

Placing Charges in SDB

Student Fiscal Services

Contents

This training guide will cover the following:

- > **Accessing SDB**
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SDB Access

To be able to add charges to a student account, you will first need access to Student Account Information in the Student Database (SDB/Keynes). If you do not already have access, you can get set up here:

> <https://studentdata.washington.edu/system-access-forms/>



Setting up Charge Codes

Once you have access to SDB, you will need to have your charge codes set up to be used in SDB. Below is how you can request set up for a new charge code, revise an existing charge code, or request access to use a charge code.

- > **All forms can be accessed on our website at <https://finance.uw.edu/sfs/dept/forms>**
 - **To request access to be able to use a charge code in SDB, use <https://finance.uw.edu/sfs/chargecode-access>**
 - **To request a new Non-Tuition charge code (including fee based tuition charges) use <https://finance.uw.edu/sfs/request-new-sdb-non-tuition-charge-code>**
 - **To request a change of an existing charge code, use <https://finance.uw.edu/sfs/request-revision-non-tuition-charge-code>**
 - **If you know that charge codes have already been established, but you do not know what they are, please email sfstech@uw.edu for more information**

Using and Verifying Charge Codes

To place the charge for the first time, type an “A” in the PROC column, then enter your charge code, the amount of the charge, when the due date will be, and any comment if you need (comment is optional), then hit the hard enter key. The date and description columns will fill automatically.

PROC	DATE	CHARGE	DESCRIPTION	CHARGE \$	DUE/CNCL	COMMENT	BY
-	05/20/19	0620192600	LATE CHANGE	20.00	05/27/19		ACCT RECA
-	05/31/19	0620192600	LATE CHANGE	20.00	06/07/19		ACCT RECA
-	06/19/19	1520193899	BISIA 344A	25.00	07/12/19		ACCT RECA
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SAU210 NON-TUITION CHARGE 22.0001
6/26/19 15:43

PROC: A=ADD, C=CNCL, U=UPDT; COMMENT: 1=IN PERSON, 2=MAIL, 3=FEE STATM, 4=PHONE
 DISPLAY COMPLETED FOR THE REQUESTED STUDENT

2=MENU 6 4=PAY/CHRG 5=AFFIX INQ 6=AFFIX UPD 7=PAYMT ADJ 8=CANCEL CK
 9=REFUND CK 10=CNCL RFND 11=INSURANCE 12=NON-TUIT 13=STATEMENT 14=ACCT SUMM
 15=GSL LOAN 16=STATUS 17=AID CHECK 18=CANCL AID 19=AUTHO AID 20=HOLD AID
 21=STD RESTR 22=PRIOR QTR 25=CSHR SCRN 30=START OVR 31=NEXT PAGE
 DT: 05/01/19 CHRG: _____ AID: _____/_____ STD: _____ ACT: 12



Using and Verifying Charge Codes

If an error has occurred in entering a charge, you can update the charge by typing an “U” in the PROC column where you see the current charge you wish to change, then make any changes you need to the charge and a comment about the correction, then hit the hard enter key. If the original due date has already passed, you will need to enter a new due date for the current date or later.

If an error has occurred and you need to remove the charge entirely, enter a “C” in the PROC column for the charge you wish to remove and hit the hard enter key. If the charge has already been paid and you need to cancel, please contact our office at sfsaid@uw.edu

PROC	DATE	CHARGE	DESCRIPTION	CHARGE \$	DUE/CNCL	COMMENT	BY
	5/20/19	0620192600	LATE CHANGE	20.00	05/27/19		ACCT RECA
	5/31/19	0620192600	LATE CHANGE	20.00	06/07/19		ACCT RECA
	06/19/19	1520193899	BISIA 344A	25.00	07/12/19		ACCT RECA



Using and Verifying Charge Codes

After placing your charges, be sure to verify that they were accepted by reviewing the Payment and Charge Detail screen on M6 4 (SAT630)

The screenshot shows the 'PAYMENT & CHARGE DETAIL' screen for student 1231231. The screen displays account information, a table of charges and credits, and a summary of the total amount due. Annotations with arrows point to various fields and values.

Annotations:

- Total amount due:** Points to the value 11.0001 at the top right.
- DOB:** Points to the date 12/07/20.
- Direct Deposit- if set up ACH would be here:** Points to the 'INFO REL' button.
- SSN:** Points to the value -0092.
- Charges (debits):** Points to the 'CHARGE' column in the table.
- Aid & Payments (credits):** Points to the 'CREDIT' column in the table.
- You can backdate to view past quarter/year charges and credits:** Points to the 'DT:09/02/20' field at the bottom.

Table Data:

DATE	DESCRIPTION	CHARGE	CREDIT	DUE	CANCEL	COMMENT
09/02/20	UG/RES TUIT -13.0	3829.00		10/16/20		20204100
09/22/20	REP ID/PHOTO	25.00		10/16/20		
10/06/20	WEB CHECK		854.00			

Summary: ACCT BALANCE: 3000.00, AFFIXED: 338.00, NOT-AFFIXED: 854.00

Bottom Bar: DT:09/02/20 CHRG: - AID: / STD: 1231231 ACT M6 4

Questions/concerns

If you are entering numerous charge codes and fees in SDB, it is critical that you confirm the entries. If you have questions, please contact:

- sfstech@uw.edu for:
 - > Questions about setting up charge codes or accessing SDB
 - > Assistance with the update of charge codes
- sfsaid@uw.edu for questions about using charge codes that are already set up

