

# Quick Reference Card – Student Lifecycle Management

## FPL9 Detailed Student Account Balance



**Process:** FPL9 is used to view the detailed account balance for a student.

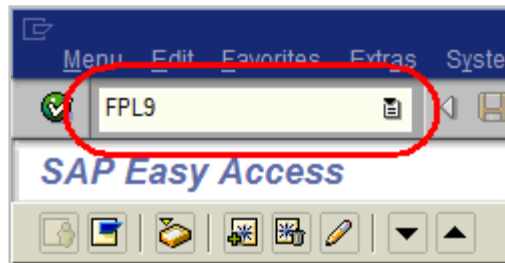
To view just the open (unpaid) balance, use the transaction **PIQST00**.

**Role:** Authorized Users

**Frequency:** When needed

### Displaying Detailed Student Account Balance

Enter the transaction code



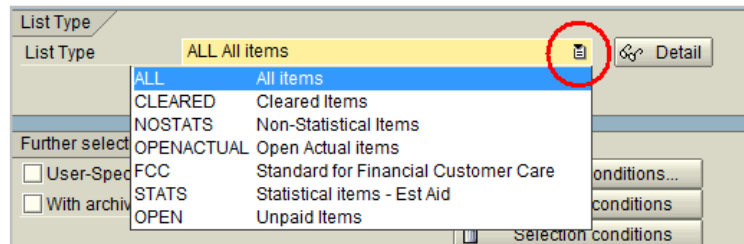
### Account Display: InitScr Screen

Enter the student's ID in **Business Partn.**

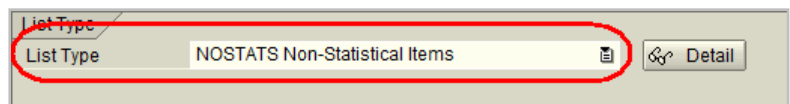


**Note:** The settings listed in this section only need to be selected the first time you access this screen, if you save the settings. The settings will become your default. In the future, you will only need to select the **Business Partn.** (Student's ID).

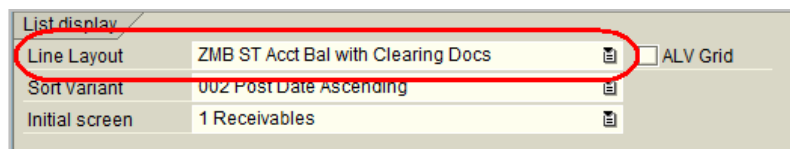
Use the **Drop-down List** icon in each field to make your selections.



In **List Type**, select **Non-Statistical Items**



In **Line Layout**, select **ST Acct Bal with Clearing Docs**



Quick Reference Card – Student Lifecycle Management  
**FPL9 Detailed Student Account Balance**



<p>In <b>Sort Variant</b>, select <b>Post Date Ascending</b></p>	
<p>In <b>Initial Screen</b>, select <b>Receivables</b></p>	
<p>Click <b>Create Selection Conditions</b></p>	
<p>Click in the <b>Main Trans</b> checkbox to display the main transactions for the student</p>	
<p>Click <b>Execute</b></p>	

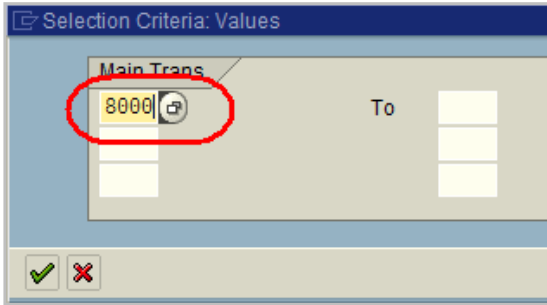
Quick Reference Card – Student Lifecycle Management  
**FPL9 Detailed Student Account Balance**



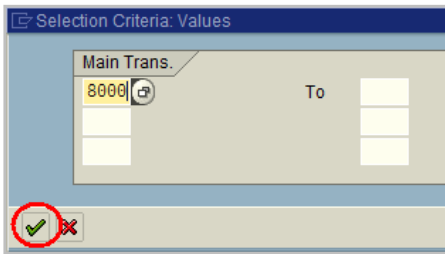
Enter **8000** in the first field to display **Tuition and Mandatory Fee** data

**Note:** Other choices include:

- 9600 – Financial Aid
- 9010 – Athletic Rent/NCAA/Special Requests
- 9400 – Housing
- 9300 – Dining
- 5000 – Refunds (Payments)



