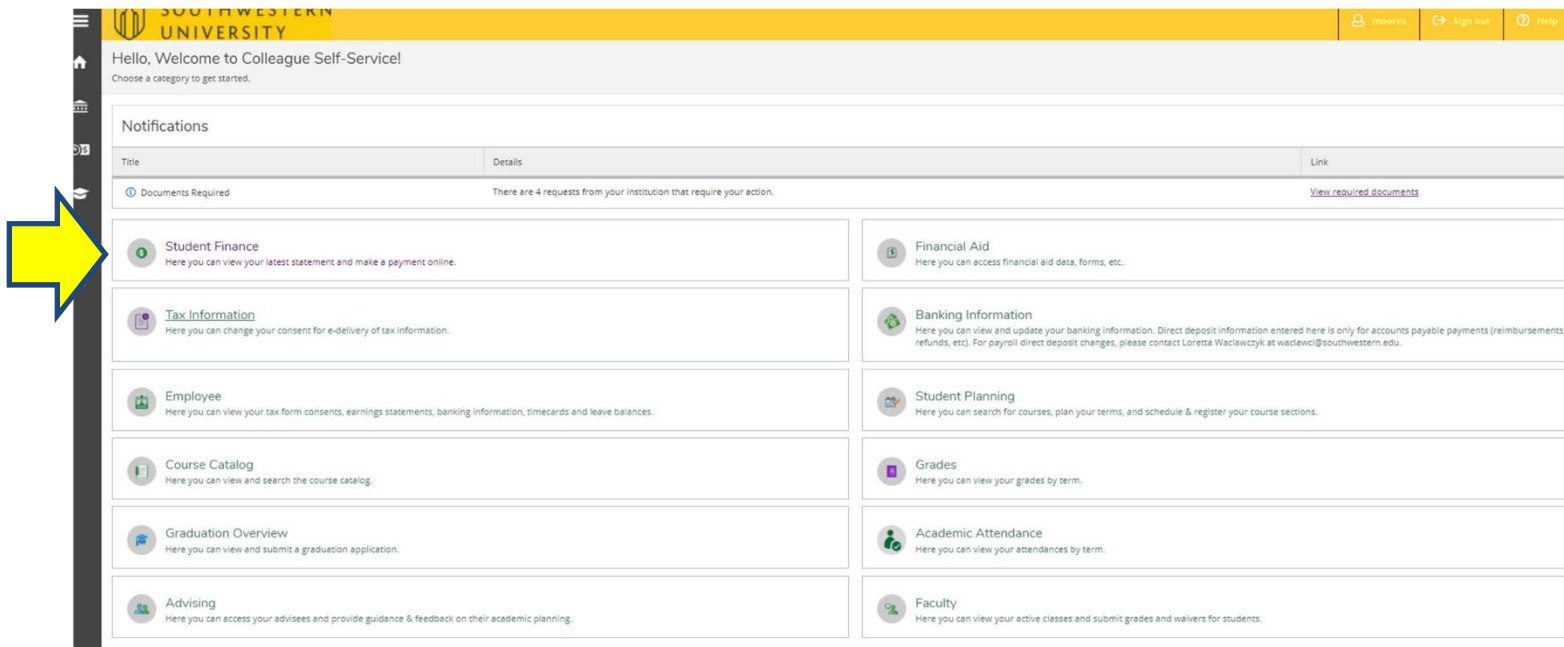# Accessing On-Line Student Account Detail & Transact Payments Portal

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 "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.**

SOUTHWESTERN UNIVERSITY

Financial Information · Student Finance · View E-Bill and Make a Payment

View E-Bill and Make a Payment

Payer Transact Payment Portal

Vi___ Make a Payment

Click on the link below to be connected to Transact Payments to access your Sou
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 st
information, **you must first send a payer invitation to the individual by going t
Account" section in the top left corner of the next page & completing the invi**
Once you have completed the set-up process, the authorized individual will be s
their ID, temporary password, and the necessary link to access your account. Au
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.**

SOUTHWESTERN UNIVERSITY

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

SOUTHWESTERN UNIVERSITY
Overview

Notifications

Student Name

Student Name
Sm

Balance
$21,880

Summary

E-Bills   View statements

20_SP (Spring 2020) $21,880.00

Balance $21,880.00

Payment plans

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.

Payment Plan   View payment plan options

Recent payments   View all

Make Pmts.   Make a payment

SOUTHWESTERN UNIVERSITY

Click NAME to access payers, saved payment methods, contact information, and notifications.

