INDIANA UNIVERSITY

SIS Course Training Guide

Student Financials
Customer Services for Departmental Staff

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Course Objectives

Upon completion of this training, participants will know how to:

- Access Student Financials pages in SIS.
- View a student's account summary.
- View a student's account detail.
- View a student's payment line detail.
- View a student's account information via the Global Account View.
- View a student's anticipated aid.
- View Bio/Demo data for a student.
- View positive and negative Service Indicators.
- Identify FERPA Restrictions.

Online Help Review

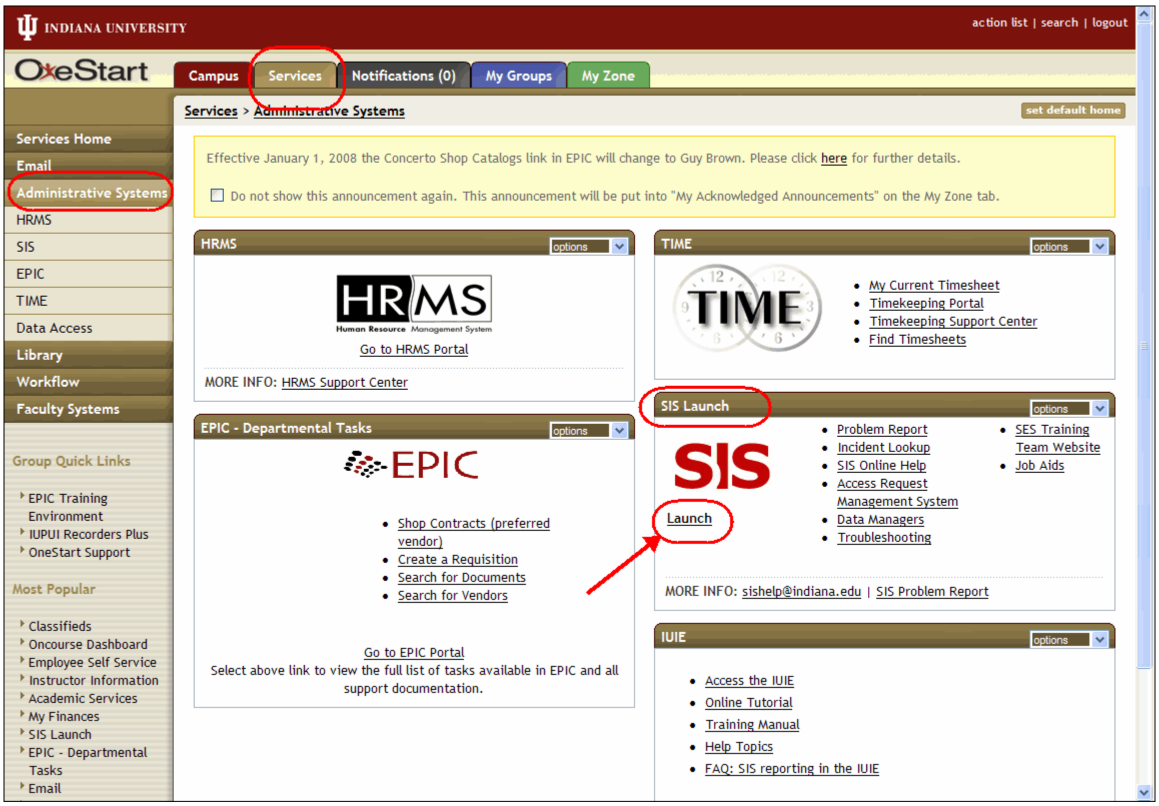
- Open Internet Explorer and navigate to:
  http://ses.indiana.edu/campusServices/sisTraining/SIS9.0_onlineHelp/

- Click the appropriate link in the menu on the left side or on the main page.
- Click on the appropriate link for the topic you want to view.
- To search the Online Help, click on **Search SIS 9.0 Training** in the left side menu.

Accessing Student Financials Pages

Log in to OneStart (www.onestart.iu.edu) then sign in to SIS to access the Student Financials pages covered in this training guide.

1. To launch the SIS application, navigate to the *Services* tab.
2. Click **Administrative Systems** in the left side menu.



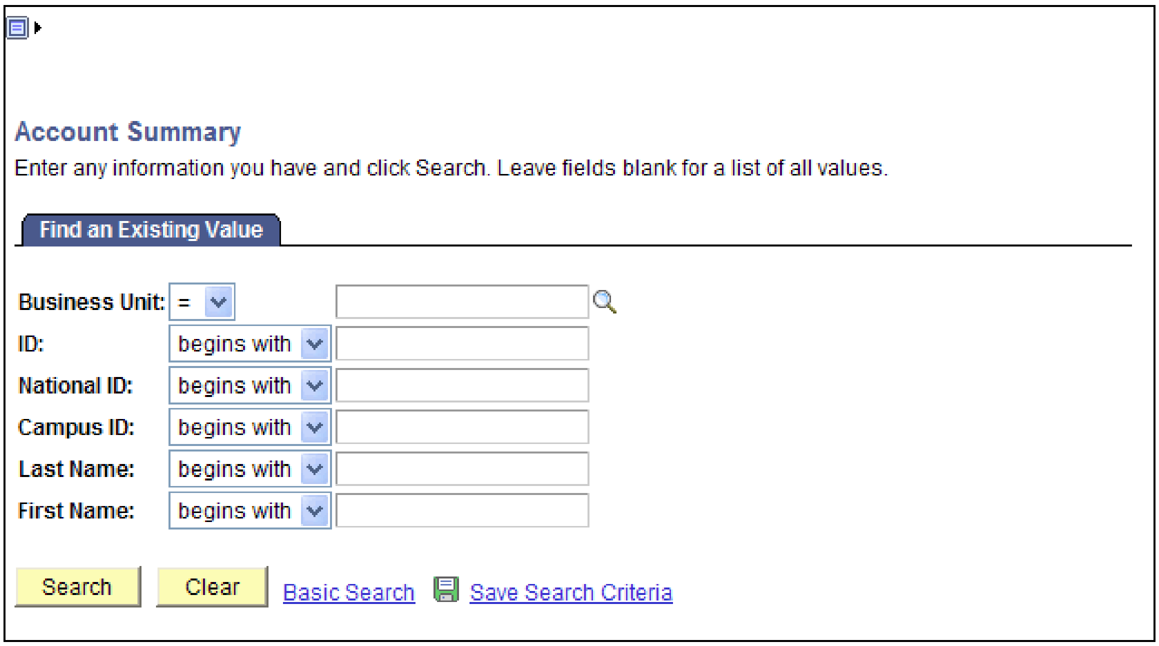
3. Locate the **SIS Launch** box and click Launch.
4. You will be asked to log in using a safeword card (if you have not done so already).
5. Once you are logged into the SIS application, you will be taken to the **Administrative Center**. From here, you can navigate to the appropriate Student Financials pages in the main menu as described in this manual.

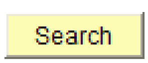
Account Summary

The *Account Summary* page enables you to view a summary of a student's account and displays information for only one Business Unit (Institution code) at a time.

NOTE:	Your access to these navigation paths will depend on your individual security.

