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, tutoring, etc.)
• www.wm.edu/tuitionandfees

Payments
• Check or Money Order
  ▪ In-person payments at the Cashier’s Office
• Flywire
• Electronic Check (checking/savings)
• Credit Card via PayPath
  ▪ 2.85% service charge
  ▪ Includes debit cards
• www.wm.edu/paymentmethods
eBills

www.wm.edu/ebillinfo

• Monthly statement available around the 10\textsuperscript{th} of each month reflecting previous balances and activity since the last statement

• Due dates are the 1\textsuperscript{st} of the following month

• Email notifications sent to students and authorized users

• Detailed statement available on eServices
# 1st Bill of Each Semester

<table>
<thead>
<tr>
<th>Semester</th>
<th>Bill Date*</th>
<th>Due Date*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall</td>
<td>July 10 – 13th</td>
<td>August 1st</td>
</tr>
<tr>
<td>Spring</td>
<td>December 12 – 15th</td>
<td>January 3rd</td>
</tr>
<tr>
<td>Summer</td>
<td>May 10 – 13th</td>
<td>June 1st</td>
</tr>
</tbody>
</table>

* 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 enrollment opens the same day the first eBill is available each semester & closes the last day of undergraduate add/drop
Fees - $50 per semester enrollment fee and $25 for each late payment

Due Dates – The first 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  ▪ Scheduled Payments – Automatically withdrawn on due date from specified payment method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

For additional information, see: Payment Plan
Holds and Late Fees

• Balances less than $100 will have holds that prevent obtaining transcripts or diplomas.

• Balances over $100 will have holds that will prevent registration, adjustments to schedule, and obtaining transcripts or diplomas.

• 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
Third Party Payments

Outside Scholarship

- Process starts with the Bursar’s Office. Send payments directly to the Bursar’s Office or email award letters to bursar@wm.edu
- Payments can be sent directly to university
- Award Letters, without stipulations, can be memoed/applied as expected funding
- Unless otherwise stated, scholarships are split between the Fall and Spring semester
- Scholarship invoices are processed after add/drop
- Any W&M Scholarship questions or concerns should be directed to Financial Aid
Military Benefits

- Process starts with Veteran Benefits – vabenefits@wm.edu
- Benefits paid directly to the university will be notated on the student’s account as expected funds
- Benefits must be confirmed each semester
Third Party Payments, cont.

**VA 529**
- Prepaid – Once student notifies 529 plan of intent to attend W&M, we will receive a report listing the student. Once we receive the report, we will post the benefit on the student’s account as VA529 Prepaid funds. Prepaid will cover tuition and mandatory fees.
- Invest – Notify of intent to attend W&M. You can use your first eBill as backup. Payments are transferred directly to W&M

**Out of State 529 plans**
- Use your first eBill as your backup to submit to your 529 plan
- Payments can be mailed directly to the university
- Have 529 plan include the student’s ID number
Refunds
www.wm.edu/refund

• If a student has a credit balance, a refund can be issued to the student
• Direct deposit vs check
  ▪ Direct deposit is more secure
  ▪ Direct deposit faster refund
  ▪ Only student can set up direct deposit or request refunds
  ▪ The student can list any bank account to receive the refund
• Direct Deposit can be set up using the ‘Electronic Refunds’ section in eServices
• All title IV credit balance will be refunded back to the student automatically
• Non-title IV credit balance can be refunded per the student’s request. The refund request form is located on the Student Account webpage under Refunds – “Complete this online form to request a refund”
• Processed after the first day of classes
1098-T Tax Form

• 1098-T tax forms are processed in January and available prior to January 31st
• The tax form is not mailed but will be available on eServices to download
• Students must give authorized users permission to view 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 Dean of Students

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

- 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...

Student Account

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

View Activity Enroll in Payment Plan

My Profile Setup

Authorized Users
Personal Profile
Consents and Agreements
Electronic Refunds

Term Balances

- Fall 2022: $26,221.00

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

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

**Mailing address**
William & Mary
Bursar’s Office
PO Box 8795
Williamsburg, VA 2318-8795

**Express or Carrier Service**
William & Mary
Bursar’s Office
262 Richmond Road
Williamsburg, VA 23186

**Email Address**
Bursar@wm.edu

**Direct Phone Number**
757-221-1220