

Synergy SIS[™] Fees – Standard Mode - Administrator and User Guide



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TABLE OF CONTENTS

CHAPTER ONE: OVERVIEW & SETTING UP FEES	7
Overview of Fees Defining Lookup Tables Setting up the Fee Category table	
Configuring District Fee Options Disable fee check during No Show process	
Setting the District Fee Total Type	14
Selecting the District Fee Model	15
Configuring Payment Services Enabling online payments systems	
Enabling fee payment through ParentVUE/StudentVUE	17
Defining School Fees Entering School Fee Codes	
Setting up Optional Fees Entering optional School Fee Codes	
CHAPTER TWO: ASSIGNING FEES	23
Assigning Fees en Mass Mass assigning a fee	24 24
Assigning Fees to an Individual Assigning a fee to a student	
CHAPTER THREE: ENTERING FEE PAYMENTS	
Entering Payments Recording a payment to an individual fee	
Recording a general payment	33
CHAPTER FOUR: VIEWING FEE & PAYMENT HISTORIES	
Viewing Fee History Accessing the fee history	
Viewing Fee System Transactions Accessing the fee system history	
CHAPTER FIVE: RUNNING REPORTS	
To Access Reports	37
FEE201 – Student Fee Profile	

FEE401 – Student Fee List	
FEE402 – Student Fee Collection List	42
CHAPTER SIX: SETTING SECURITY	
School Fee Codes Security	45
Student Fees Security	46
Fees Reports Security	46
INDEX	47

ABOUT THIS MANUAL

Edupoint Educational Systems develops software with multiple release dates for the software and related documentation. The documentation is being released in multiple volumes to meet this commitment.

The table below lists the release date, software version, documentation volume number, and the content included in each volume of documentation to date.

Software and Document History

Date	Volume	Edition	Revision	Content
September 2013	1	1	0	Initial release of documentation. The original Fees guide was broken into two separate guides for each mode.

CONVENTIONS USED IN THIS MANUAL

Bold Text	Bold Text - Indicates a button or menu or other text on the screen to click, or text to type.
	Tip – Suggests advanced techniques or alternative ways of approaching the subject.
	Note – Provides additional information or expands on the topic at hand.
	Reference – Refers to another source of information, such as another manual or website
CAUTION	Caution – Warns of potential problems. Take special care when reading these sections.

BEFORE YOU BEGIN

Before installing any of the Edupoint family of software products, please be sure to rescreen the system requirements and make sure the district's computer hardware and software meet the minimum requirements. If there are any questions about the system requirements, please contact an Edupoint representative at (877) 899-9111.



Caution: The Edupoint family of software does not support the use of pop-up blockers or third-party toolbars in the browser used to access Synergy SIS. Please disable any pop-up blockers (also known as pop-up ad blockers) and extra toolbars in the browser before logging into any Edupoint product.

At any point, if there are any technical difficulties, please contact the Edupoint technical support team at support@edupoint.com or by phone at 1-877-899-9111 option 1.

Chapter One: OVERVIEW & SETTING UP FEES

In this chapter, the following topics are covered:

- Overview of Fees
- Defining Lookup Tables
- Configuring District Fee Options
- Configuring Payment Services
- Defining School Fees
- Setting up Optional Fees

OVERVIEW OF FEES

This guide describes how to setup and configure the Fees screens, where student fees and payments for items such as library fines and lab materials can be tracked. It also shows the security options available. It illustrates how to enter and modify fee information, synchronize fees, and print related reports.

Synergy SIS can track fees charged to student for a variety of activities, as well as the payments made. There are two methods by which fees can be tracked: Standard and Direct Payment. The Standard fee mode has basic fee recording capabilities. The Direct Payment fee mode offers expanded functionality including fee waivers, proration, quick payment options, and mass assigning fees based on grade, gender, or course.

This guide covers the Standard fee mode.

Feature	Standard fee mode	Direct Payment fee mode
Basic Features		
Add Fees	Yes	Yes
Update Fees	Yes	Yes
Delete Fees	Yes	Yes
School Fees Code Setup	Yes	Yes
Mass Assign Fees	Yes	Yes
Group Fees	Yes	Yes
Advanced Features		
Fee Proration	No	Yes
Fee Waivers	No	Yes
Fee Refunds	No	Yes
School Course Fees	No	Yes
Enrollment Fees	No	Yes
Family Fee Caps	No	Yes
District Fee Code Setup	No	Yes

District Course Fees	No	Yes
Fee Deposit	No	Yes
Payments		
Payments in Synergy	Yes	Yes
Quick Payment in Synergy	No	Yes
Payment History	No	Yes
ParentVUE Payments		
Payschool Payment	Yes	Yes
Evalon Payment	Yes	Yes
UMB-ACH (e-check) Payment	No	Yes
SchoolPay Payment	Yes	Yes
ParentVUE shopping cart	No	Yes
Synchronization		
Course Fee Sync	No (uses Mass Assign)	Yes
Program Waiver Sync	No	Yes
Enrollment Fee Sync	No	Yes
Family Fee Cap Sync	No	Yes
Reports – Individual		
Student Fee Profile	Yes	Yes
Student Fee Receipt	No	Yes
Reports – List		
Student Fee List	Yes	Yes
Student Fee Collection List	No	Yes
Student Fee Refund List	No	Yes
Fee Code Detail by Payment Method	No	Yes

Fee by Class	No	Yes
Fees Collected Detail	No	Yes
Course Fee Collected Detail	No	Yes
Student Fee Aging List	No	Yes
Student Fees Daily Deposit		
Course Fees Totals List	No	Yes
Student Fees Refund Paid List	No	Yes
Reports – List		
Fees Collected Summary	No	Yes
Fee Code by Payment Method	No	Yes

Your district should select one fee model for all your schools. It is not possible to switch from one mode to the other without the possibility of losing historical data.

After selecting the District's fee mode, a list of the fees and associated activities will be needed. Fees can also be categorized for reporting and tracking. A standard list of these categories should be developed by your district as well.

DEFINING LOOKUP TABLES

The Fee Category table must be setup in Synergy SIS before you configure the rest of the fees options.

Setting up the Fee Category table

These categories should describe the area in which the fee or payment is incurred. They can be high-level categories, such as Enrollment based fees. Individual fees such as a locker fee or a laptop deposit fee fall under these categories. Examples of high-level categories include, Enrollment based fees, District related fees, School related fees, Course related fees, Activity based fees, and Optional fees.

Fee categories also can be more specific, such as Lab, Textbook, Lockers, Library, Sports, or Field trips. Whether you use high level or individual fee categories, a Payment category should be included on the list. The payment category should have a ListOrder of "1", so that it appears at the top of the list.

- 1. Navigate to **Synergy SIS > System > Setup > Lookup Table Definition** icon. The Lookup Table Definition screen displays.
- 2. On the Lookup Table Definition screen, navigate to **K12.FeeInfo > Fee Category**. The Fee Category lookup table displays.

Menu 🕶 🍏 Save Undo											Status: Ready	2 41
VLookup Table De	fini	tior	n									~
Lookup Table Maintenance												(
 K12 K12 Accommodation K12 Accommodation.Setup 	Nam	e: Fe se C	ee (Category Na e as the State	amespace: K12.Fe Code - all valu	eeInfo Locked: N es reported to state will be used from the Ic	okup code and	not evaluate to the	e State Code uni	ess the State Code	e is non-blank for	a given value
K12.AddressInfo	Loo	kup 1	Val	ues								Add 🕥
K12.AttendanceInfo	×	Line		ListOrder △	Code 🛆	Description 🛆	Other SIS	State Code	Alt Code 3	Alt Code SIE	Stat	us
P K12 AZ SAIS	\sim				0000 4	Description		State Code 🗢	All Code 5		Year Start 🄶	Year End 🤤
K12 CA CAL PADS			1		PAY	Payment					~	~
K12.CA.CBEDS			2 2		ACT	Activity Based Fees					~	~
K12.CareerPlan		3	3		CRS	Course Related Fees					~	~
K12.Census			4		ENR	Enrollment Based Fees					~	~
K12.CourseHistoryInfo			5		OPT	Optional Fees					*	~
K12.CourseInfo		6	6		SCH	School Related Fees					~	~

Figure 1.1 – Fee Category Lookup Table

- 3. Click Add. A new row is added to the Lookup Values grid.
- 4. Enter the appropriate values in the new row.
 - ListOrder sets the order in which the values are displayed. If the numbers in the ListOrder field are the same or are blank, the Code is used to sort the list and then the Description.
 - **Code** the abbreviated Fee Category. This value must be unique since it is used internally to link the tables in the database and it displays in the drop-down list.
 - **Description** the name of the Fee Category.
 - Other SIS used to import data during the conversion process from another student records system. This field is optional. Enter any code used in the old system in this column.

- The State Code, Alt Code 3, and Alt Code SIF are not used in this table. The checkbox at the top of the table Use Code as the State Code is not used either.
- If appropriate, a start date and end date may be entered for the code in the **Status** column to activate or deactivate the code for a particular year. If a code is inactive, it shows in data already entered but it is not available for selection for new records. For example, if a code is no longer valid for records beginning FY2011, select 2011 for the end year.
- 5. Click Save.



CONFIGURING DISTRICT FEE OPTIONS

The following items should be configured at the district level.

- Disable fee check during No Show process
- District Fee Total Type
- District Fee Model

Disable fee check during No Show process

When a student does not attend school (a no show"), they are withdrawn using the No Show process. By default, the system requires the student pay any outstanding fees before allowing the No Show process to finalize. This setting can be overridden, allowing students to be withdrawn using the No Show process even if they have unpaid fees.

