



Payments to Students on Research Awards

February 23, 2016

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Who are students?

- ▶ Undergraduate students
- ▶ Graduate students
- ▶ Visiting scholars
- ▶ Participants
- ▶ NOT Post Docs



Training vs. Employment

- ▶ Knowing how to pay students requires knowing the purpose of their work
 - ▶ Training: payments given for research experience and training
 - ▶ Must be a part of the budget
 - ▶ UCSD supporting the training
 - ▶ Fellow: receiving funding to support the individual pursuit of their research
 - ▶ Employment: an employer-employee relationship is created, requiring an exchange of services for payment

Undergraduate Training

- ▶ Typical research programs for UN students:
 - ▶ NSF REU Program
 - ▶ T34 MARC NIH Training Grant
 - ▶ Frontiers of Innovation Scholars Program (FISP)
 - ▶ Interdisciplinary Collaboratories
- ▶ Research awards are not specifically for tuition & fees
- ▶ Other, non research related payments to UN Students
 - ▶ Pell, Cal Grants, UC Grants
 - ▶ Student Loans
 - ▶ Federal Work-Study
 - ▶ Scholarships



UN NSF REU Program-Training

- ▶ Students receive stipends
 - ▶ Must use account code 637560-REU Stipends
- ▶ Process:
 - ▶ Fund Manager requests 77 org/program code from OPAFS
 - ▶ Fund Manager communicates with Michele Ojeda/Becky Obayashi in Financial Aid
 - ▶ Key is to provide Becky the correct account code to use
 - ▶ Financial Aid will coordinate with student's package and will disburse funds
- ▶ Affect on students financial aid
 - ▶ Possibly has impact on other financial aid student receives because part of Estimated Financial Assistance

Scholarship Undergraduate Payment Aid ID Form

The information below is required by the Office of the President and the UCSD Financial Aid Office for reporting, tracking, and payment processing

A Scholarship Aid ID code is necessary to electronically connect your fund (IFOPAL) to pay to the UCSD student account. A Scholarship is anything that is not a payroll expense.

1. Use one Aid ID Form for the same IFOPAL. We do not need a form for each recipient.
2. On your cover email, include:
Student Names, PID#s (starts with A), Amount per student, Month or Quarter to be paid
3. **Scholarships cannot be paid until there are funds in the Index**

This is an Expense-Paying code: The scholarship first pays existing expenses on the student account. If there is a credit balance, the credit is sent to the student by mail or direct deposit (if the student signed up for direct deposit) within 3 working days after the award posts. Awards \$1,001 or greater will be paid evenly over 3 quarters unless otherwise stated below.

A scholarship might displace other financial aid for Financial Need recipients.
Academic Year Scholarships normally displace an equivalent amount of a student's financial aid.
Summer Scholarships (July, Aug., early Sept.) generally do not displace a student's financial aid.
Students should discuss possible changes to their financial aid with a Financial Aid Office Counselor.
Questions: (858) 534-1087 scholarships@ucsd.edu

Office Use: Aid ID code		Fiscal Year:	2015-2016
Name of Scholarship		Request Date	
Coordinator Name		Ext.	Email
Dept		Mail Code	
IFOPAL: Index #	Fund #	Account # 637277 Non Federal Grant	Or Acct # for Federal Grant
Organization # 77	Program # 77	(Note: Org. / Prog # must begin with 77 = Undergraduate)	
<input type="checkbox"/> Scholarship pays over three quarters			
or			
<input type="checkbox"/> Scholarship pays in one lump sum. Indicate payment month: _____			
▪ Total Fiscal Year Budget \$ _____			
▪ Maximum Award Per Student \$ _____			
▪ Enrollment Required to Pay? <input type="checkbox"/> No enrolled required, <input type="checkbox"/> Full Time, <input type="checkbox"/> Half time +, <input type="checkbox"/> Less than half time			
▪ Funding Source <input type="checkbox"/> UCOP, <input type="checkbox"/> UCSD, <input type="checkbox"/> Federal, <input type="checkbox"/> State, <input type="checkbox"/> Outside agency / Donor Gift			
▪ Type of Gift <input type="checkbox"/> Current, <input type="checkbox"/> Endowment, <input type="checkbox"/> Grant			
▪ Did UCSD Development Office Solicited Funds? <input type="checkbox"/> Yes <input type="checkbox"/> No			
▪ Recipient Selections Made By: <input type="checkbox"/> UCSD, <input type="checkbox"/> Outside Agency, <input type="checkbox"/> Other _____			
▪ Indicate if these criteria were used for Selection <input type="checkbox"/> Merit, <input type="checkbox"/> Financial Need, <input type="checkbox"/> Under-Represented Student			
▪ Additional Selection Criteria (e.g. Major, GPA, Grade Level, Other)			

