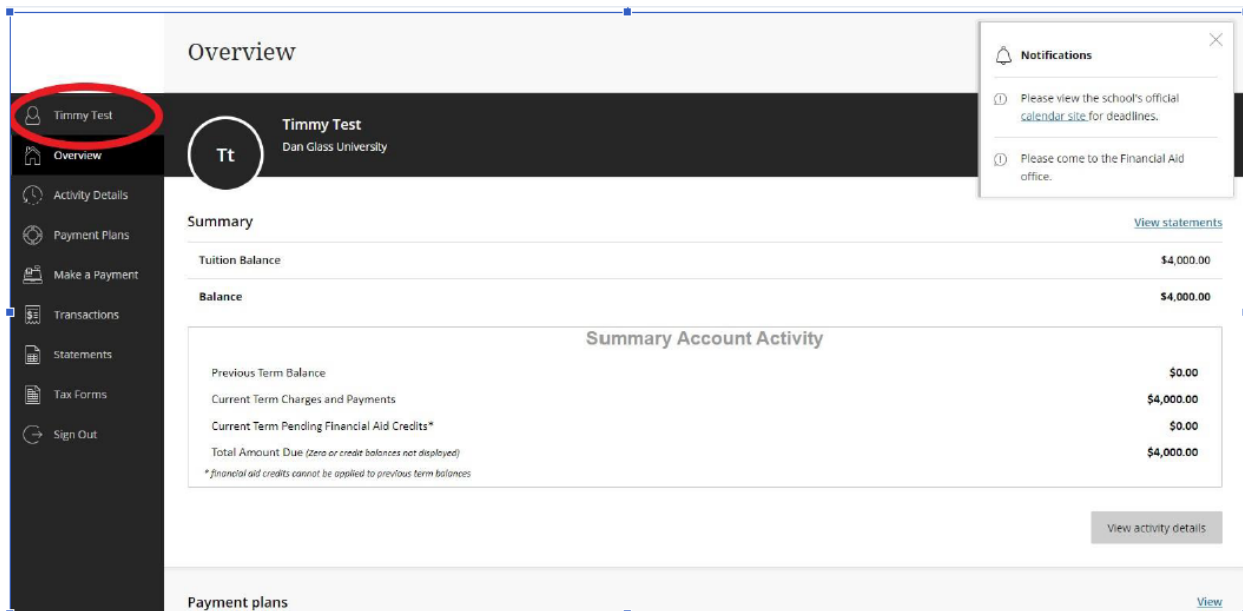


Guide to Creating a UChicago Authorized Payer Portal

- 1) Login to [my.UChicago](https://my.uchicago.edu): Go to Finances – myAccount – EBill/EPay
- 2) Select the Link that is your name. It will be the the first link on the navigation menu, on the left side of the website.
- 3) The link will open your profile page. Under the Payers heading you will select the link, “Send a payer invitation.”



