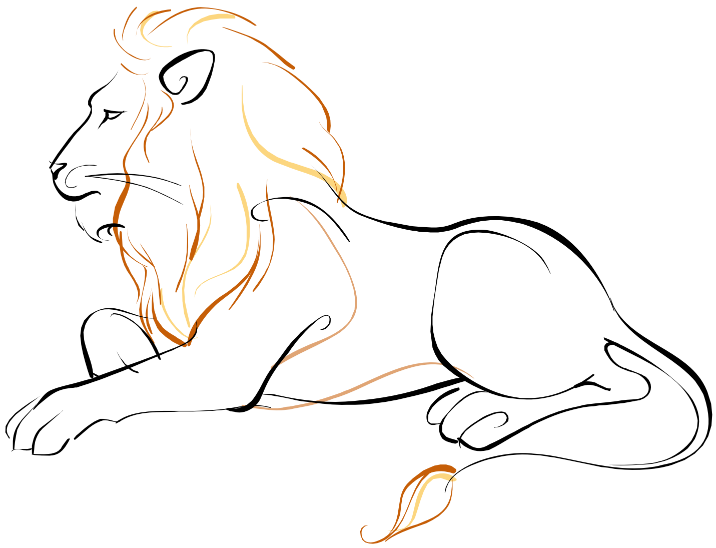
Loyola Marymount University Los Angeles

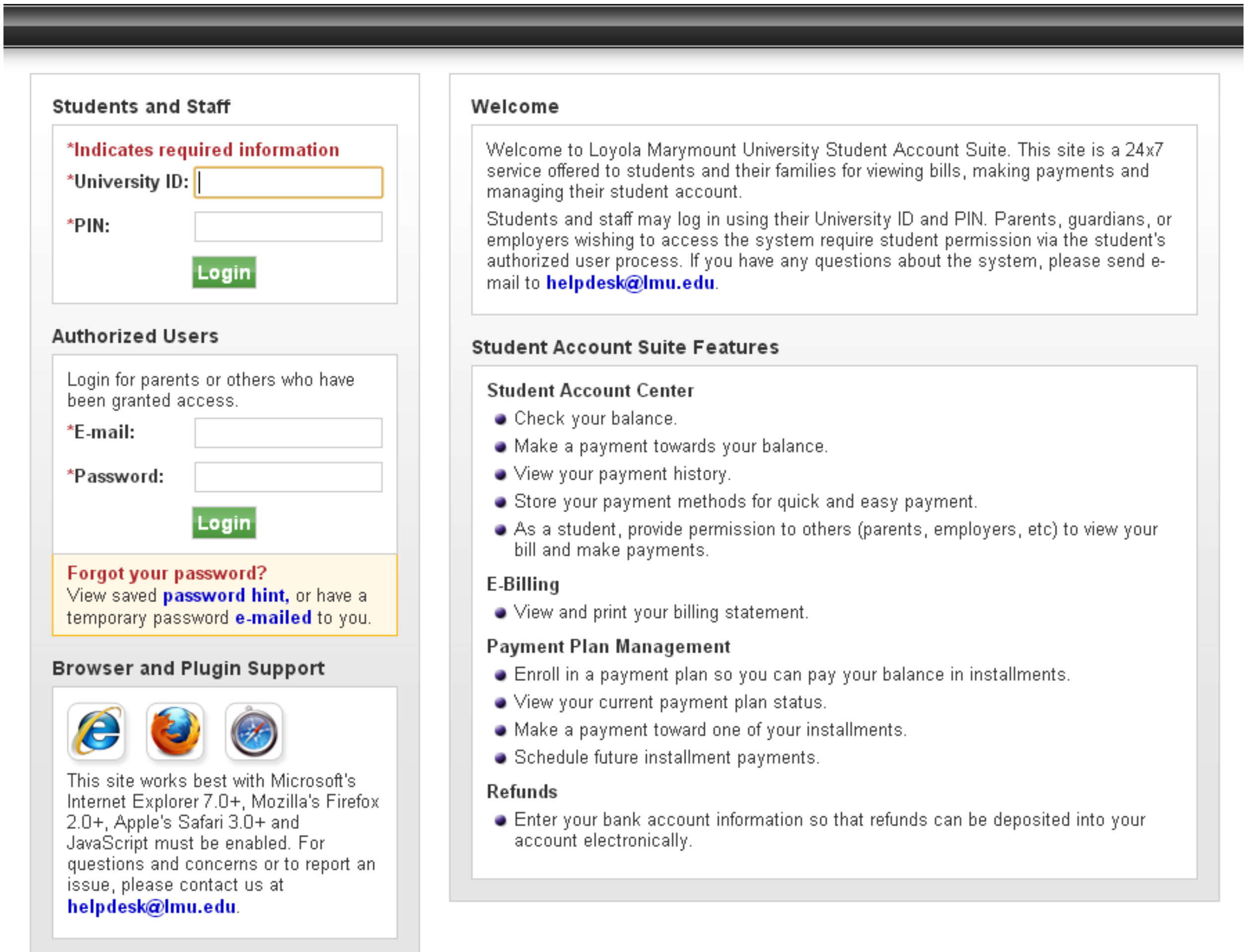
Student Account Center User Guide



Updated November 8, 2012

Student Login and Authorized User Login:

https://lmutpg.lmu.edu/C20995_tsa/web/login.jsp



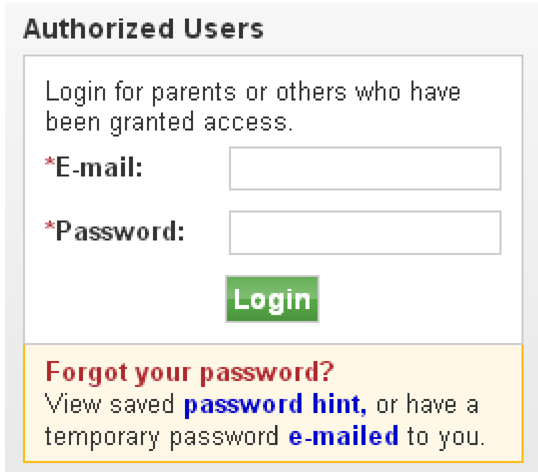
Student Login: Students log in at the top of the page, in the box labeled “Students and Staff.” Students log in credentials are their University ID and their Prowl PIN.

Authorized User Login: The first time authorized users log in, they use the email address and password from the login instructions that were emailed to them. Immediately after the first login, the authorized user creates a password to use for future logins.

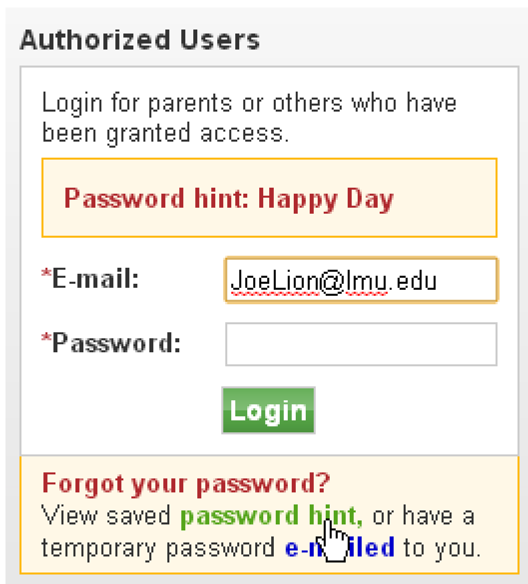
Note: If an authorized user changes the primary e-mail address in the user profile, the new e-mailed address must be used when logging in.

Authorized User Login – When Authorized User Forget Passwords

An authorized user who forgets his or her password must enter the login e-mail address, and then click on of the links below the Login Now button.

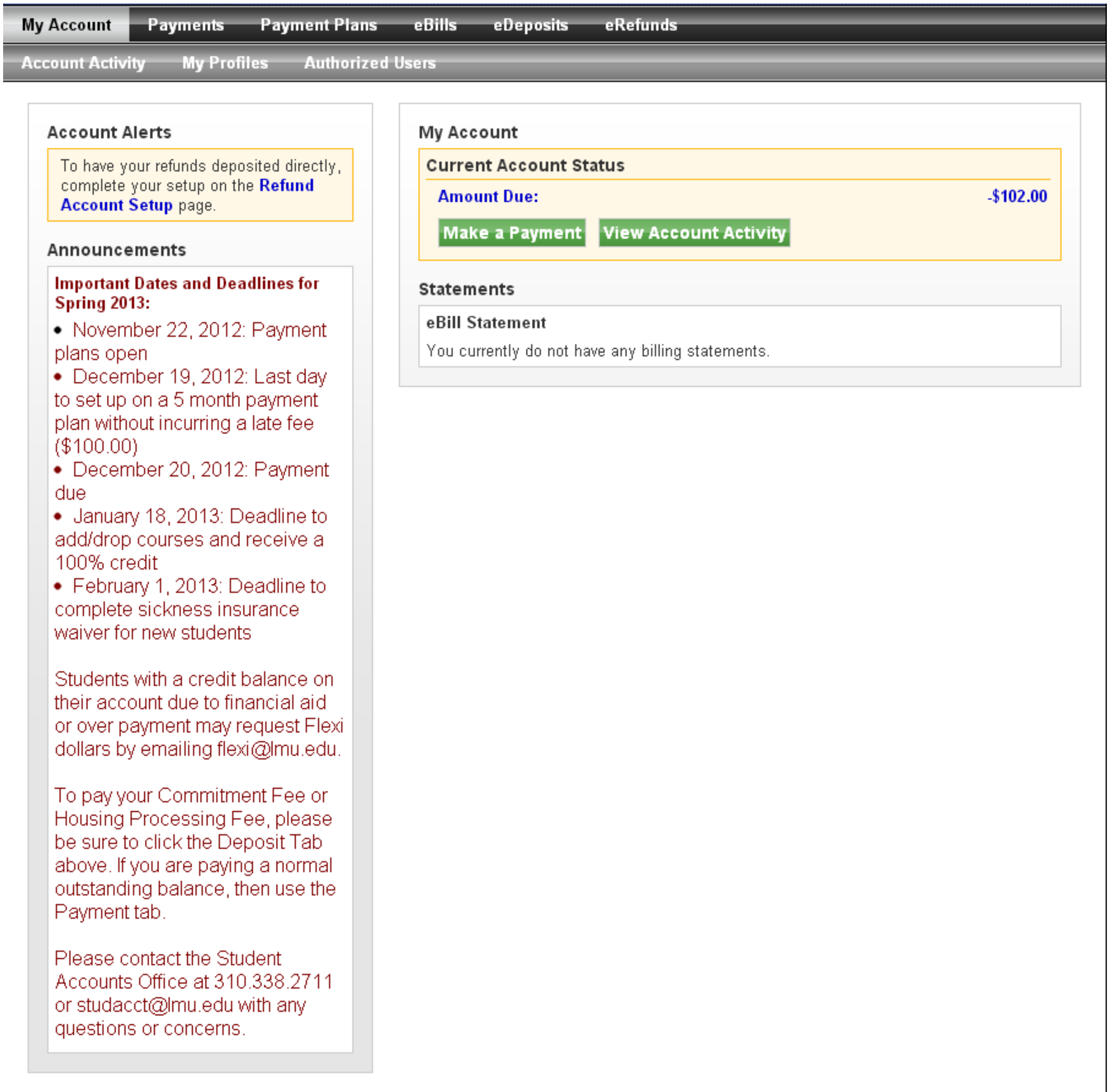


If the user clicks the password hint link, the password hint is displayed:



If the user clicks the “e-mailed” link, the password will be emailed to the address currently used for logging in.

The Home Page and Header Bar:

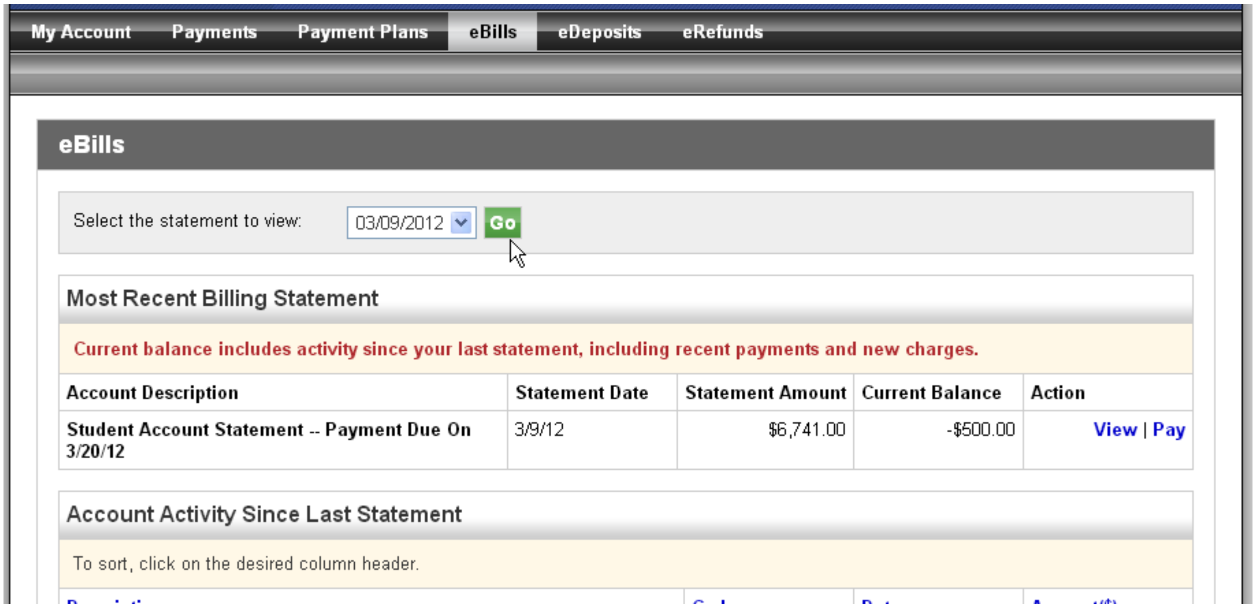


On the home page, students and authorized users see links and tabs for all of the features available to manage their student account.

Account Alerts: Account alerts are listed in the top left hand corner will let a student/authorized user know if there are any issues which may or may not require attention.

Annoucements: The annoucements section will give a student/authorized user information about upcoming deadlines regarding their student account along with other useful information.

eBills Tab:



Through the eBills tab, the student can view the latest statement, previous statements, and the current balance. The current balance includes activity since the last statement.

Authorized Users and the Statement:
The student must give the authorized user permission to view the statement. If the authorized user cannot see the statement, the student has not allowed them to do so. The student can change this status in the Authorized Users tab.

