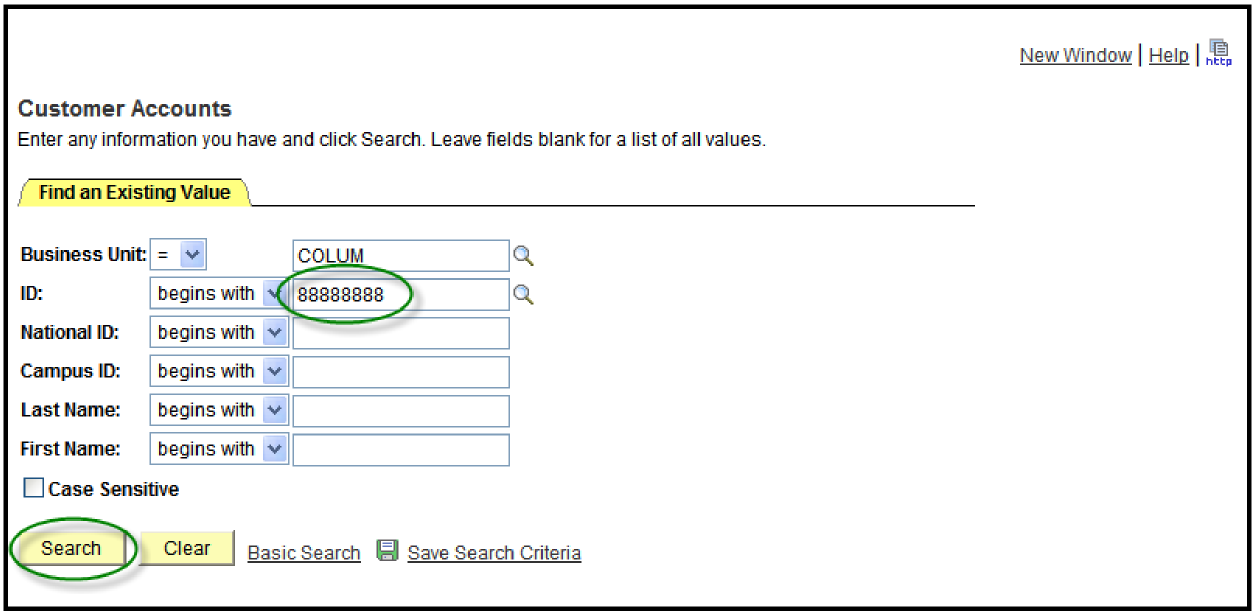
This module gives an introduction to viewing student accounts and outlines how to check enrollment status, account flags and FERPA, charges, payments and financial aid on a student account.

1	• View Customer Accounts
2	• Account Flags & FERPA
3	• Academic Plan & Enrollment
4	• Charges
5	• Payments
6	• Financial Aid

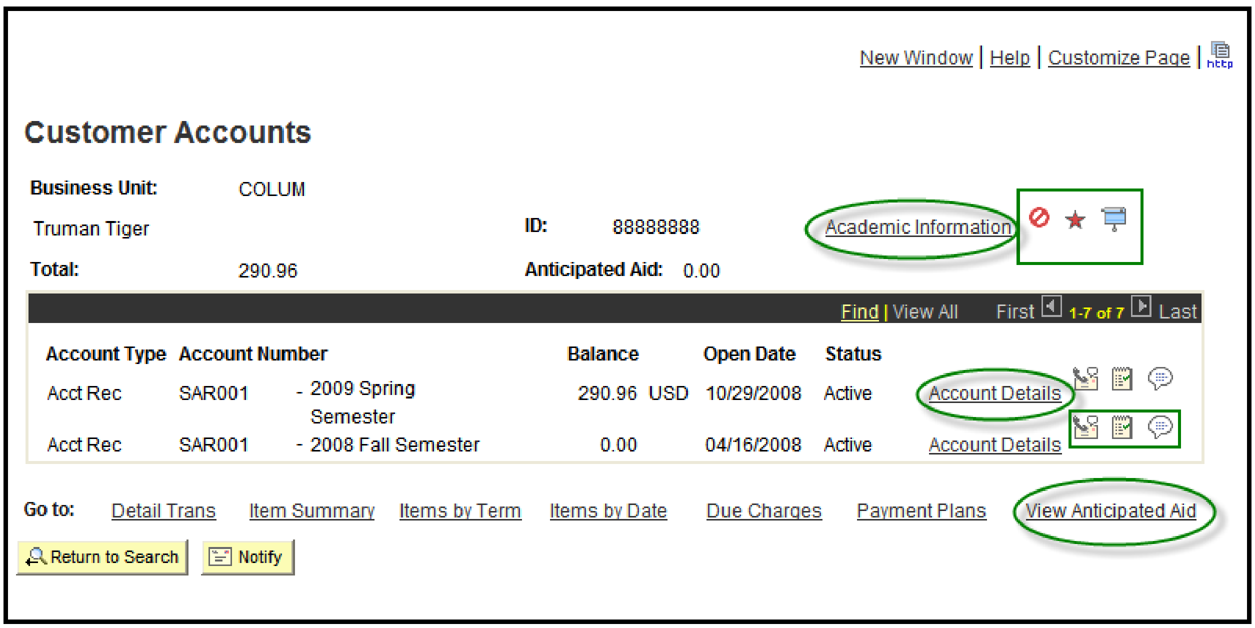
Navigate:	In myZou, Student Financials → View Customer Accounts

1 **View Customer Accounts**	**Note:** you can click **View Customer Accounts** on the left of your screen anytime to return to the first screen and enter a new student ID.

1 View Customer Accounts	Enter Student ID in the **ID** field – or – SS# in the **National ID** field. Click **Search**. If you don't know the Student ID or the SS#, you can search by **Last Name** and **First Name**. You can enter the entire name or a few letters. The search is easier the more information you enter. If multiple names come up, click the correct one.



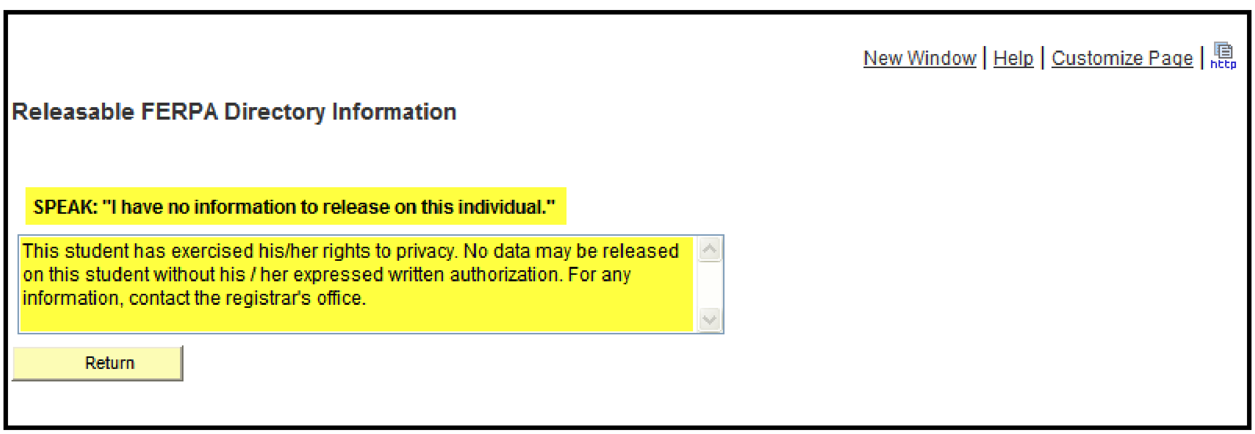
1 **View Customer Accounts**	The **Customer Accounts** screen pops up. From this screen, you can access detailed information regarding a student account – enrollment, charges, payments, etc. This is also where you would see any applicable **Negative ( ) &** **Positive ( ) Service Indicators** and **FERPA ( ) Indicator** or any comments made regarding the account - , , . Enrollment information is accessed through **Academic Information**. Charges/credits information is accessed through **Account Details**. **Note:** Information is sorted by term. **Note:** *Attachment A* defines the fields on this screen.



