



Access to your student's information is located on the Self Service Portal. Please use the Student Administrative Services QR Code to access the Self-Service portal or visit [www.loyola.edu/selfservice](http://www.loyola.edu/selfservice).

After logging in to Self Service, you will see a list of the people whose information you have access to, including yourself.

Person Proxy

Welcome to Colleague Self-Service! Select the person's account you want to view:

Not Pictured [Redacted Name] You

[Profile Picture] [Redacted Name]

Cancel Continue

Click on the box with the student's name and then click on Continue.

On the next page, you will see your student's name is now in the username field where yours was. There is also a new box at the top of the screen showing that you are acting on behalf of your student.

LOYOLA UNIVERSITY MARYLAND

acting on behalf of [Redacted Name] Change User

Hello, Welcome to Colleague Self-Service!

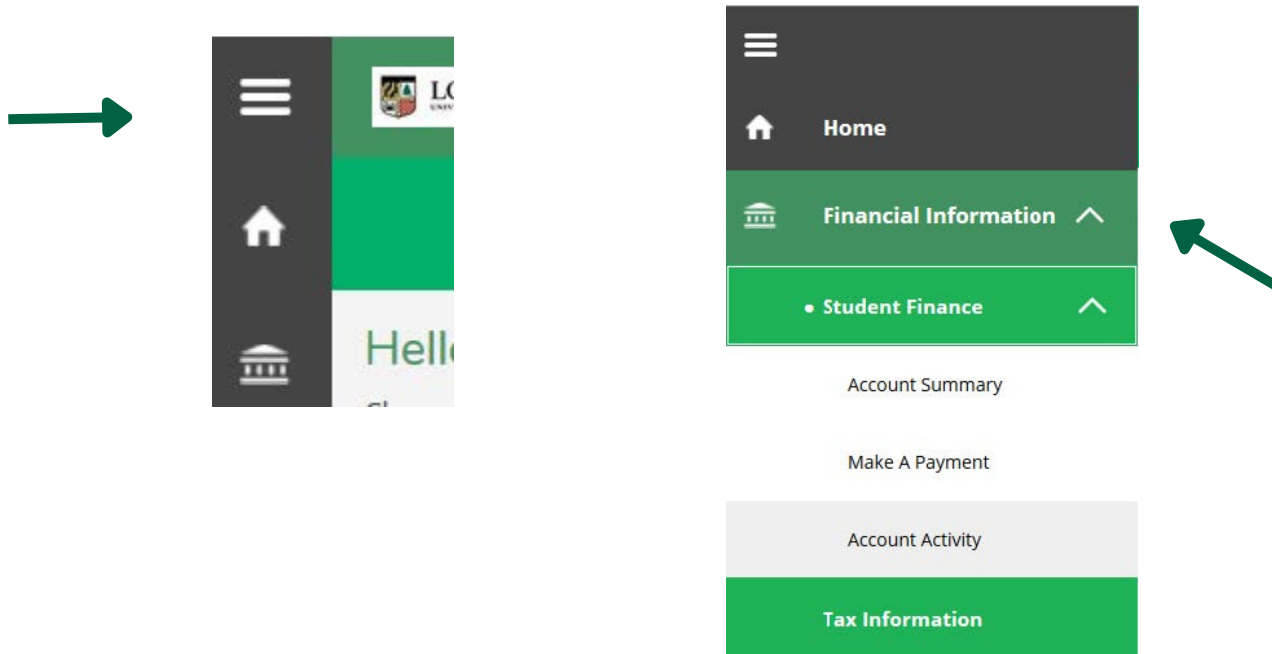
Choose a category to get started.

