ENTERING/MODIFYING AND POSTING A CHARGE FOR AN INDIVIDUAL STUDENT

Use this instruction guide to enter and post charges for individuals students. To complete this task, you must attend PST310 Student Financials and have the security roles:

- UF_SF_UPDATE_CHARGES
- UF_SF_PP_XXXXXXX Defines your scope of authority where XXXXXXX = yourdepartment/unit

NAVIGATION

- 1. Navigate to my.ufl.edu and login using your Gatorlink login credentials
- 2. Then navigate to: NavBar > Student Financials > UF Campus Solutions > Student Financials > Charges and

Payments > Post Student Transaction

ENTER THE TRANSACTION

- 1. Enter the Student's UFID
- 2. Enter the appropriate account into the Account Type field
 - This field represents your department or unit
- 3. Enter or look up the appropriate Item Type
 - Only those to which have security access will be available to you
- 4. Click the Add button

Student Post	
Add a New Value	
Business Unit:	UFLOR Q
ID:	02062630
Account Type:	AT Q
Item Type:	312020500001
User ID:	
Group Line Time Stamp	05/15/2018 9:45:43AM
Line Sequence Nbr:	1
Add	

5. Enter the appropriate amount into the Amount field



Student Information System

• If you are modifying a charge, enter the adjusting amount

Business Unit:	University of Florida				
ID:		Alligator, Alberta B			*
Balance:	2,488.02	Anticipated Aid:	0.00		
Account Type:	Academic Technology		1	New Transaction	Post
Item Type:	312020500001	AT-CIRCA Laser Print January			
Amount:	15.0	USD Currency Detail			
Term:	Q				
Reference Number:					
Item Effective Date:	05/15/2018				
Due Date:	07/01/2018				
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Student Accounts	Academic information	Payment Details			

- 6. Click in the **Term** field and enter the term
 - The first digit is the century (1 = 20th century; 2 = 21st century)
 - The second & third digits are the last digits of the calendar year (08 = 2008; 15 = 2015)
 - The fourth digit is the semester and the Registrar codes the semester based on the month the semester begins (1-January = Spring; 5-May = Summer; 8-August = Fall)
- 7. Enter the Reference Number
 - The same Reference Number is used when modifying or reversing a transaction
 - The Reference Number can be up to 30 digits
- 8. The Item Effective Date will auto-populate to the date the charge is entered
- 9. The system will auto-populate a **Due Date**
 - The due date can be changed to a date further in the future, but cannot be any sooner than 30 days
 - If you need to adjust the due date, click in the Due Date field and enter or select the different due date



10. Click the Post button

• This will post the charge

Business Unit:	University of Florida				
D:	02062630	Alligator, Alberta B			*
Balance:	2,488.02	Anticipated Aid:	0.00		
Account Type:	Academic Technology			New Transaction	Post
tem Type:	312020500001	AT-CIRCA Laser Print January			
Amount:	15.00	USD Currency Detail			
Term:	2181 Q				
Reference Number:	Test				
tem Effective Date:	05/15/2018				
Due Date:	07/01/2018				
Student Accounts	Academic Information	Payment Details			
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VIEW THE TRANSACTION

There are several ways to view the activity associated with a student. The instructions below reflect an administrative view which mimics the way a student can view the activity.

1. Navigate to UF Campus Solutions > Student Information System > Student Financials >

View Customer Accounts

- 2. Enter the UFID of the student in the ID field
- 3. Click the Search button
- 4. Select your Account Type to see the charge posted
 - The Related Content link will also show the student's charges due with the posted transaction
 - The student will not have access to this page
 - NOTE: The student will navigate to ONE.UF and select the Campus Finances card

FOR FURTHER ASSISTANCE

- Review the myUFL Toolkit for Student Financials at the Human Resource Services website
- Navigate to <u>hr.ufl.edu</u> and select: Training > myUFL Toolkits > Student Financials
- Click here: <u>http://www.hr.ufl.edu/training/myUFL/toolkits/StudentFinancials.asp</u>
- Contact the UF Help Desk at <u>helpdesk@ufl.edu</u> or call them at (352)392-HELP

If you need assistance, please contact the UF Help Desk at 392-HELP or <u>helpdesk@ufl.edu</u>.