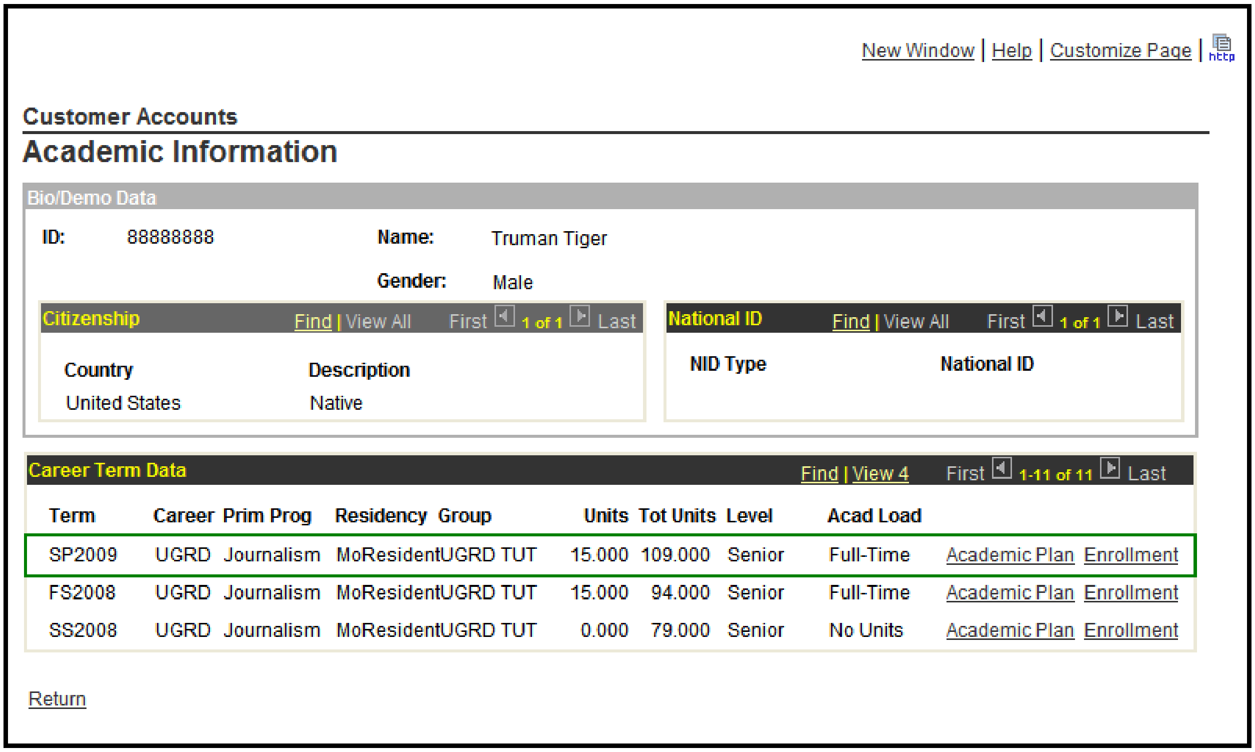
1 **View Customer Accounts**	**View Anticipated Aid** at the bottom of the screen provides information about future financial aid. Financial aid is typically granted on a yearly basis; however, the total amount awarded is divided and posted separately to the fall and spring semesters. Click **View Anticipated Aid** to see financial aid awarded but not yet posted to the student account. This screen shows the **Apply Date** – the date the aid is expected to post to the account. **Note:** The **View Anticipated Aid** link is not visible when no financial aid is pending.

2 **Account Flags & FERPA**	A Negative Service Indicator details negative status of the account. Some of these indicators are generated automatically, some are entered manually. C01 – C12 are the most common indicators affecting student accounts. All Negative Service Indicators place a hold on the account until resolved, restricting service from transcript denial up to all registration and charge abilities. The Cashiers' Office can temporarily remove a hold to buy books, register for class, etc. Students are typically given 1-2hrs, and the hold is put back on. A Positive Service Indicator details positive status of the account. These indicators are entered manually. **Note:** *Attachment B* identifies all the service indicators. These additional comment fields require security access to add and view: • - 'Communications' is not used much. • - 'Checklists' is used by Financial Aid. • - 'Comments' is used by different departments.

2 **Account Flags & FERPA**	FERPA is seen only if the student has exercised his/her rights to privacy. Click to see FERPA privacy information. No data may be released on this student without his/her expressed written authorization.



3 **Academic Plan & Enrollment**	From the **Customer Accounts** screen, click **Academic Information** to view enrollment information. The **Academic Information** screen pops up. This screen sorts by career and then term and identifies the credit hours/term, total credit hours, level and academic load. To get information on the declared major/minor for the student, click **Academic Plan**.



New Window | Help | Customize Page |

Customer Accounts

Academic Information

Bio/Demo Data

ID: 88888888 Name: Truman Tiger

Gender: Male

Citizenship Find | View All First 1 of 1 Last

Country	Description
United States	Native

National ID Find | View All First 1 of 1 Last

NID Type	National ID

Career Term Data Find | View 4 First 1-11 of 11 Last

Term	Career	Prim Prog	Residency	Group	Units	Tot Units	Level	Acad Load		
SP2009	UGRD	Journalism	MoResident	UGRD TUT	15.000	109.000	Senior	Full-Time	Academic Plan	Enrollment
FS2008	UGRD	Journalism	MoResident	UGRD TUT	15.000	94.000	Senior	Full-Time	Academic Plan	Enrollment
SS2008	UGRD	Journalism	MoResident	UGRD TUT	0.000	79.000	Senior	No Units	Academic Plan	Enrollment

Return

3 **Academic Plan & Enrollment**	To get information on registered courses for that term, click **Enrollment**. The **Enrollment Summary** screen pops up. This screen provides detailed information on classes, type of class, class section, enrollment status, credit hours and add/drop date. In this example, the summary shows both enrolled and dropped classes.

New Window | Help | Customize Page | http

Academic Information

Enrollment Summary

ID: 88888888 Truman Tiger

Find | View 5 First 1-8 of 8 Last

Class #		Subject	Catalog Component	Session Census Date	Section	Status	Reason	Basis	Prog Units Bill Units	Add Date Drop Date
71769 ETHNOGRAPHIC METHODS	Class Info	ANTHRO	4830 Lecture	Regular 02/16/2009	01	Enrolled	Enrolled	GRD	3.00 3.00	12/10/2008
71775 UNDGRD RSCH IN ANTHRO	Class Info	ANTHRO	4950 Ind Study	Regular 02/16/2009	06	Enrolled	Enrolled	GRD	3.00 3.00	01/16/2009
71950 INTRO TO VISUAL CULTURE	Class Info	AR_H_A	2850 Lecture	Regular 02/16/2009	01	Dropped	Drop Enrl Student Drop	GRD	3.00 3.00	10/28/2008 11/11/2008
73287 MIGRATION & IMMIGRATION	Class Info	GEOG	4770 Lecture	Regular 02/16/2009	01	Enrolled	Enrolled	GRD	3.00 3.00	10/28/2008
73293 SENIOR SEMINAR IN GEOGR	Class Info	GEOG	4990 RSD	Regular 02/16/2009	01	Enrolled	Enrolled	GRD	3.00 3.00	10/28/2008
74852 CANADIAN POLITC & GOVRNM	Class Info	POL_SC	2600 Lecture	Regular 02/16/2009	01	Enrolled	Enrolled	GRD	3.00 3.00	12/10/2008
75444 SOCIOLOGY OF SPORT	Class Info	SOCIOL	3430 Lecture	Regular 02/16/2009	01	Dropped	Drop Enrl Student Drop	GRD	3.00 3.00	10/28/2008 01/18/2009
84220 CREAT WRIT: INTMD FICTIO	Class Info	ENGLSH	2510 RSD	Regular 02/16/2009	03	Dropped	Drop Enrl Student Drop	GRD	3.00 3.00	11/11/2008 01/10/2009

Return

1 View Customer Accounts	Going back to the **Customer Accounts** screen, click **Account Details** to view charges and credits. Click **View All**. In this example… Payments & credits to the student account are highlighted. This includes payments made to the account as well as financial aid. Charges & refunds to the student account are boxed. In addition to charges, a financial aid refund was made to the account.

New Window | Help | Customize Page | http

Account Details

ID: 88888888 Truman Tiger **Business Unit:** COLUM

Account Number: SAR001 - FS2008 **Account Balance:** 0.00

Debits: 8,005.50 **Credits:** -8,005.50 **Applied:** 8,005.50 **Unapplied:** 0.00

Find | View All First 1-13 of 13 Last

Item / Class	Term / Item Status	Last Activity Date	Amount / Balance	
Refund Excess Fin Aid	FS2008		5,295.04	Item Details
	Active	09/29/2008	0.00	
Fed Direct Unsubsidized Ln 2	FS2008		-4,727.00	Item Details
	Active	09/22/2008	0.00	
eCheck Payment	SS2008		-2,644.33	Item Details
	Active	07/14/2008	0.00	
Student Parking Fee	FS2008		120.00	Item Details
	Active	09/12/2008	0.00	
Finance Charge	FS2008		50.45	Item Details
	Active	08/26/2008	0.00	
P A Y M E N T - Check	FS2008		-2,283.50	Item Details Receipt Details
	Active	08/26/2008	0.00	
Late Payment Fee	FS2008		10.00	Item Details
	Active	06/24/2008	0.00	
Credit Card Payment	FS2008		-83.86	Item Details
	Active	08/11/2008	0.00	
Recreation Center Ugr	FS2008		133.11	Item Details
	Active	04/25/2008	0.00	

Return

4 Charges	Charges are generated from a variety of sources: course fees, education fees, parking, health fees, etc. You may also see charges from the bookstore, library or concessions. A 1% finance charge accrues on the unpaid billed balance each month. A $10 late fee is assessed if no payment is made by the due date. Students are encouraged to make at least the minimum payment due each month.

