**iPlan Set-Up Instructions**

**STEP 1: LOCUS Navigation**

Login to LOCUS at [LUC.edu/LOCUS](http://LUC.edu/LOCUS) using your Loyola universal ID and password. Select Campus Finances along the left-hand side of the web page, then Installment Plan. Click Create New i-Plan, read the welcome message and then click “Next” at the bottom of the screen.

**STEP 2: Plan Type**

Select whether you are a full- or part-time student and that you would like to enroll in an annual (Fall & Spring) iPlan.

**NOTE:** Single term iPlans are also available.

**STEP 3: Fall Charges/ Credits**

The iPlan Budget Wizard will then take you through steps 1-6, during which it will pull in your tuition, mandatory fees, on-campus housing and meal plan charges, in addition to your expected loans and scholarships from your financial aid award for the fall semester.

As you proceed through the steps, you can see the changes in the “budget summary” totals at the bottom of the screen.

If any of the information appears incorrect or you have additional loans or scholarships, you will be able to account for these items in step 13 of the set-up process.
STEP 4: Spring Charges/Credits
Steps 7-12 of the iPlan Budget Wizard are a repeat of steps 1-6, except during these steps your estimated charges and credits for the spring semester will be taken into account.

STEP 5: Other Credits
Step 13 is available in case 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 529 plan.

FINANCIAL AID LOANS* may include loans that you’ve applied for, but that are not yet added to your official financial aid award.

FINANCIAL AID SCHOLARSHIPS* may include outside scholarships not yet added to your official financial aid award.

STEP 6: Finalize Plan
In step 14, you will see a summary of the iPlan you have created. The charges are shown separated by semester (top) and then combined (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 14-step set-up process.

STEP 7: 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.