SELF SERVICE STUDENT FINANCE GUIDE

This guide will cover step by step instructions for using Self Service Student Finance for reviewing account activity, viewing the student statement, making online payments, setting up payment plans, setting up proxy access to pay on a student’s behalf, and sign up for text alert messages.

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SELF SERVICE STUDENT FINANCE GUIDE

WEB BROWSER SETTINGS ........................................................................................................... PG 3

AUTHORIZING PARENT PROXY USER .......................................................................................... PG 6

FIRST TIME LOGGING IN FOR PROXY USERS ........................................................................ PG 10

SETTING UP MY PROFILE (TOUCHNET) .................................................................................. PG 12

REVIEWING ACCOUNT ACTIVITY & VIEWING THE STUDENT STATEMENT ....................... PG 14

MAKING AN ONLINE PAYMENTS ............................................................................................. PG 16

PAYING BY CREDIT CARD ........................................................................................................ PG 17

PAYMENT BY ELECTRONIC CHECK (ACH) ............................................................................. PG 21

SETTING UP A PAYMENT PLAN ................................................................................................ PG 24

PAYMENT PLAN WITH CREDIT CARD ..................................................................................... PG 26

PAYMENT PLAN WITH ELECTRONIC CHECK (ACH) ........................................................... PG 28
WEB BROWSER SETTINGS

Google Chrome is the preferred web browser.

1. Allow pop-up windows.
   
   a. Click on three vertical dots on the far-right side of the browser window, this will open a menu of options, click Settings (third up from the bottom)

   ![Google Chrome Settings](image)

   b. On the Settings page, under Privacy and security, click Site Settings

   ![Site Settings](image)

   c. On the Site Settings menu, under Content, click on Pop-ups and redirects

   ![Pop-ups and redirects](image)
d. On the Pop-ups and redirects menu, Toggle the **Blocked (recommended)** button to the right, which will change pop-ups to **Allowed**

**Pop-ups Blocked:**

- Blocked (recommended)
- Block
  - No sites added
- Allow
  - Add

**Pop-ups Allowed:**

- Allowed
- Block
  - No sites added
- Allow
  - Add
2. To avoid clearing cache and cookies every time logging into Self Service, open a window incognito.

   a. Click on three vertical dots on the far-right side of the browser window, this will open a menu of options, click **New incognito window** (third option down). This will automatically open a new window.

   ![New Incognito Window](image)

b. Type the Self-Service link into the search bar:  [https://selfservice.quinnipiac.edu/student](https://selfservice.quinnipiac.edu/student)
PARENT PROXY INSTRUCTIONS

All students can grant their parent or authorized payer access to a proxy version of Self Service, which enables the proxy user to access academic and/or financial information for the student. As such, parents will have access to view account activity and student statements as well as make online payments and set up payment plans on behalf of the student. Additionally, by granting proxy access, Quinnipiac University will email both students and authorized proxy users regarding important billing information.

Directions to authorize a proxy user are below:

1. Students must log into Self Service with their QU Credentials
   https://selfservice.quinnipiac.edu/student

2. Select User Options from the menu and click View/Add Proxy Access
3. Use the drop down under **Select a Proxy** to choose a current relationship.

![Image of a proxy selection interface]

4. Select the type of access you wish to grant (Allow Complete Access will grant all or you can pick individual areas). **Please note:** In order to grant access to account activity, view a student statement, and make a payment, make sure that all boxes associated with Student Finance are checked. Check the **FERPA authorization box** and save. That individual will receive an email with username and password information.

![Image of proxy access options]

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**7**
5. Later, you can edit those with that already have access by clicking on the pencil on the left and editing access or removing access completely.

6. If you do not see the relationship that you want to in the drop-down list, you can choose to add one.

7. Fill out all required fields and any others that will help make the record unique.
If you do not see the relationship you want, please choose **Proxy User**. Fill out the rest of the form, authorize and save. This time you will be required to re-enter your password (the same you used to log in).

