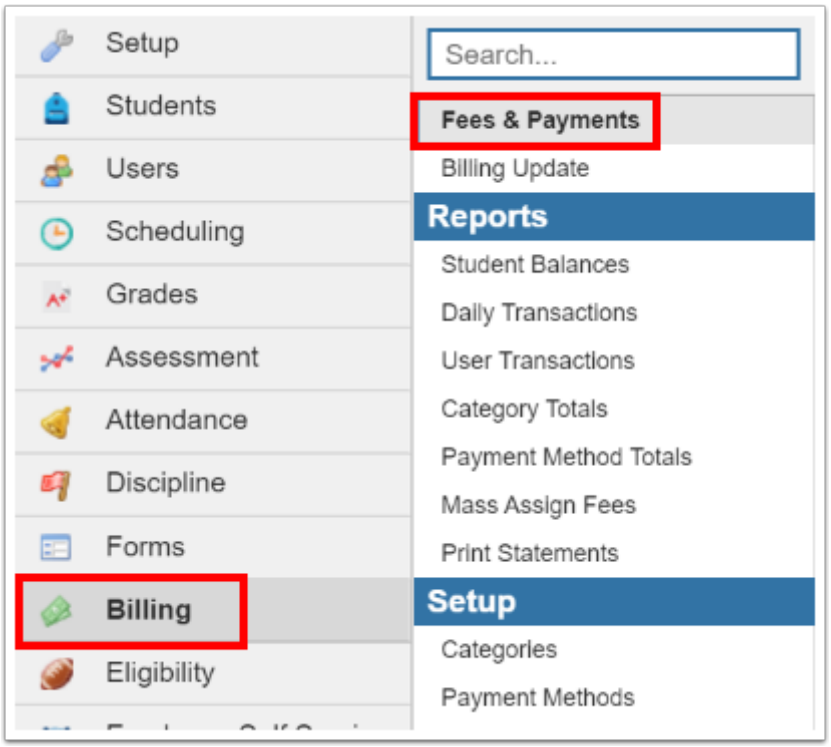
Fees & Payments

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.

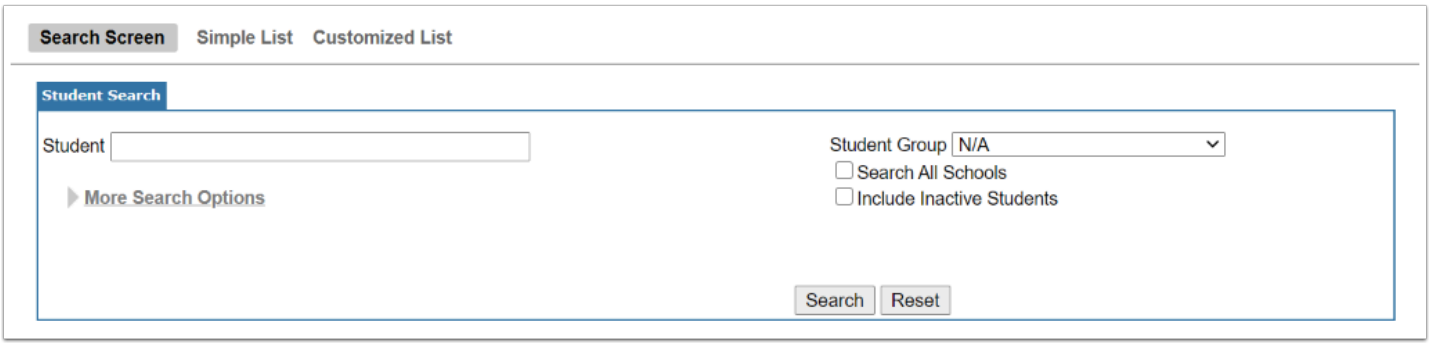
Fees can be mass assigned to a group of students using Mass Assign Fees.

Adding a Fee to an Individual Student

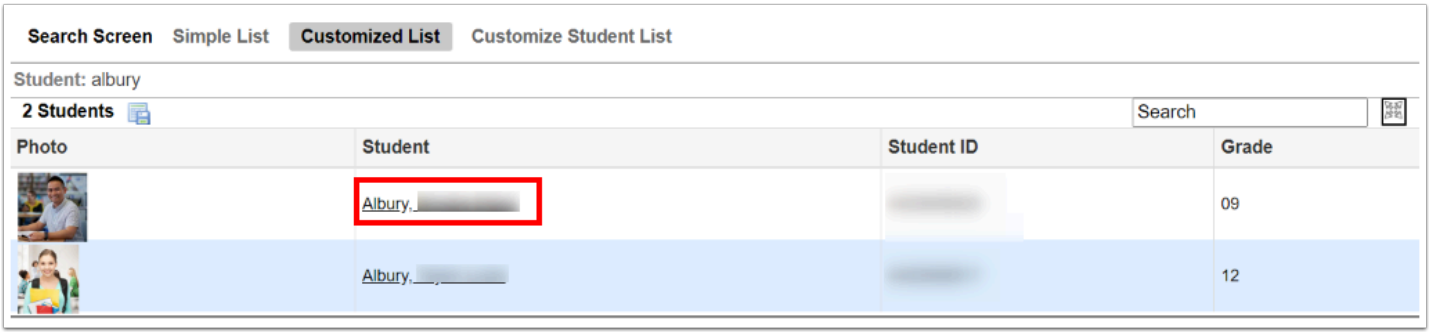
1. In the **Billing** menu, click **Fees & Payments**.



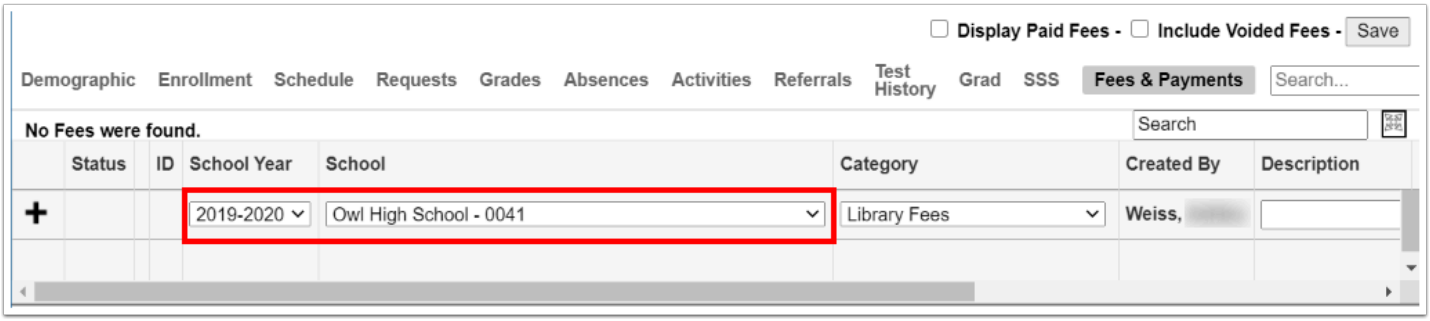
2. On the Search Screen, enter search criteria to locate the student and click **Search**.



