Setting Up and Managing Veterans Benefit Reporting

Setting Up Veterans Benefit Reporting

This section discusses how to set up:

- Instruction mode mapping.
- Payment mapping.
- Net tuition and fees calculation.

Pages Used to Set Up Veterans Benefit Reporting

Page Name	*Definition Name*	*Navigation*	*Usage*
Instruction Mode Mapping	SSR_VB_INSTR_MAP	Records and Enrollment > Enrollment Reporting > Veterans Benefit Reporting > Veterans Benefit Setup > Veterans Instruction Mode Map > Instruction Mode Mapping	Map class instruction modes with Veterans Instruction modes of Distance Learning and Residential.
Payment Mapping	SSR_VB_PAY_MAP	Records and Enrollment > Enrollment Reporting > Veterans Benefit Reporting > Veterans Benefit Setup > Payment Mapping	Identify Veterans Benefit payment item type groups for Federal, State and Yellow Ribbon funding.
Net Tuition and Fees Setup	SSR_VB_TF_SETUP	Records and Enrollment > Enrollment Reporting > Veterans Benefit Reporting > Veterans Benefit Setup > Net Tuition and Fees Setup	Identify eligible tuition, fees, financial aid and waivers for the Veterans Net Tuition and Fees calculation.

Setting Up Instruction Mode Mapping

Access the Instruction Mode Mapping page (Records and Enrollment > Enrollment Reporting > Veterans Benefit Reporting > Veterans Benefit Setup > Veterans Instruction Mode Map > Instruction Mode Mapping).

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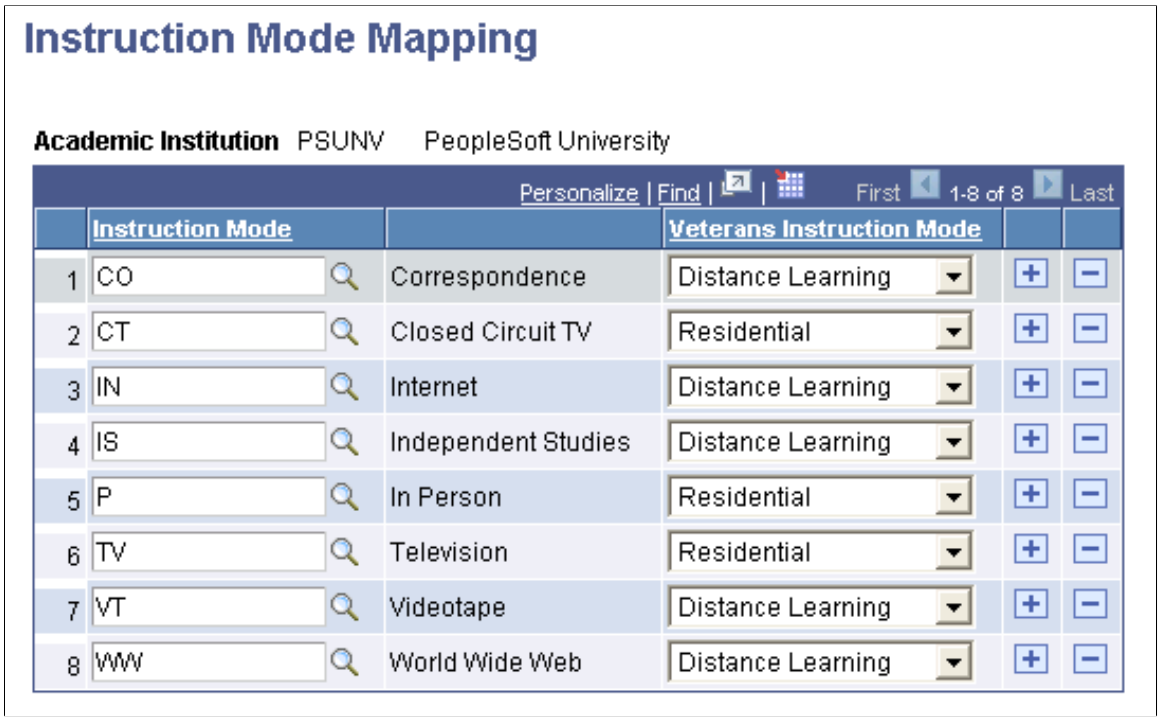
Image: Instruction Mode Mapping page

This example illustrates the fields and controls on the Instruction Mode Mapping page . You can find definitions for the fields and controls later on this page.



