Bursar’s Office
Tuition and Fees

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Financial Services Certification
Tuition and Fees Agenda

1. Types of Fees
2. New, Increased and Decreased Fees
3. Course Fee Revenues
4. Guaranteed Tuition Plans
5. Departmental Payments
6. Banner Posting to FAMIS
1. TYPE OF FEES
TUITION

- **Statutory** (Resident/Non-Resident) – Charged to all students and amount is determined by the Texas Legislature (Resident) and the Texas Higher Education Coordinating Board (Non-Resident)

- **Designated** – Charged to all students

- **Graduate** – Charged to all graduate level (G and GD) students

- **Differential** – Charged to all students in a Business, Nursing or Health Science majors
# MANDATORY FEES

A fee authorized by statute or the governing board of an institution that is charged to a student upon enrollment.

<table>
<thead>
<tr>
<th>Student Service Fee</th>
<th>University Services Fee (Consolidating 10 Fees Effective Fall 2014)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Computer Use</td>
</tr>
<tr>
<td></td>
<td>Library Use</td>
</tr>
<tr>
<td></td>
<td>ID Maintenance</td>
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<tr>
<td></td>
<td>Energy Fee</td>
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<tr>
<td></td>
<td>Record Maintenance</td>
</tr>
<tr>
<td></td>
<td>International Education</td>
</tr>
<tr>
<td></td>
<td>Scholarship Endowment</td>
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<tr>
<td></td>
<td>Environmental Service Fee</td>
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<tr>
<td></td>
<td>Advising Fee</td>
</tr>
<tr>
<td></td>
<td>Instructional Enhancement Fee</td>
</tr>
</tbody>
</table>

- Student Service Fee
- Athletic Fee
- Student Center
- Health Services
- Recreational Sports
- International Processing (Int’l students only)
- Course Specific Fees
COURSE SPECIFIC FEES

- A mandatory fee required of all students enrolled in a given course
  - Lab
  - Distance Education
  - Field Trip
  - Study Abroad
  - E-Line Fee
OPTIONAL FEES

- A fee that the institution is permitted, but not required by statute, to charge all students
- These fees are charged based upon student requests or actions
  - Parking Permit Fee
  - Late Fees
  - Orientation Fee
  - Application Fee
  - Graduation Application Fee
  - Installment Plan Processing Fee
  - Etc...
2. New, Increased and Decreased

- Who has Approval Authority?
- How do fee changes occur?
- What information is needed to consider changes?
All changes to fees must go through an approval process before they can be implemented, including decreasing of a fee (System Policy 26.01 Tuition and Fees and University Policy 26.01.01.C1.01 Tuition and Fees Procedure).

All fee changes must be approved by the Board of Regents with a few exceptions. *The President must approve all fee changes.*

Course Specific Fees must go through the approval process prior to the creation of the schedule for the term in which they become effective.

Approvals of new, increased, or decreased fees are typically granted once a year for the ensuing academic year, and the process for submission and review typically takes place beginning in November of each year for the next academic year.
Overview Continued....

- All fees must be in compliance with the Texas Education Code that supports charging the fee to the students.

- Most fees are supported by Chapter 54 of the Education Code.

- Designated Tuition requires that a public hearing be held prior to the fee increasing.

- Some fees require majority vote by the student body or student government before they can be increased.

- Some fees only require a student vote when the fee is increased more than a legislatively specified percent since the last voter approved increase.
Who has final approval on fee changes?

<table>
<thead>
<tr>
<th>BOARD OF REGENTS APPROVAL</th>
<th>PRESIDENT APPROVAL ONLY</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Tuition</td>
<td>• Field Trip Fees</td>
</tr>
<tr>
<td>• Mandatory Fees</td>
<td>• Study Abroad Fees</td>
</tr>
<tr>
<td>• Course Specific Fees</td>
<td>• Lab Fees (legislative max $30, minimum $2)</td>
</tr>
<tr>
<td>• Optional Fees</td>
<td></td>
</tr>
</tbody>
</table>
Board Approval Fee Request Process
New, Increased and Decreased Fees

November
Dept Receives Instructions and Forms from Bursar

December
Dept completes forms and sends to their VP

January
VP submits the fee request to the Bursar

February
Bursar compiles the requests into a summary for the EVP of F&A

March
After EVP of F&A reviews Bursar submits to System Office

April
System Office submits to the Board of Regents

May
Board of Regents votes

June
Approved fees are updated in Banner

July
Tuition and Fees are calculated for Fall
BASICS OF REQUEST FORMS

- **Justification Form**
  - Justification and proposed use of the increased, new or decreased fee
  - Public hearing and/or student referendum requirements
  - Budget impact if fee request is not approved
  - Justification for ending balance (fund balance)

