Fees (Person) [.2215 - .2227]

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

Classic View: Census > People > Fees

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

> If a fee was paid using an online payment, the fee Assignment, Payment or Adjustment should NOT be made void or exempt. If necessary, use the Payments Reporter to refund the payment.

What can I do?

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

Assign and Edit Fees

Assign a Fee | Edit a Fee Assignment

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

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

New Fee Assignment

Assign a Fee

1. Click the **New Fee Assignment** button.
   Result: The New Fee Assignment panel displays.

2. Select a **Fee** from the dropdown list.

   > If the fee amount is predetermined, this value appears after the fee description. Otherwise the value will show as 0.00.
   > If the fee amount is variable, an asterisk (*) appears after the amount.

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

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

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

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

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

Edit a Fee Assignment

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

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

Adjust Fees

Make an Adjustment | Edit an Adjustment

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

Make an Adjustment

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

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

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

> date.

4. If applicable, select the **Adjustment Type** such as Activity Cancelled, Cost Adjustment or Uncollectible.

5. Enter the amount to be removed from the fee(s) in the **Adjustment Amount** or **%** field.

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

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

Edit an Adjustment

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

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

Pay Fees

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

Example of Paying Multiple Fees with One Payment

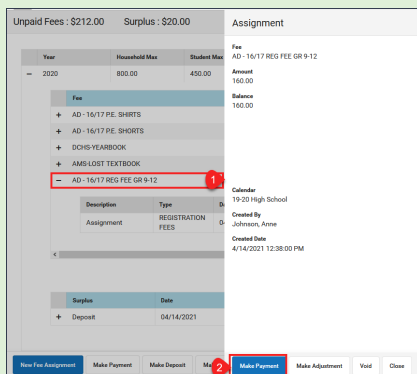# Make a Payment

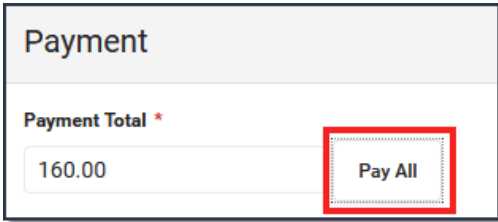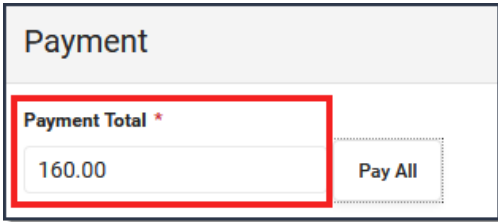1. Click the **Make Payment** button at the bottom of the screen.
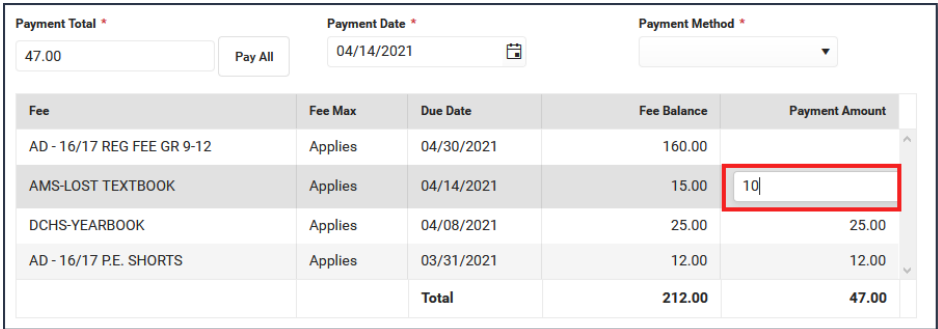   **Result**: The **Payment** panel displays all fees from all years for which a payment is needed.
   ▸ Click here to expand...

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

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

Option	Description
Pay All	Click **Pay All** to populate this field with the total amount remaining to be paid.
Payment Total	The **Payment Total** field at the top of the panel allows you to enter the amount to be paid. If the total amount exceeds the Fee Assignment amount, the remaining amount is deposited as a surplus.
Payment Amount	The **Payment Amount** column allows you allows you to manually enter a unique value for each line. Campus automatically updates the Payment Total to match the values you enter.

