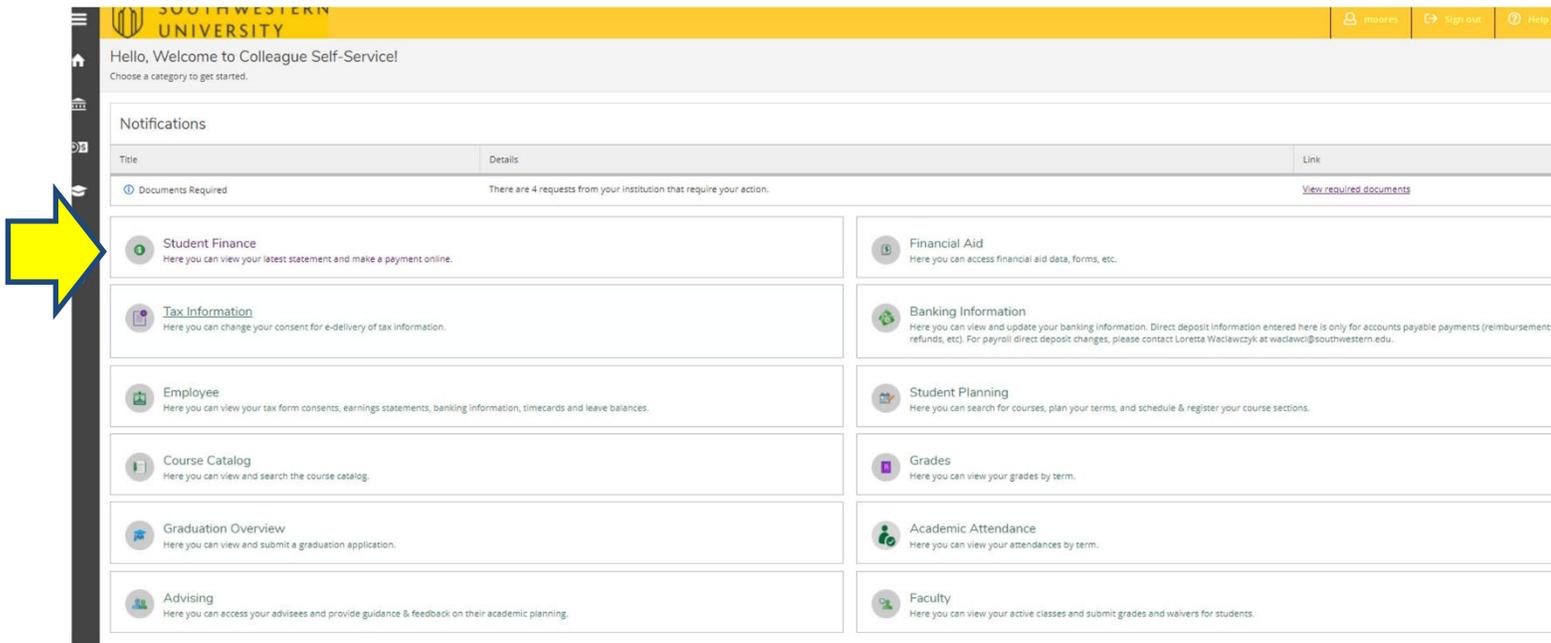


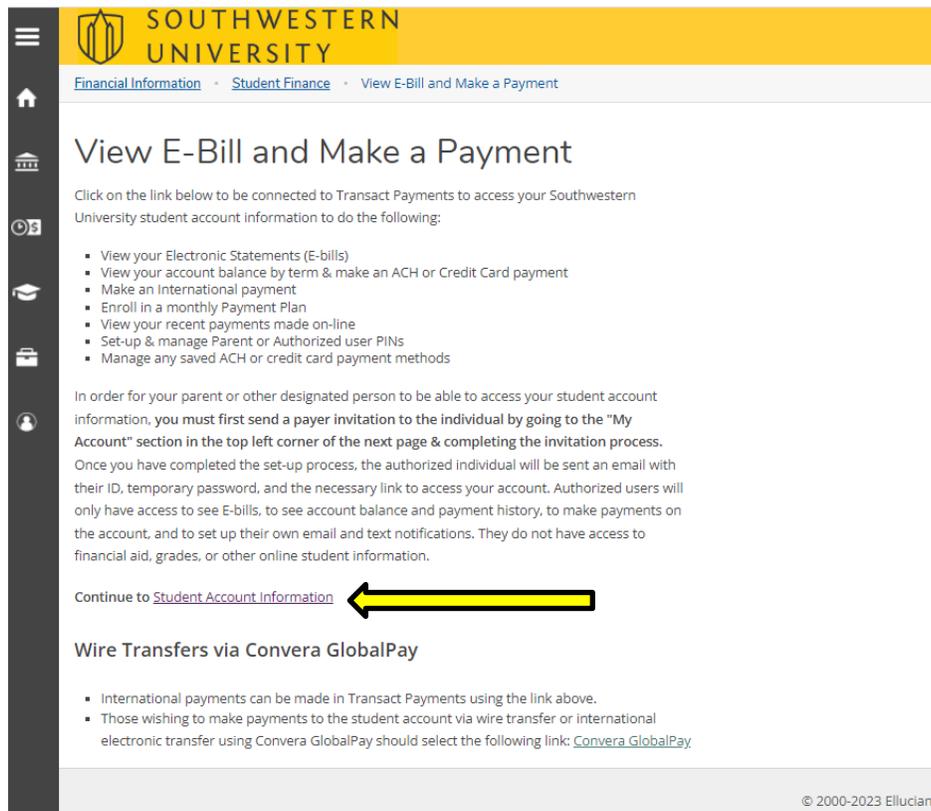
Setting Up & Managing Authorized Payer Access to your Transact Payments Portal

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



The screenshot shows the Southwestern University Colleague Self-Service portal. The header includes the university logo and navigation links for 'moore's', 'Sign out', and 'Help'. The main content area is titled 'Hello, Welcome to Colleague Self-Service!' and 'Choose a category to get started.' Below this is a 'Notifications' section with a table showing a notification about documents required. The left-hand menu is visible, with a yellow arrow pointing to the 'Student Finance' tile. The main content area contains several tiles for various services: Student Finance, Financial Aid, Banking Information, Student Planning, Grades, Academic Attendance, and Faculty.

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



The screenshot shows the 'View E-Bill and Make a Payment' page in the Southwestern University Self-Service portal. The breadcrumb trail is 'Financial Information > Student Finance > View E-Bill and Make a Payment'. The page title is 'View E-Bill and Make a Payment'. The main content area contains a list of actions: 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, and Manage any saved ACH or credit card payment methods. Below this is a paragraph explaining that to allow a parent or other designated person to access the student account information, the user 