

Custom Sponsored Billing Process



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

The bottom half of the slide features a dark blue background with a lighter blue geometric shape on the left side, creating a modern, abstract design.

**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

Configuration

Documents

Save Save & Close Save & New Cancel

Name * Letter of Credit Code * LOC Active Yes

Module * Student Accounts Document Type * Receive/Incoming Default Document Status Requested - Not Required

Set Default Due Date

Calculate Days 0 When What

Inbound Transcript No Request Type Campuses * Center for Online Learning x Charleston Education Center x Charleston Naval Base Education Center x Citrus County Education Center x Clay County Education Center x

Assignments

Programs Agencies Department of Veteran Affairs - Vocation x Pasco Sheriff's Office x Qatar Defense Attache' x

Configuration

Documents

Edit Document - Sponsorship Agreement

Save Save & Close Save & New Cancel

Name * Sponsorship Agreement Code * SPONDOC Active Yes

Module * Student Accounts Document Type * Receive/Incoming Default Document Status Requested - Not Required

Set Default Due Date

Calculate Days 0 When What

Inbound Transcript No Request Type Campuses * Center for Online Learning x Charleston Education Center x Charleston Naval Base Education Center x Citrus County Education Center x Clay County Education Center x

Assignments

Programs Agencies

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.

The screenshot shows the 'Edit Task Template' configuration for 'FA - Approved Tuition Form'. The interface includes a 'Task Templates' dropdown at the top. Below it, the title 'Edit Task Template - FA - Approved Tuition Form' is displayed with a search icon and action buttons: 'Save', 'Save & Close', 'Save & New', and 'Cancel'. The form fields are organized into several sections:

- Name:** FA - Approved Tuition Form
- Code:** FA00001
- Campuses:** Campus Management School of Arts
- Active:** Yes
- Category:** Notification - Student Record
- Prompt for Follow-Up:** No
- Duration in Minutes:** 0
- Event Type:** Other Task
- Note:** (Empty text area)
- CRM Integration:** No
- CRM Effective Date:** MM/DD/YYYY

The screenshot shows the 'New Task Schedule' configuration screen. It features a 'Task Schedules' dropdown at the top. The title 'New Task Schedule' is displayed with a search icon and action buttons: 'Save', 'Save & Close', 'Save & New', and 'Cancel'. The form fields are organized into several sections:

- Name:** FA - Approved Tuition Form On File
- Campuses:** Campus Management School of Arts
- Active:** Yes
- Required:** Yes
- Schedule Task For:** Documents
- Documents:** FA - Approved Tuition Form
- Trigger:**
 - When:** Document Status
 - Changes From:** (Empty dropdown)
 - Changes To:** Approved
- Task:**
 - Events:** Other
 - Task Template:** FA - Approved Tuition Form
 - Assign To:** Admission Rep
- When:**
 - Duration:** 0
 - Units:** Hours
 - When:** After
 - Event:** Event Occurred

Sponsoring Agencies (Required)

