

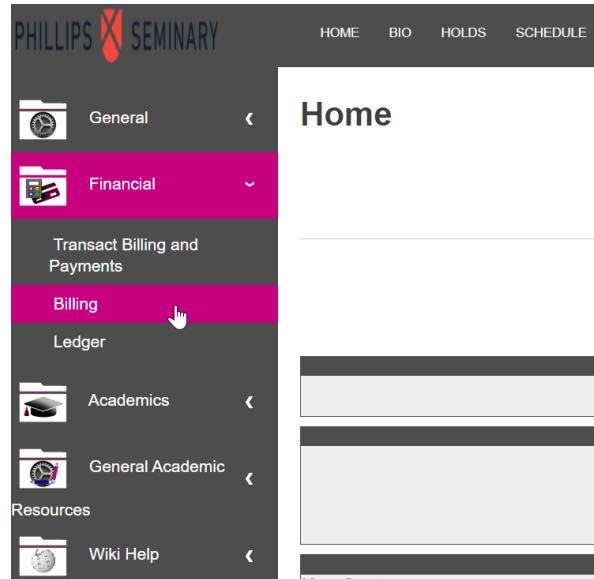
# Billing, Payments, and Refunds in the Student Portal

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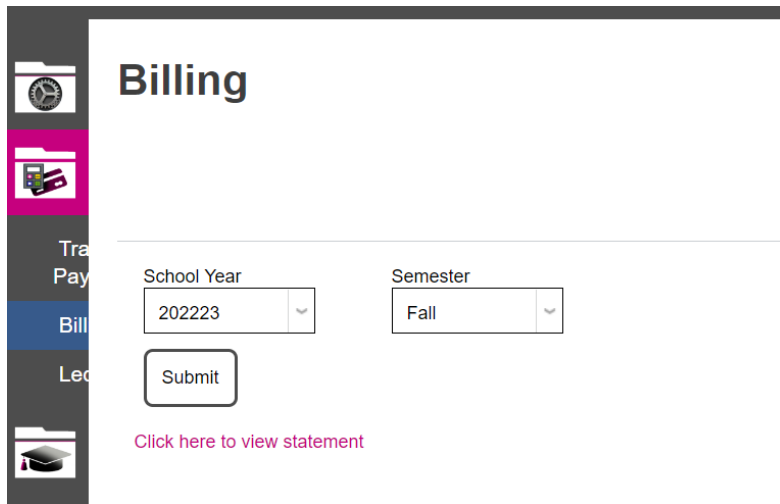
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# View your statement

1. On the left side of the Sonis student portal home page, click Financial, then Billing



2. Select the year and semester you want to view. The default setting is the current semester. If you change the year or semester, click Submit after. Then, click the pink text below the Submit button.



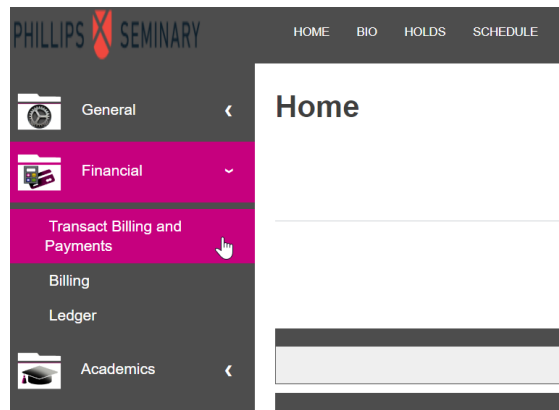
3. Your statement will generate and open in a new window.

