College: Fee Schedule Manual

Version 2.1
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1 Introduction

The purpose of this manual is to provide information and the process steps for viewing the fee schedule, locating specific students, raising queries, viewing responses; locating fee schedule snapshots and running the student loans company report.

1.1 Intended Audience

This manual is intended for college bursary, treasurer, fee, finance or accounts staff who use the fee schedule.

1.2 Pre-requisites

- Knowledge of the fee schedule processes at the University
- Basic web browser knowledge
- Basic knowledge of using a computer, keyboard and mouse

1.3 Objectives

On completion of this manual you will be able to:

- Search for specific students
- Export, print and copy search results
- Raise a fee schedule query
- View amended information
- View additional student information
- View central funding information
- View fee schedule snapshots
- Run the student loans company report

1.4 Conventions

- Indicates additional useful information.
- Indicates an important piece of information, take particular care to read this information.
- Indicates there is something that you should not do, take particular care to read this information.

**Bold Text** Indicates menu names.

**Italic Text** Indicates window, screen or dialogue box titles.

[F4] Keys on your keyboard are indicated in **bold text** enclosed in square brackets [ ].

File > Open Moves through a navigation path are indicated with a >. In this case you would click on the File menu, then select Open.
2 Login and Logout of eVision

To access the Quick Reference Guide with instructions on how to login and logout of eVision, please enter the URL below or use the following link and select “Access and Navigate eVision” under the eVision link.

https://www1.admin.ox.ac.uk/studentsystems/support/guides/

3 The Fee Schedule Process

From week 5 of Hilary term 2015 the process of checking, querying and confirming student fees will be changed. A spreadsheet of student fees will no longer be emailed in week 5 of each term for the purpose of college staff to check student fees. Instead the student fees will be available in eVision a maximum of 24 hours after the student has completed the ATR (applicant transfer) process or progression (continuing students) process. Note that eVision will show the student’s tuition fee but it may not show student funding information in the same time frame. This means the student’s net tuition fee liability may not be accurate until this funding information is available in eVision. The fees team will contact colleges informing them when the students’ tuition fees and funding are ready for review.

A spreadsheet of student tuition fees can be downloaded for the purposes of comparison against college records from the new fee schedule screens but it is a read only document.

College staff will use the data within eVision to check tuition fees and queries will be raised directly within eVision. The fees team will be checking the new fee schedule screens daily to deal with queries as they are raised. Details of amendments following a query will be entered directly into eVision by the fees team. College staff will be able to view those amendments. An email will also be sent to the college staff member who raised the query to notify them of the progress by the fees team.

The fee schedule static snapshot will be taken four times a year around week 5 of term plus a final end-of-year snapshot around the last week of July. These snapshots will continue to be used by central finance to reconcile monies between colleges and the University for the year.

The student loans company report provides a list of students with the funding information for graduate students. This includes details of how they are funding their studies. It is also possible to select an individual student from the report and view further details.

Any questions regarding the fee schedule process should be directed to the fees team at: fee.schedule@admin.ox.ac.uk.
4 Accessing the Fee Schedule Functionality

1) Click on the Fees and Funding link in the menu at the top of the screen to display the Fees and funding for staff screen.

4.1 Searching for Student(s)

1) Click on the Fee Schedule Task link to display the Fee Schedule Search Criteria screen.

2) Enter the required data:
   a) College (Only the college(s) you have access to will appear.)
   b) Academic Year

All other fields are optional but use is encouraged to return more precise search results.

Note: To download the search results see section 3.1.1 or to open the search results within eVision see section 3.1.2.
### 4.1.1 Downloading Search Results to Excel

1) Click on **Download report** to display the *Fee schedule download screen.*

2) Click on **Download report**.

3) Click ‘Yes’ to the file format warning message.

4) The search results open in Excel.
### 4.1.2 Viewing Search Results in eVision

1) From the Fee Schedule Search Criteria screen click on to display the Fee Schedule Search Results screen.
4.1.2.1  Refine Search Results

1)  Enter free text search criteria into the ‘Search’ textbox at the top right of the screen. The search results will automatically adjust according to the search criteria entered.

