Custom Sponsored Billing Process

Anthology

Overview

- The Custom Sponsor Billing process provides schools with the ability to create a billing agent ledger card where the system automatically copies applied ledger charges for eligible students who are sponsored by Third-Party/Agencies.
- The processes utilize existing product functionality with the added customized process that copies charges to the billing agent ledger card.

Required and Optional Configuration

Confirmation of Eligibility
(Optional)

Approved Tuition Form

Letter of Credit Authorization

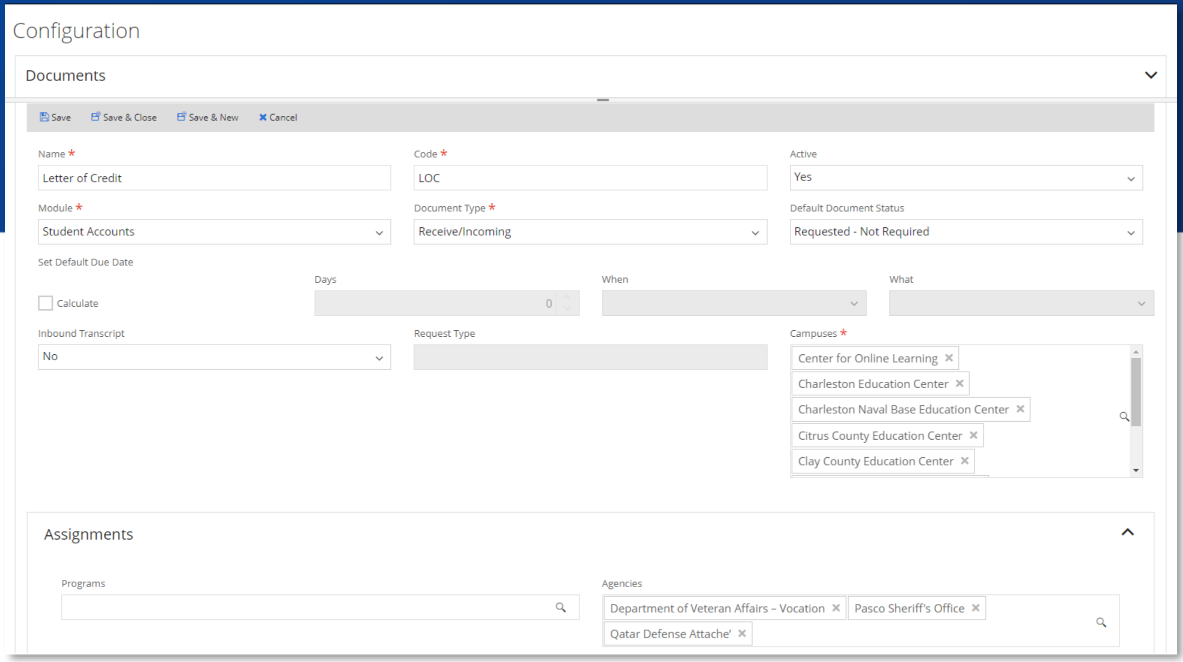
Approved Tuition Forms

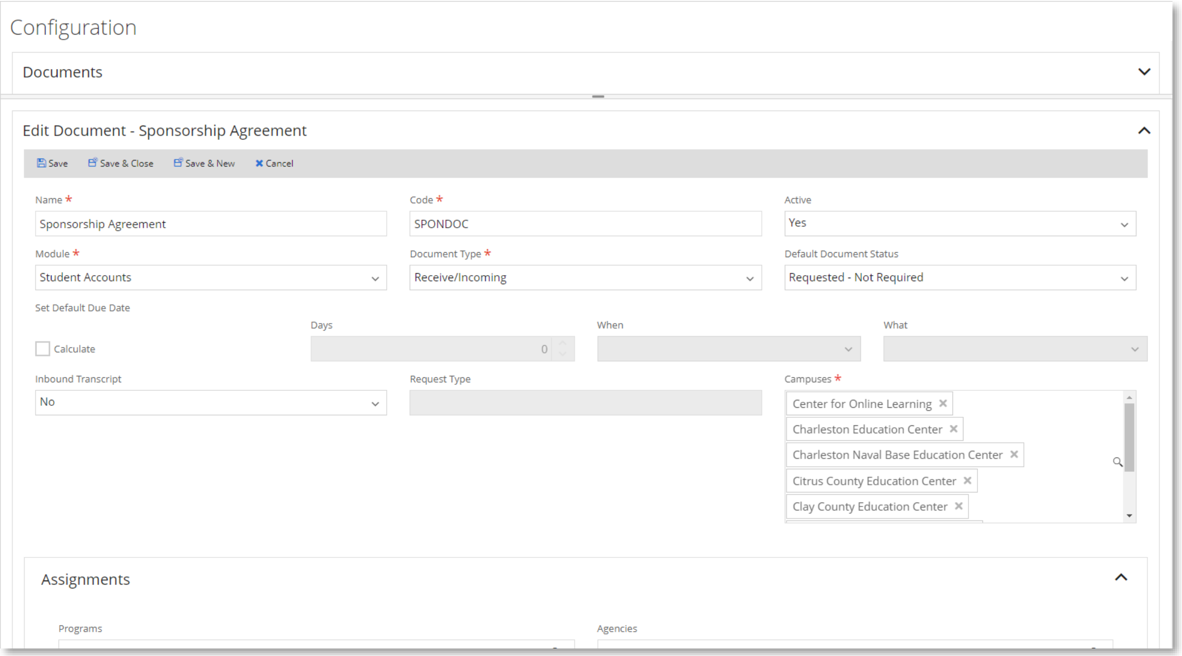
- Schools can choose to add a contract copy or approval authorization on file for the student. This can be a document type in Anthology Student.
- Anthology Student uses Documents to collect, track, and enable certain business processes using Documents.
- Documents can
  - Be automatically assigned based on program interest
  - Be uploaded from a student portal
  - Be requested by the institution for the student to submit by a due date
  - Have statuses to update workflows between departments
  - Trigger notifications to be sent via email, web alert, or task to other staff member
  - Be used as a rule when awarding certain fund sources

Documents

Staff can create separate documents, for example:

- Sponsorship Agreement
- Letter of Credit





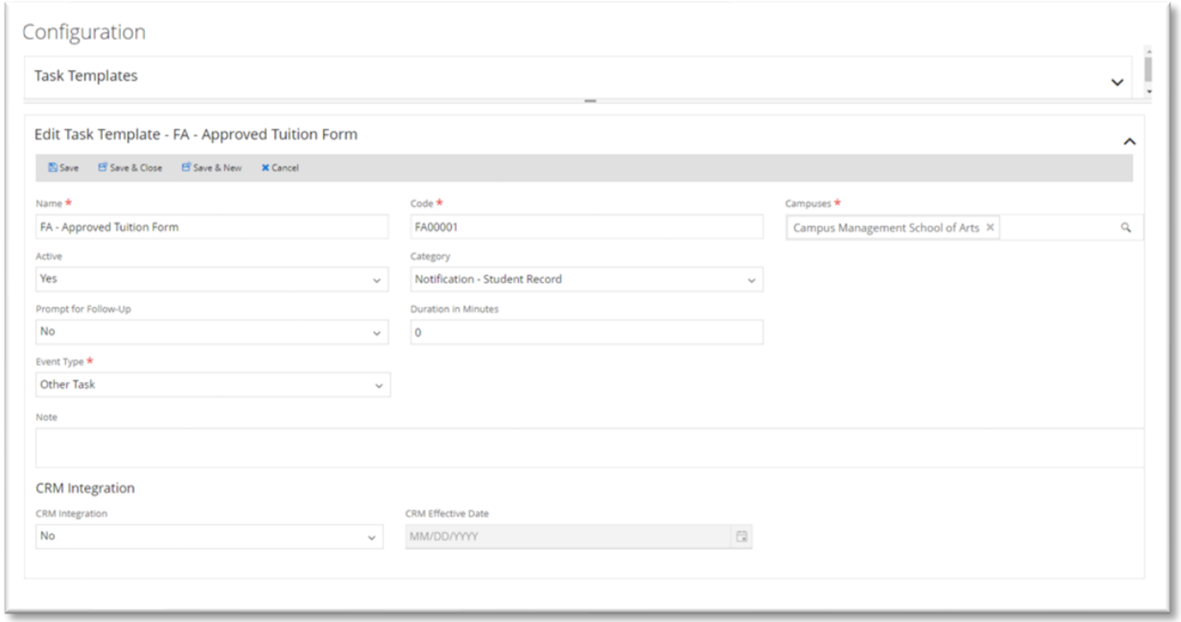
How does this document get added to the student record?

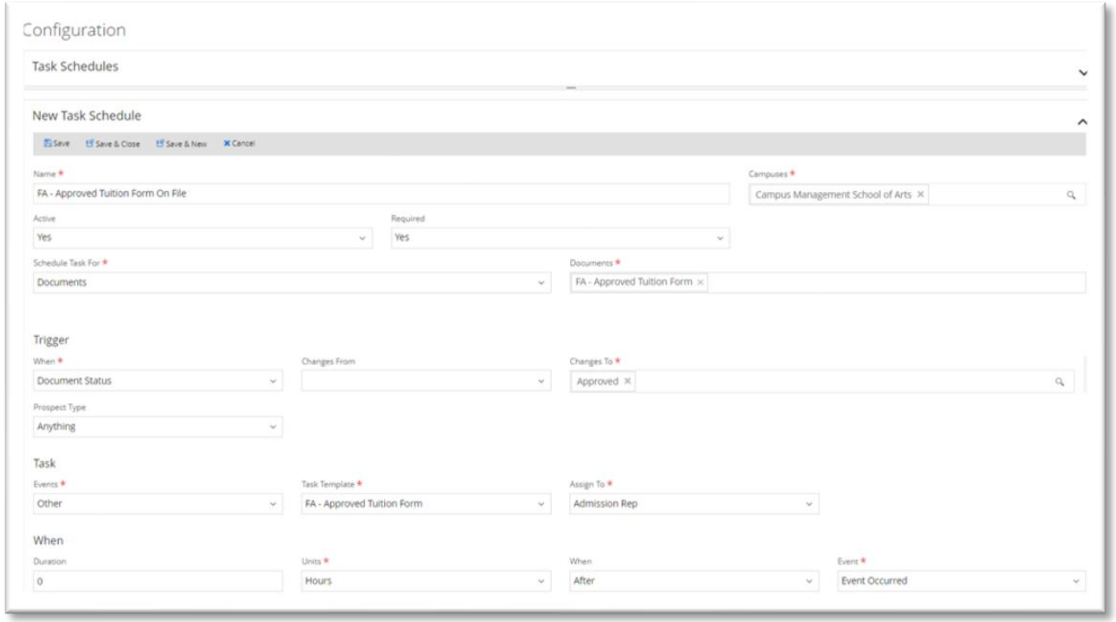
There are several ways the document could come from a student. Here are some potential options:

1. A downloadable PDF can be made available to the student on the portal to download, complete, and upload through the portal.
2. A Forms Builder form can collect the data and add it to the student record as a PDF.
3. An email request can be sent to the institution to request the form, and the student can email it back to be attached to their record.
4. All students could have this document automatically placed on their record in a certain status, and the student can upload the request at any time.
5. An email can come in and the document with no attached documentation can be placed on a student file as approved and act as the document needed; any notes could be added in the comments of the document.

