Start Using Fee Management
In 3 Easy Steps

So, your district wants to make finance work easier by using RevTrak's Fee Management with your SIS...

That's great! It's simple to get started!

In fact, you've already taken the first step by scheduling your upcoming Fee Management implementation appointment. Here's what to expect and what you'll need to bring to your implementation meeting.

Then you'll be cruising!

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1) Prepare Student List for Import

This is a student criteria list we'll need to get started. This is the foundational list that will be used to assign all fees. Often this list can be pulled from you Student Information System, but verify with your technical team to confirm how you would like to pull this list of information.

Here's the format we need the info in:

Must be a CSV file (comma delimited). See sample template **here**.

• Please do not include a header row or remember to remove the header row before your implementation appointment.

• 9 columns in the following order:

  • Student last name

  • Student first name

  • Student ID - This must be a unique ID and can contain alphanumeric characters.

  • PIN - The PIN can be the same as Student ID. It is what parents will use when viewing their student in Fee Management in the Web Store and can contain alphanumeric characters.

  • Free and reduced status - This is either Free, Reduced, or left blank if they are neither.

  • Gender - Accepts up to 20 characters.

  • Grade - Accepts letters and numbers up to 20 characters.

  • Homeroom teacher - (if known)

  • Building - Accepts up to 250 characters.

• **The first 4 columns are required, the rest are optional.** The Free and Reduced Status listed in the 5th column is needed if you'd like to assign fees to students who receive a free or reduced rate. (If you include this status information, you can restrict who has access to the spreadsheet when the spreadsheet is being pulled to ensure appropriate student privacy permissions are maintained.)

	A	B	C	D	E	F	G	H	I	J	K	L
1	Adamson	Noah	8862	88621		Male	1	Smith	Bloomington Elementary			
2	Eaden	Olivia	1644	16441		Female	2	Casey	Bloomington Elementary			
3	Eggar	Oliver	6079	60791	Free	Male	3	Collins	Bloomington Elementary			
4	Karlin	Elijah	4139	41391		Male	4	Jackson	Northridge Elementary			
5	Neale	Lucas	1630	16301		Male	5	Doe	Pollard Elementary			
6	Neller	Daniel	9526	95261	REDUCED	Male	6	Smith	Vanco Valley Elementary			
7	Richford	Amelia	3180	31801	FREE	Female	7	Casey	Vanco Valley Middle School			
8	Tapp	Sophia	3904	39041	REDUCED	Female	8	Collins	Vanco Valley Middle School			
9	Walston	Simon	1317	13171		Male	9	Jackson	American High School			
10												

2) Have a conversation about your district needs

When you meet with your implementation specialist, discuss if your district would be a good fit for an Eligibility List option. You could benefit by using the Eligibility List option if your district doesn't need to assign fees by the criteria identified in the student import list. An Eligibility List is an additional way your district could assign fees, and your implementation specialist can help walk you through that process.

3) Learn how to assign fees in 10 minutes!

Now you can begin building fees based on student criteria or an eligibility list! This first training takes 10 minutes to learn how to build a fee. Afterward, you'll be set to build fees on your own and it will take you less than 2 minutes per fee!

Afterward, you'll get a recording of this meeting to refer back to from your session.

And if you forget how to assign fees or need a refresher, **check out this video for help,** or **contact** your implementation specialist or our client support team.

Need help with something else?

Contact your implementation specialist or our client support team.

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