Path to Understanding Your Financial Landscape

NU Beginnings
New Graduate
Student Orientation 2013
Introductions

• Darryl O’Daniel, Associate Director, Office of Student Accounts
• Ken Gehrling, Senior Payroll Manager, Payroll
• Mike Fernandez, Program Assistant, TGS
• Mary MacLean, Financial Aid Coordinator, Assistantships, TGS
• Pat Mann, Assistant Dean, TGS
Agenda

- Office of Student Accounts Information
- Payroll Information
- Tax Information
- Assistantship requirements
- Fellowships and Scholarships
- Health Insurance and Subsidy Process
- Contact Information
- Questions
General Topics

- Academics
- Financial Services
- Personal Information

- Make a Payment (Student or Guest)
- Guest Access - Third Parties
- Other – Few Little Extras
System Access Student & Guest

Example:
NetID – abc### for system access
Emplid – 247#### is your account student ID
Welcome to CAESAR

To Dos
No To Do's.

Holds
No Holds.

Upcoming Schedule

Class Schedule Schedule
FINCX 441-0-92 LEC (17982) Room: TBA
INTLX 464-9-KH LEC (17886) Room: TBA
MECNX 441-0-92 LEC (17980) Room: TBA
MECNX 450-0-92 LEC (17970) Room: TBA
MKGX 456-0-KH LEC (17887) Room: TBA
MORSX 470-0-LO LEC (17865) Room: TBA
MORSX 913-A-92 LEC (17970) Room: TBA
OPNSX 455-0-92 LEC (17985) Room: TBA
SEEKX 310-0-LO LEC (17859) Room: TBA

Enrollment

Enrollment
Shopping Cart
View My Holds

Class Search and Catalogs

Search for Classes
Search Class Descriptions in CAESAR
Browse Class Descriptions
Undergraduate Course Catalog
Law School Course Catalog

Course and Teacher Evaluations

Evaluate Classes (CTECs)
This page allows you to choose the class you are going to evaluate.

Bookstores

Update Emergency Information

Click the link to update or review your Emergency Contact Information.

Update Emergency Information

My Academics

View My Grades
View Unofficial Transcript
View Degree Progress and What-If Reports

Personal Profile

Manage Guest Access
Allow parents and others to access your student records, such as grades, bills and payments

Quick Links

Billing and Payment FAQ

Links to Centers

Student Center
Use this link to access your old CAESAR Home Page

Student Financial Services

Access to your bills, payments and Financial Aid

View My Account (Real-Time, Daily Activity)
View or Pay Tuition Bill (Monthly Snapshot)
To Do Items
View My Financial Aid

CAESAR - Student Center
Primary Items:
- Holds
- To Do List
Willie Wildcat

Your Holds

Hold Item

Refund Hold

Reason and Contact

Description: Northwestern University
Start Term: Begin Term - Srvc Indicatr Use
Start Date: 06/12/2010
Reason: EMP Student
Department: University
Contact:

Instructions

As a student in the Executive Masters Program your request for a refund on your student account needs to be reviewed prior to processing. Contact the Office of Student Accounts (491-5224 or 503-8503).
Student Center Financial Services

- View My Account (Real-Time, Daily Activity)
- View and/or Pay Tuition Bill (Monthly Snapshot)
- Apply for 9PAY
- Make 9PAY Payment
- Request a Refund
- Apply for Financial Aid
- Setup Direct Deposit
- Financial Info - Permission
- 1098 - T
- View Financial Aid
- View Debt Summary Information
- Accept/Decline Financial Aid
- To Do Item History
- NU Loan Application
- Work Study by Academic Year
- Non-Credit Class Payment
- Graduate Assistant Contract
- Graduate Assistant Qtr Report

Primary Items Noted By:
Financial Services – Link Descriptions

View My Account (Real-Time, Daily Activity)
• Real time online display of your tuition and fee account

View and/or Pay Tuition Bill (Monthly Snapshot)
• View your monthly invoices and make payments online

Request a Refund
• Process an online refund request for direct deposit or check by mail

Setup Direct Deposit
• Setup a direct link for depositing refunds from your tuition and fee account (This is not linked to Payroll.)
Financial Services – Link Descriptions

View Financial Aid (Apply for Financial Aid – N/A)
  • View and track the status of certain types of financial aid

1098 - T
  • Annual statement of tuition, scholarship and grants for IRS tax purposes

Apply for 9PAY / Make 9Pay Payment
  • Tuition and fee monthly installment payment plan

Guest Access – Main Menu Item
  • Build a profile to allows Guest online access to information, authorization to review and discuss the details of your tuition and fee account
Financial Services - View My Account

Northwestern University Customer Account

Grand Totals:
- Account Balance: $0.00
- Total Anticipated Aid: $0.00
- Adjusted Balance: $0.00

Please Note: The "Grand Totals" were calculated by summing the term by term ending balances from the detail below.

Your adjusted balance is typically as of the prior business day. Most transaction changes to your account are posted nightly. Your balance includes all previous outstanding debts, including those from previous terms. Your account balance is calculated by subtracting credits and payments from charges made to your account. Your adjusted balance is calculated by subtracting your anticipated aid from your account balance. A change in your anticipated aid will change your balance due.

Term Totals (use arrows to move from term to term)

<table>
<thead>
<tr>
<th>Term</th>
<th>Account Balance</th>
<th>Anticipated Aid</th>
<th>Adjusted Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013 Spring</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

Account Transactions (Charges and Credits)

<table>
<thead>
<tr>
<th>Date Posted</th>
<th>Effective Date</th>
<th>Date Billed</th>
<th>Description</th>
<th>Due Date</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>03/06/2013</td>
<td>03/06/2013</td>
<td>03/10/2013</td>
<td>Spring Tuit-Exec Master's-NAP</td>
<td>04/01/2013</td>
<td>$27,750.00</td>
</tr>
<tr>
<td>03/18/2013</td>
<td>03/18/2013</td>
<td>04/10/2013</td>
<td>Fed Direct Unsub Stafford Loan</td>
<td>05/01/2013</td>
<td>$6,766.00</td>
</tr>
<tr>
<td>03/18/2013</td>
<td>03/18/2013</td>
<td>04/10/2013</td>
<td>Federal Direct Grad PLUS Loan</td>
<td>05/01/2013</td>
<td>$-22,310.00</td>
</tr>
<tr>
<td>04/04/2013</td>
<td>04/04/2013</td>
<td>04/10/2013</td>
<td>Refund-Self Service</td>
<td>05/01/2013</td>
<td>$1,326.00</td>
</tr>
</tbody>
</table>

Anticipated Aid

<table>
<thead>
<tr>
<th>Date Applied</th>
<th>Expiration Date</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
</table>

All actual funds are posted, no anticipated aid.
Financial Services - View and/or Pay Tuition Bill

Student & Guest

1. Login through Caesar Netid and Password
2. Click View and/or Pay Tuition Bill (Student Center)
3. Connect to **QuikPay link**
4. Click Make Payment
5. Enter amount and method of payment
6. Enter Banking (routing & account number) / Credit Card information
7. Click on Continue

Print confirmation of Payment and Reference number

**Instructions available online: www.northwestern.edu/sfs**
Financial Services - View and/or Pay Tuition Bill

Message Board for Tuition & Fees Invoice

Welcome to QuikPAY® where you can view your Northwestern University tuition and fees bills and make payments to your student account -- all online.

