

Customer Experience: Institution Finalized Online Payment Plan Setup

Institution Finalized (Payer First) allows the customer to enter their personal information and select a payment plan. Once submitted, an institution user will enter the transactions and finalize the agreement.

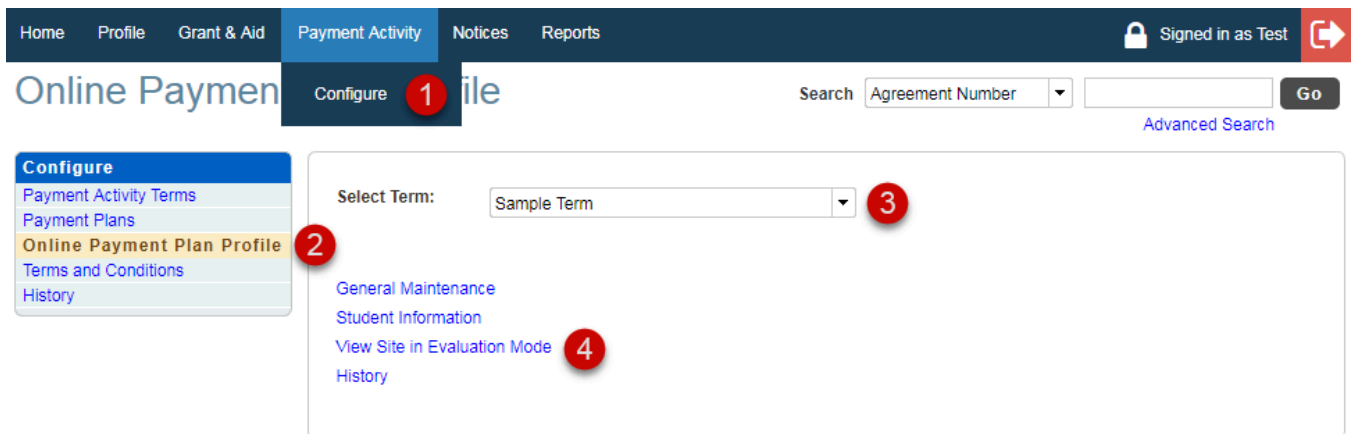
Viewing your online payment plan site in Evaluation Mode

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](#).

In the remaining sections of this article, the basic steps are outlined from the perspective of a customer 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.

Navigation

1. Select **Configure** from the **Payment Activity** menu.
2. Click **Online Payment Plan Profile** on the left side.
3. Choose a term if the correct term is not already showing.
4. Click **View Site in Evaluation Mode**.



Consumer View

Before a user can sign up for a payment plan, they must [Create a User Account](#). The contact information entered during that process will be used to populate the first step of setting up their payment plan.

Dashboard

From the dashboard, the customer will click **Set up a Payment Plan**.

Steps to setting up a payment plan



Premier Integration Users

If your school is using [Premier Integration](#), the customer will skip the 'Contact Information' and 'Students' steps as that information will have already populated from the SIS.

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 customer will have the opportunity to review their personal information and make changes as needed. This is the only opportunity they will have to **change the customer name**. It cannot be changed once the payment plan has been submitted.

In addition, the customer can update their correspondence preference. If you are storing a Customer ID, the customer may enter it on this screen.

Click **Next**.

Students

This section allows the user to enter records for each student that will be included in the payment plan. Custom text may be added to the Add Student screen.

- Click **Add Student**.
- Enter:
 - Student First and Last Name
 - Grade Level
 - Student ID (if configured)
- Click **Save**.

To enter additional student information, click **Add Student** again. When finished, click **Next**.

Payment Plan Options

All of the payment plans that are available when the customer signs up will be listed.

- The **Show**: drop-down list allows the user to limit the plans displayed.
- Select a payment plan:
 - When a fee or discount is applied for a specific payment plan, it is displayed under the plan name.
 - If custom text was added to a payment plan, it is displayed under the plan name.
 - When a down payment is required, the link will show more information about what may be included in the amount.
- Click **Next**.
- A warning will be displayed to remind the customer that there is a FACTS Enrollment Fee for the plan selected (if applicable).



Tip

If a plan is not showing, it may be that the last day to enroll for that plan or start date has passed. School users can add additional payment plan options by contacting FACTS.

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 customer 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 **Incidental Expenses** is offered, information about auto pay is displayed. When auto pay is optional, the customer can deselect the auto pay option.*

Payment Schedule

The customer will select a payment date from the drop-down menu. This will populate the future payment schedule below.

*If a **down payment** is required, information about the date of the down payment is disclosed at the bottom of the schedule.*

Review & Authorize

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

Thank You

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

User Account

The agreement will appear as **Pending** on the customer dashboard. They will not be able to view any balance information until the agreement has been finalized by the institution.

The screenshot shows a user account dashboard with a dark blue navigation bar at the top containing 'Home', 'My Profile', 'Financial Accounts', a notification bell, a lock icon, and 'Signed in as Sample' with a red arrow icon. Below the navigation bar, the user is greeted with 'Hello Sample'. The main content area is divided into two columns. The left column is titled 'Payment Plan & Billing' with a dollar sign icon and 'View Details' link. It shows 'Sample Customer #1002371654 For Sample Student' and 'Current Balance Pending'. Below this is a table with columns 'SCHOOL YEAR' and 'AMOUNT DUE'. The table has one row: 'Payment Plan (110 058 870)' with an 'Actions' dropdown and 'Pending' amount due. A blue callout box explains the 'Pending' status: 'Pending - This agreement is waiting to be finalized by the institution. After this agreement is finalized, a confirmation notice will be sent from us listing the amount owed and the payment schedule.' At the bottom of the left column is a 'Set up a Payment Plan' link. The right column is titled 'Sample Customer' with a person icon. It lists 'testaccount@gmail.com', a link to 'Register to receive text services on your mobile phone.', and a link to 'Add an Authorized Party' under the heading 'Want to allow a friend or family member to pay toward your balance?'. At the bottom of the right column is a link 'Have another activity you want to link?'.