



Exam Charges Guide

How to set up your exam fee structure and track payments



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Introduction

One of the administrative overheads of a Medal Test is managing the finances. Whether it is determining how much a candidate is charged for the particular test they are taking, or keeping track of who has paid or is still outstanding, MedalTest Organiser can help you make the most of the time available.

The system allows you to set up your table of exam fees for the full range of IDTA medals and awards. You can even choose separate rates for adults as opposed to juniors if you wish. You are then able to keep a complete track of the session finances.

If you are using the system to produce letters to candidates, the letters can incorporate the exam charges information telling the candidates what their exam fees are for the session.

This guide will cover the following:

- How to set up your exam fee structure
- How to print a table of fees
- How to make a periodic increase in charges
- How to produce reports of the exam session finances
- How to mark candidates exam payments

It is assumed that you are already familiar with the basic functions of the system as described in the Quick Start Guide.

Setting Your Fee Structure

The Exam Charges section of the system is where you are able to set up and manage your medal fees structure.

- Enter the Exam Charges system by clicking on the Exam Charges tab on the Main Menu at the top of the screen.



Cost Groups

You will be presented with a screen listing the different cost groups, as shown.

Cost Groupings

Print Historical Exam Fee List
Print Current Exam Fee List

Selections: [select all](#) | [unselect all](#) | locked [show 10](#) | [show 25](#) | [show 50](#) | show 100 (of 30)

Set Fees

Select	<u>Id</u>	<u>Description</u>
<input type="checkbox"/>	ROS	Rosette Awards
<input type="checkbox"/>	STD	Stardance Awards
<input type="checkbox"/>	SDA1	Social Dance Award 1
<input type="checkbox"/>	SDA2	Social Dance Award 2
<input type="checkbox"/>	SDA3	Social Dance Award 3
<input type="checkbox"/>	SDA4	Social Dance Award 4
<input type="checkbox"/>	1D	One Dance
<input type="checkbox"/>	B	Bronze
<input type="checkbox"/>	B2	Double Bronze
<input type="checkbox"/>	S	Silver

«FIRST <PREV (Page 1 2 3 of 3) NEXT> LAST»
RESET
CLOSE

The cost structure is built into groups to match the IDTA Ballroom Amateur Test Fees list that forms the basis of what you will typically charge your candidates.

For example, the cost group for Rosettes covers all forms of Rosettes: ballroom, freestyle and cheerleading. In this way you don't have lots of different prices to maintain as the same price covers them all.

Next, you will add the fees for each cost group.

- Select the cost group for which you want to enter amounts, e.g. Rosettes
- Click the *Set Fees* button (see previous picture)



Group Charges

Cost Group Rosette Awards

Set New Fee Search Show Current Charges Show Old Charges

Selections: [select all](#) | [unselect all](#) | locked show 10 | show 25 | show 50 | show 100 (of 0)

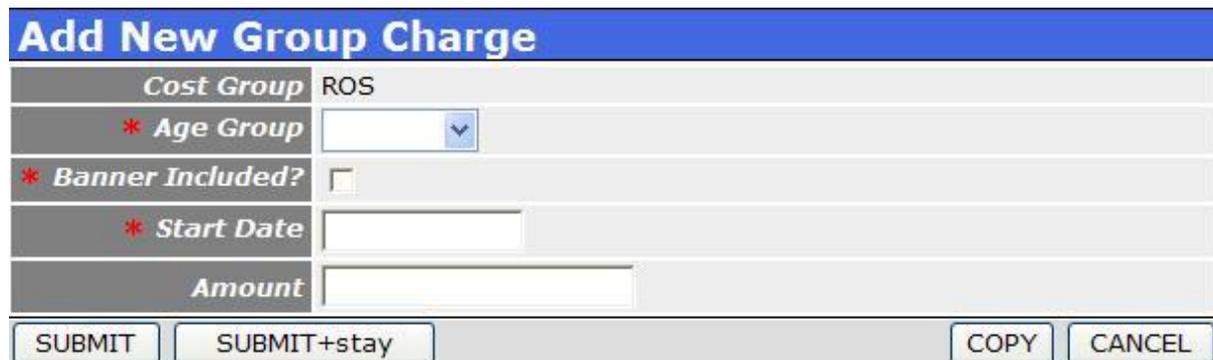
Show Delete

Select	Age Group	Banner	Start Date	Price	End Date
No entries found on COST_GROUP_CHARGE					
«FIRST <PREV (Page 0 of 0) NEXT> LAST»					

RESET CLOSE

If you have not previously set any fees for the cost group you will see the “No entries found” message as shown. Otherwise, any already existing fees will be listed on the Group Charges screen.

