

Special Fees and Use Rate Justification and Calculation Form Justification for FY

Date: Department:

Instrument Name/Laboratory Name/Service:

Location (Building/Room):

Contact information: Name:

Phone: Email:

Financial Manager:

Index originally charged when this instrument was purchased:

Is this the first rate you have proposed? Yes No

If no, provide index number for previously approved rate:

Previously approved rate \$:

Did or will your annual revenue exceed \$1,000? Yes No

If not, you may not qualify for a single Instrument/Laboratory/Service use rate.

Brief Description of the Instrument/Laboratory/Service:

If this is your first application for a use rate, describe the procedure used to estimate operational expenses and anticipated use.

Will you or do you use a per day/sample/hour/test or other basis for your rate? Please describe why the basis was chosen for the rate proposed.

Is there more than one staff/student's salary included in this rate request? Yes No

If yes, describe each individual's responsibilities with respect only to this Instrument/Lab/Service:

What form will the logbook take? Notebook Binder Computer

Where will the logbook be located?

Where will the logbook records be kept for the 7-year period?

Please download and complete the Use Rate Calculation Excel template. Use the most recent five years of financial data (or as many as possible for newer rates). Include the calculations when requesting signatures and submitting to the Committee for review.

CURRENT RATE

CALCULATED RATE

CHOSEN RATE

RENEWAL REQUESTS ARE DUE 30 DAYS BEFORE RATE EXPIRATION

Instructions

1. The description should include the manufacturer, model and tag number of the equipment. Please include the universally recognized Instrument/Laboratory/Services name.
2. The Financial Manager of the use charge index assumes all financial responsibility.
3. Locate the original P.O. for the purchase, which would include the index(s). If necessary, contact property-l@mtu.edu with the MTU tag number to locate the index number.
4. In WebFOCUS, run the report *Financial Reports - Budget vs Actual* for your D98XXX index and use the YTD figure for E496 (Use credits).
5. The policy states that your annual revenue must exceed \$1,000 to qualify for a use rate. If not, the following applies:
 - a. You may elect to group Instrument/Laboratory/Services to achieve the \$1,000 threshold. Equipment may be grouped into a single rate if a sample/process passes through each piece of equipment in the group on a regular basis.
 - b. You may direct charge expenses specific to that user to the user's index (e.g., supplies and technician salary).
6. Describe how the Instrument/Laboratory/Services is used.
7. In addition to your estimate, please attach examples of use rates at other institutions for the same or similar Instrument/Laboratory/Service.
8. This person will be responsible for maintenance, repair or operation for the Instrument/Lab/Service in order to qualify for inclusion in the use rate. Effort related to other departmental activities may not be included in the rate calculation.
9. A logbook is mandatory if charging for Instrument/Laboratory/Services. Logbook entries are required for the specific Instrument/Laboratory/Service used, the user's name, date of use, duration of use, and index to be charged.

FINAL INSTRUCTIONS

1. **Print** all the pages.
2. **Save** the entire document in digital format.
3. Have the printed copy **signed** and returned to the Use Charge Committee.
4. **Email** the digital copy of this form and a copy of the Calculation template as attachments to **ufcommittee@mtu.edu**

