

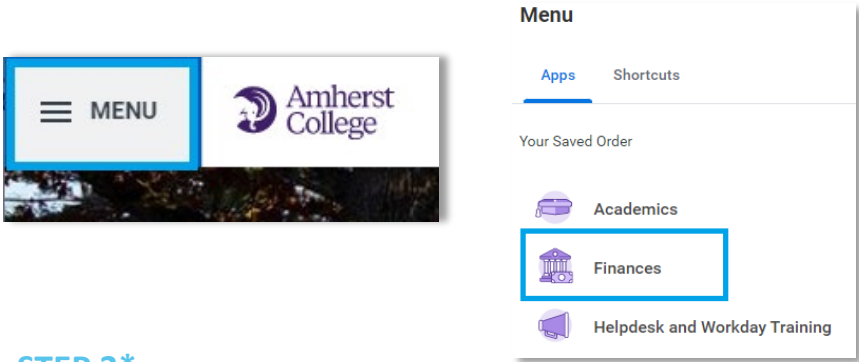
# Student Guide to Navigating the Finances App in Workday



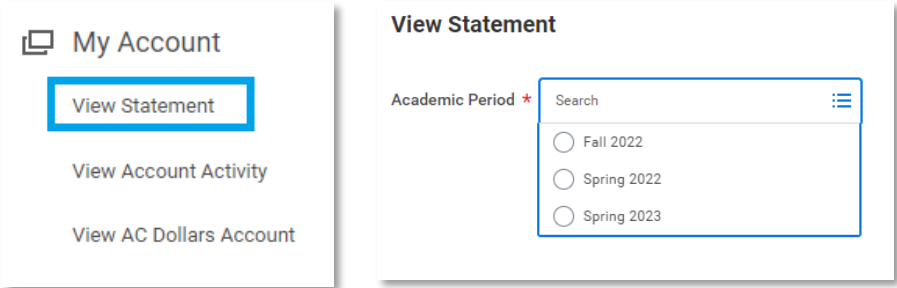
Instructions for Students to navigate the Finances App in Workday to view balances, generate statements, make payments, submit insurance waivers and access the 1098-T tax form.

**STEP 1** Log into [Workday](#).

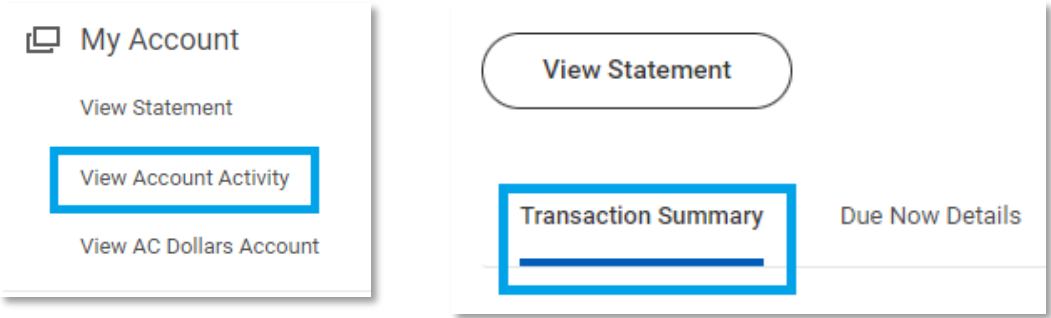
**STEP 2**  
Navigate to the Menu and select *Finances*.



