CAMS THREE RIVERS SYSTEMS Enterprise

Student Housing

Three Rivers Systems, Inc

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Abstract

This document is designed to guide you through the steps necessary to setup the Housing module. Step-by-step Instructions are provided as well to assist you with the day to day operations. The contents of this document will take you through:

- Room Setup
- Fee Setup
- Housing Maintenance
- Room Assignment
- Fee Assignment
- Housing Refunds
- Copy Room Fees, Room Assignments and Student Fees

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Room Setup

Prior to assigning room and fees to students, there are some setup steps that need to be addressed. This section focuses on Room Setup and is followed with a section on Fee Setup, both necessary steps in preparing the Housing module.

In this section, you will learn how to…

- Populate the Rooms reference table with all rooms to be used in Housing.
- Create active list of rooms for set term.

Populating Rooms Reference Table

The Rooms reference table is a repository for all rooms used by your institution. Within the table you will be able to categorize these rooms to differentiate between room types (Academic, Administrative, Housing, etc.). This step is necessary in order to generate an Active Housing Rooms list.

Step-by-Step: Add to Rooms Reference Table

1. From the **CAMS Enterprise Home** page, click **Cams Manager > Lookup Table Options >Table Maintenance**. Then click the Reference Tables tab.
2. Scroll to the Rooms reference table. Click on this entry to view the records in the Rooms table.
3. Right-click to add a new record or double-click an existing value to make modifications.

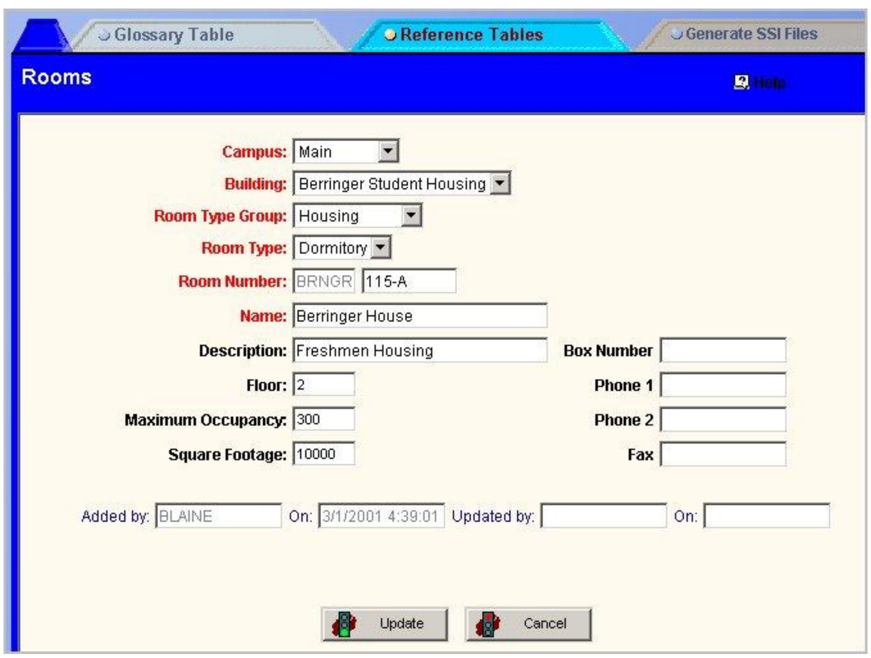

Figure : Rooms Reference Table Entry form

4. Select Campus, Building, Room Type Group and Room Type from the drop-down lists.

   Campus – *Campuses* reference table

   Buildings – *Building* reference table

   Room Type Group – *Room Type Groups* glossary table

   Room Type – *Room Type* reference table

5. Enter additional room information including name (required field), description, maximum occupancy, and square footage if desired.
6. Supply communications information (box number, phone, fax) if these items are constant with the housing room itself. If phone numbers and mail box numbers are assigned to the students rather than rooms, leave these fields blank in the reference table.
7. When satisfied with the entries, click **Add** or **Update** to save your record or **Cancel** to exit without saving.

Setting Up Housing Rooms

Once rooms you wish to use in housing have been added to the Rooms reference table, the next step is to create your room list within the Housing module. This list will contain all rooms to be used in housing assignments. These rooms have an active and inactive status which allows you to remove them from the assignment list (see Room Assignment section of this document) without removing them from your main housing room list

Step-by-Step: Setup Room in Housing

1. Access the Housing Setup Rooms window by clicking **Housing >Setup >Rooms**.

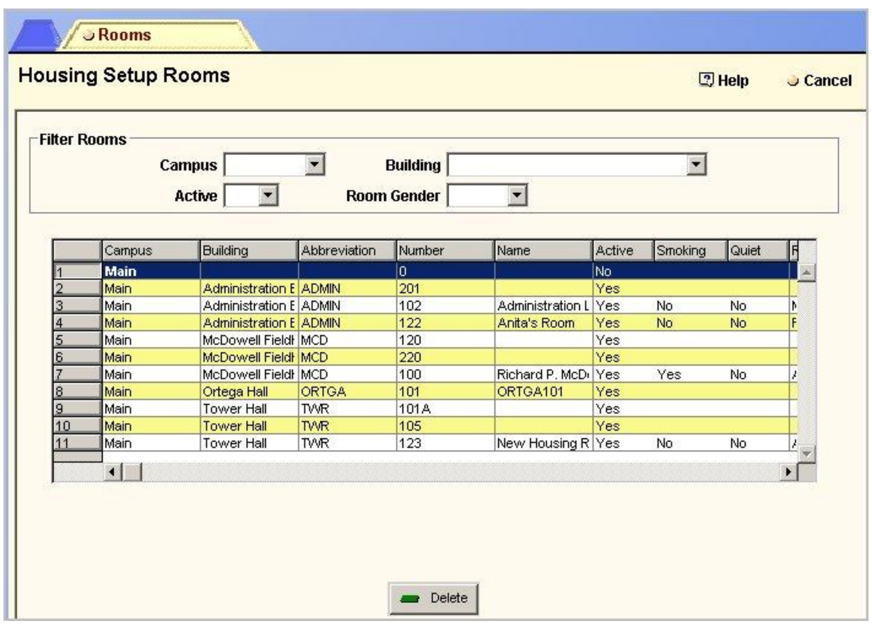

Figure : Room Setup window

The rooms shown in the data grid represent all available housing rooms. From this location, rooms are added to the list and various room information is maintained, including the designation of Active or Inactive.

2. Right-click in the data grid to add a new housing room listing.

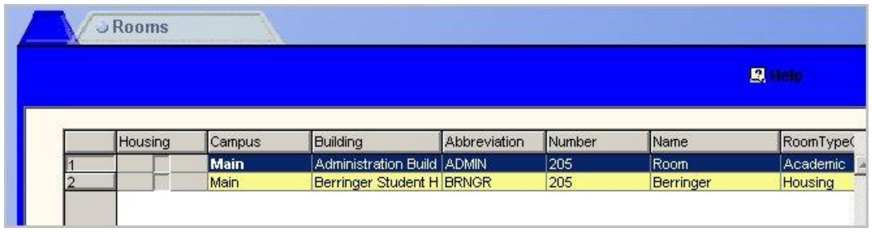

Figure : Room List

The values listed in this data grid consist of all rooms in the room list that have not yet been added to your housing availability list (as seen in previous window). Only those records that have previously been entered in the Room reference table will appear in this list.

3. To add a room from the Room reference table to your Housing room list, click the box next to each room you wish to add.
4. Click **Add** to save your selection or **Cancel** to exit without saving. You will be returned to the Housing Rooms Setup form. Your new listing should now appear in the data grid in the lower portion of the form.
5. To modify room attributes, double-click the desired room. The detail entry form will open.

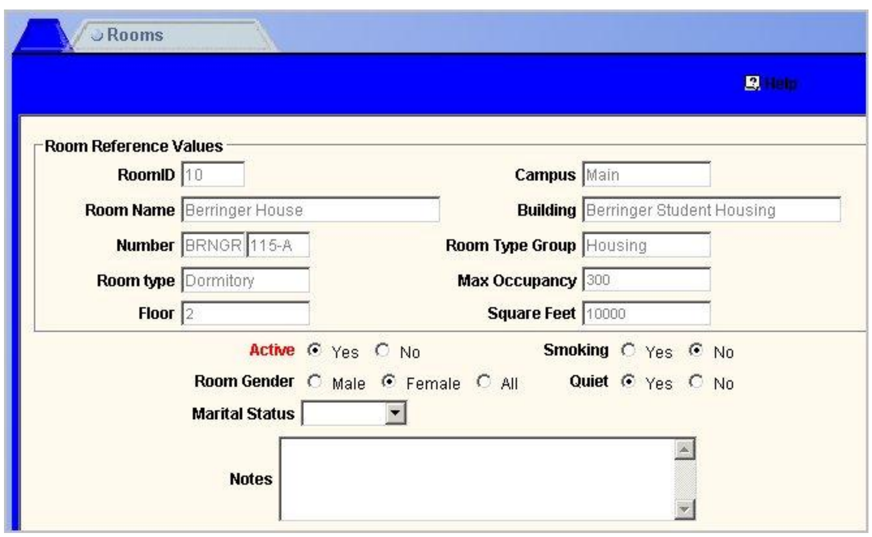

Figure : Room Attributes window

The Room Reference Values section at the top of the form is for viewing purposes only and cannot be changed. If you note a discrepancy in this data, it will have to be changed in the Rooms reference table in CAMS Manager module.

6. Designate whether the room is Active or Inactive. Only Active rooms will appear in the room list when setting up and assigning room fees in the Housing Fees Setup window.
7. Supply remaining room attributes. Is the room:
   a. gender specific
   b. reserved for particular marital status
   c. smoking/nonsmoking
   d. quiet/non-quiet
8. Use the notes section to record any specific information about the room, such as listing furniture that comes with the room, discrepancies with the room (i.e. preexisting damage), or any other type of information you wish to keep with the room record.
9. Click **Update** to save your changes.

Housing Fees Setup

The Housing Fees Setup window is used to define fees for rooms, meals, and any other miscellaneous student fees that are assigned though Housing. This location is also used to setup your institution's refund schedules as they apply to housing charges.

