

Online eBill and ePayment for Student Accounts

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Abstract

Wake Forest University (WFU) has developed the Deacon Electronic Account Center (DEAC) to offer an online system for paying tuition and other charges, checking monthly statements listing student account detail, and viewing regularly updated student account activity. This new e-bill and e-payment system gives students and parents the ability to view up-to-date account information as well as details of transactions expected to occur in the upcoming semesters including anticipated tuition and housing charges and financial aid awards, neither of which were available before. Users can provide information that will enable electronic transfers from checking and savings accounts to the University. In addition, students can pay using their campus debit card. Data from DEAC is fed electronically into the University's accounts receivable system. The system changed the Student Financial Services staff into a more efficient and customer service oriented group.

An Introduction to Wake Forest University

Wake Forest University (WFU) is a private, liberal arts university located in Winston-Salem, NC. Celebrating its 170th year, the University consists of two undergraduate schools (Wake Forest College and the Wayne Calloway School of Business and Accountancy) and five graduate schools (the Graduate School, Law, Management, Divinity and Medicine). WFU has 4,037 undergraduates and an overall total of 6,444 students. The University is renowned for its Georgian architecture and immaculately landscaped campus as well as being named by Yahoo! as one of the most wired schools in the nation.

Financial and Accounting Services provides accounting services for all the schools of the University (with the exception of the independently operated medical school), off campus rental units and real estate, the Graylyn International Conference Center and the Reynolda House Museum of American Art. The office numbers approximately thirty (30) staff members. This division of the University consists of general accounting and reporting, accounts payable, accounts receivable (Student Financial Services), endowment accounting, budgeting and planning, payroll, and financial systems administration. The University Controller leads the division.

Statement of the Problem / Initiative

While WFU prides itself in being a higher education leader, the accounts receivable function, including both procedures and systems, was anything but. A glimpse into the prior billing environment was slow, paper and labor intensive, and time consuming. The Accounts Receivable function was not flexible and made it cumbersome on staff members to provide accurate and timely data and therefore made it difficult to provide the best possible customer service. Limitations and issues facing the old billing environment include:

- *Limited System Functionality:* WFU's legacy ERP system had a number of limitations relating to student billing. With the growing number of divorced parents, it was all but impossible to present a statement to both parents living at separate addresses. The University eventually had to programmatically change the legacy system to allow statements to go to multiple people. In addition, processing the bills took an inordinate amount of time and effort. The system was inflexible in printing both customized messages based on the student and his/her balance and zero balance bills with transactions. Because of these issues, some billing cycles Student Financial Services would have to process up to thirty (30) billing runs. This would take up to five (5) days. The effort used valuable staff time that prevented WFU from focusing on customer service and support.
- *Lack of Customer Visibility:* Prior to DEAC being implemented students would receive a billing statement approximately six times per year. This paper statement was mailed to the student's home address. Out of the six statements each year, only two of them contained information giving students and parents visibility into future semesters' charges

and financial aid. Even though these two statements gave our customers visibility into the future it was unfortunately not fluid. Changes in anticipated charges and financial aid could not be easily or routinely communicated. A sample old bill is contained in Appendix A.

- *Limited Payment Options:* Payment options were limited to mailing in a paper check. Students did not have the ability to pay with their campus debit card unless they came to the cashier's window to pay with it.
- *Undesired Financial Implications:* Beyond system limitations creating time and effort constraints, financial implications also resulted from the old billing structure. One of the largest obstacles to Student Financial Services ability to timely collect tuition receivables was the bi-monthly billing timeline. Because students and parents were not presented with a bill as often, they did not pay as often. This limited billing schedule also resulted in an untimely reporting of receivable transactions to students and parents sometimes as much as 60 days after the transaction occurred.

Around the year 2000, the University's Board of Trustees laid out a strategic long-range plan for the University. This plan stated, along with scores of other items, that the administrative departments improve customer service and streamline the interaction with parents and students. The plan desired that a student's financial information be available online along with the opportunity to pay electronically.

Design and Implementation

Beginning in November 2002, Financial & Accounting Services formed an internal team of three members (the Financial Systems Administrator, Accounts Receivable Manager and the Student Financial Services Manager) to conduct an intensive search for available suppliers and their solutions in the e-bill and e-payment space. This team talked to and visited numerous peer universities among other research. In doing so, the team put together an extensive list of questions to rate the potential suppliers. This list of questions can be found in Appendix B. The team looked at solutions from ACS/Infinet (QuikPay), Sallie Mae (NetPay), Informed Decisions (CASHNet SmartPay) and TouchNet.