New Window | Help | Customize Page |

Account Details

ID: 88888888 Truman Tiger **Business Unit:** COLUM

Account Number: SAR001 - FS2008 **Account Balance:** 4.16

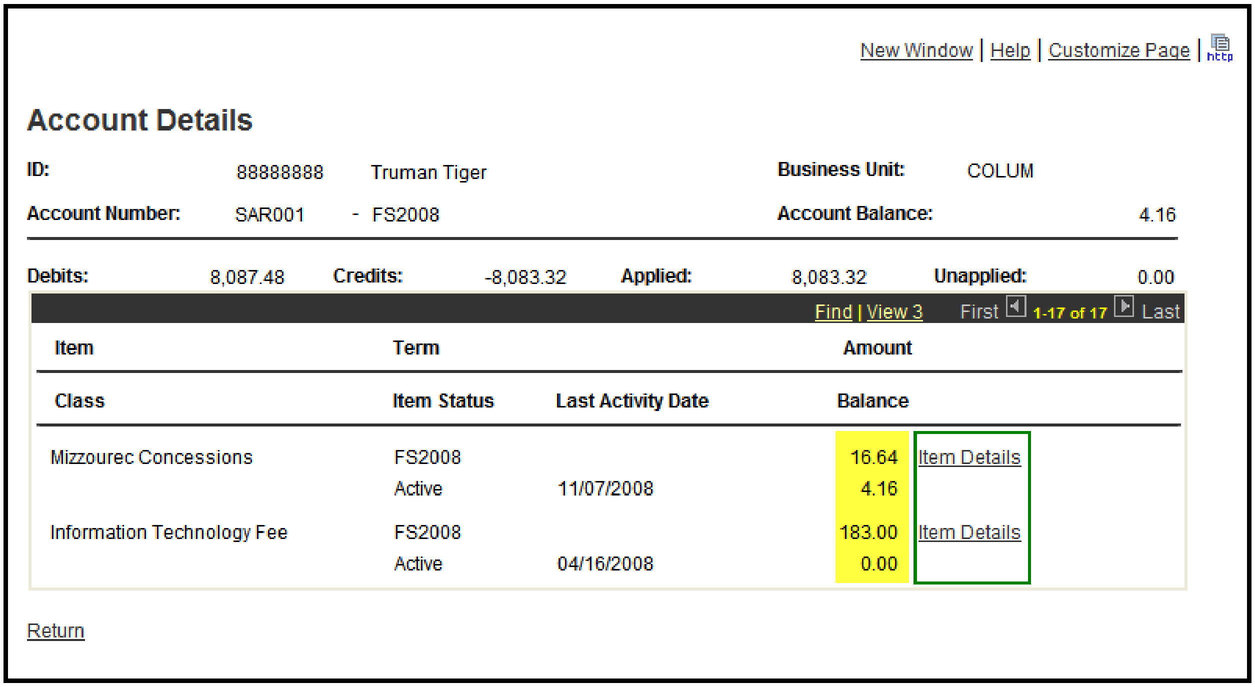
Debits: 8,087.48 **Credits:** -8,083.32 **Applied:** 8,083.32 **Unapplied:** 0.00

Find | View 3 First 1-17 of 17 Last

Item / Class	Term / Item Status	Last Activity Date	Amount / Balance	
Mizzourec Concessions	FS2008		16.64	Item Details
	Active	11/07/2008	4.16	
Information Technology Fee	FS2008		183.00	Item Details
	Active	04/16/2008	0.00	
Education Fee Ugr Res	FS2008		3,684.00	Item Details
	Active	04/16/2008	0.00	
Journalism Course Fee	FS2008		120.90	Item Details
NEWS	Active	04/16/2008	0.00	
Prepaid Health Fee Ugr	FS2008		92.78	Item Details
	Active	04/16/2008	0.00	
Recreation Center Ugr	FS2008		133.11	Item Details
	Active	04/16/2008	0.00	
Student Activity Ugr	FS2008		122.88	Item Details
	Active	04/16/2008	0.00	
Finance Charge	FS2008		46.72	Item Details
	Active	07/24/2008	0.00	
Late Payment Fee	FS2008		10.00	Item Details
	Active	07/24/2008	0.00	

Return

4 Charges	Let's take a closer look at two of the charges on this screen. The first charge is a Mizzourec Concessions charge for $16.64. The $4.16 is the balance still owed against this charge. The second charge is an Information Technology Fee for $183.00. The $0.00 means this charge has been paid.


New Window | Help | Customize Page |

Account Details

ID:	88888888	Truman Tiger	**Business Unit:**	COLUM
Account Number:	SAR001	- FS2008	**Account Balance:**	4.16

Debits:	8,087.48	**Credits:**	-8,083.32	**Applied:**	8,083.32	**Unapplied:**	0.00

Find | View 3 First 1-17 of 17 Last

Item / Class	Term / Item Status	Last Activity Date	Amount / Balance	
Mizzourec Concessions	FS2008		16.64	Item Details
	Active	11/07/2008	4.16	
Information Technology Fee	FS2008		183.00	Item Details
	Active	04/16/2008	0.00	

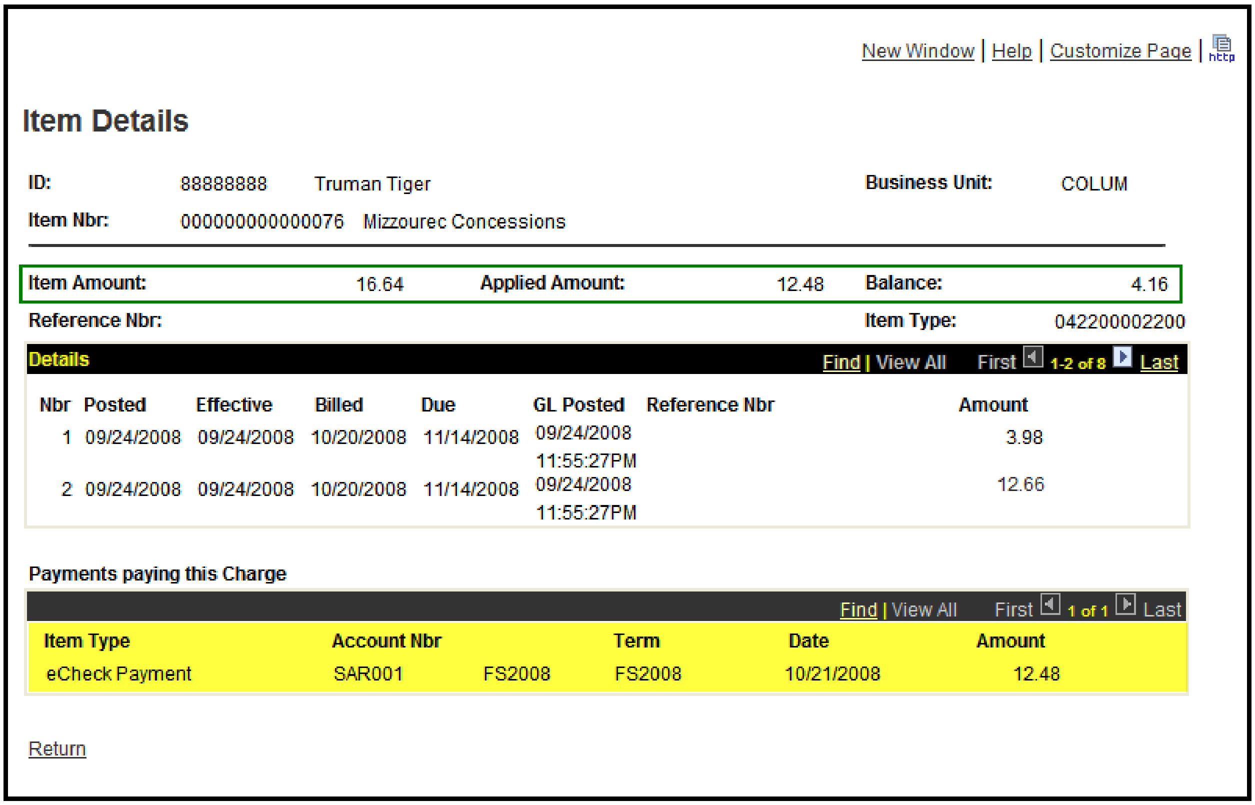
Return

4 Charges

Click **Item Details** across from the Mizzourec Concessions and the **Item Details** screen pops up.

1. **Item Amount** shows the total Mizzourec Concessions charge of $16.64. A payment of $12.48 brought the balance to $4.16.
2. **Details** shows two charges ($3.98 and $12.66) make up the $16.64 Mizzourec Concessions.
3. **Payments paying this Charge** shows an eCheck posted $12.48 against this charge on 10/21/2008.

Note: Remember to check **View All** in both **Details** and **Payments paying this Charge** to see if there are additional postings against the account.



