Student Financial Services

The Office of Student Financial Services is happy to assist you with questions regarding tuition and fees, student billing, payment options, and due dates. CWRU uses an online billing system and allows students to give parents and other third parties access to their student account and bill.

Please visit us online at case.edu/finadmin/controller/bursar for more information or call 216.368.2226. Our office in Yost Hall 145 is open Monday through Friday from 8:30 a.m. to 5 p.m.

Financial Aid

The Office of University Financial Aid is here to assist you in financing your education.

The Office of University Financial Aid also maintains two related offices: the Office of Student Employment (Yost Hall 412) and the Office of External Loans (Yost Hall 429). Our counselors are available weekdays throughout the academic year and summer to meet with families on a walk-in basis between 9 a.m. and 4:30 p.m.

The CWRU financial aid application, awards and other related documents are available through My Financial Aid using your CWRU Network ID and password. Go to financialaid.case.edu or call 216.368.4530 for more information.

The Student Financial Guide provides you with a step-by-step look at how to manage billing and financial services at Case Western Reserve University. The images show you the pages you will encounter in the Student Information System and how to navigate the process.
Student Information System

The Student Information System (SIS) is a secure, flexible, web-based environment for creating and maintaining your academic and financial information.

Sign in is simple and secure

To access the Student Information System, visit case.edu/sis.

Students: Use your CWRU Network ID and password.
Authorized Users: Use the ID and password provided by the student.

TIPS: User IDs and passwords are case sensitive.

- Save the URL as a favorite.
- No VPN required.

Once in the SIS, do not use your Internet browser’s back button; this could cause you to lose information.

IMPORTANT SECURITY FEATURE: You automatically will be signed out of SIS after 20 minutes of inactivity.
Finances

In the **Finances** section of SIS, you can access the following areas:

1. **Health Fee Waiver**: The CWRU Medical Plan fee is automatically charged on a per semester basis to students registered for one or more credit hours. If you already have health coverage, you are eligible to waive the Medical Plan fee.

2. **121 Fitness Waiver (for graduate and professional students ONLY)**: The 121 Fitness fee is charged automatically on a per semester basis at the time of registration for access to the 121 Fitness Center facilities on campus. You may waive the fee if you do not want to be enrolled in the fitness plan. This is an opt-out option and applies only to graduate and professional students. See page 18 for more information.
3 **Account Inquiry** View account details or make a payment.

4 **Account Activity** View up-to-the-minute account activity and history.

5 **Manage Student Refunds** Enroll in direct deposit for refunds from financial aid disbursements and any other overpayments. See page 14 for setup instructions. Request online that refunds be applied to future terms.

6 **Payments** View all credits applied to your account.

7 **Pending Aid** View financial aid that is expected to post to your account. *(Please verify with the Office of University Financial Aid that all required documents are complete.)*

8 **View Billing Statements/Make a Payment** View your billing statements and make payments to your account.

9 **Authorized Users** Set up an authorized user account for parents, spouses or other third parties who you would like to have access to your student financials and/or class schedules and grades. Please see page 20 for setup instructions.

10 **View Student Permissions** Use this section to grant financial aid permission to pay the 121 Fitness Center fee (graduate and professional students only).

11 **Other Financial Links** Access external financial resources.
Student Checklist

Before the start of the semester, make sure ...

- The Office of University Financial Aid has received all requested financial aid documents
- All offered financial aid has been accepted or declined
- Necessary Federal Direct Loan entrance counseling has been completed*
- If applicable, a Federal Direct Loan Master Promissory Note has been e-signed*
- If applicable, a Federal Perkins Loan Master Promissory Note has been e-signed*
- If applicable, a University Loan Promissory Note has been e-signed*
- If necessary, an application and promissory note for supplemental financing through a private lender or Federal PLUS Loan has been completed
- Your Health Plan waiver has been submitted online if you have other insurance coverage
- Your fall tuition bill has been reviewed through the Student Information System
- External scholarship checks have been submitted to the Office of University Financial Aid.

