

# Student Guide to Navigating the Finances App in Workday



Amherst College

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 continued**

Prior term balance details must be viewed by running 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 on a statement that is not specific to the term.

**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 PDF version. Statement view will only show the selected term balance details.

Remit To:	
Amherst College Office of the Controller PO Box 5000 Amherst, MA 01002-5000 United States of America	
Statement Date:	Student ID
February 10, 2023	
Past Due:	Current Semester Balance:
\$47.00	\$47.00

Transaction Date	Due Date	Description	Charges	Credits
07/08/2022	08/05/2022	Statement Charges		
		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	
01/05/2023	02/05/2023	Missing Athletic Equipment	47.00	
Total Statement Charges			\$43,376.00	
09/27/2022		Financial Aid / Payments (Disbursed and Applied) Wire - Flywire		43,329.00
Total Student Payments				\$43,329.00

Explanation of Terms:		Statement Summary	
<b>Past Due:</b> The past due balance consists of all charges past its due date regardless of the academic period it relates to.		Past Due:	\$47.00
<b>Current Semester Balance:</b> 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.		Current Semester Balance:	\$47.00

Remit To:	
Amherst College Office of the Controller PO Box 5000 Amherst, MA 01002-5000 United States of America	
Statement Date:	Student ID
February 10, 2023	
Past Due:	Current Semester Balance:
\$40,575.00	\$40,545.00

Transaction Date	Due Date	Description	Charges	Credits
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:		Statement Summary	
<b>Past Due:</b> The past due balance consists of all charges past its due date regardless of the academic period it relates to.		Past Due:	\$40,575.00
<b>Current Semester Balance:</b> 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.		Current Semester Balance:	\$40,545.00

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**Helpful Hint:** Clicking on items in **BLUE** text will create a popup box listing all individual charges that make up the total amount allowing you to drill deeper.

## STEP 4 Account Activity & Outstanding Charges:

*Total Account Balance* consists of all unpaid charges. This includes past due, current due and future due charges.

Account Activity

63,998.00  
Total Account Balance

16,235.00  
Due Now

View Statement

View Details

Outstanding Charges

16,235.00  
Past Due

0.00  
Current Due

47,763.00  
Future Due

*Due Now* is the amount currently owed and consists of current due charges and all charges past their due date.

*View Statement*- refer to step 3 for complete instructions.

*Past Due* consists of charges that have not been paid and were due in the past.

*Current Due* consists of charges due within the next 30 days.

*Future Due* consists of charges due more than 30 days into the future.

*View Details* will allow you to see a *Transaction Summary* of ALL account transactions regardless of term.

*Due Now Details* will allow you to see the individual amounts in each category for Past due, Current due, Anticipated payments and Unapplied payments.

Transaction Summary

Due Now Details

Past Due Charges 2,500.00

Current Due Charges 0.00

Anticipated Payments 0.00

Unapplied Payments 2.55

Criteria View by: Select a Field... and then by: Select a Field... Refresh

2 items

Academic Period	Transaction Date	Due Date	Description	Amount Due
Spring 2023	01/20/2023	02/20/2023	Financial Aid Advance - Access Grant	500.00
Fall 2022	01/17/2023	02/18/2023	Lost/Destroyed IT Equipment	2,000.00

*Anticipated Payments* consist of Financial Aid and sponsor contracts (such as payment plans) that have not yet been received and/or disbursed to your account.

*Unapplied Payments* consist of payments that have not been applied to charges. Contact [studentaccounts@amherst.edu](mailto:studentaccounts@amherst.edu) for further details or to request a refund if your unapplied amount is due to a payment unrelated to Financial Aid.

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### STEP 5

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

The screenshot shows the 'Payment Links' menu on the left with 'Make a Payment Through Nelnet' highlighted. On the right is the 'Account Activity' page for Norman Nelnet, showing a current balance of \$12,358.00 and a 'Make a Payment' button highlighted.

### STEP 6

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.

The screenshot shows the 'Payment Links' menu with 'Enroll in Nelnet Payment Plan' highlighted. On the right is the 'Payment Plan & Billing' page for Norman Nelnet, showing a current balance of \$58,943.38 and a 'Set up a Payment Plan' button highlighted. A sidebar on the right shows 'Norman Nelnet' with a 'Two Authorized Parties on your account. Add an Authorized Party.' link highlighted.

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).

The screenshot shows the 'Make A Payment' screen with a progress indicator (1, 2, 3) and a table of accounts to pay. The 'Student Account Balance' for Spring 2023 is checked and highlighted.

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

At the bottom, the 'Next - Payment Method' button is highlighted.

