

View Configuration of a Charge

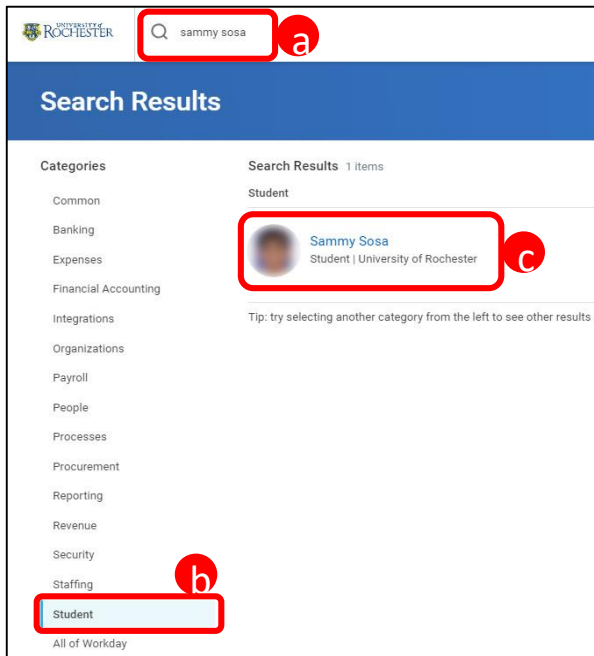
In your work, you are likely to view account transactions, such as Charges, Waivers, and Payments frequently. It will be helpful for you to know and understand how these transactions are configured in greater detail.

View Configuration of a Charge

Note: If you already know the name of the charge item you may search for it using **Find Student Charge Item**. If you are unsure of the name, but know a student with that charge on their account follow the steps below.

From your UR Student Home Page

1. Find the student
 - a. Type the student's name or UR ID in search
 - b. Select Student from the categories
 - c. Click the student's name



Search Results

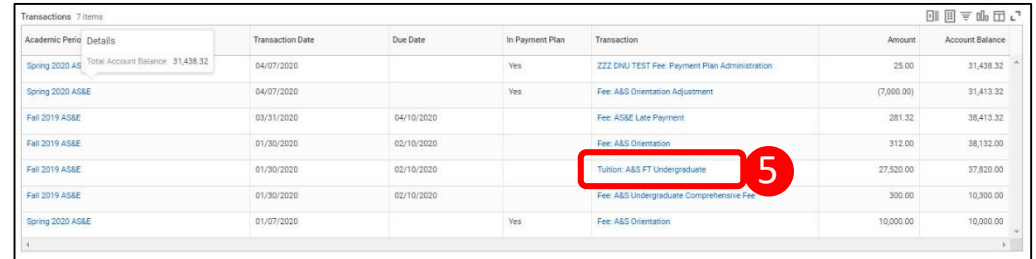
Categories: Common, Banking, Expenses, Financial Accounting, Integrations, Organizations, Payroll, People, Processes, Procurement, Reporting, Revenue, Security, Staffing, Student, All of Workday

Search Results 1 items

Student

Sammy Sosa
Student | University of Rochester

2. Click **Student Financials** (left blue column)
3. Click **Account Transactions**
4. Find the charge you want more detail about; in this example, *Tuition: A&S FT Undergraduate*
5. The Transaction Name is a hyperlink; click **Tuition A&S FT Undergraduate**



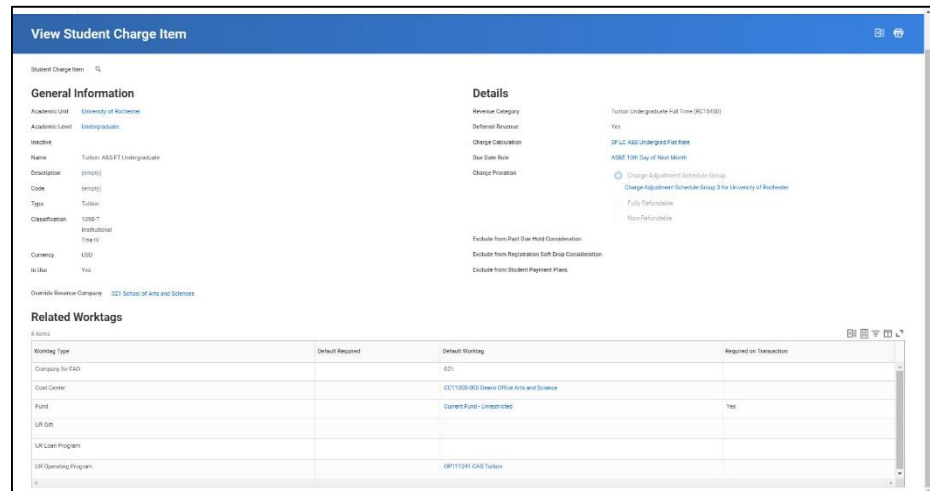
Academic Period	Transaction Date	Due Date	In Payment Plan	Transaction	Amount	Account Balance
Spring 2020 AS	04/07/2020		Yes	ZZZ DNU TEST Fee: Payment Plan Administration	25.00	31,438.32
Spring 2020 AS&E	04/07/2020		Yes	Fee: A&S Orientation Adjustment	(7,000.00)	31,413.32
Fall 2019 AS&E	03/31/2020	04/10/2020		Fee: AS&E Late Payment	281.32	38,413.32
Fall 2019 AS&E	01/30/2020	02/10/2020		Fee: A&S Orientation	312.00	38,132.00
Fall 2019 AS&E	01/30/2020	02/10/2020		Tuition: A&S FT Undergraduate	27,520.00	37,820.00
Fall 2019 AS&E	01/30/2020	02/10/2020		Fee: A&S Undergraduate Comprehensive Fee	300.00	10,300.00
Spring 2020 AS&E	01/07/2020		Yes	Fee: A&S Orientation	10,000.00	10,000.00

