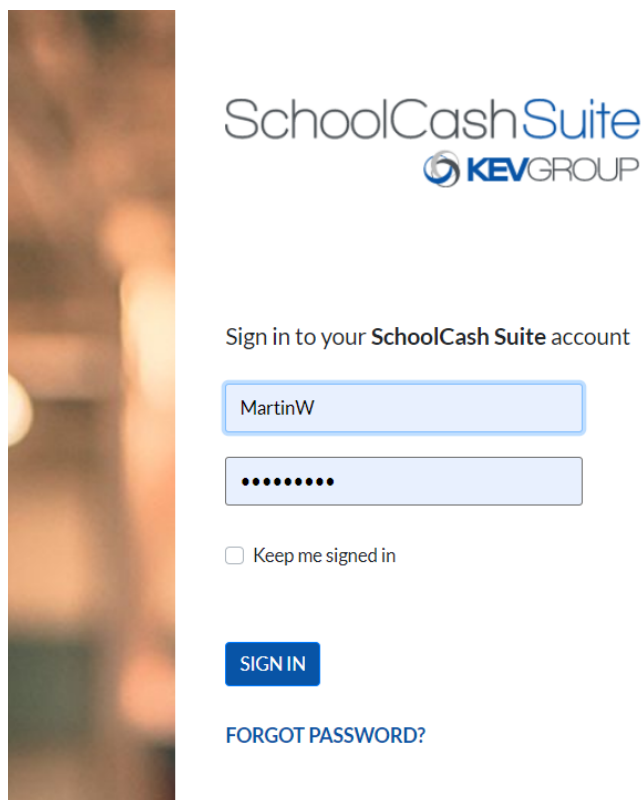# How to use the Teacher Reporting feature

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KEV's Teacher Reporting feature enables Teachers and Sponsors to stay on top of payment and category/account information for all the fees, items, and categories/accounts they are responsible for. The reporting feature allows the school staff to generate reports that contain up-to-date information about payment updates, item order choices, forms responses, sponsor fund balances, etc. as and when they need to.

No more going down to the office and coordinating with the school Bookkeepers and secretaries to get this information. Focus on what matters most to you, the school, and the students.

Step 1: Login to SchoolCash using your username and password. If you don't have one yet, contact your school support staff.

Step 2: If you are a Teacher, select 'Reports' under 'Catalog' to go into the Reports section. Then select the item that you want to generate a report for. You can optionally choose to filter your items by status such as Approved, Live, Expired, etc.

Step 3: To generate reports, follow the steps outlined on the screen. You can generate the reports or export them in various formats as needed.

You can generate the following reports.

- <u>Activity Report</u>: This gives the payment statuses of the selected items (one or more) and tells you which students have paid for the item and which payments are outstanding. It also tells you which students have partially paid, have been refunded, rejected, waived, or if payments are scheduled. All of these are optional filters in the report. You can also generate the Activity Report with all these payment statuses to get the full picture.

