Student Fee Settings

There are two places where fee exemption is set up – at the School level for all students (District > Schools/School Info > *individual school*), and on the individual student (*student selection* > Other Information).

If setting up fees in the middle of the school year, it is essential to set the Fee Exemption Status to "Students Exempted from All Fees" on the Schools/Schools Info for each building to avoid inadvertent fees from being assessed while working in the live environment. Once fee set up is complete this setting should be modified to "Students Not Exempted", and the Fee Exemption Status controlled on an individual basis throughout the school year.

Any students who should be exempted from school and/or course fees should be set. These can be mass-updated. To mass modify using the Student Field Value function, you need to select students with the same type of exemption status, and then using the Student Field Value function, change the "Fee_Exemption_Status" field to one of the following values:

> 0 = "Student Not Exempted"
> 1 = "Student Exempted from Course Fees"
> 2 = "Student Exempted from School Fees"
> 3 = "Student Exempted from All Fees"

Prior to setting up fees, you will need to determine at what level Parents will be notified of balances. These settings are found under the individual schools by navigating to School > Balance Alert Setup. If you are not prepared for parents to receive balance alerts, you may set this to a high limit until your fees are established and applied.

Fee Setup

In setting up Fees, there are both District and School settings involved.

It is recommended that prior to entering any Fee settings your District and Schools work together towards a common set of Fees and Payment Priorities so that ALL of your Schools are operating on the same page.

Fee Categories (District)

At the District Level, the first step is to set up Fee Categories. Examples of Fee Categories may include:

> Tuition -   Consumable Materials -   Activities -   Course

These categories simply provide Districts with a way to categorize their Fees.

To set up a Fee Category from the District Office:

1. Click the **District** Link
2. Click **Fee Categories**
3. Click **New** and enter Fee Category Name (limited to 20 characters)

NOTE: Fee Categories apply to **ALL** Schools within the district
If you plan on charging Course Fees, you MUST define a Fee Category of: Course

Although it is not recommended if there are historical records tied to a category, you may edit existing entries by clicking on the Category Name.

Payment Methods (District)
Again, at the District Level, you will need to define Payment Methods that may be used in your District.

To set up a Payment Method from the <u>District</u> Office:

1. Click the **District** Link
2. Click **Payment Methods**
3. Click **New**
4. Enter a **Code** and **Description** for each Payment Method

NOTE: Payment Methods apply to ALL Schools within the District.

Although it is not recommended if there are historical records tied to a Payment Method, you may edit existing entries by clicking on either the Code or Payment Method Name.

Fee Types (School)

Fee Types are set at the School level and allow a school to more specifically define fees, assign these fees to a Fee Category and assign a Priority number to the Fee itself. Fee types apply only to the specific school setting them up.

To setup a Fee Type from the <u>School</u> Start Page:

1. Click the **School** Link
2. Click **Fee Types** (General)
3. Click **new** – define the Fee Type (50 Characters), Fee Category (drop down), Fee Type Description
4. Click **Submit**

Your Fee Type list will look similar to this:

	New	
Fee Types	**Category**	**Priority**
Tuition	School	1
Biology Lab Fee	Course	2
Physics Lab Fee	Course	3
Parking Fee	School	4
Textbook Rental Fee	School	5

When setting up your Fee Types, be sure to give some thought to the **Priority** you wish to assign them. This becomes critical as payments are applied; they are applied to fees in priority order. It is important that you control the way payments are applied, then be sure to reflect this by giving that fee a higher priority (lower number).

CONNECT
Connecting you with Technology

Enrollment Fees (District)

When setting up your School Fee Types, you may wish to include fees that will apply to every student when they are enrolled in the school (such as Handbook, Technology or General fees). You would set up the fee type at the school first and would need a "Fee Type" that is using a "Fee Category" of **School** . Then, it is applied to the school under the School/Schools Info tab.

Set up the Enrollment Fee:

Be in the school you are setting up the Fee Type.

1. Create the School Fee to be considered the Enrollment Fee.
   Go to School > Fee Types > New.

New Fee Type

Label	Value	
Fee Type	School	(Limit 50 characters)
Fee Category	School	
Fee Type Description		

Example:

General Fees Student Handbook	School

2. Set up the School Fee as a School Enrollment Fee.
   Go to District – Schools/School Info

New School Enrollment Fee

Label	Value
School Name	Brookside High School
Fee Type	
Department	LOCKER FEE STUDENT PLANNER
Amount	
Date	08/25/2013 (MM/DD/YYYY)
Description	
Pro Ratable	☐

School Fee Information

Fee Exemption Status	Students Not Exempted
School Enrollment Fees	New

Fee Type	Amount
No enrollment fees for this school.	

