What is a Special Request? A Special Request defines additional items that can be purchased by a student or group, either at the time of an enrollment transaction or independently. They can be associated for sale with a course section on the Section Fees page or with a program offering on the Offering Fees page. Special requests can also be automatically added to a transaction basket during a section enrollment using a Tuition Profile.

Special Requests are available in the Public View for group payment if your school is configured to allow it and the 'invoice my employer' payment option is available in the public checkout. Standalone special requests are not available for checkout through the Family Portal checkout.

Note: We do not recommend using Special Requests with the Corporate Admin Portal or the Corporate Learner Portal (part of the Corporate Engagement Manager) as they have not been fully tested and are not yet supported.

Special Requests Allocation to a Program Office and Costing Unit

You can allocate Special Requests transactions to a Program Office and Costing Unit for reporting purposes. Special Requests may be sold as:

- A section fee attached during enrollment in a course section (section level special request)
- A standalone purchase (basket level special request)
- An offering fee attached during enrollment in a program offering (offering level special request)

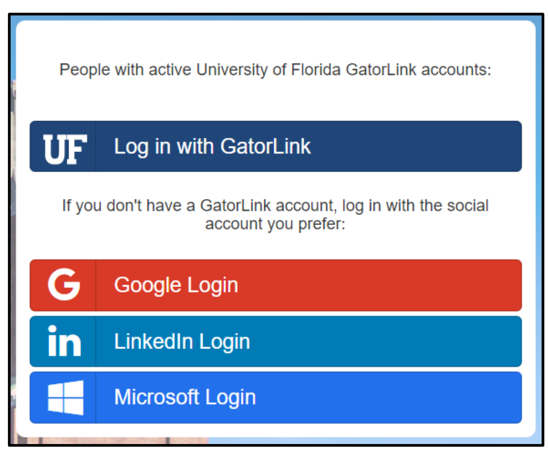
For Special Requests added to section fees or offering fees, the Program Office and Costing Unit of that section or offering respectively will override the Program Office and Costing Unit of the Special Request that you assign here.

Example One - Special Request purchase independent of an enrollment: You allow students to order a 'Transcript' Special Request from the Public View. The Special Request is purchased independently from any enrollment. The revenue for the 'Transcript' purchase must be allocated to a Costing Unit from within the Registration Program Office, which you assign here.

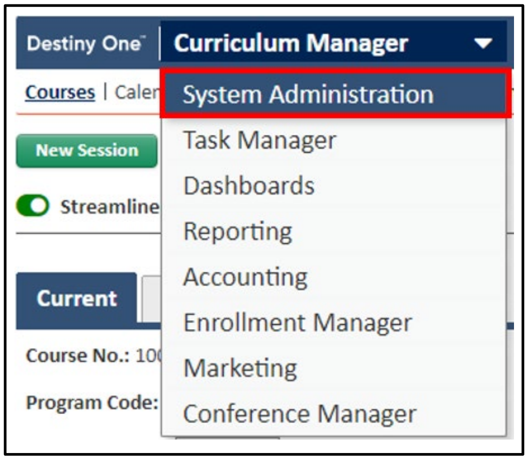
Example Two - Special Request purchase during enrollment, and for independent purchases: You offer a 'T-Shirt' Special Request. If a student purchases a T-Shirt as a mandatory requirement of enrollment in the section, the revenue must be allocated to the academic Costing Unit to which the course belongs. If a student purchases the T-Shirt independently from the section, the T-shirt revenue must be allocated to an administrative costing unit that facilitates the sale of the T-shirt, which you assign here.

Furthermore, you must complete the Program Office and Costing Unit fields for that Special Request so that you can run the Payment Allocation Costing Unit Reports - Detail or Summary.

