

# Electronic Billing & Documentation

A decorative horizontal bar with a black background and a yellow and red arrow pointing to the right on the left side.

Cadet Accounting

1 May 2024



# Agenda

- Billing
- Proxy
- Ecommerce & FERPA
- VMI Notes





# Electronic Bill Notification

- Bills are viewed in **Post View**
- The Cadet Accounting Office will send an email to your VMI email account when the bill is ready for viewing. Individual bills are not sent to cadets
- Cadets and families should visit the VMI Cadet Accounting website for more information on payment due dates & additional information <https://www.vmi.edu/about/offices-a-z/financeandbudget/cadet-accounting/>



# Logging into Post View

A screenshot of the Virginia Military Institute website. The top navigation bar includes links for 'Inquire', 'Visit', and 'Apply'. Below this, there are links for 'MYVMI', 'OFFICES A-Z', 'CALENDAR', 'WEBCAMS', and 'DIRECTORY'. A search bar is located on the right. The main content area features a large image of three cadets in uniform standing in front of a red fire truck and an ambulance. To the right of the image is a text box with the heading 'Cadet EMTs Provide Comfort and Care' and a paragraph of text.

[Inquire](#) [Visit](#) [Apply](#)

[MYVMI](#) [OFFICES A-Z](#) [CALENDAR](#) [WEBCAMS](#) [DIRECTORY](#)

[About](#) [Academics](#) [Admissions and Aid](#) [Cadet Life](#) [Athletics](#) [Give](#)

## Cadet EMTs Provide Comfort and Care

Every day, a group of [cadets volunteer as Emergency Medical Technicians \(EMTs\)](#) on post to provide life-saving medical care in emergency situations. In addition to their efforts on post, several cadet EMTs volunteer in the community.

- Click MYVMI from VMI website or go directly to <https://my.vmi.edu/>
- Click on Post View which redirects to authentication page
- Enter user name and login



# Post View Home Page

[Back to VMI.edu](#)

## VMI Post View

Post View is Virginia Military Institute's internal system used to process admissions applications, manage cadet billing, register for classes, and employee benefits information.



Applicant	Cadet	Employee, Faculty	Proxy
<p>To begin the VMI application, you will first need an applicant account. Visit the <a href="#">VMI Apply page</a> for full instructions on starting and completing the application process.</p> <p>If you have received your VMI applicant account UserID and password via email, you are able to access to the VMI application portal.</p> <p>To login, your UserID must be followed by <a href="#">@mail.vmi.edu</a> on the authentication page.</p> <p><a href="#">Login Using your VMI Applicant Account</a></p>	<p>You must use your VMI Network UserID and your NETWORK password to login. This is NOT necessarily your email password.</p> <p>Your VMI Network UserID must be followed by <a href="#">@mail.vmi.edu</a> on the authentication page.</p> <p><a href="#">Login Using your VMI Network Account</a></p>	<p>You must use your VMI Network UserID and the same password as your email to login</p> <p>Your VMI Network UserID must be followed by <a href="#">@vmi.edu</a> on the authentication page.</p> <p><a href="#">Login Using your VMI Network Account</a></p>	<p>You must have the UserID created when your Cadet set up your Proxy access.</p> <p>Your password was sent in a separate email when the UserID was created.</p> <p><a href="#">Login Using your VMI Proxy Account</a></p>

To start the log in process, you will need to choose the appropriate link.

Cadets:

