## Table of Contents

- Logon Page: .................................................................................................................. 3
- Home Page Overview: .................................................................................................... 4
- Functional Tab Bar: ......................................................................................................... 6
  - Payments Tab: ............................................................................................................... 6
  - eStatements: ................................................................................................................ 9
  - Account Activity: ......................................................................................................... 10
  - Personal Profile: ......................................................................................................... 11
  - Payment Methods: ...................................................................................................... 12
  - Authorized Users: ...................................................................................................... 12
- Appendix A – Authorized User Logon: ......................................................................... 14
The logon page for Penn.Pay can be found on the Student Portal, Penn InTouch and on the Student Registration and Financial Services page. The student will enter his/her PennKey and Password and click on Log in.¹

¹ Authorized Users will have a different logon page, please see Appendix A
1) Logon area – displays important information & reminders about your account
   a. Identifies student
   b. Provides a link to Billing and Payment information at
      http://www.sfs.upenn.edu/billing/index.htm
   c. Send emails sfsmail@exchange.upenn.edu about any issues you may experience.
   d. Log Out
2) Functional tab bar
   a. My Account takes you to the home page (landing page)
b. **Payments** allows you to Make a Payment and view account detail

c. **eStatements** allows you to view your most current statement, make a payment, review all activity since your last statement, and view all activity

d. **Account Activity** allows customers to look at all billing, payment, and financial aid detail by term

e. **Personal Profile** displays your PennKey number, your full name, the email address you have on record, as well as allowing you to set an alternate email address. Finally, you may choose to receive cellular text messages.²

f. **Payment Methods** allow you to predefine a mechanism for payment, (checking/saving only). Additionally, you may edit or delete previously defined Payment Methods in this area. You may also define a payment method while making a payment.

g. **Authorized Users**, this page allows you to define, review, edit and delete any authorized users. These authorized users, at your discretion, can view your billing statement and account activity and/or view your payment history and account activity.³

3) **Account Alerts and Announcements** – displays any alerts or announcements and welcomes you to the Penn.Pay software module.

4) **My Account Block** displays an account summary, including estimated financial aid, and provides quick links to Make a Payment, View Account Activity and displays information regarding your statement.

---
² Charges may apply
³ You may also view/print the agreement you made with University of Pennsylvania granting account access.
1. Current Account Status displays your account summary
   a. Clicking on any of the hyperlinks such as Balance will take you to a detailed view of your account.
   b. Clicking on View Account Activity will also will take you to a detailed view of your account.

2. Pending payments display any payments you have scheduled for the future as noted below; you may, up until the payment date, edit the Payment Date & the Amount, but not the Payment Method. Additionally, you may delete the Pending Payment.

3. Selecting the Make a Payment option, begins a wizard which will guide you through the process. The four steps are; Amount Due, Payment Method, Confirmation & Payment Receipt.
   a. As illustrated below, the Amount Due form allows you to edit the amount you are paying (versus the Amount Due), and select a Payment date, note that today’s date will be in default; if you want to schedule a future
payment, edit the Payment date field. Click on Continue to proceed.

b. Payment Method allows you to select either a checking or savings account, a predefined method of payment or a credit card.4
   i. Select a method from the drop box
   ii. If you select a previously defined profile (in this example Ben’s Bucks), you'll be taken to the confirmation page.
   iii. If you select checking or saving, you'll need the routing number, your account number, name on the account and other information. At the end of the form you'll see an Option to Save, if you plan on using this payment method in the future, select the check box and name it, you'll be able to select it then for future use. Click on continue to proceed. You'll be taken to a Confirmation page where you can

---

4 American Express, Master Card, and Discover are accepted. A non-refundable service fee of 2.75% will be charged for the use of any card.
review the details of the transaction, Submit Payment to complete the transaction, select Back to modify or select Cancel to cancel out of Payments.

iv. If you are going to pay by credit card, you’ll have an opportunity to review your transaction. If you decide to continue then you’ll be taken to a 3rd party site for card processing. Selecting Continue to PayPath will open a new browser window.

v. You’ll again have the opportunity to review the transaction and receive notice of the non-refundable service fee. You may Cancel or Continue.

vi. You’ll be required to complete the credit card form, including name on card, account number, & security code. Additionally, you’ll be required to provide your billing address, along with an email address and telephone number. If the billing address is outside of the United States, you'll only be asked to provide an email address and telephone number. Once you continue you'll be taken to a confirmation page which will display the payment being made to Penn, the non-refundable Service Fee, and the total amount billed to your credit card. You’ll have to agree to the Terms and Conditions before you can submit the payment.
vii. Regardless of how you pay, at the end of the process you'll receive a receipt, please retain it for your records.

**eStatements**
In this functional area, you'll have the opportunity to review, and print past and current statements.

Additionally, you can print a hard copy bill (and Remittance Slips) for others that may make payments to your student account that do not have computer access or access to your account or require that you do so, such as an employer.

Select the statement you wish to view/print, from the drop down box and choose Select. Note the advisories regarding “pop-up blockers”. The statement and remittance slip will open in another browser window.

