

## Guidelines for Establishing Course-Based Fees

### *Degree Level for Course-Based Fees*

Course-based fees are limited to undergraduate courses. For graduate courses, differential tuition covers allowable costs of a particular course not covered by tuition. Differential tuition is evaluated each year in the tuition setting process, so that adjustments may be made where needed.

### *Minimum Threshold for Course-Based Fees*

Although UVU's policy does not state a specific dollar threshold, there is an institutional guideline regarding course-based fees that are less than \$10. The amount of revenue generated by small course-based fees is minimal, which presents time considerations when it comes to going through the course fee review process, as well as monitoring and maintaining an associated course fee index for approved course-based fees that are less than \$10.

### *Special Circumstances Related to Course-Based Fees*

UVU offers academic programs funded with non-appropriated funding in indexes that start with a letter (also referred to as soft funds or off-budget funds), such as in allied health and aviation. Courses offered in non-appropriated academic programs cannot charge course-based fees.

### *Definitions for Course-Based Fee Types*

Fee Type	Definition
Course Lab	<ul style="list-style-type: none"> <li>▪ Supports the cost of laboratory materials and supplies used in a course within a specific academic space.</li> <li>▪ Supplies are used in courses with instructional method designation of LAB.</li> <li>▪ Supplies are used in courses with instructional method designation of LEL and primarily used in the laboratory setting.</li> </ul>
Course Lecture	<ul style="list-style-type: none"> <li>▪ Supports the cost of materials and activities used to enhance the educational experience.</li> <li>▪ Supplies are used in courses with instructional method designation of LEC.</li> <li>▪ Supplies are used in courses with instructional method designation of LEL and primarily used in the traditional classroom setting.</li> </ul>
Lab Access	<ul style="list-style-type: none"> <li>▪ Supports the purchase, repair, or replacement of computer hardware within a specific school/college.</li> </ul>
Software	<ul style="list-style-type: none"> <li>▪ Supports the purchase of student use software, upgrades, and licensing.</li> </ul>
Tools	<ul style="list-style-type: none"> <li>▪ Supports the purchase, repair, or replacement of specialized tools within a specific department/program (e.g., auto mechanics).</li> </ul>

### *Categories for Teaching and Learning & Required Funding Sources*

Category	Category Description & Examples	Required Funding Source (in rank order)
Academic Space	<ul style="list-style-type: none"> <li>▪ University facilities whose primary purpose is the support of academic activities related to teaching and learning.</li> <li>▪ Examples: Classrooms, laboratories, simulators</li> </ul>	<ol style="list-style-type: none"> <li>1. R&amp;R</li> <li>2. Grants</li> <li>3. Donations</li> <li>4. University Funds</li> <li>5. Dean Contingency Funds</li> <li>6. Capital Development Funds Appropriated by the Legislature</li> </ol>
Capital Assets (Equipment)	<ul style="list-style-type: none"> <li>▪ All equipment with an acquired value of <u>over \$5,000</u> and is tagged with a UVU inventory sticker.</li> </ul>	<ol style="list-style-type: none"> <li>1. R&amp;R</li> <li>2. Grants</li> </ol>

