Payment Plans FAQ

This guide contains answers to common questions about payment plans for your campus's tuition payments.
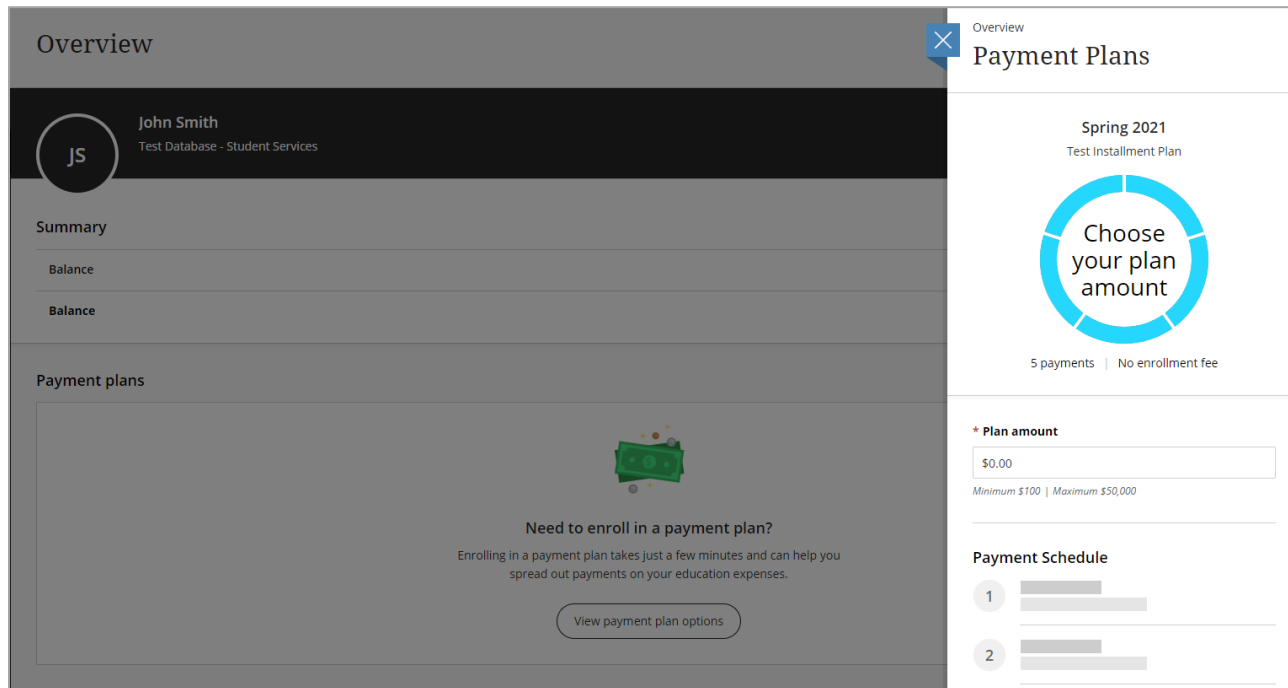
Contents

How do I enroll in or edit a payment plan?

Enrolling in a payment plan

To enroll in a payment plan:

1. On the Overview page click **View payment plan options**.
2. In the Payment Plan sidebar, review and select the payment plan you want to enroll in.
3. Follow the instructions to complete enrollment.

Figure 1: Payment Plan Sidebar

Editing a payment plan

Some payment plans can be updated by the student or authorized user after enrollment.

To edit a payment plan you are already enrolled in:

1. Log in to the Transact portal.
2. Select **Payment Plans** in the left-hand pane.
3. Select the payment plan that needs adjustment.
4. Click on the ellipsis (3 dots) on the upper right-hand corner.
5. Select **Edit amount**.