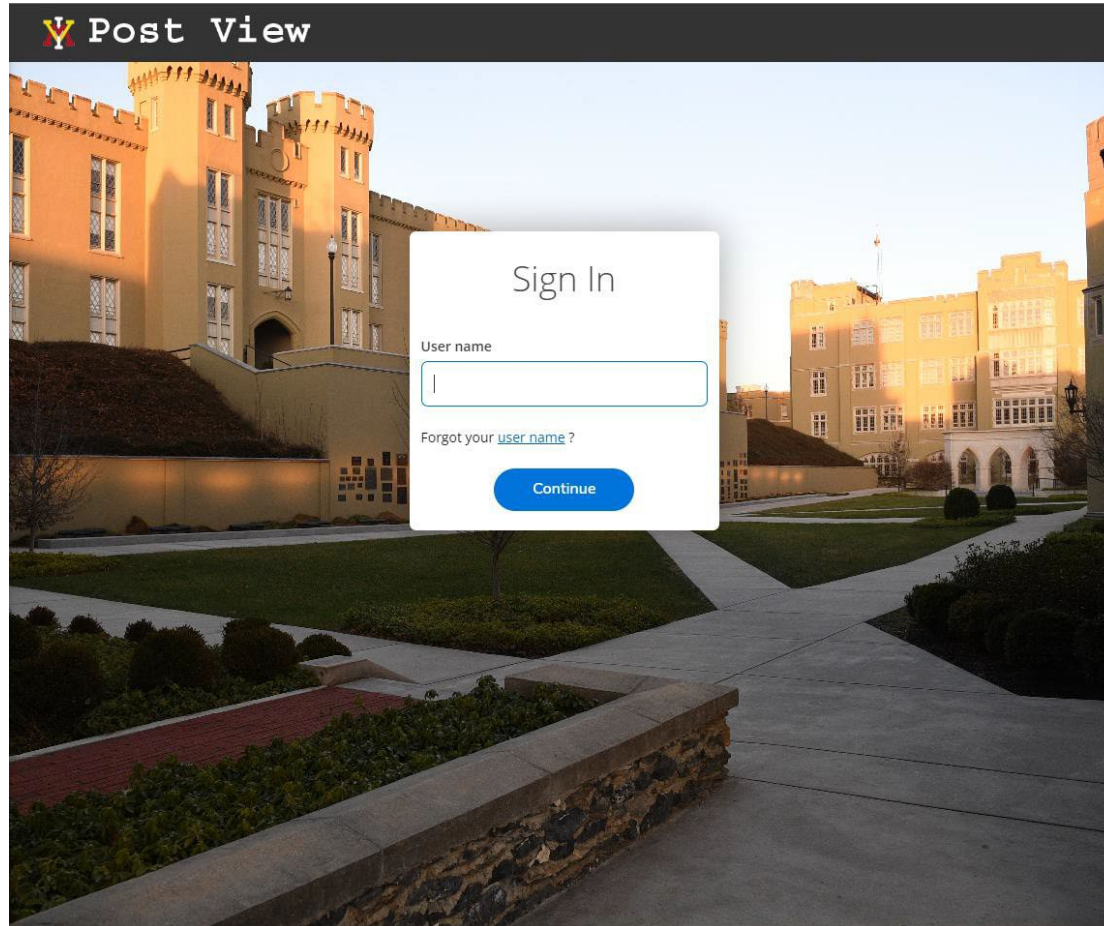
Choose “Login Using your VMI Network Account” in the Cadet box.

Proxy Users:

Choose “Login Using your VMI Proxy Account” in the Proxy box.



