# Student Accounts Webinar Script

## Key Terms

On the next couple of slides we have listed a number of key terms that you may hear us say throughout the presentation and you may see come up on TritonLink.

## Slide 4: Student Accounts

The first topic we'll be going over during this presentation is your Student Account, what it is, and what you can find on it.

Your student account is a summary of all things related to UC San Diego billing.

- You can access your student account by logging into TritonLink, going to Financial Tools, clicking "Billing and Payment" and going to the "View and Pay Bill" page. Or you can simply click on the balance or the "account details" hyperlink found on the TritonLink landing page.

From the "View and Pay Bill" page, you will be taken to TritonPay, where you will have access to your electronic bill, view your account balance or credit balance, review holds, and find billing due dates for your balance.

It is important to note that while UC San Diego runs on a monthly billing cycle, tuition and registration fees are charged by default on a quarterly basis, which happens shortly after you enroll in your quarterly classes. There are several reasons why we run on a monthly cycle:  1) there is an option to enroll in a monthly payment plan for tuition and registration fees (we'll get into that later in the presentation), 2) if you will be living on-campus, a monthly payment plan option is offered for housing fees,  and 3) students can charge their students account with any purchases made at the bookstore, library, sunshine market, etc., which will be due during the next billing cycle

## Slide 5: TritonLink

As I mentioned in the previous slide, there are a couple different options to access your student account.

1) You can click on the account balance or account details hyperlink.
2) You can go up to "Financial Tools", click on "Billing and Payment", and then go to the "View and Pay Bill" page.

*If you have any holds, they will show up on the box right next to the "Account balance" box on the TritonLink landing page. This is where you would find all of your current holds, whereas if you look in TritonPay, you will only see financial holds that can be cleared by making a payment.

*Next to your holds, you will see the last box which will state whether you have the health insurance waiver or not. You must apply for the health insurance waiver and it must get approved for it to display on the student account.

## Slide 6: Authorizing Payers

While students are allowed to freely roam through their student account and contact our office, parents or any other party who may want access to your student account will need to become Authorized Payers to do so.

To add an authorized payer, the student will need to go to their TritonLink → Financial Tools → Billing and Payment → Add an Authorized Payer. They will then enter the authorized payer's first and last name and their email. An email with instructions on how to set up the parent portal account will be sent immediately to the email address. FYI, these emails may appear in the junk folder.

Once you are added as an authorized payer, you have access to the authorized payer portal where you can view and pay the student's bill, review student account activity, update payment profiles and contact information, enroll in the Triton Registration Installment Plan (which is the monthly plan for tuition), and load money into your student's Triton Cash accounts. Additionally, you will receive monthly electronic bill notices if there is activity on the account, and you are able to contact our office to ask specific student account questions.

## Slide 7: Authorized Payer Portal

This is the authorized payer portal where payers can login and view their student's bill.

Please note that this portal is different from the student portal. Authorized payers can only access the Parent Portal, while students can only access their student account on TritonLink.

## Slide 8: Reading Your Student Account

Up next, we will be showing you an in-depth look at TritonPay, where students can view and pay their bill, view their account history and billing statements, and access resource links.

The first area where I want to focus your attention is the Alert Call-Out Box. This will notify you of any outstanding balance, if you have a credit balance, or if you have any holds. On the far right side is the button you would click if you want to make a payment.

Next, you have the Account History link where you will be able to see an itemized breakdown of all of your transactions.

Lastly, you have an option to view up to a year's worth of past billing statements.
*If for whatever reason you need billing statements from before a year ago, you can request them through our office.

## Slide 9: Reading Your Billing Statement

This is your official billing statement- this becomes available to you every month that you have activity on your account. The activity can either be a payment or a charge- so don't be frightened if you receive an e-bill notice and you thought you had made a payment.

The top portion has the statement date, your PID, the due date, and the amount due.

The bottom will include a breakdown of all the charges and payments that have been assessed to your account since the release of the prior month's billing statement.

It is important to note that the billing statement is a static statement that is not updated after it is released. So, the amount due at the bottom will not include any payments, waivers, or financial aid that is posted to your account after it is released.

