

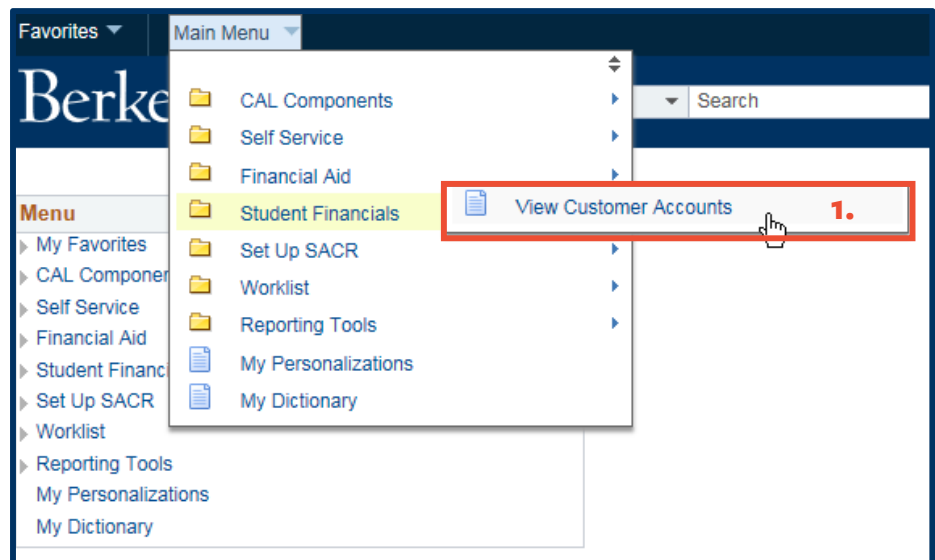
## Viewing Customer Accounts

**PATH: Main Menu > Student Financials > View Customer Accounts**

There are some important points to bear in mind as you view a student's account in *Campus Solutions*.

- A student's record is only viewable once a charge or credit exists on it.
- Beginning Fall 2016, tuition and fees will only be calculated under two conditions:
  - tuition is ready to be calculated (after the UC Regents have met and approved the new fee amounts)
  - the student has enrolled in at least 1 unit
- In CARS, due dates always fell on the 15<sup>th</sup> of a month. Due dates in *Campus Solutions* are dynamic and could fall on any day of the month.

1. After logging in to *Campus Solutions*, click the menu headings, **Main Menu > Student Financials > View Customer Accounts**, to view student accounts.



2. You arrive at the main **Customer Accounts** page.

Once there, enter “UCB01” for **Business Unit**.

The screenshot shows the 'Customer Accounts' search interface. At the top, it says 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this is a 'Find an Existing Value' button. A 'Search Criteria' section is expanded, showing several search fields: Business Unit, ID, National ID, Campus ID, Last Name, and First Name. Each field has a dropdown menu for search criteria (all set to 'begins with') and a search input field. The 'Business Unit' field is highlighted with a red box and has a red '2.' next to it, with 'UCB01' entered in the input field. There is also a 'Case Sensitive' checkbox which is unchecked. At the bottom, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

3. Enter the student's ID.

This screenshot is similar to the previous one, showing the 'Customer Accounts' search page. The 'Business Unit' field now contains 'UCB01'. The 'ID' field is highlighted with a red box and has a red '3.' next to it. The search criteria dropdowns remain set to 'begins with'. The 'Case Sensitive' checkbox is still unchecked. The 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria' buttons are visible at the bottom.

- Click the **Search** button.

**Customer Accounts**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ **Search Criteria**

Business Unit: [=] UCB01

ID: [begins with] [x]

National ID: [begins with]

Campus ID: [begins with]

Last Name: [begins with]

First Name: [begins with]

Case Sensitive

**4.** Search Clear Basic Search Save Search Criteria

- When you arrive at the **Customer Accounts** page, you are shown **All Fees**, which is the total amount due on the account.

**Customer Accounts**

Business Unit: UCB01  
Student, Sonia ID: 26979419 Academic Information ★

Total: 2,340.12 Anticipated Aid: 7,816.32

Find | View All First 1 of 1 Last

Account Type	Account Number	Balance	Open Date	Status
ALLFEES	0000001001 - 2016 Fall	2,340.12 USD	07/23/2016	Active

**5.** Account Details

Go to: Detail Trans Item Summary Items by Term Items by Date Due Charges Payment Plans View Anticipated Aid

Return to Search Notify

- Click on **Account Details** to view the overall details of the account.

