How to Enroll in a Monthly Payment Plan

Overview

Students currently enrolled at SCU are eligible to enroll in a monthly payment plan to assist with budgeting needs, on a term basis. **There is a $40 non-refundable enrollment fee** per term/semester.

Payment Plan Criteria:

- Student must be enrolled at SCU.
- First payment and payment plan enrollment fee are due when you enroll into the plan.
- Total payment plan amount will be based on current account balance minus applicable financial aid.
- Enrolling in the payment plan requires a checking/savings account, and are processed via ACH.
- Plans are subject to automatic rebalancing on the 5th of each month based on enrollment and/or financial aid changes. This means your monthly payment amount may change accordingly, and you will receive email communication notify you of any such changes.
- Participants must enroll into a new payment plan each term. There is no automatic re-enrollment.

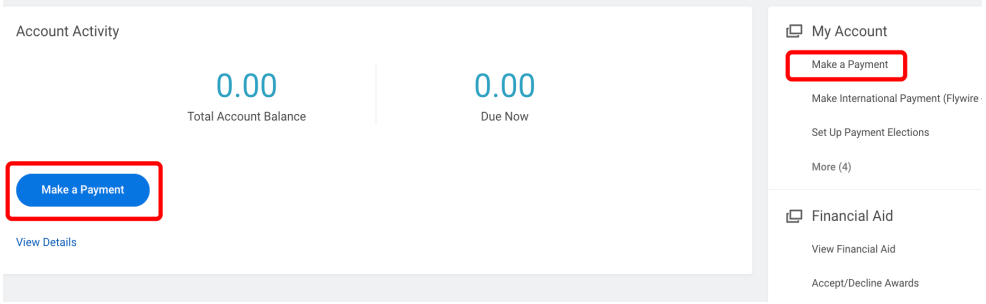
This quick reference guide will cover how to navigate through Workday to external systems to **Set up a Payment Plan for the Term.**

Process

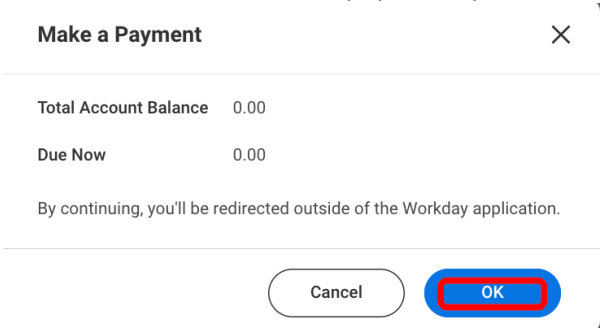
1. After logging into Workday, click the **Finances** icon on your home page.

The **Finances** dashboard provides quick links to your Account Activity, Make a Payment, **Setup Monthly Payment Plan**, Payment Elections, 1098T information and Financial Aid.

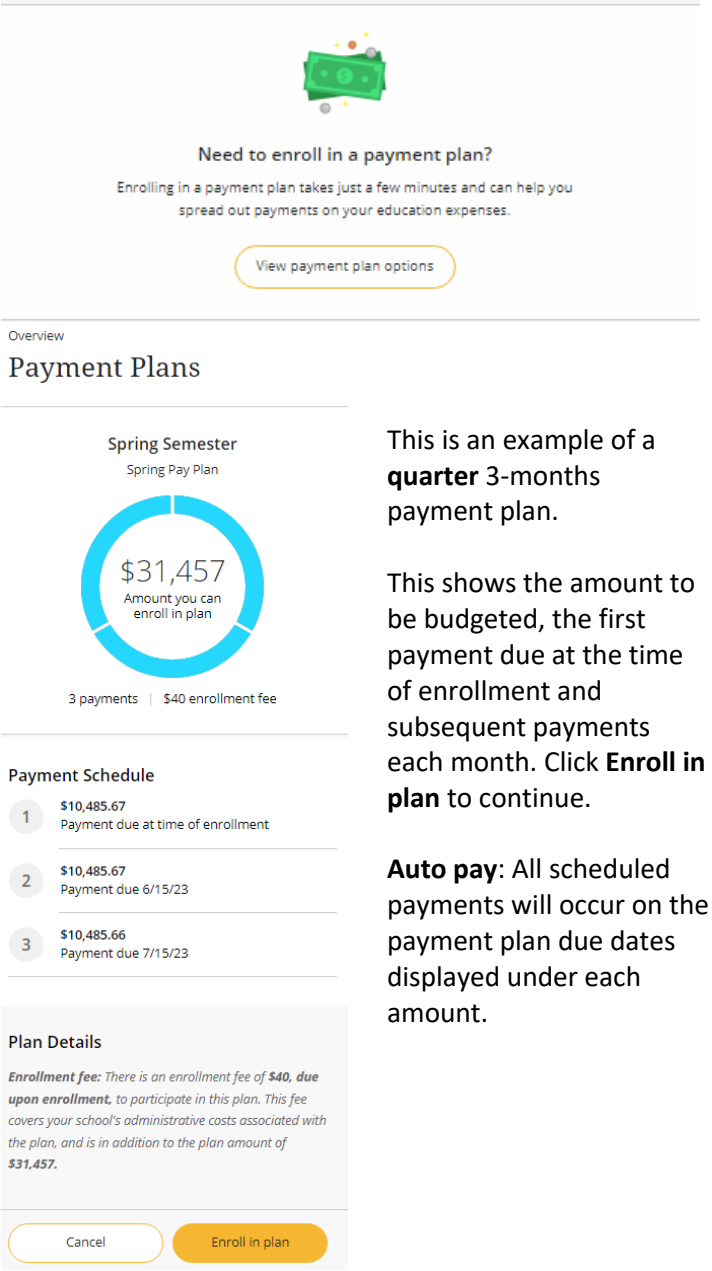
2. Click **Make a Payment**.



