UVU
ACADEMIC SCHEDULING OFFICE

Course-Based Fee Request Form Instructions

NOVEMBER 2023
v1.3

Course-Based Fee Request Form

Navigation	• **Course-Based Fee Request Form** (**Qualtrics**), *https://qualtrics.uvu.edu/employee/SV_3qHa2Sp1muRYQDA* • **Service Center Portal** (**Jira**), *https://uvu-it.atlassian.net/servicedesk/customer/portals*
Resources	• **Academic Scheduling Office**, *https://www.uvu.edu/academicscheduling/index.html* • **Bursar's Office**, *https://www.uvu.edu/cashier/* • **Calculation Workbook**, *https://www.uvu.edu/academicscheduling/docs/course_fees/course-based_fee_calculation_workbook_nov2023.xlsx* • **Course Fee Review Committee**, *https://www.uvu.edu/academicaffairs/academic-programs/course-fee-committee.html* • **Finance & Business Services**, *https://my.uvu.edu/finance/* • **Guidelines for Establishing Course-Based Fees**, *https://www.uvu.edu/academicscheduling/docs/course_fees/guidelines_course-based_fees_sep2023.pdf* • **USHE Policy R517** – Course & Program Fees, *https://public.powerdms.com/Uta7295/documents/2022243* • **UVU Policy 607** – Course-Based Fees for Credit Courses, *https://www.uvu.edu/policies/manual/index.html*
Terminology	• **Administrative Sunset:** A statute that includes provision for automatic termination of a course-based fee at the end of a specified time period as determined by the Course Fee Review Committee and approved by the Board of Trustees. • **Calculation Workbook:** A budget template to aid the process of creating, reviewing, revising, and repealing course-based fee amounts. This document may be used to justify specific expenses associated with a request. • **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_ • College of Humanities and Social Sciences: _Jolene Arnoff_ • College of Science: _Kerri Howlett_ • School of the Arts: _Karen Watson_ • School of Education: _Wendy Oldroyd_ • Smith College of Engineering and Technology: _Todd Palmer_ • Woodbury School of Business: _Susan Dunn_
Contents	

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.
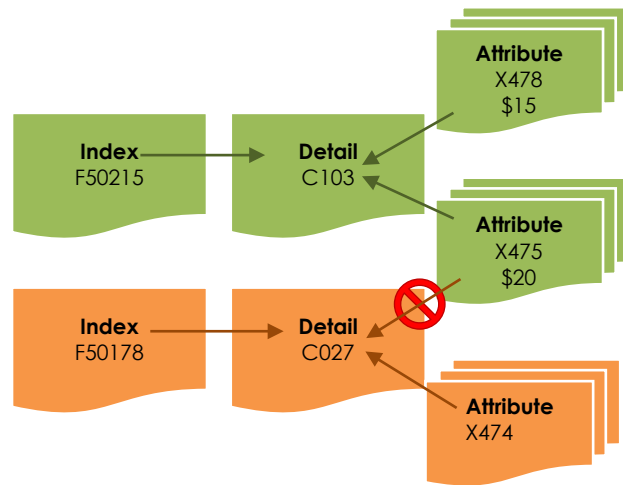

⚠️ **Warning!**
Course-based fees **cannot** be added or modified during the curriculum process in CourseLeaf CIM.

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 <u>cannot</u> be assigned to a different Detail code.

Fee Type is…	Detail Code *begins…*	Attribute Code *begins…*
Course Lecture	**C**	**X**
Course Lab	**C**	**X**
Lab Access	**L**	**Z**
Software	**L**	**Z**
Tool	**L**	**Z**

Index F50215 → **Detail** C103 → **Attribute** X478 $15

Attribute X475 $20

Index F50178 → **Detail** C027

Attribute X474

❓ **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 <u>**same**</u> attribute code (e.g., Z045).

- If a student repeats a course, they will 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.

⚠ **Caution!**

The current Course-Based Fee Request form is **version 1.0** which utilizes features from three separate programs (Qualtrics, Banner, and Jira). As with any new process, there are bound to be a few bumps, so your feedback is important to making improvements for future cycles. Please email any issues or suggestions to lprice@uvu.edu. Thank you!

Course Selection

> ### ❓ Did You Know…?
>
> Before you begin the submission process, you are encouraged to use the **Calculation Workbook** tool to accurately calculate the total cost per student. The completed document can be used to justify specific expenses associated with a request (when attached to the submission).

