# Maintaining Student Career Term Records

## Prerequisites for Maintaining Student Career Term Records

Before you can use all of the elements in the Term Activation component, you must:

- Activate the student in an academic program.
- Set up default enrollment limits on the Term Enrollment Limits page of the Academic Program Table component.
- Define term control date default values on the academic calendar.

## Using the Term Activation Component

Bundle 49. Documentation-only changes for HEIMS updates of Bundle 48. A new field Research End-User Codes (E593) is added to the AUS Student Program page.

This section discusses how to:

- Maintain a student's career term record.
- Maintain a student's term enrollment limits.
- Maintain a student's session data.
- Maintain a student's terms in residence.
- Maintain a student's term control dates.
- Track and maintain a student's external study agreements.
- (AUS) Set student term default values.
- (NZL) Maintain single data return (SDR) reporting data for a student.

### Pages Used to Maintain Student Career Term Records

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Term Activation | STDNT_ACTIVATION | Records and Enrollment > Student Term Information > Term Activate a Student > Term Activation | Maintain a student's career term record or activate a student into a term. |

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| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Loan Election | SSR_LOAN_ELEC_AUS | Records and Enrollment > Student Term Information > Term Activate a Student > Loan Election | **Note:** This page is for Australian institutions only. To activate the page, select the Australia DEST, HECS, Centrelink, TAC check box on the Academic Institution 6 page.<br><br>Set default values for the student's career number and liability status for course enrollments. |
| SDR (single data return) | SSR_STD_CRTRM_NZL | Records and Enrollment > Student Term Information > Term Activate a Student > SDR | **Note:** This page is for New Zealand institutions only. To activate the page, select the New Zealand Catalog, SDR, EFTS, StudyLink check box on the Academic Institution 6 page.<br><br>Enter fee information for the student's program for SDR reporting. |
| Enrollment Limit | STDNT_ENRL_LIM | Records and Enrollment > Student Term Information > Term Activate a Student > Enrollment Limit | Maintain a student's term enrollment limits. |
| Student Session | STDNT_SESSION | Records and Enrollment > Student Term Information > Term Activate a Student > Student Session | Maintain a student's session data within the student's career term record. |
| Terms In Residence | STDNT_CAREER_RES | Records and Enrollment > Student Term Information > Term Activate a Student > Terms In Residence | Maintain a student's terms in residence or adjust a student's transfer credit values. |
| Term Control Dates | STDNT_TERMCNTRL_DT | Records and Enrollment > Student Term Information > Term Activate a Student > Term Control Dates | Maintain a student's term control dates, including the fully enrolled date, fully graded date, and dates for showing enrollment and statistics on transcripts. |
| External Study | STDNT_EXT_STUDY | Records and Enrollment > Student Term Information > Term Activate a Student > External Study | Track and maintain external study programs, such as study abroad, that apply towards a student's career term record. |


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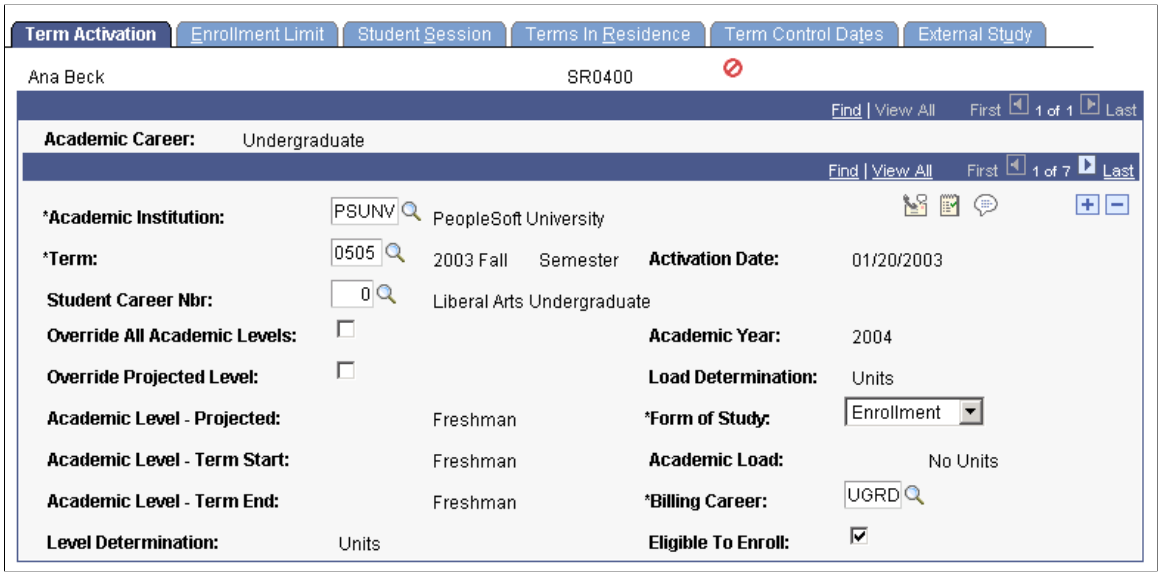
# Maintaining a Student's Career Term Record