Payment by Credit Card Available
Northwestern has partnered with a third party to allow credit card as a payment method. Approved credit cards are American Express, Discover, Mastercard and VISA.

Please Note: The third party service provider will charge a 2.75% fee for credit card payments. Northwestern does not encourage credit card payments; however, some families may find credit card payments beneficial. There are no fees for the eCheck payment method.

Bills
Monthly Statement: View and print your current invoice
Statement History: View and print your past invoices

Payments
Make Payment: Make an immediate payment
Scheduled Payments: View any currently scheduled payments
Transaction History: View past payments

Preferences
Payment Profiles: Set up and securely save your financial account information for making payments
User Preferences: Specify billing and payment options

Help
Watch for this 'Help' symbol and click on it for additional instructions.

*Pass through authentication*
QuikPAY - Current Statement

Below is the current statement.

- To view statement history, please select "Statement History" from the dropdown list.
- To make a payment, please select "Make Payment" from the dropdown list.

Account Actions: Select Action

View as PDF

User Preferences
Current Statement
Statement History
Scheduled Payments
Transaction History

<table>
<thead>
<tr>
<th>Billing Date</th>
<th>Account Name</th>
<th>Account Number</th>
<th>Date Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/10/11</td>
<td>Tuition and Fees</td>
<td></td>
<td>09/01/11</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Activity Through</th>
<th>Previous Account Balance</th>
<th>Net Charges</th>
<th>Net Actual Aid and Payments</th>
<th>New Account Balance</th>
<th>Anticipated Aid</th>
<th>Adjusted Balance Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/09/11</td>
<td>12.75</td>
<td>25,321.00</td>
<td>18,075.00CR</td>
<td>7,258.75</td>
<td>8,617.92CR</td>
<td>1,359.17CR</td>
</tr>
</tbody>
</table>

If your adjusted balance due (total charges less aid/rebate) has not been satisfied, your transcript and registration privileges will be prohibited. If an adjustment or expected financial aid has not been credited, contact the appropriate office.

<table>
<thead>
<tr>
<th>Date</th>
<th>Term</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/05/11</td>
<td>FA1112</td>
<td>Student Health Plan</td>
<td>2,584.00</td>
</tr>
<tr>
<td>08/01/11</td>
<td>FA1112</td>
<td>Fall Tuition-KGSM</td>
<td>18,000.00</td>
</tr>
<tr>
<td>08/04/11</td>
<td>FA1112</td>
<td>McManus 1BR</td>
<td>4,662.00</td>
</tr>
<tr>
<td>08/01/11</td>
<td>FA1112</td>
<td>KSM Student Activity Fee</td>
<td>75.00</td>
</tr>
<tr>
<td>08/09/11</td>
<td>FA1112</td>
<td>Billed To Third Party Ev</td>
<td>18,075.00CR</td>
</tr>
</tbody>
</table>

PREVIOUS ACCOUNT BALANCE: 12.75

NEW ACCOUNT BALANCE: 7,258.75

TOTAL ANTICIPATED AID: 8,617.92CR

ADJUSTED BALANCE DUE: 1,359.17CR

Your account has been credited with anticipated aid to assist you in determining your balance due. Additional details about your financial aid and account may be viewed on-line at www.northwestern.edu/caesar/.
Quikpay/ Paper Invoice PDF

FOR OFFICE ONLY

Account Name: [Name]
Account Number: [Number]
Due Date: [Date]
Amount Due: [Amount]

Adjustment Date: [Date]
Adjusted Balance Due: [Amount]

Activity Posted: [Activity]
Posting Account Number: [Number]
Net Charges: [Amount]
Net Total Paid: [Amount]
New Account Balance: [Amount]
Adjusted Account Balance: [Amount]

PREVIOUS ACCOUNT BALANCE: [Amount]
NEW ACCOUNT BALANCE: [Amount]
TOTAL ANTICIPATED AID: [Amount]
ADJUSTED BALANCE DUE: [Amount]

Please return the above portion with your payment. Write your account number on check or money order to ensure proper credit.

NORTHEASTERN UNIVERSITY FINANCIAL REGULATIONS

An individual who has an outstanding indebtedness to the University may not be allowed to register, preregister, receive a transcript of his or her academic record, or have degrees confirmed. A substantial late payment fee may be assessed if the account is not paid by the due date. If you contest a portion of the bill, you should pay the uncontested portion by the due date and immediately contact the appropriate office in writing to request an adjustment. The University reserves the right to refer any account over 60 days past due to a collection agency. The individual will be responsible for any costs associated with the collection of his or her past due account including, but not limited to, collection agency costs, court costs and legal fees. Title IV assistance is not available prior to the first day of class.

Current Term Account Summary: [Date]
Prior Term Account Balance: [Amount]
- Prior Term Transactions: [Amount]
- Tuition: [Amount]
- Room & Board: [Amount]
- Other Charges: [Amount]
- Grants & Scholarships: [ Amount]
- Loans: [Amount]
- Payments: [Amount]
- Other Credits: [Amount]
- Anticipated Aid: [Amount]

Adjusted Balance Due: [Amount]

The Office of Student Accounts acts as a clearing house for various student charges and credits which are placed directly on a student's bill by several departments and offices of the University. Since Student Accounts does not have detailed records concerning many items which may appear on a bill, we suggest you contest the appropriate office listed below if you have a question.

Item: Room, board, maintenance fees & social dues:
Undergraduate: [Contact Information]
Graduate: [Contact Information]
Fraternity/Sorority: [Contact Information]

Loans (application & University approval), grants, fellowships, scholarships:
Undergraduate: [Contact Information]
Graduate School of Management: [Contact Information]
Graduate School of Music: [Contact Information]
Graduate School & other Graduate programs: [Contact Information]
Student Registration Plan: [Contact Information]
Health Service Charges: [Contact Information]
University Library: [Contact Information]
Parking Fines: [Contact Information]

NOTICE: See last page for Current Term Account Summary and important information.

Please contact [Contact Information] for assistance.

Office of Student Accounts: [Address]
Phone: [Phone Number]

Current Year Financial Regulations

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Financial Services - View and/or Pay Tuition Bill

Enter Payment Amount for Tuition & Fees Invoice

Payment by Credit Card Available
Northwestern has partnered with a third party to allow credit card as a payment method. Approved credit cards are American Express, Discover, MasterCard and VISA.

Please Note: The third party service provider will charge a 2.75% fee for credit card payments. Northwestern does not encourage credit card payments; however, some families may find credit card payments beneficial. There are no fees for the eCheck payment method.

Note for non-USA credit card payments (after clicking "Continue"):
Kindly enter your postal code without a hyphen. If no postal code is used, enter zeroes.
Examples of accepted postal codes:
Accepted: Bogota, Cundinamarca 0000 COLOMBIA
Accepted: Sao Paulo, SP 05707001 BRAZIL

Examples of rejected postal codes containing space character or hyphen:
Rejected: Bogota, Cundinamarca COLOMBIA
Rejected: Sao Paulo, SP 05707-001 BRAZIL

You may begin authorizing a one-time, electronic payment by completing the information below. Enter your payment information and click "Continue."

