Withdrawals and adjustment calendars: a how to process

Session #155
Monday March 17th 1:15 p.m.
HEUG 2003 Conference - Dallas
Presenter #1
Craig R. Stevens
IS System Development Services Senior
University of Wisconsin-Madison

Presenter #2
Myrna Fitzpatrick
Senior Technical Analyst
PeopleSoft GSC
Presenter #1 Background

I have worked for the university for 10 years. I have worked on the development of this process since going to this software in version SA 7. We are now in version SA 8. I have built and maintain the current structure we use to assess tuition and fees.

Presenter #2 Background

I have worked in Higher Ed Information Systems for 17 years. Prior to joining PeopleSoft, I was on a project team responsible for the implementation of SA 7.0 Canadian at one of the first four customers in Canada.
This presentation will cover U.W. Madison’s withdrawal scenarios and why we do it this way from both a records and financials perspective.
WITHDRAWALS
Things to check first:
Check for holds

Tuition Calculation
Stevens, Jack Carl
ID: 0003629756

Academic Institution: UW-Madison
Term: 2002 Fall Semester
Primary Program: Landscape Architecture
Override Billing Units: 
Override Init Enrl Fee: 
Tuition Residency: 0.000
Tuition Calc Required: 

Business Unit: UWMSN SF
Billing Career: Undergraduate
Campus: Main Campus-Madison
Projected Bill Units: 
Override Init Add Fee: 

Tuition Group: Undergraduate
Tuition Calc Date Time: 01/07/2003 10:46AM

Negative service indicators
WITHDRAWALS

Things to check first:
Check courses and sessions and note dates of earlier drops
WITHDRAWALS
Things to check first:
Note effective date of withdrawal action

WITHDRAWAL FORM - Current Date: January 07th, 2003
(Deadlines at a Glance)

<p>| STUDENT8: |</p>
<table>
<thead>
<tr>
<th>LAST NAME</th>
<th>FIRST</th>
<th>MIDDLE</th>
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<tbody>
<tr>
<td>STEVENS</td>
<td>JACK</td>
<td>C</td>
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<tr>
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<th>PROGRAM &amp; YEAR</th>
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<tr>
<th>Term/Year</th>
<th>Reason</th>
<th>WITHDRAWAL DATE</th>
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<tbody>
<tr>
<td>1032 - Fall 2002</td>
<td>Personal</td>
<td>09/27/2002</td>
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Student Mailing Address:

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WITHDRAWALS
Things to check first:
Note if withdrawal is for prior academic term

Term prior to current term
Setup:
Charge by term/refund by session

Adjust by session

One drop reason code set as default

Note: 54 sessions
Tuition group setup

Note: an override adjustment calendar
Override adjustment calendars
We have one for each refunding percentage

By term start date
Must have one withdrawal and one add/drop reason code
With default set
Tuition group setup

Note: we do not use this functionality
Withdrawal Scenario:
No courses dropped and effective date is in current refunding period.

Click here to post transaction

Effective date from request form goes here

Date of transaction goes here
Posting the withdrawal gives a drop date from the “Last Date of Attendance” and reason of “WDRW”.

Reason was personal but lists here as WDRW
Name: Stevens, Jack Carl  
ID: 0003629756  
Campus ID: 9026513748  
Term: 2002 Fall  
Career: Undergrad  
Institution: UW-Madison

| Class Nbr: | Human Dev: Ed Effectiveness | Lecture |
| Subject: | COUN PSY | Catalog Nbr: | 115 | Class Section: | 028 |
| Academic Group: | School of Education | Undergrad | Session: | DEE |

| Status / Reason: | Dropped | Dropped (was enrolled) | Status Date: | 01/07/2003 |
| Enrollment Add Date: | 05/02/2002 | Enrollment Drop Date: | 09/13/2002 |
| Grade Date: |  | Primary Program: | Landscape Architecture |
| Grading Basis Date: | 05/02/2002 | Repeat Date: |  |
| Grade Points Per Unit: | 0.000 | Repeat Scheme: | University Normal Repeat |
| Grade Points: | 0.000 | Main Content: | |
| Grading Scheme: | Standard Grading Scheme | Include in GPA: | Yes |
| | | Audit Grading Basis: | Yes |
| | | Earn Credit: | Yes |
| | | Mandatory Grading Basis: | Yes |

Last date of attendance is drop date
Change last date of attendance to subsequent day. This allows the process to calculate using add/drop logic versus withdrawal, which we have set to give no refunds: WDRW0%.

Changed from 13 to 12th in this case to retain the date in the 100% refund period that ended on the 13th. Making it the 14th or any other day other than the original has no effect on the add/drop processing.
Why we do it this way.

- We have been tweaking this process for years and decisions made early have effected our current process.
- We have been using this product since version 7.0, when we went live.
- Using only the add/drop processing versus both this and the withdrawal processing has cut our testing and potential problems with patches and fixes.
- Originally we had problems with how it was working in 7.0 and so we stopped using the withdrawal processing for tuition calculation.
- You may find that it no longer acts unexpectedly, but after you have staff trained why mess with success.
- Whatever the drop date on the courses will be the refunding percentage for the course dropped.
- Financial aid needed the drops to be the day it was processed because of federal guidelines that started a 30 day clock for them.
Withdrawal Scenario:
No course drops and effective date is not in current refunding period.

