HOW TO: STUDENT FINANCIAL SERVICES

OVERVIEW

The MarywoodYou Portal opens the doors to plenty of useful financial services for students. These services include **viewing charges** and **your account statement**, **making payments**, **setting up eRefunds**, and **accessing your 1098T tax statement.** Since Marywood University will no longer be sending paper bills, you will need to use the Portal to access your statement and make payments.

This document will show how to navigate the Portal to complete the tasks above.

ACCESSING THE STUDENT PORTAL

1. Navigate to the Marywood homepage, or **www.marywood.edu**.

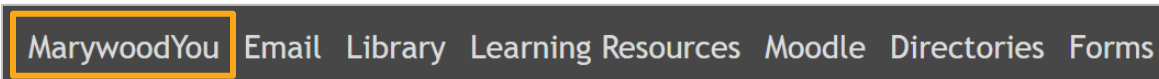2. In the gray bar at the bottom of the page, click **MarywoodYou**.

Figure 1: "MarywoodYou" on the Marywood Homepage

3. Log in with your student credentials.

   - These credentials are the same as you use for Moodle.

   - If you can't remember your information, contact the Registrar's Office.

Figure 2: MarywoodYou Sign In Page

4. Select **Student** from the left sidebar. This opens the Student Portal.
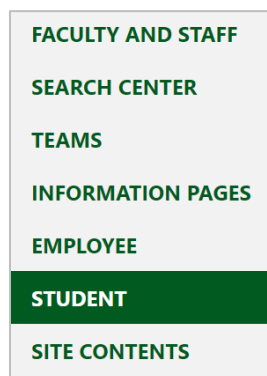

Figure 3: Link to Student Portal

5. In the left column under "Self-Service Menu," click **Students** to see link options.

Figure 4: Students Heading under Self-Service

STUDENT FINANCIAL SERVICES

Each of the services you will need to see charges, view your statement, make a payment, set up eRefunds, and access your 1098T can be accessed from the Student menu detailed above. As long as you can get to the **Students** menu under Self-Service, you can continue on to your account information.

For each of the services below, make sure you start at the **Students** menu. For more information, see the previous section.

SEEING YOUR CHARGES AND VIEWING YOUR STATEMENT

You can view your charges and statement using the Student Finance link in Colleague Self-Service. To get there, follow the steps below.

1. Click **Students** under the Self-Service Menu.

2. Click **Self Service** from the links listed. The Self-Service homepage opens in a new tab.
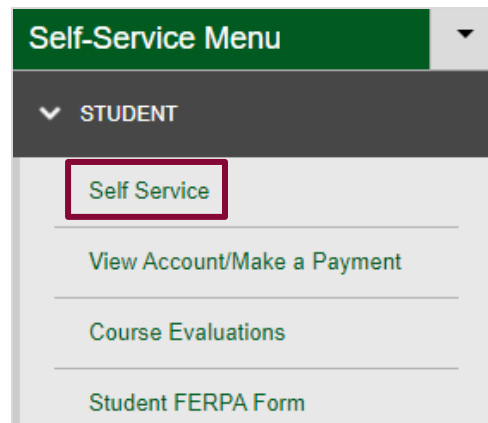

Figure 5: Self Service Link under Students Menu

3. On the page that opens, select **Student Finance.** Your Account Summary page opens.

Figure 6: Student Finance Link in Colleague Self-Service

4. On the **Account Summary** page, look for the **Account Activity** link near the **Total Account Balance** header. Depending on the size of your screen, it may be to the right of the header or at the bottom of the page.

Figure 7: Account Summary Page with Total Account Balance/Account Activity Highlighted

ACCOUNT ACTIVITY PAGE

The Account Activity page details your charges, payments, and financial aid by semester. You can also download and view your statement for each semester, which includes your courses for each semester.

Figure 8: Account Activity Page with Term Dropdown and Headers

The image above shows the Account Activity page in mobile view. In desktop view, the main components are the same, but more spread out.

