

### LEARN. DO. LIVE.

**Student Accounts Presentation** 

# **Student Accounts**

#### **Our mission:**

- Operate efficiently to provide excellent customer service for students, parents, university departments, and third parties.
- Provide our customers with accurate and timely account information, efficient and secure means to collect and process all payments, refunds, printing and distribution of checks, and recovery of delinquent balances due.
- Ensuring the timely deposit of funds, and safeguarding Central Washington University's assets.

#### **Student Accounts**

Bouillon Hall 110 (509) 963-3546 <u>StudentAccounts@cwu.edu</u>

#### Cashiers

Bouillon Hall 101 (509) 963-2224 cashiers@cwu.edu

Monday – Friday: 8am to 5pm

www.cwu.edu/Student-Accounts

Office of Student Accounts / Bouillon Hall 110 / 509-963-3546 www.cwu.edu/student-accounts



Student Accounts and Cashiers are located on the first floor of Bouillon Hall.



Office of Student Accounts / Bouillon Hall 110 / 509-963-3546

# **Student Accounts - What We Do**

### Answer questions about student accounts

✓ Release of Information Form

### **Billing Statements**

- $\checkmark$  Students emailed weekly if any new activity on account.
- ✓ Paper statements mailed each quarter, after Add/Drop ends. Can make payments before statement is received.
- ✓ Tuition/Fees due  $5^{\text{th}}$  day of classes each quarter.

### 1098t Forms

- ✓ Social Security Number on file with Admissions
- ✓ Updated address on your MyCWU

Assist with Guaranteed Sources & GET funding

### Assist & Advise students with student account holds

# **Cashiers – What We Do**

### **Take Your Payments**

In Person : Check, money order, debit, credit, or cash

- **On-Line :** Credit cards \* (Visa/MasterCard/Discover) & E-checks via Web
- Always identify your payment with your NAME and STUDENT ID#
- ✓ Tuition, Fees & other Course Related Charges
- $\checkmark$  Room and Board
- ✓ Bookstore
- ✓ Recreation Center
- ✓ Library
- ✓ Late Registration & Late Payment Penalties or Fines
- ✓ Student Health Center Service Charges

\*2.85% convenience fee charged by credit card servicer (not CWU) on total amount of payment with all online credit/debit payments.

Office of Student Accounts / Bouillon Hall 110 / 509-963-3546

# Easy steps to utilize your GET FUNDS

- 1. Log into your online GET account.
- 2. Select the account you want to use.
- 3. Choose to "Use Units".



- 4. Review your available unit balance and click "Use Units".
- 5. Tell GET your student is attending CWU and how much money you are requesting. Be sure to select the correct quarter in which you want to use the units. Indicate whether you want the payment to go to "tuition and fees" or "books and supplies".
- 6. Request where you want the funds sent.
  - a. If tuition has not already been paid, you can have the funds sent right to CWU
  - b. If you have already paid the tuition, you can request a reimbursement as the GET account owner.
- 7. Allow up to TWO weeks for GET to process the payment



# Payments / Account Info / 1098-Ts

Holds and To Dos		0 01	Service Outages and Clos	ure	0	0-	Applications			0 0
Holds	To Do List		Outages and Closures				Canvas	Faculty1	180	
			Network Outage for Wenatche	e Center			PeopleAdmin	Connect	tion Card Balanc	ce 🖉
Tasks		0 01	Service Outage at Moses Lake	e Center Wednesday, Dece	mber 2.		TheCIS Dashboards	Qualtric	5	
Task(s) entries found			More				Faculty/Staff Outlook	Student	Outlook	
			Feed -				Disability Services Por	tal SEOIs		
			View All Articles and Sections				Wildcat Career Networ	k CLA On	line	
Add a Task Show A	II/Enhanced		Academic Toolbox		C	0 -	Financial Toolbo	x		0 0
			Class Search	My Academics			Accent/Decline Award	e Account	Incluiny	
			My Enrollment	My Planner			View Einancial Aid	Makaal	Daumont	
			My Academic Requirements	Student Center			VIEW FRIditicial Alu	make a	rayment	
			8-8 Admission Toolbox		0	0 -	Ø Other Links			0
			Accept Admission	Application Status			Advising Resources	Make a Payment (Credit Card)	Make a Pay Check)	ment (
			Evaluate My Transfer Credit	View What-if Report			University Catalog	Classes and Calendars	Dining	
							Health & Wellness	Housing	Scholarship	þ
							A to Z CWU.edu Search	Graduate Studies	SURC	
							Wildcat Shop	Library	Online Form	ns
							ResNet	Report Behaviors of Concern	CWU Servic	ce Des
							Online Learning Resources	Map-Works		

