



# SLCM\_CA\_310

## Display Student Account Balance



### Course Content



- Introduction
- Unit 1 – PIQST00 Account Balance Display
- Unit 2 – FPL9 Account Display
- Course Summary

## Prerequisites and Roles



- Prerequisites
  - ♦ UK\_100 IRIS Awareness & Navigation
  - ♦ SLCM\_200 Student Lifecycle Management Overview
  
- Roles
  - ♦ Student Lifecycle Management End Users
  - ♦ Admission/Registrar Office

## Student Account Balance

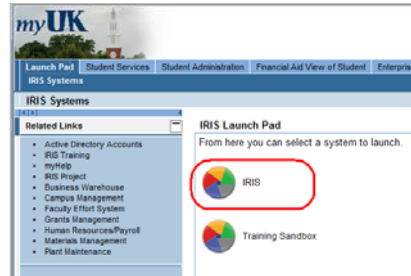


- In order to access student account balances, you need:
  - ♦ To be designated as a person with the responsibility to view student account balances.
  - ♦ To complete the SLCM\_CA\_310 Student Account Balance course and pass the assessment.
  - ♦ To sign the Statement of Responsibility (SOR) form.
    - Information about the SOR is located at [http://www.uky.edu/IRIS/train/SOR\\_Information.html](http://www.uky.edu/IRIS/train/SOR_Information.html).
    - If you have signed your SOR in the past, you do not need to sign it again.
  
- If you do not have access, please work with your college contact to get this access assigned.
  - ♦ The college contact list is located at <http://www.uky.edu/IRIS/news/designatedcontacts.html>.

## Student Account Balance



- To display student account balances, you will need to log into the *myUK* portal and click on **IRIS**.



## Unit 1



Receivables											
Down payments			Totals			Payment list			Chronology		
Post Date	Due Date	Doc #	Confirm #	Total Amount	Open Items	Type	Rep	Grant	Transaction Type	Description	
11/16/2009	11/30/2009	2719001092		17.40	17.40	SECT	1020		R-Student Center Fee	CH Fee Calculation	
11/16/2009	11/30/2009	2719001092		19.05	19.05	SECT	1020		R-Johnson Center Fee	CH Fee Calculation	
11/16/2009	11/30/2009	2719001092		10.00	10.00	SPEC	1020		Statistics Lab Fee	CH Fee Calculation	
11/16/2009	11/30/2009	2719001092		2.85	2.85	SSEB	1020		R-Student Services Fee	CH Fee Calculation	
11/16/2009	11/30/2009	2719001092		3.60	3.60	STVP	1020		R-Student Involvement	CH Fee Calculation	
11/16/2009	11/30/2009	2719001092		23.10	23.10	TECH	1020		R-Technology Fee	CH Fee Calculation	
11/16/2009	11/30/2009	2719001092		930.00	930.00	TUIT	1020		Tuition Fees	CH Fee Calculation	
Receivables				USD	0.00	1,006.00					

# PIQST00 Student Account

## Unit 1 – PIQST00 Student Account

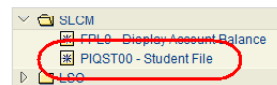
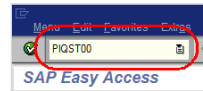


- PIQST00
- Student Search
- FERPA
- Student Account Balance

## PIQST00



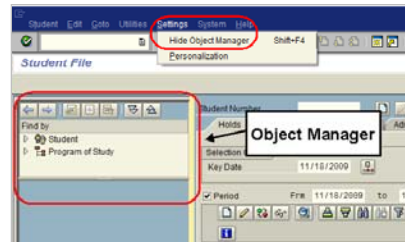
- **PIQST00** is used to view unpaid (open) student account balances.
  - You can access **PIQST00** by either:
    - Typing **PIQST00** in the **Command** field;
- OR**
- Clicking on **PIQST00** in your **Favorites**.



## PIQST00



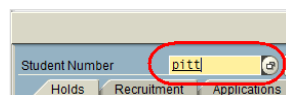
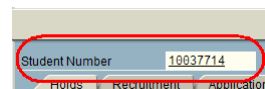
- If the **Object Manager** is open, close it by using the menu **Settings → Hide Object Manager**.
- **Note:** The Object Manager is typically not used. Hiding it, therefore, creates more room on your screen.



## Student Search



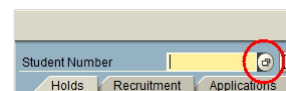
- To search for a student
    - ♦ Enter the **Student Number**;
- OR**
- ♦ Enter the last name in the **Student Number** field, press **Enter**, and then double-click on the name;



Object ab...	Object name	Start date	End Date
10002553	Pittman, Adam	01/01/1900	12/31/9999
10037714	Pitt, Derek	01/01/1900	12/31/9999
10027715	Pitt, Eric	01/01/1900	12/31/9999
10037715	Pitt, Kelle	01/01/1900	12/31/9999
10037656	PITT, DEREK	01/01/1900	12/31/9999

**OR**

- ♦ Use the **Possible Entries** icon to search.



## Student Search



- If using **Possible Entries** to search, use the **Personal Data** search tab.



- ♦ Once chosen, it becomes the default tab.

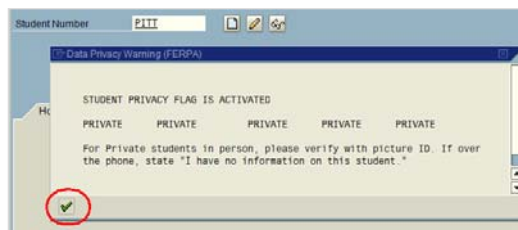
- Enter the search information and then click **Continue**.

- ♦ When the list of students appears, double-click on the student's name.

