

# Lesson #9 - Tuition Fees

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## Important: This lesson also includes...

two additional Lessons at the bottom of this Lesson (after QUIZ - Lesson #9).

This lesson (Lesson #9) provides an overview on Tuition Fees followed by a lesson (Lesson #9.1) on posting Tuition Fees specifically for classes with the Billing Method of By Class Fee and a lesson (Lesson #9.2) for classes with the Billing Method of By Total Hours. You can access them here as well.

**Lesson #9.1 -  
Post Tuition for  
Classes with By  
Class Fee Billing  
Method**

**Lesson #9.2 -  
Post Tuition for  
Classes with By  
Total Hours  
Billing Method**

## Posting Tuition Fees



Permissions control the ability of your Users to see certain data and take specific actions. Before moving forward review [User Permissions for Posting Tuition Fees](#).

Tuition fees, the lifeblood of your business. More often than not, tuition fees require adjustments before they are posted to an account. Jackrabbit makes it easy for you, we do all the math and make the adjustments automatically!

It's important to answer these questions before you make decisions on where and how to post your tuition fees:






- ★ **Tuition Settings** - How often will you post tuition fees (*Billing Cycle*)? Will you charge tuition based on the cost per class (*By Class Fee*) or based on the number of hours of class instruction (*By Total Hours*)? [Learn how to define and set your tuition settings](#)
- ★ **Discounting** - Do you offer discounts for multiple students in a family taking classes, students who take multiple classes, or other types of discounts? [Learn about discounting tuition fees](#)
- ★ **Prorating** - Do you prorate tuition fees for students who enroll after a billing cycle has started,

when your facility is closed, when a class meets more than the standard number of times in a month (4)? [Learn about prorating tuition fees](#)

★ **Fixed Fees** - Do you have students or families with special tuition arrangements? Student Fixed Fees and Family Fixed Fees allow you to override all tuition posting calculations and just post a set amount per billing period. [Learn about Fixed Fees](#).

## Ready? Set? Post Those Tuition Fees!

There are many ways to post tuition fees in Jackrabbit. This section was designed to help you understand your options and provide you with information and step-by-step instructions.

	<b>The Post Tuition Fees Feature - Your #1 Tool for Tuition Posting</b>	Post tuition fees to one family, one class, or to multiple families at one time with <b>Post Tuition Fees</b> from the <i>Transactions</i> menu. Post the fees on the spot or schedule them to post later.
	<b>Post Tuition During Enrollment in Jackrabbit</b>	When you are enrolling students into classes directly into Jackrabbit, you can choose to post tuition as part of the process.
	<b>Post Tuition During Online Registration</b>	You can select your Online Registration settings so that tuition is posted automatically for class enrollments.
	<b>Post Tuition with Parent Portal Enrollments</b>	When parents enroll students in classes in the Parent Portal, you can set whether or not you want the tuition fees posted.
	<b>Post Tuition using Make Sale/Post Fees</b>	Tuition fees can be posted to an individual family, but discounting and prorating are not automatically applied.






Review recently posted tuition fees using [Recent Transactions > Tuition Fees](#) under the *Transactions* menu.



## Tuition Settings

*Billing Cycles? Tuition Discounts? Discount Rules?* There are several decisions you need to make when you are ready to set up your tuition settings and related rules and options. All these settings impact how Jackrabbit bills your families.

- ★ **Initial Setup** - Go to the *Gear (icon) > Settings > General > Tuition Settings (left menu)*, to start the Setup Wizard which will guide you through the initial setup of your Tuition Billing Settings, Discount Rules, Discount Settings, Prorating Options, and Tuition Fee Settings. **Note:** You can choose to complete the wizard or skip it and step through the settings on your own. Once completed, or if you choose to skip it, the Wizard is no longer an option.
- ★ **Update Tuition Settings** - Go to the *Gear (icon) > Settings > Tuition & Discounting* for quick access to update your tuition settings whenever needed.

Use the links below to learn more about each section of tuition settings:

	<p><b>Tuition Billing Settings</b></p>	<p>How do you bill (post tuition fees)? <a href="#">Learn more about Tuition Billing Methods.</a></p> <p>How often do you bill? <a href="#">Learn more about Tuition Billing Cycles.</a></p>
	<p><b>Discount Rules</b> (Classes Billed by Class Tuition Fee)</p>	<p>Tuition Discount Rules define multi-class and/or multi-student discounts and can be assigned to classes or to families. <a href="#">Learn more about Discount Rules</a></p>
	<p><b>Discount Settings</b> (Classes Billed by Total Hours)</p>	<p>For classes that use the Billing Method of By Total Hours and post hours per student, you may offer multi-student discounts. <a href="#">Learn more about Discount Settings.</a></p>

	<b>Prorating Options</b>	When a student enrolls after a Billing Cycle has started, Jackrabbit will determine how many classes are left in the Billing Cycle and prorate accordingly. <a href="#">Learn more about Prorating Tuition Fees.</a>
	<b>Tuition Fee Settings</b>	Manage how and when tuition fees are posted to your customer accounts. <a href="#">Learn more about Tuition Fee Settings.</a>

## Tuition Billing Methods

Jackrabbit provides you with two billing methods for how classes are billed to your students **By Class Fee** and **By Total Hours**.

Each class is assigned a Billing Method which is used to group classes for billing when you [Post Tuition Fees to Multiple Families with the Post Tuition Fees Function](#). Billing Methods also control how your classes are **discounted**.

## By Class Fee

Tuition is posted using the amount defined in the *Tuition Fee* field on the *Summary* tab of the *Class* record.