The team early on made the decision to go with an application service provider (ASP) environment to allow for a lower total cost of ownership experience. The ASP environment also allows easier upgrades for WFU. The University also knew since it was an early adopter of electronic payment systems, in general, that it could still provide a leadership role in designing and developing technologies that other schools could utilize.

In June 2003, WFU contracted with Affiliated Computer Services, Inc., (ACS) and Infinet, Inc., to produce an online bill presentment and payment system that would be accessible to all of our constituents – students, parents and other third party payers. In addition to the producing the system, the University, in conjunction with ACS, contracted with Financial Statement Services, Inc, (FSSI) to handle paper bill fulfillment services. The product provided by Infinet is branded as QuikPay; WFU rebranded it internally as DEAC. Our stated goal was not cost savings but rather to improve information access and customer service. As you will soon read, we did – tremendously.

WFU put together a cross functional team consisting of team members from Financial & Accounting Services (of which Student Financial Services is part) and Information Systems. Financial & Accounting Services provided project management service. There was one part time programmer dedicated to this effort. In addition to this, ACS, Infinet and FSSI all had project teams working on their various parts of the implementation.

The implementation started in early September 2003 and concluded in late November 2003. WFU made no changes to the underlying accounting system but worked to rebuild the billing system output that would feed the new DEAC system. This included bridging data from multiple modules of the legacy ERP system and external data feeds that the legacy ERP could not handle. The ACS and Infinet teams enabled the ASP environment and worked with FSSI to handle paper bill fulfillment.

The reengineering of the billing system output took approximately two (2) months to complete. Infinet provided a set of specifications that the output files needed to match. This process required an extensive review of the data elements and their meaning in the legacy accounts receivable system. Once this took place, the process of defining the pieces of the bill took place. Parents and students were surveyed as to what they wanted to see.

While ACS and Infinet deliver a base e-bill and e-payment system, WFU desired a number of customizations, taking the system to the next level. ACS and Infinet built these customizations into their base product to continue to allow for seamless upgrades and data flows. This included the ability for our students to pay with the Deacon OneCard, WFU's campus debit card.

Benefits of the DEAC System

With the advent of DEAC online e-billing and e-payments were achieved along with the streamlining of tasks performed by Accounts Receivable staff. DEAC gives WFU the ability to present both monthly bills and a daily account summary to students and parents.

There were a number of efficiencies and features gained with the new DEAC system:

- *Process Improvements:* WFU designed and built two new billing outputs from our legacy billing system to feed the DEAC system. The first was to send monthly statement and billing data. Programs and processes were streamlined to take the process from up to thirty (30) billing runs to one (1) and from up to five (5) days to at most one (1) day. DEAC presents the data on-line the same night that it is sent. Paper bills are generated from the file within the next few days and are mailed to those students who have requested a paper bill. The nightly current activity that is sent to DEAC is completely automated and requires no human interaction. A chart of data flows can be found in Appendix C.
- *Information Access:* Students and parents now have an enhanced bill available to them. They can choose between an HTML bill or a PDF bill that looks just like the paper bill. The statement contains both current, actual transaction activity on their student accounts as well as future anticipated activity. An email is sent to notify students when a bill has been posted to their accounts. These billing statements are available online for twelve (12) months. In addition to the monthly billing statements, DEAC receives a nightly load of up-to-date current and anticipated activity. This different screen gives our customers more information than was ever available in the past and gives them the necessary

visibility, on an updated daily basis, that allows them to understand their student accounts better and make more informed financial decisions. A sample DEAC monthly billing statement is found in Appendix D.

- *Single Sign-on:* WFU has been a leader in academic technologies for close to a decade now. A part of this is our campus intranet. Students, who automatically have access to the intranet and use it extensively for other campus services such as registration, were given single sign-on access to DEAC.
- *Ease of Use System:* Most technology savvy college students and their parents are already using online credit card and banking systems. The DEAC user interface contains many of the same features and functions of these system. Most importantly it mimics their ease of use.
- *More Payment Options:* Payment options were expanded to include Automated Clearing House (ACH) transactions and debits from student's campus cards. Students and parents were given the ability to create ACH payment profiles that debits either their checking or savings account and stores them in the DEAC system for quick and efficient future bill payments. WFU's Student Financial Services staff also has the ability to draft a student or parent's account through the system as well. The students' favorite payment option for their portion of the bill, though, is an online debit to their campus card – the Deacon OneCard.
- *FERPA Compliance:* FERPA is one of the privacy laws that affects higher education the most. With DEAC, students have the ability to grant access to parents (one or both) and other parties of their choosing without having to involve Student Financial Services.

