Electronic Billing & Documentation

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

- 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

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
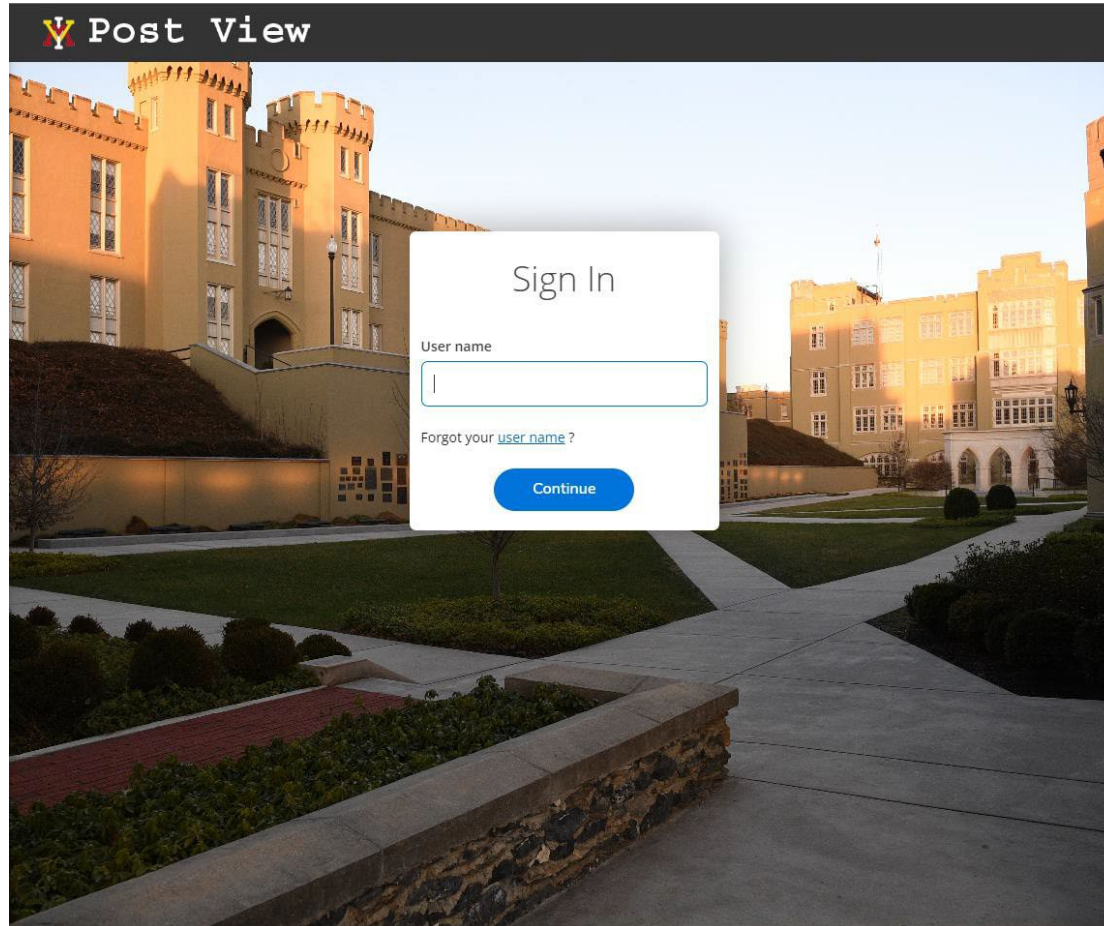
- Proxy users will then need to enter their assigned "User name" on this screen.

- The User name is sent by email after the cadet designates Proxy Access.

