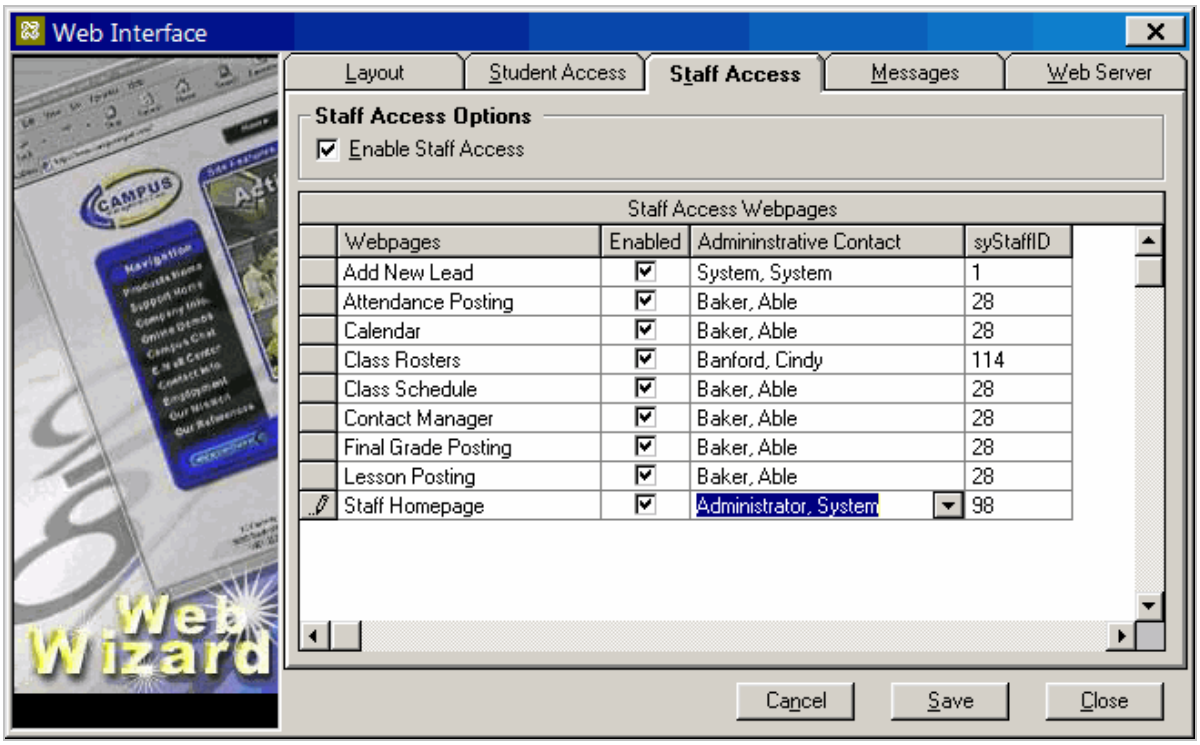
Note: The Cancel button applies only to the Layout tab of the Web Interface form. If you edit the form and attempt to close it without saving, CampusNexus Student prompts you to save.

Web Interface - Staff Access Tab

Use the Staff Access tab of the Web Interface form to specify whether you want to provide staff with online access to information in CampusNexus Student. When staff access is enabled, each staff member can log in to your website by entering the same user ID and password that he or she uses when logging in to CampusNexus Student.

To configure staff access for your website:

1. Navigate to **Setup > Web > Web Interface (Legacy)**. The Web Interface form is displayed. Select the **Staff Access** tab.



2. Select or clear **Enable Staff Access**.
3. Select or clear **Enabled** on each row of the grid.
4. Click in the **Administrative Contact** fields of each row and click to select a contact.
5. Click **Save**.
6. Select the **Web Server** tab and click **Build Pages** to update your website.
7. Click **Close** to close the form.

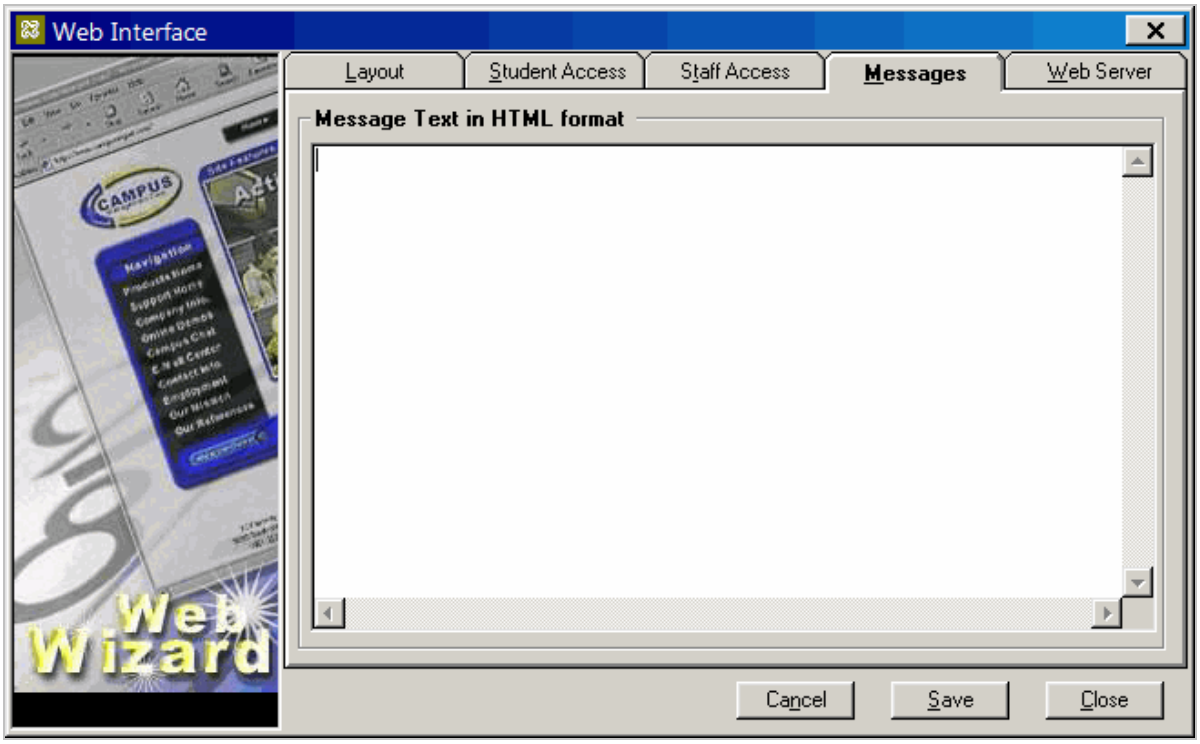
Note: The Cancel button applies only to the Layout tab of the Web Interface form. If you edit the form and attempt to close it without saving, CampusNexus Student prompts you to save.

Web Interface - Messages Tab

Use the Messages tab of the Web Interface form to create general messages for display on the home page of your website.

To create a home page message for your website:

1. Navigate to **Setup > Web > Web Interface (Legacy).** The Web Interface form is displayed. Select the **Messages** tab.



2. Type the text of your message in the text box on the form. Use standard HTML coding to control the appearance of your message when it is viewed by visitors to your website's home page.
3. Click **Save**.
4. Select the **Web Server** tab and click **Build Pages** to update your website.

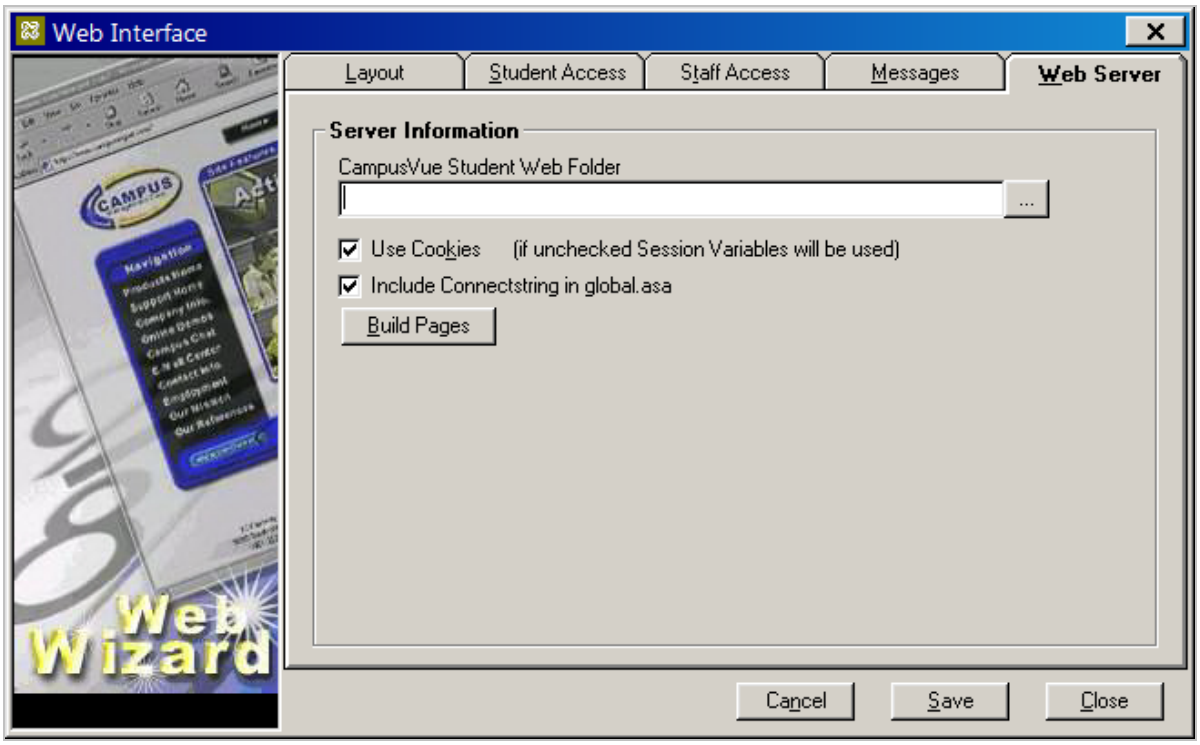
Note: The Cancel button applies only to the Layout tab of the Web Interface form. If you edit the form and attempt to close it without saving, CampusNexus Student prompts you to save.

Web Interface - Web Server Tab

Use the Web Server tab of the Web Interface form to designate the location of your CampusNexus Student Web Folder and to select whether cookies and connect strings are used. This tab also contains the build tool that creates Cascading Style Sheets (CSS) and HTML pages for your website.

To designate the location of your web folder and build your web pages:

1. Navigate to **Setup > Web > Web Interface (Legacy)**. The Web Interface form is displayed. Select the **Web Server** tab.



2. Click ... to navigate to the CampusNexus Student Web Folder.
3. Select or clear **Use Cookies**.

   The CampusNexus Student Web Interface is initially configured to use session states to maintain "state" (keep track of who is doing what). We recommend that you select this option if you have a web server farm.
4. Select or clear **Include Connectstring in global.asa**.

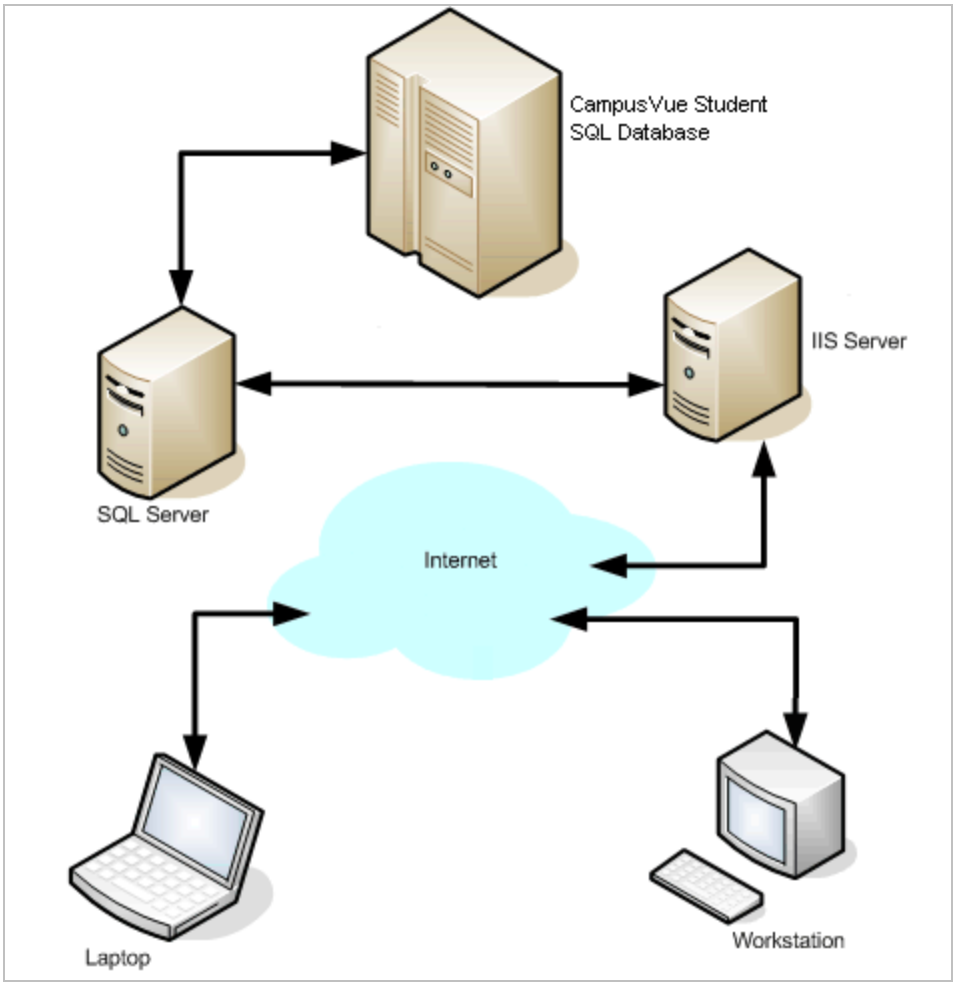
   Among other variables in the global.asa file, the Connectstring contains the location of the CampusNexus Student SQL database. If this option is cleared,CampusNexus Student uses the database key contained in the server registry instead of the connect string. This enhances the security of the web Interface by keeping this database location information hidden from users. This option is selected by default. We recommend that you clear this option.
5. Click **Save**.
6. Click **Build Pages** to convert the design parameters for your website into CSS and HTML files.
7. Click **Close** to close the form.

Note: The Cancel button applies only to the Layout tab of the Web Interface form. If you edit the form and attempt to close it without saving, CampusNexus Student prompts you to save.

Web Interface Concepts

The web interface for CampusNexus Student generates web pages that contain student, staff, and employer information from the CampusNexus Student database. The system administrator sets up your web pages under the Setup > Web Interface (Legacy) menu option in CampusNexus Student.

Students, staff members, and employers connect to your web pages via the Internet using an address that your institution provides. All users require user IDs and passwords or PINs to access to these pages. Some of the CampusNexus Student data is for display only, but under controlled circumstances, some data may be added, changed, and deleted by all three types of users.



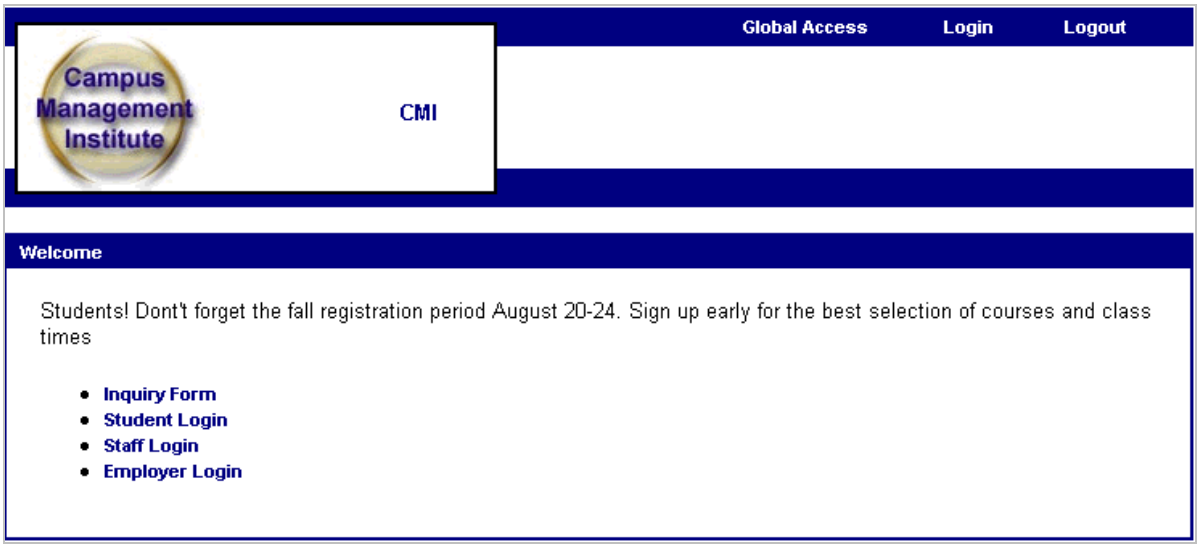
Web Interface Security

The security features that are used in CampusNexus Student are implemented for the web interface. For staff access to the web interface, the pages are controlled by the same security settings as in CampusNexus Student.

All staff web pages are linked to a CampusNexus Student menu option. If the user (staff member) does not have access to a menu option in CampusNexus Student, the link is not added to the user's web page. The display, add, edit, and delete options are used to control the web interface menu and forms that are displayed for each user.

Home Page

All users of your website are directed to the home page. For more information, see Home Page.



Inquiry Form

Persons requesting information about your institution can enter demographic information such as name, address, and area of interest on this page. The submitted data is placed in a file of electronic leads that can be viewed and processed by your Admissions department. For more information, see Web Inquiries.

Staff Services

Staff services include features that are commonly used by staff members when they are working directly with CampusNexus Student. Staff services include attendance posting, class rosters, class schedules, final grade posting, staff calendar, student information, and Contact Manager. For more information, see Staff Services.

Student Services

Student services include features that are useful to your students. The web-based student services include the menu options My Information, Online FAFSA, Class Registration, Class Schedule, Degree Audit, Ledger Card, Previous Grades, and Registration Summary. For more information, see Student Services.

Employer Services

Employer services consist mainly of allowing the employers used in your Career Services Department to update their job listings to add, edit, and delete jobs available to your graduates, externs, interns, and volunteers. For more information, see Employer Services.

Universal Fonts Now Available for all Web Interface Users

Anthology Inc. provides a font list for all users regardless of user printer drivers. The list is universal, containing the common available Windows fonts.

Internet Information Server (IIS)

Before the members of your institution can take advantage of the CampusNexus Student web interface, you must set up the Microsoft Internet Information Server (IIS). Follow the steps to initialize IIS for use with CampusNexus Student. You must be a system administrator to perform these steps.

Examples of the setup procedure use `AppServer` as the name of the server where CampusNexus Student resides and `WebServer` as the name of the server where IIS resides. Substitute the names of your application server and web server for these names.

Note: Refer to the Product Compatibility matrix at http://www.mycampusinsight.com/Releases/Pages/Compatibility.aspx to identify supported versions of the SQL and IIS servers.

To initialize IIS for use with CampusNexus Student:

1. On `AppServer`, install the CampusNexus Student business objects.
2. Install the Microsoft SQL database. It can be installed on `AppServer` or a different server.
3. Install IIS on `WebServer`. The process of installing IIS creates a folder named `\\WebServer\C$\Inetpub\wwwroot\`. The CampusNexus Student web application can reside in this directory. Otherwise, you can create another virtual root directory to contain your website.
4. In the virtual root folder on `WebServer`, create a `_temp` folder with full permissions for an anonymous user.

   Example: `\\WebServer\C$\Inetpub\wwwroot\_temp\`.

   The CampusNexus Student Web application writes temporary files to this folder.
5. From `WebServer`, run `\\AppServer\c2000\ComPlus\CampusVue.msi`.
6. From `WebServer`, run `\\AppServer\c2000\ComPlus\c2000IIS.msi`.

These steps prepare the web server to receive the web pages from the CampusNexus Student application. Continue the setup process from within CampusNexus Student. For more information, see Setup > Web Interface.

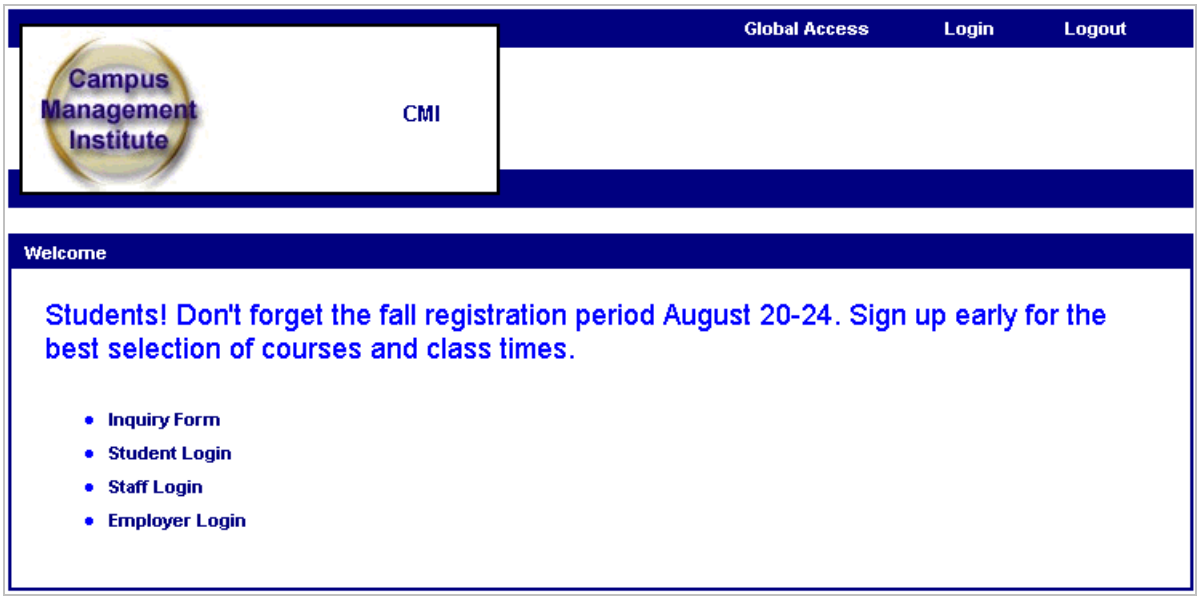
Important Operations Note

Each time you receive an update of CampusNexus Student (new release or service pack), steps 5 and 6 of the procedure above must be executed again. You must also run the Build Pages command on the Web Interface - Web Server Tab.

Home Page

From within CampusNexus Student, you can design a set of web pages for your institution that provide access to information contained in your databases. Your faculty and staff members, students, and employers can gain access, in a secure environment, to data related to their activities. All who have access to your web pages must log in with an identifier and a password or personal identification number (PIN). Once a website visitor has logged in, and depending on the role in which he or she logged in that person can view, and in some cases update, data in CampusNexus Student. The design of your web pages is controlled through the Web Interface - Layout Tab.

When a visitor gets to your home page, several access options are available.



Global Access

The Global Access menu contains options that do not require a login. The Welcome Page option returns the user to the home page of the website. The Inquiry Form option opens a form with which the user can submit a request for information about your institution.

Login

The Login menu offers an alternative method of selecting a login page. There are login options for students, staff members, and employers.

Logout

The Logout option on the main menu is used to terminate the user's activity and return to the Welcome (home) page.

Note: A user will be automatically logged out after 20 minutes of inactivity on any web page controlled by this system. The user is returned to the website home page.

Welcome Page

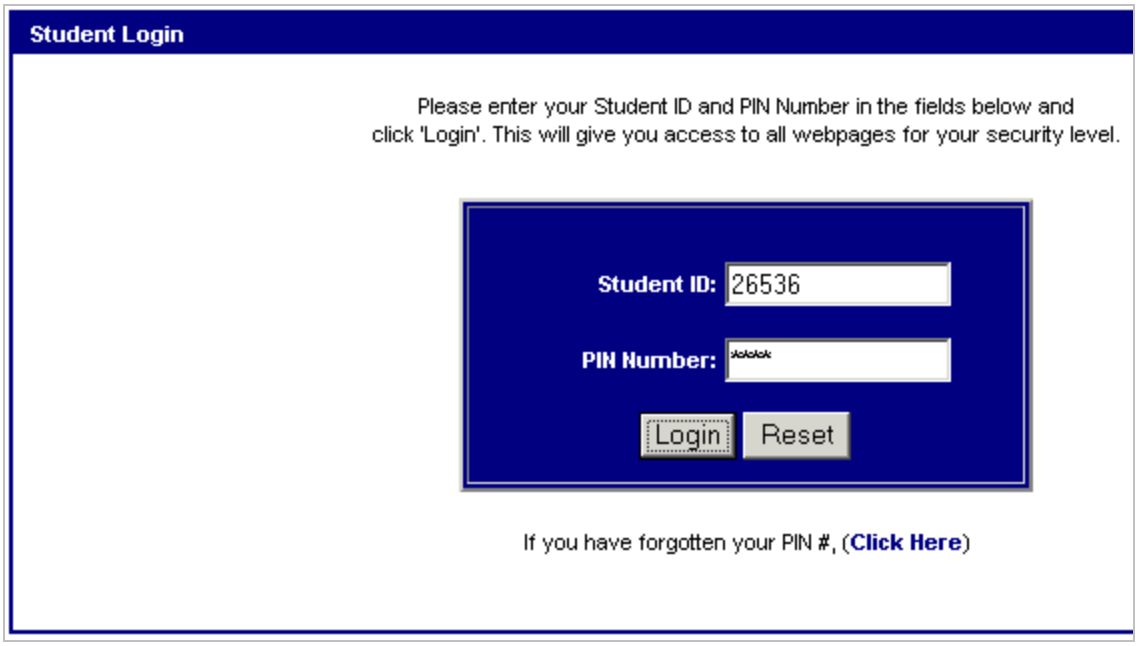
The Welcome page contains broadcast messages. Bulletin-board style messages are shown on your home page. The messages are entered in HTML format via the Web Interface - Messages Tab.

Inquiry Form

This option opens a form with which interested parties can inquire about your institution. When the form is processed, an electronic lead record is created in CampusNexus Student's database. This is not the same thing as a "New Lead" which is entered manually through CampusNexus Student. The electronic lead records are reviewed by an Admissions Department representative before a student (new lead) record is created. For more information, see Web Inquiries.

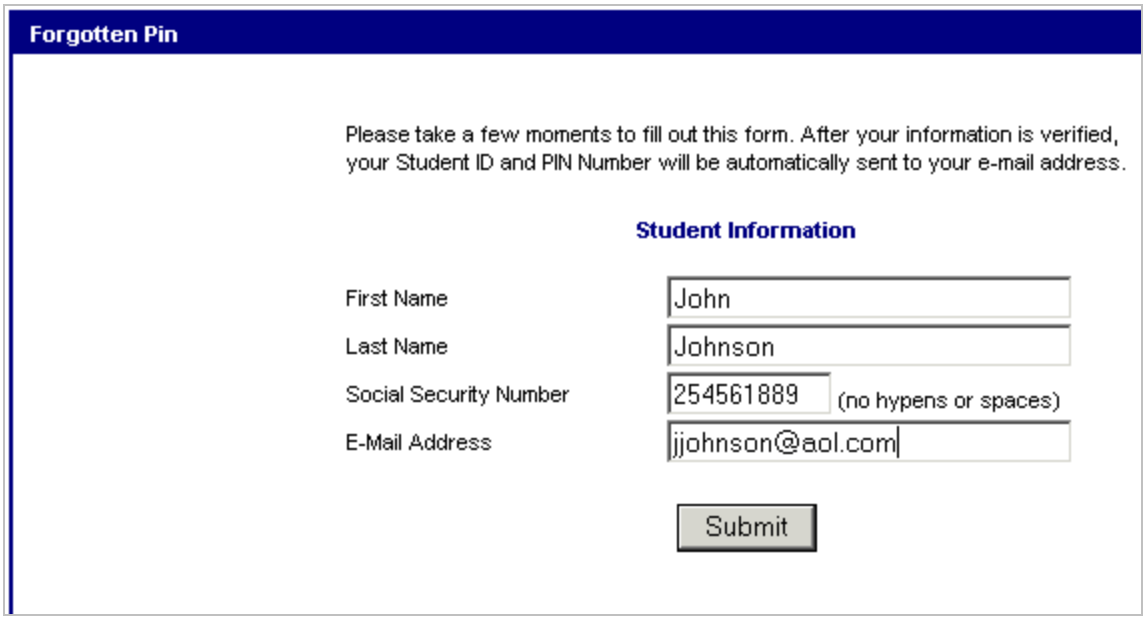
Student Login

The Student Login option leads to a login form for students.



Once a student has logged in using a Student ID and PIN, the Student Services home page opens with additional menu options. Your institution controls the options that appear on the Student Services page via the Web Interface - Student Access Tab. For more information, see Student Services.

If a student forgets his or her ID and PIN, the student submits the form below. If the data on the form matches the student's data in the CampusNexus Student database, an email message containing the ID and PIN is sent to the student.

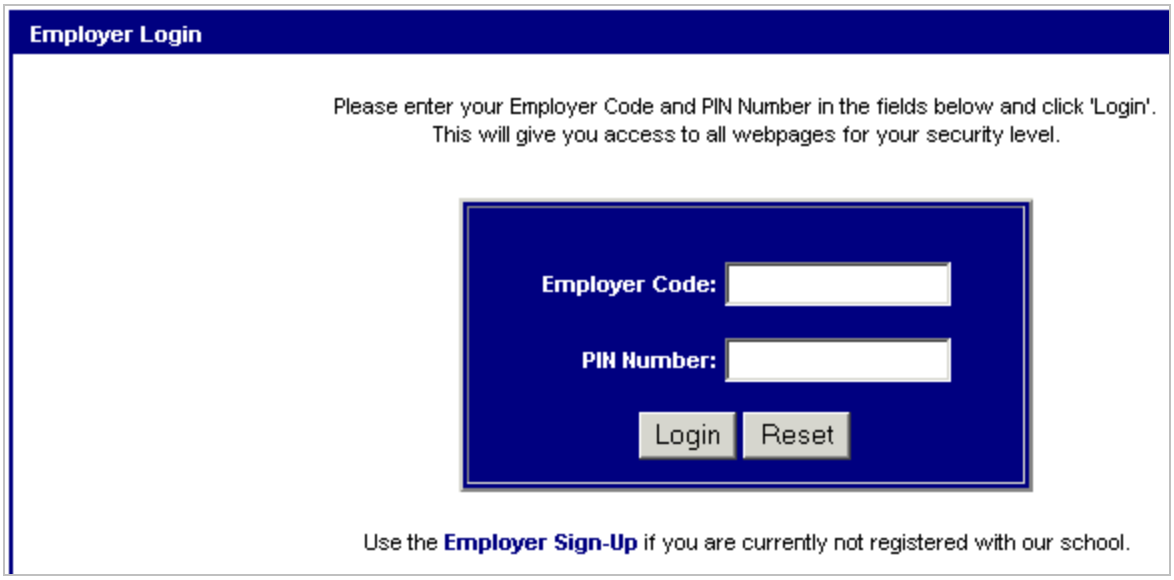


Staff Login

The Staff Login option leads to a login form for staff members. Once a staff member has entered a user ID and password (the same codes used to enter CampusNexus Student through a workstation), the Staff home page opens with additional menu options. Your institution controls the options that appear on the Staff home page via the Web Interface - Staff Access Tab. For more information, see Staff Home Page.

