

Post Annual Fees

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From the *Transactions (menu) > Post Transactions > Annual Fees* can be used to post any type of annual fee (registration, membership, insurance, etc.) to existing families or students.

You have the option to:

- **Post fee per Family** based on the *Family Registration Month*. A family's registration date is the date they registered with your facility, either via a Jackrabbit User (in-house) or through online registration; it is displayed on the *Summary* tab of their *Family* record.
- **Post fee per Student** based on the *Student Start Month*. A student's start date is the date they were first added to the *Family* record in Jackrabbit; it is displayed on the *Summary* tab of the *Student* record.
- **Post fee per Student per Class** based on the *Student Start Month*.

Use the **Search Criteria** to narrow the list of people who will be included in the batch and have the fee posted to their accounts.

Based on the criteria selections in the above example, a fee would be posted to families with a *Membership Type of Recreational* for each class their students who started in December and *actively enrolled* in for the *Winter 2023* session.

The **Transaction Details to Post** section lets you choose the type of fees you want to post and what details you want to apply to the transactions.

If you are posting per family, you will enter the fee amount for a family. If you are posting per student or per student per class, you will enter the fees for the first student, second student, and third student. The fee for the third student is used for the fourth, fifth, etc. students in the family unless a maximum fee per family is designated. If a maximum fee exists, the fee will post for each student until that maximum is reached. If the maximum is reached, it will be posted to the family in one transaction versus posting each student amount individually.

By default, Post Annual Fees will exclude transactions for a family with previously posted fees with an exact match on:

- Transaction Date
- Transaction Type
- Transaction Amount (per Family, per Student, or per Student-Class)

If you have chosen to post fees per student or by student per class, the transaction must also match the student name (this would mean that the originally posted transaction would have to have the student listed in the student section of the transaction).

Entering dates in the Duplicate Check Date From/Through fields allows you to also exclude duplicate fees for a family/student for a specified date range instead of the exact transaction date. This searches

the date range and matches the type, amount, per-student fees, and student name.

If you would like the Family Registration Date or Student Start Date to act as a 'due date' for next year's fees, select Yes to Optionally, Advance Registration Date By 1 year. **Note:** To keep a record of their actual registration/start date, consider adding those dates to the Notes field on the Misc tab.

You can preview the fees before you commit to posting them!

The Preview Annual Fees page provides transaction counts and the option to remove a family, or student, from the batch. The fees are not posted to families until the **Post Fees** button is selected.

If annual fees are posted in error, use Transactions > Delete Transactions to delete. See [Delete Transactions](#) for more information on deleting a fee.
