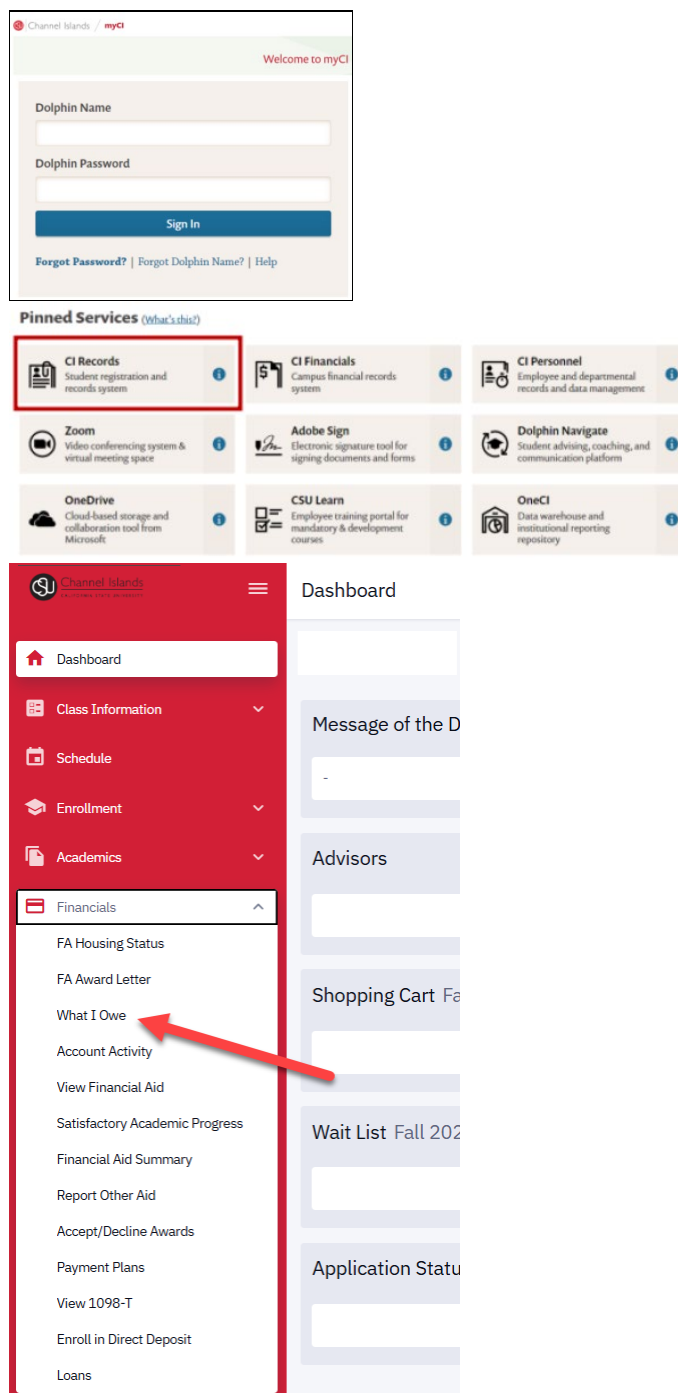


How to Pay Using Your 529 College Savings Plan

1. Login to myCI portal.
 - Dolphin Name and Password are case sensitive.
 - If you forgot your password, click on **'Forgot Password'**.
2. Locate and click on the **'CI Records'** tile. You will be routed to your Student Dashboard.
3. From the left-hand menu, go to the **'Financial'** section and click on **'What I Owe'**.

