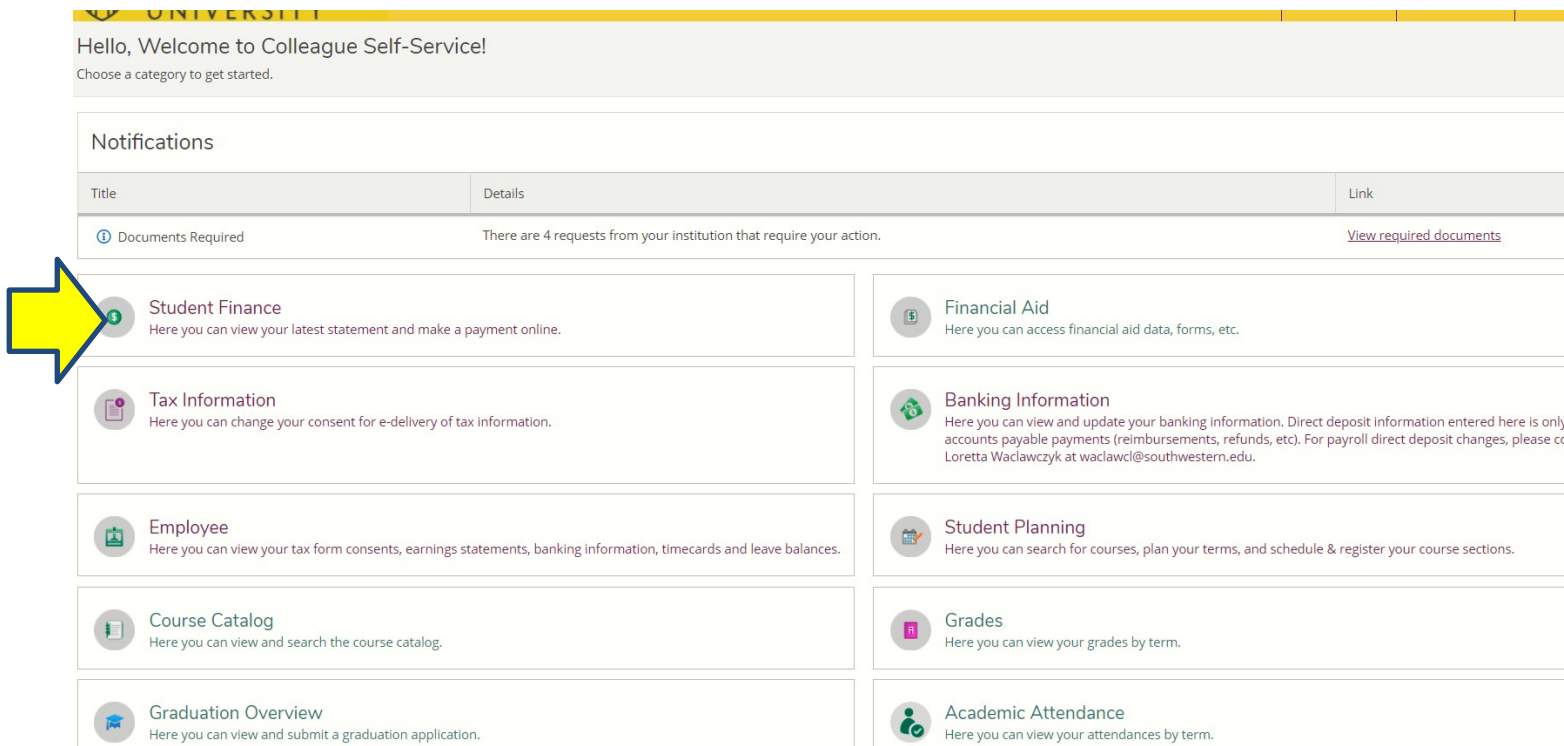


Setting Up & Managing Authorized Payer Access to your Transact Payment Portal

Students must log into their SU Self Service account to access their Transact Payment Portal to add or change a Payer's authorizations.