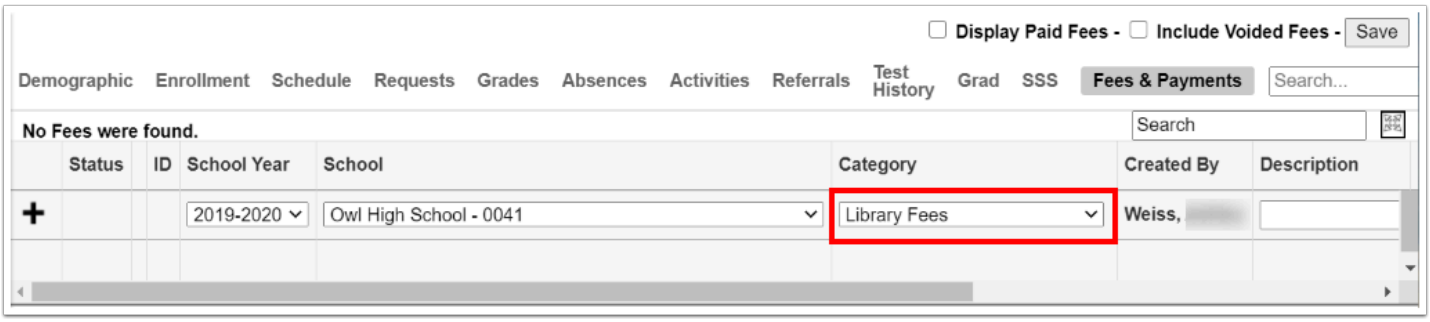
3. In the search results, click the appropriate student.



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

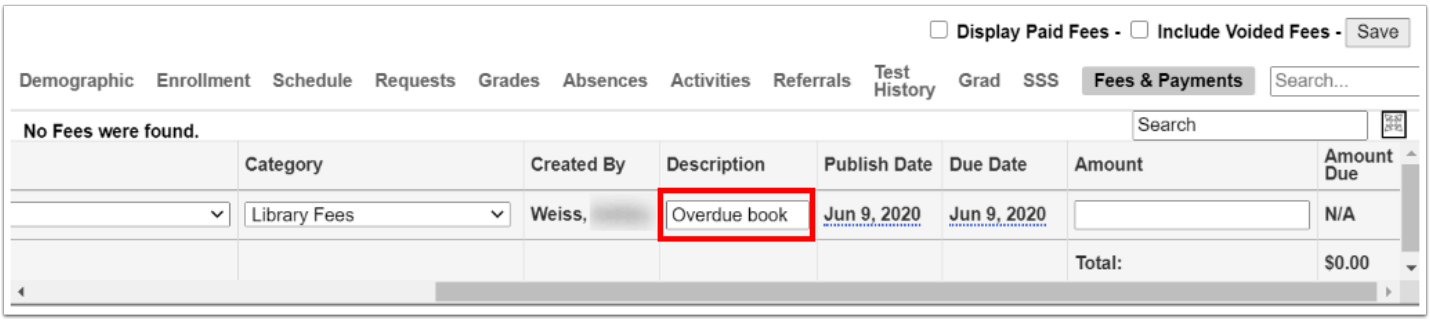


5. Select the fee **Category**.



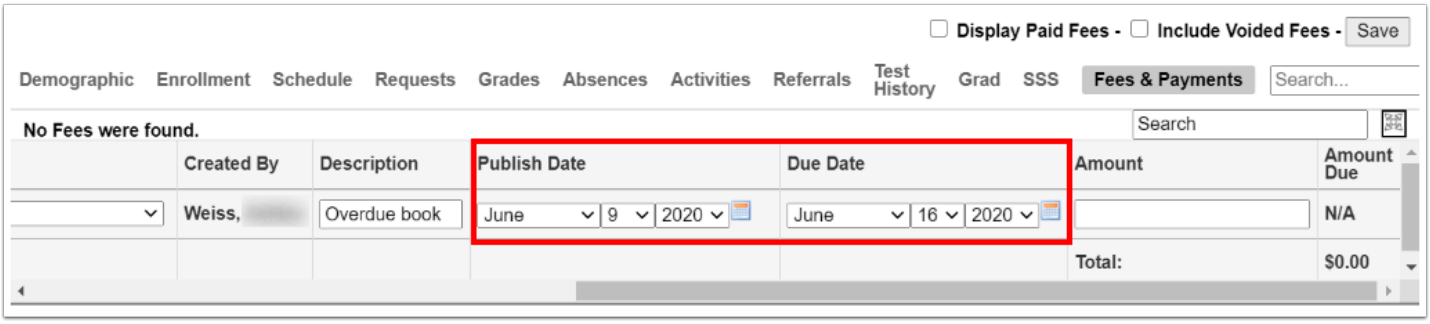
The Created By field is auto-populated with your name.

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

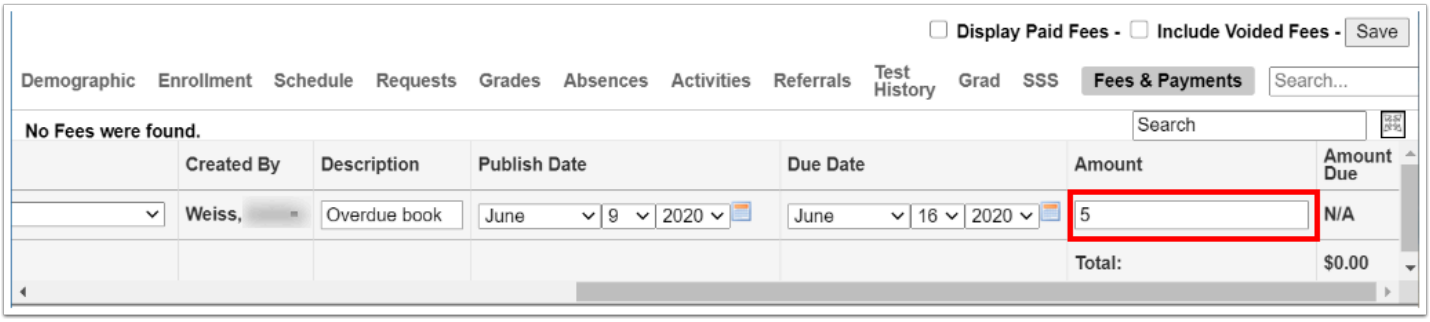


7. Edit the **Publish Date** as needed. This is the date the fee will be published to the Parent/ Student Portal.

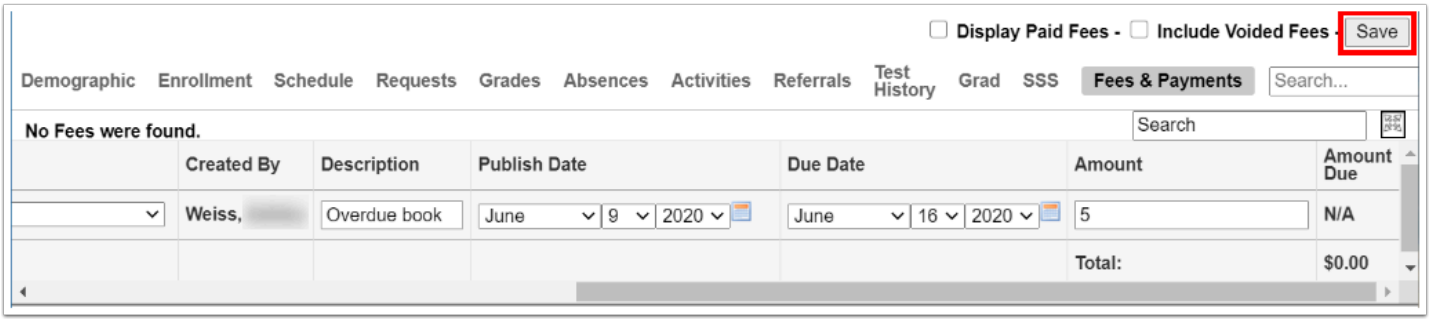
8. Edit the **Due Date**.



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.



