

Drops, Withdrawals, and Refunds

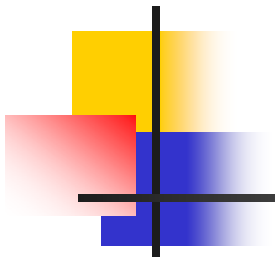


2006 ND HEUG Conference

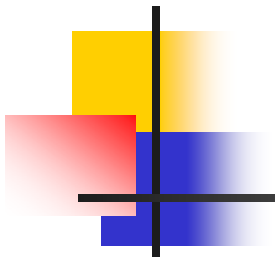
Presented by

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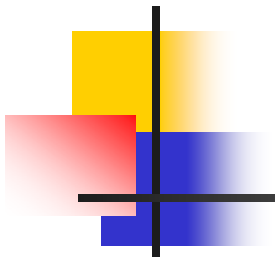
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The Business Office often requests Student Records to reprocess a drop or withdrawal to get the refund calculation to be 'correct' or to provide a petitioned refund. How can these be reprocessed to provide a refund without using backdating?

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- **This can be accomplished for drops by using an “Enrollment Action Reason” for the drop.**
 - **For withdrawals an Adjustment Code found under “Override Withdrawal Schedule” can be used on the Term Withdrawal tab under Term History**

Reprocess drops using an Enrollment Action Reason

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- **Enrollment Action Reasons require set up on both the Student Records side and the Student Financials side**
 - **The first step is on the Student Records side**
 - **Add an Enrollment Action Reason to the Enrollment Action Reason Table**

[Home](#) > [Manage Student Records](#) > [Manage Academic Records](#) > [Setup](#) > Enrollment Action Reason

Choose **Add a New Value**

[Home](#) > [Manage Student Records](#) > [Manage Academic Records](#) > [Setup](#) > **Enrollment Action Reason**

Enrollment Action Reason

Add a New Value

SetID:

Academic Career:

Enrollment Action:

Enrollment Action Reason:

[Find an Existing Value](#)

Note: The code Enrollment Action Reason needs to be added for each Academic Career separately.






Enrollment Action Reason Table

SetID: UND01


Academic Career: Undergraduate

Enrollment Action: Drop

Reason Code: SCOR


Enrollment Action Reason			View All	First	1 of 1	Last
'Effective Date	'Description	Short Description				
01/01/1900 	Retain Drop Until Time Period Swap Correction	'Status				 
	999  Forever	Active 				

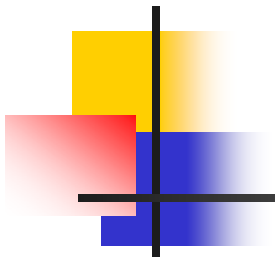
 Save

 Return to Search

 Add

 Update/Display

 Include History

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- **The next step is on the Student Financials side.**
 - **An Adjustment Reason needs to be added to the Adjustment Calendar**

Choose **REFUND1 - Refund Calendar-%Class Length**

Adjustment Calendars

Find an Existing Value

SetID:

Adjustment Code:

Description:

Case Sensitive

[Basic Search](#)

[Add a New Value](#)

Search Results

View All First 1-4 of 4 Last

SetID	Adjustment Code	Description
UND01	100%TERM	100% TERM WITHDRAWL
UND01	COLLABER	Collabertive-Withdrawl
UND01	CORRSPND	Correspondence
UND01	REFUND1	Refund Calendar-%Class Length

Adjustment Calendars

SetID: UND01 Adjustment Code: REFUND1

*Description: Refund Calendar-%Class Length

*Adjustment Option: By Class Length %

View All First ◀ 2 of 5 ▶ Last

*Adjust Reason: DROP Drop Copy Adjustment Calendar + -

Term Withdrawal Set Default

View All First ◀ 1 of 2 ▶ Last

*Term: 0630 2006 Sprng Session: + -

View All First ◀ 1-2 of 2 ▶ Last

Day From	To	Percent From	To	Meeting From	To	Refund Percent		
0	0	0.000	8.999	0	0	100.00	Administrative Fee Setup	+ -
0	0	9.000	100.000	0	0	0.00	Administrative Fee Setup	+ -

Add a row for a new Adjustment Reason. Click on the magnifying glass by the Adjust Reason box. Click on Lookup

A list of Adjust Reasons will be displayed.

