Drops, Withdrawals, and Refunds

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Presented by

Janet Reisenauer
Dickenson State University
Janet.Reisenauer@dsu.nodak.edu

Annette Viergutz
University of North Dakota
annetteviergutz@mail.und.edu
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?
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

- 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
Choose **Add a New Value**

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**SetID:** UND01

**Academic Career:** Undergraduate

**Enrollment Action:**

**Enrollment Action Reason:** SCOR

**Add**

**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

<table>
<thead>
<tr>
<th>Effective Date</th>
<th>Description Retain Drop Until Time Period</th>
<th>Short Description Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/01/1900</td>
<td>Swap Correction</td>
<td>S Correct</td>
</tr>
<tr>
<td></td>
<td>999 Forever</td>
<td>Active</td>
</tr>
</tbody>
</table>
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: UND01
Adjustment Code:
Description:

Search Clear 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 Collaborative-Withdrawl
UND01 CORRSPND Correspondence
UND01 REFUND1 Refund Calendar-%Class Length
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: UND01
Adjust Reason: 
Description: 

[Lookup] [Clear] [Cancel] [Basic Lookup]

**Search Results**

View All  First  1-11 of 11  Last

<table>
<thead>
<tr>
<th>Adjust Reason Description</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>C0%</td>
<td>Correspondence 0%</td>
</tr>
<tr>
<td>C100</td>
<td>Correspondence 100%</td>
</tr>
<tr>
<td>C50%</td>
<td>Correspondence 50%</td>
</tr>
<tr>
<td>CANC</td>
<td>Class Cancelled</td>
</tr>
<tr>
<td>CANC</td>
<td>canceled</td>
</tr>
<tr>
<td>DROP</td>
<td>Drop</td>
</tr>
<tr>
<td>INST</td>
<td>Instructor Drop</td>
</tr>
<tr>
<td>LGPA</td>
<td>Low GPA</td>
</tr>
<tr>
<td>PETI</td>
<td>Petitioned Drop</td>
</tr>
<tr>
<td>PREQ</td>
<td>Pre-requisite Missing</td>
</tr>
<tr>
<td>SCOR</td>
<td>Swap Correction</td>
</tr>
</tbody>
</table>

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

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.
Drop the course using the Action Reason set up to create a 100% refund and using the original enrollment drop date.
The Business Office needs to Calculate Tuition and Fees.

### Tuition Calculation

**Robert Rabbit**

**ID:** 0051866

**Academic Information**

<table>
<thead>
<tr>
<th>Academic Career:</th>
<th>Undergraduate</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Academic Institution:</th>
<th>University of North Dakota</th>
</tr>
</thead>
<tbody>
<tr>
<td>Term:</td>
<td>2006 Sprng Semester</td>
</tr>
<tr>
<td>Primary Program:</td>
<td>Psychology</td>
</tr>
<tr>
<td>Override Billing Units:</td>
<td>□</td>
</tr>
<tr>
<td>Override Init Enrl Fee:</td>
<td>□</td>
</tr>
<tr>
<td>Tuition Residency:</td>
<td>0.000</td>
</tr>
<tr>
<td>Override Tuition Group:</td>
<td>□</td>
</tr>
<tr>
<td>Tuition Calc Required:</td>
<td>✔</td>
</tr>
</tbody>
</table>

**Calculate Tuition and Fees**

**Business Unit:** University of North Dakota

**Billing Career:** Undergraduate

**Campus:** University of North Dakota

**Projected Bill Units:** □

**Override Init Add Fee:** □

**Tuition Group:** Undergraduate Res

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

**Display Tuition and Fees**

**Display Errors / Warnings**

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[Image of Tuition Calculation webpage]
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

- Override Withdrawal Schedule code requires set up on Student Financials side

- Add an Adjustment Calendar for the preferred refund amount.
Click on **Add a New Value**
Enter a 4 letter Adjustment Code

Add a New Value

SetID: UNDO1
Adjustment Code: SPEC

Add

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.
Donald Duck withdrew from the Spring 2006 Semester on 03/31/06. The refund % was 0%. He petitioned the Dean of Students for a 100% refund due to Medical Circumstances. The Dean of Students has approved the petition and requested that Donald Duck be given a 100% refund.

Home > Manage Student Records > Manage Academic Records > Use > Term History.

Click on the Term Withdrawal tab. Use the arrows to navigate to the approprioted term.
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.
Choose the appropriate Adjustment Code.

Click on Save.
The Business Office needs to Calculate Tuition and Fees

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