



Student Financials - Inquiry

Finance and Accounting
Student Accounts

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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.

Lessons

This module contains the following lessons:

- **Lesson 1 – Basic Navigation**

- o Navigating in Student Financials

- **Lesson 2 – Customer Account Inquiry**

- o Performing a Customer Account Inquiry

- **Lesson 3 – Group Post Entries**

- o Creating a Group Post Entry
- o Posting a Group Post Entry
- o Viewing Posted Financial Aid Entries

- **Lesson 4 – Service Indicators**

- o Viewing a Service Indicator
- o Adding and Releasing a Service Indicator

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.

Lesson 1 - Basic Navigation

This lesson contains the following topic:

- Topic 1.1 - Navigating in Student Financials

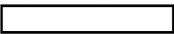
1.1 Navigating in Student Financials

This topic will show you how to navigate in Student Financials as well as acquaint you with the Student Financials menu and page titles and the terminology used in Student Financials.

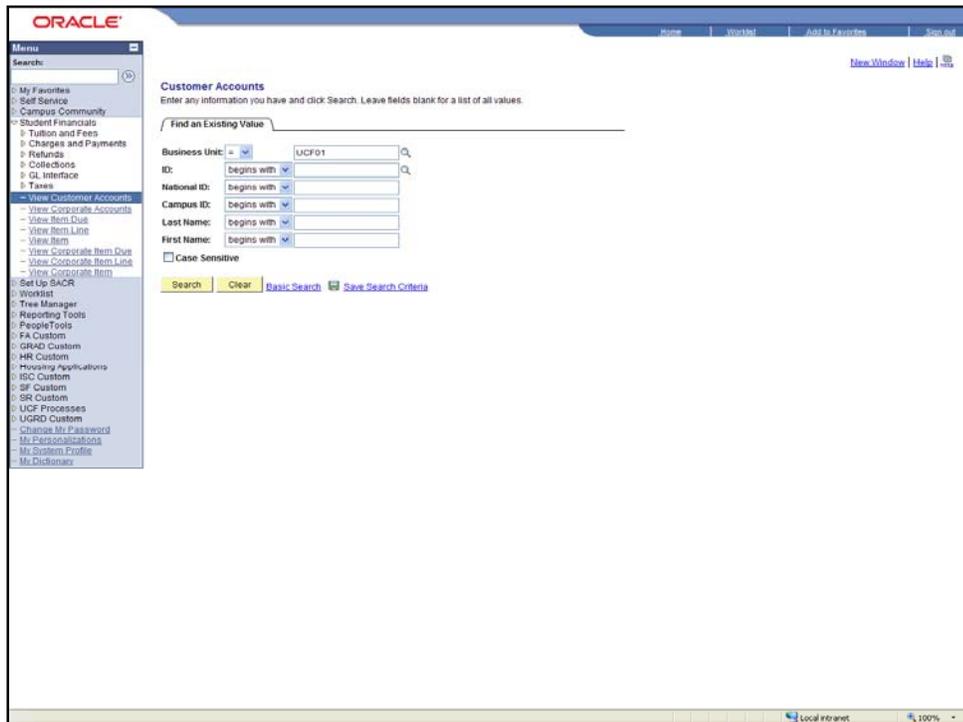
Procedure

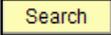
In this topic, you will learn how to:

- Navigate in Student Financials.
- Understand basic navigation terminology.
- Expand and collapse the menu.
- Use the **Home** link.

| Step | Action |
|------|--|
| 1. | You will begin this lesson by learning how to log into Student Financials from the myUCF portal.  |
| 2. | Use your Internet browser to open the myUCF portal page (https://my.ucf.edu). Next, locate the Signon section in the upper left area of the page. |
| 3. | Then, enter your PID and PID Password in the Signon section, and click the Sign On button.  |
| 4. | Notice the submenus on myUCF Menu that displays are collapsed so only the main menu is visible. Triangles indicate menus. Clicking a menu item will open up other menus and links. Links to pages are preceded by a dash (—) and are underlined. Links may appear under a menu item as well as on the home page. Click the Staff Applications link. |

| Step | Action |
|------|--|
| 5. | <p>Click the PeopleSoft SA/HR link.</p> <p>PeopleSoft SA/HR</p> |
| 6. | <p>Student Financials primarily uses two links from the menu that displays, Campus Community and Student Financials.</p> <p>The Campus Community link is used to access Service Indicators, which are discussed in a separate topic.</p> <p>Click the Student Financials link.</p> <p>Campus Community Student Financials</p> |
| 7. | <p>Navigation in Student Financials takes place through menus and links (on the left side of the page) and through folders and page icons (on the right side of the page). Either method or a combination of the two can be used to navigate in Student Financials.</p> <p>The folders and page icons on the right side of the page are often referred to as a navigation collection. This collection allows you to view multiple levels of menu options on a single screen as well as provides you with a brief description of each path option.</p> <p>The terms “menu” and “folder” are interchangeable. The terms “link” and “page” usually refer to both the page and the navigation to the page.</p> |
| 8. | <p>Many link titles include terms that identify the type of task to be performed, such as “View Customer Accounts.”</p> <p>Sometimes page names, such as “Inquire,” “Use,” “Report,” and “Process,” will take the place of navigation menus.</p> <p>Click the View Customer Accounts link.</p> <p>View Customer Accounts</p> |



| Step | Action |
|------|---|
| 9. | <p>When you have fully expanded a menu item, such as the one in this example, a search page will display.</p> <p>You will use the search page to enter your search criteria in the search fields and then press the Search button to display a page with the information you requested.</p> <p>For this example, enter 1234567 in the ID field.</p> |
| 10. | <p>Click the Search button.</p>  |
| 11. | <p>In this example, the Customer Accounts page displays. Use this page to view the information you requested.</p> <p>Notice the main menu on the left side of the page. Throughout your navigation in Student Financials, this menu will always remain docked.</p> <p>In addition, the main menu will display your path history in white so you can easily retrace your steps to and from your current location.</p> |
| 12. | <p>To collapse the main menu so you can more easily view the data on a page, click the Collapse Menu icon.</p>  |

| Step | Action |
|------|--|
| 13. | <p>The main menu will collapse.</p> <p>To expand the collapsed menu, click the Show Menu icon.</p>  |
| 14. | <p>Notice the Home link near the top of the page. This link can be accessed from any page in Student Financials.</p> <p>Clicking this link will immediately return you to the home page and display the main menu.</p> <p>Click the Home link.</p>  |
| 15. | <p>From the home page that displays, you can either click another menu link or click the Sign out link to terminate your current session.</p> |
| 16. | <p>In this topic, you learned how to:</p> <ul style="list-style-type: none">• Navigate in Student Financials.• Understand basic navigation terminology.• Expand and collapse the menu.• Use the Home link. <p>End of Procedure.</p> |

