NEXT GEN DOCUMENTATION
~TUITION / FEES~

Table of Contents

Student Scope

The Student Scope is a link found in the Quick Links on many of the main pages in JMC's Next Gen Office Application.

The Student Scope allows you to simultaneously view 6 different types of data for a student from the JMC Next Gen database. Each individual user may specify which 6 types of data they wish to view in the Student Scope.

The following is a list of the types of data that may be viewed within the Student Scope, depending upon what access is assigned to your user account in JMC:

- Attendance
- Schedules
- Student Lunch Transactions
- Period Attendance
- Discipline
- Health Immunizations
- Report Cards
- Student Contacts
- Student Progress Report
- Student Transcript

An example of how to get to the Student Scope is shown here is <u>Schedules – Student – Edit Schedules</u>.

Notice the Student Scope link on the right of the page under Quick Links.   If you click on the Student Scope link you will get a page that pops up similar to the next figure.

A Quick Link to Student Scope may also be found on <u>Edit – Student Data</u> and <u>Grading – Entry – Edit Grades</u>.

Mozilla Firefox

http://localhost:53212/StudentScope.aspx

Student ID:	Name:	Grade:	Gender:	StateID:	Stu Email:
569	Adams, Carla	7	F	1234567890123	cadams@someisp.net
Contact:	**Phone:**	**Email:**			

Student Progress Report ▼ [Print]

Term	Period	Course		Progress Term			Teacher
Sem1	1	BAND JH	Qtr1	Qtr2			D Schultz
Sem1	2	MATH 7	Qtr1	Qtr2			J Ashford
Sem1	3	SOCIAL 7	Qtr1	Qtr2			P Hughes
Sem1	4	SCIENCE 7	Qtr1	Qtr2			Q Neidermeier
Sem1	5	PE/HEALTH 7	Qtr1	Qtr2			M Kelsey
Sem1	7	ENGLISH 7	Qtr1	Qtr2			G Peterson
Sem2	1	BAND JH			Qtr3	Qtr4	D Schultz
Sem2	2	MATH 7			Qtr3	Qtr4	J Ashford
Sem2	3	SOCIAL 7			Qtr3	Qtr4	P Hughes
Sem2	4	SCIENCE 7			Qtr3	Qtr4	Q Neidermeier
Sem2	5	PE/HEALTH 7			Qtr3	Qtr4	M Kelsey
Sem2	7	ENGLISH 7			Qtr3	Qtr4	G Peterson

Schedules ▼ [Print]

Period	Course	Course#	Term	Days Met	Teacher	Room
1	BAND JH	567	Sem1	12---	D Schultz	BAND
2	MATH 7	573	Sem1	12---	J Ashford	ROOM 132
3	SOCIAL 7	570	Sem1	12---	P Hughes	ROOM 133
4	SCIENCE 7	571	Sem1	12---	Q Neidermeier	ROOM 125
5	PE/HEALTH 7	575	Sem1	12---	M Kelsey	ROOM 131
7	ENGLISH 7	569	Sem1	12---	G Peterson	ROOM 134
1	BAND JH	567	Sem2	12---	D Schultz	BAND
2	MATH 7	573	Sem2	12---	J Ashford	ROOM 132
3	SOCIAL 7	570	Sem2	12---	P Hughes	ROOM 133
4	SCIENCE 7	571	Sem2	12---	Q Neidermeier	ROOM 125
5	PE/HEALTH 7	575	Sem2	12---	M Kelsey	ROOM 131
7	ENGLISH 7	569	Sem2	12---	G Peterson	ROOM 134

Student Lunch Transactions ▼ [Print]

Family Lunch Balance = $ -2.20

Deleted	Date	User	Transaction	Purchase	Status	Amount	Balance
False	02/03/2015	JMCADMIN	Transfer:			$ 2.20	$ 0.00
False	02/03/2015	JMCADMIN	Student Lunch	P		$ -2.20	$ -2.20
False	07/10/2014	JMCAD	Deposit			$ 0.00	$ 0.00

Period Attendance ▼ [Print]

Periods for Day	0	1	2	3	4	5	6	7

No absences or tardies for this student.

