VIEW CUSTOMER ACCOUNTS USER GUIDE

STUDENT FINANCIAL TRANSACTIONS

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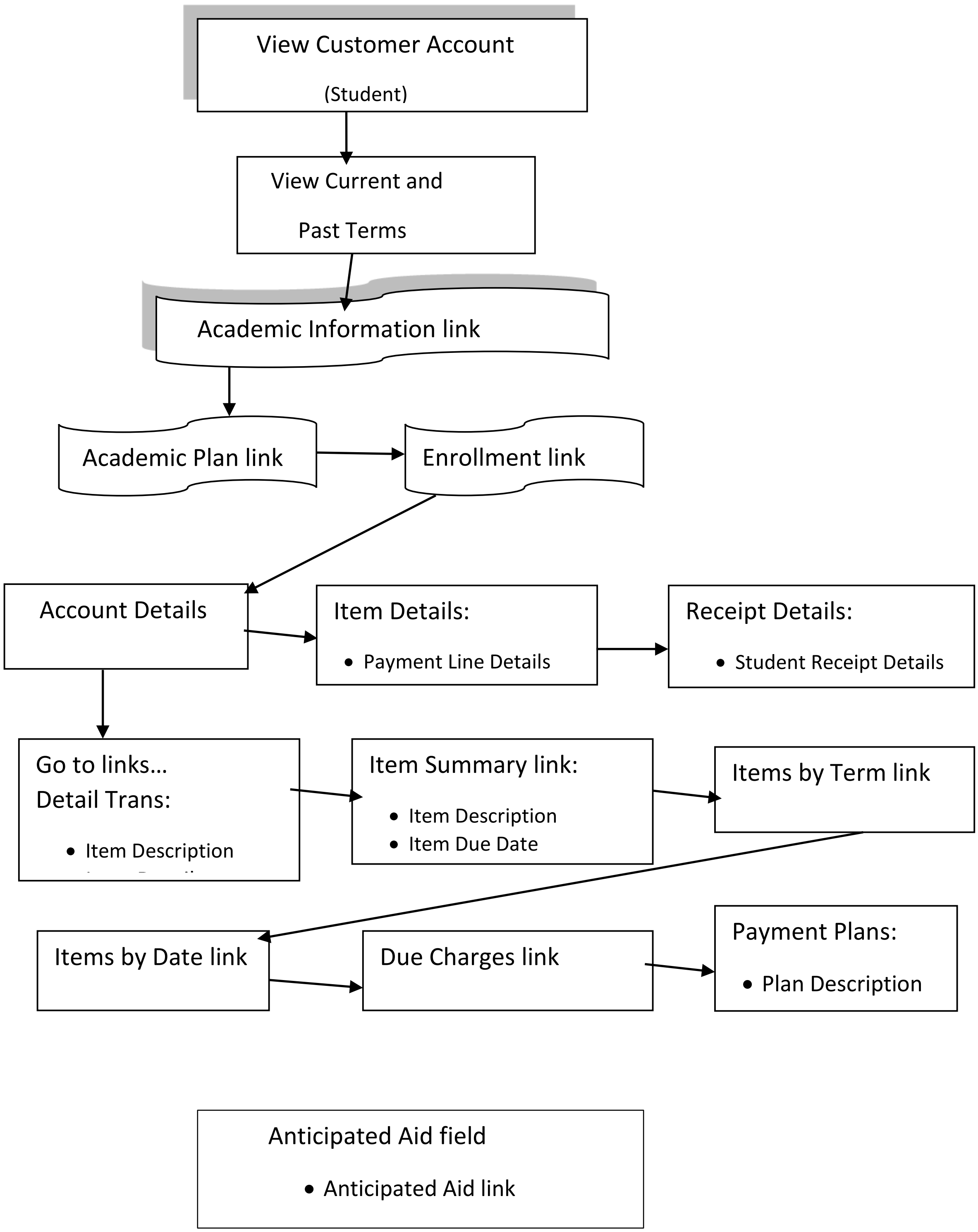
Created for UNLV, University of Nevada, Las Vegas