Lookup Adjust Reason

SetID: UN001

Adjust Reason:

Description:

[Lookup](#)

[Clear](#)

[Cancel](#)

[Basic Lookup](#)

Search Results

View All First  1-11 of 11  Last

Adjust Reason Description

C0%	Correspondence 0%
C100	Correspondence 100%
C50%	Correspondence 50%
CANC	Class Cancelled
CANC	canceled
DROP	Drop
INST	Instructor Drop
LGPA	Low GPA
PETI	Petitioned Drop
PREQ	Pre-requisite Missing
SCOR	Swap Correction

This list comes from the Enrollment Action Reasons that are set up on the Student Records side.

Adjustment Calendars

SetID: UND01 Adjustment Code: REFUND1

*Description: Refund Calendar-%Class Length

*Adjustment Option: By Class Length %

View All First ◀ 3 of 6 ▶ Last

*Adjust Reason: SCOR 🔍 Swap Correction Copy Adjustment Calendar + -

Term Withdrawal Set Default

View All First ◀ 1 of 1 ▶ Last

*Term: 0630 🔍 2006 Sprng Session: + -

View All First ◀ 1 of 1 ▶ Last

Day From	To	Percent From	To	Meeting From	To	Refund Percent	
0	0	0.000	100.000	0	0	100.0	Administrative Fee Setup + -

Save Return to Search Next in List Previous in List Refresh

+ Add Update/Display

To make the Adjustment Code effective at anytime the Enrollment Action Reason is used make it effective From 0.000 percent To 100.000 percent. Enter the refund percentage preferred for this adjustment code.

Roberta Rabbit Swapped one course for another on 01/23/2006. This was before the last day to add, but after the 100% refund period. Therefore she did not receive a refund for the dropped class and was charged additional for the class that was added.

[Home](#) > [Manage Student Financials](#) > [Calculate Tuition and Fees](#) > [Inquire](#) > **Fees After Calculation**

Fees After Calculation

Class Prices

									View All	First	1 of 6	Last	
									Date Time:	04/06/2006 4:27PM			
									Total:	2,195.00 USD			
									View All	First	1-8 of 8	Last	
Class Nbr	Description	Session	Class Price		Enrollment Add Date	Enrollment Drop Date	Adjustment Code	Adjust Reason	Refund Percent				
5441	Physical Education	Regular	0.00	USD	11/10/2005				0.00				
5622	Field Experience In PEXS	Regular	0.00	USD	12/27/2005				0.00				
7677	Adv Developmental Psychology	Regular	0.00	USD	11/10/2005				0.00				
8093	Colloquium In The Humanities	Regular	365.84	USD	11/15/2005				0.00				
8107	Adv Colloquium In The Sciences	Regular	548.76	USD	11/10/2005				0.00				
8114	Senior Honors Thesis	Regular	914.60	USD	11/14/2005				0.00				
17217	Adv Colloquium In The Humaniti	Regular	182.92	USD	01/23/2006				0.00				
18131	Special Topics In Psychology	Regular	182.88	USD	01/01/2006	01/23/2006	REFUND1	DROP	0.00				

The last day to receive a refund for a dropped class was 01/18/2006. To reprocess this drop and generate a 100% refund with out changing the date the course was dropped we need to reprocess the drop using an Enrollment Action Reason.

Re-enroll the student in the course using the original enrollment add date.

[Home](#) > [Manage Student Records](#) > [Manage Academic Records](#) > [Use](#) > **Enrollment Request**

Enrollment Request

0051866 Rabbit,Roberta



University of North Dakota

Undergraduate

Psychology

2006 Spring

Enrollment Request ID: 0000000000

Status: Pending

[Submit](#)

User ID: aviergutz

[Operator Enrollment Access](#)

Enrollment Request Details

[View All](#) First 1 of 1 Last



Sequence Nbr: 1 Pending

Action:

Action Reason:

Override Action Date

Action Date:

Wait List Okay

Class Nbr: Psychology 299 02 Lecture Special Topics In Psychology

Regular Academic Session Undergraduate

Related Class 1:

Related Class 2:

Drop the course using the Action Reason set up to create a 100% refund and using the original enrollment drop date.

[Home](#) > [Manage Student Records](#) > [Manage Academic Records](#) > [Use](#) > **Enrollment Request**

Enrollment Request

0051866 Rabbit,Roberta



University of North Dakota

Undergraduate

Psychology

2006 Spring

Enrollment Request ID: 0000557697

Status: Pending

Submit

User ID: aviergutz

[Operator Enrollment Access](#)

Enrollment Request Details

[View All](#)

[First](#)



2 of 4



[Last](#)



Sequence Nbr: 4 Pending

Action: Drop

Action Reason: SCOR Swap Correction

Override Action Date

Action Date: 01/23/2006

Wait List Okay

Class Nbr: 18131 Psychology 299 02 Lecture Special Topics In Psychology

Regular Academic Session Undergraduate

Related Class 1:

Related Class 2:

The Business Office needs to Calculate Tuition and Fees.

