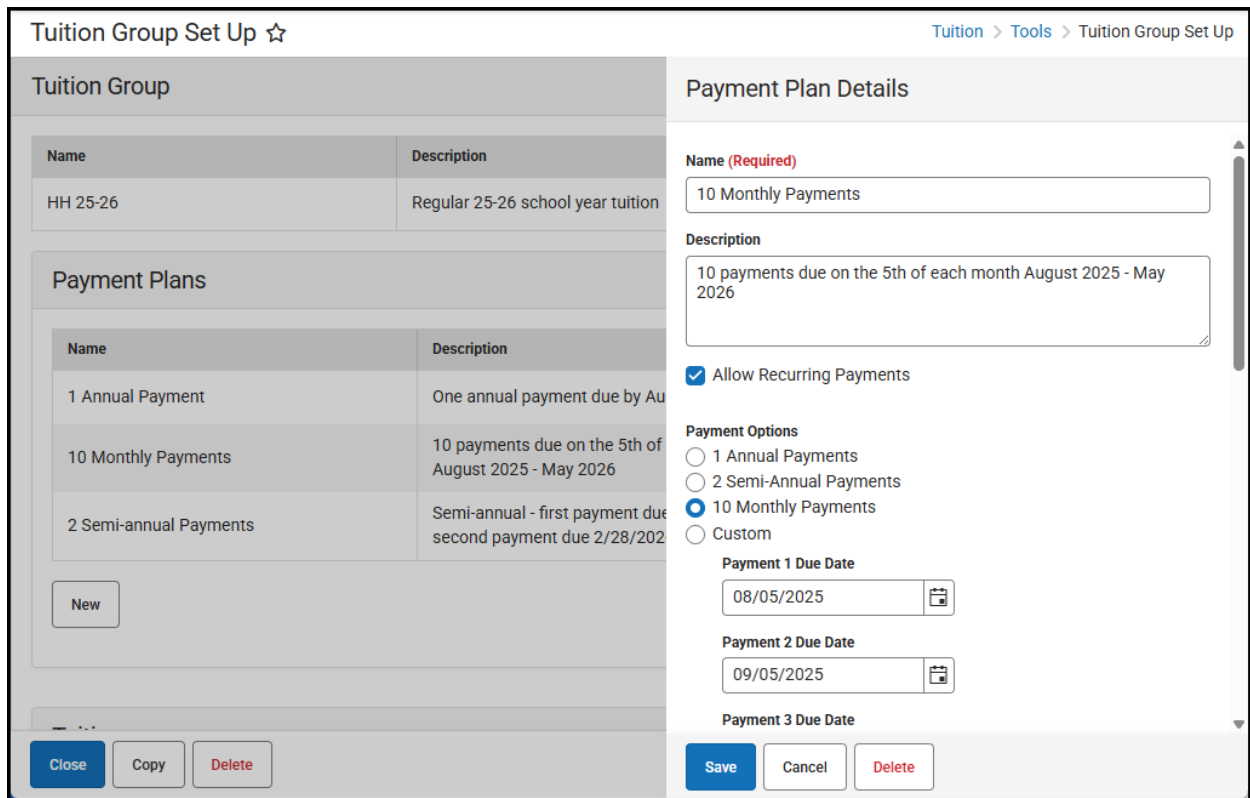


Create a Payment Plan

Last Modified on 11/19/2025 1:13 pm CST

This guide explains how to create Payment Plans that are assigned to guardians to schedule their students' tuition payments.



The screenshot shows the 'Tuition Group Set Up' interface. On the left, under 'Tuition Group', there is a table with one entry: 'HH 25-26' with description 'Regular 25-26 school year tuition'. Below this is the 'Payment Plans' section with a table listing three plans: '1 Annual Payment', '10 Monthly Payments', and '2 Semi-annual Payments'. A 'New' button is at the bottom of this section. On the right, the 'Payment Plan Details' section is active. It contains a 'Name (Required)' field with '10 Monthly Payments', a 'Description' field with '10 payments due on the 5th of each month August 2025 - May 2026', and a checked 'Allow Recurring Payments' checkbox. Under 'Payment Options', '10 Monthly Payments' is selected. Below are fields for 'Payment 1 Due Date' (08/05/2025), 'Payment 2 Due Date' (09/05/2025), and 'Payment 3 Due Date'. At the bottom are 'Save', 'Cancel', and 'Delete' buttons.

Payment Plans would be created after initially creating a Tuition Group.

Before you start

- [Enable Tuition](#)
- [Create a tuition group](#)

Create a Payment Plan

1. Click **New** under Payment Plans.
2. Enter a Name.
3. (Optional) Enter a Description.
4. Mark or unmark the Allow Recurring Payments checkbox.
5. Select Payment Options and enter a Payment 1 Due Date.

The system automatically populates due dates for periods following the Payment 1 Due Date once it is entered. However, these dates can be manually edited. Please note that custom payment plans do not auto-populate any due dates.

6. Select if there will be a Fee or a Discount

- If Payment Plan Discount: select and enter either a Discount \$ Amount or Discount % of Tuition
- If Payment Plan Fee: select and enter either a Fee \$ Amount or Fee % of Tuition.

7. Click **Save**.
