



University of the Philippines



SAIS

Student Academic Information System



SAIS User Manual

Student Financials

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1. DOCUMENT CONTROL

1.1 Change Record

Date	Author	Version	Change Reference
17 November 2014	Almira Cayetano Michael Argarin	1.0	No Previous Document
16 February 2015	Sarah Cortijos	1.1	Added Document Control Numbers Edited Format

1.2 Reviewers

eUP Core Technical Committee

Name	Project Role
Prof. Rowena Solamo	Team Lead eUP Quality Assurance Team



TERM FEES



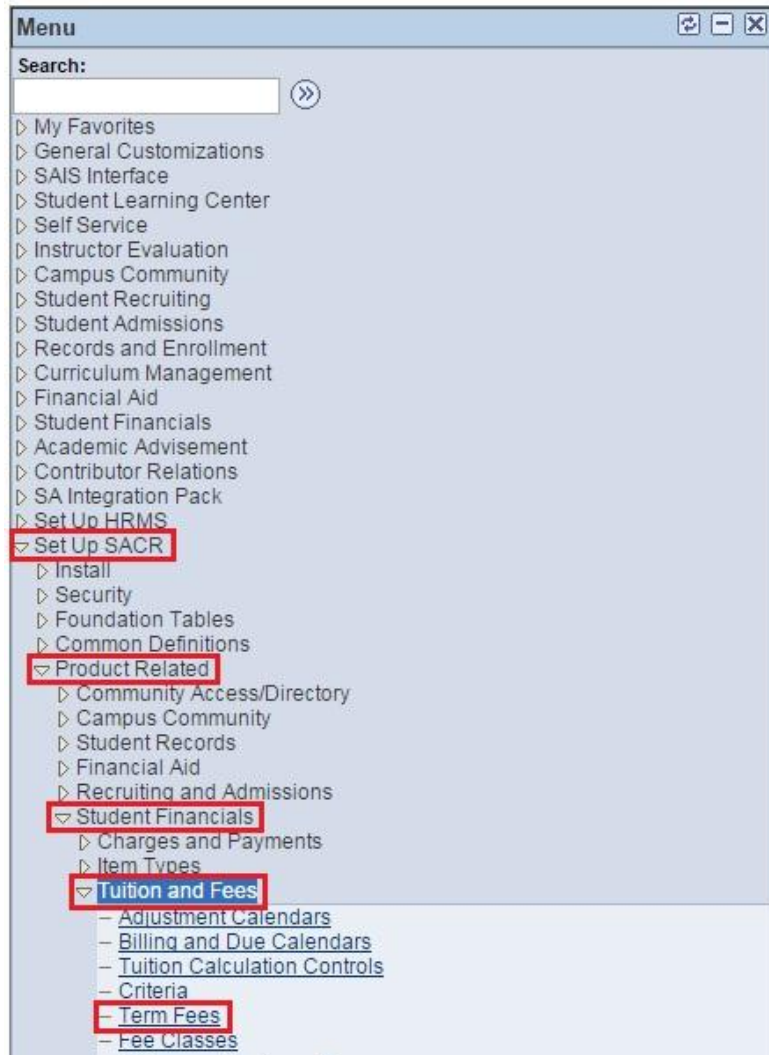


UNIVERSITY OF THE PHILIPPINES

<p>User ID: <input type="text"/></p> <p>Password: <input type="password"/></p> <p>Sign In</p>	<p>Welcome to the UP Student Academic Information System</p>
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STEP 1. Log into SAIS using the provided username and password. Click the **Sign In** button.

If you have problems or concerns, please read our FAQs at <http://e.up.edu.ph/faq-sais/>. You may contact the eUP Helpdesk via email at helpdesk@up.edu.ph or through phone at (02) 376-3100.



STEP 2. On the menu on the left side of the screen, click **Set Up SACR**.

Then, click **Product Related**.

Click **Student Financials**.

Click **Tuition and Fees**.

Click **Term Fees**.



STEP 3. Make sure to click the **Add a New Value** tab.

Fill out the **Set ID** and the **Term Fee Code** fields.

The **Set ID** is filled out according to the corresponding Constituent University.

Example: UPBAG for UP Baguio, UPCEB for UP Cebu, and so on.

The **Term Fee Code** is filled out according to the type of mandatory fee to be paid and the type of student. The abbreviation for each Code follows their description.

