

# Adjust Fees

Last Modified on 10/21/2024 8:20 am CDT

Tool Search: Fees

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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.

Unpaid Fees : \$200.00		Surplus : \$20.00		Assignment							
Years to Print 21-22 x				<b>Fee</b> AD - 16/17 REG FEE GR 9-12							
<table border="1"> <thead> <tr> <th>Year</th> <th>Household Max</th> <th>Student Max</th> </tr> </thead> <tbody> <tr> <td>- 2020</td> <td>800.00</td> <td>450.00</td> </tr> </tbody> </table>				Year	Household Max	Student Max	- 2020	800.00	450.00	<b>Amount</b> 160.00	
Year	Household Max	Student Max									
- 2020	800.00	450.00									
<table border="1"> <thead> <tr> <th>Fee</th> </tr> </thead> <tbody> <tr> <td>+ AD - 16/17 P.E. SHIRTS</td> </tr> <tr> <td>+ AD - 16/17 P.E. SHORTS</td> </tr> <tr> <td>+ DCHS-YEARBOOK</td> </tr> <tr> <td>+ AMS-LOST TEXTBOOK</td> </tr> <tr> <td>+ AD - 16/17 REG FEE GR 9-12</td> </tr> </tbody> </table>				Fee	+ AD - 16/17 P.E. SHIRTS	+ AD - 16/17 P.E. SHORTS	+ DCHS-YEARBOOK	+ AMS-LOST TEXTBOOK	+ AD - 16/17 REG FEE GR 9-12	<b>Balance</b> 160.00	
Fee											
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<table border="1"> <thead> <tr> <th>Surplus</th> <th>Date</th> </tr> </thead> <tbody> <tr> <td>+ Deposit</td> <td>04/14/2021</td> </tr> </tbody> </table>				Surplus	Date	+ Deposit	04/14/2021	<b>Calendar</b> 19-20 Dundee-Crown High School			
Surplus	Date										
+ Deposit	04/14/2021										
				<b>Created By</b> Chavez, Sandra							
				<b>Created Date</b> 4/14/2021 12:38:00 PM							
<input type="button" value="New Fee Assignment"/>		<input type="button" value="Make Payment"/>		<input type="button" value="Make Deposit"/>							
<input type="button" value="Make Refund"/>		<input type="button" value="Make Payment"/>		<input type="button" value="Make Adjustment"/>							
		<input type="button" value="Void"/>		<input type="button" value="Close"/>							

## 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.

**Adjustments**

Adjustment Date \*  
04/15/2021

Adjustment Type \*

Fee	Due Date	Fee Amount	Fee Balance	Amount	Percent
AD - 16/17 REG FEE GR 9-12	04/30/2021	160.00	160.00	<input type="text"/>	<input type="text"/>

Comments  
Maximum 255 characters

3. Enter an **Adjustment Date** in *mmdyyyy* 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.

Student Information > General > Fees

Hausrath, Rafiq Grade: 08 #116145 DOB: 09/18/07 HS Graduation

Unpaid Fees : \$0.00 Surplus : \$0.00 Balance : \$0.00

Years to Print: 21-22 x

Year	Balance
- 22-23	0.00
<b>Fee</b>	
- Instrument Rental	0.00
<b>Due Date</b>	
07/31/2022	
<b>Balance</b>	
0.00	
<b>Description</b>	
Assignment Course	
<b>Date</b>	
07/31/2022	
<b>Debit</b>	
100.00	
<b>Credit</b>	
0.00	
<b>Payment</b>	
Online	
<b>Date</b>	
07/31/2022	
<b>Debit</b>	
0.00	
<b>Credit</b>	
100.00	
+ 21-22	0.00

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 All Amounts and Percents

Adjustment Date \* 07/31/2022

Adjustment Type

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.

Adjustments

Adjust All Fees by an Amount

Adjust All Fees by a Percent

Clear All Amounts and Percents

Adjustment Date \* 07/31/2022

Fee

Headset

Instrument Rental

Comments  
Maximum 255 characters




Make Adjustment Cancel

**Void Online Payments** x

There are online payments associated with this fee. Pressing "Continue" will create a deposit into the student's surplus and will make the payment nonrefundable in the Payments Reporter tool.

Continue Cancel

4. Clicking **Continue** does the following:


**Fees** ☆ Student Information > General > Fees  
 Hausrath, Rafiq  Grade: 08 #116145 DOB: 09/18/07  
 HS Graduation Related Tools ^

Unpaid Fees : \$0.00 c Surplus : \$30.00 Balance : -\$30.00

Years to Print  
 21-22 x

Year			Balance
-	22-23		- 30.00

Fee	Due Date	Balance
- Instrument Rental	07/31/2022	0.00

Description	Type	Date	Debit	Credit
Assignment	Course	07/31/2022	100.00	0.00
Payment	Online	07/31/2022	0.00	100.00
<span style="color: red; font-weight: bold;">a</span> Void Payment	Parent Fee Adjusted	07/31/2022	100.00	0.00
<span style="color: red; font-weight: bold;">b</span> Payment	In Office	07/31/2022	0.00	70.00
Adjustment		07/31/2022	0.00	30.00

[New Fee Assignment](#) [Make Payment](#) [Make Deposit](#) [Make Refund](#) [Make Adjustments](#) [Documents](#) [Print](#)

- 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](#).