Tuition Billing in 4 Steps - Fine Tune your Process

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Wouldn't you love to just snap your fingers and have all your families billed and tuition paid in full? Well, we can't make it that easy, but, Jackrabbit does provide you with the tools to help fine-tune your billing process!

Whether you refer to tuition billing as "charging families" or "billing families" at Jackrabbit we refer to it as posting fees and processing payments. There are 4 steps in the tuition billing process.

Let's step through the tuition billing process and at the end create a sample workflow for your review.

Things to Consider Before You Start

These are some important questions to ask before you move ahead.

Q. Have you defined your tuition fee settings? This will tell Jackrabbit how you want to post tuition when a student enrolls in a class.

Q. Have you thought about a billing cycle? A billing cycle is defined by how often you bill tuition to your students.

Q. Do you want to offer discounts? Discounts can be tricky and you want to be sure to always keep your bottom line in mind when considering discounts (multi-class or multi-student).

Blog Post: **Understanding when and how to prorate and discount tuition fees**

Help is here! Click to learn how to define and set your tuition settings.

Q. Do you want to offer families different payment options? This will allow families to pay in different increments; pay in full, monthly, quarterly, or by session. Assign an **ePayment Schedule** or Membership Type to families.

Q. Have you set up a billing and/or ePayment policy and assigned it to classes? For our clients who use ePayments, we recommend you create a separate ePayments billing policy.

> See **Legal Policies & Policy Groups - An Overview**
>
> Blog Post: **Tuition Tips: How to enforce your tuition policy to ensure revenue**

Q. Do you need to increase tuition fees? No one wants to raise prices, however, it may be necessary for several reasons. This blog has some great tips and suggestions for when you do increase fees.

> Blog Post: **How often should I raise dance studio tuition?**

Expand/Collapse All

Step 1 - Select How to Post Fees to Family Accounts

There are several options for posting tuition fees to accommodate how you run your business. Depending on your business needs, you may use one, two, or all three options.

Tuition Fee Settings - We recommend using this method to post fees automatically* to family accounts when students are enrolled by any of the following:

- Online Registration & **Quick Registration** for new students.
- Parent Portal for existing students.
- Staff enrolls students with links/buttons throughout Jackrabbit.

Adjustments are made for discounts and proration.

Transactions (menu) > Post Tuition Fees - Post tuition fees for a billing cycle to multiple families or to just one family. Use the Post Tuition Fees page each billing cycle to post fees or set up to post fees automatically. This method offers an advanced detection tool to help you avoid double-charging families.

- Learn how to use **Transactions > Post Tuition Fees.**
- Learn how to **Save your Report Criteria Selections**
- Use **Automated Tuition Fee Posting**, the Post Later option to schedule posting tuition fees automatically!
  - *Transactions > Post Tuition Fees* should be run manually for several billing cycles before automating to ensure fees are posted correctly.

Make Sale/Post Fees - Use this method to post tuition fees to an individual family. You must enter the correct Transaction Type, Category 1, Tuition Fee, Discount, Student, and Class.

This method has a higher risk of user error. If a student or class is not selected correctly the family will be included in the Tuition Not Posted report.

Learn how to post tuition fees with *Make Sale/Post Fees*.

Step 2 - Check for Tuition Fees

You don't want to forget this step! The **Tuition Not Posted** report shows all students enrolled who may be missing a fee posted to their family account. If a student is on the report you should review the family's account for issues.

In addition to reviewing the Tuition Not Posted report, we suggest you spot-check family accounts for the following:

- Check any **Notes** or **Tasks on the Dashboard** for special billing considerations for families.
- Use **All Families** and add filters (one filter at a time): *Has Not Had A Fee Posted Since, Has Family Fixed Fee, Has Family Discount, Family Discount Rule.* Learn more about **Discounts for Specific Families - The Options**.
- Use **All Students** and add filters (one filter at a time): *No Tuition Posted Since, Has Student Fixed Fee.*

Step 3 - Find & Apply Unapplied Credits to Fees

It's important to take this step to find any unapplied credits, this will save you tons of time and a lot of aggravation!

