# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>COURSE OVERVIEW</td>
<td>2</td>
</tr>
<tr>
<td>LESSON 1: CUSTOMER ACCOUNT ACTIVITY</td>
<td>3</td>
</tr>
<tr>
<td>LESSON 2: ACCOUNT DETAILS</td>
<td>6</td>
</tr>
<tr>
<td>LESSON 3: ACADEMIC INFORMATION</td>
<td>9</td>
</tr>
<tr>
<td>LESSON 4: SERVICE INDICATORS</td>
<td>12</td>
</tr>
<tr>
<td>LESSON 5: ANTICIPATED AID</td>
<td>15</td>
</tr>
<tr>
<td>LESSON 6: TUITION CHARGES</td>
<td>16</td>
</tr>
</tbody>
</table>

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Course Overview

This course is designed to provide an overview of the Customer Account information for anyone having access to Student Financials. It is important to have a good understanding of the information contained on the Customer Account page, as well as a basic understanding of tuition charges and the variables related to these charges.

The topics covered in this course are:

► Customer Account Activity
► Account Details
► Academic Information
► Service Indicators
► Anticipated Aid
► Tuition Charges
Lesson 1: Customer Account Activity

There are two navigation methods which can be used to access the Customer Account Activity. The navigation used is based on your role at The University of Akron.

- **Advisors:**
  - Campus Community > Student Services Center (click the “Finances” tab)

- **All Other Users:**
  - Student Financials > View Customer Accounts

1. Log in to PeopleSoft and use the appropriate navigation to access the Customer Account page (see above).

2. Enter the student EmplID (Campus ID) or search by the student’s name. Click Search.
3. The student account displays. Account activity is generated by term as follows:
   a. Fees: Tuition, housing and meal plan
   b. STL: Short term loan
   c. PP: Payment plan
   d. Misc: other accounts

4. Total: Overall Charge/Credit for all terms.

5. Anticipated Aid: Pending aid, shown for financial aid year.

6. Negative Service indicator: Hold placed on the student account (i.e. student cannot register courses)
   a. Only one icon will display, regardless of how many restrictions have been placed on the record.
   b. Click the negative service indicator to view the details regarding the hold.
   c. Refer to Lesson 4 for additional information on service indicators.

7. FERPA Release icon: If a student has restricted the release of directory information, the FERPA window shade icon will be displayed.

8. Positive Service Indicator: indicates special privileges are available for a student (i.e. student can register early).
   a. Only one icon will display, regardless of how many privileges are applicable. Click the icon for more information.
   b. Refer to Lesson 4 for additional information on service indicators.
9. Click the **Account Details** link to view itemized transactions. The next lesson, Lesson 2, will explore the Account Details page.

10. The links at the bottom of the page may be used to navigate to the following pages:

   a. **Detail Trans** – List of all itemized transactions for all terms
   b. **Item Summary** – List of all activity by each category; such as facility fee
   c. **Items by Term** – Itemized activity for the term in date order
   d. **Items by Date** – List of all transactions in date order; will also list invoices generated
   e. **Due Charges** – System due date for any outstanding charges
   f. **Payment Plans** – Various military, some 3rd party
   g. **View Anticipated Aid** – Lists the type, amount, and application date of financial aid by term yet to disburse. Refer to Lesson 5, Anticipated Aid for additional details.
Lesson 2: Account Details

1. From the Customer Accounts page, click the **Account Details** link.
2. The Account Details will list all charges, financial aid, and payments current to the time of viewing.
   
a. Each transaction can be viewed in detail, reflecting any changes made by date such as:
   
i. Add/drops
   
ii. Increase/decrease of aid
   
iii. Payments or payment reversal

3. Click the **Item Details** link for a transaction to view additional details.
4. For this particular example, the **Item Details** shows:
   - a. Registration changes
   - b. Increasing charges on 7/11, 7/13 and 7/23
   - c. 100% withdrawal 8/21 and re-add on 8/23

5. The bottom portion entitled “**Payments paying this Charge**” indicates the type of payment paying the charge.

![Item Details Table]

![Payments paying this Charge Table]
Lesson 3: Academic Information

1. From the Customer Accounts page, click the Academic Information link.

![Customer Accounts page screenshot]
2. The **Enrollment Summary** page displays. This page shows:

- Class Number
- Subject Number
- Catalog Number
- Session
- Section
- Status
- Reason
- Basis
- Program Units
- Add/Drop Dates for each course registered
  - Add/Drop date is any registration activity up to the calculation for the term, then updated daily thereafter

Students normally register for:
- Spring term around **October**
- Summer term in **March**
- Fall term in **April**

