Billing, Waivers, Financial Aid and More

James Gaeta
Dean of Financial Aid

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
Financial Aid – Next Steps

Disbursement Dates

- Fall: August 16, 2024
- Spring: January 3, 2025

Merit Scholarships

- No additional steps needed

Verification

- List of required documents available on Self Service
- Priority deadline: June 14, 2024, but documents still accepted
- Must be completed before funds can be disbursed
Financial Aid – Next Steps

Tuition Equalization Grant

- Texas Residency Form - due June 24, 2024
- 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 scholarships@southwestern.edu
- For named scholarships/grants from SU
- Due date June 24, 2024

Truman J. Odiorne Scholarship

- Thank-you note
- Due date June 24, 2024
**SPROG DAY**

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 24, 2024**
SPROG DAY

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 24, 2024
Financial Aid – Next Steps

Private Loans
- Contact Lender for application information
- Private loan lender list available on Financial Aid Website
- Complete by June 24, 2024

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 24, 2024
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 October 2024 (tentative)
- 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
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
SPROG DAY

Financial Aid Appointments

- Counselors available to meet with families
- Appointments available 1:00 pm – 4:00 pm today
- Link to make appointment sent to SU email account
Billing Information
# Sprog Financial Aid & Billing Presentation - June 2023

## 2024-2025 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 2024</td>
<td>E-Bills released April 22, 2024</td>
<td>May 10, 2024</td>
</tr>
<tr>
<td></td>
<td>Returning Students E-bills - April 26, 2024</td>
<td></td>
</tr>
<tr>
<td>Fall 2024</td>
<td>Returning Students Reminder E-bills June 28, 2024</td>
<td>July 12, 2024</td>
</tr>
<tr>
<td></td>
<td>New Students - E-Bill received after registration</td>
<td></td>
</tr>
<tr>
<td>Spring 2025</td>
<td>E-bills released Nov. 15, 2024</td>
<td>Dec. 13, 2024</td>
</tr>
</tbody>
</table>
## Fall 2024 Dates

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>6/28/24</strong></td>
<td>Fall 2024 E-bills Released in Transact Payments Portal.</td>
</tr>
<tr>
<td>7/11/24</td>
<td>All waivers due.</td>
</tr>
<tr>
<td>7/12/24</td>
<td>Fall 2024 Tuition Due or Enroll in Payment Plan.</td>
</tr>
<tr>
<td>7/22/24</td>
<td>$100 Late Fee Assessed on Unpaid Balances.</td>
</tr>
<tr>
<td><strong>Fall Move In</strong></td>
<td>Balance must be paid or student is not allowed to move in &amp; classes may be cancelled.</td>
</tr>
</tbody>
</table>
## Spring 2025 Dates

<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/15/24</td>
<td>Spring 2025 E-Bills Released in Transact Payments Portal.</td>
</tr>
<tr>
<td>12/12/24</td>
<td>Spring 2025 Vehicle Waiver Due.</td>
</tr>
<tr>
<td>12/13/24</td>
<td>Spring 2025 Tuition Due or Enroll in Payment Plan.</td>
</tr>
<tr>
<td>12/20/24</td>
<td>$100 Late Fee Assessed on Unpaid Balances.</td>
</tr>
<tr>
<td>1/10/25</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 – 2.85% 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

Title | Details
--- | ---
| There are 4 requests from your institution that require your action.

- **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 help, contact brookes@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 see 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

Overview

Student Name
Southwestern University

Summary
(Fall 2024)
Balance

$17,236.00

Recent transactions

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Receipt</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>5/6/20</td>
<td>Refund: 20_FA: SU Fall 2020 Payment Plan</td>
<td>#60315</td>
<td>($25.00)</td>
</tr>
<tr>
<td>5/5/20</td>
<td>20_FA: SU Fall 2020 Payment Plan</td>
<td>#60297</td>
<td>$25.00</td>
</tr>
<tr>
<td>12/11/19</td>
<td>Payment reversal: 20_SP: SU Spring 2020 Payment Plan</td>
<td>#56948</td>
<td>($25.00)</td>
</tr>
</tbody>
</table>
Overview

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>23_SP: 23 Spring Special Payment Plan A</td>
<td>#87072</td>
<td>$1,063.59</td>
</tr>
<tr>
<td>3/10/23</td>
<td>23_SP: 23 Spring Special Payment Plan A</td>
<td>#86354</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.
Welcome to the Southwestern University Student Accounts on-line services page. From here you can do the following:
1. Access your student account e-bill
2. Make payments on-line using credit cards and electronic ACH transfers
3. Enroll in or manage a payment plan.

