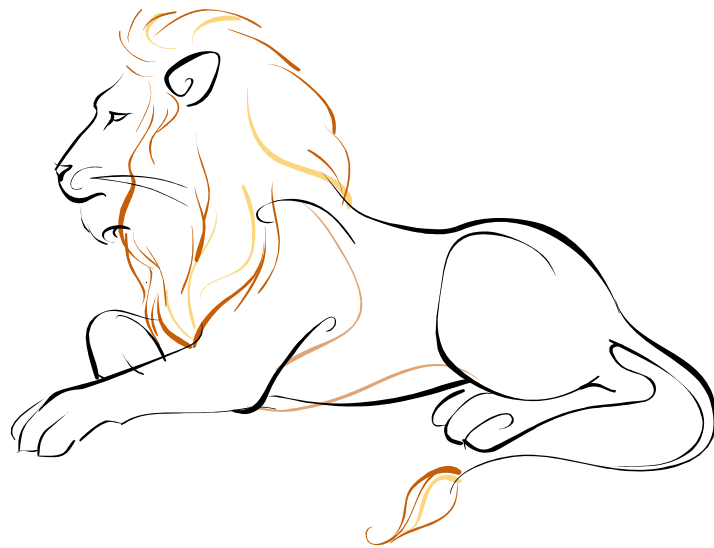


Student Account Center User Guide



Updated November 8, 2012

Student Login and Authorized User Login:

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

The screenshot shows the Loyola Marymount University Student Account Suite login page. It is divided into two main columns. The left column contains three sections: 'Students and Staff' with fields for University ID and PIN, 'Authorized Users' with fields for E-mail and Password, and 'Browser and Plugin Support' with icons for Internet Explorer, Firefox, and Safari. The right column contains a 'Welcome' message and a 'Student Account Suite Features' section with links to Student Account Center, E-Billing, Payment Plan Management, and Refunds.

Students and Staff

*Indicates required information

*University ID:

*PIN:

Login

Authorized Users

Login for parents or others who have been granted access.




*E-mail:

*Password:

Login

Forgot your password?
View saved **password hint**, or have a temporary password **e-mailed** to you.

Browser and Plugin Support

This site works best with Microsoft's Internet Explorer 7.0+, Mozilla's Firefox 2.0+, Apple's Safari 3.0+ and JavaScript must be enabled. For questions and concerns or to report an issue, please contact us at helpdesk@lmu.edu.

Welcome

Welcome to Loyola Marymount University Student Account Suite. This site is a 24x7 service offered to students and their families for viewing bills, making payments and managing their student account.

Students and staff may log in using their University ID and PIN. Parents, guardians, or employers wishing to access the system require student permission via the student's authorized user process. If you have any questions about the system, please send e-mail to helpdesk@lmu.edu.

Student Account Suite Features

Student Account Center

- Check your balance.
- Make a payment towards your balance.
- View your payment history.
- Store your payment methods for quick and easy payment.
- As a student, provide permission to others (parents, employers, etc) to view your bill and make payments.

E-Billing

- View and print your billing statement.

Payment Plan Management

- Enroll in a payment plan so you can pay your balance in installments.
- View your current payment plan status.
- Make a payment toward one of your installments.
- Schedule future installment payments.

Refunds

- Enter your bank account information so that refunds can be deposited into your account electronically.

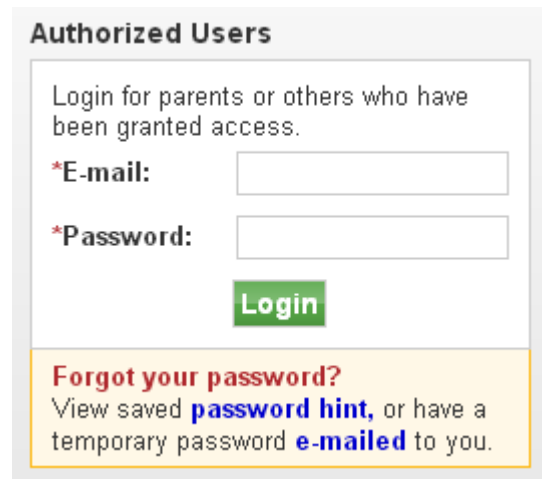
Student Login: Students log in at the top of the page, in the box labeled “Students and Staff.” Students log in credentials are their University ID and their Prowl PIN.

