Fee Billing Batch Report

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The **Fee Billing Batch Report**, also called the **Batch Fee Billing Statement** report, builds a billing statement for each student, person or household that meet the criteria selected on the report editor. The report includes people or households that are carrying an unpaid balance even if they have an inactive enrollment.

Fee Billing Batch ☆

Batch Fee Billing Statement Report

Batch version of the Fee Billing Statement Report. This report may be run for students, people or households. By default, the report includes people or households that are carrying a balance, have either an active or inactive enrollment and prints an additional statement for anyone with a 2nd Mailing Address. Use the report options to modify the default behavior.

You'll notice that there is a generous amount of whitespace in the address area of the statement. This is because the statement is printed in the address letter format which is compatible with business size window envelopes.

Which type of report would you like to run?

⦿ Student ◯ Person ◯ Household

⦿ Grade

> All Students
> EC
> HK
> KE
> PA

◯ Ad Hoc Filter

☑ Active Students Only

Enrollment Effective Date: 11/24/2020

☐ Include $0 Balance and Paid Fees   Warning: Selection will result in a large amount of data.

Which fees would you like to include in the report?
Ctrl-click or Shift-click to select multiple

> All Fees
> *District fee $15.00
> *Kennedy Fee $20.00
> All Book fine $35.00 (inactive)
> All Schools Reg Waived Fee $0.00 (inactive)
> FS Classroom Healthy Treat $0.00*

Fee Assigned School Year

> All Years
> 20-21
> 19-20
> 18-19
> 17-18
> 16-17

☐ Only include overdue fees

☐ Include Fees from All Schools

Print Options   ☑ Prepare report for duplex printing

☑ Include 2nd Mailing Addresses

☑ Include Guardian's name

☐ Include Salutation   To Parent/Guardian of:

☐ Hide Comments

Address Font Size 8 pt ⌄

Notes: (displayed on page 1 of each billing statement)

Notes Font Size 8 pt ⌄

Sort Options ⦿ Student Name ◯ Grade

[Generate Report]   [Submit to Batch]

Fee Billing Batch Editor Example

Report Logic

- A Fee Billing Statement prints for the students who have or had an enrollment in the School or Calendar you select in Campus.

- The return address on the Fee Billing Statement is the address for the School or Calendar selected in the toolbar.

- You can generate the Batch Fee Billing Statement for students, persons or households. The options available in the Fee Billing Batch Report editor vary based on whether *Student,*

Person or *Household* is selected. See the following section called Report Types and Examples for more information.

- The student/person's name prints on the billing statement where it is visible when folded and placed in a #10 envelope with an address window.
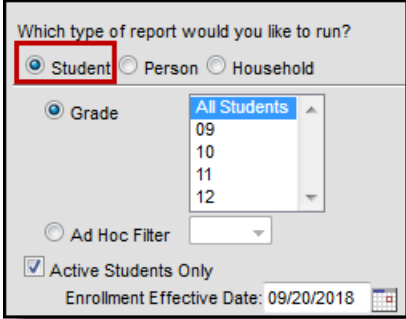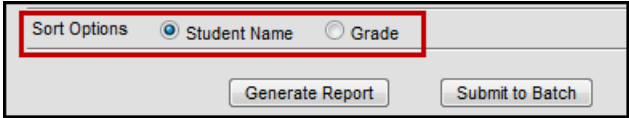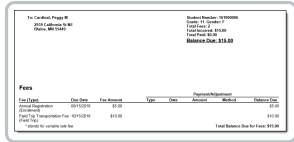
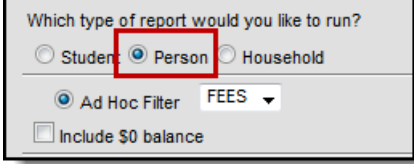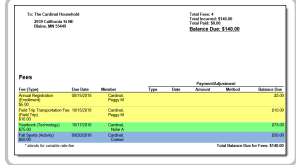> See the Printing Labels documentation for information on folding reports for window envelopes.
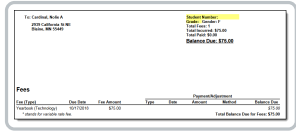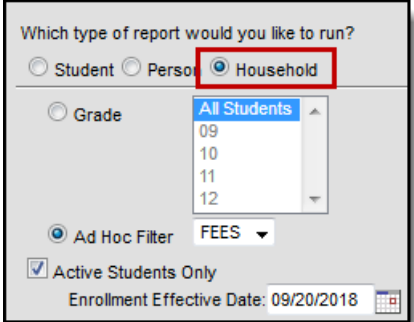
- Mailing addresses are printed for households that have the **Mailing** checkbox selected in *Census > Household > Addresses*.

  ▶ Click here to expand...

- A relationship between the student and the person who has the **Mailing** checkbox selected is also required for the report to generate (*Census > People > Relationships*).

  ▶ Click here to expand...

