

## Fees (People)

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<u>Assign and Edit Fees | Adjust Fees | Pay Fees | Void a Fee Assignment, Payment, or Adjustment | Make a Deposit (Surplus) | Make Refund from Surplus Amount</u>

Tool Search: Fees

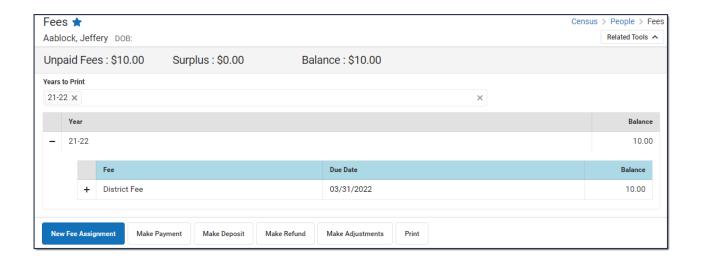
The Fees tool lists all fees that have been assigned to a person, including all payments and adjustments and a total of how much is still owed or if a surplus exists. If the person has reached the maximum fee amount established by the school and/or district, that will be noted in the Fees Editor.

If a fee was paid using an online payment, the fee Assignment, Payment or Adjustment **CAN** be voided or exempted.

The other option is to use the <u>Payments Reporter</u> to refund the payment.

#### What can I do?

- Assign and Edit Fees
- Adjust Fees
- Pay Fees
- Void a Fee Assignment, Payment, or Adjustment
- Make a Deposit (Surplus)
- Make Refund from Surplus Amount



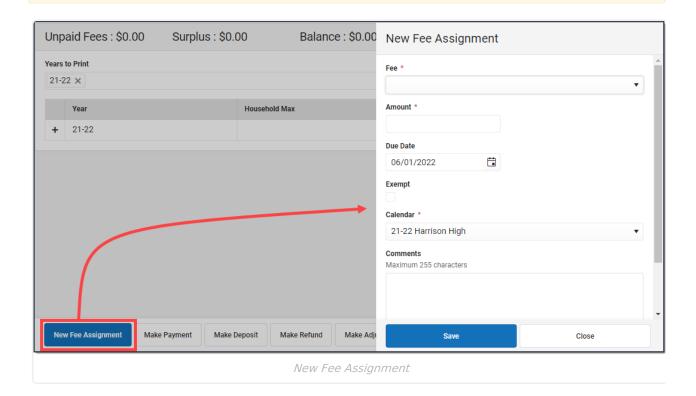
# **Assign and Edit Fees**

Assign a Fee | Edit a Fee Assignment



For a fee to appear in the Fees Editor, it must first be assigned to the person, either individually or *en masse* using the <u>Fee Wizard</u> in the Fees section. Fees available for assignment depend on the options set by the school or district and are created in the Fees tool. Only fees that are marked as active can be assigned to students.

Once a fee is assigned to a person, it cannot be deleted, only voided.



#### **Assign a Fee**

- 1. Click the New Fee Assignment button. The New Fee Assignment panel displays.
- 2. Select a **Fee** from the dropdown list.

If the fee amount is predetermined, this value appears after the fee description. Otherwise the value will show as 0.00.

If the fee amount is variable, an asterisk (\*) appears after the amount.

3. If applicable, enter the **Amount** of the fee.

If the description of the fee ends in an asterisk (\*), the fee amount can be edited.

- 4. Enter a **Due Date** for the fee in *mmddyyyy* format. Clicking the date field opens a calendar of the current month which defaults to the current date.
- 5. If the person is exempt from paying this fee, mark the **Exempt** checkbox.