## FERPA



- Students may place privacy flags on their records.
- When records are accessed, the **Data Privacy Warning (FERPA)** window displays.

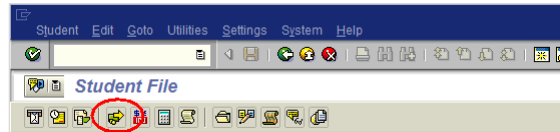


- If message displays, no information can be released on the student, not even to the student unless the student provides a picture ID.
- Close the window by clicking **Continue** or pressing **Enter**.

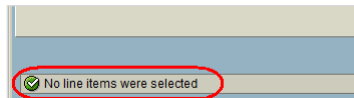
## Account Balance Icon



- To view open (unpaid) account items, click **Account Balance**.



- If you click the icon and the student has no open (unpaid) items, you will remain on the **Student File** screen and receive a system message.



## Account Balance Display



- If the student has open (unpaid) items, the **Account Display** screen appears.

Account Display: Basic List

Partner: 000000 / Company Code: UK00  
Lexington

Receivables | Down payments | Totals | Payment list | Chronology

	Post Date	Due Date	Doc #	Confir #	Total Amount	Open Items	Type	Per	Spent	Transaction Type	Description
Red	11/16/2009	11/30/2009	2719001002		17.40	17.40	SECTN	1020		M-Student Center Fee	CR Fee Calculation
Red	11/16/2009	11/30/2009	2719001002		19.05	19.05	SECTN	1020		M-Johnson Center Fee	CR Fee Calculation
Red	11/16/2009	11/30/2009	2719001002		10.00	10.00	SPEC	1020		Statistics Lab Fee	CR Fee Calculation
Red	11/16/2009	11/30/2009	2719001002		2.05	2.05	SECTN	1020		M-Student Services Fee	CR Fee Calculation
Red	11/16/2009	11/30/2009	2719001002		3.60	3.60	STVP	1020		M-Student Involvement	CR Fee Calculation
Red	11/16/2009	11/30/2009	2719001002		23.10	23.10	TECH	1020		M-Technology Fee	CR Fee Calculation
Red	11/16/2009	11/30/2009	2719001002		930.00	930.00	TUIT	1020		Tuition Fees	CR Fee Calculation
	Receivables	USD			0.00	1,006.00					

- Status Indicators mean:
  - Red = the item is open (unpaid) and due
  - Yellow = the item is due today
  - Green = the item is not due

## Student Billing Holds



- Only Student Billing's holds show on this screen.

Partner 0010001551 / Company Code UK90											
Thomas Adm											
.....											
HOLDS											
.....											
HOLDG		Begin Date		End Date							
Acct Data Not Updated		12/19/2006		12/31/9999							
.....											
Receivables   Down payments   Totals   Payment list   Chronology											
.....											
	Post Date	Due Date	Doc #	Confirm #	Total Amt	Open	Type	Per	Grant	Transaction Type	Description
CO	09/10/2005	09/10/2005	2000004		75.00	75.00				Acceptance Request	Season Football Ticket
CO	01/24/2007	01/24/2007	2000007		5,000.00	5,000.00		0710		Test	Kentucky Yearbook
Receivables   USD					0.00	5,075.00					

- Other holds may be seen on the **Holds** tab on the **Student File** screen.

## Account Balance Tabs



- Account Balance Tabs include:
  - Receivables – Shows open (unpaid) items on the account
  - Down Payments – Not used
  - Totals – Shows an overview of the account
  - Payment List – Shows payments that have been made
  - Chronology – Shows line items sorted by due date

Receivables   Down payments   Totals   Payment list   Chronology											
	Post Date	Due Date	Doc #	Confirm #	Total Amount	Open Items	Type	Per	Grant	Transaction Type	Description
CO	11/16/2009	11/30/2009	2719001892		17.40	17.40	SECT	1020		n-Student Center Fee	CH Fee Calculation
CO	11/16/2009	11/30/2009	2719001892		19.05	19.05	SECT	1020		n-Johnson Center Fee	CH Fee Calculation
CO	11/16/2009	11/30/2009	2719001892		10.00	10.00	SPEC	1020		Statistics Lab Fee	CH Fee Calculation
CO	11/16/2009	11/30/2009	2719001892		2.85	2.85	SSER	1020		n-Student Services F	CH Fee Calculation
CO	11/16/2009	11/30/2009	2719001892		3.60	3.60	STVF	1020		n-Student Involvement	CH Fee Calculation
CO	11/16/2009	11/30/2009	2719001892		23.10	23.10	TECH	1020		n-Technology Fee	CH Fee Calculation
CO	11/16/2009	11/30/2009	2719001892		930.00	930.00	TUIT	1020		Tuition Fees	CH Fee Calculation
Receivables   USD					0.00	1,006.00					



## FPL9 Column Fields



Receivables		Down payments	Totals	Payment list	Chronology						
	Post Date	Due Date	Doc #	Confirm #	Total Amount	Open Items	Type	Per	Grant	Transaction Type	Description
COO	11/16/2009	11/30/2009	2719001892		17.40	17.40	SCTR	1020		R-Student Center Fee	CH Fee Calculation
COO	11/16/2009	11/30/2009	2719001892		19.05	19.05	SECT	1020		R-Johnson Center Fee	CH Fee Calculation
COO	11/16/2009	11/30/2009	2719001892		10.00	10.00	SPEC	1020		Statistics Lab Fee	CH Fee Calculation

- **Status** – Status indicators; Red = item open (unpaid) and due; Yellow = item due today; Green = item not due
- **Post Date** – Date transaction was posted to account
- **Due Date** – Date payment is due
- **Doc #** – SLCM document number for item posted to account
- **Confirmation Number** – Number assigned by the system when a student pays via the web (Biller Direct)
- **Total Amount** – Original amount of the transaction before anything was cleared