Access the Term Activation page (Records and Enrollment > Student Term Information > Term Activate a Student > Term Activation).

**Image: Term Activation page**

This example illustrates the fields and controls on the Term Activation page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Academic Career** | This field displays all of a student's career term records by academic career. |
| **Academic Institution** | The system supplies an academic institution from the User Defaults component. You can specify any valid academic institution here, but you can add a record only if the student is active in an academic program at that academic institution as of the start date of the specified term. |
| **Term** | The system displays all active terms for a student. If you are performing a quick activation, enter the term in which to activate the student. |
| **Student Career Nbr** (student career number) | By default, the system sets the student career number to zero, which is the first academic program in the student's program stack and identifies the student's primary academic program. The system uses the student career number to perform various calculations, including the calculation of the student's academic level and load. You can override the student career number, for instance, for students in dual programs. After you override the student career number in one term, it rolls from term to term. |
| **Override All Academic Levels** | Select to modify all academic level fields on this page. This selection carries over to the next term, so when you add a new row to activate the student in the next term, this check box is selected by default. Also, when you override all academic levels, the system sets all academic levels for the next term to |

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the end of term level for the prior term row. You should select this check box sparingly, because doing so prevents the system from automatically determining the student's academic levels.

If you clear this check box, the system uses the academic level defaults that are established on the Academic Level Table page.

**Override Projected Level**

Select to modify the student's projected academic level. When you select this check box the Academic Level - Projected field becomes available to edit. If you clear this check box, the system recalculates the academic level projected if the level rule uses units or term progression.

**Academic Level - Projected**

The system displays the student's projected academic level at the start of the term, which is the student's actual academic level, provided that the student passes all in-progress units from previous terms. The system uses this field for enrollment restriction checking and tuition calculation, among other things.

You can override this field value if you select either the Override Projected Level check box or the Override All Academic Levels check box. You might override a student's projected academic level when you know that your academic institution will be receiving the student's transfer credit, but the credit has not yet been entered into the student's official record. When you override all academic levels, the system sets by default the academic levels for the next term to the value that is in the Academic Level - Term End field for the prior term row.

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**Note:** When a student is activated for a term, either through the batch Term Activation (SRTRMAC.SQR) process or in the Term Activate a Student (STDNT_ACTIVATION) component, the Override Projected Level check box is cleared and the Academic Level - Projected field becomes unavailable for edit.

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**Level Determination**

By default, the system displays the level determination value from the Level/Load Rules Table component, based on the level load rule that is attached to the student's primary academic program for the current career and term row

**Load Determination**

By default, the system displays the load determination value from the Level/Load Rules Table component, based on the level load rule that is attached to the student's primary academic program for the current career and term row.

**Academic Level - Term Start**

By default, the system displays the student's academic level at the beginning of the term, based on cumulative completed units from previous terms or transfer units. You can override this field value if you select the Override All Academic Levels check box. When you override all academic levels, the system sets by default the academic levels for the next term to the value that is in the Academic Level - Term End field for the prior term row.


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**Academic Level - Term End**

By default, the system displays the student's academic level at the end of the term, based on cumulative completed units, including work completed in this term and transfer units. You can override this field value if you select the Override All Academic Levels check box. When you override all academic levels, the system sets by default the academic levels for the next term to the value that is in the Academic Level - Term End field for the prior term row.

**Academic Year**

By default, the system displays the academic year, based upon the term that you enter.

