Campus Solutions Glossary – Student Financials

The Campus Solutions Glossary – Student Financials defines many of the terms that are used in the Student Financials module of the new student information system. It also includes general terms that may be relevant to Student Financials. The glossary will continue to be updated throughout Illinois State University's transition to Campus Solutions.

Glossary Navigation

All terms are listed in alphabetical order. You can click a letter to go to all the terms that begin with that letter, or you can search the page for a particular term.

To search the page in Adobe Reader:

1. Enter Crtl+F. A small text box will appear in your reader window.
2. Type the term you wish to find in the box. Adobe Reader will automatically attempt to locate a match.
3. Use the *Previous* and *Next* buttons to cycle through all possible matches.

Glossary Terms

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# #

1098-T – an IRS tax form that reports the payments a student made to Illinois State University for qualified education expenses (or, alternatively, the amounts billed for such expenses). (Student Financials)

3Cs (Communications, Checklists, Comments) – a flexible way to send and track correspondence, lists of requirements, and notes to students, staff, and organizations.

- **Checklist** – a "to-do list" of action items that are assigned to a student to complete
- **Comments** – a notation field for additional comments on a user record
- **Communications** – a method to send and track communications to a user

3C Engine – an application that enables automation of 3Cs processes. The 3C engine automatically adds, deletes, and updates communications, checklists, and comments according to Illinois State University policies.

3C Group – a method of grouping users to control or restrict access to 3Cs, as determined by security-based roles.

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A

Academic Advisement – the module of Campus Solutions that is used to track a student's progress toward a degree.

Academic Career – all the course work undertaken by a student that is maintained in a single record. Illinois State University offers three academic careers: undergraduate, graduate, and continuing education.

Academic Group - the highest level division of an institution, used mostly for reporting, catalog defaults, and meeting patterns. Illinois State University has seven academic groups: the College of Applied Science and Technology, College of Arts and Sciences, College of Business, College of Education, College of Fine Arts, Mennonite College of Nursing, and the Office of the Provost.

Academic Institution – the highest organization in the academic hierarchy. Illinois State University is the only institution in Campus Solutions. It is assigned the code, "ILSTU."

Academic Load – an indication of full-time or part-time enrollment based on the number of units enrolled and the academic load rules for the term. Academic load impacts eligibility for residential housing and financial aid.

Academic Organization – the department which has financial and work responsibility for an academic plan. At Illinois State, academic organizations correspond to academic departments (such as the Department of Family and Consumer Sciences) and to colleges (such as Mennonite College of Nursing).

Academic Plan – the course of study a student follows to fulfill the requirements of a degree, such as a BA in English or an MS in Chemistry. An academic plan is equivalent to a major, minor, or certificate.

Academic Program – the entity to which a student applies, is admitted, and ultimately graduates from. Programs define many different rules for academic processes, such as grading, financial aid, and class repeat rules. At Illinois State University, programs are a combination of colleges and academic careers, such as the College of Business undergraduate program and the College of Arts and Sciences graduate program.

Academic Session – a period of time during which the University holds classes. Sessions can span the full length of a term or any amount of time within it, such as the first half of the Fall term or the last quarter of the Summer term.

Academic Structure – the Campus Solutions term for the relationships among Illinois State University, its colleges and departments, the courses they offer, and the terms and sessions within the academic year.

Academic Subjects – the specific areas of instruction that are offered by academic organizations. For example, MAT 120 belongs to the math subject.

Academic Sub-plan – an area of specialization within an academic plan. For example, Animal Science is a sub-plan within the Agriculture BS plan. Note that sub-plans are not used for minors (because a minor is an academic plan in its own right).

Academic Term – a period of time containing one or more academic sessions. At Illinois State University, there are three academic terms, equivalent to semesters: Fall term, Spring term, and Summer term.

