

Logging In and Viewing Important Account Information

Through your Self Service and Transact (formerly known as CashNet) accounts you will have the ability to review and/or complete the following items:

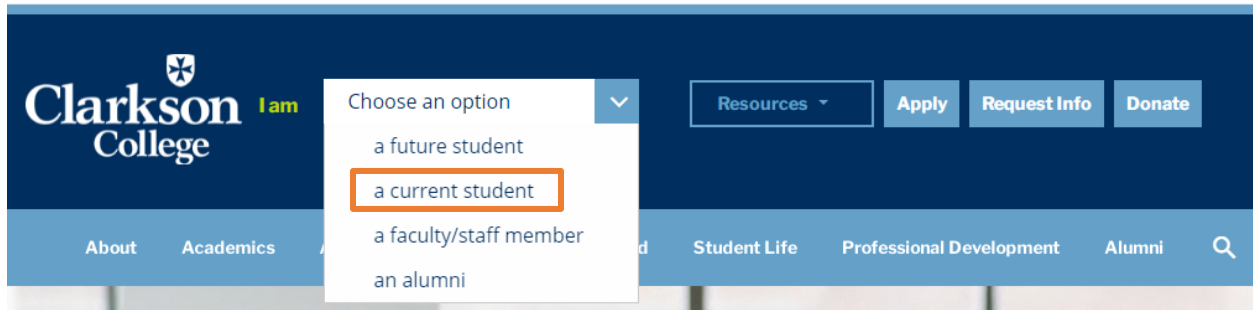
- [Review Balance and Billing Statements](#)
- [Make a Payment](#)
- [Payment History](#)
- [Installment Payment Plans](#)
- [eRefunds \(Electronic Refunds\)](#)
- [Payer Invitations](#)
- [Saved Payment Methods](#)
- [SMS Alert Set up](#)

**Steps below will provide you with “How To’s” when logging into [Self Service](#) or [Transact](#)

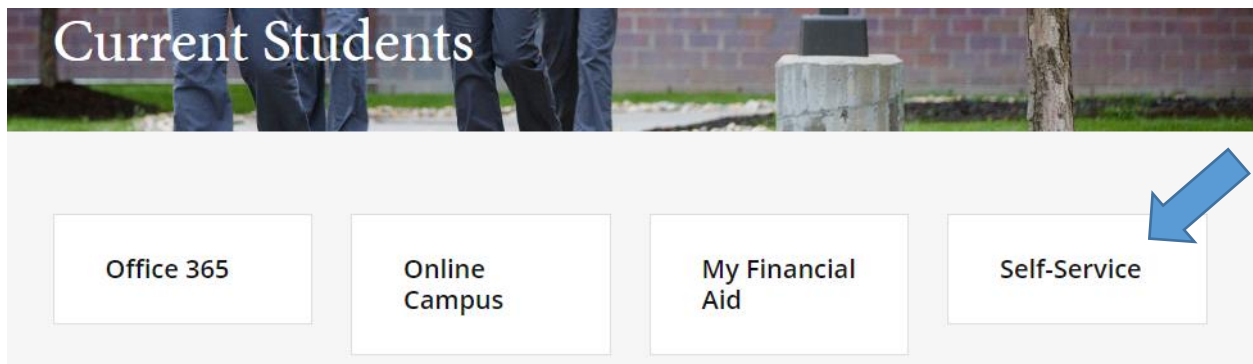
Logging into Self Service

Step 1) Navigate to the [Clarkson College Website](#).

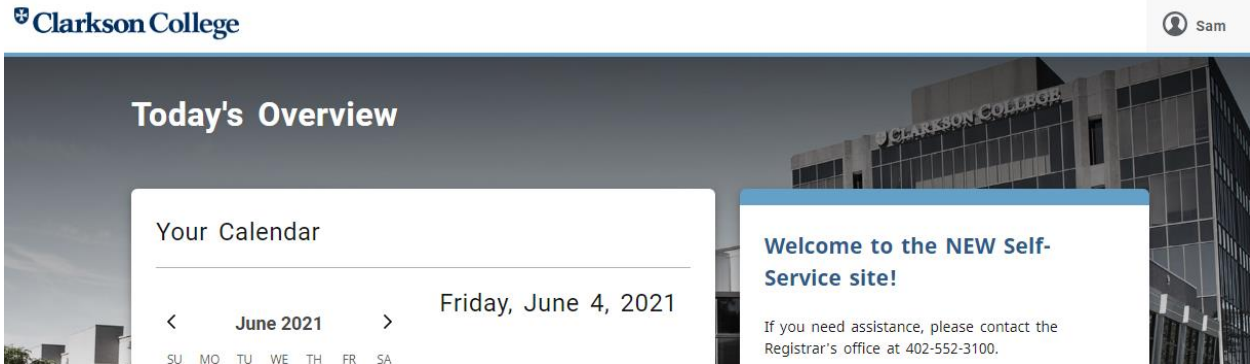
Step 2) At the Top/Center of the page, select “**a current student**” from the “Choose an option” dropdown menu.



