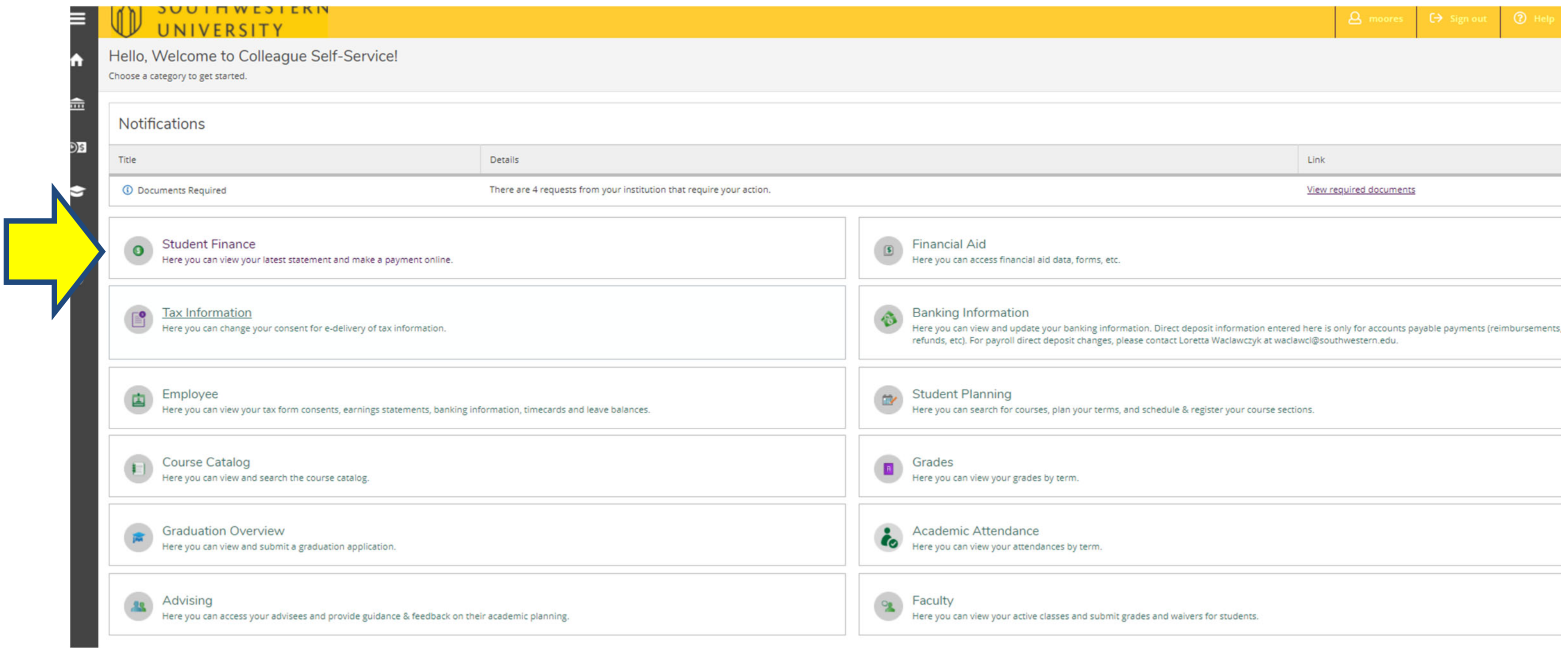
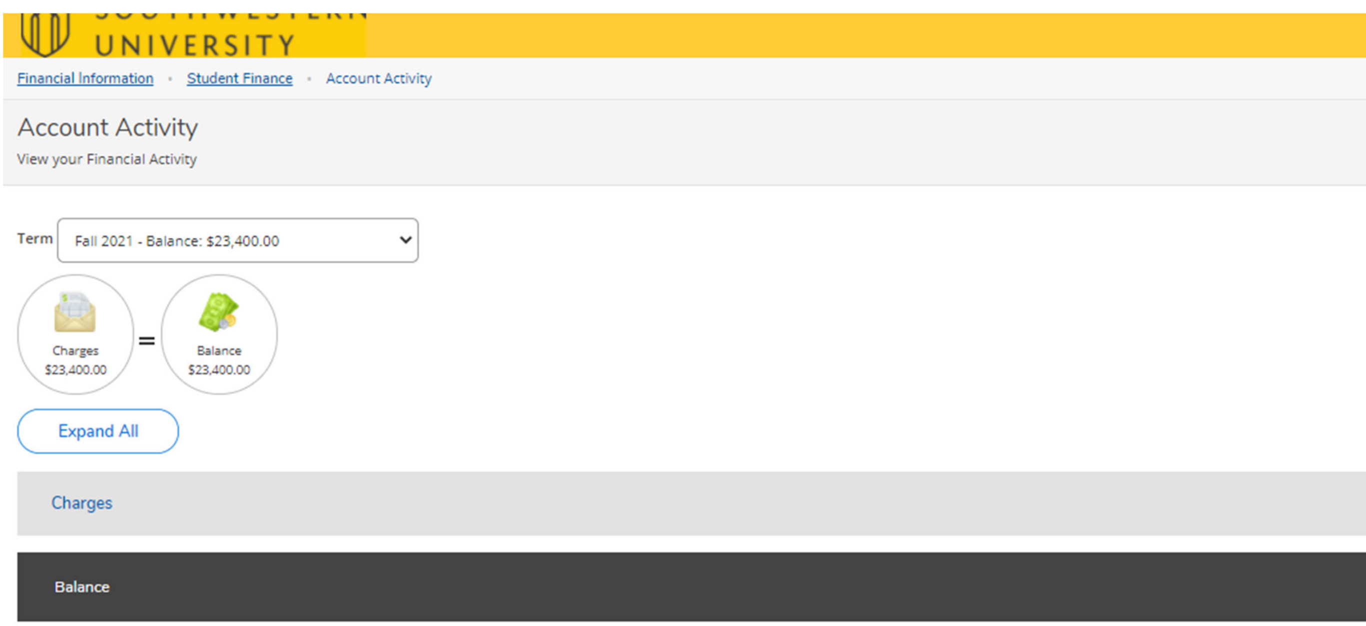
# Accessing On-Line Student Account Detail & Transact Payments Portal

**Students must log into their SU Self Service account to access the screen below.**

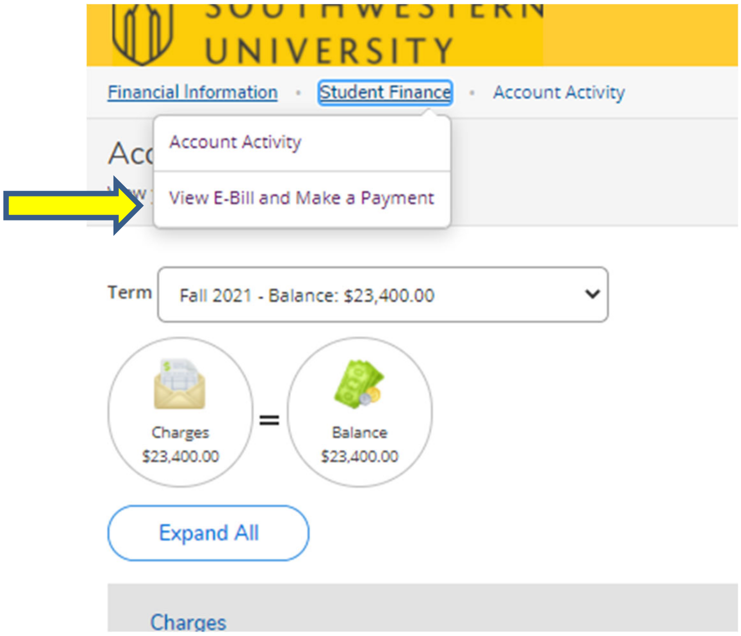



**The student account links are found in the "Student Finance" section:**




- **The term balances mentioned here are current, term based, real time and do not reflect confirmed financial aid that has not been disbursed yet.**

- **The "View E-Bill and Make a Payment" link is used to access e-bills, make ACH and credit card payments, set up or change Payer access, enroll in and manage payment plans, see recent on-line payments, and set -up or change text or email notifications.**



## <u>“View E-Bill & Make a Payment ” link</u>

- **To continue to the student account Transact Payments Portal, the link “Student Account Information” must be selected.**

SOUTHWESTERN
UNIVERSITY

Financial Information • Student Finance • View E-Bill and Make a Payment

# View E-Bill and Make a Payment

Click on the link below to be connected to Transact Payments to access your Southwestern University student account information to do the following:

- View your Electronic Statements (E-bills)
- View your account balance by term & make an ACH or Credit Card payment
- Make an International payment
- Enroll in a monthly Payment Plan
- View your recent payments made on-line
- Set-up & manage Parent or Authorized user PINs
- Manage any saved ACH or credit card payment methods

In order for your parent or other designated person to be able to access your student account information, **you must first send a payer invitation to the individual by going to the "My Account" section in the top left corner of the next page & completing the invitation process.** Once you have completed the set-up process, the authorized individual will be sent an email with their ID, temporary password, and the necessary link to access your account. Authorized users will only have access to see E-bills, to see account balance and payment history, to make payments on the account, and to set up their own email and text notifications. They do not have access to financial aid, grades, or other online student information.

