Payments Support Reference Guide

As part of your Integrated Payments implementation, your institution has access to our Support team. This guide walks you through how to contact Illumia Support, the services they provide, and the Service Level Agreement included with your Integrated Payments subscription.

Note: Integrated Payments may occasionally change the details of our service offerings. When this occurs, we will update this guide and upload the latest version to the Integrated Payments Support Library.

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Services Provided by Illumia Support

Illumia Support is available to help with inquiries and resolve issues that arise while using Integrated Payments. Typical areas where we offer assistance include:

- Difficulty accessing the service.
- Questions about how to configure or use the service to perform specific tasks.
- Problems when an aspect of the service does not appear to be working properly.
- Resetting forgotten or expired passwords in your Production or Train environments.

Contacting Support

You can contact Support in a couple of ways:

- Phone: 1-888-381-8054, option 1.
- Illumia Connect self-service portal: https://connect.transactcampus.com

Note: If you encounter an urgent matter, such as difficulty posting transactions, please contact us by phone for immediate support.

When you contact Support, your case is added to a queue visible to all Support staff. We recommend always selecting "Reply All" on emails from Support. This ensures your reply reaches both the queue and the team member managing your case.

System Status Alerts

To keep users informed about system status and upcoming maintenance, Illumia utilizes StatusCast. We encourage you to subscribe for real-time updates. You can manage your preferences by visiting our StatusCast page at https://status.transactcampus.com/.

Choose your notification preferences, including email, SMS, or Slack.

Authorized Support Contacts

- Each Integrated Payments client designates two staff members to serve as Authorized Support Contacts when Integrated Payments is implemented.
- Authorized Support Contacts can designate who may contact and open cases with Illumia Support, request configuration changes to Integrated Payments, and request (or perform) password resets.
- Authorized Support Contacts are responsible for maintaining the institution's contact list. Any updates to the contact list should be communicated to our Support team by phone or email.
- For security reasons, changes to the Authorized Support Contact list must be made by an existing Authorized Support Contact.

Who May Contact Illumia Support

Any member of a client's staff may contact Illumia Support, provided the person meets the following two criteria:

- The person must have been previously authorized to contact Support by an Authorized Support Contact. To authorize someone to contact Support, an Authorized Support Contact must provide Support with the name, phone number, and email address of the person by phone or email.
- The person must have attended Integrated Payments training for the module of the system that pertains to the request for assistance. This training can be performed in a variety of ways, including classes held at your institution, classes offered at an Illumia User Group Conference, and web-based training.

Support will provide operational assistance to users who meet these criteria. For urgent issues that require immediate attention, any representative of the school or institution should call 1-888-381-8054. However, for security reasons, Illumia will not provide confidential information from the system with anyone other than the designated Authorized Support Contacts. Similarly, Illumia will not accept requests to perform password resets, configuration changes, or other modifications to the system unless the requests come from Authorized Support Contacts.

Hours of Operation

Support is open from **5:00 AM to 5:00 PM Pacific Time, Monday through Friday**. You may open a case through the Illumia Connect self-service portal 24 hours a day, 7 days a week. If you open a case through the portal outside of the regular hours of operation, we will respond on the next business day.

Support is closed on the following holidays: New Year's Day, Martin Luther King, Jr. Day, Memorial Day, Independence Day, Labor Day, Columbus Day, Thanksgiving Day, the Friday after Thanksgiving Day, and Christmas Day. In addition, we may have reduced hours on Federal Reserve holidays, when many client institutions are also closed.

Clients who anticipate a need for support outside our regular hours of operation may plan 7 days in advance for a representative to be on call. There may be an additional charge for this service.

Information to Have Available When Contacting Support

When reporting an issue to Support, please provide as much of the following information as you can:

- The Integrated Payments environment you were using when the issue occurred (i.e., Production or Train).
- The screen, program, or menu item you were attempting to access.
- The student or Integrated Payments operator ID encountered the issue.
- The date and time the issue occurred.
- Any significant identifiers, such as student IDs or transaction numbers, which can help us locate and diagnose the problem.

Feel free to reach out to our Support team even if you do not have all the necessary information. However, please understand that in some cases, our ability to assist you may be limited without this data.

What to Expect When You Contact Illumia Support

When you contact Illumia Support, a team member will generally be available to assist you immediately. If all Support team members are assisting other customers, you will be asked to leave a message, and a team member will call you back as quickly as possible.

Depending on the nature of your issue, you may be asked to perform various steps to help resolve it or assist with troubleshooting. You may also be asked to provide screenshots of any error messages you encountered. In certain cases, a Support team member may email you a procedure to follow.

