



# UC San Diego

## Policy & Procedure Manual

---

[Search](#) | [A–Z Index](#) | [Numerical Index](#) | [Classification Guide](#) | [What's New](#)

### ACCOUNTING PROCEDURES - GENERAL

#### Section: 300-70

Effective: 01/09/1984

Supersedes: 03/29/1971

Review Date: TBD

Issuance Date: 01/09/1984

Issuing Office: [General Accounting Division](#)

---

### STUDENT FEE DEFERMENTS, WAIVERS, EXEMPTIONS, AND REFUNDS

#### I. REFERENCES

- A. Systemwide Accounting Manual  
SS-772-33 Student Fees, Exemptions, Waivers, Special Provisions
- B. Resolution on the Education Fee adopted at the February 20, 1970 meeting of the Board of Regents, as amended.
- C. Student Fees and Deposits-issued by Vice President-Planning and Analysis for appropriate fiscal year.

#### II. BACKGROUND

It is sometimes necessary and appropriate for all or a portion of a student's registration fees to be deferred for payment at a date later than the first day of class in any particular quarter or for payment by someone other than the student. It is also appropriate in certain cases for authorized University representatives to waive or refund all or a portion of a student's registration fees. The following defines the pertinent terms and prescribes the procedures to be followed for issuing fee deferments, fee waivers, fee exemptions, and refunds.

#### III. DEFINITIONS

##### A. Registration Fees

The term "registration fees" for purposes of this PPM Section includes (1) the University Registration Fee, (2) the University Educational Fee, (3) the Nonresident Tuition Fee, (4) the Student Center Fee, (5) for undergraduate students, the Campus Activity Fee, and (6) the Recreation Facility Fee.

##### B. Fee Payment Authorization

The *Fee Payment Authorization, FPA, Exhibit A*, is a document which, when issued by an authorized representative of the University under approved circumstances, authorizes: (1) collection of a student's registration fees from a sponsor, such as a Government agency or a scholarship fund, or (2) postpones payment of all or a portion of the student's registration fees. Postponement of fee payment by means of this document can be for a short or long period of time.

For a short term postponement, a student cannot use the installment basis for payment of fees; the fees become payable within a specified period of time, e.g., sixty days. When a long term loan program is used to pay the student's fees, the payment is postponed until, generally speaking, the student has completed his/her education or withdrawn from enrollment at an accredited institution of higher learning. Such deferment essentially authorizes payment of the loan on a long-term installment basis after completion of

education or withdrawal from enrollment, such long-term obligation on the part of the student being evidenced by his/her execution of the *Fee Payment Authorization* form and a *Promissory Note*. Procedures for processing such documents are contained below.

**C. Fee Waiver/Special Provisions**

The *Fee Waiver/Special Provisions, Exhibit B*, is a document which, when issued by an authorized representative of the University under approved circumstances, cancels all or a portion of the student's registration fees. The schedule of fees is published in the University of California Booklet on "Student Fees and Deposits."

**D. Fee Exemptions**

The *Fee Exemption, Exhibit C*, is similar to the *Fee Waiver/Special Provision, Exhibit E* lists under what circumstances each document is to be used.

**E. Refunds**

A refund for purposes of this PPM Section is a disbursement made by the University to return to a student all or a portion of the amount of registration fees that he/she paid in cash for a particular quarter when it is subsequently determined that he/she is entitled to a fee deferment or fee waiver for that quarter.

Other refunds based upon part-time attendance or the withdrawal of a student from the University are made within the terms of the refund schedules published in the Vice President-Planning and Analysis booklet on "Student Fees and Deposits."

**IV. PROCEDURE**

**A. General**

Forms for *Fee Payment Authorization, Exhibit A*; *Fee Waiver/Special Provisions, Exhibit B*; and *Fee Exemption, Exhibit C*, may be obtained from the Accounting Office. Student Financial Services maintains their own supply. (Each issuing office is responsible for the accountability and security of all numbered forms they receive.) The forms should be used in numerical sequence. Whenever a set is withdrawn from use, all copies are to be marked "Void." The Green copy of the *Fee Payment Authorization* form, the Pink copy of the *Fee Waiver/Special Provisions* form, and the Pink copy of the *Fee Exemption* form are retained by the issuing office for numerical accountability. Signature specimens of University officials authorized to execute such forms (see *Exhibit D* and *Exhibit E*) or their appointed representatives should be submitted by memorandum (*Exhibit F*) to the General Accounting Division of the Accounting Office.