Student Name

Overview

Make a Payment

Payments

Statements

Sign Out

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.
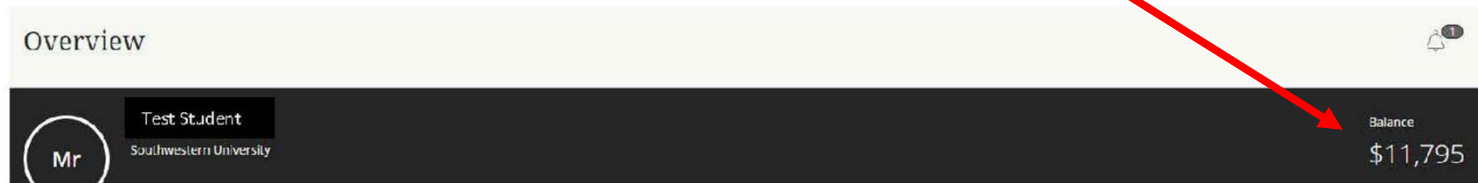
    - The Summary section then shows you the balance due by each term if applicable.

    - 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**
Minimum due	*$381.00*

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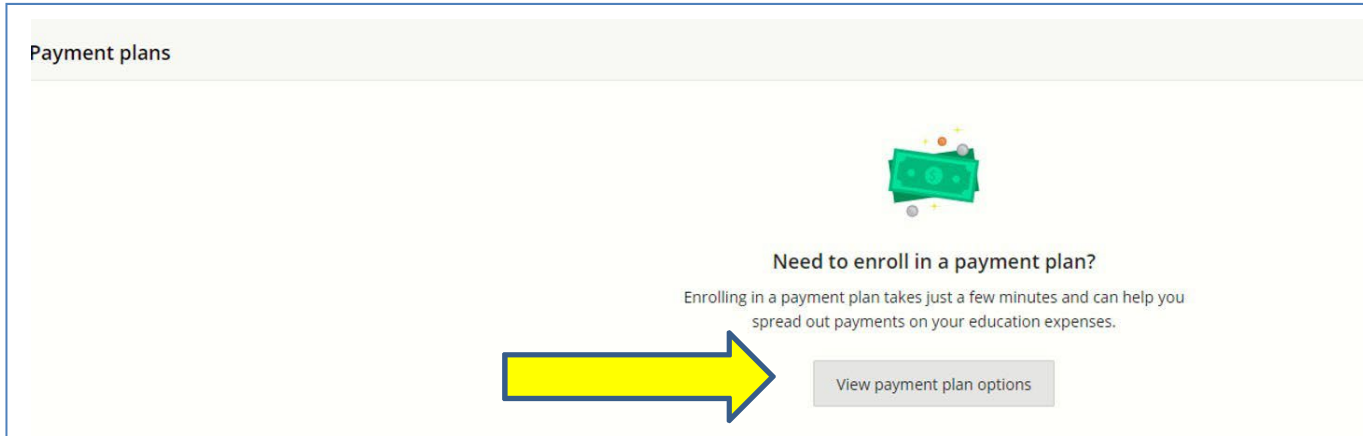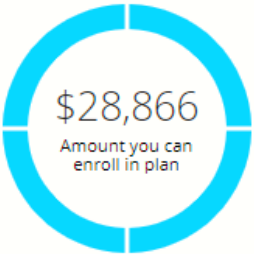
- After the link is clicked the following sidebar will appear:

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".

- The next screen will ask for a phone number.

- 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.

- To confirm and complete enrollment, click on the "Pay $25" link at the bottom right corner.

- 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.

- 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.**

- 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.