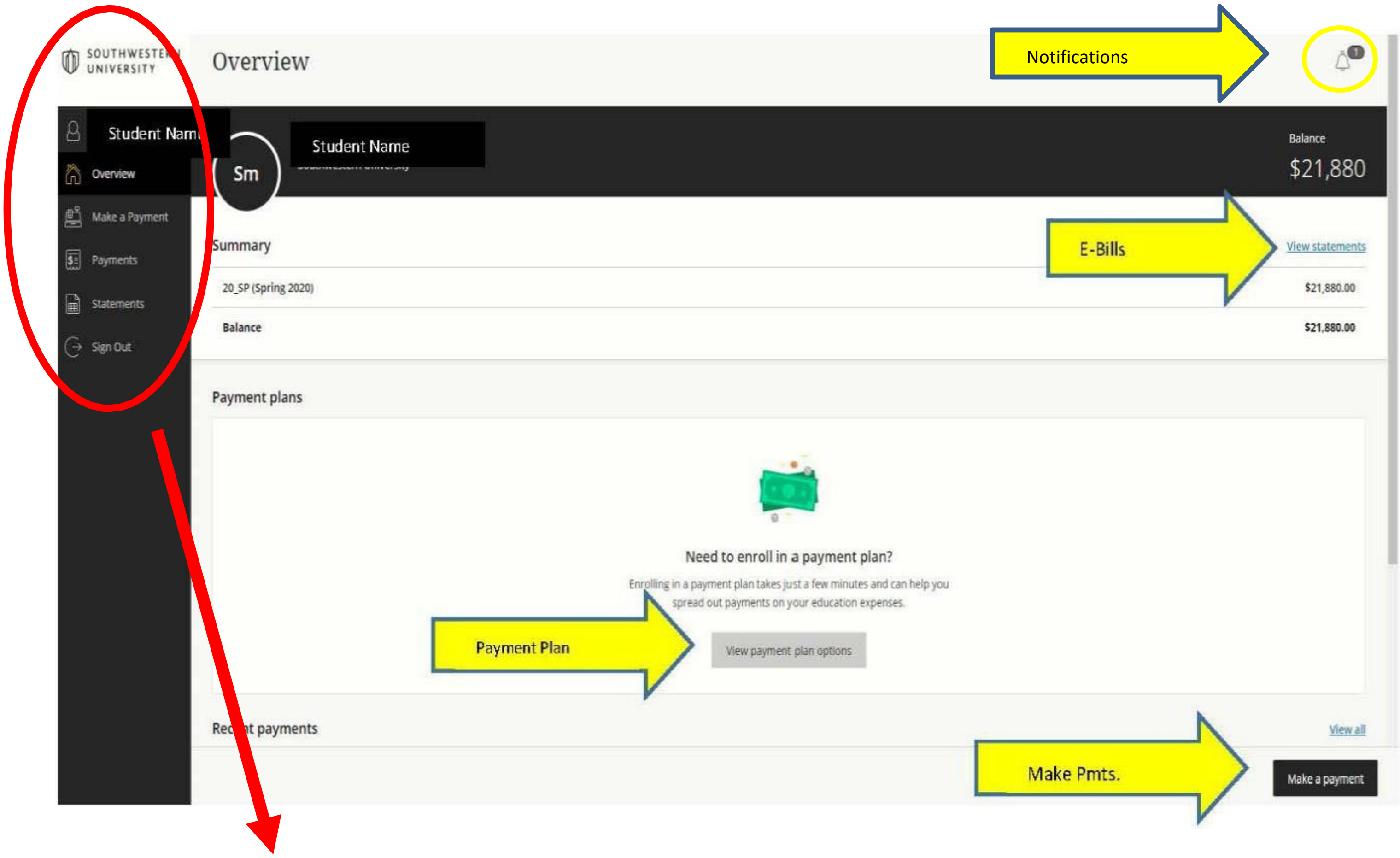
**Continue to** Student Account Information

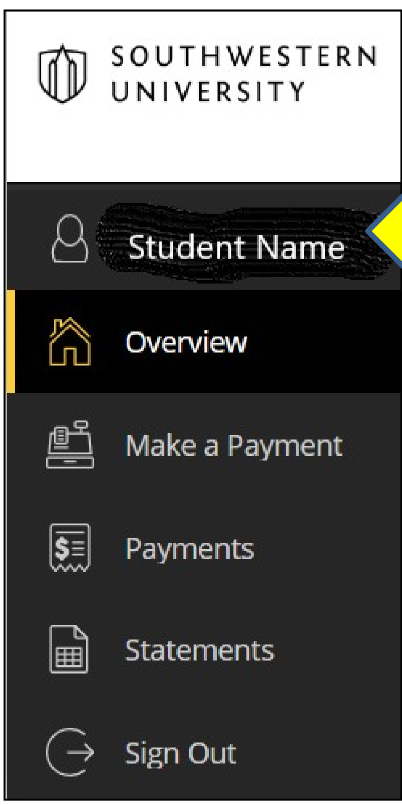
## Wire Transfers via Western Union Business Solutions

- International payments can be made in Transact Payments using the link above.
- Those wishing to make payments to the student account via wire transfer or international electronic transfer using Western Union Business Solutions GlobalPay for Student should select the following link: Western Union

- **Selecting the link above will take you to your student Transact Payment Portal main screen to do the following things: (See next page for picture of the screen layout.)**
  - ✓ **View account balance by term**
  - ✓ **Access E-bills**
  - ✓ **Make ACH or credit card payments**
  - ✓ **Make international payments**
  - ✓ **Enroll in the SU Payment Plan**
  - ✓ **View previous ACH or credit card payments made on-line**
  - ✓ **Manage any saved ACH or credit card payment methods**
  - ✓ **Set up or change text and email notifications**
  - ✓ **Give or remove Payers' access to e-bills and to make payments**
  - ✓ **Manage or make future payment plan payments**

# Student Transact Payment Portal Overview Screen




**Click NAME to access payers, saved payment methods, contact information, and notifications.**

**On the Transact Payments Portal Overview Screen, navigate either by using the menu options listed on the left side menu bar or use the other options shown at various places on the screen.**

**Please see the following pages for explanations for the Overview Screen and Payers section.**

# Overview Screen

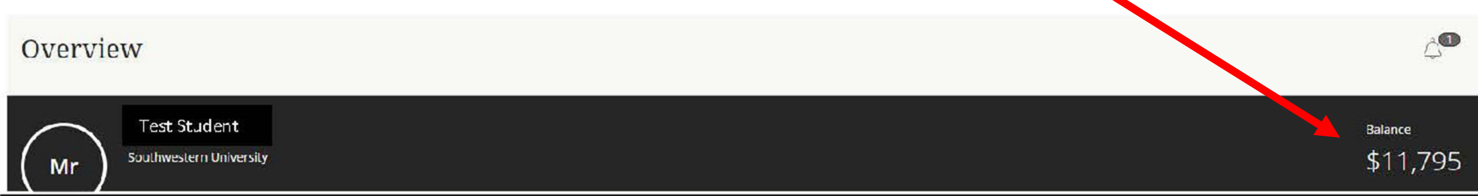
As shown on previous page, the overview screen is the default screen after log-in.

1. **Notification Section –**


- This section appears in the top right section of your screen.
- Some messages will automatically appear when you log in to your payment portal.
- Notifications will include important information about your account or holds placed on your account if applicable.
- Simply click the icon to view any messages that are present.

2. **Balance & Summary Section & Access Statements–**

- The overall student account balance appears at the very top in the black bar after the student name. This amount is the actual total balance due for all semesters on the student account.




