Billing, Waivers, Financial Aid and More

James Gaeta
Associate Dean of Enrollment Services

Loretta Waclawczyk
Assistant Controller

Susan Moore
Accounts Receivable Specialist II
Session Overview

- Accessing Info Online
- Financial Aid – Next Steps
- Renewing Financial Aid
- Parent Access to Student Information
- Billing, Payment and Insurance
Financial Aid Self Service

- Allows user to view status of financial aid
- View list of documents received/needed
- Accept/Decline/Change loans
- Report outside scholarships
- Print hard copy of financial aid letter
- Proxy access to parents, other persons
- Navigation/FAQ’s can be found on Financial Aid page
Education for Tomorrow — Creating the 21st century thinker.
SOUTHWESTERN UNIVERSITY

Scholarships & Financial Aid

At Southwestern, we're committed to ensuring that students from all income levels who wish to pursue their education with us have access to a variety of financial opportunities.
Education for Tomorrow — Creating the 21st century thinker.
A Future Full of Promise
Southwestern University announces its 2021-2026 Tactical Plan.

Two Seniors Receive Fulbright Awards for 2022-2023
Catherine Hiebel ’22 and Merine Bostris ’22 will teach English in Spain and Austria, respectively.

Watch: Highlights from Commencement Convocation 2022

Southwestern University Named a Best Value College for 2022 by The Princeton Review
SU is one of 209 schools chosen for this list.

G.H.O.S.T. Unit Takes Theater to New Dimensions at Southwestern
What happens when you start a devised theater project with three Southwestern University students and the Anton Chekhov play, The Cherry Orchard? You end up with a nationally recognized production called G.H.O.S.T. Unit: The Live Event.

Southwestern University Announces Cassandra M. McZeal ’92 as 2022 Commencement Speaker
The applied mathematician and Southwestern alumna will address the graduating class.
Student’s Self Service Account

Hello, Welcome to Colleague Self-Service!
Choose a category to get started.

Notifications

- **Documents Required**: There are 4 requests from your institution that require your action. [View required documents]

**Student Finance**
Here you can view your latest statement and make a payment online.

**Financial Aid**
Here you can access financial aid data, forms, etc.

**Tax Information**
Here you can change your consent for e-delivery of tax information.

**Banking Information**
Here you can view and update your banking information. Direct deposit information entered here is only for accounts payable payments (reimbursements, refunds, etc.). For payroll direct deposit changes, please contact Loretta Waclawczyk at waclaw@ southwestern.edu.

**Employee**
Here you can view your tax form consents, earnings statements, banking information, timecards and leave balances.

**Student Planning**
Here you can search for courses, plan your terms, and schedule & register your course sections.

**Course Catalog**
Here you can view and search the course catalog.

**Student Attendance**
Here you can view your leave by term.

**Graduation Overview**
Here you can view and submit a graduation application.

**Academic Attendance**
Here you can view your attendance by term.
Welcome to Financial Aid!
Use Collague Self-Service Financial Aid to assist in managing your Financial Aid package from submission to completion.

Notifications

Select an Award Year: 2023-24 Academic Year

You have missing documents!
In order to complete your financial aid application some additional documentation is required before the Financial Aid office can evaluate your information.
Complete required documents

Checklist

- Completed Submit a Free Application for Federal Student Aid (FAFSA)
- Action Needed Complete required documents
- Not Available Your application is being reviewed by the Financial Aid Office
- Not Available Review and accept your Financial Aid Award Package
- Not Available Complete Direct Loan Entrance Counseling

Resources

Helpful Links
- Sub/Unsub Master Prom Note
- FAFSA Application
- PLUS Loan Application
- NSLDS Information
You have missing documents!

In order to complete your financial aid application, some additional documentation is required before the Financial Aid office can evaluate your information.

Complete required documents:

Checklist:
- Completed: Submit a Free Application for Federal Student Aid (FAFSA)
- Action Needed: Complete required documents
- Action Needed: Review and accept your Financial Aid Award Package

Resources:
- Helpful Links:
  - Sub/Unsub Master Prom Note
  - FAFSA Application
  - PLUS Loan Application
Required Financial Aid Documents

Be sure to submit ALL required documents before their due date to make sure your Financial Aid package is not delayed.

Select an Award Year: 2023-24 Academic Year

Document | Explanation | Due Date | Status | Attachments
--- | --- | --- | --- | ---
Texas Residency Form | The Texas Residency Form must be submitted by students who are receiving any state aid, including, but not limited to a Tuition... more |  |  |
You have missing documents!

In order to complete your financial aid application some additional documentation is required before the Financial Aid office can evaluate your information.

Complete required documents

Checklist

- [ ] Completed Submit a Free Application for Federal Student Aid (FAFSA)
- [ ] Action Needed Complete required documents
- [ ] Not Available Your application is being reviewed by the Financial Aid Office
- [ ] Not Available Review and accept your Financial Aid Award Package

Resources

Helpful Links

- Sub/Unsub Master Prom Note
- FAFSA Application
- PLUS Loan Application
# My Awards

You can accept or decline awards, and update your loan amounts.

