

# Exempt or Unexempt Fee Assignments (Fees Wizard)

Last Modified on 10/22/2022 9:48 am CDT

[Important Information about Exempting Fee Assignments | Exempt/Unexempt Fee Assignments Editor | Using the Exempt/Unexempt Fees Mode](#)

This information applies when the **Exempt/Unexempt Fee Assignments** option is selected in the first step of the Fees Wizard.

**Classic View:** [Fees > Wizards > Fee Wizard](#)

**Search Term:** [Fee Wizard](#)

The Exempt/Unexempt Fee Assignments mode eliminates the student's need to pay the fee assignment. Unexempting indicates the student must make the fee payment. Only fee assignments marked [May be Exempted](#) are listed in the fee selection.

Exempted/Unexempted fees are visible on the student's [Fees](#) tab. A Fees Wizard log entry is also created and visible from the first page of the [Fees Wizard](#).

**Fees Wizard** ☆
Fees > Wizards > Fees Wizard

**Fee Wizard**

The Fee Wizard was designed to manage Fee Assignments en masse. Select a mode to get started.

**Select Wizard Mode**

Create Fee Assignments  
 **Exempt/Unexempt Fee Assignments**  
 Adjust Fee Assignments  
 Void Fee Assignments  
 Mark Fee Assignments Uncollectible

**Fees Wizard**
Fees > Wizards > Fees Wizard

**Fee Wizard**

This wizard will Exempt or Unexempt Fee Assignments. Only Fee Assignments marked "may be Exempted" will be displayed in the list of Fees for selection. Fee Payments made against Fee Assignments that have been exempted will be Voided and returned to the student as a Surplus.

You must select how you want to handle situation where the payment is a credit card payment or online payment. If you chose to Continue processing, these payments will be added to the persons surplus and hence can no longer be refundable in the Payments Reporter. If you chose to Stop processing, you will be given a list of the Fees found that have such payments and allow you to use the Payments Reporter to void these payments. After they are refunded you can use the Fees Wizard to exempt the fees.

**Exempt/Unexempt Fees**

Exempt  Unexempt

\*Date

How do you want to handle processing if exempting the assignment requires the voiding of a credit card or online payment?

Stop processing and produce an error (allowing you to refund the payment in Payments Reporter)  
 Continue processing and void the payment (which will make it nonrefundable in Payments Reporter)

**Select Carter Middle Fees**

10th Grade PSAT Prep \$50.00  
 Annual Registration \$5.00  
 Art \$10.00  
 Book \$0.00\*  
 Carter Field Trip \$15.00  
 Chemistry Lab \$5.00  
 Chromebook Misc Repair \$0.00\*

CTRL-click and SHIFT-click for multiple

Created From  To

**Select Calendars**

10-11 3 Structure CMS  
 11-12 Carter Middle  
 12-13 3 Structure - Carter Mid  
 13-14 3 Structure - Carter Mid  
 14-15 Carter Middle  
 19-20 Carter Middle  
 20-21 Carter Middle  
 21-22 Carter Middle  
 22-23 Carter Middle

**Select Students**

Grade  Ad Hoc Filter

All Students  
 06  
 07  
 08

*Exempt/Unexempt Wizard*

## Important Information about Exempting Fee Assignments

The following logic applies to exempting fee assignments.

- A fee assignment that has no child transactions will be exempted and the balance due is set

to \$0.

- A fee assignment that has fee payments will be exempted and payments will be voided. The amount paid will be considered a surplus. The balance due is set to \$0.
- A fee assignment that has adjustments will be exempted and the adjustments will be voided. The balance due is set to \$0.
- A fee assignment with voids will be exempted and the voids will be ignored. The balance due is set to \$0.

## Exempt/Unexempt Fee Assignments Editor

The following options are available when using the Exempt/Unexempt Fee Assignments mode.

Field	Description
<b>Exempt/Unexempt Option</b>	<p>Selection determines the action to apply to the selected fees.</p> <ul style="list-style-type: none"> <li>• Exempt - the selected fees will be marked as exempt on the student's Fees tab.</li> <li>• Unexempt - the selected fees will have the exemption removed on the student's Fees tab.</li> </ul>
<b>Date</b>	<p>Entered date is used in the Fee Audit report and indicates when the fee was made exempt or not exempt. This is a required field. Dates can be entered in <i>mmdyy</i> format or use the calendar icon to select a date.</p>
<b>How do you want to handle processing if exempting the assignment requires the voiding of a credit card or online payment?</b>	<ul style="list-style-type: none"> <li>• <b>Stop processing and produce an error (allowing you to refund the payment in Payments Reporter):</b> If a credit card or online payment was made on the fee assignment, marking this option produces an error message similar to the one below. The Fees Wizard will NOT void the payment and it must be refunded in the Payments Reporter tool for each person listed in the error message. <div data-bbox="525 1509 1362 1693" data-label="Code-Block" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <pre>Form Validation Error You must use the Payments Reporter tool to void all online payments associated with these fees before voiding the assignment: Youngmark, Britani:Carter Field Trip - Bendix, Darren:Carter Field Trip - Dohl, Lewis:Carter Field Trip - Hilliges, Paolo:Carter Field Trip - Lain, Isabelle:Carter Field Trip -  District: MN - MN (MN) appServer b3710398-CMB001 Date: Jul 31, 2022 10:13:54 AM Error Token: 1862480249 This error was caused by invalid input. Please hit 'Back' and correct the mistake. If this is not the case, please report this error to Campus Support. Describe the steps necessary to reproduce the error.</pre> </div> </li> <li>• <b>Continue processing and void the payment (which will make it nonrefundable in Payments Reporter):</b> If a credit card or online payment was made on the fee assignment, marking this option allows the Fees Wizard to void the payment. The payment amount is deposited into the surplus, and the payment can <b>NOT</b> be refunded in Payments Reporter.</li> </ul>

