

2018-2019 Tuition Management Office (TMO) Tuition & Billing Policies and Process

TUITION AND FEE BILLING OUTLINE	2
TADS Enrollment and Registration Fees	2
Smart Tuition Billing	2
PAYMENTS, CREDITS, & REFUNDS	3
Payments Received at School	3
Refunds- Smart Tuition	3
Refunds- TADS	3
FOLLOW-UP, LATE FEES & WAIVERS	4
Follow-up Turned Off	4
Late Fee School Waiver Allotment	4
Waivers	4
Late Fees Resulting from Delay in Scholarship Posting	4
FEES & DISCOUNTS CATEGORIES	5
Employee Student Discount	5
One-Time/Non-Recurring Fees	5
SCHOLARSHIPS AND FINANCIAL ASSISTANCE	6
Verification and Award Adjustments	6
Local Scholarship Processing (under development)	6
Application on Split Tuition Accounts	6
ACCOUNT CHANGES, WITHDRAWALS/ENROLLMENT & REFUNDS	7
Early Withdrawals	7
Late Enrollment / Transfers	7
SPECIAL PAYMENT PLANS	8
APPENDIX 1 - LIST OF APPROVED DISCOUNT, FEE AND GRADE CATEGORIES	9
APPENDIX 2 - KEY CONTACTS ENROLLMENT-FINANCE-TUITION	10
APPENDIX 3 – SMART COMMUNICATION STANDARDS	11
APPENDIX 4 -TADS PARENT REGISTRATION REFUND FORM	12
APPENDIX 5 - SMART TUITION PARENT REFUND FORM	13
APPENDIX 6 - FAMILY COMMUNICATIONS –TEMPLATES	14
PAYMENT NOT RECEIVED ON RECENT BILLING	14
2nd LETTER – TWO MONTHS IN ARREARS	15
2nd LETTER – TWO MONTHS IN ARREARS AT PROGRESS REPORT TIME	16
NO RESPONSE TO 2nd LETTER - RESULTING IN SUSPENSION	17
PAYMENT PLAN FORM	18

2018-2019 Tuition Management Office (TMO) Tuition & Billing Policies and Process

TUITION AND FEE BILLING OUTLINE

TADS Enrollment and Registration Fees

Annually, enrollment registration fees are required for all students who will be attending a tuition based program at the school. Tuition based programs include, but are not limited to, pre-kindergarten, K-8 and wrap-around classes. Incentive rates may be offered for early enrollment. The registration fee must be paid for each student in order to secure that child's seat in program for the related school year.

If a student transfers to another GRSS school, either school may elect to waive the registration fee.

A student is only to pay for one registration fee per year if they stay within the Regional System. Please contact your TMO Relationship Manager to have the changed completed.

Smart Tuition Billing

- ❑ NEW families must apply in TADS for admission; upon acceptance they will receive a link in an email to register in TADS Enrollment. (Questions about TADS Enrollment should be directed to TADS parent call center at 855-318-1213)
- ❑ ALL families must enroll in TADS and pay the applicable registration fee.
- ❑ The Tuition Management Office (TMO) will be responsible for transferring the enrolled students to Smart Tuition and apply billing information.
- ❑ All new families will receive an e-mail from Smart Tuition asking them to confirm their information prior to the billing creation. This step will not only help in securing the families acknowledgement of late fees and other policies, it will provide information as to the families who have not complied and allow for direct outreach to make sure they are receiving their e-mail notifications.
- ❑ Prior to activating billing for families the TMO will provide schools with a roster of all the students who have paid their registration fee and new students that have confirmed their smart tuition billing information for review and approval.
- ❑ The TMO will prepare a welcome communication to all families who have billing set up and are activated. (This communication will ask returning families to confirm their billing options that have rolled over.)
- ❑ As TMO is informed of financial aid awards they will be added to the billing accounts. Financial Assistance inquiries should be addressed to 646-794-3318.

NOTE: Initial welcome communication should be sent no later than the first week of June and schools will receive a copy of the communication before it is issued. As noted above, for returning families all the information in SMART will remain the same as is currently set up in SMART except where payment plans have changed. **NEW** families will receive an email from SMART asking them to confirm.