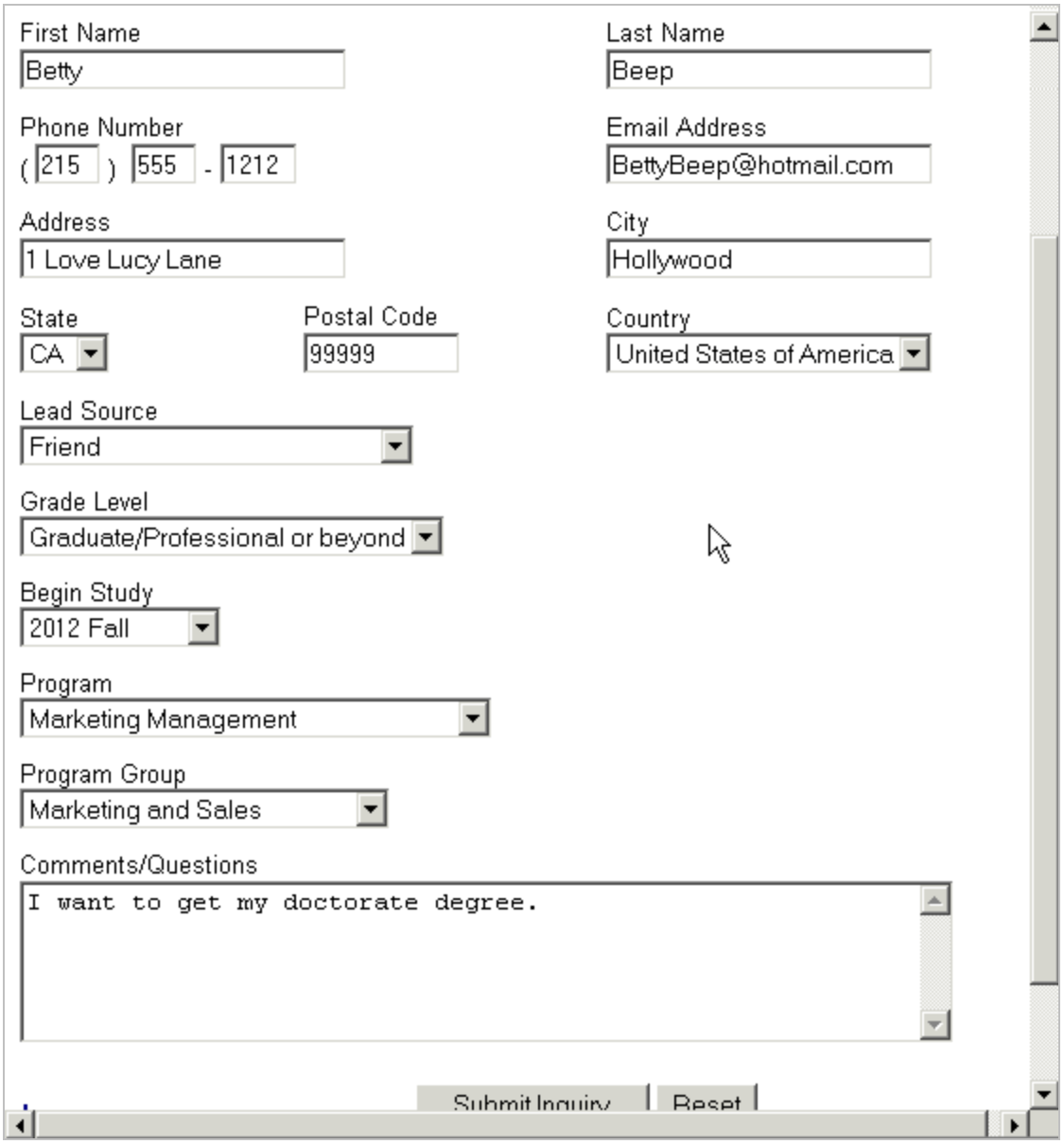
Employer Login

The Employer Login option leads to a login form for your employers. The employer needs an Employer Code and a PIN (assigned by your institution) to gain access to the Employers home page. From the Employer home page, an employer can add or edit available jobs. For more information, see Employer Home Page.


Employer Login
Please enter your Employer Code and PIN Number in the fields below and click 'Login'.
This will give you access to all webpages for your security level.
Employer Code:
PIN Number:
Login
Reset
Use the Employer Sign-Up if you are currently not registered with our school.

Web Inquiries

The Inquiry option opens a form with which interested parties can inquire about your institution. When the form is processed, an electronic lead record is created in the CampusNexus Student database. This is not the same thing as a "New Lead" entered manually through CampusNexus Student. The electronic lead records are reviewed by an Admissions Department representative before a student record is created. Refer to the example below.

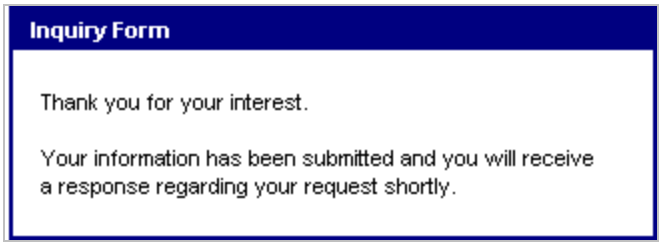


The list boxes on the Inquiry form contain data from CampusNexus Student list tables.

- State
- Lead Source
- Grade Level
- Begin Study (The terms listed are controlled in Term Code Setup.)
- Program (desired major)
- Program Group (Interests)
- Comments

The Reset button on the Admissions Inquiry form clears any entered data but leaves the form open for new data.

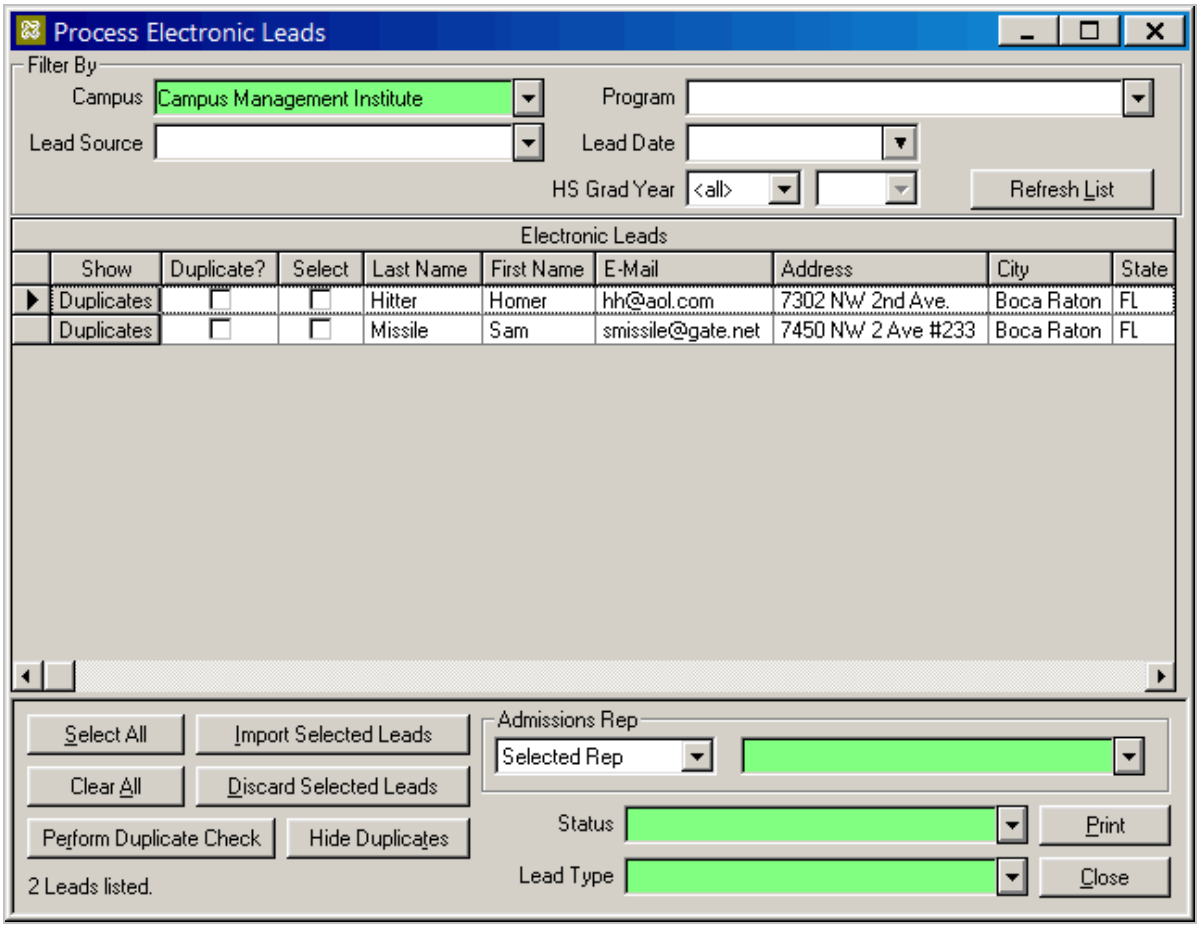
When the inquiry is submitted, the information is captured in the electronic lead records table, and a confirmation message is displayed.



The person making the inquiry can then return to the website home page by clicking Welcome Page on the Global Access menu.

Processing Electronic Leads

A staff member in the Admissions Department must regularly review entries in the electronic leads table to ensure a prompt response. In CampusNexus Student, the electronic inquiries are accessed through Daily > Admissions > Process Electronic Leads. The staff person may choose to contact the inquirer or convert the inquiry data to a new lead in CampusNexus Student. The inquirer then enters the institution's normal lead-processing cycle.

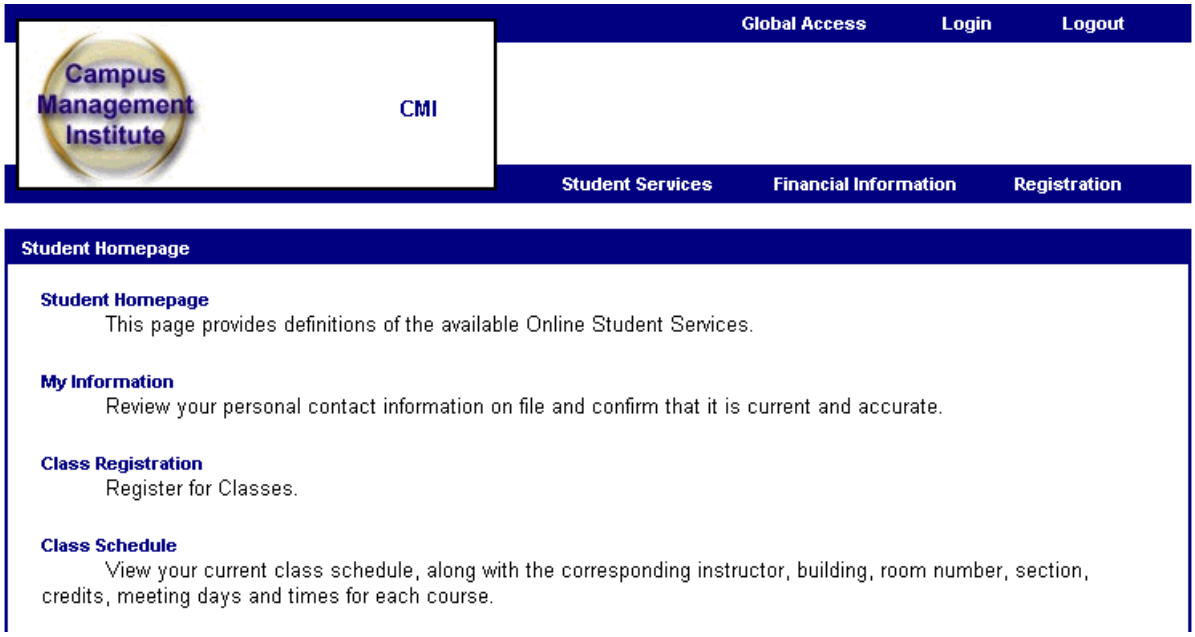


Student Home Page

Once a student has logged on using a student ID and PIN, the Student Services home page opens with several additional menu options. Your institution controls the options that appear on the Student Services page via the Web Interface - Student Access Tab in CampusNexus Student. The options may include:

- My Information
- Ledger Card
- Class Registration
- Registration Summary
- Class Schedule
- Degree Audit
- Previous Grades
- Online Payment

In addition, there are some useful utility resources on this page such as a weather site, search engines, and www.amazon.com.



All of the options that are listed and described in the Student Home Page window are also represented on the three menus of the student menu bar. A student can select any of these options to go to the appropriate student-specific web page.

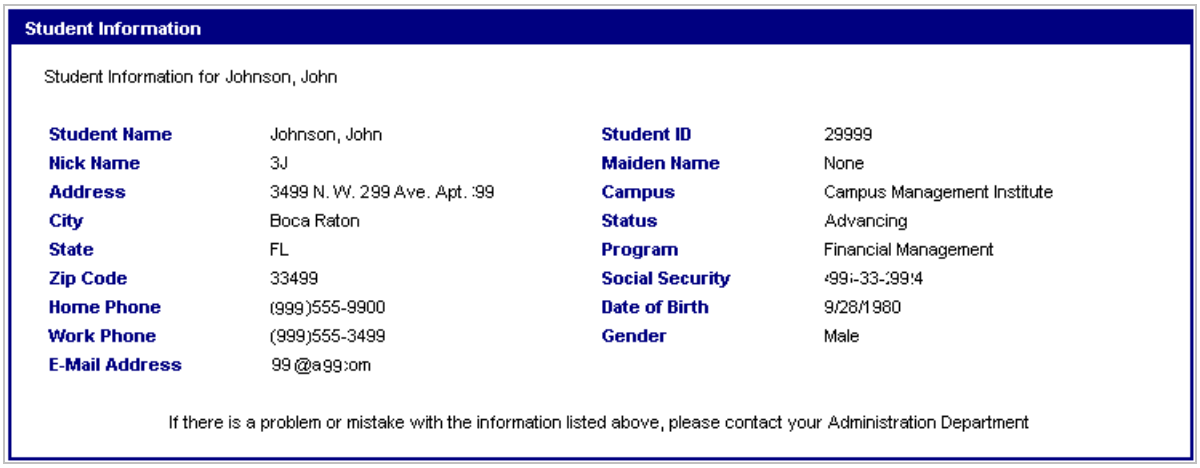
Student Services Menu

Financial Information Menu

Registration Menu

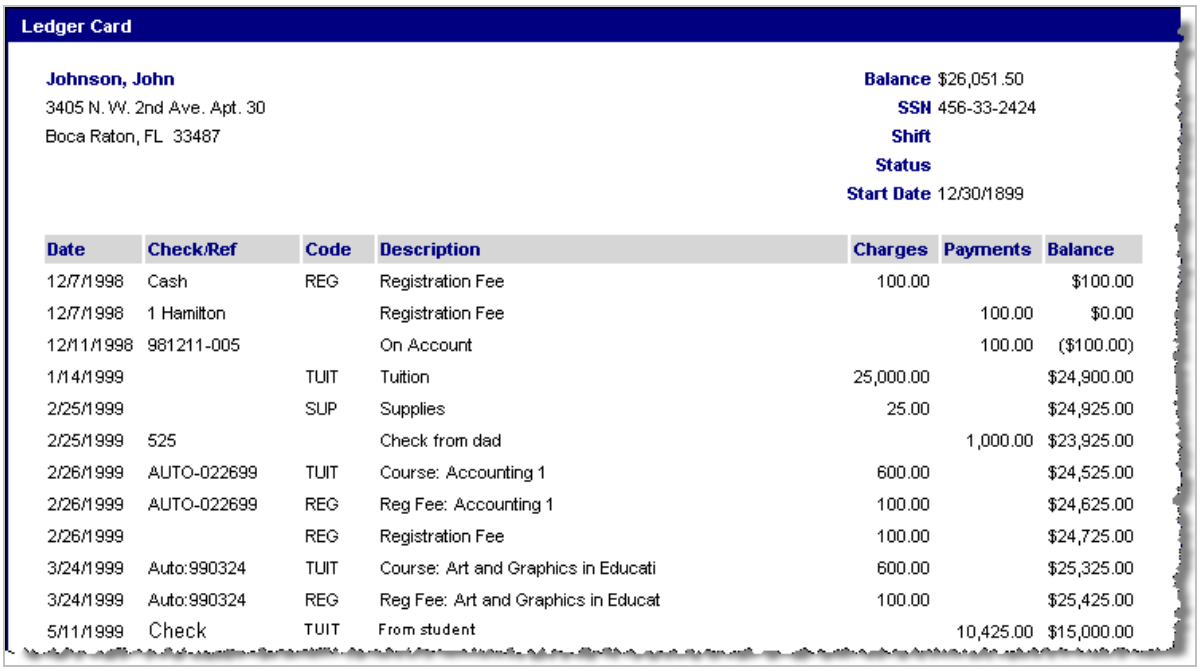
My Information

This is a read-only form. The student can view information that is currently on file at the institution. If the student notes anything on the form that needs a change, the student needs to contact the institution's Administration Department to have the information corrected.



Ledger Card

This option displays the student's ledger card in read-only format. The student's current balance is shown in the upper right corner of the page.



Ledger Card

Johnson, John
3405 N. W. 2nd Ave. Apt. 30
Boca Raton, FL 33487

Balance $26,051.50
SSN 456-33-2424
Shift
Status
Start Date 12/30/1899

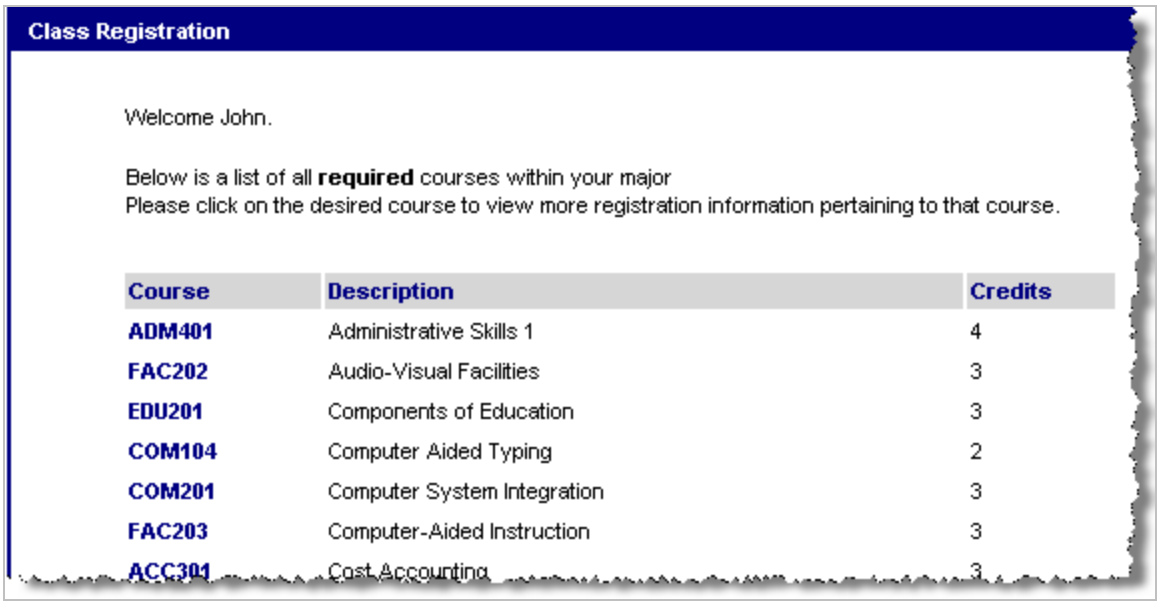
Date	Check/Ref	Code	Description	Charges	Payments	Balance
12/7/1998	Cash	REG	Registration Fee	100.00		$100.00
12/7/1998	1 Hamilton		Registration Fee		100.00	$0.00
12/11/1998	981211-005		On Account		100.00	($100.00)
1/14/1999		TUIT	Tuition	25,000.00		$24,900.00
2/25/1999		SUP	Supplies	25.00		$24,925.00
2/25/1999	525		Check from dad		1,000.00	$23,925.00
2/26/1999	AUTO-022699	TUIT	Course: Accounting 1	600.00		$24,525.00
2/26/1999	AUTO-022699	REG	Reg Fee: Accounting 1	100.00		$24,625.00
2/26/1999		REG	Registration Fee	100.00		$24,725.00
3/24/1999	Auto:990324	TUIT	Course: Art and Graphics in Educati	600.00		$25,325.00
3/24/1999	Auto:990324	REG	Reg Fee: Art and Graphics in Educat	100.00		$25,425.00
5/11/1999	Check	TUIT	From student		10,425.00	$15,000.00

Class Registration

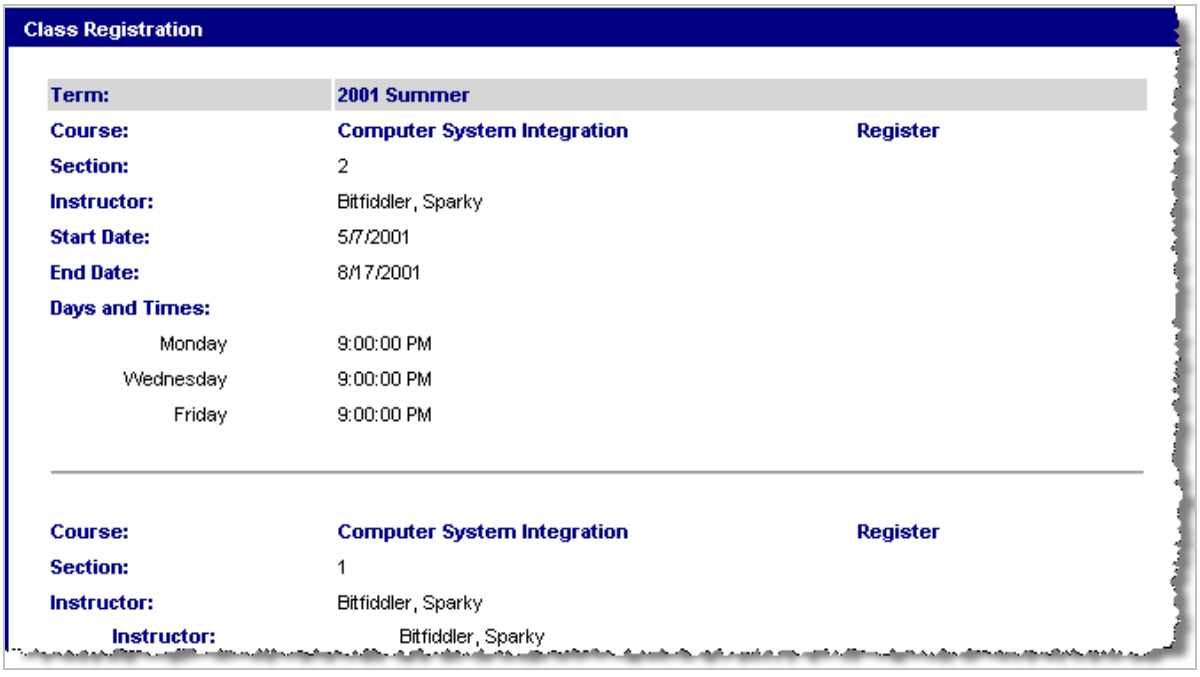
Class Registration is available only during periods of time controlled in CampusNexus Student under the Term Code Setup function. If a student attempts to register for a class in a term that is not open for registration, a message indicates that the term is not available at this time.

When the student displays the Class Registration page, a form similar to the one below is displayed.

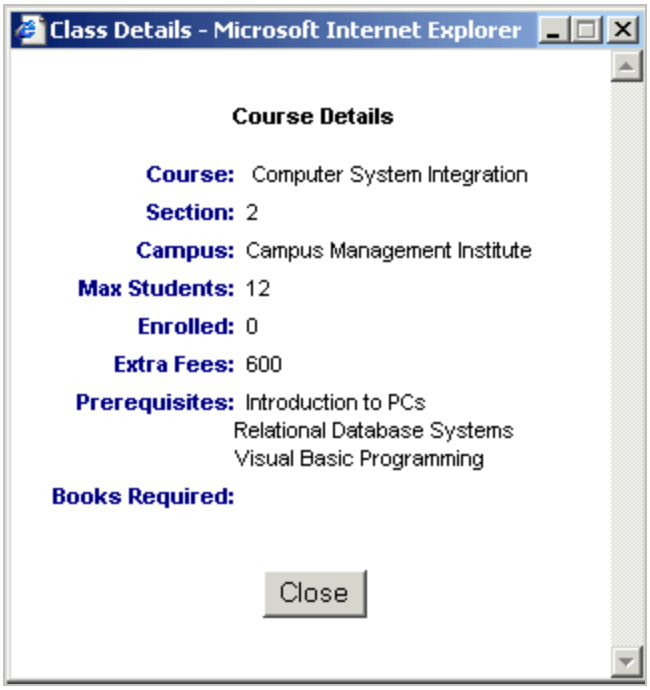
List of Student's Required Courses



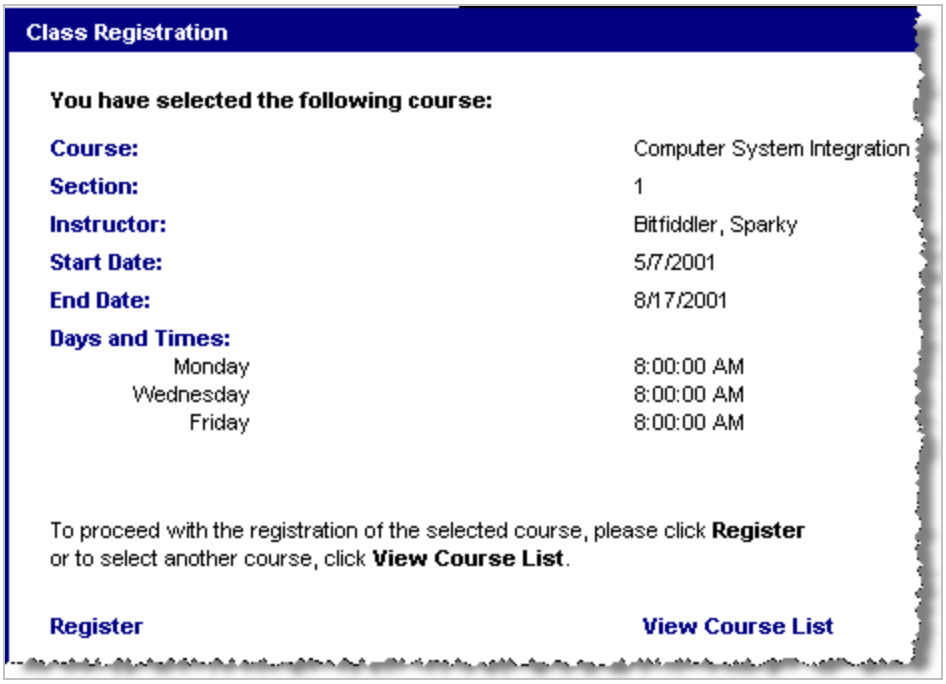
When a course is selected for registration, additional information is displayed.



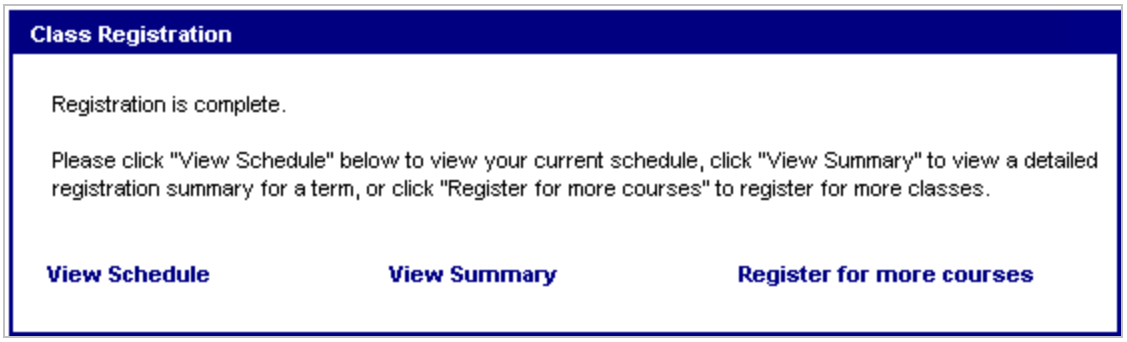
The student can click the Course Name to see more details about the course. The Class Details are displayed in a separate window.



When the student clicks Register on the Class Registration page, the program displays the page below.



If the student registers for the class section, the message below is displayed.



The View Schedule and View Summary links display the forms below; the Register for more courses link displays the course list.

