

### Business Process Procedures

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## 9.20 ATTACH STUDENT TO CONTRACT

**Overview** These procedures walk an operator through the step-by-step process of attaching a student to a third party contract.

**Key Points** These procedures allow operators to adjust the student max for each student (only to an amount less than the contract student max) as well as attach a specific course lists to each student.

If necessary, please refer to 9.10 Set up Course List and/or 9.15 Set up New Third Party Contract for more information.

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

### Detailed Directions

**Step 1** Navigate to Third Party Contract page. A dialog box appears.

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

**Find an Existing Value**

**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

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

**Step 2** Enter **NV280** as the Business Unit.

Enter the contract number and click [Search](#). If the contract number is not known, there are several ways to retrieve it:

1. Click  on the **Contract Number** field to lookup.
2. Enter as much of the contract number as is known in the **Contract Number** field and click [Search](#) to view all contracts meeting that criteria. When the search results are displayed, click the hyperlink for the appropriate contract name.
3. Enter the **External Org ID** and click [Search](#). When the search results are displayed, click the hyperlink for the appropriate contract name.

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**Step 3** The Third Party Contract page appears.

### Third Party Contract

<b>Business Unit:</b> NV280	<b>Contract Number:</b> 2062CESRCIT
<b>External Org ID:</b> 5000597	<b>Status:</b> Active
<b>Date Type:</b> Term Year	<b>Contract Maximum:</b> 999,999.00 USD
<b>Term:</b> 2062 2006 Spring	<b>Acad Year:</b>
<b>Start Date:</b>	<b>End Date:</b>

Find | View All    First 1-3 of 26 Last

ID	Student Max	Status	Priority
<b>Reference Number</b> <input type="text" value="0353243"/> Keegan, Margaret M	<input type="text" value="244.00"/> USD	<input type="text" value="Active"/>	<input type="text" value="999999"/> <span style="background-color: yellow; padding: 2px;">Post</span>
<input type="text" value="0383795"/> Kaplan, Martin L	<input type="text" value="800.00"/>	<input type="text" value="Active"/>	<input type="text" value="999999"/> <span style="background-color: yellow; padding: 2px;">Post</span>
<input type="text" value="0387414"/> Alexander, Charlotte A	<input type="text" value="224.94"/>	<input type="text" value="Cancelled"/>	<input type="text" value="999999"/> <span style="background-color: yellow; padding: 2px;">Post</span>

[Corp Accounts](#)

Save
Return to Search
Previous in List
Next in List
Notify
Refresh

Enter the information as listed below.

Field	Description/Instruction
ID	Enter the student's EmplID.
Student Max	Enter the maximum amount the contract will cover for this particular student. If the amount defaults to the dollar amount set as the student max on the Third Party Contract, you may edit the figure to a lesser amount.
Status	Active.  <b>Note: Once a student has been posted to the contract the operator may not make any changes to the contract without first "inactivating" the student.</b> Once the changes have been made to the contract, the operator may re-activate and post the student to the contract and check their record for accuracy.
Priority	Accept the Priority default of 999999.
Reference (optional)	This is a free form text field that you may use to record additional information about the student, such as purchase order number.
Course List	If the student is covered by a course list specific to him/her, choose the course list number from the drop down menu.

**Step 4** Click Post to post the contract to the student's record.

**Step 5** Click + to insert rows to attach additional students to the same contract. Repeat Step 5 above for each new student added.


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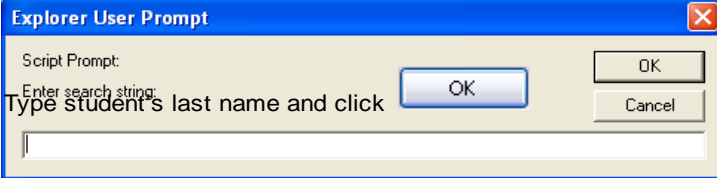
### Step 6

Click  .


### Notes

Use the  on the dark blue bar   1 of 2  to navigate to the appropriate student.

If you have inserted a long list of students and you find it necessary to locate the row for a specific student, click , and the following prompt will appear:



The dialog box is titled "Explorer User Prompt" and has a close button (X) in the top right corner. It contains a "Script Prompt:" label, a text input field, and three buttons: "OK", "Cancel", and "OK". The text "Enter search string:" is positioned above the input field. The text "Type student's last name and click" is overlaid on the left side of the dialog box.

Enter the student's EmplID or last name and click  to search.