LOS RIOS
COMMUNITY COLLEGE DISTRICT

**Campus Solutions
PeopleSoft
Access Request Form**

**American River College
Cosumnes River College
District Office
Folsom Lake College
Sacramento City College**

Student Financials
Definitions of Roles

Role Name	Description	PS Role Name

SF View I	For staff who require <u>inquiry only</u> access to the student financials pages listed below:
	➢ Student Financials Module
	  – Equation variables
	  – Customer accounts
	  – Item
	  – Item due
	  – Item line
	  – View Service Indicator Data
		LR_SA_SF_VW_1

SF View II	For staff who require <u>inquiry only</u> access to the student financials pages. This role grants all access of the SF View I and the following pages listed below:
	➢ Student Financials Module
	  – Parking Decal Information
	  – Run the tuition calculation
		LR_SA_SF_VW_2

SF Access I	For staff who <u>maintain</u> student financials. This role grants all access of the SF View II and the following page access:
	➢ Student Financials Module
	  – Review student by date
	  – Review student by ID
	  – Refund Student
	  – Update Parking Report/Labels
	  –
		LR_SA_SF_ACCESS_1

SF Access II	For <u>senior level</u> staff who <u>maintain</u> student financials. This role grants all access of the SF Access I and the following page access:
	➢ Student Financials Module
	  – Add and update apply payment
	  – Add and update group data entries
	  – Add and update external files
	  – Add and update group detail
	  – Add and update group post – suspended
	  – Add and update group summary
	  – Add and update post transactions
	  – Reverse Groups
	  – Review Suspended Transactions
	  – Correct Transactions
	  – Review purchases items
	  – Review e-payment transaction log
	  – Post (add) charges and payments student transaction
	  – Run account audit statement report
	  – Add and update daily posting
	  – Update reverse charges
	  – Update reverse payment
	  – Add and update charges and payments validate tables
	  – Update change item line
	  – Update cancel/reverse student refunds by date
		LR_SA_SF_ACCESS_2

Role Name	Description	PS Role Name
	− Update cancel/reverse student refunds by ID − View fee calculation messages − Run account term sync − Update override optional fees − Update LR Parking maintenance − Restore archived student financial data	
SF Supervisor Access	For <u>supervisory</u> staff who <u>maintain</u> student financials. This role grants all access of the SF Access II and the following page access: ➢ Student Financials Module − Run daily activity − Update correct transactions − Add and update BOG maintenance − Add and update BOG waiver processing	LR_SA_SF_SUPV_ACCESS
Third Party View	For staff who require <u>inquiry only</u> access to the Third Party Contract pages listed below: ➢ Student Financials Module − Corporate Accounts − Corporate Item − Corporate Item Due − Corporate Item Line ➢ Student Financials Module > Cashiering − Review Corporate Payments − Review Corporate Receipts ➢ Student Financials Module > Payment Plans > Third Party Contracts − Create − Assign ➢ Student Financials Module > Refunds − Review Corporate Payments by ID − View Corporate Payments by Date	LR_SA_SF_TPC_VIEW
Third Party Access	For staff who <u>maintain</u> Third Party Contracts. This role grants the following page access: ➢ Student Financials Module − Corporate Accounts − Corporate Item − Corporate Item Due − Corporate Item Line ➢ Student Financials Module > Charges & Payments − Create Group Corporate Entries − Correct Group Corporate Transactions − Reverse Corporate Payment − Reverse Corporate Charge − Post Corporation Transaction ➢ Student Financials Module > Cashiering − Post Corporate Payments − Review Corporate Payments − Review Corporate Receipts ➢ Student Financials Module > Payment Plans > Third Party Contracts − Create	LR_SA_SF_TPC_ACCESS

Role Name	Description	PS Role Name
	– Assign – Assign and Recalc – Review Results by Contract – Rollover Contracts – Contract Node Change Request – Process Node Change Request – Mass Contract Select ➢ Student Financials Module > Refunds – Corporate Refund – Corporate Refunds by ID – Corporate Refunds by Date ➢ Student Financials Module > Collections – Change Corporate Item Line	
SF Cashiering Access I	For temp cashiers who maintain student financials Cashiering. This role grants the following page access: ➢ Student Financials>Cashiering – Post Student Payments – Collect Departmental Receipts – Cash Checks – Review Student Payments – Review Departmental Receipts – Review check cashing – Post Receipt – Review Student Receipts ➢ Student Financials>Cashiering>Cash Management – Make Interim Deposits – Interim Deposit Detail ➢ Student Financials>Cashiering>Balance by Business Day – Review Receipts By Date – Review Receipt Tender Flow – Review Totals by Deposit ID – Review Tender By Cashier – Review Tender By Register – Receipts By Business Data – Receipts By Number Summary – Receipts by Deposit ID Summary	LR_SA_SF_CSH_ACCESS_1
SF Cashiering Access II	For cashiers who maintain student financial cashiering. This role grants all access of the SF Cashiering Access I and the following page access: ➢ Student Financials>Cashiering>Cash Management – Void Receipts - Cashier	LR_SA_SF_CSH_ACCESS_2
SF Cashiering Supervisor Access	For supervisory staff who maintain student financials Cashiering. This role grants all access of the SF Cashiering Access II, SF Cashiering Access I and the following page access: ➢ Setup SACR Cashiering – Cashiering Offices – Target Keys	LR_SA_SF_CSH_SUPV

