

PSUG REGIONAL ACADEMY

Users Helping Users



Fees Management

PowerSchool Student Information System

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Agenda

- Intro
- Overview of fees
- Setup
- Work with students
- Reports

About the trainer. . .

Experience:

- 26 Years in Education, the last 13 using PowerSchool at all levels (teacher, School Admin, District Admin).
- 17 years as a Middle School History and Computer Teacher as well as an Assistant Principal.
- 3 years as the Technology Coordinator for the Diocese of Wilmington, Delaware
- The past 8 years as a PowerSchool Support Specialist for Computer Logic Group (CLG).
- Certified Level II PowerSchool Trainer
- Responsibilities at CLG include providing Help Desk Support to our Customers, Custom Report Creation and Training.
- CLG is a dedicated provider of Hosting for PowerSchool, Help Desk Support, Customization and Training.

<http://clgeducationsolutions.com>

Personal:

- I am from Smyrna, Delaware and am Married with two girls ages 28 and 6.
- Presenter for the PSUG Events for 4 years

Overview



Overview

- Provides the ability to assess fees to students through school enrollment, course enrollment or on an individual needs basis.
- Tracking the fees can provide payment distribution or refunds
- Fees can also be displayed on the parent portal
- Fees Management is not related to Lunch Balances

Setup



Setup

- Fee categories (District)
- Payment methods (District)
- Fee types (School)
- School enrollment fees (District)
- Course enrollment fees (School)

Fee Categories (School setting)



Fee Categories – organizational tool to group fee types together

- School
- Course
- Athletic
- Miscellaneous

How to add a fee category

- From start page, choose District
 - Select Fee Categories
 - Select New
 - Enter a category name
 - Examples in my district include:
 - » Athletics
 - » Miscellaneous

How to add a fee category (cont.)

The screenshot shows the PowerSchool interface. At the top, the logo 'PowerSchool' is on the left, and 'School: District Office' and 'Term: 11-12 Year' are on the right. Below the logo is a breadcrumb trail 'Start Page > District Setup'. The left sidebar contains a navigation menu with sections: 'Functions' (Attendance, Daily Bulletin, Enrollment Summary, Master Schedule, Dashboard, Special Functions, Teacher Schedules), 'Reports' (System Reports, ReportWorks), 'People' (Student Search, Staff Search, Parent Search, Enroll New Student, New Staff Entry, New Parent Entry), and 'Setup' (District, System, Personalize). An arrow points from the 'Fee Categories' link in the 'Setup' section to the table below. The table is titled 'District Setup' and has two columns: 'General Functions' and 'Description'. The table lists various system functions and their descriptions.

General Functions	Description
Attendance	Set attendance preferences for all schools on this server.
Attendance Tracking and Notification	Define global parameters for attendance tracking and notification purposes.
Calendar Membership Types	Define unique school day types.
Citizenship Codes	Define server citizenship codes and definitions.
Courses	Associate courses to current school from district master list.
District Info	Define names and general information for the district.
Districts of Residence	Define incoming student district information.
Entry Codes	Define global membership entry codes and definitions.
Exit Codes	Define global membership exit codes and definitions.
Family Management	Define fields that will be shared between family members.
Federal Ethnicity and Race Settings	Define global ethnicity settings, and race codes and meanings.
Fee Categories	Define categories for fees.
Graduation Planner Setup	Create Graduation Plans for all schools on this server.
Health Setup	Define Health Screenings and Immunizations
Incident Management	Configure incident management types, codes, and sub-codes.

How to add a fee category (cont.)

The image shows two screenshots of the PowerSchool web application interface. The top screenshot displays the 'Fee Categories' page, and the bottom screenshot displays the 'New Fee Category' form. A black arrow points from the 'New' button in the top screenshot to the 'New Fee Category' form in the bottom screenshot.

