View Customer Accounts

Business Process Guide

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View Customer Accounts Overview

Student Accounts is responsible for providing timely and accurate information to students regarding their financial obligations and account activity at Central Washington University. This information can be found on-line in MyCWU. Navigation: Main Menu>Campus Solutions>Student Financials. There are three main areas here: View Account Summary, View Customer Accounts, and View Corporate Accounts. To view student/customer accounts the “View Customer Accounts” has the most information. Once you select it type in the student/customer ID#. There are several places and in several different formats to view account information. (Account Details, Detail Trans, Item Summary, Items by Term, Items by Date, Due Charges, and Payment Plans.)

The financial information includes charges for tuition and fees, housing and dining, university bookstore, university day care, parking permits and fines, Library services, student insurance, interest on past due charges, Tent-N- Tube, etc. It also includes payments and credits made by students, their families, outside agencies (guaranteed sources), financial aid and other sources.

The following gives instructions on how to access a student’s financial information using the Customer Accounts view. Corporate/Organizational accounts cannot be viewed through the paths outlined in this document.

Before You Begin

Prerequisites and Assumptions

Before you can successfully inquire about a person’s Customer Accounts, it is assumed that each of the following conditions has been met:

- User is familiar with MyCWU navigation

Other Materials Needed

To successfully inquire about a person’s Customer Accounts, you may need to refer to the following documents:

- Introduction to PeopleSoft Reference Guide
1.0 View Customer Accounts

This process is used when a person has a question regarding the financial activity for a specific student. The information on these screens can be difficult to understand and something can easily be missed, please do not advise students about what they owe; have them contact Student Accounts. 509-963-3546

1.1 Customer Accounts Page

Please note – When using the SF module, searches will only display those students who have some type of financial activity on their account. The student may exist in MyCWU, but he/she will only display when using the “search” functions on these pages if he/she has had a charge or payment posted to his/her account.

Navigation: Main Menu > Campus Solutions > Student Financials > View Customer Accounts

To access a student’s Customer Accounts page, follow the navigation path listed above.

Steps for Viewing the Customer Accounts Page:

1. On the search page for Customer Accounts, Business Unit is a required field and should default in with CWUID.
2. Enter the student’s CWU ID number into the ID field.
   Or, if the ID of the individual is not known, you may search using the student’s Last Name (or a portion of it). This search will display all students whose last name meets the criteria you entered into the search field.
   Another option is to carry out a search using both the Last Name and First Name fields (may
enter just a portion of each). If you wish to use the **First Name** field to search, you must also enter at least a portion of the last name into the **Last Name** field.

3. Click the **Search** button.

4. To clear the information you entered into the fields on this page, click the **Clear** button.

If more than one **Search Result** appears at the bottom of the page, click on the link for the student you wish to view. You may need to refer to **Date of Birth**, etc., to make sure you are choosing the correct student.

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**Customer Accounts**

Business Unit: CWJID  
Wildcat, Wellington  
Total: 1.00  
ID: 22745641  
Anticipated Aid: 0.00

<table>
<thead>
<tr>
<th>Account Type</th>
<th>Account Number</th>
<th>Balance</th>
<th>Open Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>INT on Act</td>
<td>000000000001</td>
<td>0.00 USD</td>
<td>12/12/2014</td>
<td>Active</td>
</tr>
<tr>
<td>DEPOSITS</td>
<td>DEP001</td>
<td>0.00</td>
<td>07/12/2016</td>
<td>Active</td>
</tr>
<tr>
<td>PPlan Acct</td>
<td>PAYPLAN001</td>
<td>0.00</td>
<td>01/12/2015</td>
<td>Active</td>
</tr>
<tr>
<td>HOUSDINING</td>
<td>HOU001</td>
<td>0.00</td>
<td>07/12/2016</td>
<td>Active</td>
</tr>
<tr>
<td>TUTIONFEE</td>
<td>TUI001</td>
<td>0.00</td>
<td>07/12/2016</td>
<td>Active</td>
</tr>
<tr>
<td>OTHERMISC</td>
<td>OTH001</td>
<td>1.00</td>
<td>04/22/2016</td>
<td>Active</td>
</tr>
<tr>
<td>TUTIONFEE</td>
<td>TUI001</td>
<td>0.00</td>
<td>04/22/2016</td>
<td>Active</td>
</tr>
</tbody>
</table>

Go to: Detail Trans Item Summary Items by Term Items by Date Due Charges Payment Plans

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**Tips for Viewing the Customer Accounts Page:**

1. It may be necessary to click on the **View All** link in the header of the **Customer Accounts** page to view additional rows of information.

