Taking a Payment

There are various ways to take a payment.

From the Requirement Detail screen:

If you have just assessed a fee and are currently on the Requirement Detail page, the fastest way to take a payment is to simply click on the **Options** button at the bottom of that page.

- Requirement transactions	☐ Descending	**Top**		Options
Date	**Type**	**Number**	**Memo**	**Amount**
10/1/2017 9:53:44 AM	Assessment		JP Cases $196 after 7/1/17	$196.00

A box will appear with your options. You can click the **Take a Payment** link. This brings you to the Payment Detail screen.

Add a transaction
Assess fees
Take a Payment
Waive Fees
Adjustments
General journal entry
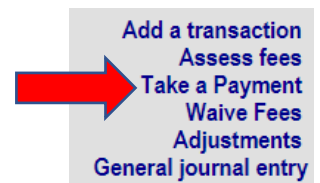
From the case Requirements link:

Once inside the Case Detail screen, you can click on the **Requirements** link. If there are multiple parties on the case, you will need to select the person whose requirements you wish to view. This will take you to the Payment Detail screen.

- Requirements					Options
Name	**Assigned**	**Requirement**	**Start**	**Status**	**Status date**
Greg Brady	10/18/2018	Refund/Transfer	10/18/2018	Paid in full	10/18/2018
Greg Brady	10/11/2018	Bond	10/11/2018	Paid in full	10/11/2018
Greg Brady	10/9/2018	Court Costs	10/9/2018	Paid in full	10/9/2018
Carol Brady	11/5/2018	Sheriff Service Process Fee	11/5/2018 1 day	(Balance: $28.00)	

From the Menu | Case | Requirements screen:

If a person comes to your desk to make a payment on an existing fee, the fastest way to take a payment is to do a name search and find the person. From the Person Detail screen, click **Menu | Case | Requirements**. This brings up the List Requirement screen which shows all fees owed. You can select fees for a specific case or leave it on select to show all cases. Click SUBMIT to see the results, if you change anything above the **Submit** button.

Click the **Take a Payment** button to get into the Payment Detail screen.

List Requirements
Marsha Brady (File# 6)

Case: -- Select --   ☑ Show names/cases
☑ Show details   ☑ Financial view
☑ Assessments   ☑ Payments   ☑ Other Transactions

⟳ Submit

- Requirements

Assigned date	Seq	Requirement type	Default payee	Status	Status date
Add a new requirement					
10/1/2016		Judgment	Gottlieb, Bill	Judgment (Balance: $5,367.12)	10/1/2016

Marsha Brady (6; Case: 1; Unassigned)

Name	Assess	Payments	Adjustments	Other	Due
Judgments	$5,367.12	$0.00	$0.00	$0.00	$5,367.12

Notes Attorney Fees
8% interest starting 11/1/17

✖ Cancel   🗎 Refresh   🔍 Lookup   Take a Payment   Waive Fees   Adjustment

From this screen you are able to view all fee requirements, even if they are not collected by your department. However, when you click the **Take a Payment** button, only those fees you are authorized to collect are displayed.

The Payment Detail screen

Once you have reached the Payment Detail screen you are ready to take a payment.

Payment Detail

This is a new entry.

Date: 11/5/2018 12:38:21 pm

Total Amount Due: $28.00

Tendered: $30.00

Amount paid:* $28.00

Change due: $2.00

Payment method: CASH - Cash ▼   Credit card fee: 0.00

Received from: Carol Brady

Address: 427 W. Main Street
Fort Wayne, IN 46802

🔍 Lookup

Transaction number:

Memo: Put check number if there is one here

Reference number:

Case	Seq	Requirement	Current due	Payment type	Amount
Carol Brady (48; Case: 1; 02D07-1810-JP-000002)	07	Sheriff Service Process Fee Due	$28.00	PAY - Pay Sheriff Service Process Fee ▼	$28.00

- **Date** - Put in the date or leave it empty. Leaving it empty puts in the current date and time.

- **Total Amount Due** - Shows you the total amount due that you are authorized to collect.

- **Tendered** - In this example the person owed $28.00 but tendered $30.00 which made the change due of $2.00 to be computed. This is not a required field and if they are paying the exact amount, you can skip it.