Viewing Recent Account Activity

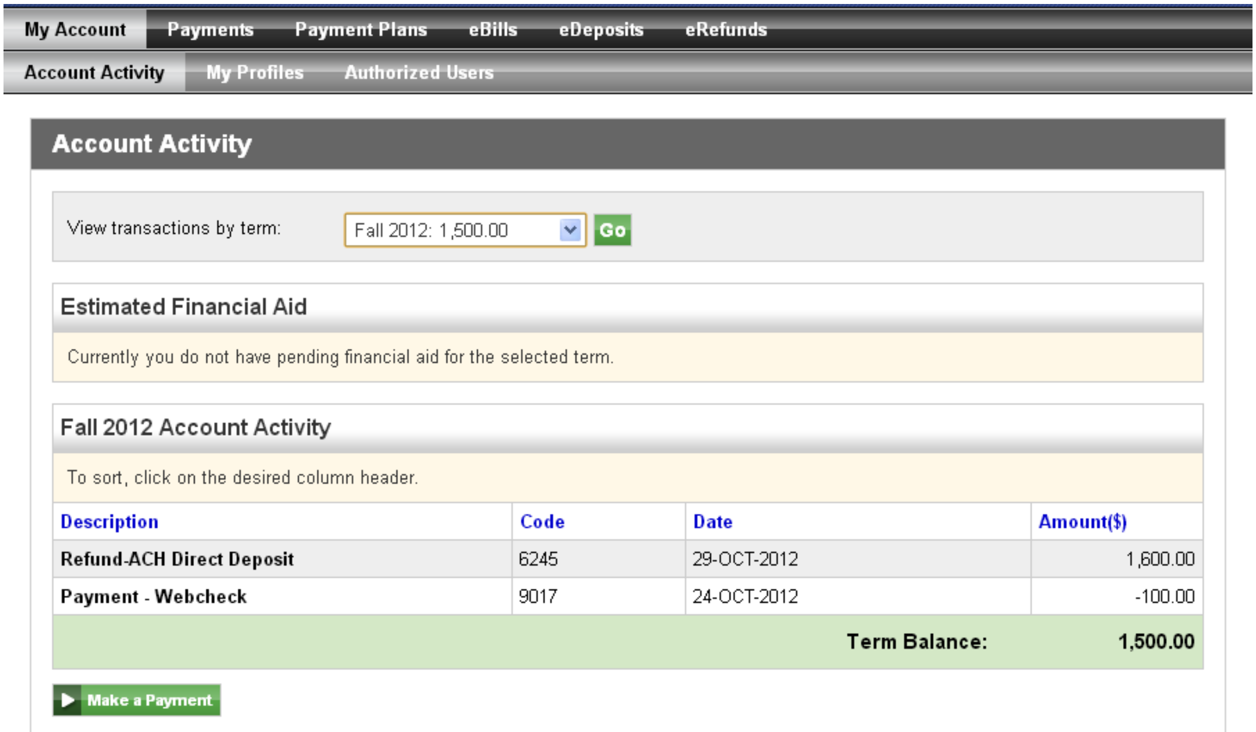
Account Activity Since Last Statement

To sort, click on the desired column header.

Description	Code	Date	Amount($)
Deposit Payment Webcheck	9309	05-NOV-2012	-500.00
Refund-ACH Direct Deposit	6245	29-OCT-2012	1,600.00
Deposit Payment Webcheck	9309	25-OCT-2012	-500.00
Payment - Webcheck	9017	24-OCT-2012	-100.00
Deposit Payment Webcheck	9309	24-OCT-2012	-500.00
Deposit Payment Webcheck	9309	24-OCT-2012	-500.00

View All Activity

The Account Activity section in the eBills tab shows activity since last statement by default. Current Activity includes all account activity from the day of the last statement on. To view all of the activity on the account click on “View All Activity.”



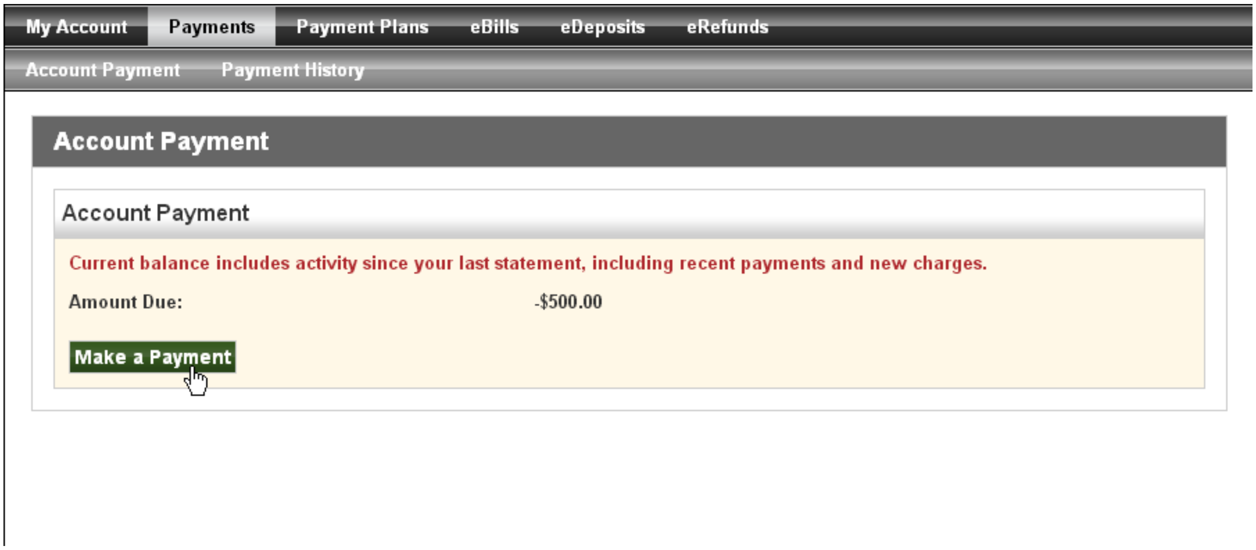
The student/authorized user who select a term will see all account activity for that term.

The “Make a Payment” button, which takes the user to the Payments tab, is not shown on this page if the student has a credit balance on their account for the selected term.

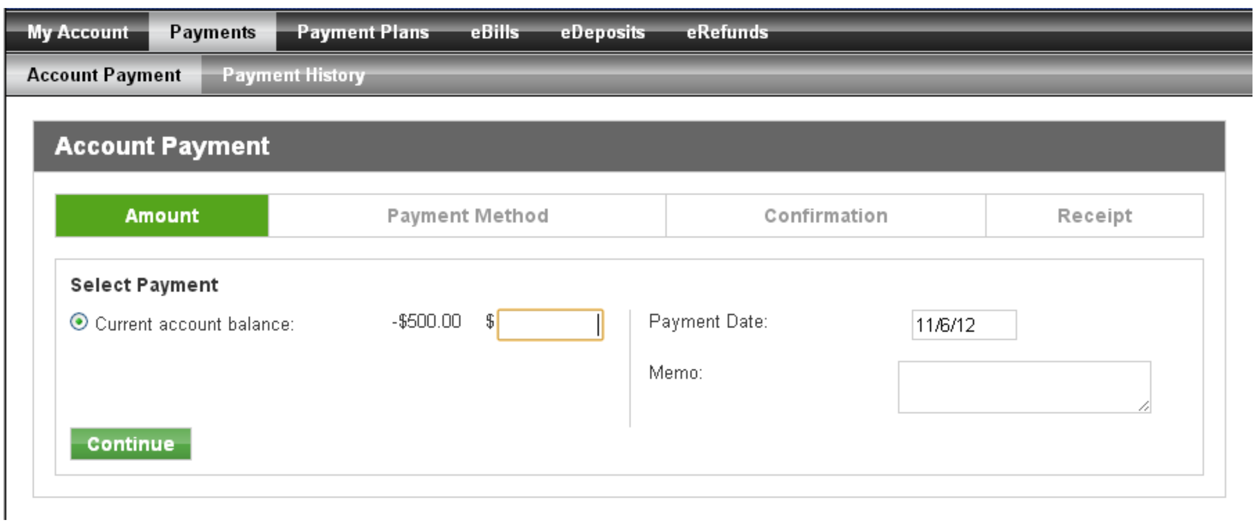
This page also displays estimated aid that has not yet been processed and paid to the student’s account, but is expected to come in as long as all the requirements for the aid are met.

Payments Tab:

Making a Payment



To make a payment click on the Payments tab and then click on "Make a Payment."



Payment Amount: Multiple options can be listed for a payment amount. It is up to the user to decide which options they would like to pay. Some items, such as the line item payments are set amounts to be paid and there is no option to select a partial amount of those particular items. Items which fall into this category include miscellaneous fees such as parking tickets, student health charges, etc.

Payment Date: On this date, the transfer from the user's personal account to be applied toward the amount due will be initiated and will take 3-5 business days to actually be deducted from the student's or authorized user's personal bank account.

Scheduled Payments: If the payment date is later than the current date, it will appear in the Pending Payments list on the Payments tab.

Pending Payments: Students and Authorized Users who have saved payment methods can schedule payments for future date. When payments (including plan installments) are scheduled for future dates, they appear in the Pending Payments list.

To schedule a payment a student/authorized user must change the date called "Payment Date" located on the right hand side of the payment information box.

Only the user who set up a payment can edit or delete it. To change the details of an upcoming payment, the user clicks its "Edit" link. To cancel a payment, the user clicks its Delete link.

Note: If a student deletes an authorized user, all of the authorized user's scheduled and automatic payments will be deleted.

Note: If an administrator removes one of the user's payment methods, all scheduled and automatic payments associated with that method will be deleted.

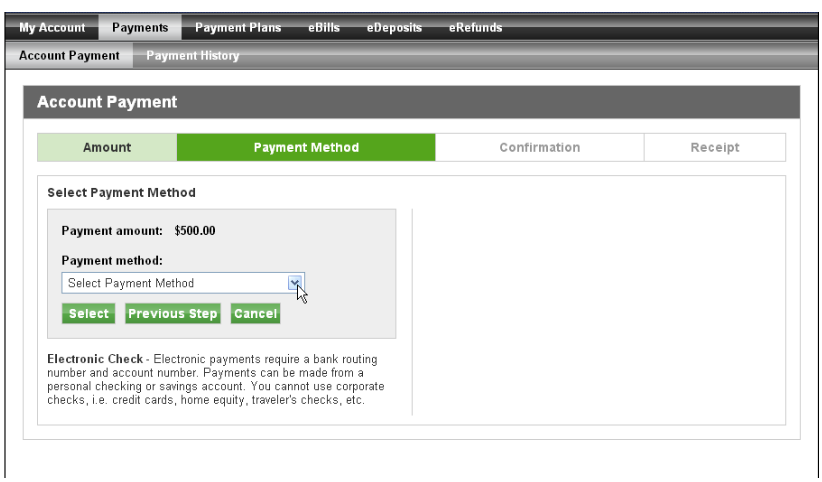
Plan Installments: If the student is enrolled in a plan, the plan installments list shows each installment and its due date. In this list, the student or authorized user can:

• Click an installment link to go to the payment plan's description page, which includes a link to pay off the plan.

• Click a Schedule/Pay link to schedule or pay a single installment.

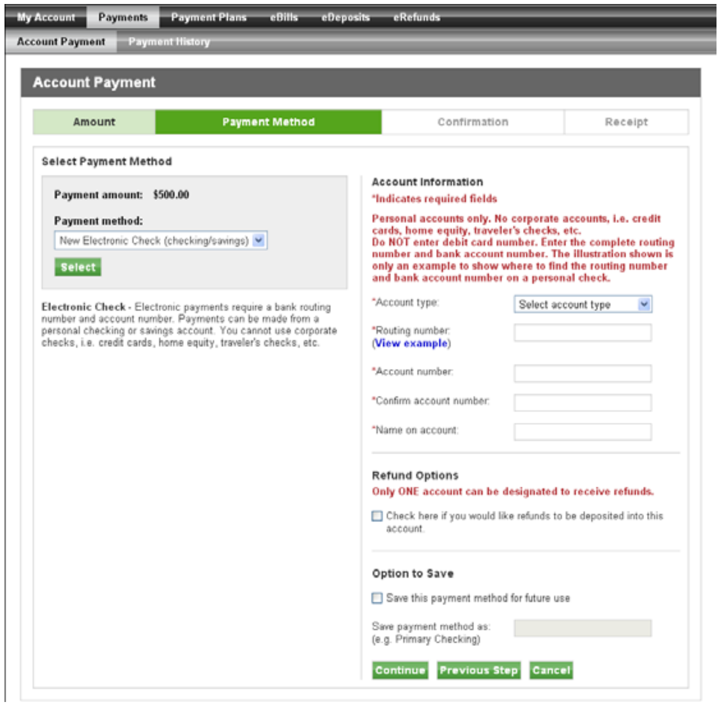
Note: If a plan requires its installments to be scheduled, its payment method, but no other payment details, can be edited later by the user. If scheduled payments were optional for the plan, they can be edited once they have been added to the Pending Payments list.

Making a Payment – Select a Payment Method



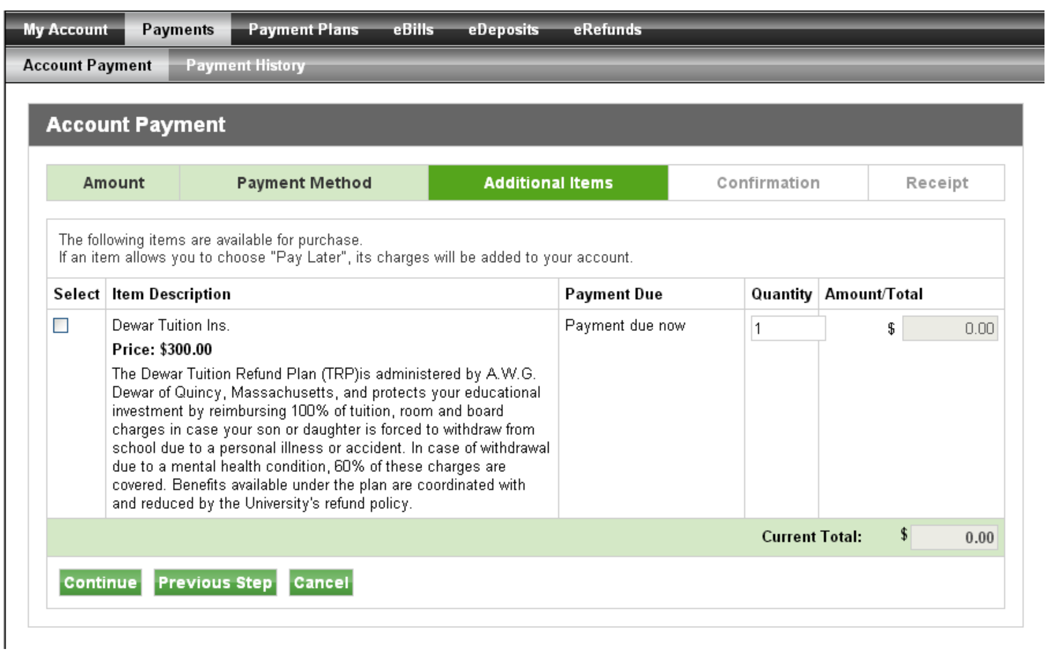
To make a payment, a user must select from the Payment method dropdown list. A user can either select a payment method they previously saved or select "New Electronic Check (checking/savings). Once a payment method has been selected, a user must click on the "Select" button to continue.

