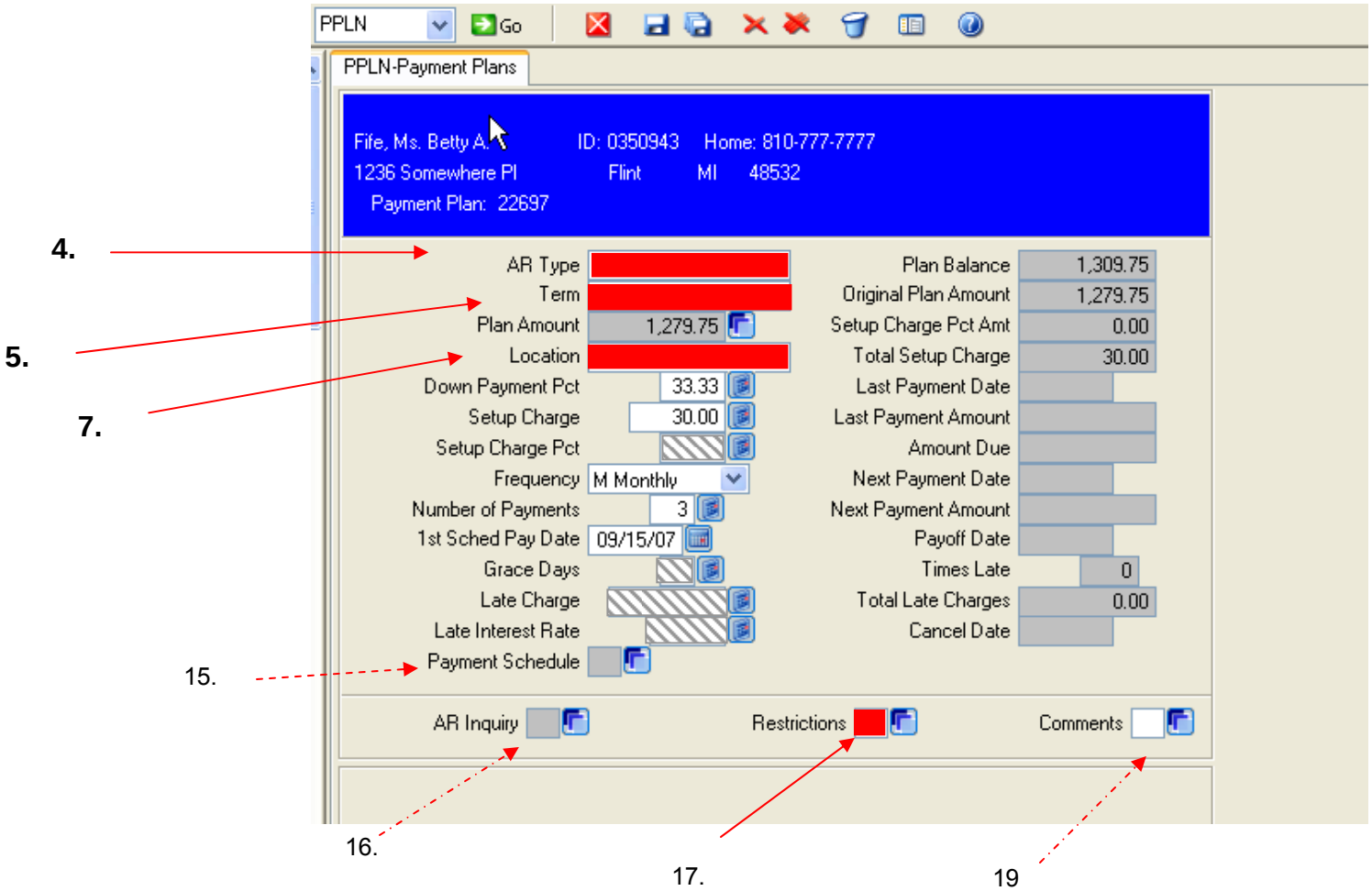
MOTT COMMUNITY COLLEGE
JOB AID

Student Payment Plan
PPLN

Table of Contents

Screen Overview , page 2
Summary Steps and Information, page 3
Screen Shortcuts and Guide Overview, page 4
Step-by-Step Instructions, page 5+



Required Field

Optional

All Fields Marked in Red MUST be filled in.

Field Not Used

Procedure Information:

Title: Creating a Payment Plan
Mnemonic: PPLN
File Name: JA_PPLN.ppt
Application: APPS-ST-AR-PLN-PPLN
Primary Dept: Academic Affairs
Effective Date: July 2, 2007
Revision Date:

Purpose:

Creating a payment plan for a registered student. On the RGN screen, when "Option #1 'is the chosen "method of pay" it will allow the registered student to set up a payment plan with the college to pay for his/her classes. On the student receipt, in the top left corner, it will tell the student to go to the cashiers office to set-up the payment plan.