### Class: Hip Hop L2 - Thurs 7pm

← RETURN   **SAVE CHANGES**   **DELETE**

Class Roll   Email/Text Class   Enter Absences   Absence/Attendance   Post Class Transactions   Copy Class   Mass Drop   Sizes/Measurements

**Summary**   Enroll List   Drop List   Absences   Makeups   Wait List   Instructors   Lesson Plan   Skills/Levels

Class Name: Hip Hop L2 - Thurs 7pm   Status: Active

Location: EDU   Room: Floor C

Session: Winter 2019

Class Start Date: 12/1/2019   End Date: 2/28/2020   Registration Start Date: 9/1/2019

Days: Mon Tue Wed Thu Fri Sat Sun

Start Time: 07:00pm   End Time: 07:45pm   Duration: :45

**Tuition Fee: 67.50**   Per-Day: No

Tuition Billing Method: By Class Fee   Exclude from Multi-Class Discount

Tuition Billing Cycle: Monthly

Tuition Discount Rule: Rec Classes   Edit Rule

Prorate Tuition

## By Total Hours

Post tuition based on the *Tuition Fee* assigned on the *Summary* tab of the *Class* record in conjunction with a Fee Schedule you create to define discounts for multiple hours of instruction. [Learn more about the Fee Schedule.](#)

### Class: Ballet L1 - Tues 6pm

← RETURN   **SAVE CHANGES**   **DELETE**

Class Roll   Enroll Student   Email/Text Class   Enter Absences   Absence/Attendance   Post Class Transactions   Copy Class   Mass Drop   Sizes/Measurements   Archive Class

**Summary**   Enroll List   Drop List   Absences   Makeups   Wait List   Instructors   Lesson Plan   Skills/Levels   Misc   Costumes

Class Name: Ballet L1 - Tues 6pm   Status: Active

Location: EDU   Room: Studio B

Session: Winter 2019

Class Start Date: 12/1/2019   End Date: 2/28/2020   Registration Start Date: 9/1/2019

Days: Mon Tue Wed Thu Fri Sat Sun

Start Time: 06:00pm   End Time: 06:30pm   **Duration: :30**

**Tuition Fee: 45.00**   Per-Day: No

Tuition Billing Method: By Total Hours   Exclude from Total Hours Count

Tuition Billing Cycle: Monthly

Prorate Tuition

Total Hours Fee Schedule

	Total Hours	Tuition Fee
1	0.50	45.00
2	0.75	67.50
3	1.00	85.00
4	1.25	105.00
5	1.50	120.00
6	1.75	140.00
7	2.00	160.00

## Important to Note

- The Tuition Billing Method is assigned for each class on the *Summary* tab of the *Class* record. Each class can have only one Billing Method, however, you can use both Billing Methods and assign them to different classes. For example, you may offer recreation classes that are billed by an assigned class fee at the same time as having competitive Team classes that are billed based on the total number of hours in class.
- If you select only one Billing Method for your Tuition Settings, Jackrabbit will assign that method to all existing and future classes and will hide the Tuition Billing Method field on the Class Summary tab.
- If you opt to use both methods, be sure that each *Class* record has a billing method assigned on the *Summary* tab. Classes that do not have a Billing Method assigned will NOT be pulled into tuition posting.

**TIP:** Use **Edit All Classes** from the *Classes* menu with the Search Criteria *Tuition Billing Method* set to = (No Method Specified) to easily locate all classes that don't have a Billing Method assigned and be able to quickly edit them all from one screen.

# Tuition Billing Cycles

A **Billing Cycle** is defined by how often you bill tuition to your students.

Go to **Tuition Billing Settings**, found under the *Gear (icon) > Settings > Tuition & Discounting > Tuition Billing Settings > Manage Billing Settings (button)*, to select all the **Billing Cycles** that apply to your organization. **Note:** If you bill **By Total Hours** you are limited to one Billing Cycle.

There are four Billing Cycles to choose from:

- **Weekly** - You can pick the day of the week that the cycle starts.
- **Monthly** - You can pick the day of the month the cycle starts.
- **By Session Dates** - You pick the Session dates, to use this option you must add start and end dates to each session. Session dates are added in the drop-down lists (*Gear icon > Settings > General > Drop-down Lists*).
- **Custom** - You can post fees using a custom Billing Cycle (for example, every 4 weeks), select *Custom*. Indicate the number of weeks in the Billing Cycle (you can select up to 52) and indicate the start date of the first Custom Billing Cycle.

Assigned to each *Class* record, on the *Summary* tab, Tuition Billing Cycles tell Jackrabbit how often families are billed for tuition for each class and what day/date the Billing Cycle starts. This is the day/date that the class cycle starts and **is not necessarily the date you actually post the tuition fees**. For example, you may post fees to families on the 25th of each month for the upcoming month. Your Billing Cycle would be monthly and each cycle would start on the 1st of the month.



Tuition Billing Cycles define the range of days that families are billed for. If you choose to **prorate tuition fees**, you must select a billing cycle.

## Select the Right Billing Method



Classes Billed by Total Hours



Billing Cycles for Classes Billed by Class Tuition Fee



Billing Cycle Examples

## Discount Tuition Fees

There are several types of discounts you can apply when posting tuition fees in Jackrabbit. The type of discount available depends on the **Billing Method** used.

<b>Multi-Class Discount</b> (Billing Method By Class Fee)	<ul style="list-style-type: none"><li>• Offered to students who take multiple classes. <a href="#">Learn more about Multi-Class Discounts.</a></li><li>• Defined using <b>Discount Rules</b> that are added to the classes you want to discount. <a href="#">Learn more about Discount Rules</a></li></ul>
<b>Hours Discount</b> (Billing Method By Total Hours)	<ul style="list-style-type: none"><li>• Offered to students based on the number of hours they are in classes as outlined in your Fee Schedule. <a href="#">Learn more about Hours Discounts.</a></li><li>• Defined in the <b>Discount Settings</b>. <a href="#">Learn more about Discount Settings.</a></li></ul>
<b>Multi-Student Discount</b> (Both Billing Methods)	<ul style="list-style-type: none"><li>• Offered to families who have multiple students taking classes. <a href="#">Learn more about Multi-Student Discounts</a></li><li>• Defined in the Discount Rules and Discount Settings.</li></ul>
<b>Family Discount</b> (Both Billing Methods)	<ul style="list-style-type: none"><li>• Offered to specific families for things like military discounts, staff discounts, etc. <a href="#">Learn more about Family Discounts</a></li><li>• Defined in the <i>Family</i> record, on the <i>Billing Info</i> tab.</li></ul>
<b>Additional Discounts</b> (Both Billing Methods)	<ul style="list-style-type: none"><li>• Offered to families when using the Post Tuition Fees function that are applied on top of all other discounts. <a href="#">Learn more about Additional Discounts.</a></li><li>• Defined in the Post Tuition Fees process with each batch created.</li></ul>

# Prorate Tuition Fees

Jackrabbit offers the ability to automatically prorate tuition fees for the following situations:

- Students who enroll after a Billing Cycle has started.
- Students who have a future drop scheduled before the end of a Billing Cycle.
- Classes fall on a day your facility is closed (Closed Date).
- Classes that meet more than the standard number of times (4) in a month (for By Class Fee Billing Method classes only).



Prorating can be 'turned off' for individual classes in the *Class* record on the *Summary* tab, allowing you to prorate some classes while not prorating others.

