



Billing, Waivers, Financial Aid and More

James Gaeta

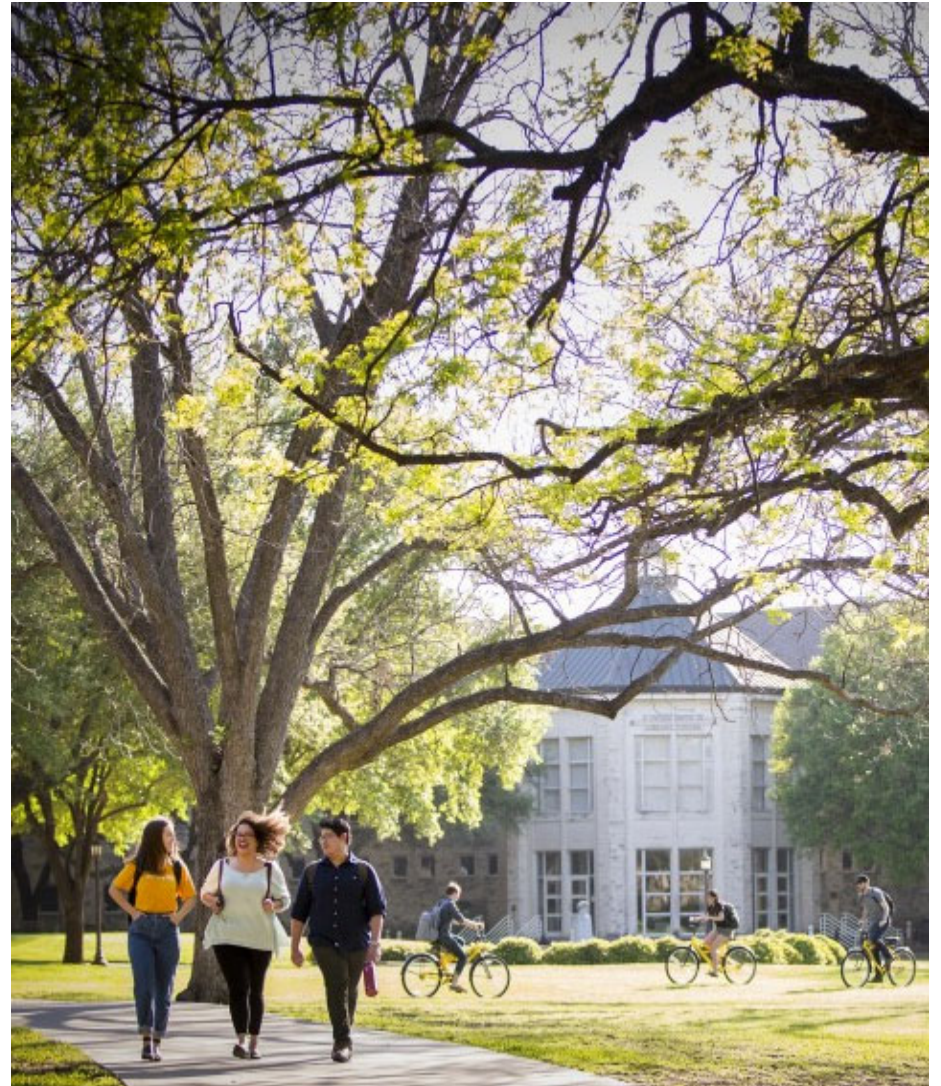
Associate Dean of Enrollment Services

Loretta Waclawczyk

Assistant Controller

Susan Moore

Accounts Receivable Specialist II





SPROG DAY

Session Overview

- Accessing Info Online
- Financial Aid – Next Steps
- Renewing Financial Aid
- Parent Access to Student Information
- Billing, Payment and Insurance



SPROG DAY

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



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PIRATE CARD

RESOURCES & TOOLS



A Future Full of Promise

Southwestern University announces its 2021–2026 Tactical Plan.



Southwestern University Named a Best Value College for 2022 by The Princeton Review

SU is one of 209 schools chosen for this list.



Two Seniors Receive Fulbright Awards for 2022–2023

Catherine Hiebel '22 and Melina Boutris '22 will teach English in Spain and Austria, respectively.



G.H.O.S.T. Unit Takes Theater to New Dimensions at Southwestern

What happens when you start a devised theater project with three Southwestern University students and the Anton Chekov play, *The Cherry Orchard*? You end up with a nationally recognized production called G.H.O.S.T. Unit: *The Live Event*.



Watch: Highlights from Commencement Convocation 2022



Southwestern University Announces Cassandra M. McZeal '92 as 2022 Commencement Speaker

The applied mathematician and Southwestern alumna will address the graduating class.



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SOUTHWESTERN UNIVERSITY

Scholarships & Financial Aid

At Southwestern, we're committed to ensuring that students from all income levels who wish to pursue their education with us have access to a variety of financial opportunities.





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 Gmail	 Campus Notices	 Moodle
 Self-Service	 WebAdvisor	 Pirate Card

Student Support

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Faculty & Staff Support

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Administrative Links


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SU Links

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Student's Self Service Account





 SOUTHWESTERN UNIVERSITY


 moores  Sign out  Help


Hello, Welcome to Colleague Self-Service!
Choose a category to get started.


Notifications


Title	Details	Link
 Documents Required	There are 4 requests from your institution that require your action.	View required documents


 **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. Direct deposit information entered here is only for accounts payable payments (reimbursements, refunds, etc). For payroll direct deposit changes, please contact Loretta Wacławczyk at waclawcl@southwestern.edu.


 **Employee**
Here you can view your tax form consents, earnings statements, banking information, timecards and leave balances.

 **Student Planning**
Here you can search for courses, plan your terms, and schedule & register your course sections.

 **Course Catalog**
Here you can view and search the course catalog.

 **Grades**
Here you can view your grades by term.

 **Graduation Overview**
Here you can view and submit a graduation application.

 **Academic Attendance**
Here you can view your attendances by term.

Welcome to Financial Aid!

Use Colleague Self-Service Financial Aid to assist in managing your Financial Aid package from submission to completion.



Ms. Isabella E. Hernandez
 Colleague ID: [\[redacted\]](#)
[Change User](#)

Notifications 0

Select an Award Year:

 [Contact Financial Aid Office](#)



You have missing documents!

In order to complete your financial aid application some additional documentation is required before the Financial Aid office can evaluate your information.

[Complete required documents](#)


Checklist

- | | | |
|---|---------------|--|
| ✓ | Completed | Submit a Free Application for Federal Student Aid (FAFSA) |
| ⚠ | Action Needed | Complete required documents |
| ⓘ | Not Available | Your application is being reviewed by the Financial Aid Office |
| ⓘ | Not Available | Review and accept your Financial Aid Award Package |
| ⓘ | Not Available | Complete Direct Loan Entrance Counseling |




Resources

Helpful Links


- [Sub/Unsub Master Prom Note](#)
- [FAFSA Application](#)
- [PLUS Loan Application](#)
- [NSLDS Information](#)



SOUTHWESTERN UNIVERSITY

 Account
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Daily Work · Financial Aid · Financial Aid Home (Admin)



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Helpful Links
Sub/Unsub Master Prom Note
FAFSA Application
PLUS Loan Application

- [Financial Aid Home \(Admin\)](#)
- [Required Documents \(Admin\)](#)
- [My Awards \(Admin\)](#)
- [Report/View Outside Awards \(Admin\)](#)
- [Request a New Loan \(Admin\)](#)
- [Offer Letter \(Admin\)](#)
- [College Financing Plan \(Admin\)](#)
- [Correspondence Option \(Admin\)](#)
- [Satisfactory Academic Progress \(Admin\)](#)

Academic Year ▼


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Daily Work · Financial Aid · Required Documents (Admin)

Required Financial Aid Documents

Be sure to submit ALL required documents before their due date to make sure your Financial Aid package is not delayed.



