Create a New Term Fee

Purpose: Use this document as a reference for updating tuition charges for Student Financials in ctcLink.

Audience: Student Financials staff.

> ❗ You must have at least one of these local college managed security roles:
>
> - ZD SACR SF All Config
> - ZD SACR SF Local Config
> - ZZ SACR SF Charges Fees Config
>
>   If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Creating a Term Fee

Term Fee Codes Tab

Navigation: Set Up SACR > Product Related > Student Financials > Tuition and Fees > Term Fees

1. The Term Fees search page displays.
2. Select the **Add a New Value** tab.
3. Enter or search for the **SetID**.
4. Enter the **Term Fee Code** and then select the **Add** button.

> 💡 Maximum six (6) character limit for Term Fee Code. Please avoid the use of anything that begins with the letter 'S'.

5. The Term Fee Codes tab displays.
6. Select the **Status** drop-down and select **Active**.
7. Enter a description of the Term Fee in the **Description** field. The maximum character limit is 30.
8. Enter a longer description in the **Long Description** field. The maximum character limit is 254.

9. Select the **Charge By** drop-down and select:
   A. **Charge By Class:** Not typically used. Reach out to SBCTC for further guidance.
   B. **Charge By Session:** Not typically used. Reach out to SBCTC for further guidance.
   C. **Charge By Term:** Typically the default for all Term Fees.

10. Select the **Use** drop-down menu and select:
    A. **Anticipated Units:** Not currently utilized.
    B. **Billing Units:** This is the default for all Term Fees.

11. Select or search for the **Fee Class**. Populate with **MAN**.
12. Select the **Term Fees** tab.

Video Tutorial

The video below demonstrates the process actions described in steps listed above. There is no audio included with this video. Select the play button to start the video.

Video Tutorial via Panopto

View the external link to Term Fee Codes Tab. This link will open in a new tab/ window.

Term Fees Tab

13. The Term Fees tab displays.
14. Enter or search for the **Term**.
15. Enter or search for the **Account Type**.
16. Enter or search for the **Item Type**.
17. Select either the:
    A. **Use Criteria** checkbox:
       i. There are two options for utilizing this checkbox:
          a. Option #1: Select the Use Criteria checkbox and leave Fee Trigger field blank.
          b. Option #2: Select the Use Criteria checkbox and enter or search the appropriate Criteria from the **Fee Trigger** field.

    B. **Use Equation** checkbox: Please reach out to SBCTC for further guidance/assistance.

18. Enter or search for the **Adjustment Code** and **Due Date Code**.
19. *Optional:* Enter the **Minimum/Maximum Fee Code**.

20. Enter the **Minimum Amount** and the **Maximum Amount** if you have defined amounts. If not, leave blank. Once the Term Fee is saved, it will auto populate with the default min/max amounts.
21. *Optional:*
    A. Select the:
        i. Charge for Wait Listed Class: When selected, this Term Fee will incorporate wait-listed units into it's calculation.
        ii. Track Class pricing: Not in use.
        iii. Exclude Classes w/ HECS Status: Not in use.
22. Select the Term Sub Fee Codes tab.

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Term Sub Fee Codes

23. The Term Sub Fee Codes page displays.
24. *Optional:* Select the Track Sub Fees checkbox: Not in use.
25. The Sub Fee Code should automatically populate with the same code you entered on Step 4 above.
26. Select the **Calculation Option 1** drop-down and select:
    A. **All Matching Rows:** This is recommended. The system assesses the term sub fee against all criteria that match the checkboxes selected in the following step #29.
    B. **Most Descriptive Row:** The system assesses the term sub fee against criteria the most similarly match the checkboxes selected in the following step #29.
27. Select the **Calculation Option 2** drop-down and select:
    A. **Against All Enrollment Units:** The system charges the student the term sub fee against all billing units.
    B. **Against Meet Criteria Units:** This is recommended. The system charges the student the term sub fee against only the courses that match the criteria in Calculation Option 1.
28. *Optional:* Enter the **Minimum Amount** and **Maximum Amount**.

