

# Department Agreement to Fund Instructions

## ➤ Process Summary

Departments wishing to fund all or a portion of a student's tuition and fees may do so by submitting an electronic Agreement to Fund form to the Office of Student Accounts. The form describes the details of the semester, students, reasons for covering tuition/fees/insurance, and how they will be paid for. The eForm is automatically routed for review, approval and posting into the student's account and SAP accounting system.

Effective January 2021: The electronic Agreement to Fund form permanently replaces all prior paper or Excel forms.

To access the eForm, select the *Department Agreement to Fund* eForm at: <https://studentaccounts.unl.edu/forms>

**This link must always be used to access the form. Do not save a blank form for future use.**

There are three people or areas involved in this process:

- The **Requestor/Completer** completes the Agreement to Fund e-form and selects the Approvers.
- Financial **Approvers** ensure that each transaction is correct and has the correct funding source approved for use.
- The **Student Accounts Office** addresses questions and issues related to compliance and then posts the charges.

### Contacts for Questions

Questions about a specific student or situation: Caroline Knuth, Grad Studies, 402-472-8670 [caroline.knuth@unl.edu](mailto:caroline.knuth@unl.edu)

Questions about form use or the Frevvo system: Trudy Rhoads, Student Accounts, 402-472-9006 [trhoads1@unl.edu](mailto:trhoads1@unl.edu)

## Requestor/Completer Process

### ➤ Complete the Agreement to Fund Form

The form may be completed by:

- A Completer – the person who enters information into the form on behalf of the Department
- A Requestor – the faculty member or other Department member who is requesting tuition and fees funding coverage for a student

#### 1. Access and complete the Agreement to Fund form

To access the eForm, go to <https://studentaccounts.unl.edu/forms> and select the *Department Agreement to Fund* eForm from the menu on the left of your screen.

- The Requestor will be required to log into the MyRed Dashboard with their NUID. This allows the form to auto-populate some fields.
- As you enter information in fields that have drop down boxes, you may begin typing and then click on the correct item when it appears. This will to auto-complete the field.

**Save for Later:** If while completing the form you need to check information or finish the form later, click the "Save for Later" button found at the bottom of the form. The form will be stored in your Business Central "My Tasks" at <https://businesscentral.unl.edu>. To reopen and continue processing the form, click on the red side arrow. ▶

### Form Information Fields

#### Term

Indicate to which academic term the funding should be applied. Please note, the December 3-week session was coded as Fall 2020 (1208) and the January 3-week session is coded as Spring 2021 (1211).

#### Payment

**Cost Object/WBS** - Review the funding source to ensure there are no restrictions on the account. For example, if SAP shows a CO/WBS as Tuition Only, the department may not use it to cover fees.

**Payment Options** – Select one of the three radio button options:

**One Time Only** – for situations that will occur once, and you don't plan to use the CO/WBS again;

**Change CO/WBS on existing Agreement;** or

**Neither/NA** – for all other situations in which the CO/WBS will be used repeatedly for multiple Agreements

**GL #** - Select the appropriate GL from the dropdown list. GL number 562200 is used most frequently.

## Form Information Fields

### Required Payment Info.

**Explanation of Coverage** - Explain WHY the department wants to pay the tuition/fees for the student(s). (Do not enter “what to pay” since dollar amounts are entered below.)

### Students

Select the radio button option that describes the action you want to take:

**New Agreement** – to initiate a new Agreement

**Addition to Previous Agreement** – to increase coverage provided by a previous Agreement

**Overrides Previous Agreement** – to cancel the terms of an existing Agreement and provide new coverage

**Student NUID** – Enter the student NUID number, not the Payroll ID number.

**Student Name** – This field will auto-populate based on the NUID.

### Tuition, Mandatory Fees and Insurance

**You must complete each field.** Enter dollars using the \$ sign, percentage using the % sign OR identify the number of credit hours you wish to cover.

**Mandatory Fees** – Mandatory fees include: UPFF, Library Fee, Technology Fee, Registration Fee, N-Card Fee and Course Fees. Coverage of any other fees must be pre-approved by the Student Accounts Director.

**Insurance** – The Department may only cover up to 79% of the insurance. The student must pay the remaining 21%.

## 2. Assign approvers

After completing the form, you need to assign approvers by searching then selecting the approver’s name from the search results.