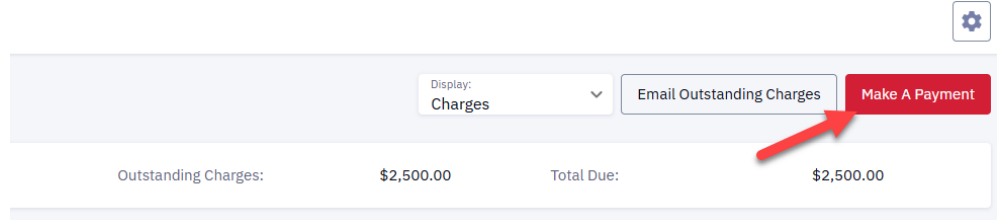


The first screenshot shows the myCI login page with fields for Dolphin Name and Dolphin Password, a Sign In button, and links for Forgot Password? and Forgot Dolphin Name? | Help.

The second screenshot shows the Pinned Services section with a grid of tiles. The 'CI Records' tile is highlighted with a red box. Other tiles include CI Financials, CI Personnel, Zoom, Adobe Sign, Dolphin Navigate, OneDrive, CSU Learn, and OneCI.

The third screenshot shows the Student Dashboard with a left-hand menu. The 'Financials' section is expanded, and the 'What I Owe' option is highlighted with a red arrow. Other options in the Financials menu include FA Housing Status, FA Award Letter, Account Activity, View Financial Aid, Satisfactory Academic Progress, Financial Aid Summary, Report Other Aid, Accept/Decline Awards, Payment Plans, View 1098-T, Enroll in Direct Deposit, and Loans.

4. Select the **'Make a Payment'** button.



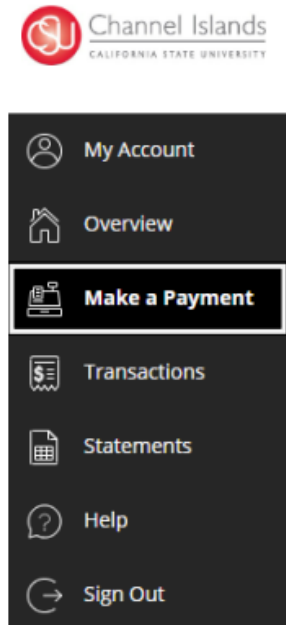
Display: Charges

Email Outstanding Charges

Make A Payment

Outstanding Charges: \$2,500.00 Total Due: \$2,500.00

5. Select the **'Make a Payment'** link in the margin.

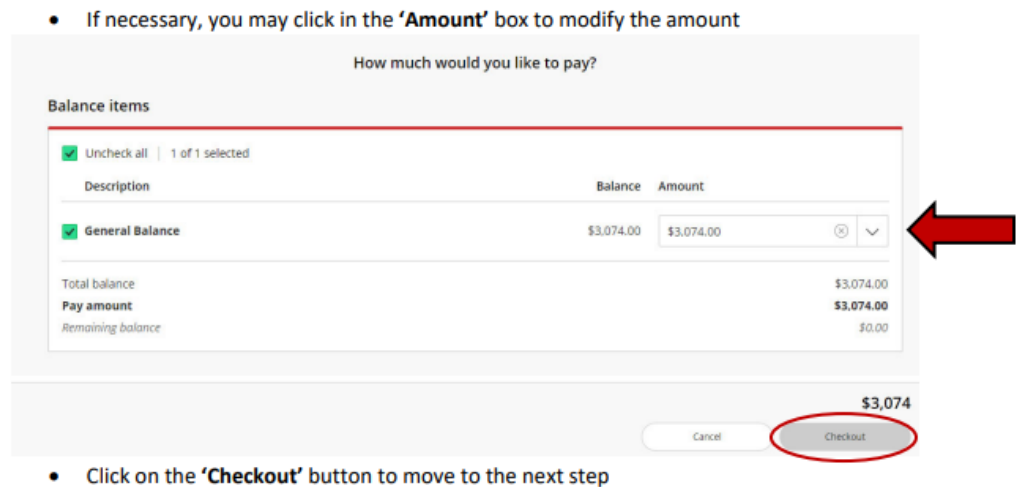


 Channel Islands
CALIFORNIA STATE UNIVERSITY

- My Account
- Overview
- Make a Payment**
- Transactions
- Statements
- Help
- Sign Out

6. Select the **'General Balance'** option.
 - If necessary, you may click in the **'Amount'** box to modify the amount.

- If necessary, you may click in the **'Amount'** box to modify the amount



How much would you like to pay?

