WELCOME…

to the Bursar's Office Presentation

Everything you wanted to know about student billing, payment deadlines, online payment services and more…

Presented by: Bursar Office

Overview

❖ **Bursar Office:** Functions and Website

❖ **FERPA & Authorized Payers:** Show how easily students can grant permissions to both

❖ **Online Billing & Payment Center:**
  Where to view bills, look at real-time account activity, enroll in a term payment plan, and make a payment

❖ **SCU Sponsored Health Insurance:** *$TBD - how to waive & deadline (September 27, 2024)

❖ **SCU Sponsored Tuition Insurance Plan:** "The Plan": $57 per quarter; $171 academic year - how to waive & deadline (September 22, 2024)

❖ **Refund Policies:** Important deadline for both parties

❖ **OneStop Office**

*(Rate currently pending approval from California Department of Insurance)

Bursar Office is – what we do

❖ Responsible for the management and integrity of SCU's student accounting records and receivable portfolio for all programs

❖ Process all student account related billing (tuition, required fees, health insurance, tuition insurance, room & board, financial aid, miscellaneous charges

❖ Administration of the SCU Authorized User Payment Portal and term payment plans

❖ Process student refunds, overpayments to government agencies, college saving accounts, trust funds, etc.

BURSAR OFFICE

SCU TUITION AND FEES | BILLING | PAYMENT OPTIONS | REFUND POLICIES & PROCESSES | TUITION PROTECTION

Home › Bursar's Office

We are responsible for

- Communicating the annual **tuition and fees** schedule
- Student billing and the collection of tuition, housing, an fees
- Organizing **payment plans**
- Processing student payments, **wire transfers**
- Managing **Student Holds**

2023-2024 New Student - Parent Orientation
Here are a few quick links and how-to's

Students	Parents/Authorized Payer
How to set up Payment Elections (Direct Deposit)	Authorized Payer Login
How to create an Authorized Payer	Waiving Health Insurance
How to complete FERPA Release	How to set up a term payment plan
Dewar's-How to Opt out	1098-T Instructions for Tax Year 2022
Make a Payment	
View My Student Account	
How to Update 1098-T Electronic Consent	

Bursar's Office

SCU Tuition and Fees

Billing

Payment Options

Payment Policies

Refund Policies & Processes

Financial Responsibility

Student Holds

Tuition Protection

1098-T

Contact Us

Waive Health Insurance »

The official site of the SCU Tuition and Fee Schedule

Helpful HOW-TO's

As well as other helpful financial information & today's presentation materials will be on our Bursar website

www.scu.edu/bursar

Financial Responsibility

❖ Students are ultimately responsible for adhering to SCU policies and deadlines, not their parents

❖ Students are required during their Onboarding to sign a Financial Agreement outlining Santa Clara's terms and conditions each year

❖ Students have access to review their signed Agreement in Workday

❖ Copy of annual agreement is available on Bursar website:

www.scu.edu/bursar/financialresponsibility

FERPA - Family Education Rights and Privacy Act…It's the law

❖ In a nutshell...

   ❖ The University can *<u>not</u>* provide information on a student's account or academic progress to any third party, even parents paying the bill.

   ❖ If a student would like the University to be able to discuss financial matters and student records with a third party (like parents), then the student needs to complete the FERPA release form. This release may be submitted at any time during the year.

      NOTE – FERPA and Authorized Payer are two separate permissions

Complete FERPA Release Form

Process

Logging into Workday, Navigate to your Student Profile by clicking the **View Profile** icon shown below.

Choose "**Personal**"

Then click the **"Additional Data"** tab and then "**Edit**" to the information that you would like to disclose on the FERPA release.

| Names | Personal Information | IDs | Documents | Additional Data |

FERPA Information Release

0 items

Person's Name	Person's Relationship to You	Person's Address	Person's Phone Number	Person's Date of Birth	Person's Security Word for Verification	FERPA Release - Academic Records	FERPA Release - Financials
			No items available.				

Edit

Once you have agreed, complete the form and select the information to be released to the parent or third party. Student can choose what information they want to release. Click **OK**

Click the **Done** button. To add another person, simply click the **Edit** button when done.

