

HOW TO RECERTIFY, UPDATE AND DELETE EQUIPMENT USE 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 and pieces of equipment by Equipment Pool into a Request ID.

Departments will be required to take one of the following actions per course for each piece of equipment that charges an Equipment Use Fee:

- **Re-Certify** – This means no action is necessary and the Course needs to remain for that piece of equipment for that Term.
- **Change** – This means an adjustment is needed to update the Projected Attendance for the course which changes the Total Units Assessed and the Fee Credit per Hour.
- **Delete** – This means the Course will no longer be allocated costs for the piece of equipment and will 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.

Worklist for UFCSFEEREQ1:

Worklist Filters [dropdown] Feed [dropdown]

Detail View [button]

From	Date From	Work Item	Worked By Activity	Priority	Link	Mark Worked	Reassign
Allen-Ingram, Amber E	08/13/2018	Approval Routing	Approval Workflow		UF SF FEE EQUIPMENT 3, UF FEE EQUIPMENT, 1901-01-02, N, 0, UF FEE REQ ID:000000000001545, UF CRCLS FEE TYPE:R2, RDC:RA,0,U.	Mark Worked	Reassign
Allen-Ingram, Amber E	08/13/2018	Approval Routing	Approval Workflow		UF SF FEE EQUIPMENT 6, UF FEE EQUIPMENT, 1901-01-02, N, 0, UF FEE REQ ID:000000000001548, UF CRCLS FEE TYPE:R2, RDC:RA,0,U.	Mark Worked	Reassign
Allen-Ingram, Amber E	08/13/2018	Approval Routing	Approval Workflow		UF SF FEE EQUIPMENT 8, UF FEE EQUIPMENT, 1901-01-02, N, 0, UF FEE REQ ID:000000000001550, UF CRCLS FEE TYPE:R2, RDC:RA,0,U.	Mark Worked	Reassign
Allen-Ingram, Amber E	08/13/2018	Approval Routing	Approval Workflow		UF SF FEE EQUIPMENT 9, UF FEE EQUIPMENT, 1901-01-02, N, 0, UF FEE REQ ID:000000000001551, UF CRCLS FEE TYPE:R2, RDC:RA,0,U.	Mark Worked	Reassign

Personalize | Find | View All | [dropdown] | [dropdown] | First 1-25 of 66 Last

You will see this Course Fee Request screen.

The screenshot shows the 'Course Fee Request' screen with the following elements highlighted by numbered callouts:

- 1:** Course/Class Fee Type: Equipment Re-Certification
- 2:** *Pool ID: 1305DIGIT
- 3:** Equipment Name: 20EVE Projection System
- 4:** Navigation buttons: First, 1 of 1, Last
- 5:** Maintenance & Insurance: \$3,200.00
- 6:** Re-Certify Request dropdown menu
- 7:** Course Data tab
- 8:** Projected Attendance: 25
- 9:** Re-Certify Request dropdown menu (expanded)
- 10:** Fee Credit Hour: \$9.07
- 11:** Cost table
- 12:** Documents button
- 13:** Add Comments... button

Equipment Header Information...

SetID: UFLOR University of Florida

*Pool ID: 1305DIGIT 1305DIGIT: Digital Worlds Lab

*Term: 2191 Spring 2019

Comment: [Text Area]

Equipment...

Equipment/Materials Code: [Text Box]

Equipment Name: 20EVE Projection System

Useful Life: 10

Cost To Replace: \$104,078.15

Maintenance & Insurance: \$3,200.00

Units: 1.00

Cost

Annual Replacement Cost	\$10,407.82
Annual Unit Cost	\$13,607.82
Total Annual Cost	\$13,607.82
Use Cost (Undergraduate)	\$2,041.17

Equipment Usage...

Use Source	Percent Used
Graduate	40.000
Other	5.000
Research	40.000
Undergraduate	15.000

Equipment Associated Courses...

Acad Org	*Course ID	*Course Offering Nbr	Subject	Catalog Nbr	Credits	Projected Attendance	Total Units Assessed	Previous Fee Credit Hour	Fee Credit Hour	Estimated Revenue	Re-Certify Request
13050000	024032	1	DIG	4283	3.00	25	75.00	0.00	\$9.07	\$680.25	[Change, Delete, Re-Certify]
13050000	026948	1	DIG	3588C	3.00	25	75.00	0.00	\$9.07	\$680.25	[Change, Delete, Re-Certify]
13050000	027307	1	DIG	4940	3.00	25	75.00	0.00	\$9.07	\$680.25	[Change, Delete, Re-Certify]

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 **Pool ID** (2) that you will be Re-Certifying.
 - You will have one Course Fee Request per Pool ID.
6. Third, you will be certifying each course per piece of equipment.
 - Verify the **Equipment Name** (3) and make any necessary description adjustments.
 - **DO NOT** rename the piece of equipment.
 - You may navigate from one piece of equipment to the next using the left and right arrow buttons (4).

