

UC DAVIS

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UC DAVIS GRADUATE STUDIES PRESENTS

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# GRADUATE STUDENT **ORIENTATION**

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**#UCDAVISGSO**

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**NAVIGATING UNIVERSITY FUNDING  
FINANCING YOUR GRADUATE EDUCATION**

September 20, 2017

# TODAY'S AGENDA

- **Introductions**
- **Financial Systems**
- **Cost**
- **Types of funding**
  - Internal fellowships
  - External fellowships
  - Academic appointments
  - Student loans
- **Tax teaser**
- **Reminders**
- **Questions? (in the lobby during lunch)**



# Types of Funding

## How to fund your Graduate Education?

- Fellowships
- Academic Appointments
- Student Loans
- Personal Resources



# Why does this presentation apply to you?

Differing types of student financial support 2015-16:

Description	Number of Students	Percentage of \$	Amount
Fellowship Stipends			\$21,625,955.66
Tuition & Fee Fellowships			\$8,338,217.52
NRST Fellowships			\$11,268,947.74
<b>Total Fellowship \$</b>	2,797	28%	<b>\$41,233,120.92</b>
GSR Salary			\$20,217,287.70
GSR Tuition & Fee Remission			\$20,966,199.69
GSR NRST Remission			\$3,189,378.00
<b>Total GSR Support \$</b>	1,935	31%	<b>\$44,372,865.39</b>
TA Salary			\$29,551,485.67
TA Remission			\$24,715,891.72
<b>Total TA Support \$</b>	2,471	37%	<b>\$54,267,377.39</b>
<b>Loans</b>	396	4%	<b>\$5,439,558.94</b>
<b>Total</b>			<b>\$145,312,922.64</b>

Percentage of students who receive mixed support (any combination of fellowship, academic appointment, and/or loan) is above 50%

# Graduate Student Financial Support

- **Responsibilities**

- Assist with the entire fellowship process from:
  - Finding & applying for fellowships
  - Post award administration
- We oversee the process of awarding fellowships
- Provides training & support for the program staff

- **Student Support team**

- Steven Albrecht – Director
- Lisa Finnegan – Graduate Student Support Specialist
- Ruth Lee - Internal Fellowship Adviser
- Maria Garcia – External Fellowship Adviser

## Other UCD departments

- **Your Graduate Program**
  - Your Graduate Program Academic Advisors and Program Coordinators should be your first contact point for any funding questions you may have.
- **Graduate & Undergraduate Departments**
  - Are responsible for hiring you for all academic appointments and processing all of the associated payroll paperwork (including payroll direct deposit)
- **Student Accounting**
  - Collects your payments and disburse your stipends and refunds that are paid through Banner (fellowship stipends for non-US Citizens paid via payroll).
  - Located in Dutton Hall, 2<sup>nd</sup> floor.
  - <http://studentaccounting.ucdavis.edu>

# Other important UCD departments

- **Payroll Department:**

Students with academic appointments (job) or international students receiving a fellowship stipend; your paycheck or stipend is processed through the payroll department. If you have direct deposit, your check or notice is delivered to your home department.

- **The Financial Aid Office:**

Responsible for administering and processing your financial aid including loans and work study employment - located in Dutton Hall, first floor.

- **The Registrar's Office:**

CA Residency for Tuition Purposes

- <http://registrar.ucdavis.edu/tuition/residence/index.cfm>

Class Schedule and Registration Guide

- <http://registrar.ucdavis.edu/csrg/>

- **Services for International Students and Scholars:**

A major role for SISS is to assist international students, scholars and UC Davis departments with visa and immigration issues. SISS also provides orientation, assistance, information, and referral to international students regarding financial, personal, cultural, and academic concerns.

- <http://siss.ucdavis.edu>



# Online Financial Applications and Systems

- **Banner**

- The BANNER Student Information System is a computerized database of UC Davis student information organized into several modules, including Admissions, Registration, Billing/Accounts Receivable, Financial Aid, and Graduate Student Data.
- Feeds SISWEB & MyBill

# Online Financial Applications and Systems


- **Student Information System (SISWEB):**
  - <http://sisweb.ucdavis.edu/>
  - print your unofficial academic record
  - change your address
  - **enter your Social Security Number**
    - go to “Personal Information”, and click the “Report SSN” link
  - view your account – can see current balance at any time
  - view your financial aid status
- **SISWEB or Schedule Builder**
  - enroll in classes
  - adjust your class schedule
  - view and print your class schedule

# Online Financial Applications and Systems

- **MyBill:** <https://mybill.ucdavis.edu>
  - Check your student account balance
  - Make payments
  - Store your payment methods
  - Set up your parents and/or other persons to view and/or pay your bill online
  - How to make payments:  
[http://afs.ucdavis.edu/our\\_services/cashier-e-payment-solutions-office/for-students/index.html](http://afs.ucdavis.edu/our_services/cashier-e-payment-solutions-office/for-students/index.html)
  - Students are responsible for viewing the most up-to-date status of their student account via the **Recent Account Activity screen on MyBill** and/or **SISWEB**

# Student Financial Applications and Systems

- **Reading the Student Billing Statement**
- [http://afs.ucdavis.edu/our\\_services/student-accounting/fees-e-payments/my-bill/reading-the-student-bill.html](http://afs.ucdavis.edu/our_services/student-accounting/fees-e-payments/my-bill/reading-the-student-bill.html)