The **Term** dropdown allows you to select the semester you want to view your charges, payments, and financial aid for. The current or upcoming semester should appear by default, but use the dropdown to select it, if necessary.
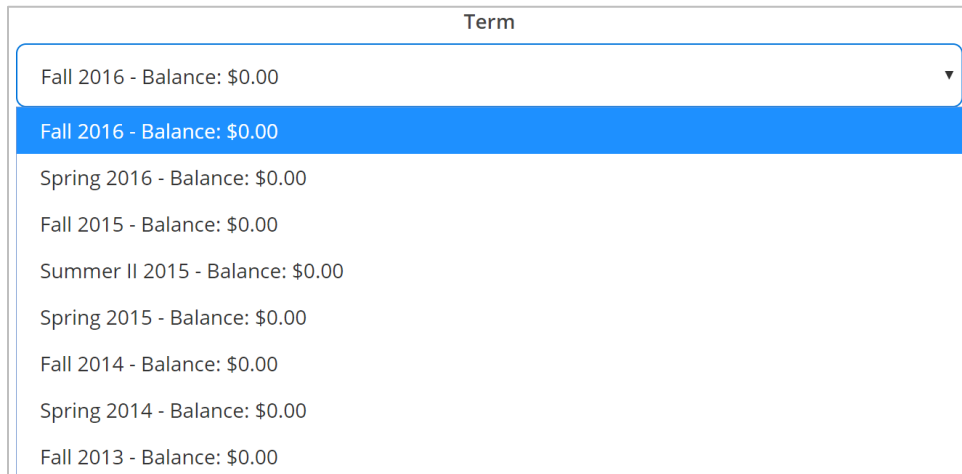

Figure 9: Term Dropdown with Fall 2016 Highlighted

VIEWING YOUR CHARGES, PAYMENTS, AND FINANCIAL AID AWARDS

When you change the term, the amount for **Charges**, **Payments**, and **Financial Aid** changes as well. Click on one of the headers (Charges, Payments, or Financial Aid) to see an itemized breakdown of each section.

- When you click on the **Charges** header, you will see **Tuition** and **Required Fees**. You may also click on these headers to see more information.

   o **Tuition** shows the courses you are taking in the selected semester that add up to the tuition total.

Figure 10: Tuition Header Expanded

   o **Required Fees** shows a description of the fees for which you are charged.

Required Fees	$50.00	˄
Description		Amount
Registration Fees-UG		$50.00

Figure 11: Required Fees Header Expanded

- When you click on the **Payments** header, you will see a record of any payments you have made towards your total so far. This section includes a **Receipt Number** that you can click on and print, the **Date** of payment, the **Amount** you paid, the **Pay Method**, and a **Reference Number** for the payment.

Payments				$50.00	˄
Click a receipt number to view a full copy of the payment receipt.					
Receipt Number	Date	Amount	Pay Method	Reference Number	
000110296	9/29/2016	$50.00	Check - Personal	CK #531	

Figure 12: Payments Header Expanded

- When you click on the **Financial Aid** header, you will see a breakdown and total of your financial aid awards. This section includes **Award**, how much was **Awarded**, the **Term**, how much was **Disbursed**, and more.

Financial Aid								$1,890.00	˄
Award	Awarded	Term	Disbursed	Anticipated	Other Terms	Loan Fee	Currently Ineligible	Comment	
Personnel Tuition Benefit - Academic Affairs	$1,890.00	Fall 2016	$1,890.00						
Total			$1,890.00	$0.00					

Figure 13: Financial Aid Header Expanded

VIEWING YOUR STATEMENT

You may view your entire statement by clicking the **View Statement** link near the top right of the page.
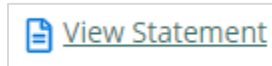
Figure 14: View Statement Link

When you click **View Statement,** the statement is immediately downloaded to your computer as "DisplayStatement.pdf" or something to that effect. The PDF displays your charges, payments, and financial aid, as you saw in the previous section. However, you can print this document for your records as Marywood is no longer sending paper statements.

