CONNECTIONS ORIENTATION

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Director
Office of Student Accounts

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Student Account Coordinator
Office of Student Accounts

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Customer Service & Perkins Loans
Office of Student Accounts
What do we do?

We receive ALL payments on campus and deposit them into the correct accounts.

Office of Student Accounts
(OSA)

Location: Stratton Administration Center 2nd Floor
(610) 683-4133 Office of Student Accounts
Email: studentaccounts@kutztown.edu
OSA Functions

- Invoicing – online only
- Charges
- Payments
- Refund Issuance – if due
- Disbursement of aid awarded and authorized by the Financial Aid Office
- Intent to Attend / Terms & Conditions monitoring
- Deferment options excluding FA – Employer Reimbursement, Military, 529/TAP
- Military Funding Questions
- Scholarship awards (submit copies to Office of Student Accounts)
- Payment Plan guidance for Tuition Pay
- Bear Bucks / Flex additions – online and in our office
Consent to Disclose Form / FERPA

• *Family Educational Rights and Privacy Act*

• Student MUST give the school permission to speak to any third parties (*including* parents). This includes sharing balance due and aid information.

• Complete the FORM today!
  • Located on the Registrar’s Office website (link on ours)
Invoicing

- **Monthly** (sometimes more often)
  - If there is *any* activity (charges or payments)

- **Online ONLY in MyKU** (pdf document)

- **Students emailed via KU Email when ready!**
  - Email contains detailed instructions & common needs

- **Due Dates:**
  - **Fall 2015** (Invoices prepared by July 13th – due August 3, 2015)
  - **Spring 2016** (Invoices prepared early Dec.– due January 4, 2016)
  - **Summer and Winter** (Payment due in 7 days of registration)
and more Invoicing...

- Payment Plans **MUST** be in good standing to count.
- Financial Aid **MUST** show as **Pending Aid** to count.
INVOICING

Office of Student Accounts
### Charges Due

**Summary of Charges by Due Date**

You have no outstanding charges at this time.

<table>
<thead>
<tr>
<th>Invoice Date</th>
<th>Invoice Number</th>
<th>Invoice Amount</th>
<th>Due Date</th>
<th>Print Invoice</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/14/2014</td>
<td>KTOWN 0000399065</td>
<td>4587.50</td>
<td>08/01/2014</td>
<td>Print Invoice</td>
</tr>
<tr>
<td>07/21/2014</td>
<td>KTOWN 0000408572</td>
<td>0.00</td>
<td>08/01/2014</td>
<td>Print Invoice</td>
</tr>
<tr>
<td>08/22/2014</td>
<td>KTOWN 0000418192</td>
<td>0.00</td>
<td>08/23/2014</td>
<td>Print Invoice</td>
</tr>
<tr>
<td>09/04/2014</td>
<td>KTOWN 0000428208</td>
<td>0.00</td>
<td>09/05/2014</td>
<td>Print Invoice</td>
</tr>
<tr>
<td>10/03/2014</td>
<td>KTOWN 0000438155</td>
<td>-4587.50</td>
<td>10/04/2014</td>
<td>Print Invoice</td>
</tr>
<tr>
<td>12/04/2014</td>
<td>KTOWN 0000454380</td>
<td>4549.50</td>
<td>01/02/2015</td>
<td>Print Invoice</td>
</tr>
<tr>
<td>12/19/2014</td>
<td>KTOWN 0000463077</td>
<td>0.00</td>
<td>01/02/2015</td>
<td>Print Invoice</td>
</tr>
<tr>
<td>01/28/2015</td>
<td>KTOWN 0000472249</td>
<td>0.00</td>
<td>01/29/2015</td>
<td>Print Invoice</td>
</tr>
<tr>
<td>02/16/2015</td>
<td>KTOWN 0000482160</td>
<td>-4549.50</td>
<td>02/17/2015</td>
<td>Print Invoice</td>
</tr>
</tbody>
</table>

**Office of Student Accounts**
**Invoice:** KTOWN 0000454380  
**Invoice Date:** December 4, 2014  
**Amt Due (USD):** $0.00

**Prior Balance (USD):** $0.00

### Invoice Items

<table>
<thead>
<tr>
<th>Item Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transportation</td>
<td>35.00</td>
</tr>
<tr>
<td>Health Center</td>
<td>111.00</td>
</tr>
<tr>
<td>SGA</td>
<td>122.50</td>
</tr>
<tr>
<td>Rec Center</td>
<td>133.00</td>
</tr>
<tr>
<td>Student Union</td>
<td>186.00</td>
</tr>
<tr>
<td>BOG Tech Fee</td>
<td>211.00</td>
</tr>
<tr>
<td>Instructional Service</td>
<td>341.00</td>
</tr>
<tr>
<td>PA Res Undergraduate Tuition</td>
<td>3,410.00</td>
</tr>
</tbody>
</table>

**Current Activity:** $4,549.50

**Anticipated Aid Total:** $4,720.00

**Ending Account Balance:** $0.00
Kutztown offers **THREE payment plans**!

Use Estimated Figures until actuals are known – Fin Aid & Student Accounts can help! Adjust later (up or down) at no cost to you directly with Tuition Pay.

