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 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

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

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

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)

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
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