View Schedule

Student Schedule

Class Schedule for Johnson, John J

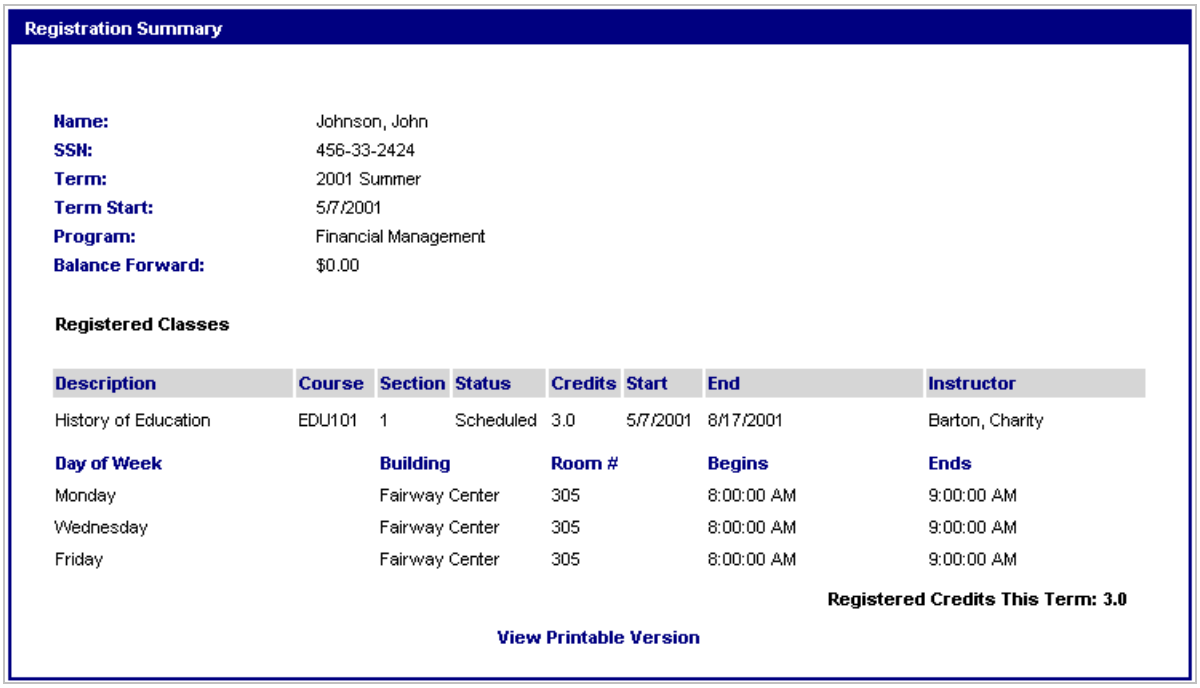
Term	Description	Course	Section	Status	Credits	Start	End	Instructor
2000 Winter	Macro Economics	ECO201	1	Current	4.00	1/3/2000	4/19/2000	Mellon, Andrew

Day of Week	Building / Room #	Begins	Ends
Tuesday	FA / 304	9:00:00 AM	11:00:00 AM
Thursday	FA / 304	9:00:00 AM	11:00:00 AM

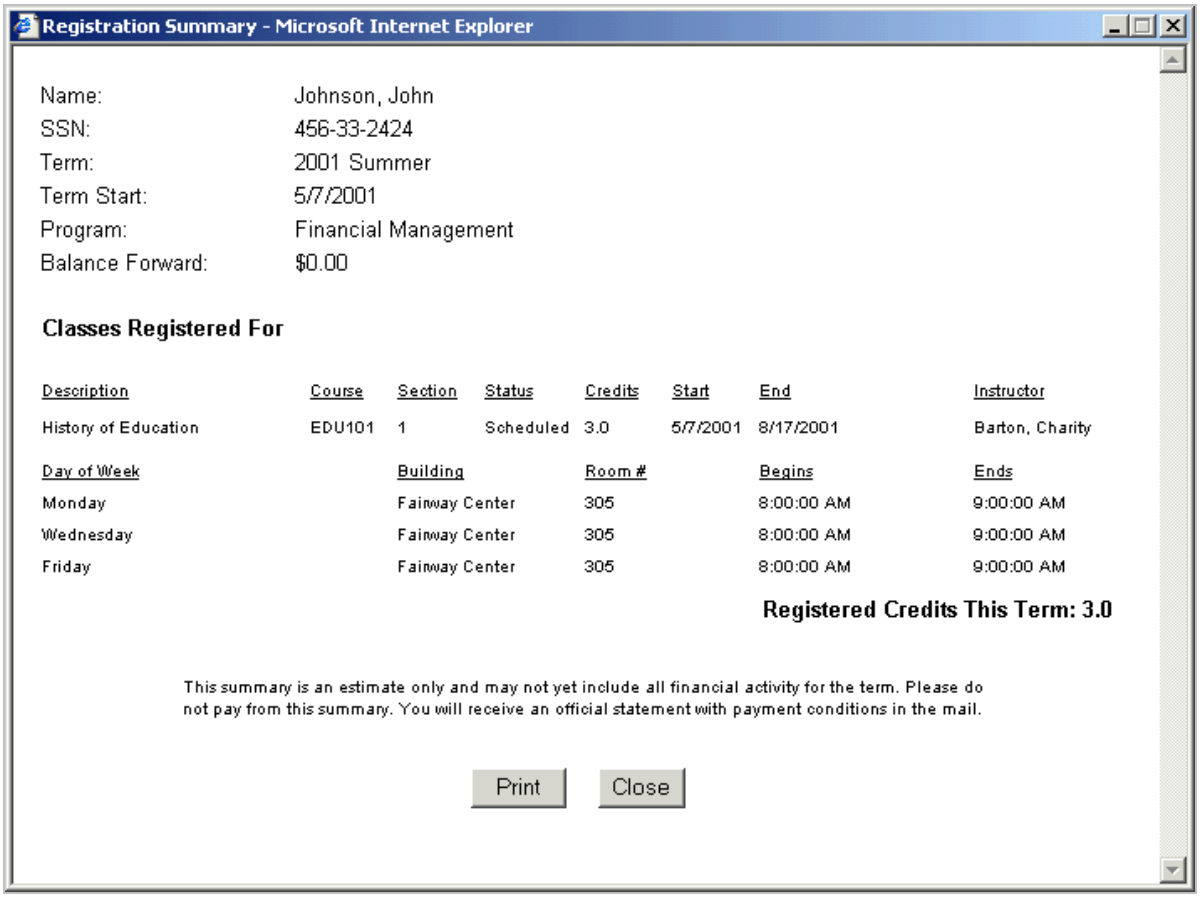
Term	Description	Course	Section	Status	Credits	Start	End	Instructor
2000 Summer	Admissions Procedures	ADM201	1	Scheduled	3.00	5/8/2000	8/18/2000	Bellows, Albert

Day of Week	Building / Room #	Begins	Ends
Wednesday	/	9:00:00 AM	10:00:00 AM
Monday	/	9:00:00 AM	10:00:00 AM

View Summary



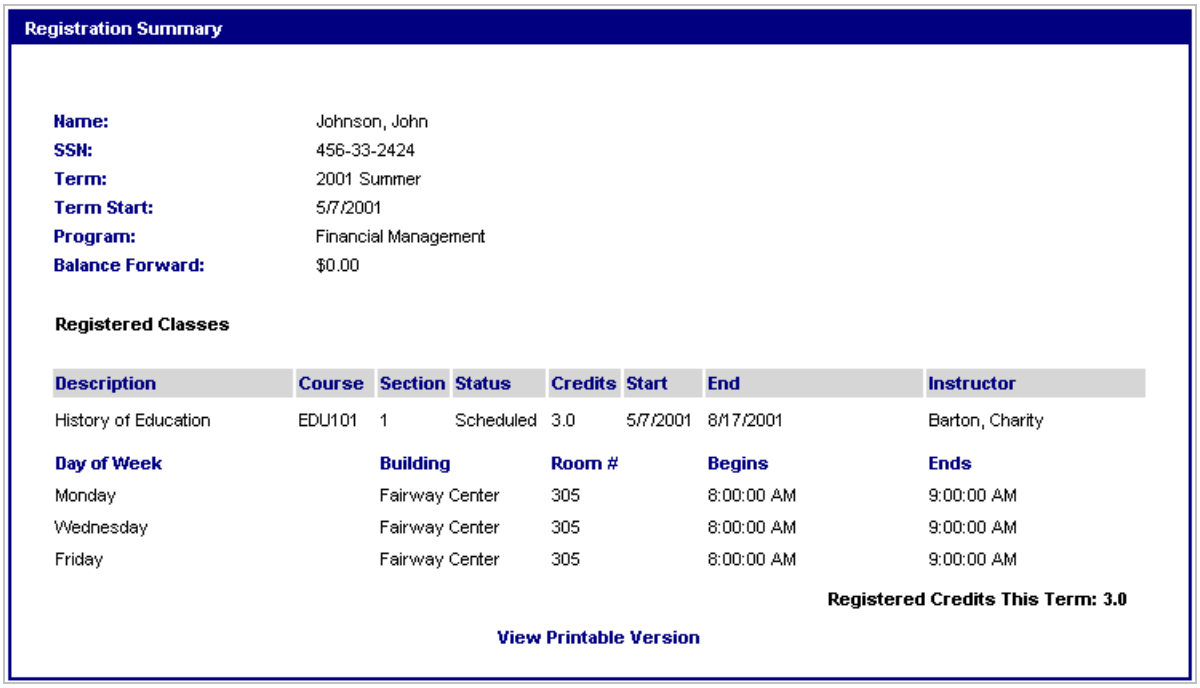
The printable version is displayed in a separate browser window.



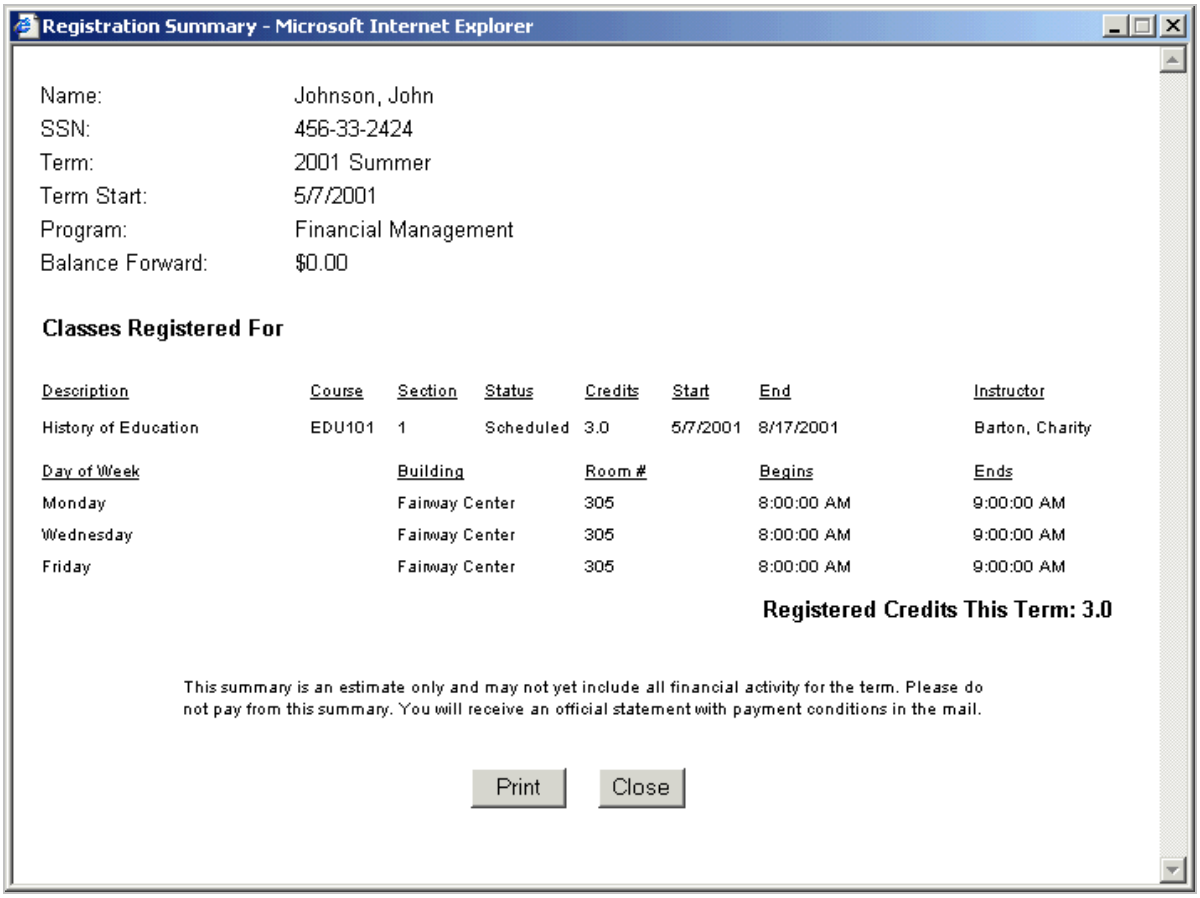
Registration Summary

In this option, the student first selects a term then clicks View Details.

The program then displays the Registration Summary in a read-only format.

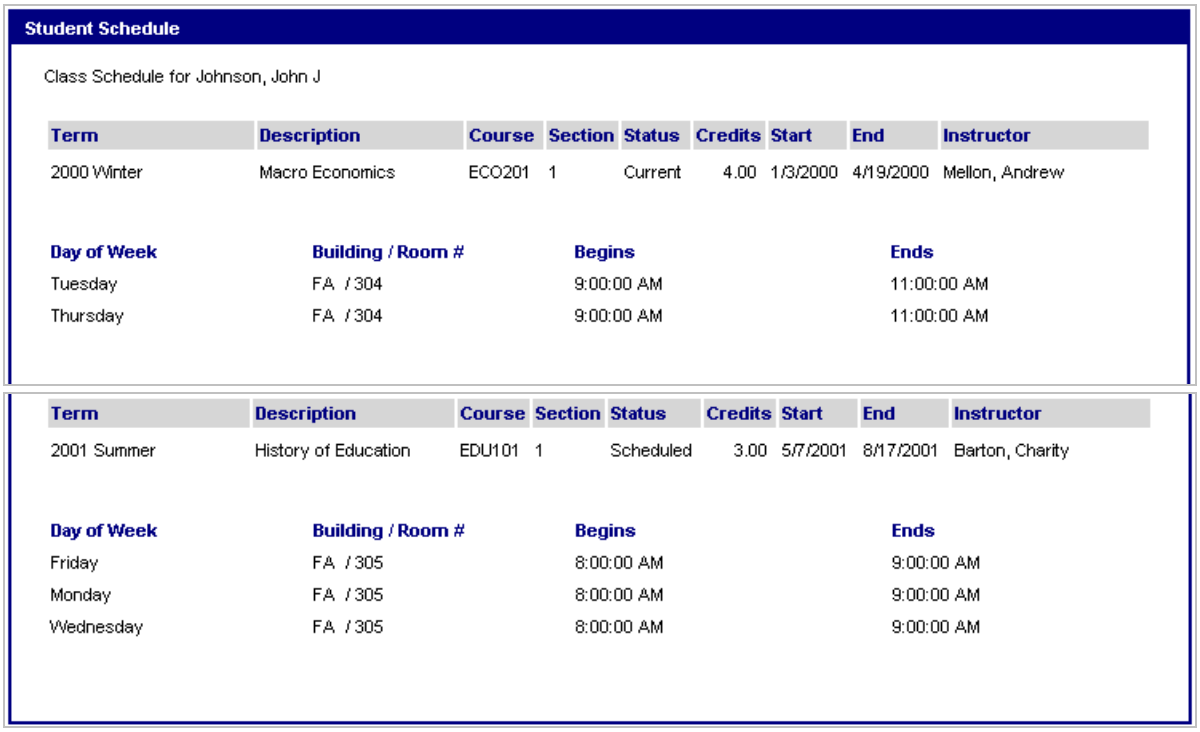


The printable version is displayed in a separate browser window.


Registration Summary - Microsoft Internet Explorer
Name: Johnson, John
SSN: 456-33-2424
Term: 2001 Summer
Term Start: 5/7/2001
Program: Financial Management
Balance Forward: $0.00
Classes Registered For
Description Course Section Status Credits Start End Instructor
History of Education EDU101 1 Scheduled 3.0 5/7/2001 8/17/2001 Barton, Charity
Day of Week Building Room # Begins Ends
Monday Fairway Center 305 8:00:00 AM 9:00:00 AM
Wednesday Fairway Center 305 8:00:00 AM 9:00:00 AM
Friday Fairway Center 305 8:00:00 AM 9:00:00 AM
Registered Credits This Term: 3.0
This summary is an estimate only and may not yet include all financial activity for the term. Please do not pay from this summary. You will receive an official statement with payment conditions in the mail.
Print
Close

Class Schedule

This option displays the student's class schedule in read-only format. All of the student's terms and classes are listed.



Student Schedule

Class Schedule for Johnson, John J

Term	Description	Course	Section	Status	Credits	Start	End	Instructor
2000 Winter	Macro Economics	ECO201	1	Current	4.00	1/3/2000	4/19/2000	Mellon, Andrew

Day of Week	Building / Room #	Begins	Ends
Tuesday	FA / 304	9:00:00 AM	11:00:00 AM
Thursday	FA / 304	9:00:00 AM	11:00:00 AM

Term	Description	Course	Section	Status	Credits	Start	End	Instructor
2001 Summer	History of Education	EDU101	1	Scheduled	3.00	5/7/2001	8/17/2001	Barton, Charity

Day of Week	Building / Room #	Begins	Ends
Friday	FA / 305	8:00:00 AM	9:00:00 AM
Monday	FA / 305	8:00:00 AM	9:00:00 AM
Wednesday	FA / 305	8:00:00 AM	9:00:00 AM

Degree Audit

This option displays a read-only Degree Audit Report similar to that produced in CampusNexus Student.

Degree Audit

Johnson, John J

Student Enrollment

Campus	**Campus Management Institute**	Enroll ID	**9812JO0006**
Description	**Bachelor in General Management**		
Status	**Transfer To Other Program**	Advisor	**Able Baker** afwager@campusmgmt.com
Enroll Date	**12/5/1998**		
Start Date	**1/4/1999**		
Credits Req'd	**0.00**	Hours Req'd	**0.00**
Credits Complete	**9.00**	Hours Complete	**120.00**
Credits Taking	**0.00**	Hours Taking	**0.00**
Cum GPA	**3.00**		

Program Categories

CORE - Core Courses (Credits)

Course	Description	Credits	Status / Grade		Term
ACC101	Accounting 1	4.00	COMPLETE	B+	1999 Winter
ACC201	Accounting 2	4.00	CURRENT		2000 Fall
ACC301	Cost Accounting	3.00	FUTURE		
ADM401	Administrative Skills 1	4.00	FUTURE		
ADM402	Administrative Skills 2	4.00			
ADM404	Directed Internship	6.00			
ADM405	Institutional Design Project	6.00			
ART101	Art and Graphics in Education	3.00	FUTURE		
COM101	Introduction to PCs	2.00	COMPLETE	A	1999 Winter
ECO201	Macro Economics	4.00	CURRENT		2000 Winter
ECO301	Micro Economics	3.00	CURRENT		2000 Fall
EDU101	History of Education	3.00	CURRENT		2001 Summer CMI
EDU201	Components of Education	3.00	FUTURE		
ENG101	Business English	3.00	COMPLETE	B	2000 Fall
ENG201	Creative Writing	3.00			
FIN201	Financial Aid Sources	3.00	CURRENT		2000 Summer
MAR101	Marketing and Sales Concepts	3.00			
MAR301	Successful Marketing Techniques	3.00			
MAT101	Mathematics Review	3.00	COMPLETE	D	1999 Winter
PER201	Interpersonal Relationships	3.00			
PER302	Personnel Management	3.00	FUTURE		
PLA301	Placement Resources	2.00			

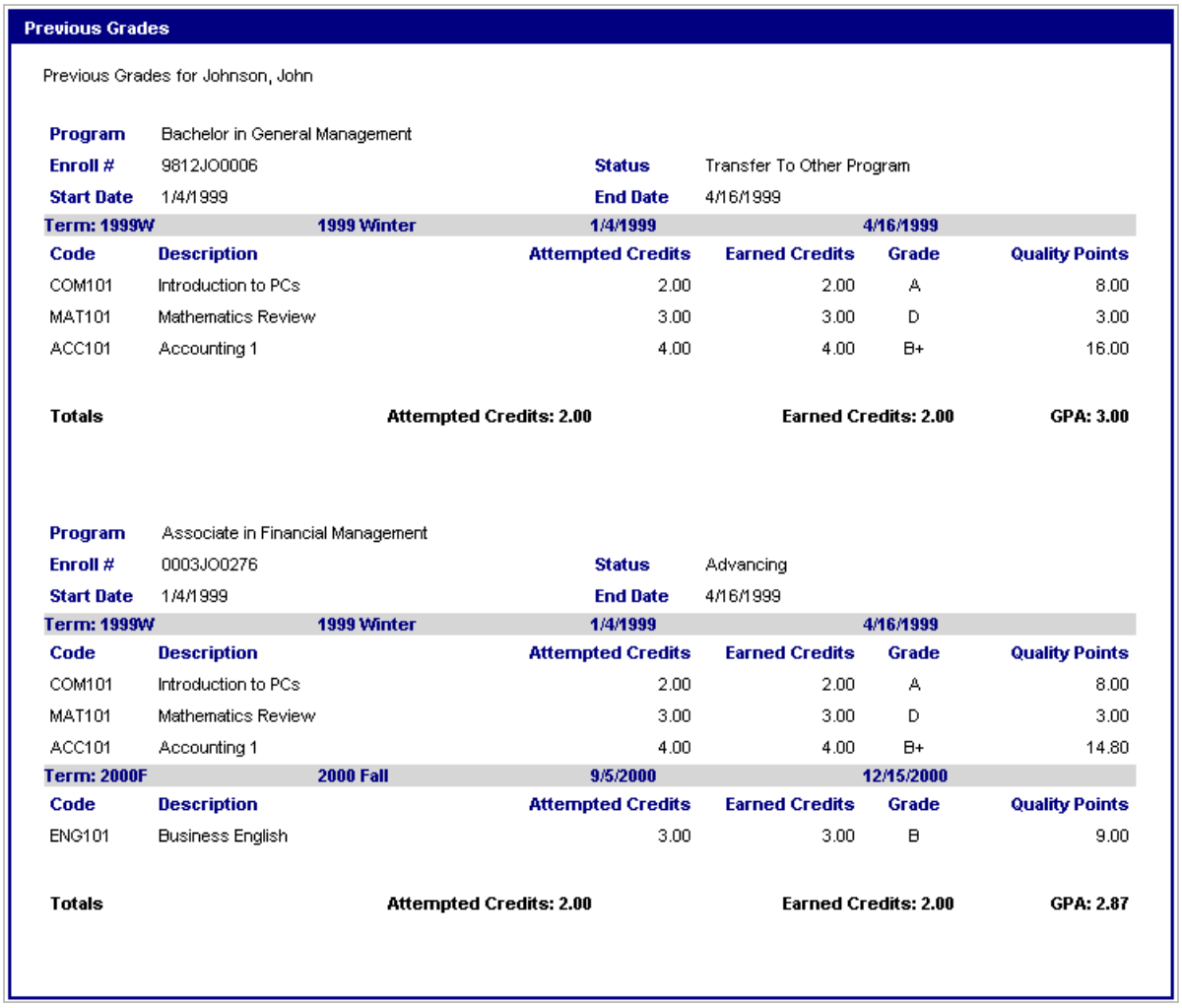
ELECT1 - Elective Pool #1 Courses (Credits)

Course	Description	Credits	Status / Grade	Term
ACC302	Financial Analysis	3.00	FUTURE	
ADM403	Investor Relations	2.00	FUTURE	
ADM406	The Institutional Image	4.00	FUTURE	
COM102	Relational Database Systems	3.00	FUTURE	1999 Winter
COM103	Visual Basic Programming	3.00	FUTURE	
COM104	Computer Aided Typing	2.00	SCHEDULED	
COM105	Spreadsheets	2.00	CURRENT	2000 Fall
COM106	Word Processing	2.00	FUTURE	
COM201	Computer System Integration	3.00	SCHEDULED	
COM202	The Internet in Education	3.00	FUTURE	
COM203	Interactive Computer Systems	3.00	FUTURE	

(Legacy Interface)

Previous Grades

This option displays the student's grade history in read-only format. The grades are sorted by term within programs.



Previous Grades

Previous Grades for Johnson, John

Program	Bachelor in General Management		
Enroll #	9812JO0006	**Status**	Transfer To Other Program
Start Date	1/4/1999	**End Date**	4/16/1999

Term: 1999W	**1999 Winter**	**1/4/1999**			**4/16/1999**
Code	**Description**	**Attempted Credits**	**Earned Credits**	**Grade**	**Quality Points**
COM101	Introduction to PCs	2.00	2.00	A	8.00
MAT101	Mathematics Review	3.00	3.00	D	3.00
ACC101	Accounting 1	4.00	4.00	B+	16.00

Totals **Attempted Credits: 2.00** **Earned Credits: 2.00** **GPA: 3.00**

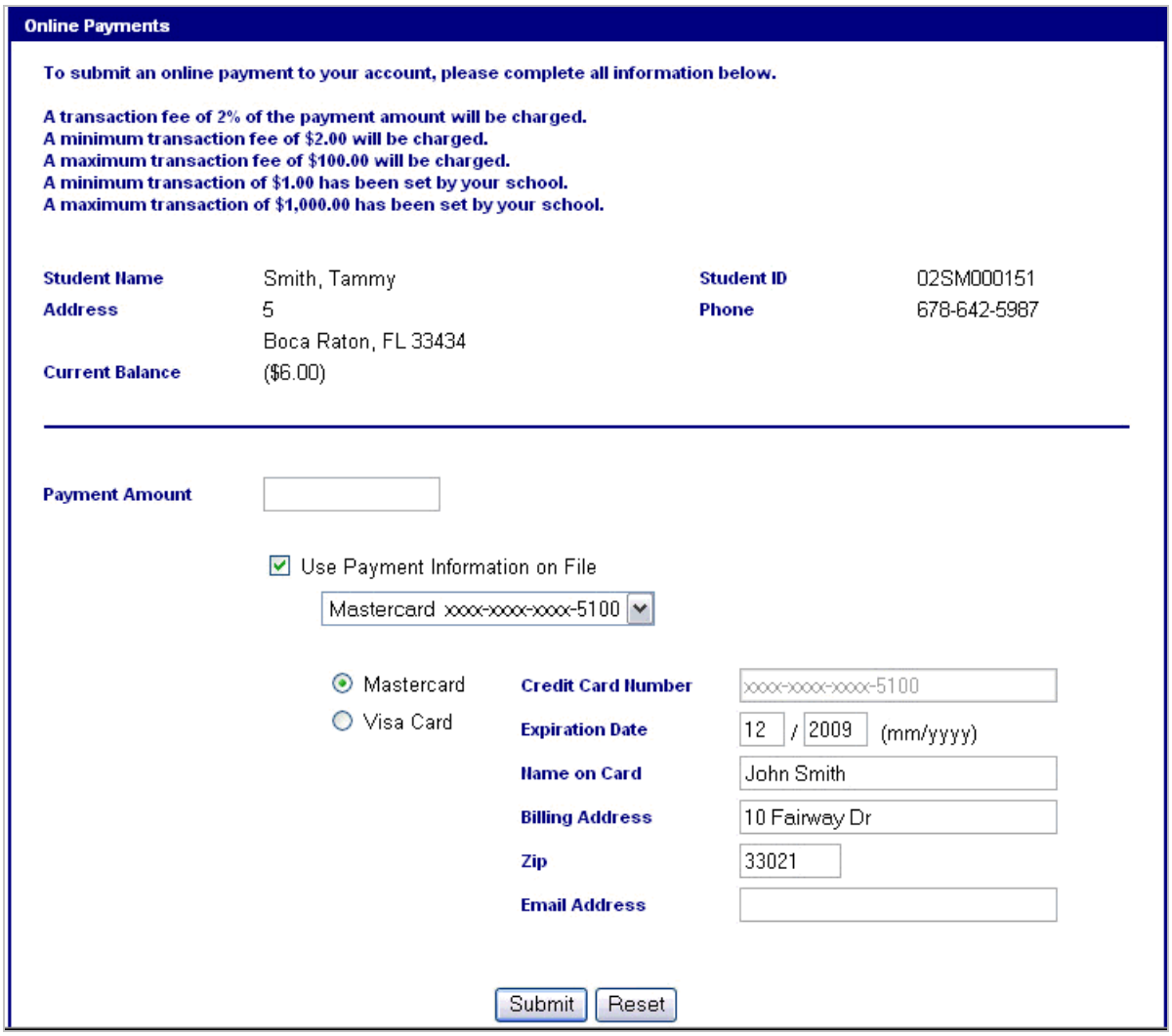
Program	Associate in Financial Management		
Enroll #	0003JO0276	**Status**	Advancing
Start Date	1/4/1999	**End Date**	4/16/1999

Term: 1999W	**1999 Winter**	**1/4/1999**			**4/16/1999**
Code	**Description**	**Attempted Credits**	**Earned Credits**	**Grade**	**Quality Points**
COM101	Introduction to PCs	2.00	2.00	A	8.00
MAT101	Mathematics Review	3.00	3.00	D	3.00
ACC101	Accounting 1	4.00	4.00	B+	14.80
Term: 2000F	**2000 Fall**	**9/5/2000**			**12/15/2000**
Code	**Description**	**Attempted Credits**	**Earned Credits**	**Grade**	**Quality Points**
ENG101	Business English	3.00	3.00	B	9.00

Totals **Attempted Credits: 2.00** **Earned Credits: 2.00** **GPA: 2.87**

Online Payment

Students can post payments to their account online. The form can display the transaction fees and the payment guidelines that have been set up.



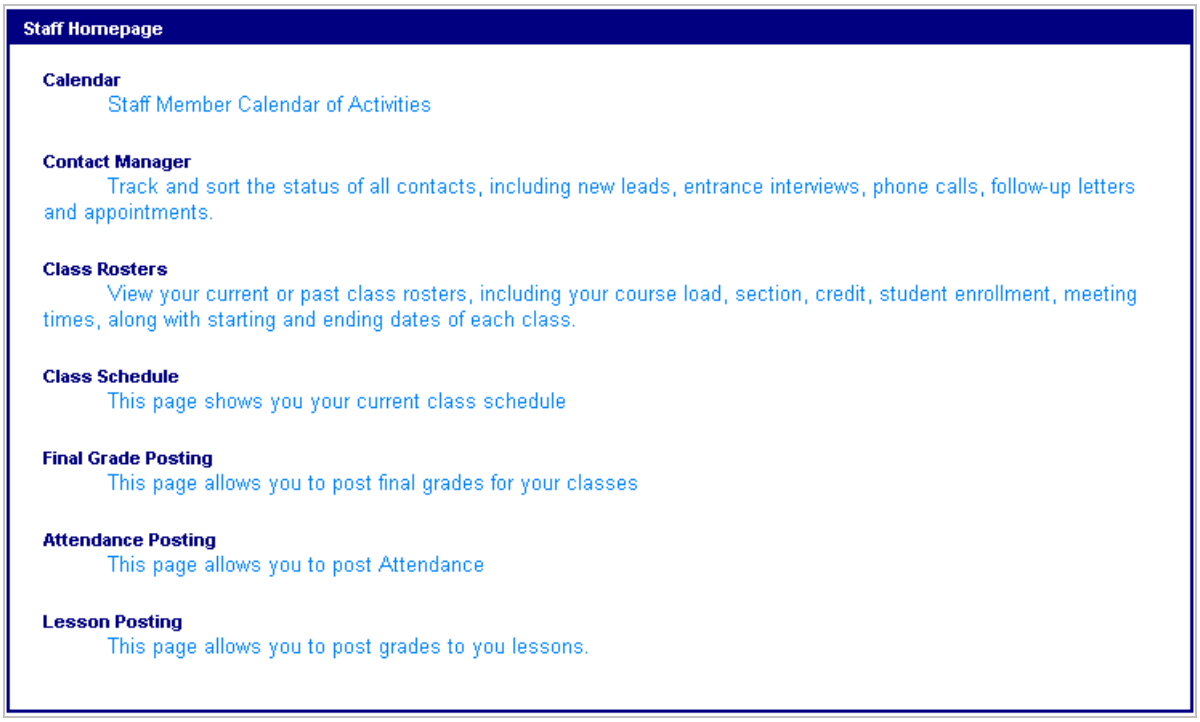
Staff Home Page

The Staff Login option on the home page leads to a login form for staff members. Once a staff member has entered a user name (ID) and password (the same credentials used to access CampusNexus Student), the Staff home page is displayed. Your institution controls the options that appear on the Staff home page via Web Interface - Staff Access Tab in CampusNexus Student.

Staff services include several features commonly used by staff members when they are working directly in CampusNexus Student. Staff services include:

- Calendar
- Contact Manager
- Class Schedules
- Class Rosters
- Attendance Posting
- Final Grade Posting
- Student Information

An alternative method of selecting staff services is from the drop-down menu on the Staff main menu bar.

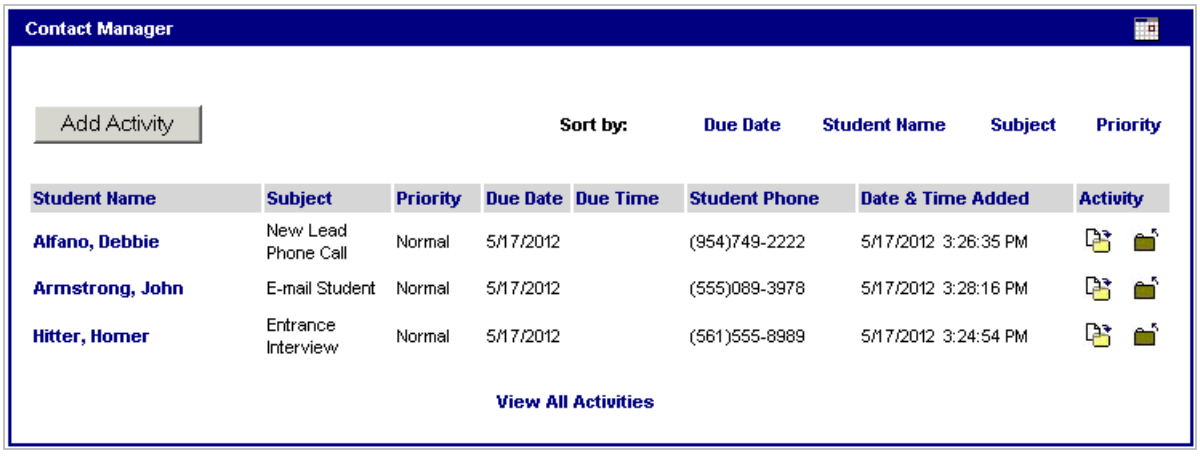


Calendar

The Calendar page displays a monthly calendar on which days with activities are shaded.

The activities on this page are the same activities that CampusNexus Student displays when you are working in Contact Manager. After selecting a date on the calendar, you can display, edit, and close the activities for that date.

