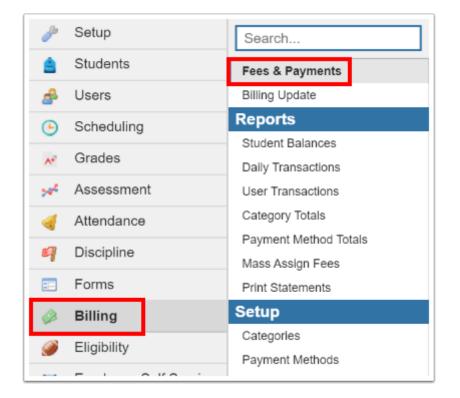
# **Fees & Payments**

The Fees & Payments screen is used to add fees to an individual student, such as fees for sports, field trips, and overdue library books. Payments received by the school can also be documented.

**()** Fees can be mass assigned to a group of students using <u>Mass Assign Fees</u>.

# Adding a Fee to an Individual Student

1. In the Billing menu, click Fees & Payments.



**2.** On the Search Screen, enter search criteria to locate the student and click **Search**.

Search Screen Simple List Customized List Student Search	
Student More Search Options	Student Group N/A  Search All Schools Include Inactive Students
	Search Reset

#### **3.** In the search results, click the appropriate student.

Search Screen Simple L	ist Customized List Customize Student List	t		
Student: albury				
2 Students 📑			Search	15 AN
Photo	Student	Student ID	Grade	
2	Albury,		09	
3	Albury,		12	

4. In the blank row next to the plus sign, select the School Year and School.

										Display	y Paid Fe	es - 🗌 Include Vo	ided Fees -	Save
Dem	ographic	En	rollment Sche	edule Requests	Grades	Absences	Activities	Referra	als Test History	Grad	SSS	Fees & Payments	Search	
No F	ees were	foun	d.									Search		18-82 18-82
	Status	ID	School Year	School					Category			Created By	Description	
+			2019-2020 🗸	Owl High School	- 0041			~	Library Fees		```	✓ Weiss,		
4														)

### **5.** Select the fee **Category**.

						Display Paid Fe	es - 🗌 Include Voi	ided Fees - Save
Demo	ographic	En	rollment Sche	dule Requests Grades Absences Activities Ref	ferra	ls Test Grad SSS	Fees & Payments	Search
No F	ees were	four	nd.				Search	18-24 18-24
	Status	ID	School Year	School		Category	Created By	Description
+			2019-2020 🗸	Owl High School - 0041	~	Library Fees	Veiss,	
•								•

The Created By field is auto-populated with your name.

### 6. Enter a **Description** of the fee.

							Display Pa	aid Fees	- 🗌 Include Voi	ded Fee	es - Save
Demographic Enrollme	nt Schedule Requests	Grade	es Absences	Activities R	eferrals	Test History	Grad SS	SS F	ees & Payments	Sear	ch
No Fees were found.									Search		200
	Category		Created By	Description	Publ	ish Date	Due Date	Am	ount		Amount ^ Due
~	Library Fees	~	Weiss,	Overdue book	Jun	9, 2020	Jun 9, 2020	0			N/A
								Tota	al:		\$0.00 🗸
4											۱.

**7.** Edit the **Publish Date** as needed. This is the date the fee will be published to the Parent/ Student Portal.

#### 8. Edit the **Due Date**.

								Displa	y Paid	Fees -	Include Voi	ded Fees -	Save
Demographic En	rollment Sch	edule Requests	Grades	Absences	Activities	Referrals	Test History	Grad	SSS	Fees	& Payments	Search	
No Fees were four	nd.									_	Search		16.65 15.65
	Created By	Description	Publish I	Date		Due Date				Amour	nt	An Du	nount e
~	Weiss,	Overdue book	June	<b>v</b> 9 <b>v</b>	2020 🗸 🗖	June	✓ 16	<b>~</b>   2020	~ 🗖			N//	4
										Total:		\$0.	.00
4													E F

**9.** Enter the **Amount** of the fee. For whole dollar amounts, such as 5 dollars, simply enter 5. The ".00" will be automatically added after clicking Save.

