



Billing, Waivers, Financial Aid and More

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Dean of Financial Aid

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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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Financial Aid – Next Steps

■ Disbursement Dates

- Fall: August 15, 2025
- Spring: January 12, 2026

■ Merit Scholarships

- No additional steps needed

■ Verification

- List of required documents available on Self Service
- Priority deadline: June 25, 2025
- Must be completed before funds can be disbursed



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Financial Aid – Next Steps

Tuition Equalization Grant

- Texas Residency Form - due June 25, 2025
- 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



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Financial Aid – Next Steps

■ Thank you notes

- Thank You note request email sent from *scholarships@southwestern.edu*
- For named scholarships/grants from SU
- Due date June 25, 2025



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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 25, 2025



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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 25, 2025



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Financial Aid – Next Steps

Private Loans

- Contact Lender for application information
- Private loan lender list available on Financial Aid Website
- Complete by June 25, 2025

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 25, 2025



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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



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Renewing Financial Aid

■ **File FAFSA each year**

- Required for renewing most financial aid, including loans
- FAFSA available in October 2025
- 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.



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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



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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



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Financial Aid Appointments

- Counselors available to meet with families
- Appointments available 1:00 pm – 4:00 pm today
- Link to make appointment sent to SU email account



Billing Information



Becoming a Student

– **Current Students**

Parents & Family

Faculty & Staff

Alumni

ACADEMIC ADVISING

ACADEMICS

BILLING & PAYMENTS

DIRECTORY

DIVERSITY

DEVELOP YOUR CAREER

LIBRARY & IT

MYSOUTHWESTERN

PIRATE CARD

REGISTRAR & RECORDS

RESOURCES & TOOLS

SAFETY & SECURITY

SCHOLARSHIPS/FINANCIAL AID

STUDENT LIFE

STUDY ABROAD

ABOUT SOUTHWESTERN

ATHLETICS

CALENDAR

DIRECTORY

FINE ARTS

GIVING

LIBRARY & IT

NEWS



A Future Full of Promise

Southwestern University announces its 2021–2026 Tactical Plan.



Southwestern University Students Samuel Hoffman '27 and Ethan Wilcox '26 Earn 2025 Sumners Scholarships

Samuel Hoffman '27 and Ethan Wilcox '26 were each awarded \$40,000 scholarships from The Sumners Foundation for their studies at Southwestern University.



Southwestern University, Texas A&M University Partner to Create Educational Pathways to Graduate Business Programs



Southwestern University Enters Partnership with Baylor University for Accelerated Nursing Degree Program



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 Financial Aid & Billing Presentation - June 2024

2025-2026 Key Financial Dates and Deadlines

Billing Schedule & Due Dates

SEMESTER	E-BILL AVAILABILITY DATES	PAYMENT DUE DATE
Summer 2025	E-Bills released April 22, 2025	May 09, 2025
	Returning Students E-bills - May 01, 2025	
Fall 2025	Returning Students Reminder E-bills June 27, 2025	July 11, 2025
	New Students - E-Bill received after registration	
Spring 2026	E-bills released Nov. 21, 2025	Dec. 12, 2025



Fall 2025 Dates

At Sprog	Register for classes.
6/27/25	Fall 2025 E-bills Released in Transact Payments Portal.
7/10/25	All waivers due.
7/11/25	Fall 2025 Tuition Due or Enroll in Payment Plan.
7/21/25	\$150 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 2026 Dates

11/21/25	Spring 2026 E-Bills Released in Transact Payments Portal.
12/11/25	Spring 2026 Vehicle Waiver Due.
12/12/25	Spring 2026 Tuition Due or Enroll in Payment Plan.
12/19/25	\$150 Late Fee Assessed on Unpaid Balances.
1/15/26	Students with unpaid Spring Balances must move out of housing & Spring classes will be cancelled.



