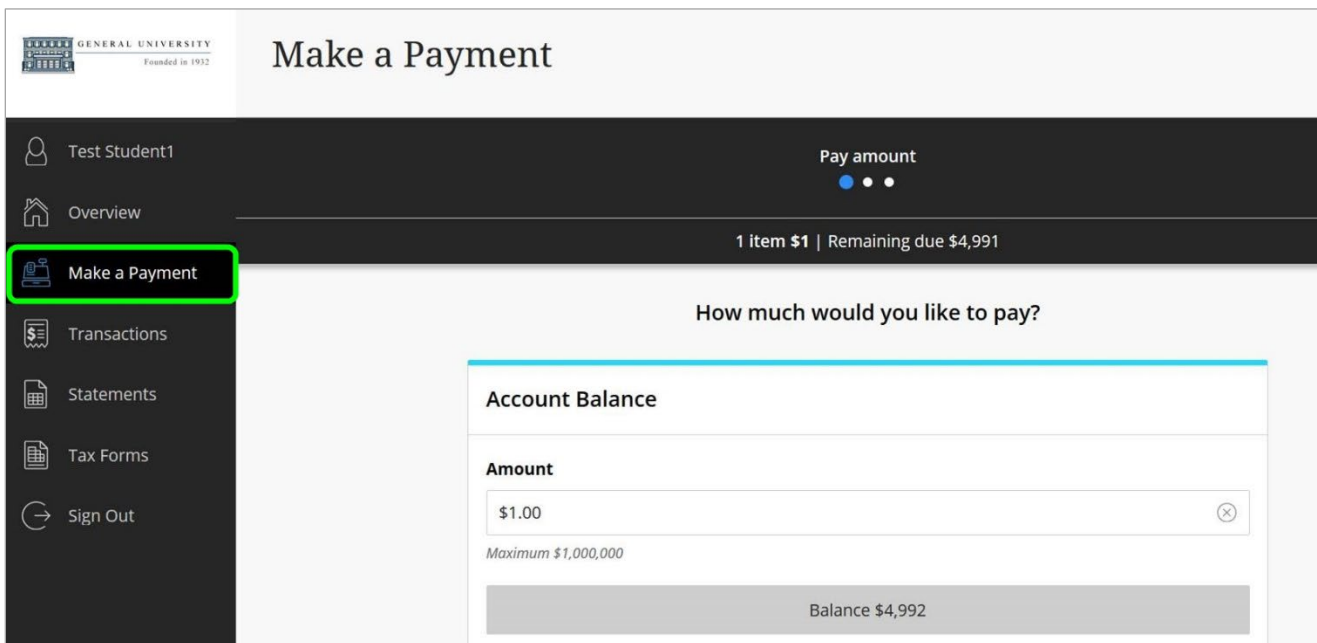


## Payer Experience in Transact Payments SAO

The steps below illustrate how a student/beneficiary or parent makes a payment using a 529 Savings Plan. The workflow for an eMarket Checkout is similar.

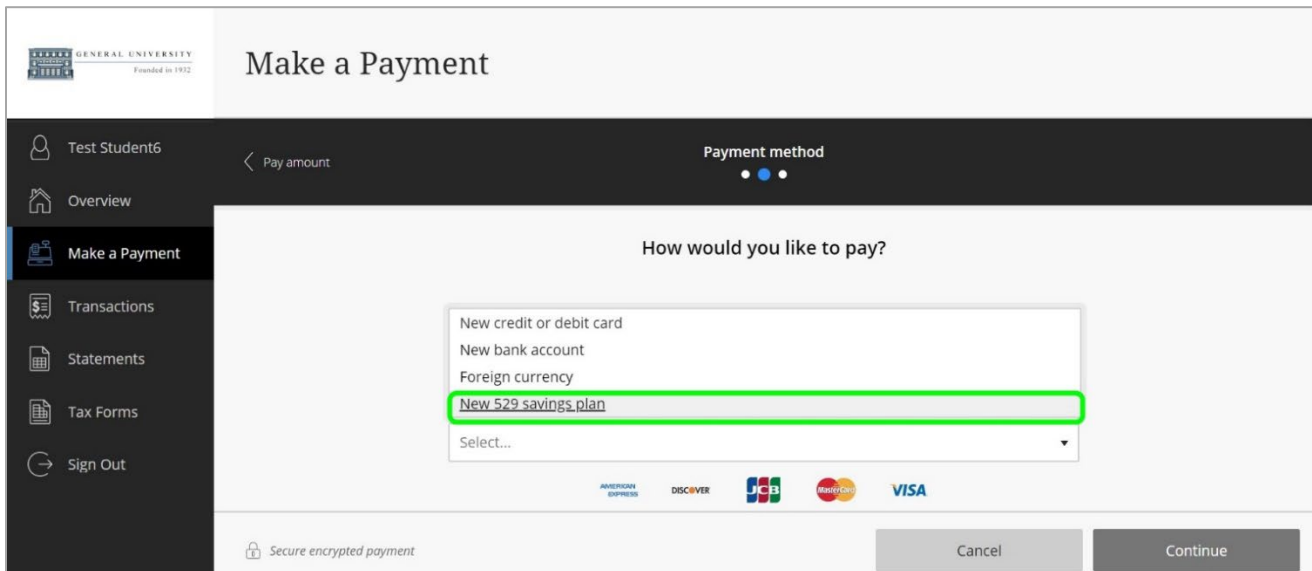
1. Log in to the SAO site, either directly or via SSO.
2. In the SAO site's navigation, click **Make a Payment**.