- The Summary section then shows you the balance due by each term if applicable.

| Summary | View statements |
|---|---|
| 20_SP (Spring 2020) | $102.00 |
| 19_FA (Fall 2019) | $279.00 |
| Balance<br>*Minimum due* | $381.00<br>*$381.00* |

- Please note that the balance shown is after the deduction of confirmed financial aid. Pending aid such as outside scholarships are not factored into the amount seen.

- There is also a blue link in this section, “view statements,” that allows you to view the related statements.

| Summary | View statements |
|---|---|
| 20_SP (Spring 2020) | $102.00 |
| 19_FA (Fall 2019) | $279.00 |
| **Balance** | **$381.00** |
| *Minimum due* | *$381.00* |

## “Statements” Section –

Statements

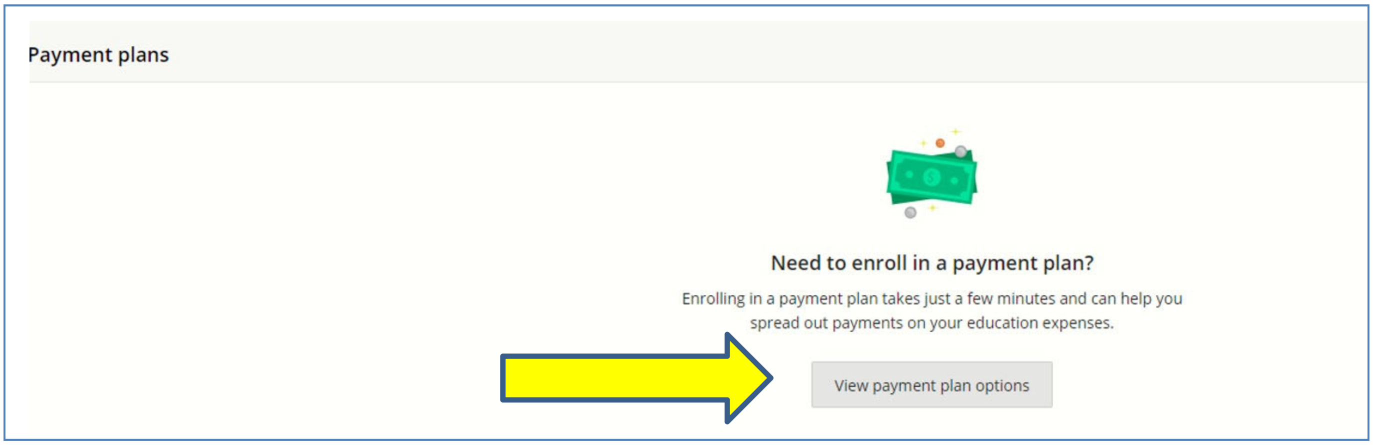
| Date | Description | View | Save |
|---|---|---|---|
| 12/2/19 | SWU Bill | | |
| 11/14/19 | SWU Bill | | |
| 7/9/19 | SWU Bill | | |
| 6/27/19 | SWU Bill | | |
| 4/26/19 | SWU Bill | | |
| 11/30/18 | SWU Bill | | |
| 11/9/18 | SWU Bill | | |
| 7/5/18 | SWU Bill | | |
| 5/1/18 | SWU Bill | | |

- This section is where you will view your most current and prior e-bills.
- Please keep in mind that e-bills are static in time based on the date of the e-bill and do NOT reflect real-time account balance changes. Students can access current student account detail updated every 24 hours by using the “Account Detail” link in WebAdvisor.
- Students will receive an email to their SU email account notifying them when a new e-bill is available! Reminder emails will also be sent if the e-bill is never viewed.
- **Parents or other authorized payers will also be sent an email notification regarding e-bills if the notification is turned on.**

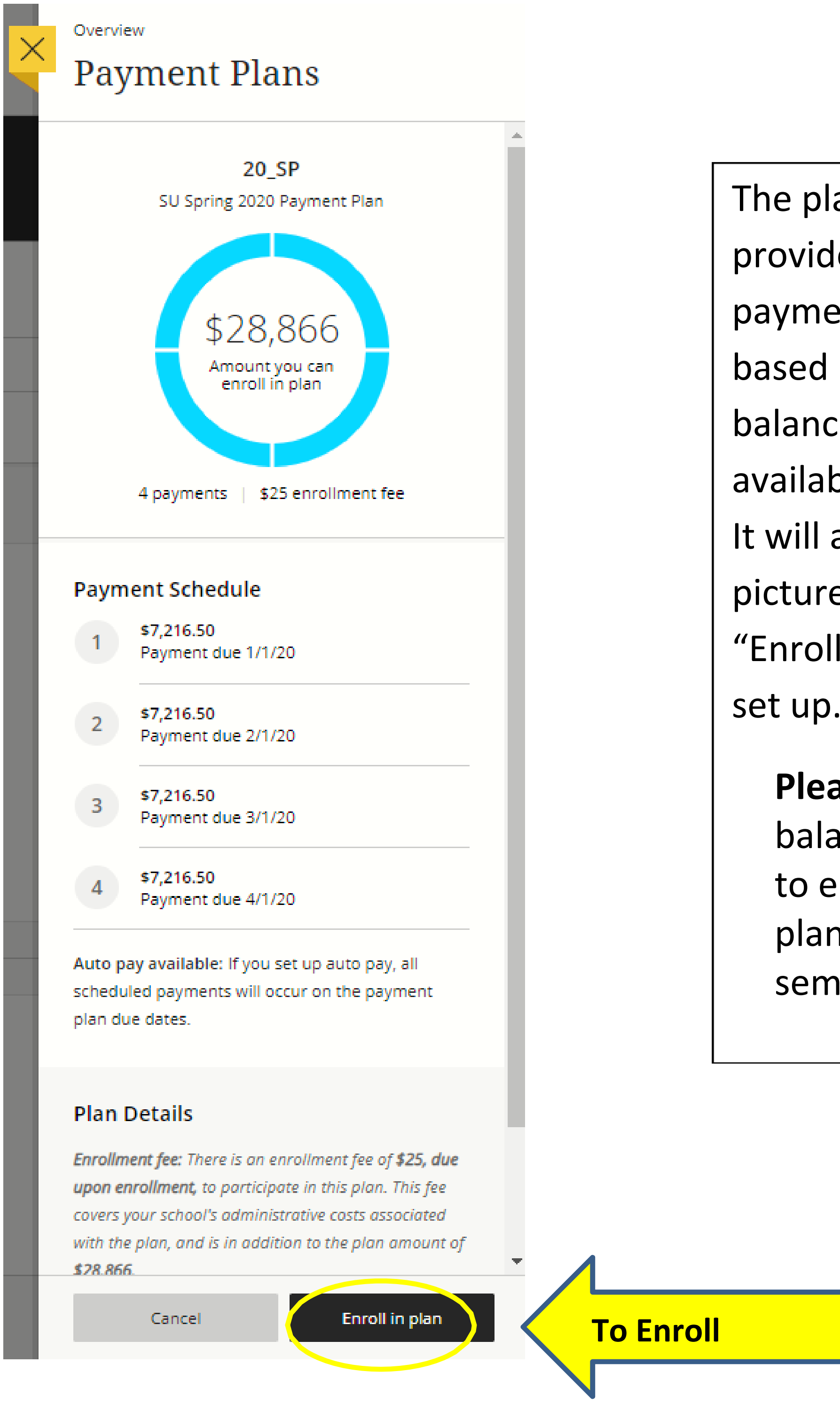
## 3. Payment Plan Section

### A. Enrolling in a NEW Payment Plan

- If a balance is owed, this section will appear in the middle of the screen below the Summary balance to allow enrollment in the SU Payment Plan.
- Click the link that says "View Payment Plan Options" to sign up for a payment plan for that term.