## FPL9 Column Fields



Receivables		Down payments	Totals	Payment list	Chronology						
	Post Date	Due Date	Doc #	Confirm #	Total Amount	Open Items	Type	Per	Grant	Transaction Type	Description
COO	11/16/2009	11/30/2009	2719001892		17.40	17.40	SCTR	1020		R-Student Center Fee	CH Fee Calculation
COO	11/16/2009	11/30/2009	2719001892		19.05	19.05	SECT	1020		R-Johnson Center Fee	CH Fee Calculation
COO	11/16/2009	11/30/2009	2719001892		10.00	10.00	SPEC	1020		Statistics Lab Fee	CH Fee Calculation

- **Open Items** – Unpaid balance of the transaction
- **Type** – The code for the transaction type
- **Per** – Period key; first two digits refer to academic year; last two digits refer to academic session
- **Grant** – The type of financial aid that is posted to a student's account
- **Transaction type** – The specific type of transaction
- **Description** – A brief description of the transaction

## Unit 2



Navigation										
Receivables	Down payments	Totals	Payment list	Chronology						
Post Date	Due Date	PA	Document No	MB Doc	Clear Doc #	Amount	Par	Type	Text	General Text
08/16/2009	08/31/2009		1632001421		2000361071	4.50		1010	INTL R-International Fee	CR Fee Calculation
08/26/2009	08/31/2009		1635001018		2100076595	10.20		1010	SPEC Bus & Econ Course/Pr	CR Fee Calculation
08/11/2009	08/31/2009		1646001457		2000361071	255.00		1010	SPEC Bus & Econ Course/Pr	CR Fee Calculation
08/11/2009	08/31/2009		1646001457		2000361071	17.50		1010	ATHL R-Student Athletic F	CR Fee Calculation
08/12/2009	08/31/2009		1671001139		2000361071	0.75		1010	ENGF R-Environmental Stew	CR Fee Calculation
08/27/2009	08/27/2009		10158032		10158032	5,705.00		1010	TUIT Alternative Loan EPT	Outgoing Payment
08/19/2009	08/19/2009		1412133059		2000361071	4,434.00		1010	TUIT Alternative Loan EPT	Alternative Loan
08/19/2009	08/19/2009		1412133059		2100076559	10.20		1010	TUIT Alternative Loan EPT	Alternative Loan
08/19/2009	08/19/2009		1412133059		10158032	5,705.00		1010	TUIT Alternative Loan EPT	Alternative Loan
08/16/2009	07/31/2009		1632001422		2300667716	4.50		1010	INTL R-International Fee	CR Fee Calculation
08/11/2009	07/31/2009		1646001458		2200151622	17.50		1010	ATHL R-Student Athletic F	CR Fee Calculation
08/11/2009	07/31/2009		1646001458		2300151622	204.00		1010	SPEC Bus & Econ Course/Pr	CR Fee Calculation
08/12/2009	07/31/2009		1671001140		2300665447	0.75		1010	ENGF R-Environmental Stew	CR Fee Calculation
07/25/2009	07/31/2009		1676001067		2000361071	9.50		1010	SECT R-Student Services F	CR Fee Calculation
07/25/2009	07/31/2009		1676001067		2000361071	65.00		1010	SECT R-Student Center Fee	CR Fee Calculation
07/25/2009	07/31/2009		1676001067		2300667716	4.50		1010	INTL R-International Fee	CR Fee Calculation
07/25/2009	07/31/2009		1676001067		2300151622	204.00		1010	SPEC Bus & Econ Course/Pr	CR Fee Calculation
07/25/2009	07/31/2009		1676001067		2000361071	11.75		1010	SACT R-Student Activity F	CR Fee Calculation
07/25/2009	07/31/2009		1676001067		2000361071	3,724.40		1010	TUIT Tuition Fees	CR Fee Calculation
07/25/2009	07/31/2009		1676001067		2000361071	60.50		1010	SECT R-Student Center Fee	CR Fee Calculation
07/25/2009	07/31/2009		1676001067		2000361071	100.00		1010	SECT R-Student Health Ser	CR Fee Calculation

# FPL9 Detailed Account Display

## Unit 2 - FPL9 Detailed Account Display

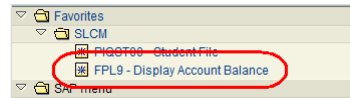
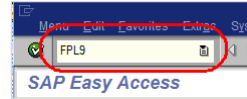


- FPL9 Account Display
- Recommended Settings
- Detailed Account Display
- Examples

## FPL9 Account Display



- To see detailed account information for a student use transaction code **FPL9**.



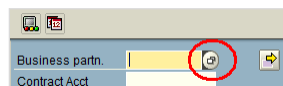
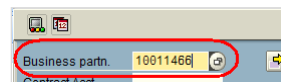
- When the screen initially displays, you will need to set up your recommended settings.



## FPL9 Account Display



- If you know the student number, enter it in the **Business Partn.** Field.
- If the student number is unknown, use **Possible Entries** icon to search for the student.



- Always use **Partner by Student** to perform an **FPL9** search.



## Recommended Settings



- Select these settings when using FPL9.

- List Type: Non-Statistical Items

- Line Layout: ST Acct Bal with Clearing Docs

- Sort Variant: Post Date Descending

- Initial Screen: Receivables

## Selection Conditions



- In the Further Selections area, click on **Create Selection Conditions**.

- When the **Selection Criteria: Field List** appears, select the fields you want to view.

- Main Trans = Main Transactions

- After selecting, press **Enter** or click on **Continue**.