If you click on a shaded date, a list of activities for that day is displayed. The page below shows all outstanding activities for a selected day.



Click a student's name to display the Student Information in a separate browser window.

Click the **Calendar** icon in the title bar of the Activity List to see the monthly calendar showing all days on which you have activities scheduled.

Click **Add Activity** to add a new activity. Refer to Add Activity.

Click one of the **Sort by:** options to rearrange the activity list. You can sort by Due Date (default), Student Name, Subject, or Priority.

Click **View All Activities** to expand the list to include all outstanding activities regardless of date.

Edit Activity

On an activity row, click to edit the selected activity. The Edit Activity page is displayed in a separate browser window. Refer to Edit Activity.

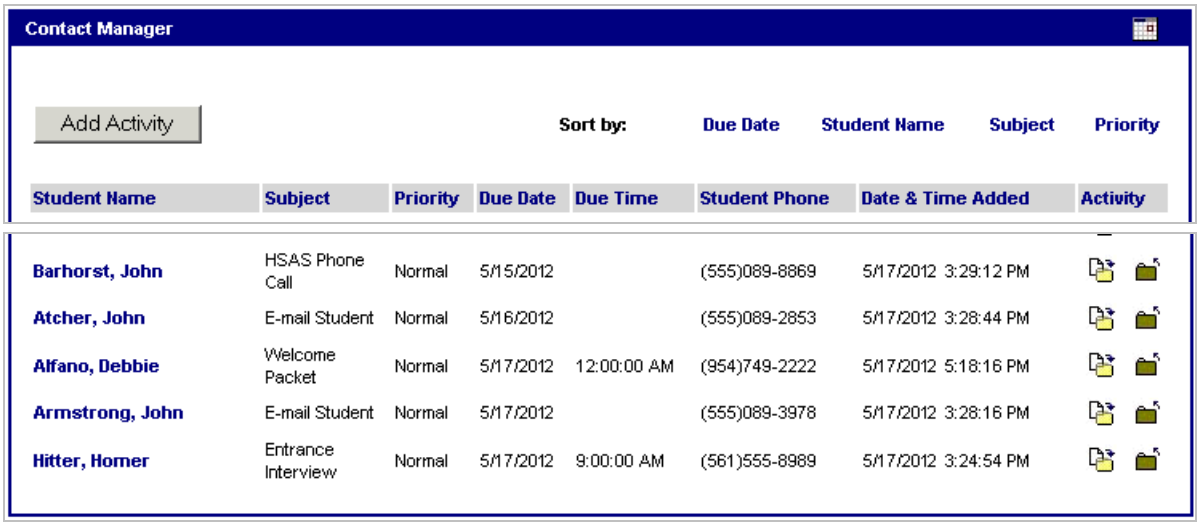
Close Activity

On an activity row, click to close the selected activity. The Close Activity page is displayed in a separate browser window. Refer to Close Activity.

Contact Manager

You can view your Contact Manager activity list from the Contact Manager web page. This feature has much of the functionality of the corresponding feature in CampusNexus Student. It uses the same security settings.

From this web page, you can add an activity, edit an activity, or close an activity.



Click in the title bar of the Activity List to see a monthly calendar showing all days on which you have activities scheduled. For more information, see Staff Calendar.

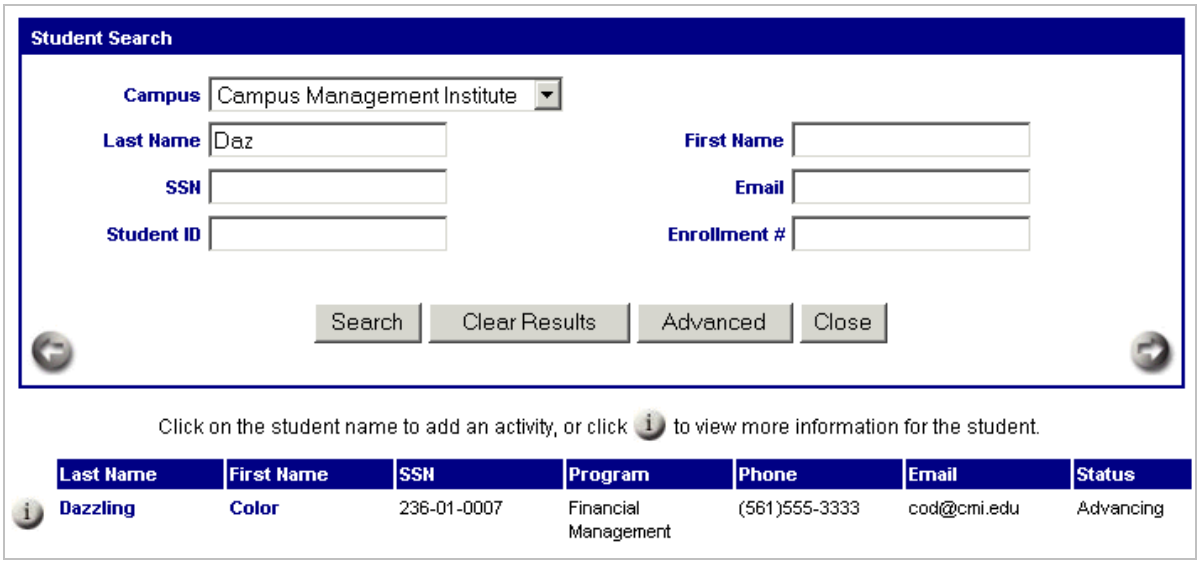
Click one of the **Sort by:** options to rearrange the activity list. You can sort by Due Date (default), Student Name, Subject, or Priority.

Click the **student's name** to display the Student Information page in a separate browser window.

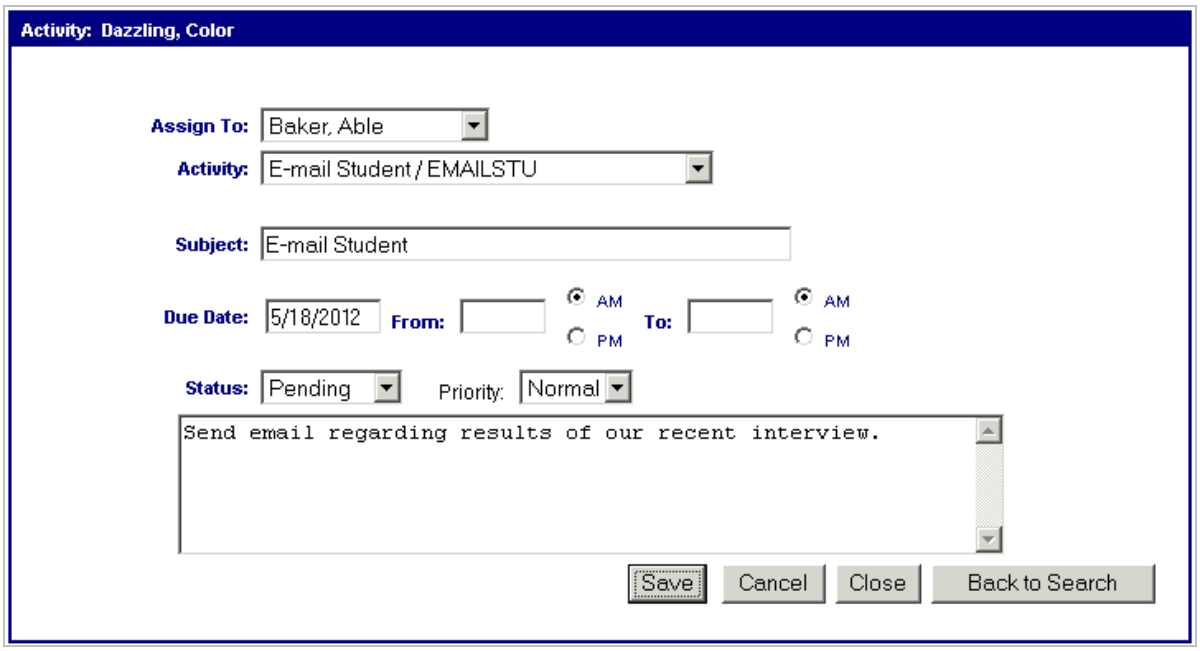
Add Activity

Click **Add Activity** to add a new activity. The Student Search page is displayed. Enter enough data to find the student for whom you want to add an activity.

Click **Search** to display a list of students meeting your search criteria.



Click the Name of the student for whom you want enter a new activity. The Add Activity page is displayed.



Enter the necessary data for the activity.

Click **Save**.

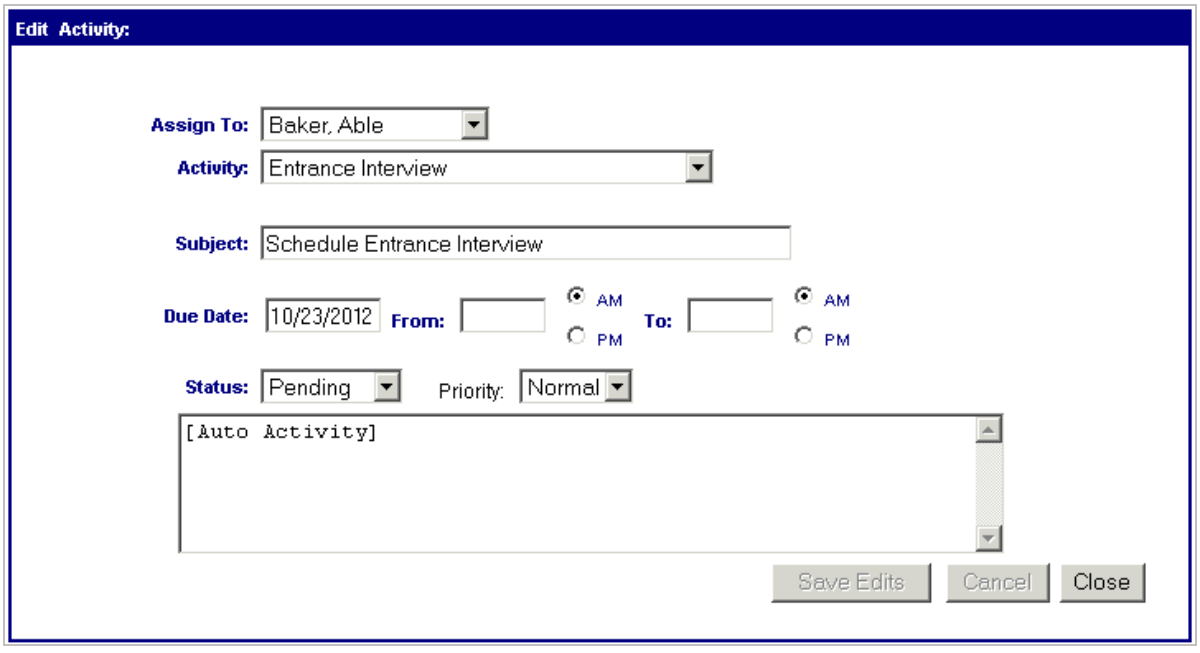
Click **Back to Search** to return to the Student Search page.

Click **Cancel** to cancel the addition of the new activity.

Click **Close** to close the form.

Edit Activity

On an activity row, click to edit the selected activity. The Edit Activity page is displayed in a separate browser window.



You can change any activity data that you could change if you were working in CampusNexus Student.

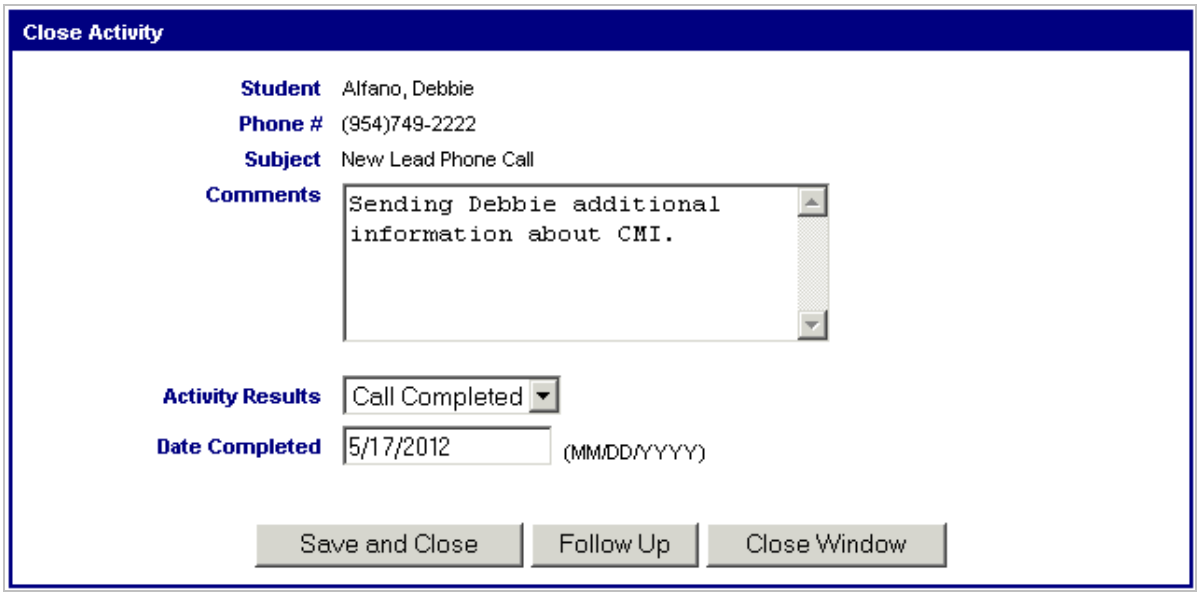
Click **Save Edits** to save any changes you make to the activity. The browser window is closed during the save process.

Click **Cancel** to cancel any changes.

Click **Close** to close the Edit Activity browser window without saving changes.

Close Activity

On an activity row, click to close the selected activity. The Close Activity page is displayed in a separate browser window.



Enter any **Comments** about the activity.

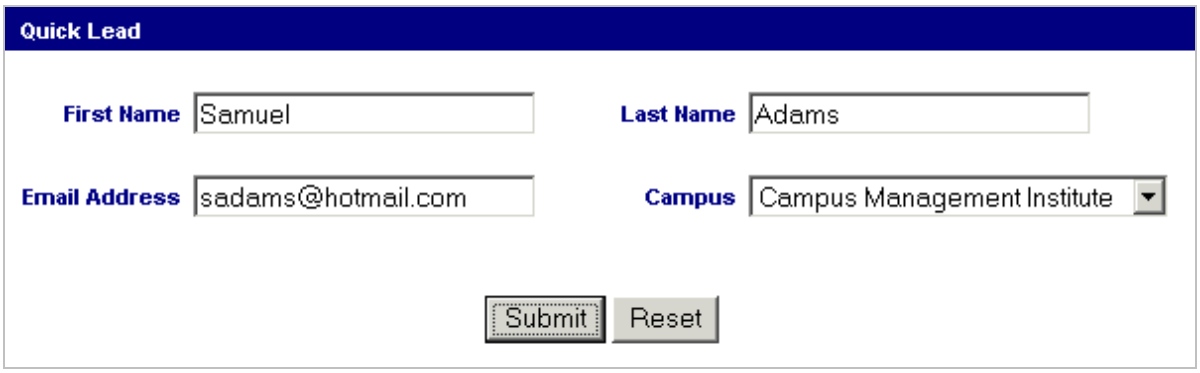
Select an option from **Activity Results**.

Accept or enter the **Date Completed**.

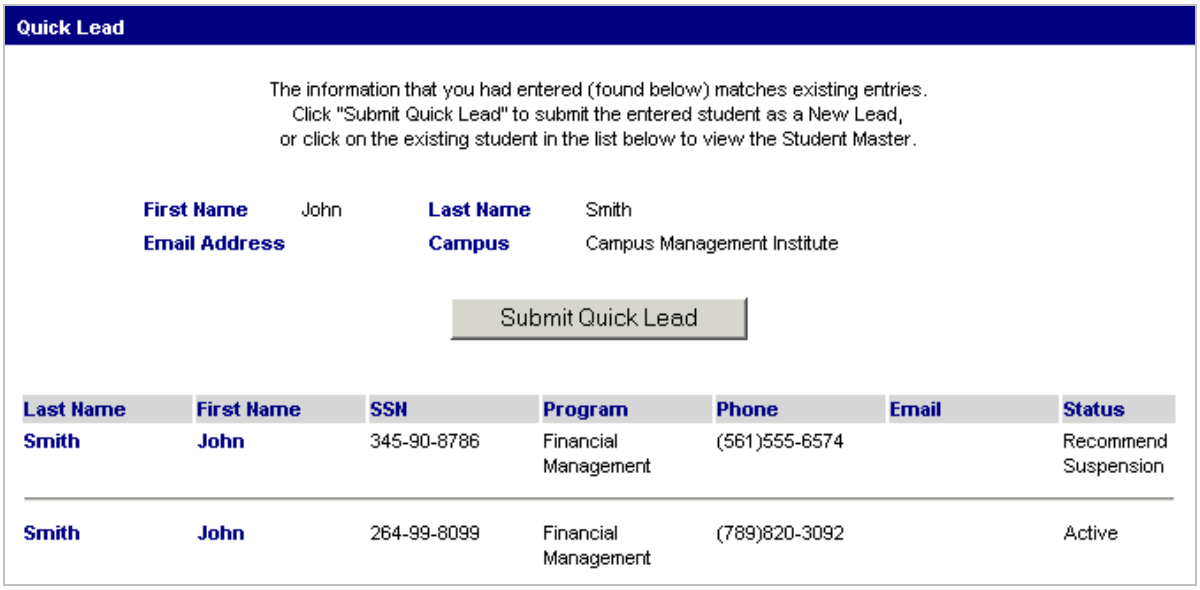
Click **Save and Close** or **Follow Up** as required. If you click Follow Up, the Add Activity page is displayed with the student's data filled in. Complete the follow-up activity and save it.

Add New Lead

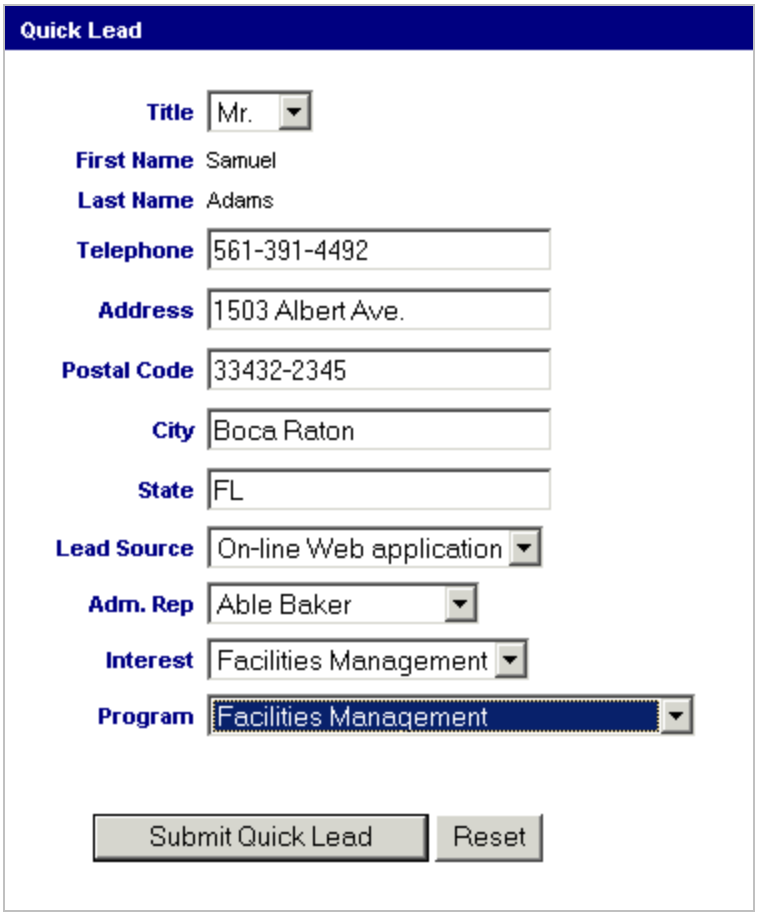
Staff members can submit new leads to CampusNexus Student by entering some basic information. When you click on the Add New Lead menu option, an initial form is displayed.



Enter the lead's name, email address, and the campus in which the lead is interested. Click Submit. CampusNexus Student checks for duplicates in the database. If the new lead data matches one or more students in the student master table, the list of possible duplicates is displayed.



From the list of possible duplicates, you can click on a student name to see more information in a separate browser window. If none of the possible duplicates is displayed to match the new lead, click Submit Quick Lead in the duplicates window. The Quick Lead data entry page is displayed. The data entry boxes on this form correspond to your custom designed Quick Lead form in CampusNexus Student.

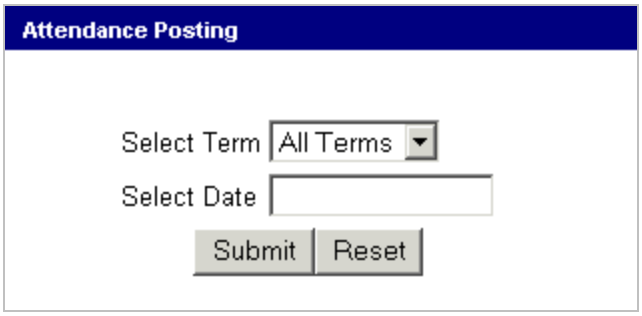


After entering or selecting the required data, click Submit Quick Lead. A confirmation message is displayed.

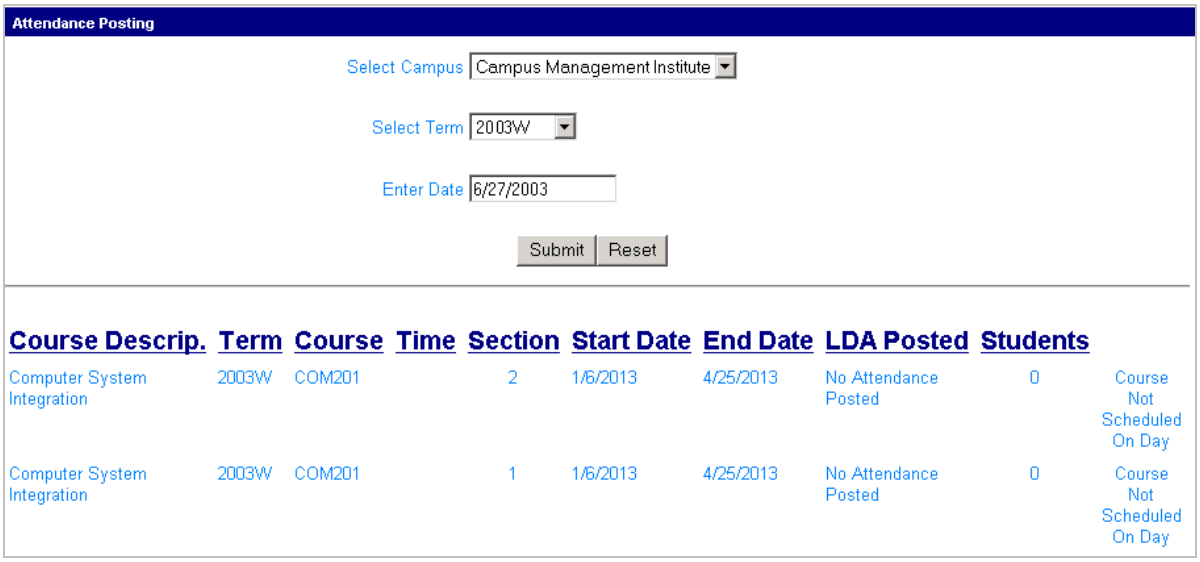
Click Return to Quick Lead Entry to start another new lead or click Staff Home Page.

Staff Attendance Posting

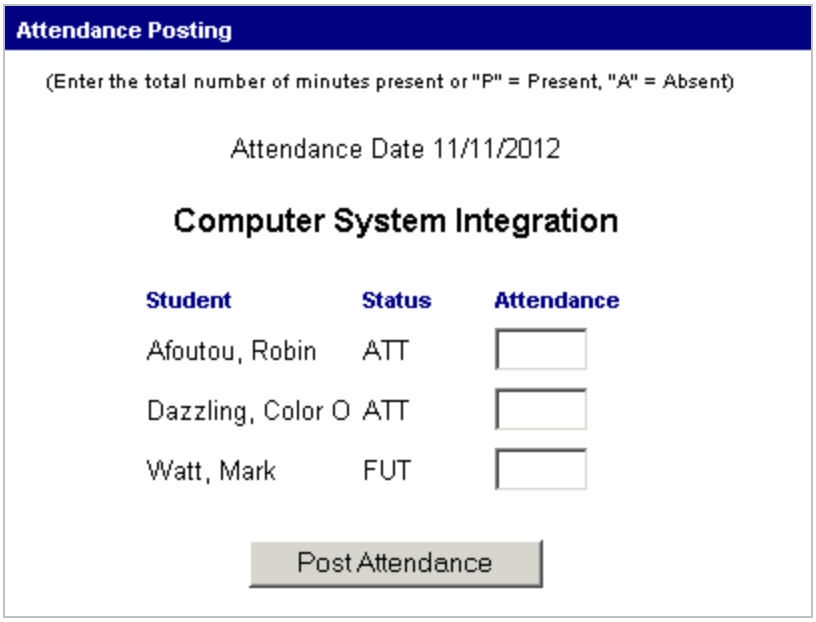
You can view a list of class sections for which to post attendance. The list includes only your courses.



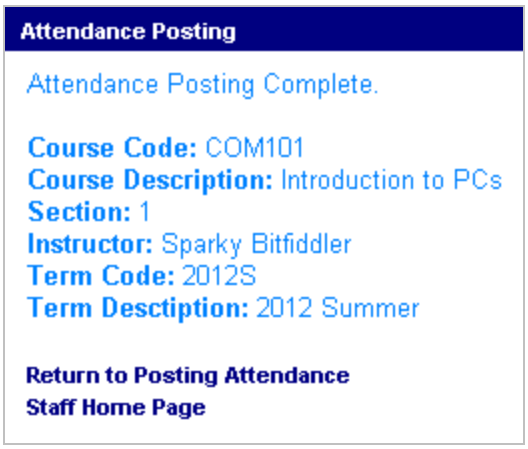
Select Term and select (enter) a date for which to post attendance.



After entering the date, select a course by clicking the Course Description. A class section roster is displayed. Enter the time each student attended. You must make an entry for all students to indicate that they are present (enter the total minutes scheduled for the class section or **P**), tardy (enter less than the total minutes scheduled), or absent (enter zero minutes attended or **A**).



Click Post Attendance. The attendance is posted to the students' records. A confirmation message is displayed when the posting is complete.

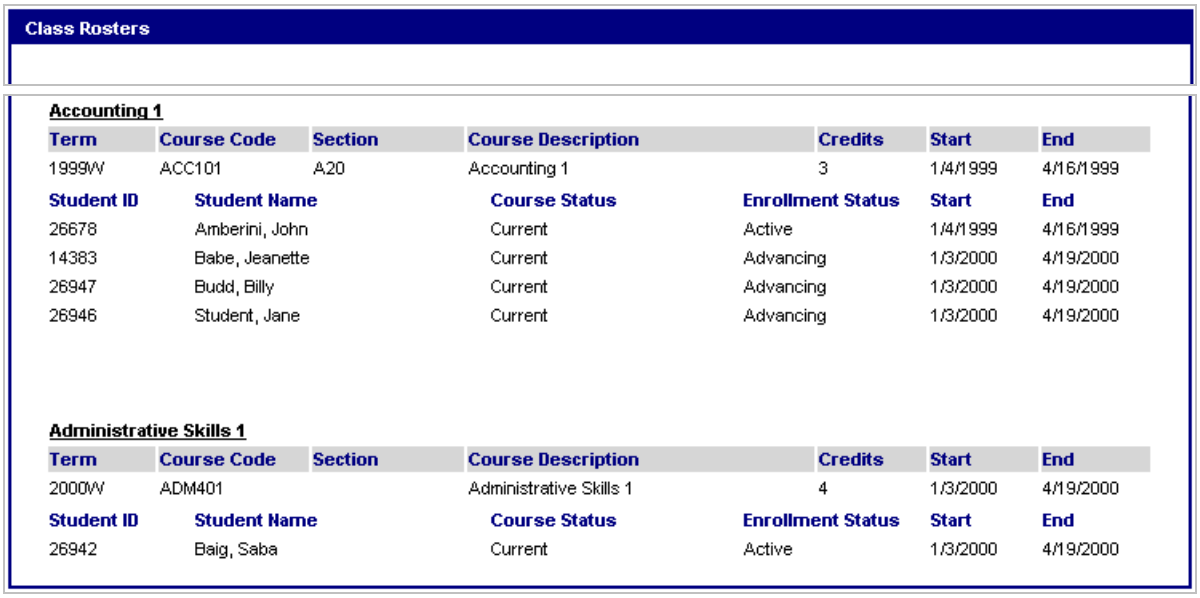


From the confirmation message, Return to Posting Attendance or return to the Staff Home Page.

Class Rosters

You can view your class rosters from this read-only page. It shows rosters for all class sections you are scheduled to teach.

The data for each class section includes the Description, the Course Code, Section Code, Credits, Start Date, and End Date. For each student on the roster, the display shows the Student ID, Student Name, Status in the Course, Enrollment Status, Start Date, and End Date.



Class Rosters

Accounting 1

Term	Course Code	Section	Course Description	Credits	Start	End
1999W	ACC101	A20	Accounting 1	3	1/4/1999	4/16/1999

Student ID	Student Name	Course Status	Enrollment Status	Start	End
26678	Amberini, John	Current	Active	1/4/1999	4/16/1999
14383	Babe, Jeanette	Current	Advancing	1/3/2000	4/19/2000
26947	Budd, Billy	Current	Advancing	1/3/2000	4/19/2000
26946	Student, Jane	Current	Advancing	1/3/2000	4/19/2000

Administrative Skills 1

Term	Course Code	Section	Course Description	Credits	Start	End
2000W	ADM401		Administrative Skills 1	4	1/3/2000	4/19/2000

Student ID	Student Name	Course Status	Enrollment Status	Start	End
26942	Baig, Saba	Current	Active	1/3/2000	4/19/2000

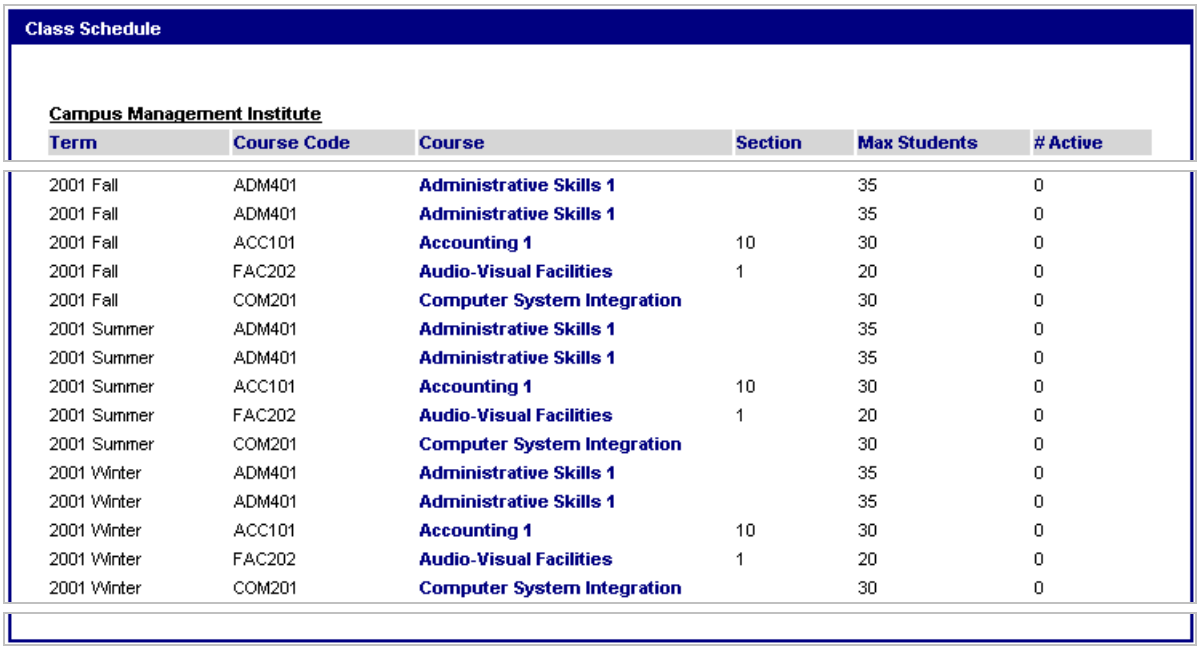
Use the menu options on the main menu bars to navigate to other Staff Services pages from the Class Rosters page.