Proxy User Sign In
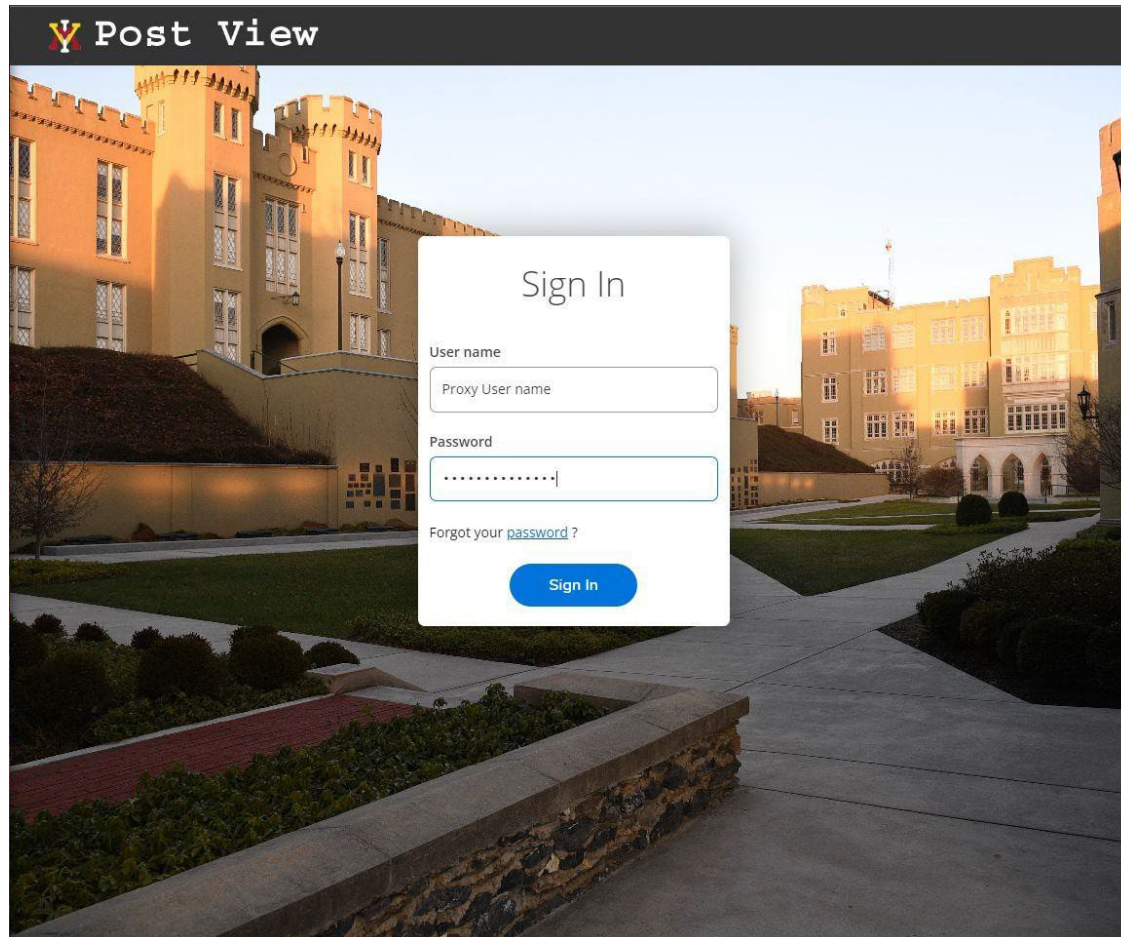
- You will then be requested to supply your password on this page.

- 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

smithjd27@vmi.edu

••••••••••

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.

© 2018 Microsoft   Home   Help

- 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

Post View processes

• 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

Student Finance
Here you can view your latest statement and make a payment online.
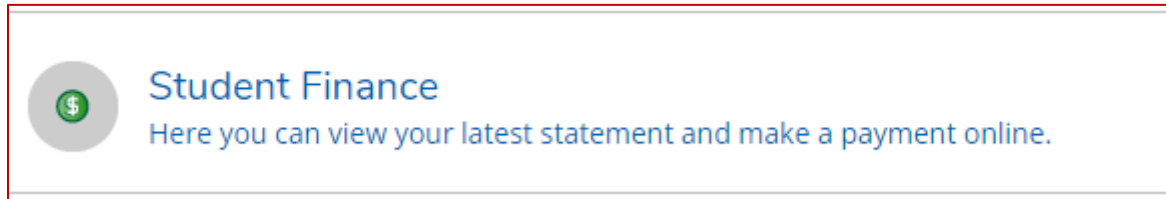
➢ Choose the appropriate semester

Total Account Balance

Spring 2022

Fall, 2021
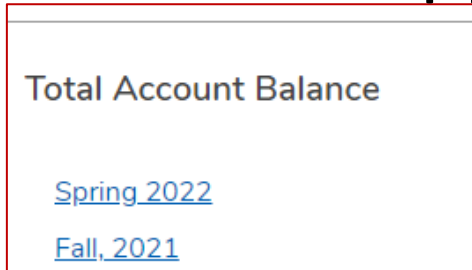
➢ Top right corner click "view statement"
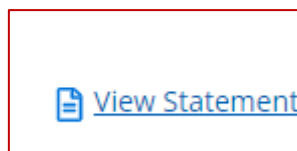
📄 View Statement

