

Tuition Remission Administrative System: Using the KFS Account Change Form

Purpose

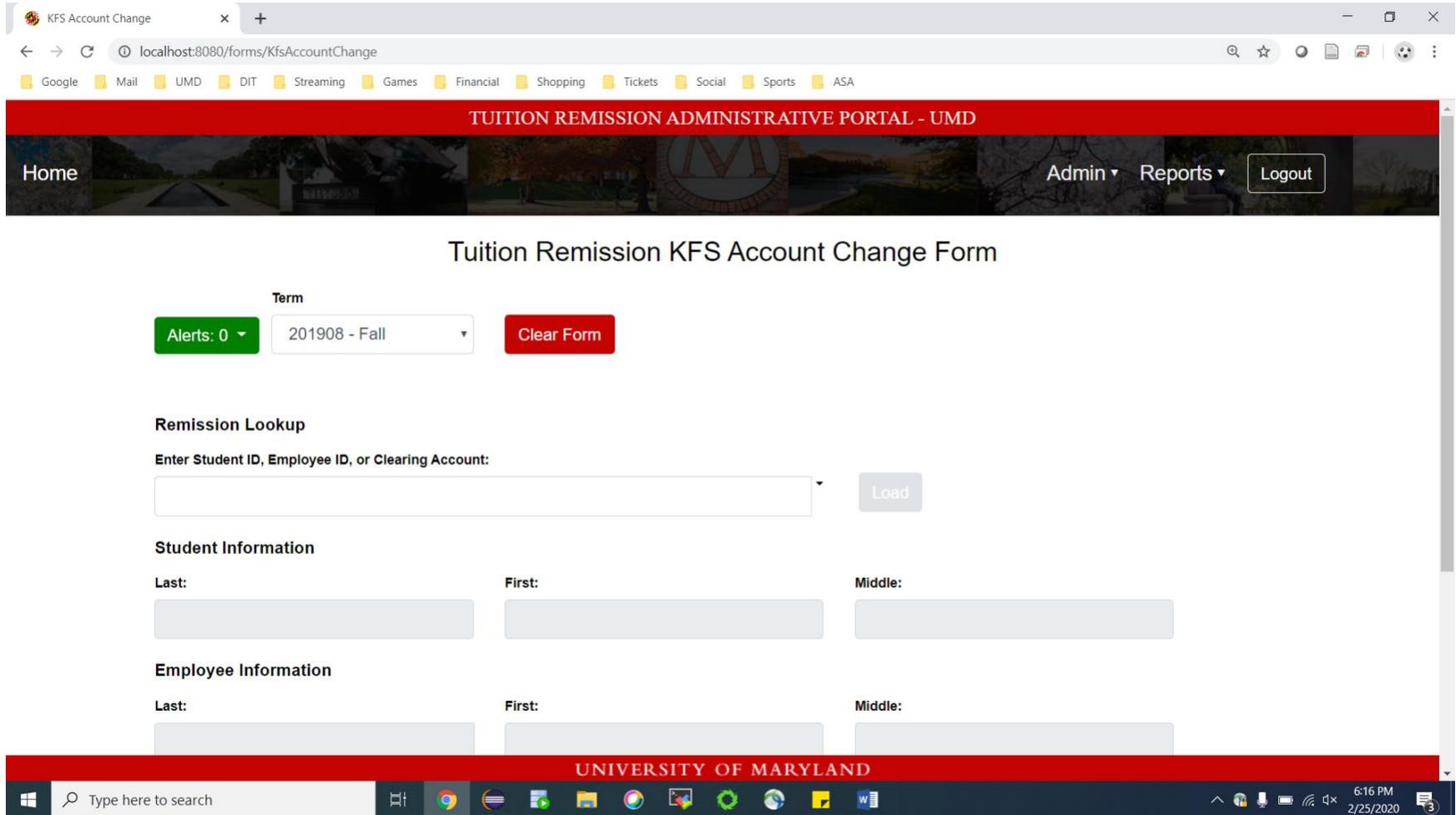
The KFS Account Change form is used by authorized department business officers to change the account number that an employee's tuition remission is charged to. This is allowed in the following two cases:

1. A restricted federal award which states in the award documentation that the award does not include tuition expense. In this case, the tuition expense can be moved to another non-state account in the department.
2. The funding source for an employee changed during the semester. In this case, the tuition remission expense should be charged to the account from which the employee was paid at the end of the academic semester drop/add period.

