

# Electronic Billing & Documentation



## Cadet Accounting

22 July 2022



## IMPORTANT NOTES



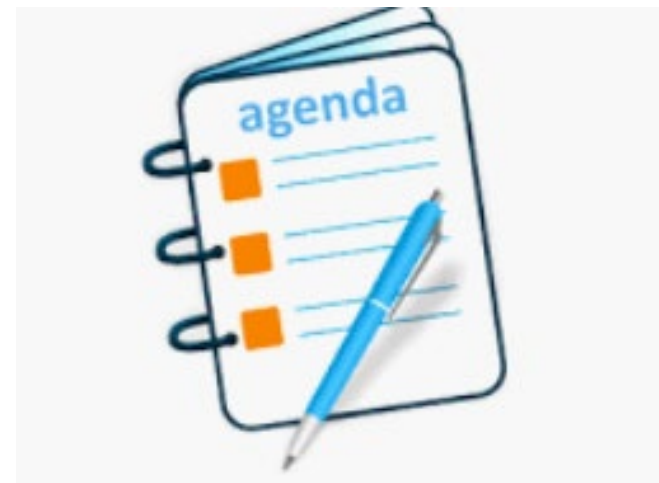
Cadets will need to set up Proxy Users in the new PostView system. Proxy users have replaced the authorized bill payer that was used in the old PostView system. Once cadets have assigned credentials, the new user will receive their username and password in two separate emails. See Page 13 for Proxy User Instructions.

Also: When logging into PostView you will have an option to choose yourself or your cadet. Please make sure to choose YOUR CADET.



