

2025 Academic Fees Orientation

Wednesday, September 24, 3:00 PM - 4:00 PM, Zoom

Welcome

Agenda

Academic Fees Process

- **Proposals exceeding the growth rate.**
 - Need ABOR approval.
- **Proposals that are within the growth rate.**
 - Need the President's approval. ABOR is notified of the change through the tuition and fee-setting process during the Fall cycle.

Proposals Timeline*

Fall Cycle

*-For academic and mandatory fee changes **within** approved growth rates*

- **July 1:** Proposal deadline – Submit to the University Fees unit.
- **September:** The University Fees Committee reviews and makes recommendations to the UA President.
- **October:** Proposals are submitted to the UA President for review and approval.
- **By November 15:** UA President submits proposed rates to ABOR.
- **By December 15:** Final rates for tuition, fees, housing, and meal plans will be published by the university.
- **By December 31:** ABOR releases official tuition and fee rates for all three state universities.

Spring Cycle

-For new academic fees or changes exceeding approved growth rates

- **December 1:** Proposal deadline – Submit to the University Fees unit.
- **January:** The University Fees Committee evaluates proposals for alignment with student benefits and ABOR policy.
- **February:** New fee proposals or those exceeding the growth rates are due to ABOR.
- **March:** ABOR holds a public tuition workshop and hearing.
- **April:** Final tuition and fee decisions made by ABOR.

***Please note that these dates may be changed at the request of ABOR or senior leadership.**

Dashboard and Year-End Reporting

- **PFDT Dashboard**

UAccess Analytics > Dashboard > Student > Course and Fee Management > Program Fees and Differential Tuition

- Please use this dashboard to manage your GRAD Program Fees and Financial Aid Set-aside (FAS) accounts. If you have any concerns or suggestions, please let us know so we can continue to improve this tool.

- **Year-End Report on Program Fee Revenues**

- You should use a Chrome browser when using UAccess Analytics and remember to connect to the VPN if you are not on campus.
- If the Dashboard slows down, hit HOME and return to the dashboard.
- The dashboard automates the reporting process, and the form will only be required for program fee budget shell codes with high balances and deficits. The threshold percentage used is 85% or less, and the deficit is -10% or greater.
- Reporting data is for all activities posted in FY25, which may include revenue from summer 2024, fall 2024, spring 2025, and part of summer 2025. Summer 2025 fee revenue was disbursed into the accounts in real-time. However, some allocations might occur until the end of September/early October.
- The form data fields are pre-populated with the dashboard information. Please verify the information and attach any supplemental UAccess reports used to correct the amounts (if corrected).
- Student Support populates \$0 as no object code is associated with this expense line. If student support was provided with fee revenue, you must enter this amount manually and change the total to reflect the actual sum, including student support.
- Attach a separate page for the justification for high balances or deficits.
- The narrative box under page 2 should describe how you used the fee revenue to support the fee's purpose and benefit the students who pay it.
- Print the pre-populated form and finish completing it. All signatures are required upon submission. A blank form can be found at the University Fees website.

DEADLINE NOVEMBER 1, 2025

Financial Aid Considerations

Determining Need: $NEED = COA - SAI$ (use zero in place of negative numbers)

UAccess Analytics > Dashboards > Student > Student Fin Aid & Fin Details

- COA - Cost of attendance includes tuition and fees, food and housing, books and supplies, and miscellaneous expenses (this is an estimated value).
- SAI – A federal formula calculates the new Student Aid Index (this replaced the EFC).

Student Awards

UAccess Analytics > Dashboards > Student > Student Fin Aid & Fin Details or PFDT Dashboard

- Using the PFDT Dashboard, you can search by budget shell code. These search criteria are not available on the Student Awards dashboard.
- Loan reduction should be viewed as a positive outcome when awarding scholarships and grants.
- **Notify students of set-aside awards!**

Account Management and Planning

Required Process: FAS Transfers

- Units are responsible for processing FAS transfers (14% of Gross Revenue) periodically:
 - Quarterly
 - Monthly
 - Follow OBP's prior timeline - Spring and Year End
- Here is the [link](#) to instructions on how to process FAS transfers.
- Reminder: Please use sub-object code FAS Object code 0939. This is necessary for reporting.

Cash vs Budget Accounts

- Accounts are generally cash style. The use of budgeted accounts is optional.
- Consider conversion to budget style if your unit needs budget controls & planning visibility.
- Here is a [link](#) to instructions on how to load and manage budgeted accounts.
- Edit account attributes in KFS to convert from budget to cash style or vice versa.

