

Introduction

The CCS Fee Estimator can be used to not only estimate fees for a guardian, but to also estimate the potential fee reduction a parent may be entitled to from CCS.

The existing CCS entitlement and bookings for a guardian can be copied into the CCS Fee Estimator or they can be manually entered, or even a combination of both.

The Fee Estimator allows you to do "what-if" calculations, but it is important to note that any changes you make in the Fee Estimator do not affect the guardian's actual bookings or entitlements.

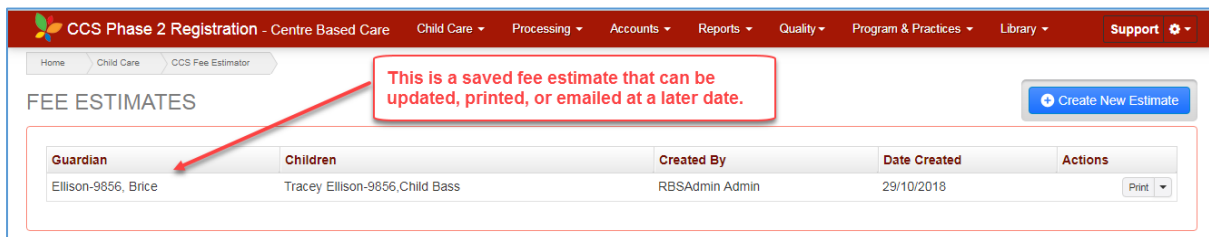
For your convenience, Fee Estimates can be saved and printed or emailed to the guardian. Once a Fee Estimate is saved, you can edit the Fee Estimate and make additional changes and then save the new estimate details.

To access the CCS Fee Estimator

Click "Child Care" (From the Main Menu).

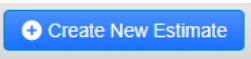
Click "CCS Fee Estimator"

A page similar to the following will be displayed:

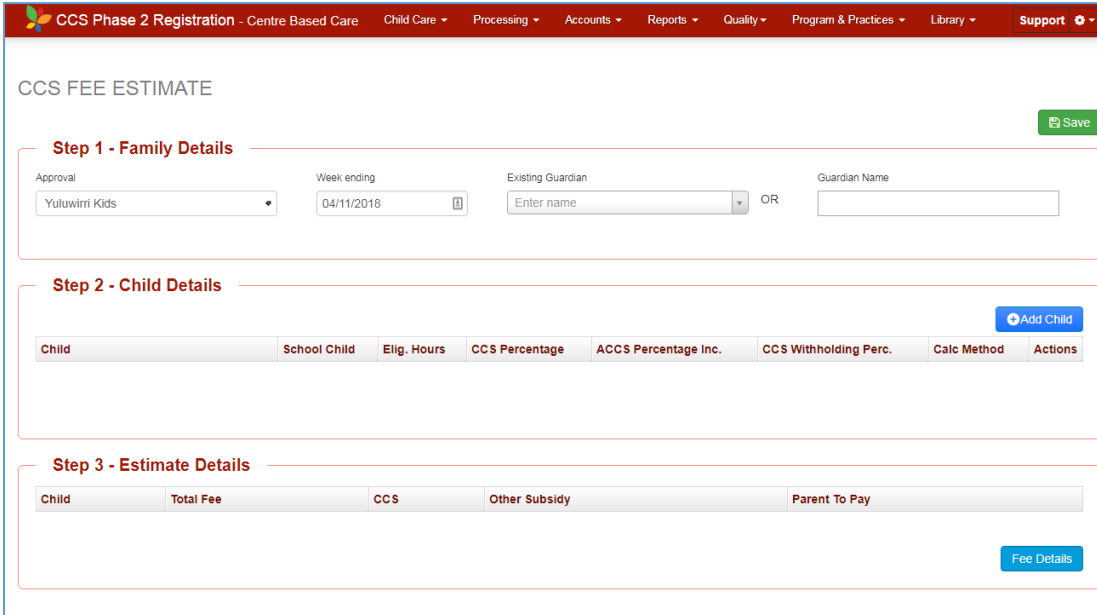


Guardian	Children	Created By	Date Created	Actions
Ellison-9856, Brice	Tracey Ellison-9856, Child Bass	RBSAdmin Admin	29/10/2018	Print

To Create a new estimate

Click  button

A page similar to the following will be displayed:

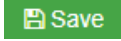


Step 1 - Guardian Details

Before the fees and fee reduction will be estimated, you need to enter the details in **Step 1**:

- Approval
 - If you have multiple approvals, select the required approval.
 - The approval will be used to identify the bookings and entitlements to copy into the fee estimator.
- Week ending date
 - Click on the date to change the date if required.
 - Along with the approval, the week ending date will be used to identify the bookings and entitlements to copy into the fee estimator.
 - The date is also used to identify which CCS Hourly Caps to use in the CCS/ACCS fee reduction estimation.
- Either select an **Existing Guardian** from the dropdown list or enter the **Guardian's name** if the guardian is not registered with your service as yet.

