Financial Clearance

General Information: The Financial Clearance page compares financial information between the current date and same date last year.

Prompt Filters:
- Default prompt values:
  - Student School = College of Arts and Science; College of Nursing; Ctr for Urban Science & Progr; Faculty of Arts and Science; Gallatin Schl of Indv Study; Global Public Health; Sch Profsnl Std; Silver School of Social Work; Steinhardt Sch Cult/Ed/HumDev; Stern School of Business; Study Abroad; Tandon School of Engineering; Tisch School of the Arts; University Programs.
  - The default population of schools reflected is comprised of all Undergraduate programs. All Graduate programs, SPS and Dentistry are excluded from the de-enrollment process and as such are excluded from this report.
  - All Shanghai ‘UISHG’ student are currently excluded form this process. In addition, anyone in the ‘NOTUITFEES’ Selection Group will have the Tuition Calc Flag set to ”N” (no calc required). No clearance is required for these populations.
  - Degree = Undergraduate.
  - Term Type = current term.
  - Academic Load Actual = includes all values minus ”No Unit Load”.
  - Note: the date will always show the current and ‘same time last year’.

“Financial Clearance Status” report:
- Use the view selector drop-down menu to switch between graph and pivot table.
- The graph shows the Not Financially Cleared Headcount.
- The pivot table shows the overall student headcount for Financially Cleared, Not Financially Cleared and Temporarily Cleared status.
- Percentages out of the total headcount (Cleared + Not + Temp) are displayed for each financial clearance status.

<table>
<thead>
<tr>
<th>Financial Clearance Status</th>
<th>Financial Clearance Status Bursar</th>
<th>Financial Clearance Flag</th>
<th>Financial Clearance Status Financial Aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clear</td>
<td>Clear</td>
<td>YB</td>
<td>No</td>
</tr>
<tr>
<td>Clear</td>
<td>YM</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Clear</td>
<td>YM</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Clear</td>
<td>YM</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Clear</td>
<td>YO</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Not Available</td>
<td>Not Available</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Not Clear</td>
<td>Not Clear</td>
<td>NC</td>
<td>No</td>
</tr>
<tr>
<td>Not Clear</td>
<td>Not Clear</td>
<td>EP</td>
<td>No</td>
</tr>
<tr>
<td>Not Clear</td>
<td>Not Clear</td>
<td>NT</td>
<td>No</td>
</tr>
</tbody>
</table>

Bursar Financial Clearance Status Definitions:
- If Ps_nyu_fin_clrmc.Nyu_Fin_Clr_Flg IN (NC, NT, NP) then Bursar Financial Clearance Status=‘Not Clear’
- If Ps_nyu_fin_clrmc.Nyu_Fin_Clr_Flg IN (YB, YM, YO) then Bursar Financial Clearance Status=‘Clear’
- If Ps_nyu_fin_clrmc.Nyu_Fin_Clr_Flg IN (YT) then Bursar Financial Clearance Status=‘Temp Clear’

Financial Aid/School-based Temporary Clearance Status Definitions:
- If ps_d_svc_ind.srvc_ind_cd='XYT' and ps_d_svc_ind.eff_end_dt >= CURRENT_DATE then ‘Y’
- Otherwise it is ‘N’

Financial Clearance Status Definitions:
- Financial Clearance status (FC= Clear, TC=Temp Clear, NC=Not Clear) is derived, and ‘Temp Clear’ is defined as follows:
  - The student's enrollment status must be ‘E’.
  - Temp clearance is either set by Bursar’s office OR (set by FA office/school and Bursar’s office hasn’t cleared it)
  - If Bursar Financial Clearance Status=‘Temp Clear’ OR (Financial Aid/School-based Temporary Clearance Status=’Y and Bursar Financial Clearance Status=Not Clear) then Financial Clearance status=’ Temp Clear’
  - If Bursar Financial Clearance Status=‘Not Clear’ then Financial Clearance Status=‘Not Clear’
  - If Bursar Financial Clearance Status=‘Clear’ then Financial Clearance Status=‘Clear’
  - If Financial Clearance Status is NULL, replace it with ‘Not Clear’.

“By Student School” report:
- The pivot table shows the Financially Cleared, Not Financially Cleared and Temporarily Cleared student headcount, by school.
• Percentages out of the total headcount (Cleared + Not + Temp) are displayed for each financial clearance status, by school.

"By New/Continuing Type" report:

• Use the view selector drop-down menu to switch between graph and pivot table.
• The horizontal bar graph displays the Not Financially Cleared student headcount for each New/Continuing Type value.
• The pivot table shows the Financially Cleared, Not Financially Cleared and Temporarily Cleared student headcount, by New/Continuing Type.
• Percentages out of the total headcount (Cleared + Not + Temp) are displayed for each financial clearance status, by New/Continuing Type.

"By Academic Level" report:

• Use the view selector drop-down menu to switch between graph and pivot table.
• The horizontal bar graph displays the Not Financially Cleared student headcount, by the student Academic Level.
• The pivot table shows the Financially Cleared, Not Financially Cleared and Temporarily Cleared student headcount, by the student Academic Level.
• Percentages out of the total headcount (Cleared + Not + Temp) are displayed for each financial clearance status, by the student Academic Level.

"By Domestic/International Status" report:

• Use the view selector drop-down menu to switch between graph and pivot table.
• The horizontal bar graph displays the Not Financially Cleared student headcount for Domestic/International status.
• The pivot table shows the Financially Cleared, Not Financially Cleared and Temporarily Cleared student headcount, by Domestic/International status.
• Percentages out of the total headcount (Cleared + Not + Temp) are displayed for each financial clearance status, by Domestic/International status.

Note: you can drill down to view detailed student information by clicking on a number and the "Show Student Detail" button.