Once the Document is received and approved

- A notification to the appropriate staff members will be sent to let them know that this student has an approved Tuition Form.





Sponsoring Agencies
(Required)

Setting up the Sponsor

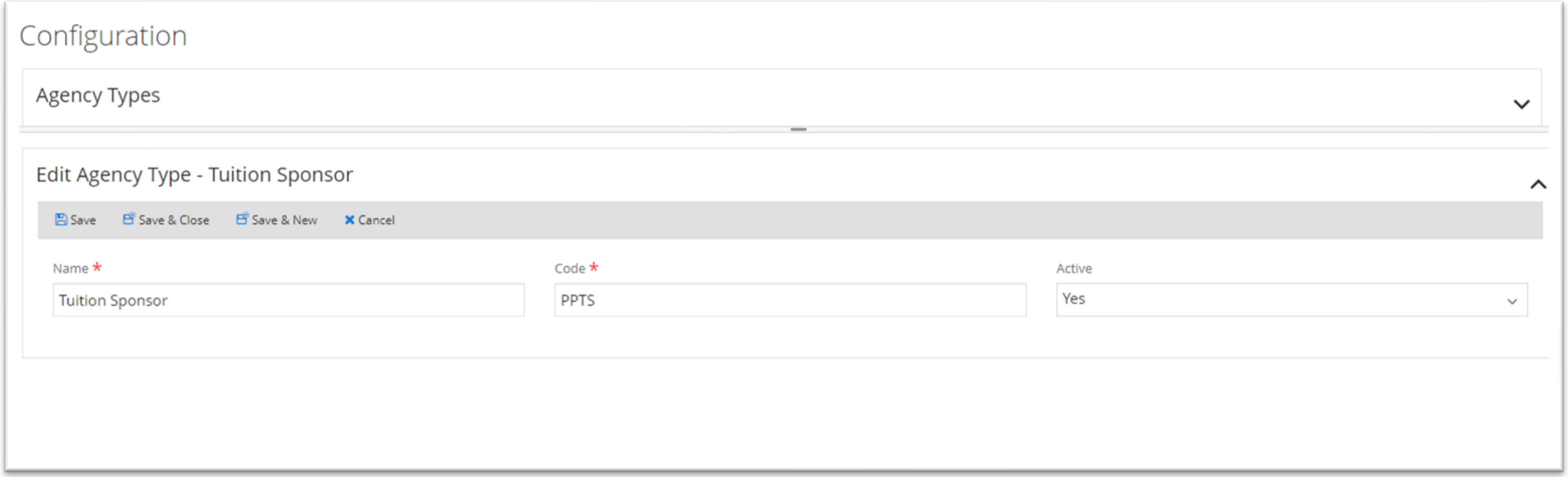
Creating the Sponsor

Getting the Sponsor Contact Information

Setting up the Sponsor Ledger Card

Sponsors are Agencies in Anthology Student

You can use the Agency Types page to add and manage the types of agencies that you can specify for the specific agency sponsors and third-party billing entities that provide assistance to students (such as commercial and non-profit).



Configuration > Contact Manager > Agencies

Existing Anthology Student functionality allows an institution to create relationships between a student and an outside organization/agency. Sometimes, these agencies may sponsor the student by paying all or part of their tuition. They may be part of a program that provides a discount. They could be other organizations like churches or non-profit organizations that the institution finds beneficial to associate with the student.

Specific fund sources can be created and associated with each agency.

About Agencies

Agency Types – A way to group different types of organizations that may be affiliated with students.

Agencies – The name of the organization and any documents you want to associate with them; you can also add the type and a specific fund source for that agency. You can have specific tests associated with agencies and agencies can have different locations that you work with called Branches.

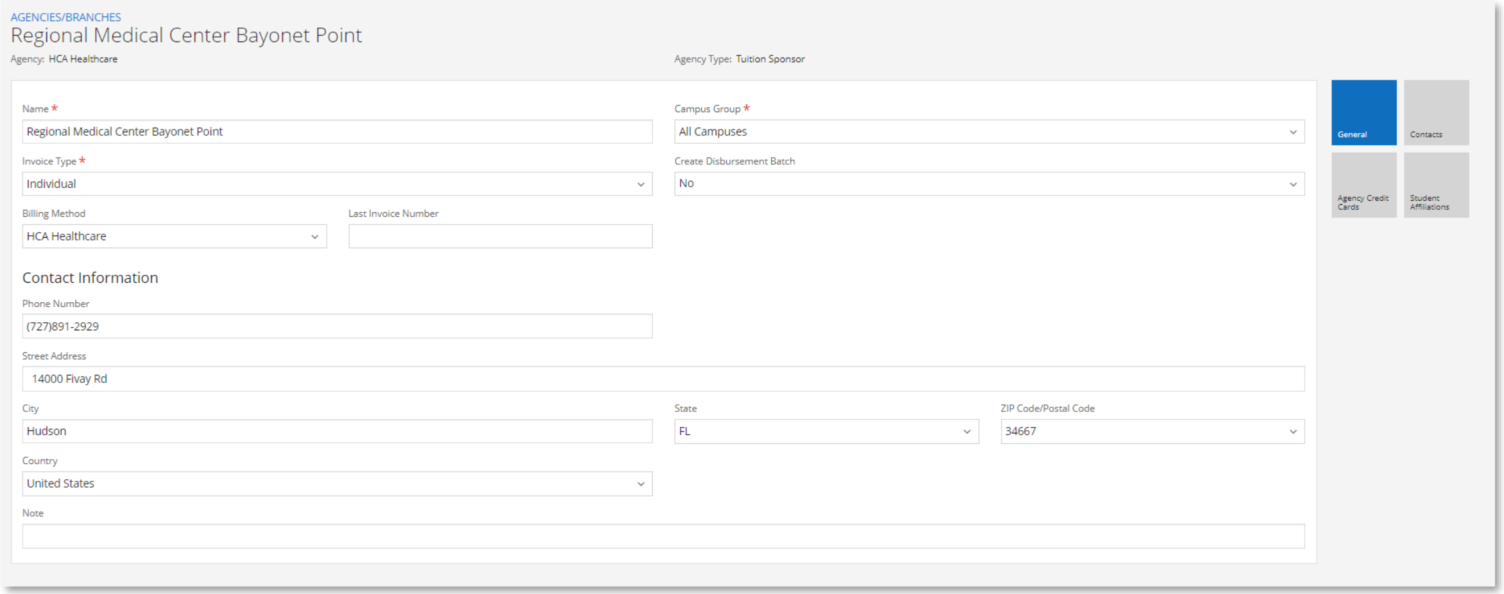
Branches – Locations of where the agency operates, if working with the Army, for example, you can set up the bases under Branches. Branches also have contacts. This is where you track the contact information for the person who will receive the invoices for the Branch. The Invoice type of Individual or Master is set here as well if Disbursement Batches are created for this Branch. Credit Cards can be placed on file for payments, although this practice is not widely used because of PII security concerns. Student affiliations are also seen in the branches.

Student Affiliations – The students who are associated with this agency. This is done on the student record.

Third-Party Invoices – Generates invoices for third parties or active agencies that are associated with your institution. These invoices will show the course schedule, student information, enrollment and term information, the grade (if submitted after the term), and balance options.

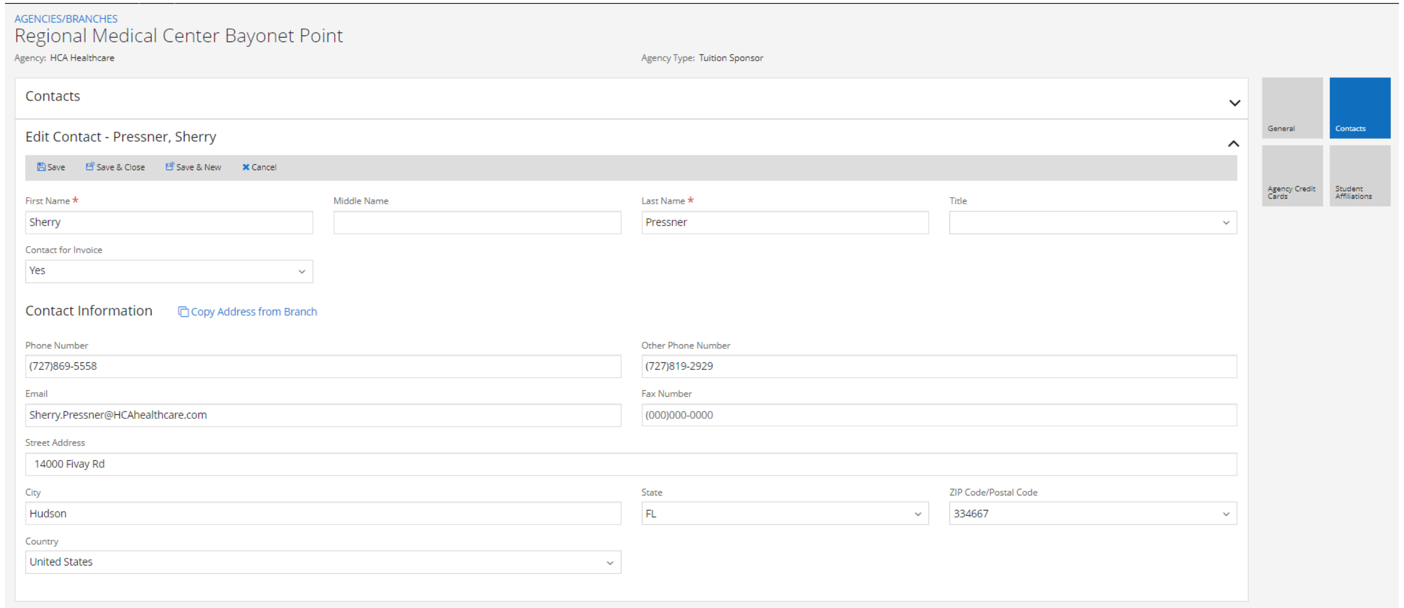
Creating the Sponsor

- The Sponsor will be configured under Agencies.
- This is where the Type and Fund Source and any required documents will be associated with the Sponsor.
- This is also where the Branch information is added which will house the Contact information and allow you to view invoices and student affiliations.