Summary Steps

1. Login to **Datatel**. Click **APP**, then Click **ST**. Type **"PPLN"**, click **GO**.

2. **Enter** student name, or SS# or Datatel Id'.

3. **Payment Plan Lookup or Add**– Type " **A**" add if student is new to this semesters payment plan. [* Look-up format is allowed to see what semesters student owes payments, also].

4. AR Type – Allows for payment plan to be set-up for credit classes. Enter **STDRC**. This limits AR type invoices to Credit only. ►***AR type can not be changed once Payment Plan has been defined****

5. Term – Limits Payment Plan to exact term dates. Invoices from other terms or no term will not be part of this Payment Plan.
► ***Term can not be changed once Payment Plan has been defined***

6. Plan Amount – Auto fills Shows total amount of Payment Plan. If no Term is entered, total will default to all outstanding invoices. If no amount shows, student may already have payment plan

7. **Location -** Lookup is allowed **[type …] or** enter **MC** for main campus . Used to tract origin of Payment Plans

8. Down Payment Pct- Auto fills from parameters screen

9. Setup Charge – Dollar amount auto fills from parameters screen

10. Frequency – Auto fills from parameters screen. This is how often payment is expected.

11. Number of Payments – Auto fills from parameter screen. ► **Once a payment has been made, Number of Payments can not be changed****

12. 1st Sched Pay Date – **[College policy is that 1st payment is due when Payment Plan is set-up]** ► **Once a payment has been made, date can not be changed****

13. Grace Days – Not used by the college

14. Late Charge – Not used by college

15. Payment Schedule (optional) Detail on this field to view the schedule of dates and amounts of payment plan (PPLS) prior to finishing set up.

16. AR Inquiry – (optional) Jumps to the ARSI screen, Accounts Receivable Term Summary Inquiry to view student charges, credits, payments, and balance

17. Restrictions- Place term restriction code (PERC) here. PAYxx where XX is term of Payment Plan, e.g. PAY82 is Fall 2008/2

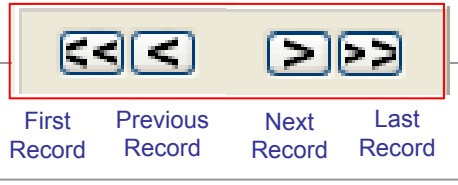
18. End Date: **College policy is three months from start date of semester regardless of when Payment Plan is established**

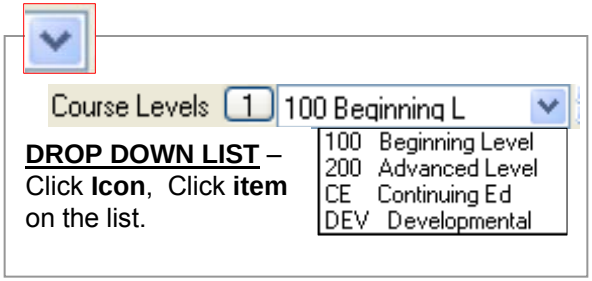
19. Comments – (optional) Free form entry, not used in Datatel reports

Using the Guide

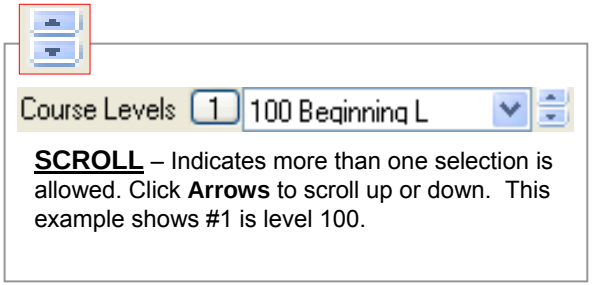
1. Actions are **Bold**.
2. Data to enter is ***"Italic"***.
   - Notes are bulleted.
     - Field Codes
3. Field Names are underlined.
4. Click means use the mouse.
5. Enter means use the keyboard.
6. Press means use the keyboard.

Task Bar

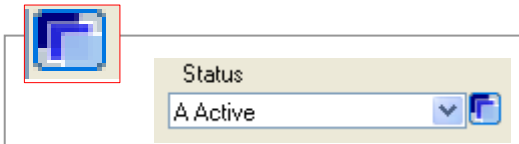




DROP DOWN LIST – Click **Icon**, Click **item** on the list.