Lesson 2 - Customer Account Inquiries

This lesson contains the following topic:

- Topic 2.1 - Performing a Customer Account Inquiry

2.1 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.  |
| 2. | Navigate to View Customer Accounts .  |
| 3. | Enter UCF01 in the Business Unit field, if this value did not automatically populate the field.  |

| 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> <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 5px;">Search</div> |

| 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. | <p>The Account Details page will display.</p> <p>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.</p> |
| 15. | <p>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.</p> <p>To return to the Customer Accounts page, click the Return link.</p> |
| 16. | <p>Click the first link near the bottom of the page, Detail Trans.</p> <p>Detail Trans</p> |
| 17. | <p>The Detail Trans page that displays contains detailed payments and charges grouped by item number.</p> |
| 18. | <p>Click the Return link.</p> <p>Scroll to the bottom of the page, if necessary.</p> <p>Return</p> |
| 19. | <p>Click the second link, Item Summary.</p> <p>Item Summary</p> |
| 20. | <p>The Item Summary page that displays allows you to view detailed payments grouped by item types, such as the material and supply fee.</p> |
| 21. | <p>Next, click the Item Due Date tab.</p> <p>Item Due Date</p> |
| 22. | <p>The page redisplay to show the due dates for each item.</p> |
| 23. | <p>Click the Return link.</p> <p>Return</p> |
| 24. | <p>Click the third link, Items by Term.</p> <p>Items by Term</p> |
| 25. | <p>This Items by Term page groups and lists items in term order.</p> <p>This example shows items for the fall 2007 term.</p> <p>To view another term, click the Show next row icon.</p> |
| 26. | <p>The page will redisplay with items for the fall 2008 term.</p> <p>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.</p> <p>For this example, click the Return link to return to the Customer Accounts page.</p> |
| 27. | <p>Click the fourth link, Items by Date.</p> <p>Items by Date</p> |

| Step | Action |
|------|--|
| 28. | The Items by Date page will display. Use this page to view items by posted date, effective date, billing date, and due date. |
| 29. | 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. |
| 30. | 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. |
| 31. | You can also select a date by clicking the calendar icon beside either the From Date field or the To Date field.  |
| 32. | When the calendar displays select a date. The calendar will not be used in this example, so close the calendar.  |
| 33. | Click the Return link. Scroll to the bottom of the page, if necessary.  |
| 34. | Click the fifth link, Due Charges .  |
| 35. | The Due Charges page will display. Use this page to view charges currently due by either due date or by item type. Click the Return link. |
| 36. | Click the sixth link, Payment Plans .  |
| 37. | 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. Click the Return link.  |
| 38. | Click the last link, View Anticipated Aid .  |

| 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> |

Lesson 3 - Group Post Entries

This lesson contains the following topics:

- Topic 3.1 - Creating a Group Post Entry
- Topic 3.2 - Posting a Group Post Entry
- Topic 3.3 - Viewing Posted Financial Aid Entries

3.1 Creating a Group Post Entry

This topic will explain the steps needed to create a group post entry.

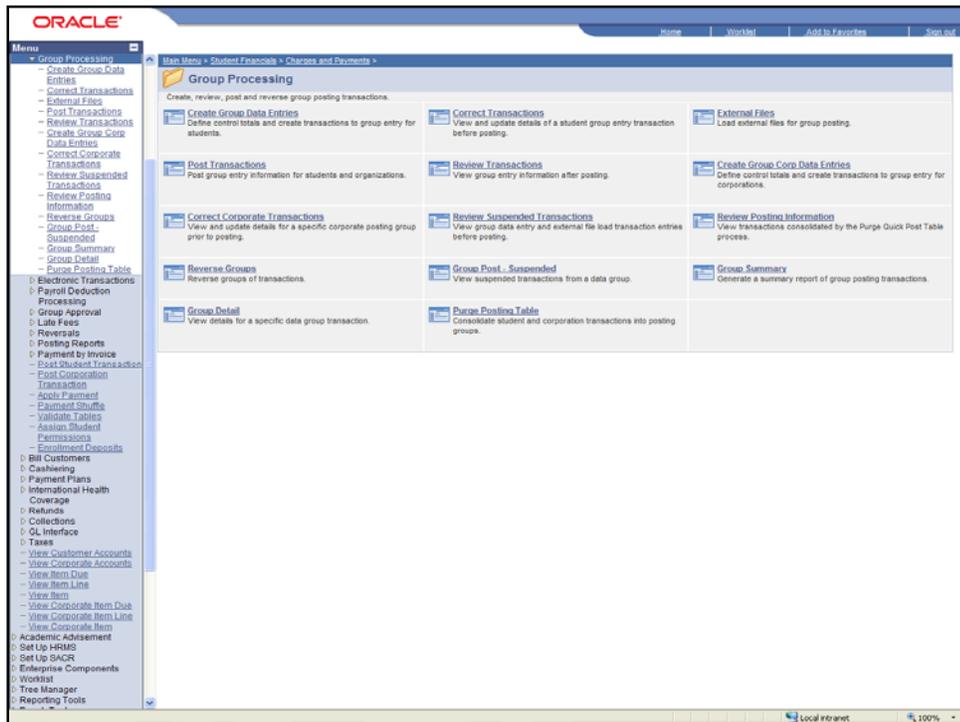
Procedure

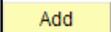
In this topic, you will learn how to:

- Create a group post entry.

