Compass

Billing
A Parent's Guide

An introduction to making Payments in Compass

- Payment Types & Methods
- Providing Consent & Payment for School Trips
- Managing your Payments
- Generating Receipts

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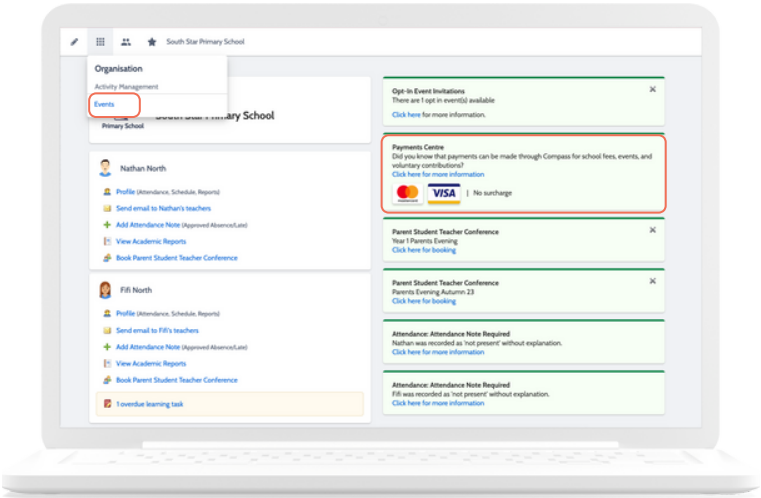
A Parent's Guide to Billing

How to: Access Compass Payments

Web Browser

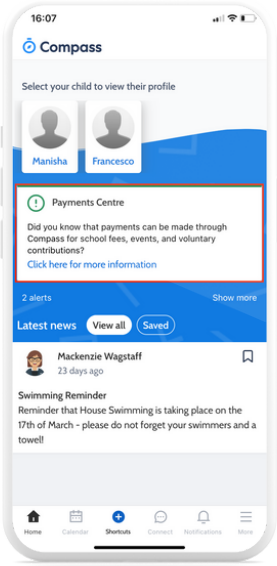
Click on the link in the alert banner on your Home Page to access the Payments Centre



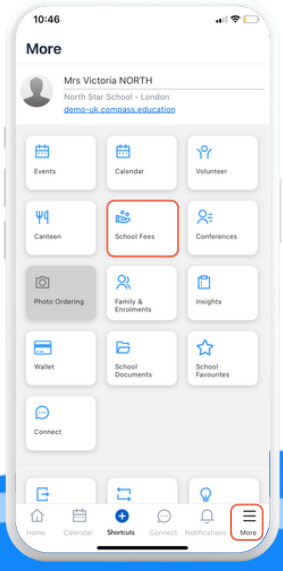
Or Access the Payments Centre through the Grid Icon in the main navigation menu. Select 'Events' to be directed to the Action Centre

Compass App

Click on the link in the alert banner on your Home Page to access the Payments Centre



Or Access the Payments Centre through the More menu in the navigation bar. Select 'School Fees' to be directed to the Action Centre



It's Easy and Convenient!

The Compass Payments Centre allows you to pay anytime, anywhere.

* The set up of your payments and fees may vary from the examples in this guide. Please contact the school office for assistance.

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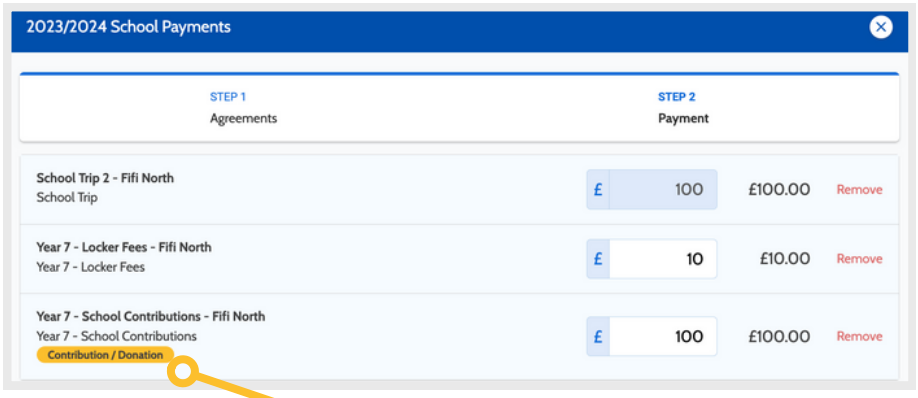
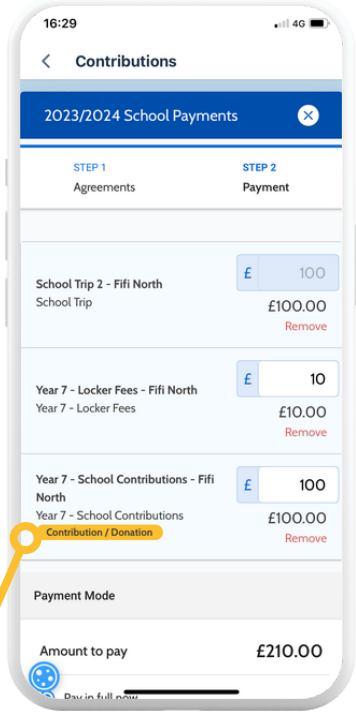
Payment Types

The payments that display in your Compass portal have been set up by your child's school. Each payment or charge will detail whether it is a Standard Fee or a Donation. Standard Fees are required by the school and will contribute to your 'owed' balance. Contribution / Donation amounts are voluntary and do not contribute to your 'owed' balance.





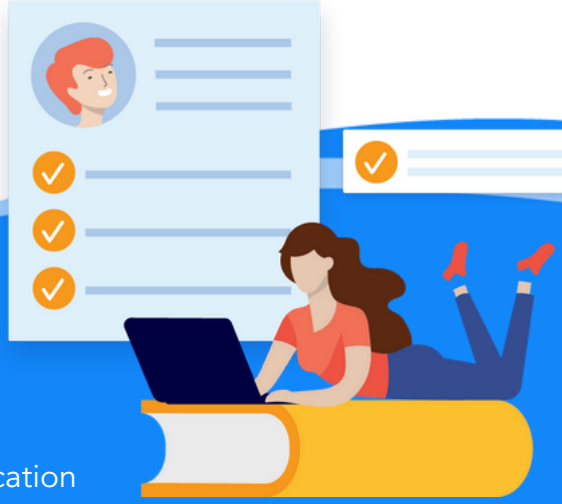
Contribution / Donation

This orange banner denotes that a payment is a Donation and, therefore, is voluntary.

