MONASH University

Student Systems

User Guide

eAdmissions

Fee Waiver Functionality, Capturing Agent Details and Processing Manual Payments

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Contents

1 Fee Waiver and Manual Payments Functionality

The purpose of this document is to assist Callista users who will be required to

- process Fee Waivers for applications submitted both in hard copy and via the Applicant Portal,

- capture the agent details supplied by online applicants/agents

- process manual application fee payments submitted by online applicants.

The functionality consists of:-

- Promotional Fee Waiver Codes (production of promotional waive codes, redemption of these codes through applicant portal and manual keying, and monitoring/reporting of validations)

- Other Waive Code functionality (the ability for students to be waived automatically according to certain criteria

- Functionality to support capturing agent details and processing of manual payments.

1.1   Accessing the functionality

1.1.1 Callista Forms – Fee Waivers

The specific forms that support the processes for fee waivers, capturing agent details and manual payments by online applicants are as follows:

- EADF0006 Maintain Waive Usage Codes

- EADF0007 Request Fee Waive Code

- EADF0012 Maintain Waive Rule Types

- EADF0013 Maintain Waive Rules

- IASF0120 Fast Track Application

- EADF0014 Additional Applicant Data Form

From the Student Information System (SIS) main menu go to the Admissions menu. That menu contains the MIS Fast Track Application form.

The Admissions menu also contains the Applicant Portal Applicant Data folder: form EADF0014 is on the menu within that folder

The Admissions/Applicant Portal Applicant Data contains a folder Application Fee Waiver on which the other four forms appear.

1.1.2 Monash Reporting System – Reports

The following Fee Waiver report is available on the Admissions menu of the
Monash Reporting System, and is described in more detail in a later section of this
User Guide:-

- Admission Fee Waive Codes Report

2 Processes overview

1. Set up waive usage codes to enable the use of fee waivers issued at recruitment events – section 3.1.

2. Generate batches of Promotional Fee Waiver codes in a standard label format or as a csv file to enable their use in other formats – section 3.2.

3. [System Administrator only: set up additional Waive Rule Types to ensure automatic waiver of application fee for specific cohorts of applicants – section 4.1.]

4. Set up Administrative Fee Waiver codes to track the waiving of application fees by administrative staff – section 4.2.

5. When data-entering hard copy applications via Fast Track, record Promotional Fee Waiver codes or staff-authorised waivers of the application fee – section 5.

6. Check all online international applicants for agent details to ensure payment of agent commissions – section 6.1.

7. Before waiving the fee or processing a manual payment of the fee check whether online applicants have submitted their online application by accepting the conditions. If they haven't completed the acceptance step of the application, contact them to ask them to complete it. – section 6.2

8. Record decision to waive application fee for an online applicant by entering Administrative Fee Waiver code, and ask eAdmissions support team to change applicant to PENDING status so their application will be transferred to the Admissions module – section 6.3.

9. Record date when manual payment is received from an online applicant, and ask eAdmissions support team to change applicant to PENDING status so their application will be transferred to the Admissions module – section 6.4.

3 Promotional Fee Waiver Codes

This section describes the Fee Waiver Code functionality that is designed to support the promotional efforts of Recruitment staff. That is, these codes are given to potential applicants by recruiters (either directly or through an agent) as an incentive to apply through Monash, or as a reward for attending a Recruitment Fair or other marketing activity. The Fee Waiver Code functionality in this section refers to the production of "Promo"/Promotional Code functionality.

3.1   EADF0006 Maintain Waive Usage Codes

This form enables authorised Callista users to maintain Waive Usage Codes to support the promotional code creation functionality.

A Waive Usage Code needs to be established for each promotional activity undertaken at which promotional Waive Codes will be disseminated. It is recommended that these be set up on a yearly basis, in accordance with the recruitment and marketing calendar. For events that recur each year, using a code that is the same except for the year will make it easier to compare promo code usage.

A Waive Usage Code can be up to 15 characters long, a combination of alpha and numeric digits. A standard format has been established for the entering of activity data that forms the basis of wage usage codes, for example:-

AABBBBBBMMYY

AA = Two letter Country code (two country codes can be abbreviated for combined activity)

BBBBBB = Up to Six letter Activity standard abbreviation (see table below)

Activity	Standard Abbreviation
Agent Activity	**AGACT**
Agent Interview	**AGINT**
Conversion Activity	**CONV**
Exhibition	**EXHIB**
Fair	**FAIR**
Information Day	**INFODY**
Open Day	**OPDY**
Roadshow	**RDSHO**
Seminar	**SEM**

MM = Two numeric digit for Month

YY = Two numeric digit for Year

Please note – this combination can leave a few spare characters available in the Waive Usage code. These will be used where required to differentiate between similar activities across the recruitment calendar. It is not compulsory that codes be 15 characters.