PowerSchool School: District Office Term: 11-12 Year

Start Page > District Setup > Fee Categories

Functions

- Attendance
- Daily Bulletin
- Enrollment Summary
- Master Schedule
- Dashboard
- Special Functions
- Teacher Schedules

Reports

- System Reports
- ReportWorks

People

- Student Search
- Staff Search
- Parent Search
- Enroll New Student
- New Staff Entry
- New Parent Entry

Setup

- District
- System

Fee Categories

[New](#)

Fee Category
Athletics
Course
Miscellaneous
School

School: District Office Term: 11-12 Year

Fee Categories > New Fee Category

New Fee Category

Label	Value
Fee Category	<input type="text"/> (Limit 20 characters)

[Submit](#)

How to add a fee category (cont.)

- Edit a fee category
 - Click on the fee category
 - Edit the name then remember to submit
- Delete a fee category
 - Click on the fee category
 - Click on delete, then confirm the delete
 - It is recommended that you do not delete the default fee categories.
 - If you delete a fee category you will need to update any fee record that was within that category and select a new fee category.

Payment Methods (District Setting)



Payment Methods

- 6 Default payment methods are provided

Payment Method

		New
Code	Description	
CC	Credit Card/Bank Card	
CK	Check/Draft	
CS	Cash	
EFT	EFT	
MO	Money Order	
Other	Other	
PP	PayPal	

Note: This list of payment methods applies to all schools using this PowerSchool server.

Payment Methods

- You can create any payment type applicable to your district
Payment Method

The interface displays a table of existing payment methods and a form to create a new one.

Code	Description
CC	Credit Card/Bank Card
CK	Check/Draft
CS	Cash

New Payment Method

Option	Value
Code	<input type="text"/>
Description	<input type="text"/>

Payment Methods (cont.)

- Add –
 - District
 - Payment Methods
 - New
 - » Code and Description are required
- Edit –
 - District
 - Payment Methods
 - » Click on the payment method to edit
- Delete –
 - District
 - Payment Methods
 - » Click on the payment method to delete
 - » Click on delete, confirm delete

If you delete a payment method you must then update any fee record with a new payment method.

Fee Types (School Setting)



Fee Types

Functions

- Attendance
- Daily Bulletin
- Enrollment Summary
- Master Schedule
- Dashboard
- Special Functions
- Teacher Schedules

Reports

- System Reports
- ReportWorks

People

- Student Search
- Staff Search
- Parent Search
- Enroll New Student
- New Staff Entry
- New Parent Entry

Setup

- School
- System
- Personalize

Applications

- PowerLunch
- PowerScheduler
- PS Administrator
- PT Administrator
- ReportWorks Developer

School Setup

Attendance	Description
Attendance Codes	Define attendance codes and their attributes.
Attendance Code Categories	Define attendance code categories such as tardy, excluded.
Attendance Conversions	Define attendance calculation conversion settings used when calculating ADA.
Attendance Tracking and Notification	Define parameters for attendance tracking and notification purposes.
Full-Time Equivalencies (FTE)	Define student full-time equivalencies used when calculating ADA.
Preferences	Specify general attendance preferences.
Section Attendance Settings	Set attendance recording options for Sections that meet more than once on the same day.
Quick Look Up Preferences	Set display preferences for the Quick Look Up Report Page.

Calendaring	Description
Automated Calendar Setup	Set up calendar days according to a pattern.
Bell Schedules	Define bell schedules for the current school
Calendar Setup	Assign days to membership types and schedules.
Reporting Segments	Define beginning and ending dates for special reports.

