

Student Financials - Inquiry

Finance and Accounting Student Accounts

# Table of Contents

Introductioni	iv
Lesson 1 - Basic Navigation	1
1.1 Navigating in Student Financials	1
Lesson 2 - Customer Account Inquiries	
2.1 Performing a Customer Account Inquiry	5
Lesson 3 - Group Post Entries 1	.1
3.1 Creating a Group Post Entry1	1
3.2 Posting a Group Post Entry 1	8
3.3 Viewing Posted Financial Aid Entries	22
Lesson 4 - Service Indicators 2	7
4.1 Viewing a Service Indicator	27
4.2 Adding and Releasing a Service Indicator	30

# 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

- 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 <b>myUCF</b> portal page (https://my.ucf.edu). Next, locate the <b>Signon</b> section in the upper left area of the page.
3.	Then, enter your <b>PID</b> and <b>PID Password</b> in the <b>Signon</b> section, and click the <b>Sign On</b> button.
4.	<ul> <li>Notice the submenus on myUCF Menu that displays are collapsed so only the main menu is visible.</li> <li>Triangles indicate menus. Clicking a menu item will open up other menus and links.</li> <li>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.</li> <li>Click the Staff Applications link.</li> </ul>

Step	Action
5.	Click the <b>PeopleSoft SA/HR</b> link.           PeopleSoft SA/HR
6.	Student Financials primarily uses two links from the menu that displays, <b>Campus Community</b> and <b>Student Financials</b> .
	The <b>Campus Community</b> link is used to access Service Indicators, which are discussed in a separate topic.
	Click the <b>Student Financials</b> link. Campus Community <u>Student Financials</u>
7.	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.
	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.
	The terms "menu" and "folder" are interchangeable. The terms "link" and "page" usually refer to both the page and the navigation to the page.
8.	Many link titles include terms that identify the type of task to be performed, such as "View Customer Accounts."
	Sometimes page names, such as "Inquire," "Use," "Report," and "Process," will take the place of navigation menus.
	Click the <b>View Customer Accounts</b> link.

		.tione	Add to Favorites
-			New Window   He
			Deve songov   He
Customer Accounts	e and click Search. Leave fields blank for a list of all values.		
mmunity			
find an Existing Value			
Business Unit: = V	UCF01 Q		
s ID: begins with	× Q		
National ID: begins with	*		
orner Accounts Campus ID: begins with	*		
Due Last Name: begins with	~		
Line First Name: begins with	~		
orate Item Due orate Item Line			
orate item			
Search Clear Ba	iic Search 📓 Save Search Oriteria		
er			
alla			
L.			
m			
lications			
e5			
505 IM			
ses m Jassword Zafons			
ses m assword			
ses en asseurd Zalbons roffe			
ses en asseurd zations rofie			
ses en asseurd Zalbons roffe			
ses en asseurd Zalbons roffe			
ses en asseurd Zalbons roffe			

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

Step	Action
13.	The main menu will collapse.
	To expand the collapsed menu, click the <b>Show Menu</b> icon.
14.	Notice the <b>Home</b> link near the top of the page. This link can be accessed from any page in Student Financials.
	Clicking this link will immediately return you to the home page and display the main menu.
	Click the <b>Home</b> link.
15.	From the home page that displays, you can either click another menu link or click the <b>Sign out</b> link to terminate your current session.
16.	In this topic, you learned how to:
	• Navigate in Student Financials.
	• Understand basic navigation terminology.
	• Expand and collapse the menu.
	• Use the <b>Home</b> link. <b>End of Procedure.</b>

## **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

- 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 <b>Student Financials</b> link.
2.	Navigate to View Customer Accounts.         View Customer Accounts
3.	Enter <b>UCF01</b> in the <b>Business Unit</b> field, if this value did not automatically populate the field.

ORA									
•								New Window	
ustomer A	ecounts								Sector Friday
		and click Search. L	eave fields bla	nk for a list of all	values.				
Find an Exis	ting Value								
usiness Unit		UCF01	9						
	begins with		a						
ational ID:	begins with								
impus ID:	begins with 💌								
ast Name:	begins with 🐱								
rst Name:	begins with 🐱								
Case Sens	ittive								

