Patron Balance

Last Modified on 06/25/2026 1:15 pm CDT

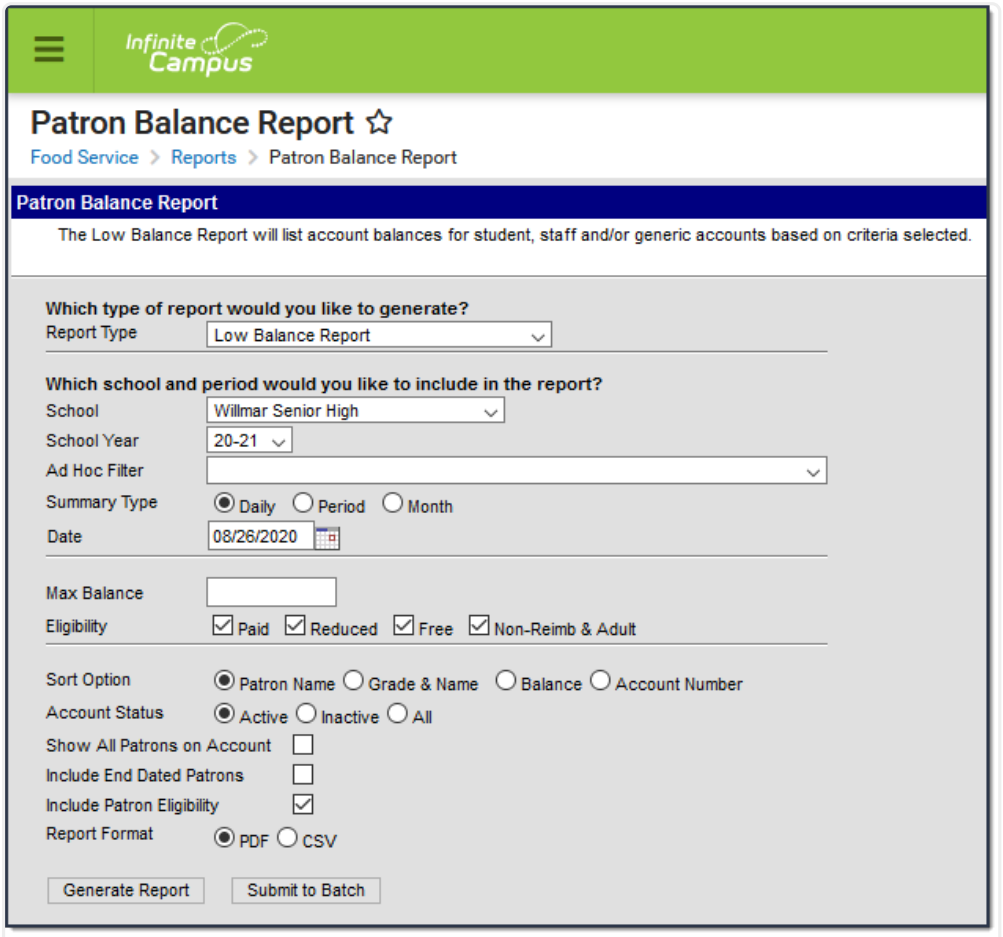
Tool Search: Patron Balance Report

This functionality is only available to customers who have purchased Campus Point of Sale as add-on functionality.

The Patron Balance Report allows users to generate a report of account balances for student, staff and/or generic accounts as well as create and generate account balance letters for distribution to patron parents/guardians.

This article includes the following topics:

- Generating the Low Balance Report
- Low Balance Report Column Descriptions
- Generating Low Balance Letters
- Understanding Low Balance Letters
- Creating Low Balance Letter Templates



Patron Balance Report Editor Example

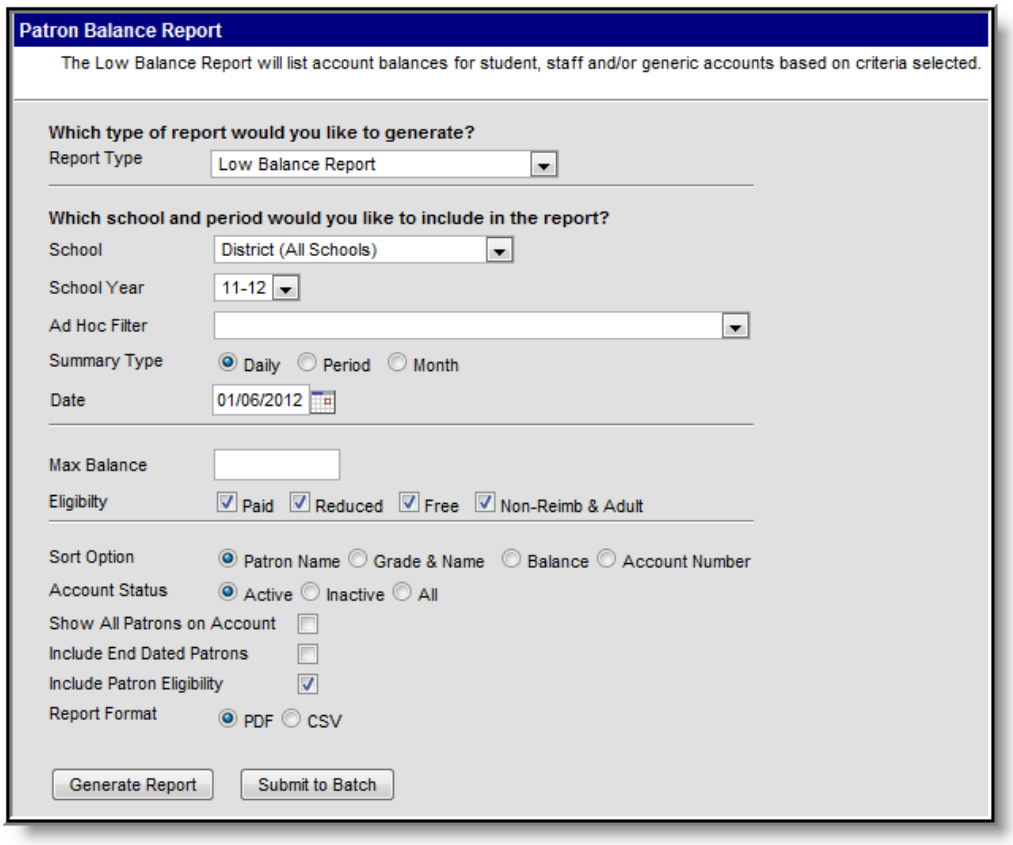
See the Food Service Reports Tool Rights article for information on rights needed to use this and other food service reports.