**Customer Accounts**

Business Unit: UCB01  
Student, Sonia ID: 26979419 Academic Information ★

Total: 2,340.12 Anticipated Aid: 7,816.32

Find | View All First 1 of 1 Last

Account Type	Account Number	Balance	Open Date	Status
ALLFEES	0000001001 - 2016 Fall	2,340.12 USD	07/23/2016	Active

**6.** Account Details

Go to: Detail Trans Item Summary Items by Term Items by Date Due Charges Payment Plans View Anticipated Aid

Return to Search Notify

7. Click on **View All** to see a list of each transaction.

Account Details				
ID:	26979419	Student,Sonia	Business Unit:	UCB01
Account Number:	0000001001 - 2016 Fall		Account Balance:	2,340.12
Debits:	16,378.25	Credits:	-14,038.13	Applied: 14,038.13 <b>7.</b> Unapplied: 0.00
			Find	<b>View All</b> First 1-3 of 9 Last
Item	Term	Amount		
Class	Installment ID	Last Activity Date	Balance	
Department Award	2016 Fall	09/01/2016	-2,605.44	<a href="#">Item Details</a>
			0.00	
Department Award	2016 Fall	08/15/2016	-2,605.44	<a href="#">Item Details</a>
			0.00	
Department Award	2016 Fall	08/15/2016	-8,827.25	<a href="#">Item Details</a>
			0.00	

8. Click **Item Details** for a specific line item, to view its details, including:

- when the item was assessed to the account
- when it is due
- what payments have been applied to it

Account Details				
ID:	26979419	Student,Sonia	Business Unit:	UCB01
Account Number:	0000001001 - 2016 Fall		Account Balance:	2,340.12
Debits:	16,378.25	Credits:	-14,038.13	Applied: 14,038.13 Unapplied: 0.00
			Find	<b>View 3</b> First 1-9 of 9 Last
Item	Term	Amount		
Class	Installment ID	Last Activity Date	Balance	
Department Award	2016 Fall	09/01/2016	-2,605.44	<a href="#">Item Details</a>
			0.00	
Department Award	2016 Fall	08/15/2016	-2,605.44	<a href="#">Item Details</a> <b>8.</b>
			0.00	
Department Award	2016 Fall	08/15/2016	-8,827.25	<a href="#">Item Details</a>
			0.00	
Berkeley Campus Fee	2016 Fall	07/23/2016	537.25	<a href="#">Item Details</a>
			0.00	
Class Pass Fee - Transit	2016 Fall	07/23/2016	70.00	<a href="#">Item Details</a>
			0.00	
Graduate Non-Res Supp Tuition	2016 Fall	07/23/2016	7,551.00	<a href="#">Item Details</a>
			267.12	
Graduate Tuition	2016 Fall	07/23/2016	5,610.00	<a href="#">Item Details</a>
			0.00	
Health Insurance - Grad	2016 Fall	07/23/2016	2,073.00	<a href="#">Item Details</a>
			2,073.00	
Student Services Fee	2016 Fall	07/23/2016	537.00	<a href="#">Item Details</a>
			0.00	

Return

- This takes you to the **Payment Line Details** page for that line item.

It shows how (when) the award was released to the student (9a), details about the award (9b), and the charges the financial aid paid (9c).

### Payment Line Details

ID: 26979419 Student, Sonia Business Unit: UCB01  
 Item Nbr: 000000000000007 Department Award Payment ID Nbr: 1

Item Amount: -2,605.44 Applied Amount: -2,605.44 Balance: 0.00  
 Reference Nbr: Item Type: 945100001070

**Account Split for Payment** Find | View All First 1 of 1 Last

Account Nbr	Account Term	Item Term	Item Amount
0000001001	2016 Fall	2016 Fall	-2,605.44

**Details** Find | View All First 1 of 1 Last

Nbr	Posted	Effective	Billed	Due	GL Posted	Reference Nbr	Amount
1	08/15/2016	08/15/2016	09/01/2016		08/15/2016 7:00:17PM		-2,605.44

**Charges the Financial Aid paid** Find | View All First 1 of 1 Last

Item Type	Account Nbr	Term	Date	Amount
Graduate Tuition	0000001001	2016 Fall	2016 Fall	2,605.44

[Return](#)

10.

- Click the **Return** link to return to the **Customer Accounts** page.

- Click on the **Item Summary** link.

