

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 Transact Payment Portal is found in the "Student Finance" section:

The screenshot displays the Southwestern University Colleague Self-Service portal. On the left, a dark sidebar contains a menu with the following items: Home, Financial Information (expanded), Student Finance, Account Activity, Payer Transact Payment Portal (highlighted with a green circle), Convera GlobalPay, Financial Aid, Tax Information, Banking Information, Employment, Academics, Daily Work, and User Options. The main content area features a yellow header with the Southwestern University logo and the text 'Hello, Welcome to Colleague Self-Service! Choose a category to get started.' Below this, a grid of service tiles is presented, each with an icon and a brief description: Student Finance, Financial Aid, Tax Information, Banking Information, Employee, Course Catalog, Student Planning, Grades, Employment, Academics, Daily Work, and User Options.

Category	Service	Description	
Financial Information	Student Finance	Here you can view your latest statement and make a payment online.	
	Financial Aid	Here you can access financial aid data, fo	
	Tax Information	Here you can change your consent for e-delivery of tax information.	
	Banking Information	Here you can view and update your bank only for accounts payable payments (reir please contact Karla Shaver at shaverk@:	
Student Finance	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.	
	Student Planning	Here you can search for courses, plan yo	
	Grades	Here you can view your grades by term.	
Employment	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.	
	Academic Attendance	Here you can view your attendances by t	
	Faculty	Here you can view your active classes an	
Academics	Departmental Oversight	Here you can access your department faculty and view their sections.	
	Financial Management	Here you can view the financial health of	
	Daily Work		
	User Options		

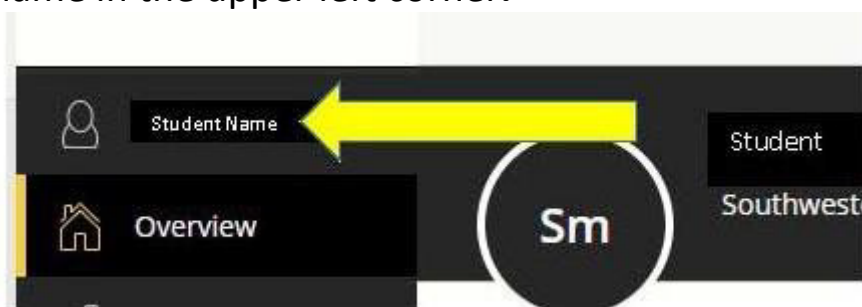
SETTING UP PAYER ACCESS

(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.

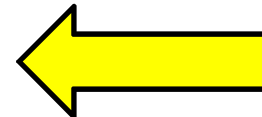
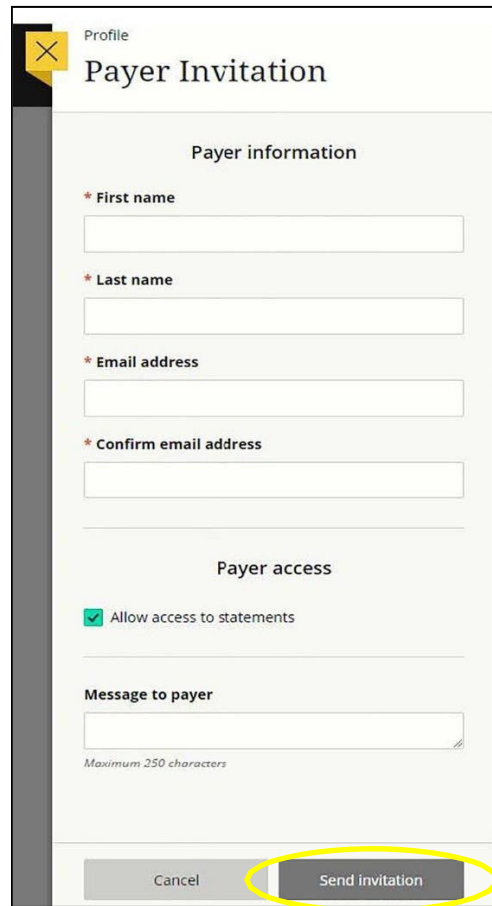
1. To find the area where a student can add a new payer, click on the student name in the upper left corner.



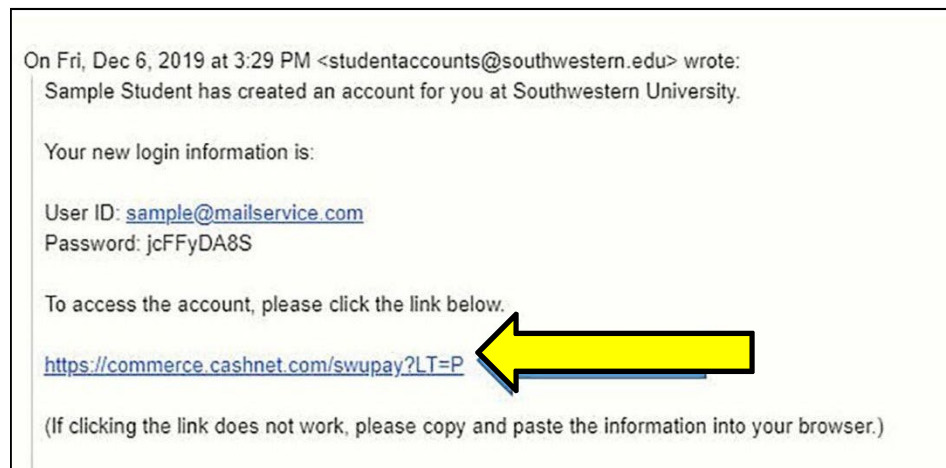
2. To set up a parent or other individual with access, the student must select the "Send a Payer Invitation" link as shown below.

