WELCOME...

to the New Parent Presentation

Everything you ever wanted to know about student billing, financial aid, health insurance and more...

Overview

❖ Bursar Office Functions & Website

❖ OneStop Office

❖ **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*

❖ Cowell Health Insurance **$3,030** - how to waive & deadline **(September 22, 2023)**

❖ SCU Sponsored Tuition Insurance Plan "The Plan": **$59.00** per quarter; $**177.00 academic year** - how to waive & deadline **(September 17, 2023)**

❖ Refund Policies - important for both parties

Bursar Office – 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 Billing Workday portal and term payment plans

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

Bursar Website

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, and fees
- Organizing **payment plans**
- Processing student payments, **wire transfers**
- Managing **Student Holds**

2023-2024 New Student - Parent Orientation

2023-2024 Online Bursar's Brochure

Here are a few quick links and how-to's

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

Bursar's Office

SCU Tuition and Fees

Billing

Payment Options

Payment Policies

Refund Policies & Processes

Financial Responsibility

Student Holds

Tuition Protection

1098-T

Workday Training

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

One Stop 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**

  ❖ Office hours M-F 9:00am - 5:00pm
       (phone hours 9:00am - 4:00pm)

  ❖ www.scu.edu/onestop

❖ Located first floor of the Schott Admission & Enrollment Services Building

# FERPA - Family Education Rights and Privacy Act……It's the law
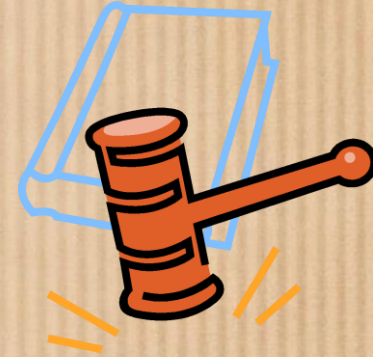
❖ In a nutshell…

    ❖ The University can _not_ 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 in their Workday portal. This release may be submitted at any time during the year.
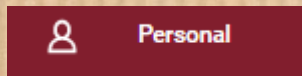
Complete FERPA Release Form

Process

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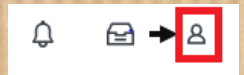
Choose "**Personal**"

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

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 know the security word as they will be asked before providing any information on your account.

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.
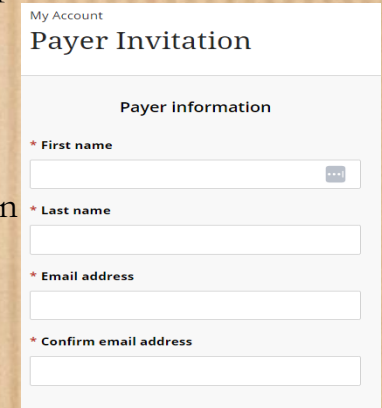
Log into your Workday portal, click the Finances icon.

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.

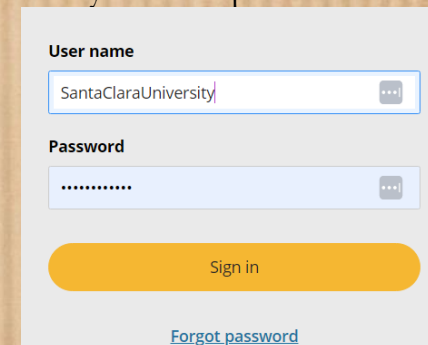Select My Account from the left-hand navigation. Click on Send a Payer Invitation

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. Please make sure they setup the security questions when they first login so they can reset their password should they forget it. If they don't the student will need to reset it. SCU personnel do not have the ability to reset passwords

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

User name

SantaClaraUniversity

Password

•••••••••••

Sign in

Forgot password

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

2023 – 2024 Tuition & Fees

❖ **Annual Tuition Cost: $58,587**

❖ **Per Quarter: $19,529**

❖ **Per Unit** *(less than 12 units):* **$1,627**
   - ❖ *SCU does not accept P/T enrollment, however occasionally a student may only need 1-2 classes to complete their degree.*

