

PeopleSoft Campus Solutions 9.2 Update Image Overview

PeopleSoft Campus Solutions 9.2 Update Image 16–17

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Preface

This document provides an overview of the new features and enhancements delivered in PeopleSoft Campus Solutions (CS) 9.2 Update Images 16–17.

You can find the additional information referenced for each feature by copying and pasting the topic name into the Search bar of the PeopleSoft Campus Solutions Online Help website. Also, see [Understanding the PeopleSoft Online Help and PeopleBooks](#) for ways to access product documentation. Information about all PeopleSoft products is found at www.peoplesoftinfo.com.

This document will be updated with new features and enhancements delivered in CS Update Images throughout 2020. Note that Update Images are cumulative and therefore, the latest Update Image reference in this document contains all fixes, regulatory updates and enhancements delivered since PeopleSoft CS 9.2 was made generally available in December 2015. See the PeopleSoft 9.2: Campus Solutions Update Image Documentation on My Oracle Support (Doc ID 2117001.2) for comprehensive documentation.

The information included in this document is intended to help you understand the business benefits of the additional capabilities Oracle developed in the delivered update images and to help you plan your information technology (IT) projects and investments.

Introduction

As part of its Applications Unlimited Program, Oracle continues to invest in PeopleSoft applications on an ongoing basis, including frequent delivery of new functionality on its 9.2 release. Customers can selectively adopt new features and enhancements using the PeopleSoft Update Manager.

In general, no additional software license fees are associated with Update Images and capabilities delivered. The main exception to this is when new applications are introduced. New applications can require a separate license.

PeopleSoft Update Images have no effect on Oracle support policies. A detailed listing of support periods for each PeopleSoft product family and release is included in the Lifetime Support Policy, which is available on Oracle.com (<http://www.oracle.com/us/support/lifetime-support/index.html>).

Oracle PeopleSoft continues to deliver new and enhanced functionality designed to help drive organizational effectiveness, provide decision support tools to facilitate intelligent business execution and offer customers more flexibility through the use of additional configuration options, integrations, and new tools capabilities.

Campus Solutions 9.2 represents a significant stage in the product's evolution. This release allows Campus Solutions to align with important strategic initiatives that PeopleSoft delivers and plans to deliver. Customers can take advantage of innovative lifecycle management tools provided by selective adoption and a number of other PeopleTools innovations including the PeopleSoft Fluid User Interface. PeopleSoft Campus Solutions plans to utilize this innovative technology to design and deliver navigation and transactions optimized for multiple device form factors.

Campus Solutions also delivers regulatory updates, enhancements, and support development to customers in CS 9.2 Update Images.

This document describes functionality that has been delivered in the following areas:

- Functionality Across Applications
- Campus Community
- Financial Aid
- Recruiting and Admissions

- Student Financials
- Student Records and Academic Advising

PeopleSoft Campus Solutions 9.2 Update Image 16

Campus Solutions 9.2 Image 16 delivered these features and enhancements.

Functionality Across Applications

This section describes delivered new functionality or enhancements that apply to more than one application.

Integration to Vocado Student Financial Planning Cloud Service

Vocado Student Financial Planning (SFP) Cloud Service provides a leading student-centric, cloud-based financial aid solution for higher education institutions. SFP works with thousands of financial aid sources to optimize funding for any type of higher education learning model. The SFP solution helps students identify eligibility and obtain financing so they can achieve their academic goals.

Campus Solutions customers can opt to integrate with SFP as an alternative to using Campus Solutions Financial Aid. Phase 1 of the CS/SFP Integration was introduced in Update Image 11.

Updates for Image 16 include:

- A new message class in the SFP Message Log to identify validation errors.
- SFP Message log provides XML data for message classes: STIN, STUP, and STLA.
- An option to specify whether Anticipated Aid is available before disbursement, and the number of days through which the aid is expected to remain active.