## Selection Conditions



- Enter your selection criteria values.
  - ♦ Suggested values are listed on the next slide.
  - ♦ To see other options, click on **Possible Entries**.
- After you have entered your values, click **Execute**.

## Main Transactions

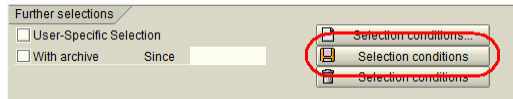


Main Trans	Description	Department/Reason	Contact
8000	Tuition & Mandatory Fees	Student Billings/ Fee Calculation	257-3406
9600	Financial Aid	Financial Aid	257-3172
9010	Athletic Rent/NCAA/Special Requests	Athletics Department	257-3838
9400	Housing	Housing	257-1866
9300	Dining	Food Services	257-6159
5000	Refunds	Student Billings/ Payments	257-3406

## Saving Settings



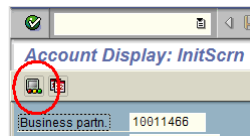
- To save your selection conditions, click **Save Selection Conditions**.



- A system message will display.



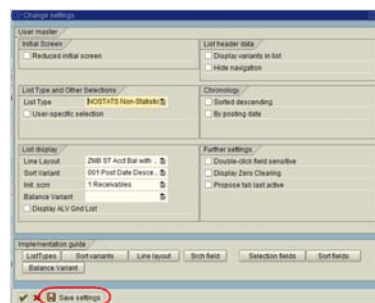
- To save your other settings, click **Display/Change Settings**.



## Saving Settings



- When the **Change Settings** window displays, click **Save Settings**.



- Your settings will be saved for the next time you use FPL9.
  - You may change your settings to view different information for a student by following the previous steps. If you do not save the changes, you will not change your default settings.

## Detailed Account Balance



- To see the student's detailed account balance, press **Enter**.
  - If the student's account has a privacy flag, you will need to press **Enter** to close the FERPA message.
- The detailed account balance will be displayed for the student.

Navigation													
Receivables		Down payments		Totals		Payment list		Chronology					
	Post Date	Due Date	FA	L	Document No	MEB Doc	Clear Doc #	Amount	Per	Type	Text	General Text	Grant
	08/27/2009	08/27/2009			10159882		10159882	5,705.80	1010	TUIT	Alternative Loan EFT	Outgoing Payment	VA44
CO	08/26/2009	08/31/2009			1635001010		2100076550	10.20	1010	SPEC	Bus & Econ Course/Pr	CM Fee Calculation	
	08/19/2009	08/19/2009			1412133059		10159882	5,705.80	1010	TUIT	Alternative Loan EFT	Alternative Loan	VA44
	08/19/2009	08/19/2009			1412133059		2000361071	4,434.00	1010	TUIT	Alternative Loan EFT	Alternative Loan	VA44
CO	08/18/2009	08/19/2009			1412133059		2100076550	10.20	1010	TUIT	Alternative Loan EFT	Alternative Loan	VA44
CO	08/18/2009	08/31/2009			1632001421		2000361071	4.50	1010	INTL	M-International Fee	CM Fee Calculation	
	08/16/2009	07/31/2009			1632001422		2300067716	4.50	1010	INTL	M-International Fee	CM Fee Calculation	
CO	08/12/2009	08/31/2009			1671001139		2000361071	0.75	1010	ENSP	M-Environmental Stew	CM Fee Calculation	
	08/12/2009	07/31/2009			1671001140		2300065447	0.75	1010	ENSP	M-Environmental Stew	CM Fee Calculation	
CO	08/11/2009	08/31/2009			1646001457		2000361071	255.00	1010	SPEC	Bus & Econ Course/Pr	CM Fee Calculation	
CO	08/11/2009	08/31/2009			1646001457		2000361071	17.50	1010	ATHL	M-Student Athletic F	CM Fee Calculation	

## FPL9 Tabs



- The FPL9 Tabs are the same as seen on PIQST00.
  - Receivables** – Shows open (unpaid) items on the account
  - Down Payments** – Not used
  - Totals** – Shows an overview of the account
  - Payment List** – Shows payments that have been made
  - Chronology** – Shows line items sorted by due date

Navigation													
Receivables		Down payments			Totals		Payment list		Chronology				
	Post Date	Due Date	FA	L	Document No.	MEB Doc	Clear Doc #	Amount	Per	Type	Text	General Text	Grant
CC	08/27/2009	08/27/2009			10159882		10159882	5,705.80	1010	TUIT	Alternative Loan EFT	Outgoing Payment	VA44
	08/26/2009	09/31/2009			1635001010		2100076550	10.20	1010	SPEC	Bus & Econ Course/Pr	CM Fee Calculation	VA44
	08/19/2009	08/19/2009			1412133059		10159882	5,705.80	1010	TUIT	Alternative Loan EFT	Alternative Loan	VA44
	08/19/2009	08/19/2009			1412133059		2000361071	4,434.00	1010	TUIT	Alternative Loan EFT	Alternative Loan	VA44

## FPL9 Column Fields



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
08/27/2009	08/27/2009			10159882		10159882	5,705.80	1010	TUIT	Alternative Loan EFT	Outgoing Payment	VA44

- **Status** – Status indicators; Red = open (unpaid) and due; Yellow = item due today; Green = item not due
- **Post Date** – Date transaction was posted to account
- **Due Date** – Date payment is due
- **FA** – Z = Estimated aid; R = Financial ombudsman
- **L** – Lock; locks are placed on account for 30 days if adjustment is made
- **Document No** – SLCM document number for item posted to account
- **WEB Doc** – Credit card payment via web (Biller Direct)

## FPL9 Column Fields



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
08/27/2009	08/27/2009			10159882		10159882	5,705.80	1010	TUIT	Alternative Loan EFT	Outgoing Payment	VA44

