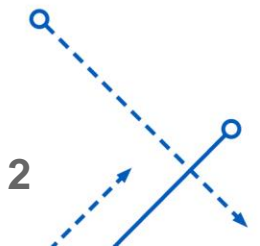


REVENUE TYPES AND PAYMENT COLLECTION METHODS

Topics

- Revenue Types (Definitions, Allowable Funding Sources and Payment Collection Methods)
- Fees and Fee Deadlines
- Payment Collection Methods
 - UB Marketplace
 - ACH/Wire Transfer
 - Slate
 - Course Merchant



Revenue Source Type	Definition	Allowable Account Type	Allowable Payment Methods	Required Forms and Documents
University Fee (SUNY Authorized)	Mandatory fees with a set dollar value that may be variable by Campus. Examples include, but are not limited to: <ul style="list-style-type: none"> • Course Based or Laboratory Fees • Mandatory Fees, including Admission Application Fees 	<ul style="list-style-type: none"> • State IFR • UBF Service – Limited Circumstances 	<ul style="list-style-type: none"> • Student Accounts 	University Fee Approval Form
University Fees (Campus Authorized)	A university fee is predominately paid by students. Fees paid to support campus services and a variety of student activities. Examples include but are not limited to: <ul style="list-style-type: none"> • Orientation Fees • Voluntary Student Health Service Fees 	<ul style="list-style-type: none"> • State IFR • UBF Service – Limited Circumstances 	<ul style="list-style-type: none"> • Student Accounts • UB or UBF Marketplace 	University Fee Approval Form
Graduate Application Fees	An application for acceptance into a graduate program leading to a Master's, Doctoral, or equivalent	<ul style="list-style-type: none"> • State IFR 	<ul style="list-style-type: none"> • Slate 	One Fee Approval Document per VP/Decanal Unit - Reach out To UBS-Fees@buffalo.edu to add a Graduate Application Fee
Tuition Deposits	A pre-admission deposit	<ul style="list-style-type: none"> • N/A 	<ul style="list-style-type: none"> • Slate 	Reach out To UBS-Fees@buffalo.edu to add a Tuition Deposit
Non-Credit Bearing Professional Development Program Fee	A non-credit bearing professional development program is a university instructional program with established methods of assessment and articulated student learning outcomes. Examples include but are not limited to: <ul style="list-style-type: none"> • Continuing Education Programs • Non-credit Academic Programs • Massive Online Learning Opportunities • Micro-Credentials 	<ul style="list-style-type: none"> • State IFR • UBF Service – Limited Circumstances 	<ul style="list-style-type: none"> • Course Merchant • UB/UBF Checkout • Other Payment Processors Require Financial Management Approval 	Non-credit Bearing Professional Development Program Fee Approval Form Contracts Required for Programs who are providing services to a single external customer with multiple participants - Signed By Purchasing and Contract Services

Revenue Types – Events and Fundraising

Revenue Source Type	Definition	Allowable Account Type	Allowable Payment Methods	Required Forms and Documents
Department Events (Non Fundraising)	A departmental event is a departmentally sponsored function for which a fee is charged to participants. Examples include but are not limited to: Conferences, Banquets, Retreats and Outings and Fairs.	<ul style="list-style-type: none"> State IFR UBF Service – Limited Circumstances RF Sponsored – Limited Circumstances 	<ul style="list-style-type: none"> UB/UBF/RF Marketplace Other Payment Processors Require Financial Management Approval 	Departmental Event Fee Approval Form Contracts Required when cohosting with another organization - Signed By Purchasing and Contract Services
Fundraising Events	Fundraising through University Advancement and Office of Alumni Engagement	<ul style="list-style-type: none"> UB Service - % cost of service provided UB Gift - % in addition to cost of service 	<ul style="list-style-type: none"> Anthology 	Reach out to Advancement
Sponsorships (Usually Event Related)	Relationship with an entity where that entity provides money, goods, or services to the university and in return, the entity receives acknowledgement of the sponsorship via signage, tickets, programs, other print materials, or online communications. Sponsorships do not involve messages endorsing or comparing products or messages that relate to the quality of products. Sponsorships differ from corporate gift support, which is generally provided without expectation of tangible benefit or quid pro quo.	<ul style="list-style-type: none"> State IFR UB Service - % cost of service provided UB Gift - % in addition to cost of service RF Sponsored – Limited Circumstances 	<ul style="list-style-type: none"> ACH/Wire Transfer Check 	Corporate Sponsorship Request Form
Advertising	Paid service purchased by a non-university entity that includes messages that contain qualitative or comparative language, price information, an endorsement, or an inducement to purchase, sell, or use the non-university advertiser's products or services.	<ul style="list-style-type: none"> State IFR UB Service - % cost of service provided UB Gift - % in addition to cost of service 	<ul style="list-style-type: none"> ACH/Wire Transfer Check 	Corporate Sponsorship Request Form
Gifts	The voluntary, non-reciprocal transfer of money or property from a funder/donor to the university. The funder/donor may be an individual, corporation, or non-profit organization. Other than an expectation that the university will use the gift for its intended purpose, the funder/donor does not expect anything of value in return besides recognition, and does not have control over expenditures. A gift may meet the interests of the donor and can be restricted or unrestricted. Gifts may be made to UB anonymously. A restricted gift is a contribution designated for a specific purpose, program, or project. If the donor does not specify any restrictions, the gift is unrestricted, and UB may allocate the funds at its own discretion.	<ul style="list-style-type: none"> UBF Gift 	<ul style="list-style-type: none"> UB Giving Page 	N/A
Raffles/Auctions	Game of chance in which a participant pays money in return for a ticket or other receipt and in which a prize is awarded on the basis of a winning number or numbers, color or colors, or symbol or symbols designated on the ticket or receipt, determined by chance as a result of a drawing from among those tickets or receipts previously sold. (NYS General Municipal Law, Section 186.3-b) Raffles include Penny Social, Queen of Hearts, and Treasure Chest Raffles.	<ul style="list-style-type: none"> UBF Service 	<ul style="list-style-type: none"> Cash 	Raffle Proposal