7. Update the Equipment Details (5) if necessary.

- Useful Life
- Cost To Replace
- Maintenance & Insurance
- Number of Units
- Percent Used per Source

Updating any of this information will impact the Use Cost (Undergraduate) and ultimately the Fee per Credit Hour.

8. For Item 6, you will Re-Certify each Course (7) per piece of equipment that has costs allocated. You will select 1 of 3 options:

- **Re-Certify** – This means the Course needs to remain for the Term **AND** the Projected Attendance will remaining the same.
- **Delete** – This means you will not be allocating costs to the course for this piece of equipment for the Term and permanently removing the Course for subsequent Terms.
 - 1) After you select **Delete**, change the Projected Attendance to zero.
 - 2) This will adjust the **Total Units Assessed** and the **Fee Credit Hour**.
 - 3) When the Re-Certification process is run for the next Term, all Courses with a status of **Delete** will be removed.
- **Change** – This means you need to make a change to the **Projected Attendance** (8) or you updated the **Equipment Details** which changed the **Fee per Credit Hour**.
 - 1) If the **Fee per Credit Hour** changes from the **Previous Fee Credit Hour**, select **Change**.

9. You may add new courses by clicking the **addition icon** (9).

- When new courses are added, the Re-Certify status is considered a **CHANGE** since the Previous Fee per Credit Hour was zero because the course didn't exist before.

- Enter the **Course ID** and **Course Offering Nbr.** If you do not know the Course ID, click the Lookup and you can Search by Subject Area and Catalog Nbr. If there is only one course offering number, then the application will automatically populate the value.

- Enter the **Course Credit Hours.**

- 1) Student credit hours will be obtained using Institutional Research SCH Cube. An explanation must be provided if there is a difference between the Institutional Research SCH Cube and the hours to be assessed
- 2) Enter the **Projected Attendance**, enter the number of students you expect to enroll in the Course for that Term.

10. The application will automatically recalculate the **Total Units Assessed** and ultimately the **Fee Credit per Hour** (10).

- **Total Units Assessed** = Course Credit Hours X Projected Attendance
- **Fee Credit Hour** = $\frac{\text{Use Cost (Undergraduate)}}{\text{Sum of Total Units Assessed}}$

Credits	Projected Attendance	Total Units Assessed	Previous Fee Credit Hour	Fee Credit Hour	Estimated Revenue
3.00	8	24.00	1.71	\$1.71	\$41.04
3.00	8	24.00	1.71	\$1.71	\$41.04
3.00	160	480.00	1.71	\$1.71	\$820.80
3.00	14	42.00	1.71	\$1.71	\$71.82
3.00	7	21.00	1.71	\$1.71	\$35.91

591

- To add or delete another piece of equipment, you may use the addition/deletion icons (11) in the Equipment Box and Repeat Items 5 – 10.
- Once all courses per piece of equipment have been Certified and the costs have been allocated to the appropriate course/courses, use the **View Summary For Approval** button to review the Equipment Detail and Course Totals.



You will see this Summary page.

Course/Fee Request ID: 00000000002170
 Course/Class Fee Type: Equipment Re-Certification
 Course/Class Fee Status: Re-Certly Pending - 1
 Routing Academic Organization: 13050000

Pool ID: 1305DIGIT Term: Spring 2019
 Comment: [Empty text box]
 Add Comments...

Equipment: 20EVE Projection System

Academic Organization	Course ID	Course Offering Nbr	Subject	Catalog Nbr	Total Units Assessed	Fee Credit Hour	Estimated Revenue
13050000	024032	1	DIG	4283		75.00	\$680.25
13050000	026948	1	DIG	3588C		75.00	\$680.25
13050000	027307	1	DIG	4940		75.00	\$680.25
Total Estimated Revenue						\$2040.75	
Annual Unit Cost						\$40823.46	

Course Totals...

Academic Organization	Course ID	Course Offering Nbr	Subject Area	Catalog Nbr	Units Taken	Projected Attendance	Fee Credit Hour	Dept. Override Fee Per Hour	Dean Override Fee Per Hour	Budget Override Fee Per Hour	Account Type	Item Type
13050000	024032	1	DIG	4283	3.00	25	\$5.44				TUI	211130500036
13050000	026948	1	DIG	3588C	3.00	25	\$5.44				TUI	211130500034
13050000	027307	1	DIG	4940	3.00	25	\$5.44				TUI	211130500037

- If the Course Total is over \$30.00 per fee credit hour, the maximum allowable fee without Provost Approval, and you would like to override the application calculated Fee Credit Hour, enter the amount to be charged per fee credit hour in the **Dept. Override Fee Per Hour** field.
- If the Course Total is over \$30.00 per fee credit hour, 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.