These third party payers can see the student's bill and current activity. Students can set up user logins and passwords. In addition to allowing authorized payers to view their account activity, students can instruct other third party payers known as guest payers, such as employers, on how to pay on their behalf, through DEAC, without giving them access to any information. Both the authorized and guest payers log into DEAC through the Student Financial Services' web site.

- *Billing Flexibility:* Since the DEAC system includes both bill presentment and payment, WFU is now able to provide bills to more than one person without having to make major programming changes and without having to print more than one bill. In addition to online presentment, DEAC also provides opt-out functionality for receiving paper bills. If a student or parent desires not to receive a paper bill, he/she can check a box and they will not be sent a bill. As more and more customers choose this option, the University will experience cost savings over the current environment.
- *Improved Financial Conditions:* By standardizing billing timelines, DEAC has enabled WFU to collect tuition receivables quicker. Bills are prepared and sent monthly, increasing the number of times that students and parents see the bills and ultimately resulting in an increased number of payments. In addition to a standard monthly bill run, WFU is able to present very timely transaction information to our students through the daily account summary. This file is updated nightly presenting parents and students account activity that is up to date within twenty-four (24) hours. The University has witnessed an 8% increase in year over year cash flow since DEAC went live.

- *Improved Financial Controls:* With an application like DEAC, the back end of the system provides enhanced reporting normally not available with an ERP solution. WFU can run reports on payments made and monies sent to the bank, both of which can help in account reconciliations. Internal controls are improved with better reporting and querying capabilities, but DEAC also attaches an audit trail to each transaction as well as providing differing levels of security. Users can be defined as a customer service representative that allows users to view and make payments against an account, as a reporter that allows for system reporting and querying or as an administrator that allows for system setup. Users are setup with only the necessary functions needed to perform their duties. The final improved internal control is that WFU is simply not handling the amount of money in-house anymore. Since this function is outsourced the risk to WFU has been reduced.

Retrospect

Looking back over the DEAC project, now nine (9) months after going live, brings to light several items that would have been helpful to plan for and think about earlier on in the process:

- *Better Coordination of Legal Documentation:* While no software contract is straightforward or easy to negotiate, this contract was made more complicated by the relationship between ACS and Infinet. In addition, this project aimed at improving access to data online. The legal team at WFU took extra care to ensure that the data was going to be protected both in transfer and storage at the third party, namely Infinet. With so many complexities it would have been beneficial to build in more time for the University's legal department to analyze and negotiate the contract so as not to impact the kickoff of the implementation phase of the project.
- *Improved Technical Documentation:* The technical documentation that was produced during the early weeks of the project was insufficient. Because of this some later testing was impacted with unknown features. It is imperative to build meaningful functional and technical documentation from the beginning of the project.
- *Better Execution of Marketing Plan:* Like any end user product or service DEAC needed to have a timely and comprehensive marketing plan. The team delivered a multi-pronged introduction to the campus community that excited a lot of customers; however, the introduction marketing blitz needs to be continued over time. The success of an online application is often measured by its adoption rate. While the DEAC system has

experienced a steady increase in users a prolonged marketing plan might have helped gain faster adoption around campus.

Appendix A: Sample Old Bill

Spring 2004 Semester Charges

Account Number: 99270512	Division: STAR / ABBO	Due Date:	
	School: Undergraduate	December 15, 2003	
<hr/>			
Previous Balance	\$ 270.00	Payment Methods:	
Deposits Received	\$ _____	Check	\$ _____
Current Charges: Tuition	\$ 13,245.00	FACTS (1)	\$ _____
Housing Charge	\$ _____		
Deacon OneCard	\$ _____		
Parking Registration	\$ _____		
	\$ _____		
Music Fee	\$ _____		
Financial Aid as of 11/04/2003	\$ -11,103.00		
NET AMOUNT DUE	\$ _____		

*Please return this portion in the enclosed envelope.

(1) Please visit www.wfu.edu/sfs for registration.

FINANCIAL AID AWARD	AMOUNT
CFI Fed Sub Stafford Loan	2,750.00
Federal Perkins Loan	2,000.00
WF CitiAssist Loan	303.00
Wake Forest College Sch	6,050.00

TOTAL FINANCIAL AID	11,103.00

Please note that final determination of the financial aid awards listed is subject to the students eligibility for the awards for the semester indicated above.