 <b>UC DAVIS</b> UNIVERSITY OF CALIFORNIA		<b>University of California, Davis</b> One Shields Avenue Davis, CA 95616 (530) 752-3646 <a href="http://studentaccounting.ucdavis.edu">http://studentaccounting.ucdavis.edu</a>	
Sacramento, CA 95826 United States of America		Student ID:	
<b>Payment Information</b>		<b>Account Summary</b>	
Payment due date: <b>1</b>	09/15/2011	Previous Balance: <b>4</b>	\$0.00
Amount due: <b>2</b>	\$0.00	Payments and Credits: <b>5</b>	\$-100.00
<b>Important Information</b>		Purchases and Adjustments: <b>6</b>	\$5,211.12
Student fees are due September 15, 2011. UG students that do not pay Student fees and all prior debt will be dropped from classes on Sept 16. Registration freeze: Sept 16-19. If you would like to enroll into the DPP please visit <a href="http://sisweb.ucdavis.edu">http://sisweb.ucdavis.edu</a> .		Estimated Financial Aid: * <b>7</b>	\$-8,036.00
<b>3</b>		Amount Deferred: <b>8</b>	\$0.00
		New Total Balance: <b>9</b>	\$-2,924.88

# Online Financial Applications and Systems

- **Direct Deposit**

- Payments made to students, through Banner and Payroll, are eligible for direct deposit service:  
<https://afsapps.ucdavis.edu/direct-deposit/>
- No paper statements, all notification via email.

 Welcome to UC Davis Online Direct Deposit

**Employee Reimbursement and Student Refunds**

Sign in to Direct Deposit [HERE](#)

**Employee Payroll Earnings**

Sign in to AYSO [HERE](#)

## AggieCard

- Official UC Davis identification card
- <http://registrar.ucdavis.edu/records/aggiecard.cfm>

# Online Financial Applications and Systems

- **Free Application for Federal Student Aid (FAFSA)** at <http://www.fafsa.ed.gov>
- **California Dream Act Application** at <https://dream.csac.ca.gov/>
  - The application to determine your financial need to determine your eligibility for educational loans.
  - You will receive a Student Aid Report (SAR) that provides you with an Expected Family Contribution (EFC).
- **MyAwards**  
<http://financialaid.ucdavis.edu/myawards/>
  - Continuing or new students with a valid Student Aid Report (SAR) will be able to view your UC Davis aid package and requirements using MyAwards.

# Online Financial Applications and Systems

- **GLACIER Nonresident Tax Compliance System:**  
<http://afs.ucdavis.edu/systems/glacier/index.html>
  - GLACIER is a secure online Nonresident Alien (NRA) tax compliance system that foreign visitors use to provide their immigrant and tax data to UC Davis. GLACIER helps determine tax residency, withholding rates, and income tax treaty eligibility. GLACIER also manages NRA paperwork, maintains NRA data, and prepares tax forms and required statements.
  - If you need to access GLACIER, you will receive an email from UC Davis Tax Accounting.

# Calendar

- Published payment due date for fall 2017-18 Tuition & Fees is September 15<sup>th</sup>
- For Graduate Students: If your account balance is not paid by the 8<sup>th</sup> week of the quarter (**November 16<sup>th</sup>**):
  - \$110 late fee will be charged
  - You will be dropped from winter classes
  - Or, if you haven't registered, a hold will be placed on winter enrollment
  - <https://registrar.ucdavis.edu/calendar/fees.cfm>
  - <https://registrar.ucdavis.edu/tuition/non-payment.cfm#u-graduate>



# Graduate Student Tuition & Fees 2017-18

## 2017-18 Graduate CA resident Tuition & Fees

- Total = **\$17,891.26**
- We have held graduate Tuition and the Student Services Fee to a 3.6% increase since 2011-12 (\$12,192 to \$12,630)

## 2017-18 Graduate Nonresident Tuition & Fees

- \$17,891.26 Tuition & Fees
  - \$15,102.00 Nonresident Supplemental Tuition (NRST)
  - We have not increased graduate NRST since 2004-05
  - Total = **\$32,993.26**
- Student Fee and Tuition Overviews – Descriptions and Uses:
    - [http://budget.ucdavis.edu/factsheet/current\\_graduate\\_student\\_fees\\_fact\\_sheet.pdf](http://budget.ucdavis.edu/factsheet/current_graduate_student_fees_fact_sheet.pdf)
    - <http://budget.ucdavis.edu/studentfees/reports/student-fee-overview.pdf>