### Importance of Search and Select

As you begin typing the approver’s last name in the search field, a list of search results will present options from which to choose. To continue to narrow the number of choices, type a comma and the approver’s first name. For the form to route correctly, you MUST choose from the presented options. If the name was correctly selected from searched results, the Approver’s name will appear with their NUID. If the Approver’s ID doesn’t appear with their name, the name was not selected from the results – erase and reenter by selecting from the search results.

## 3. Submit form

After completing the form and assigning approvers, click the SUBMIT button to auto-route the form to the assigned approver.

### Special Approvals

If the form is submitted after the deadline published by Student Accounts, an additional approval is auto-routed to the Associate Vice Chancellor of Business and Finance. There may be other uncommon or complex situations that require similar special approvals. After the special approval is obtained, the form will be routed to the Department Approver.

## 4. Complete another form

If you wish to complete another form after submitting the prior form, you may click the refresh icon on your browser to get a new blank form.



**Next: Approver takes action on eForm received from Requestor/Completer**

 At this point: The Requestor has completed and submitted the form for approval.

## Department & Dean's Office Approver Process

### ➤ Review and Approve Agreement to Fund

The form must be approved by:

- Department Approver, as assigned by the Completer
- Dean's Office Approver, as assigned by the Completer

#### 1. Review email notification

Workflow is built into the form. When the Requestor/Completer completes and submits the form, you will receive an email from **Business Central** <[no-reply@frevvo.com](mailto:no-reply@frevvo.com)> indicating the form is waiting for your review. A link to the completed Agreement to Fund eForm is included in the email. If you do not take action within 2 days, a reminder will be emailed to you.

Add "Business Central" to Safe Senders list

All emails will be sent from **Business Central** <[no-reply@frevvo.com](mailto:no-reply@frevvo.com)> Please add this email to your SAFE SENDERS list so that the notifications do not end up in your SPAM folder.

#### 2. Review and Approve Agreement to Fund e-Form

##### a. Verify Cost Object/WBS and GL

Make sure that each Cost Object/WBS is a correct number and that it allows coverage of the charges.  
Review the assigned GL.

##### b. Verify items paid

Verify the item and amount identified for each student should be covered as shown.

##### c. Submit for changes, if needed

If the form needs corrections or changes, click on the "**Send Back for Changes**" button. Select the Completer and describe the need for changes in the text box, then click the **Submit** button.

##### d. Approve

Submit your approval by clicking the **Sign this Section** and the **Approve** button at the bottom of the form.  
Note: After both Approvers have submitted their approval, the system auto-sends an email to Student Accounts notifying that the form is ready for review and entry. At the end of the process, a pdf of the completed form will be emailed to the Completer and Approvers letting them know the process has been finished.

**Save for Later:** If while completing the form you need to check information or finish the form later, click the "Save for Later" button found at the bottom of the form. The form will be stored in your Business Central "My Tasks" at <https://businesscentral.unl.edu>. To reopen and continue processing the form, click on the red side arrow. ▶

 Next: Student Accounts takes action on eForm received from Approver

#### **A Note for All Roles: Business Central & Frevvo**

Business Central provides many guides for using and tracking Frevvo electronic forms.

**Go to: [businesscentral.unl.edu](https://businesscentral.unl.edu) Select the "Business Process Resources" tab**

Under the header "Using Online Forms (Frevvo)," these guides may be helpful to you:

- [How to Use Online Forms in Frevvo](#) – An introduction to using forms in Frevvo
- [Using Audit Trail in Frevvo](#) – Instructions for acting on Frevvo forms and tracking them through routing and completion



At this point: The Requestor submitted the form and the Department and Dean's Office Approvers have approved it.

## Student Accounts Review & Posting

### ➤ Review and Post Agreement to Fund

Upon receiving the Agreement to Fund form, Student Accounts reviews the Agreement to Fund. Student Accounts may take several actions:

- Return the form to the Requestor for clarification
- Reject the form due to an attempt to pay something that is not allowed
- Post it to the student's MyRed bill

If it is determined that the form should be posted to the student's MyRed bill, it will be credited as soon as possible. Student Accounts guarantees that it will post within 3-5 business days.

When the transaction posts, the following happens:

- The credit will instantly appear on the student's MyRed bill, and
- An email will be sent to the Requestor and both Approvers stating that the credit has been posted to the student's MyRed bill and a pdf of the completed form is attached.

#### **A Note for All Roles: How Charges Appear in SAP**

- If the form was processed and posted by Student Accounts as a **One Time Only**, the charge will post to the SAP account at the beginning of the month following the processing of the credits to the student's account.
- If the form was **NOT** a One Time Only, the charge will post to the SAP account at the end of the month the credit was posted.