❖ **Housing –** rates based on room accommodation & meal plan choice.
   - ❖ Go to **www.scu.edu/housing** *for detailed pricing.*

❖ **University Fees:** University Enhancement Fee: $218 per quarter; $654 academic year

❖ **SCU Sponsored Health Insurance: $3,030** *(Fall Statement)*
   - ❖ *Health insurance is mandatory!* **Complete the online waiver by the deadline date: September 22, 2023 …Go to: www.scu.edu/cowell/insurance**

❖ **SCU Sponsored Tuition Insurance Plan "The Plan":**
   - ❖ $59.00 quarter; $177.00 academic year. ***Complete the online waiver by the deadline date: September 17, 2023 … Go to: www.tuitionprotection.com/scu***

Billing – what to expect

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

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

  ❖ ***Credits:*** *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.

NOTE – FERPA and Authorized Payer are two separate permissions

Overview

My Account

Overview

Activity Details

Auto Pay

Payment Plans

Make a Payment

Transactions

Statements

Sign Out

Santa Clara University

Summary

Your account does not currently have any outstanding charges.

Balance from prior bill	$0.00
Account activity since prior bill	$0.00
Current account balance	$0.00
Anticipated aid	$0.00
Projected account balance	$0.00

The current account balance will match what the student sees in Workday.

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

View activity details

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

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

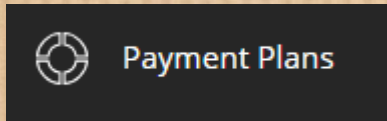**Transactions**: Payment on Student Account

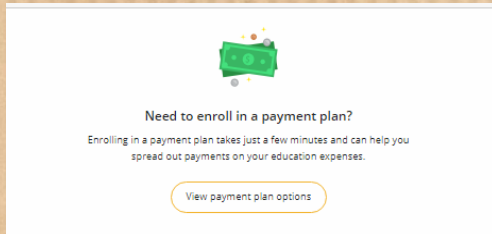**Statements**: Billing statement history located here

Review Payment Plan

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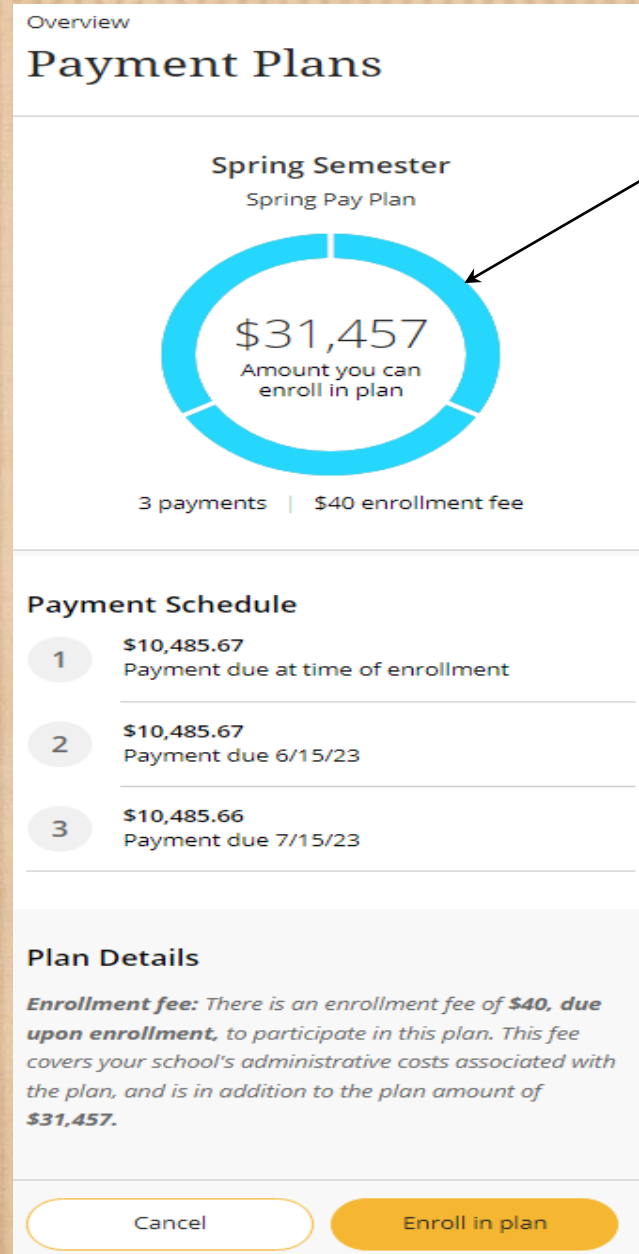

