## WHAT IS THE FEE PORTAL?

The fee portal is a method for gathering information regarding new fees from departments that are not included on the official Board of Trustees resolution, and to obtain appropriate approvals for charging fees to students.

## WHY IS IT NECESSARY?

Utilizing the portal ensures that students are billed accurately and timely, a formal approval process is in place for all fees charged to a student account, 1098-T tax forms are accurate for IRS compliance, departmental revenue accounts are properly credited, and provides information for students to make informed decisions.

## SUBMITTING FEES FOR APPROVAL

In order to assess a new fee to students, information about the fee must be submitted to Student Financial Services using the Wake Forest Fee Portal. The fee portal is a Google form.

The fee portal should be utilized by all schools (Undergraduate College, Law, School of Business, School of Divinity, and Graduate) to request that fees be assessed for the following:

- Course fees associated with a particular Course Reference Number (CRN)

- Fees associated with a particular location, such as a study abroad or domestic trip

- Fees associated with a school or program
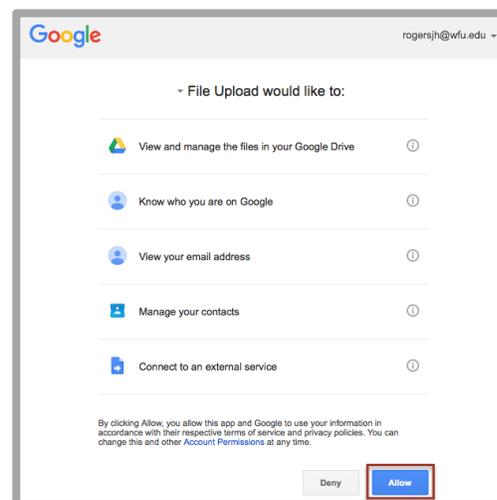
## HELPFUL INFORMATION

In order to complete the information requested in the fee portal efficiently, here are some pieces of information you will need to have handy:

- A detailed description of the fee including why the fee needs to be billed to students

- A short fee description (30 characters) that will display on the student bill

- Course specific fees:
    - CRNs
    - Subject codes
    - Course codes

- General fees:
    - Location where student will be studying
    - Program of study

- Global Programs and Studies/Study Abroad fees:
    - Workday accounting information for collecting fees

- Travel-Based Courses:
    - Completed Travel Budget Form

## UPLOADING FILES

- When uploading your completed form, Google will ask you to "Review Permissions". Click the button, and simply click "allow" when the pop-up dialog box displays.

- After clicking "allow", you will have the option of choosing your file to upload.



## RELATED POLICIES AND RESOURCES

- **Fee Portal Procedure:**

    https://prod.wp.cdn.aws.wfu.edu/sites/141/2018/03/Fee-Portal-Procedures-.pdf

- **Fee Portal:**

    http://go.wfu.edu/sfsfeeportal

- **Travel Budget Form for Travel-Based Courses:**

    http://go.wfu.edu/sfsbudgetupload

## FEE ASSESSMENT TIMELINE



**Summer Semester** (All Parts)
- Portal Open (11/1 – 3/1) Approvals (3/2 – 3/15)
- 3/30 - 4/15
- Data Processed/ Fees Built
- Reg-Bill (due6/1)
- Portal Open (11/1 – 3/1) Approvals (3/2 – 3/15)

**Spring Semester**
- Portal Open (7/1 – 8/15) Approvals (8/15 – 8/30)
- Data Processed/ Fees built (9/1 – 10/15)
- Reg-Bill (due 12/1)

**Fall Semester**
- Portal Open (1/1 – 3/15) Approvals (3/16 – 3/30)
- Data Processed/ Fees Built (4/1 – 5/15)
- Pre-Bill
- Reg-Bill (due 8/1)

January | February | March | April | May | June | July | August | September | October | November | December