3. Click **OK** to be transferred to Transact, our payment system.



4. Select **Overview** or **Payment plans** on the left-hand menu. Click **View payment plan options** in the payment plans box.

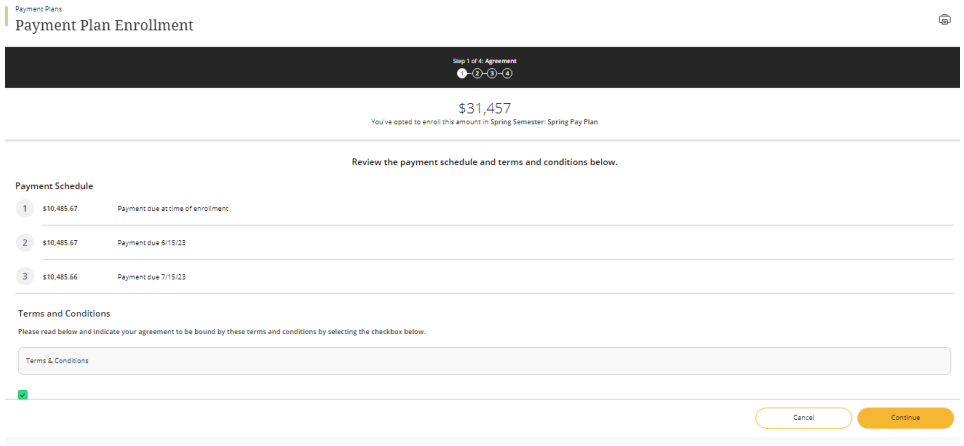


This is an example of a **quarter** 3-months payment plan.

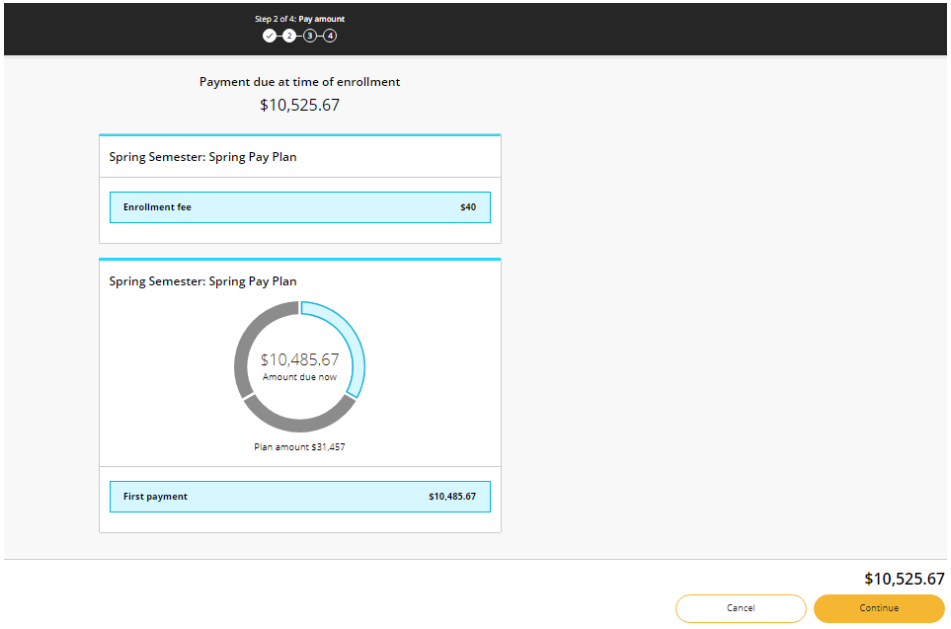
This shows the amount to be budgeted, the first payment due at the time of enrollment and subsequent payments each month. Click **Enroll in plan** to continue.

