

Adjust a Payment

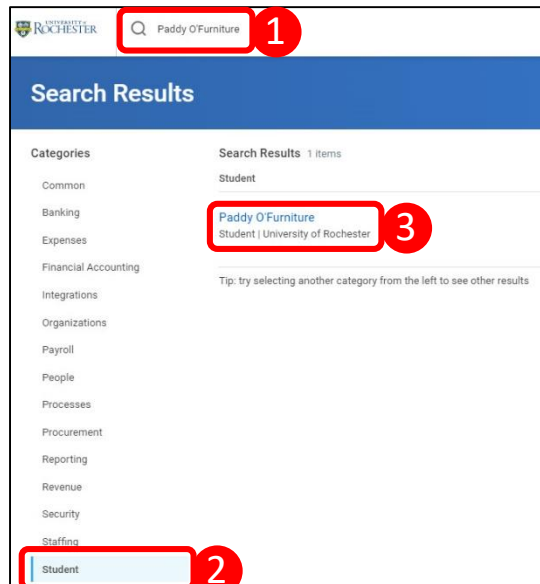
You should only adjust a payment if the error is found after the reconciliation / closeout procedure has been completed for the day or if the error is not found on the same day of the original transaction. The Cancel functionality should be used if the error is found on the same day prior to close out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

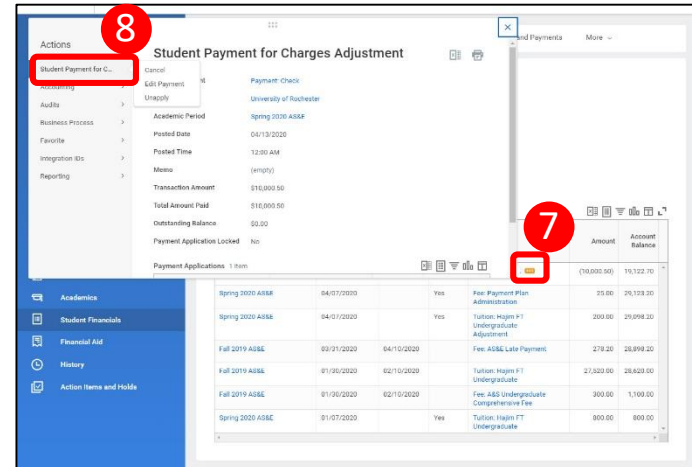
1. Enter the student name or UR ID in Search
2. Select **Student** from the categories list
3. Click the student's name link



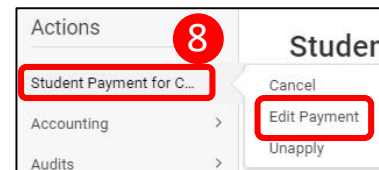
The screenshot shows the search results for 'Paddy O'Furniture'. The search bar contains the name 'Paddy O'Furniture' (1). The search results show 'Student' (2) under the 'Categories' section. The 'Student' category is selected, and the search results list 'Paddy O'Furniture Student | University of Rochester' (3).

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**



The screenshot shows the 'Student Payment for Charges Adjustment' page. The 'Actions' menu is open, and 'Student Payment for C...' (8) is selected. The page displays a table of transactions. A payment is highlighted, and the 'Related Actions' icon (7) is visible.



The screenshot shows the 'Student Payment for Charges Adjustment' page. The 'Actions' menu is open, and 'Student Payment for C...' (8) is selected. The 'Edit Payment' option is highlighted (10).

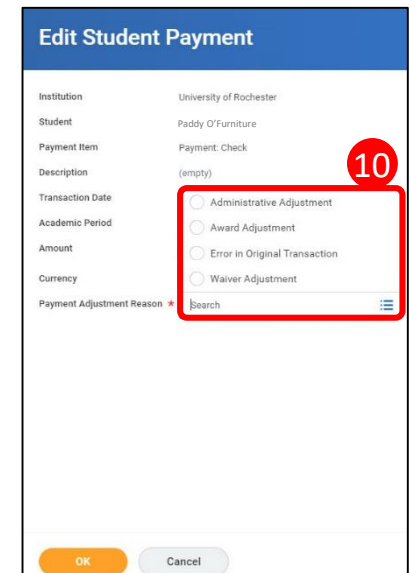
9. Enter the correct amount in the Amount field

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



The screenshot shows the 'Edit Student Payment' page. The 'Payment Adjustment Reason' drop-down menu is open, and 'Error in Original Transaction' is selected (10). The 'OK' button is visible at the bottom.