1. Navigate to Synergy SIS > System > Setup > District Setup. The District Setup screen displays.

Menu V Save Undo	Status: Ready 😂 🖓 🦛
♥District Setup	» 🗸
District Setup	
Options System Grade Setup TeacherVUE Labels Auto-Sequence Reports Waive	rs Mobile Apps
Enrollment Options	۵
New Student Add Type Permanent ID Update Type	Enrollment Date Validation
Synergy Genesis update of permanent ID	Must be within school calendar (including weekends and holidays as valid da 💌
Allow "No Show" Disable "No Show" Outstanding Fee Error	NOTE: All enrollment and attendance dates are validated at runtime by all reports and processes that require the school calendar. Changes to this field do not initiate a retroactive validation.
Require Summer Withdrawal Code/Date For "No Show"	Exit Programs/Services On Student Inactivation
Do Not Clear Summer Withdrawal Code and Date	Auto-Generate Needs Transactions
Show SASIxp Enrollment History	Suppress Needs With Expired Programs
Validate SASIxp Enrollment History	Default Needs Exit Code
Show Emergency Contact as Lookup	<u> </u>
Show User Code As Lookup	Default ELL Exit Code
Show User Num As Lookup	×
Show Advanced Options On Inactivate Student	Default SPED Exit Code
Delete Course Requests on No Show and Inactivate	

Figure 1.2 – District Setup Screen

- 2. Select the **System** tab.
- 3. Select the **Disable "No Show" Outstanding Fee Error** option.
- 4. Click Save.

Setting the District Fee Total Type

1. Navigate to Synergy SIS > System > Setup > District Setup. The District Setup screen displays.

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9	♥Dist	rict Se	etup										
D	istrict Set	up											
	Options	System	Grade Setup	TeacherVUE	Labels	Auto-Sequence	Report	s Waive	rs Mobile Apps				
I	Other Op	tions											
	Discipline	Туре		Incident V	iolation Dis	play		Distr	ict Group History	/ Filter			
	Incident	*		Entire Vio	olation	~							~
	Student N	lotification	<u>l</u>	Badge Nu	imber Upda	ate Type							
	lcon	*		Genesis	update of b	adge numb 🚩							
I	🗖 Disable	e Unique \$	State Number	Adult ID L	pdate Type	9							
I		Vegative S	Seat Totals			*							
I	V Enable	e Annound	ement Dismiss	al Fee Total	Туре								
I				Include fe	es for all o	rganizations ar	nd all ye	~					
I	C Enable	e historica	I tracking of sta	aff in sections									
I	🗖 Disable	e Section	Locking										
I	🗖 Auto A	ssign Dist	trict Staff To Sc	hools									
1	Validate S	Student Cl	asses										
	Show Wa	rning and	Allow Data to t	be Saved if St	udent Class	ses Overlap	*						
1	Student P	Profile Rep	oort Release St	atement 🕎 🤇)								
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Figure 1.3 – District Setup Screen

- 2. Select the **System** tab and scroll to the **Other Options** group box.
- 3. In the **Fee Total Type** field, select how the fees are displayed and summarized. The options include:
 - Total fees for focus organization and focus year (school focused only)
 - Total fees for focus organization and all years (school focused only)
 - Total fees for all organizations and focus year (district focused only)
 - Total fees for all organizations and all years (district focused only)
- 4. Click Save.

Selecting the District Fee Model

- 1. Navigate to Synergy SIS > System > Setup > District Fee Options. The District Fee Options screen displays.
- 2. In the District Fee Model field, select Standard.



Figure 1.4 – District Fee Options Screen – District Fee Model field

3. Click Save.

CONFIGURING PAYMENT SERVICES

You can give parents and students the ability to view student fees on ParentVUE and StudentVUE. If you have are using a payment service provider, those fees can be paid directly through the ParentVUE and StudentVUE portals.

If your district partners with an online payment service provider, such as PaySchool, Elavon, ACH, or SchoolPay some basic setup must be done before using the payment services.

Enabling online payments systems

- 1. Navigate to Synergy SIS > System > Setup > District Fee Options. The District Fee Options screen displays.
- 2. Select the **Online Payments** tab and go to the **Fee System Setup** group box.

Menu 🕶	51 4	nre Undo					9	ana Realy @ Ro St.
Dis	trict Fe	e Options						(
Options	Online P	ayments Caps Deposits						
Fee Sys	tem Setup							
Enab	le Online P	ayments						
Enab	le Shopping	g Cart						
VEnab	le Partial P	ayments						
Online	Payment C	onfiguration						Add
× Liee			G Fee Payment () Fee System URL ()			G fee System Password	E Passed	nt Fee System Response URL (Optional)
	1	Elavon 🔀 Elavon	Credit/Debit C Mttps://test.internetsecure	90166			No	https://qa.edupoint.com
2	191	SchoolPay SchoolPay	Credit/Debit (🕑 https://www.mypaynetapp	672141343821530555783329984			No	https://ga.edupoint.com
. 3	121	PaySchools PaySchools	Online Paym V http://test.payschools.com	B8ACCA9B7F1E46A0A370568B4593F751	36954660175B4544A686702B69D97A6D		No	https://qa.edupoint.com/
		UMB ACH VIMB ACH	Chack Vittos //opumentanginarget	36			Ves	a second s

Figure 1.5 - District Fee Options screen - Online Payment tab

- 3. Select the Enable Online Payments option.
- 4. Select the **Enable Shopping Cart** option to allow parents to pay for more than one student's fees in a single online transaction.

- 5. Select the **Enable Partial Payments** option to allow parents or students to pay a portion of a fee over multiple payments via ParentVUE, rather than the total amount in one payment.
- 6. Click Add. A blank row displays in the Online Payment Configuration grid.
- 7. Fill in the fields in the Online Payment Configuration grid.
 - Enable Fee System check to enable the fee system.
 - Fee System Type selects which fee system provider to use from all available fee system.
 - Display Name the name of the fee system displayed to users.
 - Fee System Online Payment Method select if the fee system will accept cash, check, credit, or online payments.
 - Fee System URL the secure fee processing web address provided by the fee system provider.
 - Fee System ID the ID assigned to your district by the fee system provider.
 - Fee System Additional ID the additional ID assigned to your district by the fee system provider.

[-	
1		

Note: PaySchools requires two unique fields be passed when processing transactions. Each client receives a District ID, which is entered in the **Fee System ID** field, and a Category ID, which is entered in the **Fee System Additional ID** field.

- Fee System Password the password assigned by your district to use this fee system provider.
- Password is Set indicates if a password is set for this provider.
- Fee System Response URL (Optional) your district URL that will receive payment status updates from the fee system provider.
- 8. Click Save.

Enabling fee payment through ParentVUE/StudentVUE

1. Navigate to Synergy SIS > System > ParentVUE > ParentVUE and StudentVUE Configuration. The ParentVUE and StudentVUE Configuration screen displays.

Menu Via Save Undo Status: Ready 🖓 🖓 🖓									
	JE Configuration			~					
PVUE Configuration Activation Key Configuration	on Contact / Privacy Contact	Course Requests	s Email	Languages					
Parent Active Modules	Student Active Modules	<u></u>		- i					
Attendance	Attendance								
Course Request	Course Request			E					
Course Request Edit Option	Course Request Edit Option								
Editable	Editable								
Current Schedule	Current Schedule								
Discipline	Discipline								
Conference	Conference								
✓ Fees	Fees								
☑ Grade	Grade								
Gradebook	Gradebook								
Course History	Course History								
Health Visits	Health Visits								
Health Conditions	Health Conditions								
Health Immunizations	Health Immunizations								
School Information	School Information								
District Information	District Information								
Digital Locker	Digital Locker								
Streams	Streams								
Special Ed	C Special Ed								

Figure 1.6 – ParentVUE and StudentVUE Configuration screen

- 2. Select the Fee check boxes in the Parent and/or Student columns.
- 3. Click Save.

DEFINING SCHOOL FEES

Once you define the fee categories and configure the district fee options have been configured, you can set up the list of fees used by each school. Since the fees are setup at the school level, these steps need to be repeated at every school that charges fees.

Entering School Fee Codes

- 1. Navigate to Synergy SIS > Fees Standard > Setup > School Fee Codes. The School Fee Codes screen displays.
- 2. In the **Fee Total Type** field, select how the fees will be displayed and summarized. The options include:
- Scope of Fees to Include selects how the fees will be displayed and summarized. The options include:
 - Total fees for focus organization and focus year (school focused only)
 - Total fees for focus organization and all years (school focused only)
 - Total fees for all organizations and focus year (district focused only)
 - Total fees for all organizations and all years (district focused only)



Note: The School Fee Total Type does not override the Fee Total Type set at the district level. If the Fee Total Type is changed at any school, it only changes it at that particular school, not at the district level.

