The **Education** Edge ™

Residence Life Guide

Contents

Residence Life Basics

Residence Life is an optional module in **Registrar's Office** and **Admissions Office** that enables you to enter housing and meal plan information for students. If you have **Student Billing**, you can also set up charges for student's residence life fees.

The Residence Life page in **Registrar's Office** is the central location for the entire residence life process. You can perform all tasks necessary for residence life, including creating residence halls and residences, creating meal plans, entering student residence life information, and printing housing reports. You can copy residence life information from one academic year and session to another. Before you enter residence life information, we recommend you plan how to use *Residence Life* and review "Set Up Residence Life" on page 3.

Access Residence Life

To access the Residence Life page, on the navigation bar in **Registrar's Office**, click **Residence Life**. The Residence Life page appears.
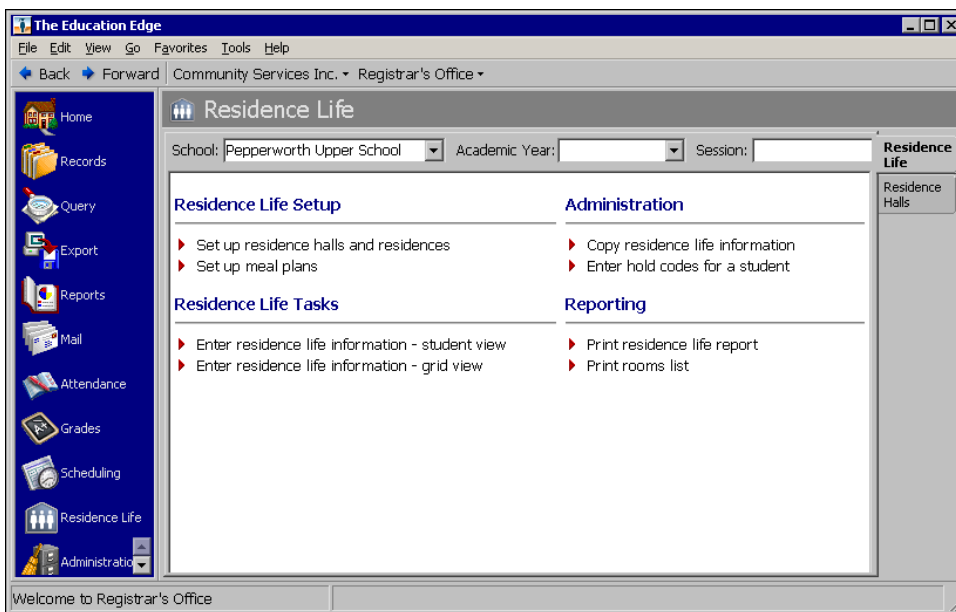
In the **School**, **Academic Year**, and **Session** fields at the top of the page, select the default information to enter residence life information. Your selections on the Residence Life page default into the screens you open from the Residence Life page.

In the **School** field, you can select <All Schools> to enter residence life information for multiple schools at once. To enter residence life information for multiple schools, you must use the same **Academic Year** table entry and the same **Session** table entry for each school. For example, if you have separate school records for separate campuses, you can enter residence life information for both of the schools if the academic year for each school is "2008-2009" and both years contain a "Regular" session.

If you have only one active school record or rights to only one school, the **School** field does not appear.

Residence Life Page

The Residence Life page organizes tasks into categories: *Residence Life Setup*, *Administration*, *Residence Life Tasks*, and *Reporting*.

Residence Life Setup

Residence Life Setup is discussed in more detail in "Set Up Residence Life" on page 3.

- To define residence halls and residences, click **Set up residence halls and residences**. For more information about how to define residence halls and residences, see "Set Up Residence Halls and Residences" on page 7.

- To define meal plans, click **Set up meal plans**. For more information about how to define meal plans, see "Set Up Meal Plans" on page 12.

Administration

Administration is discussed in more detail in "Set Up Residence Life" on page 3.

- To copy residence life information from one academic year and session to another, click **Copy residence life information**. For more information about how to copy residence life information, see "Copy Residence Life Information" on page 4.

- To enter hold codes for students, click **Enter hold codes for a student**. For more information about hold codes, see the *Configuration Guide for Registrar's Office*. For more information about how to enter a hold code, see "Enter Hold Codes for Students" on page 5.

Residence Life Tasks

Residence Life Tasks are discussed in detail in the "Residence Life Tasks" on page 15.

- To enter residence life information by student, click **Enter residence life information - student view**. For more information about how to enter residence life information by student, see "Enter Residence Life Information" on page 28.

- To enter residence life information by residence, click **Enter residence life information - grid view**. For more information about how to enter residence life information by residence, see "Enter Residence Life Information" on page 28.

Reporting

Reporting is discussed in detail in the Residence Life Tasks chapter.

- To print a housing report, click **Print residence life report**. For more information about how to print a residence life report, see "Reporting" on page 32.

- To print a rooms list, click **Print rooms list**. For more information about how to print a rooms list, see "Reporting" on page 32.

Set Up Residence Life

Before you use *Residence Life*, we recommend you review the following set up tasks.

❑ Read the *Residence Life Guide* and develop a plan for how your organization will use *Residence Life*.

❑ Assign security for *Residence Life*. For more information about how to assign security in *Administration*, see the Security chapter of *Administration Guide for The Education Edge*.

❑ Define Residence Life options. For more information about Residence Life options, see the *Program Basics Guide*.

❑ Set Residence Life business rules in *Configuration*. For more information about business rules, see *the Configuration Guide for Registrar's Office*.

❑ Set up your residence halls. To set up residence halls, see "Set Up Residence Halls and Residences" on page 7.

❑ Set up the residences in your residence halls. To set up residences, see "Set Up Residence Halls and Residences" on page 7.

❑ Set up the student meal plans. To set up meal plans, see "Set Up Meal Plans" on page 12.

❑ Before you can enter residence life information, students must have a student progression entry for that year. For more information about student progression entries, see the Students chapter of the *Records Guide for Registrar's Office*.

❑ If you have **Student Billing**, review "Student Billing Considerations" on page 13.

Copy Residence Life Information

You can copy residence life information from one academic year and session to another. This saves you time if the majority of your students are not changing residences. You can make necessary changes to student residence life records without having to enter new residence life information for them all. If you do not want to copy residence life information for all students, you can use the filters to define the group of students whose residence life information is not changing. The residence life information that copies includes housing, mailbox, and meal plan information.

▸ **Copy residence life information**

1. On the Residence Life page, click **Copy residence life information**. The Copy Residence Life Information screen appears.

Note: If you have only one active school or rights to only one school, the **School** field does not appear.

2. In the **Copy residence life information from** frame, select the school, academic year, and session to copy.

3. In the **Copy residence life information to** frame, select the school, academic year, and session to receive the copied information.

