

*A*chademix

Student Data Management

Managing Student Activity (Part #1)

Student Records, Pathway Enrollment,
Assessment & Initial Payments

CODELEVEL SERVICES LLC

Agenda

In this session users will learn how to enter student records, track required documents and assessment scores, enter notes and register and enroll students into Pathways.

- Entering New Students
- Entering Student Assessment Scores
- Registering and Enrolling Students in Pathways
- Taking Initial Payments
- Running a Deposit

Student Module

Working with Student Information...

Sessions

- Information
- Documents
- Enrollments
- Attendance
- Grades

Quick access to your students information...

easily accessing those students currently enrolled.



Student Module

Information: Student Contact and Demographic data. This is “static” data that is not related to any Pathways for which the student may be enrolled.

Documents: The Student File. This session provides a listing of documentation provided by, or for, the student such as Required Entry Forms, Activity History and General Notes.

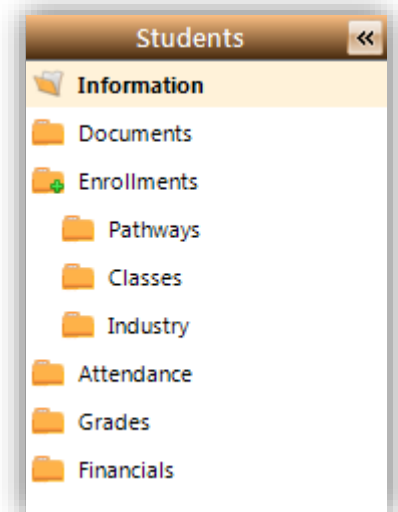
Enrollments: General term used for associating a student with the following:

- Pathways: Full-time Program

Attendance: Student Attendance Records (Not covered in this training session)

Grades: Student Grade and Performance Information (Not covered in this training session)

Financials: The Student Account (Charges, **Payments**, Financial Assistance)



Adding a New Student

BASICS

1. Navigate to the Student Module - **The default session is "Information", though be sure this is the selected session before moving to Step 2.**
2. In the Ribbon, select "Add Student"
3. The Detail Panel will become ready to receive new data, thus it is here where you can begin to enter the student's information
4. Once you have entered all applicable data, click on "Save" at the bottom of the screen

CTEC Career & Technology Education Centers

Main Reports Options Settings

Add Student Remove Student

Enter Student Name and/or ID

Show Print Show Required Documents Standard Comprehensive Short Term Application

Hide xls Assessments / Credentials Secondary Application

Minimize List Panel Summary Panel Detail Panel Adult Application

Student Locate

Student List (170)

Name ID # Status

Andrea Young 18837 Standby

Prospect

First Name Last Name

Middle Name Maiden Name

Name Suffix Preferred Name

Status: Prospect Student ID

Date of Birth Calculated Age

Is Senior SSN

Add Contact

No Contact Information

Add Address View

Title: Address: Type: Active Primary Mailing Publish

City/State/Zip:

Hometown: Populations:

Gender: Marital Status: (Not Selected)

Ethnicity: (Not Selected) Race: (Not Selected)

Language: (Not Selected) Home Language: (Not Selected)

Is Resident: Residency Status: (Not Selected)

Education Level: (Not Selected) Graduation Date:

Advisor: Parking Permit:

Auto Tag Number:

Select All

Save Cancel

9/5/2014

Click to add student

Click to add phone and email contacts

Click to add an address

Required Data (record cannot be saved unless data has been entered here)

Save your data!

Student Information

All "Searchable" options using #POP

Key Information

1. First and Last Name (required)
2. Phone and Email
3. Address

Auto Filled Data (can be overridden)

1. Preferred Name
2. Student ID
3. Status (The system maintains control over this data and will change it as different events occur during normal operations. **Do not attempt to change this field manually unless you are making the student inactive.** Note that if an immediate update does not occur after enrollment, etc., it will be auto corrected before the next day.)

Multiple Select Drop Down List

- Populations

Click outside the list to close it once your selections are made

Helpful Assistant

- Default area code is set to "740"
- Phone numbers will auto format, only enter the "numbers", no hyphens or parenthesis
- SSN will auto format, do not put in the hyphens

