

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.

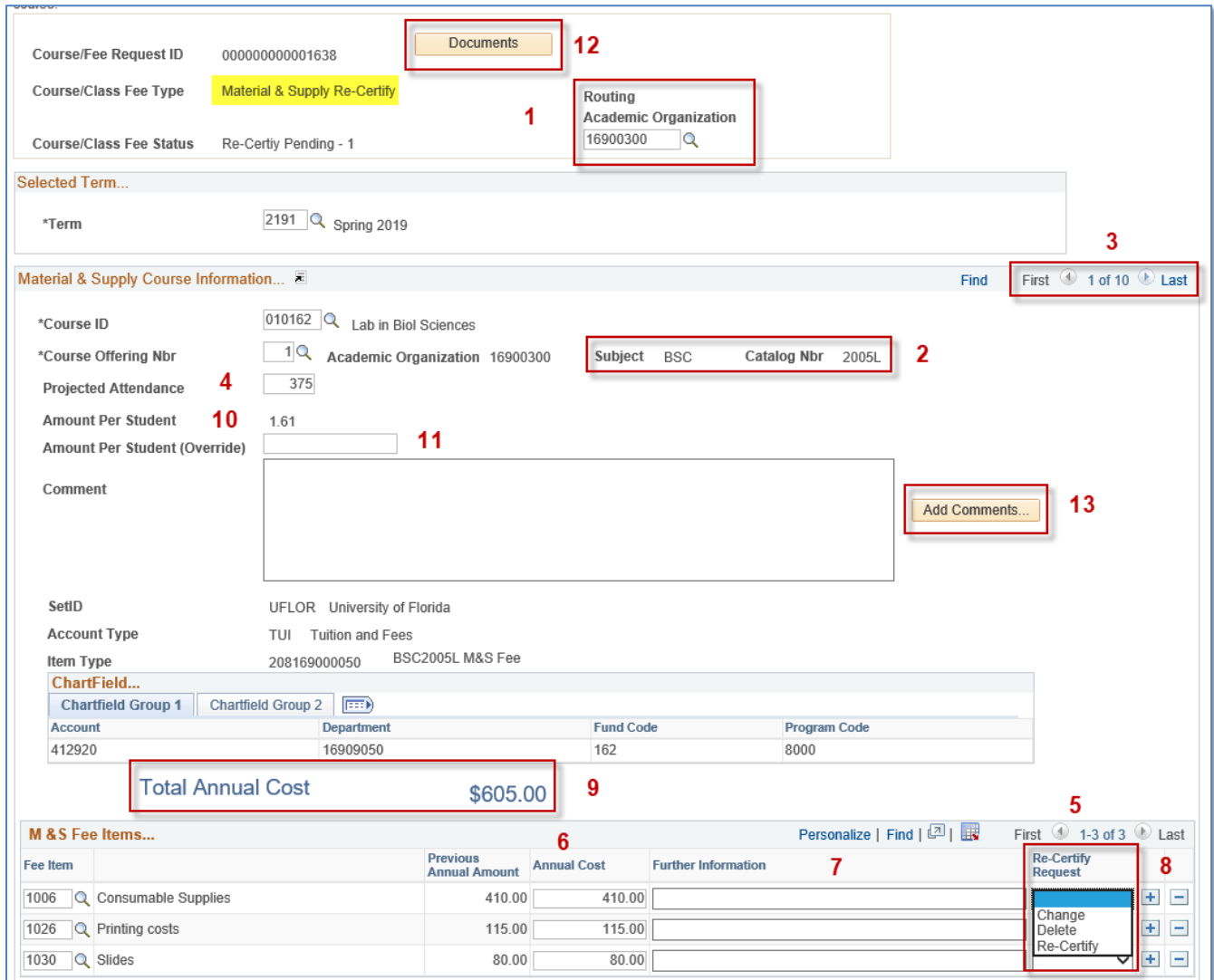
1. Log in to [myUFL](#)
2. Navigate to: [NavBar](#) > [Main Menu](#) > [Student Information System](#) > [Worklist](#) >

Worklist

3. Click the [Link](#) to work the Course Fee Request

Worklist							
Worklist for UFCRSFEEREQ1:							
Detail View		Worklist Filters		Feed		Personalize Find View All [Print] [Refresh]	
Worklist Items						First 1-25 of 66 Last	
From	Date From	Work Item	Worked By Activity	Priority	Link		
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 CRSCLS 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 CRSCLS 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 CRSCLS 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 CRSCLS FEE TYPE:R2 RDC:RA:0.U.	Mark Worked	Reassign

You will see this Course Fee Request screen.