Account: Tuition and Fees
Due Date: 12/01/2008
Amount Due: $0.00
Statement Balance: $0.00
Payment Amount: 
Payment Method: eCheck

Continue  Cancel
Financial Services - View and/or Pay Tuition Bill

Provide eCheck Information for Tuition & Fees Invoice

Enter and store your bank account information (banks located within the United States only) in an eCheck Profile so that you can make future payments from your account without re-entering the information. You simply reference the account by the Profile Name. All financial account information entered in QuikPAY® is secure and confidential. Please note that certain money market and credit union accounts do not allow for electronic payments. Check with your banking institution to be certain. See Late Payments and Other Problems.

Carefully enter all information below and then click the 'Add' button.

Current Payment

Tuition and Fees

Payment Amount: $500.00
Effective Date: 07/25/2013

Account Information

Holder's Name: 
Account Type: CHECKING
Routing Number: 
Account Number: 
Reenter Account Number: 
This page indicates the general location of your routing and bank account numbers. The symbols around each set of numbers will be the same regardless of slight variances in placement. Simply enter the numbers between the symbols and our secure software will do the rest.

**Routing Number:**
Your routing number is enclosed within the following symbol. Enter only the numbers between the symbols. This number is usually 9 digits.

Routing Number symbol: ☐

**Bank Account Number:**
Your account number precedes the following symbol. Enter only the numbers in front of this symbol. This number is 4 - 17 digits, and is either a single set of numbers (examples 1 and 2) or is two sets of numbers (example 3 - used by Bank of America).

Bank Account symbol: ☐

**NOTE:** Do not include the CHECK NUMBER as part of the ACCOUNT NUMBER.

Not sure? Contact your bank or use your bank statement to verify your ACCOUNT NUMBER.
Financial Services - View and/or Pay Tuition Bill

VISA is now accepted, regulations change.
QuikPAY - Make Payment
Confirm Information

Is this Tuition & Fees Invoice payment information correct?
Please verify your payment amount and account information below. Payment Authorization

Click the 'Confirm' button to submit this payment.
Click the 'Edit' button to change your financial account information for this payment.
Click the 'Cancel' button to cancel the payment.

Current Payment

<table>
<thead>
<tr>
<th>Tuition and Fees</th>
<th>Payment Amount:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$500.00</td>
</tr>
</tbody>
</table>

Effective Date: 07/25/2013

Account Information

<table>
<thead>
<tr>
<th>Holder's Name:</th>
<th>Darryl ODaniell</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Type:</td>
<td>CHECKING</td>
</tr>
<tr>
<td>Routing Number:</td>
<td>071000013</td>
</tr>
<tr>
<td>Account Number:</td>
<td>****6789</td>
</tr>
</tbody>
</table>

I hereby authorize the Merchant, or its Agent, to initiate a debit entry to the account indicated above at the depository financial institution named above and to debit the same to such account. I acknowledge that the origination of ACH transactions to my account must comply with the provisions of U.S. Law.

NOTE: Once you submit the above payment, it will be processed on the date indicated. Should you decide to cancel the payment once submitted, you are responsible for contacting your financial institution to request a Stop Payment Order. Please be aware that the Stop Payment Order must reach your financial institution prior to your account having been debited.

Non-Sufficient Funds Statement: Should any check be returned from the bank due to insufficient funds, the face value of the check and a NSF fee will be charged to your account.

Confirm Edit Cancel
Receipt and Email Confirmation

Payment Receipt for Tuition & Fees Invoice

This is your receipt. Please click the Print icon to generate a printer-friendly version for your records.

The payment has been submitted by: [Redacted] Thank you.

Confirmation Number: 5000847278

Payment Date: Jun 15, 2012 at 6:30 PM, CDT
Effective Date: Jun 18, 2012
Primary User Id: [Redacted]
Primary User Name: [Redacted]
Account: Tuition and Fees
Payment Amount: $1.00
Holder’s Name: Darryl ODaniel - Test
Payment Method: CHECKING ***6789

From: northwestern_quikpay_prod@infinet-inc.com
To: d-daniel@northwestern.edu
Subject: Notification For Actual Payer

Darryl Odaniel,

An eCheck payment in the amount of $1.00 was made on 03/10/2009 at 09:11 AM.

The confirmation number is 777369.

 Regards,
QuikPAY Online Services
## QuikPAY

### Invoice and Payment History Information

**Statement History**

To view a specific statement, please click the appropriate "Detail" icon.

<table>
<thead>
<tr>
<th>Detail</th>
<th>Billing Date</th>
<th>Balance</th>
<th>Due Date</th>
<th>Amount Due</th>
<th>Notification</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>08/10/2011</td>
<td>$2,684.40</td>
<td>09/01/11</td>
<td>$2,684.40</td>
<td></td>
</tr>
<tr>
<td></td>
<td>06/10/2011</td>
<td>$0.00</td>
<td>07/01/11</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>05/10/2011</td>
<td>$5,065.00</td>
<td>06/01/11</td>
<td>$5,065.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>04/10/2011</td>
<td>$4,915.00</td>
<td>05/01/11</td>
<td>$4,915.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>03/10/2011</td>
<td>$28,819.00</td>
<td>04/01/11</td>
<td>$28,819.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>02/10/2011</td>
<td>$17,385.00</td>
<td>03/01/11</td>
<td>$17,385.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>01/10/2011</td>
<td>$17,235.00</td>
<td>02/01/11</td>
<td>$17,235.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>12/11/2010</td>
<td>$17,235.00</td>
<td>01/01/11</td>
<td>$17,235.00</td>
<td></td>
</tr>
</tbody>
</table>

**Online Transaction History**

Listed below are all online transactions. To view transaction details, click the appropriate "Detail" icon.

**NOTE:** Invalid transactions are identified by the "Invalid Transaction" icon next to the confirmation number.

<table>
<thead>
<tr>
<th>Detail</th>
<th>Confirmation Number</th>
<th>Date</th>
<th>Amount</th>
<th>Account</th>
<th>Payment Method</th>
<th>Payer</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1269806</td>
<td>05/10/11</td>
<td>$5,065.00</td>
<td>Tuition and Fees</td>
<td>CHECKING</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1221178</td>
<td>02/21/11</td>
<td>$5,800.00</td>
<td>Tuition and Fees</td>
<td>CHECKING</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1169687</td>
<td>11/15/10</td>
<td>$5,602.00</td>
<td>Tuition and Fees</td>
<td>CHECKING</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1002853</td>
<td>02/24/10</td>
<td>$1,482.60</td>
<td>Tuition and Fees</td>
<td>CHECKING</td>
<td></td>
</tr>
<tr>
<td></td>
<td>907014</td>
<td>09/10/09</td>
<td>$1,469.60</td>
<td>Tuition and Fees</td>
<td>CHECKING</td>
<td></td>
</tr>
<tr>
<td></td>
<td>848288</td>
<td>06/14/09</td>
<td>$5,627.00</td>
<td>Tuition and Fees</td>
<td>CHECKING</td>
<td></td>
</tr>
<tr>
<td></td>
<td>822572</td>
<td>04/28/09</td>
<td>$1,336.20</td>
<td>Tuition and Fees</td>
<td>CHECKING</td>
<td></td>
</tr>
<tr>
<td></td>
<td>780099</td>
<td>03/10/09</td>
<td>$1,337.20</td>
<td>Tuition and Fees</td>
<td>CHECKING</td>
<td></td>
</tr>
<tr>
<td></td>
<td>731524</td>
<td>12/17/08</td>
<td>$2,695.85</td>
<td>Tuition and Fees</td>
<td>CHECKING</td>
<td></td>
</tr>
</tbody>
</table>
QuikPAY
User Preferences Information

User Preferences
Specify your billing delivery and payment notification options below and then click the "Save" button.