Duplicate Student Check

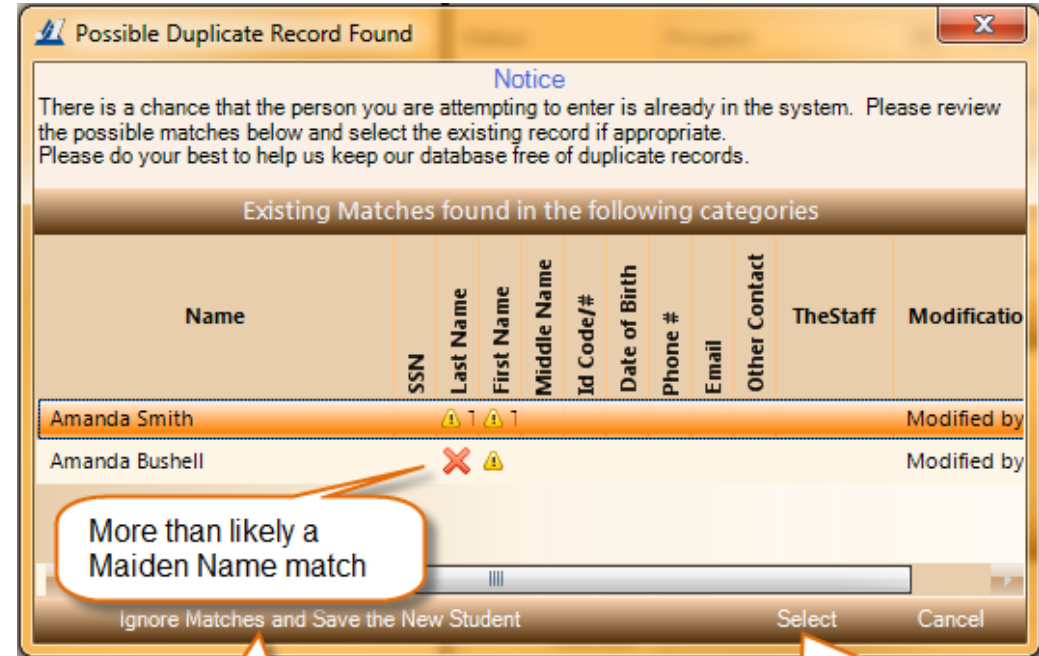
When a new student record is saved for the first time the system will evaluate the new entry against all existing student records in an attempt to locate any possible matches that are already in the database.

The more initial data that can be provided as a new student is entered, the better the matching results.

First name will also review against the name in the Preferred Name field.

Last name will also review against the Maiden Name field.

If no matches are found, the new student record is saved and you will not see this dialog.



I don't care I just want to add them as a new student in the system!

Update this selected student with data you just entered as this is the same person

Contacts and Addresses

Contacts: Unlimited

DO NOT DELETE old (once valid) contact information. Just uncheck the “Active” box and add your new contact information.

The screenshot shows the 'Contacts (3)' form. A red arrow points to the 'Add' button. A callout box says 'Select contact to Edit!' pointing to the 'Mobile' dropdown. Another callout box says 'Select Relation to the student' pointing to the 'Relation/Name' dropdown. A third callout box says 'Enter name of person or place if not the students Contact' pointing to the text input field. The form fields include: Type: Mobile Phone, (580) 399-1061, Textable (checked), Relation/Name: Self, Active (checked), Primary (checked), Emergency (unchecked), Parent (unchecked), Notify (checked), Publish (checked).

Contacts (5)	Add	Edit
Mobile Phone: (580) 330-9737 Home-Amanda's cell Active/Primary/Notify/Publish		
Mobile Phone: (580) 549-1637 Mike Bushell-Dad Active/Emergency/Notify		
Mobile Phone: (580) 549-1726 Lynda Bushell-Mom Active/Emergency/Notify		
Phone (Land Line): (580) 310-7345 Linda Bushell wk Active/Emergency/Notify		
Phone (Land Line): (580) 245-2860 Donnieta Ray Active/Emergency		

Addresses: Unlimited

DO NOT DELETE old addresses, simply uncheck the “Active” box and add your new address.

Do not put anything in the Title field unless it needs to be something different than the student's name (i.e. Parents Name, Employer's Name, etc.).

The screenshot shows the 'Address (1)' form. Fields include: Title (empty), Address: 1113 South Belmont, City/State/Zip: Ada, OK, 74820. On the right, Type: Home, Active (checked), Primary (checked), Mailing (unchecked), Publish (unchecked).

Contacts and Addresses (continued)

Options

- ❑ **Active** – If checked, this contact is current and may be used as a valid contact method. If unchecked it is no longer valid and should only be used for reference.
- ❑ **Primary** – If checked, this contact will receive first consideration when the system is locating contact information to place on reports or in summary screens.
- ❑ **Emergency** – If checked, this contact number will appear on the student summary panel in **bold red** print for quick access.
- ❑ **Parent** – If checked, this contact is considered a parent contact only.
- ❑ **Notify** – If checked, this contact can be used as a method to send information to the student by the means indicated.
- ❑ **Publish** – If checked, this contact information may be presented on a public form (i.e. web site)
- ❑ **Textable** – If checked, this indicates that this mobile phone can receive text messages.
- ❑ **Mailing** - If checked, this address will get first consideration when printing mail to addresses.