| Step | Action |
|------|---|
| 1. | Log into the myUCF portal and navigate to Staff Applications > PeopleSoft SA/HR . |
| 2. | Click the Student Financials link. Student Financials |
| 3. | Next, click the Charges and Payments link. Charges and Payments |

| Step | Action |
|------|--|
| 4. | <p>The available folders in Group Processing will display. Depending on your security level, the folders that display may vary from the ones in this example.</p> <p>Of the folders in this group, the ones listed below are used the most often. This topic will focus on the Create Group Data Entries folder.</p> <ul style="list-style-type: none"> • Create Group Data Entries – Use the links in this folder for charges and credits made to student accounts, such as late fees or payments. • Post Transactions – Use this folder’s links to apply a set of transactions that have been created to a student’s account. • Reverse Groups – Use the links in this folder to create a group for the purpose of reversing an entry that has already been posted. The group number generated when the entry was created is used to post to the reverse group. • Review Transactions – Use these links to view transactions. • Review Suspended Transactions – After the transactions for a group have posted, use the links in this folder to view any unposted transactions. This information is helpful for navigating to a specific location within the group. • External Files – Use these links to convert data from another format, such as data from housing or the health center, and then use the converted data to populate a Group Data Entry. • Create Group Corp Data Entries – Use the links in this folder when conducting business with an entity outside UCF. |

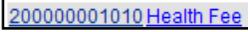


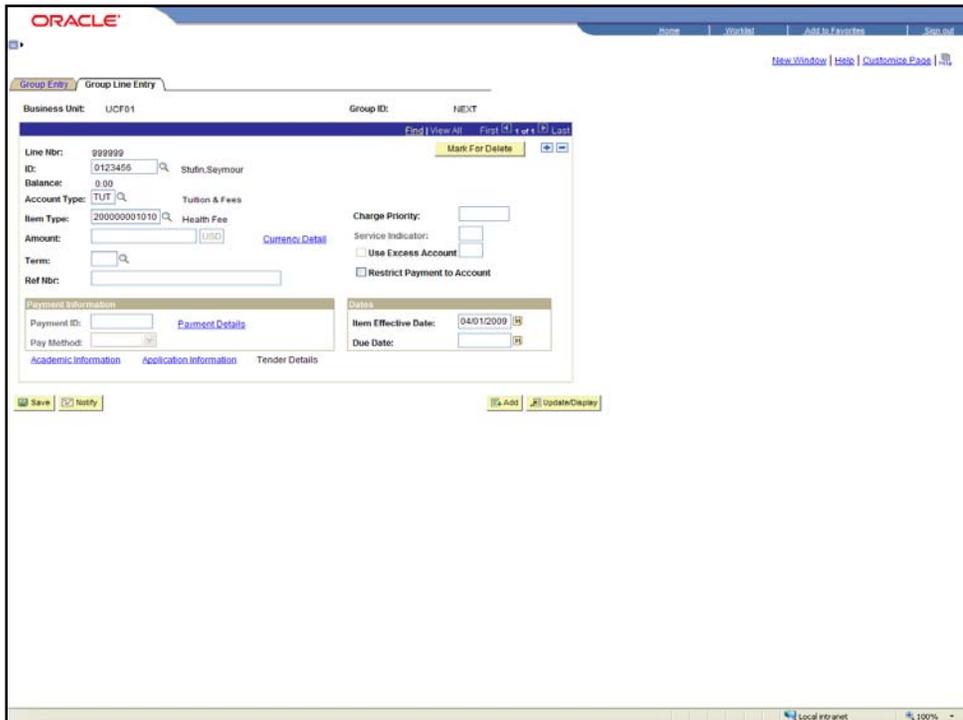
| Step | Action |
|------|---|
| 5. | Click the Create Group Data Entries link.  |
| 6. | The Group Data Entry search page will display. To provide more room on your screen, click the Collapse Menu icon located in the upper left area of your screen.  |
| 7. | Click the Add a New Value tab.  |
| 8. | The Group Data Entry page will display. Do not change any of the values on this page. |
| 9. | Click the Add button.  |

| Step | Action |
|------|--|
| 10. | <p>The Group Data Entry header page will display.</p> <ul style="list-style-type: none"> • First, you will first complete the Group ID and Origin ID fields on this page. • Next, you will click the Group Line Entry tab and complete the fields under that tab. • Then, you will return to the Group Entry tab and complete the Control Totals section. |
| 11. | <p>Begin the first phase of creating your entry process by clicking the down arrow to the right of the Group Type field.</p>  |

The screenshot displays the Oracle Student Financials Group Entry interface. The 'Group Line Entry' tab is selected. The 'Group Type' dropdown menu is open, showing a list of transaction types. The 'Control Totals' section is visible, showing a table with columns for 'Control Total', 'Entered Total', 'Difference', and 'Posted Total'. The 'Posted Total' for 'Non-funded Waivers' is 04/01/2009. The 'Process Status' is 'Not Edit' and the 'Posting Status' is 'Complete'.

| Step | Action |
|------|--|
| 12. | <p>Select an item from the drop-down menu that displays.</p> <p>Financial Aid entries involving short-term loans require specific values be selected. These entries will be discussed in a later topic.</p> <p>For this example, which does not involve a Financial Aid entry for a short-term loan, select Charges.</p>  |
| 13. | <p>The Origin ID field is used to determine the originator of the group.</p> <p>Click the lookup icon beside the Origin ID field.</p>  |
| 14. | <p>Click the Look Up button.</p>  |
| 15. | <p>Select a value from the list that displays.</p> <p>For this example, select Student Accounts.</p>  |
| 16. | <p>After completing the Group Data Entry header page, begin the second phase of creating your entry by clicking the Group Line Entry tab.</p>  |
| 17. | <p>The Group Line Entry tab fields that display are used for entering the transaction data.</p> <p>When you enter the data, to reduce the possibility of making an incorrect entry, do not enter payments and charges in the same group.</p>  |
| 18. | <p>Note the following items pertaining to the Group Line Entry tab fields:</p> <ul style="list-style-type: none"> • Academic Information – This link is used to view information about the student’s enrollment, such as enrollment dates and current status. • Charge Priority – This field is used for certain charges and certain terms. For example, the FAALLTIV code is used for payments and indicates a payment should be applied to all items that Financial Aid allows to be paid. • Restrict Payment to Account – This box is selected when the payment needs to be restricted to a specified account, such as Abandoned Property. |
| 19. | <p>Enter the student’s seven-digit ID in the ID field, or click the lookup icon and select the ID from the list that displays.</p> <p>For this example, enter 0123456.</p> |

| Step | Action |
|------|---|
| 20. | The student's name will populate beside his or her name in the ID field. Notice the Account Type and Item Type fields. The values entered in these fields should complement each other and should not conflict. |
| 21. | Click the lookup icon beside the Account Type field.  |
| 22. | Click the Look Up button.  |
| 23. | Select a value from the list that displays. For this example, select TUT - Tuition & Fees .  |
| 24. | Click the lookup icon beside the Item Type field.  |
| 25. | Click the Look Up button.  |
| 26. | Select an item from the list that displays. For this example, select 200000001010 - Health Fee .  |



