MyUNLV University of Nevada, Las Vegas

PeopleSoft Student Information System

View Customer Accounts

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View Customer Accounts

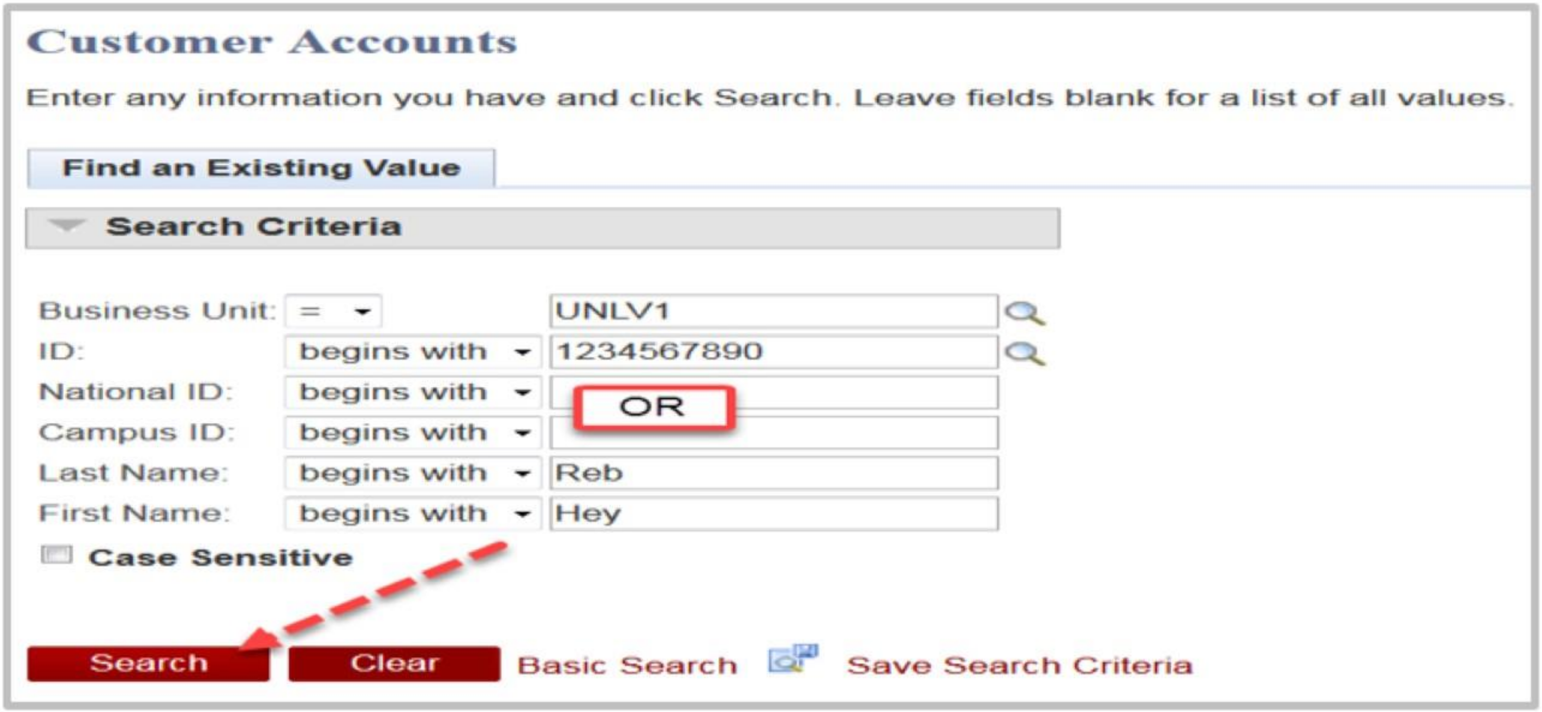
Overview

- ❑ **Student Balance and Account Details information**
  - All charges and fees
  - Item Details
  - Due Dates
  - Refunds
- ❑ **Anticipated Aid link-View awards for the Term**
- ❑ **Academic Information links:**
  - Residency-Out of State / In State / Academic Plan & Enrollment information
- ❑ **Payment Plans link (PPL) which includes Third Party Contract (TPC) information**