Contents

Flowchart Overview

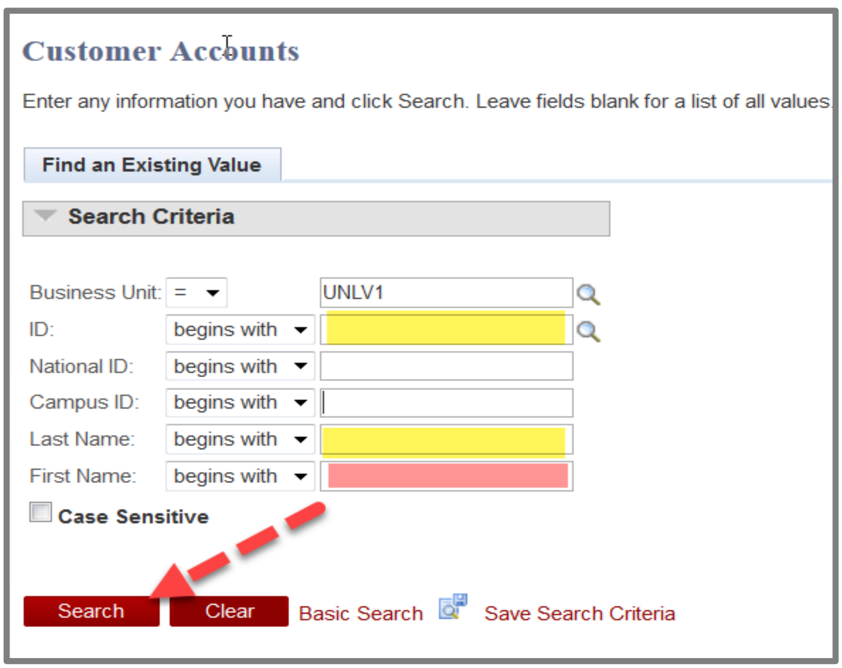


1.0 View Customer Accounts Overview

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:



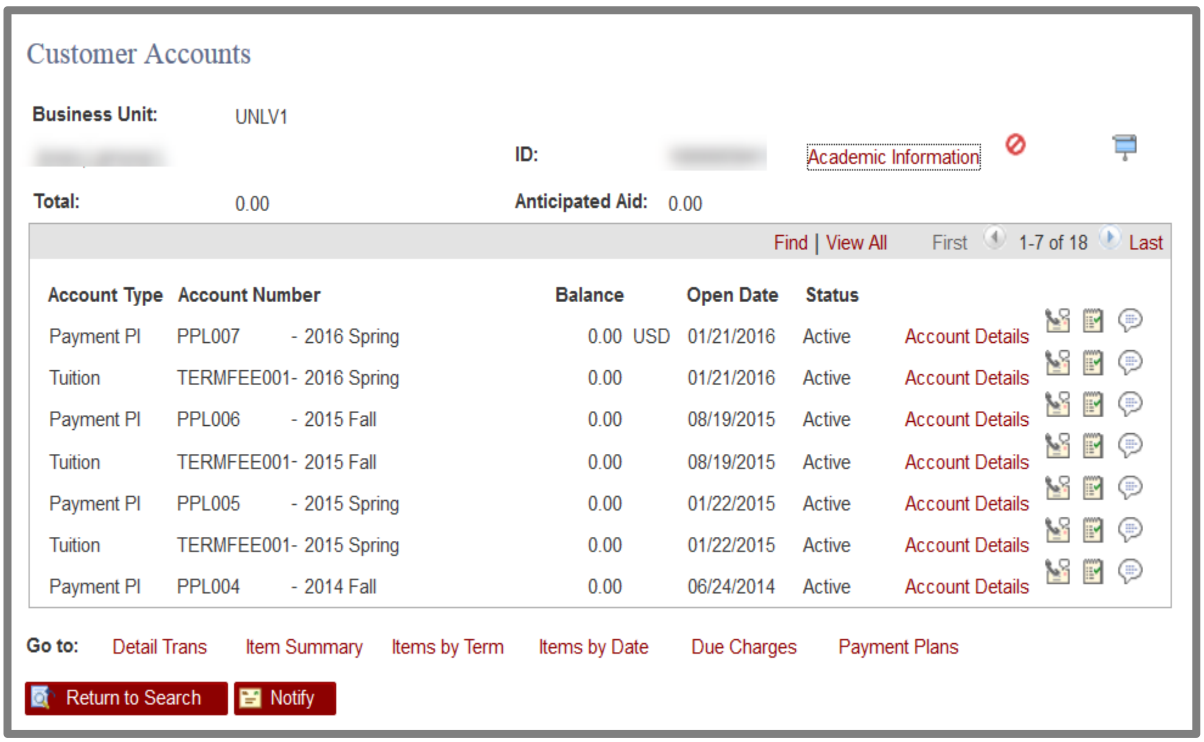
Note: Set up User Defaults for Business Unit to autofill.

