Adding and Expiring Deferrals

Adding a Deferral

- **Path:** UC Student Financials > UC Payment Plans > Deferrals

1. Click **Add a New Value**

2. In the **EmplID** field, enter the student’s ID. To select an ID from the Lookup List, click **search icon** to the right of the field. On the Lookup ID page, type the student’s name and then click **LookUp**. A list of IDs is displayed. **Note:** You may need to click **View All** for all IDs to appear.

3. In the **Term** field, enter the current Term. **Note:** Deferments cannot be applied to past terms.

4. Next to the **Item Type** field, click **search icon** to view the applicable Item Types. **Note:** The only options you should use are **Third Party Deferment** or **Deferred Fees**. **DO NOT USE** Grad Payroll Payment Plan.

5. Click **Add**

6. In the **Expiration Date** field, enter the expiration date of the deferment.

7. In the **Deferment Amount** field, enter the amount of the deferment.

8. In the **Deferment Source** field, enter the Third Party name or deferment source.

9. Click **Save**

10. To add an additional deferment **for the same student**, click **+** and repeat steps 6-9 above.
## Expiring a Deferral

**Path:**  
UC Student Financials > UC Payment Plans > Deferrals

1. In the **EmplID** field, enter the student’s ID. To select an ID from the Lookup List, click **Look Up** to the right of the field. On the Lookup ID page, type the student’s name and then click **Look Up**. A list of IDs is displayed.  
**Note:** You may need to click **View All** for all IDs to appear.

2. Click **Look Up**.

3. Change the **Expiration Date** to today’s date.

4. Click **Save**.

5. Navigate to **UC Account Information** to confirm that the deferment has been expired.  
**UC Student Financials > UC Account Information**

6. In the **ID** field, enter the student’s ID. To select an ID from the Lookup List, click **Look Up** to the right of the field. On the Lookup ID page, type the student’s name and then click **Look Up**. A list of IDs is displayed.  
**Note:** You may need to click **View All** for all IDs to appear.

7. Click **Search**.

8. At the bottom of the page, click **Deferrals** to verify this deferment has been expired.

9. Click **Return** to return to the UC Account Information page.