

Date	Activity	Resource
3/18/2013	CFR opens for dept'l updates to increase existing IEEF, Field Trip and Lab Fees	<a href="http://vpfnweb2.tamu.edu/CFR">http://vpfnweb2.tamu.edu/CFR</a>
	1. IEEF revenue increase ( <i>for existing fees</i> ) percentage should be <5.00% overall for the college	run the college's report by selecting the reports tab at the top of the CFR page
	2. Field trips, lab fees and new fees added to a course are <b>exempt</b> from the 5% cap	
3/18 to 4/15/2013	CFR is refreshed with all courses from the Registrar	every two to three days
	Requests for new/increased Differential Tuition for Distance Education forms are prepared and routed for approval. Done once a year for the upcoming fall.	Approved Rates: <a href="http://sbs.tamu.edu/accounts-billing/tuition-fees/schedule/#DIST_ED_DIFF">http://sbs.tamu.edu/accounts-billing/tuition-fees/schedule/#DIST_ED_DIFF</a>
		<a href="http://sbs.tamu.edu/media/114145/distance_education-dtrequest19march13.pdf">http://sbs.tamu.edu/media/114145/distance_education-dtrequest19march13.pdf</a>
	New Course Fee requests are routed through the department to the college.	<a href="http://finance.tamu.edu/sbs/tuition/forms/New-Course-Fee-Request.pdf">http://finance.tamu.edu/sbs/tuition/forms/New-Course-Fee-Request.pdf</a>
	Field Trips that require a new/increased/decreased fee are routed through the department, Study Abroad (if going to a foreign destination) and the college.	<a href="http://sbs.tamu.edu/media/26936/Trip-Request-Form.pdf">http://sbs.tamu.edu/media/26936/Trip-Request-Form.pdf</a>
	New FAMIS Account Request for new course fee accounts are completed & routed to FMO New Accounts. Copy SBS on the email. When the new account is established, email that information to SBS to complete the Detail Code Request form.	<a href="http://finance.tamu.edu/fmo/fr/forms/new-famis-account.pdf">http://finance.tamu.edu/fmo/fr/forms/new-famis-account.pdf</a>  To: <a href="mailto:New-Accounts@tamu.edu">New-Accounts@tamu.edu</a> . SBS cc: Katie Shehi ( <a href="mailto:kshehi@tamu.edu">kshehi@tamu.edu</a> )
	Detail Code Request for new course fees are completed & attached to the New Course Fee request (to set-up Compass billing)  Upload these forms to SBS Sharepoint as they're prepared so the Detail Codes can be set up. Write the date the form is emailed to SBS on the bottom.	<a href="http://sbs.tamu.edu/media/26921/Detail-Code-Request-Form.pdf">http://sbs.tamu.edu/media/26921/Detail-Code-Request-Form.pdf</a>  <a href="https://vpfninternal.tamu.edu/sites/sab/default.aspx">https://vpfninternal.tamu.edu/sites/sab/default.aspx</a>
4/22/2013	New Course Fee request forms are due to PROV from the colleges. College Assistant Deans will collect their departmental requests and submit the recommended approvals to the PROV as one group.	Joe Pettibon ( <a href="mailto:jpp2@tamu.edu">jpp2@tamu.edu</a> ); Alberta Ortiz-Ganem ( <a href="mailto:alberta@tamu.edu">alberta@tamu.edu</a> )
	Differential Tuition for Distance Education forms are due to the Provost (Joe Pettibon)	
	<b>CFR closes for dept'l updates</b>	

