

# Adjust Fees

Last Modified on 10/22/2022 9:31 am CDT

**Classic View:** Student Information > General > Fees

**Search Terms:** Fees

[Make an Adjustment](#) | [Edit an Adjustment](#) | [Making Adjustments After an Online Payment is Made](#)

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                                     |                          |                          |                 |   |                              |                          |  |
|--|---------------|---|--|--|--------------------------|--------------------------|-----------------|---|------------------------------|--------------------------|--|
| <b>Years to Print</b><br>21-22 x   |               |   |  | <b>Fee</b><br>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><br>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><br>160.00 |  |
| 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   |               |   |  |  |                          |                          |                 |   |                              |                          |  |
| <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><br>19-20 Dundee-Crown High School |                              |                          |  |
| Surplus  | Date          |   |  |  |                          |                          |                 |   |                              |                          |  |
| + Deposit  | 04/14/2021    |   |  |  |                          |                          |                 |   |                              |                          |  |
|  |               |   |  | <b>Created By</b><br>Chavez, Sandra            |                          |                          |                 |   |                              |                          |  |
|  |               |   |  | <b>Created Date</b><br>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"/> |         |

Comments  
Maximum 255 characters

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.

| Year  | Balance    |             |          |         |                     |            |            |        |            |        |      |         |        |            |      |        |
|---|------------|-------------|----------|---------|---------------------|------------|------------|--------|------------|--------|------|---------|--------|------------|------|--------|
| - 22-23   | 0.00       |             |          |         |                     |            |            |        |            |        |      |         |        |            |      |        |
| <table border="1"> <thead> <tr> <th>Fee</th> <th>Due Date</th> <th>Balance</th> </tr> </thead> <tbody> <tr> <td>- Instrument Rental</td> <td>07/31/2022</td> <td>0.00</td> </tr> </tbody> </table>  |            | Fee         | Due Date | Balance | - Instrument Rental | 07/31/2022 | 0.00       |        |            |        |      |         |        |            |      |        |
| Fee   | Due Date   | Balance     |          |         |                     |            |            |        |            |        |      |         |        |            |      |        |
| - Instrument Rental   | 07/31/2022 | 0.00        |          |         |                     |            |            |        |            |        |      |         |        |            |      |        |
| <table border="1"> <thead> <tr> <th>Description</th> <th>Type</th> <th>Date</th> <th>Debit</th> <th>Credit</th> </tr> </thead> <tbody> <tr> <td>Assignment</td> <td>Course</td> <td>07/31/2022</td> <td>100.00</td> <td>0.00</td> </tr> <tr> <td>Payment</td> <td>Online</td> <td>07/31/2022</td> <td>0.00</td> <td>100.00</td> </tr> </tbody> </table> |            | Description | Type     | Date    | Debit               | Credit     | Assignment | Course | 07/31/2022 | 100.00 | 0.00 | Payment | Online | 07/31/2022 | 0.00 | 100.00 |
| Description   | Type       | Date        | Debit    | Credit  |                     |            |            |        |            |        |      |         |        |            |      |        |
| Assignment  | Course     | 07/31/2022  | 100.00   | 0.00    |                     |            |            |        |            |        |      |         |        |            |      |        |
| Payment   | Online     | 07/31/2022  | 0.00     | 100.00  |                     |            |            |        |            |        |      |         |        |            |      |        |
| + 21-22   | 0.00       |             |          |         |                     |            |            |        |            |        |      |         |        |            |      |        |


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

| 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.

Fees ☆ Student Information > General > Fees

Hausrath, Rafiq  Grade: 08 #116145 DOB: 09/18/07 Related Tools ^

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

Years to Print  
21-22 ✕

| 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;">a</span> Void Payment | Parent Fee Adjusted | 07/31/2022 | 100.00 | 0.00   |
| <span style="color: red;">b</span> Payment      | In Office           | 07/31/2022 | 0.00   | 70.00  |
| Adjustment                                      |                     | 07/31/2022 | 0.00   | 30.00  |

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

## Previous Version

[Adjust Fees \[.2211 - .2227\]](#)