More User Preference info

Email Addresses
Primary: d-odaniel@northwestern.edu
Secondary: [blank]

Notification
When a bill arrives.
A copy of my payment confirmation.
When an authorized payer has made a payment.

Send me a paper bill.

Bill Notification via Email
With QuikPAY® electronic billing, you will always be notified at your Northwestern email address when a new bill is available online. You may also provide a Secondary Email Address for yourself.

Payment Confirmation via Email
You may optionally receive payment confirmations via email for payments you make and/or for payments made by an authorized payer.

Bill Delivery Method
Though Northwestern encourages you to receive your tuition and fees bills electronically, you may request a Paper Bill instead.
Financial Services - View and/or Pay Tuition Bill Summary

- View current or historical invoice(s) online
- Email notification of current invoice
- Make online payment
  Individual (student)
  Guest (parents, others)
- Electronic history of payments and source of funds
- Less paper to file
International Payment Instructions

Northwestern University
Office of Student Accounts
555 Clark Street
Evanston, IL 60208, US
http://www.northwestern.edu/sfs/

Payment

* In United States Dollars, the amount you want Northwestern University to receive

$27,750.00

* What country are you paying from?

Brazil

Payment Options

Domestic Bank Transfer in Brazilian Real (BRL)

Price

59,719.00 BRL

I want to pay in another currency

Why pay through peerTransfer?

- Eliminate hidden bank fees – ensure Northwestern University receives the correct amount.
- Save on exchange rates – in most cases you can make a payment in your home currency, peerTransfer will process the currency exchange – offering you wholesale exchange rates, unmatched by traditional banks.
- Peace of mind – 24x7 multilingual customer support when you need it most. Know where your payment is in the bank transfer process.
International Payment Instructions

To Complete this Payment

1. **Payer Information**
   - First / Given name on bank account
   - Middle name
   - Last name / Surname / Family name

2. **Send 59,719.00 BRL via Bank Transfer from your bank (online, by phone or in person)**

3. **Follow the Bank Transfer Instructions**
   - Track the progress of your payment as $27,750.00 is delivered to Northwestern University

peerTransfer Account

- Create a new account
- Sign into an existing account

* First / Given Name

* Last name / Surname / Family name

* Email

* Password

* Password Confirmation

Create a new account to...

- Send payments to Northwestern University
- Track your funds as they are delivered
- Get immediate assistance if you have any questions

| 9694995 | Payment-Thank you-peerTransfer | 03/11/2013 | 03/11/2013 | 04/10/2013 | -8505.00 | LM4 |
Dear Parent/Student

Re: INCOMING WIRE TRANSFER INSTRUCTIONS

It is possible to wire transfer funds to pay your account. We must have the following information to process all such payments:

1. Source of wire (sender and bank).
2. Any identifying code numbers (reference and verification).
3. Date wire transfer is expected.
4. Amount of wire transfer.

Please e-mail this information to studentaccounts-ev@northwestern.edu

All incoming wires should be directed to Northwestern’s Depository Bank with instructions to the sender to include as much pertinent information on it as possible for identification purposes: i.e. for Tuition & Fees payment, the Account name & ID number. The wire address is:

JP Morgan Chase Bank
1603 Orrington Avenue
Evanston, IL 60201
ABA # 021000021
NORTHEASTERN UNIVERSITY
GENERAL FUNDS ACCOUNT
# 5571111
Swift Code: CHASUS33

Wire transfers usually incur extra bank fees and should be used only in special circumstances.

Thank you,

Office of Student Accounts
Payroll Deduction

Northwestern’s payroll deduction option allows graduate students to deduct their health insurance and/or campus housing payments from their stipend checks over a nine- to twelve-month period.

Eligibility
Payroll deduction is available to graduate students who receive a stipend or pay from the University.

Payments
When you complete the Payroll Deduction Authorization Form, you can specify the amounts you would like deducted for health insurance and/or graduate housing each month.

You are responsible for paying any remaining balance due on your student account bill, not covered by payments from your payroll deductions or by credits applied to your account in anticipation of payments from payroll deductions or by financial aid payments or credits.

Billing
If you sign up to make payments via payroll deductions, an advance credit will be applied to your student account, and then each month the amount deducted from your stipend check will be applied automatically against the credit in your account.

Application details
Complete the Payroll Deduction Authorization Form (or the Previous Year’s Form during the summer term) and deliver it to the Evanston Student Accounts office or the Chicago Student Accounts Office.

It is due before the 8th of the month in which deductions will begin.
Financial Services – Setup Direct Deposit

Setup for student services through CAESAR only. This not linked to Payroll.
Financial Services – Request a Refund

All students are advised to confirm banking or address information before submitting a refund request.

(Direct Deposit or Mailing Address)
Financial Services – 1098 - T

Northwestern University CAESAR QA

Student Financials
1098-T Delivery Method and View & Print 1098-T

The current delivery method for your 1098-T is Electronic. If you wish to change your delivery method click Change to paper.

Choose from:
- Change to paper
- Current is electronic

The 1098-T Tuition Statement will be available the last week of January. To view & print the 1098-T form, please select "View & Print 1098-T" link.

View & Print 1098-T

A 1098-T Tuition Statement and its corresponding information letter is available for you to access electronically for the years below. Click on the year to bring up the printable form and its supporting transaction information.

<table>
<thead>
<tr>
<th>1098-T Year</th>
<th>Report Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>Information Letter</td>
</tr>
<tr>
<td>2012</td>
<td>1098-T Form</td>
</tr>
</tbody>
</table>
View & Print 1098T

A 1098-T Tuition Statement and its corresponding information letter is available for you to access electronically for the year below. Click on the year to bring up the printable form and its supporting transaction information.

<table>
<thead>
<tr>
<th>Year</th>
<th>Report Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>1098-T Form</td>
</tr>
</tbody>
</table>

---

**Financial Services – 1098 - T**

**Form 1098-T**

**Tuition Statement**

- **FILER'S name, street address, city, state, ZIP code and telephone number**
  - Northwestern University
  - 555 Clark Street
  - Evanston, IL 60201-1221
  - Tel: (847) 491-5224

- **2012**

- **DNB No. 1545-1574**

- **Payments received for qualified tuition and related expenses**
  - $55,500.00

- **Amounts billed for qualified tuition and related expenses**
  - $55,500.00

- **STUDENT’S federal identification no.**
  - 36-2167817

- **STUDENT’S social security number**
  - 36-2167817

- **If this box is checked, your educational institution has changed its reporting method for 2012**
  - □

- **Copy B For Student**

  This is important tax information and is being furnished to the Internal Revenue Service.