6. Select the **Calendar** to which the fee should be assigned.

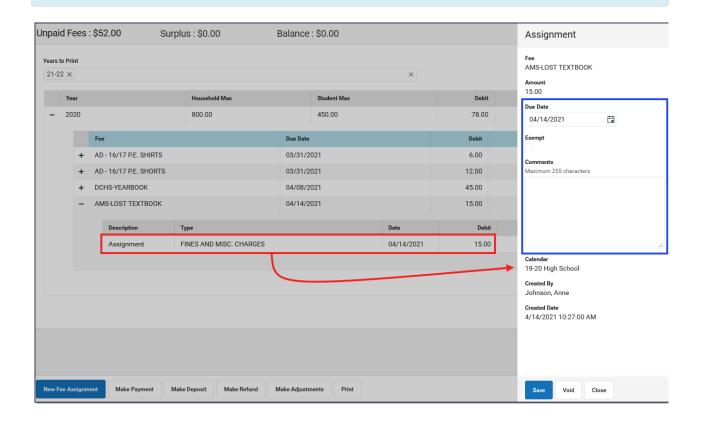
The enrollment record from the school/calendar selected in the toolbar is selected by default.

- 7. Enter any comments related to the fee assignment in the **Comments** field.
- 8. Click the **Save** button. The new fee displays in the **Fee Editor** with the Unpaid Fees total adjusted appropriately.

#### **Edit a Fee Assignment**

Once a fee is assigned, click the Assignment line to display the Assignment panel. The Assignment panel displays the **Fee**, the **Amount** and the **Due Date**, the **Exempt** checkbox, any **Comments** attached to the fee, the calendar in which the fee was created and the name of the user(s) who created and modified the fee. To edit a Fee Assignment,

Only the **Due Date**, **Exempt**, and **Comments** fields can be modified in this panel. To change the amount of a fee, <u>make an adjustment</u>.

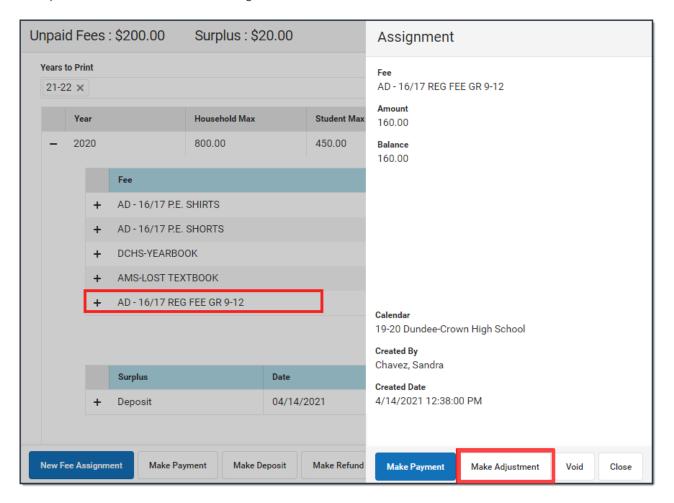


## **Adjust Fees**



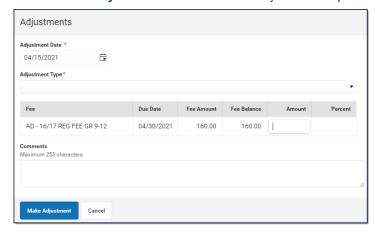
Make an Adjustment | Edit an Adjustment | Making Adjustments After an Online Payment is Made

Fee adjustments are used to modify the amount due for a fee. Fee adjustments may only be made for up to the amount of the fee assignment.



### Make an Adjustment

- 1. Select the Fee Assignment(s) for which the adjustment is being made. The Assignment panel displays.
- 2. Click Make Adjustment button. The Adjustments panel displays.



3. Enter an **Adjustment Date** in *mmddyyyy* format.



Click the date field to open a calendar of the current month which defaults to the current date.

- 4. If applicable, select the **Adjustment Type** such as Activity Cancelled, Cost Adjustment or Uncollectible.
- 5. Enter the amount to be removed from the fee(s) in the Adjustment Amount or % field.

The subtracted amount cannot exceed the amount of the fee assignment. Enter a dollar amount in the **Adjustment Amount** field OR a **Percentage** amount (do not enter the '%' sign, just numeric up to three decimal points, like 10 or 10.567).

