



Mass Fee Attribute

QUICK STEPS:

- Log on to Manager.
- Click the Misc tab and then Mass Fees.
- Select student and click add. Ctrl + click will allow you to choose several students at once.
- Click Next when list is complete.
- Now select the item to be billed from the drop down menu and click Add.
- Here is where you can add notes in the memo ie: 20-21 player fees, travel fees, etc.
- You can also choose a date for the fee to turn to a fine by clicking the auto fine box and selecting a date.
- Key in amount of the fee.
- Click Next and review before submitting. You can reduce fees from this screen for certain students if needed.
- Click submit and send email to Meg and Connie for approval and to post to student accounts.



Mass Fee Attribute

Abstract

Mass Fee is a function allowing a user to apply one or more fees to a group of students. A related function is *schedule processing* where InTouch builds fees due from InTouch items connected to courses.

A fee: (in this context) is a charge for some InTouch item generally related to an activity or class. The InTouch item can either be a generic or very specific item. The InTouch item will generally be on the web for payment and clearing schedule [fee] requirements.¹

Purpose

To make assessing single and multiple fees very efficient for the InTouch user

- Fast, Accurate and Efficient
- Correct pricing for free and reduced

Related Documents

Quick Note: Fees Assessed Management: Clearing, adjustment, terminal payment and web payment