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.



Authorized Users

Login for parents or others who have been granted access.

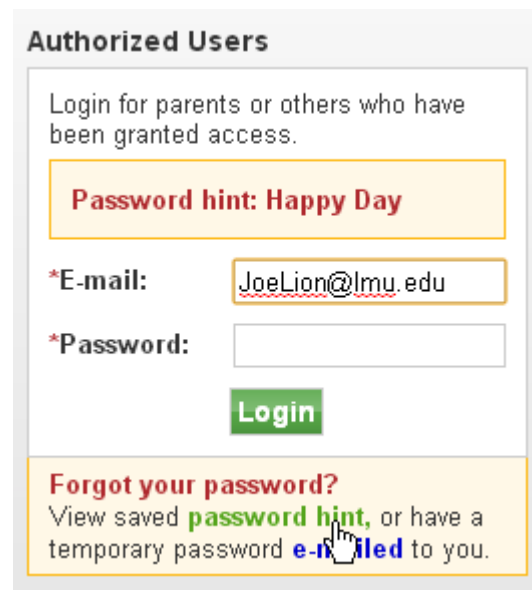
*E-mail:

*Password:

Login

Forgot your password?
View saved **password hint**, or have a temporary password **e-mailed** to you.

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



Authorized Users

Login for parents or others who have been granted access.

Password hint: Happy Day

*E-mail:

*Password:

Login

Forgot your password?
View saved **password hint**, or have a temporary password **e-mailed** to you.

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:

My Account

Payments

Payment Plans

eBills

eDeposits

eRefunds

Account Activity

My Profiles

Authorized Users

Account Alerts

To have your refunds deposited directly, complete your setup on the [Refund Account Setup](#) page.

Announcements

Important Dates and Deadlines for Spring 2013:

- November 22, 2012: Payment plans open
- December 19, 2012: Last day to set up on a 5 month payment plan without incurring a late fee (\$100.00)
- December 20, 2012: Payment due
- January 18, 2013: Deadline to add/drop courses and receive a 100% credit
- February 1, 2013: Deadline to complete sickness insurance waiver for new students

Students with a credit balance on their account due to financial aid or over payment may request Flexi dollars by emailing flexi@lmu.edu.

To pay your Commitment Fee or Housing Processing Fee, please be sure to click the Deposit Tab above. If you are paying a normal outstanding balance, then use the Payment tab.

Please contact the Student Accounts Office at 310.338.2711 or studacct@lmu.edu with any questions or concerns.

My Account

Current Account Status

Amount Due:

-\$102.00

Make a Payment

View Account Activity

Statements

eBill Statement

You currently do not have any billing statements.

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.

Announcements: The announcements 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.”

Account Activity

View transactions by term:

Fall 2012: 1,500.00



Go

Estimated Financial Aid

Currently you do not have pending financial aid for the selected term.

Fall 2012 Account Activity

To sort, click on the desired column header.

Description	Code	Date	Amount(\$)
Refund-ACH Direct Deposit	6245	29-OCT-2012	1,600.00
Payment - Webcheck	9017	24-OCT-2012	-100.00
Term Balance:			1,500.00

Make a Payment

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

The screenshot shows a web interface with a top navigation bar containing 'My Account', 'Payments', 'Payment Plans', 'eBills', 'eDeposits', and 'eRefunds'. Below this is a sub-navigation bar with 'Account Payment' and 'Payment History'. The main content area is titled 'Account Payment' and contains a box with the following text: 'Account Payment', 'Current balance includes activity since your last statement, including recent payments and new charges.', 'Amount Due: -\$500.00', and a green 'Make a Payment' button. A mouse cursor is pointing at the button.