- **Box 2 Tuition Billed**
  - Fall Tuition - Exec Masters-NAP
    - 08/01/2012
    - $27,750.00
  - Winter Tuition - Exec Masters-NAP
    - 12/03/2012
    - $27,750.00

- **Total Tuition**
  - $55,500.00

- **Loans and Payments**
  - Tuition Deposit - EV
    - 07/06/2012
    - $5,500.00
  - Fed Direct Unsub Stafford Loan
    - 09/04/2012
    - $6,155.00
  - Federal Direct Grad PLUS Loan
    - 09/04/2012
    - $22,000.00

- **Total Loans and Payments**
  - $34,654.00

---

Form 1098-T (keep for your records)

Department of the Treasury - Internal Revenue Service

The above information being reported to the IRS by Northwestern University is a requirement for the Taxpayer Relief Act of 1997. You or the person who claims you as a dependent on his or her tax return, may be eligible for a tax credit. The additional information detailed below, which is not being reported to the IRS, may be helpful in determining the tax credit, if any. You may wish to contact your tax professional or the IRS for more specific information regarding the tax credit. Should you have any questions regarding the content of the 1098-T issued by Northwestern University, please call the Office of Student Accounts at (847) 491-5224.
## Financial Services - View Financial Aid

### Select Aid Year to View

<table>
<thead>
<tr>
<th>Aid Year</th>
<th>Institution</th>
<th>Aid Year Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>Northwestern University</td>
<td>Financial Aid Year 2010-2011</td>
</tr>
<tr>
<td>2010</td>
<td>Northwestern University</td>
<td>Financial Aid Year 2009-2010</td>
</tr>
</tbody>
</table>

* Aid years listed indicate your access to eligibility information regarding your Financial Aid Application.

### Award Summary

**Financial Aid Year 2010-2011**

Select the scheduled disbursements dates hyperlink to review when you may receive funds.

<table>
<thead>
<tr>
<th>Award Description</th>
<th>Category</th>
<th>Offered</th>
<th>Disbursed Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fed Direct Sub Stafford Loan</td>
<td>Loan</td>
<td>$8,414.00</td>
<td></td>
</tr>
<tr>
<td>Fed Direct Unsub Stafford Loan</td>
<td>Loan</td>
<td>$12,086.00</td>
<td></td>
</tr>
<tr>
<td>Federal Direct Grad PLUS Loan</td>
<td>Loan</td>
<td>$58,974.00</td>
<td></td>
</tr>
<tr>
<td>Federal Direct Grad PLUS Loan</td>
<td>Loan</td>
<td>$6,000.00</td>
<td></td>
</tr>
<tr>
<td><strong>Academic Year Totals</strong></td>
<td></td>
<td><strong>$85,474.00</strong></td>
<td></td>
</tr>
</tbody>
</table>

Currency used is US Dollar.

[Financial Aid Eligibility](#)  
[Accept/Decline Awards](#)

**Terms**
Cash Advance:
The University will advance funds based on the expectation of financial aid, all required documentation must be completed timely.

Emergency Loan:
In the event of an emergency situation, the University will advance limited funds based on need.
Student Center Personal Information

Please keep your personal information current.
Student Center Guest Access

Guest Access

Wildcat, Willie 2567768

- ADD GUEST: Guests have access to the areas of your student record in CAESAR for which you authorize them. You may add, modify, activate and deactivate guests and their areas of access at any time.
- DEACTIVATE removes your guest’s ability to log in. You may deactivate and reactivate at any time. Reactivation does NOT require a password reset.
- An UNLOCK button means your guest’s account is locked. To unlock the account click the "Unlock" button and change the password.

<table>
<thead>
<tr>
<th>Guest ID</th>
<th>Name</th>
<th>Relationship</th>
<th>Passcode</th>
<th>Status</th>
<th>Edit</th>
<th>Deactivate</th>
</tr>
</thead>
<tbody>
<tr>
<td>DAO0941#1</td>
<td>Shirley EMP - Review</td>
<td>Other</td>
<td>EMP080710</td>
<td>Active</td>
<td></td>
<td></td>
</tr>
<tr>
<td>GCC135#1</td>
<td>Mickey Mouse</td>
<td>Other</td>
<td>EMP-Review</td>
<td>Active</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Student Center Guest Access

FERPA

Consent for release of information

The Family Education Rights and Privacy Act limits the extent to which Northwestern University may disclose personally identifiable information from student education records without the student’s express written permission.

I understand that, by adding one or more individuals to the Guest Permission list, I am giving written consent for University representatives to disclose student information specified by me herein to the individual(s) identified on the Guest Permission list for the purpose of facilitating the administration of the specified information.

* □ I agree to the policy above
  (* Required: agreement is required to create a guest account)

Submit  Cancel
Student Center Guest Access

- **Guest ID**: Your guest will receive an email with his or her guest ID after you create the account (below).
- **Password/Passcode**: You must give your guest his or her passcode and password.
- **Password Change**: You are responsible for changing the password if the guest forgets the password or locks the account.

*Required field*

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guest ID</td>
<td>NEW</td>
</tr>
<tr>
<td>*Last Name</td>
<td>EMP - Review</td>
</tr>
<tr>
<td>*First Name</td>
<td>Shirley</td>
</tr>
<tr>
<td>*Relationship</td>
<td>Other</td>
</tr>
<tr>
<td>*Email</td>
<td><a href="mailto:s-khumkit@northwestern.edu">s-khumkit@northwestern.edu</a></td>
</tr>
<tr>
<td>Confirm Email</td>
<td><a href="mailto:s-khumkit@northwestern.edu">s-khumkit@northwestern.edu</a></td>
</tr>
<tr>
<td>*Passcode</td>
<td>EMP080710</td>
</tr>
<tr>
<td>*Password</td>
<td>[Secure]</td>
</tr>
</tbody>
</table>

(Password length 5-16 characters. Passcode authorizes a guest for Financial Aid and Student Accounts phone support.)

**Status**: Active

**Allow Access to:**
- Grades
- Addresses
- Phone Numbers
- Review Emergency Info
- View Financial Aid
- To Do Item History
- View Debt Summary Information
- View My Account
- View E-Bill & E-Payment
- 1098-T
**Student Center Guest Access**

- **Guest ID**: Your guest will receive an email with his or her guest ID after you create the account (below).
- **Password/Passcode**: You must give your guest his or her passcode and password.
- **Password Change**: You are responsible for changing the password if the guest forgets the password or locks the account.

