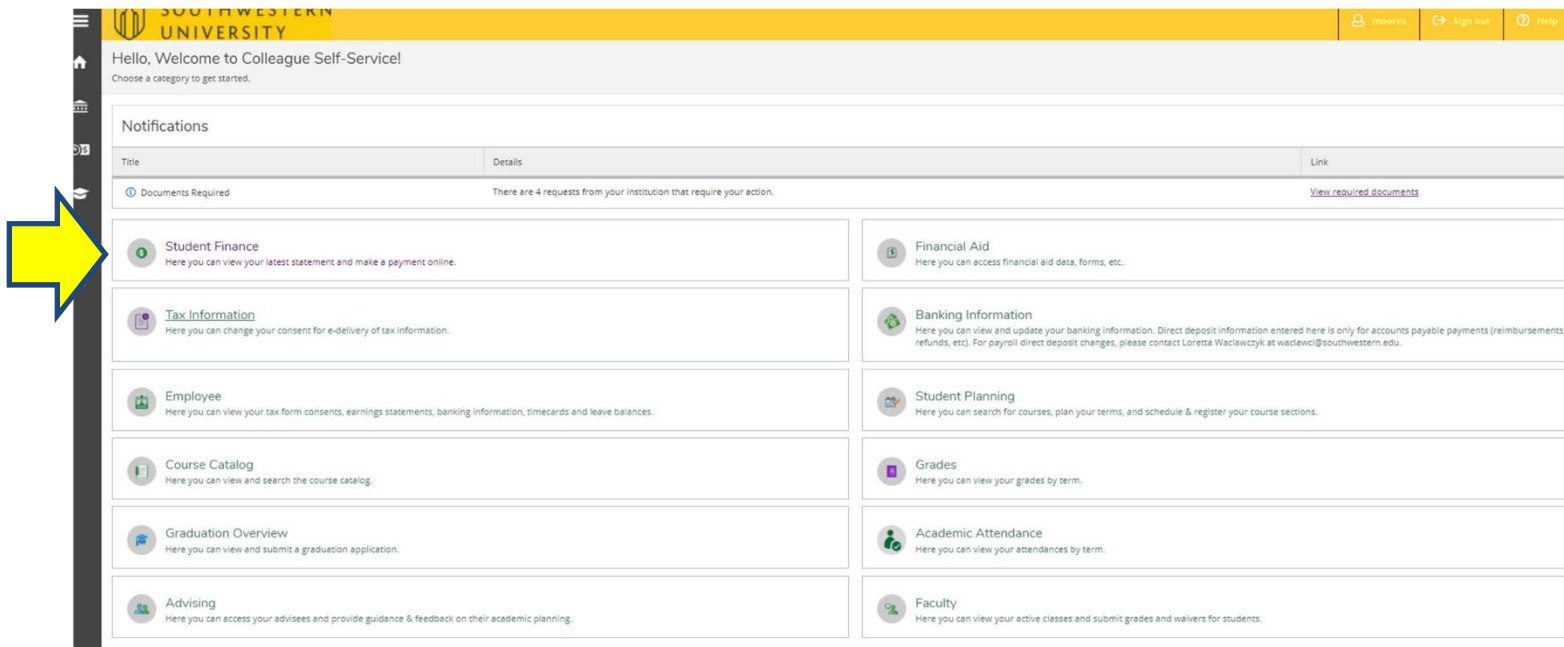


Accessing On-Line Student Account Detail & Transact Payments Portal

Students log into their SU Self Service account to access the screen below. The student account links are found in the “Student Finance” section:



The screenshot shows the Southwestern University Colleague Self-Service portal. The header includes the university logo and name, a user profile icon, and links for 'Logout' and 'Help'. The main content area is titled 'Hello, Welcome to Colleague Self-Service!' and includes a 'Notifications' section with a table of alerts. A yellow arrow points to the 'Student Finance' link in the left-hand navigation menu.

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.

Financial Aid
Here you can access financial aid data, forms, etc.

Tax Information
Here you can change your consent for e-delivery of tax information.

Banking Information
Here you can view and update your banking information. Direct deposit information entered here is only for accounts payable payments (reimbursements, refunds, etc). For payroll direct deposit changes, please contact Loretta Wacławczyk: at waclawo@southwestern.edu.