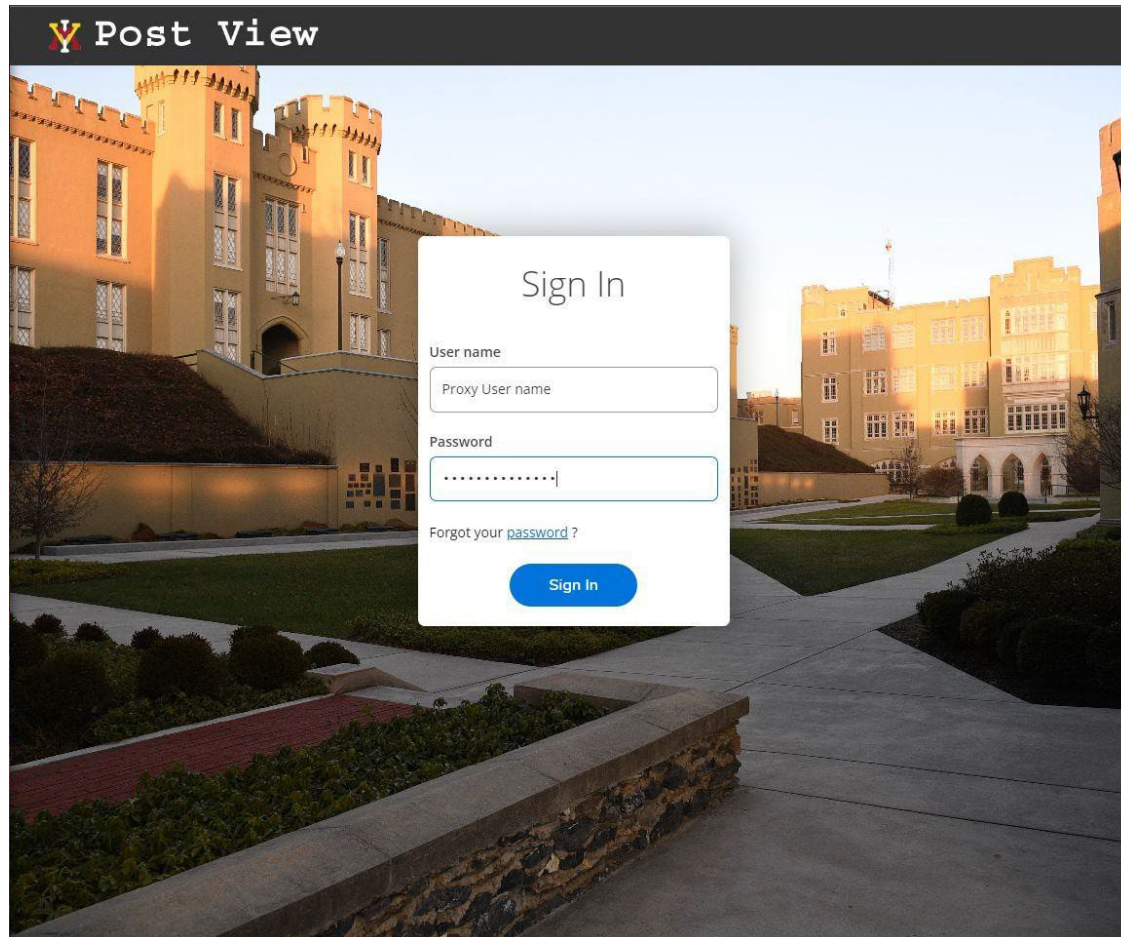
# Proxy Sign In Page



- Proxy users will then need to enter their assigned “User name” on this screen.
- The User name is sent by email after the cadet designates Proxy Access.



# Proxy User Sign In



- You will then be requested to supply your password on this page.
- A separate email is sent that contains the temporary password after the cadet has designated Proxy Access. The Proxy User will be prompted to change this password during the first Sign In.





# Cadet Authentication Page



Virginia Military Institute

Sign in

Sign in

**Current Cadet:** Log in using your VMI email address (i.e. smithjd26@vmi.edu) and password.

**Employee:** Log in using your VMI email address (i.e. smithjd@vmi.edu) and password.

- **Cadet:**  
Log in using your VMI email address (i.e. smithjd27@vmi.edu) and password.
- If needed, you can go to [Self Service Password](#) and reset your password.
- **Need Assistance with Account or Password:**  
Contact the VMI Help desk at 540-464-7643 or send email to [help@vmi.edu](mailto:help@vmi.edu)







# Post View processes

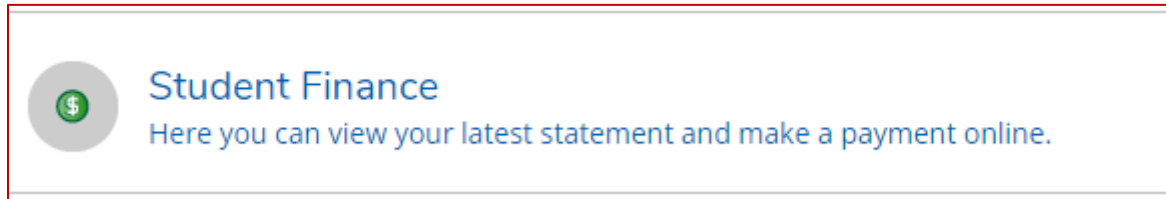
The screenshot shows the 'Post View' dashboard. At the top, there is a navigation bar with the 'Post View' logo, a user profile 'testingim', 'Sign out', and 'Help' options. Below the navigation bar, a welcome message reads 'Hello, Welcome to VMI Post View!' followed by the instruction 'Choose a category to get started.' A 'Notifications' section contains a table with one entry: 'Documents Required' with the details 'There are 1 requests from your institution that require your action.' and a link 'View required documents'. Below the notifications are several tiles for different services: 'Student Finance' (with a green dollar sign icon), 'Financial Aid', 'Tax Information', 'Employee', 'Student Planning', 'Course Catalog', 'Grades', 'Program Evaluation and Graduation', 'Nonacademic Attendance', 'Academic Attendance', and 'Cadet'. A red arrow points from the bottom left towards the 'Student Finance' tile. At the bottom of the dashboard, there is a copyright notice: '© 2000-2022 Ellucian Company L.P. and its affiliates. All rights reserved. Privacy'.