<table>
<thead>
<tr>
<th>*Relationship</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brother</td>
</tr>
<tr>
<td>Daughter</td>
</tr>
<tr>
<td>Employee</td>
</tr>
<tr>
<td>Employer</td>
</tr>
<tr>
<td>Father</td>
</tr>
<tr>
<td>Friend</td>
</tr>
<tr>
<td>Grandfather</td>
</tr>
<tr>
<td>Grandmother</td>
</tr>
<tr>
<td>Ln Co-Makr</td>
</tr>
<tr>
<td>Ln Co-Sign</td>
</tr>
<tr>
<td>Ln Refernc</td>
</tr>
<tr>
<td>Mother</td>
</tr>
<tr>
<td>Neighbor</td>
</tr>
<tr>
<td>None Indi</td>
</tr>
<tr>
<td>Oth Relat</td>
</tr>
<tr>
<td>Other</td>
</tr>
<tr>
<td>Partner</td>
</tr>
<tr>
<td>Roommate</td>
</tr>
<tr>
<td>Self</td>
</tr>
<tr>
<td>Sister</td>
</tr>
<tr>
<td>Son</td>
</tr>
<tr>
<td>Spouse</td>
</tr>
<tr>
<td>Step-Father</td>
</tr>
<tr>
<td>Step-Mother</td>
</tr>
<tr>
<td>Works For</td>
</tr>
</tbody>
</table>

**Required Fields**

- **Guest ID**: [Insert Value]
- **Last Name**: [Insert Value]
- **First Name**: [Insert Value]
- **Relationship**: [Insert Value]
- **Email**: [s-humil@northwestern.edu]
- **Confirm Email**: [s-humil@northwestern.edu]
- **Passcode**: [EM009710]
- **Password**: [Insert Value]
- **Confirm Password**: [Insert Value]
The GuestID login has been emailed to your guest. You must give your guest his or her password. Click “OK” and then “Return” to return to the Guest Access homepage. (30000, 1)

(Passcode length 5-16 characters. Passcode authorizes a guest for Financial Aid and Student Accounts phone support.)

*Password

(Password must be between 6-16 characters and contain at least one number.)

Confirm Password

1. Authorization for an area includes both online access to records and phone support from the appropriate NU office, except for View My Grades, My Addresses, My Phone Numbers and My Emergency Contacts, which authorize online access only.
2. 1098-T will give guests view and print access only (no access to records).
Student Center Guest Access Email

-----Original Message-----
From: d-odaniel@northwestern.edu [mailto:d-odaniel@northwestern.edu]
Sent: Friday, August 06, 2010 11:13 AM
To: s-khumkit@northwestern.edu
Cc:
Subject: Shirley EMP - Review, NU CAESAR Guest of Willie Wildcat

Dear Shirley EMP - Review,

Welcome! You have been added to the Northwestern University CAESAR Guest Center by Willie Wildcat. The Guest Center provides important University information related to this student.

To access the Guest Center:

1. Password: Your student will provide your password
2. Your GuestID : D&O941#1
3. Go to http://www.northwestern.edu/caesar
4. Log in with GuestID and password ("NetID" = GuestID).

Only the student who added you to the Guest Center can change the password. Please contact your student if you need assistance.

FURTHER INFORMATION
Further information can be found at http://ses.northwestern.edu/guestaccess/.
# Important Term Dates for New Students

<table>
<thead>
<tr>
<th>TERM</th>
<th>BILLING DATE</th>
<th>DUE DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Academic Year 2013-14</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fall 2013 <strong>New Students</strong></td>
<td>10/10/2013</td>
<td>11/01/2013</td>
</tr>
<tr>
<td>Fall 2013 <strong>Returning</strong></td>
<td>08/10/2013</td>
<td>09/01/2013</td>
</tr>
<tr>
<td>Winter 2014</td>
<td>12/10/2013</td>
<td>01/01/2014</td>
</tr>
<tr>
<td>Spring 2014</td>
<td>03/10/2014</td>
<td>04/01/2014</td>
</tr>
<tr>
<td>Summer 2014</td>
<td>06/10/2014</td>
<td>07/01/2014</td>
</tr>
<tr>
<td><strong>Academic Year 2014-15</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fall 2014 <strong>New Students</strong></td>
<td>10/10/2014</td>
<td>11/01/2014</td>
</tr>
<tr>
<td>Fall 2014 <strong>Returning</strong></td>
<td>08/10/2014</td>
<td>09/01/2014</td>
</tr>
<tr>
<td>Winter 2015</td>
<td>12/10/2014</td>
<td>01/01/2015</td>
</tr>
<tr>
<td>Spring 2015</td>
<td>03/10/2015</td>
<td>04/01/2015</td>
</tr>
<tr>
<td>Summer 2015</td>
<td>06/10/2015</td>
<td>07/01/2015</td>
</tr>
</tbody>
</table>

**Important Dates to avoid:**
Late Payment Fees $200 per term and registration delays (Financial Holds)
“Render unto Caesar the things that are Caesar's,” ... (Mark 12:17)
• Payroll Department is part of the Office of Human Resources.
  – 720 University Place, 2nd floor in Evanston
  – Abbott Hall, 8th floor in Chicago
• We pay all employees at the University including all stipends for assistantships, scholarships, and fellowships.
• Stipends are paid at the end of each month; your first payment will be September 30.
Electronic I-9/E-Verify

- Employment Eligibility Verification Form I-9 is required which requires passport, or SS card or birth certificate along with picture ID (unless a nonresident); complete section 1 online at northwestern.i9servicecenter.com and then provide documentation in your department or our office.
- Your I-9 should be fully completed by 9/20.
- If your I-9 information isn’t complete by 9/23, you will not be paid on-time.
I-9 Service Center

NEW EMPLOYEES
Start here to complete your new I-9.

Please create a Username and Password. Fields in red, with an asterisk (*) are required.

* Username: [test66]
  4 characters minimum.
  Letters and numbers only.

* Password: [redacted]

* Confirm: [redacted]
  Password must be between 6 and 14 characters. They must contain one upper case, one lowercase, one numeric and one special character. Acceptable Special Characters are @ _ # $ % ( ) * + - ~

Please retain your Username and Password in case you need to access the I-9 Service Center in the future.

Please enter your preferred email address for I-9 correspondence. It does not have to be a Northwestern email. If you do not have an email account, you can skip this step.

Email Address: [dave2020@u.northwestern.edu]

Start Date: [blank]

*School/Area: [WCAS]

*Department/Center: [2736 WCAS Applied Physics]

Start I-9
# I-9 Section 1

## Employment Eligibility Verification

**Department of Homeland Security**  
**U.S. Citizenship and Immigration Services**

**START HERE. Read instructions carefully before completing this form. The instructions must be available during completion of this form.**  
**ANTI-DISCRIMINATION NOTICE:** It is illegal to discriminate against work-authorized individuals. Employers **CANNOT** specify which document(s) they will accept from an employee. The refusal to hire an individual because the documentation presented has a future expiration date may also constitute illegal discrimination.

### Section 1. Employee Information and Attestation

*(Employees must complete and sign Section 1 of Form I-9 no later than the first day of employment, but not before accepting a job offer.)*

<table>
<thead>
<tr>
<th>Last Name (Family Name)</th>
<th>First Name (Given Name)</th>
<th>Middle Initial</th>
<th>Other Names Used (if any)*</th>
<th>Address (Street and Number)</th>
<th>Apt. Number</th>
<th>City or Town</th>
<th>State</th>
<th>Zip Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doe</td>
<td>John</td>
<td>Optional</td>
<td>N/A</td>
<td>123 Fake Street</td>
<td>Optional</td>
<td>Anytown</td>
<td>IL</td>
<td>60201</td>
</tr>
</tbody>
</table>

**Date of Birth (mm/dd/yyyy):**  
**U.S. Social Security Number:** 1234567890  
**Email Address:** john.doe@u.northwestern.edu  
**Telephone Number:** 847-401-7262

I am aware that federal law provides for imprisonment and/or fines for false statements or use of false documents in connection with the completion of this form.

