



Tracks – T12

Automatic Generation of Student Course-Based Fees



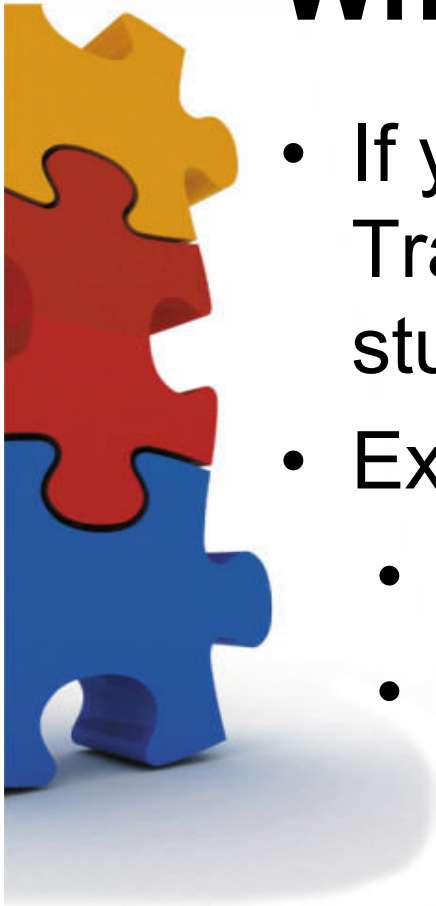
Agenda

- Why use Automatic Generation of Student Course-Based Fees?
- Importing SIS data.
- Set up items and course fees.
- Generating course fees.
- Charging the students.
- Converting course fees to debts.



Why Use Course-Based Fees?

- If you charge a fee for a specific course, Tracks can automatically charge the student based on their schedule.
- Examples:
 - Lab fee for Chemistry
 - Band fee for Advanced Band



The Setup Flow

- Import SIS data
 - Teachers
 - Courses
 - Classes
 - Schedule
- Add Items for the fees you need
- Attach the Items to specific Courses



Importing SIS Files

- Management / Special Functions / Import Export
- Import in this order
- Teachers – Helen White
- Courses – English 9 (general)
- Classes – English 9, Section 2 (specific)
- Schedules – Joe Jones, Eng 9, Period 2



Appendix K – Data File Info

- Information about what data should be included in which file.

TEACHERS

Note that the name field is one field – not last name, first name. If you want reports to sort correctly on last name, you should hand use the teacher name in the "last name, first name" format.

Field	Field Type, Length	Sample
Teacher number	A, 15	SM102 or JONES
Teacher name	A, 30	Smith, Laura or JONES, SAM

Teacher Maintenance - Play School High School

Teacher Number: WILLIAMS

Teacher Name: Tina Williams

Navigation: [Back] [Forward]

Actions: [Accept] [Cancel] [Delete]

SALLY	ZPLAY	01/31/
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Mapping Files

- Map each file just like SUU.

Classes Map Fields Wizard
This screen lets you choose or correct where the fields are in your student data.
Use the buttons to select fields to map, move them or change their size so they match your data.

Classes Data Fields

Course No. [v] Previous Field Next Field

File Data Display

Make Field Smaller Make Field Bigger

Left Faster Move Field To Left Move Field To Right Right Faster

AUSTIN	EN09	10	1	20071	R102
AUSTIN	EN09	11	2	20071	R102
AUSTIN	EN09	12	3	20071	R102
AUSTIN	EN09	13	4	20071	R102
AUSTIN	EN09	14	5	20071	R102
CARTER	FA20	15	2	20071	D7
CARTER	EN10	56	3	20071	R104

Field position = 10 size = 4

Back Next Cancel ?



Course Fees Checklist – Help

COURSE FEES CHECKLIST

Follow the checklist below for generating course fees.

	Get the correct data files from your IT department in either .csv or .txt format.
	Import Teachers , accessible under Management, Special Functions, Imports/Exports.
	Verify that your teacher data is correct. Print the Teacher Listing by going into Teacher Maintenance and clicking on the printer icon. Are these teachers really from your school?
	Import Courses , accessible under Management, Special Functions, Imports/Exports.
	Verify that your Course data is correct. Print the Course Listing by going into Course Maintenance and clicking on the printer icon. Are these the courses your school has?
	Import Classes , accessible under Management, Special Functions, Imports/Exports.
	Verify that your class data is correct. Print the Class Listing by going into Class Maintenance and clicking on the printer icon. Are these the classes your school has?
	Import Schedules , accessible under Management, Special Functions, Imports/Exports.
	Verify that your schedule data is correct. Check the Schedule Tab in Customer Maintenance for a few students.
	Set up items for each of your fees in Item Maintenance .
	Assign fees for each Course in Course Fee Maintenance .
	Generate Class Fees in Student Fee Generation .
	Receive money from students for the class fees on the Work Screen. For more information about how to load, waive, and delete fees, see " Course Fees on the Work Screen ."
	At some point in the term when you want to charge all students for all unpaid fees, you will want to Convert Fees to Debts .