- 6. Enter any **Comments** associated with the adjustment.
- 7. Click **Save** when finished. Upon saving, the entered adjustment displays below the fee to which it was applied with the date of the adjustment, the amount deducted in the Credit column.

#### **Edit an Adjustment**

Once an adjustment is made, clicking on the adjustment displays the **Adjustment** panel which includes the adjusted Fee, the **Adjustment Date**, the **Adjustment Type**, any **Comments** attached to the adjustment, the calendar in which the adjustment was made and the name of the user(s) who created and modified the adjustment.

Only the adjustment **Type** and **Comments** can be added or modified in this panel. Click **Save** when finished.

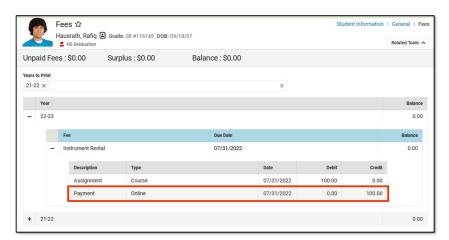
# Making Adjustments After an Online Payment is Made

Users have the option to void a payment made online using the Fees tool, or refund the payment amount using the <u>Payments Reporter</u> tool.

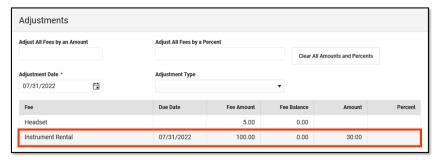
These options are also available when adjustments are made after a fee assignment was paid online. Below is an example.

1. A parent paid for a fee online for \$100.

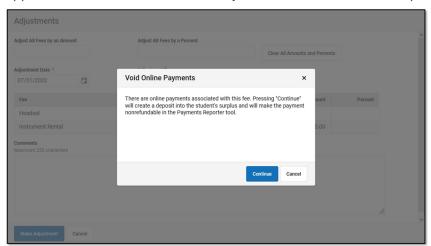




2. An adjustment for \$30 was made after the payment was made.

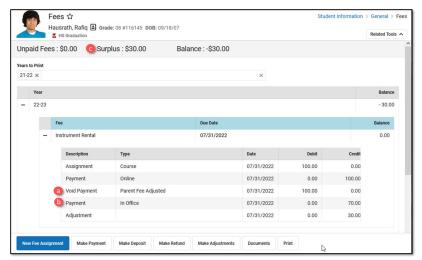


3. This message appears when the amount of the adjustment is refunded to the parent.



- 4. Clicking **Continue** does the following:
  - a. The payment amount of \$100 is voided and a deposit is made into the surplus.
  - b. A withdrawal of \$70 is made to pay for the new fee amount.
  - c. A surplus of \$30 remains. The online payment can **NOT** be refunded in the <u>Payments</u> <u>Reporter</u> tool.

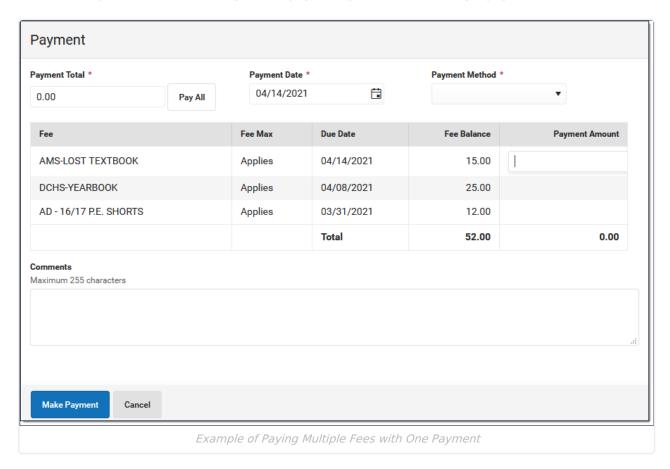




5. Clicking **Cancel** does not make the adjustment. The adjustment has to be made as a partial-return in <u>Payments Reporter</u>.