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## Prorating Options (Settings)

From the *Gear (icon)* > *Settings* > *Tuition & Discounting* > *Prorating Options* > *Manage Options (button)*, the following settings control how Jackrabbit prorates tuition.

**Note:** Jackrabbit considers a month to be four weeks. For a class that meets once a week, the standard number of classes for that week is four. For classes that meet twice a week, the standard number of classes for that month would be eight.

Setting	Example	Yes or No?
Do you prorate (post partial tuition)?	<ul style="list-style-type: none"><li>• Your Billing Cycle is monthly (Jackrabbit considers a month as 4 weeks).</li><li>• Class meets once per week.</li><li>• A student enrolls in the class in the middle of the cycle and will only attend 2 of the 4 classes.</li></ul>	Answer <b>Yes</b> if you want Jackrabbit to prorate the tuition fees, posting only 1/2 of the full month's tuition fee.
		Answer <b>No</b> if you want Jackrabbit to disregard the enrollment date and post the full month's tuition fee.



<p><b>Do you prorate tuition when a class lands on a Closed Date?</b></p>	<ul style="list-style-type: none"> <li>• Your Billing Cycle is monthly.</li> <li>• Class meets once per week.</li> <li>• Your facility is closed on one of the class meeting dates during the month.</li> </ul> <p><b>TIP:</b> You can exclude a Closed Date for prorating. From the <i>Gear (icon) &gt; Settings &gt; General &gt; Closed Dates (left menu)</i> edit the Closed Date you want to omit and clear the <i>Prorate Tuition</i> checkbox.</p>	<p>Answer <b>Yes</b> if you want Jackrabbit to prorate the fees using the per class rate to determine how much to reduce the month's tuition fee. The per class rate is calculated using the Tuition Fee from the <i>Summary</i> tab of the <i>Class</i> record.</p> <hr/> <p>Answer <b>No</b> if you want Jackrabbit to disregard the Closed Date and post the full month's tuition fee.</p>
<p><b>When tuition is prorated, do you also prorate the discounts (multi-class, multi-student, family discount)?</b></p>	<ul style="list-style-type: none"> <li>• A family has one student taking classes.</li> <li>• Halfway through the month, they enroll a second student into a class with a tuition fee of \$100, which meets once per week.</li> <li>• The tuition for the second student is prorated to account for them only attending 1/2 of the classes in the month and the fee is posted as \$50 (<math>\\$100 / 4</math> classes in the month = \$25 per class x 2 classes attended).</li> <li>• You offer a \$5 discount for the second student in a family.</li> </ul>	<p>Answer <b>Yes</b> to have Jackrabbit prorate the discount. The \$5.00 multi-student discount is divided by the 4 classes in the month to get a per class proration rate of \$1.25. Since the student will be eligible to attend 2 classes in the month, the proration is calculated to \$2.50 (<math>\\$1.25 \times 2</math>). The tuition fee would post as \$47.50 (<math>\\$50 - \\$2.50</math>).</p> <hr/> <p>Answer <b>No</b> to have Jackrabbit apply the full \$5 discount to the prorated tuition fee for the second student. The tuition fee would post as \$45 (<math>\\$50 - \\$5</math>).</p>
<p><b>When using the Billing Method of By Class Fee, do you charge extra when a class meets more than the standard number of days in a monthly Billing Cycle?</b></p>	<ul style="list-style-type: none"> <li>• Your Billing Cycle is monthly.</li> <li>• Class meets on Mondays and the current Billing Cycle has five Mondays.</li> <li>• The tuition fee for the class is \$100.</li> </ul>	<p>Answer <b>Yes</b> to have Jackrabbit charge an additional fee to account for the extra class meeting date. The per class rate is \$25 (<math>\\$100 / 4</math>). The prorated tuition fee would be posted as \$125 (<math>\\$25 \times 5</math>).</p>

		Answer <b>No</b> to have Jackrabbit disregard the extra class meeting date and charge the monthly tuition fee of \$100.
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To calculate prorated tuition, each class must have the following information on the *Summary* tab of the *Class* record: Class Start and End dates (if you bill by Session, prorating uses the start/end date of the Session found under the Gear menu > Settings > Drop-down Lists left menu > Class > Session); a **Tuition Billing Method**; a **Tuition Billing Cycle**; a **Tuition Discount Rule** when *Tuition Billing Method* = *By Class Fee*; the *Prorate Tuition* checkbox selected.

## Student & Family Fixed Fees - Tuition

Jackrabbit gives you an option to create Fixed Fees to use when the tuition fee assigned to a class is not appropriate for a family or a specific student. These situations are considered unique or unusual and Fixed Fees should only be used under specific circumstances.

### ☑ Business Scenario

## Family Discount (Billing Info Tab)

When you use Post Tuition Fees (from the *Transactions* menu), you can have a Family Discount applied to the tuition fees. This is often used for volunteers, staff, etc. that are given a discount over and above any **multi-class** or **multi-student** discounts that you offer.

The Family Discount, which can be a dollar amount or a percentage, is applied to the tuition amount **after** your other discounts have been calculated and applied.

## Family: Ager

← RETURN   SAVE CHANGES   DELETE

Make Sale/Post Fees   Payment   Refund   Statement   Add Student   Add Contact   Archive Family   Family Name   Email   Push Notification   Email Schedules   Merge Family

Summary   Contacts   Classes   Events   Transactions   **Billing Info**   Misc   Notes (0)

Billing Delivery    Membership Type ClubMemb   Billing Contact Holly Ager  
ePayment Method Credit Card   ePayment Schedule AutoPay   Address 2016 Hummingbird Cresent  
Huntersville, NC 28078  
Email hollyager41@gmail.com


Discounts and Fixed Fees (only applied when using Post Tuition Fees and Post Tuition Fees by Total Hours)

Family Discount Rule	<input type="text"/>				
Family Discount	10	Discount Type	Percent	Exp Date	12/31/2020
				Note	Military family
Family Fixed Fee	<input type="text"/>	Fixed Fee Category1	<input type="text"/>	Exp Date	mm/dd/yyyy
				Note	<input type="text"/>

## Add or Update a Discount to an Individual Family

1. Select the **Billing Info** tab in the *Family* record.
2. Enter a discount in the **Family Discount** field (the discount can be an amount or a percentage).
3. Select the **Discount Type** (Amount or Percentage).
4. Assign an Exp Date (optional).
5. Add a **Note** (optional).
6. Click **Save Changes**.