Users should inactive accounts, remove PINs and zero-out balances using the Account Management Wizard for students and staff who will not be returning the next school year. This ensures the most accurate results for accounts being included within Patron Balance reports and letters.

Low Balance Report

The Low Balance Report lists account balances for student, staff and/or generic accounts based on criteria selected on the report editor.

If any staff in the district have a District Employment record only, the School selected has to be District (All Schools) in order for them to be included within report results. If an account has only patron(s) without employment or enrollment records, they will only appear in the report when a Location School is set on the Account Info tool and the specific School is selected on the report editor. Location School cannot be set to Default and School criteria cannot be District (All Schools) when reporting results for generic accounts.



Low Balance Report Editor

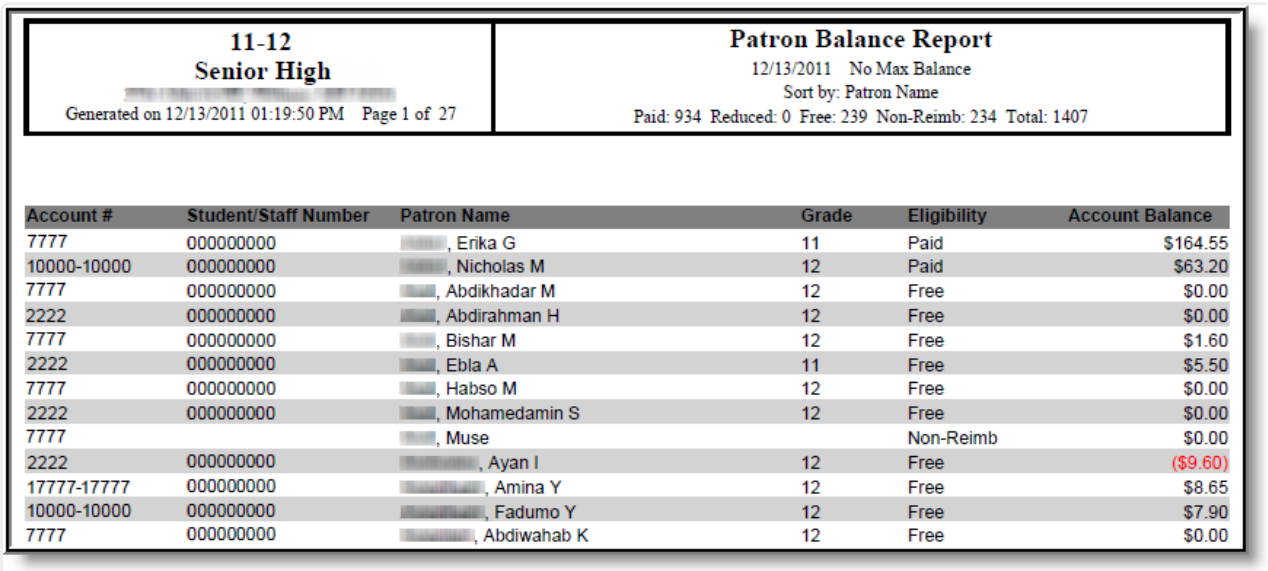
Generating the Low Balance Report

1. Select a **Report Type** of Low Balance Report.
2. Select the **School** reporting data.
3. Select the **School Year**.
4. Select an **Ad Hoc Filter**. (optional)
5. Select the **Summary Type**. See the toolle below for more information.
6. Enter the **Date** in which to pull the posted balance and Eligibility selected.
7. Enter a **Max Balance** (optional)
8. Mark which patron **Eligibility(s)** are included within the report. See the toolle below for more information.
9. Select a **Sort Option**.
10. Limit results based on the patron's **Account Status**. See the toolle below for more information,
11. Mark the **Show All Patrons on Account** checkbox to report all patrons on a multi-patron account when at least one patron on the account meets the report criteria selected.
12. Mark the **Include End Dated Patrons** checkbox to include patrons with end dated enrollment or employment records.
13. Mark the **Include Patron Eligibility** checkbox to include patron eligibility information within the report.
14. Select the **Report Format**.
15. Click the **Generate Report** button OR the **Submit to Batch** button.