Employee
Here you can view your tax form consents, earnings statements, banking information, timecards and leave balances.

Student Planning
Here you can search for courses, plan your terms, and schedule & register your course sections.

Course Catalog
Here you can view and search the course catalog.

Grades
Here you can view your grades by term.

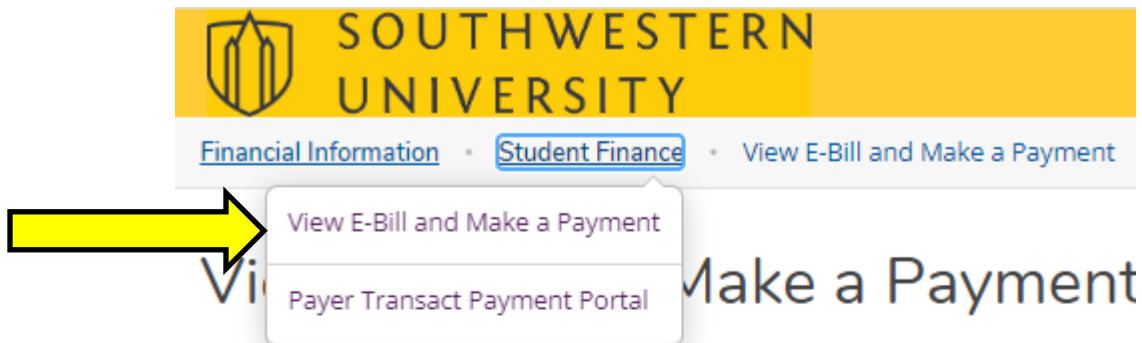
Graduation Overview
Here you can view and submit a graduation application.

Academic Attendance
Here you can view your attendances by term.

Advising
Here you can access your advisees and provide guidance & feedback on their academic planning.

Faculty
Here you can view your active classes and submit grades and waivers for students.

- The “View E-Bill and Make a Payment” link is used by students 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 manage text or email notifications.



The image shows a screenshot of the Southwestern University website. At the top, there is a yellow header with the university's logo and name. Below the header, there is a navigation bar with three links: "Financial Information", "Student Finance", and "View E-Bill and Make a Payment". The "Student Finance" link is highlighted with a blue box. A yellow arrow points to a dropdown menu that is open under the "Student Finance" link. The dropdown menu contains two options: "View E-Bill and Make a Payment" and "Payer Transact Payment Portal". The "View E-Bill and Make a Payment" option is highlighted with a blue box. Below the dropdown menu, the text "View E-Bill and Make a Payment" is visible.

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 "Payer 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 their ID, temporary password, and the necessary link to access your account. Authorized individuals only have access to see E-bills, to see account balance and payment history, to n

“View E-Bill & Make a Payment” link

- Click on **“Student Account Information”** to continue to the Transact Payment Portal.



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 Convera GlobalPay

- 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 Convera GlobalPay should select the following link: [Convera GlobalPay](#)

- **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

The screenshot shows the 'Overview' page of the Student Transact Payment Portal. A red circle highlights the left-hand navigation menu, which includes: Student Name, Overview, Make a Payment, Payments, Statements, and Sign Out. A red arrow points from this menu to a detailed view of the menu in the bottom section. Yellow arrows point to various features: 'Notifications' (top right), 'E-Bills' (right side), 'Payment Plan' (center), and 'Make Pmts.' (bottom right). The main content area displays the student's name, a balance of \$21,880, a summary table for the 2020 Spring semester, and a section for payment plans.

| Summary | Balance |
|---------------------|-------------|
| 20_SP (Spring 2020) | \$21,880.00 |
| Balance | \$21,880.00 |

Need to enroll in a payment plan?
Enrolling in a payment plan takes just a few minutes and can help you spread out payments on your education expenses.

[View payment plan options](#)

Recent payments [View all](#)

[Make a payment](#)

A detailed view of the left-hand navigation menu. It features the Southwestern University logo at the top, followed by the student's name, and a list of menu items: Overview, Make a Payment, Payments, Statements, and Sign Out. The 'Overview' item is highlighted with a yellow bar.