- Fee information for any report type (student, person or household) will NOT print when the following is true:
  - When there is no primary household assigned for the student.
  - When the primary household for the student has an end date that is the current date or a previous date.
  - When there is no primary address for the student.
  - When the primary address for the student has an end date that is the current date or a previous date.

- Keep the following items in mind when generating the Fee Billing Batch Report for each report type:

  - Deposits are included in the Total Paid value.
  - Surpluses are printed ONLY if the surplus amount is greater than zero.
  - If the student has mailings sent to multiple households, multiple statements will print.
  - If the option for Duplex Printing is selected, a single blank page may be added between statements to ensure different statements do not print on the same sheet of paper.If the results have voided fees, a No Record Found message displays.

Report Types and Examples

There are three different types of Fee Billing Statement Reports. Some options on the report editor are unique to the type of report you select.

Type	Description	Example

Type	Description	Example
Student	This option allows you to print billing statements for students in specific grade levels. In addition to the standard options, this report type includes the following additional options. • **Grade** or **Ad Hoc Filter** - You must select one of these options to narrow your report results. • **Active Students Only** - When this checkbox is marked, the report only includes students in the selected grade(s) or Ad Hoc filter that have or had an active enrollment as of the **Enrollment Effective Date**. • **Sort Options** - This field determines the order in which the statements print. Select **Student Name** to print the statements alphabetically by the student's last name. Select **Grade** to print the statements according the grade starting with the earliest grade selected. 	

Type	Description	Example
Person	This option allows you to print billing statements for any person entered in Campus even if they are not a student. You must select an **Ad Hoc Filter** to narrow your report results. In the example, the **Student Number** and **Grade** are blank since the fee being reported is for a person who is not a student. The Yearbook fee was assigned to a guardian.	
Household	This option allows you to print billing statements for households. When a person meets the criteria selected on the editor, members of their household that have fees that meet the report criteria are also included in the report. In addition to the standard options, this report type includes the following additional options. • **Grade** or **Ad Hoc Filter** - You must select one of these options to narrow your report results. Household members that are included may not be in the **Grade** or **Ad Hoc** Filter you select. This option determines the initial student or person for whom a billing statement is needed. • **Active Students Only** - When this checkbox is marked, the report only includes students in the selected grade(s) or Ad Hoc filter that have or had active an active enrollment as of the **Enrollment Effective Date**.	

Report Editor Field Descriptions

Field	Description
Which type of report would you like to run?	Identifies the type of billing statement you want to create. • Student • Person • Household See the previous section Report Types and Examples for more information.
Active Students Only	When this checkbox is marked, the report only includes students in the selected grade(s) or Ad Hoc filter that have or had an active enrollment as of the **Enrollment Effective Date**. This field is only available for Student and Household report types.

Field	Description
Include $0 Balance and Paid Fees Warning: Selection will result in a large amount of data.	When this checkbox is marked, the billing statements include • accounts that were previously assigned fees but now have a $0.00 balance. **AND** • lines for fees that are paid in full.
Which fees would you like to include in the report?	Campus provides a list of fees, even those marked as inactive, for which you can create a Fee Billing Statement. To report, the student or person must have an outstanding balance for that fee in the **School Year**(s) you select on the report editor.
Fee Assigned School Year	Identifies the calendar in which the fee(s) were assigned. A school year must be selected in order to generate the report.
Only include overdue fees	When this checkbox is marked, Campus only creates billing statements for fees that are NOT paid as of their due date.

Field	Description
Include Fees from All Schools	This checkbox is only available if your system administrator has assigned the **Fee Billing Batch All Schools** tool right to you. See the Tool Rights (Fees) article for more information. When this checkbox is marked, the billing statement includes fees assigned at schools other than the School/Calendar selected in the Campus toolbar. Keep in mind, if you are creating billing statements for Households, the statement will include household member's fees if the member was assigned the same fee(s) at other schools or if you are reporting All Fees.

Field	Description
Print Options	

Option	Description
Prepare report for duplex printing	When this checkbox is marked, a single blank page may be added between statements to ensure different statements do not print on the same sheet of paper.
Include 2nd Mailing Addresses	When this checkbox is marked, a billing statement prints for primary and secondary addresses.
Include Guardian's name	When this checkbox is marked, the guardian's name is included in the address.
Include Salutation	When this checkbox is marked, the text included in the Salutation text box prints.
Hide Comments	When this checkbox is marked, comments entered when the fee was assigned or paid are NOT printed on the billing statement. The following example demonstrates where comments print when this checkbox is *not* marked.
Address Font Size	Determines the size of the address when printed.

Field	Description
Notes	General comments from the school or district about the fees included on the billing statement. Notes entered in the text box are printed on page one of each billing statement. This note prints on ALL fee billing statements.
Notes Font Size	Determines how large the text for the notes is on the billing statement.
Report Generation	Two buttons are available for report generations: • **Generate Report** - displays the report instantly. • **Submit to Batch** - sends the report to the Batch Queue for generation at a specified time. This option is recommended when generating the report for a large number of students.