

Instructions page

1. Tips for making a fee request:

A. Be prepared with the information that will be required of you.

B. What you will need to know/have:

- A description of the charge you are requesting;
- The FOAPAL that will be credited;
- Who is the population to be charged;
- Supporting information such as a budget detailing expenses;
- How you expect the fee to be charged – is it attached to a course, charged to all students in a particular department or program or independent of course registration?
- For which term do you expect the fee to be implemented;

C. Start the process early so that there is enough time prior to a term beginning to obtain approval.

2. Before filling out this form, SAVE it to your computer and then open it in Adobe Reader. This will ensure that no data is lost.
3. Once you have completed the form, you will need to print it to obtain the required signatures.
4. Please scan the form once the signatures are obtained.
5. Ensure that the scanned version is attached to your email along with any other documents, such as excel budget spreadsheets or word documents describing more fully the rationale for the charge.
6. Completed and signed form must be emailed to mary.mccullogh@mcgill.ca and cc:ed to fees.finserv@mcgill.ca. Please note that hand written forms are not allowed and will be rejected.

Please read the [Appendices](#) regarding the nature of fees as well as guidelines.

PART 1:
Date of Request:
Name of Department/Unit:
Name of Requestor:
Title:
Email Address:
McGill Telephone number:

Part 2:
Please refer to Appendix A and B.
<p>A. This is a new Request for a Fee</p> <p>B. This is a Request for a Fee Adjustment</p> <p>C. This is a Request for the Elimination of a Fee</p>
Relates to a Fee in: Category I Category II Category III (See Appendix A for descriptions of categories)
Name of Fee:
Fee Code: (required for B and C above)
Description of Fee: (may be posted on public website with French translation to be provided if approved by FAC)
Current Amount (for B):
New Amount (for A and B):
Rationale for new fee or for the adjustment of an existing fee:

To which Student Group would the fee apply? (eg. Undergraduates/Graduates/ Post-docs/School of Continuing Studies/Macdonald College/all/specialized group to be specified)

Nature of fee (check all that apply)

a) Program Fee

b) Course fee

i) Applicable to:

- all sections of course
- only individual sections of course

ii) Refundable:

yes, fee can be automatically refunded during the course add/drop period

yes, but fee should not be automatically refunded during the course add/drop period (provide instructions on the circumstances for refunding)

No

iii) Course is:

Complete the following details:

Course Subject:

Course number:

CRN (if known):

Term(s) offered:

c) Fine or penalty

d) Disposable materials that are one-time use (eg. Testing materials)

e) Purchased items to be kept by student

f) Field trips

g) Other, please specify: _____

Suggested Date or Term of Implementation:

Can students opt-out of charge: YES NO

FOAPAL:	Fund	Orgn	Account	Program	Activity	Location
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Budget Information Requirement

A detailed budget must be submitted along with this request, based on the actual cost for the materials, supplies, services or use of off-site facilities. You must attach the budget (may be in excel or word) to the email that results from this form submission. The Fee Advisory Committee reserves the right to request a financial statement at the end of the term in which the activity occurred.

The budget is submitted

Additional Information

Comments:

Additional supporting documents (such as emails of support or explanation, consultative efforts with groups affected, etc. should be attached to the email when this form is submitted)

Part 3:

Support from Academic or Administration Head : (see appendix B for information on required approvals)

Signature of requestor:

Date

Signature of Chair (if req'd):

Date:

Signature of Dean (if req'd):

Date:

Part IV: Decision (for office use only)		
Approved	Declined	Document Number:
Dates Reviewed by Committee: 1. 2. 3. 4. 5.		
SFAC reasons/Comments: 		
Conditions: 		
Date of Implementation: 		
Date of Notification: 		

