

Student and Authorized Parties: How to set up multiple Payment Plans

Allegheny College will allow multiple payment plan agreements per student per term. Nelnet refers to this as **Parallel Agreements**. Parallel agreements are commonly used for students who have multiple parties paying their tuition, such as parents maintaining separate households, sponsors and other family members who wish to financially contribute to the student's education.

Signing in

Students will log in through their Self Service account. Authorized Parties will log in through the link provided in their confirmation email or click [here](#).

Home page

The Student or Authorized Party navigates to their Home Page and clicks the **Set Up a Payment Plan** button to enroll in a payment plan agreement. In the below example, the Student (Clara) will enroll in a payment plan.

The screenshot shows a user interface for Clara Hunter. At the top, there is a navigation bar with 'Home', 'My Profile', and 'Financial Accounts' on the left, and a notification bell, a lock icon, and 'Signed in as Clara' on the right. Below the navigation bar, the user is greeted with 'Hello Clara'. The main content area is divided into two panels. The left panel, titled 'Payment Plan & Billing' with a dollar sign icon, shows 'Clara Hunter ID: 1321', a 'Current Balance' of '\$5,000.00' with a link to 'Transaction Details', and a 'Make a Payment' button. Below this, it shows 'SPRING 2021 Current Charges' and 'AMOUNT DUE \$5,000.00', with a green 'Set up a Payment Plan' button highlighted by a red arrow. The right panel, titled 'Clara Hunter' with a person icon, lists 'TestAccount1@FactsMgt.com', an option to 'Register to receive text services on your mobile phone.', and a note that there are 'Two Authorized Parties on your account' with a link to 'Add an Authorized Party.'

The Student (Clara) clicks **Set up a Payment Plan**, enters any required information on the Welcome and Contact information screens, and then continues to navigate to the **Amount Due** screen.

Amount Due

The **Amount Due** field will automatically populate, but must be edited by the first Student or Authorized Party to set up a payment plan in order for there to be a balance for a second payment plan to be set up in the same term. In the below example, the Student (Clara) edits the \$5,000 balance to \$2,000 for their payment plan enrollment. That will leave a \$3,000 remaining balance for another Authorized Party to set up a payment plan for the term.



Amount Due

This is the current amount posted to your student account for this term that is eligible for a payment plan.

Details - Clara Hunter

Expand All | Collapse All

	Description	Amount	Total
+	Student Account Balance		2,000.00
Total			2,000.00

Back Next Cancel

The Student (Clara) proceeds to complete the rest of the fields in their payment plan enrollment. See How to Set up a Payment Plan for more details.

Home page with a payment plan in place

Once the Student or Authorized Party finalizes their payment plan enrollment, they are redirected to their Home page. The Student's (Clara's) Payment Plan Agreement Number and their plan balance are displayed in the **Activity** section of the page (this plan required a down payment of \$1,200 during enrollment, so the payment plan balance is \$800).

Hello Clara

\$

Payment Plan & Billing

Clara Hunter ID: 1321

Current Balance

\$3,800.00

[Transaction Details](#)

Make a Payment

[View Details](#)

SPRING 2021

Balance Difference of \$3,000.00 - An adjustment to the payment plan(s) is needed to match the Student account for this term.

ACTIVITY	AMOUNT DUE
Payment Plan (101 042 158) Actions	\$800.00
Plan owned by Clara Hunter	

👤

Clara Hunter

✉️

TestAccount1@FactsMgt.com

📱

Register to receive text services on your mobile phone.

🏦

Wells Fargo - 1383

👥

Two Authorized Parties on your account

[Add an Authorized Party.](#)

- The **Balance Difference** (\$3,000) is displayed, indicating there is a remaining balance for the term that is not included in the payment plan.
- This student has two Authorized Parties on their account. One or both Authorized Parties can log in and set up a payment plan for the term.

How to Set up an Additional Payment Plan – Parallel Agreement

An Authorized Party (Theo) now logs in and lands on his Home page.

The remaining balance of \$3,000 that can be set up for a payment plan is displayed. If payment plan enrollment is no longer open the **Set Up a Payment Plan** link is not shown. The Student or Authorized Party would only be able to click the **Make a Payment** button to make a payment towards the balance.

The Authorized Party (Theo) can also see there is a payment plan in place that is owned by Clara Hunter.

The screenshot shows a user interface for Theo Hunter. At the top, there is a navigation bar with 'Home', 'My Profile', and 'Financial Accounts'. The user is signed in as Theo. Below the navigation bar, the user is greeted with 'Hello Theo'. The main content area is divided into two sections. The left section is titled 'Payment Plan & Billing' and shows a current balance of \$3,800.00. A green button labeled 'Make a Payment' is visible. Below this, a yellow box contains a message: 'A balance of \$3,000.00 is still owed for this term and has not yet been added to a payment plan.' A red arrow points to a 'Set up a Payment Plan' link within this box. Below the yellow box is a table with two columns: 'ACTIVITY' and 'AMOUNT DUE'. The table lists 'Payment Plan (101 042 158)' with an amount due of '\$800.00'. A red arrow points to the text 'Plan owned by Clara Hunter' below the table. The right section is titled 'Theo Hunter' and shows contact information: 'TestAccount1@factsmgt.com' and a link to 'Register to receive text services on your mobile phone.' At the bottom of this section is a link: 'Have another activity you want to link?'.