Phillips Theological Seminary		
<b>Statement of Account</b>		
Fall 2022/23		
	Date:	11/07/2022
	Due Date:	12/30/1899
	ID:	BE3785362
	<b>Prior Balance:</b>	\$0.00
<b>Charges</b>		
General Student Fee	09/21/2022	\$125.00
Tuition for Theology and Practice of Public Worshi	09/21/2022	\$1,440.00
		<b>\$1,565.00</b>
<b>Payments/Adjustments/Credits</b>		
Masters Tuition Scholarship	09/21/2022	\$1,152.00
		<b>\$1,152.00</b>
	<b>Balance Due:</b>	<b>\$413.00</b>

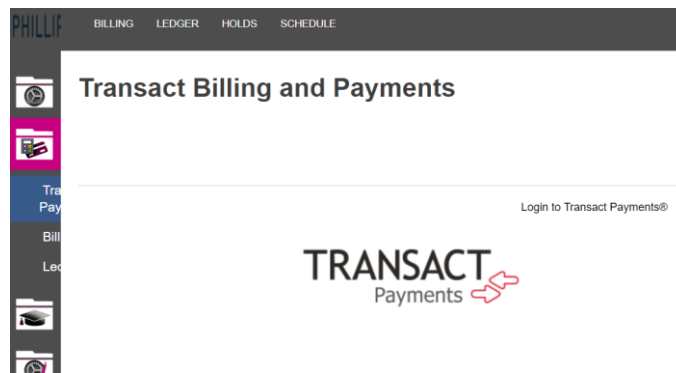
# Using the Transact Portal for Payments, Payment Plans, and More

Payments, payment plans, payer invitations, and eRefunds are located within the Transact Billing and Payments portion of the student portal.

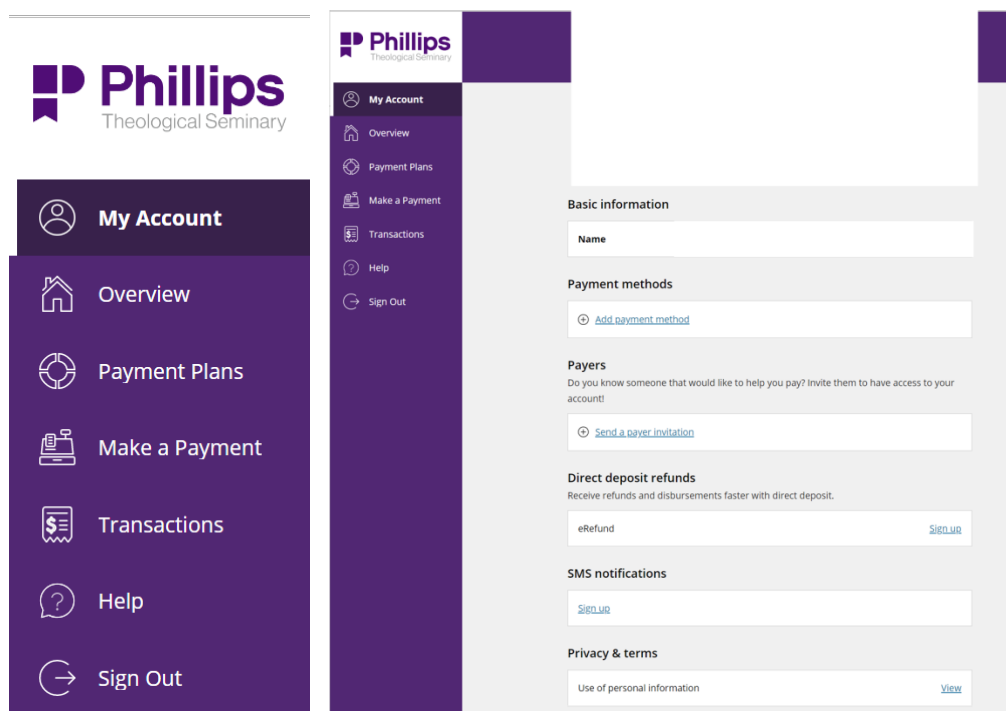
1. On the left side, click Financial, then Transact Billing and Payments



2. Click the middle of the Transact logo



3. From here, if you click on My Account, you will be able to add a payment method, invite a payer, sign up for eRefund, sign up for SMS notifications, and view privacy & terms.



## Make a payment

1. On the left side, click Make a Payment. From here you can check which semester you want to pay for and enter the amount you wish to pay. You can also add other items, such as degree change, graduation fee, etc.

Step 1 of 3: Pay amount

How much would you like to pay?

Balance items

Uncheck all | 1 of 1 selected

Description	Balance	Amount
<input checked="" type="checkbox"/> Fall 2022	\$275.32	\$275.32
Total balance		\$275.32
Pay amount		\$275.32
Remaining balance		\$0.00

Would you like to pay for something else?