10. Click **Save**.

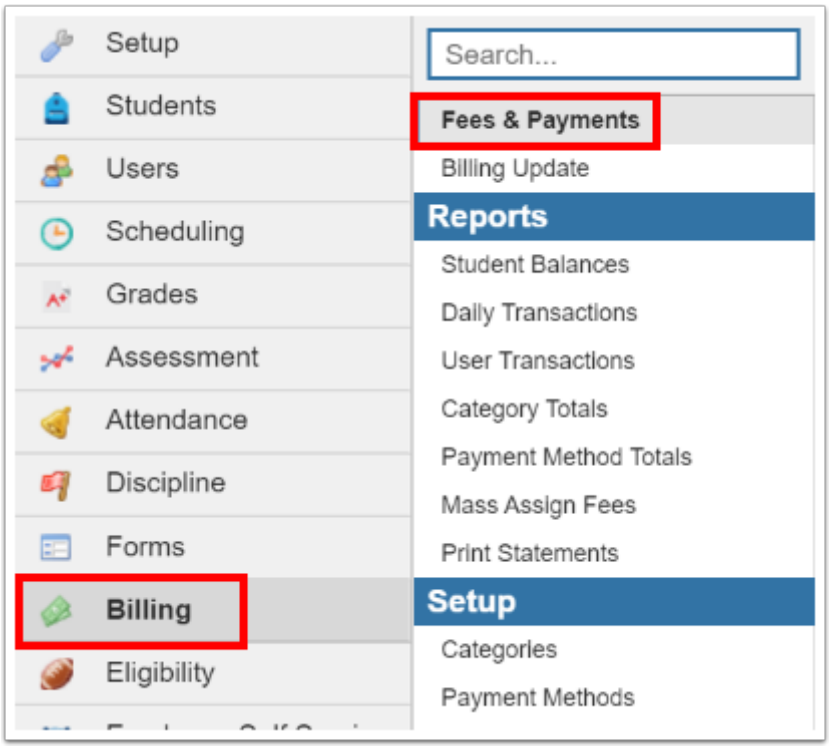


After being added, fee information cannot be edited. If there is a mistake in the fee, it must be voided. The fee will remain on the student's record as a void. See Voiding a Fee for more information.

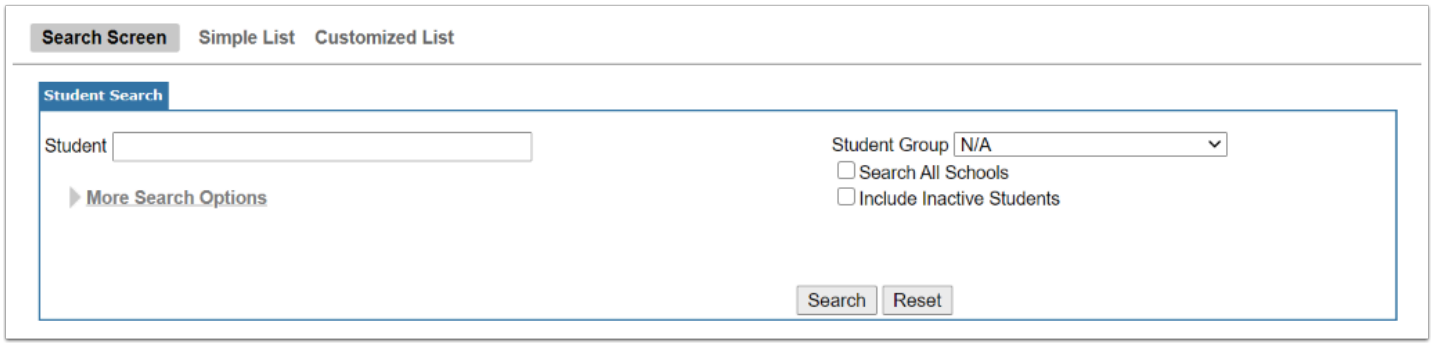
Adding a Payment

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.

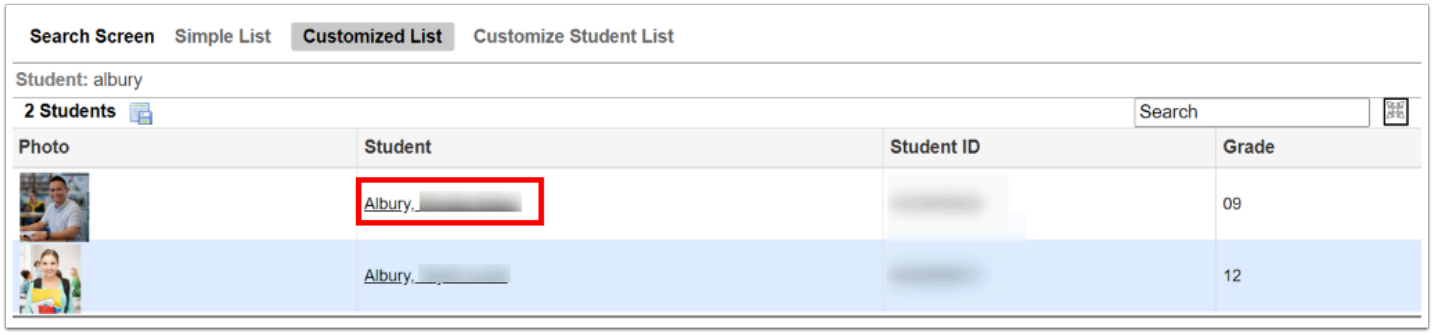
1. In the **Billing** menu, click **Fees & Payments**.



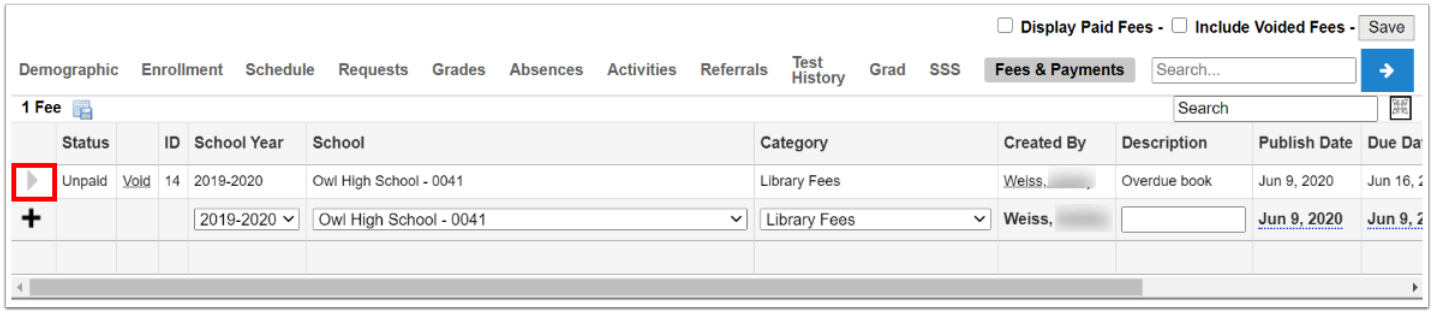
2. On the Search Screen, enter search criteria to locate the student and click **Search**.