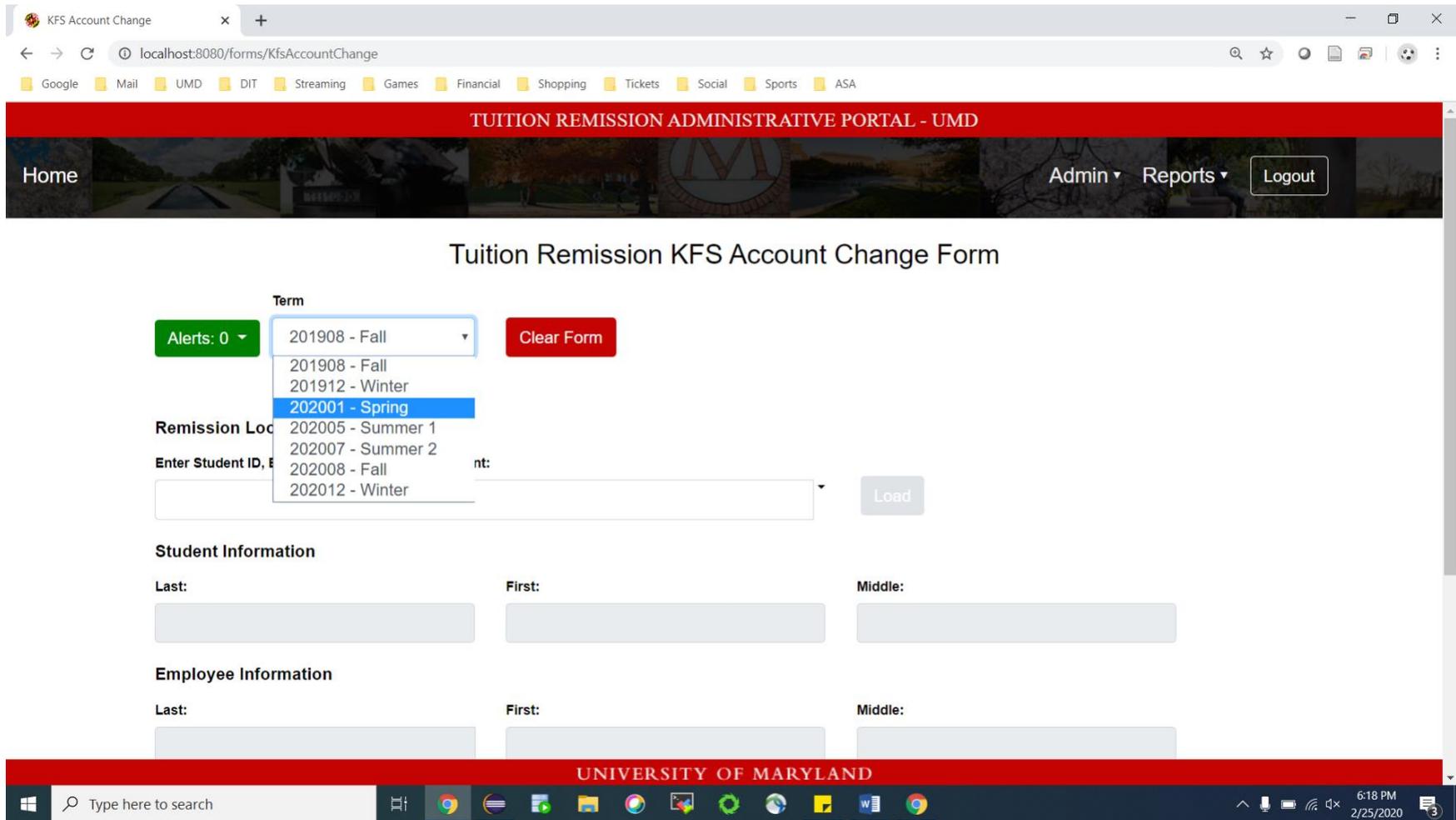
Instructions on using the KFS Account Change Form begin on the next page.