Creating the Sponsor Contact Information

- Example: For HCA Healthcare the large employer is the Reginal Medical Center at Bayonet Point.
- The head of HR there is Sherry Pressner. Her contact information is added here.



Setting up the Sponsor Ledger Card

The challenge we have had up to this point is providing a visible ledger card for the sponsor that will allow the institution to see the running charges for all students sponsored by term in a single location.

- See Credits, Charges, and Balances
- To be able to post payments
- To be able to send notifications outside of the Third-Party Invoice

The solution is to associate a ledger with the contact at the branch and enable this functionality; however, we must ensure that these ledgers are not mixed up with attending students. To accomplish this, we have created a Sponsored Tuition Ledger Prospect Type and a corresponding Prospect Template for Sponsored Billing Setup.

Create Prospect Type (Configuration > Admissions > Prospect Types)

Create a Prospect Template to be reused when Billing Agents are created

Configuration

Prospect Templates

Edit Prospect Template - Sponsored Billing Setup

Save | Save & Close | Save & New | Cancel

Name *
Sponsored Billing Setup

Code *
SPONSO

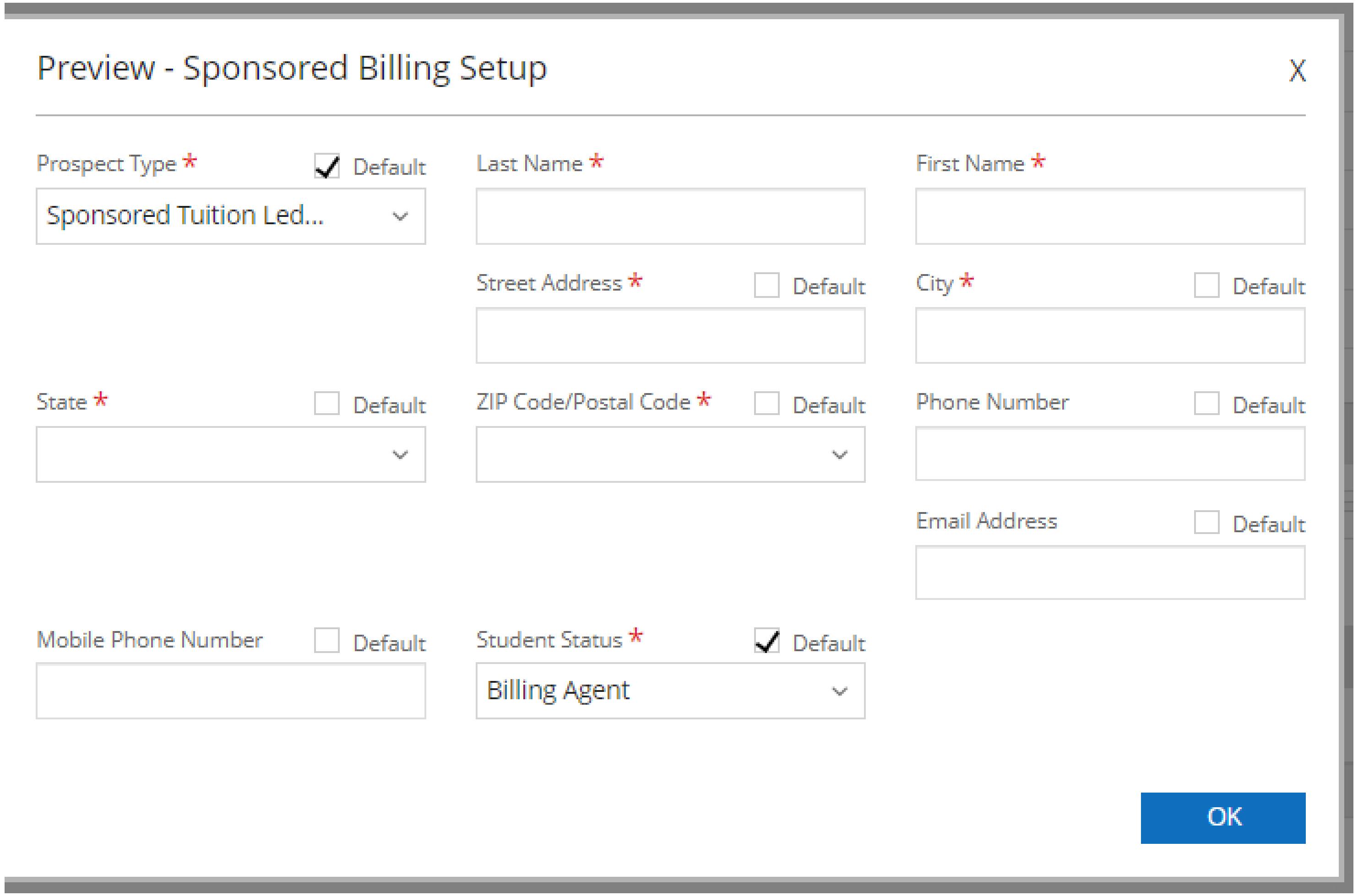
First and Last name are required fields. No template can be saved without these fields.

Fields(11)

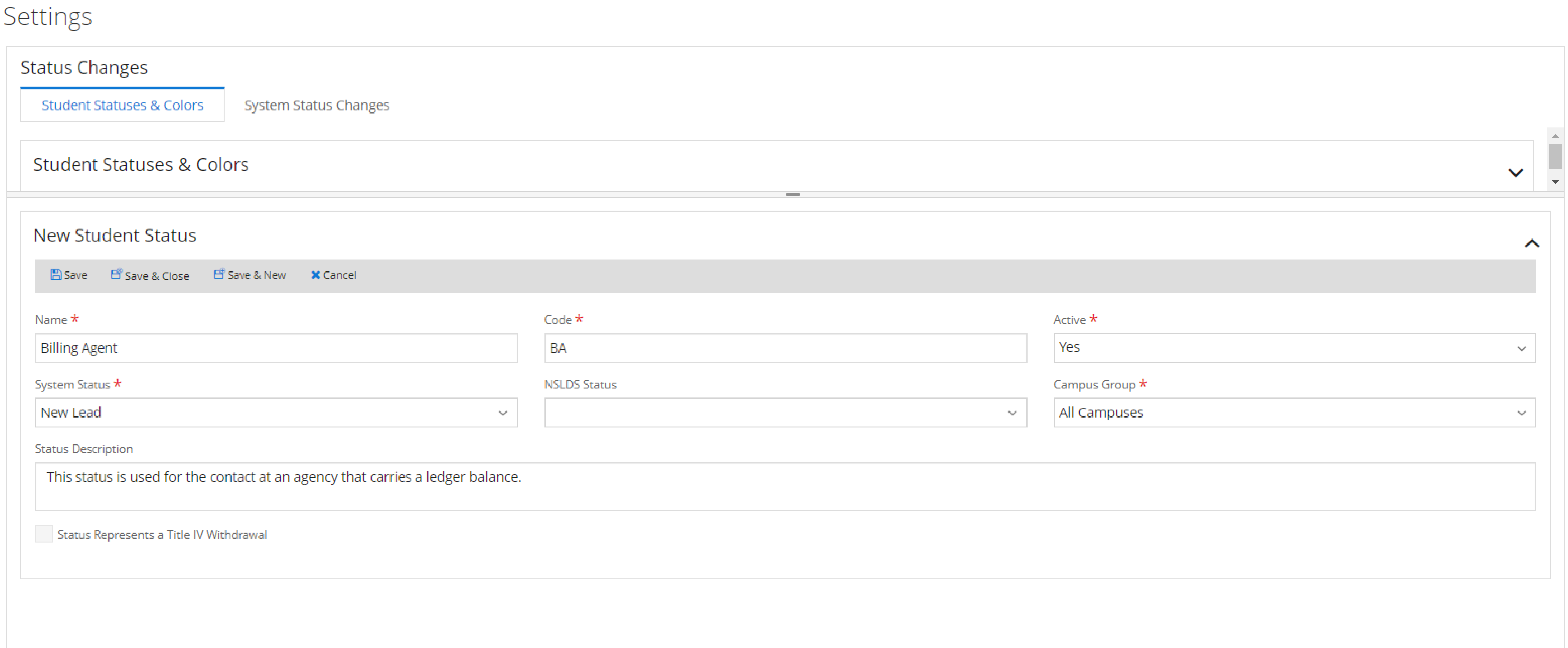
Drag and drop a field row or specify a position to reorder by Move Field.