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.



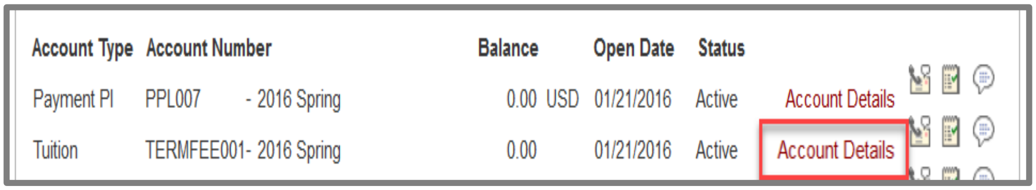
- Ensure you select the correct Term to review transactions.

This page contains the following links:

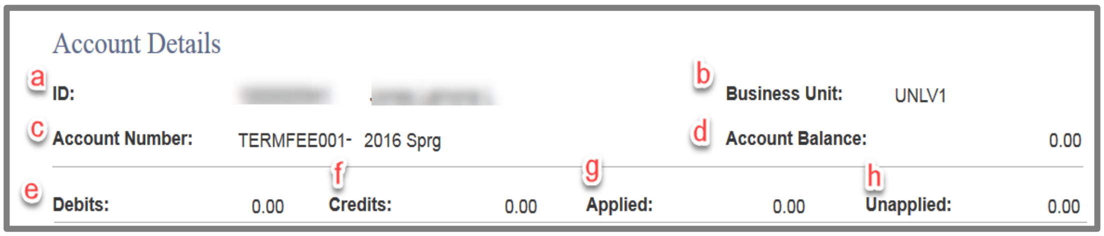
- The Academic Information
- Anticipated Aid
- Account Details for current and historical terms

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

2.1 Account Details

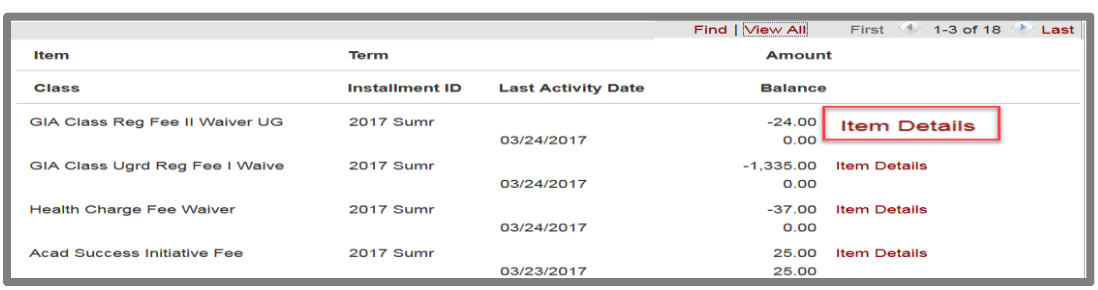


- Click on the Account Details link for Term, ensure you select the Tuition row to view all transactions.



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.

