

Collect and refund catechism fees

Find the fees still due, record a cash, bank transfer or cheque payment, and refund a fee, fully or in part.

4 min · Available · 2026-09-26

Before you begin

- ✓ You need View catechism payments to open the page.
- ✓ Recording a settlement needs Manage catechism payments and Manage catechism enrolments; refunding needs Refund catechism fees.

1 STEP 1 OF 4 · 30 S

Find the fees to collect

Open **Catechism** and then **Catechism fees**. At the top you find **Expected fees · year**, **Collected**, **Pending** and **Refunded**. In **Movements** filter by **Outstanding**, **Settled** or **Waived**, search for a child or pick a group from **All groups**.

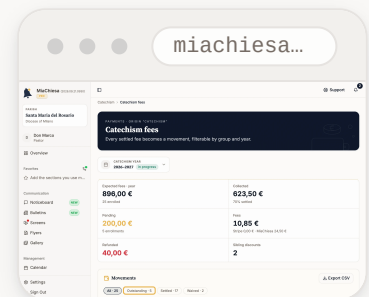


Fig. 1 Each filter shows how many fees are in that state.

2 STEP 2 OF 4 · 1 MIN

Record a settlement

On the row of an **Outstanding** fee select **Settle fee**. In **Record the settlement** check **Amount collected**, choose the **Method** among **Cash**, **Bank transfer** and **Cheque**, then select **Record settlement**.

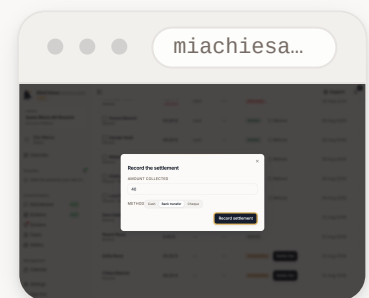


Fig. 2 Record settlement creates the movement with the chosen method.

3

STEP 3 OF 4 · 30 S

Check the movement

The row becomes **Settled**, with method and date, and the **Collected** total updates. With **Export CSV** you download the movements for the accounts.

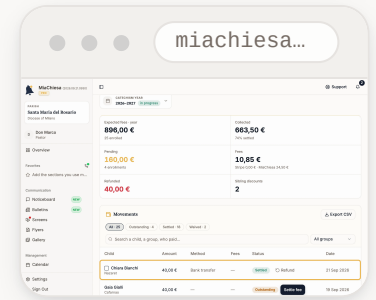


Fig. 3 The payment recorded by hand shows its method.

4

STEP 4 OF 4 · 1 MIN

Refund a fee

On the row of a **Settled** fee select **Refund**. In **Refund this payment?** choose **Full** or **Partial**: with **Partial** you enter **Amount to refund** and see **Still refundable** below. Write the **Reason**, which stays in the ledger and the family never sees, and confirm with **Refund**.

Payment refunded appears and the enrollment returns to «to pay». Card payments are refunded through Stripe. For several fees at once, tick the rows and use **Refund selected**.

Refund selected starts at once

The bulk refund asks for no further confirmation and cannot be undone: check the selection before pressing it.

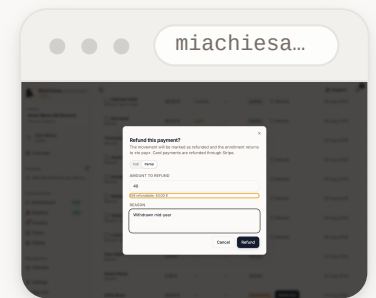


Fig. 4 Still refundable shows the maximum amount.

What you have achieved

- ✓ Fees collected by hand show as Settled, with method and date.
- ✓ Refunds are recorded in the movements and the enrollment returns to to pay.

Troubleshooting

I can't see Settle fee ✕

It appears only on Outstanding fees, and you also need Manage catechism enrolments besides Manage catechism payments.

I see "You do not have permission to update the enrollment's payment status: managing catechism enrollments is required. No movement was recorded." ✕

Ask whoever manages catechism for Manage catechism enrolments, then record the settlement again.

I can't see Refund ✕

You need Refund catechism fees; the button appears only on Settled fees with an amount still refundable.

I see "Could not refund the payment." ✕

The refund did not go through: check the movement and try again.