

Adjust Payment Plan Balance

Authorized Payers cannot adjust the payment plan agreement balance unless they are the Plan Owner. The Plan Owner is the person who logged into QuikPay and created / established the payment plan agreement.

Step1: Adjust a payment plan agreement, the Plan Owner will click from the left-hand menu **Payment Plan > Agreement Id** under Active Payment Plans. From the Payment Plan Details page, the user will click **Adjust Balance** under Payment Plan Installments.

Message Board

Payment Profiles

Authorize Payers

User Preferences

View & Pay Accounts

Transaction History

Payment Plan

Messages

TSC1098-T

Payment Plan Details

[Back](#)

Central Spring

Terms and Conditions

Owner: Peter Payer

Agreement Id#: 100340

Authorized Access: None Granted

Status: ACTIVE

Created on: May 11, 2020 at 5:00 PM, CDT

Account: Central Tuition

Down Payment: 1400.00

Next Payment Date: 05/25/2020

Primary User Id: 1234758963211

Primary User Name: Peter Payer

Payment Method: Chase Mastercard (MASTERCARD ending with 5454) [Change Payment Method](#)

Billing Address Information: 1211 S. 30th
Lincoln, NE 68506

Contact Information: (402)222-2222(Daytime Phone)
(402)222-2222(Evening Phone)
peter.payer@university.edu(eMail)

Payment Plan Installments

[View Budget Worksheet](#)

Central Spring

Original Estimated Balance:	\$7,000.00	Adjust Balance
Payment(s) Processed:	-\$1,400.00	
Balance Adjustments:	\$0.00	
Remaining Payment Plan Balance:	\$5,600.00	
Actual Student Account Balance:	\$90.00	
Balance Adjustment Required:	-\$5,610.00	

⚠ Your current payment schedule does not match your original estimated balance. You may want to consider adjusting the current balance.

Actions	Date	Payment Amount	Status	Confirmation #
	May 25, 2020 (Mon)	\$1,120.00	🕒 SCHEDULED	1000054760
	Jun 25, 2020 (Thu)	\$1,120.00	🕒 SCHEDULED	1000054761

Step 2: A screen appears where the user can increase their payment plan balance. An amount is required when increasing the balance.

The screenshot shows a web interface with a sidebar on the left containing navigation links: Message Board, Payment Profiles, Authorize Payers, User Preferences, View & Pay Accounts, Transaction History, **Payment Plan** (highlighted), Messages, and TSC1098-T. The main content area is titled 'Adjust Balance' and features a 'Back' button in the top right. The form contains three radio button options: 'Zero out the remaining balance.', 'Increase your Estimated Balance by the amount you enter below.', and 'Decrease your Estimated Balance by the amount you enter below.'. Below these options is a text input field labeled 'Amount:' and two buttons: 'Continue' and 'Cancel'.

Step 3: The user clicks **Continue** to complete the adjustment and is taken back to the Payment Plan Details page upon completion. A successful message appears.

The screenshot displays the 'Payment Plan Details' page. At the top, there is a green success message: 'The payment plan has been updated successfully!' with a checkmark icon. A 'Back' button is located in the top right corner. Below the message, the page is titled 'Central Spring' with a sub-section for 'Terms and Conditions'. The details are as follows:

Owner:	Peter Payer
Agreement Id#:	100380
Authorized Access:	None Granted
Status:	ACTIVE
Created on:	May 15, 2020 at 3:43 PM, CDT
Account:	Central Tuition
Down Payment:	1400.00