Adjust Fees

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

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.