Sign in to PeopleSoft

PeopleSoft is accessible through the Internet. Follow these steps to access the website:

1. Click on the Explorer icon.
2. Enter the website address for Enroll and Pay, or the production database from the favorites list.

These fields for sign on are case sensitive.

3. Enter your User ID.
4. Enter your Password.
5. Click on the button following the Password field (“Submit”) or press the return key (Enter) on your keyboard.

Caution: Never Use the Back Button!

**All information on the Customer Account is Confidential** to the customer. Release to any other parties is not allowed without the written permission of the customer on the FERPA form. These forms are administered by the offices of the Bursar and Student
Financial Aid and are available on the Bursar’s web page. Information as to whom information may be released is available on the University’s Image Now data resource.

The panel below will appear. Click on “Student Financials” in the left menu.

How much of this panel appears to a user will depend on their security assigned.
The system will bring up the following panel. In version 8.9, there is a left menu which may be kept in view and can be used for navigation, or it may be sequestered by clicking on the dark blue “Menu” bar on the (-) button to the right.

Notice that the boxed areas to the right are sub-menus with a title. That title corresponds to a link in the left menu, i.e. Cashiering.

The same scheme is true for the View links at the bottom, i.e. View Customer Accounts.
In the left menu, if you click on one of the titles, i.e. Charges and Payments, then the submenu would appear in the left column also.

If you click on the folder for “Charges and Payments” or on the highlighted link, the whole submenu will appear in one place or the other.

You will note as you click on additional titles in the drill-down process, a bread crumbs line of sorts is developed on the blue bar above the heading Charges and Payments.
Here is a menu that may be more in keeping with actual personal security. Click on Student Financials. Click on View Customer Accounts.

Notice at the top the title is Customer Accounts. In Box 1, the categories of search possibilities are stated. In Box 2, the method of search using values such as (continues on next page):
If you change any of the search categories and want to save the new setup as a common search, click on the “Save Search Criteria” link.

Enter a name for your special search (no improper wording please) and click on SAVE. Click on “Return to Advanced Search”. The name of the search will appear in a new field called, “Use Saved Search”. Notice that there is a down arrow to choose which saved search setup to use.
Notice that the Saved Search field does not have room for a long discourse, 11 digits are shown. There is also a new link entitled “Delete Saved Search” which can be used to delete any saved search.

Since there is only one saved search, there is no down arrow to choose other settings. If it is desired to delete this saved search, then click on “Delete”. Then click on “Return to Advanced Search”.
Search for the Customer Account.

1. Business Unit: This should default in as “Ukans”. If it does not default in, check on the User Defaults panel (Setup SACR), the Business Unit field may not be populated, if not, do so and SAVE.
2. ID: This is the student’s PeopleSoft ID number (7 digits). This is the number the University will use to identify the student. Type in the number and press “Enter” on the keyboard or click on the yellow “Search” button. If you click on the magnifying glass (DON’T do it!), it will bring up all people in the University with their IDs. This is a long list, is slow to load, and is to be avoided, not user friendly.
3. National ID: This is the student’s social security number. This number or any of the numbers or name information may search accounts.
4. Campus ID: This ID is the student’s old legacy (six digits) number.
5. Last Name: Enter all or a portion of the last name. If it is a common name, the more you enter the better. The system will bring all names that match your search, but will populate only the first 300. You may not search by the first name only, use the last name and all or a portion of the first name).
In this example, the last name of Jayhawk has been entered and the five accounts that exist have been displayed in the list under “Search Results”.  
Click on the appropriate name and the system will bring up the student’s account.  If you have the first and last name and there is only one by that name, the system would bring up the student’s account directly and not populate the screen with a list.

If you have the student’s ID, enter the following information on the search panel:

Click on Search or press Enter.
If the ID number is not correct, the following message will appear:

With the message of “No matching values…” no account exists with the data as entered. The information could have been entered with an error, or the data was correct, but no account exists at this time. Then the data would need to be verified through some other access to determine what is correct. A possible location would be Campus Community > Person Information. If access to that panel does not exist, please call the Office of the Registrar to verify the information.
We searched for 7654321 and this account appeared:

![Customer Accounts](image)

This is the main page of the student’s account.

