



Student Financials - Inquiry
Customer Account Inquiries

Finance and Accounting
Student Accounts

Table of Contents

Introduction.....	iii
Performing a Customer Account Inquiry.....	1

Introduction

UPK General Information

This course uses a User Productivity Kit (UPK) format. This format uses a choice of playback modes selected from topics in an outline. These playback modes are different methods that you can use to learn about a topic.

Outline Levels

The structured outline upon which this course is built contains three levels.

- **Module** (represented in the outline by a purple book icon) is the highest level.
- **Lessons** (an icon resembling a stack of papers) comprise the second outline level.
- **Topics** (an icon resembling a single sheet of paper) comprise the third outline level.

Use the plus (+) and minus (-) symbols to expand or collapse the levels.

Playback Modes

To begin the course, expand the outline to the topic level. Then, select a topic, which will activate the three playback modes near the top of the screen.

- **See It!** Learn by watching an animated demonstration of the steps needed to perform a task. All activities, such as moving the mouse, will be completed automatically for you.
- **Try It!** Learn interactively in a simulated environment. The system will prompt you with the actions you should perform to complete a task.
- **Do It!** Learn interactively using live data. Test the knowledge you gained from training by completing the task on your own.

Click the icon for the playback mode you selected to launch the UPK Player in a new window. If you need to pause a screen in the See It! mode, click the Pause link in the lower right corner of the text bubble. To resume playback, click the blinking Resume link in the text bubble.

Links

When the instructions in a topic frame say, “Click here,” you must be in either the Try It! mode or the Do It! mode for the link to become active. Links are inactive in the See It! mode.

Jump-in Points

An arrow icon displays to the right of the player modes. Click this icon to open a pop-up window with jump-in points. These points allow you to start a topic at a point other than at the beginning, which is helpful if you need to review a portion of a task.

Concept Pane

The concept pane, which is found at the beginning of the module, lessons, and topics, contains an overview of the particular module, lesson, and topic. Topic concept panes contain additional information about the topic.

Introduction Pane

Each topic’s Introduction pane displays a list of the topic’s objectives.

Exiting the Player

If you need to return to the outline view before the topic's playback concludes, press the ESC key to terminate the player.

At the conclusion of the topic, the UPK Player window will close automatically and return you to the outline. You can then select another topic from the outline or close the window containing the UPK page.

Topics

This module contains the following topic:

- Performing a Customer Account Inquiry

Sandbox

The Student Financials training sandbox is available for you to practice what you have learned. To access the sandbox, navigate to <https://he90dev.net.ucf.edu/psp/HE90TRN/?cmd=login>. When the **Oracle PeopleSoft Enterprise** page opens, you will log in just as you log into the myUCF portal. Enter your PID in the **User ID** field and your PID password in the **Password** field.

Lookup Icon

Whenever you see a lookup icon (represented by a small magnifying glass) next to a field, you can click the icon. You can then select a value from the list of available values that displays.

Menu

You can collapse or expand the menu on the left side of the page while you are using the sandbox.

- To collapse the menu, click the **Minimize Menu** icon (represented by a minus symbol) in the upper right section of the menu bar.
- To expand the menu, click the **Expand Menu** icon in the upper left area of the page.

Performing a Customer Account Inquiry

This topic will teach you how to perform a customer account inquiry to view student account information.

Procedure

In this topic, you will learn how to:

- Perform a search.
- View academic information.
- View account details.
- View payments and charges by detail, summary, and term.
- View and sort items by posted date, effective date, billing date, and due date.
- View due charges, payment plans, and anticipated aid.

Step	Action
1.	Log into the myUCF portal and click the Student Financials link. Student Financials
2.	Navigate to View Customer Accounts . View Customer Accounts
3.	Enter UCF01 in the Business Unit field, if this value did not automatically populate the field. <input type="text" value="UCF01"/>

ORACLE

Home | Logout | Add to Favorites | Sign Out

Help Window | Help

Customer Accounts
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Business Unit: [v] UCF01

ID: [begins with v] []

National ID: [begins with v] []

Campus ID: [begins with v] []

Last Name: [begins with v] []

First Name: [begins with v] []

Case Sensitive




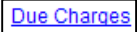



Search Clear Basic Search Save Search Criteria

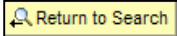
Local Intranet 100%

Step	Action
4.	<p>Enter the student’s employee ID in the ID field or Social Security number in the National ID field.</p> <p>If you need to perform a search, enter the student’s last name in the Last Name field, click the Search button, and select the student from the list that appears.</p> <p>For this example, enter 1234567 in the ID field.</p>
5.	<p>Click the Search button.</p> <p><input type="button" value="Search"/></p>