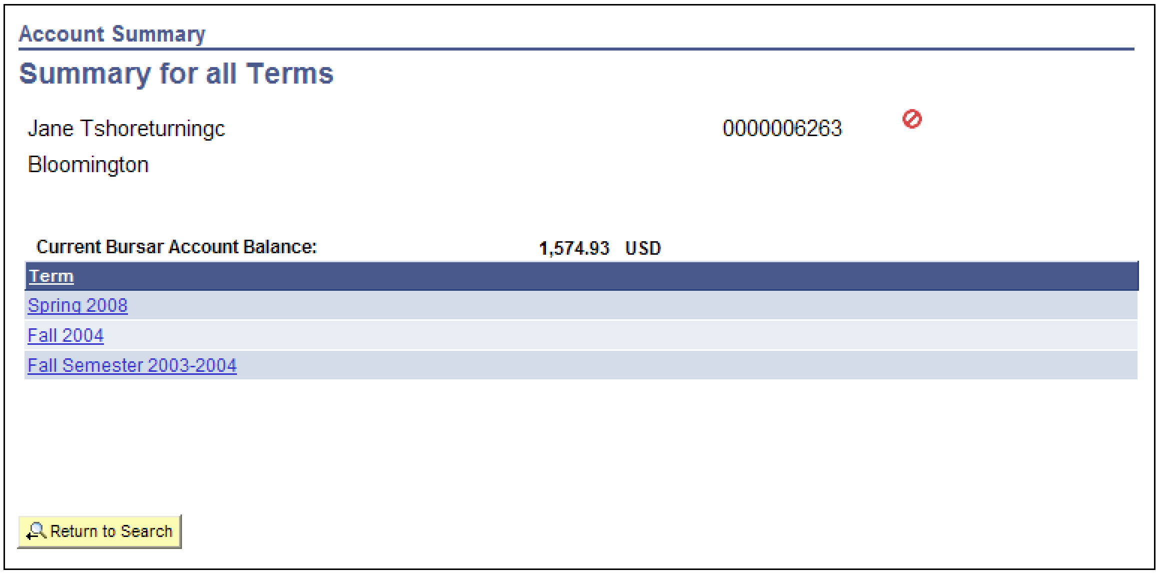
Navigation: **Student Financials > View Account Summary**



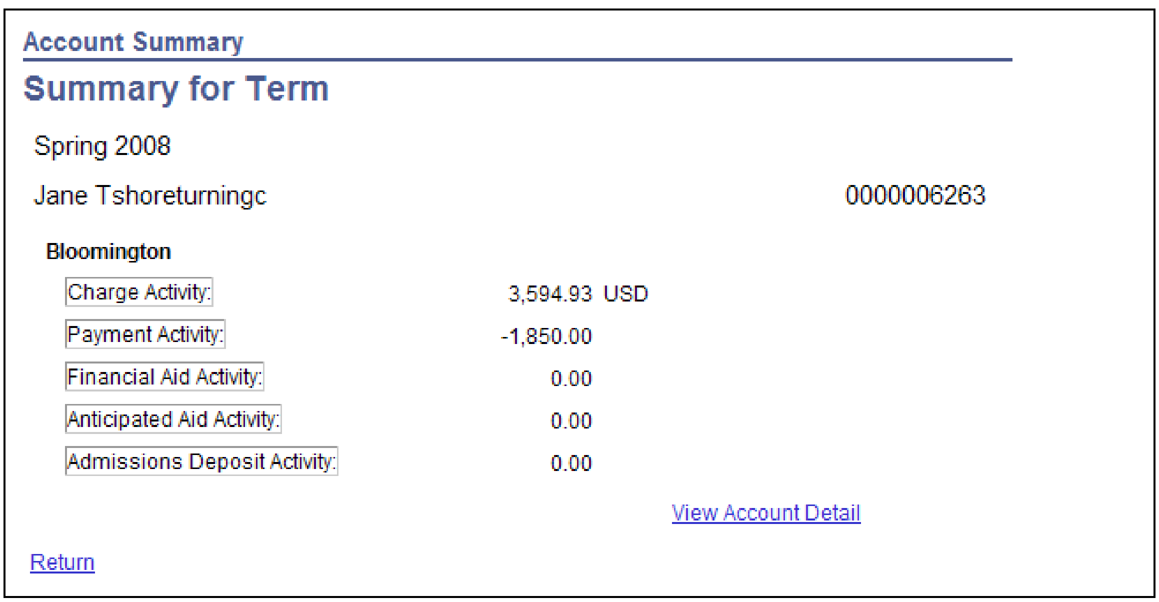
1. The *Account Summary - Find an Existing Value* page will be displayed. Enter the student's **Business Unit**. This is the 5-character campus code (i.e., IUINA).
2. Enter the student's **ID** (or **Last** and **First Name**).
   The **ID** is the student's ten-digit system assigned identification number.
3. Click 

   to view the *Account Summary – Summary for all Terms* page.

   This page allows you to view a student's account summary for all academic terms in which the student has activity.



4. When the *Account Summary – Summary for all Terms* page is displayed, review **Student Name** and review **Student ID**.
5. Review **Current Bursar Account Balance**. This is the full balance of the student's entire account.
6. Review **Term** and click the link for the appropriate term to view a student's account summary for a specific term and business unit.



7. The **Term** listed at the top of the page is the academic term for which the account summary applies.
8. Review **Student Name** and **ID**.
9. Review **Campus**. This is the campus the student incurred the charges at for the term listed.
10. Review **Charge Activity**. This is the total charges the student has incurred in that term.

11. Review **Payment Activity**. This is the total payment amount received from the student in that term.
12. Review **Financial Aid Activity**. This is the total amount of financial aid received for the student in that term.
13. Review **Anticipated Aid Activity**. This is the total amount of financial aid awarded to, but not yet disbursed to the student in that term.
14. The **Admissions Deposit Activity** is **not** used at IU at this time. Some departments do require pre-payments and they show up under the payment area.
15. Click the View Account Detail link to move to the *Account Summary – Account Detail for Term* page to view detailed information for each of the categories listed on the *Summary for Term* page. This page lets you view line items of account activity for a single term.

Account Summary

Account Detail for Term

Spring 2008 | As of Date 01/16/2008

Jane Tshoreturningc | 0000006263

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Bloomington

Charges

Date Posted	Item Description	Amount	
12/20/2007	Activity Fee	58.87	USD
12/20/2007	Athletics Fee	15.00	
12/20/2007	Late Registration Fee	210.00	
12/20/2007	Resident Undergraduate Fees	2,993.10	
12/20/2007	Student Health Fee	87.96	
12/20/2007	Technology Fee	200.00	
12/20/2007	Transportation Fee	30.00	

Total Charges: 3,594.93 USD

Payments Received

Date Posted	Item Description	Amount	
01/16/2008	Payment - Thank You	-350.00	USD
01/16/2008	Payment by Check	-1,000.00	
01/16/2008	Payment by Cash	-500.00	