Balance items

☒ Uncheck all | 1 of 1 selected

Description	Balance	Amount
☒ General Balance	\$3,074.00	\$3,074.00
Total balance		\$3,074.00
Pay amount		\$3,074.00
Remaining balance		\$0.00

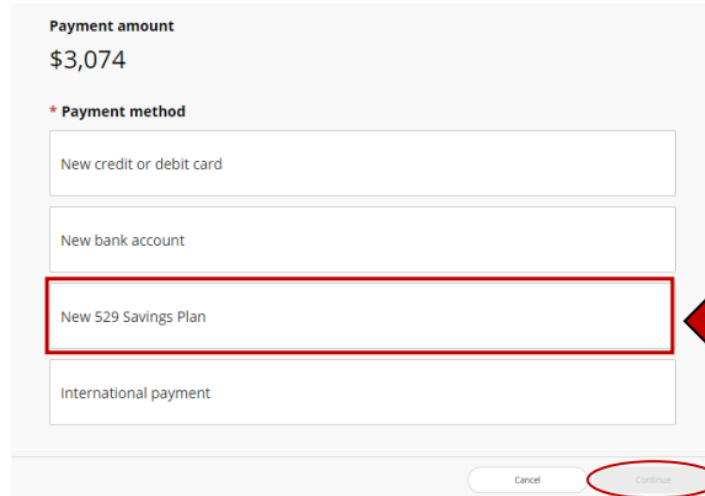
\$3,074

Cancel **Checkout**

- Click on the **'Checkout'** button to move to the next step

Student Business Services
Marin Hall – First Floor
Phone: (805) 437-8810
Email: sbs@csuci.edu