New Bank Account Setup



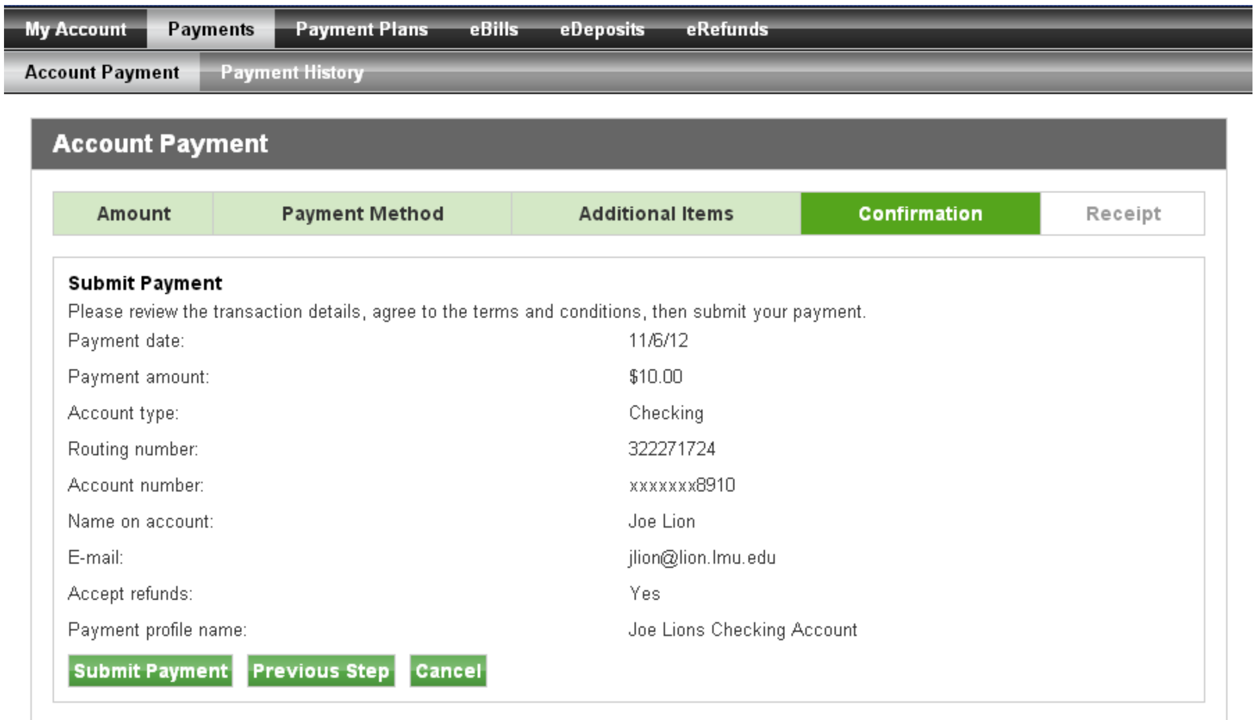
A user who selects "New Electronic Check (checking/savings)" payment methods enters information about the account. The account can be either a checking or a savings account.

Making a Payment – Additional Items



During certain times of the year, a student/authorized user has the ability to purchase additional items. The student/authorized user can elect to purchase the additional item by selecting it using the checkbox, or the user can hit continue to elect not to purchase that additional item.

Making a Payment – Confirmation



If the payment method had previously been saved a payment confirmation will appear verifying the details of the payment.

If the payment method is a new method an ACH agreement will appear with the payment confirmation.

Making a Payment – ACH Agreement

Account Payment

Amount	Payment Method	Additional Items	Confirmation	Receipt

Submit Payment

Please review the transaction details, agree to the terms and conditions, then submit your payment.

Payment date:	11/6/12
Payment amount:	$100.00
Account type:	Checking
Routing number:	322271724
Account number:	xxxxxx2485
Name on account:	Mrs. Lion
E-mail:	jlion@lion.lmu.edu
Accept refunds:	No
Payment profile name:	Mrs. Lion's Checking Acct

Terms and Conditions

I hereby authorize **Loyola Marymount University** to initiate debit or credit entries to my Depository according to the terms below,and for my Depository to debit or credit the same to such account. In the event that this electronic payment is returned unpaid for "NSF" or "Insufficient Funds", I understand that a **$25.00** return fee will be electronically debited from my account.

Name: **Mrs. Lion**

Address:

Depository:

CITIBANK FSB
ONE PENN'S WAY
NEW CASTLE,DE 19720

Routing Number: 322271724

Account Number: xxxxxx2485

Debit Amount: $100.00

This agreement is dated Tuesday, November 6, 2012.

For fraud detection purposes, your internet address has been logged: 157.242.194.188 at 11/6/12 4:28:36 PM CST

Any false information entered hereon constitutes as fraud and subjects the party entering same to felony prosecution under both federal and state laws of the United States. Violators will be prosecuted to the fullest extent of the law.

To revoke this authorization agreement you must contact: **helpdesk@lmu.edu**

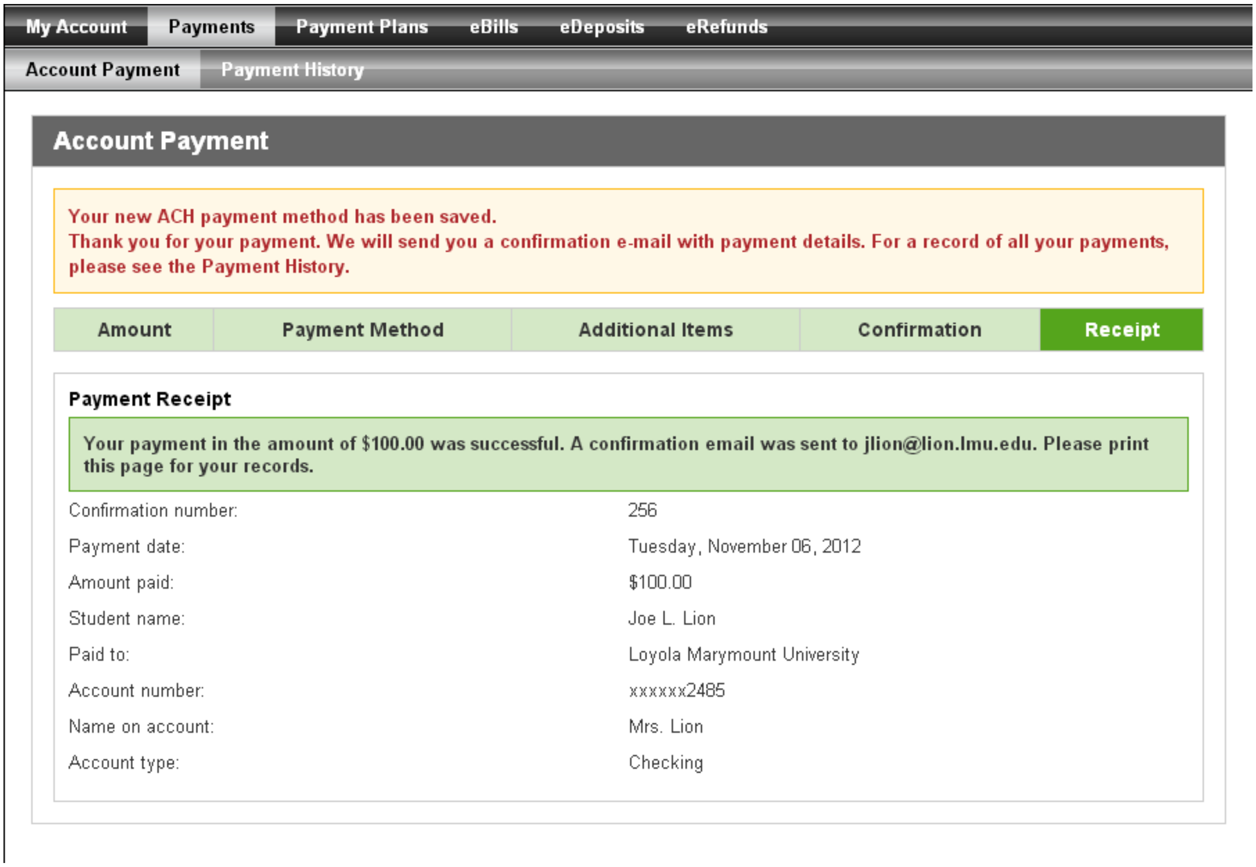
☐ I agree to the above terms and conditions. **(Print Agreement)**

Submit Payment | Previous Step | Cancel

Users must complete an ACH agreement to:

- Make a payment from a bank account
- Save a bank account as a payment method
- Use a bank account with a payment plan
- Use a bank account to pay deposits

The Payment Receipt



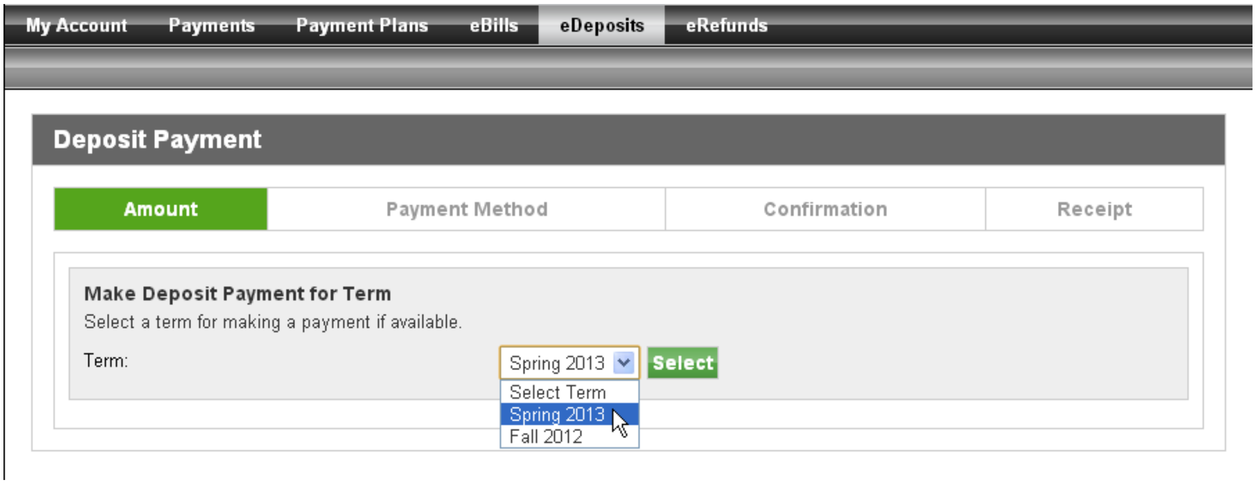
The payment receipt is the most detailed record of an individual payment and should be retained by the user. The student or authorized user should print it for their records.

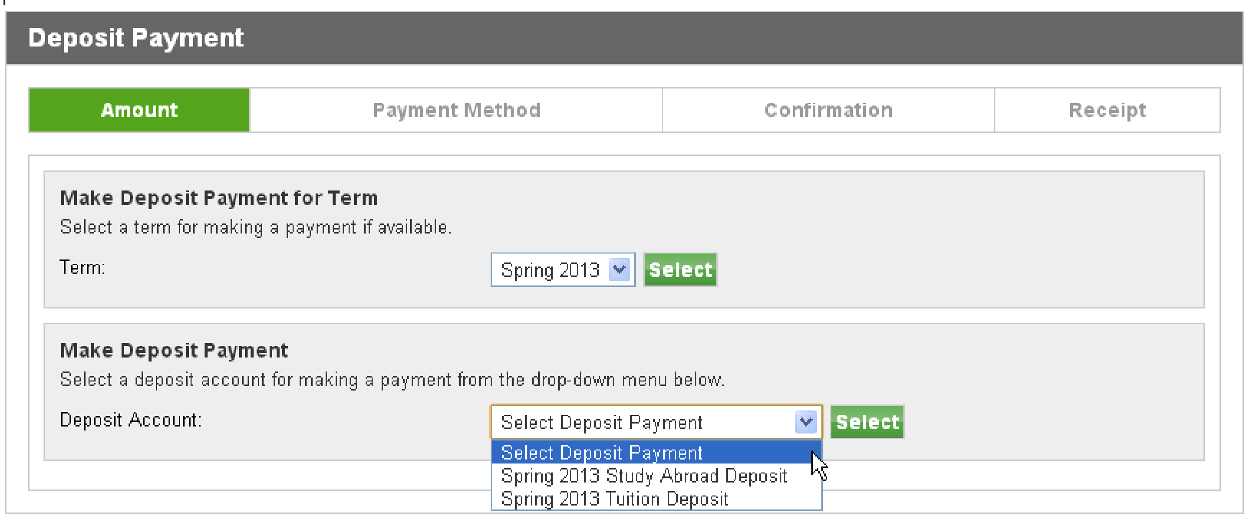
If the user does not save his or her receipt and needs to see a record of payments, the user should go to the Payment History tab. The Payment History tab shows:

- Who made the payment
- Date and time of payment
- Amount
- Memo
- Reference number

eDeposits Tab:

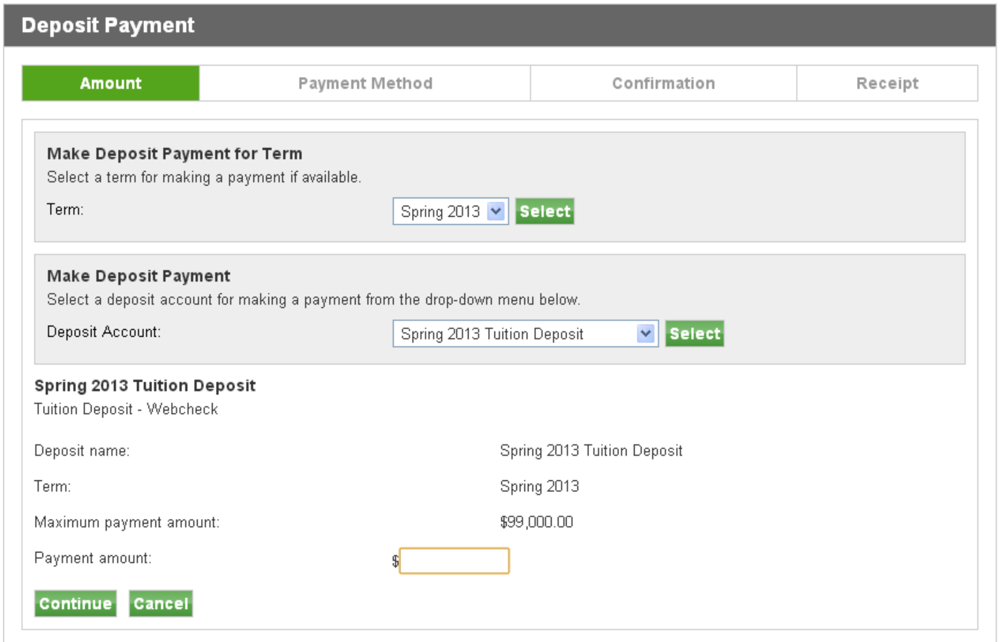
Making a Deposit – Selecting the Deposit



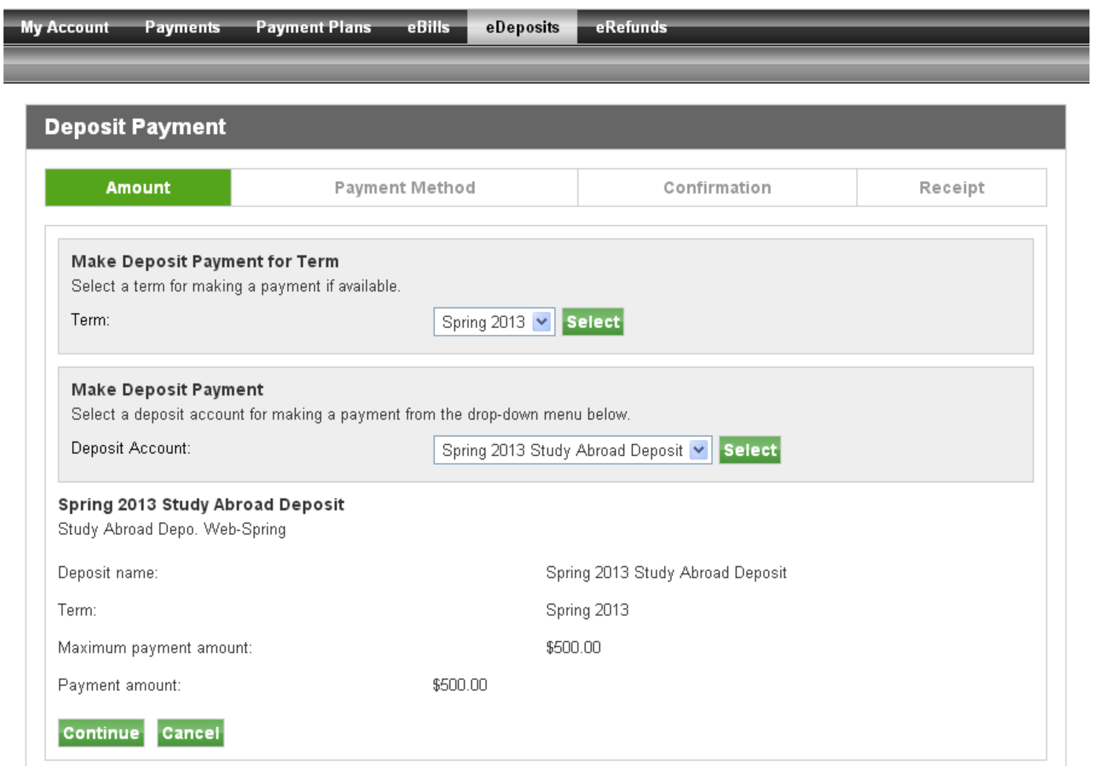


The student/authorized user selects a term, and then selects a deposit to pay for that term. The next screen allows the user to make the payment.

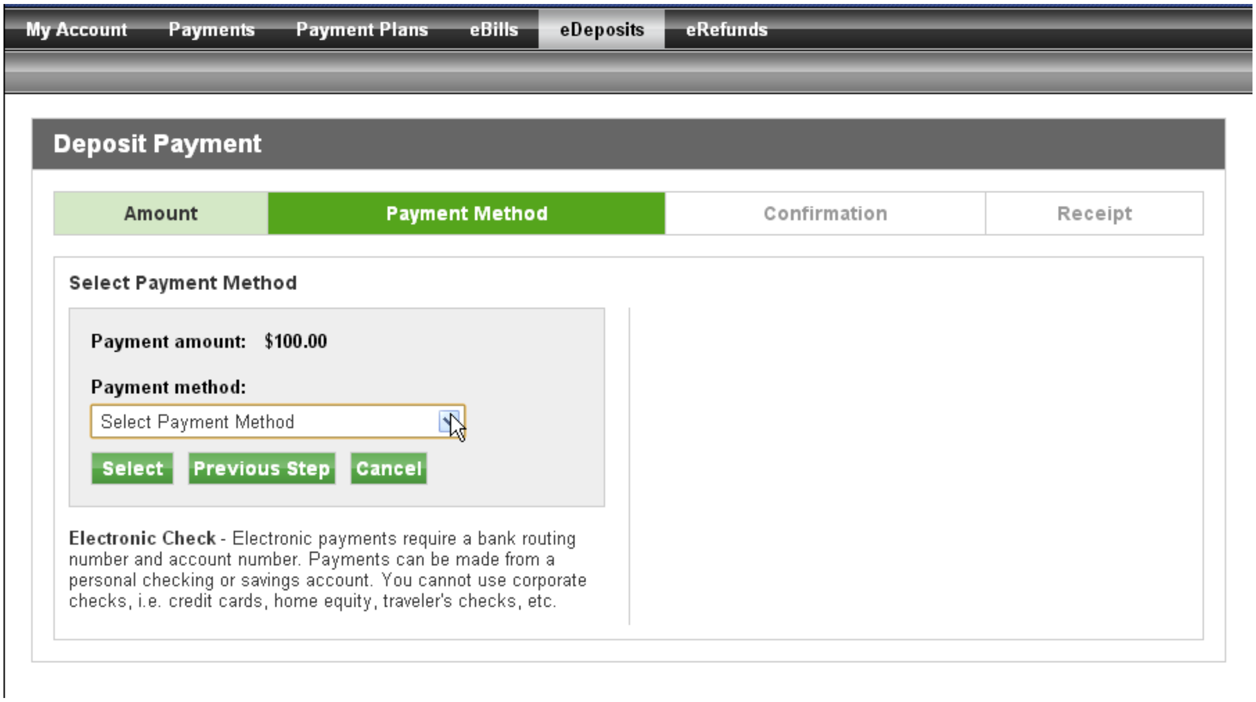
Making a Deposit – Entering an Amount



Depending on which deposit you chose there will either be a maximum amount allowed (as above) to be paid or there will be a set amount for the deposit (as below).



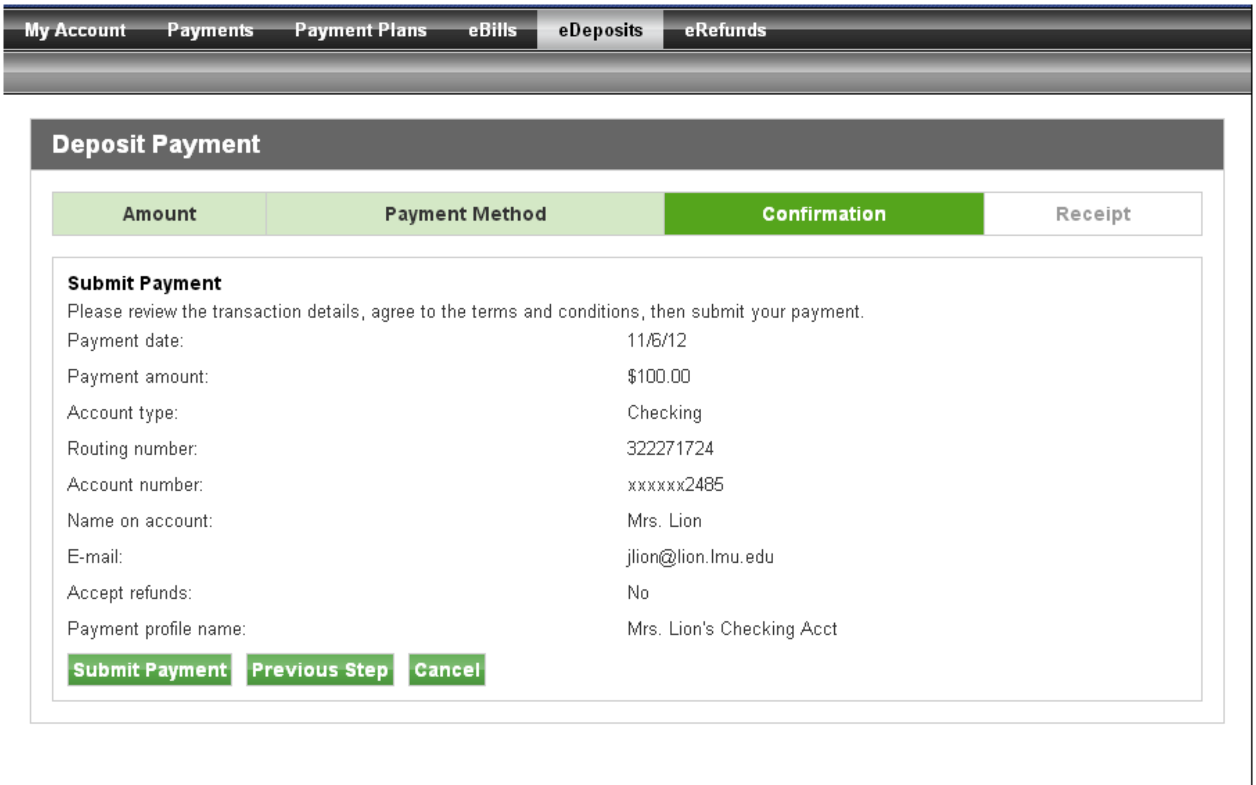
Making a Deposit – Selecting a Payment Method



The student or authorized user selects a bank account method. If the user has a saved payment method details in the payment profile, then those saved methods are also available.

Note: A user who selects a new electronic check (checking/savings) payment method will proceed through payment method setup (page 9) before confirming the payment.

Making a Deposit – Confirming the Payment



After a saved payment method is selected (or new payment method details are entered), the user reviews payment details and submits the payment.

A payment receipt is generated.

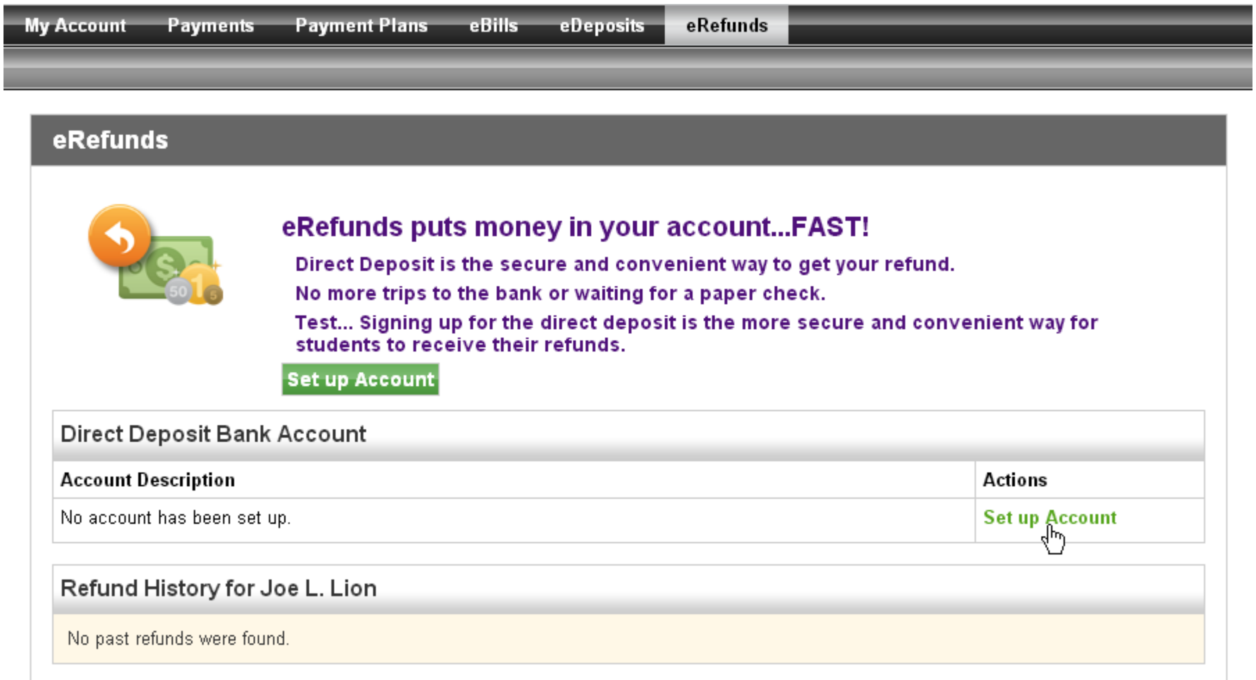
The payment receipt is the most detailed record of an individual payment and should be retained by the user. The student or authorized user should print it for their records.