Office of Student Accounts / Bouillon Hall 110 / 509-963-3546



# How to Make a Payment Online

Step 1 – Choose the "Make a Payment" Option in your Financial Toolbox

avorites - Main Menu -			9 				
My Page							
sonalize Content Lavout							
Holds and To Dos	0 0*	Service Outages and Close	ire	0 0+	Applications		0 0
olds	To Do List	Outages and Closures			Canva	Faculty 18	0
-		Network Outage for Wenatchee	e Center		PeopleAn	Connectio	n Card Balance
Tasks	0 0-	Service Outage at Moses Lake	Center Wednesday, Decemb	er 2.	TheCIS Dash ards	Qualtrics	
Task(s) entries found.		More			Faculty/Staff Ou ok	Student O	utlook
		Feed *			Disability Services	al SEOIs	
		View All Articles and Sections			Wildcat Career Netwo	CLA Onlin	e
Add a Task Show All/Er	hanced	Academic Toolbox		0 0 -	Financial Toolbox		0.0
		Class Search	My Academics		Accent/Decline Awards	Accountly	auiou
		My Enrollment	My Planner		View Financial Aid	Make a Pa	vment
		My Academic Requirements	Student Center		The WT Indicial Paid	Makeare	Juenc
		Admission Toolbox		0.0-	Ø Other Links	-	0 0
		Accent Admission	Application Statue	0.01	Advising Resources	Make a Payment	Make a Payment (E
		Evaluate My Transfer Credit	View What-if Report		University Catalog	Classes and Calendars	Dining
					Health & Wellness	Housing	Scholarship
					A to Z CWU.edu Search	Graduate Studies	SURC
					Wildcat Shop	Library	Online Forms
					ResNet	Report Behaviors of Concern	CWU Service Desk
					Online Learning	Map-Works	

Office of Student Accounts / Bouillon Hall 110 / 509-963-3546

<u>www.cwu.edu/student-accounts</u>



# How to Make a Payment Online

Step 2 – Choose the "Make a Payment" Option

Account Alerts	My Account	
No alerts at this time.	Current Account Status	
Announcements	Student Ac ount Balance:	\$124.23
Welcome!! To the new this is how we do things payment system!	Estimated Financial Aid: Balance Including Estimated Aid:	\$33.33 \$90.90
	Make a Payment View Account Activity	
	Term Balances	
	Fall 2015	\$40.90

Office of Student Accounts / Bouillon Hall 110 / 509-963-3546



# How to Make a Payment Online

Step 3 – A Payments Screen will pop up, choose the "Make a Payment" again



Office of Student Accounts / Bouillon Hall 110 / 509-963-3546



# How to Make a Payment Online

Step 4 – Select how you would like to pay (Current account balance, amount due, future due, or by term)

Amount	Payment Method	Confirmation	Payme	ent Receipt	
Colored Deveryoned					
Current account balance	E		\$90.90	\$ 90.90	
Amount due:			\$90.90	\$ 90.90	
Future due:			\$0.00	\$	
Your "future due" amo	ount may not reflect your payment	for charges with due dates i	in the future.		
Your "future due" amo	ount may not reflect your payment	for charges with due dates i	in the future.		
Your "future due" amo	ount may not reflect your payment	for charges with due dates i	in the future. \$40.90	\$ 40.90	
Your "future due" amo Pay by term: Fall 2015 Payment date:	4/22/16	for charges with due dates i	in the future. \$40.90	\$ 40.90	
Your "future due" amo	ount may not reflect your payment	for charges with due dates i	in the future.		

