



Student Financials
Created on 6/21/2011

Notice

© 2011, Southern Methodist University. All Rights Reserved. Published 2011.

The information contained in this document is **proprietary** to Southern Methodist University. This document is for use by employees of Southern Methodist University **ONLY**.

Please address requests for exceptions, permission to duplicate, and/or distribute, to the following:

Administrative Systems Training Team
Business and Information Technology Services
Southern Methodist University
P.O. Box 750262
Dallas, TX 75275-0262
Telephone: (214) 768-1824
Email: adminsysteam@smu.edu

Table of Contents

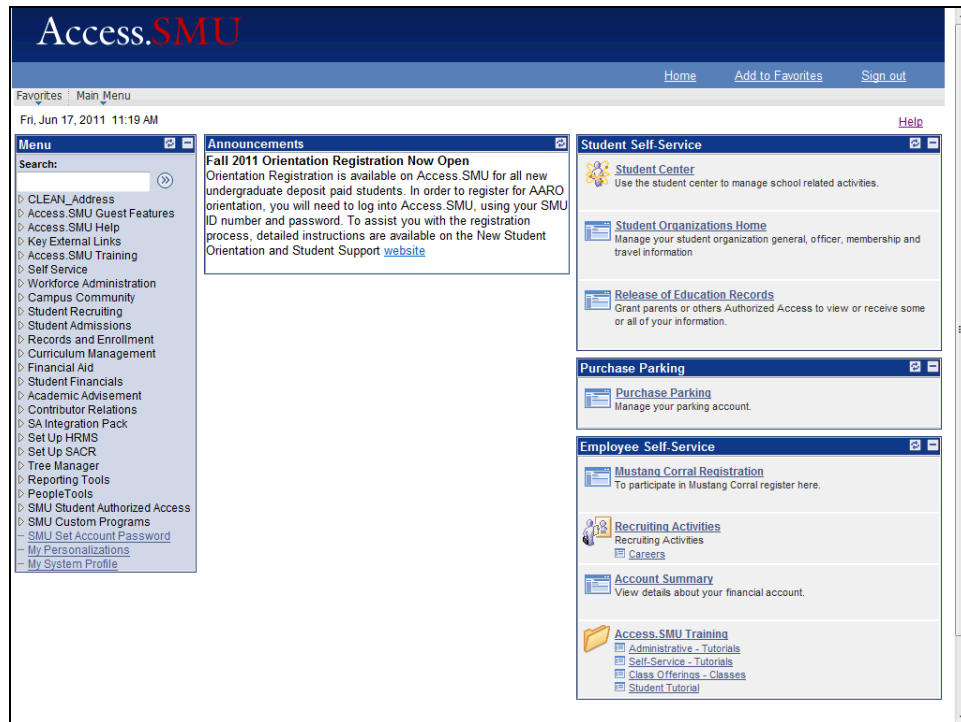
Student Financials	1
Getting Started	1
Viewing Student Financials	1