Student Assessments

The screenshot shows the Assessment Manager interface. At the top, there is a navigation bar with 'Main', 'Reports', 'Options', and 'Settings'. Below this is a toolbar with 'Add Student', 'Remove Student', and 'Student Locate' (with a search input field). A 'Print' section includes 'Show', 'Hide', and 'Minimize' options for 'List Panel' and 'Summary Panel'. The 'Assessment Manager' menu item is highlighted. A callout box points to it with the text: **STEP 1: Open the Assessment Manager from Students > Information**.

The main window is titled 'Testing Manager for: Elmer Fudd'. It contains a table of assessments:

Title	Section	Score
WorkKeys	Applied Mathematic	5.00
WorkKeys	Locating Informatio	4.00
WorkKeys	Reading for Inform	5.00

A callout box points to the bottom of the table with the text: **STEP 2: Choose the "Record New Assessment" button at the bottom of the Assessment Manager form**.

To the right of the table is a form titled '- Editing the selected test -'. It contains fields for 'Title' (WorkKeys), 'Section' (Applied Mathematics), 'Version', 'Score' (5.00), and 'Date'. A 'Note' field is also present. A callout box points to the 'Save' button with the text: **STEP 3: Complete the form as applicable and choose Save to record the student's outcome**.

At the bottom of the window, there are buttons for 'Record New Assessment', 'Delete', 'Save', and 'Cancel'.

Record and review test scores for pre entrance or exit exams.

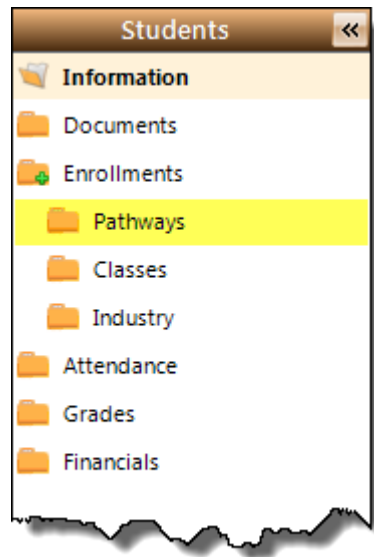
Example:

- WorkKeys

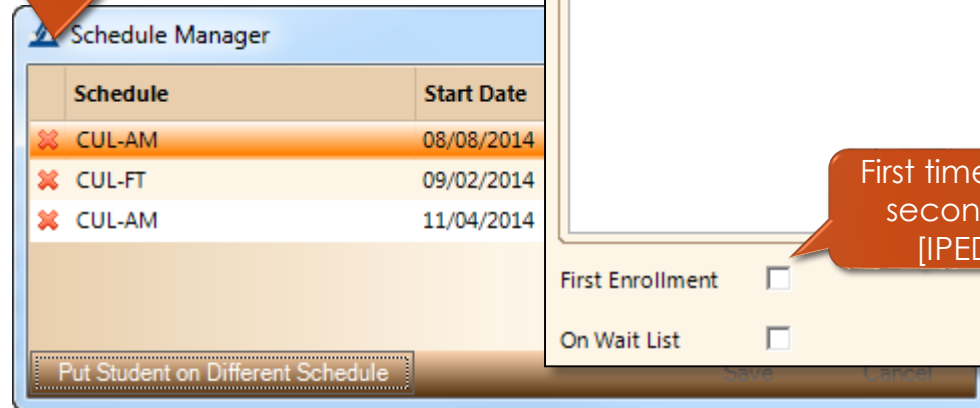
Pathway Enrollment

Full Time Programs

When registering a student for a Pathway it is important to set a Planned Exit Date and a Schedule.



The Schedule Manager helps to manage schedule changes.



Planned Exit Date helps track progress for Adult Students on Financial Aid

The main enrollment form contains the following fields and sections:

- Registration Date:** 08/07/2014
- Entry Date:** 08/08/2014
- Exit Date:** 11/18/2014
- Planned Exit Date:** 11/18/2014
- Advisor:** (Not Selected)
- Grade Group:** Main
- Enrollment Status:** Withdrawn
- Enrollment Purpose:** Career Major Completer
- Exit Reason:** Attendance Issues
- Graduation Date:** (empty)
- Last Date Attended:** 11/04/2014
- Pathway Schedule:** CUL-AM

Grade Summary:

- Letter Grade: B
- Numeric Grade: 85.17
- Credits: 0
- Hours: 272.50
- GPA: 3.67

Attendance Summary:

	Days	Time
Total Possible:	75	295:00
Total Present:	59	
Total Absent:	16	
Total Tardy:	1	
Total Excused:	0	
Total Makeup:	0	

Note: Changed from FT to PT on 11/4/14.