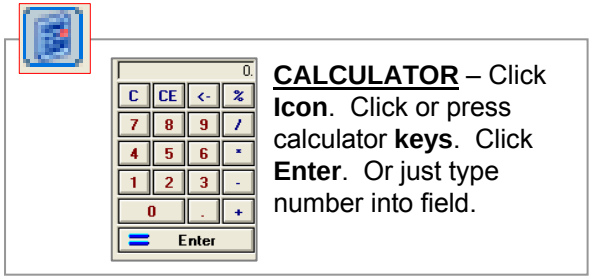


SCROLL – Indicates more than one selection is allowed. Click **Arrows** to scroll up or down. This example shows #1 is level 100.



DETAILS – Click **Icon** to open a new window to display or record more details for the field. When done, click **Save**.

CALENDAR – Click **Icon**. Click **Arrows** to scroll to month and year. Click **Date.** Or type the date *MMDDYY-**072106***.



CALCULATOR – Click **Icon**. Click or press calculator **keys**. Click **Enter**. Or just type number into field.

Original Function Keys

Shift >											
Process Help	Function Help	Window Insert	Window Page Jump	Window Back	Field Back	Element Back	Cancel	Exit	Refresh	Clear EOL	Screen Back
Field Help	Detail	Window Jump	Field Jump	Window FWD	Field FWD	Element FWD	Direct Access	Finish	Update	Screen Jump	Screen FWD
F1	F2	F3	F4	F5	F6	F7	F8	F9	F10	F11	F12

RGN-Registration | METHOD OF PAY ENTRY

Beach, Ms. Sandy T. ID: 0350945 Home: 810-772-7777
777 Heaven Lane Flint MI 48507

Tution and fees MUST be paid (or payment option secured) within 2 days.

0..Cash/Check/Credit Card
1..Payment Plan
2..Financial Aid
3..Employer/Agency Sponsored
4..UAW/GM
5..Mott Employee or Qualifying Dependant
6..Dual Enrollee/Gold Card
7..Apprentice Related (ARI)
8..College in the Workplace

Method of Payment for 2008/2 1

Print Map Y

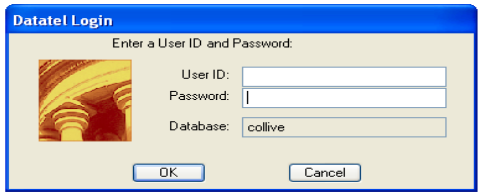
```
************  NOTICE  ****************
You must setup a payment plan in the
Cashiers Office with $481.08 down
payment plus $30, or your classes
will be DROPPED in 2 business days.

    REFUND SCHEDULE 2008/2 Fall 2007
Last day for  Full Refund    1/2 Refund
 15 Weeks      09/10/07       09/14/07
 First 1/2     09/10/07       09/14/07
 Second 1/2    10/31/07       11/05/07
 Fall 2        10/08/07       10/12/07

ID #: 0350945
      06/29/2007     10:44AM

Check out our new Web Registration at www.mcc.edu
You can now pay online.

          Sandy Beach
          777 Heaven Lane
          Flint MI 48507
```

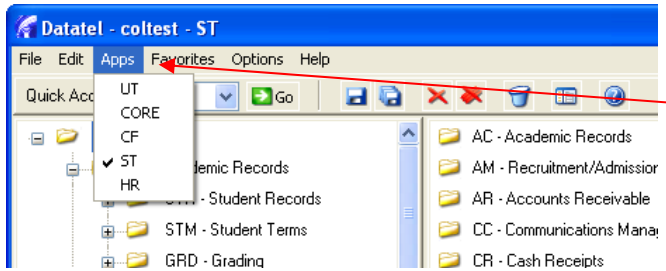
```
C.S. Mott Community College
1401 East Court Street
Flint, MI  48503

Registration: 810-762-0221
Fax.........: 810-762-5611
Credit Card.: 810-232-9151

Sandy Beach
ID #.....: 0350945
Residency: 1 In-District Credit Clas
Acad Pgms: CSCI1,RESP2
AR Type..: STDRC

06/29/2007     10:44AM

2008/2 - Fall 2007
Description                                Amount
-------------------------------------------------
2008/2 Charges:
  Tuition                               1,312.80
  Technology/Course Fees                   75.20
  Registration Fees (NON-REFUND)           31.50
  Stu Service Fees (NON-REFUND)            23.75
  Other                                     0.00
                                        ----------
Total 2008/2 Charges                    1,443.25

  Cash, Check & Credit Payments             0.00
  Financial Aid Transmitted                 0.00
  Amounts Paid by Sponsors                  0.00
  Other Payments                            0.00
                                        ----------
2008/2 Amount Due                       1,443.25
Other Term Balance(s)                       0.00
                                        ----------
TOTAL AMOUNT DUE                        1,443.25
```

Before setting up PPLN

Creating a payment plan for a *registered* student follows the last step from the RGN screens.

