

Graduate Student Group Checklist

The following checklist has been created to assist you with understanding Student Groups.

Student Groups component

Records and Enrollment > Career and Program Information > Student Groups:

- Check the effective date for the waiver.
The effective date **MUST** be prior to the term start date; for instance use September 1st for Fall, January 1st for Winter, May 1st for Spring and July 1st for Summer.
- Status
'Active' means the fees are being waived.

'Inactive' means the student is no longer being waived the fee and normal fees are assessed.

Note: If no Inactive date is set, the waiver will continue into future terms.

Student Financials > View Customer Accounts:

- Check whether the fee was assessed automatically by the system. Student Groups can be used to waive a fee only if the fee assessment is automatic.
- Check whether the fee assessment was manually posted. If so, the fee must be waived manually. A student group waiver of a manual assessment will not waive the fee.

Student Financials > View Customer Accounts > Detail Trans Link > Item Description Tab (Find Item Type) > Item Detail Tab

(If Action QCK listed for relevant Item Nbr of Item Type, this charge has been manually posted. TUI listed means the fee was automatically calculated by the system.)

- Check whether fees are assessed.
- Check whether another source of funding (scholarship, loan, etc) or the student has paid for the student group item (undergrad donation, Upass, etc). If so, the waiver will have no fees to waive because all fees have been paid and the balance owing is zero. Student groups must be added **prior** to fees being paid by the student or another source of revenue paying the student group waiver fee (undergrad donation, etc).

Student Groups Checklist

Graduate

SA – Student Groups



Records and Enrollment:

- Check the student's 'Status'. The status should be 'Active'.
Note: student may have a 'Load' but may have withdrawn. Check to ensure the student is 'current'.
Records and Enrollment > Career and Program Information > Student Program/Plan > Student Program
- Check the student's 'Load'. This is required in order for the group to know how much to waive.
Note: Full and Part-time load is automatically calculated by the system.
Records and Enrollment > Student Term Information > Term Activate a Student > Term Activation
- Check the Form of Study. Form of Study should be 'Other' for students enrolled in the graduate career.
Records and Enrollment > Student Term Information > Term Activate a Student > Term Activation
- Check whether tuition being waived are Supplementary Course Fees. Supplementary Course Fees should never be waived; this is U of C policy.
Student Financials > Check Customer Accounts
- Check whether a Full-time load exists and a Form of Study of 'Other' exists for Health and Dental Waivers.
Note: Health and Dental waivers are two separate waivers.
Records and Enrollment > Student Term Information > Term Activate a Student > Term Activation
- Check the student's fees
Notes: Checking the Customer Account causes the fee to be assessed. Normally, fees are recalculated the end of the business day. Fees are also recalculated when the student checks their fees.
Student Financials > Check Customer Accounts