

# Fee Statements for Email and Family Access

1. Select  > **Administrative Access** > **Fee Management**.
2. Select **Fee Statement** under **Features**.
3. Under the **Fee Statement Run History** heading, click **Run Fee Statement** near the top right of the screen.
4. Complete the appropriate fields.

Required fields are identified with an asterisk. You must complete required fields before you can save your work.

- a. Verify the Date is correct.
- b. Enter the Run Description.
- c. Enter the Attachment Display Name.
- d. Check the box for Post to Family Access Portfolio if appropriate.
- e. Enter the *Statement Date* or click the  icon to choose a date using the calendar.
- f. Enter the *Due Date* or click the  icon to choose a date using the calendar.
- g. Verify the Total Amount Due Low or enter the correct low amount if necessary.
- h. Verify the Total Amount Due High or enter the correct high amount if necessary.
- i. Check the box for Include Customers With Zero Amount Due if appropriate.
- j. Check the box for Print Comments if appropriate.
- k. Check the box for Print Payments if appropriate.
- l. Check the box for Print Voided Records if appropriate.
- m. Check the box for Show Future Due Amounts if appropriate.
- n. Check the box for Window Envelope if appropriate.
- o. Verify the Header Image or enter the correct header image if necessary.
- p. Verify the Report Title or enter the correct report title if necessary.
- q. Verify the Report Footer or enter the correct report footer if necessary.
- r. Select the appropriate radio button for the Student Selection Type.

If you selected Range, the Student Filters and Advanced Filter - Student options display. Continue to the next sub-step.

If you selected Individual, the Select Students field displays. Skip to sub-step t.

- s. Build the Student Filters if appropriate.

This table is meant to be a reference for populating the Student standard filter. Any fields left blank populate all values. Entering information into the filter limits the results to those that match all of the criteria. If you wish to search for records that meet one set of criteria or a different set of criteria, you can add a new filter using the option at the bottom of the existing filter. This enables you to search for records that meet one of the filters' criteria. You can add up to 21 filters if needed.

Field Name	How the Field Works	Example
Student Processing Lists	Limits the students who are included based on the selected processing lists.	If you wish to include students from a processing list already filtered to only include the students on activity rosters for the spring and summer, you would enter that student processing list.
Active	Limits the students who are included in the filter based on their current enrollment status.	If you wish to include students with an active enrollment status, select Yes from the drop-down list.
Grad Year	Limits the students who are included in the filter based on the selected <i>Grad Years</i> .	If you wish to include students within a single grad year, you would enter that grad year.
Grade	Limits the students who are included in the filter based on the selected <i>Grade Levels</i> .	If you wish to include students in grade 11 and grade 12, you would enter those grade levels.
Student Type	Limits the students who are included in the filter based on the selected <i>Student Types</i> .	If you wish to include students with a designation of Regular, you would enter that student type.
Gender	Limits the students who are included in the filter based on the selected genders.	If you wish to include only female students, check the box to the left of F - Female.
Gender Identity	Limits the students who are included in the filter to the records with a certain Gender Identity code.	If you wish to only include students who are not male or female, you would enter the gender identity or identities.
Cross Entity Course Scheduling	Limits the students who are included in the filter based on whether they take <i>Courses</i> at other <i>Entities</i> in addition to their current entity.	If you wish to include students who have enrolled in a course or courses at an entity other than the current entity, select Yes from the drop-down list.
Graduated	Limits the students who are included in the filter based on graduation status.	If you wish to only include students who have not graduated, select No from the drop-down list.

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School	Limits the students who are included in the filter based on the selected schools.	If you wish to include students from a single school, you would enter that school.
Homeroom	Limits the students who are included in the filter based on the selected <i>Homerooms</i> .	If you wish to include students in certain homerooms, you would enter those homerooms.
Advisor	Limits the students who are included in the filter based on the selected advisors.	If you wish to include students who have John Smith as an advisor, you would enter that name.
Activity	Limits the students who are included in the filter based on the selected <i>Activities</i> .	If you wish to include students who play tennis, you would enter that activity.
Calendar	Limits the students who are included in the filter based on the selected calendars.	If you wish to include students attached to a particular calendar, you would enter that calendar.
Graduation Requirement Year	Limits the students who are included in the filter based on the selected <i>Graduation Requirement Years</i> .	If you wish to include students within a particular range of graduation requirement years, enter the first year in the Low field and the last year in the High field.
Default Entity	Limits the students who are included in the filter based on the selected default <i>Entity</i> .	If you wish to include students whose default entity is 101, you would enter entity 101.
Student Number	Limits the students who are included in the filter based on the selected student numbers.	If you wish to include students with particular student numbers, you would enter those numbers.
Last Name	Limits the students who are included in the filter to the students whose last names fall between the low and high values entered.	If you wish to only include students whose last names begin with the letter A through the letter F, enter A in the Low field and FZZZ in the High field.
First Name	Limits the students who are included in the filter to the students whose first names fall between the low and high values entered.	If you wish to only include students whose first names begin with the letter G through the letter P, enter G in the Low field and PZZZ in the High field.
Middle Name	Limits the students who are included in the filter to the students whose middle names fall between the low and high values entered.	If you wish to only include students whose middle names begin with the letter Q through the letter Z, enter Q in the Low field and ZZZZ in the High field.
Method Of Instruction	Limits the students who are included in the filter based on the selected <i>Method of Instruction Offering</i> codes.	If you wish to include students attached to a particular method of instruction, you would enter that Method of Instruction Offering code.
Primary Language	Limits the students who are included in the filter based on their primary language of use.	If you wish to view students with a particular primary language in order to provide translated messages, you would enter that language.
Home Language	Limits the students who are included in the filter based on the language used in their home.	If you wish to view students with a particular home language in order to provide translated messages, you would enter that language.
Students	Limits the students who are included in the filter to the selected students.	If you wish to include specific students, you would enter the appropriate student names.

If you want to filter by other criteria, you can build the Advanced Filter.

Skip to sub-step u.

- t. Enter one or more students in the Select Students field or click the  icon to choose from the drop-down list.
- u. Click **Next** near the top left of the screen.
- v. Uncheck the box for each student you do not wish to include in the process.

5. Click **Run Process** near the top left of the screen.