Use this page to map the instruction mode of a class to a veterans instruction mode.

The Enrollment Certification page uses this mapping to categorize class units taken as Residential or Distance Learning.

See Certifying Student Enrollment

Instruction Mode

Select an instruction mode. Values are inherited from the Instruction Mode field on the Components page (Curriculum Management > Course Catalog > Course Catalog > Components).

See Defining Course Components

Veterans Instruction Mode

Map a class instruction mode to a veterans instruction mode of either *Residential* or *Distance Learning,* but not both.

Setting Up Payment Mapping

Access the Payment Mapping page (Records and Enrollment > Enrollment Reporting > Veterans Benefit Reporting > Veterans Benefit Setup > Payment Mapping).

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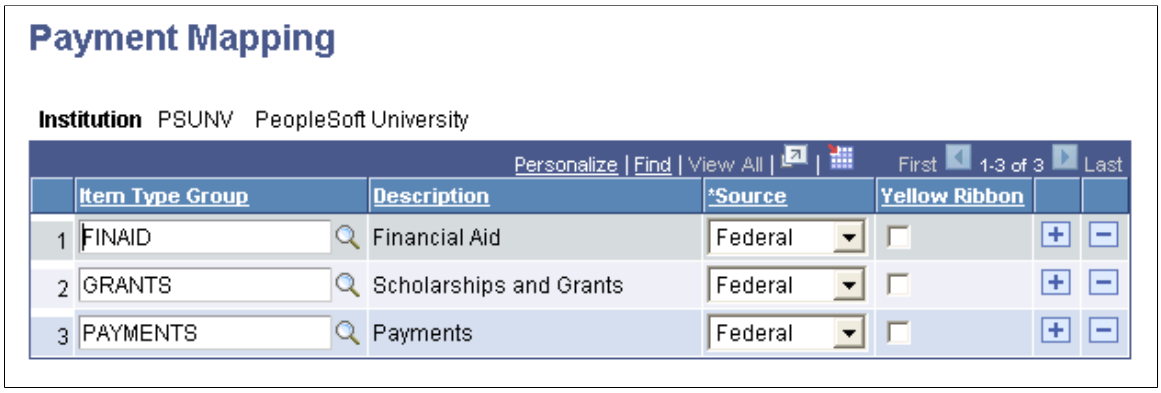
Image: Payment Mapping page

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



Use this component to map veterans payments with their source of funds.

Item Type Group

Select an item type group to map with its funding source. Item type groups are defined on the Item Types Group page and in the Tree Manager.

See "Defining Item Type Groups" (PeopleSoft Campus Solutions 9.2: Student Financials)

See *PeopleTools: Tree Manager*

Source

Select a funding source to correspond with the particular item type group. Select either *Federal* or *State* as the source.

Yellow Ribbon

Select the Yellow Ribbon check box if the particular item type group is funded through the Yellow Ribbon program. The check box is available only if the source is Federal.

The setup on this page defines the Source and Yellow Ribbon data that appear on the Payment History page.

See Viewing Veterans Payment History

Setting up Net Tuition and Fees

Access the Net Tuition and Fees Setup page (Records and Enrollment > Enrollment Reporting > Veterans Benefit Reporting > Veterans Benefit Setup > Net Tuition and Fees Setup).