- **5-pay** begins **May 1st** (May, June, July, Aug & Sept)
- **4-pay** begins **June 1st** (June, July, Aug & Sept)
- **3-pay** opens **July 7th** (July 31, Sept 1 & Sept 30)

$35 enrollment fee per each semester
Adjustments & cancellations can be made at no cost to you
**Special plans exist for Summer & Winter sessions**

*Failure to participate in the payment plan or to make the payment in full may result in late fees, restrictions from future enrollment & freeze on transcripts until paid*
Payment Methods

• In Office
  • Cash, Check, or Money Order

• Make checks payable to:
  Kutztown University
  Attn: Office of Student Accounts
  PO Box 730
  Kutztown, PA 19530

• Online-Credit Card
  **Credit card 2.75% processing fee
  OR

• Electronic Check (Routing / bank account # - savings OR checking)
  **FREE (unless returned for NSF or an un-locatable account)
529 plans / TAP

• Apply with your provider directly using the invoice online in MyKU
  • You can have them mail the payment to us.
  • If you are submitting for outside housing or books, most providers allow for that payment to go to the student directly.

• Request checks payable to:
  Kutztown University
  Attn: Office of Student Accounts
  PO Box 730
  Kutztown, PA 19530

• **Provide OSA with copy of request form showing amount and student name.
  • We can then secure the schedule if that amount is all that’s due.
  • Yes, if there is pending aid not yet in, that’s ok we add it all together!

Office of Student Accounts
Military Benefits?

- VA Release Form required in the Registrar’s Office
  - Cannot certify students without it or accept any military funding.
- Direct Payments – Funds that come directly to KU can be deferred.
  - Chapter 31, 33, Yellow Ribbon, Tuition Assistance, EAP
- In-Direct Payments – Funds that go home to the soldier cannot be deferred.
  - Chapter 35, Chapter 30, 1606/1607, kickers, etc.
- Any balance not covered by Direct Military Benefits must be paid in full by the due date assigned, or we must be able to verify pending aid or satisfactory payment plan.

  Several double-dipping rules apply when mixing benefits – ask for help!

Office of Student Accounts
After students are invoiced, there are some actions required even if they make payment in full. The payment will not clear these items.

- **Intent to Attend**
  - Student is agreeing they are attending and accepting financial responsibility.
  - No financial aid can be received if this is not done.

- **Terms & Conditions**
  - This will block access from the Student Center until accepted.
  - Verify address, opportunity to opt out of emergency notifications AND
  - Accept the Terms & Conditions (pymt, collections, withdrawal, etc.)
Intent to Attend

Office of Student Accounts
Refunds

Should receive 2 weeks prior to classes.....
DO NOT THROW AWAY – not a credit card!

- Direct Deposit
- Paper Check
- Disbursement on Declining Balance Debit Card

www.goldenbeardebitcard.com

Office of Student Accounts
Refunds

• Students have a CHOICE – but NEED to make one even if not expecting a refund at the time – you never know!
  • Log in with the 16 digits on the card / verify identity OR
  • Log in with the PIN issued in the card mailing / verify identity
  • www.goldenbeardebitcard.com

• THREE choices – can be changed anytime online!
  • Direct Deposit to checking or savings account (1-3 days)
  • Paper check mailed home (student must update this) (5-7 days)
  • Use the card as a declining balance debit card (same day)

• No CHOICE? Delays refunds…
• Sign up for text / email alerts on their site!

Office of Student Accounts
Refunds are issued to the student unless a parent plus loan is the direct cause of an overpayment. In those cases the refund goes to the parent who took the loan. Sometimes there is a refund to the student AND parent.

- Do you want the refund to go to the student regardless?
  - When completing the Parent Plus loan applications, parents indicate this, but if they forget, they can also…
  - Sign a release form on our website each semester.
  - [www.kutztown.edu/studentaccounts](http://www.kutztown.edu/studentaccounts) - refund link on the left

- Parent Plus Refunds are issued as paper checks only from our refund company and mailed to the parents loan address.

Office of Student Accounts
Bookstore Accounts

To help students whose accounts are in good standing, who are expecting a refund based on Pending Aid, be able to purchase textbooks in our bookstore, we offer Bookstore Accounts.

• **Apply through the Financial Aid office one week before school starts.**
  • Fall requests start August 17th
  • [www.kutztown.edu/studentaccounts](http://www.kutztown.edu/studentaccounts) - refund link on the left

• **Eligibility determined by:**
  • Aid status, potential overpayment, required items, good standing (no prior debts or holds), and granted permissions.

• **KU Bookstore only**

• **ONE account only per semester, per student**

• **Amounts range from $200 - $750 (expected refund will be reduced)**

• **If approved, takes up to 48 hours to use account in bookstore**
Parent Involvement

• Joint discussions
  • Don’t DO for the student, encourage them and help them
  • Have students log in and complete requirements
    • Terms & Conditions, Intent to Attend, Entrance Counseling and Master Promissory Notes, etc.
  • Explain loans, due dates, payments – costs involved
  • Empower THEM!
  • Students do better when they have a vested interest & understand!

We are sorry, and please don’t be mad with us… without the Consent to Disclose – we can’t tell you anything, even balance information
Contact Information - OSA

- **Email** – studentaccounts@kutztown.edu
- **Website** – [www.kutztown.edu/studentaccounts](http://www.kutztown.edu/studentaccounts)
- **Phone** – 610-683-4133
- **Fax** – 610-683-4674
- **225 Stratton Admin Bldg – 2nd floor**
- **PO Box 730, Kutztown, PA 19530**
- **15200 Kutztown Rd., Kutztown, PA 19530**