TUITION MANAGEMENT NEWS

August 8, 2019

SMART Tuition Access and Training

Mea Culpa – it has come to my attention that the rsvp e-mail address for the training session scheduled for August 7th was incorrect. My sincere apologies to anyone who attempted to respond without success. Another session has been scheduled.

Amie Hollis from SMART Tuition will be hosting a live webinar training session on **Tuesday, August 13th from 10:00AM-11:00AM.**

If you are interested in participating, please contact Kenny Marrero at kenny.marrero@archny.org or 646-794-3413. You will receive a meeting notice with dial-in instructions confirming your attendance on Monday afternoon.

If that date/time is not convenient, but you are interested in SMART training, please let us know that too. We will arrange additional sessions based on your requests. Thank you!

19-20 SMART Account Activation

19-20 tuition accounts continue to be activated as new and returning students complete their enrollment and pay their registration fees. 12,601 families (**16,279** students) have received their SMART welcome letters **AND** first invoices as of today.

Addressing 18-19 Past Due Balances

Our tuition policy clearly states that all prior balances must be cleared in order for a student to begin a new school year.

Our goal is to reduce all balances to zero prior to the end of the fiscal year (8.31.19). Guidelines have been established to allow for certain exceptions; specifically, for balances $1,000.00 or less for families who have **NOT** transferred balances in the past.

Tuition Collection Specialist, Lionel Thomas, is in the process of reaching out to every principal to discuss all remaining 18-19 past due balances so that next steps for each family can be determined prior to the beginning of the 19-20 school year.

Please feel free to contact Lionel directly with any questions or concerns (lionel.thomas@archny.org) or 646-794-3414.

Student Withdrawals

When you are notified by a family that their enrolled child(ren) will NOT be attending in September, please notify your TMO Relationship Manager immediately so that the SMART account can be adjusted according to our Tuition and Fees Policy.

- The student's status must be changed from Enrolled to Withdrawn in both TADs and Educate **BEFORE** the SMART account can be closed.
- If the family has made a payment, has provided a written withdrawal request to the school, and is seeking a refund, please fill out the **attached SMART refund request form** and the request will be reviewed by TMO. Please remember, the SMART admin fee is never refundable.
- Approved refunds are processed by TMO through SMART. Families will receive their refund via the same payment method used to make the payment.

2019-2020 Tuition and Fees Policy (attachment #2)

I have attached the full policy document for your convenience, and it is always available on your school website.

I ask that you pay particular attention to the withdrawal policy, and the tuition obligation for families who choose not to return to school.

- If written notice of withdrawal is received by the school **on or before August 15**, the entire tuition obligation will be waived, and any payments made will be refunded upon written request to the school.
- If written notice of withdrawal is received by the school **after August 15** and the student does NOT attend, 90% of the annual tuition will be forgiven. The family is obligated to pay the remaining balance of 10% of the annual tuition as billed. If payments were made in excess of 10% of the annual tuition, a refund for that amount will be issued upon written request to the school.

I do suggest that you reach out to enrolled families next week with an e-mail and/or IRIS alert reminding them to notify you as soon as possible if their plans change.

Important Information Highlighted in Previous Newsletters

Scroll down to learn more about:

19-20 Account Activation/Tuition Management Calendar
Credit Balances on 18-19 Accounts
Late Fees on SMART Accounts
When Do UPK Students Need SMART Accounts?
PK Tuition
Employee Student Discount – Increase Applied!
Children's Scholarship Fund (CSF)
Third Party Scholarships
Local Scholarships
Credit Card Usage Fee
Approved Fees and Discounts

19-20 Account Activation/Tuition Management Calendar

- Invoices are e-mailed to families 20 days prior to the payment due date. Invoices list tuition, fees, discounts, financial aid and scholarship details by child.
- If parents have questions about their invoices or financial aid that you cannot answer, please encourage them to call the **Parent Call Center at 646-794-3318**. The call center staff has access to TADs and SMART, and can answer most questions for families. The call center staff are bilingual (English and Spanish), and can arrange for translation services if other languages are required.
- Accounts will continue to be created and activated as new enrollments are completed in TADs.

Please Remember: in order to have a SMART account set up, families must have completed the enrollment process and **paid** the registration fee in TADs for **all** of their children. Students who are in ENROLLED status in TADs, but for whom the registration fee is not paid, will NOT have a SMART account set up.