APPENDIX A

GENERAL FEE DESCRIPTIONS

DESCRIPTION	EXAMPLES OF FEES	PROCESS
CATEGORY I University-wide mandatory fees, other than tuition fees, that must be paid to apply to, enroll in, or attend the university.	Includes: <ul style="list-style-type: none"> • Application Fee • Registration Charge • Information Technology Charge • Transcript and Diploma Charge • Copyright Fee • Athletics and Recreational Fee • Student Services Fee • Writing Center Fee • General Administrative Charge • Additional Session Fees • Non-thesis Extension Fees 	Modifications are made annually in accordance with MESRST directives and/or the Ancillary Fees Agreement
CATEGORY II Service Fees and Fines	Includes: <ul style="list-style-type: none"> • Late registration fee • Library fines • Fee for re-reads • Fee for dishonored payments • Late payment fees • ID card replacement fee 	The Deputy Provost SLL or and/or the Vice-Principal (Administration & Finance) will make a recommendation and will bring the changes for consideration by the Fee Advisory Committee.
CATEGORY III Faculty-, course- or program-related fees collected for materials, supplies, services or use of facilities used in concert with or in direct support of the academic course offering.	Includes: <ul style="list-style-type: none"> • fees collected for course-based materials, services or use of facilities • fees for program-based badges, and lab coats and instruments that the student keep for future use • fees for courses that require field trips or travel off campus • accommodation, admission fee to off-site facilities 	Any modification to the existing fees, or a request for a new Faculty or program-related fee, shall be submitted in writing for consideration by the Fee Advisory Committee.
CATEGORY IV Students' Associations and	Fees collected on behalf of recognized students' associations/groups/activities	Subject to referendum of their members conducted by the student association and student

<p>Student Society Fees</p> <p><u>University level:</u> SSMU, PGSS, MACES, MCSS</p> <p><u>Faculty level:</u> AUS, DSS, EdUS, EUS, LSA, MUS, MSS, MUSA, SUS</p> <p><u>Student Activities:</u> McGill Daily, Tribune, LICM, CKUT and QPIRG</p>	<p>pursuant to their Memorandum of Agreement with McGill University.</p> <p>Includes</p> <ul style="list-style-type: none"> • membership fees, fees to support student association and student society operation, service, groups or clubs, • fees in support of a designated University activity or service (e.g. library support, computer services) <p>Although collected by the University these are placed either in a trust account for the student association's use or, by agreement, placed into internal account for the designated use at the University (e.g. library fund).</p>	<p>society in accordance with their Constitution and/or by-laws and subject to the conditions set out in the Memorandum of Agreement with McGill University.</p>
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APPENDIX B

GUIDELINES FOR ESTABLISHING OR ADJUSTING FEES IN CATEGORY I, II OR III

A. General Provisions

1. University Units, Departments and Faculties seeking to establish or adjust a compulsory student fee shall submit a written request to the Student Fee Advisory Committee (SFAC) for consideration.
2. The **SFAC** shall review the request, giving consideration to the rationale for establishing or adjusting the fees in Category I, II or III.
3. On conclusion of their review, the **SFAC** shall advise the Provost on the proposed fee and their recommended action.
4. At any time during the review, the **SFAC** may request additional information prior to making a recommendation and may set conditions for approval.

B. Process to request a new fee or a modification to an existing fee

A request shall be made in written form by the Unit responsible for the fee.

Units shall make their request by using the form devised for that purpose, and shall provide full details supporting the new fee or a modification to an existing fee.

The SFAC shall consider the unit's submission, including the need for the fees, the proposed budget and previous financial statements relevant to the fees as well as the interests of the units, the students and the University.

SFAC shall ensure that the fees are real, reasonable and justifiable.

C. Specific Provisions for Approval of Category III Fees

Faculty-, course- or program-related fees are collected for required materials, services or use of facilities used in concert with the basic complement of supplies and services needed for the delivery of the instruction. Those fees can only be charged for required materials, services or use of facilities not covered by the MESRST grant.

1. The fees are required for materials or services specific to the course or program. The students cannot opt out of utilizing the required materials or service, and the required materials or services are not available to the students through alternative means.

2. The fees charged reflect only actual costs and are expended in the year in which they are collected. If costs are adjusted, and there are unexpended balances at the end of the course or program, the refund shall be issued to the students who have paid the fee. For future years, the fee may be reduced, suspended or eliminated, as appropriate.

Criteria for determining a **Category III** fee:

- Fees charged can only reflect actual costs. Administrative charges and inflationary factors cannot be added to the fee.
- Fees cannot include, or be directed to the cost for teaching staff, or serve as additional tuition or permanent base budget allocations.
- Fee cannot be charged for the basic complement of classroom supplies and materials required for instruction. These include but are not limited to: chalk, erasers, classroom instructional equipment such as projectors (slide, overhead, computer, etc.) and associated supplies (bulbs, transparencies, software, etc.), or any other supplies deemed necessary to equip the instructional space for the course.
- Fee cannot be charged for the basic complement of laboratory supplies and instructional equipment necessary for classroom lab requirements identified in the course description. These include but are not limited to equipment, test tubes, work stations and computers, or any supplies necessary to equip a laboratory space or office to complement classroom course instruction.
- Fee cannot be charged to fund the construction or renovation projects.