Setting up the Sponsor

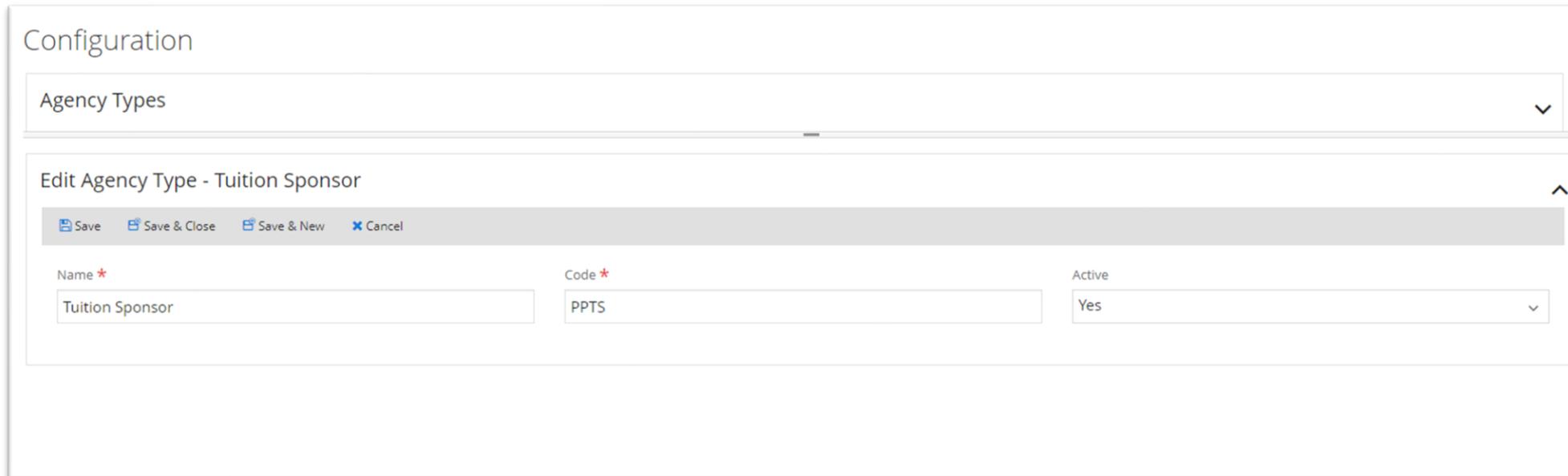
Creating the Sponsor

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

Agency Types

Edit Agency Type - Tuition Sponsor

Save Save & Close Save & New Cancel

Name *	Code *	Active
Tuition Sponsor	PPTS	Yes

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.

The screenshot shows a web form for creating a sponsor. The form is titled 'AGENCIES/BRANCHES' and 'Regional Medical Center Bayonet Point'. The agency is identified as 'HCA Healthcare' and the type is 'Tuition Sponsor'. The form includes several sections:

- Name:** Regional Medical Center Bayonet Point
- Campus Group:** All Campuses
- Invoice Type:** Individual
- Create Disbursement Batch:** No
- Billing Method:** HCA Healthcare
- Last Invoice Number:** (empty field)
- Contact Information:**
 - Phone Number:** (727)891-2929
 - Street Address:** 14000 Fivay Rd
 - City:** Hudson
 - State:** FL
 - ZIP Code/Postal Code:** 34667
 - Country:** United States
 - Note:** (empty text area)

On the right side of the form, there are four tabs: 'General' (selected), 'Contacts', 'Agency Credit Cards', 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.

The screenshot displays a web application interface for managing contacts. The header shows 'AGENCIES/BRANCHES' and 'Regional Medical Center Bayonet Point' with 'Agency: HCA Healthcare' and 'Agency Type: Tuition Sponsor'. The main content area is titled 'Edit Contact - Pressner, Sherry' and includes a toolbar with 'Save', 'Save & Close', 'Save & New', and 'Cancel' buttons. The form fields are as follows:

Field	Value
First Name *	Sherry
Middle Name	
Last Name *	Pressner
Title	
Contact for Invoice	Yes
Phone Number	(727)869-5558
Other Phone Number	(727)819-2929
Email	Sherry.Pressner@HCAhealthcare.com
Fax Number	(000)000-0000
Street Address	14000 Fivay Rd
City	Hudson
State	FL
ZIP Code/Postal Code	334667
Country	United States

On the right side of the interface, there are navigation tabs for 'General', 'Contacts', 'Agency Credit Cards', and 'Student Affiliations', with 'Contacts' currently selected.

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)

Configuration

Prospect Types

New Prospect Type

Save Save & Close Save & New Cancel

Name *
Sponsored Tuition Ledger

Code *
STL

Active
Yes

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](#) [x Remove](#) [Preview](#) [Move Field](#)

[Filter](#) [List](#) [Share](#) [Settings](#) [Refresh](#)

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.**

Settings

Status Changes

- Student Statuses & Colors
- System Status Changes

Student Statuses & Colors

New Student Status

Save Save & Close Save & New Cancel

Name *	Code *	Active *
Billing Agent	BA	Yes
System Status *	NSLDS Status	Campus Group *
New Lead		All Campuses

Status Description
This status is used for the contact at an agency that carries a ledger balance.