## Notifications

- [View award](#)

**Select an Award Year:** 2022-23 Academic Year

- [Contact Financial Aid Office](#)

## You have the following Awards

Your award package assumes you will be enrolled full-time. If you enroll less than full-time, the financial aid you actually receive may be less than what is stated here. Please contact your Financial Aid counselor if you have questions about your enrollment status.

<table>
<thead>
<tr>
<th>Award</th>
<th>Status</th>
<th>Total Awarded Amount</th>
<th>Fall 2022</th>
<th>Spring 2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scholarships and Grants</td>
<td>$34,590.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mood Scholar Award</td>
<td>Accepted</td>
<td>$26,000.00</td>
<td>$13,000.00</td>
<td>$13,000.00</td>
</tr>
<tr>
<td>Tuition Equalization Grant</td>
<td>Pending Acceptance</td>
<td>$3,497.00</td>
<td>$1,749.00</td>
<td>$1,749.00</td>
</tr>
<tr>
<td>William Randolph Hearst Scholarship</td>
<td>Pending Acceptance</td>
<td>$2,811.00</td>
<td>$1,306.00</td>
<td>$1,306.00</td>
</tr>
<tr>
<td>William &amp; Abbie Allen Scholarship</td>
<td>Accepted</td>
<td>$2,082.00</td>
<td>$1,041.00</td>
<td>$1,041.00</td>
</tr>
<tr>
<td>Loans</td>
<td>$29,560.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Award</td>
<td>Status</td>
<td>Total Awarded Amount</td>
<td>Fall 2022</td>
<td>Spring 2023</td>
</tr>
<tr>
<td>-----------------------------------------------------</td>
<td>---------------</td>
<td>----------------------</td>
<td>-----------</td>
<td>-------------</td>
</tr>
<tr>
<td>Mood Scholar Award</td>
<td>Accepted</td>
<td>$26,000.00</td>
<td>$13,000.00</td>
<td>$13,000.00</td>
</tr>
<tr>
<td>Tuition Equalization Grant</td>
<td>Pending Acceptance</td>
<td>$3,497.00</td>
<td>$1,749.00</td>
<td>$1,748.00</td>
</tr>
<tr>
<td>Randolph Hearst Scholarship</td>
<td>Pending Acceptance</td>
<td>$2,611.00</td>
<td>$1,306.00</td>
<td>$1,305.00</td>
</tr>
<tr>
<td>William &amp; Abbie Allen Scholarship</td>
<td>Accepted</td>
<td>$2,082.00</td>
<td>$1,041.00</td>
<td>$1,041.00</td>
</tr>
</tbody>
</table>

**Total Awards**

<table>
<thead>
<tr>
<th>Total Awarded Amount</th>
<th>Fall 2022</th>
<th>Spring 2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>$63,750.00</td>
<td>$31,876.00</td>
<td>$31,874.00</td>
</tr>
</tbody>
</table>

**Loan Requirements Checklist**

- Incomplete: Complete Direct Loan Entrance Counseling
- Incomplete: Sign Direct Loan Master Promissory Note
Financial Aid – Next Steps

**Disbursement Dates**
- Fall: August 18, 2023
- Spring: January 8, 2024

**Merit Scholarships**
- No additional steps needed

**Verification**
- List of required documents available on Self Service
- Priority deadline: June 15, 2023, but documents still accepted
- Must be completed before funds can be disbursed
Financial Aid – Next Steps

**Tuition Equalization Grant**
- Texas Residency Form - due June 26, 2023
- Form available on:
  - Self Service
  - Financial Aid website:
    - *Important Dates, Policies and Forms* → Texas Residency Form
- Upload completed form through Self Service

**Pell Grant, Supplemental Grant, Southwestern Grant**
- No additional steps needed, except for those selected for verification
Financial Aid – Next Steps

**Thank you notes**
- Thank You note request email sent from April Hampton Perez (pereza@southwestern.edu)
- For named scholarships/grants from SU
- Due date June 26, 2023

**Truman J. Odiorne Scholarship**
- Odiorne residency form
- Thank-you note
- Due date June 26, 2023
Financial Aid – Next Steps

Accept, change, or decline loans
- Use Self Service to do this, go to My Awards, select the loan
- Accepting loans only indicates that you plan to use them
- Two more steps needed to complete loans (next slide)
- Only accepted loans will appear on billing statement
- Any changes to loan amounts will be reviewed

Complete by June 26, 2023
Financial Aid – Next Steps

**Direct Loans (Subsidized and Unsubsidized)**
- Entrance Counseling
- Master Promissory Note
- Complete both at www.studentaid.gov

**Direct PLUS Loan**
- PLUS loan application
- Master Promissory Note
- Complete both at www.studentaid.gov

Complete by Jun 26, 2023
Financial Aid – Next Steps

**Private Loans**
- Contact Lender for application information
- Private loan lender list available on Financial Aid Website
- Complete by June 26, 2023

**Outside Scholarships**
- Outside scholarships must be reported
- Required even if funds are sent directly to student
- Go to “Report/View Outside Awards” in Self Service to report these
- Complete by June 26, 2023
Renewing Financial Aid