Send Payments To:
 Wake Forest University
 PO Box 751425
 Charlotte, NC 28275-1425

Telephone: (336) 758-5234
 Fax: (336) 758-4004
 Email: FAS-AR@wfu.edu
 Web: <http://www.wfu.edu/sfs>

To The Responsible Party of

Appendix B: Requirements Gathering Questionnaire

Corporate Information & History:

1. How many universities and colleges do you currently have in operation and/or implementation?
2. Provide your client listing.
3. Describe the background of your company.
4. How long has your firm been in the higher ed market?
5. What is your average transaction volume per school?
6. What is your average transaction dollars per school?
7. Provide your pricing schedule and information.
8. Who are your competitors?

Technical Infrastructure:

1. Describe your ASP environment and facilities.
2. What browsers is your product compatible with (Netscape or IE or both)?
3. Describe the format in which data (e.g. billing data, student information) will be provided to you.
4. How does WFU receive data back from your firm? Describe the data's format.
5. How often can data be sent and retrieved from your firm?
6. How quickly is sent data displayed online?
7. Describe your firm's technical support. Specifically, what are the hours of operation, is it team-based or does WFU have a dedicated person, is it telephone or web based support, etc.
8. Can your product work in conjunction with an intranet. Specifically, can it accept the passing of logins and passwords from an intranet (i.e. to create a single sign-on environment)?
9. Provide a copy of your service level agreement. Specifically describe timing and amount of backups, whether or not the product is in production 24 hours a day, 365 days a year and how quickly help rendering service will be delivered?
10. Can your product automate uploads and downloads (i.e. is there a scheduling capability)?
11. Describe how the software is licensed (i.e. is it concurrent user licenses or a site license for unlimited usage)?
12. Are there timeouts on user sessions? If so, are they user defined?
13. Describe the implementation process. Specifically address the typical length of the entire process, whether or not the product can be put into production in phases (e.g. presentment, billing, etc.) and what the team member makeup should be.

Online Functional Specifications:

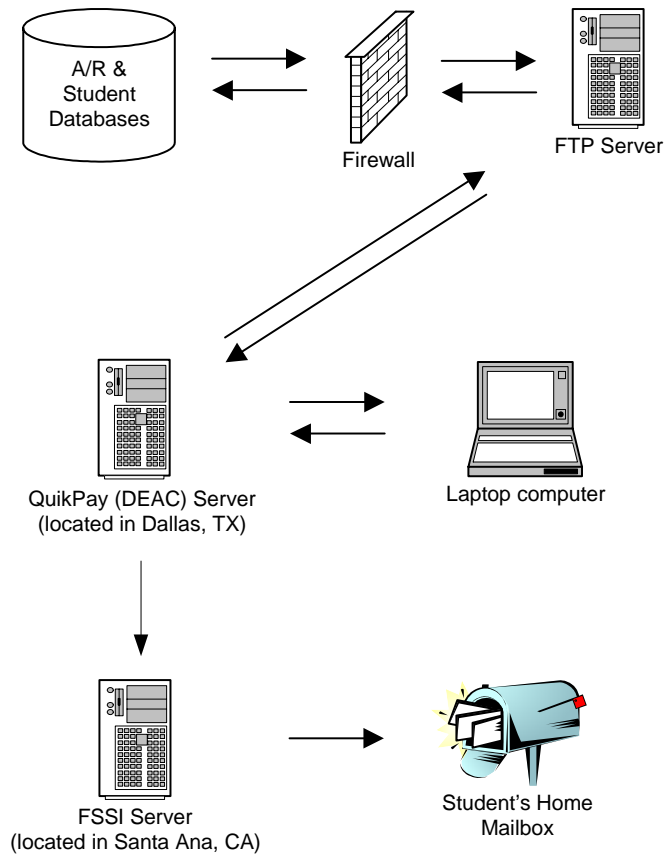
1. Provide a demo of how the software works.
2. Does your product provide proxy access? If so, how does it work? How many proxies can a user have?
3. How do users and/or proxies access the system. Can students enter through an intranet whereas proxies come directly to your web site?