One of two things will happen. If the record is unique, that user will receive their username and password. If it is not unique (matches another record we have on file) our team will review that request and take appropriate action.

The access you granted is now ready and that individual can go to [https://selfservice.quinnipiac.edu/student](https://selfservice.quinnipiac.edu/student) and login with their credentials. Upon logging in they can select the individual they want to view and then go to the appropriate area to get the data they need.
FIRST TIME LOG IN FOR PROXY USERS

Once your student authorizes you for proxy access, you will receive 2 emails from Quinnipiac University; one with your user name *(beginning with PA)* and one with a temporary password.

1. Log into Self Service with your new username *(beginning with PA)* and temporary password that you received via email.
   
   https://selfservice.quinnipiac.edu/student

2. You will be prompted to set up a new password. *When entering your username, please be sure to include "@quinnipiac.edu" after your username.*

3. Once you set your new password, re-enter the password to log in:
4. Select your student’s name to proxy on their behalf.

5. Once logged into Self Service as a proxy user, you will see a green bar at the top of the screen. You will now be able to access your student’s information, based on the permissions granted to you by your student.

6. Click on Student Finance to see account activity, view a downloadable summary level statement, make an online payment, or sign up for a payment plan. (Instructions to follow.)

7. If making an online payment or setting up a payment plan for the first time, after clicking Continue to Payment Center, enter your email address (NOT your username) in the Create New User box. This is a one-time required step to authenticate your account.
SETTING UP MY PROFILE (TOUCHNET)

The first time you log in to make an online payment or set up a payment plan, you will be prompted to set up payment profile options. You can opt in for text alerts, set up two-step verification, and save your checking/savings account information for future payments. Changes to your profile can be made at any time, by clicking on the associated icon on the home page, under the My Profile Setup section.

1. **Personal Profile**: Verify your pre-populated name, email address, and opt in for text alerts. Fields are editable if changes are needed.

   ![Personal Profile Form]

   1. **Payment Profile**: You can save your checking or savings account number for future use.

      ![Payment Profile Form]
3. **Security Settings**: Set up two-set verification when logging in.

![Security Settings](image)

4. Click on the **Home** icon to make a payment or set up a payment plan. Additional instructions can be found in this manual.

![Home Icon](image)
REVIEWING ACCOUNT ACTIVITY & VIEWING THE STUDENT STATEMENT

You can review all student term charges, relating to tuition, fees, and housing by simply logging into Self Service Student Finance. The Student Statement will provide you with a printable summary-level snapshot of a term’s charges, payments, and financial aid as well as a current course schedule. If mailing a check payment to the University, please include the top portion of the Student Statement along with your check.

1. Log into Self Service with your QU Credentials
   https://selfservice.quinnipiac.edu/student

2. Click on Student Finance
   ![Student Finance Page](image)

   Here you can view your latest statement and make a payment online.
3. The Account Summary page will display the current overall balance due as well as any overdue balances and balances by term. To view account activity relating to a specific term, click on Account Activity. Alternatively, you can click directly on the term.

4. Select the desired term from the drop-down menu and click Expand All to view all term-based activity, such as charges, payments, and financial aid. Click View Statement to view a PDF downloadable version of the student’s account statement. The Student Statement will display only summary level activity. Detailed activity can be found by viewing Account Activity.
MAKING AN ONLINE PAYMENT

Students and authorized proxies can make single/full payments online, 24 hours a day, seven days a week. The available payment options include automatic bank payment (ACH) and credit card. Payments are recorded the day they are processed to ensure the most current Student Account balance in Self Service. (Please note, credit card payments are assessed a payment service fee of 2.85%.)

Important: Before you begin, make sure your browser allows for pop-up windows.

1. Follow Steps 1 through 3 of REVIEWING ACCOUNT ACTIVITY & VIEWING THE STUDENT STATEMENT (pages 14 – 15)

2. The Account Summary page will display the current overall balance due as well as any overdue balances and balances by term. Click on Make Online Payment.