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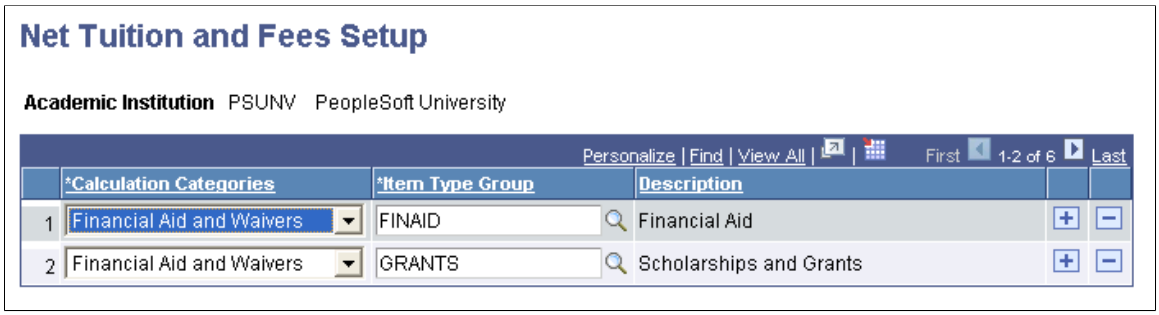
Image: Net Tuition and Fees Setup page

This example illustrates the fields and controls on the Net Tuition and Fees Setup page. You can find definitions for the fields and controls later on this page.



Use this component to define eligible item type groups to be used to calculate the Veterans' Net Tuition and Fees as tuition, fees, financial aid and waivers. The Veterans Tuition Worksheet page inherits item type groups for calculation from this page.

See Calculating Net Tuition and Fees

Calculation Categories Select a calculation category from the list to map it with a particular item type group. You can select either *Tuition and Fees* or *Financial Aid and Waivers*.

Item Type Group Select an item type group to map it with a calculation category.

Managing a Student's Veterans Benefit Information

This section discusses how to define and maintain Veterans Benefit information for a student.

Pages Used to Manage a Student's Veterans Benefit Information

Page Name	*Definition Name*	*Navigation*	*Usage*
Veterans Benefit Summary	SSR_VB_DATA	Records and Enrollment > Enrollment Reporting > Veterans Benefit Reporting > Veterans Benefit Summary	Define and maintain a summary of a student's Veterans Benefit.
Attachments	SSR_VB_ATTACH	Records and Enrollment > Enrollment Reporting > Veterans Benefit Reporting > Veterans Benefit Summary > Attachments	Attach Veterans Benefit-related documents.

Defining and Maintaining Veterans Benefit Information for a Student

Access the Veterans Benefit Summary page (Records and Enrollment > Enrollment Reporting > Veterans Benefit Reporting > Veterans Benefit Summary).

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Image: Veterans Benefit Summary page (1 of 2)

This example illustrates the fields and controls on the Veterans Benefit Summary page (1 of 2). You can find definitions for the fields and controls later on this page.