I attest, under penalty of perjury, that I am (check one of the following):

- [X] A citizen of the United States
- [ ] A noncitizen national of the United States *(See instructions)*
- [ ] A lawful permanent resident *(Alien Registration Number/USCIS Number):*  
- [ ] An alien authorized to work until *(expiration date, if applicable, mm/dd/yyyy):*  
- Indefinite Some aliens may write "N/A" in this field. *(See instructions)*

For aliens authorized to work, provide your Alien Registration Number/USCIS Number OR Form I-94 Admission Number:

1. Alien Registration Number/USCIS Number:  
2. Form I-94 Admission Number:  

If you obtained your admission number from CBP in connection with your arrival in the United States, include the following:

- Foreign Passport Number:  
- Country of Issuance:

Some aliens may write "N/A" on the Foreign Passport Number and Country of Issuance fields. *(See instructions)*
FASIS Self-Service & Direct Deposit

- Direct deposit enrollment is required at [http://www.northwestern.edu/hr/policies-forms/forms/direct-deposit/DirectDeposit.pdf](http://www.northwestern.edu/hr/policies-forms/forms/direct-deposit/DirectDeposit.pdf).  
- If you don’t sign up for direct deposit a paycard is issued (no paper checks).  
- Update your address each year or whenever your address changes (FASIS and CAESAR).  
- View your paycheck stub online at [nuhr.northwestern.edu](http://nuhr.northwestern.edu). You can find all previous paystubs here also.
Taxes for Scholarship/Fellowship

- Scholarship/fellowship stipend payments to US residents will not automatically have taxes withheld but are considered taxable income and must be reported on your U.S. and state tax returns.

- If receiving payments from scholarship or fellowship, complete W-4 and IL W-4 filling in additional withholding amounts (for example $200 or $50) and later remember to remove the additional withholding if later appointed to an assistantship.

- Tuition scholarships are not taxable unless amount of scholarship exceeds tuition cost.
Taxes for Scholarship/Fellowship

- Please refer to IRS Publication 970 when completing your tax return for the rules regarding the taxability of your payments.
- You need to report your scholarship/fellowship stipend to the IRS after you make deductions for tuition, mandatory fees, and books/supplies and equipment required for attendance (save receipts).
- If you are a US citizen or permanent resident, Northwestern University will not issue you a W-2 or 1099 for your scholarship/fellowship stipend, unless you have requested a specific dollar amount to be withheld. In that case, only the withholding amounts will appear on the W-2, not your total stipend award.
Taxes for Assistantship

- Complete W-4 Federal and Illinois withholding forms because the University is required to withhold taxes from your stipend. If you do not have W-4s on file, NU will treat you as being single with zero exemptions. Therefore, NU will withhold the maximum amount allowable in taxes.
- The IRS treats assistantships differently than fellowships—you are not permitted to deduct books/supplies and equipment required for attendance from the amount you report to the IRS. Your entire earnings as a teaching/graduate assistant or research assistant will be reported to the IRS.
- Northwestern will issue a W-2 by the end of January for all assistantship payments.
• Late registration will result in Social Security and Medicare taxes withheld from your paycheck and you must submit a request for refund.
• It will show as OASDI & MED on your paycheck.
• To request a refund, you must provide a copy of your check stub from self-service and proof of your full-time enrollment.
• Refunds can take up to 30 days per check to process.
Nonresident Aliens and FNIS

- You should have already received an email request to complete our online Foreign National Information System (FNIS) which explains the process.
- Please let us know if you have not received your email.
- First, you log in and enter your data.
- Next, we send you an email within 24 hours informing you that your forms are ready to be printed and brought to the payroll office.
- When you receive this second email, bring your printed forms along with your passport, I-20 or DS-2019 to Payroll.
- **Please wait for this second email before stopping by.**

<table>
<thead>
<tr>
<th>Evanston Campus</th>
<th>Chicago Campus</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday 9-1</td>
<td>Tuesday 9-12</td>
</tr>
<tr>
<td>Tuesday 9-1</td>
<td>Wednesday 2-5</td>
</tr>
<tr>
<td>Wednesday 2-4:30</td>
<td>Thursday 9-12</td>
</tr>
<tr>
<td>Thursday 2-4:30</td>
<td>Friday 2-5</td>
</tr>
<tr>
<td>Friday 8-12</td>
<td>Friday 2-5</td>
</tr>
</tbody>
</table>
Windstar Foreign National Information System

Login

User ID

Password

Login
Tax Information for Non-Residents

- Your FNIS documents will include ALL required tax forms and tax treaty forms, if eligible.
- If you do not have a tax treaty available, you will have 14% federal tax and 5% Illinois tax withheld for scholarships and fellowships and regular federal and Illinois tax for all other types of payments.
- You must notify payroll and follow this process each time your program dates or immigration type changes.
If you will only initially be paid from a scholarship/fellowship stipend, you must apply for an ITIN on Form W-7.

Payroll will supply the application as part of the FNIS process and submit it on your behalf. You will need to provide a copy of your award letter for the ITIN application.

ITIN numbers do not arrive until November or December.
Nonresident Aliens Tax IDs-SSN

• If you will be paid by assistantship or have a temporary job on campus, you must apply for a Social Security Card yourself.
• You will need to wait until your SEVIS record is activated and apply in early October.
• The card usually takes 2 weeks to arrive.
• We must receive a copy of your SS card or number for the October payroll or there can be delays in pay.
Annual Tax Return

• Emails are sent out each January to U.S. residents who received a scholarship or fellowship to remind you of taxability.

• W2s are sent out for all assistantships (unless international student on a tax treaty) and temporary hourly jobs by January 31st.

• 1042-S are sent out for all nonresident scholarship and fellowship payments and any payment under a tax treaty by March 15th.
• General Tips
  - If you are funded on a scholarship/fellowship stipend, keep copies of your receipts for books and supplies. If you do not have receipts, use your syllabus and make notes as to the cost of books so that you have some documentation if you are audited.
  - Use Federal 1040-ES form to estimate your taxability particularly if you are on fellowship or traineeship funding for multiple years. This will allow you to either pay estimated taxes on a quarterly basis or request a dollar amount to be withheld. Just remember to change that dollar amount when you are funded on an assistantship.

• When you file your tax returns, keep a signed copy.

• If you file electronically, print a copy for your file.
Tax Information

— State tax returns follow the federal return.
  
  • Illinois residents
    — You must report any funds received in the state of Illinois on an Illinois tax return, regardless of your state of residency. Go to [http://www.revenue.state.il.us/](http://www.revenue.state.il.us/) to obtain forms and instructions.