## **Pay Fees**

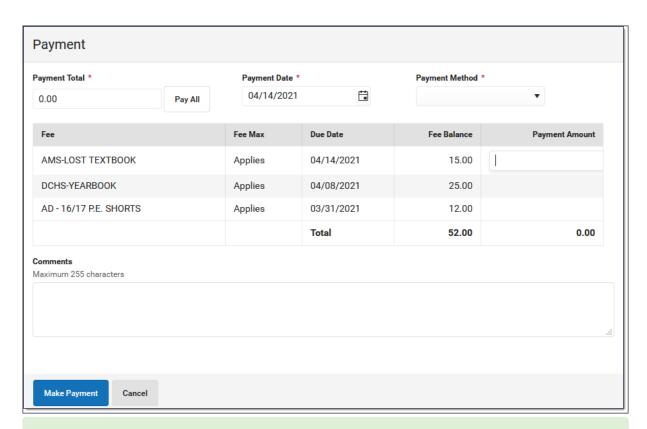
Fees can be paid one at a time or you can pay multiple fees with a single payment.



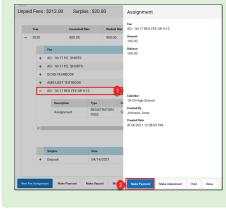
### **Make a Payment**



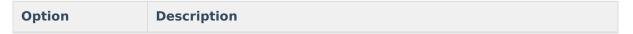
- 1. Click the **Make Payment** button at the bottom of the screen. The **Payment** panel displays all fees from all years for which a payment is needed.
  - ▶ Click here to expand...



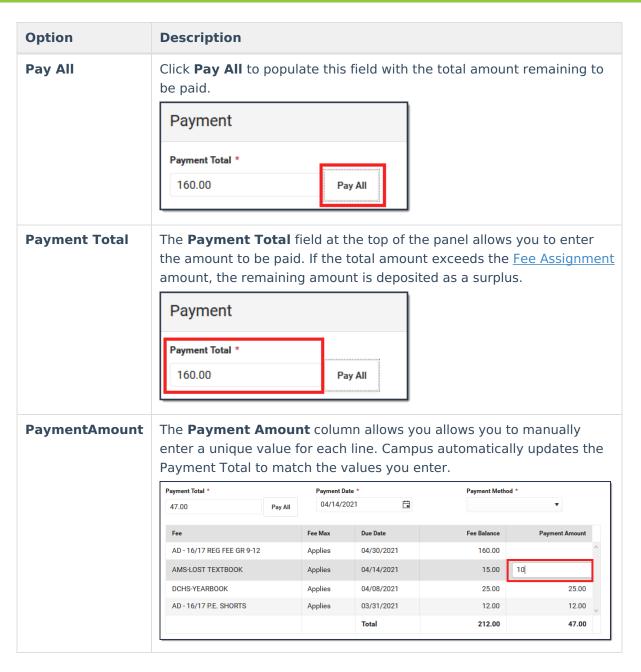
You can also access the Payment panel by clicking an individual fee then clicking the **Make Payment** button on the Assignment panel.



- 2. Enter a **Payment Date** in *mmddyyyy* format.
- 3. Enter the amount of the payment using one of the following options.