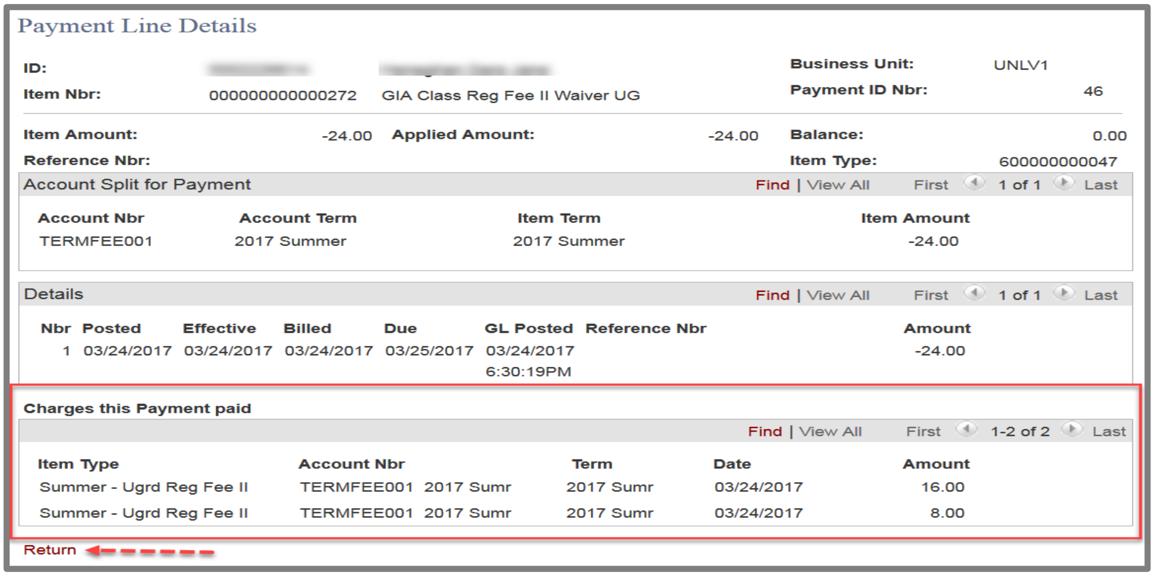
2.2 Item Details



- 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

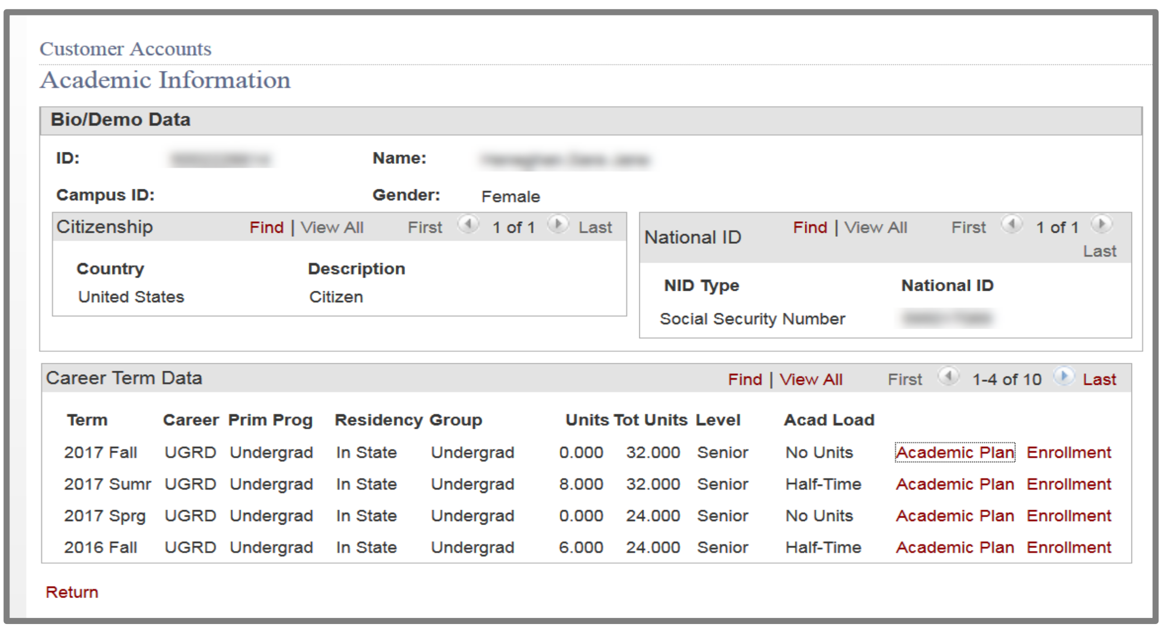
Charges this Payment paid



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

2.4 Academic Information

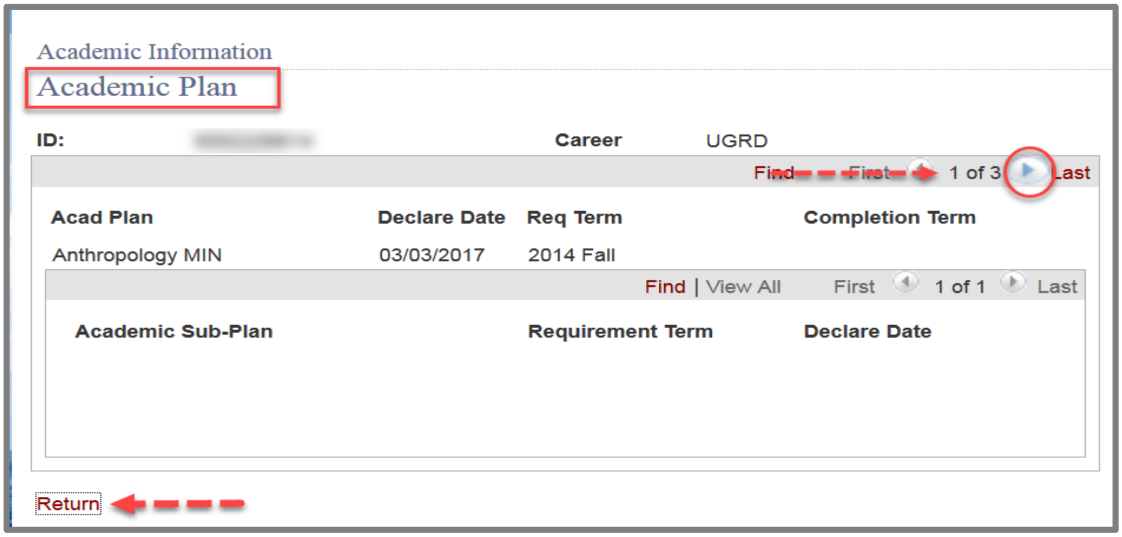