UNIVERSITY

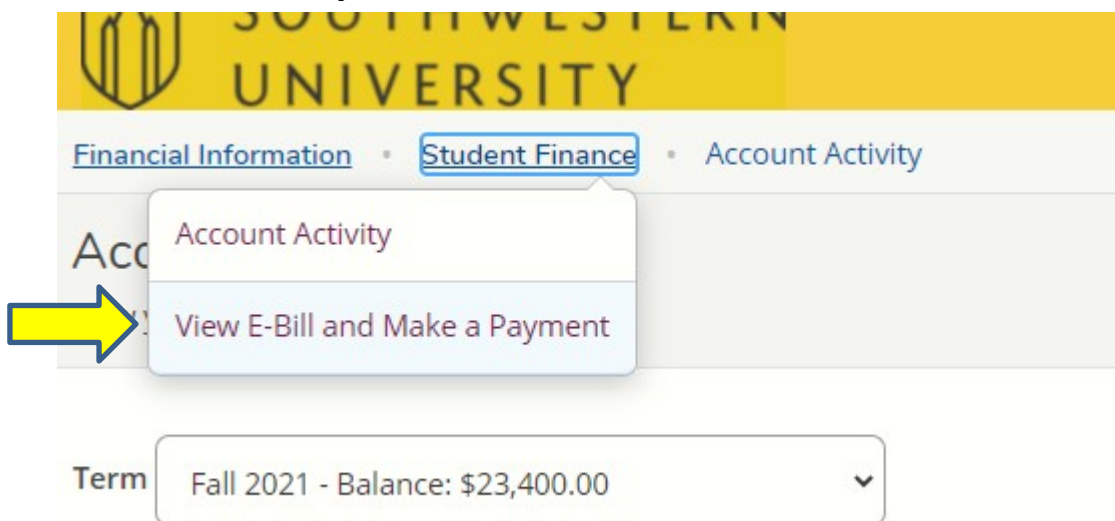
Hello, Welcome to Colleague Self-Service!
Choose a category to get started.

Notifications

Title	Details	Link
Documents Required	There are 4 requests from your institution that require your action.	View required documents

- Student Finance**
Here you can view your latest statement and make a payment online.
- Tax Information
Here you can change your consent for e-delivery of tax information.
- Employee
Here you can view your tax form consents, earnings statements, banking information, timecards and leave balances.
- Course Catalog
Here you can view and search the course catalog.
- Graduation Overview
Here you can view and submit a graduation application.
- Financial Aid
Here you can access financial aid data, forms, etc.
- Banking Information
Here you can view and update your banking information. Direct deposit information entered here is only accounts payable payments (reimbursements, refunds, etc). For payroll direct deposit changes, please contact Loretta Waclawczyk at waclawcl@southwestern.edu.
- Student Planning
Here you can search for courses, plan your terms, and schedule & register your course sections.
- Grades
Here you can view your grades by term.
- Academic Attendance
Here you can view your attendances by term.

The CashNet Payment Portal link is found in the “Student Finance” section:



SOUTHWESTERN UNIVERSITY

[Financial Information](#) • [Student Finance](#) • [Account Activity](#)

Account Activity

[View E-Bill and Make a Payment](#)

Term: Fall 2021 - Balance: \$23,400.00

Click on 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](#)

Click on the "Student Account Information"

SETTING UP PAYER ACCESS

(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 send the individual a “Payer Invitation” as follows.

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



2. The Student profile page that appears includes a “Payers” section that lists the current authorized payers.
- This section is used to add and remove payer access.
 - To add a new payer click on the link to “Send a payer invitation” at the bottom of the screen.

Sm

Sample Student
Southwestern University

Basic information

Name	Sample Student
Student ID	Sample Id #

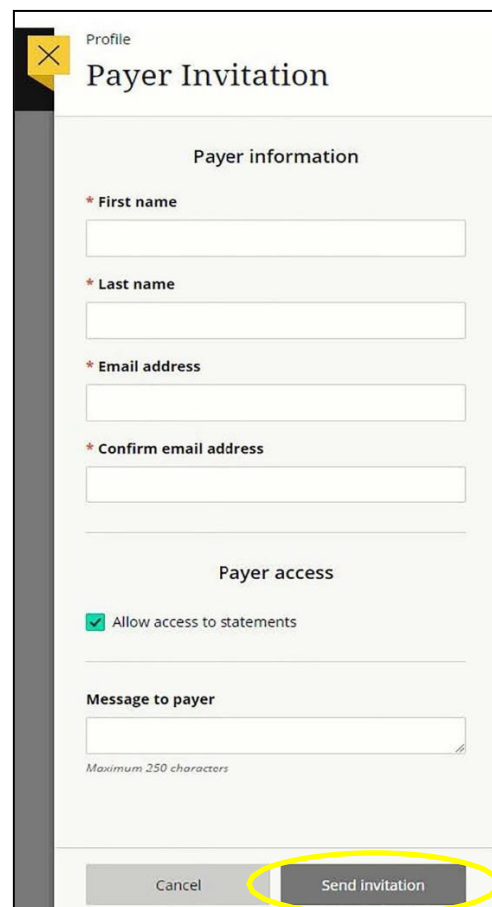
Payment methods

[+ Add payment method](#)

Payers
Do you know someone that would like to help you pay? Invite them to have access to your account!