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

- 1:** Routing Academic Organization dropdown menu.
- 2:** Subject (BSC) and Catalog Nbr (2005L) fields.
- 3:** Navigation buttons (First, 1 of 10, Last) for the course list.
- 4:** Projected Attendance input field.
- 5:** Total Annual Cost field showing \$605.00.
- 6:** M & S Fee Items table.
- 7:** Further Information column in the fee items table.
- 8:** Action buttons (Re-Certify Request, Change, Delete, Re-Certify) for fee items.
- 9:** Total Annual Cost field.
- 10:** Amount Per Student input field.
- 11:** Amount Per Student (Override) input field.
- 12:** Documents button.
- 13:** Add Comments... button.

Course/Fee Request ID: 00000000001638

Course/Class Fee Type: Material & Supply Re-Certify

Course/Class Fee Status: Re-Certify Pending - 1

Selected Term...: *Term: 2191 Spring 2019

Material & Supply Course Information...:

*Course ID: 010162 Lab in Biol Sciences

*Course Offering Nbr: 1 Academic Organization: 16900300

Projected Attendance: 4

Amount Per Student: 10 1.61

Amount Per Student (Override): 11

Comment: Add Comments... 13

SetID: UFLOR University of Florida

Account Type: TUI Tuition and Fees

Item Type: 208169000050 BSC2005L M&S Fee

ChartField...:

Account	Department	Fund Code	Program Code
412920	16909050	162	8000

Total Annual Cost: \$605.00 9

M & S Fee Items...: 6

Fee Item	Previous Annual Amount	Annual Cost	Further Information
1006 Consumable Supplies	410.00	410.00	
1026 Printing costs	115.00	115.00	
1030 Slides	80.00	80.00	

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.

Look Up Fee Item

Fee Item: begins with []

Description: begins with []

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-34 of 34 Last

Fee Item	Status as of Effective Date	Description
1000	Active	Adhesives
1001	Active	Batteries
1002	Active	Blueprints
1003	Active	CD's
1004	Active	Chemicals
1005	Active	Construction Documents
1006	Active	Consumable Supplies
1007	Active	Copy costs
1008	Active	Copy paper
1009	Active	Disposable Items
1010	Active	Epoxies
1011	Active	Fabrics
1012	Active	Feed
1013	Active	Fertilizers
1014	Active	Flip Charts
1015	Active	Gasoline (field trips)

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.

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

$$\text{Amount Per Student (10)} = \frac{\text{Total Annual Cost (9)}}{\text{Projected Attendance (4)}}$$

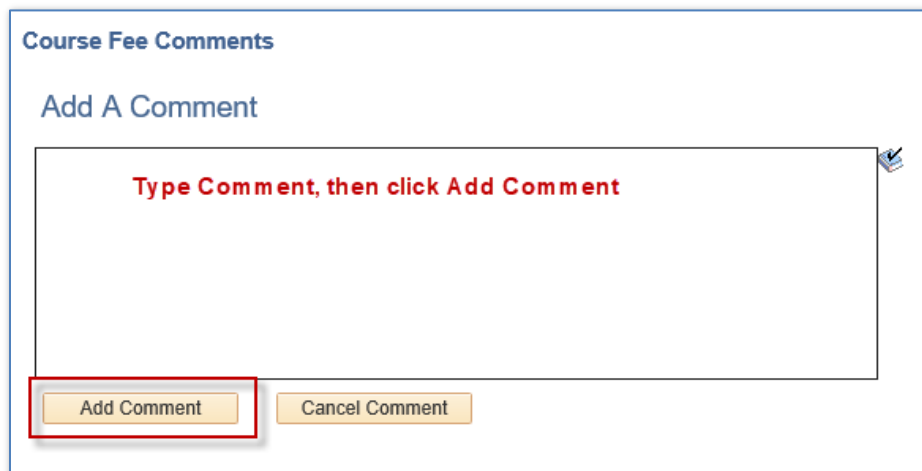
- If the Amount Per Student is over \$50.00 (the maximum allowable fee without Provost Approval) and you would like to override the application calculated Amount Per Student, enter the amount to be charged to the student in the **Amount Per Student (Override)** field (11).
- If the Amount Per Student 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.