### Customer Accounts

Business Unit: UCB01  
 Student, Sonia ID: 2  
 Total: 2,340.12 Anticipated Aid: 7

Account Type	Account Number	Balance
ALLFEES	0000001001 - 2016 Fall	2,340.12 USD

**11.**

Go to: [Detail Trans](#) [Item Summary](#) [Items by Term](#) [Items by Date](#)

[Return to Search](#) [Notify](#)

12. In the **Balance** column, you are shown the amount of award money received by the student (**12a**, negative numbers) and the amount of money to be paid by the student (**12b**), fees assessed).

Item Summary

Business Unit: UCB01  
ID: 26979419 Student, Sonia

Personalize | Find | View All | First 1-9 of 9 Last

Item Description	Item Due Date	Refund Details	Item Type	Payment ID Nbr	Restricted	Term	Account Number	Account Term	Item Amt	Balance
Berkeley Campus Fee						2016 Fall	0000001001	2016 Fall	537.25	0.00
Class Pass Fee - Transit						2016 Fall	0000001001	2016 Fall	70.00	0.00
Graduate Non-Res Supp Tuition						2016 Fall	0000001001	2016 Fall	7,551.00	267.12
Graduate Tuition						2016 Fall	0000001001	2016 Fall	5,610.00	0.00
Health Insurance - Grad						2016 Fall	0000001001	2016 Fall	2,073.00	2,073.00
Student Services Fee						2016 Fall	0000001001	2016 Fall	537.00	0.00
Department Award				1 N		2016 Fall			-2,605.44	0.00
Department Award				3 N		2016 Fall			-2,605.44	0.00
Department Award				2 N		2016 Fall			-8,827.25	0.00

Return **13.**

Columns are sortable with a click on the **column header**.

Note, also the **Item Due Date** tab (**12c**), which shows when the student's fees must be paid.

13. Click on the **Return** link to return to the main **Customer Accounts** page.

14. Next, click on the **Item by Terms** link

Customer Accounts

Business Unit: UCB01  
Student, Sonia ID: 26979419

Total: 2,340.12 Anticipated Aid: 7,816.32

Account Type	Account Number	Balance	Open Date
ALLFEES	0000001001 - 2016 Fall	2,340.12 USD	07/23/2016

**14.**

Go to: Detail Trans Item Summary **Items by Term** Items by Date Due Charges

Return to Search Notify

15. This shows items by current term, with sortable columns, posted dates for fees assessed (15a), and posted dates for credits to the student's account (15b).

Balances owed on fees assessed are shown in the far right column (15c).

15a. {  
15b. {

15c. }

### Items By Term

Business Unit: UCB01  
ID: 26979419 Student, Sonia

Find | View All First 1 of 1 Last

Term	Total Credits	Total Debits	Antic Aid	Total	Total Incl Antic Aid
2016 Fall	-14,038.13	16,378.25	7,816.32	2,340.12	-5,476.200

Personalize | Find | View All | First 1.9 of 9 Last

Item Type	Date Posted	Item Effective Date	Line Total	Item Balance
Graduate Tuition	07/23/2016	07/23/2016	5,610.00	0.00
Graduate Non-Res Supp Tuition	07/23/2016	07/23/2016	7,551.00	267.12
Student Services Fee	07/23/2016	07/23/2016	537.00	0.00
Health Insurance - Grad	07/23/2016	07/23/2016	2,073.00	2,073.00
Class Pass Fee - Transi	07/23/2016	07/23/2016	70.00	0.00
Berkeley Campus Fee	07/23/2016	07/23/2016	537.25	0.00
Department Award	08/15/2016	08/15/2016	-2,605.44	0.00
Department Award	08/15/2016	08/15/2016	-8,827.25	0.00
Department Award	09/01/2016	09/01/2016	-2,605.44	0.00

Return

16. Click the **Return** link to go back to the **Customer Accounts** page.

16.

17. Explore **Items by Date** by clicking on its link.

### Customer Accounts

Business Unit: UCB01  
Student, Sonia ID: 26979419

Total: 2,340.12 Anticipated Aid: 7,816.32

Account Type	Account Number	Balance	Open Date	St
ALLFEES	0000001001 - 2016 Fall	2,340.12 USD	07/23/2016	Ac

17.

Go to: Detail Trans Item Summary Items by Term **Items by Date** Due Charges

Return to Search Notify

18. You can sort by **Posted Date**, **Effective Date**, **Billing Date**, or **Due Date**. The default is **Posted Date**.

Negative numbers are awards; positive numbers are fees assessed.

The **Amount** and **Total** columns shows a running total adding awards and subtracting fees assessed.