IMPORTANT: If you select an Existing Guardian, any details currently in the Fee Estimator will be cleared and the details for the selected Existing Guardian will be copied into the Fee Estimator.

If you want to keep the existing Fee Estimate, ensure you select the  button before you navigate away from the Fee Estimate page or select a different Existing Guardian.

- When you select an Existing Guardian, the entitlements and children linked with the guardian will be copied into the fee estimator.

Tip: Although the list of existing guardians is displayed in first name order, you can enter part of a surname and only guardians registered with your service that have the entered text in either their first or last name will be displayed.

Step 1 - Family Details

Approval: Yuluwirri Kids | Week ending: 04/11/2018 | Existing Guardian: Enter name (dropdown) | OR | Guardian Name: _____

Step 2 Only guardians that have "ell" in their first or last name are displayed.

Existing Guardian dropdown options: Brice Ellison-9856, Kelly Rodgers-1681, Nellie Collier-7922

If an existing guardian is selected, the details in Step 1 will be similar to the following:

Step 1 - Family Details

Approval: Yuluwirri Kids | Week ending: 04/11/2018 | Existing Guardian: Brice Ellison-9856 | OR | Guardian Name: _____

Discard Changes Apply

Click Apply button to confirm the details in Step 1.

Step 2 - Child Details

If you selected an **Existing Guardian** in Step 1, the children linked to that guardian, along with their bookings and entitlement details, will be copied into the Fee Estimator.

If you typed a **Guardian Name** in Step 1, the list of children in **Step 2** will be empty and you need to add the child entitlement details and their bookings.

Tip: Even if you copied an Existing Guardian, you can still change the details for the children that were copied and also add additional children.

The changes you make in the Fee Estimator only relate to the Fee Estimator and will not affect the details that were copied.

The following child details were copied into the Fee Estimator when an **Existing Guardian** was selected:

Step 2 - Child Details

Allows you to add another child to the fee estimate. Allows you to change the child's booking details for the fee estimate. Allows you to change the child's entitlement details for the fee estimate.

Child	School Child	Elig. Hours	CCS Percentage	ACCS Percentage Inc.	CCS Withholding Perc.	Calc Method	Actions
- Tracey Ellison-9856	Non-School	60	85	0	5	CCB	Edit
No		Subsidy Scheme				Actions	
1		CCB				Edit	


To Add a child's entitlement details

Click + Add Child button to add a new child to the fee estimate

See the "A Child's Entitlement Details" section below for a screen shot and explanation.


To Edit a child's entitlement details


Child	School Child	Elig. Hours	CCS Percentage	ACCS Percentage Inc.	CCS Withholding Perc.	Calc Method	Actions
- Tracey Ellison-9856	Non-School	60	85	0	5	CCB	Edit


Click  button on the child row to change the child's entitlement details.

See the "A Child's Entitlement Details" section below for a screen shot and explanation.

To Delete a child from the fee estimate

Child	School Child	Elig. Hours	CCS Percentage	ACCS Percentage Inc.	CCS Withholding Perc.	Calc Method	Actions	
- Tracey Ellison-9856	Non-School	60	85	0	5	CCB	 Delete Add Timesheet	
		No	Subsidy Scheme					Actions Edit
		1	CCB					

Click  dropdown button on the child row to display a menu.

Click  Delete button

The child and associated bookings will be removed from the Fee Estimator.

Tip: The deletion only relates to the Fee Estimator. If the child's details were copied into the Fee Estimator, they will not be affected by deleting the child from the Fee Estimator.

You are not asked to confirm the deletion because it is only an estimate.

A Child's Entitlement Details

A window similar to the following will be displayed when you Add or Edit a child's entitlement details:

Add/Edit Child

Child Details

Child Name Alice	School Status At School	Default Subsidy CCB
Eligible Hours for this week* 50	Override Child's Eligible Hours <input checked="" type="checkbox"/>	
CCS Percentage 85	Override CCS Percentage <input checked="" type="checkbox"/>	
ACCS Percentage Inc. 0	Override ACCS Percentage Inc. <input checked="" type="checkbox"/>	
CCS Withholding Perc. 5	Override CCS Withholding Perc. <input checked="" type="checkbox"/>	

* CCS eligible hours per fortnight: 0 hrs.
* Week Ending 09/09/2018 is week no. 0 for the purpose of CCS eligible hours per fortnight.

You must enter the following details:

- Child's name.
 - Enter a name that allows you to uniquely identify the child.