Ms. Barbara G. Fernández


Colleague ID: [XXXXXX]










[Change User](#)

Notifications 0

Select an Award Year: 2023-24 Academic Year
✉ [Contact Financial Aid Office](#)


[View All Required Documents](#)

Document	Explanation	Due Date	Status	Attachments
Texas Residency Form	The Texas Residency Form must be submitted by students who are receiving any state aid, including, but not limited to a Tuition ... more Texas Residency Form			<div style="border: 1px solid #0070c0; border-radius: 15px; padding: 2px 10px; display: inline-block;">  Manage 0 </div>

-  Financial Aid Home (Admin)
-  Required Documents (Admin)
-  My Awards (Admin)
-  Report/View Outside Awards (Admin)
-  Request a New Loan (Admin)
-  Offer Letter (Admin)
-  College Financing Plan (Admin)
-  Correspondence Option (Admin)
-  Satisfactory Academic Progress (Admin)


Financial Aid Home (Admin)
 Welcome! We are here to assist in managing your Financial Aid package from submission to completion.

 [Contact Financial Aid Office](#)

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[Complete required documents](#)

Checklist	
✓ Completed	Submit a Free Application for Federal Student Aid (FAFSA)
⚠ Action Needed	Complete required documents
🕒 Not Available	Your application is being reviewed by the Financial Aid Office
🕒 Not Available	Review and accept your Financial Aid Award Package

Resources
Helpful Links
Sub/Unsub Master Prom Note
FAFSA Application
PLUS Loan Application



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[Home](#) | [Daily Work](#) | [Financial Aid](#) | [My Awards](#) | [Profile](#) | [Sign out](#) | [Help](#)

Daily Work | Financial Aid | My Awards

My Awards

You can accept or decline awards, and update your loan amounts.



Hello, **Christopher H. Cunningham**
Colleague ID: [REDACTED]
 Chapter User

Notifications 0
▼

Select an Award Year: 2022-23 Academic Year
Contact Financial Aid Office

You have the following Awards

Your award package assumes you will be enrolled full-time. If you enroll less than full-time, the financial aid you actually receive may be less than what is stated here. Please contact your Financial Aid counselor if you have questions about your enrollment status.

Award	Status	Total Awarded Amount	Fall 2022	Spring 2023
<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;"> 54% </div> <div> <p style="margin: 0; font-size: 0.9em;">Scholarships and Grants</p> <p style="margin: 0; font-size: 0.8em;">Money you don't have to pay back</p> </div> <div style="margin-left: 20px; font-weight: bold; font-size: 1.1em;">\$34,190.00</div> </div>				
Mood Scholar Award View award	Accepted	\$26,000.00	\$13,000.00	\$13,000.00
Tuition Equalization Grant View award	Pending Acceptance	\$3,497.00	\$1,749.00	\$1,748.00
William Randolph Hearst Scholarship View award	Pending Acceptance	\$2,611.00	\$1,306.00	\$1,305.00
William & Abbie Allen Scholarship View award	Accepted	\$2,082.00	\$1,041.00	\$1,041.00
<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;"> 46% </div> <div> <p style="margin: 0; font-size: 0.9em;">Loans</p> <p style="margin: 0; font-size: 0.8em;">Money you have to pay back</p> </div> <div style="margin-left: 20px; font-weight: bold; font-size: 1.1em;">\$29,560.00</div> </div>				



SOUTHWESTERN Profile Sign out Help

Award	Status	Total Awarded Amount	Fall 2022	Spring 2023
Mood Scholar Award View award	Accepted	\$26,000.00	\$13,000.00	\$13,000.00
Tuition Equalization Grant View award	Pending Acceptance	\$3,497.00	\$1,749.00	\$1,748.00
William Randolph Hearst Scholarship View award	Pending Acceptance	\$2,611.00	\$1,306.00	\$1,305.00
William & Abbie Allen Scholarship View award	Accepted	\$2,082.00	\$1,041.00	\$1,041.00

Loans
Money you have to pay back **\$29,560.00** 46%

Award	Status	Total Awarded Amount	Fall 2022	Spring 2023
Subsidized Loans Accept or Decline	Pending	\$3,500.00	\$1,750.00	\$1,750.00
Unsubsidized Loans Accept or Decline	Pending	\$2,000.00	\$1,000.00	\$1,000.00
Parent PLUS Loans Accept or Decline	Pending	\$24,060.00	\$12,030.00	\$12,030.00

Award Total

Award	Total Awarded Amount	Fall 2022	Spring 2023
Total Awards Accept or Decline All	\$63,750.00	\$31,876.00	\$31,874.00

Loan Requirements Checklist

- ⚠ Incomplete [Complete Direct Loan Entrance Counseling](#)
- ⚠ Incomplete [Sign a Direct Loan Master Promissory Note](#)



SPROG DAY

Financial Aid – Next Steps

■ Disbursement Dates

- Fall: August 18, 2023
- Spring: January 8, 2024

■ Merit Scholarships

- No additional steps needed

■ Verification

- List of required documents available on Self Service
- Priority deadline: June 15, 2023, but documents still accepted
- Must be completed before funds can be disbursed

SPROG DAY

Financial Aid – Next Steps

■ Tuition Equalization Grant

- Texas Residency Form - due June 26, 2023
- 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

SPROG DAY

Financial Aid – Next Steps

■ Thank you notes

- Thank You note request email sent from
April Hampton Perez (pereza@southwestern.edu)
- For named scholarships/grants from SU
- Due date June 26, 2023

■ Truman J. Odiorne Scholarship

- Odiorne residency form
- Thank-you note
- Due date June 26, 2023



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 26, 2023

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 26, 2023**



SPROG DAY

Financial Aid – Next Steps

■ Private Loans

- Contact Lender for application information
- Private loan lender list available on Financial Aid Website
- Complete by June 26, 2023

■ 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 26, 2023



SPROG DAY

Renewing Financial Aid

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



SPROG DAY

Renewing Financial Aid

- **File FAFSA each year**
 - Required for renewing most financial aid, including loans
 - FAFSA available in December 2023
 - 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.



SPROG DAY

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



- Home
- Financial Information
- Employment
- Academics
- Daily Work
- User Options**
- User Profile
- Emergency Information
- View/Add Proxy Access
- Required Documents
- Required Agreements

Hello, Welcome to Colleague Self-Service!

Choose a category to get started.

- Student Finance**
Here you can view your latest statement and make a payment online.
- Tax Information**
Here you can change your consent for e-delivery of tax information.
- Employee**
Here you can view your tax form consents, earnings statements, banking information, timecards and leave balances.
- Course Catalog**
Here you can view and search the course catalog.
- Graduation Overview**
Here you can view and submit a graduation application.
- Advising**
Here you can access your advisees and provide guidance & feedback on their academic planning.