3.2   EADF0007 Request Fee Waive Code

This form enables authorised Callista users to request/produce Fee Waive Codes (to be referred to as "Promo" Codes) to support the activities of recruitment staff and applicant incentives.

The form enables two options – you can produce Promo codes in .PDF that print down in a specified label format or you can choose to produce a set of Promo codes via a .csv list which can be used in merge letters or on other label templates or as a check-list.

Within form EADF0007:-

Qty - enter the Quantity of Promo codes that are required for the recruiter. This is capped at 500 promotional codes per request.

Prefix Id - enter up to a three digit Prefix Id. You should use the requesting Recruiter's initials for this field. Please note that this prefix id is the first three characters of the actual promotional codes provided to applicants, so should be appropriate to the purpose.

Issued to – enter the full name of the Recruiter/staff member who has requested the set of promo codes. This provides the ability to run reports and provide more info regarding statistical usage etc.

Valid From – Today's date is the default, but this field can be set as a future date (however, it cannot be backdated. This is due to promo code validations in the applicant portal).

Valid To – set to any valid future date, to limit the period following the recruitment activity during which the Waive Codes can be used. Applicants will not be able to have the fee waived by entering the Waive Code after the "Valid to" date has passed.

Usage Cd – select from the List of Values next to the field, to choose the appropriate Usage code. These codes should have been established for the promotional activities across the recruitment calendar. If an appropriate Usage Code is not listed, use form EADF0006 (see section 2.1 above) to add an appropriate code.

Output – the List of Values gives you a choice of two selections. **CSV** should be selected when you wish to get Promo codes on a .csv spreadsheet (for use in merge letters, different label templates etc). **Label** should be selected when you wish to produce a set of Promo codes in the agreed .pdf format which can be printed directly on to labels.

When CSV is selected, a .csv formatted file is produced, and saved directly to your c:/ drive. The file will not automatically open. The filename is saved in the **Comments** field of the appropriate request.

When Label is selected, a .pdf label formatted file is produced and will open in a new window. This can then be directly printed onto labels. The label format that was chosen will meet the following specifications:-

> **Avery** Mailing Labels "Address" Code: L7156
> (58 x 17.8mm); 45 to a page

Comments – Any free text comment can be added here – the team issuing the promo codes may like to consider establishing a standard format for any comments to be added.

When all fields have been populated, click on the **Generate** key to produce either the file or labels.

Once output has been created, you will see that the **Existing Waive Code Requests** block on the bottom half of the screen, now contains details of your promo code request. These details appear with the most recent requests at the top of the list. Requests should not be deleted, but in the case of producing promo codes in error, you can select the **Closed Ind** box, and this will ensure that the promo codes cannot be used or redeemed.

4 Waive Rule Codes

As discussed previously, Promo code functionality covers the production of codes for distribution to applicants to use directly. The Waive Rule Code functionality, on the other hand, is used for two main reasons:-

1. To allow internal Monash staff to add Waive Rule Codes to waive application fees for applications that are processed manually through the Fast Track form; and

2. To establish Waive Rules that will be validated against applicants automatically when they make applications through the on-line Applicant Portal that satisfy the rules that have been established against the Waive Rule Codes.

These dual purposes are met through the use of Waive Rule Types which are mapped to user-defined Waive Rule Codes.

4.1   EADF0012 Maintain Waive Rule Types

Waive Rule Type Codes within this form can only be modified or added by the Developers in the Systems team. These details cannot be altered or added directly by users.

This form is available only in Query mode to allow users to view the Waive Rule Type Code details (such as Short Description and Description (which is the actual rule associated with the Waive Rule Type Code).

Waive Rule Type Codes

ADMN-WAIVE There are no validations associated with ADMN-WAIVE code. This code is for use for keyed applications only. This Type should be used when creating Waive Rule Codes that will be used where staff wish to record that they have waived a fee under their authority, rather than according to a particular application type or credential.

ENR-WAIVE When a Waive Rule Code is mapped to this ENR-WAIVE type code, an applicant's application fee will be waived according to the rule text. That is, in this case, if the applicant has had a previous Monash Course Attempt (at any other status than UNCONFIRM in Callista), the applicant's application fee will be waived. This should only usually be mapped to a Waive Rule Code that is only available via the web (and would not usually used when keyed).

MUELC-APP This Rule Type Code has been established to allow applicants who are applying for a MUELC program to have their fees waived automatically, as long as this course code/program is the only preference of the application. That is, if the applicant applies for any course other than a MUELC program in their application, their fees will not be waived using this process.