Total Payments: -1,850.00 USD

Self Service Pending Payments

Reference Number	Card Number's Last Four Digits	Amount	
		0.00	

Total Pending Payments: 0.00 USD

Financial Aid

Date Posted	Item Description	Amount	
		0.00	

Total Financial Aid: 0.00 USD

Anticipated Aid

Item Description	Anticipated Aid	
	0.00	

Total Anticipated Aid: 0.00 USD

Admissions Deposit Due

Short Description	Description	Due Amount	
		0.00	

Total Admissions Deposit: 0.00 USD

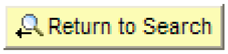
Refunds

Status	Long Name	Item Amount	

Total Refunds: 0.00 USD

Return

1. The **Term** listed at the top of the page is the term (semester) the information is for.
2. Review **As of Date**. This is the last date the information was updated.
3. Review **Student Name** and **ID**.
4. Review **Campus**. The campus this account information is specific to.
5. Review **Charges** information. These fields display charges on the account for the term.
   - Review **Date Posted**. This is the date the charge was posted to the account.
   - Review **Item Description.** This is a description of the charge posted to the account.
   - Review **Amount**. This is the dollar amount of the charge posted to the account.
6. Review **Total Charges**. This is the total dollar amount of all combined charges on the account for the term.
7. Review **Payments Received** information. These fields display payments applied to the account for the term.
   - Review **Date Posted**. This is the date the payment was posted to the account.
   - Review **Item Description.** This is a description of the payment posted to the account.
   - Review **Amount**. This is the dollar amount of the payment posted to the account.
8. Review **Total Payments**. This is the total dollar amount of all combined payments on the account for the term.
9. Review **Self-Service Pending Payments** information. IU is using infiNET QPay as our self service vendor. Payments made via QPay or immediately posted to the account.
10. Review **Total Pending Payments**. This will always be zero at IU is using infiNET Qpay with immediate credit to the account.
11. Review **Financial Aid** information. These fields display any financial aid on the account for the term.
    - Review **Date Posted**. This is the date the financial aid was posted to the account.
    - Review **Item Description**. This is a description of the financial aid posted to the account.
    - Review **Amount**. This is the dollar amount of the financial aid posted to the account.
12. Review **Total Financial Aid**. This is the total dollar amount of all combined financial aid received on the account for the term.
13. Review **Anticipated Aid** information. These fields display any financial aid anticipated for the account for the term. If the expire date of the anticipated aid is before the current date, the aid does not appear on this page.
    - Review **Item Description**. This is a description of the anticipated aid item.
    - Review **Anticipated Aid**. This is the dollar amount of the anticipated aid item.
14. Review **Total Anticipated Aid**. This is the total dollar amount of all combined anticipated aid items for the term.
15. The **Admissions Deposit Due** information fields will **not** be used by IU at this time.
16. Review **Refunds** information. These fields display any refunds applied to the account for the term.
    - Review **Refund Nbr**: This number is automatically assigned in SIS.
    - Review **Status**. The status of the refund being applied to the account.
    - Review **Long Name**.
    - Review **Address Type**. The actual address selected from the refund page.
    - Review **Item Amount**. The dollar amount of the refund being posted to the account.

17. Review **Total Refunds**. This is the total dollar amount of all combined refunds posted to the account for the term.
18. Click the Return link to return to the *Summary for Term* page.
19. Click the Return link to return to the *Summary for all Terms* page.
20. Click 

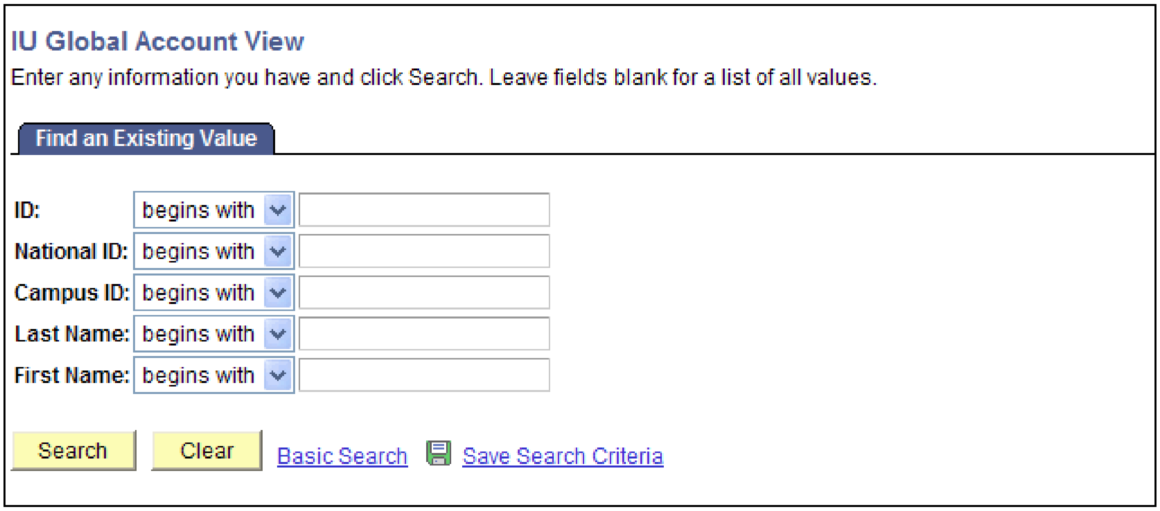
to view the Account Summary data for another student.

Try It - Complete Account Summary exercise 1 and exercise 2 in the workbook.

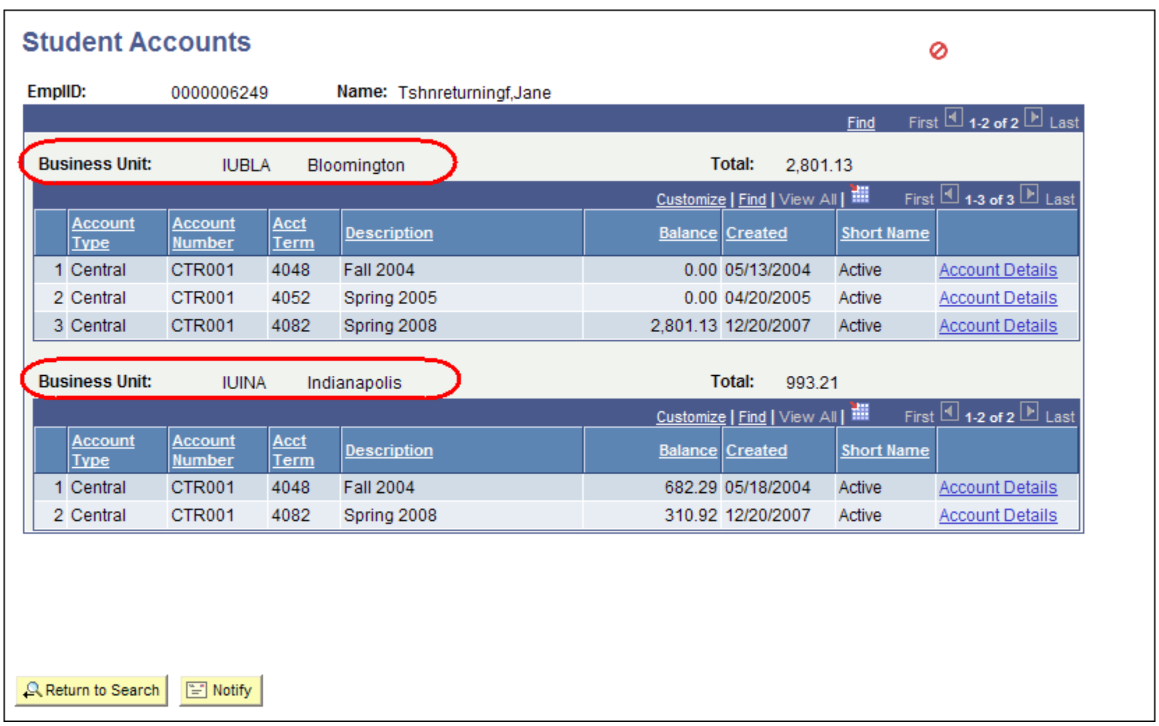
IU Global Account View

The *IU Global Account View – Student Accounts* page is used to view overall activity on a student's account. This account view allows you to access all account history for a multi-campus customer.

