SA Project Upgrade
Student Financials

SA Student Administration
Boston • Dartmouth • Lowell

General Page Navigation

Page navigation has changed in the SA Application. This document provides you with the new location of all your key Student Financials pages.

Student Financials	
Page	**New Path**
Customer Accounts	Student Financials → View Customer Account
Invoice Info Student	Student Financials → Bill Customers → Student Bills → Review Invoice
Student Invoice Summary	Student Financials → Bill Customers → Student Bills → Student Invoice Summary
Equation Variables	Student Financials → Tuition and Fees → Equation Variables
Tuition Calculation	Student Financials → Tuition and Fees → Tuition Calculation
ePayment Transaction Log	Student Financials → Charges and Payments → Electronic Transactions → Electronic Payments → Review Transaction log
Review Transactions	Student Financials → Charges and Payments → Group Processing → Review Transactions
Health Insurance History	Student Financials → Charges and Payments → UMass Custom(UM) → Health Insurance History
Health Insurance Audit	Student Financials → Charges and Payments → UMass Custom(UM) → Health Insurance Audit
Health Insurance Audit	Student Financials → Charges and Payments → UMass Custom(UM) → Health Insurance Waivers
Suspended Group Post	Student Financials → Charges and Payments → Group Processing → Review Suspended Transactions
Zero Out Anticipated Aid	Student Financials → Charges and Payments → UMass Custom(UM) → Zero Out Anticipated Aid(UM)
Daily Reconciliation Report	Student Financials → Charges and Payments → UMass Custom(UM) → Daily Reconciliation (UM)
Charge Reversal	Student Financials → Charges and Payments → Reversals → Reverse Charge
Group Corp Data Entry	Student Financials → Charges and Payments → Group Processing → Create Group Corp Data Entries
Group Data Entry	Student Financials → Charges and Payments → Group Processing → Create Group Data Entries
Correct Transactions	Student Financials → Charges and Payments → Group Processing → Correct Transactions
Payment Reversal	Student Financials → Charges and Payments → Reversals → Reverse Payment
Student Post	Student Financials → Charges and Payments → Post Student Transaction
Student Writeoff	Student Financials → Collections → Write Offs → Post Student Write Off

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General Page Navigation

Student Financials	
Page	**New Path**
Writeoff Reversal	Student Financials → Collections → Write Offs → Reverse Student Write-off
Review Student by Date	Student Financials → Refunds → Review Student by Date
Review Student by ID	Student Financials → Refunds → Review Student by ID
Create Refunds	Student Financials → Refunds → Process Batch Refunds → Create Refunds
Report Batch Messages	Student Financials → Refunds → Process Batch Refunds → Report Batch Messages
Report Batch Refunds	Student Financials → Refunds → Process Batch Refunds → Report Batch Refunds
Completed Refunds by Date	Student Financials → Refunds → Reports → Completed Refunds by Date
Refunds by Date	Student Financials → Refunds → Reports → Refunds by Date
Designate Individual Sponsor	Student Financials → Refunds → Designate Sponsor
Refund with Extra Amount	Student Financials → Refunds → Refund with Extra Amount
Student Refunds By Date	Student Financials → Refunds → Reverse and Cancel Refunds → Student Refunds by Date
Student Refunds by ID	Student Financials → Refunds → Reverse and Cancel Refunds → Student Refunds by ID
Student Refund	Student Financials → Refunds → Student Refund
1098T- Information (2006)	Student Financials → Taxes → UMass Custom(UM) → 1098T- Information (2006)
1098T- Information (2007)	Student Financials → Taxes → UMass Custom(UM) → 1098T- Information (2007)
1098T- Information (2008)	Student Financials → Taxes - UMass Custom(UM) → 1098T- Information (2008)
Load Anticipated Aid	Student Financials → Charges and Payments → UMass Custom(UM) → AMS/TMS Processing → Load Anticipated Aid