- **Clear Doc #** – Indicates charge is paid
- **Amount** – Original amount of the transaction before anything was cleared
- **Per** – Period key; first two digits refer to academic year; last two digits refer to academic session
- **Type** – The code for the transaction type
- **Text** – The specific type of transaction
- **General Text** – A brief description of the transaction



## Mandatory Fees – Object Types

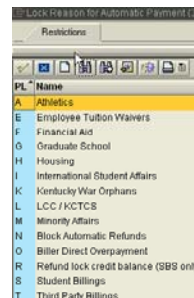


- **TUIT** – Tuition
- **SPEC** – Program & Course Fees
- **HOUS** – Housing
- **DINI** – Dining
- **INHI** – International Student Health Insurance
- **SSER** – Student Services
- **SACT** – Student Activity Board
- **SGOV** – Student Government
- **ATHL** – Athletic Fee
- **TECH** – Technology Fee
- **WRFL** – WRFL
- **SECT** – Seaton Center Fee
- **SCTR** – Student Center Fee
- **SHEA** – Student Health Fee
- **INTL** – International Study Abroad Fee
- **STVF** – Student Involvement Fee
- **ENSF** – Environmental Stewardship Fee

## FPL9 Locks



- If there is an adjustment, a lock is put on an account for 30 days.
- The lock may be made for several reasons.



Receivables		Down payments		Totals		Payment Hist		Chronology			
Post Date	Due Date	FY	Doc No	WEB DOC	STEAR DOC #	Amount	Per	Type	Text	General Text	Grant
07/14/2006	07/14/2006	S	917925		2000107575	531.50				Payment On Account	
08/07/2007	08/07/2007	S	938544		2200024758	843.45				Payment On Account	
08/26/2008	08/26/2008	S	540022776		2000147655	1,019.75				Payment On Account	
01/22/2007	01/22/2007	S	540032541		2000265932	1,724.00				Payment On Account	
08/13/2007	08/13/2007	S	540040202		2200030176	3,416.00				Payment On Account	
01/02/2007	01/02/2007	F	240430696		2000220978	750.00	0730	TUIT	UK One-Year Grant (I	Scholarships Undergr	IBF1
01/26/2008	01/26/2008		02021		10013073	500.00			Payment Request	Plus Account	
01/12/2008	01/12/2008		205059		2000044893	500.00			Acceptance Request	Plus Account	
01/13/2008	01/13/2008		205251		2000050753	500.00			Acceptance Request	Plus Account	
01/13/2008	01/13/2008		205252		2000050753	500.00			Acceptance Request	Plus Account	
01/13/2008	01/13/2008		205253		2000050753	500.00			Acceptance Request	Plus Account	

## Examples



- The following three slides provide examples you may see when displaying student account balances.
  - Example 1 - Dropped Class
  - Example 2 - Open Charges
  - Example 3 - 100% Cancellation

Account Display: Basic List

Partner: Lexington Company Code: 0000

Navigation: Search, Print, Totals, Payment List, Download

Post Date	Due Date	FA	L	Document No	WEB Doc	Clear Doc #	Amount	Per	Type	Text	General Text	Grant
05/24/2000	05/31/2000			1600006461		2300028409	1,626.00	0052	TUIT	Tuition Fees	CR Fee Calculation	
05/24/2000	05/31/2000			1600006461		2300028409	46.20	0052	TECH	M-Technology Fee	CR Fee Calculation	
05/24/2000	05/31/2000			1600006461		2300028409	5.22	0052	SSER	M-Student Services F	CR Fee Calculation	
05/24/2000	05/31/2000			1600006461		2100029479	90.00	0052	SPEC	Engineering Course F	CR Fee Calculation	
05/24/2000	05/31/2000			1600006461		2300028409	34.00	0052	SECT	M-Student Center Fee	CR Fee Calculation	
05/24/2000	05/31/2000			1600006461		2300028409	31.00	0052	SECT	M-Student Center Fee	CR Fee Calculation	
06/05/2000	05/31/2000	N		1614004234		2100029479	90.00	0052	SPEC	Engineering Course F	CR Fee Calculation	
06/05/2000	06/30/2000			1614004233	1234892511	4900064033	45.00	0052	SPEC	Engineering Course F	CR Fee Calculation	
06/10/2000	06/10/2000			1400057620		2300028409	1,742.50	0052	TUIT	EEF Tuition - UK-Und	Employee Education	BACC
06/12/2000	06/12/2000			1400064833	1234892511	4900064833	45.00	0052	SPEC	Engineering Course F	CR Fee Calculation	
06/17/2000	06/17/2000	E		1602000562			7.77	0052	SECT	M-Student Center Fee	CR Fee Calculation	
06/17/2000	06/17/2000	E		1602000562			490.50	0052	TUIT	Tuition Fees	CR Fee Calculation	
06/17/2000	06/17/2000	E		1602000562			11.50	0052	TECH	M-Technology Fee	CR Fee Calculation	
06/17/2000	06/17/2000	E		1602000562			8.52	0052	SECT	M-Johnson Center Fee	CR Fee Calculation	
06/17/2000	06/17/2000	E		1602000562			1.30	0052	SSER	M-Student Services F	CR Fee Calculation	
Credit account USD							435.64					

## Example 1 - Dropped Class



- In this example, one class was dropped, but a payment was made.
- Only the amount for the dropped was posted.