Refund date is in 100% period
Processing date and course drop dates when posted
Override withdrawal schedule WDRW100% gives 100% on all Courses dropped on 10/05/2002. Posted and remains this date.
What we are doing and why?

• “Last Date of Attendance” and “Override Withdrawal Schedule” are tied to tuition calculation processing. Whatever course has a drop date that is the same as the “Last Date of Attendance” will receive the refund that is set by the “Override Withdrawal Schedule”, which in the above example was 100%.

• If I had not placed an override it would have given a zero percent refund, because it would have run to the withdrawal adjustment calendar placed on the tuition group or failed to find calculate.

• If I had changed the “Last Date of Attendance” to the subsequent day the courses would have given a 0% refund because the drop date of 10/05/02 on the 1032STD calendar, attached to the term fee, gives 0% for that date in the setup.
Withdrawal Scenario:
Some course drops and withdrawal effective date is in current refunding period.

Standard processing, post and change Last Date of Attendance To subsequent day.
What this processing is doing

• Since these courses are dropped in the same refunding period there is no need for an Override Adjustment Calendar.
• Courses dropped previously by the student over the web have already been processed for refunding purposes and there is no need to make any adjustments.
• As long as no courses are dropped on the web that correspond to the date in the “Last Date of Attendance” there is no problems. Since the request was dated to withdrawal effective on the 10\textsuperscript{th} it isn’t likely. But you had better check the dates of prior drops or you will get burned. We have seen students drop some courses early in the day we process the withdrawal.
Withdrawal Scenario:
Some course drops and effective date is not in current refunding period.

Effective date of withdrawal is 9/25/02, which is in the 50% refund period.
Processing date is in no refund period.
Override uses 50% adjustment calendar on all 10/15/2002 drops.
Need to check drop dates to analyze what the previously dropped courses drop date will refund.

Course dropped by student. This date still give 50% refund and does not need to be changed.
What we are doing and why?

• The effective date of the withdrawal is in a prior refunding period than what the current date would give.
• Courses dropped prior to the withdrawal process need the dates noted to check to see what refund they give.
• An override adjustment calendar is used in the withdrawal to give the desired refund amount.
• Prior course drops are adjusted to match the withdrawal dates of the other withdrawn courses if the refund percentage is less than the override adjustment calendar amount, in the above example 50%.
Withdrawal Scenario:
Student drops all courses but does not formally withdrawal – Administrative processing.

Last course drop date in system
Processing date of withdrawal
What we are doing and why

- We are effectively withdrawing the student because they have no active courses.
- We do this to show on the transcript and to conform to fact.
- We do it very late in the term so that students can still sign up for courses that start late in the term. If you do it early you may need to remove the withdrawal so they can enroll for these type of courses.
- Ideally they would notify us of the withdrawal through the withdrawal form, but that doesn’t always happen.
Withdrawal Scenario:
Prior term withdrawal, graded courses with and without dropped courses.

You cannot withdrawal from graded courses.
The courses grade must be removed as shown below.

Check Override Grading Basis

Change Grading Basis to Withdrawal

Place grade back into Grade In\Official
In the withdrawal panel you must use an Override Withdrawal Schedule because the courses drop date will be the last date of attendance because in the enrollment panel it will show as enrolled.

Course has no drop date in enrollment panel.
<table>
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<tr>
<th>Academic Career:</th>
<th>Undergraduate</th>
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**Academic Institution:** UW-Madison

**Term:** Fall 1999-2000

**Academic Level - Term Start:** 4

**Pro-Rata Eligible:** Post Term Withdrawal

**Withdrawal Cancel:** Withdrew

**Withdrawal Cancel Reason:** Personal

**Withdrawal Cancel Date:** 09/28/2000

**Last Date of Attendance:** 11/25/2000

**Override Withdrawal Schedule:** NDRW 509

**Drop date of these formally graded courses**

**Adjustment follows this withdrawal calendar**
What we are doing and why

- Courses graded must be removed or the withdrawal process will not post.
- We retain the grade in the system for records purposes.
- We use a custom transcript and it posts the withdrawal grade of W as well as a withdrawal header for the withdrawn term.
- You must use an override adjustment calendar in this process.
- Any course that was dropped outside the withdrawal process will need to be looked at for the adjustment it gave. If it needs adjusting to give a 50% adjustment then change the drop date to the last date of attendance. This makes it part of the withdrawal process.
Withdrawal Scenario:
Effective date of requested withdrawal is in future term.

• We do not withdrawal students for future terms. If classes have not started and courses are all dropped, it is as if they are not attending.
• The enrollment panel does not retain a course until the first day of classes in the term.
Withdrawal Scenario:

Students who die during the term.

- We process a standard withdrawal with an override adjustment calendar of 100%.
- Courses dropped prior to the withdrawal are checked for drop dates and adjusted to match the withdrawn courses to get a 100% adjustment when needed.
Withdrawal Scenario:
Sessions starting on different weeks and having different lengths that if dropped on the same date require different refunding percentages.

• This is why you check the session start dates and the effective date of the withdrawal.
• If the effective date would entitle the student to 50% adjustment on several courses and 100% on one, because they start on different weeks, you will need to change the drop date on unique one to accomplish this.
• Use the withdrawal process to accomplish the desired end on the vast majority and use the drop date changes on the minority one.
Conclusion of Presentation
This is how we do withdrawals and why. This isn’t the only way to accomplish these end results, but it is how we have done it.

Presenter(s)’s
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