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 completed, the authorized individual will be sent an email with their ID, temporary password, and the necessary link to access their 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. At the bottom of the page, there is a link 'Continue to Student Account Information' with a yellow arrow pointing to it. Below this is a section for 'Wire Transfers via Convera GlobalPay' with a list of instructions: International payments can be made in Transact Payments using the link above, and those wishing to make payments to the student account via wire transfer or international electronic transfer using Convera GlobalPay should select the following link: Convera GlobalPay.

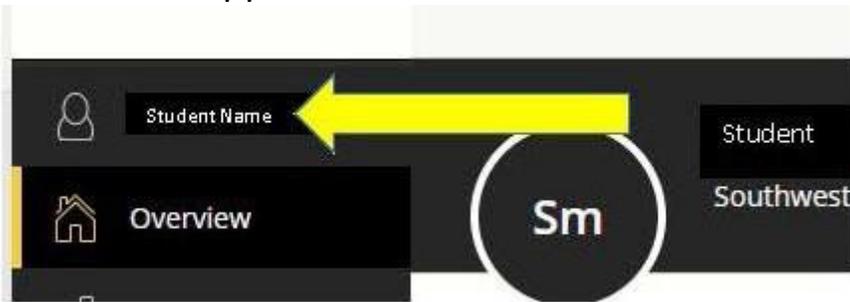
SETTING UP PAYER ACCESS

(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 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.

A screenshot of a web browser displaying a student account page. At the top, there is a circular logo with "Sm" and the text "Sample Student" and "Southwestern University". Below this, there are sections for "Basic information" (Name: Sample Student, Student ID: Sample Id#), "Payment methods" (with a link to "Add payment method"), and "Payers" (with a list of existing payers: BT, Dad, and an empty field). At the bottom of the "Payers" section, there is a link that says "Send a payer invitation" with a plus sign icon. This link is circled in yellow, and a yellow arrow points from the right towards it.