Make sure your parent/third parties known the security word as they will be asked before providing any information on your account.

* Person's Name ···

* Person's Relationship to You ···

* Person's Address ···

* Person's Phone Number ···

* Person's Date of Birth ···

* Person's Security Word for Verification ···

FERPA Release - Academic Records ···

FERPA Release - Financials ···

Student Setting up an Authorized Payer

Authorized Payers are parents, spouses, or others who are given access by the student to view bills and make payments online. Students must provide permission for any third party to view financial information and submit a payment on their behalf.

Log into your Workday portal, click the Finances icon.

Under **My Account**, click **Make a Payment**, **Connect to Make On Line Payment**. Note: This will open an external site, **Transact**, to setup an **Authorized Payer**.

Select **My Account** from the left-hand navigation. Click on **Send a Payer Invitation**

Enter all required information for your **Authorized Payer**, It is case sensitive. Click **Send Invitation**

My Account
Payer Invitation

Payer information

* First name

* Last name

* Email address

* Confirm email address

By sending this invitation, you hereby authorize this payer to access your account information and/or make payments.

Authorized Payers will receive their login information via email, and should immediately change their password within 24 hours.

Authorized Payer link to make a payments: **https://commerce.cashnet.com/scupay**

User name

SantaClaraUniversity

Password

••••••••••

Sign in

Forgot password

Billing – what to expect

❖Billing is processed <u>electronically</u> at the beginning of each month and will include:

  ❖ ***<u>Charges</u>****: quarterly tuition & room/board, required fees, Access card charges and miscellaneous fees*

  ❖ ***<u>Credits:</u>*** *enrollment/housing deposits, all payments, quarterly anticipated & disbursed financial aid, reported external scholarships*

❖An e-bill notification will be sent to the student's SCU gmail account and any ***Authorized Payer*** they have set-up.

❖The student must provide permission for any third party to view financial information and submit payment on their behalf.

Overview

Santa Clara University TRAINING

The Notification box will have University messages and Hold messages. The Notification box will minimize to a bell icon

Balance

$15,909.67

- My Account
- Overview
- Activity Details
- Auto Pay
- Payment Plans
- Make a Payment
- Transactions
- Statements
- Help
- Sign Out

Summary

View statements

Spring 2024 Quarter: UG 3-month Spring Payment Plan $15,909.67
Auto payment scheduled 4/15/24 $7,954.84

Balance   **$15,909.67**

Account Balance:	$15,909.67
Due Now:	$15,909.67
Past Due:	$15,909.67
Current Due:	$0.00
Future Due:	$0.00

The Current account balance will match the SCU Account Detail from Workday.

My Account: Student can setup Authorized Payer and Parents can update email and password

Activity Details: This is real-time account data so it may differ from monthly billing statement

View activity details

3-Month Payment Plan: Fall Enrollment opens on August 1 & ends on August 21

Transactions: Payment on Student Account

Statements: Billing statement history located here

Santa Clara University

Paradise Vly, AZ 85253-1130

PAYMENT SUMMARY	
Billing Date:	03/01/2024
Statement Start Date:	02/01/2024
Statement End Date:	02/29/2024
Amount Due:	**$23,695.00**
Due Date:	**03/21/2024**

Make checks payable to Santa Clara University

Mail payment to:
SCU Payment Processing
PO Box 550
Santa Clara, CA 95052-0550

- -

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

Mail payment to our SCU PO Box

Statement broken down to posted debits/credits and anticipated financial aid

Statement Activity

Date	Term	Description	Charge	Credit
		Prior Statement Balance	$7,911.00	
02/26/2024	Spring 2024	Housing Contract Swig	$5,989.00	
02/26/2024	Spring 2024	University Enhancement Fee	$218.00	
02/26/2024	Spring 2024	Tuition Undergraduate	$19,529.00	
02/26/2024	Spring 2024	Tuition Insurance Plan	$59.00	
02/15/2024	Winter 2024	Payment - Payment Plan		$7,911.00

Statement Activity: **$25,795.00**

Anticipated Aid

Term	Description	Charge	Credit
Spring 2024	SCU Bronco Scholarship		$1,081.00
Spring 2024	SCU Need-Based Grants		$1,019.00

Anticipated Aid: **$2,100.00**

TOTAL AMOUNT DUE: **$23,695.00**

When To Pay?