## Add or Update a Discount for a Group of Families

1. Go to the **Families** (menu) > **All Families** and filter as needed.
2. Select all the families in the grid by leaving the 1st column checkboxes blank or check the 1st column checkboxes for the families you would like to update in a group.
3. Click the **More** (icon)  > **Family Discount**.
4. Enter **Amount**, **Expires** (optional expiration date), and select the **Discount Type** from the drop-down list. Use the toggle to remove any family discounts.
5. Click **Update**. All selected families will have their Family Discount updated.

## Important to Note

- Family Discounts **are not** deducted from Family Fixed Fees.
- Family Discounts **are** deducted from Student Fixed Fees. The discount is posted after all Student Fixed Fees are entered. Example: A family has two students and both students have a Fixed Fee of \$100. The Family Discount is \$10.00. Both Student Fixed Fees are posted at \$100 each. The discount of \$10 is subtracted from the total ( $\$100 + \$100 - \$10 = \$190$ ).
- Family Discounts are **only** applied when using **Post Tuition Fees** from the *Transactions* menu. Parent Portal enrollments and enrollments done from within Jackrabbit do not include the Family Discount.
- You can set the Family Discount to expire on a specified date. After an expiration date has passed, the discount will be ignored when posting tuition fees.

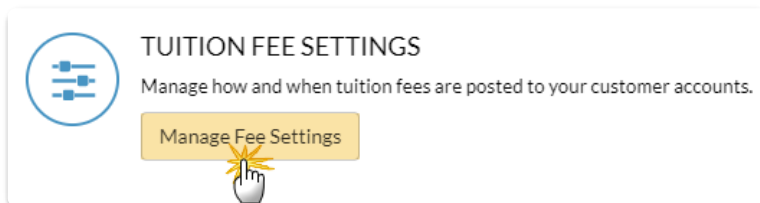
# Tuition Fee Settings

Tuition Fee Settings tell Jackrabbit how you want to post tuition when a student is enrolled:

- From within Jackrabbit (Quick Registration form, Enroll buttons, and Enroll links)
- During Online Registration
- In the Parent Portal

**Note:** Tuition will NOT post for any class that is missing a *Billing Method*, a *Billing Cycle*, and/or a *class start date*. Jackrabbit requires this information to properly calculate tuition. Use *Classes (menu) > Edit All Classes* to research classes that may be missing these fields.

To edit your Tuition Fee Settings go to the **Gear (icon) > Settings > Tuition & Discounting > Tuition Fees Settings > Manage Fee Settings** (button).



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☑ By Class Fee Settings

Expand/Collapse All

☑ By Total Hours Settings



No tuition will post when a parent enrolls students in the Parent Portal if the family has a current **Family Fixed Fee** or a current **Student Fixed Fee**. Your organization will receive an email notification that there is a parent portal enrollment for a family with a Fixed Fee in place that may need to be updated. Tuition fees must then be posted manually.

## Post Tuition Fees During Online Registration



Permissions control the ability for your Users to see certain data and take specific actions. Before moving forward review [User Permissions for Posting Tuition Fees](#).

When your organization is using [Online Registration](#) or [Class Listings Tables](#) on your website to accept new registrations and class enrollments, you have the option to automatically post the tuition fees for those classes to the family's account.

The fees posted will include any [discounts](#) or [prorating](#) you offer based on your Tuition Settings. The calculation also takes into consideration any existing enrollments in the family record, and will use that information when applying multi-class and multi-student discounts.

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## Required Settings

The following settings must be defined before you can post tuition fees with online registrations.

Go to the **Gear** (icon) > **Settings** > **Online Registration** > **Settings** (left menu):

- Allow or require class enrollment when registering using the Online Registration form.
- Show the 'Register' links in your Class Listings Tables.

Go to the **Gear** (icon) > **Settings** > **Tuition & Discounting** > [Tuition Fee Settings](#) > **Manage Fee Settings**:

- Manage how and when tuition fees are posted.

## How it Works

Once the new family has finished adding their information and selecting all of the classes they want to enroll their students in, they will submit the registration. At that time, Jackrabbit calculates the fees and posts them to the family's new account.

The family will see an on-screen confirmation of their registration.



If you are using the [Parent Portal](#), you can include a *Go To Parent Portal* button to allow them to access their portals immediately.

An email confirmation is also sent to the family with details of their class enrollments and a listing of the tuition fees (and registration fees if you opt to automatically post them). Any discounts or prorating applied to the tuition is displayed.

The image shows two screenshots. The left screenshot is a confirmation page with the Jackrabbit logo and the text "Registration Confirmed". It includes a green message box: "Thank you for registering! You will receive an email confirmation with your registration details shortly." and a blue button labeled "GO TO PARENT PORTAL". An arrow points to the right screenshot, which is titled "Jackrabbit Help Center - Class Registration". It contains a link to access the portal, the family name "Wallace", and a table of fees.

Type	Student	Class	Orig Amt	Discount	Amount
Registration			35.00		35.00
Tuition Fee	Georgia Wallace	Tumbling L3 - Wed 7pm	85.00	0.00	85.00
Tuition Fee	Georgia Wallace	Youth Ninja Parkour	85.00	2.00	83.00
Tuition Fee	Olivia Wallace	Tumbling L2 - Mon 6pm	67.50	5.00	62.50
			<b>Total:</b>		<b>265.50</b>

In Jackrabbit, the *Transactions* tab of the *Family* record now includes the tuition fees posted during the registration.

**Family: Wallace**

← RETURN   **SAVE CHANGES**   **DELETE**

Make Sale/Post Fees   Payment   Refund   Statement   Add Student   Add Contact   Archive Family   Family Name   Email   Push Notification   Email Schedules

Summary   Contacts   Classes   Events   **Transactions**   Billing Info   Misc   Notes (0)   Files (0)

View Transaction History   View Unapplied Credits & Unpaid Fees

Current Balance **265.50**   Legend    FEE/CHARGE    PAYMENT/CREDIT    UNPAID FEE    UNAPPLIED CREDIT

			Date	Type	Orig Amt	Disc Amt	Amt	Unpaid Amt	Balance	Note	Cat1	Student	Class/Event	User
			3/6/2020	Registration	35.00		35.00	35.00	265.50		Registration Fee			Online
			3/6/2020	Tuition Fee	85.00	2.00	83.00	83.00	230.50	March, Multi-Class Disc=2.00	Gymnastics	Georgia Wallace	Youth Ninja Parkour	Online
			3/6/2020	Tuition Fee	85.00		85.00	85.00	147.50	March	Gymnastics	Georgia Wallace	Tumbling L3 - Wed 7pm	Online
			3/6/2020	Tuition Fee	67.50	5.00	62.50	62.50	62.50	March, Multi-Student Disc=5.00	Gymnastics	Olivia Wallace	Tumbling L2 - Mon 6pm	Online

## Post Tuition Fees with Parent Portal Enrollments



Permissions control the ability of your Users to see certain data and take specific actions. Before moving forward review [User Permissions for Posting Tuition Fees](#).

