**Blackbaud Education Management**

Tuition Management Workbook

One of the key components to a successful implementation is communication. This workbook is one of the most important tools your Blackbaud consultant uses to understand your school’s unique setup and needs, and how you plan to use the software. Knowing that schools often change their setup and process to better serve their community, please note that these will be used to configure your software. While you are not locked into the answers you give here, should the school choose to change these options after the consultant has configured the system based on your answers here, the school may incur additional costs and delays. Please make sure that you continually are communicating with your consultant about changes that are coming or are being discussed to avoid potential issues.

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| --- | --- |
| **School Name:** |  |
| **Completed By:** |  |
| **Job Title:** |  |
| **Blackbaud Consultant:** |  |

# SYSTEM CONFIGURATION

**Grade Levels**

Please provide all school grade levels. **Note**: If you are using Blackbaud Enrollment Management System, Blackbaud Learning Management System or Blackbaud Student Information System, please list your grades as they appear in your Core system setup**.**

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**School Users**

Please provide a list of users that should have access to Blackbaud Tuition Management. For each user, please list their full name, email address, role at school, and what level of access they should have. Please refer to [this link](https://kb.blackbaud.com/knowledgebase/articles/Article/114475) for list of roles and descriptions. **Note**: One school user must be listed as school finance user.

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| --- | --- | --- | --- |
| **Full Name** | **Email Address** | **Title** | **Access Level** |
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# PAYMENT OPTIONS

* **Payment Plans**: Please list the payment plans that you would like to offer to your families (ex: Annual, Semi-Annual, 10-month) Be sure to include the months that are part of the payment plan (example: 10-month payment plan beginning in June and ending in March).
* **Due Dates:** Which due dates would you like to offer for each payment plan (ex: for the 10-month payment plan, families can choose between the 5th & the 15th of the month)? **Note:** A family can only have one due date on their payment plan. This will serve as their due date for all items billed per month.
* **Payment Method Options**: Blackbaud Tuition Management has three payment methods families can choose from. **Note:** A [platform fee](https://kb.blackbaud.com/knowledgebase/articles/Article/204387) will be assessed for each payment using the BBTM platform.
	1. **Invoice Only**: families will need to initiate a payment each time an invoice is due. They can make a payment via online, phone, mail-in etc.
	2. **Automatic Only:** families must enroll in automatic withdrawals via ACH (Checking or Savings) or Credit Card for each month a balance is due.
	3. **Full Choice:** Invoice & Automatic.

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| **Payment Plan Name** | **Plan Months** | **Due Date** | **Payment Method** |
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# SYSTEM FEES

**Platform Fees**

A [platform fee](https://kb.blackbaud.com/knowledgebase/articles/Article/204387) will be assessed each time a Family makes a payment using the BBTM platform. The platform fee covers costs incurred by BBTM for maintaining the BBTM platform, the security and compliance costs associated with handling payments, and providing the Services.

1. For **credit or debit card** payments, the platform fee is 3.12% of the payment amount.
2. For **ACH bank transfer** payments, the platform fee is 1% of the payment amount, plus $0.30, but not to exceed $2.50. This $2.50 cap is on any transaction of $220 or more.

Please mark how you would like to handle the platform fees for each of the payment options below.

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| --- | --- |
| **Platform Fee** | **Please Choose One Option** |
| ACH Platform Fee | [ ]  Pass to payer [ ]  Absorb  |
| Credit Card Platform Fee | [ ]  Pass to payer [ ]  Absorb  |

**Administrative Fee**

The once-per-year Administrative Fee is required for setting up payor accounts for the school and payment plans in Blackbaud Tuition Management.

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| --- | --- |
| **Payment Plan Name** | **Please Choose One Option** |
|  | [ ]  Pass to Payer [ ]  Absorb |
|  | [ ]  Pass to Payer [ ]  Absorb |
|  | [ ]  Pass to Payer [ ]  Absorb |
|  | [ ]  Pass to Payer [ ]  Absorb |
|  | [ ]  Pass to Payer [ ]  Absorb |

**Follow Up Service**

Blackbaud Tuition Management charges a Follow Up Service fee of $40.00 per month once your grace period has ended and includes speedy, direct communication with your late payors. We email and text your late payors one day after the due date requesting payment by credit card or electronic bank transfer so that your school is paid in a timely fashion.

If you allow for “Full Choice” of payment options, the max grace period that can be programmed is 10 days. If you required families to enroll in “ACH/Credit Card”, the max grace period that can be programmed is 20 days.

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| **Grace Period** |
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In addition to the follow ups service fee, you can charge a School Late Fee on payments received after the due date. Choose a flat fee or percentage-based amount to be billed by Blackbaud Tuition Management. The School Late Fee revenue is remitted to your school.

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| **School Late Fee** |
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**TUITION, DEPOSITS AND ENROLLMENT FEES**

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| --- | --- | --- | --- |
| **Grade Level** | **Tuition** | **Deposit Amount(credited towards tuition)** | **Enrollment Fee(in addition to tuition)** |
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**GL Accounts**

Do your billing items go to the same income account or different income accounts?

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| --- | --- | --- |
| **Billing Item** | **Same or Different** | **If different, please explain** **(EX: Lower & Middle School go to separate GL accounts)** |
| Tuition  | [ ]  Same [x]  Different |  |
| Fees | [ ]  Same [ ]  Different |  |
| Discount | [ ]  Same [ ]  Different |  |

**Bookkeeping**

How does your school recognize revenue?

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| --- | --- |
| **Bookkeeping** | **Please Choose One Option** |
| Revenue Recognition | [ ]  Accrual [ ]  As Billed [ ]  Cash Basis |

**CONTRACT INTEGRATION (IF APPLICABLE)**

If your school uses **Blackbaud’s Enrollment Management System (EMS),** please complete the questions below. If not, please disregard the sections below.

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| **The Basics** |
| Is this your first year using integrated contracts? | [ ]  Yes [ ]  No |
| When do you plan on sending out contracts for the upcoming school year? |  |
| Will you allow divorced or separated parents to have separate Tuition Management Accounts? | [ ]  Yes [ ]  No |
| Does your school offer Tuition Insurance?  | [ ]  Yes [ ]  No |

If you offer Tuition Insurance, please list which payment plans it is required and/or optional for:

|  |  |
| --- | --- |
| **Payment Plan Name** | **Tuition Insurance** |
|  | [ ]  Optional [ ]  Required [ ]  Not Offered |
|  | [ ]  Optional [ ]  Required [ ]  Not Offered |
|  | [ ]  Optional [ ]  Required [ ]  Not Offered |
|  | [ ]  Optional [ ]  Required [ ]  Not Offered |
|  | [ ]  Optional [ ]  Required [ ]  Not Offered |

**Setup Tasks for Contract Integration with Enrollment Management**

* Make sure at least one contract is fully set up in Enrollment Management.
	+ This includes all contractual text, fee schedule, deposit setup, and settings.
* Make sure you have at least one test student in the system with responsible signers listed on contact card.