User Manual

MEDIA SPECIALISTS & LIBRARIANS

Chandler Unified School District

Table of Contents

Revised 2/7/18

InTouch/Destiny Interface Overview

Fine information from Destiny and payment information from InTouch interface nightly beginning at 5 pm. Payment information will only be reflected in Destiny once the payment has been entered in InTouch and the Bookstore Manager or Admin. Assistant has done their end of period closeout (EOP).

Important: Textbook/Library Book fines must be created in Destiny in order for the interface to work!
Do not enter payments, adjustments or waivers in Destiny, they should only be entered in InTouch by your site's Bookstore Manager (High School) or Admin. Assistant (Jr. High & Elementary).

A. **Creating a fine for an overdue/lost book or damaged book:**
   1. Mark the book as lost in Destiny or create a damaged fine
   2. The fine will be created and imported into InTouch during the nightly interface

B. **Making a payment on a textbook or library fine:**
   1. The payment will be entered by the Bookstore Manager or Admin. Assistant against the fine in InTouch
   2. Do nothing in Destiny; the fine will be marked as paid in Destiny during the nightly interface

C. **Student has a waiver for a textbook or library fine:**
   1. The Bookstore Manager or Admin. Assistant will waive the fine in InTouch
   2. The fine will be removed in Destiny during the nightly interface

D. **Student has a partial waiver for working off a library fine:**
   1. Notify the Bookstore Manager or Admin. Assistant of the amount of the waiver
   2. The Bookstore Manager or Admin. Assistant will reduce the fine amount accordingly
   3. Multiple partial waivers may be entered to completely work off a fine
   4. The fine will be adjusted in Destiny during the nightly interface

E. **Student returns an overdue/lost book:**
   1. Return the book in Destiny
   2. The fine will be removed from InTouch during the nightly interface

F. **Student returns a lost book they previously paid for:**
   1. Check in the book in Destiny
   2. Notify the Bookstore Manager or Admin. Assistant that a refund is due to the student
   3. The Bookstore Manager or Admin. Assistant will process an Accounts Payable refund in InTouch
   4. A refund check will be sent to the parent within 2-3 weeks

Things to remember:
- Books must be marked "Lost" in Destiny and a fine generated in order for the fine to show up in InTouch
- Do not enter payments, adjustments or waivers in Destiny, they should only be entered in InTouch
- Lost books that have been paid for will not show as paid in Destiny until the nightly interface has occurred

InTouch Systems

- o **InTouch Terminal** – to lookup students and view Customer History
- o **InTouch Manager** – to run outstanding fine and payment reports

Item Listing

- o **LOSTLIBRARY –** Fines created in Destiny for Library Books
- o **LOSTTEXTBOOK –** Fines created in Destiny for Textbooks

Terminal Buttons Overview

Home Screen Terminal Buttons
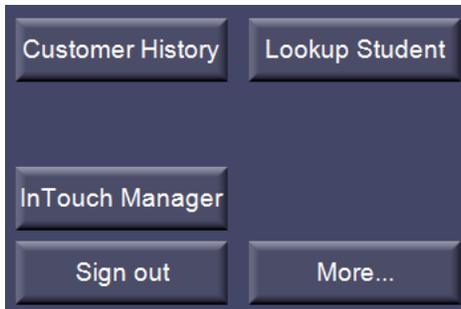
- • **Customer History** – to view a student's payment history

- • **Lookup Student** – to find a student at your site

- • **InTouch Manager** – to access InTouch Manager to run reports

- • **Sign Out** – to sign out of InTouch Terminal

Help

If you need any help with InTouch or have any questions, please contact:

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Lookup Students

To Lookup a Student

The Lookup Student function is used to find an individual student. Student records are updated nightly from Infinite Campus, so if a student has recently enrolled they may not be in InTouch yet.

1. Log in to InTouch Terminal and select the *Lookup Student* tab on the left hand side of the screen.
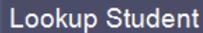
2. You can sort the list of students by District ID, student Last Name or Grade. Type in the student ID or last name in the search bar.