- Method of Pay: **Enter** option #1 Payment Plan
- Students receipt will have instructions in the top left corner under NOTICE, telling them to go to the Cashiers office to set-up their payment plan.

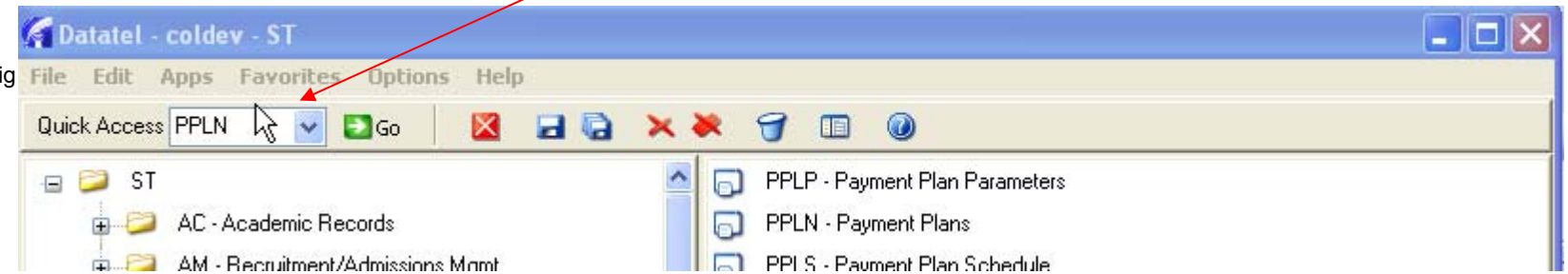


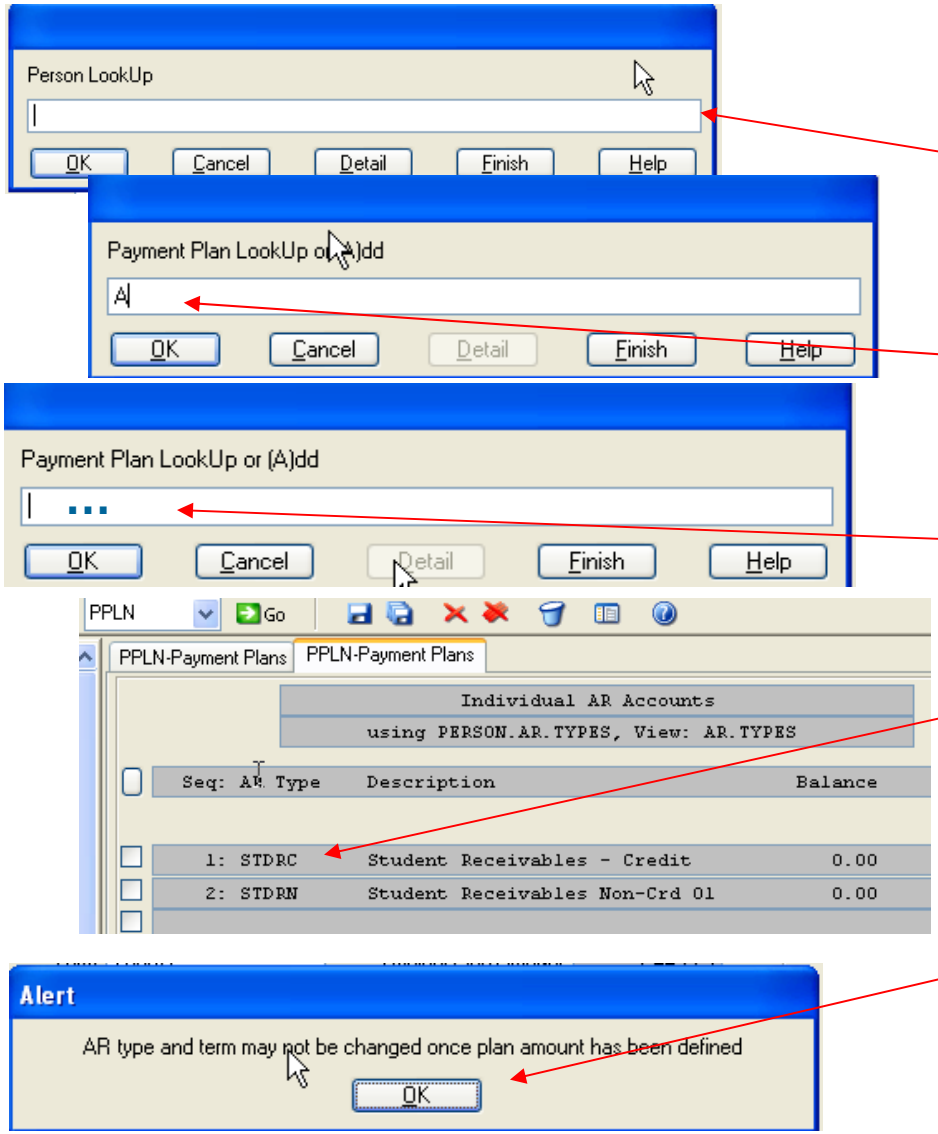


Step 1: Login to Datatel

1. **Double Click** on the **Datatel Icon.**
2. Enter your **"*User ID*"** and **"*Password*"**
   - Database should be [collive]
3. Click **OK.**
4. At the Datatel Menu Bar, Click on **Apps**