Additional Documents Related to this Subject

- Item groups
- Customer [fee] groups
- Customer [discount] price level groups

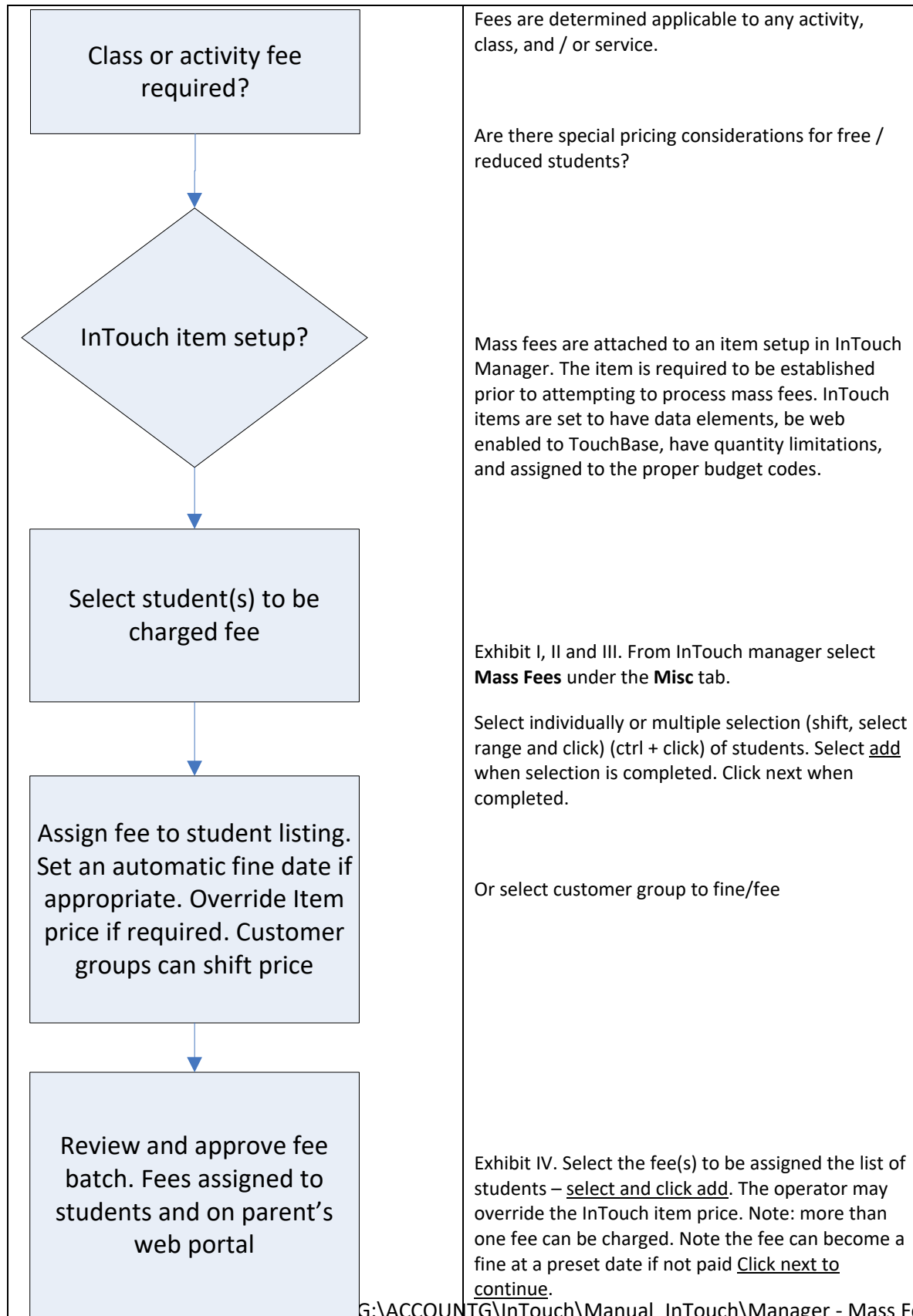
This document

- I. Processing Mass Fees
- II. Fee Processing Exhibits
- III. Fee reports: Terminal and Manager
- IV. Fee reports: TouchBase Staff Reports
- V. Recurring Fees

¹ A fee has other criteria such as if the fee is unpaid it can become an automatic fine at a preset date. Unpaid fees are covered with similar processing attributes as InTouch fines.



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II. Fee Processing Exhibits

Exhibit I – InTouch Manager – Misc Tab

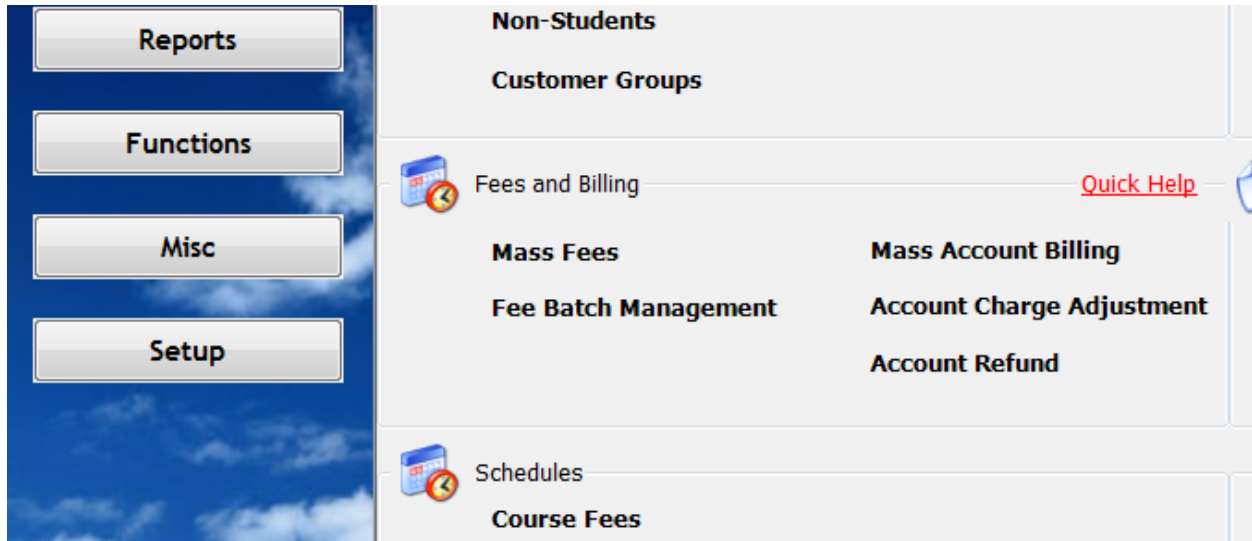
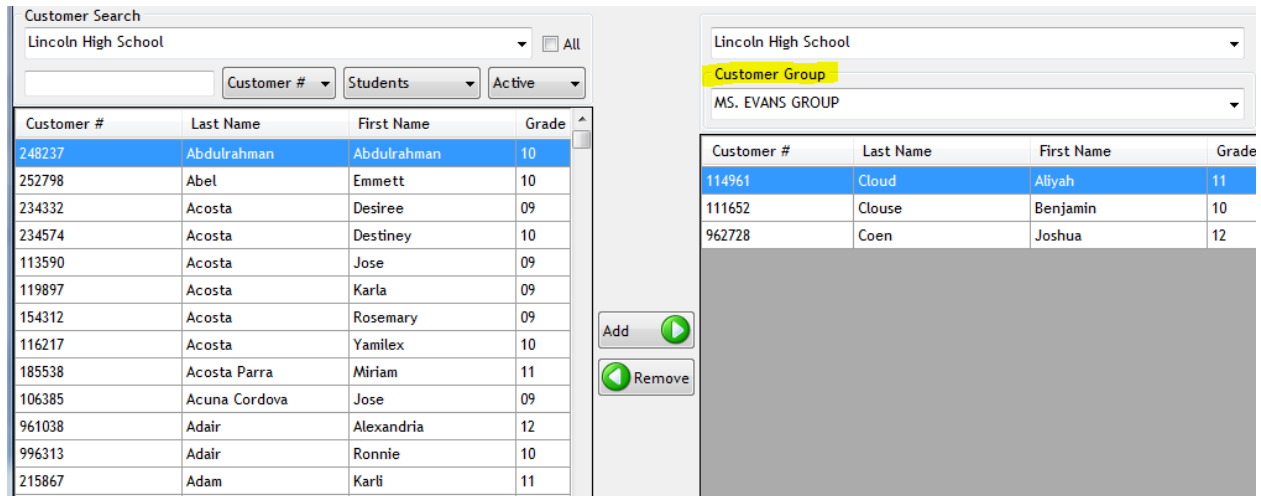