29. *Optional:*
    A. Select the:
        i. Career Specific checkbox: Allows the Term Fee to charge only to specified careers.
        ii. Group Specific checkbox: Allows the Term Fee to charge only to specified academic groups.
        iii. Subject Specific checkbox: Allows the Term Fee to charge only to specified subjects.
        iv. Campus Specific checkbox: Allows the Term Fee to charge only to specified campuses.
        v. Location Specific checkbox: Allows the Term Fee to charge only to specified locations.
        vi. Instruction Mode Specific checkbox: Allows the Term Fee to charge only to specified instruction modes.
        vii. Program Specific checkbox: Allows the Term Fee to charge only to specified programs.
        viii. Cohort Year Specific checkbox: Allows the Term Fee to charge only to specified cohort years.
30. Select the Term Sub Fees tab

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Term Sub Fees

31. The Term Sub Fees page displays.
32. *Optional:*
    A. Select the:
        i. Audit Rate specified checkbox: Not in use. Please reach out to SBCTC for further guidance/assistance.
        ii. Audit calculated separately: Not in use. Please reach out to SBCTC for further guidance/assistance.
33. Enter or search for the **Institution**.
34. If utilizing the **Term Sub Fee Codes** specific checkboxes (step 29 above), enter that into the appropriate corresponding field.

35. Enter the **Unit From** and **To** fields. The **Unit From** field should be above zero. It is recommended to start with 0.10 in the **Unit From** field.
36. If utilizing an equation, enter in the **Fee Amt Equation**. Reach out to SBCTC for further guidance/assistance.
37. Enter the:
    A. **Amount/Unit:** Specified amount to be charged for every billing unit that the student is enrolled.
    B. **Flat Amount:** Specified amount to be charged that fall within the specified Unit From and To range.
    C. **Amount/Unit (Audit):** Not in use. Reach out to SBCTC for further guidance/assistance.
    D. **Flat Amount (Audit):** Not in use. Reach out to SBCTC for further guidance/assistance.
    E. **Surcharge Effective Unit:** To include a surcharge when students enroll for more than a specified number of academic units, enter the threshold number in this field.
       • For example, to apply a surcharge to students who are enrolled in more than 15 units, enter 15.
    F. **Amount/Unit (Surcharge):** Specified amount to be charged for every billing unit above the **Surcharge Effective Unit**.
       • For example, if the the **Surcharge Effective Unit** is set to 10, the **Amount/Unit (Surcharge)** will begin to apply on the 11th unit.
    G. **Flat Amount (Surcharge):** Specified amount to be charged for billing units above the **Surcharge Effective Unit**.
       • For example, if the the **Surcharge Effective Unit** is set to 10, the **Flat Amount (Surcharge)** will begin to apply on the 11th unit.
38. Select the **Add a New Row [+]** button if there are additional ranges of **Units From** and **To**.
    A. Example: There is a $5 per unit charge for the first 10 credits and then goes to a $10 surcharge per credit above 10. **Unit From** would be 0.10 and **To** would be 9.99. The second row would have **Unit From** set at 10 and **To** would be 999. There would be a $5 **Amount/Unit** charge for first row and second row would have $50 in the **Flat Amount** field, **Surcharge Effective Unit** of 10, and the **Amount/Unit Surcharge** of $10.
39. Select the Term Fee Residency tab.

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View the external link to **Term Sub Fees Tab**. This link will open in a new tab/window.

Term Fee Residency

40. The Term Fee Residency page displays.
41. *Optional:*
     A. Enter the:
         i.   Minimum Amount: Not in use. Reach out to SBCTC for further guidance/assistance.
         ii. Maximum Amount: Not in use. Reach out to SBCTC for further guidance/assistance.
         iii. Tuition Residency: Not in use. Reach out to SBCTC for further guidance/assistance.

42. Select the **Save** button.
43. Section complete.

⚠ You must now add the new Term Fee to the Tuition Groups.

Add Term Fee to Tuition Groups

Tuition Groups

Navigation: Set Up SACR > Product Related > Student Financials > Tuition and Fees > Tuition Groups

44. The Tuition Groups Find an Existing Value search page displays.
45. Enter the **Business Unit** and select the **Search** button.
46. Select the appropriate Tuition Group link.
47. The Tuition Groups Definition tab displays.
48. Select the **Add a New Row [+]** button to add a new effective dated row. The new effective date needs to be on or before the start of the term that the new Term Fee takes effect. The new effective dated row also needs to be at least one day after the start of the previous term.
49. Select the Term Fees tab.
50. The Term Fees tab displays.
51. Select the **Add a New Row [+]** button to add a new row.
52. Under the **Fee Code** column, enter or search for the new **Term Fee** created.
53. Select the **Include in Withdrawal Calc** checkbox on the new row you created.

- Note: If your new Term Fee does not follow the STD calendar, you may leave this box unchecked.

54. *Optional:*
   A. Select the **Waivers** link on the new row you created and:
      i. Enter or search for the **Waiver Code** that will waive this new Term Fee.
      ii. Enter the **Priority number**.
      iii. Select the **Add a New Row [+]** button to add more Waiver Codes.
      iv. Select the **OK** button.

55. Select the **Save** button.
56. Process complete.

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View the external link to Tuition Groups Update. This link will open in a new tab/ window.