Field	Description
Report Type	The type of report being generated. Select "Low Balance Report".
School	Limits the results to patrons with enrollment or employment records at the selected school(s), or patrons who have a Location School set on their account at the selected school(s).
School Year	Limits the results to student patrons with enrollment in the school year chosen.
Ad Hoc Filter	Filters results based on fields within the Ad hoc filter selected. (Optional) Ad hoc filters are created using the Filter Designer tool.
Summary Type	Determines the Summary Type: • **Daily** - Reports the posted balance on the day entered. • **Period** - Reports the posted balance on the first date entered and the posted balance on the last day entered. • **Month** - Reports the posted balance on the first day of the month and last day of the month selected.
Date	Reports account balances based on the date transactions are posted to the account.
Max Balance	Limits results to accounts with a balance equal to or less than the amount entered.
Eligibility	Limits report results to patrons with the meal status(es) selected as of the School Year and Date entered on the report editor.
Sort Option	Determines how report results are sorted. Options include: • **Patron Name** - Sorts results by patron name for the patron on the account with a last name, first name combination closest to A (based on patrons who best meet criteria selected). • **Grade & Name** - Sorts results based on the patron on the account with the lowest sequenced grade ascending, then by last name, first name ascending. Sequenced grade means the Sequence Number assigned to the grade on the Grade Levels tool. • **Balance** - Sorts results based on account balance amount in descending order. • **Account Number** - Sorts results based on Account Number in ascending order.
Account Status	Limits results based on account status. • **Active** - Only accounts with the Active checkbox marked on the Account Info tool are reported. • **Inactive** - Only accounts with the Active checkbox unmarked on the Account Info tool are reported. • **All** - All accounts are reported, regardless of whether or not the Active checkbox is marked on the Account Info tool.

Field	Description
Show All Patrons on Account	When marked, the report will list all patrons in a multi-patron account when at least one patron on the account meets the report criteria selected. this includes patrons on the account without end dates on their enrollment or employment records.
Include End Dated Patrons	When marked, patrons with end dates entered on their enrollment record in the School Year selected, or staff patrons with ended employment records will appear on the patron list.
Include Patron Eligibility	When marked, patron eligibility is included within report results.
Report Format	The format of the generated report.
Generate Report Submit to Batch	Users have the option of submitting a report request to the batch queue by clicking **Submit to Batch** instead of **Generate Report**. This process allows larger reports to generate in the background, without disrupting the use of Campus. For more information about submitting a report to the batch queue, see the Batch Queue article.

Low Balance Report Column Descriptions



11-12
Senior High
Generated on 12/13/2011 01:19:50 PM Page 1 of 27

Patron Balance Report
12/13/2011 No Max Balance
Sort by: Patron Name
Paid: 934 Reduced: 0 Free: 239 Non-Reimb: 234 Total: 1407

Account #	Student/Staff Number	Patron Name	Grade	Eligibility	Account Balance
7777	000000000	, Erika G	11	Paid	$164.55
10000-10000	000000000	, Nicholas M	12	Paid	$63.20
7777	000000000	, Abdikhadar M	12	Free	$0.00
2222	000000000	, Abdirahman H	12	Free	$0.00
7777	000000000	, Bishar M	12	Free	$1.60
2222	000000000	, Ebla A	11	Free	$5.50
7777	000000000	, Habso M	12	Free	$0.00
2222	000000000	, Mohamedamin S	12	Free	$0.00
7777		, Muse		Non-Reimb	$0.00
2222	000000000	, Ayan I	12	Free	($9.60)
17777-17777	000000000	, Amina Y	12	Free	$8.65
10000-10000	000000000	, Fadumo Y	12	Free	$7.90
7777	000000000	, Abdiwahab K	12	Free	$0.00

