University Billing and U

Accounts Receivable Office
Accounts Receivable

• 0880 Beardshear Hall (ground floor)

• (515) 294-7388
• ubill@iastate.edu
• www.ubill.iastate.edu
Agenda

• U-Bill Basics
• Accessing the U-Bill
• Paying the U-Bill
• Student Refund
What is a U-Bill?

• U-Bill = University Bill

What will be charged to my U-Bill?

• Tuition & Fees
• Housing (if living on campus)
• Meal Plans
• Miscellaneous University Charges
• Books (optional)

Electronic Bill
Viewable in Workday on the 1st of each month

Due on the 20th of each month
Where is my U-Bill?

- In the upper left-hand corner, click on Menu, select Financial Hub from the options
Who can see my U-Bill?

- Only the student can see the U-Bill
- Additional access *may be granted* for a parent or third party by the student

**Friends and Family Access**

- Separate ID and password
- Used by parent or third party
- Student = Administrator
- View bill online
- Pay bill online
Friends and Family

Friends and Family will be set up during the onboarding process by the student. You must have at least one contact listed as the Emergency Contact.

Third Party Account Access
If you would like to allow someone else to make payments, view your financial aid, view your account activity, view your course fee statements, view your class schedules, and/or view your grades, make sure to follow these steps:

- Add or Edit a Friends and Family member entry for that person
- Select the Proxy Relationship Type
- Check the Is Third Party User checkbox
- In the Contact tab, add an email address (required)
- If your Third Party User is an employee at Iowa State University, adding their Work Email address will link their existing Workday account to their Third Party Proxy account. Use the "Work" email Type when adding the email address.

After you add the Contact, you will choose Manage Permissions for My Third Party.
From there, your student will decide what you will have access to on their account.
You will receive an email on how to access the website and another one with a temporary password.
Who can discuss my U-Bill?

Only the student, unless a Friends and Family Release is completed.

Friends and Family Release

Allows mom, dad, or other 3rd party to contact the Accounts Receivable Office to discuss the details of the student’s U-Bill.

Student = Account owner

3rd Party = Anyone other than the student owner
How can I pay?

**Online**
Pay with a checking or savings account in Workday

**Credit/Debit Card**
(2.85% interest charge)
An option on the payment screen
Will run through a system called NelNet

**Drop Box**
Located on the ground floor of Beardshear Hall
Pay with a personal check or certified funds

**Mail**
Send check or certified funds to:
**Iowa State Treasurer’s Office**
1220 Beardshear Hall
515 Morrill Road
Ames, IA 50011
Payment Tips

**Include necessary information**
Student’s name and university id number

**Include payment slip with payment**
Found at the bottom of the statement
Educational Savings Accounts

Educational Savings Account (ESA) & 529 Plan Payments are accepted

Contact your plan administrator

Do they require an invoice to release funds?

No Invoice Required
Work directly with plan administrator to have funds sent to Iowa State.

Yes, Invoice Required
1. Go to www.ubill.iastate.edu
2. Complete the ESA Request Form
3. Submit to the Accounts Receivable Office

Note: If the U-bill balance is not 100% covered by the ESA/529 Plan payment, it is the student’s responsibility to pay the remaining balance by the due date.
Are Payment Plans Available?

<table>
<thead>
<tr>
<th>PAY IN FULL</th>
<th>DEFERRED BILLING PLAN</th>
</tr>
</thead>
<tbody>
<tr>
<td>No additional fees</td>
<td>$20 fee per semester</td>
</tr>
<tr>
<td><strong>Due Dates:</strong></td>
<td></td>
</tr>
<tr>
<td>Fall – August 20\textsuperscript{th}</td>
<td></td>
</tr>
<tr>
<td>Spring – January 20\textsuperscript{th}</td>
<td></td>
</tr>
<tr>
<td>Summer – May 20\textsuperscript{th}</td>
<td></td>
</tr>
<tr>
<td>Note: You may have additional miscellaneous charges throughout the semester so it’s important to check your U-Bill every month</td>
<td>Pay the minimum balance for the first 3 months of each semester</td>
</tr>
</tbody>
</table>
Deferred Billing Plan

- $20 fee per semester
- Minimum payments for first 3 months of each semester
- Minimum payments shown on the U-Bill each month
- Sign-up necessary. You can elect to participate in the program after the first bill of the semester is produced

<table>
<thead>
<tr>
<th>Fall</th>
<th>Spring</th>
<th>Summer</th>
</tr>
</thead>
<tbody>
<tr>
<td>August 20^{th}</td>
<td>January 20^{th}</td>
<td>May 20^{th}</td>
</tr>
<tr>
<td>September 20^{th}</td>
<td>February 20^{th}</td>
<td>June 20^{th}</td>
</tr>
<tr>
<td>October 20th</td>
<td>March 20^{th}</td>
<td>July 20^{th}</td>
</tr>
</tbody>
</table>
Financial Aid & Your Bill

• Scholarships, grants and loans apply directly to the U-bill
• Students must authorize the release of their aid
• Students should review their Aid Status in Workday to ensure aid is clear to apply
• Aid begins applying to U-Bills the week before classes start
International Bank to Bank

- Convera Bank-to-Bank Transfer
- Initiated in Workday
- International currency of your choice (converted to US Dollars)
- Funds transmitted to Iowa State electronically
- Typically posted in 3-5 days after your bank initiates payment
Why do I need to set up Student Refund?

For A Timely Refund!

• Available Financial Aid is applied directly to charges on the U-Bill
  • 4-5 days before classes begin
• Any excess funds are refunded via Student Refund into checking or savings account of your choice
• Set up and monitor in Workday
U-Bill Reminders

• U-Bills are available the 1\textsuperscript{st} of every month
• Payments are due the 20\textsuperscript{th} of every month
• Discuss Friends and Family Access
• Check the U-Bill every month
We’re here to help!

**Summer**
Monday-Friday 7:30 AM – 4:00 PM

**School Year**
Monday-Friday 8:00 AM – 5:00 PM

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