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.

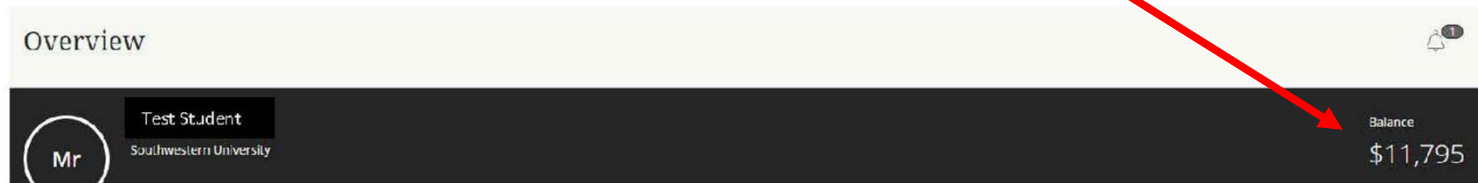
1. Notification Section –



- 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 | | \$381.00 |
| <i>Minimum due</i> | | <i>\$381.00</i> |

- 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.

- Click “View Statements,” to view the related statements.

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

“Statements” Section –

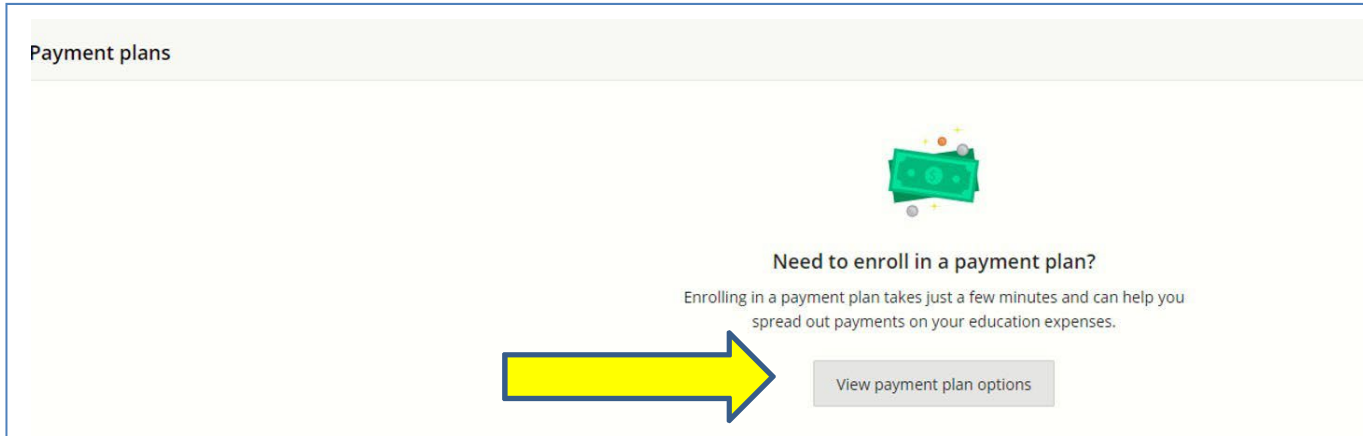
| Statements | | | | |
|------------|-------------|--|------|------|
| Date | Description | | View | Save |
| 12/2/19 | SWU Bill | | | |
| 11/14/19 | SWU Bill | | | |
| 7/9/19 | SWU Bill | | | |
| 6/27/19 | SWU Bill | | | |
| 4/26/19 | SWU Bill | | | |
| 11/30/18 | SWU Bill | | | |
| 11/9/18 | SWU Bill | | | |
| 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 request a new E-bill by sending an email to studentaccounts@southwestern.edu. A new E-bill will be published by the end of the business day. Students receive an email when a new e-bill is available.
- Reminder emails are 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.
- Click the link that says “View Payment Plan Options” to sign up for a payment plan for that term.

