

WEBINAR STARTING SOON!



Learn how to access student
information, like finances & academics!



TRIBE TRANSITION WEBINAR

STUDENT ACCOUNTS

JOIN US FOR FAMILY ORIENTATION

FRIDAY, AUGUST 21

Family Orientation is designed to help parents, families and supporters understand the W&M transition, learn about key campus resources and feel more confident supporting their student this fall.

LEARN MORE & REGISTER!



[WM.EDU/ORIENTATION](https://wm.edu/orientation)



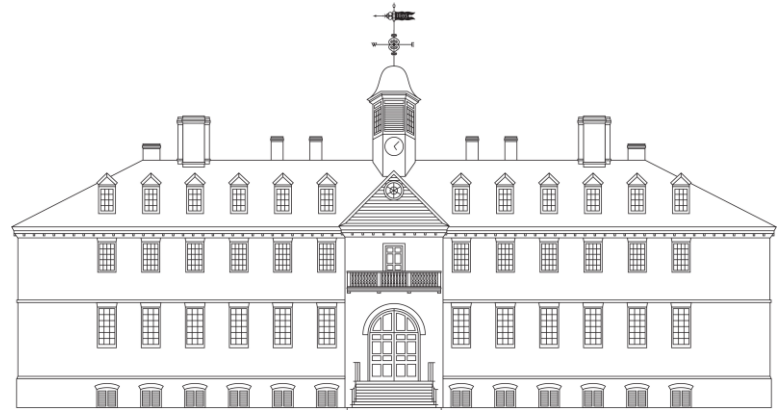
W&M Bursar's Office



What does the Bursar's Office do?

www.wm.edu/studentaccounts

- Apply charges/credits and payments to students' accounts
- Cashier's Office
- Prepare and provide eBills
- Manage Payment Plans
- Apply holds and late fees
- Process Third Party payments
- Process refunds
- Prepare 1098t
- Verify Authorizations
- Manage eServices



APPLY CHARGES and POST PAYMENTS

Charges

- Tuition and Fees
- Housing and Meal Plans
- Health Insurance
- Miscellaneous Fees (student health center, library, ect.)
- www.wm.edu/tuitionandfees

Payments

- Cash, Check or Money Order
 - In-person payments at the Cashier's Office
- E-payments (eServices)
 - Electronic Check (checking/savings)
 - Credit Card via PayPath
 - 2.95% service charge
 - 4.25% international charge
 - Includes debit cards
- Third Party Payment
 - Military, 529, and outside scholarships
- Flywire (international)
- www.wm.edu/paymentmethods

Student Health Insurance Charges

- Waive the insurance fee by supplying proof of current insurance coverage by 7/31
- Opt-In to obtain a student health insurance plan by 7/31
- If a waiver is not submitted or opt-in is chosen, the charge will appear on the August eBill
- For more information, visit <https://www.wm.edu/sites/studentinsurance/>

Rates

- Fall: \$1,522.00
- Spring/Summer: \$2,110.00
- Summer: \$915.00

Payments

- Pay the entire semester by the due date or pay with our internal payment plan
- William and Mary does not endorse a specific tuition insurance plan, however, there are many plans available for purchase independently

Payment Addresses

Payment sent by standard mail (USPS)

William & Mary
Bursar's Office/Student Accounts
PO Box 8795
Williamsburg, VA 23187-8795

Payment sent via express or courier service

William & Mary
Bursar's Office, 108 Blow Memorial Hall
262 Richmond Road
Williamsburg, VA 23186

eBills

www.wm.edu/ebillinfo

- Monthly statements are available around the 10th of each month reflecting previous balances and activity since the last statement
- Due dates are the 1st of the following month
- Email notifications sent to students and authorized users
- Detailed statement available on eService

1st Bill of Each Semester

Semester

Fall

Bill Date*

July 11 – 13th

Due Date*

August 1st

Spring

December 12 – 15th

January 5th

Summer

May 10 – 13th

June 1st

* Dates are estimated. Weekends, holidays, or other issues can alter dates by 1 or 2 days