# Graduate Student Fees 2017-18

<b>Graduate Student Fees</b>	<b>Fall</b>	<b>Winter</b>	<b>Spring</b>	<b>Total</b>
GSA Fee	\$17.40	\$17.40	\$17.40	\$52.20
Memorial Union Fee	\$28.50	\$28.50	\$28.50	\$85.50
Facilities and Campus Enhancements Fee	\$142.61	\$142.61	\$142.61	\$427.83
Campus Expansion Initiative	\$65.48	\$65.48	\$65.48	\$196.44
Student Facilities Safety Fee	\$22.00	\$22.00	\$22.00	\$66.00
Student Services Health Fee	\$49.77	\$49.76	\$49.76	\$149.29
Health Insurance (UC SHIP)	\$1,428.00	\$1,428.00	\$1,428.00	\$4,284.00
Student Services Fee	\$376.00	\$376.00	\$376.00	\$1,128.00
Tuition	\$3,834.00	\$3,834.00	\$3,834.00	\$11,502.00
<b>Subtotal - Graduate fees 2017-18</b>	<b>\$5,963.76</b>	<b>\$5,963.75</b>	<b>\$5,963.75</b>	<b>\$17,891.26</b>
Nonresident Supplemental Tuition	\$5,034.00	\$5,034.00	\$5,034.00	\$15,102.00
<b>Total - Nonresidents 2017-18</b>	<b>\$10,997.76</b>	<b>\$10,997.75</b>	<b>\$10,997.75</b>	<b>\$32,993.26</b>

# 2017-18 Graduate Student Fees, not full-time enrollment

## PELP: \$70.00

Withdrawal from the university through the Planned Educational Leave Program (PELP) is available to graduate students who need to take a leave from their academic program for various reasons, including health-related issues, family crises, or to clarify educational goals. Charged to your student account.

*WARNING: If you withdraw or break registration without filing for PELP you are not guaranteed readmission.*

## Filing Fee Status: \$162.00

The Filing Fee program was established expressly to assist those students who have completed all requirements for degrees except filing theses and dissertations and/or taking final examinations and are no longer using university facilities.

<http://gradstudies.ucdavis.edu/sites/default/files/upload/files/current-students/g305-filing-fee-app.pdf> The Filing Fee is a reduced fee, paid in lieu of registration fees. It is assessed only once. You are no longer considered a full-time registered student by the university and are not entitled to the same benefits and privileges as a registered student. Not charged to your student account, pay the Filing Fee at the Cashier's Office: <http://cashier.ucdavis.edu/student/svcsfees.cfm>.

**In Absentia Registration: \$2,060 per academic quarter** (15% of Tuition & the Student Services Fee plus Health Insurance)  
Nonresident Alien students must also pay NRST (\$5,034), if applicable.

Available to regularly enrolled and registered students who have an academic need to conduct research or study outside of California for at least one full academic term. Promotes continuous enrollment of graduate and professional degree students by providing an appropriate enrollment incentive. Charged to your student account. <http://gradstudies.ucdavis.edu/current-students/admissions-academic-services/absentia-faq>

# Types of Funding

- **How to fund your Graduate Education?**
  - **Fellowships**
  - Academic Appointments
  - Student Loans
  - Personal Resources



# Fellowships & Grants

- **Fellowship** (used interchangeably with "grant")
  - The equivalent of "scholarship" in the undergraduate world, is an "award," that is "free money" with few, if any "strings attached."
  - Can be support for stipend or "living expense," fees, tuition, research, travel or any combination of these.
  - The value can be from \$500 (e.g., a travel award) to \$50,000/year.
  - Time period - can be a one-time payment, a 1-yr, 3-yr or even 5-6 yrs of support.
  - Different fellowships for different periods of your academic career, i.e., there are fellowships that you can apply for at the beginning of your graduate career, there are pre-dissertation, and dissertation research fellowships, and postdoc awards.
  - The majority are "merit based" (GPA/GRE scores/letters of reference) and there are also "need-based" (e.g. the federal criteria for financial need based on the FAFSA). There are a myriad of other eligibility factors listed in the application instructions (residency, discipline).
  - They are prestigious and make an impression on your CV. "Fellowships beget fellowships."

# Student Eligibility – Undocumented Students & California Dream Act

- AB 540
  - Not subject to nonresident supplemental tuition
  - Attended CA high school for three, or more, years and graduated
  - Residency Deputy must make determination
  - Can be undocumented (but cannot be on J-1 or F-1 Visa)
  - [http://ucop.edu/student-affairs/policies/universitywide-program-policies-and-guidelines/AB540.html#add\\_1](http://ucop.edu/student-affairs/policies/universitywide-program-policies-and-guidelines/AB540.html#add_1)
- AB 130
  - Undocumented, AB540, students qualify for UC gifts and endowments designated for scholarships by the donor.
- AB 131
  - Makes undocumented AB 540 students eligible for awards from other institutional aid funds, including Tuition & Fee revenue.

## Fellowships & Grants

- **Timing**

- Must look for funding every year at least a year in advance
- Many application deadlines are in the fall for the next academic year (fall 2017 application deadline to receive funding for the school year starting in fall 2018)
- Offers often made in Feb, March, April
- The graduate student is, in many cases, a “commodity.”  
Negotiate for your support – use your external fellowship as a bargaining tool

## Internal Fellowships

- **Internal Fellowships are funds controlled by UC Davis**
  - **Graduate Program Fellowship Allocation**
    - Fellowship funds allocated to the Graduate Programs
    - Processed by your Graduate Program Coordinator (return award letters to your program)
  - **Restricted Endowments**
    - Gifts for fellowships targeted to specific student populations
    - Processed by the Office of Graduate Studies
  - **Travel Awards**
    - Offered twice/year in Oct (for travel from July - June) & March (for travel from January - December)



# Continuing Student Internal Fellowship Competition

- **Deadlines**

- **January 15<sup>th</sup>:** Fellowship applications from continuing students through our online application form.
  - Letters of reference should be submitted by January 22, 2018
- **February 05<sup>th</sup>:** Graduate Programs forward nominations for continuing students to the Office of Graduate Studies
- **March:** The Office of Graduate Studies begins emailing offer letters to students; copies are sent to graduate programs.
- **If you did not win:** Because we award fellowships through October (due to funding timing), you will not receive notification that you did not win.