- Eligible hours for the Week.
 - You can only change the Eligible hours if the **Override Child's Eligible Hours** checkbox is checked.
 - CCS/ACCS fee reduction will be calculated on these hours.
 - CCS normally advise the guardian of the number of Eligible Hours per fortnight. If you add a child:
 - If the Fee Estimate Week is Week 1 of the CCS Fortnight, you can enter all the hours for the fortnight into the Eligible Hours because the child will have access to all the hours for that week.
 - If the Fee Estimate Week is Week 2 of the CCS Fortnight, you must deduct the number of hours that would normally be used by the child in Week 1 of the CCS Fortnight from the CCS Fortnightly Eligible Hours.
 - For example, if the CCS Fortnightly Hours are 100 per fortnight and the child uses 60 hours per week. For Week 1, you can enter the full 100 hours; however, if you are estimating Week 2 of the CCS Fortnight, enter 40 Eligible Hours (100 hrs for the fortnight less 60 hrs for Week 1, leaves 40 hrs for week 2).
 - If you edit a child that was copied into the Fee Estimator, the fortnightly hours will be obtained from the child's entitlement and the eligible hours will be set based on the Fortnightly Eligible Hours and the CCS Week that applies to the Fee Estimate:
 - For Week 1 of the CCS Fortnight, the Eligible hours for the week will be set to the full fortnightly hours because they will all be available.
 - If the Fee Estimate Week is Week 2 of the CCS Fortnight, the eligible hours will be set to the Fortnightly Hours less the number of hours used in week 1 based on the child's booking.
 - You can change the eligible hours if you want to use a different value.
- CCS Percentage
 - You can only change the CCS Percentage if the **Override CCS Percentage** checkbox is checked.
 - This percentage is used to calculate the CCS fee reduction.
 - When entering the value, enter 76.23% as 76.23 without the %.
- ACCS Percentage
 - You can only change the ACCS Percentage if the **Override ACCS Percentage** checkbox is checked.
 - This value is normally 0, unless the child is receiving Additional Child Care Subsidy.
 - When entering the value, enter 120% as 120.
- CCS Withholding
 - You can only change the CCS Withholding Percentage if the **Override CCS Withholding Percentage** checkbox is checked.
 - If the child is on ACCS, this value is normally 0.
 - If the child is not on ACCS, this value is normally 5%.
 - When entering the value, enter 5% as 5 without the %.
- School Status
 - Either At School or Non-School.
 - This value will affect the CCS Cap that is applied to the fee reduction estimation.
- Default Subsidy
 - CCS/ACCS fee reduction will only be calculated for CCS Subsidy Types.


- No CCS/ACCS fee reduction will be calculated for Non-CCS or Exempt Subsidy Types.
- CCS Fortnightly Hours
 - If there are no existing bookings for the child you are adding, the CCS Fortnightly Eligible Hours cannot be obtained from the Child's entitlement details and will show as 0 hrs. You must enter the correct number of Eligible Hours to apply for the fee estimate week.

* CCS eligible hours per fortnight: 0 hrs.
 * Week Ending 09/09/2018 is week no. 0 for the purpose of CCS eligible hours per fortnight.


- If you edit a child that was copied into the Fee Estimator, the fortnightly hours will be obtained from the child's entitlement record and the eligible hours will be set to the appropriate value based on the child's bookings and the CCS Week that relates to the Fee Estimate.

* CCS eligible hours per fortnight: 100 hrs.
 * Week Ending 09/09/2018 is week no. 2 for the purpose of CCS eligible hours per fortnight.
 * As 40 hrs (of 100 hrs per fortnight) are either used or booked in the first week, the remaining 60 hrs are available for this week.

Tip: The CCS fortnight starts on Monday 02/07/2018 and starts on every second Monday from that date. For example, 02/07/2018 to 15/07/2018, 16/07/2018 to 29/07/2018, 30/07/2018 to 12/08/2018, and so on.

Click  button to save the child's entitlement details.

Click  button to close the window without saving the child entitlement details.

Once you have Saved or Discarded the changes, you will need to click the  button to close the popup window.

A Child's Booking Details


Once a child has been manually added or copied into the Fee Estimator, you can add, change, and delete the bookings that relate to the child.

Step 2 - Child Details

Child	School Child	Elig. Hours	CCS Percentage	ACCS Percentage Inc.	CCS Withholding Perc.	Calc Method	Actions
- Tracey Ellison-9856	Non-School	60	85	0	5	CCB	Edit
		No	Subsidy Scheme		Actions		
		1	CCB		Edit		
		2	NON CCB		Edit		
- Alice	At School	50	85	0	5	CCB	Edit
		No	Subsidy Scheme		Actions		
		1	CCB		Edit		

Child bookings. (points to the booking rows)

The number relates to the Fee Estimate in Step 3. (points to the Elig. Hours column)



In most situations a child will only have one booking (CCS); however, it is possible for a child to have up to 3 separate bookings. One for each Subsidy Type: CCS, Non-CCS, or Exempt.