❑Financial Impacts

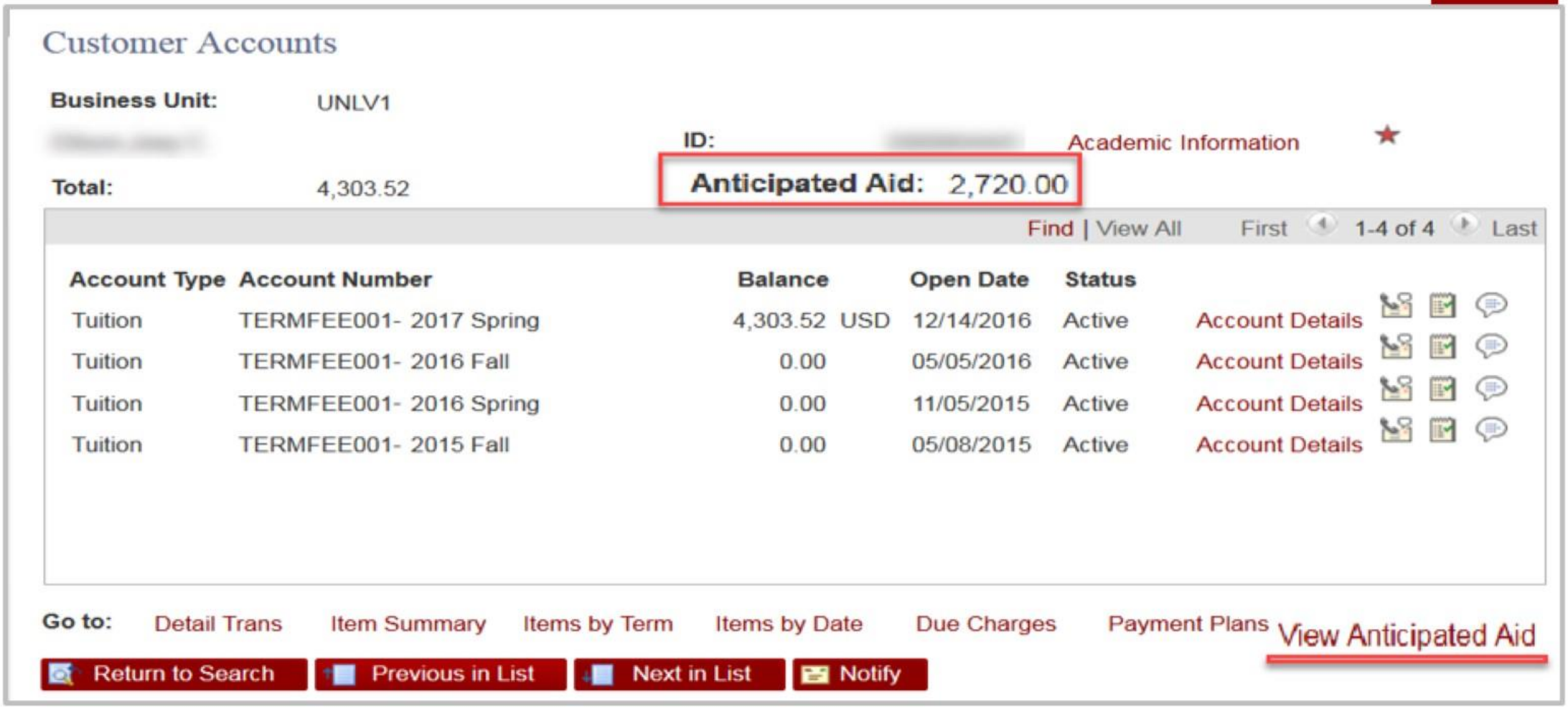
View Customer Accounts

Navigation:
Student Financials > View Customer Accounts



- Enter Student NSHE ID or Last/First Name
- Click the SEARCH button
- This will take you to the Customer Accounts page

Customer Accounts



- Each new Term creates a new Tuition row With Account Details.
- The Anticipated Aid field when populated, displays the link View Anticipated Aid.

  Note: The View Anticipated link displays ONLY when Aid has been authorized, once the FA is applied to account, the link disappears.

View Anticipated Aid

Anticipated Aid Details link

Anticipated Aid Details

Find First 1 of 1 Last

Term: 2017 Spring **Term Total:** 2,720.00

Find | View All First 1-3 of 3 Last

Item Type	Career	Date	Apply Dt	Expire Dt	Net Award
Music Grant	UGRD	12/16/2016 10:26:16AM	01/09/2017	03/10/2017	1,500.00
Lou Weiner Sch-Band Endowment	UGRD	12/16/2016 10:26:16AM	01/09/2017	05/09/2017	220.00
Bennett Family Honors Scholars	UGRD	12/16/2016 10:26:16AM	01/09/2017	04/09/2017	1,000.00

Return

The View Anticipated details page displays the Amount and Type(s) of Financial Aid authorized for the Term.
~Scholarships, Grants, Sub Loans/ Unsub Loans~

Account Details

Class	Installment ID	Last Activity Date	Balance	
Credit Card Payment	2015 Sumr		-325.00	Item Details
		07/01/2015	0.00	
Residential Life Key Fee	2015 Fall		15.00	Item Details
		09/26/2015	0.00	
Res Life Meal Plan Change Fee	2015 Fall		25.00	Item Details
		09/14/2015	0.00	
Residential Life Meal Plan	2015 Fall		0.00	Item Details
		09/11/2015	0.00	
Residential Life Meal Plan	2015 Fall		2,000.00	Item Details
		09/11/2015	0.00	
Federal Direct Subsidized Loan	2015 Fall		-1,732.00	Item Details
		08/24/2015	0.00	
Federal Direct Unsub Loan	2015 Fall		-990.00	Item Details
		08/24/2015	0.00	
Non Resident WUE Tuition	2015 Fall		0.00	Item Details
		08/20/2015	0.00	
Residential Life Room Fee	2015 Fall		2,615.00	Item Details
		08/01/2015	0.00	
Orientation Fee	2015 Fall		120.00	Item Details
		05/04/2015	0.00	
E-check Payment	2016 Sprg		-1,460.08	Item Details
		01/20/2016	0.00	

The Account Details page displays all financial data transactions and charges & Fees:

- Financial Aid, Refunds Housing Fees, Waivers, Payments & Registration & Mandatory Fees.

Mandatory & Registration Fees

Account Details

ID: [redacted]

