

Business Process Procedures

9.35 SPECIAL CONTRACT – ORG PAYS %

Overview These procedures walk an operator through the step by step process of setting up a Third Party Contract to cover charges for out-of-state students who are eligible for a state-approved contract tuition rate, where the third party pays only a percentage of the tuition and fee charges.

Key Points The discount functionality delivered with the system does not work as it was designed. Therefore, operators must use these procedures to achieve the desired discount rates.

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Detailed Directions

Step 1 Navigate to Create Third Party Contract. Refer to 9.15 Set up New Third Party Contract for more detailed directions

Step 2 Enter all of the valid values required for the Third Party Contract page.

Step 3 Enter all of the valid values required for the Third Party Item Type page.

Step 4 Navigate to Third Party Charges page.

The screenshot displays the 'Third Party Charges' page. At the top, there are tabs for 'Third Party Contract', 'Third Party Item Types', and 'Third Party Charges'. The 'Business Unit' is set to 'NV280' and the 'Contract Number' is '2063CRALLWKTESTV89'. Below this is the 'Offset Charge Info' section, which includes an 'Item Type Group' search field and 'Term From' and 'Term To' date pickers. The main area is a table with the following columns: 'Line#', 'Tree Node', 'Max Amount', 'Charge %', 'Discount %', 'Charge Item Type', 'Discount Item Type', and 'Tax Item Type'. The first row contains '1' in the 'Line#' column and 'USD' in the 'Charge %' column. There are search icons for 'Tree Node', 'Charge Item Type', and 'Discount Item Type'. An 'Include Tax' checkbox is present below the table. At the bottom of the page, there are buttons for 'Save', 'Refresh', 'Add', and 'Update, Display'. The footer shows the navigation path: 'Third Party Contract | Third Party Item Types | Third Party Charges'.


Step 5 In this example the External Org will pay for 75% of the student tuition and fees and will also obtain the contract rate.

Note **CURRENT TESTING HAS SHOWN THAT, IN ORDER FOR CHARGES TO BE PAID IN THE ORDER WE DESIRE, WE MUST SET UP THIS PANEL SO THAT FEES COME FIRST (Line #1, 2, 3, etc.) AND TUITION IS LAST.**

Line #1 STUDENT ACT FEE
 Line #2 TECH FEE
 Line #3 CAPITAL FEE
 Line #4 CONTRACT TUITION

Following the order described in the **Note** above, for each charge you wish to have covered by this contract, enter the information as listed below.

Field	Description/Instructions
Item Type Group	Leave this field blank
Line #1	Line numbers will default as you insert additional lines.
Tree Node	Refer to the Note in Step 5 above.
Maximum Amount	Enter the maximum amount of charges covered from this tree node.
Charge %	Enter the percentage covered by the contract. For this example, enter: 75
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 Type	Leave this field blank
Include Tax	Leave this field blank

Click  to insert an additional row for the next charge covered by this contract. Repeat this step for each charge covered by the contract.

Step 7 Click .

Step 8 Refer to 9.25 Attach Student to Contract to complete the next step in the contracting process.