

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:



SOUTHWESTERN UNIVERSITY

Hello, Welcome to Colleague Self-Service!
Choose a category to get started.

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.

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

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

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

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

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

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

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 waclawcl@southwestern.edu.

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

Grades
Here you can view your grades by term.

Academic Attendance
Here you can view your attendances by term.

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

- The “Payer Transact Payment Portal” 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.
- Please note that the balance referenced here does not include financial aid that has not been disbursed yet.

The screenshot displays the Southwestern University Student Accounts portal. The top navigation bar includes links for Financial Information, Student Finance, and Account Activity. A dropdown menu is open under 'Account Activity', showing options for Account Activity, Payer Transact Payment Portal (highlighted with a yellow arrow), and Convera GlobalPay. Below the dropdown, the term 'Fall 2025 - Balance: \$28,109.00' is displayed. A summary section shows 'Charges \$28,109.00' and 'Balance \$28,109.00' with an 'Expand All' button. The bottom section shows a table with 'Charges' and 'Balance' rows, both totaling \$28,109.00. The footer contains copyright information for Ellucian Company L.P. and its affiliates.

Apps Southwestern Links Home Page - South... datatel-production https://firsttexas-gt... Student Accounts ecsi web reports CASHNet Directory • Southwe... Test Datatel Colleg... train CASHNet parents paytrain Log In- CONSERVE

SOUTHWESTERN UNIVERSITY moores Sign out Help

Financial Information • Student Finance • Account Activity

Account Activity View y

Payer Transact Payment Portal

Convera GlobalPay

Term Fall 2025 - Balance: \$28,109.00

Charges \$28,109.00 = Balance \$28,109.00

Expand All

Charges \$28,109.00

Balance \$28,109.00

View Statement

Top of page

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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 sidebar 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 sidebar below. Yellow arrows point to various features: 'Notifications' (top right), 'E-Bills' (right side, pointing to 'View statements'), 'Payment Plan' (center, pointing to 'View payment plan options'), and 'Make Pmts.' (bottom right, pointing to 'Make a payment').

Overview

Student Name: [Redacted] Balance: \$21,880

Summary

Item	Amount
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.

[View payment plan options](#)

Recent payments

[View all](#)

SOUTHWESTERN UNIVERSITY

Student Name: [Redacted]

- Overview
- Make a Payment
- Payments
- Statements
- Sign Out

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.