   Note: InTouch's default setting shows you only active students. To view a student that is no longer enrolled at your school, click on the Active/Inactive drop down filter and select *Inactive*.

3. Select the correct student by clicking on the row with the student's name and ID number.

4. Click the *Lookup Student* button to start over.

To Lookup a Student No Longer at Your Site

If a student is not listed in InTouch at your site as an "Active" or "Inactive" student, it may be because the student has transferred to another school within the district or is no longer a student at CUSD.

1. Log in to InTouch Terminal and select the *Lookup Student* tab on the left hand side of the screen.
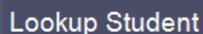
2. You can sort the list of students by District ID, student Last Name or Grade. Type in the student ID or last name in the search bar.

3. If the student does not appear, search the entire district by selecting the *Lookup at District* button on the bottom right-hand corner of the screen.

4. Select the correct student by clicking on the row with the student's name and ID number.

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View Outstanding Destiny Fines

To View a Student's Outstanding Fines/Fees

Any library book or textbook fines from Destiny will appear as fines on the student's account in InTouch.

1. Search for the student you are looking for by following the directions on page 5 to Lookup a Student.
2. Click the *Customer History* button on the right hand side of the screen.

   Customer History

3. If a student has any outstanding library or textbook fines, you can view them under the Fines tab at the top of the page.

Receipts	Receipt List	**Fines**	Fees	Account	Notes

   Note: Any payments may be viewed under the Receipts tab.

4. You will see the date the fine was assessed, the site that created the fine, the type of fine, a description of the fine that includes the Destiny barcode number and book title, as well as the amount of the fine.

Date		Type	Fine #	Fine Description	Memo	Amount
1/25/2018	Frye Elementary School	Fine	120897	LOST LIBRARY BOOK	Lost: 30000001005471: Jump, pup!	$4.00
					Amount Due:	$4.00

   Note: If you are expecting to see a Destiny fine on the student's account but it is not there, it could be for one of the following reasons:

   - The fine has already been paid and is no longer outstanding (paid fines can be viewed under the *Receipts* tab of the student's *Customer History*)
   - The fine has been waived
   - The fine has not yet been imported from Destiny via the nightly interface

Customer History

Use the *Customer History* button to view reports of paid receipts, outstanding fines/fees and other notes.

1. Search and select the appropriate customer from *Lookup Student (pg. 5)*.

   Lookup Student

2. Once a student is selected, click on the *Customer History* button.

   Customer History

3. Use the date filter at the bottom to control how much history is returned. The system defaults to 01/01/2000.

   From 1/ 1/2000

4. Payment history, voids and refunds will appear from newest to oldest on the Customer Ledger report. You can also view additional information by clicking on the various tabs at the top of the screen.

Notes – notes on the student's record. Notes are viewed only by InTouch Terminal users and are not viewable by parents or other customers

Account – ledger of on-account related activities

Fees – ledger of current fees

Fines – ledger of current fines

Receipt List – list of receipts by date and the option to View, Email or Reprint each receipt

Receipts – history of items paid for

To Re-Print a Receipt through Terminal - Customer History
1. Lookup the student (pg 5.)
2. Click on the Customer History button

Customer History

3. Select the Receipt List tab

| Receipts | Receipt List | Fines | Fees | Account | Notes |

4. Find the receipt you want to print and click the *Reprint* button

Receipts	Receipt List	Fines	Fees	Account	Notes				

Receipt #	Date	Amount			
630	6/28/2017 10:06 AM	$0.50	View	Email	Reprint
576	6/20/2017 3:41 PM	$55.00	View	Email	Reprint
573	6/20/2017 3:30 PM	$160.00	View	Email	Reprint

To Re-Print a Receipt through InTouch Manager – Reprint Receipt Report
1. Go to the Reports tab

Reports

2. Under the Audit section select *Reprint Receipt*

Audit

Sequential Receipts	Reconciled Receipts
Electronic Journal	Non-Reconciled Receipts
Check Audit	Refund Receipts
Pre-EOP Void Receipts	Reprint Receipt

