

OSP: Creating Variable Payments and Obligations (Summary)

Table of Contents

Why Use Summary Obligations?.....	1
Creating a Summary Obligation	1
How Parents Pay for an Obligation.....	3
Generating an Obligation Payments Report.....	4
Deleting Summary Obligations.....	5

Why Use Summary Obligations?

Summary Obligations allow you to set up a variable payment option for parents where they choose how much to pay for an item, such as a damaged locker or lost library book. Summary Obligations can also be used for donations when you want the purchaser to choose how much they wish to pay and/or contribute to your school.

Setting up Summary Obligations is similar to setting up an Activity, but the obligation never goes “offline” for sale, Remember that an Activity has specific start and end sale dates. Summary Obligations also have no set price since these are overall categories which will always have different payment amounts, such as donations for a Band Trip or student obligation for a lost library book. When deposits are distributed by OSP to your bank account, they are also associated with a specific Fund Account.

Once the Summary Obligation has been created, it is available immediately on the parent site. Since there are no dates for an Obligation to go online or offline for sale, the Obligation Type always appears on the parent site unless you choose to delete it.

Reports such as the Summary Obligations Payment report allow you to review which student obligations have had payments made against them. You can also download this report into Excel format and customize and sort the data for your own records.

Creating a Summary Obligation

1. Select Setup | Student Oblig Setup the main menu.

Student Obligation Setup screen appears. Any existing Summary Obligations are also displayed.

OSP: Student Obligations and Variable Payments

Obligation Type	Obligation ID	Email ID		
Student Obligation(s)Donation of West Beverly Hills HS	ZZ101-OBLIG1	support@osmsinc.com	Edit	Delete
Student Obligation(s)Child Care of West Beverly Hills HS	ZZ101-OBLIG2	support@osmsinc.com	Edit	Delete
Student Obligation(s)Band Fundraiser of West Beverly Hills HS	ZZ101-OBLIG3	support@osmsinc.com	Edit	Delete
Student Obligation(s)Lost Textbooks of West Beverly Hills HS	ZZ101-OBLIG4	support@osmsinc.com	Edit	Delete
Student Obligation(s)Property Damage of West Beverly Hills HS	ZZ101-OBLIG5	support@osmsinc.com	Edit	Delete
Student Obligation(s)Football Booster of West Beverly Hills HS	ZZ101-OBLIG6	cary.grant@osmsinc.com	Edit	Delete
Student Obligation(s)Cafeteria Payment of West Beverly Hills HS	ZZ101-OBLIG7	cary.grant@osmsinc.com	Edit	Delete
Student Obligation(s)West Beverly Hills High After Care of West Beverly Hills HS	ZZ101-OBLIG8	sandra.bullock@osmsinc.com	Edit	Delete

2. Choose the Add New Obligation link.
The Student Oblig Setup menu appears. The Obligation Type ID is automatically created by OSP for you.

Obligation Type ID: ZZ101-OBLIG9

Obligation Type Description: [Empty]

Search Sponsor: [Empty]

Sponsor Email Address: [Empty]

Sponsor Last Name: [Empty]

Sponsor First Name: [Empty]

Search Fund Account: [Empty]

Fund Account: [Empty]

Fund Account Description: [Empty]

[Update](#) [Cancel](#)

3. Enter the name of the Summary Obligation, such as Lost Library Book in the Obligation Type Description field.
4. Enter the Teacher/Sponsor's information in the Sponsor fields.
5. Enter the Fund Account number where the funds will be deposited or choose from an existing Fund Account.
6. Press the Update link to add this Student Obligation to your school's list of Obligations.
The new Student Obligation now appears on the OSP Student Obligation list.

The Student Obligation Type is now available for parents to pay against an obligation.

How Parents Pay for an Obligation

1. The parent logs into your school district's OSP site. If this is a new parent account, they also have to add the student to their profile to be able to pay for an Obligation.
2. They select the Pay Obligations option along the menu bar.



The Summary Obligation Payment screen appears.

3. They choose the student from the Select Student Profile dropdown list box.
4. They select the school the student attends so that funds are sent to the correct school.
5. They choose the Obligation Type (which you have already set up).
6. They choose how much to pay in the Amount to Pay field.

OSP: Student Obligations and Variable Payments

7. They should also provide some information about the payment and what it is to be applied to in the Describe Obligation field.
8. Once all of the information has been completed, they should press Add to Cart to add this Obligation to their shopping cart.

The Student Obligation now appears in their shopping cart.

Next Steps

Parents can proceed with purchasing additional activities at this school or they can now check out. The Check Out process is the same as the Activity Check Out process. Parents can also make additional Obligation payments or Activity purchases and add them to this shopping cart.

Note: All items in the shopping cart should be for the same school.

Generating an Obligation Payments Report

The Summary Obligations Payments report allows you to see which students have paid for obligations within a date range. It also includes the first and last name of the Purchaser as well as the obligation amount paid and the information which was entered into the Description field. The report is organized by student ID. The report also gives a total amount of funds collected for that date range at the bottom of the report.

As with all OSP reports, remember that you can always export the report to an Excel .xls file on your computer and sort the data to fit your requirements.

1. Select Reports | Summary Obligations Payment from the main menu.

The Summary Obligations Payment screen appears.



SummaryObligationsPayment

Beginning Payment Date  31 Calendar

Ending Payment Date  31 Calendar

Include Previously Exported Payments?

1. Enter the start date for this report in the Beginning Payment Date field.
2. Enter the last date for this report in the Ending Payment Date field.

3. Select the magnifying glass icon to start the report generations.

The OSP Summary Obligations report appears with the date range you specified.

Return To Previous Page

Printed: 05/23/2013 8:59 am
Begin Date: 1-May-13 End Date: 22-May-13

Student ID	Orderid	Pur Last Name	PurFirst Name	Student Last Name	First Name	Pay Date	Amount	Description
10000009	r23028b1-943 7-4386-901d-d 351119e005c	Hartnett	Beth	McIntyre	Jasmine	05/14/2013	\$25	13 Steps
	3a72ad0c-33d 5-4d6a-3200-4 1f0a9e0f41f	Hartnett	Beth	McIntyre	Jasmine	05/14/2013	\$25	remaining payment for 13 Steps
9142993458	ab558b01-58e f-4eac-c8a1-3 41001970459	Hartnett	Beth	Hartnett	Mary	05/14/2013	\$100	New playground
9142998047	8e9ebb33-ba8 1-483f-af11-00 1002f05eaae	Hartnett	Beth	Hartnett	Cate	05/17/2013	\$100	New playground
	e28e80b1-e18 f-4728-bf24-3 e8355fba58f	Hartnett	Beth	Hartnett	Cate	05/20/2013	\$12	Fablehaven, Lost Book.
Total Amount Collected:							\$262	

Deleting Summary Obligations

Once a Summary Obligation has been created, it always appears on the parent site when they choose to pay obligations for a student since there are no dates for an obligation to go online and offline for sale. The only way to hide an obligation from the parent site, is to delete the obligation.

1. Select the Setup | Student Oblig Setup option from your school district's OSP Portal.

The OSP Student Obligation list appears with the current Student Obligations available for your school.

2. Select the Delete option on the right side of the Obligation Type that you want to remove.

OSP displays a message asking if you want to delete this Obligation.



3. Press OK to continue and to delete this Obligation.

OSP: Student Obligations and Variable Payments

OSP deletes this Obligation from your list of available obligations and it is no longer available for parents to make Obligation Payments.