Payment Options

Online via Transact Payments Portal

- Credit Cards – 2.95% 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

☰

Home

Financial Information ^

Student Finance ^

View E-Bill and Make a Payment

Payer Transact Payment Portal

Financial Aid v

Tax Information

Banking Information

UNIVERSITY

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

Notifications

Title	Details
Required	There are 4 requests from your institution that require your action.

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 payable payments (reimbursements, refunds, etc). For j 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


 SOUTHWESTERN
UNIVERSITY


Overview


 1


 My Account


 Overview


 Payment Plans

 Make a Payment

 Transactions

 Statements

 Help

 Sign Out

SN

Student Name

\$28,109

Summary

[View statements](#)

(Fall 2025)


\$28,109.00

Balance

\$28,109.00

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](#)

Recent transactions

[View all](#)

[Make a payment](#)



My Account



Overview



Payment Plans



Make a Payment



Transactions



Statements



Help



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](#)

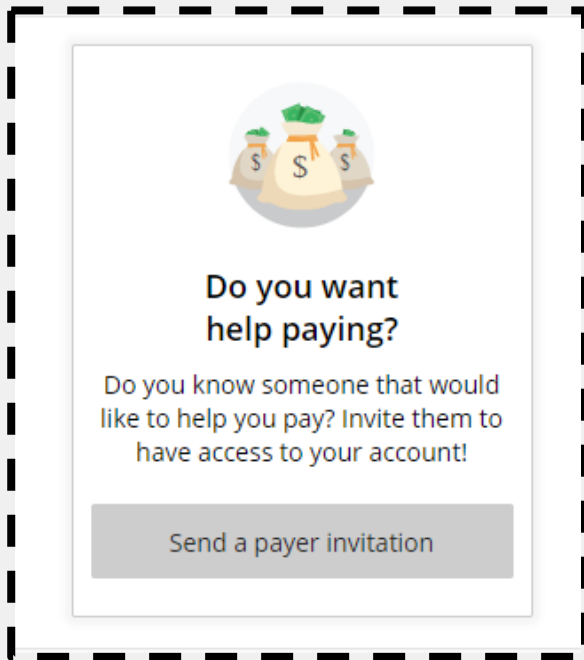
[View](#)

Recent transactions

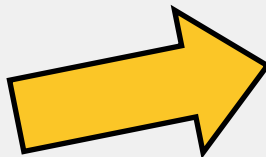
[View all](#)


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](#)



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.



User name ⓘ

Parent 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>

Viewing E-Bills/Statements

SOUTHWESTERN
UNIVERSITY

My Account

Overview

Payment Plans

Make a Payment

Transactions

Statements

Help

Sign Out

Overview

Student Name

Balance

\$28,109

Summary


(Fall 2025)

\$28,109.00

Balance

\$28,109.00

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

Recent transactions

Make a payment

View statements

View

View all



Statements

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

Date	Description		View	Save
5/1/25	SWU Bill			
1/3/25	SWU Bill			
11/15/24	SWU Bill			
9/26/24	SWU Bill			
9/16/24	SWU Bill			

Sample Fall 2025 E-bill/ Statement

**Full-time Tuition
(12-19 credits)
is \$28,109
Lab Fees = \$75
Music Lessons =
\$225-\$450**

**NOTE – Student must
accept offered
financial aid in self-
service before it will
appear on the e-bill.**



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

Student Name
1234 Pirate Cove
Georgetown, TX 78626

PAYMENT SUMMARY

Statement Date:	07/03/25
Student ID:	2
Due Date:	07/11/25

TOTAL AMOUNT DUE: \$20,644.49

PAYMENT OPTIONS:

In Person – At Business Office, located on first floor of Cullen Building
By Mail – 1001 E. University Ave., Georgetown, TX 78626
(include Student ID number on check)
On-line – Students use "Make a Payment" link on Self Service.
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 July 11. Waivers for vehicle & Dewar are open now. Health insurance opens May 6. If planning to opt out of Black & Gold, please subtract the \$400 and pay the lesser amount. Opt out will open August 11. Payment plans will automatically adjust.

