

# Accessing On-Line Student Account Information

Students must use their SU information to log into their WebAdvisor account to access the screen below.

**SOUTHWESTERN UNIVERSITY** LOG OUT | MAIN MENU

**CURRENT STUDENTS - WEBADVISOR FOR STUDENTS MENU**

The following links may display confidential information.

User Account	Academic Planning
<a href="#">Contact Information</a> <a href="#">Contact Information</a>	<a href="#">Student Planning</a> <a href="#">Apply for Graduation</a>
Financial Information	Academic Profile
<a href="#">Account Summary</a> <a href="#">View E-Bill &amp; Make a Payment</a> <a href="#">Federal Title IV Funds Authorization</a> <a href="#">Payment Terms Agreement</a>	<a href="#">My class schedule</a> <a href="#">My profile</a> <a href="#">Apply for Graduation</a> <a href="#">Transfer by Course</a> <a href="#">Confirmation of Attendance</a> <a href="#">Transcript Request</a>
Financial Aid	Student Life
<a href="#">Financial aid award letter</a> <a href="#">Federal Title IV Funds Authorization</a>	<a href="#">Post Office Box Combination</a> <a href="#">Assigned Room Check-In Form</a> <a href="#">Add/Change Meal Plan</a> <a href="#">Student Handbook Agreement</a> <a href="#">First-Year Students - Preferences for Housing and First-Year Seminar</a> <a href="#">Incoming Transfer/Re-Admit Student Housing Request - On &amp; Off Campus</a> <a href="#">Returning Student Room Selection</a>
Communication	
<a href="#">My Documents</a>	
Registration	
<a href="#">SU Search for Sections</a> <a href="#">Register for Sections</a> <a href="#">Manage My Waitlist</a> <a href="#">Registration Eligibility</a> <a href="#">Self-Service</a>	

The student account information is found using the links in the “Financial Information” section:

**Financial Information**

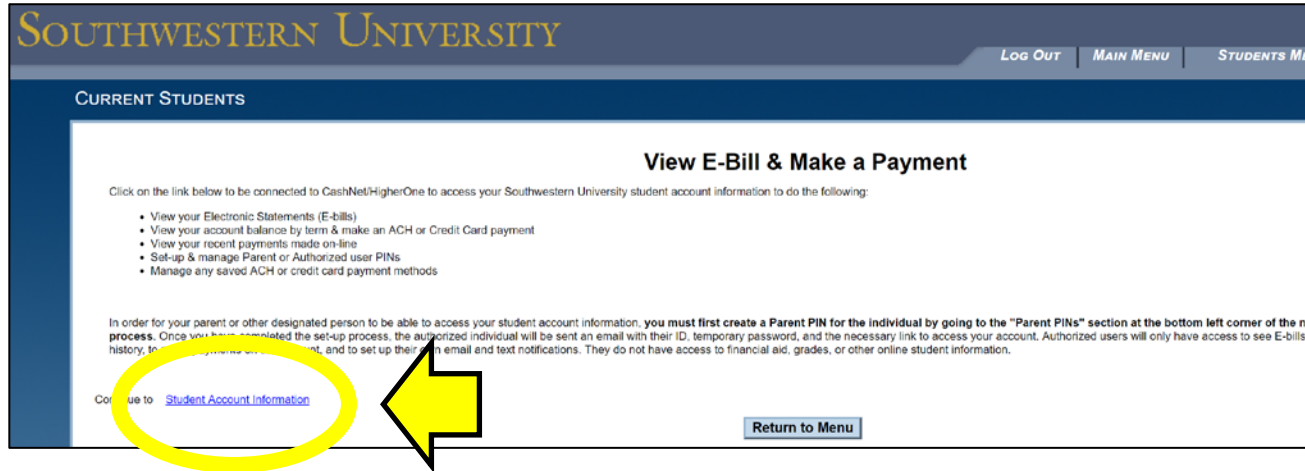
- [Account Summary](#)
- [View E-Bill & Make a Payment](#)
- [Federal Title IV Funds Authorization](#)
- [Payment Terms Agreement](#)

- “Account Summary” link – use to access a current student account statement that is updated on a daily basis.
- “View E-Bill & Make a Payment” link – use to access e-bills, make ACH and credit card payments, set up Parent PINs for access, set up text and email notifications.