	0	0	0	0	0	0	0	0

Reason Code	Reason
0	No Note or Call
1	Sent to Office
2	Sick
3	Appt-Other
4	Doctor
5	Dental-Ortho
6	Overslept

Health Immunizations ▼ [Print]

Immunization	Date (Age)	Exemption Dosage	Administered at School
DTaP Diptheria, Tetanus, and Pertussis	10/1/2001 (0Y 2M)	- Full	☐
DTaP Diptheria, Tetanus, and Pertussis	12/3/2001 (0Y 4M)	- Full	☐
DTaP Diptheria, Tetanus, and Pertussis	2/4/2002 (0Y 6M)	- Full	☐
DTaP Diptheria, Tetanus, and Pertussis	10/28/2002 (1Y 3M)	- Full	☐
DTaP Diptheria, Tetanus, and Pertussis	9/19/2005 (4Y 1M)	- Full	☐
IPV	10/1/2001	-	

Discipline ▼ [Print]

To change the type of data viewed in any of the 6 panels in the Student Scope, simply click on the menu in the upper left corner of that panel and select a different data type.

Instructional Videos for Tuition/Fees Module

This is a short introduction to the Tuition/Fees module for users new to the program.
http://jmcinc.com/resources/view/tuition_fees_introduction

JMC Tuition/Fees Overview

The Tuition/Fees module of JMC Next Gen Office Application gives your district the ability to keep track of tuition and fees, such as tuition, book fees, activity fees, shop fees, etc.

The **basic tasks and reports** for the fees software options are:
      -setting up fees in the office
      -charging fees throughout the school year
      -printing reports and maintaining accounts in the office

Defining the Fees
Defining the fees must be done before any transactions can be processed. These can be set at various levels for free and reduced students as desired.

Setting Up Student Fee Accounts
The accounts for students will need to be established. Most students will already be in the JMC data for the current year; however, new students will need to be added to the database before they can use their fee accounts. Select Edit-Student Data or Edit-New Student Wizard to add new accounts.

Setting Up Family Accounts
The accounts for families will need to be established if fee transactions for a family are to be drawn from one central account. To set up family fee accounts, the fee contacts may be set individually on the Edit-Student Data screen or en masse using the Tuition/Fees-Data-Initialize Family Fee Contacts option. The Tuition/Fees-Data-Initialize Family Fee Contacts option will create a fee contact, based upon primary contacts, for all students who do not yet have a fee contact.

Deposits can then be made into the fee contacts' accounts on the Tuition/Fees-Data-Edit Student Fee Data or Tuition/Fees-Data-Edit Family/ORG Fee Data screens.

When using family fee accounts, deposits would be put into the family fee account rather than the student's fee account.

Parent Access to Fee Account Transactions and Balances
Schools that have purchased the Online Parent feature of the JMC Office software will have the ability to post fee transactions and account balances online for parents to access. Parents will need to be designated as the Fee contact for all pertinent students and will need to have a login password assigned in the JMC Office Application. The parents' passwords may be assigned under Attendance-Contacts-Edit Contacts.

Tuition/Fees—Data — Edit Student Fee Data

This option may be used to edit and enter the fees for a student account.

1. Select Tuition/Fees—Data—Edit Student Fee Data. The page will appear similar to Figure 1.

Figure 1:

Edit Student Fee Data

2. Select the student to be edited by typing the name of the student in the **Find** box at the top of the page and then selecting the student from the drop down list.

Charge   To add a charge to a student's account click the **Charge** button. The page will appear similar to Figure 2. Then specify the type of charge, date, and any other pertinent information about the charge and click **OK** to save the charge. Then click **Close**. The page will then appear similar to Figure 3.