							Display Pai	d Fees -	Include Void	ded Fee	s - Save	
Demographic I	Enrollment Sc	hedule Requests	Grades Absence	s Activities	Referrals	Test History	Grad SSS	Fees	& Payments	Searc	ch	
No Fees were fo	und.								Search		18.25	2
	Created By	Description	Publish Date		Due Date	•		Amour	nt		Amount Due	-
~	Weiss,	Overdue book	June V 9	<ul> <li>✓ 2020 &lt;&gt; □</li> </ul>	June	✓ 16 ✓	/ 2020 🗸	5			N/A	
								Total:			\$0.00	Ŧ
•											► E	

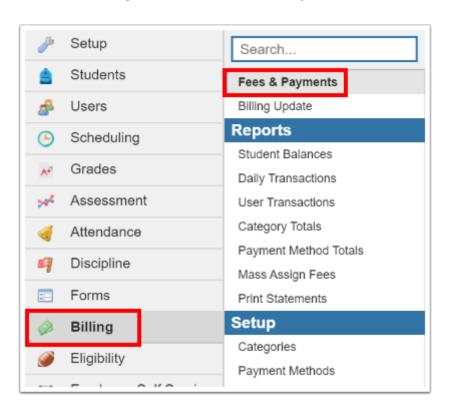
#### 10. Click Save.

								Display	Paid F	ees -	Include Void	led Fees	Sav
Demographic Er	nrollment Sch	edule Requests	Grades	Absences	Activities	Referrals	Test History	Grad \$	SSS	Fees	& Payments	Search	1
No Fees were fou	nd.										Search		25
	Created By	Description	Publish I	Date		Due Date				Amoui	nt		Amount Due
~	Weiss,	Overdue book	June	<b>v</b> 9 <b>v</b>	2020 🗸 🗖	June	✓ 16	/ 2020 ~	•=	5			N/A
										Total:		4	\$0.00
1													ł

After being added, fee information cannot be edited. If there is a mistake in the fee, it must be voided. The fee will remain on the student's record as a void. See <u>Voiding a</u> <u>Fee</u> for more information.

# Adding a Payment

When the school receives a non-special type payment (such as a check or cash) for a student's fee, the payment can be documented in Fees & Payments. Special type payments (PayPal.com - Credit Card, PayPal.com - Checkout, eCheck.Net, and Authorize.Net) must be completed by the parent or student in the Parent/Student Portal.



1. In the Billing menu, click Fees & Payments.

2. On the Search Screen, enter search criteria to locate the student and click Search.

Student Search	
Student More Search Options	Student Group N/A  Search All Schools Include Inactive Students
	Search Reset

#### **3.** In the search results, click the appropriate student.

Search Screen Simple List	Customized List Customize Student List		
Student: albury			
2 Students 📑			Search
Photo	Student	Student ID	Grade
	Albury		09
	Albury		12

**4.** Next to the appropriate fee, click the triangle.

												Display Paid	l Fees - 🗌 Inclu	de Voided Fees -	Save
Dem	ographic	: Er	roll	ment Schedul	e Requests Grades	Absences	Activities	Referra	ls Test History	Grad S	SS	Fees & Paymen	ts Search		÷
1 Fe	e 📑												Search		76.87 13°20
	Status		ID	School Year	School				Category			Created By	Description	Publish Date	Due D
	Unpaid	Void	14	2019-2020	Owl High School - 0041				Library Fees			Weiss,	Overdue book	Jun 9, 2020	Jun 16
+				2019-2020 🗸	Owl High School - 0041			~	Library Fees		~	Weiss,		Jun 9, 2020	Jun 9,
t 📃															

#### 5. Select the Date Paid.

Dem	ographic	c Er	nroll	ment Schedu	le Requ	ests Grades	Absences	Activities	Referrals	Test History	Grad	SSS	Fees & Paymen	ts Search		<b>→</b>
1 Fe	e 📳													Sea	rch	14.50
	Status		ID	School Year	School				(	Category			Created By	Description	Publish Da	te Due I
•	Unpaid	Void	14	2019-2020	Owl High	School - 0041			l	ibrary Fees			Weiss,	Overdue book	k Jun 9, 2020	Jun 1
	ID	Payn	nent	Entered By		Date Paid				Payment I	lethod		Payment Info		Amount	
		Weis	s,			June V 9	9 🗸 2020 🗸			Check 🗸						

### 6. Select the Payment Method.

Only non-special type payment methods are available for selection.