3. Click Add.

Menu 🗸 🖏 Save Undo Status: Ready 🗟 🖓 🖏								
75	Sch	ool Fe	e Codes				» 🛐	🔊 🔡
Scho	ol: H	ope High S	School FullYear: 2011-2012					
Fee	Code	es						
Fee Tota	Total I fees	Type for focus o	organization and focus					Í
Sch	ool F	ee Codes					Add	
×		Fee Code ⇔	Fee Description 😂	Fee Category 🖨	Fee Amount	General Ledger Account		Ş
	1	BDI	Band Instrument Rental	SPT 🔽	50.00			=
	2	BDL	Band Locker	SPT 🔽	10.00			
	3	BDU	Band Uniform	SPT 🔽	25.00			
	4	BUS	Sports Transportation	SPT 🔽	25.00			
	5	СВК	Course Required Text Book	CRS 🚩	15.00			
	6	CLB	Course Required Lab Fee	CRS 🗸	15.00			
		CLS	Club Shirts	ACT 💙	10.00			
	8	CLT	Club Travel Costs	ACT 🗸	10.00			
	9	CMP	Student Assigned Computer (netbook) Deposit	SCH 🔽	150.00			
	10	CSP	Course Required Supply Fee	CRS 👻	15.00			
	11	DBK	Damage Fine - Book	SCH 🗸	15.00			
	12	DCE	Damage Fine - Computer Equipment	SCH 🗸	150.00			
	13	DCR	Damage Fine - Classroom	SCH 🔽	45.00			
	14	DLK	Damage Fine - Locker	SCH 🗸	20.00			
	15	FTB	Field Trip - Band	SPT 🗸	10.00			

Figure 1.7 – School Fee Codes screen – Standard model

4. Enter the appropriate values in the new row.

- Fee Code the abbreviated School Fee Code. This value must be unique since it is used internally to link the tables in the database and it displays in the drop-down list.
- Fee Description the name of the School Fee Code.
- Fee Category the fee group that this school fee should fall under. The fee category is set in the Fee Category Lookup table.
- Fee Amount the standard price for this fee. This amount can be edited after it is assigned to a student or course.
- **General Ledger Account** indicates if this fee should be associated with a specific general ledger account in an accounting system.
- 5. Click Save.



SETTING UP OPTIONAL FEES

School can have some of their optional fees available on ParentVUE and StudentVUE. Optional fees would include such items as yearbooks, varsity athlete jackets, prom or dance tickets, and parking passes. Parents and students can pay the optional fees or purchase the items through the ParentVUE and StudentVUE portals.

Calendar	No Phato	ly	1 /0 /0 555 /0/01				FEE
Attendance	Con file Hope	e Hign Schoo		summary			
Class Schedule	Balance that	at you owe: !		Pay Fees			
Conference	Date	Course					
Course History	11/15/2011	СВК	Book Damages		\$5.00	Payment	
Course Request	01/12/2012	СВК	Lost Book: Algebra II	\$45.00		Textbook	
Discipline Fee	03/01/2012	СВК	Book Damage: Invisible Man - spilled drink	\$15.00		Textbook	
Grade Book	03/08/2012	СВК	torn	\$5.00		Textbook	
Health	03/08/2012	СВК	Damage			Textbook	
Report Card	03/30/2012	LAB	Lab Materials	\$12.00		Textbook	AG31 - Animal Sci
School Information	03/30/2012	LAB	Lab Materials	\$35.00		Textbook	EN46 - Prin Eng III
Student Info	05/01/2012	BUS	Fieldtrip Transportation	\$10.00		(BUS)	
Custom Tab	05/04/2012	BDI	Band Instrument Rental	\$50.00		Sports	
	05/04/2012	BDU	Band Uniform	\$25.00		Sports	
	05/04/2012	BDL	Band Locker	\$10.00		Sports	
	05/09/2012	BUS	Sports Transportation	\$25.00		Sports	
	05/09/2012	LAB	test	\$500.00		(BUS)	
			Totals:	\$732.00	\$5.00		Pay Fees
				44	2		

Figure 1.9 – ParentVUE Fees – Standard model

Entering optional School Fee Codes

- Navigate to Synergy SIS > System > ParentVUE > ParentVUE and StudentVUE School Configuration. The ParentVUE and StudentVUE School Configuration screen displays.
- 2. Select the **Options** tab and go to the **School Optional Fees** group box.

Menu V Save Undo Add Delete Status: Ready	2 🖓 😡						
School Name: Hope High School School Year: 2011-2012							
PVUE Configuration Course Requests Options							
Display Options	٥						
Select the staff who will receive emails for demographic updates (will be shown in ParentVUE)							
Staff 🗲 E-Mail							
School Optional Fees							
X Line Fee Code Fee Description ⇔ Amount ⇔ Max Units ⇔ Frequency	₽						
BUS Football Transportation \$25.00 Unlimited purchasing	~						

Figure 1.10 – ParentVUE and StudentVUE School Configuration

3. Click Chooser. The Fees Chooser screen displays.

Find Select										
Choose	Chooser									
Find Criteri	a									
Fee Code	Fee Description									
	Add Selected Row(s) > Add All Row(s) >>									
Soarch Dor										
Find Doubt			old	atod Itoms						
Find Result	a 🛛 🤟 🧐		×		Eee Description					
Line Code	Fee Description				Vearbook					
1 BDI	Band Instrument Rental			TUO	Tisket					
2 BDL	Band Locker			2 THC	licket - Homecoming					
3 BDU	Band Uniform			3 TGD	Ticket - Graduation					
4 BUS	Sports Transportation			4 TPR	Ticket - Prom					
5 CBK	Course Required Text Book			5 TSP	Ticket - Sports Event					
6 CLB	Course Required Lab Fee			6 FTB	Field Trip - Band					
7 CMP	Student Assigned Computer (netbook) Deposit			7 <mark>FTG</mark>	Field Trip - Senior Graduation					
8 CSP	Course Required Supply Fee			8 FTS	Field Trip - Sports					
9 DBK	Damage Fine - Book			9 CLS	Club Shirts					
10 DCE	Damage Fine - Computer Equipment			10 CLT	Club Travel Costs					
11 DCR	Damage Fine - Classroom			11 PKP	Parking Pass					
12 DLK	Damage Fine - Locker	<u> </u>		T I I I	r unking r uss					

Figure 1.11 – Fees Chooser screen

- 4. Find and select the appropriate optional fee types for your school.
- 5. Click Select. The optional fees display on the School Optional Fees grid on the ParentVUE and StudentVUE School Configuration screen.

Men	tenu▼ 🟐 Save Undo Add Delete Status: Ready 🗟 🖓 👧 2									
Y	Paren	tVU	E and Student	VUE Sch	ool Confi	guration	» 🛐 💰 🔣			
Scho	ool Name:	Hope	High School School Yea	ar: 2011-2012						
PV	PVUE Configuration Course Requests Options									
Dis	play Optio	ons					٨			
Sel Stat	Select the staff who will receive emails for demographic updates (will be shown in ParentVUE) Staff & E-Mail									
Sch	School Optional Fees Chooser									
×	Line F	ee ode ⊜	Fee Description 👙	Amount 🖨	Max Units 🖨	Frequency				
	1 CLS	6≑	Club Shirts	10.00	2	Unlimited purchasing	*			
	2 CLT	÷	Club Travel Costs	10.00	1	Unlimited purchasing	*			
	3 FTE	3←	Field Trip - Band	10.00						
	4 FT	≎€	Field Trip - Course	10.00		Unlimited purchasing				
	5 FT	G∉	Field Trip - Senior Graduation	10.00		Purchase can be made once a school year				
	6 FT	8€	Field Trip - Sports	10.00		Unlimited purchasing	*			
	7 PKF	•	Parking Pass	25.00		Unlimited purchasing	*			
	8 <mark>SLJ</mark>	÷	Sports Letterman Jacket	45.00		Unlimited purchasing	~			
	9 <mark>SLI</mark>	+	Sports Letterman Letter	10.00		Unlimited purchasing	*			
	10 TG	D€	Ticket - Graduation	10.00		Unlimited purchasing	~			
	11 THO	€	Ticket - Homecoming	100.00		Unlimited purchasing	~			
	12 TPF	₹	Ticket - Prom	100.00		Unlimited purchasing	~			
	13 TS	•	Ticket - Sports Event	10.00		Unlimited purchasing	*			
	14 YB	(+	Yearbook	25.00		Unlimited purchasing	~			

Figure 1.12 – School Course Fees tab - School Course screen

6. Edit the School Optional Fees information as necessary.

- **Fee Code** the abbreviated School Fee Code. This value is set on the <u>School</u> <u>Fee Codes</u> screen.
- Fee Description the name of the School Fee Code.
- **Amount** the standard price for this fee. This amount can be edited here.
- **Max Units** the maximum number of times this item can be purchased. For example, if each family can only purchase six extra graduation tickets, the Max Unit should be six. If no Max Unit is designated, there is no limit.
- **Frequency** the number of times throughout the year that the item can be purchased. The options are Unlimited purchasing or Purchase can be made once a school year. For example, you may want to limit each family to one parking pass a year, but each family can buy tickets to sports events (football games, basketball games, etc.) throughout the year.
- 7. Click Save.

Chapter Two: Assigning Fees

In this chapter, the following topics are covered:

- Assigning Fees en Mass
- Assigning Fees to an Individual

Assigning Fees en Mass

The Mass assign fees function enables you to assign fees to a specific group of students based on a course, gender, grade, or select individual students.

Mass assigning a fee

Note: This process only runs while focused at an individual school. It does not run when focused on the district level. Only school-based fees are available for mass assignment.