- 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.
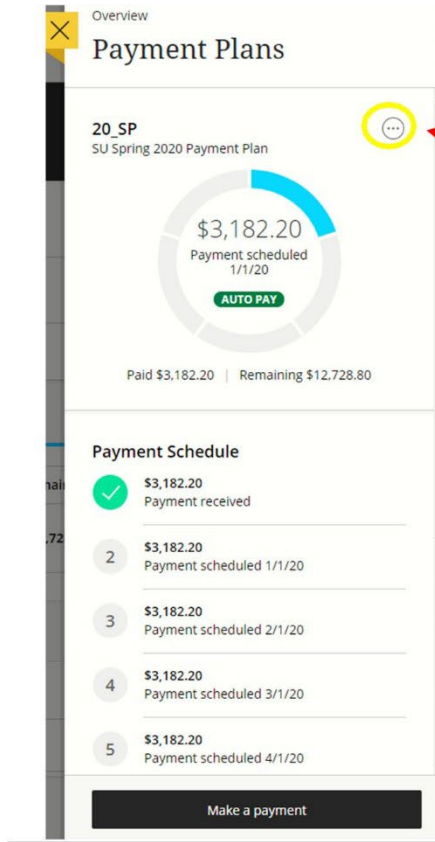
- To see details of the Auto Payment Plan, click on the circle with three dots in the upper right and choose "View Auto Pay."
- If you need to cancel your enrollment in auto pay select the "Cancel Auto Pay" button that is highlighted below
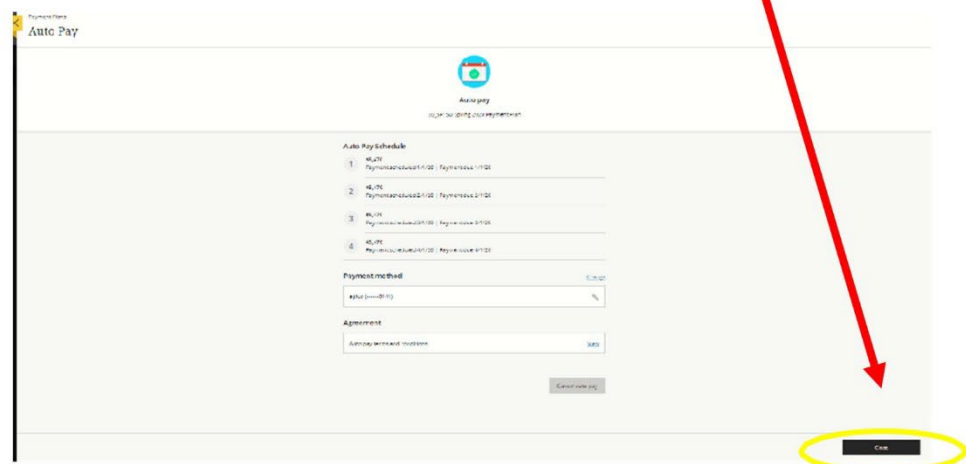
4. Recent Payments Section

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

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.