Navigation: **Student Financials > IU Global Account View**



1. Enter the student's **ID** (or **Last** and **First Name**).
2. Click Search.

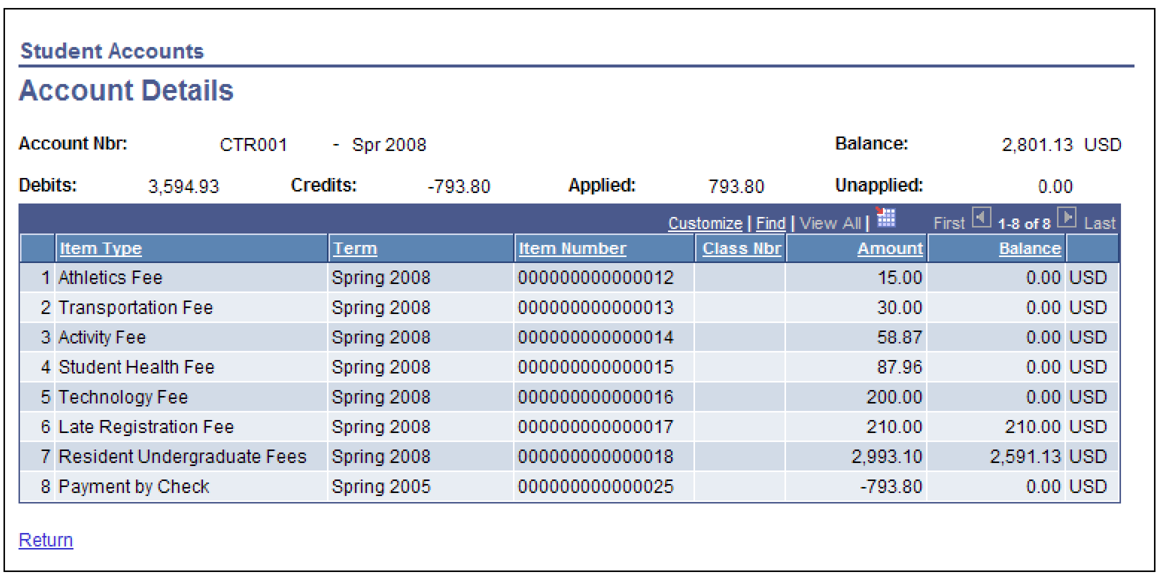


	Account Type	Account Number	Acct Term	Description	Balance	Created	Short Name	
1	Central	CTR001	4048	Fall 2004	0.00	05/13/2004	Active	Account Details
2	Central	CTR001	4052	Spring 2005	0.00	04/20/2005	Active	Account Details
3	Central	CTR001	4082	Spring 2008	2,801.13	12/20/2007	Active	Account Details

	Account Type	Account Number	Acct Term	Description	Balance	Created	Short Name	
1	Central	CTR001	4048	Fall 2004	682.29	05/18/2004	Active	Account Details
2	Central	CTR001	4082	Spring 2008	310.92	12/20/2007	Active	Account Details

NOTE:	The newest rows of information are always displayed at the bottom of the grids.

1. Review **EmplID**. This field displays the student's **ID** and the student's **Name**.
2. Review **Business Unit**. This field displays the campus code for the campus the student is enrolled at.
3. Review **Total**. This is the student's current outstanding balance for that campus. This balance includes the fees for the current term and all prior terms' unpaid fees.
4. Review **Account Type**. This field displays the type of account the charge or payment is for.
5. Review **Account Number**. The account number assigned to the line item by the SIS Student Financials application.
6. Review **Acct** (Account) **Term**. This field displays the 4-character term code.
7. Review **Description**. This field displays the term description.
8. Review **Balance**. This is the student's total charges due for each term.
9. Review **Created** date. This is the first activity date (transaction date) for this term.
10. Review **Short Name**. At IU this will always be "Active".
11. Click the Account Details link to move to the *Account Details* page.


Student Accounts

Account Details

Account Nbr: CTR001 - Spr 2008 Balance: 2,801.13 USD

Debits: 3,594.93 Credits: -793.80 Applied: 793.80 Unapplied: 0.00

Customize | Find | View All | First 1-8 of 8 Last

	Item Type	Term	Item Number	Class Nbr	Amount	Balance	
1	Athletics Fee	Spring 2008	000000000000012		15.00	0.00	USD
2	Transportation Fee	Spring 2008	000000000000013		30.00	0.00	USD
3	Activity Fee	Spring 2008	000000000000014		58.87	0.00	USD
4	Student Health Fee	Spring 2008	000000000000015		87.96	0.00	USD
5	Technology Fee	Spring 2008	000000000000016		200.00	0.00	USD
6	Late Registration Fee	Spring 2008	000000000000017		210.00	210.00	USD
7	Resident Undergraduate Fees	Spring 2008	000000000000018		2,993.10	2,591.13	USD
8	Payment by Check	Spring 2005	000000000000025		-793.80	0.00	USD

Return

1. Review **Account Nbr** (Number). The account number assigned to the line item by the SIS Student Financials application.
2. Review **Balance**. This is the total outstanding balance the student owes on the account.
3. Review **Debits**. This is the total amount of debits to the account.
4. Review **Credits**. This is the total amount of credits to the account.
5. Review **Applied**. This field displays the total amount of payments received and applied to the account.
6. Review **Unapplied**. This field displays the total amount of payments received but not yet applied to the account. An example of this would be if a student has no housing charges, but

they had paid $100 housing deposit. This deposit is restricted to pay housing only and since they have no housing charge, it would show up in the **Unapplied** field.

7. Review the following for each line item:

   - **Item Type**: The name or description of the line item.
   - **Term**: The term the line item was applied to the account.
   - **Item Number**: The system-assigned item number associated with the line item.
   - **Class Nbr:** This field is not used at this time.
   - **Amount**: The dollar amount of the line item.
   - **Balance**: The dollar amount still outstanding on a student's account after all debits and credits have been applied.

8. Click the Return link to return to the *IU Global Account View -Student Accounts* page.

Try It - Complete IU Global Account View exercise 1 in the workbook.