If the user does not save his or her receipt and needs to see a record of payments, the user should go to the Payment History tab. The Payment History tab shows:

- Who made the payment
- Date and time of payment
- Amount
- Memo
- Reference number

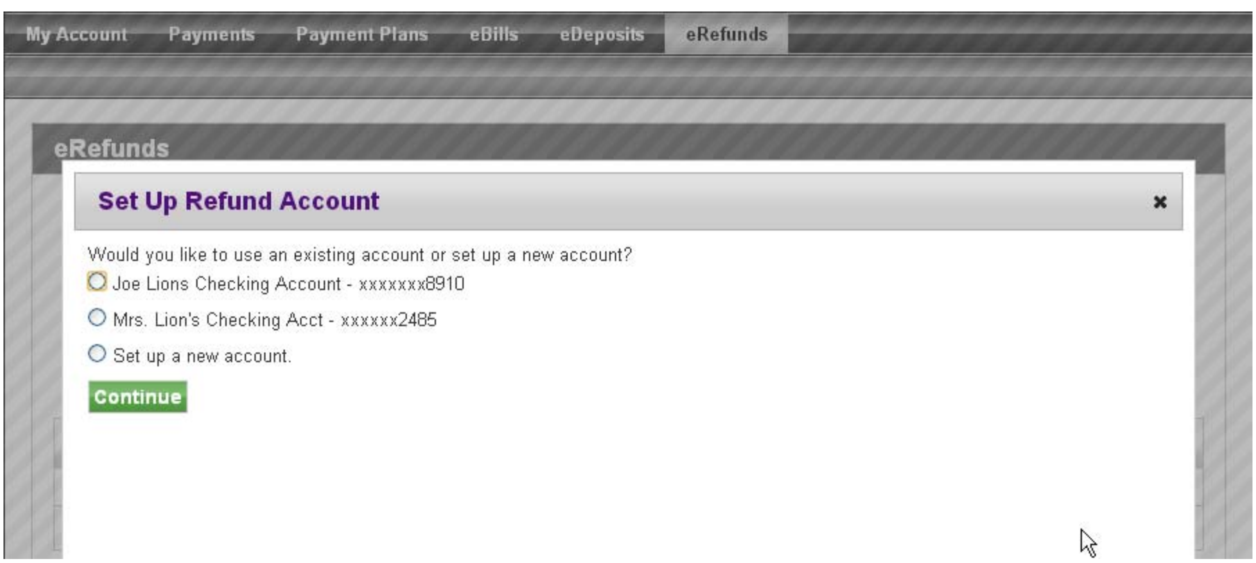
eRefunds Tab:

Refund Account Setup



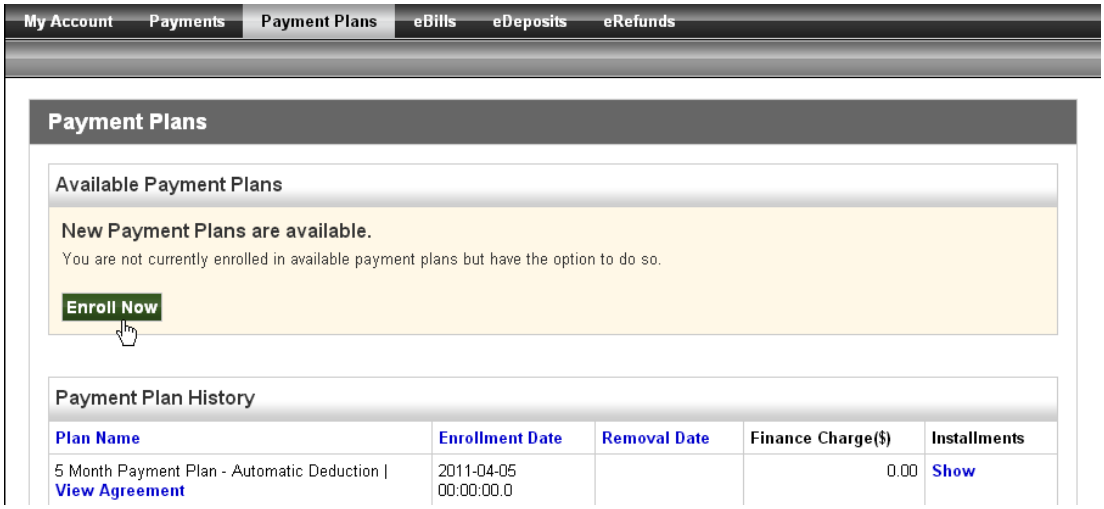
The refund account is the bank account where refunds from LMU are deposited. Only students can set up refund accounts; authorized users cannot set them up.

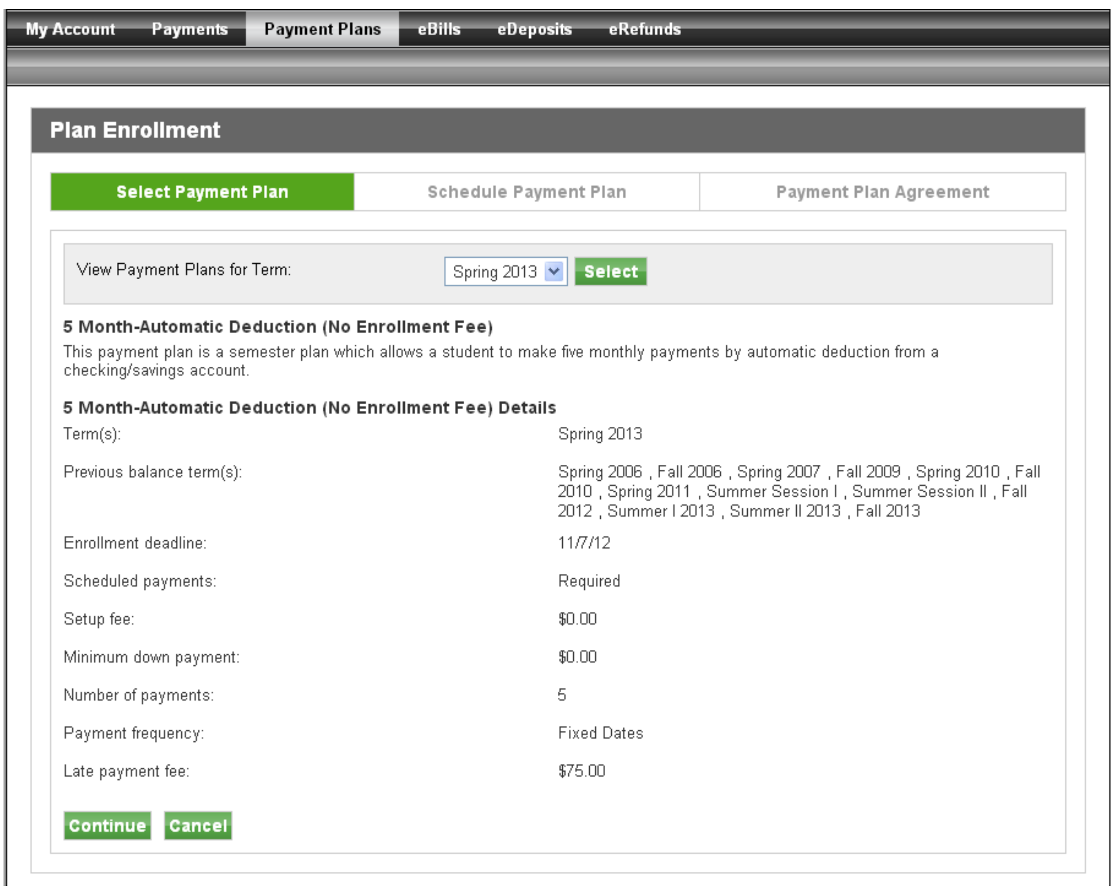
To set up an account for direct deposit a student can click on the "Set up Account" link and either select an already saved payment method or enter in a new payment method.



Payment Plans Tab:

Enrolling In a Payment Plan





On the Payment Plans tab, a student/authorized users see the details of any payment plan currently used for the student's account. Only one enrolled plan is allowed per student account, per term.

Switching Plans: Users may be able to switch plans depending on plan availability and their current enrollment. If eligible for a different available plan, the enrolled user can switch plans. If a student has enrolled in a plan, the authorized user can switch plan enrollment; in this case, the authorized user is then enrolled in the new plan. If an authorized user is enrolled in a plan, the student cannot switch to a new plan. To switch plans, the user clicks the "Sign Up for a New Payment Plan" link and reviews available plans. When the user signs up for the new plan, the system removes the user from the previous plan and enroll them onto the new plan.

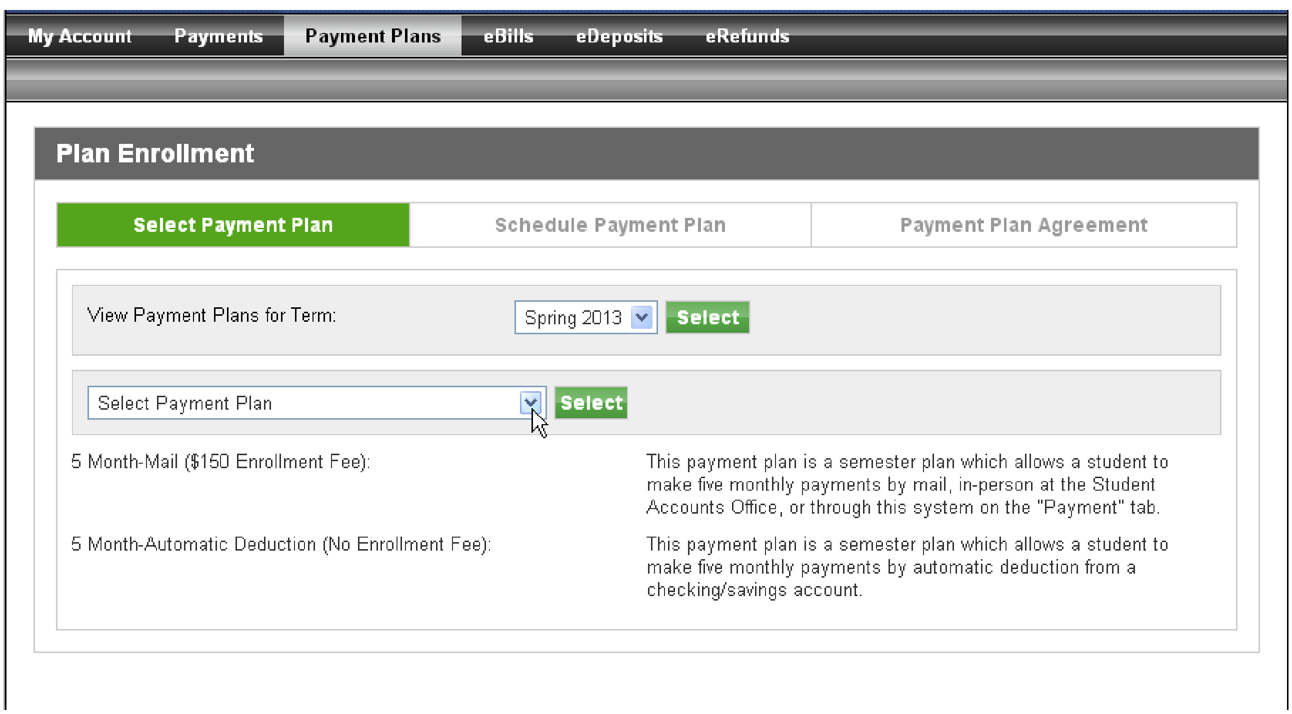
On the payment plans tab, a user can:

- Sign up for a new plan, if not currently enrolled
- Change the payment method for any scheduled payments on the plan
- Pay off the remaining plan amount
- View completed plans

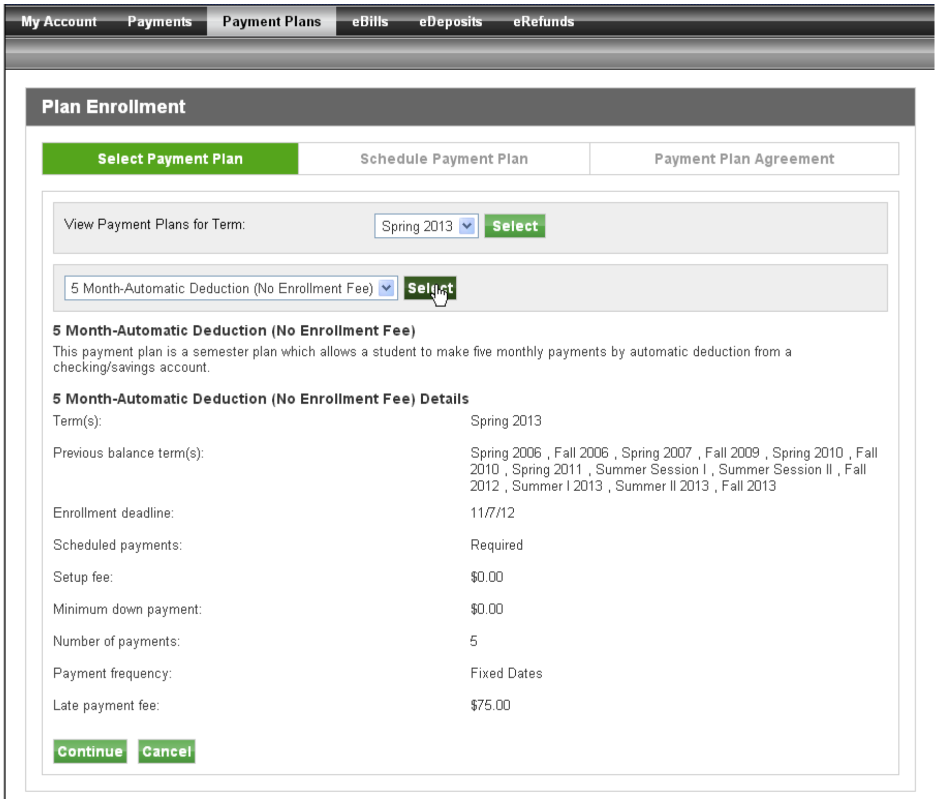
Note: To pay a single installment, the user must go to the Payments tab.

Changes in Plan Amounts: Students will see changed amounts on plans as a result of recalculation. Plan recalculation spreads new eligible charges and credits across the plan.