- Please note, there is no longer an option to "mail-in" the registration fee payment to TADs. New enrollments must be completed using a debit/credit card or checking account number. This will reduce delays in SMART tuition account set-up.

Please allow 10-14 days from once enrollment is completed for a SMART account to be activated. Volume is high at this time of the year, but we are working as quickly as possible to activate accounts. Please do not hesitate to reach out to your TMO Relationship Manager with any questions or concerns about your school's SMART accounts.

Credit Balances on 18-19 Accounts

While we do spend a lot of time talking about tuition delinquency, we do have families who sometimes pay **more** than they are billed! Some of you have highlighted these cases at your schools already, and we have transferred those balances to the 19-20 account or issued refunds.

- TMO has just completed a review of ALL 18-19 SMART accounts and have worked with our dedicated SMART specialists to transfer all eligible credit balances to the corresponding 19-20 SMART account.
- Families with a credit balance who are not returning to your school are eligible for a refund. Kenny Marrero will reach out to all impacted to schools to process these refunds.

- Please do not hesitate to reach out to Kenny (kmarrero@archny.org) or 646-794-3413 if you have any questions about credit balances at your school.

Late Fees on SMART Accounts

Families who fail to pay their tuition on time, and/or have a past due balance on their account of greater than $99.00, are assessed a $40 late fee on their SMART account. Families often request that late fees be removed from their account; this can only be done on an exception basis, within the limitations referenced here:

- **School Late Fee Waivers** – each academic year, every school is provided an allotment of late fee waivers equaling approximately 10% of their registered families (e.g., 200 families = 20 waivers). This allotment is contractual and the school can use them without financial penalty. Please contact your TMO Relationship Manager if you wish to utilize a late fee waiver(s).
- **One Time Courtesy (OTC) Waivers** – Every family is entitled to a **ONE** OTC waiver per academic year. They can call SMART to request that waiver, or you can contact your TMO Relationship Manager to request this on the family's behalf.

In exceptional circumstances, late fees can be "turned off". Turning off late fees or "follow-up" for a family means that SMART will not impose a late fee on the family, nor will they engage in any correspondence/communication with the family about their past due balances. Utilizing this function should be used for extraordinary circumstances (i.e., family crisis), and should only be done for 2-3 months at a time.

- Please keep in mind that schools are responsible for follow-up on any account for which follow up processing is turned off.

When Do UPK Students Need SMART Accounts?

As you all know, UPK students do not register through TADs enrollment, nor are SMART accounts automatically set up for these students. However, sometimes UPK students do need a SMART account set up. This is generally for one of two reasons:

- The school district's UPK Program is only a part-time program (generally in the Upper Counties and Westchester), and the school offers a paid "Wrap" program to extend the school day.
- UPK students enroll in the school's paid Before/After Care Program.

In both cases, you can work with your TMO Relationship Manager directly to create these accounts. We will ask you to identify the student's grade as **UPK3** or **UPK4**, and provide all necessary parent contact information in an excel spreadsheet.

- Tuition associated with paid wrap programs will be identified on the invoice as a **UPK3 Wrap Fee** or **UPK4 Wrap Fee**.
- Charges associated with Before/After school programs will be identified on the invoice as **Before/After School Fee**.
- It is possible for one student to participate in both a paid wrap program and the before/after school program at their school.
- UPK students who have other siblings in the school with a SMART account will simply be added to the existing family account.

PK Tuition

The default tuition applied to SMART accounts for **paying** PK3 and PK4 programs is the 5 Full Day Rate, unless the school provides TMO with confirmed part-time program student names prior to account activations. Many of you did so back in the Spring when we reviewed enrollment lists in TADs. Several schools have since provided us with updates as you reviewed your 19-20 SMART pending family rosters. These changes are made as requests come in.

Since families often change their minds about PK options, we expect further changes as September approaches. Please review your PK class lists periodically for any changes and alert TMO asap if a child switches from full-time to part-time or vice-versa. Family frustration is reduced when tuition statements are accurate, and schools have a more accurate revenue projection for PK programs when billing is up to date. We appreciate your assistance!

Employee Student Discount – Increase Applied!