In this section, you will learn how to…

- Setup Housing Refund Schedules
- Define Room Fees
- Define Student Fees

Defining Housing Refund Schedules

The Refunds Setup window is used to set up your refund structure for housing charges, both room and student fees. Numerous schedules can be set based on your institution's practices and policies. Refund schedules are applied during fee setup and thus must be completed prior to defining fees

Step-by-Step: Create a Refund Schedule

1. From the **CAMS Enterprise Home** page, click **Housing >Setup >Fees/Refunds >Refunds** tab. The Housing Refunds form opens.

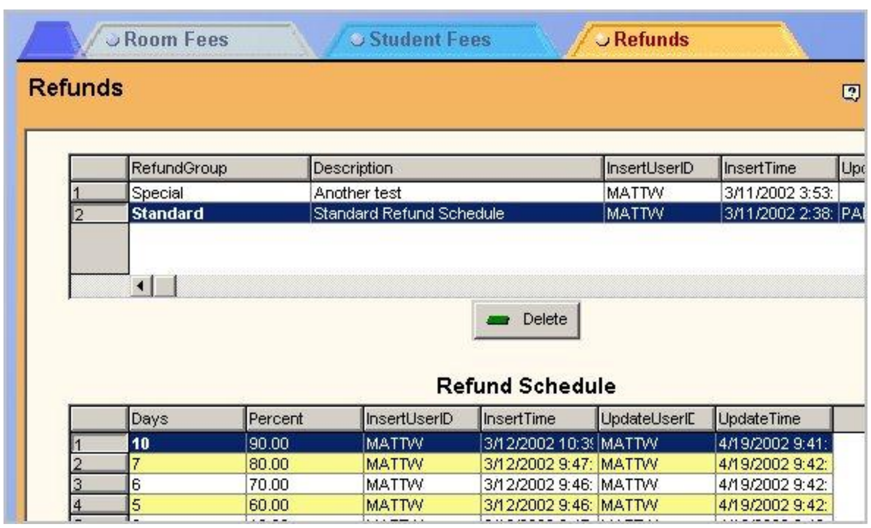

Figure : Refunds window

The top data grid displays a list of all refund groups that have been set up (or blank if this is the first time this form has been accessed). The bottom grid shows the refund schedule for each group. The refund schedule is set up so that you can enter a series of refund percentages for the number of days being refunded.

2. To add a new refund grouping, right-click in the refund groups data grid.

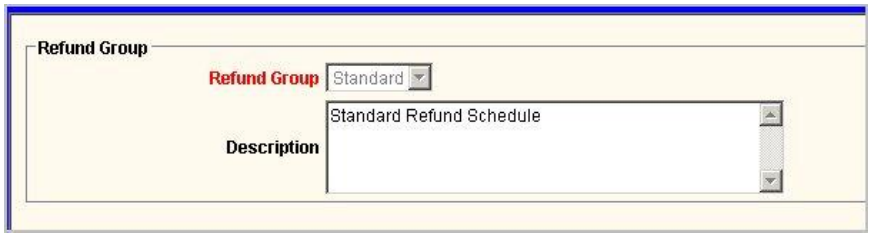

Figure : Refund Group window

3. Select the Refund Group from the drop down list (Housing Refund Groups glossary table). This glossary table must be populated prior to setting up refund schedules.
4. Click **OK** to return to the Refunds Setup form.
5. Highlight the Refund Group in the upper data grid. The bottom data grid, Refund Schedule, will display the refund schedule for the highlighted group.
6. With the proper Refund Group highlighted right-click in the Refund Schedule data grid to add a new record.

Figure : Refund Schedule window

7. In the detail entry form, enter the number of days to be refunded and the percentage of the original payment amount to be refunded.

These refund groups will be linked to the Room and Student fees when those fees are set up in Housing Setup. When a refund is generated for these fees, the user will enter the number of days to be refunded; this number will correlate with a designated percentage based on the Refund Schedule assigned to the fee being refunded.

Setting Room Fees

Now that rooms have been established and refund schedules are in place, you will create your fee structure for room charges. Upon assigning a room to a student, the associated fee will be applied to the student’s housing record (visible in Housing Maintenance for that student). Because fee structures can change from term to term, all room fees are term specific.

The process CAMS uses is to create all possible room fees and then apply them to all appropriate rooms. For each fee listed, you will easily be able to see which rooms have been linked to that fee. Multiple fees can be applied to a single room.

Step-by-Step: Setup a Room Fee

1. From the **CAMS Enterprise Home** page, click **Housing >Setup >Fees/Refunds**. The Housing Fees Setup window opens.
2. Enter a **Term** in order to display data grid values.

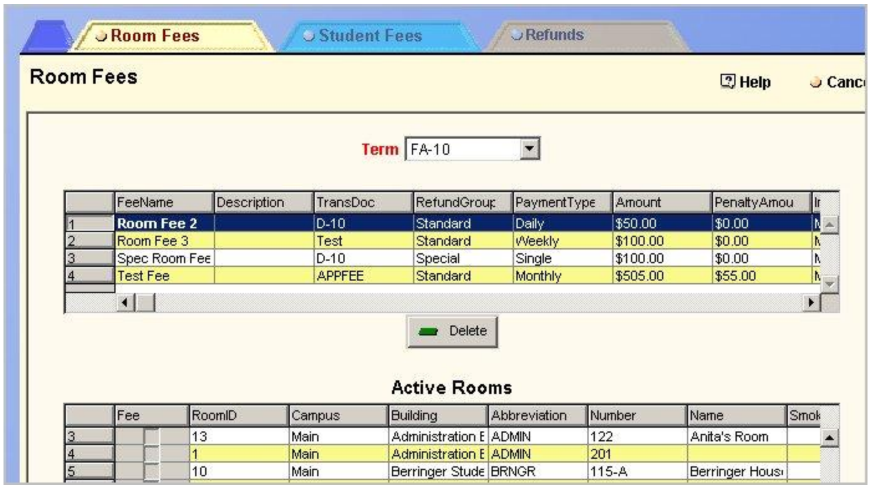

Figure : Housing Fees Setup window

The top data grid, **Room Fees**, displays all room fees, while the bottom grid, **Active Rooms**, displays all rooms that have been added to the Housing Rooms list and have been designated as active. *If you feel a room has been inaccurately left off the list, check the detail in Room Setup to confirm that it has been marked as active.*

3. To add a new fee, right-click in the fees data grid.

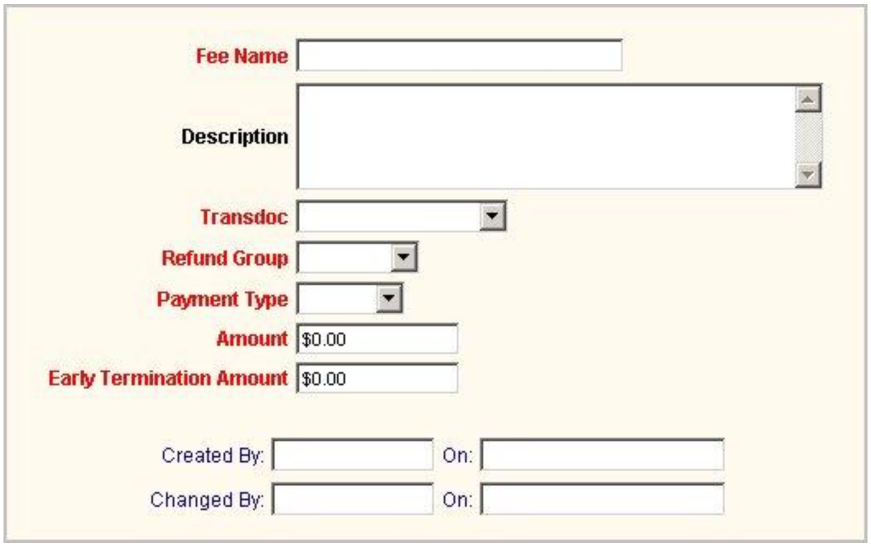

Figure : Add New Fee window

4. Supply field value:

   Fee Name

   Description of Fee

   TransDoc – Select appropriate TransDoc for this Housing fee. TransDocs are defined in the CAMS Manager module. They direct the fees charged to the appropriate accounts in General Ledger, and they also provide some default and grouping attributes. See TransDocs for more detail.

   Refund Group – Refund Groups, previously defined, determine how a housing room fee will be refunded, if at all.

   Payment Type – Designate whether this fee will be payable Single, Daily, Weekly, or Monthly.

   Amount – Enter the payment amount based on payment type (i.e. daily, monthly, etc.).

   Early Termination Amount –Should the housing contract be terminated early, will there be an early termination fee. If so, enter that amount here.

5. Click **Add** to save new record.
6. Repeat this process for each fee type needed.

Applying Room Fees to Selected Rooms

Rooms have been set up and room fees created. The next step now is to apply or link these fees to the appropriate rooms.

Step-by-Step: Apply Room Fees.

1. From the **CAMS Enterprise Home** page, click **Housing >Setup >Fees/Refunds.** The Housing Room Fees form opens. Then click the **Room Fees** tab, highlight the fee you wish to assign.
2. In the **Active Rooms** data grid, click the box next to each room to which you wish this fee to apply.

To easily view all rooms that have been selected for the highlighted fee, click the Fee header in the Fee column. You will then be able to view the list in ascending or descending order.

