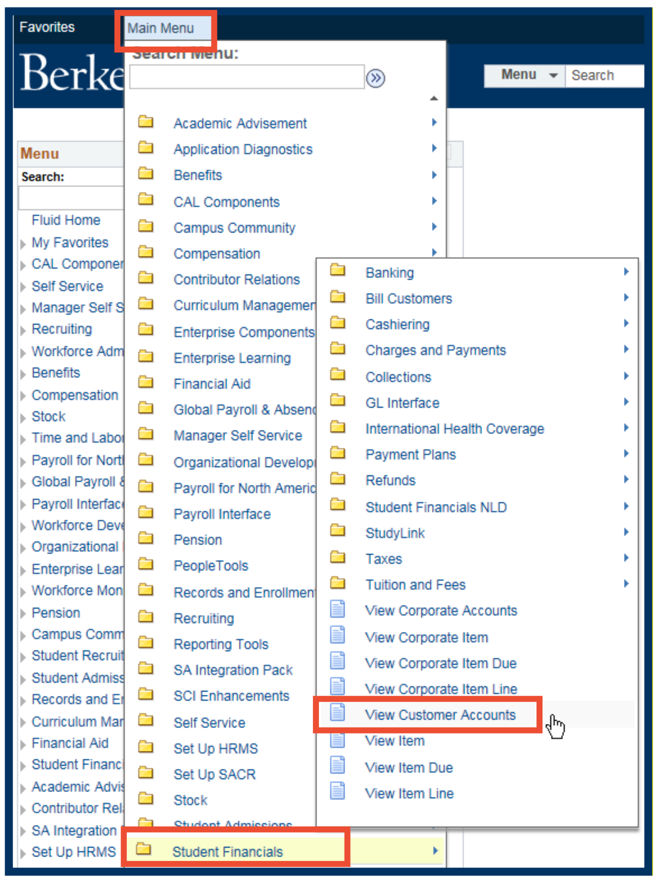
Viewing a Student's Account in Campus Solutions

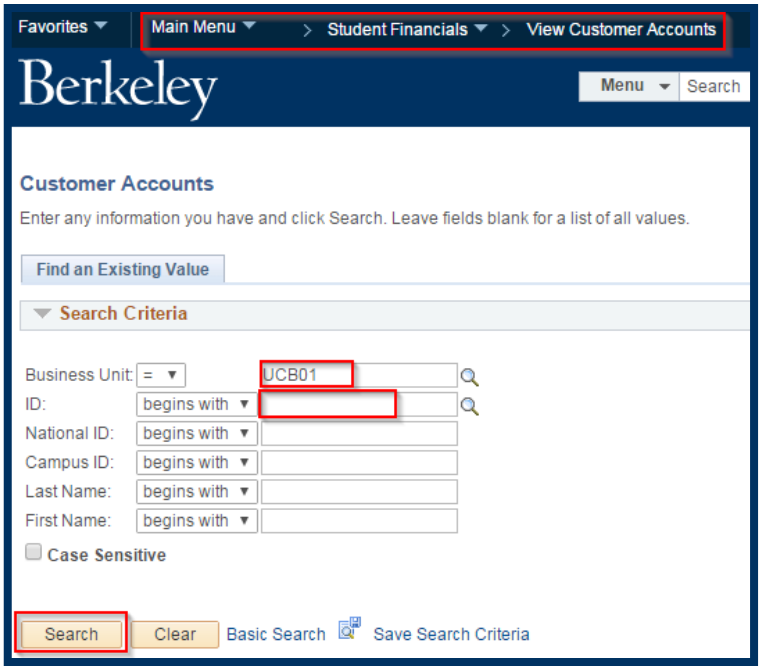
PATH: Main Menu > Student Financials > View Customer Accounts