Dem	ographic	: Er	nroll	ment Schedu	le Requ	ests Grades	Absences	Activities	Referrals	Test History	Grad	SSS	Fees & Paymen		nclude Voided Fee	→
1 Fe	e 📊													Sea	arch	26.50 26.50
	Status		ID	School Year	School				(	Category			Created By	Description	n Publish Da	te Due I
•	Unpaid	Void	14	2019-2020	Owl High	School - 0041			l	ibrary Fees			Weiss,	Overdue boo	ok Jun 9, 2020	Jun 16
	ID	Paym	nent	Entered By		Date Paid				Payment I	Nethod		Payment Info		Amount	
		Weis	s,			June 🗸	9 ~ 2020 ~	- 🔳		Check 🗸						

**7.** Enter any **Payment Info**, such as a check number when paid by check.

		_								Test						clude Voided F	
	ographic e 🖳	: Er	nrolli	ment Schedu	le Requ	ests Grades	Absences	Activities	Referrals	Test History	Grad	SSS	Fees & Paym	ients	Search.		
	Status		ID	School Year	School				с	ategory			Created By	(	Description	Publish	
•	Unpaid	Void	14	2019-2020	Owl High	School - 0041			LI	brary Fees			Weiss,	(	Overdue book	Jun 9, 20	:0 Jur
	ID	Payn	nent	Entered By		Date Paid				Payment M	Nethod		Payment Inf	0		Amount	
		Weis	s,			June 🗸	9 ~ 2020 ~	- 📰		Check 🗸			Check # 123	34			

**8.** Enter the **Amount** of the payment. For whole dollar amounts, such as 5 dollars, simply enter 5. The ".00" will be automatically added after clicking Save.

					Display Paid Fe	es - 🗌 Inc	lude Voided Fees -	Save
Demographic Enrollment Schedule Requests	Grades Absences Activit	ies Referrals	Test G History G	rad SSS Fee	s & Payments	Search		<b>&gt;</b>
1 Fee 📴						Searc	ch	262
loo	Category	Created By	Description	Publish Date	Due Date	Amount		Amount Due
High School - 0041	Library Fees	Welss,	Overdue book	Jun 9, 2020	Jun 16, 2020	\$5.00	ş	\$5.00
Date Paid	Payment Method	Payment Info		Amount			Running Total	
June v 9 v 2020 v	Check 🗸	Check # 1234		5			N/A	

## 9. Click Save.

						Display Paid F	ees - 🗆 Ind	clude Voided Fees	- Save
Demographic Enrollment Schedule Requests	Grades Absences Activit	ies Referrals	Test History	Grad	SSS Fees	s & Payments	Search.		<b>&gt;</b>
1 Fee 📴							Sear	ch	12.52
lool	Category	Created By	Description		Publish Date	Due Date	Amount		Amount Due
High School - 0041	Library Fees	Weiss,	Overdue book	(	Jun 9, 2020	Jun 16, 2020	\$5.00		\$5.00
Date Paid	Payment Method	Payment Info		Amo	unt			Running Total	
June v 9 v 2020 v	Check V	Check # 1234		5				N/A	

If the fee was fully paid, the fee is removed from the screen. Paid fees can be viewed by selecting **Display Paid Fees** at the top of the screen. The **Status** displays as Paid on the fee.

Dem	ographic	c Er	nroll	ment Schedul	e Requests Grades	Absences	Activities	Referra	ls Test History	Grad S		Display Paid Fees & Payment		Voided Fees -	Save
1 Fe	e 📑												Search		18-50 18-50
	Status		ID	School Year	School				Category			Created By	Description	Publish Date	Due D
	Paid	Void	14	2019-2020	Owl High School - 0041				Library Fees			Welss,	Overdue book	Jun 9, 2020	Jun 16
+				2019-2020 🗸	Owl High School - 0041			~	Library Fees		~	Weiss,		Jun 9, 2020	Jun 9,
(															•

If a fee was partially paid, the **Amount Due** on the fee will be updated to display the balance that is due. The **Status** displays as Partial.

