

# Student Record Member Credits

Last Modified on 07/14/2026 9:54 am CDT

## Member Credits

Users can view credits to a student account.

Member Credits

Balance as of

6/25/2026

CA

Total Received:

\$25.00

Total Adjustments:

\$0.00

Total Applied:

\$0.00

Remaining Balance:

\$25.00

Hide Detail

Member Credit Transaction Details

| NAME            | TYPE       | EFFECTIVE DATE | AMOUNT  | ACTIONS |
|-----------------|------------|----------------|---------|---------|
| Mistaken Charge | Credit - O | 06/25/2026     | \$25.00 | View    |

Add Credit

Add Adjustment

*Dependent Care Member Credits*

## Member Credits Fields

| Field                    | Description                                                                                                                                                                                                                                                                                |
|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Balance as of</b>     | Determines the date for which to view credit balances. All credits to the account as of the date selected are displayed.                                                                                                                                                                   |
| <b>Total Received</b>    | Total dollar amount of all credits to the account, both assigned and unassigned.                                                                                                                                                                                                           |
| <b>Total Adjustments</b> | Total dollar amount of any adjustments made to the account, both assigned and unassigned.                                                                                                                                                                                                  |
| <b>Total Applied</b>     | Total dollar amount of all credits and adjustments assigned to the account.                                                                                                                                                                                                                |
| <b>Remaining Balance</b> | Total dollar amount of credits not yet assigned to the account.                                                                                                                                                                                                                            |
| <b>View/Hide Detail</b>  | For a more detailed view of the account credits and adjustments, assigned and unassigned credits and adjustments, press <b>View Detail</b> .<br>To view only a summary of the account credits and adjustments, assigned and unassigned credits and adjustments, press <b>Hide Detail</b> . |

## Add a Member Credit

Users can add a member credit to the account.

1. Press **Add Credit**.

### Add Member Credit

**Credit Name: (Required)**

**Credit Type: (Required)**

▼

**Effective Date: (Required)**

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**Credit Amount: (Required)**

**Comments:**

Save

Cancel

*Add a Member Credit Editor*

2. Enter a name to describe the issued credit in the **Credit Name** field.
3. Use the **Credit Type** drop-list to select the type of credit being issued.
4. In the **Effective Date** field, enter the date on which to issue the member credit.
5. Enter the dollar amount to credit the account in the **Credit Amount** field.
6. Use the **Comments** field to enter the reason the credit is being issued.
7. Press **Save** to save the credit to the account. Press **Cancel** to exit without saving the credit to the account.

## Add Member Credit Fields

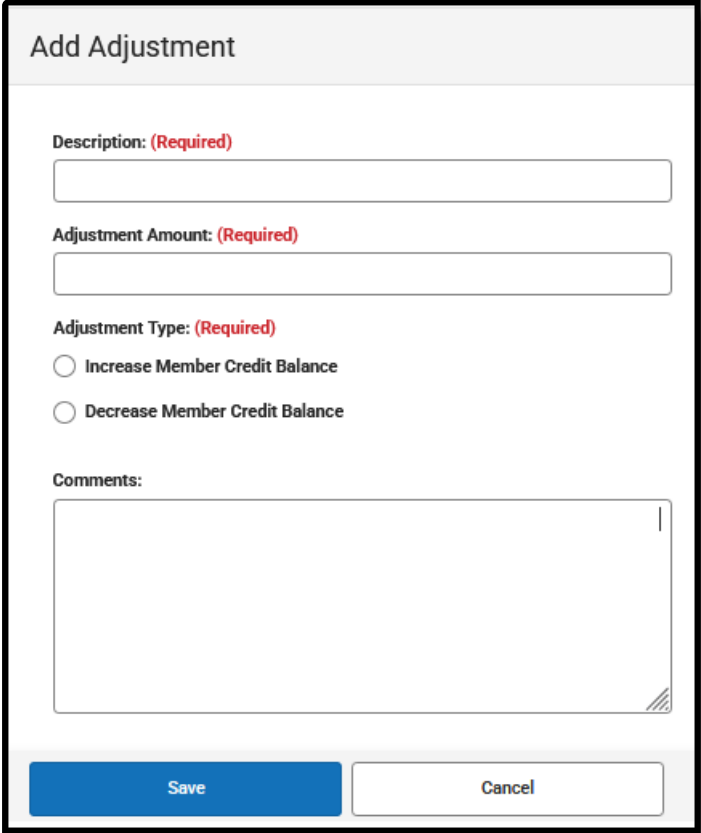
| Field                                    | Description                                                                                                                        |
|------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|
| <b>Credit Name</b><br><i>Required</i>    | Name of the Credit being made to the account.                                                                                      |
| <b>Credit Type</b><br><i>Required</i>    | Type of Credit being issued. Users may configure the credit types in the Attribute Dictionary under Dependent Care > Credit Types. |
| <b>Effective Date</b><br><i>Required</i> | Date on which the credit is available for application to the account.                                                              |