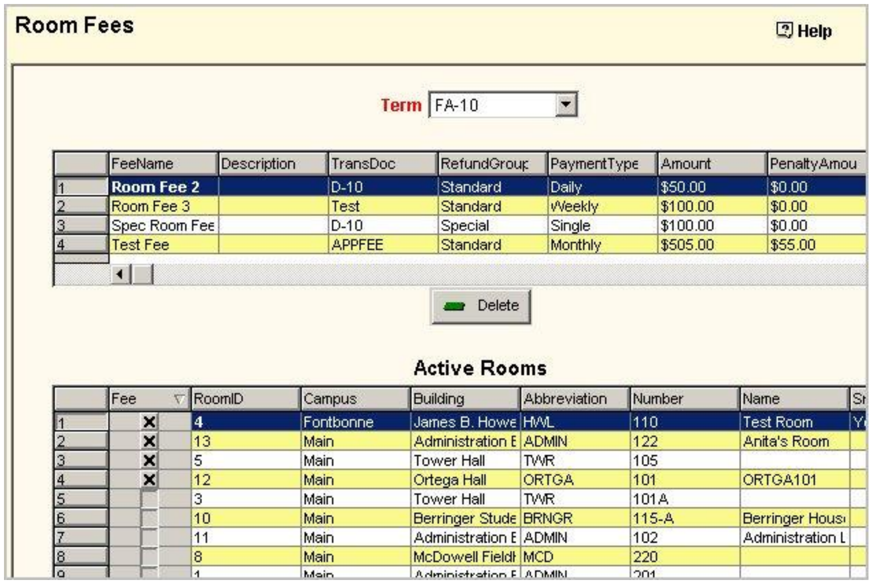

Figure : Room Fees window

3. After selecting all desired rooms, simply close the window to save your changes.

Creating Student Fees

The Student Fees form is used to create various fees that you wish to keep separate from room fees, such as fees for meal plans. You will create as many fees as needed and apply these fees to students in the Student Fee Setup form as appropriate. Students can be assigned multiple fees as necessary.

It is required that students have an active housing record in order to apply Student Fees. Individual active records are set through Housing >Maintenance, or you can assign active housing records to a group of students in Housing >Setup >Mass Set Maintenance.

Step-by-Step: Create Student Fee

1. From the **CAMS Enterprise Home** page, click **Housing >Setup >Fees/Refunds**. The Student Fees Setup form opens. Click **Student Fees**.

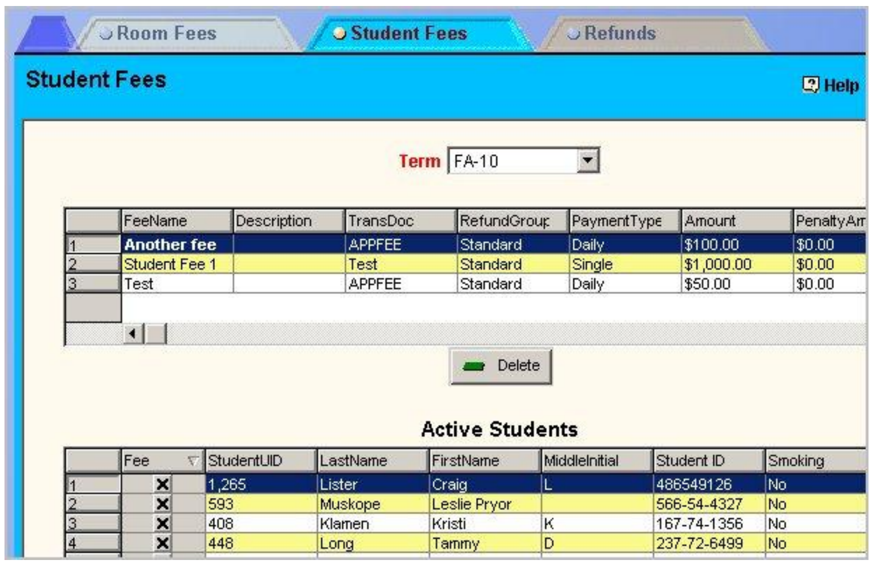

Figure : Student Fees window

The top data grid is a listing of all Student Fees that have been created. The bottom data grid, **Active Students**, is a list of all students with an Active housing record (designated in the Housing Maintenance window).

2. To add a new Student Fee, right-click in the fee data grid.

Figure : Add Student Fee window

3. Supply field values…
    - **Fee Name**
    - **Description of Fee**
    - **TransDoc –** Select appropriate TransDoc for this Housing fee. TransDocs are defined in the CAMS Manager module. They direct the fees charged to the appropriate accounts in General Ledger, and they also provide some default and grouping attributes. See TransDocs for more detail.
    - **Refund Group –** Refund Groups, previously defined, determine how a housing room fee will be refunded, if at all.
    - **Payment Type –** Designate whether this fee will be payable Single, Daily, Weekly, or Monthly.
    - **Amount –** Enter the payment amount based on payment type (i.e. daily, monthly, etc.).
    - **Early Termination Amount –** Should the housing contract be terminated early, will there be an early termination fee. If so, enter that amount here.
4. Click **Add** to save new record.
5. Repeat this process for each fee type needed.

Linking Student Fees to Selected Students

Student fees are linked to students in Housing Fees Setup; however they are actually generated in the Generate Student Fees form (more discussion on this in the Housing Assignments section). Here, we simply link the appropriate fee(s) to the appropriate students.

Step-by-Step: Link Student Fee to Students

1. In the Student Fees setup form, highlight the fee you wish to assign.
2. Click the box next to all appropriate students in the **Active Students** data grid.
3. Repeat these steps for all fees you wish to apply to students. Students can

have multiple fees assigned.

4. After assigning all desired fees, simply close the window to save your changes.

Now that student fees have been set up and fees have been linked to students, the next step to complete the process of actually applying these fees to a student's record takes place in **Housing >Assignments >Fees**. This process is discussed in detail in the section titled Student Fee Assignments.

Housing Maintenance

Housing records are created and maintained in this location. It is in Housing Maintenance that you store housing preferences and view current and historical room assignments and student fees.

The **Room Assign** and **Student Fees** tabs in this window can be used to edit existing assignments, however new assignments are made through Housing >Assignments >Rooms and Housing >Assignments >Student Fees.

In addition to the data fields, CAMS provides a User Defined button that includes several fields which can capture other data about students. Labels to these fields are configured according to your institution within the CAMS Manager module.

Creating Student Housing Maintenance Record

All students who are to participate in the housing program must have a housing record. Note that anyone entered as faculty or contact in your database can also be assigned rooms through Room Assignment, however they do not require a housing maintenance record.

Step-by-Step: Create a Housing Maintenance Record

1. From the **CAMS Enterprise Home** page, click **Housing >Maintenance**. The Maintenance window opens.
2. Select the student with whom you will be working.

When a Housing Assignment is deleted from within the Room Assign tab, the Student Status for that term will automatically be

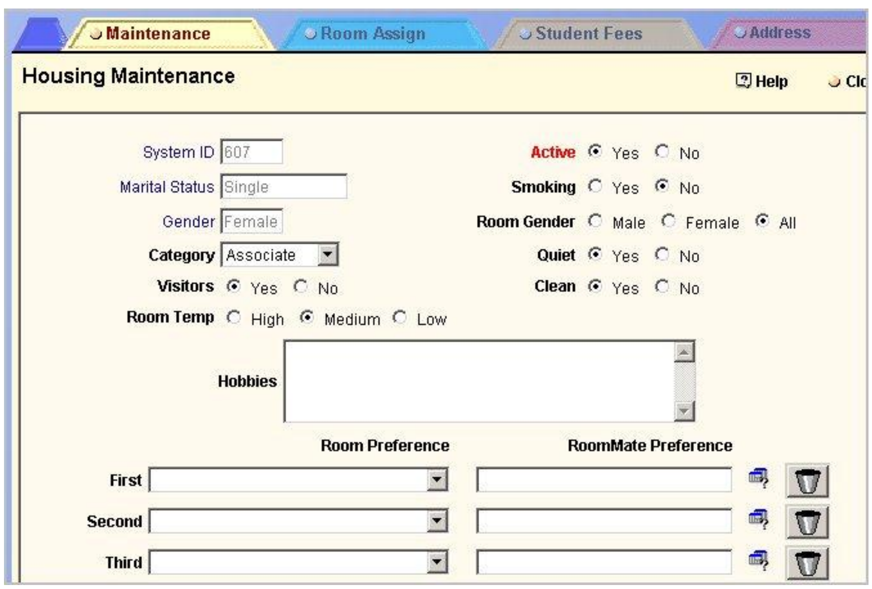

Figure : Housing Maintenance window

3. Indicate whether this individual is Active in the housing program. This field is used to determine whether the student appears in the Active Student list when assigning fees and rooms.
4. Indicate the student's housing preferences, including room and roommate preferences. Use the search icons next to the Roommate Preference fields to locate an existing student. If "Read SSI Failed" displays in the Room Preference fields, then Rooms have not yet been created in **Housing >Setup**

>Rooms.

Mass Set Maintenance Records

Housing records can be individually marked active or inactive or multiple records can be marked simultaneously. This process will also mass create housing records for those students that do not currently have one

Step-By-Step: Mass Set Maintenance Records

1. .From the **CAMS Enterprise Home** page, click **Housing >Setup >Mass Set Maintenance.** The Mass Set Housing Maintenance screen displays.