2018-2019 Tuition Management Office (TMO) Tuition & Billing Policies and Process

PAYMENTS, CREDITS, & REFUNDS

Payments Received at School

No tuition/fee payments should be collected at the school, even in the form of money orders to be sent on to SMART. Families should be encouraged to take responsibility for sending payments to SMART directly if they do not use direct debit, payment centers or online options.

Refunds- Smart Tuition

In the event a family is owed a refund:

- Parent is to submit a written notice of withdrawal and refund request to the school
- School must contact TMO to determine the appropriate amount
- School is to fill, sign and send the Parent Refund form to TMO with parent written request
- Relationship Manager reviews, signs and hands form to TMO Director for signed authorization
- Relationship Manager sends approved form to Smart to be processed
- The original payment method will be refunded*
Note: if the original method of payment was a check the address on file will be used. If the parent wishes to have the check mailed to a different address the school must verify and state, the change on the form. The address on the account will be updated.
- Smart updates the account, adds a note and emails the family once the refund was processed
- TMO updates the school of the refund

Refunds - TADS

Only in special cases will a registration fee be refunded. These are very rare and require the following steps:

- Parent is to submit a written request to the school
- School is to fill, sign and send the special TADS refund form to TMO
- Relationship Manager reviews, signs and hands form to TMO Director for signed authorization
- Relationship Manager sends approved form to TADS to be processed
- The original payment method will be refunded

Note: The address on file is used for a check refund. If the parent wish to receive the check to a different address the school must be specific and confirm the address. The address on the account will be updated.

2018-2019 Tuition Management Office (TMO) Tuition & Billing Policies and Process

FOLLOW-UP, LATE FEES & WAIVERS

Follow-up Turned Off

Family will not receive any notifications when they fall behind and there will be no late fees assessed. **This is a long-term not a one-month option and school is responsible for doing all follow-up with the family. RFM's need to be aware of these requests because the follow up function is turned off and they are responsible to review and follow up with the schools about their delinquency reports.**

Late Fee School Waiver Allotment

Each school has an allotment of waivers that equals 10% of their registered families. This allotment is contractual-and the school can use without financial penalty, but **once a late fee has been paid by a family it cannot be waived**. Late fee waivers should be selective and should not be waived without a serious review from the school.

Waivers

Waiving follow up means that the family will not receive any correspondence from Smart on their account or any reminder emails about their past due amounts.

- ❑ **Waiving the Late Fee and Follow up Processing:** (These should be VERY RARE)
 - School needs to explain the family's hardship
 - Specify number of months to waive the late fee and follow up calls

Late Fees Resulting from Delay in Scholarship Posting

Scholarships are manually reviewed prior to being applied into the Smart accounts. In order to waive a late fee, the family should be paying their tuition and account will be adjusted accordingly.

To avoid incurring a late fee due to waiting for scholarship to reflect tuition account:

- ❑ TMO should be notified in advance of billing date in order for follow up to be turned off for the month
- ❑ Families should pay at least \$200 per student per month until the scholarship is posted
- ❑ Families who **do not pay anything** towards their tuition while waiting for a scholarship to be awarded or posted into their tuition account **will not have their late fees waived**

2018-2019 Tuition Management Office (TMO) Tuition & Billing Policies and Process

FEES & DISCOUNTS CATEGORIES

Fee and Discount categories have been standardized across all GRSS schools. See Appendix 1 for a complete list of approved items.

- ❑ When sending request for discount, fee or scholarship addition please provide the appropriate category name

If there is a category that your school needs and cannot be placed in any of the categories listed, please email TMO for review and approval

Employee Student Discount

In order to apply an Employee Student Discount:

- ❑ School must email both the Regional Finance Manager (RFM) and TMO with Employee name, role in school and names of any/all children
- ❑ The Regional Finance Manager must confirm to the TMO the employee status as bargaining or non-bargaining
- ❑ The discount will be prorated if the student does not attend full time and is not available for UPK students

Please note: a student who has an Employee Student Discount can also receive financial aid/scholarship.

One-Time/Non-Recurring Fees

Fees types:

- ❑ Before & After school Fees
- ❑ Snack/Meal Fees
- ❑ Optional Fundraising Fees
- ❑ Family Participation Fees
- ❑ Out of state Book/Classroom Supply Fees

Applying the fees:

- ❑ Ask your Smart Account representative or your Relationship Manager and they will provide you with your school excel template.
- ❑ Download your school's A/R billing roster and only keep the following columns name: Family ID, Family Name, Student First and Last name and Grade.
- ❑ Send the completed spreadsheet to your Smart representative 4 days after your due date to be included in the upcoming month's invoice.