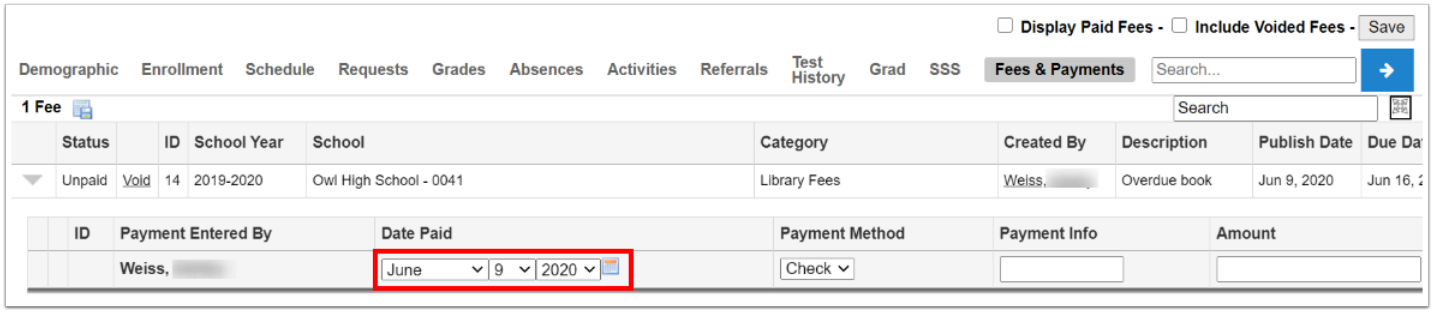
3. In the search results, click the appropriate student.



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

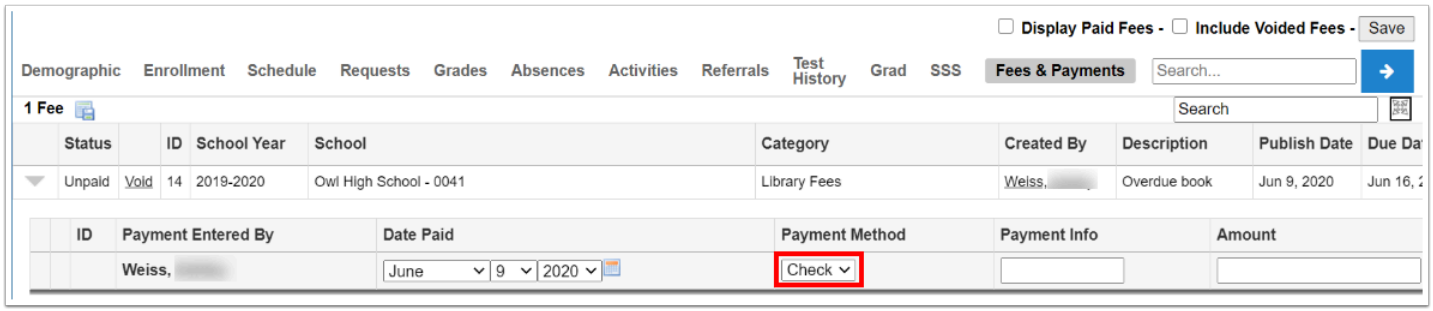


5. Select the **Date Paid**.

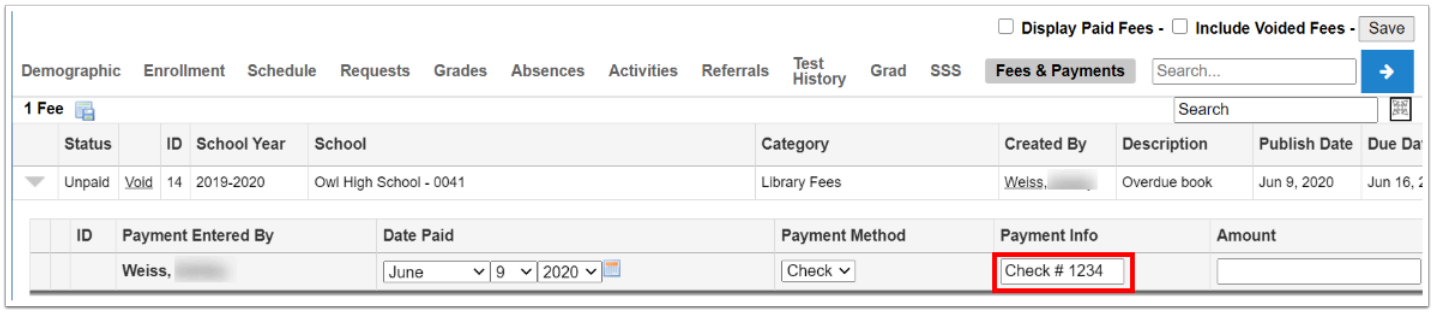


6. Select the **Payment Method**.

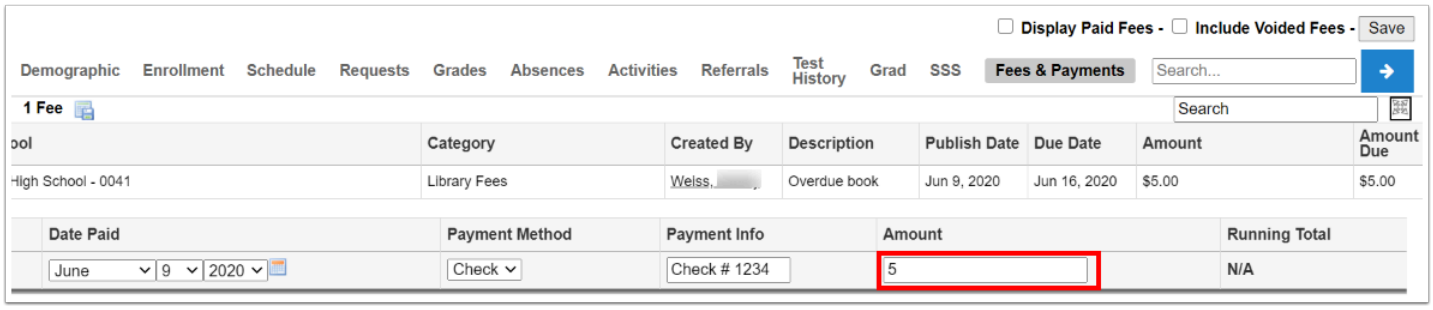
Only non-special type payment methods are available for selection.



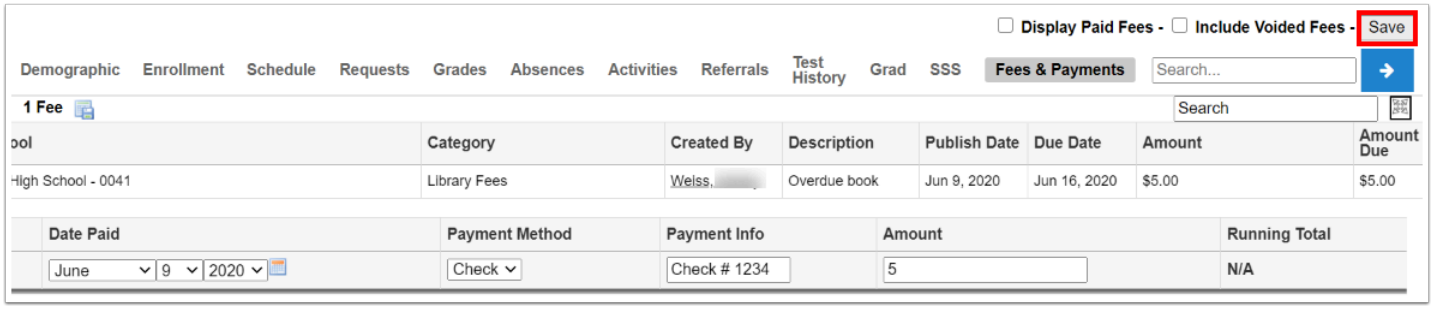
7. Enter any **Payment Info**, such as a check number when paid by check.