If you want an accurate reflection of what is currently due on your account, I recommend that you look at the Alert Call-Out Box balance on the My Account Summary page.

## Slide 10: Reading Your Account History

On the Account History page, you have several different viewing options. You can view your statement transactions which include all transactions on the billing statement, unpaid transactions which will show all charges that have not been paid for, or the current month transactions that will show the transactions that have been assessed to your account this month.

If you are enrolled in the monthly installment plan for tuition and registration fees, also known as TRIP, you will be able to view the next 2 installments-This will be shown as "Future TRIP installments" on the drop down menu. We will discuss this payment plan more later on in the webinar.

Finally, you can view your full account history, which will include all transactions posted to your account since you first began at UCSD. You also have the option to download your full account history.

## Slide 11: Reading Your Pending Awards

If you are a financial aid recipient, the aid may not appear in the billing statement right away. The pending awards are the different financial aid loans, grants, departmental fee payments, or TA fee remissions that you may be receiving for the quarter. Typically, because the awards aren't officially

disbursed into your account until it is closer to the due date or after the due date, the Pending Awards will automatically be taken into account to provide the Adjusted Balance. If the amount is positive, you must pay that balance by the due date.  If the amount is negative, that signifies that the financial aid has paid the entire balance due, and the student will be eligible for a refund for the displayed amount.

While pending aid does display on your student account, we cannot advise on specific aid amounts or aid changes. We ask that you direct these questions to the Financial Aid and Scholarships Office directly.

## Slide 12 & 13: How to Make an E-Check or Credit Card Payment

If you would like to make an e-check or credit card payment, once you select the "Payment Options" button, select the first option that reads: e-check or credit card, to be taken to the Custom Payments page. Please note there is an additional 50 cent service fee for e-check payments, and an additional 2.75% service fee for credit card payments.

The Custom Payments page presents a number of different payment options. You can choose to select your total account balance, you can pay a percentage of your balance, you can pay a specific amount, or by clicking the "Pay Selected Charge" button you can select which specific charge you want to pay for. For example, if you only wanted to pay for tuition and registration fees and not your housing fees, you can do that or vice versa.

## Slide 14 & 15: How to Make an International Payment

If you would like to make an international payment or wire transfer using our international payment partners, which are either Western Union or Flywire, you will select the select the second option that reads: by international wire.

The Payment Confirmation page you are taken to will allow you to make a selection on the two different international payment options. Once you select either Flywire or Western Union, you will be given additional information on each payment method. You can then click on the "Continue" button that will redirect you to either the Western Union or Flywire sites.

*Please note that when you select the international payment option, the next screen that you are taken to is the Payment Confirmation page and not the Custom Payment page. This occurs because these international payments must be completed on either the Western Union or Flywire sites. As a result, you are unable to make a "Selected Charge" payment. However, you are still able to choose the amount that you would like to pay. The only thing you wouldn't be able to do is designate what charges the money is directed towards.

## Slide 16: Flywire

Selecting the Flywire option will redirect you to the Flywire website where you can enter the country or region you want to make a payment from, the amount you want to pay, as well as several other steps to complete the payment.

Depending on the location and payment method you select, it can take 10-12 business days for the payment to post to your student account. With that being said, if you do plan on making an international payment, you should do so with knowledge that it may take up to 12 business days to post. The University does not accept the date of initiating the payment as the date of payment

## Slide 17: How to Make a Western Union Payment

When you select the Western Union option, you will be redirected to the Western Union website, where you can enter the country or region you want to make the payment from, the payment method, and the rest of the information required to successfully make a payment.

As with the Flywire option, this international payment method can also take up to 12 business days to post to your student account from the date you originally submit the payment online.

## Slide 18: Tuition and Housing Financial Scams

In recent years, there has been an increase in online scams that target college students by promising a reduction in tuition and registration fees if a 3rd party service is used to pay their fees. International students have been targeted more frequently, and scammers have especially targeted students using the popular app, WeChat.

You should also beware of housing scams, particularly on websites like Craigslist. Certain examples of scams are the following: advertised pricing is much lower than other similar properties, the person trying to rent you the property claims to be an agent for the property owner who is too busy, out of the country, etc., the owner or renter requires you to sign the lease before you see the rental property, or you are asked to wire the deposit money before you have seen the rental property.