Date	Activity	Resource
4/22 to 5/3/2013	PROV prints the CFR revenue reports & contacts colleges to make any necessary corrections to get the IEEF revenue rate <5% (if necessary).	
	PROV checks CFR to ensure that all increased/decreased FT fees have a form; Deborah Wright needs to keep copies of all FT forms.	
	PROV prepares a cover memo from Deborah Wright, through Karan Watson (Joe Pettibon is signature delegate) to President, which includes a summary table of the increases (Field Trip, IEEF {referred to as 'course fees'}, Lab fees) by College with each's revenue increase %age. Make sure the memo has an approval line for Dr. Loftin to approve the summary.	
	PROV summarizes new course fee & field trip fee requests into an Excel spreadsheet (sorted by College, Department, Course #, then section). Forms are sorted into the order that they appear on the summary and are clipped together by college. The department head, the Dean (or delegate) should already have these forms signed. <small>Alberta initials by the PROV approval line to indicate the form is complete &amp; appears on the summary list. All forms are then signed by Joe Pettibon.</small>	
	PROV prepares cover memo, referencing the attached summary for approval, from Deborah Wright, through Karan Watson (Joe Pettibon is signature delegate) to President. <small>Make sure the memo has an approval line for Dr. Loftin to approve the summary.</small>	
	Email both of the memos to Deborah Wright for her to print on the Division of Finance's letterhead.	
	Email the New Course Fee request summary to Deborah Wright	
	Deliver the stack of New Course Fee requests to Deborah Wright.	
	Deliver the printed copies of the CFR's Revenue Reports by college to Deborah Wright.	
	After Deborah Wright reviews and approves the memo(s), she will send it back to the PROV office for Joe Pettibon's review/approval.	
	Joe Pettibone prepares DE Differential Tuition Rate memo to the President, and routes through Provost	
	Joe Pettibon will sign both course fee approval memos, and they are routed to the President for approval.	

Date	Activity	Resource
5/6 to 5/10/2013	Presidential approval is obtained for both New Course Fee requests and course fee increases. The approval memo, summary and all course fee forms are returned to Alberta Ortiz-Ganem	
	Scan a copy of the approved CFR increase request memo, and supporting revenue reports, and email to Student Business Services, CC: the college's Assistant Dean	To: Katie Shehi (kshehi@tamu.edu)
	Scan a copy of the approved New Course Fee request memo, and supporting summary, and email to Student Business Services, CC: the college's Assistant Dean	To: Katie Shehi (kshehi@tamu.edu)
	By college, scan and email the approved New Course Fee forms to the Assistant Dean, with a copy to Student Business Services	To: Katie Shehi (kshehi@tamu.edu)
	Retain the original approval memos (hard copies) in the PROV annual course fee folder; digital copy may be put into Laserfiche to eliminate the need for a paper copy	
	Return the New Course Fee forms via campus mail to each College's Assistant Dean for them to distribute back to their individual departments.	**The Provost's Office will be the keeper of the official record for retention/audit purposes (laserfiche)**
May- July	SBS creates detail codes & adds to COMPASS assessment table	
JULY TBD (for 1 week only)	Departments look in CFR to ensure all approved courses have been added correctly & makes entries for new fees for courses that have been approved; contact SBS directly if any are missing	
JULY TBD	<b>CFR Closes to SBS updates</b>	
Late July	CFR re-loads to COMPASS	
Early August	Student tuition/fee statements are populated with the updated/new fees	

Annual DE Differential Tuition & Course Fee Update and Approval Process- AY2013-2014

<u>Date</u> <u>Type</u>	<u>Activity</u> <u>Definition</u>	<u>Resource</u> <u>Statute</u>
Lab Fee	Funds collected under this section are to be used to cover the general cost of laboratory materials and supplies used by a student. These are accounted for as part of the university's E&G budget.	54.501
Co-Op Fee	\$75 charged to students participating in Cooperative Education to support program services.	55.16
Dist. Ed Differential Tuition	The rate to be charged for distance education courses will range from a minimum of \$40/SCH to a maximum of \$550/SCH. Each academic department will have an individual rate that will be approved annually by the President of Texas A&M University.	55.16
Field Trip Fee	A request for a new fee or a fee increase must be recommended for approval by the Department Head, Dean, Assistant Provost for Finance and Administration, Chair of the Student Fee Review Committee, the Executive Vice President and Provost, and the President. All approved field trips fees are collected and summarized and are forwarded through the Chancellor to the Board of Regents for confirmation each spring. Fees for required field trips must be approved prior to the beginning of the semester in which the field trip will occur. Request for fees associated with required field trips must be submitted within the course fee due dates noted above. Fees for optional field trips should be approved prior to the beginning of the semester or at the earliest time possible thereafter. Once approved, a fee is not resubmitted for approval unless it is to be increased. The department will retain supporting documentation justifying the approved fee, student fee charges and residuals in the event of an inquiry.	55.16
IEEF (generally referred to as "Course Fees")	These fees is used for equipment and software purchase, maintenance, and repair, modification of specialized instructional facilities and expenditures such as material/supplies, services/training, furnishings, and non teaching salaries and fringe benefits associated with the support of instructional enhancement activities that include, but are not limited to, laboratories, lectures, projects, homework, course delivery, and classroom demonstrations which enhance the learning experience of students.	54.504 & 55.16

# SBS Process for New Course Fees/Field Trip Fees

The Course Fee Revision program (CFR) is used to add course fees and required field trip fees to the courses in Compass. Each department is responsible for making sure their fees are correct in the CFR. These fees are then loaded into Compass a couple days before tuition and fees are assessed for the first time each term. After they are loaded in Compass, they can be reviewed on Compass form SSADETL.