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

The screenshot shows the 'Select Payment' form within the 'Account Payment' section. The form has a table with four columns: 'Amount', 'Payment Method', 'Confirmation', and 'Receipt'. Below the table, there is a 'Select Payment' section with a radio button selected for 'Current account balance: -\$500.00'. There is a text input field for the payment amount, a 'Payment Date' field with the value '11/6/12', and a 'Memo' field. A green 'Continue' button is at the bottom left.

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

The screenshot displays a web application interface for making a payment. At the top, there is a navigation bar with tabs: 'My Account', 'Payments', 'Payment Plans', 'eBills', 'eDeposits', and 'eRefunds'. Below this, a sub-navigation bar shows 'Account Payment' and 'Payment History'. The main content area is titled 'Account Payment' and contains a form with four columns: 'Amount', 'Payment Method', 'Confirmation', and 'Receipt'. The 'Payment Method' column is currently active, showing a 'Select Payment Method' section. This section includes a 'Payment amount: \$500.00' and a 'Payment method:' dropdown menu with the text 'Select Payment Method'. Below the dropdown are three buttons: 'Select', 'Previous Step', and 'Cancel'. A mouse cursor is hovering over the dropdown arrow. At the bottom of the form, there is a note about 'Electronic Check' payments, stating that they require a bank routing number and account number, and that payments can be made from a personal checking or savings account, but not from corporate checks, credit cards, home equity, or traveler's checks.

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

Account Payment

Amount **Payment Method** Confirmation Receipt

Select Payment Method

Payment amount: \$500.00

Payment method:
New Electronic Check (checking/savings)

Electronic Check - Electronic payments require a bank routing number and account number. Payments can be made from a personal checking or savings account. You cannot use corporate checks, i.e. credit cards, home equity, traveler's checks, etc.

Account Information
*Indicates required fields
Personal accounts only. No corporate accounts, i.e. credit cards, home equity, traveler's checks, etc.
Do NOT enter debit card number. Enter the complete routing number and bank account number. The illustration shown is only an example to show where to find the routing number and bank account number on a personal check.

*Account type:

*Routing number:
[\(View example\)](#)

*Account number:

*Confirm account number:

*Name on account:

Refund Options
Only ONE account can be designated to receive refunds.
☐ Check here if you would like refunds to be deposited into this account.

Option to Save
☐ Save this payment method for future use

Save payment method as:
(e.g. Primary Checking)

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

Account Payment

Amount Payment Method **Additional Items** Confirmation Receipt

The following items are available for purchase.
If an item allows you to choose "Pay Later", its charges will be added to your account.

Select	Item Description	Payment Due	Quantity	Amount/Total
<input type="checkbox"/>	Dewar Tuition Ins. Price: \$300.00 The Dewar Tuition Refund Plan (TRP) is administered by A.W.G. Dewar of Quincy, Massachusetts, and protects your educational investment by reimbursing 100% of tuition, room and board charges in case your son or daughter is forced to withdraw from school due to a personal illness or accident. In case of withdrawal due to a mental health condition, 60% of these charges are covered. Benefits available under the plan are coordinated with and reduced by the University's refund policy.	Payment due now	1	\$ 0.00

Current Total: \$ 0.00

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

Account Payment				
Amount	Payment Method	Additional Items	Confirmation	Receipt
<p>Submit Payment</p> <p>Please review the transaction details, agree to the terms and conditions, then submit your payment.</p> <p>Payment date: 11/6/12</p> <p>Payment amount: \$10.00</p> <p>Account type: Checking</p> <p>Routing number: 322271724</p> <p>Account number: xxxxxxx8910</p> <p>Name on account: Joe Lion</p> <p>E-mail: jlion@lion.lmu.edu</p> <p>Accept refunds: Yes</p> <p>Payment profile name: Joe Lions Checking Account</p> <p> <input type="button" value="Submit Payment"/> <input type="button" value="Previous Step"/> <input type="button" value="Cancel"/> </p>				

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

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

Account Payment

Your new ACH payment method has been saved.
Thank you for your payment. We will send you a confirmation e-mail with payment details. For a record of all your payments, please see the Payment History.