3. Enter the receipt number and click the *Show Report*

Site

NORTH HIGH SCHOOL

Receipt

⊙ Receipt #

123

○ Receipt #

○ By Terminal # and Date Range

Terminal:

7/ 3/2017 to 7/ 3/2017

Show Report

To access the InTouch Reports you will need to login to InTouch Manager.
Click on the *Reports* tab to access all of the reports.
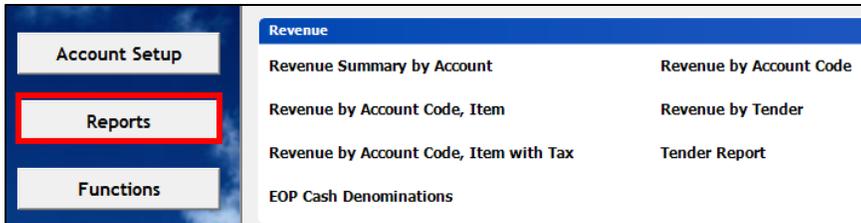
To View Outstanding Fines:
Reports > Customer > Customer Fine/Fee Listing – Detail

- **Customer Fine/Fee Listing Detail** – provides a list of students with outstanding Destiny fines, the book name, fine amount and date the fine was assessed.

    1. Type – click the bubble for *Fines and Fees*
    2. Date Range – enter beginning and end dates (July 1st is the recommended beginning date)
    3. Customers – to see all students, select Grade and click the checkbox for "All Grades" otherwise, you can click Customer and search for a specific student.
    4. Item/Account Code – select Item and then choose **LOSTLIBRARY** or **LOSTTEXTBOOK** from the drop down menu
    5. Fines/Fees From All Sites – *Include* to see all of a student's fines/fees
    6. Customers From All Sites - *Exclude*
    7. Privacy Options – *Customer Name*
    8. Page Break – *None* or choose *Between Customers* if you want each customer to be on their own page
    9. Click *Show Report*

Customer Fine/Fee Listing - Detail   9/21/2017 5:18 PM

Item: LOST LIBRARY BOOK
Date Range: 7/1/2017 - 9/21/2017
Customers at Andersen Junior High School

Holden Everson

Fine/Fee #	Date	Type	Item #	Description	Memo	Amount
94571	9/13/2017	Fine	LOSTLIBRARY18	LOST LIBRARY BOOK	Lost: T 2630: The house on Mango Street	$8.00
					Amount Due:	$8.00

Gavin Van Tassel

Fine/Fee #	Date	Type	Item #	Description	Memo	Amount
69068	8/8/2017	Fine	LOSTLIBRARY18	LOST LIBRARY BOOK	Lost: T 5737: Big Nate Strikes Again ; #2	$7.00
					Amount Due:	$7.00
					Total Amount Due:	**$15.00**

To View Payments:

Reports > Customer > Customer Purchases by Item

- **Customer Purchases by Item** – provides a listing of all students who have paid a Destiny fine, the date paid, receipt number, amount and the name of the book.

    1. Item – select **LOSTLIBRARY** or **LOSTTEXTBOOK** from the drop down menu
    2. Customers – defaults to *All*
    3. Date Range – enter beginning and end dates (July 1st is the recommended beginning date)
    4. Exclude Adjustments – leave all checkboxes blank
    5. Item Data Value – leave blank
    6. Memo – leave blank
    7. Sort by – you can sort the report by Last Name, Date or Price
    8. Misc. – check the boxes for all except *Rollup Transactions* and *Show Signature Line*
    9. *Click Show Report*

Customer Purchases by Item

Date Range: 9/21/2017 - 9/21/2017
Site: Andersen Junior High School
Item: LOSTLIBRARY18

Item #:	LOSTLIBRARY18
Item Desc:	LOST LIBRARY BOOK
Account Code:	1855512220-1992

Receipt #	Date	Customer ID	Name	Grade	Memo	Qty	Total
122625	9/21/2017	340150	Conner, Nevaeh	08	Lost: T 6663: Eight keys	1	$7.00
						1	$7.00