2. This first page shows a summary of **Customer Accounts**, organized first by **Term** (in descending chronological order) and then by **Account Type** (in ascending alphabetical order).

3. The recommended links to view are: Items by Date, Due Charges, and Payment Plans.

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**All Deposit activity will appear first because deposits are not summarized by term.**  
See sample below.
CWU currently uses four main Account Types:

TUITIONFEE – tuition, mandatory fees, course fees, Continuing Education classes, etc.

HOUSING – all Residence Hall and Apartment rents, fees, fines, meal plans, Connection Card, etc.

OTHERMISC – all other University charges including bookstore, daycare, parking permits, parking fines, library fines, student insurance, etc.

DEPOSITS – all university deposits including Residence Hall, apartments, wait list, music lockers, etc.

Other less common Account Types may include payment plan, write-offs, third party contracts, and others to be developed in the future. Also, if a student owes a balance that is 30 days past due; they will have interest charged to their account. See sample below.

4. To view the student’s Academic Information, click on the Academic Information link above the header on this page. Refer to the directions in section 1.1.1 below.

5. If any negative service indicator, positive service indicator, or FERPA icons appear at the top of the page, you may click on the icon for further information.

6. To view more details about a particular line item, click on the Account Details link to the right of the item. Refer to the directions in section 1.1.2 below.

7. The Customer Accounts main page also has several different views available for looking at the information posted to a student’s account – Detail Trans, Item Summary, Items by Term, Items by Date, Due Charges, Payment Plans, and View Anticipated Aid (which will only display if the student has Anticipated Aid).

8. To view all the details posted to the student’s account, click on the Detail Trans link. Refer to
the directions in section 1.1.3 below.

9. To view the student’s activity summarized by Item Type, click on the Item Summary link. Refer to the directions in section 1.1.4 below.

10. To view the student’s activity organized by Term, click on the Items by Term link. Refer to the directions in section 1.1.5 below.

11. To view the student’s activity organized by Date, click on the Items by Date link. Refer to the directions in section 1.1.6 below.

12. To view the student’s activity organized by Due Date, click on the Due Charges link. Refer to the directions in section 1.1.7 below.

13. The student’s anticipated financial aid will show up on the Customer Accounts page upper middle of the screen as Anticipated Aid. This will only display if the student has Anticipated Aid.

14. To locate another student’s Account information, click the button to return to the search page for Customer Accounts. Return to the directions at the beginning of section 1.1 above.

1.1.1 Academic Information Page for Customer Accounts

The Academic Information page provides a summary of the student’s Career Term Data.

If you have not already accessed the View Customer Accounts page, follow the directions in section 1.1 above to do so. Academic Information is a link at the top of the page next to the negative service indicator.
Tips for Viewing the Academic Information Page:

1. The student’s **Career Term Data** displays under the bottom title bar on the **Academic Information** page.

2. It may be necessary to click on the **View All** link in the **Career Term Data** title bar to view additional rows of information.

3. For information about the student’s major, minor or specialization, click on the **Academic Plan** link in the appropriate row. When finished with the **Academic Plan** page, click on the **Return** link to return to the **Academic Information** page.

4. For enrollment information, click on the **Enrollment** link in the appropriate row. For additional information about a particular class listed on the **Enrollment Summary** page, click on the **Class Info** link. When finished with the **Class Meeting/Instructor** page, click on the **Return** link to return to the **Enrollment Summary** page. When finished with the **Enrollment Summary** page, click on the **Return** link to return to the **Academic Information** page.

5. On the **Academic Information** page, click on the **Return** link to return to the **Customer Accounts** page.

### 1.1.2 Account Details Page

The **Account Details** page displays all transactions for the **Account Type** and **Term** indicated. This includes charges and payments that have applied toward the charge.

If you have not already accessed the **Account Details** page, follow the directions in section **1.1** above to do so. **Account Details** is located to the right of each **Account Type**.
Tips for Viewing the Account Details Page:

1. It may be necessary to click on the View All link in the header of the Account Details page to ensure that you are viewing all rows of data.

2. Above the header of the Account Details page, you will see the student’s Account Balance listed for the Account Type and Term.

3. Under the Account Balance, you will see the Debits, Credits, credits Applied and credits Unapplied for the Account Type and Term you selected.

