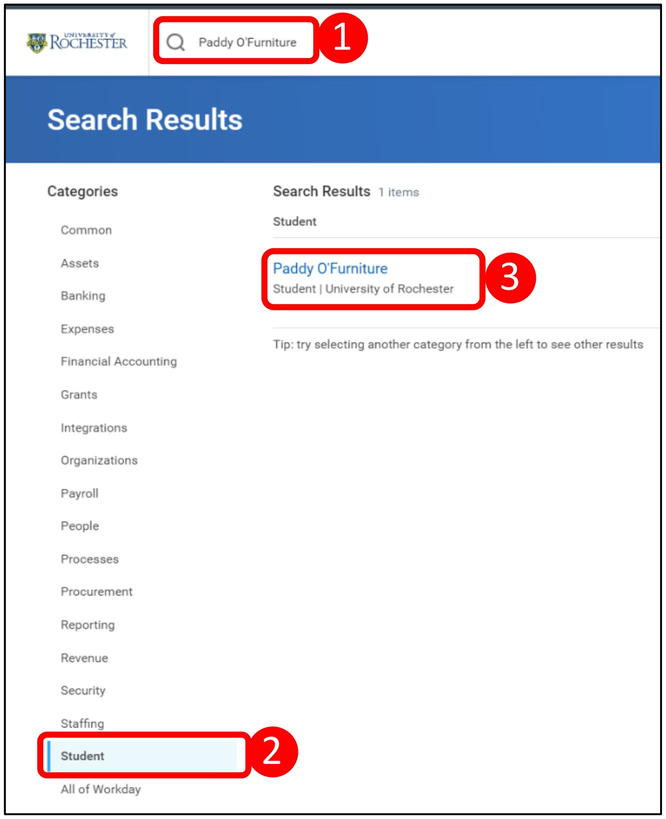
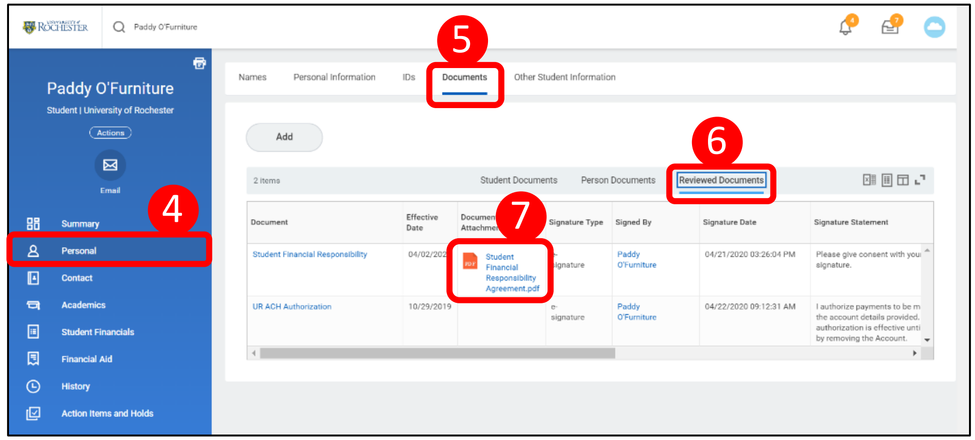
View/Retrieve Financial Responsibility Agreement

The Financial Responsibility Agreement must be signed by all students. Here, a student agrees that they will pay their bills. If a student does not pay, U of R has the right to send them to a collection agency and charge the resulting additional costs.

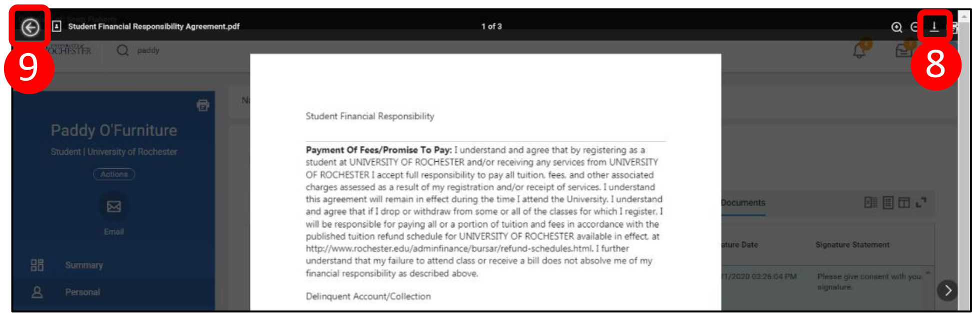
1. Type **student's name** or **UR ID** in the search bar
2. Select **Student** from Categories list
3. Click student's name **hyperlink**



4. Click **Personal**
5. Click the **Documents** tab
6. Click the **Reviewed Documents** tab
7. Click the **PDF hyperlink** to visualize the Student Financial Responsibility Agreement



8. Click the **Download icon** to save a local copy to be attached to an email, if necessary
9. Click the **back arrow**



Important: When you send this document to the collection agency, you must send the additional information provided in the Reviewed Documents table, including the date and time the student signed it.