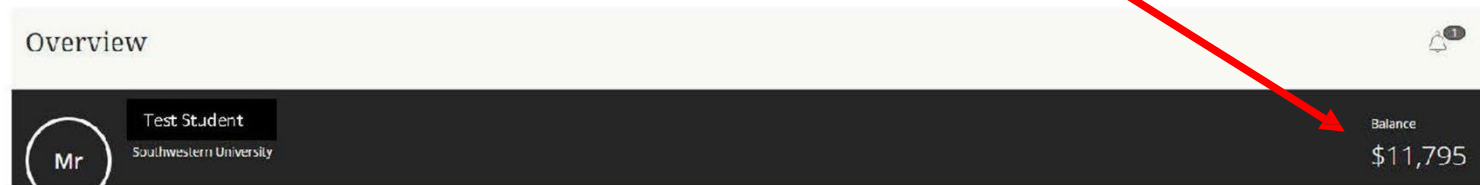
1. Notification Section –



- 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 –

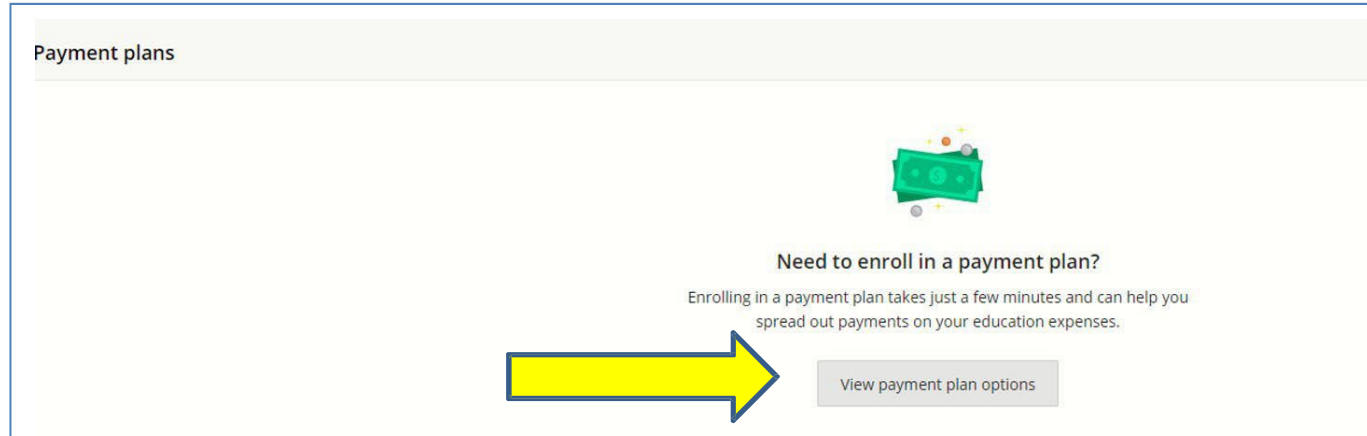
Statements			
Date	Description	View	Save
12/2/19	SWU Bill		
11/14/19	SWU Bill		
7/9/19	SWU Bill		
6/27/19	SWU Bill		
4/26/19	SWU Bill		
11/30/18	SWU Bill		
11/9/18	SWU Bill		
7/5/18	SWU Bill		
5/1/18	SWU Bill		

- 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

Payment due 1/1/20	Payment due 2/1/20	Payment due 3/1/20	Payment due 4/1/20
\$1,250.00	\$1,250.00	\$1,250.00	\$1,250.00

Terms and Conditions

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

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

- The next screen will ask for a phone number.

Payment Plan Enrollment

Student Information

Phone Number

1 (250) 123-4567

- 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 JCB MasterCard VISA

* Card number

① Card number required

* Expiration date * 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:

Cancel Continue

- 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

emailaddress@email.com

All notifications regarding this payment plan will be sent to the email address(es) saved in your profile.

Summary

20_SP: SU Spring 2020 Payment Plan

Enrollment fee \$25

Payment details

Account holder name

Name of Account owner

Account type

Savings

Bank account number

*****4499

Saved payment method

ZhangSavings

Enrollment information

Phone Number

5125551212

This site is protected by reCAPTCHA and the Google [Privacy Policy](#) and [Terms of Service](#) apply.

Cancel

Pay \$25

- An email is sent with the terms and conditions.

studentaccounts@southwestern.edu

to me

Dec 11, 2019, 11:17 AM (2 days ago)

Thank you for enrolling in the SU Spring 2020 Payment Plan.

You will be billed on the following dates for the amounts shown:

\$5,470.00 due on 01/01/2020

\$5,470.00 due on 02/01/2020

\$5,470.00 due on 03/01/2020

\$5,470.00 due on 04/01/2020

Please note the financial information disclosed below:

ANNUAL PERCENTAGE RATE: 0.00%

FINANCE CHARGE: \$0.00

Amount financed: \$0.00

Total Payments: \$0.00

Total Sales Price: \$0.00

Down Payment: \$0.00

Please refer to the terms and conditions for information about non-payment, default, and right to accelerate.