# Internal Fellowships

Fellowship Name	Eligible
Cota Robles, Eugene	Prospective
Elliott, Marjorie and Charles	Prospective
Gibeling, Jeffery and Marsha	Prospective
Graduate Scholars Fellowship	Prospective
IRT Undergrad Preparation	Prospective
Jones, Fletcher	Prospective
Kraft, Herbert	Prospective
McNair	Prospective
NIH Undergrad Preparation (RISE, NIGMS, MARC U-STAR)	Prospective
NSF Undergrad Preparation (LSAMP, UC CAMP)	Prospective
Provost's First Year Fellowship	Prospective
Schwall Medical Fellowship, Floyd and Mary	Prospective
Steindler, John F	Prospective
Vanderhoef Int'l Grad Student Fellowship	Prospective
Zolk, George and Dorothy	Prospective

Fellowship Name	Eligible
Bilinski, Russell & Dorothy Educational Foundation	Continuing
Crosby, Donald	Continuing
Dissertation Year Fellowship	Continuing
Faulkner, Richard and Kate	Continuing
Foin, Theodore and Angela	Continuing
Gibeling, Alfred H. & Marie E.	Continuing
Ellen Gold Epidemiology	Continuing
Golden International Agriculture, William G. and Kathleen	Continuing
Graduate Research Mentorship	Continuing
Hillyer, Ted and Silvia	Continuing
Jacobsen, Stanley & Werner, Emily	Continuing
Krantz, Bert and Nell	Continuing
Lee, George	Continuing
Lyons, Austin Eugene	Continuing
Mahan, Laura Perrott	Continuing
McArthur, Frank	Continuing
McKeehan, Beatrice Oberly and S. Atwood	Continuing
Richards, Lillie May	Continuing
Saxon, Leland Roy & Georgia Wood	Continuing
Schwalen, Emily	Continuing
Schwall Dissertation Year Fellowship, Floyd and Mary	Continuing
James and Rita Seiber Int'l Grad Student Fellowship	Continuing
Stacey, Malcolm	Continuing
Telford, Tara K.	Continuing
Tryon, Herbert	Continuing
Provost's Dissertation Year Fellowship	Continuing
UCD & Humanities Graduate Research	Continuing
UCD Dissertation Year Fellowship	Continuing
Velez, Miguel	Continuing
Walker, Frank and Carolan	Continuing
Wood, Elizabeth P.	Continuing
Wright, Jarena	Continuing

# Internal Fellowship Application Process

- 58 restricted endowment fellowships for Continuing Students (**11 open to Nonresident Alien students**)
  - Application and descriptions of each fellowship:  
<http://www.gradstudies.ucdavis.edu/ssupport/continuingfellowships.html>
  - Approximately 130 awards (range from \$1,500 research allowance to \$70,000 multi-year award)
- Required Application Materials
  - 2 Essays (statement of purpose & personal history statement)
  - 3 Letters of Recommendation
  - Biographical Data

Description	Stats
Total number of unique students nominated	352
Total number of programs who nominated students	66
Average number of students nominated per program	5
Number of fellowships awarded (cont. only)	137

# Internal Fellowship Formula

## •Factors:

- GPA
- Graduate Studies Internal Fellowship Reviewer Committee faculty member Rating (2)
- Program Rank

## •Continuing student formula:

- $(\text{GPA score} + \text{Reviewer1 score} + \text{Reviewer2 score} + 2 * \text{Program Rank Score}) / 5 = \text{Fellowship score}$

Faculty reviewers are assigned to students in their same broad field (Humanities, Social Sciences, and Engineering), but not from their exact major discipline, and via stratified randomization.

## Travel Awards

- Offered twice/year in Oct (for travel from July - June) & March (for travel from January - December)
  - Nominations due to OGS November 15<sup>th</sup> and April 15<sup>th</sup>
  - Awards announced the week of December 15<sup>th</sup> and May 15<sup>th</sup>
- Students may only win once
- Award amount varies by destination (\$500 for CA, \$1,000 CONUS, or \$1,500 OCONUS)
- \$25,000 awarded twice per year
- Three nominations allowed per Grad Program
- Application form and instructions here:  
[http://www.gradstudies.ucdavis.edu/ssupport/internal\\_travel.html](http://www.gradstudies.ucdavis.edu/ssupport/internal_travel.html)
- Different from the GSA Travel Award -  
<https://gsa.ucdavis.edu/funding/travel-awards/>

# Internal Fellowships

- **Tuition & Fee Fellowships**

- Tuition & Fee fellowships may include only those University and campus fees that are required of all students (<http://budget.ucdavis.edu/studentfees>).
- Miscellaneous fees such as those for PELP, Filing Fee, advancement to candidacy, course materials, SISS services, library charges, health center charges, late fees, the \$150 Document Fee, etc. may not be paid on behalf of students as a fee fellowship. Those fees are wholly the responsibility of the student.
- If your Tuition & Fee and/or NRST charges are reduced, your award or remission must also be reduced. You cannot receive a refund for a Tuition & Fee or NRST over-award.
  - This most commonly happens when students opt-out of UC SHIP after the fee payment has posted.

