How to rebalance a payment plan

• Only the payment plan owner can rebalance the payment plan. If you are not the payment plan owner, you cannot rebalance the payment plan.

• If the student enrolled in the payment plan, the student is the owner of the plan.

• If an Authorized Payer enrolled in the payment plan, the Authorized Payer is the owner of the plan.
Step 1: Students log in to MyCUInfo. Authorized payers log in to CUBill&Pay, select Payment Plan and proceed to step 3.
Step 2: Some students may need to select the **Student** tab. Then select **Billing Information** and click **View Payment Plans**.
Step 3: Click View Details.

Payment Plans
Nelnet Campus Commerce may be able to provide you with the opportunity to budget your payments over time.

Advantages
- Low, one-time enrollment fee for each Payment Plan
- Budget payments into smaller, monthly installments
- Automatically deduct your payment from the account you designate during the enrollment process.

Available Payment Plans
To enroll in a new payment plan, select a Payment Plan from the options below and click the "Sign Up for New Payment Plan" button.

Active Payment Plans
To view the detail of an active plan and to change the payment method for your plan, click the "View Details" link for that particular plan.

Blocked Payment Plans
CE Boulder Fall 2017
The CE Payment Plan is unavailable to you at this time.

Active Payment Plans

Agreement Id#: 010000 (View Details)

ACTION REQUIRED: (click on View Details)
An adjustment to your payment plan balance is required.

Enrolled Plan: CU Boulder Main Campus Fall 2017
Account: PAYMENT_PLAN_CUBLD
Create Date: 08/02/2017

<table>
<thead>
<tr>
<th>Plan</th>
<th>Remaining Balance</th>
<th>Installs</th>
<th>Next Payment Date</th>
<th>Next Payment Amount</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>CU Boulder Main Campus Fall 2017</td>
<td>$8,100.00</td>
<td>4</td>
<td>09/05/2017</td>
<td>$2,080.69</td>
<td>ACTIVE</td>
</tr>
</tbody>
</table>

* The service fee is included in the payment amount.
Step 4: Click **Balance Management**.

**CU Boulder Main Campus Fall 2017  Terms and Conditions**

**Agreement Id#: 010000**

**Owner: Firstname Lastname**

**Authorized Access: None Granted**

**Status: ACTIVE**

**Created on: Aug 2, 2017 at 10:39 AM, MDT**

**Account: PAYMENT_PLAN_CUBLD**

**Next Payment Date: 09/05/2017**

**Primary User Id: 0000000001**

**Primary User Name: Firstname Lastname**

**Service Fee: 2.75%**

**Payment Method: credit card (VISA ending with 1111) Change Payment Method**

**Contact Information:**

- (303)555-5555 (Evening Phone)
- email@colorado.edu (eMail)

---

**Payment Plan Installments** View Budget Worksheet

**CU Boulder Main Campus Fall 2017**

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Original Estimated Balance:</td>
<td>$8,367.26</td>
</tr>
<tr>
<td>Payment(s) Processed:</td>
<td>-$0.00</td>
</tr>
<tr>
<td>Balance Adjustments:</td>
<td>-$265.26</td>
</tr>
<tr>
<td>Remaining Payment Plan Balance:</td>
<td>$8,100.00</td>
</tr>
<tr>
<td>Actual Student Account Balance:</td>
<td>$7,965.55</td>
</tr>
<tr>
<td>Balance Adjustment Required:</td>
<td>-$134.35</td>
</tr>
</tbody>
</table>

⚠️ Your payment plan needs to be rebalanced to agree with your Actual Student Account balance. Rebalancing will ensure that your account is paid in full by the end of your payment plan. Please use the Balance Management link to decrease your plan balance. This action will cause the amounts of the remaining installments to be adjusted.
Step 5: Select Rebalance Payments Evenly and click **Rebalance Payments**.

**Balance Management**

Warning: Making an adjustment to your payment plan balance will affect the amount of the service fee that is assessed. The service fee is calculated based on 2.75% of your payment amount.

- Rebalance Payments Evenly

The service fee only applies to credit/debit card transactions.
Step 6: Review new details of the payment plan. This process is complete.

![Example of payment plan details](image)

**CU Boulder Main Campus Fall 2017 Terms and Conditions**

- **Agreement Id**: 010000
- **Owner**: Firstname Lastname
- **Authorized Access**: None Granted
- **Status**: ACTIVE
- **Created on**: Aug 2, 2017 at 10:39 AM, MDT
- **Account**: PAYMENT_PLAN_CUBLD
- **Next Payment Date**: 09/05/2017
- **Primary User Id**: 000000001
- **Primary User Name**: Firstname Lastname
- **Service Fee**: 2.75%
- **Payment Method**: credit card (VISA ending with 1111) [Change Payment Method]
- **Contact Information**: (303)555-5555 (Evening Phone) email@colorado.edu (eMail)

**Payment Plan Installments** [View Budget Worksheet]

<table>
<thead>
<tr>
<th>Confirm Num</th>
<th>Status ☐</th>
<th>Date (MM/DD/YYYY)</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002000000</td>
<td>SCHEDULED</td>
<td>Sep 05, 2017 (Tue)</td>
<td>$2,046.17 *</td>
</tr>
<tr>
<td>2002000000</td>
<td>SCHEDULED</td>
<td>Oct 05, 2017 (Thu)</td>
<td>$2,046.17 *</td>
</tr>
<tr>
<td>2002000000</td>
<td>SCHEDULED</td>
<td>Nov 06, 2017 (Mon)</td>
<td>$2,046.17 *</td>
</tr>
<tr>
<td>2002000000</td>
<td>SCHEDULED</td>
<td>Dec 05, 2017 (Tue)</td>
<td>$2,046.18 *</td>
</tr>
</tbody>
</table>

* The service fee is included in the payment amount.