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.

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<tbody>
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<td>1.</td>
<td>Navigate to the <strong>Third Party Contract</strong> page: Main Menu &gt; Student Financials &gt; Payment Plans &gt; Third Party Contract &gt; Create</td>
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**Third Party Contract**

Enter any information you have and click Search. Leave fields blank for a list of all values.

- **Find an Existing Value**
- **Add a New Value**

Maximum number of rows to return (up to 300): 300

- **Business Unit:** UNICS
- **Contract Number:**
- **External Org ID:**
- **Description:**
- **Contract Status:** Active
- **External Contract:**

**Case Sensitive**

- **Search**
- **Clear**
- **Basic Search**
- **Save Search Criteria**

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| 2.   | Click the **Add a New Value** tab.  
**Note:** If a message displays about “Auto Numbering”, click **OK** to skip the message.  
Auto Numbering will not be used. |

**Third Party Contract**

- **Find an Existing Value**
- **Add a New Value**

- **Business Unit:** UNICS
- **Contract Number:**

- **Add**
Step | Action
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3. | Enter the contract number for the contract you are about to create. The format for the contract number is:  [TERM]_[U-ID]_[SHORT NAME]

\textit{Example:} 2112_#####_SAUDI  (no spaces)

4. | Click the Add button.

\textit{Result:} The Third Party Contract tab displays.
### Step 5

Complete the following:

- **Description** – Enter a description (For SAUDI put the Mission ID here. Format = {Short Desc}_{Mission ID}, Example: SACM_####)
- **Short Description** – Defaults to the first 10 characters of the Description
- **Long Description** – Enter details. E.g. Tuition & Mand Fees for Spring 2012
- **External Org ID** – Select the ID for the third party sponsoring the contract. Search tip: Filter by SFTP in the search box.
- **Status** – Defaults to *Active*. **DO NOT CHANGE**
- **Contract Priority** – 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
- **Contact Type** – Select as appropriate (e.g. Primary Contact)
- **Enforce Contract Max** – Defaults to checked. Leave checked.
- **Contract Max** – Maximum dollar amount the sponsor provides for all sponsored students combined. Note: For SAUDI it is per student.
- **Student Max** – Maximum amount that the sponsor provides for any one sponsored student.
- **Charge Tree** – Defaults to CHARGE_PRIORITY
- **Last Date** - Enter the **Last Date** that charges can be added or adjusted. Date should be 12/31/2500.
- **Service Impact** – Use the **Service Impact** field to specify the service impact that would prevent enrollment into the payment plan.

### Step 6

Click the **Third Party Contract Detail** tab.

![Third Party Contract Detail](image_url)
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| 7.   | Complete the following:  
  - **User Defined 1:** – Enter the term (e.g. Spring 2012)  
  - **User Defined 2:** - Enter a description (e.g. Saudi Cultural Mission XXXXX)  
  
  **Note:** Use additional fields to enter any information you wish to display on the invoice |
| 8.   | Click the **Third Party Item Types** tab.  
  
  ![Third Party Item Types](image)  
  
  Complete the following:  
  - **Account Type** – Select TPC – Third Party  
  - **Charge Item Type** - Select the item type for third-party contract charges that will appear on the corporate account and invoice.  
  - **Discount Item Type** – Not used.  
  - **Credit Account Type** - Enter the item type that the system uses for credits to the customer. For example, TUT – Tuition Fees.  
  - **Credit Item Type** – Select as appropriate  
  - **Contract Type** - You can select to apply the contract to a: Specific Course, Specific Course List, Specific Term, or Specific Year or Period. The parameters (**Date Type, Term, Academic Year, Start Date, End Date, Course List**) are dynamic, depending on which Contract Type is selected. **Term** is typically used. |
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| 9.   | Click the **Third Party Charges** tab.  

![Screenshot of the Third Party Charges tab](image)  

Complete the following:  
- **Tree Node** – Enter a **Tree Node** from the item type tree that includes all charge item types you want to cover with the third-party contract (e.g. CIEP Tuition)  
- **Max Amount** - maximum amount that you can apply to pay off the charges belonging to the corresponding tree node.  
- **Percentage** - Specify the percentage of the eligible charge the system transfers to the sponsor. This percentage amount is limited by the maximum amount.  
- **Charge Item Type** – This field always displays the **Charge Item Type** carried over from the second tab.  
- **Discount %** - Not used.  
- **Discount Item Type** – Displays the **Discount Item Type** carried over from the second tab.  
- **Include Tax checkbox** – Not used.  
- **Tax Item Type** – Not used.  

10. User the **Add Row** button to add additional tree nodes (for each item type)  

11. Click the **Save** button.  

12. **Note**: To create additional contracts for the same organization (e.g. SAUDI), use the **Copy** button to access the **Copy Contract** 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.
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| 13. | Now that you have created a third-party contract, link it to a student's account. Make note of the *Contract Number*.  
   Navigate to **Assign**: Select **Main Menu > Student Financials > Payment Plans > Third Party Contract > Assign** |
| 14. | Use the **Third Party Contract** page to link students to third-party contracts. |
| 15. | Enter the **Contract Number**. Click the **Search** button. |
| 16. | In the **ID** field, enter the student id for the student you wish to assign this third party contract. For CIEP - In the **Course List** 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 **Post** button active. |
18. Click the **Post** button to link the student to the third-party contract.

*Result:* The **Status** changes from *Not Posted* to *Active*.

19. Click the **Save** button.

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

*Result:*

**Payment Plan**