DOM-APP This Rule Type Code has been established to allow domestic Australian applicants to have their application fee waived automatically.

INT-DE This Rule Type Code has been established to allow international applicants who are applying to study off campus to have their application fee waived automatically. That is, if the applicant has a system citizenship type equal to 'International' and all course preferences within the application have an attendance mode of 'EX' or 'MM', that applicant's application fee will be automatically waived.

SA-APP This Rule Type Code has been established to allow applicants who are applying to study at the South Africa campus to have their application fee waived automatically. That is, if all course preferences within the application have a location type equal to 'CAMPUS.OS' and a location code of 'SAFRICA' that applicant's application fee will be automatically waived.

Waive Rule Type Codes are maintained centrally within this form, but also have little impact until appropriate Waive Rule Codes are established in EADF0013. However Waive Rule Codes (established in EADF0012) have no functionality unless they are mapped to one of these system Waive Rule Type Codes.

4.2 EADF0013 Waive Rule Code Maintenance

Waive Rule Codes need to be established to define the situations in which application fees can be waived. These Waive Rule Codes are user defined, and a variety of codes can be established to meet the needs of the business.

> There are some codes that must always be in place in this form for the waive functionality to work and must not be deleted.

Waive Rule Code	Description	Valid From	Valid To	Web Avail	Keyed Avail	Waive Rule Type	Closed Ind
APRULECHK	APPLICANT PORTAL RULE CHECK	Date of entry	31/12/2099	Y	N	ENR-WAIVE	N
AP-WEB-1	DO NOT REMOVE – AP WAIVE ENROLMENT RULE CHECK	Date of entry	31/12/2099	Y	N	ENR-WAIVE	N
AP-WEB-2	DO NOT REMOVE – AP MUELC APPLICATION RULE CHECK	Date of entry	31/12/2099	Y	N	MUELC-APP	N
AP-WEB-3	DO NOT REMOVE – AP WAIVE DOMESTIC	Date of entry	31/12/2099	Y	Y	DOM-APP	N
AP-WEB-4	DO NOT REMOVE – AP WAIVE DISTANCE EDUCATION	Date of entry	31/12/2099	Y	N	INT-DE	N
AP-WEB-5	DO NOT REMOVE – AP WAIVE SOUTH AFRICA	Date of entry	31/12/2099	Y	N	SA-APP	N

Any number of Waive Rule Codes can be established to meet the needs of the business.

Waive Rule Code – A ten character user defined code. This forms the actual code that is entered into the Fast Track form or is used by the system to automatically waive a fee, based on the rule functions set within the relevant waive rule type codes. The format to use for this code is (for IRS codes) IRS-WVE+initials of staff member, or (for Sunway campus codes) SUN-WVE+initials of staff member.

Description – A description of the usage of the code.

Valid From date – This date cannot be earlier than the system date of entry of the code.

Valid To date – This date can be any date in the future. If a code is being established and it is expected the code will be in use for the foreseeable future, it is recommended that an end date of the xx/xx/2099 is added for this purpose.

Web Avail Indicator – Indicates whether the code should have functionality through the Web. That is, should students who fulfil the waive criteria have their application fee automatically waived when they apply online using the Applicant Portal? **Only enrolment waive codes set up by the eAdmissions Project Team should have this indicator ticked.**

Keyed Avail Indicator – Indicates if the code should be able to be entered when keying manual applications through the Fast Track form, or can be applied in the Applicant Additional Details form to transfer students who have not paid.

Waive Rule Type – Select the five waive rule typesADMIN-WAIVE. (The other five Waive Rule Types are used by the system automatically to waive the online application fee for cohorts applicants for whom the fee is not charged.)

Closed Indicator – Waive Rule Codes can be closed if you no longer want them available for selection or input.

5 Entering Fee Waivers in Fast Track

Promotional Fee Waiver Codes, or Administrative Fee Waiver Codes, can be recorded for hard copy applications entered via the Fast Track data-entry form.

Entering promo codes in Fast Track enables recruitment teams to track the effectiveness of recruitment activities where promo codes are provided to applicants, regardless of whether the applications are submitted online or in hard copy.