Satisfactory Academic Progress

- Applies to all financial aid (scholarships/grants/loans)
- 2.0 or higher cumulative GPA
- Complete 80% or more of all credits attempted
- Attempt no more than 175 credits
- Programs with additional requirements
  - Brown Scholarship: 3.5 cumulative GPA
  - Sarofim Scholar Awards/Fine Arts Performance Awards
  - TEG: 2.5 cumulative GPA/24 credits in AY/75% comp rate in AY
Renewing Financial Aid

File FAFSA each year
- Required for renewing most financial aid, including loans
- FAFSA available in December 2023
- Due March 1 of each year
- Merit scholarship only: FAFSA not required
- Contact Financial Aid Office to discuss significant changes in family financial circumstances from year to year.
FERPA and Proxy Access in Self-Service

FERPA:
Student must indicate with whom SU may discuss private financial and/or academic information

Proxy Access:
• Allows view-only access to Financial Aid information
• May be granted to parents or other persons
• Student must grant access
• Individuals granted access has own login credentials
• Instructions on the Self-Service Information page
Hello, Welcome to Colleague Self-Service!

Choose a category to get started.

- **Student Finance**
  Here you can view your latest statement and make a payment online.

- **Tax Information**
  Here you can change your consent for e-delivery of tax information.

- **Employee**
  Here you can view your tax form consents, earnings statements, banking information, timecards and leave balances.

- **Course Catalog**
  Here you can view and search the course catalog.

- **Graduation Overview**
  Here you can view and submit a graduation application.

- **Advising**
  Here you can access your advisees and provide guidance & feedback on their academic planning.
Hello, Welcome to Colleague Self-Service!
Choose a category to get started.

View/Add Proxy Access

All proxies must first be listed as a relation to the student and have a valid email address to be granted access. If you do not see the person you want to add as a proxy, please send an email to aso@southwestern.edu. Include the individual's full first and last names, their mailing address, email address, phone number, and relationship to you (e.g., parent/step-parent/guardian, etc.). It may take up to 48 hours to update the system.

This is for proxy access to the student's financial aid, grades and/or notifications only. To set up proxy access to view e-bill, make on-line payments and/or set up a payment plan access please go to your CashNet Payment Portal. Directions on accessing and setting up your a parent pin for the Payment Portal, see Business Office/Student Accounts Information on the So website.

Active Proxies

You do not have any designated proxies. Add one now to allow another self-service user to view or edit your account.

Add a Proxy

I understand that anyone I add as a proxy will be able to see any information on the pages for which I provide access. This proxy access may take up to one hour after assignment to be available to the proxy. I also authorize University personnel to discuss the details of my student account and financial aid with my proxy. I understand that I can remove proxy access to a relation at any time through Self-Service.

Select a Proxy
Please Select

Required Documents

Advising
Here you can access your advisees and provide guidance & feedback on their academic planning.

Required Agreements
Self Service/Proxy Access Issues

Once student grants proxy access, email will be sent to the proxy’s email address.

Email will come from registrar@southwestern.edu.

Be sure email is not blocked or sent to spam folder.

Contact helpdesk@southwestern.edu with any issues.
Financial Aid Appointments

- Counselors available to meet with families
- Appointments available 1:00 pm – 4:30 pm tomorrow
- Link to make appointment sent to SU email account
Billing Information
Southwestern University

Becoming a Student
- Current Students
Parents & Family
Faculty & Staff
Alumni

ABOUT SOUTHWESTERN
ATHLETICS
CALENDAR
DIRECTO
FINE ARTS
GIVING
LIBRARY & IT
NEWS

BILLING & PAYMENTS

Southwestern University announces its 2021-2026 Tactical Plan.

A Future Full of Promise

Southwestern University announces its 2021-2026 Tactical Plan.

G.H.O.S.T. Unit Takes Theater to New Dimensions at Southwestern

What happens when you start a devised theater project with three Southwestern University students and the Anton Chekhov play, The Cherry Orchard?! You end up with a nationally recognized production called G.H.O.S.T. Unit: The Live Event.

Southwestern University Announces Cassandra M. McZeal ‘92 as 2022 Commencement Speaker

The applied mathematician and Southwestern alumna will address the graduating class.

Southwestern Students Receive Gilman International Scholarship to Study Abroad

Sierra Burton ’22 and Suleman Khan ’25 will use scholarship money to study in Europe and Japan.

Scholarship, Service, and Sisterhood

The Upsilon Alpha chapter of Alpha Kappa Alpha, Incorporated®, continues the rich legacy of the nation’s first historically Black sorority.

Southwestern University Receives STARS Gold Rating for Sustainability Achievements

STARS, the Sustainability Tracking, Assessment & Rating System measures and encourages sustainability in all aspects of higher education.