Home

Financial Information ▾

Hello, Welcome to Colleague Self-Service!
Choose a category to get started.

User Options ▾ View/Add Proxy Access

View/Add Proxy Access

i All proxies must first be listed as a relation to the student and have a valid email address to be granted access. If you do not see the person you want to add as a proxy, please send an email to aso@southwestern.edu. Include the individual's full first and last names, their mailing address, email address, phone number, and relationship to you (i.e. parent/step-parent/guardian, etc.).

i It may take up to 48 hours to update the system.

This is for proxy access to the student's financial aid, grades and/or notifications only. To set up proxy access to view e-bill, make on-line payments and/or set up a payment plan access please go to your CashNet Payment Portal. Directions on accessing and setting up your a parent pin for the Payment Portal, see [Business Office/Student Accounts Information](#) on the SU website.

Active Proxies

i You do not have any designated proxies. Add one now to allow another self-service user to view or edit your account.

Add a Proxy

i I understand that anyone I add as a proxy will be able to see any information on the pages for which I provide access. This proxy access may take up to one hour after assignment to be available to the proxy. I also authorize University personnel to discuss the details of my student account and financial aid with my proxy. I understand that I can remove proxy access to a relation at any time through Self-Service.

Select a Proxy

Please Select ▾

Required Documents

Required Agreements

Advising
Here you can access your advisees and provide guidance & feedback on their academic planning.



i I understand that anyone I add as a proxy will be able to see any information on the pages for which I provide access. This proxy access may take up to one hour after assignment to be available to the proxy. I also authorize University personnel to discuss the details of my student account and financial aid with my proxy. I understand that I can remove proxy access to a relation at any time through Self-Service.

Select a Proxy
[Dropdown menu]

Email Address [Text field] Relationship [Text field]

Access

Allow Complete Access
 Allow Select Access

<input type="checkbox"/> Student Finance i	<input type="checkbox"/> Financial Aid i
<input type="checkbox"/> Account Activity	<input type="checkbox"/> Offer Letter
	<input type="checkbox"/> Financial Aid Home
	<input type="checkbox"/> My Awards
	<input type="checkbox"/> FA Outside Awards
	<input type="checkbox"/> FA Required Documents
	<input type="checkbox"/> Satisfactory Academic Progress
	<input type="checkbox"/> College Financing Plan
<input type="checkbox"/> General i	<input checked="" type="checkbox"/> Academics i
<input type="checkbox"/> Notifications	<input checked="" type="checkbox"/> Grades
<input type="checkbox"/> Required Documents	
<input type="checkbox"/> Tax Information i	
<input type="checkbox"/> Tax Information	



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Self Service/Proxy Access Issues

- 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 – 4:30 pm tomorrow
- Link to make appointment sent to SU email account



Billing Information

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Southwestern University Announces Cassandra M. McZeal '92 as 2022 Commencement Speaker

The applied mathematician and Southwestern alumna will address the graduating class.



Southwestern University Student Honored as Newman Civic Fellow

Eugenia Agobe '23 recognized for commitment to solving public problems



Southwestern Students Receive Gilman International Scholarship to Study Abroad

Sierra Burton '22 and Suleman Khan '25 will use scholarship money to study in Europe and Japan.



Scholarship, Service, and Sisterhood

The Upsilon Alpha chapter of Alpha Kappa Alpha, Incorporated®, continues the rich legacy of the nation's first historically Black sorority.



Southwestern University Receives STARS Gold Rating for Sustainability Achievements

STARS, the Sustainability Tracking, Assessment & Rating System measures and encourages sustainability in all aspects of higher education.



SU has Earned 2021 Distinction Through the Tree Campus Higher Education Program for the Fifth Year in a Row

Southwestern University shows a dedication to including green spaces on campus as they have proven to benefit students.



STUDENT ACCOUNTS

Accessing Student Account Information

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

Sprog Billing Information Presentation - June 2022

2023-2024 Key Financial Dates and Deadlines

Billing Schedule & Due Dates

SEMESTER	E-BILL AVAILABILITY DATES	PAYMENT DUE DATE
Summer 2023	E-Bills released April 19, 2023	May 5, 2023
	Returning Students E-bills - April 25, 2023	
Fall 2023	Returning Students Reminder E-bills June 30, 2023	July 14, 2023
	New Students - E-Bill received after registration	
Spring 2024	E-bills released Nov. 10, 2023	Dec. 8, 2023



Fall 2023 Dates

At Sprog	Register for classes.
6/30/23	Fall 2023 E-bills Released in Transact Payments Portal.
7/13/23	All waivers due.
7/14/23	Fall 2023 Tuition Due or Enroll in Payment Plan.
7/24/23	\$100 Late Fee Assessed on Unpaid Balances.
Fall Move In	Balance must be paid or student is not allowed to move in & classes may be cancelled.



Spring 2024 Dates

11/10/23	Spring 2024 E-Bills Released in Transact Payments Portal.
12/07/23	Spring 2024 Vehicle Waiver Due.
12/08/23	Spring 2024 Tuition Due or Enroll in Payment Plan.
12/18/23	\$100 Late Fee Assessed on Unpaid Balances.
1/10/24	Students with unpaid Spring Balances must move out of housing & Spring classes will be cancelled.

Payment Options

■ Online via Transact Payments Portal

- Credit Cards – 2.75% 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

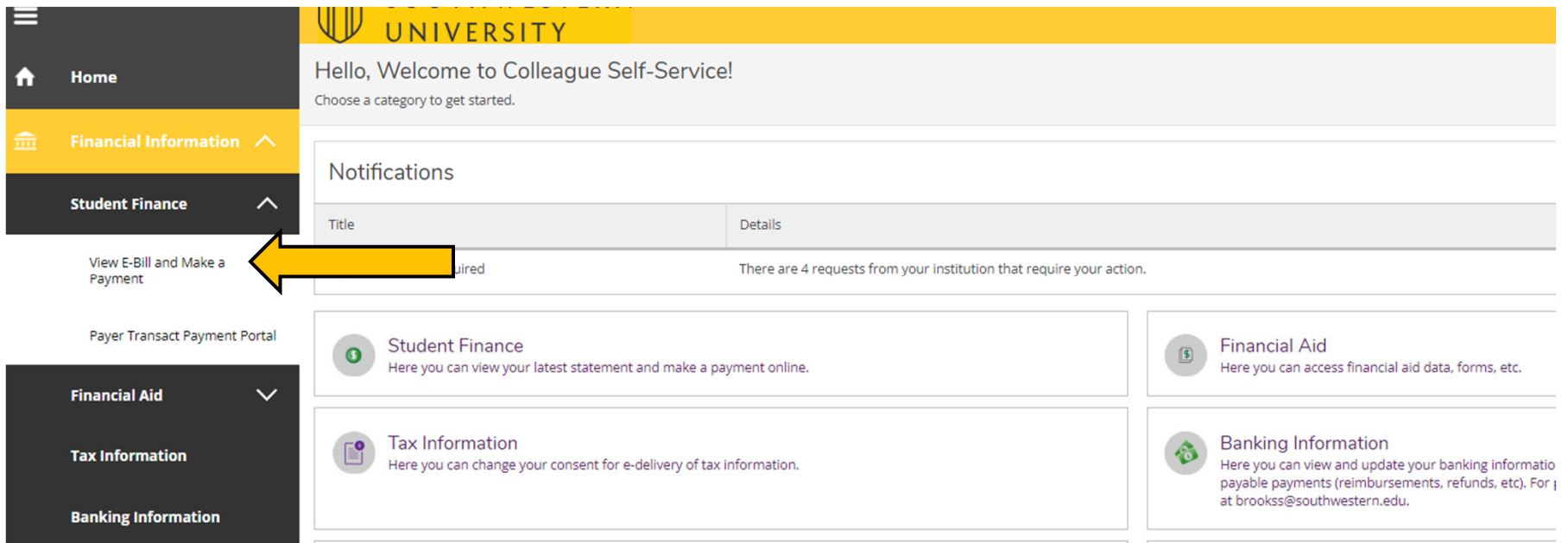
■ By Mail

- 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



UNIVERSITY

Hello, Welcome to Colleague Self-Service!
Choose a category to get started.

