



NEXT GEN DOCUMENTATION ~TUITION / FEES~

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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 [Schedules – Student – Edit Schedules](#).

Sunnyville High School Day: 177 - 05/21/2015 - Thursday 2014-2015 Logout

Grade: All Find: <- ->

Student ID: 569 Student Name: Adams, Carla Grade: 7

Add Courses... Print Save Midterms

Lock	Section	Course	Q1	Q2	H1	H2	T1	H3	S1	H4	T2	Q3	Q4	H5	H6	T3	S2	Ex	Yr	Com
-	S1.1 En...	567 BAND JH	X																	
-	S1.2 En...	573 MATH 7	X																	
-	S1.255 ...	560 GUIDED STUDY 7	X																	
-	S1.3 En...	570 SOCIAL 7	X																	
-	S1.4 En...	571 SCIENCE 7	X																	
-	S1.5 En...	575 PE/HEALTH 7	X																	
-	S1.7 En...	569 ENGLISH 7	X																	
-	S2.1 En...	567 BAND JH	X																	
-	S2.2 En...	573 MATH 7	X																	
-	S2.255 ...	560 GUIDED STUDY 7	X																	
-	S2.3 En...	570 SOCIAL 7	X																	
-	S2.4 En...	571 SCIENCE 7	X																	
-	S2.5 En...	575 PE/HEALTH 7	X																	
-	S2.7 En...	569 ENGLISH 7	X																	

Quick Links:

- Student Data
- Student Scope
- Print Schedule
- Print Transcript
- Delete All Courses
- Copy Schedule From Another Student

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 [Edit – Student Data](#) and [Grading – Entry – Edit Grades](#).

Mozilla Firefox
http://localhost:53212/StudentScope.aspx

Student ID: 569 **Name:** Adams, Carla **Grade:** 7 **Gender:** F **StateID:** 1234567890123 **Stu Email:** 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	1	2	3	4	5	6	7
No absences or tardies for this student.	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	10/1/2001 - (0Y 2M)	Full	<input type="checkbox"/>
Diphtheria, Tetanus, and Pertussis	12/3/2001 - (0Y 4M)	Full	<input type="checkbox"/>
DTaP	2/4/2002 - (0Y 6M)	Full	<input type="checkbox"/>
Diphtheria, Tetanus, and Pertussis	10/28/2002 - (1Y 3M)	Full	<input type="checkbox"/>
DTaP	9/19/2005 - (4Y 1M)	Full	<input type="checkbox"/>
Diphtheria, Tetanus, and Pertussis	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.

JMC Demo District Day: 137 - 01/30/2017 - Monday 2016-2017

Grade: All Find: <- ->

Student Name: Julie Freid Grade: 10 Current Balance: \$ 0.00
Student ID: 56

Organization Contact Name:

Students with this Fee Contact:

Suggested Monthly Payment: 0.00 Save

Charge... Payment... Refund... Print Transactions Print Notice

Deleted	Date	User	Trans Type	Trans Desc	Comment	Course	Due Date	Amount	Balance
<input type="checkbox"/>	06/09/2016	JMCAADMIN	Carryover from last year					\$ 0.00	\$ 0.00

Fee Records from Prior Years:

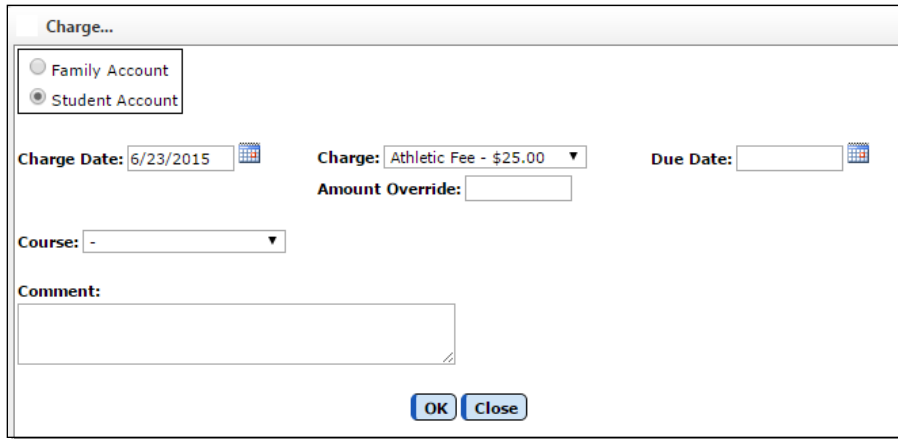
Date	User	Trans Type	Trans Desc	Comment	Course	Due Date	Amount
07/09/2015	JMCAADMIN	Carryover from last year					\$ 0.00
07/15/2014	JMCAADMIN	Carryover from last year					\$ -75.00
09/27/2013	JMCAADMIN	Charge	Book Fees				\$ -15.00
07/31/2013	JMCAADMIN	Charge	Physics Fee				\$ -50.00
07/31/2013	JMCAADMIN	Charge	YearBook Fee				\$ -25.00

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.



