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

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- 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 ()).

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Customer A Enter any infor Find an Exis	Accounts mation you have and click Search. Leave fields blank for a list of all values. In ting Value Criteria
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Customer A	ccounts							
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Busine	ess Unit UCB01							
	Name Oski Bear			ID 256	Academic In	formation		★ 🏙 쿠
	Total 1,023.75		Anticipated A	Aid 0.00				
Account Details							Find View All	First 🕚 1-4 of 4 🕑 Last
Account Type ALLFEES PAYPLAN ALLFEES PAYPLAN	Account Number 0000001001 PAYPLAN002 0000001001 PAYPLAN001	Term 2017 Spring 2017 Spring 2016 Fall 2016 Fall	Balance 25.00 998.75 0.00 0.00	Currency Code USD	Open Date 11/29/2016 01/17/2017 07/23/2016 08/19/2016	Status Active Active Active	Account Details Account Details Account Details Account Details	
Additional I	nformation							
Detail Transa	ctions	Item Summary		Items by Term		Items	by Date	
Due Charges		Payment Plans						
Return to Sea	arch 🕇 Previous	in List 🚛 Next in Li	st 🔛 Notify					

ID 255 Oski Bear Account Number 000000 2017 Spr			Business Unit UCB01 Account Balance 25.00					
Debits 8,140.25		Credits -8,115.25		Applied 8,115.25		Unapplied	0.00	
Details						Find View A	li First 🔮 1-3 of 15 🔮	
Item	Term	Class	Taxes	Amount Inci Tax	Balance	Installment ID Last Activity	Date	
Late Fee	2017 Spr			25.00	25.00	06/14/2017	Item Details	
Federal Unsubsidized Loan Q1	2017 Spr			-25.00	0.00	04/17/2017	item Details	
Federal Subsidized Loan Q1	2017 Spr			0.00	0.00	04/11/2017	Nem Details	
Federal Subsidized Loan Q1	2017 Spr			0.00	0.00	04/11/2017	Rem Details	

- 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.

Item Details					
ID 256	Oski Bear			Business Unit	UCB01
Item Number 0000	0000000057				
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 Posted Effective	Billed Due	GL Posted	Reference Number		Amount
1 06/14/2017 06/13/2017	06/14/2017	7:46:16PM			25.00
Payments paying this Charge					
Details				Find View All	First 🕚 1 of 1 🕑 Last
ltem Type	Account Number	Item Term	Date		Amount 0.00
Return					
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.
- 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.

Customer A	ccounts							
Busine	ss Unit UCB01 Name Oski Bear Total 1,023.75		Anticipated A	ID 256. Aid 0.00	Academic In	formation		★ 🏨 쿠
Account Details							Find View All	First 🕚 1-4 of 4 🕑 Last
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Business U	nit UCB01					
	ID 256	Oski Bear				
/ Due Date					Find View All Fin	rst 🕚 1-2 of 2 🕑 L
Due Date	Due Amount	Total Due				
05/14/2017	998.75	998.75				
06/14/2017	25.00	1,023.75				
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Here Trees	Here T	and a second bibs	A second Term	Due Date	Pind View Air Pin	St VI-2012 V
item type	item i	erm Account NDr	Account term	Due Date	Due Amount	Total Due
Payment Plan Insta	Iment 2017 S	Spr PAYPLAN002	2017 Spr	05/14/2017	998.75	998.7
Late Fee	2017 \$	Spr 0000001001	2017 Spr	06/14/2017	25.00	1,023.7

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.

- 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.

Payment Plans					
Business Unit	UCB01				
ID	256 Oski Bear				
Payment Plans			Personalize Find	View All 💷 🔢 🛛 First	🕚 1-2 of 2 🕑 Last
Plan Description Plan	n Detail				
Contract Number	Contract Description	Contract Type	Plan Type	External Org ID	Status
2172_PAYMENT_PLAN_5	Spring 2017 Fee Payment Plan	Payment Plan	Calculated		Active
2168_PAYMENT_PLAN_5	Fall 2016 Fee Payment Plan	Payment Plan	Calculated		Active
Return					

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

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Payment Plan				
Business Unit: UCB01				9
ID 256 Oski Bear				
Personalize Find View All 🕮 🔢 First 🚯 1 of 1 🕑 Last				
Plan Description Plan Detail (TTT)				
Contract Nbr Total Term Student Max Payments Billing Cycle First Bill Date				
2168_TEST 8,698.25 2016 Fall 0.00 5 Monthly 08/01/2016				

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