Student Financials

REVIEWING STUDENT ACCOUNTS
NU Customer Accounts

The NU Customer Account page in the Student Financial System provides a real-time snap-shot of a student's account. The status of a student's account is one of the most frequently requested pieces of information in the CAESAR/Student Enterprise System (SES). This procedure will show you the most effective ways to look up student account information and answer parents' and students' questions such as:

What is my current balance?
How much is my tuition for this term?
Has my most recent payment been received?
Has my financial aid been applied to my account? When do I have to pay?
How much refund can I expect?
What is the status of my 9PAY application?

Step by Step Guide

Using the NU Customer Accounts Page

NAVIGATION

From your **Administrator Homepage,** click on the **Classic Home** tile, and navigate from the **Main Menu** to **NU Customer Account**.

Enter the criteria you wish to search on and press the Search button.

Note: to search on SSN, enter the SSN# in the field labeled National ID. You can also search on NetID by entering the student's NetID in the Campus ID field.

If the system locates only one match, you will be taken directly into the NU Customer Accounts page. If the system locates more than one person who is a potential match, select a student's record from the Search Results returned, by clicking on the name in the row you wish to select.

The NU Customer Accounts page appears.

There are three sections on the NU Customer Account page:

1. The top section displays the **Student ID** information as well as various links which allow you to drill down to access more detailed information.

2. The next section displays **Grand Totals** (current totals) for the student's account.

3. The lower, and largest, section displays the **Term Totals**. Within the Term Totals section, you will find:

The **Term Detail** section which displays the itemized detail transactions for the selected term.

The **Anticipated Aid** section which displays the Anticipated Financial Aid for the selected term.

Northwestern University Customer Account

Equtn Var | Unapp Dep | Acad Info ★

ID: 3991234   Wildcat, William   UGRD   04CAS   9PAY

Grand Total:

	Account Balance	Anticipated Aid	Net Balance	Dir Deposit
	$0.00	$0.00	$0.00	N

Term Total   Find | View All   First ◀ 1 of 10 ▶ Last

Term	Account Balance	Anticipated Aid	Net Balance
2017 Fall	$0.00	$0.00	$0.00

Detail   Personalize | Find | 🔲 | 📊

Item Type	Description	Itm Eff Dt	Posted	Bill Date	Item Amt	User ID
1213901	Fall Tuition-Undergraduate	08/01/2017	08/01/2017	08/10/2017	17413.00	PDSFDEVL
3006000	Student Health Plan	08/08/2017	08/08/2017	08/10/2017	3856.00	PDSFDEVL
3535444	Student Health Fee	08/01/2017	08/01/2017	08/10/2017	67.00	PDSFDEVL
3535555	Student Athletic Event Fee	08/01/2017	08/01/2017	08/10/2017	53.00	PDSFDEVL
3535990	ASG Activity Fee	08/01/2017	08/01/2017	08/10/2017	62.00	PDSFDEVL
9696999	Payment - Thank You Ev	08/25/2017	08/25/2017	09/10/2017	-21451.00	BREYS0

Anticipated Aid   Personalize | Find | 🔲 | 📊

Item Type	Description	Apply Dt	Expire Dt	Net Award	Awd Stat

ID Section

The first section of the NU Customer Accounts page contains the student's ID (EmplID), and Name. In addition, the Equation Variables link (Equtn Var) which contains attribute information, the Unapplied Deposits link (Unapp Dep) which displays unapplied deposits and the Academic Information link (Acad Info) which displays registration information all appear here.

One or more of the following icons may also appear:

⊘   Negative Service Indicator

★   Positive Service Indicator

🖥   FERPA indicator (only for students who opted for it)

💬   Comment

Please refer to the end of this document for detailed information about these links and icons.

Grand Total Section

The second section of the page displays the sum of all charges and payments made to the student's account but may not include payments made through QuikPAY or peerTransfer (for international students) in, at least, the last 48 hours (or 2 business days)..

- The **Account Balance** is the student's overall accumulative actual account balance not including Anticipated Aid.