Account Type – a group of similar item types. For example, all of the item types associated with housing charges are grouped under a single account type of "Housing." (Student Financials)

Accounting Entries – the credit or debit records on the general ledger, also known as "accounting lines." All transaction activity at Illinois State University, such as tuition payments, fees, and refunds, is recorded by accounting entries. (Student Financials)

Adjustment Calendar – the calendar that determines the amount of a refund that students receive when they drop their courses. Refunds are based on the amount of time that has passed since the first day of the term or session. In the spring 2015 term, for example, a student who dropped a class before January 27 received a 100% refund. (Student Financials)

Admissions – the Campus Solutions module that handles the University's admission process, including student applications and associated documents, fees, and evaluation. This module is also used to admit a student to an academic program and an academic plan.

Advising Student Groups – the student groups that can be used in advisement processes and academic requirements.

Aging Set – a group of aging categories that define a bill as future, current, or past due based on the number of days from a specified date (usually the billing date). For example, normal billing processes contain categories for 30 days overdue, 60 days overdue, and 90 days overdue. (Student Financials)

B

Billing and Due Date Calendar – the calendar that determines the due dates for tuition and fee payments. The calendar calculates the due date based on the distance from a pivot date – for example, the number of days from the start of the term. (Student Financials)

Billing Career – the career that is used to calculate a student's tuition and fees. The billing career is almost always the same as the student's academic career (students in the accounting BS/MPA program are the one exception). Illinois State has three careers: undergraduate, graduate, and continuing education. (Student Financials)

Billing Message – text that appears on a bill. Billing messages are defined once and then linked to one of five types. (Student Financials)

- **Aging Set Message** is the text that will be displayed on bills that fall within a particular aging category, such as *60-90* days past due.
- **Business Unit Message** is the text that will be displayed on all bills sent by Illinois State University.
- **Corporation Message** is the text that will be displayed on bills sent to a particular external organization, such as College Illinois*.*
- **Customer Message** is the text that will be displayed on bills that are sent to a particular student or other customer.
- **Item Type Message** is the text that will be displayed on bills that contain a particular item type, such as tuition charges.

Billing Standard Request – the parameters that Campus Solutions uses to identify and bill groups of students or organizations, such as all undergraduate students or all organizations with a balance above $1,000. Billing standard requests are created once and then used repeatedly when needed. (Student Financials)

Bio/Demo Data – the biographic and demographic data about a person, such as name, addresses, phone numbers, citizenship, email address, and ethnicity.

Buildings – the physical places on campus that house rooms and facilities. For example, Turner Hall and Schroeder Hall are buildings at Illinois State University.

Business Unit – the organization in Student Financials that is responsible for billing. At Illinois State, there is one business unit that is assigned the code "ILSTU." (Student Financials)

C

Campus Community – the module of Campus Solutions used to create and update the records of people and organizations. Campus Community acts as a central hub by sharing data with all other modules, including Admissions, Advising, Financial Aid, Student Financials, and Student Records.

Campus Solutions – the student information system (SIS) at Illinois State University. Campus Solutions is comprised of six modules: Admissions, Advising, Campus Community, Financial Aid, Student Financials, and Student Records.

Cashiering Office – a group of cashiers and cash registers that accepts in-person payments from students and other customers. The cashiering office at Illinois State University is the Student Accounts main office. (Student Financials)

Charge Priority List – the set of rules that determine which charges a payment is allowed to pay. For example, cash payments are allowed to pay all charges in all terms, while certain scholarships are only allowed to pay housing charges in the current term. (Student Financials)

Class Fee – an extra fee that is assessed to all students who enroll in a particular class section. For example, ART 333 Topics in Advanced Photography could have a $5 material fee for section one of the Fall 2015 class and a $6 material fee for section two, depending on the subject that each section is studying. (Student Financials)

- **Class Fee Modal** is the component that allows Student Records staff to charge class fees.

Cloud – another word for the Internet. A company that provides cloud-based services remotely hosts data, software, and the physical infrastructure, such as servers and network devices. Campus Solutions is a cloud-based product.

Collection Agreement – a contract that specifies how a debt will be paid off for a person who is no longer enrolled at Illinois State University. (Student Financials)

Collection Criteria – the filters that determine who will be assigned a new debt that has been placed in collections. For example, one collection agent could be assigned to all collections over $1,000, while another could be assigned to all students who were in the College of Business. (Student Financials)

Connector Type - a logical operator that is used to determine if some or all conditions in a statement are true. The two connector types are:

- AND - the process will succeed if all conditions are met
- OR - the process will succeed if one or all of the conditions are met

For example, a requisite condition could be set up to make students eligible to enroll in a course if they are: in their first-year AND have an ACT Math score over 25; OR if they are in their second-year AND have a GPA of 3.0.