- Select the Student Finance tile to review account activity and to review your bill

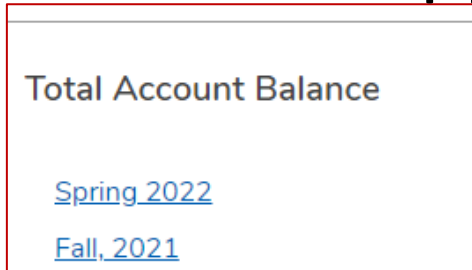


# To view your bill, click on **Student Finance**

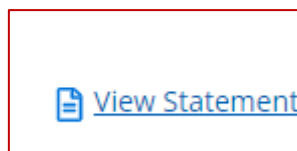
➤ Click on student finance



➤ Choose the appropriate semester



➤ Top right corner click “view statement”





# Sample Statement

Virginia Military Institute  
Cadet Accounting  
310 Smith Hall  
Lexington, VA 24450



Name	[Redacted]
Student ID	[Redacted]
Total Balance	\$0.00
Total Amount Due	\$0.00
Amount Enclosed	

Please return this portion of the statement to the institution, along with your payment.

Date Generated: 6/29/2022

## Account Activity Summary - Spring 2022

Charges	
Tuition by Total	\$29,343.00
<b>+ Total Charges</b>	<b>\$29,343.00</b>
<b>- Financial Aid</b>	<b>\$29,343.00</b>
<b>= Spring 2022 Balance</b>	<b>\$0.00</b>
<b>= Total Amount Due</b>	<b>\$0.00</b>
<b>Total Balance</b>	<b>\$0.00</b>

Account Activity Details - Spring 2022




# To make a payment

- Click on Financial Aid



**Financial Aid**  
Here you can access financial aid data, forms, etc.

- Go to Account Summary



Student Finance Account Summary

Amount Due	\$0.00
Amount Overdue	\$0.00
<b>Total Amount Due</b>	<b>\$0.00</b>

[Go to Account Summary](#)

- Click on Make a Payment

Total Amount Due	\$0.00	<a href="#">Make a Payment</a>
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# Protecting your User ID

- Sharing your User ID and password is not authorized.
- Rather than sharing your User ID and password, you will be allowed to designate authorized proxy (formerly bill payer).
- Proxy may only access your billing information in Post View.
- Designate a proxy for financial functions **only** if someone other than yourself will need to view or pay the bill.
- Note: Becoming a proxy does not authorize release of information either verbal or written (see FERPA release).



# Designate an Authorized Proxy

A screenshot of the VMI Post View web application. The interface is dark-themed with a sidebar on the left and a main content area. The sidebar has a 'User Options' menu item highlighted in blue, with a user icon next to it circled in red. A red arrow points from this icon to a drop-down menu in the top right corner of the main area, which is also circled in red. This menu contains several options, with 'View/Add Proxy Access' circled in red. Another red arrow points from this menu item to the 'View/Add Proxy Access' option in the 'User Options' sidebar menu, which is also circled in red. The main content area displays a welcome message and several service tiles for Student Finance, Financial Aid, Tax Information, Student Planning, Grades, Academic Attendance, Financial Aid, Employee, Course Catalog, Program Evaluation and Graduation, and Cadet. A copyright notice is visible at the bottom of the page.