Exhibit II – Selecting students to assign class fees



The interface allows for the single selection of students or the use of customer groups. Customer groups are setup in the *Customer Groups* section.



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Exhibit III – Student selection (multiple)

The screenshot shows the 'InTouch Manager - Mass Fees' window. On the left, a 'Customer Search' section is set to 'Lincoln High School'. Below it is a table of students with columns for Customer #, Last Name, First Name, and Grade. Several rows are highlighted in blue. On the right, a 'Customer Group' section is set to 'MS. EVANS GROUP' and contains a smaller table of selected students. Below the tables are 'Add' and 'Remove' buttons.

Customer #	Last Name	First Name	Grade
248237	Abdulrahman	Abdulrahman	10
252798	Abel	Emmett	10
234332	Acosta	Desiree	09
234574	Acosta	Destiney	10
113590	Acosta	Jose	09
119897	Acosta	Karla	09
154312	Acosta	Rosemary	09
116217	Acosta	Yamilex	10
185538	Acosta Parra	Miriam	11
106385	Acuna Cordova	Jose	09
961038	Adair	Alexandria	12
996313	Adair	Ronnie	10
215867	Adam	Karli	11

Customer #	Last Name	First Name	Grade
114961	Cloud	Aliyah	11
111652	Clouse	Benjamin	10
962728	Coen	Joshua	12

Selection of additional students to be fee'd for this item. Select the student and click **ADD**.

This close-up shows the 'Customer Search' section with 'Lincoln High School' selected. The 'Grade' filter is set to '10', and the 'Students' and 'Active' filters are also visible. Below the filters is a table of students, with the first row highlighted in blue.

Customer #	Last Name	First Name	Grade
248237	Abdulrahman	Abdulrahman	10
252798	Abel	Emmett	10
234574	Acosta	Destiney	10
116217	Acosta	Yamilex	10
996313	Adair	Ronnie	10
15960	Adams	Brittley	10
73210	Adams	Haley	10
15765	Addington	Rachel	10
11644	Aguilar	Salena	10

Note the selection can be by grade – all 10th graders can be selected, for example.



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Exhibit IV – Attaching a fee to the list of students

The screenshot shows the 'InTouch Manager - Mass Fees' window. On the left, there is a list of items for 'Lincoln High School'. The item '3472-MBC/D AP-CALC-BC-DEPOSIT' is selected. Below this list are 'Add' and 'Remove' buttons. On the right, a detailed view of the selected item is shown in a table format.

Item #	Description	Memo	Auto Fine	Auto Fine Date	Amount
3472-MBC/D	AP-CALC-BC-DEPOSIT	Calculus 2012	<input checked="" type="checkbox"/>	6/24/2012	13.00

One or more items can be selected to fee this group. Here we selected the AP Calculus exam.