Create the Item

- Create the item for your fee in Item Maintenance.

T Item Maintenance - Play School High School

Item No. LABBIO Type Service

Description Lab Fees Biology Class Last Activity

1. Main 2. Levels 3. Additional 4. Web Store

Cust Reqd Cash Only

Sundry

Taxable

Grade Limits

Department GEN

Prompt for Price

Price 57.00

Cost 0.00

Last Cost 0.00

Prompt for Quantity

Prompt GL?

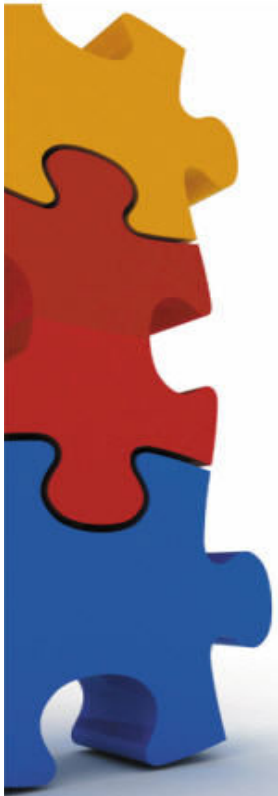
GL Account 2005-00-00

District Clearing



Thinking About Fee Names

- Use generic fee names for fees that go to the same GL Account. Like SCIFEE.
- Example: SCIFEE (\$20) is assigned to both Chemistry and Physics.
 - Joe is taking Chemistry, pays the fee.
 - Joe switches from Chemistry to Physics.
 - Tracks knows he's already paid the fee **BECAUSE THEY ARE THE SAME ITEM NUMBER.**



Assign Fee to a Course

- Customer / Course Schedule / Course Fee Maintenance
- Courses can have multiple fees.
- You can use the same fee, but charge different amounts for different classes.