Category	Category Description & Examples	Required Funding Source (in rank order)
	<ul style="list-style-type: none"> <li>▪ Examples: Audio visual equipment, data processing equipment (computers), software, instructional equipment</li> </ul>	<ol style="list-style-type: none"> <li>3. Donations</li> <li>4. University Funds</li> <li>5. Course-Based Fees for Course Lab, Course Lecture, Lab Access, or Tools</li> <li>6. Dean Contingency Funds</li> </ol>
<p>Capital Assets (Equipment) Maintenance &amp; Service</p>	<ul style="list-style-type: none"> <li>▪ Contractual or non-contractual maintenance of capital assets intended to prolong its usable life or maintain performance. Includes replacement of accessories and parts.</li> <li>▪ Examples: Annual agreements with third-party service vendors, monthly service arrangements for equipment, such as equipment calibration or preventive maintenance and repair</li> </ul>	<ol style="list-style-type: none"> <li>1. R&amp;R</li> <li>2. Department Funds</li> <li>3. Course-Based Fees for Course Lab, Course Lecture, Lab Access, or Tools</li> <li>4. Dean Contingency Funds</li> </ol>
<p>Class Activities &amp; Field Trips</p>	<ul style="list-style-type: none"> <li>▪ Experiences that take place outside of an academic space and are required within the context of a course.</li> <li>▪ Examples: Entrance fees, field work expenses, travel expenses</li> </ul>	<ol style="list-style-type: none"> <li>1. Grants</li> <li>2. Donations</li> <li>3. Department Funds</li> <li>4. Course-Based Fees for Course Lecture</li> <li>5. Dean Contingency Funds</li> </ol>
<p>Computer Hardware/Parts</p>	<ul style="list-style-type: none"> <li>▪ Computers and computer peripherals whose value is <u>less than \$5,000</u> per unit.</li> <li>▪ Examples: Keyboards, laptops, mice, monitors, printers</li> </ul>	<ol style="list-style-type: none"> <li>1. Grants</li> <li>2. R&amp;R</li> <li>3. Department Funds</li> <li>4. Course-Based Fees for Course Lecture, Course Lab, or Lab Access</li> <li>5. Dean Contingency Funds</li> </ol>
<p>Materials &amp; Supplies</p>	<ul style="list-style-type: none"> <li>▪ Any goods, materials, or teaching tools used by individual students to meet learning outcomes of a specific course during a specific academic period.</li> <li>▪ Examples: Art supplies, biological specimens, chemicals, film, gloves, protective clothing</li> </ul>	<ol style="list-style-type: none"> <li>1. Grants</li> <li>2. Donations</li> <li>3. Department Funds</li> <li>4. Course-Based Fees for Course Lecture or Lab Access</li> </ol>
<p>Non-capital Assets (Equipment)</p>	<ul style="list-style-type: none"> <li>▪ Items costing <u>less than \$5,000 per unit</u>, are not labeled with a UVU inventory sticker, and of which items that are sensitive to conversion to personal use are clearly engraved or stenciled to indicate UVU ownership.</li> <li>▪ Examples: Audiovisual equipment, microscopes, musical instruments, digital cameras, virtual 3D goggles</li> </ul>	<ol style="list-style-type: none"> <li>1. Grants</li> <li>2. Donations</li> <li>3. R&amp;R</li> <li>4. Department Funds</li> <li>5. Course-Based Fees for Course Lab, Course Lecture, Lab Access, or Tools</li> <li>6. Dean Contingency Funds</li> </ol>
<p>Non-capital Assets (Equipment) Maintenance &amp; Service</p>	<ul style="list-style-type: none"> <li>▪ Contractual or non-contractual maintenance of non-capital assets intended to prolong its usable life or maintain performance. Includes replacement of accessories and parts.</li> </ul>	<ol style="list-style-type: none"> <li>1. R&amp;R</li> <li>2. Department Funds</li> <li>3. Course-Based Fees for Course Lab, Course</li> </ol>

Category	Category Description & Examples	Required Funding Source (in rank order)
	<ul style="list-style-type: none"> <li>Examples: Annual agreements with third-party service vendors, monthly service arrangements for equipment, such as equipment calibration or preventive maintenance and repair</li> </ul>	Lecture, Lab Access, or Tools 4. Dean Contingency Funds
Printed Materials, Licensing, or Copyrights	<ul style="list-style-type: none"> <li>Materials for which permission has been obtained or for which a license permits use.</li> <li>Examples: Case studies, lab experiments, play</li> </ul>	1. Grants 2. Donations 3. Department Funds 4. Course-Based Fees for Course Lecture 5. Dean Contingency Funds
Private Instruction	<ul style="list-style-type: none"> <li>Compensation for instructors of individualized private instruction necessary for the development of personal performance skills or artistic competencies of such students</li> <li>Examples: Private music instruction</li> </ul>	1. Grants 2. Donations 3. Course-Based Fees for Course Lab or Course Lecture
Software	<ul style="list-style-type: none"> <li>Computer-related software for individual student use that meets learning outcomes of a specific course whose value is <u>less than \$5,000</u>.</li> <li>Excludes licensing for enterprise-level software (e.g., Adobe).</li> <li>Examples: Annual license maintenance fees, software package/license</li> </ul>	1. Grants 2. Donations 3. Departmental Funds 4. Course-Based Fees for Software 5. Dean Contingency Funds
Special Program/ Clinical Practice	<ul style="list-style-type: none"> <li>Offsets costs for personnel services and related expenses</li> <li>For <u>courses required in an academic program</u>, the best practice is to have a course-based fee for financial aid purposes.</li> <li>Examples: Background investigations, access to software to track immunizations, expenses related to clinical experiences, such as a subject matter experts/preceptors in nursing, dental hygiene, emergency services.</li> </ul>	1. Course-Based Fees for Course Lab or Course Lecture