**Academic Load**

The system displays the student's academic load, which is calculated in units enrolled if the level load rule is set to determine load based on units. Alternatively, the rule could determine load using a default value—assigned on the level load rule itself—or the load could be determined manually.

**Form of Study**

The system, by default, sets the student's form of study to *Enrollment,* but you can override this default value. The value of *Enrollment* tells the system that this form of study is unit-based. You can modify these translate values, with the exception of the *Enrollment* value.

**Eligible To Enroll**

The system, by default, selects this check box, which informs the enrollment engine that the student is eligible to enroll in classes for the specified term. Clear this check box to prevent the student from enrolling in classes for the specified term.

You might clear this check box when posting transfer credit to a student's career term record in which the student will not be eligible to enroll until a later date. The transfer credit posting process requires that a student is active in the term to which you are posting transfer credit.

**Billing Career**

The system, by default, sets the student's billing career to the academic career in the student's career term record. The tuition calculation process uses the student's billing career to calculate the student's tuition.

If the student is active in more than one academic career in the same term, you might want to consolidate tuition calculation and billing under a single academic career. If so, then point the billing career for all of the student's career term records to the same academic career. For example, a student might be enrolled in a term as both a graduate student and an undergraduate student. If you want to consolidate tuition calculation to just the undergraduate career, you would select undergraduate as the billing career for both the student's undergraduate term record and graduate term record.

If you decide to use a single billing career for all of a student's academic careers within a term, note that to perform a term or

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session withdrawal, the student must be enrolled in at least one class within the academic career that you select as the student's billing career. Otherwise, the term withdrawal and session withdrawal processes halt processing and instruct you to change the student's billing career to an academic career in which the student has enrollments for the term.

**Calculate Tuition** Click to go to the Tuition Calc (tuition calculation) page so that you can calculate tuition and fees for this student.

### Related Links

Understanding Transfer Credit Processing

Processing Withdrawals and Cancellations

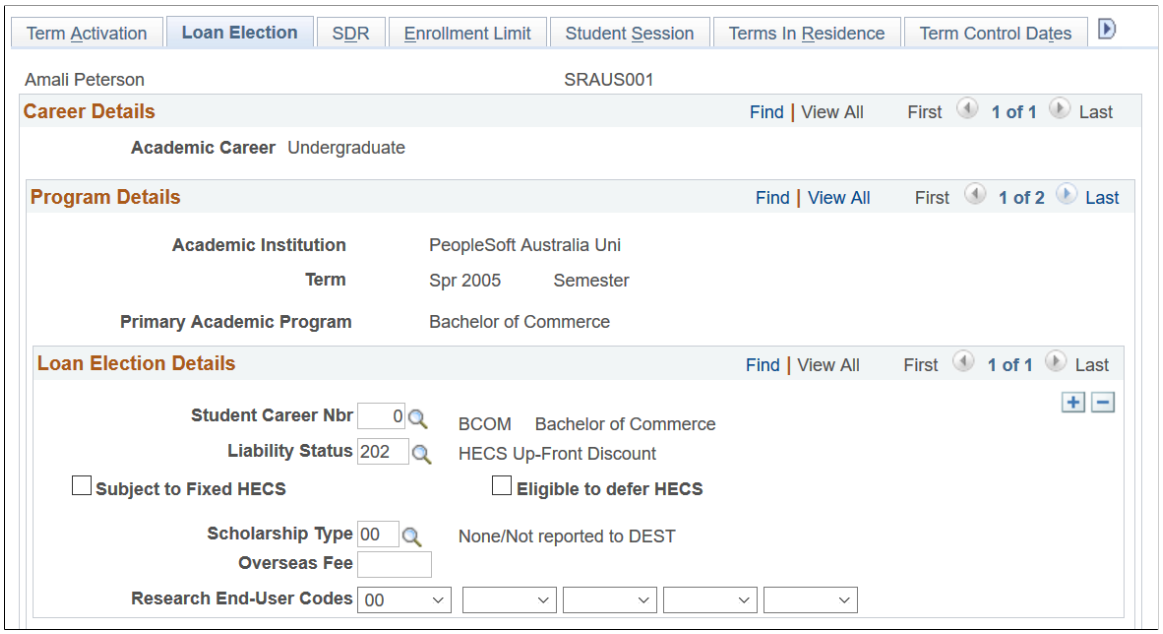
"Calculating Tuition for Multiple Students" (PeopleSoft Campus Solutions 9.2: Student Financials)

## (AUS) Setting Student Term Default Values

Access the Loan Election page (Records and Enrollment >Student Term Information >Term Activate a Student >Loan Election).