View Anticipated Aid

Basic Concepts (For all Student Service Offices)

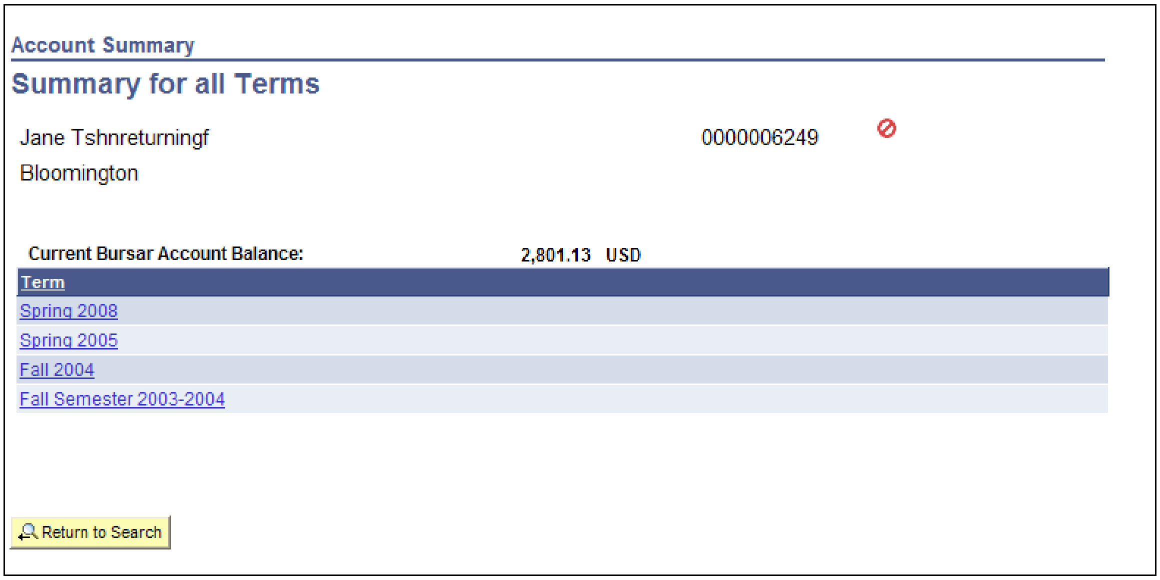
- Awarded aid may be “anticipated” on the student account prior to when disbursement actually occurs. This allows the ability to generate a “net” bill with anticipated aid for the term subtracted from the billed charges.
- When aid is disbursed, cancelled or expires it no longer appears as anticipated aid.
  - Anticipated aid expires 30 days after the 1st disbursement date of a term or 30 days after the award date, whichever date is later.

Advanced Concepts (For Financial Aid and Enrollment Services Offices)

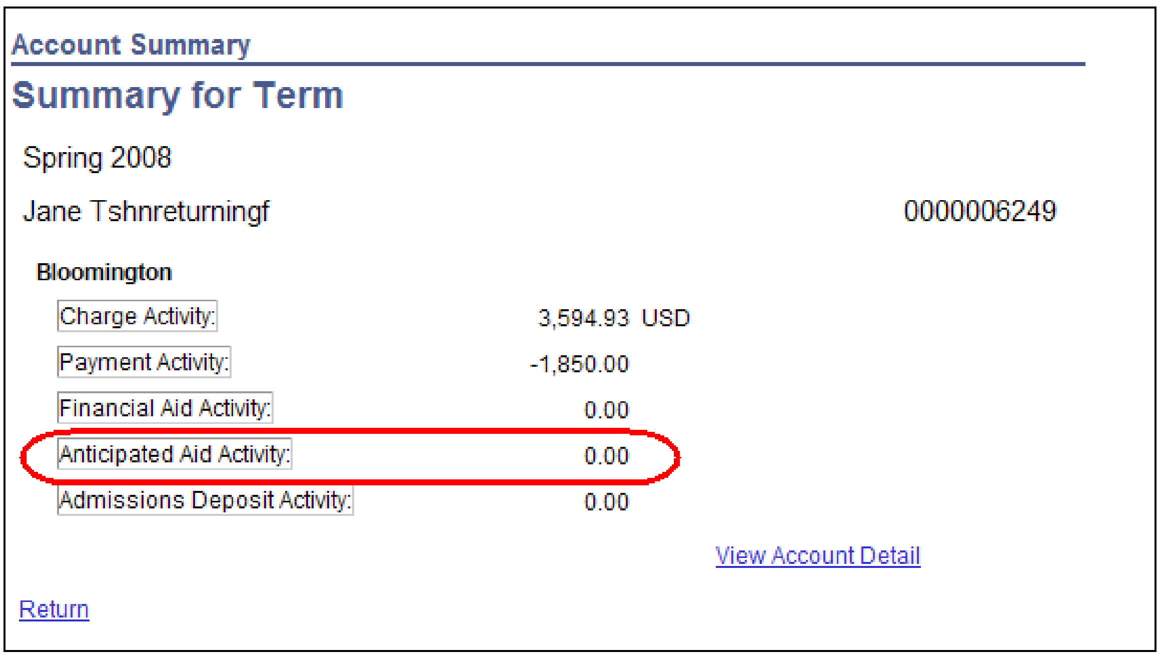
- If a student has not met the eligibility criteria for the award, the anticipated aid could continue to appear as anticipated aid until it expires.
- Individual awards can be “expired” manually.
- When cash awards from a particular outside donor are “estimated” based on lists from the donor, these awards may be anticipated if the live award will auto-delete the “estimated” award.
- All item types for live aid should be anticipated with the exception of fee remissions.
- Fee remissions other than SSACI, HEA, AH and CORE 40 should never be anticipated.

Navigation: **Student Financials > View Account Summary**

1. Enter the **Business Unit**.
2. Enter the student’s **ID** (or **Last** and **First Name**).
3. Click Search.



4. Click the link for the appropriate Term.



5. The **Anticipated Aid Activity** shows the total aid. Click the View Account Detail link to view detailed activity.

Account Summary

Account Detail for Term

Spring 2008 **As of Date** 01/16/2008

Jane Tshnreturningf 0000006249

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Bloomington

Charges

Date Posted	Item Description	Amount	
12/20/2007	Activity Fee	58.87	USD
12/20/2007	Athletics Fee	15.00	
12/20/2007	Late Registration Fee	210.00	
12/20/2007	Resident Undergraduate Fees	2,993.10	
12/20/2007	Student Health Fee	87.96	
12/20/2007	Technology Fee	200.00	
12/20/2007	Transportation Fee	30.00	

Total Charges: 3,594.93 USD

Payments Received

Date Posted	Item Description	Amount	
01/16/2008	Payment - Thank You	-350.00	USD
01/16/2008	Payment by Check	-1,000.00	
01/16/2008	Payment by Cash	-500.00	

