



Course Confirmations: Setup Guide

A step by step guide on configuring your Course Confirmation template to collect school fees, agreements, donations and responses.

This document outlines:

- ✓ Template set-up
- ✓ Payment Items
- ✓ Agreements & Questions
- ✓ Tracking & receipting payments



What are Course Confirmations in Compass?

This module allows you to create cycles (templates) to collect payments & information for a defined group of students, where you can:

- ✓ Include a range of payment items - either a set amount or an optional amount.
- ✓ Allow payment via pre-defined instalments, using percentages over set dates.
- ✓ Track and monitor the payment status for each student through the portal.

Permissions

Grant your team the right permissions to access and administer the Course Confirmations module, and others with integrate with it, including:

CourseConfAdmin - full access to the Course Confirmations module.

PaymentInstalmentsAdmin - access to administer Payment Plans, and receive emails when an instalment has failed.

PaymentPlansBase - allows the user to view payment plan details but not edit or add payment plans.

CompassPay Portal Login - obtain your login details from your Business Manager or Compass Support to access all transactions and transfers for receipting purposes.

What can I use Course Confirmations for?

Using Course Confirmation's range of payment items, as well as the Agreements & Questions sections, the module can be utilised to take payment, automatically set up payment plans and gather responses.



School Fees

Create and take payment for your school's items, including school fees, essential items and materials.



Donations & Voluntary Contributions

Using the unlocked & minimum online fee features, allow parents to choose their own amount for funds (eg. Library, Building, etc.)



Agreements & Questions

Gather responses and consent for agreements including Media, ICT, Uniform, etc.



Subject Fees

Integrating directly with an export from your timetabling software, allow parents to pay for subjects/electives their students will take.

Step 1 - Set up your Template

Templates allow you to create a payment cycle for a group of students who all need to complete the same batch of items - the same agreements, questions and school fee/payment items.

Step 1a - Name & Academic Group

Templates are grouped within the **Target Academic Year** - select the year these fees relate to.

Depending on your school's needs, you may have multiple templates within each Academic Year - for example, if year levels have different pricing and/or payment items.

Template Name

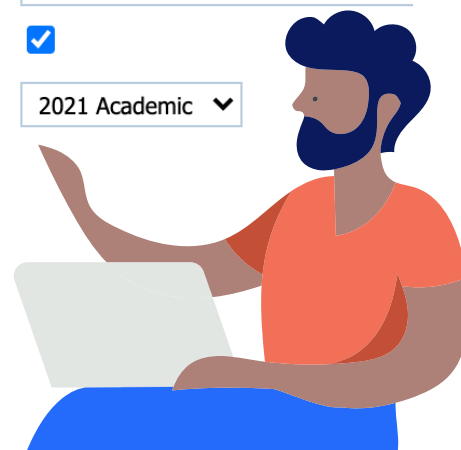
2021 School Fees Year 7-12

Open to parents?



Target Academic Group

2021 Academic ▼



Step 1b - Description/Summary

Here's where you'll provide an overview of the template, letting parents know what to expect.

You may include payment schedules, what's included in each payment item, and how best to complete the form.

Many schools also enter their contact details here for parents to use if they get stuck!

Introductory Comment

Word formatting removed on save.

(Shown to parents at the beginning of the confirmation process)

Dear Parents and Carers,

High School is proud to offer a range of exemplary curricular and co-curricular programs to students across the school. While the Victorian Government supplies most of the school's funding, this is not sufficient to meet all the costs of the school's programs. All schools are dependent on locally raised funds to supplement government funding for curriculum programs, school services and resources. Locally raised funds in the form of parent contributions are essential for the operation of the school's extended learning program, specialist staff and the provision of additional equipment.

Parent Payment Policy

The Department of Education and Training (DET) Parent Payment Policy provides advice on the different types of payments that schools may request from parents and outlines the procedures and protocols to which schools must adhere. The High School Council is responsible for developing and approving a school-level parent payment arrangement that is compliant with the Department's policy. The DET policy is available here <https://www2.education.vic.gov.au/pal/parent-payment/policy> or a hard copy is available on request from the general office.

