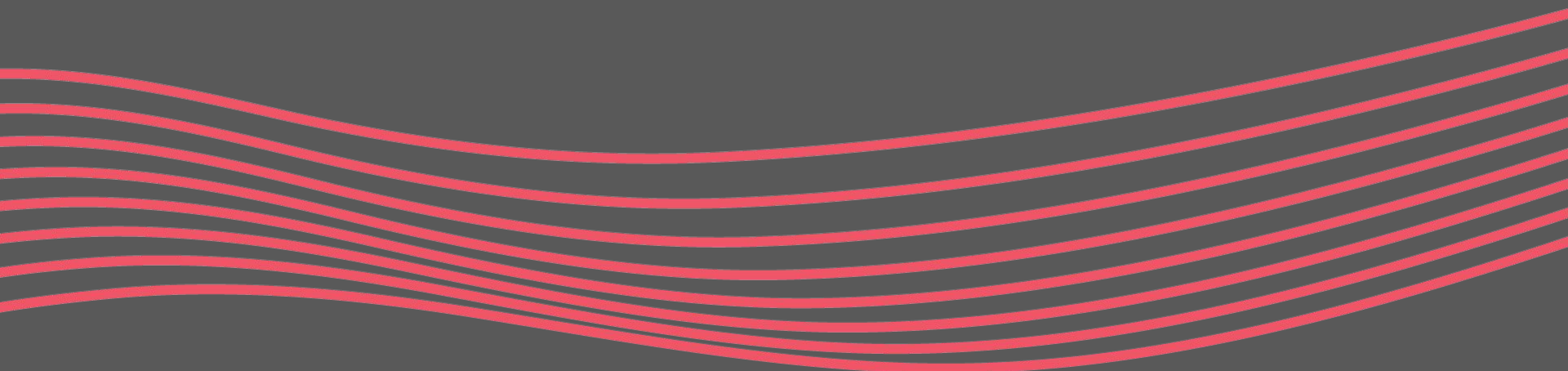




Billing: Post Contract Workflows

Client Education



New Features

- Payout Notifications > System Emails tab.
- Ability to Update the Statement Descriptor, which displays on bank account/cc statements when a payment is made through SchoolAdmin Payments.
- Account Balance Filter within the AR Aging Report.
- Payment History now displays who issued a refund.
- Ability to see Audit Log of changes within Payment Setup.

Help Articles

- [System Emails](#)
- [SchoolAdmin Payments](#)
- [AR Aging Report](#)
- [Payment History](#)
- [Payment Setup](#)

Checklist Workflows

Contract checklist item: What happens?

- The contract checklist item adds charges once marked complete.
- How can we update items on the contract with and without a new signature?

Deposit checklist item: What happens?

- The deposit checklist item adds a payment to the ledger once marked complete.

Contract Adjustments

Future Charge Adjustments ONLY, including financial splits and payment plan changes

- Use the Rearrange Installments feature.

Past Charge Adjustments

- Regenerate the contract with the parent's signature. **OR**
- Regenerate and submit the contract **internally** (no parent signature needed!). Choose this option if you don't need a signed contract that matches the payment plan on the ledger.

Ledger Actions

- Within the payer's Ledger tab, you can add a charge, credit or payment, and rearrange installments for future contract adjustments.

Best Practice:

Send the 'Updated Statement' email from the payer's Ledger tab once all adjustments have been made.

Help Article

- [Click here](#) to learn how to make contract changes.

Individual Payer/Parent Adjustments

Student Record > Portal Access Quick Link

- Financial Split Percentages
- Add/Remove Payers

Student Record > Billing Tab

- Manage Shared Access
- Manage Billing Communications for all associated billing accounts/shared access

Parent/Payer Record > Overview Tab

- Billing Day (overrides global billing day)
- Late Fee Management
- Payment Profile Management

Help Articles

- [Financial Responsibility](#)
- [Financial Splits](#)
- [Student Record: Billing Tab](#)
- [Parent Record: Overview Tab](#)

Parent Portal Actions

- Admins can make payments on behalf of parents using ACH or by manually entering in unique cc details that are not included in a saved payment profile using impersonate.
- Parents can make ad-hoc manual payments.
- Parents can update their payment profiles and saved cc information.
- Parents can share billing access.
- Parents can access their billing statement and tax statement within the portal.

Help Articles

- [Billing: Parent Workflow](#)
- [SA Payments: Processing a Manual Payment](#)