

The Post Tuition Fees Feature - Your #1 Tool for Tuition Posting

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Post Tuition Fees, located under the *Transactions* menu, is a powerful tool that allows you to post tuition fees to more than one family at a time. It can also be used to post tuition to a single family or to a specific class.

The tuition fees can be posted immediately (**Post Now**) or scheduled to post at a future date and time (**Post Later**).

The flexibility of the Post Tuition Fees feature makes it an essential tool for posting tuition!

Jackrabbit does the heavy lifting and calculates all discounting and prorating according to your [Tuition Settings](#).

Prevent tuition fee posting errors with Jackrabbit's [Advanced Detection](#).

Automate! Schedule the posting of your tuition fees. Learn more about [Automated Tuition Fee Posting](#).

Permissions control a User's ability to view certain data or perform certain actions.

Before moving forward review [User Permissions - Post Tuition Fees to Multiple Families at Once](#).

The Post Tuition Fees Process

The Post Tuition Fees feature can be used to post to classes with either [Tuition Billing Method](#) (By Class Fee or By Total Hours).

Some settings are different between the two methods, but the process is the same (learn about each setting/criteria below):

1. Use the **Post Setting** to determine whether you want to post fees now or post fees later.
2. Select your **Billing Settings** (Billing Method, Billing Cycle, and Tuition Posting Date).
3. Choose your **Class Criteria**, **Family Criteria**, **Multi-Student Discount Settings** (By Total Hours only), and **Additional Settings**. Add **Transaction Details** and define any **Additional Discount** you may want to apply to the posting.
4. Set your preferences for **Advanced Detection**.
5. Preview the tuition fees and make any changes needed. Learn more about the [Preview Tuition Fees page](#).
6. **Post Now** or **Post Later** based on the *Post Setting* you selected in Step 1.

Before using Post Tuition Fees, you must first review and define your [Tuition Settings](#) to tell Jackrabbit what discounts and/or prorating apply to the fees.

Post Tuition Fees Settings & Criteria Explained

Expand each section to learn more about the settings and criteria involved in the Post Tuition Fees process.

[Expand/Collapse All](#)

Post Setting

<p>Post Now</p>	<p>Use the Post Now button to post tuition fees to your families on the spot. The fees are posted to the families' accounts immediately, and the current balance on their accounts is updated to include these fees. The tuition fees will also be included in the Dashboard Aged Accounts total, in the 0-30 days column.</p> <p>If Post Now is used to post fees with a future date, they will still be included in the current balance on the family record and will still be included in the Dashboard Aged Accounts 0 - 30 days column. Instead, schedule the fees to Post Later.</p>
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Post Later	<p>Use the Post Later button to schedule the tuition fees to be posted at a later date, optionally creating the fee posting as a recurring task. The fees will not be posted to families' accounts until the date they are scheduled to post and the Dashboard Aged Accounts will not include the fees until then. Set the date you want the scheduled task to start; this date can be edited later in the Task Scheduler if needed.</p> <p>Learn more about Automated Tuition Posting.</p>
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Billing Settings

Post to classes with this Billing Method	<p>Choose whether to post to classes with a Billing Method of By Class Fee or to classes that are billed By Total Hours. If your classes are a mix, and you use both Billing Methods, they will need to be posted separately.</p> <ul style="list-style-type: none">• The Billing Method for a class is defined on the <i>Summary</i> tab of the <i>Class</i> record.• Learn more about Billing Methods.
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<p>Post total hours per (By Total Hours only)</p>	<p>Choose whether to calculate total hours fees based on the total hours of all students in the family (Post total hours per Family) or by the total hours of each student separately (Post total hours per Student).</p> <p>If you opt to total the hours separately for each student, you'll be given the option to add multi-student discounts further in the process in the <i>Multi-Student Discount Settings</i> section.</p> <p>Example</p> <ul style="list-style-type: none"> • Fee Schedule • Student #1 is currently enrolled in two 1 hour classes per week (=2 hours) • Student #2 is currently enrolled in one 1 hour class per week (1 hour) <p>Total hours by student:</p> <ul style="list-style-type: none"> • Student #1 is charged \$90 (fee for 2 hours) • Student #2 is charged \$50 (fee for 1 hour) • Total family tuition is \$140 <p>Total hours by family:</p> <ul style="list-style-type: none"> • Total hours taken by both students is 3 • Total family tuition is \$130(fee for 3 hours) <p>Learn more about the Fee Schedule used for posting tuition by total hours.</p>
<p>Post tuition to classes with this Billing Cycle</p>	<p>The Billing Cycle is how often you post tuition fees; it defines the range of days your families are billed for. Note: If you bill By Total Hours, you are limited to one Billing Cycle for those classes, and therefore, the <i>Billing Cycle</i> field in the <i>Post Tuition Fees - Billing Settings</i> is disabled.</p> <p>When you choose to post your fees later with the Post Later option, the only Billing Cycles available are Monthly and Weekly. Custom cycles and By Session Date cycles cannot be automated.</p> <ul style="list-style-type: none"> • The Billing Cycle for a class is assigned on the <i>Summary</i> tab of the <i>Class</i> record. • Learn more about Billing Cycles.