Demoç	graphic	En	rollr	ment Sche	dule Requests	Grades Absences Activities Re	eferrals	Test History Grad	SSS Fees	& Payments			Search		<b>→</b>
Fee	E.												Search		
s	tatus	I	D	School Year	School		Category	y	Created By	Description	Publish Date	Due Date	Amount		Amo Due
P	artial <u>V</u>	<u>/oid</u> 1	15 2	2019-2020	Owl High School - 00	41	Field Trip	Fees	Weiss, Ashley	End of Year Trip	Jun 9, 2020	Jun 19, 2020	\$100.00		\$25.
			ID	Payment E	ntered By	Date Paid		Payment Method	Payment	Info	Amount			Running Total	
	Refund		9	Weiss,		Jun 9, 2020		Cash			\$50.00			\$50.00	
	Refund		10	Weiss,		Jun 11, 2020		Cash			\$25.00			\$25.00	
				Weiss,		June    9    2020    =		Check 🗸						N/A	

**10.** To print a receipt for a payment, click the printer icon next to the payment. Follow your printer's prompts to print the receipt.

													Display Paid F	Fees - 🗆 Inclu	ude Voided Fees	- Save
Den	nograp	hic	Enro	llme	ent Sched	ule Requests	Grades Absences Activities Re	ferrals	Test History Grad	SSS Fees	& Payments			Search		•
1 Fe	e 📳													Search		255 [255]
	Statu	IS	ID	Sc	hool Year	School		Category	1	Created By	Description	Publish Date	Due Date	Amount		Amoun Due
-	Partia	l <u>Void</u>	15	20	19-2020	Owl High School - 004	11	Field Trip	Fees	Weiss,	End of Year Trip	Jun 9, 2020	Jun 19, 2020	\$100.00		\$25.00
			ID		Payment Ent	tered By	Date Paid		Payment Method	Payment	Info	Amount			Running Total	
đ	Re	efund	9		Weiss,		Jun 9, 2020		Cash			\$50.00			\$50.00	
Ê	R	efund	10		Weiss,		Jun 11, 2020		Cash			\$25.00			\$25.00	
					Weiss,		June 🗸 9 🗸 2020 🗸 🗖		Check 🗸						N/A	

# **Refunding a Payment**

1. In the **Billing** menu, click **Fees & Payments**.

🥜 Setup	Search
🚖 Students	Fees & Payments
🛃 Users	Billing Update
Scheduling	Reports
💉 Grades	- Student Balances Daily Transactions
🛹 Assessment	User Transactions
🦪 Attendance	Category Totals
₽ Discipline	Payment Method Totals Mass Assign Fees
E Forms	Print Statements
🧼 Billing	Setup
Eligibility	Categories Payment Methods

**2.** On the Search Screen, enter search criteria to locate the student and click **Search**.

Search Screen Simple List Customized List	
Student Search Student More Search Options	Student Group N/A  Search All Schools Include Inactive Students
	Search Reset

**3.** In the search results, click the appropriate student.

Search Screen Simple List	Customized List Customize Student L	ist	
Student: albury			
2 Students			Search Ba
Photo	Student	Student ID	Grade
	Albury,		09
	Albury,		12

**4.** Next to the appropriate fee, click the triangle.

Dem	nographic	; E	nrol	Iment Sched	ule Requests Grades Absences /	Activities Refe	errals Test Grad SS History Grad SS		lay Paid Fees - 🗌 Payments Sear		I Fees - Save
2 Fe	es 📳								Se	earch	14 AN
	Status		ID	School Year	School		Category	Created By	Description	Publish Date	Due Date
▶	Paid	Void	14	2019-2020	Owl High School - 0041		Library Fees	Weiss,	Overdue book	Jun 9, 2020	Jun 16, 2020
•	Partial	Void	15	2019-2020	Owl High School - 0041		Field Trip Fees	Weiss,	End of Year Trip	Jun 9, 2020	Jun 19, 2020
+				2019-2020 ~	Owl High School - 0041	~	Library Fees V	Weiss,		Jun 9, 2020	Jun 9, 2020
4											•