Auto pay: All scheduled payments will occur on the payment plan due dates displayed under each amount.

5. Review **Terms and Conditions**. Check the box to agree and click Continue



6. Payment Plan Enrollment: The $40 enrollment fee is included on this page and is added to the total due for the first payment. Click **Continue.**



7. If you haven't setup your payment method with your checking or savings account information, you'll need provide your bank account information now.

How would you like to pay?

Payment amount

$10,525.67

* Payment method

New bank account

Important: Payments can be made from personal checking or savings accounts only. Corporate accounts are not allowed.

* Account holder name

Santa Clara University

* Account type

Checking

Savings

* Routing transit number

[redacted]

* Bank account number

* Confirm bank account number

Save bank account for future use

Bank account nickname

SCUBronco

Maximum 17 characters

This site is protected by reCAPTCHA and the Google Privacy Policy and Terms of Service apply.

Cancel Continue

If you already have existing banking information entered, it will be displayed here for you to select.

There will be an automatic deduction for the next payment plan payments. An email reminder will be sent the 5th of each month.

Click **Continue** once you have selected or entered your payment method.

8. Confirm your bank information, then click **Pay.** Note: Please be aware of time outs on the student system and the Payment site. This could affect the Payment site entries.

Last step! Let's make sure we have your correct information.

Email address	[redacted]

All notifications regarding this payment plan will be sent to the email address(es) saved in your profile.

Summary

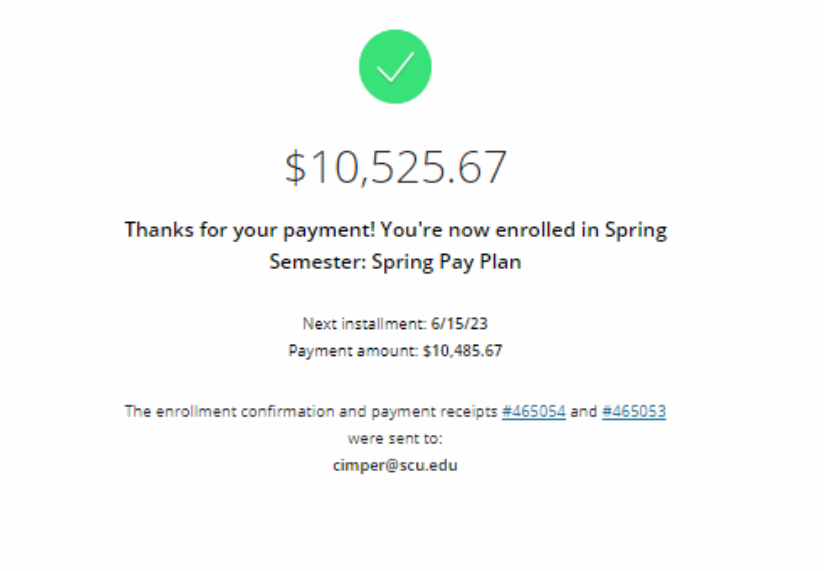
Spring Semester: Spring Pay Plan	
Enrollment fee	$40.00
First payment	$10,485.67
Total	$10,525.67

Payment details Change

Account holder name	Santa Clara University
Account type	Checking
Routing transit number	[redacted]
Bank account number	[redacted]
Bank	BANK OF AMERICA, [redacted]

This site is protected by reCAPTCHA and the Google Privacy Policy and Terms of Service apply.

Cancel Pay $10,525.67



The email address from the Review page will receive 3 emails:

1) A thank you for the first payment.
2) A thank you for the $40 enrollment fee payment.
3) You will also receive an email with your next installment due dates and amounts.

The payment plan enrollment process is now complete and you can close the pop-up window.

If you have any questions, please contact the Bursar's Office at 408-554-4424, or by email at bursarpayplan@scu.edu.