View Student Financial Account Information in PeopleSoft

Campus Community > Student Services Center > View Financial Aid FAFSA received
View Financial Aid Status Review Form
Looking for EFC
Cost of Attendance
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Viewing Student Account Information: PeopleSoft Training

This business process guide will show you how to view a student’s Financial Account Information at ASU. This document can be printed and used as a desk-side-reference, as you look at the other, on-line portions of this class in Blackboard.

There are three online classes (found in the same general location as this one) that you should take, in addition to this one.

- OASIS: FERPA Refresher (Required)
- OASIS: General Navigation in PeopleSoft (Recommended)
- OASIS: Advisors: Intro to PeopleSoft – View Student Data* (Recommended)

To enroll, log into the Blackboard system and click on the “Courses” tab. Next, type OASIS in the Course Search box and click the “GO!” button. Finally, locate the courses listed above and begin your journey through the OASIS system.

Agenda

- Navigating to Student Financial Information
- Viewing a Student’s Record
- Set your User Defaults
- Add a favorite to your menu
Navigating to the Student Financial Account Information

Before you can begin any work, you must login to the system.

The link to do so is https://hrsa.oasis.asu.edu/
You should see a login screen similar to the one below:

![Login Screen]

To set trace flags, click [here](#).
To view a customer’s accounts receivable detail, navigate to the *Student Services Center* by clicking the *Campus Community link*.

This is the PeopleSoft Home Page.
Step 2: Click on the **Student Services Center** link.
View Student Financial Account Information

Step | Action
--- | ---
3 | Enter the search information about the student
4 | Click on Search

The Student services page starts with a search for the student. You can search by:

- Affiliate ID (in the ID field),
- ASU ID (In the Campus ID field),
- SSN (in the National ID field) or by
- first or last name.
Step | Action
--- | ---
5 | Click on the **Finances** Tab

This is the Student Services Center. Notice the tabs across the top. This training class will focus on the “finances” tab, to continue, please click this tab now.

Note: Training related to the information displayed on the other tabs is available from the same locations as this class.
Step | Action
--- | ---
6 | (optional) If applicable, click on the **Service Indicator** symbol

As you can see by the example shown, you can view the student’s total balance due and anticipated financial aid. In the Due Charges section, you will see a line by line detail listing of all unpaid charges on the account.

A Student can have various holds placed on his/her account that either prevent services (negative service indicator) or are information that is passed between staff members (positive service indicators). For purposes of this training class, we will only be discussing negative services indicators.

Negative service indicators are denoted by a red circle with a slash through it (aka a ghost buster symbol) in the upper right section of the page next to the ID. To view details about the service indicator, click on the symbol.
Step | Action
--- | ---
7 | Click on the **Details** link

In each of the negative service indicator boxes, you will see high level information about the indicator, for example, you can see when it was placed, the placing department and the reason it was placed. To view further details about why it was placed and to see which services are impacted by the hold, click the Detail link in the upper right section of the page.
Step | Action
--- | ---
8 | Click on View All

These are the details for one service indicator.

Notice the highlighted "Scroll Area". Students can have multiple negative service indicators and multiple details about each indicator. It is important that you view all service indicators and details when talking with the student. In this example, you are only seeing the first 2 of 5 entries. To view all entries in the list, click on View All.
From this view of service indicators, you can see more specific information about who placed the service indicator on the account.

PLEASE NOTE: FOR ALL NEGATIVE SERVICE INDICATORS THAT BEGIN WITH SF, PLEASE REFER CUSTOMER QUESTIONS TO THE COLLECTIONS OFFICE AT (480) 965-5220, NOT THE PERSON IDENTIFIED IN THE “PLACED BY” FIELD.

In the Services Impacted box, you can see which services are being withheld and contact referral information. In order for students to have negative services indicators removed, typically, they must pay their past due balance in full. Only the SF1 service indicator is automatically added/removed upon payment. All other SF service indicators require manual intervention. Contact the Collections Office at (480) 965-5220 for assistance with removal of any SF Service Indicator.