Status Represents a Title IV Withdrawal

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.**

Configuration

Address Types

+ New Delete Duplicate Activate

New Address Type

Save Save & Close Save & New Cancel

Description *	Code *	Active
<input type="text" value="Sponsor Address"/>	<input type="text" value="SPONSOR"/>	<input type="text" value="Yes"/>
Use Effective Dates	FERPA Address Type	
<input type="text" value="No"/>	<input type="text" value="No"/>	

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.**

New Transaction Code

Save Save & Close Save & New Cancel

Name *	Code *	Campuses *
<input type="text" value="Sponsored Billing Transaction"/>	<input type="text" value="SBTRANS"/>	<input type="text" value="Anthology Campus"/>
Active	Transaction Type	
<input type="text" value="Yes"/>	<input type="text" value="Student"/>	

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.

STUDENTS
New Prospect

Prospect Template
Sponsored Billing Setup

Prospect Type * Default
Sponsored Tuition Ledger

First Name *
Sherry

City * Default
Hudson

Mobile Phone Number Default
(727)869-5558

Campus * Default
Campus Management School of Arts

Other Email Address Default

Last Name *
Pressner

State * Default
FL

Phone Number * Default
(727)869-5558

Agency Sponsor Default
HCA Healthcare

Notes Default

Street Address * Default
14000 Elixav Rd

ZIP Code/Postal Code * Default
33467

Work Phone Number Default
(000)000-0000

Student Status * Default

Billing Agent Default

Email Address * Default
Sherry.Pressner@HCAhealthcare.com

Extension Default

Other Phone Number Default

Setting up the Sponsor Ledger Card

Create new Prospect record using the template created earlier.

Save & Close Save & New Cancel

STUDENTS
New Prospect

Prospect Template Sponsored Billing Setup	Prospect Type * Sponsored Tuition Ledger	First Name * Sherry	Last Name * Pressner	Street Address * 14000 Eivay Rd
Email Address * Sherry.Pressner@HCAhealthcare.com	City * Hudson	State * FL	ZIP Code/Postal Code * 33467	Work Phone Number (000)000-0000
Extension [Empty]	Mobile Phone Number (727)869-5558	Phone Number * (727)869-5558	Agency Sponsor HCA Healthcare	Student Status * Billing Agent
Other Phone Number [Empty]	Campus * Campus Management School of Arts	Other Email Address [Empty]	Notes [Empty]	

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.

The screenshot shows the HCA Healthcare system interface for a student's ledger card. At the top left, the HCA Healthcare logo is displayed next to the student's name, Sherry Pressner. Below the name, the student number (2301PS3445) and agency sponsor (HCA Healthcare) are listed. On the right side of the header, the student status is 'Billing Agent' and the A/R balance is '0.00'. A search bar and navigation menu are visible on the far right.

The main section is titled 'Ledger Card' and shows a balance of '0.00'. Below this, there are tabs for 'Transactions', 'Apply Credits', 'Refunds', 'Adjustments', and 'Additional Information'. The 'Transactions' tab is selected. A dropdown menu for 'Term' is set to '<All Terms>'. Below the dropdown, there are buttons for '+ Charge', '+ Payment', and 'More', along with 'Show Pending Charges' and 'Hide Pending Checks'. A table with columns for 'Tran Num', 'Tran Date', 'Check Num/Ref Num', 'Code', 'Transaction', 'Charges', 'Payments', 'Balance', 'A/Y', 'Term', and 'Campus' is shown. The table currently displays 'No items to display.'

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.

The screenshot displays the 'Student Views' dashboard. At the top, there is a header with the 'Student' logo and a menu icon. Below the header, the main content area is titled 'Views' and includes a 'Summary' section. This section features two buttons: 'New View' (with a plus icon) and 'Explore Views' (with a magnifying glass icon). To the right of the 'Summary' section, there are two view cards: 'Student Accounts (1)' with a grid icon and the label 'Sponsored Tuition Organizations', and 'Student Services (1)' with a grid icon and the label 'Terms for demo'. Below the 'Summary' section, there are two large blue boxes: the first shows '78 Total Views' and the second shows '17 New Views'.