Figure 15: Account Activity Summary As Seen on Statement

MAKING A PAYMENT

There are two ways you can make a payment through the Portal, and both can be found under **Student Account Information** in the **Student Portal.**

OPTION 1: VIEW ACCOUNT AND MAKE PAYMENTS

1. Click **Students** under the Self-Service Menu.

2. From the links that appear, click **Student Account Information.**

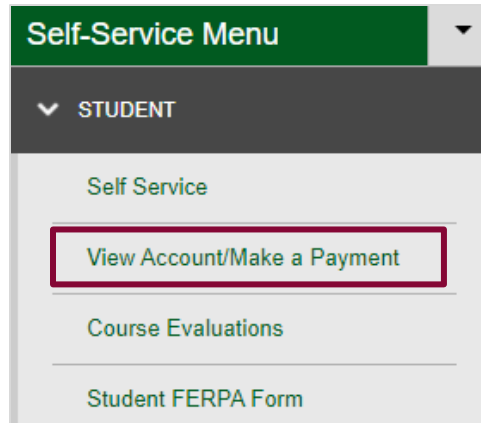3. Then, click **View Account/Make a Payment.** A new tab opens.

Figure 16: View Account/Make a Payment Link under Students Menu

4. Click **Continue to Payment Center** to access the TouchNet payment page.

OPTION 2: SELF SERVICE > STUDENT FINANCE

1. Click **Students** under the Self-Service Menu.

2. Click **Self Service** from the listed links. The Self-Service homepage opens in a new tab.
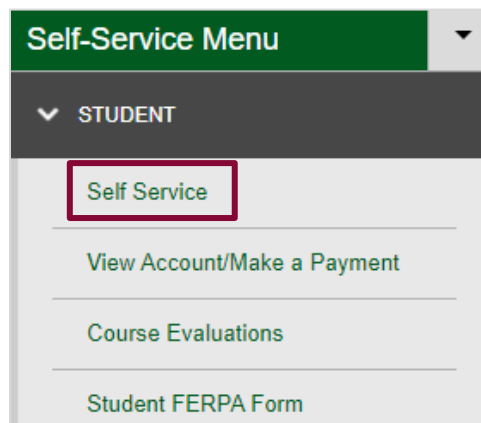

Figure 17: Self Service Link under Students Menu

3. On the page that opens, select **Student Finance.** Your Account Summary page opens.

4. Instead of the Account Activity link that you used in the previous section, click the **Make a Payment** link next to **Total Amount Due.** A new page opens.

5. Click **Continue to Payment Center** to access the TouchNet payment page.

THE TOUCHNET PAYMENT PAGE

The TouchNet payment page has information about eRefunds (covered in a previous document) and payment options available to you. It also includes a link to make a payment, which we will cover below.

1. Find the **Student Account** section in the center of the page. You will see your balance and buttons for View Activity and Make Payment.

   - The **View Activity** button only shows activity through TouchNet, so any payments you have made so far. This is **different** than the Account Activity page discussed earlier in the document.

Student Account	ID: xxx7067
Balance	$0.00

View Activity Make Payment

Figure 18: Student Account Section

2. Click **Make Payment** to begin the payment process.

3. Begin by setting your payment date.

4. Then, continue through the pages to provide your payment method and information. When you are finished, you will have the ability to print out a receipt.

| Amount | Method | Confirmation | Receipt |

Figure 19: Steps of Payment Process

SETTING UP EREFUNDS

You can set up eRefunds on the same page you accessed to make a payment. To access this page, follow either **Option 1: View Account and Make Payments** or **Option 2: Self Service > Student Finance** described above. Once you have reached the **Payment Center**, follow the instructions below.

1. In the right column of the Payment Center under **My Profile Setup**, click **Electronic Refunds**. The eRefunds page opens.