**B. Instructions**

Instructions for preparation of the *Fee Payment Authorization* form, the *Fee Waiver/Special Provisions*, and the *Fee Exemption* form are included with the Exhibits. Each issuing office should print legibly and complete all information required on the appropriate form. Only an indelible instrument such as a pen or typewriter can be used to fill out the form. Deferments and waivers for UCSD graduate students which represent fellowships, scholarships, or any other formally recognized educational benefit for the student must be countersigned by authorized personnel in the Office of Graduate Studies and Research.

**C. Distribution**

Distribution of copies by the issuing office of the *Fee Payment Authorization, Fee Waiver/Special Provisions*, and *Fee Exemption* forms is handled as follows.

1. *Fee Payment Authorization*
  - a. Direct the student to present the White and Pink copies to the Cashier when registering and to retain the Yellow copy for his/her personal record.
  - b. Forward the Blue copy to the Accounting Office by campus mail.
  - c. Retain the Green copy.
2. *Fee Waiver/Special Provisions and Fee Exemptions*
  - a. Direct the student to present the White and Green copies to the Cashier when registering and to retain the Goldenrod copy for his/her personal record.
  - b. Forward the Yellow copy immediately to the Accounting Office by campus mail.
  - c. Retain the pink copy.

**D. Refunds**

If a *Fee Payment Authorization*, *Fee Waiver/Special Provisions*, or *Fee Exemption* is issued after a student has paid his/her registration fees in cash, the issuing office initiates a *Request for Issuance of Check*, Form 5, and forwards it to the Accounting Office, together with the White, Pink, and Blue copies of the *Fee Payment Authorization*, or the White, Green, and Yellow copies of the *Fee Waiver/Special Provisions* or *Fee Exemption* as the case may be. The date and cash ring number of the student's payment is reflected on the student's receipt or can be obtained from the cashier. Both of these plus the preprinted form number appearing in the upper right hand corner of the executed *Fee Payment Authorization*, *Fee Waiver/Special Provisions*, or *Fee Exemption* form and the reason for refund are to be typed on the Form 5 by the issuing office. The word "Refund" is to be placed on the DISPOSITION REFERENCE line on the lower left-hand corner of the *Fee Payment Authorization*, *Fee Waiver/Special Provisions*, or *Fee Exemption* form.

If the student is in the Financial Aid (FALCON) system, the refund will be generated automatically through the system. The White, Pink, and Blue copies of the *Fee Payment Authorization* is forwarded to the Accounting Office with the date of the refund check annotated on the "Refund Issued" line in the lower left-hand corner.

**E. Petition for Waiver Reclassification**

Offices which have deferred all or a portion of the student's registration fees because the student has petitioned for a waiver or a change of legal residency are responsible for informing the Accounting Office of the action taken on the petition. If the petition is approved, a *Fee Waiver/Special Provisions* should be prepared with an appropriate explanation and forwarded to the Accounting Office. If the petition is denied, the Accounting Office must be notified in writing so it can prepare a *University Invoice* (GUARD) in the amount of the fees so deferred.



# UC San Diego

## Policy & Procedure Manual

[Search](#) | [A-Z Index](#) | [Numerical Index](#) | [Classification Guide](#) | [What's New](#)

### ACCOUNTING PROCEDURES - GENERAL

#### Section: 300-70 EXHIBIT A

Effective: 01/09/1984


Supersedes: 03/29/1971

Review Date: TBD

Issuance Date: 01/09/1984

Issuing Office: [General Accounting Division](#)

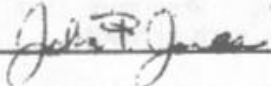
#### EXHIBIT A

<b>SAN DIEGO</b>	<b>06</b>		<b>Fee Payment Authorization</b> USFA130 (R 6/75) H6130	No. 17345
<small>Campus</small> U - XXXXX XXX				
<small>Student Number</small> XXX-XX-XXXX				
<small>Social Security Number</small>		JONES, John Paul	1/10/83	
		<small>Name, Last First Middle</small>	<small>Date</small>	

is authorized to use the funds listed below towards the total cost of registration for the Winter Quarter 83