SU has Earned 2021 Distinction Through the Tree Campus Higher Education Program for the Fifth Year in a Row

Southwestern University shows a dedication to including green spaces on campus as they have proven to benefit students.
### Sprog Billing Information Presentation - June 2022

#### 2023-2024 Key Financial Dates and Deadlines

#### Billing Schedule & Due Dates

<table>
<thead>
<tr>
<th>SEMESTER</th>
<th>E-BILL AVAILABILITY DATES</th>
<th>PAYMENT DUE DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer 2023</td>
<td>E-Bills released April 19, 2023</td>
<td>May 5, 2023</td>
</tr>
<tr>
<td>Fall 2023</td>
<td>Returning Students E-bills - April 25, 2023</td>
<td>July 14, 2023</td>
</tr>
<tr>
<td></td>
<td>Returning Students Reminder E-bills June 30, 2023</td>
<td></td>
</tr>
<tr>
<td></td>
<td>New Students - E-Bill received after registration</td>
<td></td>
</tr>
<tr>
<td>Spring 2024</td>
<td>E-bills released Nov. 10, 2023</td>
<td>Dec. 8, 2023</td>
</tr>
</tbody>
</table>
## Fall 2023 Dates

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>At Sprog</td>
<td>Register for classes.</td>
</tr>
<tr>
<td>6/30/23</td>
<td>Fall 2023 E-bills Released in Transact Payments Portal.</td>
</tr>
<tr>
<td>7/13/23</td>
<td>All waivers due.</td>
</tr>
<tr>
<td>7/14/23</td>
<td>Fall 2023 Tuition Due or Enroll in Payment Plan.</td>
</tr>
<tr>
<td>7/24/23</td>
<td>$100 Late Fee Assessed on Unpaid Balances.</td>
</tr>
<tr>
<td>Fall Move In</td>
<td>Balance must be paid or student is not allowed to move in &amp; classes may be cancelled.</td>
</tr>
</tbody>
</table>
# Spring 2024 Dates

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/10/23</td>
<td>Spring 2024 E-Bills Released in Transact Payments Portal.</td>
</tr>
<tr>
<td>12/07/23</td>
<td>Spring 2024 Vehicle Waiver Due.</td>
</tr>
<tr>
<td>12/08/23</td>
<td>Spring 2024 Tuition Due or Enroll in Payment Plan.</td>
</tr>
<tr>
<td>12/18/23</td>
<td>$100 Late Fee Assessed on Unpaid Balances.</td>
</tr>
<tr>
<td>1/10/24</td>
<td>Students with unpaid Spring Balances must move out of housing &amp; Spring classes will be cancelled.</td>
</tr>
</tbody>
</table>
Payment Options

Online via Transact Payments Portal
- Credit Cards – 2.75% processing fee (VISA, MasterCard, Discover, and American Express)
- Electronic Check/ACH - no fee at this time
- SU Payment Plan - $25 enrollment fee
- International Payments – fees vary

By Mail
- Check, money order, or cashier’s check

In Person at Business Office
- Cash, check, money order or cashier’s check
Student’s Self Service Account

Hello, Welcome to Colleague Self-Service!
Choose a category to get started.

Notifications

<table>
<thead>
<tr>
<th>Title</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>There are 4 requests from your institution that require your action.</td>
</tr>
</tbody>
</table>

View E-Bill and Make a payment

Student Finance
Here you can view your latest statement and make a payment online.

Financial Aid
Here you can access financial aid data, forms, etc.

Tax Information
Here you can change your consent for e-delivery of tax information.

Banking Information
Here you can view and update your banking information payable payments (reimbursements, refunds, etc). For information, contact brookss@southwestern.edu.
Continue To Access Transact Payments Portal

View E-Bill and Make a Payment

Click on the link below to be connected to Transact Payments to access your Southwestern University student account information to do the following:

- View your Electronic Statements (E-bills)
- View your account balance by term & make an ACH or Credit Card payment
- Make an International payment
- Enroll in a monthly Payment Plan
- View your recent payments made on-line
- Set-up & manage Parent or Authorized user PINs
- Manage any saved ACH or credit card payment methods

In order for your parent or other designated person to be able to access your student account information, you must first send a payer invitation to the individual by going to the “My Account” section in the top left corner of the next page & completing the invitation process. Once you have completed the set-up process, the authorized individual will be sent an email with their ID, temporary password, and the necessary link to access your account. Authorized users will only have access to E-bills, to see account balance and payment history, to make payments on the account, and to set up their own email and text notifications. They do not have access to financial aid, grades, or other online student information.

Continue to Student Account Information

Wire Transfers via Convera GlobalPay

- International payments can be made in Transact Payments using the link above.
- Those wishing to make payments to the student account via wire transfer or international electronic transfer using Convera GlobalPay should select the following link: Convera GlobalPay
Transact Payments Portal
Need to enroll in a payment plan? Enrolling in a payment plan takes just a few minutes and can help you spread out payments on your education expenses.

View payment plan options

Recent transactions

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Receipt</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>4/10/23</td>
<td>23SP: 23 Spring Special Payment Plan A</td>
<td>#87017</td>
<td>$1,063.59</td>
</tr>
<tr>
<td>3/10/23</td>
<td>23SP: 23 Spring Special Payment Plan A</td>
<td>#86515</td>
<td>$1,063.58</td>
</tr>
</tbody>
</table>
Student must “Send a payer invitation” in order to allow parents or other authorized users access to the Transact Payments Portal. This is separate from Self Service Proxy.
After the student sends the invitation, the “Payer” will receive an email with log on information and a link to the Payer Transact Payments Portal.
Parents must use the following web address to make payments online at: https://commerce.cashnet.com/swupay
If you have more than one student currently enrolled, parents can link the accounts together. Each student needs to invite the payer. When you have successfully logged in to one student, you should see the “View a different student link.”
Current student

SM  Student Name

View

Link to another student at Southwestern University

You'll be able to easily switch between students without having to sign out and sign back in.