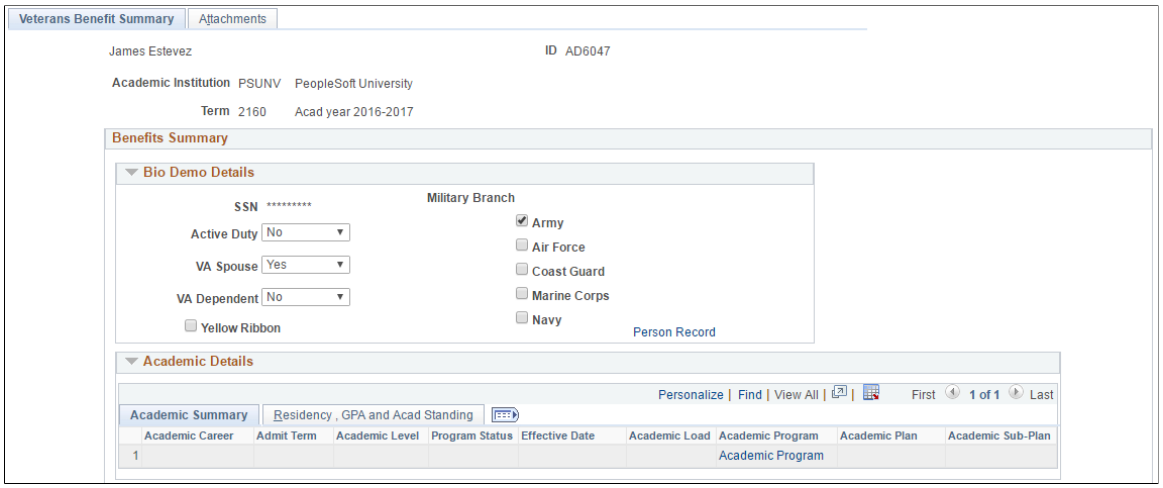
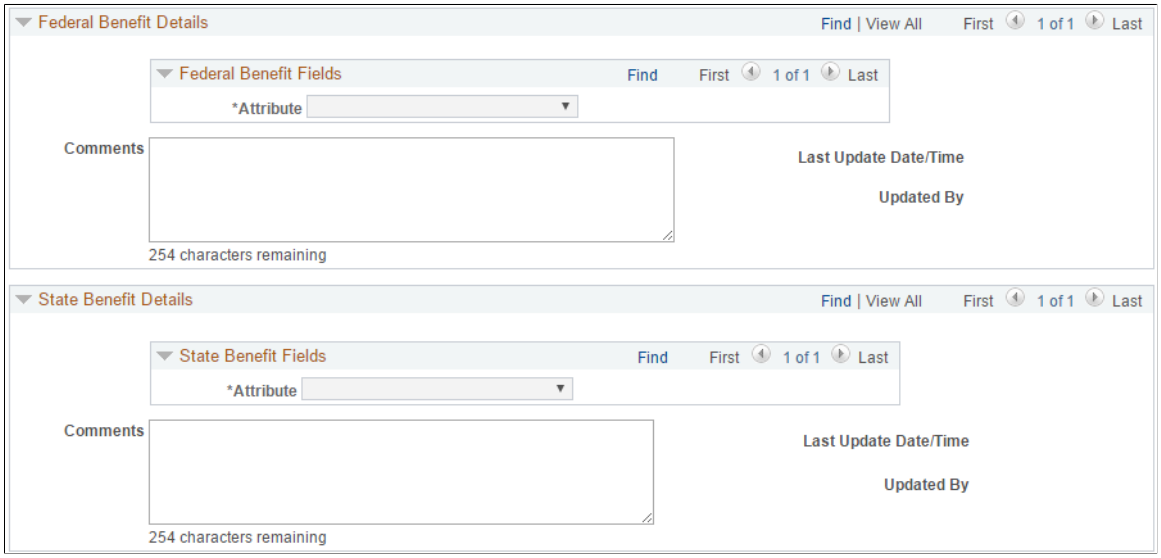


Image: Veterans Benefit Summary page (2 of 2)

This example illustrates the fields and controls on the Veterans Benefit Summary page (2 of 2). You can find definitions for the fields and controls later on this page.



Bio Demo Details

Enter or update the student's biographical details.

For information on how to mask the social security number:

See "Applying Demographic Data Access Security" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

For information about service indicators:

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See "Setting Up Service Indicator Codes and Reasons" (PeopleSoft Campus Solutions 9.2: Campus Community)

Yellow Ribbon Select this check box if the student is enrolled in the Yellow Ribbon program. If the check box is selected, the system displays the Yellow Ribbon section on the Tuition Worksheet.

Person Record Select this link to access the student's biographical and demographic data.

Use the Addresses page to indicate the address to which the Veterans Benefit check is to be sent. The Veterans Administration verifies that the recipient's address they have matches the address that your institution indicates.

Federal Benefit Details and State Benefit Details

The attributes available here are those that you define on the Common Attribute page (Set Up SACR, Common Definitions, Common Attributes Setup, Common Attribute).