The screenshot displays the Oracle Student Financials 'Group Line Entry' form. The form is titled 'Group Line Entry' and shows the following details:

- Business Unit:** UCF01
- Group ID:** NEXT
- Line Nbr:** 999999
- ID:** 0123456 (Student: Stufin, Seymour)
- Balance:** 0.00
- Account Type:** TUT (Tuition & Fees)
- Item Type:** 200000001010 (Health Fee)
- Amount:** (Empty)
- Term:** (Empty)
- Ref Nbr:** (Empty)
- Charge Priority:** (Empty)
- Service Indicator:** (Empty)
- Use Excess Account:** (Unchecked)
- Restrict Payment to Account:** (Unchecked)
- Payment Information:**
 - Payment ID: (Empty)
 - Pay Method: (Empty)
- Dates:**
 - Item Effective Date: 04/01/2009
 - Due Date: (Empty)

Buttons at the bottom include 'Save', 'Notify', 'Add', and 'Update/Display'.

| Step | Action |
|------|---|
| 27. | Enter an amount in the Amount field. For this example, enter 25.00 . |
| 28. | Click the Term field lookup icon.  |
| 29. | Click the Look Up button.  |
| 30. | Payments will be applied according to the value entered in the Term field. Select a term from the list that displays. For this example, select 1350 – Spring 2009 .  |
| 31. | The optional Due Date field is used to specify when payment for a charge is due; for example, a date 14 days from a charge. Click the calendar icon in the Due Date field.  |
| 32. | Select a date from the calendar that displays. For this example, select April 3.  |
| 33. | Finish the second phase of your posting by clicking the Save button.  |
| 34. | As soon as you press the Save button, the Group ID field will display a Group ID number. Record this number, as you will use it later.  |
| 35. | To begin the third phase of creating your entry, click the Group Entry tab.  |
| 36. | In this phase, you will complete three items in the Control Totals section, the Balance Group selection and the amount and quantity Control Total fields. |
| 37. | Before you begin, however, notice that the Entered Total field displays negative values. After you complete your entries in the Control Totals section, these fields will both display 0. |

| Step | Action |
|------|--|
| 38. | <p>First, select the box for Balance Group.</p> <p>When this box is selected, the Deposit Balance field will show “Balanced” when the entry is posted, if the items balance.</p> <p>In this example, no entries have been made and the posting status is incomplete, so the field displays "Not Balanced."</p> |
| 39. | <p>Second, enter an amount in the Control Total field. The amount you enter should match the amount in the Entered Total field.</p> <p>For this example, enter 25.00.</p> |
| 40. | <p>Notice that the Difference field now displays 0.00 instead of -25.00.</p>  |
| 41. | <p>Third, enter the amount of data records. Like the Control Total field, this amount should match the amount shown in the Entered Total field.</p> <p>For this example, since one item was entered, enter the number 1.</p> |
| 42. | <p>Finish by clicking the Save button.</p>  |
| 43. | <p>Notice that the Difference field now displays 0.</p>  |
| 44. | <p>Click the Home link.</p>  |
| 45. | <p>Choose an option from the main menu, or click the Sign out link to terminate your session.</p> |
| 46. | <p>In this topic, you learned how to:</p> <ul style="list-style-type: none"> • Create a group post entry. <p>End of Procedure.</p> |

3.2 Posting a Group Post Entry

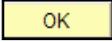
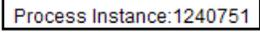
This topic will explain the steps needed to post a group post entry and how to confirm that the entry balanced.

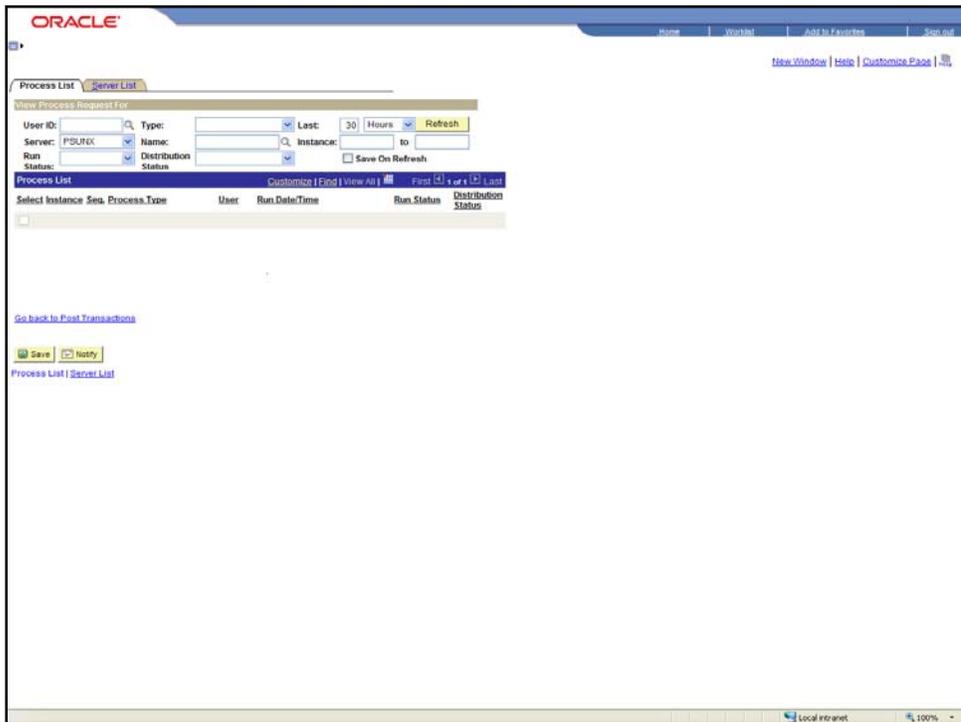
Procedure

In this topic, you will learn how to:

- Post a group post entry.
- Confirm that the posted entry balanced.

