

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.*

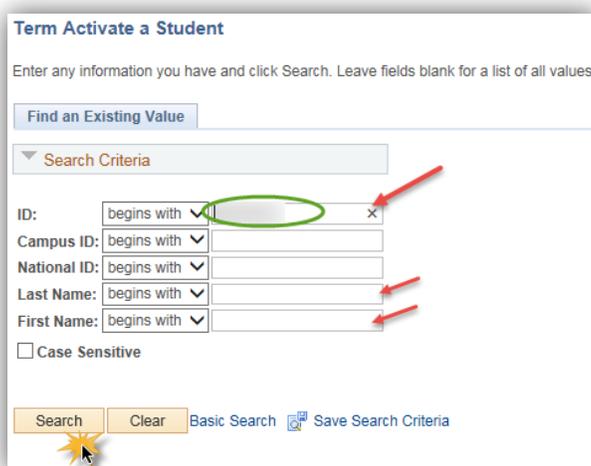
1. Click the **Records and Enrollment** link.

2. Click the **Student Term Information** link.

3. Click the **Term Activate a Student** link.

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.



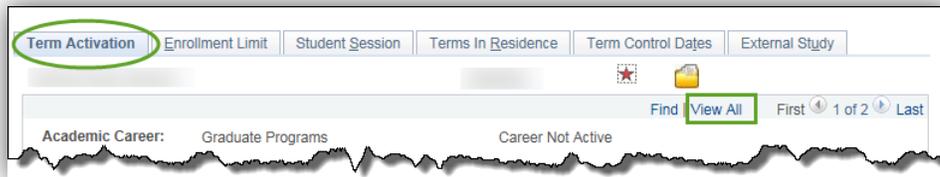
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- From Term Activation click View All to see all instances of the students previous term activation.

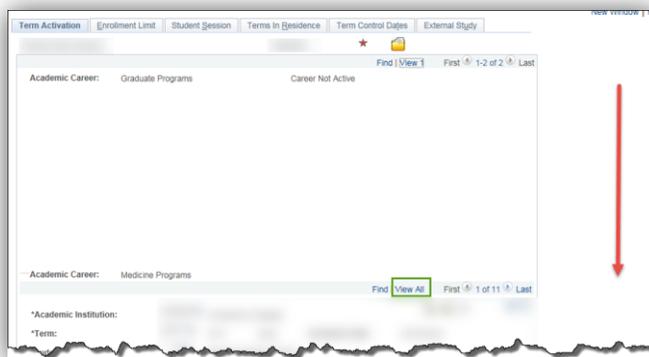
Click the **View All** link.

[View All](#)



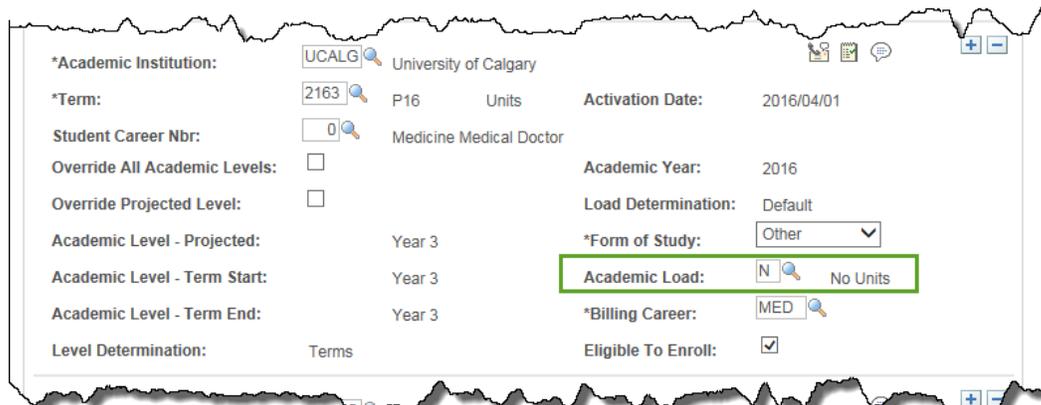
- Scroll down to further expand the Terms. Click the **View All** link.