Add Field | Remove | Preview | Move Field

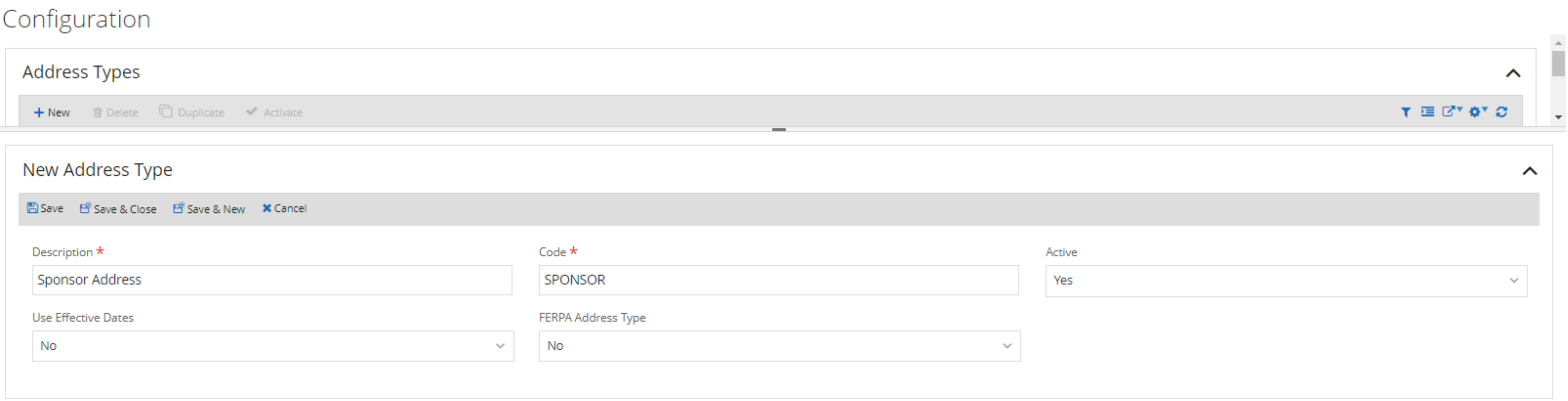
Number	Field Name	Field Type	Required	Conditionally Required Set
1	Prospect Type	Student Profile	Yes	0
2	Last Name	Student Profile	Yes	0
3	First Name	Student Profile	Yes	0
4	Street Address	Student Profile	Yes	0
5	City	Student Profile	Yes	0
6	State	Student Profile	Yes	0
7	ZIP Code/Postal C...	Student Profile	Yes	0
8	Phone Number	Student Profile	No	0
9	Email Address	Student Profile	No	0
10	Mobile Phone Nu...	Student Profile	No	0


Preview - Sponsored Billing Setup
X
Prospect Type *
Default
Sponsored Tuition Led...
Last Name *
First Name *
Street Address *
Default
City *
Default
State *
Default
ZIP Code/Postal Code *
Default
Phone Number
Default
Email Address
Default
Mobile Phone Number
Default
Student Status *
Default
Billing Agent
OK

Create New School Status. This Status will be used to associate with the Billing Agent ledger card to be distinguished from student records (Configuration > Settings > Status Changes). **This Status code value is hard coded in the process, and it must be configured as shown below.**



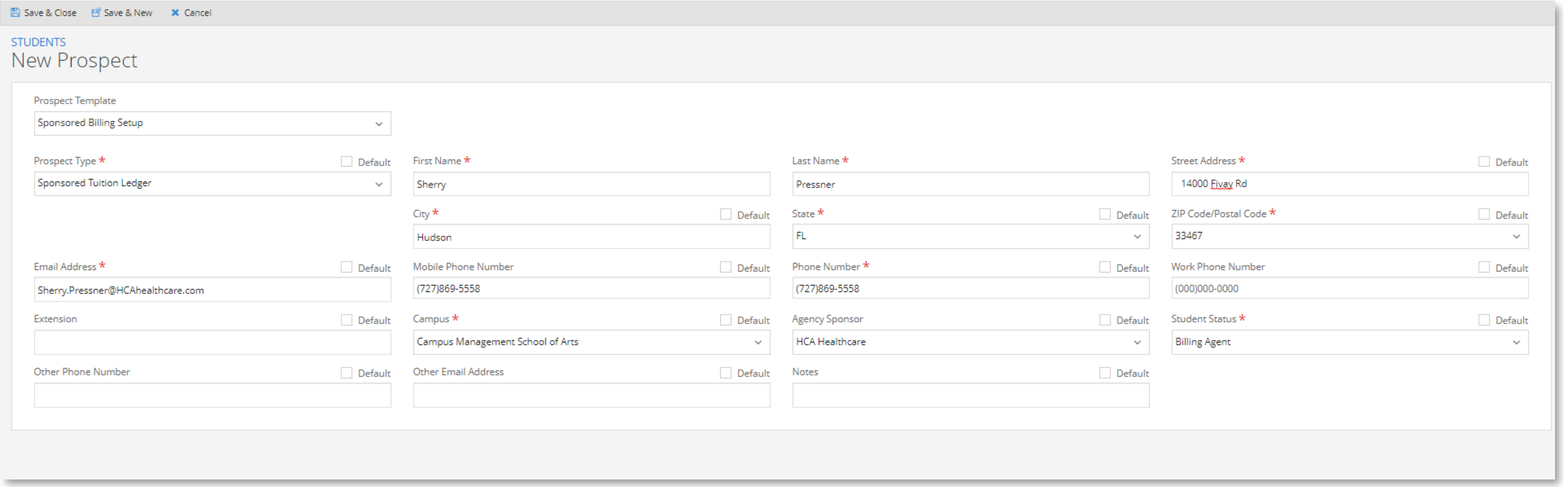
Create a new sponsor address type (Configuration > Contact Manager > Address Types). This address type must be added to all students sponsored by that sponsor. **This Address Type value is hard coded in the process, and it must be configured as shown below.**



Create a sponsor billing code (Configuration > Student Accounts > Transaction Codes). This billing code will be used to associate with the charges when copied from the student ledger to the sponsor ledger. **This Transaction Code value is hard coded in the process, and it must be configured as shown below.**

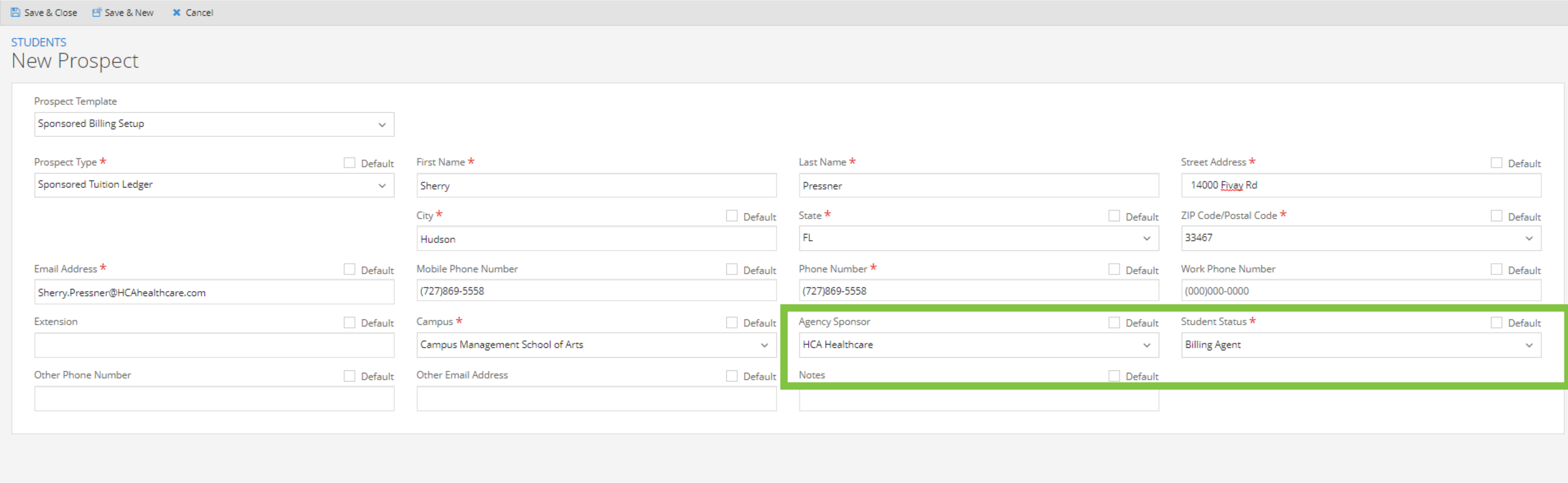
Setting up the Sponsor Ledger Card

- Since Sherry is our contact for billing at the sponsoring organization, we will use her information here as well.
- We have simplified this process through the prospect template. Prospect templates allow the institution to create a Quick Add form that only captures the relevant information needed for this type of contact in the SIS.



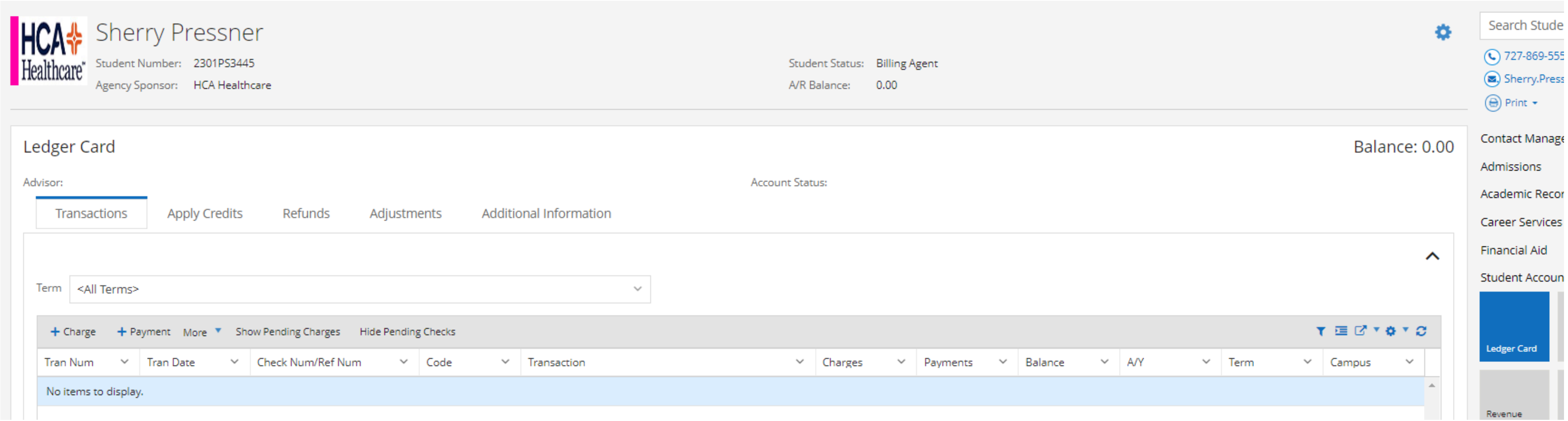
Setting up the Sponsor Ledger Card

Create new Prospect record using the template created earlier.