When your organization is using the [Parent Portal](#), and you allow parents to enroll their children in classes through their portal, you have the option to automatically post the tuition fees for those classes to the family's account.

The fees posted will include any [discounts](#) or [prorating](#) you offer based on your Tuition Settings. The calculation also takes into consideration any existing enrollments in the family record and will use that information when applying multi-class and multi-student discounts.



With portal enrollments, no tuition fees will be posted to families with a current [Family Fixed Fee](#) or [Student Fixed Fee](#). The parent is notified that your staff will be reviewing the account and your organization receives a confirmation that advises that a Fixed Fee may need to be updated.

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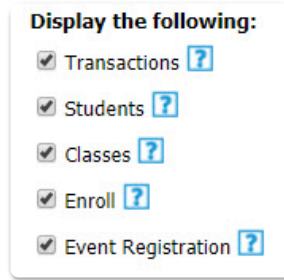
## Required Settings

There are several settings (Parent Portal and tuition) that must be defined before you can post tuition fees with Parent Portal enrollments. From the *Gear (icon) > Settings > Parent Portal > Settings (tab)*:

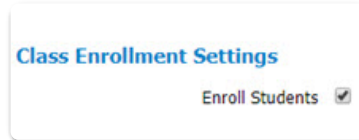
- Activate the Parent Portal

Activate Portal

- Display classes and enrollment options

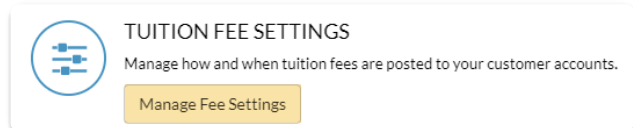


- Allow parents to enroll students



From the *Gear (menu)* > *Settings* > *Tuition & Discounting* > **Tuition Fee Settings** > *Manage Fee Settings* (button)

- Manage how and when tuition fees are posted

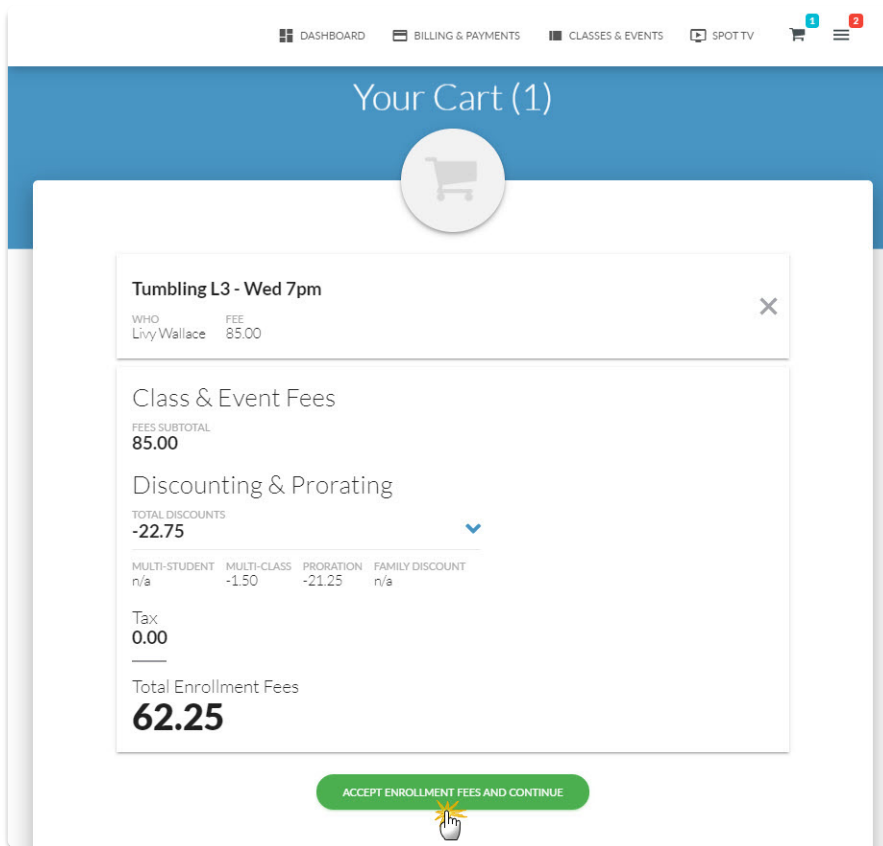


## How it Works

Once a parent has finished selecting all classes to **enroll their students** in and has clicked *Checkout Now*, Jackrabbit will calculate the tuition fees.

The parent is then taken to the *Your Cart* page where they are able to review the fees that will be posted to their account.





In the example shown above Livy was enrolled in Tumbling L3 through the Parent Portal. She is currently enrolled in another class, therefore a multi-class discount was applied to the tuition fee for Tumbling L3 (her second class). The fee was also prorated because Livy was enrolled in the tumbling class partway through the Billing Cycle.

When the parent accepts the fees, they will see a screen confirmation. The family's account is instantly updated and the tuition fees for the enrollment are visible in the portal and in Jackrabbit.

☑ Fees in the Parent Portal

☑ Fees in the Family Record

## Post Tuition to Multiple Families with the Post Tuition Fees Function

**Post Tuition Fees**, located under the *Transactions* menu, is a powerful tool that allows you to post tuition fees to more than one family at a time. It can also be used to post tuition to a single family or to a specific class.

The tuition fees can be posted immediately (**Post Now**) or scheduled to post at a future date and time (**Post Later**).

The flexibility of the Post Tuition Fees feature makes it an essential tool for posting tuition!

- ★ Jackrabbit does the heavy lifting and calculates all discounting and prorating according to your [Tuition Settings](#).
- ★ Prevent tuition fee posting errors with Jackrabbit's [Advanced Detection](#).
- ★ Automate! Schedule the posting of your tuition fees. Learn more about [Automated Tuition Fee Posting](#).



