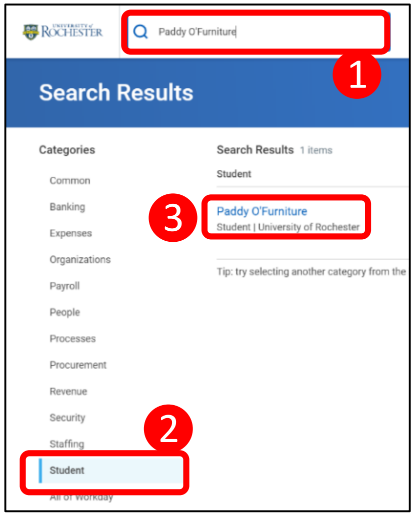
View Student Financials & Account Transactions

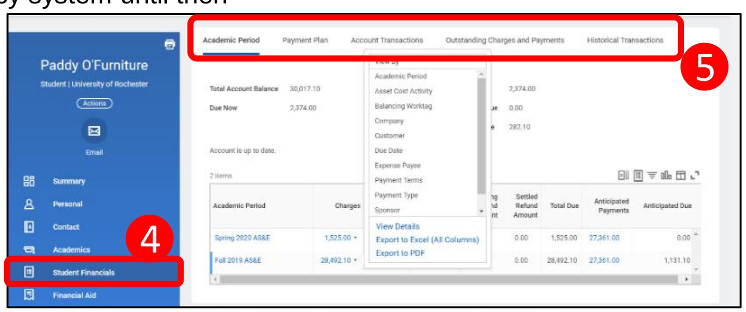
There will be times you need to view information on a specific student. Depending on your security role, you may not have all the functionalities shown here.

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
2. search bar, then press Enter or click the magnifying class
3. Select **Student** from the Categories list
4. Click **student's hyperlink**
5. From the Student's landing page, click **Student Financials**
6. 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