Figure 2:

Adding a charge for a student

Figure 3:

Fee added to Student's Account

Payment To record a payment to a student's account, click the **Payment** button. The page will appear similar to Figure 12. Then specify the type of payment, date, and any other pertinent information about the payment and click **OK** to save the charge. By specifying the payment type "Fee" you may choose the specific fee to apply this payment toward. Then click **Close**.

Figure 4:

Entering a Payment for a Student's Account

Refund   To record a refund to a student's account, click the **Refund** button. The page will appear similar to Figure 5. Then specify the type of refund, date, and any other pertinent information about the refund and click **OK** to save the charge. Then click **Close**.

Figure 5:

Entering a
Refund for a
Student's
Account

Print Transactions   To print a list of the student's account transactions, click the **Print Transactions** button. The page will appear similar to Figure 6. Enter the date range for the transactions desired and click **OK**. The page will then appear similar to Figure 7.

Figure 6:

Entering the Date Range
for Print Fee Transactions

Figure 7:

Sample Report for Print Fee Transactions

Print Notice To print a notice that includes the student's current balance as well as a message, click the **Print Notice** button. The page will appear similar to Figure 8. Enter the message and click **OK**. The page will then appear similar to Figure 9.

Figure 8:

Entering a Message for the Print Notice option

Figure 9:

Sample Report for Print Notice Option

Suggested Monthly Payment To enter or edit the suggested monthly payment for the student, simply enter the value in the box for the **Suggested Monthly Payment** and click the **Save** button to the right of that box.

Tuition/Fees—Data — Edit Family/ORG Fee Data

This option may be used to edit and enter the fees for a family account.

1. Select Tuition/Fees—Data—Edit Family/ORG Fee Data. The page will appear similar to Figure 10.

Figure 10:

Edit Family/ORG Fee Data

2. Select the student to be edited by typing the name of the family in the **Find** box at the top of the page and then selecting the student from the drop down list.

Charge   To add a charge to a family's account click the **Charge** button. The page will appear similar to Figure 11. Then specify the type of charge, date, and any other pertinent information about the charge and click **OK** to save the charge. The click **Close**.

Figure 11:

Adding a charge for a family

Payment   To record a payment to a family's account, click the **Payment** button. The page will appear similar to Figure 12. Then specify the type of payment, date, and any other pertinent information about the payment and click **OK** to save the charge. By specifying the payment type "Fee" you may choose the specific fee to apply this payment toward. Then click **Close**.

Figure 12:

Entering a Payment for a Family's Account

Refund   To record a refund to a family's account, click the **Refund** button. The page will appear similar to Figure 13. Then specify the type of refund, date, and any other pertinent information about the refund and click **OK** to save the charge. Then click **Close**.
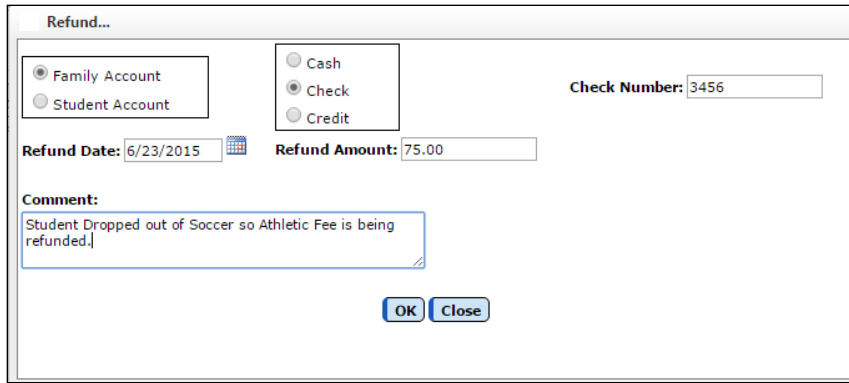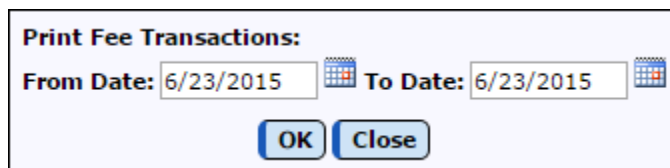
Figure 13:

Entering a Refund for a Family's Account

Print Transactions   To print a list of the family's account transactions, click the **Print Transactions** button. The page will appear similar to Figure 14. Enter the date range for the transactions desired and click **OK**. The page will then appear similar to Figure 15.