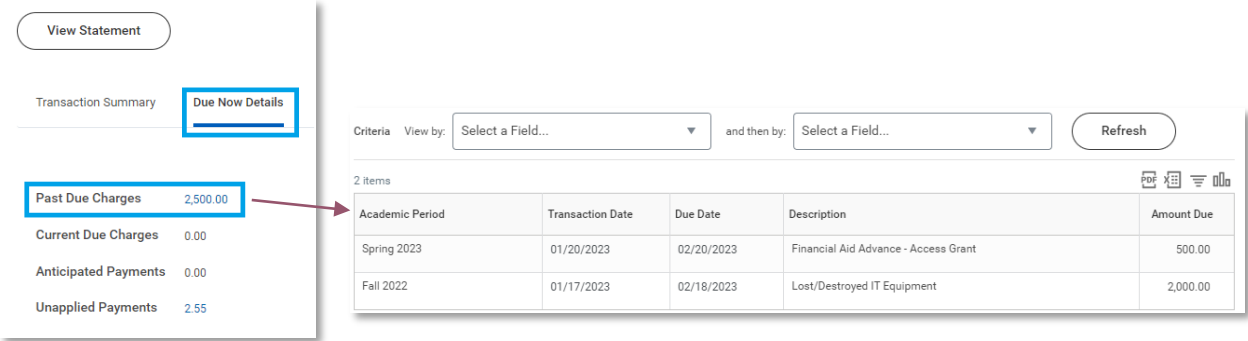
**STEP 3\***  
My Account: *View Statement* allows a specific term to be selected to view all related activity. The **Generate PDF** button creates a printable version. Statement view will only show current term balance details. \*See page 4 for more details.



**STEP 4**  
My Account: *View Account Activity* will allow you to see a *Transaction Summary* of ALL account transactions regardless of term.



**STEP 5**  
*Due Now Details* will allow you to see Past Due Charges, Current Due Charges, and Anticipated Payments regardless of term by clicking the blue dollar value. A pop up box will appear listing the individual charges that make up the total amount.



# Student Guide to Navigating the Finances App in Workday



## STEP 6

Payment Links: *Make a Payment Through Nelnet* will bring you to the One Time Payment option. The current balance will be the combined sum of all term balances due. Click the *Make a Payment* box to proceed.

Payment Links

Make a Payment Through Nelnet

Enroll in Nelnet Payment Plan

Deposit Funds to AC Dollars

Hello

Payment Activity

View Details

Current Balance \$85.00 Transaction Details

Make a Payment

SPRING 2023	AMOUNT DUE
Current Charges	\$50.00
FALL 2022	AMOUNT DUE
Current Charges	\$35.00

Check the box for each of the charges to pay and click *Next-Payment Method*. This brings you to the screen to enter the credit/debit card\* (additional fees apply) or checking/savings account (no additional fees).

Make A Payment

1

2

3

Select A PaymentPayment MethodReceipt

Want to designate another payer?

Select Accounts to Pay

ACCOUNT	TERM	CURRENT BALANCE	PAYMENT AMOUNT
<input checked="" type="checkbox"/> Student Account Balance	Spring 2023	\$50.00	\$ 50.00
<input type="checkbox"/> Student Account Balance	Fall 2022	\$35.00	\$ Enter Amount

PAYMENT AMOUNT \$50.00

Cancel

Next - Payment Method

## STEP 7

Payment Links: *Enroll in a Nelnet Payment Plan* brings you to Nelnet. Click *Set Up a Payment Plan* and follow the prompts through the “Thank You” screen. Click *Add an Authorized Party* to give delegate access to a parent to create a plan on your behalf.

Payment Links

Make a Payment Through Nelnet

Enroll in Nelnet Payment Plan

Deposit Funds to AC Dollars

Hello Norman

Payment Plan & Billing

View Details

Norman Nelnet ID: 5003896

Current Balance \$58,943.38 Transaction Details

Make a Payment

FALL 2021

Current Charges

AMOUNT DUE \$19,071.69

Set up a Payment Plan

SPRING 2022

Current Charges

AMOUNT DUE \$39,871.69

Norman Nelnet

Two e-mail addresses on file

Register to receive text services on your mobile phone.

Three Financial Accounts on file

Two Authorized Parties on your account. Add an Authorized Party.

## STEP 8

Payment Links: *Deposit Funds to AC Dollars* will bring you to the GET Funds site where you can electronically load funds to your AC Dollar account. Select the *Click here to login* link.

Payment Links

Make a Payment Through Nelnet

Make a Payment to Your Nelnet Payment Plan

Make a Payment Through Flywire

Deposit Funds to AC Dollars

AC DOLLAR\$ DEPOSITS

Due to a recent update to our system, please re-enter any stored credit card that you had previously saved. We apologize for this inconvenience and appreciate your understanding.