Electronic Refunds

Figure 20: Electronic Refunds Icon

1. There are two sections of the eRefunds page: **Refund Methods** and **eRefunds History for NAME.**

If you see "You must enroll in Two-Step Verification to add a Refund Method,"
*continue to the **Setting Up Two-Step Verification** section.*

If you see "A Direct Deposit account for refunds has not been set up,"
*skip to the **Setting Up Direct Deposit** section.*

SETTING UP TWO-STEP VERIFICATION

If you haven't set up Two-Step Verification for your account, you will be notified on the eRefunds page. Follow the steps below to set it up, starting from the eRefunds page.

If you have already set up Two-Step Verification, continue to the next section.

1. If prompted under **Refund Methods**, as seen below, click **Enroll in Two-Step Verification**.

Refund Methods

⚠ **No Two-Step Verification Profile.** You must enroll in Two-Step Verification to update a Refund Method
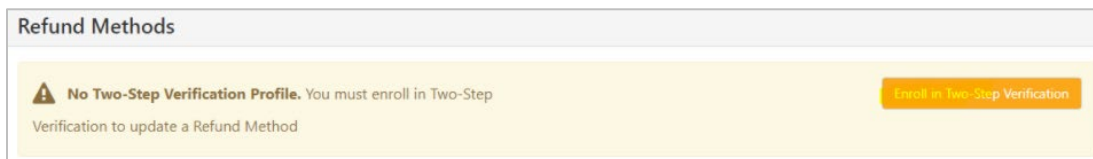
Enroll in Two-Step Verification

Figure 21: Refund Methods with Verification Message

2. On the **Security Settings** tab, select a Two-Step Verification method from the three provided. You may need to fill out additional information based on the method you choose. We recommend email.

Two-Step Verification Enrollment

Primary Method

Please select how you would like to receive a passcode.

○ Text message to existing or new mobile number
○ Email message to existing or new email address
○ Google Authenticator (Download Google's Authenticator app from the App Store (IOS) or GooglePlay (Android))

Figure 22: Two-Step Verification Enrollment Page

-   **Email message to existing or new email address:** select your Marywood email address, then click **Select** to choose your verification method.

Existing email addresses   rcovaleski@m.marywood.edu   ▾   Select

Figure 23: Email Address Selected for Verification Method

3. For a quick way back to the eRefunds page, click **My Profile** in the top right of the page. Then, click **Electronic Refunds.**
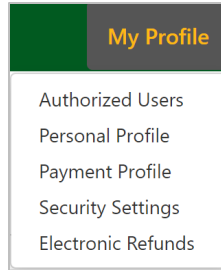
Figure 24: My Profile Menu with Electronic Refunds Link

SETTING UP DIRECT DEPOSIT

Once you have set up Two-Step Verification, you may continue setting up Direct Deposit for your eRefund. Follow the steps below to do so.

1. If prompted under **Refund Methods**, as seen below, click **Set up a new account** to set up your Direct Deposit. The **Set Up Refund Account** window opens.

Figure 25: Refund Methods with Direct Deposit Message

2. There are two sections: **Account Information** and **Billing Information**.

    - For **Account Information**, you will need your account type (checking or savings), routing number (click **Example** if you are unsure), and bank account number for the account you would like to deposit your eRefunds into.

    - For **Billing Information**, you will need the name on the account, the billing address, and a name for the payment method.

Figure 26: Set Up Refund Account Window

3. When you are finished, click **Continue** to confirm.

COMPLETING TWO-STEP VERIFICATION

1. On the eRefunds page, you may be asked to perform two-step verification in order to select a refund method or continue with your process. If so, click **Complete Two-Step Verification.**

Figure 27: Complete Two-Step Verification Button

2. You will then see a message about a passcode. Check your email for the code and paste it in the field. Then, click **Verify.**

Figure 28: Possible Verification Method after Setting Up Direct Deposit

3. If the code does not work, click **Resend Code.**

ACCESSING YOUR 1098T TAX STATEMENT

You can access your 1098T tax statement using the **Tax Information** link in Colleague Self-Service. To get there, follow the steps below.