\*R&R = Renewal and Replacement

### Fee Charge Details

Fee Type	Definition
Course Lab	<ul style="list-style-type: none"> <li>Once per section per semester, regardless of how many sections they're registered for from any college/school.</li> </ul>
Course Lecture	
Lab Access	<ul style="list-style-type: none"> <li>Once per semester, regardless of how many sections they're registered for:               <ul style="list-style-type: none"> <li>from the same college/school, and</li> <li>using the same attribute code.</li> </ul> </li> </ul>
Software	
Tools	

Important Note: If a student repeats a course, they pay the fee again.

To assist with tracking course-based fees that are charged once a semester, Business Intelligence & Research Services (BIRS) developed a dashboard in Tableau that shows the unique number of students in credit courses with associated course-based fees:

<https://tableau.uvu.edu/views/CourseFeesforLabs/CourseBasedforCreditCourses>

Developed September 2023

### ***General Principles in Utah State Board of Higher Education Policy***

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

- 5.1 Course and program fees should cover only the specific costs associated with the particular course or program.
- 5.2 Institutions may not charge course or program fees for costs that are incurred across all programs or courses.
- 5.3 Course and program fees should recover costs when no other dedicated funds are available for that purpose.
- 5.4 Institutions should set course and program fees based on the cost of the activity or service for which the fee is levied.
- 5.5 Institutions may use course and program fees only to support the activity or service for which the fee is being charged.
- 5.6 Institutions shall track and account course and program fees in such a way that the proper use of revenue can be evaluated or audited.
- 5.7 With the exception of equipment replaced on a rotating schedule, course and program fees shall be used each academic period for the benefit of the students who paid the fees.
- 5.8 Course and program fees shall not be used to pay instructional services rendered by faculty, staff, and teaching assistants. Exceptions may include special instructional arrangements such as private music, aviation, clinical, and tutors.
- 5.9 Course and program fees should not be used to pay for materials that can be purchased directly by students through campus stores or other approved institutional entities.

Exceptions to these general principles shall be documented by the institution and reviewed periodically by the institution's course and program fee committee.

This workbook is the budget template for a course fee. Fill out each tab. Totals will calculate automatically and be transferred to the Total Cost Per Student and Course Fee Distribution tabs.

*\* Fill out yellow boxes for your own class \**

Each course will require its own "Course Fee" index. If a new index is needed, fill out a new request.

Class Name
Number of Sections for Class
Average Number of Students / Section
Total Number of Students Affected

**Important Note:**

This calculator document is a resource for the process of creating, reviewing, revising, and repealing course-based fees for credit courses. This calculator document may be used to justify specific expenses associated with a request.

**Document History:**

\* Originally published 2023-11-10













This sheet shows the total costs for a course and calculates a cost per student amount. The colored cells are formulas and will populate automatically.

	Total Cost Per Year	Amount Per Student	Percentages for Course Fee Distribution Tab
Course Lab	\$0.00	#DIV/0!	#DIV/0!
Course Lecture	\$0.00	#DIV/0!	#DIV/0!
Lab Access	\$0.00	#DIV/0!	#DIV/0!
Software	\$0.00	#DIV/0!	#DIV/0!
Tools	\$0.00	#DIV/0!	#DIV/0!
<b>Total Cost Per Year</b>	<b>\$0.00</b>	<b>#DIV/0!</b>	<b>#DIV/0!</b>