Schedule for submission:

Smart Tuition generates and mails out tuition invoices 20 days prior to the school due date. In order for a charge to be included on a bill the submission must be by the due date below:

- ❑ Family payment due on 1st the spreadsheet is due on the 5th of the preceding month
- ❑ Family payment due on 5th the spreadsheet is due on the 9th of the preceding month
- ❑ Family payment due on 10th the spreadsheet is due on the 14th of the preceding month
- ❑ Family payment due on 15th the spreadsheet is due on the 19th of the preceding month
- ❑ Family payment due on 20th the spreadsheet is due on the 24th of the preceding month
- ❑ Family payment due on 25th the spreadsheet is due on the 29th of the preceding month

This schedule allows Smart to enter the information and gives the school time to review the charges before the bills are generated and sent to the families.

2018-2019 Tuition Management Office (TMO) Tuition & Billing Policies and Process

SCHOLARSHIPS AND FINANCIAL ASSISTANCE

Types of scholarship and financial aid that are applied throughout the GRSS schools:

- ❑ GRSS Financial Assistance
- ❑ Children's Scholarship Fund
- ❑ Inner City Scholarship Fund
 - Be A Student's Friend
 - Cardinal Egan Italian Scholarship
 - Emergency Tuition Assistance
- ❑ Third party Scholarships:
 - Kremer Foundation
 - Columbus Citizen Foundation
- ❑ Local Scholarship:
 - Alumni
 - Local Benefactor
 - Board Approved
 - Parish
 - School Scholarship

Verification and Award Adjustments

All Financial Aid and Scholarship awards must be verified by the TMO before being posted to a billing account. If a student receives any Financial Aid or Scholarship that causes the family to pay less than **25% of their net tuition** (tuition after all the discounts and other grants have been applied) TMO will contact the school and the issuer to remedy.

Many scholarships and financial awards are based on net tuition and will be directly impacted by changes to a student's tuition after billing has been set up. In these cases, an adjustment to the award will be required.

Local Scholarship Processing (under development)

Application on Split Tuition Accounts

If a student has split tuition account, any grant, financial aid or scholarship will be divided amongst the tuition accounts as indicated in the student's record. A scholarship is given to the student and must be applied to the tuition accounts properly.

2018-2019 Tuition Management Office (TMO) Tuition & Billing Policies and Process

ACCOUNT CHANGES, WITHDRAWALS/ENROLLMENT & REFUNDS

In order to avoid family confusion and potential late fee assessments, Changes, Additions and Withdrawals must be sent to the TMO and Smart as they occur. Send the updates to TMO, copying the Director of Enrollment and Regional Finance Manager.

Early Withdrawals

- ❑ School must notify both TMO and SMART Tuition with the Student's:
 - **Name**
 - **Smart Billing Account number**
 - **Grade**
 - **Last day at school**
- ❑ Families will be billed for **a full month** if the student attends any part of the month
- ❑ TMO will send the school and SMART the updated breakdown of the balance, credit and or refund that needs to be processed.

Note: if the withdrawal is only part of a family and only one student in a family remains enrolled, the remaining student will require an adjustment to their family grant award.

Late Enrollment / Transfers

- ❑ Family must apply for admissions in TADS and be accepted by the school
- ❑ Upon acceptance, family must register/enroll in TADS and pay the registration fee before a SMART billing account can be created
- ❑ Once the smart account is set up, TMO will breakdown the billing for tuition and allocate any grants accordingly
- ❑ Families will be billed for **a full month** if the student attends any part of the month
- ❑ TMO will also request recalculation of any scholarships before adding them into account if necessary

2018-2019 Tuition Management Office (TMO) Tuition & Billing Policies and Process

SPECIAL PAYMENT PLANS

To prevent delinquency, many schools have open communication with their families. Standard communication templates have been provided in the appendix.