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

Step	Action
6.	The <b>Customer Accounts</b> page will display.
	This page has a number of links that contain additional information. These links include the <b>Academic Information</b> and the <b>Account Details</b> links as well as the seven links listed below.
	• Detail Trans
	• Item Summary
	• Items by Term
	• Items by Date
	• Due Charges
	• Payment Plans
	View Anticipated Aid
7.	To view additional information for a student, begin by clicking the <b>Academic</b> <b>Information</b> link. <u>Academic Information</u>
8.	Use the <b>Academic Information</b> page that displays to view career term data for the student.
	To view the student's current academic plan, click the <b>Academic Plan</b> link for the most recent term.
9.	The <b>Academic Plan</b> page will display with information pertaining to the student's academic plan.
	Click the <b>Return</b> link.
10.	Select a term and click the <b>Enrollment</b> link.
	For this example, click the <b>Enrollment</b> link for the <b>spring 2009</b> term.
11.	An <b>Enrollment Summary</b> page for the student will display.
	Click the <b>Return</b> link.
12.	Click the <b>Return</b> link again.
13.	Next, select a row and click the Account Details link.
	For this example, click the <b>Account Details</b> link for the second row, <b>fall 2008</b> tuition.
	Account Details

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

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 <b>Items by Date</b> page by selecting the appropriate radio button and then clicking the <b>Search</b> button.
30.	In addition, you can provide a date range for your search by inserting a date in the <b>From Date</b> and the <b>To Date</b> fields before clicking the <b>Search</b> button.
31.	You can also select a date by clicking the calendar icon beside either the <b>From</b> <b>Date</b> field or the <b>To Date</b> 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 <b>Return</b> link.
	Scroll to the bottom of the page, if necessary.
34.	Click the fifth link, <b>Due Charges</b> .
35.	The <b>Due Charges</b> page will display.
	Use this page to view charges currently due by either due date or by item type.
	Click the <b>Return</b> link.
36.	Click the sixth link, <b>Payment Plans</b> . Payment Plans
37.	If a payment plan exists (this example has no plan), the <b>Payment Plan</b> page and corresponding <b>Plan Detail</b> tab will contain information about any grants, waivers, or third-party contracts that pertain to the student.
	Click the <b>Return</b> link.
38.	Click the last link, <b>View Anticipated Aid</b> . View Anticipated Aid

Step	Action
39.	The Anticipated Aid Details page will display.
	Anticipated aid is divided by terms. If the <b>Show next row</b> (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 <b>Show previous row</b> (Alt+,) icon.
	Click the <b>Return</b> link.
40.	To return to the <b>Customer Accounts</b> search page, click the <b>Return to Search</b> button.
41.	You can either click the <b>Clear</b> button and then enter information on the <b>Customer</b> <b>Accounts</b> page for another search or click the <b>Home</b> link.
	For this example, click the <b>Home</b> link.
42.	From the home page that displays, either click a menu link or click the <b>Sign out</b> link to terminate your current session.
43.	In this topic, you learned 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. <b>End of Procedure.</b>

# **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 <b>Staff Applications</b> > <b>PeopleSoft SA/HR</b> .
2.	Click the <b>Student Financials</b> link. <u>Student Financials</u>
3.	Next, click the <b>Charges and Payments</b> link. Charges and Payments

# Training Guide Student Financials – Inquiry

Step	Action
4.	The available folders in <b>Group Processing</b> will display. Depending on your security level, the folders that display may vary from the ones in this example.
	Of the folders in this group, the ones listed below are used the most often. This topic will focus on the <b>Create Group Data Entries</b> folder.
	• Create Group Data Entries – Use the links in this folder for charges and credits made to student accounts, such as late fees or payments.
	• <b>Post Transactions</b> – Use this folder's links to apply a set of transactions that have been created to a student's account.
	• <b>Reverse Groups</b> – 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.
	• <b>Review Suspended Transactions</b> – 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.