1. To be considered by the Course Fee Review Committee, the following information is required on the submission form:

   - 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, and/or course-based fee calculation workbook)
   - Detailed rationale

   When you're prepared to begin, navigate to the Course-Based Fee Request Form, *https://qualtrics.uvu.edu/employee/SV_3gHa2Sp1muRYQDA*. 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!"

MGMT-3450 - Operations Management

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 Managmnt 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.

Attribute Code	Description	Index Code	Index Title
Z109	Lab access fee of $25 applies	F50322	Bus 0050 Lab Acces

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)*.

NEXT   Click "**NEXT**" to continue.

⚠ **Caution!**
All required prompts must be completed before you can continue to the next screen. Watch for highlighted questions and messages. For example:

Please enter a valid number.

Price Per Unit

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

Please answer this question.

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

Property of Student

Property of UVU

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

Option	Steps
Add New Course-Based Fee	*Steps 4 – 13*
Change Existing Course-Based Fee	*Steps 14 – 17*
Delete Existing Course-Based Fee	*Steps 18 – 19*
Modify Index and/or Detail Code Only	*Steps 20 – 23*
Return to course selection	Return to step 1 for a new course selection *(please allow for a short redirect).*

A future version of the form will include an "Administrative Sunset" option.

NEXT   Click 'NEXT" to continue.

---

*For more information, including how to **APPROVE or DECLINE** a request in the Jira workflow, skip to steps 24 - 29 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 Bursar's Office. Both codes must be created *prior* to submitting a fee request form.

Yes   Click "**Yes**" to confirm you have active Index and Detail codes.

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

NEXT   Click "**NEXT**" to continue. ---- *A future version of the form will include a "BACK" button for improved navigation.*

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)

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.

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

| Index Code | C077 |
| Detail Code | F50131 |

NEXT   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.

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). Where multiple expenses exist within a single fee (i.e., canvas, paints, brushes, etc.), please itemize each in a spreadsheet and upload in step 10 below.

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 '$'.

[   ]

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 these questions:

What is the expected number of students in each group that will use the item? Enter your best estimate.

How often will this item be replaced?

Once per semester / term

Once per academic year

As needed

Other

NEXT   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

NEXT   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 Hanewicz - 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.

NEXT   Click "**NEXT**" after each name selection to continue.

12. A summary of your request is then displayed. For example:

Request Summary

Requestor: Lisa Price
Course: MGMT-3450 – Operations Management
Department: Strat Managmnt and Operations
College: Woodbury School of Business

Request: Add New Course-Based Fee

New Index Code: C077
New Detail Code: F50131
Dollar Amount: $
Expense Description: Materials necessary for individual students to meet the learning outcomes of the course.
Supplier Name: Franklin Covey
Unit Size: DZ
Price Per Unit: $99
Replacement Schedule:
Price Per Student: $8.25
Property of Item After Use: Property of UVU

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: Change an Existing Course-Based Fee - Decrease

Existing Course-Based Fee: $45
Requested New Course-Based Fee: $1

Existing Index Code: F50320
Existing Detail Code: L004

NEW Index Code: F12345
NEW Detail Code: C123

Request: Delete an Existing Course-Based Fee

Existing Course-Based Fee: $15
Existing Index Code: F50337
Existing Detail Code: L015

Reason: Software is no longer being used to teach this course.

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 <u>carefully</u> 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.

SUBMIT

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 or DECLINE a request in the Jira workflow, skip to steps 24 - 29 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 will 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. Indicate which codes should be updated:

Select the code(s) to modify

Index Code

Detail Code

No **code** changes are needed.

...and enter the appropriate information:

What is the new Index Code?

What is the new Detail Code?

17. This question allows a department to submit <u>identical</u> changes to multiple courses of the <u>same</u> prefix/subject code at the same time:

Will an identical change apply to multiple course numbers of the same Subject code?
(Index and Detail codes, plus $ Amount must match!)

Yes

No

Yes

Click "**Yes**" if multiple course numbers apply to this submission.

No

Click "**No**" if this is a single submission.

A future version of the form will include a "BACK" button for improved navigation.

NEXT

If "No" is selected, click "**NEXT**" to continue.
Refer to **steps 7 – 13** above to complete this request.

If "**Yes**" is selected, a text box will open where you can list additional course numbers:

List the identical changes.