# Internal Fellowships

- **UC Student Health Insurance Plan**

- <http://shcs.ucdavis.edu/insurance>
- The UC Regents mandates that all students have health insurance. UC Davis automatically enrolls all registered students in the UC Student Health Insurance Plan (UC SHIP).
- If students have comparable insurance and do not want to be enrolled in UC SHIP, they must apply for a waiver.
- If the waiver is approved, the student's Tuition & Fee charge will be reduced by the amount of UC SHIP (\$1,448 per quarter for 2017-18).
- If full Tuition & Fees were paid on the student's behalf via fellowship or academic appointment remission prior to the waiver approval, the Tuition & Fee reduction could generate a refund in error. This is considered an over-award and the refund must be repaid.
- **To avoid an over-award, report your intent to opt out of UC Ship at your earliest convenience.**

# Graduate Student Fees 2017-18

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# Internal Fellowships

- **Nonresident Supplemental Tuition (NRST) Programs**
  - **UCOP NRST Waiver Program**
    - NRST is automatically waived for doctoral students for the first three calendar years post-candidacy.
  - **UC Davis Post-candidacy NRST Fellowship Program**
    - After the UCOP NRST Waiver period, nonresident doctoral students are again charged NRST until they complete their degrees.
    - The Post-candidacy Nonresident Supplemental Tuition Fellowship Program is a non-competitive fellowship program that covers the cost of NRST during the fourth and fifth years after advancement to candidacy.

## External Fellowships

- Are offered from outside, non-campus, agencies: non-profits, state and federal government, private foundations.
  - NIH, NSF, USDE, EPA, DOT, NASA
  - Private organizations, e.g. Howard Hughes Foundation, Hertz, Packard Foundation,
  - Non-profit Groups: American Heart, American Lung, American Cancer, Nat'l Physical Science Consortium
  - INTERNATIONAL Opportunities: Fulbright, Social Science Research Council
  - Diversity Fellowships: Ford Foundation Minority Fellowships, UNCF - Merk, NASA

# External Fellowships

- **Success – UC Davis currently maintains about \$11.4 million in external fellowships (\$2.5 million is for post-docs)**
  - FEDERAL FELLOWSHIPS:
    - NSF GRFP – 128 fellows, 3.7 million annual and 12 million in the next three years.
    - EPA STAR Fellowship – 7
    - Fulbright U.S. Student Program - 3
    - NSF Doctoral Dissertation Research Improvement Grant (DDRIG) and the (DDIG) – 14
    - NIH NRSA 18 (11 predoc and 7 postdoc)
    - NASA Earth Sciences Fellowship (3)
    - USDA Borlaug Fellowship (3)
    - USDA NIFA – 9 (2 predoc, 7 postdoc)
    - USDE Fulbright-Hays - 1
    - U.S. DOT/DOD - 2

# External Fellowships

- **Success – UC Davis currently maintains about \$11.4 million in external fellowships (\$2.5 million is for post-docs)**
  - PRIVATE | NON-PROFIT FOUNDATIONS:
    - ARCS (Achievement Reward for College Scientists – 12
    - American Assoc of University Women - 1
    - American Society for Engineering – 3
    - American Heart Associations – 6
    - Ford Foundation Predoctoral, Dissertation and Postdoctoral - 1
    - Howard Hughes Medical Institute – 2
    - National Physical Science Consortium – 2
    - Social Science Research Council – 2
  - INTERNATIONAL STUDENT FELLOWSHIPS
    - Various governments: China, Korea, Taiwan, etc.
    - UC Mexus/Becas/CONICYT/CONACYT/Fulbright – 30+
    - Vietnam Foundation – 10

# External Fellowships

- **Application Process**

- The Student applies directly as the Principal Investigator (P.I.) to the agency following the agency's guidelines and application instructions - although institutional support is often required.
- Institutional Support: Signature and/or endorsement from the affiliate university is often required, i.e., the student's faculty mentor, chair, or an institution official might need to sign the application, offer a letter of support, or submit the application online.
- If UC Davis institutional support required, student must complete External Fellowship/Grant Application Data Form and obtain required signatures:  
<https://grad.ucdavis.edu/current-students/financial-support/external-fellowships/apply-external-fellowship>

- **Resources for External Support**

- Subscribe to the Funding Announcement Listserv:  
<https://lists.ucdavis.edu/sympa/info/gradfund?ticket=ST-1749689-1tcpdxTc37b0G0UhvGRH-casweb8>
- Self-serve Online Search Engines
- <https://grad.ucdavis.edu/current-students/financial-support/external-fellowships/external-support-resources>

# External Fellowships

- **Required Application Materials**
  - Campus Forms (if institutional signature required)
  - Basic Data Information
  - Statement of Research Goals or Planned Study
  - CV (Curriculum Vitae - an academic resume)
  - Letters of Reference
  - Copies of Transcripts
  - Listing of Publications, Presentations & Posters, and Fellowships received
  - Affiliate Letter (sometimes)
  - Certification & Protocols (Responsible Conduct of Research)
    - Human Subjects
    - Hazardous Materials
    - Vertebrate Animals
    - Ethics