Class Schedule

You can access a read-only list of your scheduled classes. The class schedule is grouped by campus. For each class, the page displays the Term, Course Code, Description, Section Code, Maximum Students, and Active Students.

When you click a course description, the Class Roster page is displayed. All classes having registered students have a class roster.

Right-click on the Class Roster page and select the Back option to return to the Class Schedule page.



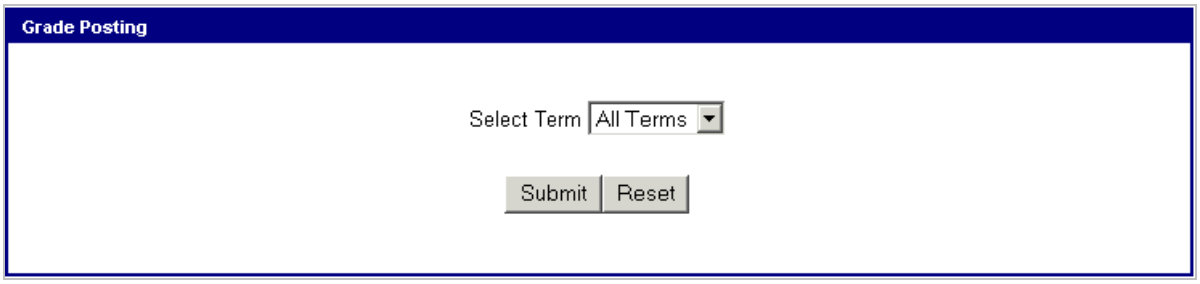
Class Schedule

Campus Management Institute

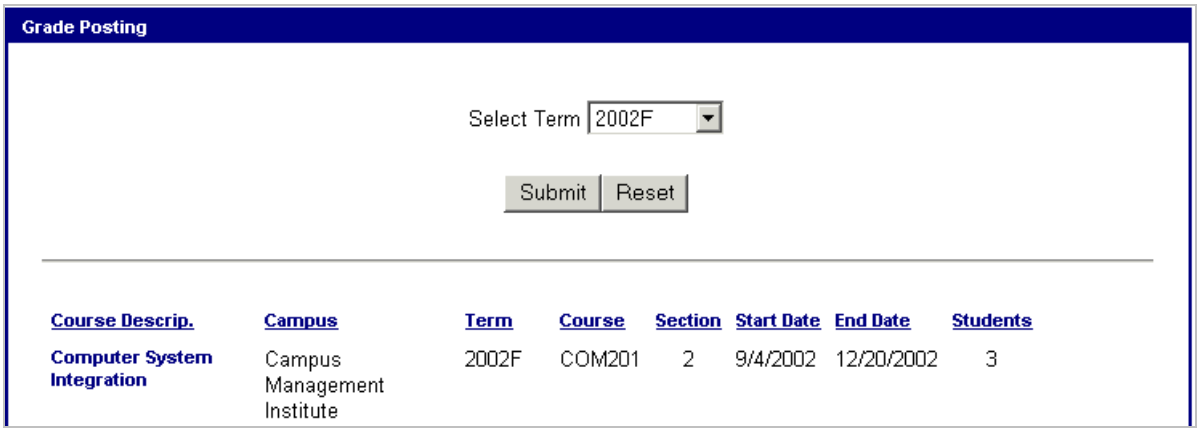
Term	Course Code	Course	Section	Max Students	# Active
2001 Fall	ADM401	Administrative Skills 1		35	0
2001 Fall	ADM401	Administrative Skills 1		35	0
2001 Fall	ACC101	Accounting 1	10	30	0
2001 Fall	FAC202	Audio-Visual Facilities	1	20	0
2001 Fall	COM201	Computer System Integration		30	0
2001 Summer	ADM401	Administrative Skills 1		35	0
2001 Summer	ADM401	Administrative Skills 1		35	0
2001 Summer	ACC101	Accounting 1	10	30	0
2001 Summer	FAC202	Audio-Visual Facilities	1	20	0
2001 Summer	COM201	Computer System Integration		30	0
2001 Winter	ADM401	Administrative Skills 1		35	0
2001 Winter	ADM401	Administrative Skills 1		35	0
2001 Winter	ACC101	Accounting 1	10	30	0
2001 Winter	FAC202	Audio-Visual Facilities	1	20	0
2001 Winter	COM201	Computer System Integration		30	0

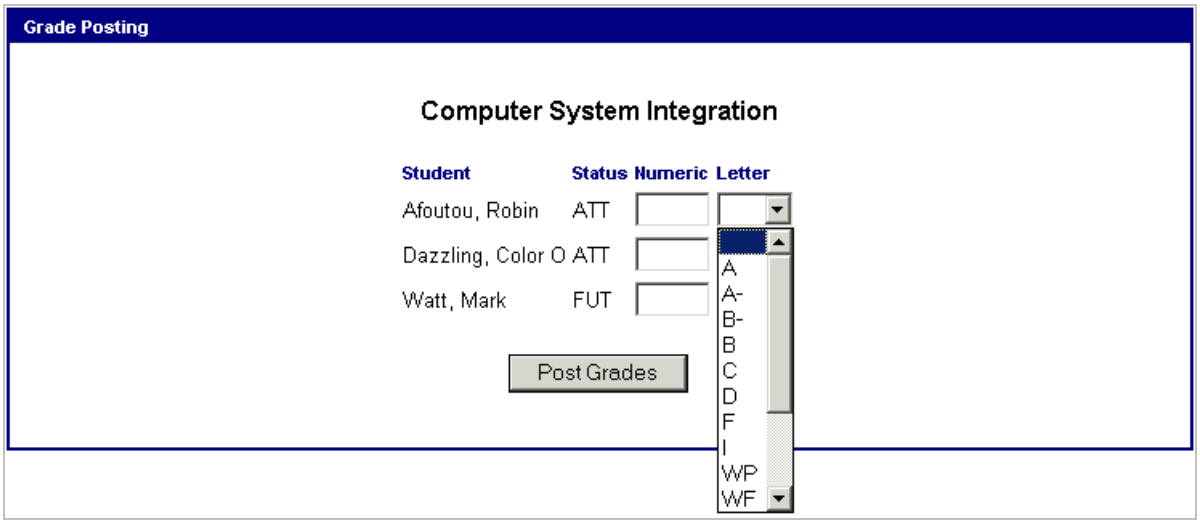
Final Grade Posting

You can select a course for which to post final grades. The Grade Posting page lists all courses that you are scheduled to teach.



Select the Term and click the Course Description to select a course. The class section roster is displayed for grade entry.





Enter Numeric grades if your institution uses them for determining the student's final grade. Numeric grades are converted to letter grades according to the grading scale used for the course.

Click to open the letter grade list.

Click Post Grades to post the final grades for the class section. The grades are posted to the CampusNexus Student database. A confirmation message is displayed after the posting process.

Right-click on the Grade Posting Roster page and select Back to return to the course list page.

Student Information

You can display the Student Information web page from most of the Staff Services web pages. Typically, wherever you see a list of students, you will see the Student Information icon next to the students' names. Click the icon to view a student information page. From this page, you can view a history of Contact Manager activities or a list of student-related documents. You can also add a new activity.

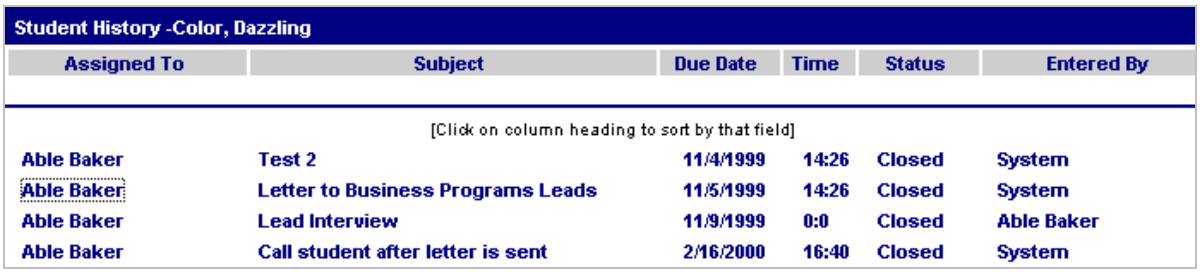
Click Back to return to the web page from which you came.

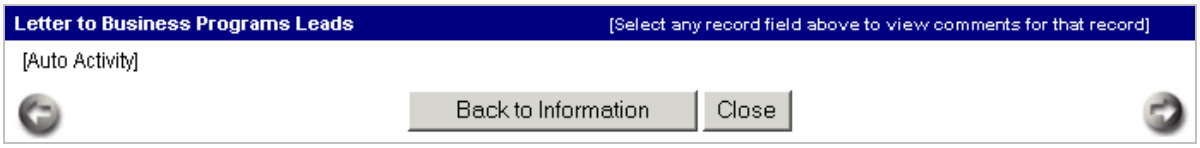
Click Add Activity to add an activity for this student in Contact Manager.

Click Close to close the Student Information page.

Student History

Click to see a history of Contact Manager activities for the student.





Click on a column heading to sort the activities list by the selected values.

Click a row in the activities list to see any comments on file for the selected activity. As you click on the rows, the program will tell you if the activity was assigned via an automatic activity.

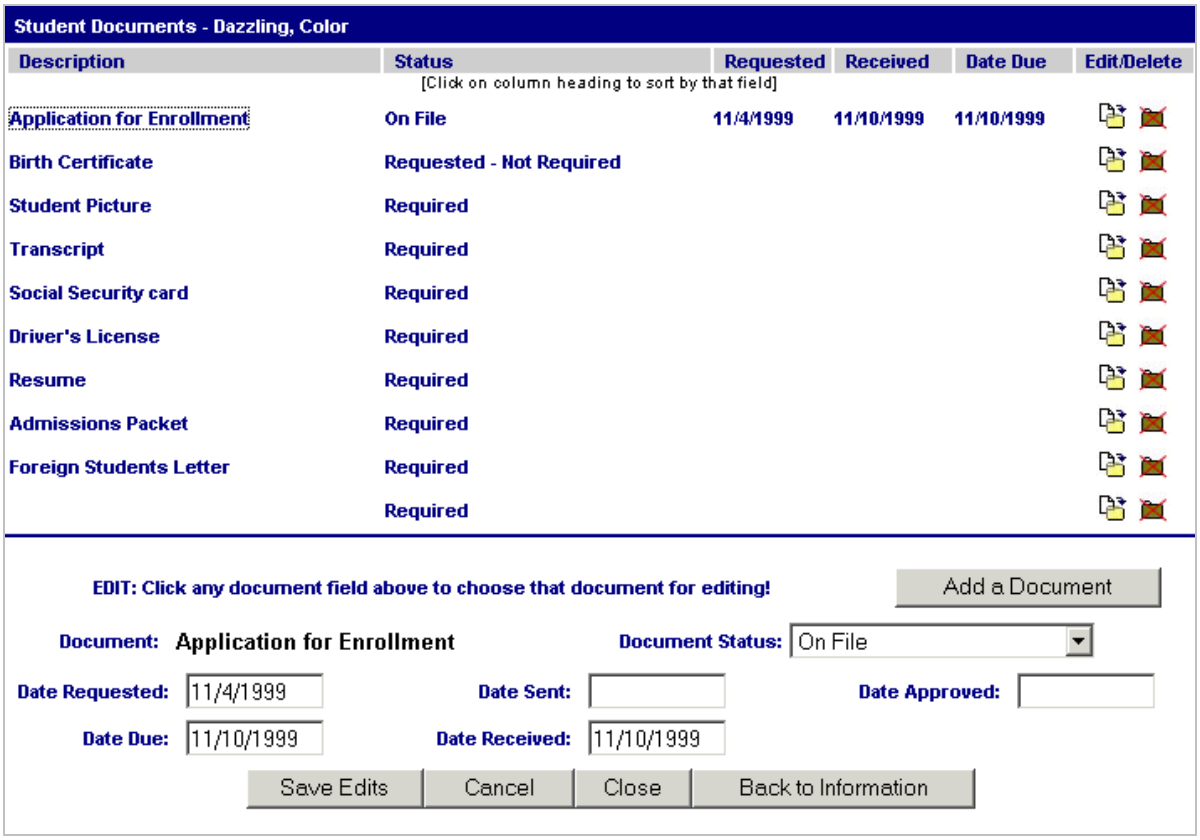
Click to return to the previous page.

Click to go to a more recent page.

Click Back to Information to return to the Student Information page.

Student Documents

Click to see a list of documents related to the selected student. From this page you can see and edit the document tracking data. You can also add a new document to the list.



Click Add a Document to add a new document to the student's list. See the "Add Activity" procedure under "Contact Manager" earlier in this document.

Click on a column heading to sort the activities list by the selected values.

Click a document in the list to choose it for editing. The program will display the document tracking data in the fields at the bottom of the form. You can also click the Edit icon to the right of the document to be edited.

Click to delete a document.

Change the Document Status, Date Requested, Date Sent, Date Approved, Date Due, and/or Date Received as required.

Click Save Edits to save any changes you have made.

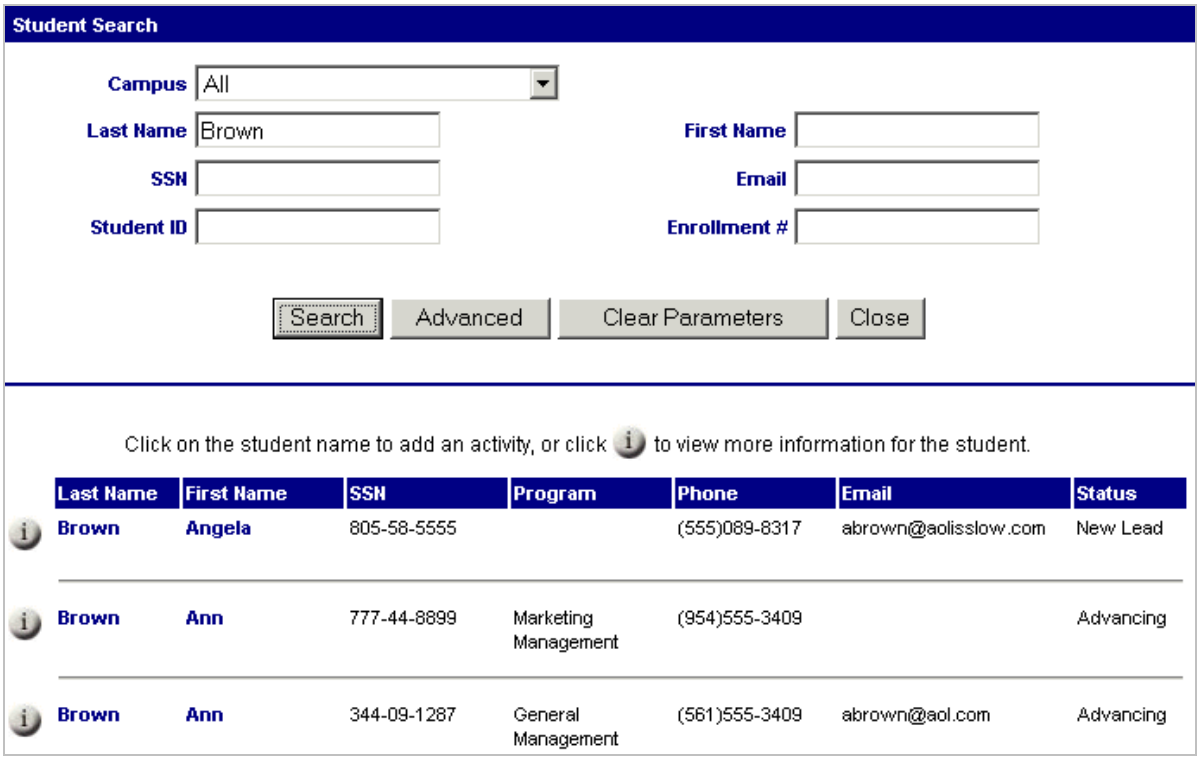
Click Cancel to cancel any data changes you have made.

Click Back to Information to return to the Student Information page.

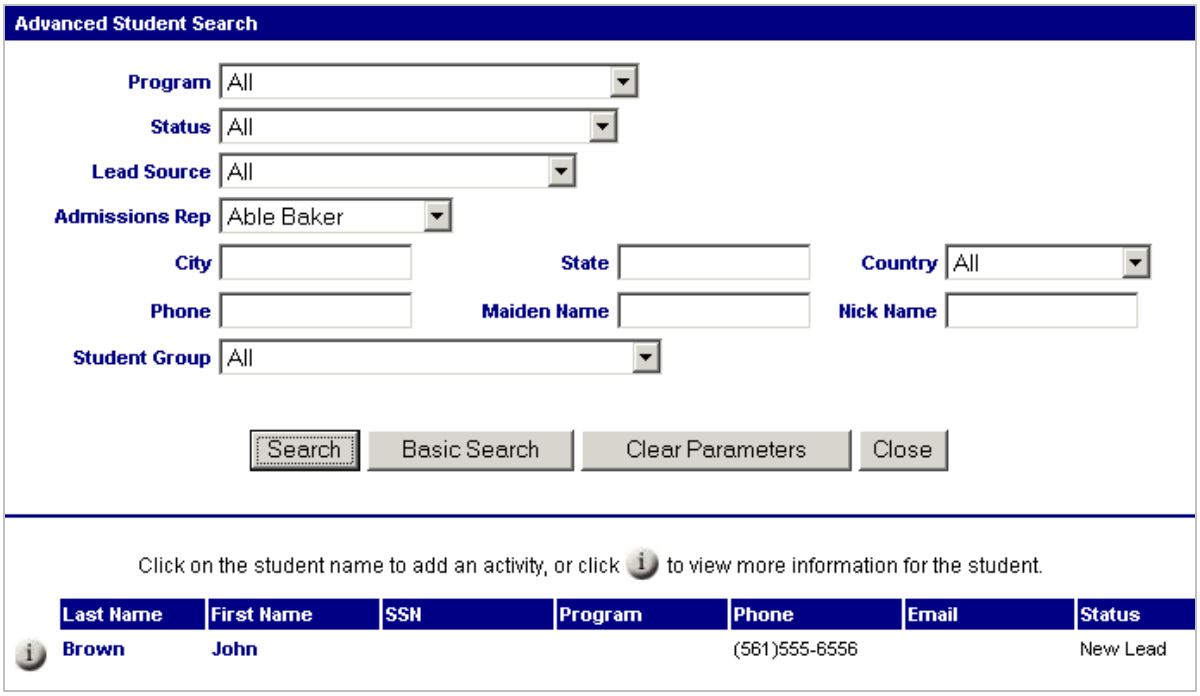
Student Search

The Student Search page offers the same searching features found in CampusNexus Student. The CampusNexus Student security provisions apply here as well.

1. Click **Student Search** from any staff web page. The Student Search page is displayed.



2. Enter the necessary data to find one or more students.
3. If necessary, click **Advanced** to use the advanced search criteria. If you are on the Advanced Student Search page, click **Basic Search** to display the Basic Student Search page. The Basic search parameters and the Advanced search parameters work together as they do in the CampusNexus Student search tool.

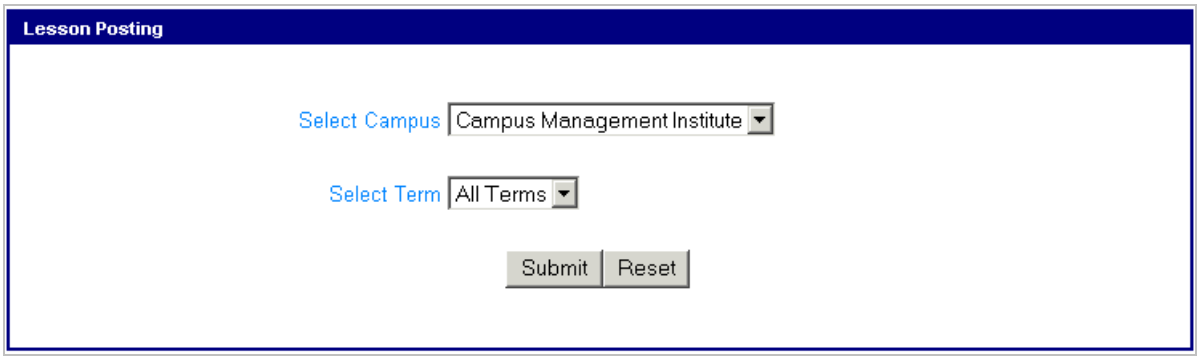


4. Click **Search**. The search tool will find all students in the CampusNexus Student database that match your search criteria.
5. Click beside a student's name to see that student's information page.
6. Click the student's **Name** to add an activity in Contact Manager.

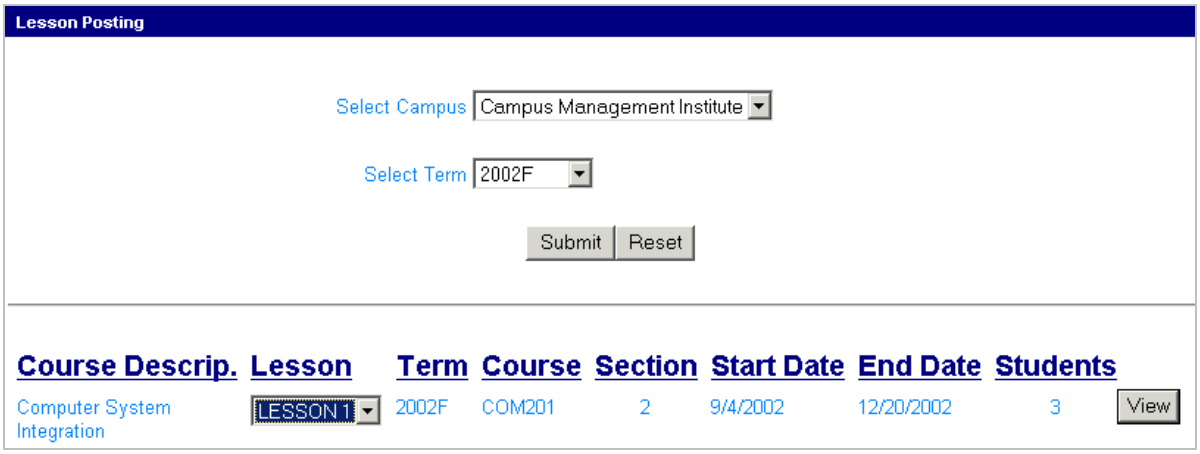
   If the student's name is not highlighted, you do not have permission to add an activity. Contact your system administrator if you need to add student-related activities in Contact Manager.
7. Click **Clear Parameters** to clear the returned student list and the search criteria.
8. Click **Close** to close the search pages.

Lesson Posting

You can view a list of class sections for which to post lessons. The list includes only your courses.

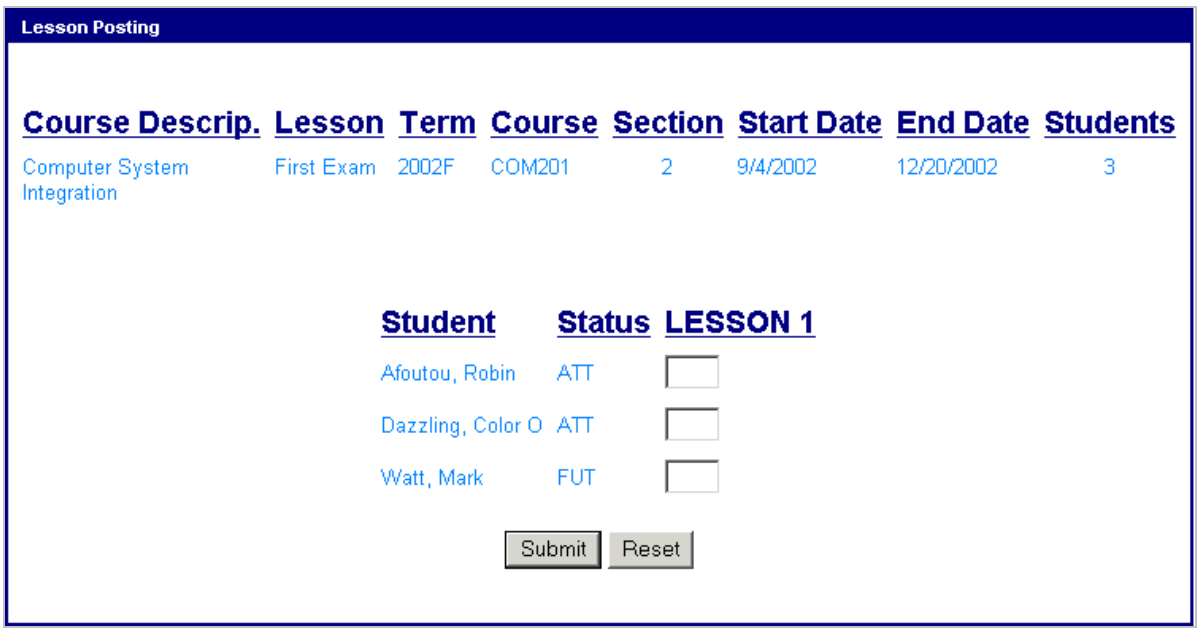


Select a **Campus** and **Term** and click **Submit**. The following form is displayed.



Select the **Lesson** and click **View**.

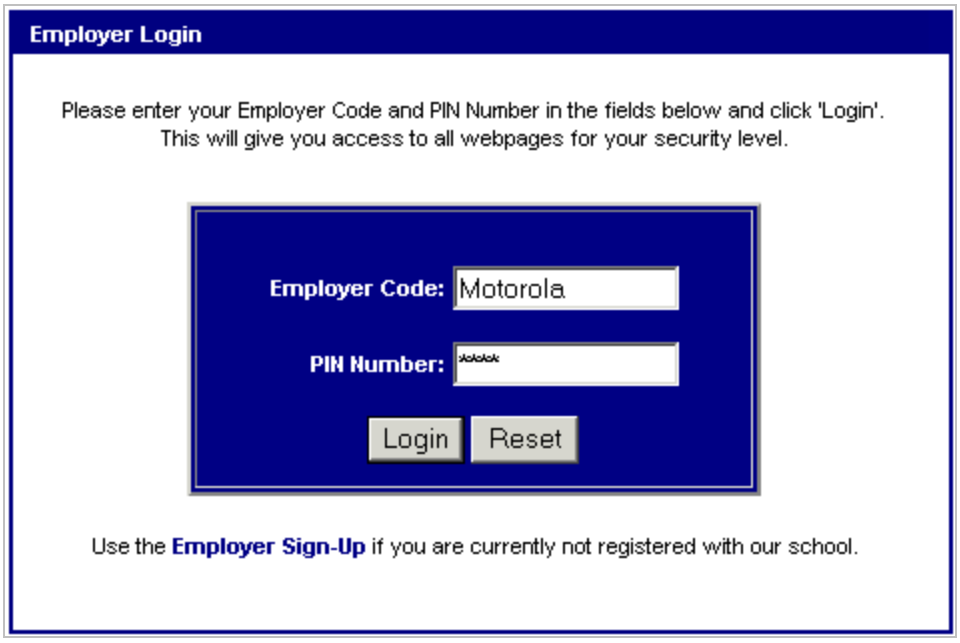
Note: To work with closed terms, select All Terms in the Select Term field.



Enter the lesson **grades** for each student and click **Submit**.

Employer Home Page

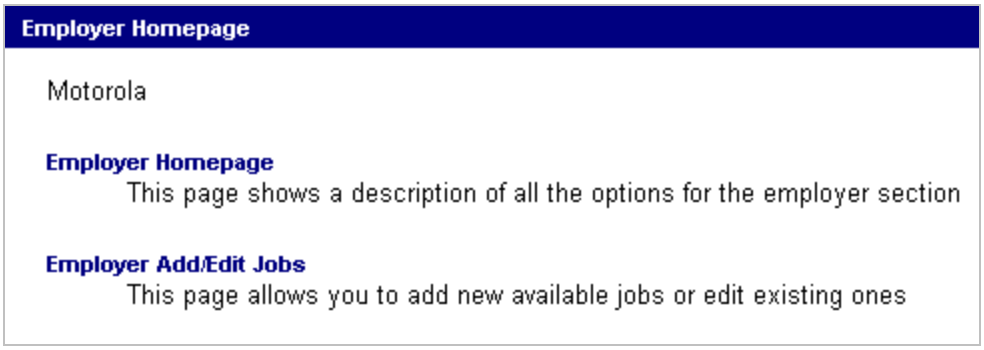
The Employers Login option leads to a login form for your employers.



The Employer Code and PIN are assigned by your institution. If an employer is not currently on the institution's list, the employer can sign up. For more information, see Employer Sign-Up.

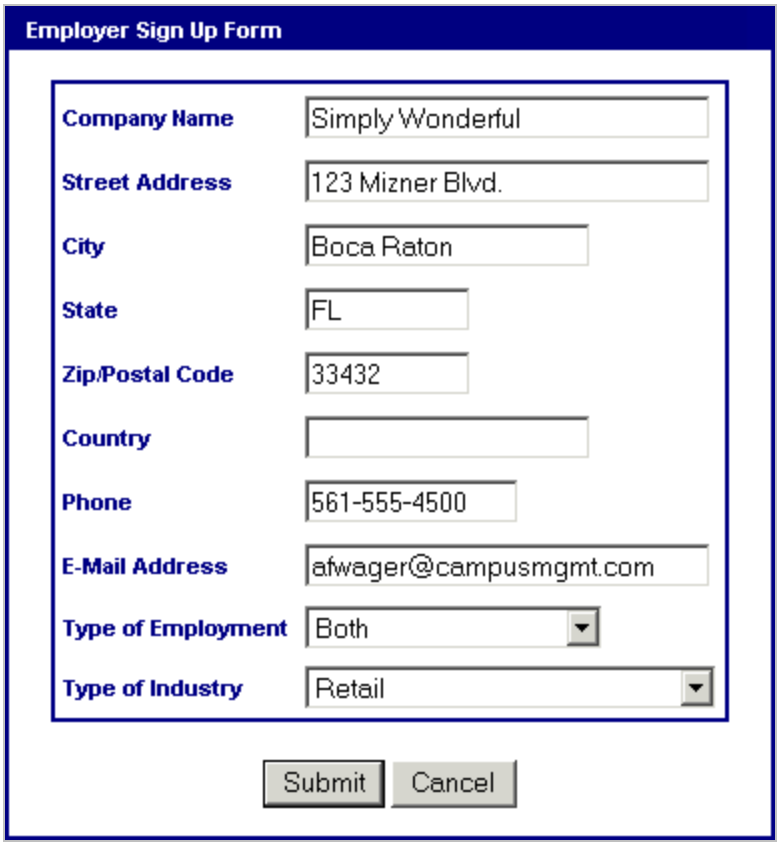
Once an employer has logged in, the Employer Homepage is displayed. Employer services consist of allowing the employers used in your Career Services department to update their job listings–to add, edit, or delete available jobs for graduates, externs, interns, and volunteers.

The Employer Homepage displays the employer's name along with the options for employer activities.