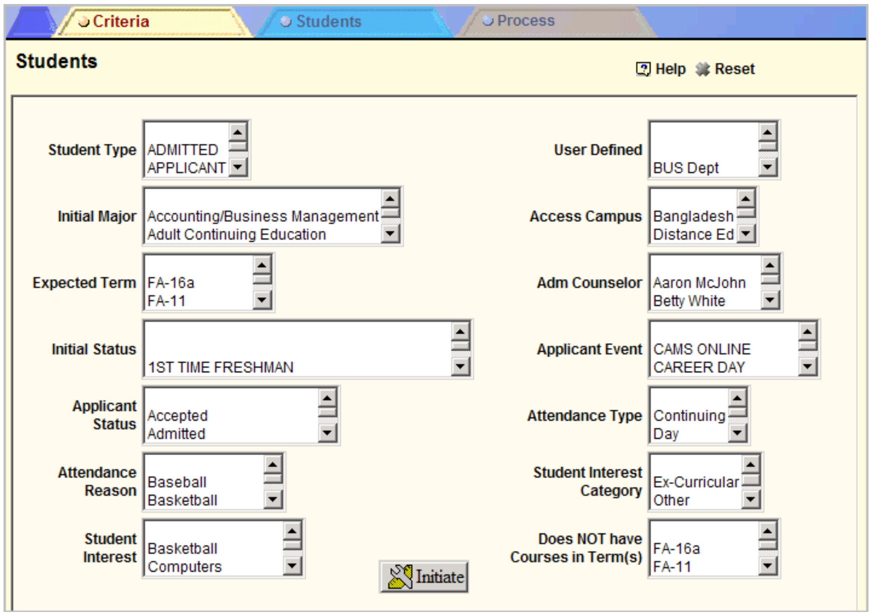

Figure : Mass Set Maintenance screen

2. Select the criteria to identify specific groups of students. Click **Initiate**.

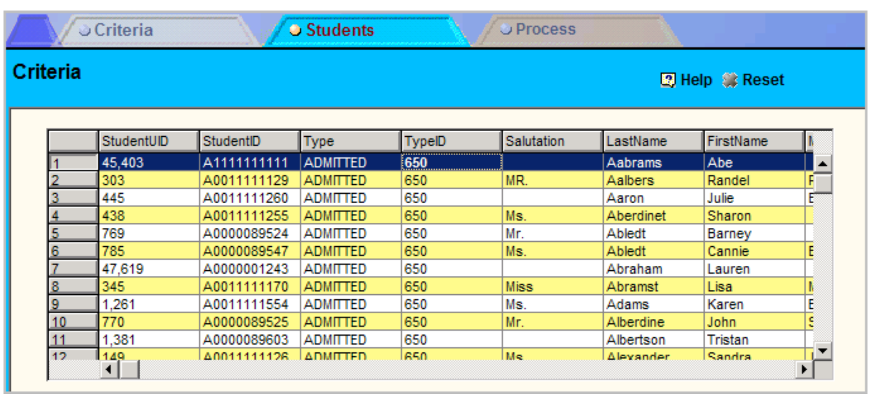

Figure : Student List

3. Review the list of students. Delete individual students from the list as needed. Click the **Process** tab.

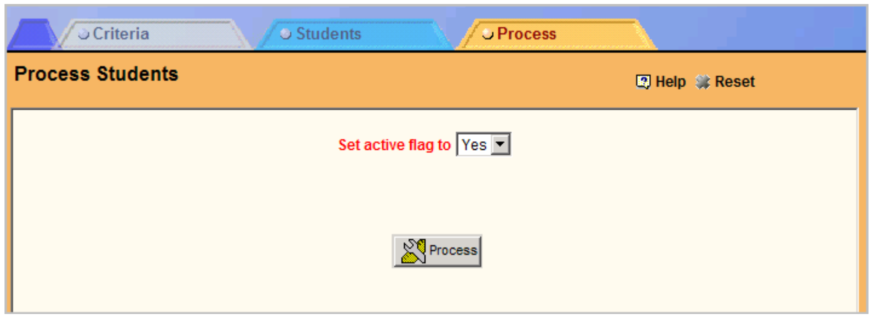

Figure : Set Active Flag

4. Set the Active flag to Yes or No and click **Process**. All maintenance records in the list will be marked with the designated Active Flag value and a housing maintenance record will be created for students on the list that do not have one.

Once the maintenance record is complete, the student is ready to receive room and fee assignments. The Room Assign and Student Fees tabs in this window are for viewing purposes only. These assignments are made through Housing Room Assignment window and the Housing Student Fees [Assignment] window.

Rooms can be assigned to Students, Faculty, or others as necessary. In order to assign a room to someone other than Students or Faculty, they must have a record under Contacts.

The Room Assignment window has three tabs--Fee Generation, Assignment, and Process, each of which are described below:

Fee Generation – This form is used to generate a list of fee transactions that will be applied as rooms are assigned.

Assignment – The Room Assignment form is where students will be assigned to each room as applicable.

Process – The steps performed in this location actually generate the fee transactions for each person assigned to a room.

Room Fee Generation

In Room Fees Setup, we established all room fees and identified the rooms to which each of these fees will apply. (See Housing Fees Setup section of this document for more detail.) A fee, or payment amount, was established and a payment method selected (i.e. daily, weekly, etc.)

In the Fee Generation form, criteria are entered to select the appropriate fees. CAMS will produce a schedule of payment due dates and amounts based on the fee setup.

Step-by-Step: Generate Fee List

1. From the **CAMS Enterprise Home** page, click **Housing >Assignments >Rooms.** The Housing Fees Generation form opens. Click the **Fee Generation** tab.

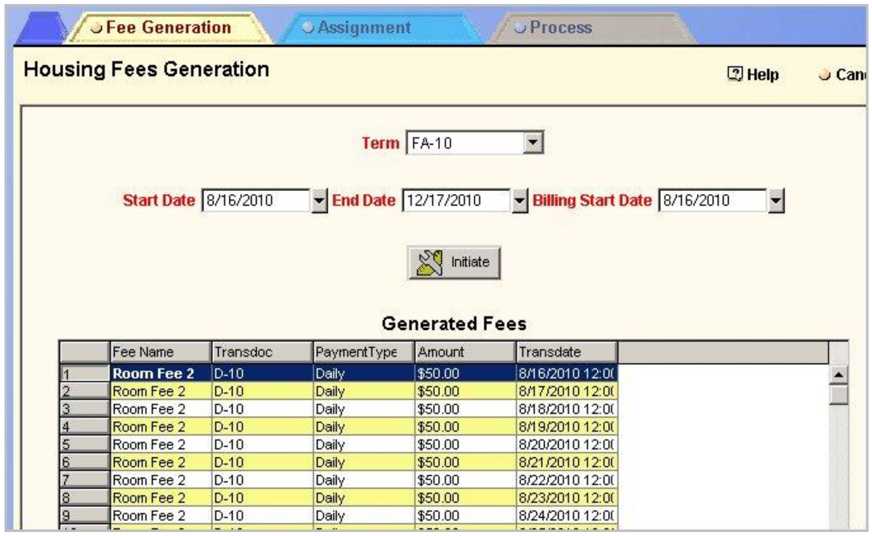

Figure : Fee Generation tab

2. Select appropriate term. The start and end dates for that term will be automatically populated, along with the Billing Start Date (which will default to the same as the start date). These dates can be changed if necessary.
3. Click **Initiate**. The Generated Fees data grid will be populate with the fee schedule based upon the fee setup.
4. Use the **Delete** button to remove any fees you do not wish to be applied.
5. Double-click any fee in the data grid to view the detail.

Figure : Rooms with Fee window

6. If desired, changes can be made to the fee amount as well as the billing date.
7. The **Rooms with this Fee** data grid will display all rooms that have this fee link set up in the Room Fees setup. Click the “+” next to the room to view a

list of those who have been assigned to that room.

8. Click **Update** to save your changes.

The fee amounts and schedules have been established. You are now ready to assign rooms to students.

Assigning Rooms

Step-by-Step: Assign Students to Rooms

1. After following the steps outlined in the previous section, Fee Generation, click the **Assignment** tab to access the Room Assignment form.

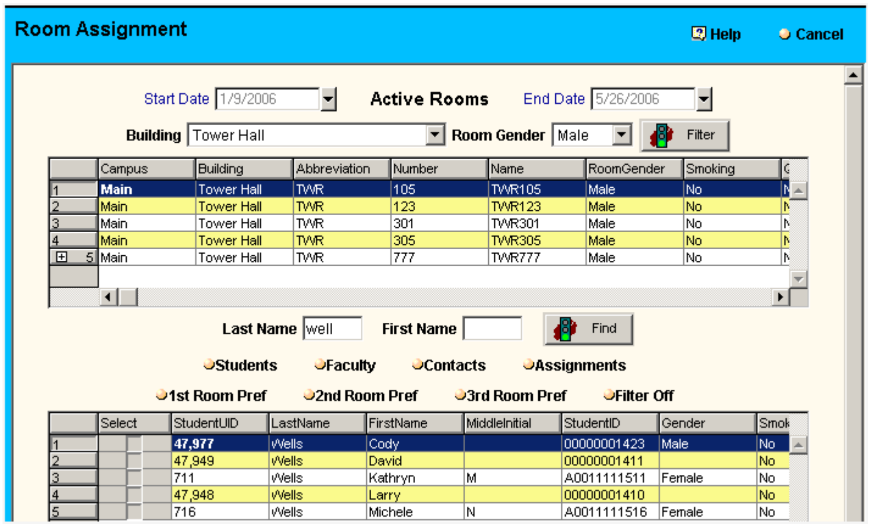

Figure : Room Assignment window

2. The data grid at the top of the form displays all Active Rooms that have been designated in Room Setup. (Optional) Select **Building** and/or **Gender** and click **Filter**. All rooms meeting your criteria will be displayed in the upper data grid.

3. Enter criteria for **Last Name** and **First Name** as desired and click the **Find** button to bring up a list of students with Active Housing Maintenance records.

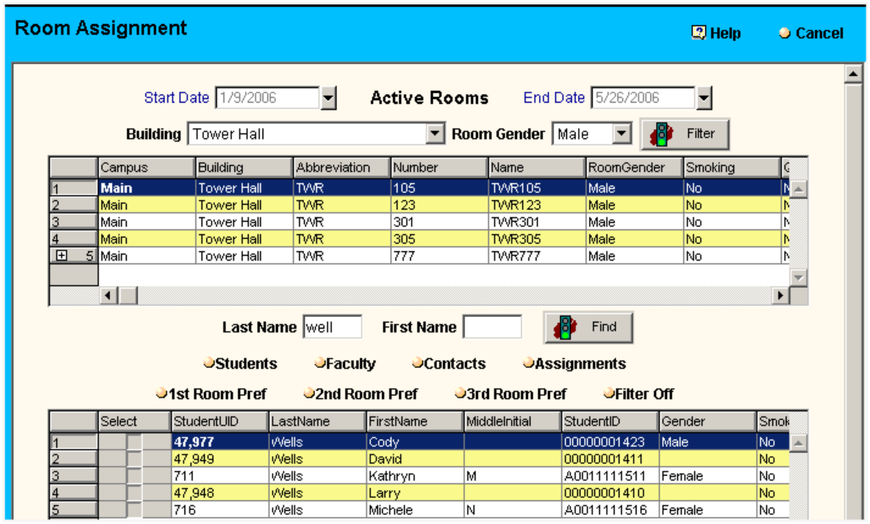

Figure : Room Assignment window

There are four buttons you can select:

- **Students –** To view only active students in the lower data grid. If Students is selected, you then have the option to view room preferences for the highlighted room. For instance, if 1st Room Preference is selected, a list of all students who have requested the highlighted room as their first choice will be listed in the grid.
- **Faculty –** Click Faculty to produce a list of your faculty for room assignment.
- **Contacts –** If you wish to assign a room to one other than student or faculty, they must exist in the contact list. Click Contacts to view that list for selection.
- **Assignments –** Clicking Assignments will result in displaying a list of assignments to be processed for the current session.

