THE UNIVERSITY OF ARIZONA
Office of the Provost

ACADEMIC FEES

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V3

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01. ACADEMIC FEES OVERVIEW

The University of Arizona assesses additional academic fees, approved by the Arizona Board of Regents (ABOR), to enhance the quality of academic programs.

On February 9, 2023, ABOR adopted a five-year tuition and fee growth framework to improve cost predictability for Arizona residents while supporting enrollment growth, operations, and inflationary needs. Revenues primarily fund strategic and operational priorities for both the universities and ABOR.

Academic Fee changes within approved growth rates are reviewed and approved internally each year. New fees or fee changes that exceed the approved growth rates require ABOR approval. Both types of changes are due by July 1 each year to be presented to ABOR during the fall tuition and fee-setting cycle. Please visit the Curricular Affairs website for a complete list and details of all active academic fees and growth rates.

01. CONTINUED...

ABOR

The Arizona Board of Regents (ABOR) sets tuition and fees for the three Arizona universities. All tuition, mandatory fees, differential tuition, program fees, college fees, and other academic fees must be approved by the board. The policies that govern academic fees are available **here**.

University

The academic fee proposal process begins at the university level and concludes with approval by the Arizona Board of Regents (ABOR). Academic fee changes within approved growth rates are approved internally and reported to ABOR, while new fees or changes that exceed approved growth rates require ABOR approval through the annual tuition and fee-setting process each fall.

Below is an overview of the types of academic fees, the proposal process, and how these fees are managed.

TYPES OF ACADEMIC FEES

- Differential Tuition - Tuition that is higher or lower than the Published Tuition established for each university campus or location and applies to all graduate or undergraduate academic programs in a college or school.

- Program Fees - Additional amounts are charged to students in select singular degree programs within colleges, schools, or departments, including honors colleges or programs that do not fit into the tiered college fee structure.

- College Fees - Additional amounts are charged to students in all graduate or undergraduate academic programs in a college, school, or division. The college fee will reflect additional charges for specific programs with demonstrably higher instructional costs.

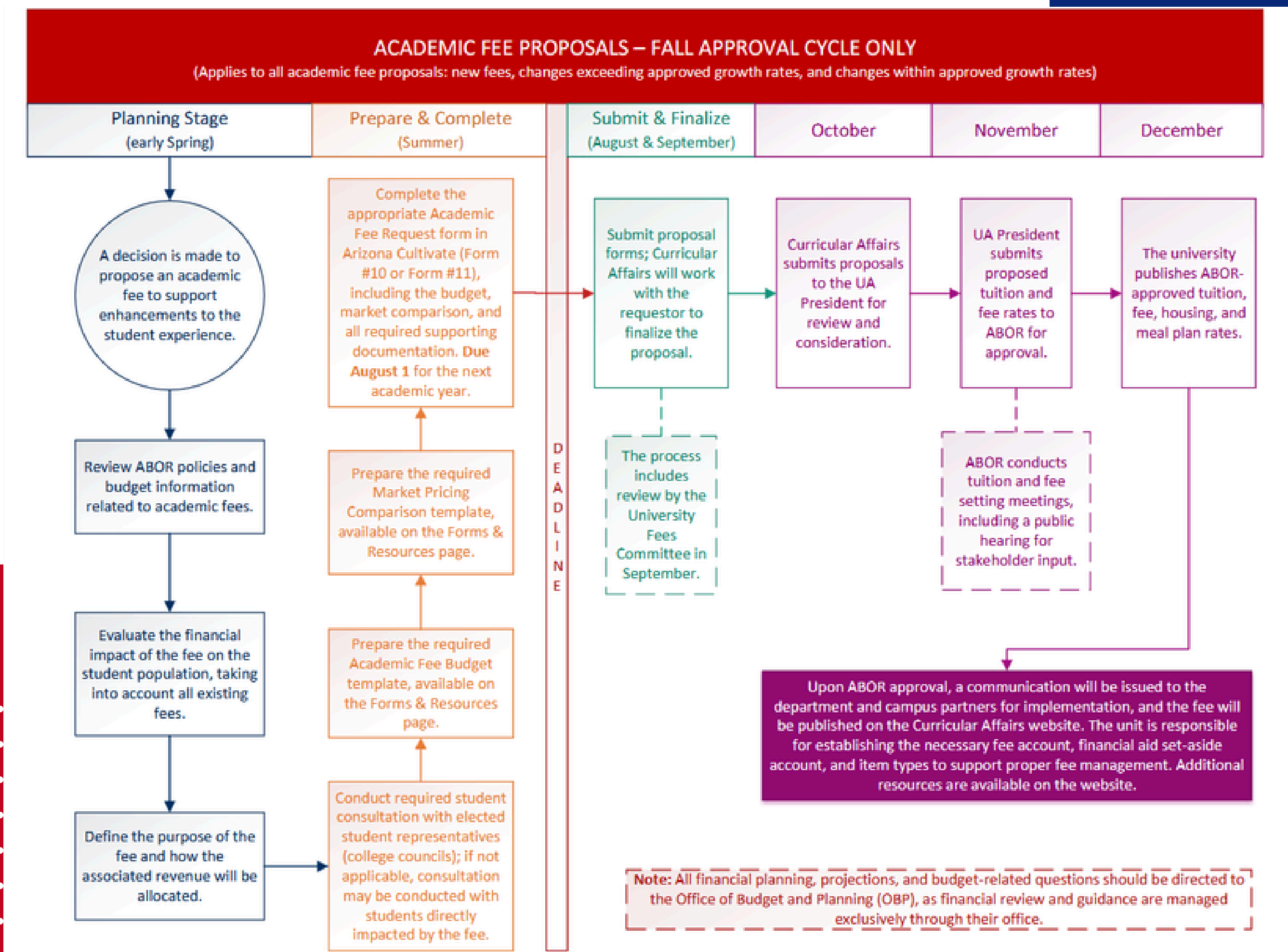
- Mandatory Fees - Fees that are charged to students for a specific purpose, activity, or service. Mandatory Fees can be university-wide or differentiated by campus location, delivery method, enrollment level, or other board-approved criteria. The board must approve all Mandatory Fees.

