

# iPlan Set-Up Instructions

**\*for complete information: LUC.edu/iPlan**

## LOCUS Navigation

Login to LOCUS at [LUC.edu/LOCUS](http://LUC.edu/LOCUS) using your Loyola universal ID and password. Select **Financial Account** tile, then click **Installment Plan-iPlan** from the left-hand side of the web page. Then **View/Create iPlan**, read the **welcome message** and then click **"Next"** at the bottom of the screen.

Academic Choices		Messages	
Career:	Undergraduate	Academic Program:	UCAS
*Attending Full Time?	Yes		
Class Code:	Junior	H.S. Graduation Date:	05/01/2014
*Installment Plan:	Annual (Fall & Spring)		
*Attending in Non-US Location?	No	Which Term?	
International Program:			
<input type="button" value="Previous"/> <input type="button" value="Save"/> <input type="button" value="Next"/>		<p>If your academic choices are not listed, please contact an iPlan Administrator at <a href="mailto:iplan@luc.edu">iplan@luc.edu</a> for assistance.</p> <p>Graduate Students: The "Attending Full Time" drop down automatically defaults to Yes. Please click on the Next button and enter the number of credit hours or number of courses you anticipate to register for by term.</p>	

## Plan Type

Select whether you are a full- or part-time student and choose to enroll in an annual (Fall & Spring) or term (Fall or Spring) iPlan. **NOTE:** Plan availability depends on enrollment date.

## Charges/ Credits

The iPlan Budget Wizard will then take you through **steps 1-6**, during which it will pull in your tuition, mandatory fees, on-campus housing and meal plan charges, in addition to your expected loans and scholarships from your financial aid award for the **Fall semester** (annual / Fall term plan set-up) or **Spring semester** (Spring term plan set-up).

As you proceed through the steps, you can see the changes in the **"budget summary"** totals at the bottom of the screen.

If any of the information appears incorrect or you have additional loans or scholarships, you will be able to account for these items in a later step.

Tuition	
Estimated Tuition Charges:	19,865.00
Actual Tuition Charges:	0.00

  

Budget Summary	
Current Charges:	41,062.00
Prior Charges:	0.00
Total Credits:	26,152.00
<b>Total:</b>	<b>14,910.00</b>

**1**

Fees	
Estimated Mandatory Fees:	666.00
Actual Mandatory Fees:	0.00

Fee Selection	Description	Amount
<input checked="" type="checkbox"/>	CTA U-Pass	135.00
<input checked="" type="checkbox"/>	Technology Fee	120.00
<input checked="" type="checkbox"/>	Student Development Fee	411.00

  

Budget Summary	
Current Charges:	41,062.00
Prior Charges:	0.00
Total Credits:	26,152.00
<b>Total:</b>	<b>14,910.00</b>

**2**

Room	
Estimated Room Charges:	0.00
Actual Room Charges:	0.00

Room Selection	Description	Amount
<input type="checkbox"/>	Fairfield Hall Double	4,375.00
<input type="checkbox"/>	Fairfield Hall Double(1 Bdrm)	4,565.00
<input type="checkbox"/>	Fairfield Hall Quad	4,235.00
<input type="checkbox"/>	Fordham Hall Std Dbl	4,375.00
<input type="checkbox"/>	Fordham Hall One Bdrm Double	4,765.00
<input type="checkbox"/>	Fordham Hall Quad	4,555.00
<input type="checkbox"/>	Santa Clara Hall Double	4,315.00
<input type="checkbox"/>	Santa Clara Hall Quad	4,315.00
<input type="checkbox"/>	Seattle Hall Single	0.00

**3**

Meals	
Estimated Meal Charges:	0.00
Actual Meal Charges:	0.00

Meal Plan Selection	Description	Amount
<input type="checkbox"/>	5 Day All Access Meal Plan #1	2,455.00
<input type="checkbox"/>	5 Day All Access Meal Plan #2	2,555.00
<input type="checkbox"/>	7 Day All Access Meal Plan #1	2,490.00
<input type="checkbox"/>	7 Day All Access Meal Plan #2	2,590.00
<input type="checkbox"/>	Declining Balance Meal Plan	1,000.00
<input type="checkbox"/>	Declining Balance Meal Plan	1,000.00