For information, see:

- "Setting Up Integration with Oracle Student Financial Planning Cloud Service" in Integrating with Oracle Student Financial Planning Cloud Service (PeopleSoft Campus Solutions 9.2: Campus Community).
- "Exchanging Data with Oracle Student Financial Planning Cloud Service" in "Integrating with Oracle Student Financial Planning Cloud Service" (PeopleSoft Campus Solutions 9.2: Campus Community).
- "Setting Up Item Types and Item Type Groups" in Completing Student Financials General Setup (PeopleSoft Campus Solutions 9.2: Student Financials).

Campus Community

This section describes delivered new functionality or enhancements that apply to Campus Community.

SEVIS Updates

Various updates to handle the required city of birth value and the change to the gender code:

- New field on the I-20 Form, Student Information region: Birth Location

- For the SEVIS Alerts Process for F/M Visas, these events are updated:
 - Create Student, Dependent – Add
 - An error is reported if BIRTHPLACE is blank for the student or dependent.
 - The processing that populates Gender in the alerts records is updated to convert any non-standard gender (values that aren't M, F, or U) in the most recent person biographical history record to 'U' for reporting to SEVIS.
 - Dependent – Edit, Personal Info
 - New logic is added that triggers an event when the Birth Location value is different between the person record and SEVIS master record.
 - The processing that compares gender in the most recent person biographical history record with the value in Master Dependents is updated to convert values other than M, F, or U to 'U' before comparing with the existing value in the master record.
- For the SEVIS Alerts Process for J Visas:
 - The existing processing that populates Gender in the alerts records (SEX in SEV_REV_BIO and SEV_REV_DEP) is updated to convert any non-standard Gender values (that is, any value other than M, F, or U) in the most recent person biographical history record to 'U' for reporting to SEVIS for both students and dependents.
 - CreateEV – for exchange visitors and any dependents
 - Dependent – Add – for the dependent
 - The processing that compares the Gender value from the most recent person biographical history record with the value held in Master – Bio and Master – Dependents is updated to convert values other than M, F, or U to U before the value is compared with the existing value in master.
 - Biographical – for the exchange visitor
 - Dependent – Edit – for the dependent
 - The existing validation for Unknown and other invalid values becomes obsolete and is removed.
- On the Alerts Header page, the Compare Detail — Personal and Compare Detail — Dependent Edit pages are updated to display differences in Birth Location.
- On the Errors page, messages are added to Message Set 14010:
 - #407: Birth Location is required.
 - #408: Dependent Birth Location is required.
 Birth Location errors are displayed in the same way as existing errors.
- For the SEVIS Export process:
 - As part of the existing processing, BIRTHPLACE from the alert is already being populated in the new inactive rows added to SEVIS Master:
 - CreateStudent – SEV_MST_BIO from SEV_REV_BIO
 - Dependent – Add - SEV_MST_DEP from SEV_REV_DEP
 - Dependent – Edit - SEV_MST_DEP from SEV_REV_DEP
 - PersonalInfo - SEV_MST_BIO from SEV_REV_BIO
 - The XML creation process is updated to include BirthCity from the alerts record.
- For the Import process:
 - For successful add events (for example, Create Student, Dependent – Add), the Import Process updates the inactive master rows to active.

- For successful update events (for example, Dependent – Edit, PersonalInfo), the Import Process copies selected values from the inactive to active row before deleting the inactive row, but this doesn't currently include BIRTHPLACE for PersonalInfo. For Dependent – Edit, BIRTHPLACE is currently copied from the inactive to active row.
The processing for PersonalInfo is updated to copy BIRTHPLACE to the active row.
- The Dependent — Reactivate processing is updated to copy these values from the inactive to active row in SEV_MST_DEP before the inactive row is deleted:
 - Effective Date
 - Extract Batch ID
 - Request ID
 - Relationship Status
 - Termination Reason
 - By
 - Last Update Date/Time

For information, see (USA) Managing PeopleSoft SEVIS Solution Visa Processing for J and F/M Visas (PeopleSoft Campus Solutions 9.2: Campus Community).

Financial Aid

This section describes delivered new functionality or enhancements that apply to Financial Aid.

College Financing Plan (CFP) Updates

College Financing Plan is formerly known as Shopping Sheet.