   The **Copy board type** checkbox is automatically marked and disabled.

4. To copy residence hall, residence, and phone information, mark **Copy housing information**.

5. To copy the mailbox number, mark **Copy mailbox**.

6. To copy the meal plan information, mark **Copy meal plan**.

7. In the Filters grid, you select criteria that determines which students to include when you copy residence life information. To copy residence life information for all students, keep the default values.

8. To access a selected filter, select a filter in the grid and click **Open**. You can also double-click a filter in the grid to open the screen.

   On the selected filter screen, define the filter criteria and click **OK**. You return to the Copy Residence Life Information screen. For more information about how to define filter criteria, see the Filtering Criteria section of the *Program Basics Guide*.

9. To review the criteria, students whose information copied successfully, and students with exceptions, click **Preprocessing**. A preprocessing report is generated.

10. When you finish viewing the preprocessing report, close the screen. You return to the Copy Residence Life Information screen.

11. To copy residence life information, click **Copy Now**.

Enter Hold Codes for Students

Note: If you also *Student Billing*, hold codes are shared between *Registrar's Office* and *Student Billing*.

On the Hold Codes page in *Configuration*, you define hold codes and restrictions for students. Hold codes prevent students from performing certain tasks until they complete a responsibility. When you put a student on hold, you encourage them to complete their responsibilities. For example, you can put students on hold by not allowing them to register for classes until they pay their tuition and fees. For more information about how to define hold codes, see the *Configuration Guide for Registrar's Office*.

After you define hold codes and restrictions in *Configuration* you enter hold codes for students on the Residence Life page. You enter hold codes one student at a time.

▸ **Enter a hold code for a student**

1. On the Residence Life page, click **Enter hold codes for a student**. The Open screen appears.

2. Enter the criteria you are using to search for the student and click **Find Now**.

3. Select the student for which to enter hold code information and click **Open**. The Hold Code Status Log appears.

4. To filter the hold code entries, in the **Date** field, select a time period. Only hold codes active during the time period selected appear.

Note: You define hold codes in *Configuration*. For more information, see the the *Configuration Guide for Registrar's Office*.

5. To enter a new hold code, in the **Hold Code** column, select the student's hold.

6. In the **Start Date** column, enter the start date for the hold.

7. In the **End Date** column, if needed, enter the end date for the hold. You can wait to enter an end date until the student has completed the responsibility.

8. In the **Reason** column, the reason you entered in *Configuration* defaults. If you want to use an alternate reason, delete the existing text and enter a new reason.

The **Date Changed** and **Changed By** columns, update automatically when an entry changes.

> **Note:** Only newly added hold codes update the student's billing status. If you change the hold code, you need to manually update the student's billing record if applicable.

9. Click **OK**. You return to the Residence Life page.

Conversion

In *Plug-Ins*, two utilities assist your conversion to the optional module, *Residence Life*. You can convert rooms to residences and you can convert student residence information. For more information, see "Plug-Ins" on page 1the Plug-Ins chapter of the *Administration Guide* for **The Education Edge**.

Set Up Residence Halls and Residences

In *Residence Life*, before you enter residence life information for students, you must define residence halls and residences. When you define residence halls, you need to determine how many residences are in the residence hall. You also define other requirements, such as the residences' type of room and bathroom, maximum capacity?, and gender. For example, is the bathroom private, shared, or floor shared. To save you time entering residence life information for students, we recommend you plan and define residence halls and residences first.

Also, when you define residence halls and residences you assign head residents and resident assistants. A head resident is usually a faculty member assigned to the residence hall and responsible for the resident assistants. The resident assistant is usually a faculty member or student assigned to a subset of residences in the residence hall for a specific year and session and responsible for the students living in those residences.

Access Residence Halls

From the Residence Life page, click **Set up residence halls and residences**. The Residence Halls page appears.

The residence halls you already defined appear in the Residence Halls page grid.

- To create a residence hall, click **New Residence Hall**. For more information about how to create new residence halls and residences, see "Set up a residence hall" on page 8.

- To open an existing residence hall, select the residence hall in the grid and click **Open**.

- To delete a residence hall, select the residence hall in the grid and click **Delete**. You cannot delete any residence halls that have active residences on student records. Instead of deleting a residence hall, we recommend you open the residence hall and mark **This residence hall is inactive**. When you mark a residence hall as inactive, all residences in use in the residence hall are automatically updated as inactive.

- To show residence halls marked as inactive, in the lower left corner, mark **Show inactive residence halls**.

Set Up Residence Halls

In *Residence Life*, you set up the residence halls where students reside. When you define residence halls, you need to determine how many residences are in the residence hall. You also define other requirements, such as the residences' type of room and bathroom, maximum capacity?, and gender. For example, is the bathroom private, shared, or floor shared.

▶ **Set up a residence hall**

1. On the Residence Halls page, click **New Residence Hall**. The New Residence Hall screen appears.

2. In the **Name** field, enter the name of the residence hall.

3. If the residence hall is inactive, mark **This residence hall is inactive**.

4. In the **Description** field, enter a description for the residence hall.

5. In the **Head resident** field, click the binoculars to select a head resident for the residence hall.

   On the Defaults tab, you define the default values for residences in the residence hall.

6. In the **ID prefix** field, enter a prefix for the residence IDs. For example, if your residence hall is "Holmes Hall," enter "HH" for the ID prefix. When you define the residence numbers, the IDs begin with "HH" and then the residence number.

Tip: If you have *Student Billing* and bill by room type, we recommend you make **Room type** a required field. For more information about required fields, see the *Configuration Guide for Registrar's Office*.

7. In the **Room type** field, enter the residences' type of room.

8. In the **Bathroom type** field, enter the type of bathrooms in the residence hall, such as private, shared, and floor shared.

9. In the **Maximum capacity** field, enter the maximum number of students per residence.

10. In the **Occupants will be** field, select the gender rule for the residence such as male only, female only, same gender, or any gender.

11. In the **Schools allowed** frame, if you have more than one school, mark the schools whose students are allowed to live in the residence hall.

12. In the **Grade levels allowed** frame, mark the grade levels allowed to live in the residence hall.

13. To exit without creating residences, click **Save and Close**.

    To save and continue, click **Save** and see "Set up residences" on page 10.

Set Up Residences

In *Residence Life*, when you define a residence hall, you also generate its residences. The residences generate based on the defaults you entered when you set up the residence hall. For more information about how to set up a residence hall and residence defaults, see "Set Up Residence Halls" on page 8.

To create residences based on floors, we recommend you generate residences one floor at a time. For example, generate "100-125", "200-225", and "300-325" separately instead of generating "100-325".

Also, after you generate the residences in the residence hall, you can set up resident assistants. The resident assistant is usually a faculty member or student assigned to a subset of residences in the residence hall for a specific year and session and responsible for the students living in those residences.