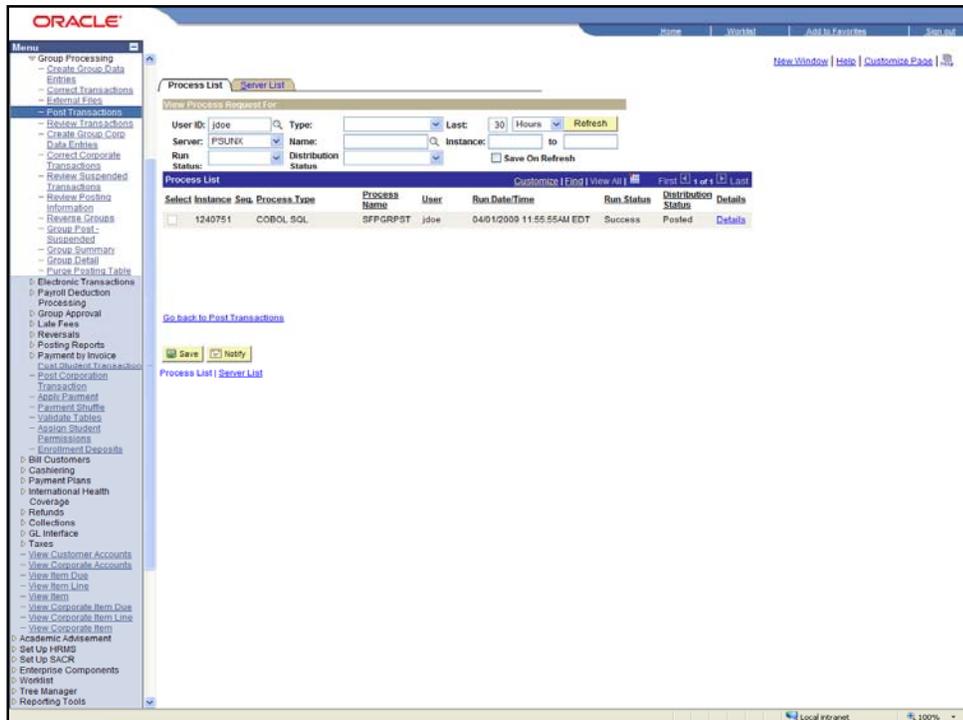
| Step | Action | | | | |
|--------------------|--|--------------------|-----------------|------------------|-----------------|
| 1. | Log into the myUCF portal and navigate to Staff Applications > PeopleSoft SA/HR . | | | | |
| 2. | Click the Student Financials link. Student Financials | | | | |
| 3. | Next, click the Charges and Payments link. Charges and Payments | | | | |
| 4. | Then, select Group Processing > Post Transactions . Post Transactions | | | | |
| 5. | <p>The Post Transactions page will display.</p> <p>To begin the process of posting an entry, you will need a Run Control.</p> <p>If you do not have a Run Control:</p> <ul style="list-style-type: none"> • First, click the Add a New Value tab. • Second, enter a name for your Run Control in the Run Control ID field. Choose a name carefully, because the system will not allow you to change or delete the name after it is saved. Run Control IDs are case-sensitive and should be entered without using spaces. • Last, click the Add button. <p>If you have already created a Run Control, on the Post Transactions search page that displays, click the Search button.</p> <input type="button" value="Search"/> | | | | |
| 6. | <p>Select a Run Control ID from the list that displays.</p> <p>For this example, select SA_GROUP_POST.</p> SA_GROUP_POST | | | | |
| 7. | <p>On the Post Transactions page that displays, substitute the Group ID number, which you recorded earlier, for the number that appears in the Starting Group ID and Ending Group ID fields.</p> <p>For this example, substitute 000000000053253 for 000000000041673 in both of these two fields.</p> <table border="1"> <tr> <td>Starting Group ID:</td> <td>000000000041673</td> </tr> <tr> <td>Ending Group ID:</td> <td>000000000041673</td> </tr> </table> | Starting Group ID: | 000000000041673 | Ending Group ID: | 000000000041673 |
| Starting Group ID: | 000000000041673 | | | | |
| Ending Group ID: | 000000000041673 | | | | |
| 8. | After entering the Group ID number in the Starting and Ending fields, click the Run button. | | | | |
| 9. | <p>On the Process Scheduler Request page that displays, select the Group Posting Process box.</p> <input type="checkbox"/> | | | | |

| Step | Action |
|------|--|
| 10. | Click the OK button.  |
| 11. | The Post Transactions page will display with a Process Instance number.  |
| 12. | Click the Process Monitor link.  |



| Step | Action |
|------|---|
| 13. | Enter your User ID in the User ID field. For this example, enter jdoue . |
| 14. | Click the Refresh button.  |
| 15. | The screen will redisplay to show the process information. If your process ran successfully, the Run Status field will display Success .  |

| Step | Action |
|------|---|
| 16. | In the next phase, you will confirm that your posted entry balanced. Click the Expand Menu icon.  |



| Step | Action |
|------|---|
| 17. | The main menu will redisplay. Click the Create Group Data Entries link.  |
| 18. | The Group Data Entry search page will display. Click the Collapse Menu icon to collapse the menu.  |
| 19. | Enter the Group ID , which you recorded earlier, in the Group ID field and then click the Search button. |

| Step | Action |
|------|---|
| 20. | The Group Entry tab fields will display. Notice the Deposit Balance and Posting Status fields now both display “Balanced.” |
| 21. | If an error had occurred during the posting process, the Process Instance field would display a number. For this example, the process ran without errors, so no number displays. <div style="border: 1px solid black; padding: 2px; display: inline-block;"> Process Instance: <input style="width: 50px; height: 15px;" type="text"/> </div> |
| 22. | Click the Home link. <div style="border: 1px solid black; padding: 2px; display: inline-block; background-color: #4a7ebb; color: white;">Home</div> |
| 23. | Choose an option from the main menu, or click the Sign out link to terminate your session. |
| 24. | In this topic, you learned how to: <ul style="list-style-type: none"> • Post a group post entry. • Confirm that the posted entry balanced. End of Procedure. |