DATE	STATEMENT ACTIVITY	CHARGES	CREDITS
07/01/25	*** Balance Forward ***		-\$4,563.51
07/01/25	Registration - 25/FA	\$28,334.00	
07/01/25	Housing - 25/FA	\$4,403.00	
07/01/25	Unlimited Meals/Week	\$3,506.00	
07/01/25	\$75 Pirate Bucks	\$75.00	
07/01/25	25/FA Student Service & It Fee	\$263.00	
07/01/25	25/FA Vehicle Registration	\$120.00	
07/01/25	2025 Student Health Insurance	\$2,511.00	
07/01/25	2025 Dewar Tuition Refund Plan	\$596.00	
07/01/25	25/FA Black & Gold Advantage	\$400.00	

Subtotal: \$35,644.49

CONFIRMED FINANCIAL AID

Southwestern Award	\$15,000.00
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Confirmed Financial Aid: \$15,000.00

Financial Aid Needing Attention Example

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

Southwestern University

ENGAGING MINDS. TRANSFORMING LIVES.

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

Student Name
1234 Pirate Cove
Georgetown, TX 78626

PAYMENT SUMMARY

Statement Date:	07/03/25
Student ID:	
Due Date:	07/11/25
TOTAL AMOUNT DUE:	\$18,318.00

PAYMENT OPTIONS:

In Person –	At Business Office, located on first floor of Cullen Building
By Mail –	1001 E. University Ave., Georgetown, TX 78626 (include Student ID number on check)
On-line –	Students use “Make a Payment” link on Self Service. 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 July 11. Waivers for vehicle & Dewar are open now. Health insurance opens May 6. If planning to opt out of Black & Gold, please subtract the \$400 and pay the lesser amount. Opt out will open August 11. Payment plans will automatically adjust.

DATE	STATEMENT ACTIVITY	CHARGES	CREDITS
07/01/25	Registration - 25/FA	\$28,100.00	
07/01/25	25/FA Student Service & It Fee	\$283.00	
07/01/25	25/FA Vehicle Registration	\$120.00	
07/01/25	2025 Student Health Insurance	\$2,511.00	
07/01/25	2025 Dewar Tuition Refund Plan	\$586.00	
07/01/25	25/FA Black & Gold Advantage	\$400.00	

Subtotal: \$31,999.00

CONFIRMED FINANCIAL AID

Cody Scholar Award	\$13,181.00
Legacy Scholarship	\$500.00

Confirmed Financial Aid: \$13,681.00

AMOUNT DUE: \$18,318.00

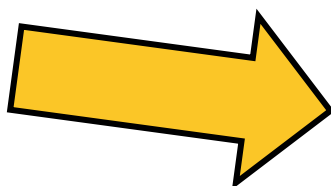
FINANCIAL AID NEEDING ATTENTION

Cody-Debbie Wiemers Hemphil End	\$1,710.00
Cody-Class of 1967 Endowed Scho	\$110.00

FINANCIAL AID NEEDING ATTENTION: \$1,820.00

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:	07/03/25
Student ID:	
Due Date:	07/11/25
TOTAL AMOUNT DUE:	\$17,599.00

PAYMENT OPTIONS:

In Person – At Business Office, located on first floor of Cullen Building
By Mail – 1001 E. University Ave., Georgetown, TX 78626
(include Student ID number on check)
On-line – Students use "Make a Payment" link on Self Service.
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 July 11. Waivers for vehicle & Dewar are open now. Health insurance opens May 6. If planning to opt out of Black & Gold, please subtract the \$400 and pay the lesser amount. Opt out will open August 11. Payment plans will automatically adjust.