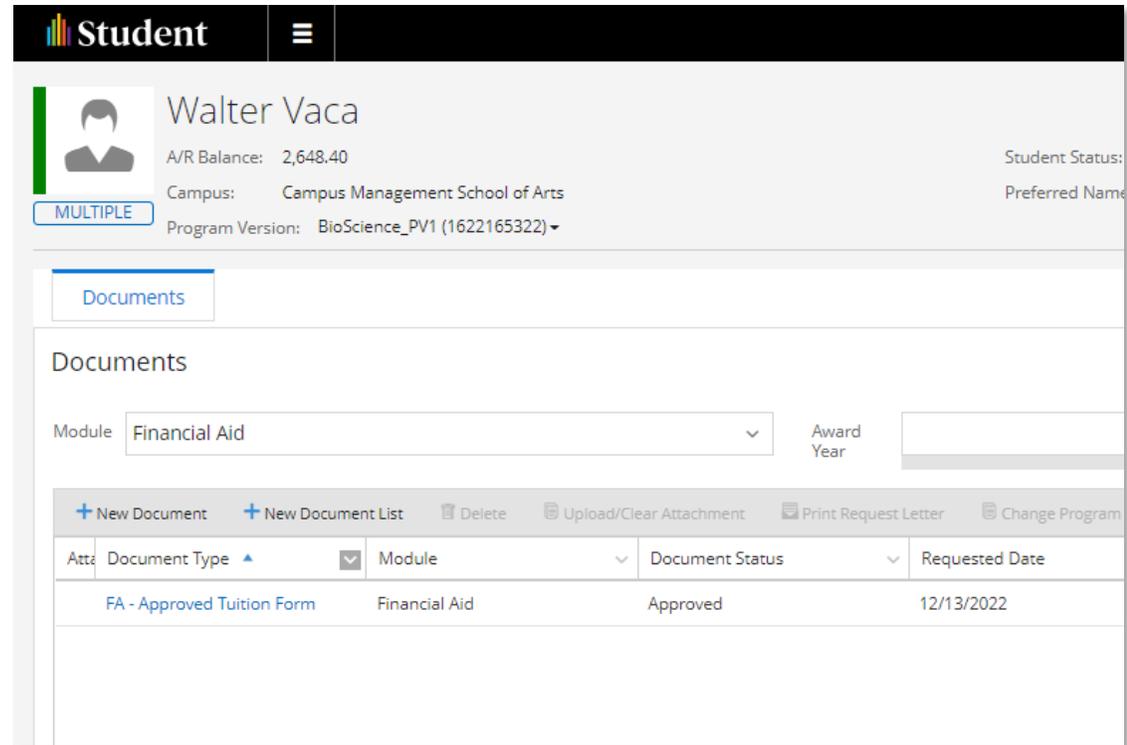
Associating Students to Sponsors

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.

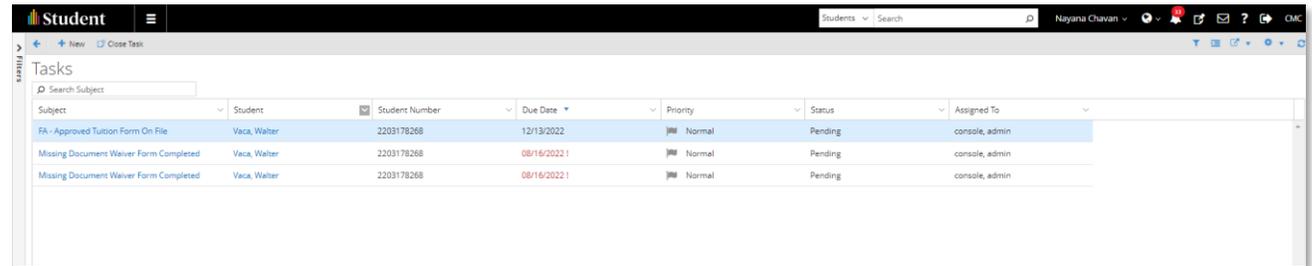


The screenshot shows a student profile for Walter Vaca. The profile includes a name, a photo placeholder, and a 'MULTIPLE' button. Key information includes an A/R Balance of 2,648.40, a Campus of 'Campus Management School of Arts', and a Program Version of 'BioScience_PV1 (1622165322)'. The 'Documents' section is active, showing a dropdown for 'Financial Aid' and an 'Award Year' field. Below this is a toolbar with actions like '+ New Document', '+ New Document List', 'Delete', 'Upload/Clear Attachment', 'Print Request Letter', and 'Change Program'. A table lists document entries with columns for 'Att', 'Document Type', 'Module', 'Document Status', and 'Requested Date'. One entry is visible: 'FA - Approved Tuition Form' under Document Type, 'Financial Aid' under Module, 'Approved' under Document Status, and '12/13/2022' under Requested Date.