▶ **Set up residences**

1. On the Residence Hall screen, select the Residences tab.
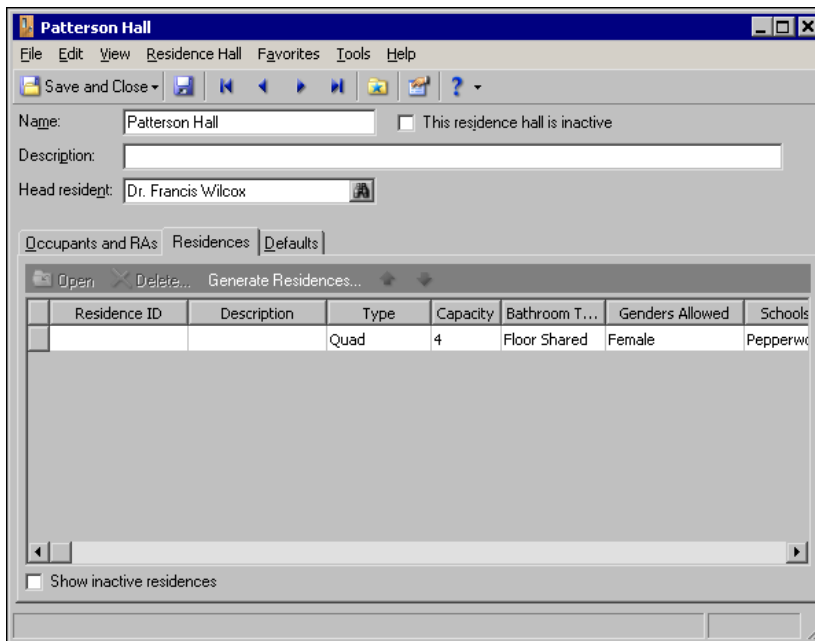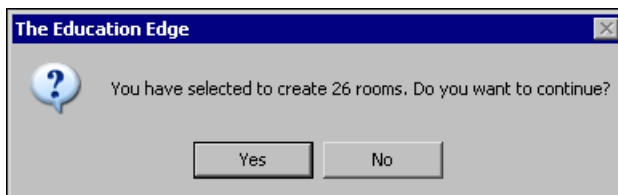

2. To generate the residences in the residence hall, click **Generate Residences**. The Generate Residences for <Residence Hall> screen appears.
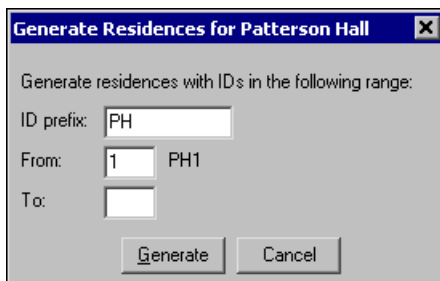
3. In the **ID prefix** field, the default ID prefix appears. To change the ID prefix, enter a new ID.

4. In the **From** field, enter the number of the first residence.

5. In the **To** field, enter the number of the last residence.

   If you number residences based on floors, enter the number of the last residence on the first floor. Instead of generating all residences at once, you generate the residences one floor at a time.

6. To create the residences in the residence hall, click **Generate**. A confirmation screen appears.

7. Click **Yes**. The residences generate, you return to the residence hall screen, and the new residences appear in the grid.

8. To create residences based on floors, continue to generate residences until all residences are created. For example, you generate residences separately for 100-125, 200-225, and then 300-325 for your residence hall with three floors.

9. To exit, click **Save and Close**.

   To save and continue, click **Save** and see "Set up resident assistants" on page 11.

▶ **Set up resident assistants**

1. On the Residence Hall screen, select the Occupants and RAs tab.

2. If you have multiple schools, in the **School** field, select the school to enter resident assistant information.

3. In the **Academic Year** field, select the year to enter resident assistant information.

4. In the **Session** field, select the session to enter resident assistant information. Resident assistants are assigned on a per session basis.

5. In the **Resident Assistant** column, enter a resident assistant or click the binoculars to search for the resident assistant.

6. To exit the residence hall record, click **Save and Close**.

Set Up Meal Plans

In *Residence Life*, you set up meal plans to assign to students. When you set up meal plans, you create meal plan table entries. If you have **Student Billing**, you can create invoices to bill students for their meal plan fees based on the meal plans you define here. For more information about *Residence Life* in **Student Billing**, see "Student Billing Considerations" on page 13.

▸ **Set up a meal plan**

Add as many meal plan table entries as you need. If you have ***Student Billing***, we recommend you create a separate table entry for each meal plan to ensure you correctly bill students.

1. On the Residence Life page, click **Set up meal plans**. The Meal Plan table appears.
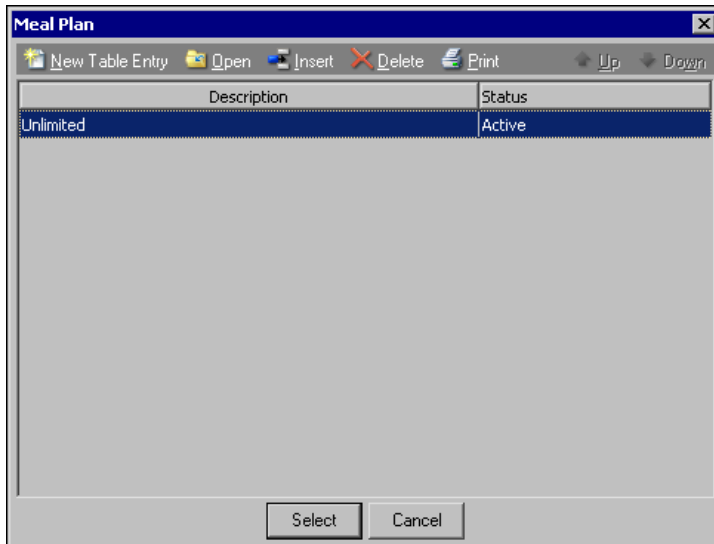
2. To add a new table entry, click **New Table Entry**. The New Table Entry screen appears.

3. In the **Description** field, enter a description for the new table entry. For example, enter "Unlimited" for a meal plan that allows student to eat unlimited meals.

4. If the meal plan is currently not in use, mark **Inactive**.

5. To save the new table entry and return to the meal plan table, click **OK**.

Student Billing Considerations

If you have ***Student Billing***, you can generate charges for housing and meal plans. To understand *Residence Life* in *Student Billing*, review the following tasks and recommendations.

• In *Configuration*, **Business Rules**, to enable the Registrar's Office and billing integration functionality, a process in which transactions are generated based on course and residence life fees, mark the **Generate transactions based on information from the Register's Office** checkbox. For more information about business rules in *Student Billing*, see the General Business Rules section of the *Configuration Guide for Student Billing*.