Note:       Anthe       Addit / face/disc       Addit / face/dis       Addit / face/disc	ORACLE.			
Const Processing     Const Constant     Constant     Constant     Const Constant     Co			Home	Worklist Add to Favorites Sign ou
Entriest   Statist Disarchine   Performed Forestand Disarchine	<ul> <li>Group Processing</li> </ul>	Main Menu > Student Financials > Charges and Payments >		
<ul> <li>Construction and the second second</li></ul>		C Group Processing		
<ul> <li>exist account of the sector of</li></ul>	- Correct Transactions	V		
<ul> <li>         Original future devices         Data Endown         Down         Do</li></ul>	<ul> <li>Post Transactions</li> </ul>	Create Group Data Entries	Correct Transactions	External Files
Instantion	- Create Group Corp Data Entries	Define control totals and create transactions to group entry for		Load external files for group posting.
Internation         Reverse Science         Besting Algoon         Besting Algoon         Cound Data         Cound Data         Description	Transactions - Review Suspended Transactions	Post Transactions Post group entry information for students and organizations.	Review Transactions View group entry information after posting.	Define control totals and create transactions to group entry for
- Organ Post, Bacancelos	- Review Posting Information			
- Decar Postion Take       ■ Porton Postion Take       ■ Concernation Take       ■ Concental       ■ Concernation Take	<ul> <li>Group Post_ Suspended</li> <li>Group Summary</li> </ul>		View group data entry and external file load transaction entries	View transactions consolidated by the Purge Quick Post Table
<ul> <li>Considerational product of the specific data group transaction.</li> <li>Considerational components transactions with posting group.</li> <li>Personal product of the specific data group transaction.</li> <li>Considerational components transactions with posting group.</li> <li>Personal product of the specific data group transaction.</li> <li>Personal product of the specific data group transaction.<th>Purge Posting Table     Electronic Transactions     Payroll Deduction</th><th>Reverse Groups of transactions.</th><th></th><th></th></li></ul>	Purge Posting Table     Electronic Transactions     Payroll Deduction	Reverse Groups of transactions.		
- Descriptions     - Descri	D Group Approval D Late Fees D Reversals D Posting Reports	Group Detail View details for a specific data group transaction.	Consolidate student and corporation transactions into posting	
	Pest Diskinst Transaken     Pest Diskinst Transaken			
Reporting Tools	<ul> <li>Tree Manager</li> <li>Reporting Tools</li> </ul>			

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

Step	Action
10.	The Group Data Entry header page will display.
	• First, you will first complete the Group ID and Origin ID fields on this page.
	• Next, you will click the <b>Group Line Entry</b> tab and complete the fields under that tab.
	• Then, you will return to the <b>Group Entry</b> tab and complete the <b>Control Totals</b> section.
11.	Begin the first phase of creating your entry process by clicking the down arrow to the right of the <b>Group Type</b> field.

								stomize Page
roup Entry G	roup Line Entry						LIST. COLORER   LISTS   SA	COLUMNIC JORS   MI
roup Entry L	COD Line Entry							
Business Unit:	UCF01		Group ID:	NEXT				
Group Type:			*Accounting	g Date: 04/01/2009				
Drigin ID:	Cashier Office Receip Charge Reversals		"Received:	04/01/2009				
Original Group ID	Charges Deferments	2	"Entry Date:	04/01/2009 📴				
utrai Totals	Financial Aid Florida Prepaid Progra		Operator:	jdoe				
Balance Group:	Health Services Housing External File		Assign To:					
Control Total:	Late Payment Fees Legacy Financial Aid	USD	0 Display Opt					
intered Total:	Library Services Lock Box External File		0 Range in D	0:	to			
ofference:	Mail Payments		0 Display: 0 Total in DB		to [14] [44] [34]			
Posted Total:	Non-Funded Walvers Payment Reversals	04/01/2009	0 Total in DB	<u></u>				
ective Status	Payments Quick Post Transactio	der anne en	100000000000000000000000000000000000000		- A A A A A A A A A A A A A A A A A A A			
dit Status:	Short-Term Loan Cha	sting Action:	Posting Status:		Process Instance:			
	Short Term Loan Cred	Indiately for Dealing 1991	Contraction of the second s					
NotEdit	Short-Term Loan Cred Short-Term Loan Feet	Sailable for Postion	Complete					
	Short-Term Loan Cree Short-Term Loan Feet UCF Dookstore Write-Offs	Sailable for Postion	Complete	E	Add 🖉 Update/Display			
	Short-Term Loan Cree Short-Term Loan Feet UCF Dookstore	Sailable for Postion	Complete	E	Add JE Update/Display			
	Short-Term Loan Cree Short-Term Loan Feet UCF Dookstore Write-Offs	Sailable for Postion	Complete	E	a Add 🗾 Update/Display			
	Short-Term Loan Cree Short-Term Loan Feet UCF Dookstore Write-Offs	Sailable for Postion	Complete		• Add J Update/Display			
	Short-Term Loan Cree Short-Term Loan Feet UCF Dookstore Write-Offs	Sailable for Postion	Complete	1	Add 🔊 Update/Display			
	Short-Term Loan Cree Short-Term Loan Feet UCF Dookstore Write-Offs	Sailable for Postion	Complete	- <u>B</u>	Add JE Update/Display			
	Short-Term Loan Cree Short-Term Loan Feet UCF Dookstore Write-Offs	Sailable for Postion	Complete	1	Add JE Update/Display			
	Short-Term Loan Cree Short-Term Loan Feet UCF Dookstore Write-Offs	Sailable for Postion	Complete	1	, Add ∦UpdateOisplay			
	Short-Term Loan Cree Short-Term Loan Feet UCF Dookstore Write-Offs	Sailable for Postion	Complete	1	Add <u>All</u> Update/Display			
	Short-Term Loan Cree Short-Term Loan Feet UCF Dookstore Write-Offs	Sailable for Postion	Complete	1	Add <u>#</u> UpdateOisplay			
	Short-Term Loan Cree Short-Term Loan Feet UCF Dookstore Write-Offs	Sailable for Postion	Complete	2	Add <u>E</u> Update/Deplay			
	Short-Term Loan Cree Short-Term Loan Feet UCF Dookstore Write-Offs	Sailable for Postion	Complete	1	Add <u>E</u> UpdateOeplay			
	Short-Term Loan Cree Short-Term Loan Feet UCF Dookstore Write-Offs	Sailable for Postion	Complete	2	Add <u>P</u> lupsenGepley			
	Short-Term Loan Cree Short-Term Loan Feet UCF Dookstore Write-Offs	Sailable for Postion	Complete	. 2	Add ElliptenDisplay			
	Short-Term Loan Cree Short-Term Loan Feet UCF Dookstore Write-Offs	Sailable for Postion	Complete	. 2	Add ElupternOlepley			
	Short-Term Loan Cree Short-Term Loan Feet UCF Dookstore Write-Offs	Sailable for Postion	Complete	2	Add <u>B</u> lupsenGeyey			

