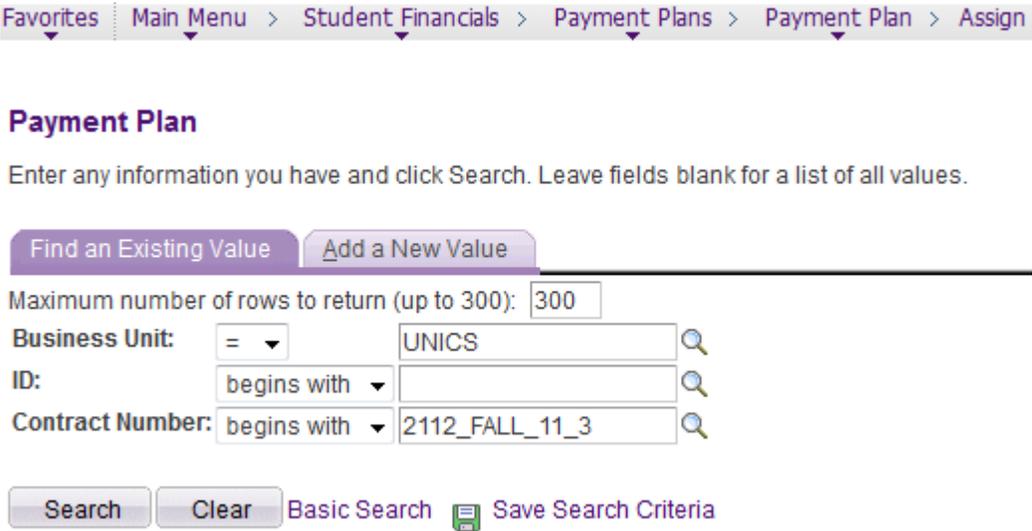
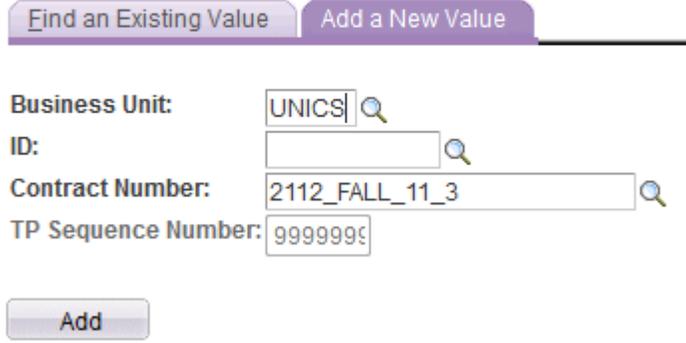
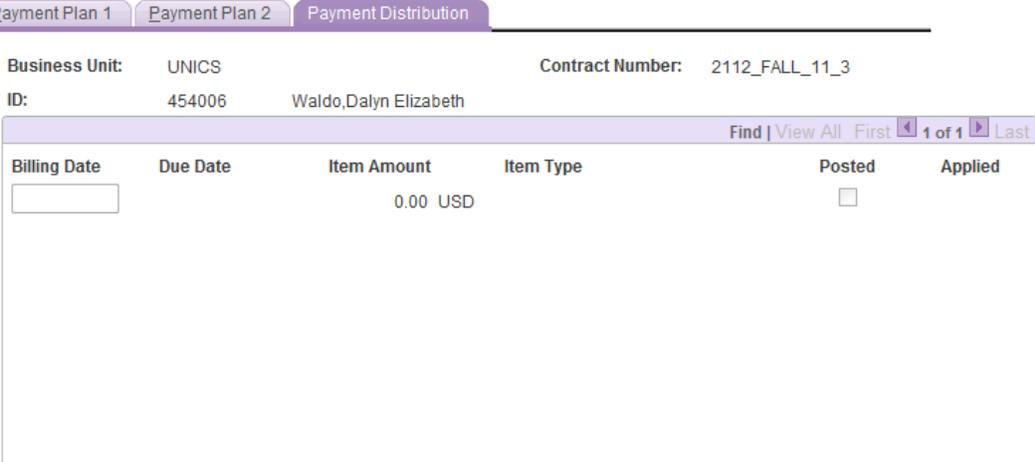


Assigning a Student Payment Plan to an Account

Purpose: To link the payment plan to a student, use the pages in the **Assign Payment Plan** component. The following instructions describe how to assign an existing payment plan (3 or 5 month) to an individual student.