6. Next to **Charge Item**, click the *Tuition A&S FT Undergraduate* hyperlink



Charge Item: Tuition: A&S FT Undergraduate

7. The screen that appears provides extensive information on the configuration of the specific charge item. Any item in blue is a hyperlink you can click to get even more detail



View Student Charge Item

Student Charge Item: Tuition: A&S FT Undergraduate

General Information

Academic Unit: University of Rochester
Academic Level: Undergraduate
Inactive: No
Name: Tuition: A&S FT Undergraduate
Description: (91900)
Code: (91900)
Type: Tuition
Classification: 1099-T Institutional
Currency: USD
In Use: Yes

Details

Revenue Category: Tuition Undergraduate Full Time (9C19-00)
Default Revenue: Yes
Charge Calculation: SP12 AS&S Undergrad Full Rate
Due Date Rule: AS&S 15th Day of Next Month
Charge Paraphrase: Charge Adjustment Schedule Group
Charge Adjustment Schedule Group 3 for University of Rochester
Fully Refundable: Yes
Non-Refundable: No

Exclude from Paid Due Hold Consideration: No
Exclude from Registration Soft Drop Consideration: No
Exclude from Student Payment Plans: No

Oversee Revenue Company: 021 School of Arts and Sciences

Related Worktags

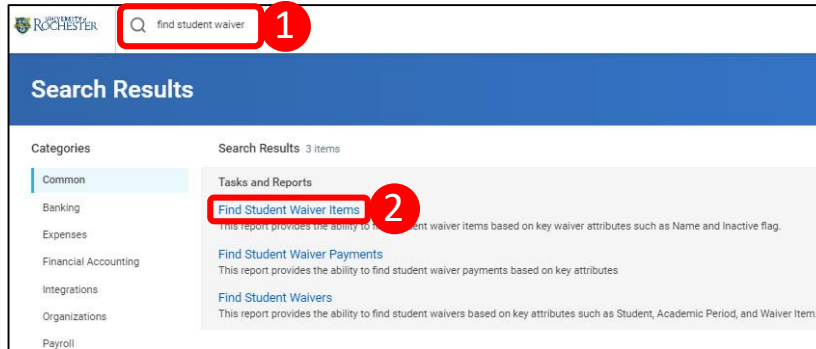
Worktag Type	Default Required	Default Worktag	Required on Transaction
Company for F&D		021	
Cost Center		CC1900-000 Office Arts and Science	
Fund		Current Fund - Unrestricted	Yes
UR GR			
UR Loan Program			
UR Operating Program		09112001 Cash Tuition	

View Configuration of a Waiver or Payment

View Configuration of a Waiver

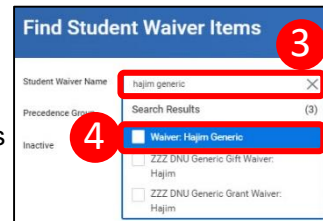
At your UR Student Home page

1. Enter **Find Student Waiver** in the search field
2. Click **Find Student Waiver Items**

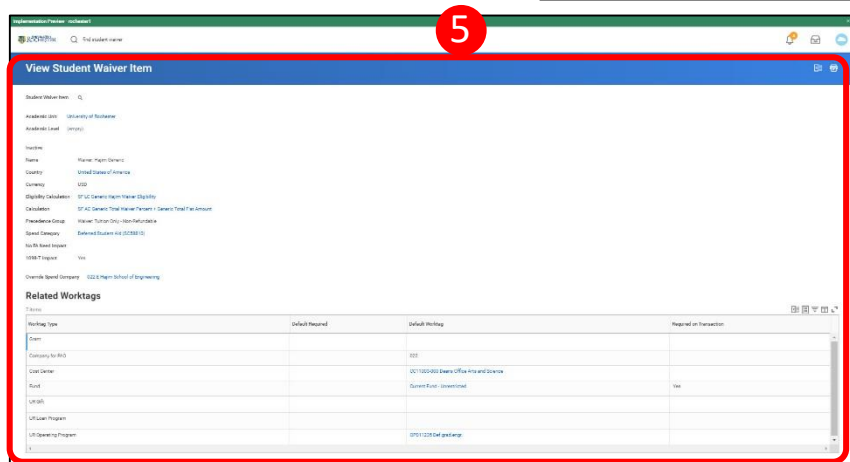


The screenshot shows the search results page for 'find student waiver'. The search bar contains 'find student waiver' (1). Under the 'Tasks and Reports' section, 'Find Student Waiver Items' is highlighted (2). Below it, there are links for 'Find Student Waiver Payments' and 'Find Student Waivers'.