- After the link is clicked the following sidebar will appear:

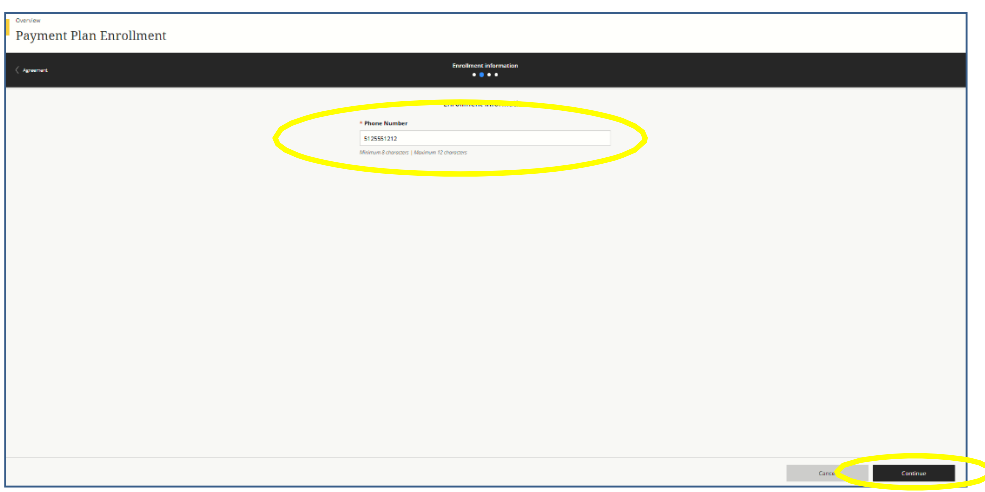



The plan will automatically provide you the breakdown of payments and the due dates based upon your account balance and which plan is available at time of signing up. It will also give you a broad picture of the terms. Choose “Enroll in plan” to continue the set up.

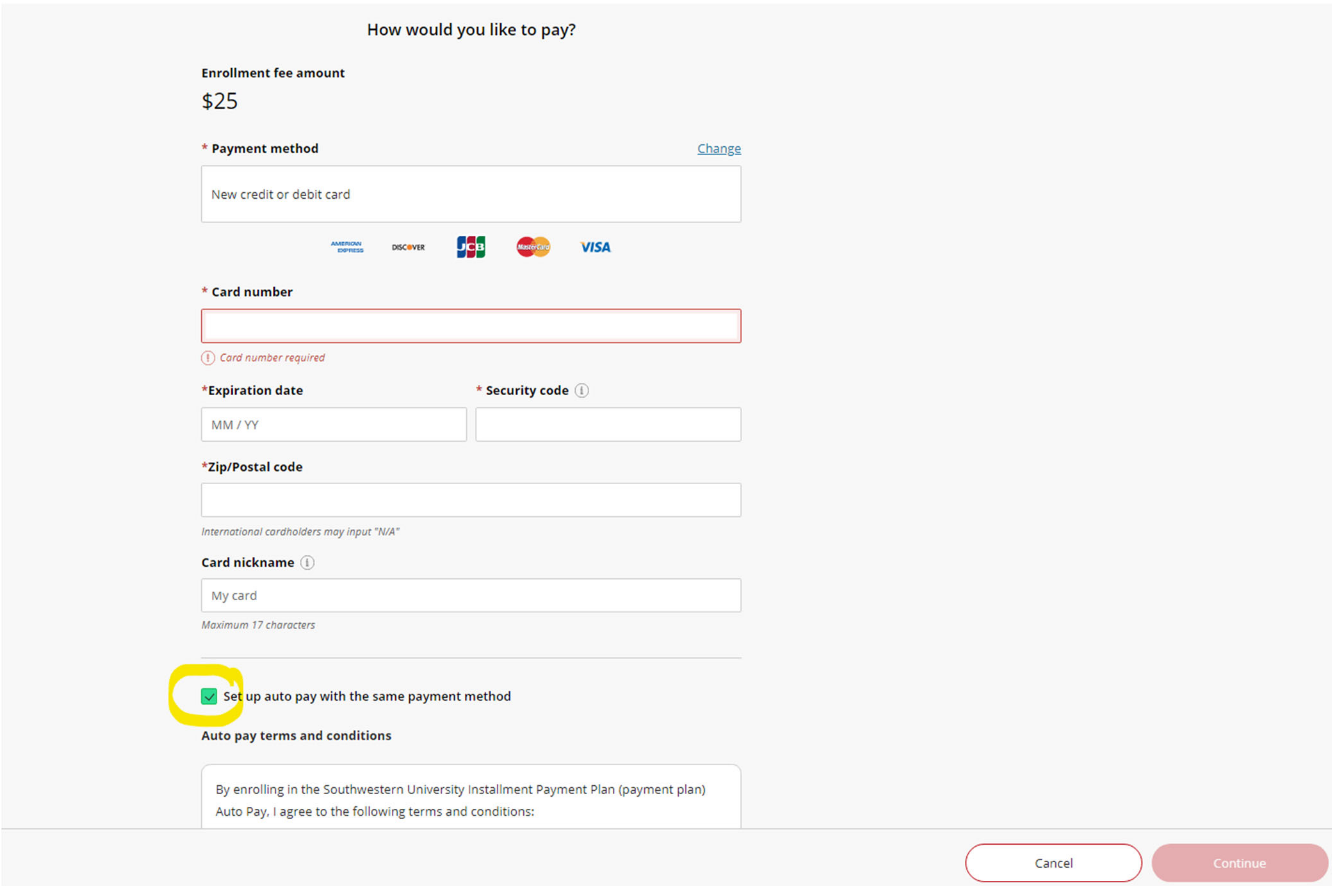
**Please note:** All prior term balances must be paid prior to enrolling in the payment plan for the current semester.

- After selecting “enroll in plan”, the terms and conditions of the plan will be listed, as well as the payment dates. You must read and accept the terms and conditions before the payment plan can be completed by first selecting the check box at the bottom of the screen and then selecting the “continue” button.


- The next screen will ask for a phone number.



- Finally, there is a $25 payment plan fee that must be paid before completing the plan set up. You will be given the option of paying by credit card or electronic check. If you have saved payment methods these will also be listed in the drop-down menu.
- Warning- The default is that the payment plan will assume you want to use the same payment method you are using to pay the $25 for your monthly payments. If you are fine with this, then proceed on. If you want to not have a payment automatically withdrawn on the 10th of each month from this account, uncheck the box that is circled below.




- Before submission you will be asked to confirm the information is correct. To confirm and complete enrollment click on the “Pay $25” link at the bottom right corner.

Review

Last step! Let's make sure we have your correct information.

| | |
|---|---|
| **Email address** | emailaddress@email.com |

*All notifications regarding this payment plan will be sent to the email address(es) saved in your profile.*

## Summary

Change

**20_SP: SU Spring 2020 Payment Plan**

Enrollment fee $25

## Payment details

Change

| | |
|---|---|
| **Account holder name** | Name of Account owner |
| **Account type** | Savings |
| **Bank account number** | ••••••4499 |
| **Saved payment method** | ZhangSaving |

## Enrollment information

Change

| | |
|---|---|
| **Phone Number** | 5125551212 |

This site is protected by reCAPTCHA and the Google Privacy Policy and Terms of Service apply.