CONNECT
Connecting you with Technology

Fee Assessment

Applying Fees to Students (School)
Fees may be mass assigned or assigned by individual student. In many instances, a school may wish to mass assign a specific fee to a specific group of students.

Examples of this type of fee include:

• Mass Assign a Book Use Fee to ALL Students
• Mass Assign a Cap & Gown fee to ALL SENIORS

To Mass Assign a fee:
(For example, to mass assign a Cap & Gown fee to all seniors)

1. From the **School Start Page**
2. Search for Seniors by clicking on the **Grade** 12 link
3. This should bring up a list of all Seniors
4. From **Group Functions**,
5. Select **Fee Functions**
   At this screen you can perform many different group functions depending on what your needs are.

Function	Description
New Fee	Add a fee for currently selected students.
New School Enrollment Fee	Add a school enrollment fee for currently selected students.
New Course Enrollment Fee	Add a course enrollment fee for currently selected students.
New Transaction	Add a transaction for currently selected students.
Assess School Enrollment Fees	Automatically assign school enrollment fees to students.
Assess Course Enrollment Fees	Automatically assign course enrollment fees to students.
Clear Current Balance	Create transaction opposite to each non null fee balance.
Reverse Action Using Group Transaction ID	Reverse an action by using the group transaction ID.

6. For our example, click NEW FEE
7. Enter the Fee Information

Field	Value
Add Fee For	The selected 109 students
Fee Type	Cap & Gown Fee (Graduation Fees)
Department	
Transaction Date	4/23/2007
Description	Senior Cap & Gown Fee
Amount of Fee	20.00

8. Click Submit.

The Fee will then be assessed to all of the selected students. Altering your search – selection criteria allows you to mass assign fees to various groups.

To view a student's Fee information, be sure that student is a selected, and then click on the Fee Transactions link (under Administration). This section allows you to view the Student's Fee transactions, make a payment, or assign a new fee to this individual student.

Assigning a Fee to a Specific Student (School)

1. Search for the student you wish to assign a fee to
2. Once their information is displayed on the screen, click Fee Transactions under the Administration Menu on the left.
3. In the upper left hand corner – select the fee from the dropdown list that you wish to assign, and fill in the necessary information.
4. Click Submit

The fee will be displayed on the Fee Transaction screen for that student.

| 04/23/2007 | Overdue Book 9 | Overdue Book | 5.00 | 0.00 | 5.00 | 0.00 | 5.00 | Payment |

In addition to displaying individual Fees, a Running Balance is also displayed.

Assigning Course Fees (School)

Course Fees can be set up so that as a Student Enrolls in the Course, the Fee is automatically assessed and if desired, the fee can be prorated to accommodate the Student's shortened time span in the course.

Should Course Fees be set up after Registration, the Fees can be Mass Assigned to those students enrolled in the Course.

Here are the steps involved in setting up and assigning Course Fees

- At the District Level – be sure to set up a Fee Category called Course
- At the School Level – be sure to set up a Fee Type describing any and all Course Fees. For example, you may set up Fee Types Biology Lab Fee or Woodworking – Shop Fee
- Assign the Fee to the Course

Assigning the Fee at the Course:
1. From the School Level – Click on School
2. Click on Courses (under Scheduling)
3. On the left, click the Course Title you wish to assign the Fee to
4. Course information is displayed
5. Click on the Fees link at the top of that page
6. Click NEW and complete the necessary information
7. Click Submit

   NOTE: Pro-Rating of fees is available; however, it does cause some confusion and issue when it is applied. Use caution when determining if Pro-Rating of fees is desired.

Assessing Course Fees to a Student's record will automatically occur when a student adds this Course to their schedule and is displayed on the Fee Transaction screen for that student.

NOTE: If the student later drops the Course, the fee is NOT automatically removed.

Mass Assigning a Course Fee after the Students are Already Enrolled in the Course
Often times Course Fees are established after Scheduling has been completed and students are already enrolled in the Course. To assess these Course Fees you would need to do the following: (This assumes you have already set up the Course Fee as described above)

NOTE: You will need to know the Course Number for each Fee you wish to mass assign.