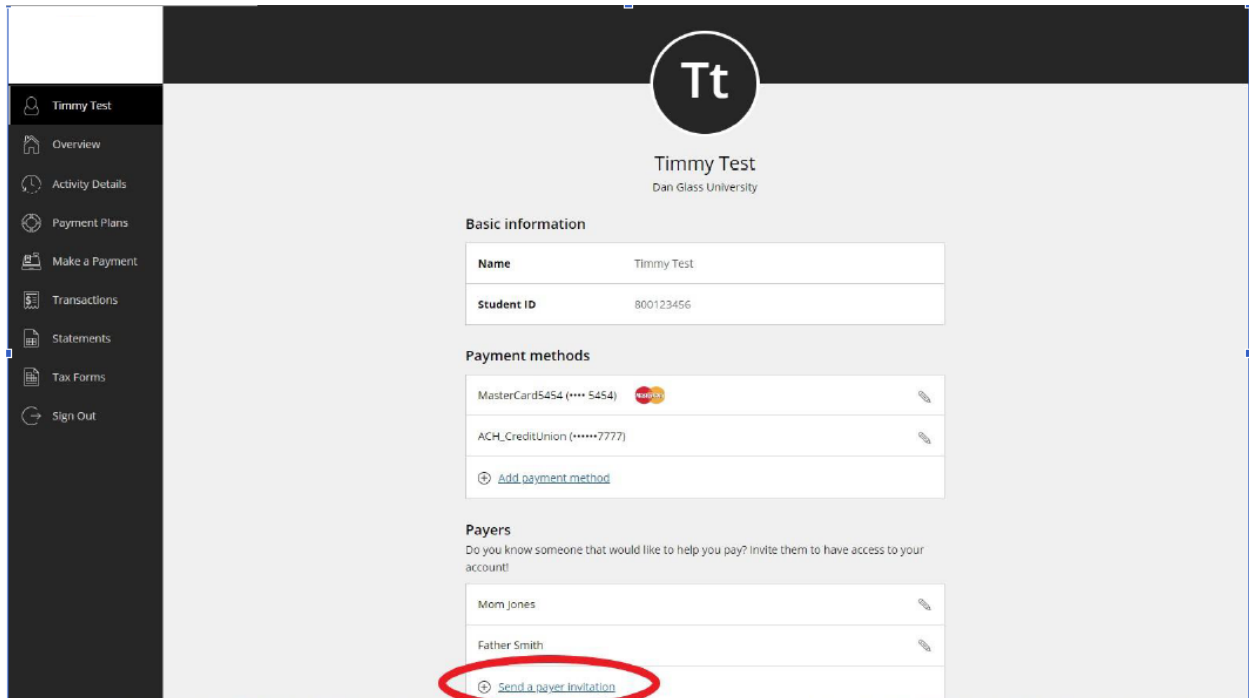
The screenshot displays the 'Overview' page for a user named Timmy Test at Dan Glass University. The navigation menu on the left includes: Overview (highlighted with a red circle), Activity Details, Payment Plans, Make a Payment, Transactions, Statements, Tax Forms, and Sign Out. The main content area shows a 'Summary' section with a 'Tuition Balance' of \$4,000.00 and a 'Balance' of \$4,000.00. Below this is a 'Summary Account Activity' table.

Summary Account Activity	
Previous Term Balance	\$0.00
Current Term Charges and Payments	\$4,000.00
Current Term Pending Financial Aid Credits*	\$0.00
Total Amount Due (Zero or credit balances not displayed)	\$4,000.00

*Financial aid credits cannot be applied to previous term balances

Buttons for 'View statements', 'View activity details', and 'View' are visible.

link will open your profile page. Under the Payers heading you will select the link, “Send a payer invitation”.



- 4) The link will open the Payer Invitation window, which includes the required form fields that must be completed for the payer you would like to add to your account which include: FirstName, Last Name, Email address, and Confirm email address.
- 5) After completing the form fields, under the Payer access heading there will be two check-boxes that are automatically selected for you, "Allow access to statements", and "Allow Access to tax forms," you can change those options if you would like.
- 6) The last form field is optional, Message to payer, which allows you to include a message in the email invitation to the payer. After you have completed all the required fields you will select the Send Invitation button.

The screenshot shows a user profile page for 'Timmy Test' at 'Dan Glass University'. A 'Payer Invitation' modal is open on the right side. The modal contains the following sections:

- Payer information:**
 - * First name:
 - * Last name:
 - * Email address:
 - * Confirm email address:
- Payer access:**
 - Allow access to statements
 - Allow access to tax forms
- Message to payer:**
Maximum 250 characters
- Buttons: and (highlighted with a red circle).

The background profile page shows:

- Basic information:**
 - Name: Timmy Test
 - Student ID: 800123456
- Payment methods:**
 - MasterCard5454 (**** 5454)
 - ACH_CreditUnion (*****7777)
 - [Add payment method](#)
- Payers:**
 - Do you know someone that would like to help you pay? Invite them to have access to your account!
 - Mom Jones
 - Father Smith
 - [Send a payer invitation](#)

- 7) When the email invitation has been successfully sent to the payer, a new confirmation window will open. From there you have the option to select the Invite another payer button or select the Close button to return to your profile page.



Profile

Payer Invitation



**Success! An invitation has been sent to
Test Test**

Access your profile page to edit existing payers or
invite new payers.

Invite another payer

Close