It is very beneficial to insert a memo and a **fine** date in the associated fields.C



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Exhibit V – Fee batch with price levels

InTouch Manager - Mass Fees

Batch Memo: Calculus AP Exam


Student ID	First Name	Last Name	Item #	Description	Memo	Auto Fine	Auto Fine Date	Price Level	Amount	Qty	Total
114961	Aliyah	Cloud	3472-MBC/D	AP-CALC-BC-DEP...	Calculus 2012	<input checked="" type="checkbox"/>	6/24/2012		13.00	1	13.00
111652	Benjamin	Clouse	3472-MBC/D	AP-CALC-BC-DEP...	Calculus 2012	<input checked="" type="checkbox"/>	6/24/2012		13.00	1	13.00
962728	Joshua	Coen	3472-MBC/D	AP-CALC-BC-DEP...	Calculus 2012	<input checked="" type="checkbox"/>	6/24/2012		13.00	1	13.00
961038	Alexandria	Adair	3472-MBC/D	AP-CALC-BC-DEP...	Calculus 2012	<input checked="" type="checkbox"/>	6/24/2012	Reduced	7.00	1	7.00
116217	Yamilex	Acosta	3472-MBC/D	AP-CALC-BC-DEP...	Calculus 2012	<input checked="" type="checkbox"/>	6/24/2012	Free	0.00	1	0.00
113590	Jose	Acosta	3472-MBC/D	AP-CALC-BC-DEP...	Calculus 2012	<input checked="" type="checkbox"/>	6/24/2012	Reduced	7.00	1	7.00
234332	Desiree	Acosta	3472-MBC/D	AP-CALC-BC-DEP...	Calculus 2012	<input checked="" type="checkbox"/>	6/24/2012		13.00	1	13.00

Exhibit VI – Batch Acceptance – Fee Batch Management

Functions

Misc

Setup

 Fees and Billing [Quick Help](#)

Mass Fees

Fee Batch Management

Mass Account Billing

Account Charge Adjustmen

Account Refund



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11/30/2011	master, a5555		
2/1/2012	master, a5555		
2/7/2012	master, a5555		
2/24/2012	master, a5555	Calculus AP Exam	

Fees								
Student ID	First Name	Last Name	Item #	Description	Total	Auto Fine	Auto Fine Date	Memo
114961	Aliyah	Cloud	3472-MBC/D	AP-CALC-BC-DEPOSIT	13.00	<input checked="" type="checkbox"/>	6/24/2012	Calculus 2012
111652	Benjamin	Clouse	3472-MBC/D	AP-CALC-BC-DEPOSIT	13.00	<input checked="" type="checkbox"/>	6/24/2012	Calculus 2012
962728	Joshua	Coen	3472-MBC/D	AP-CALC-BC-DEPOSIT	13.00	<input checked="" type="checkbox"/>	6/24/2012	Calculus 2012
961038	Alexandria	Adair	3472-MBC/D	AP-CALC-BC-DEPOSIT	7.00	<input checked="" type="checkbox"/>	6/24/2012	Calculus 2012
116217	Yamilex	Acosta	3472-MBC/D	AP-CALC-BC-DEPOSIT	0.00	<input checked="" type="checkbox"/>	6/24/2012	Calculus 2012
113590	Jose	Acosta	3472-MBC/D	AP-CALC-BC-DEPOSIT	7.00	<input checked="" type="checkbox"/>	6/24/2012	Calculus 2012
234332	Desiree	Acosta	3472-MBC/D	AP-CALC-BC-DEPOSIT	13.00	<input checked="" type="checkbox"/>	6/24/2012	Calculus 2012

Fee batches are accumulated and selected for processing. If the batch is acceptable, the APPROVE is selected.