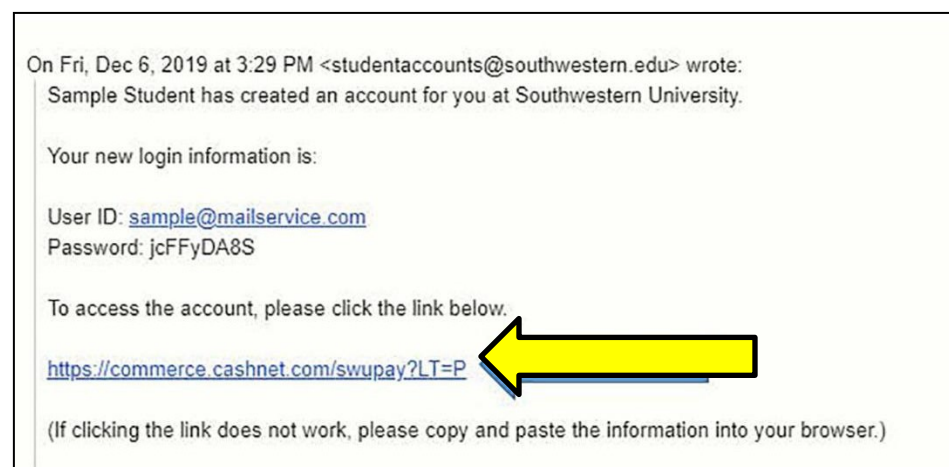
BT	
Dad	
+ Send a payer invitation	

3. 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 complete the process and send the payer invitation, click on the "Send Invitation" button at the bottom of the screen.



The screenshot shows a web form titled "Payer Invitation" with a "Profile" tab. The form is divided into three sections: "Payer information", "Payer access", and "Message to payer". The "Payer information" section contains four required fields: "First name", "Last name", "Email address", and "Confirm email address". The "Payer access" section has a checkbox labeled "Allow access to statements" which is checked. The "Message to payer" section has a text area with a "Maximum 250 characters" limit. At the bottom, there are two buttons: "Cancel" and "Send Invitation". The "Send Invitation" button is highlighted with a yellow oval, and a large yellow arrow points to it from the right.

4. 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.



The screenshot shows an email message from "studentaccounts@southwestern.edu" dated "Fri, Dec 6, 2019 at 3:29 PM". The email content is as follows:

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.)

A large yellow arrow points to the link from the right.

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.

Sm

Sample Student

Southwestern University

Basic information

Name

Sample Student

Student ID

Sample Id #

Payment methods

+ Add payment method

Payers

Do you know someone that would like to help you pay? Invite them to have access to your account!