Permissions control a User's ability to view certain data or perform certain actions. Before moving forward review [User Permissions - Post Tuition Fees to Multiple Families at Once](#)

---

## The Post Tuition Fees Process

The Post Tuition Fees feature can be used to post to classes with either [Tuition Billing Method](#) (By Class Fee or By Total Hours).

Some settings are different between the two methods, but the process is the same (learn about each setting/criteria below):

1. Use the **Post Setting** to determine whether you want to post fees now or post fees later.
2. Select your **Billing Settings** (Billing Method, Billing Cycle, and Tuition Posting Date).
3. Choose your **Class Criteria**, **Family Criteria**, **Multi-Student Discount Settings** (By Total Hours only), and **Additional Settings**. Add **Transaction Details** and define any **Additional Discount** you may want to apply to the posting.
4. Set your preferences for **Advanced Detection**.
5. Preview the tuition fees and make any changes needed. Learn more about the [Preview Tuition Fees page](#).
6. **Post Now** or **Post Later** based on the *Post Setting* you selected in Step 1.



Before using Post Tuition Fees, you must first review and define your [Tuition Settings](#) to tell Jackrabbit what discounts and/or prorating apply to the fees.

---

# Post Tuition Fees Settings & Criteria Explained

Expand each section to learn more about the settings and criteria involved in the Post Tuition Fees process.

- ⌵ [Post Setting](#)
- ⌵ [Billing Settings](#)
- ⌵ [Class Criteria](#)
- ⌵ [Family Criteria](#)
- ⌵ [Multi-Student Discount Settings](#)
- ⌵ [Additional Settings](#)
- ⌵ [Transaction Details](#)
- ⌵ [Additional Discount](#)
- ⌵ [Advanced Detection](#)
- ⌵ [Frequently Asked Questions](#)

[Expand/Collapse All](#)

## Automatically Omit a Family Tuition or ePay

Do you have families with special tuition or ePayment arrangements that you don't want to post tuition to or collect ePayments from?

On the *Billing Info* tab of the *Family* record, you can use the **Omit Family** settings to choose whether to automatically exclude the family from tuition fees posted using **Post Tuition Fees** (*Transactions* menu) or from ePayments collected using **Process ePayments** (*Transactions* menu).

- ★ The Omit Family setting allows you to utilize automation and schedule tasks **Post Later/Process Later** because the family is automatically excluded; there is no need to select the checkbox manually, which can't be done with scheduled tasks.
- ★ When opting to Post Now/Process Now, the Omit Family setting reduces errors by eliminating the need to remember which families should be excluded and manually selecting a checkbox to omit them.



Permissions control the ability of your Users to see certain data and take specific actions. Before moving forward review [User Permissions for the Omit Family Setting](#)

**Family: Devon**

Make Sale/Post Fees | Payment/Credit | Refund | Statement | Add Student | Add Contact | Archive Family | Family Name | Email | Email Schedules | Submit Absences | Merge Family

Summary | Contacts | Classes | Events | Transactions | **Billing Info** | Misc | Notes (0) | Resources (0) | Policies (0)

Billing Delivery: [?] | Membership Type: [?] | Billing Contact: [Audrey Devon](#)  
ePayment Method: Credit Card | ePayment Schedule: [?]  
Address: 336 Hammond Road, Huntersville, NC 28078  
Email: [audrey@email.com](mailto:audrey@email.com)

**Omit Family**

Omit Family from Transactions > Post Tuition Fees | Note:   
 Omit Family from Transactions > Process ePayments | Note:

When the setting checkboxes are selected, the family will display (sorted to the top) in Post Tuition Fees and Process ePayments but will be unchecked and highlighted in teal indicating they were omitted. The checkbox is inactive and cannot be selected to include the family. To include them, you must clear the Omit Family settings checkbox in their Family record.

**Preview Tuition Fees**

TRANSACTIONS: **8** | TOTAL AMOUNT: **630.00** | FAMILIES: **4** | STUDENTS: **5** | CLASSES: **3**

Total Fees | Currency | Total Families | Total Students | Total Classes

8 Selected

The checkbox is deactivated and cannot be selected to include the family. To have them included, the Omit Family setting checkbox in their Family record must be cleared.

Legend:  Duplicate Tuition Fee  Omitted

TRANSACTION DATE	FEE	DATE	CATEGORY 1	SESSION	FAMILY	CLASS	STUDENT	DUP REASON	DETAILS	DISCOUNT RULE	
<input type="checkbox"/> Nov 1, 2022	100.00	November	Base Fee=80.00	Jazz	2022 Fall	Newfield	Jazz - Tues 7pm	Nicole Newfield	Student	Details	No Discounts
<input type="checkbox"/> Nov 1, 2022	80.00	November		Ballet	2022 Fall	Devon	Ballet - Mon 6pm	Nadine Devon		Details	No Discounts
<input type="checkbox"/> Nov 1, 2022	75.00	November		Other Fees	2022 Fall	Devon	Acro - Mon 7pm	Nadine Devon		Details	No Discounts
<input checked="" type="checkbox"/> Nov 1, 2022	80.00	November		Hip Hop	2022 Fall	Aames	Hip Hop/Funk - Wed 7pm	Alistair Aames		Details	No Discounts
<input checked="" type="checkbox"/> Nov 1, 2022	75.00	November		Other Fees	2022 Fall	Ager	Acro - Mon 7pm	Danielle Ager		Details	No Discounts
<input checked="" type="checkbox"/> Nov 1, 2022	80.00	November		Ballet	2022 Fall	Ager	Ballet - Mon 6pm	Danielle Ager		Details	No Discounts
<input checked="" type="checkbox"/> Nov 1, 2022	80.00	November		Hip Hop	2022 Fall	Ager	Hip Hop/Funk - Wed 7pm	Danielle Ager		Details	No Discounts

## Find Families Who Have Been Omitted

## Automate Tuition Posting - Schedule Fees to Post Later

What is automation? Simply put, automation uses technology to perform tasks efficiently and safely. Because automated tasks are performed without human intervention, they save time, eliminate the possibility of human error, and ensure accuracy and consistency.

With Jackrabbit, you can automate your tuition fee posting by scheduling the fees to post later. A fee posting task can be scheduled as a one-off or as a recurring task.



Check your **Time & Date Settings**, including the **Daylight Saving dates**, to ensure tuition fees are scheduled correctly. Go to the *Gear icon > Settings > General > Organization Defaults*.