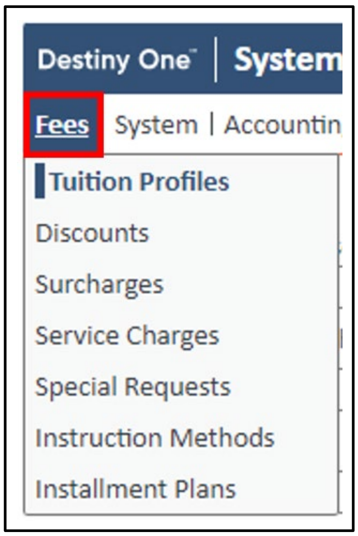
1. Log into Destiny One: uflsv.destinyone.moderncampus.net



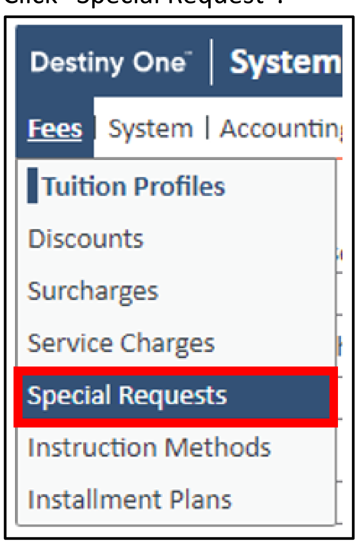
2. At the top left of your screen, use the dropdown menu to switch to the “System Administration”.



3. Hover over the “Fees” tab at the top.



4. Click “Special Request”.



5. Enter the following required information:
    a. Description: A description of the special request. This field will also be displayed in Checkout during the transaction and receipts. The field also appears in various places within the Staff View.
    b. Published Code: A code used as an item label in the Enrollment Manager and Public View checkout processes.
    c. Program Office: You can select the Program Office, so that you can run financial reports in Destiny One on Special Request transactions per Program Office - Costing Unit for standalone Special Request purchases. However, for Special Requests added to section fees, the Program Office and Costing Unit of the section will override the Program Office and Costing Unit of the Special Request.
    Note: Destiny One assigns the following option, by default, to existing Special Requests: Special Request - PO00SR for the Program Office.
    Costing Unit: You can select the Costing Unit, so that you can run financial reports in Destiny One on Special Request transactions per Program Office - Costing Unit for standalone Special Request purchases. However, for Special Requests added to section fees, the Program Office and Costing Unit of the section will override the Program Office and Costing Unit of the Special Request.
    Note: Destiny One assigns the following option, by default, to existing Special Requests: Special Request - CU00SR for the Costing Unit.
    d. Applicability: Indicates if the special request is applicable for Internal or Public.
        i. Public indicates that the special request is made available to registrations on the Public View and through the Enrollment Manager.
        ii. Internal indicates the special request is only available during registrations made through the Enrollment Manager.
    e. Fulfillment Details: The term 'Fulfillment Details' refers to the staff member's actions to complete the special request purchase: e.g., print and put the transcript in the mail. These Fulfillment Details generate Special Request Workflows.

    Note: Only special requests with the Fulfillment Details options of None, Generic or Membership can be associated to Tuition Profiles.

        i. None: No workflow task generates when this special request is purchased. Some schools use Conditional Fees in application questionnaires to charge additional fees based on the answers students provide; only special requests of fulfillment type “None” can be used for conditional fees.
        ii. Certificate: A workflow task generates when this special request is purchased, and the task prompts the staff user to associate the student with a certificate program and mark the task as completed.
        iii. Generic: A workflow task generates when this special request is purchased, and the task prompts the staff user to mark the task as completed.
        iv. Transcript: A workflow task is generated, and the task prompts the staff user to generate one or more transcripts. The transcripts are addressed to the student by default, but if alternate recipients and addresses were defined during checkout those details appear on the page and within the transcript.
        v. Membership: A workflow task generates when this special request is purchased, and the system automatically updates the student or group's membership fields in their profile. **Note:** If membership is selected, the following information becomes mandatory: Availability Date Range,

Effective Membership Date Range, Membership Type, Membership Status. Membership details are displayed onscreen only when the Fulfillment Details type "Membership" is selected from the select list.

1. Membership Type: Annual or Lifelong
2. Default Membership Status: Annual, Curtesy, Expired, Lifetime, No Membership, Pending, or Unknown
3. Default Number of Courses Remaining: Setting this field is optional. Use the select list to indicate the default number of courses that are included when a student purchases this membership. After purchasing this membership, this starting value will appear in the Number of Courses Remaining field under the Membership subform on the Student's full profile (Enrollment Manger > Profile > Full).
4. Membership effective Date Range: Use the calendar selectors to enter the Dates for which the Membership is effective. Optionally, select the checkbox to indicate NO expiry.