Notifications

Title	Details
View E-Bill and Make a Payment	Required
There are 4 requests from your institution that require your action.	

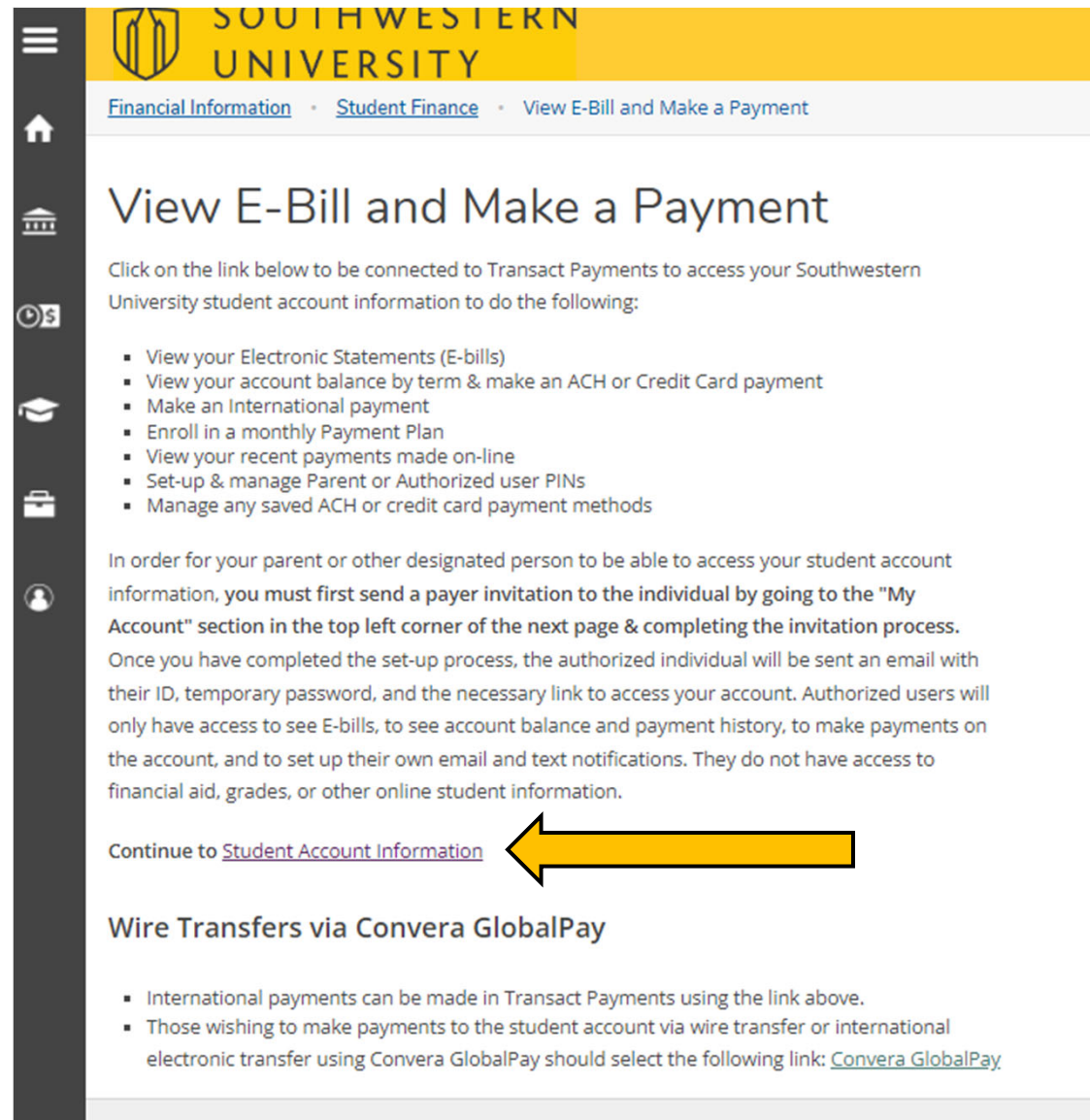
Student Finance
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Financial Aid
Here you can access financial aid data, forms, etc.

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 for payable payments (reimbursements, refunds, etc). For help contact Brookss at brookss@southwestern.edu.

Continue To Access Transact Payments Portal



SOUTHWESTERN UNIVERSITY


[Financial Information](#) · [Student Finance](#) · [View E-Bill and Make a Payment](#)

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

- My Account
- Overview**
- Payment Plans
- Make a Payment
- Transactions
- Statements
- Help
- Sign Out

SN Student Name

Balance
\$18,594.67

Summary

[View statements](#)

(Fall 2023)

\$18,594.67

Balance

\$18,594.67

Payment plans









[View](#)



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](#)

-  My Account
-  Overview
-  Payment Plans
-  Make a Payment
-  Transactions
-  Statements
-  Help
-  Sign Out



[View](#)



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

[View all](#)

Date	Description	Receipt	Amount
4/10/23	23_SP: 23 Spring Special Payment Plan A	#87072	\$1,063.59
3/10/23	23_SP: 23 Spring Special Payment Plan A	#86354	\$1,063.58

[Make a payment](#)

- My Account**
- Overview
- Make a Payment
- Transactions
- Statements
- Sign Out

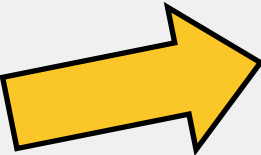


Do you want help paying?

Do you know someone that would like to help you pay? Invite them to have access to your account!

[Send a payer invitation](#)

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.




Student Name

Southwestern University

Basic information


Name	Student Name
Student ID	250XXXX

Payment methods

Parents Checking (*****3439)	
+ Add payment method	

Payers

Do you know someone that would like to help you pay? Invite them to have access to your account!

Authorized User's Name	
+ Send a payer invitation	

Contact information

Email address	Student@southwestern.edu
Phone number	512-818-1234
Mailing address	123 Pirate's Cove Georgetown, TX 78626

SMS notifications

512-818-1234	
--------------	---

Privacy & terms



Profile

Payer Invitation

Payer information

* First name

* Last name

* Email address

* Confirm email address

Payer access

Allow access to statements

Message to payer

Maximum 250 characters

Cancel

Send invitation

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.