Students - Your log-in "User ID" is your SU ID Number.

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

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

### Overview

**Student Name:** Sn SN

**Southwestern University**

**Balance:**

- **Balance:** $17,236.00

### Summary

- **(Fall 2024):** $17,236.00

### Recent transactions

<table>
<thead>
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<td>12/11/19</td>
<td>Payment reversal 20_SP: SU Spring 2020 Payment Plan</td>
<td>#56948</td>
<td>($25.00)</td>
</tr>
</tbody>
</table>
## Statements

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>View</th>
<th>Save</th>
</tr>
</thead>
<tbody>
<tr>
<td>5/6/24</td>
<td>SWU Bill</td>
<td>📄</td>
<td></td>
</tr>
<tr>
<td>4/11/18</td>
<td>SWU Bill</td>
<td>📄</td>
<td></td>
</tr>
<tr>
<td>3/20/18</td>
<td>SWU Bill</td>
<td>📄</td>
<td></td>
</tr>
<tr>
<td>3/8/18</td>
<td>SWU Bill</td>
<td>📄</td>
<td></td>
</tr>
<tr>
<td>1/10/14</td>
<td>SWU Bill</td>
<td>📄</td>
<td></td>
</tr>
<tr>
<td>1/10/14</td>
<td>SWU Bill</td>
<td>📄</td>
<td></td>
</tr>
<tr>
<td>12/18/13</td>
<td>SWU Bill</td>
<td>📄</td>
<td></td>
</tr>
<tr>
<td>12/18/13</td>
<td>SWU Bill</td>
<td>📄</td>
<td></td>
</tr>
</tbody>
</table>
NOTE – Student must accept offered financial aid in self-service before it will appear on the e-bill.

Full-time Tuition (12-19 credits) is $26,644
Lab Fees = $75
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>
How much would you like to pay?

Balance items

<table>
<thead>
<tr>
<th>Description</th>
<th>Balance</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Fall 2024)</td>
<td>$17,536.00</td>
<td>$17,536.00</td>
</tr>
</tbody>
</table>

Total balance: $17,536.00

Pay amount: $17,536.00

Remaining balance: $0.00

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
Make a Payment

How would you like to pay?

Payment amount
$17,536

Payment method

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

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
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).
### 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 14</td>
<td>5</td>
<td>June 15, July 15, Aug 15, Sept 15, Oct 15</td>
</tr>
<tr>
<td>July 14</td>
<td>4</td>
<td>July 15, Aug 15, Sept 15, Oct 15</td>
</tr>
<tr>
<td>August 14</td>
<td>3</td>
<td>Aug 15, Sept 15, Oct 15</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 14</td>
<td>5</td>
<td>Dec 15, Jan 15, Feb 15, Mar 15, Apr 15</td>
</tr>
<tr>
<td>January 14</td>
<td>4</td>
<td>Jan 15, Feb 15, Mar 15, Apr 15</td>
</tr>
<tr>
<td>February 14</td>
<td>3</td>
<td>Feb 15, Mar 15, Apr 15</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

24 Fall Payment Plan

$17,536
Amount you can enroll in plan

5 payments | $25 enrollment fee

Payment Schedule

1. $3,507.20
   Payment due 6/15/24

2. $3,507.20
   Payment due 7/15/24

3. $3,507.20
   Payment due 8/15/24

4. $3,507.20
   Payment due 9/15/24

5. $3,507.20
   Payment due 10/15/24

[Buttons: Cancel, Enroll in plan]
Payment Plan Enrollment

$17,536
You've opted to enroll this amount in 24 Fall Payment Plan

Review the payment schedule and terms and conditions below.