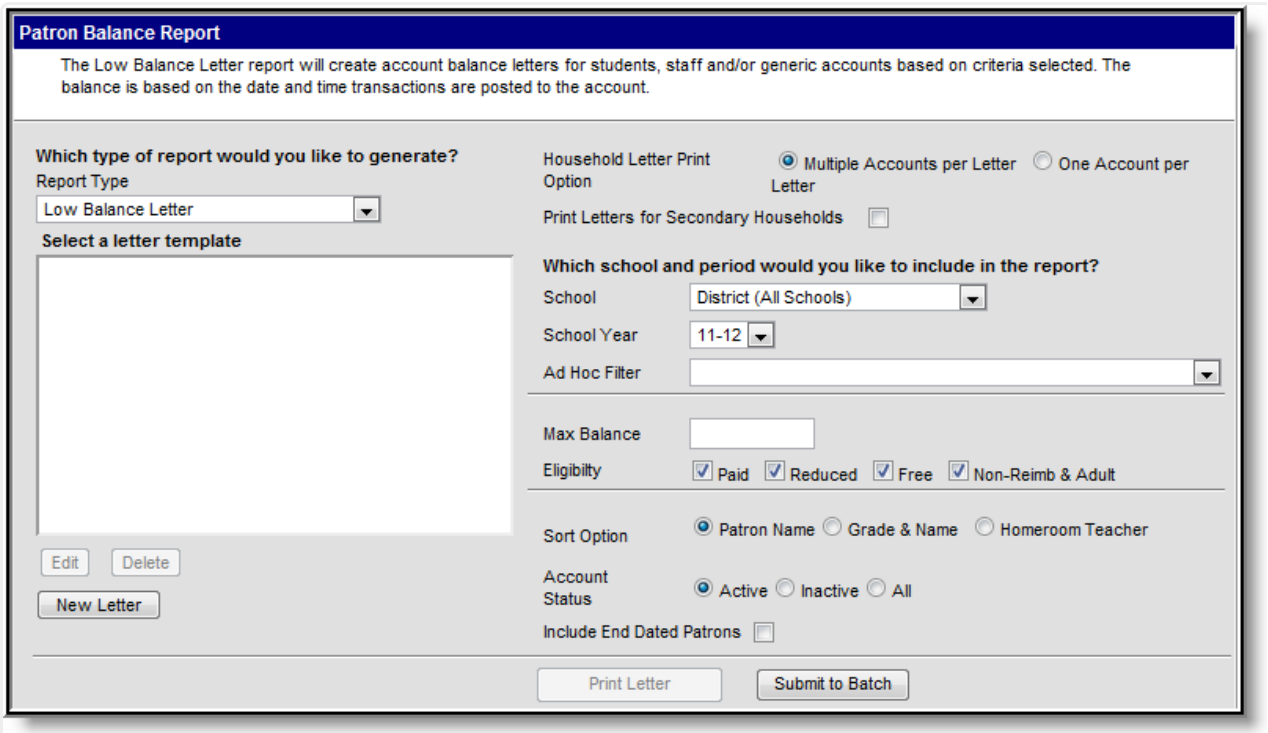
Low Balance Report - PDF Format

The following table describes each report column.

Column	Description
Account#	The patron's account number.
Student/Staff Number	The student or staff number of the patron.
Patron Name	The name of the patron.
Grade	The grade the patron is enrolled in as of date entered on the report editor.
Eligibility	The patron's Food Service eligibility. This column is only reported if the **Include Patron Eligibility** checkbox is marked on the report editor.
Account Balance	The patron's account balance as of the date entered on the report editor. Balances in red and parentheses indicate the amount is a negative value.

Low Balance Letter

The Low Balance Letter report creates letters about student, staff and/or generic account balances for use in informing a parent(s), guardian(s) and/or other appropriate parties about specific patron account balances.



Low Balance Letter Editor

Low Balance Letter Logic

The following logic is used when generating Low Balance Letters:

- Letters will only include the current balance as of the date the letter is generated. The balance

is based on the date and time transactions are posted to the account.
- A household must have the Mailing Flag checked on the Addresses tool. If no address is marked as Mailing for the household, the letter will print without an address.
- Within a household, a student must have at least one person marked with the Guardian and Mailing flag on the Relationships tool. If no adult has both checkboxes marked, the addressee will be the patron(s) on the account.
- If an account has patron(s) without employment or enrollment records, letters will only generate if a Location School is set on the Account Info tool and the specific School is selected on the letter editor. Location School cannot be set to Default and the School field on the letter editor cannot be set to District (All Schools).
- Letters will not be sent to anyone marked with a relationship of Guardian and Mailing who are not part of the student(s)' Primary or Secondary household.
- When printing letters, there is a limit of addresses that will report. Up to 6 addresses per household, 2 lines, 3 per line will report. If there are more than 6 adults in a household with the Guardian and Mailing checkboxes checked for a patron, the letter will not report all guardians.
- When printing generated letters, users should set Page Scaling settings to Fit to Printable Area or Shrink to Printable Area to ensure address will line up in a #10 window envelope.
- If a student is the guardian for children in the household and those children do not have enrollment records, the children may appear as addressees since Campus cannot distinguish between student and adult Guardian/Mailing relationships.

Generating Low Balance Letters

1. Select a **Report Type** of Low Balance letter.
2. Select a letter template. See the Creating a New Letter Template section below for more information about creating/editing letter templates.
3. Select a Household Letter Print Option.
    - Select the **Multiple Accounts per Letter** radio button to have all accounts associated with a household grouped into one letter. For family accounts, all patrons on an account will list in the letter, even if only one patron the account is associated with the household. See the toolle below for detailed information about scenarios which impact this option.
    - Select the **One Account per Letter** radio button to have a separate letter generated for each account associated with the household.
4. Mark the **Print Letters for Secondary Household** checkbox to generate letters for all appropriate guardians for accounts where at least one patron is marked as a Secondary Member on the Members tool.
5. Select the **School** reporting data.
6. Select the **School Year**.
7. Select an **Ad Hoc Filter**. (optional)
8. Enter a **Max Balance**. (optional) Patron accounts must have less than or equal to this amount in order to be included within generated letters.
9. Mark which patron **Eligibility(s)** are included within the report.
10. Select a **Sort Option**. See the toolle below for more information.
11. Limit results based on the patron's **Account Status**. See the toolle below for more information

12. Mark the **Include End Dated Patrons** checkbox to include patrons with end dated enrollment or employment records as of the Summary Date entered.

13. Select the **Print Letter** button OR the **Submit to Batch** button.

Users have the option of submitting a report request to the batch queue by clicking **Submit to Batch** instead of **Generate Report**. This process allows larger reports to generate in the background, without disrupting the use of Campus. For more information about submitting a report to the batch queue, see the Batch Queue article.