- ❑ To the extent possible a special payment plan should have the balance paid it off before the school year ends.
- ❑ Any tuition balance at the end of the school year will result in having the balance rolled over to the new school year and billed on top of the new year's tuition

When a payment plan or payoff agreement has been finalized with a family, TMO must be notified immediately and a note must be created in SMART for everyone to know the new payment plan.

- ❑ The School is to notify TMO and RFM of the new plan.
- ❑ In the email about the plan to TMO
 - Add a note titled: **PRIOR YEAR PAYMENT PLAN IN PLACE** – and reference the terms of the plan or attach the document

Note: Failure to have all the details in SMART relative to agreed payment plan will cause misinformation, misdirection and frustration to all parties involved.

2018-2019 Tuition Management Office (TMO)

Tuition & Billing Policies and Process

APPENDIX 1 - List of Approved Discount, Fee and Grade Categories

18-19 Fee Categories
Activity Fee PK(Fee)
Activity Fee(Fee)
Additional Fundraising
Allocated Tuition Due(Fee)
Before/After School Fee(Fee)
Before/After School Fee Adjustment(Fee)
Before/After School Program Fee
Before/After School Registration Fee(Fee)
Book/Classroom Supply Fee(Fee)
Book/Classroom Supply Fee PK(Fee)
Family Participation Fee(Fee)
Field Trip Fee(Fee)
Fundraising Fee PK(Fee)
Fundraising Fee(Fee)
General Fee PK(Fee)
General Fee(Fee)
Graduation Fee PK(Fee)
Incidentals Fee
K-8 Tuition
Kindergarten Tuition Adjustment
Late Fee
Meal/Snack Fee
Parent/Home School Association Fee(Fee)
Payment Plan Billing
Pre-K Tuition
Prep Course/Test Fee
Refund Issued by School(Fee)
Returned Check Fee
Sent to Collections
Technology Fee PK(Fee)
Technology Fee(Fee)
Tuition Reallocation(Fee)

18-19 Discount Categories
Alumni Scholarship(Discount)
Archdiocese Family Grant(Discount)
Benefactor Award(Discount)
Board Approved Aid
Cardinal Egan Italian American Award
Children's Scholarship Fund Award(Discount)
Columbus Citizens Award(Discount)
Credit Balance From Previous Year
Deposit
Early Withdrawal Offset(Discount)
Emergency Tuition Assistance
Employee Student Discount(Discount)
Financial Assistance/Scholarship(Discount)
Kremer Foundation Award(Discount)
Late Enrollment Offset
Legacy Grant(Discount)
Other Discounts(Discount)
Other Scholarship(Discount)
Parish Scholarship(Discount)
Payment Plan Offset
Referral Program
Registration Transfer Credit(Discount)
School Scholarship(Discount)
Sent to collections
Total Admin Display Fee
Total Smart Fees
Transfer Grant(Discount)
Tuition Reallocation(Discount)
Tuition Allocated to Other(s)- Offset(Discount)

Approved Grades for 2017-2018			
Grades	Comment	Grades	Comment
UPK	This is the Wrap Around program	Dismissed	
PK4		Withdrew	
PK3		Cancelled	
PK2	2 schools with Nursery program	1-8	

2018-2019 Tuition Management Office (TMO) Tuition & Billing Policies and Process

APPENDIX 2 - Key Contacts Enrollment-Finance-Tuition

Region	Tuition Management Relationship Manager -	Regional Superintendent Office	Regional Finance Manager	Director of Enrollment	Current SMART Account Rep.
Central Westchester	Phyllis D'Arrigo	Dr. Noelle Beale, Ph.D	Ann Golia	Kathleen Gallagher	Kyle Nitti
Dutchess	Phyllis D'Arrigo	Ms. Mary Jane Daley	Michael Egan	Patty Ryan	Kyle Nitti
East/NE Bronx	Lionel Thomas	Mrs. Linda Dougherty	Jessie Martinez	Jodian Davis	Kyle Nitti
Manhattan	Lionel Thomas	Mr. Damian Hermann	Paul Rich	Carol Martino	Kelly Castano
Northern West/Putnam	Phyllis D'Arrigo	Ms. Mary Jane Daley	Michael Egan	Patty Ryan	Kelly Castano
Rockland	Phyllis D'Arrigo	Ms. Cathleen Cassel	Mary Gallagher	Kelli DeRocha	Kelly Castano
South/NW Bronx	Kenny Marrero	Mr. John Riley	Claudia Cabello Glass	Natalia Palmarini -	Annie Sayyed
Staten Island	Kenny Marrero	Ms. Zoilita M. Herrera	Charles Sabella	Diana Gatto	Heather Niven
USO	Phyllis D'Arrigo	Ms. Cathleen Cassel	Mary Gallagher	Kelli DeRocha/ Patty Ryan	Kelly Castano