Information on all of the above tasks is available on the My Financial Aid website at financialaid.case.edu/myfinancialaid.aspx.

* Where applicable, an emailed or mailed notification will be sent to the student (and parent) with instructions on completing the promissory notes and entrance counseling.
Pending Aid

The Pending Aid tab can be accessed by clicking the Account Inquiry link from the Finances section in SIS or from the Other Financials drop-down list on the Student Center page in SIS.

Aid must be accepted through My Financial Aid to be listed as pending aid; however, not all pending aid is reflected in this view. Earnings through the Federal Work Study program, external scholarships for which the check is not received, and credit-based loans such as private or PLUS loans for which an approved application has not been received from the lender will not appear as pending aid.

Students: Log into My Financial Aid for a complete view of the financial aid award at financialaid.case.edu/myfinancialaid.aspx. Select the Awards by Term tab.
My Financial Aid

The Office of University Financial Aid offers a number of services on the My Financial Aid website.

**Students:** Log into *My Financial Aid* using your CWRU Network ID and password at [financialaid.case.edu/myfinancialaid.aspx](http://financialaid.case.edu/myfinancialaid.aspx).
From *My Financial Aid* you can …

- Complete the CWRU Financial Aid Application using the **Apply Online** tab
- Accept/decline/reduce loans through the **Accept Your Awards** tab
- Check the status of your financial aid application on the **Documents** tab
- View your financial aid award through the **Awards by Term** tab
- View important messages concerning your award
- Track your direct loan history
- View disbursements of your aid

Scholarships awarded from organizations outside of the university must be submitted to the Office of University Financial Aid for processing.

Checks that are payable to the student and the university require the student’s endorsement before deposit. Scholarship checks remitted without disbursement instructions will be split evenly between the fall and spring semesters. **Do not mail scholarship checks to the P.O. Box address listed on the invoice.** The mailing address for the Office of University Financial Aid is available at right.

If you have any questions or have difficulty accessing *My Financial Aid*, please contact the Office of University Financial Aid at 216.368.4530 or financialaid@case.edu.
Student Accounts

The Student Information System (SIS) allows students and authorized users to view detailed listings of all activity on the student account.

Important Note:

In accordance with the federal regulations established by the Family Educational Rights and Privacy Act (FERPA), **students must authorize their parents or other third parties to view their tuition account/bill.** Tuition bills are the responsibility of the student, and only the student can control access to his or her bill. If the student would like a third party to have access to view and/or pay the bill online, simply add the individual as an authorized user. See page 20 of the Student Financial Guide for instructions.
Billing and Payments

CWRU uses a paperless tuition billing system. Instead of mailing a paper bill, the student, as well as any authorized users, will receive a billing notification via email. The message informs the student that new billing information is available and provides the access link, case.edu/sis.

You can make an online payment and view your bill through the Account Inquiry screen.

Click the Make a Payment tab and then click "open online billing and payment system."

**NOTE:** Clicking the "open online billing and payment system" link opens a new window into the billing system. Please ensure any pop-up blockers are temporarily disabled.
Billing

The current billing statement shows your account activity as of the billing date. For new activity since your last billing date, please use the Account Inquiry link from the Student Center.

The current billing statement will include all charges, credits and pending financial aid for the current billing cycle. Subsequent billing statements will only reflect new charges and payments.
Payment options

**Online payment options: Preferred method**

1. E-check or savings deduction
2. Discover, MasterCard, Visa and American Express *(a convenience fee of 2.7 percent will be added to your transaction for all credit cards)*
3. International wire transfer

**NOTE:** Online e-check, savings deductions and credit card payments are reflected immediately in the student’s SIS account.

**Other payment options:**

1. Mail payment using PDF version of the bill
2. Pay in person at the Cashier’s Office (Yost Hall, Room 165)
3. Wire transfer *(please contact the Office of Student Financial Services for more information)*

**NOTE:** Checks and money orders should be in U.S. dollars drawn on a U.S. bank, and made payable to “Case Western Reserve University.” Please include the student’s ID number on the check or money order.