Step 3) Select **Self Service**.

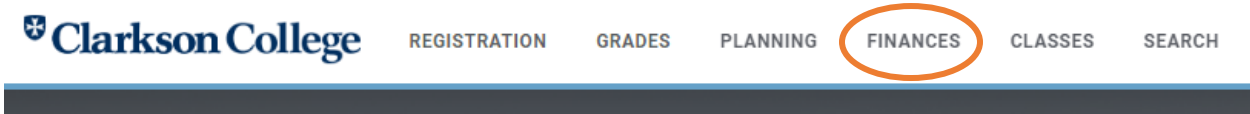


Step 4) Your Single Sign On (SSO) will automatically log you into your Self Service account

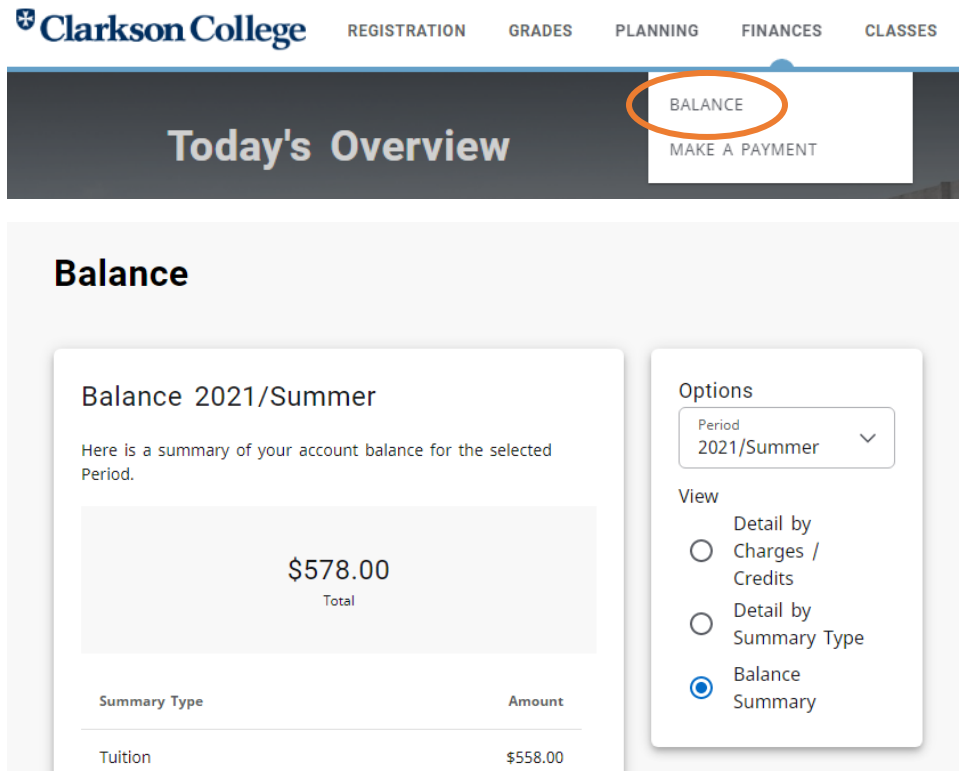


Reviewing your Balance and Billing Statement

Step 1) Select the Finances tab, located in the horizontal navigation bar.



Step 2) Click Balance



Step 3) Navigate to Options, located on the right-hand side of your screen to customize your statement view. ***Your balance can also be found after logging into Transact.*

- Period – using the dropdown, select the term you wish to view
- View – select detail by charges/credits (detailed look of each line item charged)

Options

Period
2021/Summer ▼

View

Detail by Charges / Credits

Detail by Summary Type

Balance Summary

Balance 2021/Summer

Here is your Account History for the selected Period.

