

VIEWING YOUR STUDENT'S ACCOUNT AND STATEMENTS

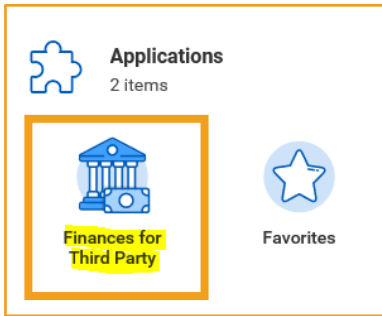
Here's how to:

- View your student's account
- View and print your student's statement

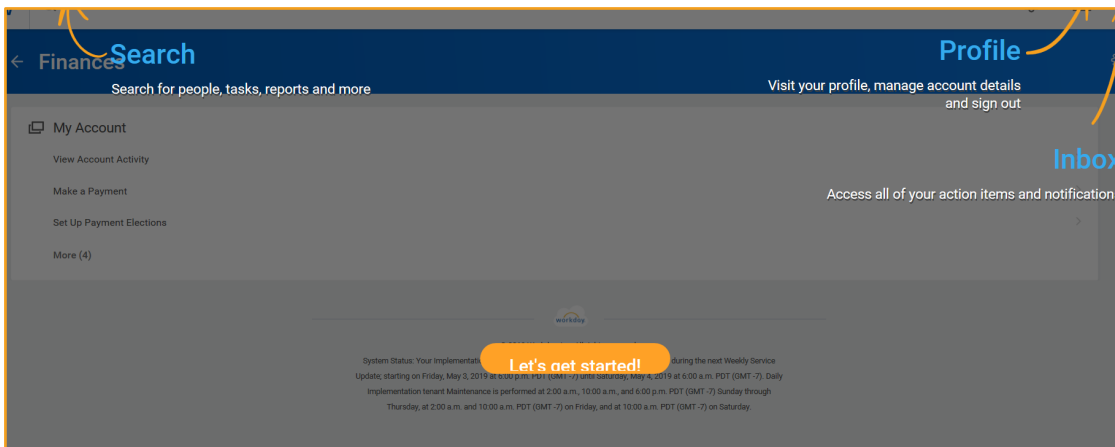
VIEWING YOUR STUDENT'S ACCOUNT

STEP 1

After logging in to Workday, select the **Finances for Third Party** icon.

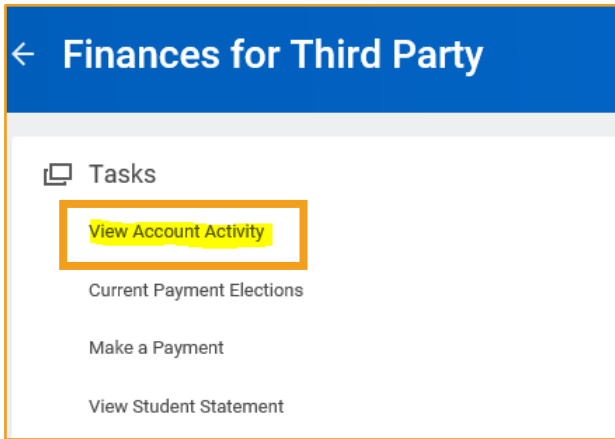


Please note: If you are logging in to this application for the first time, click **Let's Get Started**.



STEP 2

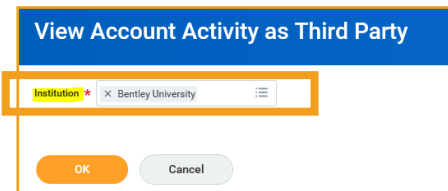
From the menu options in the **Finances for Third Party** section, select **View Account Activity**.



STEP 3

The **View Student Statement as Third party** screen will appear.

- The **Institution** field will automatically populate.
- Click **OK**.

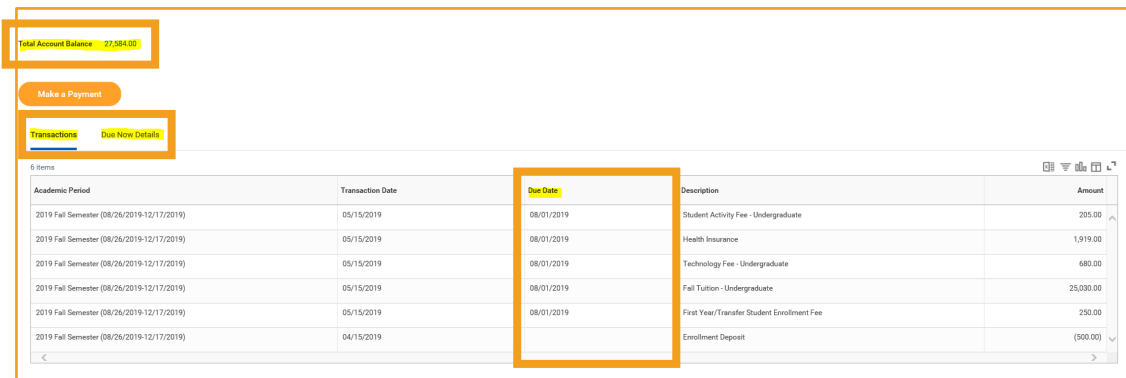


STEP 4

The **View Account Activity** screen provides the following information:

- Total Account Balance
- Transactions
- Due Date
- Ability to Make a Payment

If you are paying via electronic check (e-check), you must first set up **Payment Elections**. Please see the **Setting Up Payment and Refund Elections** job aid for instructions.