4. Click the "**+**" next to the room to view a list of those who have been assigned to that room.

5. To assign individuals to a room, Highlight the room with which you are working (upper data grid) and click the box next to the student id (or Faculty/Contact name) in the lower data grid. In this step, you are selecting those you wish to add to the room.

6. Repeat this process for each room you wish to assign. Your next step will be to "Process" the Room Assignments and Fees.

Processing Room Assignments

Step-by-Step: Processing Room Assignments

1. After completing the assigning of rooms, click the **Process** tab.

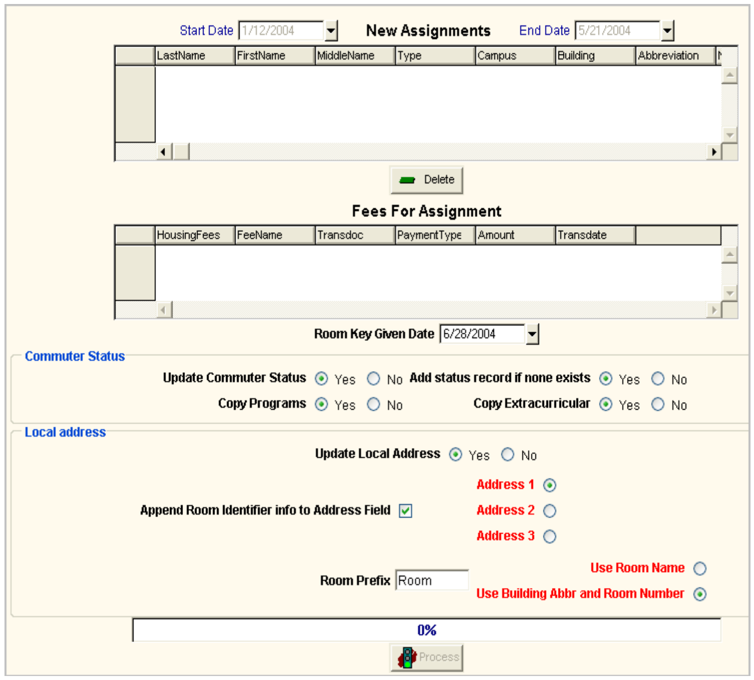

Figure : Process Room Assignments window

All assignments just created will appear in the **New Assignments** data grid. The lower data grid, **Fees for Assignment**, will display the fees associated with the individual's assignment (the highlighted record in the **New Assignments** data grid).

2. Use the **Delete** button to remove any assignments that you do not want to process.
3. Enter the **Room Key Given Date**.
4. Set the **Commuter Status** fields:
    a. **Update Commuter Status** – Will change the status from Commuter to Resident. Student must have a status record for the term that a room assignment is processed.
    b. **Add Status Record If None Exists** – Will add a student status record for anyone who does not have one. The default choice can be set in **CAMS Manager >Configuration >General 2** tab.
    c. **Copy Programs** – Will copy previous programs to this term.
    d. **Copy Extracurricular** (Activities) – Will copy previous extracurricular activities to this term.

Note: *Copy Programs and Copy Extracurricular will only copy if Add Status Record If None Exists is set to Yes.*

5. Determine whether or not to update the local address in accordance with the

new assignments.

6. Decide whether to Append Room Identifier info to Address Field. When this option is selected new options appear. The two options for Room Identifier are **Use Room Name** and **Use Building Abbreviations and Room Number**.
7. You then need to choose whether to append this information to the **Address 1, 2 or 3** line.
8. Fill in the **Room Prefix** if you want text (Room, Apt, etc.) before the identifier.

For example, if the building address was 233 Morton Rd and the Room Name was "Blue" and you selected to append the Room Name identifier to Address 1, then the address would print out as 233 Morton Rd Room Blue.

9. Click **Process**. Room assignments and room fee transactions will be sent to the Student Housing Maintenance records, and all room fee transactions are ready to be transferred to billing.

Assignments are not saved until the Process function is executed. Thus all selections made in the Room Assignment form will be lost if the window is closed or the term is changed prior to Processing.

Terminate Room Assignment

If a student is leaving housing before the end of the term you will need to take that student out of the room assignment and also make the room available for someone else to move in. Or a student might only be moving to a different room, the fees are the same, and you don't want to charge the fees again.

Student is Leaving Housing Altogether

Step-By-Step: Un-assign a Student from Housing

1. From the **CAMS Enterprise Home** page, click **Housing >Refunds/Charges >Rooms.** The Housing Room Refunds window opens.
2. Select the Term and enter the Last Name of the student, then click **Find**.
3. Double click the student in the data grid.
4. Change the End Date to reflect the last day the student will occupy the room.

The room will be shown as available the next day.

When a room assignment is terminated early, the Student Status for that term will automatically be updated to

Note: *If you run a report, for example a list of students in housing, and use a date range that includes a time when the student was actually in housing it will show the student as still being in the room. To get a current list ensure that you use a date range starting after the student's last day in the room.*

If you want to also give the student a refund then see the refund sections below.

Student is Moving to Another Room

Step-By-Step: Quick Move a Student to Another Room

Using the Quick Move option will immediately change the room the student is in but will not create any charges nor will it keep a history of the room the student occupied previously.

1. From the **CAMS Enterprise Home** page, click **Housing >Maintenance >Assign Room** tab**.**
2. Open the current room screen.
3. Click the search icon next to the **Room** field to open the **Active Housing Room Lookup** window.
4. Use the Find criteria to locate the room to which the student is moving.
5. Double-click the room in the data grid.
6. Click **Update** to save the changes or **Cancel** to exit without saving.

Note: *If you change a room assignment, you may opt to have the local address automatically updated (this inactivates the current local address creates a new active local address record). Choose Address Line 1, 2, or 3 to indicate which line should hold the updated room information.*

Step-By-Step: Move a Student to Another Room and Preserve History

When a room assignment is terminated early, the Student Status for that term will automatically be updated to

1. From the **CAMS Enterprise Home** page, click **Housing >Refunds/Charges >Rooms.** The Housing Room Refunds window opens.
2. Select the Term and enter the Last Name of the student, then click **Find**.
3. Double click the student in the data grid.
4. Change the End Date to reflect the last day the student will occupy the room. Click **Update**.

This will show that the student moved out of the room on this date and you preserve the history of the rooms the student occupied.

5. Now assign the student to the new room using the Assigning Rooms option above and ensure that you set the start date to the day after the student moved out of the original room.

Using the Assigning Rooms option will create additional room charges for the student that will need to be modified or deleted before they are sent to billing.

6. To modify those fees open the student's maintenance record and click the **Room Assign** tab.
7. Open up the new room to view the new room fee that was charged.
8. There are several options that will determine what you do with the new charge:
    a. **Student is moving from a double room to a single room.** If the charge for the single room is more than what they have paid already open the existing charge and change the amount to be only the difference that they now owe. For example, if a student paid $1000 for the double room but to move to the single room the charge is $1500 so they now owe $500, change the new existing charge of $1500 to $500. The next time you transfer monies to billing only $500 will be charged to the student.
    b. **Student is moving from single room to a double room.** You would do the same steps as in option a above but make the charge a minus $500. To do that you type in the new amount and press the minus key on your keyboard.
    c. **Student is moving to the same type of room and no change in charges is expected.** Just delete the new charge.
9. Once you have modified or deleted the fee click **Update** to exit the fee screen.
10. Click **Update** again to exit the room screen.

The student has now been moved from one room to another.

Student Fee Assignments

The steps taken prior to reaching this point include the setup of student fees and linking fees to selected students (see Housing Fees Setup). The next step in the process of creating transactions for these fees in performed in Fee Assignments. It is here where fee transactions are processed and made ready for transfer to the billing office.

In this section, three primary tasks for assigning student fees take place:

Fee Generation – Fees have previously been setup and linked to students. Here, the actual schedule is generated based on the setup.

Fee Selection – Select fees to be processed.

Fee Processing – This is the actual act of processing the fees, generating transactions for student records.

Assigning Student Fees

This process will generate the fee schedule based on the setup values previously established in Student Fee Setup (Creating Student Fees in the Housing Fees Setup section of this document).

Step-by-Step: Assign Student Fees

1. From the **CAMS Enterprise Home** page, click **Housing >Assignments >Student Fees**. The Housing Student Fees window opens.

Figure : Generate Student Fees window

2. Select the desired term. The remaining date fields will auto populate based on the term selected. These dates can be changed if necessary.
3. Once you have the desired dates supplied, click **Initiate** to generate the fee schedule. This step will take you directly to the Student Fee Selection form.

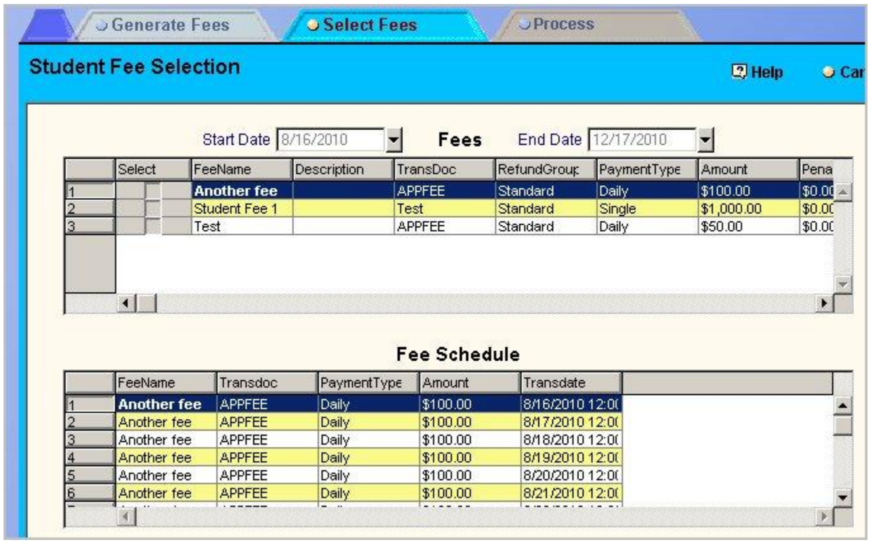

Figure : Student Fee Selection window

The top portion of the form shows the Fees data grid. These fees are derived from Student Fees Setup (Housing Fees Setup). The bottom grid, Fee Schedule depicts the payment schedule for each highlighted fee in the Fee data grid.