5. Click **ST**
6. In the Quick Access area, enter *PPLN*
7. Click **Go**

Fig





Step 2. **Enter** Student name or SS# or Datatel Id at prompt..

► **[@ sign will bring up last student id used]**

Step 3. **Enter** ***A*** for Add, unless student has already set up plan.

OR

Enter **. . .** to recall payment plan that has already been established

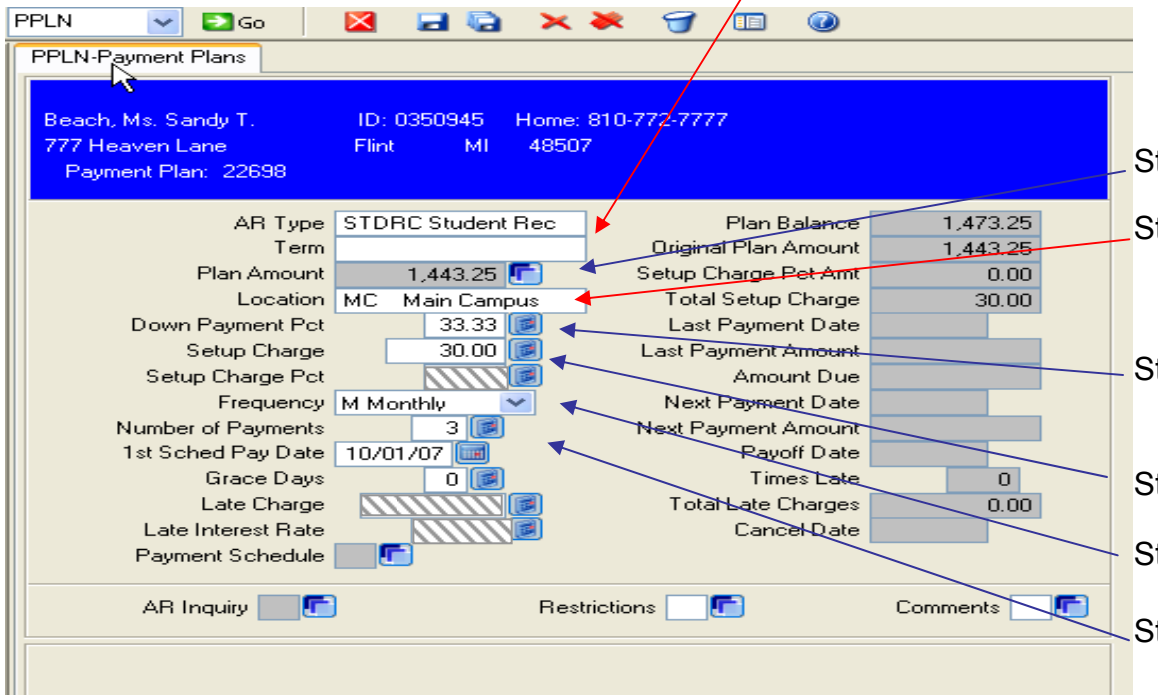
Step 4. AR Type: **Choose** from list presented **or Type** *STDRC* for credit classes