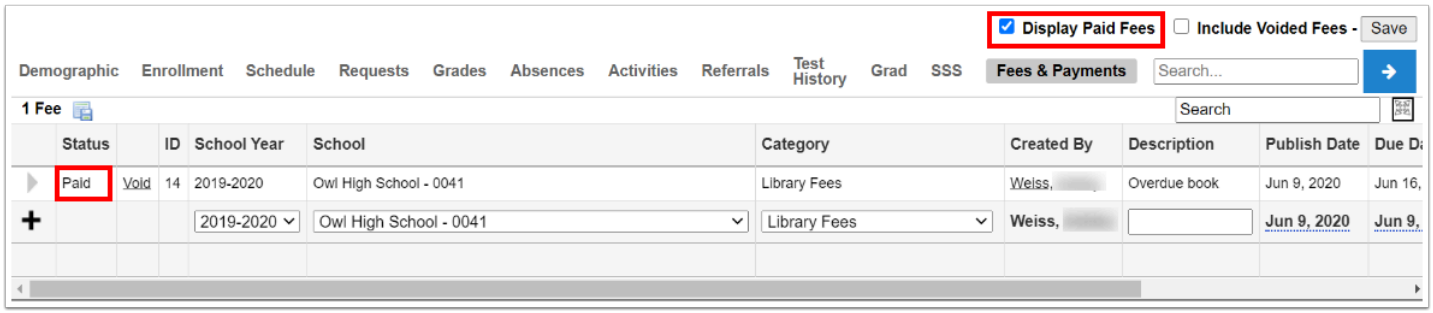
8. Enter the **Amount** of the payment. For whole dollar amounts, such as 5 dollars, simply enter 5. The ".00" will be automatically added after clicking Save.



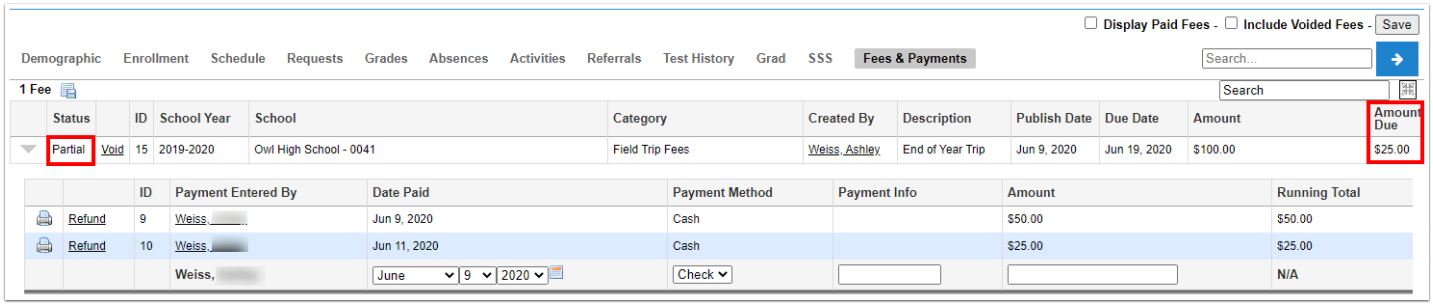
9. Click **Save**.



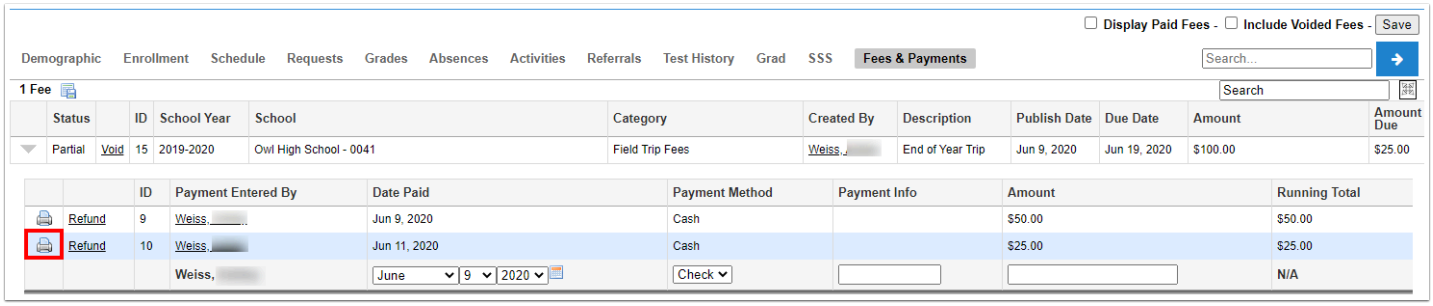
If the fee was fully paid, the fee is removed from the screen. Paid fees can be viewed by selecting **Display Paid Fees** at the top of the screen. The **Status** displays as Paid on the fee.



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.

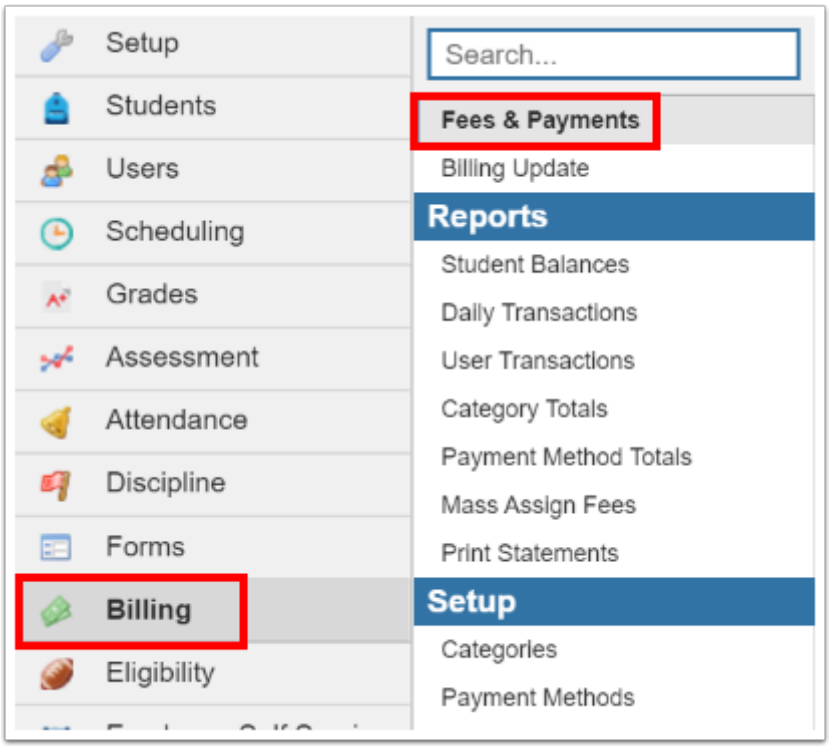


10. To print a receipt for a payment, click the printer icon next to the payment. Follow your printer's prompts to print the receipt.