  • Non-Illinois residents
    — Illinois has reciprocal agreements with several bordering states, so you may report your income on either state’s form. In Illinois, you will be taxed only on the income received in Illinois. Report your income using state form IL-1040NR. If you are a resident of another state, please refer to that state’s tax regulations concerning your liability. The Illinois Department of Revenue Web site offers information about the reciprocal agreements. [http://tax.illinois.gov/QuestionsAndAnswers/12.htm](http://tax.illinois.gov/QuestionsAndAnswers/12.htm)
Tax Information

- Federal Tax Resources
  - IRS publications and forms
    - Publication 970 – Tax Benefits for Education
    - Publication 519 – U.S. Tax Guide for Aliens
    - Publication 17 – Your Federal Income Tax
    - 1040-ES Estimated Tax for Individuals
    - Forms – 1040, 1040-A, 1040-EZ, 1040-NR, 1040-NR-EZ
• The Graduate Student Association (GSA) hosts a tax information session each year in the spring that will provide more details about the tax filing process.

• Please watch their website and TGS Wire for details in the spring
Graduate Assistantships

- **Assistantship Requirements**
  - **US citizens and permanent residents** are requested to file Free Application for Federal Student Aid (FAFSA) at http://www.fafsa.ed.gov.
  - **International students** must meet English Language Proficiency (ELP) requirement
    - Students whose countries of origin are Australia, Canada, New Zealand or the United Kingdom are exempt.
    - Others must take the Versant test – administered by Linguistics to new international students
    - A score of 65 or higher meets the ELP requirement
    - Speak test – administered by Linguistics to continuing students as well as those that do not pass the Versant
    - More information can be found at www.tgs.northwestern.edu/financial-aid/graduate-assistantship
Graduate Assistantships

- Assistantship Requirements (continued)
  - English as a Second Language at Northwestern
    [http://groups.linguistics.northwestern.edu/esl/](http://groups.linguistics.northwestern.edu/esl/)
    - Linguistics 380 Spoken English for Nonnative Speakers
    - Linguistics 381 Written English for Nonnative Speakers
    - ESL Tutoring
Fellowships, Scholarships and other funding

• Fellowships and Scholarships
  
  – Internal fellowship competitions
  
  – Summer language awards
  
  – External funding grants
    Americorps [https://my.americorps.gov/mp/login.do](https://my.americorps.gov/mp/login.do)
    Designated Awards
    Checks made payable to Northwestern University
    Send to: Pat Mann, Northwestern University, The Graduate School, 633 Clark Street, Crown 1-502, Evanston, IL 60208-1113
  
  – External fellowship competitions
    • Upcoming session presented by Office of Fellowships – “Fellowships, Grants and Scholarships on Somebody Else’s Nickel” 1:45 in McCormick Auditorium
Health Insurance Plans and Subsidy

- To enroll or waive your enrollment you must go into CAESAR (www.northwestern.edu/caesar) using your Northwestern University Net ID and password by October 1, 2013.
  - From the menu on the left, select For Students ==> Enrollment ==> Health Coverage Plan
  - Choose either "Option 1" to enroll in the NU sponsored plan or "Option 2" to waive.
  - Click Submit ==> Yes ==> Ok to complete your selection


- Information about the insurance plan can be found at http://www.aetnastudenthealth.com/. Enter "Northwestern University" in Get Started box. Click on “Medical Plan: Enroll” on the menu at the left side of the page. Then choose the information you need to view.
Once enrolled and charged the health cost, the subsidy will be applied to your account at various rates, depending upon your degree program and department. The subsidy will be at least 50%.

If subsidy is not applied to your account by your November billing statement, please email Pat Mann at p-mann@northwestern.edu.
**Dental Insurance**

- Northwestern University offers two comprehensive dental plans dental insurance through Cigna, an HMO and PPO. At this time enrollment for 13/14 is closed.
- The costs and plan explanations can be found at [http://www.garnett-powers.com/northwestern/student/index.htm](http://www.garnett-powers.com/northwestern/student/index.htm).
- Any questions concerning the plan, eligibility, costs, claims, etc. can be directed to Dane Pisano, the Garnett-Powers representative, at 949/583-2925, ext. 405 or [NUSDP@garnett-powers.com](mailto:NUSDP@garnett-powers.com).
- Students are responsible for the cost. The Graduate School does not provide a subsidy for dental insurance.
Other Useful Sessions

- “Fellowships, Grants and Scholarships on Somebody Else’s Nickel” 1:45 in McCormick Auditorium

- “Navigating CAESAR and the Registrar’s Office” 1:45 in the Wildcat Room

- “Graduate Student Loans for Master's Students” 1:45 in the Lake Room

- “Student Health Services and Student Health Insurance at NU” 3:45 in McCormick Auditorium
Useful Web Sites and Telephone Numbers

**Web Sites**

- Illinois Tax Publications and Forms – [http://www.revenue.state.il.us/](http://www.revenue.state.il.us/)
- The Graduate School – [http://www.tgs.northwestern.edu](http://www.tgs.northwestern.edu)
- Payroll - [http://www.northwestern.edu/hr/payroll/](http://www.northwestern.edu/hr/payroll/)
- Payroll FASIS Self-Service – [https://nuhr.northwestern.edu/](https://nuhr.northwestern.edu/)
- Office of Student Accounts / Student Financial Services – [http://www.northwestern.edu/sfs/](http://www.northwestern.edu/sfs/)
- I-9 Service Center – [https://northwestern.i9servicecenter.com](https://northwestern.i9servicecenter.com)

**Telephone Numbers**

- Internal Revenue Service
  - 1-800-829-1040 - questions
  - 1-800-829-3676 - order publications and forms
- Illinois
  - 1-800-732-8866 - automated tax assistance
  - 1-800-356-6302 - order publications and forms
Contact Information

• The Graduate School, Financial Aid
  – Pat Mann, Assistant Dean
    • p-mann@northwestern.edu
    • 847/491-8495
  – Mary MacLean, Coordinator – Graduate Assistantships
    • marymac@northwestern.edu
    • 847/491-8540
  – Michael Fernandez, Program Assistant
    • m-fernandez@northwestern.edu
    • 847/491-7334
  – Fax: 847/491-5070

  – Address:
    • 633 Clark, Rebecca Crown Center 1-502, Evanston, IL 60208-1113
Contact Information

• Office of Student Accounts

  – Evanston Campus:
    • **Address:** 555 Clark Street, 1st Floor, Evanston, IL 60208-1221
    • **E-Mail:** studentaccounts-ev@northwestern.edu
    • **Telephone:** 847/491-5224

  – Chicago Campus:
    • **Address:** 710 N. Lake Shore Drive, 120 Abbott Hall, Chicago, IL 60611-3078
    • **E-Mail:** studentaccounts-chicago@northwestern.edu
    • **Telephone:** 312/503-8503

  - **Additional Information:** [http://www.northwestern.edu/sfs](http://www.northwestern.edu/sfs)

  **Hours:** 8:30 a.m. – 5 p.m., Monday – Friday (Please sign in at the front desk)
Contact Information

- **Payroll**
  - E-Mail Address
    - payroll@northwestern.edu (Payroll Questions)
    - i9help@northwestern.edu (I-9s and E-Verify)
  - Telephone:
    - Evanston Campus: 847/491-7362
    - Chicago Campus: 312/503-9700
  - Addresses:
    - Evanston Campus: 720 University Place, Evanston, IL 60208
    - Chicago Campus: 710 North Lake Shore Drive, Abbott Hall, Room 850, Chicago, IL 60611
THANK YOU.
Have a great year!!!