4. Under the header, you will see two rows of information for each item listed on the Account Details page. The Balance listed under the item’s first row will indicate the amount of the charge or credit. The amount listed under the item’s second row will indicate whether there is still a Balance on the item or not. In the example above, the 47.50 listed in the CE CornerStone Tuition Fee first row indicates a charge of $47.50, and the 0.00 in the second row indicates that there is no Balance left on that charge (In other words, it has been paid.). Looking at the Payment General listed above, which shows -250.00 in its first row and 0.00 in its second row, a person can gather that the student made a $250.00 payment and that all of that payment has been applied toward one or more charges so that there is now a 0.00 Balance left on that charge.

5. To view more detailed information about a particular payment on this page, click on the Item Details link next to the payment. This only shows up if there was a payment. It usually has a Receipt Details link next to it. See Tips for Viewing Details about Payments in section 1.1.2.1 below.

6. To view more detailed information about a particular charge on this page, click on the Item Details link for the charge. See Tips for Viewing Details about Charges in section 1.1.2.1 below.

7. To view more detailed information regarding the receipt of a particular payment on this page, click on the Receipt Details link for the payment. See section 1.1.2.2 below.

8. To return to the Customer Accounts page from the Account Details page, click on the Return link. Return to the directions in section 1.1 above.

1.1.2.1 Item Details Page

The Item Details page displays more detailed information about a particular item listed on the Account Details page.

If you have not already accessed the Item Details page, follow the directions in section 1.1.2 above to do so.

1. If you clicked on the link to view details about a Payment, see Tips for Viewing Details About Payments below.

2. If you clicked on the link to view details about a Charge, see Tips for Viewing Details About Charges below.
Tips for Viewing Details About Payments:

1. On the Payment Line Details page, it may be necessary to click on the View All link in the Account Split for Payment title bar, the Details title bar or the bottom header that shows charges the payment paid to ensure that you are viewing all rows of data. The user did click this link in the bottom header in the screen shot above because only two of the four lines were displaying. Now all four display.

2. The Payment Line Details page details information about the charges that were paid by a particular payment. Only payment information relating to the Account Type you chose will show up under the bottom header. Keep in mind, however, that it is possible for a payment to go toward charges in more than one Account Type area. In the screen shot above, the Account Type is TUITIONFEE. In this case, the entire $250.00 payment did go toward only charges in the TUITIONFEE Account Type area (2.50 plus 10.00 plus 47.50 plus 190.00).

3. Click on the Return link to return to the Account Details page. Return to the directions in section 1.1.2 above.
Tips for Viewing Details About Charges:

1. It may be necessary to click on the View All link in the Details title bar or the header under Payments paying this Charge to ensure that you are viewing all rows of data.

2. The Item Details page for charges displays information regarding the charge including the Posted date, Effective date, Billed date, Due date, Amount, etc., under the Details title bar.

3. If a payment has been made, that payment information will be displayed below the header under Payments paying this Charge. In the screen shot above, the student made a General Payment, which paid the entire $190.00 charge for this item.

4. Click on the Return link to return to the Account Details page. Return to the directions in section 1.1.2 above.

1.1.2.2 Receipt Details Page

The Receipt Details page displays more detailed information about a particular payment.

If you have not already accessed the Student Receipt Details page, follow the directions in section 1.1.2 above to do so.
Tips for Viewing the Student Receipt Details Page:

1. The **Student Receipt Details** page shows information such as the **Receipt Status**, **Receipt Nbr**, date received (**Business Date**), the **Cashier** who posted the payment, amount (**Total Amount**), tender (**Tender Key**), etc.

2. To get specific information about the tender used for the payment (i.e. **Check Nbr**, **Bank Account Holder Name**, **Credit Card**, etc.), click on the **Tender Details** link. When finished viewing the Tender details, click on the **Return** link to return to the **Student Receipt Details** page. If the payment was a cash payment, there will be no **Tender Details** link.

3. On the **Student Receipt Details** page, click on the **Return** link to return to the **Account Details** page. Return to the directions in section 1.1.2 above.

### 1.1.3  **Detail Trans Page**

The **Detail Trans** page provides a listing of all transactions posted to the student’s account.

**Navigation:**  
Main Menu > Campus Solutions > Student Financials > View Customer Accounts > Detail Trans

If you have not already accessed the **Detail Trans** page, follow the directions in section 1.1 above.
Tips for Viewing the Detail Trans Page:

1. On the Detail Trans page, it may be necessary to click on the View All link or the left and right arrow keys in the header to view additional rows of information.

2. The Detail Trans page is organized in alphabetical order by Account Nbr, which is similar to Account Type (currently DEP001, HOU001, OTH001, and TUI001).

3. When finished with the Detail Trans page, click on the Return link to return to the Customer Accounts page. Return to the directions in section 1.1 above.