### Fee Schedule Search Results

<table>
<thead>
<tr>
<th>Fee Schedule Search Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>College</td>
</tr>
<tr>
<td>Academic Year</td>
</tr>
<tr>
<td>Report Created</td>
</tr>
</tbody>
</table>

### Search

- **Search:** amelia equal

### Table of Search Results

<table>
<thead>
<tr>
<th>Student Number</th>
<th>Student Name</th>
<th>Award Programme</th>
<th>Enrolment Status</th>
<th>Fee Status</th>
<th>Query Status</th>
<th>Original Calc'd Fee ($)</th>
<th>Proposed Fee ($)</th>
<th>Final Fee ($)</th>
<th>Fee Reduction ($)</th>
<th>Central Funding Total ($)</th>
<th>Agreed Not Fee Liability ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>621665</td>
<td>Aqua, Amelia</td>
<td>DPhil Economics</td>
<td>Enrolled</td>
<td>OV</td>
<td>N/A</td>
<td>14,415</td>
<td>14,415</td>
<td>14,415</td>
<td>0</td>
<td>0</td>
<td>14,415</td>
</tr>
</tbody>
</table>

Showing 1 to 1 of 1 entries (filtered from 651 total entries)

4.1.2.1.2  Copy Search Results

1)  Click on **Copy** to copy the table of search results.

### Table copied

Copied 1 row to the clipboard.
4.1.2.1.3  Save Search Results as an Excel File

1) Click on Excel.

2) A standard browser Save as dialogue box opens.

3) Select the location where you wish to save the search results re-name the file (if required) and click Save.

4.1.2.1.4  Print Search Results

1) Click on Print to display a print preview of the search results and use your browser’s functions to print.
2) Press Esc on your keyboard to return to the Fee Schedule Search Criteria screen.

4.1.3 Raising a Query

1) Select the radio button to the left of the student you wish to raise a query against, and click on Raise query.

2) The Raise College Fee Query screen opens.

3) Enter the required data:
   a) Amended fee proposed by college
   b) Adjustment reason
   c) College comments (this field is not mandatory but it is highly recommended that information is entered).

4) Click Submit.
4.1.4 Viewing Amended Information Against a Student

1) Select the radio button to the left of the student you wish to view and click on Amendment info.

2) The Fee Amendment Information screen opens in a new tab in your web browser.

3) To close it click Exit.
4.1.5 Viewing Student Information

1) Select the radio button to the left of the student whose student information you wish to view and click on **Student info**.

2) The Additional Student Information screen opens in a new tab in your web browser.
3) To close it, click **Exit**.

### 4.1.6 Viewing Central Funding Information

1) Select the radio button to the left of the student whose central funding information you wish to view and click on **Central funding info**.

2) The **Centrally Administered Funding Information** screen opens in a new tab in your web browser.

3) To close it, click **Exit**.
5 Accessing the Fee Schedule Snapshots

1) Click on the Fees and Funding link in the menu at the top of the screen to display the Fees and funding for staff screen.

2) Click on the Fee Schedule Snapshot link to display the Microsoft Reports Screen.

3) Select the relevant report parameters form the drop down lists and click on Run Report to display the Report Viewer: Viewing Fee Schedule screen.
6 Running the Student Loans Company Report

1) Click on the Fees and Funding link in the menu at the top of the screen to display the Fees and funding for staff screen.

2) Click on the Student Loan Company Report link to display the Microsoft Report Screen.
3) When selected a parameter option use the dynamic search box to filter the choices.

4) When selecting multiple parameter options untick ‘All’ or click ‘Uncheck All’ and then tick the check boxes next to the relevant options.
5) Click **Run Report** and your report will open in a new web browser tab.

6) Click on the relevant student’s SSN code to display further details relating to that student.
7) Click the back arrow to return to the original report.

6.1 Exporting the Student Loans Company Report

1) Select the format in which you wish to export the report from the drop down menu and click Export.

Note: Microsoft Excel is the optimal format in which to export a report. The first tab of the excel spreadsheet will display the University’s conditions for using student data, the second tab will show the report parameter and the third tab will display the report.
Student Data Management and Analysis: Conditions for ongoing use of data

For university and college staff in receipt of student and applicant data,
by receiving and opening electronic files containing student and applicant data, or by downloading the data from published reports and data views, you accept responsibility for the data and its security, and agree to comply with the Data Protection Act and with relevant University or college policies on data protection and information security.

In particular, you agree to the following.

A. Data that identifies individuals (i.e., that is personal data under the Data Protection Act)

1. Student data shall be used only to meet the collegiate University's educational, pastoral, statutory or administrative responsibilities and purposes, in accordance with the University or college student contract. Student data shall be used only to meet the collegiate University's educational, pastoral, statutory or administrative responsibilities and purposes, in accordance with the University or college student contract.