### STEP 7

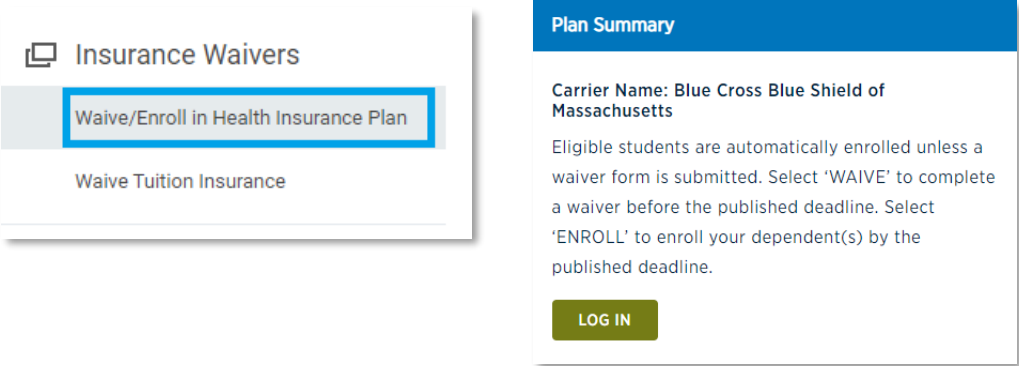
Payment Links: *Deposit Funds to AC Dollars* will bring you to the GET Funds site where you can electronically load funds to your AC Dollar account. Select the *Click here to login* link.

The screenshot shows the 'Payment Links' menu with 'Deposit Funds to AC Dollars' highlighted. On the right is the 'AC DOLLAR\$ DEPOSITS' page, which includes a 'Click here to login' link highlighted in a blue box.

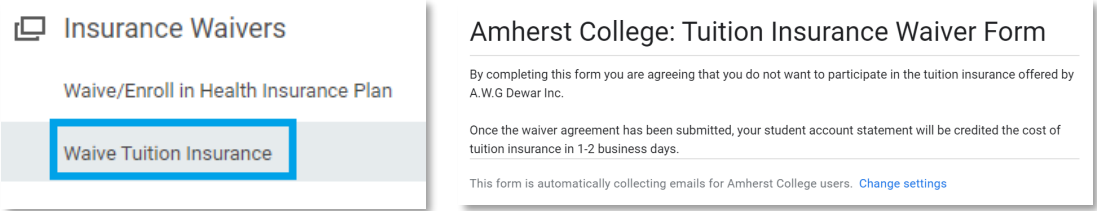


### STEP 8

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.

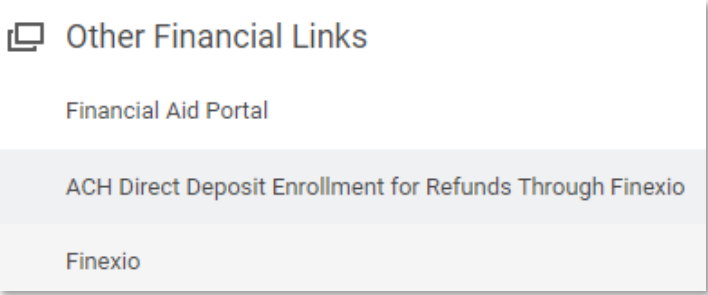


Insurance Waivers: *Waive Tuition Insurance* will bring you to the Amherst College: Tuition Insurance Waiver Form via Google Forms. This must be accessed using your Amherst College student email address.



**\*\*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 9



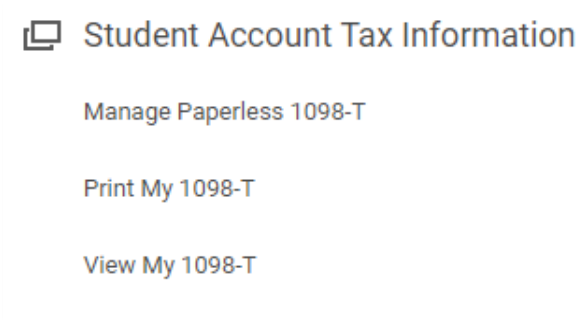
Other Financial Links: *Financial Aid Portal* brings you to the Amherst College Online Financial Aid System where you can submit an aid application or view your award documents and history. For questions on your Financial Aid please contact [finaid@amherst.edu](mailto:finaid@amherst.edu)

Other Financial Links: *ACH Direct Deposit Enrollment for Refunds Through Finexio* brings up the instructions to add banking information in Finexio so students can receive refunds faster. Students who do not enter banking information will receive all refunds via echeck sent to their Amherst email.

Other Financial Links: *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.



## STEP 10



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 box values and explanations.

## 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>