Figure 14:

Entering the Date Range for Print Fee Transactions

Figure 15:

Sample Report for Print Fee Transactions

Print Notice   To print a notice that includes the student's current balance as well as a message, click the **Print Notice** button. The page will appear similar to Figure 16. Enter the message and click **OK**. The page will then appear similar to Figure 17.

Figure 16:

Entering a Message for the Print Notice option

Figure 17:

Sample Report for Print Notice Option

Suggested Monthly Payment To enter or edit the suggested monthly payment for the student, simply enter the value in the box for the **Suggested Monthly Payment** and slick the Save button to the right of that box.

Tuition/Fees—Data — Edit Fees

This option may be used to edit and enter the fees to be used for family and student charges.

1. Select Tuition/Fees—Data—Edit Fees. The page will appear similar to Figure 18.

Figure 18:

Edit Fees

Add Record To add a record to the list of fees, click on the **Add Record** link in the upper left corner of the page. Enter the fee name and the costs for regular, reduced, and free and then click on the **Update** link to the left of that record to save the changes.

 Edit To edit a fee record in the list, click on the **Edit** link to the left of the fee name, then make edits as appropriate and click the **Update** link on the left side of the record to save the changes.

Delete To delete a fee record from the list, click on the **Delete** link to the left of the fee name.

Tuition/Fees—Data — Bulk Load Charges

This option may be used to charge multiple students at once.

1. Select <u>Tuition/Fees—Data—Bulk Load Charges</u>. The page will appear similar to Figure 19.

<table>
<tr>
<td>

Sunnyville High School   Day: 1 - 08/24/2015 - Monday   **2015-2016**

This option allows you to bulk load charges based on grade level, or based on students' enrollment in courses containing fees.

Bulk Load by:
- ◉ Grade
- ○ Courses Containing Fees

Grade: 9 ▼

Fees:
- Athletic Fee - $100.00
- IPAD Maintenance Fee - $25.00
- Registration Fee - $75.00

Charge Date: 6/23/2015

Due Date:

Comment:
This is the initial IPAD Maintenance Fee charged to all 9th graders to cover the first instance of repair.

[Load]

</td>
<td>

Figure 19:

Bulk Load Charges

Example: For a Grade

</td>
</tr>
</table>

To charge all students within a grade, click on the **Grade** radio button in the **Bulk Load By** list. Then specify the fee, charge date, due date, and a comment as appropriate. The click the **Load** button in the lower left corner to generate the charges.

To Charge all students registered for courses containing fees, click on the **Courses Containing Fees** radio button in the **Bulk Load By** list. The page will appear similar to Figure 20. Then specify charge date, due date, and a comment as appropriate. The click the **Load** button in the lower left corner to generate the charges.

<table>
<tr>
<td>

Sunnyville High School   Day: 1 - 08/24/2015 - Monday   **2015-2016**

This option allows you to bulk load charges based on grade level, or based on students' enrollment in courses containing fees.

Bulk Load by:
- ○ Grade
- ◉ Courses Containing Fees

Charge Date: 6/23/2015

Due Date:

Comment:
Dear Parents. Any fee associated with a course is contained in this fee.

[Load]

</td>
<td>

Figure 20:

Bulk Load Charges

Example: For Courses Containing Fees

</td>
</tr>
</table>

Establishing Fees For Courses   To edit a course fee, select <u>Schedules – Courses – Edit Course Data</u> and select the **Fees** tab. The page will appear similar to Figure 21. Then add, edit, and or delete fees using the links provided.

