Course-Based Fee Request Form
Instructions

OCTOBER 2023
# Course-Based Fee Request Form

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## Terminology

- **Course Lecture**: Supports the purchase of materials and supplies used by individual students to meet the learning outcomes of a specific course during a specific academic period.
- **Course Lab**: Supports the cost of laboratory materials and supplies used in a course within a specific academic space.
- **Lab Access**: Supports the purchase, repair, or replacement of computer hardware within a specific school/college.
- **Software**: Supports the purchase of specialized software licensing for student use within a specific school/college.
- **Tools**: Supports the purchase, repair, or replacement of specialized tooling within a specific school/college.

## Contacts

**For assistance, please contact the Assistant to the Dean/Finance Manager:**

- College of Health and Public Service: [Jennyfer Gaede](mailto:Jennyfer.Gaede@uvu.edu)
- College of Humanities and Social Sciences: [Jolene Arnoff](mailto:Jolene.Arnoff@uvu.edu)
- College of Science: [Kerri Howlett](mailto:Kerri.Howlett@uvu.edu)
- School of the Arts: [Karen Watson](mailto:Karen.Watson@uvu.edu)
- School of Education: [Wendy Oldroyd](mailto:Wendy.Oldroyd@uvu.edu)
- Smith College of Engineering and Technology: [Todd Palmer](mailto:Todd.Palmer@uvu.edu)
- Woodbury School of Business: [Susan Dunn](mailto:Susan.Dunn@uvu.edu)
Introduction

The Utah Board of Higher Education has delegated to UVU’s Board of Trustees the responsibility to review, approve, adjust, and repeal course-based fees. UVU Policy 607, Course-Based Fees for Credit Courses, establishes the process for creating, reviewing, revising, and repealing course-based fees for credit courses and the appropriate use of course-based fee revenues.

Course-based fees may be assessed to cover costs when no other dedicated funds are available for the allowable expenses, and shall cover only the specific, direct costs essential to the educational outcomes for specific courses. Please see the current Guidelines for Course-Based Fees for more information.

All course-based fee requests must be submitted and approved by your college/school dean by December 1st to be included in the annual Course Fee Review Committee meeting held in January. Late requests will not be included in the annual meeting.

To be considered by the Course Fee Review Committee, the electronic form will require the following:

- Index code (see Finance & Business Services)
- Detail code (see Bursar’s Office)
- List of specific and allowable expenses to be paid from fee revenue
- Amount requested (whole dollars only)
- Supporting documentation (quote, invoice, contract, purchase order, etc.)
- Detailed rationale

If approved, course-based fee requests will first be applied to fall semester course sections of the following academic year.

⚠️ Warning!
Course-based fees cannot be added or modified during the curriculum process in CourseLeaf CIM.
It is important to note that **Index** codes have a **1:1** relationship with **Detail** codes, and **Detail** codes can have a **1:many** relationship with **Attribute** codes. However, once an **Attribute** code is assigned to a **Detail** code, it cannot be assigned to a different **Detail** code.

<table>
<thead>
<tr>
<th>Fee Type is…</th>
<th>Detail Code begins…</th>
<th>Attribute Code begins…</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course Lecture</td>
<td>C</td>
<td>X</td>
</tr>
<tr>
<td>Course Lab</td>
<td>C</td>
<td>X</td>
</tr>
<tr>
<td>Lab Access</td>
<td>L</td>
<td>Z</td>
</tr>
<tr>
<td>Software</td>
<td>L</td>
<td>Z</td>
</tr>
<tr>
<td>Tool</td>
<td>L</td>
<td>Z</td>
</tr>
</tbody>
</table>

**Did You Know…?**

- All course-based fee attribute codes that begin with “Z” (Lab Access, Software, and Tool) are **charged once per semester**, regardless of how many sections a student registers for that include the **same** attribute code (e.g., Z045).
- If a student repeats a course, they pay the fee again.
- **Fees are specific to college, department, and course.** If a student registers for a digital art class (e.g., Z120) and a web design class (e.g., Z088) where each course includes a Lab Access fee, the student will pay TWO fees.
- Labs are not equipped the same across campus; some are very specialized. The individual course-based fees fund the associated college’s purchase and maintenance of lab equipment.
1. To be considered by the Course Fee Review Committee, the following information is required:

- Index code (see Finance & Business Services)
- Detail code (see Bursar's Office)
- Amount requested (whole dollars only)
- List of specific and allowable expenses to be paid from fee revenue
- Supporting documentation (quote, invoice, contract, purchase order, etc.)
- Detailed rationale

When you're prepared to begin, navigate to the Course-Based Fee Request Form, [https://qualtrics.uvu.edu/employee/SV_3gHo2Sp1muRYQDA](https://qualtrics.uvu.edu/employee/SV_3gHo2Sp1muRYQDA), Enter the Banner Subject Code and Course Number (full or partial) and select it from the drop-down list. For example:

Select the desired course from the list and click “GO!”
2. The selected course information, including catalog description and any existing course-based fees, will be displayed:

Course Information for **MGMT-3450**

**Title:** Operations Management

**Department:** Strat Managmt and Operations  
**College:** Woodbury School of Business  
**Credit Hours:** 3  
**Lecture Hours:** 3

**Description:** Prerequisite(s): Matriculation into WSB and University Advanced Standing  
Focuses on the management of resources for products, production, or services within an organization. Covers project management, supply chain, facility location and layout, forecasting, scheduling, planning, and operational processes. Emphasizes product/service development, supply chain, forecasting, inventory control, quality assurance, and research techniques. May be delivered hybrid and/or online.

Canvas Course Mats $85/McGraw applies  
Lab access fee of $25 for computers applies.

<table>
<thead>
<tr>
<th>Attribute Code</th>
<th>Description</th>
<th>Index Code</th>
<th>Index Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Z109</td>
<td>Lab access fee of $25 applies</td>
<td>F50322</td>
<td>Bus 0050 Lab Acces</td>
</tr>
</tbody>
</table>

Is this the correct course?

- ✔ Yes. Let's Go!
- ☹ No. Let's Start Over.

Click **Yes** to confirm the course selection.

Click **No** to return to step 1 for a new course selection *(please allow for a short redirect).*

Click **NEXT** to continue.
3. Select a course of action from the list of options and refer to the associated steps:

- Add New Course-Based Fee: **Steps 4 – 13**
- Change Existing Course-Based Fee: **Steps 14 – 16**
- Delete Existing Course-Based Fee: **Steps 17 – 18**
- Modify Index and/or Detail Code Only: **Steps 19 – 20**

Return to step 1 for a new course selection (please allow for a short redirect).

Click 'NEXT' to continue.

*For more information, including how to approve a request in the workflow, skip to steps 21 - 25 below.*
4. Confirm you are prepared with an active Index and Detail code:

Do you have an Index code AND a Detail code for this fee?

⚠️ Note: Index Codes are assigned by the Finance & Business Services Office and Detail codes are assigned by the Bursars Office. Both codes must be created prior to submitting a fee request form.

Click “Yes” to confirm you have active Index and Detail codes.

Click “No” to be redirected to Finance and Business Services page (https://www.uvu.edu/finance/).

Click “NEXT” to continue.

5. When “Add” is selected in step 3 above, a message about course-based fees will be displayed:

Course-based fees may cover materials that cannot be purchased by individual students or bulk purchases that reduce the cost to students. Such direct costs include course materials, chemicals, tooling, uniforms, laundry, testing, off-site instructional activities, supplies used in instructions, instructional equipment, student licensure and certifications, maintenance of laboratory equipment, computer software, subscriptions, or transportation in which the entire class participates.

Review the available fee types and select the appropriate option:

Course Lecture
Supports the purchase of materials and supplies used by individual students to meet the learning outcomes of a specific course during a specific academic period.

Course Lab
Supports the cost of laboratory materials and supplies used in a course within a specific academic space.

(continued next page)
6. Next, enter the Index and Detail codes created for your department and the fee type selected. For example:

<table>
<thead>
<tr>
<th>Index Code</th>
<th>C077</th>
</tr>
</thead>
<tbody>
<tr>
<td>Detail Code</td>
<td>F50131</td>
</tr>
</tbody>
</table>

Click “NEXT" to continue.