Tip: When a child is copied into the Fee Estimator, if the child has bookings in multiple rooms for the same approval, the sessions from each room will be copied into the one booking.

To Add a booking

Child	School Child	Elig. Hours	CCS Percentage	ACCS Percentage Inc.	CCS Withholding Perc.	Calc Method	Actions
- Tracey Ellison-9856	Non-School	60	85	0	5	CCB	<div style="border: 1px solid gray; padding: 2px;"> + Add Timesheet - Delete </div>
	No	Subsidy Scheme					Actions
	1	CCB					Edit

Click **+ Add Timesheet** button to add a new booking for the child to the fee estimate

See the "A Child's Booking Details" section below for a screen shot and explanation.

To Change a booking


Child	School Child	Elig. Hours	CCS Percentage	ACCS Percentage Inc.	CCS Withholding Perc.	Calc Method	Actions
- Tracey Ellison-9856	Non-School	60	85	0	5		
	No	Subsidy Scheme					Actions
	1	CCB					Edit
	2	NON CCB					Edit

Click **Edit** button on the booking row for the child to change the child's booking details.

See the "A Child's Booking Details" section below for a screen shot and explanation.

To Delete a booking

Child	School Child	Elig. Hours	CCS Percentage	ACCS Percentage Inc.	CCS Withholding Perc.	Calc Method	Actions
- Tracey Ellison-9856	Non-School	60	85	0	5	CCB	<div style="border: 1px solid gray; padding: 2px;"> - Delete + Add Timesheet </div>
	No	Subsidy Scheme					Actions
	1	CCB					Edit

Click  dropdown button on the child's booking row to display a menu.

Click **- Delete** button

The child's booking will be removed from the Fee Estimator.

Tip: The deletion only relates to the Fee Estimator. If the child's booking details were copied into the Fee Estimator, they will not be affected by deleting the child's booking from the Fee Estimator.

A Child's Booking Details

A window similar to the following will be displayed when you Add or Edit a child's booking details:

Add/Edit Timesheet for Tracey Ellison-9856

Timesheet Details

Subsidy
CCB

Default Program
LDC - Koalas

TimeSheet

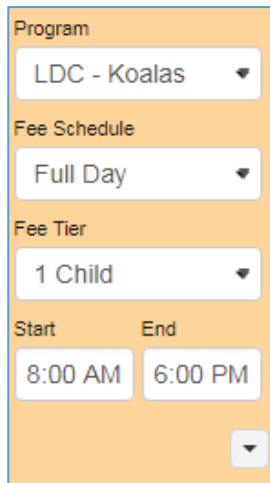
+ Session + Copy Day

Monday 3rd Sep 18	Tuesday 4th Sep 18	Wednesday 5th Sep 18	Thursday 6th Sep 18	Friday 7th Sep 18	Saturday 8th Sep 18	Sunday 9th Sep 18
Program LDC - Koalas Fee Schedule Full Day Fee Tier 1 Child Start End 8:00 AM 6:00 PM	Program LDC - Koalas Fee Schedule Full Day Fee Tier 1 Child Start End 8:00 AM 6:00 PM	Program LDC - Koalas Fee Schedule Full Day Fee Tier 1 Child Start End 8:00 AM 6:00 PM	Program LDC - Koalas Fee Schedule Full Day Fee Tier 1 Child Start End 8:00 AM 6:00 PM			

Close

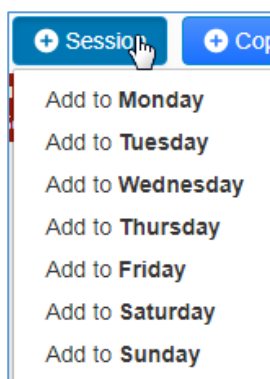
You must enter the following details:

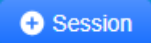
- Subsidy.
 - If you are adding a new booking, you must select a Subsidy Scheme from the dropdown list.
 - If you are changing a booking, you cannot change the Subsidy Scheme; however, if you need to change the Subsidy Scheme, but you can delete the booking and create a new booking.
 - The selected subsidy scheme will determine if CCS/ACCS fee reduction is estimated using the booking.
 - CCS/ACCS will only be estimated for bookings with CCS subsidy schemes.
 - No CCS/ACCS will be estimated for bookings with Non-CCS or Exempt subsidy schemes.
- Default Program
 - A default program must be selected from the dropdown list and can be changed when you add or change a booking.
 - The default program is allocated to any new sessions that you create.
- Timesheet
 - A timesheet (booking) is comprised of one or more sessions.
- Sessions



- If required, you can have multiple sessions on the same day. For example, before school and a separate after school session.
- Each session must be allocated a Program, which determines the default session start and end times.
 - The Start and End Times for a session can be overridden.
- Each session must be allocated a Fee Schedule, which determines the calculation type "Sessional Fixed Fee" or an "Hourly Fee" and the rate.
- If the Fee Schedule is a Sessional Fixed Fee, you must select a Fee Tier for the Fee Schedule, which determines the cost for the session.
- The Start and End times for a session:
 - Must be entered.
 - The Start Time must be less than the End Time.
 - The times cannot overlap another session on the same day.