What can you do to protect yourself from these scams?

Never share your online credentials or financial information with anyone, always use official UCSD payment methods, and do not respond to 3rd party solicitations tuition fee payments. UCSD does not offer any discounts for tuition or housing fees.

If you are an international student who has been targeted, notify the International Student and Programs Office and they will identify helpful resources for you.

## Slide 19 & 20: Central Cashier's Office

If you are unable to make a payment using any of the methods described previously, you can make a payment directly to the Cashier's Office, either by visiting the office in-person or mailing in a check. Please note that you can only use the payment options listed on the presentation- so, cash, which is made in-person only, personal checks, money orders, cashier's checks, or travelers checks.

Checks should always be made payable to UC Regents and include your PID.

If you will be mailing in a payment, the mailing address is: UCSD Cashier's Office 9500 Gilman Dr Mailcode #0009.  It is very important that you include the mail code, as it specifies the exact department location in which to send the check to.

Please note that due to COVID-19, the Cashier's Office location is closed until further notice. However, you can drop off your payment using the Payment Drop Off Box located on the south side of the Cashier's Office.

Lastly, UCSD does not accept overpayments; you can only pay for the current charges on your account.

## Slide 21: College Savings Funds

529 Payments or College Savings Funds are prepaid educational savings plans that are set aside for future college costs. The Cashier's Office processes these payments, and in order to successfully make a payment using these funds you will need to provide your 529 administrator a billing statement showing your account balance and then provide them the Cashier Office's mailing address, as they will need to mail in a check payment. UCSD does not accept wire transfers from 529 plans.

The payment must include your name and PID.

*UCSD also does not accept overpayments, so the 529 plan administrator cannot mail in a check for the full year. They must send payments each quarter.

## Slide 22: VA/3rd Party

Third party sponsored students are those who receive tuition and fee payments from an outside organization. A different office may facilitate third party billing depending on the sponsor.

There are three third party groups:

1) For students sponsored by domestic organizations, for example, other U.S. Universities
    a. Our office (Student Financial Solutions) manages the billing and collection of the fees for these students
2) For International students sponsored by non-U.S. agencies
    a. These accounts are managed by the International Students & Programs Office
3) For Students receiving Veteran's Affairs benefits
    a. These accounts are managed by the VA Coordinator at the Registrar's Office

## Slide 23: Scholarships

If you will be receiving any scholarships from outside agencies, meaning it is not part of your financial aid package, the scholarship agency must sent the check directly to our office (SFS).

Once we receive the scholarship, our office will process it, which will then generate an email to your UCSD email address that will let you know we have received and processed your scholarship check. From that point, we send a report to the Financial Aid and Scholarships office that lets them know that you have a scholarship that they can post to your student account.

The entire process from the time we receive the check to when it is posted to your account typically takes 5-7 business days during peak times, which is usually at the beginning of each quarter. If we are not receiving a high volume of checks at the time, it can take 2-3 business days.

## Slide 24: Campus Cards

Student Financial Solutions also encompasses the Campus Cards Office, which is responsible for issuing student ID cards. If you will be living on-campus, the ID card will be pre-loaded with dining dollars which you can use at the various college dining halls and markets. Additionally, you have the option to load TritonCash into the card. Authorized payers can also load TritonCash money onto the card via the Authorized Payer Portal). TritonCash can be used at Price Center and a number of approved restaurants and markets outside campus. You can also use your student ID card to pay for items at the Bookstore, Sunshine Market, and campus printers, and the charges will be assessed to your student account. You can them pay them off via TritonLink once the charge is available for viewing in the billing statement.

It is important to note that the purchases you make with your student ID card, whether it be a laptop or a book, will be due on the next billing cycle. For example, if you purchase something on September 15th, it will be due on the October billing due date.

## Slide 25 & 26: TRIP

Next up, we will be going over the Triton Registration Installment Plan which is the monthly payment plan we have for tuition and registration fees. TRIP will allow you to pay for your tuition and registration fees in 3 monthly installments instead of having to pay the lump sum at the beginning of each quarter. There is no interest associated with enrolling in TRIP- a one-time $40 fee will be charged each quarter you utilize this option, and will be due with the payment of your first monthly installment.

