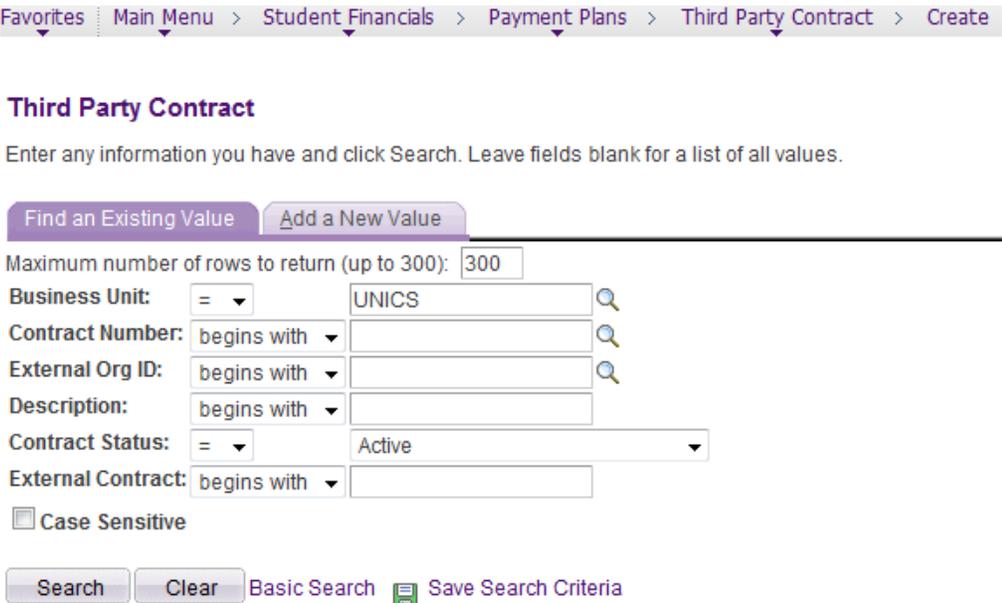
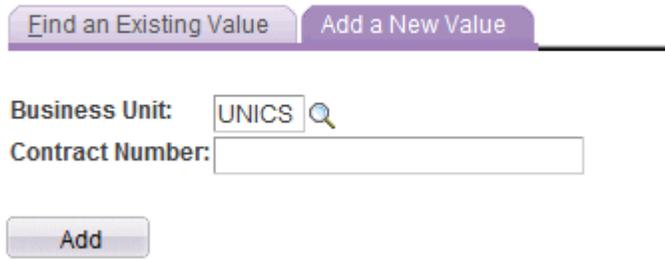
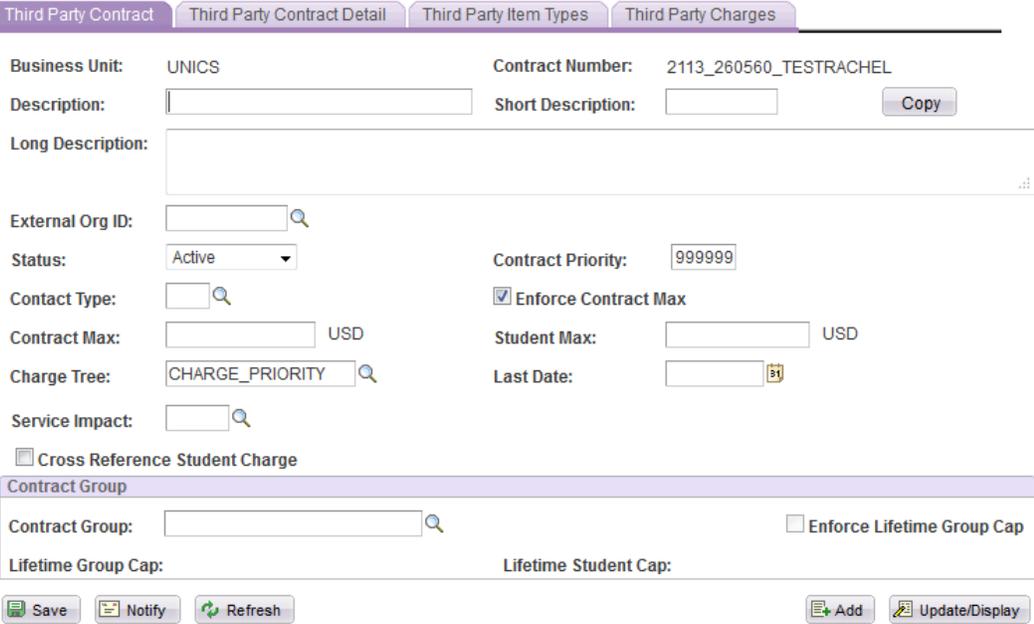


