

Business Process Procedures

**9.15 SET UP NEW THIRD PARTY CONTRACT**

**Overview** These procedures walk an operator through the step-by-step process of creating a new third party contract.

When a student is linked to a third party contract, a credit is applied to a student's account and the student's sponsoring organization is sent a bill for the amount of the credit. Thus, students will not be financially responsible for the portion of tuition and fees that are covered by the third party contract.

**Key Points** The process of setting up a contract defines the terms of the contract within the VCCS SIS. If the contract will only pay for a defined set of courses you must use the course list functionality. (See 9.10 Set up Course List.)

**Navigation** [Home](#) > [Student Financials](#) > [Payment Plans](#) > [Create Third Party Contract](#)

**Detailed Directions**

**Step 1** Navigate to the Third Party Contract page. The following dialog box appears.

**Third Party Contract**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Business Unit:** =  NV280

**Contract Number:** begins with

**External Org ID:** begins with

**Description:** begins with

**Contract Status:** =  Active

**Contact Nbr:** =

**External Contract Number:** begins with

Case Sensitive

[Basic Search](#) 
[Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

**Step 2**

Click [Add a New Value](#) . The following dialog window appears.

Enter a contract number using the following naming convention:

YYYYTTLLLLXXXXXXXXXXXXXXXXXX

Where:

YYYY = term (2072)

TT = two letter designation for career (i.e. CR for credit, CE for Con Ed)

LLL(L) = length of class. (i.e. 16WK, 08WK, 10DY -- for 10 days, 04WD -- for 4 weekends, EL for ELI, ALL for all sessions, etc.)

XXX.. = 15 available letters for external organization's name and/or other information (16 letters will be available if the length of class is ALL)

Examples:

2034CR16WKNAVYPENSACOLA

2034CE10DYMITRE

2034CR16ELNANNYDIMENSIONS

2092CEALLMYCAA1



**Note**

To ensure all students are attached to the proper contracts, you must adhere to this contract naming convention. You may not make up any other name that does not follow the directions above.

**Step 3**

Click [Add](#) . The following page appears.

Enter the information as listed below.


Field	Description/Instructions
Description	Enter Company Name, and Campus (ex : ABC-ANBO).
Long Description	Enter a more detailed description (Optional).
External Org ID	Enter the appropriate ID number or click  to lookup.
Status	Active
Contract Priority	Accept the default of 999999.
Contact	If you previously set up a contact name for this organization, enter number or click  to lookup.
Ext. Contract	Enter the campus number associated with the campus setting up the contract.
Contract Max	Enter the maximum amount that can be charged to the contract.(ex: 999999)
Student Max	Enter the maximum amount that the contract will cover for any one student.
Charge Tree	Accept the default of CHARGE_PRIORITY.
Last Date	Select a date in the far future (like 12/31/25) to represent the last date this contract may have activity. Make sure the date is far enough in the future as to allow for changes, updates and other accounts receivable related activity.
Delivery Code	Enter the date the contract is set up and initials of the responsible person.  <b>08/2009 Update: Please use the 2 letter identifier, followed by the date and initials of the responsible party. For example: AL 08/10/09 KV.</b>
Requisition Number	This is a free text field that you may use to record any additional information about the contract.


**Step 4**


Click on the [Third Party Item Types](#) tab at the top of the page. The following page appears.


[Third Party Contract](#)
[Third Party Item Types](#)
[Third Party Charges](#)


**Business Unit:** NV280


**Account Type:**  


**Charge Item Type:**  

**Discount Item Type:**  

**Credit Account Type:**  

**Credit Item Type:**  


**Contract Type:**  

**Term:**  

**Start Date:**

**Course List:**

**Contract Number:** 2064CRALLWKTESTV89

**Date Type:**  

**Academic Year:**

**End Date:**

[Third Party Contract](#) | [Third Party Item Types](#) | [Third Party Charges](#)

**9.15 SET UP THIRD PARTY CONTRACT**

Enter the information as listed as listed below.

<b>Field</b>	<b>Description/Instructions</b>
Account Type	TPC
Charge Item Type	000001900000 TPC Sponsored Tuition and Fees
Discount Item Type	<b>DO NOT USE.</b>
Credit Account Type	Credit classes =TUT CE classes = NCR
Credit Item Type	It is possible for a student to have both a third party contract and financial aid covering tuition costs. Choose the most appropriate item type for the situation.  000002000000 Defer Third Party/FA First 000002000100 Defer Third Party/FA Last
Contract Type	Generally, the contract will be set up for a Specific Term, but it is possible that you may also choose Specific Course or Specific Course List.  DO NOT choose Specific Year or Period because choosing a contract length that spans more than one semester may lead to contracting and invoicing problems.
Date Type	This field becomes available when the TP type is Specific Year or Period.
Term	This field becomes available when the TP type is Specific Term. Choose the proper term.
Start Date	This field becomes available when the TP type is Specific Year or Period.
End Date	This field becomes available when the TP type is Specific Year or Period. If an End Date is necessary, enter a date far enough in the future (like 12/31/25) that you will always be able to go back and modify the contract (adding new students, removing students, changing maximum dollar amounts, etc.)
Academic Year	Leave this field blank
Course List	This field becomes available when the TP type is Specific Course List. If the contract will only cover specific courses, you must first set up a course list, and then relate the course list number to the third party contract by populating the Course List field.