Financial help arrangements

High School offers a range of supports to families who are experiencing financial hardship and are unable to make the parent payment. The DET also provides a range of supports to families that will complement the school supports. The school-based arrangements could include establishing payment instalment plans and providing access to school resources.

Step 1c - Open to Parents

When your template has been completed, and you're happy to let parents begin accessing and completing the Course Confirmation - tick the **'Open to Parents' option**. Don't forget to also click 'Save' at the bottom of the screen to update the template.

This alerts the parent to the template via a dashboard **notification**. Some schools also send out a News Feed post or email to further notify their parents.

Course Confirmation Template	Created	Condition Flagging	Open?	Remove
2020 School Charges: Year 7 - 10	11/07/2019	[Select Condition] ▼	<input type="checkbox"/>	✖
2020 School Charges: Prep - Year 6	11/07/2019	[Select Condition] ▼	<input type="checkbox"/>	✖
2020 School Charges: Year 11 & 12	18/08/2020	[Select Condition] ▼	<input type="checkbox"/>	✖
2020 Laptop Charges	12/11/2020	[Select Condition] ▼	<input checked="" type="checkbox"/>	✖

Quick Tip!

See which templates are open to parents in bulk from the Course Confirmations Dashboard.

Step 2: Payment Items

Step 2a - Payment Plans (optional)

Tick the 'Allow parents to pay via a Payment Plan' box to allow parents to opt for paying via instalments, instead of all at once.

Add your instalment dates as needed. For example, you may add four instalment dates for each term, and split this up into 25% for each date.

Quick Tip!

Be notified when a payment instalment has failed 3 times - to chase this up with the parent!




Don't see this option?

Ask our team about our **Payment Plans** module today!

Payment Plans

We have detected that you have the instalment payments module enabled in Compass. Would you like to allow parents to setup instalment payments (as an alternative to paying everything up front and in full)?

- ☒ Allow parents to pay via a Payment Plan
- ☐ Force subject levies to be paid up front
- ☐ Force subject levies to be paid on first billing date
- ☐ Subject levies are distributed across the billing dates
- ☒ Fixed instalments with charges calculated by a percentage of the total

Add Instalment Date		Delete Selected Instalment Dates	
<input type="checkbox"/>	Charge Date	Charge Percentage (%)	
<input type="checkbox"/>	10/09/2020	33	
<input type="checkbox"/>	18/09/2020	33	
<input type="checkbox"/>	26/09/2020	33	

Step 2b - Per-Subject Charges

Course Confirmations allows you to generate specific charges to students based on their subject selections for that year.

For example, if the Food Technology elective is \$20, you can import student subject selections into the template - so the right students are charged applicable elective costs on top of their other payment items.

Export your student's enrolments from your timetable package, and import this file into the template to update everyone in one go! For more information and step by step guidance, search our Knowledge Base.

Step 2c - Payment Items

These are items that are to be paid for by the parents of each student included in the template.

You can add payment items with a set amount that **cannot be adjusted by the parent**, or ones that have a suggested amount that **can be adjusted by the parent** (Building fund donations etc).

<input type="checkbox"/>	Title	Sug	Def	MOF	Lkd?	Tax D	GST?	#	
<input type="checkbox"/>	Essential Items	\$0.00	\$125.00	\$0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	
<input type="checkbox"/>	Sports Equipment Contribution	\$75.00	\$50.00	\$10.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2	
<input type="checkbox"/>	Campus Library Contribution	\$75.00	\$50.00	\$10.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	3	
<input type="checkbox"/>	Voluntary Building Fund Donation	\$25.00	\$5.00	\$0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4	

Suggested fee (Sug)	Default Fee (Def)	Minimum Online Fee (MOF)	Locked (Lkd)	Priority (#)
Ideal amount for the parent to pay. This displays as 'Recommended' and cannot be edited by the parent.	Displays as an auto-filled value in the Amount field - this can be edited if not locked.	The minimum amount the parent can pay for this item. Leave at \$0 if optional, and the correct amount if locked.	Ensures the parent cannot change the Default amount. 'Fixed' will display next to the item name.	Determines the order which the payment items appear.