Step	Action
1.	<p>Navigate to Assign: Select Main Menu > Student Financials > Payment Plans > Payment Plan > Assign</p> 
2.	<p>Click the Add a New Value tab.</p> 
3.	<p>Enter the student's id in the ID field. Click the Add button.</p>

Step	Action																		
4.	<p>Use the Payment Plan 1 page to confirm or modify the student payment plan information for the student.</p> <div data-bbox="354 430 1404 892" style="border: 1px solid black; padding: 5px;"> <p>Payment Plan 1 Payment Plan 2 Payment Distribution</p> <p>Business Unit: UNICS Contract Number: 2112_FALL_11_3 ID: 454006 Waldo,Dalyn Elizabeth Plan Type: Calculated Maximum Amount: 5,000.00 USD Lump Sum Amount: USD Item Type Group: TUITONLY Offset Item Type Group: TUITONLY</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;"> Term From: 2112 2011 FALL To: 2113 2012 SPRG </td> <td style="width: 33%;"> Charge Date Add: 08/22/2011 Adjust: 12/31/2011 </td> <td style="width: 33%;"> Anticipated Aid Term/Date From: 2112 2011 FALL To: 2113 2012 SPRG Anticipated Aid Date: 08/01/2011 </td> </tr> <tr> <td> Offset Term From: 2112 2011 FALL To: 2113 2012 SPRG </td> <td> Charge Offset Date Add: 08/22/2011 Adjust: 09/15/2011 </td> <td> <input checked="" type="checkbox"/> Calculate Real Time </td> </tr> </table> </div> <p><i>Note:</i> All of the values populating the fields on this page are default values from the contract setup pages. You can override values in any fields that are available, but cannot exceed the limits established when you set up the contract.</p>	Term From: 2112 2011 FALL To: 2113 2012 SPRG	Charge Date Add: 08/22/2011 Adjust: 12/31/2011	Anticipated Aid Term/Date From: 2112 2011 FALL To: 2113 2012 SPRG Anticipated Aid Date: 08/01/2011	Offset Term From: 2112 2011 FALL To: 2113 2012 SPRG	Charge Offset Date Add: 08/22/2011 Adjust: 09/15/2011	<input checked="" type="checkbox"/> Calculate Real Time												
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5.	<p>Click the Payment Plan 2 tab. Use the Payment Plan 2 page to continue to confirm or modify the additional student payment plan contract parameters.</p> <div data-bbox="354 1134 1416 1686" style="border: 1px solid black; padding: 5px;"> <p>Payment Plan 1 Payment Plan 2 Payment Distribution</p> <p>Business Unit: UNICS Contract Number: 2112_FALL_11_3 ID: 454006 Waldo,Dalyn Elizabeth Plan Type: Calculated First Bill Date: 05/20/2011 Billing Cycle: Monthly Post Payments: 3 Pay Plan Type: Credit Original Account Display Error/Warning Amount: 0.00 USD Account Type: PPA Reference Number: Due after Days: 15 <input type="checkbox"/> Waive Fee Adjustment Option: Adjust Equally Status: Active Plan Type Payroll Deduction:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%;">Item Type:</td> <td style="width: 25%;">200000008080</td> <td style="width: 50%;">Athletic Training-Activity Fee</td> </tr> <tr> <td>Pay Item Type:</td> <td>700000000010</td> <td>Payment-Check</td> </tr> </table> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <thead> <tr> <th style="width: 25%;">Account Number</th> <th style="width: 25%;">Item Term</th> <th style="width: 25%;">Item Type</th> <th style="width: 10%;">Item Amount</th> <th style="width: 15%;">Balance</th> <th style="width: 10%;">Reverse</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td style="text-align: center;">0.00</td> <td style="text-align: center;">0.00 USD</td> <td></td> </tr> </tbody> </table> </div>	Item Type:	200000008080	Athletic Training-Activity Fee	Pay Item Type:	700000000010	Payment-Check	Account Number	Item Term	Item Type	Item Amount	Balance	Reverse				0.00	0.00 USD	
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			0.00	0.00 USD															

Step	Action
6.	<p>Click the <i>Payment Distribution</i> tab. You can review and adjust billing dates and installment amounts on the <i>Payment Distribution</i> page.</p> 
7.	<p>On the <i>Payment Plan 2</i> tab, click the Post button to post each of the scheduled payments and plan fees to the student's account.</p> <p>Click the Post button.</p> 