This means you will not need to make the full tuition payment by the quarterly due date. This is a great option for students not receiving enough financial aid to cover all of their tuition and registration fees. It is also a great option for those who simply want to split up their payments.

There may be a couple reasons you are unable to enroll in TRIP. You may have enough financial aid to cover all of your tuition and registration fees, or you have a hold on your account. Please note that being enrolled in a monthly housing installment plan will not impact your eligibility to enroll in TRIP.

TRIP is only available for fall, winter, and spring quarters- you cannot enroll during summer session. You can enroll via TritonLink or the Authorized Payer Portal. Typically, you can enroll in TRIP about a month before the first due date of the quarter. For each quarter's specific date, please refer to the TRIP page on our website.

TRIP covers only tuition, non-residential tuition, registration fees, and student health insurance. So, basically it will combine all of those fees and divide them into three monthly installments. For example, for Fall 2020 if you enroll in TRIP, you will pay for one-third of your tuition and registration fees on the September billing due date, the second third in October, and the last third on the November due date.

TRIP does not cover housing or other miscellaneous fees. However, if you wanted to pay your housing fees on a monthly basis as well, given that you live on campus, you can change your housing plan via the Housing portal.


## Slide 27, 28, 29: Refunds


UCSD issues refunds to students who have made a cash/check overpayment, receive excess financial aid, make a credit card overpayment, receive a housing credit, or receive stipends.

Refunds must be requested from our office via the Services & Support portal. These refunds are issued under the student's name, regardless of who made the payment.

Slide 28- To find out if you have a refund available on your account, you will need to go to TritonLink and then TritonPay. From the My Account Summary page on TritonPay the alert banner will state that there is a credit balance available.

If there is a credit balance available, you can contact or visit our office to initiate the refund. Please note that financial aid refunds are typically disbursed automatically within 2-3 business days of the credit appearing on your account. Any available credit that is not used to pay for charges will be refunded automatically 90 days following the date of payment.

Once the credit is refunded (meaning you no longer have that credit on the account), it will appear on the Account History page under the "charge" column as a "Fin Aid Rfn," a Cash/Check, Stipend, or Housing transaction.   The reason why the transaction will display under the "charge" column is because when a refund is initiated, the negative credit balance has to be offset by a positive charge.

You can receive your refund in a variety of ways:

> The recommended option is Direct deposit transfer to a bank account. This will only occur if you enroll in direct deposit via TritonLink. This will require that you either have a US checking or savings account.

If a student does not enroll in direct deposit, a paper check will be mailed to your current mailing address, which is usually where the student resides while attending the university

If there is no active current mailing address, it will be sent to the Permanent Mailing address, which is usually the family's address

When a graduate student is awarded monthly stipends and is not enrolled in direct deposit, checks will be sent to the student's Graduate department.

If the refund originates from a credit card transaction, the refund will be sent back to that same credit card.

Please note that parents cannot request refunds on behalf of students.

## Slide 30: Billing Due Dates

As mentioned at the beginning of the presentation, UCSD runs on a monthly billing cycle. So, while you are by default charged tuition and registration fees on a quarterly basis, there are other purchases or charges you may incur that are due on a monthly billing cycle.

For Fall quarter, which is comprised of September, October, and November, each month has a different billing due date. The September billing due date is when your tuition and registration fees (as well as housing if you live on-campus) will be due. If you are paying your full tuition and registration fees as well as housing for the quarter in September, you do not have to worry about the October or November billing due dates, unless you charge something to your account during the middle of the quarter.

Also, worth mentioning, if you have outside health insurance (for example, if you are on your parent's plan), you can apply to waive USHIP, which is UCSD's health insurance plan. You can apply via TritonLink by going to the Financial Tools tab and then clicking the "Health Insurance Waiver" option.

## Slide 31: Contact Us

If you have specific questions regarding your student account, do not hesitate to contact our team by either submitting a ticket using the UC San Diego Services & Support portal or sending an email to sfs@ucsd.edu.

You can also find various knowledge base articles via the UC San Diego Services & Support portal whether you are a student, parent, or UCSD community member.