### Available items

#### Degree Change Fee Payment

\$25.00

[View details](#)

#### Graduation Fee Payment

\$100.00

[View details](#)

#### Incomplete Fee Payment (Paid after Deadline)

\$40.00

[View details](#)

#### Incomplete Fee Payment (Paid by Deadline)

\$25.00

[View details](#)

#### Thesis Administrative Fee Payment

\$75.00

[View details](#)

2. Once you have added the payment amount and any other additional items, click Checkout

Payment 1 item

\$275.32

Cancel Checkout

3. On the next page, if you haven't already added a payment method, you will need to add one for this payment. You can choose to save the payment method for the future or enter it for each payment

**Phillips**  
Theological Seminary

## Make a Payment

My Account   Pay amount   Step 2 of 3: Payment method

Overview

Payment Plans

**Make a Payment**

Transactions

Help

Sign Out

How would you like to pay?

Payment amount  
\$1

\* Payment method

New credit or debit card

New bank account

International payment

Secure encrypted payment   Microsoft Teams (work or school)   Cancel   Continue

## Invite a payer

If you have another person or organization that wishes to pay on your account, you can invite them to be a payer.

On the Account page, click Send a payer invitation. This will bring up a window on the left. Enter the required information and click Send Invitation.

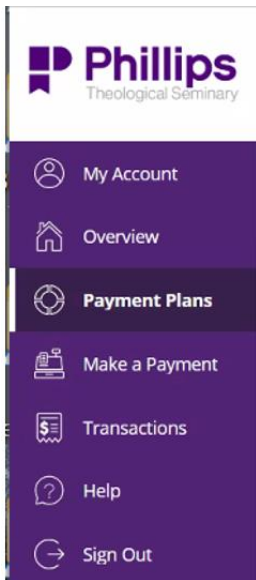
The screenshot displays the Phillips Theological Seminary account management interface. On the left is a dark purple sidebar with navigation options: My Account, Overview, Payment Plans, Make a Payment, Transactions, Help, and Sign Out. The main content area shows the 'My Account' page with sections for Basic information, Payment methods, Payers, Direct deposit refunds, SMS notifications, and Privacy & terms. A modal window titled 'Payer Invitation' is open on the right. It contains the following fields:

- Payer information**
  - \* First name:
  - \* Last name:
  - \* Email address:
  - \* Confirm email address:
- Message to payer**:   
Maximum 250 characters

At the bottom of the modal are two buttons: 'Cancel' and 'Send invitation'.

## Payment Plans

1. If you would like to split your balance up into equal payments over the course of the semester, you can set up an automatic payment plan. On the left of the Transact Billing and Payments portal, click Payment Plans, then click View payment plan options.



### Need to enroll in a payment plan?

Enrolling in a payment plan takes just a few minutes and can help you spread out payments on your education expenses.

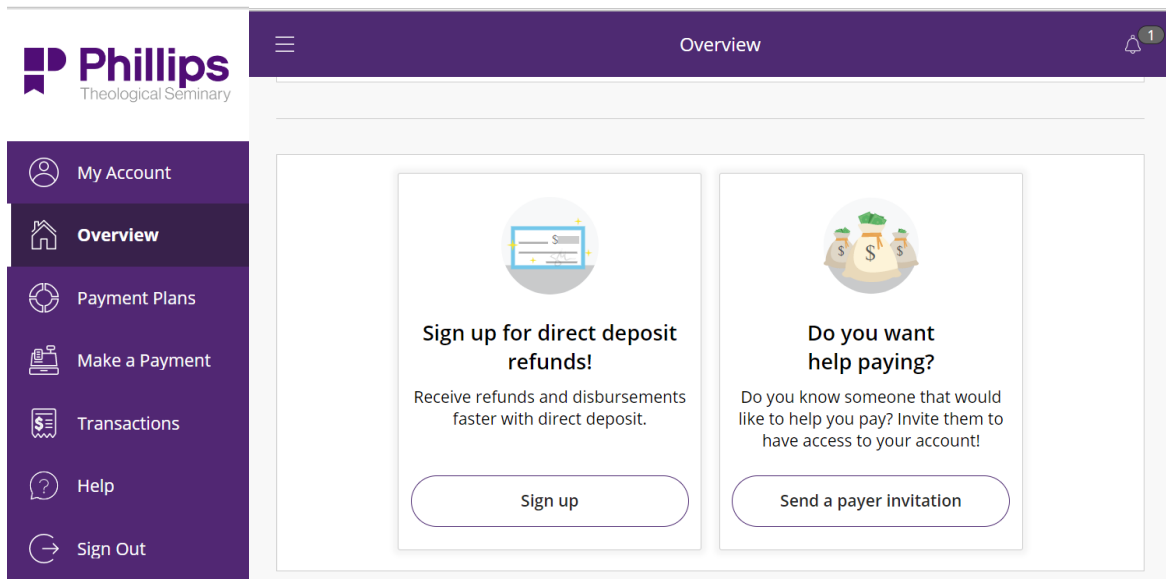
[View payment plan options](#)