- Other Academic Fees - These are fees levied by the university due to enrollment, which are additional charges for particular purposes with demonstrably higher costs, such as administrative fees, orientations, penalty charges, etc.

02. PROPOSAL PROCESSES

Tuition combined with a program fee or differential tuition must be equal to or greater than base tuition. At this time, new program fees or differential tuition proposals for undergraduate programs will not be accepted.

Any new proposals or changes to existing fees that exceed ABOR's approved 5% growth rate require formal ABOR approval and follow a separate application. Changes to existing fees that remain within ABOR's approved 5% growth rate may be approved by the University President and follow a separate application. Outlined in Figure 1 below.



(click to enlarge)

Download the appropriate ABOR form (for new or revised proposals) along with the required market analysis and budget templates from the Curricular Affairs website. Be sure to attach these documents as specified in the the corresponding online submission forms.

03. PLANNING STAGE

The planning stage begins when an academic unit identifies a need to enhance the student experience that requires additional funding through an academic fee. When considering a new fee, the unit must determine the proposed amount and carefully assess its potential impact on students. The following factors should be considered when setting the fee amount:

- **Funding required**—The fee amount should generate the necessary amount to fund the enhanced student experience objectives.
- **Market conditions**—The total cost to the student, including the proposed fee, must be competitive and reasonable compared to similar programs at AAUDE and ABOR peer institutions.
- **Growth Rate**— The board approved tuition and fee growth rates for the next five years that reflect a **new multi-year tuition setting structure** to increase cost predictability for resident students at Arizona's public universities.
- **Maximum Fee**— The highest amount, as fixed by the board, at which an academic fee can be set for a given academic year.
- **Other active fees**— Departments and colleges should review any existing fees students are already paying to ensure there is no overlap in purpose with the proposed fee. Additionally, the **University Fees Committee** will evaluate the total cost of attendance (COA) for students before advancing the proposal to the UA President and ABOR.

Completing the Forms

Purpose

Under purpose, provide a brief summary outlining the objective of the fee, including how the revenue will be used and the specific benefits it will offer to students. If the proposal includes a fee increase, clearly explain the additional enhancements or services that the increase will support.

Justification

Under justification, provide a brief explanation of what the proposal will fund and the portion of costs covered by the additional revenue. This section should detail each budget item, including examples of general expense categories such as "operational expenses."