1. Navigate to Synergy SIS > Fees - Standard > Mass Assign Fees. The Mass Assign Fees screen displays.

Menu 🔻				Status: Ready 🕺 🖓
♥Mass Assign Fees				
Mass Assign				
Action Transaction Assign Fees 09/25/2013	Date Mass Assign Fees			
Process Validation		0	Student School Processing) (Q
Mass Assign Input Validation Rules			Apply fees changes to s	tudents in their home school
Transaction Date / Fee Code / Mass Assi	gn Indicator (Default)		Apply fees changes to s	tudents in concurrent schools
Note MS				
1. Salast Ess Cadas	Coloct the fee codes that will b	o applied to	the colocted students	
1. Select ree Codes	Select the lee codes that will b	e applieu lu	The selected students.	
Eas Codes				Chooser
X Line Fee Code	Description	Fee Ca	ategory	Fees
2. Student Selection Criteria	Schools must have the selecte	ed fee code.	10 have the feat and a second	d to the one
	Students that meet the selection	on criteria w	III nave the ree codes applie	d to them.
	in no selection chiena is provid	ieu, ille iee	codes changes will be applied	eu to an the students.
Select Students By				۵
Gender	Grade			
	09 10 11 12			
Courses				Chooser 🔕
X Line Course ID	Cours	e Title		
Students				Chooser
	Student Name		Grade	Gender

Figure 2.1 – Mass Assign Fees screen

- 2. In the Action field, select either to assign or un-assign fees.
- 3. Set the Transaction Date. This is the date the system assigns these fees.
- 4. In the **Mass Assign Input Validation Rules** field, select how the system should validate the mass assign fees. This helps prevent the duplication of fees entered manually. Options include:

- **Transaction Date / Fee Code / Mass Assign Indicator** this is the default validation rule. It checks to see if there is another mass assigned fee on the same date, with the same fee code. If there is, the system does not assign the new fee.
- **Transaction Date / Fee Code** The system checks to see if there is another fee (either manually entered or mass assigned) entered on the same date with the same fee code. If there is, the system does not assign the new fee.
- Fee Code They system checks to see if there is another fee (either manually entered or mass assigned) entered with the same fee code, regardless of date. If there is, the system does not assign the new fee.
- 5. Enter a **Note** to record any details or instructions related to this particular fee.
- 6. In the **Student School Processing** area, select if the changes apply to student in their home school and/or in their concurrent school.
- 7. Click **Chooser**. The **Chooser** screen displays.

Find	elect									
Choos	er									
Find Criteri	a							0		
Fee Code	Fee Description			Fee	Category					
	×									
	A	dd Selected Row(s) >	A	dd All	Row(s) >>					
Search Res	sults									
Find Resul	t	٥		Sel	ected Items	X	(<u>^</u>		
Line Fee	Fee Description	Fee		×	Line Fee Code	Fee Description	Fee Category			
1 BUS	Sports Transportation	SPT			1 BDI	Band Instrument Rental	SPT			
2 CBK	Course Required Text Book	CRS			2 BDL	Band Locker	SPT			
3 CLB	Course Required Lab Fee	CRS			3 BDU	Band Uniform	SPT			
			10	_				12		

Figure 2.2 – School Fee Chooser screen

- 8. Find and select the appropriate fees to mass assign.
- 9. Click **Select**. The optional fees display on the **Fee Codes** grid on the **Mass Assign Fees** screen.

			Status: Ready 🖓 🖓
✓Mass Assign Fees			
Mass Assign			
Action Transaction Date Assign Fees 09/25/2013	Mass Assign Fees		
Process Validation	G	Student School Proces	ssing
Mass Assign Input Validation Rules		Apply fees changes	to students in their home school
Transaction Date / Fee Code / Mass Assign Indi	cator (Default)	Apply fees changes	to students in concurrent schools
Note 🌆 🔿			
1. Select Fee Codes	Select the fee codes that will be applied to	o the selected students.	
Fee Codes	(Foo	Catagon	Chooser (
Fee Codes Line Fee Code Description BDL Band Instrument F	Fee Pental SPT	Category	Chooser (Fees
Fee Codes Line Fee Code Description 18D1 Band Instrument F 28DL Band Locker	Fee Rental SPT SPT	Category	Chooser (Fees \$50.00 \$10.00
Fee Codes X Line Fee Code BDI Band Instrument F 2 BDL Band Locker 3 BDU Band Uniform	Rental SPT SPT SPT SPT	Category	Chooser (Fees \$50.00 \$10.00 \$25.00
Fee Codes X Line Fee Code Description 1 BDI Band Instrument F 2 BDL Band Locker 3 BDU Band Uniform 2. Student Selection Criteria 3	Rental Free Rental SPT SPT Schools must have the selected fee code Students that meet the selection criteria v f no selection criteria is provided, the fee	Category Cat	Chooser (Fees \$50.00 \$10.00 \$25.00 pplied to them. applied to all the students.
Fee Codes X Line Fee Code Description 1 BDI Band Instrument F 2 BDL Band Locker 3 BDU Band Uniform 2. Student Selection Criteria 3 Select Students By Select Students By	Rental Fee Rental SPT SPT Schools must have the selected fee code Students that meet the selection criteria v f no selection criteria is provided, the fee	Category Cat	Chooser (Fees \$50.00 \$10.00 \$25.00 pplied to them. applied to all the students.
Fee Codes X Line Fee Code Description Image: Description Band Instrument F Image: Description Band Locker Image: Description Band Uniform 2. Student Selection Criteria Band Uniform Image: Description Band Uniform Select Students By Band Uniform Image: Description Image: Description	Fee Rental SPT SPT SPT Schools must have the selected fee code Students that meet the selection criteria with the selection criteria withe s	Category	Chooser (Fees \$50.00 \$10.00 \$25.00 pplied to them. applied to all the students.
Fee Codes X Line Fee Code Description Image: BDL Band Instrument F Image: BDL Band Locker Image: BDL Band Locker Image: BDL Band Locker Image: BDL Band Uniform 2. Student Selection Criteria Image: BDL Select Students By Image: BDL Gender Image: BDL Courses Image: BDL	Fee Rental SPT SPT SPT Schools must have the selected fee code Students that meet the selection criteria with the selection criteria withe s	Category	Chooser (Fees \$50.00 \$10.00 \$25.00 pplied to them. applied to all the students.
Fee Codes X Line Fee Code Description 1 BDI Band Instrument F 2 BDL Band Locker 3 BDU Band Uniform 2. Student Selection Criteria Select Students By Gender Select Students By Courses Support Selection	Fee Rental SPT SPT Schools must have the selected fee code Students that meet the selection criteria v f no selection criteria is provided, the fee Grade ↔ 09 10 11 12 Course Title	Category Cat	Chooser (Fees \$50.00 \$10.00 \$25.00 pplied to them. applied to all the students.
Fee Codes X Line Fee Code BDI Band Instrument F BDI Band Locker BDU Band Uniform 2. Student Selection Criteria Select Students By Gender V Courses V X Line Course ID Students Students	Fee Rental SPT SPT Schools must have the selected fee code Students that meet the selection criteria w f no selection criteria is provided, the fee Grade ↔ 09 10 11 12	Category Cat	Chooser (Fees \$50.00 \$10.00 \$25.00 pplied to them. applied to all the students. Chooser (

Figure 2.3 – Mass Assign Fees screen

 Select the students you would like to assign the school fees to by using the filters in the Select Students By group box, or the Chooser button in either the Courses or Students group boxes.



Tip: You can make multiple filter selections. When you select a combination of filter options, they act as "AND" selections, such as males AND 12th graders.



Note: In this example, we are selecting students. However, the process is the same to add courses to the **Courses** grid.

Find Select																	
Choose	Chooser																
Find Criteria	Find Criteria																
Perm ID	Perm ID Last Name First Name Middle Name Suffix Grade Gender																
v v																	
Add Selected Row(s) > Add All Row(s) >>																	
Search Res	Search Results																
Find Result						()	Se	lecte	d Items						0	-
Line Perm	Last Name	First	Middle	Suffix	Grade	Gende	r	×	Line	Perm	Last Name	First	Middle	Suffix	Grade	Gender	
1873813	Wachter	Douglas	loseph		12	Male			1	005492	Abbott	Dilly	rwame		10	Mala	
2888629	Waite	Ruth	A		12	Femal	P			905483	ADDOLL	Billy	C To da		12	Male	
3165646	Walbeck	Joan	Marie	4	10	Femal	e		2	873985	Adams	Howard	IODD		12	Male	E
4873975	Waldeck	Nicholas	R		12	Male			3	952357	Aguirre	Jason	Koerner		12	Male	
5966551	Waldie	Donna	Jo		10	Femal	e		4	963723	Barcus	Kenneth	Joseph		11	Male	
6151348	Walker	Angela	Kristine	1	10	Femal	e			148738	Barnes	Wanda			10	Female	
7888039	Walker	Lawrence	William		11	Male		1	6	910222	Castillo	Heather			12	Female	
8874559	Walker	Randy	G		10	Male				890774	Castillo	Steve	M		11	Male	
9133910	Wallace	Andrew	К		10	Male			8	914384	Cenatiempo	Shawn	S		10	Male	
10101258	Walser	Bonnie	Anne		10	Femal	е		6	037048	Davis	Susan	Michele		10	Female	
11 925588	Walsh	Angela	F	1	10	Femal	е		- 40	040450	Davis	Mark	larama		10	Mala	
12913434	Walsh	Doris	Franziska		10	Femal	e			916452	Davis	IVIAI K	Jerome		11	wale	
13902991	Walsh	Russell	Р		10	Male			11	940087	Garza	Jonn	М		10	Male	
14888712	Waltemeye	Paula	Jacquelyn	1	12	Femal	е		12	874071	Gardner	Raymond	IL .		12	Male	
15874341	Walter	Paul	Samuel		12	Male				118615	lpsen	Anthony	Robert		10	Male	
16887709	Walz	Donald	E		11	Male			14	112046	Ibarra	Mark	Alejandro	1	12	Male	
17 903451	Wamboldt	Albert	R	1	10	Male				132614	Wallace	Johnny	N	1	10	Male	
18 <mark>873861</mark>	Wamboldt	Mary	L		12	Femal	e		16	966548	Waldie	Lois	Leigh		12	Female	
19888166	Wamsley	Deborah	Dawn		11	Femal	e	100	1.10	555540	Trainic	2013	Loigh		12	- cindic	-

Figure 2.4 – Student Chooser screen

- 11. Find and select the appropriate student.
- 12. Click **Select**. The students display in the **Students** grid on the **Mass Assign Fees** screen.

