

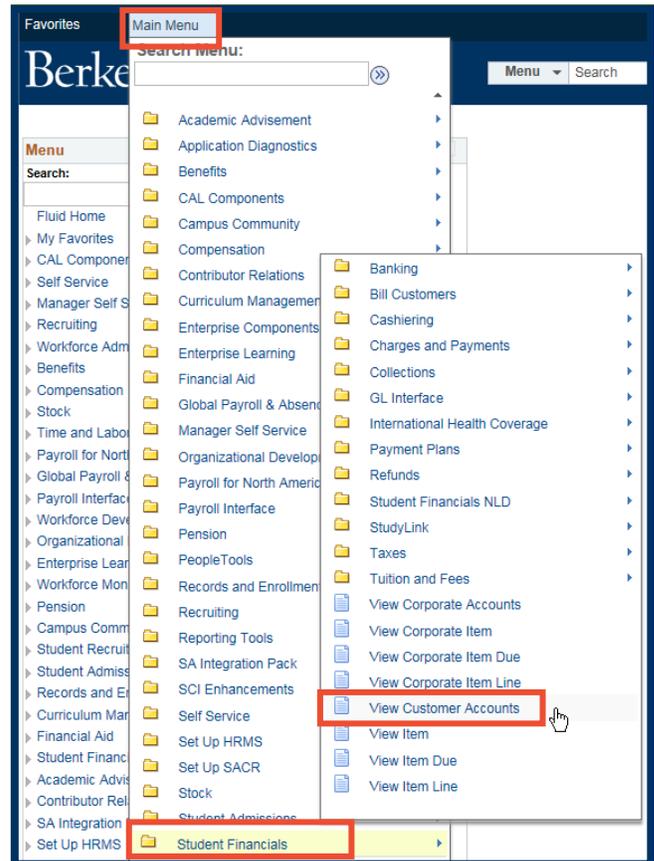
Viewing a Student's Account in Campus Solutions

PATH: Main Menu > Student Financials > View Customer Accounts

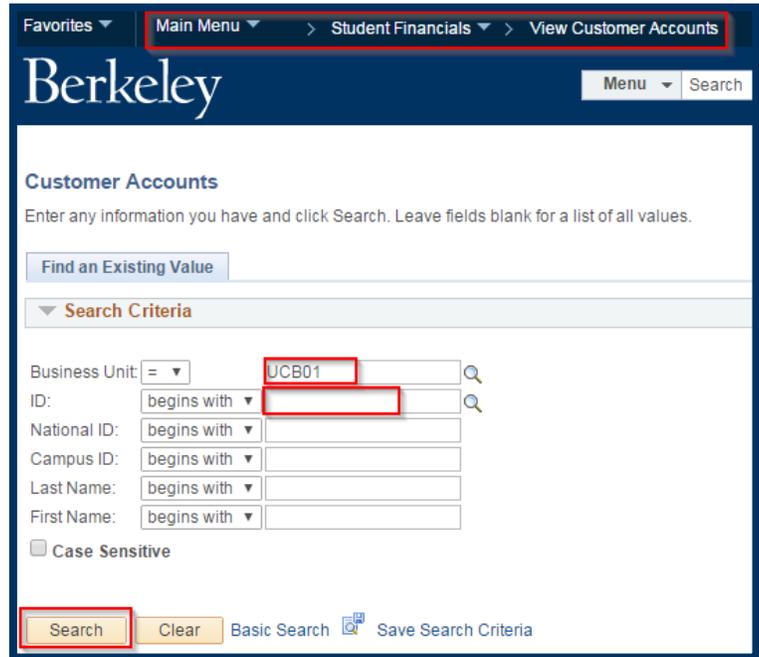
There are some important points to bear in mind as you view a student's account in *Campus Solutions*.

- 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
- All new students for Fall 2016 will have a 10-digit student identification number that will start with 303#####. Sometimes this student identification number will be referred to in *Campus Solutions* as "EmpID".
- All continuing or readmitted students who attended UC Berkeley prior to Fall 2016, will retain in *Campus Solutions* their legacy 8-digit student identification number.
- In CARS, due dates always fell on the 15th of a month. Due dates in *Campus Solutions* are dynamic and could fall on any day of the month.

1. From the **Main Menu**, navigate to: **Student Financials > View Customer Accounts**.



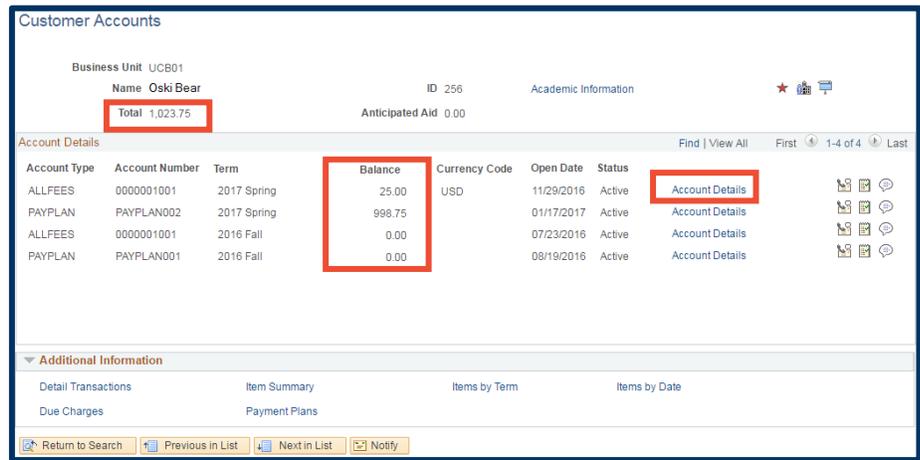
- On the **Search Criteria**, make sure that **Business Unit** is “UCB01”.
- Enter a student’s identification number in the **ID** field.
- Click **Search**.



