WAIVING A LATE FEE

This manual also serves as a cross reference for understanding how to run processes through group post.

STEP 1: FOLLOW THE STEPS BELOW TO NAVIGATE TO THE “CREATE GROUP DATA ENTRIES” PAGE (MAIN MENU > STUDENT FINANCIALS > CHARGES AND PAYMENTS > GROUP PROCESSING > CREATE GROUP DATA ENTRIES)
NOTE: This page lands on the “Find an Existing Value Tab”, however, you will only use this tab if you want to view a group post that has already been initiated. If you do want to view an existing group post you can use the search fields on this tab. After you have entered in the search data, click “Search.”

If you need to begin a new group post process, click on the “Add a New Value” tab and continue on to step 2.
**STEP 2:** ON THE “ADD A NEW VALUE TAB”, ACCEPT THE DEFAULT VALUE OF “NEXT” FOR YOUR GROUP ID AND CLICK “ADD.”
STEP 3: ON THE “GROUP ENTRY” TAB, USE THE DROP-DOWN ARROW TO SELECT “WAIVER” AS YOUR GROUP TYPE.
**STEP 4:** Click on the spyglass located next to the “ORIGIN ID” field to pull up a list of selectable origin IDs.

**STEP 5:** Select “STUDENT FINANCIAL SERVICES” from the list.
**STEP 6:** NAVIGATE TO THE “GROUP LINE ENTRY” TAB.

**STEP 7:** TYPE IN THE STUDENT’S EMPLID IN THE “ID” FIELD.

**NOTE:** ONCE YOU TAB OUT OF THE “ID” FIELD, THE STUDENT’S NAME WILL APPEAR TO THE RIGHT, AND THE CURRENT ACCOUNT BALANCE WILL APPEAR BELOW. (THIS IS THE STUDENT’S BALANCE PRIOR TO THE WAIVER YOU ARE PROCESSING).
STEP 8: USE THE SPYGLASS LOCATED NEXT TO THE “ITEM TYPE” FIELD TO SELECT THE RELEVANT ITEM TYPE.

NOTE: IN THIS EXAMPLE, THE STUDENT IS RECEIVING A WAIVER FOR A LATE PAYMENT FEE, SO YOU WOULD WANT TO SELECT THE “LATE PAYMENT WAIVER.”
NOTE: ON THE “LOOK UP ITEM TYPE” PAGE THAT POPS UP AFTER CLICKING ON THE SPYGLASS, YOU ARE ABLE TO SEARCH FOR THE ITEM TYPE. THE BEST WAY TO SEARCH IS BY DESCRIPTION. YOU CAN CHANGE THE SEARCH CRITERIA TO “CONTAINS” AND TYPE IN “LATE” IN THE DESCRIPTION FIELD. THIS WILL PULL UP ALL ITEM TYPES THAT CONTAIN THE WORD “LATE” IN THE DESCRIPTION. CLICK “LOOK UP” TO RETRIEVE YOUR SEARCH.

Late Payment Waiver = 700000007005
Late Registration Waiver = 700000007000
STEP 9: TYPE “STU” INTO THE “ACCOUNT TYPE” FIELD.

NOTE: TO VIEW ALL ACCOUNT TYPE OPTIONS, CLICK ON THE SPYGLASS LOCATED NEXT TO THE “ACCOUNT TYPE” FIELD. THE OPTIONS ARE: STU, TPC, AND WOA.
STEP 10: ENTER THE DOLLAR AMOUNT OF THE WAIVER IN THE “AMOUNT” FIELD. THIS WILL BE A POSITIVE NUMBER.
**STEP 11:** ENTER THE RELEVANT TERM INTO THE “TERM” FIELD. THIS IS THE TERM IN WHICH THE CHARGE THAT YOU ARE WAIVING EXISTS.

**NOTE:** TO VIEW ALL TERM OPTIONS, CLICK ON THE SPYGLASS LOCATED NEXT TO THE “TERM” FIELD.
**STEP 12:** TO INPUT ANOTHER WAIVER, CLICK ON THE `+` ICON TO ADD ANOTHER RECORD.

**NOTE:** YOU CAN ADD AS MANY RECORDS AS NEEDED.
STEP 13: TO PULL UP THE ADDED RECORD, CLICK “VIEW ALL.”

NOTE: YOU SHOULD NOW HAVE “2 OF 2” RECORDS.
NOTE: THE HIGHLIGHTED DATA WILL POPULATE WITH THE DATA ENTERED IN FROM THE FIRST RECORD. MAKE CHANGES WHERE NECESSARY, REFERRING BACK TO STEPS 7 THROUGH 11. YOU CAN EITHER ADD ANOTHER WAIVER FOR THE SAME STUDENT OR A DIFFERENT STUDENT.
STEP 14: AFTER YOU HAVE ENTERED THE DATA FOR ALL RECORDS, CLICK “SAVE.”