Post Date	Due Date	FA	L	Document No	WEB Doc	Clear Doc #	Amount	Per	Type	Text	General Text	Grant
05/24/2000	05/31/2000			1600006461		2300028409	1,626.00	0052	TUIT	Tuition Fees	CR Fee Calculation	
05/24/2000	05/31/2000			1600006461		2300028409	46.20	0052	TECH	M-Technology Fee	CR Fee Calculation	
05/24/2000	05/31/2000			1600006461		2300028409	5.22	0052	SSER	M-Student Services F	CR Fee Calculation	
05/24/2000	05/31/2000			1600006461		2100029479	90.00	0052	SPEC	Engineering Course F	CR Fee Calculation	
05/24/2000	05/31/2000			1600006461		2300028409	34.00	0052	SECT	M-Student Center Fee	CR Fee Calculation	
05/24/2000	05/31/2000			1600006461		2300028409	31.00	0052	SECT	M-Student Center Fee	CR Fee Calculation	
06/05/2000	05/31/2000	N		1614004234		2100029479	90.00	0052	SPEC	Engineering Course F	CR Fee Calculation	
06/05/2000	06/30/2000			1614004233	1234892511	4900064033	45.00	0052	SPEC	Engineering Course F	CR Fee Calculation	
06/10/2000	06/10/2000			1400057620		2300028409	1,742.50	0052	TUIT	EEF Tuition - UK-Und	Employee Education	BACC
06/12/2000	06/12/2000			1400064833	1234892511	4900064833	45.00	0052	SPEC	Engineering Course F	CR Fee Calculation	
06/17/2000	06/17/2000	E		1602000562			7.77	0052	SECT	M-Student Center Fee	CR Fee Calculation	
06/17/2000	06/17/2000	E		1602000562			490.50	0052	TUIT	Tuition Fees	CR Fee Calculation	
06/17/2000	06/17/2000	E		1602000562			11.50	0052	TECH	M-Technology Fee	CR Fee Calculation	
06/17/2000	06/17/2000	E		1602000562			8.52	0052	SECT	M-Johnson Center Fee	CR Fee Calculation	
06/17/2000	06/17/2000	E		1602000562			1.30	0052	SSER	M-Student Services F	CR Fee Calculation	
Credit account USD							435.64					

## Example 2 – Open Charges



- This account does not have any payments.
- All charges are open (unpaid).

Navigation												
Receivables   Down payments   Totals   Payment list   Chronology												
Post Date	Due Date	FA	L	Document No	MSB Doc	Clear Doc #	Amount	Per	Type	Text	General Text	Grant
11/16/2009	11/30/2009			2719001892			17.40	1020	SECT	M-Student Center Fee	CH Fee Calculation	
11/16/2009	11/30/2009			2719001892			19.05	1020	SECT	M-Johnson Center Fee	CH Fee Calculation	
11/16/2009	11/30/2009			2719001892			10.00	1020	SPEC	Statistics Lab Fee	CH Fee Calculation	
11/16/2009	11/30/2009			2719001892			2.85	1020	SSER	M-Student Services F	CH Fee Calculation	
11/16/2009	11/30/2009			2719001892			3.60	1020	STVF	M-Student Involvement	CH Fee Calculation	
11/16/2009	11/30/2009			2719001892			23.10	1020	TECH	M-Technology Fee	CH Fee Calculation	
11/16/2009	11/30/2009			2719001892			930.00	1020	TUIT	Tuition Fees	CH Fee Calculation	
08/19/2009	08/19/2009			1413132843	10152546		2,024.00	1010	TUIT	Alternative Loan EFT	Autopay Payment	VA44
08/19/2009	08/19/2009			1413132843	10152546		2,024.00	1010	TUIT	Alternative Loan EFT	Alternative Loan	VA44
08/19/2009	08/19/2009			1413132843	2000361236		4,179.00	1010	TUIT	Alternative Loan EFT	Alternative Loan	VA44
08/16/2009	08/31/2009			1690001471	2000361236		0.75	1010	ENGF	M-Environmental Stew	CH Fee Calculation	
08/16/2009	07/31/2009			1690001472	2300069025		0.75	1010	ENGF	M-Environmental Stew	CH Fee Calculation	
08/04/2009	08/31/2009			1636001310	2000361236		17.50	1010	ATHL	M-Student Athletic F	CH Fee Calculation	
08/04/2009	07/31/2009			1636001311	2000358983		17.50	1010	ATHL	M-Student Athletic F	CH Fee Calculation	
07/25/2009	07/31/2009			1677000950	2000358983		17.50	1010	ATHL	M-Student Athletic F	CH Fee Calculation	
07/25/2009	07/31/2009			1677000950	2300069025		0.75	1010	ENGF	M-Environmental Stew	CH Fee Calculation	
07/25/2009	07/31/2009			1677000950	2000361236		4.50	1010	INTL	M-International Fee	CH Fee Calculation	
07/25/2009	07/31/2009			1677000950	2000361236		11.75	1010	SACT	M-Student Activity F	CH Fee Calculation	
07/25/2009	07/31/2009			1677000950	2000361236		69.50	1010	SECT	M-Student Center Fee	CH Fee Calculation	
07/25/2009	07/31/2009			1677000950	2000361236		69.50	1010	SECT	M-Student Center Fee	CH Fee Calculation	

## Example 3 – 100% Cancellation



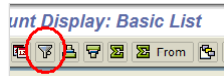
- In this example, the account was reduced by the full amount.
- The student cancelled at 100%.