- Click the *Set New Fee* button



Add New Group Charge

Cost Group ROS

* *Age Group*

* *Banner Included?*

* *Start Date*

Amount

SUBMIT SUBMIT+stay COPY CANCEL

Age Groups

For each fee that you enter into the system you may enter it as a Junior fee only, Adult fee only, or All Ages fee.

In this way you may have a grade that is charged at two different rates for Juniors and Adults, or a single rate that is charged to everybody. You cannot mix an All Ages fee with one of the other groups at the same time. If you do this the system will cancel the oldest fee and tell you that it has done this.

- Select the Age Group you wish to apply for the cost group

Rosettes and Stardance Awards have two prices depending on whether or not a banner is required.

- Click the banner included field if the amount is for an award including a banner, otherwise leave blank

Start and End Dates

The system will keep a track of your pricing over time. Therefore, you need to tell the system from what date your pricing is effective. For example, you may set your fees to run from 1st September to 31st August the following year, at which time you may do a price increase (in line with IDTA pricing).

- Enter the Start Date (e.g. 01/09/2009)
- Enter the amount (numbers only – no £ sign)
- Click the *SUBMIT* button (or *SUBMIT+stay* if you are entering more amounts)

The new fee will be added to the system with a blank end date (meaning that the fee is current until a new fee replaces it in the future)

- Repeat these steps for each fee you require for the cost group

Remember to add fees with and without banners for Rosette and Stardance awards. Also remember that if you are using separate Adult and Junior fees you will need to add both fees for each cost group where applicable.

Group Charges					
Cost Group Bronze					
<input type="button" value="Set New Fee"/> <input type="button" value="Search"/> <input type="button" value="Show Current Charges"/> <input type="button" value="Show Old Charges"/>					
Selections: select all unselect all <input type="button" value="show 10"/> <input type="button" value="show 25"/> <input type="button" value="show 50"/> <input type="button" value="show 100 (of 2)"/>					
locked <input type="checkbox"/>					
<input type="button" value="Show"/> <input type="button" value="Delete"/>					
Select	Age Group	Banner	Start Date	Price	End Date
<input type="checkbox"/>	Adult	<input type="checkbox"/>	01 Sep 2008	11.50	
<input type="checkbox"/>	Junior	<input type="checkbox"/>	01 Sep 2008	11.00	
«FIRST <PREV (Page 1 of 1) NEXT> LAST»					
					<input type="button" value="RESET"/> <input type="button" value="CLOSE"/>

This screen shows separate Junior and Adult prices for Bronze medal effective from the 1st September 2008.

- To move to the next Cost Group, click the *CLOSE* button on the Group Charges screen. You can then select the next Cost Group to add your fees.

Printing a Fee List

The main Cost Groupings screen contains two buttons for printing Fee Lists

1. Print Historical Exam Fee List
2. Print Current Exam Fee List

Cost Groupings

Print Historical Exam Fee List
Print Current Exam Fee List

Selections: [select all](#) | [unselect all](#) | locked | [show 10](#) | [show 25](#) | [show 50](#) | show 100 (of 30)

Select	Id	Description
<input type="checkbox"/>	ROS	Rosette Awards
<input type="checkbox"/>	STD	Stardance Awards
<input type="checkbox"/>	SNA1	Social Dance Award 1

Use the Current Exam Fee List to produce a complete report of all fees that are current as at today's date. There will be a separate page per Age Group.



INTERNATIONAL DANCE TEACHERS' ASSOCIATION

The Test Dance Centre

Current Examination Fee List

Age Group: Junior

Grade	Amount
Rosette Awards (inc. banner)	60.00
Rosette Awards	92.00
Stardance Awards (inc. banner)	34.40
Stardance Awards	31.40
Social Dance Award 2	31.90
Social Dance Award 3	31.90
Social Dance Award 4	33.90
One Dance	32.40
Double Bronze	35.40
Double Silver	36.40
1st Gold Bar	24.00
2nd Gold Bar	37.40

- Review the list to check that all your fees are correct

To make updates, delete any fees that are incorrect and re-enter them as described earlier.

The Historical report shows all current and old fees with corresponding start and end dates.

Making Price Increases

Price Increases are done in EXACTLY the same way as you enter your initial fees. You will see your existing prices on each of the cost group screens, as in the example below for Bronze medal.

