

Adjust Fees

Last Modified on 10/22/2022 9:48 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							
Years to Print 21-22 x				Fee 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	Amount 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	Balance 160.00	
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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	Calendar 19-20 Dundee-Crown High School			
Surplus	Date										
+ Deposit	04/14/2021										
				Created By Chavez, Sandra							
				Created Date 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 *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> <tr> <td colspan="3"> <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> </td> </tr> </tbody> </table>		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
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+ 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.

Void Online Payments ✕

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.

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
a Void Payment	Parent Fee Adjusted	07/31/2022	100.00	0.00
b 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](#)

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

Previous Version

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