After you define attributes, associate attributes with a record context on the Record Context page (Set Up SACR, Common Definitions, Common Attributes Setup, Record Context).

The delivered record contexts are SSR_VB_FED_AUD and SSR_VB_STA_AUD.

See "Understanding Common Attribute Framework" (PeopleSoft Campus Solutions 9.2: Campus Community)

See "Defining a Common Attribute" (PeopleSoft Campus Solutions 9.2: Campus Community)

See "Associating a Common Attribute to a Record" (PeopleSoft Campus Solutions 9.2: Campus Community)

Creating and Updating Terms

This section discusses how to create and update terms.

Page Used to Create or Update Terms

Page Name	*Definition Name*	*Navigation*	*Usage*
Create/Update Term Process	SSR_VB_RC_UPDTRM	Records and Enrollment > Enrollment Reporting > Veterans Benefit Reporting > Create/Update Term Process	Create the Net Tuition and Fees page and the Enrollment Certification page; and update records.

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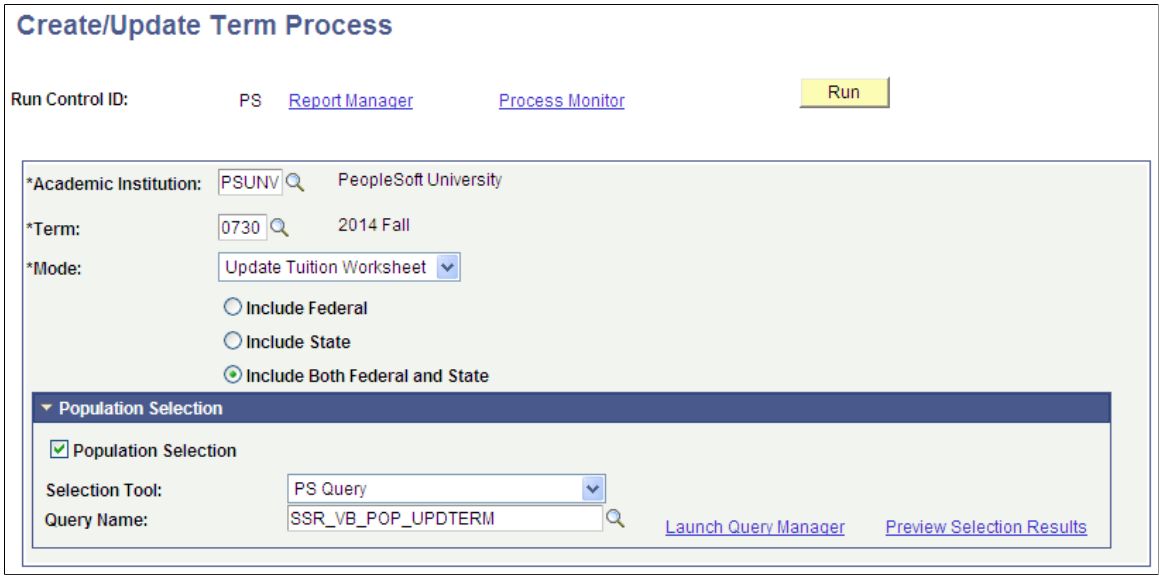
Creating and Updating Terms

Bundle 52. To display location and ZIP code, this process is updated to populate LOCATION from CLASS_TBL and the current associated POSTAL value from LOCATION_TBL for each enrollment that is added to the Enrollment Certification record (SSR_VB_ENRL_DTL).

Access the Create/Update Term Process page (Records and Enrollment > Enrollment Reporting > Veterans Benefit Reporting > Create/Update Term Process).

Image: Create/Update Term Process page

This example illustrates the fields and controls on the Create/Update Term Process page. You can find definitions for the fields and controls later on this page.



