

Instructions to set-up bank information in WebAdvisor Self-Service for refunds, reimbursements and payments (non-payroll payments)

This authorization will remain in effect while you are at Southwestern University. It is your responsibility to update this information immediately if your bank information changes.

BEFORE YOU BEGIN: Please verify with your financial institution the routing number and your bank account number for ACH direct deposits. Your online banking website might also provide this information.

Questions about electronic deposit setup or changes?

Contact Loretta Waclawczyk in the SU Business Office at waclawcl@southwestern.edu or at 512-863-1481.


1. Log-on to your SU WebAdvisor account, then under the “Registration” section, select the “Self-Service” link.

CURRENT STUDENTS - WEBADVISOR FOR STUDENTS MENU

The following links may display confidential information.

User Account	Student Planning Apply for Graduation
Financial Information	My class schedule My profile Apply for Graduation Transcript by Course Confirmation of Attendance eTranscript Request
Financial Aid	
Communication	Post Office Box Cor Assigned Room Ch Add/Change Meal F Student Handbook / First-Year Students Incoming Transfer/F Returning Student F
Registration	



[SU Search for Sections](#)
[Register for Sections](#)
[Manage My Waitlist](#)
[Registration Eligibility](#)
[Self-Service](#)



2. Select Banking Information.


Hello, Welcome to Colleague Self-Service!

Choose a category to get started.


-  **Banking Information**
Here you can view and update your banking information.
-  **Course Catalog**

3. Select the “Add an Account” link.

Banking Information

Active Accounts  [+ Add an Account](#)

Refunds, Reimbursements & Payments [View All](#)

 You have no active refund/reimbursement account. Your entire refund/reimbursement will be paid by paper check.

4. Toggle “Refund, Reimbursement & Payment Deposit” to “ON.”
5. The effective date should be today’s date in MM-DD-YYYY FORMAT. Do not enter any other date.
6. Select “Next.”

The screenshot displays the 'Banking Information' section of a web application. The page title is 'Banking Information' with a '< Back' link. Below the title, there are two main sections: 'New Deposit' and 'Add a Bank Account'. The 'Bank Account Usage' section contains a toggle for 'Refund, Reimbursement & Payment Deposit' which is currently set to 'ON' (indicated by a green background and a checkmark icon). A red arrow points to this toggle. Below the toggle is the 'Effective Date' field, which contains the date '8/3/2018'. Another red arrow points to the 'Next' button at the bottom right of the form. The page footer includes the text 'Southwestern University - TEST © 2000-2018 Elucian Company L.P. and its affiliates. All rights reserved. Privacy' and a system tray at the bottom right showing the time '10:12 AM' and date '8/3/2018'.

7. A window will open to enter your bank information:

- a. Account nickname: Leave blank or enter an identifier.
- b. Routing number (9 digits only).

If you get an error message, contact Loretta Waclawczyk in the SU Business Office at waclawcl@southwestern.edu or at 512-863-1481.

- c. Bank account number.
- d. Account type (checking or savings account).
- e. Agree to the terms and conditions.
- f. Submit.

Edit Bank Account Details

New Account

Account Nickname
New Account

Country of Bank
United States

Routing Number *
View sample check image

Bank Account Number *
View sample check image

Re-enter Bank Account Number *
View sample check image

Account Type

Back Submit

After the Information is entered:

8. An email notification will be sent to your SU email address.
9. You will then be returned to the “HOME” page.
10. Your new account will show as “Not Verified” until the Business Office pre-notes the information with your bank.

Banking Information

Active Accounts + Add an Account

Refunds, Reimbursements & Payments	Verification	View All
New Account	Not Verified 	>

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NOTE: A “Verified” status indicates only that a pre-note has been sent to your bank for validation. Once pre-noted, it can take up to 5 business days for the receiving bank to notify the SU Business Office of invalid information. The SU Business Office will notify the student via SU email if corrections are needed.

THANK YOU FOR USING ELECTRONIC DEPOSIT!