

REMARKS:

05A-1
SUMMARY

05A-2

05A-3

05A-4
[content abbreviated]

05A-5

05A-6

05A-7
[content abbreviated]



22 September 2009. 15:25pm
SSS Subscriptions Report 2009



741 Subscribers in 2009	At least 108 have overpaid.
	At least 59 have underpaid. (All over- and under- paid are through maili-ns)
	45 organizations with "Montessori" in their name
	10 organizations represented by NAIS Trustees

Subscriber Type Counts		
PRODUCT_CODE	COUNT	PERCENTAGE
SSS_2009_ORG	1	0.13
SSS_2009	515	69.5
SSS_2009_SMALL	225	30.36
	741	99.99

Subscriber Membership Class			
PRODUCT_CODE	MEMBER_TYPE	COUNT	PERCENTAGE
SSS_2009	Member	425	57.35
SSS_2009	Non-Member	90	12.15
SSS_2009_ORG	Member	1	0.13
SSS_2009_SMALL	Member	81	10.93
SSS_2009_SMALL	Non-Member	144	19.43
		741	99.99

Subscriber Region and Type Counts			
REGION_CODE	PRODUCT_CODE	COUNT	PERCENTAGE
AA	SSS_2009	1	0.13
Eastern Midwest and Mid Atlantic	SSS_2009	131	17.68
{ etc }			
Western Midwest and Mountain States	SSS_2009	53	7.15
Western Midwest and Mountain States	SSS_2009_SMALL	26	3.51
		741	99.99

Subscriber Comparison vs Previous Year		
2009 vs 2008	COUNT	PERCENTAGE
NEW Subscriber	10	1.35
Not Paid 2008	2	0.27
Paid 2008	729	98.38
	741	100

Subscriber Source		
SOURCE_CODE	COUNT	PERCENTAGE
FAX	1	0.13
Mail	480	64.78
Phone	47	6.34
E-mail	1	0.13
Web	212	28.61
	741	99.99

Subscription Weekly Comparison					
DATE	SUB-TOTAL	RUNNING TOTAL	DATE	SUB-TOTAL	RUNNING TOTAL
5/11/08	3	3	11/23/08	15	2,019
5/18/08	36	39	11/30/08	33	2,052
{ etc }					
7/27/08	92	1,526	2/8/09	11	2,215
8/3/08	53	1,579	2/15/09	13	2,228

REMARKS:

05B-1
SUMMARY

05B-2

05B-3

05B-4

05B-5

05A-6

22 September 2009. 15:25pm
Cash Settlement Report



NAIS Finance & Administration Group
School of Student Service for Financial Aid
Statement of Account as of 30 June 2009

	NAIS FY09			NAIS FY08		
	Jan - Jun	Month of June, 30	YTD June 08-09	YTD June 07-08		
VOLUME						
PFS(1)	127,156	4,391	155,088	145,499	9,589.00	7%
Family Reports		727	42,739	42,659	80.00	0%
Designated Schools		5,194	204,167	189,229	14,938.00	8%
Comp* Assist Subscribers						
CASH COLLECTIONS						
Fees from Schools		-	-	145,499		
PFS Processing Fees		-	-	42,659		
Workshop Income		-	-	189,229		
Comp* Assistant Sales		-	-			
Total Cash Collections		105,127	4,886,568	4,733,106		
CONTRACT PRICE						
Fixed Price(2)	\$276,792	\$46,132	\$851,792			
Variable Price (3)	\$1,049,037	\$36,226	\$1,279,476			
Total Contract Price	\$1,325,829	\$82,358	\$2,131,268			
SETTLEMENT						
Final Balance Due to (From) NAIS at July 31, 2008:			\$0			
Cash Collections (from above)			\$4,886,568			
Contract Price			(\$2,131,268)			
YTD Settlement Balance Due To NAIS			\$2,755,300			
Payments To (From) SSS			(\$2,733,191)			
Settlement Balance			\$22,109			

Notes

(1) - Includes 118198 Online PFSs, YTD
(2) - Monthly Fixed Price
= 1/12 of Total Fixed Price
(3) - Variable Price
= PFS volume X \$8.25

	Month of June, 30	YTD June 08-09
FEE WAIVERS AS OF JUNE YTD		
Online Fee Waivers From Schools	\$2,622	\$83,665
Online Fee Waivers From Orgs	\$368	\$78,181
Paper Fee Waivers From Schools	\$2,393	\$69,984
Paper Fee Waivers From Orgs	\$144	\$82,308
Total	\$5,527	\$314,128

ONLINE PFS YTD	
Prior Year	5868
Current Year	112330
	118198

REMARKS:

05C-1
SUMMARY

05C-2
[content abbreviated]

05C-3
[content abbreviated]