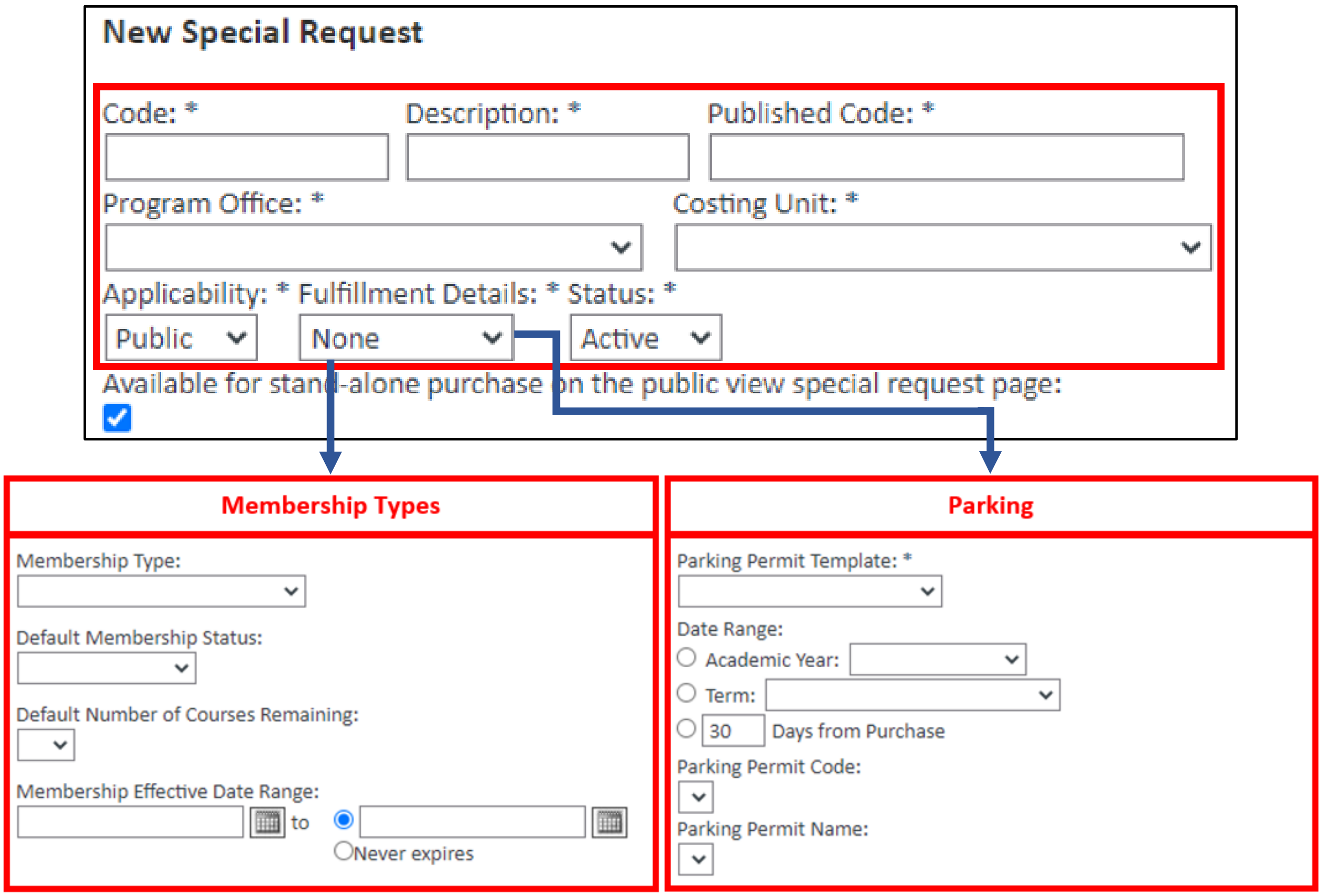
vi. Parking: A workflow task generates when this special request is purchased, and the task prompts the staff user to generate a parking pass for the student. When this option is selected, additional fields appear on the Special Request page, allowing you to enter details about the parking permit. Parking permit details are displayed only when the Fulfillment Details are set to Parking. Use the following fields to enter information about the parking permit:

1. Parking Permit Template: Use the drop-down to select the type of parking permit that is purchasable with this special request. The options are:
   a. Standard Parking Permit: With this option selected the Date Range options become available and the selection of a date range is mandatory. The date range details appear on the parking permit as does a Permit ID (a unique identifier).
   b. Temporary Parking Permit: With this option selected, no other parking specific fields are mandatory. The valid date range and Permit ID are left blank on the parking permit.
2. Date Range: These radio buttons are available only when Standard Parking Permit is selected as the Parking Permit Template. Select one of the following options:
   a. Academic Year: Use the drop-down list to select an academic year. The dates shown on the parking permit are the Begin and End Dates as defined on the Years page.
   b. Term: Use the drop-down list to select a term. The dates shown on the parking permit are the Begin and End Dates as defined on the Terms page.
3. X Days from Purchase: Enter a value for X and the permit is valid for that many days after the date of purchase. By default, this is set to 30 days.
4. Parking Permit Code: Available options are from the Parking Permit Code preference table. The value you select appears as the Permit Code in the core versions of the Standard and Temporary parking permits.
5. Parking Permit Name: Available options are from the Parking Permit Name preference table. The value you select appears near the top of the core versions of the Standard and Temporary parking permits.

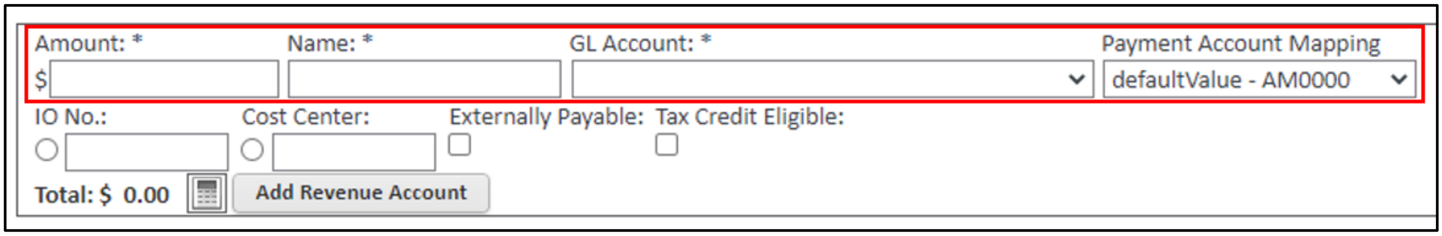
6. Parking Permit Conditions & Parking Permit Instructions (Located lower on webpage): Text you enter in the following two fields appears in the core versions of both the Standard and Temporary parking permits. If you leave either field blank, the corresponding area on the permit is hidden.

f. Status: Indicated whether the special request is active or inactive.

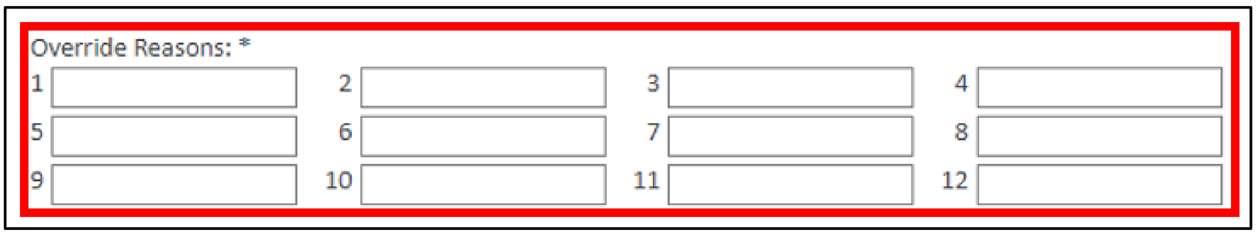
Note: Code is marked as required but will be automatically assigned once you select the “Save” button.



g. Payment Details:
   i. Amount: Enter the amount of the special request in the text box.
   ii. Name: Enter the name of the line item amount in the text box. This name must be unique. **Note:** The Name appears in Checkout during the transaction.
   iii. GL Account: Use the select list to select the applicable GL Account to which the payment will be applied. **Note:** If you select a GL Account that is Inactive; i.e., there is an (I) after the GL Account in the drop-down list, an internal error message appears. Review the list of GL Accounts in the drop-down list and select one that is Active.
   iv. Payment Account Mapping: Selects the applicable payment account mapping.