4. What other types of payments does your software provide for (e.g. admissions, development, etc.)?
5. Can your solution handle convenience fees?
6. Describe all of the payment mediums available in your system (e.g. checks, ACH, credit cards).
7. Describe online printing capabilities.
8. How much history does your system allow to be stored and accessed?
9. Describe the bill presentment. Is there a single standard design, multiple template options or is a completely customized bill available?
10. Describe your system's capabilities to present pre-bills. Can the system handle them? Provide examples of how your other customers handle these.
11. Do users have the ability to pick and choose which charges to pay while leaving at least one charge unpaid?
12. Is the system flexible enough to allow users to add payments to a selection of predefined charges? Can they add multiple payments?
13. Does the system allow an interface with a school's debit card system (i.e. the system that most meal plans, vending and other campus services are paid with).
14. Describe the system's email capabilities, if any.
15. Can the system handle user defined fields (e.g. displaying hold on an account)?
16. How does your system handle refunds?
17. When does WFU get paid? Do payments go directly into the WFU account or is there a lag?
18. When dealing with credit cards, who's fees are charged? Yours or WFU's?
19. Describe your functional support and knowledge for banking and credit card regulations. Furthermore, is this support and knowledge base a team or a dedicated person?
20. Describe online reporting capabilities. Are they all canned or are there some ad hoc reports?
21. Provide a listing of system reports.
22. Can your system handle data with different due dates?

Offline Functional Specifications:

1. Does your firm offer the ability to print and mail paper bills?
2. Describe the template for the paper bills. Is there any ability to customize them?
3. Provide samples of bill design.
4. Provide your pricing schedule and information.

Appendix C: How Data Flows in DEAC



Appendix D: Sample New Bill



Wake Forest University Student Account Statement Account Activity

Student ID#: 99270512
Student Name:

Statement Date: 03/31/2004
Due Upon Receipt

Date	Term	Description	Charges	Credits (CR)	Total Due
03/01/2004		Previous Balance	335.70	0.00	335.70
03/01/2004	Spring 04	Park/Veh Violation 02/26/2004	20.00	0.00	355.70
03/24/2004	Spring 04	Park/Veh Violation 03/23/2004	20.00	0.00	375.70
03/26/2004	Spring 04	Park/Veh Violation 03/25/2004	20.00	0.00	395.70
03/30/2004	Spring 04	DEAC Payment	0.00	(395.70)	0.00
03/31/2004	Spring 04	Park/Veh Violation 03/30/2004	40.00	0.00	40.00
			<u>435.70</u>	<u>(395.70)</u>	<u>40.00</u>

DEACON ONECARD ADDITIONS (Please enter amount to add to your Deacon Onecard Account) _____

AUTOMOBILE REGISTRATION (Please enter amount of automobile registration as appropriate) _____

TOTAL AMOUNT DUE _____

If you have received notification of a financial aid award, please enter that amount on the statement as a credit and apply it toward your balance due. If you have questions regarding your financial aid award, please contact your aid office at the number listed below:
Undergraduate Office of Student Financial Aid - (336) 758-5154
Athletic Compliance and Financial Aid - (336) 758-4277

Student Financial Services Contact Information

Telephone: (336) 758-5234 Fax: (336) 758-4004 Email: FAS-AR@wfu.edu Web: <http://www.wfu.edu/sfs>
To make a payment online via DEAC, please log into the Personal Section of WIN.

Remittance Advice

Student ID#: 99270512
STAR/ABBO

Statement Date: 03/31/2004
Due Upon Receipt

School: Wake Forest University

Balance Due Before Additions 40.00
Deacon Onecard Addition _____
Automobile Registration _____

To the Responsible Party of:

Total Amount Enclosed _____

Make check payable to Wake Forest University and mail with the above stub to: P O Box 751425 Charlotte, NC 28275-1425 Write Student ID# on the check.
DETACH AND INCLUDE ABOVE PORTION WITH YOUR PAYMENT UNLESS PAYING ONLINE.

Wake Forest University
Student Account Statement
(For Information Purposes)

Student ID#: 99270512
Student Name:

Statement Date: 03/31/2004

<u>Date</u>	<u>Term</u>	<u>Description</u>	<u>Charges</u>	<u>Credits (CR)</u>	<u>Total Due</u>
03/12/2004	Fall 04	Payment	0.00	(500.00)	(500.00)
			0.00	(500.00)	(500.00)

*** Fall balances are due by August 01,2004

Student Financial Services Contact Information
Telephone: (336) 758-5234 Fax: (336) 758-4004 Email: FAS-AR@wfu.edu Web: <http://www.wfu.edu/sfs>

Appendix E: A View of DEAC Through the Eyes of a Student

The following pages depict the instructions that a student would use in order to use the DEAC system. Thorough and user friendly documentation was a hallmark of WFU's implementation.