- Click on either user option to display a drop-down menu
- Click on “View/Add Proxy Access”



# Adding a Proxy



A screenshot of the 'Post View' web application interface. The page title is 'View/Add Proxy Access'. It contains three main sections: 1. 'Proxy User Access' with an information icon and text explaining that proxy users can interact with the system and listing required documentation. 2. 'Active Proxies' with an information icon and a message stating that no proxies are currently designated. 3. 'Add a Proxy' with an information icon and text explaining the process of adding a proxy user, including a link to a 'Proxy User Setup (CMP21)' form. At the bottom, there is a dropdown menu labeled 'Select a Proxy' with the text 'Please Select'.

- The first paragraph explains the proxy user process
- The Active Proxies area displays any current designated proxies
- The Add a Proxy area displays instructions for adding a proxy or the necessary steps to complete to have an individual made available to add as a proxy.







# Reviewing Active Proxy

Name	Proxy Access	Relationship	Effective Date	
	Student Finance	Parent	5/26/2022	

- If a proxy has already been designated, they will show in the Active Proxies section
- Cadets can click the pencil to edit and review proxy details

### Edit Proxy Details

Name 



Email Address  Relationship Parent

Access

Allow Complete Access

Allow Select Access

Remove All Access

<input type="checkbox"/> Student Finance 	<input type="checkbox"/> Financial Aid 
<input type="checkbox"/> Account Activity	<input type="checkbox"/> Offer Letter
<input type="checkbox"/> Account Summary	<input type="checkbox"/> Financial Aid Home
<input checked="" type="checkbox"/> Make a Payment	<input type="checkbox"/> My Awards
	<input type="checkbox"/> FA Required Documents

Cancel Save





# Adding a Proxy

## Add a Proxy

You may provide proxy access to a person with a Virginia Military Institute documented personal relationship to you in the Institute's Student system. Required documentation includes the person's name, current address, type of relationship and current email address. Choose a person shown in the drop down list below to start the process. In the next step you will then choose the specific types of access "you" desire be assigned to the selected person.



If a user you desire does not show in the list, please complete the [Proxy User Setup \(CMP21\)](#) form to have desired users made available for you to complete the View/Add Proxy Access creation process. You will be notified by email after the form has been processed. You will then be able to select users and designate their appropriate proxy access.

If you have any questions about completion of the form, please contact the [VMI Help Desk](#) at 540-464-7643.

Select a Proxy

Please Select

- To view current eligible family members, click the “Select a Proxy” drop down
- If you wish to add a proxy that isn't listed, select the “Proxy User Setup (CMP21)” link. Cadets will complete a form and cadet accounting will enter the information. Allow 48 hours for the person to be added. The cadet will receive an email when the process has been completed.



# Example Proxy Options

[Redacted]

Email Address: [Redacted] Relationship: Brother

Access

Allow Complete Access

Allow Select Access

<input type="checkbox"/> <b>Student Finance</b> ⓘ	<input type="checkbox"/> <b>Financial Aid</b> ⓘ
<input type="checkbox"/> Account Activity	<input type="checkbox"/> Offer Letter
<input type="checkbox"/> Account Summary	<input type="checkbox"/> Financial Aid Home
<input type="checkbox"/> Make a Payment	<input type="checkbox"/> My Awards
	<input type="checkbox"/> FA Required Documents
	<input type="checkbox"/> College Financing Plan
<input type="checkbox"/> <b>General</b> ⓘ	<input type="checkbox"/> <b>Academics</b> ⓘ
<input type="checkbox"/> Notifications	<input type="checkbox"/> Grades
<input type="checkbox"/> Required Documents	
<input type="checkbox"/> <b>Tax Information</b> ⓘ	
<input type="checkbox"/> Tax Information	

- Choose the access desired for this specific proxy user. You may have multiple proxies, and each can be provided different types of access.





