

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.

Berkeley QAT

View Payments

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:

ID:

National ID:

Campus ID:

Last Name:

First Name:

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.

View Payments

Business Unit: UCB01 UC Berkeley

ID: Academic Information

Balance: 2,054.55

Student Accounts View Anticipated Aid

Payment Application Reference

Allocation	Payment ID	Reversal	Date Posted	Item Type	Term	Item Amount	Item Balance
	16	N	05/15/2017	Summer Stipend Football	2017 Summer	-1,368.00	0.00
	15	N	05/15/2017	Summer Fees Football	2017 Summer	-3,606.00	0.00
	14	N	05/10/2017	Stipend Football	2017 Spring	-1,356.00	0.00
	13	N	04/20/2017	Stipend Football	2017 Spring	-1,356.00	0.00
	12	N	03/23/2017	Stipend Football	2017 Spring	-1,356.00	0.00
	11	N	02/20/2017	Stipend Football	2017 Spring	-1,356.00	0.00
	10	N	01/24/2017	Stipend Football	2017 Spring	-1,356.00	0.00
	9	N	01/24/2017	SHIP Football	2017 Spring	-1,306.00	0.00
	8	N	01/24/2017	Tuit/Fees Football	2017 Spring	-6,754.25	0.00
	7	N	12/12/2016	Stipend Football	2016 Fall	-1,356.00	0.00
	6	N	11/21/2016	Stipend Football	2016 Fall	-1,356.00	0.00
	5	N	10/21/2016	Stipend Football	2016 Fall	-1,356.00	0.00
	4	N	09/26/2016	Stipend Football	2016 Fall	-1,356.00	0.00
	3	N	08/16/2016	Stipend Football	2016 Fall	-1,356.00	0.00
	2	N	08/16/2016	SHIP Football	2016 Fall	-1,306.00	0.00

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.

View Payments

Business Unit UCB01 UC Berkeley

ID Academic Information

Balance 2,054.55

Student Accounts View Anticipated Aid

Details Personalize | Find | View All | First 1-15 of 16 Last

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	

View Payments

Business Unit UCB01 UC Berkeley

ID Academic Information

Balance 2,054.55

Student Accounts View Anticipated Aid

Details Personalize | Find | View All | First 1-15 of 16 Last

Payment Allocation	Payment ID	Reference Nbr	Receipt Number	Contract Number	Aid Year	Disbursement Date
	16				2017	05/15/2017
	15				2017	05/15/2017
	14				2017	05/10/2017
	13				2017	04/20/2017
	12				2017	03/22/2017
	11				2017	02/20/2017
	10				2017	01/12/2017
	9				2017	01/09/2017
	8				2017	01/09/2017
	7				2017	12/12/2016
	6				2017	11/21/2016
	5				2017	10/21/2016
	4				2017	09/26/2016
	3				2017	08/15/2016
	2				2017	08/15/2016

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.)

View Payments

Business Unit UCB01 UC Berkeley

ID [REDACTED] [REDACTED]

Academic Information

Balance 0.00

Student Accounts View Anticipated Aid

Details Personalize | Find | View All | [REDACTED] First 1-15 of 26 Last

Payment Allocation	Payment ID	Reversal	Date Posted	Item Type	Term	Item Amount	Item Balance
[REDACTED]	26 N		05/15/2017	Summer Fee Grant	2017 Summer	-3,196.00	0.00
[REDACTED]	25 N		05/04/2017	eCheck Payment	2017 Spring	-26.45	0.00
[REDACTED]	24 N		03/09/2017	Wen Family Schp	2017 Spring	-500.00	0.00
[REDACTED]	23 N		03/09/2017	Wen Family Schp	2016 Fall	-500.00	0.00
[REDACTED]	22 N		03/01/2017	eCheck Payment	2017 Spring	-30.00	0.00

View Payments

Academic Information

Bio/Demo Data

ID Name

Gender Male

Citizenship Find | View All First 1 of 1 Last

National ID Find | View All First 1 of 1 Last

Country	Description	NID Type	National ID
United States	Native		

Career Term Data Find | View All First 1-4 of 15 Last

Term	Career	Primary Program	Residency	Tuition Group	Units	Tot Units	Level	Academic Load	
2018 Spr	UGRD	UG L&S	Res		0.000	163.000	Senior	No Units	Academic Plan Enrollment
2017 Fall	UGRD	UG L&S	Res		12.000	163.000	Senior	3/4 Time	Academic Plan Enrollment
2017 Sum	UGRD	UG L&S	Res	Undergrad	12.000	151.000	Senior	3/4 Time	Academic Plan Enrollment
2017 Spr	UGRD	UG L&S	Res	Undergrad	17.000	139.000	Senior	Full-Time	Academic Plan Enrollment

Return

Student Accounts

ID Name Business Unit UCB01

Account Details Find | View All First 1-3 of 3 Last

Account Type	Account Number	Term	Balance	Currency Code	Created	Status	
ALLFEES	0000001001	2017 Summer	1,640.00	USD	02/16/2017	Active	Account Details
ALLFEES	0000001001	2017 Spring	10.00		11/30/2016	Active	Account Details
ALLFEES	0000001001	2016 Fall	404.55		07/23/2016	Active	Account Details

Additional Information


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

Return

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

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

Anticipated Aid Details						
						Find
						First
						1 of 1
						Last
Term:		2017 Summer		Term Total		2,736.00
						Find View All
						First
						1-2 of 2
						Last
Item Type	Career	Date	Apply Dt	Expire Dt	Net Award	
Summer Stipend Football	UGRD	05/15/2017 5:48:23PM	07/15/2017	08/29/2017	1,368.00	
Summer Stipend Football	UGRD	05/15/2017 5:48:23PM	06/15/2017	07/30/2017	1,368.00	

The Payment Allocation icon  is 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.

Payment Allocation						
Business Unit		UCB01	UC Berkeley			
ID						
Payment ID		15	Summer Fees Football			
Term		2175	2017 Summer			
Reference Number						
		Item Type 947505800010				
Details						
						Personalize Find
						First
						1-2 of 2
						Last
Description	Item Nbr	Item Type	Item Term	Item Amount	Amount Applied	Payment Item Balance
☐ 0000001001 - 2017 Summer				-3,606.00		
Summer UC Undergrad Tuition	000000000000031	100000130000	2017 Summer	4,920.00	3,606.00	

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