Student Experience: Consumer Entered Payment Plan Setup

This page applies to the Enterprise Payment Platform. If you are looking for QuikPay or Commerce Manager, View the **QuikPay** section.

Overview

With Consumer Entered online payment plan setup, the student is given the most flexibility with their plan. This option allows the student to choose the amount of their payment plan. Although this option provides the most flexibility, there are additional configurations that help control the amounts that can be entered.

Viewing your payment plan site in Evaluation Mode

There are several configurations and customizations that make your online payment plan site unique to your school. We provide a way for you to view your specific site in an evaluation mode so that you can view each step without the system actually creating a live payment plan. For more information, see **Viewing Your Online Payment Plan Site in Evaluation Mode**. This will not allow you to preview an upcoming term. It can only be utilized for a live term.

In the remaining sections of this article, the basic steps are outlined from the perspective of a student setting up a new payment plan. Keep in mind that the options listed are for sample purposes and your configurations may vary from the ones discussed.
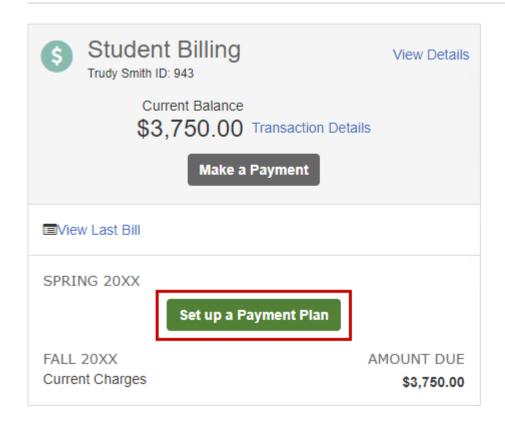
Signing in

There are several ways to access the system based on your schools configurations:

Pass-through authentication or Single Sign On (SSO): Student information is prefilled; the user will still need to create a pin and security questions.

Student Entered: User can access Enterprise directly or via a specific link provided by school. To see this experience, go to **Creating a User Account**.

Home page

From the home page, the student will click **Set up a Payment Plan**.

Welcome

The text on this screen can be customized by the institution.

- Text size and color can be modified.
- Keep the message brief.
- Include contact information for questions.

From this point forward, the customer has access to **Live Help** via our chat feature on the top right corner of the screen. This option is available Monday-Friday from 8-5 Central Time.

Contact Information

The student will have the opportunity to review their personal information and make changes as needed. In addition, the student can opt-in for email payment reminders.

Amount Due

- The text displayed on this screen can be customized by the institution.
- **Charges (title can be defined by institution):**
  - Custom text is provided by the institution
  - If the institution has a tuition schedule on the institution website, a link to the table can be provided.
  - The institution determines which institution accounts are displayed (tuition, fees, etc.).
  - The institution can set default amounts for each institution account and determine whether the student can edit

the amounts.

- ◦ The institution can set minimum amounts for each institution account.
- **Credits (title can be defined by institution):**
  - ◦ The institution determines whether or not students can enter credits – this section will not display if credits are not allowed.
  - ◦ Custom text is provided by the institution.
  - ◦ The institution chooses the adjustment reasons (financial aid).

Payment Plan Options

All of the payment plans that are available at the time the student signs up will be listed.

- Use the **Show:** drop-down menu on the right to limit the plans displayed
- Select a payment plan
  - ◦ If additional fees apply to a specific plan, that information is listed under the plan name.
  - ◦ If custom text was added to a plan, it is displayed under the plan name.
  - ◦ Plans that have down payments will have an additional column with the amount due – the dollar amount is a link to the details.
- Click **Next**
- A warning will be displayed to remind the student if there is a Nelnet Enrollment Fee for the plan selected

Payment Details

The options available are dependent on the payment methods your institution offers. A warning box may appear if you are offering a credit card program where the consumer may pay additional fees.

- The person listed as the Plan Owner must be a signer on the financial account provided.
- Once the financial account has been entered, additional insurance options may be displayed, if applicable.
- If a **Down Payment** is required, information about the **Amount Due Today** is listed.
  - ◦ A **View Details** link will be displayed to see information about the down payment.
- Click **Next.**

Payment Schedule

If multiple payment dates are offered, the student will select from the drop-down list. This will populate the future payment schedule below.

Review & Authorize

- **Change** links allow the user to edit the information entered during payment plan setup.
- The student must check the box to agree to the **Terms & Conditions.**
- Clicking **Authorize** finalizes the agreement.

Thank You

- Click **Print** to save a copy.
- Click **Done** to navigate to the user account.

User Account

From the user account, the student can click **View Details** to see schedule, balance, and payment activity. They can also manage their personal information.