As an example, several colleges utilize the same Lab Access fee across all of their courses, and each course uses the **same** Index, Detail, and Attribute code. If this is the case and the **same** approval workflow applies:

*…your list **can** include course numbers of the **same** subject:*	**MGMT** 2240 **MGMT** 2340 **MGMT** 3070 **MGMT** 3345	*…but **cannot** Include course numbers of a **different** subject:*	**HM** 3640 **LEGL** 3130 **MARK** 2390 **ENTR** 4300

Please verify your list against the Course-Based Fee Report before continuing with a request.
See: https://www.uvu.edu/academicscheduling/fee_reports.html.

NEXT

Once the information has been entered, click "**NEXT**" to continue.
Refer to **steps 7 – 13** above to complete this request.

Delete Existing Course-Based Fee
(steps 18 – 19)

18. 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**.

Course fee of $20 applies

Software fee of $15 applies

Lab access fee of $45 applies

Select the relevant fee to continue.

19. Provide a brief justification for why this action is being requested (limited to 100 alpha-numeric characters). For example:

Provide a brief summary of this requested action.

Software is no longer being used to teach this course.

Characters remaining: 46

NEXT   After providing a justification, click "**NEXT**" to continue.
Refer to **steps 11 – 13** above to complete this request.

20. 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.

21. Next, indicate which code(s) should be updated:

Select the code(s) to modify

Index Code

Detail Code

No **code** changes are needed.

…and enter the appropriate information:

What is the new Index Code?

What is the new Detail Code?

22. Provide a brief justification for why this action is being requested (limited to 100 alpha-numeric 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

23. This question allows a department to submit <u>identical</u> changes to multiple courses of the <u>same</u> prefix/subject code at the same time:

Will an identical change apply to multiple course numbers of the same Subject code?
(Index and Detail codes, plus $ Amount must match!)

Yes

No

Yes

Click "**Yes**" if multiple course numbers apply to this submission.

No

Click "**No**" if this is a single submission.

A future version of the form will include a "BACK" button for improved navigation.

NEXT

If "No" is selected, click "**NEXT**" to continue.
Refer to **steps 11 – 13** above to complete this request.

If "**Yes**" is selected, a text box will open where you can list additional course numbers:

List the identical changes.

As an example, several colleges utilize the same Lab Access fee across all of their courses, and each course uses the **same** Index, Detail, <u>and</u> Attribute code. If this is the case <u>and</u> the **same** approval workflow applies:

...your list **can** include course numbers of the **same** subject:		...but **cannot** Include course numbers of a **different** subject:	
	MGMT 2240		**HM** 3640
	MGMT 2340		**LEGL** 3130
	MGMT 3070		**MARK** 2390
	MGMT 3345		**ENTR** 4300

Please verify your list against the Course-Based Fee Report <u>before</u> continuing with a request. See: https://www.uvu.edu/academicscheduling/fee_reports.html.

NEXT   Once the information has been entered, click "**NEXT**" to continue.
Refer to **steps 11 – 13** above to complete this request.

Review & Approve (or Decline) a Request
(steps 24 – 29)

⚠️ **Warning!**

To begin the approval process, you **must have an active Jira account**.
If you've never submitted a request to the Service (Help) Desk <u>online</u>, and/or when clicking "View request" from an email you see this message:

> We couldn't find any requests

…your Jira account is likely <u>not</u> active. Contact the Service (Help) Desk to request access (<u>https://www.uvu.edu/servicedesk/</u>).