Constituents – the friends, alumni, organizations, foundations, or other entities affiliated with Illinois State, and about which the University maintains information.

Correct History – a Campus Solutions edit mode which allows the user to make changes to current or past records. Correct history mode is only meant to be used to fix mistakes, not to make changes. Changes to a record should be made by adding a new row with a new effective date.

Contract Group – a set of third party contracts. For example, an external organization paying for multiple courses at Illinois State University could group their contracts together to limit the total amount they spent on those courses. (Student Financials)

Contract Number – the name for a third party contract. The contract number does not actually have to be a number, and often it is not. For example, a contract number might be "COLLEGE ILL 15-16," designating a contract with College Illinois for the 2015-2016 academic year. (Student Financials)

Course Fee – an extra fee that is assessed to all students who enroll in a particular course. For example, ART 103 has a $5 material charge. (Student Financials, Student Records)

- **Course Fee Modal** is the component that allows Student Records staff to charge course fees.

Course List Fee - an extra fee that is assessed to all students who enroll in any of the courses in a course list. For example, ART 103, 104, and 105 could all be placed on a course list and then assessed a single fee. (Student Financials)

Credit History – the process that Campus Solutions uses to assign outstanding charges to an aging category, such as 30, 60, or 90 days past due. (Student Financials)

Criteria – the conditions that Campus Solutions uses to determine which tuition and fee rates to assess a student. If a student meets the criteria, the system will assess the charge. There are two kinds of criteria. (Student Financials)

- **Trigger Criteria** are used to determine whether a student is eligible for term fees, course fees, class fees, and waivers. For example, Illinois State University students

who only take courses online are charged an outreach fee instead of the general fees.

- **Tuition Group Criteria** are only used to determine which tuition group a student should be placed in, such as graduate or undergraduate.

CRM (Customer Relationship Management) – a tool that manages the entire lifecycle of a person's relationship with Illinois State University, from the moment the person is a prospect, through application, admission, enrollment, graduation, and as an alumnus or alumna. Illinois State's CRM application is called RightNow.

Cross Functional Committee – an advisory committee that reviews decisions and recommendations about Campus Solutions at Illinois State. This committee is comprised of key University staff members in multiple departments.

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D

Direct to GL Entries – the general ledger accounting entries that are not associated with an Empl ID. Direct to GL entries are only created when processing application fees. (Student Financials)

E

Effective Date – the date at which a piece of data is considered official or effective. Campus Solutions uses effective dates to maintain a historical record of past data. Instead of deleting or overriding data, a new set of data is entered with a new effective date, which tells the system to use the new information from that date forward.

Empl ID (Employee ID) – a Campus Solutions person identifying number. All students, faculty, staff, and constituents will have unique Empl IDs.

Enrollment Cancellation – the process which marks students who should be dropped from their classes because of past due charges. The Student Financials process does not actually drop students from classes; rather, it flags students who are past due for the Student Records module to process. (Student Financials)

Equation Engine – a programming tool that uses logical rules or statements to read and change Campus Solutions data tables, used most frequently by financial aid.

Event – a trigger-based, predefined point that automatically creates, updates, or deletes information. For example, if a student at Illinois State enrolls in a course (event), the student will be given automatic access to the course in self-service.

External Organizations – the schools, businesses, or non-profit organizations that conduct business with Illinois State. For example, the Thomas Metcalf Laboratory School is an external organization.

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F

Facility – a room or grouping of rooms, such as Stevenson Hall 420B or Fairchild 211. For the purpose of scheduling, it can be treated as a single entity or as multiple rooms/components.

Facility Characteristics – a description of the facility capacity, availability, and room characteristics.

FDD (Functional Design Document) – a document created by Illinois State that discusses the technical and functional needs of interfaces, conversions, reports, workflows, and customizations required for Campus Solutions.