Update Enrollment Mode

Depending on the status of the record, the system performs various tasks when you run the Create/Update Term process:

- New Records: If no enrollment certification record exists for the student and the term, the system creates a record. For a student's enrolled units and academic history, it populates fields on the Enrollment Certification page. The new record is set to *In review* status and is listed in the log as a new record with the student name and EMPLID. If the class status is *Dropped,* the system populates the Drop Date field; and if the attendance roster is used, the Last Date Attended field. The system also calculates the number of units taken for *Residential* and *Distance Learning* classes.
- In Review Records: For records with an *In review* status, the system overrides any manual changes made to the record and updates the term Enrollment Information.
- Reported Records: For records with a *Reported* status, the system versions the existing record and creates a new record for the student with the *In review* status. The system logs all records sequenced by this process with the Student Name and EMPLID information.

Update Tuition Worksheet Mode

When you select this mode, the following options become available on the page:

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- Include Federal
- Include State
- Include Both Federal and State

Depending on the status of the record and the option selected, the system performs various tasks when you run the Create/Update Term process:

- New Records: If no Tuition Worksheet exists for the student for the term, the system creates a record.
- In Review Records: If a record exists with an *In review* status, the Tuition Worksheet replaces the In Review record, assigning it an *In review* status. The system logs all records created by this process with the Student Name and EMPLID information.

  If Both Federal and State is selected, both State and Federal Tuition Worksheets are updated. If the Benefit Summary page contains information related to the State, then the system creates a State Tuition Worksheet with an *In review* status.
- Reported Records: If a record exists with the *Reported* status and you run the Create/Update Term Process, the system creates a new incremental record for the student with an *In review* status.

  The system updates both Federal and State Tuition Worksheets if Both State and Federal is selected. If a State Tuition Worksheet does not exist, the system creates it if the Benefit Summary page has any fields defined for the term. The system logs all records sequenced by this process with the Student Name and EMPLID information.

Population Selection

The Population Selection group box is a standard group box that appears on run control pages when the Population Selection process is available or required for the transaction. Selection tools are available based on the selection tools that your institution selected in the setup of the Population Selection process for the application process and on your user security. Fields in the group box appear based on the selection tool that you select. The fields behave the same way from within the group box on all run control pages and application processes. If your institution uses a specific delivered selection tool to identify IDs for a specific transaction, you must use it.

Selection Tool	Select *PS Query.*
Query Name	The *SSR_VB_POP_UPDTERM* query is delivered. If you create your own query, you must use the following bind record: SSR_VB_UPDT_BND.

See "Using the Population Selection Process" (PeopleSoft Campus Solutions 9.2: Campus Community)

Certifying Student Enrollment

This section discusses how to certify a student's enrollment for a reporting period.

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Page Used to Certify Student Enrollment

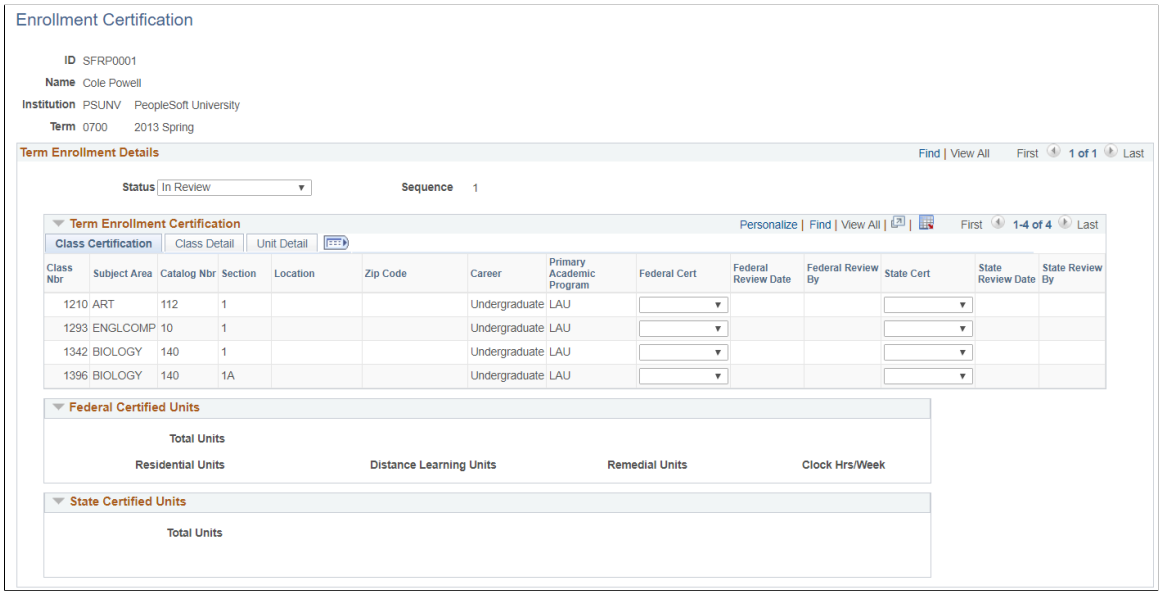
Page Name	*Definition Name*	*Navigation*	*Usage*
Enrollment Certification	SSR_VB_ENRL_CERT	Records and Enrollment > Enrollment Reporting > Veterans Benefit Reporting > Enrollment Certification	Review and certify student enrollment.