Sample Statement

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

Name	
Student ID	
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
+	**Total Charges**	**$29,343.00**
-	**Financial Aid**	**$29,343.00**
=	**Spring 2022 Balance**	**$0.00**
=	**Total Amount Due**	**$0.00**
	Total Balance	**$0.00**

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
Total Amount Due	**$0.00**

Go to Account Summary

- Click on Make a Payment

Total Amount Due	$0.00	Make a Payment

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

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

Adding a Proxy

- 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

- 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

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

- 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 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

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 PostViewWhen 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)
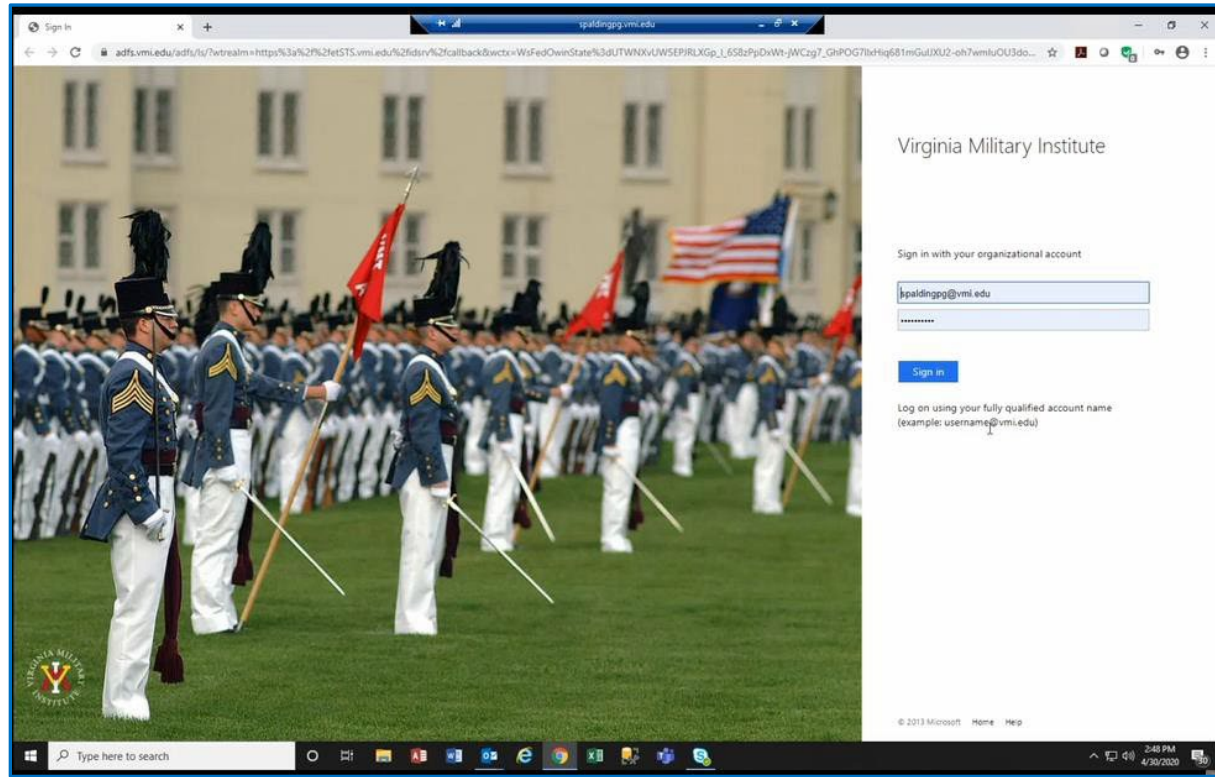- Click the link in the email to sign the promissory note using Etrieve

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**

5/4/2020

Academic Term   **Year**

S120   2019-2020

Term - YY
- S1-Summer1 Session
- S2-Summer2 Session
- FL- Fall Term
- SP-Spring Term

Promissory Note Payment Due Date:
- Summer 1 - 15 June
- Summer 2 -15 July
- Fall - 15 October
- Spring - 15 March

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)

- 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 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. 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

Contact Information

- Additional information concerning your bill and payment options can be found on our website www.vmi.edu/cadetaccounting.

Cadet Accounting Office 540-464-7217

Email: **cadetaccounting@vmi.edu**