**SDAS Orientation Video**

**Hello Welcome Slide:**

Hello and welcome, we are Student and Departmental Account Services, or SDAS for short. We would like to introduce you to some of the services our office provides and important information about managing your student account. We understand that navigating university finances for the first time can feel overwhelming and confusing so we have created a checklist in order to help simplify the information you need to know. We will begin with a quick introduction and overview of our website and then walk through the details of the checklist. Here at SDAS we strive for student success by providing financial tools and literacy to ensure a smooth transition, while beginning your journey here at Northern Arizona University.

**What is Student Accounts?**

So what is Student Accounts? We are responsible for most inquires involving payments and fees. Specifically, we help with billing and payment of tuition and fees, setting up tuition payment plans, emergency loans, tuition refunds, setting up direct deposit, collections and delinquent accounts, 1098-T tax credit information, and third party or sponsored billing.

**SDAS Homepage:**

Our website offers a wealth of information and is a resource for you to use to help navigate your university finances. To get to our website, go to nau.edu/sdas .

On our site, you will find information about current tuition rates, additional fee descriptions, important payment dates, information about payments and policies, Frequently Asked Questions and much more. We have also provided links for you to be able to quickly access your account, make payments as a student or Authorized User, and view our video tutorials.

The Student Account Checklist for Success is also displayed here to help guide you through the steps needed to ensure all financial items are completed. At this time, we would like to review each checklist item.

**Authorized Users:**

The first item on the checklist explains how students can add an authorized user. We understand students may have other individuals assisting them with finances, by adding them as an Authorized User it will allow them to remain informed on the account activity. An Authorized User is allowed to view and pay bills, access e-bills, and sign up for text message alerts through the TouchNet payment system using their own unique login information. By clicking on the "Authorized User" link you will be directed to the authorized user video tutorial which provides more information about Authorized Users and offers step by step instruction on how to enroll. Once you become an Authorized User, you can access the payment link by selecting the "Make a payment on behalf of your student as an authorized user” link. Remember, students are the only ones who can grant authorized user access. This will be a good time to have a conversation about who needs access to make online payments to a student account.

**FERPA** **SCREENCAPTURE:**

This leads into our next checklist item, the Family Educational Rights and Privacy Act, or better known as FERPA. Under the checklist, is a link that will direct you to the Registrar's website, where a full description of FERPA is provided.

This is also where the form can be completed and submitted electronically. This release form allows anyone who the student approves, to obtain information about their student account. Please keep in mind, only the student may complete and submit this form. It is up to the student to decide who they will allow to obtain information about their account. Once a FERPA Release has been added we can discuss account specific information over the phone or in person with the individual named on the release. Another thing to remember is that the FERPA release form is separate from the Authorized User access. Please view our FERPA tutorial for a more detailed description.

**Direct Deposit:**

The next checklist item, provides information regarding direct deposit. Direct deposit is the fastest, most secure way to receive refunds. By selecting the “Direct deposit” link provided here, it will direct you to our "Benefits of Direct Deposit" page.

We not only discuss the benefits of direct deposit, but we also provide a link to LOUIE where you can sign up. As it notes on this page, if the student does not sign up for direct deposit, refunds will be processed as a paper check, and mailed to the address provided in LOUIE. Once in LOUIE you will need to select the “Enter/Edit Direct Deposit” link, to enter your routing number and account information.

**Important Payment Dates:**

Next, we will discuss important payment dates. It's always a good idea to mark your calendar in advance with due dates for current and future terms. By selecting the “important payment dates” link provided here it will direct you to our important payment dates page with individual term dates. Each term will provide specific due dates, and additional information for those due dates.

The Office of the Registrar's website provides additional calendars with important academic and enrollment dates.

**Tuition Payment Plan:**

The next checklist item is the Tuition Payment Plan. If you're unable to pay tuition and mandatory university fees in full by the due date, you have the option to enroll in our Tuition Payment Plan. By selecting the "payment plan" link provided here, you will be directed to our payment plan page. This page will explain all of the details surrounding our Tuition Payment Plan. For example, you can see here it will break up the total tuition into multiple installments being due on the 15th of each month. Please keep in mind this payment plan is for tuition only and includes an enrollment fee that is due with the first installment. Housing and most meal plans are automatically broken into 4 equal installments.

To enroll in the Tuition Payment Plan you will need to log into your LOUIE account. We have provided a link to LOUIE on this page for easy access. Once in LOUIE, you will need to select the “Enroll in Payment Plan” link under the “Finances” section. This will provide a 4 step process to enroll. When enrolling please be sure to select the correct term. The final step will show each installment amount and the respective due date.

**Checking your Balance:**

The next checklist item is checking your balance each month. Students can view their most current account balance in the Louie Student Center under the “Finances” section. By selecting “Account Inquiry”, the student will be directed to a detailed breakdown of their account summary. Under the “Charges Due” tab the students can see their totals by due date, and a listing of each outstanding charge. The “Payments” section will allow you to view a record of each payment applied to the account. By clicking on the dollar amount under the “Paid Amount” column, further detail will be displayed, describing charges the payment was applied to. Some additional tabs include, “Pending Aid”, where a listing of pending financial aid can be found by term and “Activity, which displays a history of charges posted and payments received. The students can also select “Make a Payment”, to be directed to the TouchNet payment system. You can see a walk-through of the “Account Inquiry” section again by viewing our “How to read your account” video tutorial.