| Field                                   | Description                                   |
|-----------------------------------------|-----------------------------------------------|
| <b>Credit Amount</b><br><i>Required</i> | The dollar amount of the credit being issued. |
| <b>Comments</b>                         | The reason the credit is being issued.        |

## Add a Member Adjustment

Use the Add Adjustment option to make an adjustment to a member account.

1. Press **Add Adjustment**.



*Add Member Adjustment*

2. Use the **Description** field to enter a description of the adjustment being made.
3. Enter the total dollar amount of the adjustment in the **Adjustment Amount** field.
4. Use the radio buttons to indicate the type of adjustment being made in the **Adjustment Type** fields.
  - Mark the **Increase Member Credit Balance** option if the adjustment is meant to credit the member account.
  - Mark the **Decrease Member Credit Balance** if the adjustment is meant to debit the account.
5. Use the **Comments** field to enter the reason the adjustment is being made.
6. Press **Save** to save the adjustment to the account. Press **Cancel** to exit without saving the adjustment to the account.

## Member Adjustment Fields

| Field                                       | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                |                 |             |                                       |                                                                                         |                                       |                                                                                 |
|---------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|-------------|---------------------------------------|-----------------------------------------------------------------------------------------|---------------------------------------|---------------------------------------------------------------------------------|
| <b>Description</b><br><i>Required</i>       | A description of the adjustment being made to the account.                                                                                                                                                                                                                                                                                                                                                                                                 |                 |             |                                       |                                                                                         |                                       |                                                                                 |
| <b>Adjustment Amount</b><br><i>Required</i> | The total dollar amount of the adjustment being made to the account.                                                                                                                                                                                                                                                                                                                                                                                       |                 |             |                                       |                                                                                         |                                       |                                                                                 |
| <b>Adjustment Type</b><br><i>Required</i>   | How the adjustment being made (credit or debit) will affect the account. <table> <tr> <th>Adjustment Type</th><th>Description</th></tr> <tr> <td><b>Increase Member Credit Balance</b></td><td>The adjustment is meant to credit the member account and increase their credit balance.</td></tr> <tr> <td><b>Decrease Member Credit Balance</b></td><td>The adjustment is meant to debit the account and decrease their credit balance.</td></tr> </table> | Adjustment Type | Description | <b>Increase Member Credit Balance</b> | The adjustment is meant to credit the member account and increase their credit balance. | <b>Decrease Member Credit Balance</b> | The adjustment is meant to debit the account and decrease their credit balance. |
| Adjustment Type                             | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                |                 |             |                                       |                                                                                         |                                       |                                                                                 |
| <b>Increase Member Credit Balance</b>       | The adjustment is meant to credit the member account and increase their credit balance.                                                                                                                                                                                                                                                                                                                                                                    |                 |             |                                       |                                                                                         |                                       |                                                                                 |
| <b>Decrease Member Credit Balance</b>       | The adjustment is meant to debit the account and decrease their credit balance.                                                                                                                                                                                                                                                                                                                                                                            |                 |             |                                       |                                                                                         |                                       |                                                                                 |
| <b>Comments</b>                             | The reason the adjustment is being made to the account.                                                                                                                                                                                                                                                                                                                                                                                                    |                 |             |                                       |                                                                                         |                                       |                                                                                 |