[View All](#)



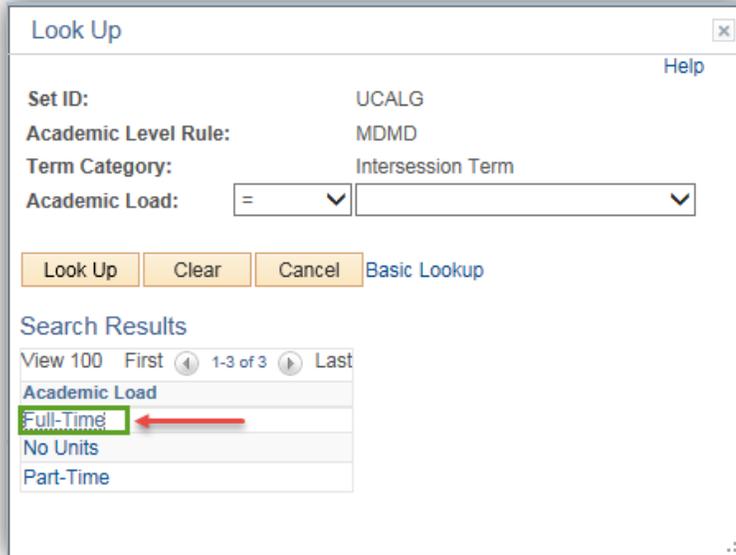
- Note that the Academic Load for Spring 2163 (P16) is set to No Units. This must be set to Full Time so that the student fees for the term are activated. The fees must first be activated to allow the system to reset.

Click the **Lookup** button.



*Academic Institution:	UCALG University of Calgary	Activation Date:	2016/04/01
*Term:	2163 P16 Units	Academic Year:	2016
Student Career Nbr:	0 Medicine Medical Doctor	Load Determination:	Default
Override All Academic Levels:	<input type="checkbox"/>	*Form of Study:	Other
Override Projected Level:	<input type="checkbox"/>	Academic Load:	No Units
Academic Level - Projected:	Year 3	*Billing Career:	MED
Academic Level - Term Start:	Year 3	Eligible To Enroll:	<input checked="" type="checkbox"/>
Academic Level - Term End:	Year 3		
Level Determination:	Terms		

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



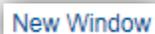
9. Scroll down and press save.

Click the **Save** button.

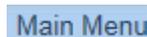


10. Since you will return to this Term Activation window later, navigate via New Window to Student Financials.

Click the **New Window** link.



11. Click the **Main Menu** link.



12. Click the **Student Financials** menu.



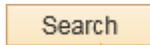
13. Click the **View Customer Accounts** menu.



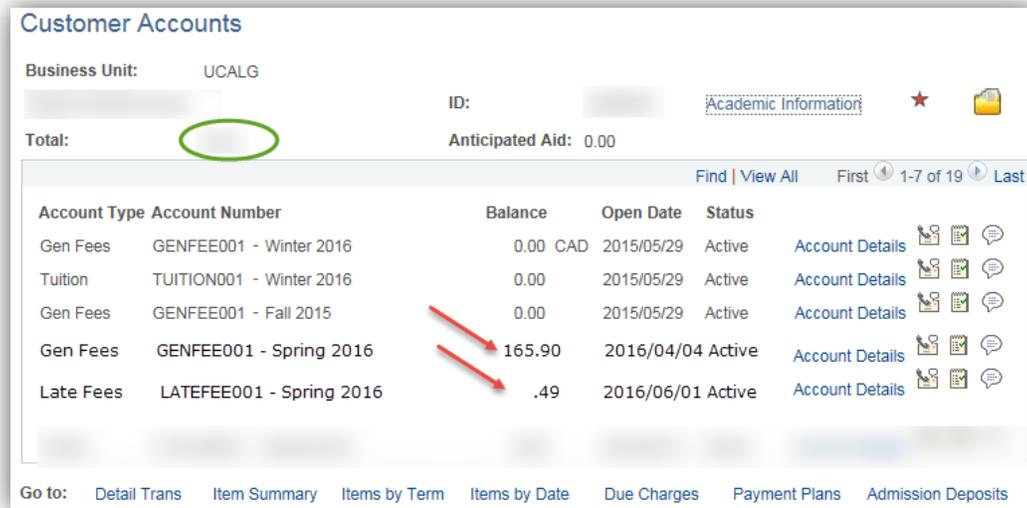
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14. The student ID number should carry over from the previous window. Press Enter or Search. Click the **Search** button.