\$478.00

Total

Charges					\$578.00 ^
Date	Period	Type	Description	Due Date	Amount
6/3/2021	2021/Summer	Charge	Tuition NS		\$558.00
6/3/2021	2021/Summer	Charge	Fee Tech Fee On Camp		\$20.00

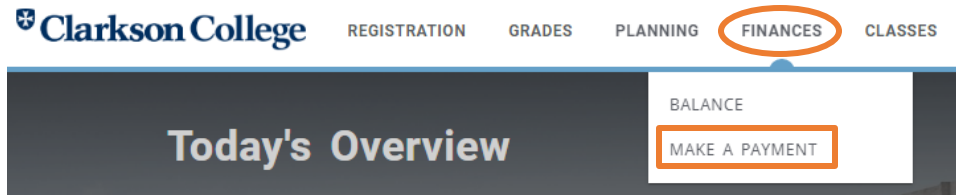
Credits						\$100.00	^
Date	Period	Type	Description	Due Date	Amount		
6/3/2021	2021/Summer	Financial Aid	Grant Pell Federal		\$100.00		

Anticipated Financial Aid						\$0.00	^
No financial anticipated aid records exist for the selected period.							

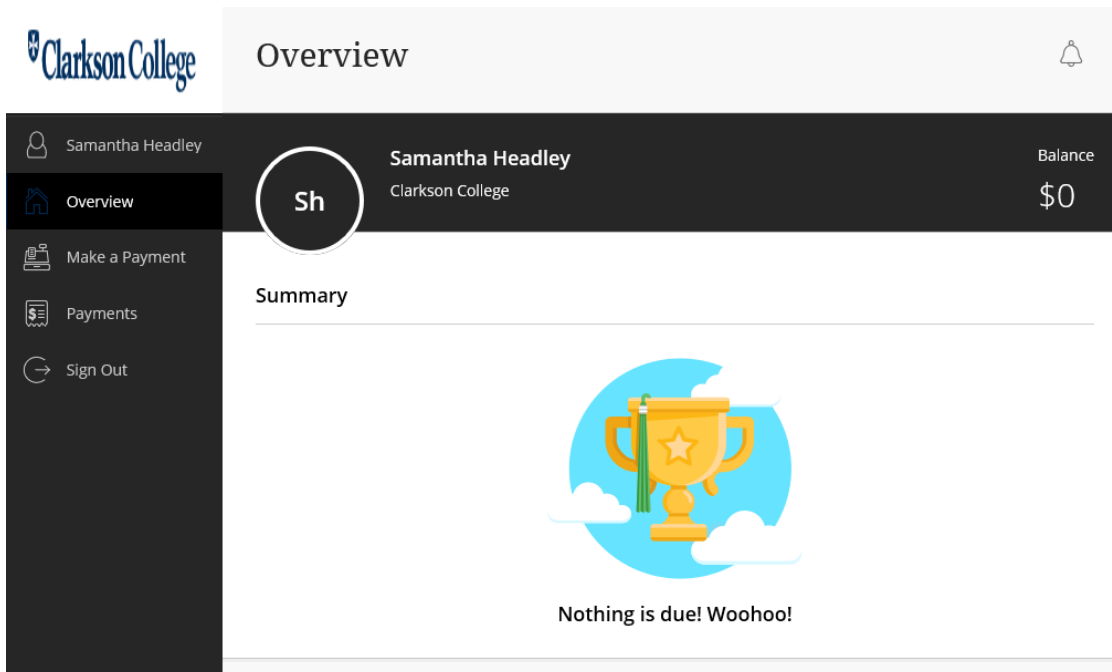
Logging into Transact

Step 1) [Repeat Step 1](#) under *Reviewing your Balance and Billing Statement*.

Step 2) Click *Make a Payment*



Step 3) If successfully logged in, the image illustrated below should appear. This is the home page of your Transact account.



Payment History

Step 1) Log into [Self Service, Transact](#).

Step 2) From the home page of your Transact account, your recent payments can be found.