Payment Plan

- Current charges (tuition, housing, meal plans, etc.), minus any funding or expected funding, divided into 4 equal monthly payments
- Enrollment through eServices each semester
- Payment Plan is not available during the Summer semester
- Payment plan enrollment:
 - Opens the day the first eBill is available each semester
 - Closes on the last day of the undergraduate add/drop

Payment Plan

- \$50 enrollment fee per semester
- \$25 late payment fee each month the payment is late
- Interest Free
- Payment due date is the 1st of each month
- Scheduled payments vs manual payments
 - Scheduled Payments – Automatically withdrawn on due date from specified payment method
 - Manual Payments – Must be manually processed by user each due date

Payment Plan

- Automatically adjusts the remaining payments for additional charges or credits.
- If multiple payers need to make payments, please have the student create the plan under their name and select manual payments. The student can add additional authorized users so each can log in to make payments when needed.
- Payments directly from 529 plans would need to be scheduled manually by the plan owner to arrive by the payment due date
- For additional information, see: [Payment Plan](#)



Third Party Payments

Outside Scholarship

If you apply for W&M financial aid:

- Notify the university of all outside scholarships by completing the form below. This includes; tuition assistance plans, third party payors and/or any other financial resources received, even if paid directly to the student.
- Sources include scholarships from high schools, private clubs, agencies, corporations, organizations, and tuition benefits from a parent's employer.
- Eligibility for financial aid may be reassessed upon notification of any outside resource not previously communicated to comply with regulations and institutional policies.

Complete the 'Outside Scholarship and Resource Reporting Form' here

<https://wmdocusign.wm.edu/url/go/finaidoutsidescholarship>

Third Party Payments

Outside Scholarship Cont.

- Credit memo's can only be granted for award letters without stipulations.
- Unless otherwise stated, scholarships are split between the Fall and Spring semester
- If the outside scholarship is a 'tuition only' award, it may conflict with other 'tuition only' aid. Contact your awarding entity to inquire if your scholarship is tuition-only and follow up with the Financial Aid office if it is. Non-restrictive scholarships can cover other charges and have more freedom.
- Any internal W&M Scholarship question or concern should be directed to Financial Aid

Complete the 'Outside Scholarship and Resource Reporting Form' here

<https://wmdocusign.wm.edu/url/go/finaidoutsidescholarship>

Third Party Payments, cont.

Military Benefits

vabenefits@wm.edu

- Process starts with the [VA Benefits Information Sheet](#)
- Benefits paid directly to the university will be notated on the student's account as expected funds
- Benefits must be confirmed each semester
- Visit [Using Military Benefits](#) for more information.



Third Party Payments, cont.

VA 529

VA529 Prepaid – Covers In-State, Undergraduate Tuition and Fees

1. Notify the plan
2. Our office will receive the semester roster
3. Benefit will post to the student account

VA529 InVest –More Flexible, can cover housing, meal plans, etc.

1. Notify the plan
 2. Request a disbursement to William and Mary. You can use your first eBill for documentation.
 3. Payments are transferred directly to W&M by ACH. Contact your plan for payment timing.
-

Out of State 529 plans

1. Notify your plan.
2. Request a disbursement. Use your first eBill for documentation.
3. If the Federal school code is needed please use 003705
3. Payments are received by check or Flywire (check your plan for participation) Include ID/Name

- If the payment is delayed until after the eBill statement due date, you may need to pay your balance and have your student request a refund once the 529 funds are received. You could also consider a payment plan to reduce the initial payment until the 529 funds are received

Refunds

www.wm.edu/refund

Direct Deposit

Secure, Fast, Convenient

Online set-up via eServices/Electronic Refunds

- **All Title IV** (Federal Financial Aid) credit balances will be automatically refunded to the student after the first day of classes.
- **Other refunds** resulting from overpayments, 3rd-party payments, or changes to charges must complete a refund request form after the first day of classes. The request form is located on the webpage referenced above. Only students have access to the form.