3.3 Viewing Posted Financial Aid Entries

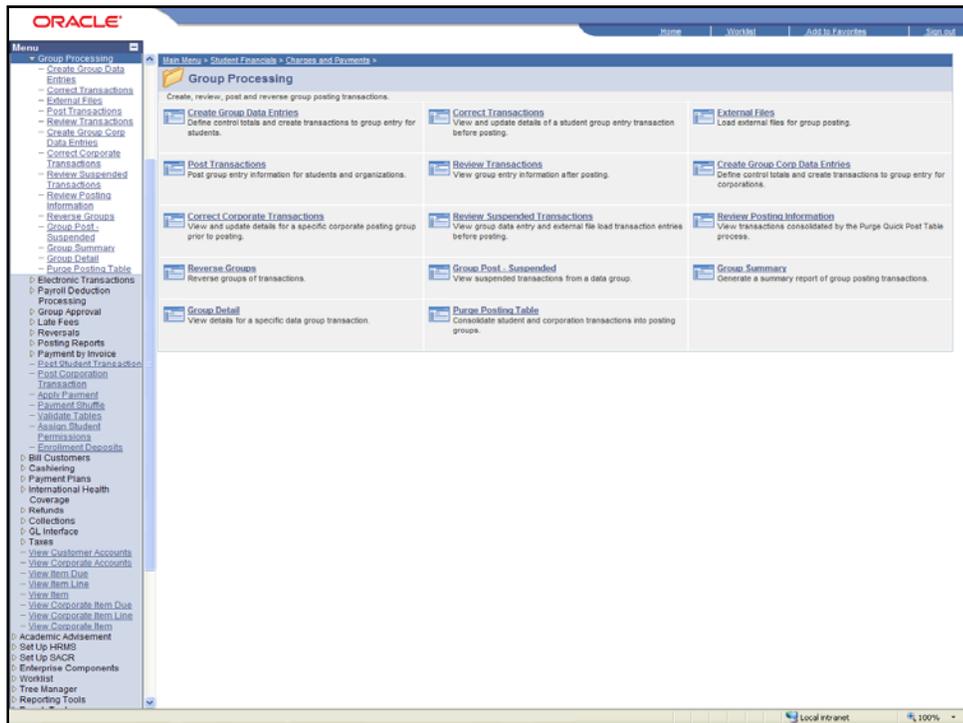
Financial aid entries for short-term loans have specific requirements. Distinct values must be entered in designated fields. This topic will teach you how to view a financial aid entry and complete the required fields for this type of entry.

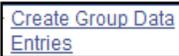
Procedure

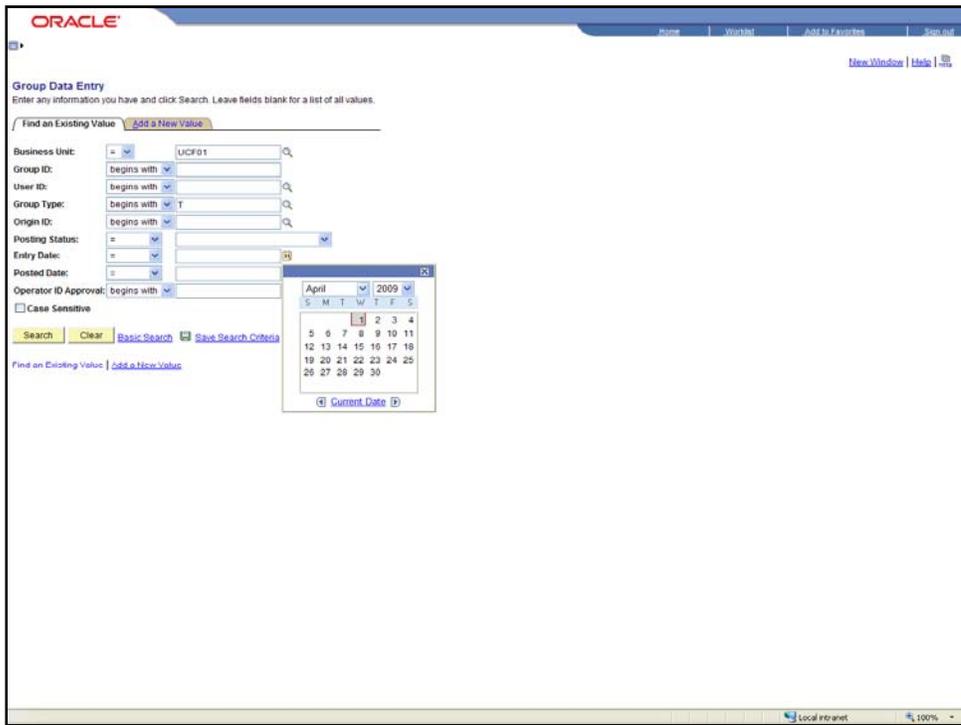
In this topic, you will learn how to:

- View a posted financial aid entry for a short-term loan.
- Complete the required fields for this type of entry.

| Step | Action |
|------|---|
| 1. | Log into the myUCF portal and navigate to Staff Applications > PeopleSoft SA/HR . |
| 2. | Click the Student Financials link. <div style="border: 1px solid black; padding: 2px; display: inline-block; background-color: #4a7ebb; color: white;">Student Financials</div> |
| 3. | Next, click the Charges and Payments link. <div style="border: 1px solid black; padding: 2px; display: inline-block; background-color: #4a7ebb; color: white;">Charges and Payments</div> |



| Step | Action |
|------|---|
| 4. | Then, click the Create Group Data Entries link.  |
| 5. | The Group Data Entry search page will display. To provide more room on your screen, click the Collapse Menu icon located in the upper left area of your screen.  |
| 6. | On the Group Data Entry search page that displays, click the Group Type lookup icon.  |
| 7. | Click the Look Up button.  |
| 8. | Select Short-Term Loan Credits from the Look Up Group Type list.  |
| 9. | The letter T will populate the Group Type field. Click the Entry Date field calendar icon. |