Example: ATH001 for Athletics Fee, CUL001 for Cultural Fee, and so on.

Click the **Add** button

The screenshot displays the 'Term Fee Codes' configuration page in the SAIS system. The left-hand menu is expanded to show 'Term Fees'. The main content area has several tabs, with 'Term Fee Codes' being the active one. The form fields are as follows:

- SetID:** UPBAG
- Fee Code:** ATH001
- *Status:** Active
- *Description:** Athletics Fee 2006 and below
- Long Description:** Athletics Fee 2006 and below (Undergraduate)
- *Charge By:** Term
- *Use:** Bill Units
- Use Anticipated Units if enrollment exists
- *Fee Class:** MAN | Mandatory Fees

At the bottom of the form, there are buttons for 'Save', 'Return to Search', 'Notify', 'Refresh', 'Add', and 'Update/Display'. A breadcrumb trail at the bottom reads: Term Fee Codes | Term Fees | Term Sub Fee Codes | Term Sub Fees | Term Fee Residency.

STEP 4. In the **Term Fee Codes** tab, fill out the required parameters.

Input the following:

Description

Long Description

Fee Class

Term Fee Codes **Term Fees** Term Sub Fee Codes Term Sub Fees Term Fee Residency

SetID: UPBAG Fee Code: ATH001 Athletics Fee 2006 and below Copy Term Fee

Term / Session Find | View All First 5 of 5 Last

*Term: 0000 Begin Session: [v] [+ -]

*Account Type: MIS Miscellaneous Charges

*Item Type: 000000000301 Athletics Fee

Anticipated Item Type: []

Fee Trigger: Use Criteria Use Equation
TRMF-ATH001 Term Athletics Fee 001

*Adjustment Code: ADJ01 Adjustment Calendar-Term Level

*Due Date Code: TERMDUE Term Due Date Calendar

Minimum/Maximum Fee Code: []

Minimum Amount: 0.00 Maximum Amount: 9,999,999.00 PHP

Anticipated Stop Date: []

Charge for Wait Listed Class Track Class pricing

Exclude Classes w/ HECS Status

Save Return to Search Notify Refresh Add Update/Display

STEP 5. Click the **Term Fees** tab. Fill out the required parameters. Input the **Term, Account Type, Item Type, Fee Trigger, Adjustment Code, and Due Date Code.**

Account types represent the Item Type classification. The user can utilize the preconfigured Account Types attached to his/her Institution. Item Type is the basic unit in Student Financials. It can act as a Waiver, Charge or a Payment depending on the transactions.

The user can also utilize the preconfigured Item Types attached to his/her Institution or he/she can add new Item Types in the Item Types page. Criteria are used to identify and classify the different types of students (i.e. Student's with Student # 2006 and below etc.).

The existing criteria can be used, or the user can add new Criteria to match the Schedule of Fees requirements.

New Window Personalize Page

Term Fee Codes Term Fees Term Sub Fee Codes **Term Sub Fees** Term Fee Residency

SetID: UPBAG Fee Code: ATH001 Athletics Fee 2006 and below

Term / Session Find | View All First 4 of 5 Last

Term: Summer Session: Audit Rate specified Audit calculated separately

Sub Fees Find | View All First 1 of 1 Last

Sub Fee Code: ATH001

Institution: UPBAG UPBAG Career: + -

Academic Group: Subject:

Campus: Location:

Mode: Academic Program:

Unit From: 0.00 To: 999.00 Fee Amt Equation:

Amount/Unit: 0.00 **Flat Amount: 37.50**

Amount/Unit (Audit): 0.00 Flat Amount (Audit): 0.00

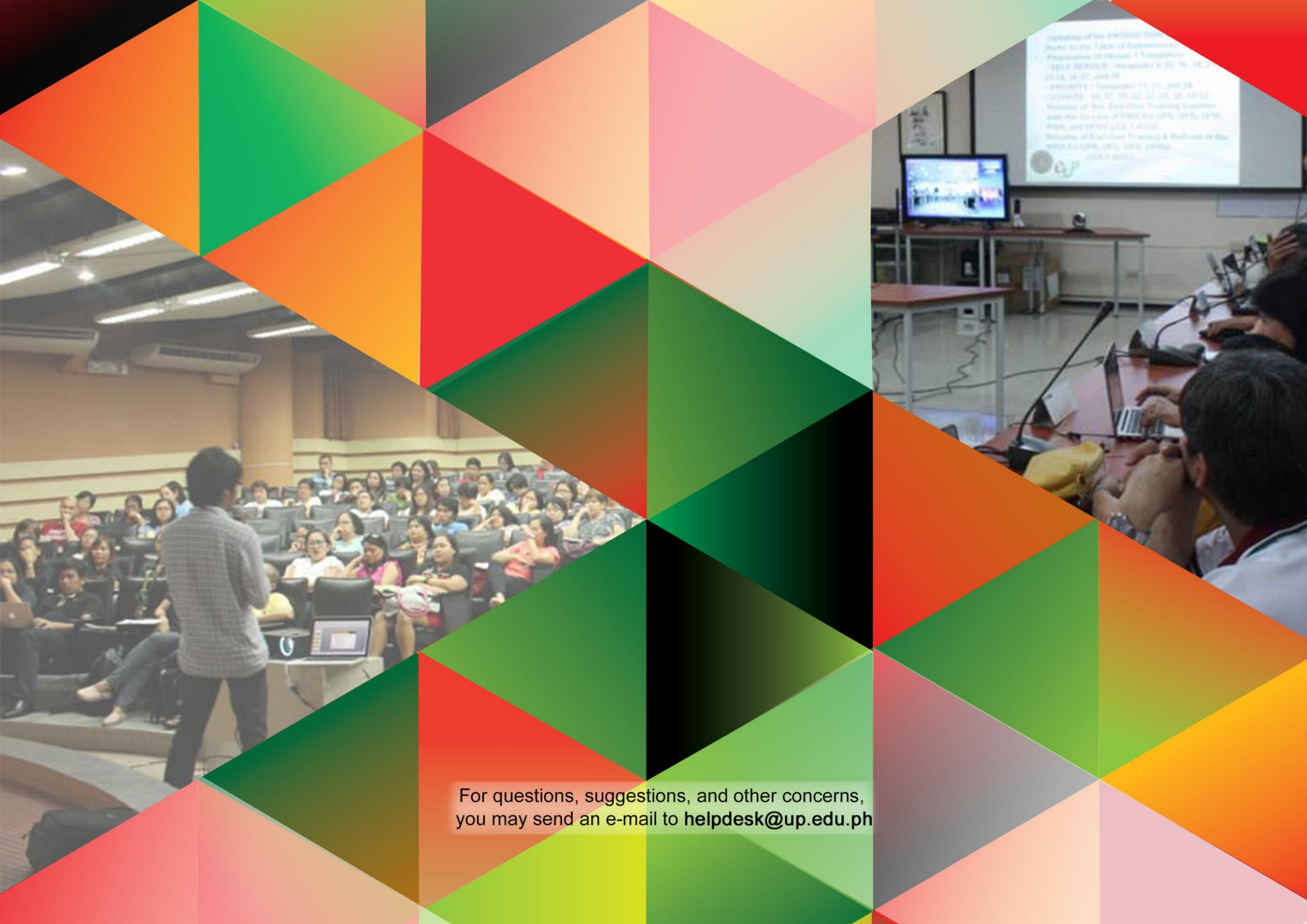
Surcharge Effective Unit: 0.00

Amount/Unit (Surcharge): 0.00 Flat Amount (Surcharge): 0.00 PHP

STEP 6. Click the **Term Sub Fees** tab. Fill out the required parameters.

Input the **Amount/Unit** and **Flat Amount**.

The values to be inputted are dependent on the Constituent University.



Supporting of the PRODIGE Training
Plan to the Table of Deliverables
Preparation of Manual 1 Template
HELP DESK - November 6, 10, 14, 17,
20, 24, 27 and 28
PRODIGE - November 11, 15, and 16
PRODIGE - 18, 19, 20, 22, 25, 26, 28, 29
Review of the Data Drive Training Together
with the Division of PRODIGE for UPE, UPE,
UPE, and UPE (LNU, LNU)
Review of the Data Drive Training & Roll-out of the
PRODIGE for UPE, UPE, UPE, UPE
2012-2013

For questions, suggestions, and other concerns,
you may send an e-mail to helpdesk@up.edu.ph