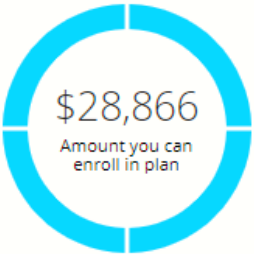


- After the link is clicked the following sidebar will appear:

Overview

Payment Plans

20_SP
SU Spring 2020 Payment Plan



\$28,866
Amount you can enroll in plan

4 payments | \$25 enrollment fee

Payment Schedule

| | |
|---|----------------------------------|
| 1 | \$7,216.50 Payment due 1/1/20 |
| 2 | \$7,216.50 Payment due 2/1/20 |
| 3 | \$7,216.50 Payment due 3/1/20 |
| 4 | \$7,216.50 Payment due 4/1/20 |

Auto pay available: If you set up auto pay, all scheduled payments will occur on the payment plan due dates.

Plan Details

Enrollment fee: There is an enrollment fee of \$25, due upon enrollment, to participate in this plan. This fee covers your school's administrative costs associated with the plan, and is in addition to the plan amount of \$28,866.

Cancel **Enroll in plan**

The plan provides a breakdown of payments and due dates based upon your account balance at time of enrollment. It also gives a broad overview of the plan details.

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

To Enroll



- After selecting “Enroll in plan”, accept the terms and conditions then click “Continue”.

Payment Schedule

| | | |
|---|------------|--------------------|
| 1 | \$7,276.30 | Payment due 1/1/20 |
| 2 | \$7,276.30 | Payment due 2/1/20 |
| 3 | \$7,276.30 | Payment due 3/1/20 |
| 4 | \$7,276.30 | Payment due 4/1/20 |

Terms and Conditions

Please read below and indicate your agreement to be bound by these terms and conditions by selecting the checkbox below.

I have read and agree to the DU Payment Plan terms and conditions presented.

- The next screen will ask for a phone number.

Payment Plan Enrollment

Enrollment information

Phone Number

Missouri University | Missouri 12 characters



- Finally, there is a \$25 payment plan enrollment fee. Payment is by credit card or e-check/ACH. If you have saved payment methods these will also be listed in the drop-down menu.
- **WARNING** - The system defaults to set up an auto pay option, using the same payment method as the \$25 fee. If you are fine with this, then continue. If you do not want a payment automatically withdrawn on the 10th of each month using the same payment method, uncheck the box that is circled below.

How would you like to pay?

Enrollment fee amount
\$25

* Payment method [Change](#)

New credit or debit card

AMERICAN EXPRESS DISCOVER  

* Card number

① Card number required

* Expiration date ① * Security code ①

MM / YY

* Zip/Postal code

International cardholders may input "N/A"

Card nickname ①

My card

Maximum 17 characters

Set up auto pay with the same payment method

Auto pay terms and conditions

By enrolling in the Southwestern University Installment Payment Plan (payment plan) Auto Pay, I agree to the following terms and conditions:

- 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

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.

- An email is sent with the terms and conditions.





B. Managing an Existing Payment Plan

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


- 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.

Payment plans

| Plan | Paid | Remaining |
|--|------|------------|
| 20_SP: 20 Spring Special Payment Plan A | \$0 | \$6,104.50 |
|  Set up auto pay Make your payments on time and avoid late fees! | | |
| 20_SP: 20 Spring Special Payment Plan B | \$0 | \$6,104.50 |
|  Set up auto pay Make your payments on time and avoid late fees! | | |

- To set up automatic payments click on the “Set up auto pay” below the payment plan description. Enrolling in the payment plan and paying the plan fee of \$25 does not automatically set up automatic payments.

Payment plans

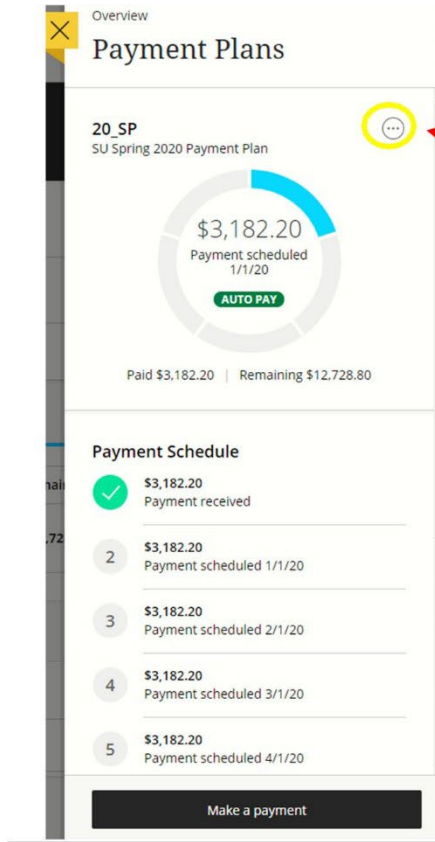
| Plan | Paid | Remaining |
|--|------|-----------|
| 20_SP: SU Spring 2020 Payment Plan | \$0 | \$21,905 |
|  Set up auto pay Make your payments on time and avoid late fees! | | |