Step	Action
12.	Select an item from the drop-down menu that displays.
	Financial Aid entries involving short-term loans require specific values be selected. These entries will be discussed in a later topic.
	For this example, which does not involve a Financial Aid entry for a short-term loan, select <b>Charges</b> .
13.	The <b>Origin ID</b> field is used to determine the originator of the group.
	Click the lookup icon beside the <b>Origin ID</b> field.
14.	Click the <b>Look Up</b> button.
15.	Select a value from the list that displays.
	For this example, select <b>Student Accounts</b> .
16.	After completing the <b>Group Data Entry</b> header page, begin the second phase of creating your entry by clicking the <b>Group Line Entry</b> tab.
17.	The <b>Group Line Entry</b> tab fields that display are used for entering the transaction data.
	When you enter the data, to reduce the possibility of making an incorrect entry, do <b>not</b> enter payments and charges in the same group.
18.	Note the following items pertaining to the Group Line Entry tab fields:
	• Academic Information – This link is used to view information about the student's enrollment, such as enrollment dates and current status.
	• <b>Charge Priority</b> – 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.
	• <b>Restrict Payment to Account</b> – This box is selected when the payment needs to be restricted to a specified account, such as Abandoned Property.
19.	Enter the student's seven-digit ID in the <b>ID</b> field, or click the lookup icon and select the ID from the list that displays.
	For this example, enter <b>0123456</b> .

Step	Action
20.	The student's name will populate beside his or her name in the <b>ID</b> field.
	Notice the <b>Account Type</b> and <b>Item Type</b> fields. The values entered in these fields should complement each other and should not conflict.
21.	Click the lookup icon beside the <b>Account Type</b> field.
22.	Click the <b>Look Up</b> button.
23.	Select a value from the list that displays.
	For this example, select <b>TUT</b> - <b>Tuition &amp; Fees</b> .
24.	Click the lookup icon beside the <b>Item Type</b> field.
25.	Click the <b>Look Up</b> button.
26.	Select an item from the list that displays.
	For this example, select <b>20000001010 - Health Fee</b> .

up Entry (C	Group Line Entry							New Window   Hele   C	ustomice Page
iness Unit	UCF01			Group ID:	NEXT				
				Endly	igw All First 🕘 a or a 🕑	Last			
lance: count Type:	20000001010 Q	Stufin.Seymour Tution & Fees Health Fee	Currency Detail	Charge Priority: Service Indicator: Use Excess Acc Restrict Paymer Outco Item Effective Date:	ount to Account				
ay Method:					10				
		ton information	Tender Details	Due Date:	IS AND A	update Cleptey			
eve 🕑 foot		tion. Information	Tender Details			update Chapter			

Step	Action
27.	Enter an amount in the <b>Amount</b> field.
	For this example, enter <b>25.00</b> .
28.	Click the <b>Term</b> field lookup icon.
29.	Click the <b>Look Up</b> 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 <b>1350 – Spring 2009</b> .
31.	The optional <b>Due Date</b> 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 <b>Due Date</b> 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 <b>Save</b> button.
34.	As soon as you press the <b>Save</b> button, the <b>Group ID</b> field will display a <b>Group ID</b> number.
	Record this number, as you will use it later.
	Group ID: 0000000053253
35.	To begin the third phase of creating your entry, click the <b>Group Entry</b> tab. Group Entry
36.	In this phase, you will complete three items in the <b>Control Totals</b> section, the <b>Balance Group</b> selection and the amount and quantity <b>Control Total</b> fields.
37.	Before you begin, however, notice that the <b>Entered Total</b> field displays negative values.
	After you complete your entries in the <b>Control Totals</b> section, these fields will both display 0.