Fee Class – a category of charges, such as "Tuition" or "Miscellaneous Fees." Although it is a required value in some components, fee class has no system impact and is only used for reporting purposes. (Student Financials)

FERPA (Family Educational Rights and Privacy Act) – a federal law that protects the privacy of student educational records. Students may choose to release information to others, such as their parents or legal guardians.

FERPA Control – a tool to identify and prohibit the release of a student's restricted information. This control is automated in Campus Solutions based on security role.

Flat File – a file that contains plain text data, such as an Excel spreadsheet. Flat files can be uploaded into Campus Solutions, which will automatically structure the file contents into the Campus Solutions database.

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G

General Ledger - the master account list that Illinois State University uses to track course fees, payments, financial aid disbursements, refunds, and other financial transactions. Illinois State uses Datatel for its general ledger. (Student Financials)

GL Interface (General Ledger Interface) - the application that posts Student Financials transactions to the general ledger. (Student Financials, Student Records)

Group Post – an application that posts multiple transactions into students' accounts at once. The transactions can be for the same student or for multiple students. (Student Financials)

Group Types – the labels that Campus Solutions uses to classify different types of transactions for group posting, such as *Financial Aid*, *State of Illinois E-Pay*, or *Housing* transactions. (Student Financials)

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H

Holiday Schedules – the schedule of academic holidays for Illinois State University. Holiday schedules are assigned to academic careers and are used for class scheduling purposes.

HRMS (Human Resources Management System) – the Campus Solutions system that manages human resource activities, such as payroll.

I

Invoice ID Number – the unique number assigned to every bill that Illinois State University issues. The number is a combination of two text strings defined by Student Accounts and a ten-digit number generated by Campus Solutions. (Student Financials)

Invoice Layout – the set of rules that determines how a bill will look when it is printed, including the order of the transactions on the bill, the level of detail of the transactions, and the XML template that governs the actual appearance of the text, images, margins, etc. (Student Financials)

Item Type – a kind of transaction in Campus Solutions, such as a charge, payment, refund, waiver, etc. Every transaction is recorded using item types. (Student Financials)

Item Type Group – a set of item types that are grouped together for more flexible processing. For example, housing and dining charge item types can be put into one item type group and used in processes together. (Student Financials)

Item Type Tree – a graphical hierarchy that displays the relationships among all of the item types that Illinois State University uses. (Student Financials)

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M

Message Category – a group of billing messages, such as all *Student* or *Organization* messages. All billing messages must have a message category. (Student Financials)

Modules – the applications which comprise Campus Solutions. The six core modules are Admissions, Advising, Campus Community, Financial Aid, Student Financials, and Student Records.

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N

National ID – a government-issued identification number. For example, citizens of the United States are issued Social Security numbers.

Node – the structural points that exists on a tree in Campus Solutions Tree Manager. Nodes join together to represent the hierarchal relationships among data, such the academic structure of Illinois State University or the item types defined in Student Financials.

O

Oracle – the technology corporation that maintains and provides support for the Campus Solutions software.

Origin – a source of charges or payments, such as a bank, the Office of Parking and Transportation, or the Financial Aid Office. Campus Solutions uses origins to determine where transactions are coming from when a group of accounting entries is posted to the general ledger. (Student Financials)

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P

Page – a screen in which data is entered and/or displayed. Pages let users view, change, or add data. For example, a student has several pages in their Student Service Center, such as one page for addresses, one page for bio/demo data, etc.

Payment Applier - the process that applies unallocated payments to a student's account without posting a new transaction. For example, if a credit card payment did not apply to the correct charges during the initial post, the payment applier can correct the error without reversing and then reposting the transaction. (Student Financials)

Payment Plan - a contract that allows a student to pay his/her charges over a period of time, rather than paying the full amount on the due date. Payment plans are identical to Illinois State University's installment plans. There are three types of payment plans in Campus Solutions. (Student Financials)

- **Calculated** payment plans adjust based on changes in the student's charges. For example, if a student enters the payment plan with 17 hours of coursework and then drops 5 hours, the payment plan will adjust to reflect the lower total charges. Calculated plans can also be restricted to only pay for certain item type groups, such as tuition and fees. These are the only types of plans Illinois State uses.
- **Existing** payment plans allow an administrator to select specific charges to include in the student's plan. These charges do not adjust automatically.
- **Lump Sum** payment plans simply specify a dollar amount that will be split up evenly over all installments. The lump sum can be all or part of a student's total charges. It does not adjust automatically.