Auto Calculate LDA:

First Enrollment:

On Wait List:

Finalized & Locked:

The schedule defines the dates/times that the student is supposed to attend class.

First time post-secondary [IPEDS]

Registering a Student in a Pathway

BASICS

1. Select the Student Module
2. Choose the Enrollment > Pathway Session
3. Locate and select the desired Student in the List Panel
4. On the ribbon, select "Add New Enrollment"
5. In the pop up dialog, search for the Pathway in which to register the student
6. Double-click on the desired Pathway to select
7. In the Detail Panel, complete the required fields, among other applicable data
8. Click "Save"

Pathway Registrations can be entered from the Student Module or the Pathway Module.

- Enrollment from the Student Module requires the user to select the Pathway when adding a new enrollment.
- Enrollment from the Pathway Module requires the user to select the Student when adding a new enrollment.

The screenshot shows the Chademix software interface. The left sidebar (1) contains navigation options: Information, Documents, Enrollments, Pathways, Classes, Industry, Attendance, Grades, Financials, My Page, Students, and Career Majors. The 'Students' list (3) shows two students: Richard Candelaria (ID # T140000) and Jacob Dean (ID # T140000). The 'Career Major Selection for Jacob Dean' dialog (5) shows 'Locate Career Major: CUL'. The 'Detail Panel' (7) contains the following fields:

Registration Date	05/22/2015	Enrollment Status	Pending
Entry Date	08/08/2014	Enrollment Purpose	
Exit Date		Exit Reason	(Not Selected)
Planned Exit Date		Graduation Date	
Advisor	(Not Selected)	Last Date Attended	
Grade Group	Main	Pathway Schedule	

The 'Grade Summary' section includes:

Letter Grade:	
Numeric Grade:	0
Credits:	0
Hours:	0

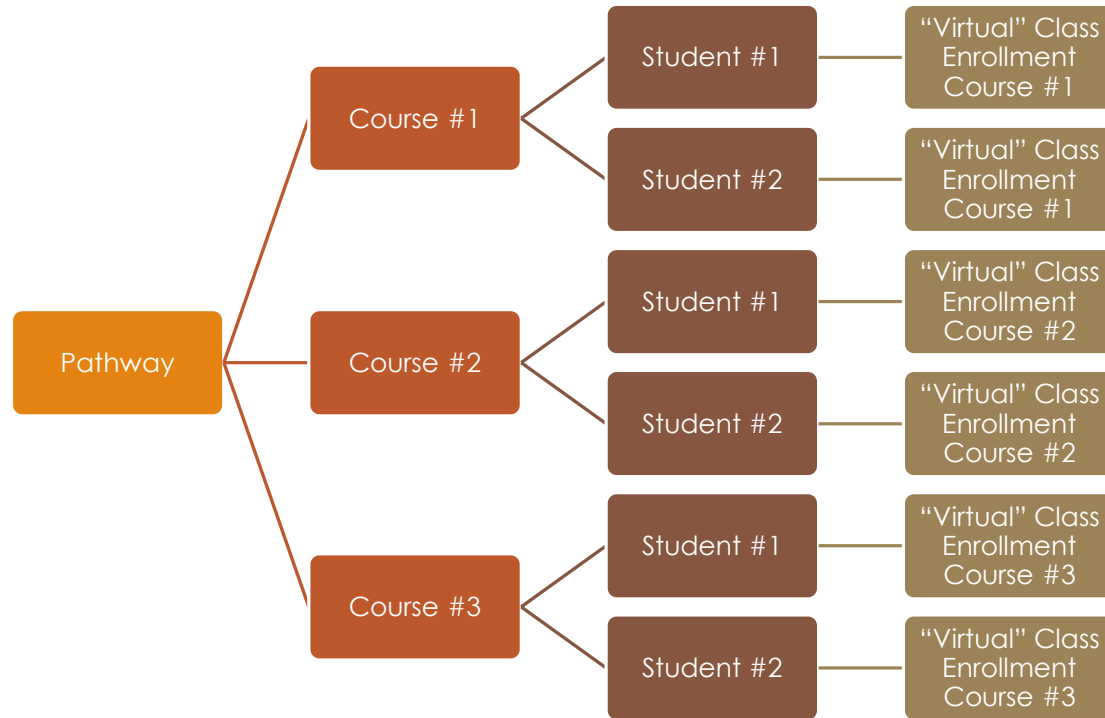
The 'Attendance Summary' section includes:

	Days	Time
Total Possible:	0	0
Total Present:	0	0
Total Absent:	0	0
Total Tardy:	0	0
Total Excused:	0	0
Total Makeup:	0	0

The 'Note' section is empty. The 'Auto Calculate LDA' checkbox is checked. At the bottom, there are checkboxes for 'First Enrollment', 'On Wait List', and 'Finalized & Locked'.