### **5.** Next to the payment, click **Refund**.

Den	nographi	ic E	nrol	Iment Sched	ule Requests	Grades Absences Activities Ref	ferrals	Test Grad S History	SS Fees &	Payments S	earch	
2 Fe	es 📊										Search	
	Status		ID	School Year	School		Categor	у	Created By	Description	Publish Date	Due Date
•	Paid	<u>Void</u>	14	2019-2020	Owl High School - 00	41	Library Fe	ees	Weiss,	Overdue book	Jun 9, 2020	Jun 16, 2020
			ID	Payment En	tered By	Date Paid		Payment Method	Payment	Info	Amount	
đ	Refu	nd	8	Weiss,		Jun 9, 2020		Check	Check # 1	234	\$5.00	
				Weiss.		June v 9 v 2020 v 🚍		Check ~				

6. At the top of the screen, enter the **Refund Reason**.

**7.** For a partial refund, enter the **Refund Amount**. For a full refund, leave the Refund Amount blank.

#### **8.** Click **OK**.

Confirm Refund	
	Are you sure you would like to refund this payment?
	Payment ID: 8 Fee ID: 14 Amount: \$5.00
	Refund Reason: Fee waived
Refun	nd Amount(Leave Blank if Full):
	OK Cancel

The **Status** on the fee updates to Refund. The **Amount Due** is updated to reflect the balance due.

														Display Paid	Fees - 🗌 Inclu	de Voided Fees	- Save
Dem	ograp	hic	Enr	olln	nent Schedu	ile R	equests Grades Absences Activities	Ref	errals Test History	Grad	SSS Fees	& Payments			Search		•
2 Fee	s 📑														Search		18.87
	Statu	s	10	s	chool Year	School			Category		Created By Des		Publish Date	Due Date	Amount		Amou Due
•	Refun	d <u>Voi</u> d	1	2	019-2020	Owl High	h School - 0041		Library Fees	Weiss, Ov		Overdue book	Jun 9, 2020	Jun 16, 2020	\$5.00		\$5.00
		ID P	ayn	ent	Entered By		Date Paid	Pay	Payment Method Payment Info				Amount	Running Total	I		
		8 <u>V</u>	/eiss				Jun 9, 2020	Che	eck	Check # 1	Check # 1234			\$5.00			
e	5	11 Weiss, Jun 9, 2020				Jun 9, 2020	Refu	und	Refund for	Refund for Payment #8: Fee waived			-\$5.00				
		v	leis	s, A	shley		June 🗸 9 🗸 2020 🗸 🗐	Ch	neck 🗸							N/A	

The refund is added as a line in the payment info. The **Payment Method** displays as Refund, and the **Payment Info** includes the refund reason that was entered.

)em	ographi	ic	Eni	roll	lment Sched	lule R	Requests Grades Absences Activities	Ref	errals Test History	Grad	SSS Fees	& Payments			Search		<b>→</b>
Fee	es 📳														Search		
	Status		10	D	School Year	School	ol	Category			Created By	Description	Publish Date	Due Date	Amount		Amo Due
-	Refund	Voi	<u>d</u> 1	4	2019-2020	Owl Hig	gh School - 0041	Library Fees		Weiss, Overdue		Overdue book	Jun 9, 2020	Jun 16, 2020 \$5.00			\$5.0
	ID	F	ayn	ner	nt Entered By		Date Paid	Payment Method Payment Inf			Info		Amount	Amount			al
	8	V	Veiss	<u>s,</u>			Jun 9, 2020	Che	eck	Check # 1	234		\$5.00	\$5.00			
	11	V	Veiss	<u>s,</u>			Jun 9, 2020	Ref	und	Refund for	r Payment #8: Fee	waived	-\$5.00			\$5.00	
		v	Veis				June 🗸 9 🗸 2020 🗸 🗐	Ch	neck 🗸							N/A	

**9.** To print a receipt for the refund, click the printer icon next to the refund. Follow your printer's prompts to print the receipt.

