Manually Adjust a Charge

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 charge to be adjusted
7. Hover over the charge and click Related Actions ( ) icon
8. Click Student Charge, select Adjust

9. Click Charge Adjustment Reason and select the adjustment reason
10. In the Amount field, enter the new Amount total. Enter the adjusted total, not the difference
11. Click OK
12. Click Done on the confirmation screen
13. Add a note on the student’s account explaining the reason for adjustment. See separate QRC for Create a Note.

In general, charges should not be adjusted manually. The Bursar staff should only manually adjust a charge based on well-defined policy or written authorization. When you do manually adjust a charge, you must create a note on the student’s account to explain why the manual charge adjustment was made.