- 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.

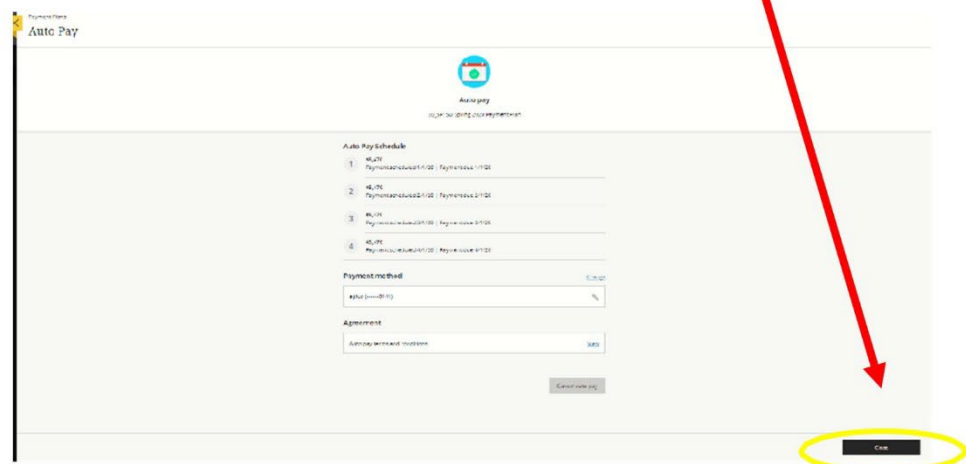
Payment plans

| Plan | Paid | Remaining |
|--|------------|-------------|
| 20_SP: SU Spring 2020 Payment Plan AUTO PAY | \$3,182.20 | \$12,728.80 |

- 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

- This section shows payment history for all payments made in the Transact Payment Portal.

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 | #48359 | \$531.22 |

5. Make A Payment Button

- Click the “Make a payment” link found at the bottom right corner of the Overview screen.
- On the payment screen, the payer can select the term and change the amount before submitting the payment as shown below.

Make a Payment

Pay amount

How much would you like to pay?

Balance items

Check all | 0 of 1 selected

| Description | Balance | Amount |
|--------------------------------------|-------------|-----------------------------|
| <input type="checkbox"/> (Fall 2022) | \$24,225.00 | \$0.00 <input type="text"/> |