Instructions

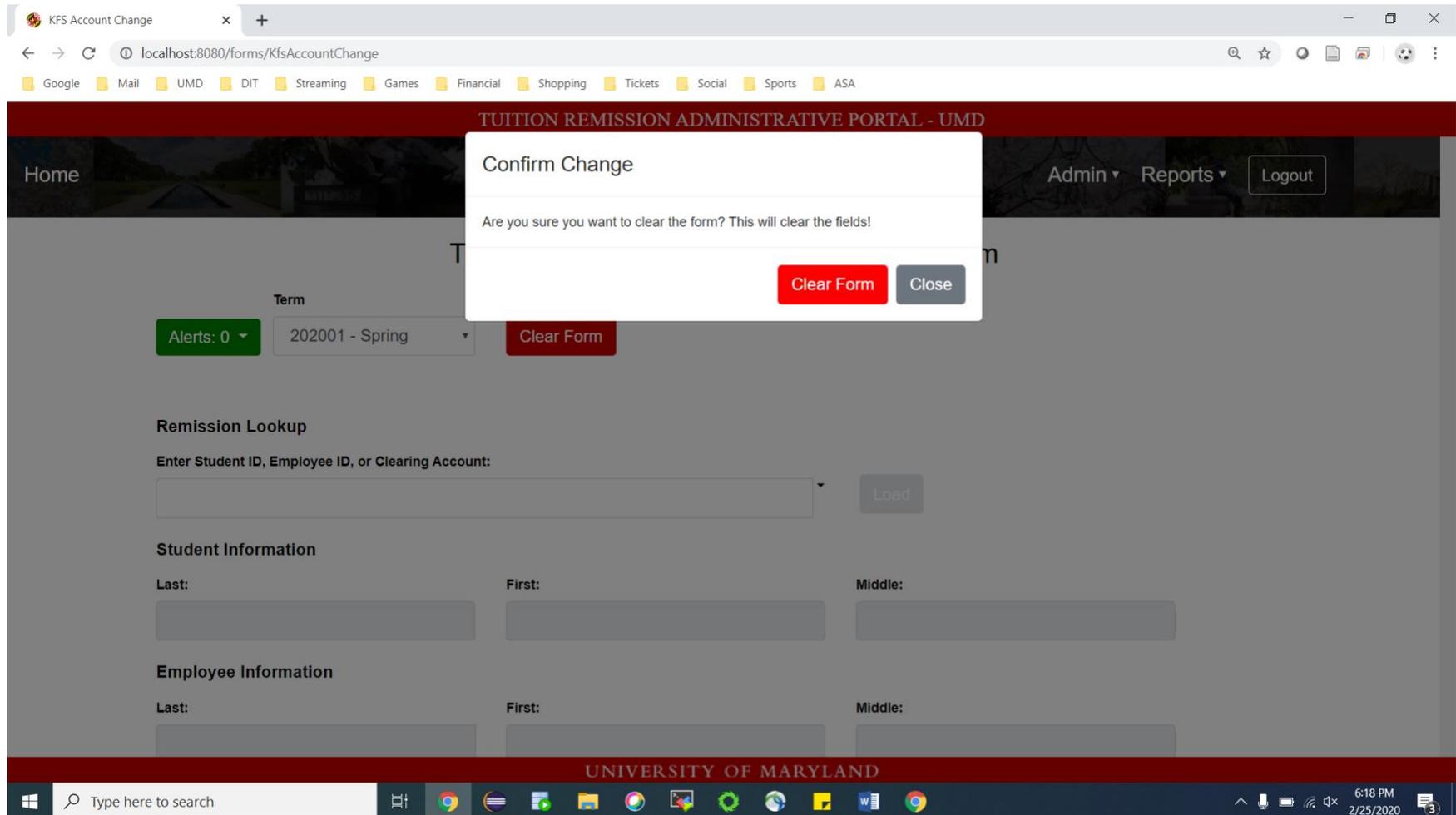
1. Navigate to the Tuition Remission Administrative System KFS Account Change Form:
<http://trs.umd.edu/forms/KfsAccountChange>.