# Course-Based Fee Request Form Instructions

**NOVEMBER 2023**  
**v1.3**

# Course-Based Fee Request Form

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<p><b>Resources</b></p>	<ul style="list-style-type: none"> <li>• <b>Academic Scheduling Office</b>, <a href="https://www.uvu.edu/academicscheduling/index.html">https://www.uvu.edu/academicscheduling/index.html</a></li> <li>• <b>Bursar's Office</b>, <a href="https://www.uvu.edu/cashier/">https://www.uvu.edu/cashier/</a></li> <li>• <b>Calculation Workbook</b>, <a href="https://www.uvu.edu/academicscheduling/docs/course_fees/course-based_fee_calculation_workbook_nov2023.xlsx">https://www.uvu.edu/academicscheduling/docs/course_fees/course-based_fee_calculation_workbook_nov2023.xlsx</a></li> <li>• <b>Course Fee Review Committee</b>, <a href="https://www.uvu.edu/academicaffairs/academic-programs/course-fee-committee.html">https://www.uvu.edu/academicaffairs/academic-programs/course-fee-committee.html</a></li> <li>• <b>Finance &amp; Business Services</b>, <a href="https://my.uvu.edu/finance/">https://my.uvu.edu/finance/</a></li> <li>• <b>Guidelines for Establishing Course-Based Fees</b>, <a href="https://www.uvu.edu/academicscheduling/docs/course_fees/guidelines_course-based_fees_sep2023.pdf">https://www.uvu.edu/academicscheduling/docs/course_fees/guidelines_course-based_fees_sep2023.pdf</a></li> <li>• <b>USHE Policy R517 – Course &amp; Program Fees</b>, <a href="https://public.powerdms.com/Uta7295/documents/2022243">https://public.powerdms.com/Uta7295/documents/2022243</a></li> <li>• <b>UVU Policy 607 – Course-Based Fees for Credit Courses</b>, <a href="https://www.uvu.edu/policies/manual/index.html">https://www.uvu.edu/policies/manual/index.html</a></li> </ul>
<p><b>Terminology</b></p>	<ul style="list-style-type: none"> <li>• <b>Administrative Sunset:</b> 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.</li> <li>• <b>Calculation Workbook:</b> 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.</li> <li>• <b>Course Lecture:</b> 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.</li> <li>• <b>Course Lab:</b> Supports the cost of laboratory materials and supplies used in a course within a specific academic space.</li> <li>• <b>Lab Access:</b> Supports the purchase, repair, or replacement of computer hardware within a specific school/college.</li> <li>• <b>Software:</b> Supports the purchase of specialized software licensing for student use within a specific school/college.</li> <li>• <b>Tools:</b> Supports the purchase, repair, or replacement of specialized tooling within a specific school/college.</li> </ul>

<b>Contacts</b>	<p><b>For assistance, please contact the Assistant to the Dean/Finance Manager:</b></p> <ul style="list-style-type: none"> <li>• College of Health and Public Service: <a href="#">Jennyfer Gaede</a></li> <li>• College of Humanities and Social Sciences: <a href="#">Jolene Arnoff</a></li> <li>• College of Science: <a href="#">Kerri Howlett</a></li> <li>• School of the Arts: <a href="#">Karen Watson</a></li> <li>• School of Education: <a href="#">Wendy Oldroyd</a></li> <li>• Smith College of Engineering and Technology: <a href="#">Todd Palmer</a></li> <li>• Woodbury School of Business: <a href="#">Susan Dunn</a></li> </ul>
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## 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.

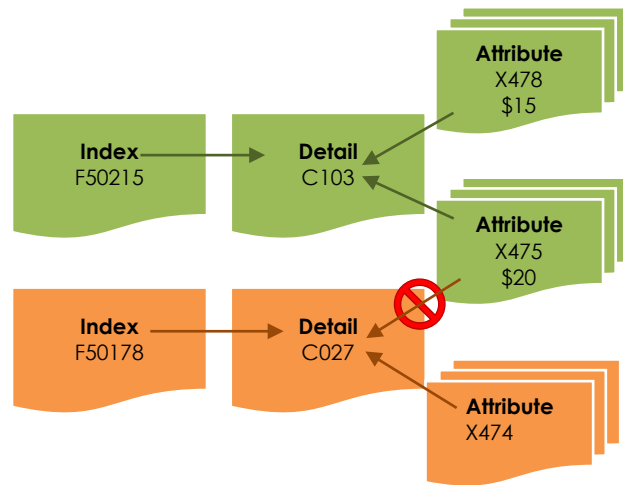


### **Warning!**

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.