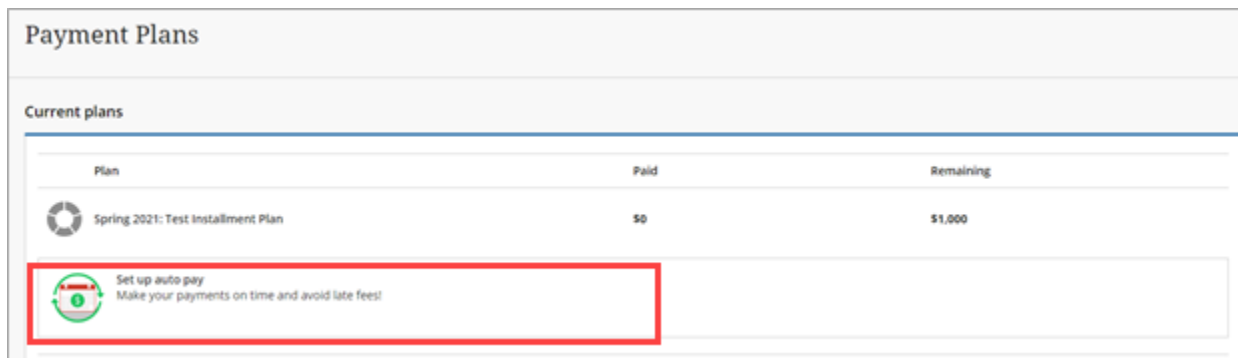**Figure 2: "Edit amount" Link in Payment Plans Details**
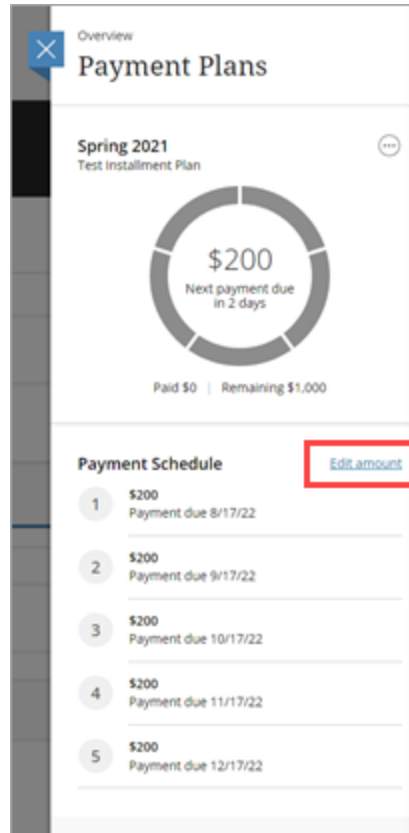
How do I set up or deactivate auto pay?

Setting up auto pay

To set up auto pay:

1. In the left pane, select **Payment Plans**.
2. Select the payment plan you want to enroll in auto pay and click **Set up auto pay**.

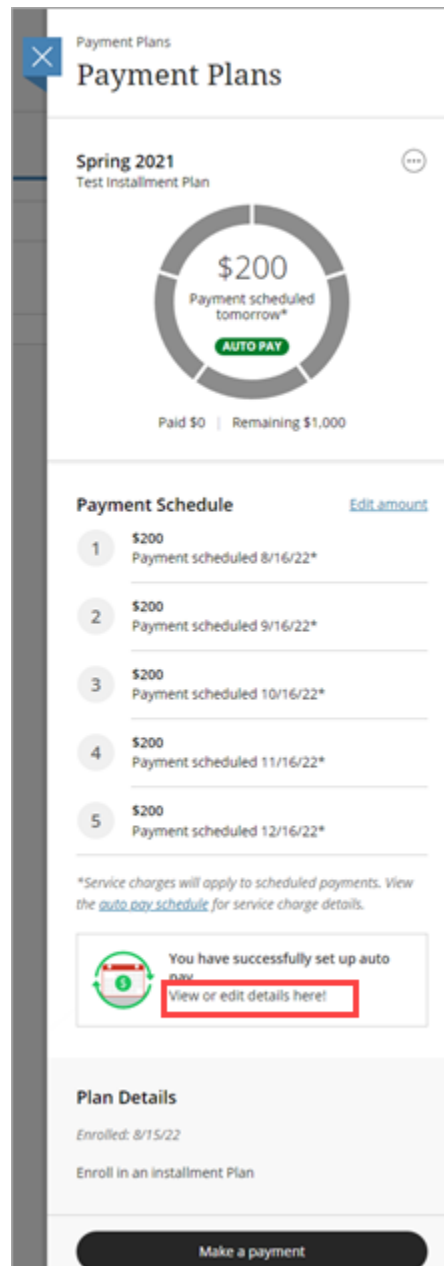**Figure 3: Selecting a Plan and Setting Up Auto Pay**

3. Follow the instructions on the screen.

Editing or deactivating auto pay

To edit or deactivate auto pay:

1. In the left pane, select **Payment Plans**.
2. Select the auto payment plan you want to cancel.
3. Select V**iew or edit details here!** below the plan schedule.

