Tuition & Fee Request Instructions

SUBJECT: Instructions for Submitting a Tuition & Fee Change Request

1. Access request form here: DocuSign
   a. Log in using UHCL system credentials (will require Duo Authentication)

![DocuSign Sign in](image)

b. Once logged in, in the top Menu Options, click on Templates

![DocuSign Templates Menu](image)

c. On the right hand side, the Templates folder menu will appear, click on Shared Folders Tab, choose Planning & Budget Office
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2. The Templates for which you have access to will be listed.

   a. Click USE on the left of the information

3. As soon as the link is clicked on, the “Add recipients” window will appear.

   a. Initiator’s information, this will be whomever is completing the form, after the initiator receives the link, they will be able to enter the details of the request.

   b. Signatures for Unit Head, Division Vice President will follow.

4. Information for the Planning & Budget Office will be auto populated.

5. If any messages need to be added for the signers, you may do so at the bottom of the page
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6. Once all signatories and messages have been added, click on “SEND” at the bottom of the page.

   ![SEND button]

   ADVANCED EDIT SEND

   NOTE: If you are the initiator, then you will see the pop up asking if you would like to begin the signing. Initiate form by clicking on Begin Signing.

   ![Sign Now dialog]

7. The form will be generated to the Initiator, to draft the form, click on “Continue” at the top of the page.

   ![Continue button]

8. The form is now available for data entry, to fill out the form;
   a. Select Fiscal Year for which the fee will begin to be collected from drop down

   ![Select Fiscal Year]

   b. Indicate if this is a New or Existing Fee*

   c. Enter the Tuition, Fee or Charge Name

   d. List the Department and Program Name that owns the Tuition, Fee or Charge.
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**Tuition & Fee Request Instructions**

**New** Existing

Tuition, Fee or Charge Name: ____________________________
Department/Program Name: ____________________________

**e.** Select from the dropdown the Description of the Fee.

**f.** *If Existing is selected, the “Current Rate” section will be a fillable format.

**g.** If “New”, the “Current Rate” will not populate because it does not need to be filled out.

**h.** Enter the “Current Rate and the **Per/Unit** for the individual Tuition/Fee/Charge, followed by “Proposed Rate” and the **Per/Unit**.

<table>
<thead>
<tr>
<th>Tuition/Fee/Charge Detail:</th>
<th>Current Rate:</th>
<th>Proposed Rate:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description: <strong>-- select --</strong></td>
<td>Amount: ________ Per: ________</td>
<td>Amount: ________ Per: <strong>-- select --</strong></td>
</tr>
</tbody>
</table>

**i.** The following section, estimate the Annual Revenue Change that will result from the rate change.

**j.** Enter in the Estimated **Expenditure** Allocation as a result of the Revenue Change in terms of:

i. Salary & Benefits, and proposed FTE

ii. Student Jobs, and proposed FTE

iii. Maintenance & Operations

<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Student Jobs: ________ FTE: ________ M&amp;O: ________</td>
</tr>
</tbody>
</table>

**k.** Next, please include as much detail and information regarding:

i. How does this request benefit the students?

ii. Explain what this request will enhance, solve, or provide for the department or program?
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iii. What are the consequences if this request is not approved?

| How does this request benefit the student? |
| Explain what this request will enhance, solve, or provide for the department or program? |
| What are the consequences if this request is not approved? |

9. Lastly, the following documents must be attached via the link on the lower right-hand side:

a. Current 1063 of revenue cost center utilized for this Tuition/Fee/Charge
b. Other documentation that supports the reason for the change.

When finished, click on Finished button at the bottom of the screen

Once finished, the form will be routed to the individuals who were identified at the beginning of the form creation.

*Note: Everyone that receives the form will have access to make changes, and because once they approve the form it will go to the next individual, we recommend that if there are any changes, they be made prior to submitting the form for final signature as to avoid delays in the approval process.