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

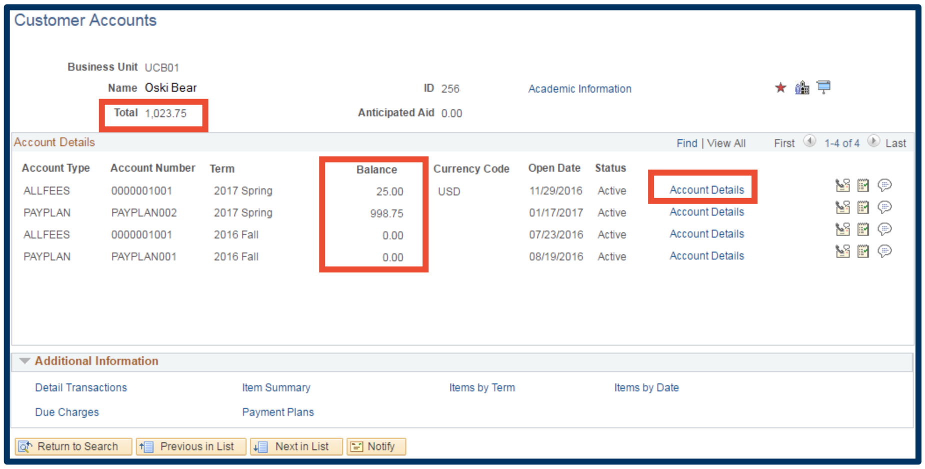
- A student's record is only viewable once a charge or credit exists on it.
- Beginning Fall 2016, tuition and fees will only be calculated under two conditions:
  - tuition is ready to be calculated (after the UC Regents have met and approved the new fee amounts)
  - the student has enrolled in at least 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**.





2. On the **Search Criteria**, make sure that **Business Unit** is "**UCB01**".
3. Enter a student's identification number in the **ID** field.
4. Click **Search**.



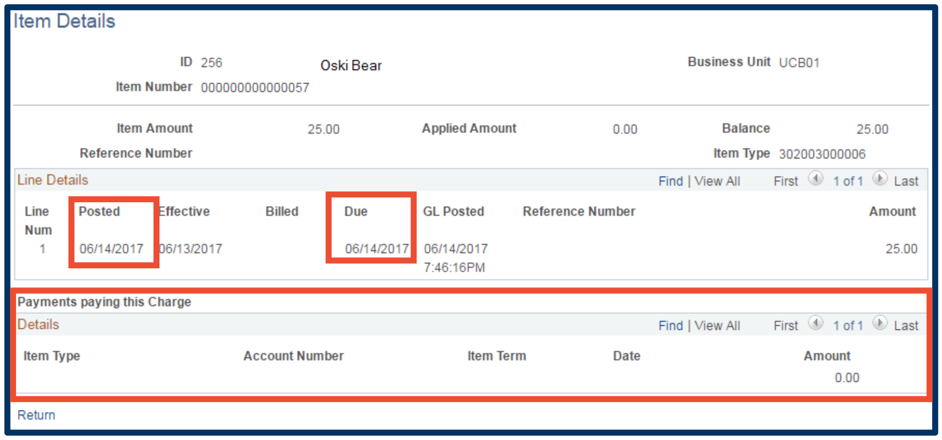
5. You will be directed to the **Customer Accounts** page.

   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.

6. 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 ( ).

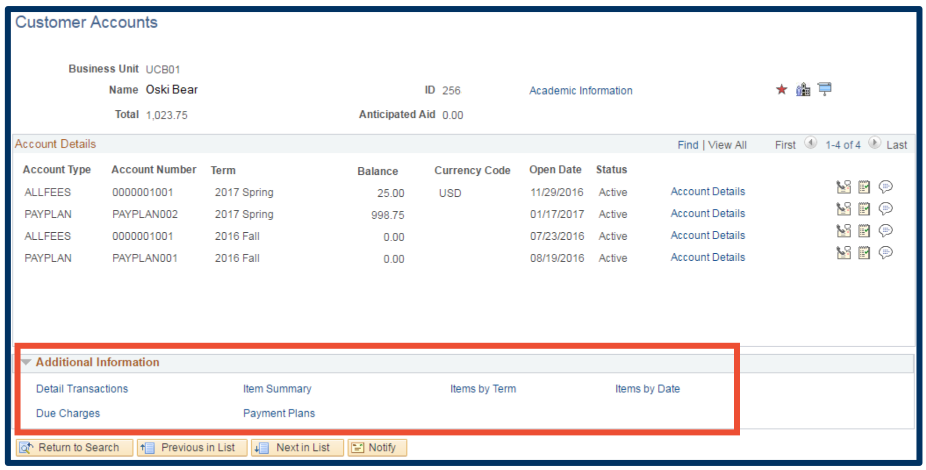
7. Click the **Item Details** link.