2018-2019 Tuition Management Office (TMO) Tuition & Billing Policies and Process

APPENDIX 3 – Smart Communication Standards

With 20,000 enrolled students in our regional schools, we are beginning to see where some request requires more time to be answered due to lack of proper communication.

When sending communications between our offices and schools keep in mind that including easy to read and accurate information will help your request get processed faster. Email regarding reviewing billing, scholarship or multiple rows of information, please provide a spreadsheet. Below is a simple example of what would be helpful when sending information on student accounts.

All reports in Smart can be downloaded to excel, if you wish to protect columns we can provide you with the steps to keep the columns un editable.

Smart ID	Student Name	Grade	Columns or columns of the issue	Description of problem/Actions to be taken	School comments

Providing the smart id and the child's name will help everyone. If you are inquiring about scholarships also include the TADS reference number.

2018-2019 Tuition Management Office (TMO) Tuition & Billing Policies and Process

APPENDIX 4 - TADS Parent Registration Refund Form



March 23, 2018

Parent Registration Refund Request – TADS

Registration Fees are non-refundable except through special requests.

Special requests require the review and approval from the Tuition Management office (TMO)

School Information

School Name: _____ Catholic School Region: _____

Student Information

Student Name: _____ Grade: _____

Address*: _____

Phone: _____

*Refund issued to the original method of payment.

Reason for Refund

_____ Duplicate Payment _____ UPK Enrollment _____ School Cannot Accommodate the Student

_____ Other (Describe Below)

If Withdrawn:

Has TADS Admission-Enrollment Status been updated? _____ Yes _____ No

Has TADS Educate Status been updated? _____ Yes _____ No

Approved by School Principal: _____ Date: _____

Approved by TMO Relationship Manager: _____ Date: _____

Approved by Director of TMO: _____ Date: _____

For Office Use Only:

School TADS ID: _____ Registration ID: _____ Billing Acct#: _____ Invoice # _____

Date received: _____ Date sent: _____ Date processed: _____ Initials: _____

Refund Fee charge: _____ Arch _____ School _____ Parent

2018-2019 Tuition Management Office (TMO) Tuition & Billing Policies and Process

APPENDIX 6 - Family Communications - Templates

PAYMENT NOT RECEIVED ON RECENT BILLING

Dear (family),

Smart Tuition has advised us that there is a past due balance related to your student(s) tuition and fees for the current academic year. This payment of \$(amount) was due on (date).

As a reminder, it is the school's expectation that all tuition and fees be paid on time. Failure to do so creates a tear in the partnership we have with parents. At the same time, we recognize that a family can experience temporary financial difficulty due to the loss of employment, illness, or other factors beyond the family's control. In such cases, it is the responsibility of the family to contact us to work out arrangements.

The following is an excerpt from the school tuition policy:

DELINQUENCIES

If tuition and fees cannot be paid on time, families must communicate with school administration in writing to prevent enforcement of delinquent tuition procedures.

- Families who are delinquent will receive a letter from Smart Tuition immediately following the due date.
- Families whose tuition payment is delinquent 60 days will receive a second letter; this letter will come from their principal. If a parent/guardian does not contact the principal within two weeks of receiving this letter, the child/children may not be permitted to attend classes.
- Records and report cards will not be transmitted at this time and financial aid/scholarships provided will be at risk and may be rescinded.
- Students with delinquent tuition payments may not participate in school activities and graduation ceremonies.

We thank you for prompt attention and look forward to your continued support of your child(ren)'s education at (school).

If you have already made a payment, please disregard this letter.

Sincerely,

(principal)

2018-2019 Tuition Management Office (TMO) Tuition & Billing Policies and Process

2nd LETTER – TWO MONTHS IN ARREARS

Re: Delinquent Tuition \$(amount)

Dear (family),

Although we/Smart Tuition have written to you previously, you are now 2 months behind in paying your student(s) tuition and fees for the current academic year. As of today, your total balance past due is \$(amount).

