

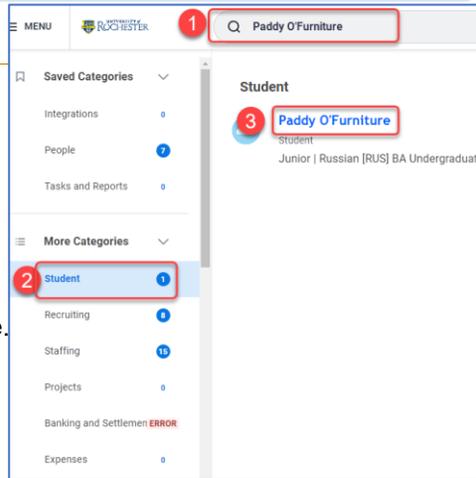
# View Student Financials & Account Transactions

There will be times you need to view information on a specific student. Depending on your security role, you may not have all the functionalities shown here. Updated 06/2024

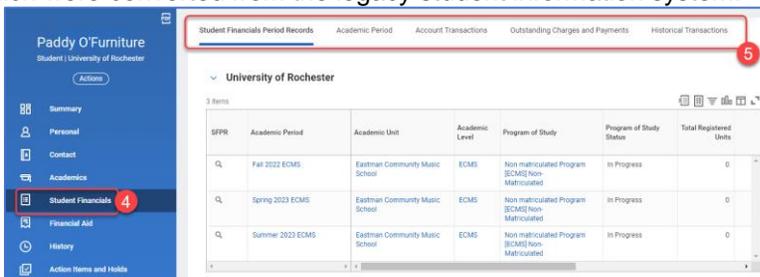
## Find Student

The first step in the process is always locating the student in UR Student

1. Type **Student's name** or **URID** in search bar then hit enter or magnifying glass.
2. Select **Student** from *the More Categories* list, if student isn't visible.
3. Click **student's hyperlink**.
4. From the Student's landing page, click **Student Financials**.
5. Notice the five tabs:



- **Student Financials Period Record** – view academic periods where students could be assessed charges and waiver payments.
- **Academic Period** – view financial information related to a specific Academic Period
- **Payment Plan** – if a student has set up a Payment Plan, view details here - This tab will NOT appear if the student has never had a payment plan in UR Student.
- **Account Transactions** – view all account transactions.
- **Outstanding Charges and Payments** – shown here, if applicable
- **Historical Transactions** – transactions prior to 2021 (pre-UR Student), which were converted from the legacy student information system.

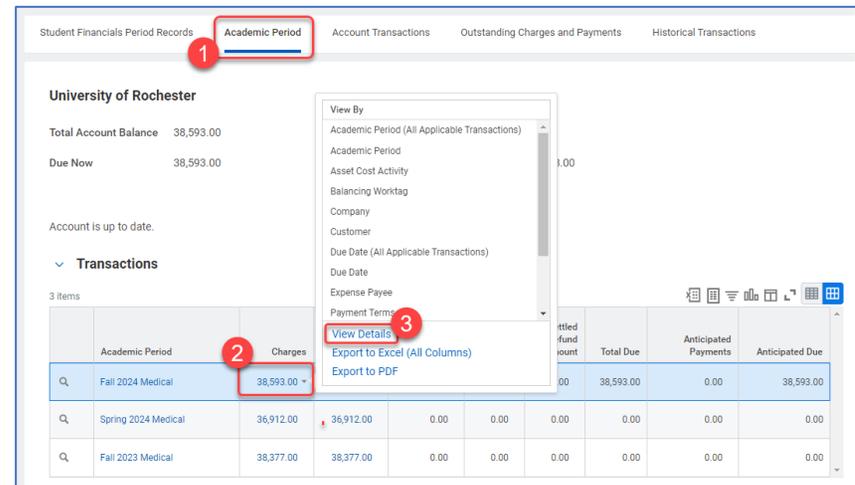


## View Academic Period Tab

To view financial information, navigate to the **Academic Period** tab.