When printing generated letters, users should set Page Scaling settings to Fit to Print Area or Shrink to Printable Area to ensure address will line up in a #10 window envelope.

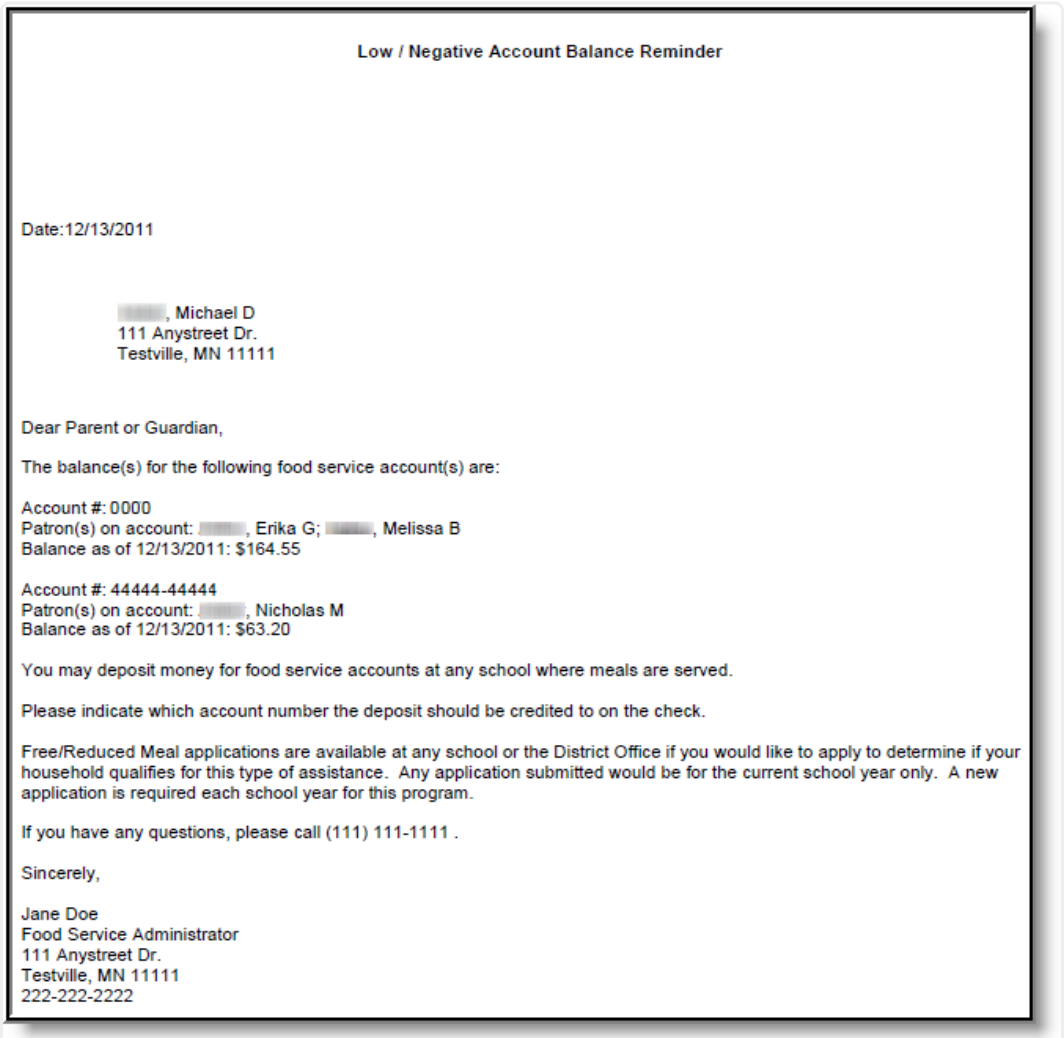
Field	Description
Report Type	The type of report being generated. Select "Low Balance Letter".
Household Letter Print Option	Determines how accounts are displayed on the letter. • **Multiple Accounts per Letter** - All accounts associated with a household are grouped into one letter. For family accounts, all patrons on an account will be listed in the letter, even if only one patron on the account is associated with the household. The letter will be addressed to all common person(s) marked as Guardian and Mailing for the patron(s) in a household. If a household has a mom with her own children and a step-dad with his own children, the option will address a letter to both mom and step-dad and have all accounts listed (assuming mom and step-dad are marked as Guardian/Mailing for at least one patron on each account). • **One Account per Letter** - A separate letter will be generated for each account associated with the household.
Print Letters for Secondary Households	If marked, letters will generate for appropriate guardians for accounts where at least one patron is marked as a Secondary Member on the Members tool.
School	Limits the results to patrons with enrollment or employment records at the selected school(s), or patrons who have a Location School set on their account at the selected school(s).
School Year	Limits the results to student patrons with enrollment in the school year chosen.
Ad Hoc Filter	Filters results based on fields within the Ad hoc filter selected. (Optional) Ad hoc filters are created using the Filter Designer tool.
Max Balance	Limits letters generated to accounts with a balance equal to or less than the amount entered in this field.

