View Student Financials

1. **Click the Student Financials link.**
   ▷ Student Financials

2. Click the **View Customer Accounts** link. View Customer Accounts

3. Enter the desired information into the **ID** field.

4. Click the **Search** button.
   Search

5. This page displays the current balance on each account type by term. The STUDENT001 account contains tuition, General Student Fees, meal plans, housing, payments related to these items, Financial Aid credits, refunds etc.

   The MISC001 account contains library fines, parking fines, payments related to these items, etc.

   You will notice that charges and Financial Aid credits always stay with the term with which they are associated but personal payments may move from one term to a previous or future term depending on the account balance.

6. Click the **Academic Information** link.
   Academic Information

7. This page displays the student's Career, Primary Program, the number of Units for which the student has been billed by term & accumulative, the Academic Level and the Academic Load.

8. Click the **Academic Plan** link.
   Academic Plan

9. This page displays the Academic Plan for the student.

10. Click the **Show Next Row** button to view additional academic plans.
    ▶

11. Click the **Return** link.
    Return

12. Click the **Enrollment** link.
    Enrollment

13. Enrollment information displays for the selected term.

14. Click the **Class Info** link.
    Class Info

15. This page displays specific information regarding the time and location of the class that was selected.

16. Click the **Return** link.
    Return

17. Click the **Return** link.
    Return

18. Click the **Return** link to go back to the **Customer Accounts** page.
    Return

19. Click the **Account Details** link.
    Account Details

20. Click the **Item Details** link.
    Item Details

21. Item details display.

22. Click the **Return** link.
Return

23. Click the **Return** link.
Return

24. Click **View Anticipated Aid**.
View Anticipated Aid

25. This page displays anticipated aid which may have already been applied to the student's account.

   Note: Aid is anticipated until it is disbursed.

26. Review Anticipate Aid. Click **Return** to go back to the Customer Accounts page.
Return

27. The **Cur Snap** and **Hist Snap** functions will create either a snapshot of the student's current term transactions or you can run it to display all transactions for the current term and all previous terms.

28. Click on the **Cur Snap** icon to open up the students current financial snapshot. It may take a minute for the report to load.

29. The student's current financial snapshot is now displayed.

30. Click the **Hist Snap** button to open up the students current financial snapshot. It may take a minute for the report to load.

31. The student's historical financial snapshot is now displayed.

32. **End of Procedure**

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