From the School Start Page:
1. Locate the students enrolled in the Course by typing a search command in the search box. EXAMPLE: *enrolled_in=ART1100 (ART1100 is the Course Number)
2. This should select all students enrolled in the specific Course
3. From the Group Functions drop down, select Fee Functions
4. Select New Course Enrollment Fee
5. Enter the Course Number
6. Click SUBMIT
7. You will see a secondary screen where you will indicate to apply the fee to the X number of selected students as well as a checkbox to include the description of the fee.
8. Click Submit

In this example, clicking SUBMIT will assign the fee to the 55 selected students who are enrolled in Chemistry 1 – SCI2000. The new fee will appear on each student's Fee Transactions screen.

You will need to repeat the process for each Course that contains a fee that was added after students were enrolled in Courses.

Payments/Credits/Voids

Applying Payments:
Payments are applied to individual students. You may apply payments in two methods:
1. Apply a payment directly to a specific fee
2. Have a payment Distributed across ALL fees according to priority

In order to apply payments using either method, you must start from the individual student's Fee Transactions screen.

To apply a payment directly to a specific fee:
1. Click the Payment link to the far right of that specific fee listing
2. Enter the Description, Amount, Payment Method and Reference Number
3. Click Submit
4. The amount of payment will be applied to that specific fee.

To distribute a payment over several fees according to priority:
NOTE: It is not recommended to use the Distribute option if fees are not prioritized or if the amount of the Payment is not equal to the balance due.

1. Click the Distribute link at the bottom right hand side.
2. Enter the Description, Amount, Payment Method and Reference Number
3. Click Submit
4. The amount paid will be distributed to any and all unpaid fees in order of priority.

The Student's Fee Transactions page provides a running record of Fee and Payment transactions. This screen lists each assessed fee, Payment and Balance information. In addition, there are two links located at the bottom of the screen.

Credits and Voids
Experience has shown that when pro-rating fees, the credit and void functions do not provide desired results. Use caution when using these two Transaction Types.

Credits
Credits are generally used when a fee has been applied but the student has been classified as Free and Reduced, and you need to track that a Credit has been applied to reduce the amount of the fee. The process is the same as applying a payment; however, the Credit Transaction Type is instead selected.

Voids
Due to integrations with third-party vendors and the processes that occur in PowerSchool when using the Void option, it is no longer recommended that you use this.

If you need to remove a fee, PowerSchool 10 introduced a Delete button. The Delete button can be located by clicking on the date of the fee. It will be grayed out and unavailable for use if there are any transactions (such as payments, credits, or Applied Credits) associated with the fee. To delete the fee, click the Delete button and then click the Confirm button to complete the deletion.

Viewing Transaction History

All Transactions and history are viewed from the selected student's Fee Transaction screen.

Create New Fee							Balance: 68.00			Refund
Date	**Course**	**Fee Type**	**Priority**	**Description**	**Charged**	**Adjust.**	**Fee**	**Paid**	**Balance**	**Transaction**
08/26/2014		ART 1	2	ART 1 14-15	8.00	0.00	8.00	0.00	8.00	Payment
08/26/2014		8th Grade Fee	1	8th Grade Fee 2014-2015	60.00	0.00	60.00	0.00	60.00	Payment
08/27/2013		7TH Grade Fee FY13/14	1	7TH GRADE FEE	45.50	0.00	45.50	45.50	0.00	
						Totals:	113.50	45.50	68.00	Distribute
				All Transactions Fee Balances						

Click on the Date to see the details of the specific fee.
Click on the Paid amount to see the details of the specific fee payment.

Click on the Fee Balances link at the bottom of the Fee Transaction screen.

Fee Searches
You may find the students who have a fee balance or who have individual fees that have a balance due.

Overall Fee Balance = *fee_balance.balance > 0
Individual Fee Balance = *fee.fee_balance > 0

You may use these searches to send home letters to only those who owe fees. Or you may choose <= 0 and print report cards for only those who have already paid all of their fees.

Fee Letters

CONNECT has created two letters than can be used/modified to send home to parents. These are reports that are run just like report cards.

To run fee letters:
1. Select the student(s)
2. Choose Print Report
3. Select the NCC Fee Letter or NCC Fee Invoice
4. Click Submit

Fee Reports

There are several reports that can be run at the school level.

From the Custom Reports tab (System Reports > Custom Reports tab):
      Fee Transaction Report
      Fees Report

From the sqlReports 4 tab (System Reports > sqlReports 4 tab > expand the Fees category):
      Daily Fee Transaction Report