Group Data Entries

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

Path:	**Student Financials > Charges and Payments > Group Processing > Create Group Data Entries**

1.	Click Add a New Value
2.	Click Add
3.	From the **Group Type** drop down list, select the appropriate Group Type charge description.
4.	In the **Origin ID** field, enter the code if you know it or click to select the appropriate code.
5.	Leave the **Original Group ID** field blank.
6.	Select the Balance Group checkbox.
7.	In the **Control Totals** frame, in the **Control Total** field, enter the total **dollar amount of the batch** you will be posting.
8.	In the field to the **right of USD**, enter the **number of transactions** you will be entering. Delete the **0** that defaults in.
9.	Click Group Line Entry
10.	In the **ID** field, enter the appropriate ID. To select an ID from the Lookup List, click 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.
11.	In the **Account Type** field, click to select the appropriate **Account Description**.
12.	Enter the **Item Type** or click to select the appropriate **Item Type**. **Note:** Your security will limit what you can see on this page. A supervisor of the department must e-mail bursar@uconn.edu to request a security update with your logon name and the name of the charge(s).
13.	In the **Amount** field, enter the amount to be charged.
14.	In the **Term** field, enter the **Term** code.

15.	In the **Ref Nbr** field, enter the description, for example, parking fine ticket number.
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 31 to select a date.
17.	To add another transaction, click +. 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 − to delete a row if added in error. Click OK.
20.	When you have added all of the transactions, click Save.
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.