



**INDIANA UNIVERSITY**

**SIS Course Workbook**

**Student Financials  
Customer Services for Departmental Staff**

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## Account Summary

### Exercise #1 Objective

Use the information listed below to:

- View student's account summary.

### Business Scenario

You receive a phone call from a new student at the Bloomington campus who has just received her bill. The student is confused about how much they really owe because they don't understand how to read the bill.

Student ID	0000006263
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### Questions

1. What is the student's outstanding balance? \_\_\_\_\_
2. Have any payments been applied to the student's account for the Spring 2008? If so, what is the total amount of the payments? \_\_\_\_\_
3. What is the total amount of charges applied to the account for the Spring 2008? \_\_\_\_\_

## Exercise #2 Objective

Use the information listed below to:

- View detailed information about a student's account summary for a specific term.

## Business Scenario

You receive a call from a student at the Bloomington campus asking what their current balance is. You give the student the current outstanding balance. The student would like more information about the charges. Use the *Account Summary – Account Detail for Term* page to review detailed payment information.

Student ID	0000006247
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## Questions

1. What is the student's current outstanding balance for the Spring 2008? \_\_\_\_\_
2. How many payments have been received from the student for the Spring 2008? \_\_\_\_\_
3. What is the specific charge amount for the Technology Fee? \_\_\_\_\_

## IU Global Account View

### Exercise #1 Objective

Use the information listed below to:

- View overall activity on a student's account.

### Business Scenario

You receive a phone call from a student who has taken classes at multiple campuses. She is currently enrolled at your campus and needs to know what her outstanding balance is.

Student ID	0000006249
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### Questions

1. What is this student's outstanding balance for IUPUI? \_\_\_\_\_
2. What is this student's outstanding balance for IU Bloomington? \_\_\_\_\_

## Bio/Demo Data

### Exercise #1 Objective

Use the information listed below to:

- View a student's address information.

### Business Scenario

You need to confirm a student's billing address. Use the *Bio/Demo Data – Addresses* page to review the student's address information.

Student ID	0000006077
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### Questions

1. What is the student's billing address? \_\_\_\_\_
2. What is the **Effective Date** for the student's billing address? \_\_\_\_\_

## Service Indicators

### Exercise #1 Objective

Use the information listed below to:

- Locate and view a Service Indicator on a student's record.

### Business Scenario

Jane Tshnreturningf from the Bloomington campus has a service indicator attached to her record. View the *Account Summary* page to gain information regarding which service indicator has been placed on her record.

Student ID	0000006249
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### Questions

1. What did you do on the *Account Summary* page to view the Service Indicator? \_\_\_\_\_  
\_\_\_\_\_
2. Is this a Multi-institutional Service Indicator? How can you tell whether it is or is not? \_\_\_\_\_  
\_\_\_\_\_
3. Which campus placed the Service Indicator on this student's record? (Hint: Look at the Reason Description to get the correct answer.) \_\_\_\_\_
4. Are services impacted due to this Service Indicator? If so, what services are impacted for the IUPUI campus? \_\_\_\_\_

## Answers to Questions:

### Account Summary

#### Exercise Objective #1:

**Question 1.:** What is the student's outstanding balance?

**Answer:** \$1,574.93.

**Question 2.:** Have any payments been applied to the student's account for the Spring 2008? If so, what is the total amount of the payments?

**Answer:** Yes. \$1850.00.

**Question 3.:** What is the total amount of charges applied to the account for the Spring 2008?

**Answer:** \$3,594.93

#### Exercise Objective #2:

**Question 1.:** What is the student's current outstanding balance for the Spring 2008?

**Answer:** \$3,594.93.

**Question 2.:** How many payments have been received from the student for the Spring 2008?

**Answer:** None.

**Question 3.:** What is the specific charge amount for the Technology Fee?

**Answer:** \$200.00.

### IU Global Account View

**Question 1.:** What is this student's outstanding balance for IUPUI?

**Answer:** \$993.21

**Question 2.:** What is this student's outstanding balance for IU Bloomington?

**Answer:** \$2801.13

### Bio/Demo Data

**Question 1.:** What is the student's billing address?

**Answer.:** 11015 University Pl, Oxford, IN 47252.

**Question 2.:** What is the **Effective Date** for the student's billing address?

**Answer.:** 08/26/2003.

### Service Indicators

**Question 1.:** What did you do on the *Account Summary* page to view the Service Indicator?

**Answer:** Clicked on the Service Indicator icon.

**Question 2.:** Is this a Multi-institutional Service Indicator? How can you tell whether it is or is not?

**Answer:** Yes. The reason codes say Multi Inst.

**Question 3.:** Which campus placed this Service Indicator on this student's record?

**Answer:** The Bloomington campus.

**Question 4.:** Are services impacted due to this Service Indicator? If so, what services are impacted for the IUPUI campus?

**Answer:** Yes. No Checks Accepted (CHECK).