[Home](#) > [Manage Student Financials](#) > [Calculate Tuition and Fees](#) > [Use](#) > **Tuition Calculation**

Tuition Calculation

Roberta Rabbit

ID: 0051866



[Academic Information](#)

[Display Student's Accounts](#)

View All First ◀ 1 of 1 ▶ Last

Academic Career: Undergraduate

View All First ◀ 3 of 10 ▶ Last

Academic Institution: University of North Dakota

Business Unit: University of North Dakota

Term: 2006 Sprng Semester

Billing Career: Undergraduate

Primary Program: Psychology

Campus: University of North Dakota

Override Billing Units:

Projected Bill Units:

Override Init Enrl Fee:

Override Init Add Fee:

Tuition Residency:

Override Tuition Group: 🔍

Tuition Group: Undergraduate Res

Tuition Calc Required:

Tuition Calc Date Time: 04/06/2006 4:27PM

[Calculate Tuition and Fees](#)

[Display Tuition and Fees](#)

[Display Errors / Warnings](#)

Save

Return to Search

Refresh

View the Fees After Calculation.

[Home](#) > [Manage Student Financials](#) > [Calculate Tuition and Fees](#) > [Inquire](#) > **Fees After Calculation**

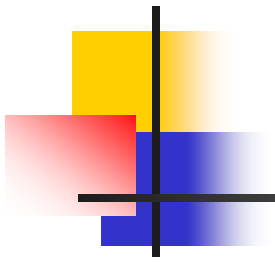
Fees After Calculation

Class Prices

										View All	First	1 of 7	Last	
										Date Time:	04/06/2006 4:57PM			
										Total:	2,012.12 USD			
										View All	First	1-8 of 8	Last	
Class Nbr	Description	Session	Class Price	Enrollment Add Date	Enrollment Drop Date	Adjustment Code	Adjust Reason	Refund Percent						
5441	Physical Education	Regular	0.00 USD	11/10/2005				0.00						
5622	Field Experience In PEXS	Regular	0.00 USD	12/27/2005				0.00						
7677	Adv Developmental Psychology	Regular	0.00 USD	11/10/2005				0.00						
8093	Colloquium In The Humanities	Regular	365.84 USD	11/15/2005				0.00						
8107	Adv Colloquium In The Sciences	Regular	548.76 USD	11/10/2005				0.00						
8114	Senior Honors Thesis	Regular	914.60 USD	11/14/2005				0.00						
17217	Adv Colloquium In The Humaniti	Regular	182.92 USD	01/23/2006				0.00						
18131	Special Topics In Psychology	Regular	0.00 USD	01/01/2006	01/23/2006	REFUND1	SCOR	100.00						

A 100% refund was generated for the drop. The Adjust Reason code of SCOR is shown. The Enrollment Add and Drop Dates are the same as the original Add and Drop, reflecting an accurate record of when the student added and dropped the course.

Reprocess withdrawals using an Override Withdrawal Schedule code

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- **Override Withdrawal Schedule code requires set up on Student Financials side**
 - **Add an Adjustment Calendar for the preferred refund amount.**


[Home](#) > [Manage Student Financials](#) > [Calculate Tuition and Fees](#) > [Setup](#) > Adjustment Calendars.

Click on **Add a New Value**

[Home](#) > [Manage Student Financials](#) > [Calculate Tuition and Fees](#) > [Setup](#) > **Adjustment Calendars**

Adjustment Calendars

Find an Existing Value

SetID: 

Adjustment Code:

Description:

Case Sensitive

[Basic Search](#)

[Add a New Value](#)

Enter a 4 letter Adjustment Code

[Home](#) > [Manage Student Financials](#) > [Calculate Tuition and Fees](#) > [Setup](#) > **Adjustment Calendars**

Adjustment Calendars

Add a New Value

SetID:



Adjustment Code:

[Find an Existing Value](#)

We want an Adjustment Code that will provide a 100% refund for a Special Circumstance withdrawal. Enter an appropriate description. Adjustment Option - By Class Length % . Enter a code for the Adjust Reason. Place a check mark in the box before Term Withdrawal. Enter the Term. To make the Adjustment Calendar effective for the full term enter From 0.000 percent To 100.000 percent. Enter the preferred Refund Percent.