7. **Expense Information**
   This section will collect details about the expense(s) being covered by the requested fee (limited to 100 alpha-numeric characters each).

   **Brief Description**
   Provide a brief description of the expense.
   e.g., Art supplies, biological specimens, chemicals, film, gloves, protective clothing, etc.

   Enter:

   **Supplier Name**
   Enter the name of the supplier.

   Enter the primary supplier’s name. If multiple suppliers are included in this expense, separate each name with a comma.
8. Enter the unit size of the primary item, followed by the price per unit (whole numbers only).

**Unit Size**

Provide a description of how a single unit of the expense is distributed.
*e.g., Each, Package, Dozen, etc.*

**Price Per Unit**

Enter the cost of each unit.
*Enter whole numbers only and do not include 'S'.*

9. The student distribution ratio and subsequent questions will be used to calculate the price per student in the request summary:

- **1 unit per student**
- **1 unit per group of students**

If you select “1 unit per student”, you will also be prompted with:

**Will the items purchased become the property of the student, or remain at UVU?**

- Property of Student
- Property of UVU
If you select “1 unit per group of students”, you will be prompted with:

<table>
<thead>
<tr>
<th>What is the expected number of students in each group that will use the item? Enter your best estimate.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>How often will this item be replaced?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Once per semester / term</td>
</tr>
<tr>
<td>Once per academic year</td>
</tr>
<tr>
<td>As needed</td>
</tr>
<tr>
<td>Other</td>
</tr>
</tbody>
</table>

Click “NEXT” to continue.

10. Next, attach the supporting documentation for the total request (PDF and Excel files only).

Upload documentation to support your request here (PDF and Excel files only)

Drop files or click here to upload

Do you have another file to upload?

| No |
| Yes |

Once the file(s) have been fully uploaded, click “NEXT” to continue.
11. The following prompts (Department Chair, Financial Manager, Dean) are required to build the approval workflow.

Enter the first few letters of an approver’s name, then select the correct option from the drop-down list. For example:

**Search for and select the name of your Department Chair.**

- Cheryl
- Cheryl Hanevicz - CHPS College Health/Public Service
- Cheryl Levi - Information Systems and Technology
- Cheryl St. Pierre - Academic Programs and Assessment
- Cheryl Johnson - Nursing/Health Professions
- Cheryl Williams - Psychology

**Search for and select the name of the Financial Manager for your college / school.**

Search by UVID or Name...

**Search for and select the name your Dean of the College or School.**

Search by UVID or Name...

Note: If your dean has delegated this responsibility, enter the Associate Dean’s name here.

Click “NEXT” after each name selection to continue.
12. A summary of your request is then displayed. For example:

![Request Summary Image]

Note the “Price Per Student” amount has been calculated from the information provided in previous steps. All amounts will be rounded down to the whole dollar, if approved by the Course Fee Review Committee.

Did You Know…?

Based on the type of request being submitted, additional details will be visible on the Request Summary screen. For example:

![Request Details Image]
The approval workflow is also displayed:

**Approval Workflow**

1. **Department Chair:** Cheryl St. Pierre
2. **Financial Manager:** Jan Christensen
3. **Dean:** Filson Vaught
4. **Course Fee Review Committee Chair:** Laurie Sharp
5. **Academic Scheduling Manager:** Lisa Price

After **carefully** reviewing the summary details:

**Is this information correct?**

- Yes. Let's Submit!
- No. Let's Start Over.

Click **“Yes”** to confirm the course selection.

Click **“No”** to return to step 1 for a new course selection *(please allow for a short redirect)*.

13. When you’re ready to submit the request and begin the approval workflow process, click **“Submit”** at the bottom of the screen.

A confirmation screen is then displayed, including a [link](#) to the JIRA ticketing software where you can follow the progress of your request at any time:

**Submitted**

Thank you for completing this form. [You can follow the progress of this request in Jira](#).

