Fee Remissions

Amanda Srichareon, Dina Adkins, Patty Anderson, Milton Flournoy, Lance King, Brian Moellers, Nathan Schroder and John Burgoon

November 14, 2019
What is a fee remission?

A fee remission is any award to a student, regardless of funding source, which provides funding restricted to pay only certain educational expenses assessed by IU.
Project Overview

- Lack of role clarity
- Inconsistent processing
- No policy
These numbers are for the 2018 AY for INSP orgs excluding Bursar, Human Resources, and Financial Aid.
# Metrics

<table>
<thead>
<tr>
<th>Campus</th>
<th># of TPCs</th>
<th># of Special Setup</th>
<th># of TPC Users</th>
<th># of Updates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bloomington</td>
<td>1,001</td>
<td>398</td>
<td>222</td>
<td>5,289</td>
</tr>
<tr>
<td>IUPUI</td>
<td>1,181</td>
<td>81</td>
<td>216</td>
<td>1,326</td>
</tr>
<tr>
<td>Columbus</td>
<td>5</td>
<td>0</td>
<td>106</td>
<td>1</td>
</tr>
<tr>
<td>East</td>
<td>25</td>
<td>5</td>
<td>74</td>
<td>15</td>
</tr>
<tr>
<td>Kokomo</td>
<td>16</td>
<td>3</td>
<td>73</td>
<td>1</td>
</tr>
<tr>
<td>Northwest</td>
<td>12</td>
<td>1</td>
<td>69</td>
<td>4</td>
</tr>
<tr>
<td>South Bend</td>
<td>11</td>
<td>0</td>
<td>74</td>
<td>30</td>
</tr>
<tr>
<td>Southeast</td>
<td>11</td>
<td>1</td>
<td>80</td>
<td>3</td>
</tr>
</tbody>
</table>

These numbers are for the 2018 AY for INSP orgs excluding Bursar, Human Resources, and Financial Aid. Third Party Contract (TPC)
Current State

Fee Remissions – Current State

1. Start
2. Dept contacts Bursar to award fee remission via email
3. Bursar collects needed information to process award via email
4. Does SIS Item type exist per request?
   -Account, Object Code, Charges to pay, SIS Limit, Fiscal Officer, Student IDs
   -Yes
   -No
5. Create SIS Item type using requested account, object code
6. Create TPC using requested charges to pay
7. Does SIS TPC exist per request?
   -Yes
   -No
8. Provide SIS item type and TPC # to department to use in SIS to process award.
9. Does user have access?
   -Yes
   -No
10. Bursar requests user access via DART and sends training materials
11. Dept processes award in SIS via IU Dept TPC Request Page
12. SIS processes request and sends email if requested
   -Award posts in 2 to 3 days after financial aid check
13. Dept may check award in SIS or use IUCR reports to confirm posting
14. Was there an error?
   -Yes
   -No
15. Depts may fix in SIS or contact Bursar for assistance. Award is corrected.
16. SIS monthly accounting feed runs creating FFS entries
17. Dept may reconcile account to confirm awards are still correct
18. Was there an error?
   -Yes
   -No
19. End

Because process is distributed unsure if consistent across depts.

SIS = Student Information System
TPC = Third Party Contract
Future State

Fee Remissions – Future State

1. Start
2. Dept completes Qualtrics form with needed information.
   - Account, Object Code, Charges to pay, SS Limit, Fiscal Officer, Student IDs
   - Dept looks for existing TPC to use
3. Is there existing TPC?
   - Yes
   - Dept processes award in SIS via IU Dept. TPC Request Page
4. Does user have access?
   - Yes
   - Bursar requests user access via DART and sends training materials
   - No
   - SIS processes request and sends email if requested
   - Award posts in 2 to 3 days after financial aid check
5. No
6. Does SIS item type exist per request?
   - Yes
   - Create TPC using requested charges to pay
   - No
   - Dept fixes award and contacts student.
7. Create SIS item type using requested account, object code
8. Provide SIS item type and TPC # to department to use in SIS to process award.
9. End
Standard Operating Procedure

STANDARD OPERATING PROCEDURE

Subject: Fee Remission User and Fiscal Officer's Procedures to Ensure Compliant, Accurate, and Timely Fee Remission Processing
Source: University Bursar
Original Date of Issue: 11/14/2019
Date of Last Revision: 11/14/2019

Rationale: To outline the fee remission user and Fiscal Officer’s responsibility to ensure accurate and timely processing of internal fee remissions.

PROCEDURE

1. The Fee Remission User and Fiscal Officer are responsible for ensuring awards are compliant with the requirements outlined in the Student Payment Guidelines. The guidelines satisfy compliance requirements with federal and state regulations, IU policies and donor intent.
2. The Fee Remission User and Fiscal Officers are responsible for ensuring the accuracy of fee remissions.

Full version available here.
A fee remission is any award to a student, regardless of funding source, which provides funding restricted to pay only certain educational expenses assessed by IU. Fee remissions are applied to approved charges with specific payment rules. All fee remissions for undergraduate and graduate students, regardless of types of remissions, must be processed through the SIS to comply with federal financial aid regulations (regardless of whether the student is receiving federal financial aid).

Use this form to request a fee remission.
Recertification

- User clean-up
- Read and acknowledge SOP to keep access
Questions?

Any Questions?