# Fellowship Essays

- All different. Answer the stated question or instructions
- Well expressed essays that demonstrate your motivation, creativity and insight
- A realistic research plan with specific aims and methods that targets a significant problem or need and is backed by the literature/previous findings
- The judging process is subjective. Reviewers read through hundreds of applications as quickly as possible
  - engage the reader with a unique story
  - demonstrate application of knowledge & skills
  - write clearly, concisely, and specifically
  - avoid jargon; avoid acronyms; use active voice
  - have consistent format and adhere to guidelines for content, outline or length
  - essays should be free of typos and grammatical errors
- Have peers unfamiliar with your work read for clarity
- Allow ample time for peer/tutor review & feedback on early drafts. Revise, revise, revise...

# Letters of Reference

- Network and Build Relationships with faculty
  - Research experience beyond courses
- Ask, “Can you write me a strong, positive, detailed, letter of reference for a fellowship?”
  - Give them the opportunity to decline
- Confirm deadline for obtaining reference letters.
  - Ask at least a month in advance!
  - Provide them with a CV, draft proposal, personal statements, etc.
- Reference letters may need to be sent directly from mentors (electronic submission).
  - Reminder or “thank you note” near the due date
  - Confirm they were submitted and received



## External Fellowships - *Guidelines for Payment*

Step	Action	Owner
1	Circulate Award Notice to all parties (Student, Student's Major Professor, Graduate Program Coordinator, and Office of Graduate Studies)	Awarding Agency (then Student, or Grad Program, or OGS)
2	Prepare Grant Transaction Form (OGS-GTF) and send to Extramural Accounting	Office of Graduate Studies
3	Initiate OP Fund number and report to Graduate Program	Extramural Accounting
4	Initiate Account(s) (FINA and/or ORES) via KFS	Graduate Program
5	Complete Banner Fund Code Request form for the FINA account and send form to the Office of Graduate Studies	Graduate Program
6	Initiate Banner Fund Code and report to Graduate Program	Office of Graduate Studies
7	Key stipend, fee, and/or NRST in Banner (Grad Track\$)	Graduate Program
8	Send funds to UC Davis	External Agency
9	Budget stipend/fee/NRST funds (to FINA account) and/or research/travel funds (to ORES account) in KFS	Extramural Accounting
10	Process research and/or travel expenses to ORES account	Student and Graduate Program

# Matching Commitments for External Fellowships

- The Office of Graduate Studies, in partnership with the graduate programs, provides matching commitments to encourage students to compete successfully for external awards.
- Matching commitments refers to the use of campus funds to supplement graduate student support that is provided by an external sponsor. With increasing frequency, external agencies are limiting the amounts of the Tuition & Fee payments that are provided. Thus the primary purpose of the Graduate Studies matching commitment policy is to address this shortfall.
- Matching commitments are usually arranged by graduate program staff contacting the Office of Graduate Studies on the student's behalf. Students should notify their programs when they receive an external award so the faculty and staff can work with Graduate Studies to furnish the student with an appropriate level of funding.
- <http://gradstudies.ucdavis.edu/current-students/financial-support/external-fellowships/matching-commitments>

# Regulations for Receiving Fellowships

- Must report changes in major, program, below minimum GPA, reduction in enrollment units, additional funding, or multiple Tuition & Fee awards (GSR or TA remission), etc.
- Must be enrolled in, and maintain, 12 units each quarter
- Not eligible for fellowships if on PELP (Planned Educational Leave Program) or Filing Fee status (non-registered status when in the last stages of your degree)
- In order to be paid a fellowship, graduate students must have an eligible citizenship status (US Citizen, Permanent Resident, F1 or J1 Visa, California AB 540). Fellowship offers made to students without an eligible citizenship status will be void.
- Minimum GPA of 3.0 (on a 4.0 scale) and maintain satisfactory academic progress
- May not be able to accept multiple offers concurrently

# Types of Funding

- How to fund your Graduate Education?
  - Fellowships
  - **Academic Appointments**
  - Student Loans
  - Personal Resources



# Academic Appointments

- **Academic Appointment = Student Employment**
  - Appointment time (also called FTE or Full Time Equivalent)
    - A full-time employee is 100% and a half-time employee = 50% FTE (20 hours/week).
    - Max student appointment is 50%
    - <http://gradstudies.ucdavis.edu/faculty-staff/academic-personnel/salary-scales>
  - Minimum qualifications for being employed are:
    - Full-time, registered, graduate student (12 units)
    - 3.00 GPA (on a 4.0 point scale)
    - Student must be in good academic standing
    - Maximum Length of Service restrictions = 15 quarters for teaching titles and 18 quarters for research titles

# Student Eligibility – Undocumented Students & California Dream Act

- Federal “Deferred Action for Childhood Arrivals (DACA)”
  - Undocumented persons allowed to apply for a Employment Authorization Document (work permit).
  - If they receive work permit, undocumented students can work as TA or GSR
- AB 540 and Undocumented Student Center
  - <http://undocumented.ucdavis.edu/>
- Graduate Studies info for AB 540 and Undocumented Students
  - <https://gradstudies.ucdavis.edu/undocumentedgrads>