The Authorized Party (Theo) clicks the **Set Up a Payment Plan** link to set up an additional agreement for the same term.

Amount Due

After confirming the Welcome and Contact information, the Authorized Party (Theo) will land on the **Amount Due** screen.

In the below example, the remaining balance of \$3,000 is automatically populated. The Authorized Party (Theo) can set up a payment plan for the full remaining balance, or has the ability to edit the \$3,000 to a smaller amount, leaving a remaining balance for another Authorized Party to set up a payment plan agreement.



Amount Due

This is the current amount posted to your student account for this term that is eligible for a payment plan.

Details - Clara Hunter

Expand All | Collapse All

	Description	Amount	Total
+	Student Account Balance		3,000.00
Total			3,000.00



[Back](#) [Next](#) | [Cancel](#)

The Authorized Party (Theo) continues with the enrollment, completes all screens as prompted, and finalizes his payment plan enrollment.

Authorized Party Home page

Upon finalization of the additional payment plan enrollment, the Authorized Party (Theo) is directed back to their Home page.

The Authorized Party (Theo) now sees two active payment plan agreements for the term. The entire balance for the term is now set up to be paid by the two payment plan agreements so there is no longer a Balance Discrepancy.

Home My Profile Financial Accounts

 Signed in as Theo

Hello Theo

\$

Payment Plan & Billing

Clara Hunter ID: 1321

Current Balance
\$2,000.00 [Transaction Details](#)

[Make a Payment](#)

[View Details](#)

SPRING 2021	AMOUNT DUE
Payment Plan (101 042 161) Actions	\$1,200.00
<small>Plan owned by Theo Hunter</small>	
Payment Plan (101 042 158)	\$800.00
<small>Plan owned by Clara Hunter</small>	

Balance may not include Nelnet fees that are owed by another party.

Theo Hunter

TestAccount1@factsmgt.com

Register to receive text services on your mobile phone.

Wells Fargo - 3582

Have another activity you want to link?

Actions menu

As an **Authorized Party** with limited access rights, Theo can only view and select the **Actions** menu for changes to his own agreement.

In contrast, the **Student (Clara)** has access rights to view and select **Actions** options for all agreements on their Student Account.

The screenshot shows the user interface for Theo Hunter. The top navigation bar includes 'Home', 'My Profile', and 'Financial Accounts', along with a notification bell, a lock icon, and the text 'Signed in as Theo'. The main heading is 'Hello Theo'. On the left, the 'Payment Plan & Billing' section shows a current balance of \$2,000.00 and a 'Make a Payment' button. Below this, a table lists payment plans for Spring 2021. The first plan, owned by Theo Hunter, has an amount due of \$1,200.00. An 'Actions' dropdown menu is open for this plan, with a red arrow pointing to it. The menu options are: 'Cancel Payment Plan', 'Change Financial Account', 'Request a New Plan Owner', and 'View Details'. On the right, the user profile for Theo Hunter is shown, including his email address 'TestAccount1@factsmgt.com', a link to register for text services, and his bank account 'Wells Fargo - 3582'.

SPRING 2021		AMOUNT DUE
Payment Plan (101 042 161)	Actions	\$1,200.00
Plan owned by Theo Hunter	Cancel Payment Plan	
Payment Plan (101 042 158)	Change Financial Account	0.00
Plan owned by Clara Hunter	Request a New Plan Owner	
	View Details	

Additional Authorized Parties

If another Authorized Party (Mary) logs in, the **Set Up a Payment Plan** link is not displayed because there is no remaining payment plan eligible balance. Mary could click the **Make a Payment** button to make a payment toward the balance even though there are payment plans in place to cover the balance.

The screenshot shows the user interface for Mary Hunter. The top navigation bar includes 'Home', 'My Profile', and 'Financial Accounts', along with a notification bell, a lock icon, and the text 'Signed in as Mary'. The main heading is 'Hello Mary'. On the left, the 'Payment Plan & Billing' section shows a current balance of \$2,000.00 and a 'Make a Payment' button, with a red arrow pointing to it. Below this, a table lists payment plans for Spring 2021. The first plan, owned by Theo Hunter, has an amount due of \$1,200.00. The second plan, owned by Clara Hunter, has an amount due of \$800.00. On the right, the user profile for Mary Hunter is shown, including her email address 'TestAccount1@factsmgt.com' and a link to register for text services.

SPRING 2021		AMOUNT DUE
Payment Plan (101 042 161)		\$1,200.00
Plan owned by Theo Hunter		
Payment Plan (101 042 158)		\$800.00
Plan owned by Clara Hunter		