Field	Description
Eligibility	Limits letters generated to accounts including any patrons with the meal status(es) selected as of the Summary Date.
Sort Option	Determines how letter information is sorted. • **Patron Name** - Sorts results by patron name for the patron on the account with a last name, first name combination closest to A (based on patrons who best meet criteria selected). For example, if an account has patrons with a Free and a Paid eligibility but an Eligibility of Paid is selected on the letter editor, results will sort based on the Paid patron's last name. • **Grade & Name** - Sorts results based on the patron on the account with the lowest grade ascending, then by last name, first name ascending. • **Homeroom Teacher**- Sorts results based on the patron on the account with the lowest grade assigned to a homeroom and then by that patron's last name alphabetically (for multi-patron accounts). For accounts containing multiple patrons with the same last name, letters are sorted based on the Primary Teacher listed on the Section tool alphabetically. Homeroom Teacher will only work for students in a school assigned to a homeroom as of the day the letter is generated. If this option is selected and school is between Terms where students are not in a homeroom on the day entered on the letter editor, generated letters will report as No Homeroom Assigned. If a School Year is selected that is in the past or future, this option will not sort past or future homeroom assignments.
Account Status	Limits results based on account status. • **Active** - Only accounts with the Active checkbox marked on the Account Info tool are reported. • **Inactive** - Only accounts with the Active checkbox unmarked on the Account Info tool are reported. • **All** - All accounts are reported, regardless of whether or not the Active checkbox is marked on the Account Info tool.
Include End Dated Patrons	When marked, patrons with end dates entered on their enrollment record in the School Year selected or staff patrons with ended employment records will appear on generated letters.
Print Letter Submit to Batch	Users have the option of submitting a report request to the batch queue by clicking **Submit to Batch** instead of **Generate Report**. This process allows larger reports to generate in the background, without disrupting the use of Campus. For more information about submitting a report to the batch queue, see the Batch Queue article.

Understanding Low Balance Letters

Low Balance Letters are displayed based on the letter template selected. The image below is an

example of a generated letter.



Low / Negative Account Balance Reminder

Date:12/13/2011

, Michael D
111 Anystreet Dr.
Testville, MN 11111

Dear Parent or Guardian,

The balance(s) for the following food service account(s) are:

Account #: 0000
Patron(s) on account: , Erika G; , Melissa B
Balance as of 12/13/2011: $164.55

Account #: 44444-44444
Patron(s) on account: , Nicholas M
Balance as of 12/13/2011: $63.20

You may deposit money for food service accounts at any school where meals are served.

Please indicate which account number the deposit should be credited to on the check.

Free/Reduced Meal applications are available at any school or the District Office if you would like to apply to determine if your household qualifies for this type of assistance. Any application submitted would be for the current school year only. A new application is required each school year for this program.

If you have any questions, please call (111) 111-1111 .

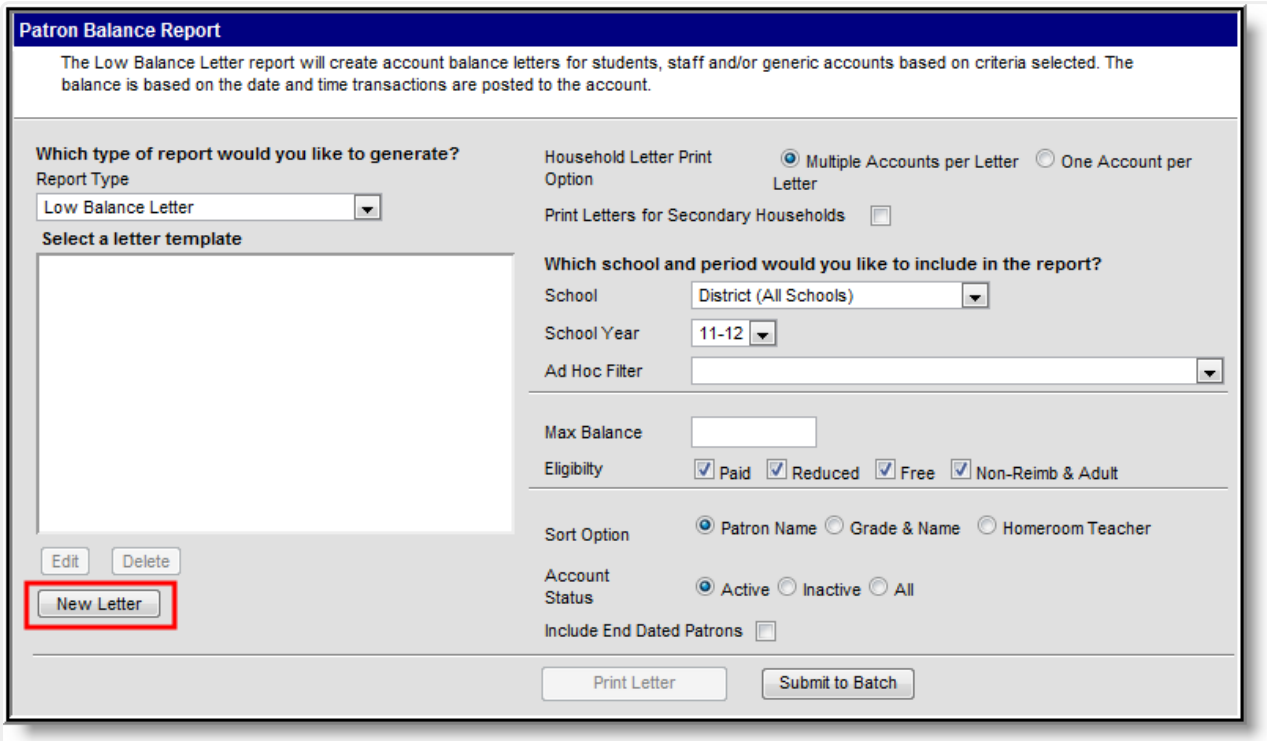
Sincerely,

Jane Doe
Food Service Administrator
111 Anystreet Dr.
Testville, MN 11111
222-222-2222