**Items By Date**

Business Unit: UCB01  
ID: 26979419 Student, Sonia

**Sort Detail By**

Posted Date  Effective Date  Bill Date  Due Date

From Date: 01/01/1900 To Date: 01/01/2100 **18.** Search

Date Posted	Item Effective Date	Billing Date	Due Date	Item Type	Term	Amount	Total
09/01/2016	09/01/2016			Department Award	2016 Fall	-2,605.440	-2,605.44
08/15/2016	08/15/2016			Department Award	2016 Fall	-11,432.690	-14,038.13
07/23/2016	07/23/2016	08/02/2016	08/19/2016	Graduate Tuition	2016 Fall	5,610.000	-8,428.13
07/23/2016	07/23/2016	08/02/2016	08/19/2016	Class Pass Fee - Transit	2016 Fall	70.000	-8,358.13
07/23/2016	07/23/2016	08/02/2016	08/19/2016	Student Services Fee	2016 Fall	537.000	-7,821.13
07/23/2016	07/23/2016	08/02/2016	08/19/2016	Health Insurance - Grad	2016 Fall	2,073.000	-5,748.13
07/23/2016	07/23/2016	08/02/2016	08/19/2016	Graduate Non-Res Supp Tuition	2016 Fall	7,551.000	1,802.87
07/23/2016	07/23/2016	08/02/2016	08/19/2016	Berkeley Campus Fee	2016 Fall	537.250	2,340.12
		08/02/2016	08/19/2016	Invoice Generated		16,378.250	2,340.12
		09/01/2016	09/02/2016	Invoice Generated		2,340.120	2,340.12

[Return](#)

19. Click the **Return** link to return the main **Customer Accounts** page.

20. Next, click on **Due Charges**.

**Customer Accounts**

Business Unit: UCB01  
Student, Sonia ID: 26979419 Academic Information

Total: 2,340.12 Anticipated Aid: 7,816.32

Account Type	Account Number	Balance	Open Date	Status
ALLFEES	0000001001 - 2016 Fall	2,340.12 USD	07/23/2016	Active

**20.**

Go to: [Detail Trans](#) [Item Summary](#) [Items by Term](#) [Items by Date](#) [Due Charges](#) [Payment Plans](#) [View Anticipated Aid](#)

[Return to Search](#) [Notify](#)



21. Here you view the fees assessed that are due to be paid (21a) and a breakdown by item (21b).

**21a.**

Due Date	Due Amount	Total Due
08/19/2016	2,340.12	2,340.12

**21b.**

Item Type	Item Term	Account Nbr	Account Term	Due Date	Due Amt	Total Due
Health Insurance - Grad	2016 Fall	0000001001	2016 Fall	08/19/2016	2,073.00	2,073.00
Graduate Non-Res Supp Tuition	2016 Fall	0000001001	2016 Fall	08/19/2016	267.12	2,340.12

**Return**

22. Click the **Return** link to return to the **Customer Accounts** page.

**22.**

23. Next, click the **View Anticipated Aid** link.

**23.**

Account Type	Account Number	Balance	Open Date	Status
ALLFEES	0000001001 - 2016 Fall	2,340.12 USD	07/23/2016	Active

Go to: [Detail Trans](#) [Item Summary](#) [Items by Term](#) [Items by Date](#) [Due Charges](#) [Payment Plans](#) **[View Anticipated Aid](#)**

24. The **Anticipated Aid** page shows the date upcoming awards will be distributed.

Because we chose to **View All**, all three awards are showing simultaneously.

Item Type	Career	Date	Apply Dt	Expire Dt	Net Award
Department Award	GRAD	08/12/2016 2:33:18PM	10/01/2016	10/31/2016	2,605.44
Department Award	GRAD	08/12/2016 2:33:18PM	12/01/2016	12/31/2016	2,605.44
Department Award	GRAD	08/12/2016 2:33:18PM	11/01/2016	12/01/2016	2,605.44

25. Click the **Return** link to return the **Customer Accounts** main page.

26. Click the **Return to Search** button (26a), to search for another student, or click the **Sign Out** (26b) link to exit your *Campus Solutions* session.

---

## Support:

For questions or assistance, please contact SIS Support.

- Call **510-664-9000** (press **option 6** to reach SIS support)
- Email: [sishelp@berkeley.edu](mailto:sishelp@berkeley.edu)
- Submit a ticket: [https://shared-services-help.berkeley.edu/new\\_ticket/it](https://shared-services-help.berkeley.edu/new_ticket/it)

For job aids and videos, visit [sis.berkeley.edu](http://sis.berkeley.edu)