

Student Groups Checklist Undergrad

SA – Student Groups

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 and the waiver is processed **prior** to the student or other revenue source paying the general fee. Student groups must be added prior to fees being paid by the student or another source of revenue.
- Check whether another source of funding or the student has paid for the fee. If so, the waiver will have no fees to waive because all fees have been paid and the balance owing is zero.

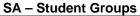
Records and Enrollment:

□ 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Note: student may have a 'Load' but may have withdrawn.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

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□ 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. Student should be Enrollment for students enrolled in the undergraduate career.

Records and Enrollment > Student Term Information > Term Activate a Student > Term Activation

□ Check whether fees 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 Enrollment 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

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