At the bottom of each screen is a return button (not shown) that will return you to the previous pages. You can use these buttons to return to the student finances tab.
Step 9: Click on the View Student Account button.

We have returned to the finances tab of the student center.

In most cases, when talking with customers about their account balance, the information displayed on the Student Services Center page will provide you with the details you need to assist the student. However, if you find the need for additional information, click the “view student account” link located in the upper right section of the page.

Clicking this link will move you from the Student Services Center to the Customer Account Detail pages where you can view additional transaction information for this student such as paid charges, payments made, and refund information.
Step | Action
--- | ---
10 | Click on **Account Details**

The Customer Accounts page displays summarized account detail by Account Type and Term. For example, all Residential Life transactions will be lumped together in the Res Life row for a given Term.

Click the Account Details link on the right side of the row to view the individual details of the transactions included in a particular Account Type.

Most transactions will be viewable by term within AcctTerm Account001. Account type is not a field that is viewable by students. It is only used to organize data for staff use.

Remember, to ensure you are viewing ALL Account Types, look at the blue bar to ensure all items are displayed. In this example items 1-6 of 6 are displayed. However, if you see items 1-6 of 10 displayed on the blue bar, this indicates there are 4 additional transaction rows that you are not viewing. Simply click the View All link to see ALL transaction rows. This functionality is true throughout all PeopleSoft pages, so keep this in mind as you move from page to page.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td>Click on the <strong>Item Details</strong> link</td>
</tr>
</tbody>
</table>

From this view, you can see the individual transactions associated with a particular Account Type as well as the “Term” each transaction is associated to. In this example, the Account Details link for the SAAR Cur Account Type was selected.

All transactions in PeopleSoft have a term. For payments and charges that are not inherently term specific, a default term is assigned, based on the posted date.

From here, you can see two transactions associated to the Spring 2007 Term. Click on the Item Details to drill down to additional detail about each of the transaction.
Step | Action
--- | ---
12 | Click on the Return link.

This view displays the individual student health transaction in the Details section as well as any payments that have applied to the charge. Click the Return button to go back to the account details page.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>13</td>
<td>Click on the <strong>Return</strong> link again.</td>
</tr>
</tbody>
</table>

To go back to the overall view, click the Return button located in the lower left section of the page.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>14</td>
<td>Click on the <strong>Account Details</strong> link</td>
</tr>
</tbody>
</table>

For the next example, click the Account Details link for the Acct Term/ACCOUNT001-2007 Summer Account Type/Account Number row.
Step | Action
--- | ---
15 | Click on the **Item Details** link

This view displays all transactions associated to the Summer 07 Term.

Even more information is available per transaction by clicking the Item Details button. To see an example of this view, click the Item Details link for the Federal Subsidized Loan transaction.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>16</td>
<td>Click on the <strong>Return</strong> link</td>
</tr>
</tbody>
</table>

This view details the original transaction (item) in the first box, shows the details of the item in the second box (in this case the credit was split between two transactions), and finally the allocation details are presented in the third box.

Click the Return button to go back to the Customer Accounts view.
To view one final example, click the Account Details link for the Acct Term/ACCOUNT001-2007 Fall Account Type/Account Number row.
Step | Action
---|---
18 | Click on the **Item Details** link

This view displays all transactions associated to the Fall 2007 Term.

Following the previous example, you can click the Item Details link to the right of any item to view the details of that particular item. Click the Return button in the lower left section of the page to return to the Customer Accounts page.
### Step 19

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>19</td>
<td>Click on the <strong>Return</strong> link</td>
</tr>
</tbody>
</table>

As you can see, the original tuition charge was $8427.00 and was reduced by $1407.00, most likely due to a class drop. You can also see that no payments have been applied to this charge.

To return to the list of transactions, click on the *return* link.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>20</td>
<td>Click on the <strong>Return</strong> link</td>
</tr>
</tbody>
</table>
Step | Action
---|---
21 | Click on the **Detail Trans** link

There are multiple ways to view the account details as noted by the links located under the account details.