• Determine the account and project ID to associate with your residence life billing items. If needed, create an account and project in ***General Ledger*** with which to credit the residence fees. For more information about how to create accounts in ***General Ledger***, see the Accounts chapter of the *Records Guide for General Ledger*. For more information about how to create a new project in ***General Ledger***, see the Projects chapter of the *Records Guide for General Ledger*.

- We recommend you create separate flat rate billing items for residence life housing and meal plan fees. Depending on the needs of your organization, you can create one flat rate billing item for all on-campus housing or you can create multiple flat rate billing items for each type of housing, such as private room, double, and quad. For more information about how to create flat rate billing items in **Student Billing**, see the Products and Billing Items chapter of the *Records Guide for Student Billing*.

- In *Configuration*, set up your determination tables. Using determination tables, you define which billing item to use for course and residence life fees when generating an invoice line item. For more information about how to set up determination tables in **Student Billing**, see the Determination Tables Configuration section of the *Configuration Guide for Student Billing*.

- In *Configuration*, set up your reversal schedules for each session. Using reversal schedules, you define how residence life fee transactions are reversed with credits, adjustments, or deletions based on student residence life changes. You also define the percentages to credit back to students for different date ranges. For more information about how to set up reversal schedules in **Student Billing**, see the Student Billing Configuration chapter of the *Configuration Guide for Registrar's Office*.

- Before you can generate student residence life transactions in **Student Billing**, you must enter residence life information in **Registrar's Office**. For more information about how to enter residence life information, see "Enter Residence Life Information" on page 28.

- Before you generate transactions, we recommend you finalize residence life information for the session. When you are ready to generate transactions, you can use Generate Transactions Automatically to generate residence and meal plan fees. During this process, **Student Billing** uses information from the residence life records, determination table, and reversal schedule to determine which invoice items to generate for each student. For more information about how to generate transactions automatically, see the Administration chapter of the *Administration Guide* for **The Financial Edge**.

- After you generate transactions automatically, on student invoice records, the line item contains an internal comment field that details the board type, residence hall, residence type, and whether the residence is a private room. We recommend you refer to this field if you are concerned about a student's transaction. For more information about how to access line items on an invoice, see the Invoices chapter of the Records Guide for Student Billing.

- To assist your use of *Residence Life* in **Student Billing**, we recommend you use the residence life fields in *Query*. For more information about how to use *Query*, see the *Query Guide*.

- In **Registar's Office**, any time you change an existing residence life record (board type, residence, residence hall, meal plan, private room, or roommates) after the start of the session, you are prompted for an effective date. The date you enter determines how a student is billed in **Student Billing**. We recommend you discuss effective dates before you handle changes to residence life information.

- We recommend you plan how often you need to run the Generate Transactions Automatically utility. To ensure students are billed properly and records update in **Student Billing**, you should generate transactions periodically.

Residence Life Tasks

In *Residence Life*, you can enter housing requests for applicants and housing and meal plan information for students. You can enter residence life information directly on the applicant record and student record. Also, on the Residence Life page, you can enter student residence life information using a method that best fits your needs: by student or in grid view. Before you enter residence life information, we recommend you review the sample processes to determine the best plan for your organization. To review the sample processes, see "Residence Life Process" on page 16.

Residence Life Process

To help you use *Residence Life*, we have created sample processes for how to handle incoming students, returning students, and the fall to spring session transition. You can use these processes to gain a better understanding of how to use *Residence Life* and the tasks involved. However, actual processes and procedures vary from school to school. We recommend you review the sample processes and develop a plan for your organization before you use *Residence Life*.

Incoming Students

From application to enrollment, you can enter residence life information for incoming students. The following checklist is a sample process for how to use *Residence Life* for incoming students.

❑ When you enter application information, enter the applicant's preferred boarding type. For example, do they request to live on-campus or off-campus.

❑ On the applicant record, enter the housing request information, such as residence hall, residence, and roommate. You can enter housing request information either before or after enrollment.

❑ Enroll students using the Enroll Students wizard.

❑ Match incoming students with roommates. You match students to roommates outside of **The Education Edge**. This enables you to complete the process using a random, lottery, or roommate matching process.

❑ On the Residence Life page, select the **School**, **Academic Year**, and **Session** for which you need to enter residence life information.

❑ On the Residence Life page, enter residence life information either by student or in grid view. For more information about how to enter residence life information, see "Enter Residence Life Information" on page 28.

Returning Students

From one academic year to the next, you can enter residence life information for returning students. The following checklists are sample processes for how to use *Residence Life* for returning students either by lottery or from scratch.

Lottery

❑ Mark current students for reenrollment. For more information about how to mark students for reenrollment, see the Status Wizards chapter of the *Administration Guide*.

❑ Determine which students seek on-campus housing for the next academic year.

❑ Generate a lottery for the returning students.

❑ Schedule times for the lottery.

❑ On the Residence Life page, enter resident life information by student. For more information about how to enter residence life information by student, see "Enter Residence Life Information in Student View" on page 29.

Scratch

❑ Mark current students for reenrollment. For more information about how to mark students for reenrollment, see the Status Wizards chapter of the *Administration Guide*.

❑ Determine which students seek on-campus housing for the next academic year.

❑ Manually match students with residences and roommates.

❑ On the Residence Life page, enter residence life information in grid view. For more information about how to enter residence life information in grid view, see "Enter Residence Life Information in Grid View" on page 31.

Fall to Spring

From one session to the next, you can copy and edit residence life information for returning students. The following checklist is a sample process for how to use *Residence Life* for returning students.

❑ Determine which students are returning to their on-campus housing.

❑ If needed, create a query of students returning to the same residence. You can use a query when you copy residence life information.

❑ On the Residence Life page, complete the copy residence life information utility. When you copy residence life information, you can use filters to define the students whose information needs copying.

❑ For students whose residence life information changed; edit their information. On the Residence Life page, you can enter changes to residence life information. For more information about how to enter changes to student's residence life information, see "Enter Residence Life Information in Student View" on page 29.

View Residence Life Information

In *Records*, you can view housing requests on applicant records or residence life information on student records. On the Residence Life page, you can open and delete residence hall and residence records.