Contribution / Donation Payments

These items are only payable once, and will default a £0 contribution. You can change this amount to a chosen donation amount, or leave it as £0. Once you finalise a payment for this Contribution, the item will no longer be payable, and will not show the next time you log into your school portal. Only items without this flag will remain payable until the full amount has been paid.

Note: If you cannot see this orange flag, it is likely that all the payments visible to you are **Standard Fees** and the school requires you to pay them.



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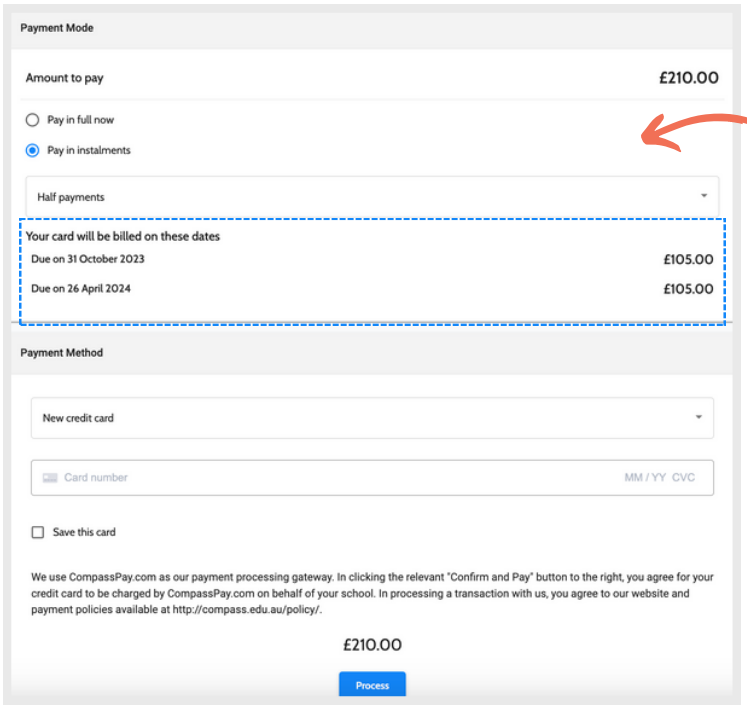
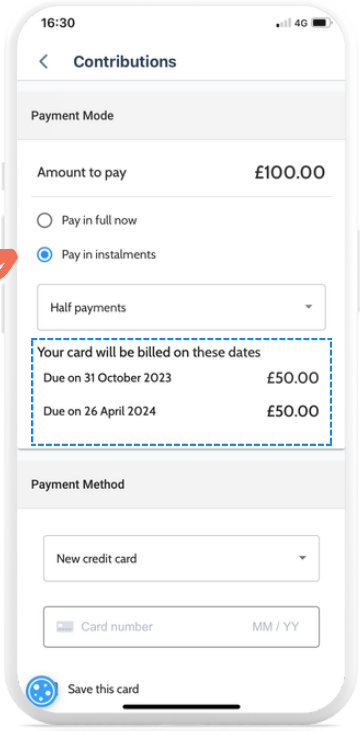
Payment Methods

Pay in Full or in Instalments

If your school has set up Payment Plans, you will have the option to Pay in Full or Pay in Instalments. If you select to 'Pay in instalments' you will see a dropdown menu, listing the instalment options set up by the school - with the relevant dates and charges. By selecting this option, a Direct Debit is set up and you will be billed on the dates displayed.

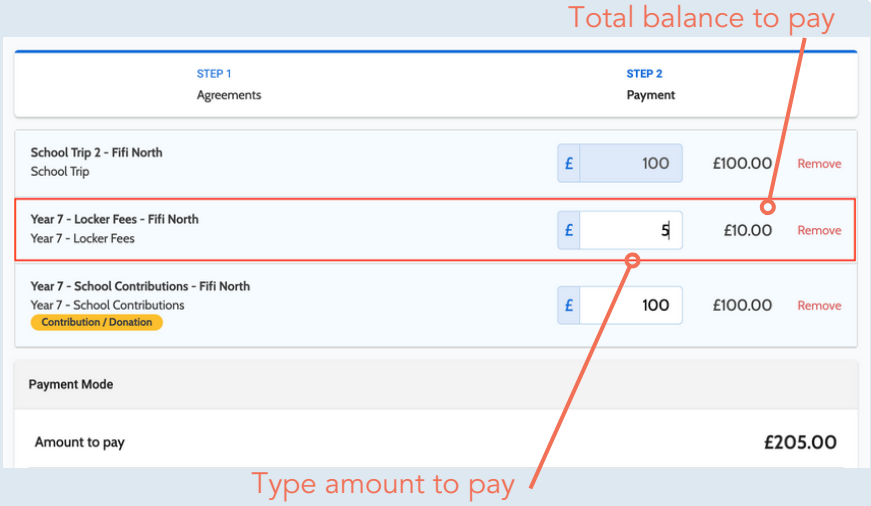


Pay in full now or Pay in instalments



Chip Away

If your school allows it, you may be able to chip away at your payments over time. If this feature is enabled, the balance box will appear as white and therefore editable, so you can type your preferred payment amount. For these fees, you will be able to contribute throughout the year. The total amount will remain on display on the right hand side. They will continue to sit in your Action Centre as payable until the balance has been paid in full.



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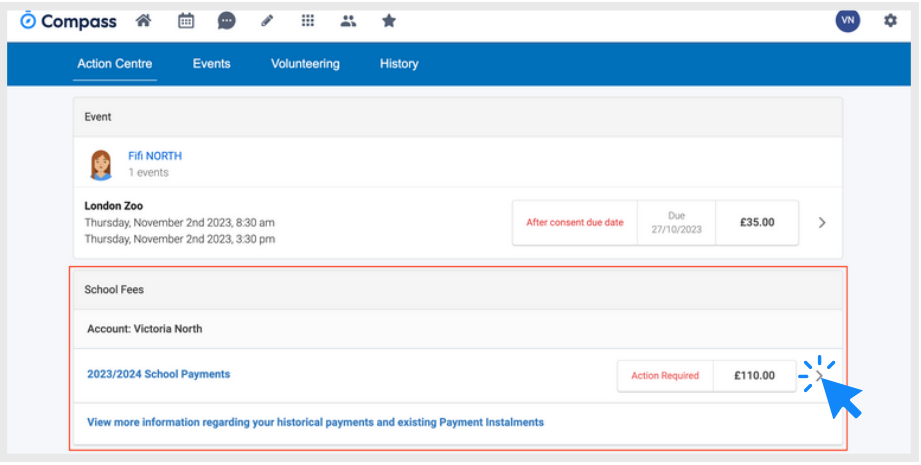
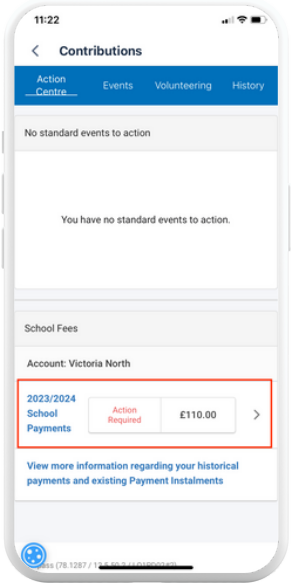
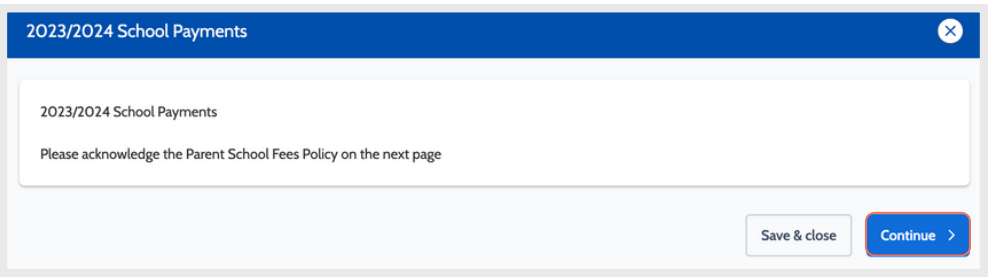
How To: Make Payments

