iPlan Set-Up Instructions

LOCUS Navigation
Students: Login thru LOCUS, select Financial Account tile> Installment Plan-iPlan
Parent Guest: Login thru LOCUS, select General Access tile> Installment Plan-iPlan

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.

*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 Prepaid 529 Tuition 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.

### 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 type and term (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 wizard.

### 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.