To Add a Session




Click  button to display a dropdown list of days.

Click the required day of the week.

See above for details on editing a session.

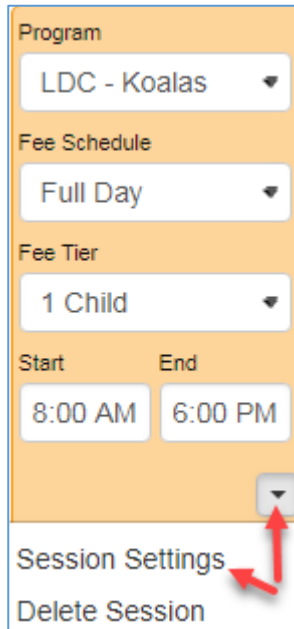
To Edit a Session

Click the  dropdown button for the Program, Fee Schedule, Tier, and enter the session times.

See above for details on editing a session.

To Edit the Session Settings

Tip: You would only need to edit a session's settings if you need to override the Fee for the session or exclude the session from CCS reduction estimates.




Program
LDC - Koalas

Fee Schedule
Full Day

Fee Tier
1 Child

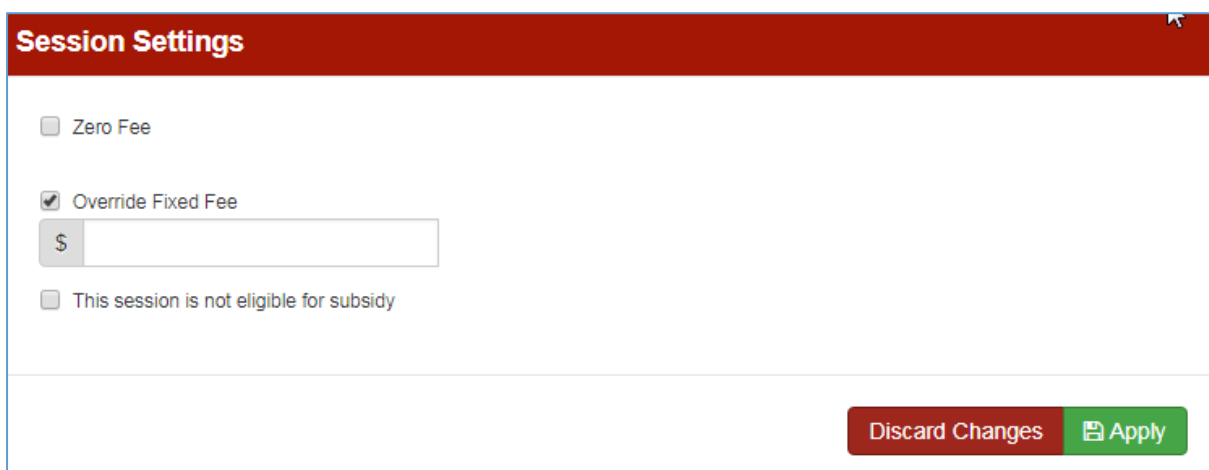
Start 8:00 AM End 6:00 PM

Session Settings
Delete Session

Click  dropdown button at the bottom of the session to display a menu.

Click the Session Settings button.

A window similar to the following will be displayed:



Session Settings

Zero Fee

Override Fixed Fee

\$

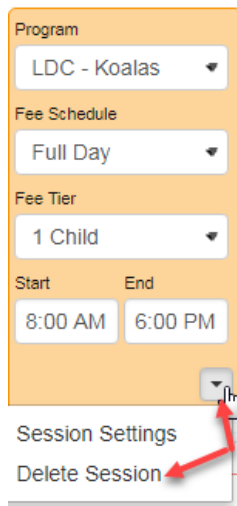
This session is not eligible for subsidy

Discard Changes Apply

- Zero Fee
 - Only check this checkbox if you do not want to charge a fee for the session.
- Override Fixed Fee
 - Only check this checkbox if you want to charge a specific fee for the session and ignore the fee schedule fee.
- This session is not eligible for subsidy

- Only check this checkbox if you want to exclude this session from CCS fee reduction estimates.
- Click the **Save** button to save the session settings or click the **Discard Changes** button to throw away the changes you just made.
- Once you have Saved or Discarded the changes, you will need to click the **Close** button to close the popup window.