Pathway Enrollment (continued)

Things to know...



Students		Student List (33)			
		Name	ID #	Status	Level
		Jacob Dean	T140000234	Active	11
Class Enrollments		Entry Date	Exit Date	Status	
<input type="checkbox"/>	vCUL1173	08/08/2014		Active	
		<i>CUL1173- Nutrition and Health Cooking Techniques</i>			
<input type="checkbox"/>	vCUL1183	08/08/2014		Active	
		<i>CUL1183- Entrepreneurship & Employability Skills</i>			
<input type="checkbox"/>	vCUL1203	08/08/2014		Active	
		<i>CUL1203- Hospitality & Service Techniques</i>			
<input type="checkbox"/>	vCUL1223	08/08/2014		Active	
		<i>CUL1223- Intermediate Culinary Skill Development I</i>			
<input type="checkbox"/>	vCUL1103	08/08/2014	10/06/2014	Completed	
		<i>CUL1103- Introduction to Culinary Arts</i>			
<input type="checkbox"/>	vCUL1123	08/08/2014		Active	
		<i>CUL1123- Foundations in Culinary Arts I</i>			
<input type="checkbox"/>	vCUL1133	08/08/2014		Active	
		<i>CUL1133- Foundations in Culinary Arts II</i>			
<input type="checkbox"/>	vCUL1143	08/08/2014		Active	
		<i>CUL1143- Culinary Business and Management Principles</i>			
<input type="checkbox"/>	vCUL1153	08/08/2014		Active	
		<i>CUL1153- Foundations in Baking I</i>			
<input type="checkbox"/>	vCUL1233	08/08/2014		Active	
		<i>CUL1233- Intermediate Culinary Skill Development II</i>			
<input type="checkbox"/>	vCUL1253	08/08/2014		Active	

By registering & enrolling a student into a Pathway, the system will automatically create the student's Class enrollment records for each of the Pathway's associated Courses.

Student Enrollment Statuses

Enrollment statuses define the association a student has with a program or course.

These statuses can be broken down into categories as follows:

- **Pre-registration**
 - Interest
 - Pending
 - Pending (T)
- **Registration**
 - Approved
 - Canceled
 - Dropped
- **Enrollment**
 - Active
 - Completed
 - Completed (T)
 - Incomplete
 - Withdrawn

The screenshot shows a web-based form for a student named 'PN - Practical Nursing' with an 'Active' status. The form includes several sections:

- Registration Information:** Registration Date (06/25/2014), Entry Date (07/02/2014), Exit Date (empty), Planned Exit Date (05/21/2014), Advisor (Not Selected), Grade Group (Main).
- Enrollment Status:** A dropdown menu is open, showing options: Active (selected), Approved, Canceled, Dropped, Withdrawn, Incomplete, Completed, Completed (T).
- Grade Summary:** Letter Grade: A, GPA: 3.83, Numeric Grade: 91.33, Credits: 0, Hours: 41.00.
- Attendance Summary:** A table with columns for Days and Time.

	Days	Time
Total Possible:	159	1113:00
Total Present:	156	1081:00
Total Absent:	3	21:00
Total Tardy:	3	11:00
Total Excused:	0	0
Total Makeup:	0	0
- Note:** A text area for additional information.
- Auto Calculate LDA:** A checked checkbox.
- Buttons:** Save and Cancel buttons at the bottom right.

Student Enrollment Statuses

Pre-registration

Interest – This option associates the student with a pathway/class as one of an inquiry only. At this stage, no fees are charged, no documents are required, etc. This option is mostly used for marketing purposes and will likely be populated using the Online Registration system, especially for those programs where students must apply to enter.

Pending – This option is set when the student applies (thus decides to move forward). At this time, documents may be required, fees may be charged as applicable, etc. Likely, when entered by staff, this is the default for pathway enrollments. For classes, which usually require payment up front, a better default would be Approved.

Pending (T) – This option specifies that the course was completed at another institution, though has yet to be approved – i.e. set to Completed (T). When this option is used, the Transfer School should also be included.

Not Transcribed

Not Transcribed

Student Enrollment Statuses

Registration

Approved – This option is set when the student has met all requirements necessary to enter the pathway/class. Their account is usually charged at this time and they are considered pre-rostered.

Canceled – A cancellation will likely occur on a 'registration', thus is usually the chosen option for those registrations that were terminated before the start of class. Note that this option may still be selected once the student has gone Active as well. A Canceled status is much like a "deletion" in that it will only be available for marketing purposes and not used for any state or federal reporting.