1. Student’s Name.
2. Student’s ID Number
3. Total: This amount is how much the student owes. In order to see what charges are due, you will need to “drill” down on the different “Account Types”. Go to #6 to see how this is done.
4. Service Indicator: This example shows a negative (circle with slash) and a positive (star). Negative ‘SIs may represent a past due balance, or to block a service because of some incomplete requirement, i.e. Immunization Hold. Click on the indicator to view the message(s) on this account. A Positive SI may indicate Ferpa information for the Office of the Bursar and Financial Aid, or that a declared major exists, etc.
5. Should the account have Financial Aid as an expected credit, an amount will appear in this location. However, to determine for which Term and amount per term, it would be necessary to “drill” down on the link as appears on page 29 of this document.
Negative Service Indicators

The NPY SI shows a past due balance exists creating a hold on the student’s account as well as a hold from the Parking department. This panel indicates when the SI originated and what department it represents. To view more information, click on the “Detail” link.

1. This panel shows the origination source of the hold, in this case, Loper is the scheduled system method using the rules for Credit History as the process.
2. Also indicated are the service impacts because of the hold. IENR prevents enrollment for a new term, and TRAN prevents issuance of a Transcript.

These holds also appear on the student’s Self-Service web accounts. When finished, click on the yellow “Return” button. The main SI page will reappear. To return to the main customer account, click on “Return” again, if you want to leave this.
customer account, click on the “Return” again. OR, if you are three panels deep and you want to exit this customer account, click on the left menu to the area of operation desired, i.e. charges and payments.

Positive Service Indicators

The Positive ‘SIs (star) navigate the same as the negative. These do not have Service Impacts that prevent services. A Positive SI could be for the Ferpa form on file with the Offices of the Bursar and Student Financial Aid; the EFT, indicating the student has given information for refunds to be sent directly to their bank account, etc.

Academic Information link

This panel shows the number of hours enrolled by Term (Units) and their total cumulative credits (Total Units). It also shows the student’s class level and Academic Load. The “Academic Plan” (Major fields) and “Enrollment” (student’s class schedule) links can be used to find more detailed information.

Starting with Fall, 2007, the “Group” will identify the Compact Group to which the student was assigned by their original enrollment.

To return to the main page, click on the “Return” link.
Details of the Customer Account Main Page

Below the Blue bar of this panel, detail of the account becomes available. Notice on the bar, the information as to number of records to view and the arrow to proceed to the next record, and the link to “View All” which will populate all the records and a scroll bar to view.

The column Account Type refers to the general category of charges within which the detailed charges are located. I.e. “Tuit & Fee” is the Account Type for detailed items such as Tuition In State Undergrad, Tuition Out of State Undergrad, Tuition In State Graduate, Differential Fees, Required Campus Fees, etc.

To view the charges for this account click on the Account Details for this Account Type to the right portion of the screen and highlighted.

Account Number is a repeat of the Account Type plus a number applied by the system. Also, if an Account Type is “PerTerm”, next to the number will appear the term description with year and season.

Balance is the outstanding amount for charges within that Account Type.

Open Date is the date that Account Type first incurred a charge.

Status should always be “Active”.

Account Details link is highlighted and may be used to find further information for the description of the charge(s), and payments that have been applied to those charges.
The 3 C’s, Communications, Checklist, and Comments. These keys are used for information. Some departments do make use of these tools. The availability of information contained herein is controlled by security.

At the bottom of this panel are links of information sorts that will be discussed later; see page 20.

Click on the Account Details for “Tuit & Fee”. Travis didn’t have Tuition and Fees with Differential charges, so I went to the account for Amanda.

Account Details

…link to view charges and payments to this Account Type.