3. Click Continue to Payment Center to begin securely processing your payment.
4. Click Make Payment

5. Select the term that you would like to pay and enter the desired dollar amount. Partial payments are allowed.

IF PAYING BY CREDIT CARD, FOLLOW STEP 6 THOUGH 11 BELOW

6. Select Credit Card by PayPath and click Continue.
7. Review your payment information and click **Continue to PayPath**.

8. A pop-up window will display with account information to review. **Please note, our payment processor charges a non-refundable payment service fee of 2.85% (or a minimum charge of $3.00.)**
9. Enter your credit card information and click **Continue**.

10. Review the payment details and click the check box to agree to the terms and conditions. **Click Submit Payment.**
11. Print your receipt for your records. You should also receive an email confirming your payment. Check your Junk Email folder if you do not receive a message in your Inbox. Credit card payments post real-time to the student accounts.

Thank you for using PayPath Payment Service!

A payment was processed and posted successfully to your Quinnipiac University account. Please print this page as your receipt and close this payment session. A confirmation email was sent to boomer.bobcat@quinnipiac.edu.

Your credit card statement will reflect two transactions with the following information:
- “PayPath Quinnipiac University” $4,000.00
- “PayPath Service Fee” $114.00

Receipt Information

- Payment to Quinnipiac University: $4,000.00
- PayPath Payment Service Fee: $114.00
- Total payment amount: $4,114.00

- School name: Quinnipiac University
- Student ID: [redacted]
- Payer name: Boomer Bobcat
- Billing address: Bobcat Way
- City: Hamden
- State: CT
- Zip code: 11111
- Email address: boomer.bobcat@quinnipiac.edu
- Phone number: 5555555555
- Card: Visa 1111
- Date and time: 2020-11-16 12:16:43 CST
- Browser Internet address: [redacted]
- Reference number: 20201116000013
- 21/SP: 000961025

The following terms will receive the corresponding credit:
- Term to credit
- Amount: $4,000.00

Quinnipiac University Contact Information

If you have any questions concerning this transaction, please contact Quinnipiac University at:
- Contact phone: 203.582.6850
- Contact email: bursar@quinnipiac.edu

Terms and Conditions

I hereby authorize charges totaling $4,114.00 via my credit/debit card. I understand that a PayPath Payment Service fee of $114.00 will be charged to my credit/debit card and is not refundable under any circumstances.
IF PAYING BY ELECTRONIC CHECK (ACH), FOLLOW STEP 12 THOUGH 16 BELOW

12. Select Electronic Check (checking/savings) and click Continue.

13. Enter the bank account information that you would like to use for this payment and click Continue.

Optional Note: You can save your banking information on file for future payments by naming your banking under the Option to Save section and checking Save this payment method for future use.
14. A pop-up window will display your ACH Payment Agreement. Review your agreement and if you agree, click I agree to the above terms and conditions and Continue.

15. Review your Account Payment and click Submit Payment.
16. Print your receipt for your records. You should also receive an email confirming your payment. Check your Junk Email folder if you do not receive a message in your inbox. ACH payments post real-time to the student accounts.
ENROLLING IN A PAYMENT PLAN

The university offers payment plans to help you meet your educational expenses. These plans are available for the fall and spring terms on a semester basis and offer up to five (5) monthly payments per semester. Payment plans are not available for January and summer terms. The payment plan is not a loan program. You have no debt; there are no interest or finance charges assessed, and there is no credit check. The cost to budget your interest-free monthly payment plan is a $75 nonrefundable enrollment fee per agreement. Please note, credit card payment plans are assessed a payment service fee of 2.85%.