Not Transcribed

Not Transcribed

Student Enrollment Statuses

Enrollment

Active – This option is synonymous for “Enrolled”, as this is when the registration is officially classified as an enrollment and thus the student is responsible for the associated work. At this stage, the student either has to Complete (transcribed), Withdraw (transcribed), or Drop (not transcribed – time set by policy).

Dropped – Just as a cancellation can only occur on a registration, a drop can only occur on an enrollment. This option is set when the student leaves the class/pathway early enough that the enrollment may not be transcribed. This status is another that is not reported on state or federal reports, as it is in effect a cancellation, though after the registration was considered an enrollment. However, due to policy, the student left the class/pathway early enough in the schedule that they may get a partial refund and avoid transcription.

Not Transcribed

Not Transcribed

Student Enrollment Statuses

Enrollment (continued)

Withdrawn – This option is used when the student leaves the class/pathway before finishing the curriculum and thus did not receive a final grade. When transcribed, **which it will be**, it will show the student’s grade as a “W” and no hours or attempted/earned credits will be assigned.

Incomplete – This option is set when the student has met all the schedule requirements, however some academic requirements are still outstanding and no final grade has been issued. An Incomplete should never be considered a “final” status, as they should be resolved with a grade within a certain amount of time. By default, Achademix allows 6 months to resolve the enrollment before notifications begin.

Transcribed

Transcribed

Student Enrollment Statuses

Enrollment (continued)

Completed – This is set when the student has finished all the academic and schedule requirements of the pathway/class. This doesn't mean that they have paid in full, returned all post-enrollment documents, etc. It simply states they completed the curriculum and a final grade has been awarded.

Completed (T) – This option specifies that the course was completed at another institution and should be transcribed with different properties than a Complete. When this option is used, the Transfer School should also be included. When transcribed, these courses may calculate in the GPA, or not as set by policy.

Transcribed

Transcribed

Pathway Rosters

Once the students are enrolled, the Pathway Roster can be generated to display student's by their schedule – 1516F, 1516S, etc.

To run the Pathway Roster, navigate to Pathways > Enrollment > Reports > Pathway Enrollment Roster.

Note that from this Enrollment session, you can view all the enrollments right on the screen. Remember, clicking on the headers, such as the Schedule header, will sort by that column.

Student	ID #	Enroll Status	Schedule
<input type="checkbox"/> Charles Atkins	AE1000196	Active	15F-D2
<input type="checkbox"/> John Blair	AE1000201	Active	15F-D2
<input type="checkbox"/> Robert Channell	AE1000213	Active	15F-D2
<input type="checkbox"/> Kory Cottrill	AE1000250	Active	15F-D2
<input type="checkbox"/> Michael Deem	AE1000262	Active	15F-D2
<input type="checkbox"/> David Garrett	AE1000305	Active	15F-D2
<input type="checkbox"/> Denny Gossett	AE1000313	Active	15F-D2
<input type="checkbox"/> Thomas Lipscomb	AE1000353	Active	15F-D2

Pathway Roster Report

Include Students with the following enrollment statuses.

All

Pending

Approved

Canceled

Active

Dropped

Withdrawn

Complete

Incomplete

Select an additional information item to include.

Contact Information

Attendance Information

Grade Information

Enrollment Note

Schedule

Primary Address

Planned Exit Date

Feeder School

Select the student order.

Student First Name

Student Last Name

Enrollment Status

Enrollment Schedule

Enrollment Entry Date

Planned Exit Date

Feeder School

Make the proper selections

Pathway Roster

Pathway: Heating, Ventilation, Air Conditioning & Refrigeration

Instructor: Donald Rode, Marty Clark, Samual Brookover, Scott Gibson

Days: ---WT-- **Students Shown: 19**

Schedule	Student Name	Status	Planned Exit Date
Schedule: 15F-D2			
	Charles Atkins	Active	9/21/2016
	Charles Preston	Active	9/21/2016
	Christopher Lowers	Active	9/21/2016
	David Garrett	Active	9/21/2016
	Denny Gossett	Active	9/21/2016
	John Blair	Active	9/21/2016
	John Wittman	Active	9/21/2016
	Kory Cottrill	Active	9/21/2016
	Michael Deem	Active	9/21/2016
	Michael Whited	Active	9/21/2016
	Phillip Thompson	Active	9/22/2016
	Robert Channell	Active	9/21/2016
	Stephen Townsend	Active	9/21/2016
	Thomas Lipscomb	Active	9/21/2016
	Dakota Welker	Withdrawn	9/21/2016
	Tim Curry	Withdrawn	9/21/2016
Schedule: 16F-E			
	Brandon Gibbs	Approved	9/20/2017
	Jarrod Ford	Approved	9/20/2017
	Terry Schultz	Approved	9/20/2017

Student Totals: 3 Approved, 14 Active, 2 Withdrawn

Direct Payments

What is a Direct Payment?