Academic Program contains Bio/Demo Data and Career Tem Data. The most current Term is listed first.



- 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

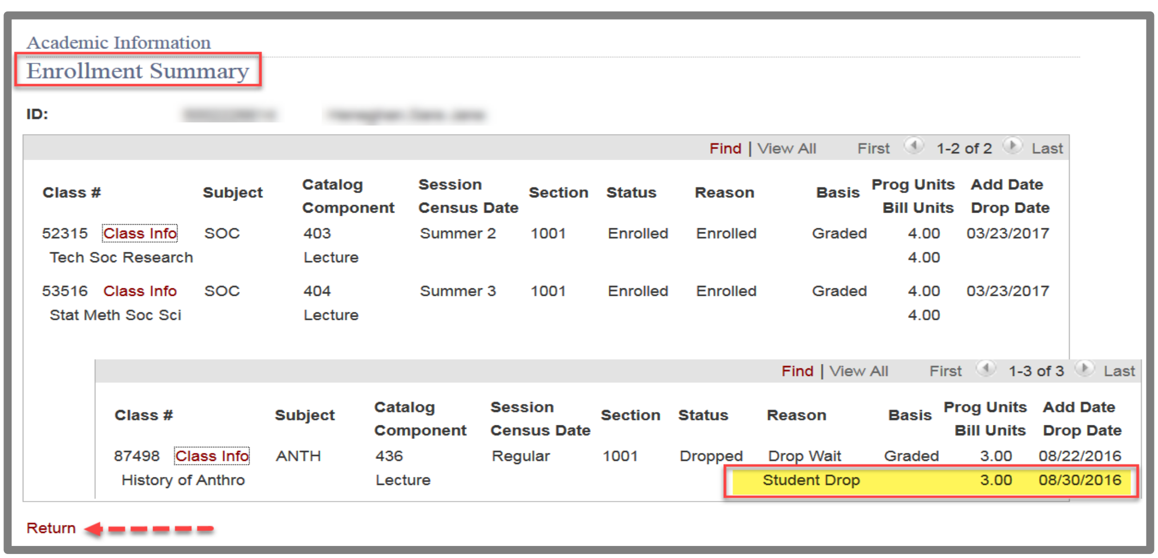
Academic Plan page displays current and historical Academic Plan and Sub Plan of student.