Click *View payment plan options*

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.

Overview
Payment Plans

Spring Semester
Spring Pay Plan

$31,457
Amount you can enroll in plan

3 payments | $40 enrollment fee

Payment Schedule

1   $10,485.67
    Payment due at time of enrollment

2   $10,485.67
    Payment due 6/15/23

3   $10,485.66
    Payment due 7/15/23

Plan Details

*Enrollment fee: There is an enrollment fee of **$40, due upon enrollment**, to participate in this plan. This fee covers your school's administrative costs associated with the plan, and is in addition to the plan amount of **$31,457**.*

Cancel | Enroll in plan

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.

Santa Clara University

Students Name   ID#
123 Street Address
City State and Zip

PAYMENT SUMMARY	
Billing Date:	04/26/2023
Statement Start Date:	03/01/2023
Statement End Date:	04/27/2023
Amount Due:	**$6,650.25**
Due Date:	**05/21/2023**

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.

Statement Activity

Date	Term	Description	Charge	Credit
		Prior Statement Balance	$6,650.25	

Statement Activity: **$6,650.25**

Anticipated Aid

Term	Description	Charge	Credit

Anticipated Aid: **$0.00**

TOTAL AMOUNT DUE: **$6,650.25**

Mail payment to our SCU PO Box

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

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?

❖ **<u>Authorized Payer portal</u>**: via eCheck, a scheduled payment, or enroll in a term monthly payment plan

   ❖ Please note online billpay from your banking institution will send a paper check. Make sure to set-up our correct mailing address and have student name and SCU ID# on remittance.

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

❖ **<u>International Wire Transfers:</u>** quick, safe and secure via FlyWire

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

❖ **<u>529 Plans/Trust Accounts:</u>** 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 student request Enrollment Verification form from the Office of the Registrar.

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

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 is 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: $177 (Fall/Winter/Spring)

  ❖ Students will be charged $59 per quarter

  ❖ Plans are available for summer as well by contacting Dewar directly (617) 774-1555

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

  ❖ **Must complete the online waiver by the Deadline date: September 17, 2023**
  Go to: www.tuitionprotection.com/scu or call (617)774-1555

  ❖ This 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 22nd)**

   ❖ 50% by the end of the second week of classes **(September 29th)**

   ❖ 25% by the end of the third week of classes **(October 6th)**

   ❖ 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 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

   ❖ We do not refund for overpayments on a student's account

Please Note – refunds will be processed automatically each term. If you are paying in advance for future terms, please let us know.

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 **9/17/2023**

❖ Complete waiver for the **Health Insurance by 9/22/2023**

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

❖ Use Chrome when logging in to the Authorized Payer portal & make sure to check your pop-up blocker

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

Contact Information

Bursar Office

Email: bursarpayplan@scu.edu

Bursar Website: www.scu.edu/bursar

OneStop Office

Email: onestop@scu.edu

One Stop Website: www.scu.edu/onestop

Financial Aid Website: www.scu.edu/financialaid

Overnight payment mailing address only:

Santa Clara University

SCU Bursar Office

500 El Camino Real

Santa Clara, CA 95053-0615