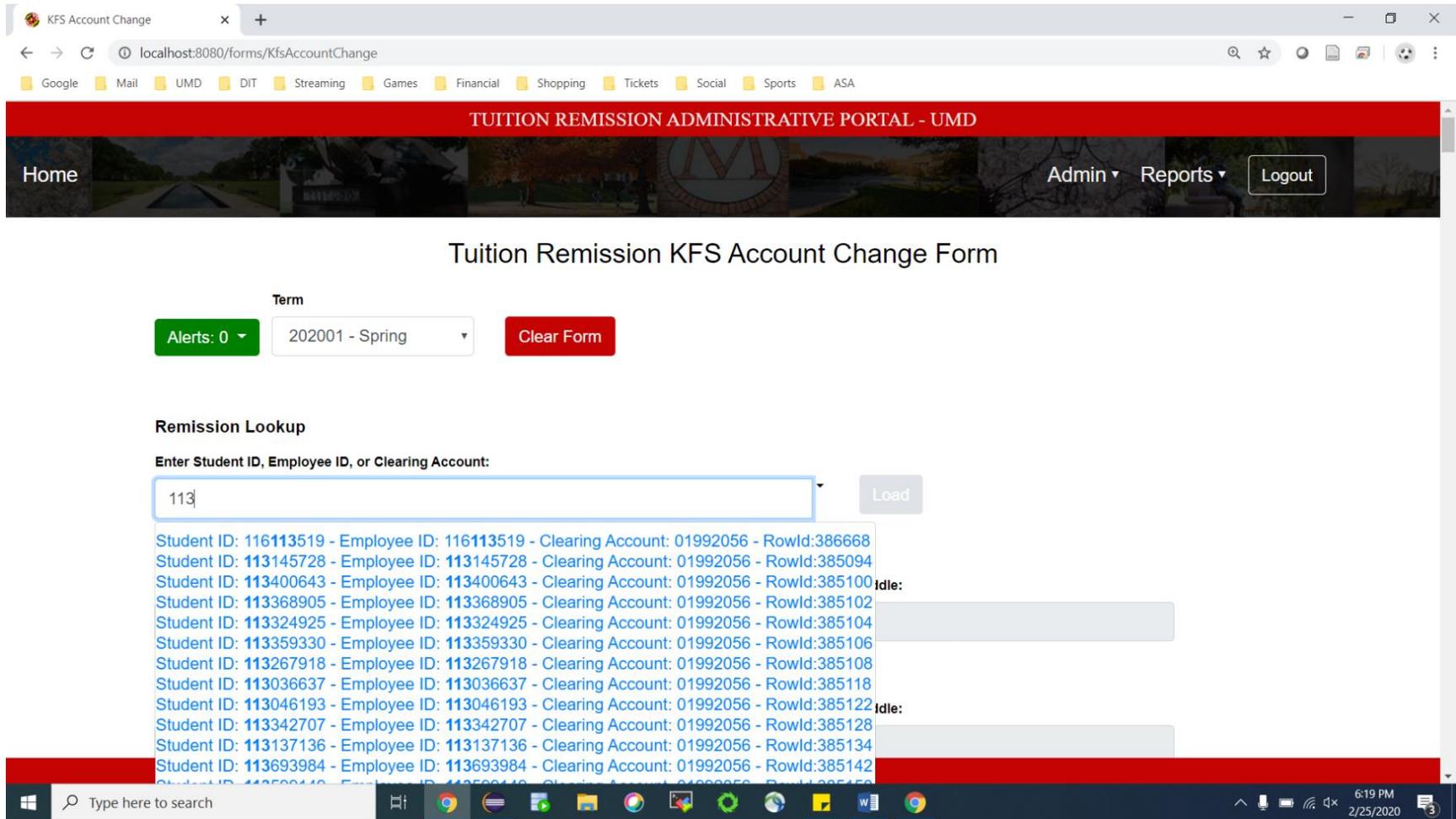
2. The form will automatically select the current term. The options are: the previous term, the current term, and all established future terms.



- When you change the term, the form will prompt you to make sure that is what you meant and to notify that the form will be cleared.



4. As you start typing in the Student ID or Employee ID, matching records for the selected term will be shown.



5. Select the record desired from the drop down menu. The search bar will then auto-populate with information from the selected record. The search bar will become grey and read only. The 'Load' button will become red and you will be able to click on it now. (Once you have selected a record, you will need to click the 'Clear Form' button to pick a new record.)

KFS Account Change

localhost:8080/forms/KfsAccountChange

TUITION REMISSION ADMINISTRATIVE PORTAL - UMD

Home Admin Reports Logout

Tuition Remission KFS Account Change Form

Term

Alerts: 0 202001 - Spring Clear Form

Remission Lookup

Enter Student ID, Employee ID, or Clearing Account:

113 Load

Student ID: 116113519 - Employee ID: 116113519 - Clearing Account: 01992056 - RowId:386668
Student ID: 113145728 - Employee ID: 113145728 - Clearing Account: 01992056 - RowId:385094
Student ID: 113400643 - Employee ID: 113400643 - Clearing Account: 01992056 - RowId:385100
Student ID: 113368905 - Employee ID: 113368905 - Clearing Account: 01992056 - RowId:385102
Student ID: 113324925 - Employee ID: 113324925 - Clearing Account: 01992056 - RowId:385104
Student ID: 113359330 - Employee ID: 113359330 - Clearing Account: 01992056 - RowId:385106
Student ID: 113267918 - Employee ID: 113267918 - Clearing Account: 01992056 - RowId:385108
Student ID: 113036637 - Employee ID: 113036637 - Clearing Account: 01992056 - RowId:385118
Student ID: 113046193 - Employee ID: 113046193 - Clearing Account: 01992056 - RowId:385122
Student ID: 113342707 - Employee ID: 113342707 - Clearing Account: 01992056 - RowId:385128
Student ID: 113137136 - Employee ID: 113137136 - Clearing Account: 01992056 - RowId:385134
Student ID: 113693984 - Employee ID: 113693984 - Clearing Account: 01992056 - RowId:385142

Type here to search

6:19 PM 2/25/2020

6. Once the load button is clicked, information from the selected record will be loaded.

TUITION REMISSION ADMINISTRATIVE PORTAL - UMD

Remission Lookup

Enter Student ID, Employee ID, or Clearing Account:

Student ID: 113612848 - Employee ID: 113612848 - Clearing Account: 01992057 - Ro **Load**

Student Information

Last: Vincent First: Andrew Middle: Michael

Employee Information

Last: Vincent First: Andrew Middle: Michael

Financial Information

Account Number	Pay Percent (100%)	Account Description
011137990	50.0	Internal:
011137880	50.0	External:
		Must be a decimal between 0.0 and 100.0

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- Enter the desired account number(s) and pay percent(s) in the table provided. The total pay percent must add up to 100. The KFS account number, pay percent, and account description are the only editable fields on this page.

When you edit the KFS account or pay percent, the system will confirm that you have access to that financial account (based on the Kuali Admin KFS Account Security table). If you do not have access to the account entered, the KFS account field will be outlined in red. If you do have access, it will be outlined in green.

The screenshot shows a web browser window with the URL localhost:8080/forms/KfsAccountChange. The page title is 'TUITION REMISSION ADMINISTRATIVE PORTAL - UMD'. It contains three main sections: Student Information, Employee Information, and Financial Information.

Student Information: Last: Vincent, First: Andrew, Middle: Michael

Employee Information: Last: Vincent, First: Andrew, Middle: Michael

Financial Information:

Account Number	Pay Percent (100%)	Account Description
011137991	50.0	
011137880	50.0	

A red 'Save' button is located below the table.

The footer of the page displays 'UNIVERSITY OF MARYLAND' and the system clock shows 11:31 AM on 2/26/2020.

8. Once the Pay Percent column adds up to 100, you can click the 'Save' button.

TUITION REMISSION ADMINISTRATIVE PORTAL - UMD

Enter Student ID, Employee ID, or Clearing Account:

Student ID: 113612848 - Employee ID: 113612848 - Clearing Account: 01992057 - RowId:3927; **Load**

Student Information

Last: Vincent First: Andrew Middle: Michael

Employee Information

Last: Vincent First: Andrew Middle: Michael

Financial Information

Account Number	Pay Percent (100%)	Account Description
011146532	90.0	
123456789	10.0	

Save

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9. If you try to submit before meeting the 3 requirements (KFS account 9 digits, KFS percents add up to 100, access to new or changed accounts), you will see an error message.

The screenshot shows a web browser window with the URL `localhost:8080/forms/KfsAccountChange`. The page title is "TUITION REMISSION ADMINISTRATIVE PORTAL - UMD". The main heading is "Tuition Remission KFS Account Change Form".

At the top, there is a navigation bar with "Home", "Admin", "Reports", and "Logout". Below this, there is a "Term" dropdown menu set to "202001 - Spring" and an "Alerts: 1" button. A "Clear Form" button is also present.