1. In the Action Centre, click on the school fee that you wish to pay for.



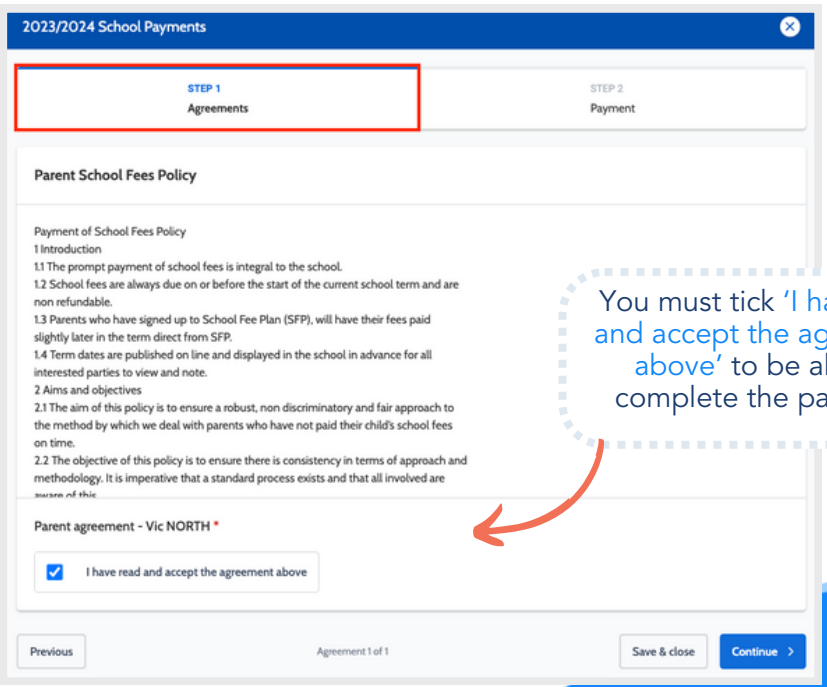


2. Click 'Continue' to proceed with the payment.

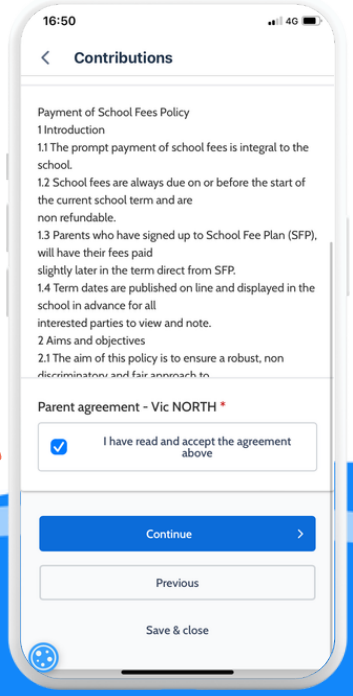


You will see an introductory message from the school which may contain instructions for making the payments or a description of the fees posted.

3. Read and acknowledge any Agreements added by the school and answer any questions (if applicable).



You must tick 'I have read and accept the agreement above' to be able to complete the payment.



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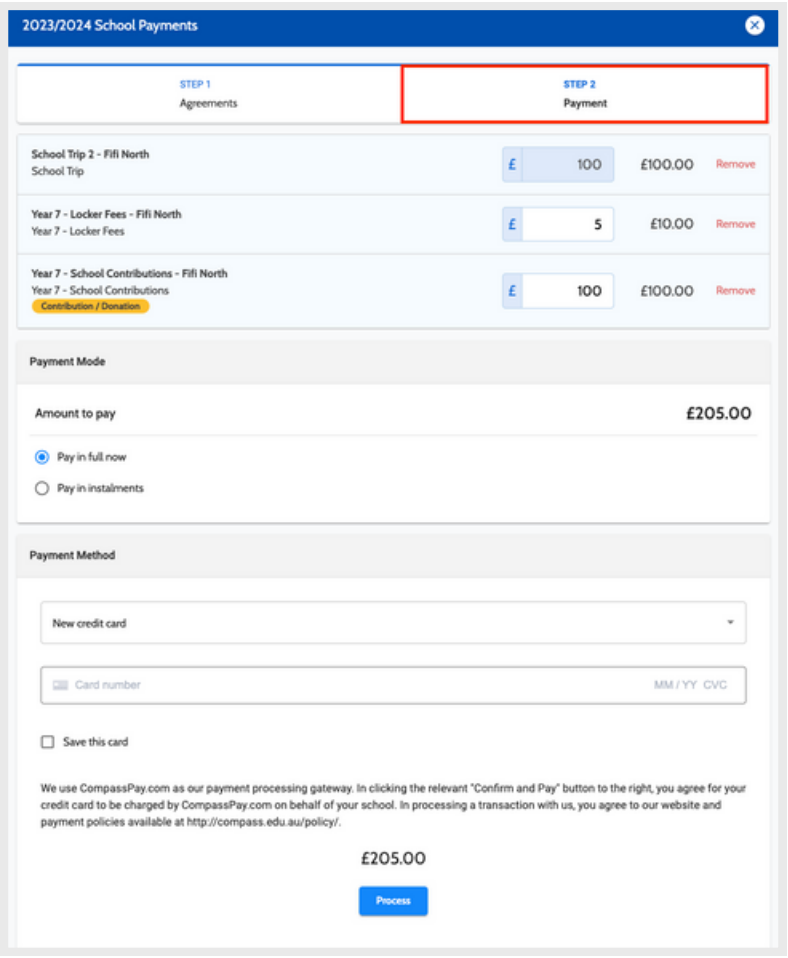
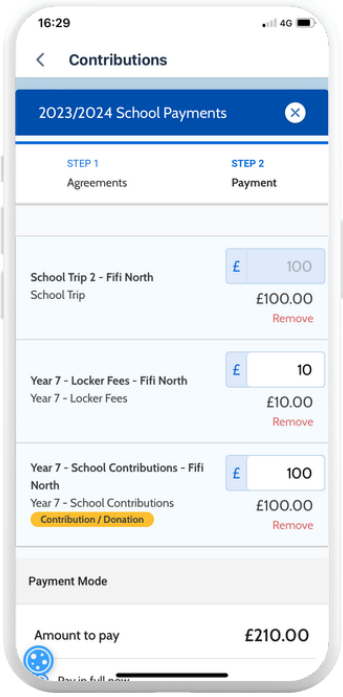
How To: Make Payments Continued