# 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/comptroller/cadet-accounting/>



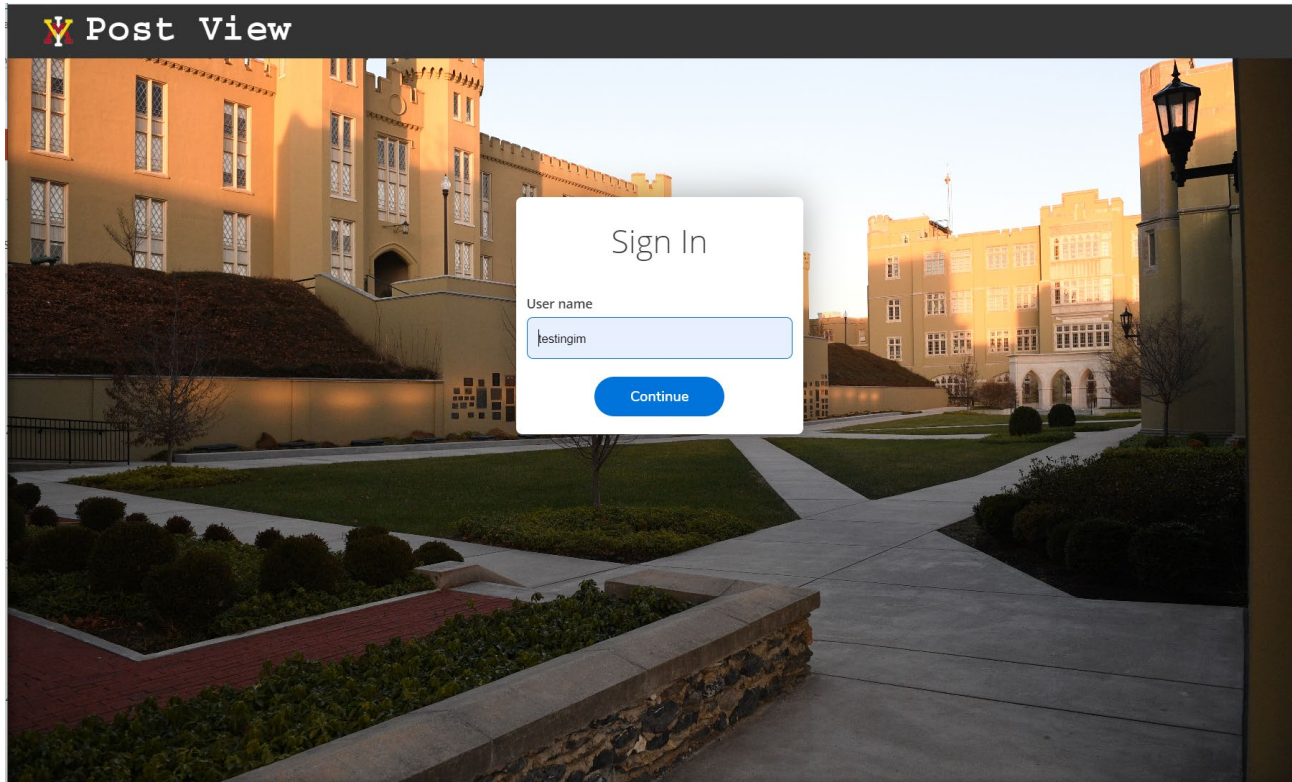
# Logging into Post View

A screenshot of the Virginia Military Institute website. The top navigation bar includes buttons for 'Inquire', 'Visit', and 'Apply', along with links for 'MYVMI', 'OFFICES A-Z', 'CALENDAR', 'WEBCAMS', and 'DIRECTORY'. Below this is a search bar and a secondary navigation menu with links for 'About', 'Academics', 'Admissions and Aid', 'Cadet Life', 'Athletics', and 'Give'. The main content area features a large image of three cadets in uniform standing in front of a red fire truck. To the right of the image is a text box with the heading 'Cadet EMTs Provide Comfort and Care' and a paragraph describing their role as Emergency Medical Technicians (EMTs) on post.

- 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



# Sign In



Enter your user name and the system will request a password (proxy users only) or take you to the proper authentication page



# Authentication page



Virginia Military Institute

Sign in

Sign in

**Faculty:** Log on with your fully qualified account name including @vmi.edu

**Cadets:** Log on with your VMI email address as the username and your PostView/Canvas password.

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- Enter “user name” followed by @mail.vmi.edu
- Enter your VMI Network password – this may not be the same as your email password



# Post View processes

The screenshot shows the 'Post View' dashboard for a user named 'testingim'. The dashboard includes a navigation sidebar on the left, a header with the user's name and 'Sign out'/'Help' options, and a main content area. The main content area features a 'Notifications' section with a table showing one notification: 'Documents Required' with a link to 'View required documents'. Below this are several tiles for different services: Student Finance, Financial Aid, Tax Information, Employee, Student Planning, Course Catalog, Grades, Program Evaluation and Graduation, Academic Attendance, and Cadet. Each tile provides a brief description of the service.

Title	Details	Link
Documents Required	There are 1 requests from your institution that require your action.	<a href="#">View required documents</a>

- Student Finance**: Here you can view your latest statement and make a payment online.
- Financial Aid**: Here you can access financial aid data, forms, etc.
- Tax Information**: Here you can change your consent for e-delivery of tax information.
- Employee**: Here you can view your tax form consents, earnings statements, banking information, timecards and leave balances.
- Student Planning**: Here you can search for courses, plan your terms, and schedule & register your course sections.
- Course Catalog**: Here you can view and search the course catalog.
- Grades**: Here you can view your grades by term.
- Program Evaluation and Graduation**: Here you can view and submit a graduation application.
- Academic Attendance**: Here you can view your attendances by term.
- Cadet**: Here you can view cadet specific options.

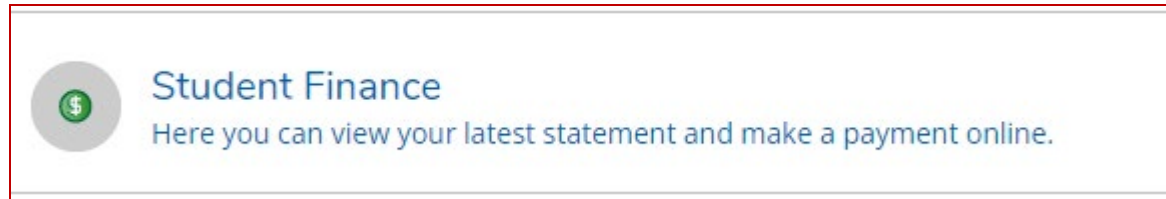
- Select the Student Finance tile to review account activity and to review your bill