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



Account Type	Account Number	Balance	Open Date	Status	
Gen Fees	GENFEE001 - Winter 2016	0.00 CAD	2015/05/29	Active	Account Details
Tuition	TUITION001 - Winter 2016	0.00	2015/05/29	Active	Account Details
Gen Fees	GENFEE001 - Fall 2015	0.00	2015/05/29	Active	Account Details
Gen Fees	GENFEE001 - Spring 2016	165.90	2016/04/04	Active	Account Details
Late Fees	LATEFEE001 - Spring 2016	.49	2016/06/01	Active	Account Details

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.



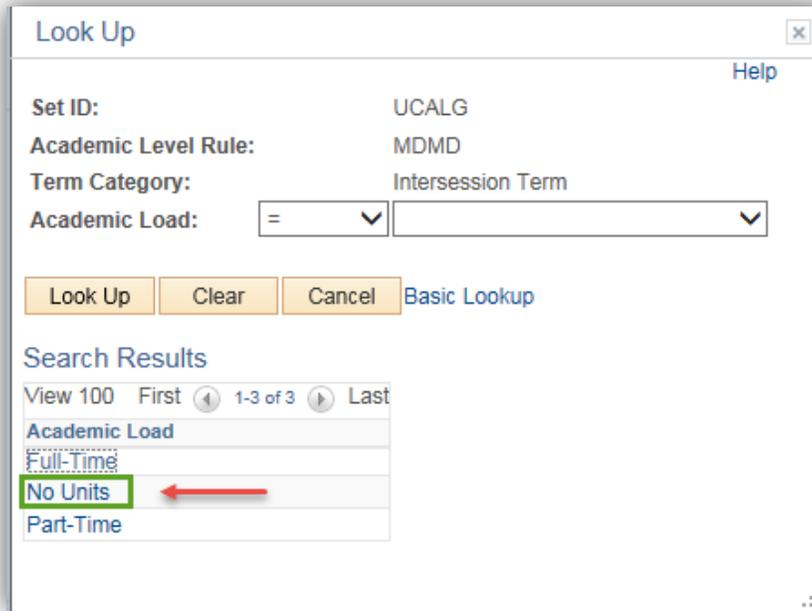
17. Scroll down to the correct Term (e.g. 2163 Spring 2016) and change the academic load from **Full Time** to **No Units** to clear the finances.

Click the **Look up** button.



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 Basic Lookup

Search Results

View 100 First 1-3 of 3 Last

Academic Load

Full-Time

No Units

Part-Time

19. Click the **Save** button.

Save

20. Return to the Student Financial page.
Click the **View Customer Accounts Tab**.

View Cu...

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- 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 ucalgary.ca/finance/student 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

Account Type	Account Number	Balance	Open Date	Status	
Gen Fees	GENFEE001 - Spring 2016	0.00 CAD	2016/05/29	Active	Account Details
Tuition	TUITION001 - Spring 2016	0.00	2016/05/29	Active	Account Details
Gen Fees	GENFEE001 - Fall 2015	0.00	2015/05/29	Active	Account Details
Tuition	TUITION001 - Fall 2015	0.00	2015/05/29	Active	Account Details
Excess	EXC001 - Spring 2015	0.00	2015/05/13	Active	Account Details
Gen Fees	GENFEE001 - Spring 2015	0.00	2015/02/17	Active	Account Details
Tuition	TUITION001 - Spring 2015	0.00	2015/02/17	Active	Account Details

- The completion row and degree awarded have to be re-added to the student record under **Student Program/Plan**
- Please inform the Convocation Office (convinfo@ucalgary.ca) 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