Recording Admin Waiver codes in Fast Track enables tracking of the waiving of the application fee by individual staff for audit purposes.
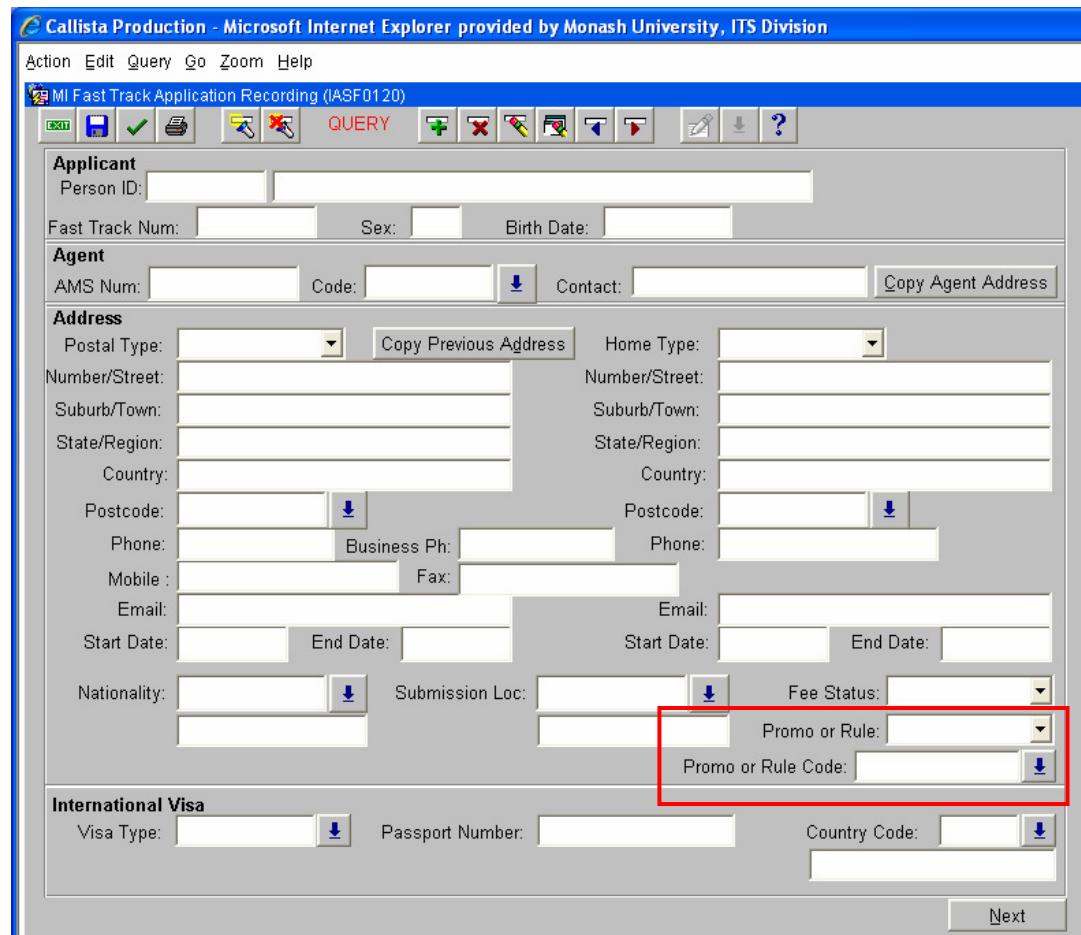
If you are entering a Promotional Fee Waiver Code:

1. In the field "Promo or Rule", select "Promo"

2. In the "Promo or Rule Code" field, enter the Promo code exactly as it appears on the application form.

If you are waiving the fee on your own authority or on the authority of the person who recorded the decision to waive the fee on the application form:

1. In the field "Promo or Rule", select "Rule"

2. From the list of values for the field "Promo or Rule Code", select the appropriate Waive Rule Code.

6 Processes using the EADF0014 Additional Applicant Data Form

The EADF0014 Additional Applicant Data Form displays data for any valid Applicant ID which has a corresponding Application Number. The form is used to:

- Identify whether online applicants/agents have recorded agent details for the application to ensure payment of the agent's commission, and

- Record decisions to waive the application fee for online applicants, and

- Record receipt of manual payment of the application fee for online applicants.

Before waiving the application fee for online applicants, or processing their manual payment of the application fee, it is necessary to check that they have in fact submitted their online application and agreed to the conditions of the application.

6.1   Capturing agent details

Online applicants or their agents can record agent details at step 4 of the online application.

For all cohorts of online applicant who may use a recruitment agent (who may in turn be entitled to a fee commission from the University), the application must be checked for agent details. If there are agent details, these must be transferred to whatever database is kept to ensure that agents receive their commission.

The agent details recorded for online applications appear in EADF0014: Agent Code, Agent Name (and branch), Agent Email, and Agent Staff Contact. There is unlikely to

be data in the Agent Code field, as agents do not tend to know their Monash agent code. The crucial piece of data is the Agent Name (and branch), from which you will have to identify the appropriate agent code.

