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

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

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

View E-Bill and Make a Payment

- 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
- Setup & 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
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 online payments, and to setup a payment plan, the student must have the payer’s email and send an 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. To set up a parent or other individual with access, the student must select the “Send a Payer Invitation” link as shown below.
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 send the invitation, click on the “Send invitation” link.

![Payer Invitation form]

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.

```
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: JoFFyDA8S

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

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 Payments Portal will appear as shown below:

- Please note that the Payer Transact Payments Portal is similar to the Student Transact Payments Portal. The payer can view E-bills, make payments, enroll in the payment plan, set up automatic payments, and manage 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.