Your enrollment in this plan is based on your agreement to the following terms and conditions:



Southwestern University Payment Plan Agreement Terms & Conditions By enrolling in the Southwestern University Monthly Payment Plan (payment plan), I agree to the following terms and conditions: As a student enrolled in classes at Southwestern University, I agree to assume full financial responsibility for all charges incurred on my student account whether I attend the classes or not. I further understand that my failure to be fiscally responsible may result in service holds, late fees, collection actions by Southwestern University and other third-party agencies, unfavorable credit bureau filing, and/or litigation and I will assume all costs associated with such actions. 1. Student Eligibility. a. Must be enrolled in the current semester at Southwestern University. b. Must be current on charges owed to Southwestern University and all prior term student account balances must be zero. c. Must have no holds on your student account from SU departments or previous collection activities. 2. Enrollment: a. Online enrollment for the Southwestern University payment plan must be done in accordance with the Southwestern University payment plan schedule. If you are ineligible to participate, the Southwestern University payment plan system will not allow you to enroll. b. A \$25 enrollment fee is due at the time of enrollment. Enrollment will not be complete without first paying the \$25 enrollment fee. c. The enrollment fee is non-refundable. d. If more than one payment plan is needed for the semester, contact Student Accounts BEFORE setting up a plan at 512-863-1928 or SUPaymentPlan@southwestern.edu for assistance. e. Enrollment in the plan is for the specific term only and is not automatic for subsequent semesters. A new agreement is needed each semester a plan is desired. 3. Student Account: a. Your student account is the system of record for all transactions – tuition, fees, payments, financial aid, meal plans, housing, etc. b. Confirmed financial aid reduces the account balance prior to enrolling in the plan. c. Your payment plan is distributed evenly over the remaining monthly installments. The number of payments depends on when you enroll in your payment plan and can be up to 5 monthly payments. d. If additional student account charges or credits are incurred after initial enrollment in the plan, the plan amount will recalculate and the monthly payment plan amount due on the remaining payments will be increased or decreased accordingly. e. Financial Aid adjustments will also increase or decrease future monthly payment plan amounts. The plan amount will recalculate and the amount due on the remaining payments will be adjusted accordingly. 4. Delinquent Accounts: a. Failure to pay the monthly amount due will result in an administrative hold being placed on your student record. This administrative hold will prevent future

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.

Overview
Payment Plans

20_SP
SU Spring 2020 Payment Plan

\$3,182.20
Payment scheduled 1/1/20
AUTO PAY

Paid \$3,182.20 | Remaining \$12,728.80

Payment Schedule

✓	\$3,182.20 Payment received
2	\$3,182.20 Payment scheduled 1/1/20
3	\$3,182.20 Payment scheduled 2/1/20
4	\$3,182.20 Payment scheduled 3/1/20
5	\$3,182.20 Payment scheduled 4/1/20

Make a payment

- 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

Payment Plans
Auto Pay

Auto pay
SU SPRING 2020 PAYMENT PLAN

Auto Pay Schedule

1	\$3,182.20 Payment scheduled 1/1/20
2	\$3,182.20 Payment scheduled 2/1/20
3	\$3,182.20 Payment scheduled 3/1/20
4	\$3,182.20 Payment scheduled 4/1/20