- 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.

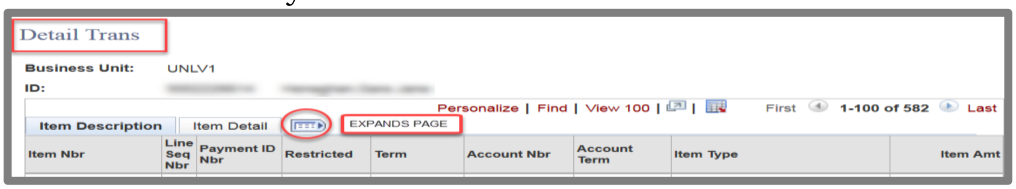


- This page displays status of enrollment for each class Added or Dropped or Withdrawn.

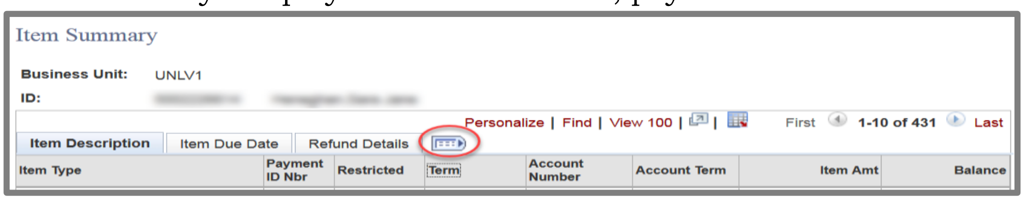
3.0 Go To Links

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

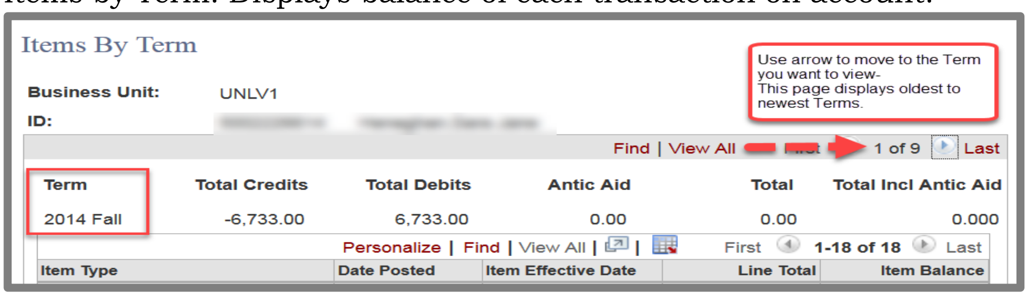
a. Detail Trans: Sort by Term



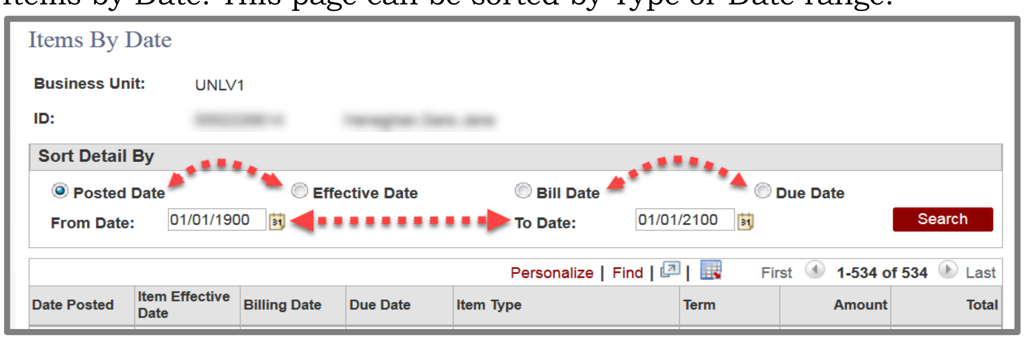
b. Item Summary: Displays transactions-fees, payments and waivers



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.