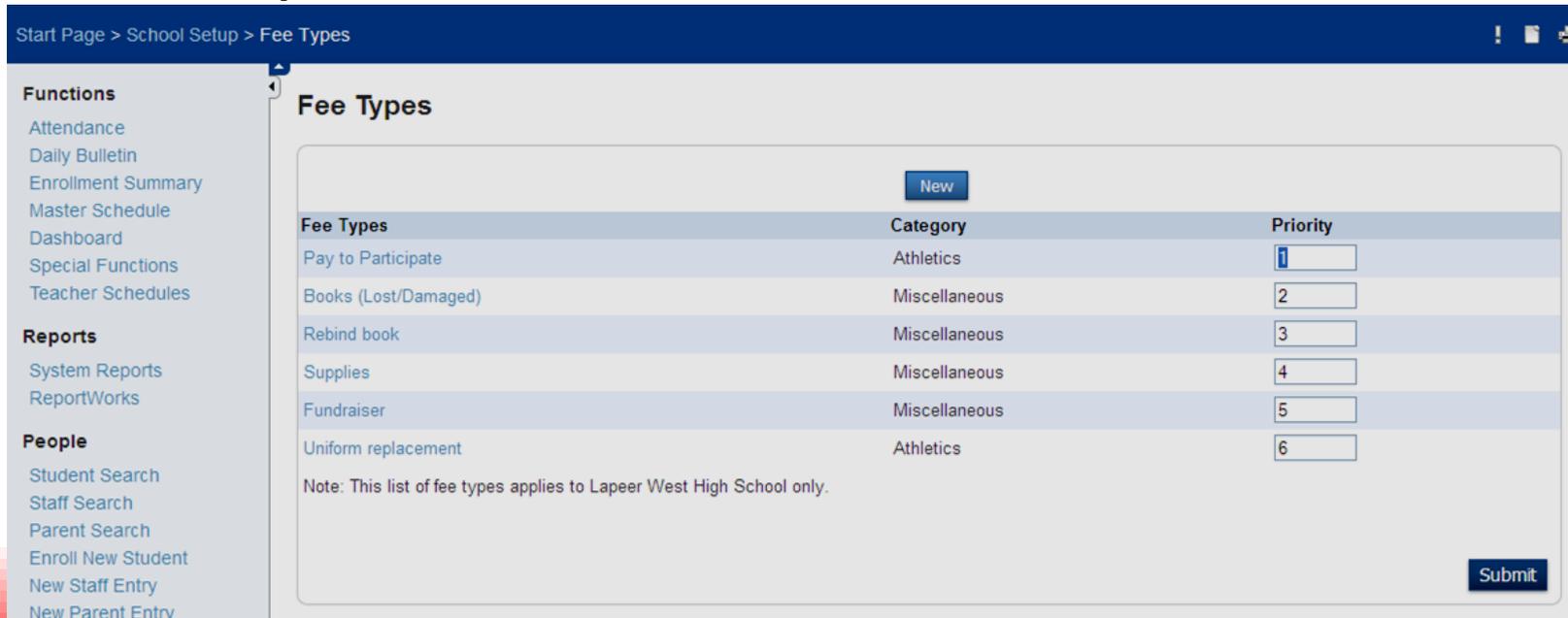
General	Description
Activities Setup	Define school specific extra-curricular activities.
Balance Alert	Define cutoffs for fee and lunch balance alerts.
Boundary	Define the geographical boundary for this school.
Fee Types	Define fee types.
Graduation Planner Setup	Enable Graduation Plan Progress for students.
Miscellaneous	Define other setup items.
Mobile Settings	Define mobile access setup items for this school.
Sub Sign In Settings	Define substitute teacher sign in IDs and passwords.

Fee Types (cont.)

- Add –
 - School Setup (each school will need to be setup for fees)
 - Fee Type
 - New
 - » Fee Type, Fee Category and Fee Type Description
- Edit –
 - School Setup
 - Fee Type
 - » Click on the name of the fee type to edit it.
- Delete –
 - School Setup
 - Fee Type
 - » Click on the name of the fee type to edit it
 - » Click on delete, confirm delete
 - » Again, if you delete a fee type you will need to update any fee records to a new fee type.

Fee Types – Rank

Once you have fee types, you can choose the rank that you would like the fees to be paid if the full balance isn't paid. The lower value (1) will be paid first.



Start Page > School Setup > Fee Types

Functions

- Attendance
- Daily Bulletin
- Enrollment Summary
- Master Schedule
- Dashboard
- Special Functions
- Teacher Schedules

Reports

- System Reports
- ReportWorks

People

- Student Search
- Staff Search
- Parent Search
- Enroll New Student
- New Staff Entry
- New Parent Entry

Fee Types

[New](#)

Fee Types	Category	Priority
Pay to Participate	Athletics	<input type="text" value="1"/>
Books (Lost/Damaged)	Miscellaneous	<input type="text" value="2"/>
Rebind book	Miscellaneous	<input type="text" value="3"/>
Supplies	Miscellaneous	<input type="text" value="4"/>
Fundraiser	Miscellaneous	<input type="text" value="5"/>
Uniform replacement	Athletics	<input type="text" value="6"/>

Note: This list of fee types applies to Lapeer West High School only.