22 September 2009. 15:25pm

Conference & Workshop Registration Report



[MONTH] [TOTAL INCOME] [TOTAL REGISTERED]	[CONFERENCE NAME] ([PRODUCT CODE]) [STATE/PROVINCE]
---	--

Registered Members ((TOTAL NUMBER))						
Full_Name	Family Income	City	State	Zip	Phone	Email
iMIS ID	Reg. Date	Reg. Category		Pay Type	Amount	Reg. Type
[Data]	[Data]	[Data]	[Data]	[Data]	[Data]	[Data]
[Data]	[Data]	[Data]	[Data]	[Data]	[Data]	[Data]
Notes: [Data]						
[Data]	[Data]	[Data]	[Data]	[Data]	[Data]	[Data]
[Data]	[Data]	[Data]	[Data]	[Data]	[Data]	[Data]
Notes: [Data]						
[Data]	[Data]	[Data]	[Data]	[Data]	[Data]	[Data]
[Data]	[Data]	[Data]	[Data]	[Data]	[Data]	[Data]
Notes: [Data]						
[Data]	[Data]	[Data]	[Data]	[Data]	[Data]	[Data]
[Data]	[Data]	[Data]	[Data]	[Data]	[Data]	[Data]
Notes: [Data]						

{ etc }

Registered Non-Members ((TOTAL NUMBER))						
Full_Name	Family Income	City	State	Zip	Phone	Email
iMIS ID						
[Data]	[Data]	[Data]	[Data]	[Data]	[Data]	[Data]
[Data]						
[Data]	[Data]	[Data]	[Data]	[Data]	[Data]	[Data]
[Data]						
[Data]	[Data]	[Data]	[Data]	[Data]	[Data]	[Data]
[Data]						
[Data]	[Data]	[Data]	[Data]	[Data]	[Data]	[Data]
[Data]						

{ etc }

REMARKS:

05D-1
HEADER

Type may be: daily, weekly, monthly, yearly or total.

05D-2

Date range is shown as "from - to" for all report types, except "daily"

22 September 2009. 15:25pm

Inventory Report



[Date From] - [Date To]
[Type]

[Publication Name]

Registered Members ([TOTAL NUMBER])			
PUBLICATION_NAME	DATE_RANGE	INVENTORY	SALES
[Data]	[Data] to [Data]	[Data]	[Data]
[Data]	[Data] to [Data]	[Data]	[Data]
[Data]	[Data] to [Data]	[Data]	[Data]
[Data]	[Data] to [Data]	[Data]	[Data]
[Data]	[Data] to [Data]	[Data]	[Data]
[Data]	[Data] to [Data]	[Data]	[Data]
[Data]	[Data] to [Data]	[Data]	[Data]
[Data]	[Data] to [Data]	[Data]	[Data]
[Data]	[Data] to [Data]	[Data]	[Data]
TOTAL		[Data]	[Data]

REMARKS:

05E-1
HEADER

05E-2

Due to the significant volume of data available for this report, more detail and analysis is required before a wireframe can be created.

22 September 2009. 15:25pm

StatsOnline Activity Report



[Year]	[School Name] or [Region/City State]
[Average Total Income]	

Activity					
HEADING	HEADING	HEADING	HEADING	HEADING	HEADING
[Data]	[Data]	[Data]	[Data]	[Data]	[Data]
[Data]	[Data]	[Data]	[Data]	[Data]	[Data]
[Data]	[Data]	[Data]	[Data]	[Data]	[Data]
[Data]	[Data]	[Data]	[Data]	[Data]	[Data]
[Data]	[Data]	[Data]	[Data]	[Data]	[Data]
[Data]	[Data]	[Data]	[Data]	[Data]	[Data]
[Data]	[Data]	[Data]	[Data]	[Data]	[Data]
[Data]	[Data]	[Data]	[Data]	[Data]	[Data]

REMARKS:

05F-1
HEADER

05F-2

22 September 2009. 15:25pm

Financial Aid Research Report



[Year]	[School Name] or [School Size] [School Type] [Tuition Level] [City/State] [Religious Affiliation] [NAIS Membership]
Current YTD total financial assistance to families vs PYTD	[data]
Current month and YTD average school award to families vs PYTD	[data]
Current month and YTD average family contribution vs PYTD	[data]
Current month and YTD average effective income and discretionary income vs PYTD	[data]
Current month and YTD total # of adjustments by schools to the numbers provided by families	[data]
Net \$ impact of those changes to the original family contribution	[data]

REMARKS:

05G-1
HEADER

05G-2
[content abbreviated]

[Parent Name] or [School Name] or
[Region] or [City/State]