**Image: Loan Election page**

This example illustrates the fields and controls on the Loan Election page. You can find definitions for the fields and controls later on this page.




**Student Career Nbr** (student career number) Select a career number for the student. You can enter multiple rows when the student has multiple programs/career numbers.

**Liability Status** Enter a liability status. This value defaults to the enrollment pages.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| **Eligible to defer HECS** | Select if the student is eligible to defer HECS-HELP payments when they have nominated to pay up-front and have not paid their fees in full. |
| **Subject to Fixed HECS** | Select if the student qualifies to pay the fixed HECS fee for class enrollment. |
| **Scholarship Type** | Select the appropriate scholarship type for this student.<br><br>When you generate the DIISRTE Commonwealth Learning Scholarship file, the system includes all students who have a scholarship type of *3, 4,* or *5.* Type *5* scholarships have two records, one for CECS and one for CAS.<br><br>Generating the Student Data Files that Allow Revision |
| **Overseas Fee** | Enter any overseas fees for the student. |
| **Research End-User Codes** | Bundle 49. Documentation-update only. New field.<br><br>Select a code for each of the five fields. Each code indicates the type of research end-user engagement undertaken by a Higher Degree by Research student (element 593). |

## (NZL) Maintaining SDR Reporting Data for a Student

Access the SDR page (Records and Enrollment > Student Term Information > Term Activate a Student > SDR).

| | |
|---|---|
| **Student Career Nbr** (student career number) | Select a career number for the student. |
| **Foreign Fee** | Enter any foreign fee for the student. |
| **MAX Exempt Fee** | Enter the sum of all non-maxima fees charged to this student. |

## Maintaining a Student's Term Enrollment Limits

Access the Enrollment Limit page (Records and Enrollment > Student Term Information > Term Activate a Student > Enrollment Limit).

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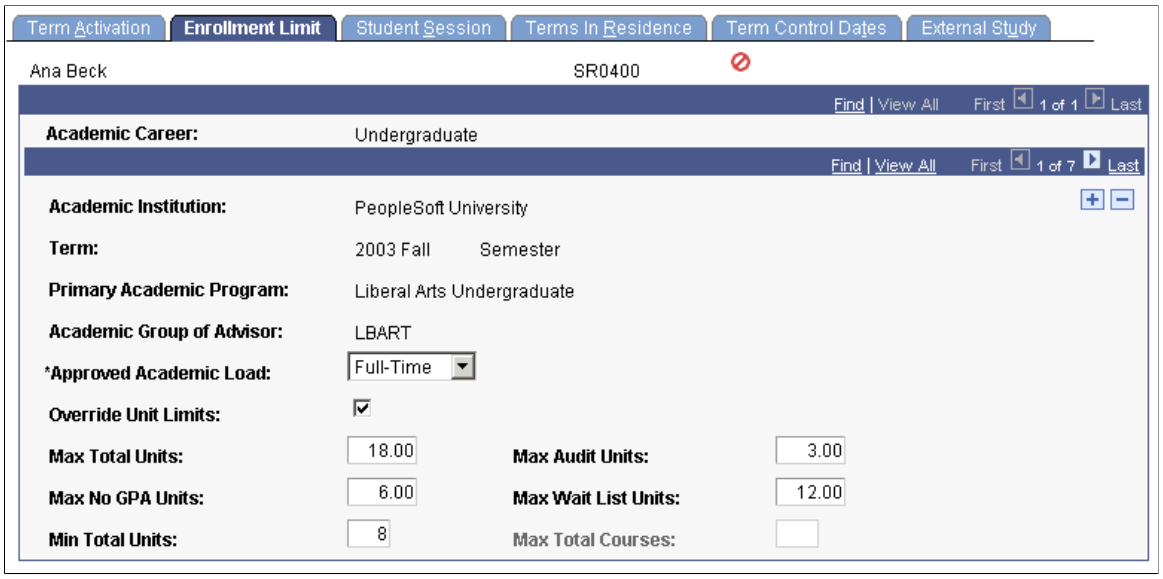
### Image: Enrollment Limit page

This example illustrates the fields and controls on the Enrollment Limit page. You can find definitions for the fields and controls later on this page.




