

Record and Cancel Payments

Payments come into the Bursar's office in many ways: checks, cash, credit card, 529 College Savings Plan payments and more. Follow these steps to record or cancel payments easily.

Record Payments

From your UR Student Home Page

1. Enter **Record Student Payment** (can be abbreviated to first 3 letters in each word) in the search field

2. Click **Record Student Payment** in search results

3. Enter or search for the student's name

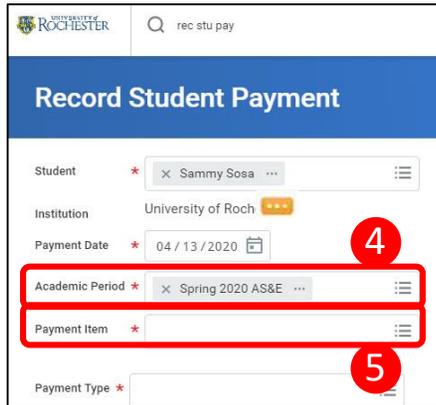
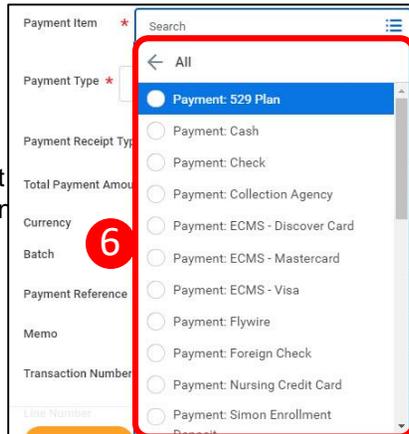
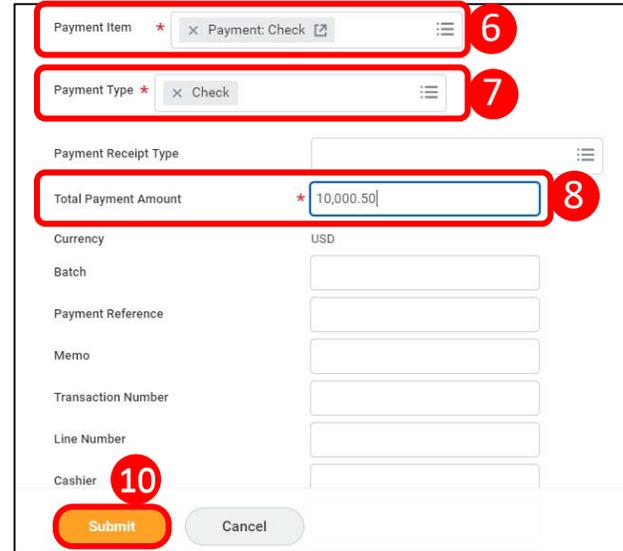
4. Click **Academic Period** and search or select the appropriate period; only periods when the student is expected to be enrolled display

5. Click **Payment Item**

6. Select **All** and select the appropriate payment type

7. Click **Payment Type** and options appear for the type of Payment Item selected above

8. Click **Total Payment Amount** and enter the payment amount

9. Complete other fields as requested by the Bursar

- a. The Payment Reference field is important for SMD and ESM; enter the school's two-digit code so payments balance at the end of the day and reconcile bank deposits

- b. Do not use the Notify Financial Aid of Private Scholarship field; use the existing scholarship process

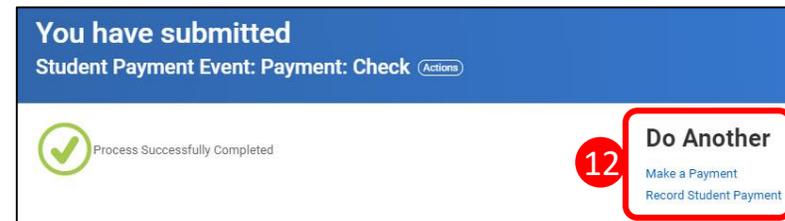
- c. Do not use the Attachments functionality until notified by the Bursar