[Home](#) > [Manage Student Financials](#) > [Calculate Tuition and Fees](#) > [Setup](#) > **Adjustment Calendars**

Adjustment Calendars

SetID: Adjustment Code:

*Description:

*Adjustment Option:

View All First 1 of 1 Last

*Adjust Reason:

Copy Adjustment Calendar

Term Withdrawal

Set Default

View All First 1 of 1 Last

*Term: 2006 Sprng

Session:

Set Default

View All First 1 of 1 Last

Day From	To	Percent From	To	Meeting From	To	Refund Percent	
0	0	<input type="text" value="0.000"/>	<input type="text" value="100.000"/>	0	0	<input type="text" value="100.00"/>	Administrative Fee Setup <input type="button" value="+"/> <input type="button" value="-"/>

Click on the magnifying glass after Override Withdrawal Schedule: Click on Lookup. A list of the Adjustment Codes that have been setup for withdrawals will be displayed.

Lookup Override Withdrawal Schedule

SetID: UND01

Adjustment Code:

Description:

Lookup

Clear

Cancel

[Basic Lookup](#)

Search Results

View All

First ◀ 1-4 of 4 ▶ Last

Adjustment Code Description

100%TERM	100% TERM WITHDRAWL
COLLABER	Collabertive-Withdrawl
REFUND1	Refund Calendar-%Class Length
SPEC	Special Circumstance 100%

Choose the appropriate Adjustment Code.




◀ Term Withdrawal Session Withdrawal Academic Standing Student Grade Review Student Special GPA

Donald Duck ID: 0596731

View All First ◀ 1 of 1 ▶ Last

Academic Career: Undergraduate

View All First ◀ 3 of 6 ▶ Last

Academic Institution: University of North Dakota   


Term: 2006 Spring [Success](#)


Academic Level - Term Start: Sophomore


Pro-Rata Eligible: [Post Term Withdrawal](#)






***Withdrawal \ Cancel:** ▼

Withdrawal \ Cancel Reason: ▼

Withdrawal \ Cancel Date: 

Last Date of Attendance: 

Override Withdrawal Schedule: 

 Save  Return to Search  Update/Display  Include History  Correct History

[Term Statistics](#) | [Cumulative Statistics](#) | [Term Withdrawal](#) | [Session Withdrawal](#) | [Academic Standing](#) | [Student Grade Review](#) | [Student Special GPA](#)

Click on Save.

The Business Office needs to Calculate Tuition and Fees

[Home](#) > [Manage Student Financials](#) > [Calculate Tuition and Fees](#) > [Use](#) > **Tuition Calculation**

Tuition Calculation

Donald Duck

ID: 0596731

[Academic Information](#)

[Display Student's Accounts](#)

View All First ◀ 1 of 1 ▶ Last

Academic Career: Undergraduate

View All First ◀ 3 of 6 ▶ Last

Academic Institution: University of North Dakota

Business Unit: University of North Dakota

Term: 2006 Sprng Semester

Billing Career: Undergraduate

Primary Program: Financial Management

Campus: University of North Dakota

Override Billing Units:

Projected Bill Units:

Override Init Enrl Fee:

Override Init Add Fee:

Tuition Residency:

Override Tuition Group: 🔍

Tuition Group: Undergraduate Res

Tuition Calc Required:

Tuition Calc Date Time: 04/07/2006 2:20PM

[Calculate Tuition and Fees](#)

[Display Tuition and Fees](#)

[Display Errors / Warnings](#)

[Save](#)

[Return to Search](#)

[Refresh](#)

A check may not appear after Tuition Calc Required, but you can still choose Calculate Tuition and Fees.

View the Fees After Calculation.

[Home](#) > [Manage Student Financials](#) > [Calculate Tuition and Fees](#) > [Inquire](#) > **Fees After Calculation**

Fees After Calculation

Class Prices

									View All	First	2 of 4	Last
									Date Time:	04/07/2006 2:19PM		
									Total:	0.00 USD		
									View All	First	1-4 of 4	Last
Class Nbr	Description	Session	Class Price	Enrollment Add Date	Enrollment Drop Date	Adjustment Code	Adjust Reason	Refund Percent				
4278	Western Civilization II	Regular	0.00 USD	01/13/2006	03/30/2006			0.00				
4530	Principles Of Macroeconomics	Regular	0.00 USD	01/13/2006	03/30/2006			0.00				
4777	Technical And Business Writing	Regular	0.00 USD	12/22/2005	03/30/2006			0.00				
7342	Introduction To Space Studies	Regular	0.00 USD	12/22/2005	03/30/2006			0.00				

[Return](#)

A 100% refund was generated for the withdrawal as the amount shown for the class price is 0.00. The Enrollment Add and Drop Dates are the same as the original Add and Drop, reflecting an accurate record of when the student enrolled and withdrew from courses.



Questions?