Create a New Student Billing Request

Logging In:
- The iSIS Home Page will appear.

STEP 1. Create the Billing Type ID - This step is optional. If the Billing ID Type you need is already set up, skip to STEP 2.
- Access the Billing Type page
  - Navigation: Set up SACR > Product Related > Student Financials > Billing > Billing Type
- Click the Add a New Value tab. Enter data as follows:
  - SetID – Enter, “TUFTS.”
  - Bill Type ID – Enter a 3-character alphanumeric code to identify the Billing Type you are creating.
- Click Add. The Billing Type page will appear. Enter data as follows:
  - Effective Date: Enter a date far in the past, for example, 01/01/1901.
  - Status: Defaults to “Active.”
  - Description: Enter a brief description for the Billing Type you are creating.
  - Short Description: This field defaults based on what you enter in the Description field.
- Click Save. Next, create an Invoice Number.

STEP 2. Create an Invoice Number - This step is optional. If the Invoice Number you need is already set up, skip to STEP 3.
- Access the Invoice ID Number page.
  - Navigation: Set up SACR > Product Related > Student Financials > Billing > Invoice ID Number
- Click the Add a New Value tab.
- In the Invoice ID Number field, use the search feature to select the appropriate Billing Type (STU for Student).
- Click Add. The Invoice ID Number page will appear.
- In the Description field, enter a description for the Invoice you are creating.
- Complete the remainder of the page in order to create the Invoice ID Number.
  - The Invoice ID consists of three fields that can contain either text or an auto-sequenced number. For each field, select the appropriate radio button to enter text or an auto-sequenced number.
    - **Note:** The length of the invoice number must be a total of 22 characters.
- After completing the page, click Save. Next, create the Standard Billing Request.

STEP 3. Create the Standard Billing Request - This step is optional. If the Standard Billing Request is already set up, skip to STEP 4.
- Access the Billing Standard Request page.
  - Navigation: Set up SACR > Product Related > Student Financials > Billing > Billing Standard Request
- Click the Add a New Value tab. Enter data as follows:
  - SetID - Enter, “TUFTS.”
  - Bill Request ID – Enter “Student.”
- Click Add. The Billing Request Page will appear. Enter data as follows:
  - *Eff Date - Enter a date far in the past, for example, 01/01/1901.
  - *Descr - Enter “Student.”
  - Short Desc - Enter “Student.”
  - Type of Request – For student billing requests, select the Student option. Note that for third party billing, you would select the Organization option.
- In the Miscellaneous Selection, in the *Zero Bill Handling field, select “Update Zero Bills” from the drop-down menu.
- Click the General Selection 2 tab at the top of the page. Enter data as follows:
  - Billing Type – Enter the Billing Type ID you created. You can also use the search feature to select it.
Billing, Cashiering, other Bursar Functions

- In the Invoice Option section, always select the Create Account Statements radio button. This selection ensures that the ending balance from the prior bill will be added to the current bill.
- By selecting the Create Account Statements radio button, the Prior Invoice Calc option drop-down will become active. Select the “Use Prior Invoice Amount” option.
- Invoice ID – Use the search feature to select the appropriate Invoice ID Number (not the Invoice Number).
  - Click the Academic Selections tab. Enter data as follows:
    - If the Use Records checkbox is selected, de-select it.
    - *Academic Institution – Enter “TUFTS.”
    - Career: Enter the abbreviation for the Student’s Career at Tufts. You can use the search feature to select it.
    - Academic Program/Academic Plan – Typically, these fields remain blank. However, in some instances a bill run will occur for a subset of a career. In these cases, you can limit the bill run by Academic Program or Academic Plan.
  - At the top of the page, click the arrow icon to show additional tabs.
  - Click the Enrollment Blocks tab.
    - Ensure the All Block checkbox is selected.
  - Click the Account Selections tab.
  - In the Account Type field, enter “STU” for Student Account Transactions.
  - Click Save. Next, define the Billing Request.

**STEP 4. Define the Billing Request**

*The Billing Request is the definition of a billing run. It directs to a Standard Billing Request and inherits the setup implicit in that request. The Billing Request is a method for adding more immediate parameters to a billing run.*

- Access the Create Billing Request page.
  - Navigation: Student Financials > Bill Customers > Student Bills > Create Billing Request
  - Click the Add a New Value tab.
  - In the Bill By Option field, use the search feature and select the appropriate option: Bill All Not Yet Billed, Bill Range, or Bill One ID.
  - Click Add. The Billing Request 1 page will appear. Enter data as follows:
    - Billing ID – Enter the Standard Billing Request Bill Request ID you set up in Step 3. You can use the search feature to select it.
  - Click the Billing Request 2 tab at the top of the page. Enter data as follows:
    - Bill Term – Select the appropriate option from the drop-down menu: All Terms, One Term, or Term Range
      - All Terms – If selected, you do not need to enter additional Bill Term information.
      - One Term – If selected, enter that Term Code in in the From Term field.
      - Term Range – If selected, enter the appropriate Term Codes in the From Term and To fields.
        - Note: For Term Range, the From term will always be 2135 (Summer 2013), as the oldest transactions in a student account could be converted transactions from term 2135. The To Term should be the current/recent Term.
    - Select the Address Not Required checkbox.
    - Select the Print Zero Bill checkbox.
  - As necessary, use the Tufts Parameters tab to specify different parameters for active and inactive students.
    - If you selected Term Range on the previous page, the Status Term field on the Tufts Parameters tab should contain the same term as the (Term) To field, the Aid Term From field, and the (Aid Term) To field.
      - From Term – The From Term should always be 2135.
      - To Term- Enter the same Term Code as was entered in the To Term field on the previous page.
      - (Aid Term) From- Enter the same Term Code as was entered in the To Term field on the previous page.
      - (Aid Term) To - Enter the same Term Code as was entered in the To Term field on the previous page.
  - Click Save.