Parent Details ((TOTAL NUMBER))					
<div>Mr Michael Smith 202 222 1234</div> <div>Jonathan Smith Susan Smith</div>		<div>Washington, DC, 20045, USA msmith@yahoo.com</div> <div>[Student Status] [Student Status]</div>	<div>Total Income Total Allowances Effective Income</div>	<div>\$(data) \$(data) \$(data)</div>	<div>Income Supplement Discretionary Income Est. Family Contribution</div> <div>\$(data) \$(data) \$(data)</div>
<div>[Full Name] [phone]</div> <div>[Student name] [Student name]</div>		<div>[City],[State],[ZIP], [Country] [email]</div> <div>[Student Status] [Student Status]</div>	<div>Total Income Total Allowances Effective Income</div>	<div>\$(data) \$(data) \$(data)</div>	<div>Income Supplement Discretionary Income Est. Family Contribution</div> <div>\$(data) \$(data) \$(data)</div>
<div>[Full Name] [phone]</div> <div>[Student name] [Student name]</div>		<div>[City],[State],[ZIP], [Country] [email]</div> <div>[Student Status] [Student Status]</div>	<div>Total Income Total Allowances Effective Income</div>	<div>\$(data) \$(data) \$(data)</div>	<div>Income Supplement Discretionary Income Est. Family Contribution</div> <div>\$(data) \$(data) \$(data)</div>
<div>[Full Name] [phone]</div> <div>[Student name] [Student name]</div>		<div>[City],[State],[ZIP], [Country] [email]</div> <div>[Student Status] [Student Status]</div>	<div>Total Income Total Allowances Effective Income</div>	<div>\$(data) \$(data) \$(data)</div>	<div>Income Supplement Discretionary Income Est. Family Contribution</div> <div>\$(data) \$(data) \$(data)</div>
<div>[Full Name] [phone]</div> <div>[Student name] [Student name]</div>		<div>[City],[State],[ZIP], [Country] [email]</div> <div>[Student Status] [Student Status]</div>	<div>Total Income Total Allowances Effective Income</div>	<div>\$(data) \$(data) \$(data)</div>	<div>Income Supplement Discretionary Income Est. Family Contribution</div> <div>\$(data) \$(data) \$(data)</div>
<div>[Full Name] [phone]</div> <div>[Student name] [Student name]</div>		<div>[City],[State],[ZIP], [Country] [email]</div> <div>[Student Status] [Student Status]</div>	<div>Total Income Total Allowances Effective Income</div>	<div>\$(data) \$(data) \$(data)</div>	<div>Income Supplement Discretionary Income Est. Family Contribution</div> <div>\$(data) \$(data) \$(data)</div>
<div>[Full Name] [phone]</div> <div>[Student name] [Student name]</div>		<div>[City],[State],[ZIP], [Country] [email]</div> <div>[Student Status] [Student Status]</div>	<div>Total Income Total Allowances Effective Income</div>	<div>\$(data) \$(data) \$(data)</div>	<div>Income Supplement Discretionary Income Est. Family Contribution</div> <div>\$(data) \$(data) \$(data)</div>
<div>[Full Name] [phone]</div> <div>[Student name] [Student name]</div>		<div>[City],[State],[ZIP], [Country] [email]</div> <div>[Student Status] [Student Status]</div>	<div>Total Income Total Allowances Effective Income</div>	<div>\$(data) \$(data) \$(data)</div>	<div>Income Supplement Discretionary Income Est. Family Contribution</div> <div>\$(data) \$(data) \$(data)</div>

{ etc }

REMARKS:

05H-1
HEADER

05H-2

22 September 2009. 15:25pm

Call Center Report



[Date From] - [Date To]

[Region] [City / State]

[Reason Code]

Calls ([TOTAL NUMBER])

[illegible]

{ etc }

REMARKS:

051-1
MAIN DASHBOARD SCREEN

Page can be personalized to suit individual needs. Items can be dragged around by the userto re-arrange the layout.

22 September 2009. 15:25pm
Welcome back Donna

print | edit page settings

NAIS

NATIONAL ASSOCIATION OF
INDEPENDENT SCHOOLS

Management Reporting Dashboard

Conference and Workshop Registrations

edit X

[CONFERENCE NAME] ([PRODUCT CODE])
[STATE/PROVINCE]

Total Income: [data]
Members Registered [data]
Non-Members Registered [data]

See full report ▶

Cash Settlement Summary

edit X

Jan - JunJun, 30Jun 08-09

Total Cash Coll.\$105,127\$4,886,568

Total Contract Pr.\$1,325,829\$82,358\$2,131,268

Settlement Balance\$22,109

See full report ▶

Subscriptions Summary (2009)

edit X

Total:
741

108+ overpaid (through mail-in)
59+ underpaid (through mail-in)
45 name match "Montessori"
10 Represented by NAIS Trustees

See full report ▶

Financial Aid Research Summ...

edit X

Current YTD total financial assistance to families vs PYTD[data]

Current month and YTD average school award to families vs PYTD[data]

Current month and YTD average family contribution vs PYTD[data]

Current month and YTD average effective income and discretionary income vs PYTD[data]

Current month and YTD total # of adjustments by schools to the # provided by families[data]

Net \$ impact of those changes to the original family contribution[data]

See full report ▶

051-2
DASHBOARD CONFIGURATION SCREEN

Interactive interface where user configures view for their personalized dashboard page.

22 September 2009. 15:25pm
Welcome back Donna

NAIS
NATIONAL ASSOCIATION OF
INDEPENDENT SCHOOLS

Management Reporting Dashboard

Drag items to your "My Modules" area to include them on your page. Drag them out to remove them.

My Modules

Conference and Workshop Registrations

Subscriptions Summary

Cash Settlement Summary

Financial Aid Research Summary

Save Changes

Cancel

Available Modules

[Module Name]

[Module Name]

[Module Name]

[Module Name]

[Module Name]

[Module Name]

[Module Name]

[Module Name]

io
notes