Adjust a Payment

You should only adjust a payment if the error is found after the reconciliation / closeout procedure has been completed for the day or if the error is not found on the same day of the original transaction. The Cancel functionality should be used if the error is found on the same day prior to close out (see separate QRC for Record and Cancel Payments).

Note: Unless specifically directed, never adjust an Online payment. This would only happen when a payment has failed.

Adjust a Payment

From your UR Student Home Page
1. Enter the student name or UR ID in Search
2. Select Student from the categories list
3. Click the student’s name link
4. Click Student Financials (left blue column)
5. Click Account Transactions (upper tabs)
6. Locate the payment to be adjusted
7. Hover over the payment and click Related Actions ( ) icon
8. Click Student Payment for Charges Adjustment, select Edit Payment
9. Enter the correct amount in the Amount field
   Note: Enter the correct amount in its totality. UR Student will calculate the difference for you automatically
10. On the Payment Adjustment Reason drop-down, specify the type of adjustment
    Note: Always select Error in Original Transaction unless directed otherwise
11. Click OK
12. Click Done on the confirmation screen