### Enrollment Summary

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<tr>
<th>ID: 2605819</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
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<th>Subject</th>
<th>Catalog Component</th>
<th>Session Census Date</th>
<th>Section</th>
<th>Status</th>
<th>Reason</th>
<th>Basis</th>
<th>Program Units</th>
<th>Add Date</th>
<th>Drop Date</th>
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<td>103</td>
<td>06/09/2013</td>
<td>003</td>
<td>Dropped</td>
<td>Drop</td>
<td>ABCNC</td>
<td>4.00</td>
<td>07/13/2013</td>
<td>07/22/2013</td>
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<td>3100</td>
<td>103</td>
<td>06/09/2013</td>
<td>021</td>
<td>Dropped</td>
<td>Drop</td>
<td>Non-Graded</td>
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<td>07/13/2013</td>
<td>07/22/2013</td>
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<tr>
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<td>3250</td>
<td>200</td>
<td>06/09/2013</td>
<td>005</td>
<td>Dropped</td>
<td>Drop</td>
<td>ABCNC</td>
<td>3.00</td>
<td>07/10/2013</td>
<td>07/22/2013</td>
</tr>
<tr>
<td>71169</td>
<td>3850</td>
<td>100</td>
<td>06/09/2013</td>
<td>801</td>
<td>Enrolled</td>
<td>Enrolled</td>
<td>ABCNC</td>
<td>3.00</td>
<td>08/23/2013</td>
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<td>71169</td>
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<td>Lecture</td>
<td>06/09/2013</td>
<td>801</td>
<td>Enrolled</td>
<td>Enrolled</td>
<td>Developmt</td>
<td>3.00</td>
<td></td>
<td></td>
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<td>2010</td>
<td>52</td>
<td>06/09/2013</td>
<td>044</td>
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<td>Enrolled</td>
<td>Developmt</td>
<td>3.00</td>
<td></td>
<td></td>
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<tr>
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<td>3370</td>
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<td>801</td>
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<td>ABCNC</td>
<td>3.00</td>
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<td>019</td>
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<td>Enrolled</td>
<td>ABCNC</td>
<td>3.00</td>
<td>08/23/2013</td>
<td></td>
</tr>
</tbody>
</table>

3. In the Add/Drop Date section the top date is the **Add** date and the bottom date is the **Drop** date.

4. The **Reason** field provides the reason for the drop (i.e. student request, cancellation, 100% medical, etc.).

5. Click the **Class Info** link to view details regarding the class.
6. The **Class Meeting/Instructor** page is displayed. This page includes the:

   a. Class Number
   b. Subject
   c. Catalog Number
   d. Session
   e. Section
   f. Building and Room number
   g. Start and End Time
   h. Days of the week the class meets
   i. Instructor Name
Lesson 4: Service Indicators

There are two types of Service Indicators:

- **Negative Service Indicators** are used to place a hold on the student’s account. For example, to prevent a student from registering for classes.

- **Positive Service Indicators** are used to indicate special privileges are available for a student, such as early registration.

1. Click the icon to view the details for the service indicator.

2. The Manager Service Indicators page displays. Click the Code to see the details and impact of the service indicator.
3. The details and impact of the indicator are displayed. This includes informational notes, reference, contact, comments, service indicator impacts, date/time placed, and by whom the indicator was placed.
4. The following table identifies some of the most common service indicators and their impact:

<table>
<thead>
<tr>
<th>Code</th>
<th>Name</th>
<th>Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADB</td>
<td>Bad Address Identified</td>
<td>No Refund</td>
</tr>
<tr>
<td>AGS</td>
<td>Selected for Attorney General</td>
<td>No Impact</td>
</tr>
<tr>
<td>ARM</td>
<td>Account Receivable Misc.</td>
<td>No Add/Drops Allowed – Transcript Hold</td>
</tr>
<tr>
<td>DIS</td>
<td>Account Appeal Dispute</td>
<td>No Impact</td>
</tr>
<tr>
<td>ENC</td>
<td>Enrollment Cancellation – for non-payment</td>
<td>Selected for Class Cancellation – No Impact</td>
</tr>
<tr>
<td>ENF</td>
<td>Enrollment Cancelled for non-payment</td>
<td>Classes Cancelled – No Impact</td>
</tr>
<tr>
<td>ENR</td>
<td>Prevent Enrollment</td>
<td>Affects Enrollment</td>
</tr>
<tr>
<td>HRF</td>
<td>Hold Refund</td>
<td>No Refund</td>
</tr>
<tr>
<td>NBL-BANK</td>
<td>Bankruptcy</td>
<td>No Bill or Refund</td>
</tr>
<tr>
<td>NBL-OSAG</td>
<td>Attorney General Collections</td>
<td>No Bill or Refund</td>
</tr>
<tr>
<td>NOP</td>
<td>Non-Payment of Fees</td>
<td>No Add/Drops Allowed – Transcript Hold</td>
</tr>
</tbody>
</table>

Ver. 2014.03.27

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Lesson 5: Anticipated Aid

1. Anticipated Aid appears on the main customer Account page (Lesson 1). To view detailed information on Anticipated Aid, click the “View Anticipated Aid” link at the bottom of the page.

![Customer Accounts](image1)

2. The Anticipated Aid Details page displays. Note the “1 of 2” in the navigation pane, indicating there are two records. The most recent record displays first.

![Anticipated Aid Details](image2)

3. Check the “Apply Date” – this is the date when the aid can disburse to the account as payment. *If the date is past the time of viewing, this would indicate there is an issue.* If this is the case, contact the Office of Student Financial Aid at x7032.
Lesson 6: Tuition Charges

There are variables to the cost of tuition:

- Location (Akron, Summit, Wayne, Off Campus etc.)
- Level (undergraduate, graduate, professional etc.)
- Hours scheduled

Other fees (transportation, course fee, technology fee etc.) may be charged in addition to tuition. Other fees are based on individual characteristics of the student and/or the classes enrolled. A listing of tuition fee charts and other fees are updated on the Student Account website at: [http://www.uakron.edu/student-accounts/costs/](http://www.uakron.edu/student-accounts/costs/).