

Guide for Business Offices during COVID-19

Updated Jul 20, 2021

As of July 12, 2021, this "Learn Veracross" site has been deprecated. It will remain live at least through October 1, 2021, but will no longer be updated. All knowledge content has moved to the new [Veracross Community](#). Please update your bookmarks.

[Here is the new version of this article in the Veracross Community.](#)

Overview

Circumstances may arise where your parents may ask for changes to their invoice and payment schedule. It is important to have a plan for what your Business Office will offer and how to process each case. Veracross Student Billing has a number of workflows that can help you manage these changes and updates.

Payment Plan Changes

Steps:

1. If there has been payments that have been applied to the Invoice in question and those payments have been applied to AR Invoice Items that you wish to change, you will need to [cancel that Cash Receipt Header](#).

2. Once there are no payments applied to AR Invoice Items, you are able to **cancel those AR Invoice Items**.
3. Now you are able to start from scratch, the next step is to **update the Payment Frequency** on the relevant records:
 - Has the Payment Frequency on the following records been updated to the new Payment Plan?
 - Invoice Record
 - Student Record
 - Household Record
 - Please note: The Invoice Record Payment Frequency field becomes even more important if your school has and is utilizing AutoPay. AutoPay Batches pull AR Invoice Items based on School Year, Invoice Type, and **Payment Frequency/Plan**. It is important the Invoice Record Payment Frequency field is updated so the invoice will be included (or not included) in the correct AutoPay Batch.
4. **Create Person Charge Items** for the new charges that are replacing the ones that were canceled
5. **Split these charges** whichever way you are comfortable
6. **Mark these Charges Ready to Invoice** and **Move them onto the Invoice**
7. **Post the Invoice(s)**
8. **Recreate the Cash Receipt** that was canceled in the first step
 - If it was an **Invoice Payment**
 - If it was a **Deposit**
9. Once the Payment has been applied and posted on the Invoice in question, the update has been completed

Extend Payment Plan Installments

Parents may request an extension or an update to the number of installments on the Payment Plan that they originally chose.

If the unposted charge items have **not** been split, updating the fields Item Date, Installment Months and Number of Installments on the Charge Item Record will help manipulate the installments to the agreed upon payment schedule.

1. Item Date: update this to the first date of the first installment
2. Installment Months: the number of months between each installment created for this item
3. Number of Installments: the number of installments into which this item will be split

If charge items have been split but not posted to an invoice, our suggestion is to manually adjust each individual case from the Student Record.

1. Delete the incorrect charge items and add new charge items
2. Navigate to the Charge Item Record and update the Number of Installments and Installment Month

Updating Due Dates on Tuition Invoices

If Parents request that one or more Due Dates are changed on Tuition Invoices, the Due Date field on the AR Invoice Item field will need to be updated. Regardless if the AR Invoice Item is posted or not posted on the Invoice, this field is always updatable. This allows the Business Office staff to allow for changes for when the charges are due.

Updating the Due Date field can be done individually and in batch by pulling in the relevant AR Invoice Items on an AR Invoice Item query, and using the batch update function.