Account Number: TERMFEE001- 2017 Sumr

Business Unit: UNLV1

Account Balance: 2,081.50

Debits: 2,081.50 **Credits:** 0.00 **Applied:** 0.00 **Unapplied:** 0.00

Find | View 3 First 1-12 of 12 Last

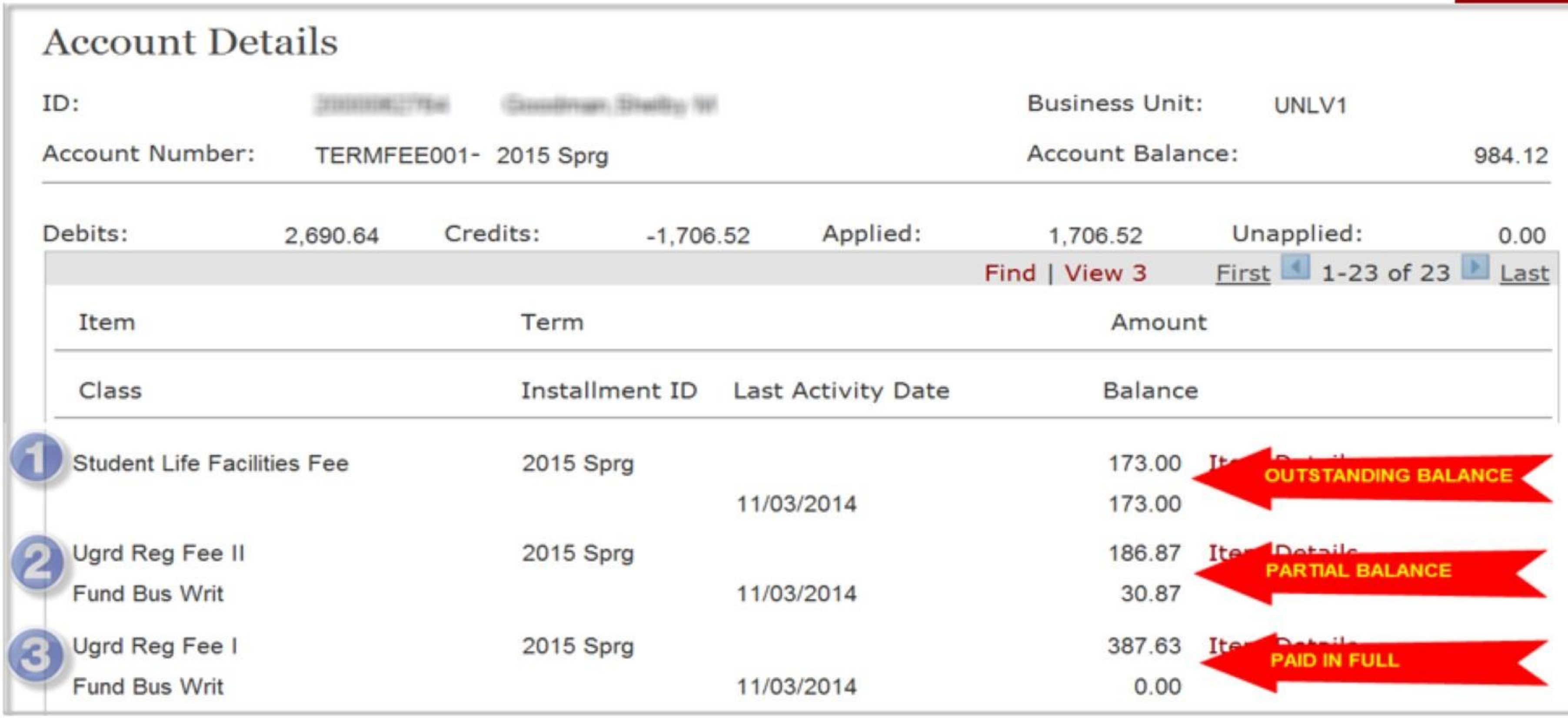
Item / Class	Term / Installment ID	Last Activity Date	Amount / Balance	
Distance Education Fee	2017 Sumr		102.00	Item Details
Sec Education Curriculum		04/06/2017	102.00	
Distance Education Fee	2017 Sumr		102.00	Item Details
Parent Involv Sp & Gen Ed		04/06/2017	102.00	
Graduate Student Services Fee	2017 Sumr		15.00	Item Details
Sec Education Curriculum		04/06/2017	15.00	
Graduate Student Services Fee	2017 Sumr		15.00	Item Details
Parent Involv Sp & Gen Ed		04/06/2017	15.00	
Student Health Charge	2017 Sumr		37.00	Item Details
		04/06/2017	37.00	
Student Life Facilities Fee	2017 Sumr		87.00	Item Details
		04/06/2017	87.00	
Summer - Grad Reg Fee I	2017 Sumr		831.87	Item Details
Parent Involv Sp & Gen Ed		04/06/2017	831.87	
Summer - Grad Reg Fee II	2017 Sumr		8.88	Item Details
Parent Involv Sp & Gen Ed		04/06/2017	8.88	

Every student is charged **Mandatory** fees-these will vary depending on Career.

Go to Common Tuition & Fees at **WWW.UNLV.EDU/CASHIERING/TUITION-FEES**

Registration fees are divided by Reg I (State) and Reg II (Non State)

Review Balance on Account



Account Details

ID: [illegible] [illegible]

Business Unit: UNLV1

Account Number: TERMFEE001- 2015 Sprg

Account Balance: 984.12

Debits: 2,690.64 Credits: -1,706.52 Applied: 1,706.52 Unapplied: 0.00

Find | View 3 First 1-23 of 23 Last

	Item / Class	Term / Installment ID	Last Activity Date	Amount / Balance
1	Student Life Facilities Fee	2015 Sprg		173.00
			11/03/2014	173.00
2	Ugrd Reg Fee II	2015 Sprg		186.87
	Fund Bus Writ		11/03/2014	30.87
3	Ugrd Reg Fee I	2015 Sprg		387.63
	Fund Bus Writ		11/03/2014	0.00

Note: When a student enrolls, the fees are posted on account creating a 2 line entry for each Fee.

1. Outstanding Balance-student owes fee.
2. Partial Balance Owed-student paid a portion of the fee.
3. Fees Paid in Full-the zero's represents fee has been paid.

Refunds > Item Details link

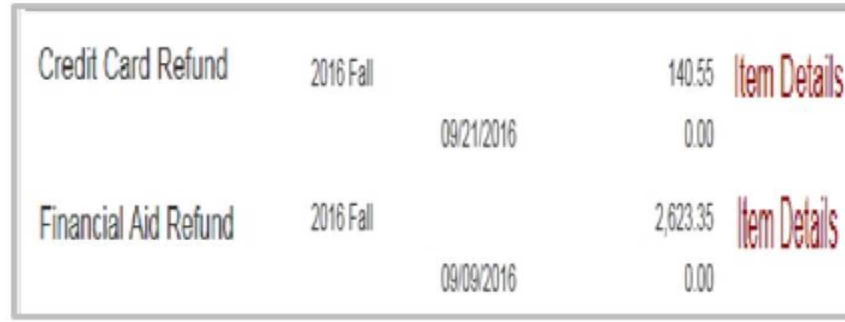
There are **three** types of Refunds; FA, Non Financial Aid & Refund to Credit Card.