NOTE: THE GROUP ID WILL BE LISTED AS “NEXT” UNTIL YOU CLICK “SAVE.”
**NOTE:** AFTER YOU CLICK “SAVE” THE GROUP ID WILL POPULATE WITH A NUMBER. YOU WILL NEED TO MAKE NOTE OF THIS NUMBER BECAUSE YOU WILL NEED IT WHEN YOU POST THE TRANSACTION (REFER TO STEP 23).
STEP 15: NAVIGATE BACK TO THE “GROUP ENTRY” TAB.

NOTE: THE TOTAL NUMBER OF ENTERED RECORDS AND DOLLAR AMOUNT WILL APPEAR IN THE “CONTROL TOTALS” SECTION.
**STEP 16:** Enter in the totals into the “Control Total” fields, matching the total numbers indicated.

**STEP 17:** Check the “Balance Group” box.

**NOTE:** After you enter in the totals, the “Difference” amount will change to “0.00.”
STEP 18: CLICK “SAVE.”

NOTE: AFTER YOU CLICK “SAVE” THE POSTING STATUS WILL CHANGE FROM “ERRORS” TO “INCOMPLETE.”
STEP 19: TO POST THE TRANSACTIONS, NAVIGATE TO THE “POST TRANSACTIONS” PAGE.
STEP 20: ON THE “FIND AND EXISTING VALUE” TAB, CLICK “SEARCH.”
**STEP 21:** SELECT ANY RUN CONTROL ID.

### Post Transactions

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

**Search Criteria**

- **Run Control ID:** begins with [Departmental_Billing]
- [ ] Case Sensitive

**Search Results**

<table>
<thead>
<tr>
<th>Run Control ID</th>
<th>Language Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Departmental_Billing</td>
<td>English</td>
</tr>
<tr>
<td>PMT_APPLIER</td>
<td>English</td>
</tr>
<tr>
<td>Panama_City_Close</td>
<td>English</td>
</tr>
<tr>
<td>Parking</td>
<td>English</td>
</tr>
</tbody>
</table>
**NOTE:** ON THE “POST TRANSACTIONS” PAGE, THE THREE FIELDS INDICATED BELOW MAY POPULATE WITH THE DATA FROM YOUR PREVIOUS TRANSACTION POST; IF SO, YOU WILL NEED TO DELETE THE DATA.
**STEP 22:** ENTER “Z” INTO THE “GROUP TYPE” FIELD OR CLICK ON THE SPYGLASS TO SELECT “WAIVER.”

**NOTE:** THE GROUP TYPE WILL NEED TO MATCH THE GROUP TYPE THAT YOU INDICATED ON THE “CREATE GROUP DATA ENTRIES” PAGE.
**STEP 23:** ENTER YOUR GROUP ID NUMBER INTO BOTH THE “STARTING GROUP ID” AND “ENDING GROUP ID” FIELDS.

**NOTE:** IF YOU HAVE A RANGE OF GROUP IDS TO POST, YOU WOULD ENTER THE FIRST NUMBER IN THAT RANGE INTO THE “STARTING GROUP ID” FIELD AND THE LAST NUMBER IN THAT RANGE INTO THE “ENDING GROUP ID” FIELD.

**STEP 24:** CLICK “RUN.”
**STEP 25:** On the “PROCESS SCHEDULER REQUEST” page, check the box in the “GROUP POST/CRM EIP” line.

**STEP 26:** Click “OK.”
**STEP 27:** CLICK ON THE “PROCESS MONITOR” HYPERLINK TO VIEW THE STATUS OF THE POST.
**STEP 28:** ON THE “PROCESS LIST” TAB, YOU WILL NEED TO CLICK “REFRESH” TO UPDATE THE STATUS.

**NOTE:** THE POSTING PROCESS IS NOT COMPLETE UNTIL IT IS LISTED AS “SUCCESS/POSTED.”

**NOTE:** YOU CAN NOW NAVIGATE TO THE STUDENT’S ACCOUNT ON THE “VIEW CUSTOMER ACCOUNTS” PAGE TO ENSURE THAT THE WAIVER HAS PROCESSED CORRECTLY.