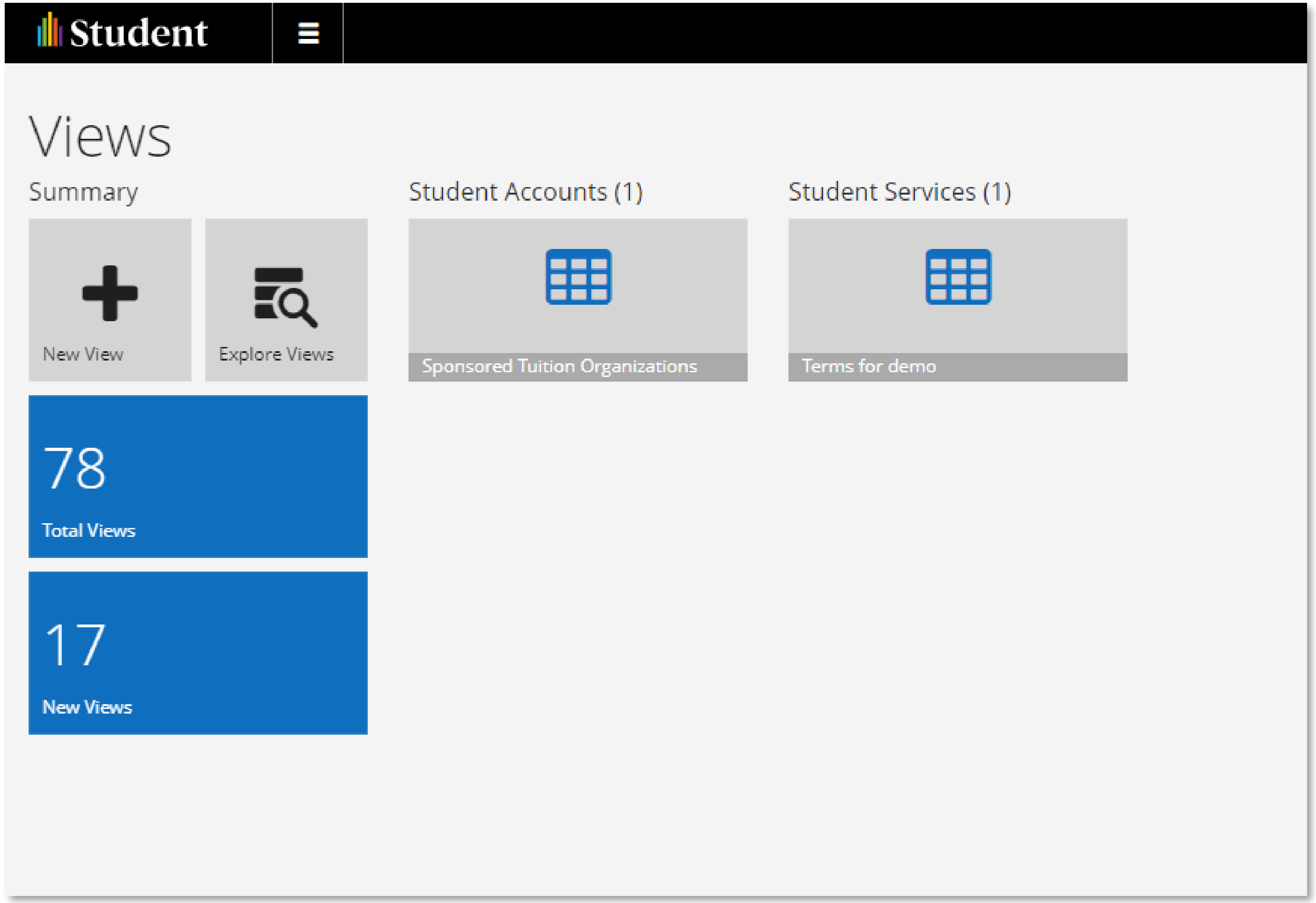
Setting up the Sponsor Ledger Card

- Once the record is saved, we can access Sherry's Profile and Ledger card.
- Note for the users that manage these billing agents, you can see the header has been configured to show their Balance, Status, and Agency Affiliation.



Managing the Sponsoring Billing Organizations (optional)

- A data view with the information based on the [Status of Billing Agent]can be created to populate a dynamic group.
- Sorts the Sponsors by outstanding balance.
- See the contact information for the Sponsoring Agency.
- Navigate directly to the group.



Associating Students to Sponsors

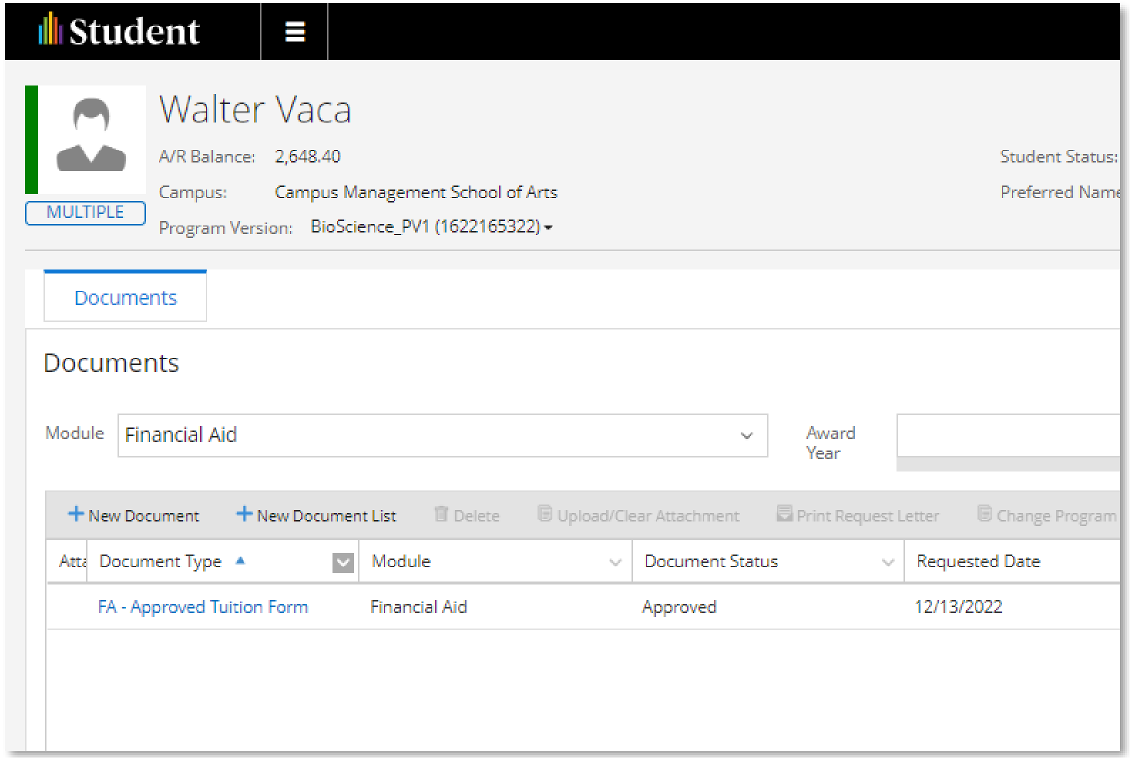
Document On File - optional

Agency Affiliations - required

Document on File - optional

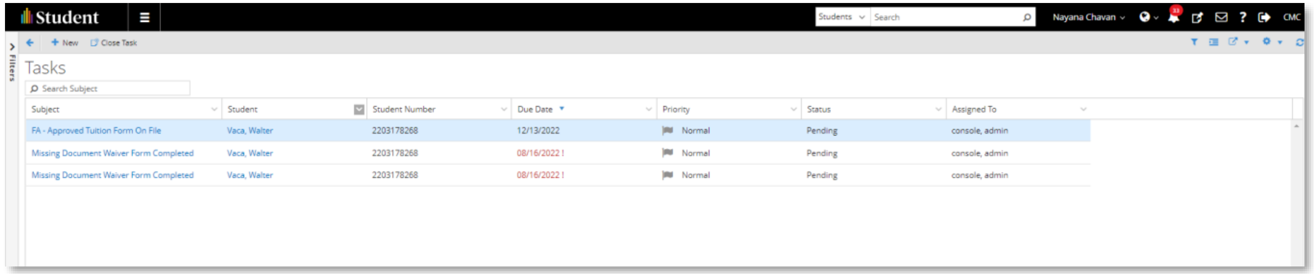
The below steps are optional if the school chooses to add a document on file.