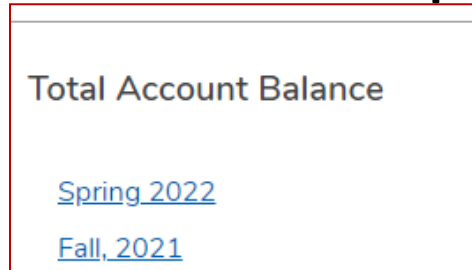


# To view your bill, click on **Student Finance**

➤ 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



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
<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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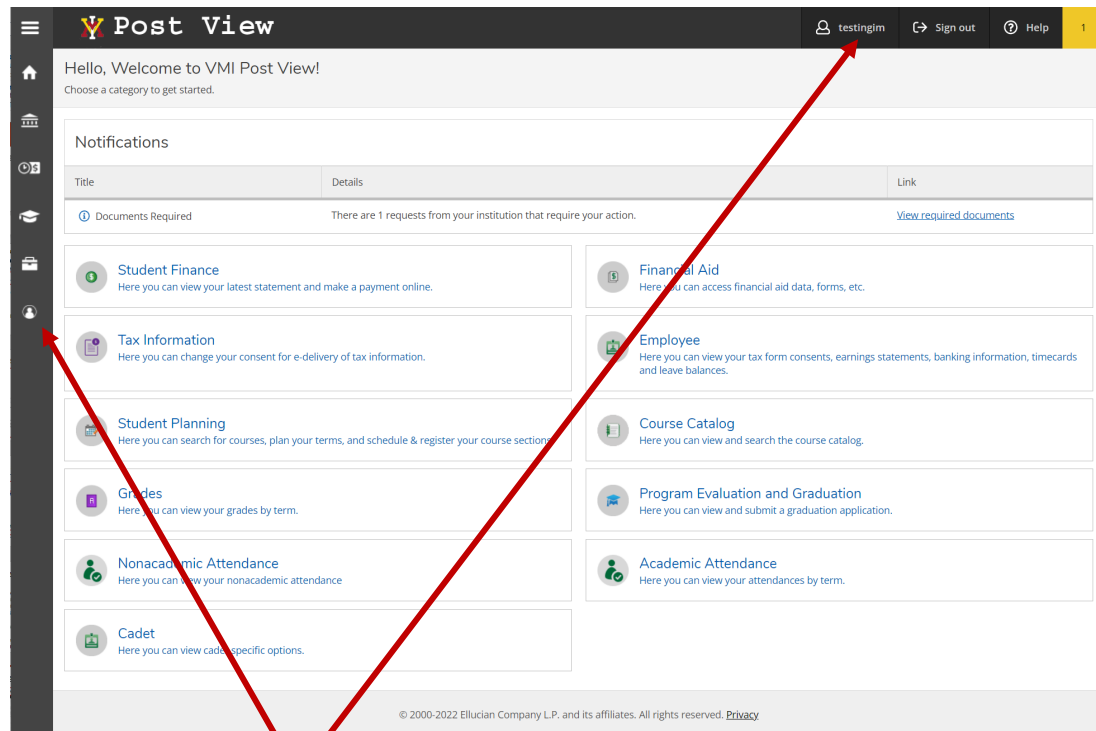
# Protecting your User ID

- 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

Cadet will log onto Post View Self Service using login and password

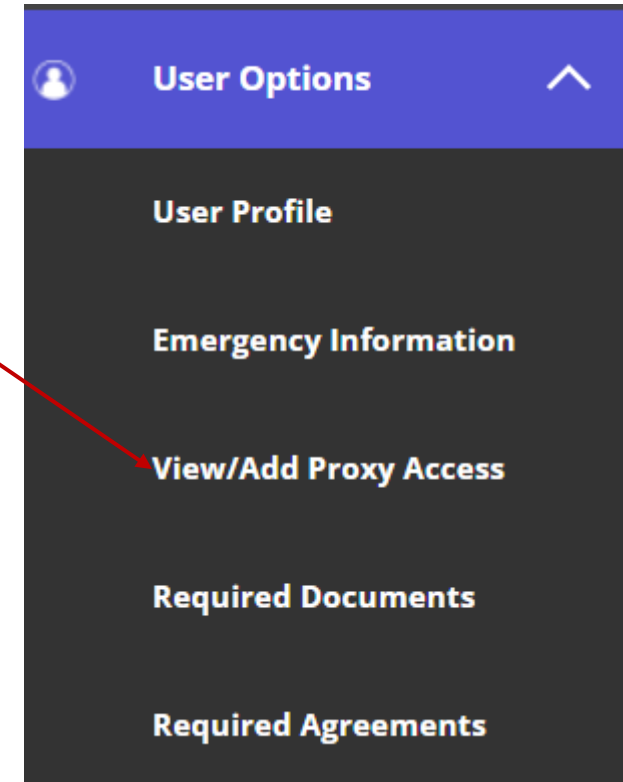


- Click on the user options for a drop-down menu



# Adding a Proxy

- Click on “view/add proxy access
- To add a proxy cadets must have:
  - Person’s name
  - Current address
  - Type of relationship
  - Current email address





# Adding a Proxy

- The first paragraph explains the proxy user process

## View/Add Proxy Access

**\*\*\*\*\* Proxy User Access \*\*\*\*\***


Proxy Users have the ability to interact with the Virginia Military Institute Post View system as you. Only users with a Virginia Military Institute documented personal relationship can be designated as a Proxy User. Required documentation includes the person's name, current address, type of relationship and current email address. Users with these relationships may be enabled to allow access to review your Student Finance Information including Account Activity, Make A Payment, Tax Information, General Notifications, Academics, and Financial Aid information. You will be able to select which of the available information you share on a per user basis.

