

# Accessing E-Bill Instructions

Southwestern University only sends student account statements electronically as e-bills to your WebAdvisor account. Paper statements are not mailed.

If you need assistance please contact the Business Office at [studentaccounts@southwestern.edu](mailto:studentaccounts@southwestern.edu) or 512-863-1928 or 512-863-1927.

## STUDENT ACCESS

Students will receive an email to their SU email account notifying them when a new statement is available! Students can access their electronic statements through their WebAdvisor account, by clicking on the "View E-Bill & Make a Payment" link located in the Financial Information section. This will take you to your Student Account Payment Portal where you can view e-bills, make payments, enroll in payment plan, and give authorization to other individuals to do these same things. (See next page for instructions on setting up Parent PINS.)

The screenshot shows the Southwestern University Student Account portal. At the top, there is a navigation bar with links: "your account", "view bills", "make payment", "help", and "sign out". Below this is the "Student Account" header, followed by a field for "Student Name".

A red banner reads: "Check your E-Bill & sign up for the SU Payment Plan below!". Below this is a notice: "It is important to make sure that your parent or other authorized individual is set up with a Parent PIN to access your E-bills, to make payments, and to enroll in payment plans. Instructions are located on the Student Account page of the Business Office website."

On the left side, there are several sections with yellow arrows pointing to them:

- Make Pmts.** points to the "Your Account" section, which shows a current balance of \$24,389.00 and a link to "Click here to make a payment".
- Parent Access** points to the "Parent PINs" section, which has an "Add New" link.

On the right side, there are more sections with yellow arrows pointing to them:

- E-Bills** points to the "Your E-Bills" section, which has a "View All" link.
- Payment Plan** points to the "SU Payment Plans" section, which has a link to "Click here to VIEW your SU Fall 2019 Payment Plan".

Other sections include "Holds & Messages", "Your Recent On-line Payments" (with a table of payments), "Scheduled Automatic Payments" (with a table of payments), "Saved Payment Methods" (with a table of methods), and "Account Details & Notification Settings" (with links for "SMS/Text Alert Setup" and "eSignature Disclosure").

Date	Amount	Action
04/10/2019	\$25.69	<a href="#">View</a>
04/02/2019	-\$457.50	<a href="#">View</a>
04/02/2019	\$470.08	<a href="#">View</a>

Next payment	Amount	Action
6/1/2019	Pending	<a href="#">Cancel</a>

Method	Action
Dad ACH	<a href="#">Edit</a> <a href="#">Delete</a>
Mom's CC	<a href="#">Edit</a> <a href="#">Delete</a>

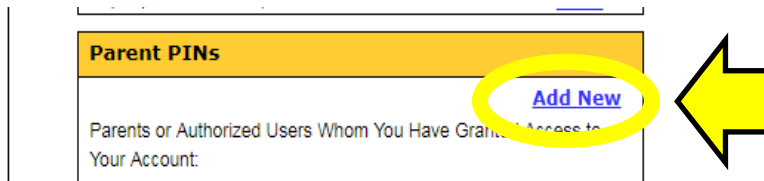
# SETTING UP PARENT ACCESS (This is a 2 step process.)

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

In order for parents or other individuals to receive online access to your student account to view e-bills, to receive alerts, to make on-line payments, and to setup a payment plan, the student must setup the individual 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.
- 3) Don't forget to select the permission to give the person at the bottom of the screen.

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.

