

Changing the Plan Owner

This page applies to the Enterprise Payment Platform. If you are looking for QuikPay or Commerce Manager, View the [QuikPay](#) section.

In Enterprise, the student has the ability to invite an authorized party to take over responsibility for the payment plan. As the new person completes the steps to accept ownership of the plan, we call this a change in plan owner. The new plan owner will be responsible for all remaining payments on the payment plan.

Why would the student want to change the plan owner?

- The student needs to change their financial account, but they are not a signer on the new account.
- A family member or friend has offered to make the payments for the term.

Student's steps to invite someone to become the plan owner

Step 1: Request a New Plan Owner

Sign in and begin the process by selecting **Request a New Plan Owner** from the Payment Plan **Actions** menu.

The screenshot displays the 'Payment Activity' section for Tracy Smith (ID: 1179). It shows a current balance of \$3,300.00 and a 'Make a Payment' button. Below this, a table lists the payment plan details for 'SPRING 20XX' with an amount due of \$3,300.00. An 'Actions' dropdown menu is open, highlighting the 'Request a New Plan Owner' option with a red border.

SPRING 20XX	AMOUNT DUE
Payment Plan (101 042 001)	\$3,300.00

Step 2: Make Authorized Party selection

Only authorized parties can take over the payment plan. Choose from the existing Authorized Parties listed and click **Save**. If a new authorized party is needed, the student can click [Add Authorized Party](#).



Note

In order to take over the payments, the authorized party must have been previously granted **online access** by the student. If the authorized party has not been granted online access, they will not appear on this list. The student will need to select **Don't see the authorized party you're looking for?** and will then have the ability to edit an existing authorized party's access. To grant online access they will need to add an email address.

Request A New Plan Owner

Spring 20XX - ABC College
Payment Plan (101 042 001) - \$3,300.00
Plan Owned by Tracy Smith

Available Plan Owners

Jason Smith

[Add Authorized Party](#)

Payment Plan Responsibility

The selected party must complete the plan owner change before you are no longer responsible for the payment plan. Until the plan owner change has been completed, you will still be responsible for scheduled payments.

[Cancel](#)

[Save](#)

Within minutes of saving, the authorized party should receive an email inviting them to take over the payments (become the plan owner).

ABC College

Payment Plan Invitation

Spring 2020
Tracy Smith
Customer #: 1000665438
Agreement #: 101042001
Student ID: 1179
Registration Code: BLN2D1H

Jason Smith:

Tracy Smith has requested that you take over payments for the Spring 2020 payment plan.

Go to Nelnet Campus Commerce, and you will be directed through the process.

[Take over Payments](#)

Thank you,
ABC College

Si usted tiene preguntas sobre esta correspondencia,
llame al Servicio al cliente (800)609-8056.

Please do not reply to this automated message. The mailbox is not monitored.




Authorized Party's steps to become the plan owner

Sign in or Create an Account

After clicking **Take over Payments** in the email invite, they will be prompted to sign in or create a new Nelnet account.

Step 1: Plan Information

The authorized party will review the plan information, elect email payment reminders if desired and click **Next**.

Home My Profile Financial Accounts   Signed in as John 

Change Plan Owner

Mary Smith #5001670966

1 Plan Information 2 Payment Method 3 Thank You

Plan Information

Spring 20XX - Sample Institution
Payment Plan (101 090 242) - \$4,000.00
Plan Owned by Mary Smith

Payment Schedule

DUE DATE	DESCRIPTION	AMOUNT DUE
11 Mar 20XX	Payment	\$1,000.00
10 Apr 20XX	Payment	\$1,000.00
10 May 20XX	Payment	\$1,000.00
10 Jun 20XX	Payment	\$1,000.00




Please send me e-mail payment reminders [Details](#)

Use e-mail for correspondence

[Cancel](#) [Next - Payment Method](#)

Step 2: Payment Method

The authorized party will select from a stored financial account or add a new account (options for bank account and credit card vary based on school configuration) and then click **I Agree**.

Home My Profile Financial Accounts   Signed in as John 

Change Plan Owner

Mary Smith #5001670966

1 Plan Information 2 **Payment Method** 3 Thank You

Payment Method

Test Bank ending in 4340
or [Add a New Account](#)

Payment Schedule

DUE DATE	DESCRIPTION	AMOUNT DUE
11 Mar 20XX	Payment	\$1,000.00
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10 May 20XX	Payment	\$1,000.00
10 Jun 20XX	Payment	\$1,000.00

Terms and Conditions

By clicking the I Agree button, you agree to the terms and conditions and that you will be financially responsible for this payment plan.
[View Terms and Conditions](#)

[Cancel](#) **I Agree**

Step 3: Thank You


After selecting **I Agree**, a Thank You message will be displayed, confirming the financial responsibility has been transferred.


Home My Profile Financial Accounts 🔔 🔒 Signed in as John 👤

Change Plan Owner

Mary Smith #5001670966

1 Plan Information 2 Payment Method 3 Thank You

 Print

 **Thank You**

Financial responsibility of payment plan 101 090 242 has been successfully transferred from Mary Smith to John Smith.
You agreed to the terms and conditions on 20 Feb 20XX.

[Proceed to Home](#)

Plan Information
Spring 20XX - Sample Institution
Payment Plan (101 090 242) - \$4,000.00

Payment Schedule

DUE DATE	DESCRIPTION	AMOUNT DUE
11 Mar 20XX	Payment	\$1,000.00
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Please send me e-mail payment reminders
 Use e-mail for correspondence

Terms and Conditions
TERMS AND CONDITIONS: Nelnet Campus Commerce (Nelnet) Lincoln, Nebraska has contracted with Sample School (Institution) to process payments for tuition and/or fees. This Nelnet Agreement (Agreement) is independent of any tuition agreement you may have with the Institution. The status of this Agreement in no way affects your obligation to pay the Institution. **As the person who submitted this Agreement, you are the Plan Owner. You accept and agree to be bound by the Agreement's terms and conditions until the total amount owed is paid in full.**

Confirmation of change notifications

An email will be sent to both the student and authorized party to let them know that the plan owner has changed. The message content is the same for both.

Sample School
New Payment Plan Owner

Spring 20XX
Mary Smith
Customer #: 5001670966
Agreement #: 101090242

Mary Smith:

John Smith has taken over financial responsibility from Mary Smith on the payment plan.

Thank you,
Nelnet Campus Commerce

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llame al Servicio al cliente (800)609-8056.

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