**4**

Fall Loans	
Fall Loans:	3,216.00

Fall Loans	Description	Amount
<input checked="" type="checkbox"/>	Direct Subsidized Staffrd Loan	2,226.00
<input checked="" type="checkbox"/>	Direct Unsubsidized Staffrd Loan	990.00

  

Budget Summary	
Current Charges:	41,062.00
Prior Charges:	0.00
Total Credits:	26,152.00
<b>Total:</b>	<b>14,910.00</b>

**5**

Fall Scholarships	
Fall Scholarships:	9,660.00

Scholarships	Description	Amount
<input checked="" type="checkbox"/>	State of IL MAP Grant (Est)-FI	2,360.00
<input checked="" type="checkbox"/>	Trustee Scholarship	7,500.00

  

Budget Summary	
Current Charges:	41,062.00
Prior Charges:	0.00
Total Credits:	26,152.00
<b>Total:</b>	<b>14,910.00</b>

**6**

**\*For annual plans, steps 7-12 of the iPlan Budget Wizard concern the Spring semester and are a repeat of steps 1-6. During these steps, your estimated charges and credits will be taken into account.**

## Other Credits

**Step 7** (term plan set-up) or **step 13** (annual plan set-up) is available if you would like to include any “other credits” in your iPlan that were not included in previous steps of the Budget Wizard.

### FAMILY CONTRIBUTIONS\*

may include lump-sum payments such as student savings or contributions from a 529 plan.

### FINANCIAL AID LOANS\*

ONLY include loans that you’ve applied for, but that are not yet added to your official financial aid award.

### FINANCIAL AID SCHOLARSHIPS\*

ONLY include confirmed outside scholarships not yet added to your official financial aid award.

Credits		
Other Credits:		0.00

  

Family Contribution		
Description	Amount	Term
1		

  

Financial Aid Loans		
Description	Amount	Term
1		

  

Financial Aid Scholarships		
Description	Amount	Term
1		

  

Budget Summary	
Current Charges:	41,062.00
Prior Charges:	0.00
Total Credits:	26,152.00
<b>Total:</b>	<b>14,910.00</b>

Previous Save Next

\*All other credits are due by Aug. 5 for the Fall term and Jan. 5 for the Spring term; if not paid, your plan will be automatically increased by these amounts.

Fall	Spring
Tuition: 19,865.00	Tuition: 19,865.00
Fees: 666.00	Fees: 666.00
Room: 0.00	Room: 0.00
Meal: 0.00	Meal: 0.00
<b>Term Charges: \$20,531.00</b>	<b>Term Charges: \$20,531.00</b>
Loans: 3,216.00	Loans: 3,216.00
Scholarships: 9,860.00	Scholarships: 9,860.00
<b>Term Credits: \$13,076.00</b>	<b>Term Credits: \$13,076.00</b>

  

Charges: 41,062.00	Installation Plan Type: 12 Month Plan
Prior Plan Rollover: 0.00	Number of Installments: 12
Additional Charges: 3949.95	Number of Installments Paid: 0
Payment Plan Fee: 95.00	Outstanding Installments: 12
<b>Total Charges: \$45,106.95</b>	Installation Amount: \$1,571.66
Credits: 26,152.00	
Other Credits:	
Additional Credits: 0.00	
<b>Total Credits: \$26,152.00</b>	
<b>Total Budget: \$18,954.95</b>	
Prior Installments: 0.00	
<b>Remaining Budget: \$18,954.95</b>	

Previous Save Next

## Finalize Plan

In **step 8** (term plan set-up) or **step 14** (annual plan set-up), you will see a summary of the iPlan you have created. The charges are shown separated by item type (top) and then combined into a “Total Budget” (bottom). It is during this step that you select how many installments you would like to break up your total budget into from the options available (dependent on enrollment date).

After clicking “next” on this step, you will be given the option to “finalize version” of the plan you have created, or “edit” the plan. If you select “edit,” you will again be taken through the set-up process.

## Enter Payer Details & Agree to Terms

After clicking “finalize version,” you must complete the payer details form and agree to the terms and conditions of the iPlan to ensure your plan is activated.