Link to another student
You will login with the information for your other student. Can use temporary password if you were just invited.
Viewing E-Bills/Statements
## Statements

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>5/3/23</td>
<td>SWU Bill</td>
</tr>
<tr>
<td>4/24/23</td>
<td>SWU Bill</td>
</tr>
<tr>
<td>1/17/23</td>
<td>SWU Bill</td>
</tr>
<tr>
<td>12/1/22</td>
<td>SWU Bill</td>
</tr>
<tr>
<td>11/10/22</td>
<td>SWU Bill</td>
</tr>
<tr>
<td>8/10/22</td>
<td>SWU Bill</td>
</tr>
</tbody>
</table>
Sample Fall 2023 E-bill/Statement

**NOTE** – Student must accept offered financial aid in self-service before it will appear on the e-bill.

<table>
<thead>
<tr>
<th>DATE</th>
<th>STATEMENT ACTIVITY</th>
<th>CHARGES</th>
<th>CREDITS</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/01/23</td>
<td>*** Balance Forward ***</td>
<td>$446.83</td>
<td></td>
</tr>
<tr>
<td>07/01/23</td>
<td>Registration - 23/FA</td>
<td>$25,279.00</td>
<td></td>
</tr>
<tr>
<td>07/01/23</td>
<td>Housing - 23/FA</td>
<td>$8,701.00</td>
<td></td>
</tr>
<tr>
<td>07/01/23</td>
<td>5 Meals/week</td>
<td>$984.50</td>
<td></td>
</tr>
<tr>
<td>07/01/23</td>
<td>$100 Pirate Bucks</td>
<td>$100.00</td>
<td></td>
</tr>
<tr>
<td>07/01/23</td>
<td>23/FA Vehicle Registration</td>
<td>$100.00</td>
<td></td>
</tr>
<tr>
<td>07/01/23</td>
<td>2023-24 Devar Tuition Refund</td>
<td>$555.00</td>
<td></td>
</tr>
<tr>
<td>07/01/23</td>
<td>2023-24 Student Health Insuranc</td>
<td>$2,465.00</td>
<td></td>
</tr>
<tr>
<td>07/03/23</td>
<td>23/FA Student Service &amp; It Fee</td>
<td>$150.00</td>
<td></td>
</tr>
<tr>
<td>07/03/23</td>
<td>23/FA Waive Devar Refund Ins</td>
<td>-$555.00</td>
<td></td>
</tr>
<tr>
<td>07/03/23</td>
<td>23/FA Waive Student Health Ins</td>
<td>$2,465.00</td>
<td></td>
</tr>
</tbody>
</table>

**Subtotal:** $31,867.67

**CONFIRMED FINANCIAL AID**

<table>
<thead>
<tr>
<th>Financial Aid</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>McKenzie Scholar Award</td>
<td>$12,250.00</td>
</tr>
<tr>
<td>Federal Pell Grant</td>
<td>$1,023.00</td>
</tr>
</tbody>
</table>

**Confirmed Financial Aid:** $13,273.00

**AMOUNT DUE:** $18,594.67

**Full-time Tuition (12-19 credits) is $25,279**

**Lab Fees = $75**

**Total of 2 Registration Lines = $25,279**
**Financial Aid Needing Attention Example**

NOTE – ACTION IS NEEDED to move items from “Needing Attention” Section to “Confirmed Aid” Section.
NOTE – If your Financial Aid is still in verification, federal aid will NOT appear on the e-bill, but this message will appear.
Transact Payments Portal - Making a Payment

Need to enroll in a payment plan?
Enrolling in a payment plan takes just a few minutes and can help you spread out payments on your education expenses.

View payment plan options

Recent transactions

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Receipt</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>4/2/20</td>
<td>20_SP: SU Spring 2020 Payment Plan</td>
<td>#59819</td>
<td>$500.53</td>
</tr>
<tr>
<td>3/1/20</td>
<td>20_SP: SU Spring 2020 Payment Plan</td>
<td>#59144</td>
<td>$1,433.87</td>
</tr>
<tr>
<td>2/1/20</td>
<td>(Summer III 2020)</td>
<td>#58408</td>
<td>$200.00</td>
</tr>
</tbody>
</table>

Make a payment
### Make a Payment

#### Balance items

<table>
<thead>
<tr>
<th>Description</th>
<th>Balance</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Fall 2023)</td>
<td>$25,279.00</td>
<td>$25,279.00</td>
</tr>
<tr>
<td>(Spring 2023)</td>
<td>$400.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

**Total balance**: $25,679.00  
**Pay amount**: $25,279.00  
**Remaining balance**: $400.00

*Indicates required field*
## Make a Payment

**Payment amount**

$25,279

**Payment method**

- New credit or debit card
- New bank account
- International payment
  - Bank Transfer or Credit Card

---

Secure encrypted payment

[Cancel](#)  [Continue](#)
SU Payment Plan

- The SU Payment plan is located in Transact Payments Portal (Parents/payers need authorization to log into Parent Portal).
- Each semester requires enrolling in a new payment plan.
- $25 nonrefundable enrollment fee per semester.
- No interest charged and no credit check.
- Payment plan is tied to the student account balance due (actual balance on the student account less any confirmed financial aid).
SU Payment Plan