4. Select the amounts that you would like to pay for in this transaction.

If your school allows you to chip away at payments, type the amount you would like to pay *(for more info, see page 5)*. Alternatively, use the Remove button on the right hand side to remove a particular payment from the transaction.

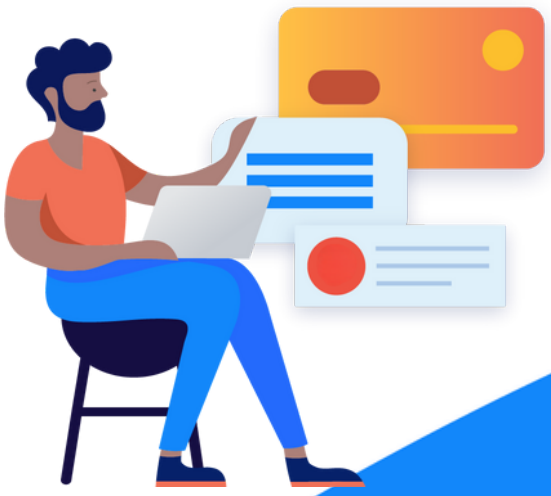


Choose whether to Pay in Full or Pay in Instalments *(for more info, see page 5)*



Enter your card details and toggle on 'Save this card' if you would like your details to be remembered for subsequent payments.

Select 'Process' to complete the transaction. Following this, you will receive an email confirmation of the payment containing a PDF receipt.



Reminder: If you have any questions, or would like to discuss paying different amounts for your contributions, please speak to your school office.

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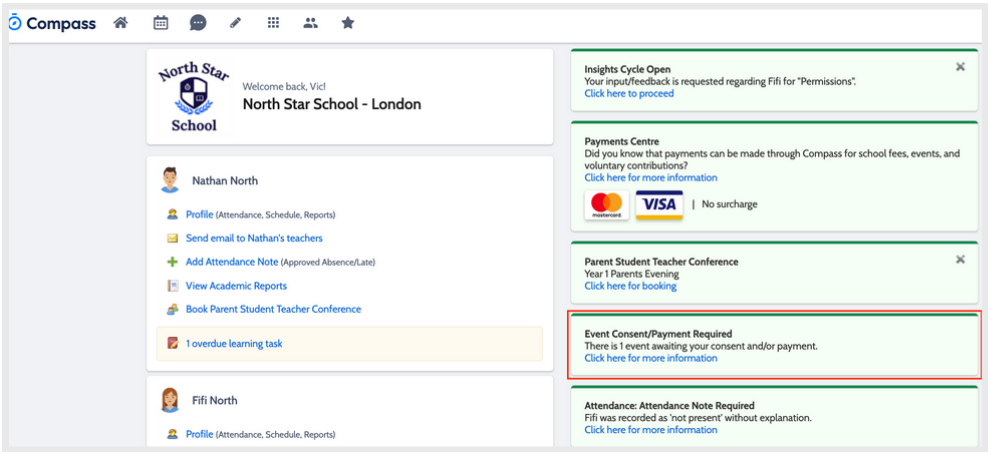
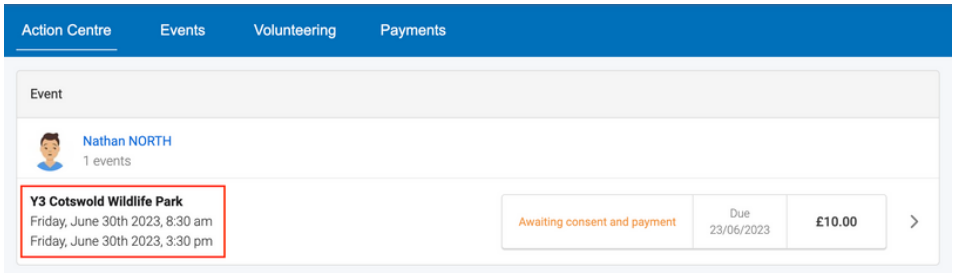
How To: Pay for School Trips

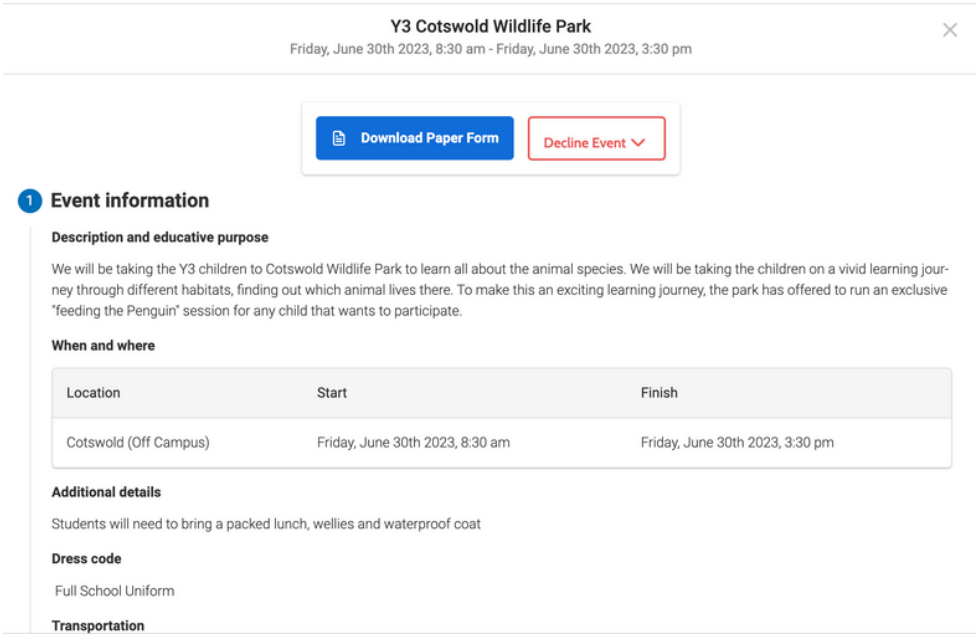


If your child has an upcoming event that requires your consent and/or payment, you will see an alert on your homescreen.