- **Budget Sheet**
  - Calculate estimated revenue
  - Calculate estimated exemptions
  - List the expenditures that will be covered by fee (salaries, wages, equipment, etc..)
  - Increased and Decreased fees are compared to current budget revenues and expenditures
Course Fee Requests Approval Process
Field Trip Fees and Lab Fees

November
Dept Receives Instructions and Forms

December
Completed Forms sent to Provost

December
Provost sends signed forms to Bursar

January
Bursar compiles the requests into a summary for the EVP of F&A & President

January
President sends approved request to Bursar

January
Bursar updates catalog and tables in Banner

January
Registrar rolls schedule for Fall forward

February
Bursar rolls calc tables to Fall and updates rules

March
Departments check that their class fees are showing up correctly

Tuition and Fees Course
BASICS OF REQUEST FORMS

- **Request Form**
  - Subject, Course # and Course Name
  - Type of Fee (Field Trip or Lab Fee)
  - Current Amount of Fee
  - Proposed Amount of Fee
  - Number of Students Affected
  - Justification and Proposed Use of Fee
  - Budget Impact if not approved

- **Summary of Requested Fees**
  - List all courses that the department is requesting a change
  - Signature of Dean of the College and Provost

- **No Budget Sheet Required for Lab or Field Trip Fees**
Study Abroad Fees

- Approval process is the same as Field Trips and Lab Fees with a few exceptions
  - Study Abroad fees can be requested at different times during the year
    - Study Abroad fees must be approved by the President prior to advertising the cost.
    - Ideally the fee should be through the entire approval process at least three to four months prior to registration.
  - Once the Office of International Education has been informed that a department is interested in creating a Study Abroad Trip they contact the Bursar’s Office to get the appropriate fiscal years forms.
  - Study Abroad fees are also set up so that some or all of the fee is collected prior to registration in the form of deposits to pay for expenses (i.e. airplane tickets, deposits for hotel, etc...) that must be made prior to normal semester payment due dates.
What the Bursar’s Office looks for

- Reviews all requests
- Makes sure they are in compliance with the Education Code
- Reviews for grammatical and spelling errors
- Makes sure all requests are formatted consistently before submission to the System Office
- Verifies that the budget sheets (with help of the Budget Office) are calculated correctly
3. What do course fee revenues cover?

- Distance Education Fees
- Lab Fees
- Field Trip Fees
- Study Abroad Fees
Distance Education Fees

These funds can be used for the following types of expenditures if they directly support distance education:

- Salaries-instructional & support staff
- Wages
- Material/Supplies
- Services/Training
- Marketing
- Software Purchases
- Food & Meals
- Maintenance & Repair
- Furnishings & Equipment
- Travel (with prior authorization from the Assoc. VP for Academic Affairs)
Other Course Fees

- **Lab Fees** cover the cost of laboratory materials and supplies used by a student enrolled in the course.

- **Field Trip Fees** are assessed to cover the cost of providing trips and vary depending on the course taken and expected expenses.

- **Study Abroad Fees** are assessed to cover the cost of providing trips and vary depending on the destination and expected expenses.
4. Guaranteed Tuition Plans

- What is a Guaranteed Tuition Plan?
- Why offer Guaranteed Tuition Plans?
- What is included/excluded in the plans?
- Who is eligible for the Plans?
- How long are tuition rates Guaranteed?
What is a Guaranteed Tuition Plan?

A Guaranteed Tuition Plan is a plan where a student is guaranteed to pay tuition at the same rate for a set number of semesters.
Why offer Guaranteed Tuition Plans?

- Legislation (HB29) require universities to offer a Guaranteed Tuition Plan
- Board of Regents (BOR) mandated that the Guaranteed Tuition Plan include not just tuition but also most fees for Undergraduate Resident students
- The plan is intended:
  - To help families plan for tuition costs
  - To incentivize timely degree completion
What is included/excluded in the plans?

- **Included:**
  - Tuition (Statutory, Designated and Differential)
  - Mandatory Fees (e.g. Student Services, University Service, Athletic, etc.)

- **Excluded:**
  - Lab Fees
  - Field Trip Fees
  - Distance Education Fees
  - Three Peat Fees
  - Excess Credit Hours Fees
  - Non-Mandatory Fee (e.g. Parking Permit, etc...)
  - Room and Board
  - Books and Supplies
  - Etc...
Who is eligible for the plans?