Check for unapplied credits and link these prepayments (credits) to any fees. This will avoid errors when collecting payments from your families and link the payment to the correct Fee Category 1 for accurate reporting.

Go to the **Transaction (menu)** > **Find Unapplied Credits** to find and apply payments/credits for more than one family at the same time.

Communicate with Your Families (optional)

We recommend you communicate with your families before moving to the next step for processing payments:

- Email your parents to alert them you will be posting fees, just in case, they need to update their billing information.
- Include a **link to your Parent Portal** so families can easily log in and make changes to their credit card/debit card information.
- Go to the **Families (menu)** > **All Families**, filter for families with *Has missing/expired credit cards*, and email those families from the *All Families* grid. Click the **Send a Message** icon to email those families with a custom-designed email template (103 Credit Card Expired) or **Create Your Own Email Template**.
- Jackrabbit offers the ability to send **statements** by print or email to multiple families at one time.

Step 4 - Process Payments

Jackrabbit offers the option to partner with one of three **ePayment Partners** to save you time and money. Payments can be processed for multiple families all at once with payment transactions posted to family accounts automatically and family balances updated.

Recommended Option - Even though there are a few options available to you for processing payments, we recommend you process all ePayments at once using the **Transactions** menu > **Process ePayments**.

Select **Post Later** to **Automate ePayments to Process Later** and set up a recurring schedule. ePayments should be manually processed several times before automating to ensure accuracy.

Individual payments can be posted to a family's account using the following:

- **Families** (menu) > **All Families**
- **Family record (Payment/Credit button)**

Learn how to ***Post an Individual Payment to the Family Record.***

Click to download 4 Steps Tuition Billing (PDF) with clickable links to articles in the Help Center.

Additional Educational Materials

On-Demand Webinars	Watch these webinars at your convenience: **Automatically Post Tuition Fees with Jackrabbit** **ePayments with Jackrabbit**
Blog Post	**Automated Tuition Posting - How to save time with Jackrabbit's latest feature: automated tuition posting**

Tuition Billing Workflow Example - ABC Gymnastics School

ABC Gymnastics School Business Rules

	ABC Gymnastics School operates 2 sessions per year: • School Year Session (August-May) • Summer Session (June-July)
	Students can enroll in classes any time during the School Year Session.
	Tuition fees are posted monthly.
	Enrollments and dropped classes are prorated based on when the student enrolls or drops in the month.
	ABC Gymnastics offers multi-class and multi-student discounts.

Tuition Workflow

Tuition Fee Settings should be set to post discounted and prorated tuition:

- When enrolling with the Quick Registration form or using Enroll buttons/links in Jackrabbit, staff should select *Post Selected Fees Now* to post tuition fees during each enrollment.
- Tuition will post automatically during enrollment using the Online Registration form.

On the 25th of every month, perform the following tasks:

- Post tuition fees for the upcoming month *(Transaction menu > Post Tuition Fees):*
    - Select a *Saved Favorite* from the drop-down list selection to quickly load the settings.
    - Settings include Advanced Detection to find any tuition fees that were posted for new enrollments since the last tuition posting the previous month on the 25th.
- Run the Tuition Not Posted report and review each family's account on the report.
- Use Find Applied Credits *(Transactions menu > Find Applied Credits)* to apply payments/credits to fees.
- Email statements to families (optional).
- Perform a search for missing/expired credit cards *(Families menu > All Families > filter for "Has Credit Card Expired/Missing")* and contact families to update the information.

Quick Tip: Select **Post Later** *to schedule tuition fees to be posted automatically on the schedule you set.*

On the 1st of every month, perform these tasks:

- Process ePayments for all families/accounts.
- Review declined ePayments and troubleshoot as needed.

Quick Tip: Select **Process Later** *on the Process ePayments page to schedule payments to be processed automatically on the schedule you set.*

If you have questions about any information included in this article, please contact us. Click on the question mark in Jackrabbit to request assistance, or **click here** to book a call with one of our Support Specialists.