- The **Anticipated Aid** is the overall accumulative total amount of anticipated financial aid pending disbursement up to this point.

- The **Net Balance** is the student's overall accumulative current account balance including Anticipated Aid. (In other words, the Account Balance minus the Anticipated Aid equals the Net Balance.)

- The **Dir Deposit** indicates if a student has signed up for Direct Deposit, allowing refunds to be directly deposited into their bank account.

You will look at the Net Balance in the Grand Total section to answer the question "What is my current balance?" Note: A negative amount in the Net Balance indicates a credit balance (in most cases, this will be the amount available for a refund).

Term Total Section

The Term Total section of the page displays the account totals for individual terms.

- The **Account Balance** is for the selected term only and does not include Anticipated Aid.

- The **Anticipated Aid** is the aid for the selected term only. It does not include future anticipated aid or anticipated aid from previous terms.

- The **Net Balance** is for the selected term and includes Anticipated Aid. (In other words, the Account Balance for the Term minus the Anticipated Aid for the Term equals the Net Balance for the Term.)

Note: The Scroll buttons allow you to scroll between terms. A term will only appear on this page if there have been transactions posted to it.

Term Detail Sub-Section

The Term Detail section of the page displays the itemized detail transactions that occurred during the selected term. This page includes charges and payments as well as applied financial aid.

The following information is included in this section:

- Item Type – a number representing a unique transaction code of charges and credits. It differentiates the various charges and credits applied to the student's account.
- Description - description of individual transaction (item type)
- Itm Eff Dt - the date the transaction occurred
- Posted - date transaction was posted to the system
- Bill Date - date transaction was invoiced
- Item Amt - amount of individual transaction
- User ID - ID of the individual or process that posted transaction

You will use this section to answer the following questions:
"How much is my tuition this term?" – Tuition charges are listed at the top of Detail section.

"Has my most recent payment been received?" – Payments will appear in some version of "Payment.....", for example, "9696999 Payment Thank You   Ev" or 9693999 Payment-Thank You Credit Card", and the date the payment was applied will appear under the "Posted date" The date the payment was made will be listed under "Item Eff Date.

Anticipated Aid Sub-Section

This section of the page displays the Anticipated Financial Aid for the selected term.

Note: If there are no transactions posted to a term, you will not be able to see the Anticipated Aid for that term because only terms with posted transactions will appear on this page. The following information is included in this section:

- Item Type - item type number
- Description: description of the anticipated aid
- Apply Dt: date aid is anticipated to be posted to the student's account
- Expire Dt: date anticipated aid is scheduled to expire if not posted to the student's account
- Net Award: amount of anticipated aid
- Awd Stat: status of the award (A=the award has been accepted O= the award has been offered, but not accepted)

You will use this section to answer the question "Has my financial aid been applied?" All applied financial aid will appear in the Term Detail; all financial aid still waiting to be posted for the term will appear in the Anticipated Aid section..

ID Section Details

The ID Section contains the student's ID (EmplID) and Name. In addition, the Equation Variables link (Equtn Var) which contains attribute information, the Unapplied Deposits link (Unapp Dep) which displays unapplied deposits and the Academic Information link (Acad Info) which displays registration information all appear here.

1. **The Equtn Var link:**

    Click on the Equtn Var link to access the Equation Variables sub-page. This sub-page displays Equation Variable information by term. Use the scroll buttons to scroll between Careers. Use the scroll buttons at the next level to scroll between Terms.

The Equation Variables are described below:

Equation Variable	Description
F/S Code	Faculty/Staff Code indicates status if student is also an NU employee Relates to Faculty/Staff rebate for tuition Contact Student Accounts office for further information
Hosp Insur	W - Waive hospital insurance Y – Will be charged for hospital insurance
Bill Suppress	If Alpha code appears, bill is being suppressed. This means account is in collections. Contact Student Accounts office for further information.
Med School Term Counter	Number of full tuition paid terms for medical students
Number of Bad Checks	Number of returned checks
Suppress ASG/Activity Fee	Undergrads only: Y = Suppress; N = Do not suppress fee

2. The Unapp Dep link:

The Unapplied Deposits sub-page displays information concerning deposits, which have been posted to the student's account but not yet applied to charges.