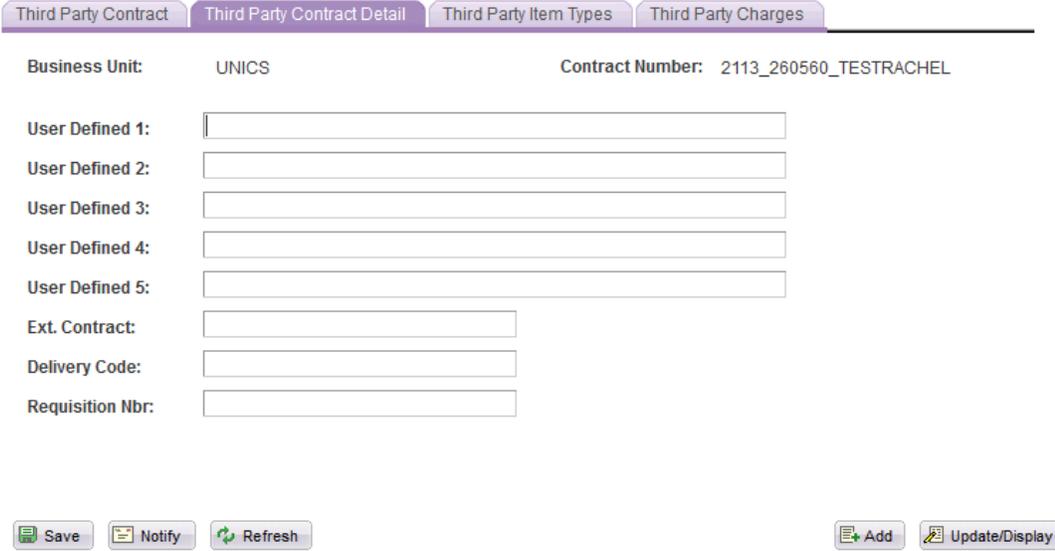
## Creating and Linking a Third-Party Contract to an Account

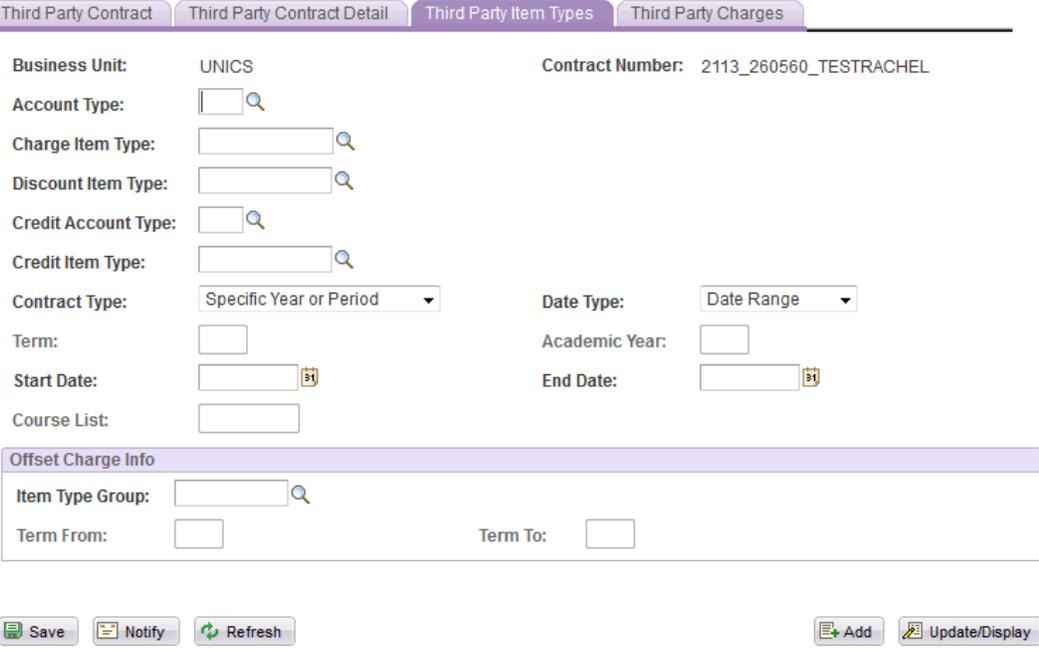
**Purpose:** Third-party contracts are credit agreements between UNI and a third-party sponsor—typically corporations or government agencies.

