

# **Clearing a Student with Active Terms for Graduation**

SA - Graduation

Please use the following process for students who will need to have their Spring/Summer terms inactivated and ensure that assessed fees for future terms are zero before awarding their degree.

If the degree is awarded before these fees are cleared, you will first need to request the convocation office to remove the awarded degree and the completion row. Once this is completed, you will have to change the term activation back to full-time, refresh the fees, change the term-activation back to 'N' and refresh the fees so that no future fees are on the students account. It will then be necessary to re-add the completion row on the student's record and re-award their degree.

The following steps will explain the process of clearing fees from a student account for graduation.

**Note:** If the degree has not yet been awarded and you are inactivating the terms before awarding the degree, please skip to step 16.

- 1. Click the **Records and Enrollment** link. Records and Enrollment
- 2. Click the Student Term Information link. Student Term Information
- 3. Click the Term Activate a Student link. Term Activate a Student
- 4. Enter the student ID number or Last Name and First Name and press Enter or Search. Note: For FOIP reasons some information has been removed.

#### Click the **Search** button.

Search Term Activate a Student Enter any information you have and click Search. Leave fields blank for a list of all values Find an Existing Value Search Criteria begins with 🗸 ID: Campus ID: begins with V National ID: begins with V Last Name: begins with V First Name: begins with V Case Sensitive Clear Basic Search 🖉 Save Search Criteria Search 



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5. From Term Activation click View All to see all instances of the students previous term activation.

### Click the View All link.

View Al

Find View All First 1 of 2		ternal St <u>u</u> dy	Exte	ntrol Dates	Term Co	Terms In Residence	Student Session	Enrollment Limit	erm Activation
Find View All First 3 1 of 2				<u> </u>	$\star$				$\smile$
Academic Carport Creduate Programs	2 🕑 Last	First 🕚 1 of	/ All	Find View					
Academic Career. Graduate Frograms Career Not Active					Active	Career Not	ograms	Graduate Pr	Academic Caree

6. Scroll down to further expand the Terms. Click the View All link.



7. Note that the Academic Load for Spring 2163 (P16) is set to No Units. This must be set to Full Time so that the student fees for the term are activated. The fees must first be activated to allow the system to reset.

Click the **Lookup** button.

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Academic Institution: UCALG Term: 2163 Student Career Nbr: 0 Override All Academic Levels: Override Projected Level: Academic Level - Projected:	<ul> <li>University of Calgary</li> <li>P16 Units</li> <li>Medicine Medical Doctor</li> </ul>	Activation Date: Academic Year: Load Determination:	2016/04/01 2016 Default
Term:       2163 (         Student Career Nbr:       0 (         Override All Academic Levels:       0         Override Projected Level:       0         Academic Level - Projected:       0	P16 Units Medicine Medical Doctor	Activation Date: Academic Year: Load Determination:	2016/04/01 2016 Default
Student Career Nbr:       0         Override All Academic Levels:       0         Override Projected Level:       0         Academic Level - Projected:       0	Medicine Medical Doctor	Academic Year: Load Determination:	2016 Default
Override All Academic Levels:		Academic Year: Load Determination:	2016 Default
Override Projected Level:		Load Determination:	Default
Academic Level - Projected:			
	Year 3	*Form of Study:	Other 🗸
Academic Level - Term Start:	Year 3	Academic Load:	N 🔍 No Units
Academic Level - Term End:	Year 3	*Billing Career:	MED 🔍
Level Determination: Terms		Eligible To Enroll:	$\checkmark$



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#### 8. Click the **Full-Time** link.

Full-Time

Look Up	×
	Help
Set ID: UCALG	
Academic Level Rule: MDMD	
Term Category: Intersess	ion Term
Academic Load: = 🗸	~
Look Up Clear Cancel Basic Lo	pokup
Search Results View 100 First () 1-3 of 3 () Last	
Academic Load	
No Units	
Part-Time	

9. Scroll down and press save.

Click the **Save** button.

10. Since you will return to this Term Activation window later, navigate via New Window to Student Financials.

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Click the **New Window** link.

New Window

- 11. Click the Main Menu link. Main Menu
- 12. Click the **Student Financials** menu.
- 13. Click the View Customer Accounts menu.