Achademix refers to a direct payment as any form of collecting “real” money, such as:

- Cash
- Check
- Credit Card
- EFT (Electronic funds transfer)

In other words, a direct payment will result in money that will appear on that day’s deposit report.



Entering an Account Payment

BASIC

1. Locate the account where to post the payment (choose the Module and perform a Search)
2. Select the Financials Session
3. Click on "Take Payment" in the Ribbon
4. Enter the payment amount
5. Use the "Pay" buttons or the payment fields to allocate the payment to charges with unpaid balances
6. Select the payment type and complete the applicable information (if any).
7. Click on the "Save Payment Info." button to record the payment

Notice: You cannot post (save) the payment until it is completely allocated.

The screenshot shows the 'Account Transactions' window with the 'Accept Payment' tab selected. The 'Enter Payment Amount' field contains '270' and the 'Unallocated Amount' is '\$50.00'. The 'Received' date is '4/10/2014'. A table of 'Unpaid Charges' is visible, with the second row selected. Below the table, the 'Payment Type' is set to 'Credit Card'. Callouts provide instructions: 'Enter amount of direct payment' points to the amount field; 'Allocate the payment (use "Pay" button to allocate the full amount due.)' points to the 'Pay' button in the table; 'Select Payment Type.' points to the 'Credit Card' dropdown; and 'Post the payment to the account once it's been fully allocated.' points to the 'Payment fully allocated' status bar.

Due Date	Name	Charge	Paid	Balance	Due	Payment	
07/12/2013	Licensed Practical Nursing Fees	350.00	300.00	50.00	50.00	0.00	Pay
07/12/2013	Licensed Practical Nursing Supplies	1,251.00	1,031.00	220.00	220.00	220.00	

amt. Due	Tax	Type	Pymt. Plan
0.00	0.00	Service	
50.00	0.00	Service	
0.00	0.00	Service	
220.00	0.00	Service	
0.00	0.00	Service	

Direct Payment (continued)

Now that we have taken a direct payment we can see that payment on both the “Account by Payment” tab and the “Account by Charges” tab (when viewing the detail under the paid charge.)

Notice: A Payment cannot be voided if it has been refunded. Also, a Payment can not be voided after the day it is entered (as it has been deposited).

Payment Recorded
And visible in two
locations

The screenshot displays the ACADEMIX software interface with two tabs: "Account by Payment" and "Account by Charges".

Account by Payment Tab:

Date	Description	Amount	Type	Allocate	Card	Check #	Batch #	Reference
04/10/2014	Paid by Cash	15.00	Cash	<input checked="" type="checkbox"/>			0	Paid by Cash

Account by Charges Tab:

Charges (5)

Post Date	Description	Std. Price	Adj. Price	Qty.	Amt. total	Balance	Amt. Due	Tax	Type	Pymt. Plan	Invoice #
04/09/2014	Achademix T-Shirt	15.00	15.00	1.00	15.00	0.00	0.00	0.00	Service		

Payment Allocations

Date	Payment Info.	Payment Amt.	Receipt #	Activity Information.
04/10/2014	Paid by Cash	15.00	1	Added by: LarryS on 4/10/2014 (1)

Charges (5) (continued)

Post Date	Description	Std. Price	Adj. Price	Qty.	Amt. total	Balance	Amt. Due	Tax	Type	Pymt. Plan	Invoice #
04/09/2014	Location Use Fee	425.00	425.00	1.00	425.00	425.00	425.00	0.00	Service		
04/09/2014	Access Fee	300.00	300.00	1.00	300.00	300.00	300.00	0.00	Service		
04/09/2014	Ax Meal Voucher	120.00	120.00	1.00	120.00	120.00	120.00	0.00	Service		
04/09/2014	Achademix Certification Training	6,000.00	6,000.00	1.00	6,000.00	6,000.00	6,000.00	0.00	Service		

Buttons at the bottom: Add Charge, Invoice, Create Plan, Adjust, Return, Void.

Review Account Payments



Account by Payment			Account by Charges		Financial Assistance					
Payments (9)										
	Date	Description	Amount	Σ	Receipt #	Type	Allocate	Card	Check #	Reference
+ <input type="checkbox"/>	04/28/2016	Paid by Check	65.00		AT2463	Check	<input checked="" type="checkbox"/>		4056	
+ <input type="checkbox"/>	04/03/2017	Billed to WCJVSD - 16-17 Scholarships Award Dis.#4 (4/3/2017) Batch #17SP-SC	250.00		Transfer	Transfer	<input checked="" type="checkbox"/>			Batch #17SP-SC
+ <input type="checkbox"/>	01/03/2017	Billed to WCJVSD - 16-17 Scholarships Award Dis.#3 (1/3/2017) Batch #17W-SC	250.00		Transfer	Transfer	<input checked="" type="checkbox"/>			Batch #17W-SC

While in a Financials Session, it is easy to review the payments on the account by selecting the “Account by Payment” tab.