# Proxy Disclosure Agreement

## Disclosure Agreement

### \*\*\*\*\* NOTICE \*\*\*\*\*

You are designating access to information that is protected by Federal Privacy Law. Disclosure to unauthorized parties violates the Family Educational Rights and Privacy Act (FERPA). You should not attempt to proceed unless you are specifically authorized to do so and are informed about FERPA. When accessing the system, your designee must access only that information needed to complete the assigned or authorized tasks. You may designate this access only to other parties authorized to have access in accordance with the provisions of FERPA. Information pertaining to VMI's FERPA policies can be found at the following web address:

[VMI Ferpa Policy](https://www.vmi.edu/ferpa) OR key in: <https://www.vmi.edu/ferpa>

If you have any questions about FERPA or the appropriate release of information, please contact the Registrar's Office, at 540-464-7213.

I authorize the institution to disclose my information to this party

Cancel

Save

- Once you have chosen the proxy options, read the disclosure message, check the box and click save. This will send emails to the proxy at the email address associated in the VMI system to the proxy user. The proxy will receive one email with username and another email with password.
- The Proxy will log in with their new credentials and follow the same procedures as cadets to make a payment.



# Electronic Payment Methods

- Payment via electronic check (**eCheck**)
  - By entering your account information from a check you can automatically deduct the payment from a checking account with no additional fees.
- American Express, Discover, Master Card and VISA will be accepted for payment (**convenience fee of 2.6% will be assessed**).
  - Electronic payments automatically post to your VMI account.



# Other Payment Methods

- Mail a check payable to
  - VMI
  - Cadet Accounting Office
  - 310 Smith Hall
  - Lexington, VA 24450
- Credit Card payments can be accepted over the phone or in person however, we strongly encourage use of Post View electronic payments. (2.6% convenience fee will be assessed)
- Nelnet Payment plans
  - [MyCollegePaymentPlan.com/vmi](https://MyCollegePaymentPlan.com/vmi)



# FERPA Release

In accordance with the Family Educational Rights and Privacy Act (FERPA) cadets must designate authorized individuals who can be given information and the type of information to be provided by the **Cadet Accounting and Financial Aid Office.**

- Complete Student Release in PostView
- Required prior to registration
- Completed annually



## To access FERPA/e-Commerce

- Cadet's will receive an email annually reminding them to complete the FERPA form in PostView. When a family member calls or visits Cadet Accounting or Financial Aid the Student Release form will be checked. Family members will need to confirm the pin number you created before information to be released.



# Payment Due Dates

- Summer One Semester (check website annually for changes in dates)
  - Full payment due 10 May
  - Promissory note Balance must be paid by 15 June
- Summer Two Semester (check website annually for changes in dates)
  - Full payment due 24 June
  - Promissory note Balance must be paid by 15 July
- Fall Semester
  - Full payment due 1 August
  - Promissory note Balance must be paid by 15 October
- Spring Semester
  - Full payment due 15 December
  - Promissory note Balance must be paid by 15 March





# VMI Notes

- Eligible Cadets will receive an email with a link to sign the promissory notes along with the amount due for the semester. There could be three separate promissory notes.
  - ROTC promissory note (all classes)
  - Direct loan promissory note (incoming cadets only)
  - Payment plan promissory note (Fall or spring)
  - Tuition promissory note (upper class only)
- Click the link in the email to sign the promissory note using Etrieve

