Student Financials (Admin. View Only)

Overview

This quick reference guide will cover how to navigate Student Financials profile as an Administrator.

Process

1. Search *Student: Student Name* from the Workday Home Page.
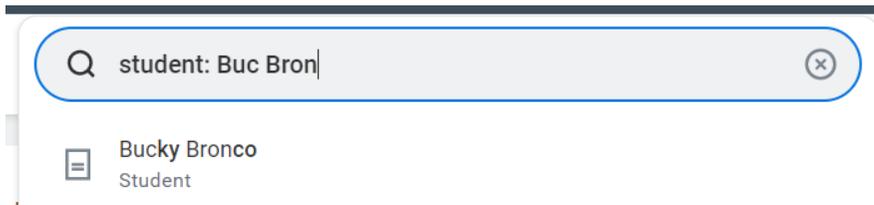
2. Select the **Student Financials** option on the left side of the profile.

3. The **Academic Period** tab
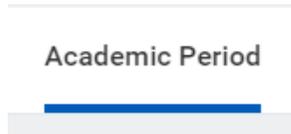
This tab displays the student's charges, applied payments, unapplied payments, pending refund amounts, settled refunds, total due, anticipated payments, and anticipated due by academic period.

Academic Period	Charges	Applied Payments	Unapplied Payments	Pending Refund Amount	Settled Refund Amount	Total Due	Anticipated Payments	Anticipated Due
Spring 2023 Quarter	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

This tab also provides the Total Account Balance, Due Now, Past Due, Current Due and Future Due amounts.

Total Account Balance	22,014.00	Past Due	22,014.00
Due Now	22,014.00	Current Due	0.00
		Future Due	0.00

4. The **Account Transactions** tab

This tab provides a running list of all charges, payments, and account adjustments in order of transaction date. Additionally, the running account balance and due dates are included.

Transactions 5 items

Academic Period	Transaction Date	Due Date	Transaction	Amount	Account Balance
Fall 2022 Quarter	12/08/2022		Tuition Undergraduate Adjustment	(11,060.00)	22,014.00
Fall 2022 Quarter	12/08/2022	12/08/2022	Tuition Insurance Plan	63.00	33,074.00
Fall 2022 Quarter	12/08/2022	01/21/2023	Student Health Insurance	2,773.00	33,011.00
Fall 2022 Quarter	12/08/2022	01/21/2023	University Enhancement Fee	218.00	30,238.00
Fall 2022 Quarter	12/08/2022	01/21/2023	Tuition Undergraduate	30,020.00	30,020.00

Student Financials (Admin. View Only)

This tab also provides the Total Account Balance, Due Now, Past Due, Current Due and Future Due amounts.

Total Account Balance	22,014.00	Past Due	22,014.00
Due Now	22,014.00	Current Due	0.00
		Future Due	0.00

5. The **Transaction Summary** - this tab is available to students too.
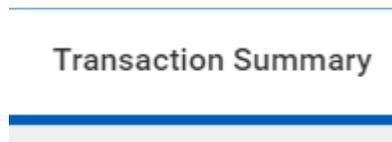
Transaction Summary

This tab also provides the Total Account Balance, Due Now, Past Due, Current Due and Future Due amounts.

Total Account Balance	22,014.00	Past Due	22,014.00
Due Now	22,014.00	Current Due	0.00
		Future Due	0.00

This tab provides a running list of all charges and payments in order of transaction date. Individual adjustment transactions are not visible to the student. Additionally, the running account balance and due dates are included.

4 items

Academic Period	Transaction Date	Due Date	Transaction	Amount	Account Balance
Fall 2022 Quarter	12/08/2022	12/08/2022	Tuition Insurance Plan	63.00	22,014.00
Fall 2022 Quarter	12/08/2022	01/21/2023	Student Health Insurance	2,773.00	21,951.00
Fall 2022 Quarter	12/08/2022	01/21/2023	University Enhancement Fee	218.00	19,178.00
Fall 2022 Quarter	12/08/2022	01/21/2023	Tuition Undergraduate	18,960.00	18,960.00

6. The **Outstanding Charges and Payments** tab

Outstanding Charges and Payments
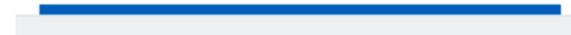
This tab also provides the Total Account Balance, Due Now, Past Due, Current Due and Future Due amounts.

Total Account Balance	22,014.00	Past Due	22,014.00
Due Now	22,014.00	Current Due	0.00
		Future Due	0.00

This tab provides a list of charges with outstanding balances (partial balances and full balances).

Student Financials (Admin. View Only)

Outstanding Charges 4 items					
Academic Period	Transaction Date	Due Date	Transaction	Total Amount	Outstanding Amount
Fall 2022 Quarter	12/08/2022	01/21/2023	Student Health Insurance	2,773.00	2,773.00
Fall 2022 Quarter	12/08/2022	01/21/2023	University Enhancement Fee	218.00	218.00
Fall 2022 Quarter	12/08/2022	01/21/2023	Tuition Undergraduate	18,960.00	18,960.00
Fall 2022 Quarter	12/08/2022	12/08/2022	Tuition Insurance Plan	63.00	63.00

This tab provides a list of unapplied payments on the student account. Unapplied payments may not have applied to outstanding charges for reasons related to payment precedence.

Unapplied Payments 0 items						
Academic Period	Posted Date	Transaction	Total Amount	Unapplied Amount	Refund Eligible	Encumbrance End Date
			No items available.			

7. The **Historical Transactions** tab

Historical Transactions

The Historical Transactions tab would display historical transactions from SCU's legacy tenant if those transactions are converted.

0 items						
Institution	Academic Period	Transaction Date	Transaction	Amount	Currency ID	Reference 1	Reference 2
			No items available.			