SRFS ‘Must Do’ List

Note: To complete this list, login to Penn InTouch, at www.upenn.edu/pennintouch, using your secure PennKey and password. Penn InTouch is your secure gateway to academic, financial and biographical information.

☐ Provide your EMERGENCY CONTACT information
Penn’s Division of Public Safety encourages you to provide personal emergency contact information for use with the U.PennAlert Emergency Notification System & Penn Guardian. Provide a phone number (preferably a cell phone) where you can best be reached. Also register parents or guardians, so University officials can communicate with them as well.

Register for U.PennAlert: From Penn InTouch select Profile, privacy & emergency, then Emergency.
Register for Penn Guardian at: http://www.publicsafety.upenn.edu/pennguardian/

☐ Setup Penn Pay Users and Payment Accounts for your Student Bills
Penn Pay is Penn’s online billing and payment system that you can access with your Penn Key. To enable others (such as your parents) to also receive and/or pay your bill, and view new activity, you must ‘invite’ them as an ‘other payer’ after you log in.

From Penn InTouch, select Student Billing Account, then Paying Your Bill/Penn Pay.

☐ Sign up for DIRECT DEPOSIT of your Student Account Refund(s) and Payroll
Enroll in direct deposit, as you may receive wages from a work-study job, other campus employment, or receive a student account refund or other reimbursements. Direct deposit ensures your funds will be deposited to your personal US bank account. Enroll as soon as possible, using a bank local to Penn, or one of your own choosing (the University will accept only one direct deposit account per student).

From Penn InTouch, select Student Billing Account, then Enroll in Direct Deposit.

☐ Give Permission to Share Academic and/or Financial Information
By federal law (FERPA), the University generally cannot discuss your academic or financial records with a third party, including your parents. To authorize Penn to share academic and/or financial data with a parent, guardian, sponsor or other third party, you must designate them explicitly.

From Penn InTouch, select Profile, privacy & emergency, then Share Academic/Financial Information.

☐ Submit your valid social security number to Student Financial Services, if you have not done so already.
The University is required by law to collect and submit your valid social security number to the Internal Revenue Service when transmitting financial data on IRS Form 1098T. If you have not yet submitted your social security number and name as it appears on Social Security Administration’s records, and you are a U.S. citizen or permanent resident, you must complete a Form W-9S and return it to Student Financial Services.

Questions & Contact Information

If you have a question regarding a specific charge, please contact the responsible department below.

Bookstore (BKSTR)
upenn@bkstore.com
215-898-7595

Computer Connection (COMPCON)
cxmail@exchange.upenn.edu
215-898-5282

Dining Services (DINING)
dining@upenn.edu
215-898-3547

Fraternity/Sorority Affairs (FRAT/SOR)
office@pobox.upenn.edu
215-898-5283

Health Insurance (INSUR)
shinsur@pobox.upenn.edu
215-746-3535

Housing Assignments/ Services (HOUSING)
living@exchange.upenn.edu
215-898-3547

Student Health Services (HEALTH)
shs@pobox.upenn.edu
215-746-3535

ISC Networking & Telecommunications (I.S.C.)
service-requests@isc.upenn.edu
215-746-6000

Wharton Printing
servewr@wharton.upenn.edu

For general questions about your bill that are not specific to the departments listed above, please contact Student Financial Services (SFS) at 215-898-1988, email sfsmail@exchange.upenn.edu or, askBEN 24/7, at www.sfs.upenn.edu.

Important Items to Remember

The initial Fall Term bill is due on July 29th. The Spring Term bill is sent December 2 and is due January 8, 2016. Monthly bills are also produced as other charges, such as bookstore or dining retail purchases, are incurred. The annual billing schedule can be found on the SFS website at www.sfs.upenn.edu/billing.

The University must receive the amount due in full on or before the due date. If full payment is not received by the due date, a late payment penalty of 1.5% of the past due amount per month will be assessed, and future registration and continuing enrollment will be jeopardized.

If Penn accepts payments that contain or reflect “paid in full,” or other restrictive endorsements, Penn does not lose any of its rights to collect any amount due.

Please note that the University does not accept post-dated checks.
**PAYING YOUR BILL**

- **Online through ACH**
  Use Penn Pay to schedule both the payment date and amount from your U.S. checking or savings account.

- **Online with an American Express Card**
  Use Penn Pay and pay with your American Express Card. A 2% convenience fee will be assessed and will appear on your American Express billing statement. Note that Penn does not receive any compensation or portion of the convenience fee for providing American Express as a payment option.

- **Check**
  Pay from a U.S. checking or savings account and make your check payable to “The Trustees of the University of Pennsylvania”. Payment coupons must accompany your payment. Use the coupon on your billing statement, or print one from Penn Pay.

- **Wire Transfer**
  See the SFS website for instructions.

**RECEIVING YOUR BILL**

- **New Students**
  New students will receive paper billing statements for July and August at the street address we have on record. Billing statements will also be sent to your University e-mail address, if it has been set up, and to any other e-mail addresses you provide on Penn Pay. Beginning in September, only e-bills will be delivered.

- **Currently Enrolled Students**
  Pen will notify you at your University e-mail address and to any other e-mail address you provided on Penn Pay, when your monthly bill is ready for viewing.

**BILLING STATEMENT TIPS**

- **New charges and credits are displayed with an asterisk**.
- **Previously billed items** that are similar may be combined as a single line item.
- **Temporary/Pending credits**
  As a convenience to you, Penn will apply a temporary credit to your student billing account for certain funds that we know are pending and have not yet been received. Temporary credits may be issued for the Federal Direct Loan, the Federal Direct Plus Loan, alternative loans, Pell Grants, state grants and the Penn Monthly Budget Plan. Temporary credits will be removed on the date indicated on your statement, or earlier, as the actual payments are received and credited to your student billing account.

**Your Student Billing Statement**

- **Transactions in the current academic year section are grouped by term**.
- **New transactions, not previously billed, are indicated by an **.** Previously billed similar transactions with multiple entries (i.e. bookstore, telephone) will be netted and displayed on one line.

**TIPS**

- **All personal payments** (mail via cash, check, Penn Pay, or wire transfer, made via cash, check, etc.) must be mailed to the University Cashier in the lobby of the Franklin Building, 3451 Walnut Street. Payment coupons are attached to your Statement of Account. Present your payment coupon and payment to the University Cashier in the lobby of the Franklin Building, 3451 Walnut Street. Payment coupons are attached to the bottom of your billing statement, or print one from Penn Pay.

**Your Student Billing Account Information**

**Your Student Billing Account** is the central repository for charges and credits related to your enrollment at Penn. Charges can include tuition, mandatory and other fees, campus housing, Penn Dining, bookstore purchases, etc. Credits can include financial aid, federal or private loans, and personal payments.

To help your billing process go smoothly, please take a few minutes to read this booklet, and activate the ‘MUST DO List’, on page 5.

**PENN.PAY**

Penn Pay is Penn’s online billing system through which you receive your monthly student account bill. You can also review new activity on a daily basis, and opt to pay your bills online, securely and efficiently. In order for your parents, or others, to access Penn Pay, you must invite them to your account.

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