Figure 1: Make Payment Link in SAO



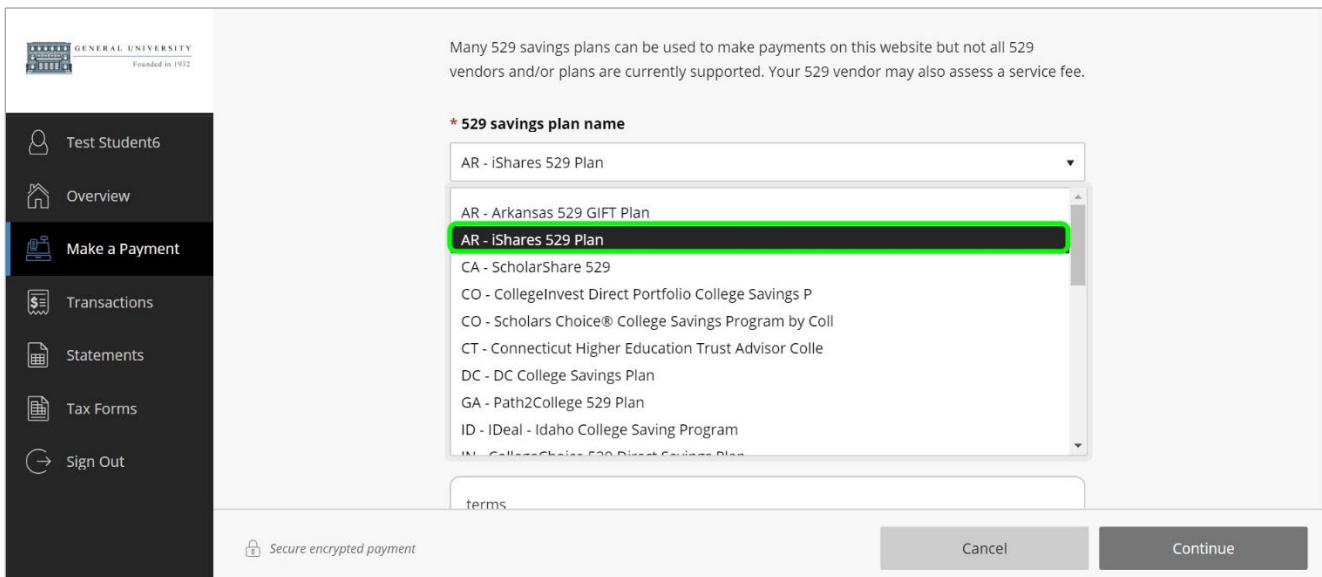
3. Select the item(s) for purchase, enter the amount, and click **Continue**.
4. In the Select Method of Payment screen, click **New 529 Savings Plan**.

Figure 2: New 529 Savings Plan Payment Method



- From the dropdown menu, select your 529 savings plan.

Figure 3: Selecting 529 Plan Name



- Provide the 529 account number and agree to the 529 terms.

**Note:** During your implementation of 529, you will use the 529 Terms and Conditions, configured in 529 control, to present Terms and Conditions informing the customer that 529 Plans must be used for qualified educational expenses.

**Figure 4: Entering 529 Information**

**\* 529 savings plan name**  
AR - iShares 529 Plan

**\* 529 savings plan account number**  
11 digits

**529 service fee**  
\$10.00  
*This fee will be deducted from your 529 plan account in addition to the requested withdrawal amount*

**529 savings plan terms and conditions**  
terms

I have read and agree to the 529 savings plan terms and conditions.

Secure encrypted payment

Cancel Continue

7. In the 529 Savings Plan modal window that loads, enter your username and password, and click **Log On**.

**Figure 5: Logging In to 529 Plan**

**529 savings plan**

Passphrase  
money

Username  
Test123

Password  
.....