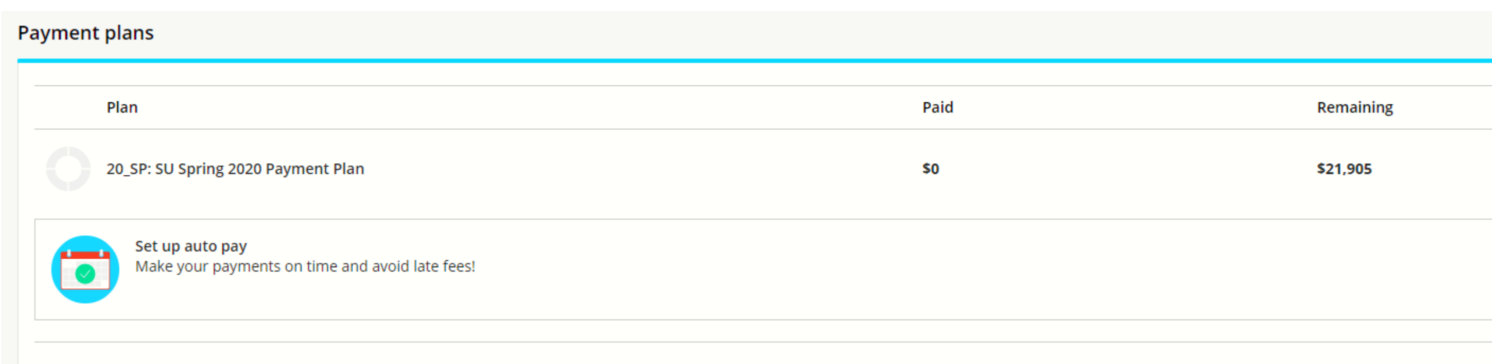
Cancel

Pay $25

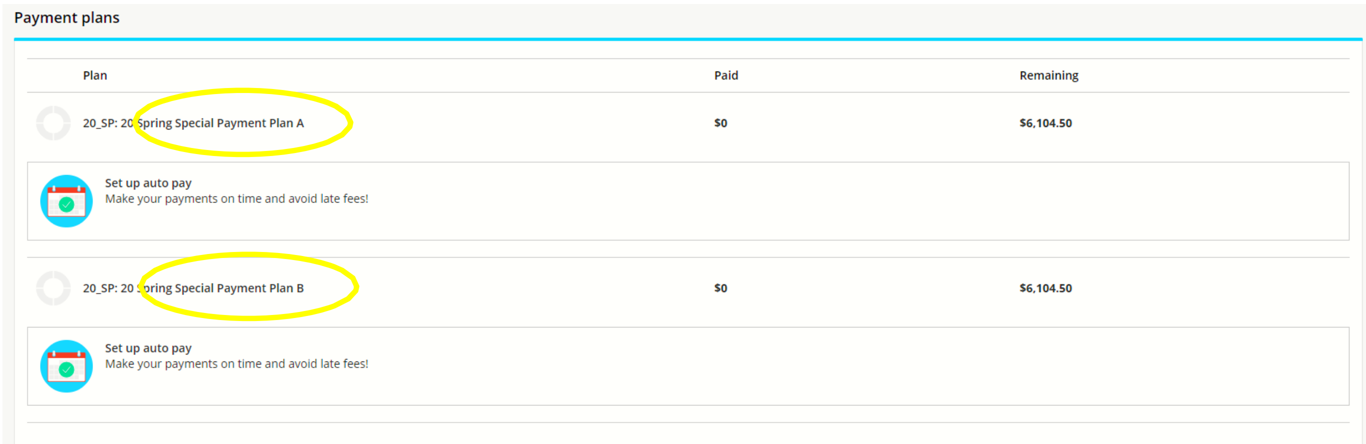
- After completion an email with the terms and conditions will be sent to the email address listed.


## B. Managing an Existing Payment Plan

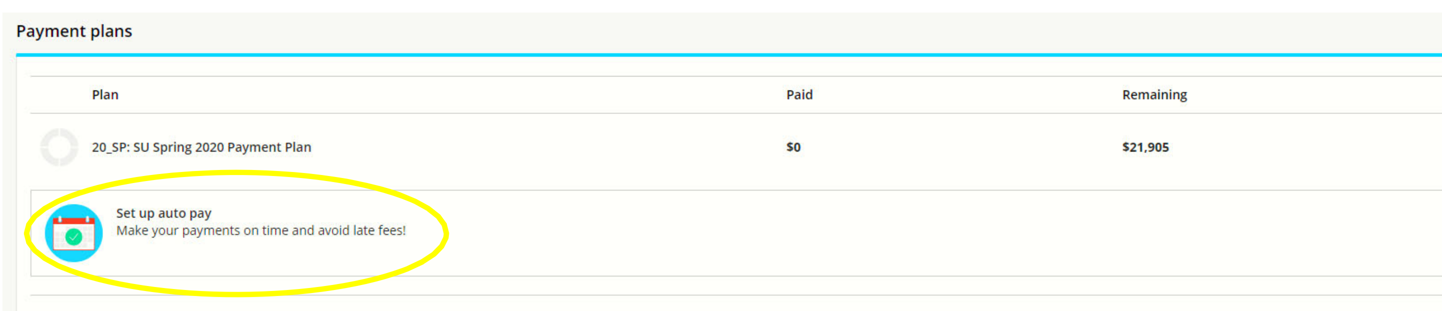
- To see the details for the payment plan that you are already enrolled in such as installment amounts and dates, total plan amount, remaining balance, and to review your signed payment plan terms agreement guide the mouse over any part of the plan description and click.



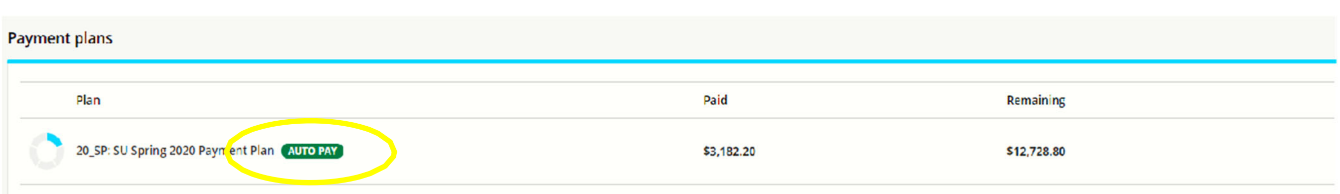
- **If you need two payment plans (two or more individuals making payments), please contact the Business Office for assistance in setting up the payment plans.** Multiple plans will be listed individually as “Special Payment Plan A” & “Special Payment Plan B.” Please make note of which plan belongs to which individual.



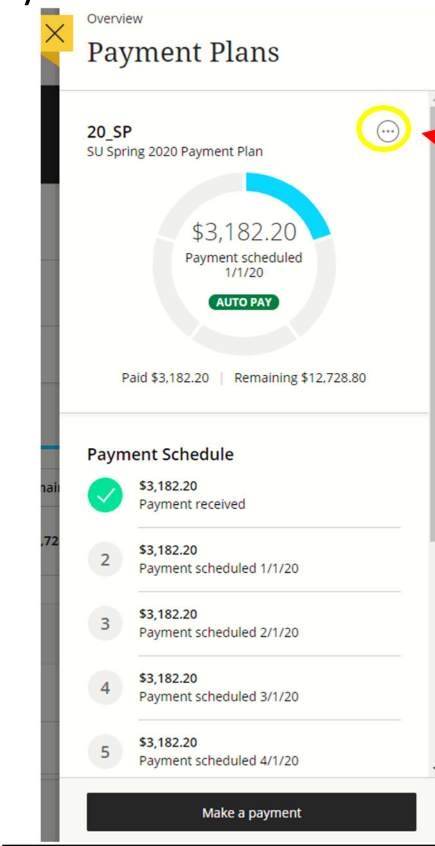

- To set up automatic payments click on the “Set up auto pay” below the payment plan description. Please note that enrolling in the payment plan and paying the plan fee of $25 does not automatically set up automatic payment for your payment plan.



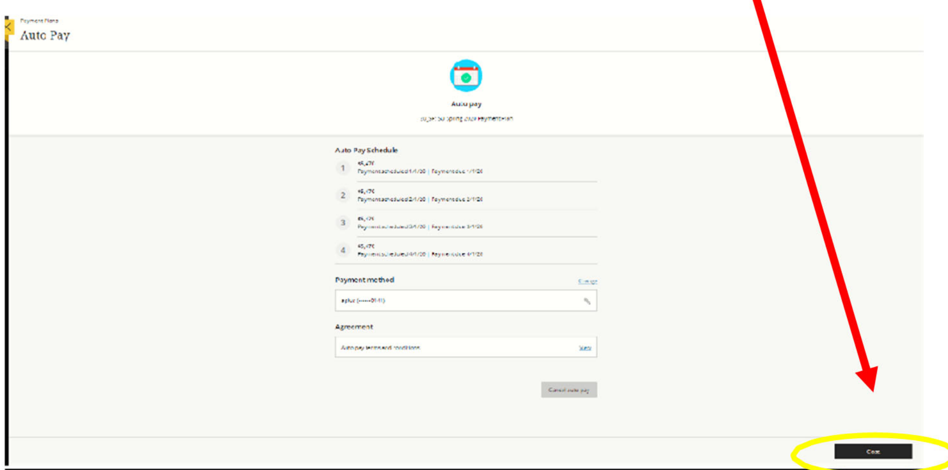

- If you have already enrolled in automatic payments, you will see the green “Auto Pay” amount next to your payment plan description as shown below.



- Clicking on the payment plan will open up the plan detail screen, which will show payment history as well as the payment schedule of the remaining payments.