TC	Month	Agy.	Def. No.	Name of Fund Source	Amount	Acct.-Fund-Sub.-Ref. No.
16	JAN 83	XX	17345	Account Name	200 00	XXXXXX-XXXXX-X-JONEXX
16	JAN 83	XX	17345	Other Account Name	44 00	XXXXXX-XXXXX-X-JONEXX
					244 00	

"I understand that if for any reason I do not qualify for the above funds, I must pay the above amount to the Regents of the University of California in order to be registered for the quarter indicated. In the event of my withdrawal, I understand that any refund may be returned to the fund source indicated."

Authorized Approval \_\_\_\_\_ Student's Signature 

Refund Issued \_\_\_\_\_ Department \_\_\_\_\_

**INSTRUCTIONS FOR ISSUANCE OF FEE PAYMENT AUTHORIZATIONS**

1. Date: Enter the date that the form is issued.
2. Student Roster Number: Enter the Student Roster number. This number is prefixed by the letter “U” or “G” and followed by five numbers, a space, and three numbers. The student number is reflected on the registration and enrollment cards and is on record in the Registrar’s Office. Because many names are similar and some are the same, the roster number is the recognized identification of each student and the key to the Data Processing Center’s student registration records. A student’s roster number can vary from quarter to quarter, so care should be taken in using the current quarter’s assigned number.
3. Student Name: Print the student’s name (last name, first name, then middle name) exactly as recorded on the official registration records. Students should be questioned whenever it appears that nicknames, initials, or other abbreviations are offered instead of the legal name.
4. Quarter and Year: Enter appropriate information: Fall, Winter, Spring, or Summer and the year.
5. Account to be Charged: Enter the account number and name; e.g., XXXXXX-XXXXX-X-XXXXXX, Undergraduate Student Aid, starting with the first line. When more than one account is to be charged, use a separate line for each account.  
When an expenditure account is used, the reference number will consist of the first four (4) letters of the student’s last name plus the last two (2) digits of his/her social security number. When a balance sheet is used, the reference number will consist of a unique six digit number assigned to the student.
6. Amount: Do not list each fee separately unless each fee is going to be paid by a different account number. Use only one line for the total amount of fees for each account. Place the total of all fees on the bottom line if more than one account is used.
7. Issuing Department’s Approval: The individual authorized to issue the Fee Payment Authorization (of his/her authorized representative) signs the space marked APPROVAL and enters his/her department name. If the Fee Payment Authorization is for a graduate student, the form must be countersigned by the Office of Graduate Studies and Research to the left of the approval line.
8. Student’s Signature and Address: The undergraduate is required to sign the Fee Payment Authorization acknowledging his/her agreement with the terms printed on the form. He/She should enter his/her local address, or, if not situated, his/her permanent address.



# UC San Diego

## Policy & Procedure Manual

[Search](#) | [A-Z Index](#) | [Numerical Index](#) | [Classification Guide](#) | [What's New](#)

### ACCOUNTING PROCEDURES - GENERAL

#### Section: 300-70 EXHIBIT B

Effective: 01/09/1984

Supersedes: 03/29/1971

Review Date: TBD

Issuance Date: 01/09/1984

Issuing Office: [General Accounting Division](#)