Charge...

☐ Family Account
☒ Student Account

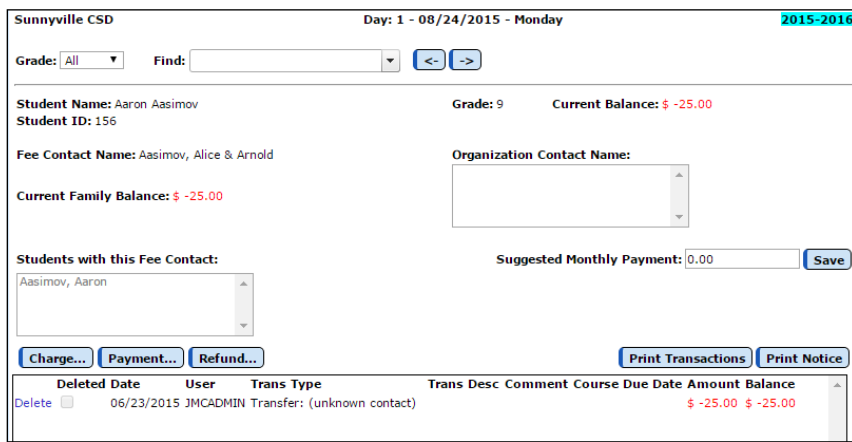
Charge Date: 6/23/2015 
 Charge: Athletic Fee - \$25.00 ▼
 Due Date: 

Amount Override:

Course: - ▼

Comment:

Figure 2:
Adding a charge for a student



Sunnyville CSD Day: 1 - 08/24/2015 - Monday 2015-2016

Grade: All ▼ Find: <- ->

Student Name: Aaron Aasimov
 Student ID: 156
 Grade: 9 Current Balance: \$ -25.00

Fee Contact Name: Aasimov, Alice & Arnold
 Organization Contact Name:

Current Family Balance: \$ -25.00

Students with this Fee Contact:

Suggested Monthly Payment: 0.00

Deleted	Date	User	Trans Type	Trans Desc	Comment	Course	Due Date	Amount	Balance
<input checked="" type="checkbox"/>	06/23/2015	JMCADMIN	Transfer: (unknown contact)					\$ -25.00	\$ -25.00

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

Payment...

☒ Cash
☐ Check
☐ Credit

Payment Date: 1/26/2017
 Payment Amount:
 Check Number:
 Payment Type:
☐ Balance
☒ Fee

Student Fees:
 06/06/2016 Book Fees \$-15.00 (\$0.00)

Comment:

OK Close

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**.

Refund...

☒ Family Account
☐ Student Account

☐ Cash
☒ Check
☐ Credit

Refund Date: 6/23/2015
 Refund Amount: 75.00
 Check Number: 3456

Comment:
 Student Dropped out of Soccer so Athletic Fee is being refunded.

OK 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.

Print Fee Transactions:

From Date: 6/23/2015
 To Date: 6/23/2015

OK Close

Figure 6:

Entering the Date Range for Print Fee Transactions

6/23/2015

Sunnyville CSD Day: 1 - 08/24/2015 - Monday 2015-2016

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

Current Family/Org Balance: \$ -25.00 From: 6/22/2015 To: 6/24/2015

Deleted	Date	User	Trans Type	Trans Desc	Comment	Student	Course	Due Date	Amount	Balance
<input type="checkbox"/>	06/23/2015	JMCADMIN			This is the initial IPAD Maintenance Fee charged to all 9th graders to cover the first instance of repair.	Aaron Aasimov			\$ -25.00	\$ 0.00
<input type="checkbox"/>	06/23/2015	JMCADMIN	Refund -	Check # 3456	Student Dropped out of Soccer so Athletic Fee is being refunded.	Aaron Aasimov			\$ -75.00	\$ 25.00
<input type="checkbox"/>	06/23/2015	JMCADMIN	Payment -	Check # 1234		Aaron Aasimov			\$ 100.00	\$ 100.00

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.

