

# Inactivate Food Service Accounts

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This functionality is only available to customers who have purchased Campus Point of Sale as add-on functionality.

**Classic View:** Point of Sale > Account Maintenance > Account Management Wizard

**Search Terms:** Account Management

Inactivating an account clears the **Active** checkbox on the patron's [Account Info](#) tab. Inactive accounts do not appear on POS terminals.

## Student Accounts

The Account Management Wizard inactivates Student Accounts when a student does not have a current active or future-dated active enrollment. The wizard searches for an Enrollment End Status Code and/or Enrollment End Date depending on the criteria you select. However, if you use the Ad hoc tool to select student accounts, the wizard inactivates all accounts regardless of current or future-dated enrollments.

## Staff Accounts

The Account Management Wizard inactivates staff accounts when the staff member has a District Employment and/or District Assignment record with end dates and no active or future-dated District Employment record or District Assignments.

## Family Accounts

The Account Management Wizard considers the enrollments for all patrons on the account. If ANY patron on the family account has an active enrollment or an active staff record, the account is NOT inactivated. All patrons on family accounts are inactivated with the account if there are no active or future student enrollments or staff employment records found in Campus for the patrons on the account. However, if you use the Ad hoc tool to select accounts, the wizard inactivates all accounts regardless of current or future-dated enrollments or employment records.

This article includes the following topics:

[Inactivate Student Accounts](#) | [Inactivate Staff Accounts](#) | [Account Management Report Example](#)

# Inactivate Student Accounts

1. Select **Inactivate accounts** from the **Mode** dropdown list.

Account Management Wizard ☆
Food Service > Wizards > Account Management Wizard

**Account Management Wizard**

Select Type of accounts to inactivate. Student accounts will be inactivated based on criteria selected. Select Test to preview changes before Run Update.

Mode
Inactivate accounts ▼

Type
  Student
  Staff
  Students and Staff

Ad Hoc Filter

Enrollment End Status
 

00: Used for Fall reporting unless student withdrew prior to fall submission dates  
 13: Student committed to a correctional facility  
 14: Student withdrawn after 15 consecutive days absence  
 16: Student expelled and did not return during the year  
 18: Student withdrew, no transcript requested, or transferred to a non-approved nonpublic school  
 20: Student transferred to another district/state but did not move  
 21: Early childhood withdrawal, IFSP/IEP objectives were met

Grade
 

All ▲  
 01  
 02  
 03  
 04  
 05  
 06 ▼

CTRL-click or SHIFT-click to select multiple

Use Ended Enrollments

School Year
  23-24 ▼

Include Patron Detail

Test
Run Update

2. Complete one of the following account selection options.

Option	Description
Select one of the <b>Type</b> radio buttons	<ul style="list-style-type: none"> <li>- <b>Student</b>. This option inactivates student accounts only.</li> <li>- <b>Students and Staff</b>. This option inactivates student accounts and staff accounts.</li> </ul>
Select an <b>Ad hoc Filter</b>	<p>This option allows you to select an <b>ad hoc filter</b> that you have made to select staff and/or students. The filter you select overrides and hides all other criteria on the screen. Go to step 4.</p> <p>The Ad hoc tool uses the year/school/calendar selected in the top toolbar in Campus. If you do not select All Schools/All Calendars, the Ad hoc tool will use the specific Year, School and Calendar selected in the toolbar. If you do not have <b>Tool Rights</b> to All Schools and All Calendars, Ad hoc will generate based on the specific year, school and calendar selected in the toolbar. When you use the Ad hoc option, the wizard inactivates all accounts regardless of current or future-dated enrollments or employment records. Ad hoc can also be used to inactivate accounts for patrons who have no enrollment or employment record.</p>

3. Use the information in the following table to complete the fields on the wizard:

Field	Description
<b>Enrollment End Status</b>	Select the End Status(es) (entered on the <a href="#">Enrollments</a> tab) for the student. If you do not select an Enrollment End Status, you must select the <b>Use Ended Enrollments</b> checkbox. End Statuses vary by state.
<b>Grade</b>	Select the grade(s) for which you want to inactivate accounts. Only student's accounts that also meet the selected Enrollment End Status and/or Enrollment End Date will be inactivated.
<b>Use Ended Enrollments</b>	Mark this checkbox to inactivate student accounts with enrollment end dates earlier than today's date. When you select this option, the Account Management Wizard will NOT inactivate any accounts where a student has today's date or a future date as an end date on their enrollment.
<b>School Year</b>	Select the school year for which you want to inactivate accounts. The default selection is the current school year.

- Mark the **Include Patron Detail** checkbox to include details like the account numbers and names on the [Account Management Report](#). (optional)
- Click the **Test** button.

**Result**

The Account Management Wizard tests the update and displays the [Account Management Report](#).

Testing is required before the **Run Update** button becomes active. No data is written to the database.

- Review the [Account Management Report](#).
- Click the **Run Update** button to inactivate accounts.

**Result**

A confirmation window displays.

- Click **OK**.

**Result**

The Account Management Wizard clears the **Active** checkbox on the patron(s) [Account Info](#) tab and displays the [Account Management Report](#).

## Inactivate Staff Accounts

The Account Management Wizard inactivates staff accounts when the staff member has a District Employment and/or District Assignment record with end dates and no active or future-dated District Employment record or District Assignments.

