

iPlan Set-Up Instructions

LOCUS Navigation

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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.

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 1 S F Q B J E 529 5 V J U J P O 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 B O E U F S N(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 X J [B S E.

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.