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.

Find Student

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

1. Enter Student's name or UR ID in search bar, then press Enter or click the magnifying class.
2. Select Student from the Categories list.
3. Click student's hyperlink.
4. From the Student's landing page, click Student Financials.
5. Notice the five tabs:
   • 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 – to be populated in January 2021; use the legacy system until then.

View Academic Period Tab

The tab you land on when you click Student Financials is the Academic Period.

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.
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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