1. Select **Inactivate accounts** from the **Mode** dropdown list.
2. Complete one of the following account selection options.

Option	Description
Select one of the <b>Type</b> radio buttons.	<ul style="list-style-type: none"> <li>- <b>Staff</b>. This option inactivates staff accounts only.</li> <li>- <b>Students and Staff</b>. This option inactivates student accounts and staff accounts.</li> </ul>
Select an <b>Ad hoc Filter</b> .	<p>This option allows you to select an <a href="#">ad hoc filter</a> that you have made to select staff and/or students.</p> <p>If you do not select All Schools/All Calendars, the Ad hoc tool will use the specific Year, School and Calendar selected in the toolbar. If you do not have <a href="#">Tool Rights</a> to All Schools and All Calendars, Ad hoc will generate based on the specific year, school and calendar selected in the toolbar. When you use the Ad hoc option, the wizard inactivates all accounts regardless of current or future-dated enrollments or employment records. Ad hoc can also be used to inactivate accounts for patrons who have no enrollment or employment record.</p>

3. Mark the **Include Patron Detail** checkbox to include details like the account numbers and names on the [Account Management Report](#). (optional)
4. Click the **Test** button.

Testing is required before the **Run Update** button becomes active. No data is written to the database.

### Result

The Account Management Wizard tests and update and displays a the [Account Management Report](#).

- Review the [Account Management Report](#).
- Click the **Run Update** button to inactivate accounts.

**Result**

A confirmation window displays.

- Click **OK**.

**Result**

The Account Management Wizard clears the **Active** checkbox on the patron(s) [Account Info](#) tab and displays the [Account Management Report](#).

## Account Management Report Example

09-10 0347 CAMPUS District 1234 109th Ave NE, Blaine MN 55449 Generated on 08/12/2011 10:13:04 AM Page 1 of 1		Account Management Report Mode: Inactivate Accounts Type: Student Selected: Use Ended Enrollments Grade: 12, PS			
<b>Summary</b>					
Total # of Accounts Inactivated					21
<b>Patron Detail</b>					
Inactive Account #	Patron Name	Grade	Enrollment End Status	Enrollment End Date	# of Patrons on Account
3678	Aden, Shueh	PS	61 Referral to Special Education	09/11/09	1
503	Anderson, Tyler	12	05 Moved out of MN	02/04/10	1
17706-33269	Brasch, Caroline	12	20 Transfer to other district/not moved	09/21/09	1
15082-8932	Christensen, Lydia	12	08 Graduated from High School	07/06/09	1
2386	Citronella, Brandon	12	20 Transfer to other district/not moved	07/08/09	1
3842	Clarmont, Valerie	PS	60 No referral	09/10/09	1
4011	Cofas, Kayla	PS	60 No referral	09/11/09	1
15761-18691	Conrad, Joseph	12	-	07/29/09	1
4020	Dasan, Ayan	PS	60 No referral	09/11/09	1
2569	Jaquez, Clarence	PS	61 Referral to Special Education	09/11/09	1
16076-13656	Jimenez, Jessica	12	-	09/08/09	1
17657-17850	Lara, Lorenzo	12	99 Enrollment Status changed	06/30/09	1
1057	Mulheim, James	12	20 Transfer to other district/not moved	08/10/09	1
1501	Martinez, Enrique	PS	60 No referral	08/28/09	1
15020-8276	Mori, Samantha	12	99 Enrollment Status changed	07/14/09	1
14367-2404	Palmer, Jeremy	12	02 Transfer to another school in district	09/10/09	1
3393	Rus, Zachary	12	99 Enrollment Status changed	07/14/09	1
3810	Sanchez, Madeline	PS	61 Referral to Special Education	09/11/09	1
4083	Soucherey, Charles	12	-	06/30/10	1
3404	Walling, Kristina	12	99 Enrollment Status changed	08/20/09	1
16431-23303	Ward, Akeal	12	22 Care/treatment program w /instruction	09/08/09	1

Account Management Report example of inactivating student accounts (includes patron detail)

Report Section	Description
<b>Summary</b>	<p>This section reports the total number of accounts inactivated.</p> <ul style="list-style-type: none"> <li>If the district uses Family Accounts, the number of accounts reported in the Summary may be different than the number of patrons listed under the Patron Detail section.</li> <li>If the district uses Family Accounts and Enrollment End Status(es) are selected as criteria, the <b>Total of Accounts Inactivated</b> (in the Summary section) may be different than the total count of <b>Enrollment End Status(es)</b> (in the Patron Detail section).</li> </ul>

Report Section	Description
<b>Patron Detail</b>	<ul style="list-style-type: none"> <li>• This section is sorted alphabetically by patron names and includes the following columns.               <ul style="list-style-type: none"> <li>◦ <b>Student Section:</b> Inactive Account , Grade, Enrollment End Status (if any), Enrollment End Date (if any) and of Patrons on Account.</li> <li>◦ <b>Staff Section:</b> Inactive Account and of Patrons on Account.</li> </ul> </li> <li>• The <b>of Patrons on Account</b> column is intended for districts using Family Accounts. If a district uses Family Accounts, the account is only inactivated if at least one of the patrons meet the criteria selected and all remaining patrons on the account have an ended student enrollment or ended staff employment record. Only the patron(s) who meet the criteria selected are listed in the Patron Detail section.</li> </ul>