The options that appear in the Billing Cycle start date drop-down list depend on the type of Billing Cycle selected and the day it starts:

- When you use Weekly, Monthly, or Custom Billing Cycles, you must select a billing cycle start date from the drop-down.
- For By Session Date cycles, the Billing Cycle start date field is automatically filled with the first day of the session.

When posting fees immediately (Post Now), your options will be as follows:

Type of Billing Cycle	Options
Weekly	Select from 10 previous cycles or 15 future cycles, including the current cycle.
Monthly or Custom	Select from 3 previous cycles or 12 future cycles, including the current cycle.
By Session Dates	Select a session from the list.

Billing Cycle start date

When you opt to **Post Later**, you will only see two cycles to choose from, the current Billing Cycle and the next Billing Cycle.

- The start dates of the Weekly, Monthly, and Custom Billing Cycles are defined in the *Tuition Billing Settings* under the Gear icon > *Settings* > *Tuition & Discounting*)
- The start dates of By Session Date cycles are defined in the *Drop-down List Editor for Class Sessions* (Gear icon > *Settings* > *General*).

<p>Transaction date</p>	<p>The Transaction date is the date that will be stamped on each tuition fee that is posted in the batch; it is not the date the posting was done.</p> <p>Example - Fees posted on August 5th with a Transaction date of September 1st will all be stamped with the September 1st date.</p> <p>When you select the current Billing Cycle, the Transaction date will default to the current date. When previous or future cycles are selected, the Transaction date defaults to the start date of the Billing Cycle.</p> <p>The Transaction date field is editable and does not impact when your Billing Cycle starts. Changing the Transaction date in this workflow will not change your Billing Cycle start date.</p> <p>If you have chosen to post these fees at a later date (Post Later) and are creating a recurring task, the Transaction date determines the Transaction date of subsequent postings, e.g., if the 1st of the month is chosen for a monthly billing task, the next time the task runs the Transaction date will be the 1st of the next month. These dates can be customized in the task scheduler. Learn more about Automated Tuition Posting.</p>
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When your Billing Settings selections have been made, a Posting Summary will display giving you a confirmation of the settings that will be applied to the posting.

Class Criteria

In addition to the Billing Method and Billing Cycle selected in the *Post Tuition Fees - Billing Settings*, the **Class Criteria** can be used to further narrow down the list of classes to be included in the posting.

<p>Class Search</p>	<p>Use the Class Search field to post tuition fees to a specific class. The classes that are available in the search depend on the Billing Method and Billing Cycle selected in the <i>Post Tuition Fees - Billing Settings</i>.</p>
<p>Post to classes with this session</p>	<p>Use these criteria to post tuition fees for classes in a specific Session or Sessions (use CTRL or CMD to select multiple).</p> <ul style="list-style-type: none"> • The Session is assigned on the <i>Summary</i> tab of the <i>Class</i> record. • Sessions are defined in the <i>Drop-down List Editor</i> under the <i>Gear</i> icon > <i>Settings</i> > <i>General</i> > <i>Drop-down Lists</i>.

