SLCM_CA_310

Display Student Account Balance

IRIS
Integrated Resource
Information System

Course Content

IRIS
Integrated Resource
Information System

- 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
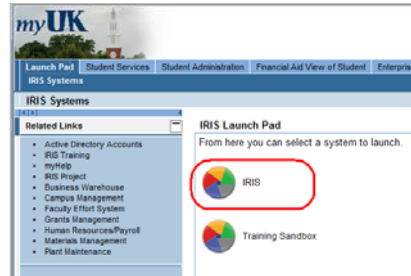 - Admission/Registrar Office

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.
    - 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

PIQST00
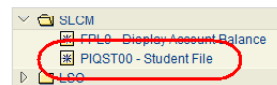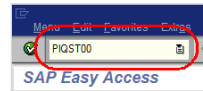# Student Account

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.**

SAP Easy Access

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.
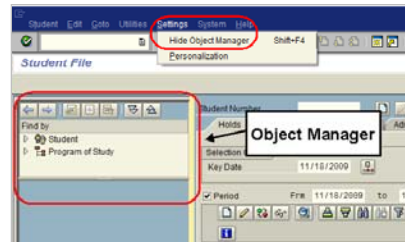
Student Search

- 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;
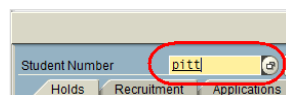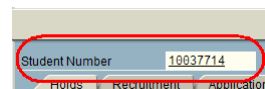
  OR

  - ◆ Use the **Possible Entries** icon to search.
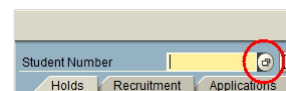
Student Search

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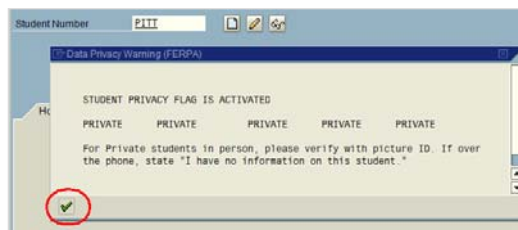
- If message displays, no information can be released on the student, not even to the student unless the student provides a picture ID.
- Close the window by clicking **Continue** or pressing **Enter**.

Account Balance Icon

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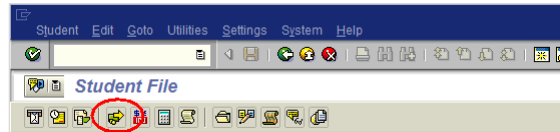
- If you click the icon and the student has no open (unpaid) items, you will remain on the **Student File** screen and receive a system message.

No line items were selected
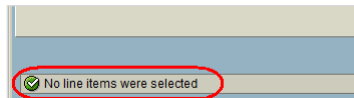
Account Balance Display

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

- 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.

- 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

FPL9 Column Fields

- **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

- **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

FPL9 Detailed
Account Display

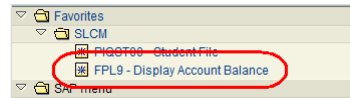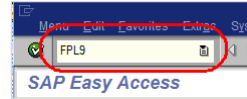Unit 2 – FPL9 Detailed Account Display

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

FPL9 Account Display

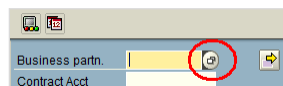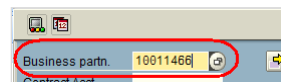- To see detailed account information for a student use transaction code **FPL9.**

- 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

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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**.

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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**.
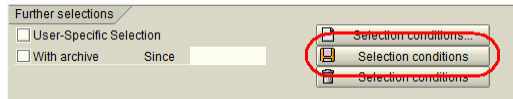
- A system message will display.

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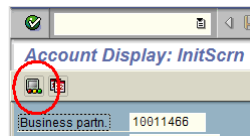
Saving Settings

- When the **Change Settings** window displays, click **Save Settings**.
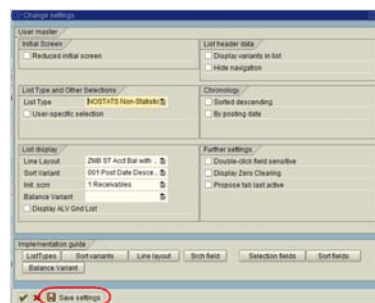
- Your settings will be saved for the next time you use FPL9.

  - 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.

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

FPL9 Column Fields

- **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

- **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.

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

Example 1 – Dropped Class

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

Example 2 – Open Charges

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

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Example 3 – 100% Cancellation

- In this example, the account was reduced by the full amount.
- The student cancelled at 100%.
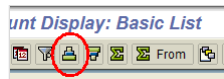
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FPL9 Toolbar

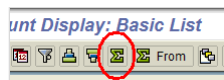- The most useful icons on the FPL9 toolbar include:
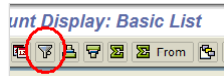
  - Filter – used to display certain data

  - Sort Ascending – Sorts in ascending order A to Z

  - Sort Descending – Sorts in descending order Z to A

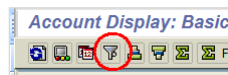 - Sum – Sums the amounts in the column

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Filtering

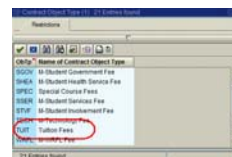- To filter data, click in the header of the column you want to filter

- Click on **Filter**

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

- Double-click on your value

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Filtering

- Click **Execute**

- Results will display based on your value

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

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Sorting

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

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

- The results will display

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Sum

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

- Click on **Sum**
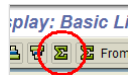
- Results will display
  - Note the sum is the total for all academic sessions

- 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