CatLink

TouchNet

Electronic Statement & Payment Center

CATAWBA
COMMUNITY PORTAL

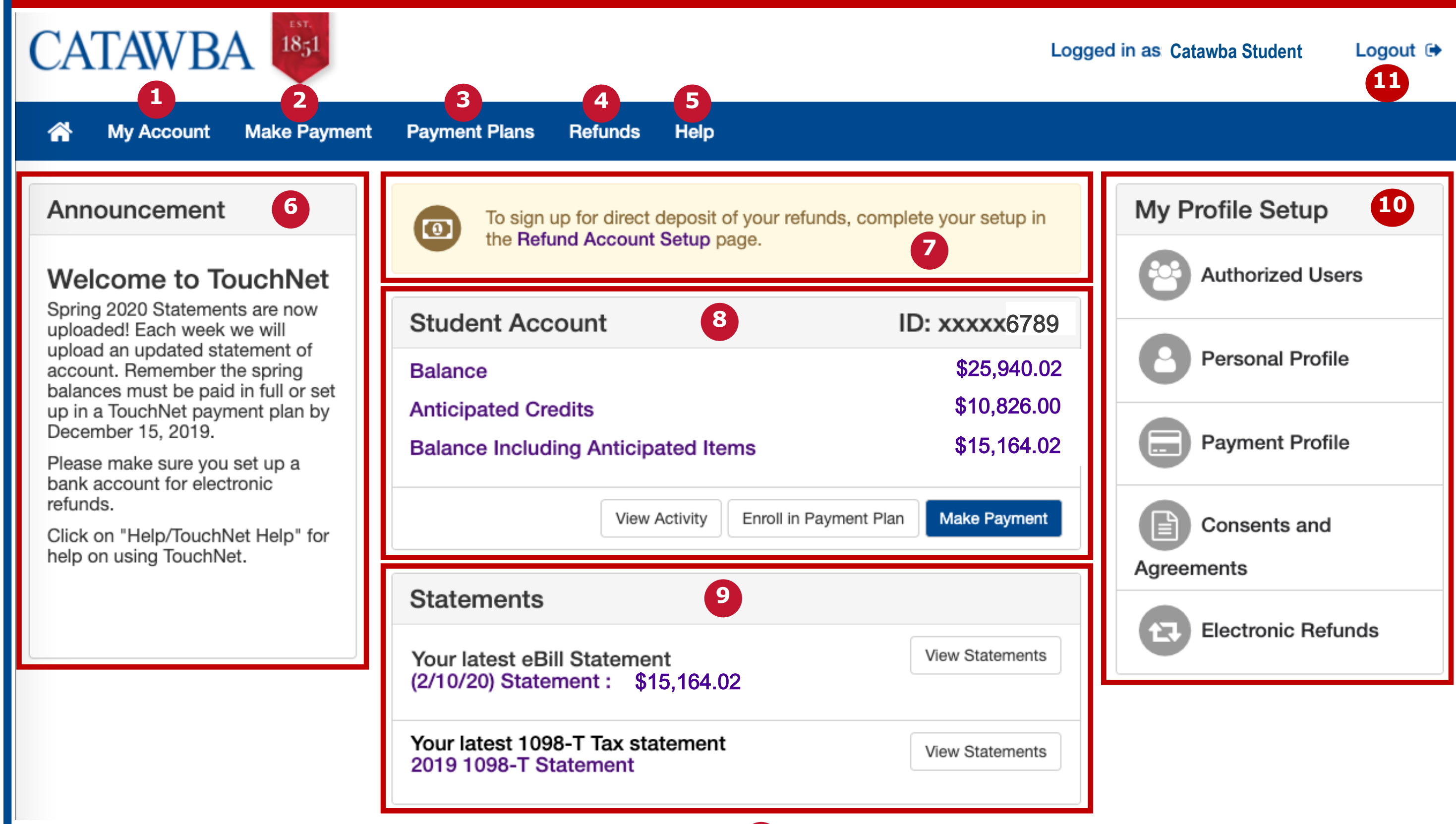
STUDENT Quick Reference Guide

Need help? Send text or email to touchnet@catawba.edu or call the Business Office at 704-637-4388

