Nelnet Payment Plan Management

1. Making a Payment prior to Scheduled Payment

Students now have the option to make a payment towards their balance prior to the scheduled payment.

User Account

When logged in to a user account, the user will be able to click Make A Payment to proceed.

Step 1 – Select a Payment

- Check the box(es) to the left of the payment(s) that will be paid
- The amount displayed in the Payment Amount box may be changed by the customer
  - Incidental invoices may not allow partial payments if the school chose not to allow them
- Up to 5 scheduled payments will be displayed – to view more, click Show All Payments
- Click Next

To pay the balance in full, click Show All Payments and check all boxes, then click Next.
Step 2 – Select a Payment Method

- **Select your Payment Method:**
  - If logged in, choose from a stored account on file or enter a new account
    
    *The new account can be entered for a one-time use or saved to the customer record*
  - If not logged in, enter a new account

- **Total Amount:** The amount being paid today is displayed

- **Authorization:** Check to box to accept the terms and authorize the payment

- **IMPORTANT:** *Note the verbiage regarding returned online payments.*

If the customer has a valid email address on file, a payment confirmation is sent to that address. The customer can elect to have the same notice sent to up to 2 additional email addresses.

*When Confirm Payment is clicked, the payment has been submitted and cannot be changed or stopped.*
Step 3 – Confirmation

This page is a printable confirmation of the payment that was submitted.

Click Finish to leave the payment screen.

Sample Email Payment Confirmation

Test Customer:
The following payment was authorized and submitted on 11/21/2013.

Payment Date: 11/22/2013
Account Holder Name: Test Customer
Account: Regions 2968
Institution Payment Amount: $567.79

This is a one-time payment and cannot be cancelled.

If you have questions, contact FACTS Customer Service at (866)441-4637.

Thank you,
FACTS Management Company

Do NOT reply to this message. Replies will not be read.
2. **Change a Scheduled Payment to Another Date**

Students may elect to change one of their scheduled payments.

The student/parent will begin by clicking **Change** next to the due date they wish to adjust. Only one payment date may be changed at a time.

A box will appear with the available dates highlighted in bold. If your school has a limit on the number of deferrals, text will appear to notify the customer of how many are allowed and how many they have left. *Please Note: Currently, MMCC only allows one deferral per payment plan.*
3. Balance Adjustment to Payment Plan

Students may have to either increase or decrease the amount owed based on Financial Aid and/or Dropped/Added Courses.

The customer will begin by selecting Adjust on the right side of their dashboard.

![Payment Plan & Billing](image)

**Add Charges/Add Credits**

- The customer will select the account to adjust from the drop down menu. Only the accounts configured for this type of adjustment will appear in the menu.

**Balance**

- The customer will enter the amount of the charge or credit in the Adjustment Amount field.
- The customer will select from the adjustment reasons configured for this type of change.
- The Description field is optional, but allows the customer to provide more information about why they are making the adjustment.
- When selecting how to apply the amount to the schedule, only the options configured by the school will appear.
- When All Eligible Payments is selected, the system will allow the customer to select a beginning date. The next eligible payment date will be filled by default.

**Payment Schedule**

The remaining payment schedule is displayed with the current and new payment amounts. Each payment can be expanded for more detail. The new total balance is listed at the bottom of the screen.

The customer must click Apply to post the change.

*Please Note the example below lists reasons for adjustments that are not applicable to MMCC. MMCC’s Options will be Add Charges or Remove Charges.*
Balance Adjustment

Remaining Amount Due $3,200.00

Add Charges

Select the account you want to increase*  Athletics

Athletics Balance

Enter the amount(s) in the Adjustment Amount columns*

<table>
<thead>
<tr>
<th>Name</th>
<th>Account</th>
<th>Current Balance</th>
<th>Adjustment Amount*</th>
<th>New Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test Customer</td>
<td>Athletics</td>
<td>0.00</td>
<td>+50.00</td>
<td>50.00</td>
</tr>
</tbody>
</table>

Total Adjustment  +50.00  50.00

What is the reason for this adjustment?*  Fall Sports

Enter a description for this adjustment: Football

How would you like to apply this adjustment?*  All Eligible Payments

Beginning*  00/07/2013

Payment Schedule

<table>
<thead>
<tr>
<th>Date</th>
<th>Name - Account</th>
<th>Current Amount</th>
<th>Adjustment Amount*</th>
<th>New Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/07/2013</td>
<td></td>
<td>400.00</td>
<td>+6.25</td>
<td>406.25</td>
</tr>
<tr>
<td>11/05/2013</td>
<td></td>
<td>400.00</td>
<td>+6.25</td>
<td>406.25</td>
</tr>
<tr>
<td>12/05/2013</td>
<td></td>
<td>400.00</td>
<td>+6.25</td>
<td>406.25</td>
</tr>
<tr>
<td>01/05/2014</td>
<td></td>
<td>400.00</td>
<td>+6.25</td>
<td>406.25</td>
</tr>
<tr>
<td>02/05/2014</td>
<td></td>
<td>400.00</td>
<td>+6.25</td>
<td>406.25</td>
</tr>
<tr>
<td>03/05/2014</td>
<td></td>
<td>400.00</td>
<td>+6.25</td>
<td>406.25</td>
</tr>
<tr>
<td>04/05/2014</td>
<td></td>
<td>400.00</td>
<td>+6.25</td>
<td>406.25</td>
</tr>
<tr>
<td>05/05/2014</td>
<td></td>
<td>400.00</td>
<td>+6.25</td>
<td>406.25</td>
</tr>
</tbody>
</table>

Your total new balance will be $3,250.00

Apply  |  Cancel
4. Terminate Agreement with Nelnet

Students may need to terminate their Agreement with Nelnet due to various reasons, for example; A student just was awarded their Financial Aid and will now cover the balance of their Tuition/Fees on their account and no other payments are needed from the Nelnet Payment Plan any longer.

The customer will begin by clicking **Cancel Plan** in the status column of their payment plan.

A warning box will appear with either our default text, or the schools custom message. The customer must click **Cancel Payment Plan** to complete the change.