# Academic Appointments

- **GSR = Graduate Student Researcher**

- A Graduate Student Researcher is a graduate student who performs research related to the student's degree program in an academic department or research unit under the direction of a faculty member or authorized Principal Investigator.
- First paycheck is November 01<sup>st</sup> (always a month in arrears).
- Usually includes Tuition & Fee remission and NRST remission as a benefit of employment: <https://grad.ucdavis.edu/eligibility-remission-benefit>
- GSR salaries usually follow a compensation plan and have multiple salary steps depending on the employee's level of experience and education. E.g. bachelors degree, < 1 year grad study, without extensive applicable work experience = you start at salary step 1. If you've completed your dissertation research then you could be salary step 7-10.
- For example, gross monthly pay at lowest salary step, working 25% time, is around \$815. (50% time at highest step, X, is \$3,193 per month)
- To obtain research jobs, the best way to start is to inquire within your own graduate group or department.

## Academic Appointments

- **Work Study**

- Work-study is a program for students with financial need; the federal government pays for a percentage of the costs of research employment (GSR)
- Start with your Graduate Program Coordinator
- There are a limited number of work study units available to graduate students at the university, so even if you are eligible, your program may not have the units to give you.



# Academic Appointments

- **TA = Teaching Assistant**
  - Employed by department to assist with tasks related to teaching undergraduates.
  - Usually includes partial Tuition & Fee remission:  
<https://grad.ucdavis.edu/eligibility-remission-benefit>
  - First paycheck is November 01<sup>st</sup> (always a month in arrears).
  - Students appointed to the title Teaching Assistant receive a monthly salary related to the percentage of appointment time, e.g. gross monthly pay working 25% time (10 hrs/wk) is \$1,147.
  - Each department has its own applications for Teaching Assistant positions, which you should fill out annually if you are interested in a TA position.

# Tuition & Fee Remission Summary

[http://afs.ucdavis.edu/our\\_services/student-accounting/for-departments/remission-fees.html](http://afs.ucdavis.edu/our_services/student-accounting/for-departments/remission-fees.html)

Remission for CA Residents 2017-18:						
	Quarter	Tuition & Fees		Health	NRST	Amount Student Pays
<b>GSR:</b>	Fall	\$4,485.99	+	\$1,477.77	\$0.00	\$0.00
	Winter & Spring	\$4,485.99	+	\$1,477.76	\$0.00	\$0.00
<b>TA:</b>	Fall	\$4,210.00	+	\$1,477.77	\$0.00	\$275.99
	Winter & Spring	\$4,210.00	+	\$1,477.76	\$0.00	\$275.99

# Tuition & Fee Remission Summary

[http://afs.ucdavis.edu/our\\_services/student-accounting/for-departments/remission-fees.html](http://afs.ucdavis.edu/our_services/student-accounting/for-departments/remission-fees.html)

Remission for non-residents 2017-18:						
	Quarter	Tuition & Fees		Health	NRST	Amount Student Pays
<b>GSR:</b>	Fall	\$4,485.99	+	\$1,477.77	\$5,034.00	\$0.00
	Winter & Spring	\$4,485.99	+	\$1,477.76	\$5,034.00	\$0.00
<b>TA:</b>	Fall	\$4,210.00	+	\$1,477.77	\$136.00	\$275.99 + 4,898 = 5,309.99
	Winter & Spring	\$4,210.00	+	\$1,477.76	\$136.00	\$275.99 + 4,898 = 5,309.99

# 2017-18 Graduate Student Campus Based Fees not covered by TA remission

<b>Graduate Student Fees</b>	<b>Fall</b>	<b>Winter</b>	<b>Spring</b>	<b>Total</b>
GSA Fee	\$17.40	\$17.40	\$17.40	\$52.20
Memorial Union Fee	\$28.50	\$28.50	\$28.50	\$85.50
Facilities and Campus Enhancements Fee	\$142.61	\$142.61	\$142.61	\$427.83
Campus Expansion Initiative	\$65.48	\$65.48	\$65.48	\$196.44
Student Facilities Safety Fee	\$22.00	\$22.00	\$22.00	\$66.00
Student Services Health Fee	\$49.77	\$49.76	\$49.76	\$149.29
Health Insurance (UC SHIP)	\$1,428.00	\$1,428.00	\$1,428.00	\$4,284.00
Student Services Fee	\$376.00	\$376.00	\$376.00	\$1,128.00
Tuition	\$3,834.00	\$3,834.00	\$3,834.00	\$11,502.00
<b>Subtotal - Graduate fees 2017-18</b>	<b>\$5,963.76</b>	<b>\$5,963.75</b>	<b>\$5,963.75</b>	<b>\$17,891.26</b>
Nonresident Supplemental Tuition	\$5,034.00	\$5,034.00	\$5,034.00	\$15,102.00
<b>Total - Nonresidents 2017-18</b>	<b>\$10,997.76</b>	<b>\$10,997.75</b>	<b>\$10,997.75</b>	<b>\$32,993.26</b>