The first link is Detail Trans. Click this link to display the view.
Step | Action
--- | ---
22 | Click on the **Return** link

This view displays all transactions for a student's account. The page can be sorted by clicking on the column headers.

Notice how Item numbers can be repeated. For example, there are 2 lines with Item Nbr 000000000000006. Line sequence 1 (toward the bottom) is the original charge, and line sequence 2 is the reversal of that charge.

Students have multiple views of their account data, but all views are summarized to a certain extent. They will not be able to view all detail transactions presented in this table.

This page may be helpful for Collections Office staff who audit account transactions.
Step | Action
---|---
23 | Click on the **Item Summary** link
## Step 24

**Action**

Click on the **Return** link

This view presents transactions in a more summarized manner, by item type and due date.

Click the Return button to return to the Customer Accounts view.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>25</td>
<td>Click on the <strong>Items by Term</strong> link</td>
</tr>
</tbody>
</table>
This view organizes the transactions by the term they are associated to and allows you to easily find term related transactions. Please note that this view may show a Total other than $0 for a term because this view does not split payments and financial aid between terms. Balance due should NOT be reported from this view! This page can be rather long.

The return button is at the bottom of the page (not shown here)
Step | Action
--- | ---
27 | Click on the **Items by Date** field
In this example, the items are organized by Posted Date. Note that in the Sort Detail By box, you can change the details view by clicking the appropriate radio button depending on how you want the information displayed.

You may notice that when sorting the page, the Running Total in the right hand column does not update correctly.
To view only unpaid charges, click the Due Charges link.
This example displays only items with a due amount not equal to zero. It also displays a cumulative total due balance. Click the Return button to return to the Customer Accounts page.
This is the end of this section
**Job Aid – View a Student’s Financial Account**

This job aid assumes you are logged into PeopleSoft and are at the home page.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click on <strong>Campus Community</strong></td>
</tr>
<tr>
<td>2.</td>
<td>Click on <strong>Student Services Center</strong></td>
</tr>
<tr>
<td>3.</td>
<td>Enter search criteria for your student and press <strong>Search</strong></td>
</tr>
<tr>
<td>4.</td>
<td>Click on the <strong>Finances Tab</strong></td>
</tr>
<tr>
<td>5.</td>
<td>View any negative Service indicators by clicking on the <strong>Service Indicator Icon</strong> (red circle)</td>
</tr>
<tr>
<td>6.</td>
<td>View Account details by clicking on the <strong>View Account Details</strong> button</td>
</tr>
<tr>
<td>7.</td>
<td>Click on the links to view account details.</td>
</tr>
</tbody>
</table>
Set Your User Defaults

You can pre-set the values in commonly used fields so that when you see that field on a page, the value is pre-typed in. This does not lock the value in place. It’s just like someone comes along and types in the value right before you see the page.

To navigate to this page: Home > Set up SACR > User Defaults. Your screen should look like this:

Each Tab contains different fields. All the fields you are interested in are on the User Defaults 2 tab. We suggest that you set the Academic Institution to ASU00, and set your Career, Group and Term to your commonly used values. In most cases, you should set these values: Set id = ASU00, Business Unit = ASU00, Institution Set = ASU00
Add Favorites

The last item this lesson will cover is how to add frequently used pages to your favorites. This function is very convenient because it allows you to “bookmark” these pages so you won’t have to navigate to them every time. To add a page to your favorites, all you need to do is to navigate to the page you want to bookmark and then click the Add to Favorites link near the top of the page. Then, you can navigate to My Favorites and see the link there. You can create your own name for your page. The page shot below shows the Search/Match added to My Favorites:

You can also edit your favorites at any time.
FERPA

The purpose of this lesson is to provide introduction to FERPA and the disclosure of student information. Much of this information has been excerpted from the Office of the Registrar website (http://www.asu.edu/registrar).