New Window | Help | Customize Page |

Item Details

ID: 88888888 Truman Tiger Business Unit: COLUM

Item Nbr: 000000000000076 Mizzourec Concessions

Item Amount: 16.64 Applied Amount: 12.48 Balance: 4.16

Reference Nbr: Item Type: 042200002200

Details — Find | View All First 1-2 of 8 Last

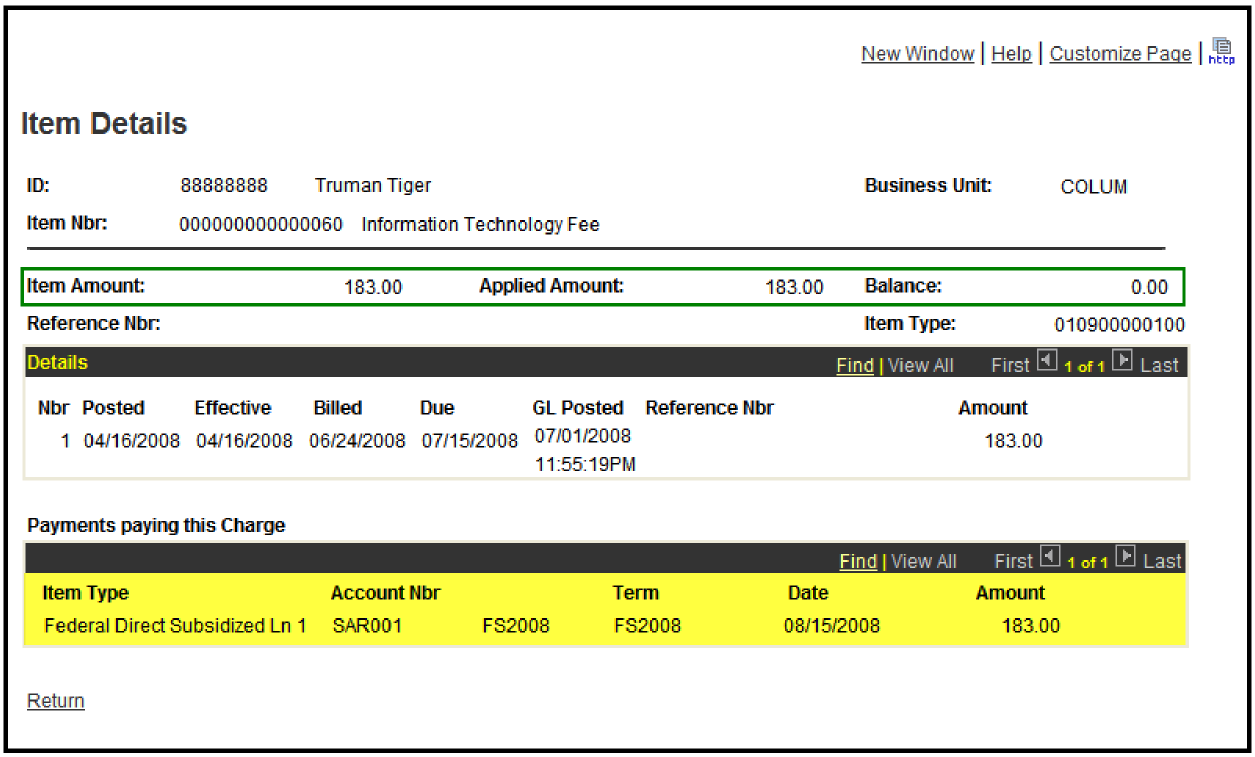
Nbr	Posted	Effective	Billed	Due	GL Posted	Reference Nbr	Amount
1	09/24/2008	09/24/2008	10/20/2008	11/14/2008	09/24/2008 11:55:27PM		3.98
2	09/24/2008	09/24/2008	10/20/2008	11/14/2008	09/24/2008 11:55:27PM		12.66

Payments paying this Charge — Find | View All First 1 of 1 Last

Item Type	Account Nbr		Term	Date	Amount
eCheck Payment	SAR001	FS2008	FS2008	10/21/2008	12.48

Return

4 **Charges**	Click **Item Details** across from the Information Technology Fee and the **Item Details** screen pops up. 1. **Item Amount** shows the total Information Technology Fee charge of $183.00. A payment of $183.00 brought the balance to $0.00. 2. **Details** shows the technology fee is one charge. 3. **Payments paying this Charge** shows a Federal Direct Subsidized Ln 1 posted $183.00 against this charge on 08/15/2008. **Note:** Remember to check **View All** in both **Details** and **Payments paying this Charge** to see if there are additional postings against the account.



New Window | Help | Customize Page | http

Item Details

ID:	88888888	Truman Tiger	**Business Unit:**	COLUM
Item Nbr:	000000000000060	Information Technology Fee		

Item Amount:	183.00	**Applied Amount:**	183.00	**Balance:**	0.00
Reference Nbr:				**Item Type:**	010900000100

Details — Find \| View All — First 1 of 1 Last

Nbr	Posted	Effective	Billed	Due	GL Posted	Reference Nbr	Amount
1	04/16/2008	04/16/2008	06/24/2008	07/15/2008	07/01/2008 11:55:19PM		183.00

Payments paying this Charge

Find \| View All — First 1 of 1 Last

Item Type	Account Nbr		Term	Date	Amount
Federal Direct Subsidized Ln 1	SAR001	FS2008	FS2008	08/15/2008	183.00

Return

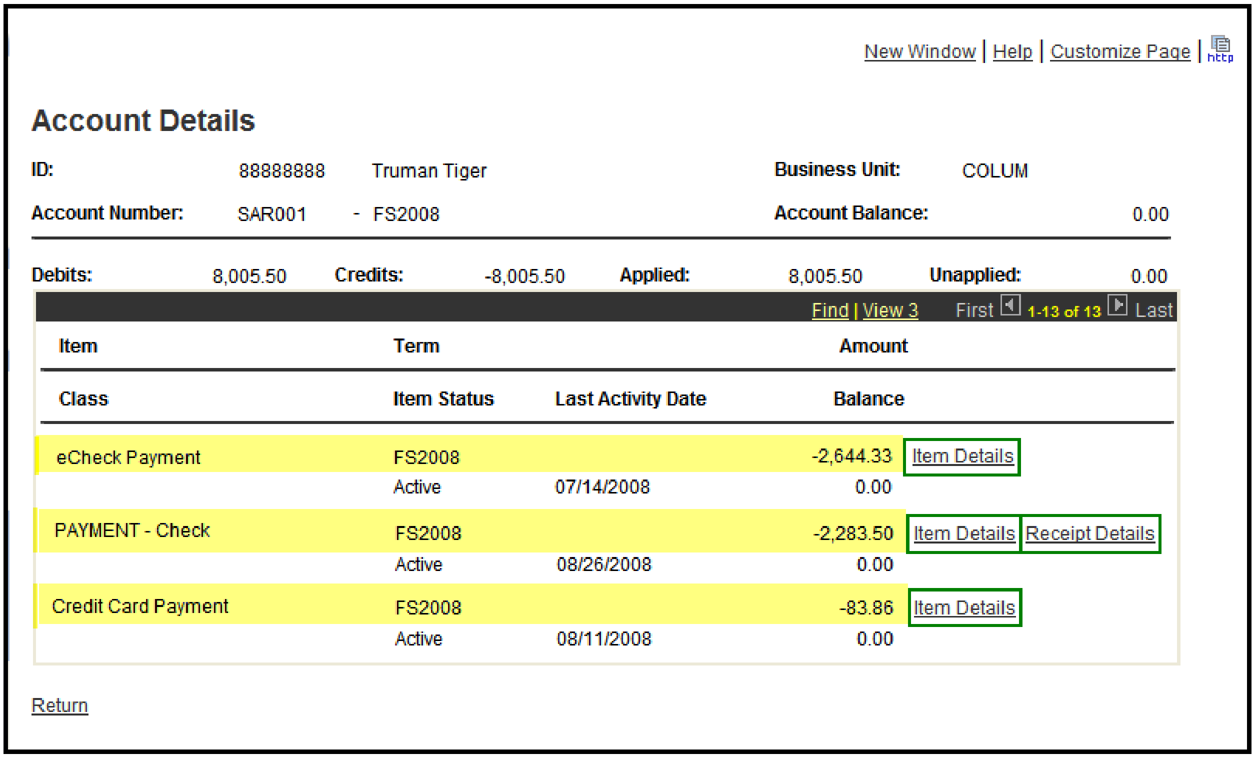
5 Payments

There are four common payment methods on a student account:

1. eCheck
2. Check
3. Credit Card
4. Third Party

The first three are shown below. Third Party payments are addressed separately.

Note: You may see CASH payments, but it is not common.



New Window | Help | Customize Page |

Account Details

ID:	88888888 Truman Tiger	**Business Unit:**	COLUM
Account Number:	SAR001 - FS2008	**Account Balance:**	0.00

Debits: 8,005.50 **Credits:** -8,005.50 **Applied:** 8,005.50 **Unapplied:** 0.00

Find | View 3 First 1-13 of 13 Last

Item / Class	Term / Item Status	Last Activity Date	Amount / Balance	
eCheck Payment	FS2008		-2,644.33	Item Details
	Active	07/14/2008	0.00	
PAYMENT - Check	FS2008		-2,283.50	Item Details Receipt Details
	Active	08/26/2008	0.00	
Credit Card Payment	FS2008		-83.86	Item Details
	Active	08/11/2008	0.00	

Return

5 Payments – eCheck	From the **Account Details** screen, click **Item Details** across from eCheck Payment and the **Payment Line Details** screen pops up. From this screen, you can see: 1. A payment of $2644.33 was applied to Fall Semester 2008. 2. **Account Split for Payment** shows the total eCheck $2650.56 paid charges ($2.32 + $3.91 + $2644.33) in 3 semesters. 3. The date the check posted. 4. The charges the payment paid for Fall Semester 2008.