- **Amount paid** - The amount the person intends to pay toward fees today.

- **Change Due** - The change owed to them in the event they tendered more than they are paying.

- **Payment Method** - Select the appropriate payment method from the drop-down choices.

- **Credit card fee** - N/A

- **Received from** - You can type the name of the person paying the fee or you can click the **Lookup** button. If you click the **Lookup** button it will display a list of all names associated with the case, all names assigned to the case, and all relatives. You can click on the person paying the fee. This will also add that person's address to the receipt.

- **Transaction number** - Leave empty, this will automatically update with the receipt number.

- **Memo** - You can enter a memo if desired, or leave empty and it will default to the words "payment made". In Allen County, they want the check number in the memo line.

- **Reference number** - If person is paying with check or money order, you could enter the number of that instrument here.

==Make sure the money is being applied to the fees you wish it applied to.==

It is possible there are other fees than the one the person is intending to pay. The system will disburse the payment to the first fee. Just ensure the money is being applied to the fee you wish it to be applied to.

In this example the parent wants to pay the Sheriff Service Process Fee, but there is also a Non-Sufficient Funds Fee due. Since it is listed first, the $28.00 is automatically applied to it.

If you want to move that money to the Sheriff Service Process Fee, you must remove it from the NSF Fee and put it on the Sheriff Service fee.

Date:	11/5/2018 12:49:02 pm
Total Amount Due:	$66.00
Tendered:	$28.00
Amount paid:*	$28.00
Change due:	$0.00
Payment method:	CASH - Cash ▼ Credit card fee: 0.00
Received from:	Carol Brady
Address:	427 W. Main Street Fort Wayne, IN 46802
Transaction number:	
Memo:	
Reference number:	

Case	Seq	Requirement	Current due	Payment type	Amount
Carol Brady (48; Case: 1; 02D07-1810-JP-000002)	01	NSF Fee Due	$38.00	PAY - Pay NSF Fee ▼	$28.00 ←
Carol Brady (48; Case: 1; 02D07-1810-JP-000002)	07	Sheriff Service Process Fee Due	$28.00	-- Select -- ▼	

Delete it from the wrong fee and add it to the correct fee. If you see there are multiple fees from the beginning and the parent is wanting to put the money on a specific fee, you can come straight to the bottom and put the money where you want it to be applied and you won't have to delete.

Case	Seq	Requirement	Current due	Payment type	Amount
Carol Brady (48; Case: 1; 02D07-1810-JP-000002)	01	NSF Fee Due	$38.00	-- Select -- ▼	
Carol Brady (48; Case: 1; 02D07-1810-JP-000002)	07	Sheriff Service Process Fee Due	$28.00	PAY - Pay Sheriff Service Process Fee ▼	$28.00 ←

Click the **Update** button to save your work.

View & Print Receipt

Once you have received the Updates completed successfully prompt, you can click the **View receipt** button.
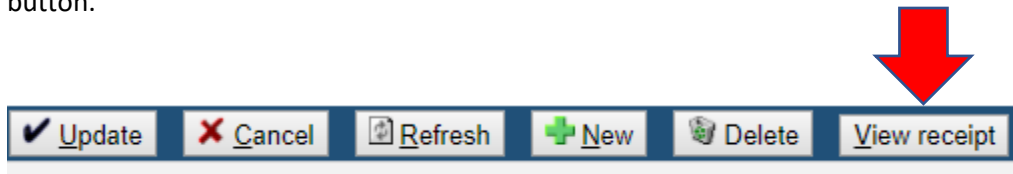
You can right click anywhere on the screen to see the Print button. Quest will print to whatever windows printer you have selected.

Once you have printed the receipt, you can click the **Cancel** button to get out of the receipt. This will take you back to the Payment Detail window. You can **Cancel** out of that to return to the Requirement Detail screen. You can **Cancel** out of that to return to the Case Detail screen.

OR… you can simply go to the **Menu** button and do whatever it is you need to do next. It is not necessary to cancel out of any screens before starting your next task.