| Step | Action |
|------|--|
| 10. | Select a date from the calendar that displays. For this example, click the down arrow beside the month.  |
| 11. | Select a month from the list that displays and then select a day.  |
| 12. | The date you selected will populate in the Entry Date field. Click the down arrow beside the Entry Date field.  |

| Step | Action |
|------|--|
| 13. | <p>As you may have noticed, many search pages contain operator fields. These fields contain a list of drop-down predefined values, which help define a specific range or value and work in conjunction with a value that you specify.</p> <p>The drop-down list that displays contains the following operators:</p> <ul style="list-style-type: none"> • = (equal to the specified value) • not = (not equal to the specified value) • < (less than the specified value) • <= (less than or equal to the specified value) • > (greater than the specified value) • >= (greater than or equal to the specified value) • between (falls between the specified range of values) • in (value appears in a list of items) <p>For this example, select the > operator (greater than the specified value).</p>  |
| 14. | <p>Click the Search button.</p>  |
| 15. | <p>Select a Group ID from the list that displays.</p> <p>For this example, select 000000000052629.</p>  |
| 16. | <p>The Group Entry tab fields will display.</p> <p>When financial aid entries for short-term loans are created, the Group Entry tab fields listed below must always contain these values:</p> <ul style="list-style-type: none"> • Group Type: Short-Term Loan Credit (an advance) • Origin ID: 00015 – Short-Term Loans  |
| 17. | <p>Click the Group Line Entry tab.</p>  |

| Step | Action |
|------|---|
| 18. | <p>The Group Line Entry tab fields will display.</p> <p>When a Financial Aid entry for a short-term loan is created, the fields below must be completed as follows:</p> <ul style="list-style-type: none"> • Account Type: STL • Item Type: 271000002010 • Charge Priority: STLREFND. This code designates that the payment is to be applied to the short-term loan account. |
| 19. | <p>When the entry is made, the Amount, Term, and Due Date fields must also be completed.</p> <p>The Ref Nbr field in this example contains the FINA code. This code, which is frequently used in this field, indicates how the short-term loan will be paid back.</p> |
| 20. | <p>Click the Home link.</p> <p>Home</p> |
| 21. | <p>Choose an option from the main menu, or click the Sign out link to terminate your session.</p> |
| 22. | <p>In this topic, you learned how to:</p> <ul style="list-style-type: none"> • View a posted financial aid entry for a short-term loan. • Complete the required fields for this type of entry. <p>End of Procedure.</p> |

Lesson 4 - Service Indicators

Service Indicators indicate that a student’s financial record contains information that impacts the student. Two types of service indicators exist, negative and positive.

- **Negative Service Indicator** – signals that a student’s financial record contains information that is detrimental to the student. Negative Service Indicators, which are commonly referred to as “holds,” prevent services from occurring. For example, a student with a negative Service Indicator for an unpaid library fine may be unable to register for classes or to have his or her grades or transcripts released.

- **Positive Service Indicator** – signals that a student’s financial record contains information that is beneficial to the student. For example, a positive Service Indicator may show the user that a late fee has been waived for a student.

Service Indicators can be released from a student’s record based on criteria, such as the Service Indicator Code, Reason, Term, and Date value. A record of the Service Indicator's existence will continue in the Audit record.

This lesson contains the following topics:

- Topic 4.1 – Viewing a Service Indicator
- Topic 4.2 – Adding or Releasing a Service Indicator

4.1 Viewing a Service Indicator

In this topic, you will learn how to perform a search and view a service indicator.

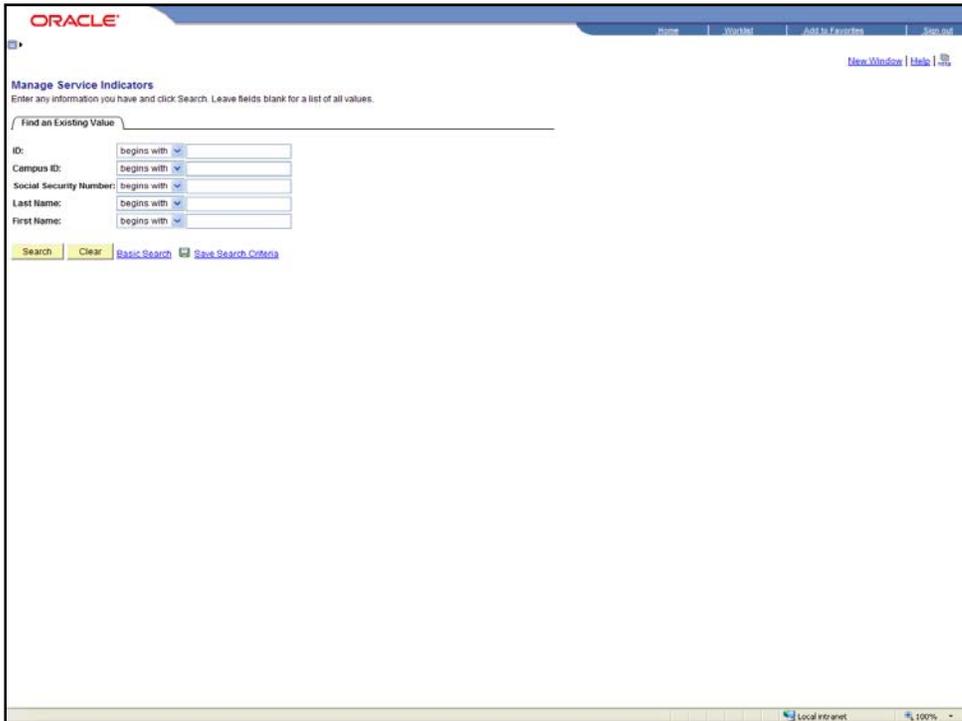
Procedure

In this topic you will learn how to:

- Perform a search for a service indicator.
- View a service indicator.

| Step | Action |
|------|--|
| 1. | Log into the myUCF portal and navigate to Staff Applications > PeopleSoft SA/HR. |
| 2. | Next, navigate to Campus Community > Service Indicators > Person. Person |
| 3. | Then, click the Manage Service Indicators link. Manage Service Indicators |

| Step | Action |
|------|--|
| 4. | To provide more room on your screen, click the Collapse Menu icon located in the upper left area of your screen.  |