►Alert Box will appear after entering Term or AR Type

- Click **OK**

Step 5. **Term:** **Type** current term **[e.g. 2009/2]**

► **If no Term is entered, Payment Plan will apply to all outstanding invoices**



Step 6. Plan Amount auto fills

Step 7. Location – **Type** *MC* for Main Campus or use LookUp for list of codes

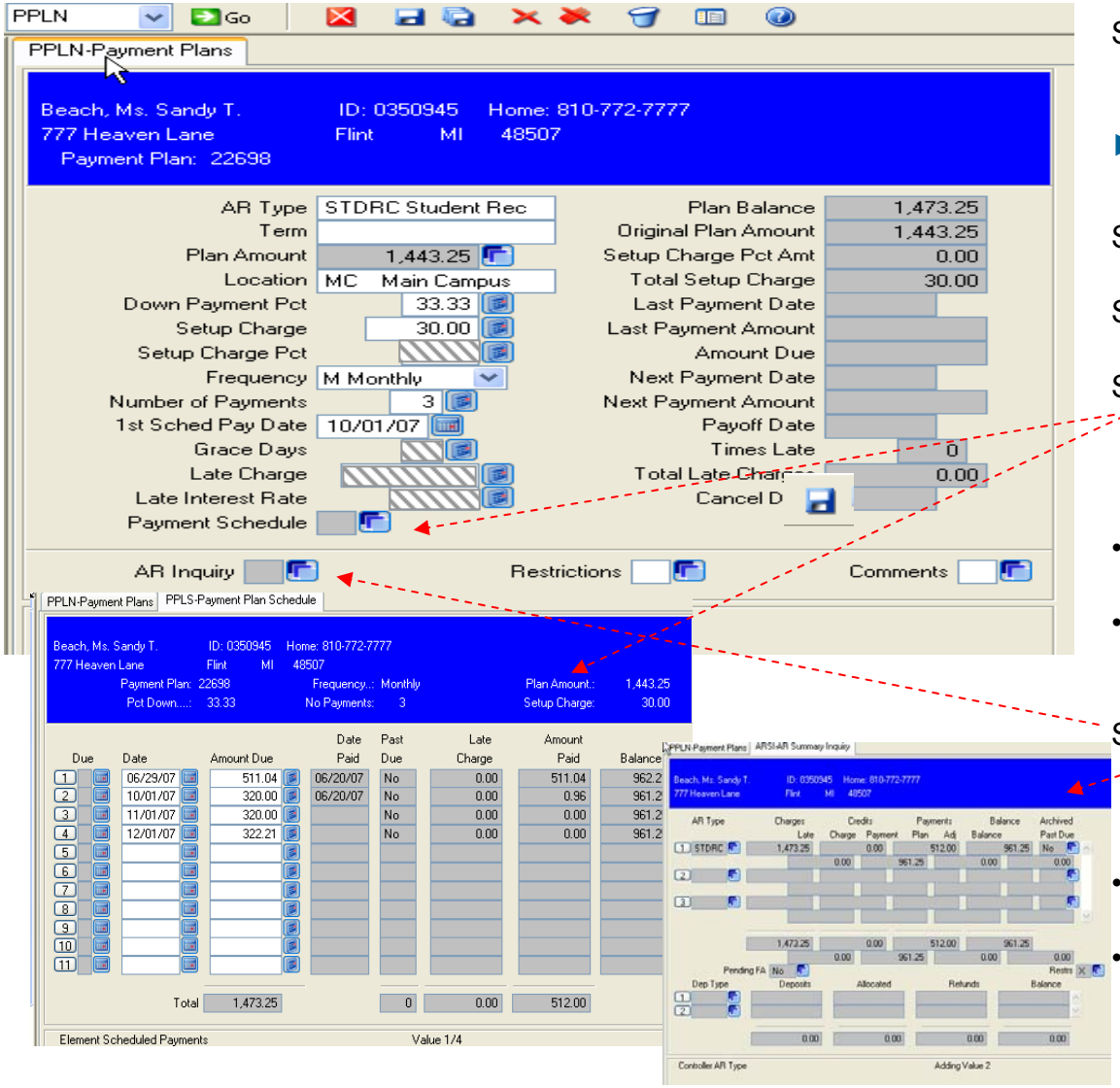
Step 8. Down Payment Percent *auto fills*

Step 9. Set-Up charge *auto fills*

Step 10. Frequency *auto fills*

Step 11. Number of Payments *auto fills*

► **Once a payment has been made, number of payments can not be changed**



Step 12. <u>1st sched pay date</u> **Type in the 15th of the month the TERM starts.** [e.g. 01/15/08 for 2008/3]