**Student Finance**  
Here you can view your latest statement and make a payment online.

**Tax Information**  
Here you can change your consent for e-delivery of tax information.

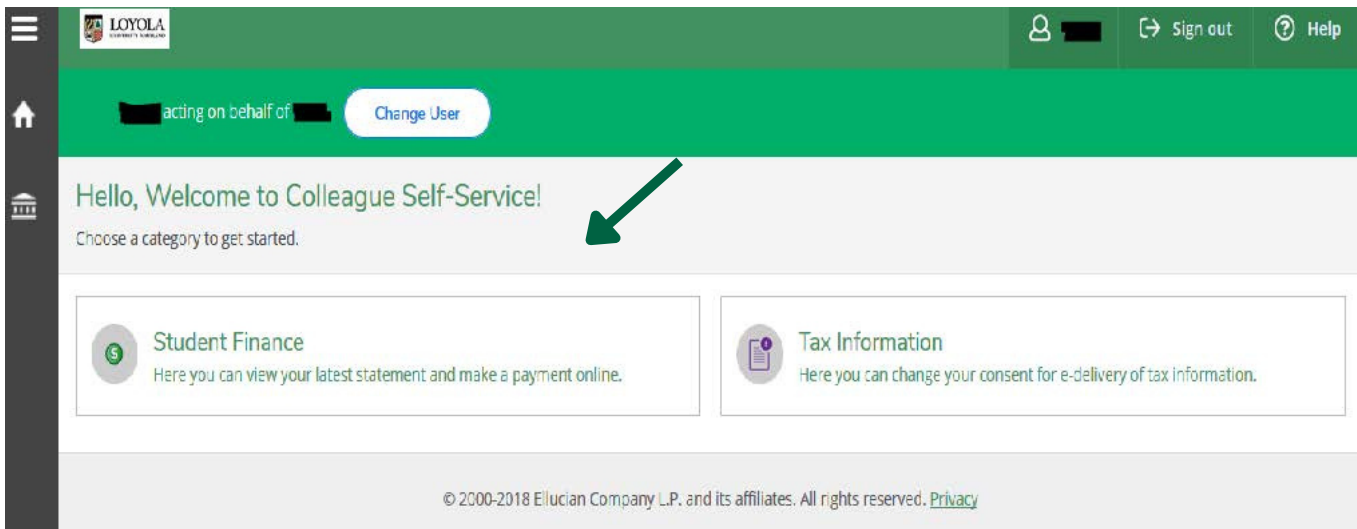
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There are two ways to access information. The first is by clicking the menu icon (three straight lines) in the upper left corner. This will cause the menu to expand.



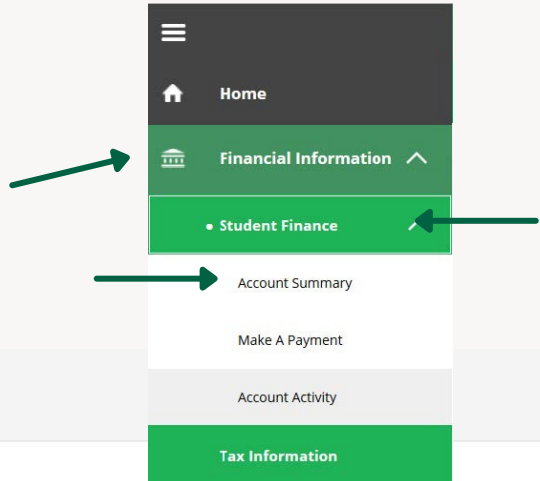
If you click on an item with an arrow, it will expand to another menu. Clicking on a menu item without the arrow will take you to that specific page.

The second method is to click the link on the welcome page for the area you want to view.



## Student Account Information

If you click on **Financial Information**, then click **Student Finance** and select **Account Summary** from the menu on the left, you will be taken to your student's **Account Summary** screen. On this screen, you will see an overview of your student's billing account. Also, you will be able to see the current balance and the other semester balances. Plus, you will be able to access the **Make a Payment** page from this page.



### Account Summary

View a summary of your account

### Account Overview

[Make a Payment](#)

Total Account Balance	\$3,085.00	<a href="#">Account Activity</a>
<a href="#">Spring 19</a>	\$3,085.00	
<a href="#">Fall 18</a>	-\$25.00	

To view the student's bill, click on the **Account Activity** link or the link for the semester that you want to view. When you click on the **Account Activity** link, it will automatically take you to the current semester, which is the top semester on the list.

This page will show you the balance for the term. It will also show you the charges, payments and financial aid for the term. You can click on the **Expand All** button to see all the individual items under each level or click on the down arrow on the right side of the item to expand only that item.

[Financial Information](#) · [Student Finance](#) · [Account Activity](#)

### Account Activity

View your Financial Activity

Term: Fall 10 - Balance for Term: \$135.00 [View Statement](#)

Charges \$150.00 - Payments \$15.00 = Balance for Term \$135.00

[Expand All](#)

Charges	\$150.00	▼
Payments	\$15.00	▼

To view the student's billing statement, click on **View Statement** near the top right of the screen. Billing statements can be viewed for any semester listed by clicking on the drop down arrow in the box next to **Term**. (If you choose to view a prior semester, any charges that have not been paid for future semesters, including the current one, will show as Future Balances.)