Payment method
Credit Card

Agreement
Auto pay agreement

Cancel auto pay

Done

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


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

ates required field

ent 0 items

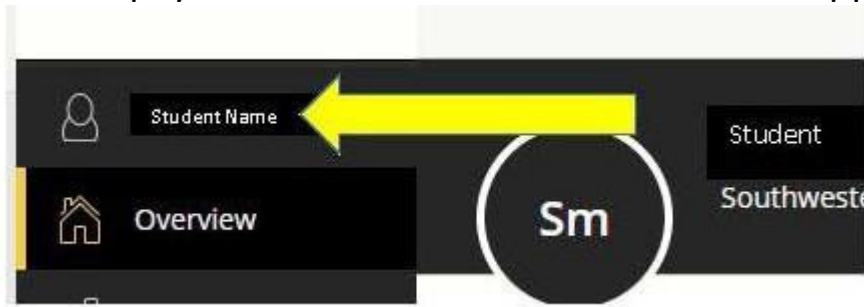
\$0

Cancel Checkout

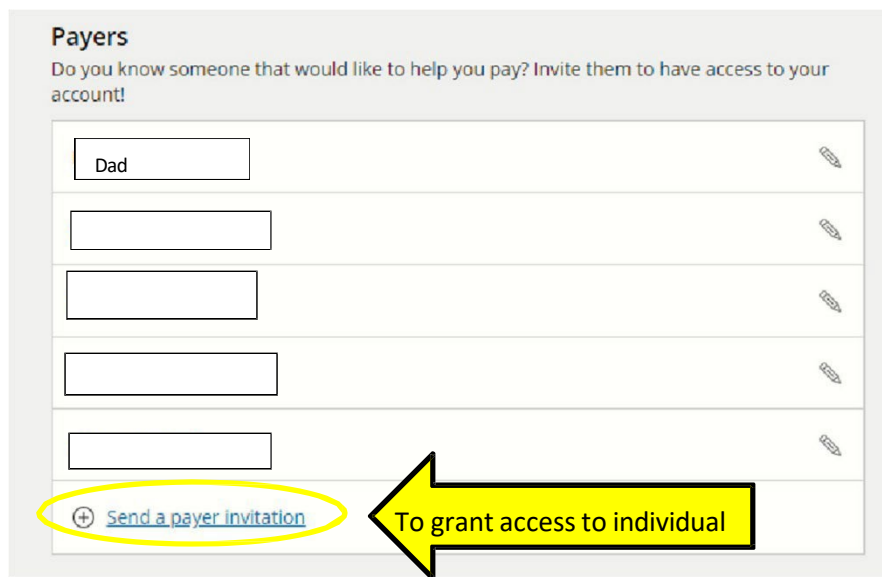


“Payers” Section – To send invitation to payer or manage existing payers

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.

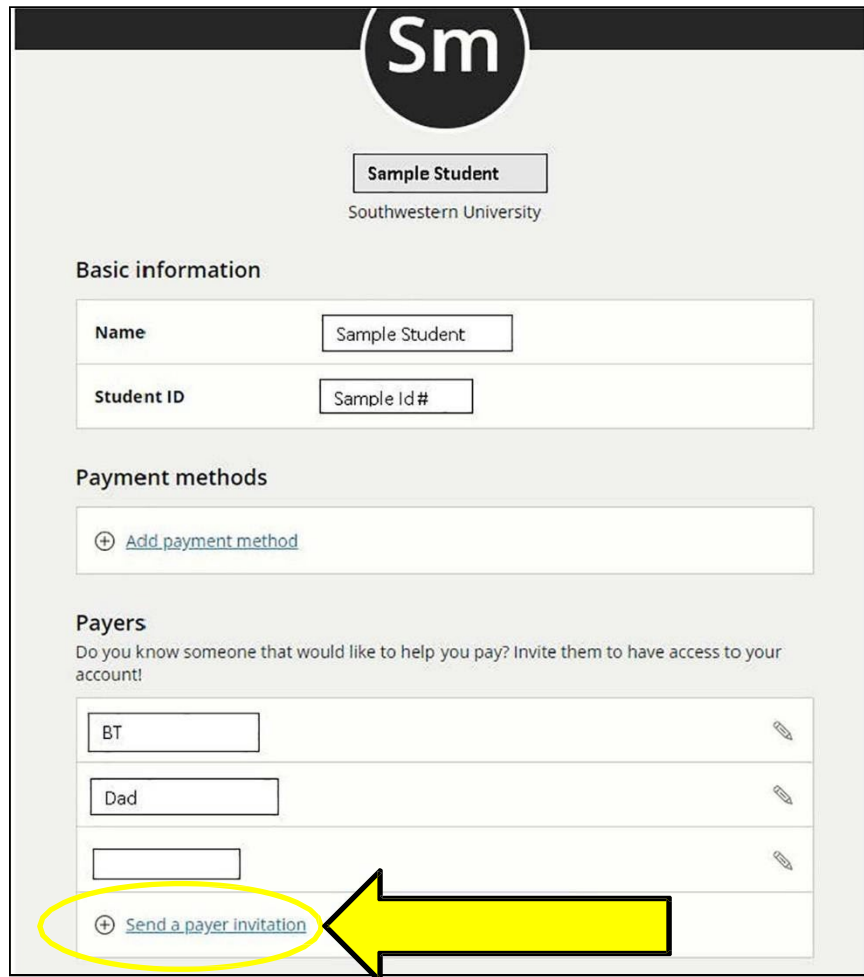
SETTING UP PAYER ACCESS

(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.