Certifying Student Enrollment For a Reporting Period

Access the Enrollment Certification page (Records and Enrollment > Enrollment Reporting > Veterans Benefit Reporting > Enrollment Certification).

Image: Enrollment Certification page

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



Status

In Review: The page can be updated by the Create/Update Term process.

Reported: The page is display only. Any updates that result from the Create/Update Term process create another page with an *In Review* status for the term.

Term Enrollment Certification

Bundle 52. New columns: Location and Zip Code

Select the Class Certification tab.

Certify the eligible classes where the student has enrollment. Some fields in this group box inherit their values from the Enrollment Summary page. Select the certification of the class—Federal or State— if applicable. You may leave State Cert blank if there is no State-level Veterans Administration for the

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institution; in which case, the corresponding units do not reflect in the total State Certified Units. On save, the Review Date and Review By fields are updated and totals displayed.

Select the Class Detail tab:

View details about the student's class activity during the term. If a class is dropped, the Drop Date field is populated. If the attendance roster is being used, the Last Date Attended is calculated. You can override or manually enter the date.

Select the Unit Detail tab:

View details about residential, distance learning units, and remedial clock hours and units, if applicable. If the class is Remedial, and the indicator is set to *Yes*, then the Remedial Units field is populated. If applicable, enter the number of clock hours per week for the student in the Clock Hrs/Week field.

Calculating Certified Units

Review information about Federal Certified Units and State Certified Units. Based on information entered in the Class Certification fields, the system calculates the total of Federal-certified and State-certified units. It provides details of residential, distance learning and remedial units, and the total number of clock hours, if applicable, for Federal-certified classes.

Calculating Net Tuition and Fees

This section discusses how use the Tuition Worksheet to calculate net tuition and fees for a student. It discusses:

- Calculating Federal Net Tuition and Fees
- Calculating State Net Tuition and Fees

Pages Used to Calculate Net Tuition and Fees

Page Name	*Definition Name*	*Navigation*	*Usage*
Federal Benefit Details	SSR_VB_TUI_WRK_FED	Records and Enrollment > Enrollment Reporting > Veterans Benefit Reporting > Veterans Tuition Worksheet > Federal Benefit Details	Calculate net tuition and fees for Federal reporting.
State Benefit Details	SSR_VB_TUI_WRK_STA	Records and Enrollment > Enrollment Reporting > Veterans Benefit Reporting > Veterans Tuition Worksheet > State Benefit Details	Calculate net tuition and fees for State reporting.

Calculating Federal Net Tuition and Fees

Access the Federal Benefit Details page (Records and Enrollment > Enrollment Reporting > Veterans Benefit Reporting > Veterans Tuition Worksheet > Federal Benefit Details).

