

Create a Payment Plan

Last Modified on 03/09/2022 4:17 pm EST

Path: Main Menu > Admissions Menu > Payment Center

About

Payment Plans can be created in the Payment Center of NSS when clients are making a payment using a credit or debit card or when they are making a payment using a credit card on file.

Create a Payment Plan

1. Navigate to the Payment Center by following the path above.
2. Search for and select the client.
3. See **Enter a Client Payment** to complete the fields when using **Payment Method** CREDIT/DEBIT or using a card saved on file.
4. In the Action section, select the **Payment Plan** radio button.
5. Click the **Setup Payment Plan** button. The Payment Recurrence screen is displayed.
6. Complete the following fields:
 - **Start Collection On:** Enter a date to start collecting recurring payments.
 - **Charge:** Enter the amount to charge on each recurring date.
 - **Collect Every:** Sets the recurring charge pattern.
 - **Weekly:** Specific day of each week.
 - **Month (Relative):** Relative date each month (e.g. the 3rd Thursday of the month).
 - **Month (Specific):** Specific calendar day of the month.
 - **On:** Select the interval of the recurring charge pattern. The wording for the field depends on your Collect Every selection.
 - **Total Charges:** Total amount to charge client.
 - **Use Card:** Only a credit or debit card can be used. If the card is not on file, click **Swipe Card** to use a card swiper or click **Key Card** to manually enter the card information.
 - **Collect Today:** Amount to collect once the plan is created, this will apply to the Total Charge balance.
 - **Location, Category, and Agency:** These options display if enabled for your Agency. Choose a selection to apply the payment to.
 - **Name On Card:** Enter the name on the card.
7. *(Optional)* Click the **Preview Schedule** button to preview the recurring payment schedule. If changes are needed, close the preview window and edit the Payment Recurrence fields. If changes are not needed, close the preview window and proceed to the next step.

Date	Amount Charged	Running Total
1/31/2021	\$100.00	\$100.00
2/28/2021	\$100.00	\$200.00
3/31/2021	\$100.00	\$300.00
4/30/2021	\$100.00	\$400.00
5/31/2021	\$100.00	\$500.00
6/30/2021	\$100.00	\$600.00
7/31/2021	\$100.00	\$700.00
8/31/2021	\$100.00	\$800.00
9/30/2021	\$50.00	\$850.00

8. Click the **Submit** button to submit the Payment Plan. If Collect Today has a value other than \$0, the Payment Method is charged that amount.
9. The payment schedule is listed in the **Active Payment Plans** grid within the Payment Center and displays the following information:
 - **Total Charge:** The total amount to be collected at the end of the Payment Plan.
 - **Remaining:** The amount left to collect on the Payment Plan.
 - **Next Charge Amount:** What the client will be charged at the next scheduled payment.
 - **Next Charge Date:** The next date the client will be charged.
 - **Last Charge Date:** The date the client was last charged.
10. Click the **plus sign** next to the Payment Plan to expand and view details such as the card used, occurrence, and interval.

Notes:



- If you need to cancel the payment plan, click the **Stop Plan** button. You must have this permission enabled for your user login.
- The payment plan cannot be edited once submitted. You must stop the plan and create a new one with the changes.