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Overview

This business process guide demonstrates you how to create online payment plans.
Create Resident/Non-Resident Payment Plans

Navigate to Student Financials > Payment Plans > Create Payment Plan

The Payment Plan Contract page displays.

1. Click the Add a New Value tab
2. Enter Business Unit: HW001
3. Enter Contract Number (In our example, it is RESIDENT FALL 2010)
4. Click Add

Before you begin, determine your payment dates and follow the examples to fill in the correct information.

Our bill dates are the first of each month. Use the first bill date before the first payment is due. For Example: If payment is due December 10th, the first bill date is December 1st and the Payment due days is 9.
The Payment Plan 1 page displays.

5. Enter **Description**: RESIDENT FALL 2010

6. Enter **Short Description**: RESFALL10

7. Enter **Long Description**: RESIDENT FALL 2010 PAYMENT PLAN

8. Select **Pay Plan Type**: Credit Original Account

9. Select **Status**: Active

10. Enter **Total Budget Amt**: 5,000.00

11. Enter **First Bill Date**: 09/01/2010 (This date is always the 1st day of the month of the 1st payment deadline)

12. Enter **Payment Due Days**: 14

13. Enter **Number Of Payment**: 3

14. Enter **Term**: 2104

15. Enter **Last Date**: 01/01/2500

16. Enter **Billing Cycle**: Monthly

17. Click the **Payment Plan 2** tab
The Payment Plan 2 page displays.

18. Select **Plan Type**: Calculated

19. Enter **Maximum Amount**: 5,000.00

20. Enter **Item Type Group**: RESREGFEES

21. Enter **Offset Item Type Group**: PPLOFFSET

Under Term and Offset Term sections:

22. Enter **From**: 2104

23. Enter **To**: 2104

Under Charge Date and Charge Offset Date sections:

24. Enter **Add**: 01/01/2008

25. Enter **Adjust**: 01/01/2500

26. Click the **Payment Plan Item Type** tab

The Payment Plan Item Type page displays.

27. Select **Adjustment Option**: Adjust Last Bill

28. Select **Extra Payment Options**: First Bill

29. Enter **Account Type**: PPL

30. Enter **Charge Item Type**: 600000001010

31. Enter **Payment Item Type**: 650000000010

32. Click the **Payment Plan Fee** tab
The Payment Plan Contract page displays.

33. Enter **Type of Assessment**: Payment Plan Fee

34. Enter **Payment Plan Fee**: 30.00

35. Enter **Assessment Fee Split**: Add to first payment

36. Enter **Assessment Item Type**: 600000000010

37. Click **Save**
Setup the Payment Plan to be Seen by Students through Student Center

Navigate to East Bay SA > Student Financials > SS Payment Plan Setup

The Payment Plan Self Serv Setup page displays.

1. Enter Business Unit: HW001
2. Enter Contact Number: RESIDENT
3. Click Search

The Search Results page displays.

4. Select the current resident plan
The Payment Plan Self-Serv Setup page displays.

5. Check the “Allow Self Service Enrollment” box

Note: This must be checked for a payment plan to display in Self-Service.

6. Enter Service Indicator Cd: S05
7. Enter Service Ind Reason Code: NOIPP

Note: Use the “S05” service indicator code and the “NOIPP” reason code. If a student has this service indicator code and reason on the account, they will not be able to assign themselves to a payment plan through Student Center.

8. Enter Self Service Start Date
9. Enter Self Service End Date

Note: The Self Service Start and End dates determine when the plan will appear in Student Center.

10. Click Save

Navigate to East Bay SA > Student Financials > SS Payment Plan Setup

The Payment Plan Self Serv Setup page displays.

11. Click the Search button to locate the NON resident plan that should be displayed through Student Center
12. Check the “Allow Self Service Enrollment” box

*Note: This must be checked for a payment plan to display in Self-Service.*

13. Check the “Check Residency” box

*Note: This field is only checked on the Non-Resident Tuition Payment Plan.*

14. Enter **Service Indicator Cd**: S05

15. Enter **Service Ind Reason Code**: NOIPP

*Note: Use the “S05” service indicator code and the “NOIPP” reason code. If a student has this service indicator code and reason on the account, they will not be able to assign themselves to a payment plan through Student Center.*

16. Enter **Self Service Start Date**

17. Enter **Self Service End Date**

*Note: The Self Service Start and End dates determine when the plan will appear in Student Center.*

18. Click **Save**

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**Whom to Contact for Help?**

For additional help or to report problems with this functionality, please log a ticket via the [Service Desk](http://www.csueastbay.edu/servicedesk).