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Use this page to calculate net tuition and fees eligible for Federal benefit from the Veterans Administration.

Summary

Use Actual	Select this calculation method to view the Actual Tuition and Fees section details.
Use Rate Per Unit	Select this calculation method to view the Rate Per Unit Tuition and Fees section details. Based on the Benefit Type selected —*Federal* or *State*—the Certified Units field displays the sum of certified units.
Use Equation	Select this calculation method to view the Tuition and Fees Equation section details.
Anticipated Payment	Enter the benefit amount anticipated from the Veterans Administration, if any. The maximum value is 99,999.99.

Actual Tuition and Fees

Item Type	This field derives its values from the Tuition and Fees item type groups defined in the Net Tuition and Fees Setup page, with the amount assessed on the student's account for that term.
Override	Enter the amount to be overridden. Click Update to revise totals.

Rate Per Unit Tuition and Fees

Enter the rate per unit and click Update for the system to calculate the total tuition and fees.

Tuition and Fees Equation

Select an available Tuition and Fees equation to calculate the total tuition and fees. Click Calculate to return the Total Tuition and Fees. Click Update to revise Net Tuition and Fees.

See "Understanding Equation Engine" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

See "Defining an Equation" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

Financial Aid and Waivers

This displays the Financial Aid and Waivers actually disbursed on to the student accounts for the term. Eligible item type groups are defined on the Net Tuition and Fees Calculation Setup page. You can override an actual amount, add or delete an item type.

Yellow Ribbon

This section is visible only if the Yellow Ribbon option was selected on the Benefit Summary Page. Enter Out of State and In State tuition and fees and click Update to return the Unmet Tuition and Fees and Veterans Payment. You can store a predetermined amount from the Yellow Ribbon program for a student.

See Setting Up Veterans Benefit Reporting

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Calculating State Net Tuition and Fees

Access the State Benefit Details page (Records and Enrollment > Enrollment Reporting > Veterans Benefit Reporting > Veterans Tuition Worksheet > State Benefit Details).

For information about the State Benefit Details page, refer to the section on Federal Benefit Details. It contains all the information required for this page.

Viewing Veterans Payment History

This section discusses how to view a student's Veterans payments.

Pages Used to View Veterans Payment History

Page Name	*Definition Name*	*Navigation*	*Usage*
Veterans Payment History	SSR_VB_PAY_HIST	Records and Enrollment > Enrollment Reporting > Veterans Benefit Reporting > Veterans Payment History	View a student's veterans payment history.

Viewing a Student's Veterans Payments

Access the Veterans Payment History page (Records and Enrollment > Enrollment Reporting > Veterans Benefit Reporting > Veterans Payment History).

Use the Veterans Payment History page to view the actual veterans payments applied to a student account and adjustments to the payments, if any. Click Save and reenter the page to view payments within the defined term range.

The Yellow Ribbon section appears only if the Yellow Ribbon check box is selected for an item type group in the Payment Mapping page.

Comments Use this field to save information relevant to the veterans benefit payments received.

Rolling Over a Student's Benefit Summary Information

This section discusses how to roll over a benefit summary.

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Page Used to Roll Over a Student's Benefit Summary

Page Name	*Definition Name*	*Navigation*	*Usage*
Rollover Benefit Summary	SSR_VB_RUN_SUMM	Records and Enrollment > Enrollment Reporting > Veterans Benefit Reporting > Rollover Benefit Summary.	Transfer a student's benefit information from one term to another.

Rolling Over a Benefit Summary

Access the Rollover Benefit Summary page (Records and Enrollment > Enrollment Reporting > Veterans Benefit Reporting > Rollover Benefit Summary).

Selection Tool Select *PS Query.*

Query Name The *SSR_VB_POP_ROLL_BNSUMM* query is delivered.

If you create your own query, you must use the following bind record: SSR_VB_ROLL_BND.

See "Using the Population Selection Process" (PeopleSoft Campus Solutions 9.2: Campus Community)

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