New Window | Help | Customize Page | http

Payment Line Details

ID:	88888888 Truman Tiger	Business Unit:	COLUM
Item Nbr:	000000000000031 eCheck Payment	Payment ID Nbr:	8

Item Amount:	-2,644.33	Applied Amount:	-2,644.33	Balance:	0.00
Reference Nbr:	794804			Item Type:	091100001500

Account Split for Payment Find | View 2 First 1-3 of 3 Last

Account Nbr	Account Term	Item Term	Item Amount
SAR001	2008 Spring Semester	2008 Summer Semester	-2.32
SAR001	2008 Summer Semester	2008 Summer Semester	-3.91
SAR001	2008 Fall Semester	2008 Summer Semester	-2,644.33

Details Find | View All First 1 of 1 Last

Nbr	Posted	Effective	Billed	Due	GL Posted	Reference Nbr	Amount
1	07/14/2008	07/14/2008	07/24/2008	08/15/2008	07/14/2008 11:55:31PM	794804	-2,644.33

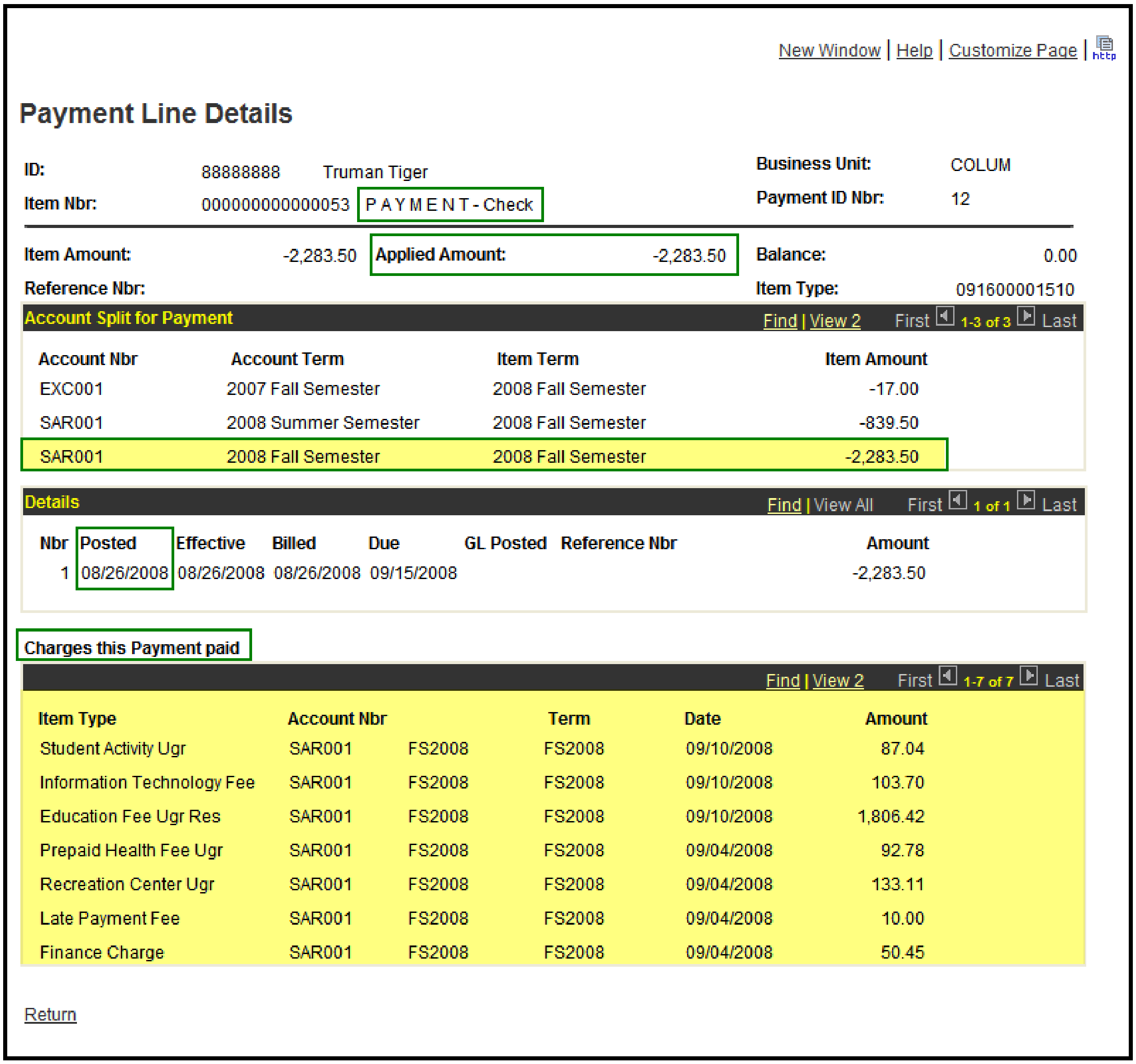
Charges this Payment paid

Find | View 2 First 1-5 of 5 Last

Item Type	Account Nbr		Term	Date	Amount
Prepaid Health Fee Ugr	SAR001	FS2008	FS2008	07/14/2008	92.78
Student Activity Ugr	SAR001	FS2008	FS2008	07/14/2008	112.64
Recreation Center Ugr	SAR001	FS2008	FS2008	07/14/2008	133.11
Information Technology Fee	SAR001	FS2008	FS2008	07/14/2008	134.20
Education Fee Ugr Res	SAR001	FS2008	FS2008	07/14/2008	2,171.60

Return

5 Payments – Check	From the **Account Details** screen, click **Item Details** across from PAYMENT - Check and the **Payment Line Details** screen pops up. From this screen, you can see: 1. A payment of $2283.50 was applied to Fall Semester 2008. 2. **Account Split for Payment** shows the total check $3140.00 paid charges ($17.00 + $839.50 + $2283.50) in 3 semesters. 3. The date the check posted. 4. The charges the payment paid for Fall Semester 2008.



New Window | Help | Customize Page |

Payment Line Details

ID:	88888888 Truman Tiger	Business Unit:	COLUM
Item Nbr:	000000000000053 PAYMENT - Check	Payment ID Nbr:	12
Item Amount:	-2,283.50	Applied Amount:	-2,283.50
Balance:	0.00		
Reference Nbr:		Item Type:	091600001510

Account Split for Payment — Find \| View 2 — First 1-3 of 3 Last

Account Nbr	Account Term	Item Term	Item Amount
EXC001	2007 Fall Semester	2008 Fall Semester	-17.00
SAR001	2008 Summer Semester	2008 Fall Semester	-839.50
SAR001	2008 Fall Semester	2008 Fall Semester	-2,283.50

Details — Find \| View All — First 1 of 1 Last

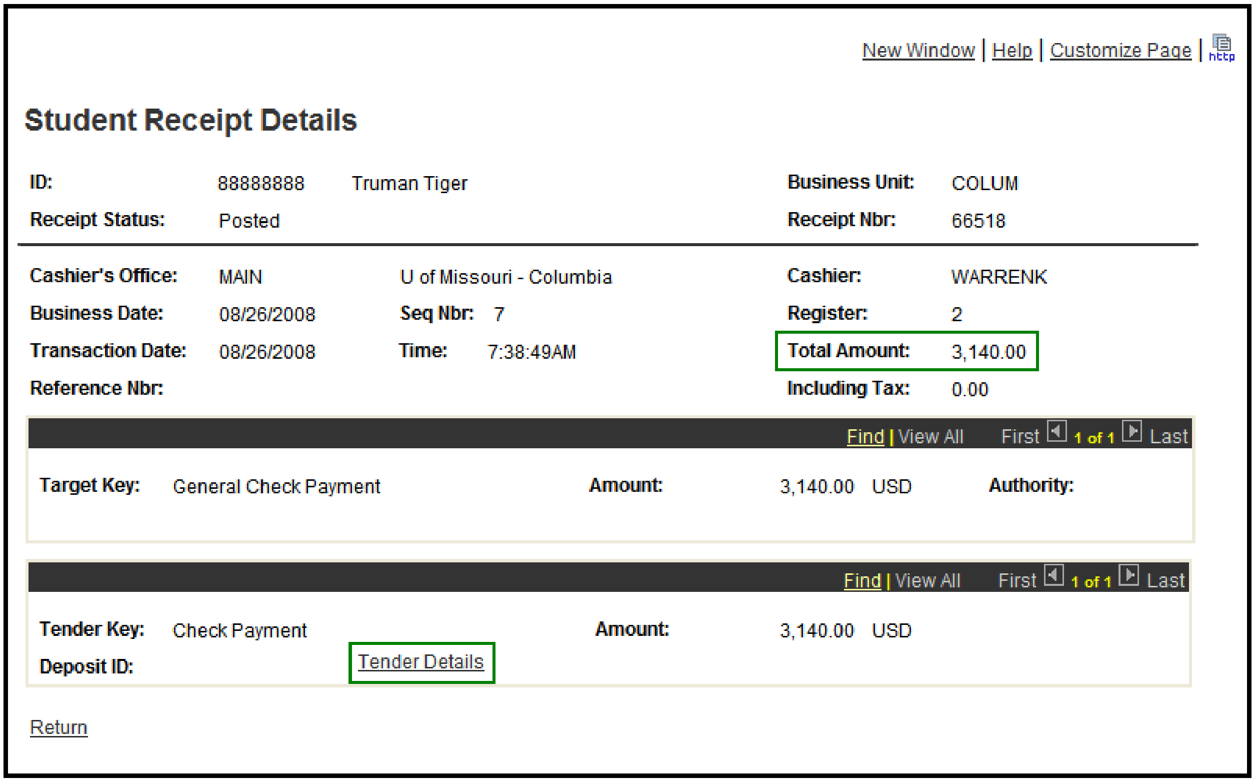
Nbr	Posted	Effective	Billed	Due	GL Posted	Reference Nbr	Amount
1	08/26/2008	08/26/2008	08/26/2008	09/15/2008			-2,283.50

