Student Fees (Working With Students):

Fee Exemption Status:

To mark a student as exempt from being assessed School Enrollment and/or Course Enrollment fees, select the student, then choose the Other Information page. In the Fee Exemption Status field, select one of the following:

- Student Exempted from Course Fees
- Student Exempted from School Fees
- Student Exempted from All Fees ***

*** Note: Selecting "Student Exempted from All Fees" does NOT prevent the student from being assessed a Student fee!! You must EXCLUDE the exempted student from the Current Selection BEFORE assessing student fees!!

To mark a group of students as exempt, select a group of students, such as a grade level, then select the group function, "Select Students By Hand". Select the students to be exempted. Once the students have been selected, click on "Functions" and choose "Student Field Value" from the group functions list.

The "Field to Modify" is: Fee_Exemption_Status

In the box beneath this field, type one of the following values:

1	To exempt the students from School Enrollment fees
2	To exempt the students from Course Enrollment fees
3	To exempt the students from BOTH School and Course Enrollment Fees.

Note: A value of 0 (zero) in this field indicates not exempt from any fees.

To Assess School Enrollment Fees for a Group of Students (at beginning of school year, typically):

If any new students have been enrolled since the End of Year process was run, they would have automatically been assessed any School Enrollment Fees at the time of enrollment, provided the assessments had not been turned off at the District Office.

To exclude any students from getting duplicate fees assessments, you should run an export of all fees records for the current year. Then create a selection that excludes students already assessed.

*Make sure that any student who should not be assessed has been marked as exempt from School Fees or All Fees. See above information on exemptions.

Now select Fee Functions from the group functions list.

Select "Assess School Enrollment Fees" from the Fee Functions menu.

Important!   Choose "For the Selected _____ Students only"! Then click "Submit".

To verify that the school fees were assessed, click on a student name in the current selection, then choose the Fee Transactions page.

To Assess a NEW School Enrollment Fee for a Group of Students:

This procedure would be used if school enrollment fees have already been assessed to all students, but a new school enrollment fee was added to the school at the District Office, as an afterthought.

Select the students to be assessed (see page 1). Select Fee Functions from the group functions menu. Select "New School Enrollment Fee". Next, select which fee to be assessed. Choose a Transaction Date, click Submit.

To Assess Course Enrollment Fees:

Set your Term to the current school year (**full-year term**).

*Verify that any student who should not be assessed has been marked as exempt from Course Fees or All Fees. See above information on exemptions.

Select the group of students or click on "All" under "Browse Students".

Select Fee Functions from the group functions list.

Select Assess Course Enrollment Fees.

Choose the appropriate option:

> For All Currently Enrolled Students in _____" OR:
>
> For the selection _____ students only.   OR:
>
> For _____ only.

Click Submit.

To verify that the course fees were assessed, click on a student name in the current selection, then choose the Fee Transactions page.

To Add a Student Fee to an Individual Student:

Select the student from the Start Page.

Under "Administration", click on "Fee Transactions".

Choose a fee from the "Create New Fee" drop-down list.

Optionally, select a Department.

Enter a Transaction Date.

Optionally, enter a Description.

Enter the Amount of the fee.

Amount of Credit: Optional. If the student is providing full or partial payment at the time this fee is being assessed, enter the payment amount in this field. Note: If the payment amount is greater than this fee, the extra money will be applied to other unpaid fees, based on fee type priority.

Payment Method: Optional. If the student is providing full or partial payment at the time this fee is being assessed, choose the method of payment from the drop-down list.

Payment Reference: Optional. If the student is providing full or partial payment at the time this fee is being assessed, enter a payment reference number, such as Check Number 4383.

Click "Submit".

To Add a Student Fee to a Group of Students:

From the Start Page, select the group of students to be assessed the student fee. Example of search command:

*number_of_classes>0;Grade_level=3   (click Enter or use the magnifying glass icon)

Then, immediately enter this search command to further narrow the selection to non-exempted students:

&fee_exemption_status=0
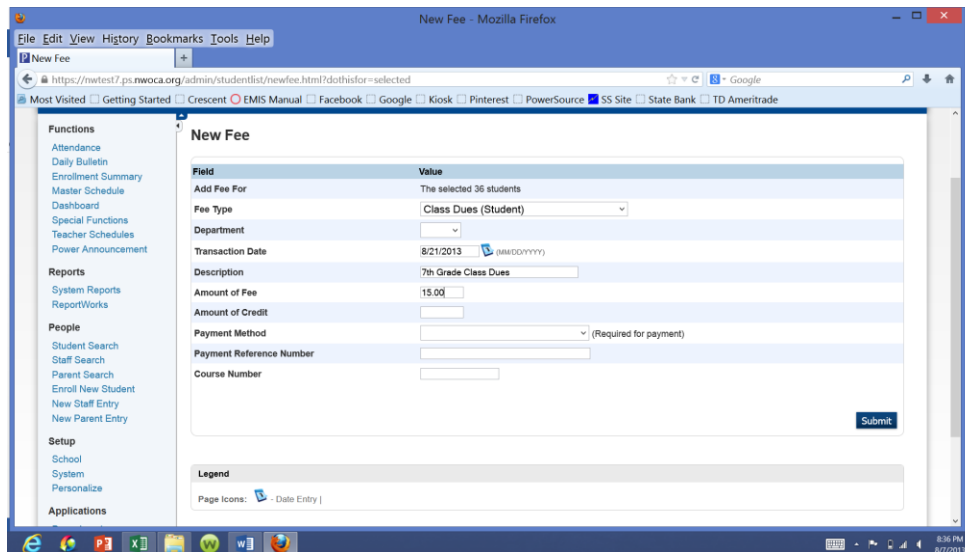

Choose "Fee Functions" from the group functions list.

Choose "New Fee" from the fee functions list. Select a fee from the fee type list.

Enter a Date.

Enter a Description.

Enter the Amount.

Click Submit.

To Receive a Fee Payment:

Select the student from the Start Page.

Select the Fee Transactions page.

Locate the fee for which you want to enter a payment.

Click "Payment" in the Transaction column on this row.

Enter the Transaction Date.

Select a Transaction Type from these options:

- Payment
- Void
- Credit

Description: Enter an explanation for this transaction, optionally.

Amount: Enter the amount of the payment. NOTE: If the Transaction Type is "Void", there is no need to enter a value in the "Amount" field. The fee balance will set the amount. NOTE: no matter what amount is entered, the use of the "Void" Transaction Type causes the entire amount of the fee to be voided.

NOTE: If the payment is greater than the balance, the payment will be rejected.

How to Distribute a Payment: (Lump Sum)

Use this procedure to enter a lump sum payment for a student and have it allocated across all outstanding fees, based on the fee type priority:

Select the student from the Start Page.

Choose "Fee Transactions".

Click "Distribute" in the Transaction column.

Enter the Date of this transaction.

Enter a description.

Enter the amount of the payment.

Select the Payment Method.

Enter a Payment Reference number, such as a check number.

How to Issue a Refund:

NOTE: A refund may only be issued if the student's overall "Global" balance is negative.

On the Start Page, select the Student. Go to the Fee Transactions page.

Click "Refund".

Enter the Date of the Transaction.

Enter an explanation in the Description field.

Enter the Amount of the credit.

Select a Payment Method.

Enter a Payment Reference Number, such as a check number. Click Submit.

How to Void a Fee:

Select the student. Go to the Fee Transactions page.

Click on the "Payment" link on the line for the fee to be voided.

Date: Enter a date for this transaction.

Transaction Type: Select "Void".

Description: Optional.

Amount: Leave the amount BLANK.

Payment Method: Choose "Other".

Payment Reference Number: Optional.

Click Submit.

How to Issue a Credit:

Select the student. Go to the Fee Transactions page.

Click on the "Payment" link on the line for the fee to be voided.

Date: Enter a date for this transaction.

Transaction Type: Select "Credit".

Description: Optional.

Amount: Enter the amount of the credit.

Payment Method: Choose "Other".

Payment Reference Number: Optional.   Click Submit

How to Print a Fee Receipt (or Invoice):

For an individual student:

     Select a student; click on "Print A Report" (top left corner of page)

     Use the drop-down list to select your fees report. Click Submit.

For a group of students:

     Select a group of students; from the group functions list that appears beneath the list of names, select Print Report. Use the drop-down list to select your fees report. Click Submit.

Fee Search Commands:

Students who have an outstanding balance: *fee_balance.balance>0 (greater than zero)

Students who have a zero balance: *fee_balance.balance=0

               OR: *fee_balance.balance=

To add a New Fee:

Start Page > School > Fee Types > New

Enter the name of the fee.

Select the fee category.

Optionally, enter a description.

Click Submit.

To Create a List of Students Who Owe:

Search for the students who owe: *fee_balance.balance>0

From the Group Functions list, select List Students.

Enter a title for your report.

Select fields to appear on the report in the left column.

Type column headers for each field in the right column.

One of the fields should be: <mark>fee_getstudentbalance</mark>

Column header for this field could be "Balance".

For Padding in Each Cell, enter a number, such as 2, 3 or 4.

For Other Options, suggest checking "Gridlines".

For Optional: Sort Field Name, Suggest Lastfirst.

Click Submit.

Here is an example:

Student List - 35 students will be listed

Report Title (shown at top of page): Outstanding Fees

Col		Field Name	Column Title
1.	Fields	lastfirst	Name
2.	Fields	Student_Number	Student No.
3.	Fields	Fee_GetStudentBalance	Balance
4.	Fields		
5.	Fields		
6.	Fields		
7.	Fields		
8.	Fields		
9.	Fields		
10.	Fields		

Padding In Each Cell		3 (in points)
# Rows In Between Breaks		
Other Options		☑ Gridlines ☐ Export

Optional: Sort Field Name	**Direction**
LastFirst	> ▾
	> ▾
	> ▾