4. Enter any **Comments** associated with the payment.

5. Select one of the following **Payment Methods** and complete the payment.

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

Payment Method	Description
	  Result The payment displays below the fee(s) with the type and date of the payment, the amount paid in the **Credit** column. If more than the amount of the fee selected is paid, the extra amount becomes a **Surplus**. Campus saves the surplus amount and it can be applied to other fees.
Surplus (Balance: $XX.XX)	This option only displays if a surplus is available on the account. Click the **Make Payment** button. **Result** The Surplus Balance is reduced by the amount used to pay the fee. The payment displays below the fee(s) with the type and date of the payment, the amount paid in the **Credit** column.
Record Credit/Debit Card	If your district does NOT use Online Payments or a Desktop Card Reader, enter the **Reference Number** then click the **Make Payment** button. **Result** The payment displays below the fee(s) with the type and date of the payment, the amount paid in the **Credit** column. If more than the amount of the fee selected is paid, the extra amount becomes a **Surplus** Campus saves the surplus amount and it can be applied to other fees.
Process Credit/Debit Card (Card Swipe)	Complete these steps if you are using a Desktop Card Reader. ▸ Click here to expand…

Process Credit/Debit **Payment Method** **Card** (Manual Entry)	**Description** Complete these steps if you do not have a Desktop Card Reader. ▸ Click here to expand...

Payment Panel

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

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

Below the **Comments** section, the panel displays all fees paid with that payment, the due dates of each fee, and the amount paid for each fee.
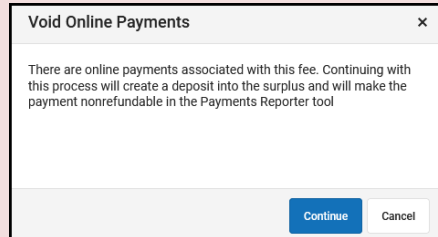
Void a Fee Assignment, Payment, or Adjustment

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

Important Information About this Process

Void an Assignment, Payment, Or Adjustment

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

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

a **Payment**	includes the Payment Date, the Amount paid, the Payment Method and any Fee Payment Comments. A table detailing the payment transaction appears following the summary information which includes the Fee, the Due Date, the Amount owed and the Payment Amount, as well as any deposits made as a result of the payment.
	When voiding a Payment, indicate the **Payment Void Type**.
	  ○ **Void payment to this fee and create deposit** voids the selected payment only and creates a surplus with the amount paid.
	  ○ **Void payments to all fee assignments paid with this fee payment** voids the selected payment and any other payments made in the same transaction. All payments made in the transaction payment are listed in the payment transaction table.
	Expand the area below to see an example of this screen.
	▶ Click here to expand...

an **Adjustment**	includes the Void Date, Void Reason, and any Adjustment Comments. Expand the area below to see an example of this screen. ▶ Click here to expand...

When voiding...	The Void Detail Screen...

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

Fee		Due Date			Balance
− Senior Trip (Void)		02/17/2022			0.00

Description	Type	Date	Debit	Credit
Assignment	Field Trip	02/16/2022	100.00	0.00
Payment	In Office	02/16/2022	0.00	100.00
Void Payment	Cancellation Related	02/17/2022	100.00	0.00
Void Assignment	Cancellation Related	02/17/2022	0.00	100.00

Make a Deposit (Surplus)

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

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

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

Make Refund from Surplus Amount

Deposits create a **surplus** that can be applied to future fee assignments. Any amount paid which exceeds the amount owed also becomes a **Surplus**. The **Surplus** amount appears at the top of the

Fees Editor.

To refund all or part of a Surplus, click the **Make Refund** button. The Refund panel displays and you can enter a **Refund Amount**, a **Transaction Date**, any **Comments** associated with the refund and click **Make Refund**. Campus subtracts the refund amount from the surplus total.

The district or school is responsible for returning the refund to the account holder.