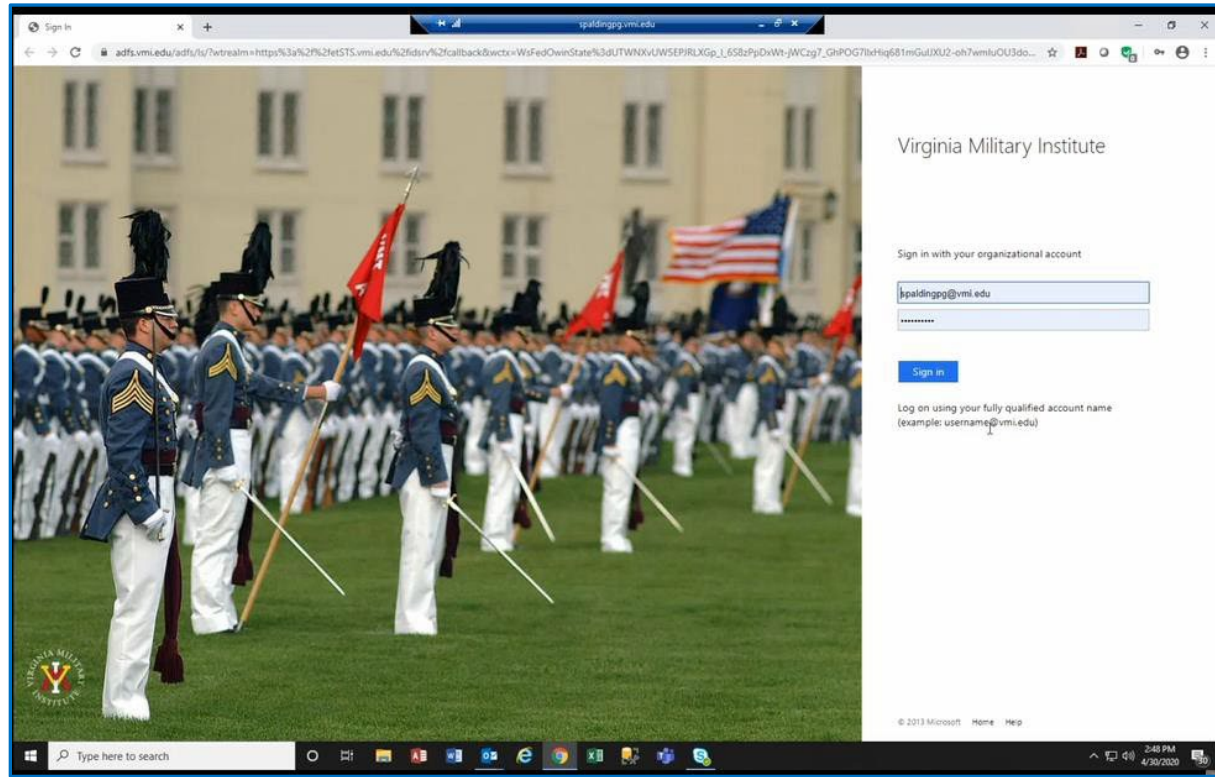
Cadet Ryan,

You have a balance due of **1020.00** for first session summer school. Please pay the amount in full in Post View , or click on the link below to electronically route your Tuition Due Promissory Note to Cadet Accounting.

<https://etcentral.vmi.edu/#/form/189>



# Log into Etrieve



- Log into Etrieve via the link using your VMI username and password
- Click on Forms > then under Finance and Budget you will see the various VMI notes.
- Only complete those your email indicated

Promissory Note - Loan (CMP15)

Promissory Note - Payment Plan Annual (CMP16)

Promissory Note - Payment Plan Fall (CMP17)

Promissory Note - ROTC (CMP14)

Promissory Note - Tuition (CMP13)



# Completing Promissory Note

- The academic term and year have drop downs to choose the correct time frame
- The email you were sent indicated the amount for your balance due to enter
- If you have outside awards and/or other aid coming you can enter a different amount
- If you do not enter the full **amount** write a description of why as indicated
- If you have documentation of additional aid you can attach to the promissory note

VIRGINIA MILITARY INSTITUTE

## Promissory Note

Tuition

Name	ID	Date
[REDACTED]	[REDACTED]	5/4/2020

Academic Term	Year	Term - YY	Promissory Note Payment Due Date:
S120	2019-2020	<ul style="list-style-type: none"><li>S1-Summer1 Session</li><li>S2-Summer2 Session</li><li>FL- Fall Term</li><li>SP-Spring Term</li></ul>	<ul style="list-style-type: none"><li>Summer 1 - 15 June</li><li>Summer 2 - 15 July</li><li>Fall - 15 October</li><li>Spring - 15 March</li></ul>

Note: Original payment due date for Fall is 1 August, Spring is 15 December. Refer to the [Summer Session Catalogue](#) for Summer Session payment due dates.

Promissory Amount

\$ 500.00

If you did not enter the full balance due amount, as emailed to you by Cadet Accounting, please explain below how the remainder will be paid.

I will be receiving a scholarship from the Rotary Club for \$1500.00. I will attach the award letter.