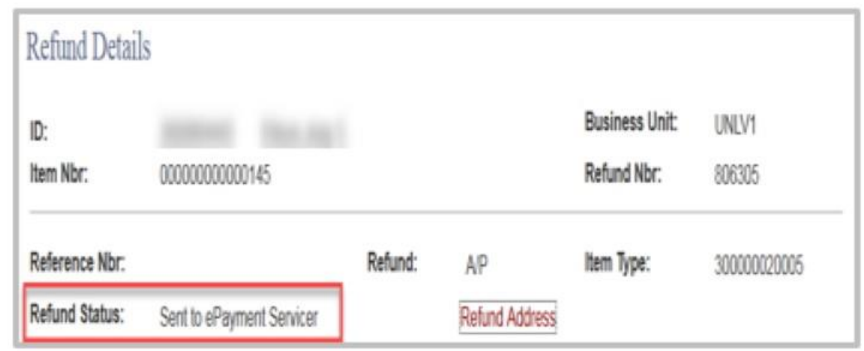
*Non FA-usually from a overpayment

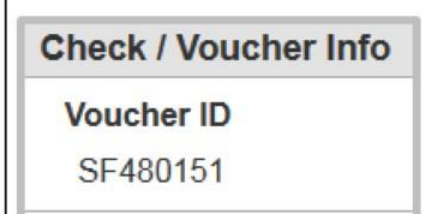
Click on the Item Details link to view the details of a refund or any other transaction.

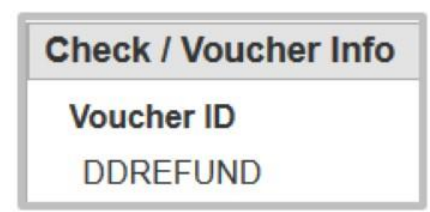
- Credit Card Refund-are credited back to credit card-Status displays-Sent to ePayment Service
- Refunded by Check-Voucher nbr
- Refunded by Direct Deposit-DDREFUND

Click on the Item Details link to view the Refund Details.









Payment Plans link

Customer Accounts

Business Unit: UNLV1

ID:

Total: 1,663.73 Anticipated Aid: 0.00 Academic Information

Find | View All First 1-7 of 10 Last

Account Type	Account Number	Balance	Open Date	Status	
Payment Pl	PPL004 - 2014 Spring	1,535.23 USD	01/19/2014	Active	Account Details
Tuition	TERMFEE001- 2014 Spring	128.50	11/18/2013	Active	Account Details
Payment Pl	PPL003 - 2013 Fall		08/24/2013	Active	Account Details
Tuition	TERMFEE001- 2013 Fall	0.00	04/30/2013	Active	Account Details
Payment Pl	PPL002 - 2013 Spring	0.00	01/18/2013	Active	Account Details
Tuition	TERMFEE001- 2013 Spring	0.00	12/13/2012	Active	Account Details
Tuition	TERMFEE001- 2012 Fall	0.00	04/17/2012	Active	Account Details

Late Fees

Go to: Detail Trans Item Summary Items by Term Items by Date Due Charges Payment Plans

- When a student enrolls in a Payment Plan (PPL), all fees move from a Tuition Term Fee row to a new PPL row that is created by the Payment Plan assignment (when Late Fees are assessed- those remain on the Tuition Term Fee row).
- The PPL line displays the installment payment amounts and balance.

Note: Summer Term-students must be manually placed on PPL's

Payment Plans (PPL) / Third Party Contracts (PPL)

Go to: Detail Trans Item Summary Items by Term Items by Date Due Charges Payment Plans View Anticipated Aid

Payment Plans link displays all current and past term contract information for Payment Plans and Third Party Contracts, also if contract is Active or has been Cancelled.

Payment Plan

Business Unit: UNLV1

ID: [illegible] [illegible]

Personalize | Find | View All | | First 1-4 of 4 Last

Plan Description | Plan Detail

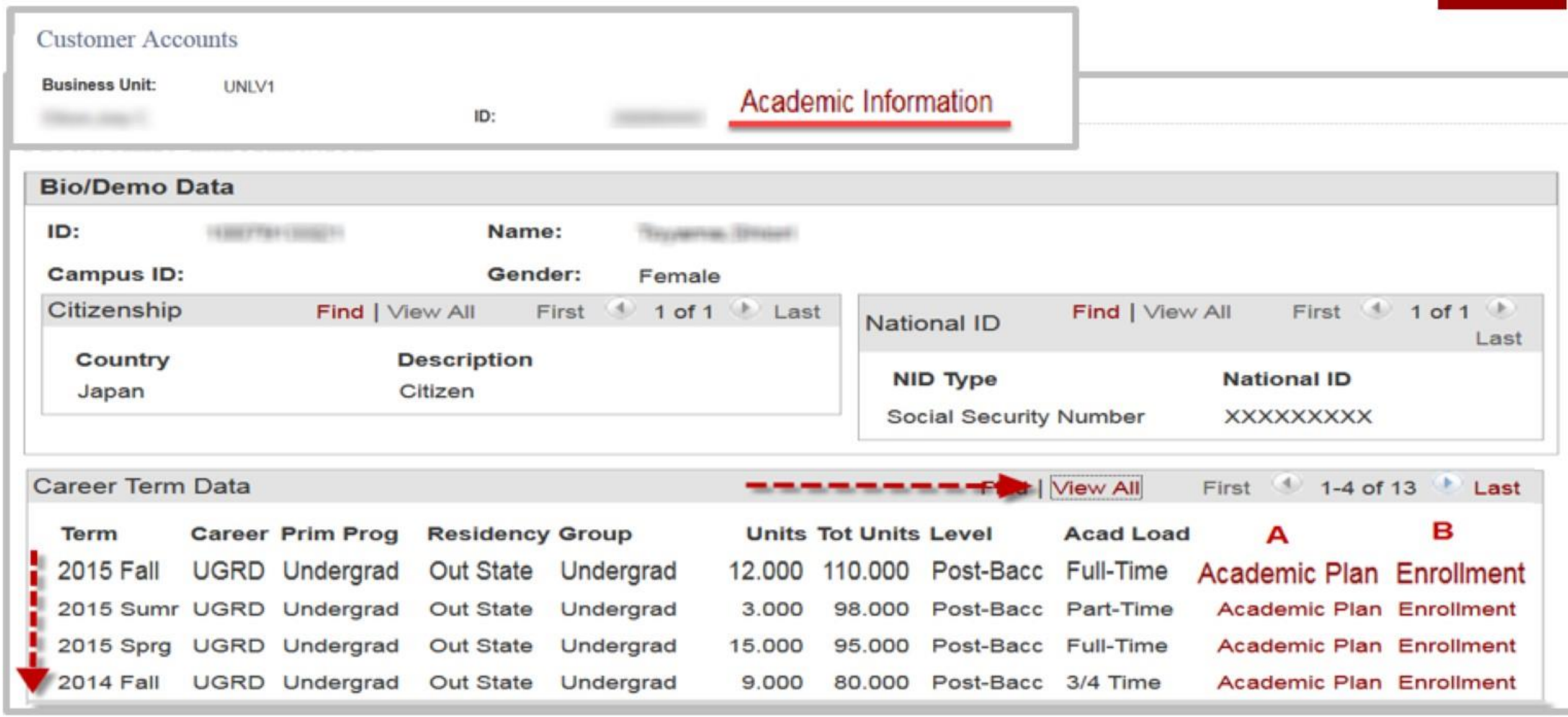
Contract Nbr	Contract Description	Contract Type	Plan Type	External Org ID	Contract Status
2148_4PAY_PLAN_13DUE	4 Payment Mid Plan - Fall 2014	Payment Plan	Calculated		Active
2148_4PAY_PLAN_13DUE	4 Payment Mid Plan - Fall 2014	Payment Plan	Calculated		Cancelled
2108_TEACH_2_PLUS_2	Fall 2010 Teach 2+2 Program	Third Party		SF000000068	Active
2112_TEACH_2_PLUS_2	Teach 2 + 2 Spring 2011	Third Party		SF000000068	Active
2115_TEACH_2_PLUS_2	Teach 2 + 2 Summer 11	Third Party		SF000000184	Active