Figure 4: Link to View or Edit Auto Pay

4. Select to cancel or change the auto pay plan details.

Where can I find my 1098-T form or billing statements?

Locating your 1098-T tax form

To locate your 1098-T tax form, click **Tax Forms** in the left-hand pane.

Note: If the Tax Forms option is not available, please contact your school's student account office for assistance. For your school's phone number, check your school's website or click **Help** in the left-hand pane.

Locating your billing statement

To locate billing statements, click **Statements** in the left-hand pane.

How do I reset my password or my payer invite password?

Resetting your password via payer invite

The reset password option depends on the school's configuration of Transact Payments. Some schools have the Reset Password option available on the login page. Other schools do not, and the student must resend the payer invitation to the authorized user to reset their password, as shown in the image below.
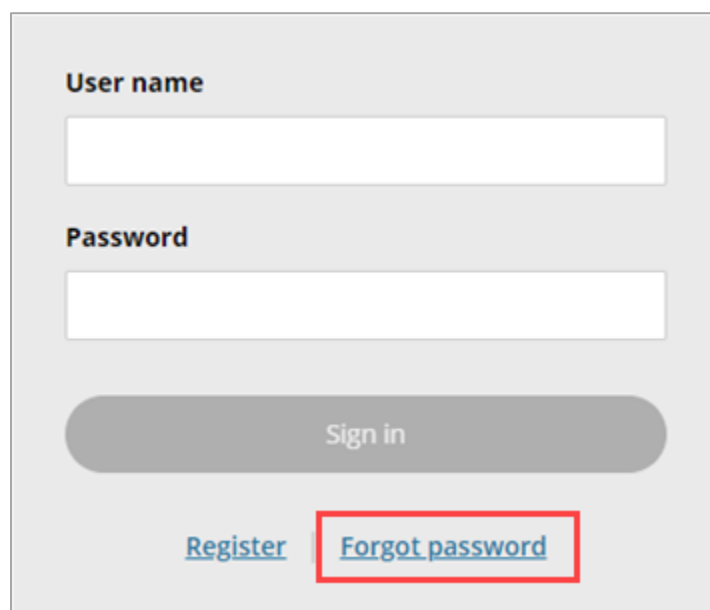
Figure 5: Resend Payer Invitation Button
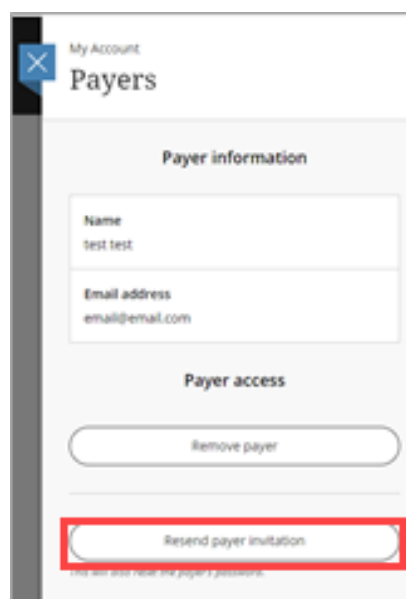
Resetting the student password through the login page

If available, students can reset their password through the ePayment site by clicking the **Forgot password** link. Note that most schools manage logins directly through their student portal and this option is not available.

Figure 6: "Forgot password" Link

How do I make a payment?

To make a payment through Transact:

1. From the Overview page, select **Make a Payment**.
2. Check the item box(es) of the item(s) you want to pay for.
3. Click **Checkout** and follow the steps to complete the payment.

Figure 7: Selecting Items to Make a Payment

Why does my balance not match my statement?

The balance is provided and updated by the school. If the balance on the ePayment site does not match with what is owed, the student can contact the school's accounts office to have the balance corrected.

When will my financial aid reflect my account?

Please reach out to your university student services/affairs or bursar's office.