- **“View E-Bill & Make a Payment” link**

- To continue to the student account information, the link “Student Account Information” must be selected.



- Selecting the link above will take you to the “Student Account” main screen to do the following things: (See next page for picture of the screen layout.)
  - ✓ View account balance by term
  - ✓ Access E-bills
  - ✓ Make ACH or credit card payments
  - ✓ View previous ACH or credit card payments made on-line
  - ✓ Manage any saved ACH or credit card payment methods
  - ✓ Set up text and email alerts for e-bills and payments
  - ✓ Give Parents or Authorized Users access by setting up a user PIN
  - ✓ Change Parent or Authorized User access

## Student Account

Student Name

**IMPORTANT NOTICE - Electronic bills (E-bills) are now in effect & paper statements will be discontinued!**

It is important to make sure that your parent or other authorized individual is set up to access your E-bills. For help setting up student & parent access and notification for E-bills please click [here](#).

### Your Account

Current Balance \$26,204.50  
[Click here to make a payment](#) (Zero or credit balances are not displayed)  
The last payment received was for \$102.75 on 10/15/2016.

### Your Recent Payments

[View All](#)  
10/15/2016 \$102.75 [View](#)

### Parent PINs

[Add New](#)  
Parents or Authorized Users Whom You Have Granted Access to Your Account:  
You currently have the following User ID:s set up.  
Mic [REDACTED] [Edit](#) [Delete](#)

### Your Bills

[View All](#)  
To view all your bills click 'View All'.  
 SWU Bill 07/23/2018 [View](#)  
 SWU Bill 07/17/2018 [View](#)  
 SWU Bill 07/05/2018 [View](#)

### Saved Accounts

[Add New](#)  
You have no saved payment methods.

### Account Details

[SMS Alert Setup](#)

To Make Pmts

Online Pmts

Give Access to Parents

Access E-Bills

Save Pmt. Info

Set-up Text Alerts

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## "YOUR ACCOUNT" Section –

- The current balance shown here is the actual balance due on the student account. This balance may be higher than expected if it is prior to 10 days before the first class day; thus, any financial aid funds have not yet been applied to the student account.
- To make a payment for a lesser amount (current balance less confirmed financial aid), select the "Click here to make a payment" link to proceed to the next screen, select the term, and then change the amount before submitting the payment.

Your Account	
Current Balance	\$26,204.50
<a href="#">Click here to make a payment</a> (Zero or credit balances are not displayed)	
The last payment received was for \$102.75 on 10/15/2016.	

# Southwestern University

[your account](#) [view bills](#) [make payment](#) [Basket](#) [help](#) [sign out](#)

## Student Account

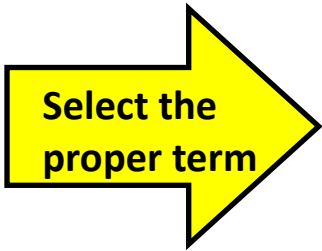
Student Name

Your account currently has the following charges:

Description	Amount
Account Balance (Fall 2018)	\$26,167.00
Account Balance (Summer I (May Term) 2018)	\$37.50

You may also purchase the following items:

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Select the proper term

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## Student Account

Student Name

[HOME](#)

Account Balance  
Fall 2018

Amount:

To pay for this item, click the button below.

[Add to Basket](#)

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Enter the amount you want to pay.

## STUDENT ACCESS & TEXT ALERTS

Students will receive an email to their SU email account notifying them when a new statement is available! Reminder emails will also be sent if the e-bill is never viewed. The bottom section ("Account Details") allows students to set up text message alerts for notification when a new statement is available, as well as other events such as invalid bank account information, when a payment is processed, or when an authorized user has made a payment to your account.