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



# Reviewing Active Proxy

The next section will show active proxy

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

- Cadets can click the pencil to edit and review proxy details

### Edit Proxy Details

Name: [Redacted]



Email Address: [Redacted] 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 drop down “select a proxy”
- If you wish to add a proxy, use the link to add a proxy. Cadets will complete a form and cadet accounting will enter the information. Allow 48 hours for the person to be added.
- Cadets will receive an email when proxy information has been added into the system
- Log back into post view, select add a proxy and give them permissions
- The proxy will receive one email with username and another email with password.



# Example Proxy Options

[Redacted] ▾

Email Address: [Redacted] Relationship: Brother

Access

Allow Complete Access

Allow Select Access

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

- Once you have chosen the proxy options read the disclosure below, check the box and click save. This will prompt the emails to the proxy.
- 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 Treasurer
  - 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 FERPA & e-Commerce Form in Etrieve
- Required prior to registration
- Completed annually



# e-Commerce Release

Cadets must provide voluntary consent to participate in electronic transactions for all financial information. Including but not limited to loan authorizations and notifications.

- Opt in – to receive email and electronic notification
- Complete as part of FERPA authorization



# To access FERPA/e-Commerce

- An Ecommerce-FERPA hold is placed on cadets accounts each fall
- Cadets will receive an email annually with a link to an retrieve FERPA form
- Once the form is completed the hold will be removed within 24 hours allowing cadets to register
- When a family member calls or visits cadet accounting or financial aid the FERPA form will be checked to confirm you have authorized 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

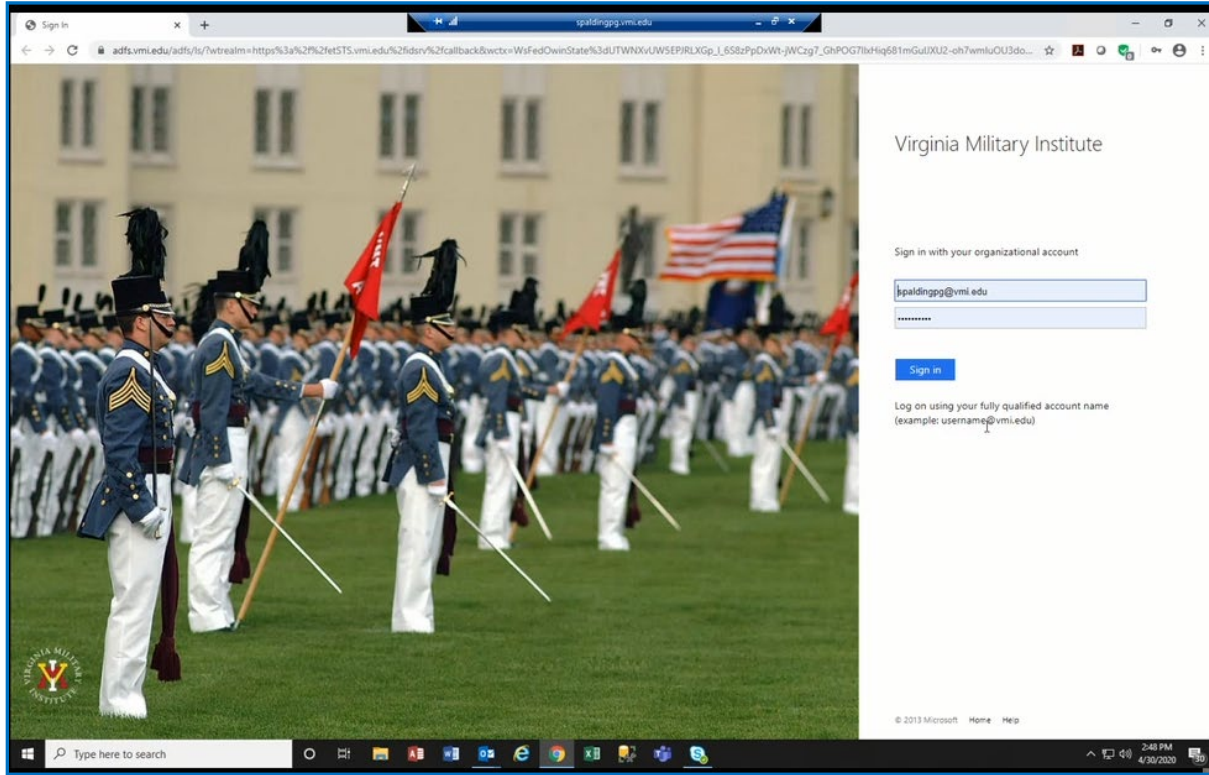
Cadet Ryan,

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 comptroller 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.



- 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
- Even if you plan to mail the promissory note you must submit the form to capture the cadet's signature
- 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: \_\_\_\_\_

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- 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**