Adjust Fee Assignments (Fees Wizard) [.2124 - .2227]

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> You are viewing a previous version of this article. See Adjust Fee Assignments (Fees Wizard) for the most current information.
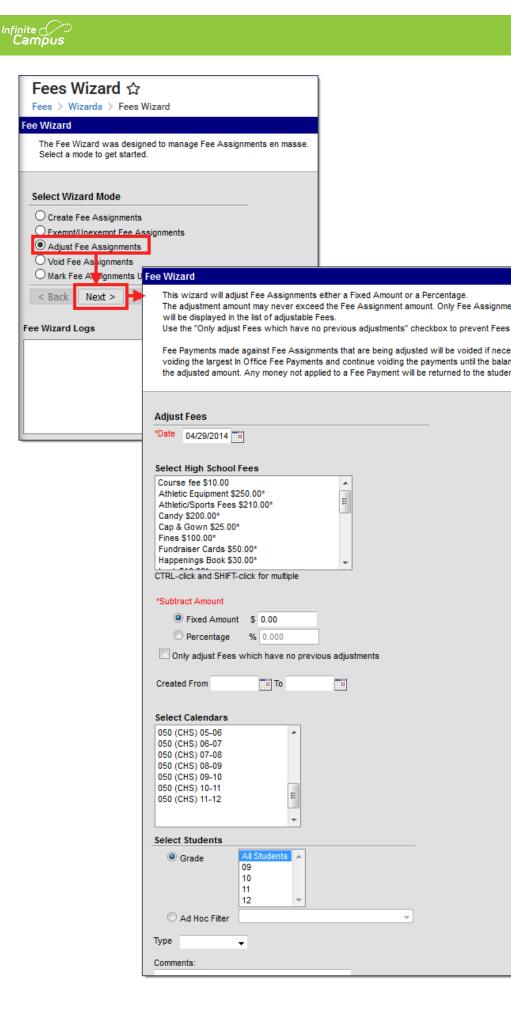
Important Information about Adjusting Fees | Adjust Fee Assignments Editor Options | Using the Adjust Fee Assignments Mode

> This section applies when the **Adjust Fee Assignments** option was selected in the first step of the Fees Wizard.

Classic View: Fees > Wizards > Fee Wizard

Search Terms: Fee Wizard

The Adjust Fee Assignments mode modifies the selected fee for the students matching the selected criteria (enrolled in the selected calendar and grade level or included in the selected ad hoc filter). Adjusted fees are visible on the student's Fees tab. A Fees Wizard log entry is also created and visible from the first page of the Fees Wizard.

Fees Wizard ☆

Fee Wizard

The Fee Wizard was designed to manage Fee Assignments en masse. Select a mode to get started.

Select Wizard Mode

- ○ Create Fee Assignments
- ○ Exempt/Unexempt Fee Assignments
- ◉ Adjust Fee Assignments
- ○ Void Fee Assignments
- ○ Mark Fee Assignments U

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Fee Wizard Logs

Fee Wizard

This wizard will adjust Fee Assignments either a Fixed Amount or a Percentage.
The adjustment amount may never exceed the Fee Assignment amount. Only Fee Assignme
will be displayed in the list of adjustable Fees.
Use the "Only adjust Fees which have no previous adjustments" checkbox to prevent Fees

Fee Payments made against Fee Assignments that are being adjusted will be voided if nece
voiding the largest In Office Fee Payments and continue voiding the payments until the balan
the adjusted amount. Any money not applied to a Fee Payment will be returned to the studen

Adjust Fees

*Date 04/29/2014 🔲

Select High School Fees

```
Course fee $10.00
Athletic Equipment $250.00*
Athletic/Sports Fees $210.00*
Candy $200.00*
Cap & Gown $25.00*
Fines $100.00*
Fundraiser Cards $50.00*
Happenings Book $30.00*
```
CTRL-click and SHIFT-click for multiple

***Subtract Amount**

- ◉ Fixed Amount $ 0.00
- ○ Percentage   % 0.000
- ☐ Only adjust Fees which have no previous adjustments

Created From [🔲] To [🔲]

Select Calendars

```
050 (CHS) 05-06
050 (CHS) 06-07
050 (CHS) 07-08
050 (CHS) 08-09
050 (CHS) 09-10
050 (CHS) 10-11
050 (CHS) 11-12
```

Select Students

- ◉ Grade
  ```
  All Students
  09
  10
  11
  12
  ```
- ○ Ad Hoc Filter [▼]

Type [▼]

Comments:

Important Information about Adjusting Fees

When adjusting fees, note the following.

- When subtracting an amount, the fee may not be adjusted more than the Fee Assignment amount or the remaining balance, whichever is greater.
- When subtracting a percentage, entered values can be between .001% and 100%.

Adjustment Scenarios

- If a fee assignment does not have child transactions, the balance is adjusted by the value or percentage that you enter.
- If a fee assignment has adjustments, the balance is still adjusted by the value or percentage that you enter.
- No changes are made to voided fees.
- A fee assignment that has a single payment either in full or partial:
  - If the payment was made in full, the payment will be voided and the money will be noted as a surplus. If the adjustment was not 100% of the fee assignment, the remainder will be auto-paid to the fee assignment in order to pay the fee in full.
  - If the payment was partial, the balance is checked to see if it is greater than or equal to the adjusted amount.
    - If the balance is greater than or equal to the adjusted amount, an adjustment will be created for that fee assignment.
    - If the balance is not greater than or equal to the adjusted amount, the payment is voided and the money is marked as a surplus. The adjustment is made then the fee balance is paid out of the surplus.
- Multiple payments can be made to pay the balance. When adjusting fee assignments, adjustments are made first by type then size of payment. Online payments are voided last.