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14. The student ID number should carry over from the previous window. Press Enter or Search. Click the **Search** button.

Search

15. Note the balance for Gen Fees and Late Fees. These must be cleared before the student can graduate.

usiness Unit:	UCALG							
		ID:			Academic I	nformation	*	
otal:		Antic	ipated Aid: 0.	.00				
					Find   View A	All 💦 First 🕚 1-	-7 of 1	9 🕑 La
Account Typ	e Account Number	1	Balance	Open Date	Status			
Gen Fees	GENFEE001 - Winter 2016		0.00 CAD	2015/05/29	Active	Account Details		9 💬
Tuition	TUITION001 - Winter 2016		0.00	2015/05/29	Active	Account Details	<u>8</u>	9 💬
Gen Fees	GENFEE001 - Fall 2015		0.00	2015/05/29	Active	Account Details	<u>k</u>	9 💬
Gen Fees	GENFEE001 - Spring 2016		165.90	2016/04/04	4 Active	Account Details	<u>k</u>	9 💬
Late Fees	LATEFEE001 - Spring 2016		.49	2016/06/03	1 Active	Account Details	<b>1</b>	9 💬

16. If the degree has not yet been awarded and you are inactivating the terms before awarding the degree, please begin here.

Return to the Term Activate window, click the Term Activate a Student tab.

🕘 Term A...

17. Scroll down to the correct Term (e.g. 2163 Spring 2016) and change the academic load from **Full Time** to **No Units** to clear the finances.

Click the **Look up** button.



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#### 18. Click the **No Units** link.

No Units

Look Up		×
		Help
Set ID:	UCALG	
Academic Level Rule:	MDMD	
Term Category:	Intersession Term	
Academic Load: = 🗸		~
Look Up Clear Cancel Search Results View 100 First (1-3 of 3 ) Las Academic Load Full-Time No Units Part-Time	Basic Lookup	.::

- 19. Click the **Save** button.
- 20. Return to the Student Financial page. Click the **View Customer Accounts Tab**.

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21. Note that the Gen Fees = 0 and the late charges still remain. You will need to contact student receivables to have the late fee removed. The account can be cleared even with a late charge.

If there were any late fees (e.g. \$0.49) Student Financials must be contacted. Please visit <u>ucalgary.ca/finance/student</u> for assistance. Once the fee is reversed, or if the student paid any of their assessed fees in error, the student will have a credit posted to their account for which they can request a refund.

Fall 2015

Customer /	Accounts					_	_
Business Unit:	UCALG						
Medora,Roberta	Marie	ID:	10060694	Academic Inf	ormation	*	
Total:	0.00	Anticipated Aid:	0.00				
			F	Find   View All	First 🕙 1	-7 of 19	🕑 Last
Account Type	Account Number	Balance	Open Date	Status			
Gen Fees	GENFEE001 - Spring 2016	0.00 CA	0 2016/05/29	Active A	Account Details	<b>1</b>	] 💬
Tuition	TUITION001 - Spring 2016	0.00	2016/05/29	Active A	Account Details	M 🛙	] 💬
Gen Fees	GENFEE001 - Fall 2015	0.00	2015/05/29	Active A	Account Details	M 🛙	] 💬
Tuition	TUITION001 - Fall 2015	0.00	2015/05/29	Active A	Account Details	<b>1</b>	] 💬
Excess	EXC001 - Spring 2015	0.00	2015/05/13	Active A	Account Details	<u>1</u>	] 💬
Gen Fees	GENFEE001 - Spring 2015	0.00	2015/02/17	Active A	Account Details	<u>k</u>	] 🖗
Tuition	TUITION001 - Spring 2015	0.00	2015/02/17	Active A	Account Details	<b>1</b>	9 💬
Go to: Detail	Frans Item Summary Items by Term	Items by Date	Due Charges	Payment	Plans Admis	sion De	eposits

- 22. The completion row and degree awarded have to be re-added to the student record under **Student Program/Plan**
- 23. Please inform the Convocation Office (<u>convinfo@ucalgary.ca</u>) when complete so that they can run a final process (Program Completion Lockout).

### End of Procedure.

This completes the lesson on Clearing Students for Graduation. For the corresponding online learning, consult www.ucalgary.ca/ittraining