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: Material & Supply Re-Certify (1) Subject: []
 Course/Class Fee Status: [] Catalog Nbr: []
 Term: [] Course ID: []
 Academic Organization: [] (4) Pool ID: []

Clear () Search (2)

Summary Of Course Fees... (3)

Fee Request ID (5)	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
00000000001620	1	M&S Recert	Denied	2191	16000000	IUF	1000	208160000001	IUF1000 M&S Fee	\$14.660	\$10.65	026228	What is the Good Life	Completed
00000000001656	1	M&S Recert	Re-Certify	2191	19140000	CAP	3027	208130500020	CAP3027 M&S Fee	\$73.050	\$50.00	024718	Intr Digtl Art/Scienc	Completed
00000000001679	1	M&S Recert	Re-Certify	2191	33070000	CLP	6946	208330700007	CLP6946 M&S Fee	\$23.330	\$0.00	017943	Adv Prac Appl Med Psy	Completed
00000000001679	1	M&S Recert	Re-Certify	2191	33070000	CLP	6430	208330700001	CLP6430 M&S Fee	\$75.000	\$0.00	025303	Clin Psychol Assessmt	Completed
00000000001679	1	M&S Recert	Re-Certify	2191	33070000	CLP	6945	208330700006	CLP6945 M&S Fee	\$20.000	\$0.00	020089	Adv Pract Neuropsych	Completed
00000000001679	1	M&S Recert	Re-Certify	2191	33070000	CLP	6943	208330700010	CLP6943 M&S Fee	\$50.000	\$0.00	010894	Core Prac Clin Psy	Completed
00000000001679	1	M&S Recert	Re-Certify	2191	33070000	CLP	6948	208330700008	CLP6948 M&S Fee	\$17.500	\$0.00	020090	Adv Prac Clin Child Psy	Completed
00000000001680	1	M&S Recert	Re-Certify	2191	34030000	DEN	5100C	208290100004	DEN5100C M&S Fee	\$0.000	\$0.00	020201	Gross Anatomy	Completed
00000000001681	1	M&S Recert	Re-Certify	2191	34080000	DEN	6250C	208340800001	DEN6250C M&S Fee	\$9.680	\$0.00	011055	Pain Control in Dent	Completed
00000000001682	1	M&S Recert	Re-Certify	2191	34100000	DEN	8827L	208340100066	DEN8827L M&S Fee	\$35.830	\$35.80	020624	Clin Pediatric Den 2	Completed
00000000001682	1	M&S Recert	Re-Certify	2191	34100000	DEN	8828L	208340100065	DEN8828L M&S Fee	\$39.330	\$0.00	020667	Clin Pediatric Den 3	Completed
00000000001682	1	M&S Recert	Re-Certify	2191	34100000	DEN	7825L	208340100067	DEN7825L M&S Fee	\$18.460	\$0.00	020443	Clin Pediatric Den 1	Completed
00000000001697	1	M&S Recert	Re-Certify	2191	60320000	FYC	3005	208603200006	FYC3005 M&S Fee	\$15.000	\$0.00	026218	Intraproctamiflplan	Completed
00000000001699	1	M&S Recert	Denied	2191	60466000	SUR	4501C	208604600045	SUR4501C M&S Fee	\$5.000	\$0.00	017854	Foundat UAS Mapping	Completed
00000000001700	1	M&S Recert	Re-Certify	2191	60470000	WIS	3402L	208604700002	WIS3402L M&S Fee	\$34.560	\$0.00	024931	Wildlife Florida Lab	Completed
00000000001700	1	M&S Recert	Re-Certify	2191	60470000	WIS	4547C	208604700006	WIS4547C M&S Fee	\$50.000	\$0.00	023680	Avian Field Research	Completed
00000000001700	1	M&S Recert	Re-Certify	2191	60470000	WIS	4945C	208604700009	WIS4945C M&S Fee	\$39.500	\$0.00	019122	Wildlife Techniques	Completed
00000000001700	1	M&S Recert	Re-Certify	2191	60470000	WIS	4443C	208604700005	WIS4443C M&S Fee	\$45.000	\$0.00	016940	Welland Wildl Ecology	Completed
00000000001700	1	M&S Recert	Re-Certify	2191	60470000	WIS	4427C	208604700004	WIS4427C M&S Fee	\$35.140	\$0.00	023467	Wildl Habitat Manage	Completed
00000000001609	1	M&S Recert	Re-Certify	2191	13010000	HUM	2592	208130400132	HUM2592 M&S Fee	\$59.520	\$50.00	026146	Intro Arts Medicine	Needs Attention
00000000001610	1	M&S Recert	Re-Certify	2191	13020000	PGY	2441C	208130200161	PGY2441C M&S Fee	\$182.820	\$65.00	021178	Photo: Image Order Id	Needs Attention
00000000001610	1	M&S Recert	Re-Certify	2191	13020000	ARH	3585	208130200031	ARH3585 M&S Fee	\$10.000	\$0.00	019539	The Arts of Oceania	Needs Attention
00000000001610	1	M&S Recert	Re-Certify	2191	13020000	ART	2752C	208130200087	ART2752C M&S Fee	\$68.500	\$50.00	024849	Throwing Skill/Concep	Needs Attention

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

Request Actions...

Submit (1) Approve () Deny () Pushback ()


- 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 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.