Illumia Support uses certain tools to assist with troubleshooting. Under certain circumstances, team members may request an online meeting so they can view your Integrated Payments screen and observe the issue firsthand. If you report a connectivity problem, we may ask you to install and run a piece of software that repeatedly attempts to connect to our site over a period of time, then send us the resulting log file.

In many cases, the Support team member will resolve your issue during the initial call. If the issue requires further research, it will be escalated to Senior Level Support.

Support Plans

Illumia Maintenance and Support Schedule are an attachment to the Integrated Payments License and Services Agreement Master Terms. Support Schedules for software and hardware contracts have different support service levels.

Table 1: Support Plans

SOFTWARE SUPPORT	STANDARD	PLATINUM+
Technical Support during normal Client Support hours: North America 6AM to 6PM MST (Phoenix, AZ; no daylight savings) Australia & New Zealand 6AM to 5PM AEST International: 6AM to 6PM US-MST (UTC -7:00)	X	X
24 x 7 Severity 1 Emergency Outage Support Response target within 60 minutes for Severity 1 cases.	X	X
Assigned a Senior Dedicated Support Engineer Dedicated phone number for direct routing to assigned Engineer.		X
Quarterly Business Review Trending Analysis based on Institutions needs and prioritization for a proactive approach. Requests for this review must be made in advance by primary contact.		X
24 x 7 availability of scheduled, non-emergency troubleshooting assistance (excluding holidays)	X	X

Case Tracking

Once we have established that a case needs to be opened, calls to Support are logged into our tracking system for further handling. The case is used to track all activity on an issue; from the time you report it until it is resolved. When your issue is added, you are given a unique Case Number that identifies your issue in the tracking system.

Please take note of the Case Number provided and use it when communicating with us regarding the issue. By including the Case Number on subsequent calls regarding the same issue, we will be able to locate case notes and history, provide you with the current status, and bring the case to a resolution more quickly. Not including the case number may delay our response time.

When issues are reported through the self-service portal, they automatically become cases. The system assigns a case number, which will be displayed once your issue is saved. You can revisit the self-service portal at any time to view updates and the status of your case.

Service Performance: Case Priority Levels

Each case is assigned a priority based on the impact the issue has on operations. These priorities play a vital role in determining the order of attention given to issues and the speed at which various departments within Illumia respond. Therefore, accurately assessing case priority is crucial. The following table lists our case priority levels.

Note: When reporting an urgent problem, please call **1-888-381-8054** for immediate assistance.

Table 2: Case Priority Levels

SEVERITY	TITLE	DESCRIPTION	EXAMPLE	RESPONSE TIME
1	Critical – Single Client Down	A major component such as Cashiering, EBPP, or ePayment is not usable.	Crashes when trying to start Cashiering. One client cannot receipt transactions.	1 hour
2	High – Prevents Completion of Daily Work	Transactions can be received but cannot be properly posted, balanced, or settled, or there is another issue significantly interfering with the business office's operations.	Credit cards will not settle.	4 hours
3	Normal (default for new cases)	Most issues not categorized above, including questions or problems that do not severely impact the ability to receipt, post, balance, or settle payments.	Unable to change a receipt trailer.	1 business day
4	Low	Issues which the customer agrees do not require prompt attention.	A field heading is misspelled on a screen.	2 business days

Enhancement Requests

Illumia welcomes and encourages ideas from our clients on how to improve our products. Many valuable improvements in Integrated Payments have been inspired by suggestions provided by our clients over the years. Should you have any specific requests regarding functionalities you would like Integrated Payments to offer, please do not hesitate to inform Support through phone, or the Self-Service Portal. Your enhancement request will be logged into our case tracking system, and you will be given a case number to track the request.

Illumia personnel meet regularly to review enhancement requests and decide which ones will be included in upcoming releases. Prioritization takes the following factors into account:

- How many clients are likely to benefit from the enhancement?
- How much will the enhancement benefit those clients who use it?
- How long will it take to implement the enhancement?
- Will the enhancement have any negative impacts, such as making the system run more slowly or making it more complex to use?

When contacting Support to request an enhancement, please explain the reason for the enhancement (i.e., what business problem you are trying to solve). Support can often highlight alternative options that already exist for clients to achieve the same objective. Also, if you are requesting multiple enhancements, please indicate the relative priority of each one. This helps us assess the importance of each enhancement for your needs.