1. On the **Academic Period** tab, hover mouse cursor over any amount shown in blue to view the drop-down arrow
2. To view more details, click **drop-down arrow**
3. Click **View Details**

**Note:** You can also Export to Excel or PDF



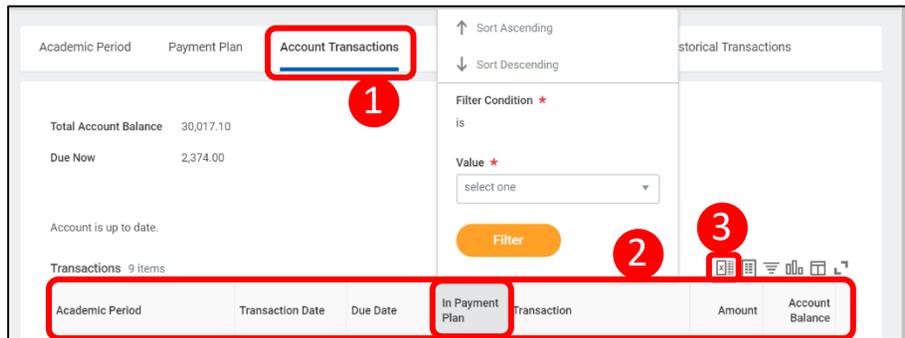
## View Account Transactions Tab

This tab allows you to view all Account Transactions for the student. By default, UR Student organizes them with the most recent transactions on top. Screenshot on reverse side

1. Click **Account Transactions** tab
2. Click any **Header** in the table to sort and filter data
3. Click the **Export** icon to export to Excel

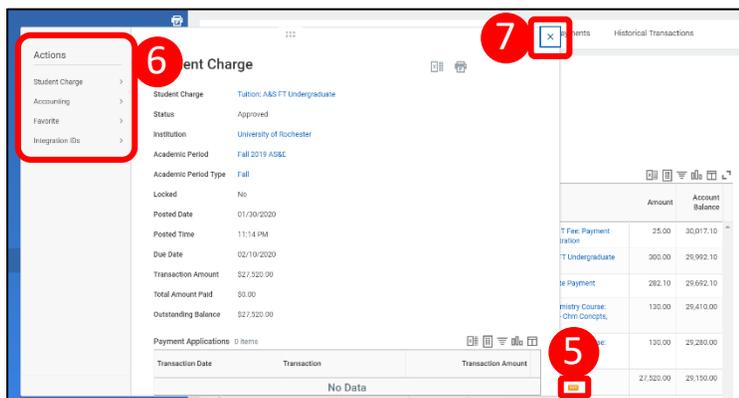
**Note:** Any filters you apply are lost when you export. Best Practice is to first export, then manipulate data in Excel.

# View Student Financials & Account Transactions

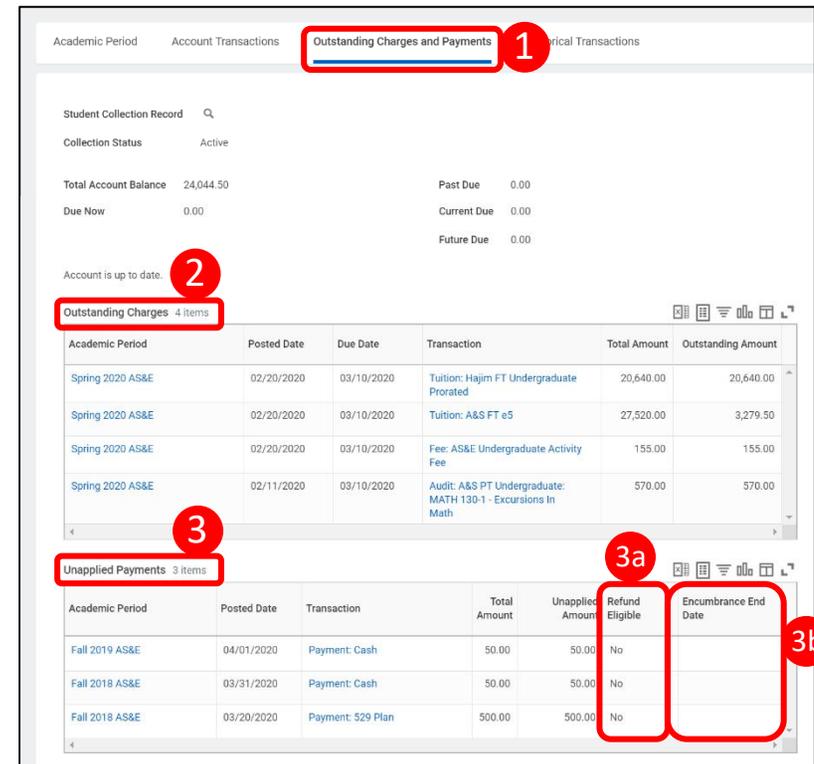


4. Hover mouse cursor over relevant **Account Transaction** to view Related Actions ( **...** ) icon
5. Click **Related Actions** icon to view Related Actions

6. Perform any **Related Actions** by hovering the mouse cursor over the action
7. Click the blue **X** or click off to close pop up