▶ **View residence life information on applicant record**

1. From the Records page in *Admissions Office*, click **Applicants**. The Applicants page appears.
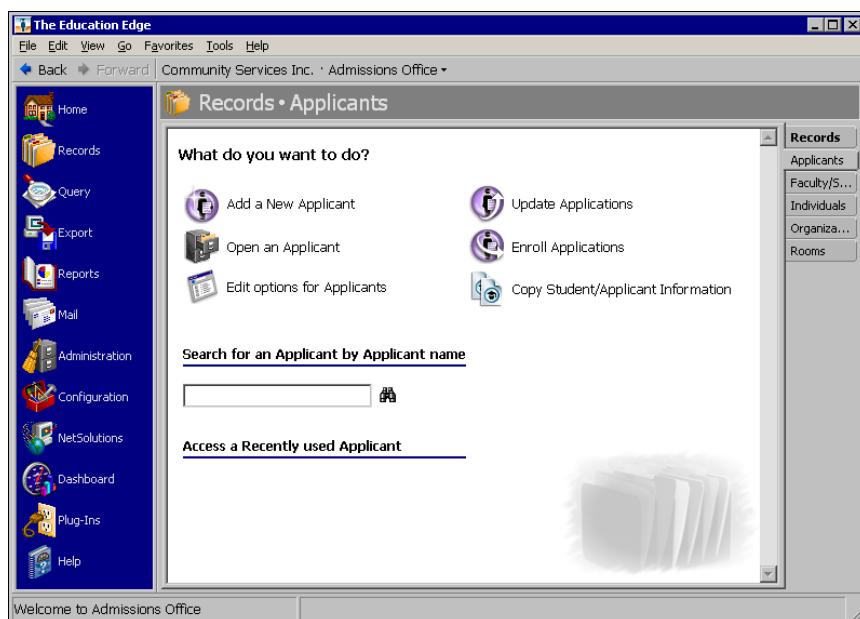
2. Click **Open an Applicant**. The open screen for applicants appears.

3. Enter the criteria you are using to search for the applicant and click **Find Now**.

4. Select the applicant whose residence life information you want to view and click **Open**. The applicant record appears.
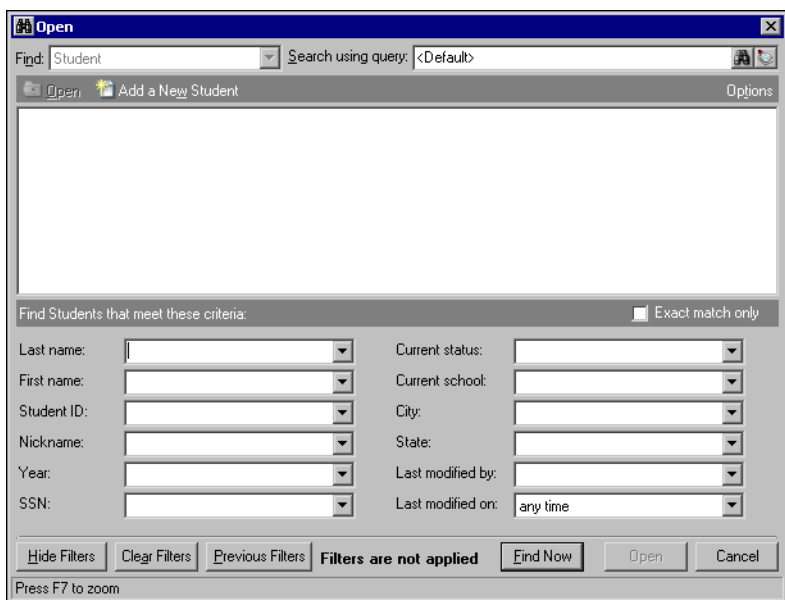
5. On the applicant record, select the Bio 2 tab.

6. In the **Housing Requests** frame, review the applicant's residence life information. Enter any housing request changes.

7. When finished viewing residence life information, click **Save and Close**.

▶ **View residence life information on student record**

1. From the Records page in *Registrar's Office*, click **Students**. The Students page appears.
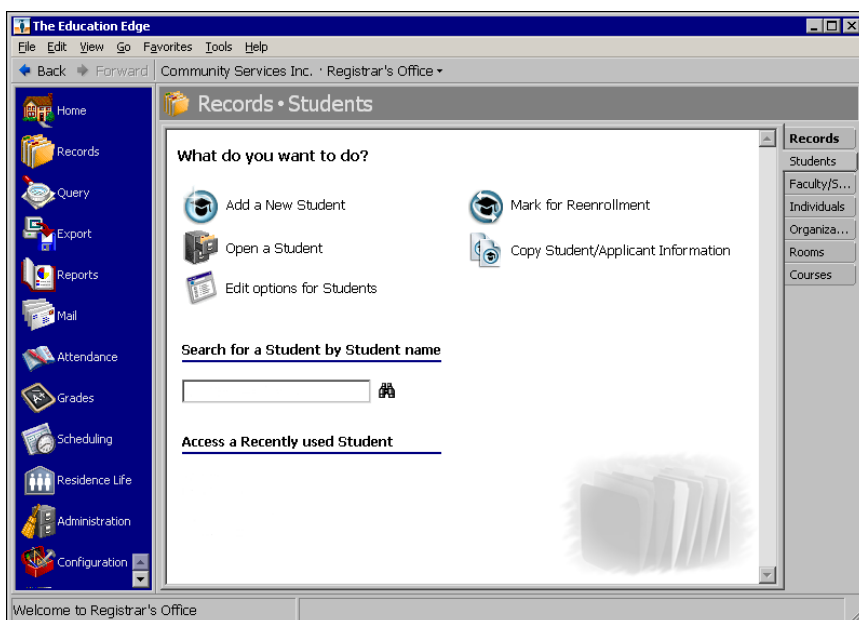
2. Click **Open a Student**. The open screen for students appears.

3. Enter the criteria you are using to search for the student and click **Find Now**.

4. Select the student whose residence life information you want to view and click **Open**. The student record appears.

5. On the student record, select the Bio 2 tab.

6. In the **Residence Life for** frame, review the student's residence life information. Enter any residence life changes.

7. When finished viewing residence life information, click **Save and Close**.

▶ **Open a Residence Hall**

Note: To view **Residence Life** on the navigation bar, you must have the optional module *Residence Life*.

1. In *Registrar's Office*, on the navigation bar, click **Residence Life**. The Residence Life page appears.

2. In the **Residence Life Setup** frame, click **Set up residence halls and residences**. The Residence Halls page appears.
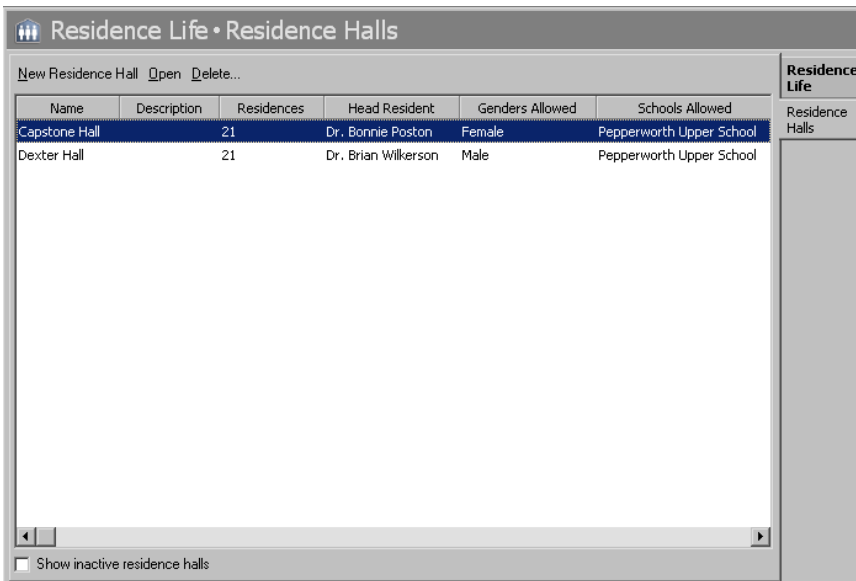
3. In the Residence Halls page grid, select a residence hall.