Upgrade Requests

Support may require significant lead time to schedule upgrade requests. These requests consist of two main categories: (1) Integrated Payments -ERP interface upgrades after you upgrade your ERP, and (2) changes to your networking configurations, including your VPN or firewall rules, protocols, and ciphers (e.g., SSL to TLS or RC4 removal), and Shibboleth single sign-on.

Although upgrade requests can vary significantly, in most cases Support will need to gather information about your configuration and have your Integrated Payments -trained technical resources perform tasks in your environment. After we discuss the requirements to complete your upgrade request, we will determine a timeline for completion.

The table below provides an overview of the initial steps required for each upgrade type as well as the approximate timeline for completion. If you have any questions, please contact our Support team.

Table 3: Upgrade Steps and Approximate Timeline

UPGRADE TYPE	INTIAL UPGRADE STEPS	APPROXIMATE TIMELINE
Integrated Payments - ERP Interface	Please fill out the ERP Upgrade Form associated with your ERP, located in the Integrated Payments' **Support Library > Forms > ERP Upgrades** folder and send it to Support. If a form is not available for your ERP, contact Support for instructions.	45 days

UPGRADE TYPE	INTIAL UPGRADE STEPS	APPROXIMATE TIMELINE
Networking Configurations/Other	Please contact Support as soon as possible for instructions prior to performing your upgrade and for determining a timeline for completion.	May vary significantly depending on the request.

Password Requests

There are four types of password reset requests that Integrated Payments clients and Support handle:

- Integrated Payments operator passwords, used to log in to the Integrated Payments Administration site.
- Student passwords used to log in to the ePayment site.
- Parent PIN passwords used to log into a student's ePayment site.
- EFT server passwords used to securely transfer files to and from Integrated Payments.

Reset requirements and procedures for each of these are slightly different and are explained below in greater detail.

Note: Please take note that for security purposes, only a limited number of Illumia Support personnel are authorized to perform password resets. As a result, it may take up to 24 hours to reset a password via Support.

Operator Password Resets

If a client staff member needs their Integrated Payments operator password reset, either because they have forgotten it or because it has expired, they should first contact the institution's Integrated Payments Administrator, Authorized Support Contact, or other individuals at the school who have been granted permission to reset operator passwords. This security measure is essential because Support lacks visibility into all of a client's staff members, making it challenging to determine recent changes like transfers, suspensions, or terminations.

If an Integrated Payments Administrator or Authorized Support Contact needs their own password reset and nobody else is available with the necessary permissions to do so, that person may contact Support for assistance. After following our established security procedures, Support will reset the operator password for the Integrated Payments Administrator or Authorized Support Contact.

Student Password Resets

Support cannot reset student passwords, which are often maintained outside of Integrated Payments in the institution's ERP self-service portal. If Integrated Payments Administrators or Authorized Support Contacts want to set a student's Integrated Payments password to a known value and have the necessary permissions to do so, they may do so through the Customers page in Integrated Payments System Setup.

Parent PIN Password Resets

For privacy and compliance with the Federal Education Records Privacy Act of 1974 (FERPA), neither Support nor school staff may view or reset a Parent PIN password. Students themselves must log into the ePayment site to reset Parent PIN passwords themselves.

EFT Password Resets

When Integrated Payments is first deployed, administrators are provided with two sets of login credentials for the Integrated Payments EFT server, corresponding to the school's Production and Training environments. Support does not store and cannot retrieve these credentials.

An Integrated Payments Administrator or an Authorized Support Contact may contact Illumia to request a reset of a school's secure file transfer password if necessary. This reset will break any existing automated transfer processes, shell scripts, etc., that rely on the original credentials.

Production and Train environment EFT credentials may be reset independently of each other.

Client Responsibilities

To provide effective support, we ask our clients to cooperate and assist with the following:

- Clients are encouraged to designate only their Authorized Support Contacts to reach out to Support. Only Authorized Support Contacts may use the Support Self-Service Portal. To grant access to the portal for a specific user, the Authorized Support contact can reach out to Illumia Support.
- Clients should make sure that all personnel contacting Support have been properly trained to use Integrated Payments. If needed, Integrated Payments training in a variety of forms is available for an additional fee.
- When using modules or interfaces that require technical expertise, clients may need to involve resources from within their organization with the appropriate skill levels. Examples of these include single sign-on integration or eMarket checkout implementation.
- Clients should not instruct their customers (e.g., students, parents, or authorized payers) to contact Support for assistance. Students, parents, and authorized payers should call the SmartPay Support Line at **1-800-339-8131**.
- When reporting a problem, clients are responsible for assisting Support in reproducing the problem.
- When reporting an urgent problem, please call **1-888-381-8054** for immediate assistance.