Total balance \$24,225.00
Pay amount **\$0.00**
Remaining balance \$24,225.00

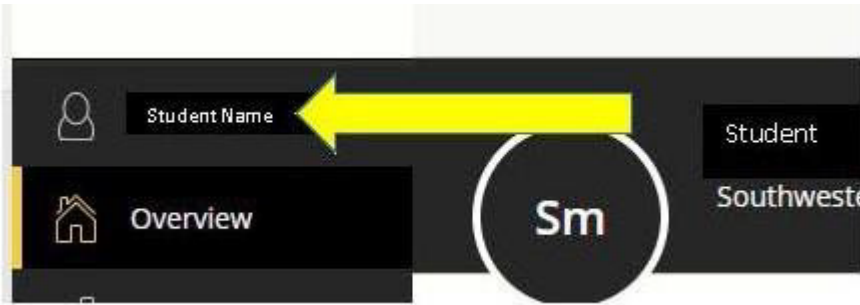
ates required field

sent 0 items **\$0**

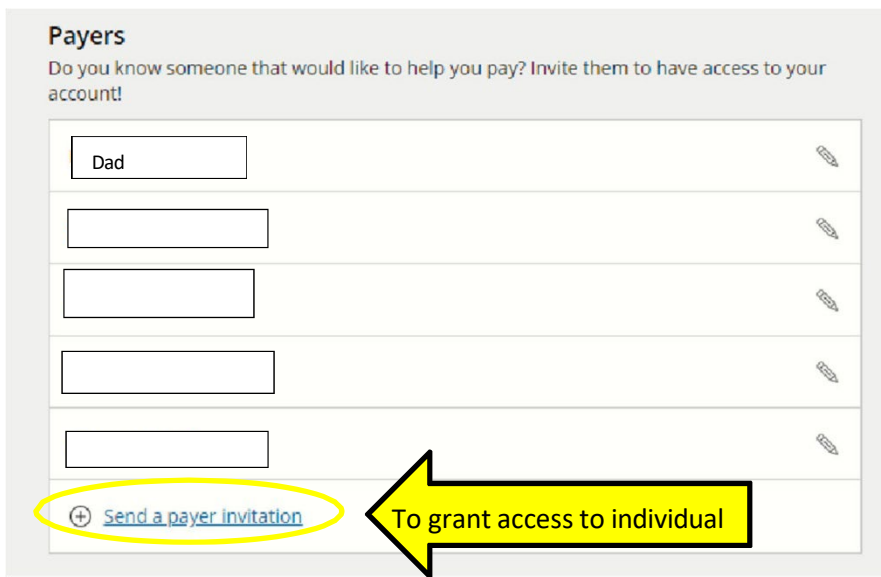


“Payers” Section – To send invitation to payer or manage existing payers

To 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.

