
Reversing Group Charges

Use this instruction guide to reverse charges for a group students, where the transaction was enter using the Group Post process. To complete this task, you must attend PST310 Student Financials and have the security roles:

- UF_SF_UPDATE_CHARGES – Permits entering and modifying charges
- UF_SF_PP_XXXXXXX - Defines your scope of authority where XXXXXXX = your department/unit

You must complete these steps to completely reverse the transaction:

1. Reverse the group charge
2. Find the Group ID of the reversal
3. Post the reversal

Follow these instructions to learn how to reverse and post a previously posted group transaction.

1. Login to **myUFL**
 - Click the Login button Open an internet browser
 - Navigate to my.ufl.edu
 - Click the Access myUFL button
 - Enter your GatorLink username and password
 - Click the Login button
2. Navigate to **Student Financials > Charges and Payments > Group Processing > Reverse Groups**
3. Enter your **Run Control ID** - You can run this process by searching for an existing Run Control ID or you can add a new value
 - If you do not have one, you can create one:
 - Click the **Add a New Value** tab
 - Enter the desired information into the **Run Control ID** field
 - Enter an ID that is relevant to the process. This may help you remember it for future use
 - Click the **Add** button

A **Run Control ID** is an identifier that, when paired with your User ID, uniquely identifies the process you are running. The Run Control ID defines parameters that are used when a process is run. This ensures that when a process runs in the background, the system does not prompt you for additional values.

Use the Group Reversal page to reverse groups of transactions

4. Enter the last few digits of the **Group ID** you want to reverse in the **Group ID** field
 - There are 15 digits in the Group ID number
 - Use the **Find a Group ID** instruction guide if you need to identify with Group ID to enter
5. Click the **Lookup** button and select the Group ID from the list
6. Click in the **Description** field and enter a brief description of the reversal
7. Click in the **Item Effective Date** field and enter the appropriate date
8. Click the **Run** button
9. Click the **OK** button

Find the GROUP ID of the REVERSAL

After running the process, you can check to see that the group charges were reversed

1. Click the **Review Transactions** link
2. Enter your **UFID** into the **User ID** field
3. Enter date of the **REVERSAL** into the date field
4. Click the **Search** button

POSTING THE REVERSAL TRANSACTION

Next, you will post the transaction(s)

1. Click the **Post Transactions** link
2. Search for your **Run Control ID**
 - View all your Run Control IDs by simply clicking the Search button

Use the Post Transactions page to run the Group Post process

1. In the **Group Type** field, enter **C** or click the look up button and select **Charge**
2. Click in the **Starting Group ID** field and enter the **Group ID** the system created for the **REVERSAL**
3. Click the lookup button to view a list. Note you can search by UFID
4. Use the **Find a Group ID** instruction guide if you need to identify with Group ID to enter
5. Click the **Run** button to access the Process Scheduler Request page
6. Click the checkbox next to **Group Posting Process** (SFPGRPST) to select it
7. Click the **OK** button

Review the transaction

1. Click the **Review Transactions** link
2. Enter the appropriate ID into the **Group ID** field
3. Click the **Search** button

For Further Assistance

- Review the myUFL Toolkit for Student Financials at the Human Resource Services website
 - Navigate to hr.ufl.edu and select: Training > myUFL Toolkits > Student Financials
 - Click here: <http://www.hr.ufl.edu/training/myUFL/toolkits/StudentFinancials.asp>
- Contact the UF Help Desk at helpdesk@ufl.edu or call them at (352)392-HELP