Student Consultation

In accordance with ABOR policy, evidence of student consultation is required for any proposed academic fee. This includes notifying and consulting with elected student representatives. The consultation process must be thoroughly documented, including a description of the methods used, the number of students who participated, and the level of support for the proposed fee.

Completing the Forms

Market Pricing

Market pricing should be based on data from peer institutions. "Peer Institution" refers to a Board-approved list of higher education institutions designated for each Arizona university to serve as benchmarks for evaluating institutional effectiveness. These institutions are selected based on criteria such as size, student demographics, program offerings, mission, and research focus. When completing the market pricing table, it is not necessary to fill in every row. Instead, list relevant institutions in descending order, from highest to lowest cost. If peer institutions do not offer a comparable fee, it is acceptable to include other institutions that do charge a similar fee to provide a meaningful comparison.

Budget Estimate

Please provide estimates for annual revenue and annual expenditures related to your proposal. Break down the expenditures by budget category, such as operating expenses, personnel costs, student support, and any other relevant categories. If additional space is needed for any section, you may attach supplementary pages as required.

04. IMPLEMENTATION

Once a new academic fee is approved, the academic unit is responsible for initiating the necessary setup and procedures to manage the fee appropriately. This includes:

- Creating new accounts in the university's accounting system. (Colleges have the option to set up cash style or budget style accounts).
- Establishing new item types in the student records system
- Developing and implementing business procedures

All academic fees must be tracked and reported separately to comply with academic fee reporting requirements and to ensure proper financial management. Fee revenues and expenditures should not be combined across different programs.

The unit must also establish internal controls and business procedures to ensure accurate tracking, responsible use, and regular monitoring of both revenue and expenses associated with the fee.

Creating a New Account

To comply with Policy 4-105 on Fees, separate accounts must be established in the university's accounting system to track the revenues and expenses associated with each academic fee and Financial Aid Set-aside. These accounts ensure transparency, proper financial management, and accurate reporting.

- Academic Fees: Used to record revenue and related expenditures for each distinct fee. Program fees, including those assessed in summer sessions, should be recorded under sub-fund **ALCPRG**.

- Financial aid set-aside account(s): To track financial aid set-aside, a separate account must be established for each unique program fee or differential tuition.

Additional accounts may be necessary depending on the specifics of your proposal.

Please refer to the Finance and Budget webpage for detailed guidance on opening, updating, or closing accounts.

Creating New Item Types

The university's student records system uses item types to manage billing and financial aid transactions. Separate item types are required for program fees, differential tuition, and the associated financial aid set-aside. Item types cannot be created until the corresponding accounts have been established.

For summer and winter sessions, separate item types and fund accounts are required for both tuition charges and financial aid awards.

To request new item types:

- Bursar Item Type Proposal: Use this form to request an item type associated with the academic fee or tuition charge.

- Financial Aid Item Type Request: Use this form to request an item type for awarding aid from the financial aid set-aside account.

    - Note: If you want the set-aside aid to apply only to specific charges, please indicate this in your request. Otherwise, the item type will be set up to pay all charges by default, and any excess will be refunded to the student.

Creating New Sub-Object Codes

To ensure transparency and accurate reporting, FAS sub-object codes must be established for each account using object codes **0930** or **0939**. These sub-object codes are essential for tracking financial aid set-aside activity in alignment with university reporting and compliance requirements.

05. FINANCIAL AID SET-ASIDE

Following Arizona Board of Regents (ABOR) Policy 4-321, each university must set aside a portion of program fee and differential tuition revenue to support students with demonstrated financial need, with priority given to undergraduate Arizona residents. The current ABOR-mandated set-aside rate is 14%. These funds may be used to help cover tuition, fees, and other university charges.

As of Fiscal Year 2025, under the new college fee model:

- The Office of Scholarships and Financial Aid (OSFA) now manages all undergraduate Financial Aid Set-Aside (FAS) funds, with the exception of the Honors College Fee.
- The Office of Budget and Planning (OBP) no longer processes FAS transfers on behalf of academic units. Academic units are now responsible for initiating and processing their own FAS transfers for graduate program fees.
- Units are also responsible for managing over- and under-set-aside FAS adjustments and conducting periodic budget reconciliations in alignment with OBP's recommended timeline, including spring and year-end reviews.