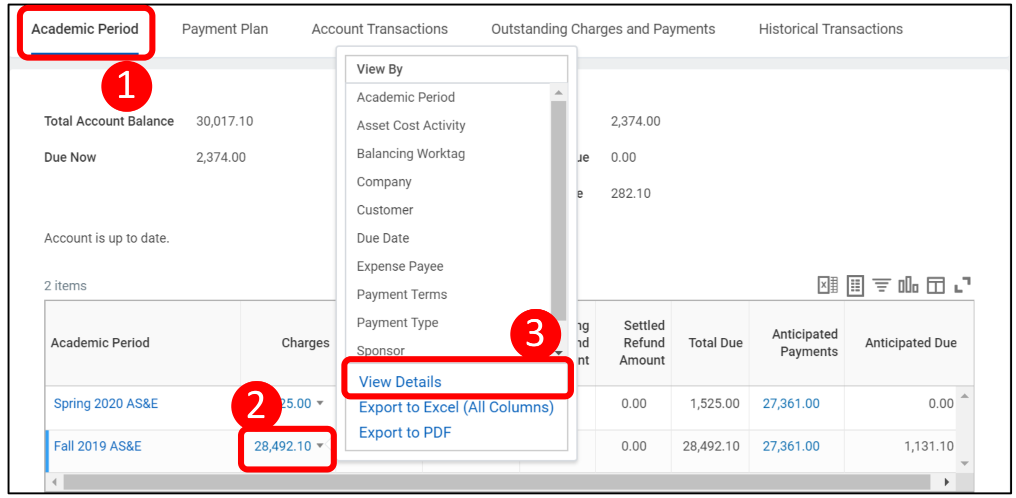


View Academic Period Tab

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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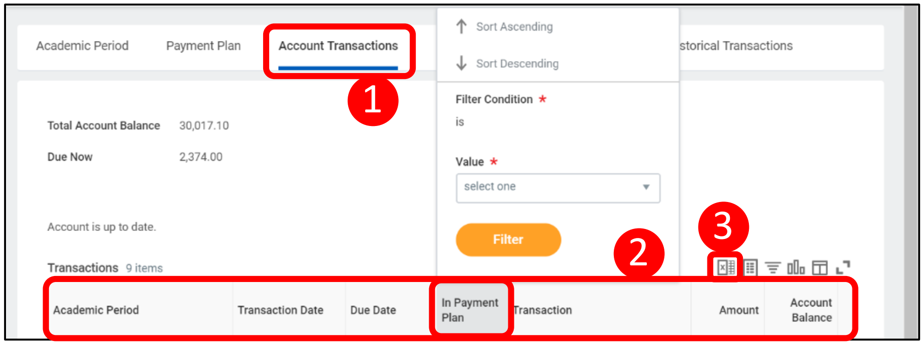
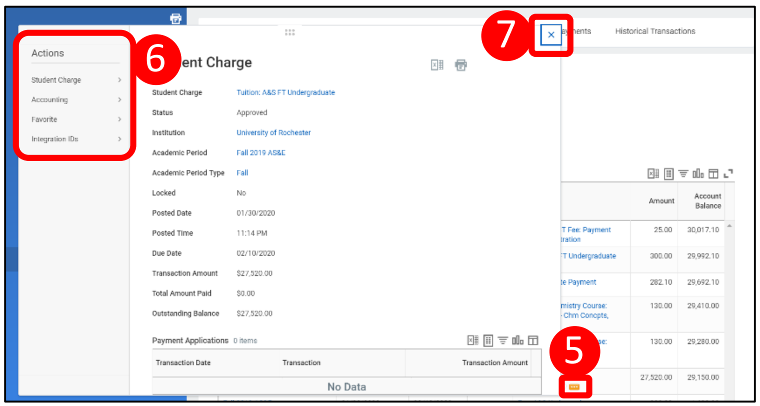
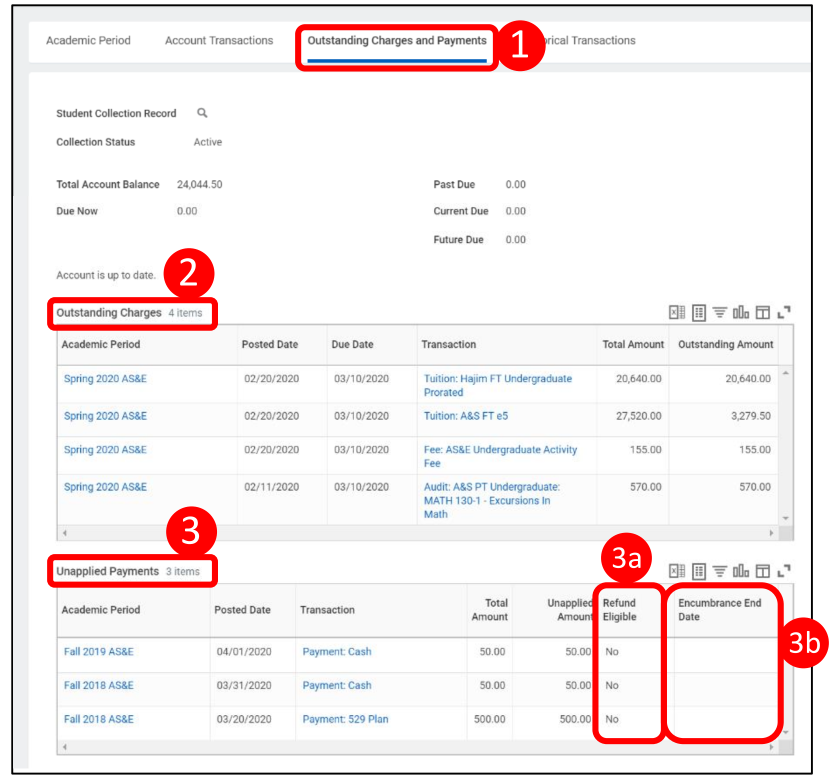


4. Hover mouse cursor over relevant **Account Transaction** to view Related Actions (▭) icon
5. Click **Related Actions** icon to view Related Actions
6. Perform any **Related Actions** by hovering the mouse cursor over the action
7. Click the blue **X** or click off to close pop up



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)



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