2. The data shall be kept secure and appropriate safeguards taken to ensure that it is not lost or disclosed to unauthorised persons. Unauthorised persons would include other members of the collegiate University who have no need to access the data in order to perform their duties.

3. If the data is downloaded to a mobile device (laptop, memory stick, tablet, smartphone) the device must be appropriately secured. Laptops and memory sticks may be used to store the data only if the device is encrypted.

Data Supply Conditions: Parameters

If the data file is amended, or it is held outside of the University for any reason, it must be

Student Loan Company Report - Microsoft Excel
7  Further Help & Information

7.1  Student Systems Support Centre (SSSC)

The Student Systems Support Centre (SSSC) provides guidance and assistance with the use of the University’s student systems and associated business processes. Guidance and further information about eVision can be found on the Student Systems Support Centre website:

http://www.admin.ox.ac.uk/studentsystems/

7.2  Education IT Programme (Edu IT)

The Education IT Programme (Edu IT) is responsible for delivering the development of Oxford’s IT-based systems used by academic and administrative staff, applicants and students in support of many aspects of teaching and learning. Further information about the programme can be found at:

http://www.admin.ox.ac.uk/aad/studentsystems/programme/

7.3  Data Protection

You should familiarise yourself with the University’s policy on Data Protection by reading the information available at:

http://www.admin.ox.ac.uk/councilsec/compliance/dataprotection/

Further information about the Data Protection Act can be obtained from the website of the University’s Data Protection Officer:

http://www.admin.ox.ac.uk/councilsec/compliance/dataprotection/policy/

All university members should adhere to the following regulations when using IT facilities:

http://www.admin.ox.ac.uk/statutes/regulations/196-052.shtml

7.4  Document Information

This document is subject to change, please ensure you have the latest version.

<table>
<thead>
<tr>
<th>Revision Date</th>
<th>Version</th>
<th>Summary of Changes</th>
<th>Author</th>
</tr>
</thead>
<tbody>
<tr>
<td>15 July 2014</td>
<td>0.2</td>
<td>Check by Dennis Burgin and Andrea Addison</td>
<td>Gillian Crosby</td>
</tr>
<tr>
<td>29 Oct 2014</td>
<td>0.3</td>
<td>Checked by Anna Best after adding Fee status explanations and the Student Loans Company Report</td>
<td>Gillian Crosby</td>
</tr>
<tr>
<td>30 Oct 2014</td>
<td>1.0</td>
<td>Signed off by Anna Best</td>
<td>Gillian Crosby</td>
</tr>
<tr>
<td>13 Feb 2015</td>
<td>1.7</td>
<td>Updated screenshots as Train2 updated with Live</td>
<td>Ian Quigley</td>
</tr>
<tr>
<td>23 Apr 2015</td>
<td>2.0</td>
<td>Updated Login and Logout details</td>
<td>Martin Eley</td>
</tr>
<tr>
<td>19 Dec 2016</td>
<td>2.1</td>
<td>Updated screens and fixed footer</td>
<td>Abi Taylor</td>
</tr>
</tbody>
</table>
## Appendix

<table>
<thead>
<tr>
<th>Query Status</th>
<th>Short Name</th>
<th>Summary of Changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>College Query Raised</td>
<td>CQR</td>
<td>This status will be assigned to a student when a query is raised by a college.</td>
</tr>
<tr>
<td>College Query Pending</td>
<td>CQP</td>
<td>The fees team will assign this status while they are investigating the query raised by a college or while they are waiting for changes to be made to the student's record which are causing the wrong fee to be calculated.</td>
</tr>
<tr>
<td>College Query Rejected</td>
<td>CQC</td>
<td>This status will be used by the fees team when it is believed that the current calculated fee is accurate and the suggested fee by the college is incorrect.</td>
</tr>
<tr>
<td>College Query Agreed – Record Amended</td>
<td>CQARA</td>
<td>The fees team will assign this status when the query raised by the college was correct but the fees were incorrect due to errors in the student or course data, which was used to calculate the student’s fee.</td>
</tr>
<tr>
<td>College Query Agreed – Fee Override</td>
<td>CQAFO</td>
<td>The fees team will assign this status when the query raised by the college was correct and the fees team need to manually re-calculate and enter the students correct fees for the current academic year.</td>
</tr>
<tr>
<td>Fees Team Update</td>
<td>FTU</td>
<td>This status will be used when fees team have overridden the calculated fee for a business reason. The fees team will manually re-calculate and enter the students correct fees for the current academic year.</td>
</tr>
</tbody>
</table>