DATE	STATEMENT ACTIVITY	CHARGES	CREDITS
07/01/25	Registration - 25/FA	\$28,209.00	
07/01/25	25/FA Student Service & It Fee	\$263.00	
07/01/25	25/FA Vehicle Registration	\$120.00	
07/01/25	2025 Student Health Insurance	\$2,511.00	
07/01/25	2025 Dewar Tuition Refund Plan	\$586.00	
07/01/25	25/FA Black & Gold Advantage	\$400.00	

Subtotal: \$32,099.00

CONFIRMED FINANCIAL AID

McKenzie Scholar Award	\$14,500.00
------------------------	-------------

Confirmed Financial Aid: \$14,500.00

AMOUNT DUE \$17,599.00

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



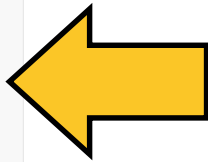
Transact Payments Portal - Making a Payment



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

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](#)

How much would you like to pay?

Balance items

☒ Uncheck all | 1 of 1 selected

Description

Balance

Amount

☒ (Fall 2025)

\$17,003.00

\$17,003.00

Maximum \$17,003

Total balance

\$17,003.00

Pay amount

\$17,003.00

Remaining balance

\$0.00

* Indicates required field



Payment 1 item


\$17,003


Cancel


Checkout





Make a Payment


 My Account

 Overview


 Payment Plans

 **Make a Payment**

 Transactions

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 Sign Out

Step 2 of 3: Payment method



< Pay amount

i 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](#)



How would you like to pay?

Payment amount

\$28,109


*** 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).



FALL PAYMENT PLANS

Enrollment Deadline	# of Monthly Payments	Payment Due Dates
June 14	5	June 15, July 15, Aug 15, Sept 15, Oct 15
July 14	4	July 15, Aug 15, Sept 15, Oct 15
August 14	3	Aug 15, Sept 15, Oct 15

SPRING PAYMENT PLANS

Enrollment Deadline	# of Monthly Payments	Payment Due Dates
December 14	5	Dec 15, Jan 15, Feb 15, Mar 15, Apr 15
January 14	4	Jan 15, Feb 15, Mar 15, Apr 15
February 14	3	Feb 15, Mar 15, Apr 15



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



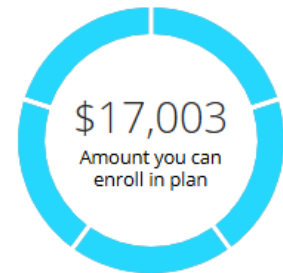
Need to enroll in a payment plan?

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](#)

25_FA

25 Fall Payment Plan



5 payments | \$25 enrollment fee

Payment Schedule

- 1 **\$3,400.60**
Payment due 6/15/25
- 2 **\$3,400.60**
Payment due 7/15/25
- 3 **\$3,400.60**
Payment due 8/15/25
- 4 **\$3,400.60**
Payment due 9/15/25
- 5 **\$3,400.60**
Payment due 10/15/25

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

1 2 3 4

\$17,003

You've opted to enroll this amount in 25_FA: 25 Fall Payment Plan

Review the payment schedule and terms and conditions below.

Payment Schedule

1	\$3,400.60	Payment due 6/15/25
2	\$3,400.60	Payment due 7/15/25
3	\$3,400.60	Payment due 8/15/25
4	\$3,400.60	Payment due 9/15/25
5	\$3,400.60	Payment due 10/15/25

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:

As a student enrolled in classes at Southwestern University, I agree to assume full financial responsibility for all charges incurred on my student account whether I attend the classes or not. I further understand that my failure to be fiscally responsible may result in service holds, late fees, collection

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

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

① Account holder name required

* Account type

- ☐ Checking
☐ Savings

* Routing transit number ①

* Bank account number ①

* Confirm bank account number

Bank account nickname ①

Maximum 17 characters

Bank account terms and conditions

By checking the box below, you authorize Southwestern University to withdraw payment for the amount indicated from your account. You represent you have the authority to withdraw funds from the deposit account selected. Because this is an electronic transaction (also called an ACH transaction), the payment funds may be withdrawn from your account on the payment date. You also understand and further authorize that if your ACH payment is returned due to inaccurate account information or insufficient

☐ I agree

☒ 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. Effective July 5th the transaction fee is increasing to 2.85%. There will be a minimum fee of \$3 for transactions over \$20 and less than \$106. There is no fee for ACH payments at this time, but this could change.
c. Payments will be withdrawn from your account on the 10th day of each month and

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

Don't forget

Auto Payments

Cancel

Continue

Credit/Debit Card transactions have a 2.95% fee.