UCSD - G Scholarships / Administration / Aid ID 3-13-15

Impact to Financial Aid Package?

UCSD Cost for CA Resident 4 in Household / 1 in College; 2 Parents Working; Total Net Assets \$3,000; Family Income of \$65,000	
UCSD Cost	\$ 31,365
Grant Aid (Pell, CAL, UC Grant)	(\$ 17,565)
UCSD Net Cost	\$ 13,800
<u>Family / Student Contributions to Meet Net Cost</u>	
Student Portion	
Student Loans	\$ 5,900
Work-Study or Other Employment	\$ 2,900
Parent Contribution per FAFSA	\$ 5,000

*Scholarships
can replace
\$8,800*

Undergraduate Employment

- ▶ Rarely paid on Research
- ▶ Hired like any other employee-usually through Career Services Center
- ▶ Paid through PPS
 - ▶ Including Federal Work Study program
- ▶ Does not require 77 org/program code

Graduate Student Training

- ▶ Typical Research programs for GR students:
 - ▶ T32 NIH Training Grants
 - ▶ F30 NIH Individual Training Grants
 - ▶ NSF GRFP Program
 - ▶ Private sponsor Fellowships
 - ▶ HHMI Fellowships
- ▶ Traineeship ~ Fellowship
 - ▶ Fellowship: Opportunities to allow graduate students to pursue their own research interests with funding unencumbered by institutional obligation (such as TAs, GSRs). Extremely competitive awards given to outstanding scholars based on merit of research proposal, as well as other relevant academic criteria
- ▶ May pay for Tuition & Fees and/or provide Stipends
- ▶ Tuition & Fees does NOT equal Tuition Remission

Graduate Student Training

- ▶ Must have a 78 program/index
- ▶ Account Codes to use:
 - ▶ 637550-STIPENDS
 - ▶ 637566- TUITION & FEES
 - ▶ 637564- HEALTH INSURANCE (for T32's)
- ▶ Process:
 - ▶ Fund Manager requests 78 index from OPAFS
 - ▶ Fund Manager communicates with Graduate Coordinator
 - ▶ Graduate Coordinator submits request through online tool
 - ▶ Graduate Division will set up payments monthly/quarterly as requested
 - ▶ For Training Grants, make sure that you request the Health Insurance Code separately

Graduate Employment

- ▶ GSR's (Graduate Student Researcher)
 - ▶ Paid through PPS
 - ▶ Paid under sub 60
 - ▶ Receive Tuition Remission as a benefit if effort 25%- 49.99%



Tuition & Fees vs. Tuition Remission

▶ Tuition & Fees

- ▶ Pays the exact amount of Tuition & Fees charged for a specific student
- ▶ Considered “free” “scholarship” money
- ▶ Varies per student based on residency

▶ Tuition Remission

- ▶ Benefit of employment (sub 6 on ledger)
- ▶ Blended rate of Tuition & fee rates across all GR student rates
- ▶ Ensures that residents and non-residents are treated equally when charged to research awards

Visiting Scholars and Participants

- ▶ Visiting Scholars are supported by their home institution
- ▶ Non-UC Visiting Graduate Student Employment
 - ▶ Salaried Visiting Graduate Student - Title Code 3330 - Junior Specialist
 - ▶ A salaried VGS may receive partial or full support from their UCSD faculty sponsor via the Junior Specialist Title (Title Code 3330). Approval for this title must be requested in advance by submitting an appointment to the Graduate Division.
 - ▶ Cannot be supported on Federal funds
- ▶ Participants may receive stipends through MyPayments
 - ▶ Use account code 637550
 - ▶ No special 77/78 program/index is needed