Amount	Payment Method	Additional Items	Confirmation	Receipt
--------	----------------	------------------	--------------	---------

Payment Receipt

Your payment in the amount of \$100.00 was successful. A confirmation email was sent to jlion@lion.lmu.edu. Please print this page for your records.

Confirmation number:	256
Payment date:	Tuesday, November 06, 2012
Amount paid:	\$100.00
Student name:	Joe L. Lion
Paid to:	Loyola Marymount University
Account number:	xxxxxx2485
Name on account:	Mrs. Lion
Account type:	Checking

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 image displays two sequential screenshots of a web application's 'eDeposits' tab. The top screenshot shows the 'Deposit Payment' section with a table header containing 'Amount', 'Payment Method', 'Confirmation', and 'Receipt'. Below the header, a box titled 'Make Deposit Payment for Term' prompts the user to 'Select a term for making a payment if available.' It features a 'Term:' label, a dropdown menu with options 'Spring 2013', 'Select Term', 'Spring 2013', and 'Fall 2012', and a green 'Select' button. The bottom screenshot shows the same 'Deposit Payment' section, but the dropdown menu is now open, showing options 'Select Deposit Payment', 'Select Deposit Payment', 'Spring 2013 Study Abroad Deposit', and 'Spring 2013 Tuition Deposit'. The 'Select' button remains visible.

Amount	Payment Method	Confirmation	Receipt
Make Deposit Payment for Term Select a term for making a payment if available. Term: Spring 2013 Select			

Amount	Payment Method	Confirmation	Receipt
Make Deposit Payment for Term Select a term for making a payment if available. Term: Spring 2013 Select			
Make Deposit Payment Select a deposit account for making a payment from the drop-down menu below. Deposit Account: Select Deposit Payment Select			

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

Deposit Payment

Amount	Payment Method	Confirmation	Receipt
--------	----------------	--------------	---------

Make Deposit Payment for Term
Select a term for making a payment if available.
Term: Spring 2013 Select

Make Deposit Payment
Select a deposit account for making a payment from the drop-down menu below.
Deposit Account: Spring 2013 Tuition Deposit Select

Spring 2013 Tuition Deposit
Tuition Deposit - Webcheck
Deposit name: Spring 2013 Tuition Deposit
Term: Spring 2013
Maximum payment amount: \$99,000.00
Payment amount: \$
Continue Cancel

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).

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

Deposit Payment

Amount	Payment Method	Confirmation	Receipt
--------	----------------	--------------	---------

Make Deposit Payment for Term
Select a term for making a payment if available.
Term: Spring 2013 Select

Make Deposit Payment
Select a deposit account for making a payment from the drop-down menu below.
Deposit Account: Spring 2013 Study Abroad Deposit Select

Spring 2013 Study Abroad Deposit
Study Abroad Depo. Web-Spring
Deposit name: Spring 2013 Study Abroad Deposit
Term: Spring 2013
Maximum payment amount: \$500.00
Payment amount: \$500.00
Continue Cancel

Making a Deposit – Selecting a Payment Method

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

Deposit Payment

Amount	Payment Method	Confirmation	Receipt
--------	----------------	--------------	---------

Select Payment Method

Payment amount: \$100.00

Payment method:

Select Payment Method

Select **Previous Step** **Cancel**

Electronic Check - Electronic payments require a bank routing number and account number. Payments can be made from a personal checking or savings account. You cannot use corporate checks, i.e. credit cards, home equity, traveler's checks, etc.