#### EXHIBIT B

<b>SAN DIEGO 06</b>	<b>UNIVERSITY OF CALIFORNIA</b>	XXXXXX	<b>TC15W</b>
<b>STUDENT - IMPORTANT</b> PRESENT WHITE & GREEN COPIES TO CASHIER WHEN PAYING FEES	<b>FEE WAIVER/SPECIAL PROVISIONS</b>		DATE <u>1/10/83</u>
<u>G - XXXXX-XXX</u>	<u>JONES,</u>	<u>Robert</u>	<u>Paul</u>
STUDENT ROSTER NO.	NAME LAST	FIRST	MIDDLE
IS PERMITTED TO REGISTER FOR THE <u>Winter Qtr. 83</u> WITHOUT PAYMENT OF THE FOLLOWING FEE(S) WHICH ARE WAIVED FOR THE REASON(S) INDICATED:			
BASIS FOR WAIVER OF REGISTRATION AND RELATED FEES (CHECK ONE)	TYPE	DISTRIB	TYPE OF FEE
EMPLOYEE-STUDENT-NOT ELIGIBLE FOR STUDENT HEALTH, COUNSELING OR GYM-NASIA NOT TO EXCEED SIX (6) UNITS, OR ONE COURSE, WHICHEVER IS GREATER	1	01	REGISTRATION FEE
EDUCATION ABROAD PROGRAM (UCSD STUDENT GOING ABROAD)	2	03 20 05	ASUCSD FEE EDUCATIONAL FEE STUDENT CENTER FEE
BASIS FOR WAIVER OF NONRESIDENT TUITION FEE (CHECK ONE)			
UNDERGRADUATE-REDUCED UNITS. NOT TO EXCEED _____ UNITS	1		
RESIDENCY RECLASSIFICATION	<input checked="" type="checkbox"/>	5	NON RESIDENT FEE
		02	
			XXX.XX
			XXX.XX
			<b>TOTAL WAIVED \$XXX.XX</b>
DEFERMENT REFERENCE _____	DISTRIBUTION WHITE STUDENT FOR REGISTRATION GREEN CASHIER CANARY ACCOUNTING PINK DEPARTMENT (ISSUING OFFICE) GOLDENROD STUDENT		
DISPOSITION REFERENCE _____	 <b>AUTHORIZED APPROVAL</b> <b>Biology</b> DEPARTMENT		
DPC FORM NO. 80, JUNE 1964 REV. 8/71			

**INSTRUCTIONS FOR ISSUANCE OF FEE WAIVERS**

1. Date: Enter the date that the form is issued
2. Student Roster Number: Enter the Student Roster Number, This number is prefixed by the letter "U" or "G" and followed by five numbers, a space, and three numbers. The student number is reflected on the registration and enrollment cards and is on record in the Registrar's Office. Because many names are similar and some are the same, the roster number is the recognized identification of each student and the key to the Data Processing Center's student registration records. A student's roster number can vary from quarter to quarter, so care should be taken in using the current quarter's assigned number.
3. Student Name: Print the student's name (last name, first name, then middle name) exactly as recorded on the official registration records. Students should be questioned whenever it appears that nicknames, initials, or other abbreviations are offered instead of the legal name.
4. Quarter and Year: Enter appropriate information: Fall, Winter, Spring, or Summer and the year the quarter starts.
5. Basis for Waiver and Amount: Check the proper basis for issuing the waiver in the column provided and place the amounts of fees being waived in the AMOUNT column next to the correct type of fee. For waivers not printed on the form, refer to *Exhibit E* for Type Code and amount. Please note that the upper section of the form is for Registration and other related fees and the bottom portion is for the Nonresident Tuition Fee.
6. Issuing Officer's Signature: The officer authorizing the waiver (or his/her representative) signs the space marked AUTHORIZED APPROVAL and enters his/her department's name.



# UC San Diego

## Policy & Procedure Manual

[Search](#) | [A-Z Index](#) | [Numerical Index](#) | [Classification Guide](#) | [What's New](#)

### ACCOUNTING PROCEDURES - GENERAL

#### Section: 300-70 EXHIBIT C

Effective: 01/09/1984

Supersedes: 03/29/1971

Review Date: TBD

Issuance Date: 01/09/1984

Issuing Office: [General Accounting Division](#)