DEAC – Deacon Electronic Account Center

Instructions: System Access and Navigation for Students

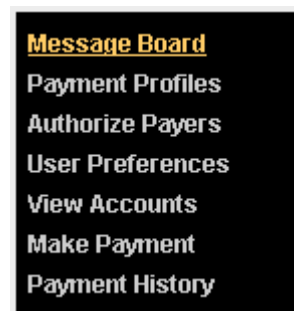
How to Log In

Students must log into DEAC through WIN. Once in WIN click on the 'Personal' tab. Click on 'DEAC – Deacon Electronic Account Center', as shown below. A new window will open.



Navigation Menu

Throughout the DEAC system the navigation menu will always be available on the left hand side of the screen. Your current location will be highlighted in old gold and underlined. Each of the menu options will be discussed in depth in the coming sections.



To move to a different menu option simply click on it.

Message Board

You will be welcomed each time you log in with the DEAC Message Board. Student Financial Services will post relevant information here pertaining to student accounts. Be sure to read the message board for the most up-to-date information and instructions.

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DEAC Message Board

Welcome to DEAC -- your Deacon Electronic Account Center!

Fall refunds will be available beginning Friday August 27th at 3:00 pm. Refunds will only be issued once all Financial Aid funds have been received.

DEAC is the place to view and pay your student account online. The system will allow you to:

- View your monthly statement
- View your account activity since your last monthly statement
- Pay online via a draft from your checking or savings account
- Pay online via your Deacon OneCard
- Grant access to parents or other authorized users to view and pay bills on your behalf

Should you need instructions on how to navigate and use DEAC, click [here](#)

For instructions on how to give parents and authorized payers access to DEAC click [here](#). Once you give them access to DEAC, please share their username and password with them. To log in, they need to navigate to <https://gp.campusoncall.com/wf/tuition/authorized.do>

If you need to contact Student Financial Services, please feel free to contact us:
Telephone: (336) 758-5234
Email: fas-ar@wfu.edu
Please be sure to include the student's name and ID number when contacting Student Financial Services via email.

Student or parent borrowers of Federal Stafford or Federal Perkins Loans have the right to cancel all or a portion of the loan disbursement that has been credited to the student's account within the last thirty days, and that remains on the student's account, by requesting in writing to the Office of Student Financial Aid the cancellation or reduction of the disbursement within fourteen days of the date this notice was sent. Please be aware that canceling any aid, however, may result in unpaid charges and therefore may prevent enrollment.

Payment Profiles

Users have the ability to store payment information. This will save you time from having to re-enter Deacon OneCard or banking information each time you make a payment.

To add a new Payment Profile, click either 'Add Deacon OneCard Profile' or 'Add eCheck Profile.'

Adding a Deacon OneCard Profile:

- Give your profile a name. This name will allow you to easily recognize the account (e.g. 'My Deacon OneCard'). You can have up to twenty characters in the name (punctuation, such as an apostrophe, is not allowed).
- Enter your name in the 'Cardholder's Name'.
- In the 'Deacon OneCard Number' field, enter your eight (8) digit student ID number. Do not enter the last digit found on your ID card.
- Enter your anticipated Graduation Date.

Press **Add** to confirm your changes.

Adding an eCheck Profile:

- Give your profile a name. This name will allow you to easily recognize the account (e.g. 'My checking account'). You can have up to twenty characters in the name (punctuation, such as an apostrophe, is not allowed).
- Enter your account information. The 'Holder's Name' should be the name on the bank account. Enter the routing and account numbers exactly how they appear your checking or savings account. Click on the ? for an explanation on where to find the routing and account numbers on your paper check.
- The address and contact information should be the account holder's information.

Add eCheck Profile

Please enter your check information in the following fields and then click "Add" button.
NOTE: All fields are required.

For help, please click on the question mark next to a field.

Profile Information	
Profile Name:	<input style="width: 80%;" type="text"/>
Account Information	
Holder's Name:	<input style="width: 80%;" type="text"/>
Account Type:	<input style="width: 80%;" type="text" value="CHECKING"/>
Routing Number:	<input style="width: 80%;" type="text"/> ?
Account Number:	<input style="width: 80%;" type="text"/> ?
Address Information	
Address 1:	<input style="width: 80%;" type="text"/>
(optional) Address 2:	<input style="width: 80%;" type="text"/>
City:	<input style="width: 80%;" type="text"/>
State:	<input style="width: 80%;" type="text" value="-- US STATE --"/>
Zip:	<input style="width: 80%;" type="text"/>
Contact Information	
Daytime Phone:	<input style="width: 80%;" type="text"/> (555) 555-1212
Evening Phone:	<input style="width: 80%;" type="text"/> (555) 555-1212

Press **Add** to confirm your changes.