Clarkson College

Sign up Send a payer invitation

Recent payments [View all](#)

Date	Description	Receipt	Amount
10/10/19	2019FA: Fall 2019	#8917	\$2,479.00
9/10/19	2019FA: Fall 2019	#8288	\$2,479.00
8/26/19	Enrollment fee 2019FA: Fall 2019	#7888	\$35.00

Make a payment

Step 3) To view any payment made, click **the receipt #** located to the left of the transaction amount (*illustrated above with the blue arrow*).

Payer Invitations

Adding a Payer to your account will allow this individual to log into your account to make payments, sign up to receive alerts, etc.

Step 1) Log into [Self Service, Transact](#)

Step 2) From the home page of your Transact account, navigate to your profile or the tab located within the vertical menu with “your name.”

Step 3) Under “Payers” listed within the main body of your screen, click “Send a payer invitation”

[+ Add payment method](#)

Payers
Do you know someone that would like to help you pay? Invite them to have access to your account!

[+ Send a payer invitation](#)

Direct deposit refunds
Receive refunds and disbursements faster with direct deposit.

Step 3) Fill in all required fields: name, email address, and personal message to payer. Once completed, click **Send Invitation**.

Clarkson

Profile

Payer Invitation

acie Klegl
00283916

Payer information

* **First name**

* **Last name**

* **Email address**

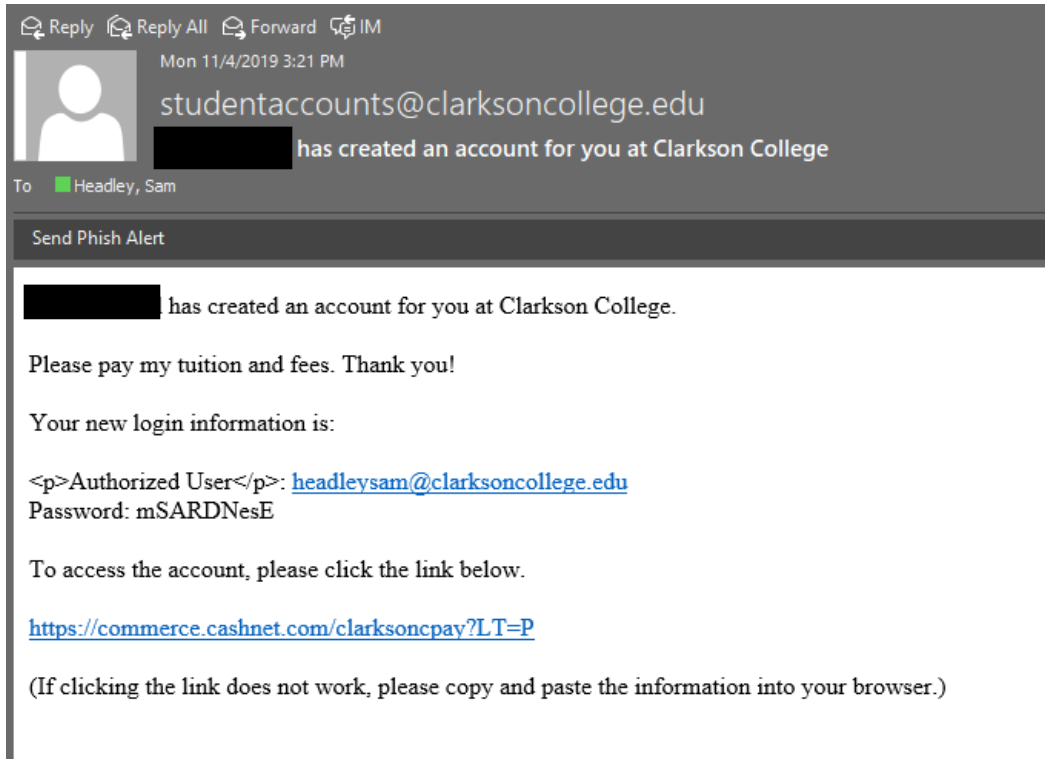
* **Confirm email address**

Message to payer

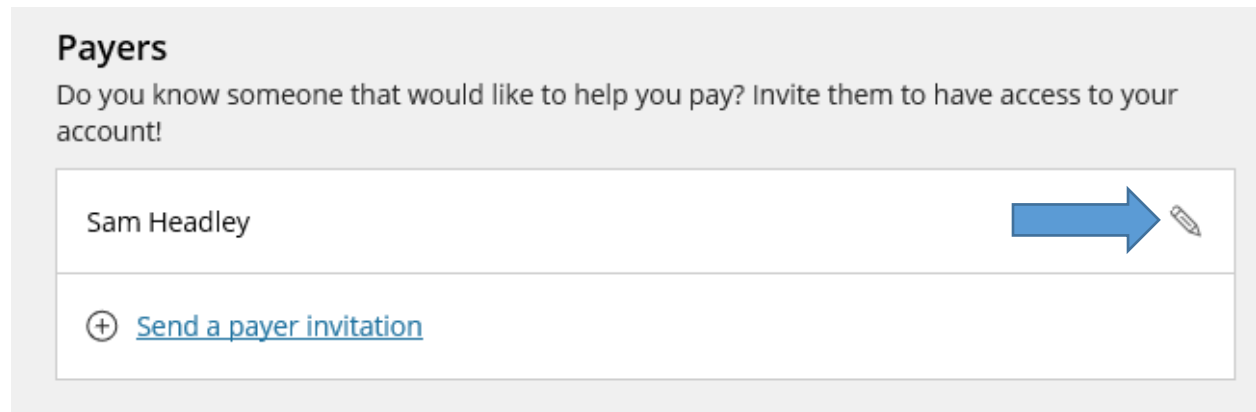
Maximum 250 characters

egl.Gracie@c

An email will be sent to your payer through the entered email address which will include their credentials and the login website address.



The payer(s) can be reviewed through your profile. To review or edit the payers, repeat Steps 1 & 2. Select the pencil icon or edit across from their name.



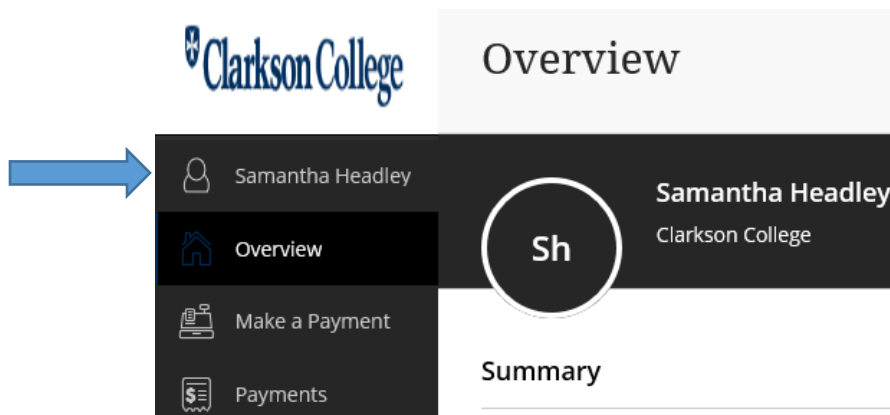
Payer information will appear as shown below. Payer information can be updated or credentials and website information can be resent by clicking “Resend payer invitation.” The payer can be removed by selecting “Remove payer.” **Be sure to “Save” all changes.**

The screenshot shows a 'Profile' window titled 'Payers'. It contains a 'Payer information' section with two input fields: 'Name' (Sam Headley) and 'Email address' (headleysam@clarksoncollege.edu). Below this is a 'Payer access' section with two buttons: 'Remove payer' and 'Resend payer invitation'. At the bottom of the window are 'Cancel' and 'Save' buttons.