								Test			play Paid Fees -		
Dem	ographi	C E	nrol	Iment Sched	ule R	equests Grades Absences Activities	Ref	errals Test History	Grad S	SS Fees &	Payments Se	arch	<b>→</b>
Fee	es 📳											Search	22
	Status		ID	School Year	School			Category		Created By	Description	Publish Date	Due Date
	Refund	Void	14	2019-2020	Owl High	h School - 0041		Library Fees		Weiss,	Overdue book	Jun 9, 2020	Jun 16, 2020
	ID	Pa	yme	nt Entered By		Date Paid	Pa	yment Method	Payment	Info		Amount	
	8	We	iss,			Jun 9, 2020	Che	eck	Check # 12	34		\$5.00	
	11	We	iss,			Jun 9, 2020	Ref	fund	Refund for	Payment #8: Fee	walved	-\$5.00	
		We	eiss,			June v 9 v 2020 v	Cł	neck 🗸					

# Voiding a Fee

Fees that do not have any payments can be voided. If you attempt to void a fee that has a payment, an error message will display. You must refund any associated payments before you can void the fee.

1. In the **Billing** menu, click **Fees & Payments**.

🌽 Se	ətup	Search
🚖 St	tudents	Fees & Payments
🝰 U:	sers	Billing Update
🕒 So	cheduling	Reports
<b>∧</b> Gi	rades	Student Balances Daily Transactions
💉 As	ssessment	User Transactions
🦪 At	tendance	Category Totals
Di	iscipline	Payment Method Totals Mass Assign Fees
📰 Fo	orms	Print Statements
🧼 Bi	illing	Setup
🏈 EI	igibility	Categories Payment Methods

**2.** On the Search Screen, enter search criteria to locate the student and click **Search**.

Search Screen Simple List Customized List	
Student Search Student More Search Options	Student Group N/A    Search All Schools  Include Inactive Students
	Search Reset

**3.** In the search results, click the appropriate student.

Search Screen Simple List	Customized List Customize Student L	ist	
Student: albury			
2 Students			Search Ba
Photo	Student	Student ID	Grade
	Albury,		09
	Albury,		12

**4.** Next to the appropriate fee, click **Void**.

Fees 🚰												
s	Status		ID	School Year	School	Category	Created By	Description	Publish Date	Due Date		
R	Refund	Void	14	2019-2020	Owl High School - 0041	Library Fees	Welss,	Overdue book	Jun 9, 2020	Jun 16, 202		
P	Partial	Void	15	2019-2020	Owl High School - 0041	Field Trip Fees	Weiss,	End of Year Trip	Jun 9, 2020	Jun 19, 202		
R	Refund	Void	16	2019-2020	Owl High School - 0041	Lunch Fees	Weiss,	Lunch balance due	Jun 9, 2020	Jun 23, 202		
U	Inpaid	Void	17	2019-2020	Owl High School - 0041	Lost/Damaged School Items	Welss,	Damaged math book	Jun 9, 2020	Jun 10, 202		
F				2019-2020 🗸	Owl High School - 0041	Library Fees	Weiss,		Jun 9, 2020	Jun 9, 202		

**5.** At the top of the screen, enter the **Void Reason**.

#### **6.** Click **OK**.

Confirm Void
Are you sure you would like to void this fee?
Void Reason: Fee waived
OK Cancel

The fee is removed from the screen. To view fees that have been voided, select **Include Voided Fees** at the top of the screen.

Voided fees have a **Status** of Void.

	Display Paid Fees      C Include Voided Fees Save emographic Enrollment Schedule Requests Grades Absences Activities Referrals Test History Grad SSS Fees & Payments Search												
	Status		ID	School Year	School		Category	Create	ed By	Description	Publish Date	Due Date	
▶	Refund	Void	14	2019-2020	Owl High School - 0041		Library Fees	Weiss,	-	Overdue book	Jun 9, 2020	Jun 16, 2020	
	Partial	Void	15	2019-2020	Owl High School - 0041		Field Trip Fees	Weiss,		End of Year Trip	Jun 9, 2020	Jun 19, 2020	
▶	Refund	Void	16	2019-2020	Owl High School - 0041		Lunch Fees	Weiss,		Lunch balance due	Jun 9, 2020	Jun 23, 2020	
	Void	Void	17	2019-2020	Owl High School - 0041		Lost/Damaged School Items	Weiss,		Damaged math book	Jun 9, 2020	Jun 10, 2020	
+				2019-2020 🗸	Owl High School - 0041	~	Library Fees ~	Weiss	,		Jun 9, 2020	Jun 9, 2020	