

Automatic assessment of periodic fees

Report Description:


This report will automatically assess the periodic fees. You can program the report to stop calculating fees as of the scheduled end date and start calculating on the requirement start date, if desired.

Running the Report:

You can manually run this report if for some reason it doesn't automatically run as a scheduled job. Enter the date you wish to assess fees.

Automatic Assessment Of Periodic Fees

Enter report criteria and press "Submit"

Assessment date:* 

This should be set up as a scheduled job.

Job name: [ASSESS](#)
Frequency:* ▾
Report name:*
Run date offset:*
Run date range:* ▾
Run time:

The Report:

The report does not produce any output, it simply assesses the fees.

- Requirement transactions				<input type="checkbox"/> Descending	Top	Options
Date	Type	Number	Memo	Amount		
11/1/2018 12:00 AM	Assessment		Automatic assessment	\$15.00		

Where the data comes from:









This report looks at the requirements that have the assessment frequency section filled in. The report runs and assesses the fees based on that frequency.

If you have a date in the scheduled end date and you have programmed the “[stopAfterScheduledEnd](#)” with yes, the fee will stop being assessed as of that scheduled end date.

You can either assess fees based on the start date of the requirement or on the first day of the month. This is determined by the “[useStartDateForCalculations](#).” For example, if you run the report daily, the monthly fees will either be assessed on the first day of the month or on the requirement start date.

For a fee to be assessed it must exist when the report runs. A person who gets put on the program 10/2 won't have fees assessed when the report runs on the first day of the month. If you don't use the start date for the calculations, they won't owe any fees until 11/1. If they are released from the program on 10/29 they will never have a monthly fee assessed.

If you do use start date for calculations, you must tell it what date to start doing that by setting up the “[useStartDateAsOf](#)” report setting.

Requirement type: [Fees](#)
Requirement code: [Formal Probation User Fee](#)
Provider: 
Assigned date:  Start date: 
Scheduled end date:  New end date: 
Status:  Status date:
Assessment frequency:  Type:  Amount:

Report Settings:

-- Required settings --

class=equest.app.reports.AutoAssessment

jobQ=batch

-- Optional Report settings --

#report.notify.userID.1=xxxxxx

prompt.parm.1=startDate

prompt.parm.1.type=date

prompt.parm.1.label=Assessment date

prompt.parm.1.required=true

prompt.parm.1.default=-1

stopAfterScheduledEnd=true

Calculate week/month/quarter/year based on start date of requirement

useStartDateForCalculations=false

If useStartDateForCalculations is true, all requirements started on or after this date will assess using start date.

All before, will assess the old way.

useStartDateAsOf=