Att	Document Type	Module	Document Status	Requested Date
	FA - Approved Tuition Form	Financial Aid	Approved	12/13/2022

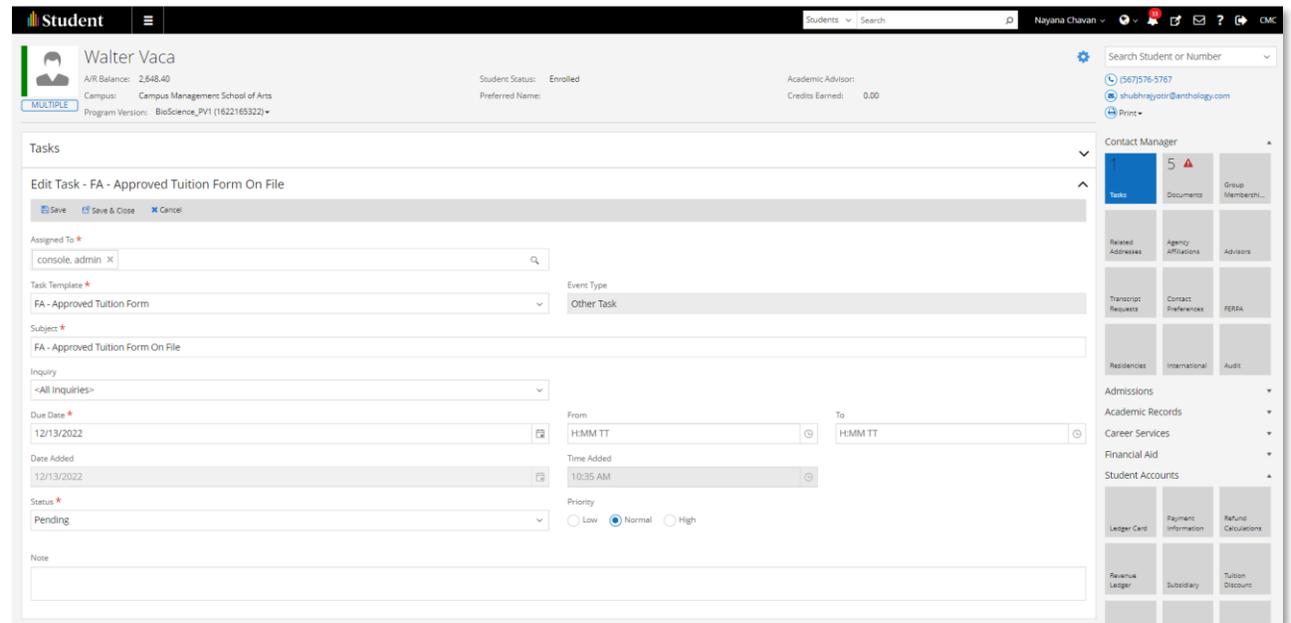
Creating a Task - optional

- 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.



The screenshot shows a web application interface for a 'Student' record. At the top, there is a search bar and user information for 'Nayana Chavan'. Below this is a 'Tasks' section with a search field and a table of tasks. The table has columns for Subject, Student, Student Number, Due Date, Priority, Status, and Assigned To. Three tasks are listed, all with a status of 'Pending' and assigned to 'console, admin'.

Subject	Student	Student Number	Due Date	Priority	Status	Assigned To
FA - Approved Tuition Form On File	Vaca, Walter	2203178268	12/13/2022	Normal	Pending	console, admin
Missing Document Waiver Form Completed	Vaca, Walter	2203178268	08/16/2022	Normal	Pending	console, admin
Missing Document Waiver Form Completed	Vaca, Walter	2203178268	08/16/2022	Normal	Pending	console, admin



The screenshot shows the 'Edit Task' form for a student named 'Walter Vaca'. The form is titled 'Edit Task - FA - Approved Tuition Form On File' and includes fields for 'Assigned To' (set to 'console, admin'), 'Task Template' (set to 'FA - Approved Tuition Form'), 'Subject' (set to 'FA - Approved Tuition Form On File'), 'Due Date' (set to '12/13/2022'), 'Date Added' (set to '12/13/2022'), 'Status' (set to 'Pending'), and 'Priority' (set to 'Normal'). There are also fields for 'From' and 'To' (both set to 'HMM TT') and 'Time Added' (set to '10:35 AM'). A 'Note' field is at the bottom. The right sidebar shows a 'Contact Manager' with various contact options like 'Advisors', 'FERPA', and 'Payment Information'.

