

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

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

SOUTHWESTERN UNIVERSITY

CHANGE P...

CURRENT STUDENTS - WEBADVISOR FOR STUDENTS MENU

The following links may display confidential information.

User Account

Contact Information

Financial Information

Account Details
[CashNet Payment Portal - ebills, payment plan, payments](#)
[Federal Title IV Funds Authorization](#)
[Payment Terms Agreement](#)

Financial Aid

Federal Title IV Funds Authorization
[Financial Aid Checklist](#)

Registration

[SU Search for Sections](#)
[Registration Eligibility](#)
[Self-Service](#)

Student Planning
[Apply for Graduation](#)

My class schedule
[Apply for Graduation](#)
[Transcript by Course](#)
[Confirmation of Attendance](#)
[eTranscript Request](#)

Post Office Box Combination
[Assigned Room Check-In Form](#)
[Add/Change Meal Plan](#)
[Student Handbook Agreement](#)
[First-Year Students - Preferences for Housing](#)
[Incoming Transfer/Re-Admit Student Housing Re...](#)

The CashNet Payment Portal link is found in the “Financial Information” section:

Financial Information

[Account Details](#)
[CashNet Payment Portal - ebills, payment plan, payments](#)
[Federal Title IV Funds Authorization](#)
[Payment Terms Agreement](#)

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.

The screenshot displays the student profile interface for Southwestern University. At the top, the 'Sm' logo is visible. Below it, the student's name 'Sample Student' and 'Southwestern University' are shown. The 'Basic information' section contains fields for 'Name' (Sample Student) and 'Student ID' (Sample Id #). The 'Payment methods' section has a link to '+ Add payment method'. The 'Payers' section includes a sub-header and a prompt: 'Do you know someone that would like to help you pay? Invite them to have access to your account!'. Below this, there are three rows, each with a text input field and an edit icon. The first row contains 'BT', the second 'Dad', and the third is empty. At the bottom of the Payers section, a link '+ Send a payer invitation' is highlighted with a yellow circle, and a large yellow arrow points to it from the right.

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.

Profile
Payer Invitation

Payer information

* First name

* Last name

* Email address

* Confirm email address

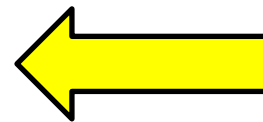
Payer access

Allow access to statements

Message to payer

Maximum 250 characters

Cancel Send invitation



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: 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.

Sm

Sample Student
Southwestern University




Basic information

Name	Sample Student
Student ID	Sample Id #

Payment methods

+ [Add payment method](#)

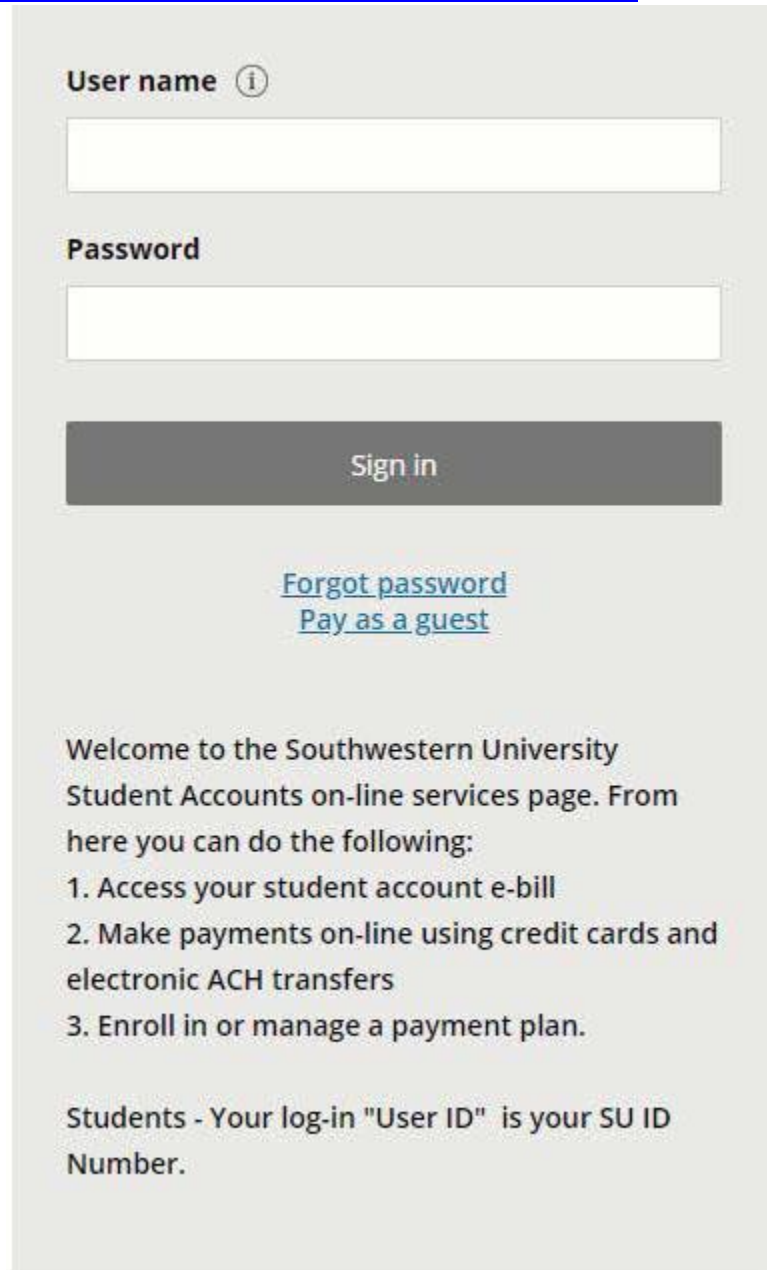
Payers
Do you know someone that would like to help you pay? Invite them to have access to your account!

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 log-in form with the following elements:

- User name** (with an information icon) and an empty text input field.
- Password** and an empty text input field.
- A dark grey **Sign in** button.
- Two links: [Forgot password](#) and [Pay as a guest](#).
- A welcome message: "Welcome to the Southwestern University Student Accounts on-line services page. From here you can do the following:"
- A numbered list of services:
 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.
- A note for students: "Students - Your log-in 'User ID' is your SU ID Number."

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

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

The screenshot displays the Payer's CashNet Payment Portal interface for Southwestern University. The page title is "Overview". The user is identified as "Test Parent" with a balance of \$21,880. The interface includes a navigation sidebar with options: Name, Overview, Make a Payment, Payments, Statements, and Sign Out. The main content area is divided into three sections: Summary, Payment plans, and Recent payments.

Summary

Item	Amount
20_SP: SU Spring 2020 Payment Plan	\$21,880.00
Auto payment scheduled 1/1/20	\$5,470.00
Balance	\$21,880.00

[View statements](#)

Payment plans

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

Recent payments

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


[View all](#)

[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 menu with the following items: Name (highlighted with a yellow arrow), Overview, Make a Payment, Payments, Statements, and Sign Out. The main content area is titled 'Basic information' and contains a table with the following data:

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

Below the table are sections for 'Payment methods' (with an 'Add payment method' link), 'Contact information' (with an 'Email address' field containing 'sample@emailaddress.com'), 'Notifications' (with 'Email notifications' and 'SMS notifications' fields, the latter having a 'Sign up' link), and 'Privacy & terms' (with a 'Use of personal information' field and a 'View' link). A yellow arrow points from the 'Name' menu item to the 'Basic information' section.