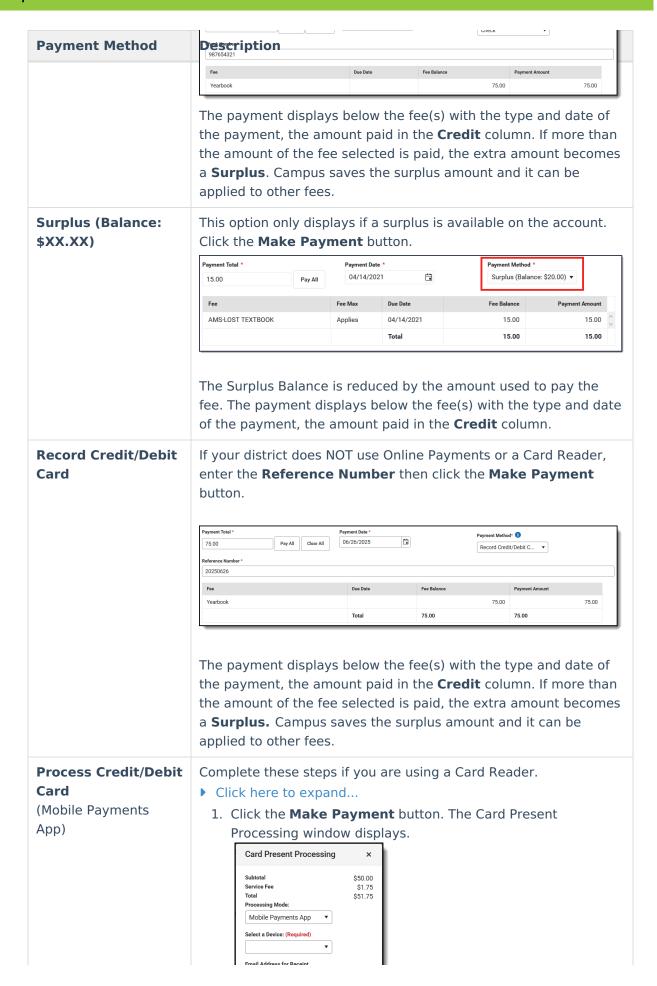




- 4. Enter any **Comments** associated with the payment.
- 5. Select one of the following **Payment Methods** and complete the payment.

Payment Method	Description
Cash	Click the <b>Make Payment</b> button. If more than the amount of the fee selected is paid, the extra amount becomes a <b>Surplus</b> . Campus saves the surplus amount and it can be applied to other fees.
Check	The Check # field displays when you select this option. Enter the Check # then click the Make Payment button.  Payment  Payment Total*  Payment Total*

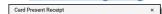




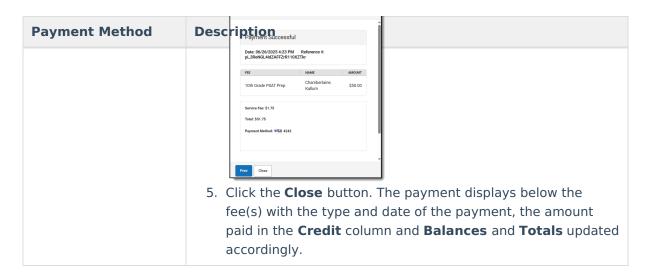


#### id email similar to "user@example.com **Payment Method Description** Cancel 2. Select Mobile Payments App in the **Processing Mode** field. 3. Select one of the mobile devices configured for Campus Payments from the **Select a Device** field. For details on setting up the mobile app to take payments, see Mobile Payments Setup for Office Payments. 4. Enter an Email Address if the cardholder would like a receipt. 5. Click **Send to app**. It will then appear as a Pending Transaction on that mobile device. You may need to tap Refresh for the transaction to appear. 6. Tap **Submit Payment**. 7. Use the card reader to either tap, swipe, or read the chip in the card. When payment is complete, a confirmation message displays on the app. In Campus, a card present receipt display. **Process Credit/Debit** Complete these steps if you do not have a Card Reader. Card (Manual Entry) Click here to expand... 1. Click the Make Payment button. The Card Present Processing window displays. **Card Present Processing** Service Fee \$1.75 Total \$51.75 Processing Mode: Manual Entry All fields below are required. Card number 1234 1234 1234 1234 Security code Submit Payment Cancel

- 2. Select Manual Entry in the **Processing Mode** dropdown list.
- 3. Fill out the following fields.
  - Card Number
  - Card Expiration
  - Security Code
  - Full Name
  - Country or region
  - Address
  - Email Address for Receipt
- 4. Click the **Submit Payment** button. If the transaction is successful, the receipt displays and you can print the receipt from your browser. A receipt is emailed if an email address was entered in the Email field. This email is not included in the <u>Sent Message Log</u>.