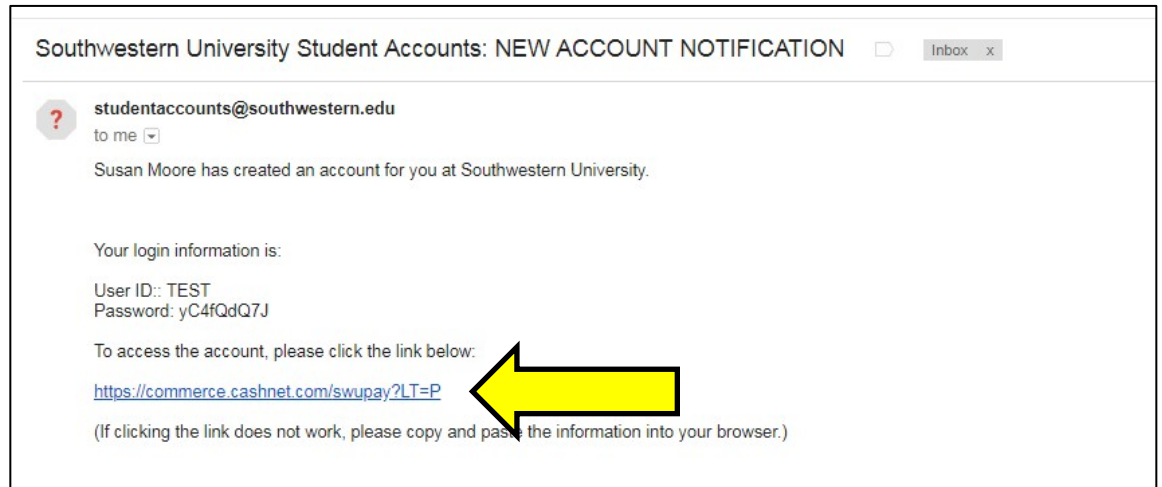
User ID:	Mom *
First Name	Betty *
Last Name	Tom *
Email Address	bettytom@gmail.com *
Confirm Email Address	bettytom@gmail.com *
Relationship to Student	Mom *
Phone Number	512-254-1234
Address Line 1	1001 E University Ave.
Address Line 2	
City	Georgetown
State	TX
Zip	78626
Add a note to the welcome email (optional)	Here is the link to pay my tuition. Thank you!
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
receive Installment Payment Plan email notifications?	<input checked="" type="radio"/> Yes <input type="radio"/> No
be allowed to receive SMS (text message) notifications?	<input checked="" type="radio"/> Yes <input type="radio"/> 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

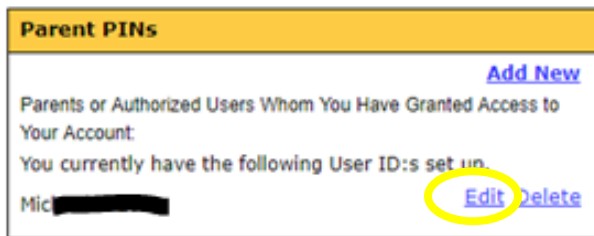
The screenshot shows a form for adding a new parent. The form fields are filled with example data. A large yellow arrow points from the right towards the bottom section of the form, specifically towards the permission options.

- 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.



**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.



**SPECIAL NOTE – If the Parent PIN was set up before April 2019, the student must EDIT the authorized users’ permissions to allow the individuals to “receive Installment Payment Plan email notifications.”**

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?	<input type="text" value="Access &amp; Receive Emails"/>
receive Installment Payment Plan email notifications?	<input type="radio"/> Yes <input checked="" type="radio"/> No
be allowed to receive SMS (text message) notifications?	<input checked="" type="radio"/> Yes <input type="radio"/> No

**CHANGE TO YES**

## 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 a web interface for a "Student Account". At the top, there is a navigation bar with links: "your account", "view bills", "make payment", "Basket", "help", and "sign out". Below this is the "Student Account" header, followed by a field for "Student Name".

The main content area is divided into several sections:

- Your Account:** Shows a "Current Balance" of \$20,630.00. It includes a link "Click here to make a payment" and a note: "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.

Date	Amount	Action
05/23/2017	-\$2.00	<a href="#">View</a>
05/23/2017	-\$2.00	<a href="#">View</a>
05/22/2017	\$2.06	<a href="#">View</a>
- Your Bills:** Lists bills with columns for bill type, date, and a "View" link. Includes a "View All" link.

Bill Type	Date	Action
SWU Bill	04/11/2018	<a href="#">View</a>
SWU Bill	03/20/2018	<a href="#">View</a>
SWU Bill	03/08/2018	<a href="#">View</a>
- Saved Accounts:** States "You have no saved payment methods." with an "Add New" link.
- Account Details:** Shows user information: "User ID: TEST", "Name: Betty Tomm", "Email: bettytom@gmail.com", and "Relationship to Student: parent". It includes links for "Edit", "Change your password", and "SMS Alert Setup".

Yellow callout 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 "Your Recent Payments" table.
- "Access E-Bills" points to the "View" links in the "Your Bills" section.
- "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 in 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.”

**SMS events**

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 an Installment Payment Plan payment is due or late, or if I've been withdrawn from the plan
- When a payment is made on my account

[Cancel](#) [Save](#)

- 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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your account view bills make payment Basket help sign out

**Student Account**

Student Name

**SMS setup**

Select a wireless service provider

Mobile Number

- 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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your account view bills make payment Basket help sign out

**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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