Note: For information about how to enter information on the residence hall record, see "Set up a residence hall" on page 8.

4. Click **Open**. The residence hall screen appears.
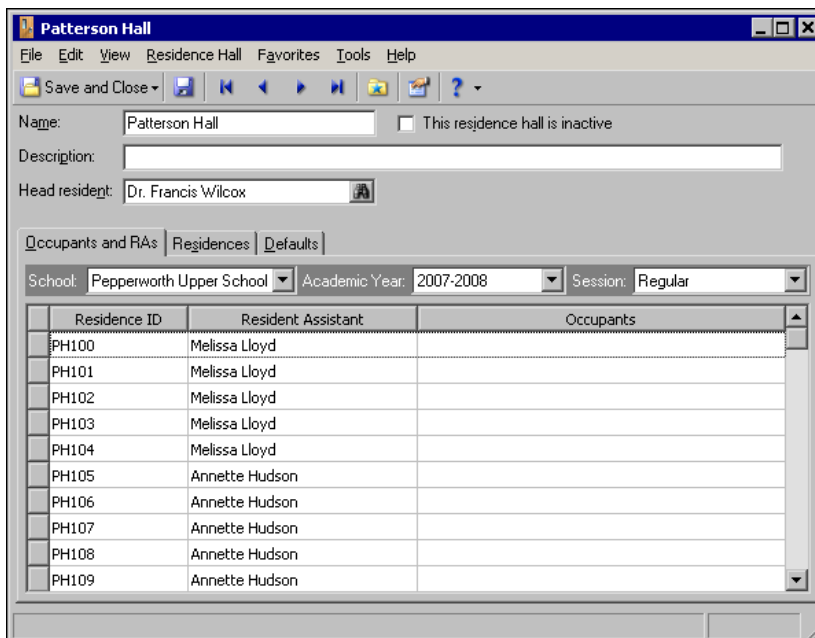
5. When finished with the residence hall record, click **Save and Close**.

▶ **Open a Residence**

Note: To view **Residence Life** on the navigation bar, you must have the optional module *Residence Life*.

1. In *Registrar's Office*, on the navigation bar, click **Residence Life**. The Residence Life page appears.

2. In the **Residence Life Setup** frame, click **Set up residence halls and residences**. The Residence Halls page appears.

3. In the Residence Halls page grid, select a residence hall.

Note: For information about how to enter information on the residence hall record, see "Set up a residence hall" on page 8.

4. Click **Open**. The residence hall screen appears.

5. Select the Residences tab. The **Residences** grid appears.

6. In the **Residences** grid, select a residence and click **Open**. The residence appears and the information you entered when you set up the residence hall and residences appears.

7. In the **Residence ID** field, the default residence ID appears. To edit the residence ID, enter a new unique ID. The ID cannot be the same as any existing residence or room ID.

8. In the **Description** field, enter a description of the residence.

9. In the **Room type** field, the default room type you entered on the Residence Hall Defaults tab appears. If necessary, you can change the room type.

10. In the **Phone** field, enter the phone number for the residence.

11. In the **Bathroom type** field, the default bathroom type you entered on the Residence Hall Defaults tab appears. If necessary, you can change the bathroom type.

12. If the residence is currently not available for use, mark **This residence in inactive**.

13. On the Occupants tab, the residence life information for occupants appears. The **School**, **Academic Year**, **Session**, and **Occupants** columns are read only.

    To add or edit a resident assistant, in the **Resident Assistant** column, enter the resident assistant or click the binoculars to search for the resident assistant.

14. To view residence restrictions, select the Restrictions tab.

15. In the **Maximum Capacity** field, **Occupants will be** field, and **Years allowed** box, the information you entered on the Residence Hall Defaults tab appears. To edit the restrictions, select your changes.

16. To view the residence attributes, select the Attributes tab.

17. On the Attributes tab, you can enter residence attributes. For more information about adding attributes, see the Rooms chapter of the *Records Guide for Registrar's Office*.

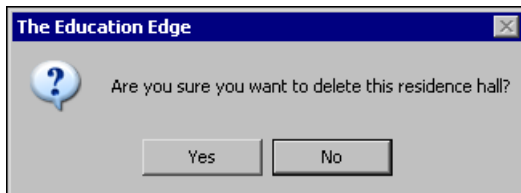18. When finished with the residence record, click **Save and Close**.

▶ **Delete a Residence Hall**

In *Residence Life*, you can delete a residence hall but only if no residences in the residence hall are in use. Before you delete a residence hall, we recommend you consider marking the residence hall inactive instead. When you mark a residence hall inactive, all the residences in the hall are also marked as inactive. This enables you to keep the residence hall and residences records but not make them available for use.

1. On the Residence Life page, in the **Residence Life Setup** frame, click **Set up residence halls and residences**. The Residence Halls page appears.
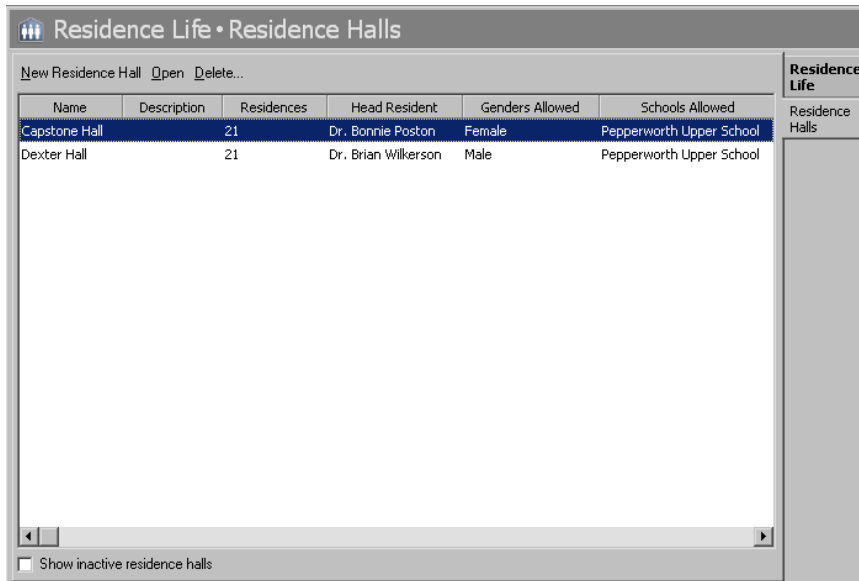
2. In the Residence Halls page grid, select a residence hall.