[Submit](#)

Enrollment (District Setting)



School Enrollment

School enrollment fees are used to automatically assess fees when a student enrolls in school.

- Add –
 - District Setup
 - Schools/School Info (Each school will need to setup individually)
 - Select the name of the school
 - School Enrollment Fees section select New
 - » School Name,
 - » Fee Type – Choose from the pop-up menu
 - Only fee types that have a school fee category type will appear in the pop-up menu
 - » Department – Choose from the pop-up menu
 - » Amount
 - » Date
 - » Pro Ratable - Allows the student to only be charged for the number of days they would be enrolled in the school.
- Edit
- Delete

Course Enrollment

Course enrollment fees are used to assess certain fees when a student enrolls in that course, ie. textbook, supplies.

- Add –
 - School Setup
 - Courses (Each course will need to setup individually)
 - Select the name of the course
 - Select the Fees tab
 - » Course Name
 - » Course Number
 - » Fee Type – Choose from the pop-up menu
 - Only fee types that have a course fee category type will appear in the pop-up menu
 - » Department – Choose from the pop-up menu
 - » Amount
 - » Date
 - » Description
 - » Pro Ratable - Allows the student to only be charged for the number of days they would be enrolled in the course.
- Edit and Delete

Course Enrollment

Course enrollment fees are used to assess certain fees when a student enrolls in that course, ie. textbook, supplies.

Edit Course Enrollment Fees - Studio Pottery (ART2000)

District **Fees** Prerequisites Availability Relationships Scheduling Equivalencies

[New](#)

Fee Type	Amount
New Course Fee	
Label	Value
Course Name	Studio Pottery
Course Number	ART2000
Fee Type	<input type="text"/>
Department	Art Supplies [s Found]
Amount	<input type="text"/>
Date	01/05/2015 (MM/DD/YYYY)
Description	<input type="text"/>
Proratable	<input type="checkbox"/>

[Submit](#)

Working with students



Working with Students

- Fee exemption status
- Fee transactions
- Fee functions
- Search for students with balances
- End-of-year balances

Fee exemption status

Provides exemption status to individual student by the option chosen

- Student not exempted
- Student exempted from course fee
- Student exempted from school fee
- Student exempted from all fees

Fee exemption status (cont.)

- Select the student
 - Other Information Screen
 - Choose the appropriate response from the drop-down menu.

The screenshot displays the 'Other Information' screen for a student. The left sidebar contains a navigation menu with the following items: Custom Screens, Demographics, Emergency/Medical, Family, Health, Modify Info, Other Information (highlighted with a black arrow), Student Email, Parents, Photo, State/Province - MI, and Transportation. Below these is the 'Academics' section with items: Analytics, Attendance, Enter Attendance, Cumulative Info, and Graduation Plan Progress. The main content area includes the following fields:

Homeless Code	<input type="text"/>	Equip Flag	<input type="text"/>
Date Of Entry Into USA	<input type="text"/> (MM/DD/YYYY)	MESA	<input type="text"/>
AFDC Application Number	<input type="text"/>	AFDC Approved	<input type="text"/>
Primary Language Code	<input type="text"/>	PHLOTE	<input type="text"/>
Secondary Language Code	<input type="text"/>	Exclude From Class Ranking	<input type="checkbox"/>
		Fee Exemption Status	<input type="text" value="Student Not Exempted"/>
Other Alert			
Other Alert Text			
Alert Expires (Date)			

The 'Alert Expires (Date)' field is set to 0/0/0 (MM/DD/YYYY) (0/0/0 to never expire).

Fee exemption status (cont.)

You can also exempt all students within any given school.

- District
 - Schools/School Info
 - Select the appropriate school
 - Choose the fee exemption status from the pop-up menu

School Fee Information

Fee Exemption Status: (Dropdown menu open with options: Students Not Exempted, Students Exempted from Course Fees, Students Exempted from School Fees, Students Exempted from All Fees)

Auto Enrollment Program

[Special Program Link](#)

A program should only be specified here if ALL students in this school are enrolled into the program when they are enrolled in the school. Otherwise this option should be left blank.