### EXHIBIT C

<b>SAN DIEGO 06</b>	<b>UNIVERSITY OF CALIFORNIA</b>	TC15W 7XXXXX
<b>STUDENT - IMPORTANT</b> PRESENT WHITE & GREEN COPIES TO CASHIER WHEN PAYING FEES	<b>FEE EXEMPTION</b>	DATE <u>12/6/83</u>
U XXXXX XXX	Martin, Charles	Robert
STUDENT ROSTER NO. _____	NAME LAST	FIRST MIDDLE
IS PERMITTED TO REGISTER FOR THE <u>WINTER QUARTER, 84</u> WITHOUT PAYMENT OF THE FOLLOWING FEE(S) WHICH ARE EXEMPTED FOR THE REASON(S) INDICATED:		
<b>BASIS FOR EXEMPTION OF REGISTRATION AND RELATED FEES (CHECK ONE)</b>	TYPE	DISTRIB
VETERAN'S DEPENDENT _____	<input checked="" type="checkbox"/> 07	01
LAWMAN'S OR FIREMAN'S CHILD _____	<input type="checkbox"/> 08	03
		20
		02
<b>BASIS FOR EXEMPTION OF NONRESIDENT TUITION FEE (CHECK ONE)</b>		
MILITARY DEPENDENTS (SERVICEMAN'S CHILD OR SPOUSE) _____	<input type="checkbox"/> 2	
TEACHING CREDENTIAL CANDIDATE _____	<input type="checkbox"/> 3	
LAWMAN'S OR FIREMAN'S CHILD _____	<input type="checkbox"/> 4	02
		NON RESIDENT FEE
<b>TOTAL EXEMPTED</b>		<u>434.00</u>
DEFERMENT REFERENCE _____	DISTRIBUTION WHITE STUDENT FOR REGISTRATION GREEN CASHIER CANARY ACCOUNTING PINK DEPARTMENT (ISSUING OFFICE) GOLDENROD STUDENT	AUTHORIZED APPROVAL <u>SFS, Veteran's Affairs</u> DEPARTMENT
DISPOSITION REFERENCE _____		
<small>DPC FORM NO. 80, JUNE 1964 REV. 8/71</small>		



**INSTRUCTIONS FOR ISSUANCE OF FEE EXEMPTIONS**

1. Date: Enter the date that the form is issued.
2. Student Roster Number: Enter the Student Roster Number. This number is prefixed by the letter "U" or "G" and followed by five numbers, a space, and three numbers. The student number is reflected on the registration and enrollment cards and is on record in the Registrar's Office. Because many names are similar and some are the same, the roster number is the recognized identification of each student and the key to the Data Processing Center's student registration records. A student's roster number can vary from quarter to quarter, so care should be taken in using the current quarter's assigned number.
3. Student Name: Print the student's name (last name, first name, then middle name) exactly as recorded on the official registration records. Students should be questioned whenever it appears that nicknames, initials, or other abbreviations are offered instead of the legal name.
4. Quarter and Year: Enter appropriate information: Fall, Winter, Spring, or Summer and the year the quarter starts.
5. Basis for Waiver and Amount: Check the proper basis for issuing the waiver in the column provided and place the amounts of fees being waived in the AMOUNT column next to the correct type of fee. For waivers not printed on the form, refer to *Exhibit E* for Type Code and amount. Please note that the upper section of the form is for Registration and other related fees and the bottom portion is for the Nonresident Tuition Fee.
6. Issuing Officer's Signature: The officer authorizing the waiver (or his/her representative) signs the space marked AUTHORIZED APPROVAL and enters his/her department's name.



# UC San Diego

## Policy & Procedure Manual

[Search](#) | [A-Z Index](#) | [Numerical Index](#) | [Classification Guide](#) | [What's New](#)

### ACCOUNTING PROCEDURES - GENERAL

#### Section: 300-70 EXHIBIT D

Effective: 01/09/1984

Supersedes: 03/29/1971

Review Date: TBD

Issuance Date: 01/09/1984

Issuing Office: [General Accounting Division](#)

### EXHIBIT D

#### STUDENT FEE DEPARTMENTS

<u>Basis of Deferment</u>	<u>Authorized Issuing Office</u>	<u>Fees Deferred</u>
Fee paid by agent*	Accounting/Student Financial Services/OGSR	Terms of Award
Fee paid by University Funds:		
Graduate - Department Funds (e.g., training grants, departmental endowments)	Department**	Terms of Award
Graduate - VC-GS&R Funds	Office of Graduate Studies and Research	Terms of Award
Undergraduate	Student Financial Services	Terms of Award
Foreign Student Funds in Transit Government to be billed Petition for Waiver	Office issuing deferment Office issuing deferment Office issuing waiver	All fees assessed All fees assessed Fees petitioned for waiver
Graduate Student - Distinguished: Scholarship	Office of Graduate Studies and Research	Nonresident Tuition
Faculty Dependent	Office of Graduate Studies and Research	Nonresident Tuition
Education Abroad Program (Graduate)	Office of Graduate Studies and Research	Nonresident Tuition