The CFR is open for editing of the coming academic year during the spring term, typically mid-March. It will remain open for a period of approximately four weeks. During this time, each department will be responsible for updating the fee amount of all course fees and field trip fees in their respective departments. The Provost office will set the limit for the overall departmental increase allowed each year.

To give someone in your department access to edit fees in the CFR, please contact Katie Shehi, [kshehi@tamu.edu](mailto:kshehi@tamu.edu) or Jennifer Lightfoot, [jlightfoot@tamu.edu](mailto:jlightfoot@tamu.edu) in Student Business Services.

## TO EDIT OR ADD FEES:

- 1) **Bookmark the CFR.** The web address is <https://cas.tamu.edu/cas/login?service=http://vpfnweb2.tamu.edu/CFR/Login.aspx>.
- 2) **Log in.** Log into the CFR program with your net ID and password. On the “Course Fees” tab, next to “Current View,” click to choose your college and then department.
- 3) **Review.** All current courses for the department will be listed along with the sum of the enrollment of the past three terms, the current revenue, the projected revenue and the difference between these two revenues for each course.

## EDIT EXISTING FEES:

- 1) **View your current fees.** You can click the button for “expand all” or you can click on a course individually to see the fee amount. After expanding the course, the button “show details” will further expand the course for section specific fees.
- 2) **Edit your fees.** Enter the increased amount into the box under “proposed.”
- 3) All changes are immediately saved.

## NEW FEES:

- 1) **Add the course to your catalog.** While the CFR is open, the course and section catalog will be updated every two to three days. A fee cannot be added to a course until the course exists in the catalog and has then been updated to the CFR. If you have a new course or section to add, please refer to the Registrar's procedure for adding a new course or new course section.
- 2) **Obtain permission to charge a fee.** The forms for new fees can be found on the "Forms" tab in the CFR. New course fees must first be approved using the New Course Fee Request form. New field trip fees are approved using the Field Trip Request form. These fees are approved through the procedures set forth by the Provost office.
- 3) **Decide what FAMIS account to use.** New course fees will most likely use an existing FAMIS account. New field trips will most likely need a new FAMIS account. Having a one to one relationship between account numbers and field trips will make the accounts easier to reconcile. If a new FAMIS account is needed, fill out the Request for New Account form and submit it to FMO through their procedure.
- 4) **Request a Compass detail code for new accounts.** After the FAMIS account is created, you will need a new Compass Detail Code. The detail code is used in Compass to charge the student and feeds to the FAMIS account nightly. **IF YOU DO NOT HAVE A DETAIL CODE, YOUR FEE WILL NOT BE CHARGED.** Fill out the Compass Detail Code Request form and submit it to SBS through SharePoint. *The Provost Office will forward a copy of all new fee approvals to SBS at the same time they return the approval to the department. In the interest of making sure your fee is charged; please still submit your detail code request through SharePoint. Doing this allows others in SBS to cover the detail code creation if Katie is out of the office.*
- 5) **Add the fee to the CFR.** When the detail code has been created, you are ready to add the fee to the CFR.
  - a. **View your current fees.** You can click the button for "expand all" or you can click on a course individually to see the fee amount. After expanding the course, the button "show details" will further expand the course for section specific fees.
  - b. **Add your new fee.** Click the box under the course name to "add new fee...." Enter the fee amount, choose the detail code from the drop down box and highlight the sections where the fee should be charged. Click "add" and the fee will be added to the course.

- c. All changes are immediately saved.