[Forgot password?](#)

**Log On**

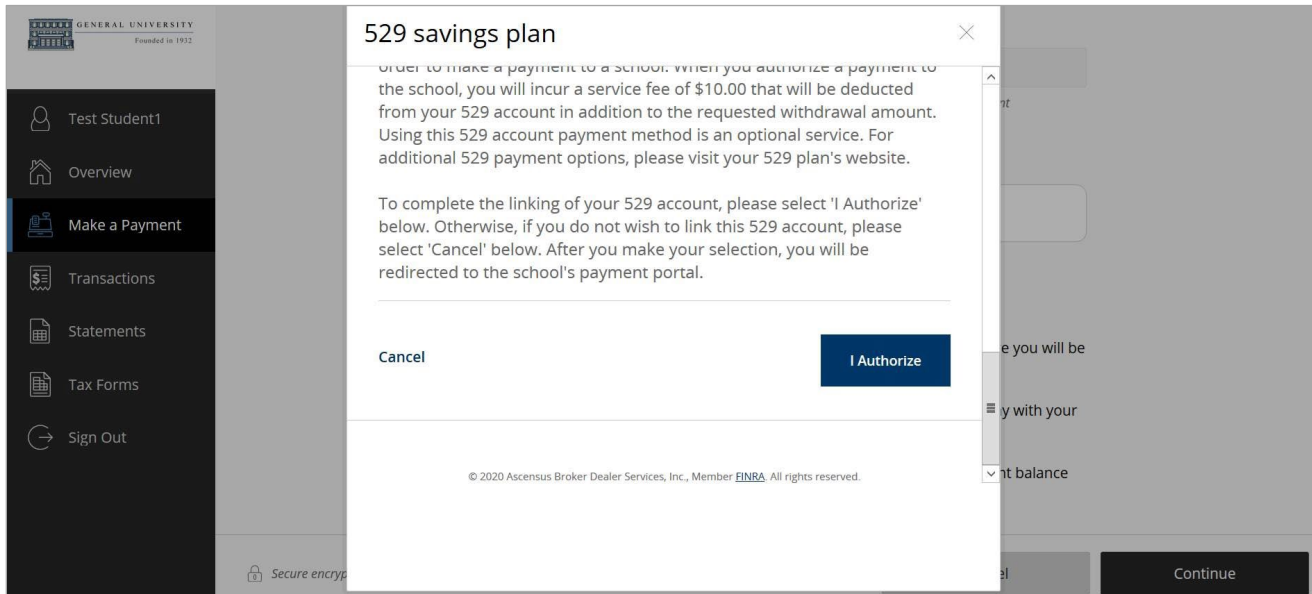
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Secure encrypted payment

Continue

8. Review the amount available in the plan and authorize the payment by clicking **I Authorize**.

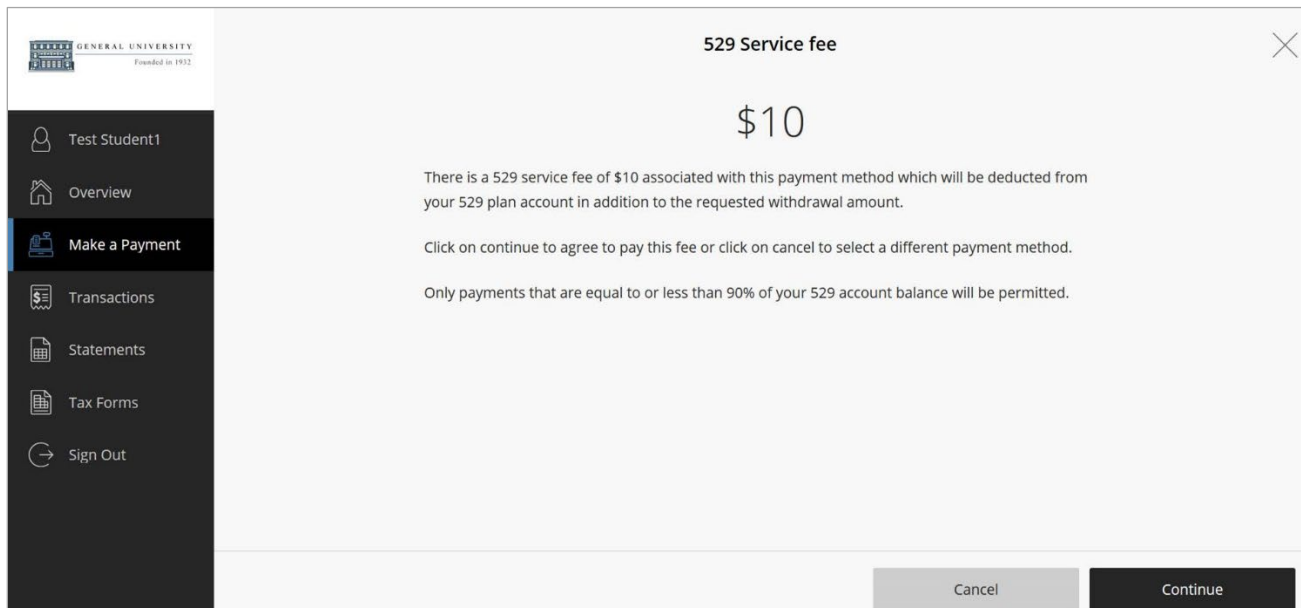
**Figure 6: 529 Savings Plan Authorization**



The modal window closes, and Transact Payments displays a message about the service fee.