We were all excited to get the news that the new CBA was ratified by the FCT teachers. One of the highlights of the of the new contract is that the Employee Student Discount has been increased from $1,500 to $1,600 effective

September 2018.

- The 18-19 SMART tuition accounts for students at GRSS regional schools who received the $1,500 employee student discount in 18-19 have already been updated to reflect this change. A $100 credit was added to each eligible student account for the month of June. SMART sent an e-mail to the impacted parents explaining this change to their billing.
    - In cases where the family had already paid their entire 18-19 balance, and are not returning to the school (e.g., student graduated), TMO will work with the schools to process a refund. For those who are returning to school in September, the credit balance will roll forward to the 19-20 account shortly after the account is activated.
- All eligible employees (of whom we are aware) will see the $1,600 discount on their 19-20 SMART account upon activation. Please send requests for new employee student discounts to your TMO Relationship Manager.
- Full-time bargaining teachers who have a child(ren) in a paying PK program are eligible for the discount.
    - If the child attends 5 Full or 5 Half Days, the entire $1600 discount will be applied
    - If the child attends 3 Full or 3 Half Days, a prorated discount of $960 will be applied (60% of $1600)
    - The contract calculates the pro-ration based on days in the building, not tuition paid. This is comparable to how part-time teacher compensation is calculated.
- Teachers at closing schools are eligible to receive the discount for one year following the closure even if not rehired at another Catholic school for that year.
- Ineligible employees who receive a "grandfathered" partial employee discount will not receive an increase.

Children's Scholarship Fund (CSF)

If a family has an 18-19 past due balance in excess of $1,000, TMO cannot process the student verification form required by Children's Scholarship Fund. Without the completed verification, CSF will not award the family/student.

All principals have received the list of students at your school who are at risk of losing their 19-20 CSF award due to past due balances. **Thank you** for all your efforts this week to reach out to families to communicate this important message.

If a student had a CSF award at a previous school and is now enrolling at your school, the scholarship can be transferred. Please reach out to your TMO Relationship Manager for assistance in completing all the necessary steps to facilitate the transfer.

Third Party Scholarships

Kremer Tuition Grants - please provide the TMO with the following:

- Foundation e-mail confirmation
- Approved student list
- Specific award amounts to be accurately applied to the SMART account

Columbus Citizen Foundation

- TMO has reached out to the Foundation for the list of recipients; we expect to receive the final list in late summer
- Checks are sent from the Foundation to schools in September

Local Scholarships

Schools are asked to send local scholarship information to TMO for inclusion in billing as soon as possible. This includes regional, school and parish scholarships and benefactor awards where available.

We ask you to keep the following in mind when considering who to award with any discretionary funds you might have access to:

- Check to see if the family already receives financial aid from GRSS, Be a Student's Friend, or Children's Scholarship Fund.
    - If they do, consider giving the award to a family who does **not**. Families who are not eligible to apply for financial aid, or make just over the income threshold, can often benefit most from the assistance.
    - The award cannot exceed 75% of the total tuition and fees obligation, and should be considerably less.
- If an award is given to a family who already receives aid, the total amount of assistance received by the family cannot exceed 75% of the total tuition and fees obligation either.

- Awards should not be given to families who are delinquent and have been unresponsive to your efforts to collect tuition in previous years.
- Please consider currently enrolled families first when allocating these awards; new families are all entitled to apply for financial aid.
- Enrollment and TMO will push back on any request which pushes a family over the 75% threshold, as well as awards made to families with a history of delinquency and unresponsiveness.

Please do not hesitate to reach out if you have any questions or concerns regarding local scholarships. The Tuition Management Office is happy to provide any information you may need from family billing accounts as you consider local awards.

Credit Card Usage Fee

As you are aware, parents are able to make tuition payments via SMART by several methods, including credit/debit cards. The usage of credit/debit cards incurs a fee which must be paid to the credit card processor (i.e., Visa, Mastercard, AMEX, etc.). Currently, a 2% fee is absorbed by GRSS schools. For the 18-19 school year alone, these fees will account for over $1 million in lost revenue to our schools. New York State law prevented us from passing this cost along to the credit/debit card user in the past. Recent court rulings have now made it possible to pass along this cost to the credit/debit card user.