**Approval Workflow**

1. **Department Chair:** Lisa Price
2. **Financial Manager:** Jan Christensen
3. **Dean:** Filson Vaught
4. **Committee Chair:** Laurie Sharp
5. **Academic Scheduling Manager:** Lisa Price

For more information, including how to approve a request in the workflow, *skip to steps 21 - 25 below.*
14. When “Change” is selected in step 3 above, a list of existing fees for the course will be displayed. For example:

Select the existing Course-Based Fee that you would like to change.

- Course fee of $20 applies
- Software fee of $15 applies
- Lab access fee of $45 applies

Select the relevant fee to continue.

15. Indicate how the fee should change:

What needs to change with the course-based fee?

- The fee is increasing
- The fee is decreasing

16. Next, you have the option to change the current Index and/or Detail codes for this fee.

Are you also modifying the Index code and/or the Detail code with this change?

- Yes
- No

By selecting “Yes”, an additional prompt appears:
Selecting Index Code and/or Detail Code will allow you to enter the new codes:

What is the new Index Code?

What is the new Detail Code?

Once the code(s) have been entered, click “NEXT” to continue. Refer to steps 7 – 13 above to complete this request.
17. When “Delete” is selected in step 3 above, a list of existing fees for the course will be displayed. For example:

Select the existing Course-Based Fee that you would like to delete.

<table>
<thead>
<tr>
<th>Course fee of $20 applies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Software fee of $15 applies</td>
</tr>
<tr>
<td>Lab access fee of $45 applies</td>
</tr>
</tbody>
</table>

Select the relevant fee to continue.

18. Provide a brief justification for why this action is being requested (limited to 100 alphanumeric characters). For example:

Provide a brief summary of this requested action.

Software is no longer being used to teach this course

Characters remaining: 46

After providing a justification, click “NEXT” to continue. Refer to steps 11 – 13 above to complete this request.
Modify Index and/or Detail Code Only  
(*steps 19 – 20*)

19. When “Modify” is selected in step 3 above, a list of existing fees for the course will be displayed. For example:

Select the existing Course-Based Fee that you would like to modify its Index and/or Detail Code.

- Course fee of $20 applies
- Software fee of $15 applies
- Lab access fee of $45 applies

Select the relevant fee to continue.

Select the code(s) to modify

- Index Code
- Detail Code
- No code changes are needed.
Selecting Index Code and/or Detail Code will allow you to enter the new codes:

What is the new Index Code?

What is the new Detail Code?

20. Provide a brief justification for why this action is being requested (limited to 100 alphanumeric characters). For example:

Provide a brief summary of this requested action.

A new department was created and existing subjects/courses have been divided.

Characters remaining: 23

Once the code(s) have been entered, click “NEXT” to continue. Refer to steps 7 – 13 above to complete this request.
Review the Status of a Request
(steps 21 – 25)

21. The confirmation screen includes a link to the JIRA ticketing software where you can follow the progress of your request at any time:

- **Submitted**
  - Thank you for completing this form. You can follow the progress of this request in Jira
  - Approval Workflow:
    - Department Chair: Lisa Price
    - Financial Manager: Jan Christensen
    - Dean: Filson Vaught
    - Committee Chair: Laurie Sharp
    - Academic Scheduling Manager: Lisa Price

22. Click the link to locate the ticket (aka Reference) number that was assigned to your request. The UVU Service Center (JIRA) Requests screen will open in a new browser tab. For example:

The “Summary” column includes Add New along with the subject and course selected in step 1 above.

The “Status” column indicates the workflow stage your request is currently in.
23. If you’re an approver (department chair, financial manager, or dean), you will receive an email from “Automation for Jira” that includes a Jira Reference number in the subject line. The body of the email indicates approval is needed and includes a direct link to the Jira ticket. For example:

![Photo of email example](image)

Click “View request” to continue.

24. Once the request is open in Jira, you can check the current status, review all details of the request, follow the workflow activity, and approve/decline. The following example is in the first approver’s queue:
25. As an approver, click “Show details” to see the current fee amount (if applicable) and the new fee amount, all information provided by the requestor – including any supporting documentation:

Once you have reviewed this information, return to the top-right corner of the screen, and click “Approve” or “Decline”.

The “Status” will change to reflect your selection, and the approver name and decision will be noted.