GENERAL INFORMATION
The federal Family Educational Rights and Privacy Act (also known as FERPA, and/or the Buckley Amendment) afford students certain rights with respect to their education records. They are:

1. **The right to inspect and review the student’s education records within 45 days of the day the university receives a request for access.**

   Students should submit to the registrar, dean, head of the academic department, or other appropriate official, written requests that identify the record(s) they wish to inspect. The university official will make arrangements for access and notify the student of the time and place where the records may be inspected. If the records are not maintained by the university official to whom the request was submitted, that official shall advise the student of the correct official to whom the request should be addressed. **Note: Students must provide photo identification in order to access their education records.**

2. **The right to request the amendment of the student’s education records that the student believes is inaccurate or misleading.**

   Students who believe their record is inaccurate or misleading should write to the university official responsible for the record. Clearly identify the part of the record they want changed, and specify why it is inaccurate or misleading.

   If the university decides not to amend the record as requested by the student, the university will notify the student of the decision and advise the student of his or her right to a hearing about the request for amendment. Additional information about the hearing procedures will be provided to the student when notified of the right to a hearing. **Note: FERPA does not address grade disputes or grievances, which are pursued through other university and/or college procedures.**

3. **The right to consent to disclosures of personally identifiable information contained in the student’s education records, except to the extent that FERPA authorizes disclosure without consent.**

   One exception which permits disclosure without consent is disclosure to school officials with legitimate educational interests. A school official is a person employed by the university in an administrative, professional, supervisory, academic, research, or support position; staff in the Alumni Association and ASU Foundation offices; a person or company with whom the university has contracted (such as an attorney, auditor or collection agency); a person serving on the Board of Regents; or a student serving on an official committee, such as a disciplinary or grievance committee, or assisting another school official in performing his or her tasks. A school official has a legitimate educational interest if the official needs to review an education record in order to fulfill his or her professional responsibility. **Note: A parent of a dependent student may challenge denial of access to the dependent student’s record by producing the most current copy of Internal Revenue Form 1040. (Dependency is defined in Section 152 of the Internal Revenue Code.) If that form lists the student in question as a dependent, the parent will be required to sign an Affidavit of Dependency which affirms that the student is his/her tax dependent. The affidavit will be retained by the University Registrar’s Office, and must be renewed each tax year. Upon**
receipt of these documents, the dependent student records will be made available to the parent as specified under FERPA.

4. The right to file a complaint with the U.S. Department of Education concerning alleged failures by Arizona State University to comply with the requirements of FERPA.

Students are encouraged to first contact the University Registrar’s Administrative Office at (480) 965-7302. A complaint may be filed with the Department of Education at the following address:

**Family Policy Compliance Office**
U.S. Department of Education
400 Maryland Avenue, SW
Washington, DC, 20202-4605

NOTE: While FERPA applies only to students (as opposed to applicants), ASU employees are urged to err on the side of caution whenever disclosing information. When in doubt, do not disclose the information and refer to your supervisor or the Office of the Registrar as appropriate.

Now that you know what FERPA is, how can you tell if the student has elected to place a FERPA hold on their record? The answer lies on the page displayed below:

![FERPA privacy shade](FERPA privacy shade)

When you apply FERPA control to restrict data for a student, the system attaches a FERPA window shade privacy button to that individual's records in your database. This icon indicates the student has a FERPA hold on their record. You can click the icon to see the specific information about the hold.
Terminology and Shortcuts

SIS to PeopleSoft

Some of the common fields you have used in SIS will have new names in PeopleSoft:

<table>
<thead>
<tr>
<th>SIS</th>
<th>PeopleSoft</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASU ID</td>
<td>Campus ID</td>
</tr>
<tr>
<td>Affiliate ID</td>
<td>ID</td>
</tr>
<tr>
<td>SSN</td>
<td>National ID</td>
</tr>
</tbody>
</table>

Common Values

Some of the common fields you have used in SIS will have new names in PeopleSoft:

<table>
<thead>
<tr>
<th>Field</th>
<th>Common Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Institution</td>
<td>ASU00</td>
</tr>
<tr>
<td>Term</td>
<td>2077 (Fall 2007)</td>
</tr>
<tr>
<td></td>
<td>2071 (Spring 2007)</td>
</tr>
<tr>
<td></td>
<td>2074 (Summer 2007)</td>
</tr>
<tr>
<td></td>
<td>2079 (Winter 2007)</td>
</tr>
<tr>
<td>Academic Career</td>
<td>UGRD or GRAD</td>
</tr>
</tbody>
</table>

Moving Among Fields

To move among the data-entry fields on a page, press the tab key or click the field once. Pressing tab moves you one field at a time in a sequence determined in the page definition. Pressing tab also rests on prompts to give you the option of viewing the prompt table or calendar. To open a prompt or calendar, you can press enter. Or, to get to the next field, press tab again. Press Shift Tab to move backward rather than forward in the tabbing order.
**Required Fields**
In most applications, required fields are marked with an asterisk. You must enter data into that field to continue on to the next field or save the page. If you save the page without entering required data, the field turns red and an error message appears on the page. Click OK within the error message, and then enter the correct data in that field. Required fields are often drop-down list boxes or are accompanied by a prompt button to help you enter the correct data.

**Navigating through different areas**
The following table describes the buttons and links that might appear on your grid or scroll area.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Add" /> Add</td>
<td>Click to insert a new row after the current row.</td>
</tr>
<tr>
<td><img src="image" alt="Delete" /> Delete</td>
<td>Click to delete the current row of data.</td>
</tr>
<tr>
<td><img src="image" alt="Show Next Row" /> (Show Next Row)</td>
<td>Click to display the next row or set of rows of data.</td>
</tr>
<tr>
<td><img src="image" alt="Show Previous Row" /> (Show Previous Row)</td>
<td>Click to display the previous row or set of rows of data.</td>
</tr>
<tr>
<td><img src="image" alt="Show All Columns" /> (Show All Columns)</td>
<td>In a tabbed grid only, click to expand grid columns to the right so that tabs are no longer needed.</td>
</tr>
<tr>
<td><img src="image" alt="Show Tabs" /> (Show Tabs)</td>
<td>In a tabbed grid only, click to return the expanded grid to its tabbed state.</td>
</tr>
</tbody>
</table>

**Customize**
Click to access the customization page for that grid, which enables you to sort by column and reorder, hide, and freeze columns.

**Download**
Click to display a new browser window, showing the contents of the grid in a spreadsheet-like format.

**View All**
Click to display the maximum number of rows available to be viewed at once on a page. When this feature is enabled, the link morphs to read View x so that you can return to the original setting. The value of x can change, and is set by the application developer.

**Find**
Click to find a row of data containing a specified search string.

**First**
Click to access the first row or set of rows of data.

**Last**
Click to access the last row or set of rows of data.
Keyboard Shortcuts

There are also keyboard shortcuts for all of the above buttons and links listed below:

(Hot keys perform immediate actions. When you press one, the designated action occurs. Note that several hot keys perform different functions depending on the page that you are on, such as a transaction page or a search page.)

ALT+1 Saves a page in a transaction.
ALT+2 Returns to the search page from the transaction page.
ALT+3 View the next row in the list when the button is active.
ALT+4 View the previous row the in list when the button is active.
ALT+5 Accesses the Look Up page.
ALT+6 Opens the pop-up window on a page.
ALT+7 Inserts a row in a grid or scroll area.
ALT+8 Deletes a row in a grid or scroll area.
ALT+0 When in Expert Entry mode, activates the Refresh button, which validates the data entered on the page.
ALT+. View the next set of rows in a grid or scroll area.
ALT,, View a previous set of rows in a grid or scroll area.
ALT+/ Finds data in a grid or scroll area.
ALT+‘ View all rows of data in a grid, scroll area, or search page results list.
ALT+\ Toggles between Add a New Value and Find an Existing Value on a search page.
CTRL+J Displays the system information page.
CTRL+K When on a search or transaction page, accesses a page with a list of keyboard navigation shortcuts using hot keys and access keys.
CTRL+Y Toggles the menu pagelet between collapse and expand.
CTRL+TAB Toggles the focus through the frame set.
ENTER Activates the OK button, where appropriate.
ESC Activates the Cancel button, where appropriate.

