Group Data Entries

Use Group Data Entries when adding charges for a group of students, for example, Study Abroad airfare or health services.

Path: \textit{Student Financials} > \textit{Charges and Payments} > \textit{Group Processing} > \textit{Create Group Data Entries}

1. Click \textit{Add a New Value}

2. Click \textit{Add}

3. From the \textit{Group Type} drop down list, select the appropriate Group Type charge description.

4. In the \textit{Origin ID} field, enter the code if you know it or click \textit{to select the appropriate code.}

5. Leave the \textit{Original Group ID} field blank.

6. Select the Balance Group checkbox.

7. In the \textit{Control Totals} frame, in the \textit{Control Total} field, enter the total \textit{dollar amount of the batch} you will be posting.

8. In the field to the \textit{right of USD}, enter the \textit{number of transactions} you will be entering. Delete the 0 that defaults in.

9. Click \textit{Group Line Entry}

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

11. In the \textit{Account Type} field, click \textit{to select the appropriate Account Description.}

12. Enter the \textit{Item Type} or click \textit{to select the appropriate Item Type.} \textbf{Note:} Your security will limit what you can see on this page. A supervisor of the department must e-mail \texttt{bursar@uconn.edu} to request a security update with your logon name and the name of the charge(s).

13. In the \textit{Amount} field, enter the amount to be charged.

14. In the \textit{Term} field, enter the \textit{Term} code.
<table>
<thead>
<tr>
<th>Step</th>
<th>Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td>15.</td>
<td>In the <strong>Ref Nbr</strong> field, enter the description, for example, parking fine ticket number.</td>
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</tbody>
</table>
| 16.  | In the **Due Date** field, enter the date the charge is due. Add two weeks to today’s date so the student can be notified of the charge via email.  
   **Tip:** Click the ![ calendar ](calendar_icon) to select a date. |
| 17.  | To add another transaction, click ![ plus ](plus_icon). A new row appears with the same data copied from the previous row, except the ID field is blank. |
| 18.  | If all of your data is the same, enter the next student’s **ID**, and then tab out of the field. |
| 19.  | Continue to add rows until you have entered all of your transactions.  
   **Note:** Click ![ minus ](minus_icon) to delete a row if added in error. Click ![ ok ](ok_icon) to select the deleted row. |
| 20.  | When you have added all of the transactions, click ![ save ](save_icon). |
| 21.  | Verify that the **Control Total** field matches the **Entered Total** field and the number of transactions matches. |
| 22.  | At the top of the page, note the **Group ID** number that was assigned to this Group Post when you saved. |
| 23.  | Call or email the Storr’s Bursars Office at Bursar - Tech Staff (in Outlook Exchange Directory) with the **Group ID** number so the transactions can be posted.  
   **Note:** If you wish to save your Group Data Entry but do not want to have it posted yet, from the **Posting Action** drop down list, select **Do Not Post** and then click ![ save ](save_icon). |