**Approved Academic Load**

The system, by default, displays the student's approved academic load for their primary academic program for the term. You can override this value.

The student's approved academic program is set on the Student Program page (Records and Enrollment > Career and Program Information > Student Program/Plan > Student Program).

**Override Unit Limits**

Select to override the student's term enrollment limits for the approved academic load that you selected. The unit limit fields become available for entry. When processing enrollment requests with this override, the enrollment engine uses the term enrollment limits that you define on this page rather than the ones that are defined on the Enrollment page of the Academic Program Table component. When using this override, the enrollment engine *does not* include the wait list units in the maximum total unit limit. For example, assume that you limit the student to 18 maximum total units, 3 maximum no GPA units, 3 maximum audit units, and 9 maximum wait list units. The student can enroll in a maximum of 18 units for the term. Of these 18 units, the student can take 9 no GPA units (including 3 audit units). In addition to the 18 maximum total units, the student can take an additional 9 wait list units.

Clear this check box to have the enrollment engine use the term enrollment limits that are set on the Enrollment page of the Academic Program Table component.

**Max Total Units** (maximum total units)

Enter the maximum number of units that the student can enroll in for the term.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| **Max Audit Units** (maximum audit units) | Enter the maximum number of units that the student can take with an audit-grading basis for the term. |
| **Max No GPA Units** (maximum no GPA units) | Enter the maximum number of units that the student can enroll in with a non-GPA-grading basis for the term. |
| **Max Wait List Units** (maximum wait list units) | Enter the maximum number of wait list units that the student can have for enrollment for the term. |
| **Min Total Units** (minimum total units) | Enter the minimum number of units that the student must enroll in for the term. The enrollment engine references this value only when a student attempts to drop a class or make a units adjustment for a class. |
| **Max Total Courses** (maximum total courses) | The system displays by default the maximum number of courses in which a student can enroll for the term according to the value set on the Course Count Limits page. |

### Related Links

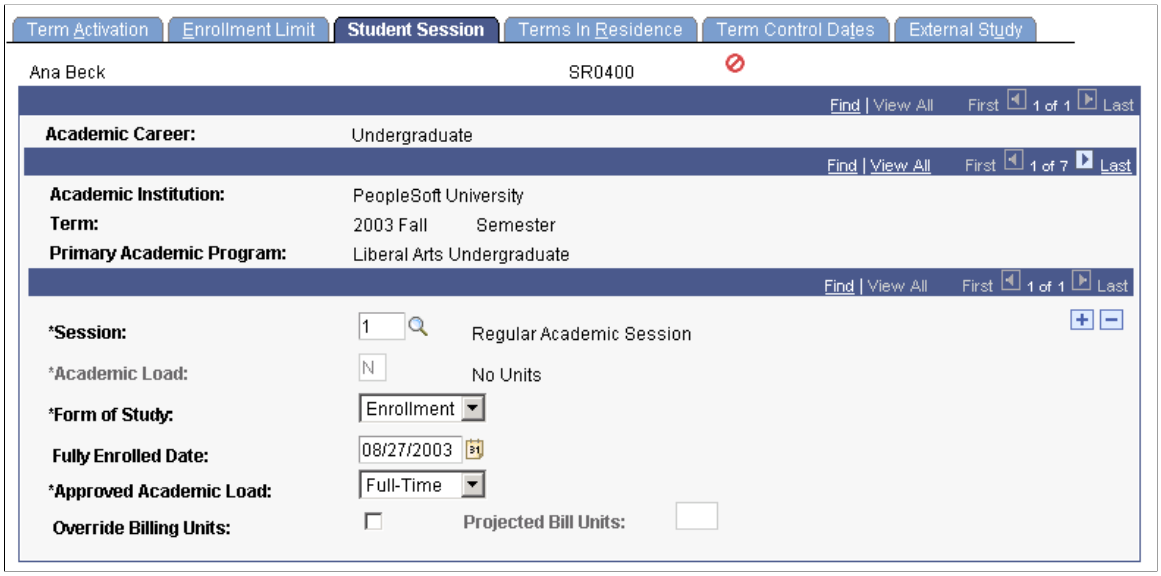
"Setting Up Term Enrollment Limits for Academic Programs" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

## Maintaining a Student's Session Data

Access the Student Session page (Records and Enrollment > Student Term Information > Term Activate a Student > Student Session).

