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 (athletic tickets, parking fines)
- 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 and select Financials Hub from the options.

• The Financials Hub App is not currently available but will be July 26th

• Some students may have more apps listed depending on their access
Where is my U-Bill?

From here, you can view your U-Bill, enter information for refunds, make payments, and more.

View your U-Bill

- Enter your information for refunds
- Make payments
- Sign up for the deferred billing plan
- Print out the 1098-T tax form
View Statement

Student: Cy Clone
Student ID: XXXXXXXX
Academic Period: 2024 Spring Semester (01/16/2024-05/10/2024)
Academic Level: Undergraduate

Date Range: (01/16/2024-05/10/2024)
Anticipated Due: X.XX
Charges: X.XX
Applied Payments: X.XX
Anticipated Payments: 0.00
Refunds: 0.00

Institution: Iowa State University

Charges:
- Date: 12/14/2023, Charge: Health Fee
- Date: 12/14/2023, Charge: Activity and Service Fee
- Date: 12/14/2023, Charge: Health Facility Fee
- Date: 12/14/2023, Charge: Tuition Conversion - Undergraduate Nonresident Standard
- Date: 12/14/2023, Charge: Technology Fee - Standard
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 member 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
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
Online Payments

**ACH/eCheck**
No fee
Pay with a checking or savings account in Workday

**Credit/Debit Card**
2.85% convenience charge
An option on the payment screen
Manual Payments

Drop Box
Located on the ground floor of Beardshear Hall
Pay with a 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

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/forms
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.
Payment Options : Pay in Full

PAY IN FULL EACH SEMESTER

<table>
<thead>
<tr>
<th>No additional fees</th>
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<tr>
<td>Due Dates:</td>
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<tr>
<td>Fall – August 20th</td>
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<td>Spring – January 20th</td>
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<td>Summer – May 20th</td>
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Note: You may have additional miscellaneous charges throughout the semester so it’s important to check your U-Bill every month.
Payment Options: Deferred Billing Plan

- $20 fee per semester
- Splits the tuition and fees into three payments each semester
- **Sign-up necessary.** Student can elect to participate in the program after the first bill of the semester is produced on August 1st.

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<td>October 20th</td>
<td>March 20th</td>
<td>July 20th</td>
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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
Financial Aid & Your Bill

• Scholarships, grants and loans apply directly to the U-bill
• Students must authorize the release of their aid
  ▪ Is done through a Workday onboarding task
• Aid begins applying to U-Bills the week before classes start

*Financial Aid presentation following at 10 a.m.

Note: If the U-bill balance is not 100% covered by Financial Aid, it is the student’s responsibility to pay the remaining balance by the due date.
Why do I need to set up Student Refund?

For A Safe and 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 the checking or savings account of your choice

• Set up and monitor Student Refund in Workday
U-Bill Reminders

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

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

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

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