Posting a Credit to a Student's Account

This guide will cover how to Post a Credit directly to a Student's Account.

**WARNING:** This guide should not be used if the item type number begins with "8". Item types that begin with the number "8" MUST be entered under Financial Aid via the Assign Departmental Awards page.

**Step One**

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

[Main Menu] > [Campus Solutions] > [Student Financials] > [Charges and Payments] > [Post Student Transaction]

**Step Two**

**Student Post**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit:</td>
<td>UCINN</td>
</tr>
<tr>
<td>ID:</td>
<td></td>
</tr>
<tr>
<td>Account Type:</td>
<td></td>
</tr>
<tr>
<td>Item Type:</td>
<td></td>
</tr>
<tr>
<td>User ID:</td>
<td></td>
</tr>
<tr>
<td>Group Line Time Stamp</td>
<td>11/28/2016 3:26:03PM</td>
</tr>
<tr>
<td>Line Sequence Nbr:</td>
<td>1</td>
</tr>
</tbody>
</table>

- 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:
  o Tuition and Fees (TUT) – Holds all Tuition and Fee-related charges and payments
  o Housing Room and Board (HSG) – Holds Room and Board charges and payments
  o 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
  o Excess Aid Credits (EXC) – Holds any Federal or Institutional Aid and waivers in excess of charges
  o Excess Personal Payments (EXP) – Holds non financial aid payments in excess of charges
  o Tuition Payment Plans (TPP) – Holds Payment Plan installments, Payment Plan administrative fees and payments
  o Third Party Contract (TPC) – Will be used only on Corporate Accounts associated with billed to third party/sponsors
  o 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**
• Verify the Item type select is correct. **If the item type is incorrect, click the New Transaction button to cancel this request and begin a new one.**
• Click in the field next to the Amount label and enter the dollar amount.
• Enter the term code to which the transaction should be posted. If you are unsure of the term code, 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.
• Click on the **Post** button to post the transaction to the student's account. Once the Transaction has been processed the editable fields will be grayed out.
• If necessary, click on the **New Transaction** button to post a new transaction.
• The Academic Information link is available 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.
• The Student Accounts link is also available to review the student's account prior to posting the 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.
• Leave the Due Date field blank.
• **DO NOT change the Charge Priority without permission from a Bursar Manager.**
• **DO NOT change the Exc Acct field without permission from a Bursar Manager.**
• **DO NOT check the Restrict Payment to Account check box without permission from a Bursar Manager.**
• **DO NOT use the Select Charges to Pay link without permission from a Bursar Manager.**

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