- All instances of Shopping Sheet in the navigation have been updated to College Financing Plan.
- EFC Option includes option to display both FM and IM EFCs.
- The Institutional Metrics information has been removed for AY 2021 and later.
- Ability to map housing budget items as being on or off campus.
- Display loan interest rates and work study hours per week.

For information, see "Setting Up and Accessing a College Financing Plan" in Notifying Students of Financial Aid Awards (PeopleSoft Campus Solutions 9.2: Financial Aid).

INAS Update

INAS Technical Release 2021.1 was made available by the College Board to address issues encountered with the IBM COBOL compiler.

INAS Technical Release 2021.3 was made available by the College Board. There was a change to the base IM behavior for students and option behavior for parents for the 2020-2021 year that allows income exclusions to exceed income. However, it was not the intent to allow negative total income amounts to continue through the calculation. This release corrects for this and sets negative total income to zero in these scenarios. The College Board recommends that schools run need analysis on CSS Profiles received prior to October 5, 2019 to ensure their calculations are correct.



Although the College Board is not seeing large numbers of these cases in CSS Profile processing, an incorrect total income does impact many areas of the calculation.

NOTE: There is an INAS Technical Release 2021.2 from The College Board, however that update is for hosted web services and does NOT apply to Campus Solutions customers.

Move 2017-2018 Aid Year Financial Aid Components to History

In compliance with Oracle/PeopleSoft policy of supporting three active aid years, the following 2017-2018 components were moved to Financial Aid History:

- INAS
- PROFILE
- ISIR
- Verification

Student Financials

This section describes delivered new functionality or enhancements that apply to Student Financials.

CAN T2202 Updates

- All fields and menus that reference T2202A have been updated to T2202.
- New pages:
 - T2202 Setup, to define institution-level attributes.
 - Manage T2202 XML, to generate the T2202 XML file, or reset records that were previously picked up by the process.
 - T2202 XML Audit, to validate T2202 CRA XML files by converting XML data into a readable format.
 - Create T2202 PDF Forms, to create PDF files of T2202 forms for students.
- The Generate T2202 process is updated to:
 - Update students' social insurance number (SIN) on the T2202_HDR record.
 - Use the name and address usage configurations from the T2202 Setup page to select appropriately defined name and address records for the student.
 - Not update T2202 program, tuition, or enrollment data that are manually overridden on the Edit T2202 Data page on subsequent runs of the Generate T2202 process.
 - Set a Slip Type value of "Original" for all T2202 records that are created.
 - Not regenerate data for a user once an original is picked up by the CRA XML file process. Cancel and Amendment slips must be manually updated through the Edit T2202 Data page.
- The T2202 Data page is updated to help you manage the data you send to CRA.

For information, see "Producing T2202 Tax Forms" in Producing Tax Forms and Receipt Information (PeopleSoft Campus Solutions 9.2: Student Financials).

(AUS) HELP Loan Update

From January 1, 2020, the HECS HELP Loan amounts are combined with FEE HELP amounts to form the students' combined HELP balance and usage. The HELP loan limit includes HECS-HELP, FEE-HELP, VET FEE-HELP and VET Students Loans.

- On the Regional page for Australia, these are the new fields:
 - TFN Certificate of Application
 - TFN Certificate Issue Date
 - Comment
- On the FEE HELP page, the FEE-HELP Limit is no longer used after January 1, 2020.
- The HECS Reconciliation and FEE HELP Determination processes are updated. From January 1, 2020:
 - The process checks whether the TFN is blank, and if it is, then:
 - It checks if the TFN Certificate of Application check box is selected. If the check box isn't selected, the student is skipped.
 - The process defers charges only when the TFN Certificate of Application check box is selected and the TFN Certificate Issue Date is on or before the census date. Otherwise, a log is recorded.
 - The combined HELP loan limit is used. This limit includes HECS-HELP, FEE-HELP, VET FEEHELP, and VET Student Loans.
 - The process looks at the CHESSN Data page to determine whether there is enough balance in the HELP LOAN Entitlement to defer charges. Partial deferrals are made when there is less than the full amount covered by the balance.
- The SA-HELP Deferral process is updated to check whether the student has a CHESSN and TFN. If the TFN is blank, the process defers charges only when the TFN Certificate of Application check box is selected and the TFN Certificate Issue Date is on or before the census date. Otherwise, a log is recorded.
- New region on the CHESSN page: HELP LOAN Entitlement. This replaces FEE-HELP entitlement from January 1, 2020.