Office of Student Accounts / Bouillon Hall 110 / 509-963-3546



# How to Make a Payment Online

#### Step 5 – Select the Payment Method

count Payn nt Payment	nents Payment History			
count Pay	ment			
Amount	Payment Method	Additional Items	Confirmation	Payment Receipt
elect Paymen Payment amo Payment Met Select Ba *Credit card pa tuition paymen added to your p	t Method bunt: \$90.90 hod: Select Payment Method ack Cancel hyments are handled through Payments t service. A non-refundable service payment.	vPath ®, a ce fee will be		
lectronic Checl umber and acco ersonal checking hecks, i.e. credit	<b>k</b> - Electronic payments require unt number. Payments can be n g or savings account. You canno t cards, home equity, traveler's c	a bank routing nade from a t use corporate checks, etc.		

Office of Student Accounts / Bouillon Hall 110 / 509-963-3546

<u>www.cwu.edu/student-accounts</u>



# How to Make a Payment Online



#### **Step 6 – Enter Account Information**

Amount	Payment Method	Additional Items	Confirmation	Payment Receipt
Select Payment M	lethod			
Payment amoun	t: \$90.90	Accour *Indicat	nt Information les required fields	
Payment Method Select *Credit card paym tuition payment se added to your pay	Electronic Check (checki ents are handled through Pay price. A non-refundable servic meet	ng/savir ▼ Pers credi Do N routi illust e fee will be nume	onal accounts only. N t cards, home equity DT enter debit card i ng number and bank ration shown is only d the routing numbe per on a personal ch	lo corporate accounts, i.e. /, traveler's checks, etc. number. Enter the complete account number. The an example to show where er and bank account eck.
added to your pay	mont.	*Accour	t type:	Select account type 👻
Electronic Check - E number and account personal checking or checks, i.e. credit ca	Electronic payments require a number. Payments can be m savings account. You cannol rrds, home equity, traveler's c	a bank routing ade from a t use corporate hecks, etc. *Bank A	number: xample) ccount number:	
		*Confirm	account number:	
		Billing *Name of	Information on account:	
		Chec	k here for an internation	al address
		*Billing :	address:	
		Billing a	ddress line two:	
		*City:		
		*State/F	rovince:	Select State/Province 🔹
		*Postal	Code:	
		Option	to Save	
		Save	this payment method fo	r future use
		Save pa (e.g. Pri	yment method as: mary Checking)	
		Cont	nue Back Cano	cel



Office of Student Accounts / Bouillon Hall 110/ 509-963-3546



# How to Make a Payment Online

Step 7 – Confirm Payment. Agree to the Terms and Conditions by selecting the check box and then "Submit Payment".



Office of Student Accounts / Bouillon Hall 110 / 509-963-3546



# **Granting Guest User Access**





E-mail address	of the authorized user:		
Would you like to allow this person to view your paymer		nt history and account activity?	$^{\circ}$ No
Continue	Cancel		



# **CWU Payment Plan**



#### NEW

#### CWU Payment Plan

Are you enrolled and have a balance due for the current quarter?

#### Sign-up for a CWU Payment Plan!!!

Payment Plan Quick Facts:

- Helps avoid tuition & housing late fees
- Easy enrollment via MyCWU
- · Three installments instead of one
- Helps keep your account current
- Enrollment limited to the 5th-9th day of instruction each quarter

Open enrollment: Between the 5<sup>th</sup> and 10<sup>th</sup> day of any quarter.

Allows you to split up payments into three portions rather then paying all at once.