SOUTHWESTERN UNIVERSITY

User name ⓘ

Password

Sign in

[Forgot password](#)
[Pay as a guest](#)

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>

Overview



Parent

Southwestern University

Balance

\$24,225


Student: Student Name



[View a different student](#)

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





Student link

You will login with the information for your other student. Can use temporary password if you were just invited.

Link to another student

Enter the user name and password that you use to sign into another student's account at Southwestern University.

*** User name**

 *User name required*

*** Password**

 *Password required*

Cancel

Continue

Viewing E-Bills/Statements

- My Account
- Overview**
- Payment Plans
- Make a Payment
- Transactions
- Statements
- Help
- Sign Out

SN Student Name

Balance
\$18,594.67

Summary

[View statements](#)

(Fall 2023)

\$18,594.67

Balance

\$18,594.67

Payment plans

[View](#)


















Need to enroll in a payment plan?

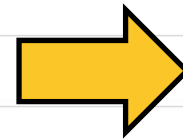
Enrolling in a payment plan takes just a few minutes and can help you spread out payments on your education expenses.

[View payment plan options](#)

Statements

-  My Account
-  Overview
-  Payment Plans
-  Make a Payment
-  Transactions
-  **Statements**
-  Help
-  Sign Out

Date	Description		View	Save
5/3/23	SWU Bill			
4/24/23	SWU Bill			
1/17/23	SWU Bill			
12/1/22	SWU Bill			
11/10/22	SWU Bill			
8/10/22	SWU Bill			



Sample Fall 2023 E-bill/ Statement



1001 E. University Ave.
Georgetown, TX 78626
512-863-1928
studentaccounts@southwestern.edu

Student Name
1234 Lookout Cove
Georgetown, TX 78626

PAYMENT SUMMARY

Statement Date:	07/03/23
Student ID:	[REDACTED]
Due Date:	07/14/23
TOTAL AMOUNT DUE:	\$18,594.67

PAYMENT OPTIONS:

In Person – At Business Office, located on first floor of Cullen Building
By Mail – P.O. Box 770, Georgetown, TX 78627 (include Student ID number on check)
On-line – Students use "Make a Payment" link on WebAdvisor. Parents go to <https://commerce.cashnet.com/swupay> & log on using their account information sent to them by their student.

If you are mailing a payment, include the top portion. Keep the lower portion for your records.

IMPORTANT INFORMATION

Fall Balances are due Friday, July 14. Waivers are due July 13. The waivers can be found at: <https://www.southwestern.edu/business-office/student-accounts/waivers-for-optional-charges/>

DATE	STATEMENT ACTIVITY	CHARGES	CREDITS
07/01/23	*** Balance Forward ***		-\$446.83
07/01/23	Registration - 23/FA	\$25,279.00	
07/01/23	Housing - 23/FA	\$5,701.00	
07/01/23	5 Meals/week	\$984.50	
07/01/23	\$100 Pirate Bucks	\$100.00	
07/01/23	23/FA Vehicle Registration	\$100.00	
07/01/23	2023-24 Dewar Tuition Refund	\$555.00	
07/01/23	2023-24 Student Health Insuran	\$2,465.00	
07/01/23	23/FA Student Service & It Fee	\$150.00	
07/03/23	23/FA Waive Dewar Refund Ins		-\$555.00
07/03/23	23/FA Waive Student Health Ins		-\$2,465.00
Subtotal:			\$31,867.67

CONFIRMED FINANCIAL AID

McKenzie Scholar Award	\$12,250.00
Federal Pell Grant	\$1,023.00

Confirmed Financial Aid: **\$13,273.00**

AMOUNT DUE **\$18,594.67**

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 \$25,279
Lab Fees = \$75**

**Total of 2
Registration Lines
= \$25,279**

Financial Aid Needing Attention Example

NOTE – ACTION IS NEEDED to move items from “Needing Attention” Section to “Confirmed Aid” Section.



1001 E. University Ave.
Georgetown, TX 78626
512-863-1928
studentaccounts@southwestern.edu

Student Name
1234 Lookout Cove
Georgetown, TX 78626

PAYMENT SUMMARY	
Statement Date:	07/03/23
Student ID:	[REDACTED]
Due Date:	07/14/23
TOTAL AMOUNT DUE:	\$18,594.67

PAYMENT OPTIONS:	
In Person –	At Business Office, located on first floor of Cullen Building
By Mail –	P.O. Box 770, Georgetown, TX 78627 (include Student ID number on check)
On-line –	Students use “Make a Payment” link on WebAdvisor. Parents go to https://commerce.cashnet.com/swupay & log on using their account information sent to them by their student.

If you are mailing a payment, include the top portion. Keep the lower portion for your records.

IMPORTANT INFORMATION

Fall Balances are due Friday, July 14. Waivers are due July 13. The waivers can be found at:
<https://www.southwestern.edu/business-office/student-accounts/waivers-for-optional-charges/>

DATE	STATEMENT ACTIVITY	CHARGES	CREDITS
07/01/23	*** Balance Forward ***		-\$446.83
07/01/23	Registration - 23/FA	\$25,279.00	
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07/01/23	5 Meals/week	\$984.60	
07/01/23	\$100 Pirate Bucks	\$100.00	
07/01/23	23/FA Vehicle Registration	\$100.00	
07/01/23	2023-24 Dewar Tuition Refund	\$555.00	
07/01/23	2023-24 Student Health Insuran	\$2,465.00	
07/01/23	23/FA Student Service & It Fee	\$150.00	
07/03/23	23/FA Waive Dewar Refund Ins		-\$555.00
07/03/23	23/FA Waive Student Health Ins		-\$2,465.00

Subtotal: \$31,867.67

CONFIRMED FINANCIAL AID	
McKenzie Scholar Award	\$12,250.00
Federal Pell Grant	\$1,023.00

Confirmed Financial Aid: \$13,273.00

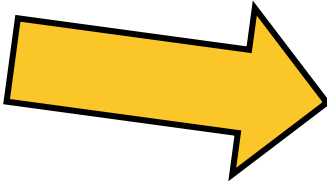
AMOUNT DUE \$18,594.67

FINANCIAL AID NEEDING ATTENTION	
Truman J. Odiome Endowed Schol	\$201.00
Tuition Equalization Grant	\$1,749.00

FINANCIAL AID NEEDING ATTENTION: \$1,950.00

Sample E-bill with Verification

NOTE – If your Financial Aid is still in verification, federal aid will NOT appear on the e-bill, but this message will appear.



Southwestern University ENGAGING MINDS. TRANSFORMING LIVES.

1001 E. University Ave.
Georgetown, TX 78626
512-863-1928
studentaccounts@southwestern.edu

Student Name
1234 Lookout Cove
Georgetown, TX 78626

PAYMENT SUMMARY	
Statement Date:	07/03/23
Student ID:	[REDACTED]
Due Date:	07/14/23
TOTAL AMOUNT DUE:	\$16,857.49

PAYMENT OPTIONS:	
In Person –	At Business Office, located on first floor of Cullen Building
By Mail –	P.O. Box 770, Georgetown, TX 78627 (include Student ID number on check)
On-line –	Students use "Make a Payment" link on WebAdvisor. Parents go to https://commerce.cashnet.com/swupay & log on using their account information sent to them by their student.

If you are mailing a payment, include the top portion. Keep the lower portion for your records.