Charges this Payment paid — Find \| View 2 — First 1-7 of 7 Last

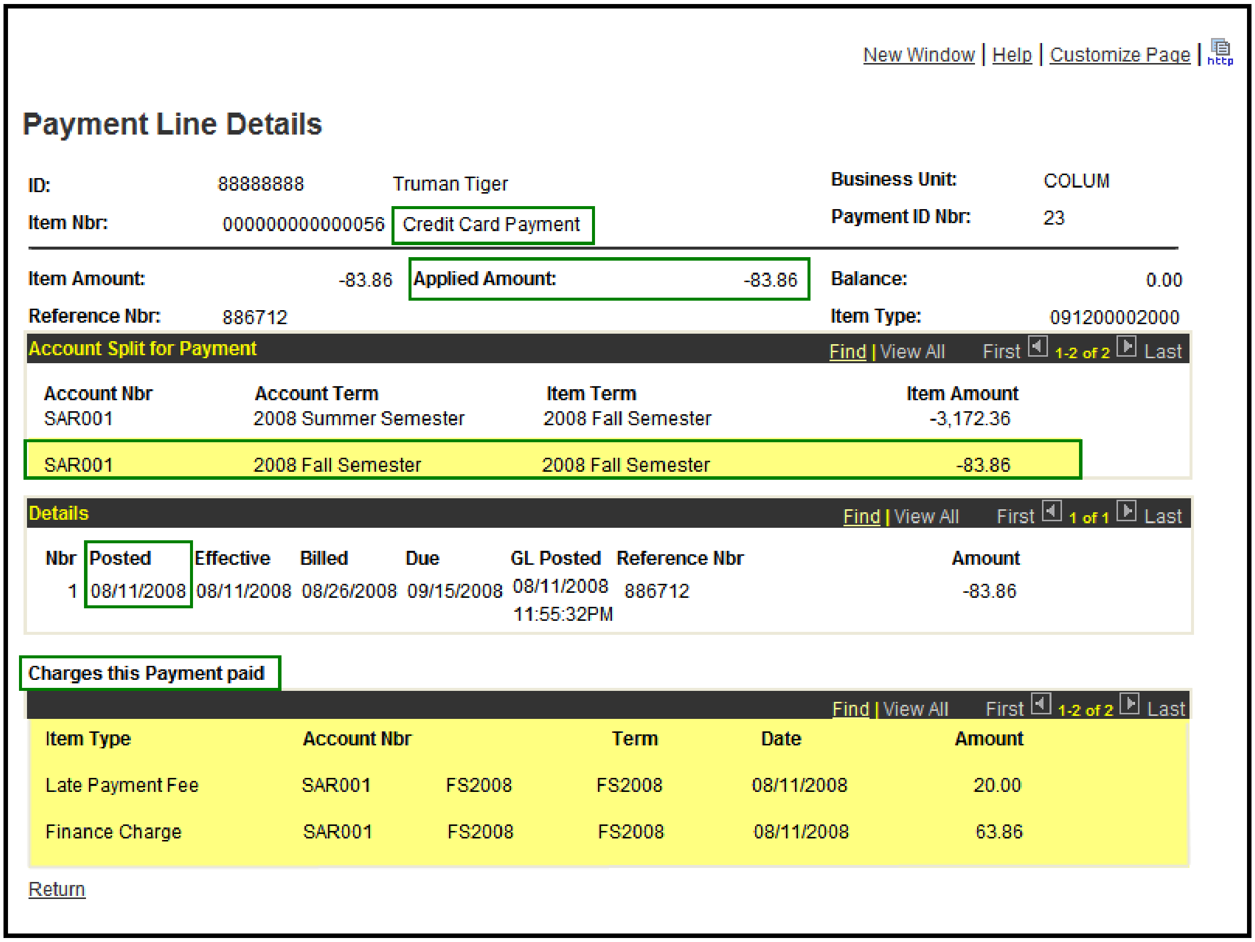
Item Type	Account Nbr		Term	Date	Amount
Student Activity Ugr	SAR001	FS2008	FS2008	09/10/2008	87.04
Information Technology Fee	SAR001	FS2008	FS2008	09/10/2008	103.70
Education Fee Ugr Res	SAR001	FS2008	FS2008	09/10/2008	1,806.42
Prepaid Health Fee Ugr	SAR001	FS2008	FS2008	09/04/2008	92.78
Recreation Center Ugr	SAR001	FS2008	FS2008	09/04/2008	133.11
Late Payment Fee	SAR001	FS2008	FS2008	09/04/2008	10.00
Finance Charge	SAR001	FS2008	FS2008	09/04/2008	50.45

Return

5 Payments – Check	From the **Account Details** screen, click **Receipt Details** across from PAYMENT - Check and the **Student Receipt Details** screen pops up. From this screen, you can see: 1. The total check amount - $3140.00 2. Click **Tender Details** to see the check number.



5 Payments – Credit Card	From the **Account Details** screen, click **Item Details** across from Credit Card Payment and the **Payment Line Details** screen pops up. From this screen, you can see: 1. A payment of $83.86 was applied to Fall Semester 2008. 2. **Account Split for Payment** shows the total credit card payment of $3256.22 paid charges ($3172.36 + 83.86) in 2 semesters. 3. The date the credit card payment posted. 4. The charges the payment paid for Fall Semester 2008.



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Payment Line Details

ID:	88888888	Truman Tiger	Business Unit:	COLUM
Item Nbr:	000000000000056	Credit Card Payment	Payment ID Nbr:	23
Item Amount:	-83.86	Applied Amount: -83.86	Balance:	0.00
Reference Nbr:	886712		Item Type:	091200002000

Account Split for Payment — Find \| View All — First 1-2 of 2 Last

Account Nbr	Account Term	Item Term	Item Amount
SAR001	2008 Summer Semester	2008 Fall Semester	-3,172.36
SAR001	2008 Fall Semester	2008 Fall Semester	-83.86

Details — Find \| View All — First 1 of 1 Last

Nbr	Posted	Effective	Billed	Due	GL Posted	Reference Nbr	Amount
1	08/11/2008	08/11/2008	08/26/2008	09/15/2008	08/11/2008 11:55:32PM	886712	-83.86

Charges this Payment paid — Find \| View All — First 1-2 of 2 Last

Item Type	Account Nbr		Term	Date	Amount
Late Payment Fee	SAR001	FS2008	FS2008	08/11/2008	20.00
Finance Charge	SAR001	FS2008	FS2008	08/11/2008	63.86

Return

5 **Payments – Third Party**	Some payments are made by Third Parties. They are easily identified under **Account Details** because the item starts 'Bill …'. The student provides a letter to the Cashiers' Office from the third party outlining the authorized payment. The Cashiers' Office posts the credit to the student account (as seen below) and then bills the third party for payment.

New Window | Help | Customize Page | http

Account Details

ID: 88888888 Truman Tiger **Business Unit:** COLUM

Account Number: SAR001 - FS2008 **Account Balance:** 0.00

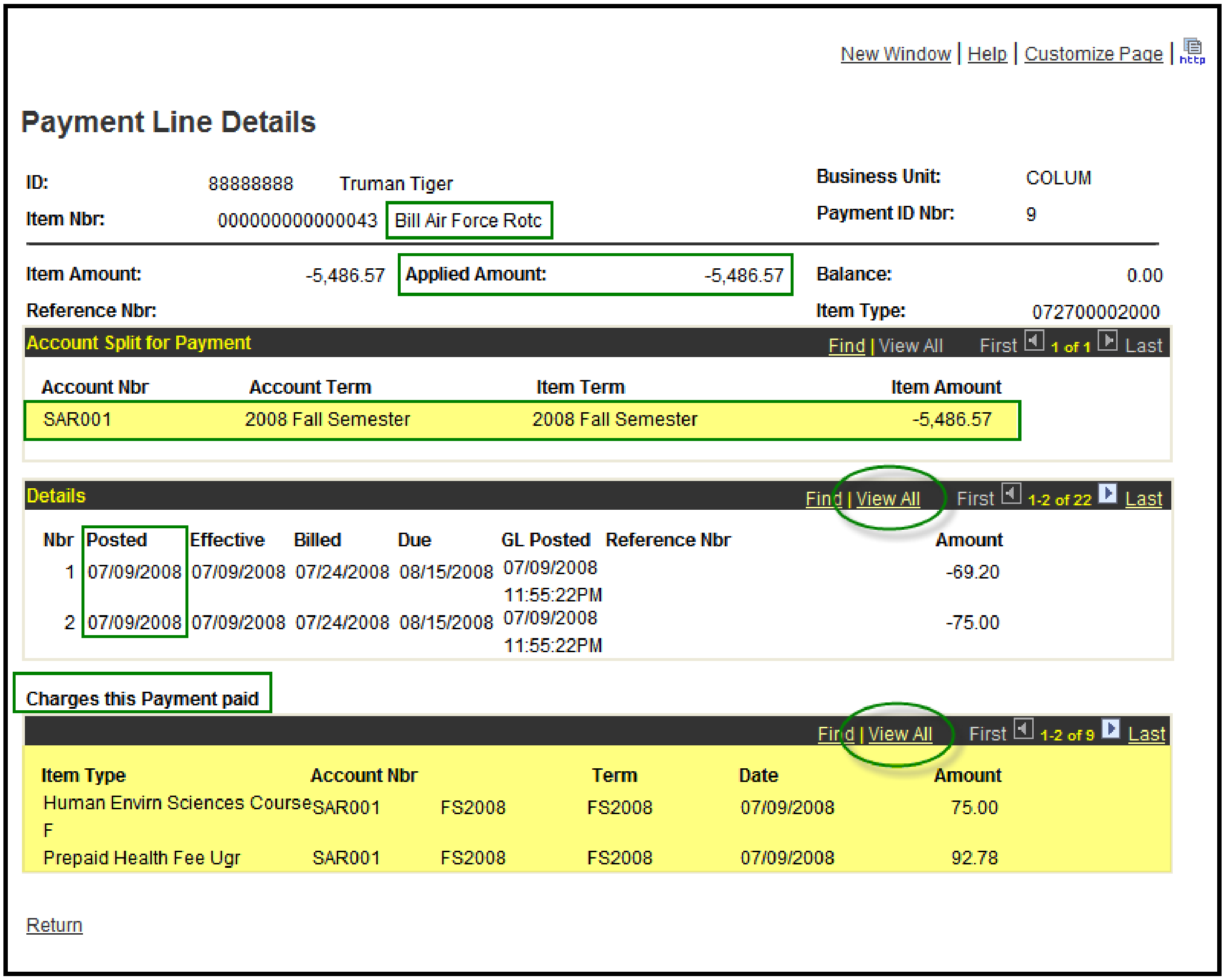
Debits: 6,130.57 **Credits:** -6,130.57 **Applied:** 6,130.57 **Unapplied:** 0.00