This brochure is available online at <a href="http://www.cwu.edu/student-accounts/">www.cwu.edu/student-accounts/</a>

Office of Student Accounts / Bouillon Hall 110 / 509-963-3546



Direct Deposit
 Tuition & Fees

Housing & Dining

Student Insurance Veterans

MyCWU

Financial Aid Registrar

1098T Tax Credit Info

**Rights and Responsibilities** 

RELATED LINKS

# How to set up a Payment Plan Online

Step 1: Navigate to the Payment Plan link on the Student Accounts webpage



#### If you are already an authorized user, and wish to pay AS AN AUTHORIZED USER Click here.

If you are not an authorized user on MyCWU, you can become a guest user. Click here to see a step-by-step guide showing your student how to assign a guest user to their profile.

#### **Current and Non-Current Students:**

#### Make a payment

\*\*CWU does not accept payments over the phone.\*\*

\*\* In order to make a payment, you may have to <u>enable cookies in your internet browser's privacy</u> <u>settings</u>.\*\*

\*\* Having trouble signing in? You may need to clear your cache.\*\*

#### Office of Student Accounts / Bouillon Hall 110 / 509-963-3546

# **Payment Plan**

#### Step 2 - Click to pay the enrollment fee

**Student Accounts** 

CWU Home » Student Accounts » Payment Plan

#### FAQs Tax Credits GET Funding • Third Party Sponsors Forms • Perkins Loans Student Insurance

Student Insurance New Freshman Orientation Payment Plan

Veterans

How is our service? Contact Us

#### **RELATED LINKS**

MyCWU Financial Aid Registrar Scholarships Student Employment



#### **Payment Plan**

Did you know that Central Washington University has a payment plan option for students that allows you to spread payments for tuition and other charges over the entire quarter? Check it out!

#### Summer Payment Plan

Open registration: June 21-June 26 for the Summer Quarter Payment Plan on MyCWU. **Enrollment is optional.** The \$50 enrolling ent fee must be paid in advance prior to enrolling in the payment plan.

To pay the enrollment fee, Click Here.

After enrolling, your Summer Quarter charges will be divided into three installments – due by June 26, July 26, and August 25.

#### Office of Student Accounts / Bouillon Hall 110 / 509-963-3546

# **Payment Plan**

Step 3 -

#### **Payment Plan Enrollment Fee**

Home | Payment Plan Enrollment Fee



Signing up for the payment plan allows students to divide their quarterly charges into 3 installments due the 15th of each month in the quarter (due 25th of month for Summer Quarter). Enrollment in the payment plan requires a \$50 enrollment fee, which is non-refundable. If you sign up for the payment plan in error, this fee can be applied to past or future due charges.

To be eligible for the payment plan, the student must be enrolled for the current quarter and the student account must be current with no past due charges.

- 1. Pay \$50 Enrollment Fee
- 2. auto-enrolled in payment plan by end of next business day
- 3. email notification of successful enrollment in payment plan

Price:

\$50.00



Office of Student Accounts / Bouillon Hall 110 / 509-963-3546

# Payment Plan

After you have paid the \$50 enrollment fee, the student will receive a confirmation email. Please allow 1-2 business days for processing before the payment plan installments will be viewable on the account.

The installments are due on the 15<sup>th</sup> of each of the three months included in the quarterly plan (except summer—the dates are different). If an installment is unpaid on the 16<sup>th</sup> of the month, a \$20 late fee will be charged to the account.



1098T Tax forms become available at the end of January. You can retrieve yours on your MyCWU, Account Inquiry in the Financial Toolbox.



Office of Student Accounts / Bouillon Hall 110 / 509-963-3546

# 1098T Form

**Step 1 – Choose the Account Services Tab** 



Office of Student Accounts / Bouillon Hall 110 / 509-963-3546

# 1098T Form

#### Step 2 – Choose the 1098t Tax Form tab

Account Inquiry	Electronic Payments/Purchases	Account Services
enroll in payment plan	1098t tax form	student permission

#### View 1098-T

Years listed indicate which 1098-T statements are available for you to access. Please note that the Printed Date will only be visible for years you received a paper copy. Click the Tax Year hyperlink to view the 1098-T Tuition Statement. To view the details, click the Box Amount Tab. View the details by clicking on the hyperlink on the Amount field.