10. When finished, click **Submit**

11. At the confirmation screen, click **Done**

12. You can record another payment directly from the confirmation screen

SMD	TBD
ESM	32
River Campus	blank



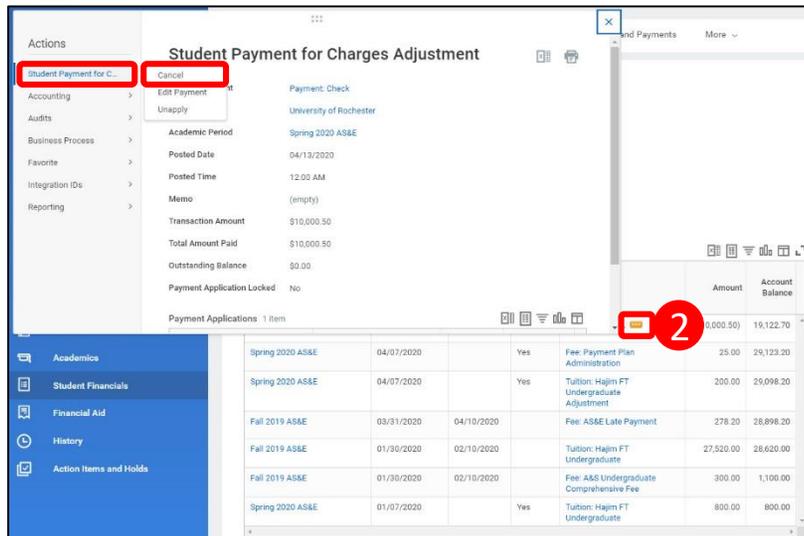
Record and Cancel Payments

If a mistake occurs when recording a payment and the error is caught on the same day prior to closeout, the best practice is to cancel the payment and reenter it correctly. As a Reactive Control, UR Student produces a report of staff members who have adjusted payment amounts.

Cancel a Payment

From your UR Student Home Page

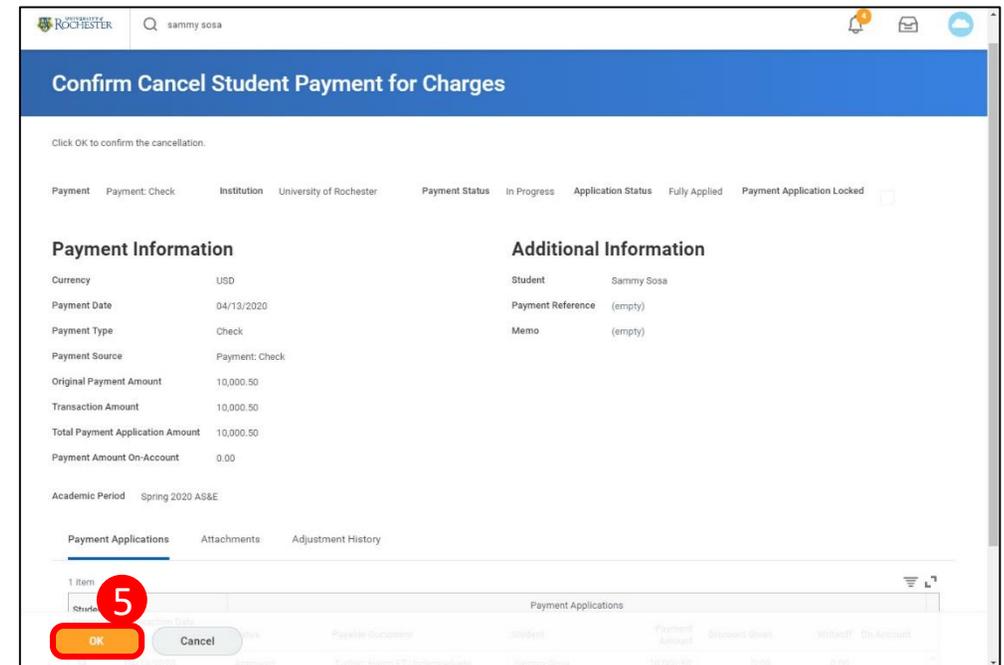
1. Navigate to the student's Account Transactions page
2. Hover over the incorrect payment and click the **Related Actions** (⋮) icon



The screenshot shows the 'Student Payment for Charges Adjustment' window. The 'Cancel' button is highlighted with a red box and a '2'. The 'Student Payment for Charges Adjustment' button is also highlighted with a red box and a '1'. The window displays payment details for a check payment of \$10,000.50 on 04/13/2020. Below the window, a table of payment applications is visible, with the first row highlighted in blue.

Academic Period	Payment Date	Payment Status	Payment Type	Amount	Account Balance
Spring 2020 AS&E	04/07/2020	Yes	Fee: Payment Plan Administration	25.00	29,123.20
Spring 2020 AS&E	04/07/2020	Yes	Tuition: Hajim FT Undergraduate Adjustment	200.00	29,098.20
Fall 2019 AS&E	03/31/2020	04/10/2020	Fee: AS&E Late Payment	278.20	28,898.20
Fall 2019 AS&E	01/30/2020	02/10/2020	Tuition: Hajim FT Undergraduate	27,520.00	28,620.00
Fall 2019 AS&E	01/30/2020	02/10/2020	Fee: A&S Undergraduate Comprehensive Fee	300.00	1,100.00
Spring 2020 AS&E	01/07/2020	Yes	Tuition: Hajim FT Undergraduate	800.00	800.00

3. Click **Student Payment for Charges Adjustment**
4. Click **Cancel**
5. On the **Confirm Cancel** screen, click **OK**
6. Use the Record Student Payment task to replace the payment you just canceled



The screenshot shows the 'Confirm Cancel Student Payment for Charges' screen. The 'OK' button is highlighted with a red box and a '5'. The screen displays payment information for a check payment of \$10,000.50 on 04/13/2020. The 'Additional Information' section shows the student's name as Sammy Sosa. The 'Payment Applications' section shows a table with one item.

Item	Student	Payment Amount	Account Balance	On-Account
1 Item	Sammy Sosa	10,000.50	28,898.20	28,898.20