## Create a Task - Schedule a Tuition Fee Posting

The automation of tuition fee posting starts with the **Post Tuition Fees** feature.

- 1 Go to **Transactions** (menu) > **Post Tuition Fees**.
- 2 Choose **Post Later** in the *Post Tuition Fees - Post Setting*. Select the remaining criteria and settings that capture the fees you want to schedule to post at a later date. Learn more about the Post Tuition Fees [criteria and settings](#).
- 3 Click one of these options:
  - **Preview Fees** (green button) - opens the **Preview Tuition Fees Criteria** page. This page is a snapshot of the selected criteria on the date/time you are viewing it.  
**Note:** When the Tuition Fees post at a later date, the Transactions and Amounts will vary from the Preview Fees page depending on the date and time the tuition fees actually post.
  - **Post Later** (blue button) - this skips the next two steps and opens the **Schedule Tuition Fee Task** window in step 6.
- 4 Review the fees that are set to post. Return to the Post Tuition Fees page to make any necessary changes.
- 5 Click **Post Later** to open the *Schedule Tuition Fee Task* window.
- 6 Complete the details for the task, then click **Next**.

**Schedule Tuition Fee Task**

**Name**

**Schedule Starts**

**Recurrence**  
 REPEATS

**Ends On**  
 Never  
 On   
 After  Occurrences

**Name** - Give the task a descriptive name. This name appears in the *Task* column of the *Task Management* page.

**Schedule Starts** - This date will default to the date and time chosen in the criteria settings. You can change the date here if you have a preferred start date and time.

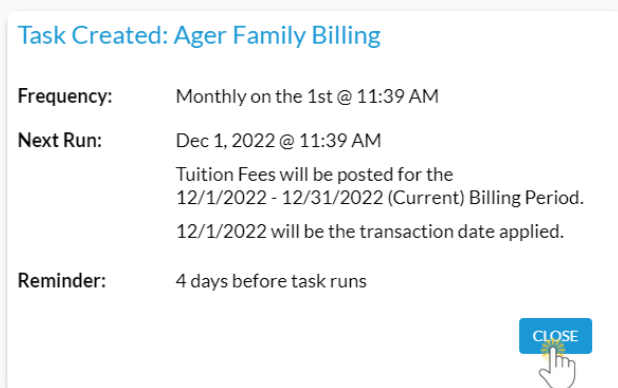
**Recurrence** - From the *Repeats* drop-down, select from:

- **Monthly/Weekly on the *date @ time***  
 (the *date* and *time* are based on the scheduled start date)
- **Monthly/Weekly on the *1st day of week @ time***  
 (the *day of week* and *time* are based on the scheduled start date)  
 Example - the start date falls on a Thursday. This option will post on the 1st Thursday of each month.
- **Custom**  
 Use this option to change how often the posting repeats. Instead of monthly or weekly, you can choose to post at a different interval, such as every 2 or 3 months (select from the drop-down list).

**Ends On** - Define when the task should end. The task end date is inclusive and will run on the end date.

- **Never** - the task will run indefinitely
- **On** - select a specific date with the *Calendar* icon
- **After** - a specified number of occurrences

- 7 Choose whether or not you want to send an email reminder to your [organization's email address](#). If you want to send a reminder, specify the number of days in advance it should be sent. Click **Save**. A confirmation window lets you know your task has been created and displays the details. Click **Close**.



When you close the confirmation window, you are taken to the Task Management page, where you can view, edit, pause, or delete a scheduled task. Learn more about [Automation Task Management](#).



If you want to exclude a family when scheduling a tuition posting task, select the [Omit Family from Transactions > Post Tuition Fees](#) setting on the *Billing Info* tab of their *Family* record.

## Edit Transactions



Permissions control the ability of your Users to see certain data and take specific actions. Before moving forward, review [User Permissions for Edit Transactions](#).

There are multiple ways to edit transactions in Jackrabbit. Edit all transactions or single transactions using the results grid under the *Transactions* menu > [Search Transactions](#) page. In addition, individual transactions can be edited directly within a *Family* record.

You select which users have permission to edit or delete transactions. All users with this ability should be aware of how either task can affect a family's account. It is a best practice to edit a transaction rather than delete it. However, deleting the transaction is appropriate if it was created in error.

Transactions can be restored - contact [Jackrabbit Support](#) for assistance.

---

⌵ Edit Transaction Rules

Expand/Collapse  
All

⌵ Edit Multiple Transactions from the Transaction Menu > Search

⌵ Edit a Single Transaction

---



Use caution when editing transactions as it can cause discrepancies with information already transferred to your accounting system, e.g. exported to QuickBooks.

## Delete Tuition Fees (Transactions Menu)

If you post a batch of tuition fees in error you can easily delete the batch posting.

1. Go to the **Transactions** (menu) > **Delete Transactions** > **Tuition Fees**. **Note: Be sure to select *Delete Tuition Fees*, not *Delete Transaction Fees*.**
  2. Choose a specific batch (batches are created using *Transactions > Post Tuition Fees*) or select search criteria to locate the tuition fees posted in error.
-



### Delete Tuition Fees

← RETURN    ✓ SUBMIT

This function will only delete fees created using "Post Tuition Fees", "Post Tuition by Hours", "Copy Class", "Post Late/Misc Fees" and "Post Annual Fees". To delete other types of transactions, use "Delete Transactions." To see what fees you would delete within a date range, use "Transactions Advanced Search."

Post Fee Batch: \*  
No Batch Selected

No Batch Selected

Created: 04/30/20 by helpcenter at 1:27AM, Posting Date: 04/30/20 Families: 7, Students:11, Classes: 6, Net Tuition: 998.50, 0 Deleted of Original 14 Loc., BatchID: 13274736 Posted From:PTF Discounts  
Created: 04/30/20 by helpcenter at 1:16AM, Posting Date: 04/30/20 Families: 8, Students:0, Classes: 0, Net Tuition: -800.00, 0 Deleted of Original 8 Loc., BatchID: 13274719 Posted From:Post Annual Fees

Select a specific batch from the drop-down list to delete an entire batch of tuition fees.

Location:

From Date: 8/14/2020

Through Date: 8/14/2020

Fees For Specific Classes: (Active Classes Only)

- Ballet - Beg - F (2019-2020)
- Ballet - Beg - Tue (2019-2020)
- Ballet - Beg - W (2019-2020)
- Ballet - Foundations - Th (2019-2020)
- Ballet - Pointe - T (2019-2020)
- Ballet - Pointe - W (2019-2020)
- Ballet L1 - Mon 7pm (Summer 2020)

More...

