Mwalimu Ease · Mwalimu Insights

How to Prepare a School Fees Statement Parents Actually Understand (Template + Example)

School Fees · 16 Nov 2026

What a Kenyan school fees statement must show — itemised vote heads, payments with references, opening and closing balances — plus a worked example, common mistakes and when to send it.

A school fees statement is a per-family account document: the balance carried forward, every charge for the period itemised, every payment received with its date and reference, and the closing balance with clear payment instructions. Parents pay faster when they can see exactly what the number is made of — and a statement that cannot explain itself generates office visits instead of payments.

Who this guide is for

Bursars, school accountants and administrators who send fee statements to parents or guardians, and headteachers who sign them off. The examples use Kenyan practice: termly billing, vote heads such as tuition, lunch and transport, and M-Pesa as the dominant payment channel.

Statement, invoice and receipt — know the difference

Parents and staff often use the three words interchangeably, and that confusion causes real errors:

- **Invoice (fee demand):** what the school is asking for — issued at the start of term before payment.
- **Receipt:** proof of one specific payment, issued when money arrives.
- **Statement:** the running account — opening balance, all charges, all payments, closing balance. It is the only document that answers "where do we stand?"

What every statement must show

Element

Why it matters

School name, contacts and payment details

Till/paybill number, bank account, office phone — a statement with no payment instructions stalls payment

Learner name, admission number, class and stream

Admission number settles same-name disputes instantly

Statement period and date issued

"Term 3 2026, as at 14 November 2026" — balances are meaningless without an as-at date

Opening balance carried forward

Separates old debt from this term's charges — parents contest balances they did not expect

Charges itemised by vote head

Tuition, lunch, transport, exams, activity — never one unexplained total

Payments received, each with date and reference

The parent's M-Pesa message should match a line on the statement

Credits: discounts, bursaries, refunds

A sibling discount that never appears on the statement looks like overcharging

Closing balance, clearly labelled

"Balance due: KSh 15,300" — the number the whole document exists to show

Due date and what happens next

"Kindly clear by..." with the follow-up contact

A worked example

Statement for a Grade 5 learner, Term 3 2026:

Line

Detail

Amount (KSh)

Balance brought forward (Term 2)

Cleared — KSh 0

0

Tuition

Term 3

24,000

Lunch programme

Term 3

6,500

Transport (Zone 2)

Term 3

9,000

Assessment fee

End-of-year assessment

800

Payment received

3 Sep, M-Pesa ref QHK7…

−15,000

Payment received

30 Sep, M-Pesa ref QLM2…

−10,000

Sibling discount

5% off tuition

−1,200

Balance due

Kindly clear by 28 Nov 2026

14,100

Every number on that statement can be traced. The parent can match both M-Pesa confirmations to lines, see the discount they were promised, and know the exact figure and deadline. That is what makes parents pay without phoning first.

Step by step: producing a statement that is right the first time

- **Fix the fee structure before the term starts.** Charges per grade and vote head — tuition, lunch, transport, boarding, exams — agreed and recorded once, not typed per statement.
- **Post charges to each learner's ledger.** Only learners actually enrolled, at the correct grade and stream, with the right options (a day scholar must never see a boarding charge).
- **Post every payment the day it arrives.** M-Pesa till/paybill confirmations, bank deposits and cash, each with its reference. A payment posted late is a dispute created.
- **Apply credits properly.** Discounts, bursaries and refunds post as credit lines — never by quietly editing the charge.
- **Carry forward the true opening balance.** If last term ended with an unpaid balance or an overpayment, it must appear as the first line, labelled.
- **Generate, then spot-check.** Pick a handful of learners per class and check the statement against the ledger and the parent's own payment records before anything goes out.

Common mistakes that trigger disputes

- **One lump "fees" line.** A parent cannot verify a total they cannot break down — they will assume it is wrong.

- **Sending before posting recent payments.** The classic: the parent paid on Friday, the statement went out Monday showing the old balance, and now the bursar's phone is ringing.
- **No receipt references.** "Payment received — KSh 10,000" with no date or M-Pesa code cannot be matched to anything.
- **Mystery lines.** "Other charges — KSh 1,700" with no explanation is the single biggest generator of office-queue disputes.
- **Mixing learners' accounts.** Siblings' payments posted to the wrong child, or one statement showing another family's balance.
- **Missing as-at date.** A statement printed on Tuesday but dated from last week gets treated as proof of an old balance.

When to send statements

Three rhythms work in Kenyan schools:

- **Start of term:** with the invoice or shortly after — sets the baseline and surfaces carried-forward balances while there is still time.
- **Mid-term:** a short statement doubles as a polite reminder and catches unposted payments before the end-of-term scramble.
- **Closing day:** the final account going into the holidays — this is the one parents keep, and the one next term's opening balance is built from.

Where Mwalimu Ease fits

In Mwalimu Ease, a learner's fee statement is a live view, not a document someone types up. Fee categories hold your vote heads; the fee structure sets charges per grade; and payments recorded against a learner — with method and reference — build the statement automatically, receipts included. Balances update as payments post, bulk fee assignment handles a whole class at once, and the finance dashboard shows who owes what across streams, with Excel export when you need a paper trail. Fee reminders can be sent straight from the same data, so the statement and the follow-up never disagree. Related guides: managing school fees records, calculating outstanding balances and building an arrears report. See the finance documentation for the full workflow.

Frequently asked questions

How often should a school send fee statements?

At minimum once a term on closing day; better practice is three times — start of term, mid-term and closing. Every extra statement is one fewer surprise at report-card day.

Should one statement cover siblings?

Keep each learner's ledger separate — charges and payments belong to a specific child — but it is fine to add a combined family total for convenience, clearly labelled.

What if a parent disputes a figure?

Walk the statement line by line against receipts and the ledger. If a payment was missed, post it with its reference and issue a corrected statement dated as at today — never edit the old one silently.

Can a statement show next term's fees in advance?

You can include a notice line ("Term 1 2027 fees: KSh …"), but keep it visually separate from the current balance so parents do not pay the wrong figure.

Is a printed statement still needed if parents pay via M-Pesa?

Yes — M-Pesa confirms money moved, not what it was for. The statement is what ties each payment to charges and a balance.

Sources

- Ministry of Education, Kenya — school fees guidelines for public institutions (private schools set their own structures but should keep statements transparent)
- Mwalimu Ease finance documentation

Last reviewed: 16 November 2026.

Published 16 Nov 2026 · mwalimuease.com/news/how-to-prepare-a-school-fees-statement-parents-actually-understand-template-example/