- Use the **Documents** (12) button to attach a justification letter signed by the Dean. The Documents button is on the Equipment Detail page and the View summary for Approval page.
 - The University Budget Office will request Provost Approval on your behalf and notify you via email the status of the request.
15. If any adjustments need to be made, use the **Equipment Detail** button to return to the Equipment Detail screen and make any necessary adjustments.
16. 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.
17. 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 Courses per piece of equipment for the entire Pool ID 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.
18. 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 **Equipment Re-Certification** as the **Course/Class Fee Type** (1), then **Search** (2).
 - You may also Search using the Pool ID (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.

Course Fee Comments

Add A Comment

Type Comment, then click Add Comment

Add Comment Cancel Comment

Course Fee Overview

Use this page to view a summary of Equipment/Material Supply and courses for the specified selection.

Filters...

Course/Class Fee Type: **Equipment Re-Certification** 1 Subject:

Course/Class Fee Status: Catalog Nbr:

Term: Course ID: 2 Clear

Academic Organization: 4 Pool ID: 3 Search

Summary Of Course Fees...

Fee Request ID	Course Offering Nbr	Course/Class Fee Type	Course/Class Fee Status	Term	Academic Organization	Subject	Catalog Number	Item Type	Item Type Description	Amount	Override Fee Per Hour	Course ID	Course Description	Re Certification Status	Pool ID
00000000001543 5	1	EU Recert	Re-Certly	2191	19050000	EEE	3308C	211190500022	EEE3308C Equipment Fee	\$2.780	\$0.00	011720	Electronic Circuits 1	Needs Attention	1905EEL
000000000001543	1	EU Recert	Re-Certly	2191	19050000	EEE	4511C	211190500030	LLL4511C Lquipment Fee	\$6.110	\$0.00	027061	Real Time Dsp Apps	Needs Attention	1905EEL
000000000001543	2	FU Recert	Re-Certly	2191	19050000	FFL	3111C	211190500001	FFL3111C Equipment Fee	\$6.970	\$0.00	011712	Circuits 1	Needs Attention	1905FFL
000000000001543	1	FU Recert	Re-Certly	2191	19050000	FFL	3211C	211190500025	FFL3211C Equipment Fee	\$165.830	\$45.00	011715	Basic Electric Energy	Needs Attention	1905FFL
000000000001543	1	FU Recert	Re-Certly	2191	19050000	FFL	3701C	211190500013	FFL3701C Equipment Fee	\$0.350	\$0.00	017114	Digit Logic/Compu Sys	Needs Attention	1905FFL
000000000001543	1	FU Recert	Re-Certly	2191	19050000	FFL	3744C	211190500024	FFL3744C Equipment Fee	\$0.510	\$0.00	011753	Microprocessor Applic	Needs Attention	1905FFL
000000000001543	1	FU Recert	Re-Certly	2191	19050000	FFL	3823C	211190500021	FFL3823C Equipment Fee	\$49.010	\$30.00	025508	Elec Engr Design 1	Needs Attention	1905FFL
000000000001543	1	FU Recert	Re-Certly	2191	19050000	FFL	4657C	211190500028	FFL4657C Equipment Fee	\$26.840	\$20.00	011749	Linear Control System	Needs Attention	1905FFL
000000000001543	1	FU Recert	Re-Certly	2191	19050000	FFL	4712C	211190500014	FFL4712C Equipment Fee	\$0.400	\$0.00	011750	Digital Design	Needs Attention	1905FFL
000000000001543	1	FU Recert	Re-Certly	2191	19050000	FFL	4924C	211190500019	FFL4924C Equipment Fee	\$69.720	\$30.00	011755	Elec Engr Design 2	Needs Attention	1905FFL

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

Request Actions...

Submit
Approve
Deny
Pushback

- The Submit button is ONLY on the View Summary for Approval page.
- 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.

Department Re-Certification

▼ UF_FEE_REQ_ID=00000000001638, UF_CRSCLS_FEE_TYPE=R1:Pending

Notify Department Re-Certify

Pending

 UFCRSFEEREQ1
Fee Request User List

Dean Re-Certification

▼ UF_FEE_REQ_ID=00000000001638, UF_CRSCLS_FEE_TYPE=R1:Awaiting Further Approvals

Notify Dean Re-Certify

Not Routed

 UFCRSFEEREQ1
Fee Request User List

Budget Office Re-Certification

▼ UF_FEE_REQ_ID=00000000001638, UF_CRSCLS_FEE_TYPE=R1:Awaiting Further Approvals

Notify Budget Office Re-Certif

Not Routed

 UFCRSFEEREQ1
Fee Request User List

 Save  Return to Search

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 Equipment Use Fees over \$30.00 per credit hour 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.