For additional guidance and resources related to departmental awarding, please visit: https://financialaid.arizona.edu/faculty-staff/stipends.

DOCUMENTATION OF AWARD PROCESS

Academic departments that charge program fees or differential tuition are required to establish and document a fair, transparent, and consistent financial aid distribution process. This process must adhere to applicable ABOR policies, university regulations, and, where relevant, college-specific guidelines. When designing your distribution of financial aid process, please consider the following key factors:

- Students are required to complete the Federal Student Aid (FAFSA) application, which determines their eligibility and amount of need-based financial aid.
- Compliance with the **Family Educational Rights and Privacy Act of 1974** (FERPA) and **UITS Security Policy and Guidance** is essential.
- International students enrolled in master's or doctoral programs should submit the Financial Aid Calculation Form to the OSFA only after receiving a need-based fellowship award. Detailed instructions and the required form are available on the OSFA **website**.
- To uphold sound business practices and ensure internal controls, the selection of financial aid recipients and the processing of awards should be carried out by different individuals. Units with limited staff who are unable to separate these responsibilities should consult with their college business office to implement appropriate oversight measures.
- The process may involve distributing aid evenly among eligible students, allocating based on unmet need, or requiring an additional application.
- The unmet need calculation accounts for other aid a student receives. Awards will not be disbursed if total aid exceeds the student's demonstrated need. For questions, don't hesitate to get in touch with the **OSFA**.

AWARDING FAS

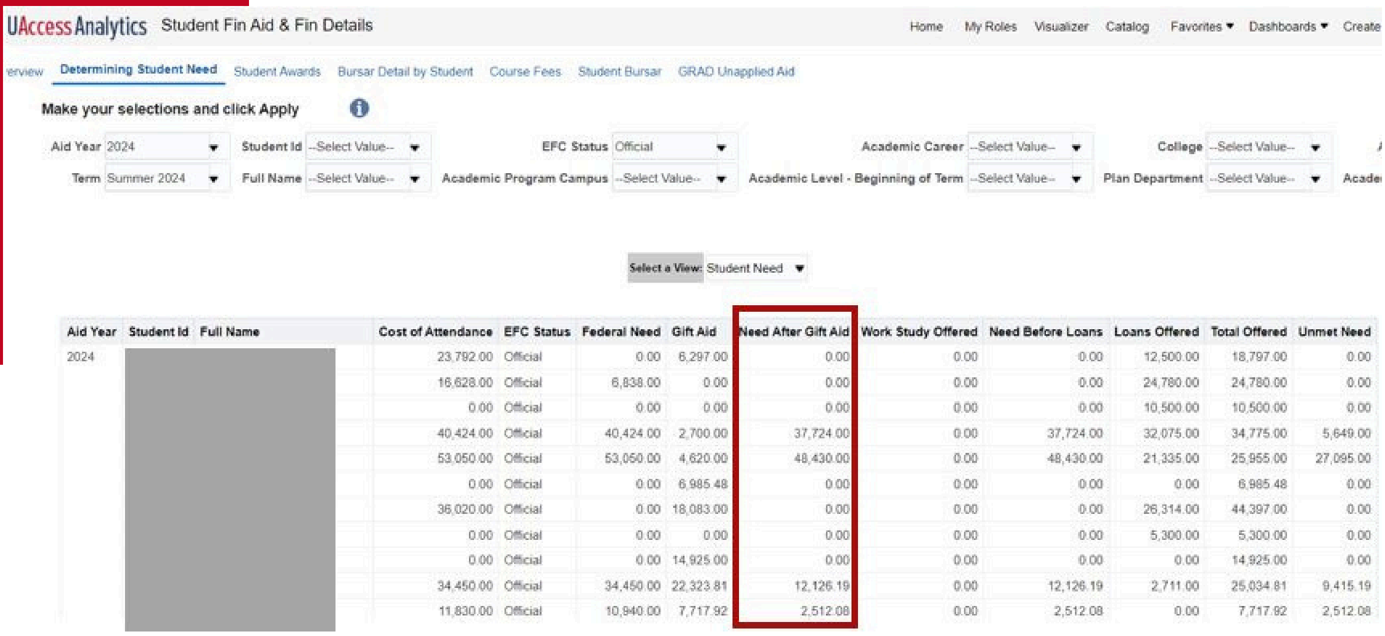
Departments should submit FAS awards through the UAccess Student External Awards module at least **3–4 weeks prior to the start of the term** to ensure timely disbursement and allow adequate time to resolve any conflicts with other aid.