- 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.

Profile

Payer Invitation

Payer information

* First name

* Last name

* Email address

* Confirm email address

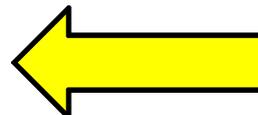
Payer access

Allow access to statements

Message to payer

Maximum 250 characters

Cancel Send invitation



- 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](#)

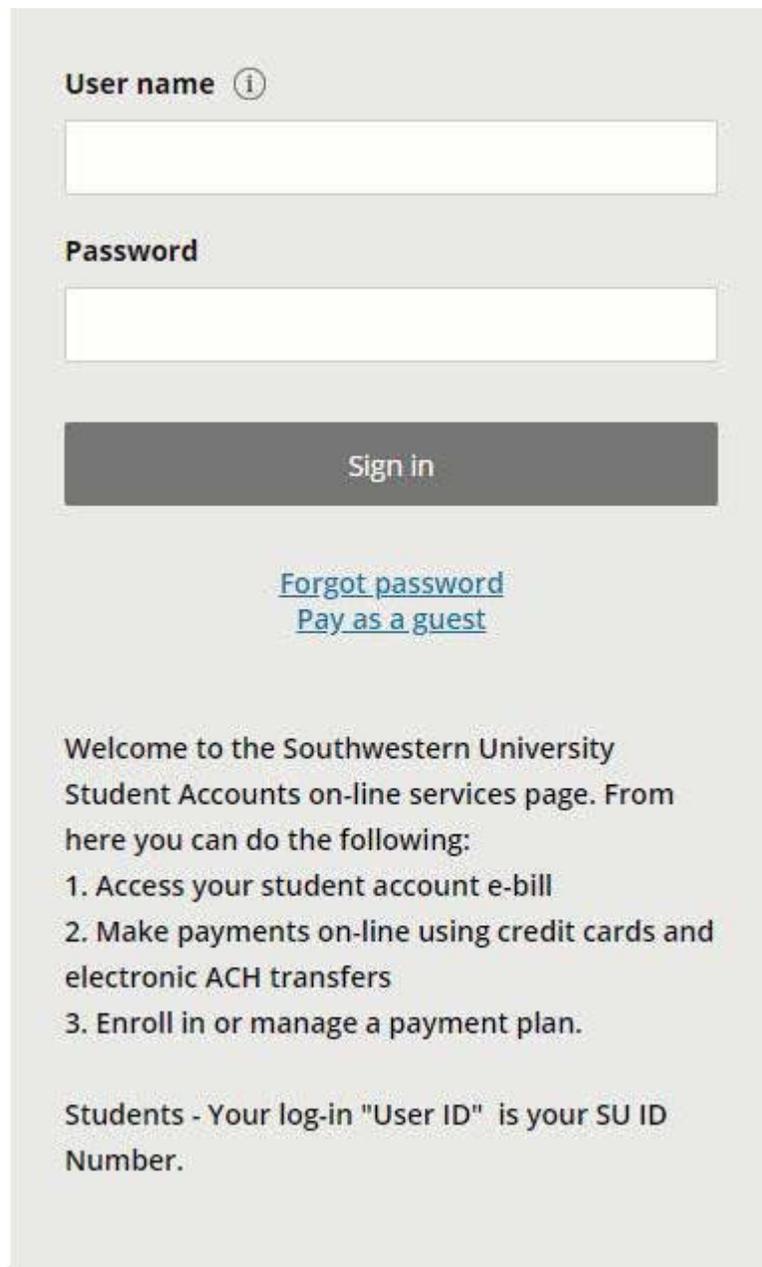
Payers
Do you know someone that would like to help you pay? Invite them to have access to your account!

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>



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 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.

The screenshot shows the 'Overview' page of the Payer's Transact Payments Portal for Southwestern University. The page is for a user named 'Test Parent' with a balance of \$21,880.00. 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 1/11/20	\$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

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

Navigation menu on the left: Name, Overview, Make a Payment, Payments, Statements, Sign Out. A 'Make a payment' button is located at the bottom right of the page.

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.

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

Notifications

Email notifications

SMS notifications [Sign up](#)

Privacy & terms

Use of personal information [View](#)