In order to remedy this situation, you must:

1. Contact the school office by (date) to schedule a meeting with me or the Regional Finance Manager (name) to discuss your account by (date) your child(ren) will not be permitted to attend classes.
2. Make at least a \$(amount) payment on your Smart Tuition account.

Failure to comply with the above will result in your student's suspension from classes.

As a reminder the (school) tuition policy states:

DELINQUENCIES

If tuition and fees cannot be paid on time, families must communicate with school administration in writing to prevent enforcement of delinquent tuition procedures.

- Families who are delinquent will receive a letter from Smart Tuition immediately following the due date.
- Families whose tuition payment is delinquent 60 days will receive a second letter; this letter will come from their principal. If a parent/guardian does not contact the principal within two weeks of receiving this letter, the child/children may not be permitted to attend classes.
- Records and report cards will not be transmitted at this time and financial aid/scholarships provided will be at risk and may be rescinded.
- Students with delinquent tuition payments may not participate in school activities and graduation ceremonies.

We thank you for prompt attention and look forward to your continued support of your child(ren)'s education at (school).

Sincerely,

(principal)

2018-2019 Tuition Management Office (TMO) Tuition & Billing Policies and Process

2nd LETTER – TWO MONTHS IN ARREARS AT PROGRESS REPORT TIME

Re: Delinquent Tuition \$(amount)

Dear (family),

Although we/Smart Tuition have written to you previously, you are now 2 months behind in paying your student(s) tuition and fees for the current academic year. As of today, your total balance past due is \$(amount).

Your child(ren) will not receive his/her progress report on (date), because his/her tuition is not up to date.

In order to remedy this situation, you must:

1. Contact the school office by (date) to schedule a meeting with me or the Regional Finance Manager (name) to discuss your account by (date) your child(ren) will not be permitted to attend classes.
2. Make at least a \$(amount) payment on your Smart Tuition account.

Failure to comply with the above will result in your student's suspension from classes.

As stated in the school's tuition policy:

DELINQUENCIES

If tuition and fees cannot be paid on time, families must communicate with school administration in writing to prevent enforcement of delinquent tuition procedures.

- Families who are delinquent will receive a letter from Smart Tuition immediately following the due date.
- Families whose tuition payment is delinquent 60 days will receive a second letter; this letter will come from their principal. If a parent/guardian does not contact the principal within two weeks of receiving this letter, the child/children may not be permitted to attend classes.
- Records and report cards will not be transmitted at this time and financial aid/scholarships provided will be at risk and may be rescinded.
- Students with delinquent tuition payments may not participate in school activities and graduation ceremonies.

We thank you for prompt attention and look forward to your continued support of your child(ren)'s education at (school).

Sincerely,

(principal)

2018-2019 Tuition Management Office (TMO) Tuition & Billing Policies and Process

NO RESPONSE TO 2nd LETTER - RESULTING IN SUSPENSION

Re: Student Suspension from School

Dear (family),

Although we have reached out to you several times regarding the tuition and fees owed for your child(ren)'s attendance at (school) for the current school year, the matter has not been addressed by you.

You currently owe \$(amount) and have not scheduled a meeting with us to discuss terms of payment.

As a result of your continued non-payment we are now forced to suspend (student name(s)) from attending all classes and activities until you:

1. Agree to the attached payment plan, or
2. Pay \$(amount) directly to the school in the form of a bank check.

Sincerely,

(principal)

2018-2019 Tuition Management Office (TMO) Tuition & Billing Policies and Process

PAYMENT PLAN FORM

School Header

Date: _____

Smart Account#: _____

School year: _____

Remaining Balance: _____

Student(s) Name(s): _____

I, _____ agree to the payment option below. By, signing the option I agree and understand I must adhere to the payment plan, I understand my child(ren) will no longer be permitted to attend class until payment is made in full. In addition, if a payment agreement is made and any payment is subsequently missed, your child's education will be suspended until the payments are again current.

Payment Plan:

- (date) pay \$ _____
- (date) pay \$ _____
- (date) pay \$ _____
- (date) pay \$ _____

By signing this agreement, it is understood that if these terms are not met that my child(ren) will be suspended from (school name).

Signed and Accepted

Print Name