FALL PAYMENT PLANS

<table>
<thead>
<tr>
<th>Enrollment Deadline</th>
<th># of Monthly Payments</th>
<th>Payment Due Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>June 9</td>
<td>5</td>
<td>June 10, July 10, Aug 10, Sept 10, Oct 10</td>
</tr>
<tr>
<td>July 9</td>
<td>4</td>
<td>July 10, Aug 10, Sept 10, Oct 10</td>
</tr>
<tr>
<td>August 9</td>
<td>3</td>
<td>Aug 10, Sept 10, Oct 10</td>
</tr>
</tbody>
</table>

SPRING PAYMENT PLANS

<table>
<thead>
<tr>
<th>Enrollment Deadline</th>
<th># of Monthly Payments</th>
<th>Payment Due Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>December 9</td>
<td>5</td>
<td>Dec 10, Jan 10, Feb 10, Mar 10, Apr 10</td>
</tr>
<tr>
<td>January 9</td>
<td>4</td>
<td>Jan 10, Feb 10, Mar 10, Apr 10</td>
</tr>
<tr>
<td>February 9</td>
<td>3</td>
<td>Feb 10, Mar 10, Apr 10</td>
</tr>
</tbody>
</table>
SU Payment Plan

- The payment plan total will automatically adjust if the student account balance changes, resulting in future monthly payment(s) also changing.

- If the payment plan has to be cancelled for nonpayment, there is a $100 cancellation fee and the student account balance will become due immediately.

- Please contact Student Accounts FIRST if there is more than one person paying on a student’s account.
Need to enroll in a payment plan?

Enrolling in a payment plan takes just a few minutes and can help you spread out payments on your education expenses.

View payment plan options
Payment Plan Enrollment

Step 1 of 4: Agreement

$9,083.17
You've opted to enroll this amount in 23_FA: 23 Fall Payment Plan

Review the payment schedule and terms and conditions below.

Payment Schedule

1. $2,270.79 Payment due 7/10/23
2. $2,270.79 Payment due 8/10/23
3. $2,270.79 Payment due 9/10/23
4. $2,270.80 Payment due 10/10/23

Terms and Conditions

Please read below and indicate your agreement to be bound by these terms and conditions by selecting the checkbox below.

Southwestern University
Payment Plan Agreement Terms & Conditions

By enrolling in the Southwestern University Monthly Payment Plan (payment plan), I agree to the following terms and conditions:

- [ ] I have read and agree to the SJU Payment Plan terms and conditions presented.
Auto Payments

The Auto pay box is automatically checked. If you do not want to pay with same method, uncheck box.

Don’t forget
Credit/Debit Card transactions have a 2.75% fee.

---

**Service charge**

This site is owned and operated by Transact Campus, Inc. If you choose to make a payment by using Transact Campus SmartPay, you will be charged a service charge for each payment as shown below. This charge is assessed by Transact Campus, Inc. Service charges are included in your transaction and are paid directly to Transact Campus, Inc. Service charges are non-refundable.

<table>
<thead>
<tr>
<th>Amount due now</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>22_FA: SU Fall 2022 Payment Plan</strong></td>
<td></td>
</tr>
<tr>
<td>Enrollment fee</td>
<td>$25.00</td>
</tr>
<tr>
<td>Service charge</td>
<td>$0.69</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$25.69</strong></td>
</tr>
</tbody>
</table>

**Payment Schedule**

1. $6,056.25 + $166.55 service charge = $6,222.80  
   Payment scheduled 7/10/22 | Payment due 7/10/22

2. $6,056.25 + $166.55 service charge = $6,222.80  
   Payment scheduled 8/10/22 | Payment due 8/10/22

3. $6,056.25 + $166.55 service charge = $6,222.80  
   Payment scheduled 9/10/22 | Payment due 9/10/22

4. $6,056.25 + $166.55 service charge = $6,222.80  
   Payment scheduled 10/10/22 | Payment due 10/10/22

- I acknowledge that I have read and accept the terms and conditions of the Transact Campus, Inc. user agreement and I understand that my transaction includes a non-refundable service charge for each payment for the use of Transact Campus SmartPay.

[View terms and conditions](#)
Sample E-bill with Payment Plan

---

**Southwestern University**

1001 E. University Ave.
Georgetown, TX 78626
512-863-1928
studentsaccounts@southwestern.edu

---

**Payment Summary**

- **Statement Date:** 07/03/23
- **Student ID:** XXXXXX
- **Due Date:** 07/14/23
- **Total Amount Due:** $15,190.00

**Payment Options:**
- **In Person:** At Business Office, located on first floor of Cullen Building
- **By Mail:** P.O. Box 770, Georgetown, TX 78626 (include Student ID number on check)
- **Online:** Students use “Make a Payment” link on WebAdvisor. Parents go to https://commerce.cashnet.com/swpay & log on using their account information sent to them by their student.