Group Charges					
<i>Cost Group</i> Bronze					
<input type="button" value="Set New Fee"/> <input type="button" value="Search"/> <input type="button" value="Show Current Charges"/> <input type="button" value="Show Old Charges"/>					
Selections: select all unselect all show 10 show 25 show 50 show 100 (of 2)					
locked <input type="checkbox"/>					
<input type="button" value="Show"/> <input type="button" value="Delete"/>					
Select	Age Group	Banner	Start Date	Price	End Date
<input type="checkbox"/>	Adult	<input type="checkbox"/>	01 Sep 2008	11.50	
<input type="checkbox"/>	Junior	<input type="checkbox"/>	01 Sep 2008	11.00	
«FIRST <PREV (Page 1 of 1) NEXT> LAST»					
<input type="button" value="RESET"/> <input type="button" value="CLOSE"/>					

- Click the *Set New Fee* button (as previously)

Add New Group Charge	
<i>Cost Group</i>	ROS
* <i>Age Group</i>	<input type="text" value=""/>
* <i>Banner Included?</i>	<input type="checkbox"/>
* <i>Start Date</i>	<input type="text" value=""/>
<i>Amount</i>	<input type="text" value=""/>
<input type="button" value="SUBMIT"/> <input type="button" value="SUBMIT+stay"/> <input type="button" value="COPY"/> <input type="button" value="CANCEL"/>	

- Select the age group and banner (as previously)
- Enter the Start Date of the new price (e.g. 01/09/2009)
- Enter the new amount
- Click the *SUBMIT* button (or *SUBMIT+stay* if you are entering more amounts)

The new amounts will be saved, and the end date on the old prices will be set automatically.

The following screen shows original prices for a Bronze medal that have been superseded following a price increase.

Group Charges					
Cost Group		Bronze			
<input type="button" value="Set New Fee"/>		<input type="button" value="Search"/>	<input type="button" value="Show Current Charges"/>	<input type="button" value="Show Old Charges"/>	
Selections: select all unselect all locked <input type="checkbox"/> show 10 show 25 show 50 show 100 (of 4)					
<input type="button" value="Show"/>		<input type="button" value="Delete"/>			
Select	Age Group [▲]	Banner	Start Date	Price	End Date
<input type="checkbox"/>	Adult	<input type="checkbox"/>	01 Sep 2008	11.50	31 Aug 2009
<input type="checkbox"/>	Adult	<input type="checkbox"/>	01 Sep 2009	12.50	
<input type="checkbox"/>	Junior	<input type="checkbox"/>	01 Sep 2008	11.00	31 Aug 2009
<input type="checkbox"/>	Junior	<input type="checkbox"/>	01 Sep 2009	12.00	

This shows that the amounts have been increased starting from 1st September 2009 and the old prices ended on 31st August 2009, for both Adults and Juniors.

When determining which prices to use for your medal test session the system matches the session date against the start and end dates of the fees. So, in the example above, an Adult Bronze would be charged at £11.50 for an exam session on or before 31st August 2009, but £12.50 for any exam session on or after 1st September 2009.

When you are making price updates, the system will validate the dates you are entering to ensure you do not cause any overlaps that may invalidate your pricing. For example, it would not be correct to enter a new date EARLIER than your current price. If the system detects a problem with the dates you are entering, it will stop you with an appropriate message.

Tracking Candidate Payments

Providing you have set up your exam fee structure, MedalTest Organiser has a built in feature to enable you to track candidate payments, and produce a useful report of outstanding amounts, or a report of payments made by date.

➡ Click the *Manage Payments* button

List of Tests by Exam Session

Session: 10 Jul 2009
 Examiner: N/A

Selections: [select all](#) | [unselect all](#) | locked
 show 10 | show 25 | show 50 | show 100 (of 6)

Select	Branch	Grade	Candidate	Dance 1	Dance 2	Dance 3	Dance 4
<input type="checkbox"/>	Ballroom	B	Dot Apostrophe	Waltz	Quickstep		
<input type="checkbox"/>	Ballroom	B	Lucille Ball	Waltz	Quickstep		
<input type="checkbox"/>	Ballroom	B	Charlie Chaplin	Waltz	Quickstep		

You will now see the Manage Exam Payments screen.

This screen lists all the candidate exams, in candidate Surname order. The amount owing for each exam is shown (providing the fee list has been set up). Each exam also has a tick box to mark whether or not the payment has been received from the candidate.

Manage Exam Payments

Session: 01 May 2009
 Examiner: Mr Strict Marker

show 10 | show 25 | show 50 | show 100 (of 24)

Branch	Grade	First Name	Surname	Amount	Paid?	Date
Freestyle Solo	2nd Gold Bar	Julie	Andrews	37.49	<input type="checkbox"/>	
All Round Efficiency	Star 5	Dot	Apostrophe	42.99	<input type="checkbox"/>	
Argentine Tango	Star 5	Dot	Apostrophe	42.99	<input type="checkbox"/>	
Freestyle Solo	Gold	Fred	Astaire	25.00	<input type="checkbox"/>	
Freestyle Solo	1st Gold Bar	Fred	Astaire	28.00	<input type="checkbox"/>	
Freestyle Solo	Gold	Ann	Boleyn	25.00	<input type="checkbox"/>	
Ballroom	One Dance	Robert	Bruce	14.00	<input type="checkbox"/>	
Bossa Nova	Silver	Robert	Bruce	25.00	<input type="checkbox"/>	
Ballroom	Star 2	Rose	Bush	36.99	<input type="checkbox"/>	
Freestyle Solo	Presidents Award 1	Charlie	Chaplin	43.99	<input type="checkbox"/>	

Receiving Payments

To mark a payment as 'received' from a candidate simply tick the box next to the appropriate payment and click the *SUBMIT* button. You may tick several payments at the same time, but always click the *SUBMIT* button BEFORE moving on to another page. All the exams that you have marked as paid will now show today's date against the payment.