Menu 🗸				Status: Ready 🕺 🖓 🐴
VMass Assign Fe	es			
Mass Assign				
Action	Transaction Date			
Assign Fees	09/25/2013 Mass Assign Fees			
Process Validation		Student	School Processing	
Mass Assign Input Validation F	Rules	Apply	fees changes to studer	ts in their home school
Transaction Date / Fee Code	/ Mass Assign Indicator (Default)		fees changes to studer	ts in concurrent schools
			ices changes to studer	its in concurrent schools
Note 🕎 🕥				
1. Select Fee Codes	Select the fee codes t	hat will be applied to the sele	cted students.	
Fee Codes				Chooser 🔇
X Line Fee Code	Description	Fee Category	Fees	Choosar (S
DI 1 BDI	Band Instrument Rental	SPT	\$50.00	
2 BDL	Band Locker	SPT	\$10.00	
BDU 3BDU	Band Uniform	SPT	\$25.00	
2. Student Selection Criteri	ia Schools must have the	e selected fee code.		
	Students that meet the	e selection criteria will have th	e fee codes applied to t	hem.
	If no selection criteria	is provided, the fee codes ch	anges will be applied to	all the students.
Conter				
Select Students By				()
Gender	Grade			
		2		
Courses				Chooser 🔇
X Line Course ID		Course Title		
Students				Chooser 🙆
	Student Name		Grade	Gender
1902873	Cargiulo, Frances D.		10	Female
2 931314	Foster, Lori		10	Female
3883582	Centner, Lawrence W.		12	Male

Figure 2.5 – Mass Assign Fees screen

13. Click **Mass Assign Fees**. The **Job Status** screen displays the job's process. When the job is complete, a confirmation message displays and the fees appear on the appropriate students' Student Fee screen.

Check Status Later Abort	Status: Ready 🕝
Job Status	
Job Detail	۵
Job ID Description	
MassAssignFe Mass Assign Fees	
Status	<u></u>
In progress: Hope High School Finding student data that match selection criteria	.::
NOTE: This view will refresh regularly (until the job is complete) updating the status.	

Figure 2.6 – Job Status screen



Figure 2.7 – Confirmation message

ASSIGNING FEES TO AN INDIVIDUAL

Assigning a fee to a student

1. Navigate to **Synergy SIS > Fees - Standard > Student Fees**. The **Student Fees** screen displays.

Menu 🕶 🛞 🛞 😹 Save Undo Status: Ready 🗟 🖓												
Student	Fees									»	🌆 🚳	
Student Name: Ab	rigo, Scott Scho	ol: Hope High School	Status: Active Homeroom:									
Fees History	Fee System											
Last Name	First Name	e Middle N	lame Suffix Perm ID	Grade	G	ender						
Abrigo	Sco**	Name: Scott(60 - STRIN	G) - (K12-Student-EirstName)	11	M	ale 🞽						
Fees	Payments	Balance	Fee Total Type									
\$0.00	\$0.00	\$0.00	Total fees for all organization	ons and focus	ye 💌							
Student Fees											Add 🕥	
× Line Transac	ction 🔶 Fee Code		Description	¢		Payments 🔶	Balance	Fee Category 🔶	Note			
1 5/14/201	2 📝	~						×	\$			

Figure 2.8 – Student Fees screen – Add button

- 2. Find or scroll to the appropriate student record.
- 3. Click Add. A new row appears in the Student Fees grid.
- 4. Enter the appropriate information in the **Fee Information** group box.
 - Transaction Date the date on which the fee was assigned or incurred.
 - **Fee Code** the abbreviated School Fee Code. This value is set on the <u>School</u> <u>Fee Codes</u> screen.
 - **Description** the standard description based on the fee code selected. This description can be edited.
 - Fee the amount charged for this fee.
 - Payments a payment made for this particular fee.
 - **Balance** the remaining for this fee.
 - **Fee Category** the fee group that this school fee should fall under. The fee category options are set in the <u>Fee Category</u> Lookup table. A different Fee Category can be selected here.
 - Notes record any details or instructions related to this particular fee.
- 5. Click Save.

Chapter Three: ENTERING FEE PAYMENTS

In this chapter, the following topics are covered:

Entering Payments

Edupoint Proprietary and Confidential

ENTERING PAYMENTS

A payment can be recorded against a specific fee. It also can be recorded as a general payment against the total balance.

Recording a payment to an individual fee

- 1. Navigate to **Synergy SIS > Fees Standard > Student Fees**. The **Student Fees** screen displays.
- 2. Find or scroll to the appropriate student record.

Menu 🗸 🛞 🛞 🧊 Save Undo	nu 🔍 🛞 🛞 🖾 📅 Save Undo Status Ready 🥯 🖓 💱 🙆											
VStudent Fees									>>	₩ 6	3 麗	
Student Name: Abernathy, Bruce V. School: Hope Hig	h School Status: Ac	tive Homeroom:										
Fees History Fee System												
Last Name First Name Middle	Name Suffix	Perm ID	Grade	Gend	ler							
Abernathy Bruce Vanlee	e	879138	12	Male	~							
Fees Payments Balance	Fee Total Type											
\$60.00 \$0.00 \$25.00	Total fees for all	organizations ar	nd focus ye 💌									
Student Fees										Add		
X Line Transaction Date ⇒ Fee Code				•	Payments 🤤	Balance	Fee Category	Note				
								🕎 🔇				
□ 1 04/03/2012 📅 CBK 🛛 🗠 Book Da	images			615.00	15	\$15.00	TXT	·				
								()				
2 04/04/2012 P CBK Damage						\$15.00	TXT	Fee: AFTR - Af	ter School Pre	ogram		
			1.1					F			_	
☐ 3 05/14/2012 → FTG Field Trip	p - Senior Graduation	1		510.00		\$25.00	SCH	<				
				_						_		
105/15/2012 TILAB	oriale			25 00		\$60.00	CDS					
	enais			35.00		\$60.00	CRO					

Figure 3.1 – Student Fees screen – Direct Payment model - Add button

- 3. Select the fee from the Student Fees grid.
- 4. Enter the amount of the payment received in the **Payments** column.
- 5. Click **Save**. The balance updates on the line item and on the student's overall fee information.

Men	teru 🔍 🔍 🛞 📁 Indo Status: Ready 😂 🖓 👬 🖓																			
7	Stu	dent Fe	es															(>> <mark> </mark> 3	1 8	
Stud	ent Na	ame: Aberna	thy, E	ruce V	. School	Hope High	School	Status: A	Active Homer	oom:										
Fee	s H	istory Fee	System	1																
Last	Name	•	Firs	st Name	2	Middle N	ame	Suffix	Perm ID	Grade	Gei	nder								
Abe	rnathy	/	Bri	lice		Vanlee		J	879138	12	Ma	e 🞽								
Fee	5	Pay	ments		Balance		Fee To	tal Type												
\$75	.00	\$15	.00		\$60.00		Total fe	ees for a	II organizatio	ns and focus	ye 🚩									
Stu	dent F	ees																F	Add] 🕥
×		Transactio Date		Fee Co					iption				s 🤤 Balanc	e Fee Cat	egory 😂	Note				
		0.1/00/0010	100	0.01/										DIT		9 🔇				
		04/03/2012	17	CBK	~	Book Dam	ages				\$15.0	\$15	5.00 \$0.0		~					
																\$				
		04/04/2012	P	CBK	~	Damage					\$15.0		\$15.0	TXT 0	~	Fee: AFTF	R - After Sch	ool Prog	ram	
																				:
		05/14/2012	1	FTC	~	Ciald Tria	Casies	Conductio			610.0		COE 0	SCH.	~	20				
		03/14/2012	UP.	110		Field Trip -	Sellior	Graduatio	511		\$10.0	,	525.0	5011						
															1	9				
		05/15/2012	7	LAB	~	Lab Materi	als				\$35.0)	\$60.0	CRS	~					
																				d i

Figure 3.2 – Student Fees, Fee Added

Recording a general payment

- 1. Navigate to **Synergy SIS > Fees Standard > Student Fees**. The **Student Fees** screen displays.
- 2. Find or scroll to the appropriate student record.