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

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

Deposit Payment			
Amount	Payment Method	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 Submit Payment Previous Step Cancel			

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

[My Account](#) [Payments](#) [Payment Plans](#) [eBills](#) [eDeposits](#) [eRefunds](#)

eRefunds



eRefunds puts money in your account...FAST!

Direct Deposit is the secure and convenient way to get your refund.
No more trips to the bank or waiting for a paper check.
Test... Signing up for the direct deposit is the more secure and convenient way for students to receive their refunds.

[Set up Account](#)

Direct Deposit Bank Account	
Account Description	Actions
No account has been set up.	Set up Account

Refund History for Joe L. Lion

No past refunds were found.

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.

[My Account](#) [Payments](#) [Payment Plans](#) [eBills](#) [eDeposits](#) [eRefunds](#)

eRefunds

Set Up Refund Account ✕

Would you like to use an existing account or set up a new account?

☒ Joe Lions Checking Account - xxxxxxx8910

☐ Mrs. Lion's Checking Acct - xxxxxx2485

☐ Set up a new account.

[Continue](#)

Payment Plans Tab:

Enrolling In a Payment Plan

[My Account](#) [Payments](#) [Payment Plans](#) [eBills](#) [eDeposits](#) [eRefunds](#)

Payment Plans

Available Payment Plans

New Payment Plans are available.

You are not currently enrolled in available payment plans but have the option to do so.

Enroll Now

Payment Plan History

Plan Name	Enrollment Date	Removal Date	Finance Charge(\$)	Installments
5 Month Payment Plan - Automatic Deduction View Agreement	2011-04-05 00:00:00.0		0.00	Show

[My Account](#) [Payments](#) [Payment Plans](#) [eBills](#) [eDeposits](#) [eRefunds](#)

Plan Enrollment

Select Payment Plan [Schedule Payment Plan](#) [Payment Plan Agreement](#)

View Payment Plans for Term: Spring 2013 **Select**

5 Month-Automatic Deduction (No Enrollment Fee)

This payment plan is a semester plan which allows a student to make five monthly payments by automatic deduction from a checking/savings account.

5 Month-Automatic Deduction (No Enrollment Fee) Details

Term(s): Spring 2013

Previous balance term(s): Spring 2006 , Fall 2006 , Spring 2007 , Fall 2009 , Spring 2010 , Fall 2010 , Spring 2011 , Summer Session I , Summer Session II , Fall 2012 , Summer I 2013 , Summer II 2013 , Fall 2013

Enrollment deadline: 11/7/12

Scheduled payments: Required

Setup fee: \$0.00

Minimum down payment: \$0.00

Number of payments: 5

Payment frequency: Fixed Dates

Late payment fee: \$75.00

Continue **Cancel**

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 screenshot displays a web application interface for plan enrollment. At the top, a navigation bar includes links for 'My Account', 'Payments', 'Payment Plans' (which is the active tab), 'eBills', 'eDeposits', and 'eRefunds'. Below this, a section titled 'Plan Enrollment' contains three tabs: 'Select Payment Plan' (highlighted in green), 'Schedule Payment Plan', and 'Payment Plan Agreement'. The 'Select Payment Plan' tab features a form with two main sections. The first section, 'View Payment Plans for Term:', includes a dropdown menu set to 'Spring 2013' and a green 'Select' button. The second section, 'Select Payment Plan', has a dropdown menu with a mouse cursor hovering over it and another green 'Select' button. Below these sections, two payment plan options are listed: '5 Month-Mail (\$150 Enrollment Fee):' and '5 Month-Automatic Deduction (No Enrollment Fee):'. Each option is followed by a descriptive paragraph explaining the plan's details.