T Course Fee Maintenance - Play School High School

Course No. 4010 Description Biology I

Course Fee

Item No. LABBIO
LAB FEES BIOLOGY CLASS

Amount 57.00

Comment

Number Of Semesters 1

Base on Semesters

Max Times Charge 2

Status

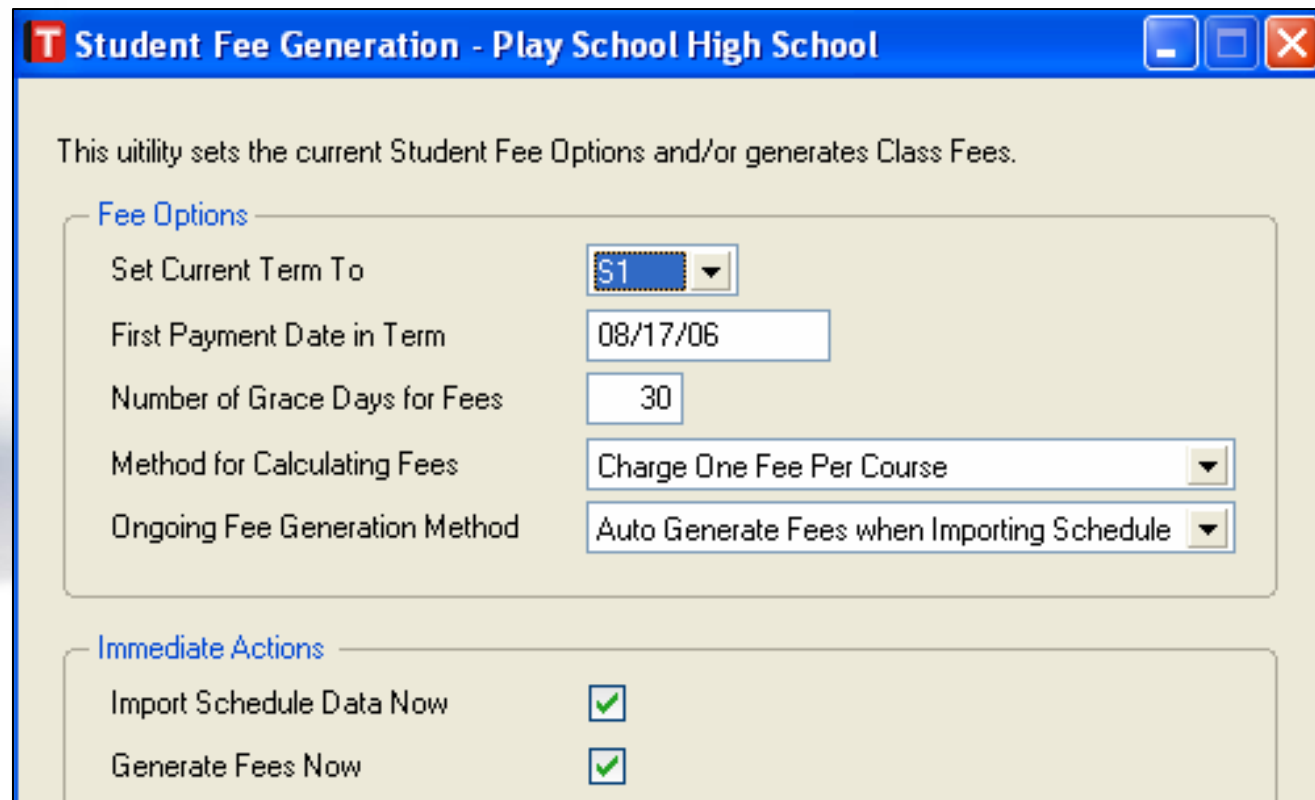
Required

OK Undo Ins Del



Course Fee Options

- Customer / Course Schedule / Utilities / Student Fee Generation



T Student Fee Generation - Play School High School

This utility sets the current Student Fee Options and/or generates Class Fees.

Fee Options

Set Current Term To	S1
First Payment Date in Term	08/17/06
Number of Grace Days for Fees	30
Method for Calculating Fees	Charge One Fee Per Course
Ongoing Fee Generation Method	Auto Generate Fees when Importing Schedule

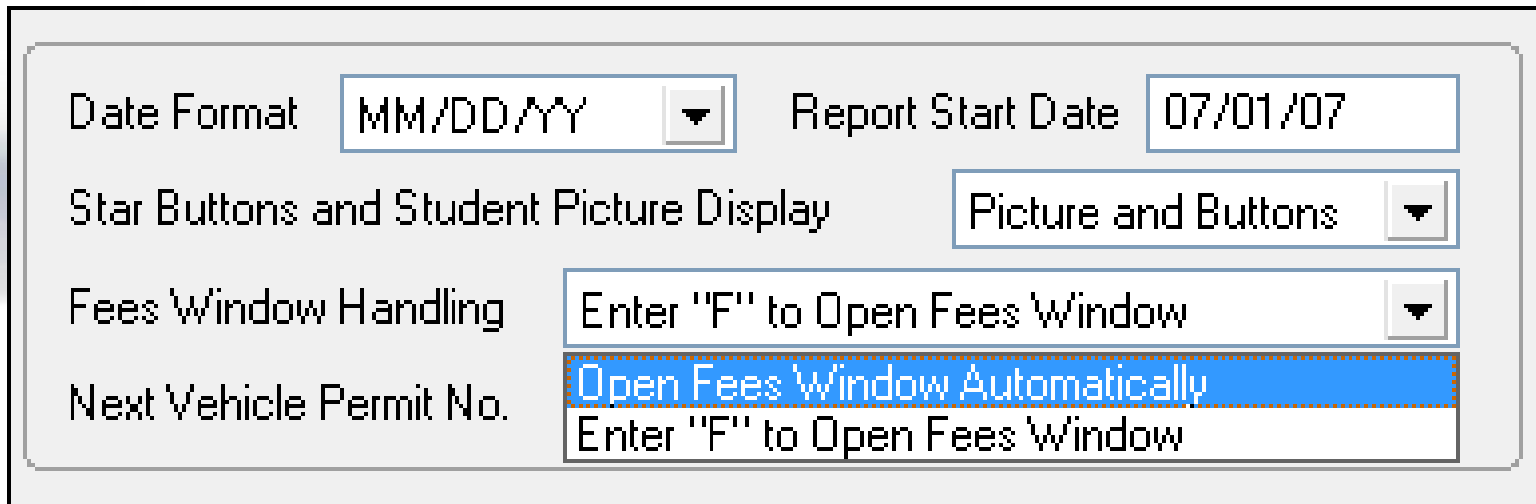
Immediate Actions

Import Schedule Data Now	<input checked="" type="checkbox"/>
Generate Fees Now	<input checked="" type="checkbox"/>



Fees On Work Screen

- Management / Customize / School Settings - Work Screen Tab
- Choose Automatically or enter <F> in the Command Line to see Fee Window.



Date Format Report Start Date

Star Buttons and Student Picture Display

Fees Window Handling

Next Vehicle Permit No.



Charging Fees - Work Screen

- Fees are in a separate Cust Fee file.
- You can Load, Waive, or Delete.