DEFINITIONS

Total Account Balance: The total amount owed on your account, regardless of the due date.

Due Now: The sum of your past due and current charges, minus any pending anticipated aid.

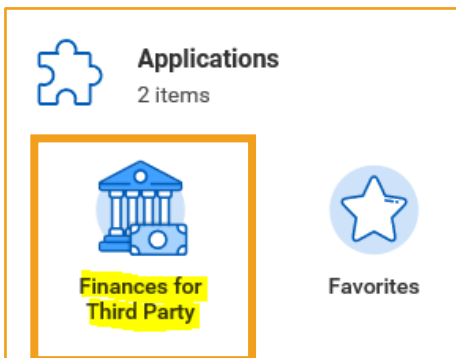
Anticipated Aid: Pending financial aid and/or payments.

Transactions: A list of transactions on your student's account.

VIEWING AND PRINTING YOUR STUDENT'S STATEMENT

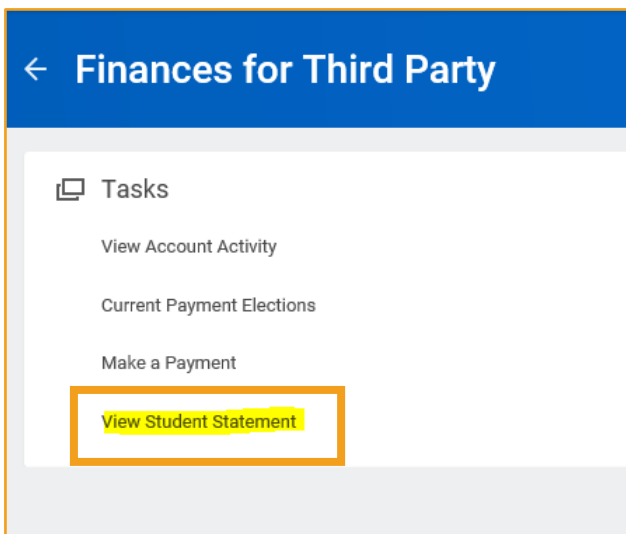
STEP 1

After logging in to Workday, select the **Finances for Third Party** icon.



STEP 2

From the menu options in the **Finances for Third Party** section, select **View Student Statement**.



STEP 3

The **View Student Statement as Third party** screen will appear.

- The **Student** and **Institution** fields will automatically populate.
- In the **Academic Period** field, choose your desired semester.
- Click **OK**.

View Student Statement as Third Party

Student * [Redacted]

Institution * Bentley University

Academic Period * 2019 Fall Semester (08/26/2019-12/17/2019)

OK Cancel

STEP 4

Your student's **Current Statement Balance**, **Charges**, **Payments** and **Credits**, **Anticipated Payments**, and **Refunds** will display. To create and/or print an official billing statement, you can click the **Generate PDF** prompt. Please note: You can also click on the printer icon in the upper right hand corner to capture a screen print, however this is not an official statement of the account.

← View Student Statement as Third Party

Student [Redacted] Student ID [Redacted] Date Range (08/26/2019-12/17/2019)

Academic Period 2019 Fall Semester (08/26/2019-12/17/2019)

Academic Level Undergraduate

Current Statement Balance 27,584.00

Charges 28,084.00

Payments 500.00

Anticipated Payments 0.00

Refunds 0.00

View a Different Statement Generate PDF

Charges 5 items

Date	Charge	Amount
05/15/2019	Student Activity Fee - Undergraduate	205.00
05/15/2019	Health Insurance	1,919.00
05/15/2019	Technology Fee - Undergraduate	680.00
05/15/2019	Fall Tuition - Undergraduate	25,030.00
05/15/2019	First Year/Transfer Student Enrollment Fee	250.00

Payments and Credits 1 item

Date	Payment	Amount
04/15/2019	Enrollment Deposit	500.00

Anticipated Payments 0 items

No Data

Refunds 0 items

No Data

STEP 5

At this point, a screen will appear confirming that a PDF is being generated.

- When the statement is ready to be viewed, a box will appear in the right-hand corner.
- To proceed, click **Student Statement** in the box.
- The PDF version of the statement will appear. To print, click the printer icon in the upper right-hand corner.
- Click **Done**.