"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.
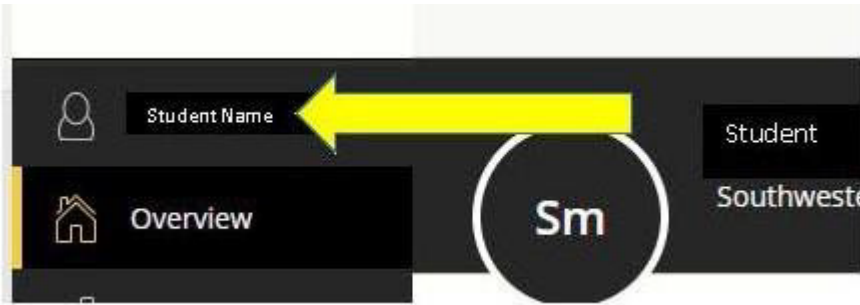
The Student profile page that appears includes a "Payers" section that lists the current authorized payers and provides a link to "Send a payer invitation" at the bottom of the screen.
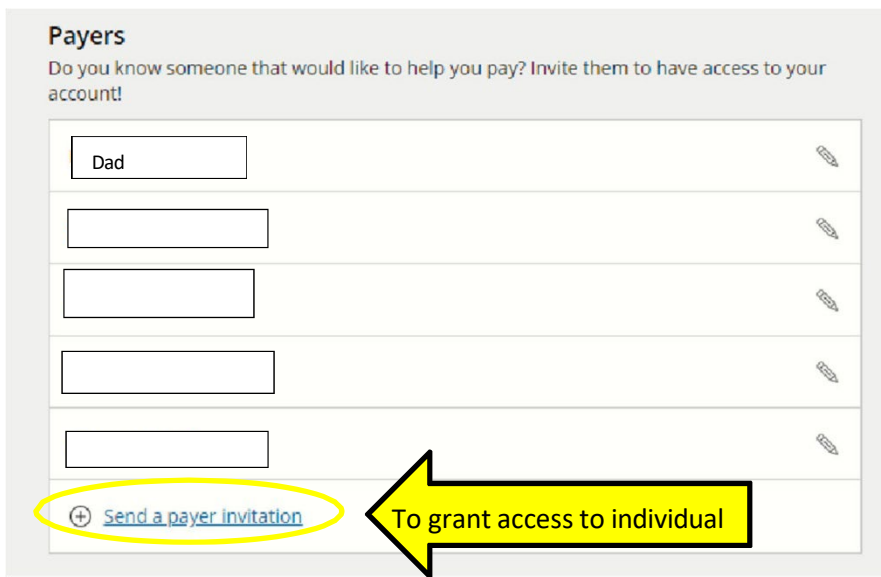
- This section is used to add and remove payer access.
- In order for parents or other individuals to receive online access to your student account to view e-bills, to receive alerts, to make on-line payments, or to setup a payment plan, the student must send the individual a "Payer Invitation" and give 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.
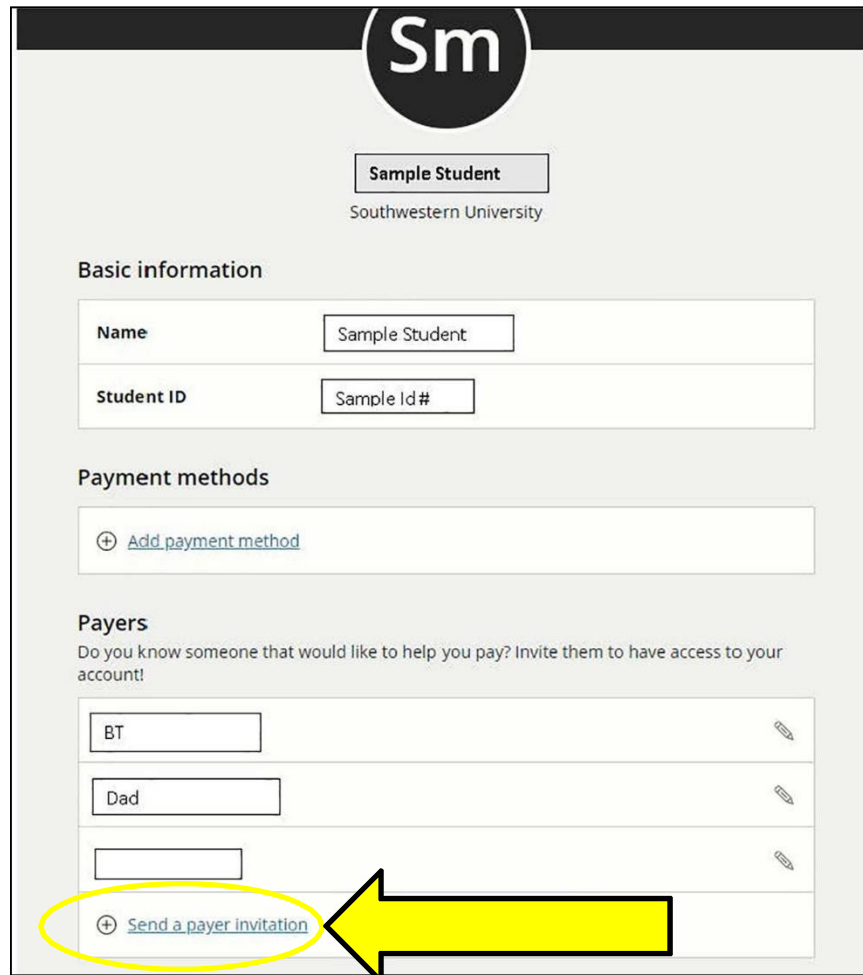
SETTING UP PAYER ACCESS
(This is a 2 Part process - Part 1 is completed by the student & Part 2 is completed by the payer.)

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.

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

[   ]

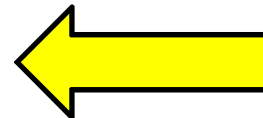* Email address

[   ]

* 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

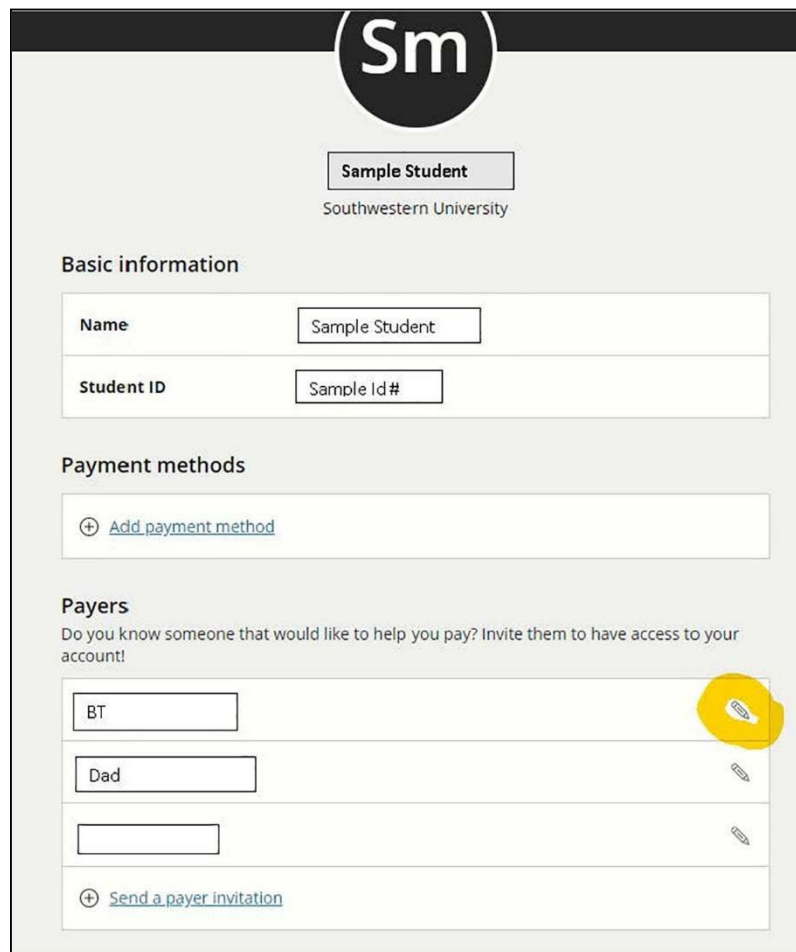To access the account, please click the link below.