- Eligible:
  - Resident Undergraduate Students
  - Rates have been established for the following
    - Freshman, First-Time in College, Transfer and Currently Enrolled students with less than 30 SCH
    - Sophomores (Transfer and Currently Enrolled) – 30 to 59 SCH
    - Juniors (Transfer and Currently Enrolled) – 60 to 89 SCH
    - Seniors/Post Baccalaureate (Transfer and Currently Enrolled) – 90+ SCH

- Not Eligible (Rates will change each year):
  - Non-resident Undergraduate Students
  - Resident Graduate Students
  - Non-Resident Graduate Students
How long are tuition rates Guaranteed?

- Freshman Cohort – 4 years (12 consecutive semesters)
- Sophomores Cohort – 3 years (9 consecutive semesters)
- Juniors Cohort – 2 years (6 consecutive semesters)
- Seniors/Post Baccalaureate Cohort – 1 year (3 consecutive semesters)

When a cohort expires the student will be placed in the incoming Freshman cohort for an additional 4 years

- Example: Freshman Cohort for Fall 2014
  - Will expire Summer 2018
  - Fall 2018 will be changed to Freshman Fall 2018 cohort

- There will be an appeals committee for extenuating circumstances
5. Departmental Payments

✓ Can a department pay for Tuition & Fees?
✓ What is the Submission Process?
✓ How do you calculate the payment amount?
Can I Pay Tuition and Fees?

- Tuition and Fees can be paid by a Grant account provided that it was included in the proposal and approved by the granting agency.
- Accounts other than grants are only approved on rare occasions under special circumstances.
- All Grant Accounts (S-Dept = RES#) must be approved by the Research Office prior to submission to the Bursar’s Office.
- Payments for Tuition and Fees will affect a student’s financial aid.
- Payment for Tuition and Fees will be posted to the fiscal year based on the term the payment is for.
- Requests should be submitted to the Bursar’s Office at least three days prior to payment due date for the term.
- A department cannot reimburse a student through Accounts Payable for Tuition and Fees.
Tuition and Fees Payment Submission Process

1. Department Completes Request Form
2. Submits to Research Office (Grant Accounts Only)
3. Submit Approved Forms to FAO & Bursar’s Office
4. Bursar’s Office Posts to Student’s Account
5. Financial Aid Office Adjusts Student’s Aid (if necessary)
Request Forms

- Request forms can be found at: http://research.tamucc.edu/forms.html
- Banner Code Set up Request Form
  - Account number changed since previously used
  - First time the account is being used to pay Tuition and Fees
  - This form is used to create the FA Banner Code (Stipends and Scholarships only) and the BO Detail Code-Tuition (3###), Stipends (G###) and Scholarships (S###)
- Scholarship/Fellowship/Stipend Request Form
  - Complete the form each semester
  - This form is used for stipends and scholarships also
Banner Code Set Up Form

Please set up a banner code with the following criteria:

1. **Type of Code/Award:**
   - [ ] Stipends
   - [ ] Scholarships
   - [ ] Tuition/Fee Payment
   *(Check all that apply, codes will be set up for each one checked)*

2. **FAMIS account:**
   - [Account Number] __________
   - [Support Account] __________

   FAMIS account name: ________________________________

3. **Name of Stipend/Scholarship/Tuition:**

   *(max. 24 characters; to be used in setting up and identifying stipend/scholarship in Banner)*

4. **Recipients of Funds:**
   - [ ] Undergraduate Students
   - [ ] Graduate Students
   - [ ] Both

5. **Special Notes (Parking fee only; Tuition only; Fees only; etc.):**

   ___________________________________________________________

   ___________________________________________________________
Scholarship/Fellowship/Stipend Request Form

Page 1

- Section 1 – enter in the Acct #, Acct Name and BO Detail Code (FA Banner Code is for Stipends & Scholarships)
- Section 3 – choose the term the payment is to be applied to
- Section 4 – is for Stipends and Scholarships
- Section 5 – complete if there are special instructions
  - No. of credit Hours
  - Specific Course(s)
Request Form Page 2

- Enter name and student ID for each student
- In Type enter Tuition and Fees
- Enter in the dollar amount that is to be credited to the student’s account

<table>
<thead>
<tr>
<th>Name</th>
<th>Student ID (ex. Axxxxxxx) or Limited Purchase Order No.</th>
<th>Type (participation, tuition, fees, travel, mileage, childcare, etc.)</th>
<th>Amount (numbers only)</th>
</tr>
</thead>
<tbody>
<tr>
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<td>8</td>
<td></td>
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</tr>
</tbody>
</table>
How do I calculate Tuition and Fees?