Plan Enrollment		
Select Payment Plan	Schedule Payment Plan	Payment Plan Agreement
View Payment Plans for Term: Spring 2013 Select		
Select Payment Plan Select		
5 Month-Mail (\$150 Enrollment Fee):	This payment plan is a semester plan which allows a student to make five monthly payments by mail, in-person at the Student Accounts Office, or through this system on the "Payment" tab.	
5 Month-Automatic Deduction (No Enrollment Fee):	This payment plan is a semester plan which allows a student to make five monthly payments by automatic deduction from a checking/savings account.	

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.

My Account
Payments
Payment Plans
eBills
eDeposits
eRefunds

Plan Enrollment

Select Payment Plan

Schedule Payment Plan

Payment Plan Agreement

View Payment Plans for Term:
Spring 2013
Select

5 Month-Automatic Deduction (No Enrollment Fee)
Select

5 Month-Automatic Deduction (No Enrollment Fee)
This payment plan is a semester plan which allows a student to make five monthly payments by automatic deduction from a checking/savings account.

5 Month-Automatic Deduction (No Enrollment Fee) Details
Term(s): Spring 2013
Previous balance term(s): Spring 2006 , Fall 2006 , Spring 2007 , Fall 2009 , Spring 2010 , Fall 2010 , Spring 2011 , Summer Session I , Summer Session II , Fall 2012 , Summer I 2013 , Summer II 2013 , Fall 2013
Enrollment deadline: 11/7/12
Scheduled payments: Required
Setup fee: \$0.00
Minimum down payment: \$0.00
Number of payments: 5
Payment frequency: Fixed Dates
Late payment fee: \$75.00

Continue
Cancel

Plan Enrollment – The Budget Worksheet

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		
Down payment			0.00

Display Payment Schedule

Previous Step
Cancel

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 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

The screenshot shows a web interface for Plan Enrollment. At the top is a navigation bar with links: My Account, Payments, Payment Plans (highlighted), eBills, eDeposits, and eRefunds. Below the navigation bar is a section titled 'Plan Enrollment' with four tabs: Select Payment Plan, Schedule Payment Plan, Select Payment Method (highlighted), and Payment Plan Agreement. A text block explains that scheduled payments are required and that the selected payment method will be used for plan fees. Below this is a 'Select Payment Method' section containing a 'Payment Method' dropdown menu with 'Joe Lions Checking Account' selected, and three buttons: Select, Previous Step, and Cancel. A note about 'Electronic Check' requirements is also present.

Plan Enrollment

Select Payment Plan Schedule Payment Plan **Select Payment Method** Payment Plan Agreement

Scheduled payments are required for this payment plan. The payment method you select will be used to pay your plan fees which are due now, if any. Future installments will be paid using the same payment method, by this system, on the date they are due. You are responsible for making sure that the payment method remains valid for the duration of this payment plan. If installment amounts change (due to new charges or credits), the scheduled payments will adjust accordingly.

Select Payment Method

Payment Method
Joe Lions Checking Account

Select Previous Step Cancel

Electronic Check - Electronic payments require a bank routing number and account number. Payments can be made from a personal checking or savings account. You cannot use corporate checks, i.e. credit cards, home equity, traveler's checks, etc.

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 immediately 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
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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@mu.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

Payment Plans

Available Payment Plans

New Payment Plans are available.

[Enroll Now](#)

Currently Enrolled Plans

You are currently enrolled in this payment plan. To pay an installment or other partial plan amount, please go to [Payments](#).

Plan name:

5 Month-Automatic Deduction (No Enrollment Fee) | [View Agreement](#)

Term:

Spring 2013

Enrollment date:

11/06/2012

Payment method:

Joe Lions Checking Account | [Change](#)

Payoff amount:

\$25,225.50 | [Pay off Plan](#)

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

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

My Account
Payments
Payment Plans
eBills
eDeposits
eRefunds

Account Payment
Payment History

Payment Plan Payment

Amount

Payment Method

Confirmation

Receipt

5 Month-Automatic Deduction (No Enrollment Fee)

Enrollment Date:

11/06/2012

Payment Method:

Joe Lions Checking Account

Payoff Amount:

\$25,225.50

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

Cancel
Continue

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

Payment Plan Payment

Amount

Payment Method

Additional Items

Confirmation

Receipt

Select Payment Method

Payment amount: \$25,225.50

Payment method:

Mrs. Lion's Checking Acct

Select

Previous Step

Cancel

Electronic Check

- Electronic payments require a bank routing number and account number. Payments can be made from a personal checking or savings account. You cannot use corporate checks, i.e. credit cards, home equity, traveler's checks, etc.

