Post Annual Fees

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The Post Annual Fees page allows you to post any type of annual fee (registration, membership, insurance, etc.) to existing families or students. To access this page, go to the **Transactions** menu > **Post Transactions** > **Annual Fees**.

You have the option to:

- *Post fee per* Family/Account 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 the 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*.

Search Criteria

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.

- For example, based on the criteria selected in the image above, a fee would be posted to families with a *Membership Type* of Annual for each class their students, who started in August, are actively enrolled in for the 2024-2025 session.

Transaction Details

The *Transaction Details to Post* section lets you choose the type of fees to post and the details to apply to the transactions. You can preview the fees before you commit to posting them.

Click on the image to view it in full size in a new window.

- If you are posting fees per Family/Account, enter the fee amount for a family in the *Family/Acct Fee* field.
- If you are posting fees per Student or Student Per Class, enter the fees in the *Student Fees* field 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/Acct* amount is designated. If a maximum fee exists, the fee will be posted 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's amount individually.
- If you would like to advance the *Registration Date* (Family record > Summary tab) or *Student Start Date* (Student record > Summary tab) by one full year, select Yes in the *Optionally, Advance Registration Date By 1 year?* field. Note: To keep a

record of their actual registration/start date, consider adding those dates to the *Notes* field on the Misc tab of the Family record.

When using the *Maximum Fee per Family/Acct*, the fees for a family must be posted at the same time for the maximum amount to be calculated. The function cannot look back at previously posted fees to calculate the maximum. Therefore, if students enroll at different times, leave the *Maximum Fee per Family/Acct* field blank, as it does not apply.

Duplicate Detection

Duplicate transaction detection prevents the posting of duplicate fees by automatically checking for matching transactions based on specific criteria.

- By default, Post Annual Fees will exclude duplicate transactions for a family of previously posted fees with an exact match on:
  - Transaction Date
  - Transaction Type
  - Transaction Amount (per Family, Student, or Student-Class)
- If you are posting fees per Student or Student Per Class, the transaction must also match the student's name (this would mean that the student would have to be listed in the student section of the originally posted transaction).
- If you would also like to exclude duplicate fees for a family/student for a specified date range instead of the exact transaction date, use the *Duplicate Check Date From/Through* fields. This searches the date range and matches the type, amount, per-student fees, and student name.

Preview Annual Fees

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. Check out our help article **Delete Multiple Transactions at Once** for more information on deleting a fee.