Fee Notice Message:

Dear Mrs. Jones,

Our records show that you still owe the district for an athletic fee. Thank you.

OK Close

Figure 8:
Entering a Message for the Print Notice option

Fee/Tuition Invoice Sunnyville CSD 6/23/2015

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

Fee Notice: Dear Mrs. Jones,

Our records show that you still owe the district for an athletic fee. 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
06/23/2015	Carryover from last year			Aaron Aasimov			\$ 0.00	\$ 25.00

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.

Fee/Org Contact:
Adamsking1, Dad
324 1st St.
PO Box 34111111
Anywhere, IA 45627

Students with this Fee/Org Contact:
Freed, Paul
Demo, Caley

Current Family/Org Balance: \$ -199.00

Suggested Monthly Payment: 0.00 **Save**

Charge... **Payment...** **Refund...** **Print Transactions** **Print Notice**

Deleted	Date	User	Trans Type	Trans Desc	Comment	Student	Course	Due Date	Amount	Balance
<input type="checkbox"/>	06/16/2016	JMCADMIN	Carryover from last year						\$ -164.00	\$ -184.00
<input checked="" type="checkbox"/>	06/09/2016	JMCADMIN	Carryover from last year						\$ -164.00	
<input type="checkbox"/>	06/08/2016	JMCADMIN	Payment - Check # 1234						\$ 15.00	\$ -20.00
			Payment - Book Fees						\$ 15.00	
<input type="checkbox"/>	06/07/2016	JMCADMIN	Refund - Check # 12345						\$ -20.00	\$ -35.00
<input type="checkbox"/>	06/06/2016	JMCADMIN	Charge	Book Fees		Paul Freed		07/15/2016	\$ -15.00	\$ -15.00

Fee Records from Prior Years:

Date	User	Trans Type	Trans Desc	Comment	Course	Due Date	Amount
04/14/2016	JMCADMIN	Charge	Gala Donation				\$ -100.00
04/11/2016	JMCADMIN	Charge	Elm Reg Fee			04/20/2016	\$ -40.00
03/01/2016	JMCADMIN	Payment - Cash					\$ 24.00
12/17/2015	JMCADMIN	Charge	Gala Donation				\$ -100.00
12/17/2015	JMCADMIN	Payment - Cash					\$ 100.00
12/17/2015	JMCADMIN	Payment - Gala Donation					\$ 100.00
12/17/2015	JMCADMIN	Payment - Cash					\$ 15.00
12/17/2015	JMCADMIN	Payment - Book Fees					\$ 15.00

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:

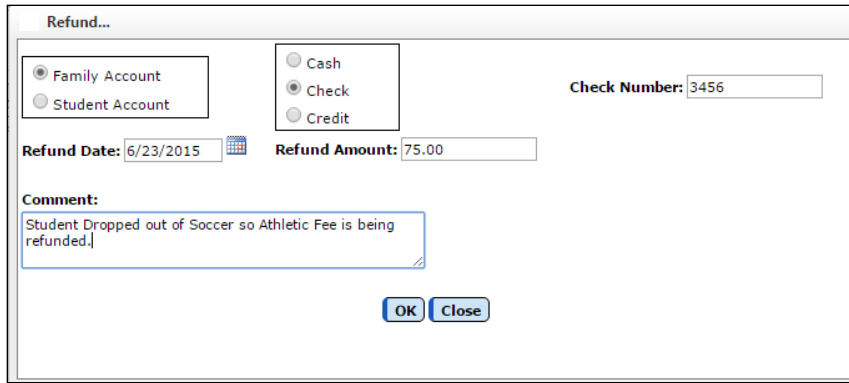
Adding a charge for a family

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**.



Refund...

☒ Family Account
☐ Student Account

☐ Cash
☒ Check
☐ Credit

Check Number: 3456

Refund Date: 6/23/2015 Refund Amount: 75.00

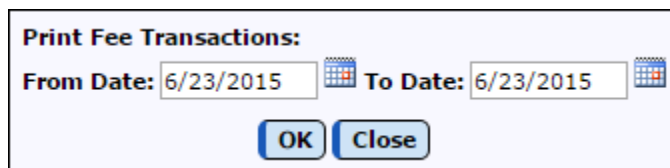
Comment:
Student Dropped out of Soccer so Athletic Fee is being refunded.

