University of Massachusetts Amherst - Bursar's Office

New Parent Billing Checklist

Congratulations and welcome to the University of Massachusetts Amherst! This checklist is designed to be a guide to get you and your student ready for the University's student billing system. Complete this checklist today to guarantee you are ready for your first University e-bill which will be available online.

☐ Make sure your student completes the 'New Student Checklist' on the opposite side of this paper.

☐ Complete the FAFSA application for each Academic Year. This is required for Financial Aid awards, including the John & Abigail Adams Scholarship and the Koplick Tuition Waiver. More information can be found on the website www.fafsa.ed.gov.

☐ Work with your student to submit or complete any outstanding 'To Do' items related to his/her financial aid award (see New Student Checklist for more information).

☐ Complete the Health Insurance waiver online if your student is covered under a parent's qualified health insurance plan. To do so, visit the SPIRE logon page at www.spire.umass.edu and click on the 'Health Insurance Waiver' in the lower right corner, then click on the waiver tab. The website will be available in mid-July, the waiver deadline date is the end of the fall add/drop period http://www.umass.edu/registrar/calendars/academic-calendar.

☐ Check your student's bill online. Students and Authorized Payers are sent an email when bills are available to be viewed online. Fall and Spring bills are available in July and December respectively. More information about Authorized Payers can be viewed on our website at: http://www.umass.edu/bursar/sites/default/files/Authorized%20Payer.pdf

☐ Sign up for our UPay Payment Plan online in QuikPAY. You may enroll in our monthly installment payment plan (10 installments for the annual plan; 5 installments for a single semester plan) through your Authorized Payer access at: https://quikpayasp.com/umass/bursarbill/authorized.do. The deadline for enrollment is the first day of classes.

☐ Check the Bursar's Office website at www.umass.edu/bursar/ for more information regarding these checklist items and all billing related topics.
New Student Billing Checklist

Congratulations and welcome to the University of Massachusetts Amherst! This checklist is designed to be a guide to get you and your parent(s) ready for the University's student billing system. Complete this checklist today to guarantee you and your parent(s) are ready for your first University e-bill which will be available online.

☐ Waive your FERPA restriction to allow our office to discuss your student BILL with your parent(s) or guardian(s). Without this waiver, we cannot discuss any financial matters with anyone other than you. To complete this waiver, log in to your SPIRE.

   Navigation: Main Menu → My Personal Information, then FERPA Privacy Waiver.

   You will assign each parent/guardian a 4 character code which they must provide when contacting the Bursar’s Office. More information about this waiver may be found at www.oit.umass.edu/support/spire/set-up-your-ferpa-privacy-waiver.

☐ Designate your parent(s) or guardian(s) as an Authorized Payer. As an Authorized Payer, your designees will be notified each time a billing statement is available online; they can view your current and past billing statements as well as current billing activity, pay your bill online or sign up for the UPay Payment Plan. To designate one or more Authorized Payers, access the QuikPAY online billing system through your SPIRE access:

   Navigation: Main Menu → Finances View/Pay Bill then Authorize Payers

   Input your Authorized Payer's email address, assign them a temporary password and tell them what it is. Authorized Payers will receive an email with instructions on how to log in.

☐ Enroll in Excess Express, our student refund direct deposit program. If your bill is overpaid, we will issue you a refund electronically to the bank account of your choice. In order to receive a refund, you must enroll in Excess Express.

☐ Complete the Health Insurance waiver online if you are covered under a parent’s qualified health insurance plan. To do so, visit the SPIRE logon page at www.spire.umass.edu and click on the 'Health Insurance Waiver' in the lower right corner. The website will be available mid-July and the waiver deadline date is the end of add/drop http://www.umass.edu/registrar/calendars/academic-calendar

☐ Check your bill online. You may view and pay your bill online through your SPIRE account by clicking the View/Pay Bill link on the Student Services Center page.

   Navigation: Main Menu → Finances → View/Pay Bill

☐ Complete any outstanding ‘To Do’ items listed on your SPIRE Student Services page. ‘To Do’ items are listed on the right hand side of the page. Information about Financial Aid is available at www.umass.edu/umfa.

☐ Check the Bursar’s Office website at www.umass.edu/bursar/ for more information regarding these checklist items and all billing related topics.