To enter or approve awards, staff must request appropriate access through the **UAccess Access Provisioning Tool**. Completion of the required training—*UAccess Student: Financial Aid External Awards for Departments*—is available via EDGE Learning.

Departments are responsible for following the established process to identify eligible students, which includes verifying:

- Enrollment in a program is assessed with the applicable fee.
- Demonstrated financial need based on a current FAFSA.

A report to identify students eligible for need-based awards is available in UAccess Analytics:
UAccess Analytics > Dashboards > Student > Student Fin Aid & Fin Details > Determining Student Need



Aid Year	Student Id	Full Name	Cost of Attendance	EFC Status	Federal Need	Gift Aid	Need After Gift Aid	Work Study Offered	Need Before Loans	Loans Offered	Total Offered	Unmet Need
2024			23,792.00	Official	0.00	6,297.00	0.00	0.00	0.00	12,500.00	18,797.00	0.00
			16,628.00	Official	6,838.00	0.00	0.00	0.00	0.00	24,780.00	24,780.00	0.00
			0.00	Official	0.00	0.00	0.00	0.00	0.00	10,500.00	10,500.00	0.00
			40,424.00	Official	40,424.00	2,700.00	37,724.00	0.00	37,724.00	32,075.00	34,775.00	5,649.00
			53,050.00	Official	53,050.00	4,620.00	48,430.00	0.00	48,430.00	21,335.00	25,955.00	27,095.00
			0.00	Official	0.00	6,985.48	0.00	0.00	0.00	0.00	6,985.48	0.00
			36,020.00	Official	0.00	18,083.00	0.00	0.00	0.00	26,314.00	44,397.00	0.00
			0.00	Official	0.00	0.00	0.00	0.00	0.00	5,300.00	5,300.00	0.00
			0.00	Official	0.00	14,925.00	0.00	0.00	0.00	0.00	14,925.00	0.00
			34,450.00	Official	34,450.00	22,323.81	12,126.19	0.00	12,126.19	2,711.00	25,034.81	9,415.19
			11,830.00	Official	10,940.00	7,717.92	2,512.08	0.00	2,512.08	0.00	7,717.92	2,512.08

Check the “Need after gift aid” column to ensure awards do not result in over-awards. If an over-award occurs, other aid types, such as loans, may be adjusted to allow gift aid to disburse.

Please allow up to two weeks for account reviews. If the award hasn't been disbursed after this period, please contact OSFA for help.

MONITORING & MANAGING FAS

To remain in compliance with ABOR and University policies, units must ensure that all available financial aid is awarded by the end of the fiscal year, without exceeding the allocated funding. Ongoing review and monitoring of account activity and balances throughout the year are essential for accurate and compliant financial management.

A report to track the status of processed awards is available in UAccess Analytics:
UAccess Analytics → Dashboards → Student → Student Fin Aid & Fin Details → Student Awards

To effectively monitor disbursements, enter your account information and apply the appropriate filters to view awarded students.

Financial Aid Summary by Account Org

Aid Year	Account College	Account Organization	Term	Item Type Id	Item Type	Disbursement Plan	Disbursement Plan ID	Account Number	Object Code	Financial Aid Type	Aid Source	Need Based	Award Status	Offer Amount	Accept Amount	Authorized Amount	Disbursed Amount
2024	[redacted]					EA	02	[redacted]	6540	Grant	State	Y	Accepted	70,336.00	70,336.00	65,736.00	65,736.00
														70,336.00	70,336.00	65,736.00	65,736.00
														70,336.00	70,336.00	65,736.00	65,736.00
Grand Total														70,336.00	70,336.00	65,736.00	65,736.00

Analyze - Refresh - Print - Export

- If all eligible students have been awarded but the required 14% of revenue has not yet been met, the college or department may increase awards for the neediest students, provided the total does not exceed their unmet need after gift aid.