❖ **Payment Deadline:**

❖ Is the **21ˢᵗ** of every month for all billed items

❖ Billing is done on actual enrollment so statements can fluctuate

❖ **Term payment deadlines:**

   ❖ **Fall – August 21**

   ❖ Winter – December 21

   ❖ Spring – March 21

❖$100 late fee and financial hold preventing registration will apply for past due balances

Please note…we communicate <u>often</u> with your students. If they remind you timely, a hold should not be an issue.

How To Pay?

❖ **Authorized Payer Portal**: via eCheck, a scheduled payment, or enroll in a term monthly payment plan

❖ **By Mail**: SCU Payment Processing, PO Box 550, Santa Clara, CA 95052-0550. Make sure to include the remittance slip for accurate and timely payment posting

❖ **International Wire Transfers:** quick, safe and secure via FlyWire

❖ **OneStop:** can accept check payments at the counter. Payment kiosks are also available to assist students with online payments.

❖ **529 Plans/Trust Accounts:** Billing statement in PDF format can be easily forwarded. Provider will send payment via check so make sure student name/SCU ID# is on advice. If enrollment verification is required, have provider send form to OneStop for completion. *Many 529 College Savings plans now have a digital distribution option (electronic ACH) which saves time and improves transparency with real-time payment tracking. When requesting a withdrawal from your plan, check with your plan administrator to see if a digital distribution option is available.*

The University does not accept payment via credit card or cash for tuition and fees

Review Quarterly Payment Plan

Process: Select "**Payment Plans**" on the left-hand menu
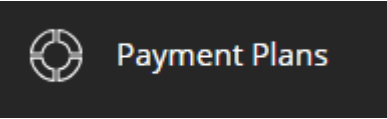
Payment Plans

Click **View payment plan options**

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

Review **Terms and Conditions**. Check the box to **agree** and click **continue**

Payment plan enrollment: $40 enrollment fee is included and is added to the total due for the first payment. Click **Continue**

If you haven't setup your **payment method** with your checking account information, you'll need to provide your bank account information now.

Confirm your bank information, then click **Pay**.

The email address will receive 3 emails from **BursarPayPlan@scu.edu**: 1) A thank you for the first payment 2) A thank you for the $40 enrollment fee 3) you will also receive an email with your next installment due dates and amounts.

Spring 2024 Quarter
UG 3-month Spring Payment Plan

$7,954.84
Payment scheduled today
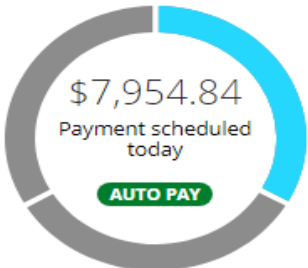
AUTO PAY

Paid $7,898.33 | Remaining $15,909.67

Payment Schedule

✓ $7,898.33
Payment received

2 $7,954.84
Payment scheduled 4/15/24

3 $7,954.83
Payment scheduled 5/15/24

━━━━━━ successfully set up auto pay
You do not have permission to view or edit details.

Plan Details

Enrolled: 3/4/24
Enrollment fee: $40

This shows the amount to be budgeted, the first payment due at the time of enrollment and subsequent payments each month. Click **Enroll in plan** to continue.

Payment Plan Criteria:

Student must be enrolled at SCU.

First payment and payment plan enrollment fee are due when you enroll into the plan.

Total payment plan amount will be based on current account balance minus applicable financial aid.

Enrolling in the payment plan requires a checking/savings account, and are processed via ACH.

Plans are subject to automatic rebalancing on the 5th of each month based on enrollment and/or financial aid changes. This means your monthly payment amount may change accordingly, and you will receive email communication notify you of any such changes.