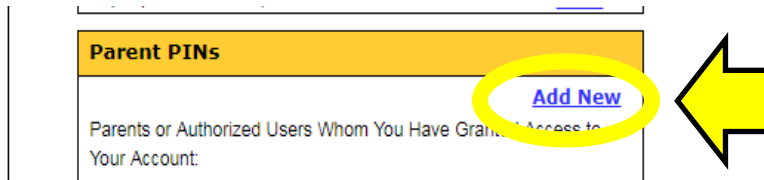
# SETTING UP PARENT ACCESS (This is a 2 step process.)

## STEP 1 - Student Must Give Parent/Individual Access

In order for parents or other individuals to receive access to e-bills, receive alerts, and have the ability to make on-line payments, the student must setup the parent with a “Parent Pin” and give them the proper permissions.

### To Setup a New Parent Pin –

- 1) If the student has not set up the parent or other individual with a “PIN,” the student must select the “Add New” link.



- 2) Create a “User ID” that the parent or authorized payer will use and fill in the required information indicated with a red asterisk. The email address is required to send the login information to the parent. If desired, you can add a phone number, address and a note that will be sent with the welcome email.

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**Student Account**

**Notice about Parents or Authorized Users:**  
Parents or Authorized Users only have access to make payments and see payment history and balances on the student account. They do NOT have access to financial aid, grades, or other online student information.

User ID: Mom

First Name: Betty \*

Last Name: Smith \*

Email Address: BettySmith@gmail.com \*

Confirm Email Address: BettySmith@gmail.com \*

Relationship to Student: Parent \*

Phone Number: 512-883-1234

Address Line 1: 1001 University Avenue

Address Line 2:

City: Georgetown

State: TX

Zip: 78020

Add a note to the welcome email (optional):  
Mom - this is to set you up so you can view and pay my bill on-line.  
Love you! Sarah

Should this person...  
be allowed to log in?  Yes  No  
have permission to access electronic bills and if so, also receive electronic bill email notifications?    
be allowed to receive SMS (text message) notifications?  Yes  No

A welcome email will be sent to the email address entered above. The email will contain the optional note, login ID, temporary password and a link to access this site.

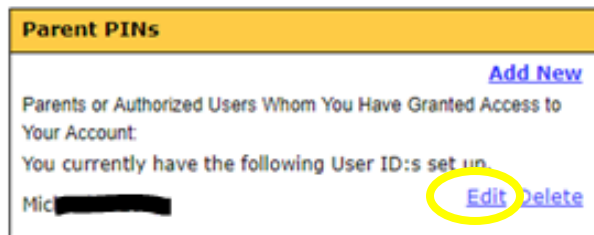
OK Cancel

3) Select the permission to give the person at the bottom of the screen.

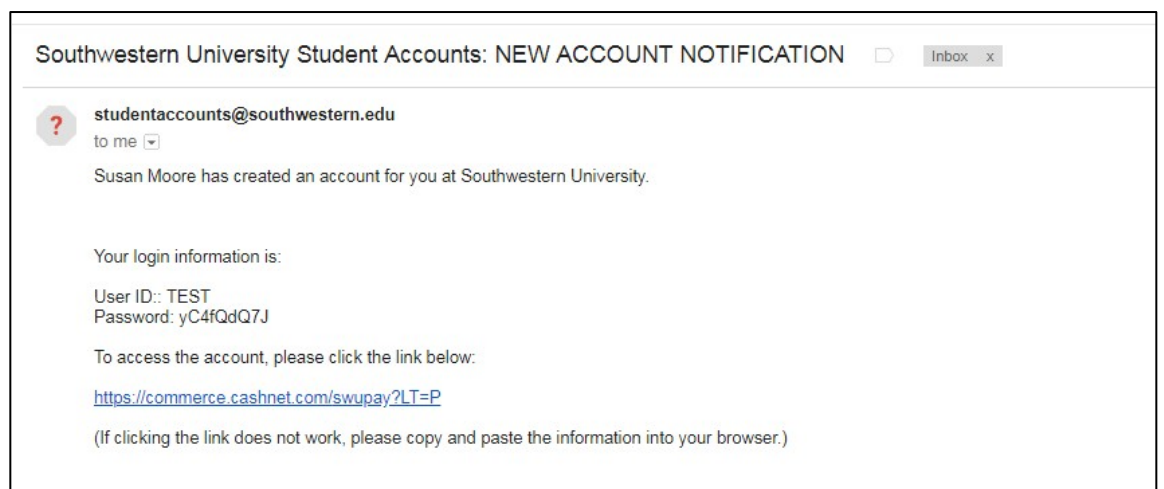
Should this person...	
be allowed to log in?	<input checked="" type="radio"/> Yes <input type="radio"/> No
have permission to access electronic bills and if so, also receive electronic bill email notifications?	Access & Receive Emails ▼
be allowed to receive SMS (text message) notifications?	<input checked="" type="radio"/> Yes <input type="radio"/> No