1.1.4 Item Summary Page

The Item Summary page provides a listing of all transactions posted to the student’s account. This page also shows the balance on each of the transactions (not a running balance) for the student.

Navigation: Main Menu > Campus Solutions > Student Financials > View Customer Accounts > Item Summary

If you have not already accessed the Item Summary page, follow the directions in section 1.1 above to do so.
Tips for Viewing the Item Summary Page:

1. On the Item Summary page, it may be necessary to click on the View All link or the left and right arrow keys in the header to view additional rows of information.

2. Under the Item Description tab, the Item Summary page is organized by Item Type. Each row of information indicates a different transaction, or item.

3. This page shows information such as the Item Type, Term associated with the item, Account Type (Account Number), Account Term, Amount (Item Amt), and Balance due for each item. In the screen shot above, the first row of information indicates an “Application Fee…” charge of 50.00 (under the Item Amt column). This charge has been paid, as evidenced by the 0.00 Balance.

4. Clicking on the Item Due Date tab will reveal all items and their due dates, if there is a due date (see screen shot below).

5. Clicking on the Refund Details tab will also reveal if an item has been refunded. Note: To see all REFUNDS go to - Campus Solutions/Student Financials/Refunds.

6. For additional details about a particular charge listed under the Item Due Date tab, click on the appropriate Item Details link to access the Item Line View By Due Date page. The Item Line View By Due Date page shows the Item Type description, Item Nbr (the transaction number, not the Item Type Number), the Acct Nbr, pertinent dates, Status, and Amount. When finished with the Item Line View By Due Date page, click on the Return link to return to the Item Summary page.

7. When finished with the Item Summary page, click on the Return link to return to the Customer Accounts page. Return to the directions in section 1.1 above.

1.1.5 Items by Term Page

The Items by Term page provides a summary of the student’s account activity organized by Term.

Navigation: Main Menu > Campus Solutions > Student Financials > View Customer Accounts > Items by Term
If you have not already accessed the **Items by Term** page, follow the directions in section **1.1** above to do so.

### Tips for Viewing the Items by Term Page:

1. On the **Items by Term** page, it may be necessary to click on the **View All** link or the left and right arrow keys in one or more of the headers to view additional rows of information.

2. Information available under the top header of the **Items by Term** page includes the **Total Credits**, **Total Debits**, anticipated aid (**Antic Aid**) – please see note below, **Total due** and total including anticipated aid (**Total Incl Antic Aid**) for a specific **Term**.

3. The **Items by Term** page also shows the details for all items posted to a specific term (under the second header). It will also show Financial Aid that has been adjusted. If it has been reduced, it will show as a debit rather than a credit. Easy to see if items are sorted in date order.

   **Please note** - Because the information on this page is by **Term** only, the account balances may be misleading. For instance, if a charge is posted in the Spring, but the payment is posted in the Fall, this page may show a large balance due in the Spring and a large credit in the Fall.

4. When finished with the **Items by Term** page, click on the **Return** link to return to the **Customer Accounts** page. Return to the directions in section **1.1** above.

### 1.1.6 **Items by Date Page**

The **Items by Date** page provides a summary of the student’s account activity organized by **Date**.
If you have not already accessed the Items by Date page, follow the directions in section 1.1 above to do so.

Tips for Viewing the Items by Date Page:

1. Under the bottom header on the Items by Date page, you will find the Date Posted, effective date (Item Effective Date), Billing Date, Due Date, Item Type, Term, and Amount of each item.

2. This page can be sorted by Posted Date, Effective Date, Bill Date or Due Date; however, it displays in reverse order with the most current date listed first. If you do choose one of these, remember to click the Search button.

3. When finished with the Items by Date page, click on the Return link to return to the Customer Accounts page. Return to the directions in section 1.1 above.

1.1.7 Due Charges Page

The Due Charges page summarizes the student’s account activity by Due Date.

If you have not already accessed the Due Charges page, follow the directions in section 1.1 above.
Tips for Viewing the Due Charges Page:

1. On the Due Charges page, it may be necessary to click on the View All link or the left and right arrow keys in one or both of the title bars to view additional rows of information.

2. The top half of the page summarizes the amount due by Due Date. It includes the Due Date, Due Amount, and Total Due (which is a running total).

3. The bottom half of the page shows the account broken down by Item Type. It includes the Item Type description, Item Term, Account Nbr, Account Term, Due Date, Due Amt, and Total Due (which is a running total).

4. When finished with the Due Charges page, click on the Return link to return to the Customer Accounts page. Return to the directions in section 1.1 above.