Fee Type is...	Detail Code <i>begins...</i>	Attribute Code <i>begins...</i>
Course Lecture	<b>C</b>	<b>X</b>
Course Lab	<b>C</b>	<b>X</b>
Lab Access	<b>L</b>	<b>Z</b>
Software	<b>L</b>	<b>Z</b>
Tool	<b>L</b>	<b>Z</b>



### ? 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 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](mailto: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\\_3qHa2Sp1muRYQDA](https://qualtrics.uvu.edu/employee/SV_3qHa2Sp1muRYQDA). Enter the Banner **Subject Code** and **Course Number** (full or partial) and select it from the drop-down list. For example:

mgmt 3

- MGMT-3000 - Organizational Behavior WE
- MGMT-3020 - Ind Act and Corp Soc Respon
- MGMT-3070 - Total Quality Management
- MGMT-3200 - Global Tourism
- MGMT-330G - Survey Internatl Business GI
- MGMT-332G - Cross Cult Comm Intl Bus GI
- MGMT-3345 - Business Statistics II
- MGMT-3440 - Managing Organizations
- MGMT-3450 - Operations Management**
- MGMT-3460 - Sched Forecast Inventory Mgmt
- MGMT-3470 - Lean Management Systems
- MGMT-3480 - Operations Simulation
- MGMT-3500 - Leadership Theory and App WE
- MGMT-3700 - Supply Chain and Logistics
- MGMT-3730 - Opportunities in Direct Sales
- MGMT-3740 - Relationship Marketing

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:

Add New Course-Based Fee
Change Existing Course-Based Fee
Delete Existing Course-Based Fee
Modify Index and/or Detail Code Only
Return to course selection

**Steps 4 – 13**

**Steps 14 – 17**

**Steps 18 – 19**

**Steps 20 – 23**

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

**NEXT**

Click 'NEXT' to continue.

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


**For more information, including how to APPROVE or DECLINE a request in the Jira workflow, skip to steps 24 - 29 below.**

## Add New Course-Based Fee

(steps 4 – 13)

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	<input type="text" value="C077"/>
Detail Code	<input type="text" value="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



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

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**

**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 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** or **DECLINE** a request in the Jira workflow, skip to steps 24 - 29 below.*

## Change Existing Course-Based Fee

(steps 14 – 17)

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 identical changes to multiple courses of the same 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

No

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

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

**NEXT**

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

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

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](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 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 20 – 23)

---

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 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

23. This question allows a department to submit identical changes to multiple courses of the same 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

No

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

Click **“No”** if this is a single submission.

**NEXT**

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

A future version of the form will include a **“BACK”** button for improved navigation.

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:

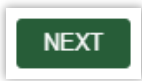
...your list **can**  
include course  
numbers of the  
**same** subject:

**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](https://www.uvu.edu/academicscheduling/fee_reports.html).



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 [online](#), and/or when clicking "View request" from an email you see this message:

We couldn't find any requests

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

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:

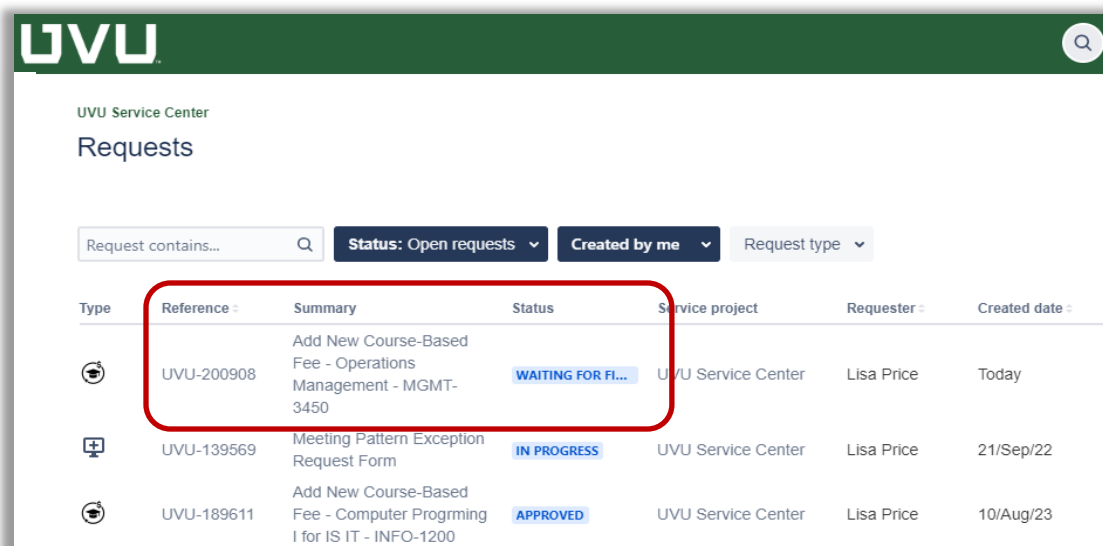
 **Submitted**




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:

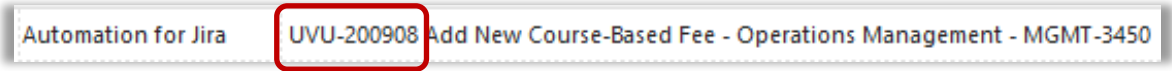


Type	Reference	Summary	Status	Service project	Requester	Created date
	UVU-200908	Add New Course-Based Fee - Operations Management - MGMT-3450	WAITING FOR FI...	UVU Service Center	Lisa Price	Today
	UVU-139569	Meeting Pattern Exception Request Form	IN PROGRESS	UVU Service Center	Lisa Price	21/Sep/22
	UVU-189611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

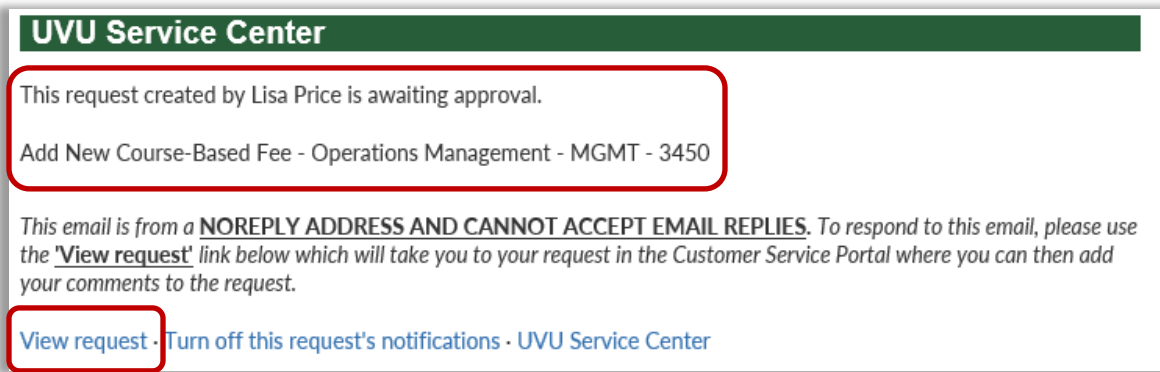
The “**Summary**” column includes Add New along with the subject and course selected in step 1 above.

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.

The screenshot shows a request details page with the following information:

- Course Subject:** MGMT
- Course Number:** 3450
- Course Title:** Operations Management
- Course Description:** Prerequisite(s): Matriculation into WSB and University of Utah. Focuses on the management of resources for project management, supply chain, facility location processes. Emphasizes product/service development and research techniques. May be delivered hybrid and/or online. Canvas Course Mats \$85/McGraw applies. Lab access fee of \$25 for computers applies.
- Supplier Name:** Lenovo
- Unit Size:** EA
- Price Per Unit:** 1523
- Price Per Student:** 43.51
- Property:** Property of UVU
- Replacement Schedule:** None
- New Course Based Fee:** 43.51
- New Fee Type:** None
- Support Doc 1:** [https://uvu.qualtrics.com/jfe/file/F\\_2EjmDy1c3LY9CY1](https://uvu.qualtrics.com/jfe/file/F_2EjmDy1c3LY9CY1)
- Credit Hr Low:** 3
- Lec Hr Low:** 3
- Course Department Desc:** Strat Managmnt and
- Additional Information Needed:** MGMT 2240, MGMT 2340, MGMT 3070, MGMT 3345

**Be aware that a requestor may have supplied a list of courses that use the same Index, Detail, and 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".

This request requires your approval

**Approve**

Decline

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

Automatic response 10/Aug/23 4:12 PM  
Laurie Sharp approved this request.

When finished, you can close the browser tab.