► College policy is 1st payment is due when payment plan is established

Step 13. <u>Grace Days</u> - Not Used

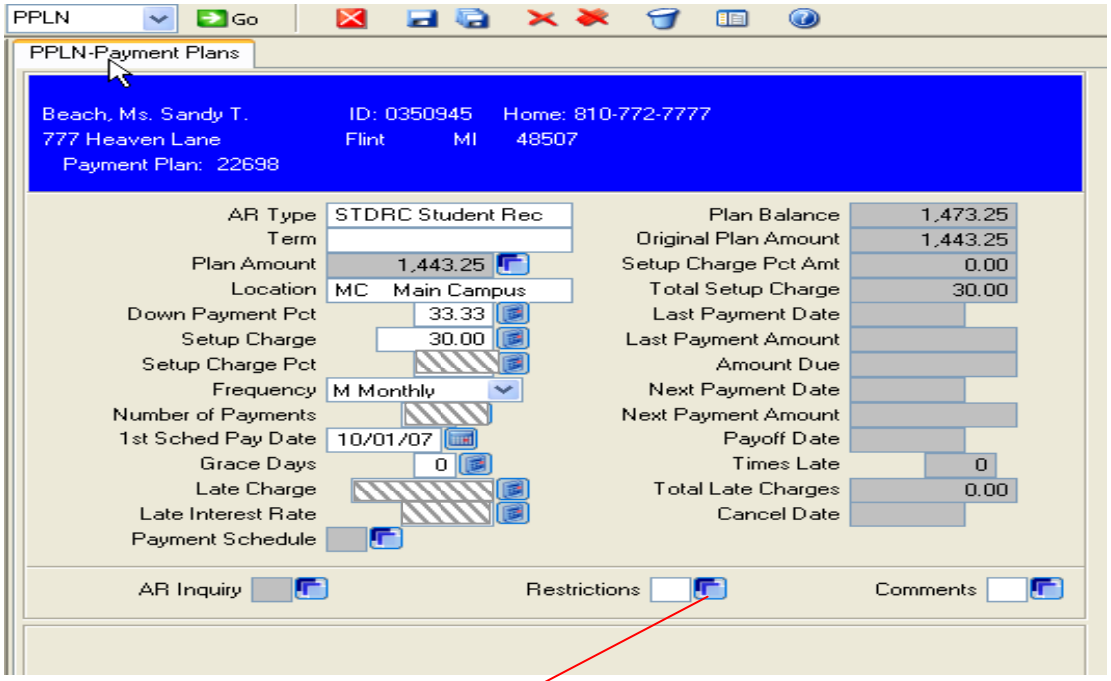
Step 14. <u>Late Charge</u> – Not Used

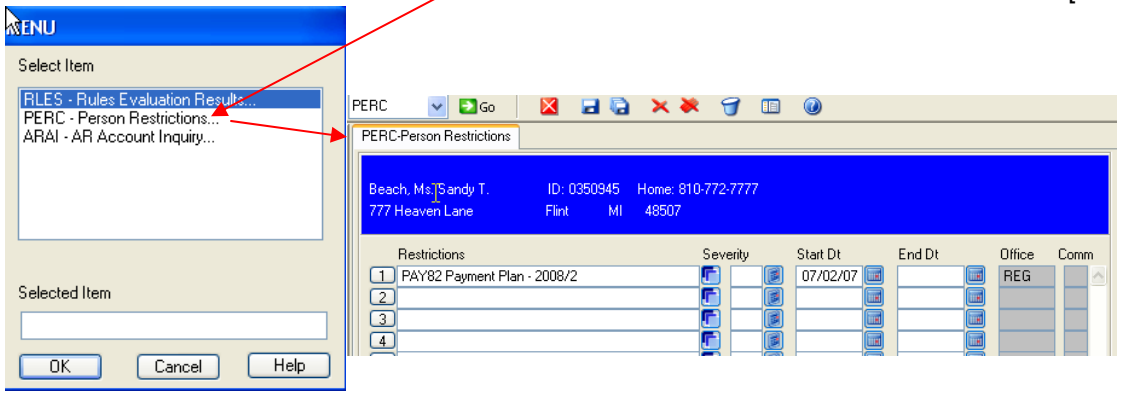
Step 15. <u>Payment Schedule</u>: (optional)
Click drop down button to view schedule of dates and amounts of payment plan PPLS

- Finish
- Update

Step 16. <u>AR Inquiry</u> (optional) Jumps to the **ARSI** screen View amounts, balances, and payment dates

- Finish
- Update





Step 17. Restrictions **Click** drop down icon.

