Viewing Payments

PATH: Main Menu > Student Financials > Charges and Payments > View Payments

The View Payments component displays all payments, financial aid, waivers, deposits and write-offs posted to a Customer Account. Additionally, there are tabs which show the how the payments were allocated and any reference numbers posted in the transaction.

Navigate to the **View Payments** page.

Main Menu > Student Financials > Charges and Payments > View Payments

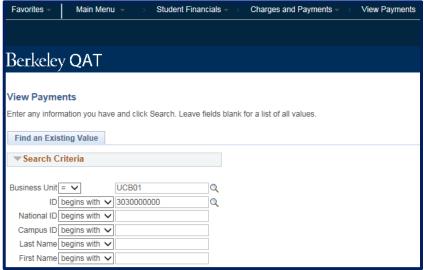
Search for the student whose payments need reviewing.

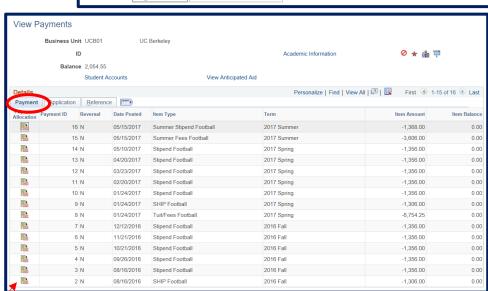
On the Payment tab, the Payment ID, Reversal indicator, Date Posted, Item Type, Term, Item Amount and Item Balance are displayed.

The **Item Type** is a description of the transaction.

If the **Reversal** indicator value is **N**, the payment has not been reversed.

On the left, is a Payment Allocation icon which is described below.





The **Application** tab repeats the **Payment ID** and also displays the payment allocation rules attached to each transaction.

The Charge Priority
List determine what
charges can paid and
in what order.

Restrict (payment) to Account is a manual adjustment that can be done at the time the credit is posted to limit what the credit can pay.

Other options on this page are not used.

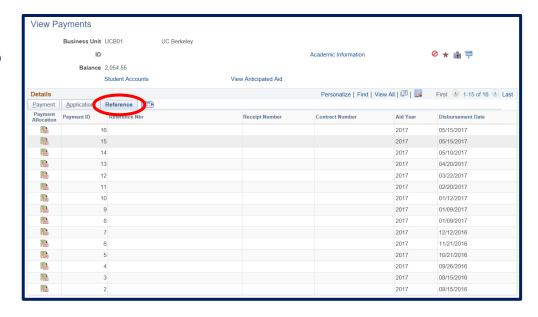
The **Reference** tab repeats the **Payment ID** and displays a **Reference Number** attached to the transaction.

Receipt Number is not used at UCB.

Contract Number shows payment plan/third party contract transactions.

Disbursement Date will also show.

E	Business Unit	UCB01	UC Berkeley					
	ID				Acad	lemic Information		O 🛨 🏭 쿠
	Balance	2,054.55						
		Student A	ccounts	View Anticipated	Aid			
Details						Personalize Find V	iew All 💷 🔣	First 1-15 of 16 D
Payme Payme	Application	<u>R</u> eferen	ce					
Payment Allocation	Payment ID		Charge Priority List	Restrict to Account	Priority	Restrict to Invoice	Invoice Number	
		16	F_REFUND	N	999	N		
		15	F_TM_XS	N	700	N		
		14	F_REFUND	N	999	N		
		13	F_REFUND	N	999	N		
		12	F_REFUND	N	999	N		
		11	F_REFUND	N	999	N		
		10	F_REFUND	N	999	N		
		9	F_SHIP_N	N	700	N		
		8	F_TM_XS	N	700	N		
		7	F_REFUND	N	999	N		
		6	F_REFUND	N	999	N		
		5	F_REFUND	N	999	N		
		4	F_REFUND	N	999	N		
		3	F_REFUND	N	999	N		
		2	F_SHIP_N	N	700	N		



At the top of the page are 3 links: Academic Information, Student Accounts, and Anticipated Aid.

We will examine each of those below.

The Academic Information link displays personal data about the student.

The Career Term

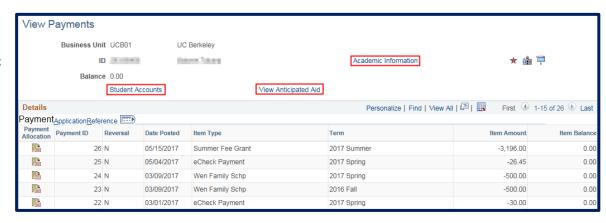
Data box shows

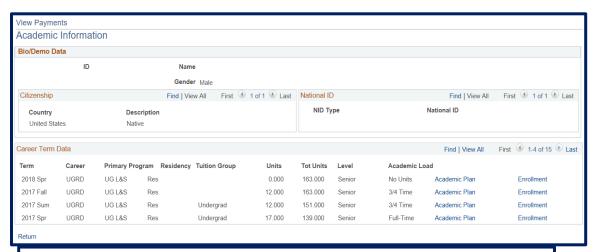
academic data

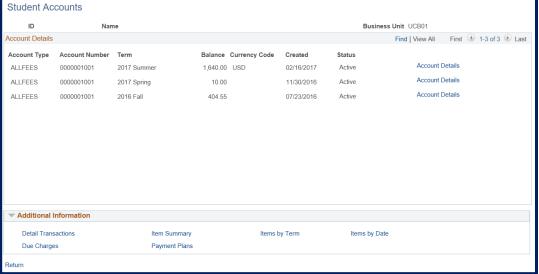
term by term.

The Student Accounts link goes to the account page where the details can be viewed.

(See the Viewing Customer Accounts job aid for more information.)







To see Anticipated Aid Details, click the View Anticipated Aid link.

Anticipated Aid is aid that has been awarded but not yet disbursed.



The Payment Allocation icon available on all tab pages.

Clicking on the icon for a transaction shows a **Description** of the charges paid by the credit item, as well as the **Item Type Number** that was used.



Support:

For questions or assistance, please contact SIS Production Support.

- Email: sishelp@berkeley.edu
- Call 510-664-9000 (press option 6)

For additional SIS resources, please visit: sis.berkeley.edu/training