

Requirements

Create the Teacher (Proctor in pems)

- ☐ Create a role called Teacher on the Word Press Site.
- ☐ Create a Teacher dashboard.
- ☐ The 'teacher' can not see the Principal dashboard.
- ☐ When the proctor logs on to their word press account, they can see all proctor log-on credentials to Moodle.
- ☐ The proctors can see all the students they manage in their Word Press Account.
- ☐ Proctors can see if their student has enrolled, been accepted or is paying tuition fees.
- ☐ Proctors can see the student log-on credentials and are responsible for telling students their log-ons.
- ☐ Proctors must sign terms and conditions before becoming active e-sign.

Principal

- ☐ The principal has to approve the teacher/proctor user role
- ☐ When a new teacher/proctor is added, the principal requests the user to be created in Moodle.
 - *note: when ever a new teacher/proctor is added in PEMS/Moodle, the principal is billed a fee.*
- ☐ A principal can also be a teacher/proctor.

Enrollment Form

- ☐ Parents must select the location (homeroom) and proctor when they submit their enrollment form.

Location

- ☐ Change the location page on the Word Press site to a simple table that lists the homeroom name as defined by the Principal
- ☐ Add location features: "on-site" "mobile" or "virtual" to accommodate different modalities of business models.

- ☐ Principals can control the features
- ☐ When a new location is added to any Word Press site, a homeroom is added to the PEMS.
 - *principals are not billed fees for a new location, since they are billed for the teacher/proctors associated to that location.*
- ☐ A unique code is created that links the word press location name to the PEMS homeroom, that the principal can not change.
- ☐ The principal can change the name of the location at any time.
- ☐ The principal can re-assign the student to a different location/homeroom.
- ☐ All teacher/proctors must be associated to the location in the Word Press site, there can be one teacher/proctor per location or multiple teacher/proctors per location.
- ☐ Parents should be able to enroll from a location table with listed proctors, if they click on a teacher/proctor, then this information is auto-entered in the enrollment form.

Proctor Advertising

Some proctors may want to advertise themselves on the Word Press Site. Create a page that showcases teachers and their qualifications, currently only visible to parents who have signed up as members. Later maybe public. In the teacher account, let them upload a picture and write a short bio. Present this information on the teacher page.

Billing

We need to provide payment acceptance on the Word Press site - then auto-log the sale, and also allow the principal to pay Studia Nova and teachers through the site, then auto log the expenses.

Principal sets up one bank account for the entire site and collects all fees.

Teachers pay membership fees using paid member pro, principal has admin access and sets the fees.

The membership fees are entered into the accounting module as a sale **when they are paid.**

Expenses paid through the Word Press site, including fees to Studia Nova and payments to teachers should be automatically logged as expenses in the accounting module. (using paypal?)

When the principal approves/requests a new teacher/proctor, a fee must be paid before the teacher is granted access.

- *note: Principals pay a one-time fee only for new teachers, no recurring. All recurring goes to the principal.*
- *can a payment confirmation show up in PEMS so we know to create the logins???*

When a parent pays the tuition, the revenue from the tuition is entered when paid into the accounting module as a sale.

Studia Nova bills tuition monthly by is done by invoicing the principal for the number of students enrolled at the end of the month. This invoice is done through Suite CRM. The Principal can pay with the site and then the payment is logged as an expense.

Bank to bank transfer capability would be good for b2b payments.

Paypal is needed for parents.

Revision #2

Created 27 April 2024 10:12:25 by Victoria

Updated 27 April 2024 12:12:11 by Victoria