

View My Account

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 This job aid will cover how to view account information including the transaction summary and due now details

After logging into Workday, click the Finances icon in the home page.

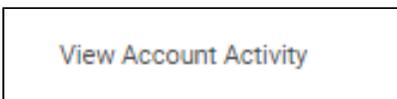


The Finances dashboard provides a quick link to your Account Activity, Make a Payment, Payment Elections, 1098T information and Financial Aid.

Account Activity is under My Account



Select Select View Account Activity



Account Summary

The Account Summary will display your Total Account Balance and Due Now amounts.

Account Summary

Student	Lance Lynn (3000044)
Institution	Lynn University
Total Account Balance	0.00
Due Now	23,711.00

[View Statement](#)

View Statement

Click View Statement to generate and print your statements.

Select the Statement's academic period, click OK

View Statement

Academic Period *

[OK](#) [Cancel](#)

The system will display the statement for that specific academic period. Click Generate PDF to download a statement on PDF.

View Statement			
Student	Lance Lynn (3000044)	Date Range	(08/20/2023-12/31/2023)
Student ID	3000044	Anticipated Due	0.00
Academic Period	2023 Fall	Charges	31,361.00
Academic Level	Undergraduate	Applied Payments	30,000.00
		Unapplied Payments	17,000.00
		Anticipated Payments	0.00
		Refunds	0.00
Institution	Lynn University		
<input type="button" value="Generate PDF"/> <input type="button" value="View a Different Statement"/>			
Charges 9 items			
Date	Charge	Amount	
11/16/2023	Room and Board	6,600.00	
11/16/2023	Tuition Insurance	387.00	
11/16/2023	Student Activities - Undergraduate	500.00	
11/16/2023	Technology	375.00	
11/16/2023	Course Materials	500.00	
11/16/2023	Student Health Insurance	2,124.00	
11/16/2023	Tuition - Undergraduate	19,900.00	

Transaction Summary

The Transaction Summary displays a running list of transactions, charges, payments, and financial aid, in order of transaction date.

Transaction Summary		Due Now Details		
24 items				
Academic Period	Transaction Date	Due Date	Description	Amount
2024 Fall	01/13/2024		Online Payment	(12,711.00)
2024 Spring	01/12/2024		Employee Waiver	(20,600.00)
2024 Spring	01/12/2024	01/12/2024	Student Activities - Undergraduate	500.00
2024 Spring	01/12/2024	01/12/2024	Tuition - Undergraduate Three Year	20,600.00
2024 Spring	01/12/2024	01/12/2024	Technology	375.00
2025 Spring	01/11/2024	01/11/2024	Estimated Tuition - Undergraduate	20,600.00
2024 Spring	01/11/2024	01/11/2024	Room and Board	6,875.00
2024 Fall	01/10/2024	01/10/2024	Estimated Tuition - Undergraduate	0.00

Due Now

The Due Now tab displays Past Due, Current Due, and Anticipated Payments, along with definitions to explain these terms.

Transaction Summary

Due Now Details

Due Now is the amount currently owed. This is the sum of your past due charges and current due charges, minus any anticipated payments. Due Now amount does not include unapplied payments made toward your account that we are still processing.

Past Due Charges 29,711.00

Current Due Charges 0.00

Anticipated Payments 6,000.00

Unapplied Payments 29,711.00

Definitions

Past Due Charges Charges that haven't been paid yet and were due in the past.

Current Due Charges Charges that are due within the next 30 days.

Anticipated Payments Financial aid and sponsor contracts that haven't disbursed to your account yet.

Unapplied Payments Payments made toward your account that haven't been applied to charges yet.