Figure 21:

Editing a Course Fee

Tuition/Fees—Data — Import Fee Account Balance from Prior Year

This option may be used to import fee account balances from the prior year.

1. Select Tuition/Fees—Data—Import Fee Account Balances from Prior Year. The page will appear similar to Figure 22.   Then enter the **Effective Date** and click the **Import** button. The page will then appear similar to figure 23.

Figure 22:

Import Fee Account Balances from Prior Year

Figure 23:

After Import, a List of Activity is Displayed

Tuition/Fees—Data — Initialize Family Fee Contact

This option may be used to initialize the family fee contacts. This will create a contact record for the student by setting the student's first primary contact as their fees contact.

1. Select Tuition/Fees—Data—Initialize Family Fee Contact. The page will appear similar to Figure 24.   Then click the **Create Fee Contacts** button to execute this task.
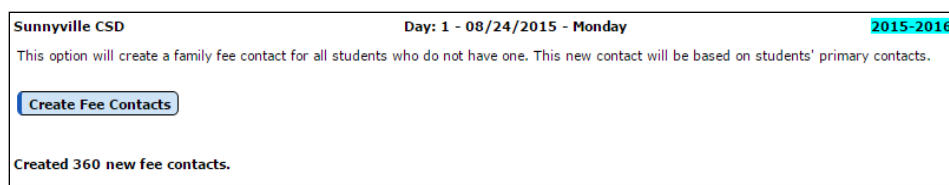
Figure 24:

Initialize Family Fee Contacts

Tuition/Fees—Reports — Print Invoices

This option may be used to print invoices for student and family fees.

1. Select <u>Tuition/Fees—Reports—Print Invoices</u>. The page will appear similar to Figure 25.
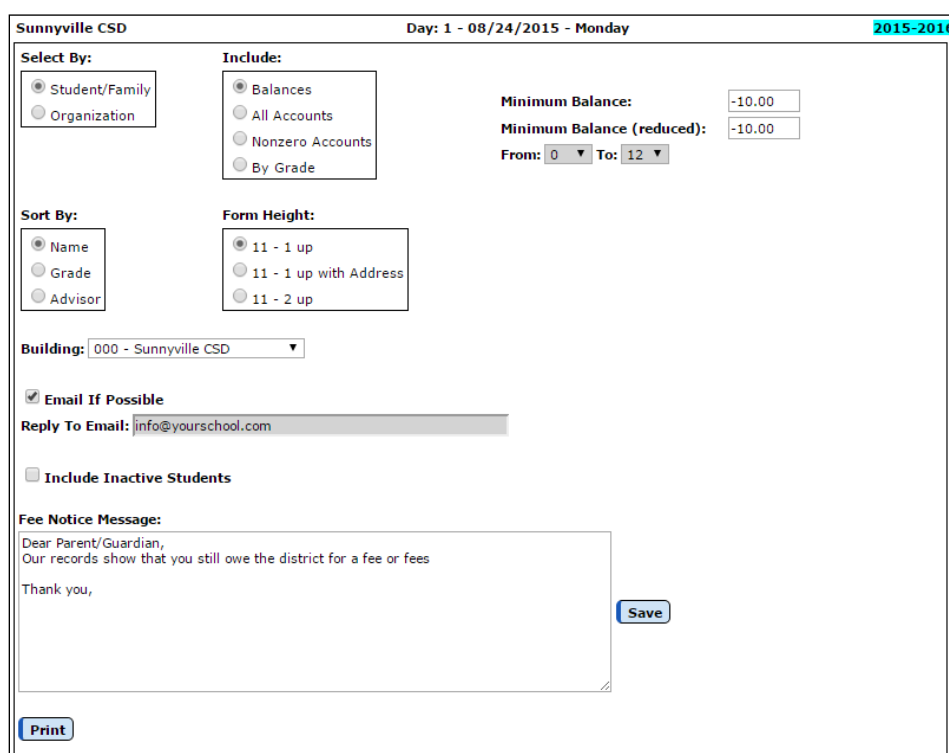
Figure 25:

Print Invoices - Settings

Select By Student/Family or Organization as desired.

