

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.	Navigate to Assign: Select Main Menu > Student Financials > Payment Plans > Payment Plan > Assign			
	Favorites Main Menu > Student Financials > Payment Plans > Payment Plan > Assign			
	Payment Plan			
	Enter any information you have and click Search. Leave fields blank for a list of all values.			
	Find an Existing Value Add a New Value			
	Maximum number of rows to return (up to 300): 300			
	Business Unit: = - UNICS			
	ID: begins with 👻			
	Contract Number: begins with - 2112_FALL_11_3			
	Search Clear Basic Search 📄 Save Search Criteria			
2.	Click the Add a New Value tab.			
	Payment Plan			
	Find an Existing Value Add a New Value			
	Business Unit: UNICS			
	ID:			
	Contract Number: 2112_FALL_11_3			
	TP Sequence Number: 9999995			
	Add			
3.	Enter the student's id in the ID field. Click the Add button.			

Step	Action					
4.	Use the Payment Plan 1 page to confirm or modify the student payment plan information for the student.					
	Payment Plan 1 Payment Plan 2 Payment Distribution					
	Business Unit: UNICS Contract Number: 2112_FALL_11_3					
	ID: 454006 Waldo,D	alyn Elizabeth	Plan Type:	Calculated		
	Maximum Amount: 5,000.00 USD Lump Sum Amo			nt:	USD	
	Item Type Group: TUITONLY Q Offset Item Type Group: TUITONLY Q			Q		
	Term	Charge Date		Anticipated Aid	Term/Date	
	From: 2112 Q 2011 FALL	Add:	08/22/2011	From:	2112 Q 2011 FALL	
	To: 2113 Q 2012 SPRG	Adjust:	12/31/2011 🛐	To:	2113 Q 2012 SPRG	
	Offset Term	Charge Offset Date	e	Anticipated Aid	08/01/2011 🛐	
	From: 2112 Q 2011 FALL	Add:	08/22/2011	Dutor		
	To: 2113 Q 2012 SPRG	Adjust:	09/15/2011 🛐	Calculate Re	al Time	
	Note: All of the values popu	lating the fie	olds on this na	ge are defau	It values from	
	the contract setup pages. Yo	ii an overric	le values in ar	y fields that	are available	
	but cannot exceed the limits	established v	when you set	up the contra	act.	
5.	Click the <i>Payment Plan 2</i> tab. Use the <i>Payment Plan 2</i> page to continue to confirm or modify the additional student payment plan contract parameters.					
	Payment Plan 1 Payment Plan 2 Pay	ment <u>D</u> istribution				
	Business Unit: UNICS		Contract Number: 2	2112_FALL_11_3		
	ID: 454006 Wald	do,Dalyn Elizabeth	Plan Type:	Calculated		
	First Bill Date: 05/20/2011		Billing Cycle:	Ionthly	Post	
	Payments: 3		Pay Plan Type: (Credit Original Accou	nt Display Error/Warning	
	Amount: 0.	00 USD	Account Type:	PPA		
	Reference Number:		Due after Days:	15 [Waive Fee	
	Adjustment Option: Adjust Equally	•	Item Type: 2	00000008080	Athletic Training-Activity Fee	
	Status: Active 👻					
	Plan Type Pavroll Deduction:		Pay Item Type: 7	700000000010 F	Payment-Check	
	Find View All First 1 of 1 D Last					
	Account Number Item Term	Item Type	I	tem Amount	Balance Reverse	
				0.00	0.00 USD	



Step	Action
6.	Click the <i>Payment Distribution</i> tab. You can review and adjust billing dates and installment amounts on the <i>Payment Distribution</i> page. Payment Plan 1 Payment Plan 2 Payment Distribution
	Business Unit: UNICS Contract Number: 2112_FALL_11_3 ID: 454006 Waldo,Dalyn Elizabeth
	Find View All First 🗹 1 of 1 🕨 Last
	Billing Date Due Date Item Amount Item Type Posted Applied
	0.00 USD
7.	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. Click the Post button.