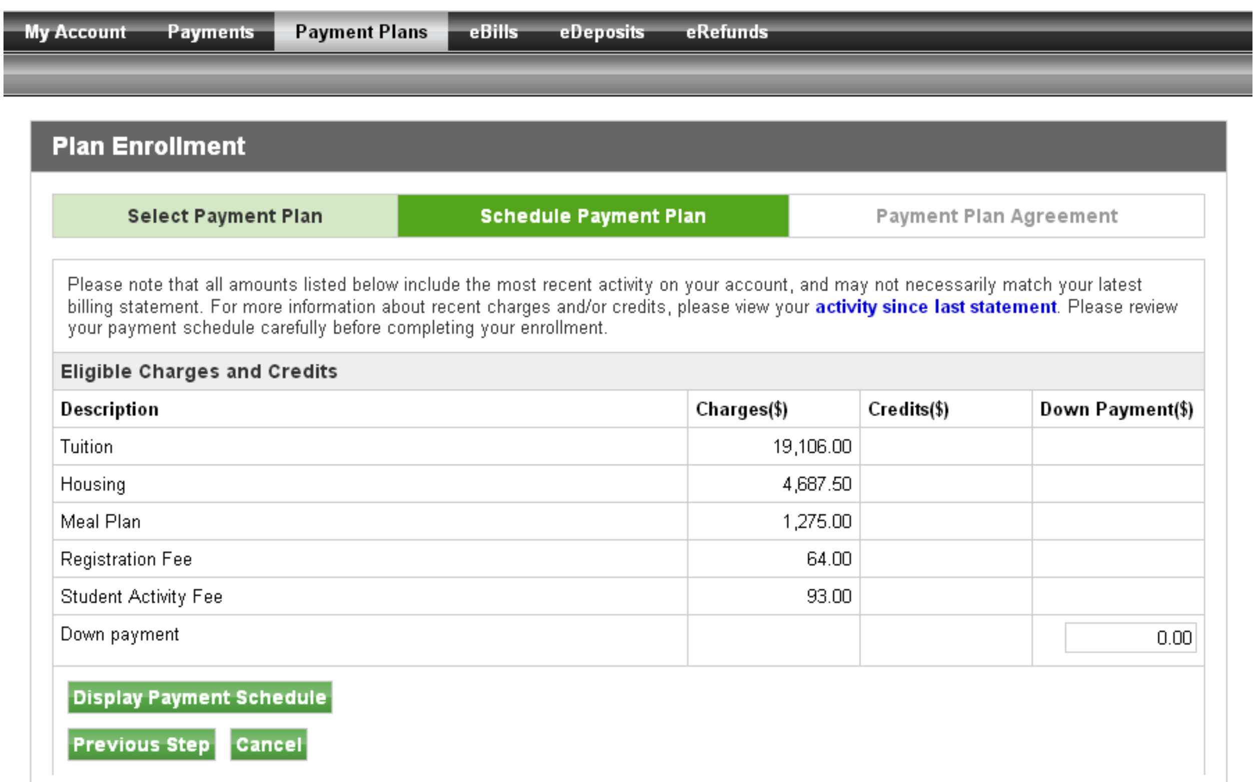
Plan Enrollment – Selecting a Plan



The user first selects a term, then all available payment plans are listed for that term and based on the descriptions the user can select a payment plan from the drop down to view the plan details.



Plan Enrollment – The Budget Worksheet



This worksheet should be reviewed very carefully as it contains a plethora of important information for the user.

Most plans are set up to reflect actual charges on a student's account; the budget worksheet shows the amounts due and allows the user to enter a down payment.

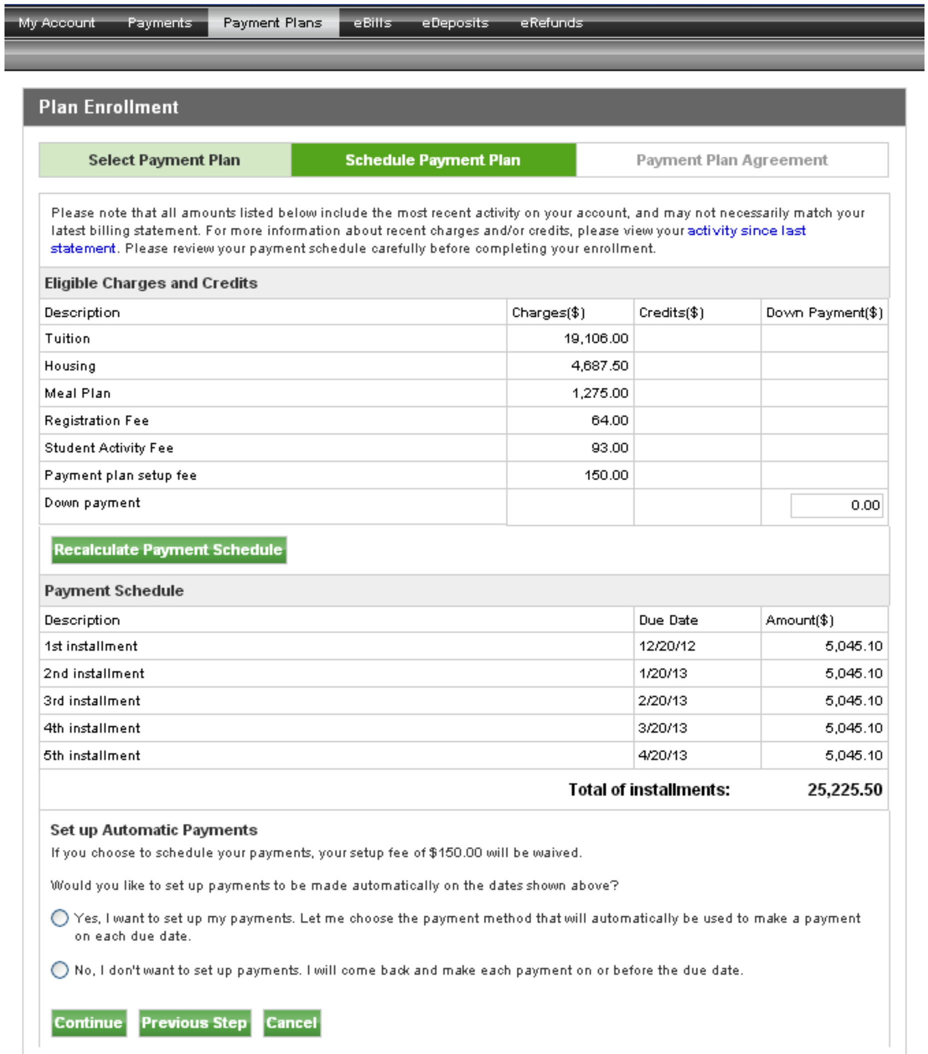
After the down payment is entered, the user clicks the Display Payment Schedule button to see a list of plan installments. Users to do not have to make a down payment towards the plan. Additionally, payment for the down payment is requested at the time the plan is set up.

Charges on the Plan: Only the eligible charges including tuition, housing, meals plans and those mandatory fees that are most common to all students are included in the payment plan. Students may have other charges that were not included in the payment plan that they will need to pay as they are accrued.

Minimum Amounts: A minimum of $200.00 is required to be outstanding after aid to be included in any payment plan.

There are plans in which actual charges are not used to setup a payment plan. The only plan that uses estimated charges and credits are for those Undergraduate full-time students who would like to pay in full for the entire year. In this case the student would estimate their charges and financial aid based on the tuition and fees rates listed on the student account website at www.lmu.edu/studentaccounts.

Plan Enrollment – The Payment Schedule



My Account | Payments | Payment Plans | eBills | eDeposits | eRefunds

Plan Enrollment

Select Payment Plan | Schedule Payment Plan | Payment Plan Agreement

Please note that all amounts listed below include the most recent activity on your account, and may not necessarily match your latest billing statement. For more information about recent charges and/or credits, please view your activity since last statement. Please review your payment schedule carefully before completing your enrollment.

Eligible Charges and Credits

Description	Charges($)	Credits($)	Down Payment($)
Tuition	19,106.00		
Housing	4,687.50		
Meal Plan	1,275.00		
Registration Fee	64.00		
Student Activity Fee	93.00		
Payment plan setup fee	150.00		
Down payment			0.00

Recalculate Payment Schedule

Payment Schedule

Description	Due Date	Amount($)
1st installment	12/20/12	5,045.10
2nd installment	1/20/13	5,045.10
3rd installment	2/20/13	5,045.10
4th installment	3/20/13	5,045.10
5th installment	4/20/13	5,045.10
	Total of installments:	**25,225.50**

Set up Automatic Payments

If you choose to schedule your payments, your setup fee of $150.00 will be waived.

Would you like to set up payments to be made automatically on the dates shown above?

- Yes, I want to set up my payments. Let me choose the payment method that will automatically be used to make a payment on each due date.
- No, I don't want to set up payments. I will come back and make each payment on or before the due date.

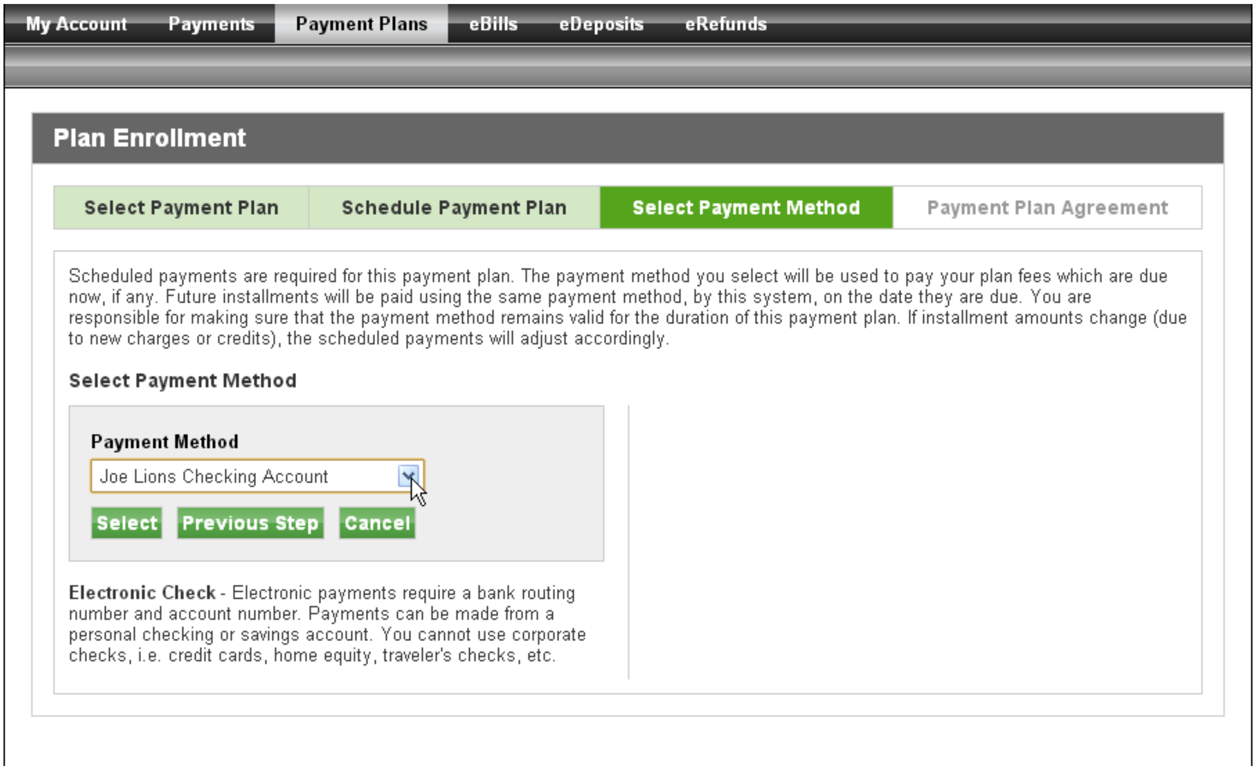
Continue | Previous Step | Cancel

After the student or authorized user enters amounts in the Budget Worksheet and clicks Display Payment Schedule, the Payment Schedule appears.

Ability to Change Amounts: Here, the user can see the due dates and amounts of each plan installment. The user can change the down payment amount. If the plan lets the user estimate amounts for each item, then the user can change those amounts as well, up to the maximum amount allowed. The user clicks “Recalculate Payment Schedule” button to see how the new amounts change the plan installments.

Options to Schedule Payments: If the plan requires scheduled payments, then the “Set up Automatic Payments” at the bottom of the screen do not appear. The user can edit the payment method for the installments later. If the plan doesn’t require scheduled payments, then the user can choose to schedule installments now or pay them individually later. If the user chooses to schedule payments when they are not required, then the payment plan fee may be waived and the installments are scheduled for the dates and amounts shown. However, the user can edit the payment method, date, and amount of any scheduled payment.

Plan Enrollment – Selecting the Payment Method

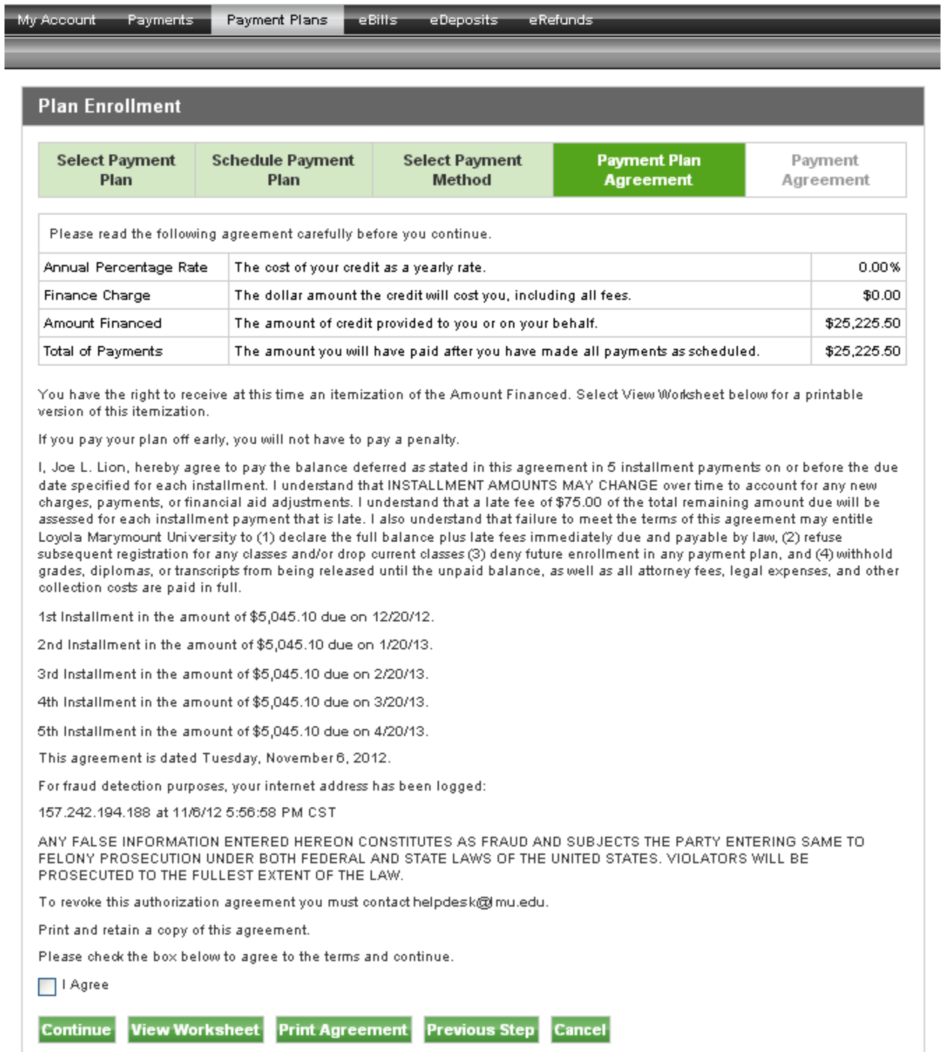


After the student or authorized user view the payment schedule, the next step is to select a payment method for the plan if installments will be scheduled.

The user can select an existing payment method from the payment profile, if you allow saved payment methods, or add a new payment method to the profile.