1. Click on the “View All” link if not all of the lines are showing (on the blue bar).
2. Account Balance: **This is not the balance of the Student’s Account.** This amount is what is owed for this Account Type only.
3. Debits: This is the total amount of charges for this account type.
4. Credits: This is the total amount of payments (including credits) for this AT.
5. Item: This is the description of the payment or charge.
6. Class: This is a course class name associated with the charge, i.e. Introduction to Art 101.
7. Term: The semester or term effective for the charge, or effective at the time of the payment.
8. Item Status: This should always be “Active”.
9. Last Activity Date: The last date a transaction occurred for this Item.
10. Amount: The net total amount of the Item, payment or charge.
11. Balance: The amount outstanding on a charge, or unapplied on a payment.
Click on Item Details of a payment:

1. Item Number and Payment ID Number: Every payment is assigned Item and Payment ID Numbers by the system.
2. Item Type: Every payment Item Type has a unique Description and the GL debit and credit data associated with it.
3. Account Split for Payment: The various charges paid by this total payment appear in this box by Account Type.
4. Details: Shows posting, effective, etc. dates and amounts for this payment.
5. Charges this Payment paid: The list of charge Items by Description paid by this payment.

It may be necessary to click the “View All” link if there are more than two lines in a box. Each box will have its own such functionality in the blue bars.

You will need to click on the “Return” link to go back to the previous screen. There is not a “Return to Beginning”. 
This panel is Item Details a charge:

Notice at the top is the name and ID number for confirmation and description of the charge.

1. **Item Amount**: This is the amount of the total charges; then notice the **Applied Amount** and **Balance**. The Applied refers to any credits (payments & reductions) that should pay toward the charges. This Balance only represents the balance of this Item.

2. **Details**: This section shows when the charge was posted, billed, and the due date. Notice this box is indicating additional charges posted each of 5-19-05 and 7-9-05.

3. “**Payments paying this Charge**”: This section shows what payments have paid this charge.

You may want to click the “View All” link if there are more than two lines in a section. Each box will have its own links on the blue bars.

Click on the “Return” link to go back to the previous screen. The further you drill down, the more clicks necessary to return to the main page of the customer account.
For payments made through the cashier window, a Receipt Details link will appear next to the payment item in the Account Details Link.

Click on the Receipt link and it will display lots of information.

Notice this electronic form of the receipt has the ID, Name, and Receipt Number at the top. Then you have the “where and time” factors in the middle section and the total amount of the receipt. If the cashier typed in any reference information, it would show below the date.
Then the Target and Tender boxes are shown. Any Target that starts with “Check” means that payment has an encumbrance of 14 days before it would be eligible for refund in case the charges were cancelled or other aid applied and bumped the payment to excess.

There may be rows of target or tender and you may want to click on the “View All” to view all the information.

The tender data is how much was paid in what form, Check (personal checks), Guaranteed Check, Cash, etc. We do not use the “Tender Details”, so that link can be ignored.

Return to the Customer Account main page.

**Sort Links**

On the bottom of the main page are links you may click to view the account data in different sort formats, to see if the student has a sponsor contract, deferment contract, or if they have Student Financial Aid expected for the new Term and for which terms.
1. Click on the “Detail Trans” link.

This panel is sorted in Alphabetical order by Account Number and then by Term. The
“Item Description” tab has the “Item Number”, “Term”, “Account Number”, “Account
Term”, “Item Type”, and “Item Amount”.

This link will not show what is currently due on the account. The “Item Amount” is the
amount of the original charge or payment.

The “Item Number” column will carry over to the next tab. There are 107 rows of data in
this link. So if you were looking for an item that is half way down, it would not be
helpful to have to count down the rows till you reached row 50, for instance.

Notice Item 000…013 is a Refund for $1293.00.

Click on the “Item Detail” tab.
Find Item 13 on this tab, now you can easily follow the line across to the desired data.

The “Item Detail” tab extends the lines you were viewing in the “Item Description” tab. In this tab you have the “Item Number”, “Due Date”, “Billing Date”, “Actual Bill Date”, “Effective Date”, Posted Date and Time, “Action”, and “Reason”.

Click on the “Return” link at the bottom of the panel to return to the main page of the account.
2. Click on the link “Item Summary”

This panel is sorted alphabetically by “Item Type” description, charges and then payments. This panel shows the current balance of each “Item Type”. In this tab is data for “Item Type”, “Term”, “Account Number”, “Account Term”, “Item Amount”, and “Balance”.

In this sort, it is the “Item Type” description which is the key field that carries over to the next tab.