#### Note:

If you use a pop up blocker, you will have to disable it to display your 1098-T.
 If there is no hyperlink for the amounts, detail information is not available. Please contact your Bursar's office should you need more information.

View 1098-T							
General	Box <u>A</u> mount						
Tax Year	Version	Federal Tax ID	Institution	Printed Date	Transmittal Date		
2014	Original	916000618	Central Washington University	01/27/2015	03/30/2015		
2013	Original	916000618	Central Washington University	03/21/2014	08/28/2014		



Account inquiry electronic rayments/rurchases Account Service	Account Inquiry	Electronic	Payments	/Purchases	Account	Services
---	-----------------	------------	----------	------------	---------	----------

Enroll In Payment Plan 1098t Tax Form Student Permission

go to ... 🔻 📎

Office of Student Accounts / Bouillon Hall 110 / 509-963-3546

# 1098T Form

Step 3 – Indicate that you consent to receive your 1098-T information online instead of a paper form in the US Mail by checking "Yes, I have read the agreement" box. Click Submit.

1098-T Consent

### 1. 1098-T Consent Agreement

I agree to receive my 1098-T Tax form electronically through on-line access. Clicking the 'Yes, I have read the agreement' checkbox means you will no longer receive the 1098-T form via US mail. Click the Submit push button to always access your 1098-T on-line. Click the Cancel push button to return to the 1098-T Year selection.

The agreement is dated: 01/10/2014

Yes, Ihave read the agreement

CANCEL SUBMIT

Office of Student Accounts / Bouillon Hall 110 / 509-963-3546



Step 4 - Review your confirmation page and click the "View 1098-T Section" button to view your 1098-T Information



Office of Student Accounts / Bouillon Hall 110 / 509-963-3546

# **Important Due Dates**

- **Tuition** : by the 5<sup>th</sup> day of class
- **Room & Board** : according to your housing contract
- **Bookstore Charges** : when they post to your account
- **Parking Charges** : when they post to your account
- Health Center Charges : when they post to your account
- Library Charges : when they post to your account
- Miscellaneous Charges : when they post to your account

# Authorization of Payment Form

Financial Aid can only automatically pay the following things

- Tuition
- Fees
- Room
- Board

But there are lots of things that can be charged to your account

- ✓ Bookstore Charges
- ✓ Recreation Center Charges
- ✓ Library Fees
- ✓ Parking Permits & Tickets
- ✓ Late Registration & Late Payment Penalties or Fines
- ✓ Student Health Center Service Charges

Completing the Payment Authorization Form will make it so that your financial aid can pay towards all charges on your account



# **Direct Deposit Option for Refunds**

**Students** enroll in Direct Deposit online, through their MyCWU self-service on their Student Dashboard:



Parents can enroll in Direct Deposit also, specifically to receive PLUS Loan credit balance refunds. The Parent Direct Deposit Form is available on the Student Accounts website.

Office of Student Accounts / Bouillon Hall 110 / 509-963-3546

# **Tuition Refunds and Payroll Checks**

- Financial Aid overpayments are refunded on approximately the 10<sup>th</sup> day of class
- Mailed refunds go to Mailing/Home address in MyCWU If students enroll in direct deposit for refunds, the refund will be direct deposited; otherwise we will mail a check.
- Parent loans refunded by mail or by direct deposit.

If you pay more than the charges on your account (overpayment), you must *request* a refund of your credit balance.

# Helpful Hints For Your Success



- 1. Keep yourself informed
- 2. Check MyCWU/CWU emails regularly
- Remember: It's your responsibility to keep your address and phone numbers current
- Don't wait for a statement to pay your charges – check MyCWU and make a payment
- 5. Sign and turn in important forms
  ✓ Financial Aid Authorization Form
  - Direct Deposit Form
  - Release of Information Form

# CMU LEARN.

**Questions**?

Office of Student Accounts / Bouillon Hall 110 / 509-963-3546