Return

This page above displays types of Plans-Payment (PPL) or Third Party (TPC). TPC are contracts created when a business organization has agreed to pay students tuition; part/all or certain fees. Once assigned to a TPC contract the amount of tuition is reduced by transferring to a Third Party contract.

Transfer to Third Party	2015 Sprg		-1,584.00	Item Details
		12/12/2014	0.00	

Academic Information link


Customer Accounts

Business Unit: UNLV1

ID:

Academic Information

Bio/Demo Data

ID:

Name:

Campus ID:

Gender: Female

Citizenship — Find | View All — First 1 of 1 Last

Country	Description
Japan	Citizen

National ID — Find | View All — First 1 of 1 Last

NID Type	National ID
Social Security Number	XXXXXXXXX

Career Term Data — Find | View All — First 1-4 of 13 Last

Term	Career	Prim Prog	Residency	Group	Units	Tot Units	Level	Acad Load	A	B
2015 Fall	UGRD	Undergrad	Out State	Undergrad	12.000	110.000	Post-Bacc	Full-Time	Academic Plan	Enrollment
2015 Sumr	UGRD	Undergrad	Out State	Undergrad	3.000	98.000	Post-Bacc	Part-Time	Academic Plan	Enrollment
2015 Sprg	UGRD	Undergrad	Out State	Undergrad	15.000	95.000	Post-Bacc	Full-Time	Academic Plan	Enrollment
2014 Fall	UGRD	Undergrad	Out State	Undergrad	9.000	80.000	Post-Bacc	3/4 Time	Academic Plan	Enrollment

The **Academic Information** link displays Bio information, Career Term Data for each Term which includes Residency status and Units enrolled.

A. The **Academic Plan** link displays Academic/Sub Plan Career information.

B. The **Enrollment** link displays a summary of enrolled classes.

Enrollment Summary

Academic Information

Enrollment Summary

ID:

Find | View All   First 1-4 of 4 Last

Class #		Subject	Catalog / Component	Session / Census Date	Section	Status	Reason	Basis	Prog Units / Bill Units	Add Date / Drop Date
81481	Class Info	CED	400	Regular	1001	Dropped	Drop Enrl	Graded	3.00	04/15/2015
Field Exp in Human Serv I			Lecture				Student Drop		3.00	09/01/2015
84689	Class Info	CRJ	301	Regular	1001	Enrolled	Enrolled	Graded	3.00	04/17/2015
Resh Methods in Crj			Lecture						3.00	
85446	Class Info	PUA	241	Regular	1002	Enrolled	Enrolled	Graded	3.00	04/14/2015
Survey of Public Admin			Lecture						3.00	
85744	Class Info	CED	375	Regular	1001	Enrolled	Enrolled	Graded	3.00	04/15/2015
Eth/Prof Issues Hum Serv			Lecture						3.00	

- When enrollment occurs, this creates the first top row, when the class is dropped or withdrawn, a new row is inserted with date of transaction.
- The Reason code displays what type of “reason” this class was a Student Drop or Administratively Withdrawn.

Enrollment Summary
Drop Reason Codes Examples

Academic Information

Enrollment Summary

ID:

Summer Term: The Reason code that is used is PURG- Dropped for Non Payment

A

Find | View All First 1-2 of 2 Last

Class #	Subject	Catalog Component	Session Census Date	Section	Status	Reason	Basis	Prog Units Bill Units	Add Date Drop Date
51691 Class Info Serial Killers & Sex Pred	CRJ	325 Lecture	Summer 2	1001	Dropped	Drop Enrl Drop for non-payment	Graded	3.00 3.00	06/04/2016 06/06/2016
52416 Class Info Crit Thinking & Reasoning	PHIL	102 Lecture	Summer 2	1004	Dropped	Drop Enrl Drop for non-payment	Graded	3.00 3.00	06/04/2016 06/06/2016

Academic Information

Enrollment Summary

ID:

B

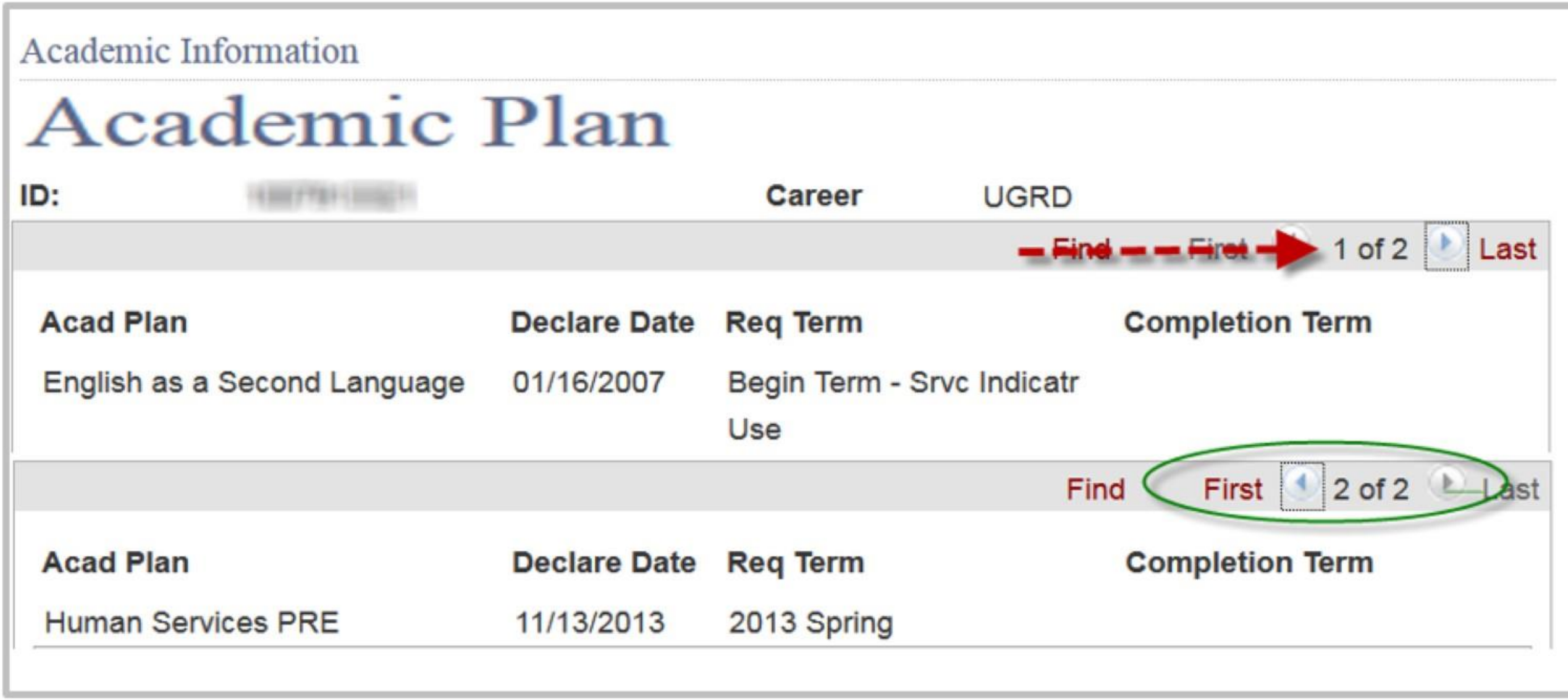
Find | View All First 1-5 of 5 Last

DROP CODES FROM ENROLLMENT PAGE

Class #	Subject	Catalog Component	Census Date		Status	Reason	Basis	Prog Units Bill Units	Add Date Drop Date
81983 Class Info Marketing Management	MKT	301 Lecture	Regular	SHLT	Dropped	Drop Enrl Health Withdrawal 100% Refund	Graded	3.00 3.00	04/22/2016 08/10/2016
84624 Class Info Communication Theory	COM	400* Lecture	Regular	PERC	Dropped	Drop Enrl Drop - Requisite Not Satisfied	Graded	3.00 3.00	04/25/2016 08/10/2016
84625 Class Info The Rhetorical Tradition	COM	409 Lecture	Regular	ADRP	Dropped	Drop Enrl Administrative Drop 100% Refun	Graded	3.00 3.00	04/25/2016 08/10/2016
85285 Class Info Sel Top Comm Thry	COM	319 Lecture	Regular	AHLF	Dropped	Drop Enrl Administrative Drop 50% Refund	Graded	3.00 3.00	04/22/2016 08/10/2016
87691 Class Info Selected Topics in Com Studies	COM	330 Lecture	Regular	CANC	Dropped	Drop Enrl Canceled Class 100% refund	Graded	3.00 3.00	04/22/2016 08/10/2016

Return

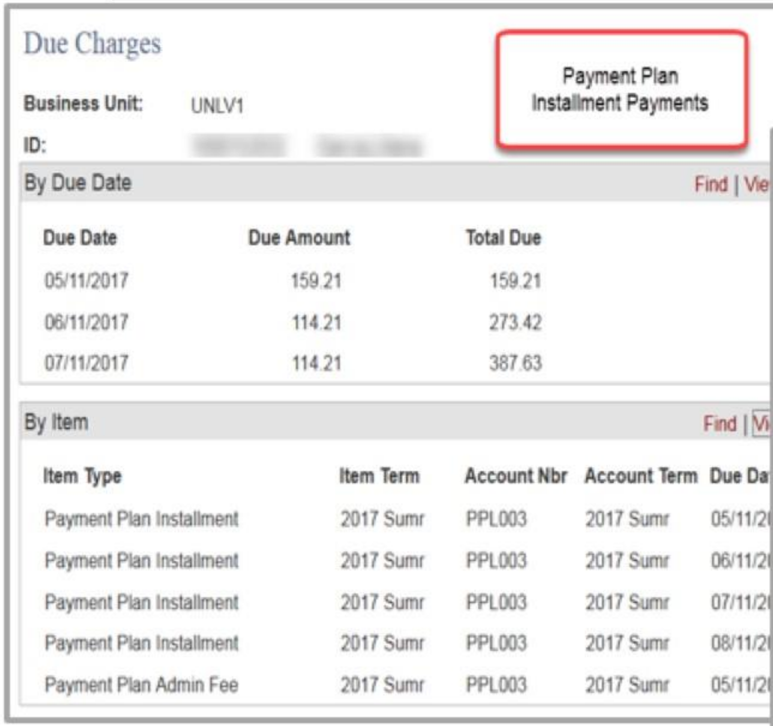
Academic Plan



The **Academic Plan** link displays Academic/Sub Plan Career information.
A student can change plans and sub plans creating many rows of data.

