Entering/Modifying and Posting a Charge for an Individual Student

Use this instruction guide to enter and post charges for individuals students. To complete this task, you must attend PST310 Student Financials and have the security roles:

- UF_SF_UPDATE_CHARGES
- UF_SF_PP_XXXXXXX - Defines your scope of authority where XXXXXXX = your department/unit

Enter and Post a Charge
1. Login to myUFL
   - Click the Login button
   - Open an internet browser
   - Navigate to my.ufl.edu
   - Click the Access myUFL button
   - Enter your GatorLink username and password
   - Click the Login button

2. Navigate to UF Campus Solutions > Charges and Payments > Post Student Transaction

3. Enter the Student’s UFID

4. Enter the appropriate account into the Account Type field
   - This field represents your department or unit

5. Enter or look up the appropriate Item Type
   - Only those to which have security access will be available to you

6. Click the Add button

7. Enter the appropriate amount into the Amount field
   - If you are modifying a charge, enter the adjusting amount

8. Click in the Term field and enter the term
   - The first digit is the century (1 = 20th century; 2 = 21st century)
   - The second & third digits are the last digits of the calendar year (08 = 2008; 15 = 2015)
   - The fourth digit is the semester and the Registrar codes the semester based on the month the semester begins (1-January = Spring; 5-May = Summer; 8-August = Fall)

9. Click in the Item Effective Date field and enter or select the effective date
10. Click in the Due Date field and enter or select the due date
    - The due date can be changed to further in the future, but cannot be any sooner then 30 days
11. Click the Post button
    - Clicking the Post button begins the Due Date “clock”

View the Transaction
There are several ways to view the activity associated with a student. The instructions below reflect an administrative view which mimics the way a student can view the activity.

1. Navigate to UF Campus Solutions > Student Financials > Account Activity
2. Enter the UFID of the student in the ID field
3. Click the Search button
4. Use the Account Activity page to view the posted transaction
   - The student will have access to this page to view his/her account activity
   - NOTE: The student will navigate to My Campus Finances > Account Activity

For Further Assistance
- Review the myUFL Toolkit for Student Financials at the Human Resource Services website
- Navigate to hr.ufl.edu and select: Training > myUFL Toolkits > Student Financials
- Click here: http://www.hr.ufl.edu/training/myUFL/toolkits/StudentFinancials.asp
- Contact the UF Help Desk at helpdesk@ufl.edu or call them at (352)392-HELP

If you need assistance, please contact the UF Help Desk at 392-HELP or helpdesk@ufl.edu.