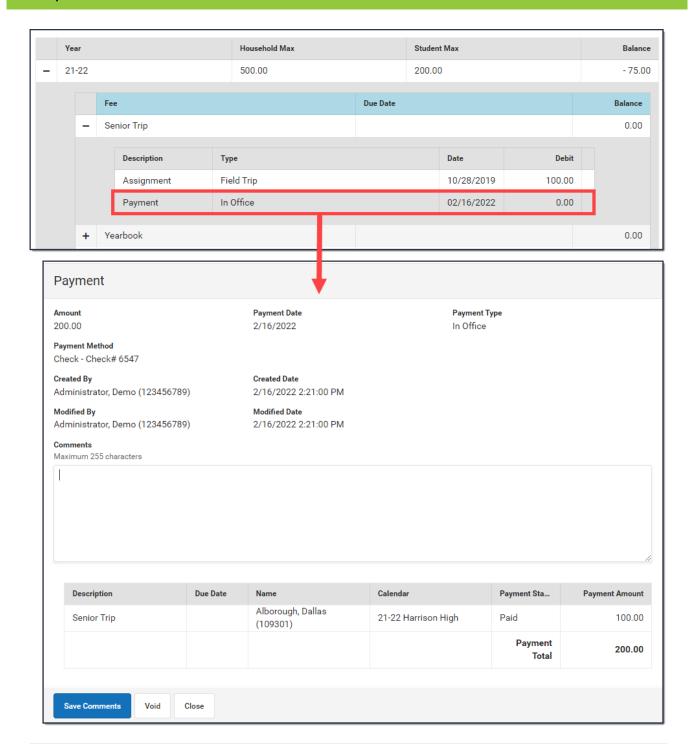
#### **Payment Panel**

Only **Comments** can be added or modified in this panel.

After a payment is made, you can click the payment to display the Payment panel. This panel includes the **Payment Date**, the total **Amount**, the **Payment Method**, and any **Comments** attached to the payment. The calendar in which the payment was made and the name of the user(s) who created the payment also display.

Below the **Comments** section, the panel displays all fees paid with that payment, the due dates of each fee, and the amount paid for each fee.





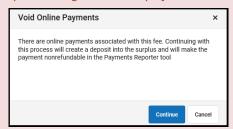
# Void a Fee Assignment, Payment, or Adjustment

Transactions may NOT be deleted. Instead, they are voided which reverses the transaction. The procedures in this article describe voiding Fee Payments and Adjustments that were entered using the Fees tool in Campus.

**Important Information About this Process** 



- Deposits cannot be voided, only refunded.
- Voiding a Fee Assignment also voids all Payments and Adjustments attached to the assignment.
- If a payment transaction originally included surplus funds which were then reallocated to another fee, the original payment cannot be voided. Later payments made with the surplus funds must first be voided before the original payment can be voided.
- When voiding a fee that was paid using an online payment, this message appears:



Clicking **Continue** voids the payment and deposits the amount of the online payment into the surplus, and the payment can **NOT** be refunded in the <u>Payments Reporter</u> tool.

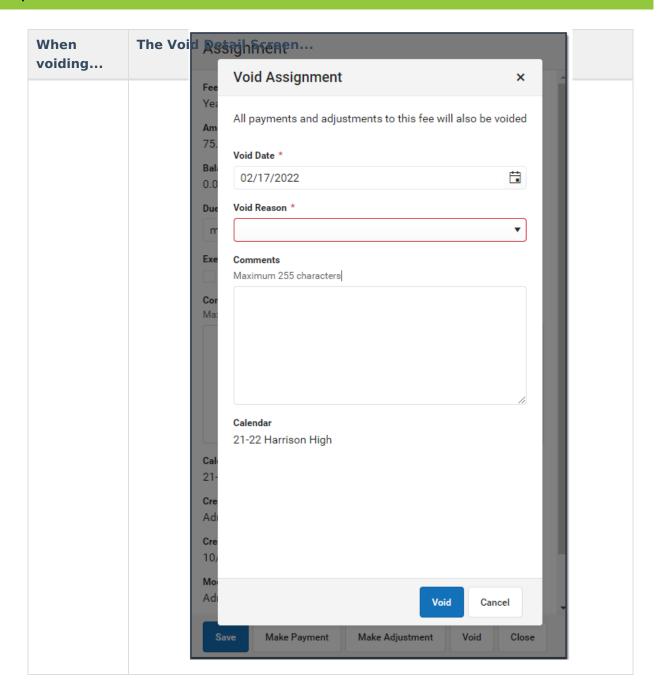
Clicking **Cancel** does **NOT** void the online payment through the Fees tool. Instead, you can use the <u>Payments Reporter</u> to refund the payment.