Unapplied Deposits

Detail				Find | View All	First	1 of 1	Last

Term	Item Type	Description	Eff Dt	Posted	Payment
2018 Sprng	9315803	Tuition Deposit - PT MBA CC	07/21/17	07/24/17	$-1,000.00

This allows you to see all of the unapplied deposits in one place. There are three types of unapplied deposits normally displayed:

- Tuition Deposit
- Room Deposit
- Damage Deposit

The Effective Date indicates the date the deposit was received and the Post Date is the date the deposit was posted.

3. The Acad Info link:

Customer Accounts
Academic Information

Bio/Demo Data

ID 3991234		**Name** Wildcat, William	
Campus ID WIL987		**Gender** Male	

Citizenship		Find | View All First 1 of 2 Last	National ID		Find | View All First 1 of 1 Last
Country	**Description**		**National ID Type**	**National ID**	
United States	Not Indicated		Social Security Number	*****XXXX	

Career Term Data — Find \| View All First 1-4 of 10 Last

Term	Career	Primary Program	Residency	Tuition Group	Units	Tot Units	Level	Academic Load		
2017 Fall	UGRD	WCAS		UG	3.000	24.000	Junior	Full-Time	Academic Plan	Enrollment
2017 Summr	UGRD	WCAS		UG	0.000	21.000	Junior	No Units	Academic Plan	Enrollment
2017 Sprng	UGRD	WCAS		UG	4.000	21.000	Sophomore	Full-Time	Academic Plan	Enrollment
2017 Wintr	UGRD	WCAS		UG	3.000	17.000	Sophomore	Full-Time	Academic Plan	Enrollment

Return

The top portion of this page displays bio/demo data such as: gender, citizenship and the last 4 digits of National ID (SSN).

The bottom portion displays career data by term, such as: career, program, unit load, academic load and level. The scroll buttons allow you to view additional terms as needed.

Clicking on the Academic Plan link located to the right of the term you wish to select will display the Academic Information, Academic Plan sub-page. This page displays the student's academic plan history. You can scroll through the terms to view the student's plans.

Clicking on the Enrollment link located to the right of the term you wish to select will display the Academic Information, Enrollment Summary sub-page. This page displays the classes in which the student is enrolled for the term. Information about each class is provided, including: class number, number of units and the Add or Drop date.

The scroll button allows you to view additional classes for the selected term as needed or click View All to view all classes the student enrolled in for the selected term (including all dropped courses).

While in the Enrollment Summary sub-page, clicking the Class Info link next to a specific class will provide additional information about that class, such as where the class meets, when the class meets and the instructor name

4. ⊘ Negative Service Indicator

Clicking the icon will open the Manage Service Indicators sub-page which displays the type of hold and the reason for the hold.

5. ★ Positive Service Indicator

Clicking the icon will open the Manage Service Indicators sub-page which displays the type of hold and the reason for the hold. In many cases the positive service indicator confirms a student record has been audited and transcript can be released, if requested.

6. ⬚ FERPA

FERPA stands for the Family Educational Rights and Privacy Act. A FERPA icon on a student's NU Customer Account page means a student has requested to invoke FERPA to block the release of Directory Information. At Northwestern University, Directory Information is limited to:

- name
- local and home address and telephone
- e-mail address
- school or college
- class
- major field of study
- dates of attendance
- enrollment status
- expected graduation date
- degrees and awards received
- the most recent educational institution attended
- weight, height and age of members of varsity athletic teams
- photograph of the student taken for University purposes, such as a WildCard photograph

Directory information also includes class rosters listing students in a Northwestern academic course; such rosters may only be used for the purpose of conducting that course. In addition, directory information includes NetID, but NetID will be used for internal campus use only.