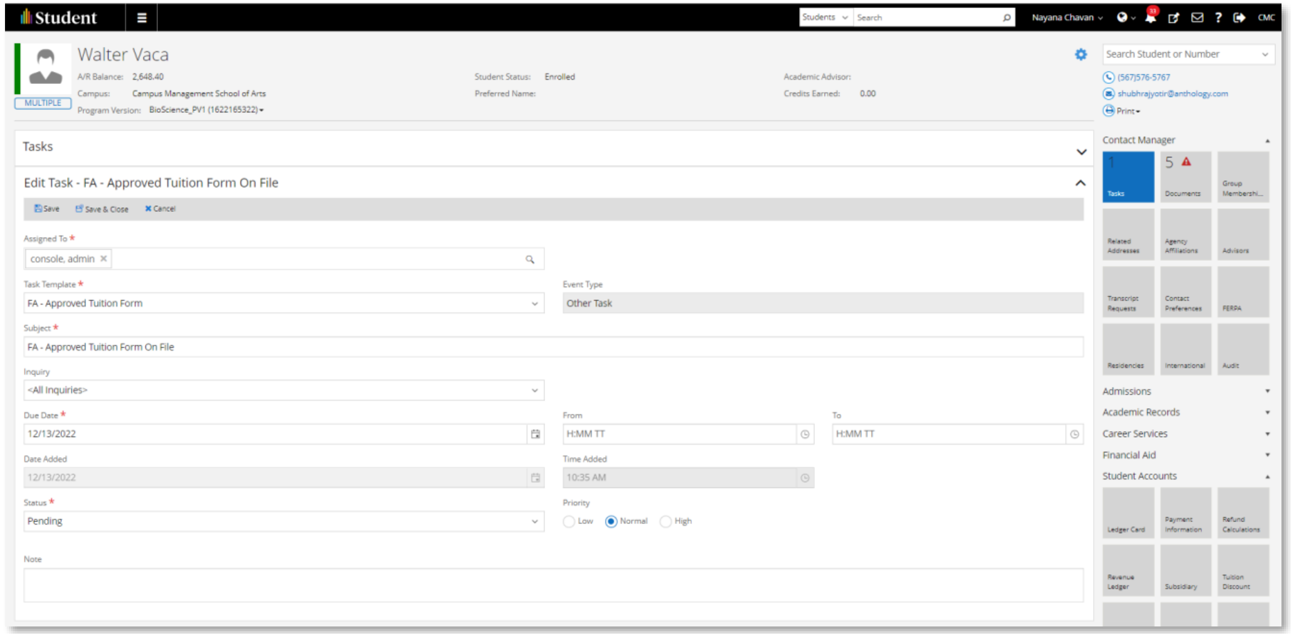
- Add document to be on file and approved for the student.
- This will send a notification to the configured staff member who needs to know that Walter needs to be affiliated with the Agency/Sponsor.
- This document in the Approved Status will allow the Awarding rules to apply the discount to the charges after the student registers for courses.



Creating a Task - optional

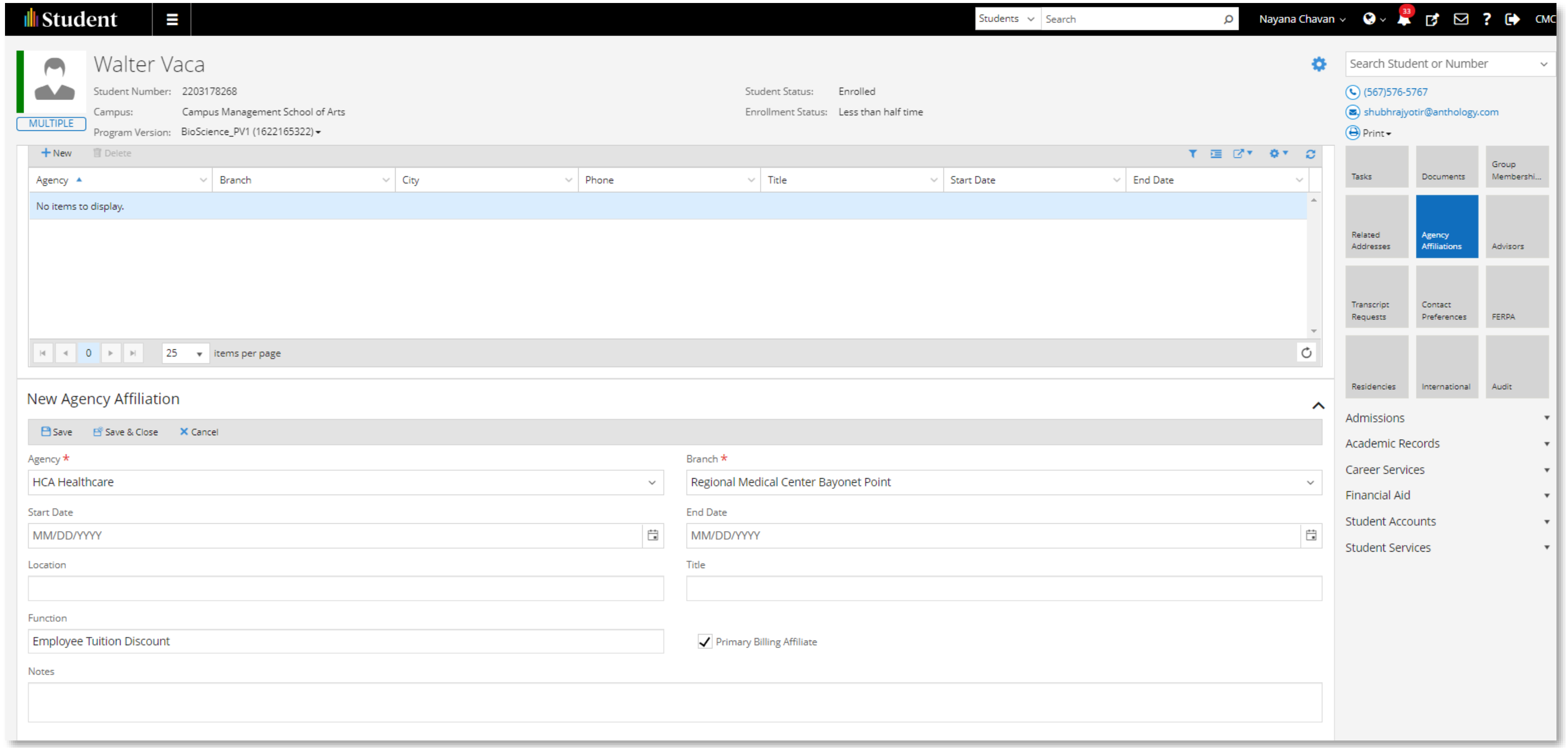
- Task can be also configured to notify staff that a new agreement document has been added for the student.
- Staff can then affiliate the student (in this example Walter) with the sponsoring agency.





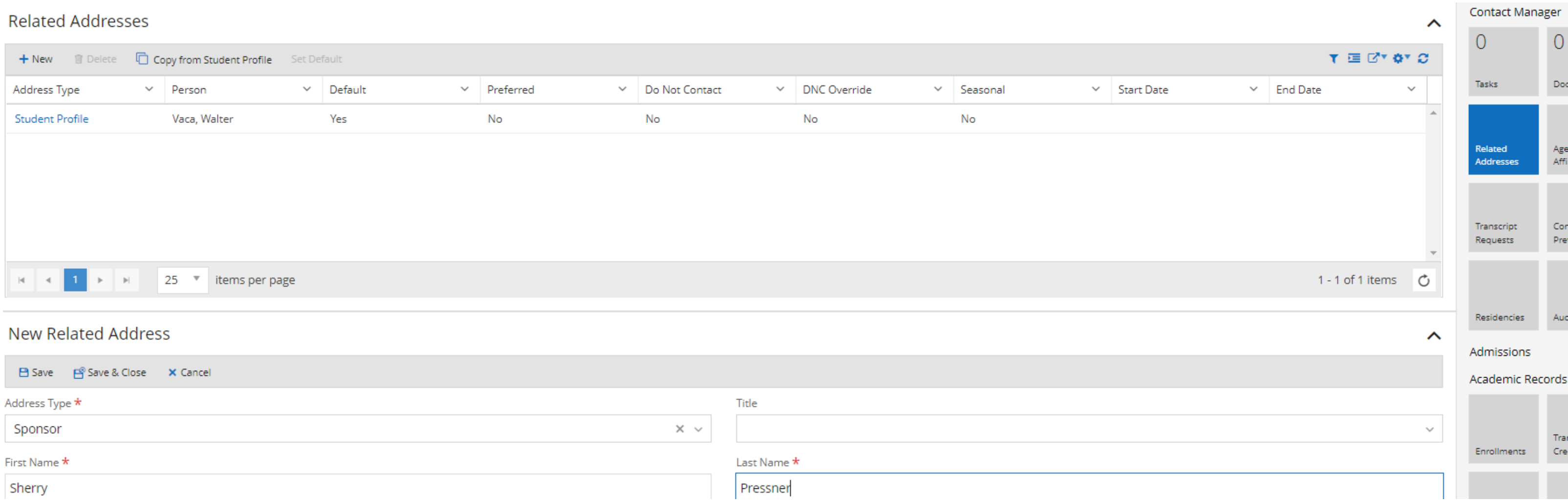
Associating Students to the Sponsors - required

- To associate Walter with HCA Healthcare, navigate to Contact Manager > Agency Affiliations
- Click New.
- Find the Agency.
  - If you want to associate a start and end date you can do that here.
  - Flag that this is the Primary Billing Affiliate that will use the Billing Method tied to the Agency over the one tied to their Enrollment.



Adding Sponsor Address on the Student - required

- Add a sponsor related address on the student (Student Profile > Contact Manager > Related Addresses).
- The address first and last name should be the billing agent responsible for Walter. In our case, it is Sherry Pressner we set up earlier.
- This address will be used when posting a payment on the ledger for the student.