To create a third-party contract, use the **Calculate Third Party Contract** component to define its basic parameters. To link the payment plan to a student, use the **Third Party Contract** page. The following instructions describe how to create a new third-party contract and link it to an individual student. **NOTE:** For SAUDI, each student must have a separate contract.

Step	Action
1.	<p>Navigate to the <b>Third Party Contract</b> page: <b>Main Menu &gt; Student Financials &gt; Payment Plans &gt; Third Party Contract &gt; Create</b></p> 
2.	<p>Click the <b>Add a New Value</b> tab.</p> <p><i>Note:</i> If a message displays about “Auto Numbering”, click <b>OK</b> to skip the message. Auto Numbering will not be used.</p> <p><b>Third Party Contract</b></p> 

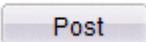
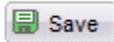
Step	Action
3.	<p>Enter the contract number for the contract you are about to create. The format for the contract number is: [TERM]_[U-ID]_[SHORT NAME]</p> <p><b>Example: 2112_#####_SAUDI (no spaces)</b></p>
4.	<p>Click the <b>Add</b> button.</p> <p><b>Result:</b> The <i>Third Party Contract</i> tab displays.</p> 

Step	Action
5.	<p>Complete the following:</p> <ul style="list-style-type: none"> <li>• <b>Description</b> – Enter a description (For SAUDI put the Mission ID here. Format = {Short Desc}_{Mission ID}, Example: SACM_#####</li> <li>• <b>Short Description</b> – Defaults to the first 10 characters of the <b>Description</b></li> <li>• <b>Long Description</b> – Enter details. E.g. Tution &amp; Mand Fees for Spring 2012</li> <li>• <b>External Org ID</b> – Select the ID for the third party sponsoring the contract. Search tip: Filter by SFTP in the search box.</li> <li>• <b>Status</b> – Defaults to <i>Active</i>. <b>DO NOT CHANGE</b></li> <li>• <b>Contract Priority</b> – Enter a value if a student is linked to more than one third-party contract. If there is only one contract, you may leave all 9’s</li> <li>• <b>Contact Type</b> – Select as appropriate (e.g. Primary Contact)</li> <li>• <b>Enforce Contract Max</b>– Defaults to checked. Leave checked.</li> <li>• <b>Contract Max</b> – Maximum dollar amount the sponsor provides for all sponsored students combined. Note: For SAUDI it is per student.</li> <li>• <b>Student Max</b> – Maximum amount that the sponsor provides for any one sponsored student.</li> <li>• <b>Charge Tree</b> – Defaults to CHARGE_PRIORITY</li> <li>• <b>Last Date</b> - Enter the <b>Last Date</b> that charges can be added or adjusted. Date should 12/31/2500.</li> <li>• <b>Service Impact</b> – Use the <b>Service Impact</b> field to specify the service impact that would prevent enrollment into the payment plan.</li> </ul>
6.	<p>Click the <i>Third Party Contract Detail</i> tab.</p> 