Due Charges

Business Unit: UNLV1

ID: [redacted]

By Due Date — Find | View 3 — First 1-4 of 4 Last

Due Date	Due Amount	Total Due
01/10/2017	562.18	562.18
05/12/2017	112.00	674.18
06/02/2017	175.88	850.06
07/07/2017	628.88	1,478.94

By Item — Find | View All — First 1-3 of 13 Last

Item Type	Item Term	Account Nbr	Account Term	Due Date	Due Amt	Total Due
Financial Aid Refund	2017 Sprg	TERMFEE001	2017 Sprg	01/10/2017	562.18	562.18
Undergrad Student Services Fee	2017 Sumr	TERMFEE001	2017 Sumr	06/02/2017	4.00	566.18
Undergrad Student Services Fee	2017 Sumr	TERMFEE001	2017 Sumr	07/07/2017	4.00	570.18

Return

- 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.

Payment Plan

Business Unit: UNLV1

ID: [redacted]

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
2168_4PAY_PLAN_13DUE	4 Payment Mid Plan - Fall 2016	Payment Plan	Calculated		Active
2168_VERIZON_WIRELESS	Fall 16 Verizon Wireless	Third Party		SF000000043	Active
2172_VERIZON_WIRELESS	Spring 17 Verizon Wireless	Third Party		SF000000043	Active
2175_VERIZON_WIRELESS	Summer 17 Verizon Wireless	Third Party		SF000000043	Active

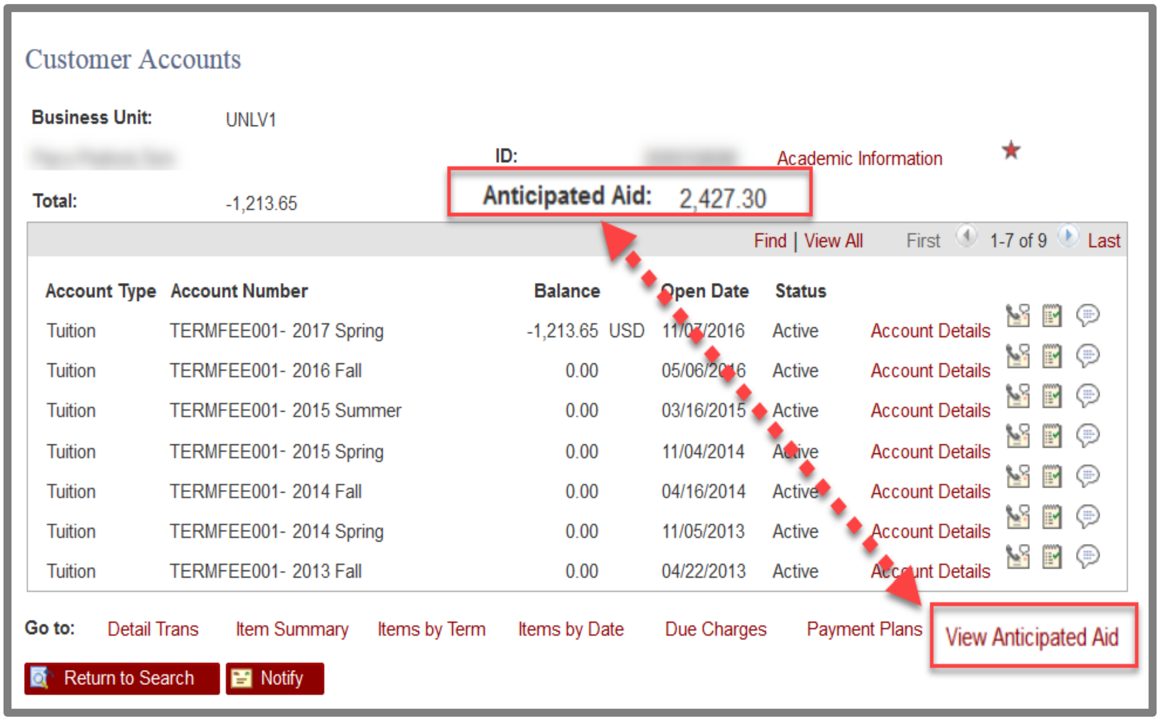
Return

Contract Nbr	Contract Description	Contract Type	Plan Type	External Org ID	Contract Status
2108_4PAY_TMS	Fall 2010 4 Pay TMS PP	Payment Plan	Calculated		Cancelled
2118_3PAY_PLAN	3 Payment Plan - Fall 2011	Payment Plan	Calculated		Cancelled