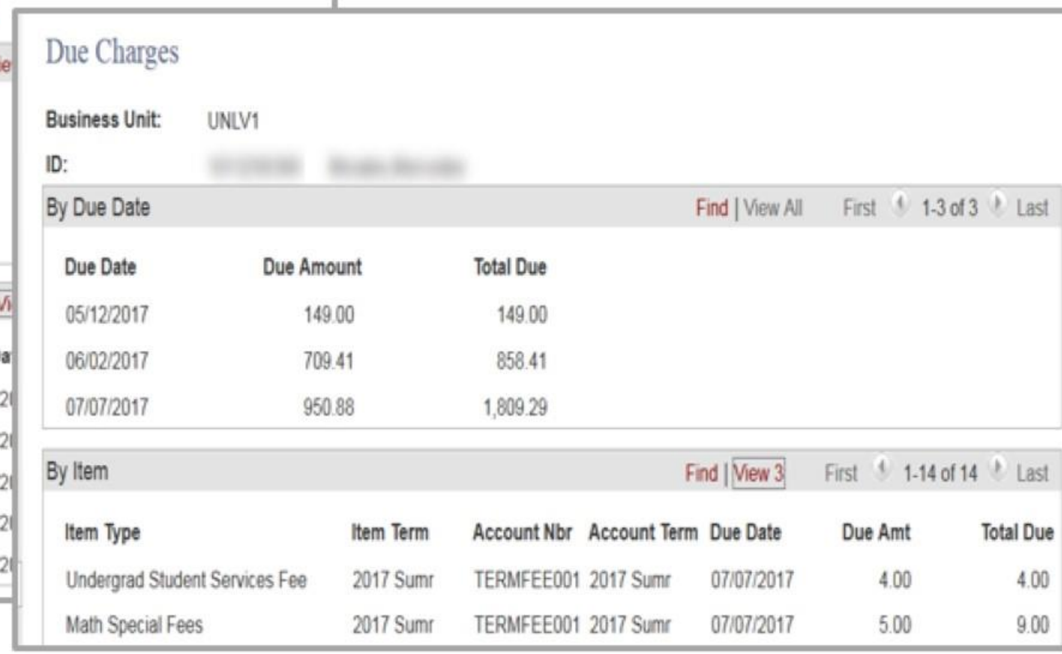
Go to links: Due Charges

Go to: Detail Trans Item Summary Items by Term Items by Date **Due Charges** Payment Plans



Due Date	Due Amount	Total Due
05/11/2017	159.21	159.21
06/11/2017	114.21	273.42
07/11/2017	114.21	387.63

Item Type	Item Term	Account Nbr	Account Term	Due Da
Payment Plan Installment	2017 Sumr	PPL003	2017 Sumr	05/11/2
Payment Plan Installment	2017 Sumr	PPL003	2017 Sumr	06/11/2
Payment Plan Installment	2017 Sumr	PPL003	2017 Sumr	07/11/2
Payment Plan Installment	2017 Sumr	PPL003	2017 Sumr	08/11/2
Payment Plan Admin Fee	2017 Sumr	PPL003	2017 Sumr	05/11/2



Due Date	Due Amount	Total Due
05/12/2017	149.00	149.00
06/02/2017	709.41	858.41
07/07/2017	950.88	1,809.29

Item Type	Item Term	Account Nbr	Account Term	Due Date	Due Amt	Total Due
Undergrad Student Services Fee	2017 Sumr	TERMFEE001	2017 Sumr	07/07/2017	4.00	4.00
Math Special Fees	2017 Sumr	TERMFEE001	2017 Sumr	07/07/2017	5.00	9.00

The Go To links display the financial data displayed in the Account Details but formatted differently.

- The Due Charges link displays the due dates for all tuition fees and Payment Plans. Not all fees have the same due date.

Note: All pages and links found in View Customer Accounts are "View Only."

Financial Impacts

Actions that effect data on a students account

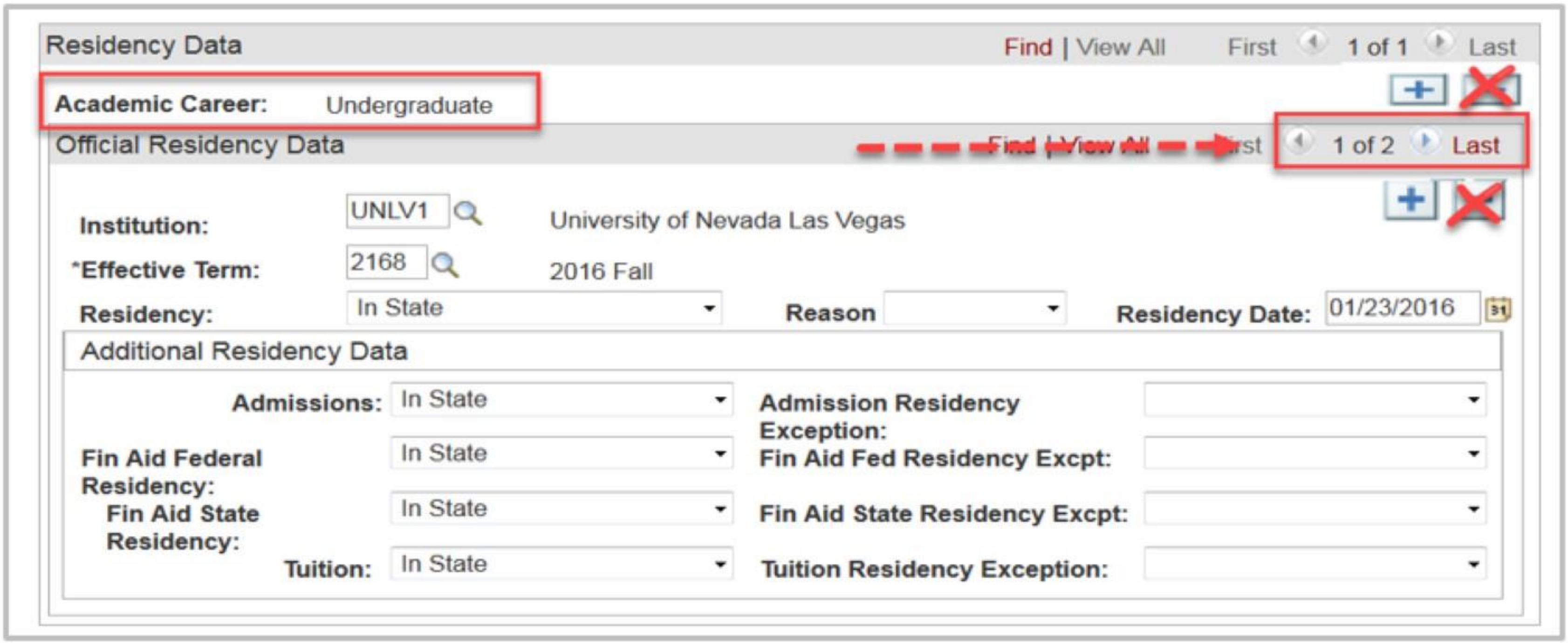
The Following slides are components which impact Financial data on a students account.

