

How to View Account Details

Training Description:

This page will show you an itemized accounting of charges, payments, financial aid disbursements and refunds.

- Select “Account Details” from the Dashboard Menu under “Financials”

The screenshot displays the CSU, Chico student account portal. The sidebar menu on the left has 'Account Details' selected under the 'Financials' section. The main content area shows the account for 'Student Sample' with tabs for 'Account Inquiry', 'Account Services', 'Summary', 'Activity', 'Charges Due', 'Payments', and 'Pg'. The 'View by' section allows filtering transactions by date range (From: 08/03/2020, To: 02/03/2021) and 'All Terms'. A callout points to the calendar icons in the date fields, stating: 'to change the default dates, use the calendar icon or key in the changes and click 'go''. Below this is a table of transactions with columns for Posted Date, Item, Term, Charge, Payment, and Refund. A callout points to the table, stating: 'displays charges, adjustments, payments, financial aid and refunds that fit within the date range'. The table lists several transactions, including Univ. Village Rent, General Refund, A S Activity Fee, Consolidated Course Fee, Health Facilities Fee, Health Services Fee, and ID Fee. At the bottom, there is a 'Go to top' link and a disclaimer about fee changes.

Posted Date	Item	Term	Charge	Payment	Refund
11/13/2020	Univ. Village Rent	Fall 2020	-239.21		
11/13/2020	Univ. Village Rent	Fall 2020	1,025.13		
11/13/2020	Univ. Village Rent	Fall 2020	-1,025.13		
11/13/2020	Univ. Village Rent	Fall 2020	239.21		
11/09/2020	General Refund	Fall 2020			28.98
11/07/2020	A S Activity Fee	Spring 2021	71.00		
11/07/2020	Consolidated Course Fee	Spring 2021			
11/07/2020	Health Facilities Fee	Spring 2021			
11/07/2020	Health Services Fee	Spring 2021			
11/07/2020	ID Fee	Spring 2021			

For further assistance contact Student Financial Services at 530-898-5936 or cash@csuchico.edu