Entered by User:

✓ Submit

If you do not select a specific batch, you can choose specific criteria here.

3. Select **Submit**. In the confirmation window that asks, *Are you sure you want to delete tuition fees?*
4. Click **OK** in the confirmation window that asks, *Are you sure you want to delete tuition fees?* The tuition fees have been deleted and family balances have been updated.



Any fees linked to payments will not be mass deleted. Use Transactions > Search to find tuition fees that could not be deleted due to payment. Unlink the fee from the payment in order to remove the transaction.

## Tuition Not Posted Report

The **Tuition Not Posted** report provides you with a list of students who are enrolled in classes, but no tuition fees have been posted to their account.

Get to this report from the **Transactions** menu > **Transaction Reports** > **Tuition Not Posted Report**.

- ★ Confirm all students enrolled in classes have tuition fees posted to their family account.
- ★ Manage your tuition revenue stream.
- ★ Run this report after you finish posting your monthly tuition fees and before processing ePayments.

# Search Criteria

Filter the report using the Search Criteria and Jackrabbit will compile a list of students who meet ALL of the criteria chosen.

### Tuition Not Posted Report

← RETURN   **✓ SUBMIT**



Search Criteria   🔍 Favorites   📌 Save Favorites   ✕ Refresh   ?

This report will search for students that are enrolled in classes, but do not have a Tuition Fee posted for each class.

Enrollment (as of) from\* 8/1/2023 📅 through\* 8/31/2023 📅

No Tuition Fee posted on or after ▼ 8/1/2023 📅

# Report Results

The report results can be customized to show or hide columns of information, sort, and filter columns. Click **Adjust columns > Squeeze grid** (icon)  to view the entire grid on the page. Click the **More** (icon)  to export the report data to Excel.

### Tuition Not Posted Report

← RETURN

ALL RECORDS >

Showing 29 of 29 Records   ? HELP WITH GRID

Drag a column header and drop it here to group by that column

Click a Family link to open the Family record. Tuition fee can be posted there.

Export to Excel

STUDENT FIRST NAME	STUDENT LAST NAME	FAMILY	CLASS	SESSION	CAT1	ENROLL TYPE
Barbie	Ager	Ager	Ballet L1 - Tues 6pm	Summer 2023	Dance	Tfr Prev Session
Barbie	Ager	Ager	Ballet L1 - Mon 7pm	Summer 2023	Dance	Tfr Prev Session
Dani	Ager	Ager	Hip Hop L1 - Wed 7pm	Summer 2023	Dance	Tfr Prev Session
Kadie	Bowden	Bowden	Hip Hop L2 - Thurs 7pm	Summer 2023	Dance	Tfr Prev Session
Sallie	Bowden	Bowden	Hip Hop L2 - Thurs 7pm	Summer 2023	Dance	Tfr Prev Session
Debbie	Clements	Clements	Hip Hop L2 - Thurs 7pm	Summer 2023	Dance	Tfr Prev Session
David	Dierksen	Dierksen	Ballet L2 - Tues 7pm	Summer 2023	Dance	Tfr Prev Session
David	Dierksen	Dierksen	Tap L2 - Mon 7pm	Summer 2023	Dance	Tfr Prev Session

If a student's name is listed in the grid it means tuition may not be posted for the class/session. Sometimes it's tricky to find exactly why the tuition wasn't posted. We recommend you review the following to determine why the tuition was not posted and try the suggestions to fix the issue.

<p><b>Multiple students from the same class are listed on the report</b></p>	<p>Identify the issue that prevented the students from having tuition posted and rectify it.</p> <p><b>Example:</b> All students from the same class appear on the Tuition Not Posted report. When posting fees, a session value was selected but that session value did not exist in the Class record &gt; Summary tab so those students were not pulled into the batch.</p> <p><b>Solution:</b> Add the session value to the <i>Class</i> record.</p> <ol style="list-style-type: none"> <li>1. Go to the <b>Transactions</b> menu &gt; <b>Post Tuition Fees</b> and use the Search Criteria to post to those students all at once.</li> <li>2. Click <b>Preview Tuition Fees</b>.</li> <li>3. Select the checkbox in the last column (<b>Post</b>) for each student you want to post tuition fees and click <b>Post Fees</b>.</li> <li>4. Rerun the Tuition Not Posted report to confirm all the students on the report are removed.</li> </ol>
<p><b>Individual students listed on the report</b></p>	<p>Review one or all of the following to determine what the issue is and how to fix it.</p> <p><b>Example 1:</b> A tuition fee was posted to a family's account using the <b>Make Sale/Post Fees</b> page, however, an incorrect selection was made for either Type, Session, Student, or Class.</p> <p><b>Example 2:</b> A student shows up on the report because they transferred from one class to another after the tuition fees were posted, and the class on the Tuition Fee transaction would be the original class and the student is no longer in that class.</p> <p><b>Solution:</b> To resolve the issue with Example 1 or 2, click on the Family name in the report to access the Family record. Go to the Transaction tab and follow the procedure to <b>Edit a Single Transaction</b> to resolve the problem.</p> <p>Rerun the Tuition Not Posted report to be sure the student's name has been removed from the list.</p> <p><b>Example 3:</b> The student was taking the class as a trial, no further action needs to be taken.</p>



Refer to [Work with Grids in Jackrabbit](#) for more details on how easy and flexible these grids are to

work with. You can filter, sort, hide, lock, and adjust your report results.

## QUIZ - Lesson #9 - Tuition Fees - Overview

When you have worked through all of the articles outlined in the lesson, select the Take the Quiz button to be taken to the Lesson #9 Quiz where you can test your understanding of the concepts in this lesson. You will be asked to enter an email address for quiz results to be sent.

### Quiz #9 - Tuition Fees - Overview

**TAKE THE QUIZ**

Number of Questions	Total Possible Points	Points Needed for an "A"	Points Needed for a "B"	Points Needed for a "C"
5	9	8	7	6

[Return to Supervisors and Managers Menu to continue to next lesson](#)

[Click here to provide feedback for this lesson](#)

**BY CLASS FEE / BY TOTAL HOURS - Click to Choose Lesson(s)**

**Lesson #9.1 -  
Post Tuition for  
Classes with By  
Class Fee Billing  
Method**

**Lesson #9.2 -  
Post Tuition for  
Classes with By  
Total Hours  
Billing Method**

# Return to Supervisors and Managers Menu