T Course Fees

Customer: 901253 Banu, Bella

Use your mouse and the Ctrl key to select the fee lines and your desired actions.
Click on Load, Waive or Delete to select the desired action for each line.
Make sure the lines you want to process are highlighted in blue before clicking Proceed.
Load=Load on Work Screen as is, Waive=Load with zero fee, Delete=Never see fee again.

Date	Course	Course Description	Item	Item Description	Amount	Action
08/17/06	4010	Biology I	LABBIO	Lab Fees Biology Class	57.00	Load
08/17/06	9009	Physical Education 9th	TOWEL	Towel Fee	15.00	Load

Select All Deselect All Load Waive Delete Proceed Cancel

Course Fees Worksheet

- Customer / Course Schedule / Utilities / Course Fees Worksheet
- Use this to make decisions about fees that should be charged or deleted.

Cruise, Tim		901249		Customer Purchase History / Open Fees / Schedule					
Item No.	Description from History	Receipt No.	Date	Qty	Price	Total	Amt Pd	Amt Due	
PROMD	Prom Double	0000180	10/05/06	1	80.00	80.00	80.00	0.00	
WRAP	Wrapping Paper Fundrais	0000120	08/17/06	8	40.00	320.00	320.00	0.00	
YRBK	YEARBOOK	0000169	08/18/06	1	50.00	50.00	50.00	0.00	
YRBK	YEARBOOK 05-24	0000200	10/05/06	1	90.00	90.00	90.00	0.00	
Total for Customer: Cruise, Tim				11		540.00	540.00	0.00	
Date	Item No.	Item Description	Course No.	Sem	Course Description	Amount			
8/17/2006	LABBIO	Lab Fees Biology Class	4010	S1	Biology I	57.00			
8/17/2006	TOWEL	Towel Fee	9009	S1	Physical Education 9th	15.00			
						72.00			
Class No.	Course Description	Term	Period	Teacher No.	Teacher Name	Room No.			
5090-001	French I	S1	4	1234	Marilyn Maxey	115			
2009-001	Algebra I	S1	2	4567	Ted Williams	250			



Convert Fees to Debts

- Customer / Course Schedule / Utilities / Convert Fees to Debts
- Convert Fees to Debts Journal and Update.

CONVERT COURSE FEES TO DEBTS JOURNAL

Customer

Course No.	Course Description	Item No.	Item Description	Amount
Customer Number/Name: 901253 - Banu, Bella				
4010	Biology I	LABBIO	Lab Fees Biology Class	57.00
9009	Physical Education 9th	TOWEL	Towel Fee	15.00
				<u>72.00</u>
Customer Number/Name: 901236 - Butler, Carla				
9009	Physical Education 9th	TOWEL	Towel Fee	15.00
				<u>15.00</u>



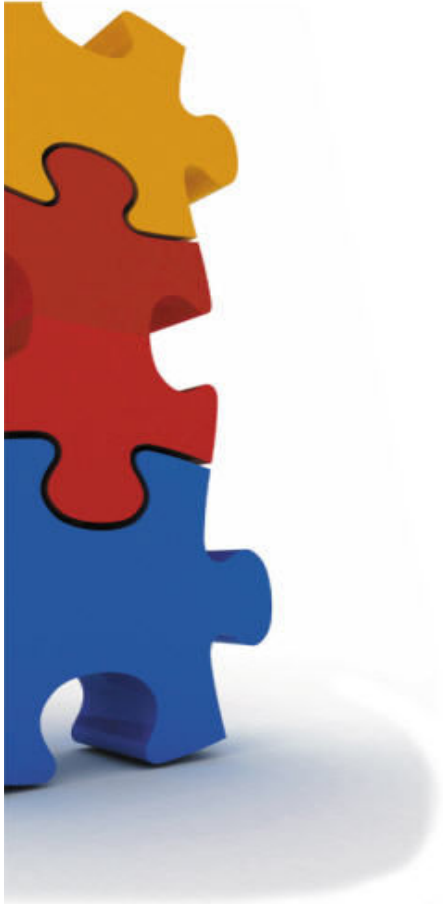
Payments On Account

- After Journal and Update of the Convert Course Fees to Debts, the Students' Debts will be charged to their accounts.
- Simply type "P" in the Command Line and access the Payment Screen and apply payment to the appropriate debt.

901238 - Boyd, Julian Amount Paid/Applied

Receipt	Date	Item No./Description	Amount	Due	Amount Paying	Agency
0000242	02/07/08	CHEM\WKBK/Chem Workbook	20.00	20.00	0.00	
0000243	02/07/08	FR\WKBK/French Workbook	20.00	20.00	0.00	
0000244	02/07/08	TOWEL/Towel Fee for P.E. Class	12.50	12.50	0.00	





Let's Walk Through It! Or Questions & Answers