<p>Post to classes with this Category 1</p>	<p>Use these criteria to drill down to just the classes with a specific Category 1 value or values (use CTRL or CMD to select multiple). To further narrow down the classes you are posting tuition fees for, select a Cat2 or Cat3 value.</p> <ul style="list-style-type: none"> • The Cat 1, Cat2, and Cat 3 values are assigned on the <i>Summary</i> tab of the <i>Class</i> record. • Category 1, 2, and 3 values are defined in the <i>Drop-down List Editor</i> under the <i>Gear</i> icon > <i>Settings</i> > <i>General</i> > <i>Drop-down Lists</i>.
<p>Use these Tuition Discount Rules</p>	<p>If you selected the Billing Method of <i>By Class Fee</i>, this criteria will default to include all <i>By Class Fee</i> classes, i.e., all rules. Clear the checkboxes for any rules you want to omit from the posting. Note: At least one <i>Discount Rule</i> must be selected.</p> <ul style="list-style-type: none"> • The Tuition Discount Rule is assigned on the <i>Summary</i> tab of the <i>Class</i> record. • Tuition Discount Rules are defined in your <i>Tuition & Discounting Settings</i> under the <i>Gear</i> icon > <i>Settings</i>. <p style="text-align: center;">When Tuition Discount Rules are used, you can view the rule or edit it on the fly in this workflow by clicking the <i>Pencil</i> icon.</p>

Family Criteria

The **Family Criteria** can be used to limit the tuition posting so that only families that have the selected criteria in their *Family* records are included. The families that meet these criteria must also have students that are enrolled in classes with the Billing Method and Billing Cycle selected in the *Post Tuition Fees - Billing Settings* that also match any *Class Criteria* you've selected.

<p>Family Search</p>	<p>Use the Family Search field to post tuition fees to a specific family. The only families that can be searched are those with students enrolled in classes that have the Billing Method and Billing Cycle you selected in the <i>Post Tuition Fees - Billing Settings</i> and that match any <i>Class Criteria</i> you've selected.</p>
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Family Location	<p>Use the Family Location criteria to post tuition fees only to families in a specific Location (use CTRL or CMD to select multiple).</p> <ul style="list-style-type: none"> • The Location is assigned on the <i>Summary</i> tab of the <i>Family</i> record.
Membership Type	<p>Use the Membership Type criteria to post tuition fees only to families with a specific Membership Type.</p> <ul style="list-style-type: none"> • The Membership Type is assigned on the <i>Billing Info</i> tab of the <i>Family</i> record. • Membership Types are defined in the <i>Family</i> section of the <i>Drop-down List Editor</i> (<i>Gear</i> icon > <i>Settings</i> > <i>General</i>).
ePayment Schedule	<p>Use the ePayment Schedule criteria to post tuition fees only to families with a specific ePayment Schedule.</p> <ul style="list-style-type: none"> • The ePayment Schedule is assigned on the <i>Billing Info</i> tab of the <i>Family</i> record. • ePayment Schedules are defined in the <i>Family</i> section of the <i>Drop-down List Editor</i> (<i>Gear</i> icon > <i>Settings</i> > <i>General</i>).
Family Discount Rule	<p>When you are posting to classes billed By Class Fee, you'll have the option of posting tuition fees to only those families with a specific Family Discount Rule. Select the checkbox for any rules you want to include in the posting.</p> <ul style="list-style-type: none"> • The Family Discount Rule is assigned on the <i>Billing Info</i> tab of the <i>Family</i> record. • Family Discount Rules are defined in the <i>Tuition & Discounting Settings</i> under the <i>Gear</i> icon > <i>Settings</i>.

If you want to exclude a family when using Post Tuition Fees (*Transactions* menu), select the **Omit Family from Transactions > Post Tuition Fees** setting on the *Billing Info* tab of their *Family* record.

Multi-Student Discount Settings

You can include multi-student discounts if you are posting to classes with the **Billing Method** of **By Total Hours** and you have set *Post total hours per Student*.

The discount settings default to those defined in the [Total Hours Discount Settings](#) under the *Gear icon > Settings > Tuition & Discounting*. They can, however, be edited in this workflow and applied to this posting without affecting your Total Hours Discount Settings.