- You will be directed to the **Customer Accounts** page.

The **Customer Accounts** page will display the total amount due on the account.

To view the details that make up the account, click the **Account Details** link.



- The **Account Details** page will display the various charges and credits on the student’s account. To see all items, click **View All**, or click the **Show Previous Rows/Show More Rows** buttons ().



- Click the **Item Details** link.
- The **Item Details** page show details of a specific item, including when the item was assessed to the account, when it is due, and what payments have been applied to it.

Item Details

Business Unit UCB01
 ID 256 Oski Bear
 Item Number 000000000000057

Item Amount 25.00 Applied Amount 0.00 Balance 25.00
 Reference Number Item Type 302003000006

Line Details Find | View All First 1 of 1 Last

Line Num	Posted	Effective	Billed	Due	GL Posted	Reference Number	Amount
1	06/14/2017	06/13/2017		06/14/2017	06/14/2017 7:46:16PM		25.00

Payments paying this Charge

Details Find | View All First 1 of 1 Last

Item Type	Account Number	Item Term	Date	Amount
				0.00

Return

- Alternatively, from the **Customer Accounts** page, the user can click on any of the six links under **Additional Information**, to navigate to various views of the data.
- The **Due Charges** and **Payment Plans** links are commonly used to display items by their due date or fee payment plan high-level details.

Customer Accounts

Business Unit UCB01
 Name Oski Bear ID 256 Academic Information
 Total 1,023.75 Anticipated Aid 0.00

Account Details Find | View All First 1-4 of 4 Last

Account Type	Account Number	Term	Balance	Currency Code	Open Date	Status	
ALLFEES	0000001001	2017 Spring	25.00	USD	11/29/2016	Active	Account Details
PAYPLAN	PAYPLAN002	2017 Spring	998.75		01/17/2017	Active	Account Details
ALLFEES	0000001001	2016 Fall	0.00		07/23/2016	Active	Account Details
PAYPLAN	PAYPLAN001	2016 Fall	0.00		08/19/2016	Active	Account Details

Additional Information

Detail Transactions Item Summary Items by Term Items by Date
 Due Charges Payment Plans

Return to Search Previous in List Next in List Notify

- The **Due Charges** page shows two views: **By Due Date** and **By Item**.

Due Charges

Business Unit UCB01
 ID 256 Oski Bear

By Due Date Find | View All First 1-2 of 2 Last

Due Date	Due Amount	Total Due
05/14/2017	998.75	998.75
06/14/2017	25.00	1,023.75

By Item Find | View All First 1-2 of 2 Last

Item Type	Item Term	Account Nbr	Account Term	Due Date	Due Amount	Total Due
Payment Plan Installment	2017 Spr	PAYPLAN002	2017 Spr	05/14/2017	998.75	998.75
Late Fee	2017 Spr	0000001001	2017 Spr	06/14/2017	25.00	1,023.75

Return

12. On the **Payment Plans** page—linked from the **Customer Accounts** page— if a student is enrolled in a fee payment plan, this page will show high-level details about the plan. The **Payment Plans** page defaults to show details on the **Plan Description** tab.

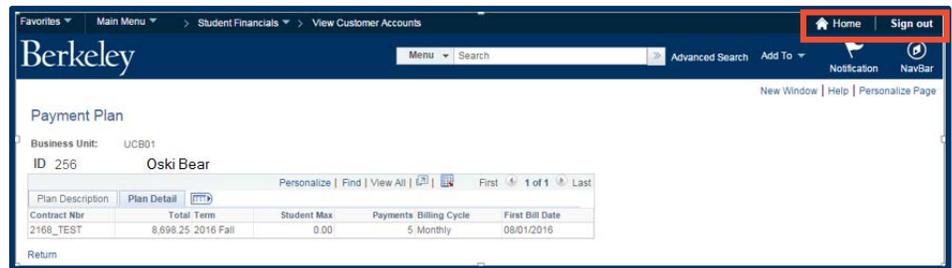


NOTE: Observe that the **Payment Plans** page has two tabs, **Plan Description** and **Plan Detail**.

13. You may click on the **Plan Detail** tab, or click on the  icon to expand the page to show all fields on *both* tabs, in one view.



14. Click the **Home** link in the **Navigation Bar** across the top of the window, to continue working elsewhere in *Campus Solutions*, or click the **Sign out** link to end your *Campus Solutions* session.



NOTE: To completely exit *Campus Solutions*, exit your browser, as well, at the end of a browser work session. Do not leave your open browser unattended.

Support:

For questions or assistance, please contact SIS Production Support Team:

- Email: sishelp@berkeley.edu
 - Call **510-664-9000** (press **option 6**)
- For additional SIS resources, please visit:
sis.berkeley.edu/training