Step	Action
6.	<p>The Customer Accounts page will display.</p> <p>This page has a number of links that contain additional information. These links include the Academic Information and the Account Details links as well as the seven links listed below.</p> <ul style="list-style-type: none"> • Detail Trans • Item Summary • Items by Term • Items by Date • Due Charges • Payment Plans • View Anticipated Aid
7.	<p>To view additional information for a student, begin by clicking the Academic Information link.</p> <p>Academic Information</p>
8.	<p>Use the Academic Information page that displays to view career term data for the student.</p> <p>To view the student's current academic plan, click the Academic Plan link for the most recent term.</p>
9.	<p>The Academic Plan page will display with information pertaining to the student's academic plan.</p> <p>Click the Return link.</p>
10.	<p>Select a term and click the Enrollment link.</p> <p>For this example, click the Enrollment link for the spring 2009 term.</p> <p>Enrollment</p>
11.	<p>An Enrollment Summary page for the student will display.</p> <p>Click the Return link.</p>
12.	<p>Click the Return link again.</p> <p>Return</p>
13.	<p>Next, select a row and click the Account Details link.</p> <p>For this example, click the Account Details link for the second row, fall 2008 tuition.</p> <p>Account Details</p>

Step	Action
14.	The Account Details page will display. Only the first three most recent items will display for the term you selected. To view all the items for a term, click the View All link.
15.	The page will redisplay to show all the items for the fall 2008 term. If the list is lengthy, use the scroll bar to view all the items. To return to the Customer Accounts page, click the Return link.
16.	Click the first link near the bottom of the page, Detail Trans . Detail Trans
17.	The Detail Trans page that displays contains detailed payments and charges grouped by item number.
18.	Click the Return link. Scroll to the bottom of the page, if necessary. Return
19.	Click the second link, Item Summary . Item Summary
20.	The Item Summary page that displays allows you to view detailed payments grouped by item types, such as the material and supply fee.
21.	Next, click the Item Due Date tab. Item Due Date
22.	The page redisplay to show the due dates for each item.
23.	Click the Return link. Return
24.	Click the third link, Items by Term . Items by Term
25.	This Items by Term page groups and lists items in term order. This example shows items for the fall 2007 term. To view another term, click the Show next row icon.
26.	The page will redisplay with items for the fall 2008 term. You can display another row by clicking the Show next row (Alt+.) icon near the top of the page again or return to the prior row by clicking the Show previous row (Alt+,) icon. For this example, click the Return link to return to the Customer Accounts page.
27.	Click the fourth link, Items by Date . Items by Date

Step	Action
28.	<p>The Items by Date page will display.</p> <p>Use this page to view items by posted date, effective date, billing date, and due date.</p>
29.	<p>You can sort the data by date criteria on the Items by Date page by selecting the appropriate radio button and then clicking the Search button.</p>
30.	<p>In addition, you can provide a date range for your search by inserting a date in the From Date and the To Date fields before clicking the Search button.</p>
31.	<p>You can also select a date by clicking the calendar icon beside either the From Date field or the To Date field.</p> 
32.	<p>When the calendar displays select a date.</p> <p>The calendar will not be used in this example, so close the calendar.</p> 
33.	<p>Click the Return link.</p> <p>Scroll to the bottom of the page, if necessary.</p> 
34.	<p>Click the fifth link, Due Charges.</p> 
35.	<p>The Due Charges page will display.</p> <p>Use this page to view charges currently due by either due date or by item type.</p> <p>Click the Return link.</p>
36.	<p>Click the sixth link, Payment Plans.</p> 
37.	<p>If a payment plan exists (this example has no plan), the Payment Plan page and corresponding Plan Detail tab will contain information about any grants, waivers, or third-party contracts that pertain to the student.</p> <p>Click the Return link.</p> 
38.	<p>Click the last link, View Anticipated Aid.</p> 

Step	Action
39.	<p>The Anticipated Aid Details page will display.</p> <p>Anticipated aid is divided by terms. If the Show next row (Alt+.) icon near the top of the page is highlighted (in this example, the icon is not highlighted), click it to page between terms. To return to the previous row, click the Show previous row (Alt+.) icon.</p> <p>Click the Return link.</p>
40.	<p>To return to the Customer Accounts search page, click the Return to Search button.</p> 
41.	<p>You can either click the Clear button and then enter information on the Customer Accounts page for another search or click the Home link.</p> <p>For this example, click the Home link.</p>
42.	<p>From the home page that displays, either click a menu link or click the Sign out link to terminate your current session.</p>
43.	<p>In this topic, you learned how to:</p> <ul style="list-style-type: none"> • Perform a search. • View academic information. • View account details. • View payments and charges by detail, summary, and term. • View and sort items by posted date, effective date, billing date, and due date. • View due charges, payment plans, and anticipated aid. <p>End of Procedure.</p>