Automatically Omit a Family Tuition or ePay

Do you have families with special tuition or ePayment arrangements that you don't want to post tuition to or collect ePayments from?

On the *Billing Info* tab of the *Family* record, you can use the **Omit Family** settings to choose whether to automatically exclude the family from tuition fees posted using **Post Tuition Fees** (*Transactions* menu) or from ePayments collected using **Process ePayments** (*Transactions* menu).

⭐ The Omit Family setting allows you to utilize automation and schedule tasks **Post Later**/**Process Later**) because the family is automatically excluded; there is no need to select the checkbox manually, which can't be done with scheduled tasks.

⭐ When opting to Post Now/Process Now, the Omit Family setting reduces errors by eliminating the need to remember which families should be excluded and manually selecting a checkbox to omit them.

Permissions control the ability of your Users to see certain data and take specific actions. Before moving forward review **User Permissions for the Omit Family Setting**

When the setting checkboxes are selected, the family will display (sorted to the top) in Post Tuition Fees and Process ePayments but will be unchecked and highlighted in teal indicating they were omitted. The checkbox is inactive and cannot be selected to include the family. To include them, you must clear the Omit Family settings checkbox in their Family record.

Preview Tuition Fees

← RETURN **POST NOW**

TRANSACTIONS	TOTAL AMOUNT	FAMILIES	STUDENTS	CLASSES
8	**630.00**	**4**	**5**	**3**
Total Fees	Currency	Total Families	Total Students	Total Classes

8 Selected CLEAR SELECTIONS

The checkbox is deactivated and cannot be selected to include the family. To have them included, the Omit Family setting checkbox in their Family record must be cleared.

Legend:

☐ Duplicate Tuition Fee   ☐ Omitted

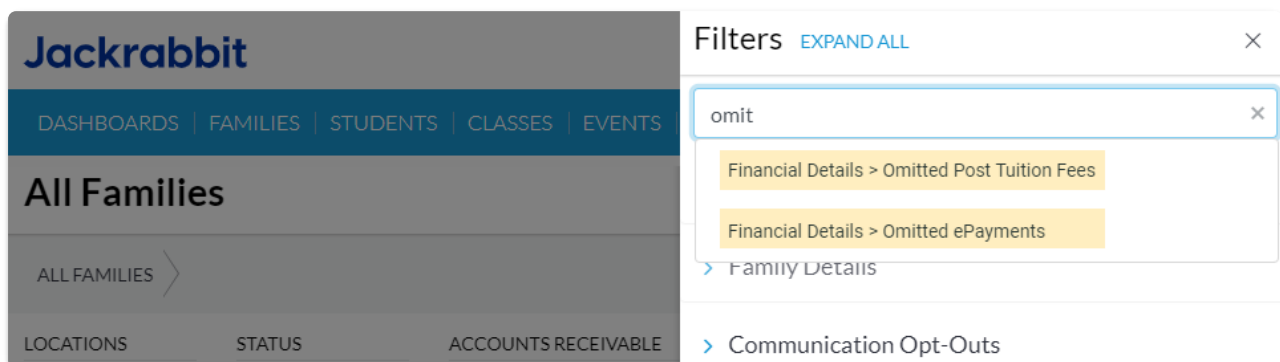|	TRANSACTION DATE	FEE	TITLE	CATEGORY 1	SESSION	FAMILY	CLASS	STUDENT	DUP REASON	DETAILS	DISCOUNT RULE
☐	Nov 1, 2022	100.00	November, Base Fee=80.00	Jazz	2022 Fall	Newfield	Jazz - Tues 7pm	Nicole Newfield	Student	Details	No Discounts
☐	Nov 1, 2022	80.00	November	Ballet	2022 Fall	Devon	Ballet - Mon 6pm	Nadine Devon		Details	No Discounts
☐	Nov 1, 2022	75.00	November	Other Fees	2022 Fall	Devon	Acro - Mon 7pm	Nadine Devon		Details	No Discounts
☑	Nov 1, 2022	80.00	November	Hip Hop	2022 Fall	Aames	Hip Hop/Funk - Wed 7pm	Alistair Aames		Details	No Discounts
☑	Nov 1, 2022	75.00	November	Other Fees	2022 Fall	Ager	Acro - Mon 7pm	Danielle Ager		Details	No Discounts
☑	Nov 1, 2022	80.00	November	Ballet	2022 Fall	Ager	Ballet - Mon 6pm	Danielle Ager		Details	No Discounts
☑	Nov 1, 2022	80.00	November	Hip Hop	2022 Fall	Ager	Hip Hop/Funk - Wed 7pm	Danielle Ager		Details	No Discounts

Find Families Who Have Been Omitted

There are two ways you can review which families have the *Omit Family from Transactions* setting selected (on).

All Families

Use the Filter icon ⊽ on the **All Families** page (*Families* menu) to open the Filter Drawer. In the search field at the top of the drawer, enter the word "omit," and the two filters will display.

Select an option to be brought to the filters where you can select one or both to create a listing of all families with the *Omit Families from Transactions* settings selected on the *Billing Info* tab of their *Family* record.

Jackrabbit

DASHBOARDS | FAMILIES | STUDENTS | CLASSES | EVENTS

All Families

ALL FAMILIES ›

LOCATIONS   STATUS   ACCOUNTS RECEIVABLE

Filters EXPAND ALL   ✕

omit ✕

Financial Details > Omitted Post Tuition Fees

Financial Details > Omitted ePayments

› Family Details

› Communication Opt-Outs

ⓘ

Save the view as a **Favorite** for a quick reference!

Families Search

From the **Reports** menu > **Find Reports** select the **Families/Students** section and go to the **Families** tab. Select **Search Families**.

Use the Search Criteria**Omitted Post Tuition Fees / Omitted ePayments**to create a listing of all families with the *Omit Families from Transactions* settings selected on the*Billing Info* tab of their*Family* record.

Search Families

← RETURN	✓ SUBMIT

Search Criteria 🔍 Favorites 💾 Save Favorites ✕ Refresh ❓

Location	⌄
Status	Active ⌄
Family Name	

City [   ] State [ ] Zip [   ] Neighborhood [   ]

Has Family Discount	⌄	Has Family Fixed Fee	⌄
Has Family Discount Rule	⌄		
Omitted Post Tuition Fees	Yes ⌄		
Omitted ePayments	Yes ⌄		
Problem Account	⌄	Has Billing Instructions ⌄	Has no Billing Contact ⌄	Has no Email ⌄