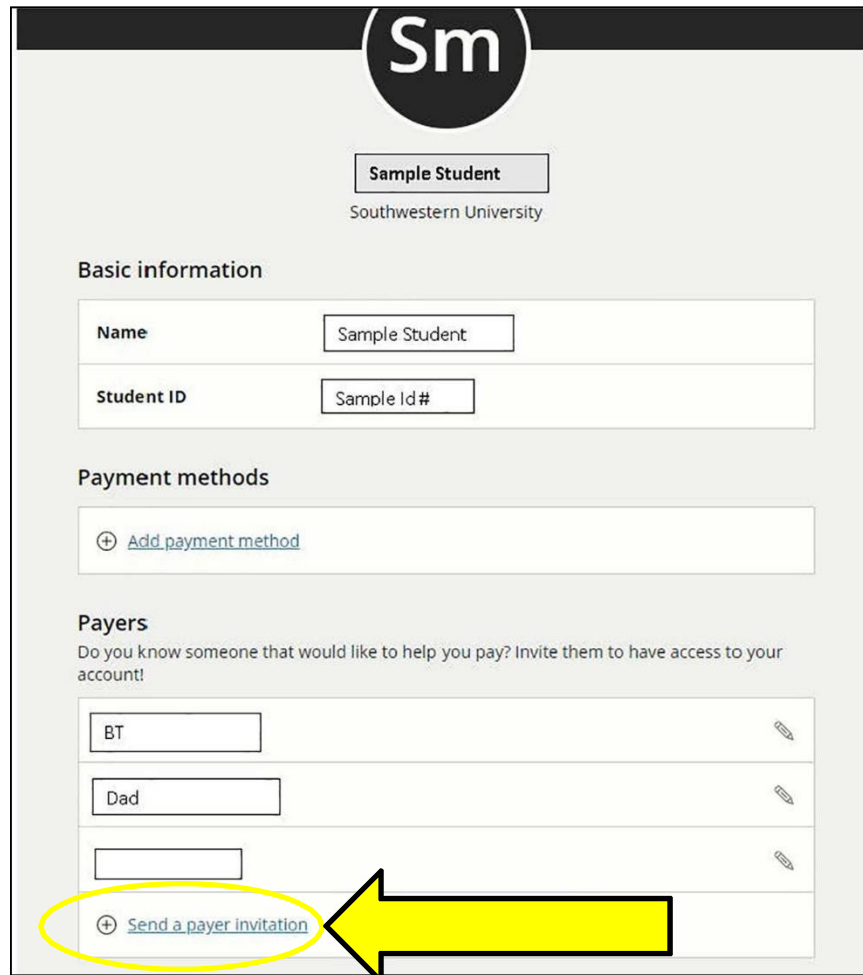
SETTING UP PAYER ACCESS

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



The screenshot displays the student portal interface for Southwestern University. At the top, there is a logo with the letters 'Sm' in a circle. Below the logo, the user is identified as 'Sample Student' at 'Southwestern University'. The page is divided into several sections: 'Basic information' with fields for 'Name' (Sample Student) and 'Student ID' (Sample Id#); 'Payment methods' with a '+ Add payment method' link; and 'Payers' with a list of existing payers: 'BT', 'Dad', and an empty field. At the bottom of the 'Payers' section, there is a '+ Send a payer invitation' link, which is circled in yellow. A large yellow arrow points from the right towards this link.

2. The student must provide the payer's name and email address. 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

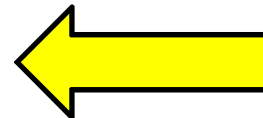
Payer access

Allow access to statements

Message to payer

Maximum 250 characters

Cancel Send Invitation



3. A welcome message will be sent to the new authorized payer's email address. 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.

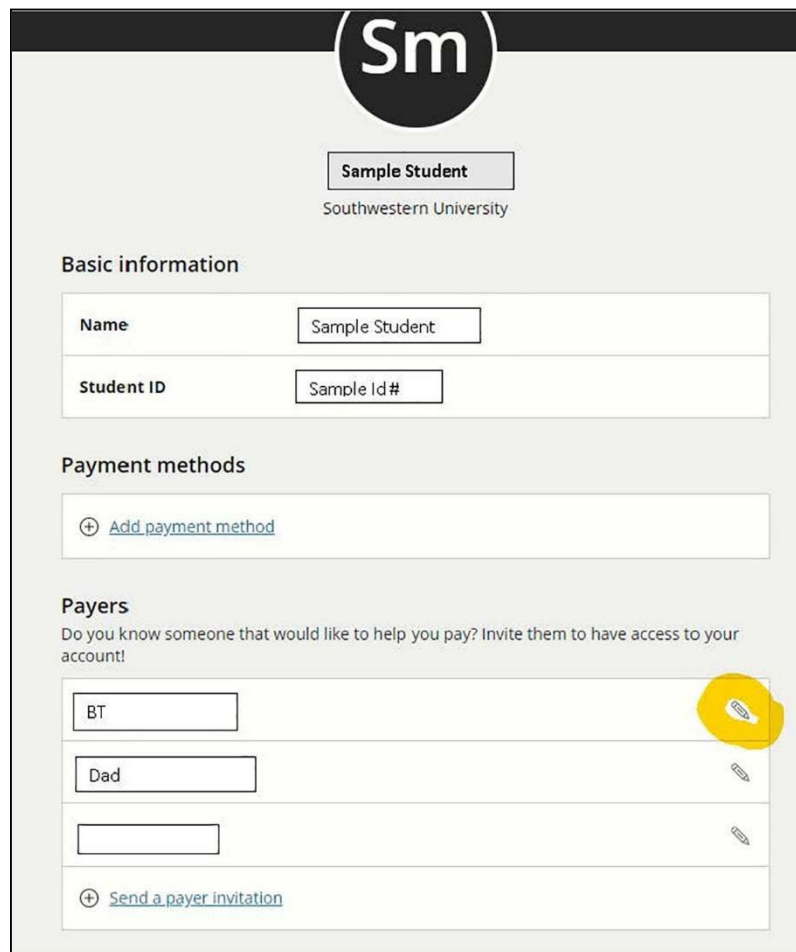
<https://commerce.cashnet.com/swupay?LT=P>