---

**Important Information**

Fall Balances are due Friday, July 14. Waivers are due July 13. The waivers can be found at: https://www.southwestern.edu/business-office/student-accounts/waivers-for-optional-charges/

**Date** | **Statement Activity** | **Charges** | **Credits**
--- | --- | --- | ---
07/01/23 | Registration - 23/FA | $25,429.00 | 
07/01/23 | $75 Pirate Bucks | $75.00 | 
07/01/23 | 23/FA Vehicle Registration | $100.00 | 
07/01/23 | 2023-24 Dewar Tuition Refund | $555.00 | 
07/01/23 | 2023-24 Student Health Insurant | $2,465.00 | 
07/01/23 | 23/FA Student Service & It Fee | $150.00 | 
07/03/23 | 2023-24 Dewar Tupertins Waiver | -$555.00 | 
07/03/23 | 2023-24 Health Insurance Waive | -$2,465.00 | 
07/03/23 | 12 Meals/Week | $2,698.00 | 

**Subtotal:** $28,452.00

**Confirmed Financial Aid**

- Ruter Scholar Award
  - $1,740.00
- Tuition Equalization Grant
  - $100.00

**Confirmed Financial Aid:**

- $13,262.00

**Payment Plan Information**

<table>
<thead>
<tr>
<th>Term</th>
<th>Payment Plan</th>
<th>Due Date</th>
<th>Installment Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>23_FA</td>
<td>23 Fall Payment Plan</td>
<td>7/10/2023 12:00:00 AM</td>
<td>$3,797.50</td>
</tr>
<tr>
<td>23_FA</td>
<td>23 Fall Payment Plan</td>
<td>8/10/2023 12:00:00 AM</td>
<td>$3,797.50</td>
</tr>
<tr>
<td>23_FA</td>
<td>23 Fall Payment Plan</td>
<td>9/10/2023 12:00:00 AM</td>
<td>$3,797.50</td>
</tr>
<tr>
<td>23_FA</td>
<td>23 Fall Payment Plan</td>
<td>10/10/2023 12:00:00 AM</td>
<td>$3,797.50</td>
</tr>
</tbody>
</table>

**Payment Plan Amount Due**

- $15,190.00
### 3 Optional Charges/Waivers

#### STUDENT ACCOUNTS
- Key Dates and Deadlines
- How To Videos
- Accessing Student Account Information
- Transact Payment Portal Instructions - Access & Overview
- Understanding Your E-bill

#### Waivers for Optional Charges

<table>
<thead>
<tr>
<th>Waiver Type</th>
<th>Amount of Charge 2023-2024</th>
<th>Waiver Site Opens</th>
<th>Waiver Site Closes</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Vehicle Registration)</strong></td>
<td>$100 each semester</td>
<td>Fall 2023: 5/1</td>
<td>Fall 2023: 7/13</td>
<td>Each Semester</td>
</tr>
<tr>
<td><strong>NOTE</strong> - Can only be done by students since it requires log in through student email.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Dewar Tuition Refund Plan</strong></td>
<td>$555</td>
<td>5/1</td>
<td>7/13</td>
<td>Annually</td>
</tr>
<tr>
<td><strong>IMPORTANT</strong> - Policy coverage is 75% for both injury and illness withdrawals &amp; mental health withdrawals.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>New SU Students for Spring 2024</strong></td>
<td>$277</td>
<td>11/1</td>
<td>1/12</td>
<td>Spring 2024</td>
</tr>
<tr>
<td><strong>Student Health Insurance</strong></td>
<td>$2,465 for academic year</td>
<td>5/1</td>
<td>7/13</td>
<td>Annually</td>
</tr>
<tr>
<td><strong>NOTE</strong> - A verification code will be sent to the student's SU email as part of the validation process.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

**July 13, 2023 – last day to waive ALL 3 optional charges!**
The fine for parking on campus without a parking decal is $125 per violation.

The vehicle waiver form must be completed by the student. It requires log in through the SU student email.
Dewar Tuition Refund Plan

- Third party insurance designed to protect the financial investment of students and parents by providing up to 75% refund of tuition, on-campus housing & meals AFTER SU’s standard refund policy is applied when a student withdraws for medical reasons (includes mental health).

- $555 Dewar Tuition Refund Plan Annual Charge for 2023-24. Covers both Fall & Spring semesters.

- Southwestern does not keep any of the premium.

- Automatically charged to all student accounts annually on the Fall bills.

- Can waive tuition refund charge by completing on-line waiver form at Dewar website before **July 13, 2023**.
Dewar Tuition Refund Plan

- Claims require a Medical Form completed by a doctor.

- Benefit payments are made directly to Southwestern to settle the student’s account. Any remaining credit on the account will be refunded to the student.

- Amount of coverage can be adjusted (i.e., only insure cost less financial aid). Call or email Student Accounts for details.
Dewar Tuition Refund Plan

Dewar provides up to a 75% refund of covered term tuition and on campus housing and meals when a student withdraws for medical reasons.