Example of a Low Balance Letter

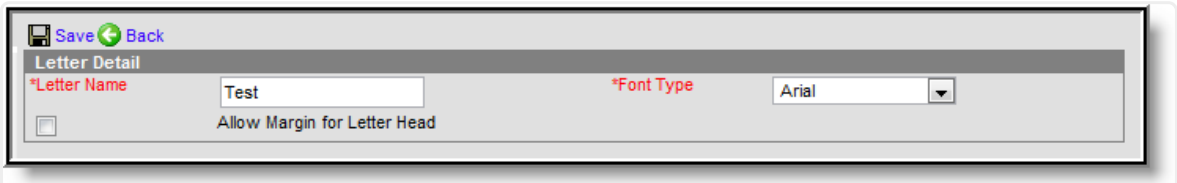
Creating Low Balance Letter Templates

Before Low Balance Letters can be generated, letter templates must be created. Letter templates serve as the framework for each letter generated where criteria entered on the Low Balance Letter editor determines the data populated within each letter section. Once a template is created, users can continue to generate the same letter while reporting different data based on criteria entered on the letter editor.



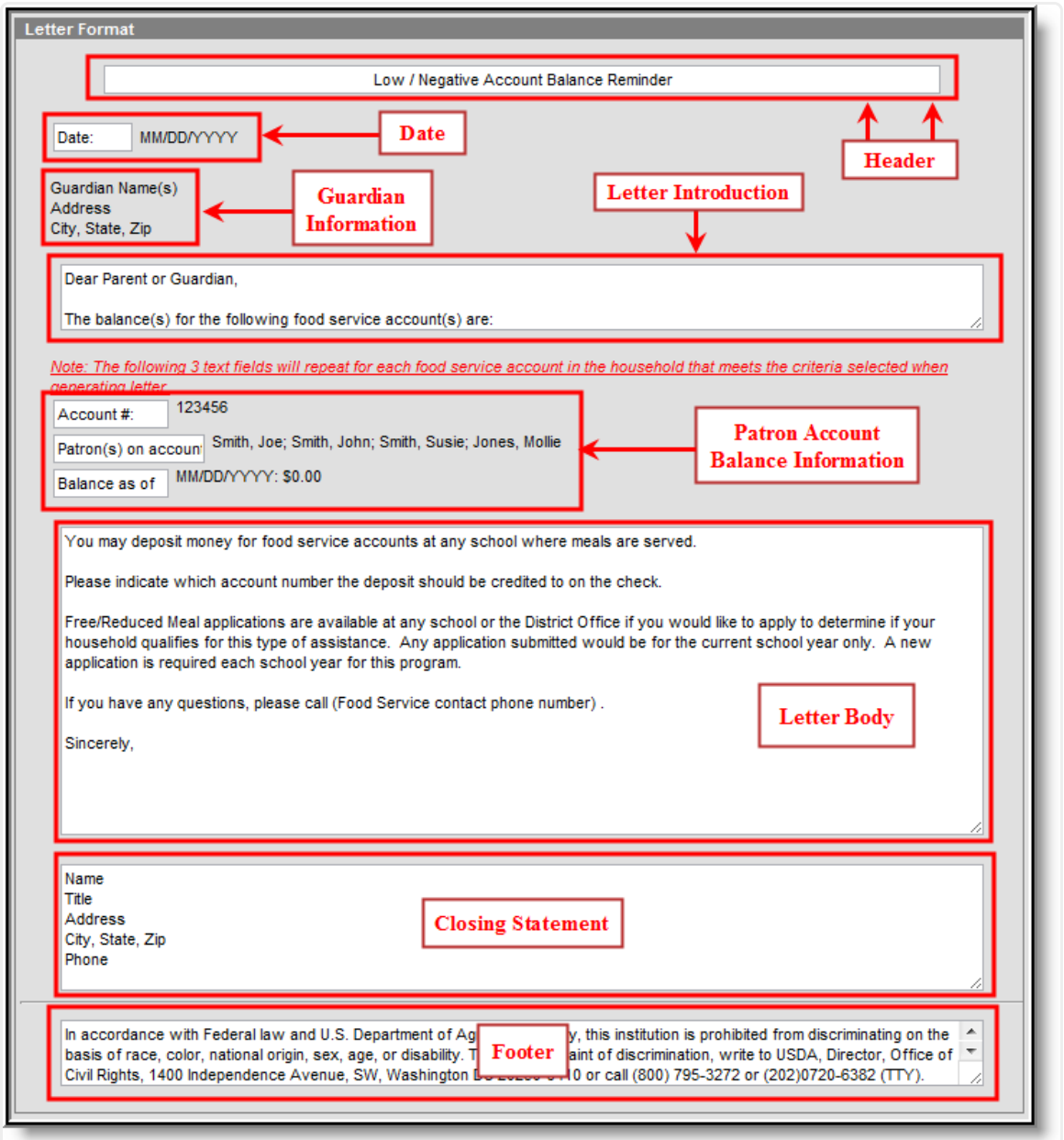
Creating a New Letter Template

To create a new letter template, select the **New Letter** button. The Letter Detail and Letter Format editors will appear.