**If Parent Already has a Parent Pin –**

Select “edit” next to the parent pin and change the permissions selected for the individual as noted above.



4) A welcome email will be automatically sent to the new authorized user/parent email address entered with a log on ID, temporary password, and a link to access the site.



## STEP 2 - Parent Must Log-In & Complete Setup Process

1. Using the “New Account Notification” email generated by the student, the parent should select the link to access the account provided in the email and log on using the provided User Id and Password.
2. Once logged in, the main screen will appear as below:

The screenshot shows the 'Student Account' dashboard with a yellow navigation bar at the top containing links for 'your account', 'view bills', 'make payment', 'Basket', 'help', and 'sign out'. The main content area is divided into several sections:

- Your Account:** Shows a current balance of \$20,630.00, a link to 'Click here to make a payment', and a note that the last payment received was for \$2.00 on 5/23/2017.
- Your Recent Payments:** A table with columns for date, amount, and a 'View' link for each entry.
- Your Bills:** A list of bills with columns for bill type, date, and a 'View' link.
- Saved Accounts:** A section indicating no saved payment methods are present.
- Account Details:** A section showing user information such as User ID, Name, Email, and Relationship to Student, along with links to 'Change your password' and 'SMS Alert Setup'.

Yellow callout boxes with arrows point to the following features:

- 'Make Pmts.' points to the 'Click here to make a payment' link in the 'Your Account' section.
- 'Online Pmts' points to the 'View' links in the 'Your Recent Payments' table.
- 'Access E-Bills' points to the 'View' links in the 'Your Bills' list.
- 'Save Pmt. Info.' points to the 'Add New' link in the 'Saved Accounts' section.
- 'Change Contact Info.' points to the 'Edit' link in the 'Account Details' section.
- 'Setup Text Alerts' points to the 'SMS Alert Setup' link at the bottom of the 'Account Details' section.

### 3. To Setup or Change Text Alerts –

- To set up text notifications, select “SMS Alert Setup” at the bottom of the “Account Details” section.
- Select the events that you want to receive text messages for & click “Save.”

The 'SMS events' form contains the following text and options:

Click [here](#) to change your mobile settings.

Select the event(s) for which you want to receive SMS alerts.

- When I can view a new electronic statement
- Reminder for available eBill
- When a payment is made on my account

At the bottom of the form are two buttons: 'Cancel' and 'Save'.



4. To enter or change your mobile number, select the link at the top of the box (see screen above) that says “Click [here](#) to change your mobile settings.” and the following box will appear to enter your service provider and mobile number.

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**Student Account**

Student Name

**SMS setup**

Select a wireless service provider

Mobile Number

5. After saving the information, a text message that contains a **4-digit confirmation code** will be sent to the mobile number which needs to be entered in the box that appears on the screen below in order to complete the text alert setup process.

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**Student Account**

Student Name

**SMS confirmation code**

An SMS message with a 4-digit confirmation code has been sent to 512-818-0225. When you receive the confirmation code, enter it in the box below.

Confirmation Code:

**Note:** Please allow a few minutes for your confirmation code to arrive. The code is sent immediately but many factors can influence how fast it arrives.

If you haven't received your confirmation code after a few minutes, please make sure the number listed above is correct. To change your mobile phone number, [click here](#). To request a new confirmation code, [click here](#).

If you request a new confirmation code the previous code will become invalid even if it has not yet arrived.

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