Step	Action
38.	First, select the box for <b>Balance Group</b> .
	When this box is selected, the <b>Deposit Balance</b> field will show "Balanced" when the entry is posted, if the items balance.
	In this example, no entries have been made and the posting status is incomplete, so the field displays "Not Balanced."
39.	Second, enter an amount in the <b>Control Total</b> field. The amount you enter should match the amount in the <b>Entered Total</b> field.
	For this example, enter <b>25.00</b> .
40.	Notice that the <b>Difference</b> field now displays 0.00 instead of -25.00.
41.	Third, enter the amount of data records. Like the <b>Control Total</b> field, this amount should match the amount shown in the <b>Entered Total</b> field.
	For this example, since one item was entered, enter the number <b>1</b> .
42.	Finish by clicking the <b>Save</b> button.
43.	Notice that the <b>Difference</b> field now displays 0.
44.	Click the <b>Home</b> link.
45.	Choose an option from the main menu, or click the <b>Sign out</b> link to terminate your session.
46.	In this topic, you learned how to:
	• Create a group post entry. End of Procedure.

### **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

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

Step	Action
1.	Log into the myUCF portal and navigate to <b>Staff Applications</b> > <b>PeopleSoft SA/HR</b> .
2.	Click the <b>Student Financials</b> link. <u>Student Financials</u>
3.	Next, click the <b>Charges and Payments</b> link. Charges and Payments
4.	Then, select Group Processing > Post Transactions.           Post Transactions
5.	The <b>Post Transactions</b> page will display.
	To begin the process of posting an entry, you will need a Run Control.
	If you do not have a Run Control:
	• First, click the Add a New Value tab.
	• Second, enter a name for your Run Control in the <b>Run Control ID</b> 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.
	If you have already created a Run Control, on the <b>Post Transactions</b> search page that displays, click the <b>Search</b> button.
6.	Select a Run Control ID from the list that displays.
	For this example, select <b>SA_GROUP_POST</b> .
7.	On the <b>Post Transactions</b> page that displays, substitute the <b>Group ID</b> number, which you recorded earlier, for the number that appears in the <b>Starting Group ID</b> and <b>Ending Group ID</b> fields.
	For this example, substitute 00000000053253 for 00000000041673 in both of these two fields.
	Starting Group ID: 0000000041673
	Ending Group ID: 0000000041673
8.	After entering the <b>Group ID</b> number in the <b>Starting</b> and <b>Ending</b> fields, click the <b>Run</b> button.
9.	On the <b>Process Scheduler Request</b> page that displays, select the <b>Group Posting Process</b> box.

Step	Action
10.	Click the <b>OK</b> button.
11.	The <b>Post Transactions</b> page will display with a <b>Process Instance</b> number. Process Instance:1240751
12.	Click the <b>Process Monitor</b> link.           Process Monitor

ORACLE				342
			Jone JW	chini Add to Envirten
				New Window   Help   Customize
Process List Server List				
Aew Process Roquest For				
User ID: Q. Type:	Last 30	Hours 🐱 Refresh		
Server: PSUNX 💌 Name:	Q, Instance:	to		
Run Distribution Status		Save On Refresh		
Process List	Customize   Find   Vie	wAll 1 First 🕘 s of s 🗈 Last		
Select Instance Seq. Process.Type	User Run Date/Time	Run Status Distribution Status		
o back to Post Transactions				
Save 🖾 Notity				
rocess List   Server List				
				S Local intranet

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



Step	Action
16.	In the next phase, you will confirm that your posted entry balanced. Click the <b>Expand Menu</b> icon.