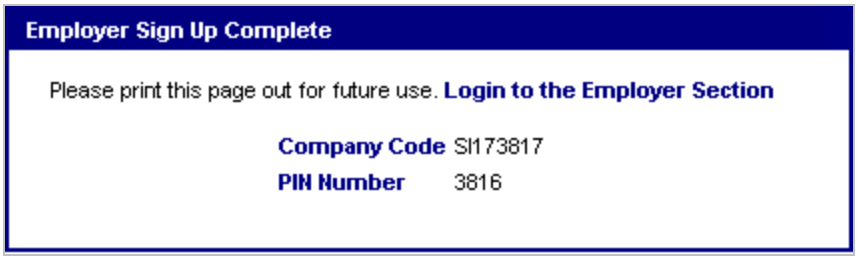
Employer Sign Up

When a new employer clicks **Employer Sign Up** on the login page, the Employer Sign Up Form is displayed.



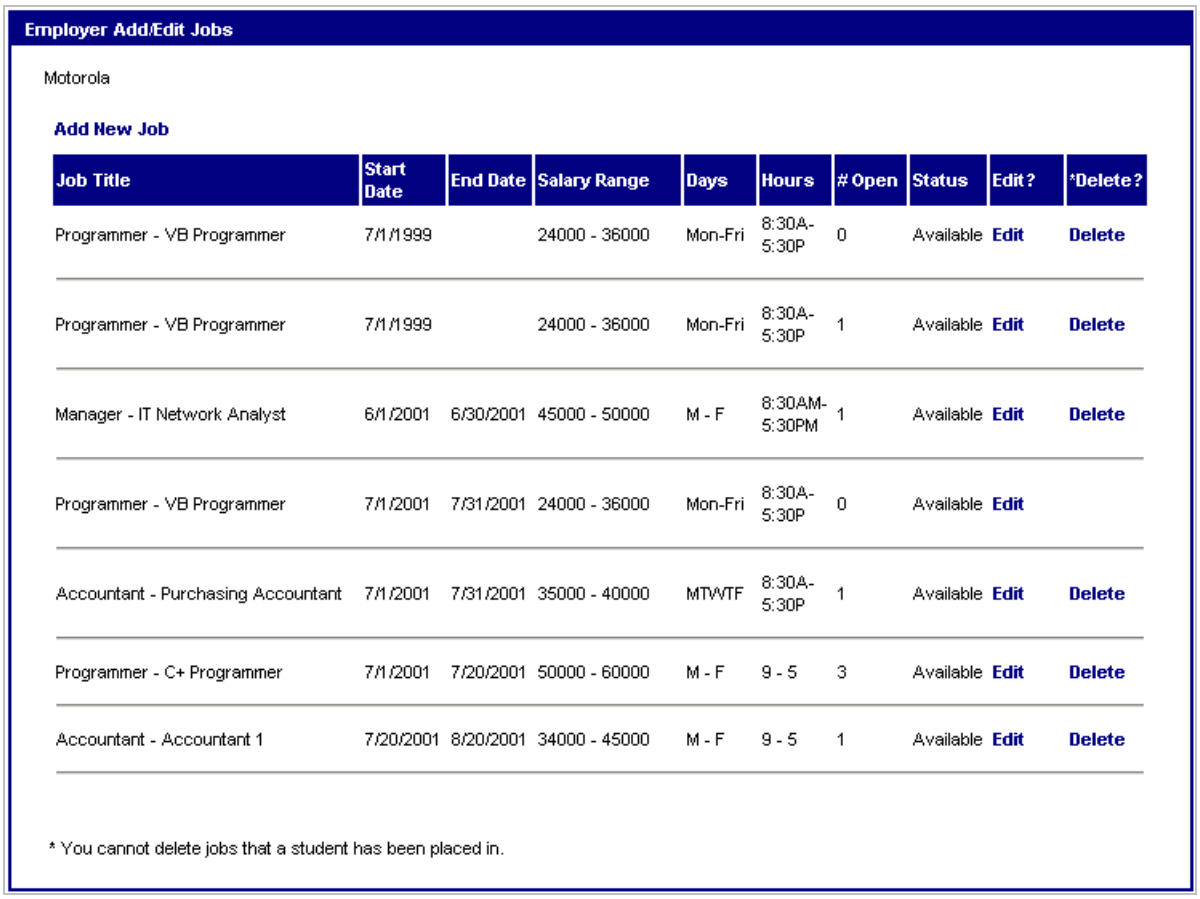
When the employer completes and submits the form, a new employer master record is added to the CampusNexus Student database.

When the data is recorded in the CampusNexus Student Employer database, the new employer's Company Code and PIN are displayed.



Employer Jobs

When the employer selects the Add or Edit Jobs option, a list of jobs from the CampusNexus Student database is displayed. The employer can add new jobs to the listings, edit jobs already on the list, or delete jobs in which students have not been placed.



Employer Add/Edit Jobs

Motorola

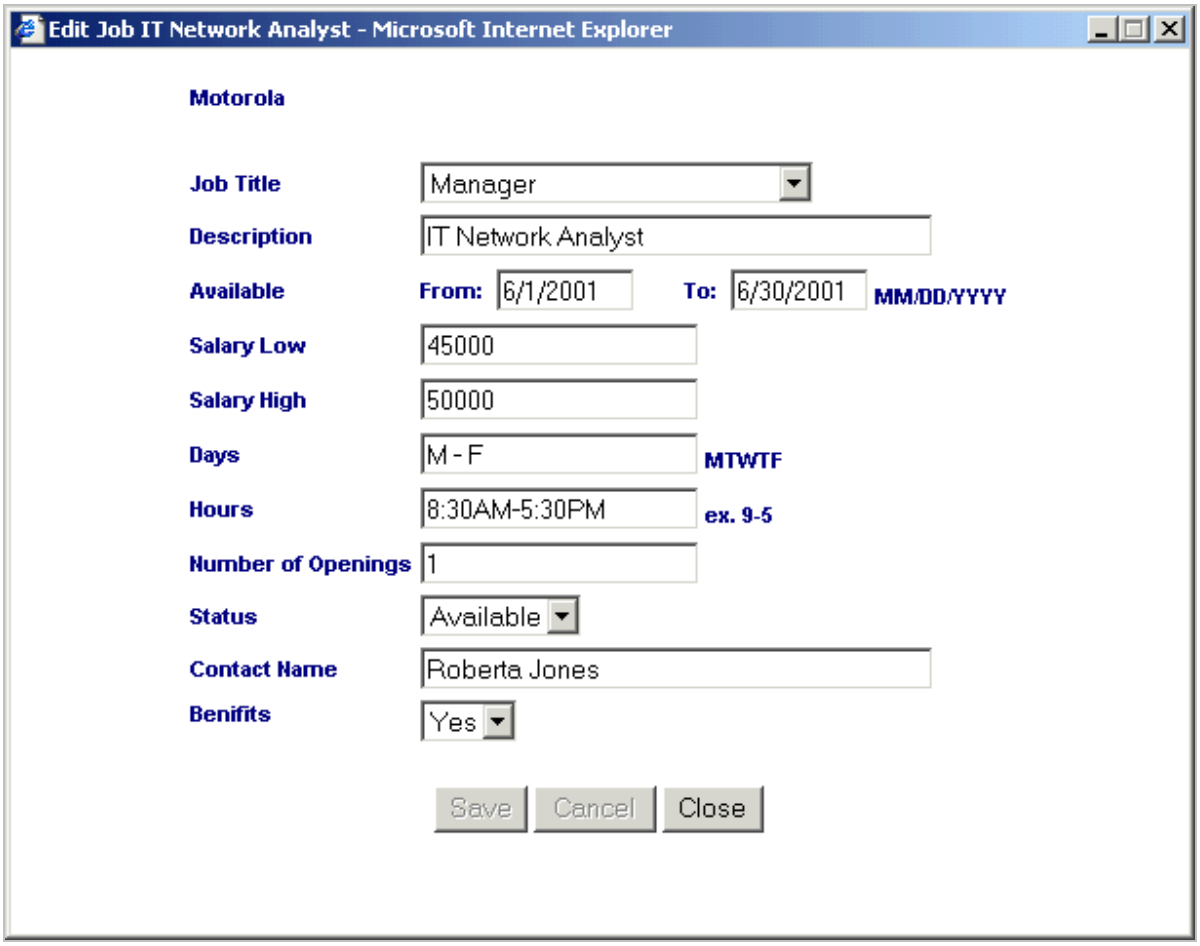
Add New Job

Job Title	Start Date	End Date	Salary Range	Days	Hours	# Open	Status	Edit?	*Delete?
Programmer - VB Programmer	7/1/1999		24000 - 36000	Mon-Fri	8:30A-5:30P	0	Available	Edit	Delete
Programmer - VB Programmer	7/1/1999		24000 - 36000	Mon-Fri	8:30A-5:30P	1	Available	Edit	Delete
Manager - IT Network Analyst	6/1/2001	6/30/2001	45000 - 50000	M - F	8:30AM-5:30PM	1	Available	Edit	Delete
Programmer - VB Programmer	7/1/2001	7/31/2001	24000 - 36000	Mon-Fri	8:30A-5:30P	0	Available	Edit	
Accountant - Purchasing Accountant	7/1/2001	7/31/2001	35000 - 40000	MTWTF	8:30A-5:30P	1	Available	Edit	Delete
Programmer - C+ Programmer	7/1/2001	7/20/2001	50000 - 60000	M - F	9 - 5	3	Available	Edit	Delete
Accountant - Accountant 1	7/20/2001	8/20/2001	34000 - 45000	M - F	9 - 5	1	Available	Edit	Delete

* You cannot delete jobs that a student has been placed in.

Add or Edit Job

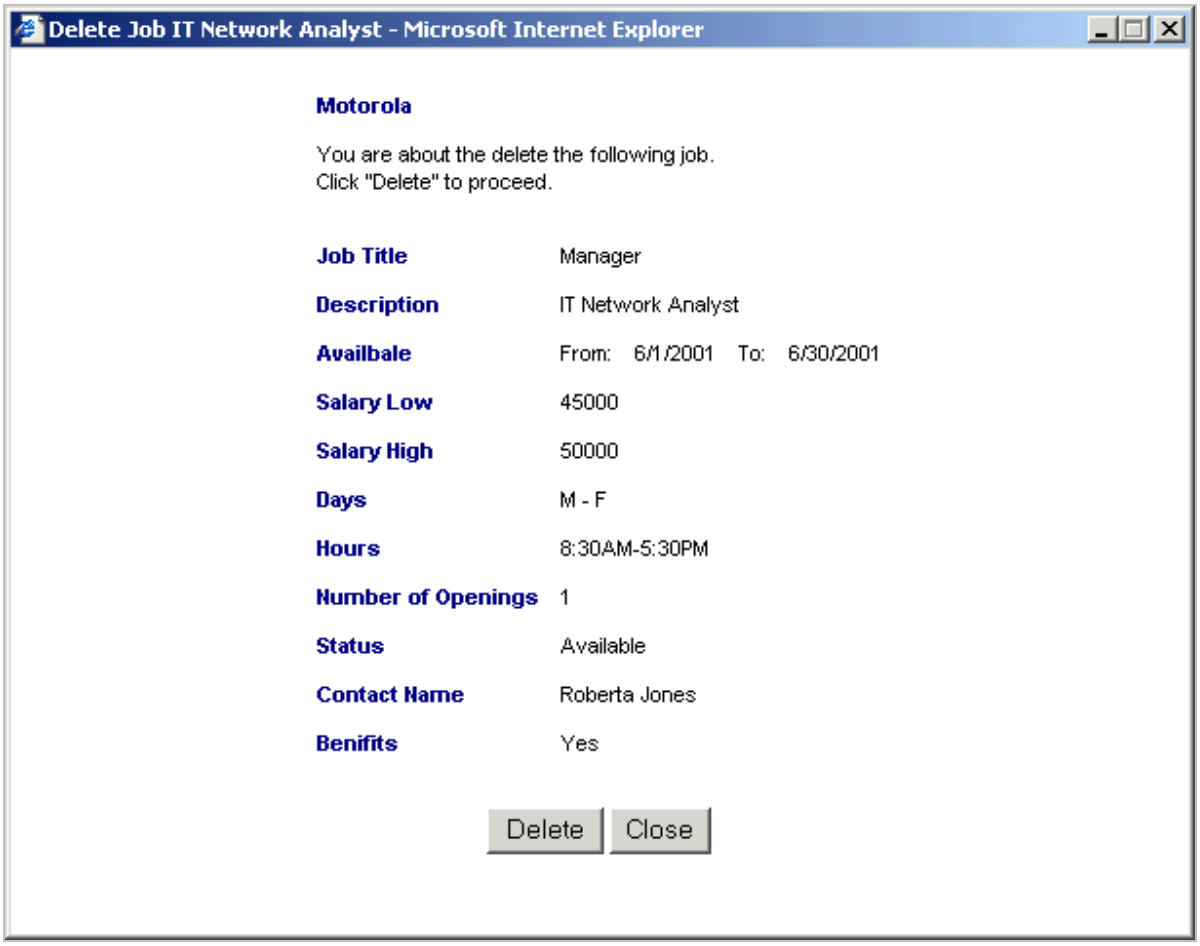
The employer can click **Add New Job**. A blank job editing form is displayed. Otherwise, the employer can click **Edit** on the row of a listed job to view or edit the job details.



The employer completes the job form and clicks **Save** to post the new or edited job. The **Available From and To Dates** refer to the length of time that the job will be open for applicants to apply, not the duration of the job itself.

Delete Job

The employer can **Delete** a job only if a student has not yet been placed in the position. The employment positions have been filled on rows that do not show the Delete option.



Click **Delete** to remove the job opening from the CampusNexus Student database.

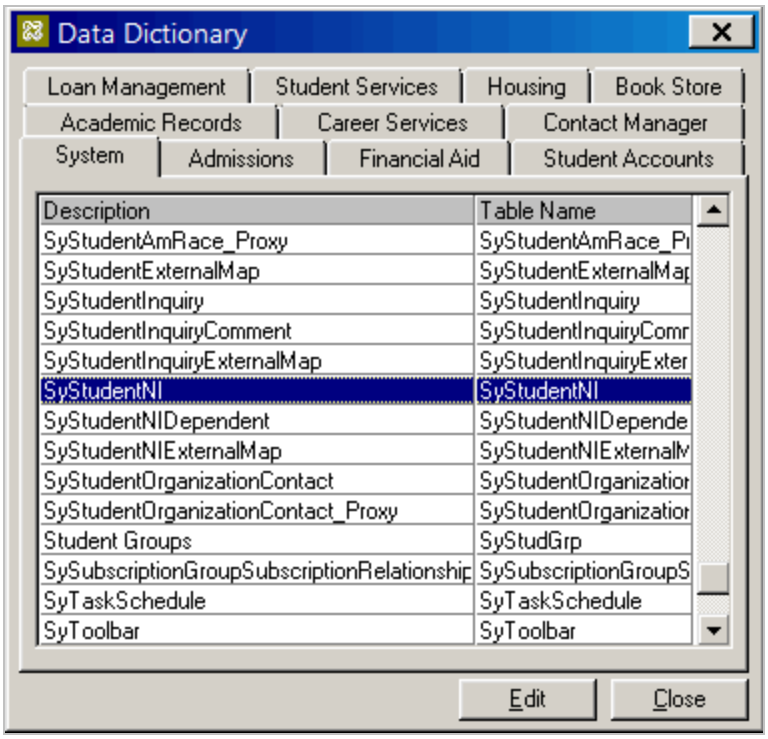
Setup > Data Dictionary

The data dictionary contains descriptions of all data elements used in CampusNexus Student. Each module (e.g., Academic Records, Career Services, etc.) has a list of tables. For each table, there is a list of all columns. For each column, you can control several parameters. You can use the information in the data dictionary when designing custom reports for your institution.

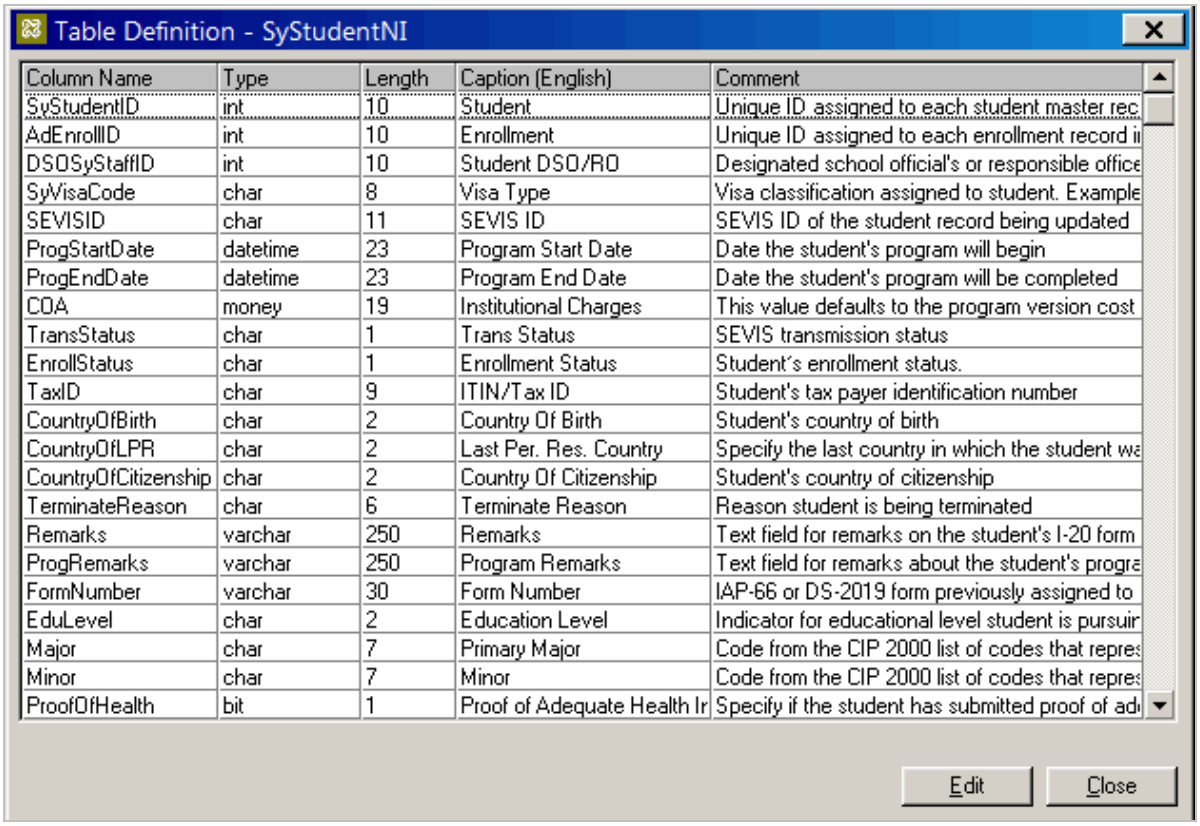
To customize the data dictionary:

1. Navigate to **Setup > Data Dictionary**. The Data Dictionary form is displayed containing a tab for each module.

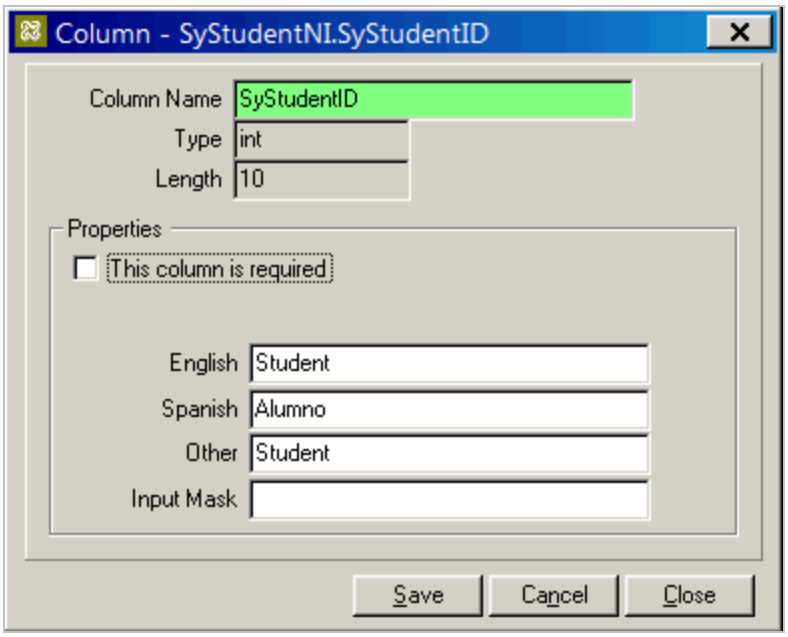
   Each tab represents a list of the tables originated in the module. Tables are only listed once in the data dictionary. If you cannot find the one you are looking for under one tab, check the other tabs. Each tab contains Description and Table Name columns. Click the column headers to sort the fields.



2. Double-click on a **Description**. The Table Definition form for the selected Description is displayed. The form displays the Column Name, Type, Length, Caption, and Comment for each data field. For more information about the data types, see SQL Data Types.



3. Double-click on a row in the Table Definition. The Column definition form is displayed.



4. Specify appropriate options. For more information, see Field Descriptions: Column Definition Form.
5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

Field Descriptions: Column Definition Form

Field	Description
Column Name	This is the name by whichCampusNexus Student identifies this column. It cannot be changed.
Type	This is the type of data stored in this column. It cannot be changed.
Length	This is the length of the column in characters. It cannot be changed.
This column is required	Indicates that the data in this column is required by your institution. If this check box is selected, users must enter information in this column wherever it is displayed in the system. The "required" property can also be specified at the form level. You can change this if necessary.
English Caption	This is the English language caption that is displayed on forms where this column is displayed. You can change the caption if necessary. The language to be used for captions on forms is determined in the System setup form.
Spanish Caption (Español)	This is the Spanish language caption that is displayed on forms where this column is displayed. You can change the caption if necessary.
Other	This is the Other language caption that is displayed on forms where this column is displayed. You can change the caption if necessary.
Input Mask	The input mask determines the format in which data is entered and displayed on forms. An input mask consists of a string of predefined mask characters and literals. Each mask character represents a position in which the user can type a character. Different mask characters allow certain types of input. See the following table for functions of mask characters. The input mask should contain the same number of characters as the length of the field. In the illustration above, the length of the field is 25. Therefore, any mask for this field should contain 25 mask characters. In the case of numeric fields, you want to be sure the mask contains the maximum number of digits that the field can contain. • # - Allows numbers only • & - Allows any character • ? - Allows letters only • A - Allows numbers and letters • U - Allows letters only and makes them uppercase • L - Allows letters only and makes them lowercase • H - Allows hexadecimal values (0-9, A-F only) • \ - Defines a predefined mask characters as a literal • 0-9 - Reserved for user-defined mask characters defined using the **MaskChar** property. A literal is a character or symbol that the user cannot type over. For example, this mask is for a telephone number. (###)###-#### In this example, the parentheses and the dash are literals; they help cue the user about what kind of data to enter. To contain this mask, the field must be a character (varchar) field with a length of at least 13 characters.

SQL Data Types

The Data Dictionary is based on Microsoft's SQL Database Management System. When you access the Data Dictionary and drill down to individual data items, you will see a reference to one of the data types listed in the following table.

SQL Data Types

Type of Data	Base Data Type	Synonyms	Range/Domain	Storage Size
Integer	int	integer	Whole numbers from -2,147,483,648 to 2,147,483,647	4 bytes
Integer	smallint		Whole numbers from -32,768 to 32,767	2 bytes
Integer	tinyint		Whole numbers from 0 to 255	1 byte
Packed Decimal (exact numeric)	numeric (p,s) decimal (p,s)	dec	Whole or fractional numbers from -10^38 to 10^38	2-17 bytes, depending on specified precision, p, which can range to 38 digits. On average, 1 byte of storage is required per every 2 digits of precision.
Floating point (approximate numeric)	float (15-digit precision)	float(n), where n is between 8 and 15 Double Precision	Approximations of numbers from -1.79E308 to 1.79E308 Positive range: 2.23E-308 to 1.79E308 Negative range: -2.23E-308 to -1.79E308	8 bytes
Floating point (approximate numeric)	real (7-digit precision)	float(n), where n is between 1 and 7	Approximations of numbers from -3.40E38 to 3.40E38 Positive range: 1.18E-38 to 3.40E38 Negative range: -1.18E-38 to -3.40E38	4 bytes
Character (fixed length)	char(n)	character (n) character (character without a specific size is synonymous to a 1-character field, char(1))	Up to 255 characters, as designated by the n, of the installed character set	1 byte per character n declared, even if partially unused.
Character (variable length)	varchar(n)	character varying (n) Char varying (n)	Up to 255 characters, as designated by the n,of the installed character set	1 byte per character stored. Declared but unused characters do not consume storage.

Type of Data	Base Data Type	Synonyms	Range/Domain	Storage Size
Monetary	money		Numbers with accuracy to one ten-thousandth of a unit (four decimal places), typically used to store currency values. From -922,337,203,685,477.5808 to 922,337,203,685,477.5807	8 bytes
Monetary	smallmoney		Numbers with accuracy to one ten-thousandth of a unit (four decimal places), typically used to store currency values. From -214,748.3648 to 214,748.3647	4 bytes
Date and Time	datetime		Combined date and time representation. (SQL Server does not have separate DATE and TIME data types.) Date part: 01-JAN-1753 to 31-DEC-9999. Time part: Number of milliseconds since midnight of the given date	8 bytes
Date and Time	smalldatetime		Combined date and time representation. Date part: 01-JAN-1900 to 06-JUN-2079 Time part: Number of minutes since midnight of the given date	4 bytes
Binary (fixed length)	binary(n)		Any binary representation (bit patterns) up to 255 bytes	n bytes, even if n is partially unused.
Binary (variable length)	varbinary(n)	binary varying	Any binary representation (bit patterns) up to 255 bytes	The number of bytes actually stored. No storage for space declared but not used.

Type of Data	Base Data Type	Synonyms	Range/Domain	Storage Size
Long text/BLOB	text and image		Text: Character data up to 2 gigabytes (GB). Image: Binary data up to 2 GB. The text and image data types are always variable length.	If not null, a 16-byte pointer is used on the data page, plus however many 2-KB pages are required to store the actual length. Text and image pages cannot be shared. A single byte entered in a text or image column requires its own 2-KB page (most being unused).
Boolean	bit		0 or 1	Bit data types share a byte with other bit columns of the same table. Hence, 8-bit columns of the same table use one byte of storage. If the table has only 1-bit columns, it still uses 1 byte, although 7 more such columns could be added "for free."

Setup > School Defined Fields

The Setup > School Defined Fields menu option enables system administrators to configure school-defined fields for the following areas:

- Student – Select this menu option to create school-defined fields related to Student records in the following modules:
    - Academic Records
    - Admissions
    - Career Services
    - Financial Aid
    - Housing
    - Loan Management
    - Student Accounts
    - Student Services
- Entity – Select this menu option to create school-defined fields related to the Course entity.

School Defined Fields > Student

You can define data fields that are unique to your operations. Users with appropriate permission can view or edit the student data in school-defined fields by navigating to View > (select a module, e.g., Admissions) > School Fields.

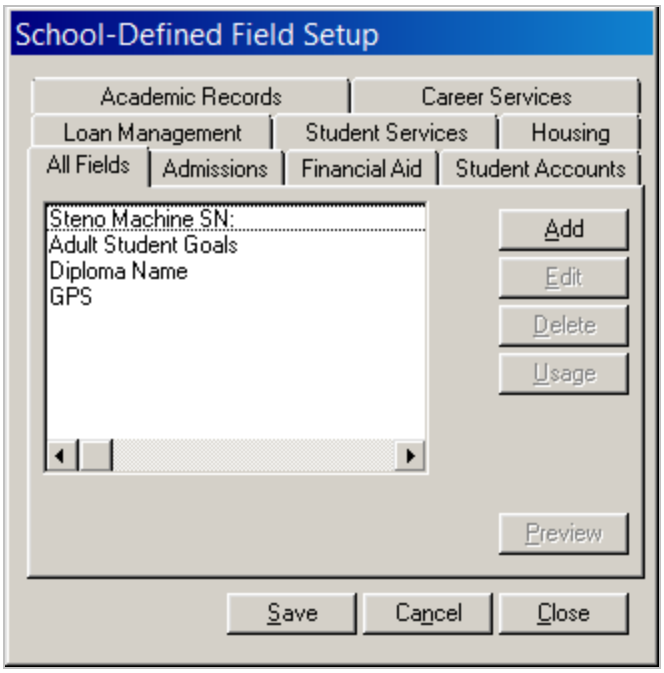
Note: While CampusNexus Student can record your school-defined data, there are no built-in reports for data in school-defined fields. It is your responsibility to create custom reports using Crystal Reports or other tools such as Word and Excel.

To add a school-defined field:

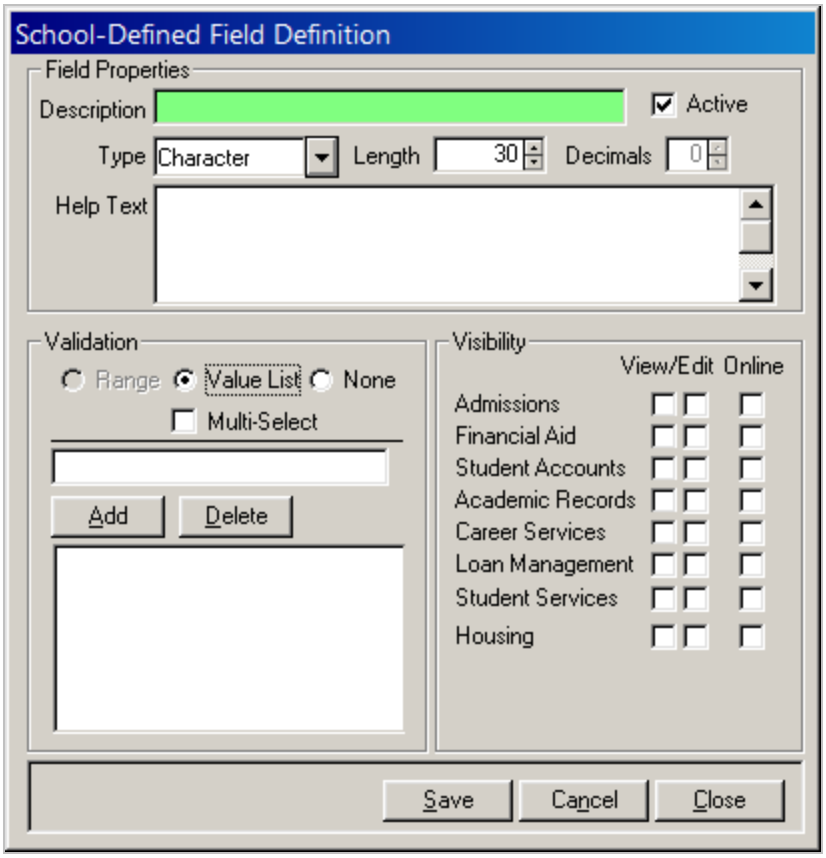
1. Navigate to **Setup > School Defined Fields > Student**. The School-Defined Field Setup form is displayed.

   The All Fields tab lists all fields for all modules. Review this list before setting up a new field to check if it has already been set up.

   Note: The Housing tab is visible only when Housing is enabled in CampusNexus Student.



2. Select the tab of the module for which the new field is being established, e.g., Admissions.
3. Click **Add** or press **Ctrl+N**. The School-Defined Field Definition form is displayed. It contains default values for status (Active), data Type (Character), Length (30), and Validation (None).