Payment Plan 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:				
Payment amount:	\$25,225.50			
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			
Submit Payment Previous Step Cancel				

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.

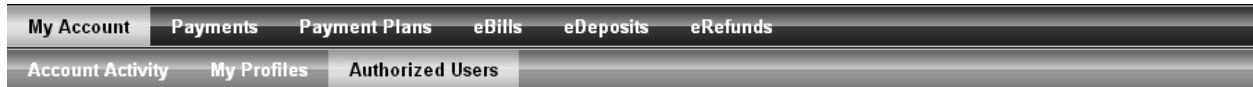
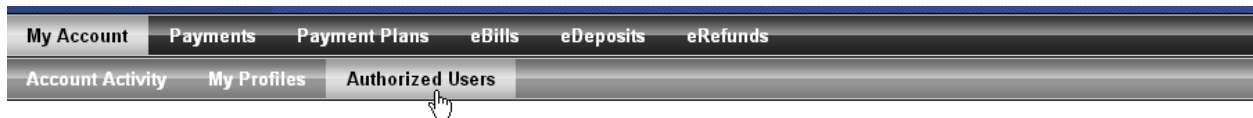
The payment receipt is the most detailed record of an individual payment and should be retained by the user. The student or authorized user should print it for their records.

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



Authorized Users

From this page, you can give others (parents, employers, etc.) the ability to access your account information. In compliance with the Family Educational Rights and Privacy Act of 1974 (FERPA), your student financial records may not be shared with a third party without your written consent. Adding an authorized user is your written consent that an individual may view your account information and make payments on your behalf. Please note that authorized users DO NOT have access to your stored payment methods, academic records, or other personal information.

▼ Current Authorized Users

When you delete an authorized user, that person will no longer be able to make payments to your accounts. Any scheduled or automatic payments by that person that have not already been applied will be cancelled.

Full Name	E-mail Address	Action
	MrsLion@gmail.com	Edit Delete

► Add Authorized User

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

Authorized Users

From this page, you can give others (parents, employers, etc.) the ability to access your account information. In compliance with the Family Educational Rights and Privacy Act of 1974 (FERPA), your student financial records may not be shared with a third party without your written consent. Adding an authorized user is your written consent that an individual may view your account information and make payments on your behalf. Please note that authorized users DO NOT have access to your stored payment methods, academic records, or other personal information.

▼ Add Authorized User

E-mail address of the authorized user:

Would you like to allow this person to view your billing statement? ☒ Yes ☐ No

Would you like to allow this person to view your 1098-T tax statement? ☐ Yes ☒ No

Would you like to allow this person to view your payment history? ☒ Yes ☐ No

Continue **Cancel**

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 clicking the Edit link on the Authorized Users area.

The Authorized User Agreement

The screenshot shows a web interface with a top navigation bar containing 'My Account', 'Payments', 'Payment Plans', 'eBills', 'eDeposits', and 'eRefunds'. Below this is a secondary bar with 'Account Activity', 'My Profiles', and 'Authorized Users'. The 'Authorized Users' tab is active, displaying a dialog box titled 'Agreement to Add Authorized User'. The dialog contains the following text:

I hereby authorize **Loyola Marymount University** to grant MrsLion@gmail.com full access to my accounts, including ability to view all billing statements, payment history, and/or make payments accordingly. My payment methods and credit card and/or checking account information will remain confidential and hidden from all other users. I understand that I am still primarily responsible for ensuring that all my accounts are paid on time and in full.

