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

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

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

**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**

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