The screenshot shows the Oracle Manage Service Indicators page. At the top, there's a navigation bar with 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. Below that, the page title 'Manage Service Indicators' is displayed. A search section is visible with the heading 'Find an Existing Value'. It contains five search criteria: ID, Campus ID, Social Security Number, Last Name, and First Name. Each criterion has a text input field and a 'begins with' dropdown menu. Below the search fields are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. The page also includes a 'New Window' and 'Help' link in the top right corner.

| Step | Action |
|------|--|
| 5. | On the Manage Service Indicators page that displays, enter your search criteria in one or more of the search fields. You can enter a portion of the search criteria, click the Search button, and then select a student from the list of search results that display. For this example, enter 1234567 in the ID field. |
| 6. | Click the Search button.  |
| 7. | The Manage Service Indicators page will redisplay with the name and ID of the student who met your search criteria. Information pertaining to any service indicators posted to a student's account can be viewed in the Service Indicator Summary . |

| Step | Action |
|------|--|
| 8. | <p>To view more detailed information about a service indicator, click its link in the Code column.</p> <p>PRK</p> |
| 9. | <p>The View Service Indicator page will display.</p> <p>In addition to showing the Service Indicator Code and the Service Indicator Reason Code, which indicates why the service indicator was placed on the student's record, this page contains a detailed description of the service indicator.</p> |
| 10. | <p>The Effect field on the View Service Indicator page indicates if the Service Indicator is positive or negative.</p> <p>The page also displays the Effective Period, which includes the starting and ending periods for the Service Indicator; Assignment Details, such as the department associated with the Service Indicator and the amount; Contact Information; and Comments, if any.</p> |
| 11. | <p>The Services Impacted section at the bottom of the View Service Indicator page lists any services affected by the service indicator, such as a block on registration or a hold on releasing the student's grades or transcript.</p> <p>Among the information included in this section is the date and time the service indicator was posted to the student's record as well as the User ID and name of the employee who posted the service indicator.</p> |
| 12. | <p>To view additional information on the service indicator, click one of the links under the Impact column.</p> <p>For this example, click the AENR link.</p> <p>AENR</p> |
| 13. | <p>After viewing the information on the Service Impact Description page that displays, click the Return button.</p> <p></p> |
| 14. | <p>On the View Service Indicator page that displays, click the Cancel button.</p> <p></p> |
| 15. | <p>The Manage Service Indicators page will display.</p> <p>Click the Home link near the top of the page to return to the main menu.</p> <p>Home</p> |
| 16. | <p>From the home page that displays, either click a menu link or click the Sign out link to terminate your current session.</p> |

| Step | Action |
|------|---|
| 17. | <p>In this topic you learned how to:</p> <ul style="list-style-type: none"> • Perform a search for a service indicator. • View a service indicator. <p>End of Procedure.</p> |

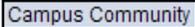
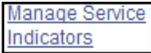
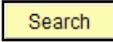
4.2 Adding and Releasing a Service Indicator

In this topic, you will learn how to add and release a service indicator.

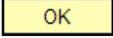
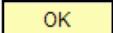
Procedure

In this topic, you will learn how to:

- Add a service indicator.
- Release a service indicator.

| Step | Action |
|------|--|
| 1. | <p>After logging into the myUCF portal, navigate to Staff Applications > PeopleSoft SA/HR, and then click the Campus Community link.</p>  |
| 2. | <p>Next, navigate to Service Indicators > Person.</p>  |
| 3. | <p>Then, click the Manage Service Indicators link.</p>  |
| 4. | <p>The Manage Service Indicators search page will display.</p> <p>Enter a value in one or more of the search fields.</p> <p>For this example, enter 1234567 in the ID field.</p> |
| 5. | <p>Click the Search button.</p>  |
| 6. | <p>The Manage Service Indicators page will display for the student you selected.</p> <p>To provide more room on your screen, click the Collapse Menu icon located in the upper left area of your screen.</p>  |
| 7. | <p>To begin the process of adding a service indicator, click the Add Service Indicator link.</p>  |

| Step | Action |
|------|--|
| 8. | <p>The Add Service Indicator page will display.</p> <p>The Start Date and Placed Person ID fields will automatically populate.</p> <p>Click the Service Indicator Code lookup icon.</p> |
| 9. | <p>The Look Up Service Indicator Code page will display with a list of service indicators.</p> <p>The list may vary from the one displayed in this example, as the list will contain only the service indicators that you are authorized to add.</p> <p>For this example, select SFR – Student Accounts Review from the list.</p> <p>SFR</p> |
| 10. | <p>The Add Service Indicator page will redisplay with the value you selected populating the Service Indicator Code field.</p> <p>Depending on the service code you select, corresponding values will automatically populate in the following fields:</p> <ul style="list-style-type: none"> • Service Ind Reason Code • Description • Department • Services Impacted |
| 11. | <p>Click the Start Term lookup icon.</p> <p></p> |
| 12. | <p>Click the Look Up button.</p> <p></p> |
| 13. | <p>Select a term from the list that displays.</p> <p>For this example, select 1350 – Spring 2009.</p> <p>1350 Spring 2009</p> |

| Step | Action |
|------|--|
| 14. | Enter an optional comment in the Comment field. For this example, enter Charges pending . |
| 15. | Click the OK button.  |
| 16. | The Manage Service Indicators page will redisplay with the service indicator you just added. Next, you will learn how to release a service indicator. To begin the process of releasing a service indicator, click its code link. For this example, click SFR .  |
| 17. | The Edit Service Indicator page will display. Click the Release button.  |
| 18. | Respond to the confirmation message that displays by clicking the OK button.  |

| Step | Action |
|-------------|--|
| 19. | <p>The Manage Service Indicators page that displays will no longer show the service indicator you just released.</p> <p>Click the Home link near the top of the page to return to the main menu.</p>  |
| 20. | <p>From the home page that displays, either click a menu link or click the Sign out link to terminate your current session.</p> |
| 21. | <p>In this topic, you learned how to:</p> <ul style="list-style-type: none">• Add a service indicator.• Release a service indicator. <p>End of Procedure.</p> |