OK 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.



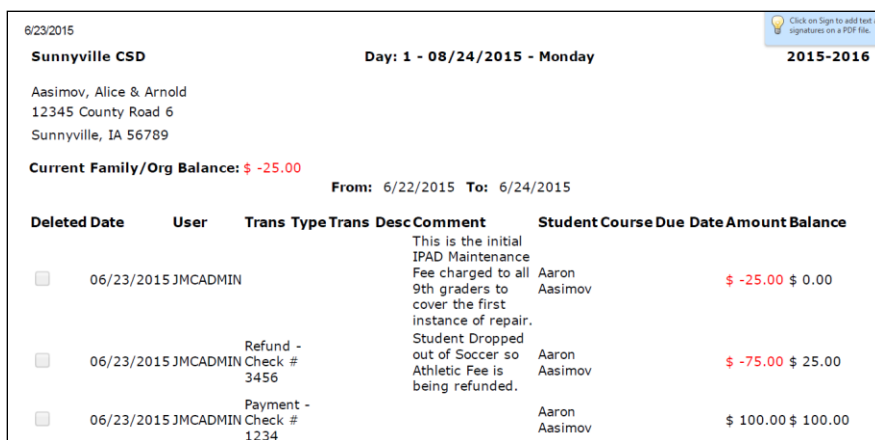
Print Fee Transactions:

From Date: 6/23/2015 To Date: 6/23/2015

OK Close

Figure 14:

Entering the Date Range for Print Fee Transactions



6/23/2015

Sunnyville CSD Day: 1 - 08/24/2015 - Monday 2015-2016

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

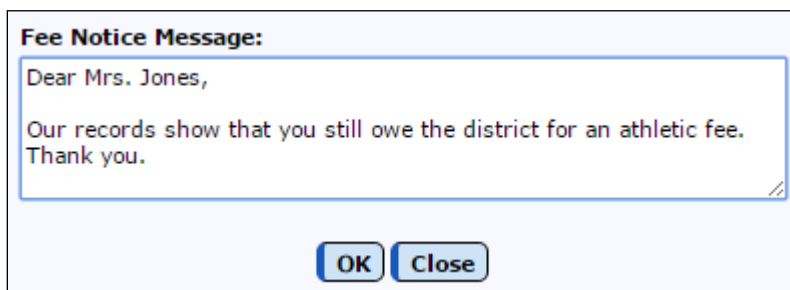
Current Family/Org Balance: \$ -25.00 From: 6/22/2015 To: 6/24/2015

Deleted Date	User	Trans Type	Trans Desc	Comment	Student Course	Due Date	Amount	Balance
<input type="checkbox"/>	06/23/2015 JMCADMIN			This is the initial IPAD Maintenance Fee charged to all 9th graders to cover the first instance of repair.	Aaron Aasimov		\$ -25.00	\$ 0.00
<input type="checkbox"/>	06/23/2015 JMCADMIN	Refund -	Check # 3456	Student Dropped out of Soccer so Athletic Fee is being refunded.	Aaron Aasimov		\$ -75.00	\$ 25.00
<input type="checkbox"/>	06/23/2015 JMCADMIN	Payment -	Check # 1234		Aaron Aasimov		\$ 100.00	\$ 100.00

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.



Fee Notice Message:

Dear Mrs. Jones,

Our records show that you still owe the district for an athletic fee. Thank you.

OK Close

Figure 16:

Entering a Message for the Print Notice option

Fee/Tuition Invoice

Sunnyville CSD
123 Fourth Street
Sunnyville IA 56789

6/23/2015

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

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

Fee Notice: Dear Mrs. Jones,

Our records show that you still owe the district for an athletic fee.
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
06/23/2015	Carryover from last year			Aaron Aasimov			\$ 0.00	\$ 25.00

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 click 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.

Sunnyville CSD

Day: 1 - 08/24/2015 - Monday

2015-2016

[Print](#)

[Add Record](#)

	Name	Cost	Reduced	Free
Edit Delete	Athletic Fee	\$100.00	\$75.00	\$25.00
Edit Delete	IPAD Maintenance Fee	\$25.00	\$25.00	\$25.00
Edit Delete	Registration Fee	\$75.00	\$75.00	\$75.00

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 Tuition/Fees—Data—Bulk Load Charges. The page will appear similar to Figure 19.