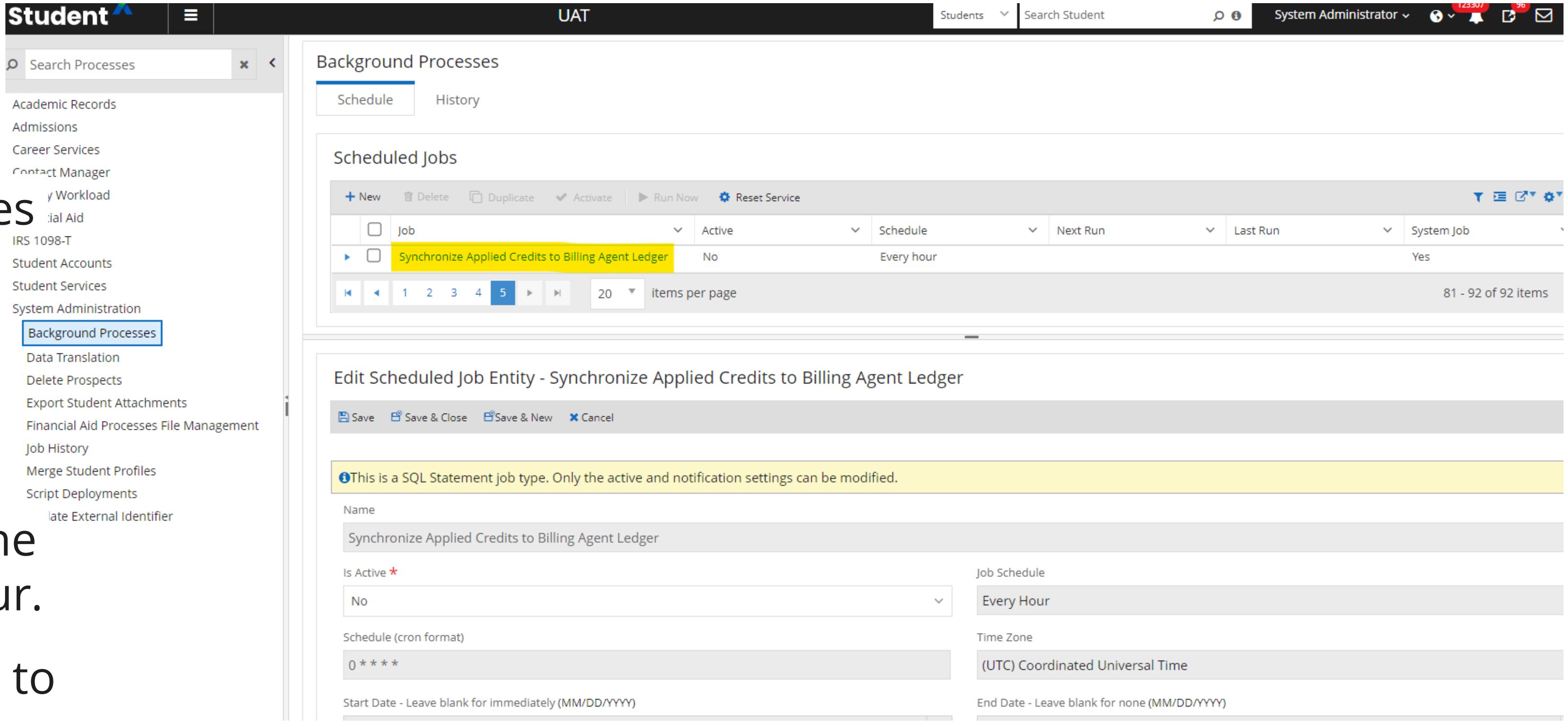


Enable Synchronized Process

Enable Ledger Synchronization Process - required

Enable Ledger Synchronization Process - required

- You must enable the **Synchronize Applied Credits to Billing Agent Ledger** process in Processes > System Administration > Background Processes.
- By default, this process is disabled.
- The default schedule for the process is to run every hour.
- You must have permission to access and edit all the pages listed in this section.



Processing Sponsor Charges and Payments

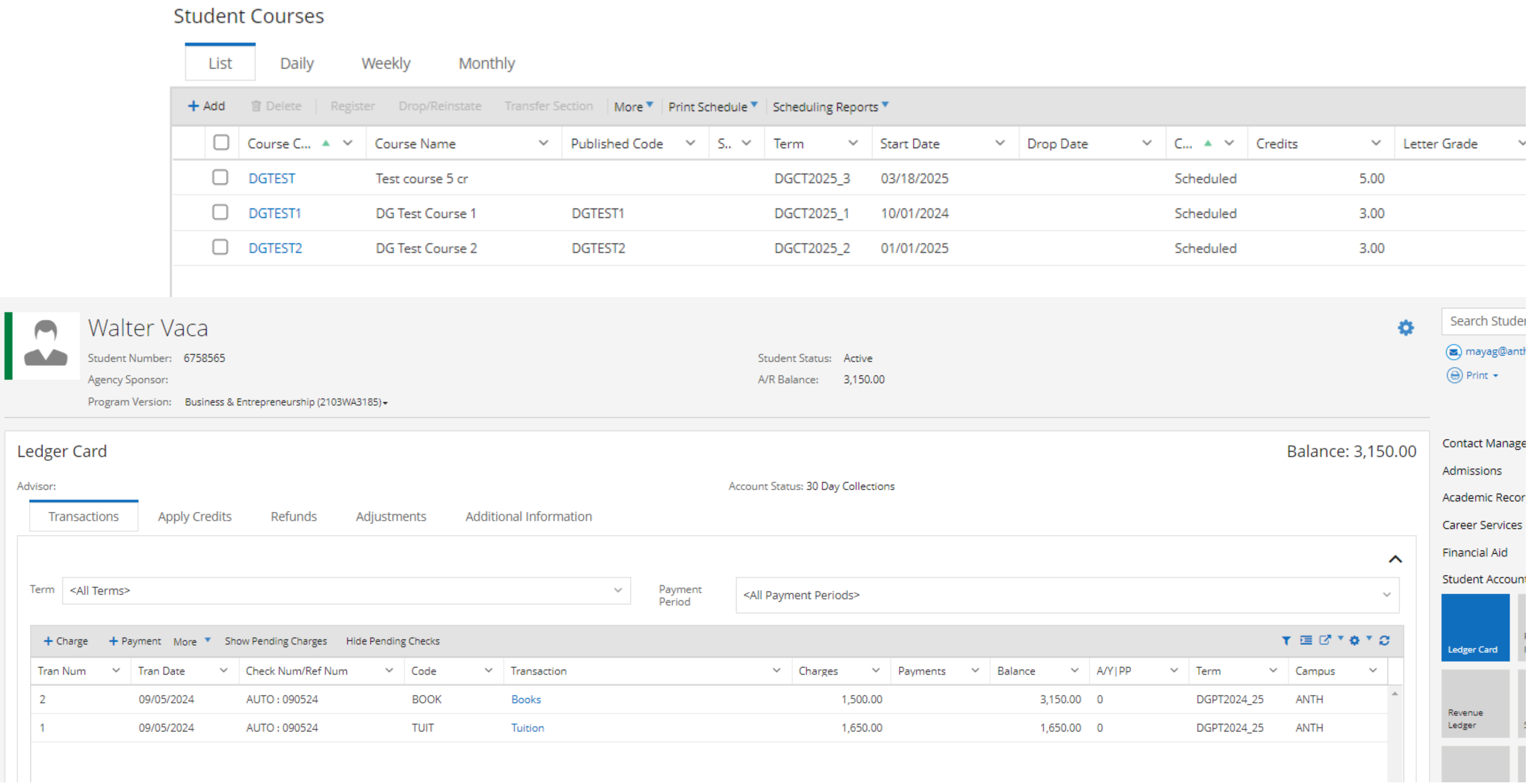
Registering for Classes

Student Registers for Courses for the Term

Charges are Posted to the Ledger

Student Registers for Classes

- Student decides to register for classes for the Fall Term.
- There are two courses at 3 credits per course and one course at 5 credits per course for a total of 11 credits.
- Student billing method is configured for Aggregate Term billing: Tuition = 150$ per credit, Books = 1500$ flat fee



Awarding the Student

Creating an Agency Sponsor Payment Plan

Invoicing the Sponsor

Posting a Payment on the Ledger

Synchronizing the Ledger Cards

Creating an Agency Payment plan

Student Profile > Student Accounts > Payment Plans

- Create an Agency Sponsor payment plan for the term(s) and amount approved to be paid by the Sponsor. In this scenario, HCA Healthcare has agreed to pay for the student's books – 1500$.

Walter Vaca

Student Number: 6758565
Agency Sponsor:
Program Version: Business & Entrepreneurship (2103WA3185)

Student Status: Active
A/R Balance: 0.00

Payment Schedule

+ New Delete Show All

Fund Source	First Payment Date	Amount	Remaining Balance	Billed To	Status	Last Statement Date
SPONSOR	10/01/2024	1,500.00	1,500.00	Regional Medical Center Bayonet P...	Approved	

Process of Invoicing

Processes > Student Accounts >Third Party/Agency invoices

- Schools can run the invoicing process for a single student or a batch of students. This process creates an invoice that can be saved, printed, and associated with the sponsoring agent.
- This process should be completed before the payments are posted on the students' ledgers.
- If the school choses to post the payments through a disbursement batch after the invoicing process then the payments must be adjusted manually on the students to reflect Paid By field and applied correctly.

Processes

Third Party/Agency Invoices

Process | History

Batches

Retry Batch | Cancel Batch | Print Invoice

Name	Number of Records	Invoice Option	Submitted By	Created	Started	Duration	Job Status
Third Party/Agency Invoice ...	1	New	Gavazova, Dobrina	09/05/2024 11:08 AM	09/05/2024 11:08 AM	0h 0m 5s	Succeeded
Third Party/Agency Invoice ...	1	New	Le, Quan	08/15/2024 03:46 PM	08/15/2024 03:46 PM	0h 0m 11s	Succeeded

1 | 5 items per page | 1 - 2 of 2 items

Student	Student Number	Amount	Invoice Number	Job Created	Job Started	Job Status
Vaca, Walter	6758565	1,500.00	1-30	09/05/2024 11:08 AM	09/05/2024 11:08 AM	Succeeded

Invoice Date: 9/5/2024
Invoice Number: 1-30

5 TEst Address
Fort Lauderdale, FL 33308

Sherry Pressnet
14000 Fivay Rd
Hudson, FL 34667

Student Name	**Student ID**	**Amount**	**Date Due**	**Indicate if Past Due**
Vaca, Walter	6758565	$1,500.00	10/1/2024	