Revenue Types – Research and Service

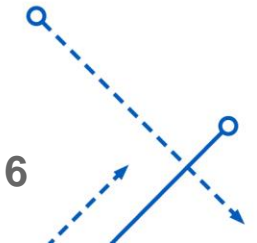
Revenue Source Type	Definition	Allowable Account Type	Allowable Payment Methods	Required Forms and Documents
Service Centers	A service center is an organization that provides a specific technical or administrative service that supports the internal operating activities of the university. Examples include but are not limited to: Lab Analysis Services; Print and Mail Services; Instrumentation Shops; Animal Care Services and Clinics.	<ul style="list-style-type: none"> State IFR UBF Service – Limited Circumstances RF Non Sponsored Service & Facility 	<ul style="list-style-type: none"> UB/UBF/RF Marketplace Other Payment Processors Require Financial Management Approval 	Service Center Fee Approval Form Contracts Required for External Customers - Signed By Purchasing and Contract Services (State/UBF) or Tech Transfer (RF)
One Time Service Revenue Contracts	Non recurring technical or administrative services provided.	<ul style="list-style-type: none"> State IFR UBF Service – Limited Circumstances RF Sponsored 	<ul style="list-style-type: none"> ACH/Wire Transfer 	Contracts Required for External Customers - Signed By Purchasing and Contract Services (State/UBF) or Reach out to Sponsored Project Services (RF)
Sponsored Activity	Sponsored activities are established when funds are awarded to the university by external sources in support of research, instruction, training, or services under an agreement that includes any of the following... (link to definition)	<ul style="list-style-type: none"> RF Sponsored 	<ul style="list-style-type: none"> ACH/Wire Transfer 	Reach out to Sponsored Project Services
IRB Fees	Fees charged by the Office of Research Compliance for the Institutional Review Board (IRB) to review studies	<ul style="list-style-type: none"> RF Non Sponsored Income 	<ul style="list-style-type: none"> ACH/Wire Transfer 	Reach out to the Office of Research Compliance
Royalties – Inventions	Cash, equity, or other value received by UB as consideration for license of rights to UB intellectual property	<ul style="list-style-type: none"> RF Non Sponsored Royalty 	<ul style="list-style-type: none"> ACH/Wire Transfer 	Reach out to Tech Transfer
Royalties – Publications and Journals		<ul style="list-style-type: none"> State IFR UBF Service – Limited Circumstances 	<ul style="list-style-type: none"> ACH/Wire Transfer 	Contracts Required for External Customers - Signed By Purchasing and Contract Services
Equipment Sales (RF Only)	Sale of RF Assets	<ul style="list-style-type: none"> RF Non Sponsored Income RF Sponsored 	<ul style="list-style-type: none"> ACH/Wire Transfer 	Reach out to Asset Management
Product Sales	Sale of items where there is no fundraising component	<ul style="list-style-type: none"> State IFR UBF Service 	<ul style="list-style-type: none"> UB/UBF Marketplace 	University Fee Approval Form
Room Rentals	External groups and organizations can rent space by entering into an agreement with UB, known as a Facilities Use Agreement or Revocable Permit, which provides the terms and conditions for use of campus facilities	<ul style="list-style-type: none"> State IFR UBF Service – Limited Circumstances 	<ul style="list-style-type: none"> UB/UBF Marketplace ACH/Wire Transfer 	Service Center Fee Approval Form Permits May Be Required – Reach out to Purchasing and Contract Services
Lease Agreements		<ul style="list-style-type: none"> State IFR RF Non Sponsored Income 	<ul style="list-style-type: none"> ACH/Wire Transfer 	Facility Use Rates Set by Financial Management Lease Agreements Required - Reach Out To Real Estate and Property Management

