

Problem Accounts (Families)

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There may be instances where you find it necessary to 'flag' a family/account as a **Problem Account**. A family flagged as a Problem Account can still log in to their Parent Portal to make payments and review their account.

Flag a Problem Account

1. Locate the *Family* record.
 - o Go to the **Families** (menu) > **All Families** to locate the family.
 - o Use the global search at the top of each page to locate the family.
2. Click the **Summary** tab.
3. Select the checkbox for **Problem Account**.
4. Click **Save Changes**.

The screenshot shows the 'Family: Owers' account page. At the top, there are buttons for 'RETURN', 'SAVE CHANGES', and 'DELETE'. Below these are several tabs: 'Make Sale/Post Fees', 'Payment/Credit', 'Refund', 'Statement', 'Add Student', 'Add Contact', 'Archive Family', 'Family Name', 'Email', 'Email Schedules', 'Submit Absences', and 'Merge Family'. The 'Misc' tab is highlighted in red. Below the tabs are sections for 'Primary Contacts' and 'Students'. The 'Current Balance' is 145.00, and the 'Problem Account' checkbox is checked. A callout box points to the 'Misc' tab with the text: 'When a family account is marked as a Problem Account the Misc tab turns red.' Another callout box points to the 'Problem Account' checkbox with the text: 'When a family account is marked as a Problem Account it will display as red on the Summary tab.'

Contacts	Type	Home Phone	Work Phone	Cell Phone	Email	Bill	Login	Portal UserID	Last Login
David Owers	Father	(704) 555-7721		(704) 555-7721	dowers@email.com	Yes	Yes	dowers@email.com	

First Name	Last Name	Active	Gender	Birth Date	Age	Grade	Fixed Fee	Enrolled Classes	F. Enroll	Wait
Ashlee	Owers	Enroll	Y	Female	10/22/2007	13 yrs, 4 mths		Tumbling L2 - Mon 6pm(Stephanie A.)(67.50)	0	

Current Balance 145.00 Problem Account

Location: SUP
Status: Active
Registration Date: 8/23/2019
Home or Primary Phone: (704) 555-7721

Locate Problem Accounts

To identify Problem Account families, go to the *Families (menu) > All Families* and filter for *Financial Details > Problem Accounts > Is Problem Account?* In addition, any family marked as a problem account will be displayed in **red** in the *All Families* grid or in the list of families located using *Global Search Results*.

Prevent Problem Families from Enrolling

When a family is flagged as a Problem Account, it is possible to prevent them from enrolling in classes and events via the Parent Portal.

Go to the **Gear icon > Settings > Parent Portal > Settings(tab) > Class Enrollment Settings > Prevent Problem Families from enrolling in Classes and Events** and select the checkbox. **Save Changes**. The family will continue to have access to the Parent Portal but won't be able to enroll. Parents will see this message, *"There is a problem with your account and you cannot enroll at this time, please contact us directly."*



To deny their access to the Parent Portal, open their Contact record, and deselect the **Allow to Login to Parent Portal** field in the Portal Information area.