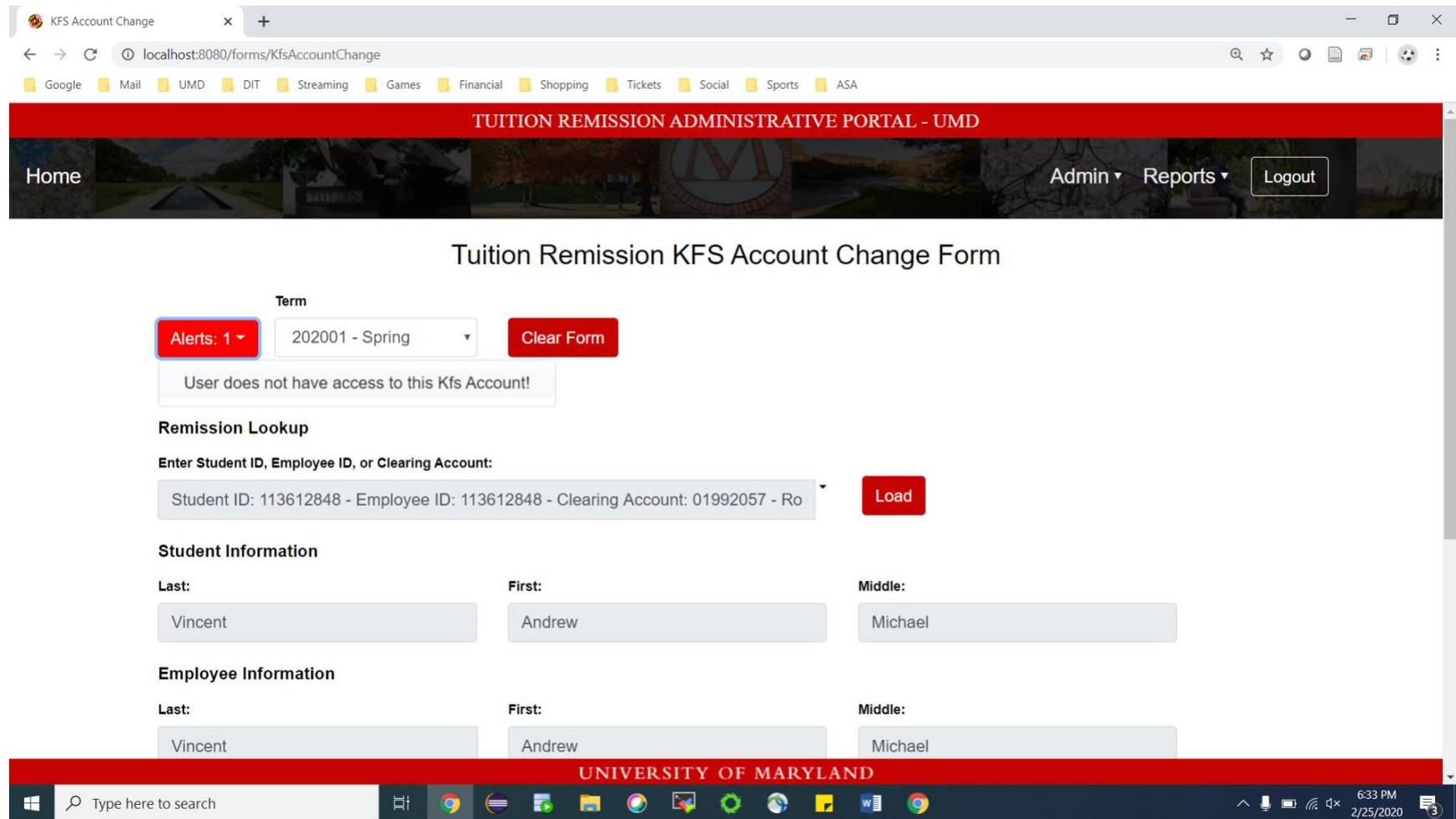
The "Remission Lookup" section contains a text input field with the value "Student ID: 113612848 - Employee ID: 113612848 - Clearing Account: 01992057 - Ro" and a "Load" button. An error message box is overlaid on this section, stating: "Error: The data in your form appears to have a problem, please refer to the Alerts button."

The "Student Information" section has three input fields for "Last:", "First:", and "Middle:", with values "Vincent", "Andrew", and "Michael" respectively.

The "Employee Information" section also has three input fields for "Last:", "First:", and "Middle:", with values "Vincent", "Andrew", and "Michael" respectively.

The footer of the page features the "UNIVERSITY OF MARYLAND" logo. The Windows taskbar at the bottom shows the search bar and various application icons, with the system tray displaying the time "6:33 PM" and date "2/25/2020".

10. After clicking the 'Alerts' button, you will see details on why the form was not submitted.



11. Once all of the requirements have been met and you click 'Submit,' you will see a message saying 'Save Successful.' You will then see an empty form from the same term you were looking at previously and you can then edit another record. When you are finished logout from the system by clicking the 'Logout' button in the upper righthand corner.