The screenshot shows the 'Bulk Load Charges' interface for Sunnyville High School. At the top, it says 'Day: 1 - 08/24/2015 - Monday' and '2015-2016'. Below this is a sub-header 'Bulk Load by:' with two radio buttons: 'Grade' (selected) and 'Courses Containing Fees'. Under 'Grade', there is a dropdown menu set to '9'. To the right, there are input fields for 'Charge Date' (6/23/2015) and 'Due Date'. Below these is a 'Comment' text area containing the text: 'This is the initial IPAD Maintenance Fee charged to all 9th graders to cover the first instance of repair.' On the left, under 'Fees:', there is a list of fees: 'Athletic Fee - \$100.00', 'IPAD Maintenance Fee - \$25.00' (highlighted), and 'Registration Fee - \$75.00'. At the bottom left is a 'Load' button.

Figure 19:

Bulk Load
Charges

Example:
For a
Grade

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. Then 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. Then click the **Load** button in the lower left corner to generate the charges.

The screenshot shows the 'Bulk Load Charges' interface for Sunnyville High School, similar to Figure 19 but with the 'Courses Containing Fees' radio button selected. The 'Charge Date' is 6/23/2015 and the 'Due Date' is empty. The 'Comment' text area contains the text: 'Dear Parents. Any fee associated with a course is contained in this fee.' The 'Load' button is at the bottom left.

Figure 20:

Bulk Load
Charges

Example:
For
Courses
Containing
Fees

Establishing Fees For Courses To edit a course fee, select Schedules – Courses – Edit Course Data 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

StudentID	Student Name	Grade	Status	Balance
156	Aasimov, Aaron	9	\$ 0.00 DEPOSITED	\$-25.00
10223	Adler, Cole	12	\$ 0.00 DEPOSITED	\$0.00
16002	Albertson, Lynette	12	\$ 0.00 DEPOSITED	\$0.00
16003	Alejandro, Alex	12	\$ 0.00 DEPOSITED	\$0.00

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.