To Delete a Session



Program
LDC - Koalas

Fee Schedule
Full Day

Fee Tier
1 Child

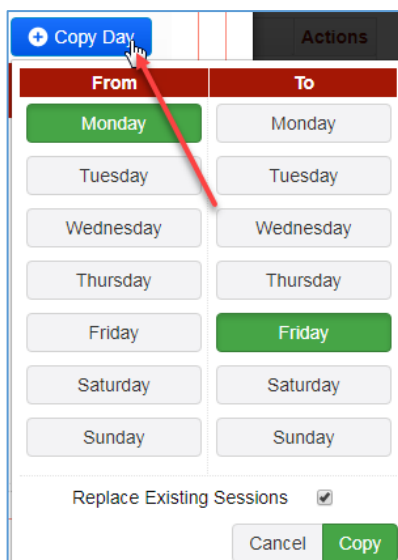
Start 8:00 AM End 6:00 PM

Session Settings
Delete Session

Click  dropdown button at the bottom of the session to display a menu.

Click the Delete Session button.

To Copy Sessions from one day to one or more other days



+ Copy Day Actions

From	To
Monday	Monday
Tuesday	Tuesday
Wednesday	Wednesday
Thursday	Thursday
Friday	Friday
Saturday	Saturday
Sunday	Sunday

Replace Existing Sessions

Cancel Copy

Click **+ Copy Day** button to display a dropdown list of days to copy from and copy to":

- From
 - Click the required day of the week to copy from.

- To
 - Click one or more days to copy to.
- Replace Existing Sessions
 - Check this checkbox if you want to replace any existing sessions in the copy To Days with the session from the copy From Day.
 - Uncheck this checkbox if you want to add the copy From Day session(s) to the sessions already in the copy To Days.
- Click the **Copy** button to copy the sessions.
- Click the **Cancel** button to cancel the copy.

To save a booking

Once you have completed making changes to your booking:

Click **Apply** button to save the child's booking details.

Click **Discard Changes** button to close the window without saving the child booking details.

Once you have Saved or Discarded the changes, you will need to click the **Close** button to close the popup window.

Step 3 - Estimate Details

As you make changes to the child booking and entitlement details, the fees and ACCS/CCS fee reduction values are estimated for each child.

IMPORTANT: The fee and fee reduction estimate are based on the details that are currently entered in the Fee Estimator.

Why is the estimate for a child highlighted in red?

Step 3 - Estimate Details				
Child	Total Fee	CCS	Other Subsidy	Parent To Pay
- Tracey Ellison-9856	\$300.00	\$242.25	\$0.00	\$57.75
1	\$300.00	\$242.25	\$0.00	\$57.75
- Sally	\$0.00	\$0.00	\$0.00	\$0.00
1	\$0.00	\$0.00	\$0.00	\$0.00

If an error has occurred in the estimation, such as no session details have been entered in the booking for a child, the total row for the child in the Estimate Details will be highlighted in red.

If you edit the booking for the child, the error message will be displayed at the bottom of the Add/Edit Booking window.

For example,

Add/Edit Timesheet for Sally

Timesheet Details

Subsidy
CCB

Default Program
LDC - Koalas

TimeSheet

+ Session
+ Copy Day

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
3rd Sep 18	4th Sep 18	5th Sep 18	6th Sep 18	7th Sep 18	8th Sep 18	9th Sep 18

Please fix the following errors:

- There must be sessions

Discard Changes
Apply


In this case, there are no sessions in the booking.
Either add the sessions or delete the child/booking from the estimate.

Saving an estimate

Once you have entered your estimate details, you can save the estimate to allow you to:


- Print the estimate.
- Email the estimate to a recipient
- Keep the estimate for future reference
- Edit the estimate at a later date once you have more information.





To save an estimate

CCS FEE ESTIMATE 

Step 1 - Family Details


Approval: Yuluwirri Kids | Week ending: 09/09/2018 | Existing Guardian: Brice Ellison-9856 | Guardian Name:


Step 2 - Child Details 

Child	School Child	Elig. Hours	CCS Percentage	ACCS Percentage Inc.	CCS Withholding Perc.	Care Method	Actions
- Tracey Ellison-9856	Non-School	60	85	0	5	CCB	
		No Subsidy Scheme				Actions	
		1	CCB				
- Sally	At School	50	85	0	5	CCB	
		No Subsidy Scheme				Actions	
		1	CCB				

Step 3 - Estimate Details



Child	Total Fee	CCS	Other Subsidy	Parent To Pay
- Tracey Ellison-9856	\$300.00	\$242.25	\$0.00	\$57.75
	1 \$300.00	\$242.25	\$0.00	\$57.75
- Sally	\$100.00	\$80.75	\$0.00	\$19.25
	1 \$100.00	\$80.75	\$0.00	\$19.25



Click  button to save the estimate.