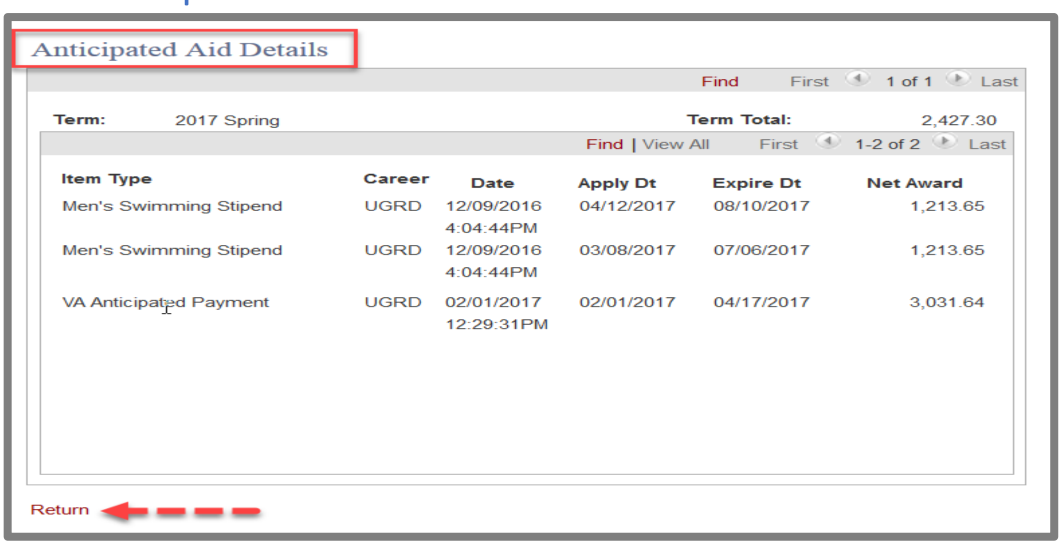
- When a contract is Cancelled the fees revert back to the Tuition row for Payment Plans.
- A Third Party Contract is a contract created when a Corporation agrees to pay the student's tuition; all, part or certain fees based on criteria agreed upon. A payment is made on student account. If the contract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

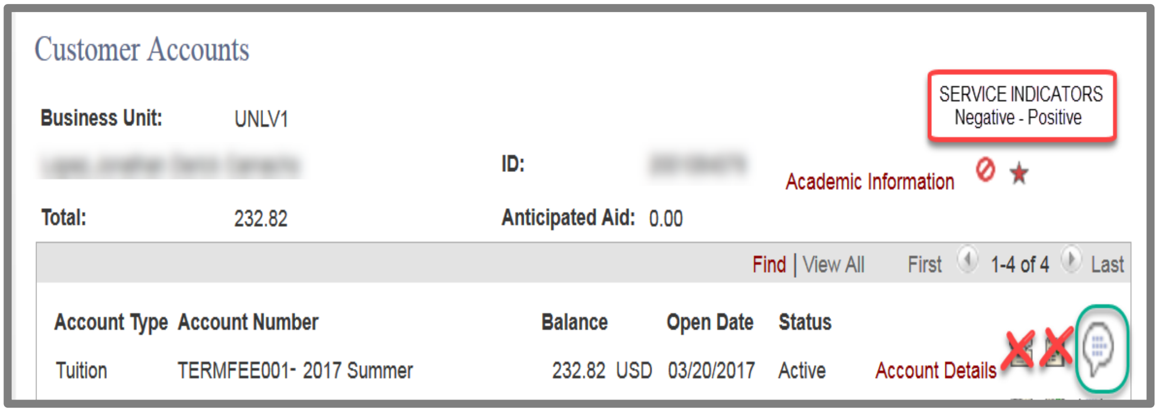


- The detail page displays what type of FA the student is receiving- Loans, Sub Loans or Scholarships and Stipends.

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.