A screenshot of a student account dashboard. At the top, there is a dark header bar with the letters "Sm" in a circle. Below this, there is a box labeled "Sample Student" with "Southwestern University" underneath. The main content area 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" with a list of existing payers (BT, Dad) and a link to "Send a payer invitation". A yellow arrow points to the "Send a payer invitation" link, which is circled in yellow.

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 send the invitation, click on the "Send invitation" link.



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.



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!

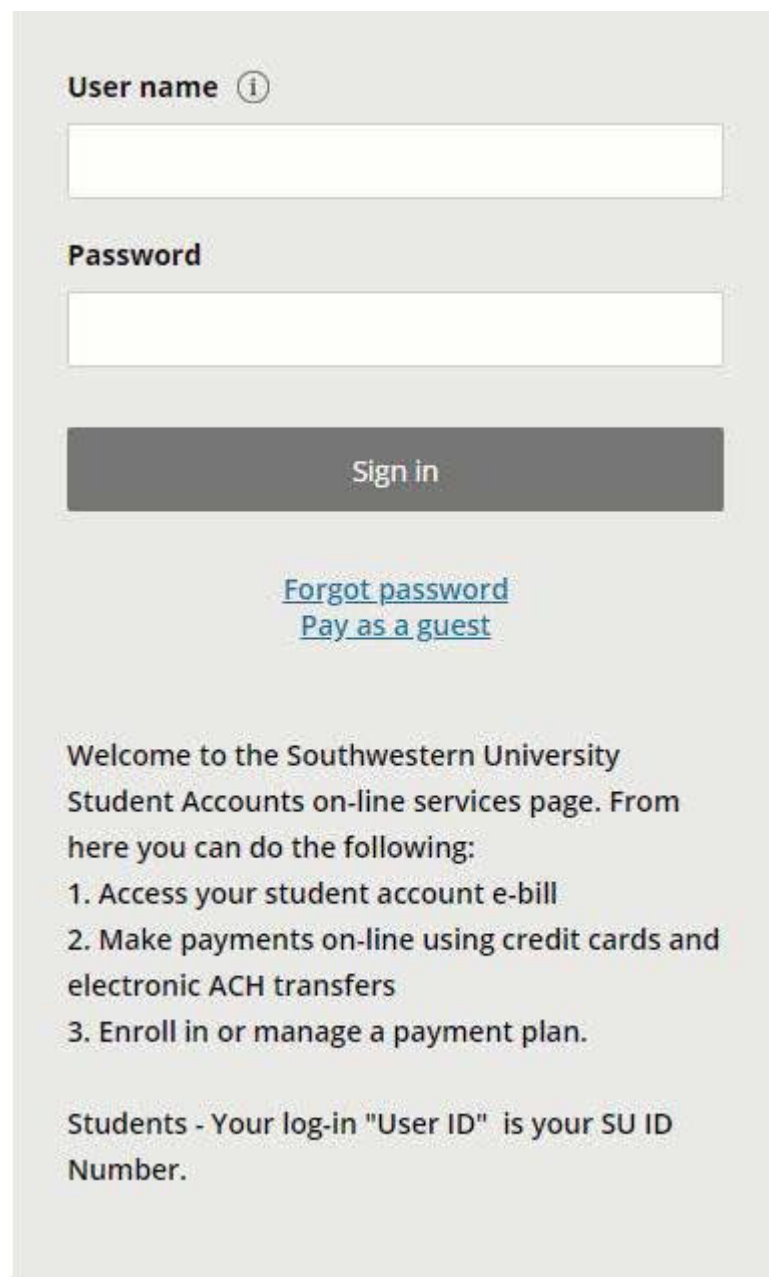
BT

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 web page for logging into Southwestern University Student Accounts. It features a 'User name' field with an information icon, a 'Password' field, and a 'Sign in' button. Below the button are links for 'Forgot password' and 'Pay as a guest'. A welcome message and a list of services are provided at the bottom.

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.

 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
Auto payment scheduled 1/1/20

Balance

\$21,880.00
\$5,470.00

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 pointing to it. The main content area on the right is titled 'Basic information' and contains several sections: 'Basic information' (with fields for Name, User name, Password, Student name, and Student ID), 'Payment methods' (with an 'Add payment method' button), 'Contact information' (with an 'Email address' field), 'Notifications' (with 'Email notifications' and 'SMS notifications' fields), and 'Privacy & terms' (with a 'Use of personal information' field). A yellow arrow points from the 'Name' menu item to the 'Basic information' section.

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](#)