7. Select the **'New 529 Savings Plan'** payment method.



Payment amount
\$3,074

* Payment method

New credit or debit card

New bank account

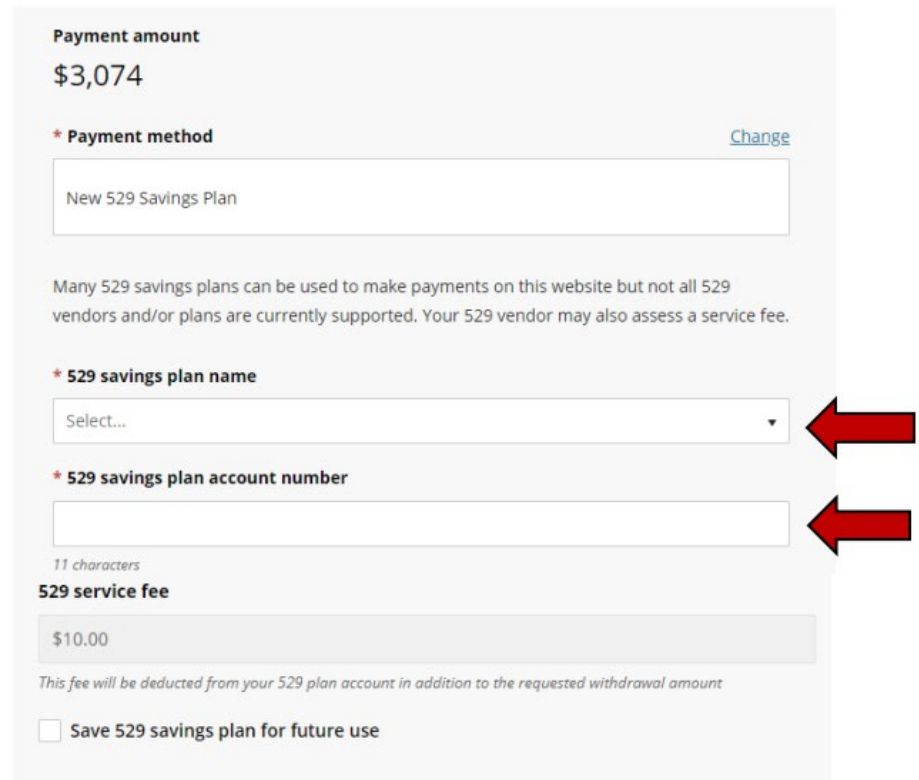
New 529 Savings Plan

International payment

Cancel Continue

- Click on the **'Continue'** button to move to the next step

8. Select your 529 saving plan name and enter your 529 saving plan account number/
 - Many 529 Savings Plans can be used to make payments on the website, but not all 529 vendors and/or plans are currently supported.



Payment amount
\$3,074

* Payment method [Change](#)

New 529 Savings Plan

Many 529 savings plans can be used to make payments on this website but not all 529 vendors and/or plans are currently supported. Your 529 vendor may also assess a service fee.

* 529 savings plan name
Select...

* 529 savings plan account number

11 characters

529 service fee
\$10.00

This fee will be deducted from your 529 plan account in addition to the requested withdrawal amount

☐ Save 529 savings plan for future use

9. Read, understand, and agree to the terms and conditions.
10. Click on the '**Continue**' button to connect to the 529 savings plan website.

11. Log into the 529 Savings Plan account.

529 savings plan terms and conditions

There is a 529 service fee associated with this payment method which will be deducted from your 529 plan account in addition to the requested withdrawal amount. If you set up a recurring payment plan, the 529 service fee will only be deducted the first time you make a payment from your 529 plan account. Using this 529 account payment method is an optional service. For additional 529 payment options, please visit your 529 plan's website.

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

Click on continue and you will be redirected to the 529 savings plan website where you will be asked to log in with your 529 savings plan account username and password.

After logging in, you will be able to review your account balance and choose to pay with your 529 savings plan or cancel to return and select a different payment method.

Only payments that are equal to or less than 90% of your 529 savings plan account balance will be permitted.

529 savings plan

Placeholder money

Username
Test123

Password

[Forgot password?](#)

Important Legal Info | Business Community Plan | Privacy Policy
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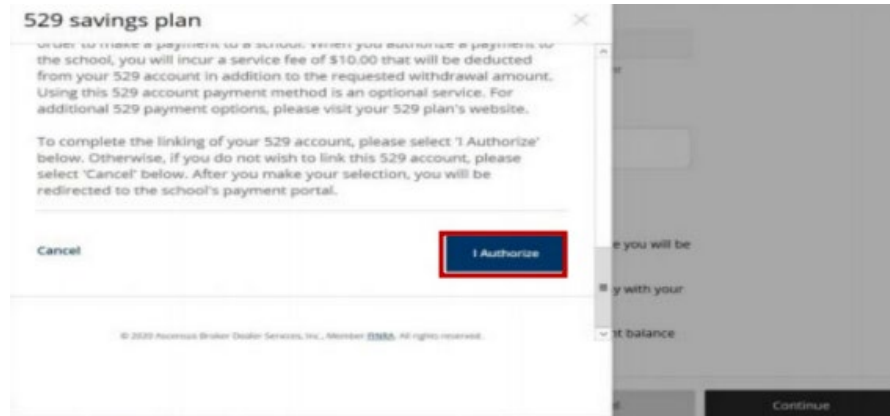
Student Business Services

Marin Hall – First Floor

Phone: (805) 437-8810

Email: sbs@csuci.edu

12. Finish connecting your 529 Account.
13. Click on the 'I Authorize' button to continue.



14. The 529 Savings Plan processor charges a \$10 service fee.
 - Your 529 vendor may also assess a service fee.

15. If you agree to pay the fee, click on the 'Continue' button to complete the transaction.

