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Overview

Instructions for setting up MBA Program Fee Waiver.
**Notice about the new version of PeopleSoft**

All page shots used in this guide are from the previous version of PeopleSoft (HCM 8.9). Please be advised that from the fourth week of February 2012, we are using the new version of PeopleSoft (HCM 9.0) and you may experience a difference in the way the new pages look and feel.

In the new version of PeopleSoft (HCM 9.0), the format of how the Main Menu expands has changed, but the actual navigation path and functionality has **not** changed. See the sample page shot.

Other minor changes include the following:

- Improved color scheme
- New look for Processing and Save indicators
- Pop-up Search Window and Edit Boxes
- Number of Search Results Option
- Type Ahead Matching
Set up MBA Program Fee Waiver

Create a New Waiver Item Type

Navigate to Set Up SACR > Product Related > Student Financials > Item Types > Item Types

On the Initial Setup page

1. Use **Effective Date** 01/01/1957.

2. Check **GL Interface Required** box.

3. Use the **Accounting Date Control** equal to Run Date.

4. Check **Waiver** bubble under the **Classification type**.
On the Miscellaneous page

5. Use the **Charge Priority List** equal to **ALL**.
6. Use the **STD code** for the **Payment Overall Priority**.
7. Check **Payment Priority Flag** box.
8. Use the code **10** in the **Priority** box.
9. Check **Pick up Receivable from Charge** box.

On the Account Types page

10. Use the **SetID HW001**.
11. Use the **Account Type CRS** for course fees.

On the GL Interface page

12. Use the **current term code** 2094.
13. Use **Effective Date** 01/01/1957.
14. Create 2 rows under the **Item Type GL Entry Setup - Journal Sets**: 1 for Debit and 1 Credit.
15. Use **Assessment** for **Timing**.
16. Use **100** for **GL Pct** (percent).
17. Get appropriate **Jrnl Set ChartFields** (account, department, project/grant, fund, program, class, etc) from Flo or the Accountants.
18. Save.
Create a New Criteria
Create new criteria to apply to all MBA professional fee scenarios

Navigate to Set Up SACR > Product Related > Student Financials > Tuition and Fees > Criteria

1. Use Effective Date 01/01/1957.
2. Use Criteria Type Trigger Criteria.

3. Use Academic Plan equal to BUADMBA, BUADMS, TAXMS.

4. Add a row and use User Variable Character #5 equal to MBA.
**Create a New Waiver Code**

Navigate to Set Up SACR > Product Related > Student Financials > Tuition and Fees > Waivers

1. Use **Effective Date** 01/01/1957.
2. Use **Account Type CRS** (course fees)
3. Enter the waiver item type.
4. Enter the criteria created for the waiver.
5. Use **Adjust Until Date** 01/01/2500.
6. Use **Waive Percentage equal to 100**.
7. Save.

**Create a New Waiver Group**

Navigate to Set Up SACR > Product Related > Student Financials > Course and Class Fees > Waiver Groups

1. Use **Effective Date** 01/01/1957.
2. Attach the waiver group MBAPROF to each course id that the MBA professional fee is set up for. Flo has the list.

3. Save.

Navigate to Student Financials > Tuition and Fees
> Equation Variables

4. Use the User Variable Character #5 to insert the waiver code MBA on the student account.

5. Save.

View the Student Account

View the Student Account to see the waiver application/credit to the account.

Navigate to Student Financials > View Customer Account

1. Enter
   • Business Unit: HW001
   • ID: 000127903

2. Click on Search.
The Customer Accounts page displays

3. Click on Account Details.

Note: If the waiver does not automatically apply to the account, run tuition calc for the account and then go back to check the student account again.

Navigate to Student Financials > Tuition and Fees > Tuition Calculation

4. Click on Calculate Tuition and Fees.
5. Go back to check the student account again.

Whom to Contact for Help?
For additional help or to report problems with this functionality, please log a ticket via the Service Desk (http://www.csueastbay.edu/servicedesk).