

Using fee and payment reports

MR&C USER GUIDE FOR COUNTY VITAL RECORDS STAFF

This guide provides information on using the following reports:

[Daily fee transaction report](#)

[Free transaction report](#)

[Outstanding invoice report](#)

Access to reports depends on your assigned security roles.

Daily fee transaction report

Purpose

The daily fee transaction report shows details of each customer service request item type entered for a given date or date range. The report includes the quantity of each request item type and subtotals for the base fees and surcharges related to each item.

The end of the report provides a breakdown of the total monies collected by cash, check, and credit card. Use the report to reconcile daily receipts for customer service requests.

Generate

After logging in to MR&C:

1. Select the **Customer Service** tab.
2. Select *Reports* from the **Tasks** menu.
3. Select *Daily Fee Transaction Report*.
4. Enter a date or date range.
5. Select your issuance office.
6. Click **Generate**.
7. Follow the screen prompts to open and print the pdf.

Free transaction report

Purpose

This report provides information on waived fees. Requests appear on the report when a user checks the *No charge* box for a request item. It includes request number, request item type, the user who waived the fee, and the amount waived.

Generate

After logging in to MR&C:

1. Select the **Customer Service** tab.
2. Select *Reports* from the **Tasks** menu.
3. Select *Free Transaction Report*.
4. Enter a date or date range.
5. Select your issuance office.
6. Click **Generate**.
7. Follow the screen prompts to open and print the pdf.

Outstanding invoice report

Purpose

This report shows all unpaid invoices for your issuing location(s). It includes invoices for both customer service and electronic funeral home requests.

Note: Manually setting an invoice to *Closed* status does not remove it from this report.

Generate

After logging in to MR&C:

1. Select the **Customer Service** tab.
2. Select *Reports* from the **Tasks** menu.
3. Select *Outstanding Invoice Report*.
4. Click **Generate**.
5. Follow the screen prompts to open and print the pdf.

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