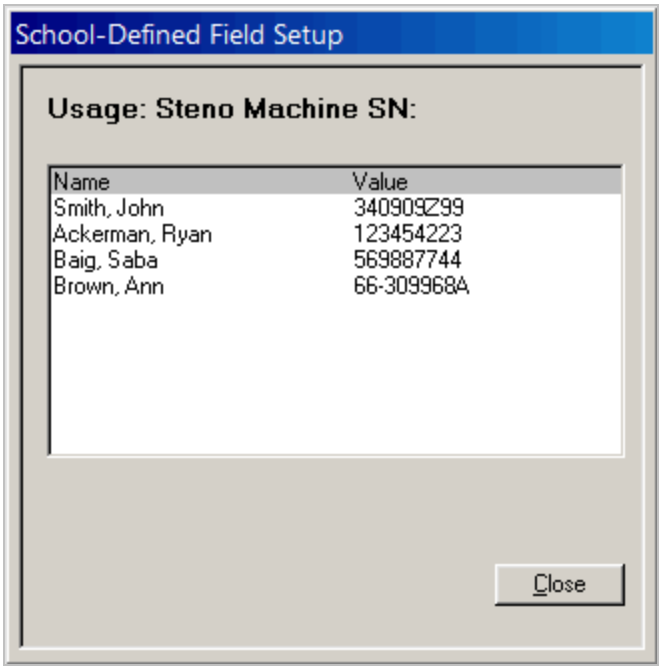
4. Specify appropriate options.

Field Descriptions

Field	Description
Description	Description of the school-defined field.
Active	Indicates whether the field is active.
Type	The following data type options are available: • Character – any alphabetic, numeric, or punctuation character. Maximum length: 4000 characters. • Numeric – only numbers and the plus (+) or minus (-) sign. Maximum length: 12 digits. Maximum decimal places: 4. • Date – automatically set up for 8 characters. You can enter dates in any date format, for example, 11/15/2001.
Length	Specify the length of the school-defined field.
Decimals	Specify the number of decimal places for a numeric field.

Field	Description
Help Text	Help text that is displayed when the field "has focus" on a form. **Note**: The French Student Master uses some of the Help Text fields for customized program purposes. These can be recognized by their *InitCapNoSpaces* syntax. Modifying these Help Text fields causes the French Student Master to work improperly. This is not a problem for Long or Short Student Masters.
Validation	The following validation options are available: • Range – This option is available for numeric values. Specify the lower limit in the **From** box and upper limit in the **To** box. • Value List – Specify a value in the text box and click **Add** to add it to the list of acceptable values. To remove a value from the list, select the value and click **Delete**. • If Value List is selected, the Multi-Select option is enabled. The Multi-Select Value List allows you to select more than one item from the list defined for the school-defined field. • None – Select this option if validation is not required.
Visibility	Select appropriate check boxes to make the field viewable and/or editable and to make the field available online from Portal.

5. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form. You are returned to the School-Defined Field Setup form.
6. Click and to adjust the position of the fields on the form. The position of a field may vary according to the module from which it is being viewed.
7. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.
8. Click **Preview** to preview how the field will look on the data entry form.
9. Click **Usage** to view how a field is being used in CampusNexus Student.
10. A confirmation message is displayed. Click **Yes**. A detailed list of the students who have data in the selected school-defined field is displayed.



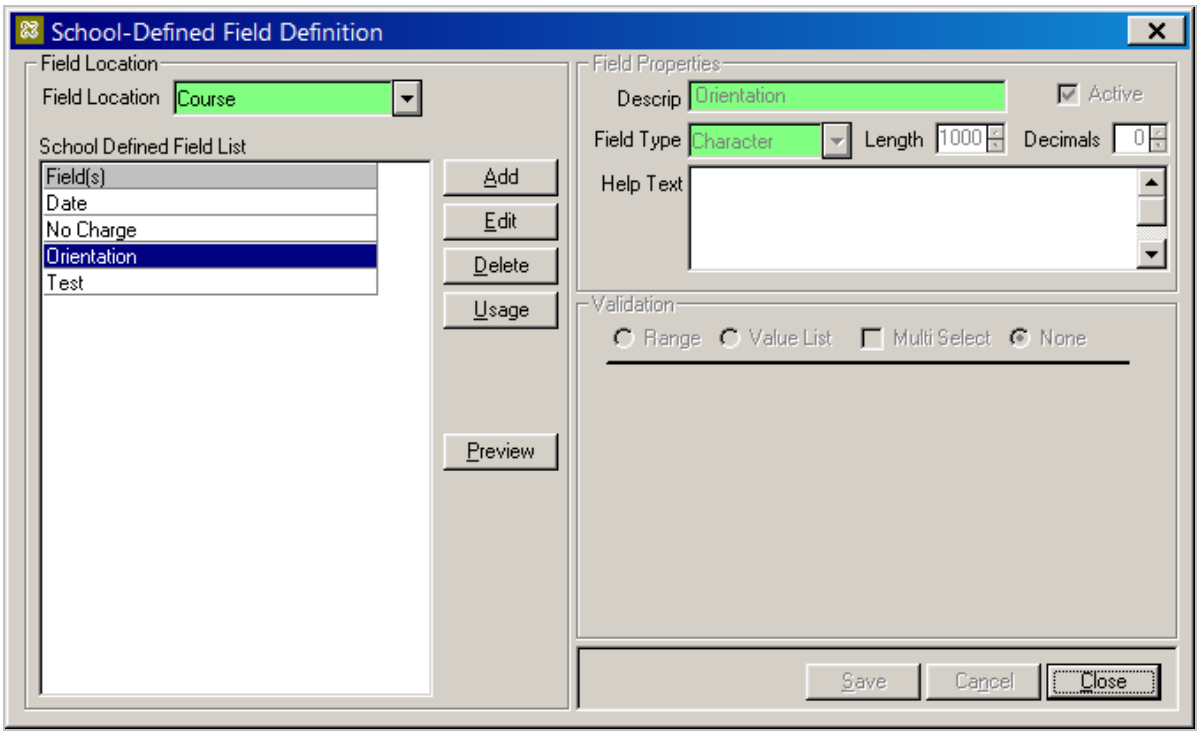
11. Click **Close** to close the form. You are returned to the School-Defined Field Setup form.
12. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

School Defined Fields > Entity

The School-Defined Field Definition form enables system administrators to configure school-defined fields for the Course entity. The school-defined fields will appear on the Other Info tab of the Courses Code Setup form (Lists > Academic Records > Courses > Add/Edit > Courses Code Setup).

To configure a school-defined field for the course entity:

1. Navigate to **Setup > School Defined Fields > Entity**. The School-Defined Field Definition form is displayed.



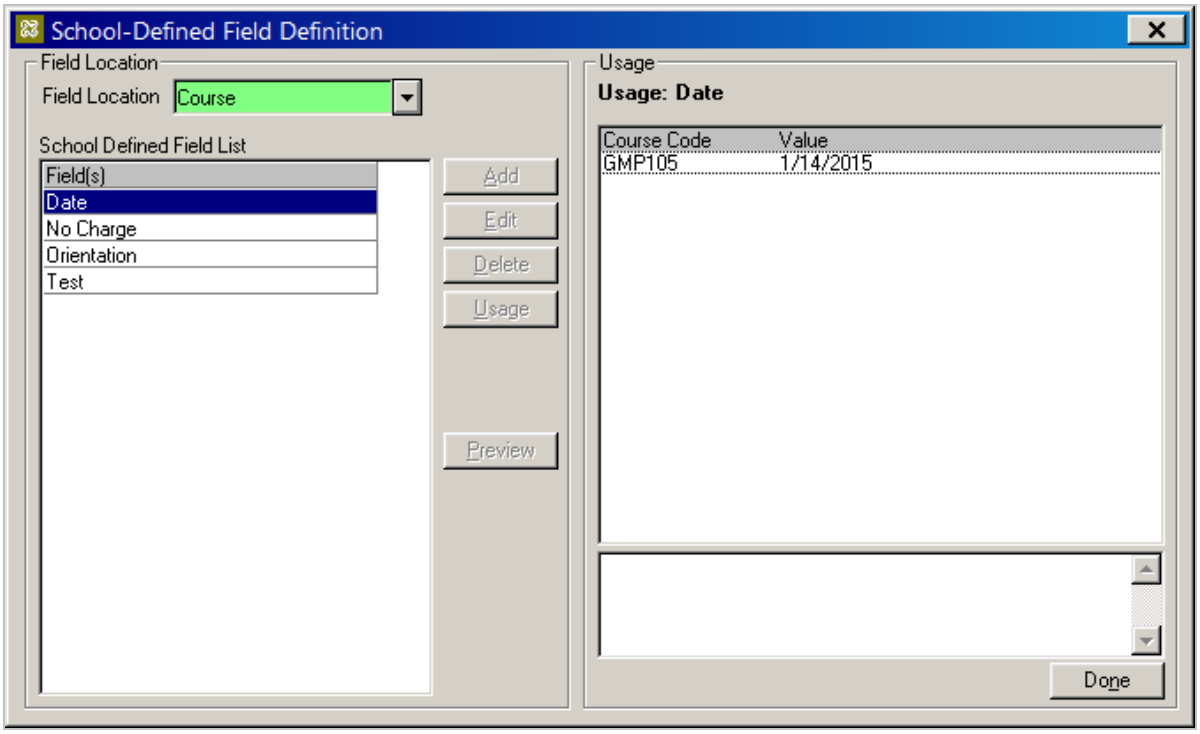
2. The **Field Location** field currently contains only one option: Courses.
3. Click **Add** to add a field.
4. Enter a **Description**.
5. Select the **Field Type**. The options are:
   - Character – any alphabetic, numeric, or punctuation character. Maximum length: 1000 characters.
   - Numeric – only numbers and the plus (+) or minus (-) sign. Maximum length: 9 digits including decimals.
   - Date – automatically set up for 8 characters. You can enter dates in any date format, for example, 11/15/2001.
6. Select the **Validation** method. The options are:
   - Range – This option is available for numeric values. Specify the lower limit in the **From** box and upper limit in the **To** box.
   - Value List – Specify a value in the text box and click **Add** to add it to the list of acceptable values. To remove

a value from the list, t, select the value and click **Delete**.

- If Value List is selected, the Multi-Select option is enabled. The Multi-Select Value List allows you to select more than one item from the list defined for the school-defined field.
- None – Select this option if validation is not required.

7. Specify **Help Text** that is displayed when the field "has focus" on a form.
8. Click **Save**. . Notice that your new school defined field is now displayed in the School Defined Field List.
9. Select the field in the School Defined Field List and click **Usage**.

   If the field is used, you are prompted to view the details. When you select Yes, the records using this field and associated values are displayed. Click **Done** to return to the previous form.



10. Select the field in the School Defined Field List and click **Preview**.

    The Preview form displays the location of the controls for the fields added under the specific field location. Click **Close** to return to the previous form.

11. Manage the saved fields on this list by using the **Edit** and **Delete** buttons.

    If you try to edit or delete one of the listed saved fields, and that field is used by any course, a warning message is displayed. If you choose to continue with the action, the saved field's values are also edited or deleted from its related field locations.

Setup > Required Fields

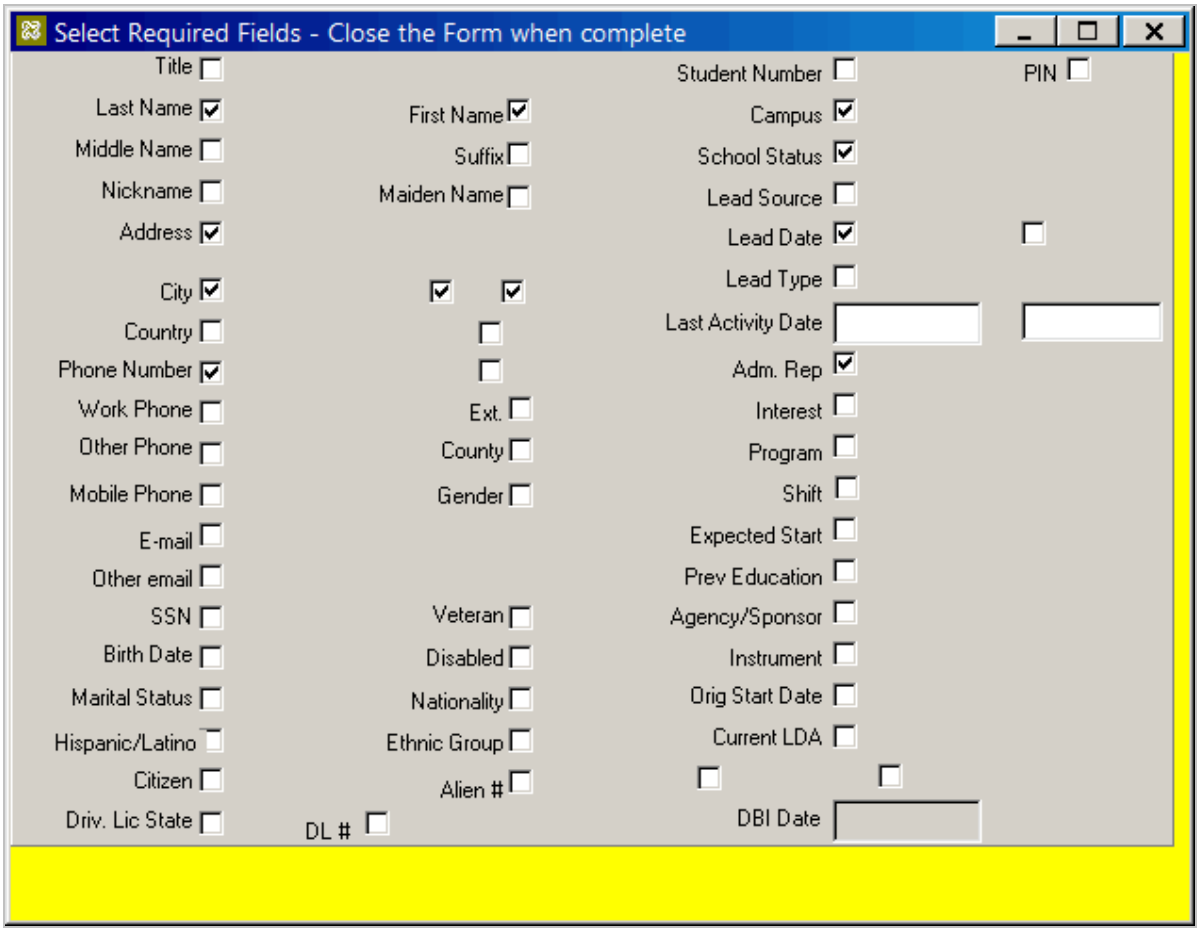
CampusNexus Student contains three kinds of required fields:

1. Fields that are required by CampusNexus Student for proper operation. You cannot change the characteristics of these fields or to make them optional.
2. Fields that are marked as required by your institution in the Data Dictionary. These fields are required to have data in them no matter where they are used.
3. Fields that are marked as required by the institution on certain data entry forms. For instance, those that are required on the Student Master form, but not on the Quick Lead Form. You can mark data entry fields, for example, telephone numbers, date-of-birth, ethnic group, etc., as being essential to your operations even though they are not required for basic CampusNexus Student operation.

This topic covers the third kind of required field.

To set up required fields on a form:

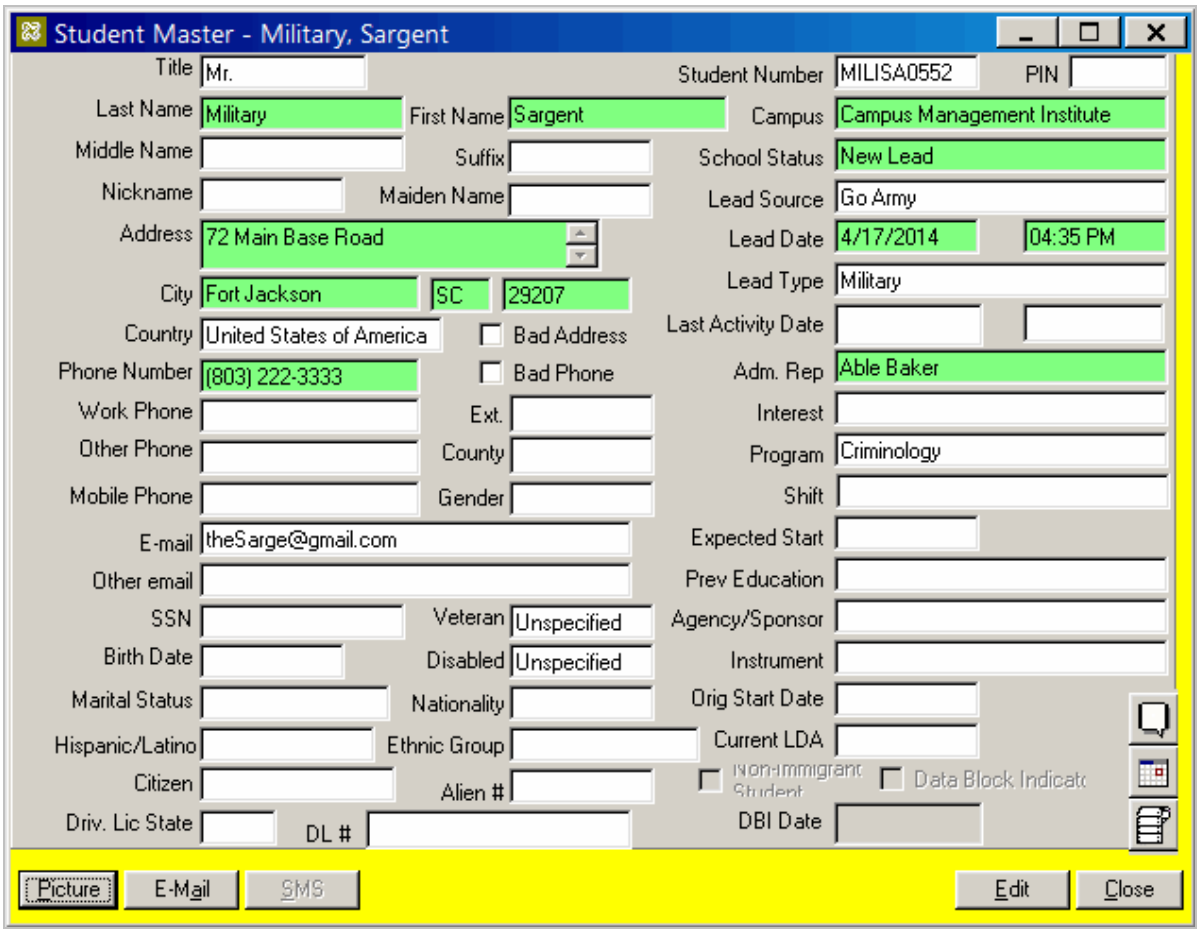
1. Open the desired form. For example, open the Student Master form for any student, or press **Ctrl+N** to open a blank one.
2. Navigate to **Setup > Required Fields**. The Select Required Fields form is displayed. It contains a representation of the selected form showing check boxes for each field.



3. Select the fields you want to be required. A check mark next to a field name means that when the form is being edited, the field must have data in it before the form can be saved. Unless other specific validation rules apply, any non-blank character(s) in the field are enough to satisfy this requirement. In the example, the Postal Code and Telephone (home) have been selected.

   Note: By requiring the Postal (ZIP) Code you will automatically also get the City and State because CampusNexus Student will fill them in when the ZIP code is entered.

4. When you have selected or cleared the necessary fields, click ☒ to close the form and save your settings. The next time the form is opened the required fields will have a colored background.



Notes:

- Set up a background color to identify the required fields on all forms by navigating to Setup > System > General tab. Double-click Required Fields Color to access the color selection dialog box.
- The required fields on the Quick Lead form are not necessarily the same as those on the Student Master form. See the Quick Lead Form Design feature under Setup > Admissions.

Setup > Field Level Security

Field level security enables you to control who can view and/or change fields on the forms. If you choose not to expose some data to certain persons in your organization, you can establish a staff group for those persons. Then, you can designate certain fields to be unavailable to members of that group. Such fields will be blank when viewed by members of the group. No indication as to the length or content of the data in the field will be visible.

Comparison of security between field level security and the primary security feature:

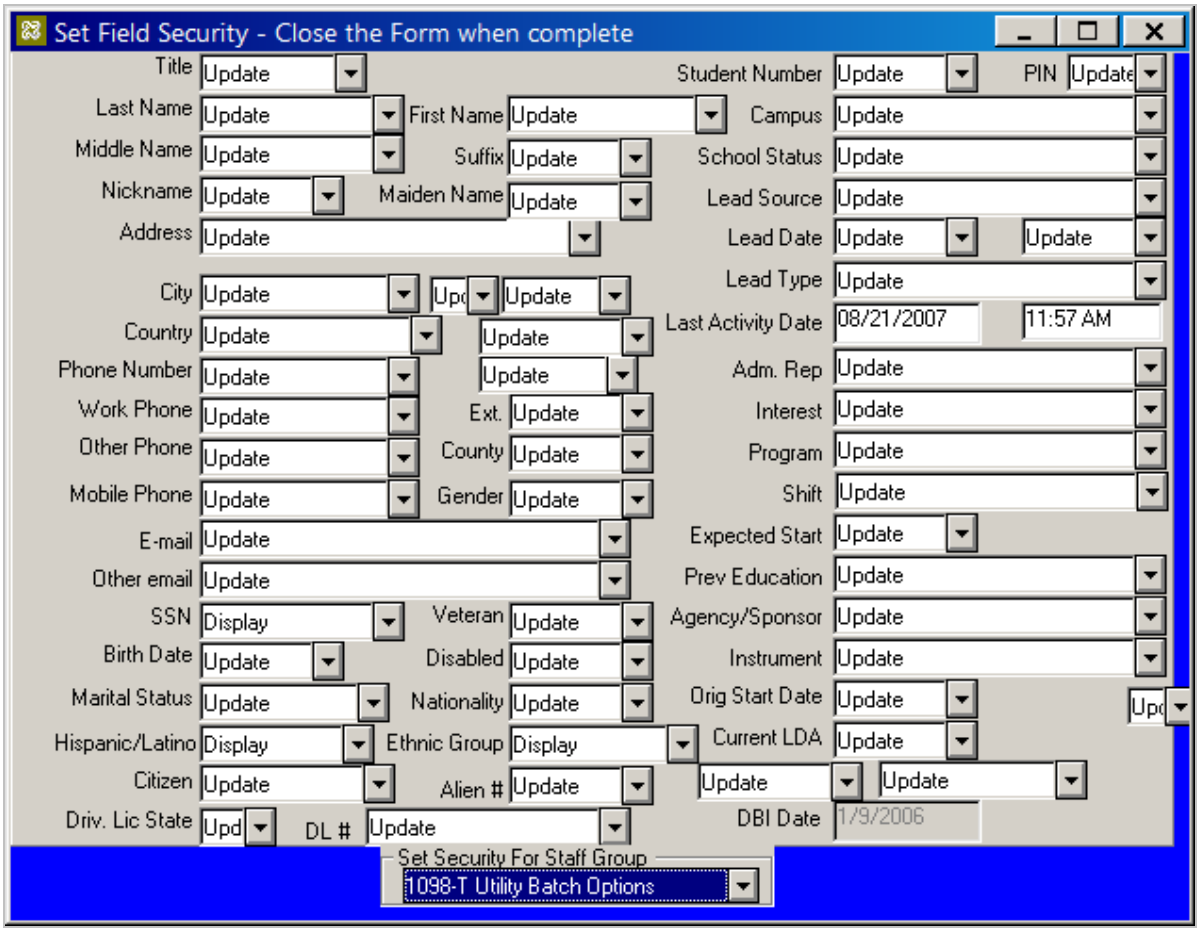
- **Setup > Security**: Users assigned to multiple groups receive the **least** restrictive level of security granted in any group to which they have been assigned. For example, a staff member who has read-only capability in the instructor group and edit capability in the advisor group, will have edit capability in the instructor group.
- **Setup > Field Level Security**: Users assigned to multiple groups receive the **most** restrictive level of security granted in any group to which they have been assigned. For example, a staff member who has read-only capability in the instructor group and edit capability in the advisor group will have read-only capability in the instructor group.

The 'Field Level Security Mode' setting on the System Settings form determines how field level security behaves when a user belongs to more than one staff group and each group has different levels of field-level access.

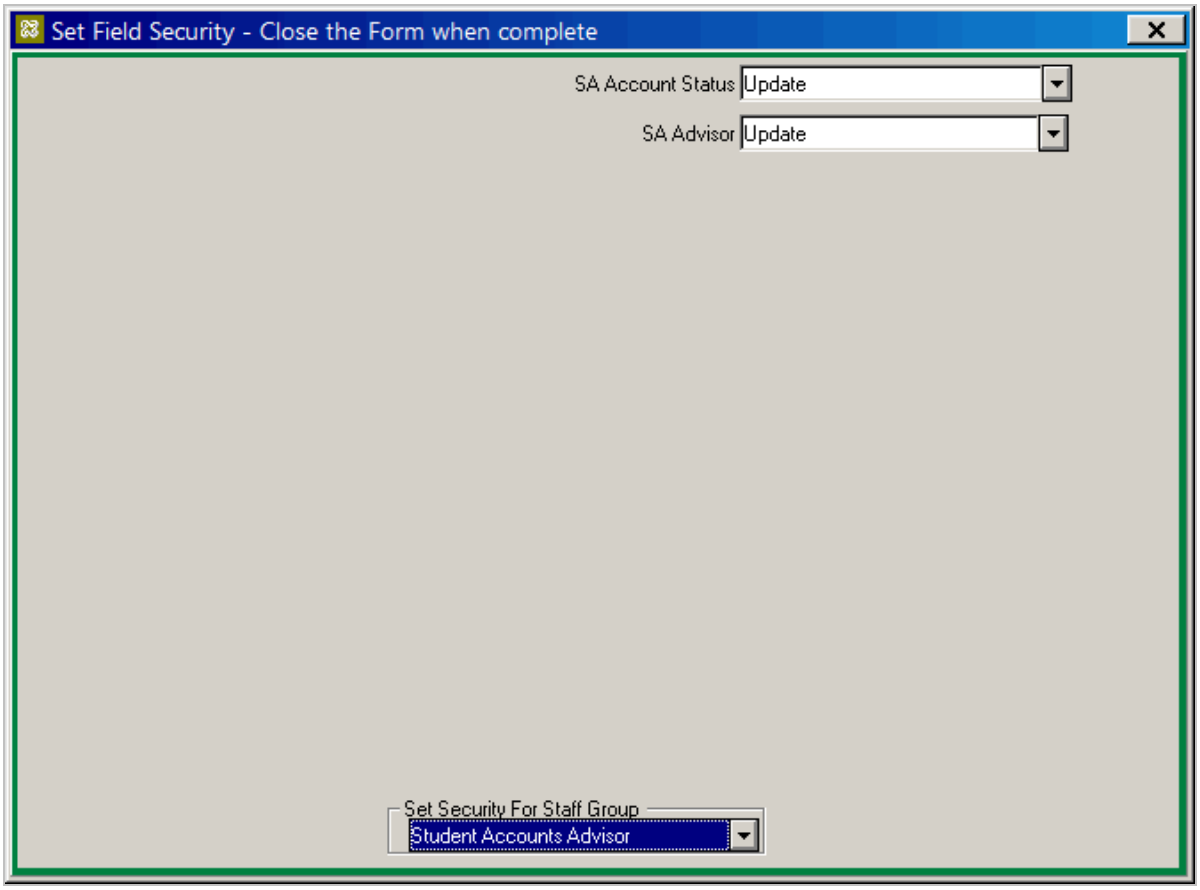
To configure field level security:

1. Open the desired form, for example, Student Master.
2. Navigate to **Setup > Field Level Security**. The Set Field Security form is displayed. It contains a representation of the selected form showing list boxes for each field and a list of staff groups in a list box. The settings for each field are initially displayed as *Update*.

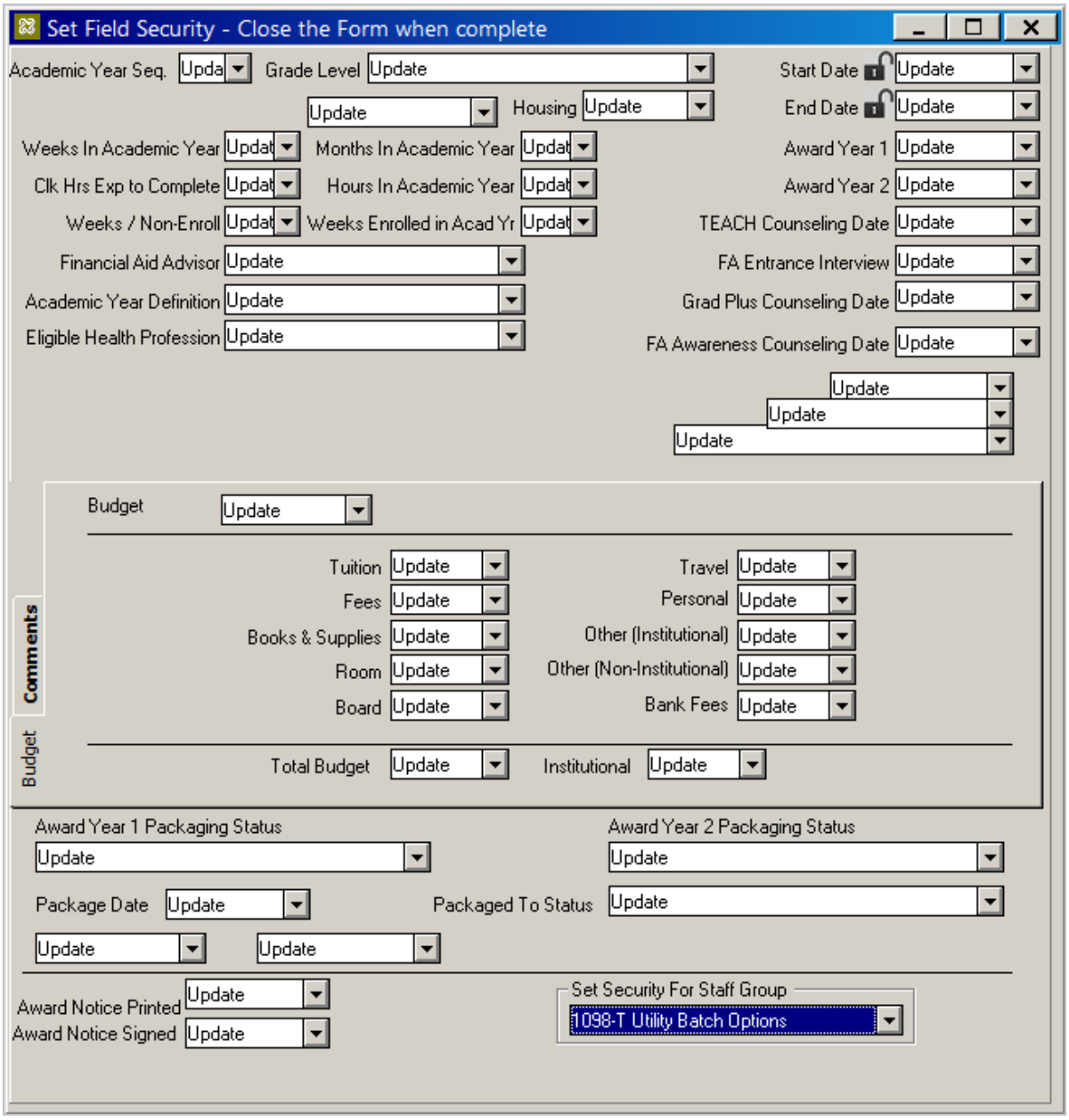
Field level security for Student Master form



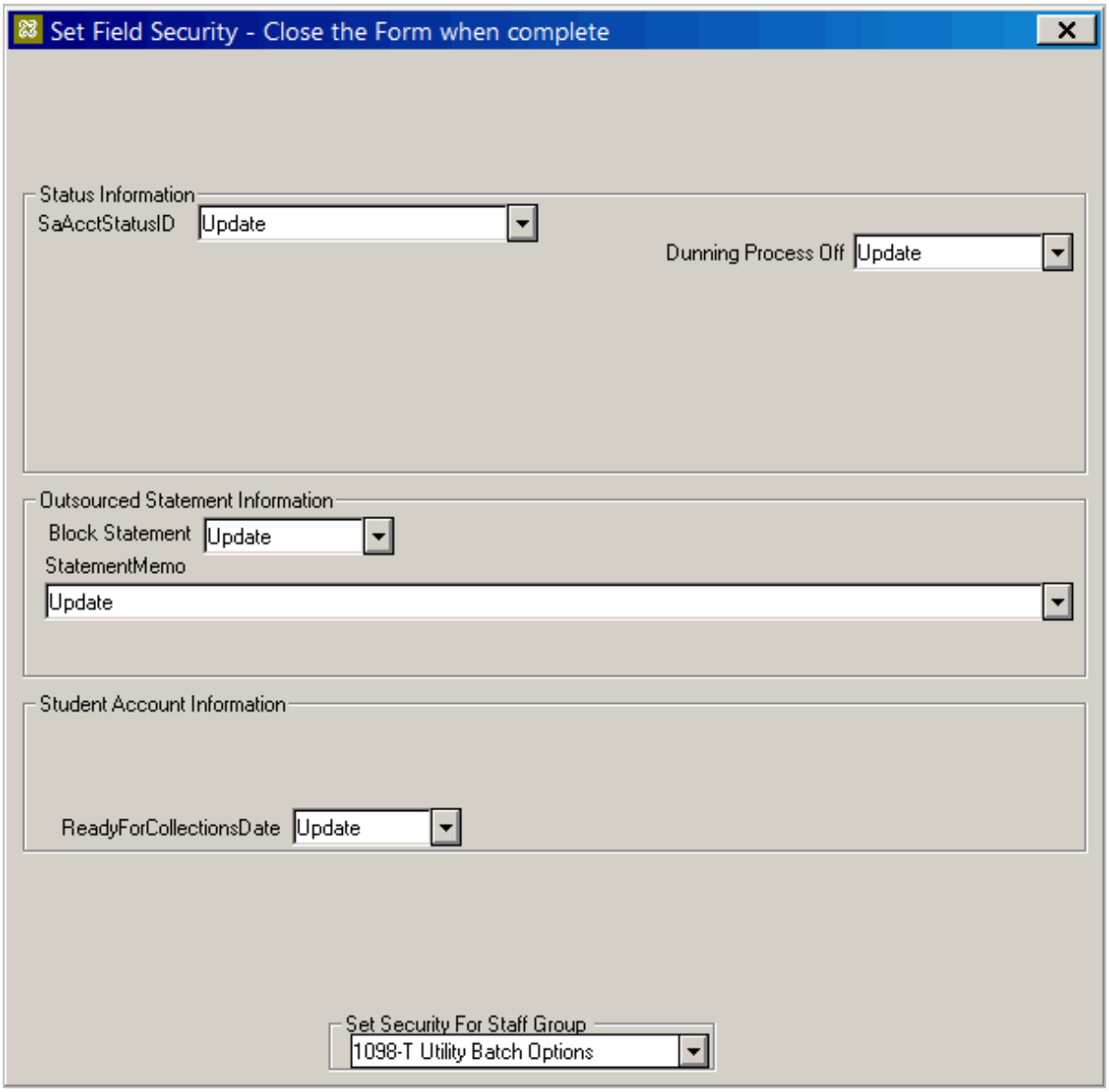
Field level security for Student Ledger Card form



Field level security for Financial Aid Academic Year form



Field level security for Collections form



3. From the **Set Security For Staff Group** list, select the staff group for which you want to set field level security.
4. Select one of the following permissions for each field:
   - **Update**: The field can be displayed and changed by the members of the selected group.
   - **Display** (default): The field can be displayed but not changed by the members of the selected group.
   - **None**: The field cannot be displayed or changed by the members of the selected group.
5. When you have set the security options for the necessary fields and for each staff group, click to save your settings. When the form is closed, the field level security records for the group are written to the database.

