How to View My Account Statement in Portico

A. Go to [http://portico.leeuniversity.edu](http://portico.leeuniversity.edu), click on Portico Login

B. When “Connect to portico.leeuniversity.edu” box pops up, insert User name and Password, click Sign In.
C. In bottom right hand corner of screen, go to **Self-Service Menu** tab, click **Student Financial Information**:

![Self-Service Menu](image)

- To view your account information (such as charges, payments, and/or financial aid),
  click **View Account and Make Payments**

![View Account and Make Payments](image)
a. Click on *Account Activity*

![Account Activity screenshot](image)

b. The *Account Activity* defaults to the current term. To change terms, click on the term drop down box and click on the term you want to view, then Click on *View Statement*

![View Statement screenshot](image)
c. Your statement will pop up in a separate window.

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This area shows a summary of all charges by category, payments, financial aid, payments (if applicable), refunds issued and credits on the account. It also shows the actual current balance due on the account.

This area shows the details of each class you are registered for in the current term.
This area shows the detail of the charges by Tuition (1), Fees (2), Room and Board (3), and Miscellaneous Charges (4).

The final page of the statement shows Financial Aid (1), Refunds issued to you (2), and Balance (3). If you have Financial Aid which has not actually paid to your account, it will be listed under the “Not Yet Disbursed” (A) column. All aid which has actually paid and is reflecting in your balance is listed in the “Disbursed” (B) column.

Balance reflected on this statement does NOT include Financial Aid not yet disbursed.
d. To see the detail of Charges or Anticipated Financial Aid without viewing your statement, click the *Expand All* button. To see the detail of only one category, click on that category:

2. If you have a balance on your account, you can make a payment using Portico.

   a. To make a payment to your account, click on *Make A Payment*
b. Follow these steps:
   i. Choose Payment method from the drop down box (A)
   ii. Enter the amount you want to pay (B)
   iii. Click Proceed to Payment (C)

c. Click on Pay Now:

d. You will be asked to enter your payment method information and verify your account holder information: The zip code must match the billing zip code of the credit card. Click Continue
e. The next screen asks you to verify the payment information and amount is correct. Click *Make Payment*

![Make Payment screen]

f. If the payment is successful, you will receive a confirmation number. Keep this number for your records. Click *Continue*

![Confirmation of Payment]

Do not press the browser Back button, use the Continue button below

Continue

g. You will be directed to a final confirmation screen, click *Continue* to go back to the main screen. The payment will be reflected in your balance on the main screen.

Still have questions? Please contact us at [sfs@leeuniversity.edu](mailto:sfs@leeuniversity.edu)