In this Job Aid, we will cover the processes for reviewing customer accounts and taxing pages, in addition to creating exemptions.

- You will first need to login to Campus Solutions at \texttt{student.msu.edu}.

### Reviewing Customer Accounts

**Navigation:** NavBar > Student Financials > View Customer Accounts

1. Search for the student by entering either their ID, first name, or last name, then click **Search**.
2. You will be taken to the View Customer Accounts page.

- In the example above, an international student (note the Recalculate Intl Taxes button) was selected showing a negative balance of -$1,000. The Recalculate Intl Taxes button will only be visible for students that have a credit on their account. This button will be covered shortly.
- Click the Account Details link to see a detailed look of the noted balance.

3. The Account Details page will pop-up.

- In the example above, the student received $16,000 in aid (recorded as -16,000), with their freshmen year tuition costing $15,000.
- The remaining difference is $1,000 of aid (recorded as -1,000), which is now taxable.
Click **Return** in the bottom left of the page to close out of the **Account Details** screen and be taken back to the **View Customer Accounts**.

3. Once back on the **View Customer Accounts** page, click the **Recalculate Intl Taxes** button, if applicable.

- This button will calculate the taxes and post them to the student’s account.
- In the example above, after the international taxes were calculated, the **Recalculate Intl Taxes** button disappears, and a new balance is displayed (-657.50).
- As noted earlier, clicking the **Account Details** button will bring up details of the noted cost, including the newly calculated state and federal taxes.
Reviewing Taxing Pages

This section will cover how to navigate to the taxing pages, which contain more details and allow for overrides.

**Navigation:** NavBar > Student Financials > Taxes > MSU 1042-S > MSU 1042-S Data

1. Search for the student by entering either their ID, first name, or last name, then click **Search**.
2. You will be taken to the **MSU 1042-S Data** page.

- In the example above, the taxes that were previously calculated are displayed in the **Fed Tax/Fed 2 Tax/State Tax** slots.
- You have the option to override the tax by checking the box next to **Overridden**, then clicking **Set Override**, which will then change to read "**Remove Override**," should that option be needed later.
- You may also recalculate taxes from this page if the **Recalculate Intl Taxes** button mentioned in the previous section was not available by clicking the **Recalculate** button after changing the tax values.
Creating Exemptions

If a student is no longer eligible to be taxed, you can set up an exemption for the correlating tax year.

**Navigation:** NavBar > Student Financials > Taxes > MSU 1042-S > MSU 1042-S Exemptions

1. Click the Add a New Value tab, then enter the student’s ID and the tax year you would like to make an exemption for. Click Add.
2. You will be taken to the **MSU 1042-S Exemptions** page.
   - You will first need to select the **Exemption Type**, which can be either be 04 Tax Treaty Exemption, 05 Substantial Presence Exempt or Special Exemption.
     - 04 Tax Treaty Exemption
     - 05 Substantial Presence Exempt
     - Special Exemption
   - Enter the start (from) and end (to) dates for the exemption, the **Exemption Doc**, which can either be MSU Intl Tax Questionnaire, W-8 BEN or W9, enter the **Exemption Code Expiration Date**.

3. At this point, you can finish the process and click **Save**; any changes made on this page will be reflected on the **View Customer Accounts** page covered in the first section of this training. When you have pulled the student up, you will need to click the **Recalculate Intl Taxes** button for the changes to be carried over.

4. Select the **Visa Permit Data** button to view the student’s visa status and type, which determines the rate at which they are taxed.
   - The **Visa/Permit and POE Data** page (normally found in the Campus Community section of Campus Solutions) will populate, displaying that information.
     - Alternative navigation: NavBar > Campus Community > Personal Information > Identification > Citizenship > Visa Permit Data