Fees

- **Regardless of funding source, any revenue being charged/collected or service provided, needs to have an approved fee on file.**
- **A master list of all approved fees is compiled in Excel and then uploaded to the website.**

The current list of all approved fees can be found here:

[Login to View a List of Approved Fees](#)



Fee Deadlines

Fee Type	Applicable Deadlines
Departmental Event Fee	Fees can be submitted anytime throughout the year.
Non-Credit Bearing Professional Development Program Fee	
Service Center Fee	
Graduate Application Fee	
Tuition Deposit	
University Fee (SUNY and Campus Approved)	University Fees must follow the Annual Fee Process Calendar. Fall / Spring Fees <ul style="list-style-type: none"> • Due to Financial Management December 15th • Due to SUNY May 1st Winter Fees <ul style="list-style-type: none"> • Due to Financial Management July 15th • Due to SUNY September 1st Spring Only Fees <ul style="list-style-type: none"> • Due to Financial Management August 15th • Due to SUNY October 1st Winter Fees <ul style="list-style-type: none"> • Due to Financial Management February 15th • Due to SUNY April 1st

Payment Collection Methods: UB Marketplace

What is UB Marketplace?

UB Marketplace is a third-party e-commerce solution allowing department Units to use UB Marketplace to accept credit and debit card payments, as well as electronic checks (e-checks), for products and services other than academic fees and tuition.

Why Use UB Marketplace?

Easily list products or services such as event tickets, conference registration, etc.

Minimize the risk associated with cash receipt collections.

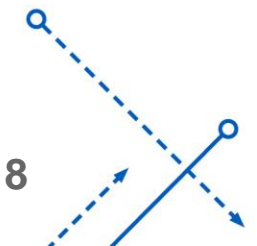
Utilize SIRI and UB Marketplace reports to review the revenue from transactions.



Marketplace

Search store

SEARCH



Payment Collection Methods: UB Marketplace

Funding Source	Webpage Links	Contact Information
UB Marketplace (State)	<u>Accepting Electronic Payments for State Funds in UB Marketplace</u>	<u>UBS-marketplace@buffalo.edu</u>
UBF Marketplace	<u>Accepting Electronic Payments for UB Foundation (UBF) Funds in UB Marketplace</u>	<u>UBFACR@buffalo.edu</u>
RF Marketplace	Coming Soon!	<u>ubsd.nsgroup@business.buffalo.edu</u>

UB Marketplace

UB Marketplace functionality includes the ability to collect different types of information using different control methods, the use of logic, and the ability to upload forms. The [Business Day Vendor Registration](#) product uses this functionality.

Business Day Vendor Registration

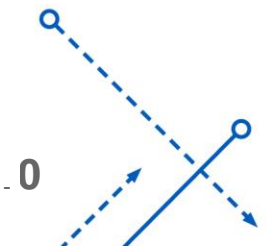


This payment is for Vendor Registration for the University at Buffalo Business Services Business Day 2023.

Location: Niagara Falls Convention Center, 101 Old Falls Street ,
Niagara Falls, NY 14303

Date/Time: Thursday, October 26, 2023 from 8:00 AM - 4:00 PM

ADD TO CALENDAR

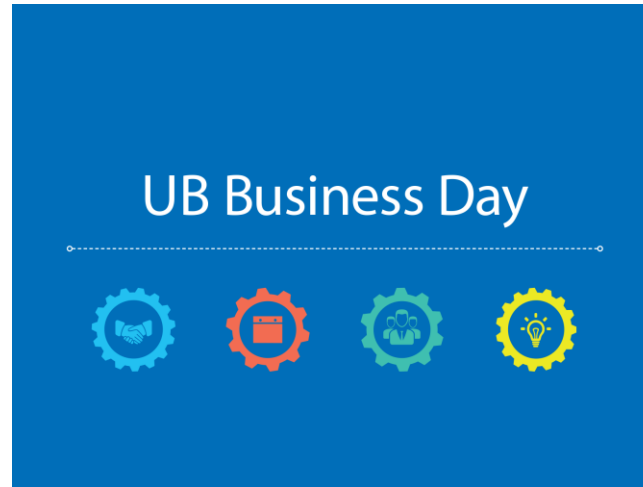


UB Marketplace Image Guidance and Accessibility

Images used in UB Marketplace must meet Accessibility standards. Contact [Tracey Eastman](#) for UB approved images.