Welcome to the AC Dollar\$ Deposits system (sometimes referred to as GET Funds).

This system allows students to deposit funds into their AC Dollar\$ accounts using a credit card or to E-mail a request for funds to their parents, friends or family.

Parents, friends, or family may also use this system to deposit funds into a student's AC Dollar\$ account. (The student's last name and 9-digit ID card number is required.)

(Note that this deposit service is intended only for students and should not be used by faculty or staff.)

Login to AC Dollar\$ Deposits with your Amherst username and password:

Click here to login

Family and Friends (no login required):

Click Here to Deposit into a Student's AC Dollar\$ Account

How does AC Dollar\$ Deposits work?

Find out more about AC Dollar\$ Deposits here.

# Student Guide to Navigating the Finances App in Workday



## STEP 9

Insurance Waivers: *Waive/Enroll in Health Insurance Plan* will bring you to the Gallagher Student Health website. Under the Plan Summary box, select WAIVE to complete a waiver prior to the published deadline.

Insurance Waivers

Waive/Enroll in Health Insurance Plan

Waive Tuition Insurance

Plan Summary

Carrier Name: Blue Cross Blue Shield of Massachusetts

Eligible students are automatically enrolled unless a waiver form is submitted. Select 'WAIVE' to complete a waiver before the published deadline. Select 'ENROLL' to enroll your dependent(s) by the published deadline.

LOG IN

Insurance Waivers: *Waive Tuition Insurance* will bring you to the Amherst College: Tuition Insurance Waiver Form via Google Forms. Students must access this with your Amherst College email address.

Insurance Waivers

Waive/Enroll in Health Insurance Plan

Waive Tuition Insurance

Amherst College: Tuition Insurance Waiver Form

By completing this form you are agreeing that you do not want to participate in the tuition insurance offered by A.W.G Dewar Inc.

Once the waiver agreement has been submitted, your student account statement will be credited the cost of tuition insurance in 1-2 business days.

This form is automatically collecting emails for Amherst College users. [Change settings](#)

**\*\*IMPORTANT-** Unless the waivers are submitted by the posted deadline on the Student Accounts webpage, you will be enrolled in the plan(s) and the premium(s) will be due in full.

## STEP 10

Other Financial Links: *Financial Aid Portal* brings you to the Amherst College Online Financial Aid System where you can submit an aid application or view your award documents and history.

*Finexio* brings you to their main login page. This is a third party vendor the College partners with to send non-Payroll related payments such as refunds and prizes to students.

Other Financial Links

Financial Aid Portal

Finexio

## STEP 11

Student Account Tax Information: *Manage Paperless 1098-T* allows you to choose NOT to have a paper copy mailed for the tax year. (Complete each year in January) *Print My 1098-T* allows you to print a copy for your records or save a PDF version to be electronically sent to the person who can claim you as a dependent.

*View My 1098-T* lists the information and includes explanations on the box values.

Student Account Tax Information

Manage Paperless 1098-T

Print My 1098-T


View My 1098-T

# Student Guide to Navigating the Finances App in Workday



## \*STEP 3- Additional Information

Prior term balance details must be viewed on the corresponding term statement. Prior term past due balances will show in the past due total on both the related term and the current term statements. Prior term Non-past due balances will NOT show at all on a statement that is not specific to the term.



Student Name

STATEMENT OF STUDENT ACCOUNT

Remit To:

Amherst College  
Office of the Controller  
PO Box 5000  
Amherst, MA 01002-5000  
United States of America

Statement Date:

February 10, 2023

Student ID

Past Due:

\$47.00

Current Semester Balance:

\$47.00

PLEASE MAKE CHECKS PAYABLE TO: Amherst College

PAYMENT TERMS: Due Upon Receipt

ONLINE PAYMENT: [www.amherst.edu/go/payment](http://www.amherst.edu/go/payment)