- To see details of the Auto Payment Plan, click on the circle with three dots in the upper right and choose "View Auto Pay."
- If you need to cancel your enrollment in auto pay select the "Cancel Auto Pay" button that is highlighted below



## 4. Recent Payments Section

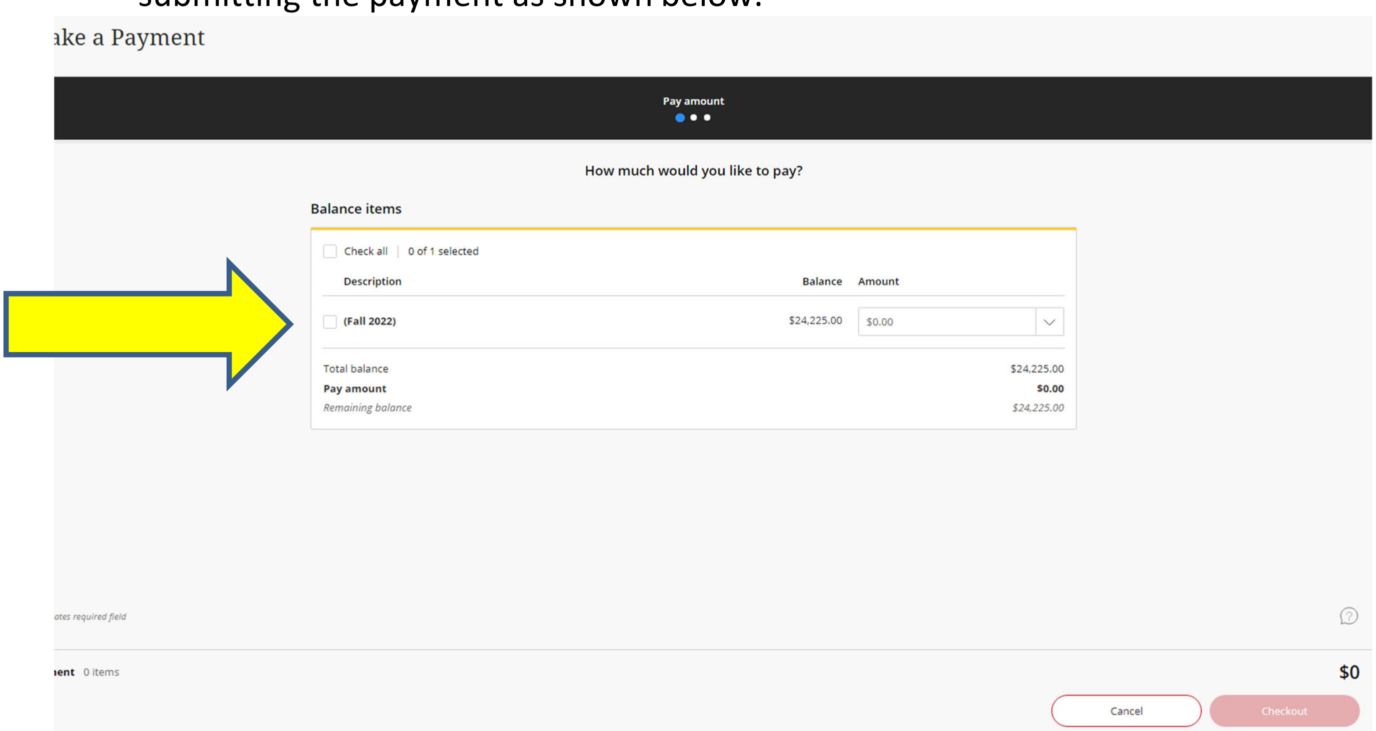
Recent payments — view all

| Date | Description | Receipt | Amount |
|---|---|---|---|
| 8/26/19 | 19_FA (Fall 2019) | #54259 | $369.90 |
| 2/15/19 | Account Balance (Spring 2019) | #49519 | $184.95 |
| 12/7/18 | Account Balance | #48369 | $531.22 |

- This section shows a history of your on-line payments that were paid via ACH or credit card.
- Please note that payments sent via the mail or made in person will not appear in this section because the payments were not made online through the CashNet Payment Portal.
- **Select the "View all" link at the top of this section to see additional payments not shown on the Overview screen.**

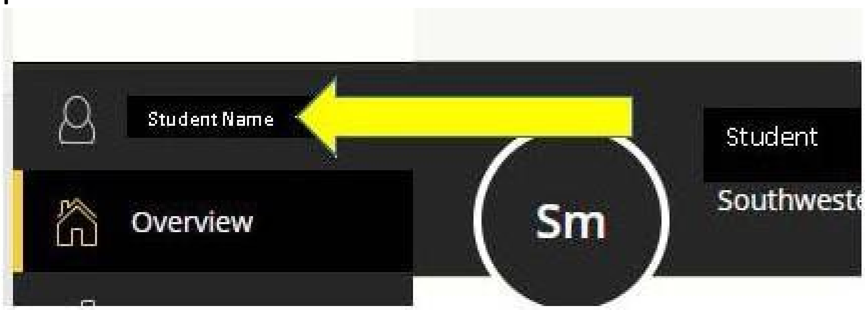
## 5. Make A Payment Button

- At the bottom right corner of the Overview screen is the "Make a payment" link that proceeds to the payment screen.
- At the payment screen, the payer can select the term and change the amount before submitting the payment as shown below.

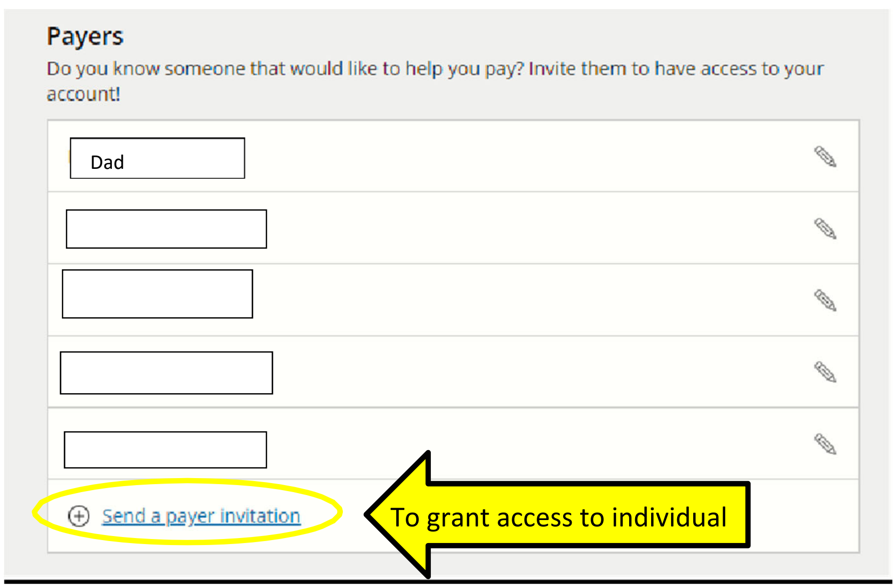


## “Payers” Section – To send invitation to payer or manage existing payers

To find the area where a student can add a new payer, click on the student name in the upper left corner.




The Student profile page that appears includes a “Payers” section that lists the current authorized payers and provides a link to “Send a payer invitation” at the bottom of the screen.




- This section is used to add and remove payer access.
- In order for parents or other individuals to receive online access to your student account to view e-bills, to receive alerts, to make on-line payments, or to setup a payment plan, the student must send the individual a “Payer Invitation” and give them the proper permissions.
- See detailed instructions on following pages for setting up payer access. This is a two-part process – Part 1 is completed by the student and Part 2 is completed by the invited payer.