2. This will bring up a window on the left. The window displays the payment plan options available. Depending on how far into the term the plan is initiated, the system will select a 2, 3, or 4 month payment plan. Payment plans are designed to have the account paid in full by the end of the term. You may only have one payment plan per term and payment plans are only for the current term.

A screenshot of a web application window titled "Payment Plans". The window shows details for a "Fall 2022 Payment Plan". A large blue circular graphic displays "\$275.32" with the text "Amount you can enroll in plan" below it. Below the graphic, it says "2 payments | No enrollment fee". A "Payment Schedule" section lists two payments: 1. \$137.66 due 11/10/22, and 2. \$137.66 due 12/10/22. At the bottom, there is a note: "Auto pay available: If you set up auto pay, all scheduled payments will occur on the payment plan due dates." At the very bottom, there are two buttons: "Cancel" and "Enroll in plan".

## E-Refund

1. The preferred method for credit refunds is through direct deposit. To sign up for this, click Overview, then scroll to the bottom and click Sign up for direct deposit refunds.



2. This will bring up a small screen with the refund agreement. Read through to the bottom, agree to the terms, and enter your initials before clicking continue.

The screenshot displays the 'Direct deposit refunds' agreement screen. At the top, it says 'My Account' and 'Direct deposit refunds'. Below this is a purple bar indicating 'Step 1 of 3: Agreement' with three numbered circles (1, 2, 3) showing the current step. The main text area contains the following information:  
responsibility for processing a replacement refund until the rejected funds are returned to the school.  
An eRefund email notification will be sent to my student email address when a refund has been processed and is in transit to my bank account.  
By enrolling in the Phillips Theological Seminary eRefund program, I acknowledge that I have read, understand and accept these terms and conditions.  
Below the text is a checkbox labeled 'I agree to these Terms & Conditions'.  
A red asterisk followed by the text '\* Please enter your initials as your eSignature' is above a text input field.  
Below the input field, it says 'Minimum 2 characters | Maximum 15 characters'.  
At the bottom, there is a lock icon and the text 'We keep your financial details secure'.  
At the very bottom, there are two buttons: 'Cancel' and 'Continue'.



3. On the next screen, enter your bank information for the account that you want your refund deposited into.

My Account

# Direct deposit refunds

Step 2 of 3: Bank account

Agreement ✓ 2 3

### Your bank account information

**\* Payment method**

New bank account

**i Important:** Refunds can only be deposited into personal checking or savings accounts. Corporate accounts are not allowed.

**\* Account holder name**

**\* Account type**

Checking

Savings

**\* Routing transit number** ⓘ

**\* Bank account number** ⓘ

**\* Confirm bank account number**

**Bank account nickname** ⓘ

My bank account

Maximum 17 characters

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

Cancel Continue

## Contact for Questions or Issues

If you have any questions regarding these instructions, please either send an email to [bursar@ptstulsa.edu](mailto:bursar@ptstulsa.edu) or contact the one of the following people:

Michelle Harper  
Bursar and Financial Accountant  
(918) 270-6468

Tammye Jurena  
Executive Assistant to the Business Office  
(918) 270-6406