Navigation												
Receivables   Down payments   Totals   Payment list   Chronology												
Post Date	Due Date	FA	L	Document No	MSB Doc	Clear Doc #	Amount	Per	Type	Text	General Text	Grant
11/11/2009	10/31/2009	N		1000025337			8.70	1010	SECT	M-Student Center Fee	CH Fee Calculation	
11/11/2009	09/30/2009	N		1000025337			9.53	1010	SECT	M-Johnson Center Fee	CH Fee Calculation	
11/11/2009	09/30/2009	N		1000025337			1.43	1010	SSER	M-Student Services F	CH Fee Calculation	
11/11/2009	09/30/2009	N		1000025337			11.55	1010	TECH	M-Technology Fee	CH Fee Calculation	
11/11/2009	09/30/2009	N		1000025337			855.50	1010	TUIT	Tuition Fees	CH Fee Calculation	
11/11/2009	09/30/2009	N		1000025337			1.80	1010	STVF	M-Student Involvement	CH Fee Calculation	
10/31/2009	10/31/2009			5000050209			8.71			Late Payment Fee	Late Payment Fee	
10/30/2009	10/31/2009			1671002345			8.70	1010	SECT	M-Student Center Fee	CH Fee Calculation	
09/23/2009	09/30/2009			1661002213	2000387378		8.70	1010	SECT	M-Student Center Fee	CH Fee Calculation	
09/23/2009	09/30/2009			1661002213			9.53	1010	SECT	M-Johnson Center Fee	CH Fee Calculation	
09/23/2009	09/30/2009			1661002213			1.43	1010	SSER	M-Student Services F	CH Fee Calculation	
09/23/2009	09/30/2009			1661002213			11.55	1010	TECH	M-Technology Fee	CH Fee Calculation	
09/23/2009	09/30/2009			1661002213			855.50	1010	TUIT	Tuition Fees	CH Fee Calculation	
09/23/2009	09/30/2009			1661002213	2000387378		8.70	1010	SECT	M-Student Center Fee	CH Fee Calculation	
09/23/2009	09/30/2009			1661002213			1.80	1010	STVF	M-Student Involvement	CH Fee Calculation	
09/23/2009	09/30/2009			1661002213			19.05	1010	SECT	M-Johnson Center Fee	CH Fee Calculation	
09/23/2009	08/31/2009			1661002214	2300111008		17.40	1010	SECT	M-Student Center Fee	CH Fee Calculation	
09/23/2009	07/31/2009			1661002214	2300111008		2.05	1010	SSER	M-Student Services F	CH Fee Calculation	
09/23/2009	07/31/2009			1661002214	2300111008		23.10	1010	TECH	M-Technology Fee	CH Fee Calculation	
09/23/2009	07/31/2009			1661002214	2300111008		1,311.00	1010	TUIT	Tuition Fees	CH Fee Calculation	
09/23/2009	07/31/2009			1661002214	2300111008		3.60	1010	STVF	M-Student Involvement	CH Fee Calculation	
08/31/2009	08/31/2009			5000047542			16.76			Late Payment Fee	Late Payment Fee	
08/30/2009	08/31/2009			1673001752	2300111008		19.05	1010	SECT	M-Johnson Center Fee	CH Fee Calculation	
08/30/2009	07/31/2009			1673001753	2000372198		19.05	1010	SECT	M-Johnson Center Fee	CH Fee Calculation	
08/30/2009	07/31/2009			1673001753	2000372198		17.40	1010	SECT	M-Student Center Fee	CH Fee Calculation	

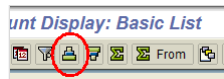
## FPL9 Toolbar



- The most useful icons on the FPL9 toolbar include:



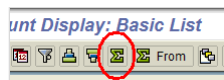
- Filter – used to display certain data



- Sort Ascending – Sorts in ascending order A to Z



- Sort Descending – Sorts in descending order Z to A



- Sum – Sums the amounts in the column

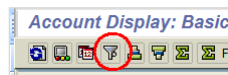
## Filtering



- To filter data, click in the header of the column you want to filter

Amount	Pr	Type	Text
0.75	1010	UNSP	N-Environmental St
0.75	1010	ENGS	N-Environmental St
245.00	1010	SPFC	Bux. & Econ. Course

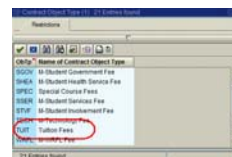
- Click on **Filter**



- Type in the value you want to filter or use the **Possible Entries** to search



- Double-click on your value



## Filtering



- Click **Execute**

- Results will display based on your value

Post Date	Due Date	FA	L	Document No	MS Doc	Clear Doc #	Amount	Per	Type	Text	General Text	Grant
06/27/2009	06/27/2009			10108602		10108602	5,705.00	1010	TUFT	Alternative Loan EFT	Outgoing Payment	VA44
06/19/2009	06/19/2009			141213009		10108602	5,705.00	1010	TUFT	Alternative Loan EFT	Alternative Loan	VA44
06/19/2009	06/19/2009			141213009		2000301071	4,434.00	1010	TUFT	Alternative Loan EFT	Alternative Loan	VA44
06/19/2009	06/19/2009			141213009		2100076500	52.20	1010	TUFT	Alternative Loan EFT	Alternative Loan	VA44
07/25/2009	07/31/2009			1070001067		2000301071	3,724.00	1010	TUFT	tuition Fees	CH Fee Calculation	
07/10/2009	06/30/2009			1090000038		2200130819	885.00	0900	TUFT	tuition Fees	CH Fee Calculation	
06/18/2009	06/30/2009			2710000910		2200130819	885.00	0900	TUFT	tuition Fees	CH Fee Calculation	
06/18/2009	06/30/2009			2710000910		2200137872	885.00	0900	TUFT	tuition Fees	CH Fee Calculation	
06/18/2009	06/30/2009			1802000406		2200137872	885.00	0900	TUFT	tuition Fees	CH Fee Calculation	
07/30/2009	07/30/2009			1413111007		2200121512	750.00	0900	TUFT	FEES Scholarship	Fiscal Year State	GA54-09
12/31/2008	12/31/2008			1630000347		2200004503	3,330.75	0900	TUFT	tuition Fees	CH Fee Calculation	
12/31/2008	12/31/2008			1630000347		2200121512	207.50	0900	TUFT	tuition Fees	CH Fee Calculation	
12/31/2008	12/31/2008			1630000348		2000378711	2,055.00	0900	TUFT	tuition Fees	CH Fee Calculation	
12/26/2008	12/31/2008			2600000097		2000378711	2,055.00	0900	TUFT	tuition Fees	CH Fee Calculation	

