Instructions for New Online Charge to Account Request

1. **Access Online Charge to Account Form**
   b. Login using your MyID credentials.
   c. Click “New Charge to Account Request”. (If this is the first time accessing, you will be taken directly to the form).

2. **Charge to Account Request**
   a. Complete the following information:
      - Departmental contact information
      - Full chartstring to be charged
        - Fund should begin with 2.
        - Project and Activity ID are both required for grants.
      - Student detail
      - RIAS/RIAT Waiver: Yes or No.
        - If yes, verify that the waiver has been entered in Grad Status.
3. Term code

Charge To Account Request

Fields marked with * are required
Fields marked with ** are required for grants

* Name of Contact: 
* Contact Email Address: 
* Contact Phone Number: 
* Department Name: 

Chartstring Information
Account Code: 754190
* Fund:
Program Code: 
* Department ID: 
Class:
Operating Unit: 
** Project ID: 
** Activity ID: 
Chartfield 1: 
PC Business Unit: 

Enter Student Detail:
* Student ID (91x): 
* Student First Name: 
Student Middle Name (optional): 
* Student Last Name: 

* RHAS/RID: Select One 
Term Code: Fall 2021 

Entry can be saved prior to submission in case all required info is not available at the time.

Save Request and Exit Continue to Fee Information

For any questions, please call 706-542-2965 or email stdarec@uga.edu

b. When complete, click “Continue to Fee Information”.
   ▪ If your request is not complete, click “Save Request and Exit”. This will allow you to return to your pending request in the future.

3. Fee Information
   a. Modify amounts in the “Write in Amount” column to be the amounts covered by the Charge to Account if different from the default amounts. Tuition, Health Insurance, Housing, Food Services, and Program Fees are never defaulted. These amounts must be entered in the “Write in Amount” column. Additionally, if
you are not going to cover one of the defaulted amounts for student fees, you will need to change the amount to 0.00 in the “Write in Amount” column.

- Verify student’s charges on TSICSRV in Banner.

b. After updating the “Write in Amount” column, click “Recalculate Student Total”.

c. Select Yes or No if you have more than one student using the same chartstring.
   - If Yes, continue entering and submitting students’ information.
d. After entering all students, click “Submit Charge to Account Request”. You will receive an email summarizing your requests.

- If your request is not complete, click “Save Request and Exit”. This will allow you to return to your pending request in the future.

4. Main Menu

a. Requests Started Not Submitted
- Requests can be saved and not submitted if all information is not available. Your saved requests can be accessed under this heading when you’re ready to complete them.

b. Submitted
   - All completed and submitted forms will be available here and the creator will be emailed once the form has been submitted to Student Account Services.

c. Completed
   - Once the form has been approved by Student Account Services, it will be moved to this menu and the creator will receive an email that the form has been approved.

d. Returned for Corrections
   - If there are errors with the form, Student Account Services will return with an opportunity to correct. The creator will be notified and once changes are made and resubmitted, the form will move to the Submitted menu.

e. Deleted by Reviewer
   - If Student Account Services cannot approve the form, and corrections cannot be made, it will be deleted and the creator will be emailed.

5. Final Steps
   a. After submitting the request(s), you will receive an email indicating the request has been forwarded to Student Account Services for approval.
   b. If the request is approved, you will receive an email confirming the approval.
      - Student Account Services will enter the approved Charge to Account into Banner within 2-3 business days.
c. If the request is not approved, you will receive an email indicating the issues with the request. You will log into the Charge to Account Request System and click on the “Returned for Corrections” tab and click on the request. At this point, you will be able to correct any errors preventing approval and resubmit beginning the approval process over.