Find | View All First 1-3 of 17 Last

Item / Class	Term / Item Status	Last Activity Date	Amount / Balance	
Credit Card Payment	FS2008		-144.00	Item Details
	Active	10/29/2008	0.00	
Bill Air Force Rotc	FS2008		-5,486.57	Item Details
	Active	09/24/2008	0.00	
College Of Ed Cert Course Fee	FS2008		0.00	Item Details
ELEMENTS OF HEALTH EDUC	Active	09/24/2008	0.00	

Return

5 Payments – Third Party	From the **Account Details** screen, click **Item Details** across from Bill Air Force Rotc and the **Payment Line Details** screen pops up. From this screen, you can see: 1. A payment of $5485.57 was applied to Fall Semester 2008. 2. **Account Split for Payment** shows the total Third Party payment of $5485.57. 3. Click **Details View All** to see payment details. 4. Click **Charges This Payment Paid View All** to see charges paid for Fall Semester 2008.



New Window | Help | Customize Page | http

Payment Line Details

ID: 88888888 Truman Tiger

Business Unit: COLUM

Item Nbr: 000000000000043 Bill Air Force Rotc

Payment ID Nbr: 9

Item Amount: -5,486.57

Applied Amount: -5,486.57

Balance: 0.00

Reference Nbr:

Item Type: 072700002000

Account Split for Payment — Find | View All — First 1 of 1 Last

Account Nbr	Account Term	Item Term	Item Amount
SAR001	2008 Fall Semester	2008 Fall Semester	-5,486.57

Details — Find | View All — First 1-2 of 22 Last

Nbr	Posted	Effective	Billed	Due	GL Posted	Reference Nbr	Amount
1	07/09/2008	07/09/2008	07/24/2008	08/15/2008	07/09/2008 11:55:22PM		-69.20
2	07/09/2008	07/09/2008	07/24/2008	08/15/2008	07/09/2008 11:55:22PM		-75.00

Charges this Payment paid — Find | View All — First 1-2 of 9 Last

Item Type	Account Nbr		Term	Date	Amount
Human Envirn Sciences Course F	SAR001	FS2008	FS2008	07/09/2008	75.00
Prepaid Health Fee Ugr	SAR001	FS2008	FS2008	07/09/2008	92.78

Return

6 Financial Aid	Below is a sample of the different types of financial aid transactions that might show up on a student account. The highlighted transactions are refunds to the student. The others are financial aid credited to the student account.

New Window | Help | Customize Page | http

Account Details

ID: 88888888 Truman Tiger Business Unit: COLUM

Account Number: SAR001 - FS2008 Account Balance: 4.16

Debits: 8,087.48 Credits: -8,083.32 Applied: 8,083.32 Unapplied: 0.00

Find | View 3 First 1-17 of 17 Last

Item / Class	Term / Item Status	Last Activity Date	Amount / Balance	
Refund Excess Fin Aid	FS2008		995.00	Item Details
	Active	09/23/2008	0.00	
Fed Direct Unsubsidized Ln 2	FS2008		-995.00	Item Details
	Active	09/16/2008	0.00	
Refund Excess Fin Aid	FS2008		2,639.17	Item Details
	Active	08/18/2008	0.00	
Fed Direct Unsubsidized Ln 1	FS2008		-2,483.84	Item Details
	Active	08/15/2008	0.00	
Federal Direct Subsidized Ln 1	FS2008		-2,737.00	Item Details
	Active	08/15/2008	0.00	
MU Grant - Undergraduate	FS2008		-1,150.00	Item Details
	Active	08/15/2008	0.00	
Wilbur E Garrett Scholarship	FS2008		-175.00	Item Details
	Active	08/15/2008	0.00	
FY08 Tuition Settlement Schlsh	FS2008		-530.00	Item Details
	Active	06/07/2008	0.00	

Return

6 Financial Aid & Refunds	From the **Account Details** screen, click **Item Details** across from <u>Fed Direct Unsubsidized Ln 2</u> and the **Payment Line Details** screen pops up. From this screen, you can see: 1. A loan of $995.00 was applied to Fall Semester 2008. 2. The date the financial aid was posted. 3. The charges the financial aid payment paid for Fall Semester 2008.

New Window | Help | Customize Page | http

Payment Line Details

ID:	88888888	Truman Tiger	**Business Unit:**	COLUM
Item Nbr:	000000000000036	Fed Direct Unsubsidized Ln 2	**Payment ID Nbr:**	11

Item Amount:	-995.00	**Applied Amount:**	-995.00	**Balance:**	0.00
Reference Nbr:				**Item Type:**	082000002020

Account Split for Payment — Find \| View All — First 1 of 1 Last

Account Nbr	Account Term	Item Term	Item Amount
SAR001	2008 Fall Semester	2008 Fall Semester	-995.00

Details — Find \| View All — First 1-2 of 2 Last

Nbr	Posted	Effective	Billed	Due	GL Posted	Reference Nbr	Amount
1	09/16/2008	09/15/2008	09/23/2008	10/15/2008	09/16/2008 11:55:24PM		-100.31
2	09/16/2008	09/15/2008	09/23/2008	10/15/2008	09/16/2008 11:55:24PM		-894.69