Student Groups / Study Agreement Impacts to Students Financial data

Students who are assigned to some **Student Groups** are coded to either **ADD** fees or **REMOVE** fees or tracking a special group of students.
Study Agreement (External Study) identifies groups of students who are charged differently than other students.

Warning:
Deleting a Effective Dated row with a Status of Active, Start / End Dates-may result in fees reversing (student receiving a refund) or charges applying (student receiving late fees).

Residency
Impacts to Students Financial data



Residency changes must be completed by **adding** Effective Dated rows to both Academic Career (when applicable) or changing Residency status (In State/ Out of State).

Deleting historical data will result in residency fees reversing or applying.

Service Indicators

Service Indicators or Holds?

- Called Service Indicators for internal use.
- Displayed as "Holds" to students in Student Center.

- Positive – does not affect registration and is generally just a notification, for example FA will request the Student Accounts Mgr. to exclude students from Late Fees or Enrollment Cancellation by placing a Positive Service indicators on these accounts.
- Negative –It is **very important** to view the content of each placed Service Indicator-**not all are due to financial holds**.

Note: Past Due Holds Service Indicators are now synched across NSHE, this new process allows us to view students who have outstanding balances with other Institutions. Students can view message of the Service Indicator with instructions in their Self Service Center.

NEGATIVE

POSITIVE

Tuition Calculation
Updating data by "T Calc" Process

- When changes are made to a student's account by adding, changing or removing data, the Tuition Calc process should be completed at the time of change.

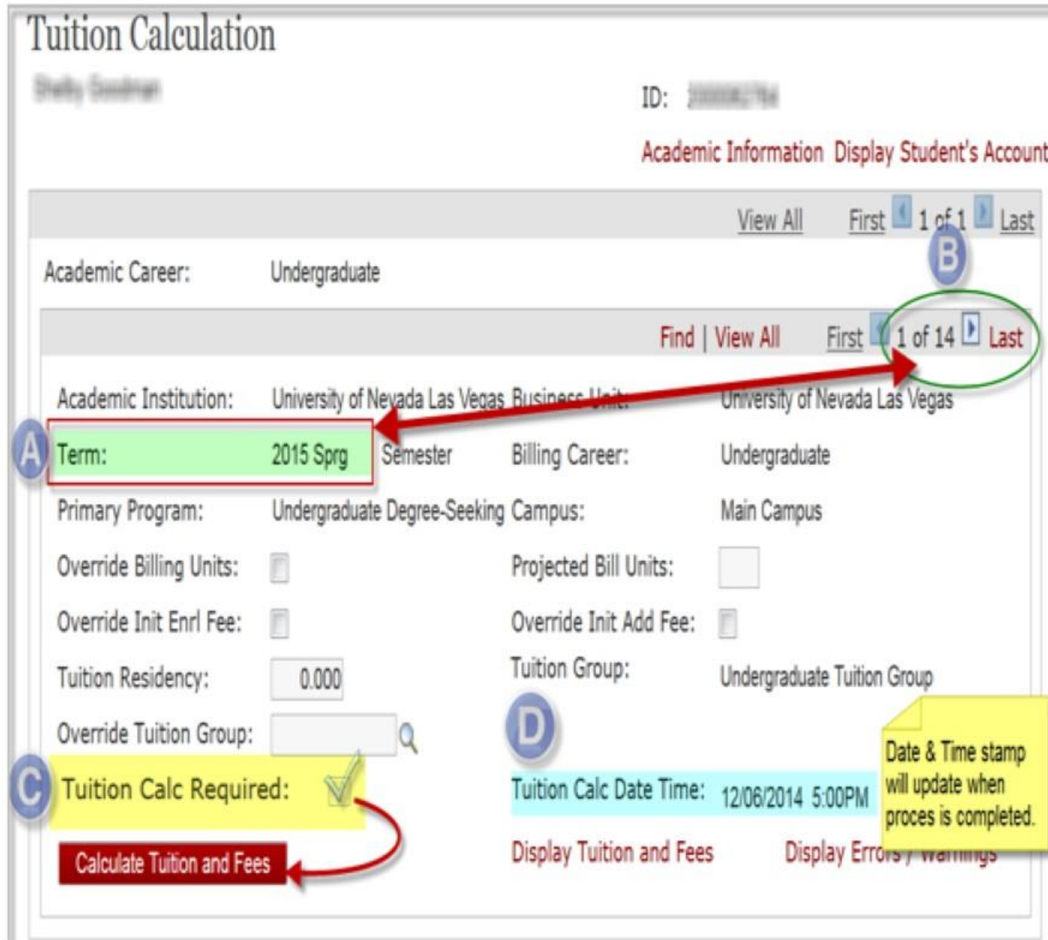
A. Select the Term (s) that requires the Tuition Calculation process.

B. Use the arrow to locate past Terms, if needed.

C. The Tuition Calc Required box will be checked, click the Calculate Tuition and Fees button.

D. Once process is completed, the current date and time displays.

Go to View Customer Accounts page to review results.



Note: Each Term must be tuition calc'd separately if changes are made to past terms.


THANK YOU!