Payment Overall Priority – the rules that determine what charges will be paid first when a payment does not cover the full amount of a bill. For example, tuition charges are paid before housing charges. Used in conjunction with the charge priority list. (Student Financials)

PeopleBooks – the extensive help documentation created by Oracle that explains Campus Solutions concepts, administration, and use. PeopleBooks is available from any page of Campus Solutions by clicking the *Help* link.

PeopleSoft – the system which serves as the foundation of Campus Solutions. The PeopleSoft system is designed to share data from a single location and provide a common source of information for all staff members and departments.

PeopleTools – a comprehensive development suite for PeopleSoft applications. PeopleTools allows developers to create and customize applications.

Pivot Date – the starting date that Campus Solutions uses to determine when a bill is due. Due dates are calculated by the number of days from the pivot date, such as 30 days after the *Term Start Date* or 15 days before the *Session Start Date* (which would be specified by a negative number, such as -15). The actual, numerical date of the pivot is set by Student Records. (Student Financials)

Plan Types - the different kinds of academic plans. Illinois State has several different plan types, such as major, minor, plan of study (often used by students pursuing professional certificates), and preparation (often used by those enrolled in the MDI and ELI programs, or dual enrolled in Illinois State and a high school).

Process – a set of actions that Campus Solutions executes according to specified parameters, such as adding batches of students to the Campus Community database, calculating tuition for multiple students, or updating checklist items.

Program Status – the relationship a student has with an academic program, such as applicant, active, admitted, cancelled, or waitlisted.

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Q

Query – a selective search of the Campus Solutions database for one or many records based on defined criteria. University staff members are granted access to run queries based on their role, and only key roles have the permission to create new queries.

R

Reason In – a code that specifies why a past-due item is being moved into the collections process, such as *Past Due Account*. (Student Financials)

Reason Out – a code that specifies why a past-due item is being moved out of the collections process, such as *Account Paid in Full*. (Student Financials)

RightNow – the CRM tool that is integrated with Campus Solutions to provide a single view of all communication with a student, prospective student, or other interested person. RightNow is used to recruit new students to Illinois State through email communications, events, and analytics.

Role-Based Security – the security for pages, menu items, and actions, controlled by giving access to users based on the roles designated in Campus Solutions. For example, employees in Financial Aid at Illinois State will only have access to the Student Records data they need to do their jobs.

Room Characteristics – a description of the components offered in a room, such as an overhead projector, a white board, or the number of computers in a lab.

Row – a container for the data for a particular table. Because of the way Campus Solutions structures data, row data is rarely overridden or deleted. Instead, when changes to a record need to be made, a new row is added with a new effective date. This maintains the historical record of data and tells the system to use the new data from that date forward.

Run Control ID – a unique name associated with every process that is run in Campus Solutions. Run Control IDs make it easier to repeat processes without having to reenter all of the relevant parameters.

S

SACR (Student Administration and Contributor Relations) – the tool that allows administrators to establish the framework that manages all other modules within Campus Solutions. For example, SACR controls the academic calendar, programs, plans, some security.

Search/Match – the Campus Solutions process that searches for and identifies potential duplicate records in the database.

Service Indicators – the flags that provide or limit services and access to a user. There are two types of service indicators.

- **Negative Service Indicators** create holds that prevent the user from receiving specified services, such as registration for classes or library privileges.
- **Positive Service Indicators** designate special services that are extended to the user, such as front-of-line course registration or special services for disabled students.

Single Signon – the ability to access other Campus Solutions applications without reentering a user ID or password after first-time authentication.

SIS (Student Information System) – a software application that manages student data. Campus Solutions is the new SIS for Illinois State.

SQL (Structured Query Language) – a programming language designed for managing data in a database. SQL can be used to create queries and run processes within Campus Solutions.