**Payment Mailing Address:**

Case Western Reserve University, P.O. Box 74056, Cleveland, OH 44194

**Correspondence/Delivery by Courier:**

Case Western Reserve University, Student Financial Services, Yost Hall, Room 145, 10900 Euclid Ave., Cleveland, OH 44106-7043
Direct Deposit for Refunds

Direct deposit is now available for student refunds. Direct deposit allows your refund payments to be conveniently delivered into your bank account. Once enrolled, all future refunds and financial aid overpayments will be deposited in the same manner. Students are expected to maintain their bank account information within SIS.

Interested students should select the new Manage Student Refunds option available in the SIS Finances section. To sign up for the benefits of direct deposit, follow the instructions below.

NOTE: Direct deposit can only be made to domestic bank accounts. If your bank’s routing number is not accepted, contact Student Financial Services at 216.368.2226 for assistance.

Direct Deposit Enrollment

This section guides you through the steps to sign up for direct deposit refunds.

Students may enroll at any time during their school career. The agreement will remain in effect unless the Office of Student Financial Services is asked to revoke the agreement by the student or in the event of a rejected direct deposit transaction. Students must contact Student Financial Services by email or phone to request all future refunds be sent as checks.

An email will be sent within 48 hours confirming a successful enrollment.

1. Log in to SIS at case.edu/sis.

2. From the Other Financial selection tool, select Manage Student Refunds. Click the Direct Deposit tab. Alternatively, from the Account Inquiry link, click the Account Services tab, and then Direct Deposit.

3. Click the “Enroll in Direct Deposit” button.

4. Enter the requested bank account information and then click “Next.”
5 A summary screen of the bank account information entered is displayed. Click the “Proceed To Enroll in Direct Deposit” button.

6 You may add additional bank accounts to be used for tuition direct deposits by using the “Add Another Bank Account” button. However, only one bank account for direct deposit refunds can be selected at one time. Once all desired accounts have been added, click the “Proceed To Enroll in Direct Deposit” button again.

7 The Enroll in Direct Deposit screen appears. From the Select Bank Account selection tool, click on your bank account. Click “Next.”

8 Read the terms of agreement. Click the checkbox to agree and then the “Submit” button.

9 When the “congratulations” message is displayed, you have successfully enrolled in direct deposit.
Changing Direct Deposit Accounts

Students can modify their bank account information at any time. This procedure will change the destination account for any future refunds but will not affect any refunds in progress. An email notification will be sent within 48 hours any time a change in the direct deposit distribution occurs.

Follow the steps below to change your direct deposit account.

1. Log in to SIS at case.edu/sis.

2. From the Other Financial selection tool, select Manage Student Refunds. Click the Direct Deposit tab. Alternatively, from the Account Inquiry link, click the Account Services tab, and then Direct Deposit.

3. Click the “Modify Direct Deposit” button.

4. For security purposes, only the account’s nickname is editable. To make any other changes, all information must be reentered as a new bank account. Click the “Add Another Bank Account” button.

5. Enter the requested bank account information and then click “Next.”

6. A summary screen of the bank account information entered is displayed. Click the “Proceed To Modify Direct Deposit” button.
7 You may add additional bank accounts to be used for tuition direct deposits by using the “Add Another Bank Account” button. However, only one bank account for direct deposit refunds can be selected at one time. Once all desired accounts have been added, click the “Proceed To Modify Direct Deposit” button again.

8 The Modify Direct Deposit screen appears. From the Select Bank Account selection tool, click on your bank account. Click “Next.”

9 Read the terms of agreement. Click the checkbox to agree and then the “Submit” button.

10 When the “congratulations” message is displayed, you have successfully enrolled in direct deposit.

Applying Refunds to Future Semesters

Students can request online that a refund be held and applied to future semesters.