**Step 5**

Click on the **Third Party Charges** tab at the top of the page. The following page appears.

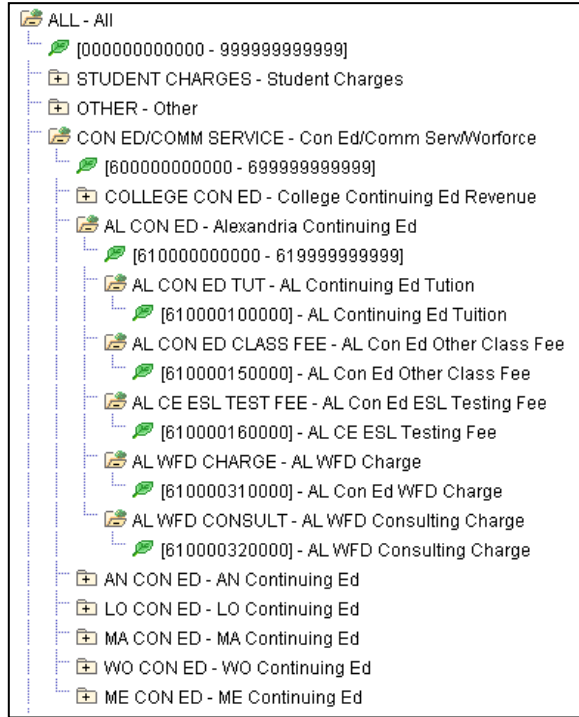
**Note**

Current testing has shown that, in order for charges to be paid in the order the college desires, this page must be set up so that fees are listed first, and tuition is listed last. For example: If the contract will cover in-state tuition, student activity fee and technology fee, then the lines on the Third Party Charges page must be inserted in this order:

Line #	Credit In-State	Credit Out-State	CE/WFD
1	STUDENT ACT FEE (or TECH FEE)	STUDENT ACT FEE (or TECH FEE)	Node covering materials, book, licensing fees, etc.  Example: AN CON ED CLASS FEE
2	TECH FEE (or STUDENT ACT FEE)	TECH FEE (or STUDENT ACT FEE)	CE Tuition  Example: AN CON ED TUT
3	I/S TUITION	CAPITAL FEE	
4		O/S or CONTRACT TUITION	

**CE Notes**

In order to choose the appropriate Tree Node for the Third Party Charges page, it is important to understand the hierarchy of charges as defined in the CHARGE\_PRIORITY tree. The screen shot shows the specific tree nodes for AL CON ED, however similar values have been set up for each campus.



For example, if you choose to insert AL CON ED, it will cover all charges associated with Item Type numbers between 610000100000 and 619999999999:

- AL CON ED TUT (610000100000)
- AL CON ED CLASS FEE (610000150000)
- AL CE ESL TEST FEE (610000160000)
- AL WFD CHARGE (610000310000)
- AL WFD CONSULT (610000320000)

If you choose to insert AL CON ED TUT, it will only cover charges to Item Type 610000100000. The same is true for the other nodes at the same level within the tree – AN CON ED CLASS FEE will only cover charges to Item Type 610000150000, etc.

**Step 6**

Following the order described above, enter the information as listed below for each charge you wish to have covered by this contract. Click  to insert an additional row for the next charge covered by this contract. Continue inserting rows until all lines for each applicable charge have been inserted.

Field	Description/Instructions
Item Type Group	Leave this field blank
Line #1	Line numbers will default as you insert additional lines.
Tree Node	Using the order described in above, enter the proper values:

**9.15 SET UP THIRD PARTY CONTRACT**

	(Examples) STUDENT ACT FEE TECH FEE CAPITAL FEE I/S TUITION O/S TUITION CONTRACT TUITION AN CON ED CLASS FEE AN CON ED TUT
Maximum Amount	Enter the maximum amount of charges covered from this tree node.
Charge %	Enter the appropriate % of the charges that will be posted to the employer's account. For most contracts, this value will be 100%
Charge Item Type	Accept the Charge Item Type default. This should be the same as the one listed on the Third Party Item Type panel.
Discount	DO NOT USE.
Discount Item Type	DO NOT USE.
Tax Item	Leave this field blank
Include Tax	Leave this field blank

**Step 7**

Click  Save .