- 3a. For Online payments, **Refund Eligible** reads **No** until they are settled overnight
- 3b. If a payment is encumbered, it cannot be refunded until after the **Encumbrance End Date** (see below)



Academic Period	Posted Date	Due Date	Transaction	Total Amount	Outstanding Amount
Spring 2020 AS&E	02/20/2020	03/10/2020	Tuition: Hajim FT Undergraduate Prorated	20,640.00	20,640.00
Spring 2020 AS&E	02/20/2020	03/10/2020	Tuition: A&S FT e5	27,520.00	3,279.50
Spring 2020 AS&E	02/20/2020	03/10/2020	Fee: AS&E Undergraduate Activity Fee	155.00	155.00
Spring 2020 AS&E	02/11/2020	03/10/2020	Audit: A&S PT Undergraduate: MATH 130-1 - Excursions In Math	570.00	570.00

Academic Period	Posted Date	Transaction	Total Amount	Unapplied Amount	Refund Eligible	Encumbrance End Date
Fall 2019 AS&E	04/01/2020	Payment: Cash	50.00	50.00	No	
Fall 2018 AS&E	03/31/2020	Payment: Cash	50.00	50.00	No	
Fall 2018 AS&E	03/20/2020	Payment: 529 Plan	500.00	500.00	No	

## Outstanding Charges and Payments Tab

This tab provides information on Outstanding Charges and Payments, as well as Unapplied Payments and the Encumbrance period. If a student has no outstanding charges or payments, no data populates

1. Click the **Outstanding Charges and Payments** tab
2. View **Outstanding Charges**, if applicable
3. View **Unapplied Payments**, if applicable

## Encumbrance

- Different payment types are encumbered for different timeframes
- The Encumbrance Date for an Online payment expires 5 days after settlement
- Financial aid and Waiver payments are not encumbered
- If a payment is encumbered, it cannot be refunded until after the Encumbrance End Date

# View Student Financials & Account Transactions



## Student Financials Period Record

The tab you land on when you click Student Financials is the Student Financial Period Record (SFPR), which contains the following information:

1. A student's **SFPR** details.
2. The **Academic Period** the SFPR is on.
3. The **Academic Unit** the student is in.
4. The student's **Academic Level**.
5. The student's **Program of Study**.
6. The **Program of Study Status**.
7. The student's **Total Registered Units**.
8. The student's **Total Billing Units**.
9. If a student is in any **Cohorts**.
10. If the student has a related **FAPR**.
11. When the student **Last Assessed**.
12. If the SFPR **Needs Update**. Should this say "yes," something has changed that will cause the student to reassess overnight.

Note: You can also Export to Excel or Worksheets

1	2	3	4	5	6	7	8	9	10	11	12
SFPR	Academic Period	Academic Unit	Academic Level	Program of Study	Program of Study Status	Total Registered Units	Total Billing Units	Cohorts	Related FAPR	Last Assessed	Needs Update
Q	Fall 2023 Medical	School of Medicine and Dentistry	Medical	Medicine [MED] MD	In Progress	0	0	Billing: Med School Phase 1 SMD Class of 2027	Fall 2023 Medical		
Q	Spring 2024 Medical	School of Medicine and Dentistry	Medical	Medicine [MED] MD	In Progress	0	0	Billing: Med School Phase 1 SMD Class of 2027	Spring 2024 Medical		
Q	Fall 2024 Medical	School of Medicine and Dentistry	Medical	Medicine [MED] MD	In Progress	0	0	Billing: Med School Phase 2 SMD Class of 2027	Fall 2024 Medical	06/25/2024 09:43:22 AM EDT	
Q	Spring 2025 Medical	School of Medicine and Dentistry	Medical	Medicine [MED] MD	In Progress	0	0	SMD Class of 2027	Spring 2025 Medical		
Q	Fall 2025 Medical	School of Medicine and Dentistry	Medical	Medicine [MED] MD	In Progress	0	0	SMD Class of 2027	Fall 2025 Medical		
Q	Spring 2026 Medical	School of Medicine and Dentistry	Medical	Medicine [MED] MD	In Progress	0	0	SMD Class of 2027	Spring 2026 Medical		
Q	Fall 2026 Medical	School of Medicine and Dentistry	Medical	Medicine [MED] MD	In Progress	0	0	SMD Class of 2027	Fall 2026 Medical		
Q	Spring 2027 Medical	School of Medicine and Dentistry	Medical	Medicine [MED] MD	In Progress	0	0	SMD Class of 2027	Spring 2027 Medical		