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Flowchart Overview

View Customer Account (Student)

View Current and Past Terms

Academic Information link

Academic Plan link

Enrollment link

Account Details

Item Details:
- Payment Line Details

Receipt Details:
- Student Receipt Details

Go to links...
Detail Trans:
- Item Description

Items by Term link

Item Summary link:
- Item Description
- Item Due Date

Payment Plans:
- Plan Description

Items by Date link

Due Charges link

Anticipated Aid field

- Anticipated Aid link
1.0 View Customer Accounts Overview
The View Customer Accounts page in the Student Financials component, contains detailed financial transactions for every student – for both current and historical Terms, which includes Registration, Mandatory, Course and Special Fees, also Payments, Payment Plans and Third Party Contracts, Refunds and Penalty Fees for Late Registration, Late PPL and Late on Tuition payments. Anticipated Financial Aid is displayed on this page prior to disbursement on students account (link on page displays only prior to disbursing). Also displayed are Waivers, Refund information. Registration Fees are split as Reg I (State) and Reg II (Non State).

1.1 Navigation to View Customer Accounts

NAVIGATION:

Note: Set up User Defaults for Business Unit to autofill.

1. Enter student 10 digit NSHE ID.
2. OR enter Last Name and First Name.
3. Click the Search button-this will take you to the Customer Accounts page.
2.0 Customer Accounts

Verify Name and NSHE ID is displayed on page is correct. If the View All link is highlighted, click on link to expand page. You will find this is consistent with accessing most areas within Customer Accounts.

When a student enrolls, a row is inserted called “Tuition.” If the student enrolls in a Payment Plan, another row is inserted above the Tuition, the balance on the tuition row moves to the Payment Plan row with recalculated installment payments. If late fees are assessed on account those remain on Tuition row.

- Ensure you select the correct Term to review transactions.

This page contains the following links:

- The Academic Information
- Anticipated Aid
- Account Details for current and historical terms

Go To links: These links display financial information in a different formats.
2.1 Account Details

- Click on the Account Details link for Term, ensure you select the Tuition row to view all transactions.

![Account Details Table]

a. ID: This field displays the NSHE ID number and name of student.
b. Business Unit auto fills from Search page.
c. Account Number: Displays the Term you are viewing.
d. Account Balance: This field displays the outstanding balance or credit balance (Refund).
e. Debits: This Field displays the total amount of debits (charges) to the account.
f. Credits: This field displays the total amount of credits (payments) to the account.
g. Applied: This field displays the total amount of payments applied to charges on the account.
h. Unapplied: This field displays the total amount of payments not applied to charges on the account. Use the functionality of Payment Applier or Table Validation to “fix” account.

2.2 Item Details

- Click on the Item Details of any displayed transaction to “drill down.” The Payment Line Details displays what charges were paid by that “code type”
2.3 Payment Line Details
Charges this Payment paid

- Waivers or Payments are set up to pay certain fees.

2.4 Academic Information
Academic Program contains Bio/Demo Data and Career Term Data. The most current Term is listed first.

- Page lists each Term< Career, Residency, number of units enrolled and Level (Freshman, Junior, Senior) and Academic Load (Total Units to date).
2.5 Academic Plan

Academic Plan page displays current and historical Academic Plan and Sub Plan of student.

- Use the arrow to view next page for historical Plans.

2.6 Enrollment Summary

The Enrollment Summary page contains current and historical enrollment-select the Term you want to view from the link on the Academic Information page.

- This page displays status of enrollment for each class Added or Dropped or Withdrawn.
3.0 Go To Links

The Go To links display all financial transactions from Account Details in different formats.

<table>
<thead>
<tr>
<th>Go to:</th>
<th>Detail Trans</th>
<th>Item Summary</th>
<th>Items by Term</th>
<th>Items by Date</th>
<th>Due Charges</th>
<th>Payment Plans</th>
</tr>
</thead>
</table>

a. Detail Trans: Sort by Term

b. Item Summary: Displays transactions-fees, payments and waivers

c. Items by Term: Displays balance of each transaction on account.

d. Items by Date: This page can be sorted by Type or Date range.
e. Due Charges: Displayed are the Due Dates for all Charges and Fees.

- All fees have different due dates - if student is on a Payment Plan the fees would be in installment payments with a due date depending on plan selected. The fees are recalculated in even installments.

f. Payment Plan: Displayed are current and historical Payment Plans and Third Party Contracts - Active or Cancelled.

- When a contract is Cancelled the fees revert back to the Tuition row for Payment Plans.
- A Third Party Contract is a contract created when a Corporation agrees to pay the student’s tuition; all, part or certain fees based on criteria agreed upon. A payment is made on student account. If the contract is Cancelled the student incurs all the fees back on account.
4.0 Anticipated Aid

The Anticipated amount posted on student account is displayed prior to disbursing, the FA will pay Tuition or will be a Refund to the student. Once the FA is disbursed the link to View Anticipated Aid disappears.

4.1 View Anticipated Aid

- The detail page displays what type of FA the student is receiving- Loans, Sub Loans or Scholarships and Stipends.
5.0 Icons on Customer Accounts

Icons found on certain pages throughout MyUNLV are “short cuts” to each main page component. Click on the icon to access.

- The “no smoking” icon is a Negative Service Indicator (notification)
- The “star” icon is a Positive Service Indicator, usually is a notification to prevent a process action.

Note: The Add a New Communication and Checklist icon are not used for individual use. These are applied in Mass.

- The Add a New Comment “bubble” can be accessed to add comment to student account.