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 6:05:33 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.

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

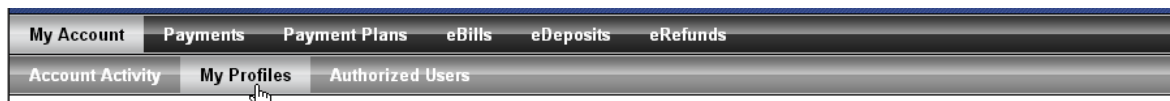
☐ I Agree

At the bottom of the dialog are three buttons: 'Print Agreement', 'Continue', and 'Cancel'.

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:

The screenshot shows the 'Profile Settings' section of the web interface. It has the same top navigation bar as the previous screenshots. The 'My Profiles' tab is active, and the 'Personal Profile' section is expanded. It contains the following information:

You will receive a notification when a new billing statement is posted to your account. If you wish to provide a parent or guardian access to your account information, or allow them to enroll in a payment plan, please click the "Authorized Users" tab.

University ID:	943272509
Full name:	Joe L. Lion
E-mail address:	jlion@lion.lmu.edu

Below this information are three expandable sections: 'Paperless Options', 'Saved Payment Methods', and 'Add New Payment Method'.

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 screenshot shows the 'Profile Settings' page with a navigation bar at the top containing 'My Account', 'Payments', 'Payment Plans', 'eBills', 'eDeposits', and 'eRefunds'. Below this is a sub-navigation bar with 'Account Activity', 'My Profiles', and 'Authorized Users'. The main content area is titled 'Profile Settings' and contains three expandable sections: 'Personal Profile', 'Paperless Options', and 'Saved Payment Methods'. The 'Paperless Options' section is expanded, showing 'Paperless 1098-T' with the text 'You have switched to paperless 1098-T.' and a green 'Change' button.

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:

The screenshot shows the 'Profile Settings' page with the same navigation bars as the previous image. The 'Saved Payment Methods' section is expanded, displaying a yellow informational box with instructions on how to add and manage payment methods. Below the box is a table with columns 'My Payment Methods', 'Use for Refunds', and 'Action'. The table lists two payment methods: 'Joe Lions Checking Account' and 'Mrs. Lion's Checking Acct', both marked 'No' for 'Use for Refunds'. Each row has 'Edit | Delete' links in the 'Action' column. An 'Add New Payment Method' link is at the bottom of the section.

My Payment Methods	Use for Refunds	Action
Joe Lions Checking Account	No	Edit Delete
Mrs. Lion's Checking Acct	No	Edit Delete

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

Profile Settings

► Personal Profile

► Paperless Options

▼ Saved Payment Methods

To store payment profiles, enter the account information of your preferred bank account(s). To get started, select the Add New Payment Method option below. Select the payment type from the drop-down list and click "Select". You can have refunds sent to whichever bank account profile you choose. You can add a new bank account profile or edit an existing one to accept refunds. To use an account for refunds, check the Refund Option box on its "Bank Account Information" screen.

My Payment Methods	Use for Refunds	Action
Joe Lions Checking Account	No	Edit Delete
Mrs. Lion's Checking Acct	No	Edit Delete

► Add New Payment Method

Account Activity | **My Profiles** | Authorized Users

Profile Settings

Edit Payment Method

Account Information

***Indicates required fields**
Personal accounts only. No corporate accounts, i.e. credit cards, home equity, traveler's checks, etc.
Do NOT enter debit card number. Enter the complete routing number and bank account number. The illustration shown is only an example to show where to find the routing number and bank account number on a personal check.

*Account type:

*Routing number:

*Account number:

*Name on account:

Refund Options

Only ONE account can be designated to receive refunds.

☐ Check here if you would like refunds to be deposited into this account.

*Save payment method as:
(e.g. Primary Checking)

Save

Cancel

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.