Click the alert and it will take you to the Events page (alternatively you can click the grid menu icon at the top of the screen and select 'Events').



In the 'Action Centre' tab, you will see any events requiring your attention. Select the event you wish to action.
If you have more than one student at the school, events will be listed here under each child.



Information

Here you will see the details of the event added by the school, including:

- Time and Location
- Additional details
- Dress Code
- Transportation

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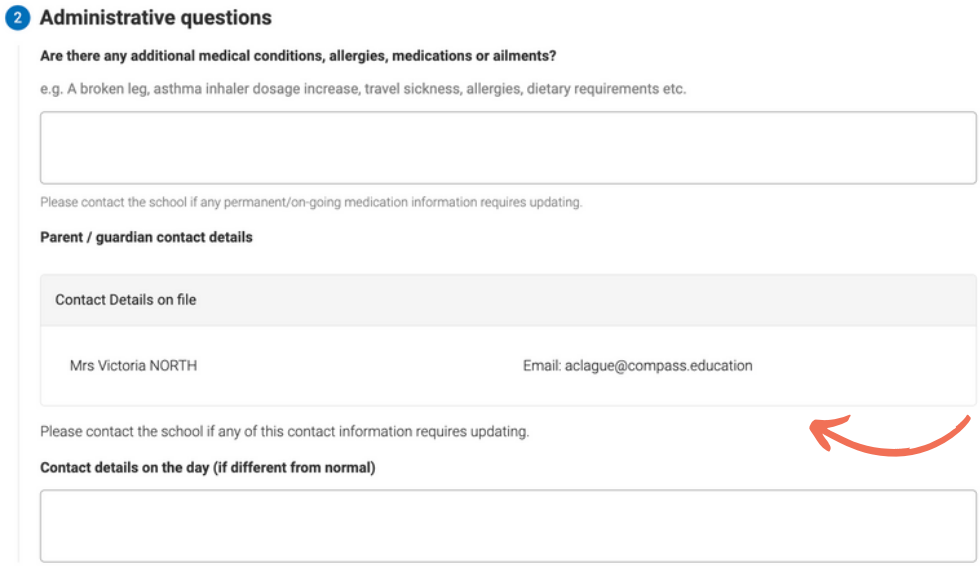
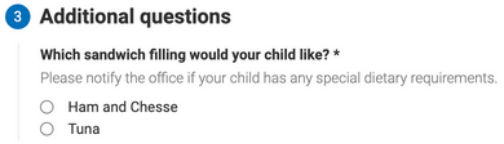
How To: Pay for School Trips Continued



Administrative Questions

If your child has medical conditions not listed, please add the details in the available section. If they do not have any additional medical conditions, you can leave this field blank.

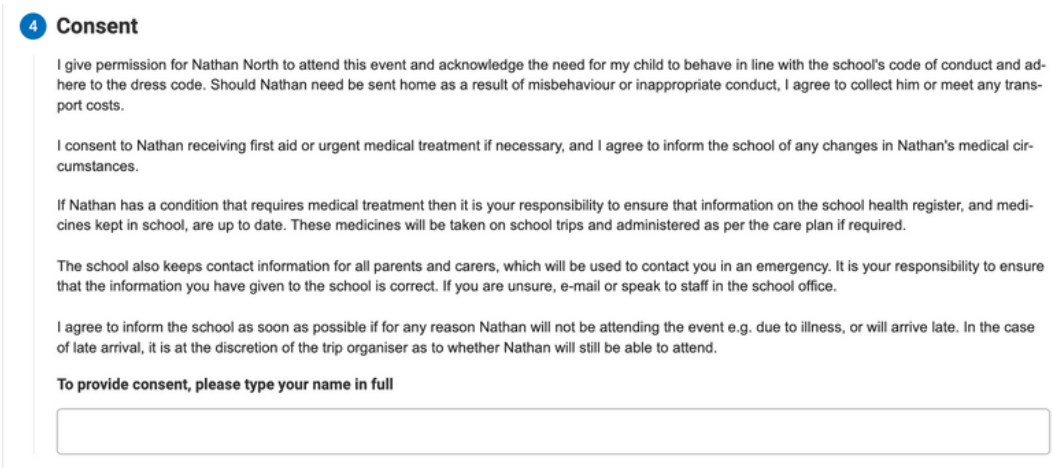
You will see the current contact details on file for any parents/guardians. To provide different contact information for the day, type in the space provided.



Additional Questions

Additional questions configured by the school will display here. The asterisk shows mandatory questions that must be completed in order to proceed.

If you are required to review a medical Action plan, you will need to tick the acknowledgement box to proceed (if the Action plan on file is no longer current, please advise the school office).



Consent

You will then be required to provide consent by typing your name in full in the box provided.

Note: Not all School Trips will require both Payment and Consent, it will vary on the type of Event set up by the school.

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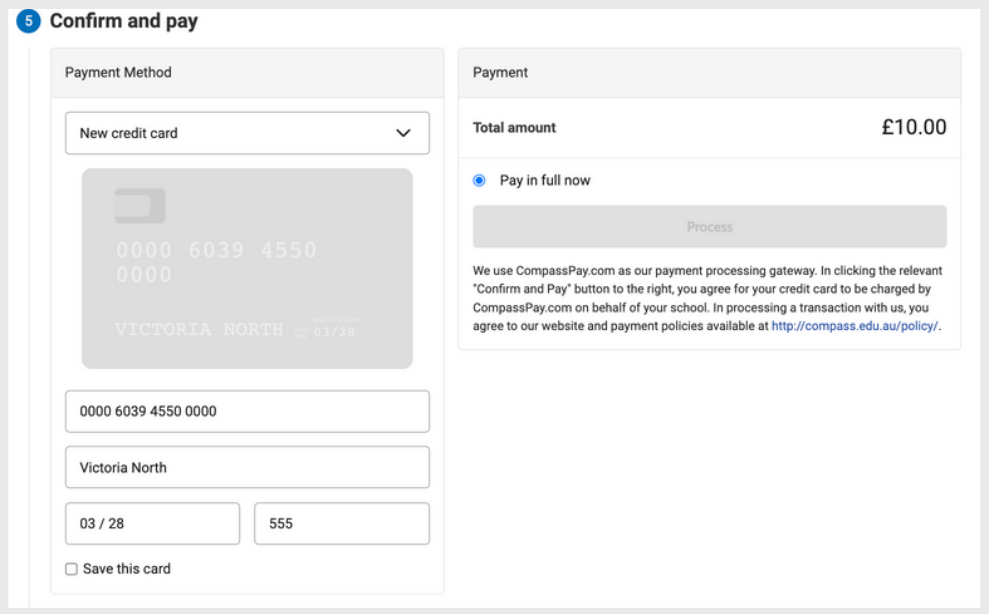
How To: Pay for School Trips Continued



