

TRANSACTION ONLINE STATEMENT AND PAYMENT INFORMATION

To make a payment online using Transact: Students and parents will navigate differently to the Online Payment Site.

STUDENTS: On the access.caltech.edu website, select the “**Bursar Billing and Payment (Transact)**” link.

PARENTS AND OTHER DESIGNATED PAYERS: Students must first “**Add New**” payer. (See page 2 of instructions.) The payer may then use the following URL to get to the Transact site directly: [Authorized Payers Transact Link](#).

Once you have reached the Online Payment Site, the process is the same for all who are authorized to make payments.

- Select the “**Make Payment**” link found at the left side of the Transact home page.
- Select “**Your Current Balance**” to pay the current balance if you wanted to pay a different amount you can click on the drop box and select “**Other Amount**” and enter the amount you want to pay.
- Validate that the amount is correct and select “**Checkout**”.
- Select “**Payment method**” and complete the information on the form. You will want an actual check in front of you to reference the bank account number and routing number. (Reference check example below)
- Click “**Agree**” for the Bank account terms and conditions and then click “**Continue**”.
- Click that you have read and accepted the service charge of \$0.50 and then click “**Continue**”.
- Validate your information and click “**Pay**.”
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You will need the following information to complete your online payment:

- Account type (Checking or Savings)
- Checking or Savings Account Number (Account number in example below)
- The Bank Routing Transit Number (Routing number in example below)
- The Account Holder’s name (first and last)

THOMAS B. ANDERSON
MARY ANDERSON
123 Mt. Pleasant Rd.
Anytown, USA 12345

1001

DATE

SAMPLE

BAY TO THE ORDER OF

\$

DOLLARS

UNION BANK OF CALIFORNIA

MEMO

⑆ 21000497⑆ ⑆ 234567890⑆ ⑆ 100⑆

1. Routing Number 2. Account Number 3. Check Number

To add parents and other designated payers as users of Transact:

Adding a parent or other designated payer as a user of a Transact account allows the user to receive monthly statements and to make online payments. For the student to add an authorized user, they must log into Transact and follow the steps listed below:

- Select **“My Account.”**
- Scroll down to Payers and select **“Send a payer invitation.”**
- Complete the online form by filing in the newly authorized **user’s name** and **e-mail address.**
- Select the permission **“Allow Access to statements.”**
- Select **“Send invitation.”**
- An e-mail notification will automatically be sent to the new payer with their temporary password, login ID and a link to the Transact log in site.

To reset a parent’s or other designated payer’s password:

The student must reset a parent’s or third-party payer’s password by logging into Transact through access.caltech.edu.

- Select **“My Account.”**
- Scroll down to Payers and click on the pencil next to the payers’ name.
- Scroll to the bottom and select **“Resend payer invitation”** this will send an email to the payer and reset the password.

If you need further assistance, please contact the Bursar’s Office at:

Bursar's Office
626-395-2988 Tel
626-304-0883 Fax
BursarDocuments@caltech.edu
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Pasadena CA 91125-0001