Step	Action
7.	<p>Complete the following:</p> <ul style="list-style-type: none"> <li>• <b>User Defined 1:</b> – Enter the term (e.g. Spring 2012)</li> <li>• <b>User Defined 2:</b> - Enter a description (e.g. Saudi Cultural Mission XXXXX)</li> </ul> <p><i>Note:</i> Use additional fields to enter any information you wish to display on the invoice</p>
8.	<p>Click the <i>Third Party Item Types</i> tab.</p>  <p>Complete the following:</p> <ul style="list-style-type: none"> <li>• <b>Account Type</b> – Select <b>TPC – Third Party</b></li> <li>• <b>Charge Item Type</b> - Select the item type for third-party contract charges that will appear on the corporate account and invoice.</li> <li>• <b>Discount Item Type</b> – Not used.</li> <li>• <b>Credit Account Type</b> - Enter the item type that the system uses for credits to the customer. For example, TUT – Tuition Fees.</li> <li>• <b>Credit Item Type</b> – Select as appropriate</li> <li>• <b>Contract Type</b> - You can select to apply the contract to a: Specific Course, Specific Course List, Specific Term, or Specific Year or Period. The parameters (<b>Date Type, Term, Academic Year, Start Date, End Date, Course List</b>) are dynamic, depending on which Contract Type is selected. <b>Term</b> is typically used.</li> </ul>

Step	Action
9.	<p>Click the <i>Third Party Charges</i> tab.</p>  <p>Complete the following:</p> <ul style="list-style-type: none"> <li>• <b>Tree Node</b> – Enter a <b>Tree Node</b> from the item type tree that includes all charge item types you want to cover with the third-party contract (e.g. CIEP Tuition)</li> <li>• <b>Max Amount</b> - maximum amount that you can apply to pay off the charges belonging to the corresponding tree node.</li> <li>• <b>Percentage</b> - Specify the percentage of the eligible charge the system transfers to the sponsor. This percentage amount is limited by the maximum amount.</li> <li>• <b>Charge Item Type</b> – This field always displays the <i>Charge Item Type</i> carried over from the second tab.</li> <li>• <b>Discount %</b> - Not used.</li> <li>• <b>Discount Item Type</b> – Displays the <i>Discount Item Type</i> carried over from the second tab.</li> <li>• <b>Include Tax checkbox</b> – Not used.</li> <li>• <b>Tax Item Type</b> – Not used.</li> </ul>
10.	<p>User the <b>Add Row</b> button to add additional tree nodes (for each item type)</p> 
11.	<p>Click the <b>Save</b> button.</p> 
12.	<p>Note: To create additional contracts for the same organization (e.g. SAUDI), use to <b>Copy</b> button to access the <b>Copy Contract</b> page where you can copy an existing third party contract as the basis of a new third party contract. You may copy all contract setup information except for term and date information.</p>