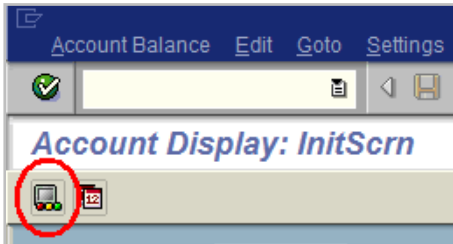
Click **Execute**



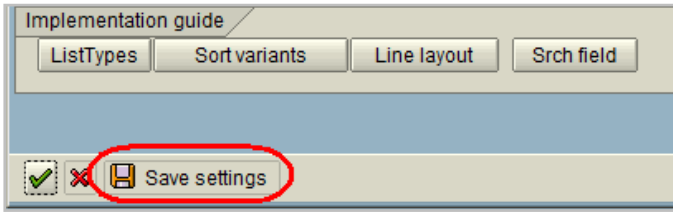
Click **Save Selection Conditions**



Click **Display/Change Settings**

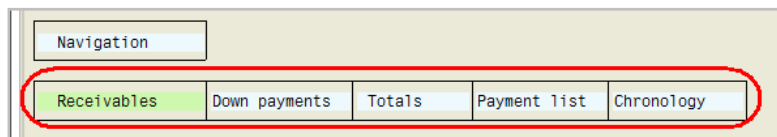


When the **Change Settings** box display, click **Save Settings**



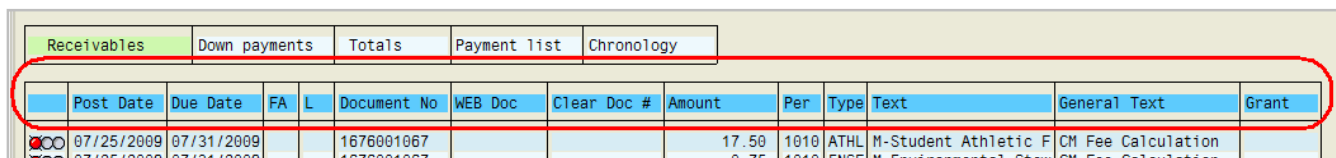
Press **Enter**

**Account Display: Basic List**



Various views are available:

- **Receivables** (default view) – Displays the line items on the account
- **Down Payments** – Not used
- **Totals** – Displays an overview of the account
- **Payment List** – Displays payments that have been made
- **Chronology** – Sorts the line items on the account by due date



Navigation													
Receivables													
Down payments													
Totals													
Payment list													
Chronology													
	Post Date	Due Date	FA	L	Document No	WEB Doc	Clear Doc #	Amount	Per	Type	Text	General Text	Grant
OO	07/25/2009	07/31/2009			1676001067			17.50	1010	ATHL	M-Student Athletic F	CM Fee Calculation	
OO	07/25/2009	07/31/2009			1676001067			0.75	1010	ENSE	M-Environmental Stew	CM Fee Calculation	

Column fields:

- **Status** – Status indicators; Red means the receivable is open (unpaid) and due; Yellow means the item is due today; Green means the item is not due
- **Post Date** – Date the transaction was posted to the student’s account
- **Due Date** – Date the payment is due; in most cases, the posting and due dates are the same
- **FA – Z** - Estimated Aid; **R** – Financial Ombudsman
- **L** – Lock; locks are placed on the account for 30 days if an adjustment is made
- **Document No** – SLCM document number for the item posted to the student’s account
- **WEB Doc** – Credit card payment via web (Biller Direct)
- **Clear Doc #** - Indicates charge is paid
- **Amount** - Original amount of the transaction before anything was cleared
- **Per** – Period key; some transactions will be assigned an identifier to indicate the period in which they were posted; Example: 1030, the 10 specifies 2010 and the 30 specifies Spring semester
- **Type** – The code for the transaction type
- **Text** – The specific type of transaction
- **General Text** – A brief description of the transaction

<p><b>Mandatory Fee Object Types</b></p>	<ul style="list-style-type: none"> <li>• <b>TUIT</b> – Tuition</li> <li>• <b>SPEC</b> – Program &amp; Course Fees</li> <li>• <b>HOUS</b> – Housing</li> <li>• <b>DINI</b> – Dining</li> <li>• <b>INHI</b> – International Student Health Insurance</li> <li>• <b>SSER</b> – Student Services</li> <li>• <b>SACT</b> – Student Activity Board</li> <li>• <b>SGOV</b> – Student Government</li> <li>• <b>TECH</b> – Technology Fee</li> <li>• <b>WRFL</b> – WRFL</li> <li>• <b>SECT</b> – Seaton Center Fee</li> <li>• <b>SCTR</b> – Student Center Fee</li> <li>• <b>SHEA</b> – Student Health Fee</li> <li>• <b>INTL</b> – International Study Abroad Fee</li> <li>• <b>ATHL</b> – Athletic Fee</li> <li>• <b>STVF</b> – Student Involvement Fee</li> <li>• <b>ENSF</b> – Environmental Stewardship Fee</li> </ul>
<p><b>FPL9 Locks</b></p>	<ul style="list-style-type: none"> <li>• <b>A</b> – Athletics</li> <li>• <b>E</b> – Employee Tuition Waivers</li> <li>• <b>F</b> – Financial Aid</li> <li>• <b>G</b> – Graduate School</li> <li>• <b>H</b> – Housing</li> <li>• <b>I</b> – International Student Affairs</li> <li>• <b>K</b> – Kentucky War Orphans</li> <li>• <b>L</b> – LCC/KCTCS</li> <li>• <b>M</b> – Minority Affairs</li> <li>• <b>N</b> – Block Automatic Refunds</li> <li>• <b>O</b> – Biller Direct Overpayments</li> <li>• <b>R</b> – Refund lock credit balance (SBS only)</li> <li>• <b>S</b> – Student Billings</li> <li>• <b>T</b> – Third Party Billings</li> </ul>