Beginning on the day the first invoice for the 19-20 school year is sent for each school, settings will be updated in SMART to pass along a "credit card usage" fee to credit/debit card users (2% of the total amount charged). The amount of the fee will be clearly communicated before payment is submitted, and users will have the opportunity choose an alternative payment method to avoid the fee.

Please don't hesitate to give me a call if you have any questions.

Approved Fees and Discounts

And speaking of fees…as you work with your TMO Relationship Manager to add fees and scholarships to student tuition accounts, please keep in mind that there is a pre-set list of fee and discount categories (which have been carefully mapped to the correct general ledger accounts) which can be used. If you need assistance determining which fee or discount category should be used for a specific charge or scholarship, please reach out to us for assistance. Listed below is the complete list for 19-20.

2019-2020 Fee Categories	2019-2020 Discount Categories	Grades
Activity Fee PK	Alumni Scholarship	UPK3
Additional Fundraising Fee	Archdiocese Family Grant	UPK4
After School Late Fee	Benefactor Award	PK3
Allocated Tuition Due	Be a Students Friend	PK4
Before/After School Fee	Cardinal Egan Italian American Award	K
Before/After School Program Fee	Childrens Scholarship Fund Award	1-8
Before/After School Registration Fee	Columbus Citizens Award	Withdrew
Book/Classroom Supply Fee	Early Withdrawal Offset	WDWB
Book/Classroom Supply Fee PK	Emergency Tuition Assistance	
Endowment Fee	Employee Student Discount	
Family Participation Fee	Financial Assistance/Scholarship	
Field Trip Fee	Kremer Foundation Award	
Fundraising Fee	Late Enrollment Offset	
Fundraising Fee PK	Legacy Grant	
General Fee	Other Discount	
Graduation Fee	Other Scholarship	
Graduation Fee PK	Parish Scholarship	
Incidentals Fee	Payment Plan Offset	

Meal/Snack Fee	Referral Discount
Other Fees	Regional Scholarship
Parent/Home School Association Fee	Registration Fee Credit
Payment Plan Billing	School Scholarship
Prep Course / Test Fee	Sent to Collections
Registration Fee	Transfer Grant
Sacramental	Tuition Allocated to Other(s) - Offset
Sent to Collections	Tuition Reallocation
Smart Admin Fee (Display)	
Special Subject Fee	
Technology Fee	
Technology Fee PK	
Tuition Reallocation	
Wrap Around 3 Fee	
Wrap Around 4 Fee	

TUITION MANAGEMENT TEAM:

TMO	Ext.	Title	Email
Mary Stenson	3410	Director	Mary.Stenson@archny.org
Dana Sellers	2711	Associate Director of Tuition Billing	Dana.Sellers@archny.org
Kenny Marrero	3413	Assistant Director of Communications, Reporting and Data Quality	Kenny.Marrero@archny.org
Lionel Thomas	3414	Tuition Collection Specialist	Lionel.Thomas@archny.org
Jasmine Dhaliwal	2840	Relationship Manager: Manhattan, N & E Bronx	Jasmine.dhaliwal@archny.org
Patrick McCullough	3113	Relationship Manager: Staten Island, S & N/W Bronx	Patrick.mccullough@archny.org
Kelly O'Conner	2738	Relationship Manager: Central Westchester, Dutchess, N W/P, Rockland, USO	Kelly.O'Connor@archny.org

As a reminder, we ask that you do not publish our contact information or direct parents to our office. Please direct parent inquiries to the GRSS parent hotline:

- ***Hotline: 646-794-3318.*** (Translation services are available.)

Contact information for your Smart Tuition dedicated specialist (for school use only):

Region	Specialist Name	Email Address	Phone Number
South/Northwest Bronx	**Annie Sayyed**	**Annie.Sayyed@blackbaud.com**	**856-446-7327**
Staten Island	**Heather Niven**	**Heather.Niven@blackbaud.com**	**856-446-7358**
Manhattan Northern Westchester/Putnam Rockland Ulster/Sullivan/Orange	**Kelly Vallejo**	**Kelly.Vallejo@blackbaud.com**	**856-446-7377**

Central Westchester East/Northeast Bronx Dutchess	**Kyle Nitti**	**Kyle.Nitti@blackbaud.com**	**856-446-7425**