Please note that you may have to give consent to receive your 1098 form electronically. You can do so on the Tax Information page.

1. Click **Student** under the Self-Service Menu.

2. Click **Self Service** from the listed links. The Self-Service homepage opens in a new tab.
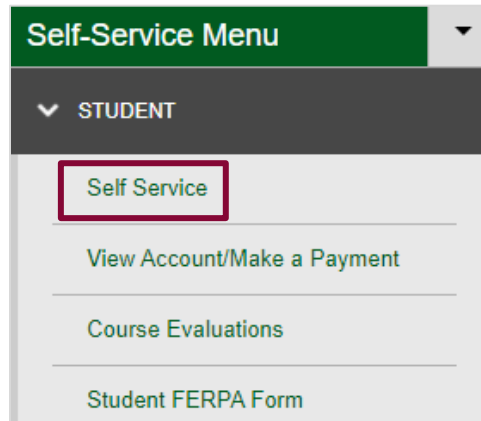

<p align="center">Figure 29: Self Service Link under Students Menu</p>

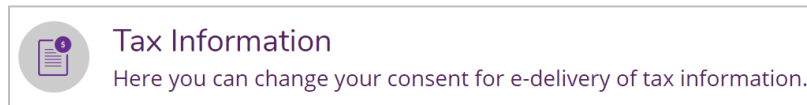3. On the page that opens, select **Tax Information.** Your tax information page opens.
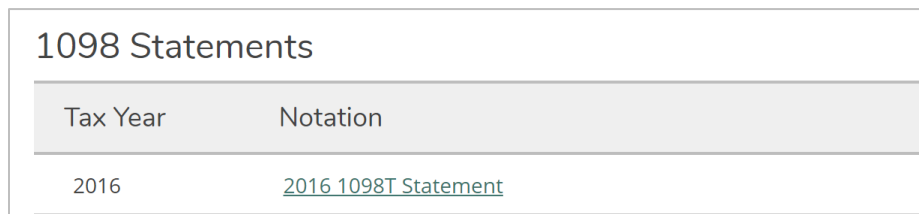

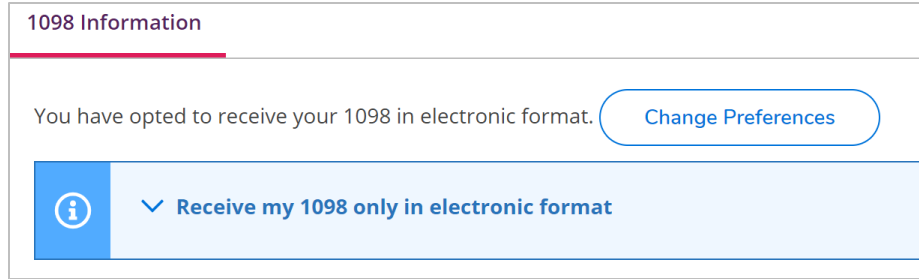<p align="center">Figure 30: Tax Information Link in Colleague Self-Service</p>

4. If you have given consent to receive your 1098 form electronically, you should see a listing of 1098 statements labeled by year.

<p align="center">Figure 31: 1098 Statements Section</p>

- If you are unsure if you consented to electronic delivery, you should see your consent status in blue at the top of the page, as seen below. Additionally, there is an **Electronic 1098 Consent History** section that provides the date of your consent, if given.

1098 Information

You have opted to receive your 1098 in electronic format. (**Change Preferences**)

ⓘ ∨ **Receive my 1098 only in electronic format**

Figure 32: Electronic Consent Status

5. To access your 1098 form, click the link to the right of the tax year you want it for. The form will then download to your computer in PDF format.

6. To print your form, click on the downloaded file and either click **File > Print** or hit **Ctrl+P** on your keyboard.