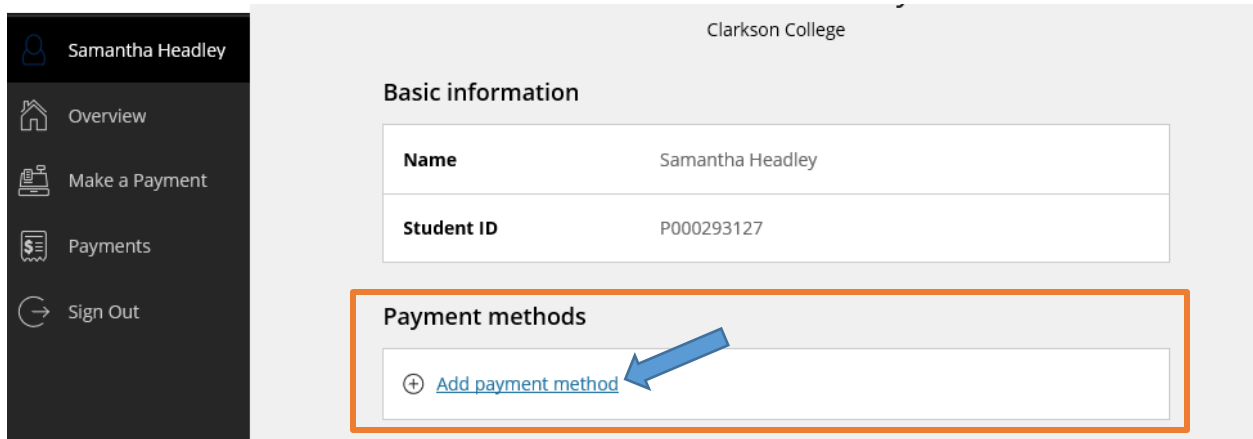
Saved Payment Methods

Step 1) Log into [Self Service](#), [Transact](#)

Step 2) Select your profile tab located in the vertical menu or the tab title with “Your Name”



Step 3) Navigate to payment methods. To add a payment method, click the link “Add payment method.”



Clarkson College

Samantha Headley

Overview
Make a Payment
Payments
Sign Out

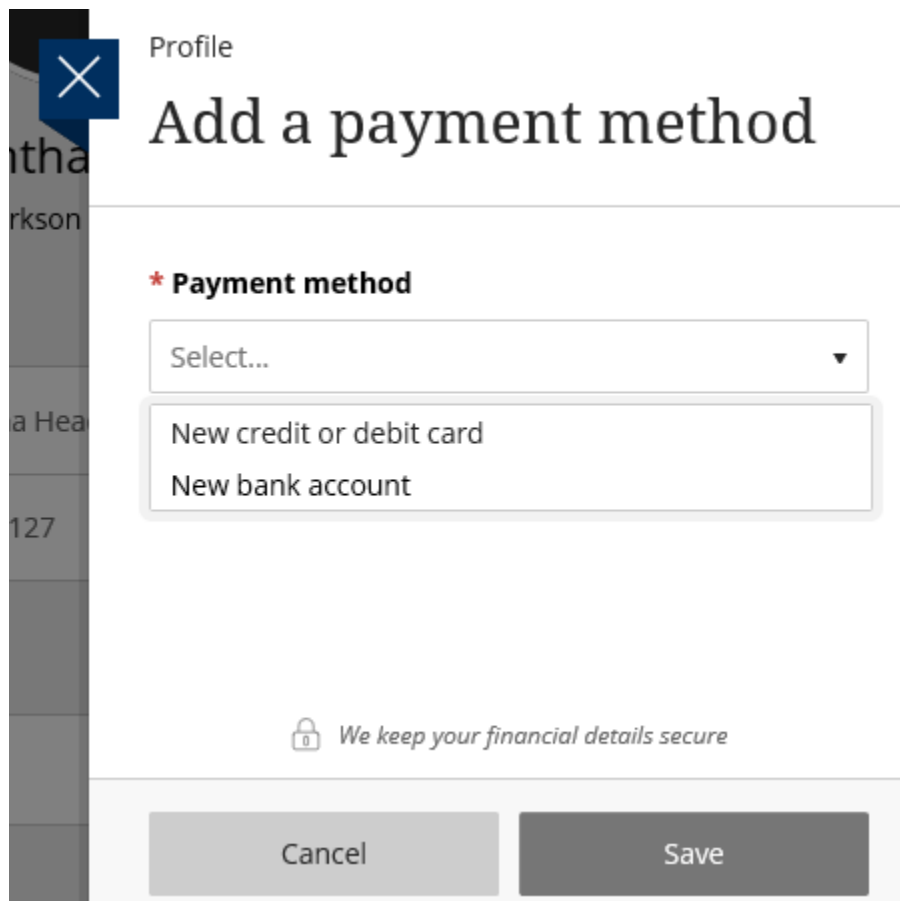
Basic information

Name	Samantha Headley
Student ID	P000293127

Payment methods

+ [Add payment method](#)

Step 4) Select the method of payment you wish to save and click **save**.




Profile

Add a payment method

* **Payment method**

Select...

New credit or debit card
New bank account

 We keep your financial details secure

Cancel Save






Step 5) Fill in all required fields to complete. Below are examples of the two methods of payments offered through Transact. Be sure to click **Save** to save all changes for future use.

