Payments to Students on Research Awards

February 23, 2016
Vonda Garcia-Financial Aid Office
Kathryn Murphy-Graduate Division, Financial Support Unit
Marissa Yessis-OPAFS
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 sheet include:
   - Student Names, PID/ID# (State with $). Amount per student, Month or Quarter to be paid
   - 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 check or direct deposit (if the student signed up for direct deposit) within 5 working days after the award posts. Awards $1,001 or greater will be paid every quarter unless otherwise stated below.

A scholarship might displace other financial aid for Financial Need recipients. A Summer Scholarships (July, Aug., early Sept.) generally do not displace a student's financial aid.

Students should always compare changes to their financial aid with a Financial Aid Office Counselor.

Questions: (858) 534-1997 scholarship@ucsd.edu

Office Use: Aid ID code: Fiscal Year: 2015-2016

<table>
<thead>
<tr>
<th>Name of Scholarship</th>
<th>Request Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coordinator Name</td>
<td>Ext. Email</td>
</tr>
</tbody>
</table>

Dept: Mail Code: IFOPAL: Index # Fund # Account # 837272 Or Acct # 9919162

Organization # 77 Program # 77

- ( ) Scholarship pays in one lump sum. Indicate payment month:
- Total Fiscal Year Budget $ 5
- Maximum Award Per Student $ 5
- Enrollment Required to Pay? ( ) No enrollment required. ( ) Full Time, ( ) Half Time, ( ) less than half-time
- Funding Source ( ) JUCCP, ( ) JUCSD, ( ) Federal, ( ) State, ( ) Outside agency/Donor/Other
- Type of Gov't ( ) Current, ( ) Endowment, ( ) Grant
- Did UCSD Development Office Solicited Funds? ( ) Yes ( ) No
- Recipient Selections Made By: ( ) UCSD, ( ) Outside Agency, ( ) Other
- Indicate if these criteria were used for Selection
- ( ) Financial Need, ( ) Under-Represented Student
- Additional Selection Criteria (e.g. Major, GPA, Grade Level, Other)

UCSD, CA 92093-1098 / APRIL 2015 / AID ID 3-15-15
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

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>UCSD Cost</td>
<td>$31,365</td>
</tr>
<tr>
<td>Grant Aid (Pell, CAL, UC Grant)</td>
<td>($17,565)</td>
</tr>
<tr>
<td>UCSD Net Cost</td>
<td>$13,800</td>
</tr>
</tbody>
</table>

**Family / Student Contributions to Meet Net Cost**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Student Portion</strong></td>
<td></td>
</tr>
<tr>
<td>Student Loans</td>
<td>$5,900</td>
</tr>
<tr>
<td>Work-Study or Other Employment</td>
<td>$2,900</td>
</tr>
<tr>
<td>Parent Contribution per FAFSA</td>
<td>$5,000</td>
</tr>
</tbody>
</table>

*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 TAships, GSRships). 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

<table>
<thead>
<tr>
<th>Training</th>
<th>Title Code</th>
<th>Program</th>
<th>Account Codes</th>
<th>Benefits (66xxxx)</th>
<th>How Paid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate</td>
<td>N/A</td>
<td>77xxxx</td>
<td>637566 tuition &amp; fees</td>
<td>None</td>
<td>SAM</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>637560 stipends/nsf r/e undergrad</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>637550 pre &amp; post doc stipends</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Predoc/Graduate</td>
<td>N/A</td>
<td>780050</td>
<td>637566 tuition &amp; fees</td>
<td>None</td>
<td>SAM</td>
</tr>
<tr>
<td></td>
<td></td>
<td>780030</td>
<td>637550 pre &amp; post doc stipends</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>637564 pre-doc student health ins plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Postdoc</td>
<td>3253</td>
<td>780030</td>
<td>637550 pre &amp; post doc stipends</td>
<td>PSBP</td>
<td>PPS</td>
</tr>
<tr>
<td></td>
<td>POSTDOC-FELLOW</td>
<td></td>
<td></td>
<td>668710 dental ins</td>
<td>MYPAYMENTS</td>
</tr>
<tr>
<td></td>
<td>3254</td>
<td></td>
<td></td>
<td>668720 health ins</td>
<td></td>
</tr>
<tr>
<td></td>
<td>POSTDOC-PAID DIRECT</td>
<td></td>
<td></td>
<td>668730 visions ins</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>668740 disability ins</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>668750 life ins*</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>668960 broker fees</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>668500 state workers comp ins*</td>
<td></td>
</tr>
<tr>
<td>Participants</td>
<td>N/A</td>
<td>44/40</td>
<td>63xxxx</td>
<td>None</td>
<td>SAM</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>(if students)</td>
</tr>
</tbody>
</table>
# Employment Summary

