

Quick Guide for Submitting Records to Public Trust



Pre-Requisites

1. Review Security for Public Trust via the Security Administrator.
2. System/System Manager/System parameters:
 - a. Search on the word "trust" to bring up all parameters to check/alter.
 - b. Set Access_PT to Y to enable the Public Trust button from student screen.
 - c. Set PT_CLIENT_CODE .
 - d. Enter Public Trust default email in PT_EMAIL_RECEIPIENT.
 - e. Enter the email address that public trust will reply to in PT_REPLY_TO.
 - f. Enter the email name that public trust will reply to in PT_EMAIL_REPLYTONAME.
3. Finance Administration/Fee Types:
 - a. Add a Public Trust fee type against an existing fee OR add a new fee type with Public Trust category.
 - b. Assign the Fee with a public trust fee type to an OTE Enrolment fee or against the Miscellaneous Fees.
4. Add a study contract to a student:
 - a. Create an enrolment invoice and add public trust fee type from Enrolment fee or Miscellaneous Fee to the invoice items. (The fee pops up while creating a public trust record or the fees can be entered manually.)
 - b. Change the study contract to EA.

Create a Public Trust Record for a Student

1. Student/ SC/Public Trust button (enabled only when the parameter (Access_PT) is set and also when the public trust status is Cancelled(CA)).
2. Enter additional information.
3. SAVE to take the record to batch and update the public trust status to Awaiting Extraction(AE).

Export a Record

1. Admissions/Public Trust/Batch Export.
2. Select Main Venue or use the select all check box.
3. When data is returned, click on Export button which sends all the SC's to the Public Trust email .
4. A confirmation message will show after the records have been sent successfully. File can be downloaded public trust status is updated to SENT(SE).

Import a Result File

1. Public Trust will send a return email with the result file containing the public trust fee account number for all study contracts sent.

2. Go to Admissions/Public Trust/Batch Import.
3. Search
 - a. a grid provides a list of the Exported files.
 - b. Locate file that matches the result file and import.
 - c. File will be sent to the LRP queue.
 - d. When the LRP finishes Select Show Processed check box
 - e. Search.
4. Where the public trust fee account number has been successfully updated to the study contracts the Public Trust status updates to Confirmed by Public Trust(CO) else Cancelled(CA).

Record a Public Trust Manual Enrolment

1. Study contract/Public Trust tab.
 - a. Manual Send. Provide the fee account number and click Save. The status will update to Manually Sent(MS).

Change Status

1. To change Study contracts sent to the batch:
 - a. **from Batch:** search for the SC you do not wish to send and click on Exclude record to set the status to Cancelled(CA) and remove the record from the batch.
 - b. **from Client->Person->Study Contract-> Public Trust tab:** Select Star button and set the status to Cancelled(CA) to enable the public trust button and allow information to be edited and sent to the batch.