

After you have entered contributions into Crimson, you have the ability to make adjustments within the money record. When you click the **Adjust** button, the drop-down menu will give you options on the types of adjustments you can make to a donor's contribution which are listed below.

The screenshot shows a web form titled "Adjustment" with a help icon. It contains three input fields: "Adjustment Type" (a dropdown menu), "Adjustment Date" (a date picker), and "Adjustment Amount" (a text field with a dollar sign). Below these fields is a prominent blue button labeled "Adjust". Underneath the button is another dropdown menu labeled "Adjustment" which is open, displaying a list of 16 adjustment codes and their descriptions: CB - Chargeback - Full, PC - Chargeback - Partial, DB - Debit, EM - Earmark Attribution, AB - JFC Attribution, MF - Merchant Credit - Full, MP - Merchant Credit - Partial, PT - Partnership Attribution, RA - Reattribution - Presumptive, RD - Redesignation - Full, ST - Redesignation - Partial, FR - Refund - Full, PR - Refund - Partial, SF - Split - Full, SP - Split - Partial, TR - Transfer, and XF - Z Authorized Committee Transfer.

- **Chargeback - Full:** Intended to be used for credit card contribution chargebacks. This adjustment only requires an adjustment date. When used within the same reporting period as the original contribution's date, the donation will not pull in your FEC report's Schedule A receipts. When the adjustment is applied after the original gift's period, the adjustment shows a negative amount on the FEC report.
- **Chargeback - Partial:** Intended to be used for partial credit card contribution chargebacks. This adjustment requires an adjustment date and amount. Refer to **Chargeback - Full** for information regarding this type of adjustment on FEC reports.
- **Debit:** Intended to be used when a check bounces. The adjustment date should be the day the bank deducts these funds from your account. When used within the same reporting period as the original contribution's date, the donation will not pull in your FEC Report Schedule A

receipts. When the adjustment is applied after the original gift's period, the adjustment shows a negative amount on the FEC report.

- **Earmark Attribution:** Intended to be used to attribute individual earmarked payments to a lump sum contribution from a conduit.
- **JFC Attribution:** Used when recording a contribution from a Joint Fundraising Committee (JFC). You will need to enter both the JFC check as well as the attribution info.
- **Merchant Credit – Full:** Intended to be used for credit card contribution online refunds. Specifically, when refunds are issued online via the merchant account's online portal. This adjustment only requires an adjustment date. When used within the same reporting period as the original contribution's date, the donation will not pull in your FEC report's Schedule A receipts. When the adjustment is applied after the original gift's period, the adjustment shows a negative amount on the FEC report.
- **Merchant Credit – Partial:** Intended to be used for partial credit card contribution online refunds. Specifically, when refunds are issued online via the merchant account's online portal. This adjustment requires an adjustment date and amount. Refer to **Merchant Credit - Full** for information regarding this type of adjustment on FEC reports.
- **Partnership Attribution:** Used when assigning credit to partners for a partnership or LLC gift. This adjustment requires an adjustment date, amount and existing donor. These will show as memo entries on Schedule A. If you receive partnership information after the original gift was reported, this will pull the original gift (regardless of date) and the partnership information all as memo items.
- **Reattribution - Presumptive:** A reattribution reallocates money from an original donor to a second donor, usually the donor's spouse. An adjustment date, adjustment amount, and existing donor are required for this type of adjustment.
 - **A presumptive reattribution to another donor:**

Applied when there are two names on a check with one signature (ex. John Smith and Anna Smith on check header, but only John Smith signed the check).

A presumptive reattribution of excess funds can be applied to the second name on the check as long as the appropriate letter is sent to the donors informing them of the reallocation.
- **Redesignation - Full:** A redesignation reallocates a contributor's donation between campaign cycles, usually between primary and general cycles. When reallocating a contributor's full donation, apply the "Redesignation - Full" adjustment. Adjustment date and cycle fund code (P2014, G2014, etc.) are required.
- **Redesignation - Partial:** A redesignation reallocates a contributor's donation between campaign cycles, usually between primary and general cycles. When reallocating a part of a contributor's

donation, apply the “Redesignation - Partial” adjustment. Adjustment date, adjustment amount, and cycle fund code (P2018, G2018, etc.) are required.

- **Refund - Full:** When a contribution is refunded in full to the donor usually via a refund check. This adjustment only requires an adjustment date. The refund will only adjust the aggregate amounts in your receipts. You are responsible for creating expenditures for refunds to report on Schedule B of your FEC Report.
- **Refund - Partial:** When a donor is refunded only a part of their contribution usually via a refund check. This adjustment requires an adjustment date and amount. Refer to **Refund – Full** for information regarding this type of adjustment on FEC reports.
- **Split – Full:** This is used when you have both contributors’ signatures or have received a follow-up letter confirming the second donor. This moves the entire contribution from one person to another.
- **Split - Partial:** This is used when you have both contributors’ signatures or have received a follow-up letter confirming the second donor. This is if you only want to move part of a donation from one person to another.
- **Transfer:** When a contribution needs to simply be transferred from one donor to another. Usually used when a contribution was mistakenly assigned to the wrong donor. An adjustment date (normally the same date as the original batch date) and existing donor is required. This type of adjustment does not show any info on FEC reports.
- **Void a Refund:** Used to void a refund adjustment that was previously made to a contribution.