Viewing all of your Payment Profiles

After entering each profile, the Payment Profiles screen will update and list each profile you have stored.

Edit	Delete	Profile Name	Account
		My Deacon OneCard	Deacon OneCard ****5678
		My checking account	CHECKING ****1111

You may edit or delete each profile whenever it is necessary by clicking on the associated icon.

Authorized Payers

Students have the ability to grant access in DEAC for parents and authorized users to view monthly statements and current account activity and pay on the student's behalf. Students can have up to five (5) authorized payers.

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Authorized Payers

Through *QuikPAY™*, you are able to authorize others to make payments to your personal accounts.

- To create a new authorized payer, please click "Add New" button.
- To modify a currently authorized payer, please click "Edit" icon.
- To delete a currently authorized payer, please click "Delete" icon.

Add New

Edit	Delete	Name	Login Name
--No Authorized Payers Saved--			

Click **Add New**.

The 'Add Authorized Payer' screen contains several items to be populated:

- Enter the name of the person you are authorizing to access your account
- Enter the login name. It must be a unique name.
- Enter a password for the authorized payer.

Note that the Password and Login Name must be at least six (6) characters long and can only use letters and digits.

Add Authorized Payer

In compliance with the Family Educational Rights and Privacy Act of 1974 (as amended), your educational records and your student account information may not be released to a third party (e.g. your spouse, parents, sponsor, etc.) without your written permission. By creating an authorized payer, you are giving written consent for that individual to view your account information and to make payments towards your account.

Name:

Create Login Name:

Password:

Confirm Password:



Add **Cancel**

NOTE: Password and Login Name must be at least six(6) characters long and can only use letters and digits.

It is the student's responsibility to communicate the login information to the Authorized Payer.

Viewing all of your Authorized Payers

After entering each authorized payers, the Payment Profiles screen will update and list each user that you have granted DEAC access to.

Edit	Delete	Name	Login Name
		Nathan Anderson	Deac99

User Preferences

The User Preferences screen is user configurable. You have the option to receive email notifications whenever an event occurs on your account, such as a new monthly bill is posted or payment is made.

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User Preferences

Notification of your statements via email defaults to your primary WFU email address. If you would like your email to go to an additional email address, please populate the 'Secondary' email address field.

Note: If you plan to set up an Authorized Payer (typically a parent) you should not set that person up as the secondary email address. The Authorized Payer will be able to configure their own email preferences under their login.

Email Addresses

Primary: student@wfu.edu
Secondary:

Notification

Email me when a bill arrives.
 Email me a copy of my payment confirmation.
 Email me when an authorized payer has made a payment.
 Send me a paper bill.

DEAC will default your Wake Forest email address into the 'Primary' email address. If you would like your email to go to an additional email address, populate the 'Secondary' email address field.

Note: If you plan to set up an Authorized Payer (typically a parent) you should not set that person up as the secondary email address. The Authorized Payer will be able to configure their own email preferences under their login.

Select any email notifications that you would like to receive.

You can decide whether or not to receive a paper bill in the mail. Within DEAC you are able to view and save the prior twelve (12) monthly billing statements. WFU encourages you to uncheck the 'Send me a paper bill'.

Press **Save** to make confirm your changes.

View Accounts

The 'View Accounts' screen defaults to show your up-to-date student account activity since your last monthly statement. This information is updated nightly.

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Account Status

Below is your recent account status.

Aid that this anticipated, that does not have a date next to it, is not eligible to be refunded.

Anticipated credits are not eligible to pay current balances.

Account: **Student Account Statement** Account Actions:

Student ID: 012345678 **Current Balance:** \$58.00
Student Name: Andrea Bohn **This information is accurate up to Tue, Oct 12, 2004**

Current Activities					
Date	Term	Description	Charges	Credits(CR)	Total Due
10/01/2004		Previous Balance	58.00	0.00	58.00
			58.00	0.00	58.00

To look at your current monthly statement, prior statements or make a payment, use the drop down box.

Account Actions:

- Select Action
- Current Statement
- Statement History
- Make Payment

Current Statement

The 'Current Statement' screen shows your most recent monthly statement. The first table shows what is currently due; the second table shows anticipated future activity. To see a PDF version of your paper bill, click on 'Printable Statement.'

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Current Statement

Below is your current statement.