Login to CatLink, click the Money tab, click the blue "Launch TouchNet" button

NOTE: **TouchNet** times out after 15 minutes of no activity — if it times out, close screen and login to **CatLink** again to access **TouchNet**

HOME screen



1 My Account

- **Current Activity** — See historical activity by term of transactions that have posted as well as current unposted charges and credits for your account
- **Statements** — All of your statements, along with the amount due and link to detail
- **Payment History** — Any payments that have already been made

2 Make Payment — Make a full or partial payment to your account

3 Payment Plans — View your current payment plan, or enroll in a plan to pay your balance over time

4 Refunds — Add an account to receive refunds quickly, and see a history of your past refunds

5 Help — See your options for finding help with questions about your student account

6 Announcement — See the Announcement area for information about your campus bills and payment

7 Account Alerts — Watch this space for important messages about your account

ADDITIONAL NOTES

♦**Charges and credits** are available real-time; anticipated charges and credits are updated nightly.

♦**New statements** will be generated at least once per week in the weeks before and at the start of each term. New statements will be generated at least once per month at other times. **TouchNet** statements will be retained for 12 months.

♦**Authorized users** will be sent an email with an ID and instructions on how to login to **TouchNet** (they will not use **CatLink**).

8 Student Account

- **Balance** — Actual charges and credits that have been applied to your account
- **Anticipated Credits**♦ — Funds you expect to receive (loans, financial aid, etc.) that have not been applied to your account
- **Balance Including Anticipated Items** — The total balance, after including Anticipated Charges and Anticipated Credits
- **View Activity** — See historical activity by term of transactions that have posted as well as current unposted charges and credits for your account
- **Enroll in Payment Plan** — If your balance is eligible for a payment plan, follow the link to enroll
- **Make Payment** — Follow this link to make a payment towards your balance

9 Statements♦ — Your account statements are listed here; click a description to see the details; notice that your **1098-T tax form** can be accessed here (see reverse for more information)

10 My Profile Setup

- **Authorized Users**♦ — Give others (like parents) permission to view and pay your bills
- **Personal Profile** — Add or edit a secondary email address to get updates and notifications about your account
- **Payment Profile** — Add a payment method to your account to make future payments quickly
- **Consents and Agreements** — View a digital copy of your TouchNet consent forms and agreements
- **Electronic Refunds** — Add, modify, or delete a checking or savings account for direct deposit of your refunds

11 Logout — Always click **Logout** when you finish to ensure the privacy of your account information

Check your ACTIVITY

1. Click **My Account** > **Current Activity** from the menu (or click **Balance** in the **Student Account** area on the **Home** screen)
2. Click the term you wish to view — you will then see **Anticipated Charges**, **Anticipated Credits**, and **Account Activity**

- *Actual (posted) charges and credits are available real-time; anticipated charges and credits are updated nightly.*
- ***Account Activity** has options for Print, view in Excel spreadsheet format, or view as a PDF.*
- *Other options on Account Activity include Search or Sort (by Description, Date, or Amount).*

Make a PAYMENT

1. Click **Make Payment** on the menu
2. Click in the box at right and enter amount you wish to pay, then click the blue **Continue** button
3. Click the drop-down arrow and **Select Method***, then **click the Select button**
4. After completing information fields for your selected payment method, an Account Payment summary screen appears — review your information, then click **Submit Payment** (or Back or Cancel, if desired)
5. After the payment processes, a Payment Receipt screen appears with details of your transaction — you will also receive a copy of the receipt via your email address(es)

**Currently, three (3) payment methods available:*
- *Electronic Check (checking/savings) — option to save checking/saving payment method(s) with a specified name (i.e. My Checking); no additional cost for using the Electronic Check option*
- *Credit/Debit Card via PayPath — a 2.75% service charge convenience fee will be charged*
- *Bank Wire (via Western Union) — only for international students*

REFUNDS

1. Click **Refunds** on the menu, or click **Electronic Refunds** from **My Profile Setup** (right side of **Home** screen)
2. An **Account Information** pop-up window appears—enter your checking or savings account information, then click the blue **Continue** button (or Cancel if desired)
3. A **Refund Account Agreement** will appear on the screen—read the agreement and click "I agree" checkbox if you agree, then click the blue **Continue** button (or Print Agreement or Cancel, if desired)
4. The eRefunds page will reappear — you may Update or Remove a refund account by clicking the gear icon at right
5. You may also view **Refund History** on the eRefunds page

You are encouraged to set up your eRefunds account now; however, please be advised that any refunds due to you will continue to be processed as paper checks until mid-January, 2018.