IMPORTANT INFORMATION

Fall Balances are due Friday, July 14. Waivers are due July 13. Waiver sites open May 1. <https://www.southwestern.edu/business-office/student-accounts/waivers-for-optional-charges/>

DATE	STATEMENT ACTIVITY	CHARGES	CREDITS
07/01/23	*** Balance Forward ***		-\$2,619.51
07/01/23	Registration - 23/FA	\$25,354.00	
07/01/23	Housing - 23/FA	\$3,080.00	
07/01/23	23/FA Vehicle Registration	\$100.00	
07/01/23	2023-24 Dewar Tuition Refund	\$555.00	
07/01/23	2023-24 Student Health Insuran	\$2,465.00	
07/01/23	23/FA Student Service & It Fee	\$150.00	
07/01/23	12 Meals/week	\$2,698.00	
07/01/23	\$75 Pirate Bucks	\$75.00	

Subtotal: \$31,857.49

CONFIRMED FINANCIAL AID

Mood Scholar Award	\$15,000.00
--------------------	-------------

Confirmed Financial Aid: \$15,000.00







AMOUNT DUE \$16,857.49

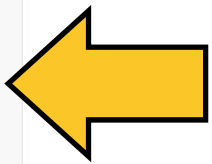
FINANCIAL AID NEEDING ATTENTION

Some of your financial aid is subject to verification and therefore may not appear on this statement. Contact the Financial Aid Office at 512-863-1259 or at finaid@southwestern.edu for more information	
--	--

FINANCIAL AID NEEDING ATTENTION: \$0.00

Transact Payments Portal - Making a Payment

-  Student Name
-  Overview
-  Make a Payment
-  Transactions
-  Statements
-  Sign Out



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

[View all](#)

Date	Description	Receipt	Amount
4/2/20	20_SP: SU Spring 2020 Payment Plan	#59819	\$500.53
3/1/20	20_SP: SU Spring 2020 Payment Plan	#59144	\$1,433.87
2/1/20	(Summer III 2020)	#58408	\$200.00

[Make a payment](#)

Make a Payment

- My Account
- Overview
- Payment Plans
- Make a Payment**
- Transactions
- Statements
- Help
- Sign Out

Step 1 of 3: Pay amount

1-2-3

How much would you like to pay?

Balance items

Check all | 1 of 2 selected

Description	Balance	Amount
<input checked="" type="checkbox"/> (Fall 2023)	\$25,279.00	<input type="text" value="\$25,279.00"/> <input type="button" value="⊗"/> <input type="button" value="v"/> <small>Maximum \$25,279</small>
<input type="checkbox"/> (Spring 2023)	\$400.00	<input type="text" value="\$0.00"/> <input type="button" value="v"/> <small>Maximum \$400</small>

Total balance \$25,679.00
Pay amount \$25,279.00
Remaining balance \$400.00

* Indicates required field











Payment 1 item

\$25,279

Cancel

Checkout

Make a Payment

-  My Account
-  Overview
-  Payment Plans
-  **Make a Payment**
-  Transactions
-  Statements
-  Help
-  Sign Out

[← Pay amount](#)

Step 2 of 3: Payment method



How would you like to pay?

Payment amount


\$25,279

* Payment method

New credit or debit card

New bank account

International payment
Bank Transfer or Credit Card

 Secure encrypted payment

Cancel

Continue



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).



SU Payment Plan

FALL PAYMENT PLANS

Enrollment Deadline	# of Monthly Payments	Payment Due Dates
June 9	5	June 10, July 10, Aug 10, Sept 10, Oct 10
July 9	4	July 10, Aug 10, Sept 10, Oct 10
August 9	3	Aug 10, Sept 10, Oct 10

SPRING PAYMENT PLANS

Enrollment Deadline	# of Monthly Payments	Payment Due Dates
December 9	5	Dec 10, Jan 10, Feb 10, Mar 10, Apr 10
January 9	4	Jan 10, Feb 10, Mar 10, Apr 10
February 9	3	Feb 10, Mar 10, Apr 10



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.



Payment Plans



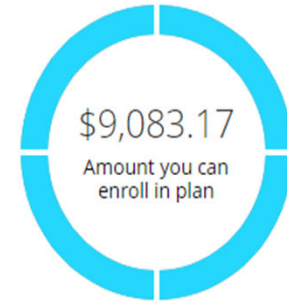
Need to enroll in a payment plan?

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](#)

23_FA

23 Fall Payment Plan



4 payments | \$25 enrollment fee

Payment Schedule

- 1 \$2,270.79
Payment due 7/10/23
- 2 \$2,270.79
Payment due 8/10/23
- 3 \$2,270.79
Payment due 9/10/23
- 4 \$2,270.80
Payment due 10/10/23

Auto pay available: If you set up auto pay, all scheduled payments will occur on the payment plan.

Cancel

Enroll in plan

Payment Plan Enrollment

Step 1 of 4: Agreement



\$9,083.17

You've opted to enroll this amount in 23_FA: 23 Fall Payment Plan

Review the payment schedule and terms and conditions below.

Payment Schedule

1	\$2,270.79	Payment due 7/10/23
2	\$2,270.79	Payment due 8/10/23
3	\$2,270.79	Payment due 9/10/23
4	\$2,270.80	Payment due 10/10/23

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:

9. Communication:

- a. Southwestern University uses email as an official method of communication; therefore, students are responsible for reading their emails from Southwestern University on a timely basis.
- b. It is the student's responsibility to keep Southwestern University records up to date with their current physical address, email addresses, and phone numbers. Refer to the Registrar webpage for instructions on how to update this information.
- c. I have read the Terms and Conditions of this agreement and I 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.

I have read and agree to the SU Payment Plan terms and conditions presented.

Cancel

Continue

Enrollment fee

• • •

How would you like to pay?

Enrollment fee amount
\$25

*** Payment method** [Change](#)

New bank account

Important: Payments can be made from personal checking or savings accounts only. Corporate accounts are not allowed.

***Account holder name**

Account holder name required

*** Account type**

Checking
 Savings

*** Routing transit number**

*** Bank account number** ***Confirm bank account number**

Bank account nickname

My bank account
Maximum 17 characters

Set up auto pay with the same payment method

Auto pay terms and conditions

By enrolling in the Southwestern University Installment Payment Plan (payment plan) Auto Pay, I agree to the following terms and conditions:

Automated Direct Payment:

- a. Payment may be automatically set up to be deducted from your checking or savings account by e-check, debit or credit card.
- b. A non-refundable convenience fee of 2.75% is assessed for all credit card transactions. There is no fee for ACH payments.
- c. Payments will be withdrawn from your account on the 10th day of each month and will be payable to Southwestern University. A record of each payment will be posted to the student's account.
- d. If additional charges or credits are incurred on the student account after initial enrollment in the plan, the payment plan amount will recalculate and the future monthly payment plan amount for the remaining payments will automatically increase

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

Auto Payments

Don't forget

I have read and agree to the automatic payment plan terms and conditions of this agreement. I further 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.

I have read and agree to the terms for automatic payment enrollment for the SU Payment Plan.



Service charge

This site is owned and operated by Transact Campus, Inc. If you choose to make a payment by using Transact Campus SmartPay, you will be charged a service charge for each payment as shown below. This charge is assessed by Transact Campus, Inc. Service charges are included in your transaction and are paid directly to Transact Campus, Inc. Service charges are non-refundable.