Follow this procedure or every staff group to establish the baseline field level security records.

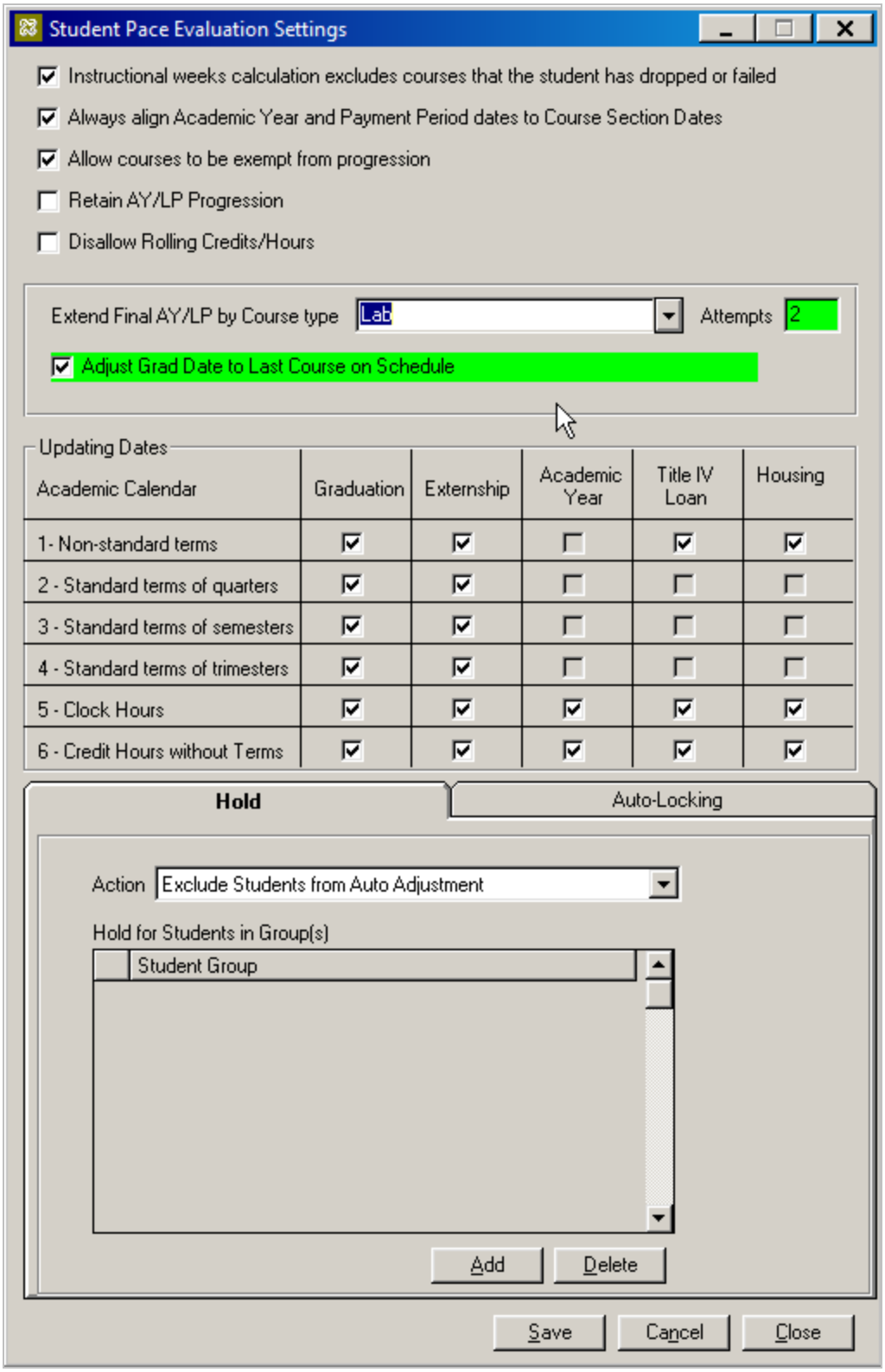
Setup > Student Pace Evaluation Settings

The Student Pace Evaluation Settings form is a central location for all date configurations the Student Pace Evaluation (SPE) tool uses when updating student dates. The dates affected include:

- Graduation
- Externship
- Academic Year
- Title IV Loan Period
- Housing Lease

To configure student pace evaluation settings:

1. Navigate to **Setup > Student Pace Evaluation Settings**. The Student Pace Evaluation Settings form is displayed.



2. Specify appropriate options. For more information, see Field Descriptions.
3. Click **Save** to save the changes (or click **Cancel** to discard the changes). Click **Close** to close the form.

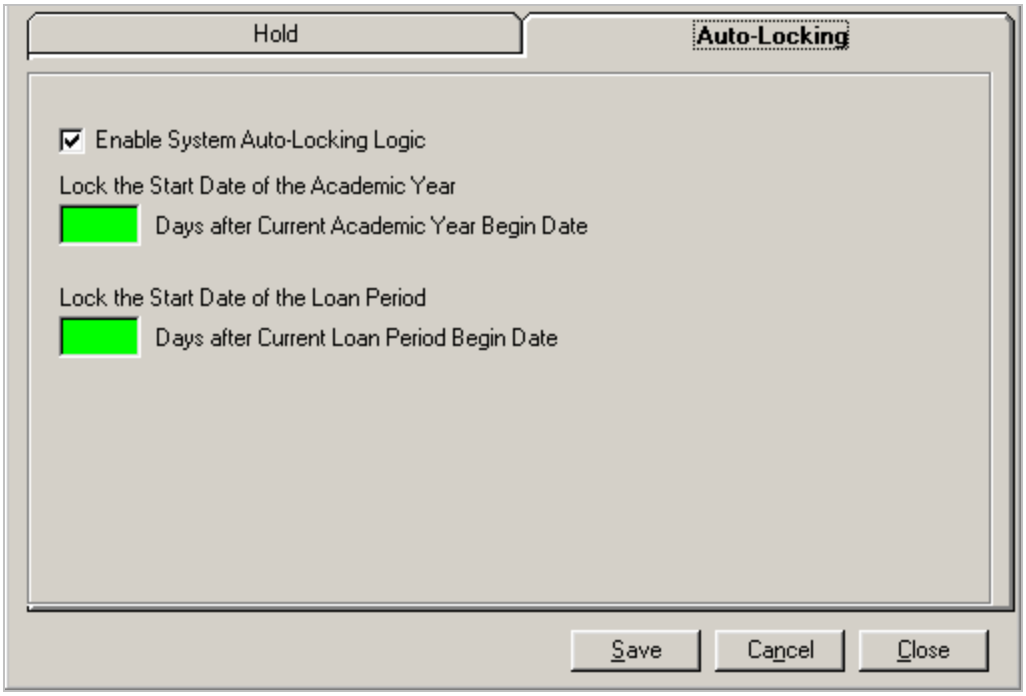
Field Descriptions

Field	Description
Instructional weeks calculation excludes courses that the student has dropped or failed	When this option is selected, a student's dropped or failed courses are not included in the Instructional Weeks (IW) calculation.
Always align Academic Year and Payment Period dates to Course Section Dates	When this option is selected, the payment period ends on the course section end date, and the next payment period start on the next day if a course is current. If no course is current, the next payment period starts on next course start date. A retake course is allowed to start a subsequent payment period even if the prior instance of the course earned the credits or hours; however, the credits or hours and weeks would not count toward progression of the payment period.

Field	Description
Allow courses to be exempt from progression	This configuration allows the SPE tool to measure student progression using only courses that are part of the program version course list and meet a minimum grade point if configured. If no minimum grade point is configured, a course with a posted grade uses the “Credits Earned” flag to determine if the course meets progression requirements. Financial Aid officers will see that non-term Students can now register for courses outside their program requirements without affecting the timing of Title IV disbursements. **Important Note**: With this flag enabled, CampusNexus Student uses the Enrollment Status Credits (Hours) value instead of the Credit or Hours value of the course. This applies to transfer credits, CLEP courses, etc. when building remaining academic years and loan periods to complete the program version requirements. CampusNexus Student tracks an SPE start date which is the latest of the following dates (Program Version Start Date (if blank, Exp. Start Date), Area of Study (AOS) transfer complete, Reentry > 180). There is an SPE flag on the student schedule where CLEP or Transfer credits/hours, as well as associated course work with passing grades and meeting any minimum grade point requirements that are before the SPE start date, are flagged as “R” which reduces the number of credits needed to complete after the SPE start date. Associated course work after the SPE start date and any courses on the schedule that meet the program requirements are used for progression “Y”. Courses not meeting program requirements are flagged as “N”. When this feature is enabled on the SPE tool and a student takes a course that is not configured in the Program Version Course List to apply to the pace progression criteria, the SPE tool ignores the course when calculating academic year (AY) and payment period (PP) dates, and makes adjustments based on the information associated with the next scheduled course that applies to the student's program version. Also, if a posted final grade for a course does not meet the minimum grade point criteria established on the Program Version Course List, the course is not considered when progressing the student through the student's program version. CampusNexus Student also uses this criterion when determining the graduation date for the student. **Note**: • Registrars with permissions on the User Info tab - Academic Records can override the system evaluation of these courses, regardless of the course category or minimum grade point requirements. • You can change a Course Category using the DPA fulfillment logic and move a course to Taken Not Applied to change how the SPE tool evaluates the course. See Working with the Degree Progress Audit (Edit Mode). After the "Allow courses to be exempt from progression" check box is selected, the following message is displayed: *The system has detected auto locking is not enabled. Enabling Course Progression could affect the dates of completed Academic Years and Loan Periods. It is strongly recommended that all prior completed Academic Years and Loan Periods be locked prior to enabling this feature. For more information, please read Help for configuring the "Auto Locking" feature.*

Field	Description
Retain AY/LP progression	This setting indicates that confirmation is to occur on Academic Year/Loan Period (AY/LP) sequence attributes (credit/hours and weeks). When "Allow courses to be exempt from progression" is enabled, AY/LP evaluation logic **must use the enrollstatuscredits/hours value** from all course work linked to the enrollment that would reduce the credits/hours needed to complete the enrollment. Performing an Area of Study change that would not include course work from the prior Area of Study (AOS) or Program Version (PV) that resides in a completed payment period. The "Retain AY/LP progression" check box must be selected to initiate this logic. The AY/LP logic uses a centralized function to determine if a course is used to progress the student for the PV/AOS of the new enrollment after a transfer or the new AOS when an AOS change is performed. When Course progression is turned on Total credits completed = course work that would progress the student (function returns “R” and uses Enrollment Status Credits value) + transfer credits(also use enrollment status credits) + CLEP courses (also use enrollment status credits). The number of AY/LP sequences needed is adjusted to meet Credits Required - total enrollment status credits completed.
Disallow Rolling Credits/Hours	When this option is selected, schools can progress the Academic Year (AY) and associated Payment Periods using the same logic as the Loan Period (LP) and associated Loan Payment Periods. This means the dates for Academic Years will align with dates of Loan Periods throughout the students’ life cycle. The centralized logic in CampusNexus Student can calculate Academic Year dates in this fashion even if the student has no loan periods. **Note**: Extra credits and weeks earned by a student during an AY or LP will not roll over into a subsequent AY or LP.
Extend Final AY/LP by Course type	This setting allows you to extend a final AY/LP date by the length of specified course type when schools require students to show competency in their degrees. CampusNexus Student also allows you to configure a specific number of attempts to extend the final AY/LP date.
Adjust Grad Date to Last Course on Schedule	This setting allows the SPE to extend the graduation date to the last course on the schedule even if it does not apply to the student's chosen area of study. This setting is not optional if "Extend Final AY/LP by Course type" is configured.
Updating Dates	This grid of configurable options allows you to specify which student dates should be updated by the Student Pace Evaluation (SPE) tool based on the program version academic calendar.
Graduation	Configure the updating of Graduation date for academic calendars 1 through 6.
Externship	Configure the updating of Externship date for academic calendars 1 through 6.
Academic Year	Configure the updating of Academic Year date for academic calendars 5 and 6. **Note**: The check boxes for academic calendars 2, 3, and 4 are always disabled.

Field	Description
Title IV Loan	Configure the updating of Title IV Loan Period date for academic calendars 5 and 6. When a student fails to progress as expected, this may cause their Loan Period to be extended. Should the Loan Period be extended, SPE will make the corresponding adjustments to the BBAY Start and End Dates by extending the BBAY Start and End Dates by the same number of days the Loan Period Start and End Dates have extended. In order for the Loan Period dates and BBAY dates to be adjusted by the SPE evaluation process, the Title IV Loan configuration must be enabled on the SPE settings or checked at the time of SPE evaluation.
Housing	Configure the updating of Housing Lease date for academic calendars 1 through 6. **Note**: All check boxes in the Updating Dates grid default to the selected state, except for the six (6) check boxes that are always disabled (for Academic Year and Title IV Loan dates).
Hold Tab	Use this tab to create a Hold Group containing students that will be excluded from the Student Pace Evaluation. **Note:** If a student is a member of an SPE Hold group, SPE will restrict modification to the any of the student's dates. Use the **Action** list to designate an action that will prevent a Student Group from being evaluated by the Student Pace Evaluation tool, i.e., prevent any dates from being updated for the student. Upon clicking an Action in this list, the corresponding Student Group(s) are displayed in the grid. 'Exclude Students from Auto Adjustment' is currently the only Action available for selection. The **Hold for Students in Group(s)** grid displays the Student Groups that have been configured to be excluded from the Student Pace Evaluation. Click **Add** to add a Student Group to the grid; click **Delete** to remove a selected Student Group from the grid.

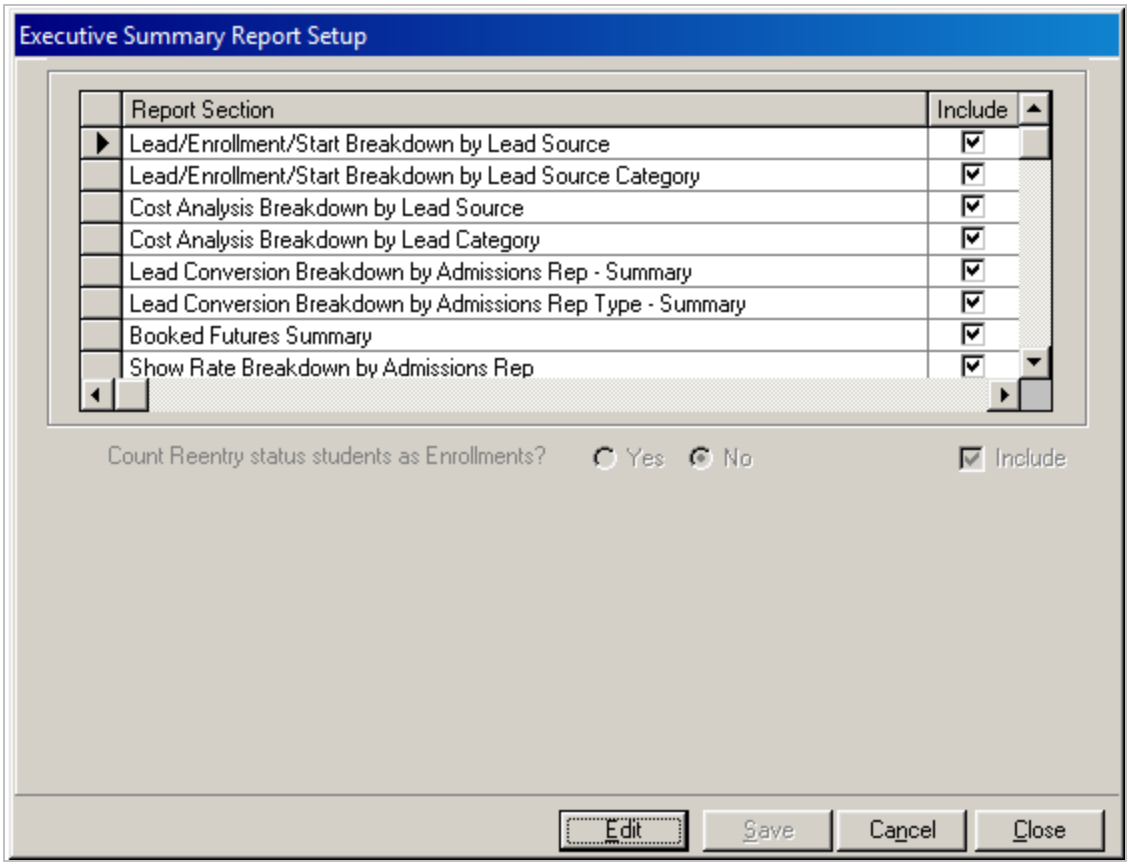
Field	Description
Auto-Locking Tab	Use this tab to enable the 'System Auto-Locking Logic'. This option creates an automated process that locks past and current payment periods of students with a Last Date of Attendance (LDA) greater than 180 days. When an academic year sequence begins, CampusNexus Student locks the start date and thus locks all previous academic year start dates in non-term programs. Financial Aid and Student Account offices may require the auto-lock option to prevent CampusNexus Student from updating the start dates of the academic year or payment period for enrolled and active students. **Note**: If the Allow courses to be exempt from progression is selected, auto-locking should be enabled. Always configure auto-locking and course exemption from progression before running a Student Pace Evaluation job.  When you select **Enable System Auto-Locking**, you must specify how many days after the begin date of the academic year or loan period you want CampusNexus Student to lock the start date of the academic year and/or loan period. Enter a numeric value between 1 and 999 (days) in one or both of the following conditionally required fields: • **Lock the Start Date of the Academic Year ___ Days After Current Academic Year Begin Date** • **Lock the Start Date of the Loan Period ___ Days After Current Loan Period Begin Date** Click **Save** to save the auto-lock configuration. CampusNexus Student captures the number of days entered and locks the Academic Year and/or Loan Period accordingly. Click **Cancel** to return to the previous settings.

Setup > Executive Summary Report

The Setup menu provides the option of customizing the report preferences for each of the sections in the Executive Summary Report so that the default options are closer to the report preferences that are typically run.

To customize the Executive Summary Report:

1. Navigate to **Setup > Executive Summary Report**. The Executive Summary Report Setup form is displayed.



2. Select the report section that you want to modify.
    - Click **Edit** to activate the form and then enable, disable, or modify options as required.
    - Select the **Include** check box to include the report section in the Executive Summary Report.
    - Click **Save** to retain your choices or **Cancel** to close the form without saving any changes.

    Repeat this step for each report section.
3. Click **Close** to close the form.

Help Menu

The Help menu options are as follows:

- Contents
- Regulatory Help
- Automated Processes Help
- Custom Help
- Help on the Web
- About

The links for Regulatory Help and Automated Processes Help are enabled only if you have access to these features.

Contents

The main Help system consists of many topics covering every aspect of CampusNexus Student operations. To open the Help system, select **Help** > **Contents** or press the **F1** key. Use the *Contents* or *Search* tabs to find information.

Tabs

The tabs in the left pane of the Help system provide the following tools:

- **Contents** – The table of contents shows book and topic page icons. When you double-click a book icon, the book is opened and a list of topic pages is displayed. Click the plus (+) symbol beside any book icon to expand the list associated with it. Click a topic icon to open the topic in the main help window.
- **Search** – The search tool provides a way to find words or phrases in any topic of the Help system. Click this tab and enter the search text. To search for a phrase that contains spaces, enclose it within quotation marks (for example, "available jobs").

  After you entered the search text, press **Enter** or click **List Topics**. The Help system displays a list of all topics that contain the search text. Double-click a topic title to view the related topic page. You can also click a topic title and then click **Display**.
- **Favorites** – Use the Favorites tab to bookmark your frequently visited Help topics. Click **Add** to add the currently displayed topic to the Favorites. Use **Display** to jump to any selected topic from the list. Click **Remove** to remove a selected item from the Favorites list.

Toolbar Descriptions

Tool	Description
Hide	Hides the left pane of the help window. The button changes to Show. Click **Show** to bring back the left pane.
Locate	Locates the position of a topic in the table of contents. (The topic location is also indicated by the bread-crumbs at the top of the topic page.)
Back	Goes back to the topic you previously viewed.
Forward	Goes forward to a topic you previously viewed.

Tool	Description
Refresh	Refreshes the current Help topic. For example, if you searched a term and the search highlights are on, click Refresh to remove the search highlights.
Home	Goes to the home page.
Font	Increases or decreases the font size of the Help system.
Print	Prints the current topic.
Options	Click this button to access the following options: • hide/show the left pane • go backward/forward in the list of topics you have viewed • go to the home topic • stop viewing the Help system • refresh the help window • print topic • turn off/on search highlights.

Shortcut Menus

When you right-click in the left pane, the **Print** option is displayed.

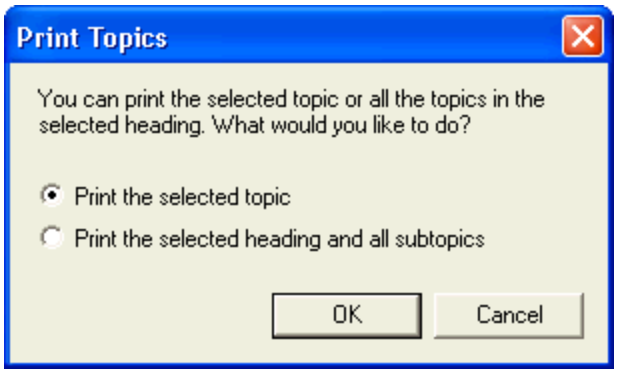
When you right-click in the right pane, a shortcut menu with the following options is displayed:

- **Back** – Takes you back one topic.
- **Forward** – Takes you forward one topic.
- **Select All** – Selects all text and graphics in the current topic.
- **View Source** – Displays the HTML source code for the current topic page.
- **Print** – Prints the current topic.
- **Refresh** – Refreshes the current topic on your screen.
- **Properties** – Displays the properties of the current HTML page.

Printing Topics

You can print any displayed topic by clicking the **Print** icon at the top of the Help window, or right-click on the topic text and select **Print** from the shortcut menu.

In the Contents panel, you can right-click a book icon or a topic icon and choose the **Print** option from the shortcut menu. If you then choose **Print the selected heading and all subtopics**, all the pages for all topics that are subordinate to the selected book are printed. Click **Print the selected topic** to print the page for a single topic.



⚠ Use caution when choosing to print one of the first-level "books". Some of them have hundreds of pages.

Custom Help

The Help system delivered with CampusNexus Student includes a means by which you can add your own notations or topics at your discretion. Navigating to **Help** > **Custom Help** opens a file named *Private_Help.html* that is located in the same directory as the CampusNexus Student Help system. By editing and saving this file, it can serve as the home page for your own customized notes, or as a link to a more extensive internal Help system located elsewhere.

To implement Custom Help, use any standard HTML editor to edit the *Private_Help.html* file (or replace this file with your own file of the same name).

Note: Renaming the *Private_Help.html* file -- or removing it from the CampusNexus Student Help System directory -- breaks the **Help > Custom Help** link and your access to any customized Help you may have added. It's a good idea to make a backup copy of the *Private_Help.html* file and keep in a different directory. While CampusNexus Student updates will not overwrite the file once it has been installed on your system, if someone at your site accidentally removes the file, you can replace it with the backup copy.

Help on the Web

From the CampusNexus Student Help menu, select **Help on the Web** to go to ServiceDesk, and log on with your user name and password. If you don't have this information, call us at **800-483-9106**.

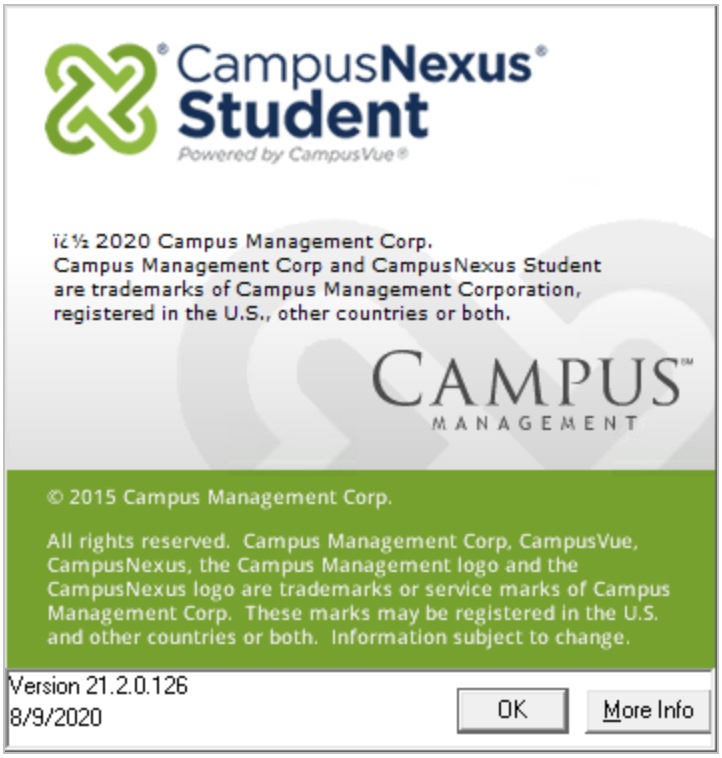
The email address for our Support department is support@campusmgmt.com. Clicking this link opens your email client with this address as the destination of a new message.

A setting in the System Settings form controls the use of the *Help on the Web* option. When the **Prevent Web Access** option is set to **Yes**, the *Help on the Web* option is removed from the *Help* menu. The default setting is **No**.

About

Basic version and environment information about your Anthology Inc. product is available in the About window.

1. From the Main Menu, navigate to **Help** > **About**. Depending on your license, the CampusNexus Student or CampusNexus® Student version information is displayed.



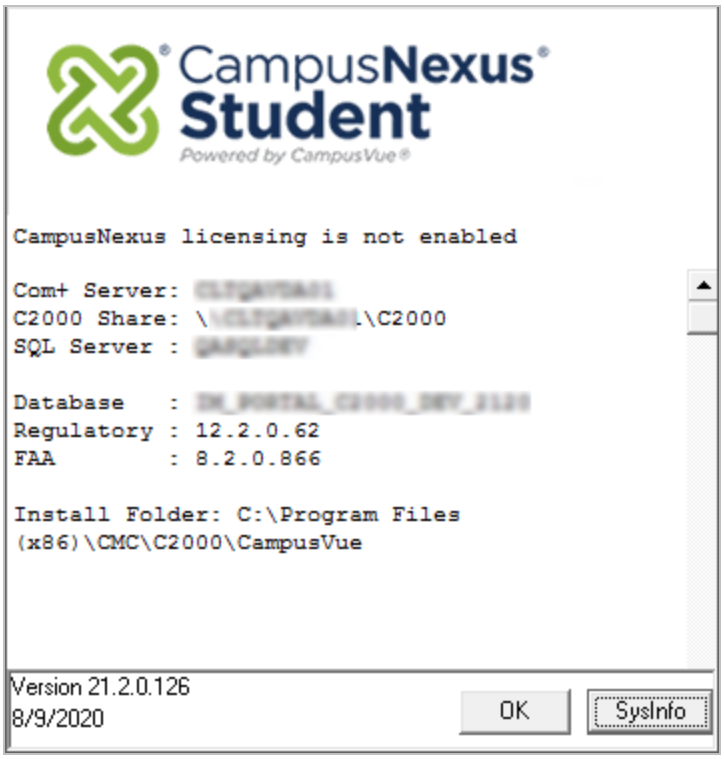
Releases are numbered using the following format: **Major.Minor.Patch.Build**

A **Full Version Name**, for example **CampusNexus Student 16.0.1.0017**, adheres to the following naming conventions:

Full Version Name Example

Version #	Version Type	Description
21	Major	Incremented for releases that contain significant API or architectural changes.
2	Minor	Incremented for releases containing bug fixes and new features.
0	Patch	Incremented for releases containing only bug fixes.
126	Build	Incremented each time the product is compiled by an internal build server.

2. Click **More Info** for information about the *Com+ Server, C2000 Share (drive), SQL Server, Database, Regulatory, FAA* , and *Install Folder* that you are currently using. Anthology Inc. Support may also need to know these details.



3. Click **SysInfo** for information about the names of your *Transaction Server* and *SQL Server*. Select **File** > **Exit** to close the window.
4. Click **OK** to exit the About window.