4. Review the Fee Schedule and use the **Delete** button to remove records in the Fee Schedule as necessary. (Highlight the Fee Name in the Fees data grid to view the detail schedule in the Fee Schedule data grid.)
5. To select fee(s) for processing, place an “x” in the box (by clicking in the box) next to the fee name in the Fees data grid.
6. Click the **Process** tab.
7. Click the **Print** button to produce an edit list of fees that will be applied to students.
8. Click the **Process** button. Fees will be applied to Active Students marked for fees in the Fee Setup. Transactions will be generated only for those not already charged for the selected fees. These fees can now be viewed in the Student Housing Maintenance records.

Transfer Housing Fees to Billing

Room fees and student fees have been setup, applied and processed. Until these fees are transferred however, they will not appear on the student's billing ledger. This section will cover the transfer process in detail. Both student and non-student housing fees (faculty, contacts) are transferred from this location.

Transferring Housing Fees

Prior to transferring to Billing, housing fees are considered **Pending**, and can be viewed on a billing statement as such if selected as part of the statement criteria. Once transferred to the Billing module, fees are no longer considered Pending, and are shown as debits to the owner's (Student, Faculty, or Contact) account. These fees can be modified or changed in the Billing Batch until the batch is distributed to the student's billing ledger. The same is true for faculty and contacts that have housing fees.

The transfer process allows you to send all housing fees or to use the transfer criteria fields to determine which fees to transfer. If desired, a single owner's fees can be transferred can be transferred as a billing batch.

Step-by-Step: Transfer Housing Fees

1. From the **CAMS Enterprise Home** page, click **Housing >Transfer**. The Housing Transfer window opens.

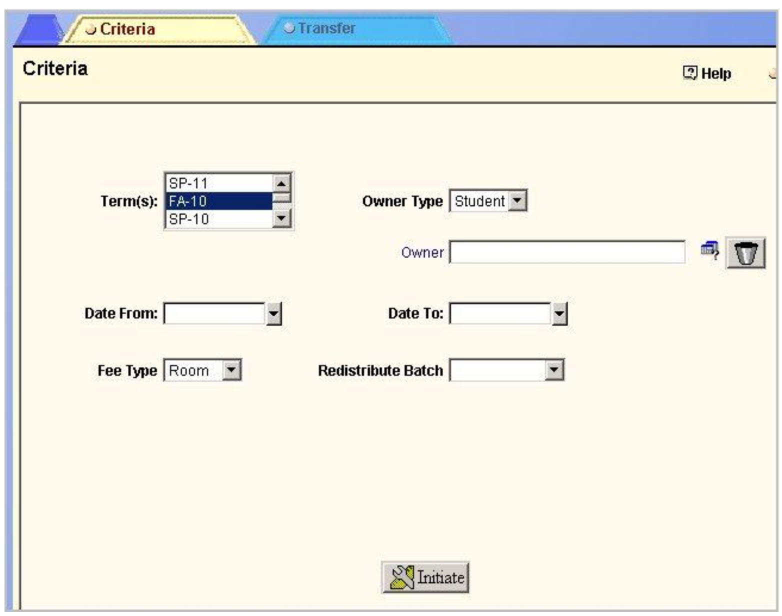

Figure : Housing Transfer window

2. Enter appropriate criteria to select the records you wish to transfer.
3. Click the **Initiate** button at the bottom of the form. The Transfer form will open and the data grid will display all transactions that are to be transferred.
4. If satisfied with the record set, enter a Batch Comment (a description to identify the batch.
5. If you wish to change the Effective Transaction Date so that all transactions have the same date, enter a value in that field. Note that this will overwrite the

original date of the transaction. If you wish to retain the original date to be used in the student ledger, then leave this field blank.

6. Click **Transfer**. The transactions now appear in the Billing Batch.
7. Use the Export feature if you wish to export these records to a tab delimited file.

Housing Refunds

The Room Assignment Refunds window displays all room assignments--Students, Faculty and Contacts (note Faculty is actually listed as Contacts). In addition to applying refunds, this form can be used to maintain housing assignments (fee adjustments, deletions, etc.)

Student assignments can be accessed through both the Housing Refunds and Housing Maintenance areas. The detail assignment/fee form seen in this location is identical to that seen in Student Housing Maintenance. The difference is that Housing Maintenance allows you to see the student's assignment history, while Housing Refunds are term dependent. The Housing Refunds form is the only location where you will find Contact (and Faculty) assignment records.

Refunding Room Fees

In addition to applying refunds, penalty fees for early termination can be charged to individuals. When applying a refund, you will have the option of skipping the refund portion and only applying a penalty fee, or you can process both.

Step-by-Step: Refund Room Fees

1. From the **CAMS Enterprise Home** page, click **Housing >Refunds >Rooms**. The Housing Room Refunds window opens.
2. Use the selection criteria to locate the individual to whom you wish to apply the refund. Upon clicking **Find**, a list of individuals matching your criteria will be displayed in the lower data list.
3. Double click the student you wish to give a refund.
4. Select the fees that you wish to refund.
5. Use the **Delete** button to remove records as necessary.

Note: Only those records that have not yet been transferred to billing can be deleted. If the Mark local address inactive check box is checked, CAMS marks the current local address to inactive. This is true even if the local address was not updated during the room assignment. If the student has no active local address, the student will not be included on reports which require an active local address.

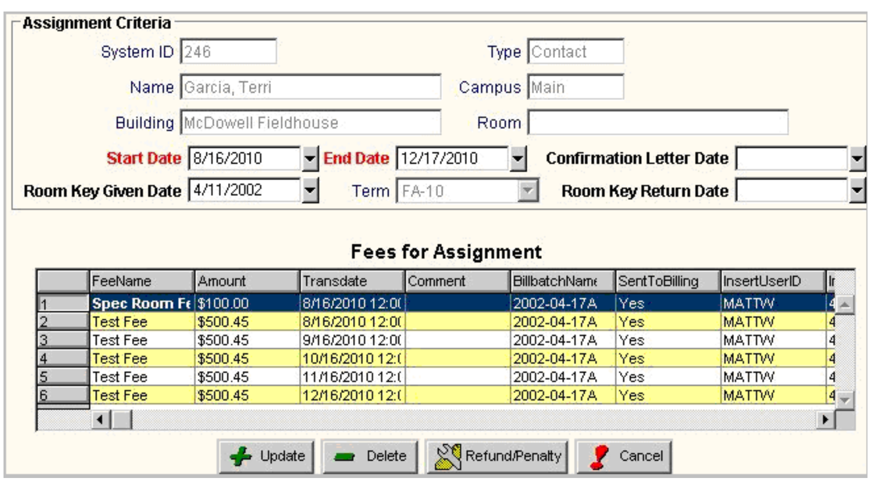

Figure : Room Refund window

To adjust fee transaction:

6. Select the appropriate individual and double-click the record to view the detail of the individual's assignment.
7. Double click the transaction you wish to adjust. The Fee Detail window opens.

Figure : Fee Detail window

8. Provided that the transaction has not yet been transferred to Billing, the amount and date can be adjusted here.
9. Click **Update** to save changes.

To apply a refund:

10. Enter the new end date for the room assignment. By entering a room date, CAMS will automatically offer a default number of days to refund.

Click **Refund/Penalty**.

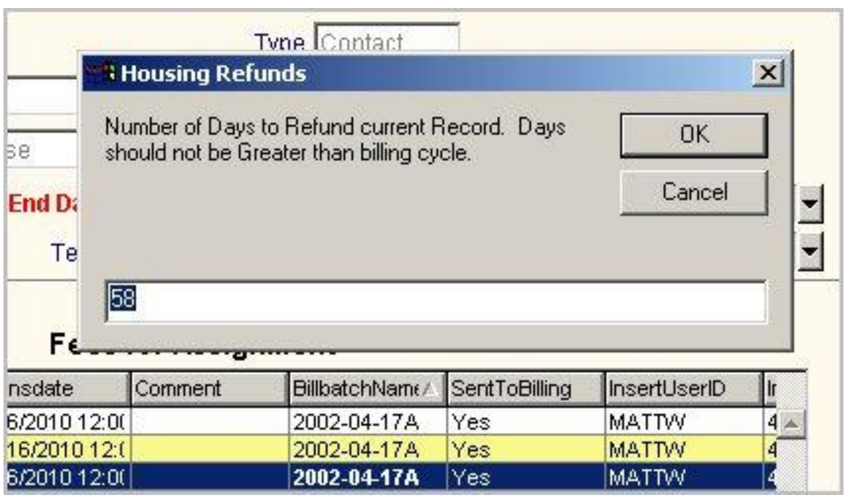

Figure : Refund Days window

11. Confirm, or change, the number of days to be refunded and click **OK**.
12. You will be prompted to "Charge Early Termination Fee". Click **Yes** or **No** as appropriate.
13. Click **Update** to save changes.

Note: *The changes made to fee transactions will be sent to Billing the next time the transfer process is run (using appropriate criteria to include the changes).*

Refunding Student Fees

The refund of student fees is similar to that of room fees, with the exception that you are working strictly with student records as opposed to faculty and contacts. Student fees can be viewed and maintained in Housing Maintenance, where historical information can be accessed whereas Housing Refunds is term specific in its record display.