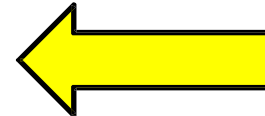
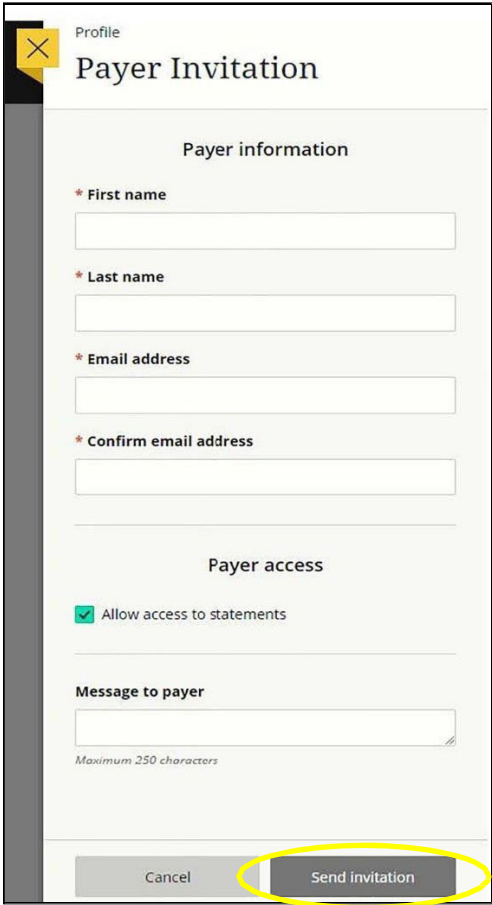
The screenshot displays the Southwestern University (Sm) student portal interface. At the top, the 'Sm' logo is visible. Below it, a box identifies the user as 'Sample Student' at 'Southwestern University'. The page is divided into sections: 'Basic information' with fields for 'Name' (Sample Student) and 'Student ID' (Sample Id #); 'Payment methods' with a link to 'Add payment method'; and 'Payers'. The 'Payers' section includes a prompt: 'Do you know someone that would like to help you pay? Invite them to have access to your account!'. Below this prompt is a table with three rows. The first row contains 'BT', the second 'Dad', and the third is empty. Each row has a pencil icon for editing. At the bottom of the 'Payers' section, there is a link '+ Send a payer invitation', which is circled in yellow. A large yellow arrow points from the right towards this link.

Basic information	
Name	Sample Student
Student ID	Sample Id #

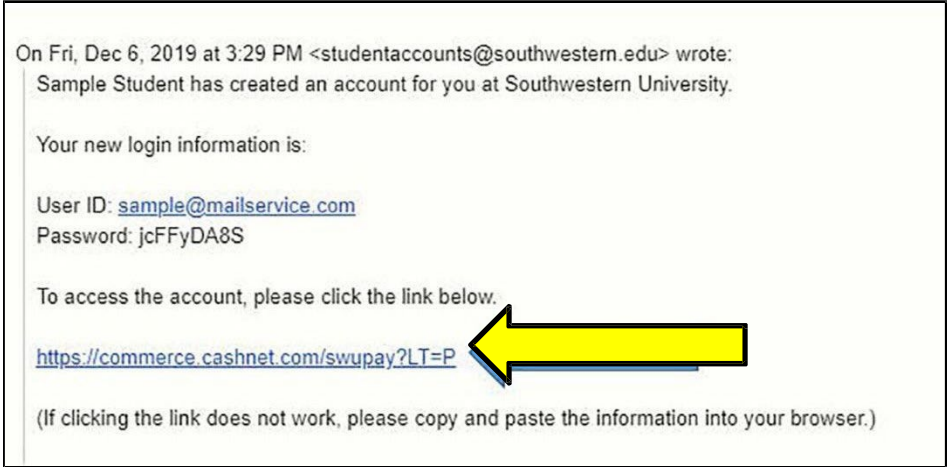
Payment methods	
+ Add payment method	

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	

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.