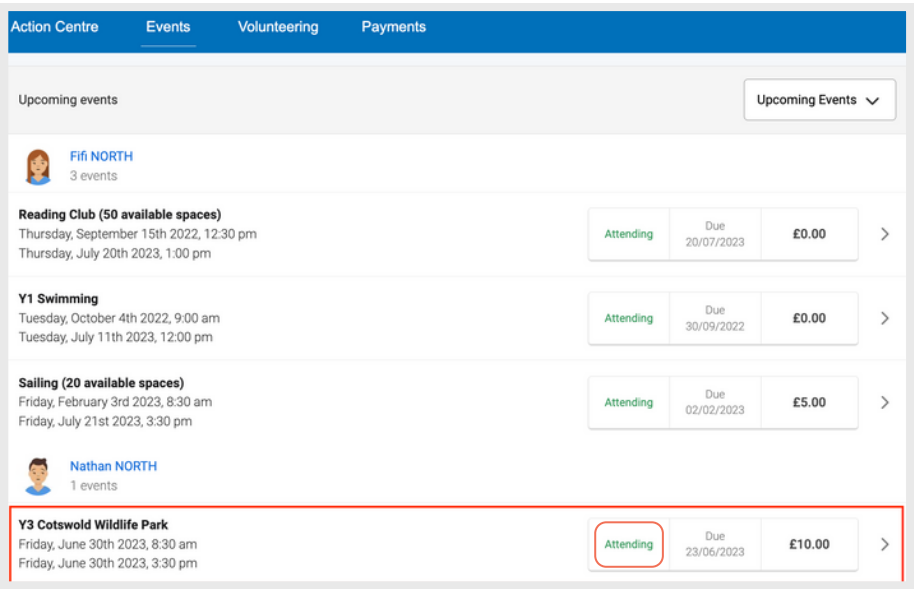
Confirm and Pay

Process a payment for the event by selecting a card on file or adding a new one. If you are adding a new card, you can tick 'Save this card' so that your card details are remembered for next time.

Select from the payment options available to you (ie pay in full / instalments) and click Process.

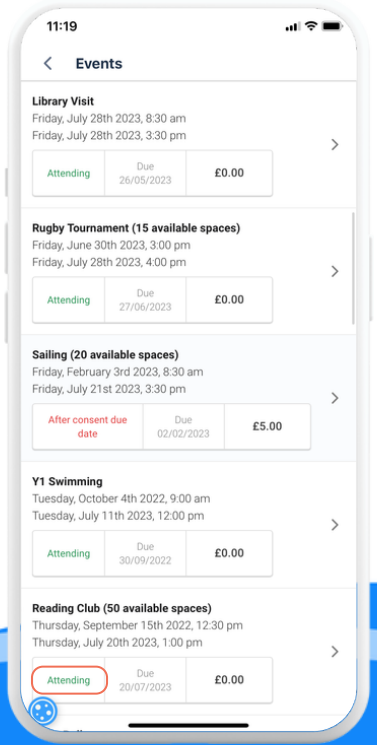
Manage School Trips

The 'Events' tab will show all events, both processed and those still requiring action. To access information on upcoming events that you have already consented and paid for, click the event.



Once you have given consent and paid for the trip, the Events tab will update to show your child as 'Attending'.

Reminder: Access the 'Events' module in the More Menu on the Compass App



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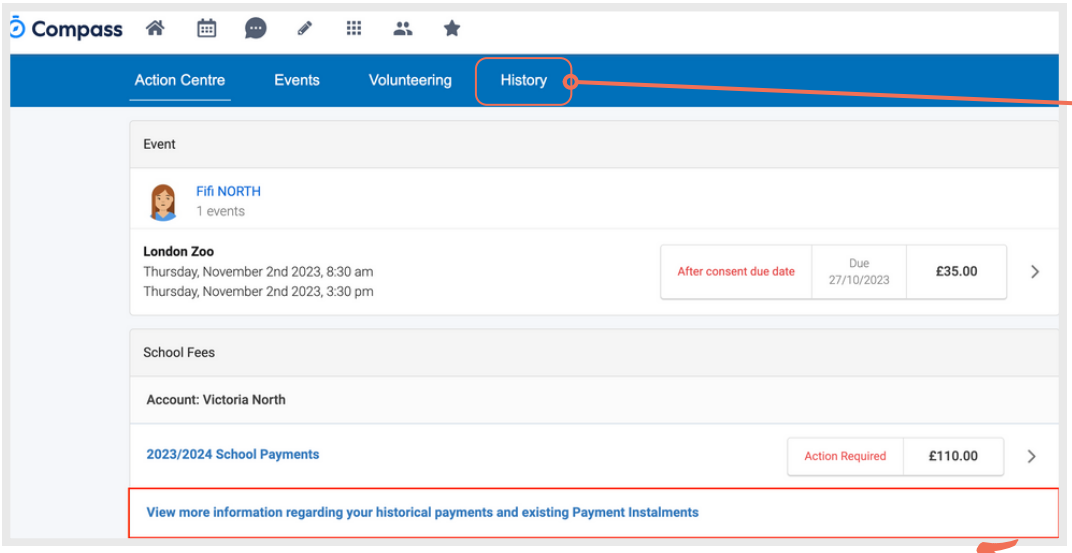
How To: Manage your Payments