24. The confirmation screen includes a **link** to the JIRA ticketing software where the requestor can follow the progress of a request at any time:
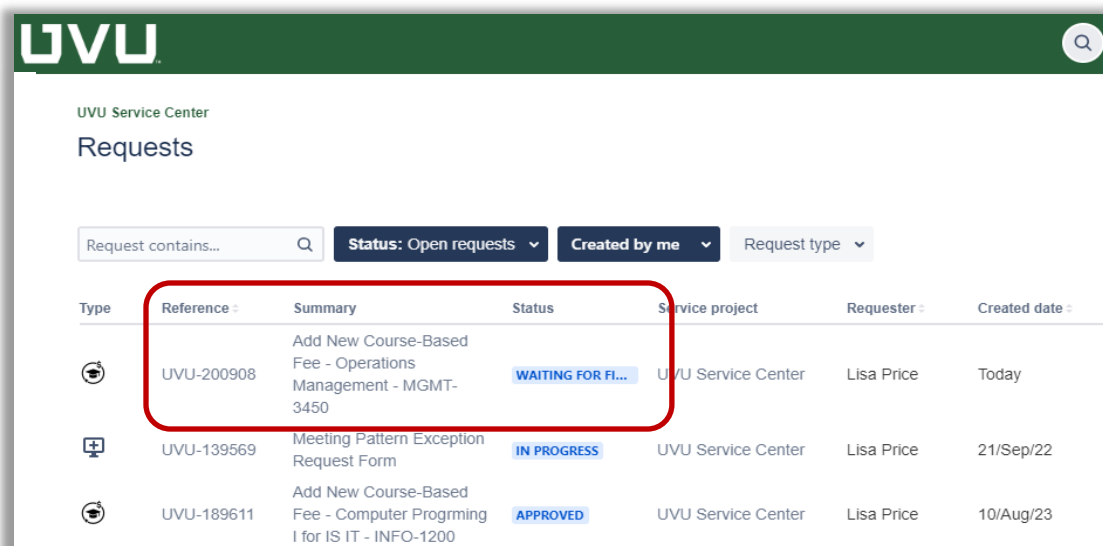
☑ **Submitted**

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

25. 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:

UVU Service Center
Requests

| Request contains... 🔍 | Status: Open requests ∨ | Created by me ∨ | Request type ∨ |

| Type	Reference	Summary	Status	Service project	Requester	Created date
⊛	UVU-200908	Add New Course-Based Fee - Operations Management - MGMT-3450	WAITING FOR FI...	UVU Service Center	Lisa Price	Today
⊞	UVU-139569	Meeting Pattern Exception Request Form	IN PROGRESS	UVU Service Center	Lisa Price	21/Sep/22
⊛	UVU-189611	Add New Course-Based Fee - Computer Progrming I for IS IT - INFO-1200	APPROVED	UVU Service Center	Lisa Price	10/Aug/23

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.

26. 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.
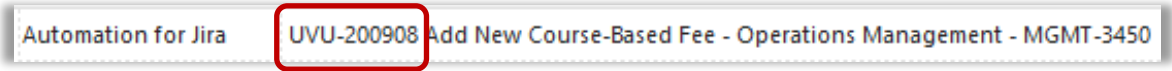
The body of the email indicates approval is needed and includes a direct link to the Jira ticket. For example:
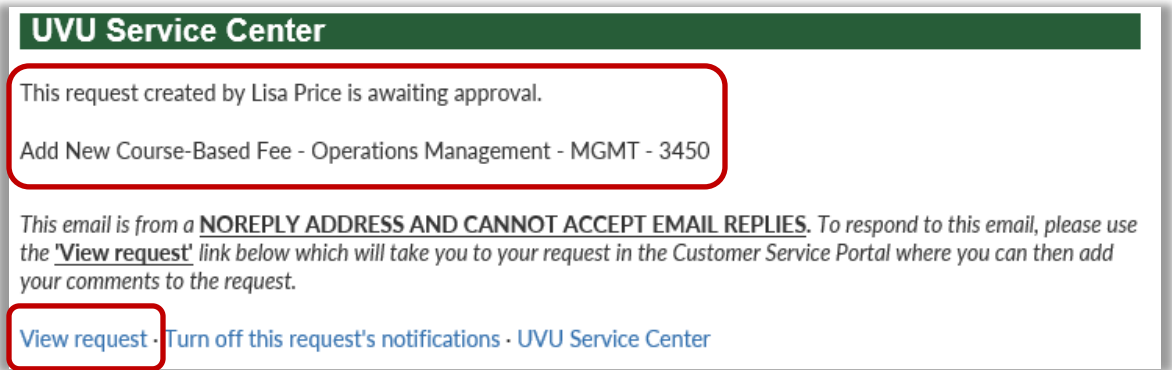
Click "View request" to continue.

27. 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 reflects the first approver's queue:

28. As an approver, click "**Show details**" to review the current fee amount (if applicable), **new fee amount**, and other information provided by the requestor.

Before approving (or declining), open the **supporting documentation** link and review for accuracy.

Be aware that a requestor may have supplied a list of courses that use the same Index, Detail, <u>and</u> Attribute code that are included with this submission.

29. Once you have reviewed all details, return to the top-right corner of the screen, and click "Approve" or "Decline".

The ticket "Status" will change to reflect your selection and includes the approver name and date/time.
For example:

When finished, you can close the browser tab.