Letter Detail

Enter the **Letter Name** and select the **Font Type** (Arial or Times New Roman). To include an additional 1" header margin, mark the **Allow Margin for Letter Head** checkbox.



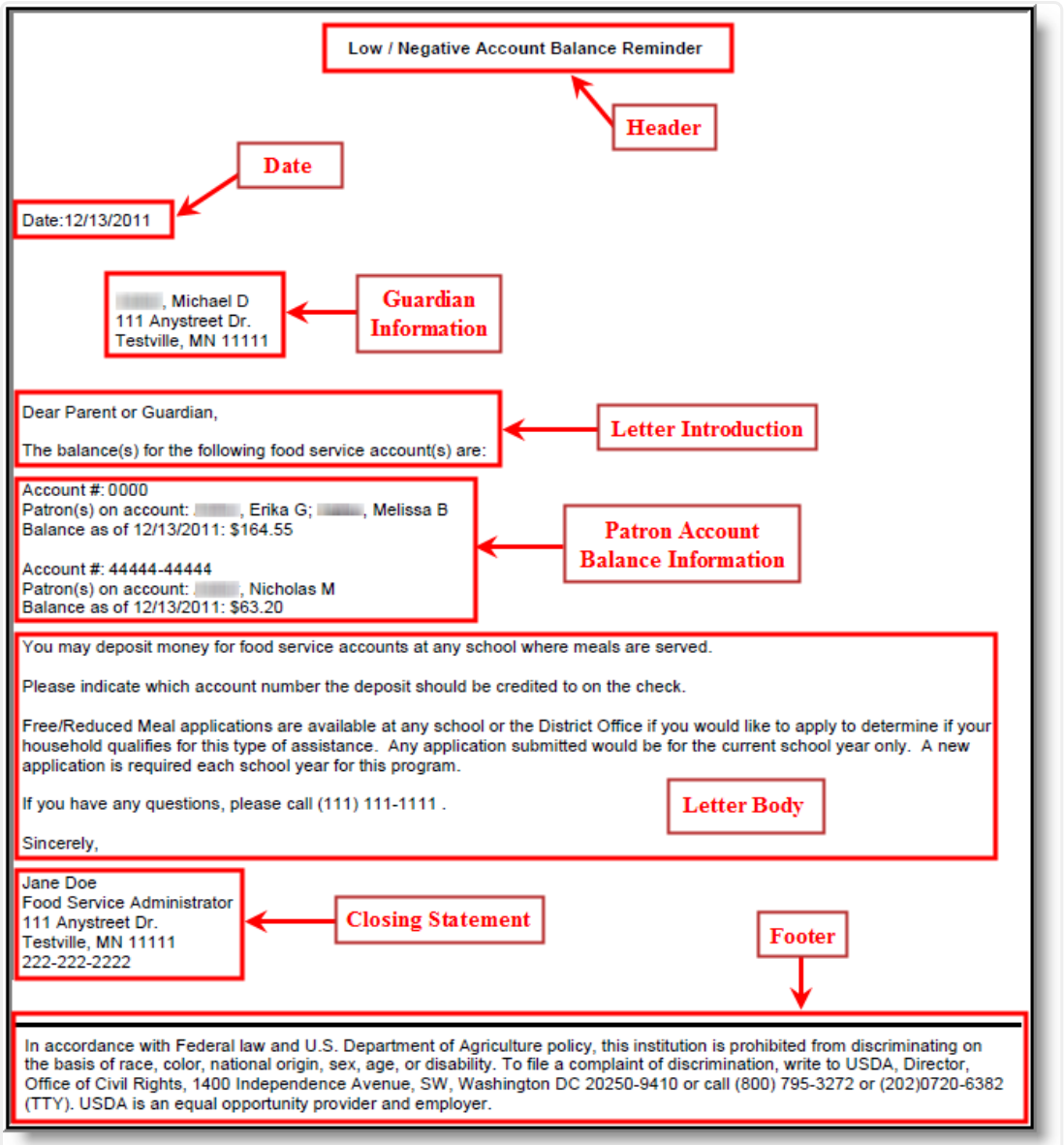
Letter Format

Each field within the Letter Format editor contains pre-populated information. This information was included to provide a common letter structure and may be deleted/edited.

1. Enter a **Header** for the letter.
2. Enter text that appears before the **Date**. You cannot remove the date from populating in this section, only determine what text displays before it.
3. Guardian Information cannot be modified.
4. Enter the **Letter Introduction**.
5. Enter what text is displayed before the patron account number(s), patron account names and account balance fields in the **Patron Account Balance Information** section.
6. Enter the **Letter Body**.
7. Enter a **Closing Statement**.
8. Enter a **Footer** for the letter.

The footer automatically includes the USDA non-discrimination clause as of December 2011. Users are responsible for maintaining this clause to match changes and updates made by the USDA.

9. Select the **Save** icon. The letter template is now saved.



Example of a Low Balance Letter

The image above is an example of a generated Low Balance Letter. Users should match each section of the Letter Format editor to each section in this example for a better understanding of how and where each field is displayed on generated letters.