Role Name	Description	PS Role Name

	− Tender Keys
	    − Valid Registers
	    − Valid Cashiers
	    − Receipt Print Messages
	    − Void Reasons
	
	➢ Student Financials>Cashiering>Cash Management
	    − Open Offices
	    − Close Offices
	    − Reopen Offices
	    − Replenish Cash
	    − Review Replenishment	

Attendance Accounting Access
 	
Access should only be given to DO Fiscal Services staff.
	For staff who <u>maintain</u> attendance accounting. This role grants the following page access:
	➢ SC Community College Data Module
	    − Update and correct 320 Retention Dates
	    − Run the Basic Skills Report
	    − View MIS College Daily Calendar
	➢ Records and Enrollment Module
	    − Run Repeats Intervention Report
	    − Run Unauthorized Repeat Report
	    − Run Withdrawal Report
	Note: Users who need this role should also be given CC View II and Basic Curriculum View.
		LR_SA_ATTND_ACCT_ACCESS

SF DO View	For District accounting staff who require <u>inquiry only</u> access to the student financials pages listed below:
	➢ Student Financials Module
	    − Maintain ePayment transactions
	    − Pending transaction
	    − Transaction log
	    − Review Group Posting information
	    − Review Group Post Transactions
	    − Run the UTP for DO report
	    − Specific UTP report
	    − Review GL History
	    − Review Accounting lines
	    − Run trial balance reports by account
	    − Run trial balance reports by student
	    − Run trial balance reports by student item
	    − Review Batch Refunds
	    − Student refunds by date
	    − Student refunds by ID
	➢ Setup SACR Module
	    − Student financials self-service payment messages
	    − Student financials institution set
	    − SF Merchants
	    − Charges priority list
	    − Charges and payments group type table
	    − Charges and payments item reasons
	    − Payment overall priority
	    − Class fees
	    − Class fees modal
	    − Course fees
	    − Course fees modal
	    − Credit card type
	    − Student financial external files layouts
	    − Student financial item type groups
	    − Student financials item types
		LR_SA_SF_DO_VW

Role Name	Description	PS Role Name
	– Student financials item types keywords – Student financials account types – Student financials refunds AP business unit – Student financials business unit – 1098-T TIN table – Tuition and fees adjustment calendars – Tuition and fees billing and due calendars – Tuition and fees criteria – Fee classes – Tuition and fees minimum/maximum fees – Term fees – Tuition calculation controls – Tuition group priority – Tuition groups – Tuition and fees waivers – Purchase Items	
Add on		

BOG Maintenance View Only	For staff who require <u>inquiry only</u> access to the BOG & AB19 waivers. This role grants the following page access:
	➢ Student Financials Module
	  – BOG Maintenance
	  – AB19 Promise Program Status
		LR_SA_SF_BOG_MNT_VW_ADD_ON

BOG Maintenance	For staff who <u>maintain</u> the BOG & AB19 waivers. This role grants the following page access:
	➢ Student Financials Module
	  – Add and update BOG Maintenance
	  – Update AB19 Promise Program Status
		LR_SA_SF_BOG_MNT_ADD_ON

1098T Edit	For staff who <u>maintain</u> the 1098-T. This role grants the following page access:
	➢ Student Financials Module
	  – Update edit 1098-T data (displays SSN unmasked)
	  – Review 1098-T data (displays SSN unmasked)
	  – Revoke 1098-T consent
		LR_SA_SF_1098T _ADD_ON

Parking Access Add On	For staff who <u>maintain</u> LR Parking and generate parking reports and labels. This role grants the following page access:
	➢ Student Financials Module
	  – Update parking decal information
	  – Run parking decal report/labels
		LR_SA_SF_PARKING_ADD_ON

Parking Update Add On	For staff who <u>maintain</u> LR Parking. This role grants the following page access: ➢ Student Financials Module – Update parking decal information *Note: Any user having this access will not be able to add or delete parking decal information.*	LR_SA_SF_PARKING_UPD_ADD_ON
Equation Variables Access	For staff who are authorized to update equation variable. This role grants the following page access: ➢ Student Financials Module – Update equation variable	LR_SA_SF_EQT_VAR_ADD_ON
Staff ID Verification	For staff who are authorized to reset staff passwords. ➢ PeopleTools – Verify employee identity (access to obtain staff name, last 4 of SSN, DOB, home address and phone numbers)	LR_HR_PT_VERIFY_ID

Role Name	Description	PS Role Name
	Note: Userid must be added to the Active Directory Staff PSMS Group to perform password reset. This will happen automatically nightly.	

Service Indicator Update	For staff who are <u>authorized</u> to place and release student-related services indicators. This role grants the following page access:
	➢ Campus Community Module
	   – Update Manage Service Indicators (Additional row level security required. Submit the Service Indicators Security Form).
	   – Audit Service Indicators
		LR_SA_CC_SRVC_IN_UPD_ADD_ON

COTOP Administration
 	
Access should only be given to DO General Accounting Department staff.
	For staff who <u>maintain</u> COTOP Processes in the DO General Accounting Department. This role grants the following page access:
	SC Community College Data Module
	  1. COTOP Process
	  2. COTOP Student Payment
	  3. Process COTOP Refund
		LR_SA_SF_COTOP_ADMIN_ADD_ON

Post Library Fines	For staff who <u>maintain</u> the posting of library fines. This role grants the following page access: ➢ Student Financials Module – Post Student Transaction	LR_SA_SF_LIB_FINE_ADD_ON