**Tuition Refund Example:**

<table>
<thead>
<tr>
<th>If the Medical Withdrawal Occurs:</th>
<th>University Refunds:</th>
<th>Dewar Refunds:</th>
<th>Student Receives:</th>
</tr>
</thead>
<tbody>
<tr>
<td>During first full week of classes</td>
<td>80%</td>
<td>0%</td>
<td>80%</td>
</tr>
<tr>
<td>During second full week of classes</td>
<td>60%</td>
<td>15%</td>
<td>75%</td>
</tr>
<tr>
<td>During third full week of classes</td>
<td>50%</td>
<td>25%</td>
<td>75%</td>
</tr>
<tr>
<td>During fourth full week of classes</td>
<td>40%</td>
<td>35%</td>
<td>75%</td>
</tr>
<tr>
<td>During fifth full week of classes</td>
<td>30%</td>
<td>45%</td>
<td>75%</td>
</tr>
<tr>
<td>After the fifth full week of classes</td>
<td>0%</td>
<td>75%</td>
<td>75%</td>
</tr>
</tbody>
</table>
The deadline for waiving is:
July 13, 2023

Don't let an unforeseen illness or accident prevent you from completing your education.

Every year thousands of college students are forced to withdraw from classes due to sickness or injury. The accompanying loss of tuition payments can undermine a family's educational budget.

For more than 80 years, the Dewar Tuition Refund Plan has assisted students to continue their education by providing refund benefits when illnesses or injuries prevented them from completing a term.

Please note that all students are automatically enrolled in this insurance program and will be billed for the premium charge unless a waiver of benefits is completed.

To request a change in the amount of coverage provided, do not complete this waiver. Contact the Southwestern University Business Office directly at 512-863-1928 or studentaccounts@southwestern.edu

Those who wish to waive the coverage, please complete the waiver form on this page. By submitting this form, you

Student Information

First

Middle

Last

Student ID

Re-enter Student ID

E-mail address

I wish to waive participation in the Tuition Refund Plan offered by Dewar.

All information provided is strictly confidential and used solely for waiver of the Tuition Refund Plan.

Submit
Student Health Insurance

- All full time students are required to have health insurance as a condition of enrollment at SU. If you do not have your own, SU provides a health insurance option.

- Premium is automatically charged to all student accounts annually on the Fall bills.

- Premium for 2023-24 is $2,465.

- Southwestern does not keep any of the insurance premium.

- 12 month coverage period of 8/10/2023 to 8/9/2024.

- Insurance policy is portable.
EIIA Early Enrollment & On-line Waiver Process

- Early Enrollment - helps ensure access to the medical ID card when the policy begins in August.

- To waive coverage - Required to input your primary insurance information related to your personal/family health plan that is covering the student. Waiver site closes **July 13, 2023**.

- Your personal insurance plan **must** provide coverage locally in the SU area.
NOTE –
Turning in your Health Insurance Card and information to SU Health Center or SU Athletics DOES NOT Meet this waiver requirement.
Guaranteed Tuition Plan (TX Tomorrow) or other State Prepaid Plan (Florida, Mississippi, etc.)

- Notify Student Accounts at studentaccounts@southwestern.edu if you have a Texas Guaranteed Tuition Plan (TX Tomorrow) or another state’s prepaid plan.

- TX Tomorrow – Provide a copy of your ID Card in the email.

- Southwestern charges a flat tuition rate for 12-19 credit hours. We will give you a credit for 12 hours (the least amount) and will adjust your account for the actual hours after the add/drop date.
Sample Texas Tomorrow E-bill

### Important Information

<table>
<thead>
<tr>
<th>DATE</th>
<th>Statement Activity</th>
<th>Charges</th>
<th>Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/01/23</td>
<td>*** Balance Forward ***</td>
<td></td>
<td>-$1,334.49</td>
</tr>
<tr>
<td>07/01/23</td>
<td>Registration - 23/FA</td>
<td>$25,279.00</td>
<td></td>
</tr>
<tr>
<td>07/01/23</td>
<td>23/FA Vehicle Registration</td>
<td>$100.00</td>
<td></td>
</tr>
<tr>
<td>07/01/23</td>
<td>2023-24 Dewar Tuition Refund</td>
<td>$555.00</td>
<td></td>
</tr>
<tr>
<td>07/01/23</td>
<td>2023-24 Student Health Insuranc</td>
<td>$2,465.00</td>
<td></td>
</tr>
<tr>
<td>07/01/23</td>
<td>23/FA Student Service &amp; It Fee</td>
<td>$150.00</td>
<td></td>
</tr>
<tr>
<td>07/02/23</td>
<td>Anticipated 23/FA Tx Tomorrow</td>
<td></td>
<td>-$4,372.20</td>
</tr>
</tbody>
</table>

Subtotal: $22,842.31
All forms must be completed by the student.
Final Reminders

- Students – Check your SU email on a regular basis!
- Students – Invite your parents to the Transact Payments portal so they can receive the E-bill & make payments.
- July 13, 2023 - Waivers are due.
- July 14, 2023 – Tuition due or enroll in a payment plan.
- Students will be able to move into on-campus housing if:
  - Account is paid in full, or
  - Enrolled in a SU Payment Plan, or
  - Financial Aid is Confirmed.
Questions

- Financial Aid Office
  - Email: finaid@southwestern.edu
  - Phone: 512-863-1259

- Business Office – Student Accounts
  - Email: studentaccounts@southwestern.edu
  - Phone: 512-863-1928 or 512-863-1927

- Self Service/Proxy Access Issues
  - Email: helpdesk@southwestern.edu