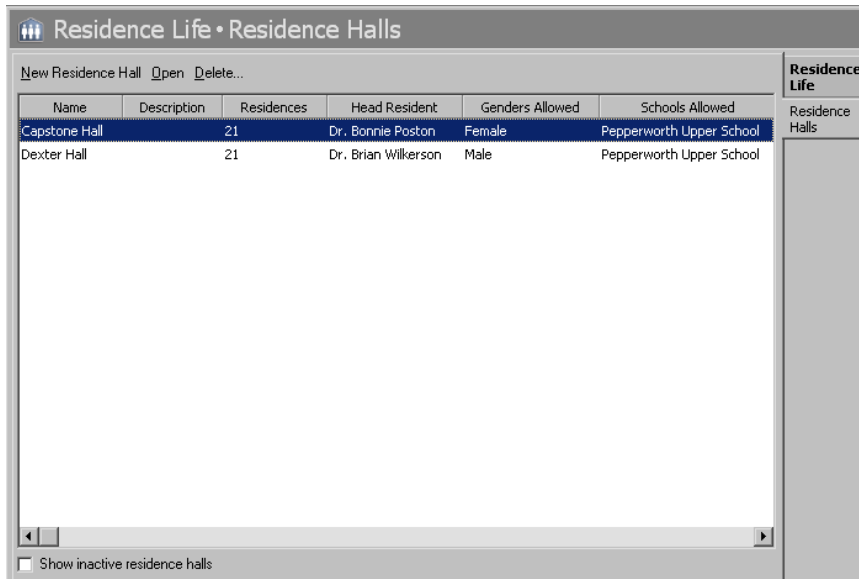3. Click **Delete**. A warning appears.

4. Click **Yes**. The residence hall and residences delete and you return to the Residence Halls page.

▸ **Delete a Residence**

In *Residence Life*, you can delete a residence but only if the residence is not in use. Before you delete a residence, we recommend you consider marking the residence inactive instead. When you mark a residence inactive, it enables you to keep the residence record but not make it available for use.
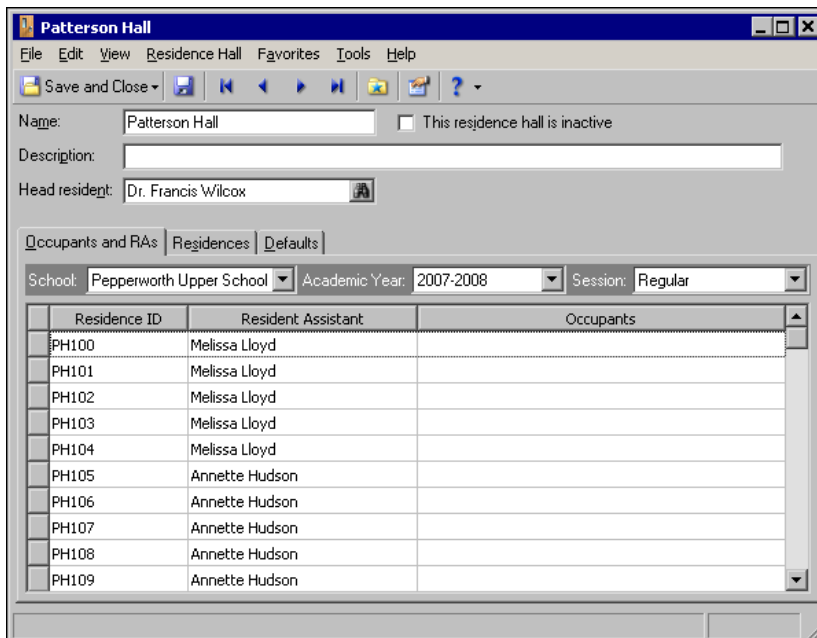
1. On the Residence Life page, in the **Residence Life Setup** frame, click **Set up residence halls and residences**. The Residence Halls page appears.
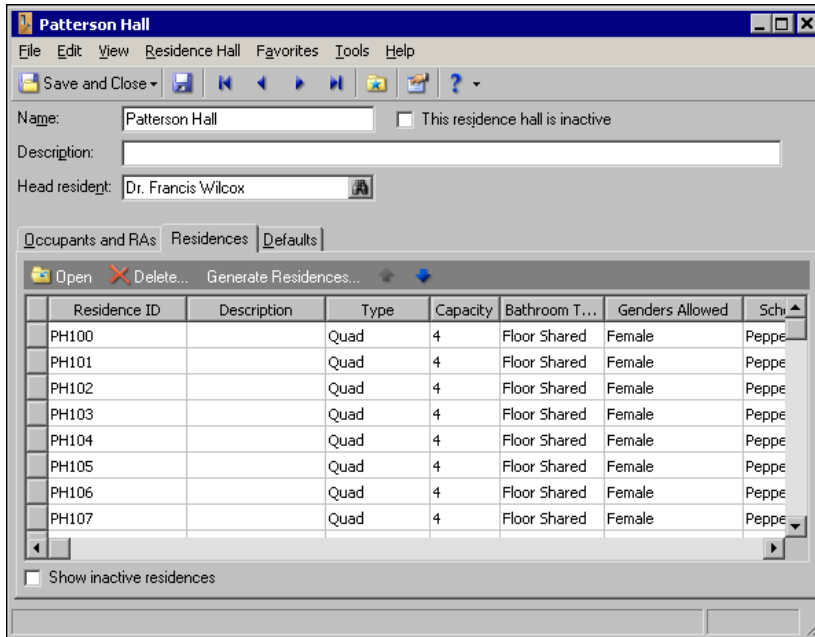

2. In the Residence Halls page grid, select a residence hall.

Note: For information about how to enter information on the residence hall record, see "Set up a residence hall" on page 8.
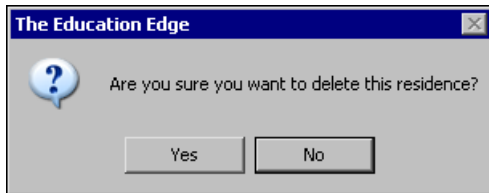
3. Click **Open**. The residence hall screen appears.

4. Select the Residences tab. The **Residences** grid appears.

5. In the **Residences** grid, select a residence and click **Delete**. A warning message appears.

6. Click **Yes**. The residence deletes and you return to the residence hall record.

Enter Residence Life Information

In *Residence Life*, you enter residence life information for students in grid view or in student view. In grid view, you enter residence life information by the residence. In student view, you enter residence life information by the student. To assist your entry of residence life information, we recommend the following queries.