Step 3: Agreements & Questions

Step 3a - Agreements

Use the Agreements section to include mandatory school documents or policies that your community needs to be aware of.

Add an Agreement, including the title and information. Then, tick whether students and/or parents should sign.

Agreements
<button>Add Agreement</button>
Title
Acceptable Use Agreement for Internet and Digital Technologies
ICT Agreement
Privacy Agreement

Step 3b - Questions

Set up questions you'd like parents to answer as part of the process.

You can also associate these with agreements, if need be, and see these answers easily through the Additional Questions Export!

Parent Agreement	
Agreement	<input type="radio"/> I have read and accept the agreement above. <input checked="" type="radio"/> I have not yet read/do not accept the agreement.
Full Name	<input type="text"/>

Quick Tip!

You can copy your Agreements & Questions into each template - use the same ones each year!

Step 4: Add your students

From the **Selected Students** tab, add the relevant students to your Course Confirmations template.

This might be the whole school, or a specific year level, depending on the payment items, agreements and questions included.

Step 4a - Add by a Cohort

Like other Compass modules, use the inclusion boxes to add students within a specific year level, form group, house, class or ID code.

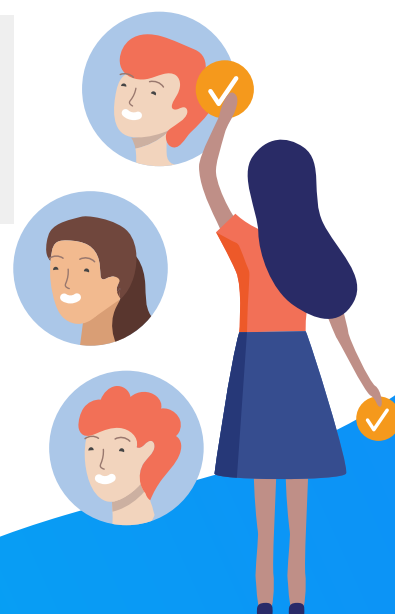
The 'add individual' section is useful for adding students who may enrol after you've already published your Course Confirmations template.

Add Individuals	<input type="text" value="Type a student/staff name/ID"/>	<input type="button" value="Add"/>
Add By Group	<input type="button" value="All Years"/> <input type="button" value="All Forms"/> <input type="button" value="All Houses"/> <input type="checkbox"/> Include Future Students	<input type="button" value="Add"/>
Add By Class	<input type="text" value="All Classes"/>	<input type="button" value="Add"/>
Bulk Add ID Codes	<input type="text" value="Type comma-separated ID codes e.g. AAA0001,BBB0002,CCC0003"/>	<input type="button" value="Add"/>

Step 4b - Manually set status (optional)

If a parent has paid manually at the office, or via other means, tick the student's name, and set status to complete for selected.

This will avoid any confusion, and ensures the parent won't be asked to pay through Compass if they've paid externally.



Step 5: Administer your Payments



As payments are made by parents, either in full or via a payment plan, you're able to track and receipt these quickly and easily. Each transfer provides a clear breakdown of each transaction's details.

All payments are **processed through CompassPay** via daily transfer batches to your school's bank account.

Step 5a - Track Payment Status

As families complete their Course Confirmation, or staff set these manually, the status column on the **'Selected Students'** tab of the template updates to indicate where the parent is up to in the process.

To view specific payment details for a student, locate them in the list and **click the magnifying glass icon** to expand the details.

