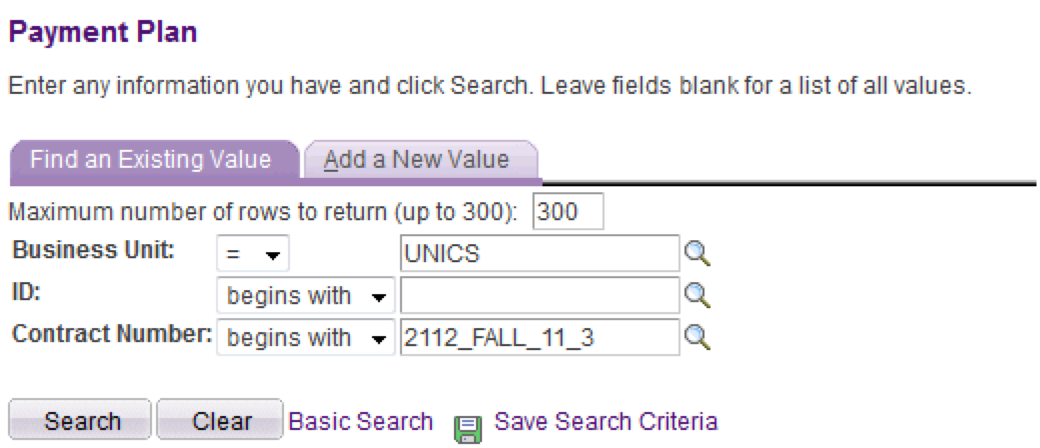
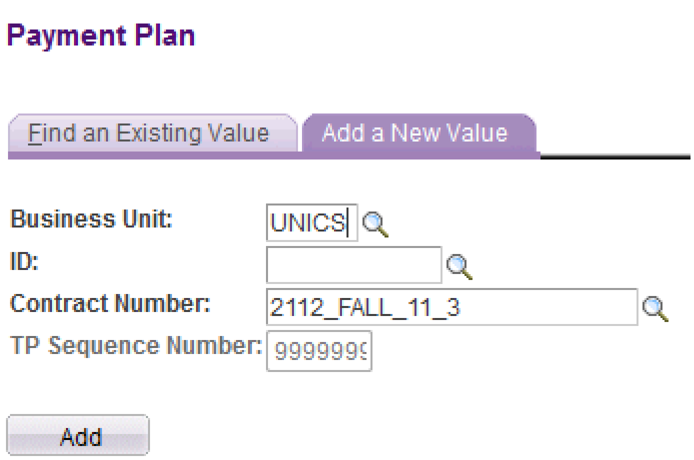
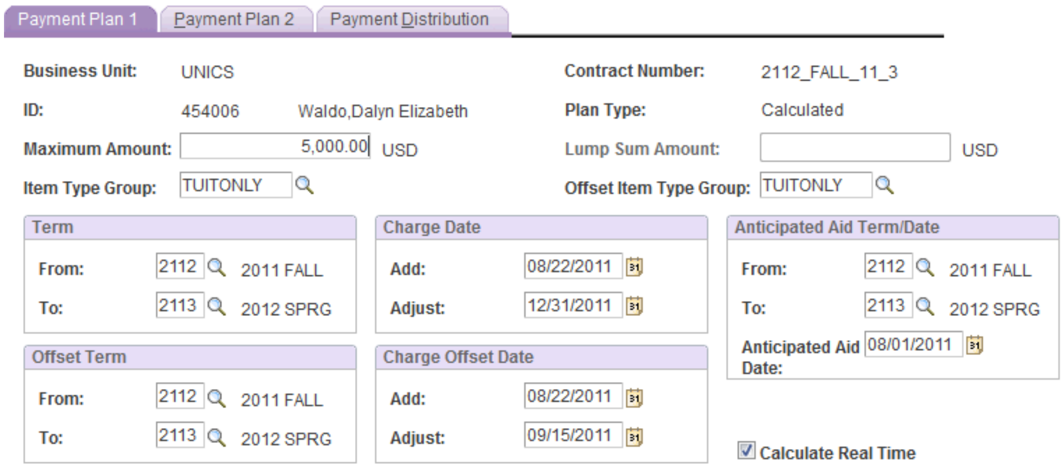
Assigning a Student Payment Plan to an Account

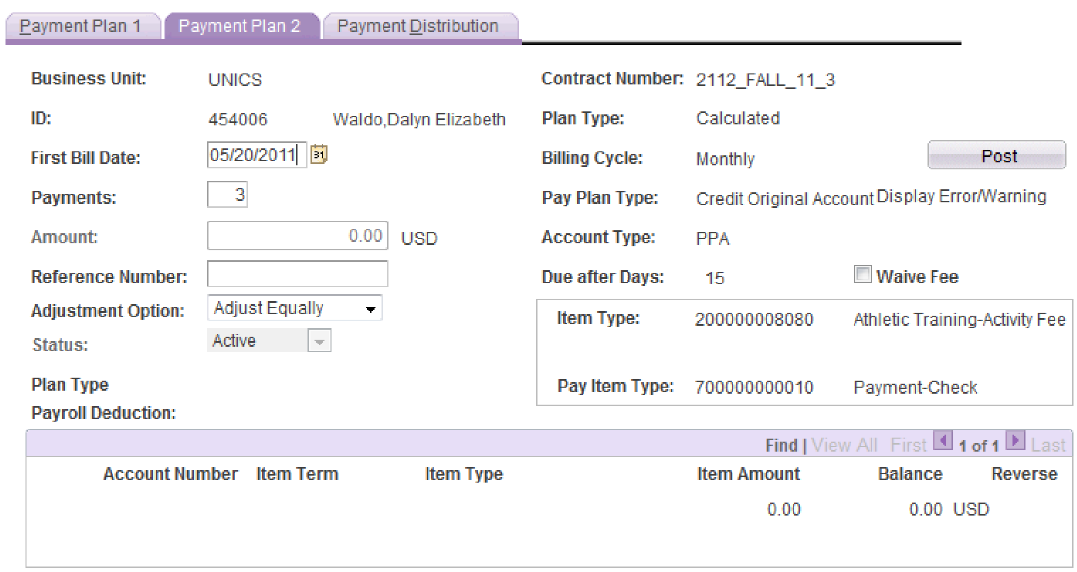
Purpose: To link the payment plan to a student, use the pages in the **Assign Payment Plan** component. The following instructions describe how to assign an existing payment plan (3 or 5 month) to an individual student.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Navigate to Assign: Select Main Menu > Student Financials > Payment Plans > Payment Plan > Assign


</td></tr>
<tr><td>2.</td><td>Click the Add a New Value tab.


</td></tr>
<tr><td>3.</td><td>Enter the student's id in the ID field. Click the Add button.</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4.</td><td>Use the Payment Plan 1 page to confirm or modify the student payment plan information for the student.


Note: 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.</td></tr>
<tr><td>5.</td><td>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.


</td></tr>
</table>

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<tr><td>6.</td><td>

Click the ***Payment Distribution*** tab. You can review and adjust billing dates and installment amounts on the ***Payment Distribution*** page.

</td></tr>
<tr><td>7.</td><td>

On the ***Payment Plan 2*** tab, click the **Post** button to post each of the scheduled payments and plan fees to the student's account.

Click the **Post** button.

</td></tr>
</table>