Manage Exam Payments						
<i>Session</i>		01 May 2009				
<i>Examiner</i>		Mr Strict Marker				
Search	Print Outstanding List	Print Payment Report				
show 10 show 25 show 50 show 100 (of 24)						
Branch	Grade	First Name	Surname [^]	Amount	Paid?	Date
Freestyle Solo	2nd Gold Bar	Julie	Andrews	37.49	<input type="checkbox"/>	
All Round Efficiency	Star 5	Dot	Apostrophe	42.99	<input checked="" type="checkbox"/>	12 May 2009
Argentine Tango	Star 5	Dot	Apostrophe	42.99	<input checked="" type="checkbox"/>	12 May 2009
Freestyle Solo	Gold	Fred	Astaire	25.00	<input type="checkbox"/>	
Freestyle Solo	1st Gold Bar	Fred	Astaire	28.00	<input type="checkbox"/>	
Freestyle Solo	Gold	Ann	Boleyn	25.00	<input type="checkbox"/>	
Ballroom	One Dance	Robert	Bruce	14.00	<input checked="" type="checkbox"/>	12 May 2009
Bossa Nova	Silver	Robert	Bruce	25.00	<input checked="" type="checkbox"/>	12 May 2009
Ballroom	Star 2	Rose	Bush	36.99	<input type="checkbox"/>	
Freestyle Solo	Presidents Award 1	Charlie	Chaplin	43.99	<input type="checkbox"/>	

Outstanding Payments Report

You can produce an 'at a glance' report of all candidates who have not yet paid their exam fee(s). Click the *Print Outstanding List* button at the top of the Manage Exam Payments screen.

 INTERNATIONAL DANCE TEACHERS' ASSOCIATION The Test Dance Centre Outstanding Payments Report					
Exam Session:		01 May 2009			
First Name	Surname	Branch	Grade	Amount	Paid
Julie	Andrews	Freestyle Solo	2nd Gold Bar	37.49	
Fred	Astaire	Freestyle Solo	1st Gold Bar	28.00	
Fred	Astaire	Freestyle Solo	Gold	25.00	
Ann	Boleyn	Freestyle Solo	Gold	25.00	
Rose	Bush	Ballroom	Star 2	36.99	
Charlie	Chaplin	Freestyle Solo	Presidents Award 2	43.99	
Charlie	Chaplin	Freestyle Solo	Presidents Award 1	43.99	
Charlie	Chaplin	Latin	Presidents Award 3	43.99	
Charlie	Chaplin	Rock and Roll	1st Gold Bar	28.00	

This report is also produced in Surname order, to match the screen. The report can be printed and used as a basis to receive payments from your candidates at your school. There is a 'Paid' column at the end which you can tick as you receive payments from your candidates. You can then use the report as a reference when later updating the system to record the payments received. Each time you print this report, any candidates who have been marked as paid since the last report will not appear.

Payments Received Report

You can produce a report of all payments received from candidates to use as a balancing checklist. Click the *Print Payment Report* button at the top of the Manage Exam Payments screen.

 INTERNATIONAL DANCE TEACHERS' ASSOCIATION The Test Dance Centre Received Payments Report				
Exam Session: 01 May 2009				
Paid Date	Candidate	Branch	Grade	Amount
10 May 2009	Ken Hom	Freestyle Solo	Presidents Award 3	42.49
10 May 2009	Holly Ivy	Freestyle Solo	1st Gold Bar	24.00
10 May 2009	Beryl The Peryl	Ballroom	Presidents Award 2	43.99
			Total Received for 10 May 2009:	110.48
12 May 2009	Dot Apostrophe	All Round Efficiency	Star 5	42.99
12 May 2009	Dot Apostrophe	Argentine Tango	Star 5	42.99
12 May 2009	Robert Bruce	Ballroom	One Dance	14.00
12 May 2009	Robert Bruce	Bossa Nova	Silver	25.00
			Total Received for 12 May 2009:	124.98
			Total amount received:	235.46

This report details all of the payments received to date and gives a sub total for each date, and a grand total at the end of the report