Participants must enroll into a new payment plan each term. There is no automatic re-enrollment.

Payment Plan Options

❖ Interest-free, modest enrollment fee of $40 per term

❖ Fall plan available August 1

❖ Enroll by August 21 to maximize plan benefits

❖ First payment required upon enrollment

❖ All payments submitted via **ACH only**

❖ Future scheduled payments are **<u>automatically deducted</u>** from your bank account on the **15th** of every month

❖ Plan rebalanced after add/drop to match student account balance. Student and plan owner will be notified of any plan adjustments

❖ **Must re-enroll in plan each term!**

Tuition Insurance Plan
"The Plan"

❖ All undergraduate students enrolled in 12 units or more will be automatically enrolled in "The Plan" offered by A.W.G. Dewar, Inc.

❖ Protection from financial loss due to *complete* medical withdrawal

    ❖ Reimburses 80% of out of pocket tuition cost for any diagnosed medical or mental health withdrawals

    ❖ Housing not included as it will be prorated

❖ Annual Cost: $171 (Fall/Winter/Spring)

    ❖ Students will be charged $57 per quarter

    ❖ Plans are available for summer as well by contacting Dewar directly

❖ Students who wish to Opt-Out of "The Plan"

    ❖ *Must complete the online waiver by the Deadline date: September 22, 2024*

        ❖ *Go to: www.tuitionprotection.com/scu or call (617)774-1555*

    ❖ It is an annual waiver - you only need to do it once per academic year.

    ❖ *Please consider this inexpensive option to protect you and your student's investment in their education!*

Refund Policies

❖ **Tuition Refund policy (for students *completely* <u>withdrawing</u> from Santa Clara University)**
  - ❖ 100% by the end of the first week of classes, less applicable fees (September 27th)
  - ❖ 50% by the end of the second week of classes (October 6th)
  - ❖ 25% by the end of the third week of classes (October 13th)
  - ❖ No further refunds will be granted after the third week of classes

  <u>**Students that drop courses after the first week of class will not receive any tuition refund for those courses.**</u>

❖ **Refunds for credit balances:**
  - ❖ Processed the 2nd week of school (after initial add/drop period) via check or direct deposit
  - ❖ Student account **must** reflect a credit balance
  - ❖ Financial aid must be disbursed and posted, not anticipated
  - ❖ All refunds are provided to the student unless the credit derives solely from a PLUS loan

  Please Note: Students making a single payment to cover multiple terms should contact the Bursar office so that the credit can be held accordingly and applied to future terms.

Enroll in Direct Deposit

Setup direct deposit and get a chance to win SCU Swag!

Throw pillow for your dorm room, athletic sweatshirt, SCU Yeti cup and tumbler and other goodies.

Don't miss out on this opportunity!
Deadline Sept 30th
Winners notified via email.

Homework & Tips

❖ Set up a checking account for your student so they can begin the road to financial responsibility

❖ Have your student set up an Authorized Payer for you and others helping fund their education

❖ Don't forget about FERPA… we are limited to providing information without it

❖ If you choose to opt out of the Tuition Insurance Plan, complete waiver by 9/22/2024

❖ Complete waiver for the Health Insurance by 9/27/2024

❖ Know SCU's refund policies! It can be costly if you don't

❖ Send your students our way. We are here to help!

OneStop Office

❖ An extension of Bursar, Financial Aid and Registrar Offices.

❖ One central location to assist with questions relating to student billing, payments, financial aid and enrollment.

❖ Contact information is simple and easy to remember:
 ❖ **onestop@scu.edu** - **408-551-1000**
 ❖ Available to assist M-F 9:00am - 5:00pm
 ❖ www.scu.edu/onestop

❖ Located first floor of the Admission & Enrollment Services Building

Contact Information

OneStop Office

(408) 551-1000

Email: onestop@scu.edu

Overnight mail address only:

SCU Bursar Office

500 El Camino Real

Santa Clara, CA 95053-0615

Bursar's Office

(408) 551-1000

Email: bursarpayplan@scu.edu

Website: www.scu.edu/bursar