Sort By Name, Grade, or Advisor as desired.

Specify the students for whom the invoices are to be printed by specifying the inclusion method of Balances, All Accounts, Nonzero Accounts, or By Grade. The options for this report will vary depending upon the inclusion option specified.

   If **Balances** is specified as the inclusion option, then enter the **Minimum Balance** and **Minimum Balance (Reduced)**.

   If **By Grade** is specified as the inclusion option, then enter the grade or range of grades for the report.

Select Form Height as desired.

Select Building as desired.

Email if Possible   This option may be used to email invoices (where possible) instead of printing them.

> *Note:*   In order for invoices to be emailed the students' primary contacts must have at least one email address entered if the primary contact is checked for In Mailings and In Reports on <u>Edit – Student Data</u>. If the primary contact has multiple email addresses then the invoice would be received at each email address.

> *Note:*   In order for invoices to be successfully emailed, the SMTP server settings must be configured. For more information about configuring your SMTP server. Please refer to Appendix A.

Select whether to Include Inactive Students as desired.

Specify the Fee Notice Message as desired. This message may be saved so that it is available for use with future invoicing.

Print   Click **Print** to begin emailing/printing invoices. A sample invoice is displayed in Figure 26.

| Fee/Tuition Invoice | Sunnyville CSD | 6/23/2015 |

Sunnyville CSD
123 Fourth Street
Sunnyville IA 56789

Alice & Arnold Aasimov
12345 County Road 6
Sunnyville, IA 56789

Family Account Balance: $ -25.00
*Negative balance is amount due

Students with this Fee Contact:
Aasimov, Aaron

Fee Notice: Dear Parent/Guardian,
Our records show that you still owe the district for a fee or fees

Thank you,

Date	Trans Type	Trans Desc	Comment	Student	Course	Due Date	Amount	Balance
06/23/2015			This is the initial IPAD Maintenance Fee charged to all 9th graders to cover the first instance of repair.	Aaron Aasimov			$ -25.00	$ -25.00
06/23/2015	Transfer: (unknown contact)			Aaron Aasimov			$ -25.00	$ 0.00

Figure 26: Sample Fees Invoice

Tuition/Fees—Reports — Fee Balance Sheet

This option may be used to print a balance sheet for student and family accounts.

1. Select Tuition/Fees—Reports—Fee Balance Sheet. The page will appear similar to Figure 27.

Figure 27:

Fee Balance Sheet

Select By Student/Family or Organization as desired.

Specify the students for whom the invoices are to be printed by specifying the inclusion method of Balances, All Accounts, or Nonzero Accounts.

If **Balances** is specified as the inclusion option, then enter the **Minimum Balance** and **Minimum Balance (Reduced)**.

Click **Preview** to preview the report.

Click **Print** to print the previewed report.

Click **Export** to export the report for the specified contact(s) to a CSV (comma-separated) text file.

Tuition/Fees—Reports — Fee Summary

This option may be used to print a fee summary for student and family accounts.

1. Select Tuition/Fees—Reports—Fee Summary. The page will appear similar to Figure 28.

Figure 28:

Fee Summary

Select By Student/Family or Organization as desired.

Specify the date range of the fees to be printed by specifying the **From Date** and **To Date** as desired.

Show Payments Only option may be used to limit the inclusion of only student and family accounts that had a payment during the specified date span.

Click **Preview** to preview the report.

Click **Print** to print the previewed report.

Click **Export** to export the report for the specified contact(s) to a CSV (comma-separated) text file.

Tuition/Fees—Reports — Payment Check

This option may be used to print a payment check for student and family accounts or by organization. This report could be used to detect accounts that are behind on making payments.