Total Payments: -1,850.00 USD

Self Service Pending Payments

Reference Number	Card Number's Last Four Digits	Amount	
		0.00	

Total Pending Payments: 0.00 USD

Financial Aid

Date Posted	Item Description	Amount	
		0.00	

Total Financial Aid: 0.00 USD

Anticipated Aid

Item Description	Anticipated Aid	
	0.00	

Total Anticipated Aid: 0.00 USD

Admissions Deposit Due

Short Description	Description	Due Amount	
		0.00	

Total Admissions Deposit: 0.00 USD

Refunds

Status	Long Name	Item Amount	

Total Refunds: 0.00 USD

Return

6. View the **Anticipated Aid**.

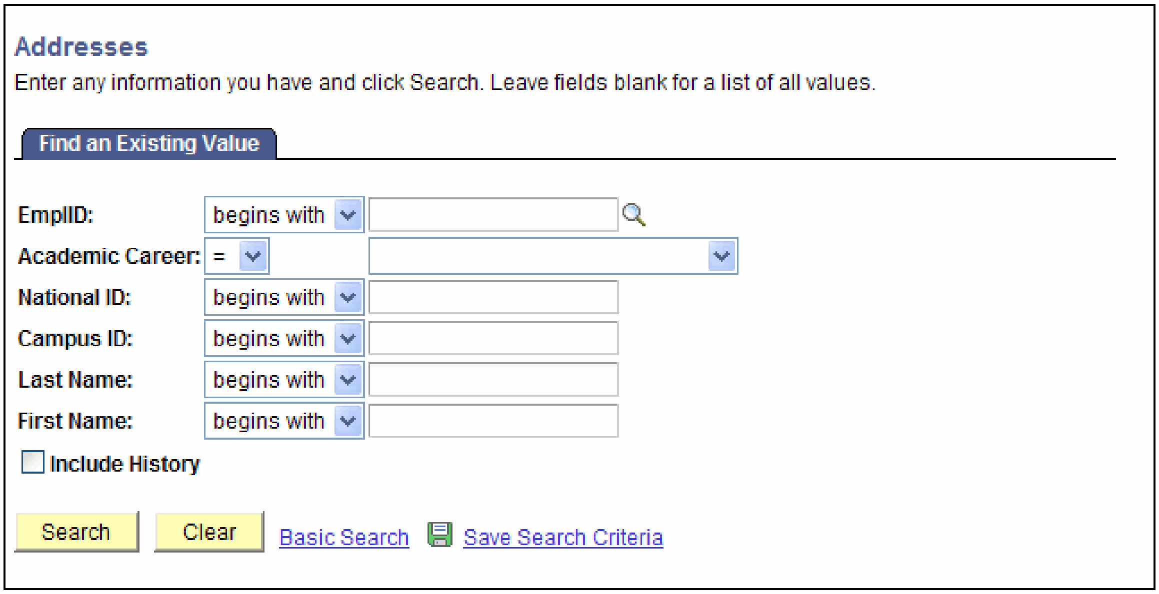
Bio/Demo Data

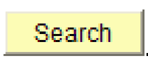
Biographic and demographic data stored in the SIS system is located in the Bio/Demo Data component.

The Bio/Demo Data component contains information on addresses.

NOTE:	Your access to these navigation paths will depend on your individual security.

Navigation: **Campus Community > Personal Information Student > Biographical (Student) > Addresses/Phones > Addresses**



1. Enter the student's **ID** (or **Last** and **First Name**).
2. Click 

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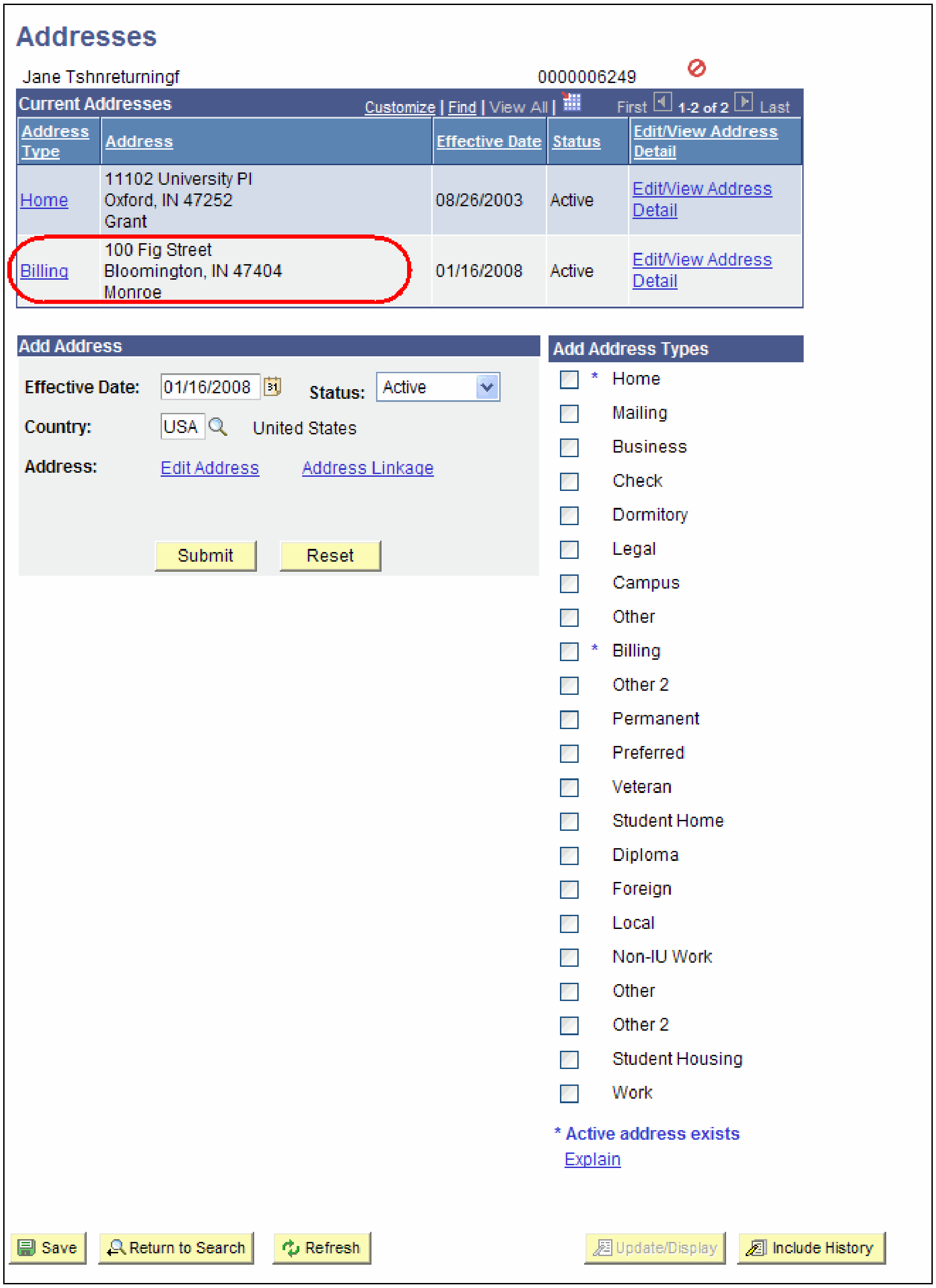
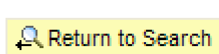
3. Select the student in the **Search results** if necessary. The *Addresses* page is displayed.



1. View the **Name** and **ID** of the student.
2. View the address information.
3. Click  to search for another student.

<u>Try It</u> - Complete Bio/Demo Data exercise 1 in the workbook.

Service Indicators

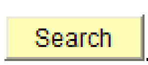
Most pages that display a student's information will display any appropriate Service Indicator Icons. For example, the *Customer Accounts* page shows them near the top of the page. Remember, there are several navigational paths where you can view a Service Indicator.

Service Indicators are pieces of information that are attached to a student's record. They can be attached to the student's record either manually or through certain automated processes (for example, the credit history or enrollment cancellation processes). Service Indicators are used to provide services (positive) or restrict services (negative). They can also be informational in nature, and not have any functionality associated with them. The Service Indicator icons appear throughout the Student Administration system pages. Each icon can represent one or several Service Indicators.

Each Service Indicator must have a Reason attached to it. Reasons are used to define "why" a Service Indicator was placed. Also, each Service Indicator can have one or many Impacts. The Impacts specify which services are provided or restricted by that Service Indicator. In general, Indiana University will be using Negative Service Indicators with an impact, but Positive Service Indicators will be more for informational purposes only, with no associated Impact.