**University of California San Diego Policy – PPM 300 – 70 EXHIBIT D**  
**PPM 300 – 70 EXHIBIT D Student Fee Departments**

---

\*Where funds for student have been deposited with UCSD or where outside agency or business is to be billed.

e.g. Navy Postgraduate School  
Navy Electronics Laboratory  
California State Department of Rehabilitation

\*Must be countersigned by authorized personnel in the Office of Graduate Studies and Research for Graduate Students (except to M.D. Candidates).



# UC San Diego

## Policy & Procedure Manual

[Search](#) | [A-Z Index](#) | [Numerical Index](#) | [Classification Guide](#) | [What's New](#)

### ACCOUNTING PROCEDURES - GENERAL

#### Section: 300-70 EXHIBIT E

Effective: 01/09/1984

Supersedes: 03/29/1971

Review Date: TBD

Issuance Date: 01/09/1984

Issuing Office: [General Accounting Division](#)

### EXHIBIT E

<u>Basis of Waiver</u>	<u>Authorized Issuing Office</u>	<u>Code</u>	<u>Fee Waived*</u>
<u>REGISTRATION AND RELATED FEES</u>			
Employee-Student	Staff or Academic Personnel	01	2/3 Registration 2/3 Educational Campus Activity
Education Abroad Program (Undergraduate)	Registrar	02	All Fees
Exceptional High School Student-EAH	Relations with Schools	03	2/3 Registration 2/3 Educational Campus Activity Student Center Rec Facility Fee
Joint Doctoral Program(San Diego State University students only)	Registrar	05	All Fees
Graduate Intercampus Exchange Program (only when UCSD is the host campus)	Office of Graduate Studies & Research	06	All Fees
Intercollege Exchange/Dartmouth	Registrar	09	All Fees
Graduate Student authorized to study outside State throughout Quarter	Office of Graduate Studies & Research	10	1/2 Registration
Nurse Practitioner Program	Naval Regional Medical Center	11	All Fees less \$50
Mesa Exchange Student	Registrar	12	All Fees
<u>NONRESIDENT TUITION</u>			
Residency Reclassification	Registrar	5	Nonresident
Graduate Intercampus Exchange	Registrar	6	Nonresident
Faculty Dependent/Los Alamos	Registrar	7	Nonresident
<u>FEE EXEMPTION</u>			
Military Dependent	Registrar	02	Nonresident

**University of California San Diego Policy – PPM 300 – 70 EXHIBIT E  
PPM 300 – 70 EXHIBIT E Registration and Related Fees**

---

Veteran's Dependent

Student Financial  
Services/Veteran's Affairs

07

Registration Fee  
Educational Fee



# UC San Diego

## Policy & Procedure Manual

[Search](#) | [A-Z Index](#) | [Numerical Index](#) | [Classification Guide](#) | [What's New](#)

### ACCOUNTING PROCEDURES - GENERAL

#### Section: 300-70 EXHIBIT F

Effective: 01/09/1984

Supersedes: 03/29/1971

Review Date: TBD

Issuance Date: 01/09/1984

Issuing Office: [General Accounting Division](#)

#### EXHIBIT F

#### TO ACCOUNTING OFFICER:

In accordance with the procedure outlined in PPM 300-70, Paragraph IV, I am appointing the person(s) listed below as my authorized representative(s) to approve fee deferments or fee waivers (as appropriate) against account number(s):

	LOC	Account Number	Fund	Sub	Account Name
1.	6				
2.	6				
3.	6				
4.	6				

This authorizes:

Name	Title	Signature

To act in such regards for Department Head at all time. \_\_\_\_\_

To act in such regards in absence of Department Head. \_\_\_\_\_

Beginning Date: \_\_\_\_\_, 19\_\_\_\_. This authorization remains in effect until cancelled.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Title