- To return to the full account details, click **Back**

## Sorting



- To sort on a particular column, click in the column header

Post Date	Due Date	FA	L	Document No	MS Doc	Clear Doc #	Amount	Per	Type	Text	General Text	Grant
06/12/2009	06/31/2009			1671001130		2000301071	0.75	1010	ENVP	Environmental Steu	CH Fee Calculation	
06/12/2009	07/31/2009			1671001140		2300005447	0.75	1010	ENVP	Environmental Steu	CH Fee Calculation	

- Click on either **Sort Ascending** or **Sort Descending**

- The results will display

Post Date	Due Date	FA	L	Document No	MS Doc	Clear Doc #	Amount	Per	Type	Text	General Text	Grant
07/09/2008	07/09/2008			4500000501		1237208600	4500000501	11.00		Life Payment Fee	Payment On Account	
07/09/2008	07/09/2008			4500000501		1237208600	4500000501	11.45		Life Payment Fee	Payment On Account	
06/30/2008	06/30/2008			5000041440		2300044503	42.83			Life Payment Fee	Life Payment Fee	
06/30/2008	06/30/2008			5000041440		2300044503	42.83			Life Payment Fee	Life Payment Fee	
06/30/2008	06/30/2008			5200012717		2300130809	43.45			Life Payment Fee	Life Payment Fee	
06/30/2008	06/30/2008			5300010896		1237208600	4500000501	11.45		Life Payment Fee	Life Payment Fee	
06/30/2008	06/30/2008			5300012507		1237208600	4500000501	11.60		Life Payment Fee	Life Payment Fee	
11/29/2008	11/27/2008			1000003411		2000020943	12.75	860	ATHL	Athletic Fee/LC/Spri	Pass Thru	
07/26/2008	07/26/2008			1500094409		2000103744	12.75	0710	ATHL	Athletic Fee/LC/Spri	Pass Thru	
12/01/2008	12/01/2008			1501045509		2000044209	12.75	0710	ATHL	Athletic Fee/LC/Spri	Pass Thru	
07/26/2007	07/26/2007			1800013071		2200030170	14.00	080	ATHL	n Student Athletic F	CH Fee Calculation	
12/15/2007	12/30/2007			1801001063		2000010500	14.00	080	ATHL	n Student Athletic F	CH Fee Calculation	
07/26/2008	07/31/2008			1804000649		2200079354	16.50	090	ATHL	n Student Athletic F	CH Fee Calculation	
12/31/2008	12/31/2008			1809001347		2300004023	16.50	090	ATHL	n Student Athletic F	CH Fee Calculation	
06/11/2009	06/31/2009			164001457		2000301071	17.50	1010	ATHL	n Student Athletic F	CH Fee Calculation	
06/11/2009	07/31/2009			164001458		2200101622	17.50	1010	ATHL	n Student Athletic F	CH Fee Calculation	
07/25/2008	07/31/2008			1070001067		2200101622	17.50	1010	ATHL	n Student Athletic F	CH Fee Calculation	

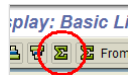
## Sum



- To sum the account transactions, click on the **Type** column header

Per	Type	Text
75	0630	ATHL Athletic

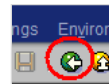
- Click on **Sum**



- Results will display
  - Note the sum is the total for all academic sessions

Academic Session	Student No.	Student Name	Student ID	Student Email	Student Phone	Student Address	Student City	Student State	Student Zip	Student Country	Student Email	Student Phone	Student Address	Student City	Student State	Student Zip	Student Country
2000	0000000000	0000000000	0000000000	0000000000	0000000000	0000000000	0000000000	0000000000	0000000000	0000000000	0000000000	0000000000	0000000000	0000000000	0000000000	0000000000	0000000000

- To return to the full account details, click **Back**



## SLCM Help



- For Quick Reference Cards
  - Click on **Attachment** (upper right corner)
  - Click on QRC
  - Print
- myHelp website:
  - <http://myHelp.uky.edu/rwd/HTML/index.html>
  - Contains Quick Reference Cards (QRCs), updated course manuals, Simulations, Frequently Asked Questions, and other job aids
- IRIS website
  - <http://www.uky.edu/IRIS/>
  - Contains Information Directory, Forms, and other references



## Other SLCM Courses



- Classroom Lab Courses
  - ♦ SLCM\_AD\_300 Event Planning
  - ♦ SLCM\_AD\_340 Program of Study
- WBT Courses are available at myTraining Center
  - ♦ SLCM\_200 Student Lifecycle Management Overview
  - ♦ SLCM\_AD\_310 Student Records
  - ♦ SLCM\_AD\_315 Booking Rules
  - ♦ SLCM\_AD\_320 Booking
  - ♦ SLCM\_WP\_210 Grading
  - ♦ SLCM\_WP\_220 Overrides
  - ♦ SLCM\_WP\_310 Advising

## Course Summary



You now are able to:

- Display the Student Account Balance via the Student File (transaction PIQST00)
- Display detailed student account information using transaction FPL9

## Course Assessment Instructions



- To take the assessment and complete the course, click **Attachments** (upper right corner)
- Click **SLCM\_CA\_310 Assessment & Course Completion** and print the QRC
  - ♦ **Note:** The QRC will open in another window.
- Click **OK** to close the **Attachments** window
- Follow the steps in the QRC to complete the course