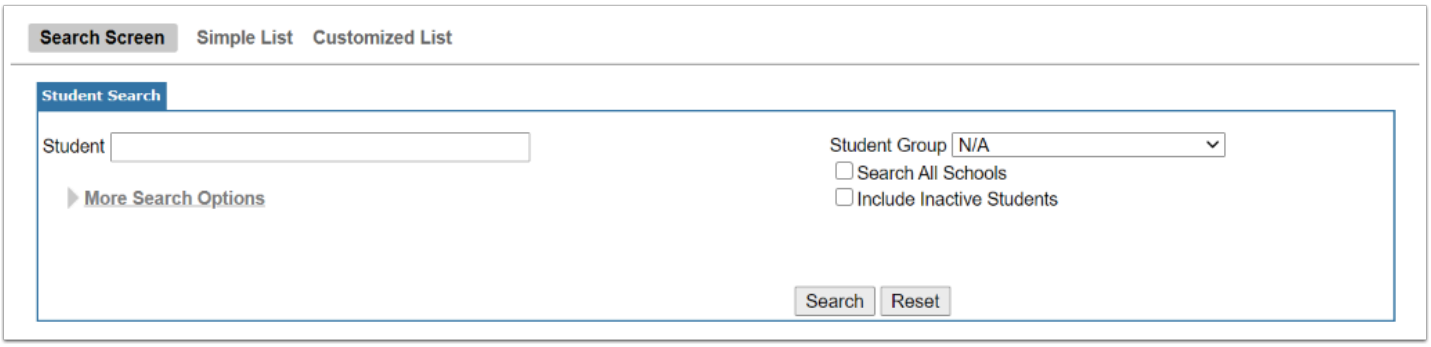


Refunding a Payment

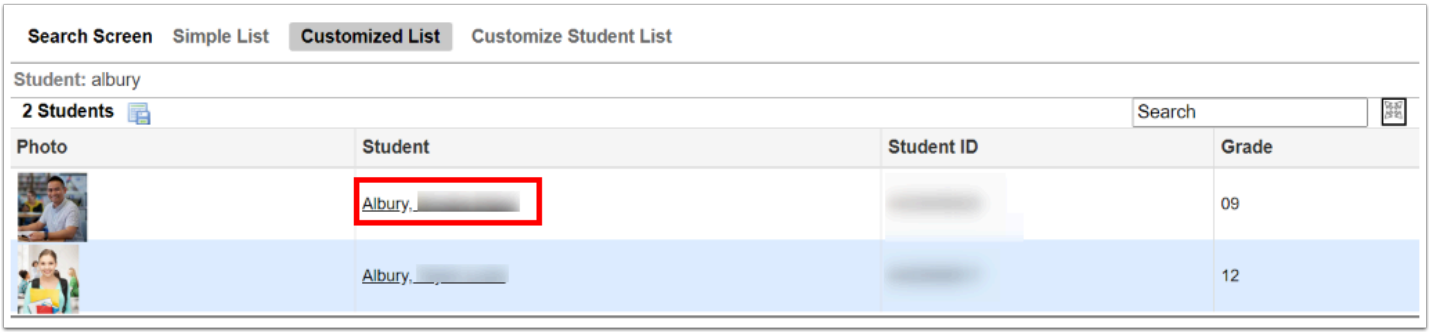
1. In the **Billing** menu, click **Fees & Payments**.



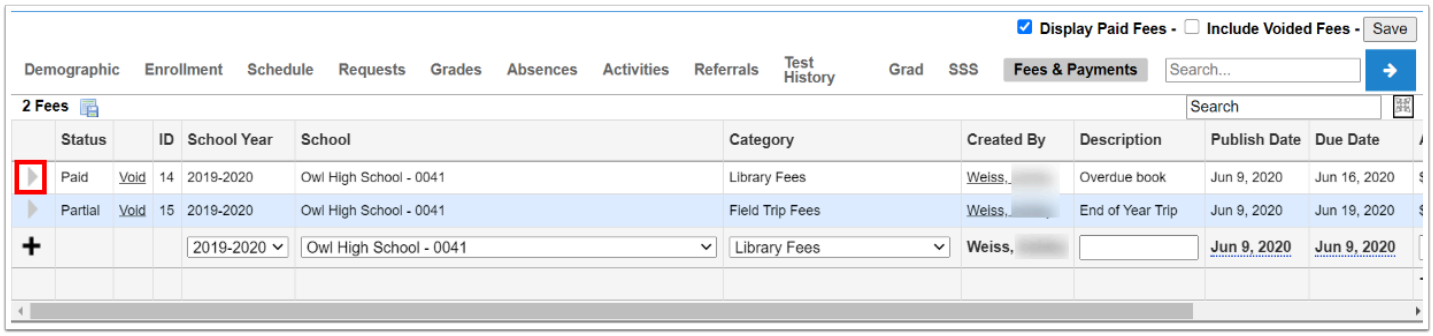
2. On the Search Screen, enter search criteria to locate the student and click **Search**.



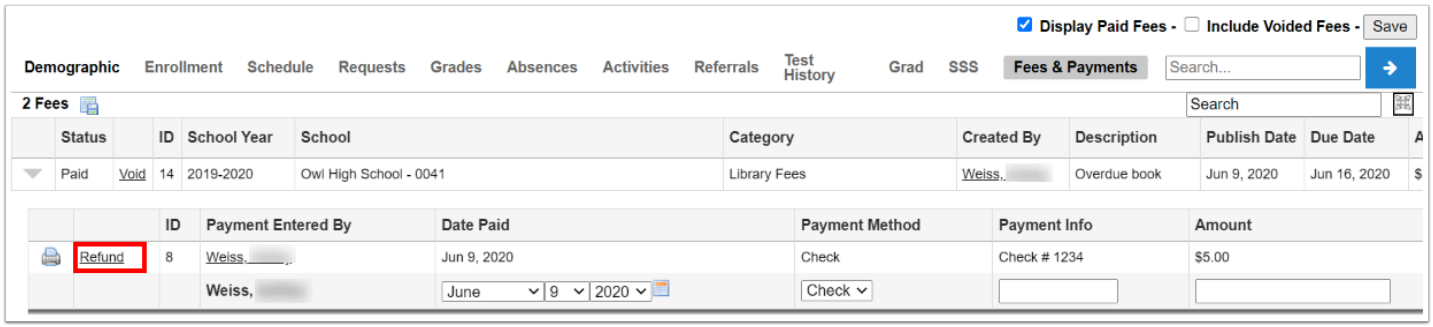
3. In the search results, click the appropriate student.



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



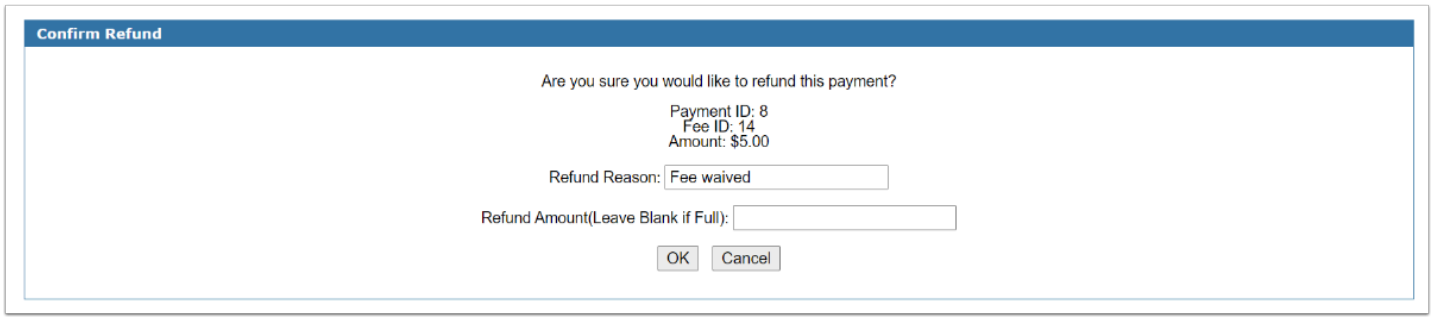
5. Next to the payment, click **Refund**.