CCS FEE ESTIMATE

Once you Save the estimate, the Save button is replaced with the Print and Email buttons.

Step 1 - Family Details

Approval: Yuluwirri Kids | Week ending: 09/09/2018 | Existing Guardian: Brice Ellison-9856 | Guardian Name:

Step 2 - Child Details

Once you click the Save button, the Save button is replaced with the Print and Email buttons that allow you to print and/or email the estimate.

Tip: If you continue to work on the estimate after saving, the Print and Email buttons will be replaced with the Save button to allow you to save your new changes.

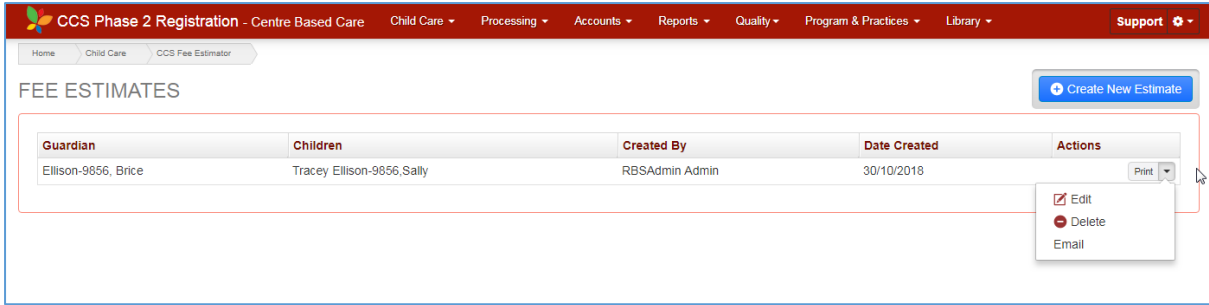
Saved Fee Estimates

If you navigate away from the Fee Estimator page, you can access your saved estimate:

Click "Child Care" (From the Main Menu).

Click "CCS Fee Estimator"

A page similar to the following will be displayed:




Guardian	Children	Created By	Date Created	Actions
Ellison-9856, Brice	Tracey Ellison-9856, Sally	RBSAdmin Admin	30/10/2018	<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete <input type="checkbox"/> Email

Each saved estimate appears on a separate row with the Guardian name, child names, user who created the estimate, and the date the estimate was created.

For each saved estimate you can:

- Edit the estimate
- Print the estimate
- Email the estimate
- Delete the estimate

To edit a saved estimate


Click the  dropdown button for the required estimate to display the menu.

Click  **Edit** button from the dropdown menu.

The saved estimate will be opened in the Fee Estimator allowing you to make changes.


See the section above for details on changing a fee estimate.

To print a saved estimate

Click  **Print** button for the required estimate.

See the "Print Estimate" section below for details on printing a fee estimate.


To email a saved estimate

Click the  dropdown button for the required estimate to display the menu.

Click  **Email** button from the dropdown menu

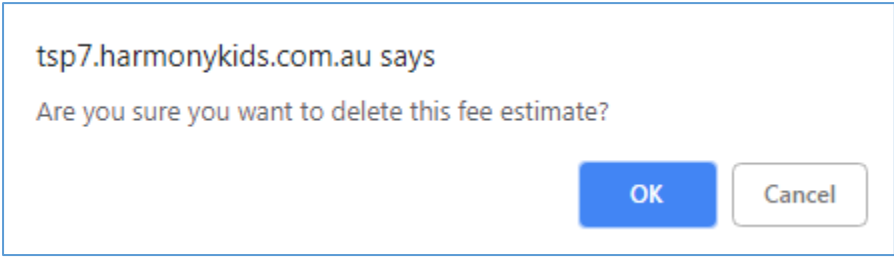
See the "Email Estimate" section below for details on emailing a fee estimate.

To delete a saved estimate

Click the  dropdown button for the required estimate to display the menu.

Click  **Delete** button from the dropdown menu.

A confirmation message will be displayed.




Click the **OK** to confirm the deletion or click the **Cancel** button to cancel the deletion.

Printing a Fee Estimate

You can print a saved estimate from the list of estimates or print an estimate you are currently working on provided you have saved the estimate and the Print button is displayed.

See the options above for the location of the Print buttons in either case.

