Defer Deposits

Remove the Deposit from the Current Term

Access the Payment Reversal search page.

Click on the Search Button. The Payment Reversal page will appear.

In the ID field, enter the student's ID

In the Term field, enter the Term Code for which the payment to be reversed was applied.

Click on the Search Button. The blue box will populate with the payment(s) for the selected student and term.

As necessary, click on the magnifying glass icon to search for the appropriate student.

As necessary, use the search feature to select the Term.

Next to the payment to be reversed, click on the Reverse Button. The Reversal Detail page will appear.

In the Description field, Enter a description for the reversal. For example, “Defer to Future Term.”

In the Reason field, click on the magnifying glass icon to search for the appropriate reason code.

Click on the OK Button. The Payment Reversal page will reappear.

Proceed to Post Payment to Future Term

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Defer Deposits

Post the Payment to the Student’s Future Term

From Remove Deposit from Current Term

Access the Post Student Transaction search page.

Ensure the Business Unit field reflects, “TUFTS.”

In the ID field, enter the student’s ID.

In the Account Type field, enter “STU” for Student Account.

Student Financials > Charges and Payments > Post Student Transaction

As necessary, click on the magnifying glass icon to search for the appropriate student.

In the ID field, enter the student’s ID.

Click on the Add Button. The Student Post page will appear.

In the Amount field, enter the amount of the deposit using whole numbers. Do not enter a dollar sign.

In the Term field, enter the Code for the future Term to which you want to post the deposit.

In the Account Type field, enter “STU” for Student Account.

In the Term field, enter the Code for the future Term to which you want to post the deposit.

As necessary, use the search feature to select the Term.

In the Item Type field, Click on the magnifying glass icon to select the appropriate Item Type.

In the Item Effective Date field, enter the new effective date for the future term in the mm/dd/yyyy format. Use the calendar feature as necessary.

Click on the magnifying glass icon to select the appropriate Item Type.

Note: You may wish to use the Key Word field to narrow the search results.

In the Reference Nbr field, For the reference number for deferred deposits, enter your initials followed by the date. For example, MDS 10/09/2012.

In the Item Effective Date field, enter the new effective date for the future term in the mm/dd/yyyy format. Use the calendar feature as necessary.

Click the Post Button. The Deposit has now been posted to the student’s account for the future term.

End of Processing.

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