Adjust Fee Assignments (Fees Wizard)

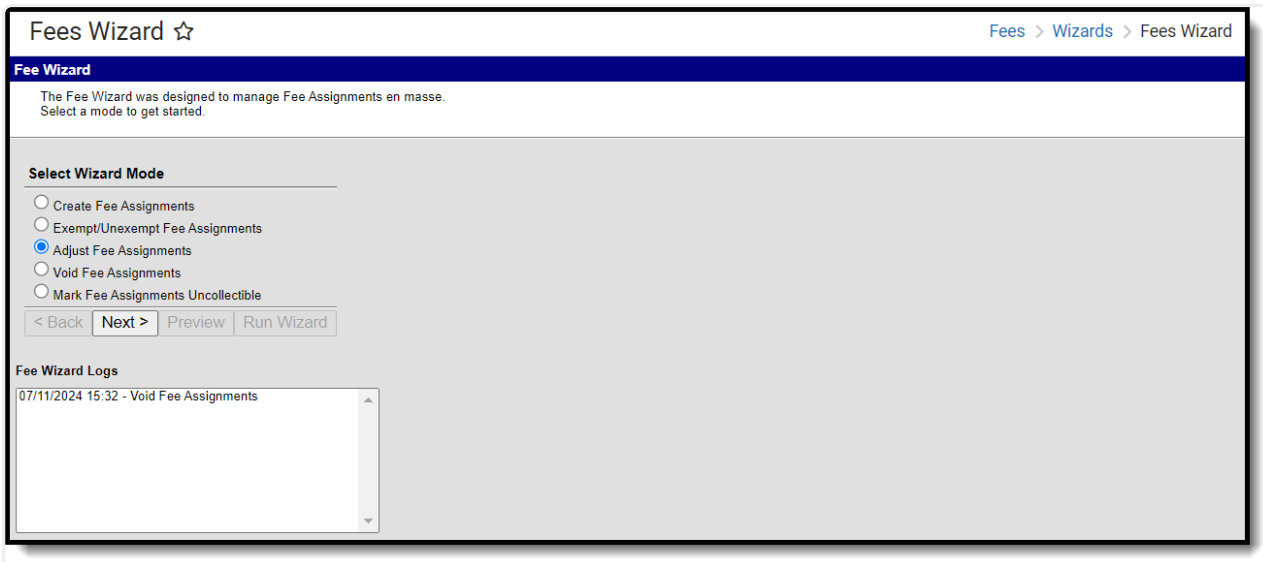
Last Modified on 12/14/2025 8:45 pm CST

Important Information about Adjusting Fees | Adjust Fee Assignments Editor Options | Using the Adjust Fee Assignments Mode

This section applies when the **Adjust Fee Assignments** option was selected in the first step of the Fees Wizard.

Tool Search: Fees Wizard

The Adjust Fee Assignments mode modifies the selected fee for the students matching the selected criteria (enrolled in the selected calendar and grade level or included in the selected ad hoc filter). Adjusted fees are visible on the student's Fees tool. A Fees Wizard log entry is also created and visible from the first page of the Fees Wizard.



Adjust Fee Assignments

Important Information about Adjusting Fees

When adjusting fees, note the following.

- When subtracting an amount, the fee may not be adjusted more than the Fee Assignment amount or the remaining balance, whichever is greater.
- When subtracting a percentage, entered values can be between .001% and 100%.

Adjustment Scenarios

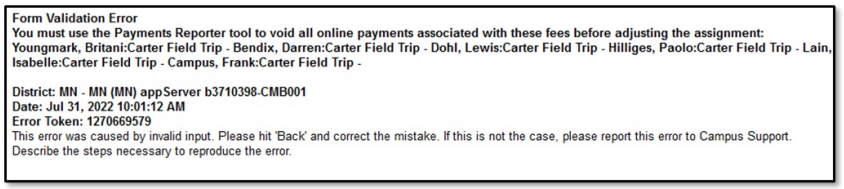
- If a fee assignment does not have child transactions, the balance is adjusted by the value or percentage that you enter.
- If a fee assignment has adjustments, the balance is still adjusted by the value or percentage that you enter.
- No changes can be made to voided fees.
- A fee assignment that has a single payment either in full or partial:
    - If the payment was made in full, the payment will be voided and the money will be noted as a surplus. If the adjustment was not 100% of the fee assignment, the remainder will be auto-paid to the fee assignment in order to pay the fee in full.
    - If the payment was partial, the balance is checked to see if it is greater than or equal to the adjusted amount.
        - If the balance is greater than or equal to the adjusted amount, an adjustment will be created for that fee assignment.
        - If the balance is not greater than or equal to the adjusted amount, the payment is voided and the money is marked as a surplus. The adjustment is made then the fee balance is paid out of the surplus.
- Multiple payments can be made to pay the balance. When adjusting fee assignments, adjustments are made first by type then size of payment. Online payments are voided last.
- An adjustment was made after an online payment was made. There are two ways to handle this:
    - Make a refund for the amount of the adjustment using the Payments Reporter tool.
    - Deposit the amount of the adjustment to the surplus on the Fees tool.