6.2 Checking that online applicants have submitted their application

Sections 6.3 and 6.4 below explain the processes for waiving the application fee for an online applicant, and receiving a manual payment submitted by an online applicant. Before either of these processes can take place, you must use form ADMF5000 View Applicant Summary to check whether the applicant has in fact submitted their application.

Where the application transfer status is NON-APPLIC, the applicant has not completed the application to the point where they have accepted the application conditions. (These conditions include acceptance that, if the applicant has provided misleading information, the application or any resulting enrolment can be cancelled.) This is the online equivalent of a hard copy application that has not been signed by the applicant.

If an application is at NON-APPLIC status, the application fee cannot be paid or waived until the applicant has logged back into the application and accepted the conditions. It is necessary to contact the applicant and ask them to complete their application by accepting the conditions. The applicant's contact details can be found by clicking on the 'Applicant Details' button.

If the application is at PRE-PAY or WAIT-PAY status, the applicant accepted the conditions but did not complete payment of the application fee. In this case the fee can be waived or manual payment of the fee can be processed.

6.3 Recording a Fee Waiver for an online applicant

If the application is at PRE-PAY or WAIT-PAY status, and it is decided to waive the application fee, use the following process.

In EADF0014, in the "Promo or Rule?" field, select "Rule" for an Administrative Fee Waiver.

In the "Waive Code" field, select the Administrative Fee Waiver Code for the staff member waiving the fee and tab. The Waive Code will be validated, and a date will appear in this field.

email support-eadmissions@adm.monash.edu.au giving the Applicant ID, Application Number, and asking that the application be changed to PENDING status as the application fee has been waived.

6.4   Processing Manual Payments

If a manual payment of the application fee is received, use the following process.

1. If the manual payment does not give the Applicant ID and Application Number, use the Person Search button in ADMF5000 View Applicant Details to search for the applicant by name etc., to find out (a) whether the payment is in fact for an online application, and (b) if so, the Applicant ID and Application Number.

2. If the application is at PRE-PAY or WAIT-PAY status, and a manual payment is received, go to form EADF0014 and query on the Applicant ID

3. Enter the date the manual payment was received in the "Paid Date" field.

4. email support-eadmissions@adm.monash.edu.au giving the Applicant ID, Application Number, and asking that the application be changed to PENDING status as the application fee has been paid.

5. Process the payment itself by whatever process is normally used for processing admission application fees.

7 Promo Code Request MRS Report

A report is available in the Monash Reporting System (MRS) to report on the Promo Codes that have been produced. The report is called the "Admission Fee Waive Codes" report, and is available under the Admissions menu in MRS.

The report can be run by various parameters. Of note are the Data Range parameters. You need to put a Start date range (ie two dates) in the range you want the Promo code production for; and two dates in the End date range. This is due to the fact that there may be Promo codes current for some of the same dates, but different date ranges. Leave blank to get all dates.

8 User support

Support for users of Selection Process Management will be provided by the eAdmissions Project Team until the end of 2008. After the project is complete, support will be handed over by the Project Team to the Callista Service Desk (for functionality) and the Admissions Unit (for advice on set-up and process).

For eAdmissions Project Team support email:

support_eadmissions@adm.monash.edu.au

9 Appendix

9.1   Appendix 1

Application Fee Payment Cover Sheet

Please ensure you attach this cover sheet to any application payment made by cheque or draft.

Applicant ID:	14323
Application number:	235940
Name:	MS AMANDA CUNNING
Previous Monash University ID Number: (if applicable)	_____
Contact Address:	21 JUMP STREET BENTLEIGH VIC 3204
Contact Email:	amanda.cunning@adm.monash.edu.au
Contact Phone Number:	_____

Please make all cheques payable to Monash University.

Please forward your payment, together with this cover sheet to:

International Recruitment Services
Monash University
871 Dandenong Road
Caulfield East
Vic 3145
Australia

Office Use Only: OneStop Trancode 902

Contact Information in regard to payments
International Recruitment Services
Telephone: (03) 9903 4788 - International: +61 3 9903 4788
Fax: (03) 9903 4778 - International: +61 3 9903 4778
Email: scenquiries@adm.monash.edu.au

9.2 Appendix 2

TranCode 902 OneStop payment screen

9.3   Appendix 3

TranCode 253 OneStop payment screen

Please note, 253 OneStop form may include an optional Applicant Id field for processing.

9.4   Appendix 4

This is the screen that the applicants see when they select the PAY option in the Applicant Portal. All information is pre-populated for the applicant.