Additional Settings

There are a number of *Additional Settings* that can be selected when posting tuition fees. By default, all checkboxes are selected.

<p>Post tuition to active classes only</p>	<p>When selected, only classes with a Status = Active will be included in the posting.</p> <ul style="list-style-type: none"> • The status of a class is assigned on the <i>Summary</i> tab of the <i>Class</i> record.
<p>Post tuition to students with Enroll Type = Trial</p>	<p>When this setting is selected, students that are enrolled with the Enroll Type of Trial will be included in the tuition posting. The trial class must have the Billing Method and Billing Cycle selected in the <i>Post Tuition Fees - Billing Settings</i> and must also match any <i>Class Criteria</i> selected. To be included in the posting, the student's family must also match any <i>Family Criteria</i> selected.</p> <ul style="list-style-type: none"> • A student's Enroll Type can be viewed or edited on the <i>Enroll List</i> tab of the <i>Class</i> record. • Learn more about Trial Enrollment.
<p>Post tuition to students with Enroll Type=Waitlist</p>	<p>When this option is checked, students enrolled in classes from a Waitlist and whose Enroll Type is still set to Waitlist will be included in the tuition posting. The classes must have the Billing Method and Billing Cycle selected in the <i>Post Tuition Fees - Billing Settings</i> and must also match any <i>Class Criteria</i> selected. To be included in the posting, the student's family must also match any <i>Family Criteria</i> selected.</p> <p>Important Note: This does not include students who are on a Waitlist. It only includes students who have been enrolled into a class from the Waitlist and who still have the Enroll Type set to Waitlist.</p> <ul style="list-style-type: none"> • A student's Enroll Type can be viewed or edited on the <i>Enroll List</i> tab of the <i>Class</i> record.

Prorate tuition for future enrollments during Billing Cycle	<p>When you prorate tuition fees this setting is available. When it is selected, Jackrabbit will prorate tuition for a future enrollment when the future enroll date is during the Billing Cycle. When it is not selected, the full tuition fee is posted.</p> <p><i>Example</i> Jack is future enrolled in a class with a future enroll date of 6/20. You bill monthly and are posting fees for June's tuition. If this box is checked, Jackrabbit will prorate Jack's tuition and only bill him from 6/20 - 6/30.</p>
Prorate tuition for drops during Billing Cycle	<p>When you prorate tuition fees this setting is available. When it is selected, Jackrabbit will prorate the tuition for a future drop when the future drop date is during the Billing Cycle. When it is not selected, the full tuition fee is posted.</p> <p><i>Example</i> Jack has a future drop date of 6/13. You bill monthly and are posting tuition fees for June's tuition. If this box is selected, Jackrabbit will prorate Jack's tuition and only bill him for 6/1 - 6/12. The drop date of 6/13 is not included in the posting.</p>

<p>Include all classes when calculating multi-class discounts</p>	<p>When multi-class discounts are calculated in Post Tuition Fees, the default is to include ALL classes even if they don't meet the selected settings and criteria. Clear this checkbox to only count the classes that match the settings and criteria selected. Note: Any class assigned the rule "No Discounts" is always excluded from the multi-class count even when this checkbox is selected.</p> <p>When this checkbox is selected, Jackrabbit will look at the sum of all class tuitions to determine the highest / lowest for both multi-class and multi-student discounting.</p> <p><i>Example</i></p> <ul style="list-style-type: none"> • Jack is in 5 classes. • 3 of the classes have a Tuition Discount Rule named <i>Summer 2021 Discounts</i>. • 2 of the classes have a Tuition Discount Rule named <i>Recreational 2021 Discounts</i>. • Only <i>Summer 2021 Discounts</i> are selected from the <i>Use these Tuition Discount Rules</i> list in the <i>Class Criteria</i>. <p>If this setting is selected, Jackrabbit will count all 5 classes when calculating the student's multi-class discount. If this setting is not selected, only the 3 classes that match the criteria will be used to calculate the multi-class discount.</p>
<p>Apply tax to tuition</p>	<p>This setting is only available if <i>Tax Tuition Settings</i> is selected in your Organization Default Settings under the <i>Gear</i> icon > <i>Settings</i> > <i>General</i>.</p> <p>As a default, the tax will be applied to the tuition fees according to your <i>Tax Tuition Settings</i>. Clear the checkbox if you don't want to include tax in this posting.</p>

Transaction Details

This section can be used to add a **Transaction Subtype** and **Note** to the tuition fees that are posted. The note added here will be visible in the *Family* record on the *Transactions* tab and can also be seen in the transaction history in the Parent Portal. The note is limited to 200 characters and will appear after the Jackrabbit system note with the Billing Cycle and any discounting/prorating details.