One last important item to know is the online Help. There is a link in the upper right hand corner that says “Help” and this link will take you to the help topic related to the page you are currently working with. You must be in the element for the help topic to be connected.
Glossary

academic career - In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).

academic institution - In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

academic organization - In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.

academic plan - In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.

academic program - In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.

administrative function - In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.

admit type - In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish different types of applications such as first-year applications, transfer applications and readmitted applications.

campus - In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit that belongs to a single academic institution that uses a unique course catalog and that produces a common transcript for students within the same academic career.

category - In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.

checklist code - In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.
course - In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab.

effective date - A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.

inquiry access - In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.

institution - In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

personal portfolio - In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.

primary name type - In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.

prospects - In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution.

QBU (Query Based Update) a process in PeopleSoft that runs overnight which identifies a select population of applicants and performs predefined actions on the population. There are many different QBU processes running every night.

search/match - In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.

service impact - In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.

service indicator - In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.

update access - In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.
Next steps

In order to get access to PeopleSoft, you must complete these steps:

1. Complete the on-line FERPA training
   a. Log into Blackboard from the ASU homepage. Click on “ASU Interactive navigation?”, then the “MyASU Courses” link. The blackboard login screen will appear. Log in with your ASURITE ID and password.
   b. Click on the Courses tab in the upper left corner of the screen.
   c. In the search field, type in OASIS, and click search
   d. Available courses will be listed, click on the enroll button on the far right side of the page for the OASIS: FERPA refresher course.
   e. Click Submit.
   f. Click OK.
   g. This will put you into the FERPA class.
   h. You must score at least 140 points on the test to get credit for the class. You can take the test multiple times.

2. Set your user profile in the PeopleSoft System
   a. Log in to the PeopleSoft system
      i. https://hrsa.oasis.asu.edu/
      ii. Log in with your ASU RITE ID and network password.
      iii. The system will create your user profile
   b. Click the “Sign out” link to log out.

3. Apply for access to Peoplesoft;
   
   This class makes you eligible for these roles:
   **SF VIEW ONLY ACCESS**
   **SF Student Services Center**
   You can find these in the Student and Administration (SA) - Student Financials (SF) part of the roles list.

   Be sure to include specific information about your job responsibilities so the data trustee will have the necessary information to approve your request.

   Here is the link to apply for access: https://ep.oasis.asu.edu/

   Here are step by step instructions for how to apply:

   Here is a link to all of the different instructions related to this process.
   http://www.asu.edu/oasis/support/Access.html
What will happen next?

After you request access:
1) Your supervisor will get an email and will go into the system to approve your request.
2) You will get an email and go into the system to acknowledge your new role.
3) The data trustee will go into the system and ensure that your job responsibilities require the roles you requested and verify that you have had the correct training. and everything looks correct
4) The OASIS security team will complete your request and grant you access
5) You and your supervisor will get an email notifying you of your new access.

Here’s what you can do to speed your request and save time for everyone who is part of the manual process behind the electronic form.

1. Spend a couple of minutes and look at the description of the role you are requesting. Check the roles you need or that employee will need. Avoid asking for update access to items that are outside your area of responsibility.
2. Include information in the comments field. Give a good description of why you need the access you are requesting. Include your department or unit. In the future, the security process will know the department where you work but this will not happen until the human resources job data is converted. If you don’t give your department, the data trustee may need to research that before granting you access.
3. Watch the process of your request. Using the on-line system you can tell the steps that have been completed for your request.

Remember the project wants everyone equipped to do their job and be prepared to do it in the new system. The data trustees are advancing toward this goal by being important members of the project teams as well as serving as a data trustee. And finally, we will work to improve the access process as we adapt to the new system.

Questions? Email the Oasis security team

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