Menu	•		SP -	Sav	/e Und	D									Status: Ready 😂 🖓 👬
75	stu	dent Fee	s												> 🍡 🍪 🖺
Stude	ent N	ame: Abernat	hy, B	ruce V	. School:	Hope High	School Status:	Active Homer	oom:						
Fee	H	istory Fee Sy	/stem												
Last	Vame	2	Firs	t Name		Middle N	lame Suffix	Perm ID	Grade		Geno	der			
Aber	nath	y	Bru	ce		Vanlee		879138	12	~	Male	*			
Fees		Paym	ents		Balance		Fee Total Type								
\$75.	00	\$15.0	00		\$60.00		Total fees for a	Il organization	ns and focus y	€ ~					
Stud	ent	Fees													Add
×		Transaction Date									4		Balance	Fee Category 🖨 Note	
i														1	
		04/03/2012	P	CBK	~	Book Dam	nages			S	15.00	\$15.00	\$0.00	TXT 💌	
			_							-					
		04/04/2012	17	СВК	~	Damage				s	15 00		\$15.00	PAY-Payment	After School Program
														ACT-Activity Based Fees	
			_		1									CRS-Course Related Fees	
		05/14/2012	P	FTG	~	Field Trip -	- Senior Graduati	on		S	10.00		\$25.00	ENR-Enrollment Based Fees	
			-											OPT-Optional Fees	
		05/15/2012	17	LAB	~	Lab Materi	ials			s	35.00		\$60.00	SCH-School Related Fees	
														SPT-Sports	
			_		-									TXT-Textbook	
		5/16/2012	P		~	Fee Paym	ient					\$60.00			
				· · · · · · · · · · · · · · · · · · ·		_									

Figure 3.3 – Student Fees screen – Direct Payment model - Add button

- 3. Click Add. A row displays at the bottom of the Student Fees grid.
- 4. Enter the information for the payment in the row.
- 5. In the **Fee Category**, select the **Payment** option (if you have set a Payment option up in the <u>Lookup Tables</u>.)
- 6. Click **Save**. The balance updates on the line item and on the student's overall fee information.

Mer	nu 🔻	-		Ch.	Sa	ve Und	io													Status: F	Ready	9 5	10
Y	St	tu	dent Fee	s																	×	> 3/	۵
Stu	Iden	nt Na	ame: Abernat	hy, E	Bruce \	I. School	: Hope High	School	Status: A	ctive Homero	om:												
Fe	ees	Н	istory Fee Sy	/sten	1																		
Las	st Na	ame	•	Firs	st Name	e	Middle N	lame	Suffix	Perm ID	Grade		Gen	der									
Ab	erna	athy	/	Bri	Jce		Vanlee			879138	12	~	Male	*									
Fee	es		Paym	ents		Balance		Fee To	otal Type														
\$7	5.0	0	\$75.0	00		\$0.00		Total f	fees for all	organization	s and focus	ye 💙											
St	ude	ent F	ees	_				-														Add	
×	(1		Transaction Date													Balance			Note				
																			💱 🏈				
	1		04/03/2012	P	CBK	~	Book Dan	nages				9	15.00	\$1	15.00	\$0.00	TXT	~					
												_	_										
			04/04/2042		ODIC		-						45.00			A	THE						
			04/04/2012	17	CBK	~	Damage						15.00			\$15.00	IXI	~	Fee: AFTR	- After Sc	hool Pi	rogran	n .::
			Second and the second																🕎 🥥				
	3		05/14/2012	P	FTG	~	Field Trip	- Senior	Graduation	n		9	10.00			\$25.00	SCH	~					
												-	_			-			-				:
			05/15/2012	[75,7]	LAD			(25.00			***	CDC		1 Co				
	1		05/15/2012	U7	LAD	v	Lab Mater	lais				3	35.00			\$60.00	CKS	*					
																	1		🕎 🔇				
			05/16/2012	P	FTG	~	Fee Paym	nent						\$6	50.00	\$0.00	PAY	~					

Figure 3.4 – Student Fees, Fee Added

Chapter Four: VIEWING FEE & PAYMENT HISTORIES

In this chapter, the following topics are covered:

- Viewing Fee History
- Viewing Fee System Transactions

VIEWING FEE HISTORY

The History tab of the Student Fees screen shows the student's fees for all school and all years. Each line item fee shows the transaction date, fee code, description, the fee, any payments, fee category, notes, as well as the associated school and year.

Accessing the fee history

- 1. Navigate to Synergy SIS > Fees Standard > Student Fees > History tab.
- 2. Find or scroll to the appropriate student record.

Menu	• « Q »	Save	Undo						📀 🜉 Status: Re	ady 🕄 🖓
75	Student Fees	s								
Stude	ent Name: Abbott, B	Silly C. School: H	Hope High School Sta	atus: Active	Homeroom: 234	1				
Last I Abbo	Name ott	First Name Billy	Middle Name	Suffix	Perm ID 905483	Grade 12	*	Gene	der	
Stud	lent Fees									٥
Line	Transaction Date	🚖 Fee Code	Description 🔶	Fees	Payments 👙	Fee Category	0	Note	School	😂 School Year
2	03/01/2010	TXT	Pavment	\$5.00	\$5.00	IXI PAY	-	-	Hope High School Hope High School	2009-2010

Figure 4.1 – Student Fees History Screen

VIEWING FEE SYSTEM TRANSACTIONS

The **Fee System** tab of the **Student Fees** screen displays a list of student fees that were paid using an <u>online payment service</u>. The Fee System Transaction grid lists each transaction, including the Parent's name, the fee code, fee description, fee, fee date, payment, payment date, and any errors the fee system may have encountered.

Accessing the fee system history

- 1. Navigate to Synergy SIS > Fees Standard > Student Fees > Fee System tab.
- 2. Find or scroll to the appropriate student record.

Menu 🕶 🛛 🔇 🛞 🛛	Save Save	Undo Quick Payment	t				(🖻 💐 st	atus: Ready	T. 🐉 🕜
Student Fee	S									~
Student Name: Abbott, I	Billy C. School:	Hope High School Statu	us: Active	Homeroom:	231					
Fees History Fee S	ystem									
Last Name	First Name	Middle Name	Suffix	Perm ID	Grade	(Gender	- 72		
Abbott	Billy	C		905483	12	~	Male 👌	•		
Fee System Transaction	າຣ									()
Line Parent Name	Fee Code 😂	Fee Descriptio	n	🔶 Fee ಿ	Fee I	Date	Payme	ent 🍣	Payment Date	⊜ Error
Aaron, Kathleen	BUS	Sports Transportation	n	25.00	05/10/2012	12:39:52				
2 Aaron, Kathleen	CBK	Course Required Tex	t Book	65.00	05/10/2012	12:39:52				
3 Aaron, Kathleen	BDI	Band Instrument Ren	tal	50.00	05/10/2012	12:39:52				
4 Aaron, Kathleen	LAB	Lab Materials		542.50	05/10/2012	12:39:52				
5 Aaron, Kathleen	BDL	Band Locker		10.00	05/10/2012	12:39:52				
6 Aaron, Kathleen	BDU	Band Uniform		25.00	05/10/2012	12:39:52				
7 Aaron, Kathleen	BUS	Sports Transportation	n	25.00	05/10/2012	12:40:08				
8 Aaron, Kathleen	CBK	Course Required Tex	t Book	65.00	05/10/2012	12:40:08				
9 Aaron, Kathleen	BDI	Band Instrument Ren	tal	50.00	05/10/2012	12:40:08				
10 Aaron, Kathleen	BDU	Band Uniform		25.00	05/10/2012	12:40:08				
11 Aaron, Kathleen	BDL	Band Locker		10.00	05/10/2012	12:40:08				
	A RECEIPTION OF A RECEIPTION O	A MARKAN A MARKAN AND A SAME MARKAN AND		and the second se						

Figure 4.2 – Student Fees History Screen

Chapter Five: RUNNING REPORTS

In this chapter, the following topics are covered:

- Accessing Reports
- FEE201 Student Fee Profile
- FEE401 Student Fee List
- FEE402 Student Fee Collection List

Accessing Available Reports

The following reports are available in Standard mode:

- FEE201 Student Fee Profile
- <u>FEE401 Student Fee List</u>
- FEE408 Fee by Class

To Access Reports

- 1. Navigating to **Synergy SIS > Fees Standard > Reports**.
- 2. Click on the name of the report.
- 3. Select the options to be used in generating the report (listed in the following sections.)
- 4. Click **Print**. The report displays as a PDF file, which you can then send to the printer.



Note: For the purposes of this manual, only the report settings and filters available on the **Options** tab of the report interface are detailed. Additional options are available on the other report interface tabs. For more information on the additional options on the report interface tabs, please refer to the manual titled *Synergy SIS* – *Query & Reporting Guide*.

FEE201 – STUDENT FEE PROFILE

The Student Fee Profile creates detailed individual reports of all fees assigned to each student. This report includes the date the fee was incurred, the fee code, fee category, a description of the fee, associated notes, the fee amount, any payments received, and the current balance due.

Note: The Fee201 report is also available on the **Student Fees** screen by selecting **Menu > Report > Student Fee Profile**.

This report can be filtered using the following settings on the **Options** tab:

Print Save Default Reset Default Email Me Status: Ready 🔂
Name: Student Fee Profile Number: FEE201 Page Orientation: Portrait
Options Sort / Output Conditions Selection Advanced
Student Info
Perm ID Gender
Last Name First Name Middle Name
Grade
Options (
Sort and Display by Organization
Fee Filters
Transaction Date
Scope of Fees to Include
Include fees for focus organization and focus ye
Fee Codes can only be selected when 'Scope of Fees to Include' is set to 'Include fees for focus organization and focus year' and focused at a school year.
Fee Codes
Fee Code D⇔D
BK - Book Damages BND - Jazz Band Fee BUS - Football Transportation BUS1 - Out of District Transportation
YBK - Year Book
Fee Categories
Fee Category D⇔
Lab Fee Payment Parking Permit Yearbook
Textbook

Figure 5.1 – Student Fee Profile Report Interface

- Student Info select an individual student or group of students based on the Student ID, Gender, Last Name, First Name, Middle Name, or Grade. Example: if grade 12 is selected the report prints an individual report for each student in grade 12.
- Sort and Display by Organization sorts the report by school name.