Click on **Student Finance** at the top of the screen and select **Account Summary**.

Financial Information · Student Finance · Account Activity

Account Activity  
View your Financial Activity

Term: Fall 10 - Balance for Term: \$135.00

Charges \$150.00 - Payments \$15.00 = Balance for Term \$135.00

Expand All

Charges	\$150.00	▼
Payments	\$15.00	▼

[View Statement](#)

## Making a Payment Instructions

You can access the **Make A Payment** screen in several ways. Use the menu item on the left side. Or you can click on **Make A Payment** on the **Account Summary** Screen. Or you can click on **Student Finance** at the top of the page and choose **Make A Payment**.

- Home
- Financial Information
- Student Finance**
- Account Summary
- Make A Payment**
- Account Activity
- Tax Information

or

acting on behalf of [Name] Change User

Financial Information · Student Finance · Account Activity

Account Summary

Make A Payment

Payment Plan Information

Account Activity

Term: Fall 10 - Balance for Term: \$135.00

Charges \$150.00 - Payments \$15.00 = Balance for Term \$135.00

Expand All

Charges	\$150.00	▼
Payments	\$15.00	▼

On the **Make A Payment** page, choose how you want to make the payment by clicking on the **Choose A Payment Method** button. You can pay by credit card or by e-check. Credit/debit card payments are accepted online only and will incur a 2.4% (minimum \$0.25) convenience fee. E-check payments can be submitted with no additional fee.

## Make a Payment

Use this page to make a payment on your account

Total Payment : \$5.00

Choose a Payment Method

Proceed to Payment

To select the items you wish to pay, click on the box(es) located under "**Select**" on the left side that you wish to pay. A check mark will appear in the box. If there are items that are overdue, they will already be checked. If the overdue amount has already been paid in a different semester, you can click on the box for that item to uncheck it.

When you have checked the items you wish to pay, click in the "**Amount to Pay**" box on the right side of the line and enter the amount of the payment for that semester in the box. The total amount due will default in, but you can change it if you need to.

Fall 10

\$135.00

Select	Item	Payment Group	Amount Due	Amount to Pay
<input checked="" type="checkbox"/>	STUDENT ACCTS REC	023	\$135.00	\$ 135.00

Please Note, credit amounts and amounts that have been set up as payment plan payments will not allow a payment to be made against that line. If you have a payment plan set up, you should continue to make payment plan payments through Nelnet.

Once you have selected your payment method and amount to pay, the **Proceed to Payment** button will become active. Click that button to be directed to the Payment Review screen.

### Credit Card Payment Review screen

## Payment Review

Review your Payment Information below

### Payment Review

You have chosen to pay the items below. If you agree to pay these items, click the Pay Now button below. You will be taken to a secure web site to enter your payment information.

Payment Information	
Item	Amount
STUDENT ACCTS REC	\$135.00
STUDENT ACCTS REC	\$4.00
STUDENT ACCTS REC	\$7.00
Credit Card Convenience Fees	\$3.50
<b>Total Payment Amount</b>	<b>\$149.50</b>

Payment Method: CREDIT CARD

Pay Now

## E-Check Payment Review Screen

### Payment Review

Review your Payment Information below

### Payment Review

You have chosen to pay the items below. If you agree to pay these items, click the Pay Now button below. You will be taken to a secure web site to enter your payment information.

