

Understanding PeopleSoft Billing and Financial Aid

The statement of account is a snapshot in time and may not reflect the most recent activity on the student's account. The best place to see current charges, credits, and the amount due is through the PeopleSoft section of the student portal.

- Log into the [Student Portal](#)
- Once you have logged in, click on the PeopleSoft icon located on the left hand side that will bring you to your Student Center

Student Center

The screenshot displays the Student Center interface. At the top, there are navigation tabs: student center, general info, academics, transfer credit, admissions, finances, and fin. Below these is the 'Student Center' header. The 'Academics' section is expanded, showing 'My Class Schedule' and a dropdown menu for 'other academic...'. A table titled 'This Week's Schedule' lists classes with their IDs and times. Below this, the 'Finances' section is expanded, showing 'My Account' and 'Financial Aid' links. A red box highlights the 'Account Summary' section, which shows 'You owe 9,263.00.' with a breakdown of 'Due Now' (0.00) and 'Future Due' (9,263.00). A large red arrow points from the 'Account Summary' box towards the right.

This Week's Schedule		
	Class	Schedule
	ECO 100-2 LEC (1368)	TuTh 9:30AM - 10:45AM Classroom Building (Room 101)
	EGL 100-1 LEC (1002)	MoWeFr 11:00AM - 11:50AM Lab Building (Room 114)
	GMA 105-1 LEC (1188)	TuTh 8:00AM - 9:15AM ABS Building (Room 101)
	LAN 110-3 LEC (1305)	TuTh 2:00PM - 3:15PM Classroom Building (Room 101)
	LIB 100-2 LAB (1100)	MoWe 10:00AM - 10:50AM Lab Building (Room 114)
	PE 100-1 ACT (1253)	Room: TBA
	PE 160-3 ACT (1065)	We 12:30PM - 2:20PM Technology Center (Room 108) Fr 12:30PM - 2:20PM Boathouse
	PE 235-1 ACT (1066)	Room: TBA

Account Summary (See * link below)

You owe 9,263.00.

- Due Now 0.00
- Future Due 9,263.00

Currency used is US Dollar.

TIP

The finances section of the student center shows the charges posted to the account based on your current registration. Anticipated aid is not reflected; therefore what you actually owe may be less than what is initially shown on this page. Drill down further to see how much financial aid is anticipated to disburse to the account!

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Account Inquiry

TIP

Clicking on the Account Inquiry link allows you to view outstanding charges AND pending financial aid.

The screenshot shows the 'Finances' section of a PeopleSoft interface. Under 'My Account', the 'Account Inquiry' link is highlighted with a red arrow. To the right, the 'Account Summary' box shows 'You owe 11,028.00.' with a breakdown: 'Due Now' 0.00 and 'Future Due' 11,028.00. Below this, it states 'Currency used is US Dollar.' and provides a link for '*Important Student Fee Information'.

Account Summary

TIP

If your pending financial aid is **LARGER** than your outstanding charges and deposits, **you don't owe anything** and you may be due a refund after classes begin.

If your aid is less than your charges, you will need to pay the difference by the due date. If you change your registration, there may be additional charges due. Remember to check your account after all enrollment changes.

Account Summary

You owe 11,028.00. For the breakdown, access Charges Due

- Due Now 0.00
- Future Due 11,028.00

What I Owe			
Term	Outstanding Charges & Deposits	Pending Financial Aid	Total Due
Spring 2014	11,028.00	4,701.00	6,327.00
Total	11,028.00	4,701.00	6,327.00

Currency used is US Dollar.

Financial aid is awarded based in full time enrollment (12 or more units). Should you drop below full time by the add/drop deadline (January 17) some awards may be adjusted and you could end up with a balance.

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Using the Drop Down Menu

The drop down menu in PeopleSoft allows you to view all charges for all terms, or you can view by a specific term. To get there, navigate back to the Student Center.

The screenshot shows the 'My Account' section with links for 'Account Inquiry', 'Enroll In Direct', and 'Deposit'. Below that is the 'Financial Aid' section with a 'View Financial Aid' link. The 'Account Summary' box displays 'You owe 11,028.00.' with a breakdown: 'Due Now 0.00' and 'Future Due 11,028.00'. A red arrow points to the 'Account Activity' dropdown menu, which is open to show options: 'Account Activity', 'Charges Due', 'Pending Financial Aid', and 'other financial...'. A link for '*Important Student Fee Information' is also visible.

TIP
The drop down menu is in the finances section of the student portal.

Account Activity

The 'Account Activity' section features a 'View by' filter with a date range from '05/20/2013' to '11/20/2013' and a dropdown menu set to 'Spring 2014'. Below the filter is a table of transactions.

Posted Date	Item	Term	Charge	Payment	Refund
11/20/2013	Associated Student Body Fee	Spring 2014	105.00		
11/20/2013	Campus Document Fee	Spring 2014	15.00		
11/20/2013	Health Facilities Fee	Spring 2014	7.00		
		Spring			

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Viewing Pending Financial Aid

Again, using the drop down menu, you can see a breakdown of all pending financial aid that is expected to credit the account.

The screenshot shows the 'Finances' section of the PeopleSoft interface. Under 'My Account', there are links for 'Account Inquiry', 'Enroll In Direct', and 'Deposit'. Under 'Financial Aid', there is a link for 'View Financial Aid'. A dropdown menu is open for 'Pending Financial Aid', showing options: 'Account Activity', 'Charges Due', 'Pending Financial Aid', and 'other financial...'. A red arrow points to the 'Pending Financial Aid' option. To the right, the 'Account Summary' shows 'You owe 11,028.00.' with a breakdown: 'Due Now 0.00' and 'Future Due 11,028.00'. Below this, it says 'Currency used is US Dollar.' and '*Important Student Fee Information'.

TIP

Navigate back to the Student Center- Pending Financial Aid is an option in the drop-down box.

Just like in account activity, choose the term for which you want to review.

Pending Financial Aid

View By

Pending Financial Aid			Find View All	First 1-3 of 3 Last
Award	Term			
DL Stafford Subsidized	Spring 2014			1,732.00
DL Stafford Unsubsidized	Spring 2014			2,969.00
Total Pending Financial Aid for this view				4,701.00

First 1-3 of 3 Last

Currency used is US Dollar.