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

(If clicking the link does not work, please copy and paste the information into your browser.)
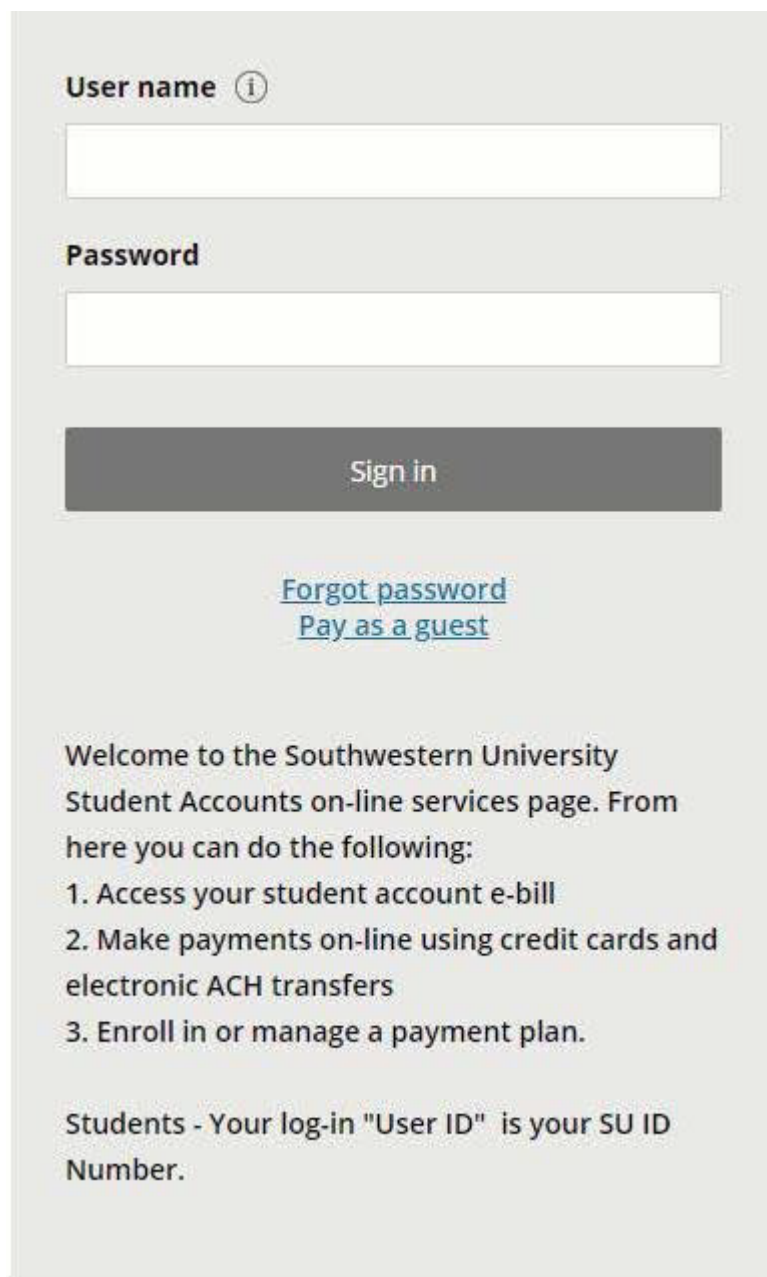
To Change Payer Access & Reset Passwords–

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

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 (i)

[   ]

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 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.

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.