Posting a Charge to a Student's Account

This guide will cover how to Post a Charge directly to a student's bill.

Step One

Navigate to the Student Post page by using the following breadcrumb:

Step Two

Student Post

Add a New Value

- Make sure UCINN is entered in the Business Unit field. This should default in from your user defaults.
- Click in the ID field and enter the EMPLID of the person needing to be updated. If you don’t know the person’s EMPLID, click on the magnifying glass, where you will be able to search for the person by UCID or name.
Enter the appropriate Account Type, if you know it. Otherwise, click on the magnifying glass next to the Account Type field. Select the appropriate value from the list. Below is a list of Account Types and their intended usage.

- Tuition and Fees (TUT) – Holds all Tuition and Fee-related charges and payments
- Housing Room and Board (HSG) – Holds Room and Board charges and payments
- Other Miscellaneous Fees and Charges (OTH) – Holds charges and payments associated with Metro Bus, Health Services, Student Health Insurance, bookstore vouchers, late registration, collections, writeoffs, returned checks, institutional loans, and enrollment deposit forfeitures
- Excess Aid Credits (EXC) – Holds any Federal or Institutional Aid and waivers in excess of charges
- Excess Personal Payments (EXP) – Holds non financial aid payments in excess of charges
- Tuition Payment Plans (TPP) – Holds Payment Plan installments, Payment Plan administrative fees and payments
- Third Party Contract (TPC) – Will be used only on Corporate Accounts associated with billed to third party/sponsors
- Deposits (DEP) – Holds deposits for future terms, until charges for that term are posted

Click on the magnifying glass next to the Item Type field. Select the appropriate Charge item type value from the list. The list of item types available is based on security access and the account type selected.

Click the Add button. The Student Post page will load.

**Step Three**

![Student Post](image-url)
• Verify the Item type selected and the description of the item type.
• Click in the field next to the Amount label and enter the dollar amount.
• Enter the term to which the transaction should be posted, if you know it. Otherwise, click on the magnifying glass next to the Term field and select the appropriate value from the list.
• Click on the field next to the Reference number label and enter a reference number. This value can be a combination of letters and numbers. It will appear in the item details within the Customer Accounts page.
• Use the Academic Information link to view a summary of the student's academic data such as academic program, academic plan, citizenship, number of enrollment units and actual class enrollments.
• Use the Student Accounts link to review the student's account prior to posting the transaction.
• Click on the Post button to post the transaction to the student's account. Once the Transaction has been process the editable fields will be grayed out.
• Click on the New Transaction button to post a new transaction.

Important:

• **DO NOT change the value in the Item Effective Date field without permission from a Bursar Manager.** If there is a need to change this value, enter the new date or click on the calendar next to the field and select the effective date of the transaction. This value is not the date the transaction posts to Catalyst. The posted date will always use today's date.
• If necessary, enter the appropriate Due Date or click on the calendar next to the Item Due Date Field. Select the due date associated with the transaction. Normal Tuition and Fee charges are due 5 days before the term starts. There are no adjustments for national or UC holidays. Charges posted after this date are due 7 days after posting. **Departmental charges can have different due dates but it is recommended that you leave this field blank and let the monthly billing process assign a due date.**

You have now completed the steps for Posting a Charge to a Student's Account.