Placing Charges in SDB

Student Fiscal Services

Contents

This training guide will cover the following:

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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:

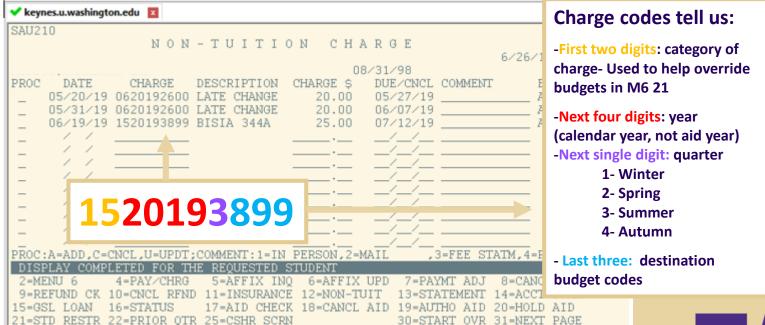> https://studentdata.washington.edu/system-access-forms/

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.
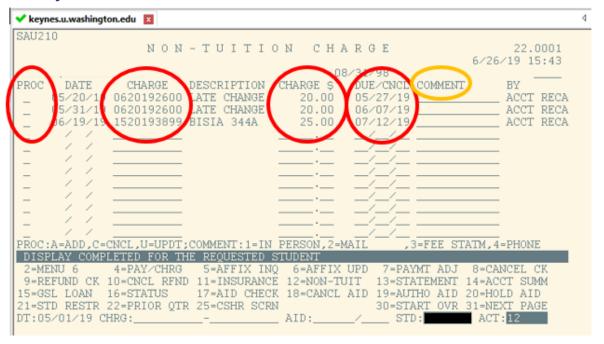
> **All forms can be accessed on our website at https://finance.uw.edu/sfs/dept/forms**
>   – **To request access to be able to use a charge code in SDB, use https://finance.uw.edu/sfs/chargecode-access**
>   – **To request a new Non-Tuition charge code (including fee based tuition charges) use https://finance.uw.edu/sfs/request-new-sdb-non-tuition-charge-code**
>   – **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 your charges on a student account, you will log into SDB, enter the student's ID number and navigate to screen M6 12- the Non-Tuition Charge screen. Charges will follow a specific pattern, where the first 2 digits represent the type of charge, the next 4 are the calendar year the charge is for, the next 1 represents the quarter for the charge, and the last 3 are specific to your destination budget.

Charge codes tell us:

-**First two digits**: category of charge- Used to help override budgets in M6 21

-**Next four digits**: year (calendar year, not aid year)

-**Next single digit:** quarter

      1- Winter

      2- Spring

      3- Summer

      4- Autumn

- **Last three:** destination budget codes

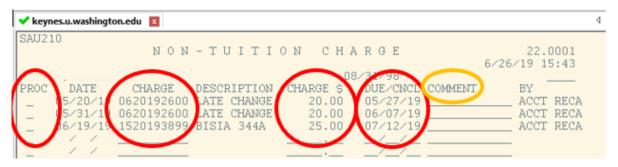1520193899

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.
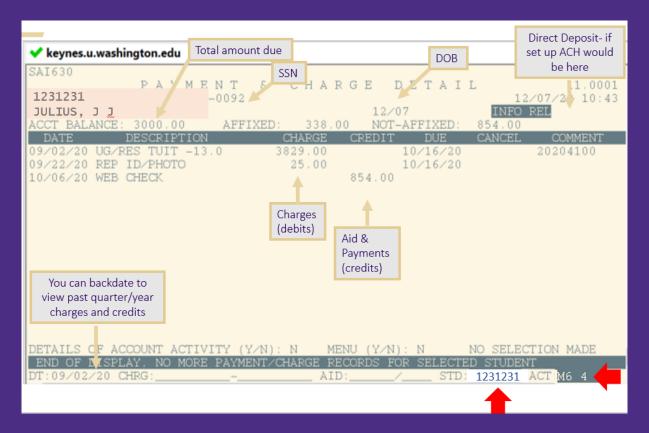
Using and Verifying Charge Codes

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 with 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

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)

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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**

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