Adjustments to fee assignments are noted on the student's Fees tab on the Edit Fee Assignment window.

Adjust Fee Assignments Editor Options

The following options are available when using the Adjust Fee Assignments mode:

Field	Description
Date	Entered date determines when the fee was adjusted. This date appears on the student's Fees tab. Dates are entered in *mmddyy* format, or use the calendar icon to select a date.
Select Fees	List of fees that can be assigned to the students.

Field	Description
Subtract Amount	Indicates the value of the adjustment. • Select the **Fixed Amount** option to enter a specific dollar amount that will apply to all students. • Select the **Percentage** option to apply that value of the fee assignment to the adjustment.
Only adjust fees which have no previous adjustments	Mark this checkbox to only adjust those fees that have no other previous adjustments.
Create From/To Date Range	Entered dates are used to adjust those fees created (assigned to the student) during that date range. Dates are entered in *mmddyy* format or use the calendar icon to select a date. The From Date must be same as or before the To Date; the To Date must be the same as or after the From Date. For example, a From Date of 03/05/2013 requires the To Date to either be 03/05/2013 or after 03/05/2013.
Select Calendars	Students who have active enrollments in the selected calendar will have adjustments made to the selected fee. The Year and School selected in the Campus toolbar will automatically be selected. If a school is not selected in the Campus toolbar, all calendars for all years appear in the calendar list.
Select Students	Students can be selected by a Grade Level or an Ad hoc Filter. If a school is selected in the Campus toolbar, only those grade levels in the selected school are available for selection. When an ad hoc filter is selected, only those students included in the filter will have fees adjusted.
Type	Indicates the reason for the adjustment. Values are entered in the Attribute/Dictionary.
Comments	Enter comments related to the assignment of the selected fee. Comments appear when selecting a fee from the student's Fees tab on the Edit Fee Assignment window.

Using the Adjust Fee Assignments Mode

Mode Selection

1. Select the **Adjust Fee Assignment Mode** from the main Fees Wizard page.
2. Click the **Next** button. The **Adjust Fees** editor displays.

Create New Fees

1. Enter a **Date** for the fee. Dates are entered in *mmddyy* format or use the calendar icon to select a date.
2. Select the **Fee** to adjust.
3. Enter the **Subtract Amount** by selecting the **Fixed Amount** or a **Percentage**.
4. Enter a **Created From** date and a **Created To** date.
5. Select the **Calendar**.
6. Select the **Students** either by **Grade level** or an **Ad hoc filter.**
7. Select the **Type** from the dropdown list.
8. Enter any **Comments** related to this fee assignment.

Preview Fee Assignment

1. Click the **Preview** button. A **Fee Wizard Report** displays in a new browser window, listing the students who will be assigned the selected fee.
2. Return to the **Fees Wizard** window to assign the fees.

> Fees are not adjusted until the **Run Wizard** button is selected.

2011-12 Elementary Generated on 03/14/2012 12:43:08 PM Page 1	Fee Wizard Report

2011-12 Elementary

Student	Person ID	Name	Assignment ID	Adjustment Amount
Student, Morgan	123456	Book Fee	219143	0.50
Student, Dylan	234567	Book Fee	219144	0.50
Student, Alan	345678	Book Fee	219126	0.50
Student, Hannah	456789	Book Fee	219164	0.50
Student, Jabar	567890	Book Fee	219131	0.50
Student, Caleb	678901	Book Fee	219097	0.50
Student, Heather	789012	Book Fee	219119	0.50
Student, Karissa	890123	Book Fee	219195	0.50
Student, Zachary	901234	Book Fee	219128	0.50
Student, Gabriel	012345	Book Fee	219112	0.50
Student, Nicholas	098765	Book Fee	219082	0.50
Student, Angela	987654	Book Fee	219156	0.50
Student, Colin	876543	Book Fee	219170	0.50
Student, Jada	765432	Book Fee	219193	0.50

Fee Adjustment Preview Report

Run Wizard

Click the **Run Wizard** button to assign the selected fees. A **Fees Wizard Report** will display in a new browser window listing the students for whom the selected fee will be adjusted.

This is the only indication a user receives that fees have been adjusted.

2011-12 Elementary

Student	Person ID	Name	Assignment ID	Adjustment Amount
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Student, Hannah	456789	Book Fee	219164	0.50
Student, Jabar	567890	Book Fee	219131	0.50
Student, Caleb	678901	Book Fee	219097	0.50
Student, Heather	789012	Book Fee	219119	0.50
Student, Karissa	890123	Book Fee	219195	0.50
Student, Zachary	901234	Book Fee	219128	0.50
Student, Gabriel	012345	Book Fee	219112	0.50
Student, Nicholas	098765	Book Fee	219082	0.50
Student, Angela	987654	Book Fee	219156	0.50
Student, Colin	876543	Book Fee	219170	0.50
Student, Jada	765432	Book Fee	219193	0.50

Fee Adjustment Run Wizard Report