Columns

- **Date** – Date payment was received
- **Description** – Information about the payments type or source.
- **Amount** – Amount of the payment
- **Receipt #** - The receipt number
- **Allocate** – check indicates that the payment is allocated
- **Card / Check #** - Credit card (last four) or check #
- **Reference** – Additional reference information entered with the payment

Payment Receipt

The information on the receipt explains to the student how much of their total payment was paid to specific charges on their account.

Note that you can reprint a receipt at any time by locating the payment and right-clicking on it.

Northeast Technology Center
6195 W. Highway 20
Pryor, OK 74362
Phone: 918-825-5555

Receipt of Payment

Receipt # A106A

Received By: 3

Daffy Duck

Payment	Method	Received
5/19/2015 Paid by Check	Check# 12011	\$274.00

Charge	Allocation
5/19/2015 Supply Fee - Sem 1	\$75.00
5/19/2015 Welding On-Line Curriculum Access Fee	\$99.00
5/19/2015 Welding Textbooks	\$100.00

Daily Deposit Report by Income Account

This report is to be accompanied by the money received for the day. The amount of money (cash, checks, credit card slips) should all match the totals shown on this report before submission. The Deposit Report can be found under My School > Reports

Daily Deposit Report									
Received: Tuesday, May 19, 2015					Total Deposit \$274.00				
Users: All									
Charged	Charge Description	Account	Paid	Receipt #	User	Cash	Check	Credit	EFT
Cost Center: 0001-002									
5/19/2015	Welding On-Line Curriculum Access Fee	Daffy Duck	5/19/2015	A106A	BrianH		\$99.00		
5/19/2015	Welding Textbooks	Daffy Duck	5/19/2015	A106A	BrianH		\$100.00		
0001-002 Cost Center Totals:					\$199.00	\$0.00	\$199.00	\$0.00	\$0.00
Cost Center: 0001-003									
5/19/2015	Supply Fee - Sem 1	Daffy Duck	5/19/2015	A106A	BrianH		\$75.00		
0001-003 Cost Center Totals:					\$75.00	\$0.00	\$75.00	\$0.00	\$0.00
Totals:						\$0.00	\$274.00	\$0.00	\$0.00
Total Deposit:						\$274.00			

Daily Deposit Report

Received: Tuesday, May 19, 2015
Users: All

Total Deposit \$274.00

Receipt Number

Who received the payment

Method of payment

Charged	Charge Description	Account	Paid	Receipt #	User	Cash	Check	Credit	E
Cost Center: 0001-002									
5/19/2015	Welding On-Line Curriculum Access Fee	Daffy Duck	5/19/2015	A106A	BrianH		\$99.00		
5/19/2015	Welding Textbooks	Daffy Duck	5/19/2015	A106A	BrianH		\$100.00		
0001-002 Cost Center Totals:					\$199.00	\$0.00	\$199.00	\$0.00	\$0.00
Cost Center: 0001-003									
5/19/2015	Supply Fee - Sem 1	Daffy Duck	5/19/2015	A106A	BrianH		\$75.00		
0001-003 Cost Center Totals:					\$75.00	\$0.00	\$75.00	\$0.00	\$0.00
Totals:						\$0.00	\$274.00	\$0.00	\$0.00
Total Deposit:						\$274.00			

Receipt # A106A

Received By: 3

Revenue Account Totals

All information provided on the receipt that is given to the student is also found on the deposit report. This relieves the school of having to print their own copy of the receipt, as:

1. the data is stored in the system and be reprinted at anytime, and
2. the information is submitted on a comprehensive report lessening paper usage (cost of paper/ink/printer maintenance/etc.).

Payment	Method	Received
5/19/2015 Paid by Check	Check# 12011	\$274.00

Charge	Allocation
5/19/2015 Supply Fee - Sem 1	\$75.00
5/19/2015 Welding On-Line Curriculum Access Fee	\$99.00
5/19/2015 Welding Textbooks	\$100.00

This concludes your training exercise.

Achademix: Student Management (Part 1)

In this session, we covered entering student records, tracking required documents and assessment scores, entering notes and registering/enrolling students into classes.

Make sure you understand how to work with students in Achademix and let us know if you have any questions.

Reference Documents

OSB7 - Student Search Directives

OSB8 - Pathway & Class Search Directives

OSB13 - Student Required Document Tracking

OSB17 - Student Status vs. Enrollment Status

OSB21 - External Testing & Assessments

www.Achademix.net



All Processes shown and presented are subject to change without notice.