Training Summary

TRAINING	TITLE CODE	PROGRAM	ACCOUNT CODES	BENEFITS (66XXXXXX)	HOW PAID
Undergraduate	N/A	77xxxx	637566 TUITION & FEES 637560 STIPENDS/NSF R/E UNDERGRAD 637550 PRE & POST DOC STIPENDS	None	SAM
Predoc/Graduate	N/A	780050 780030	637566 TUITION & FEES 637550 PRE & POST DOC STIPENDS 637564 PRE-DOC STUDENT HEALTH INS PLAN	None	SAM
Postdoc	3253 POSTDOC-FELLOW 3254 POSTDOC-PAID DIRECT	780030	637550 PRE & POST DOC STIPENDS	PSBP 668710 Dental Ins 668720 Health Ins 668730 Visions Ins 668740 Disability Ins 668750 Life Ins* 668760 Broker Fees 668500 State Workers Comp Ins* *not allowable on training grants and fellowships	PPS MYPAYMENTS
Participants	N/A	44/40	63xxxx	None	MYPAYMENTS SAM (if students)

Employment Summary

EMPLOYMENT	TITLE CODE	PROGRAM	ACCOUNT CODES	BENEFITS (66XXXX)	HOW PAID
Undergraduate	N/A	44/40	62xxxx	None	PPS
Predoc/Graduate	GSR	44/40	60xxxx	668970 TUITION FEE REMISSION	PPS
	3262 - CSE				EFFORT 25% - 49.99%
	3263 - MAE				
3264 - SE					
3284 - General			NO TUITION FEE REMISSION	EFFORT < 25%	
3285 - ECE					
3286 - Physics					
3287 - SIO					
3266 - GSR NO REM			NO TUITION FEE REMISSION	EFFORT <=49.99%	
Postdoc	3252 POSTDOC-EMPLOYEE	44/40	60xxxx	PSBP	PPS
	3254 POSTDOC-PAID DIRECT			668710 Dental Ins 668720 Health Ins 668730 Visions Ins 668740 Disability Ins 668750 Life Ins 668760 Broker Fees 668500 State Workers Comp Ins	MYPAYMENTS

Resources

- ▶ Financial Aid Office
 - ▶ <http://fao.ucsd.edu>
- ▶ Graduate Division, Financial Support
 - ▶ <http://grad.ucsd.edu/financial/index.html>
- ▶ REU:
 - ▶ <http://blink.ucsd.edu/finance/awards/managing/sponsored/nsf-reu-payment-process.html>
- ▶ Coming in March 2016: START Training tool (OPAFS)

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Participants	N/A	44/40	63xxxx	None	MYPAYMENTS SAM (if students)

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EMPLOYMENT	TITLE CODE	PROGRAM	ACCOUNT CODES	BENEFITS (66XXXX)	HOW PAID
Undergraduate	N/A	44/40	62xxxx	None	PPS
Predoc/Graduate	GSR 3262 - CSE 3263 - MAE 3264 - SE 3284 - General 3285 - ECE 3286 - Physics 3287 - SIO 3266 - GSR NO REM	44/40	60xxxx	668970 TUITION FEE REMISSION NO TUITION FEE REMISSION Summer appointment - NO TUITION FEE REMISSION	PPS EFFORT 25% - 49.99% EFFORT < 25% EFFORT <=49.99%
Postdoc	3252 POSTDOC-EMPLOYEE 3254 POSTDOC-PAID DIRECT	44/40	60xxxx	PSBP 668710 Dental Ins 668720 Health Ins 668730 Visions Ins 668740 Disability Ins 668750 Life Ins 668760 Broker Fees 668500 State Workers Comp Ins	PPS MYPAYMENTS
Visiting Graduate Student	3330 JUNIOR SPECIALIST	Non Federal Research Awards - (NO ECERT)	62xxxx	EFFORT < 43.75% - NO BENEFITS	PPS