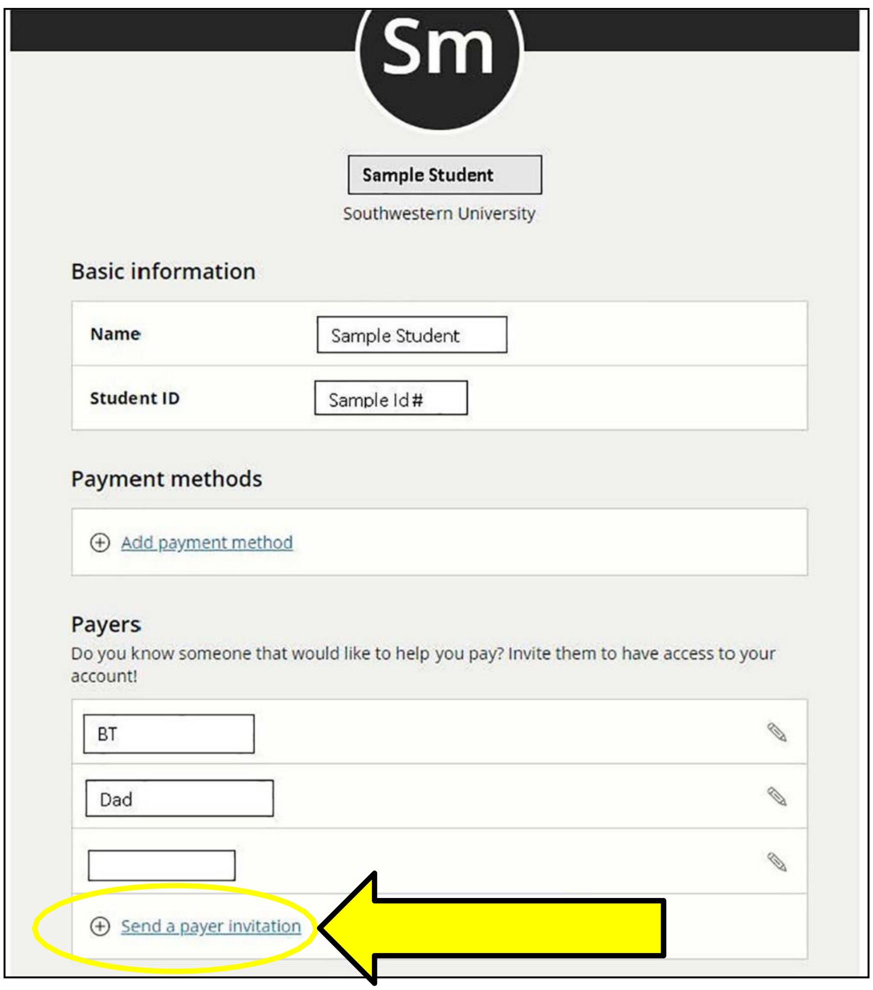
# <u>SETTING UP PAYER ACCESS</u>

**(This is a 2 Part process - Part 1 is completed by the student & Part 2 is completed by the payer.)**

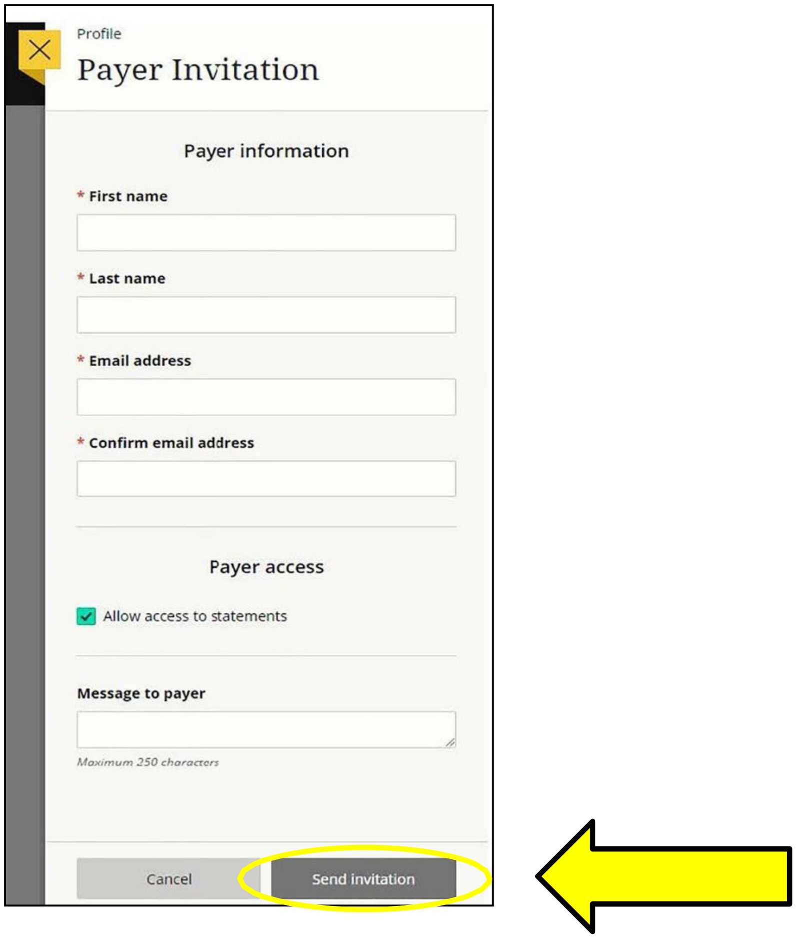
## PART 1 - Student Must Give Payer Access

In order for parents or other individuals to receive online access to your student account to view e-bills, to receive alerts, to make on-line payments, and to setup a payment plan, the student must have the payer's email and send an invitation as follows.

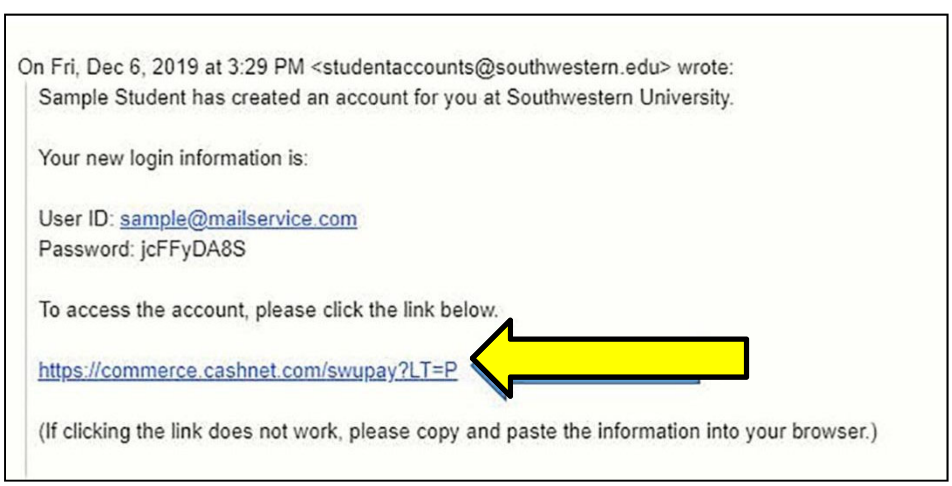
1. To set up a parent or other individual with access, the student must select the "Send a Payer Invitation" link as shown below.



2. The student must provide the payer's first and last names and email address. For confirmation, the email address will be required to be entered twice. The student can include an optional message if desired. To send the invitation, click on the "Send invitation" link.




3. A welcome message will be automatically sent to the new authorized payer's email address provided. The email will provide the payer with their User ID, temporary password, and **a link** to access the site as shown in the example below. Please note the temporary password sent in the email is only valid for 24 hours.



On Fri, Dec 6, 2019 at 3:29 PM <studentaccounts@southwestern.edu> wrote:

Sample Student has created an account for you at Southwestern University.

Your new login information is:

User ID: sample@mailservice.com
Password: jcFFyDA8S

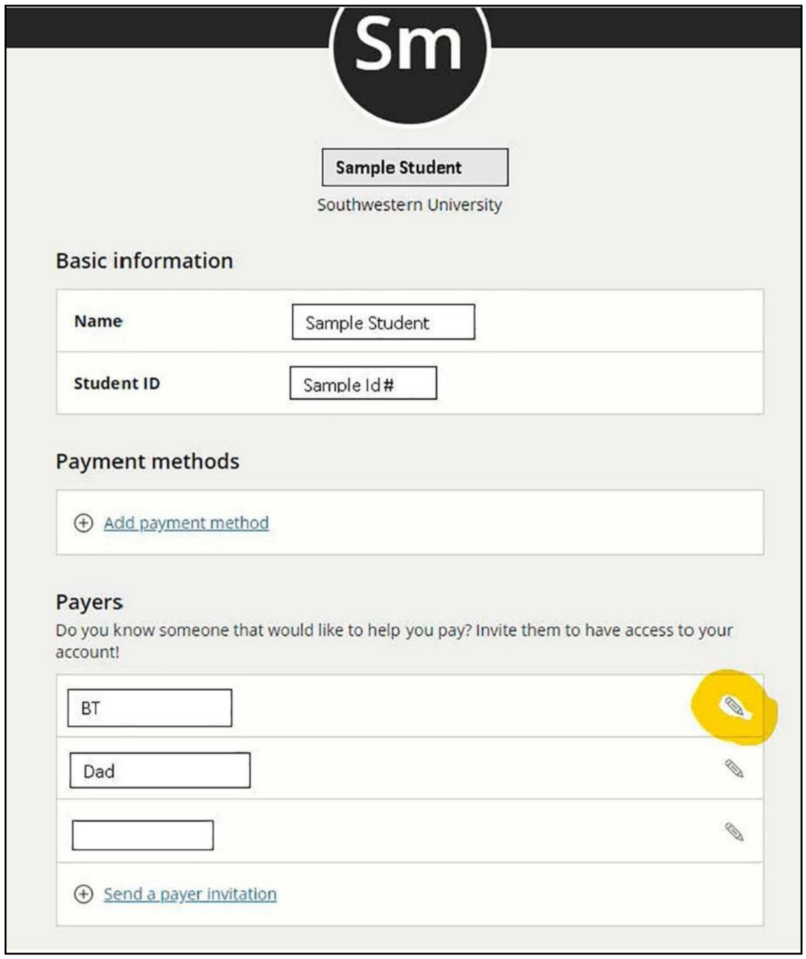
To access the account, please click the link below.

https://commerce.cashnet.com/swupay?LT=P

(If clicking the link does not work, please copy and paste the information into your browser.)