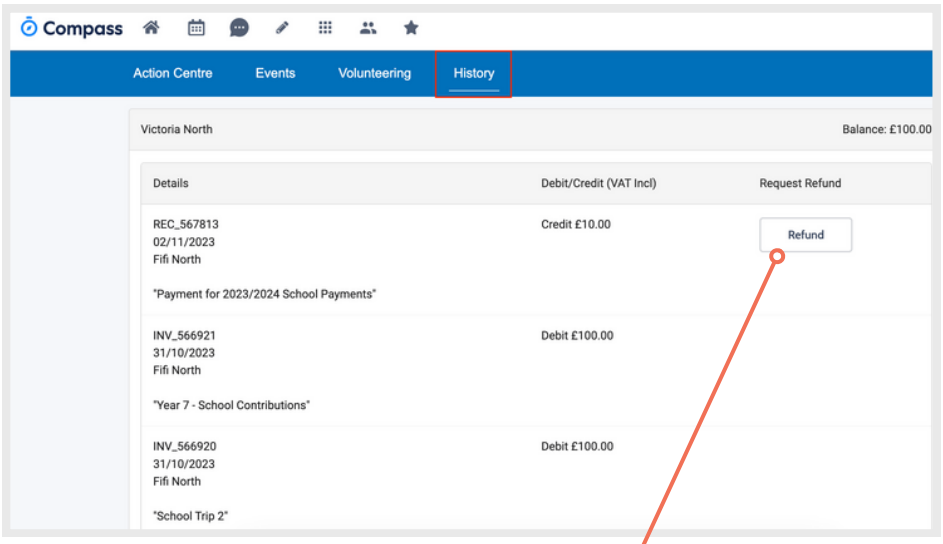
View Current Payments and History



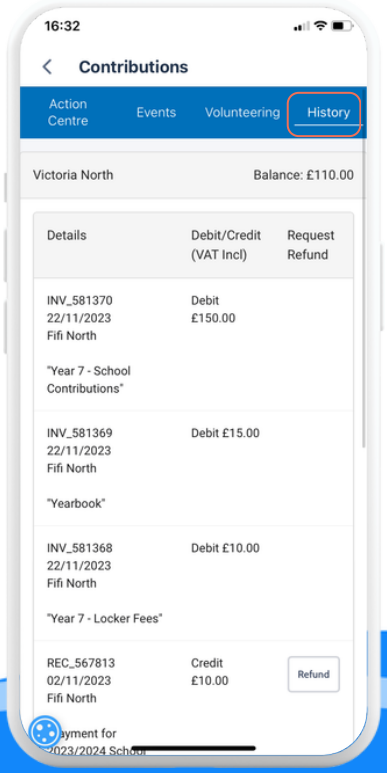
View your Payment History by clicking the History tab

Alternatively, follow the link at the bottom of the Action Centre tab.

In the History tab, you can view processed payments for items and payment plans transactions:



You can also request a refund from this tab
(for more info, see page 12)



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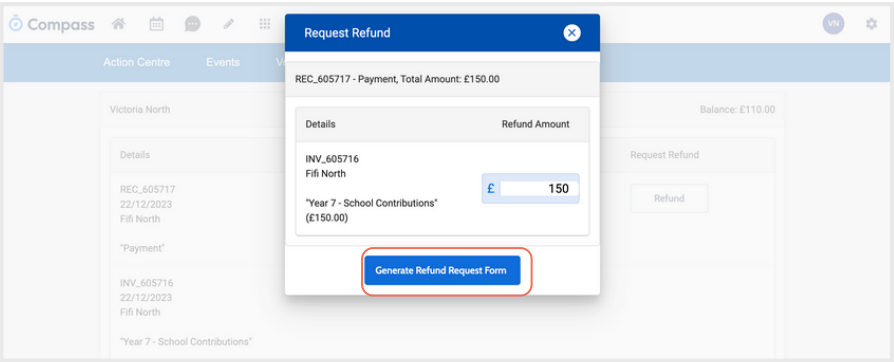
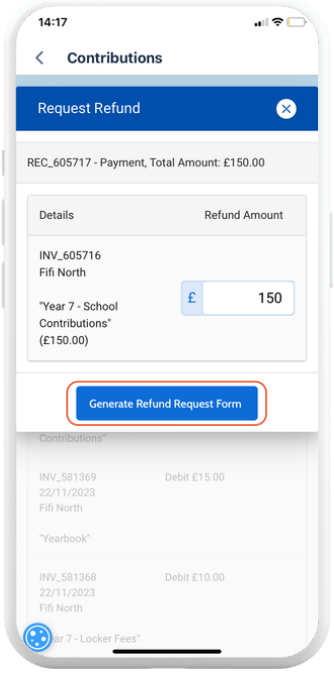
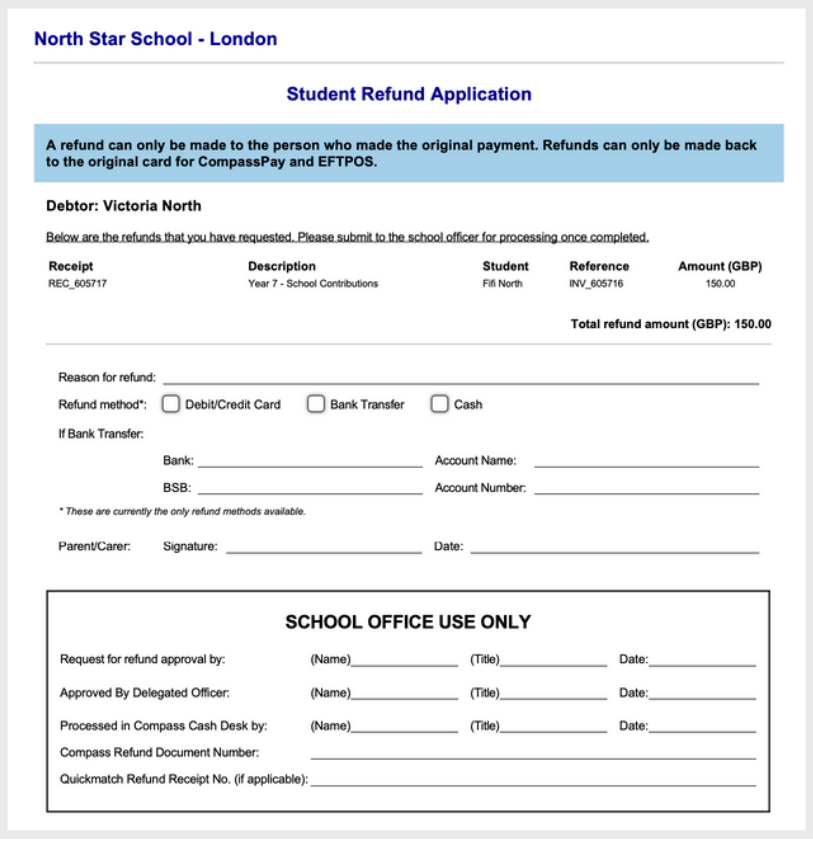
How To: Request a Refund

Generate Refund Request Form

Click the Refund button in the History tab to request a refund from the school. Select the appropriate refund amount and click 'Generate Refund Request Form'.







North Star School - London

Student Refund Application

A refund can only be made to the person who made the original payment. Refunds can only be made back to the original card for CompassPay and EFTPOS.

Debtor: Victoria North

Below are the refunds that you have requested. Please submit to the school officer for processing once completed.

Receipt	Description	Student	Reference	Amount (GBP)
REC_605717	Year 7 - School Contributions	Fifi North	INV_605716	150.00

Total refund amount (GBP): 150.00

Reason for refund: _____

Refund method*: ☐ Debit/Credit Card ☐ Bank Transfer ☐ Cash

If Bank Transfer:

Bank: _____ Account Name: _____

BSB: _____ Account Number: _____

** These are currently the only refund methods available.*

Parent/Carer: Signature: _____ Date: _____

SCHOOL OFFICE USE ONLY

Request for refund approval by: (Name)_____ (Title)_____ Date:_____

Approved By Delegated Officer: (Name)_____ (Title)_____ Date:_____

Processed in Compass Cash Desk by: (Name)_____ (Title)_____ Date:_____

Compass Refund Document Number: _____

Quickmatch Refund Receipt No. (if applicable): _____

Complete the Refund Request Form and return to the School Office.