Learn more about accessibility at UB:

<https://www.buffalo.edu/access/services/service2.html>



Not an appropriate image



Appropriate image

Upcoming Enhancements

Pendo Messaging:

What is in-app messaging?

In-app messaging is a technical capability that would allow UB to communicate with users (whether they are external customers or internal) directly through the product.



How does in-app messaging work?

In-app messaging involves displaying lightboxes, tooltips, surveys, banners, and other messaging formats right inside the app, while users are engaged with it. Because it displays messages while the user is actively using the product, in-app messages tend to have a higher response rate than push notifications or email messages.

Payment Collection Methods: ACH/Wire Transfers

Funding Source	Webpage Links/Instructions	Contact Information
State	When you are expecting an ACH or wire, you must send details, including the Income Fund Reimbursable (IFR) account to post to, to Erin Guiffrida at erinhunt@buffalo.edu , so that the amount can be properly posted to you IFR account. <u>Accepting Electronic Payments for State Funds via ACH and Wire Transfer</u>	erinhunt@buffalo.edu
UBF	When you are expecting an ACH or wire, you must send details, including the UBF account to post to, to UBFACR@buffalo.edu , so that the amount can be properly posted to your UBF account. Reach out to UBFACR@buffalo.edu to request ACH/wire information.	UBFACR@buffalo.edu
RF	If wire or electronic information is sent to the vendor, please notify the Non-Sponsored Group of the pending deposit. This information can be forwarded to the appropriate personnel to watch for the funding. This ensures that the funding will be properly identified and applied to the account without delay.	ubsd.nsgroup@business.buffalo.edu

Payment Collection Methods: Slate

What is Slate?

Many UB departments are using Slate to support their admissions process.

Slate Technolutions ('Slate') has been adopted by UB offices to handle student recruitment, application generation and processing needs. It has the capability to assist in email and text message communication, reporting, event planning, and travel arrangement, as well as the ability to capture the activity and interaction of a student throughout their admissions life cycle.

[Webpage](#)

VP Enrollment Management can assist with oversight and administration of the Central Slate instance system as well as implementation and training for school Slate leads.

Lisa Coia: lccoia@buffalo.edu Ryan Bloom: rpbloom@buffalo.edu

**As we work to sunset the ePay application, all Graduate application fees and tuition deposits reside in Slate, each time a new fee or deposit is required, a new GL code will continue be obtained through FM*

Upcoming Payment Collection Methods: Course Merchant

What is Course Merchant?

Course Merchant module will allow UB to address and improve the management and delivery of non-credit continuing education programs for external participants.

More information to be provided this Spring!





**ANY
QUESTIONS?**

WHEN? HOW? WHERE? WHO?
WHAT? WHEN? WHERE? WHAT?
WHERE? When? What? Where?
When? WHERE? WHAT? WHERE? HOW? WHEN? What? What?
When? What? When?
Why? WHEN? When? Where? WHAT? When? Why? WHERE? When? Why? HOW? HOW? WHEN? Why? WHERE? When? HOW?

Survey.....How did we do?

Take the *Session Survey* on your smart device using the QR Code on your schedule.



Important Links

Policies

- [SUNY Fee Policy](#)
- [Departmental Events Policy](#)
- [Service Centers Policy](#)
- [University Fees Policy](#)

Useful Webpages

- [Master Rate List](#)
- [Develop and Manage Fees](#)

Forms

- [UB Marketplace Requests Form \(State\)](#)
- [UB Marketplace Request Form \(UBF\)](#)

Financial Management Contacts

Carrie Hutchins

IFR, Revenue Accounting and Treasury Management

Financial Management

Phone: 716-645-2640

Email: chutchin@buffalo.edu

Ashley Butcher

Cost Accounting and Financial Reporting

Financial Management

Phone: 716-645-1521

Email: ambutche@buffalo.edu

Erin Guiffrida

IFR, Revenue Accounting and Treasury Management

Financial Management

Phone: 716-645-2601

Email: erinhunt@buffalo.edu

Sean Wong

Cost Accounting and Financial Reporting

Financial Management

Phone: 716-645-2658

Email: seanyunc@buffalo.edu

Leah Kerr

IFR, Revenue Accounting and Treasury Management

Financial Management

Phone: 716-645-0232

Email: leahkerr@buffalo.edu