Student Financials – the Campus Solutions module that manages student receivables, billing, and collections. The module is used to calculate fees and tuition, create bills, set up payment plans, issue refunds, process collections, and print tax forms.

Student Group – a set of similar students, such as first-generation college students, that are grouped together either for reporting purposes or for processes such as tuition calculation or class enrollment.

Student Records – the Campus Solutions module that manages all academic information of current and former students. It contains the course catalog and schedule of classes, and it processes class enrollment, overrides, and grading, among other things.

Student Service Center – the self-service web portal that provides students with a single entry point to their academic information, advisement reports, student account balance, holds, to-do list, etc. The Student Service Center can be accessed at go.illinoisstate.edu.

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T

Target Keys – the codes that cashiers use in order to apply a payment to a student's account. (Student Financials)

Template ID – the XML file that determines the actual appearance of the text, images, margins, etc. on a bill. The template ID is one part of the invoice layout. (Student Financials)

Tender Keys – the types of payment that a cashier will accept, such as cash, checks, or debit cards. (Student Financials)

Term Code – A four-digit code associated with an academic term. Term codes are formatted as 2BBC, where BB refers to the last two digits of the second half of the academic year, and C refers to the specific term code (2 for fall, 5 for spring, 8 for summer). For example:

- 2152 – Fall term of the 2014-2015 academic year
- 2155 – Spring term of the 2014-2015 academic year
- 2158 – Summer term of the 2014-2015 academic year
- 2162 – Fall term of the 2015-2016 academic year, etc.

Term Fees – the fees that are charged based on the number of hours a student is enrolled in, such as tuition and general fees. (Student Financials)

Third-Party Contract – an agreement between an external organization and Illinois State University in which the organization is expected to pay for a student's expenses. For example, Illinois State bills *College Illinois!* for the expenses of students who are enrolled in *College Illinois!* plans. (Student Financials)

Tree – a graphical hierarchy that displays relationships among pieces of data within Campus Solutions. For example, there is a tree that defines the relationships among all the Illinois State University units and departments, and another tree that defines item types.

Tuition Group – a set of students who are all charged according to the same term fee rules and rates. Students are assigned to a tuition group based on their academic career and the term in which they are admitted. (Student Financials)

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U

UAT (User Acceptance Testing) – a testing phase conducted to determine if the requirements of a contract are met by a given software or service. Illinois State will choose various functional department members to conduct UAT on Campus Solutions.

Unit Testing – a testing phase conducted to determine if Campus Solutions modules, processes, and applications are fit for use. Unit testing will be conducted by project team members at Illinois State.

UPK (User Productivity Kit) – an online tutorial program that delivers self-paced, computer-based simulation training and interactive tutorials. Illinois State offers UPKs for Campus Solutions as part of a larger training plan.

User Defaults – a group of default values that Campus Solutions will automatically load on relevant pages, saving time and minimizing data entry errors. For example, the default value for the academic institution is *ILSTU*, for Illinois State University.

V

<u>Valid Cashier</u> – a person who is authorized to accept payments and process other transactions at a cashier's office. Valid cashiers must be linked to the valid registers at which they accept payments. (Student Financials)

<u>Valid Register</u> – a cash drawer that is authorized to process transactions at a cashier's office. Valid registers must be linked to valid cashiers in order for them to be used. (Student Financials)

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W

Waiver – an offset of term fee charges, in whole or in part. For example, many graduate assistants at Illinois State University receive tuition waivers. (Student Financials)

Wash Period - a certain number of days after the start of a term or session. During the wash period, a student may drop and add classes without penalty, as long as the actions cause no change in the total amount the student owes. Classes that are dropped outside of the wash period are refunded at a prorated amount. (Student Financials)

- **Transaction Wash Period** is the number of days that a student has within the wash period in order to complete the drop and add process. If the transaction wash period is 5 days, for example, the student can drop a class Monday and add another on Friday without penalty.

Wildcard – a character – usually the percent sign [%] or the underscore sign [_] – that is used to stand in place of unknown values or to indicate a range of values. For example, if you are searching for all students whose last name ends in son, you can enter `%son` in the *Last Name* search field.

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