Credit Cards

Profile ✕

Add a payment method

New credit or debit card ▾

*** Card number**

① Card number required

*** Expiration date** *** Security code** ①

*** Zip/Postal code**

Card nickname ①

Maximum 17 characters

Cancel Save

Electronic Check/Bank Account

Profile ✕

Add a payment method

*** Account holder name**

① Account holder name required

*** Account type**

Checking
 Savings

*** Routing transit number** ①

*** Bank account number** ①

*** Confirm bank account number**

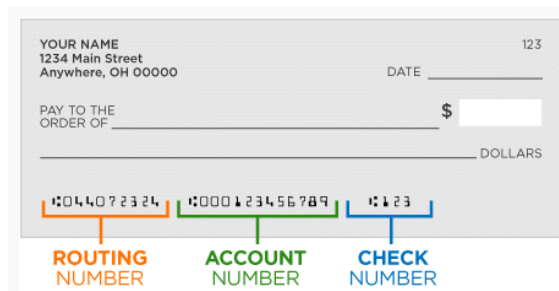
Bank account nickname ①

Maximum 17 characters

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

Cancel Save

**Your personal account number and your bank's routing number can be found at the bottom of your check.

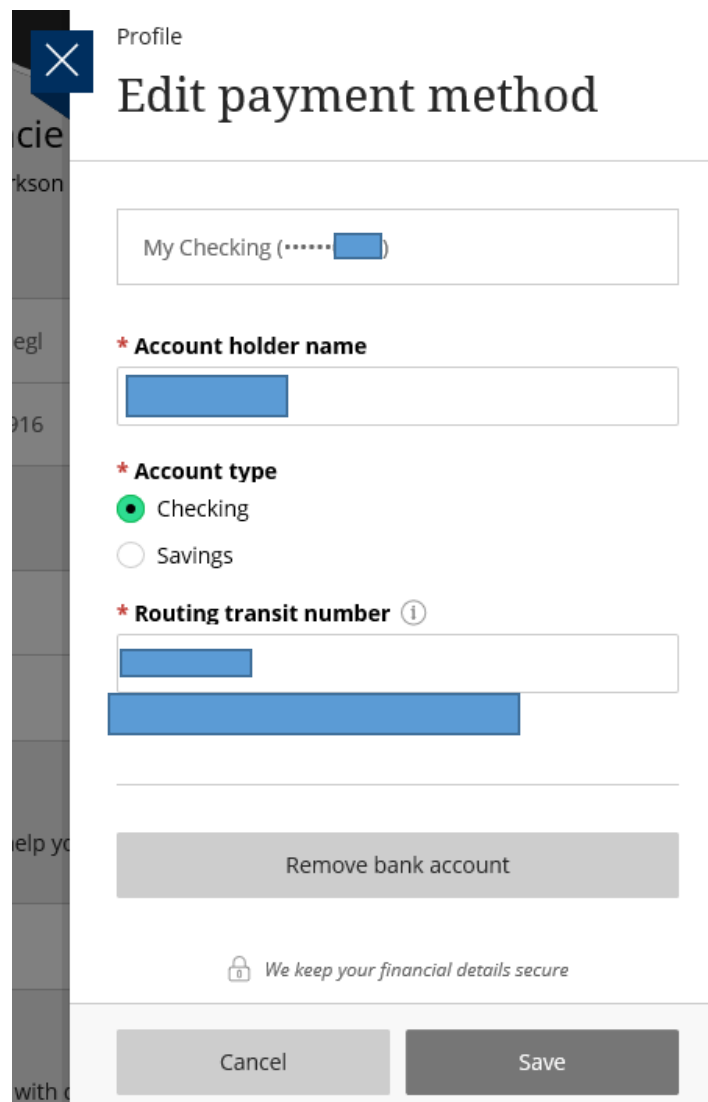


<https://smartasset.com/checking-account/how-to-find-your-routing-and-account-numbers-on-a-check>

To review saved payment methods, repeat steps 1 & 2. Click the pencil icon or edit across for the saved account.



Your saved account information will then appear. Make any necessary edits or remove the account by click "Remove bank account." **Be sure to save all changes.**



**Transact will also ask you during any payment if you would like to save the method for future use.