For information, see:

- "Adding or Updating Biographical Details Data" in Adding a Person to Your Campus Solutions Database (PeopleSoft Campus Solutions 9.2: Campus Community)
- (AUS) Setting Up and Using Australian Loan Processing (PeopleSoft Campus Solutions 9.2: Student Financials)
- "Storing CHESSN Data" in (AUS) Managing CHESSN Data Storage (PeopleSoft Campus Solutions 9.2: Campus Community)

Student Records and Academic Advising

This section describes delivered new functionality or enhancements that apply to Student Records.

Activity Management Update

- New fields on the Result Scale Table page:
 - Apply to Course Mark Only, which allows you to set the rounding or truncating of calculated marks to apply only at the course level. By default, this option is not selected.
 - Mandatory Pass Result Scale. When you select this option, you're setting the scale to be used for mandatory pass calculation. By default, this option is not selected.

- Mandatory Pass Calculation Options. This group box appears when you don't select Mandatory Pass Result Scale. This lists options you can use to define how you want to calculate mandatory fails.

For information, see "Setting Up an Activity Management Framework, Defining a Result Scale" in Setting Up Activity Management (PeopleSoft Campus Solutions 9.2: Student Records).

Activity IDs in the WorkCentre

In the Activity Management WorkCenter, the Activity ID appears on the following pages: Summary Page (Activity Manager), Activity Roster, and Result Roster.

There are no documentation updates related to this.

BRON Updates

Objects are delivered for the project related to BRON interface, VOBO, RIO, and AMVB certificates.

There are no documentation updates related to this.

TCSI Updates Phase 1

TCSI combines the data from HEIMS Student Data Collection and CentreLink CART, and reports the data once a week using an API.

- New pages to set up DIISRTE reporting codes:
 - Campus Location page to identify CS locations that should be considered a campus for TCSI and identify the provider type.
 - Disability Mapping page to map types of impairment with E615 disability codes.
 - E599 Completion Code Mapping page to map program actions and action reasons to E599 program completion codes.
- New fields on the Regional page for Australia:
 - TFN Certificate of Application
 - TFN Certificate Issue Date
 - Comment
- New region on the Commonwealth Scholarship page: Scholarship Amounts
- New page to generate student data files: HEIMS Program on Campus
- New fields on Acad Prog AUS page: Program of Study Name E394, Standard Program Duration E596
- Updates to fields on Acad Plan AUS page: HEIMS Plan, Program Name E308, Standard Program Duration E596
- New page to define Australia-specific academic career attributes: Academic Career AUS page
- New field on Student Data AUS page: Level Left School E612
- Updated Application Regional page to capture this information: Highest Attainment E620, ATAR E632, Selection Rank E605, VET Study Reason Code E575, VET Labour Force Status Code E576, VET Course Assurance Indicator E619.
- Updated AUS Student Program page:
 - Added fields: Primary Field of Research Code E594, Secondary Field of Research Code E595, HDR End User Engagement Codes, Research Scholarships
 - Renamed Research Comm Date to HDR Commencement Data E534
 - Updated field name: Thesis Submission Date E591
 - Renamed Research Completion Date to HDR Research Completion Date E592

- Removed these fields from the Class Components page: Work Experience Indicator, Summer and Winter School Code, Year Long Indicator E622, Exclude from HEIMS Reporting

For information, see:

- "Setting Up DIISRTE Reporting Codes" in (AUS) Setting Up Government Reporting (PeopleSoft Campus Solutions 9.2: Student Records)
- "Recording a Commonwealth Scholarship" in (AUS) Generating Government Reports (PeopleSoft Campus Solutions 9.2: Student Records)
- "Generating the Student Data Files that Allow Revision" in (AUS) Generating Government Reports (PeopleSoft Campus Solutions 9.2: Student Records)
- "Defining Academic Programs," "Defining Academic Plans," in Defining Programs, Plans, and Subplans (PeopleSoft Campus Solutions 9.2: Application Fundamentals)
- "Defining Academic Careers" in Designing Your Academic Structure (PeopleSoft Campus Solutions 9.2: Application Fundamentals)
- "Managing Personal Attributes Information" in Managing Biographical Information (PeopleSoft Campus Solutions 9.2: Campus Community)
- "Maintaining Student Program Stacks" in Managing Student Programs, Plans, and Subplans (PeopleSoft Campus Solutions 9.2: Student Records)
- "Defining Class Associations" in Managing the Schedule of Classes (PeopleSoft Campus Solutions 9.2: Student Records)
- "Adding or Updating Biographical Details Data" in Adding a Person to Your Campus Solutions Database (PeopleSoft Campus Solutions 9.2: Campus Community)

PeopleSoft Campus Solutions 9.2 Update Image 17

Campus Solutions 9.2 Image 17 delivered these features and enhancements.

Functionality Across Applications

This section describes delivered new functionality or enhancements that apply to more than one application.


General Enhancements

- Enhanced the Page and Field Configurator to support data masking, additively apply sequences, and multi-select of page fields.
- Added the Questionnaire Framework to provide users with the ability to create configurable surveys and questionnaires. The questionnaire setup is delivered as an activity guide template to walk users through the creation steps easily. Currently, the questionnaire can be added as an activity guide step in the Activity Guide Composer.

For information, see PeopleSoft Enterprise Components, Questionnaire Framework.

Integration to Vocado Student Financial Planning Cloud Service

Vocado Student Financial Planning (SFP) Cloud Service provides a leading student-centric, cloud-based financial aid solution for higher education institutions. SFP works with thousands of financial aid sources to optimize funding for any type of higher education learning model. The SFP solution helps students identify eligibility and obtain financing so they can achieve their academic goals.



Campus Solutions customers can opt to integrate with SFP as an alternative to using Campus Solutions Financial Aid. Phase 1 of the CS/SFP Integration was introduced in Update Image 11.

Updates for Image 17 include:

- Added CS email notification support to include ISIR comment codes where `<StudentFollowUp>true</StudentFollowUp>` for SFP's `FasValidIsirProcessStatusInformationEvent` message.
- Created a new process to send student group data from Campus Solutions to Student Financial Planning using the `<FasStudentGroupsEvent>` message.
- Created an Expire Anticipated Aid by Student page dedicated to the CS and Oracle Vocado SFP integration.
- Updated PeopleBooks for defining Charge Priority List rules if the financial aid year is used for the charge priority list.
- Updated PeopleBooks for SFP Group Controls if the financial aid year is used for the charge priority list.

For information, see:

- *Integrating with Oracle Student Financial Planning Cloud Service* (PeopleSoft Campus Solutions 9.2: Campus Community)
 - Understanding Integration with Oracle Student Financial Planning Cloud Service
 - Setting Up Integration with Oracle Student Financial Planning Cloud Service
 - Exchanging Data with Oracle Student Financial Planning Cloud Service
- "Setting Up Payment Application Rules" in *Completing Student Financials General Setup* (PeopleSoft Campus Solutions 9.2: Student Financials)

Campus Community

This section describes delivered new functionality or enhancements that apply to Campus Community.

Common Attribute Framework (CAF) Update

The Population Update process is extended to allow you to update attributes for the common attribute framework (CAF) as well as selected fields in the parent record.