- To view your statement history, please select "Statement History" from the dropdown list.
- To make a payment, please select "Make Payment" from the dropdown list.

Account: **Student Account Statement** Account Actions:

 [Printable Statement](#)

Student ID: 1234567890 **Statement Date:** April 30, 2004
Student Name: Wendy Logan **Due Upon Receipt**

Statement Details					
Date	Term	Description	Charges	Credits(CR)	Total Due
04/01/2004		Previous Balance	20.00	0.00	20.00
04/15/2004	Spring 04	Park/Veh Violation 04/13/2004	50.00	0.00	70.00
04/30/2004	Spring 04	Payment	0.00	(20.00)	50.00
04/26/2004	Summ 1 04	TUITION	1,880.00	0.00	1,930.00
			1,950.00	(20.00)	1,930.00

If you have received notification of a financial aid award, please enter that amount on the statement as a credit and apply it toward your balance due. If you have questions regarding your financial aid award, please contact your aid office at the number listed below:
Undergraduate Office of Student Financial Aid - (336) 758-5154
Athletic Compliance and Financial Aid - (336) 758-4277

If you plan to live in campus housing for the summer, please add to your payment \$360 for double room rent and \$540 for single room rent for each session that you plan to live in campus housing.

Preliminary Activity for the Upcoming Semester(s)					
Date	Term	Description	Charges	Credits(CR)	Total Due
02/18/2004	Fall 04	Payment	0.00	(500.00)	(500.00)
			0.00	(500.00)	(500.00)

*** Fall balances are due by August 01,2004

Statement History

The 'Statement History' screen shows a listing of your previous twelve (12) monthly statements. To view the detail of a particular statement, click on the magnifying glass in the 'Detail' column.

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Statement History

To view a specific statement, please click the appropriate "Detail" icon.

Account: **Student Account Statement** Account Actions:

Detail	Billing Date	Balance	Due Date	Amount Due
	09/30/2004	\$58.00	Not Available	\$58.00
	08/31/2004	CR \$19.00	Not Available	CR \$19.00
	07/31/2004	CR \$20.00	Not Available	CR \$20.00
	06/30/2004	\$13,655.00	Not Available	\$13,655.00
	05/31/2004	\$20.00	Not Available	\$20.00
	04/30/2004	\$1,930.00	Not Available	\$1,930.00
	03/31/2004	\$20.00	Not Available	\$20.00
	02/29/2004	\$50.00	Not Available	\$50.00
	01/31/2004	\$505.00	Not Available	\$505.00
	12/31/2003	CR \$50.00	Not Available	CR \$50.00
	12/31/2003	CR \$50.00	Not Available	CR \$50.00
	11/30/2003	\$15,625.00	Not Available	\$15,625.00

Make Payment

Users can use DEAC to pay their University bills. You can pay your student accounts, recharge your Deacon OneCard or pay automobile registration fees.

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Enter Payment Amounts

Please enter in the amount you want to pay for each account and click "Pay" button.

Account		
Student Account Statement	Amount Due	\$58.00
	Payment Amount	<input type="text"/>
Deacon OneCard Recharge	Payment Amount	<input type="text"/>
Automobile Registration	Payment Amount	<input type="text"/>

-- Deacon OneCard --

Indicate the amount that you want to pay in the 'Payment Amount' fields. If you do not want to pay a particular charge just leave the field blank.

Once you have entered the appropriate amounts, choose the payment profile from the drop down box. You can choose a profile that you have already set up (e.g. 'My Deacon OneCard') or if you want to do a one-time payment choose either '-- Deacon OneCard --' or '-- eCheck --'.

-- Deacon OneCard --
-- Deacon OneCard --
My Deacon OneCard
-- eCheck --
My checking account

Click **Pay**.

Payment History

The 'Payment History' screen will show all the payments that have been made toward your account.

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Online Payment History

Listed below are all online payments made to your account. To view transaction details, click the appropriate "Detail" icon.

NOTE: Invalid transactions are identified by the "Invalid Transaction" icon next to the confirmation number.

Detail	Confirmation Number	Date	Amount	Account	Payment Method	Payer
	1117	12/01/03	\$250.00	Student Account Statement	Deacon OneCard	Wendy Logan

For details about a particular transaction, click on the magnifying glass icon under the 'Detail' column.

Contact Information

If you experience any technical issues within the DEAC system or have questions regarding the information contained within it, please contact Student Financial Services:

Telephone: (336) 758-5234
Email: fas-ar@wfu.edu