1. Select Tuition/Fees—Reports—Payment Check. The page will appear similar to Figure 29.

Figure 29:

Payment Check

Select By Student/Family or Organization as desired.

Specify the date range of the fees to be printed by specifying the **From Date** and **To Date** as desired.

Include Accounts with X or Fewer Payments option may be used to limit the inclusion of only student and family accounts that had a minimum number of payments during the specified date span.
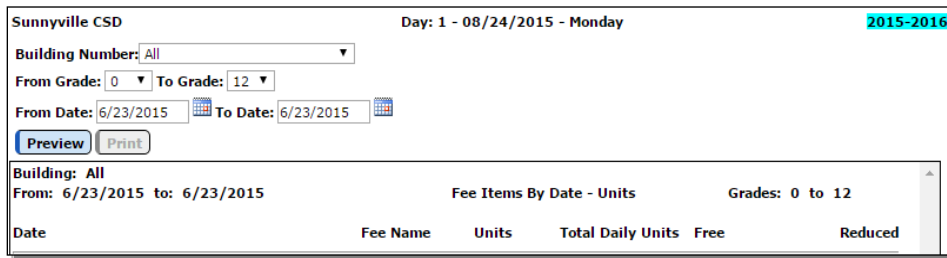
Click **Preview** to preview the report.

Click **Print** to print the previewed report.

Tuition/Fees—Reports — Fees Charged

This option may be used to print a fees charged list.

1. Select <u>Tuition/Fees—Reports—Fees Charged</u>. The page will appear similar to Figure 30.

Figure 30:

Fees Charged

Select Building as desired.

Select the From Grade and To Grade as desired.

Specify the date range of the fees to be printed by specifying the **From Date** and **To Date** as desired.

Click **Preview** to preview the report.

Click **Print** to print the previewed report.

Tuition/Fees—Reports — Fees List

This option may be used to print a fees list.

1. Select <u>Tuition/Fees—Reports—Fees List</u>. The page will appear similar to Figure 31.

Figure 31:

Fees List

Select Building as desired.

Specify the date range of the fees to be printed by specifying the **From Date** and **To Date** as desired.

Click **Preview** to preview the report.

Click **Print** to print the previewed report.

Tuition/Fees—Reports — Fee Payment

This option may be used to print fee payments.

1. Select Tuition/Fees—Reports—Fee Payment. The page will appear similar to Figure 32.

Figure 32:

Fee Payment

Select Fee as desired.

Specify the date range of the fees to be printed by specifying the **From Date** and **To Date** as desired.

Click **Preview** to preview the report.

Click **Print** to print the previewed report.

Appendix A

Email Setup – Admin Options

In order to reports to be successfully emailed, the SMTP server settings must be configured by selecting <u>File – Administrator Options</u> and entering the SMTP server address and other appropriate settings. If you have any questions about how to configure JMC Next Gen for sending email please contact JMC technical support at 800-524-8182.

> *Note:* Once you have configured the email settings correctly you would not have to change them again unless something changes with your email server, internet service provider…

> *Note:* The configuration for sending email from JMC Next Gen must be done for each building.

Sunnyville High School   **Day: 177 - 05/21/2015 - Thursday**

Security:
☐ Allow users to save passwords at login time

School Settings:
Number of periods in a day: 7 ▾
Days in Cycle: 2 ▾

Day Labels:
1. 1
2. 2

Sort schedules by:
◉ Semester
◯ Trimester
◯ Quarter

Sending Email:

SMTP server: smtp.onlinejmc.com:25

Send From
Email
Address:

☐ SMTP server requires secure connection (SSL)

☑ SMTP server requires authentication
Account ID: sunnyville@onlinejmc.com
Password: password

Figure A1:

Configuring JMC Next Gen for emailing reports on Administrator Options page

Student Photos:
Import Student Photo Linking File

Set Usernames and Passwords:
Set random student and parent passwords

Phone Settings:
Phone Dialer Settings
Initialize Contact Phone Numbers

[Update]