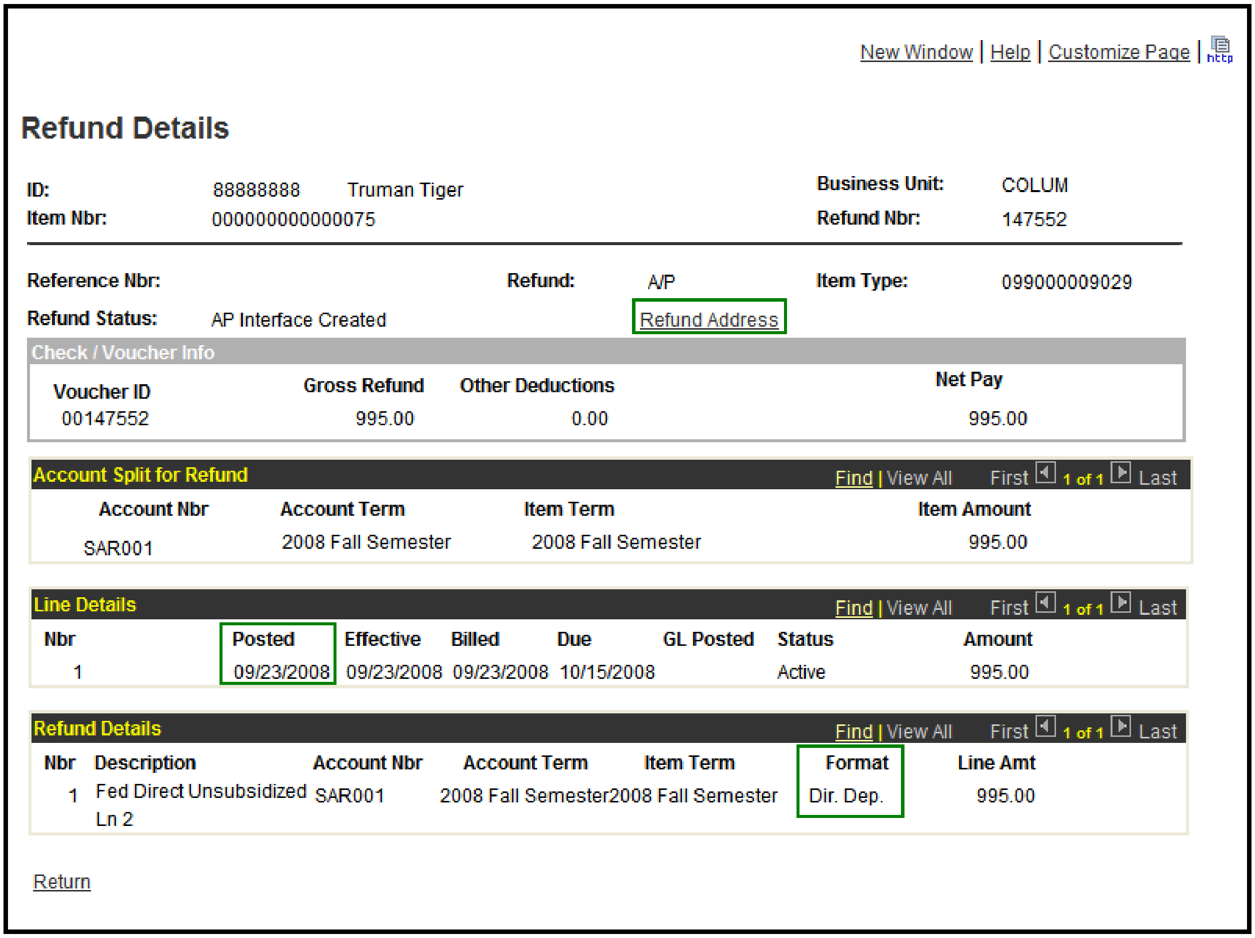
Charges the Financial Aid paid

Find \| View All — First 1-2 of 2 Last

Item Type	Account Nbr		Term	Date	Amount
Bookstore St Sales	SAR001	FS2008	FS2008	09/19/2008	180.90
Refund Excess Fin Aid	SAR001	FS2008	FS2008	09/23/2008	814.10

Return

6 **Financial Aid**	Click **Item Details** across from Refund Excess Fin Aid and the **Refund Details** screen pops up. This screen shows: 1. If the refund was mailed, click **Refund Address** to see the mailing address. Refunds are sent to the local address on the student account. 2. The date the refund posted. 3. Under **Refund Details**, **Format** shows the method of refund. In this case, it was Direct Deposit. If it says Check, it was a paper check.



New Window | Help | Customize Page | http

Refund Details

ID: 88888888 Truman Tiger
Item Nbr: 000000000000075
Business Unit: COLUM
Refund Nbr: 147552

Reference Nbr:
Refund: A/P
Item Type: 099000009029
Refund Status: AP Interface Created
Refund Address

Check / Voucher Info

Voucher ID	Gross Refund	Other Deductions	Net Pay
00147552	995.00	0.00	995.00

Account Split for Refund Find \| View All First 1 of 1 Last

Account Nbr	Account Term	Item Term	Item Amount
SAR001	2008 Fall Semester	2008 Fall Semester	995.00

Line Details Find \| View All First 1 of 1 Last

Nbr	Posted	Effective	Billed	Due	GL Posted	Status	Amount
1	09/23/2008	09/23/2008	09/23/2008	10/15/2008		Active	995.00

Refund Details Find \| View All First 1 of 1 Last

Nbr	Description	Account Nbr	Account Term	Item Term	Format	Line Amt
1	Fed Direct Unsubsidized Ln 2	SAR001	2008 Fall Semester	2008 Fall Semester	Dir. Dep.	995.00

Return

6 **Financial Aid**	**Note:** A credit balance on a student account automatically triggers a refund unless the student requests the credit remain on the account. Direct Deposit refunds typically post to the student bank account 3-5 days after the refund is processed. A mailed refund typically takes 1-2 weeks. Students are encouraged to sign up for Direct Deposit in myZou. **Note:** Most financial aid refunds go directly to the student. The one exception is the Parent Federal Direct Loan, also known as the Parent Plus Program. When this loan is on the account, any financial aid refunds go to the parent first, up to that loan amount. However, the parent can sign papers to say any refund goes to the student.

Congratulations! You have completed "View Customer Accounts"

ATTACHMENT A

Customer Accounts Screen

Defines the fields on the Customer Accounts Screen.

Academic Information	Gives a snapshot of enrollment data / credit hours by term.
	Negative Service Indicator: details negative status of the account. Some of these indicators are generated automatically, some are entered manually. Anyone with access to Student Accounts can view these indicators; security access is needed to apply an indicator.
	Positive Service Indicator: details positive status of the account. These indicators are entered manually. Anyone with access to Student Accounts can view these indicators; security access is needed to apply an indicator.
	Denotes a field used to post Communications. This is not used much.
	Denotes a field used to post Checklists. This is used by Financial Aid.
	Denotes a field used to post Comments. This is used by different departments. Security access is needed to create and view comments.
Total	The total balance due as of today.
Anticipated Aid	Financial aid expected, but not yet paid to student's account. It can be for the current term or a future term.
Account Type	All are Accounts Receivable.
Account Number	Charges and credits are grouped into categories to enable accounting flexibility.
Balance	Amount due against a specific account number.
Open Date	First date of an entry against a specific account number.
Account Details	Lists charges and payments by term.
GO TO fields at the bottom of the screen give alternate views of account detail information:	
• **Detail Trans**	Lists each transaction including description and amount sorted by account number and then term.
• **Item Summary**	Lists each transaction sorted by item type.
• **Items by Term**	Lists each transaction sorted by term.
• **Items by Date**	Lists each transaction sorted by date posted.
• **Due Charges**	Lists transactions with an unpaid amount sorted by due date.
• **Payment Plans**	Provides information on Third party / sponsor credits.
• **View Anticipated Aid**	Gives a snapshot of anticipated aid – aid not yet posted to student's account. It can be for the current term or a future term. This link is not visible when no financial aid is pending.

ATTACHMENT B

Positive & Negative Indicators

Positive & Negative Indicators are designated by and . Anyone having access to **Student Accounts** can view an indicator; security access is needed to apply an indicator.

123	Test Service Indicator	
C01	Do Not Put in Collections	
C02	Past Due	T
C03	60 Days Past Due	T
C04	90 Days Past Due	T
C05	Past Due Cashiers CA	T,R
C10	Past Due WO	T,R
C11	Past Due - Stop Registration	T,R
C12	Cashiers - Stop Registration	T,R
C20	No Student Bill	
C21	No Interest	
C22	No Late Fee	
C23	Agreement	
C24	Paper Bill Request	
C26	Paper Bill - No Nelnet	
C30	Manual Do Not Refund	
C31	Edit Program Do Not Refund	
C32	Override Refund Edit Program	
C40	Do Not Cancel	
C44	No Checks	T
C45	ResLIfe Cntrct Paid by Fin Aid	
C46	Other Hold	T
C47	Fin Hold B	T
C48	Bankruptcy Discharged	

C50	MU Direct	T
C51	MU Direct	R
C55	No Electronic Payments Allowed	
C80	Active Duty	
C81	Fin Hold BI	T
C82	Fin Hold BF	T
C83	Past Due CA I - Stop Regis	T,R
C84	Past Due CA F - Stop Regis	T,R
C85	Past Due CA I MD - Stop Regis	T,R
C86	Past Due CA F MD - Stop Regis	T,R
C87	Past Due L	T
C88	Past Due ED - Stop Regis	T,R
C89	Past Due WO I - Stop Regis	T,R
C90	Past Due WO F - Stop Regis	T,R
C91	Missing Loan Documents	T
C92	Past Due L I 90 - Stop Regis	T,R
C93	Past Due L F 90 - Stop Regis	T,R
ELE	English Language Exam Reqd	R
ENA	No Response to e-Consent	
ENC	Did Not Agree to e-Consent	
FIG	FIGS Registration Hold	R
FLN	Convicted Felon	
IMM	Immunization Hold	R
INT	Intl Center Check-In Required	R

T – Hold on Transcripts
R – Student cannot register for courses

ATTACHMENT B

Positive & Negative Indicators

MIL	Military Deployment	
NCN	Not cancel for finance reasons	
NCV	Acad Record Not Converted	T
R01	Arts and Science	R
R02	Arts and Science - Probation	
R03	Arts and Science - PSI	
R04	Registration Hold	R
R05	College of Business	R
R06	College of Business - PSI	
R07	Ag, Food & Nat Resources	R
R14	College of Education	R
R15	College of Education Probation	
R17	College of Engineering	R
R18	College of Engineering	
R21	School of Natural Resources	R
R23	Health Professions	R
R24	Human Environmental Science	R
R27	School of Journalism	R
R31	School of Law	R
R37	School of Medicine	R
R3P	Third Party Permission	
R47	School of Nursing	R
R56	Social Work	R

R57	School of Veterinary Medicine	R
R60	Graduate School	R
R68	University Registrar	R
R69	University Registrar	R
R70	University Registrar	T
R80	Provost	R
R81	Student Affairs	R
R82	Admissions	R
R83	MU Direct	R
R84	Center for Dist and Ind Study	R
R85	UMKC Pharmacy	R
RSW	Summer Welcome	R
SHL	Student Health	R
TRD	Trio Designated	
TRE	Trio Eligible	
TRP	Possibly Trio Elig Refer to LC	
U01	Deceased	R
U02	Dismissed Student	R
U03	Expelled Student	R
U04	Suspended Student	R
U05	Financial Indicator	R
U06	Loan Indicator	R
WOF	Student Account Write Off	T,R

T – Hold on Transcripts
R – Student cannot register for courses