Reference Manuals & Other Documentation

Reference manuals for Integrated Payments modules are available in the Support Library, located within the Integrated Payments Administration site under the Training & Support link in the left column. These manuals are for the exclusive use of authorized Integrated Payments operators at your institution; you are responsible for keeping this information restricted to Integrated Payments operators at your school.

You are welcome to access these reference guides and manuals on our website at any time. However, you may not post them to your own website or otherwise electronically store or reproduce them.

PCI Compliance

Illumia operates in compliance with the Payment Card Industry Data Security Standard (PCI-DSS). Illumia is certified as a Level 1 Service Provider under both VISA Cardholder Information Security Program (CISP) and MasterCard Site Data Protection (SDP). Evidence of this compliance may be verified by visiting the Visa or MasterCard website or by contacting your Client Manager.

System Availability

Illumia will use its best efforts to ensure 99.9% availability of the service. **"99.9% Availability"** means that the service will be unavailable no more than 43 minutes (> .10%) in any calendar month, as determined by Illumia (excluding any period of unavailability described in Exception section below). The service shall be deemed to be unavailable when Integrated Payments' automated monitoring system is unable to access the web or database servers of the service (**"Unavailability"**).

Exceptions: Illumia's service level commitment does not cover any unavailability attributable to: (1) Customer's use of the service otherwise than in accordance with the documentation or with user manuals from time to time made available to customer; (2) Any data entered into the service by customer; (3) Any event beyond the reasonable control of Illumia, including the malfunction or unavailability of any public Internet backbone or network or of any server or other equipment outside of Illumia's facility, or any failure of customer's equipment or local access service, or (4) Scheduled Maintenance pursuant to Scheduled Maintenance Windows section below.

Scheduled Maintenance Windows

Periodically it is necessary for Illumia to perform maintenance activities on the environment. Maintenance windows occur every **Sunday** between **1:00 AM and 6:00 AM Eastern Time**. Because the Integrated Payments environment is fully redundant, most activities can be performed on one server at a time and do not result in any disruption to users. During this time, capacity and redundancy may be reduced, but the site continues to operate normally from the perspective of end users. Batch jobs are never scheduled during the maintenance window, and clients are advised not to schedule batch file transfers during this period.

If we anticipate maintenance will have an impact on end users, we will inform Integrated Payments Administrators by email. Except in the case of an emergency, notification takes place at least 24 hours in advance. Whenever possible, such maintenance is planned for Sunday mornings, which are normally the lightest usage period for the environment.

In extremely rare cases, maintenance activities may extend beyond the normal window. This occurs when essential tasks require more than three hours and cannot be divided into smaller steps. Should this be necessary, the maintenance will be scheduled for weekends or holidays and Integrated Payments Administrators will be notified at least **72 hours** in advance.

Software Releases and Refreshes

New versions of Integrated Payments are released periodically throughout the year, with frequency varying by release cycle. Releases typically contain a combination of new features, enhancements to existing modules, and bug fixes.

Support coordinates with clients to upgrade Train environments and distribute release notes. Once Train environments have been upgraded and clients have had reasonable time to test, Production environments are upgraded. To minimize disruptions, all upgrades are scheduled in advance and take place outside regular business hours.

Because Integrated Payments is a hosted solution, we are not able to leave older versions of the software in place for extended periods. Clients who want to test new releases should do so promptly once the release becomes available. If you foresee a conflict with a scheduled upgrade date, please contact Support promptly so accommodations can be arranged.

When minor bugs are discovered in a release, Illumia Support will create a refresh to address the problem. Refreshes are minor updates to the code which can be applied without any downtime or changes to client configurations. These are performed on an as-needed basis and do not require advance planning by clients.

Train Environments

In addition to a Production environment, each Integrated Payments client receives access to a Train environment that can be used for training new staff members, testing new procedures and interfaces, and other purposes. When a new release of Integrated Payments becomes available, the client's Train environment will be upgraded prior to the Production environment.

The Train environment is created by making a full copy (sometimes called a "clone") of the Production environment. This is performed approximately one week after the client goes live. The Train environment is accessed using a separate URL.

At the client's request, the data in the Train environment will be refreshed by making another full copy of the Production environment once every 12 months. More frequent refreshes are available for an additional charge, as are additional Train environments.

Networking Information

For details regarding networking information, like email IP addresses that need to be allowed, consult the *Payments Technical Reference Guide* found in the Support Library via the Training & Support link.