*   A query of resident students who do not have a residence assignment yet. You create a student query and filter on " equals Resident" and "Residence blank". You can also include the school, academic year, and session if you are entering residence life information for a specific session.

*   A query of empty residences for a school, academic year, and session. A list of empty residences can help you when you are searching for an open residence for an incoming student or a returning student requesting a roommate switch. You create a room query and filter on "Is a Residence? equals Yes", "Has maximum capacity? equals No", school, academic year, and session. On the Output tab, you can also include residence information, such as room ID, room description, and current occupant information to assist your placement of students.

Enter Residence Life Information in Student View

Before you can enter residence life information, the student must have a student progression entry for that year. If the student does not have a student progression entry for the year, a message appears asking you to create one. For more information about student progression entries, see the Students chapter of the *Records Guide for Registrar's Office*.

▶ **Enter Residence Life Information in Student View**

1. On the Residence Life page, click **Enter residence life information - student view**. The Enter Residence Life Information screen appears.

2. If you have multiple schools, in the **School** field, select the school to enter residence life information.

3. In the **Academic year** field, select the year.

4. In the **Session** field, select the session.

5. In the **Enter for** field, any existing student queries appear. Select "<All Students>", select an existing student query, click the binoculars to search for the query, or click the binoculars and add a new query. For more information about how to create a query, see the *Query Guide*.

Warning: When you search for a student, only students with a student progression entry appear.

6. In the **Student** field, enter the student name or click the binoculars to search for the student.

   After you select a student, to open and review the student's record, click the magnifying glass.

7. To go to another student record, you can click the first, previous, next, or last buttons. The records available to go to depend on your selection in the **Enter for** field and whether the student has a student progression entry.

8. To assist entry of residence life information, in the **Show** field, you can select to view "Current residence life information" or "Housing request information".

   To copy residence life information from the current residence life information or housing request information to the new session, click **Copy**.

9. In the **Board type** field, select the type of boarding the student needs. For example, you can designate the different types of living arrangements at your school such as on-campus resident, off-campus resident, or resident assistant.

10. In the **Residence hall** field, select the residence hall in which the student resides. If you edit the residence hall and it no longer matches the residence, the residence information is deleted.

11. In the **Residence** field, click the binoculars to select the student's residence. After you select the residence, you can click the magnifying glass to open the residence.

12. In the **Phone number** field, enter the phone number for the student's residence.

13. In the **Mailbox** field, enter the student's mailbox number.

Warning: If you have *Student Billing* and the student has an existing meal plan, a screen appears for you to enter the effective date for the new meal plan.

14. In the **Meal plan** field, select the student's meal plan.

15. In the **Partial Year Information** frame, you enter dates if the student began the semester late or left early.

    In the **Late start date** field, enter the date the student began the semester.

16. In the **Early withdrawal date** field, enter the date the student withdrew. When you enter a withdrawal date, the student's billing account may be credited depending on the Reversal Schedules you set up in *Student Billing*. For more information, see the *Configuration Guide for Student Billing*.

17. In the **Comments** box, enter any comments you want to save on the residence life record.

18. In the **Roommates** frame, mark **Private room** if the student resides in a private room.

19. In the **Roommates** grid, **Student** column, enter the roommate's name or click the binoculars to search for the student.

20. Click **Save and Close**. You return the Residence Life page.

Enter Residence Life Information in Grid View

Before you can enter residence life information, the student must have a student progression entry for that year. If the student does not have a student progression entry for the year, a message appears asking you to create one. For more information about student progression entries, see the Students chapter of the *Records Guide for Registrar's Office*.

▶ **Enter Residence Life Information in Grid View**

1. On the Residence Life page, click **Enter residence life information - grid view**. The Enter Residence Life Information screen appears.

2. If you have multiple schools, in the **School** field, select the school to enter residence life information.

3. In the **Academic year** field, select the year.

4. In the **Session** field, select the session.

5. In the **For students with no board type, use** field, select the board type.

Tip: You can edit the **Occupant columns to show** field only when there are no residences in the residence life grid. Enter the number of occupant columns to show before you enter residence information or clear the grid.

6. In the **Occupant columns to show** field, enter the number of occupants you need per residence.

7. In the **Residence** column, click the binoculars to search for and select the residence.

8. In the **Capacity** column, the number of occupants allowed in the residence appears.

9. In the **Occupant 1** column, enter the student's name or click the binoculars to search for the student.

Continue to enter occupants for the residence until you reach capacity or until you are ready to enter residence life information for a new residence.

10. When you are ready to save the residence life information, click **Commit**. The saved residence life information is removed from the grid.

11. To return to the Residence Life page, click the **X** in the upper right corner.

Reporting

On the Residence Life page, you can print a residence life report or a rooms list. You can also access these reports from the Directories and Lists report category in *Reports*.

The Residence Life Report lists the residence and meal plan information for selected students. You can include students that do not have a residence or meal plan yet.

The Room List Report displays a list of the rooms in your school. You can include or exclude rooms that are marked as inactive.

▶ **Print a residence life report**

1. On the Residence Life page, click **Print residence life report**. The Select a Parameter File screen appears.

Tip: To edit the report before you print, click **Open**.

2. Select a report to print or click **Add New** to create a new Residence Life Report. For more information about how to create a new Residence Life Report, see the *Reports Guide for Registrar's Office.*

3. Click **Select**. Your report prints. You return to the Residence Life Page.

▸ **Print a rooms list**

1. On the Residence Life page, click **Print rooms list**. The Select a Parameter File screen appears.
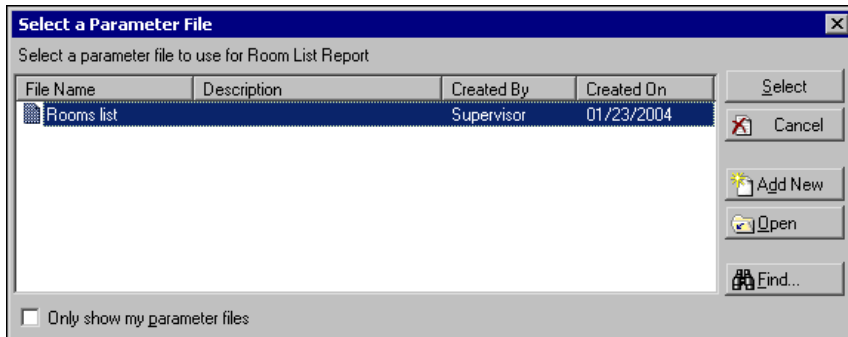
Tip: To edit the report before you print, click **Open**.

2. Select a list to print or click **Add New** to create a new Room List Report. For more information about how to create a new Room List Report, see the *Reports Guide for Registrar's Office.*

3. Click **Select**. Your report prints. You return to the Residence Life Page.

Index

V