Step-by-Step: Refund Student Fees

1. From the **CAMS Enterprise Home** page, click **Housing >Refunds >Students**. The Housing Student Refunds window opens.
2. Enter appropriate criteria to pull up the desired record set.

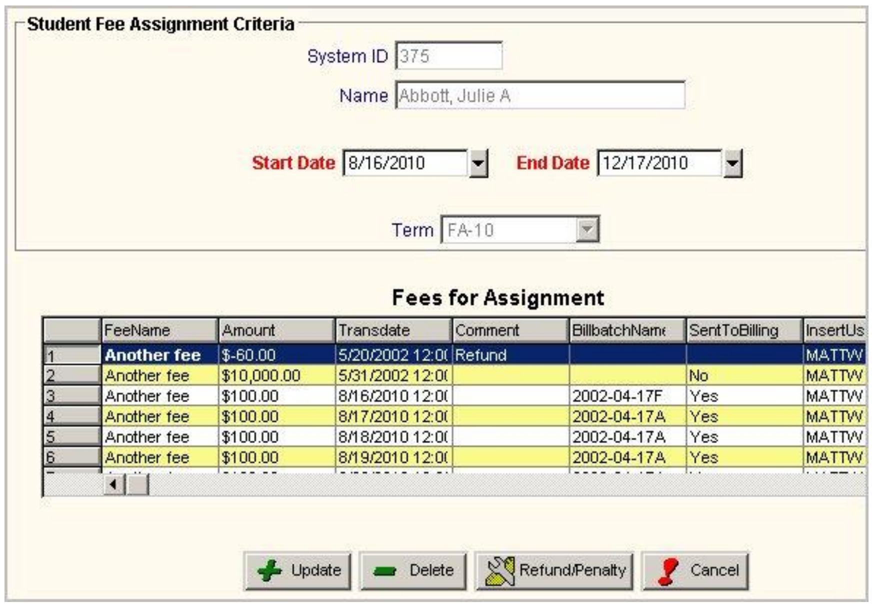

Figure : Refund Student Fees window

3. Use the **Delete** button to remove records as necessary.

Note: *Only those records that have not yet been transferred to billing can be deleted.*

To adjust fee transaction:

4. Select the appropriate individual and double-click the record to view the detail of the individual's fee assignment.
5. Double click the transaction you wish to adjust. The Fee Detail window opens.

Figure : Student Fee Detail window

6. Provided that the transaction has not yet been transferred to Billing, the amount and date can be adjusted here.
7. Click **Update** to save changes.

To apply a refund:

8. Enter the new end date for the room assignment. By entering a room date, CAMS will automatically offer a default number of days to refund.
9. Click **Refund/Penalty**.

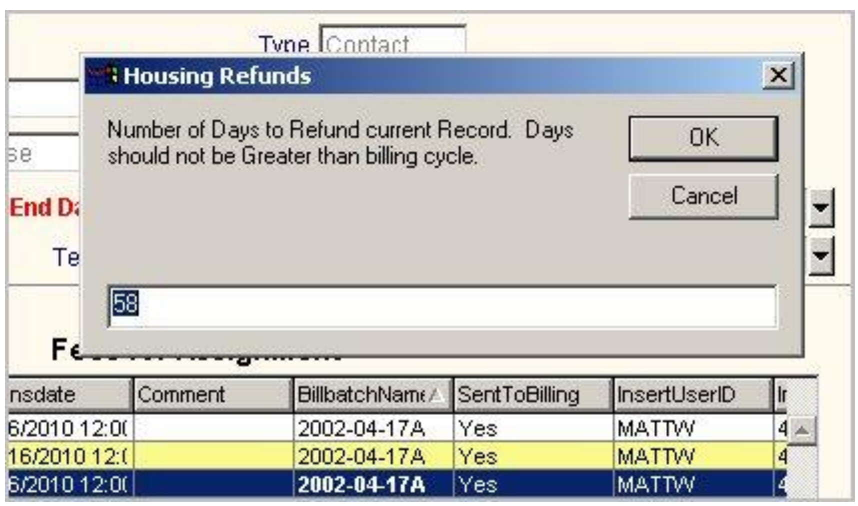

Figure : Applying Refund window

10. Confirm, or change, the number of days to be refunded and click OK.
11. You will be prompted to "**Charge Early Termination Fee**". Click **Yes** or **No** as appropriate.
12. Click **Update** to save changes.

***Note**: The changes made to fee transactions will be sent to Billing the next time the transfer process is run (using appropriate criteria to include the changes).Copy Term*

The copy term window will allow you copy all room fees, room assignments, and student fees that have been setup from one term to another. You will also be able to selectively choose only those students who are actually remaining in their room next term.

Copy Room Fees / Generate Room Fees

The top section allows you to copy the Room Setup Fees to another term. The center section generates the fees for that new term. The data grid on the bottom allows you to modify fees that have changed or delete fees that are no longer correct. CAMS prevents users from copying over a term that has previously been copied to, so modifications to the copied to term are not inadvertently overwritten.

Step-by-Step: Copy Room Fees / Generate Room Fees

1. From the **CAMS Enterprise Home** page, click **Housing >Setup >Copy Term**. The Copy Term form opens. The Room Fees tab is displayed.

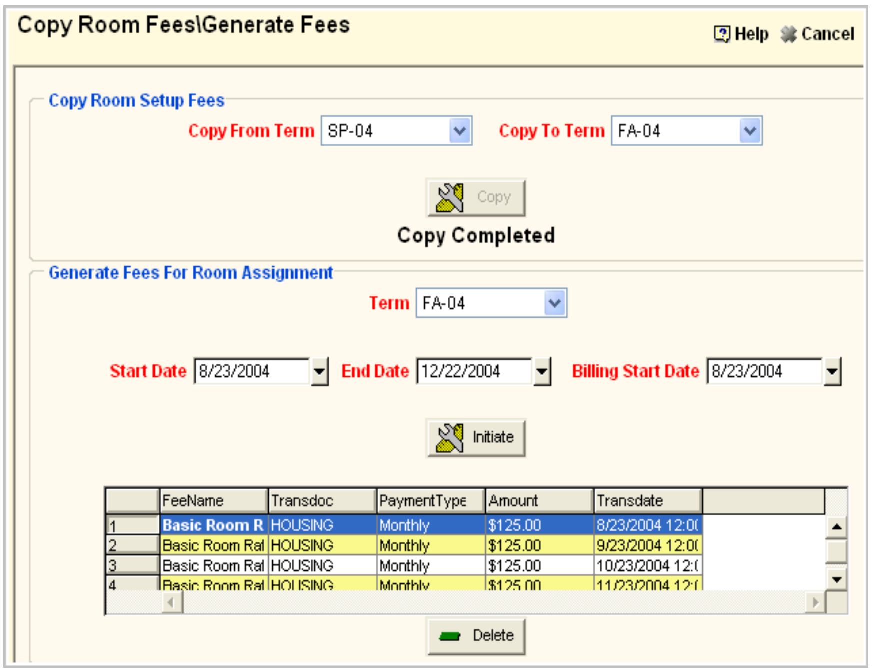

Figure : Copy Room Fees \ Generate Fees window

2. Select the term you want to copy fees from and then select the term you want to copy to. Then click the **Copy** button. When the copy is finished it will display “Copy Completed”.
3. In the Generate Fees For Room Assignments the Term information is filled in automatically based on the “Copy To Term” previously selected. Click the **Initiate** button to generate fees for the new term. The fees will display in the lower data grid section.
4. To delete a fee that no longer applies highlight the fee and click the **Delete** button.

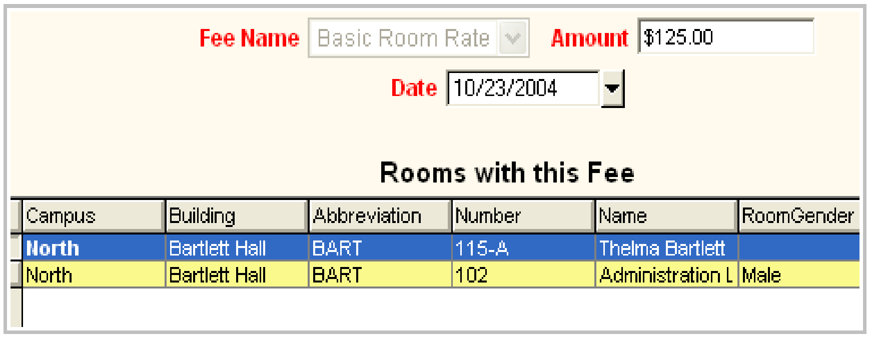

Figure : Edit Copied Room Fee

Or to change a fee, double-click the fee and change the amount and/or date.

Note: *The Edit Copy Room Fee window also shows you what rooms the fees are applied to. If this is not correct you must reassign room fees to those rooms that need to be changed as shown in the* ***Applying Room Fees to Selected Rooms*** *section earlier in this document.*

Copy Room Assignments

Step-by-Step: Copy Room Assignments

After copying room fees and generating fees click the Room Assign tab. The Copy Room Assignments form displays.

1. Select the term for which new assignments will be created. Default term will be populated with the term entered in the previous window.
2. Click the box **Only get latest** to display students' latest room assignments only.
3. Click **Find** to display list of student room assignments for the selected term.
4. Select students that will remain in the same room by clicking the box (which will place an "X" in the box) to the left of the name in the data grid.