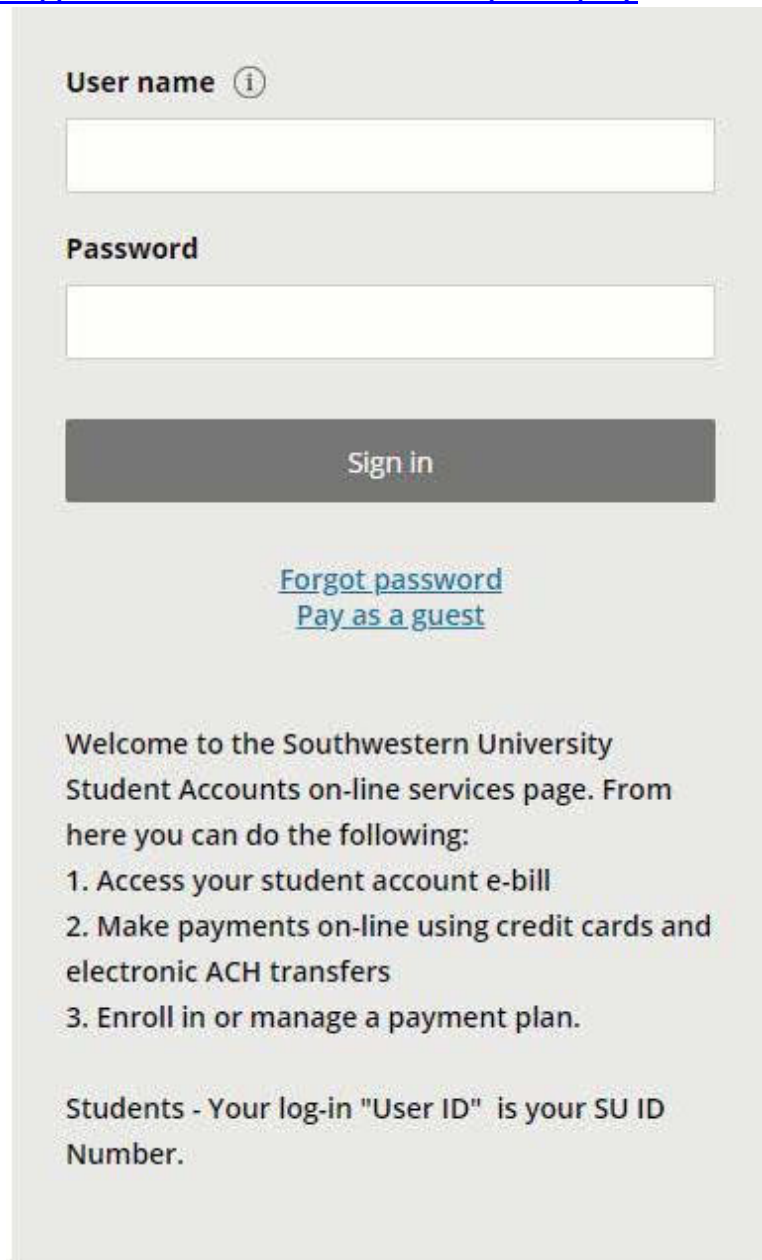
BT

Dad

+ Send a payer invitation

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>



The screenshot shows a login interface for Southwestern University's Student Accounts on-line services. It features a light gray background with a white login box. Inside the box, there are two input fields: one for the 'User name' (with an information icon) and one for the 'Password'. Below these fields is a dark gray 'Sign in' button. Under the button, there are two links: 'Forgot password' and 'Pay as a guest'. At the bottom of the box, there is a welcome message and a list of services available to students, followed by a note about the User ID for students.

User name ⓘ

Password

Sign in

[Forgot password](#)
[Pay as a guest](#)


Welcome to the Southwestern University
Student Accounts on-line services page. From
here you can do the following:

1. Access your student account e-bill
2. Make payments on-line using credit cards and
electronic ACH transfers
3. Enroll in or manage a payment plan.


Students - Your log-in "User ID" is your SU ID
Number.


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


- Please note that the Payer Transact Payment Portal is very similar to the Student Transact Payment 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 Payment Portal. Please refer to the document "Transact Payment Portal Instructions – Access & Overview" document for details about how these processes work.


 SOUTHWESTERN
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
Overview





 Name


 Overview

 Make a Payment

 Payments

 Statements

 Sign Out

 Sm

Test Parent

Balance
\$21,880

Summary

[View statements](#)

20_SP: SU Spring 2020 Payment Plan

Auto payment scheduled 1/1/20


\$21,880.00

\$5,470.00

Balance

\$21,880.00

Payment plans

Plan	Paid	Remaining
 20_SP: SU Spring 2020 Payment Plan AUTO PAY	\$0	\$21,880

Recent payments

[View all](#)

Date	Description	Receipt	Amount
12/11/19	20_SP: SU Spring 2020 Payment Plan	#56933	\$25.00

Make a payment

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 echecks.
- Use the “Contact Information” section to manage your email address.
- Use the “Notifications” section to edit your email and SMS text notifications.

The screenshot shows the user profile page for Southwestern University. On the left is a dark sidebar with a menu. The 'Name' menu item is highlighted with a yellow arrow pointing to it. The main content area on the right is titled 'Basic information' and contains several sections: 'Basic information' with fields for Name (Test Parent), User name (sample@emailaddress.com), Password (masked), Student name (Test Student), and Student ID (0010480); 'Payment methods' with an 'Add payment method' link; 'Contact information' with an 'Email address' field (sample@emailaddress.com); 'Notifications' with 'Email notifications' and 'SMS notifications' (with a 'Sign up' link); and 'Privacy & terms' with a 'Use of personal information' link (with a 'View' link).

SOUTHWESTERN UNIVERSITY

Name

Overview

Make a Payment

Payments

Statements

Sign Out

Basic information

Name	Test Parent
User name	sample@emailaddress.com
Password	*****
Student name	Test Student
Student ID	0010480

Payment methods

[Add payment method](#)

Contact information

Email address	sample@emailaddress.com
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Notifications

Email notifications	
SMS notifications	Sign up

Privacy & terms

Use of personal information	View
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