# Completing Promissory Note (PN)

The maker and guarantor (if maker is under eighteen years of age), for value received, hereby promise and agree to pay to the order of the Virginia Military Institute (the holder) at its office in Lexington, Virginia, the Promissory Amount on or before the due date as referenced above, or at such time before then as the maker may separate from the Virginia Military Institute, either voluntarily or as provided in the Virginia Military Institute's regulations which are published in [The Blue Book](#) incorporated herein by reference.

Homestead and all other exemptions, presentment, demand, protest and notice of dishonor are hereby waived by the maker and guarantor.

The maker and guarantor agree that the debt shall bear interest on its outstanding unpaid balance at the rate of 6% per annum from the original due date of this debt. In the event of default, the maker and guarantor agree to pay all costs of collection including attorneys' fees of 30% of the total outstanding balance.

**Default**, as used herein, shall mean the failure of the maker and guarantor agree to pay the debt on the due date or upon earlier separation from the Virginia Military Institute, as hereinabove stated.

We, the maker and guarantor, understand and acknowledge that in the event of default, the maker (cadet) shall not be allowed to register and enroll for any future semester or session at the Virginia Military Institute until such default has been remedied.

We, the maker and guarantor, understand that pursuant to [Virginia Code 59.1-485](#) and [17.1-258.4](#) or other applicable Virginia Code sections, electronic signatures used to execute this Promissory Note are legally effective and enforceable as original signatures.

Should any one or more of the following foregoing provisions be found to be unlawful or void by a court of competent jurisdiction, then the remaining provisions shall be deemed to be severable and remain in effect.

I Agree to the terms above  Check this box if you are under 18

## DOCUMENT SUBMISSION INFORMATION

Electronic submissions of this form and related fields are created by VMI as a handwritten signature on a paper form and are captured as part of the official history of the submission.

- This form must be completed in full or it will be returned to the originator.
- To add comments (Approvers only), click **History** before you click Approve or Decline.
- Add any required attachments before you click Submit.



Submit



Attachments



Download



Print

- After reading the promissory note click in the box agreeing to the terms
- If you are over 18 you can complete the PN
- If you have proof of outside awards, click the attachments to upload documentation
- Click submit
- You will receive an email from [Etrieve@vmi.edu](mailto:Etrieve@vmi.edu) when cadet accounting has processed the PN and/or you can view in etrieve
- If the PN is incorrect we will make notes under history as to why it is incorrect. We will route the note back to you via email from [Etrieve@vmi.edu](mailto:Etrieve@vmi.edu). You can look in Etrieve under history with comments explaining the error. A new PN must be completed
- If you are over 18 your PN is complete
- If you are under 18 view next slide



# Completing Promissory Note

- If you are under 18 obtain an adult/guarantor signature
- Check the box to open the parental section of the PN
- Once completed by adult/guarantor the document can be scanned and attached to the original PN as an attachment or mailed to VMI

\* I Agree to the terms above  Check this box if you are under 18

- As a minor, you must print this form and obtain an adult guarantor's signature
- Once signed, scan and attach the document using the Attachment option below
- If you are unable to do so, you must check the following box and mail an original to the address provided.

I am mailing this signed document to Cadet Accounting

**Note: If mailing this document, you still need to click Submit at the bottom of your screen to notify Cadet Accounting your intentions.**

Cadet Accounting  
310 Smith Hall  
Virginia Military Institute  
Lexington, VA 24450

Guarantor:

Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
\_\_\_\_\_  
Printed Name: \_\_\_\_\_  
Relationship to cadet: \_\_\_\_\_  
Address: \_\_\_\_\_  
City, State, Zip: \_\_\_\_\_  
Phone: \_\_\_\_\_

**DOCUMENT SUBMISSION INFORMATION**

Electronic submissions of this form and related fields are treated by VMI as a handwritten signature on a paper form and are captured as part of the official history of the submission.

- This form must be completed in full or it will be returned to the originator.
- To add comments (Approvers only), click **History** before you click Approve or Decline.
- Add any required attachments before you click Submit.

Submit Attachments Download Print





# Contact Information

- Additional information concerning your bill and payment options can be found on our website [www.vmi.edu/cadetaccounting](http://www.vmi.edu/cadetaccounting).

Cadet Accounting Office 540-464-7217

Email: **cadetaccounting@vmi.edu**