Chess Club
Chestnut High School

16 Students Found
6/22/2023

| | Student Information | | | | | | | Purchase Information |
Student Name	Homeroom	Paid	Refund in Progress	Refunded	Owing	Waived	Price	Payments
Aldrich, Nancy	310 Edgerton	$0.00	$0.00	$0.00	$6.00	$0.00	$6.00	
Aldrich, Nancy	310 Edgerton	$6.00	$0.00	$0.00	$0.00	$0.00	$6.00	$6.00 - Check - 05/15/23
Allen, Zachary	418 Westercamp	$6.00	$0.00	$0.00	$0.00	$0.00	$6.00	$6.00 - Check - 04/11/23
Anibire, Samuel	434 Schultz	$0.00	$0.00	$0.00	$6.00	$0.00	$6.00	
Argo, Ryan	232 Ellis	$6.00	$0.00	$0.00	$0.00	$0.00	$6.00	$6.00 - Check - 03/29/23
Azelborn, Adam	232 Ellis	$6.00	$0.00	$0.00	$0.00	$0.00	$6.00	$6.00 - Check - 03/23/23
Bartz, Helen	220 Jans	$6.00	$0.00	$0.00	$0.00	$0.00	$6.00	$6.00 - Cash - 01/27/23
Beman, Amira	216 Cole	$0.00	$0.00	$0.00	$6.00	$0.00	$6.00	
Bennett, Sydney	404 Smith	$0.00	$0.00	$0.00	$6.00	$0.00	$6.00	
Bishop, Amanda	406 Jones	$0.00	$0.00	$0.00	$6.00	$0.00	$6.00	
Brant, Ian	422 Schott	$0.00	$0.00	$0.00	$6.00	$0.00	$6.00	
Brockman, VonJahniqah	222 Perkins	$0.00	$0.00	$0.00	$6.00	$0.00	$6.00	
Brown, Bailey	216 Cole	$6.00	$0.00	$0.00	$0.00	$0.00	$6.00	$6.00 - Cash - 04/11/23
Burgess, Caitlin	234 Hampton	$0.00	$0.00	$0.00	$6.00	$0.00	$6.00	
Clark, Eli	230 Anderson	$6.00	$0.00	$0.00	$0.00	$0.00	$6.00	$6.00 - CreditCard (Online) - 03/07/23
Henry, Allison	232 Ellis	$0.00	$0.00	$0.00	$6.00	$0.00	$6.00	
Chess Club totals		$42.00	$0.00	$0.00	$54.00	$0.00	$96.00	
TOTALS		$42.00	$0.00	$0.00	$54.00	$0.00	$96.00	

- **Option Report**: This report gives you the information of the order choices/options selected by the parent/student when paying for the item. This will only be available for items if there are choices included in the item.

6/22/2023

Spirit Wear - Tshirt
Chestnut High School

| Option Information | | Student Information | Purchase Information | | |
Option Name	Choice Name	Student Name	Homeroom	Quantity	Choice Cost
Shirt Size	Small				
		Clark, Eli	230 Anderson	1	$0.00
			TOTAL	1	$0.00

- **Forms Report/Custom Forms Report**: *This report is only available if the district has SchoolCash Forms enabled.*

This report gives you all the responses that the parent/student filled in the form that was attached to the selected items. At this time, this report is only available as an excel report that can be exported. In the future, you will be able to export this as a printable pdf report as well as generate this report within the product.

P	Q	R	S	T
Student Name Last Name (Name)	Student Name Student Id (Name)	Phone (Phone)	Do you want to be a volunteer for this trip? (Dropdown)	Choose a date when you are available for preparations? (D
Allen	ABC1234	444-555-6666	Yes	2023-01-26 12:00 AM
Allen	EFG789	111-222-3333	Yes	2023-01-30 12:00 AM
Aldrich	EFG790	111-222-3334	Yes	2023-01-30 12:00 AM
Aldrich	EFG791	111-222-3335	Yes	2023-01-30 12:00 AM
Aston	EFG792	111-222-3336	Yes	2023-01-30 12:00 AM

Step 4: If you are an account/activity sponsor or a fund category manager, you can go into the Categories module to generate reports to easily check balances and view and export a detailed transaction history for your assigned fund categories.

You can select a fund category and generate detailed transaction report for that fund. There are various time period filters like 'Most Recent', 'Last Month', 'This Month' and 'This Year' that you can choose here or choose to do an 'Advanced Search' which will have even more filters like 'Transaction Type', 'Amount', 'Vendor Supplier', 'Custom Date', etc.

Advanced Search

Filter by:

Transaction Type

Deposits/ other credits ▼

Start	End
_____ 🗓	_____ 🗓

Return Results Matching:

Money Handed in By

Wilson, Mary ▼

Amount

10

CANCEL		SEARCH

Disclaimer

This feature will be available for all districts that have Teachers/Sponsors in SchoolCash and have opted in to use this feature. For more questions about getting this feature enabled, please contact your CSM.