School Enrollment Fees

Fee Type	Amount
No enrollment fees for this school.	

Fee transactions

Fee Transaction Summary

Test Scores
Truancies

Administration

- District Specific
- Fee Transactions
- Log Entries
- Lunch
- Lunch Transactions
- Net Access
- SEOP Review
- Incidents

Enrollment

- Activities
- All Enrollments
- Functions
- Special Programs
- Transfer Info

Create New Fee

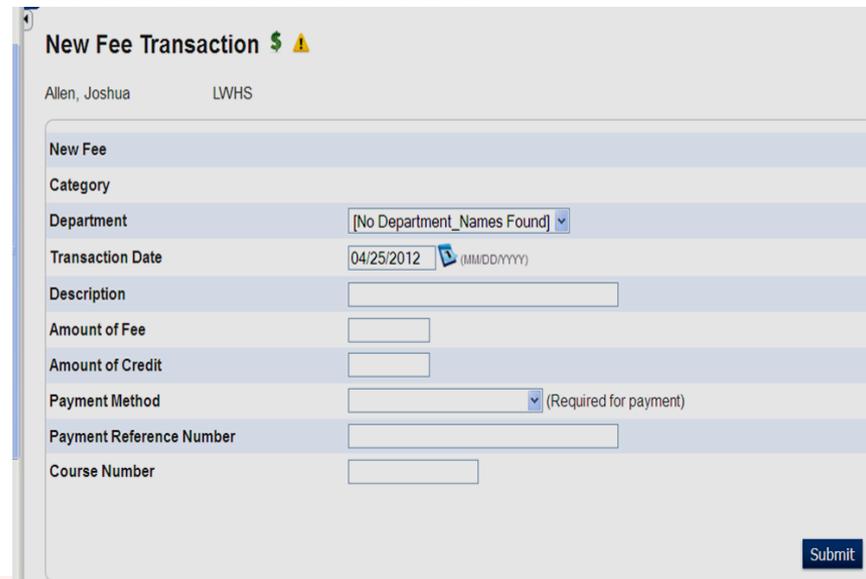
Date	Course Fee Type	Priority	Description	Charged	Adjust.	Fee	Paid	Balance	Transaction	
11/25/2009	Supplies	4	Metals Project - Gutenschwager	4.25	0.00	4.25	4.25	0.00		
08/20/2010	Pay to Participate	5		120.00	0.00	120.00	120.00	0.00		
06/15/2011	Supplies	4	Wood Fee - Hilgendorf	8.00	0.00	8.00	8.00	0.00		
08/25/2011	Pay to Participate	5		150.00	0.00	150.00	150.00	0.00		
11/23/2011	Rebind book	2	Rebind Alg II #5-23 - Roberts	9.00	0.00	9.00	9.00	0.00		
						Totals:	291.25	291.25	0.00	Distribute

[All Transactions](#) [Fee Balances](#)

Note: Credits are distributed across all outstanding fees based on fee type priority.

Fee transactions (cont.)

- To assess a single student a fee
 - Select the fee transaction student screen
 - Choose the appropriate fee type from the drop down menu under “Create new fee”
 - Complete details



The screenshot shows a web application interface for creating a new fee transaction. The title is "New Fee Transaction" with a dollar sign and a warning icon. The user's name "Allen, Joshua" and the institution "LWHS" are displayed. The form contains several fields:

New Fee	
Category	
Department	[No Department Names Found]
Transaction Date	04/25/2012 (MM/DD/YYYY)
Description	<input type="text"/>
Amount of Fee	<input type="text"/>
Amount of Credit	<input type="text"/>
Payment Method	<input type="text"/> (Required for payment)
Payment Reference Number	<input type="text"/>
Course Number	<input type="text"/>

A "Submit" button is located at the bottom right of the form.

