

Exempt or Unexempt Fee Assignments (Fees Wizard) [.2124 - .2227]

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You are viewing a previous version of this article. See [Exempt or Unexempt Fee Assignments \(Fees Wizard\)](#) for the most current information.

[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.

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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](#).

If a fee was paid using an online payment, the fee assignment can **NOT** be made made exempt. If needed, use the [Payments Reporter](#) to refund the payment.

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 Uncollected

Fee Wizard Logs

Fee Wizard

This wizard will Exempt or Unexempt Fee Assignments. Only Fee Assignments displayed in the list of Fees for selection. Fee Payments made against Fee Assignments Voided and returned to the student as a Surplus.

Exempt/Unexempt Fees

Exempt Unexempt

*Date

Select High School Fees

- Course fee \$10.00
- Athletic Equipment \$250.00*
- Athletic/Sports Fees \$210.00*
- Candy \$200.00*
- Cap & Gown \$25.00*
- Fines \$100.00*
- Fundraiser Cards \$50.00*
- Happenings Book \$30.00*

CTRL-click and SHIFT-click for multiple

Created From To

Select Calendars

- 050 (CHS) 05-06
- 050 (CHS) 06-07
- 050 (CHS) 07-08
- 050 (CHS) 08-09
- 050 (CHS) 09-10
- 050 (CHS) 10-11
- 050 (CHS) 11-12

Select Students

Grade

- 09
- 10
- 11
- 12

Ad Hoc Filter

Exempt/Unexempt Wizard

Important Information about Exempting Fee Assignments

If a fee was paid using an online payment, the fee assignment should **NOT** be made made exempt. If needed, use the [Payments Reporter](#) to refund the payment.

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
Exempt/Unexempt Option	<p>Selection determines the action to apply to the selected fees.</p> <ul style="list-style-type: none"> • Exempt - the selected fees will be marked as exempt on the student's Fees tab. • Unexempt - the selected fees will have the exemption removed on the student's Fees tab.
Date	<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>
Select Fees	<p>List of fees that can be marked as exempt or unexempt. Only fees currently marked as May be Exempted on the Fees editor appear in the list for selection.</p>
Created From/To Date Range	<p>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.</p> <p>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.</p>

Field	Description
Select Calendars	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.
Select Students	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. If the fees should be marked as unexempt, continue to the [Unexempt Fees](#) section.
4. Select the **Fees** to mark as exempt.
5. Enter a **Created From** date and a **Created To** date.
6. Select the **Calendar**.
7. 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.
2. Return to the **Fees Wizard** window to assign the fees.

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

2011-12 Elementary		Fee Wizard Report		
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2011-12 Elementary				
Student	Person ID	Name	Fee ID	Amount
Student, Morgan	123456	Testing Fee	189	120.00
Student, Dylan	234567	Testing Fee	189	120.00
Student, Alan	345678	Testing Fee	189	120.00
Student, Hannah	456789	Testing Fee	189	120.00
Student, Jabar	567890	Testing Fee	189	120.00
Student, Caleb	678901	Testing Fee	189	120.00
Student, Heather	789012	Testing Fee	189	120.00
Student, Karissa	890123	Testing Fee	189	120.00
Student, Zachary	901234	Testing Fee	189	120.00
Student, Gabriel	012345	Testing Fee	189	120.00
Student, Nicholas	098765	Testing Fee	189	120.00
Student, Angela	987654	Testing Fee	189	120.00
Student, Colin	876543	Testing Fee	189	120.00
Student, Jada	765432	Testing Fee	189	120.00

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.

**2011-12
Elementary**

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Fee Wizard Report

2011-12 Elementary

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Student, Jada	765432	Testing Fee	189	120.00

Exempt/Unexempt Fee Assignment Run Wizard Report