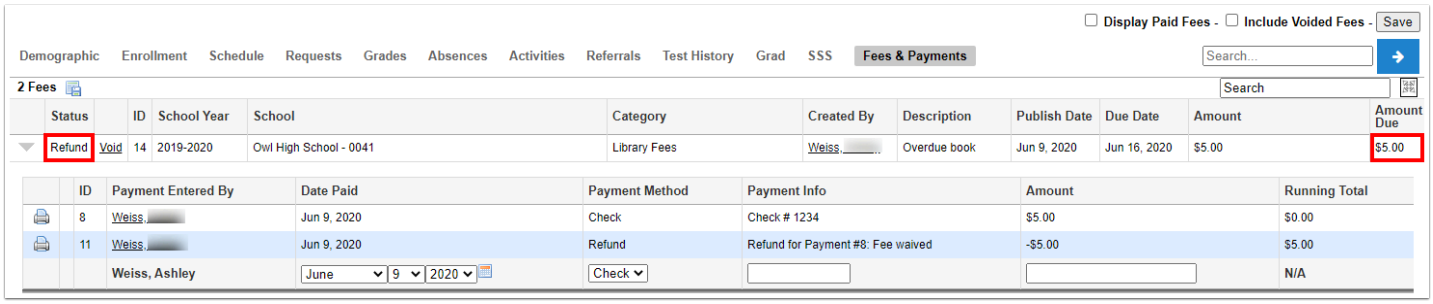
6. At the top of the screen, enter the **Refund Reason**.

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

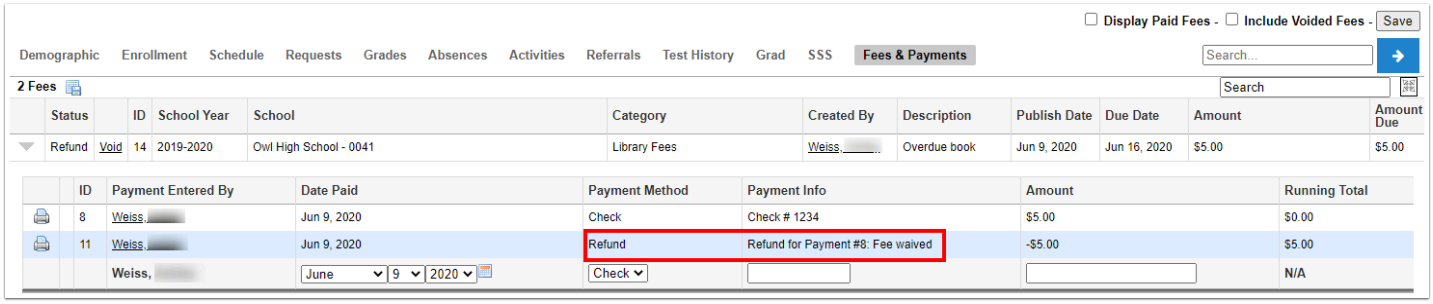
8. Click **OK**.



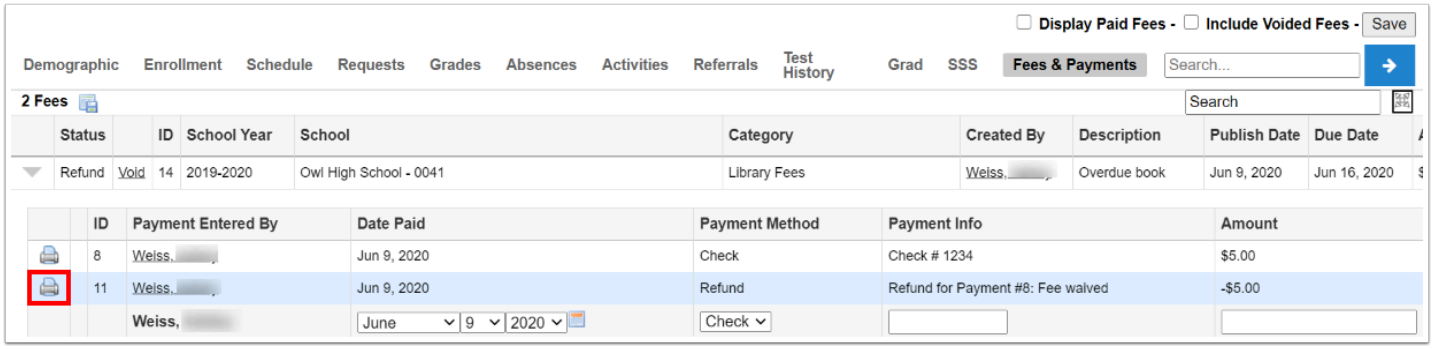
The **Status** on the fee updates to Refund. The **Amount Due** is updated to reflect the balance due.



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.



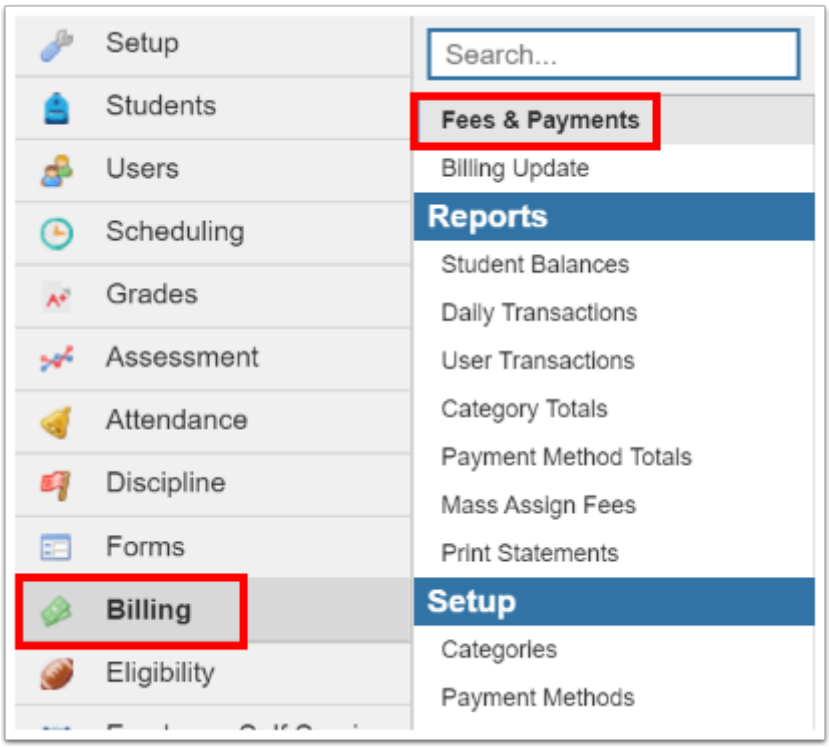
9. To print a receipt for the refund, click the printer icon next to the refund. Follow your printer's prompts to print the receipt.



