

State Reporting

For instructions on adding report parameters and fields in Filter Designer, see the [Query Wizard](#) documentation.

To report for state funding, you must create Ad Hoc Data Export reports under Reporting > Ad Hoc Reporting > Data Export. Two reports are available:

State eligibility headcount report

This report tracks the number of students with state eligibility during a reporting period.

In Filter Designer, build a query using fields under: Student or Census/Staff > FRAM > Eligibility.

The screenshot shows the Filter Designer interface for a query named "FRAM State Headcount". The "Short Description" field is empty. The "Long Description" field is also empty. Below these fields is a section titled "Select categories & fields". Under this section, there is a "Filter By" dropdown menu, a "Search" button, and a "Clear" button. The "All Fields" list on the left shows a tree structure with categories: Person, Demographics, Health, Census, Staff, Meetings, FRAM, and Eligibility. The "Eligibility" category is expanded, showing fields: eligibilityID, eligibility, personID, endYear, type, startDate, endDate, applicationID, optOutMedicaid, optOutSCHIP, districtID, eligibilityGUID, freeMilk, notParticipate, and eligType. The "Selected Fields" list on the right contains: individual.lastName, individual.firstName, posElig.personID, posElig.startDate, posElig.endDate, posElig.endYear, posElig.eligibility, and posElig.stateEligible. At the bottom of the interface, there are "Add Function" and "Edit Function" buttons.

Include:

1. individual.lastName
2. individual.firstName
3. posElig.personID
4. posElig.startDate
5. posElig.endDate
6. posElig.endYear
7. posElig.eligibility - This is the student's Federal Eligibility and S = Paid.
8. posElig.stateEligible - 1 = State Eligible is TRUE.

Report results can be filtered by:

- Reporting date range:
 - **Start Date:** Must be on or after the date applications were first accepted (typically **July 1** of the current school year).
 - **End Date:** Must be on or after the first day of the reporting period (for example, **June 1, 2026**, when reporting for June 2026).
- State eligibility = TRUE

Filter the data

ID	*Field	Operator	Value
1	student.lastName		
2	student.firstName		
3	student.personID		
4	posElig.eligibilityID		
5	posElig.eligibility		
6	posElig.personID		
7	posElig.startDate	>=	07/01/2025
8	posElig.endDate	>=	06/01/2026
9	posElig.stateEligible	= TRUE	

Add

Monthly meal count report

This report tracks meals served to state-eligible students. In Filter Designer, build a query using fields under Student or Census/Staff > Point of Sale > State Eligible Transactions.

Ad Hoc Query Wizard - Field Selection

Select fields to use for creating a filter for which logic and output formatting may be applied. Click a field within the All Fields window, or use the Add Function option to sequence the fields in the order selected; however, the sequence can be changed on the Output Formatting screen. At least one field must be selected to continue.

Field Selection > Filter Parameters > Output Formatting > Grouping and Aggregation

*Query Name:

Short Description:

Long Description:

Select categories & fields

Filter By Search Clear

All Fields

- [-] [-] Custom Tab: Technology Assets
 - [-] [-] Point-of-Sale
 - [-] [-] Account Detail
 - [-] [-] POS Identification
 - [-] [-] Transaction Detail
 - [-] [-] State Eligible Transactions
 - personID
 - studentNumber
 - firstName
 - lastName
 - categoryName
 - transactionID
 - txTimeStamp
 - quantity
 - amount
 - description
 - eligibilityCode
 - purchasableID
 - purchasableName
 - stateCode
 - schoolID
 - [-] [-] Legacy Online Payments
 - [-] [-] Online Payments
 - [-] [-] POS Payments

Selected Fields

- posTxSE.personID
- posTxSE.studentNumber
- posTxSE.firstName
- posTxSE.lastName
- posTxSE.categoryName
- posTxSE.transactionID
- posTxSE.txTimeStamp
- posTxSE.quantity
- posTxSE.amount
- posTxSE.description
- posTxSE.eligibilityCode
- posTxSE.purchasableID
- posTxSE.purchasableName
- posTxSE.stateCode
- posTxSE.schoolID

Add Function Edit Function

Include:

- posTxSE.personID
- posTxSE.studentNumber
- posTxSE.firstName (sort priority 3)
- posTxSE.lastName (sort priority 2)
- posTxSE.categoryName (sort priority 1)
- posTxSE.transactionID
- posTxSE.txTimeStamp (limit to reporting period)
- posTxSE.quantity
- posTxSE.amount
- posTxSE.description
- posTxSE.eligibilityCode
- posTxSE.purchasableID
- posTxSE.purchasableName
- posTxSE.stateCode
- posTxSE.schoolID

When filtering the reporting data, select BETWEEN as the Operator for the posTxSE.txTimeStamp field between the first and last day of the reporting period.

Filter the data

ID	*Field	Operator	Value
1	posTxSE.personID		
2	posTxSE.studentNumber		
3	posTxSE.firstName		
4	posTxSE.lastName		
5	posTxSE.categoryName		
6	posTxSE.transactionID		
7	posTxSE.txTimeStamp	BETWEEN	DATE 06/01/2026 THROUGH DATE 06/30/2026
8	posTxSE.quantity		
9	posTxSE.amount		
10	posTxSE.description		
11	posTxSE.eligibilityCode		
12	posTxSE.purchasableID		
13	posTxSE.purchasableName		
14	posTxSE.stateCode		
15	posTxSE.schoolID		

Add