

Student Assessment Report

The Student Assessment Report provides detailed Accounts Receivable activity by term for tuition and fee analysis. Users can define the reporting range using the Start Term and End Term prompts and further refine results by Charge Category, Charge Detail, Finance Fund, and Finance Account.

The report displays the term code and description, charge detail and description, transaction charge amount, payments, and resulting balance. It is designed to assist with reviewing, reconciling, and analyzing tuition and fee activity at the student level.

Report Prompts

1. Start Term (Optional)

Identifies the first academic term to include in the report.

2. End Term (Optional)

Identifies the last academic term to include in the report. Only transactions within this term range will be included in the results.

3. AR Charge Category (Optional)

Each Detail Code is assigned a two- or three-letter Category Code that groups similar types of charges. If a department uses multiple Detail Codes across several funds, running the report by Category Code can simplify the process and provide a broader view of related transactions. Use the same selection method as above to locate and move the desired Category Code to the Selected box.

4. AR Charge Detail (Optional)

A four-character detail code is assigned to each charge. The codes typically correspond to a single Fund, Account, and Organization. The Detail Code option allows users to report on a specific charge type. For example, when a fund is used for multiple charges, entering the detail code limits the report to activity related only to that specific charge.

5. Finance Funds (Optional)

In the Search for box, type part of the fund name or number. As you type, the Available box will filter and display matching results. Select the desired fund and move it to the Selected box on the right.

Student Assessment Report

6. Finance Accounts (Optional)

If your department uses specific account codes to designate a type of activity, this parameter can be used to narrow the report accordingly. The Account Code tracks activity within Funds and can be used in conjunction with the Organization or Fund.

Select Run Report, located in the bottom left corner of the screen, to generate the report.

Selection Tip

To select any fund, category, or other element:

In the Search for box, type part of the name or code.

The Available box will filter and display matching results.

Click once to highlight the desired item, then double-click to move it into the Selected box.

- Alternatively, highlight the item and click the single right arrow (>) button.
- Confirm that your selection appears in the Selected box before proceeding.

Note: By default, the Match case box is checked. If the case does not match exactly, items will not populate in the Available box. You may need to uncheck Match case to broaden your search results

Exporting Data

To export data, select Report Home from the top left navigation bar, then choose Export. Pick your preferred format, such as PDF, Excel, CSV, HTML, or Plain text. Once selected, the report will appear in your Downloads.

Saving your report

To save the report, select Report Home and then choose Save. This will save the report with the exact parameters used. There is also an option to schedule the report to run automatically as often as needed