UAccessFinancials -> Chart of Accounts -> Account

The screenshot displays the 'ACCOUNT RESPONSIBILITY' page in UAccessFinancials, comparing 'PREVIOUS' and 'PROPOSED' account attributes. The 'PREVIOUS' column shows the current state, while the 'PROPOSED' column shows the state after a change. A dropdown menu is open for the 'Budget Record Level Code' field, showing options 'C - Consolidation' and 'N - No Budget'. The 'PROPOSED' column has a red box around the dropdown, and the 'PREVIOUS' column has a red box around the 'C - Consolidation' value.

	PREVIOUS	PROPOSED
Fiscal Officer Principal Name:	[Redacted]	* Fiscal Officer Principal Name: [Redacted]
Account Supervisor Principal Name:	[Redacted]	* Account Supervisor Principal Name: [Redacted]
Account Manager Principal Name:	[Redacted]	* Account Manager Principal Name: [Redacted]
Continuation Chart Of Accounts Code:	[Redacted]	Continuation Chart Of Accounts Code: [Redacted]
Continuation Account Number:	[Redacted]	Continuation Account Number: [Redacted]
Income Stream Chart Of Accounts Code:	[Redacted]	Income Stream Chart Of Accounts Code: [Redacted]
Income Stream Account Number:	[Redacted]	Income Stream Account Number: [Redacted]
Budget Record Level Code:	C - Consolidation	* Budget Record Level Code: C - Consolidation
Account Sufficient Funds Code:	N - No Checking	* Account Sufficient Funds Code: C - Consolidation
Transaction Processing Sufficient Funds Check:	No	action Processing Sufficient Funds Check: N - No Budget

Other Accounting Considerations

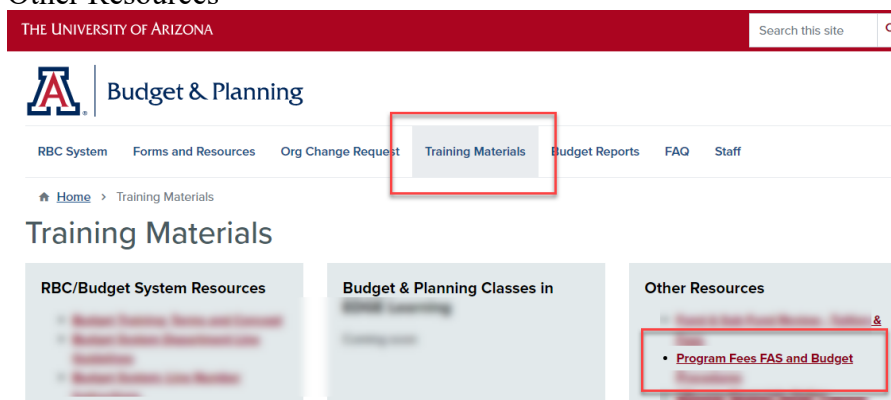
- Revenue will show in the following KFS Object Codes
 - 0097 Program Fee - Graduate
 - 0099 Differential Tuition - Graduate
- PFDT accounts are in the ALCPRG - Allocated Program Fees and Differentials sub-fund. Except for transfers to FAS accounts, **other transfers outside the sub-fund are not allowed.**

Planning in Anaplan

- Forecast cycle:
 - All Funds -> Current Year and Budget Years 1 - 3
 - In-Year Forecast (IYF) -> Current Year
 - Original Budget -> Budget Year 1
- Calendar and training materials available in [SharePoint](#)
- Planning Process overview:
 - Revenues in P&L - Page 8.3
 - Budget account C0100-Program Fees
 - Labor expenses - Pages 8.2.1 - 8.2.3
 - Operating Expenses in P&L - Page 8.3
- Planning for FAS transfers
- All Funds App: use Transfers page 3.1
- IYF and Original Budget apps: plan in P&L - Page 8.3
- Transfer between CRS and FIN planning funds.
- Use budget account C0939-Transfer Internal

Resources

- PFDT account management [guide](#) available on the [OBP website](#) > Training Materials > Other Resources



- Anaplan Resources available in [SharePoint](#)
- For questions, contact your [Assigned Analyst](#)

Things to remember

- The department is responsible for transferring 14% of its revenue from the fee account (2559xx) to the FAS account (279xxx) and awarding eligible students.
- Any other transfers into or out of the fee accounts to other sub-funds are unallowable.
- Awards on fee accounts are restricted unless the fee proposal indicates *student support* as an expenditure and purpose.
- Fee revenue should be expended in the same year it was received. A high balance at year-end suggests the fee is no longer needed or should be reduced.
- Please see the updated [handbook](#) for details and future changes.

Questions & Answers

Contact Information

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