TIPS

- Transaction Subtypes are created in the *Drop-down List Editor* (Gear Icon > Settings > General > Drop-down Lists > Transaction Subtypes).
- When **Post Later** is used to schedule a tuition posting and the Billing Cycle you are posting for is *Monthly*, selecting one of the three-character abbreviations (created and reserved by Jackrabbit) for the months will sync the Transaction Subtype to the Billing Cycle start date for all future postings. **Note:** the three-character month abbreviations (created and reserved by Jackrabbit) must be used; if a different Subtype is used, only fees with that Subtype value will be processed.
 - Example:
You create a task for your monthly billing beginning with the Billing Cycle start date of 7/1/2021 and you select the Subtype **Jul**. The next time the task runs, for the August billing cycle, the transactions will be stamped with the Subtype **Aug**.
- The Transaction Type *Tuition* cannot be changed.

Additional Discount

With the **Additional Discount**, you can apply an extra discount to the tuition fees, in addition to your other discounting and/or prorating. The discount can be either a dollar amount or a percentage.

- If the Additional Discount is a dollar amount, it will be applied after all other discounts have been calculated and deducted from the base tuition amount (tuition fee before discounting and prorating). The discount will be spread out across all students in the family account.
- If the Additional Discount is a percentage and you **prorate tuition**, you will be given an option as to how to apply the percentage.

The *Discount Label* entered will be included in the Notes of the transaction when tuition fees are posted.

[Learn more about the Additional Discounts](#)

Advanced Detection

Advanced Detection is a tool designed to identify tuition fees that may have already been posted (duplicate tuition fees). It can also alert you to any fees that are set to post for a student who was enrolled *and* dropped during the Billing Cycle due to an administrative error, as an example (dropped student fees).

The **Preview Tuition Fees** page, generated when the *Preview Fees* button is selected, highlights the fees detected as being duplicates or dropped students. The reason for being detected as a duplicate or drop is included in the preview results.

Frequently Asked Questions

Q. Why are some of my classes not pulled into the batch when I use Post Tuition Fees?

A. When creating a tuition batch, it is your criteria and setting selections that tell Jackrabbit which

classes to pull into the batch. The selections you make in Post Tuition Fees, that relate to which classes are having tuition posted, point to fields that are found in the *Class* record, on the *Summary* tab.

They include:

Class Status	Class Session	Class Categories (1, 2, and 3)
Tuition Billing Method	Tuition Billing Cycle	Tuition Discount Rule

To troubleshoot, look at your criteria and setting selections and then look to a class that was **not** included in the batch. Does the class have the *Billing Method* you selected when you created the batch? If you selected a *Class Session* in your criteria selections, does the class have that session value?

If you are unable to locate the discrepancy, contact Support using the  icon in your system, we are here to help!

Q. How do I isolate specific families for specific billing frequencies?

A. One way to do this is to use *Membership Type* (on the Family Billing Info tab) to isolate which families should have tuition posted. For example, Membership Types might be Monthly, Annual, Semester, etc.

1. Create Membership Types by going to the **Gear** (icon) > **Settings** > **General** > **Drop-Down Lists** (left menu).
2. Click **Membership Type** under **Family** from the choices on the left.
3. Use the **Add Row** button to add a new type.
4. Click **Save Changes**.
5. Add a Membership Type to a family by going to the family's *Billing Info* tab.
6. Choose a *Membership Type* from the drop-down list.
7. Click **Save Changes**.

Post tuition fees to specific *Membership Types* by selecting a Type in the **Membership Type** field in *Post Tuition Fees*.