Fee Functions

- To assess multiple students a fee
 - Select students

The screenshot shows the PowerSchool interface in a Mozilla Firefox browser. The browser's address bar displays the URL `10.16.0.225/admin/studentlist/feefunctions.html`. The page header includes the PowerSchool logo, the user name **Brenda Weir**, and the school information: **School: Lapeer West High School** and **Term: 11-12 Trimester 3**. The breadcrumb trail is **Start Page > Special Functions > Fee Functions**. A left-hand navigation menu lists various sections: **Functions** (Attendance, Daily Bulletin, Enrollment Summary, Master Schedule, Dashboard, Special Functions, Teacher Schedules), **Reports** (System Reports, ReportWorks), and **People** (Student Search, Staff Search, Parent Search, Enroll New Student, New Staff Entry, New Parent Entry). The main content area is titled **Fee Functions** and shows a table with the following data:

Function	Description
New Fee	Add a fee for currently selected students.
New School Enrollment Fee	Add a school enrollment fee for currently selected students.
New Course Enrollment Fee	Add a course enrollment fee for currently selected students.
New Transaction	Add a transaction for currently selected students.
Assess School Enrollment Fees	Automatically assign school enrollment fees to students.
Assess Course Enrollment Fees	Automatically assign course enrollment fees to students.
Clear Current Balance	Create transaction opposite to each non null fee balance.
Reverse Action Using Group Transaction ID	Reverse an action by using the group transaction ID.

Current student selection: 4

Search for students

- Students search codes examples
 - `*fee.fee_balance>0`
 - `*fee.fee_category_name=Athletics`
 - `*fee.fee_type_name=Pay to Participate`
 - `*fee.fee_course_number=`
 - `*fee.fee_balance=partial`

End-of-year process

- Have the option to zero out the fee balance or roll over to the next school year.
 - If the student has a balance the system will create an SOY balance on the fee transaction page.
 - Work around to provide fee transaction information rather than just the SOY balance
 - In DDA – BE CAREFUL!!!!
 - » Change the YearID and TermID to match the new yearID and new year TermID on all fees
 - » Delete the SOY balance by locating the correct Fee_type_ID=-3

Reports



Reports

- Add the student's fee balance to a report card or other report
 - `^(fee_GetStudentBalance)`
- Using an object report you can list the fees using New Fee List Object
 - Invoice

Miscellaneous



Display Fee Balance on Portal

- School Setup
 - Balance Alert

The screenshot shows a web application interface for setting up balance alerts. The breadcrumb trail at the top reads 'Start Page > School Setup > Balance Alert Setup'. A left-hand navigation menu is visible with sections for 'Functions', 'Reports', and 'People'. The main content area is titled 'Balance Alert Setup' and contains two rows of configuration options. Each row has a text input field for a numerical value and a dropdown arrow. The first row is for 'lunch balance' with the value '5', and the second row is for 'fee balance' with the value '0'. Below these rows is a large text area for a custom message, which currently contains the text: 'This message will display in the alert window along with the balances of Lunch and Fees.' A small tooltip box is visible over the text area with the text: 'Please submit outstanding balances to either the school building your student attends or to the Administration and Services Center'. A 'Submit' button is located at the bottom right of the form.

Start Page > School Setup > Balance Alert Setup

Functions

- Attendance
- Daily Bulletin
- Enrollment Summary
- Master Schedule
- Dashboard
- Special Functions
- Teacher Schedules

Reports

- System Reports
- ReportWorks

People

- Student Search
- Staff Search
- Parent Search
- Enroll New Student
- New Staff Entry
- New Parent Entry

Balance Alert Setup

When a Student's lunch balance falls below an alert will display on the student pages. Email will also be sent to parents who choose to receive "Balance Alert" emails.

When a Student's fee balance goes above an alert will display on the student pages. Email will also be sent to parents who choose to receive "Balance Alert" emails.

Please submit outstanding balances to either the school building your student attends or to the Administration and Services Center

This message will display in the alert window along with the balances of Lunch and Fees.

Tables

- [146]Fee
- [147]Fee_Transaction
- [148]Fee_Balance
- [144]Fee_Type

Tips and tricks

- Students that transfer between schools within my district.
 - Use DDA to change the SchoolID so that the information will appear on the student fee screen.
- To use the reverse transaction function you must know the group transaction ID.