Note: If a down payment is selected it will be due imdidately and will be taken from the designated bank account that same day.

Plan Enrollment – Signing the Agreement



My Account | Payments | Payment Plans | eBills | eDeposits | eRefunds

Plan Enrollment

Select Payment Plan | Schedule Payment Plan | Select Payment Method | Payment Plan Agreement | Payment Agreement

Please read the following agreement carefully before you continue.

Annual Percentage Rate	The cost of your credit as a yearly rate.	0.00%
Finance Charge	The dollar amount the credit will cost you, including all fees.	$0.00
Amount Financed	The amount of credit provided to you or on your behalf.	$25,225.50
Total of Payments	The amount you will have paid after you have made all payments as scheduled.	$25,225.50

You have the right to receive at this time an itemization of the Amount Financed. Select View Worksheet below for a printable version of this itemization.

If you pay your plan off early, you will not have to pay a penalty.

I, Joe L. Lion, hereby agree to pay the balance deferred as stated in this agreement in 5 installment payments on or before the due date specified for each installment. I understand that INSTALLMENT AMOUNTS MAY CHANGE over time to account for any new charges, payments, or financial aid adjustments. I understand that a late fee of $75.00 of the total remaining amount due will be assessed for each installment payment that is late. I also understand that failure to meet the terms of this agreement may entitle Loyola Marymount University to (1) declare the full balance plus late fees immediately due and payable by law, (2) refuse subsequent registration for any classes and/or drop current classes (3) deny future enrollment in any payment plan, and (4) withhold grades, diplomas, or transcripts from being released until the unpaid balance, as well as all attorney fees, legal expenses, and other collection costs are paid in full.

1st Installment in the amount of $5,045.10 due on 12/20/12.

2nd Installment in the amount of $5,045.10 due on 1/20/13.

3rd Installment in the amount of $5,045.10 due on 2/20/13.

4th Installment in the amount of $5,045.10 due on 3/20/13.

5th Installment in the amount of $5,045.10 due on 4/20/13.

This agreement is dated Tuesday, November 6, 2012.

For fraud detection purposes, your internet address has been logged:

157.242.194.188 at 11/6/12 5:56:58 PM CST

ANY FALSE INFORMATION ENTERED HEREON CONSTITUTES AS FRAUD AND SUBJECTS THE PARTY ENTERING SAME TO FELONY PROSECUTION UNDER BOTH FEDERAL AND STATE LAWS OF THE UNITED STATES. VIOLATORS WILL BE PROSECUTED TO THE FULLEST EXTENT OF THE LAW.

To revoke this authorization agreement you must contact helpdesk@lmu.edu.

Print and retain a copy of this agreement.

Please check the box below to agree to the terms and continue.

☐ I Agree

Continue | View Worksheet | Print Agreement | Previous Step | Cancel

To agree to the plan enrollment, the student or authorized user checks the "I Agree" box and clicks the "Continue" button. The payment plan enrollment will not be complete until the user checks the agree box and hits continue.

Ability to Make or Edit Payments: Only the user who sets up the scheduled payments (or a plan with required scheduled payments) can edit those payments. Also, while an authorized user can pay off any plan, a student cannot pay toward a plan set up by an authorized user.

Listed Installments that Are Not Yet Scheduled: The user must pay the installments individually. They will not be paid automatically as a result of plan enrollment unless the plan required scheduled payments.

Scheduled Installments (If Installments Were Optional during Enrollment): Scheduled installments will be made automatically on their scheduled dates.

To edit the payment, the user clicks the Edit link. The user can edit the payment to change the payment the payment date, payment method, and memo. However, the user cannot change the payment amount.

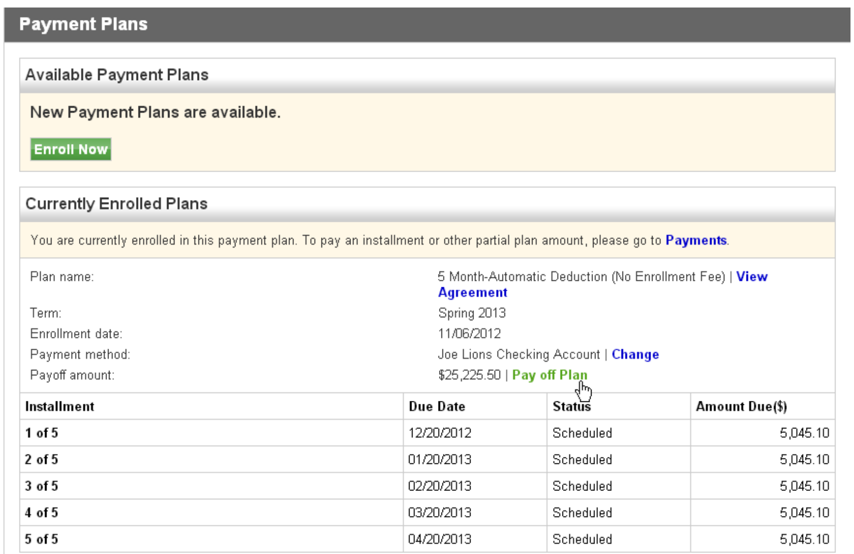
If the User clicks the Delete link, the installment will appear in a Payment Plan Installments list. The user must then reschedule or pay the installment.

The installment name links take the user to the Payment Plans tab. There, the plan can be paid in full or the payment method can be changed for the plan.

Scheduled Installments (If Installments Were Required At Enrollment): Scheduled installments will be made automatically on their scheduled dates.

The user cannot edit the date or amount of the payment. However, the user can click an individual installment to go to the Payment Plans tab. There, the plan can be paid in full or the payment method can be changed for the plan.

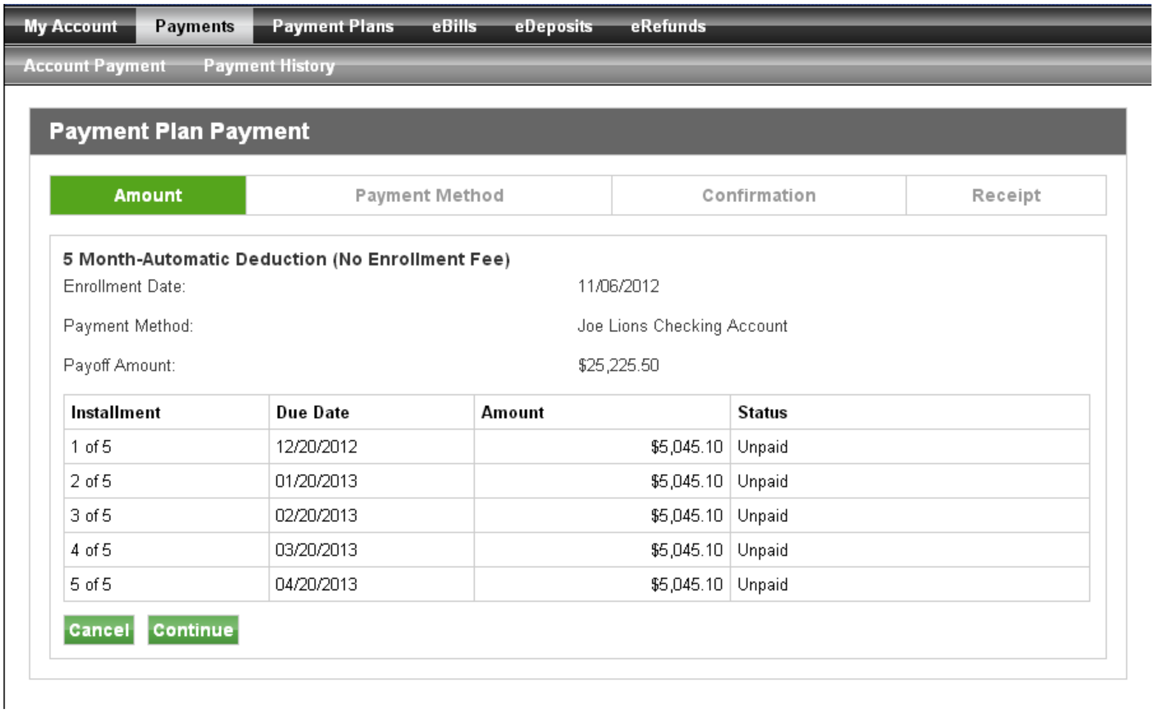
Paying Off a Plan



To pay off the remaining amount on a plan, the student or authorized goes to the Payment Plans tab. The user clicks the Pay Off Plan link to start the payment process.

To change the payment method used to pay toward the plan, the student clicks the change link in the Payment Method row.

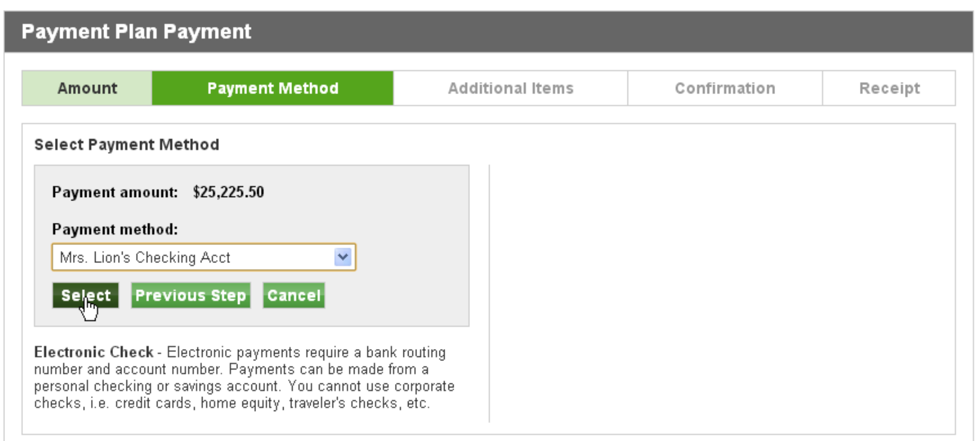
Paying Off a Plan – Selecting a Payment Method

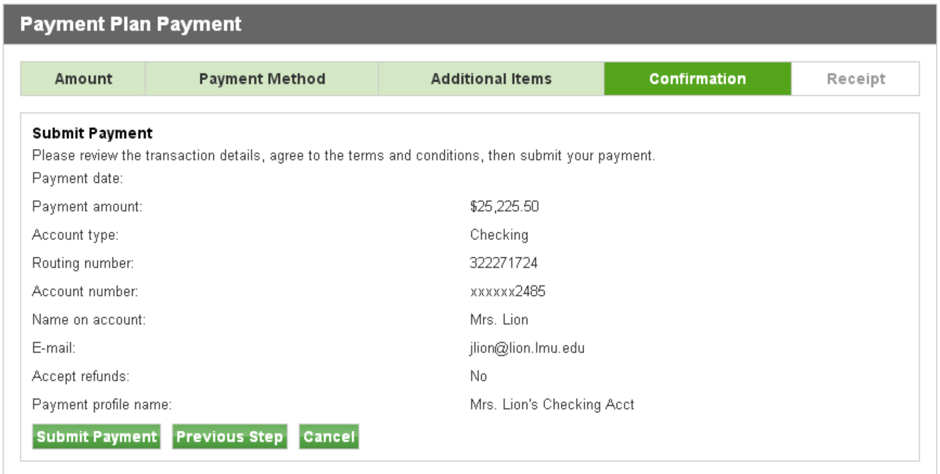


Installment	Due Date	Amount	Status
1 of 5	12/20/2012	$5,045.10	Unpaid
2 of 5	01/20/2013	$5,045.10	Unpaid
3 of 5	02/20/2013	$5,045.10	Unpaid
4 of 5	03/20/2013	$5,045.10	Unpaid
5 of 5	04/20/2013	$5,045.10	Unpaid

The student or authorized user selected a payment method at plan enrollment time. The user who wants to pay off the plan can choose a different payment method or can add a new method to the payment profile.

Paying off a Plan – Reviewing Payment Details





After selecting a payment method to pay off the plan, the student or authorized user reviews the payment to be made, then clicks the Submit button to process the payment and display a receipt.

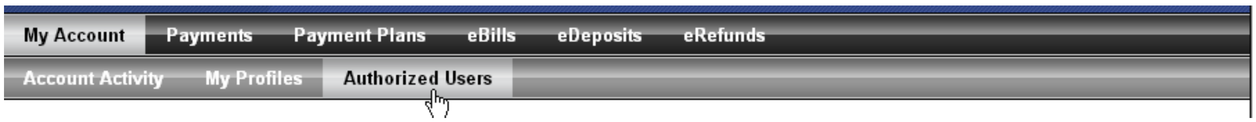
The payment receipt is the most detailed record of an individual payment and should be retained by the user. The student or authorized user should print it for their records.