Service fee

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 fee for each payment as shown below. This charge is assessed by Transact Campus, Inc. Service fees are included in your transaction and are paid directly to Transact Campus, Inc. Service fees are non-refundable.

Amount due now

24_FA: 24 Fall Payment Plan	
Enrollment fee	\$25.00
Service fee	\$3.00

Total **\$28.00**

Payment Schedule

- 1 $\$3,507.20 + \$99.96 \text{ service fee} = \$3,607.16$
Payment scheduled 6/15/24 | Payment due 6/15/24
- 2 $\$3,507.20 + \$99.96 \text{ service fee} = \$3,607.16$
Payment scheduled 7/15/24 | Payment due 7/15/24
- 3 $\$3,507.20 + \$99.96 \text{ service fee} = \$3,607.16$
Payment scheduled 8/15/24 | Payment due 8/15/24
- 4 $\$3,507.20 + \$99.96 \text{ service fee} = \$3,607.16$
Payment scheduled 9/15/24 | Payment due 9/15/24
- 5 $\$3,507.20 + \$99.96 \text{ service fee} = \$3,607.16$
Payment scheduled 10/15/24 | Payment due 10/15/24

☐ 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 fee for each payment for the use of Transact Campus SmartPay. [View terms and conditions](#)

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:	07/03/24
Student ID:	XXX
Due Date:	07/12/24
TOTAL AMOUNT DUE:	\$13,788.80

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 July 12. Waivers are due July 11. Visit https://www.southwestern.edu/business-office/student-accounts/waivers-for-optional-charges/ for more information. Visit https://www.southwestern.edu/black-and-gold-advantage/ for more information about Black & Gold Advantage.	

DATE	STATEMENT ACTIVITY	CHARGES	CREDITS
07/01/24	*** Balance Forward ***		-\$3,447.20
07/01/24	24/FA Tuition	\$26,644.00	
07/01/24	24/FA Housing	\$4,138.00	
07/01/24	24/FA Unlimited Meals/Week	\$3,323.00	
07/01/24	\$75 Pirate Bucks	\$75.00	
07/01/24	24/FA Student Service & It Fee	\$163.00	
07/01/24	24/FA Vehicle Registration	\$120.00	
07/01/24	2024-25 Dewar Tui Ins Plan	\$555.00	
07/01/24	2024-25 Student Health Insuran	\$2,468.00	
07/01/24	24/FA Orientation Fee	\$200.00	
07/01/24	Deposit Allocation		-\$250.00
07/01/24	Deposit Allocation		-\$200.00

Subtotal: **\$33,788.80**

CONFIRMED FINANCIAL AID	
Cody Scholar Award	\$17,500.00
Southwestern Grant	\$2,500.00

Confirmed Financial Aid: **\$20,000.00**

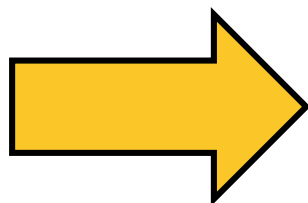
AMOUNT DUE **\$13,788.80**

PAYMENT PLAN INFORMATION			
Term	Payment Plan	Due Date	Installment Amount
24_FA	24 Fall Special Payment Plan A	6/15/2024 12:00:00 AM	\$0.00
24_FA	24 Fall Special Payment Plan A	7/15/2024 12:00:00 AM	\$3,447.20
24_FA	24 Fall Special Payment Plan A	8/15/2024 12:00:00 AM	\$3,447.20
24_FA	24 Fall Special Payment Plan A	9/15/2024 12:00:00 AM	\$3,447.20
24_FA	24 Fall Special Payment Plan A	10/15/2024 12:00:00 AM	\$3,447.20