III. Fee Reports: Terminal and Manager

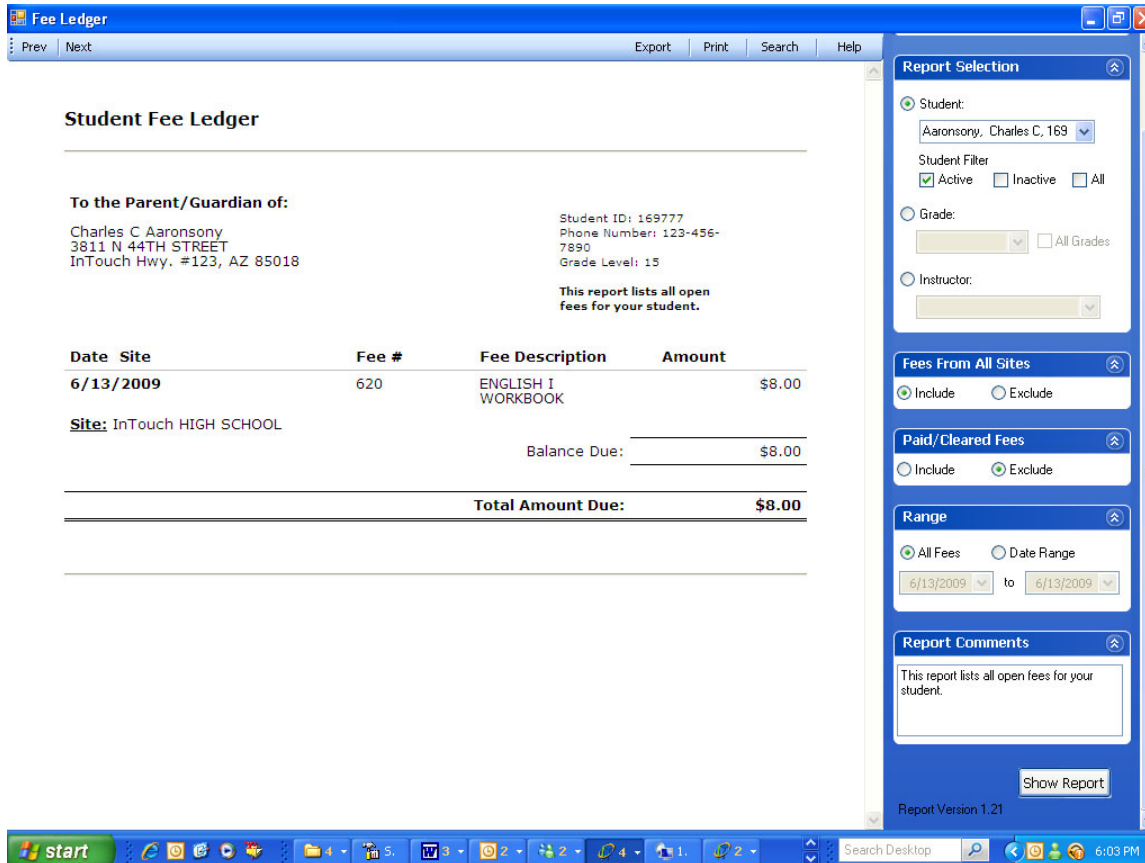
Terminal Report: Select student has TWO fines and ONE open fee.

Additionally, under **STUDENT HISTORY** is a complete record of payments, open fines and open fees.



Mass Fee Attribute

Fee Listing Report – InTouch Manager



Student Fee Ledger

To the Parent/Guardian of:
 Charles C Aaronsony
 3811 N 44TH STREET
 InTouch Hwy. #123, AZ 85018

Student ID: 169777
 Phone Number: 123-456-7890
 Grade Level: 15

This report lists all open fees for your student.

Date	Site	Fee #	Fee Description	Amount
6/13/2009		620	ENGLISH I WORKBOOK	\$8.00
Site: InTouch HIGH SCHOOL				
Balance Due:				\$8.00
Total Amount Due:				\$8.00

Report Version 1.21

IV. TouchBase Staff Reports

VI. Recurring Fees

Recurring fees are those which are consistent month-to-month or period to period. Retrieving a batch will take a moment and the rest of the process may be completed in a minute. An option will be available to save the batches for later retrieval:

1. build a standard mass fee batch as noted above
2. save the batch for later retrieval
3. at a later time, retrieve the batch – this will list out the students in the saved batch
4. assign an Item and a “fine/debt date” if applicable
5. process the batch as normal



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Batches will not be processed for inactive students/customers.

Fees may be setup, under this scenario, where each month has a fee (example: ADK-JAN, ADK-FEB...) which then will show on the customer's **open fee ledger** and then if these unpaid fees roll into fines/debts then displayed/retrieved on the **fine ledger**. Posted and reported on the web site for additional payment.

Addition of recurring billings will provide a fast and effective way of charging fees which convert to fines at a designated time. This attribute may replace a traditional invoicing / billing function as it is:

- easy
- fluent
- allows for management of open, unpaid items
- integrates for on line payments seamlessly
- integrates with the accounting system through the fiscal interface
- integrates with InTouch terminal seamlessly