<table>
<thead>
<tr>
<th>EMPLOYMENT</th>
<th>TITLE CODE</th>
<th>PROGRAM</th>
<th>ACCOUNT CODES</th>
<th>BENEFITS (66XXXX)</th>
<th>HOW PAID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate</td>
<td>N/A</td>
<td>44/40</td>
<td>62xxxx</td>
<td>None</td>
<td>PPS</td>
</tr>
</tbody>
</table>
| 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  
NO TUITION FEE REMISSION | PPS  
EFFORT 25% - 49.99%  
EFFORT < 23%  
EFFORT <=49.99% |             |
| Postdoc       | 3252 POSTDOC-EMPLOYEE | 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 |
Resources

- Financial Aid Office
  - http://fao.ucsd.edu
- Graduate Division, Financial Support
  - http://grad.ucsd.edu/financial/index.html
- REU:
- Coming in March 2016: START Training tool (OPAFS)
<table>
<thead>
<tr>
<th>TRAINING</th>
<th>TITLE CODE</th>
<th>PROGRAM</th>
<th>ACCOUNT CODES</th>
<th>BENEFITS (66XXXXX)</th>
<th>HOW PAID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate</td>
<td>N/A</td>
<td>77xxxx</td>
<td>637566 TUITION &amp; FEES</td>
<td>None</td>
<td>SAM</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>637560 STIPENDS/NSF R/E UNDERGRAD</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>637550 PRE &amp; POST DOC STIPENDS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Predoc/Graduate</td>
<td>N/A</td>
<td>780050</td>
<td>637566 TUITION &amp; FEES</td>
<td>None</td>
<td>SAM</td>
</tr>
<tr>
<td></td>
<td></td>
<td>780030</td>
<td>637550 PRE &amp; POST DOC STIPENDS</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>637564 PRE-DOC STUDENT HEALTH INS PLAN</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Postdoc</td>
<td>3253 POSTDOC-FELLOW</td>
<td>780030</td>
<td>637550 PRE &amp; POST DOC STIPENDS</td>
<td>PSBP</td>
<td>PPS</td>
</tr>
<tr>
<td></td>
<td>3254 POSTDOC-PAID DIRECT</td>
<td></td>
<td></td>
<td>668710 Dental Ins</td>
<td>MYPAYMENTS</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>668720 Health Ins</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>668730 Visions Ins</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>668740 Disability Ins</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>668750 Life Ins*</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>668760 Broker Fees</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>668500 State Workers Comp Ins*</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>*not allowable on training grants and fellowships</td>
<td></td>
</tr>
<tr>
<td>Participants</td>
<td>N/A</td>
<td>44/40</td>
<td>63xxxx</td>
<td>None</td>
<td>MYPAYMENTS</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>SAM (if students)</td>
<td></td>
</tr>
</tbody>
</table>
## EMPLOYMENT SUMMARY

<table>
<thead>
<tr>
<th>EMPLOYMENT</th>
<th>TITLE CODE</th>
<th>PROGRAM</th>
<th>ACCOUNT CODES</th>
<th>BENEFITS (66XXXX)</th>
<th>HOW PAID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate</td>
<td>N/A</td>
<td>44/40</td>
<td>62xxxx</td>
<td>None</td>
<td>PPS</td>
</tr>
</tbody>
</table>
| 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                           | PPS       |
|                             |                  |         |               | NO TUITION FEE REMISSION                               | EFFORT 25% - 49.99% |
|                             |                  |         |               | Summer appointment - NO TUITION FEE REMISSION          | EFFORT < 25% |
|                             |                  |         |               |                                                       | EFFORT <=49.99% |
| Postdoc                     | 3252 POSTDOC-EMPLOYEE | 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       |
|                             | 3254 POSTDOC-PAID DIRECT |        |               |                                                       | MYPAYMENTS |
| Visiting Graduate Student   | 3330 JUNIOR SPECIALIST | Non Federal Research Awards - (NO ECERT) | 62xxxx | EFFORT < 43.75% - NO BENEFITS | PPS       |