- If there are insufficient needy students to allocate the full amount, units can collaborate with OSFA to award students who have paid the fee but do not demonstrate financial need.

- The goal is to fully distribute the required financial aid for the fiscal year, including any available beginning balance. As part of the Year-End Review established by OBP, units may be required to report their beginning balance, current set-aside amount, funds distributed, and remaining balance.

- Charge priorities determine which Bursar charges are covered by financial aid disbursements. These priorities, along with payment priorities, guide how aid is applied to charges. Common charge priorities include:
  - TUITION: Covers base tuition, differential tuition, and program fees
  - TUITFEES: Covers base tuition, differential tuition/program fees, and mandatory fees
  - TITLE IV: Covers charges approved by the Department of Education (or all charges if the student has completed a waiver)
  - ALL: Covers any Bursar charge

06. ANNUAL YEAR-END REPORTING

Annual Year-End Reporting for Program Fees and Differential Tuition (PFDT), including the review of significant remaining balances, has transitioned to the Office of Budget and Planning (OBP).

OBP is now responsible for the financial oversight, monitoring, and compliance of academic fee revenues. **A new year-end review process has not yet been established; OBP is currently evaluating the process and exploring options to align it with its budget planning cycles.**

Curricular Affairs no longer manages Year-End Reporting or any financial oversight or compliance processes related to academic fees. Curricular Affairs continues to manage the academic fee proposal and approval process.

Departments remain responsible for ensuring that fee revenues are used in accordance with approved proposals and applicable ABOR requirements and for maintaining accurate, auditable records.

07. DELETING OR REDUCING FEES

If a college or department determines that a fee should be reduced or discontinued, a proposal must be submitted to curricular affairs. The Arizona Board of Regents (ABOR) will be notified of the change during the fall term's Tuition and Fees setting process.

Proposals can be submitted online via Arizona Cultivate. Visit the Forms and Resources site to access the *Academic Fee Reduction or Removal Request*.

Once approved, funds already collected must continue to be used exclusively for their approved initially purpose. The associated account should remain open to receive any late payments from students, ensuring proper allocation of those funds.

08. CHANGES SUMMARY

- **Annual Year-End Reporting and Financial Oversight**
  - Annual Year-End Reporting for Program Fees and Differential Tuition (PFDT) has transitioned to the Office of Budget and Planning (OBP), which now oversees the financial monitoring and compliance of these funds. OBP is currently developing a new review process, potentially aligned with its budget planning cycles, while Curricular Affairs continues to manage the academic fee proposal and approval process.

- **UGRAD FAS Monitoring:**
  - Undergraduate FAS balances are now transferred to the Office of Scholarships and Financial Aid (OSFA), which centrally manages undergraduate FAS awarding. Accordingly, Curricular Affairs no longer conducts year-end reviews of undergraduate FAS.

- **GRAD FAS Monitoring:**
  - At year-end, OBP administration will review graduate-level FAS to ensure compliance with the 14% minimum allocation and awarding requirement.
  - Units are responsible for initiating and processing all FAS allocations.
    - Guidance on FAS assessment and budgeting can be found here.

08. CONTINUED...

- **Academic Fee Approval Timelines:**
  - Fee changes within approved growth rates are approved internally and reported to ABOR, while new fees or changes that exceed approved growth rates require ABOR approval through the annual tuition and fee-setting process each fall.

- **Budget and Adjustment Responsibilities:**
  - Units are responsible for managing over/under FAS balances and performing periodic budget adjustments, typically during spring and year-end, aligned with the Office of Budget and Planning (OBP) recommended timelines.
  - As of FY25, the OBP no longer loads or maintains revenue budgets for Program Fee and Differential Tuition (PFDT) accounts. Budgeting for these accounts is now optional and fully managed by the units.

- **Other Budgeting and Coding Changes (Effective FY25):**
  - Strategic Budget Allocation (SBA) is no longer assessed.
  - Object Codes (OC) 0938, 7938, 7939, and 7930 have been deactivated. Per the new guidelines, only OC 0930 and 0939 should be used going forward.

09. CONTACTS

The following individuals are vital support for the collaboration, proposal, implementation, and management of academic fees.

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Helpful Websites:

Curricular Affairs

Office of Budget and Planning

Office of Scholarships and Financial Aid

Financial Services

Bursars Office