ORACLE'	_										Hane	1 .Washint	Add to Eaven	es Sign out
Menu 🗖														
	^												New Window Help	Customice Page
- Create Group Data Entries	( P	-	and a local											
- Correct Transactions - External Files	1.1	List \ Sen		1				_						
- Post Transactions	View Pro	cess Reques	stFor											
- Review Transactions - Create Group Corp	User ID	t jdoe	Q. 1	Type:		~ L	ast:	30 Hours	Refre	sh				
Data Entries	Server:	PSUNK		lame:		Q, 10	nstance:	1	10					
<ul> <li>Correct Corporate Transactions</li> </ul>	Run Status:			Distribution Status		~		Save On Re	fresh					
- Review Suspended	Process			status		-		Customi	e I Eind I Vi	low All I	First El 10	es El Lost		
- Review Posting		stance Sec.	Desserves	Turns	Process	User	Deep	Date/Time	act coust +	Run Status	Distributio			
Information					Name		1000	12 10 10 10			Status			
- Reverse Groups - Group Post -	12	240751	COBOLS	SOL	SFPGRPST	jdoe	04/0	1/2009 11:55.5	SAM EDT	Success	Posted	Details		
Suspended														
- Group Summary - Group Detail														
- Purge Posting Table														
D Electronic Transactions D Payroll Deduction														
Processing D Group Approval														
D Lale Fees	Go back to	o Post Transa	actiona											
D Reversals D Posting Reports														
D Payment by Invoice	Save Save	E Notity												
<ul> <li>Post Obudent Transaction</li> <li>Post Corporation</li> </ul>	Process Li	ist   Server Lis	st											
Transaction - Apply Payment														
- Payment Shuffle														
<ul> <li>Validate Tables</li> <li>Assign Student</li> </ul>														
Permissions														
<ul> <li>Enrollment Deposits</li> <li>Bill Customers</li> </ul>														
Cashiering														
D Payment Plans D International Health														
Coverage > Refunds														
D Collections														
<ul> <li>D GL Interface</li> <li>&gt; Taxes</li> </ul>														
- View Customer Accounts														
- View Corporate Accounts - View Item Due														
- View Item Line														
- <u>View Item</u> - <u>View Corporate Item Due</u>														
<ul> <li>View Corporate Item Line</li> </ul>														
- <u>View Corporate Item</u> D Academic Advisement														
D Set Up HRMS D Set Up SACR														
Enterprise Components														
D Worklist D Tree Manager														
	~													
													S Local intranet	🔍 100% -

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

Step	Action
20.	The Group Entry tab fields will display.
	Notice the <b>Deposit Balance</b> and <b>Posting Status</b> fields now both display "Balanced."
21.	If an error had occurred during the posting process, the <b>Process Instance</b> field would display a number.
	For this example, the process ran without errors, so no number displays.  Process Instance:
22.	Click the Home link.
23.	Choose an option from the main menu, or click the <b>Sign out</b> link to terminate your session.
24.	In this topic, you learned how to:
	• 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

- 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 <b>Staff Applications</b> > <b>PeopleSoft SA/HR</b> .
2.	Click the <b>Student Financials</b> link. <u>Student Financials</u>
3.	Next, click the <b>Charges and Payments</b> link. Charges and Payments

Add the Records     A	ORACLE.			
Construction     C			"Home	Worklast Add to Favorites Sign
- Cardia Casua Data - State Action Data - State Action Data - State Transactions - Control Concording -	Group Processing	Main Menu > Student Financials > Charges and Payments >		
- Cardia Characterian     - Except Transaction     - Except Trans	- Create Group Data Entries	(1997)		
<ul> <li>Call Lines</li> <li>Call Lines</li> <li>Call Costs</li> <li>Call Costs</li></ul>	- Correct Transactions	V		
Construction     C			Correct Transactions	External Files
Instantion     I	- Create Group Corp Data Entries	Define control totals and create transactions to group entry for	View and update details of a student group entry transaction	Load external files for group posting.
- Beneral Stocket     - Scale Book	Transactions - <u>Review Suspended</u> <u>Transactions</u> - Review Posting	Post Transactions Post group entry information for students and organizations.	Review Transactions View group entry information after posting.	Define control totals and create transactions to group entry for
- Pure Position Take     Percent Counces     Prevent sprude of transactions     Percent Counces     P	- <u>Reverse Groups</u> - <u>Group Post</u> - Suspended - Group Summary		View group data entry and external file load transaction entries	View transactions consolidated by the Purge Quick Post Table
<ul> <li>Decision proposal</li> <li>Decision proposal&lt;</li></ul>	Purce Posting Table     Electronic Transactions     Payroll Deduction	Reverse Groups of transactions.	Group Post. Suspended View suspended transactions from a data group.	Group Summary Generate a summary report of group posting transactions.
- Peak Subscient Trans action     - Peak Subscient Transaction     - Peak Subscient Transac	D Group Approval D Late Fees D Reversals D Posting Reports	Group Detail View details for a specific data group transaction.	Consolidate student and corporation transactions into posting	
	- Eost Corporation     Transaction     Transaction     - Acade Farmerit     - Destination     - Destination			
Section 1 to and the section 1 to a				😜 Local intranet 🗮 100%