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.

The screenshot displays the 'Student' system interface for a user named Walter Vaca. The top navigation bar includes the 'Student' logo, a search bar, and the user's name 'Nayana Chavan'. The main header shows the student's profile: 'Walter Vaca', 'Student Number: 2203178268', 'Campus: Campus Management School of Arts', 'Program Version: BioScience_PV1 (1622165322)', 'Student Status: Enrolled', and 'Enrollment Status: Less than half time'. Below the header is a table with columns for Agency, Branch, City, Phone, Title, Start Date, and End Date. The table is currently empty, displaying 'No items to display.' Below the table is a 'New Agency Affiliation' form. The form includes fields for Agency (HCA Healthcare), Branch (Regional Medical Center Bayonet Point), Start Date, End Date, Location, Title, Function (Employee Tuition Discount), and a checkbox for 'Primary Billing Affiliate' which is checked. There are also 'Save', 'Save & Close', and 'Cancel' buttons at the top of the form. A sidebar on the right contains various navigation options such as 'Tasks', 'Documents', 'Group Memberships', 'Related Addresses', 'Agency Affiliations', 'Advisors', 'Transcript Requests', 'Contact Preferences', 'FERPA', 'Residencies', 'International', 'Audit', 'Admissions', 'Academic Records', 'Career Services', 'Financial Aid', 'Student Accounts', and 'Student Services'.

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.

The screenshot displays the 'Related Addresses' section of a software interface. At the top, there are navigation buttons: '+ New', 'Delete', 'Copy from Student Profile', and 'Set Default'. Below this is a table with columns for 'Address Type', 'Person', 'Default', 'Preferred', 'Do Not Contact', 'DNC Override', 'Seasonal', 'Start Date', and 'End Date'. A single row is visible with the following values: 'Student Profile', 'Vaca, Walter', 'Yes', 'No', 'No', 'No', 'No'. Below the table is a pagination bar showing '1' of 1 items per page. Below the table is a 'New Related Address' form with the following fields: 'Address Type *' (dropdown menu with 'Sponsor' selected), 'Title' (text input), 'First Name *' (text input with 'Sherry'), and 'Last Name *' (text input with 'Pressner').

Address Type	Person	Default	Preferred	Do Not Contact	DNC Override	Seasonal	Start Date	End Date
Student Profile	Vaca, Walter	Yes	No	No	No	No		

New Related Address

Save Save & Close Cancel

Address Type * Sponsor Title

First Name * Sherry Last Name * Pressner

**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.

The screenshot displays the Student UAT interface. On the left, a navigation menu lists various system administration tasks, with 'Background Processes' highlighted. The main content area shows a table of 'Scheduled Jobs'. One job, 'Synchronize Applied Credits to Billing Agent Ledger', is selected and highlighted in yellow. Below the table, the 'Edit Scheduled Job Entity' form is open, showing the job name, 'Is Active' set to 'No', and 'Job Schedule' set to 'Every Hour'. A warning message states: 'This is a SQL Statement job type. Only the active and notification settings can be modified.'