Click on the “Item Due Date” tab.
The “Item Due Date” tab extends the lines you were viewing in the “Item Description” tab. In this tab you have the added data of “Due Date” and a link to click if you want further information.

Click on the “Return”

3. Click on the link “Items by Term”

This panel is sorted by term. Look on the blue strip under the student name and ID to determine the number of terms on the account. Click the:

- yellow arrow to view the different terms one by one;
- View All to scroll through all of them;
- Last to go to the most recent term.

The oldest term will default in as the first record.

The “Total” on this display may not represent the balance of the customer account, but only the balance of the items shown within this display of the term.

Charges may be labeled for a term other than the current term. Payments are labeled for the effective term on the date received. I.e., if a student enrolls today for the next term, charges for the next term tuition and fees will apply but labeled for the next term. If that student pays for those charges on the same date, the current term label will apply to the payment.

Click on the return.
4. Click on the “Items by Date” link

At the bottom of this link is a list of the Invoices (bills) that have been produced and the date and amounts for each. Ignore the Totals column.

Etc.
This account has a lot of data.

You may select how you want to sort the panel by using “Posted Date”, “Effective Date”, or “Due Date”. You can also put in certain dates “From” and “To” for a range. Select the type of date you want by clicking on the radial button next to the name of the date type. To change the data sort, enter the dates or types you want then click on the yellow “Search” button.

This sort used the Billing date as the key field and started with Jan. 1, 2005 to the current (year 2100 ought to cover that for a while). For accounts with several years of data, the search parameters are helpful tools.
Items by Date will indicate which items remain to be paid. The “Total” column on this panel is a running total from the most recent record and not helpful. At the bottom of the total column is how much the student currently owes.

Click on the Return button.

5. Click on the “Due Charges” link.

The View All and other links were highlighted and have been used to expand the fields.

In the box, “By Due Date” is shown the amounts due by the Due Date. In the box, “By Item” is shown the items still outstanding with the associated Due Date. The column, “Due Amt” is the amount outstanding for that item. The “Total Due” column is a running total of the charges. The last amount in this column is the balance on the customer account. This sort omits charges that have been paid, no longer due.

Click on the Return link.
6. Click on the “Payment Plans” link.

This panel shows the contract(s) data if all or a portion of their account is paid by a Third Party Organization. In this example, the Buttermilk Floats and Malt Co. shows as the sponsor. The Contract Number will usually begin with the 4-digit term number. Notice the status to the right shows “active”, and the organization number is shown to the left of that. The status could change to “cancelled”, in which case that contract no longer applies to the account and the amount paid by the sponsor would change to 0 (on tab Plan Detail). The details remain visible for information purposes.

This link also shows the student has a Deferral contract considered in SF to be a Payment Plan. Deferral contracts do not affect the balance due, but do change the Due Dates of charges.

Click on the tab, Plan Detail.

This tab extends the lines you were viewing in the “Plan Description” tab. Notice the Total amount for which the student is sponsored. This amount could change if the amount of the sponsored charges change or the maximum amount of the sponsorship should change.
Notice the box titled “Student Max”. This is the maximum dollar amount the contract will pay per student.

7. Anticipated Aid Link.

Notice the message about Anticipated Aid. To find information as to the term it will apply and amount, click on the View Anticipated Aid link.

This is the link for Aid that has not yet applied to the account, or may have very recently and the message for the current term simply has not disappeared as yet.

1. Note the term that is shown. The data shown below the stated term is the current anticipated aid for that term.
2. Note the blue bar with tools for advancing forward for other rows representing other terms. In this case, Spring 2006 is the only term of information available.
3. The Total is for the total anticipated aid per term displayed.
Click on the Returns to search for another account.

There is not a link from the Customer Account to find addresses (with the exception of the Refund address which accompanies the Details of the Refund in the Account Type Excess). A good panel to use for addresses is in Campus Community > Personal Information (student) > Biographical (Student) > Addresses/Phones > View Addresses.

To enter this panel, a search is provided using the ID number or name. Notice the Address information includes the Address Type and the Effective Date of that address. You may click on the View Address Detail for historical addresses per Address Type.

If you need navigation for your work that is not apparent in your security, contact your supervisor to notify Joanne Hickey.