



VANDERBILT

Business Process Document

PeopleSoft - Student Financials: View Customer Accounts

Department	Student Accounts
Responsibility/Role	SA 9.0 - Student Financials
File Name	
Version	1.0
Document Generation Date	
Date Modified	04/18/2011
Last Changed by	Jeffrey Duly
Status	Active

The purpose of this document is to outline the steps to navigate through the View Customer Accounts screens.

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PeopleSoft - Student Financials: View Customer Accounts



VANDERBILT

Step	Action
1.	Begin by navigating to the Student Financials -> View Customer Accounts link.
2.	Enter VANDU in the Business Unit .
3.	Search on any of the ID (student ID), National ID (SSN), Last Name or First Name fields and click on the Search button. You can search by partial Commodore ID, SSN (in the National ID Field) or Name.



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Business Process Document PeopleSoft - Student Financials: View Customer Accounts

Customer Accounts

Business Unit: VANDU

ID: [Academic Information](#)

Total: 22,681.00

Anticipated Aid: 15,000.00

Account Type	Account Number	Balance	Open Date	Status
Stu Acct	STU001 - 2011 Spring	22,681.00 USD	03/08/2011	Active

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Step	Action
4.	Click on the Account Details link for detailed account activity for the term you choose.

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Account Details

ID: Business Unit: VANDU
 Account Number: STU001 - 2011S Account Balance: 22,681.00

Debits: 22,681.00 Credits: 0.00 Applied: 0.00 Unapplied: 0.00

Item	Term	Amount
ACT & REC FEES-PROF	2011S	193.00 Item Details
	Active	03/08/2011 193.00
INTL STUDENT HEALTH INSUR	2011S	1,071.00 Item Details
	Active	03/08/2011 1,071.00
OGSM TUITION-MBA	2011S	21,417.00 Item Details
	Active	03/08/2011 21,417.00

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Step	Action
5.	Always click the Return link to return to the main Customer Accounts screen.



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Customer Accounts

Business Unit: VANDU

ID:

[Academic Information](#)

Total: 22,681.00

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Account Type	Account Number	Balance	Open Date	Status
Stu Acct	STU001 - 2011 Spring	22,681.00 USD	03/08/2011	Active

Find | View All First 1 of 1 Last

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Step	Action
6.	Click the Detail Trans link for detailed account activity.

Detail Trans

Business Unit:

ID:

Item Description	Item Detail					
Item Nbr	Line Seq Nbr	Term	Account Nbr	Account Term	Item Type	Item Amt
0000000000000001	1	2011 Spring	STU001	2011 Spring	ACT & REC FEES-PROF	193.00
0000000000000002	1	2011 Spring	STU001	2011 Spring	INTL STUDENT HEALTH INSUR	1,071.00
0000000000000003	1	2011 Spring	STU001	2011 Spring	OGSM TUITION-MBA	21,417.00

Customize | Find | View All | First 1-3 of 3 Last

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Customer Accounts

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Account Type	Account Number		Balance	Open Date	Status	
Stu Acct	STU001 - 2011 Spring		22,681.00 USD	03/08/2011	Active	Account Details

Go to: [Detail Trans](#) ⁷ [Item Summary](#) [Items by Term](#) [Items by Date](#) [Due Charges](#) [Payment Plans](#) [View Anticipated Aid](#)

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Step	Action
7.	Click the Item Summary link for a summary of account items.

Item Summary

Business Unit:

ID:

Item Description	Item Due Date					
Item Type	Term	Account Number	Account Term	Item Amt	Balance	
ACT & REC FEES-PROF	2011 Spring	STU001	2011 Spring	193.00	193.00	
INTL STUDENT HEALTH INSUR	2011 Spring	STU001	2011 Spring	1,071.00	1,071.00	
OGSM TUITION-MBA	2011 Spring	STU001	2011 Spring	21,417.00	21,417.00	

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Customer Accounts

Business Unit: VANDU

ID: [Academic Information](#)

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Account Type	Account Number	Balance	Open Date	Status
Stu Acct	STU001 - 2011 Spring	22,681.00 USD	03/08/2011	Active

Account Details

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Step	Action
8.	Click the Items by Term link for a summary of account items grouped by term.