QUESTIONS: 413-542-2817

studentaccounts@amherst.edu

CURRENT PERIOD ACCOUNT ACTIVITY

Fall 2022

Transaction Date	Due Date	Description	Charges	Credits
Statement Charges				
07/08/2022	08/05/2022	Health Insurance (Waivable)	2,759.00	
07/08/2022	08/05/2022	Room	4,525.00	
07/08/2022	08/05/2022	Tuition	31,750.00	
07/08/2022	08/05/2022	Tuition Insurance (Waivable)	120.00	
07/08/2022	08/05/2022	Transcript Fee	25.00	
07/08/2022	08/05/2022	Board	3,850.00	
07/08/2022	08/05/2022	Student Activities	300.00	
01/06/2023	02/06/2023	Missing Athletic Equipment	47.00	
Total Statement Charges			\$43,376.00	
09/27/2022		Financial Aid / Payments (Disbursed and Applied)		43,329.00
Wire - Flywire				
Total Student Payments				\$43,329.00

Explanation of Terms:

**Past Due:** The past due balance consists of all charges past its due date regardless of the academic period it relates to.

**Current Semester Balance:** The current semester balance consists of all outstanding charges in the current period. This includes past due charges, current due charges, and future due charges within the same academic period the statement was run for. The current term balance does consider pending financial aid and anticipated payments. If the anticipated financial aid and/or anticipated payments result in a credit balance, the current term balance will be reflected as \$0. Once anticipated financial aid and/or anticipated payments are disbursed/received, a credit balance will be shown at that time.


Statement Summary

Past Due:

\$47.00

Current Semester Balance:

\$47.00



Student Name

STATEMENT OF STUDENT ACCOUNT

Remit To:

Amherst College  
Office of the Controller  
PO Box 5000  
Amherst, MA 01002-5000  
United States of America

Statement Date:

February 10, 2023

Student ID

Past Due:

\$40,575.00

Current Semester Balance:

\$40,545.00

PLEASE MAKE CHECKS PAYABLE TO: Amherst College

PAYMENT TERMS: Due Upon Receipt

ONLINE PAYMENT: [www.amherst.edu/go/payment](http://www.amherst.edu/go/payment)

QUESTIONS: 413-542-2817

studentaccounts@amherst.edu

CURRENT PERIOD ACCOUNT ACTIVITY

Spring 2023

Transaction Date	Due Date	Description	Charges	Credits
Statement Charges				
12/06/2022	01/06/2023	Tuition Insurance (Waivable)	120.00	
12/06/2022	01/06/2023	Tuition	31,750.00	
12/06/2022	01/06/2023	Room	4,525.00	
12/06/2022	01/06/2023	Board	3,850.00	
12/06/2022	01/06/2023	Student Activities	300.00	
Total Statement Charges			\$40,545.00	
Financial Aid / Payments (Disbursed and Applied)				
Total Student Payments				

Explanation of Terms:

**Past Due:** The past due balance consists of all charges past its due date regardless of the academic period it relates to.

**Current Semester Balance:** The current semester balance consists of all outstanding charges in the current period. This includes past due charges, current due charges, and future due charges within the same academic period the statement was run for. The current term balance does consider pending financial aid and anticipated payments. If the anticipated financial aid and/or anticipated payments result in a credit balance, the current term balance will be reflected as \$0. Once anticipated financial aid and/or anticipated payments are disbursed/received, a credit balance will be shown at that time.

Statement Summary

Past Due:

\$40,575.00

Current Semester Balance:

\$40,545.00

## IMPORTANT:

Workday and Nelnet links and username/ passwords *will not* be the same. Please be sure to bookmark [this link](#) to access each of the below options and save your username and password for each platform.

- Student Workday Login
- Make a One-Time electronic Payment through Nelnet
- Make a payment to your Payment Plan through Nelnet
- Make an International Payment through Flywire

We also recommend you bookmark these instructions for future use. Should you have any questions we can be reached at [studentaccounts@amherst.edu](mailto:studentaccounts@amherst.edu) 413-542-2811

Visit our website for detailed information and instructions on many other topics related to your student account.  
<https://www.amherst.edu/offices/controller/student-accounts>