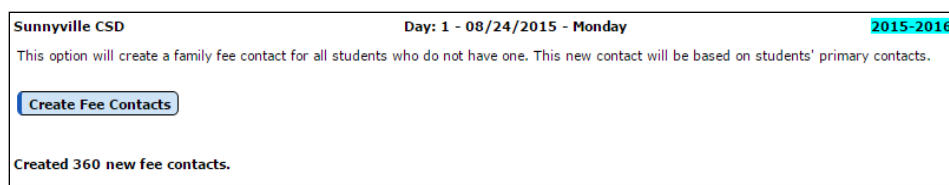


Figure 24:
Initialize
Family Fee
Contacts

Tuition/Fees—Reports — Print Invoices

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

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

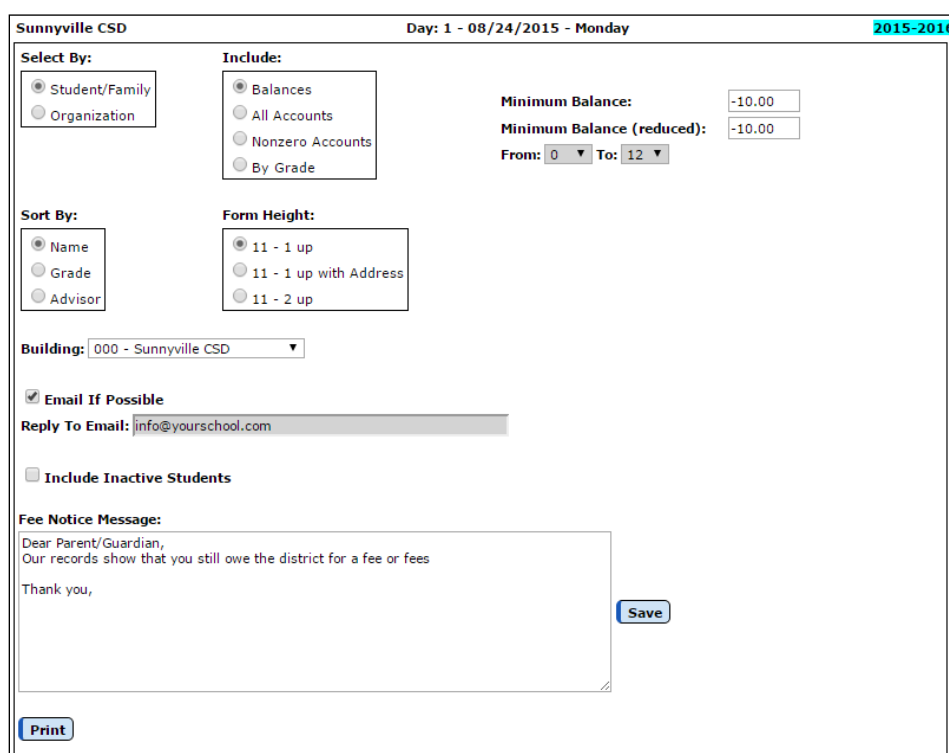


Figure 25:
Print
Invoices -
Settings

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 Edit – Student Data. 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 123 Fourth Street Sunnyville IA 56789		6/23/2015				
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.

ID	Balance	Name
Family	\$0.00	Aasimov, Alice & Arnold
156	\$-25.00	Aasimov, Aaron
Family	\$-25.00	Allen, Harold & Dorothy
19001	\$0.00	Allen, Jack
Family	\$-25.00	Baker, Wally & Cass

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.

ID	Name	BegBal	Charges	Payments	Check#	EndBal
Family	Aasimov, Alice & Arnold	\$0.00	\$0.00	\$25.00		\$0.00
156	Aasimov, Aaron	\$0.00	\$0.00	\$0.00		\$-25.00
Family	Adler, Bob and Babette	\$0.00	\$0.00	\$0.00		\$0.00
10223	Adler, Cole	\$0.00	\$0.00	\$0.00		\$0.00
Family	Alberke, Tim S. III	\$0.00	\$0.00	\$0.00		\$0.00

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.

ID	Name	Payments
----	------	----------

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.

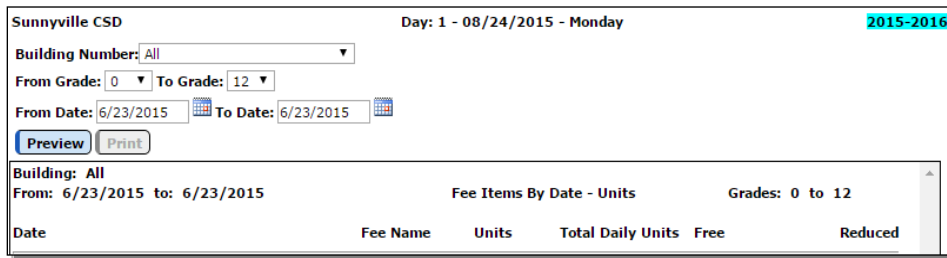
Click **Preview** to preview the report.

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 Tuition/Fees—Reports—Fees Charged. The page will appear similar to Figure 30.



Sunnyville CSD Day: 1 - 08/24/2015 - Monday 2015-2016

Building Number: All

From Grade: 0 To Grade: 12

From Date: 6/23/2015 To Date: 6/23/2015

Preview Print

Building: All
From: 6/23/2015 to: 6/23/2015 Fee Items By Date - Units Grades: 0 to 12

Date	Fee Name	Units	Total Daily Units	Free	Reduced
------	----------	-------	-------------------	------	---------

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 Tuition/Fees—Reports—Fees List. The page will appear similar to Figure 31.

Figure 31:
Fees List

Sunnyville CSD Day: 1 - 08/24/2015 - Monday 2015-2016

Fee: All

From Date: 6/21/2015 To Date: 7/3/2015

Preview Print

Fee List Report
From: 6/21/2015 to: 7/3/2015

Fee

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.

JMC Demo District Day: 135 - 01/26/2017 - Thursday 2016-2017

Fee: All

From Date: 7/1/2016 To Date: 1/26/2017

Preview Print

Fee List Report
From: 7/1/2016 to: 1/26/2017

Fee

Book Fees	Contact	Student	Grade	Transaction Date	Due Date	Amount	Payment
FEEs, TEST		Aasimov , Abbie	6	01/11/2017		\$-15.00	
TestNoState, TestNoState		test, test	12	01/11/2017		\$-15.00	

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 for reports to be successfully emailed, the SMTP server settings must be configured by selecting File – Administrator Options 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

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](#)

Figure A1:

Configuring
JMC Next Gen
for
emailing reports
on
Administrator
Options page