To enroll in a payment plan follow the steps below:

1. Follow Steps 1 through 3 of REVIEWING ACCOUNT ACTIVITY & VIEWING THE STUDENT STATEMENT (pages 14 – 15)
2. Click on Make Online Payment

3. Click Continue to Payment Center to begin securely processing your payment
4. To set up a payment plan, click on **Enroll in a Payment Plan**

5. Select your desired payment plan term and click **Select**.

6. Click **Select** to begin setting up the plan.

7. Payment plans are now calculated by values that you enter into the **Eligible Charges and Credits** Worksheet. Term based charges and financial aid can both be found in Self Service Student Finance Account Activity. Be sure to include all expected Financial Aid (including pending outside scholarships) in the **Financial Aid** field. You can choose to make an optional down payment on this worksheet as well. Enrollment fees and down payments are processed immediately. Once complete, click **Update Schedule**.
8. Select the payment method you would like to use for all payment plan payments (and down payment, if applicable.) The payment method you select will be used for all monthly payments until your payment plan is paid in full.

**USING CREDIT CARD FOR PAYMENT PLANS (FOLLOW STEPS 9 THOUGH 14 BELOW)**

9. If paying by credit card, select **Credit Card via PayPath** and click **Continue**

10. Review the payment plan agreement that displays on your screen. Click the check box to agree to the terms and conditions. Click continue to proceed.

11. Credit cards are processed by PayPath, our credit card processor. Click continue to proceed to the processor.
12. Complete the payment form to authorize your credit card for scheduled payment plan payments.

13. Review the plan details and agree to the terms and conditions to proceed. Click Save.
14. You will receive a confirmation page once your payment plan set up is complete. Print a copy for your records. You will also receive an email outlining your payment plan payments. Check your Junk folder if you do not receive the email in your inbox.

**USING ELECTRONIC CHECKS (ACH) FOR PAYMENT PLANS (FOLLOW STEPS 15 THOUGH 20 BELOW)**

15. If paying by Electronic Check (checking or savings bank account), select **Electronic Check** and click **Continue**.

Payment Plan Enrollment

This plan requires scheduled payments.

- You must pay the plan fees before enrollment can be processed.
- All installments are paid automatically on their due dates. The payment method you choose will be used for all these payments.
- You are responsible for making sure that the payment method remains valid for the duration of the payment plan.

**Amount** $75.00

Method: Electronic Check (checking/savings)

*Credit card payments are handled through PayPath®, a tuition payment service.*

16. Enter the bank account information that you would like to use to schedule payment plan payments (and any down payment). You have the option to save your bank account information for future use.

Payment Plan Enrollment

The plan requires scheduled payments.

- You must pay the plan fees before enrollment can be processed.
- All installments are paid automatically on their due dates. The payment method you choose will be used for all these payments.
- You are responsible for making sure that the payment method remains valid for the duration of the payment plan.

**Amount** $75.00

Method: Electronic Check (checking/savings)

*Credit card payments are handled through PayPath®, a tuition payment service.*

**Account Information**

*Indicate required fields:

- You can use any personal checking or savings account. Do not enter other accounts, such as corporate account numbers, credit cards, home equity or payday checks. Do not enter debit card numbers. Instead, enter the complete routing number and bank account number as found on a personal check.
- *Account type:
  - Select account type
- *Routing number (Example):
  - Select account type
- *Bank account number:
  - Confirm account number:

**Billing Information**

- *Name on account:
- *Billing address:
- Billing address line 1/2:
- *City:
- *State:
- Select State
- *Postal Code:
- *Save payment method at (example: My Checking):

17. Review the payment plan agreement that displays on your screen. Click the check box to agree to the terms and conditions. Click continue to proceed.
18. Review the ACH Payment Agreement. Click to agree to the terms and conditions. Click Continue.

19. You will receive a confirmation page once your payment plan set up is complete. Print a copy for your records. You will also receive an email outlining your payment plan payments. Check your Junk folder if you do not receive the email in your inbox.

20. You can review future scheduled payments, by clicking on the Home icon at the top left of the page.