- Tuition and Fees are broken into different categories
  - Graduate vs. Undergraduate
  - Resident vs. Non-Resident
  - Classification
  - College
- Effective Fall 2014 Undergraduate Resident Students will be placed into Guaranteed Tuition Plans
- Tuition and Fee tables can be found on the Business Office website:
  http://businessoffice.tamucc.edu/tuition_and_fees%20/Tuition_and_Fee_Charts.html
Looking up Tuition and Fees Example:
Fall 2014 Incoming Freshman in College of Business Resident of Texas
**TUITION AND FEE TABLES**

- Use Tuition & Mandatory Fees Column and look up course fees on the online course schedule to add to the total. The final column of Tuition and Fees table is estimated, course specific fees are not included.

- Not Included in the tables
  - International Processing Fee ($75 – Fall/Spring, $37.50 – Summer terms)
  - Course Specific Fees

<table>
<thead>
<tr>
<th>PAYING FOR TUITION ONLY</th>
<th>PAYING FOR TUITION AND FEES</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Statutory</strong></td>
<td><strong>Tuition &amp; Fees</strong></td>
</tr>
<tr>
<td>Hrs</td>
<td>Tuition</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>1</td>
<td>50.00</td>
</tr>
<tr>
<td>2</td>
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<tr>
<td>3</td>
<td>150.00</td>
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<td>7</td>
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<td>8</td>
<td>400.00</td>
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<tr>
<td>9</td>
<td>450.00</td>
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</tbody>
</table>
ACCT 5312.001 – 3 hours graduate rate
- Tuition Only - $684.72
- Tuition and Fees - $1,238.83 + $36 = $1,486.74
6. Banner Posting to FAMIS

✓ How often does Banner post to FAMIS?
✓ What will I see in FAMIS?
✓ How can I get the transaction details?
Banner Transactions and FAMIS

- Transactions are fed to FAMIS
  - Weekly (Monday through Sunday transactions)
  - Month End
- Banner transactions show up in FAMIS as BANNER LOAD
- BANNER LOAD is a summary of the activity from Banner

<table>
<thead>
<tr>
<th>Subcode</th>
<th>TC</th>
<th>Ref1</th>
<th>Ref2</th>
<th>Description</th>
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<th>Batch Date</th>
<th>Batch Ref</th>
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<tbody>
<tr>
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<td>063</td>
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<td></td>
<td>BANNER LOAD</td>
<td>$1,400.00</td>
<td>01/06/2013</td>
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<td>01/31/2013</td>
<td>BNR001</td>
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Grand Total: ($18,125.00)
# ARGOS Report – New Tool for You!

## PDF Version

## WEBBBD Account Detail By Rundate

<table>
<thead>
<tr>
<th>Account Code</th>
<th>Description</th>
<th>Name</th>
<th>ID</th>
<th>Amount</th>
<th>TR</th>
<th>Term</th>
<th>Eff Date</th>
</tr>
</thead>
<tbody>
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<td>245191000000199</td>
<td>Emergency Loan Fee</td>
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<td></td>
<td>(25.00)</td>
<td>CR</td>
<td>201301</td>
<td>1/30/2013</td>
</tr>
<tr>
<td>EFEE</td>
<td>Emergency Loan Fee</td>
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<td>(25.00)</td>
<td>CR</td>
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<td>EFEE</td>
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<td>(25.00)</td>
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<td>(25.00)</td>
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<td>EFEE</td>
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<td>EFEE</td>
<td>Emergency Loan Fee</td>
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<td></td>
<td>(25.00)</td>
<td>CR</td>
<td>201301</td>
<td>1/31/2013</td>
</tr>
</tbody>
</table>

**Run Date 1/31/2013 Totals:**
- **Credits:** $1,400.00
- **Debits:** $25.00
- **Difference:** -$1,375.00

**Grand Totals:**
- **Credits:** $1,400.00
- **Debits:** $25.00
- **Difference:** -$1,375.00
WebBBD is a database of the detailed transactions from Banner.

A department can get the details of a BANNER LOAD through ARGOS.

There are two reports available

- By Run Date(s) and Account Number(s)
- By Term(s) and Account Number(s)
- They are both available to run in PDF or CSV formats
The *Argos Request* form is found on the web (http://banner.tamucc.edu/) under Argos or Degree Planner Account link. Complete the form and submit it to the Bursar’s Office.
Questions?