Items By Term

Business Unit: VANDU

ID:

Term	Total Credits	Total Debits	Antic Aid	Total	Total Incl Antic Aid
2011S	0.00	22,681.00	0.00	22,681.00	22,681.000

Item Type	Date Posted	Item Effective Date	Line Total	Item Balance
ACT & REC FEES-PROF	03/08/2011	03/08/2011	193.00	193.00
INTL STUDENT HEALTH INSUR	03/08/2011	03/08/2011	1,071.00	1,071.00
OGSM TUITION-MBA	03/08/2011	03/08/2011	21,417.00	21,417.00

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Customer Accounts

Business Unit: VANDU

ID: [Academic Information](#)

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Account Type	Account Number	Balance	Open Date	Status	
Stu Acct	STU001 - 2011 Spring	22,681.00 USD	03/08/2011	Active	Account Details

Go to: [Detail Trans](#) [Item Summary](#) [Items by Term](#) **[Items by Date](#)** [Due Charges](#) [Payment Plans](#) [View Anticipated Aid](#)

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Step	Action
9.	Click on the Items by Date link for a summary of account items sorted by date.

Items By Date

Business Unit: VANDU

ID:

Sort Detail By

Posted Date
 Effective Date
 Bill Date
 Due Date

From Date:
 To Date:

Date Posted	Item Effective Date	Billing Date	Due Date	Item Type	Term	Amount	Total
03/08/2011	03/08/2011		04/30/2011	OGSM TUITION-MBA	2011 Spring	21,417.000	21,417.00
03/08/2011	03/08/2011		04/30/2011	ACT & REC FEES-PROF	2011 Spring	193.000	21,610.00
03/08/2011	03/08/2011		04/30/2011	INTL STUDENT HEALTH INSUR	2011 Spring	1,071.000	22,681.00

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Stu Acct	STU001 - 2011 Spring	22,681.00 USD	03/08/2011	Active	Account Details

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Step	Action
10.	Click on the Due Charges link for a list of account items including the amount remaining due for each item.

Due Charges

Business Unit: VANDU

ID:

By Due Date	Due Date	Due Amount	Total Due
	04/30/2011	22,681.00	22,681.00

By Item	Item Type	Item Term	Account Nbr	Account Term	Due Date	Due Amt	Total Due
	ACT & REC FEES-PROF	2011S	STU001	2011S	04/30/2011	193.00	193.00
	INTL STUDENT HEALTH INSUR	2011S	STU001	2011S	04/30/2011	1,071.00	1,264.00
	OGSM TUITION-MBA	2011S	STU001	2011S	04/30/2011	21,417.00	22,681.00

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Stu Acct	STU001 - 2011 Spring	22,681.00 USD	03/08/2011	Active	Account Details

Go to: [Detail Trans](#) [Item Summary](#) [Items by Term](#) [Items by Date](#) [Due Charges](#) ¹¹ [Payment Plans](#) [View Anticipated Aid](#)

[Return to Search](#) [Notify](#)

Step	Action
11.	Click on the Payment Plans link if the student has a payment plan.

Payment Plan

Business Unit: VANDU

ID:

Contract Nbr	Contract Description	Contract Type	Plan Type	External Org ID	Contract Status

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Stu Acct	STU001 - 2011 Spring	22,681.00 USD	03/08/2011	Active	Account Details

Go to: [Detail Trans](#) [Item Summary](#) [Items by Term](#) [Items by Date](#) [Due Charges](#) [Payment Plans](#) ¹² [View Anticipated Aid](#)

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Step	Action
12.	Click on the View Anticipated Aid link to see any anticipated financial aid for the student.

Anticipated Aid Details

Term:	2010 Fall	Term Total:	15,000.00		
Item Type	Career	Date	Apply Dt	Expire Dt	Net Award
Outside Scholarship #1	GSM	08/27/2010 2:30:26PM	08/27/2010	08/27/2011	15,000.00

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