8. 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.

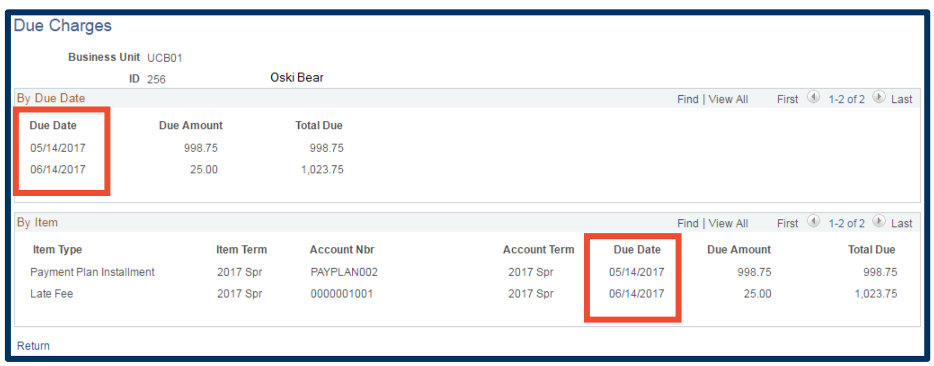


9. Alternatively, from the **Customer Accounts** page, the user can click on any of the six links under **Additional Information**, to navigate to various views of the data.

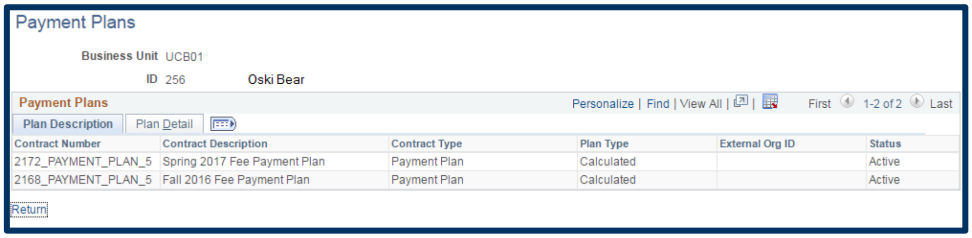
10. The **Due Charges** and **Payment Plans** links are commonly used to display items by their due date or fee payment plan high-level details.



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

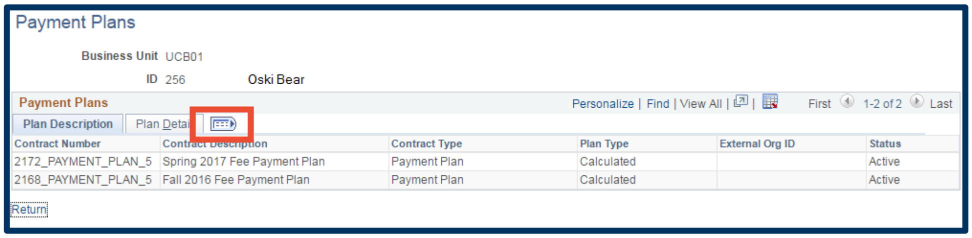


12. On the **Payment Plans** page—linked from the **Customer Accounts** page— if a student is enrolled in a fee payment plan, this page will show high-level details about the plan. The **Payment Plans** page defaults to show details on the **Plan Description** tab.

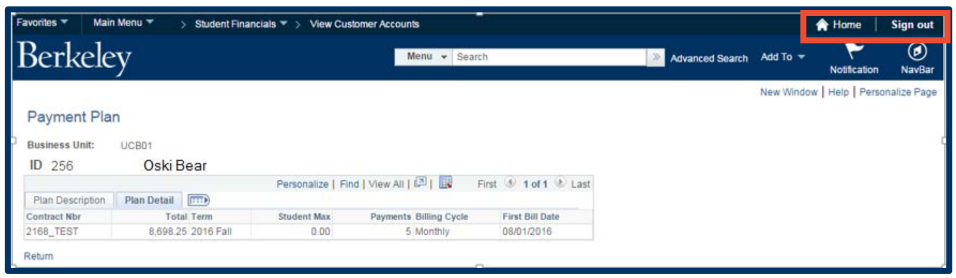


NOTE: Observe that the **Payment Plans** page has two tabs, **Plan Description** and **Plan Detail**.

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