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# Oracle's PeopleSoft 8 SP1 Student Financials

## Changes and Updates to PeopleSoft Student Financials

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November 2006

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Changes and Updates to PeopleSoft Student Financials

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# PeopleSoft 8 SP1 Student Financials Documentation Updates for SA Bundle #16

**Note.** This document is an update to the *PeopleSoft Enterprise 8 SP1 Student Financials PeopleBook*. It describes the Product Update ID #613681 that was posted to Customer Connection in November 2006. Use this document in conjunction with your PeopleBook to maintain a complete set of documentation.

This document discusses changes related to updates and fixes delivered with SA Bundle #16. Specifically, it discusses changes in:

- Defining AP set controls for vendors.
- Defining charge priority list rules.

## See Also

*PeopleSoft Enterprise 8 SP1 Student Financials PeopleBook*, "Setting Up Refunding," Defining AP Set Controls for Vendors

*PeopleSoft Enterprise 8 SP1 Student Financials PeopleBook*, "Completing PeopleSoft Student Financials General Setup," Defining Charge Priority List Rules

## Defining AP Set Controls for Vendors

This section discusses changes related to how to define AP set controls for vendors.

### Page Used to Define AP Set Controls for Vendors

Page Name	Object Name	Navigation	Usage
AP Set Controls - Vendor	SF_AP_VNDR_OPTIONS	Design Student Administration, Define Student Financials, Setup A-H, AP Set Controls - Vendor	Define vendor information.

## Defining AP Set Controls for Vendors

The Student Financials Refund process sends student vendor data to accounts payable as suppliers. Students are exempt from specific tax requirements in some states, and there is no way to separate students from legitimate suppliers.

AP set controls insert information into vouchers produced for refunds using PeopleSoft Payables. Consult with your account payables staff to determine the proper settings.

Access the AP Set Controls - Vendor page.

### AP Set Controls - Vendor

**Vendor Set ID:** SHARE

**AP Set Controls - Vendor**

**Vendor ID Prefix:**

**Last Vendor ID:**

**Vendor Pay Group:**

**AP Address Sequence Number:**

**Vendor Classification:**

### AP Set Controls - Vendor page

The **Vendor Classification** field is added to the page.

**Vendor Classification** Use this field to choose which value to use for the VENDOR\_CLASS in the VENDOR\_SYNC message for the AP Interface process for refunding.

You may select *Attorney*, *Employee*, *HRMS*, or *Supplier*. The default value is *Supplier*.

## Defining Charge Priority List Rules

This section discusses changes related to how to define charge priority list rules.

### Page Used to Define Charge Priority List Rules

Page Name	Object Name	Navigation	Usage
Charge Priority List - Details	ITEM_CHRG_TYP_PRT2	Design Student Administration, Define Student Financials, Setup A-H, Charge Priority List, Details	Define charge priority list rules.

## Defining Charge Priority List Rules

Access the Details page.

Charge Priority List		Details	
<b>SetID:</b>	PSUNV	<b>Charge Priority List:</b>	FINAID
First ◀ 1 of 1 ▶ Last			
<b>Effective Date:</b>	01/01/1900	<b>Status:</b>	Active
<b>Waiver Form:</b>	<input type="text"/> 🔍	<input checked="" type="checkbox"/> <b>Use Aid Year</b>	
View All First ◀ 1 of 2 ▶ Last			
<b>*Allowable Charges:</b>	<input type="text" value="HOUSING"/> 🔍	<b>*Priority:</b>	<input type="text" value="2"/> + -
<b>Current Term:</b>	<input type="text" value="Yes"/> ▼	<b>Amount:</b>	<input type="text"/> USD
<b>Prior Term:</b>	<input type="text" value="No"/> ▼	<b>Amount:</b>	<input type="text"/>
<b>Prior Year:</b>	<input type="text" value="No"/> ▼	<b>Amount:</b>	<input type="text"/>
<b>Future Term:</b>	<input type="text" value="Yes"/> ▼	<b>Amount:</b>	<input type="text"/>

### Details page

The **Use Aid Year** check box is added to the page.

#### Use Aid Year

Select this check box to use the financial aid year for the charge priority list. Clear the check box to apply current functionality and use the academic year.