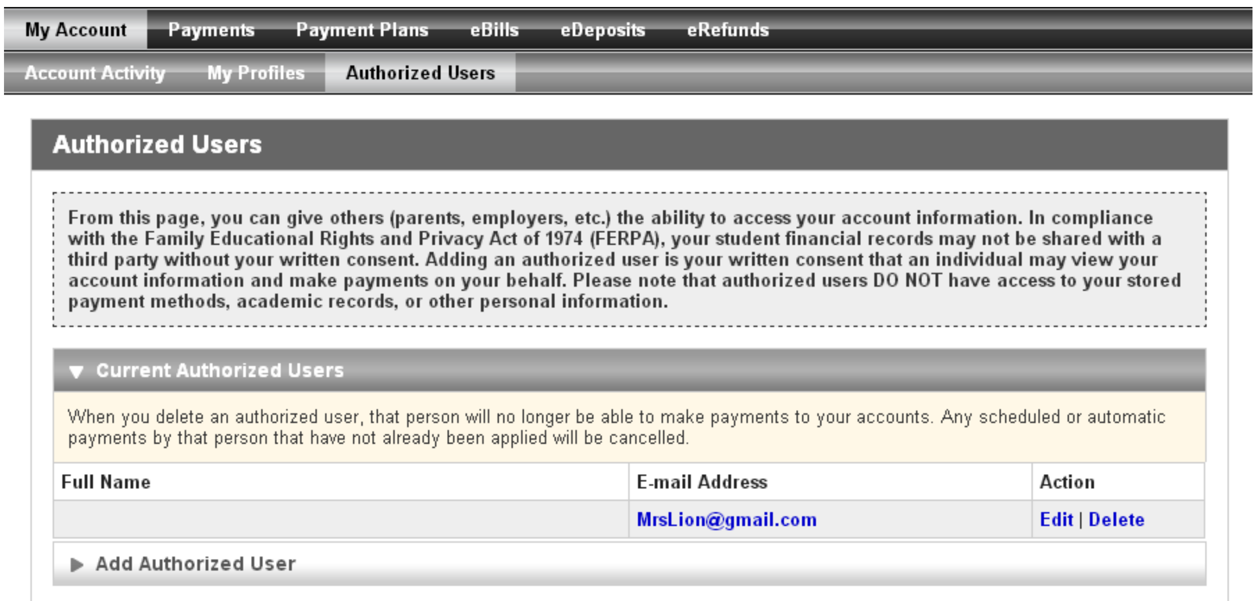
If the user does not save his or her receipt and needs to see a record of payments, the user should go to the Payment History tab. The Payment History tab shows:

- Who made the payment
- Date and time of payment
- Amount
- Memo
- Reference number

My Account Tab:

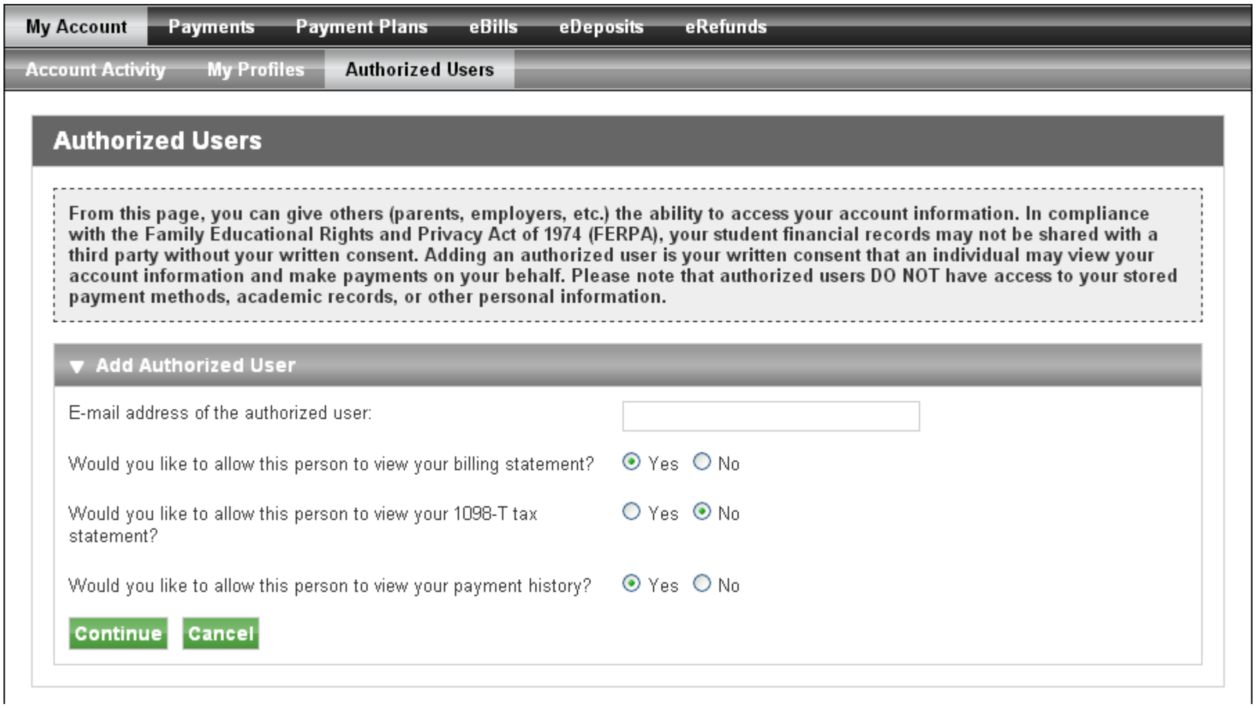
Authorized Users





From this page, a student can add a new authorized user. If an authorized user has already been created, the page allows the student to update settings or delete the user.

Adding an Authorized User



The student enters the user's e-mail address and set options:

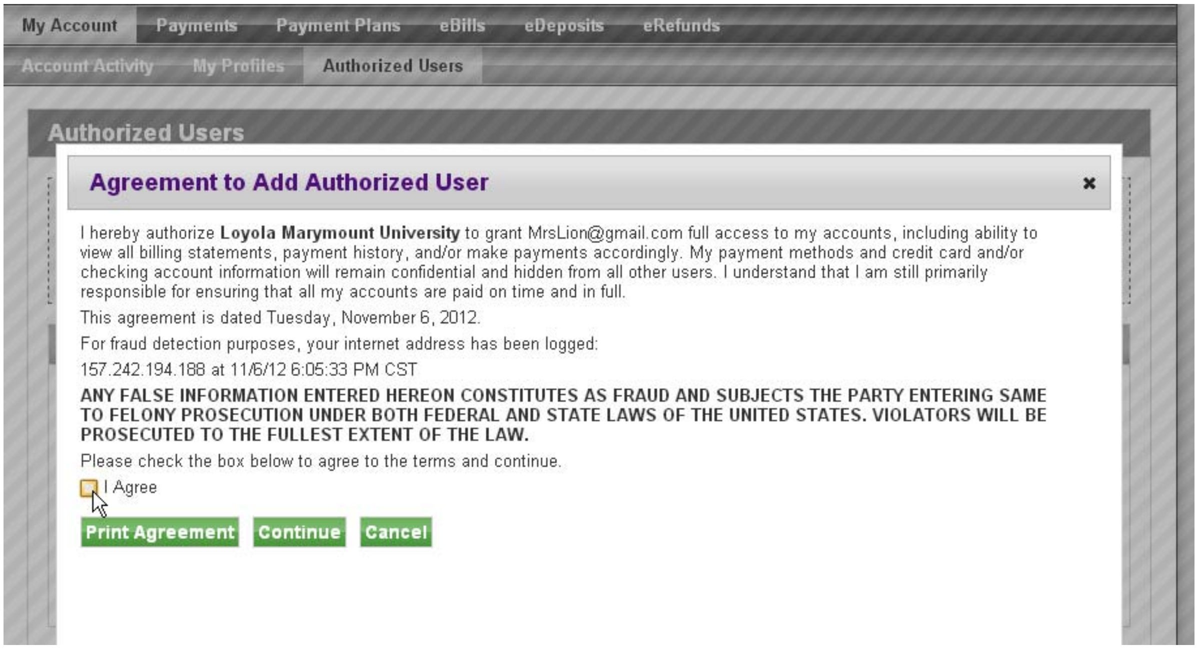
- **Allow the user to see the billing statement.** If the student says "No," the authorized user will see the current balance but not the billing statement.

- **Allow the user to see the payment history.** If the student says "No," then the authorized user will see only his or her own payments in the Payment History tab.

- **Allow the user to see the student's 1098-T tax statement.** If the student says "No," then the authorized user will not see any reference to the 1098-T tax form when they log in.

The student can change either of the options by licking the Edit link on the Authorized Users area.

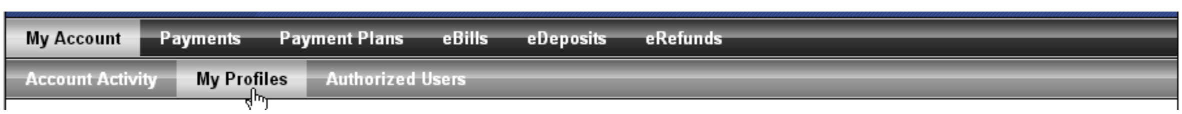
The Authorized User Agreement



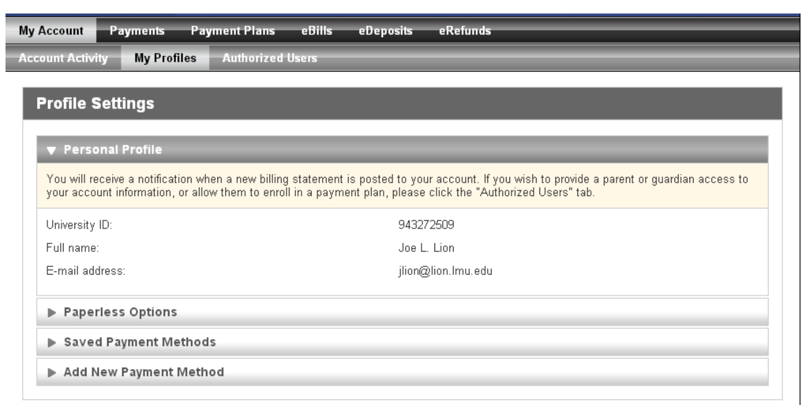
The agreement shows the student exactly what information the authorized user will and will not be able to see.

When the student clicks the “I Agree” check box and clicks “Continue” button, login information is e-mailed to the new authorized user.

My Profiles



Personal Profile:



E-mail Addresses: Authorized users can change the name or primary e-mail address in the profile, but students cannot.

Note: If the authorized user changes the primary e-mail address, the new address becomes the login ID and must be used at the next login.

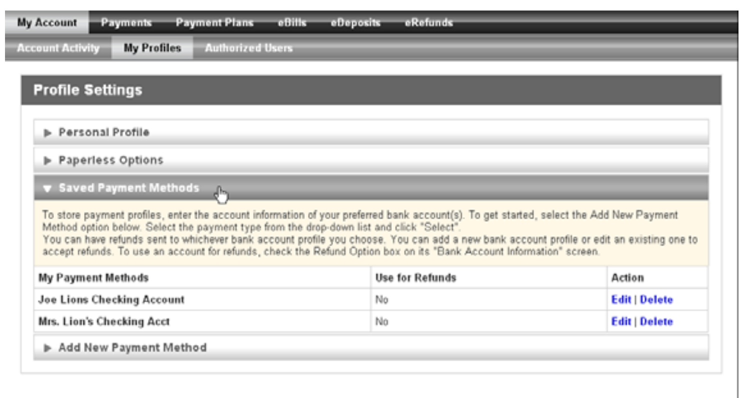
Changing Passwords: Authorized user can click the Change Password link to change their login passwords. Student passwords are that same as their PROWL account therefore, if a student needs their password reset they must talk to the Registrar's Office.

Paperless Options:

The student does have the option to receive the 1098-T form electronically through the Student Account Center. Electing to receive this form, which is generated annually, electronically means that no paper form will be mailed to the student's address on file.

Note: Only a student can make this decision. The authorized user cannot make the decision for the student. However, authorized users will have access to a copy of the 1098-T form if the student allows them to do so.

Saved Payment Methods:

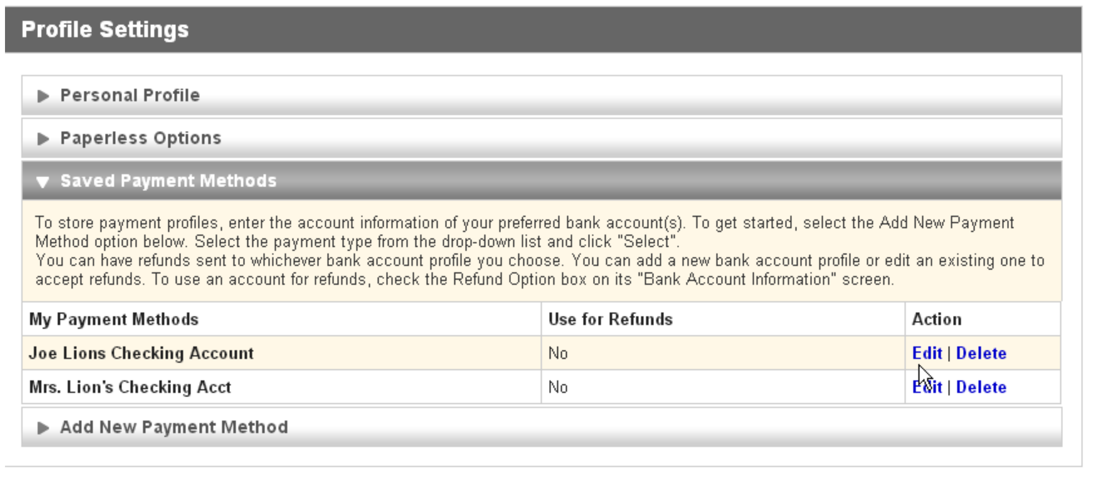


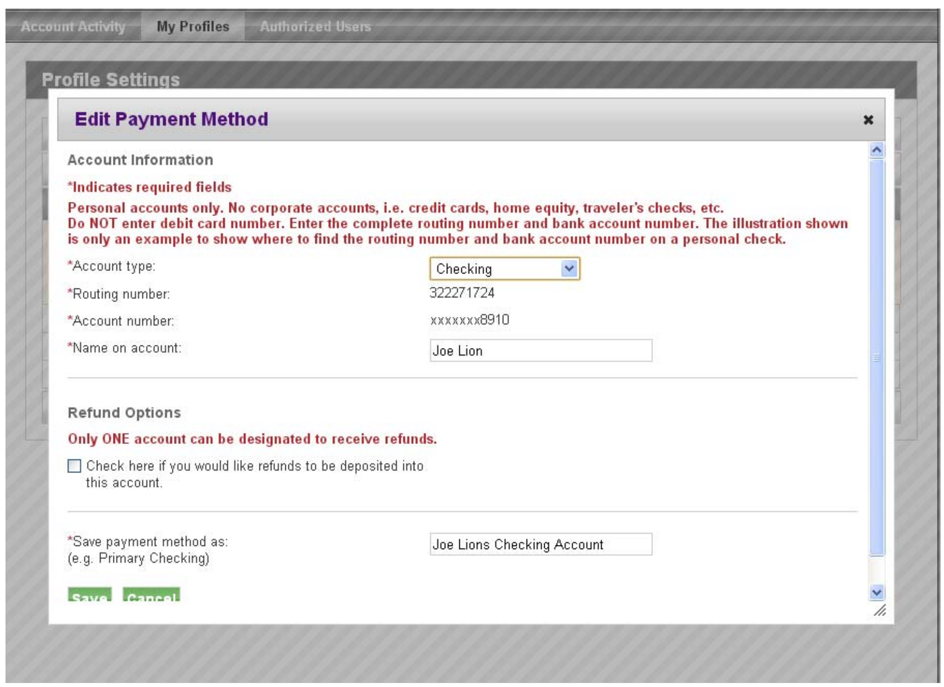
Payment Methods: Users can save a bank account payment method. User can save as many different payment methods as they want.

User cannot change the account number once the payment method is saved; if an account number changes later or becomes invalid, the user must delete the payment method and create a new one.

To add a new bank account payment method the student selects "Electronic Check (checking/savings) from the drop down and clicks go.

Editing a Bank Account Payment Method





Users can edit a saved bank account method by clicking on the pencil icon in the Payment Profile tab. Users are allowed to edit either the account nickname or the name on the account as it is recorded by the bank.

Refunds: Students can also designate what account they would like any electronic refunds by checking the box at the bottom of the Edit Bank Account Information box.