Set Status: Complete									
Selected		All		Detailed CSV Export		Summary CSV Export		Delete: Selected All	
<input type="checkbox"/>	ID Code	Last Name	First Name	YL	Form	Complete	CPay Date	CPay ID	
<input type="checkbox"/>	ALE0002	BESGROVE	Bailey	10	10A	Awaiting Payment			
<input type="checkbox"/>	ALL0014	ALLEN	Michelle	1	01B	In Progress			
<input type="checkbox"/>	AND0027	BOURKE	Bryce	10	10A	Complete via Payment Plan			
<input type="checkbox"/>	ARD0005	CARSON	Bradley	10	10C	Not Started			
<input type="checkbox"/>	ARM0013	CHANG	Brandon	10	10A	Awaiting Manual Payment			
<input type="checkbox"/>	ASH0004	CLARK	Kenneth	10	10A	Complete			



Not Started	The Course Confirmation has not been opened/viewed.	Awaiting Manual Payment	Parent has opted to pay manually at the office & downloaded the form.
In Progress	Parent has started the Course Confirmation cycle but has not completed it.	Complete	Payment is complete in full.
Awaiting Payment	Parent has worked through the cycle to the final payment stage but not yet paid.	Complete via Payment Plan	Parent has chosen to pay using instalments and completed their details.

Step 5b - Receipt Payments

Payments made by parents through Compass are transferred to your school's bank account via daily CompassPay transfers.

Each daily transfer list itemises the transactions received, allowing for simple tracking and receipting. Using the download file, you can **rapid receipt these automatically into CASES21**.

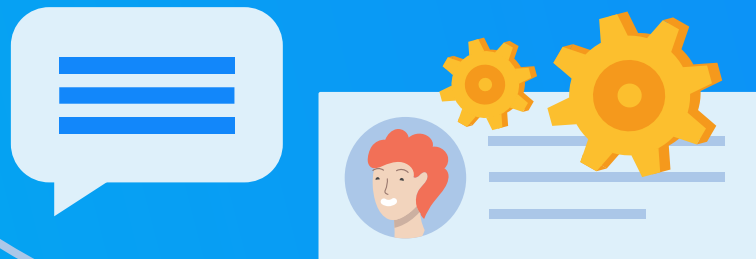
Course Confirmation / Payments	10/01/2021	END0002	\$1,235.00	Course Confirmation for
COURSECONF: [REDACTED]	4:00 PM			END0002, 09B
				Paid by Mr [REDACTED]
				2021 Year 9
				SCIM - \$0.00
				SCRA - \$0.00
				SENG - \$0.00
				SETE - \$40.00
				SEHA - \$0.00
				SEHM - \$0.00
				SEMT - \$0.00
				SEMD - \$15.00
				SEOD - \$250.00
				SEPD - \$0.00
				SSCI - \$0.00
				Building Fund - Voluntary - \$100.00
				Library fund - Voluntary - \$20.00
				Grounds Contribution - Voluntary - \$30.00
				Chaplaincy fund - Voluntary - \$0.00
				General Donation - Voluntary - \$100.00
				School Magazine - Optional - \$0.00
				Mathspace Program - \$10.00
				Science Levy - \$35.00
				21st Century Learning Levy - \$25.00
				Home Economics Apron & Hat (Optional only if required) - \$0.00
				Curriculum Items - \$500.00
				Student Support Services - \$110.00

Here's an example Course Confirmation payment showing in the CompassPay Transfer Batch.

You can see the student's breakdown, including what the parent has chosen to pay for each item, and subject fees if applicable.

Australian Mathematics Competition (69657) - \$6.50	\$97.50	15
Purchase of the Volleyball Playing Top (69693) - \$50.00	\$1,700.00	34
Volleyball Program Player Training Contribution (69280) - \$60.00	\$360.00	6
Year 8 AFL (66142) - \$15.00	\$15.00	1





Top Tips & Tricks

from our School Fees experts

✓ Exports

Detailed CSV Export - breakdown of all payments within the template, broken down by students.