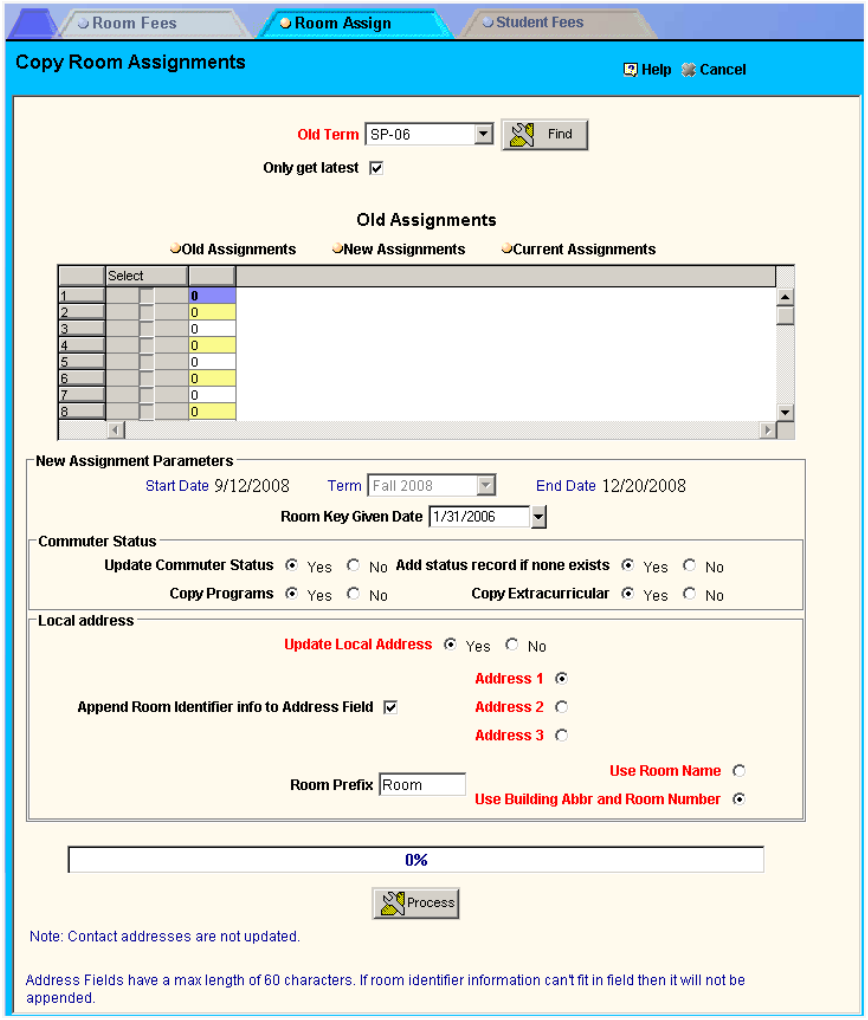

Figure : Copy Room Assignments window

To see a list of current room assignments for the new term click the Current Assignments option. If there is a plus (+) sign next to the room listing then there are students currently assigned to the room. Clicking the plus sign will show you those students.

5. Select the Old Term you want to copy from and click the **Find** button.
6. **Old Assignments** are the assignments associated with the Old Term. Select the students that will be remaining in the same rooms for the next term (shown in the Term field below the data grid.) Use the Select All button to quickly select all students.
7. Click the **New Assignments** option to see a list of student assignments that will be copied before you actually process them.
8. Click the **Old Assignments** option to return to the list of student assignment for the designated term.
9. Enter a Room Key Given Date.
10. Choose to Update Local Address.

If Update Local Address is set to **Yes**, then the student's current active local address will change to the room's address. A record of the student's previous local address will still be maintained in the student's addresses.

11. Once you have the students selected click **Process**. A notice will appear when the copy is complete. Click **OK**.

Copy Student Fees

Step-by-Step: Copy Student Fees

1. You do not need to do any of the previous steps to copy student fees from one term to another. Click on the **Student Fees** tab.
2. Select your **Copy From** and **Copy To** terms
3. Click the **Copy** button and then confirm the copy.
4. When the copy is finished it will display “Copy Completed”.

***Note:** The Copy Student Fee function should not be used for any fees that are NOT recurring in the term to which you will copy. For example, a room deposit charged once per Academic year should not be copied forward from the first term to the next term, as this could result in unwanted duplicated fees.*

Mass Housing Charges

Use the Mass Housing Charges functionality to assess housing or incident fines for a group of students based on criteria selected, such as building and room numbers. For example, if damages were caused on the second floor of a dormitory, fines for this damage could be applied to all students housed on that floor at one time. This process creates a billing batch with the appropriate charges/fines included.

Step-by-Step: Apply Mass Housing Charges

1. To access the **Mass Housing Charges** window from the CAMS Enterprise Home page click **Tools >Processes >Housing**. The **Criteria** tab of the Mass Housing Charges window displays.

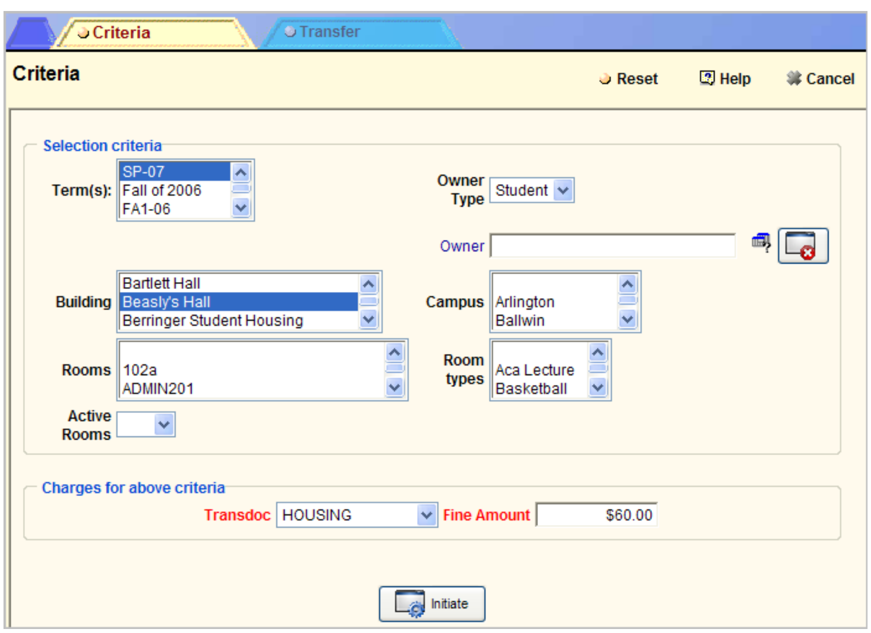

Figure : Mass Housing Charges window

2. Select the appropriate criteria to narrow the list of returned matches. For example, use the Term, Building, and Rooms fields to get a list of students housed in a certain building and rooms if you want to charge a fine for damage done in a common area of the building.
3. Click **Initiate** to get a list of all records that match the criteria selected.
4. Click **Export** to export the list in .txt format, or **Transfer** to create a transfer batch for these charges. You may export first and then transfer if desired.
5. Clicking Transfer displays the **Batch Comment** field, required and the **Effective Transaction Date**, required. Populate the required information and then click **Transfer**. Upon completion a confirmation message “Transfer successful” displays. The transferred charges are now available in **Billing >Batch.**

Mass Housing Charges

CAMS Enterprise provides the ability to charge en mass all students in a dormitory, by specific rooms, or specific students for damages or other necessary fees related to housing.

Step-By-Step: Charge Students for Housing Damages

1. From the **CAMS Enterpise Home** page, click **Tools >Processes >Housing >Mass Housing Charges**. The Mass Housing Charges page displays.

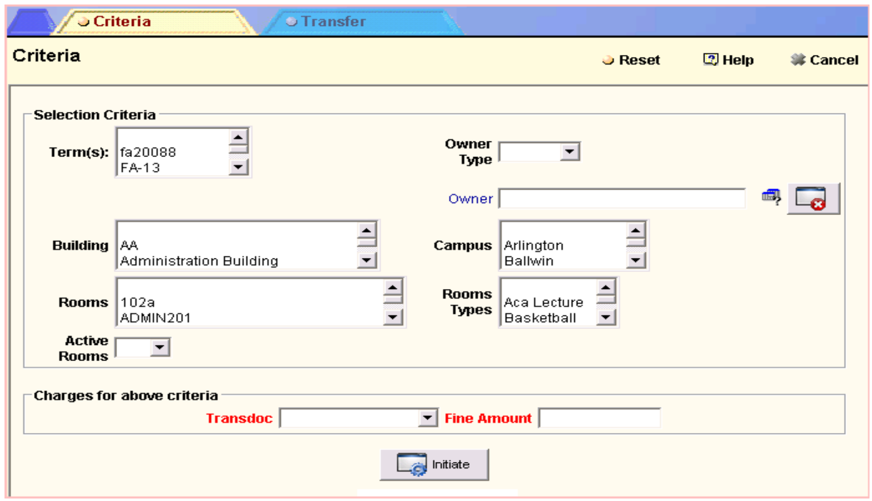

Figure : Mass Housing Charges

2. Select the criteria that will identify the students to be charged.
3. Select the specific transdoc to be used and the amount to be charged to each student.
4. Click **Initiate**. The Transfer screen displays with the list of students, faculty and contacts.

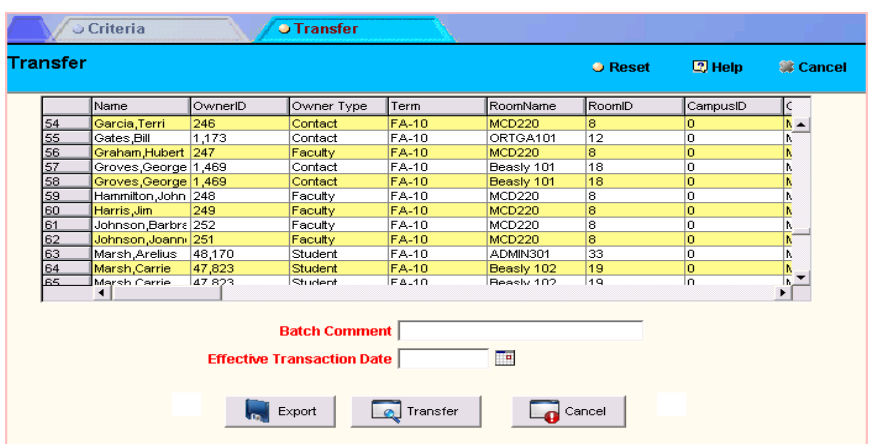

Figure : Transfer Screen

5. Enter in the **Batch Comment**, which will be used by Billing to determine what the batch relates to.
6. If necessary, enter the **Effective Transaction Date**. This would be the date that the charges are associated with.
7. Click **Export** to export the data to a file such as Excel and **Transfer** to transfer the transactions to Billing.

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