**Image: Student Session page**

This example illustrates the fields and controls on the Student Session page. You can find definitions for the fields and controls later on this page.




This page displays all of a student's academic careers, terms, and sessions.

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**Session** Select the type of session in which the student will enroll into classes for the specified academic program and term.

**Academic Load** By default, the system displays the student's academic load for the term. You can change the value for an individual session within the term. The system calculates academic load based on the number of units for which the student is enrolled. This field is unavailable for edit if the form of study for the session is *Enrollment.*

**Form of Study** By default, the system displays the same form of study as defined for the term on the Term Activation page of this component. You can change the form of study for sessions that differ from the term value. For example, a student's form of study for the term is *Enrollment,* but the student is studying abroad for one session of that term. Values are *Abroad, Candidacy, Detached,* and *Enrollment.* You can modify these translate values with the exception of the *Enrollment* value.

By default, the system displays the student's approved academic load according to the value that is set on the Term Enrollment Limits page of the Academic Program Table component. You can override this field for an individual session within the term.

**Fully Enrolled Date** The date that the system considers the student fully enrolled for financial aid load calculations and billing purposes. The system, by default, sets the student's fully enrolled date to the corresponding date for the session, as defined in the academic calendar. You can override this date.

If you override the fully enrolled date because the student's account is due a refund, you must recalculate the student's tuition. You can calculate a student's tuition through the Tuition Calculation page in Student Financials.

**Approved Academic Load** Enter the student's approved academic load, such as *Full-Time* or *Part-Time.*

**Override Billing Units** Select if want to calculate the student's tuition bill with criteria other than the number of units in which the student enrolls. If you set billing units as a part of tuition calculation, the system displays the number of the student's projected billing units.

### Related Links

"Calculating Tuition for a Single Student" (PeopleSoft Campus Solutions 9.2: Student Financials)

## Maintaining a Student's Terms in Residence

Access the Terms In Residence page (Records and Enrollment > Student Term Information > Term Activate a Student > Terms In Residence).

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Use terms in residence to track to the number of terms in which a student is activated. Course work can be completed and easily tracked in terms. In addition, work that is accomplished outside the classroom—such as fieldwork and dissertation preparation—is also tracked by term even if the student is not enrolled in formal classes. For students affected by level load rules that are not based on terms, one term row equals one term in residence. For students affected by term-based level load rules, a term row can be greater than, equal to, or less than one term depending on the resident terms adjustment factor of the level load rule.

Academic Advisement does not use the term value that is stored here to calculate derived list terms in residence. Instead, the Advisement engine creates one term in residence for every term in which a student was enrolled at the academic institution.

**Current in Residence Terms**

The system, by default, displays the current number of terms in which the student is in residence within his or her primary academic program and term. If the level load rule that applies to the student has a resident terms adjustment factor, the system uses the student's approved academic load and the resident terms adjustment factor to determine the default value. Otherwise, the system displays *1* as the default value. You can override the value in this field.

**Transfer in Residence Terms**

Enter the number of terms that the student has transferred from another organization.

**Cumulative in Residence Terms**

The system displays the student's total number of current, past, and transfer terms. The value is the cumulative total of residency terms.

**TC Units Adjustment** (transfer credit units adjustment)

When you save this component, the system assigns the student to an academic level by adding up the student's transfer credit—for careers in which academic level is determined by units—and subtracting the value that is entered here. This enables you to decrease a student's transfer credit for the purposes of assigning the student to a lower academic level. This calculation does not affect the student's term or cumulative statistics, and the recalculated unit total is not displayed or stored in the system. The calculated sum affects only this student's academic level.

For example, you might allow a student to transfer in a total of 75 units for degree progress purposes, even though the student must remain a sophomore, which means she cannot have more than 59 units based on your level rule setup. To adjust the student's transfer credit units and assign the student to the appropriate academic level, enter *16* in this field. You can view the student's projected academic level, academic level at term start, and academic level at term end, on the Term Activation page. The system uses the value in the TC Units Adjustment field to calculate all of these levels.

