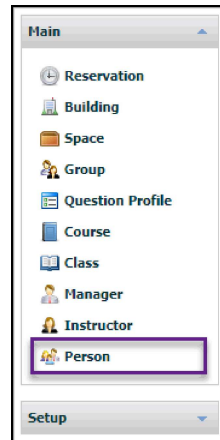




Cancel a Student out of a Class

1. Navigate to Person by selecting **Person** in Main Menu in the page's upper left corner, and then search by **Name** or by **Email**.



A screenshot of a search results table for 'Person'. The table has columns for ID, Name, and Age. A search input field is at the top with 'lopel' entered. The results are:

ID	Name	Age
	<input type="text" value="lopel"/>	
3690931	Lopez, Ariel	0
3690926	Lopez, Tianna	11
3690932	Lopez, Tianna	11

- **NOTE:** If the registration was initially paid using an ePayment, navigate to **Payments** on **Payment** tab for this registration. Double-click on the actual payment and write down the **Reference** number. This number will then be entered into the **Note** field for internal reference.

2. Double click into the Person's Name, then double click into the **Registration**.

[3690932] Person

Pre, First, Last, Suffix: Tianna Lopez
Email: alopez@fauxemail.com
Address: 123 Maple Avenue
City, State, Zip: Bloomington MN 55496
Birthdate, Age, Grade: 01/04/2009 11 6th Male Female
 Suspend Account Suspend Parent Portal RT Cust ID: 0

Registrations For: Lopez, Tianna

Date	Title	Location	Status	Ref.	Balance
9/15/2020	FA21-1 - Advanced Youth		Enrolled	10074002	\$0.00

Buttons: Reports, Cancel, Save

3. In the upper right corner of the Registration window: A) change **Enrolled** to **Cancelled**. B) Select **OK** when asked, "Are you sure you want to cancel this registration?"

[14083422] Registration

Name: Lopez, Tianna (A) Status: Cancelled
Class: FA21-1 Advanced Youth Orchestra
Pricing: Standard
 Additional Student

Payment: Invoice History Questions Contract History Attendance Notes & Emails

Registered: 09 Deleted
Price: \$80.00
Adjust: Amount: \$80.00
Total: Deleted
Paid: Deleted
Balance: Deleted

Update Account On File
Card Type, Last 4 Digits: Visa 1111
Expiration Date: 04/24
Delete Card On File

Confirm dialog: Are you sure you want to cancel this registration? (B)
Buttons: Ok, Cancel

Buttons: Reports, Cancel, Save

4. Then complete details for the cancellation.

[NEW] Registration Cancellation

Cancellation Fee: \$0.00
Credit Type: ePayment
Credit Date: 09/15/2020
Reference:
Amount: \$80.00 Process Refund Now
 Leave Balance Due on Registration
Note: Initial Ref #123456
Buttons: Cancel, Save

- **Cancellation Fee** represents that portion of the payment that the organization retains for costs associated with processing the cancellation, where applicable and if desired.
 - **For Contract Classes:** The school keeps payments for services rendered. This (positive) dollar amount is entered into the Cancellation Fee field at the time of Cancellation.
- Choose the type of refund to be issued in the **Credit Type** drop-down menu.
 - Check or Money Order: When the refund is issued as a check or money order, enter the check/money order number into the **Reference** field. Otherwise, leave this field blank.
 - ePayment: When refunding an ePayment, select the **Process Refund Now**. Select **OK** when asked, “You will be refunding to this customer’s account. Are you sure you want to refund \$xx.xx back to the customer’s account?” A confirmation message will be received once the refund has been processed, and the refund’s **RevTrak Order ID** will automatically populate the **Reference** field.
 - Other: When not issuing a refund and retaining the full fee paid, select “**Other**” in the Credit Type drop-down, as it is a required field.
- The **Amount** of the refund during registration is a positive number (e.g. \$40 for a \$40 refund).
 1. **For Standard Priced Classes:** Click on the Calculator button to calculate the correct refund amount, based on original payment amount less Cancellation Fee.
 2. **For Contract Classes:** Outside of refunds for pro-rated attendance and fees, no money is refunded during cancellation, and the Amount is \$0. Any amount refunded at cancellation will not be included in families’ year-end tax statements.
- If money is owed with a balance due on the registration, check the box for **Leave Balance Due on Registration**. Otherwise, leave the box unchecked.
- Internal notes may be entered in the **Note** field for future reference. Make note of the **Reference** number of initial ePayment for reporting purposes.
 - Click **Save**.
 1. **For Standard Priced Classes:** the account will now show a balance of **\$0**.
 2. **For Contract Classes:** On the Adjustments Tab, enter an adjustment to balance the account.
- **Save** out of both the registration and the class.