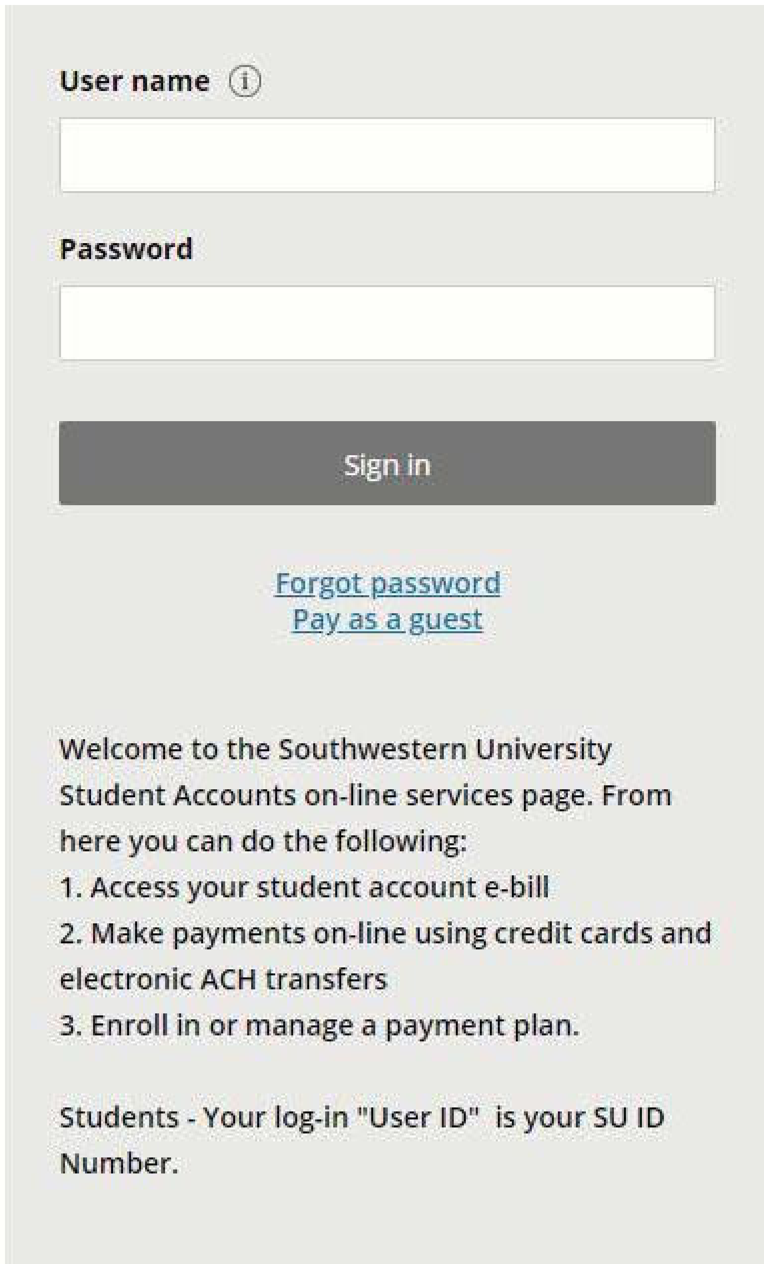
**To Change Payer Access & Reset Passwords–**

Select the "pencil" icon next to the payer to remove payer access or to resend a new invitation, if the password was forgotten.



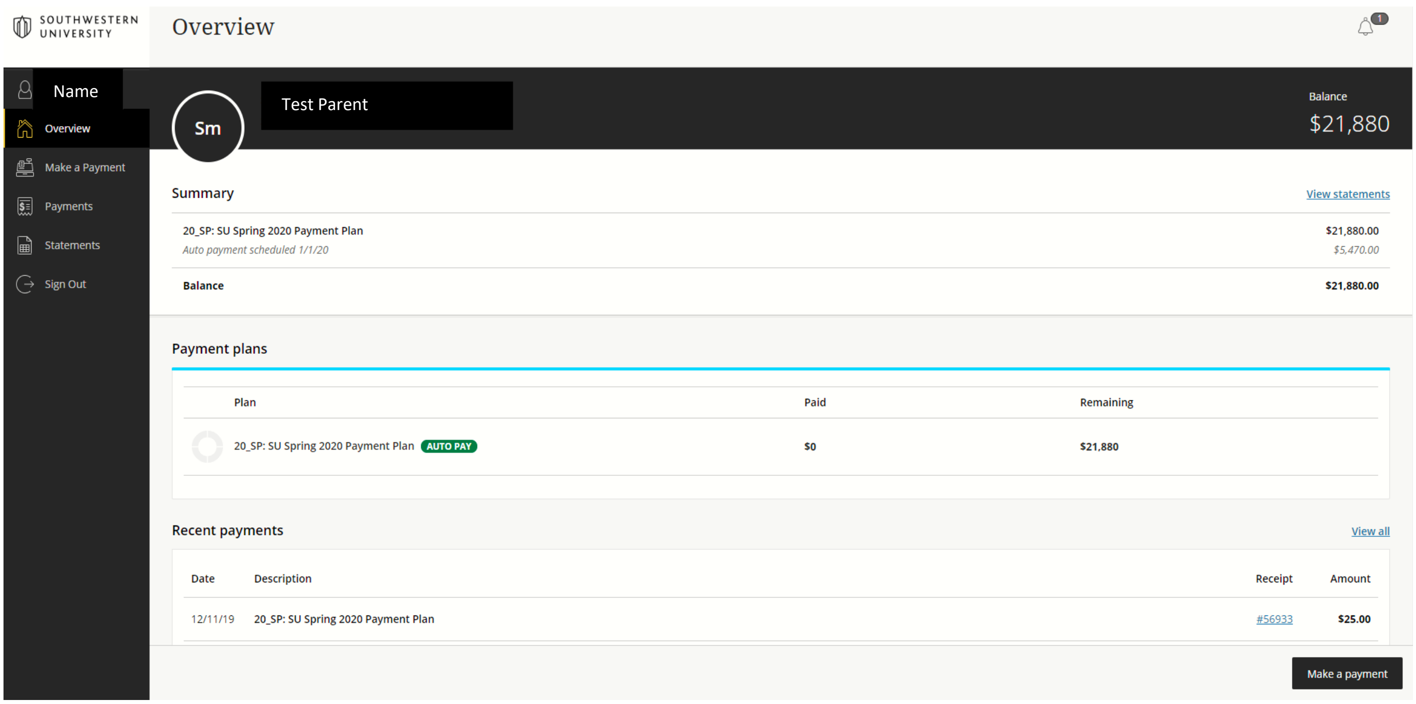
## PART 2 - Payer Must Log-In & Complete Setup Process

1. Using the “New Account Notification” email generated by the student, the payer should select the link to access the account provided in the email and log on using the provided User ID and temporary Password. The log in screen provided by the link is shown below.
    - The Payer Log on page can always be found at https://commerce.cashnet.com/swupay



**2.** Once logged in, the Payer's Transact Payments Portal will appear as shown below:

- Please note that the Payer Transact Payments Portal is very similar to the Student Transact Payments Portal. The payer can view ebills, make payments, enroll in the payment plan, set up automatic payments, and manager user preferences using the same process as used in the Student Transact Payments Portal.



**3.** To Setup or Change Your User Information

- Click on your name in the upper left corner. That will bring up your user profile.
- The "Payment methods" section allows you to add or change your payment methods including credit cards and bank account information for e-checks.
- Use the "Contact Information" section to manage your email address.
- Use the "Notifications" section to edit your email and SMS text notifications.