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.



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!

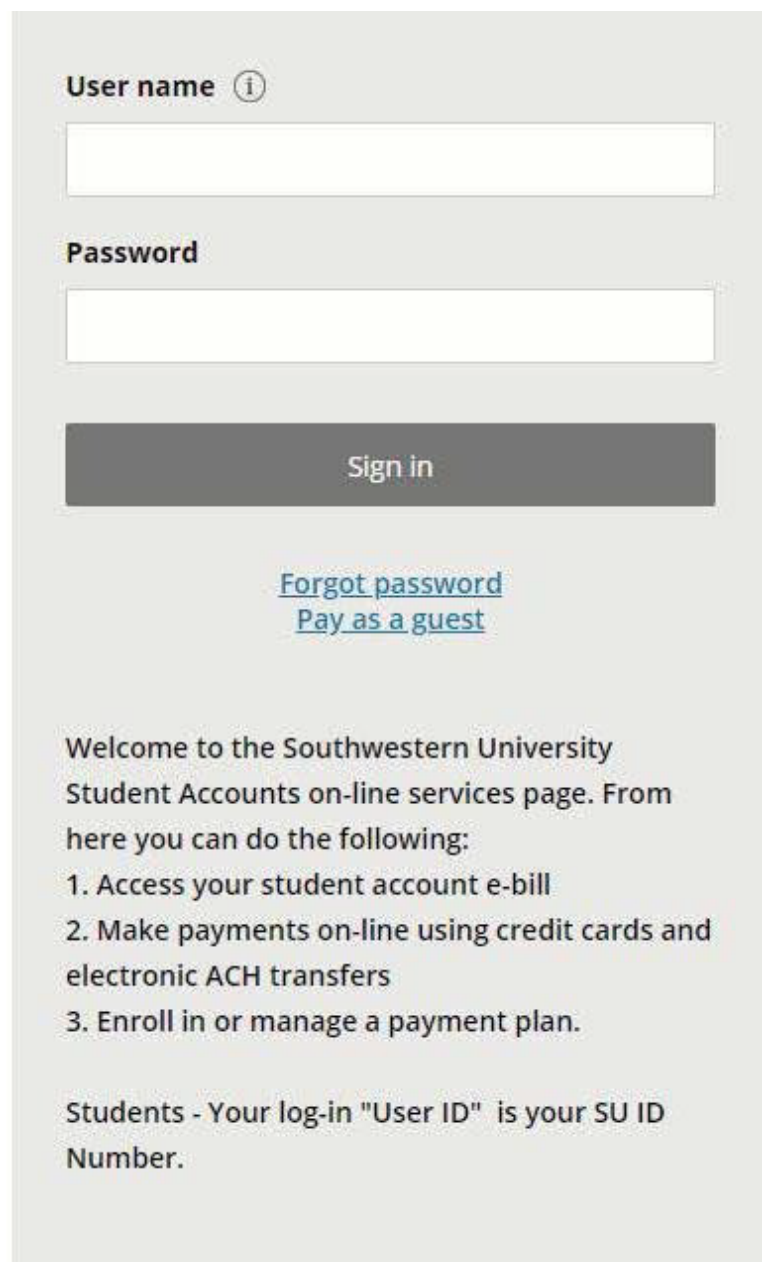
BT

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 login interface for Southwestern University's Student Accounts on-line services. It features two input fields: 'User name' with an information icon (i) and 'Password'. Below these fields is a dark grey 'Sign in' button. Under the button are two links: 'Forgot password' and 'Pay as a guest'. At the bottom, a welcome message states: 'Welcome to the Southwestern University Student Accounts on-line services page. From here you can do the following:' followed by a numbered list: 1. Access your student account e-bill, 2. Make payments on-line using credit cards and electronic ACH transfers, and 3. Enroll in or manage a payment plan. The final line reads: 'Students - Your log-in "User ID" is your SU ID Number.'