**eBills:**

Our office is committed to maintaining a green campus and, as such, we will provide invoice and billing information digitally whenever possible. Every month our office will generate an ebill for each student holding a balance. The ebills are generated around the 15th of each month, and are a snapshot of the account, at that time. Students and Authorized Users will receive an email notifying them when a new eBill has been generated. When the eBills are generated, they will be viewable in TouchNet, under “View Statements” or “My Account” then “Statements”. After selecting one of the options it will provide you a listing of eBills that have been generated with the most current eBill at the top of the list. When viewing eBills, be sure that your pop-up blocker is turned off and your pdf viewer is up to date. For a detailed look at eBills, check out our “How to Read Your eBill” video. By regularly checking your account, this will ensure that you are staying on track with paying your charges on time.

**When to Contact OSFA:**

Next, we want to briefly discuss how and when to contact the Office of Scholarships and Financial Aid if you are unsure that your financial aid documentation has been completed. Their email and phone number have been listed here, for your convenience. Be sure to check out their website, for further information and important dates such as the Financial Aid Disbursal Date for a term. Reasons to contact Financial Aid would be questions regarding; applying for aid, scholarships, scholarship priority dates, accepting and declining your financial aid awards, and FAFSA verification.

**To-Do List items:**

Now we would like to discuss the "To-Do" list items, located in your Louie Student Center. You can log into LOUIE and your Student Center by clicking the “Louie” link provided. Once in the Student Center, you will see the To-Do list, located on the right hand side. Each To-Do list item can be opened to provide further instructions and links to assist with completing each item. Each To-Do list item is very important and should be reviewed in detail to ensure all forms and necessary information are gathered.

**Title IV:**

One example we have here is the "Financial Aid Title IV Authorization". As a recipient of Federal Title IV student aid, you have options on how some of your aid is applied to your student account. Based on federal regulations, Northern Arizona University will apply your aid first towards: current term tuition, mandatory fees, and housing and meal charges contracted with the university. To apply your remaining Title IV funds to non-eligible Title IV charges, please complete the Title IV authorization. This will allow Title IV funds to pay current term charges such as: transportation and department fees or printing and health center charges as well as up to $200 of prior aid year charges. Each “To-Do” list item is very important, and should be reviewed in detail, to ensure all forms, and necessary information is gathered.

**1098-T Form:**

The next checklist item reviews the 1098-T tax form. This form reflects payments received for qualified tuition and related expenses within a calendar year, as well as any gift or aid received. It may be used to claim an education tax credit or deduction. These forms are viewable in the Louie Student Center under the ‘Finances’ section. We are encouraging students to opt into the electronic version of the 1098-T form, to maintain a green campus. To opt into the electronic version, you will need to select “Make a Payment” in the Louie Student Center. The first screen that will appear, is the NAU Electronic Business Agreement. By selecting the checkbox, you will consent to receive your 1098-T electronically. If you choose to consent, this page will no longer appear after selecting "Make a Payment".

**Read your NAU email:**

The final checklist item is a reminder to read your NAU e-mail on a regular basis. This is how all NAU departments will communicate with students. When it comes to contacting an office through email, we also recommend using your NAU email. Due to privacy regulations, we are limited in the information that can be sent to a non-NAU email regardless if there is a FERPA release on file.

Access to your NAU e-mail, can be located in the “MyNAU” portal. By clicking on this link, it will take you to your own personal homepage which includes access to your email, class schedule, “To-Do” list items, NAU alerts, your Blackboard learning center and many other NAU resources. Please remember NAU considers your NAU email the official form of communication.

**Payment Application:**

Now that you have learned about navigating and managing your account, another important thing to be aware of is how payments are applied. Personal payments apply to the student account differently than financial aid. It is good to keep both in mind as you are preparing your finances for the term.

To understand how payments are applied, we can take a look at an example account with its due charges broken up by month and type.

When personal payments, including eCheck, credit card and check payments, are made, the payments are applied in due date order. If multiple types of charges are due at the same time, the payment will be applied to tuition charges first, then housing, Meal Plan and finally department charges.

Financial aid, on the other hand, is regulated by entities such as the Board of Education and private donors, and can have specific guidelines as to what it can apply to. All Financial Aid will apply by charge type, regardless of due date. When aid disburses on the account it will first apply to all tuition charges, then all Housing charges, before moving onto Meal Plan charges, and finally department charges, if Title IV authorization has been provided.

What this means is, if you have a partial payment in financial aid, it may be that future charges are paid, but some current charges remain outstanding. It is always our recommendation to check your account after financial aid disburses or after receiving a refund of excess financial aid funds, in order to make sure all charges are covered.

**FAQs:**

If there are any questions you have that were not addressed in this video, we recommend checking out our FAQs. Our general FAQs review the most commonly asked questions ranging from address changes to which department to speak to regarding charges that may appear on the student account. Our other FAQs cover more details about who we are as an office, frequently asked payment questions and tax credit information.

**Contact Information:**

In conclusion, we would like to thank you for taking the time to learn more about the services provided here at SDAS. We look forward to supporting student success throughout your journey here at Northern Arizona University. Thank you!