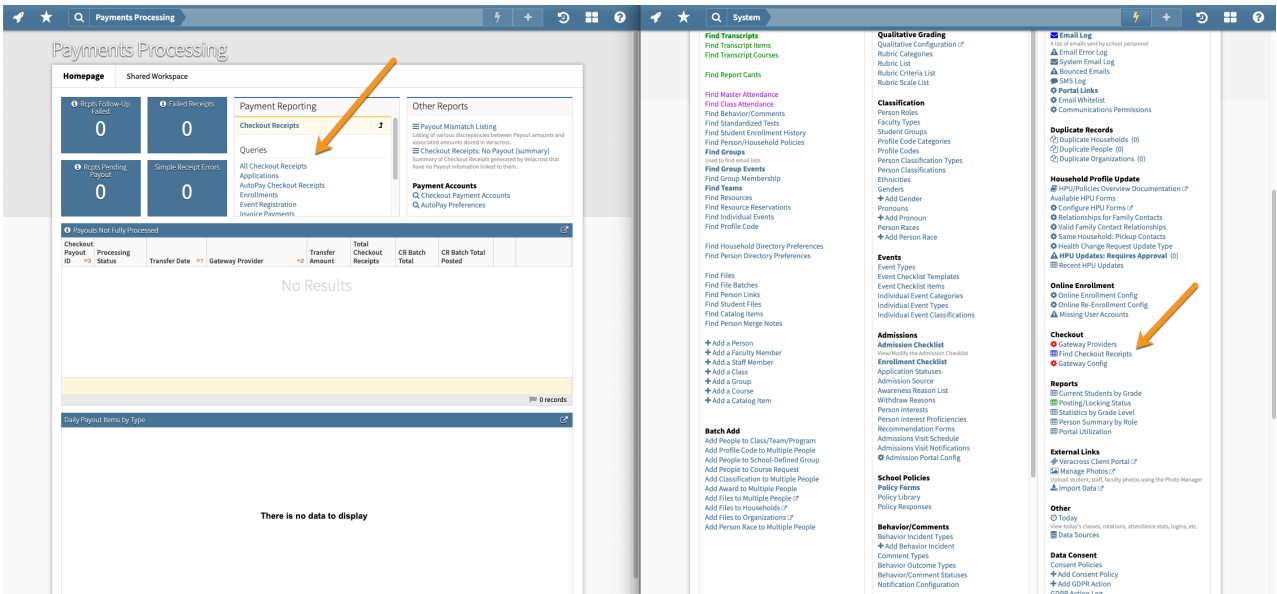
Updating AR Invoice Item Due Dates

AR Invoice Item Due Dates in relation to AutoPay Batches

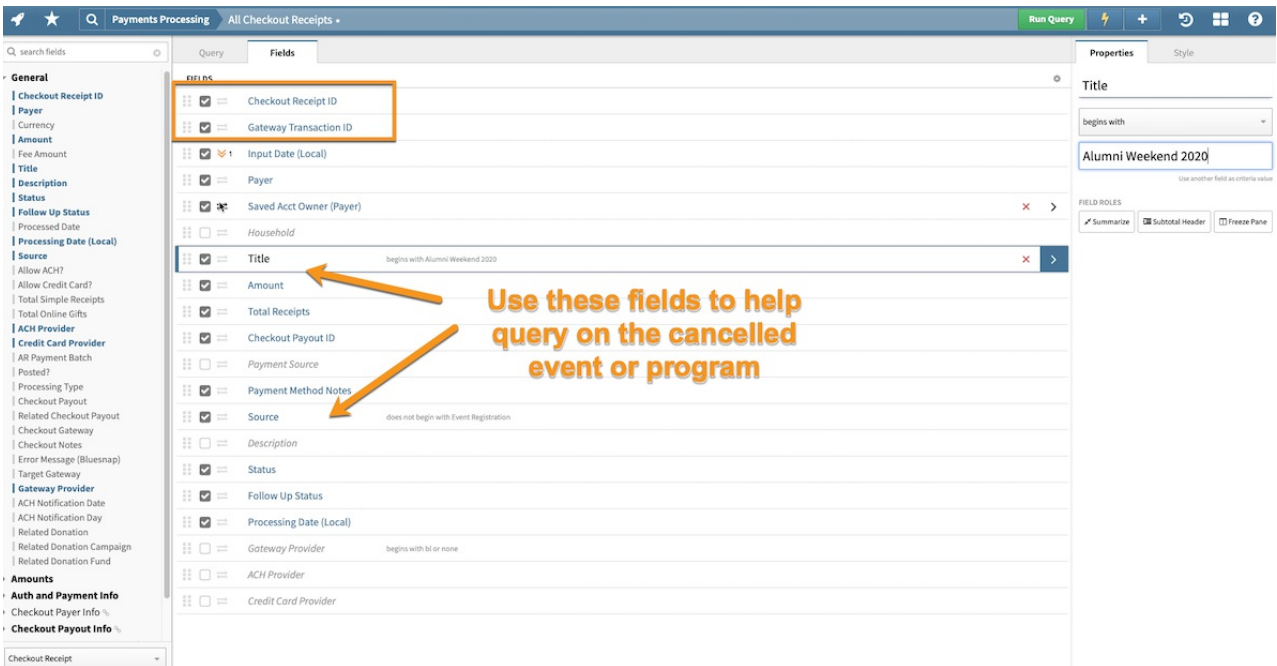
Refunds for Cancelled Events and Programs with VC Pay

If your school has experienced the cancellation of events and programs and need to refund your parents, please submit a request in our ticketing system. In this ticket, please include the URL link or a query with all the Checkout Receipts and their IDs.

Checkout Receipt queries live on the System Homepage in Axiom and on the Payments Processing Homepage in Veracross Accounting.



TIP: If everyone is getting refunded for an event or program registration, use the Title Field to create a query of all of the checkout receipts and save the query to send to Veracross via the ticketing system. The Title Field will be the name of the Event or Program Registration. An additionally useful field is the Source field, which will be either Event Registration or the Program Registration short name. This will be easier than copy/pasting the individual URLs or IDs. Here is an example of a query design that would help our staff process the refund:



Tracking Expenses with Veracross Accounting

If your school is looking for different ways to track expenses due to COVID-19, one option is to create a new GL Account to specifically track these expenses. If your school has Project Accounting, another option is to create a new Project-task in the system to help track transactions. Please see the how to videos below.

How to Create a New GL Account

Add a New Project-task with Project Accounting