## Void an Assignment, Payment, Or Adjustment

1. Select the Assignment, Adjustment or Payment and click the **Void** button. A **Void Detail** screen displays.

When voiding	The Void Detail Screen
an Assignment	includes the Fee assigned, the Amount, the Due Date and any Fee Comments. Expand the area below to see an example of this screen.  Click here to expand

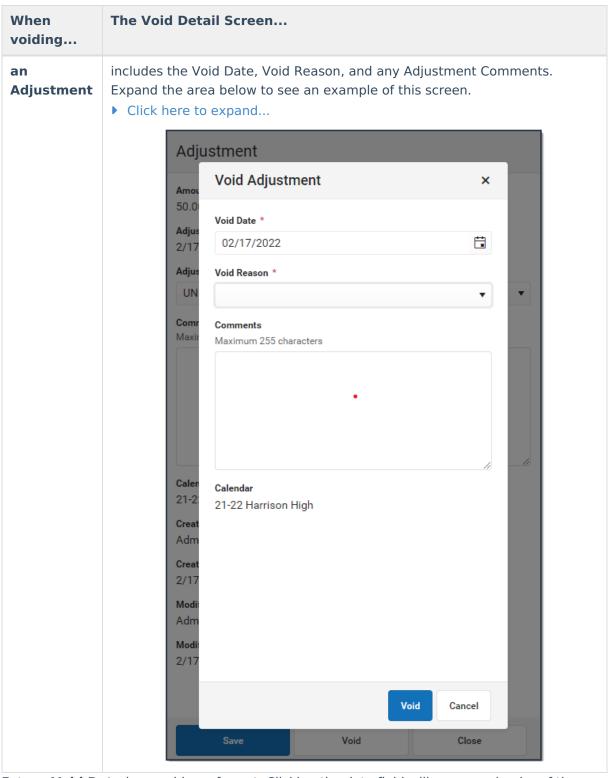






#### When The Void Detail Screen... voiding... a Payment includes the Payment Date, the Amount paid, the Payment Method and any Fee Payment Comments. A table detailing the payment transaction appears following the summary information which includes the Fee, the Due Date, the Amount owed and the Payment Amount, as well as any deposits made as a result of the payment. When voiding a Payment, indicate the **Payment Void Type**. • Void payment to this fee and create deposit voids the selected payment only and creates a surplus with the amount paid. Void payments to all fee assignments paid with this fee **payment** voids the selected payment and any other payments made in the same transaction. All payments made in the transaction payment are listed in the payment transaction table. Expand the area below to see an example of this screen. ▶ Click here to expand... **Payment** Payment Type In Office **Payment Date** 12.00 4/14/2021 Void Payment × Void Date \* Void Reason \* 04/15/2021 What to void: \* Void payment to this fee and create deposit. Void payments to all fee assignments paid with this fee payment (Cancels payment). Maximum 255 characters Cancel





- 2. Enter a **Void Date** in *mmddyyyy* format. Clicking the date field will open a calendar of the current month below. This field defaults to the current date.
- 3. Select a **Void Reason** from the dropdown list, such as Activity Cancelled, Office Mistake or Uncollectible.
- 4. Enter any **Comments** associated with the void transaction.
- 5. Click **Void** when finished. After a Payment or Adjustment is void, Campus adds a line to the editor to reverse the credit. When an Assignment is void, Campus adds a line to reverse the debit and labels the assignment as Void.