You can use the Population Update process to update these records that have CAF record contexts:

- ADM_APPL_DATA – Admission Application Data
- ADM_PRSPCT_CAR – Admission Prospect Career
- RESIDENCY_OFF – Official Residency Data
- STDNT_AWARDS – Student Awards
- STDNT_PKG_VAR – Student Packaging Variables

For information, see:

- "Securing and Setting Up the Population Update Process, Setting Up the Population Update Process" in *Securing Campus Community* (PeopleSoft Campus Solutions 9.2: Application Fundamentals)
- "Running the Population Update Process, Selecting the Update Parameters" in *Using the Population Selection Process* (PeopleSoft Campus Solutions 9.2: Campus Community)

CIP Code Updates

Added and updated CIP codes for the 2020 changes. New codes are added with an effective date of 01-Apr-2020. New rows are added for codes that have been removed with the Valid SEVIS CIP Code flag set to *No*.

For information, see "Setting Up Statistic Period Types, Defining Statistics Period Types" in *Preparing to Consolidate and Report Academic Statistics* (PeopleSoft Campus Solutions 9.2: Student Records).

National ID Update

Added an option to mask the National ID of a person.

For information, see "Defining National ID Types" in *Designing Campus Community* (PeopleSoft Campus Solutions 9.2: Campus Community).

Financial Aid

This section describes delivered new functionality or enhancements that apply to Financial Aid.

(USA) 2020-2021 Common Origination Disbursements (COD) Updates for Direct Loan (DL) and Pell Grant Updates for Pell and Direct Loan (DL) Common Origination and Disbursement (COD):

- Ability to process and transmit Direct Loan origination, change, and disbursement information to COD.
- New 4.0d schema in place starting award year 2020-2021.
- Included CIP Code Year with SULA and GEPL-related tags in files sent to COD.
- Informed Borrowing tags are now included in direct loan response files from COD.
- Ability to import the new Informed Borrowing message class into CS.

For information, see PeopleSoft Campus Solutions 9.2: Financial Aid:

- *Setting Up Your Financial Aid Awarding Cycle*
 - Establishing Defaults, Defining Installation Level Defaults
- *Processing Direct Loans*
 - Processing and Reviewing Direct Lending Origination Information, Processing and Reviewing Miscellaneous Borrower Data
 - Processing and Reviewing Direct Lending Origination Information, Processing and Reviewing Financial Data
 - Processing and Reviewing Direct Lending Origination Information, Overriding Informed Borrower Information
- *Using Common Origination and Disbursement*
 - Reviewing COD Data, Viewing a Student's Award Information
 - Using Common Origination Message Classes

INAS Update

The College Board provided this INAS Technical Update to correct the issue where users see that home equity is calculated when no home has been reported. This happens when there is no reported home data in the student record and users have selected to both project the home value (Choices 2 or 5 for Global option I-16) and impute assets (Global option I-17), an invalid value is carried into the home value portion of the IM calculation. In addition, this release contains code modifications to address the FM production issue where Global option F-1 is calculating Federal parent/student taxes even if the reported tax is blank.

No documentation related to this update.

Student Records

Documentation-Only Update about Search Using Fluid

Updated instructions on scheduling an incremental build for search in Fluid user interface.

For information, see "Building Indexes for Class and Course Search, Scheduling an Incremental Build" in *Setting Up Search in PeopleSoft Fluid User Interface* (PeopleSoft Campus Solutions 9.2: Self Service).



TCSI Data Capture Update

TCSI combines the data from HEIMS Student Data Collection and CentreLink CART and reports the data once a week using an API.





Updates to various pages to capture data for TCSI.

For information, see:

- "Generating the Student Data Files that Allow Revision, Reporting Courses on Campus" in *(AUS) Generating Government Reports* (PeopleSoft Campus Solutions 9.2: Student Records).
- "Creating Course Offerings, Defining Course Offerings" in *Setting Up the Course Catalog* (PeopleSoft Campus Solutions 9.2: Student Records).
- "Defining Academic Programs, (AUS) Setting Up Australian Academic Programs" in *Defining Programs, Plans, and Subplans* (PeopleSoft Campus Solutions 9.2: Application Fundamentals).
- "Maintaining Student Program Stacks, (AUS) Entering Australia-Specific Student Program Information" in *Managing Student Programs, Plans, and Subplans* (PeopleSoft Campus Solutions 9.2: Student Records).



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Hardware and Software, Engineered to Work Together

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