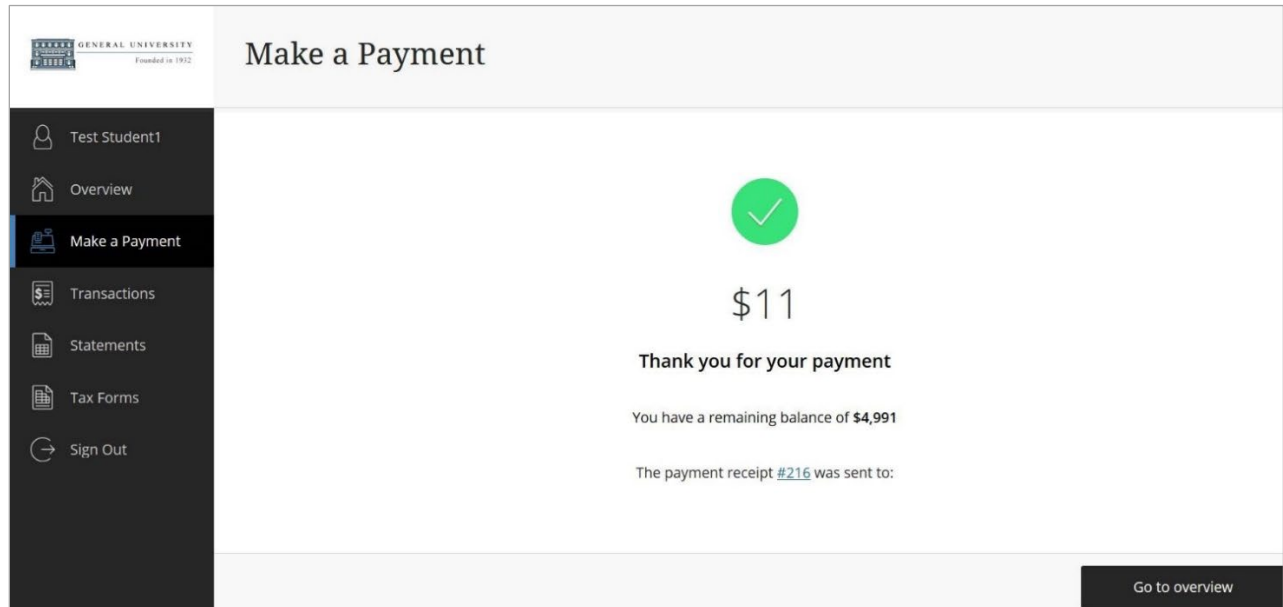
9. Click **Continue** to accept the service fee and make the payment.

**Figure 7: 529 Service Fee Message**



If the payment is authorized, a confirmation message displays, showing your remaining balance.


Figure 8: 529 Payment Confirmation



The screenshot shows a web interface for 'GENERAL UNIVERSITY' with the text 'Founded in 1932'. The main heading is 'Make a Payment'. A dark sidebar on the left contains navigation links: 'Test Student1', 'Overview', 'Make a Payment' (highlighted), 'Transactions', 'Statements', 'Tax Forms', and 'Sign Out'. The main content area features a green checkmark icon, the amount '\$11', and the text 'Thank you for your payment'. Below this, it states 'You have a remaining balance of \$4,991' and 'The payment receipt #216 was sent to:'. A 'Go to overview' button is located in the bottom right corner.

By clicking the receipt number, you can view the receipt online, as shown below.

**Figure 9: 529 Payment Receipt**

Transactions
Receipt 

**Receipt**  
#32  
Test Student7  
ID: 800000007

Date: 11/12/19  
Business date: 12/18/06  
Method: 529 savings plan

Total amount  
**\$11.00**

*[hyperlinks are supported](#), BOLD and Italics options available.*

Description	Amount
Account Balance (Spring 2020)	<b>\$1.00</b>
529 service fee	<b>\$10.00</b>
<b>Subtotal</b>	<b>\$11.00</b>
Total	<b>\$11.00</b>

Payments received	Amount
iShares 529 Plan Account #XXXXXXXX59-01 Authorization #LA05-9305204	<b>\$11.00</b>
Total	<b>\$11.00</b>

After making the payment, you can now select the saved 529 payment plan when making a payment through the SAO site.

**Figure 10: 529 Saved Account in Payment Method Dropdown**