Step	Action															
13.	<p>Now that you have created a third-party contract, link it to a student's account. Make note of the <i>Contract Number</i>.</p> <p>Navigate to <b>Assign</b>: Select <b>Main Menu &gt; Student Financials &gt; Payment Plans &gt; Third Party Contract &gt; Assign</b></p> <p><a href="#">Favorites</a>   <a href="#">Main Menu</a> &gt; <a href="#">Student Financials</a> &gt; <a href="#">Payment Plans</a> &gt; <a href="#">Third Party Contract</a> &gt; <a href="#">Assign</a></p> <p><b>Third Party Contract</b></p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p><b>Find an Existing Value</b></p> <p>Maximum number of rows to return (up to 300): <input type="text" value="300"/></p> <p><b>Business Unit:</b> = ▾ <input type="text" value="UNICS"/> 🔍</p> <p><b>Contract Number:</b> begins with ▾ <input type="text"/> 🔍</p> <p><b>External Org ID:</b> begins with ▾ <input type="text"/> 🔍</p> <p><b>Description:</b> begins with ▾ <input type="text"/></p> <p><b>Contract Status:</b> = ▾ <input type="text" value="Active"/> ▾</p> <p><b>External Contract:</b> begins with ▾ <input type="text"/></p> <p><input type="checkbox"/> Case Sensitive</p> <p><input type="button" value="Search"/> <input type="button" value="Clear"/> <a href="#">Basic Search</a> <input type="button" value="Save Search Criteria"/></p>															
14.	Use the <b>Third Party Contract</b> page to link students to third-party contracts.															
15.	<p>Enter the <b>Contract Number</b>. Click the <b>Search</b> button.</p> <p><b>Assign Students to Third Party</b></p> <p><b>Business Unit:</b> UNICS <b>Contract Number:</b> 2113_260560_TESTRACHEL</p> <p><b>External Org ID:</b> 656916 <b>Status:</b> Active</p> <p><b>Contract Maximum:</b> 500,000.00 USD <b>Total Charges:</b> 0.00 USD</p> <p><b>Date Type:</b> Date Range</p> <p><b>Start Date:</b> 01/01/2012 <b>End Date:</b> 05/31/2012</p> <p>Find   View All   First   1 of 1   Last</p> <table border="1"> <thead> <tr> <th>*ID</th> <th>Course List</th> <th>Student Max</th> <th>Status</th> <th>Priority</th> </tr> </thead> <tbody> <tr> <td><input type="text" value="260560"/> 🔍</td> <td>Jones,Rachel M</td> <td><input type="text" value="10,000.00"/> USD</td> <td>Not Posted ▾</td> <td><input type="text" value="999999"/></td> </tr> <tr> <td><input type="text"/></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p><a href="#">Additional Details</a></p> <p><a href="#">Corp Accounts</a></p> <p><input type="button" value="Save"/> <input type="button" value="Return to Search"/> <input type="button" value="Notify"/> <input type="button" value="Refresh"/></p>	*ID	Course List	Student Max	Status	Priority	<input type="text" value="260560"/> 🔍	Jones,Rachel M	<input type="text" value="10,000.00"/> USD	Not Posted ▾	<input type="text" value="999999"/>	<input type="text"/>				
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16.	In the <b>ID</b> field, enter the student id for the student you wish to assign this third party contract. For CIEP - In the <b>Course List</b> field, select 3 or 6 Billing Units Courses.															
17.	After you assign an ID to the contract and tab off the field, the system makes the <b>Post</b> button active.															

Step	Action
18.	<p>Click the <b>Post</b> button to link the student to the third-party contract. </p> <p><i>Result:</i> The <b>Status</b> changes from <i>Not Posted</i> to <i>Active</i>.</p> 
19.	<p>Click the <b>Save</b> button. </p>

You may view the student’s third party contract by clicking the **Payment Plans** link on the **View Customer Account** page.

Favorites | Main Menu > Student Financials > View Customer Accounts

### Customer Accounts

Business Unit: UNICS

ID: [Academic Information](#)

Total: 50.00      Anticipated Aid: 0.00

Account Type	Account Number	Balance	Open Date	Status	
Tut Fees	TUT&FEE001- FALL 2011	0.00 USD	09/09/2011	Active	<a href="#">Account Details</a>   
Misc Chrgs	MISC001 - SUMMER 2011	50.00	07/16/2011	Active	<a href="#">Account Details</a>   
Misc Chrgs	MISC001 - SPRING 2011	0.00	07/16/2011	Active	<a href="#">Account Details</a>   
Misc Chrgs	MISC001 - FALL 2010	0.00	07/16/2011	Active	<a href="#">Account Details</a>   
Tut Fees	TUT&FEE001- FALL 2010	0.00	07/16/2011	Active	<a href="#">Account Details</a>   
Misc Chrgs	MISC001 - SUMMER 2010	0.00	07/16/2011	Active	<a href="#">Account Details</a>   
Tut Fees	TUT&FEE001- SUMMER 2010	0.00	07/16/2011	Active	<a href="#">Account Details</a>   

Go to: [Detail Trans](#) [Item Summary](#) [Items by Term](#) [Items by Date](#) [Due Charges](#) [Payment Plans](#)

**Result:**  
**Payment Plan**

Business Unit: UNICS

ID:

Contract Nbr	Contract Description	Contract Type	Plan Type	External Org ID	Contract Status
2112_419897_SAUDI	SACM_54914	Third Party		656916	Cancelled
2112_54914_SAUDI	SACM_54914	Third Party		656916	Active