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



To Change Payer Access & Reset Passwords–

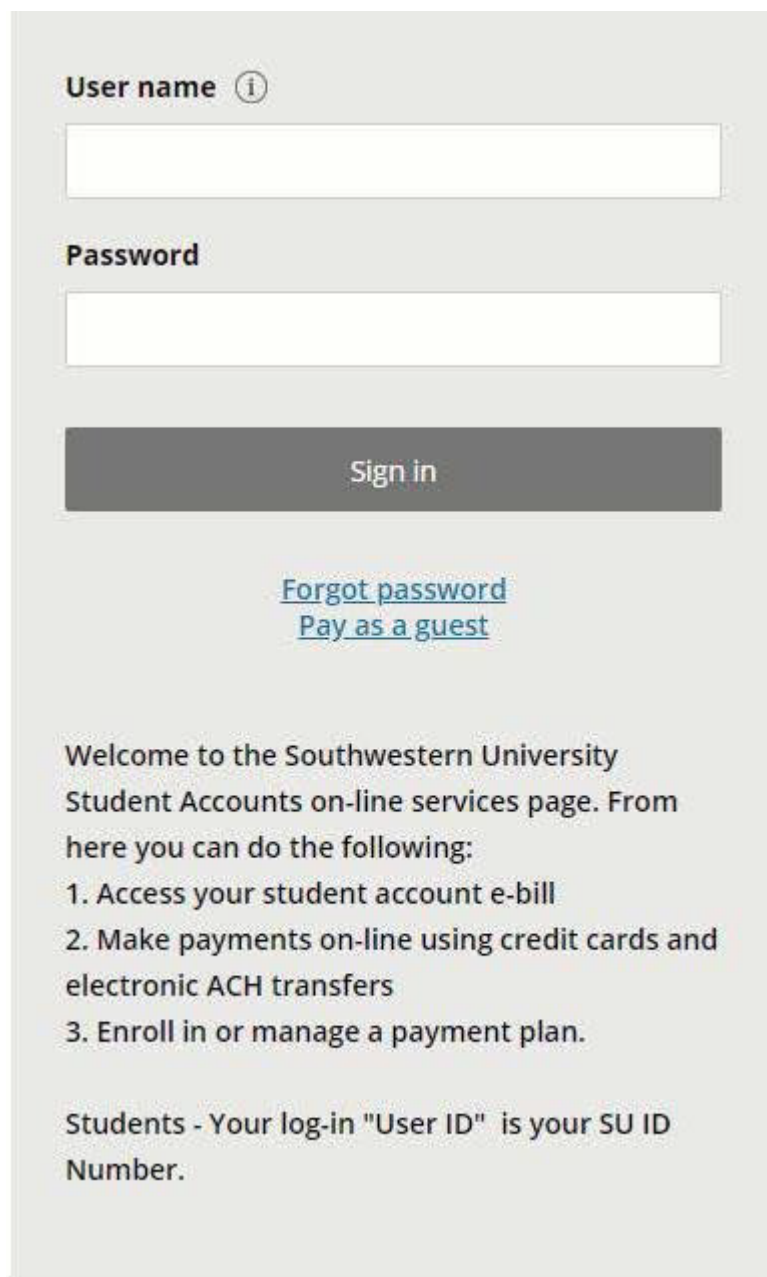
Select the “pencil” icon next to the payer to remove payer access or to resend a new invitation, if the password was forgotten.



The screenshot shows the Sm Southwestern University student account interface. At the top, the 'Sm' logo is displayed. Below it, the user is identified as 'Sample Student' at 'Southwestern University'. The page is divided into sections: 'Basic information' with fields for 'Name' (Sample Student) and 'Student ID' (Sample Id #); 'Payment methods' with a '+ Add payment method' link; and 'Payers'. The 'Payers' section includes a sub-header 'Payers' and a prompt: 'Do you know someone that would like to help you pay? Invite them to have access to your account!'. Below this are three rows, each with a text input field and a pencil icon. The first row contains 'BT', the second 'Dad', and the third is empty. A yellow circle highlights the pencil icon in the first row. At the bottom of the 'Payers' section is a '+ Send a payer invitation' link.

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 three items:
 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 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.

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 |

[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 e-checks.
- 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 (with a person icon), Overview (with a house icon), Make a Payment (with a credit card icon), Payments (with a document icon), Statements (with a calendar icon), and Sign Out (with a circular arrow icon). The main content area is titled 'Basic information' and contains a table with the following data:

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

Below this 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). Two yellow arrows are overlaid on the image: one points from the 'Name' menu item in the sidebar to the left, and the other points from the 'Notifications' section in the main content area to the right.