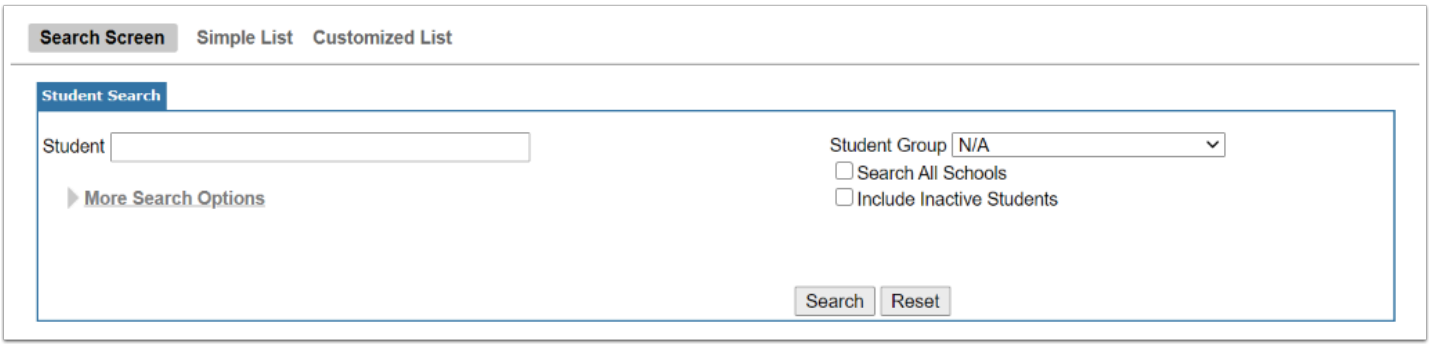
Voiding a Fee

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.

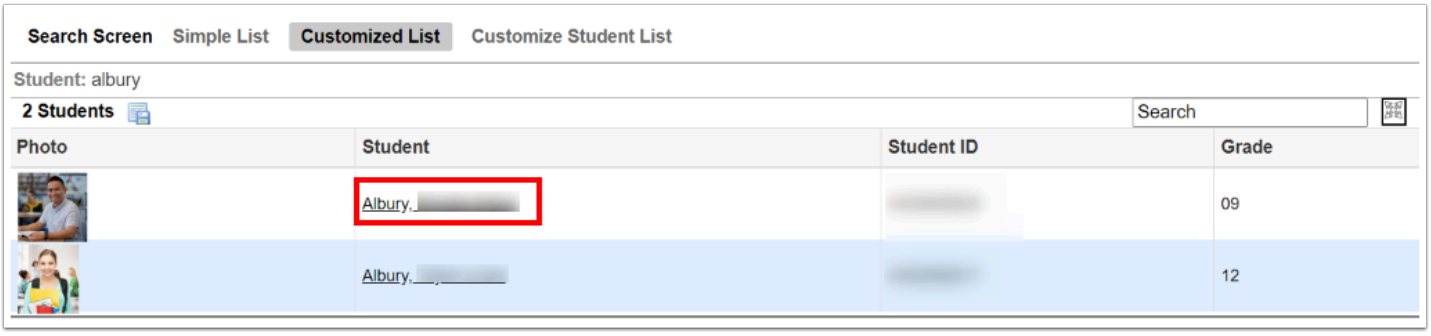
1. In the **Billing** menu, click **Fees & Payments**.



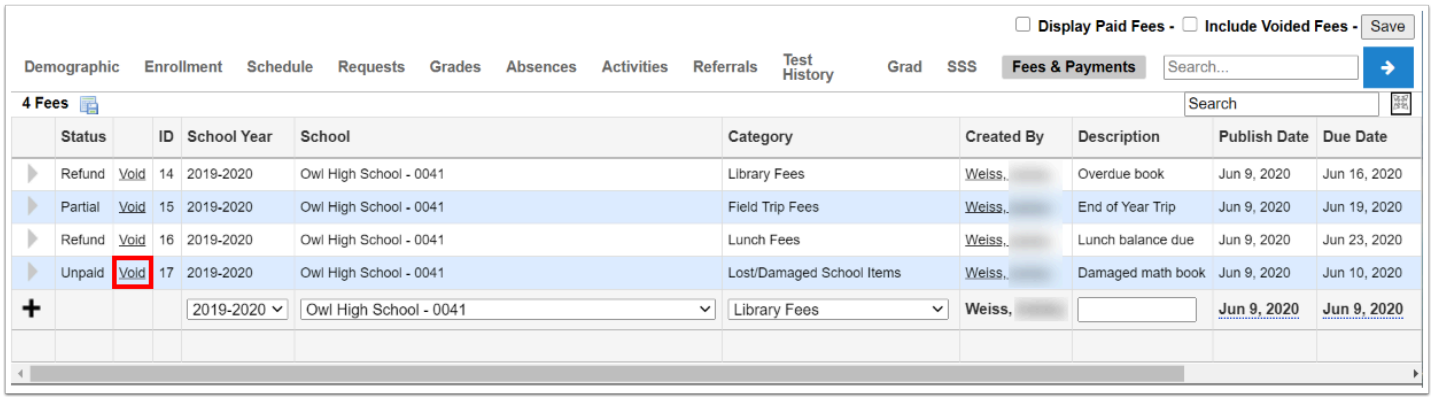
2. On the Search Screen, enter search criteria to locate the student and click **Search**.



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

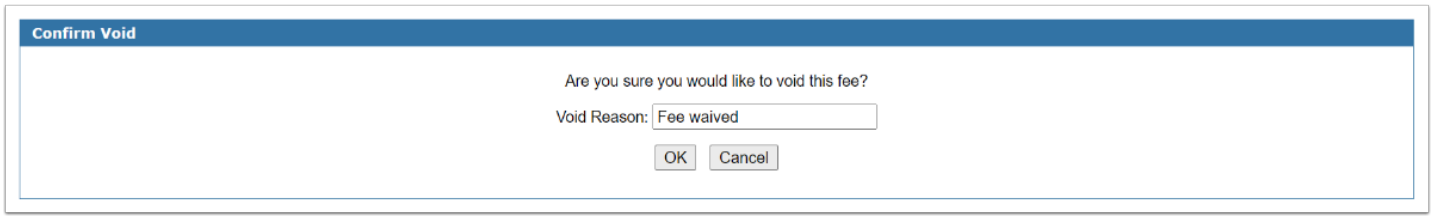


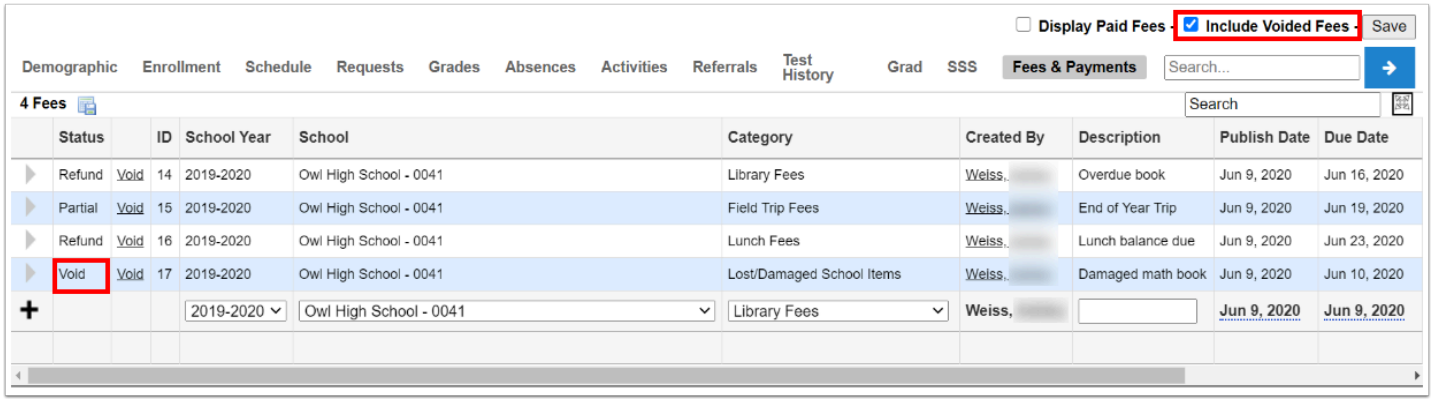
4. Next to the appropriate fee, click **Void**.



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

6. Click **OK**.



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.