Choose PERC
Type *PAYxx* ***or Lookup [...]***

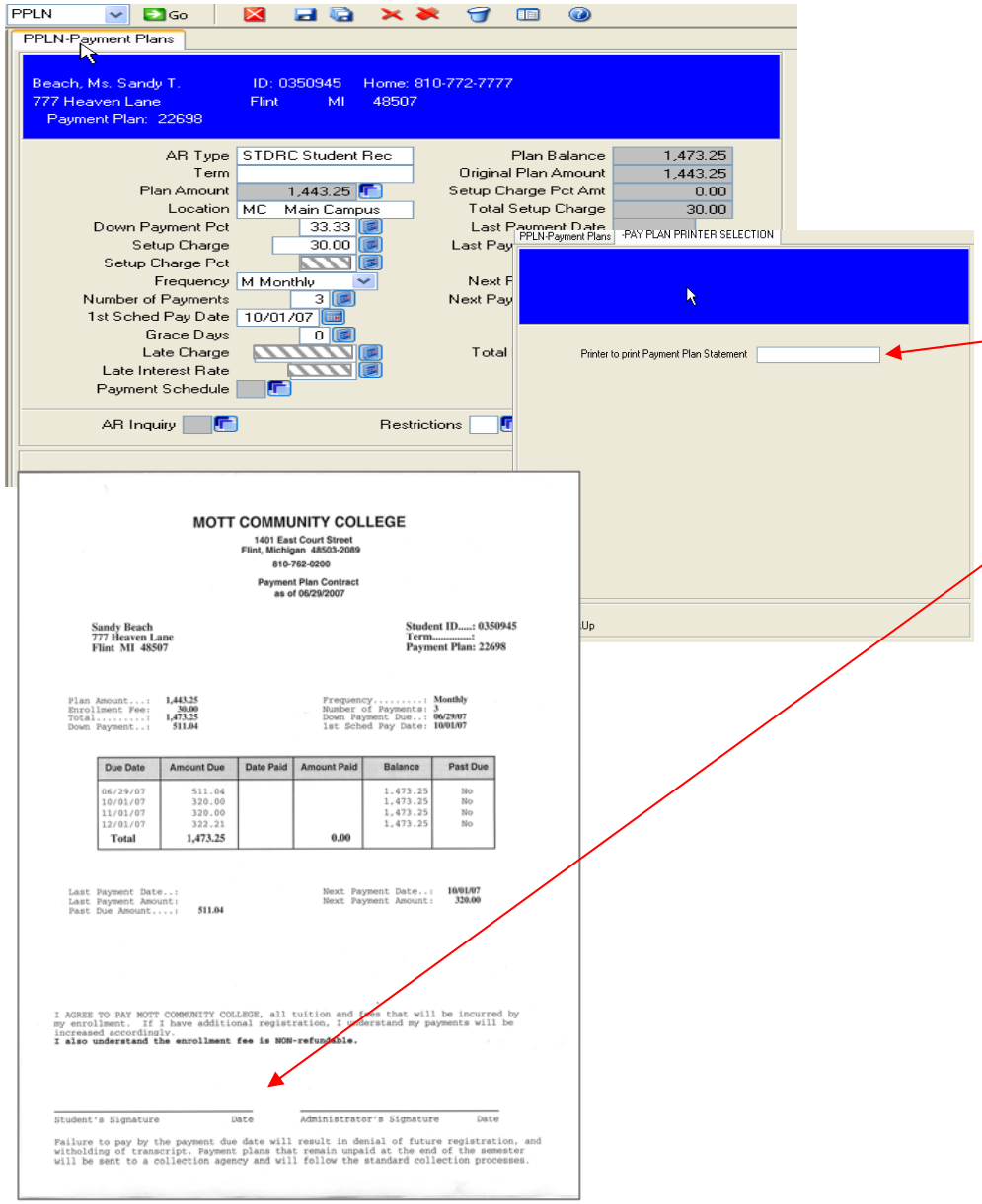
[xx is term of Payment Plan e.g. PAY82 = 2008/2]

Step 18. **Type** End date **of PP**

► **three months from entry date**

Step 19. *Comments* : *(optional)* Free form entry, not used in Datatel reports

Finish and Update
[back to PPLN screen]



Step 20.

- **Finish**
- Update
- **Type** Printer name to print Contract [e.g. cm1146hp4k01]
- **Finish**
- Have Student sign contract and forward to Student Accounts Coordinator

Scenario: Student needs to know when next scheduled payment is due.

PPLS-Payment Plan Schedule

Beach, Ms. Sandy T. ID: 0350945 Home: 810-772-7777
777 Heaven Lane Flint MI 48507
Payment Plan: 22698 Frequency..: Monthly Plan Amount.: 1,443.25
Pct Down....: 33.33 No Payments: 3 Setup Charge: 30.00

Due	Date	Amount Due	Date Paid	Past Due	Late Charge	Amount Paid	Balance
1	06/29/07	511.04	06/20/07	No	0.00	511.04	962.21
2	10/01/07	320.00	06/20/07	No	0.00	0.96	961.25
3	11/01/07	320.00		No	0.00	0.00	961.25
4	12/01/07	322.21		No	0.00	0.00	961.25
5							
6							
7							
8							
9							
10							
11							
	Total	1,473.25		0	0.00	512.00	

Element Scheduled Payments Value 1/4

View Students Payment Plan

PPLS = Payment Plan Schedule

- Dates of Payments
- Amount Due
- Amount Paid
- Balance

M O T T C O M M U N I T Y C O L L E G E

Receipt: 000391494

Received From: Sandy Beach
Cashier Code: NC

Date of Receipt
06/20/07

Payment For 0350945 Sandy Beach

BEG BAL	PAYMENT	END BAL
1,473.25	512.00	961.25

Check 3841 512.00

Total: 512.00

Payment receipt