St. Joseph County Clerk
1000 S. Michigan Street
South Bend, IN 46601
574-235-5371
Receipt for payment

Receipt number: C0000024
Date: 10/1/2017 10:41:19 AM
Amount paid: $196.00
Payment method: Cash
Received from: Marsha Brady
Memo:
Reference number:
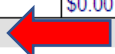
Case	Reason for payment	Payment Amount
Marsha Brady - Unassigned	Court Costs / Pay Automated Record Keeping Fee - State	$20.00
Marsha Brady - Unassigned	Court Costs / Pay Court Administration Fee - State	$5.00
Marsha Brady - Unassigned	Court Costs / Pay Court Administration Fee - City/Town	$3.60
Marsha Brady - Unassigned	Court Costs / Pay Court Costs - County	$32.40
Marsha Brady - Unassigned	Court Costs / Pay Court Costs - State	$84.00
Marsha Brady - Unassigned	Court Costs / Pay Document Storage Fee - County	$5.00
Marsha Brady - Unassigned	Court Costs / Pay Judicial Insurance Adjustment - State	$1.00
Marsha Brady - Unassigned	Court Costs / Pay Judicial Salaries Fee - State	$20.00
Marsha Brady - Unassigned	Court Costs / Pay Public Defense Admin Fee - State	$5.00
Marsha Brady - Unassigned	Court Costs / Pay Alternative Dispute Resolution Fee	$20.00

Received by: K. Thompson

Both parents ordered to pay:

In a delinquency case where the parents are not a party in the case, the notes will indicate who owes each fee.

In the event you have fees where mother and father have both been ordered to pay fees, it is very important to make sure you are applying fees to the appropriate fee as well as to the appropriate person ordered to pay.

- Requirements

Assigned date	Seq	Requirement type	Default payee	Status ▾	Status date
		Add a new requirement			
9/27/2018	7	✐ Detention Drug Screening Fee		(Balance: $10.00)	

Marquez Demon Carlisle (388651; Case: 1; 02D07-1608-JD-000917)

Name	Assess	Payments	Adjustments	Other	Due
Drug Screen due	$10.00	$0.00	$0.00	$0.00	$10.00
	Notes	Jarvis LaMar Carlisle, Sr. (Father - Non-custodial Parent)			

Assigned date	Seq	Requirement type	Default payee	Status	Status date
10/3/2018	9	✐ Public Defender Fee		(Balance: $12.50)	

Marquez Demon Carlisle (388651; Case: 1; 02D07-1608-JD-000917)

Name	Assess	Payments	Adjustments	Other	Due
PD Fee	$12.50	$0.00	$0.00	$0.00	$12.50
	Notes	Jarvis LaMar Carlisle, Sr. (Father - Non-custodial Parent)			

Assigned date	Seq	Requirement type	Default payee	Status	Status date
10/3/2018	9	✐ Public Defender Fee		(Balance: $12.50)	

Marquez Demon Carlisle (388651; Case: 1; 02D07-1608-JD-000917)

Name	Assess	Payments	Adjustments	Other	Due
PD Fee	$12.50	$0.00	$0.00	$0.00	$12.50
	Notes	Mendy T. Rothgeb (Mother - Legal Custody)			

Assigned date	Seq	Requirement type	Default payee	Status	Status date
2/2/2017	1	✐ Administrative Fee		(Balance: $25.00)	

Marquez Demon Carlisle (388651; Case: 1; 02D07-1608-JD-000917)

Name	Assess	Payments	Adjustments	Other	Due
Admin due	$50.00	($25.00)	$0.00	$0.00	$25.00
	Notes	Jarvis LaMar Carlisle, Sr. (Father)			

When you click the Take a Payment button, you will NOT want to put the amount of money being paid at the top in the Amount paid section as normal. You must put the amounts in the appropriate requirement amounts at the bottom of the screen.

The **eyeglasses** after each requirement is a link to the requirement notes. This will display who is ordered to pay this particular fee. If Father is paying $150.00, you will need to check each fee requirement's note to see if he is ordered to pay this fee, then enter the amount being paid on that fee in the amount column and move down the list until he has paid the total amount he wishes to pay.

As you go down the list applying amounts, the Amount paid at the top of the screen is totaling those amounts for you.

Click the **Update** button to save your work, you can then View and print your receipt.