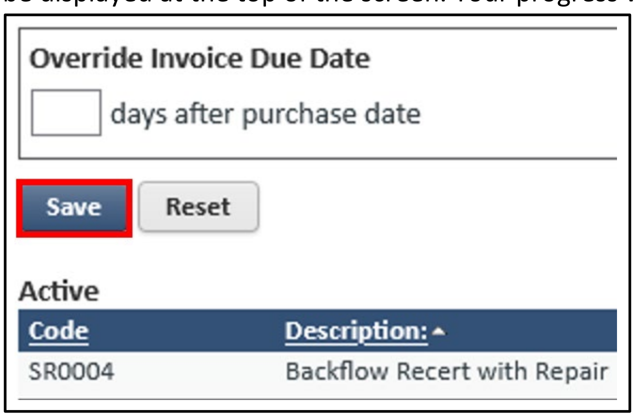
h. Override Reasons (located at the bottom of the screen): During the transaction process the user has the ability to either not charge or modify the amount of the special request but must select a reason indicating why they did not proceed with the default charge. The values entered in these text boxes will appear in a select list for the user to indicate the reason they are changing the amount of the special request.



6. Enter the following information as needed:
    a. Available for stand-alone purchase on the public view special request page: Select this option to make the special request available for stand-alone purchase on the Public View Special Request page. This option will be checked by default for any new special requests.
    Note: The Applicability must also be set to Public. If it is set to Internal the special request will not be visible on the PV.
    b. Availability Date Range: Selects the date in which the special request is available. If the special request does not expire, then select the "Never expires" radio button.
    c. Fee Category: Selects the applicable fee category. Available selections will be based on the Fee Category Preference Table.
    d. Special Request Type: Selects the type of special request and determines if the item is automatically added to the student's basket depending on the tuition profile's special request rules. Available selections will be based on the Special Request Type Preference Table.
    e. Default Refundable: Selecting this checkbox means that if the Special Request is included as part of an enrollment, it will be refunded by default if the section is subsequently dropped. If this checkbox is unchecked it will not be refunded by default in a drop transaction. This checkbox is selected by default.
    Note: This can be overridden during the drop transaction.
    f. Only allow payment by "Credit Card": Selecting this checkbox means that during checkout students bypass the Other Payment Options page and are taken directly to the Payment Details screen when this special request is in their basket.
    g. Public Description: A description of the special request that will display on the Public View. Maximum limit is 4000 characters.
    h. Receipt Notes: Notes that appear on the receipt regarding the purchase of the special request. Maximum limit is 1000 characters.

- i. <u>Payment Details:</u>
    - i. <u>IO No/Cost Center:</u>
        1. <u>Internal Order number (IO No):</u> Allows you to enter a number in the textbox.
        2. <u>Cost Center:</u> Allows you to enter a name into the textbox.
    - ii. <u>Externally Payable:</u> Allows special requests to be paid externally. This means that some or all of the income accrued by purchasing the special request is payable to a third party (for example, an insurance company). **<u>Note:</u>** Selection of this box will return the special request in the Special Request Search and Allocation and the Special Request Management Report.
    - iii. <u>Tax Credit Eligible:</u> Allows the special request to be eligible for a tax credit (refund).
- j. <u>Installment Plan:</u> Identifies the Installment Plan to apply to special requests. Available selections are based on the Installment Plan set up under System Administration > Fees > Installment Plans. If none are configured for the PO/CU of the special request, then the list will be blank. Select the Available for public view transactions option to offer a payment installment plan to students in the Public View. The installment plan will appear as an option when this special request is purchased with no other items in the basket. If the option is selected, then a date for the First Payment Due Date must also be configured. Select to use the dates defined in the installment plan (Use date derived from installment plan definition) or you can set up different dates as either a number of days after the transaction date or as a calendar date. Note that the installment plan selected must be set to Public applicability under the System Administration > Fees > Installment Plans page for it to be visible in the Public View.
- k. <u>Override Invoice Due Date:</u> When left blank, applied invoice payments will default to the system-defined due date. Otherwise, enter an override invoice due date that will apply to this special request. This date will populate the invoice due date field but can still be modified by staff while processing a transaction or while adjusting a transaction. This rule applies to standalone purchases of this special request. If this item is sold as part of a section or program offering, the override invoice due date is defined on the section or program offering.

7. Once all information is entered, click the navy "Save" button at the bottom of the page. If there is an error, it will be displayed at the top of the screen. Your progress will not be saved until all errors are corrected.



8. Once your special request is saved, it will be added to the "Active" or "Inactive" lists located at the bottom of the screen.