Adjustments to fee assignments are noted on the student's Fees tool on the Edit Fee Assignment window.

Adjust Fee Assignments Editor Options

The following options are available when using the Adjust Fee Assignments mode:

Field	Description
Date	Entered date determines when the fee was adjusted. This date appears on the student's Fees tool. Dates are entered in *mmddyy* format, or use the calendar icon to select a date.

Field	Description
How do you want to handle processing if making the adjustment 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)**: 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.  Form Validation Error You must use the Payments Reporter tool to void all online payments associated with these fees before adjusting 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 - Campus, Frank:Carter Field Trip - District: MN - MN (MN) appServer b3710398-CMB001 Date: Jul 31, 2022 10:01:12 AM Error Token: 1270669579 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. The Fees Wizard will **NOT** deposit the amount of the adjustment to the surplus for that fee assignment. The adjustment amount must be refunded in the Payments Reporter tool for each person listed in the error message. • **Continue processing and void the payment (which will make it nonrefundable in Payments Reporter)**: If a credit card or online payment was made on the fee assignment, marking this option allows the Fees Wizard to deposit the amount of the adjustment to the surplus. The payment can **NOT** be refunded in Payments Reporter.
Select Fees	List of fees that can be assigned to the students.
Subtract Amount	Indicates the value of the adjustment. • Select the **Fixed Amount** option to enter a specific dollar amount that will apply to all students. • Select the **Percentage** option to apply that value of the fee assignment to the adjustment.
Only adjust fees which have no previous adjustments	Mark this checkbox to only adjust those fees that have no other previous adjustments.
Create From/To Date Range	Entered dates are used to adjust those fees created (assigned to the student) during that date range. Dates are entered in *mmddyy* format or 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.
Select Calendars	Students who have active enrollments in the selected calendar will have adjustments made to the selected fee. 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.

Field	Description
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 adjusted.
Type	Indicates the reason for the adjustment. Values are entered in the Attribute/Dictionary.
Comments	Enter comments related to the assignment of the selected fee. Comments appear when selecting a fee from the student's Fees tool on the Edit Fee Assignment window.

Using the Adjust Fee Assignments Mode

Mode Selection

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

Create New Fees

1. Enter a **Date** for the fee. Dates are entered in *mmddyy* format or use the calendar icon to select a date.
2. Determine how to handle adjustments if a payment was made with a credit card or online by selecting the radio button for the option **Stop processing and produce an error** or **Continue processing and void the payment.**
3. Select the **Fee** to adjust.
4. Enter the **Subtract Amount** by selecting the **Fixed Amount** or a **Percentage**.
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.**
8. Select the **Type** from the dropdown list.
9. Enter any **Comments** related to this fee assignment.