- Transaction Date includes fees for a particular date or date range. The dates must be entered in MM/DD/YY format or they can be selected by clicking on the Calendar IP button.
- **Scope of Fees to Include** selects how the fees will be displayed and summarized. The options include:
 - Total fees for focus organization and focus year (school focused only)
 - Total fees for focus organization and all years (school focused only)
 - Total fees for all organizations and focus year (district focused only)
 - Total fees for all organizations and all years (district focused only)
- Fee Code only includes selected fee codes in the report. Fee codes are defined in the <u>School Fee Codes</u> screen.
- Fee Category- only includes selected fee categories in the report. Fee categories are defined in the Fee Category Lookup Table.

General In	formation			Hop Stud Fees for	dent F all Sch	h Sc ee Pr ools -	hool ofile All Years				Year: 2012 Report: FEE	2-2013 201
Student Nam	, Billy C.			Perm II 905): 483		Gender: M	Grade: 12				
Date	Fee Code	Description	Note			Fees	Payments	Waived	Refund Needed	Refund	Balance	
11/06/2012 Payment Date	BK e Trans. ID	Tom Cover: Great Expectations Payment Method	Payment Note	2	Status	5.00 Pa	5.00 ment Amount				0.00	
08/30/2012	19	Cash			Successfu		5.00 5.00					
11/13/2012	BK Trans. ID	Book Damages		ł	Status	Pa	0.00 yment Amount				0.00	
01/10/2013	BK Trans. ID	Lost Book: Algebra	II	2	Status	45.00 Paj	0.00 yment Amount	45.00	50.00	50.00	0.00	
				Totals:	9	50.00	5.00	45.00	50.00	50.00	0.00	
Printed by Admin	1 User at 09/25	/2012 4:44 PM		E	dupoint Sc	hool Dist	let					Page 1 o

Figure 5.2 – Student Fee Profile Report

FEE401 – STUDENT FEE LIST

The Student Fee List report prints out a list of only those students with a fee balance. This report includes the student's name & Perm ID, the total fees & payments the student has incurred, and the student's current balance due. All students are compiled into a single list.

This report can be filtered using the following settings on the **Options** tab:

Print Save Default Reset Default	Email Me		Status: Ready
✓Report Interface			» 🖉
Name: Student Fee List Number: FEE4	01 Page Orientation: Portrait		
Options Sort / Output Conditions	Selection Advanced		
Student Info			<u></u>
Grade			
Fee Filters			Q
Transaction Date			
All Balances			
Scope of Fees to Include			
Include fees for all organizations and a	II years 💌		
Fee Codes and Fee Categories can or	nly be selected when 'Scope of Fe	ees to Include' is set to 'Include fees f	or focus organization and focus year'.
Fee Codes			٥
Fee Codes			
414 - District Course	Pee 12-13 ()	BVEF - BV Ed Foundation Gift (\$30 req ()	COURSE - Course Fee BVH 12-13
FAMAP - Family Activity Pass 12-13 BVH	FINES - Fines/Holds 12-13 BVH	IAAP - Individual Adult Activity Pass ()	LDLIBR - Lost/Damaged Library Book 12-1 ()
LDTEXT - Lost/Damaged Textbook 12-13 BV ()	LRF - Learning Resources	MEALS - Meals - Minimum	NEWS - Student Newspaper
NSF - NSF Check Charge 12-13 BVH	PAPROM - PTO After Prom 12-13 BVH	PDON1 - PTO/PTA Donation (\$75 suggeste ()	PMEM - PTO/PTA Membership 12-13 BVH
PRKFIN - Parking Fine 12-13 BVH	PRKPMT - Parking Permit 12-13 BVH	PSAT - PSAT (10th and 11th grades onl ()	STAP - Student Activity Pass 12-13 BV ()
TSF - Technology Supply Fee 12-13 BV ()	VRBOOK - Yearbook 12-13 BVH		
Fee Categories			0
Fee Category → → → → → → → → → → → → → → → → → → →	ional School PTO/PTA/Bo allment Meals Blue Valley E	ooster Education Foundation	

Figure 5.3 – Student Fee Profile Report Interface

- **Grade** select a group of students based on their grade. For example, if grade 12 is selected the report prints an individual report for each student in grade 12.
- Transaction Date includes fees for a particular date or date range. The dates must be entered in MM/DD/YY format or they can be selected by clicking on the Calendar IP button.
- Balances To Include includes either all balances or only non-zero balances.
- **Scope of Fees to Include** selects how the fees will be displayed and summarized. The options include:
 - Total fees for focus organization and focus year (school focused only)

- Total fees for focus organization and all years (school focused only)
- Total fees for all organizations and focus year (district focused only)
- Total fees for all organizations and all years (district focused only)
- Fee Code only includes selected fee codes in the report. Fee codes are defined in the <u>School Fee Codes</u> screen.
- Fee Category- only includes selected fee categories in the report. Fee categories are defined in the Fee Category Lookup Table.

				rioperngi	school			Year: 2012-2013	1
				Student F	ee List		1	Report: FEE401	
And Desire			Fees	for Hope High S	ichool - 2012-2	2013			
Skuleni Kame	Perm ID	Gender	Grade	Total Fees	Total Payments	Total Walved	ReiLind Reeded	Tolai Reiunds	Balance
icos la, John A.	150265	Male	11	285.00	0.00	185.00	0.00	0.00	100.00
cunia, lenne h 0 .	110412	Male	10	295.00	0.00	178.57	0.00	0.00	116.43
dair, Alan W.	87 1626	Male	11	290.00	0.00	150.00	0.00	0.00	140.00
idair, Diane N.	903912	Female	10	312.00	0.00	225.57	0.00	0.00	85.43
dair, Timolhy S.	888521	Male	11	245.00	0.00	150.00	0.00	0.00	95.00
dams, Alber IL.	889844	Male	11	248.00	0.00	150.00	0.00	0.00	98.00
dams, Bruce	142724	Male	10	245.00	0.00	150.00	0.00	0.00	95.00
Hamrs, Larry A.	889314	Male	11	245.00	0.00	150.00	0.00	0.00	95.00
dams, Marin C.	887623	Male	11	270.00	0.00	150.00	0.00	0.00	120.00
dams, Slephen J.	901622	Male	10	255.00	0.00	150.00	0.00	0.00	105.00
damski, Alan M.	87 2035	Male	10	255.00	0.00	150.00	0.00	0.00	105.00
dkins, Ryan C.	924037	Male	10	245.00	0.00	150.00	0.00	0.00	95.00
guado, Bobby J.	943822	Male	10	255.00	0.00	150.00	0.00	0.00	105.00
gullar, Carolyn C.	902692	Female	10	255.00	0.00	150.00	0.00	0.00	105.00
gullar, Slephen A.	108367	Male	11	290.00	0.00	150.00	0.00	0.00	140.00
guirre, Mary R.	952375	Female	11	265.00	0.00	150.00	0.00	0.00	115.00
Hviskrom, Jack M.	888112	Male	11	245.00	0.00	150.00	0.00	0.00	95.00
histom, Linda K.	120451	Female	10	255.00	0.00	150.00	0.00	0.00	105.00
Hichlson, Karen L.	902998	Female	10	255.00	0.00	150.00	0.00	0.00	105.00
4kagawa, Adam H.	165923	Male	11	310.00	0.00	150.00	0.00	0.00	160.00
ke,JoshuaJ.	889794	Male	11	245.00	0.00	150.00	0.00	0.00	95.00
kin, Andrea E.	902875	Female	10	355.00	0.00	150.00	0.00	0.00	205.00
Harcon, Frank	886651	Male	10	275.00	0.00	150.00	0.00	0.00	125.00
icazar, Bugene	141666	Male	10	300.00	0.00	150.00	0.00	0.00	150.00
Acazar, Eugene A.	141517	Male	10	255.00	0.00	150.00	0.00	0.00	105.00
Ader, Brenda I.	967 969	Female	10	255.00	0.00	150.00	0.00	0.00	105.00
Hexander, Joseph J.	901626	Male	10	272.00	7.00	150.00	0.00	0.00	115.00
Ager, Phyllis A.	149884	Female	10	252.00	0.00	150.00	0.00	0.00	102.00
Hen, Aaron L. JR	992938	Male	10	312.00	0.00	150.00	0.00	0.00	162.00
flen, Andrea	904134	Female	10	252.00	0.00	150.00	0.00	0.00	102.00
nen, sonas J.	883223	Mare	10	252.00	0.00	150.00	0.00	0.00	102.00
nien, Bizabeln	886019	remaie	11	245.00	0.00	150.00	0.00	0.00	95.00
nien, Eugene C.	887238	Male	11	245.00	0.00	150.00	0.00	0.0	95.00
nien, Jeremy S.	8/9/16	Male	10	252.00	0.00	150.00	0.00	0.00	102.00
nen, Julin D.	903040	Female	10	252.00	0.00	150.00	0.00	0.00	102.00
nen, Aaren	891969	remaie famaic		245.00	0.00	150.00	0.00	0.00	95.00
nen, Kuby D. Blan, Sandra E	888116	Female	10	245.00	0.00	190.00	0.00	0.00	172.00
nen, aanuna e.	001031	remate	10	272.00	0.00	150.00	0.00	0.00	122.00
Heni Dinne P	901931	Female	10	252.00	0.00	150.00	0.00	0.00	102.00
Henri, Dane B.	901907	remate		20200	0.00	150.00	0.00	0.00	102.00
ninger, senjamin K. Ninger, Kangala B	9677.27	Male	11	245.00	0.00	190,00	0.00	0.00	130.00
Husen, North Control.	000476	Male		2/000	0.00	150,00	0.00	0.00	ar ~~
nneo, Danio A. Anneo, Malla M	888125	Male	11	245.00	0.00	190,00	0.00	0.00	95.00
inas, reny m. Jonno, Parmond C	920152	remate Maia		245.00	0.00	150.00	0.00	0.00	
torso, raymond o.	901639	Male	10	270.00	0.00	150.00	0.00	0.00	120.00

Figure 5.4 – Student Fee List Report

FEE402 – STUDENT FEE COLLECTION LIST

The Student Fee Collection List creates detailed individual reports of all fees that students currently owe. This report includes the date the fee was incurred, the fee code, fee category, a description of the fee, the fee amount, any payments received, any waived or refunded amounts, and the current balance due.

