

Heritage University: Student Journey — Enrollment and Payment Process

I. Inquiry and Application Stage

1. Inquiry & Application

- Student submits an online application or inquiry (undergraduate or graduate).
- Admissions follows up on missing materials and tracks completion.
- Applicant receives acceptance via email and hard copy.
- Admissions issues MyHeritage login credentials.

2. Intent to Enroll

- Accepted student confirms intent to attend.
- Admissions triggers advisor assignment (AD → RE phase).
- Admissions counselor schedules appointment with advisor.

3. Financial Aid Initiation

- Student completes FAFSA or WASFA and any required verification.
 - Financial Aid packages awards and notifies student (email + hard copy).
 - Student accepts or declines awards.
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II. Advising and Course Registration

1. Advisor Assignment

- Admissions connects student with a first-year advisor based on characteristics (e.g., first-gen status, major, other criteria).

2. Initial Advising Meeting

- Advisor reviews placement scores, transcripts, and holistic checklist (technology, transportation, work hours).
- Advisor helps student challenge or adjust course placements (Math/English testing as needed).

- Advisor ensures student can access MyHeritage and email.

3. Course Registration

- Advisor assists student in building a schedule.
 - Advisor registers student and provides class confirmation and book ordering guidance.
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III. Orientation and Pre-Semester Preparation

1. Orientation

- Full-day New Student Orientation (2–3 weeks before semester start).
- Covers MyHeritage use, financial aid, campus resources, and book ordering.
- Includes tabling from IT, Financial Aid, and Holds resolution.

2. Hold Resolution

- Student checks for holds in MyHeritage.
- Holds resolved in coordination with Financial Aid, Student Accounts, Registrar, and Admissions.

3. Technology and Access Setup

- Student activates HU email, MyHeritage, and payment portal.
 - Registrar moves students from “pre-registered” to “current” two weeks before term start.
 - Unresolved holds dropped before the 100% refund deadline.
 - Preliminary financial aid and book credits available once prelim aid is confirmed.
 - **Need:** process for communicating course fees.
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IV. Payment and Account Management

1. Billing and Payment Plans

- Preliminary charges appear ~10 days before semester start.
- Actual charges finalized after drop date.

- Financial Aid applied once finalized.
- Monthly student statements issued on the 15th (including zero-balance or refund notices).
- Payment options: pay in full, monthly plan, or third-party sponsorship.

2. Scholarships and External Aid

- Financial Aid and Student Accounts coordinate to ensure proper posting.

3. Refunds and Balances

- Refunds disbursed after actual aid and charges are applied.
 - Balance visible on the monthly statement (15th).
 - **To confirm:** whether J1 sends automatic balance notifications.
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V. Start of Semester and Ongoing Enrollment Support

1. First-Week Confirmation

- Registrar and Retention confirm attendance and engagement during Week 1.
- Attendance data shared with Financial Aid and Student Accounts before disbursements/refunds.
- Retention monitors early alerts.

2. Add/Drop Period

- Students may add/drop classes during Week 1 (with or without advisor).
- Students may drop classes during Week 2 (with advisor).
- Waitlisted students added only through last add date; removed from waitlist completely afterward.
- Financial Aid and Student Accounts recalculate aid/charges as needed.

3. Continuous Communication

- Retention monitors alerts from faculty.
- Students receive reminders about payment deadlines and account balances from Student Accounts.

VI. Payment Review

- Accounts Office issues balance updates and reminders monthly (on or near the 15th).

VII. Special Scenarios

- **Complete Withdrawal during semester:** Financial Aid manages R2T4 and Washington College Grant adjustments; Student Accounts communicates resulting balance.
- Aid and charges prorated; advisor follows up to discuss retention plan.