Summary CSV Export - shows all templates and students, with their payment status. For example, this can be useful to identify all the families who are on Awaiting Payment, to see if they need help.

Additional Question Report - export all answers to the questions within the template in one go.

✓ Flexible Payment Plans

All Payment Plans can be manually adjusted as needed, through the **Payment Plans Dashboard** (via Grid icon). You can either set up a new plan from scratch, or edit an existing plan to update the instalment dates and amounts, or add/delete as needed.

Perfect for adjusting plans to suit an individual family's needs, or seeing what's left to pay.

You have 1 failed instalment requiring action.

Date	Amount	Status	Attempts	
03/02/2021	\$375.00	Succeeded	1/3	
15/03/2021	\$500.00	Failed	3/3	
19/07/2021	\$375.00	Pending	0/3	

Add Instalment(s)

First Instalment: 05/07/2021

Amount (\$): 1.00

Repeat: ☐

Repeat method: ☐ Bill amount on each repeat. ☐ Split amount evenly over instalments.

Repeat pattern: Every: 1 week(s) until: 05/07/2021

Repeat on days: ☐ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat ☐ Sun

Total amount: \$1.00

✓ Future Students

Add your future students to their Course Confirmation template within the Selected Students tab - just tick the 'include future students' box when adding. As long as you've provided the relevant parents with their login details, they'll be able to complete the template regardless of the student's status.



← Course Confirmations

Course Confirmation/Payment: 2021 School Fees Year 7-12

Dear Parents/Carers,

[See More]

✓ Compass App Integration

Course Confirmations can be easily paid for within the App - anytime, anywhere.

Parents will see a notification for an open template, and are able to complete all questions, agreements and payment through their mobile device.

← Course Confirmations

Compass

Course Confirmation and Payments

Click on a course confirmation/payment process below to proceed.

Confirmation/Payment Process	Status
2021 School Fees Year 7-12 - CARSON, Bradley (ARD0005)	Not Started

*Completed via payment plan.

General Payment Items

Click on the title of an item for more information.

*Note: the table below is scrollable sideways.

Item	Recommended	Amount
Essential Items	(Fixed)	\$125.00
Sports Equipment Contribution	\$75.00	\$50.00
Campus Library Contribution	\$75.00	\$50.00
Voluntary Building Fund Donation	\$25.00	\$5.00
Total for this section:		\$230.00

Enter Payment Details

If you have any questions,
please call 03 9005 5217 or
email support@compass.education

www.compass.education

Are your Course Confirmations all ready to go?

Template Setup

- ☐ Create your Course Confirmation **template** (if applicable, additional templates if fees vary)
 - ☐ Assigned to the correct **Academic Year**
 - ☐ Has a **name** that makes sense for staff and parents (eg. 2022 School Fees Year 7-12)
 - ☐ **Descriptions** are completed (eg. include payment schedules, information, contact details)
- ☐ **Payment items** have been added, using the right configuration
 - ☐ **Essential/Locked Items** (eg. school fees, levies, mandatory programs)
 - ☐ **Voluntary items** and/or contributions (donations, magazines, uniform items)
 - ☐ Your **Subject Fees CSV** has been imported from your timetable (if applicable)
 - ☐ Each item has a **description** (if applicable)
 - ☐ **Payment Plan** option added and completed (if applicable)
- ☐ **Agreements** added (if applicable - eg. ICT, Media Consent, Bullying)
- ☐ **Questions** added (if applicable - eg. instrumental, volunteering, language)
- ☐ **Students** added (ensure these are the right students for this year)

Parent Rollout

- ☐ Tick **Open to Parents** from the Basic Template tab
- ☐ **Alert your parents**
 - ☐ Use our **recommended News Feed** post
 - ☐ Attach our **Parent Guide** to paying for Course Confirmations
 - ☐ **Track payment status and receipt payments** throughout your fee collection