This report can be filtered using the following settings on the **Options** tab:

Print Save Default Reset Default	Email Me		Status: Ready
			» 🖌
Name: Student Fee Collection List N	lumber: FEE402 Page Orientation: L	andscape	
Options Sort / Output Conditions S	Selection Advanced		
Student Info			Q
Student ID			
Last Name First Name	Middle Name		
Grade			
<u> </u>			
Fee Filters			Q
Transaction Date			
Minimum Bolones Amount			
Minimum Balance Amount	Comments 🕎 🛇		
Scope of Fees to Include			
Include fees for all organizations and al	I years 👻		
Foo Codeo and Foo Cotogories can on	ly be coloried when Cropp of Fr	an to include is not to Whelude food fo	or focus organization and focus year"
Fee Codes and Fee Gategories carron	iy be selected when scope of re	ses to include is set to include lees it	n locus organization and locus year.
Fee Codes			
A14 - District Course	APF - Activity Programming	BVEF - BV Ed Foundation Gift	COURSE - Course Fee BVH
FAMAP - Family Activity Pass	Fee 12-13 ()	(\$30 req ()	12-13
12-13 BVH	BVH	Pass ()	Book 12-1 ()
LDTEXT - Lost/Damaged Textbook	LRF - Learning Resources 12-13 BVH	MEALS - Meals - Minimum \$30.00 12 -13 ()	NEWS - Student Newspaper 12-13 BVH
NSF - NSF Check Charge 12-13 BVH	PAPROM - PTO After Prom 12-13 BVH	PDON1 - PTO/PTA Donation (\$75 suggeste ()	PMEM - PTO/PTA Membership 12-13 BVH
PRKFIN - Parking Fine 12-13 BVH	PRKPMT - Parking Permit 12-13 BVH	PSAT - PSAT (10th and 11th grades onl ()	STAP - Student Activity Pass 12-13 BV ()
TSF - Technology Supply Fee 12-13 BV ()	PRBOOK - Yearbook 12-13 BVH		
Fee Categories			0
Fee Category			
Course Required	S Optional	School	
Meals Blue Valley Ed	ucation Foundation		

Figure 5.5 – Student Fee Collection List Report Interface

 Student Info – select an individual student or group of students based on the Student ID, Last Name, First Name, Middle Name, or Grade. For example, if grade 12 is selected the report prints an individual report for each student in grade 12.

- Transaction Date includes fees for a particular date or date range. The dates must be entered in MM/DD/YY format or they can be selected by clicking on the Calendar IP button.
- **Minimum Balance Amount** the minimum amount owed to be included on the list. If the minimum balance is \$100, then only students who owe more than \$100 will be included in the report.
- **Scope of Fees to Include** selects how the fees will be displayed and summarized. The options include:
 - Total fees for focus organization and focus year (school focused only)
 - Total fees for focus organization and all years (school focused only)
 - Total fees for all organizations and focus year (district focused only)
 - Total fees for all organizations and all years (district focused only)
- **Comments** is a message or description that appears on each student's collection fee list report.
- Fee Code only includes selected fee codes in the report. Fee codes are defined in the <u>School Fee Codes</u> screen.
- Fee Category- only includes selected fee categories in the report. Fee categories are defined in the Fee Category Lookup Table.

			Fee	King H Student Fe es for King H	High School e Collectior igh School - 20	List 12-2013						
Student Name: Aaron , Harold N.				Perm 98	10: 8257		Gender: M		Grade: 10			
Parent Info	rmation											
Parent Name: Walker, Johnny				Home Addre 1955 Val V Mesa, AZ	ss: /ista Dr 85204			Mail Address: 1955 Val Vista Mesia, AZ 8520	Dr 14			
Fee Informa	tion											
Date	Code	Category	Description	n		Course	2	Fees	Payments	Waived	Refund	Balance
10/19/2012	240	GYM	PElocker1	ee -		•		\$7.00	00.02	\$0.00	\$0.00	\$7.00
Payme	nt Date	PaymentM	ethod	Pay	yment Notes					s	Al ub Total:	mount
							Totais	\$7.00	\$0.00	\$0.00	\$0.00	\$7.00

Figure 5.6 – Student Fee List Report

Chapter Six: SETTING SECURITY

In this chapter, the following topics are covered:

- School Fee Codes Security
- Student Fees Security
- Fees Reports Security

Security for each of the screens discussed throughout this manual is defined by two options: the **PAD Security** screen and the **Security Definition** screen. Both of these screens are found under Synergy SIS > System > Security. How each of these screens work and how security is defined is covered in detail in the **Synergy SIS - Security Administrator Guide**. This chapter outlines where the security for each part of each student information-related screen may be defined in the Security Definition screen.

SCHOOL FEE CODES SECURITY

The entire **School Fee Codes** screen, found under Synergy SIS > Fees - Standard > Setup, is controlled by this security node:

School Fee Codes											
School: Hope High School FullYear: 2010-2011											
Fee Codes											
Fee Total Type											
Tota	al fees	for all years a	and all organizations 🛛 👻								
School Fee Codes									Add		
×	Line	Fee Code 🖨	Fee Description 🔶	Fee Category	Ş	Fee Amount 🔶		General Ledger Account			
	1	ВК	Book Damages	CRS	~		GL0001-0114				
	2	BUS	Football Transportation	SPT	~	10.00	GL0001-0214				
	8	LAB	Lab Materials	CRS	*		GL0001-0114				
	4	LKR	Locker Damages	LKR	~	5.00	GL0001-0314				
	6	PCRS	Payment for Course Fees	CRS	~						
	6	PLKR	Payment for Locker Fees	LKR	~						
	7	PSPT	Payment for Sports Fees	SPT	~						

K12.FeeInfo.Setup.SchoolFee

Figure 6.1 – School Fee Codes Screen

STUDENT FEES SECURITY

The entire **Student Fees** screen, found under Synergy SIS > Fees, is controlled by the node:

K12.FeeInfo.StudentFee

Student Fees												
Student Name: Abbott, Billy C. School Hope High School Status: Active Homerson: 231												
Fees History												
Last Name	First Name	M	iddle Name Suf	fix 👘	Perm ID	Grade		Gender				
Abbott	Bily	C			905483	12	~	Male 💌				
Fees Payments	Balance		Fee Total Type									
\$70.00 \$5.00 \$65.00			Total fees for focus organization and year 👻									
Student Fees Add G											5	
X Line Transaction Dat	e 🔅 Fee Code		Description	0	Fees 🕀	Payments 🌐	Balance	Fee Catego		Note		
11/09/2010	🗊 вк	٧	Tom Cover: Great	t Ex	\$5.00		\$5.00	TXT	~	1 S	*	
2 11/16/2010	🗊 вк	٧	Book Damages			\$5.00	\$0.00	PAY	~	10	<u>م</u>	
3 01/12/2011	🗊 UNF	٧	Jersey/shorts fee		\$10.00		\$10.00	SPT	~	🕎 🛛 Fee: BSK - Basketball	*	
4 01/12/2011	988	¥	Transportation fee	e to	\$10.00		\$20.00	BUS	~	😨 🛛 Fee: BSK - Basketball	*	
5 01/13/2011	🗊 ВК	¥	Lost Book: Algeb	na II	\$45.00		\$65.00	TXT	~	1	*	

Figure 6.2 – Student Fees Screen

The following security nodes do not provide a visible change in security on the screens:

- K12.FeeInfo.StudentFeeUI
- K12.FeeInfo.SIFStudentFee
- K12.FeeInfo.StudentFeeSummary

FEES REPORTS SECURITY

While report security options are available under the Security Definition screen, it is recommended only to use the PAD tree security to control access to reports.

INDEX

District Fee Model selecting, 15 **District Fee Options** configuring, 13 Fee Category table setting, 11 Fee History Accessing, 35 Viewing in Standard model, 35 Fee System History Accessing, 35 Fee System Transactions Viewing, 35 Fee Total Type setting, 14 FEE201 Student Fee Profile, 38 FEE401 Student Fee List, 40 **FEE402** Student Fee Collection List, 42 Fees overview, 8 Lookup Tables defining, 11 Online payments systems enabling, 15 **Optional Fees** setting up, 20 ParentVUE/StudentVUE

Enabling fee payment, 17 payment recording for individual fee, 32 recording general payment, 33 **Payment Services** enabling, 15 **Payments** Entering in Standard model, 32 Reports Accessing, 37 School Fee Codes entering, 18 entering optional, 20 School Fees Defining, 18 Security Fee Reports, 46 School Fee Codes, 45 Student Fees, 46 Standard model mass assign fee, 24 student assigning fees to, 30 Student Fee Collection List FEE402, 42 Student Fee List FEE401, 40 Student Fee Profile FEE201, 38