Additionally, a field edit prevents you from entering more units in this field than the student has transfer units. So if the student has 10 transfer units, you cannot enter *11* in this field. Therefore,

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the TC Units Adjustment field subtracts only from transfer units.

**Copy TC Units** (copy transfer credit units)

Click to complete the transfer credit posting process. When you try to post transfer credit statistics for a student in a particular academic program and for a particular articulation term, the system checks whether the student is active in the term and academic program that you select. If the student is not active in either the academic program or the articulation term, the system sets the status to *Complete.* This enables you to evaluate transfer credit and store the statistical information for a student prior to the completion of the Activate Applications matriculation process (ABPCPPRC) in Recruiting and Admissions.

After you activate a student in the appropriate academic program and in the articulation term that you selected, you *must* click this button to transfer the student's transfer credit to the STDNT_CAR_TERM table in Student Records, thereby completing the transfer credit posting process. If you do not copy transfer credit units after term activation, the student's career term record will not reflect the student's transfer credit units for the term. Remember to save your changes after you click this button. The system does not update the STDNT_CAR _TERM table until the save is performed.

If you select a term without a transfer credit model status of *Complete,* the system displays a message informing you that there is nothing to update.

### Related Links

Viewing Student Statistics

Understanding Transfer Credit Processing

"Creating a Requirement Line Item" (PeopleSoft Campus Solutions 9.2: Academic Advisement)

## Maintaining a Student's Term Control Dates

Access the Term Control Dates page ((Records and Enrollment > Student Term Information > Term Activate a Student > Term Control Dates).

**Fully Enrolled Date**

Enter the date on which this student is considered fully enrolled in the specified term. As of this date, the student's coursework appears on the student's transcripts. This date is also used for financial aid load calculations and billing purposes. The system, by default, displays the corresponding value from the Term Calendar 3 page for the specified term based on the student's primary academic program for the term.

**Show Enrollment On Transcript**

Enter the date on which the system displays the student's work in progress on the transcript.


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|---|---|
| **Show Statistics On Transcript** | Enter the date on which the system displays the student's academic statistics on the transcript. |
| **Fully Graded Date** | Enter the date on which the system considers this student's enrollment record for the specified term as fully graded. This value comes from the academic calendar by default. When you define transcript types, you can indicate whether the transcript processes should use this date and display grade information. |

### Related Links

"Defining Traditional Academic Calendars" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

## Tracking and Maintaining a Student's External Study Agreements

Access the External Study page (Records and Enrollment > Student Term Information > Term Activate a Student > External Study).

| | |
|---|---|
| **External Org ID** (external organization ID) | Select the identification number of the external organization that is sponsoring the student's external study program. |
| **Country** | Select the country in which the external organization resides. |
| **Study Agreement** | Select the study agreement that describes the student's external study program. |
| **Start Date** and **End Date** | Enter the dates on which the student's external study program begins and ends. |

# Querying for Academic Level Differentials

Use the delivered public query STDENT_TERM_ADMIT_LEVEL to identify individuals with differences between their academic level on the admissions application, as defined on the Application Data page, and their academic level at term start, as seen on the Term Activation page. This query, which you can access through Query Manager, compares an individual's academic level in the Recruiting and Admissions table ADM_APPL_DATA to that same individual's academic level in the Student Records table ACAD_PROG through a view. If the values are different, the query captures these rows and displays them for you in Query Manager.

If the individual's academic level in the ACAD_PROG table is lower than the academic level in the ADM_APPL_DATA table and you want to increase the ACAD_PROG academic level, you must complete one of the following actions:

- Grant the student additional other credit units for a special course through the transfer credit process, provided that the student's academic program bases level and load determination on units.

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- Grant the student additional terms in residence credit through the Transfer In Residence Terms field on the Terms In Residence page of the Term Activation component, provided that the student's academic program bases level and load determination on terms.

If the individual's academic level in the ACAD_PROG table is higher than the academic level in the ADM_APPL_DATA table and you want to decrease the ACAD_PROG academic level, you must complete one of the following actions:

- Enter a negative credit amount in the TC Units Adjustment field on the Terms in Residence page of the Term Activation component, provided that the student's academic program bases level and load determination on units.
- Enter a negative terms in residence amount in the Transfer In Residence Terms field on the Terms In Residence page of the Term Activation component, provided that the student's academic program bases level and load determination on terms.


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