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

	LE'	-		dane	
•					New Window   Help
roup Data Ent ter any informatio		k Search. Leave fields	blank for a list of all values.		
Find an Existing 1	Value Add a Ne	w Value			
lusiness Unit:		UCF01	9		
oup ID:	begins with 💌				
ser ID:	begins with 🛩		a		
roup Type:	begins with 🛩	Т	Q		
rigin ID:	begins with 🛩		a		
osting Status:	= 🗸		~		
rstry Date:	- *				
osted Date:	s 💌		X		
case Sensitive	val: begins with 🛩		April 2009 V S M T W T F S		
nd an Eilisting Vel	ve   <u>Adda How Va</u>	La Sava Search Col	(Current Date (F))		

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 <b>Entry Date</b> field.

Step	Action				
13.	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.				
	The drop-down list that displays contains the following operators:				
	• = (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)				
	For this example, select the > operator (greater than the specified value).				
14.	Click the <b>Search</b> button.				
15.	Select a Group ID from the list that displays.				
	For this example, select 00000000052629.				
16.	The <b>Group Entry</b> tab fields will display.				
	When financial aid entries for short-term loans are created, the <b>Group Entry</b> tab fields listed below <b>must</b> always contain these values:				
	• Group Type: Short-Term Loan Credit (an advance)				
	• Origin ID: 00015 – Short-Term Loans				
	*Group Type: Short-Term Loan v *Origin ID: 00015 Q				
17.	Click the <b>Group Line Entry</b> tab. Group Line Entry				

Step	Action			
18.	The Group Line Entry tab fields will display.			
	When a Financial Aid entry for a short-term loan is created, the fields below must be completed as follows:			
	• 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.	When the entry is made, the <b>Amount</b> , <b>Term</b> , and <b>Due Date</b> fields must also be completed.			
	The <b>Ref Nbr</b> field in this example contains the <b>FINA</b> code. This code, which is frequently used in this field, indicates how the short-term loan will be paid back.			
20.	Click the <b>Home</b> link.			
21.	Choose an option from the main menu, or click the <b>Sign out</b> link to terminate your session.			
22.	In this topic, you learned how to:			
	• View a posted financial aid entry for a short-term loan.			
	• Complete the required fields for this type of entry. End of Procedure.			

# **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

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

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

Step	Action
4.	To provide more room on your screen, click the <b>Collapse Menu</b> icon located in the upper left area of your screen.

ORACLE				Wantinst Add to Fav	artes Sizo aut
			_DVD#	2001081 20010239	
					New Window   Help   1975
Manage Service Inc Enter any information you	dicators I have and click Search. Leave fields blank	for a list of all values.			
∫ Find an Existing Value	<u></u>				
ID:	begins with 🐱	1			
Campus ID:	begins with 💌	1			
Social Security Number:	begins with 🐱	]			
Last Name:	begins with 💌	]			
First Name:	begins with 🛩	]			
	Basic Search 🖬 Save Search Criteria				
				S Local intrane	t 🔍 100% -

Step	Action
5.	On the <b>Manage Service Indicators</b> 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 <b>Search</b> button, and then select a student from the list of search results that display.
	For this example, enter <b>1234567</b> in the <b>ID</b> field.
6.	Click the <b>Search</b> button.
7.	The <b>Manage Service Indicators</b> 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 <b>Service Indicator Summary</b> .



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



Step	Action	
17.	In this topic you learned how to:	
	• Perform a search for a service indicator.	
	• View a service indicator.	
	End of Procedure.	

### 4.2 Adding and Releasing a Service Indicator

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

### Procedure

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

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

Step	Action				
8.	The Add Service Indicator page will display.				
	The Start Date and Placed Person ID fields will automatically populate.				
	Click the Service Indicator Code lookup icon.				
9.	The <b>Look Up Service Indicator Code</b> page will display with a list of service indicators.				
	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.				
	For this example, select <b>SFR – Student Accounts Review</b> from the list.				
10.	The <b>Add Service Indicator</b> page will redisplay with the value you selected populating the <b>Service Indicator Code</b> field.				
	Depending on the service code you select, corresponding values will automatically populate in the following fields:				
	• Service Ind Reason Code				
	• Description				
	• Department				
	Services Impacted				
11.	Click the <b>Start Term</b> lookup icon.				
12.	Click the <b>Look Up</b> button.				
13.	Select a term from the list that displays.				
	For this example, select 1350 – Spring 2009. 1350 Spring 2009				