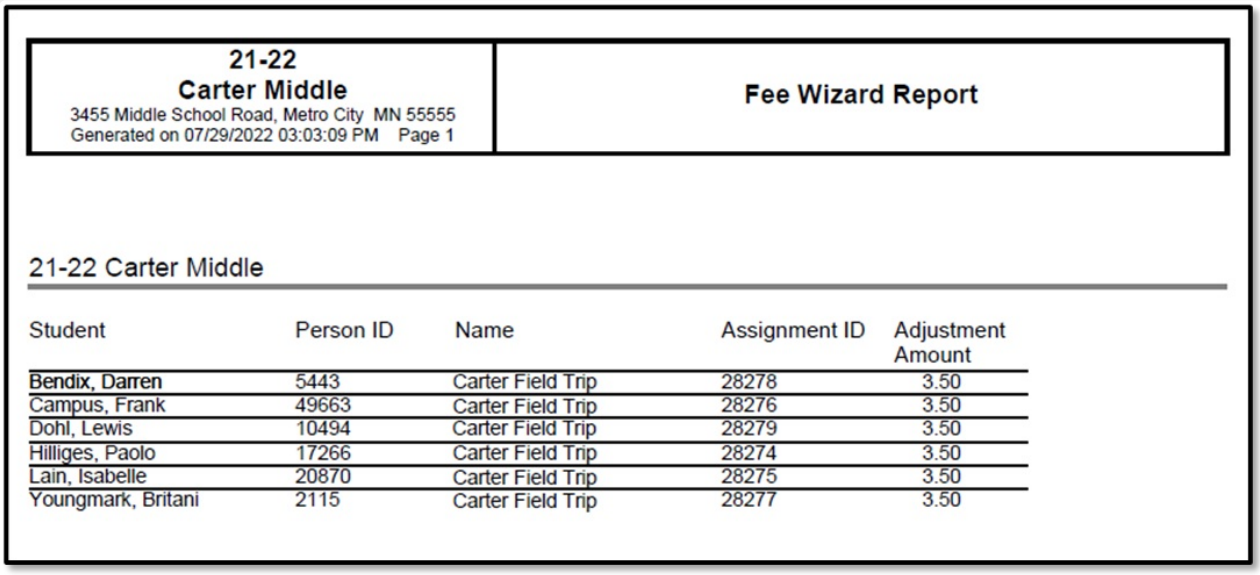
Preview Fee Assignment

1. Click the **Preview** button. A **Fee Wizard Report** displays in a new browser window, listing the students who will be assigned the selected fee.

   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 are not adjusted until the **Run Wizard** button is selected.



21-22
Carter Middle
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Fee Wizard Report

21-22 Carter Middle

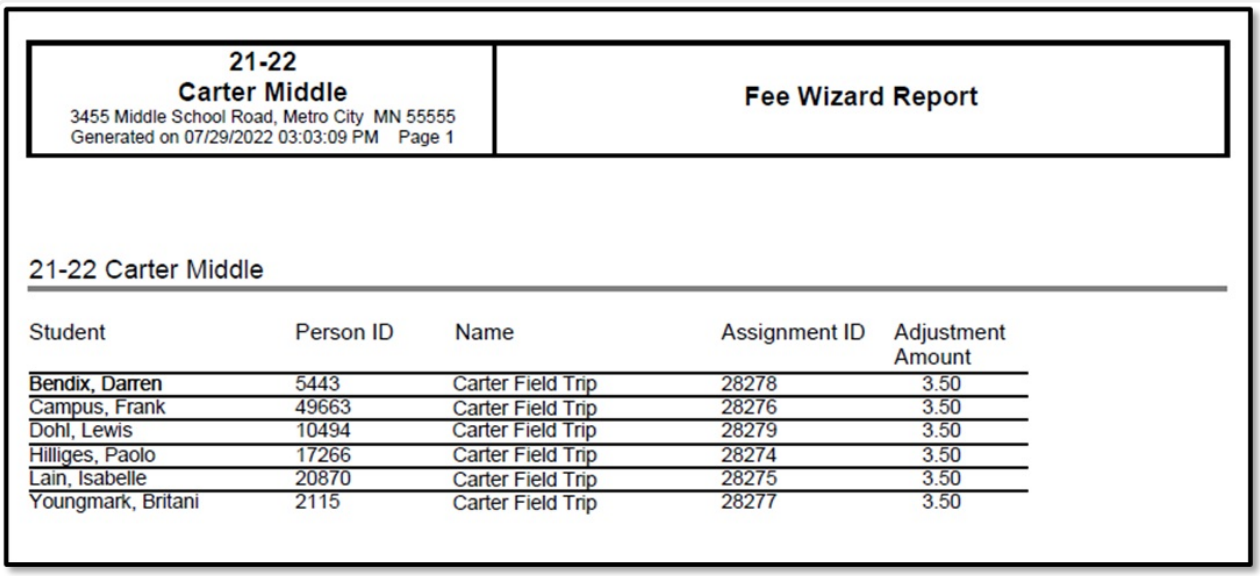
Student	Person ID	Name	Assignment ID	Adjustment Amount
Bendix, Darren	5443	Carter Field Trip	28278	3.50
Campus, Frank	49663	Carter Field Trip	28276	3.50
Dohl, Lewis	10494	Carter Field Trip	28279	3.50
Hilliges, Paolo	17266	Carter Field Trip	28274	3.50
Lain, Isabelle	20870	Carter Field Trip	28275	3.50
Youngmark, Britani	2115	Carter Field Trip	28277	3.50

Fee Adjustment Preview Report

Run Wizard

Click the **Run Wizard** button to assign the selected fees. A **Fees Wizard Report** will display in a new browser window listing the students for whom the selected fee will be adjusted.

This is the only indication a user receives that fees have been adjusted.



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Fee Adjustment Run Wizard Report