HOW TO RECERTIFY, UPDATE AND DELETE MATERIAL & SUPPLY FEES

To complete the task you must have the UF_SF_COURSEFEE_DEPT_USER security role.

At the beginning of each open period, the University Budget Office will run a Recertification Process that will group all Courses that have associated Material & Supply Fees by Academic Organization into a Request ID.

Departments will be required to take one of the following actions per fee item per course that charges a Material & Supply Fee:

- **Re-Certify** – This means no action is necessary and the Fee Item needs to remain for that Term.
- **Change** – This means an adjustment is needed to update the Annual Cost, update the Fee Description or Add a New Fee Item.
- **Delete** – This means the Fee Item needs to be permanently removed for that Term and future Terms.

1. Log in to myUFL
2. Navigate to: NavBar > Main Menu > Student Information System > Worklist >
   **Worklist**
3. Click the Link to work the Course Fee Request
You will see this Course Fee Request screen.

4. First, verify that the **Academic Organization** for Routing purposes (1) is correct.
   - The application will automatically populate the Academic Organization used in the prior term.

5. Second, verify the **Subject** and **Catalog Nbr** (2) that you will be Re-Certifying.
   - All courses within an Academic Organization are packaged into one Course Fee Request.
   - In this example, there are 10 courses that need to be verified for Academic Organization 16900300.
   - You may navigate from one course to the next using the arrow buttons on the right hand side (3).

6. Update the **Projected Attendance** (4) for the Term if necessary.
   - **Updating the Projected Attendance will impact the Amount Per Student.**
7. For Item 5, you will Re-Certify each Fee Item per course. You will select 1 of 3 options:
   - **Re-Certify** – This means the Fee Item needs to remain for the Term AND the Annual Cost will remain the same.
   - **Delete** – This means you will be removing the Annual Cost of the fee item from this course for the Term and permanently removing the Fee Item for subsequent Terms.
     1) After you select Delete, change the Annual Cost to $0.00.
     2) The Fee Item will remain an allowable expenditure for the Term.
     3) If you try to remove the Fee Item using the delete icon, then you will receive an Error Message.
     4) When the Re-Certification process is run for the next Term, all Fee Items with a status of Delete will be removed.
     5) If the Material & Supply Fee for the entire course needs to be removed and the Amount Per Student should be $0.00, then you will need to Delete each Fee Item.
   - **Change** – This means you need to make a change to the Annual Cost of the Fee Item or you need to update the Itemized Description of the Fee Item.
     1) Select Change first, then change the Annual Cost or Description.
     2) If you do not select Change first, then you will receive an Error Message.

8. You may add New Fee Items by clicking the addition icon (8).
   - When new Fee Items are added, the Re-Certify status is considered a CHANGE since the Previous Annual Amount was zero because the fee didn’t exist before.
• In the Fee Item field, use the Lookup to view all available fees.

![Lookup Fee Item]

Some Fee Items will Require Further Information (7).

Please make the descriptions as clear as possible and itemized so the University Budget Office does not have to contact you for further explanation or Pushback your Request ID.

• Enter the Annual Cost (6).

*Remember, this is the cost for the total purchase, not per student.*

9. The application will automatically calculate the Total Annual Cost (9) by adding the Annual Cost of each Fee Item.

10. When the Annual Cost is entered, the application will calculate the Amount Per Student (10) based on the Projected Attendance. As Fee Items are added or deleted, the application will recalculate automatically when you tab out of the Annual Cost field (6).

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\text{Amount Per Student (10)} = \frac{\text{Total Annual Cost (9)}}{\text{Projected Attendance (4)}}
\]
• If the Amount Per Student is over $50.00 (the maximum allowable fee without Provost Approval) and you would like to override the application calculated Amount Per Student, enter the amount to be charged to the student in the Amount Per Student (Override) field (11).

• If the Amount Per Student is over $50.00 (the maximum allowable fee without Provost Approval) and you would like the fee to remain at that amount, Provost Approval will need to be obtained.

11. Use the Documents button (12) to attach a justification letter signed by the Dean.

The University Budget Office will request Provost Approval on your behalf and notify you via email the status of the request.

12. Use the Add Comments button (13) to provide any additional pertinent information necessary for the Request to be approved.

• If the course has already received Provost Approval in a prior term, please reference the Course Fee Request ID in the comments section.

• Comments will need to be added per course.

13. Once all fee items have been Re-certified for the course, use the right and left arrows (3) to proceed to the next course and Repeat Items 2 – 13.

14. You may Save the Request ID at any point and return later to complete the request and submit.

• The Request may not be submitted until all Fee Items per Course for the entire Academic Organization have been Re-Certified.

• Once you save and sign out of the Recertification Request, the request is available for another Department Re-Certifier with Security Authorization to work the request and Submit.

15. If you Save for later, you may check the Re-Certification Status (3) of the courses that still Need Attention by going to the Course Fee Overview.
• Select **Material & Supply Re-Certify** as the **Course/Class Fee Type** (1), then **Search** (2).

• You may also Search using the **Academic Organization** (4).

• If you click on the **Fee Request ID** blue hyperlink (5), then the application will open the Request ID for you to resume working.

16. Once all courses have been Re-Certified, Click **Submit**.

• The Request will be routed to the Dean/Dean Designee for the Routing Academic Organization that was entered for Item 1.

• After the Request ID has been approved at the College level, the Request will be routed to the Budget Office for Approval.

• You may track your Request by following the below Workflow.
ADDITIONAL NOTES

- If the Request ID is a Pushback, it will be returned to the individual that Submitted the Request. The group of Authorized Re-Certifiers for the Academic Organization will not receive the request back.
- If the Request is Denied, the Request is dead and may no longer proceed with workflow.
- The Budget Office will obtain Provost Approval for M&S Fees over $50.00 per student per course with proper justification.

ADDITIONAL RESOURCES

For assistance with technical issues, please contact the UF Help Desk at 352-392-HELP or helpdesk@ufl.edu.

For assistance with course fees, contact Amber Allen-Ingram at ameldot2@ufl.edu or 352-392-2120.