Viewing Service Indicators using the Account Summary Page

Navigation: **Student Financials > View Account Summary**

1. Enter the **Business Unit**.
2. Enter the student's **ID** (or **Last** and **First Name**).
3. Click 

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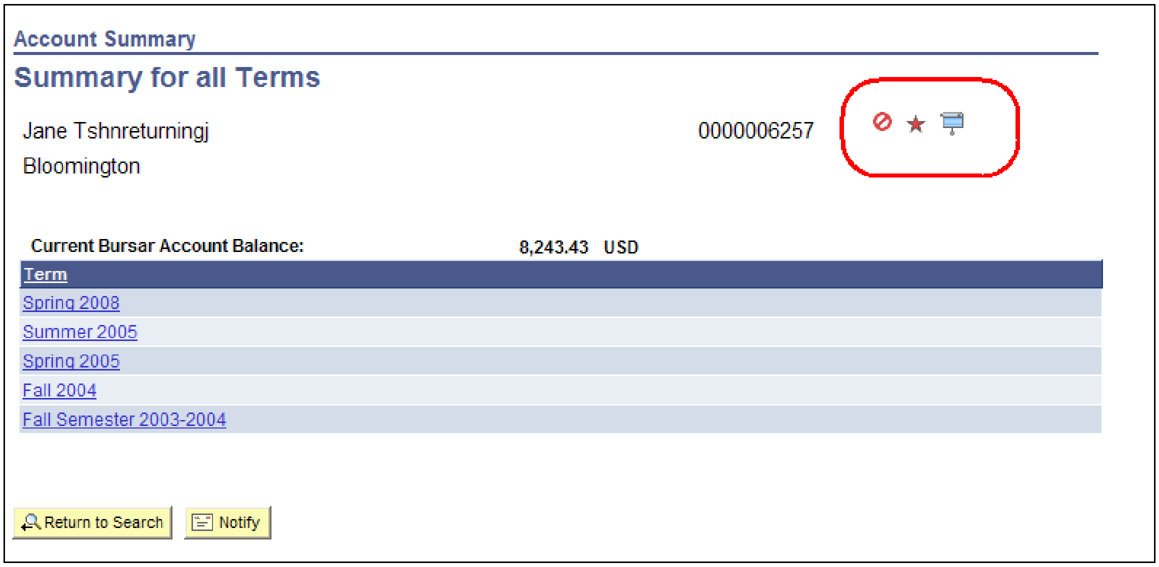
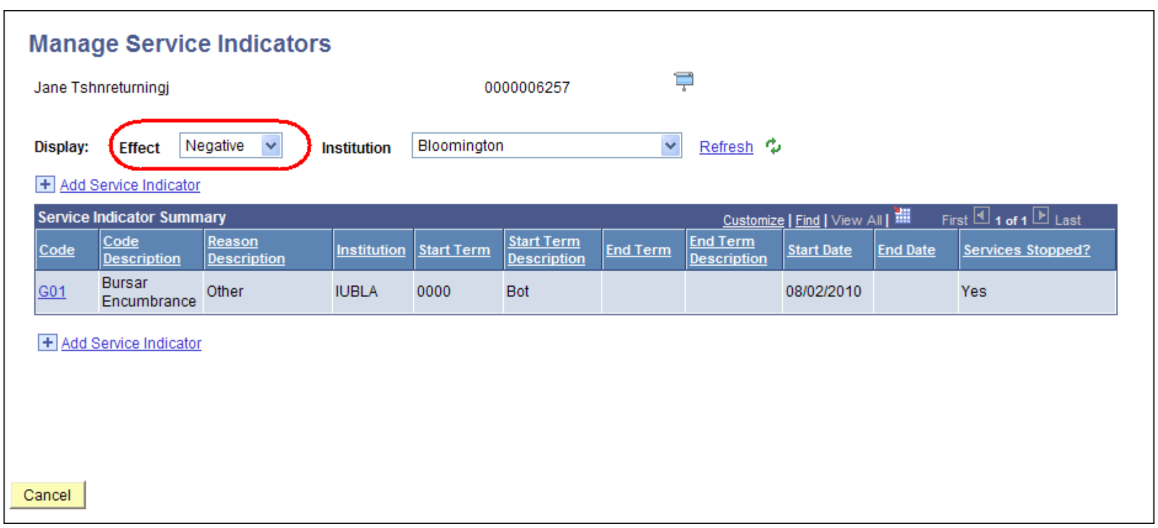


You can quickly learn more about the Service Indicator by clicking the icon.

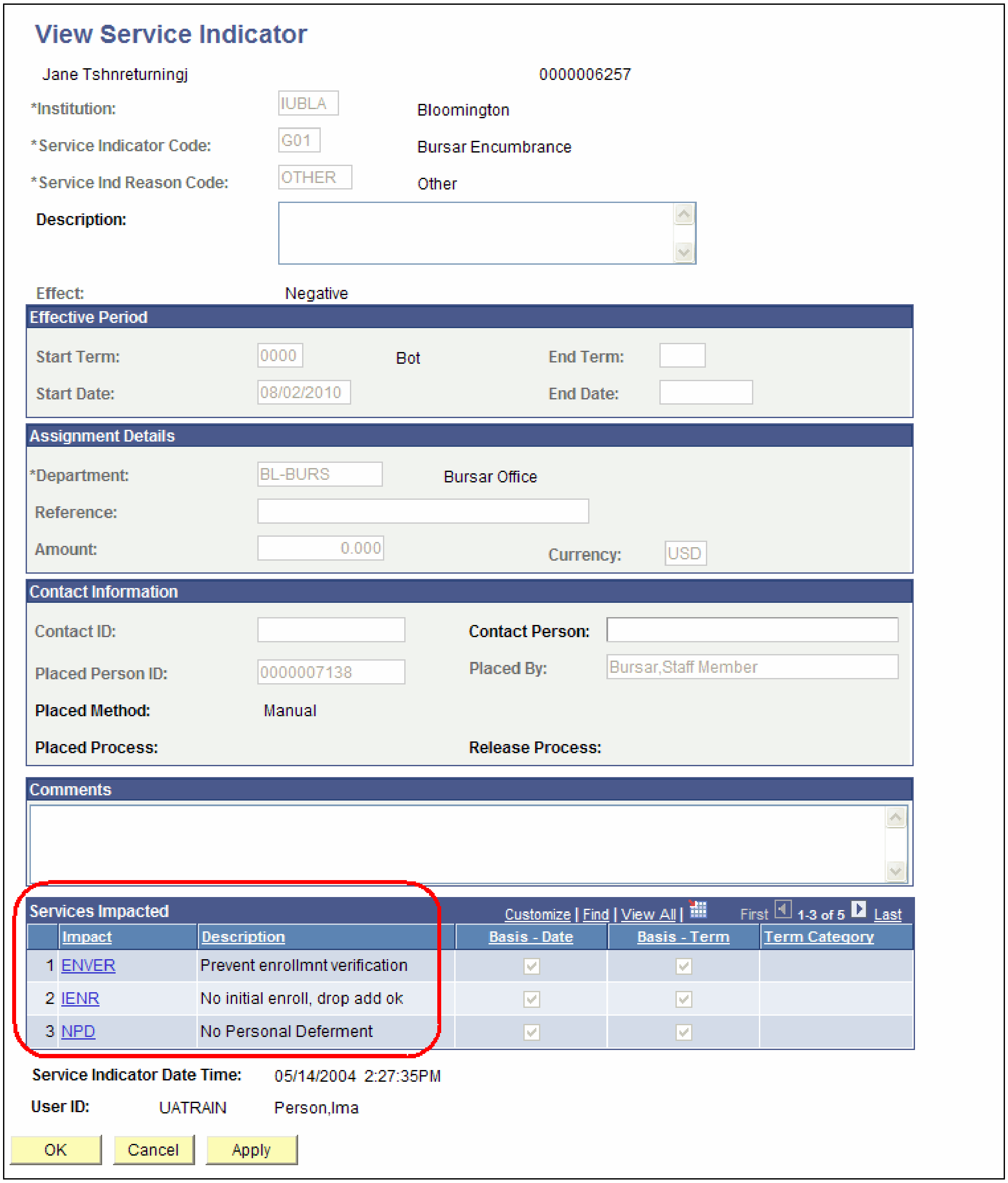
4. Click the positive Service Indicator icon ( ) or the negative Service Indicator icon ( ) to move to the *Manage Service Indicators* page.