## **TO ADD FIELD TRIP FEES LATER IN THE YEAR:**

- 1) **What if you need a fee added later in the year?** New field trips are likely to be requested throughout the year. In this case, the above approvals are still needed. The only change is the ability to add the fee to the CFR. There will still need to be a new FAMIS account and a new detail code. Please gather all of the above documentation and contact Katie Shehi directly to have your fee added to both the CFR and Compass.
- 2) **What about trips that are term specific?**
  - a. For trips that are taken only in the spring, for example, but the course is taught all year long, the CFR will not be able to decipher which term to apply the charge. The department will need to notify Katie directly before the bills are sent out to have the fee added to the course for that term.
  - b. If the course is only taught in the spring, for example, go ahead and add the fee to the CFR. When the course shows up in the catalog in Compass during the spring term, the charge will be added.
- 3) **What about optional trips?** Optional field trips are not added to the course because that will cause everyone who registers to be charged for the trip. If an optional trip will be taken during the term, the above approvals are still needed. There will still need to be a FAMIS account and a detail code. Once these are established, the department will need to create a charge file in Excel and submit that through SharePoint. The file will then be loaded into Compass to mass charge only the individuals participating in the trip. Please talk to Katie Shehi directly to obtain instructions on the charge file should the need arise.

## **REPORTS:**

- 1) When you have finished editing or adding fees, click the "Reports" tab. Next to "Report Scope," click to choose your college and department.
- 2) Under the "detailed course fee report" section, you can choose items to show or not show in your report. Leaving everything checked will give you all of your information. Click "generate report."
- 3) The report will generate in Excel.

## **Guidelines for the Expenditure of Instructional Enhancement/Equipment Fee Funds**

Approved November, 26, 2007

The Texas A&M University System Board of Regents has approved the collection of an Instructional Enhancement /Equipment Fee (IE/EF) for the purpose of providing students with a rich learning environment. These guidelines describe the appropriate uses of these funds, the procedures to be followed in their accounting and expenditure, and the disposition of equipment purchased with these funds.

1. The funds generated from the IE/EF will be used for instructional enhancement purposes. Examples of permissible expenditures from these funds include equipment, software, equipment maintenance and repair, and the modification of specialized instructional facilities. Expenditures may also include course related instructional materials and supplies, invited speakers or guest lecturers, services, training, professional development that directly supports and enhances the course development and/or delivery of instruction, furnishings, graders providing timely and relevant feedback, and salaries and fringe benefits associated with the direct support of instructional enhancement activities (excluding teaching salaries).
2. All revenue collected from the IE/EF will be reserved and accounted for in account(s) kept separate from educational and general funds of Texas A&M University and shall be used by the academic college that assesses the fee. The only exception would be cross-listed courses which should be charged at the same rate and the associated revenue should be allocated to the college responsible for enhancing the course. IE/EF account balances, expenditures, and fee structures will be reviewed and updated on an annual basis by academic departments and colleges. This review will be certified annually to the Executive Vice President and Provost.
3. Instructional Enhancement/Equipment Fee funds may be used to support personnel costs as long as these personnel are involved directly in instructional enhancement activities. Salary charges shall be made in proportion to the percentage of time the employee's effort is assigned to the activity supported by the fee. Under no circumstances may teaching salaries—defined as salary payments to individuals performing direct classroom instruction—be paid from the IE/EF. Indirect administrative support salaries are also prohibited on IE/EF funds.
4. Equipment purchased, using IE/EF funds, that is three years or older may be disposed of following University procedures for non-IE/EF surplus property. In addition, equipment that is three years or older may be transferred to departments or other units for use in undergraduate or graduate student offices or laboratories, the Library or other academic initiatives. Equipment that is less than three years old must be used as trade-in for new equipment dedicated



to instructional enhancement activities or sold as surplus property and the proceeds returned to the fee account that originally purchased the equipment.

College and departments must comply with the provisions of State laws and regulations and the TAMUS Equipment Management Manual. This includes numbering or bar-coding all applicable assets, maintaining accurate location records and recording serial number information. Adequate measures must be taken to safeguard against potential loss or damage.

5. Some colleges may opt to retain all or a portion of the funds collected by the IE/EF to create a college pool designated for special projects related to instructional enhancement activities. The funds retained by the college could be allocated in response to requests submitted by the departments for special projects.
6. Any changes or exceptions to these guidelines must be approved by the Executive Vice President and Provost. Colleges may develop procedures for the use of these fees consistent with the parameters set forth in these guidelines.
7. None of the above guidelines shall supersede the authority and purpose of the policies and procedures set forth in the Texas A&M University System Policies and Regulations, and the Texas A&M University Rules and Standard Administrative Procedures.
8. These guidelines also apply to Distance Education Instructional Enhancement fees charged to students residing within the State of Texas. However, DE-IEEF funds collected from out-of-state non-resident students must be segregated from other IEEF funds collected. These segregated funds from out-of-state non-residents can also be used for teaching salaries, promotional activities, and general professional development.