Total Amount Due **$1,500.00**

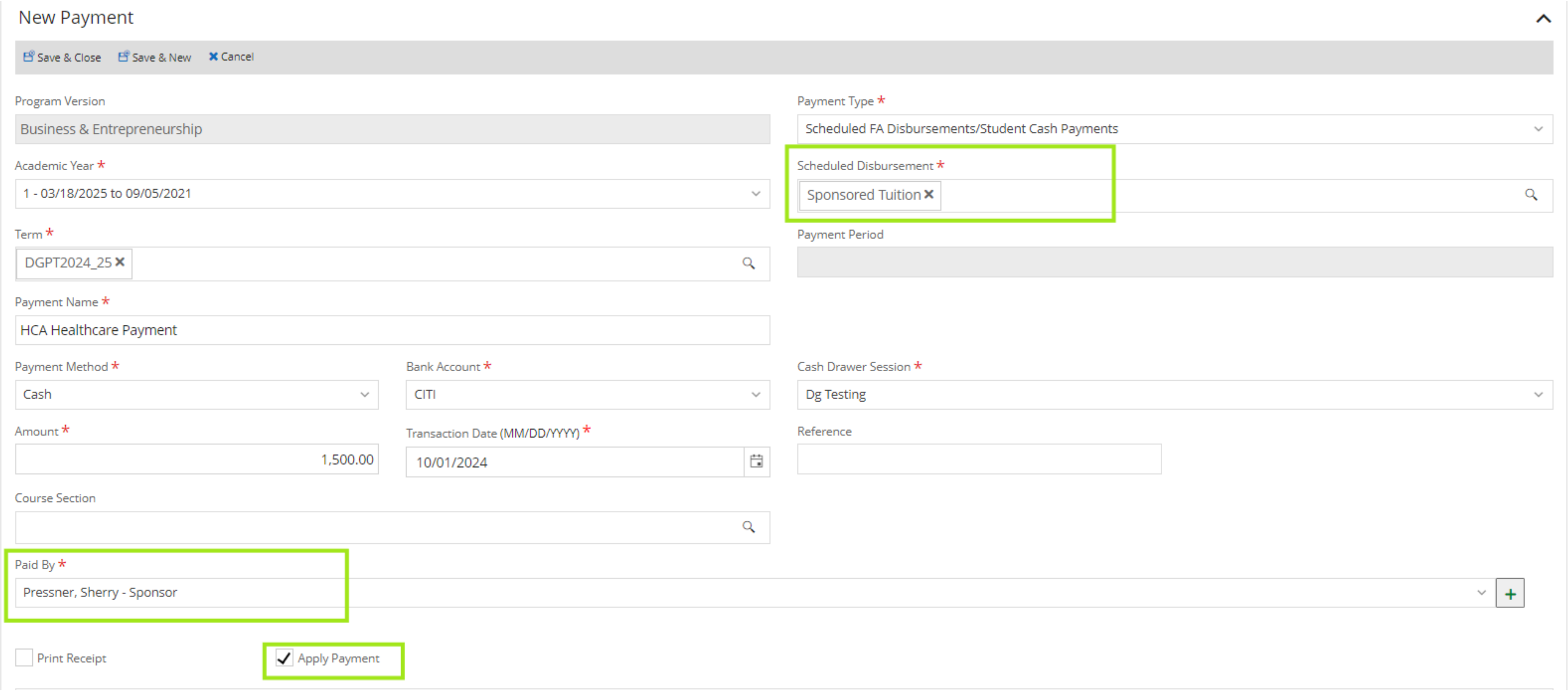
-------------- *We appreciate your support of our students, thank you for your prompt payment!* ----------------------------

Important Message:

Post a Payment on the Student's Ledger Card

Student Profile > Student Accounts > Ledger Card

- Post a payment from the Agency payment plan created
- "Paid By" field should be set to be the Billing Agent



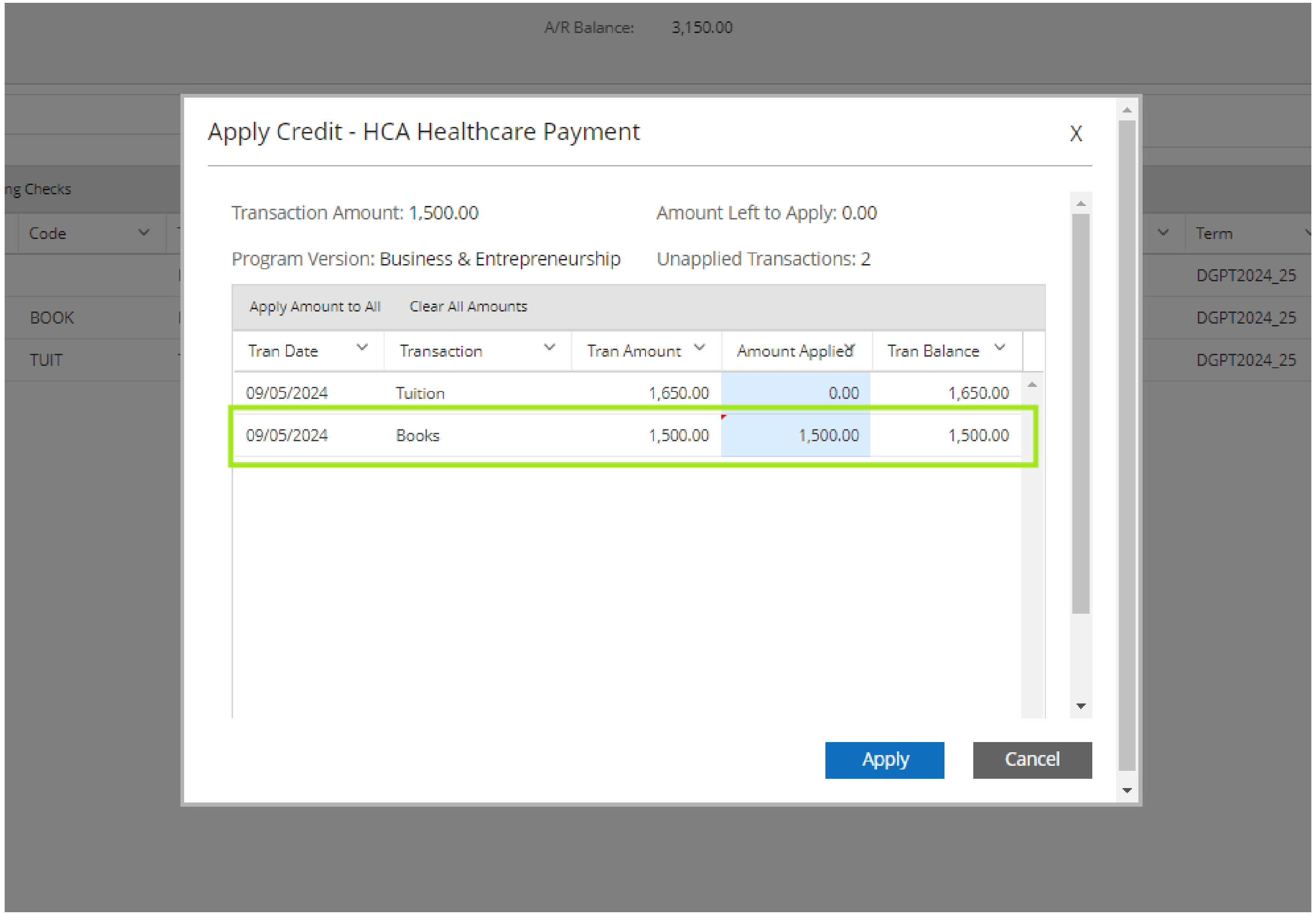
Apply a Payment on the Student's Ledger Card

Student Profile > Student Accounts > Ledger Card

- User applies the credit manually.
- Campus setting must beset to manual apply, Settings > Campus > SA > General

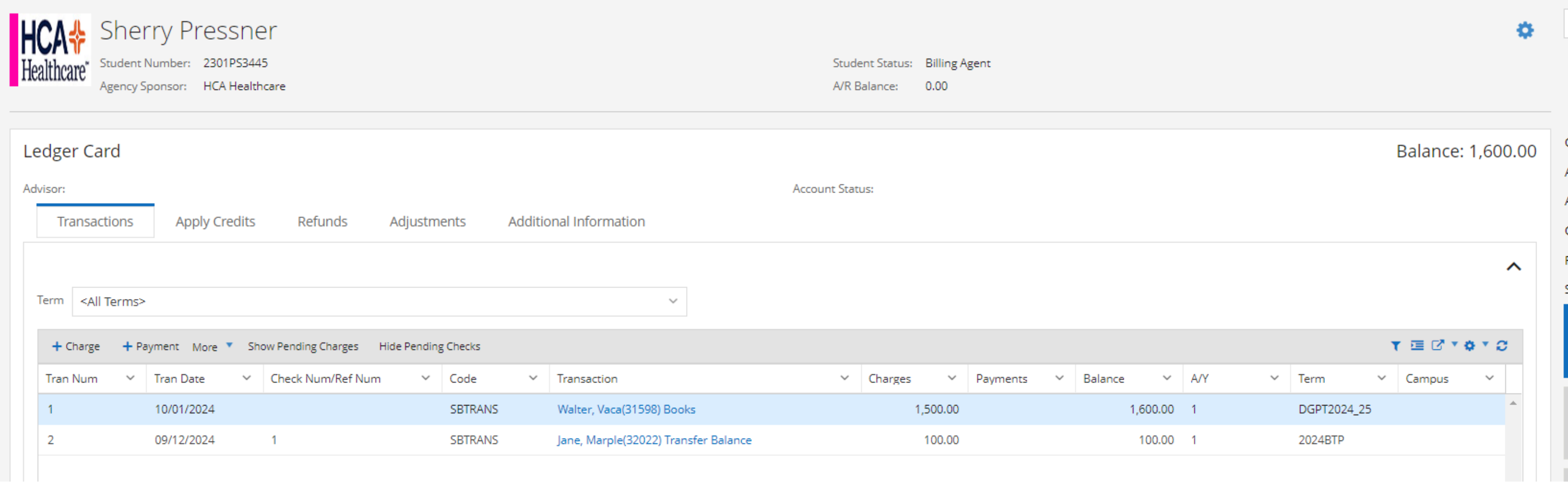
How Should Credits be Applied

Manual/User Applied



Process of Synchronizing the Ledger Cards

- Background Process to Run on a Schedule that will synchronize the ledger card for the students affiliated with the sponsor for the term and that have a payment schedule on file.
- The process identifies all applied payments paid by the sponsor and copies the applicable transactions to the billing agent ledger card as charges.
- The charges on the billing agent ledger card are associated with the SBTRANS billing code created earlier



Summary

Identify students who have relationships with sponsors

Create and manage the sponsor relationships

- Agency
- Fund Source
- Contact
- Ledger
- Billing
- Payment
- Collections

The only customization is the synchronization of the ledgers

Best practice and Limitations

1. To avoid too many manual adjustments on both the student and billing agent ledger, sponsor payments should be posted when billing is finalized for the term (i.e., after the Add/Drop date).
2. Any adjustments or money returns to sponsors are done manually based on the schools' process.
3. To avoid double posting of cash Sponsor Agent ledger card should be offset with a bill code rather than a payment.
4. This process is not suitable for schools using Auto-apply feature
5. There are hard coded configuration items
    - Transaction Code - **SBTRANS**,
    - School Status Code **– BA – Billing Agent**,
    - Address Type code **– SPONSOR**