Payment Information	
Item	
STUDENT ACCTS REC	
Total Payment Amount	

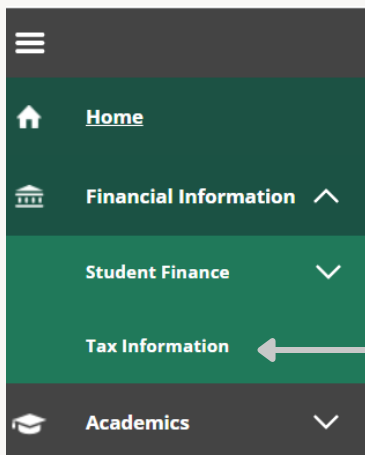
Payment Method: E-CHECK

Pay Now

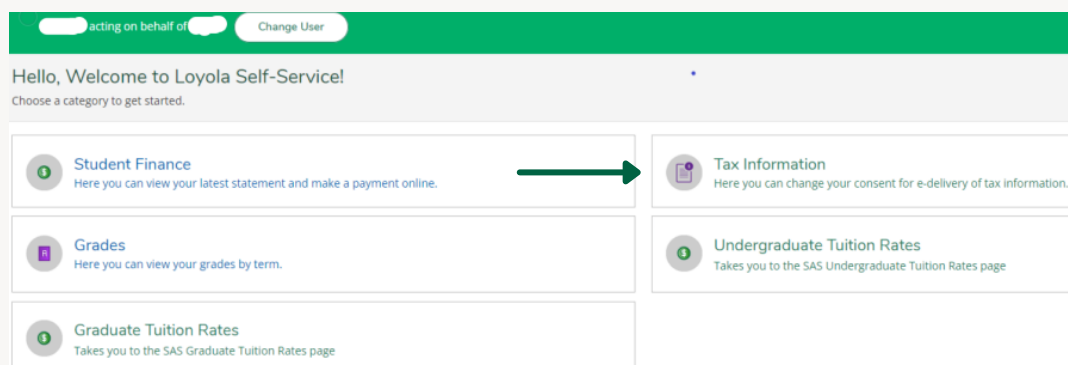
This screen will display the amount you have chosen to pay. To make the payment, click on the **Pay Now** button. Depending on the method you have chosen to make your payment, you will be taken to a screen that will allow you to enter either the bank information or the credit card information needed to make the payment. If you choose to pay by credit card, you will be redirected from Self Service to our payment processor's site. Also, you will incur a 2.4% (minimum \$0.25) convenience fee. E-check payments can be submitted with no additional fee.

## Accessing a 1098T Tax Document

You can also access your student's 1098T information if they have chosen to receive that form electronically. You can access this information from either the left side menu or the home page. Click on **Tax Information** to be taken to the screen.



or



As with all proxy access, if your student has not given consent for the University to provide this document to them electronically, you will not be able to view it.

[Financial Information](#) · [Tax Information](#)

## Tax Information

### 1098 Information

You have opted to withhold consent to view your 1098 online.



#### Withhold my consent

I choose to withhold my consent and understand by doing so that I will receive my official 1098-T in paper format. I understand that I have the ability at any time to return to this form and consent to receiving my official 1098-T in electronic format only.

### Electronic 1098 Consent History

Date	Consent Status
1/31/2021 7:13:39 PM	Consent Withheld
2/26/2013 4:04:47 PM	Consent Given

If your student has chosen to receive their 1098T electronically, you will see a message showing that they have opted into this service. Under that message is a list of all 1098T statements they have received as a student at the University. You will also see their consent history.

To view a 1098T for a specific year, click on the link for that year. The form will open as a PDF. You can use your browser's features to print or save the file. If the form opens in a new window, you can close that window and go back to Self Service. If it opens in the same window, you must use your browser's 'back' feature to go back to Self Service. If you close the window, you will be logged out of Self Service.

[Financial Information](#) · [Tax Information](#)

## Tax Information

### W-2 Information 1098 Information

You have opted to receive your 1098 in electronic format.

[Change Preferences](#)



#### Receive my 1098 only in electronic format

By selecting this option, I agree to receive my official 1098-T only in electronic format by accessing WebAdvisor and viewing/printing. I understand that by consenting to receive my 1098-T tax form in electronic format, I will not receive a paper 1098-T statement. I understand that I have the ability at any time to return to this form and remove my consent.

### 1098 Statements

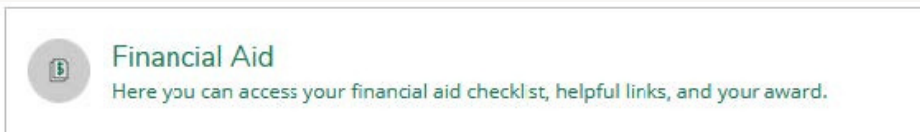
Tax Year	Notation
2015	<a href="#">2015 1098T Statement</a>
2014	<a href="#">2014 1098T Statement</a>

### Electronic 1098 Consent History

Date	Consent Status
6/25/2014 10:26:26 AM	Consent Given

# Financial Aid

If your student has granted you access to their financial aid information, follow the instructions above to log in to Self Service and select your student's record. Click on Financial Aid to access the Financial Aid module.



Once in the module, you will be presented with the Financial Aid Home screen. This will display a summary of your student's Financial Aid package. From here, you can access detailed information on other screens.

For more detailed instructions, please visit Loyola's Office of Financial Aid web page at <https://www.loyola.edu/department/financial-aid>.