Set up an AUTHORIZED USER

1. Click **Authorized Users** in the **My Profile Setup** area on the **Home** screen
2. Click **Add Authorized User**
3. Enter the email address of person you wish to add as an Authorized User, make your selections on the two permission questions, then click the blue **Continue** button (or Cancel if desired)
4. An **Agreement to Add Authorized User** will appear on the screen—read the agreement and click "I agree" checkbox if you agree, then click the blue **Continue** button (or Print Agreement or Cancel, if desired)
5. The **Authorized Users** page will reappear — you may Edit, Delete, or Show Agreement for a Current Authorized User by clicking the gear icon at right

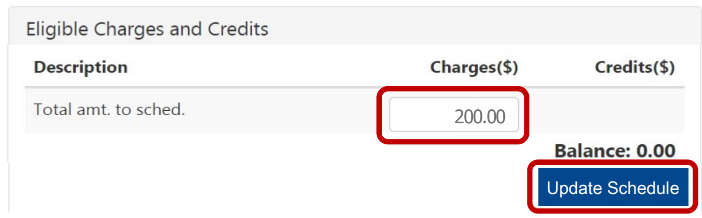
View & print your STATEMENT

1. In the **Statement** area on the **Home** screen, click **Statement** link or **View** button
2. Click drop-down and **Select the statement to view**, then click the **View** button — the **Statement of Account** will open in a new window
3. Press **Ctrl-P** or **File > Print > OK** to print the statement

- *For help understanding the statement, please go to catawba.edu/statement*
- *If you have questions about any items on the statement, contact the appropriate department listed at numbers on the statement.*

Enroll in a PAYMENT PLAN

1. Click **Payment Plans** on the menu
2. Click the blue **Enroll Now** button
3. Click the drop-down arrow and **Select Term**, then **click the Select button**
4. Three (3) payment plan options are displayed along with fees, etc. Click the **Details** button to see additional information about a plan, click the blue **Select** button to make your plan choice
5. Enter the total amount you wish to schedule for a payment plan in the **Charges($)** box. Click anywhere outside the box (or press Tab key), then click the blue **Update Schedule** button



6. The screen will be updated with your **Payment Schedule** showing dates and amounts due (the $35 Setup fee will be Due now)
7. Click the blue **Continue** button (or Back or Cancel, if desired)
8. Click the drop-down arrow to **Select Method*** to pay the $35 Setup fee, then **click the Select button**
9. Follow on-screen payment method steps for completing your **Payment Plan** (see **Make a Payment** steps for more information on payment methods)

- *Students must enroll in a new plan each semester that they use a payment plan.*
- *The one-time $35 plan fee is due when a student enrolls in a plan.*
- *The student will be required to set up auto-payments using electronic checking (ACH) or a credit/debit card for installment payments.*
- *If the due date(s) for any installments have passed when a student enrolls in a plan, all of those installment amount(s) will have to be paid at the time of enrollment.*
- *After the "last day to add" of each term, installments will be automatically recalculated (up or down) as appropriate due changes in charges or credit. Students will receive notification via email each time installments are recalculated.*
- *Once enrolled, a $20 late fee will be assessed on installment payments made after the due date.*
- *A payment plan may be terminated for failure to make an installment payment according to the plan agreement.*

Access your 1098-T TAX STATEMENT

Families filing a U.S. tax return may be eligible for educational tax credits when claiming their Catawba College student as a dependent. The IRS form 1098-T is the form provided to help file for these tax credits. In January, Catawba College mails a copy of the 1098-T to each student who had reportable data for the prior year; students may also access and print their 1098-T form via TouchNet.

1. In the **Statement** area on the **Home** screen, click the **View** button or click the **1098-T** link
2. A PDF copy of your **1098-T** will open — click the printer icon at the top of the screen or press Ctrl-P to print

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