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 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.


SOUTHWESTERN
UNIVERSITY


Overview





Name

Overview

Make a Payment

Payments

Statements

Sign Out

Sm

Test Parent

Balance
\$21,880

Summary

[View statements](#)

20_SP: SU Spring 2020 Payment Plan

\$21,880.00


Auto payment scheduled 1/1/20

\$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

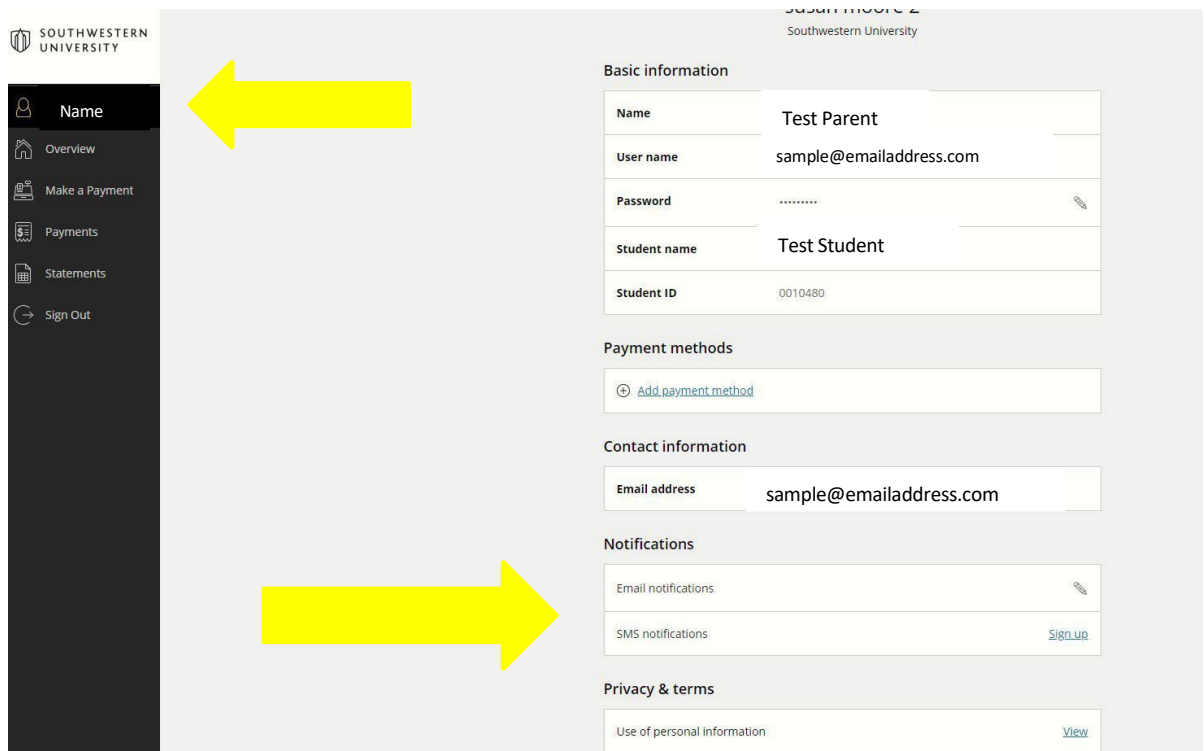
[View all](#)

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

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 with a menu. The 'Name' menu item is highlighted with a yellow arrow. The main content area on the right is titled 'Basic information' and contains several sections: 'Basic information' with fields for Name (Test Parent), User name (sample@emailaddress.com), Password (masked), Student name (Test Student), and Student ID (0010480); 'Payment methods' with an 'Add payment method' button; 'Contact information' with an 'Email address' field (sample@emailaddress.com); 'Notifications' with 'Email notifications' and 'SMS notifications' fields (the latter has a 'Sign up' link); and 'Privacy & terms' with a 'Use of personal information' field (has a 'View' link). A yellow arrow points from the 'Name' menu item to the 'Basic information' section.

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
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