Job	Active	Schedule	Next Run	Last Run	System Job
Synchronize Applied Credits to Billing Agent Ledger	No	Every hour			Yes

Edit Scheduled Job Entity - Synchronize Applied Credits to Billing Agent Ledger

Is Active *
No

Job Schedule
Every Hour

Schedule (cron format)
0 * * * *

Time Zone
(UTC) Coordinated Universal Time

Start Date - Leave blank for immediately (MM/DD/YYYY)

End Date - Leave blank for none (MM/DD/YYYY)

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

Student Courses

List Daily Weekly Monthly

+ Add Delete Register Drop/Reinstate Transfer Section More Print Schedule Scheduling Reports

<input type="checkbox"/>	Course C...	Course Name	Published Code	S..	Term	Start Date	Drop Date	C...	Credits	Letter Grade
<input type="checkbox"/>	DGTEST	Test course 5 cr			DGCT2025_3	03/18/2025		Scheduled	5.00	
<input type="checkbox"/>	DGTEST1	DG Test Course 1	DGTEST1		DGCT2025_1	10/01/2024		Scheduled	3.00	
<input type="checkbox"/>	DGTEST2	DG Test Course 2	DGTEST2		DGCT2025_2	01/01/2025		Scheduled	3.00	

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

Student Status: Active
 A/R Balance: 3,150.00

Search Student
 mayag@ant
 Print

Contact Manage
 Admissions
 Academic Recor
 Career Services
 Financial Aid
 Student Account
 Ledger Card
 Revenue Ledger

Ledger Card

Balance: 3,150.00

Advisor: Account Status: 30 Day Collections

Transactions Apply Credits Refunds Adjustments Additional Information

Term: <All Terms> Payment Period: <All Payment Periods>

+ Charge	+ Payment	More	Show Pending Charges	Hide Pending Checks	Tran Num	Tran Date	Check Num/Ref Num	Code	Transaction	Charges	Payments	Balance	A/Y PP	Term	Campus
					2	09/05/2024	AUTO : 090524	BOOK	Books	1,500.00		3,150.00	0	DGPT2024_25	ANTH
					1	09/05/2024	AUTO : 090524	TUIT	Tuition	1,650.00		1,650.00	0	DGPT2024_25	ANTH

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 Student Status: Active

Agency Sponsor: A/R Balance: 0.00

Program Version: Business & Entrepreneurship (2103WA3185) ▾

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 chooses 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 - 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

5 TEst Address
Fort Lauderdale, FL 33308

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

Sherry Pressnet
14000 Fivay Rd
Hudson, FL 34667

<u>Student Name</u>	<u>Student ID</u>	<u>Amount</u>	<u>Date Due</u>	<u>Indicate if Past Due</u>
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

New Payment

Save & Close Save & New Cancel

Program Version
Business & Entrepreneurship

Academic Year *
1 - 03/18/2025 to 09/05/2021

Term *
DGPT2024_25

Payment Name *
HCA Healthcare Payment

Payment Method *
Cash

Bank Account *
CITI

Amount *
1,500.00

Transaction Date (MM/DD/YYYY) *
10/01/2024

Course Section

Paid By *
Pressner, Sherry - Sponsor

Payment Type *
Scheduled FA Disbursements/Student Cash Payments

Scheduled Disbursement *
Sponsored Tuition

Payment Period

Cash Drawer Session *
Dg Testing

Reference

Print Receipt Apply Payment

Apply a Payment on the Student's Ledger Card

Student Profile > Student Accounts > Ledger Card

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

How Should Credits be Applied

Manual/User Applied

A/R Balance: 3,150.00

Apply Credit - HCA Healthcare Payment

Transaction Amount: 1,500.00 Amount Left to Apply: 0.00

Program Version: Business & Entrepreneurship Unapplied Transactions: 2

Apply Amount to All Clear All Amounts

Tran Date	Transaction	Tran Amount	Amount Applied	Tran Balance
09/05/2024	Tuition	1,650.00	0.00	1,650.00
09/05/2024	Books	1,500.00	1,500.00	1,500.00

Apply Cancel

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

HCA Healthcare Sherry Pressner
Student Number: 2301PS3445
Agency Sponsor: HCA Healthcare

Student Status: Billing Agent
A/R Balance: 0.00

Ledger Card Balance: 1,600.00

Advisor: Account Status:

Transactions | Apply Credits | Refunds | Adjustments | Additional Information

Term: <All Terms>

Tran Num	Tran Date	Check Num/Ref Num	Code	Transaction	Charges	Payments	Balance	A/Y	Term	Campus
1	10/01/2024		SBTRANS	Walter, Vaca(31598) Books	1,500.00		1,600.00	1	DGPT2024_25	
2	09/12/2024	1	SBTRANS	Jane, Marple(32022) Transfer Balance	100.00		100.00	1	2024BTP	

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**