## Adjust Fees <br> Last Modified on 03/11/2024 8:46 am CDT

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Fee adjustments are used to modify the amount due for a fee. Fee adjustments may only be made for up to the amount of the fee assignment.


## Make an Adjustment

1. Select the Fee Assignment(s) for which the adjustment is being made.

Result: The Assignment panel displays.
2. Click Make Adjustment button.

Result: The Adjustments panel displays.

3. Enter an Adjustment Date in mmddyyyy format.

Click the date field to open a calendar of the current month which defaults to the current date.
4. If applicable, select the Adjustment Type such as Activity Cancelled, Cost Adjustment or Uncollectible.
5. Enter the amount to be removed from the fee(s) in the Adjustment Amount or \% field.

The subtracted amount cannot exceed the amount of the fee assignment. Enter a dollar amount in the Adjustment Amount field OR a Percentage amount (do not enter the '\%' sign, just numeric up to three decimal points, like 10 or 10.567).
6. Enter any Comments associated with the adjustment.
7. Click Save when finished.

Result: Upon saving, the entered adjustment displays below the fee to which it was applied with the date of the adjustment, the amount deducted in the Credit column.

## Edit an Adjustment

Once an adjustment is made, clicking on the adjustment displays the Adjustment panel which includes the adjusted Fee, the Adjustment Date, the Adjustment Type, any Comments attached to the adjustment, the calendar in which the adjustment was made and the name of the user(s) who created and modified the adjustment.

Only the adjustment Type and Comments can be added or modified in this panel. Click Save when finished.

## Making Adjustments After an Online Payment is Made

Users have the option to void a payment made online using the Fees tool, or refund the payment amount using the Payments Reporter tool.

These options are also available when adjustments are made after a fee assignment was paid online. Below is an example.

1. A parent paid for a fee online for $\$ 100$.

2. An adjustment for $\$ 30$ was made after the payment was made.

| Adjustments |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Adjust All Fees by an Amount | Adjust All Fees by a Percent |  |  |  |  |
|  |  |  | Clear | and Perce |  |
| Adjustment Date * | Adjustment Type |  |  |  |  |
| 07/31/2022 茴 |  |  | - |  |  |
| Fee | Due Date | Fee Amount | Fee Balance | Amount | Percent |
| Headset |  | 5.00 | 0.00 |  |  |
| Instrument Rental | 07/31/2022 | 100.00 | 0.00 | 30.00 |  |

3. This message appears when the amount of the adjustment is refunded to the parent.

4. Clicking Continue does the following:
a. The payment amount of $\$ 100$ is voided and a deposit is made into the surplus.
b. A withdrawal of $\$ 70$ is made to pay for the new fee amount.
c. A surplus of $\$ 30$ remains. The online payment can NOT be refunded in the Payments Reporter tool.

5. Clicking Cancel does not make the adjustment. The adjustment has to be made as a return in Payments Reporter.