Best Practice: Take a screenshot of the relevant table row in UR Student and include it in your email

Document	Effective Date	Document Attachment	Signature Type	Signed By	Signature Date	Signature Statement
Student Financial Responsibility	04/02/2020	Student Financial Responsibility Agreement.pdf	e-signature	Paddy O'Furniture	04/21/2020 03:26:04 PM	Please give consent with your e-signature.

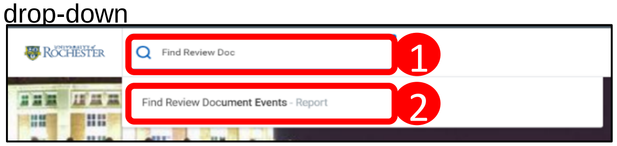
Reproduce ACH Authorization Form

An account holder has stated that there is a charge on their bank account that was not authorized, therefore, they believe the charge is invalid. In this case, you would need to reproduce the ACH Authorization Form, which account holders (students or Friends & Family) complete during the Payment Election process.

You may follow the steps from the "View/Retrieve Financial Responsibility Agreement" process to view the ACH Authorization Form for a particular account holder. If the account holder has completed the authorization it will appear in the Reviewed Documents tables.

To find ACH Authorization Forms for multiple people, follow these steps:

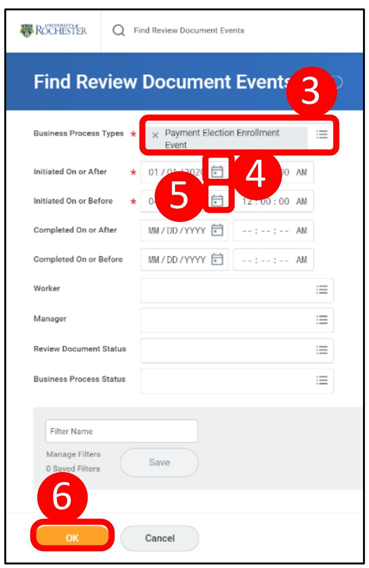
1. Type **Find Review Doc** in search bar
2. Select **Find Review Document Events** from drop-down



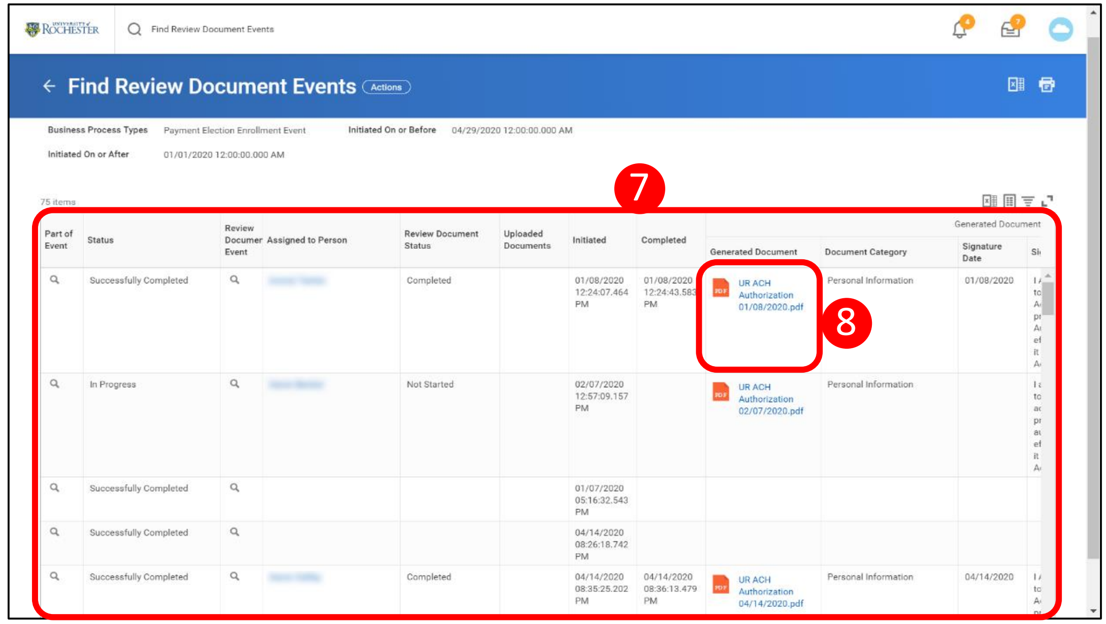
3. Type **Payment Election** in Business Process Types field and press Enter
4. Click the **calendar icon** to set the **Initiated on** or **After** date

   Note: It is recommended you choose a date prior to their first student account transaction.
5. Click the **calendar icon** to se the **Initiated on** or **Before** date

   Note: Choose today's date
6. Click **OK**



7. View specific information on the **Status** of the ACH Authorization Form including the time and date of when it was **Initiated** and **Completed**
8. Click the **PDF hyperlink** to visualize the PDF for a student



Note: Additional steps may be required if the account holder is a third party / Friends & Family. Ask your manager or supervisor for assistance in these cases.