   - If you click on the positive service indicator icon, only the positive service indicators will be displayed.
   - If you click on the negative service indicator icon, only the negative service indicators will be displayed.
   - You can choose to view all of the Service Indicators, only the positive or only the negative Service Indicators. To change your selection, select **All**, **Positive** or **Negative** from the **Effect** drop down menu and click Refresh. The **Effect** field is a filter. When you change it and click Refresh, the grid will change based on your filter criteria.



5. You can also view only Service Indicators for your campus. Select your campus in the **Institution** drop down menu and click Refresh.

6. To display further information about any Service Indicator, positive or negative, click the link in the **Code** column. The View *Service Indicator* page displays the full details about the Service Indicator(s). If you have "Display Only" access, the fields will not be enabled.



7. This page shows the details of the Service Indicator, including when it was placed and the **User ID** of the person who placed the indicator, as well as any services that may be impacted. From this page, you may return to the previous page by clicking Cancel.

Try It - Complete Service Indicators exercise 1 in the workbook.

Identifying FERPA Restrictions

FERPA restrictions are generally identified during an inquire process. It is CRUCIAL to ALWAYS look first for the privacy shade icon when opening a student's record.

The **Family Educational Rights & Privacy Act** (**FERPA**) is a federal law designed to protect the privacy of a student's education record. The law applies to all schools which receive funds under an applicable U.S. Education Department program. FERPA applies only to student records. It carries no authority over employee records.

Under FERPA, institutions may designate certain limited student information as directory/public information. Institutions in compliance with FERPA provide that, with the exception of directory/public information, all student records are confidential and available only to the student.

Indiana University (IU) modeled a policy, the "IU Release of Student Information Policy", from FERPA. This IU policy defines "directory/public information" at IU. This directory/public information is limited to the following:

- Name
- Address
- E-Mail Address
- Phone
- Major field of study
- Dates of attendance
- Admission or enrollment status
- Campus
- School, college or division
- Class standing
- Degrees and awards
- Activities
- Sports
- Athletic information

A privacy shade icon ( ) indicates that the student has designated certain information as non-releasable.

Callers requesting information about a student who has placed FERPA restrictions on their directory/public information should be referred to the Office of the Registrar.

If there is a directory exclusion preventing release of certain information to the public, the data is considered "confidential". However, University officials with a legitimate need still have access to the restricted information.

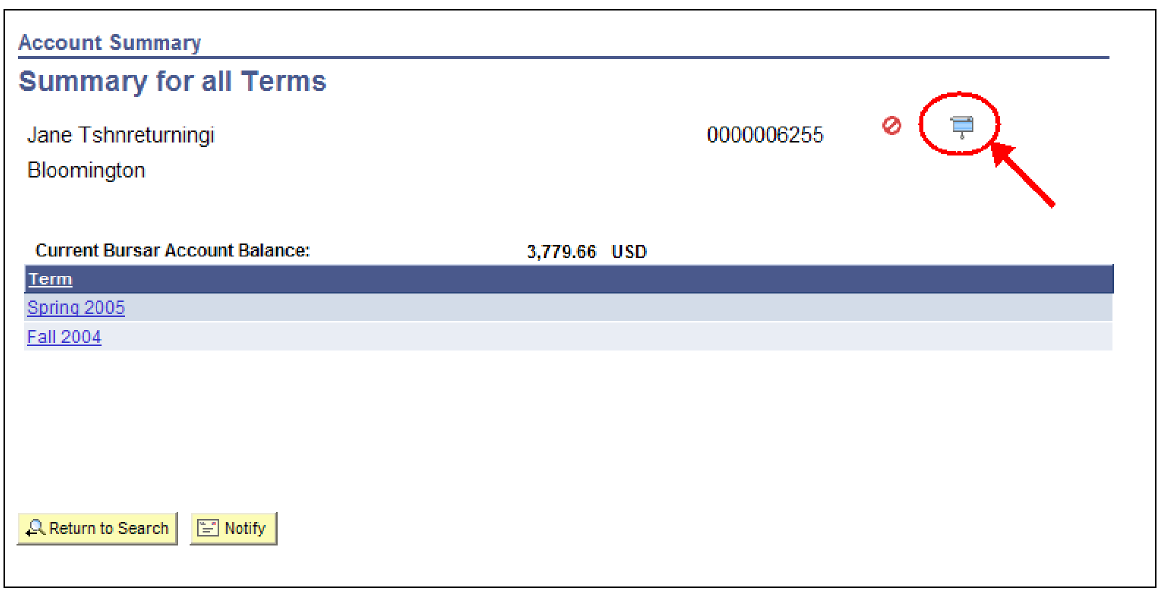
To rescind a restriction, the student must submit a written request to the Office of the Registrar asking that the restriction be removed.

If there is no privacy shade icon ( ) displayed on the record, there is no special permission required to release directory/public information.

NOTE:	Bursar information such as balances, refund amounts, status, etc. should **NEVER** be released to third parties. If you receive questions from parties other than the student about this type of information please refer the individual to the Bursar's Office.

Navigation: **Student Financials > View Account Summary**

1. Enter the **Business Unit**.
2. Enter the student's **ID** (or **Last** and **First Name**).
3. Click Search.



Notice the privacy shade icon ( ) in the upper right quarter of the page. This indicates that FERPA restrictions have been applied to this record. This indicator will be visible on all student-specific pages. If this icon appears on the student's account, refer any callers to the Office of the Registrar.

NOTE:	Bursar information such as balances, refund amounts, status, etc. should **NEVER** be released to third parties. If you receive questions from parties other than the student about this type of information please refer the individual to the Bursar's Office.

Getting Help

The SIS Online Help website is available at:
http://ses.indiana.edu/campusServices/sisTraining/SIS9.0_onlineHelp/

You may submit a request for assistance to the SIS Help Desk by completing the web form at:
http://ses.indiana.edu/campusServices/sisHelpDesk/

If you are accessing the SIS application via the OneStart portal, you may contact the SIS Help Desk by clicking on the Problem Report link. This link is located in the **SIS Launch** box on the *Administrative Systems* page or in the **SIS Support** box on the *SIS* page.

If you need to request changes to your security access or add new users, please work directly with your campus Data Manager. A list of Data Managers may be found at:
http://datamgmt.iu.edu/CDS/managers.html. This link is also available in the **SIS Support** box on the *SIS* page in OneStart.