Holds and Late Fees



- Past Due balances **over** \$100 will have holds that will prevent registration and adjustments to schedules
- Late Fees – For students who are **not** enrolled in the payment plan, late fees are assessed once a semester at 10% of your balance up to \$100.00

1098-T Tax Form

- 1098-T tax forms will be available in eServices by January 31st
- The tax form is not mailed but can be downloaded in eServices
- Students must give authorized users permission to view or download the 1098-T
- For more information, see: [1098T Info](#)

Verifying Authorization

Passphrase

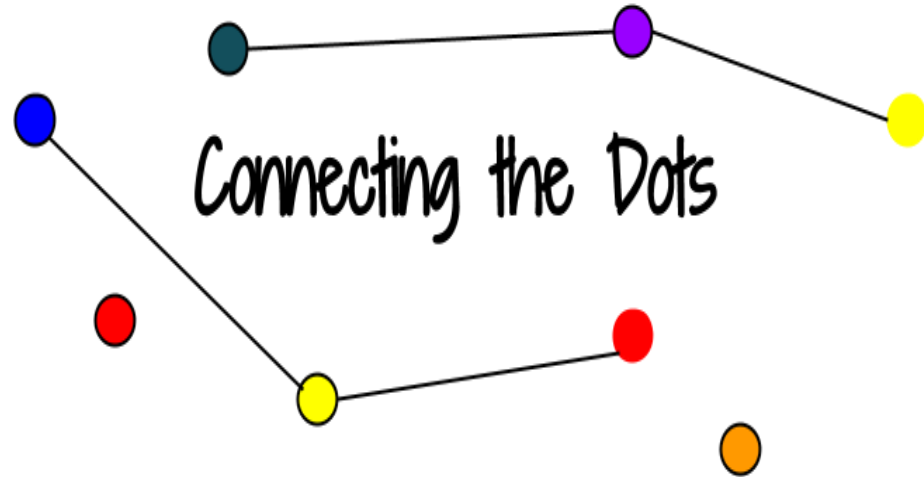
- Based on Federal FERPA regulations
- Required to communicate with our office in any manner.
- Requested by the student
- Sent directly to the person it was requested for
- Passphrase words are person specific
- Issues with passphrase? Contact Family Engagement

Authorized User

- Required to log into eServices
- The student adds the authorized user's e-mail in eServices under "authorized user" to initiate user to be set up
- Authorized user will have their own account login
- Issues with authorized user account? Contact Student Accounts

eServices

- eServices is the student and authorized user's access to all their student account information and services
- Once logged into eServices you can:
 - See your balance and expected aid
 - Access your statements
 - See account detail per semester
 - Enroll into the payment plan
 - Make payments by ACH or Credit/Debit Card
 - Set up direct deposit for refunds
 - Download the 1098-T tax document



For additional information please see: [eServices](#)

eServices



[My Account](#) [Make Payment](#) [Payment Plans](#) [Deposits](#) [Refunds](#) [Help](#)



Announcement

- The first Fall 2022 semester eBill statement will be published July 11, 2022. You will see charges, financial aid and other data posted to your W&M Student Account beginning July 6, 2022. You may not see a complete picture of your account until July 11th when the statement is published. You and your authorized users will receive an email when your statement is available.
- Your Fall 2022 semester bill will be due 08/01/2022.
- The W&M Tuition Payment plan will also be available on the eBill date of July 11th.
- Students please sign up for Electronic Refunds under 'My Profile Setup' to have your W&M Student Account credit balances refunded directly to your bank account.

I would like to pay...

Select Option



Go!

Student Account

ID: xxxxxxxx

Balance	\$30,365.00
Estimated Financial Aid	\$4,144.00
Balance including estimated aid	\$26,221.00

[View Activity](#)

[Enroll in Payment Plan](#)

Statements

Your latest eBill Statement
(7/13/22) Statement : \$30,365.00

[View Statements](#)

Your latest 1098-T Tax statement
2021 1098-T Statement

[View Statements](#)

My Profile Setup



[Authorized Users](#)



[Personal Profile](#)



[Consents and Agreements](#)



[Electronic Refunds](#)

Term Balances

Fall 2022

\$26,221.00

Contact Information

Mailing address

William & Mary
Bursar's Office
PO Box 8795
Williamsburg, VA 23187-8795

Email Address

Bursar@wm.edu

Express or Carrier Service

William & Mary
Bursar's Office
262 Richmond Road
Williamsburg, VA 23186

Direct Phone Number

757-221-1220