Amount due now

22_FA: SU Fall 2022 Payment Plan	
Enrollment fee	\$25.00
Service charge	\$0.69
Total	\$25.69

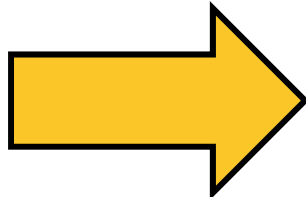
Payment Schedule

- 1 $\$6,056.25 + \$166.55 \text{ service charge} = \$6,222.80$
Payment scheduled 7/10/22 | Payment due 7/10/22
- 2 $\$6,056.25 + \$166.55 \text{ service charge} = \$6,222.80$
Payment scheduled 8/10/22 | Payment due 8/10/22
- 3 $\$6,056.25 + \$166.55 \text{ service charge} = \$6,222.80$
Payment scheduled 9/10/22 | Payment due 9/10/22
- 4 $\$6,056.25 + \$166.55 \text{ service charge} = \$6,222.80$
Payment scheduled 10/10/22 | Payment due 10/10/22

I acknowledge that I have read and accept the terms and conditions of the Transact Campus, Inc. user agreement and I understand that my transaction includes a non-refundable service charge for each payment for the use of Transact Campus SmartPay. [View terms and conditions](#)

Credit/Debit Card transactions have a 2.75% fee.

Sample E-bill with Payment Plan



Southwestern University

ENGAGING MINDS. TRANSFORMING LIVES.

1001 E. University Ave.
Georgetown, TX 78626
512-863-1928
studentaccounts@southwestern.edu

Student Name
1234 Lookout Cove
Georgetown, TX 78626

PAYMENT SUMMARY	
Statement Date:	07/03/23
Student ID:	XXXXXX
Due Date:	07/14/23
TOTAL AMOUNT DUE:	\$15,190.00

PAYMENT OPTIONS:

In Person – At Business Office, located on first floor of Cullen Building

By Mail – P.O. Box 770, Georgetown, TX 78627
(include Student ID number on check)

On-line – Students use "Make a Payment" link on WebAdvisor.
Parents go to <https://commerce.cashnet.com/swupay> & log on using their account information sent to them by their student.

If you are mailing a payment, include the top portion. Keep the lower portion for your records.

IMPORTANT INFORMATION

Fall Balances are due Friday, July 14. Waivers are due July 13. The waivers can be found at: <https://www.southwestern.edu/business-office/student-accounts/waivers-for-optional-charges/>

DATE	STATEMENT ACTIVITY	CHARGES	CREDITS
07/01/23	Registration - 23/FA	\$25,429.00	
07/01/23	\$75 Pirate Bucks	\$75.00	
07/01/23	23/FA Vehicle Registration	\$100.00	
07/01/23	2023-24 Dewar Tuition Refund	\$555.00	
07/01/23	2023-24 Student Health Insuran	\$2,465.00	
07/01/23	23/FA Student Service & It Fee	\$150.00	
07/03/23	2023-24 Dewar Tui Ins Waiver		-\$555.00
07/03/23	2023-24 Health Insurance Waive		-\$2,465.00
07/03/23	12 Meals/Week	\$2,698.00	

Subtotal: **\$28,452.00**

CONFIRMED FINANCIAL AID	
Ruter Scholar Award	\$11,513.00
Tuition Equalization Grant	\$1,749.00

Confirmed Financial Aid: **\$13,262.00**

AMOUNT DUE **\$15,190.00**

PAYMENT PLAN INFORMATION			
Term	Payment Plan	Due Date	Installment Amount
23_FA	23 Fall Payment Plan	7/10/2023 12:00:00 AM	\$3,797.50
23_FA	23 Fall Payment Plan	8/10/2023 12:00:00 AM	\$3,797.50
23_FA	23 Fall Payment Plan	9/10/2023 12:00:00 AM	\$3,797.50
23_FA	23 Fall Payment Plan	10/10/2023 12:00:00 AM	\$3,797.50

Payment Plan Amount Due	\$15,190.00
--------------------------------	--------------------

**July 13, 2023 –
last day to waive ALL
3 optional charges!**

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

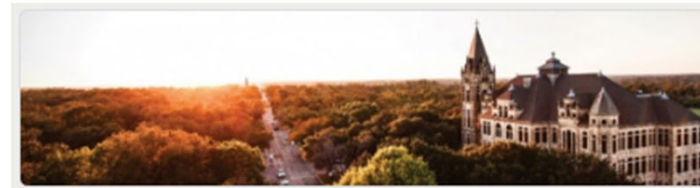
Withdrawal Refund Policy

1098-T Form

WAIVER TYPE	AMOUNT OF CHARGE 2023-2024	WAIVER SITE OPENS	WAIVER SITE CLOSES	FREQUENCY
Vehicle Registration NOTE - Can only be done by students since it requires log in through student email	\$100 each semester	Fall 2023: 5/1 Spring 2024: 11/1	Fall 2023: 7/13 Spring 2024: 1/12	Each Semester
Dewar Tuition Refund Plan IMPORTANT - Policy coverage is 75% for both injury and illness withdrawals & mental health withdrawals	\$555 New SU Students for Spring 2024 \$277	5/1 11/1	7/13 1/12/24	Annually Spring 2024
Student Health Insurance NOTE : A verification code will be sent to the student's SU email as part of the validation process.	\$2,465 for academic year New SU Students for Spring 2024 TBD	5/1 11/1	7/13 1/12/24	Annually Spring 2024

The vehicle waiver form must be completed by the student. It requires log in through the SU student email.

The fine for parking on campus without a parking decal is \$125 per violation.



Southwestern University Police Department Parking Permit Waiver

The Southwestern University student handbook specifically states under section XII - Traffic and Parking Regulations that all owners and/or operators of motor vehicles must observe the requirement of registering said motor vehicles on forms provided during the regular registration period. The annual \$200 parking fee is billed separately as \$100 in the Fall semester and \$100 in the Spring semester.

All students are automatically charged a vehicle registration fee of \$100 each semester. If a student does not park a vehicle on campus, the charge may be waived by completing this online waiver form. This waiver must be completed prior to the deadline for each semester individually and only applies to the indicated semester. If a vehicle is brought to campus after this waiver process is completed, the required fee of \$100 must be paid for that semester, and the owner/operator must register the vehicle at the University Police Office within two days after arrival on campus.

By completing this online form you are certifying that you will not be parking a motor vehicle on Southwestern University property for this semester. Those individuals who have been found, through police intervention, to be parking motor vehicles on University property in violation of the above stated policy will be subject to administrative disciplinary action to include a fine and/or loss of all driving and parking privileges on University property. Any violation of the above stated policy will be subject to administrative disciplinary action to include a fine and/or loss of all driving and parking privileges on University property for the remainder of the given semester. The fine for not having a parking decal is \$125.