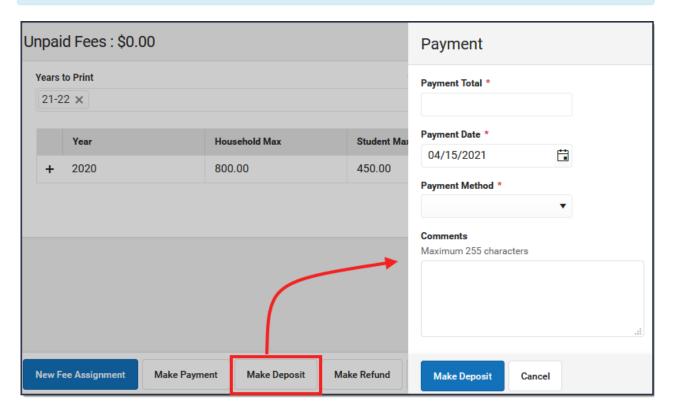




## Make a Deposit (Surplus)

Deposits create a **surplus** that can be applied to future fee assignments.

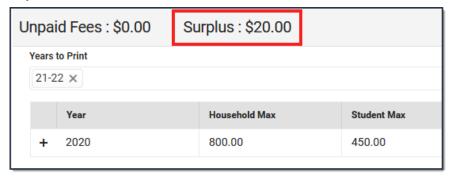
If *Autopay Fees with Surplus Balance* set to Yes in <u>System Preferences</u>, the surplus created by the deposit is **automatically** applied to any outstanding fees for that student.



- 1. Click the **Make Deposit** button. The Payment panel displays.
- 2. Enter the amount of the deposit in the **Payment Total** field.
- 3. Enter the **Payment Date** in *mmddyyyy* format.
- 4. Select a **Payment Method** from the dropdown list.
  - Cash
  - Check enter a Check #
  - Record Credit/Debit Card enter a Reference #
- 5. Enter any **Comments** associated with the deposit.
- 6. Click Make Deposit. The Surplus amount is updated and can be applied to an unpaid fee at



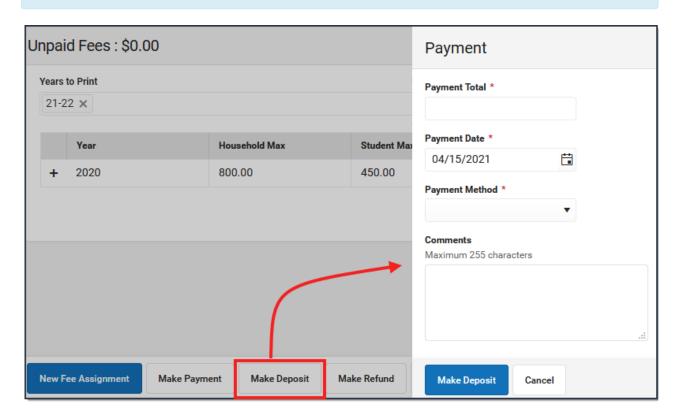
any time.



## **Make Refund from Surplus Amount**

Deposits create a **surplus** that can be applied to future fee assignments.

If *Autopay Fees with Surplus Balance* is set to Yes in <u>System Preferences</u>, the surplus created by the deposit is automatically applied to any outstanding fees for that student.



- 1. Click the **Make Deposit** button. The Payment panel displays.
- 2. Enter the amount of the deposit in the **Payment Total** field.
- 3. Enter the **Payment Date** in *mmddyyyy* format.
- 4. Select a **Payment Method** from the dropdown list.
  - Cash
  - Check enter a Check #
  - Record Credit/Debit Card enter a Reference #
- 5. Enter any **Comments** associated with the deposit.



6. Click **Make Deposit**. The Surplus amount is updated and can be applied to an unpaid fee at any time.