Payment Plan Amount Due

\$13,788.80

Sample
E-bill
with
Payment
Plan





**July 10, 2025 –
last day to waive ALL
3 optional charges!**

3 Optional Charges/Waivers

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1098-T Form

WAIVER TYPE	AMOUNT OF CHARGE 2025-26	WAIVER SITE OPENS	WAIVER SITE CLOSES
Vehicle Registration ¹² NOTE - Can only be done by students since it requires log in through student email	\$120 each semester	Fall 5/1/2025 Spring 11/1/2025	Fall 7/10/2025 Spring 1/09/2026
Dewar Tuition Refund Plan ¹² IMPORTANT - Policy coverage is 75% for both injury and illness withdrawals & mental health withdrawals	\$596 2025-26 academic year \$298 New SU Students for Spring 2026	5/1/2025 11/1/2025	7/10/2025 1/09/2026
Student Health Insurance ¹²	\$2511 2025-26 academic year TBD New SU Students for Spring 2026	5/6/2025 11/1/2025	7/10/2025 1/09/2026

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 \$240 parking fee is billed separately as \$120 in the Fall semester and \$120 in the Spring semester.

All students are automatically charged a vehicle registration fee of \$120 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 \$120 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."

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

Will you ever potentially park a car on campus? *

- ☐ Yes
- ☐ No
- ☐ Maybe

Southwestern University Police Department Parking Permit Waiver

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

Your email will be recorded when you submit this form

* Indicates required question

Vehicle Waiver

Semester *

☐ Fall 2024

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 \$120 waiver to my student account. *

☐ I acknowledge

[Back](#)

[Next](#)

[Clear form](#)



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).
- \$596 Dewar Tuition Refund Plan Annual Charge for 2025-26. 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 10, 2025**.



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%

Coverage Details

About Dewar

Waiver Form

The deadline for waiving is:
July 10, 2025

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 are waiving your entitlement to any

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.



I'm not a robot





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 2025-26 is \$2,511.
- Southwestern does not keep any of the insurance premium.
- 12 month coverage period of 8/10/2025 to 8/9/2026.
- 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 10, 2025**.
- Your personal insurance plan **must** provide coverage locally in the SU area.



SOUTHWESTERN UNIVERSITY

**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



SOUTHWESTERN UNIVERSITY

BLACK & GOLD ADVANTAGE

The Black & Gold Advantage program makes getting your course materials more convenient and affordable.

- Receive all your course materials before the first day of class
- Save 35-50% on the cost of course materials each term
- Benefit from a highly personalized service

How it Works



REGISTER FOR CLASSES

Upon registering for courses, you will be automatically enrolled into the program.



VERIFY YOUR ORDER

Starting 30 days before the first day of classes, you will receive an email to verify your order and select your fulfillment preference.



RECEIVE YOUR TEXTBOOKS

An email notification will be sent when your order is ready for pickup or when it ships. Your digital materials will be delivered for your course(s) within Moodle.



Southwestern Black & Gold Advantage

- \$25 per credit. Full time minimum charge of \$400
- Opt out period starts August 11
- After 12th class day account will be adjusted for actual enrolled credits.



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.



Using a 529 Plan

- Contact your 529 plan to initiate the withdrawal.
- Provide mailing address for Southwestern & your student ID number
- They will then mail a payment to Southwestern. Please keep in mind that this can take several business days to process before the payment is mailed
- Once requested, please notify Student Accounts at studentaccounts@southwestern.edu so we can be on lookout for payment



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1098-T Form



STUDENT ACCOUNTS

Student Account Refunds

Contact

Student Accounts

Email
studentaccounts@southwestern.edu

Phone
512.853.1928

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.
As a condition of receiving a refund, the student must be in good academic standing.

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. There are 2 invitations necessary. Proxy & Transact portal
- July 10, 2025 - Waivers are due .
- July 11, 2025 – 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.



Contact Information

■ Financial Aid

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

■ Student Accounts

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