Southwestern University Student Handbook
"A student who enrolls at Southwestern University voluntarily becomes part of a community where respect for others is the norm. Rational, mature, honest behavior is expected. This voluntary entrance into the community implies acceptance by the student of University regulations. Any form of dishonesty is a violation of personal integrity and is unworthy of an academic community. One example of such dishonesty is as follows: "Supplying false information to the University."

thomps2@southwestern.edu [Switch account](#)

Draft restored

Your email will be recorded when you submit this form

* Required

Will you ever potentially park a car on campus? *

- Yes
- No
- Maybe

Next

Clear form

Southwestern University Police Department Parking Permit Waiver

thomps2@southwestern.edu [Switch account](#)

Your email will be recorded when you submit this form

* Required

Vehicle Registration Waiver

Your First Name *

full name not an initial

Your answer

Your middle Name *

Your answer

Your last name *

Your answer

Your ID Number *

Your answer

Semester *

Fall 2022

Certification of Vehicle Registration Waiver

On this date *

Date

mm/dd/yyyy

I do hereby affirm that I will not be operating a motor vehicle on University property for the semester indicated above. I further affirm that if I decide to operate a motor vehicle on University property, I will contact the University Police Department within two days to purchase and receive my vehicle parking permit. I further understand that by completing this waiver, I am requesting the Business Office to process my \$100 waiver to my student account.

I acknowledge

A copy of your responses will be emailed to thomps2@southwestern.edu.

Back

Submit

Clear form

Never submit passwords through Google Forms.



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 2023-24. 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 13, 2023**.

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:

If the Medical Withdrawal Occurs:	University Refunds:	Dewar Refunds:	Student Receives:
During first full week of classes	80%	0%	80%
During second full week of classes	60%	15%	75%
During third full week of classes	50%	25%	75%
During fourth full week of classes	40%	35%	75%
During fifth full week of classes	30%	45%	75%
After the fifth full week of classes	0%	75%	75%

The deadline for waiving is:
July 13, 2023

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

Student Information

First

Middle

Last

Student ID

Re-enter Student ID

E-mail address

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.

Submit



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 2023-24 is \$2,465.
- Southwestern does not keep any of the insurance premium.
- 12 month coverage period of 8/10/2023 to 8/9/2024.
- Insurance policy is portable.

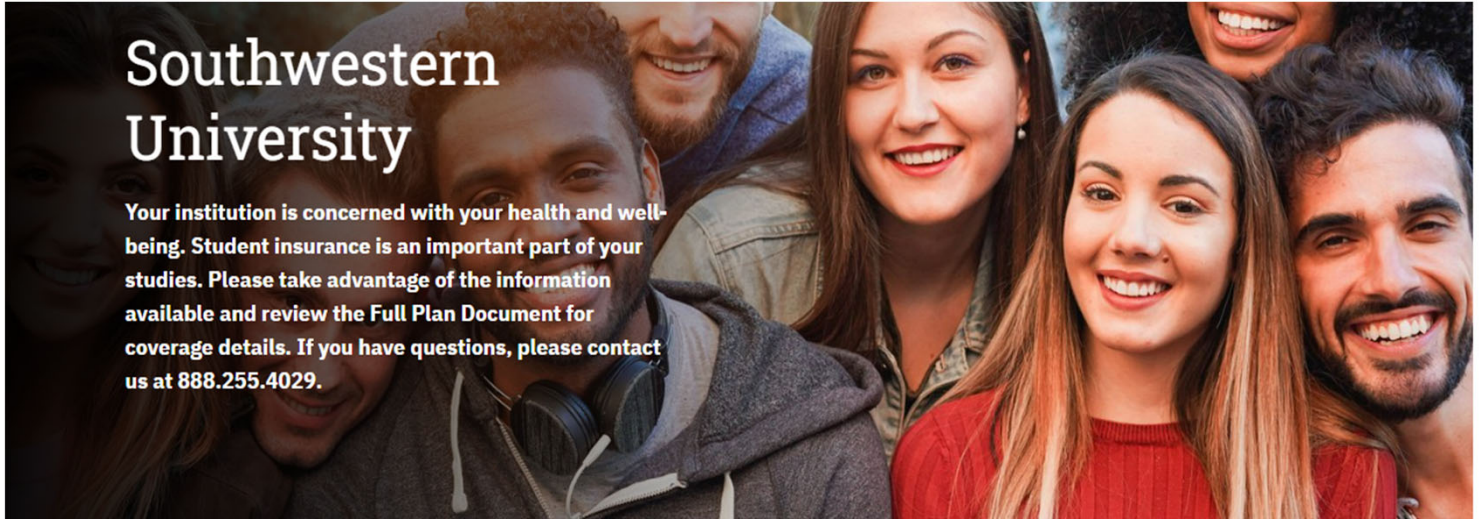


EIIA Early Enrollment & On-line Waiver Process

- 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 13, 2023**.
- 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



Guaranteed Tuition Plan (TX Tomorrow) or other State Prepaid Plan (Florida, Mississippi, etc.)

- Notify Student Accounts at studentaccounts@southwestern.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.

Sample Texas Tomorrow E-bill

If you are mailing a payment, include the top portion. Keep the lower portion for your records.

IMPORTANT INFORMATION
Fall Balances are due Friday, July 14. Waivers are due July 13. Waiver sites open May 1. <https://www.southwestern.edu/business-office/student-accounts/wai-vers-for-optional-charges/>

DATE	STATEMENT ACTIVITY	CHARGES	CREDITS
07/01/23	*** Balance Forward ***		-\$1,334.49
07/01/23	Registration - 23/FA	\$25,279.00	
07/01/23	23/FA Vehicle Registration	\$100.00	
07/01/23	2023-24 Dewar Tuition Refund	\$555.00	
07/01/23	2023-24 Student Health Insuran	\$2,465.00	
07/01/23	23/FA Student Service & It Fee	\$150.00	
07/02/23	Anticipated 23/FA Tx Tomorrow		-\$4,372.20

Subtotal: \$22,842.31

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

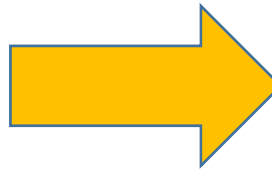
Student Account Refunds


Late Payment Policy

Payment Terms Agreement

Withdrawal Refund Policy

1098-T Form



 SOUTHWESTERN UNIVERSITY

STUDENT ACCOUNTS

Student Account Refunds

Contact | Student Accounts | Email: studentaccounts@southwestern.edu | Phone: 512.863.1928

STUDENT ACCOUNT REFUND REQUEST FORM

PIRATE BUCKS TRANSFER FORM

Pirate Bucks can also be used for SU Bookstore online purchases

BOOKSTORE VOUCHER/TRANSFER FORM

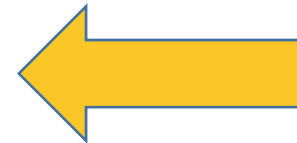
Transfer funds to a SU Bookstore voucher for use in the store (not for online purchases). Any unused balance will be transferred back to your Student Account.

DIRECT DEPOSIT ENROLLMENT INSTRUCTIONS

General Student Refund Information:

Refunds can not be requested until the first class day of the semester.

Refunds cannot be processed until all charges have been paid and all financial aid has been disbursed.



All forms must be completed by the student.

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.
- July 13, 2023 - Waivers are due .
- July 14, 2023 – 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.



SPROG DAY

Questions

■ **Financial Aid Office**

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

■ **Business Office – Student Accounts**

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

■ **Self Service/Proxy Access Issues**

- Email: helpdesk@southwestern.edu