The following is a sample fee estimate report:

Centre Based Care Yuluwirri Kids Fee Estimator Report										
							Week: 03/09/2018 to 09/09/2018 CCS Week No.: 2			
Family : Brice Ellison-9856										
Child	Tot Hours	Tot Fee	Eligible Hours		CCS %	ACCS %	Withholding %	CCS	Other Subsidy	Parent to Pay
			Fortnight	Week						
Tracey Ellison-9856	40.00	\$300.00	100.00	60.00	85.00%	0.00%	5.00%	\$242.25	\$0.00	\$57.75
Sally	10.00	\$100.00	0.00	50.00	85.00%	0.00%	5.00%	\$80.75	\$0.00	\$19.25
Family Total:	50.00	\$400.00						\$323.00	\$0.00	\$77.00
Note: 1. This is a fee estimate only and may not exactly match the CCS calculations 2. Parent to Pay = (Tot Fee - CCS - Other Subsidy Amount)										

Emailing a Fee Estimate

You can email a saved estimate from the list of estimates or an estimate you are currently working on provided you have saved the estimate and the Email button is displayed.

See the options above for the location of the Email buttons in either case.

When you select the email button, a window similar to the following is displayed:

Email Estimate

Email Fee Estimate Report

Recipient Name: Parent/Guardian:

Recipient Email Address:

Email Template:

Subject:

Message:

B I U **H. H.** **x₂ x²** **Normal** **Normal** **Sans Serif**

Dear Brice Ellison-9856,

Please find attached your fee estimate.

This is an estimate only. Once your attendance record has been processed by Centrelink, the amount may be adjusted.

If you have any further queries, please contact us.

Regards,

Centre Based Care

From Name:

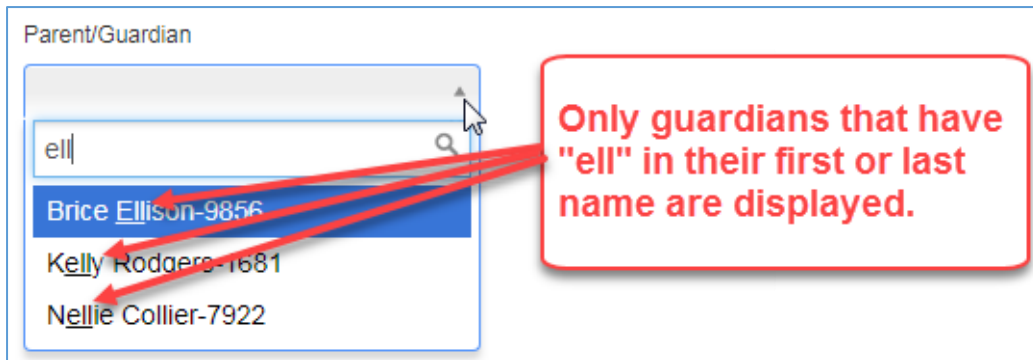
From Email Address:


Tip: The Fee Estimate Report is attached to the email that you send to the recipient.

See the section above for details on changing a fee estimate.

- Recipient Name
 - If you copied the Guardian details to create the estimate, the guardian name will automatically appear.
 - If you created the estimate without selecting an Existing Guardian, you will need to enter the recipient's name.
- Parent/Guardian
 - You can select a guardian from the dropdown list of guardians.
 - Once you select the guardian, the guardian's details will be copied into the **Recipient Name** and **Recipient Email Address** fields replacing any values that are already in those fields.

Tip: Although the list of existing guardians is displayed in first name order, you can enter part of a surname and only guardians registered with your service that have the entered text in either their first or last name will be displayed.



- Email Template
 - Select a template from the list provided.
 - The template contains the email **Subject** and **Message** that has been previously been created.
 - Templates are useful because they allow you to enter a **Subject** and a **Message** that can be used over and over again when you email an estimate to a recipient.
 - If an email template has not been set up, you will need to manually enter the details in the **Subject** and **Message** fields.
 - Email templates can be created by clicking the  Settings Cog button located at the top right of the system window, selecting the Setup menu option, and selecting the Email Templates tab.
 - See the separate "**Email Template Details**" tip sheet for details on how to setup an email template.
- Subject
 - An email subject must be entered.
 - The Subject should be entered when you select an Email Template.
 - You can change the subject that was copied in by selecting an Email Template, but this will not update the template.
- Message
 - An email message must be entered.
 - The Message should be entered when you select an Email Template.
 - You can change the Message that was copied in by selecting an Email Template, but this will not update the template.
 - The message allows you to format the text and paragraphs.
- From Name
 - Enter the name of the organisation or person sending the email.
 - This defaults to the Site name.
- From Email Address
 - Enter the email address of the organisation or person sending the email.
 - This defaults to the Site email address.

Once you have completed making the changes to the email settings:

Click [Email Report](#) button to send the email with the Fee Estimate Report as an attachment.

Click [Close](#) button to close the window without sending the email.