1 From the Other Financial selection tool, select “Manage Student Refunds.”

2 On the Manage Student Refunds page, place a checkmark in the box, and select “save.”

This agreement can be rescinded at any time, by returning to the page and clearing the checkbox.
Graduate and Professional Students
121 Fitness “Opt-Out” Process

CWRU is providing an exciting new program option as part of the university’s overall wellness initiative.

Effective with the Fall 2014 semester, graduate and professional students will be enrolled automatically as members of 121 Fitness Center at a discounted rate of $29/month ($116 for fall semesters and $145 for spring semesters; no initiation fee). With permission, you may use financial aid to pay for this membership fee. If you do not wish to use this benefit, you may opt out by the end of the drop/add period of each semester.

At the end of the registration process, you will see an announcement of the 121 Fitness membership fee below the “Health Waiver” button. Below are detailed instructions on how to keep the membership and use financial aid, or how to opt out.

**Keep Fee**
*(You WILL have full access to 121 Fitness Center this semester)*

1. If you are on the Registration Results screen, select “Click HERE to grant financial aid permission to pay this fee.” You also can access this page by clicking the Account Inquiry link in the Finances section of the Student Center homepage. Click the Account Services tab. Finally, click the Student Permission tab.

2. If you have not allowed excess financial aid to pay for the 121 Fitness membership fee, you will see a message stating “No student permission information on file.” Click the green “Grant Permissions” button.

3. Read the agreement carefully and then select the green “Next” button.
4 Read the final page carefully. If you agree, click the checkbox for “Yes, I have read the agreement.” Finally, click the green “Submit” button. You have successfully granted consent when you see “Your permission form has been accepted.”

**Waive Fee**

*(You WILL NOT have access to 121 Fitness Center)*

1. If you are on the **Registration Results** screen, select “Click HERE to Waive the 121 Membership Fee.” If you are in the **Finances** section of the Student Center homepage, click the “Waive 121 Fee” link.

2. Click the “Waive” checkbox and then select “Save 121 Membership Fee.” You have successfully waived the 121 fee when you see “Optional fee has been updated” with the “Waive” checkbox selected.
Set Up Authorized Users

From the Student Center homepage, click the Authorized Users link in the Personal Information tab.

This will bring you to the Authorized Guest Setup screen. Use this screen to set up an authorized user account for parents, spouses, or other third parties who you would like to have access to:

- Student Finances
- Academic Information
- Student Center

Authorized users with financial access can view your bill, billing history, account activity and pending aid and can make an online payment.

Authorized users with access to Student Center also can waive the health fee.

**NOTE:** All third parties must be set up as authorized users per FERPA compliance.
Contact Us

STUDENT FINANCIAL SERVICES
studentaccounts@case.edu
case.edu/finadmin/controller/bursar
P 216.368.2226
F 216.368.1929
10900 Euclid Ave.
Yost Hall, Room 145
Cleveland, OH 44106-7043

CASHIER’S OFFICE
cashier@case.edu
case.edu/finadmin/controller/cashier.htm
P 216.368.4276
10900 Euclid Ave.
Yost Hall, Room 165
Cleveland, OH 44106-7043

OFFICE OF UNIVERSITY FINANCIAL AID
financialaid@case.edu
financialaid.case.edu
P 216.368.4530
F 216.368.5054
10900 Euclid Ave.
Yost Hall, Room 435
Cleveland, OH 44106-7049

Other Useful Information

HOUSING, RESIDENCE LIFE & GREEK LIFE
housing@case.edu
housing.case.edu
P 216.368.3780
F 216.368.6658

MEAL PLAN/CASE CASH
mealplan@case.edu
case.edu/diningservices/mealplan.htm
P 216.368.5844
F 216.368.1096

STUDENT EMPLOYMENT OFFICE
financialaid.case.edu/studentemployment
P 216.368.4533
F 216.368.5054

University Health Service
healthservice@case.edu
studentaffairs.case.edu/health/services
P 216.368.2450
F 216.368.8530