Your statement will open in a new tab. To print simply use your browser’s print control or click on Ctrl P.

If using the remittance slip, be sure to make check payable to the trustees of the University of Pennsylvania. On your payment check, please print the student’s full name and 8-digit PennID#. Please mail payments to

**University of Pennsylvania/Tuition**
P.O. Box 785551
Philadelphia, PA 19178-5551
Account Activity

Account activity gives you a detailed view of all your account transactions, including Estimated (pending) financial aid. The default view when first landing on the page is to see “All” activity, however by selecting the drop down box at the View transaction by term field you will be able to filter by term. Be sure to click on “Select” after choosing the desired term.
In the Account Activity pane you’ll see a detailed view of all the transactions in the term you’ve selected. Note that the columns headers can be sorted by clicking on them.

<table>
<thead>
<tr>
<th>Description</th>
<th>Code</th>
<th>Date</th>
<th>Amount ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>3rd Party Payment Received</td>
<td>SC03</td>
<td>30-OCT-2013</td>
<td>$29,167.00</td>
</tr>
<tr>
<td>Acceptance Fee Payment</td>
<td>0100</td>
<td>01-JUL-2013</td>
<td>-400.00</td>
</tr>
<tr>
<td>Clinical Fee</td>
<td>HF01</td>
<td>02-DEC-2013</td>
<td>$242.00</td>
</tr>
<tr>
<td>Clinical Fee</td>
<td>HF01</td>
<td>06-NOV-2015</td>
<td>$257.00</td>
</tr>
</tbody>
</table>

**Personal Profile**
This functional area contains two sections: Personal Profile and Communications. In Personal Profile you’ll have an opportunity to review your university credentials, and add an alternate email address. Remember; if you find your credentials are incorrect please manage changes through the Registrar’s office or via the Penn Directory. Additionally, you may add the ability to receive text messages⁵. To add test messaging, click on the triangle to the left of Communication. Remember to save changes.

---

⁵ Charges from your carrier may apply
Payment Methods
This functional area allows you to review existing Payment Methods, delete or edit them. Editing is limited to billing information, account information may not be edited.

Authorized Users
This area allows you to define those individuals who may make payments on your behalf. At your sole discretion you may grant or deny access to view billing statements, account activity and or payment history. Once defined you may edit those rights, or delete previously added users.

If you select continue you will need to accept the Add Authorized User agreement. You may, print, continue or cancel.
You may review your authorized users and edit or delete them as necessary. Editing is limited to changing some access rights. There is no practical limit to the number of authorized users you may add to your account. Authorized users who are deleted will receive an email notifying them of the changes in their status.
Appendix A – Authorized User Logon

If you’ve been designated as an Authorized User, there are a few differences in your Penn.Pay experience versus those of a student.

Most importantly you will have to be invited before you’ll be able to logon. Once invited, you’ll receive two emails from srfsdnr@exchange.upenn.edu. Do not respond to the email address, it is from an unmonitored location.

The first email you receive, which is illustrated below, lets you know you’ve been invited, gives you your user name and shares the website address with you.

From: srfsdnr@exchange.upenn.edu [mailto:srfsdnr@exchange.upenn.edu]
Sent: Wednesday, March 30, 2016 4:06 PM
To: Franklin, Ben
Subject: You have been given access

This is an automated message to inform you that the student listed below has granted you access to his or her online billing information. You now have the ability to make payments on behalf of this student, schedule or automate future payments and more.

https://test.secure.touchnet.net:8443/C21690Test_tsa/web/index.jsp

======== ACCESS INFORMATION ========
Student Name --- [ UPenn Student ]
Username --- [ bfranklin@upenn.edu ]

Thank you

The second that you’ll receive, contains your temporary password.

From: srfsdnr@exchange.upenn.edu [mailto:srfsdnr@exchange.upenn.edu]
Sent: Wednesday, March 30, 2016 4:06 PM
To: Franklin, Ben
Subject: Your access information

This is an automated message to inform you that the student listed below has granted you access to his or her online billing information. You now have the ability to make payments, schedule or automate future payments, and more. For your first login, you will use the password shown below. For security, your username for this account is sent in a separate message.

======== ACCESS INFORMATION ========
Student Name --- [ UPenn Student ]
Password --- [ XXXXXXXXXX ]

Thank you
You'll log on differently from the student. The student users his or her PennKey credentials to navigate to Penn.Pay through a university portal; you'll use the web address provided to you and use your own credentials. If you forget your password, you may have a new password sent to you by clicking on “Forgot your password?”

You may want to update your Personal Profile, select it from the menu bar. Enter your first and last name. You may also add an alternate email address. Additionally, you may change your primary email address (note that if you do so then that address will become your user name), and change your password. Be sure and save your changes.

Finally, if you wish to receive notifications via text messaging, be sure to select the Communication button, fill your phone number NNN-NNN-NNNN.
If you have one or more students at Penn, you'll have the option of selecting the student whose account you wish to make a payment for, or you can opt to select all students and make a payment for all of them at the same time. To select one, click on the student's name, to select all, click on Pay All.

For other information about payments, & payment methods, please review the relevant sections of this guide.