Important: Refunds are processed at the school's discretion and can only be made to the person who made the original payment.

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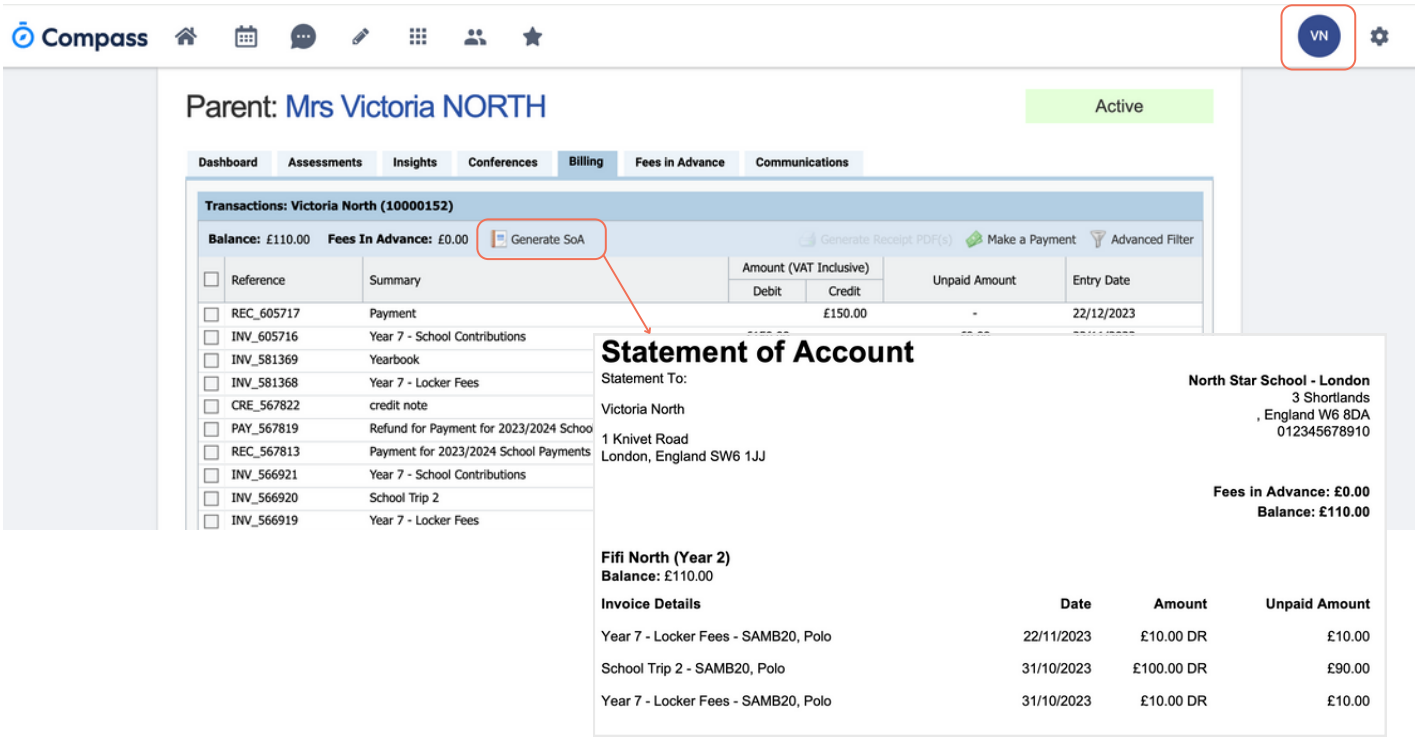
How To: Generate Receipts

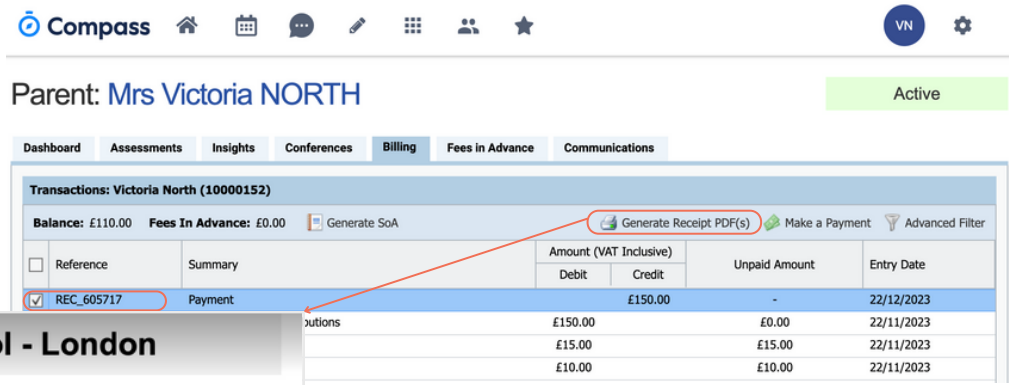
Generate a Statement of Account

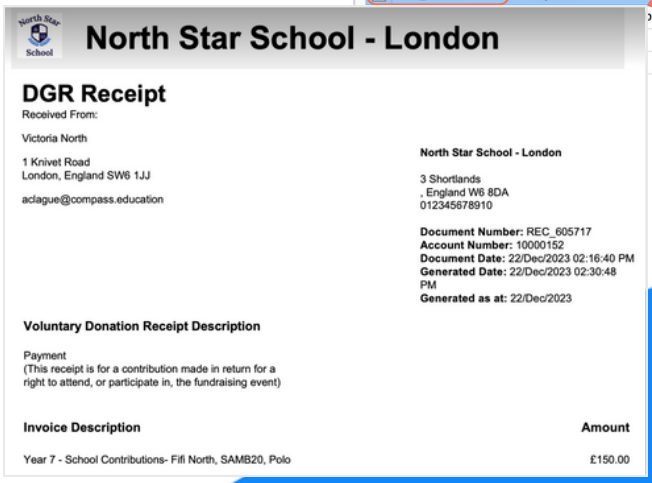
To generate a Statement of Account PDF, simply navigate to your parent account in the Web Browser. Click on your initials in the top right of your portal, and select the Billing tab. Select 'Generate SoA' to download a PDF.



Generate a Transaction Receipt

To generate a receipt, select the transaction using the checkbox on the left. Click 'Generate Receipt PDF(s)'.





Individual receipts will be emailed to you automatically after any payment has been made.

If you have any questions, please call 0114 697 7000 or email us at help@compass.education