Field	Description
<b>Select Fees</b>	List of fees that can be marked as exempt or unexempt. Only fees currently marked as <a href="#">May be Exempted</a> on the <a href="#">Fees</a> editor appear in the list for selection.
<b>Created From/To Date Range</b>	Entered dates are used to only mark those fees that were created (assigned to the student) during that date range as exempt or not exempt. Dates are entered manually or you may use the calendar icon to select a date. The From Date must be same as or before the To Date; the To Date must be the same as or after the From Date. For example, a From Date of 03/05/2013 requires the To Date to either be 03/05/2013 or after 03/05/2013.
<b>Select Calendars</b>	Students who have active enrollments in the selected calendars AND have the selected fee assigned to them will have fees exempted or unexempted. The Year and School selected in the Campus toolbar will automatically be selected. If a school is not selected in the Campus toolbar, all calendars for all years appear in the calendar list.
<b>Select Students</b>	Students can be selected by a Grade Level or an Ad hoc Filter. If a school is selected in the Campus toolbar, only those grade levels in the selected school are available for selection. When an ad hoc filter is selected, only those students included in the filter will have fees exempted or unexempted.

## Using the Exempt/Unexempt Fees Mode

The following procedures walk the user through the exempting or unexempting fee assignments.

### Mode Selection

1. Select the **Exempt/Unexempt Fee Assignment Mode** from the main Fees Wizard page.
2. Click the **Next** button. The **Exempt/Unexempt** editor displays.

### Exempt Fees

1. Select the **Exempt** radio button to make fee assignments exempt.
2. Enter a **Date** for when the fee became exempt.
3. Determine how to handle credit card or online payments by selecting the radio button for the option **Stop processing and produce an error** or **Continue processing and void the payment**.
4. If the fees should be marked as unexempt, continue to the [Unexempt Fees](#) section.
5. Select the **Fees** to mark as exempt.
6. Enter a **Created From** date and a **Created To** date.

7. Select the **Calendar**.
8. Select the **Students** either by **Grade Level** or an **Ad hoc Filter**.

## Unexempt Fees

1. Select the **Unexempt** radio button to make fee assignments exempt.
2. Enter a **Date** for when the fee became unexempt.
3. Select the **Fees** to mark as exempt.
4. Enter a **Created From** date and a **Created To** date.
5. Select the **Calendar**.
6. Select the **Students** either by **Grade Level** or an **Ad hoc Filter**.

## Preview Exempt/Unexempt Fees

1. Click the **Preview** button. A Fee Wizard Report displays in a new browser window, listing the students who will have the selected fees exempted or unexempted.

**TIP:** If you are running the Fees Wizard with the **Stop processing and produce an error (allowing you to refund the payment in Payments Reporter)** option, you may want to print this report and use it when making refunds in Payments Reporter.

2. Return to the **Fees Wizard** window to assign the fees.

Fees will not be exempted until the **Run Wizard** button is selected.

21-22 Carter Middle		Fee Wizard Report		
3455 Middle School Road, Metro City MN 55555 Generated on 07/29/2022 01:35:48 PM Page 1				
21-22 Carter Middle				
Student	Person ID	Name	Assignment ID	Exempt
Abraham, Charla	942	Carter Field Trip	28272	Exempt
Hohl, Kaori	17569	Carter Field Trip	28271	Exempt
Marcker, Ultan	22919	Carter Field Trip	28273	Exempt

Preview Exempt Fee Assignments

<b>21-22 Carter Middle</b> <small>3455 Middle School Road, Metro City MN 55555 Generated on 07/29/2022 01:40:07 PM Page 1</small>	<b>Fee Wizard Report</b>
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21-22 Carter Middle

Student	Person ID	Name	Assignment ID	Exempt
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Hohl, Kaori	17569	Carter Field Trip	28271	Unexempt
Marcker, Ultan	22919	Carter Field Trip	28273	Unexempt

*Preview Unexempt Fee Assignments*

## Run Wizard

Click the **Run Wizard** button to mark the selected fees as exempt or unexempt. A **Fees Wizard Report** displays in a new browser window listing the students whose fees were exempted or unexempted.

This is the only indication a user receives that fees were exempted.

<b>21-22 Carter Middle</b> <small>3455 Middle School Road, Metro City MN 55555 Generated on 07/29/2022 01:35:48 PM Page 1</small>	<b>Fee Wizard Report</b>
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*Exempt Fee Assignment Run Wizard Report*

<p><b>21-22</b>  <b>Carter Middle</b>          3455 Middle School Road, Metro City MN 55555          Generated on 07/29/2022 01:40:07 PM Page 1</p>		<p><b>Fee Wizard Report</b></p>		
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Unexempt Fee Assignment Run Wizard Report

**Previous Version**

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