Payment Schedule

1. $3,507.20  Payment due 6/15/24
2. $3,507.20  Payment due 7/15/24
3. $3,507.20  Payment due 8/15/24
4. $3,507.20  Payment due 9/15/24
5. $3,507.20  Payment due 10/15/24

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:

1. I have read the Terms and Conditions of this agreement and authorize Southwestern University and their respective agents to contact me regarding my student account and any other financial obligation to Southwestern University at the current or any future number that I provide for my cellular or other wireless device using automated telephone dialing equipment, artificial, or pre-recorded voice or text messages.

Have read and agree to the SU Payment Plan terms and conditions presented.
Don’t forget Auto Payments

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

Continue
Credit/Debit Card transactions have a 2.85% fee.
Sample E-bill with Payment Plan
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**

Payment Options

Payment Plan

Setting up Authorized Payers

Student Account Refunds

Late Payment Policy

Payment Terms Agreement

Withdrawal Refund Policy

1098-T Form

**Vehicle Registration Fee**

- Amount: $120 each semester
- Opens: Fall 5/1/2024
- Closes: Fall 7/11/2024
- Important: Can only be done by students since it requires login through student email

**Dawah Tuition Refund Plan**

- Amount: $500
- Academic Year: 2024-25
- Opens: 5/1/2024
- Closes: 7/11/2024
- Important: Policy coverage is 75% for both injury and illness withdrawals & mental health withdrawals

**Student Health Insurance**

- Amount: $2,468
- Academic Year: 2024-25
- Opens: 5/1/2024
- Closes: 7/11/2024
- Important: New SU Students for Spring 2025

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**July 11, 2024 – 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 2024-25. 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 11, 2024.
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 11, 2024

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 are waiving your entitlement to any coverage offered by the Tuition Refund Plan and you will not be responsible for the cost to participate.

**Student Information**

<table>
<thead>
<tr>
<th>First</th>
<th>Middle</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Student ID</th>
<th>Re-enter Student ID</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>E-mail address</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

☐ 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.
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 2024-25 is $2,468.

- Southwestern does not keep any of the insurance premium.

- 12 month coverage period of 8/10/2024 to 8/9/2025.

- 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 11, 2024.

- 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.

Southwestern University

Your institution is concerned with your health and well-being. Student insurance is an important part of your studies. Please take advantage of the information available and review the Full Plan Document for coverage details. If you have questions, please contact us at 888.255.4029.

Waiver and Enrollment

Enrollment and waiver forms for the 2023-24 academic year will be open on 05/01/23 at 12:00 AM and close on 07/13/23 at 11:59 PM. Make sure that you either waive coverage or enroll in Southwestern University’s insurance program to ensure that you have adequate insurance coverage while in attendance. If you have any questions, please do not hesitate to contact us at 888.255.4029.

ENROLL OR WAIVE

SU ATHLETES ONLY - ENROLL IN INDIVIDUAL PRIMARY SPORTS PLAN
The Black & Gold Advantage program makes getting your course materials more convenient and affordable.

- Receive all your course materials before the first day of class
- Save 35-50% on the cost of course materials each term
- Benefit from a highly personalized service

How it Works

**REGISTER FOR CLASSES**
Upon registering for courses, you will be automatically enrolled into the program.

**VERIFY YOUR ORDER**
Starting 30 days before the first day of classes, you will receive an email to verify your order and select your fulfillment preference.

**RECEIVE YOUR TEXTBOOKS**
An email notification will be sent when your order is ready for pickup or when it ships. Your digital materials will be delivered for your course(s) within Moodle.
Southwestern Black & Gold Advantage

- $25 per credit. Full time minimum charge of $300
- Opt out period starts August 12
- After 12th class day account will be adjusted for actual enrolled credits.
Guaranteed Tuition Plan (TX Tomorrow) or other State Prepaid Plan (Florida, Mississippi, etc.)

- Notify Student Accounts at studentaccounts@southernwestern.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.
Using a 529 Plan

- Contact your 529 plan to initiate the withdrawal.
- Provide mailing address for Southwestern & your student ID number
- They will then mail a payment to Southwestern. Please keep in mind that this can take several business days to process before the payment is mailed
- Once requested, please notify Student Accounts at studentaccounts@southwestern.edu so we can be on lookout for payment
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. There are 2 invitations necessary. Proxy & Transact portal
- July 11, 2024 - Waivers are due.
- July 12, 2024 – 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**.
Contact Information

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

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