Student Financials

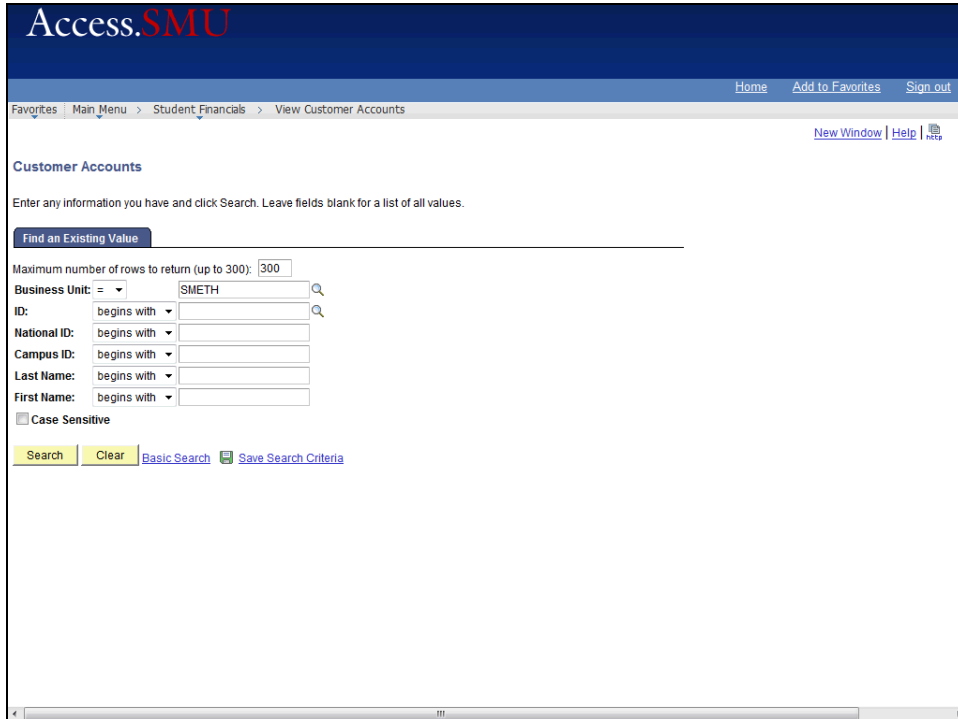
Getting Started

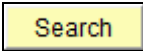


Viewing Student Financials

Procedure



Step	Action
1.	Click the Student Financials link. ▶ Student Financials
2.	Click the View Customer Accounts link. View Customer Accounts



Step	Action
3.	Enter the desired information into the ID field.
4.	Click the Search button. 
5.	<p>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.</p> <p>The MISC001 account contains library fines, parking fines, payments related to these items, etc.</p> <p>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.</p>
6.	Click the Academic Information link. 
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. 
9.	This page displays the Academic Plan for the student.



Step	Action
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

Access.SMU

Home Add to Favorites Sign out














Favorites Main Menu > Student Financials > View Customer Accounts [New Window](#) | [Help](#) | 

Customer Accounts

Cur Snap  Hist Snap 


Business Unit: SMETH
Mustang, Jackson EmplID: 12345678 [Academic Information](#)

Total: 19,715.00 Anticipated Aid: 0.00

Account Type	Account Number	Balance	Open Date	Status	
Student	STUDENT001- Fall 2011	19,715.00 USD	04/05/2011	Active	Account Details   
Misc	MISC001 - Spring 2011	0.00	01/19/2011	Active	Account Details   
Student	STUDENT001- Spring 2011	0.00	11/02/2010	Active	Account Details   
Misc	MISC001 - Fall 2010	0.00	08/13/2010	Active	Account Details   
Student	STUDENT001- Fall 2010	0.00	04/07/2010	Active	Account Details   
Student	STUDENT001- Summer 2010	0.00	02/17/2010	Active	Account Details   
Misc	MISC001 - Spring 2010	0.00	01/13/2010	Active	Account Details   


Go to: [Detail Trans](#) [Item Summary](#) [Items by Term](#) [Items by Date](#) [Due Charges](#) [Payment Plans](#) [View Anticipated Aid](#)

[Return to Search](#) | [Notify](#)



Step	Action
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.

Access.SMU



















Home Add to Favorites Sign out

Favorites Main Menu > Student Financials > View Customer Accounts [New Window](#) | [Help](#) | 

Customer Accounts


Cur Snap  Hist Snap 

Business Unit: SMETH
Mustang, Jackson EmplID: 12345678 [Academic Information](#)
Total: 19,715.00 Anticipated Aid: 0.00

Account Type	Account Number	Balance	Open Date	Status	
Student	STUDENT001- Fall 2011	19,715.00 USD	04/05/2011	Active	Account Details   
Misc	MISC001 - Spring 2011	0.00	01/19/2011	Active	Account Details   
Student	STUDENT001- Spring 2011	0.00	11/02/2010	Active	Account Details   
Misc	MISC001 - Fall 2010	0.00	08/13/2010	Active	Account Details   
Student	STUDENT001- Fall 2010	0.00	04/07/2010	Active	Account Details   
Student	STUDENT001- Summer 2010	0.00	02/17/2010	Active	Account Details   
Misc	MISC001 - Spring 2010	0.00	01/13/2010	Active	Account Details   

Go to: [Detail Trans](#) [Item Summary](#) [Items by Term](#) [Items by Date](#) [Due Charges](#) [Payment Plans](#)

[Return to Search](#) | [Notify](#)

Step	Action
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.