ORACLE
User Productivity Kit

Service Indicator         De       12467         disc       12467         disc       12467         disc       12467         disc       1370         disc       1350         pipor:       1100         term:       1350         pipor:       1100         term:       1350         pipor:       1100         term:       04740/2000         term:       0480/200         term:       0480/200         term:       0480/200	Add to Favorites S
De     1234507       atien:     UCF9*     University of Central Florida       ce indicator Code:     Student Accounts Review     estident Accounts Review       ce indicator Code:     REV*     Review regulitéd       ripport:	New Window   Help   Customize Page
ation: UCF91Q University of Central Florida ce Indicator Code: SFR Q Buildent Accounts Review ce Ind Reason Code: REVIV Review required ipplor: Central Code of Strate Central Florida E Peatfore Terms: 2350Q Sprg 2009 End Term: B memory Central Code of Strate Central Florida E Code Code of Strate Central Florida E Code Central Centra	
where: UPCF91 Q: University of Central Florida   ce Indicator Code:: SFR Q: Student Accounts Review   ce Ind Reason Code:: REvIew required   ipplor:: Implation:	
ce Indicator Code: es Ind Reason Code: IREVVY Reudew required reproce: Partner: P	
ce Ind Reason Code:	
tiption:	
ex Pendot Termi: 1359 Q, Spig 2009 End Termi: 59 end Date: 59 end Date	
Term:     1350 Q, Spip 2009     End Term:       Date:     0415/2009     B       Index:     0415/2009     B       Index:     CF0000022 Q, STDHT & OTHER FEES TRUST FUND end:     0       Index:     0.000     Currency:     USD Q,       Index:     0.000     Currency:     USD Q,       Index:     1459789     Placed By:     Istrimutal       Index:     0     0     Istrimutal       Index:     1459789     Placed By:     Istrimutal       Index:     0     0     Currency:     USD Q,	
Date: 04/15/2009 B End Date: B mining Data: CP0000022 C End Date: B mining Data: CP0000022 C End Date: B mining Data: CP0000022 C End Date: End Date: B mining Data: CP0000022 C End Date: End	
energy Datafas  fameration  fameration  energy  fameration  energy  fameration  energy  fameration  energy  energy  energy  fameration  energy  energy energy energy  energy energy energy  energy  energy  energy energy energy energy energy energy energy energy energy energy  energy  energy energy ener	
ntiment: CF0000023 Q. STDNT & OTHER FEES TRUST FUND ence:	
ence: en	
Internet Contract Person: Currency: USD Q.  I Information Contact Person: Cont	
At Description Contact Person: At Description Contact Person: Attribut	
d Person ID: 3456789 0, Placed By: Utwintal with and a second sec	
en Simpacked Contorneze   Emil View Al A First Control Last Backs Description Emil Subdett Refund Check (Hold) e Indicator Date Time: 04/16/2009 10:30:24441 b: mmmm Mmm,M	
es Impacted Check (Host) Check	
es Impacted Check (Host) Check	
Bacta Description Basis_Date Basis_Date Basis_Term Term Category USO Student Refund Check (Hold) Provide Time: 04/16/2009 10:30:244M Dt mmmm Mmm,M	
Bacta Description Basis_Date Basis_Date Basis_Term Term Category USO Student Refund Check (Hold) Provide Time: 04/16/2009 10:30:244M Dt mmmm Mmm,M	
Bacta Description Basis_Date Basis_Date Basis_Term Term Category USO Student Refund Check (Hold) Provide Time: 04/16/2009 10:30:244M Dt mmmm Mmm,M	
UDIQ Datemit Refund Check (Hold) e Indicator Date Time: 04/16/2009 10:30:244M D: mmmm Mmm,M	
D: mmmm Mmm,M	
D: mmmm Mmm,M	
Cancel Apply	

Step	Action
14.	Enter an optional comment in the <b>Comment</b> field.
	For this example, enter Charges pending.
15.	Click the <b>OK</b> button.
16.	The <b>Manage Service Indicators</b> 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 <b>SFR</b> .
17.	The Edit Service Indicator page will display.
	Click the <b>Release</b> button.
18.	Respond to the confirmation message that displays by clicking the <b>OK</b> button.



Step	Action
19.	The <b>Manage Service Indicators</b> page that displays will no longer show the service indicator you just released.
	Click the <b>Home</b> link near the top of the page to return to the main menu.
20.	From the home page that displays, either click a menu link or click the <b>Sign out</b> link to terminate your current session.
21.	In this topic, you learned how to: • Add a service indicator.
	• Release a service indicator. End of Procedure.