3. Enter or search for the **Student Waiver Name**, select it and click **OK**
4. Click the **Waiver** name hyperlink
5. The **View Student Waiver Item** provides extensive detail on the Waiver including the 1098-T Impact indicator



The screenshot shows the 'Find Student Waiver Items' search results. The search bar contains 'hajim generic' (3). The search results list includes 'Waiver: Hajim Generic' (4), which is highlighted. Other results include 'ZZZ DNU Generic Gift Waiver: Hajim' and 'ZZZ DNU Generic Grant Waiver: Hajim'.



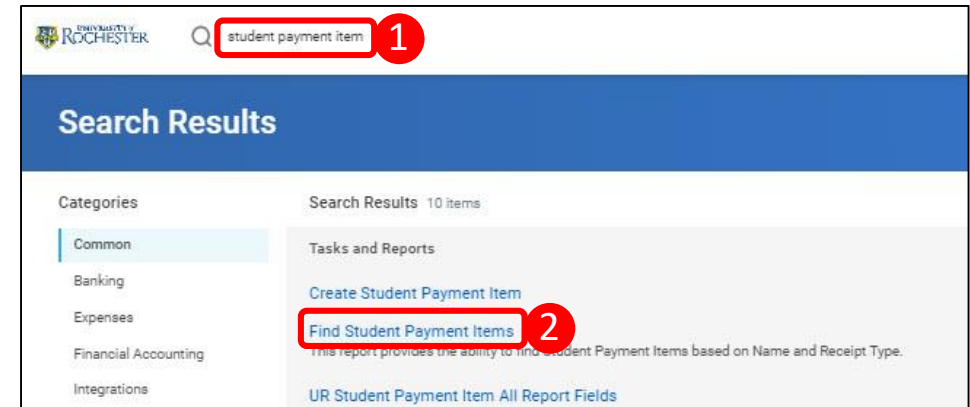
The screenshot shows the 'View Student Waiver Item' detail page (5). It displays fields for Student Waiver Name, Academic Unit, Academic Levels, Currency, Payment Receipt Type, Student Precedence Group, and Inactive. Below these fields is a 'Related Worktags' table.

Worktag Name	Default Precedence	Default Inactive	Precedence on Transaction
Common			
Common for 803			
Unit Center			
Unit			
Unit			
Unit			
Unit			
Unit			

View Configuration of a Payment

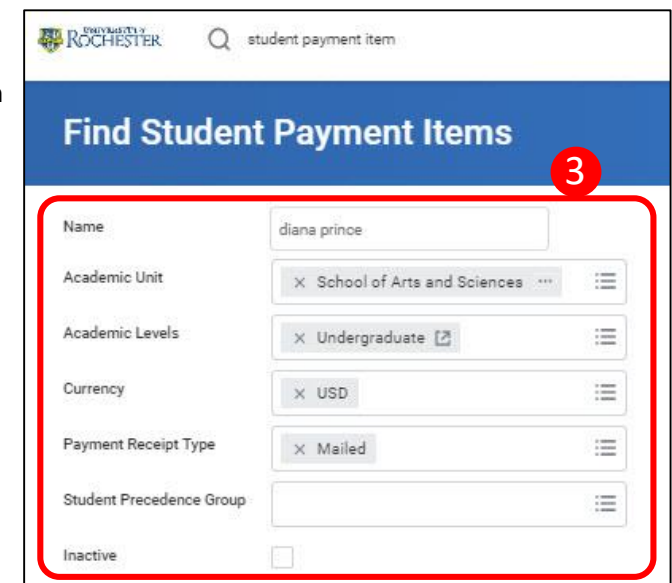
From your UR Student Home page

1. Enter **Find Student Payment Items** in the search field
2. Click **Find Student Payment Items**



The screenshot shows the search results page for 'student payment item'. The search bar contains 'student payment item' (1). Under the 'Tasks and Reports' section, 'Find Student Payment Items' is highlighted (2). Below it, there are links for 'Create Student Payment Item' and 'UR Student Payment Item All Report Fields'.

3. There is little configuration detail for Payments; when received, they are directly applied against the relevant charge
4. After clicking **OK**, the detail screen appears for the specified payment



The screenshot shows the 'Find Student Payment Items' detail page (3). It displays fields for Name, Academic Unit, Academic Levels, Currency, Payment Receipt Type, Student Precedence Group, and Inactive. The 'Name' field contains 'diana prince', 'Academic Unit' is 'School of Arts and Sciences', 'Academic Levels' is 'Undergraduate', 'Currency' is 'USD', and 'Payment Receipt Type' is 'Mailed'.