# Tuition & Fee Remission Example

Fall GSR remission = \$5,963.76

## Account Details

Detail Code	Description	Term	Charge	Payment	Balance	Source	Effective Date
GRAF	Grad RA Fee Rem Fall	201710		4,485.99	.00	F	18-SEP-2017
GHRF	Grad RA Health Ins Rem Fall	201710		1,477.77	.00	F	18-SEP-2017
R011	Grad Fall Qtr Tuition & Fees	201710	4,535.76		.00	R	16-AUG-2017
GINF	Fall Grad Health Ins (SHIP)	201710	1,428.00		.00	R	16-AUG-2017

Fall Tuition & Fee charges = \$5,963.76

# Types of Funding

- How to fund your Graduate Education?
  - Fellowships
  - Academic Appointments
  - **Student Loans**
  - Personal Resources



## Glossary

- 2017-18 Graduate Student Expense Budget (Non-University Housing)
- Fees - \$17,946
- Books & Supplies - \$1,172
- Basic Living - \$15,516
  - Housing
  - Food
  - Personal
- Transportation - \$1,810
- TOTAL = \$36,444
  
- For citizens who are not CA residents add \$15,102 for supplemental nonresident tuition = \$51,546



# Financial Aid

- **Loans**
  - Loans via UC Davis are available to US Citizens & Permanent Residents
  - Loans are available to meet, but not exceed, the Graduate Student Budget.
  - Students may apply for loans throughout each academic year
  - Graduate students are eligible for Unsubsidized, Graduate Plus, or Alternative loans which will need to be repaid.
  - First-time borrowers of federal loans must complete Entrance Loan Counseling and complete a Master Promissory Note (MPN), before money will be released.
- **Emergency, Short-Term, and Assistant Loans**
  - If you are experiencing a temporary shortage of funds, the Financial Aid Office offers Emergency, Short-Term, and Assistant Loans. Applications with instructions for applying are available online at the link below
  - <http://financialaid.ucdavis.edu/loans/graduate.html>



# Financial Aid

- **Fall Quarter 2017 Loan Disbursement Dates**
  - REMINDER: All financial aid documents must be received and requirements must be satisfied before financial aid can disburse. Check the status of your financial aid through MyAwards.
  - Tuesday, September 18<sup>th</sup>: Fall Quarter financial aid is released to student accounts to pay Tuition & Fees and other university charges. Refunds released on Sept 20<sup>th</sup> only if enrolled in Direct Deposit
  - If not enrolled in direct deposit, Financial Aid refund checks will be available on Monday, September 25, 2017. Check pickup is available at the Student Accounting Window on the Second Floor of Dutton Hall (9:00-4:00). There will be lines!

# Financial Aid

- **Financial Aid and Scholarships Office**
  - <http://financialaid.ucdavis.edu/graduate/gradstudies/index.html>
  - The Financial Aid Office Window is open in Dutton Hall from 10 a.m. to 2 p.m., Monday-Friday. However, we have extended hours from 9 a.m. to 4:00 p.m. for the first two weeks of the Fall 2017 quarter.
  - If you have questions for Financial Aid, we are committed to returning inquiries within a 24-48 hour time frame. You may contact us at (530) 752-9246 or <http://financialaid.ucdavis.edu/contact.html>

# Financial Aid

To be considered for grants and loans, you must apply for financial aid every year by submitting a Free Application for Federal Student Aid (FAFSA) at <http://www.fafsa.ed.gov> or California Dream Act Application at <https://dream.csac.ca.gov/>

- Priority filing deadline for grant eligibility is March 2<sup>nd</sup>. The information provided on the FAFSA will help you determine an estimate of need based-aid.
- Graduate Student Expense Budget: Fees & Tuition, Books & Supplies, Basic Living (Housing, Food, Personal), Transportation
- Student budget minus EFC = Need based-aid

## Over Awards

- Only applicable if you have need-based aid (e.g. loans)
- Every student's financial situation is unique
- If you are paid a loan and then later receive additional financial support (TA, GSR, Fellowship), you may be required to immediately repay some of the loan – for example, the Campus Fee Grant (\$210 per quarter; \$630 total).
- To minimize the impact of this situation, report all TA and GSR appointments, departmental fellowships, grants, and external funding to the Financial Aid Office as soon as you confirm the amount you will receive

# Tax

- **Prepared statement:**
  - The information I'm presenting today is intended only to introduce you to the tax rules applicable to recipients of scholarships and fellowships. The University of California does not provide tax advice; you should contact your personal tax advisor with any questions or concerns.
- **Taxation of Grant/Scholarship Awards:**
  - The Tax Reform Act of 1986 makes taxable: scholarships, grants, fellowships, traineeships, and other forms of gift aid that exceed the costs of tuition, fees, required books, and supplies.
  - Tax year (the calendar year) versus the academic year (Oct – June)
- **If you had income, you may be required to file two income tax returns: (1) Federal, and (2) State**

# Tax

- **Forms:** [https://afs.ucdavis.edu/our\\_services/student-accounting/tax-information/index.html](https://afs.ucdavis.edu/our_services/student-accounting/tax-information/index.html)
  - **1098-T**
    - "Tuition Payments Statement"
    - sent to Resident Aliens, for Tax Purposes, and U.S. Citizens
  - **W-2**
    - W-2's are issued to everyone who worked and were paid by an employer during the previous calendar year unless all wages were exempt under a tax treaty
  - **1042-S**
    - 1042S's are issued to anyone who received a nonqualified scholarship or tax treaty benefit (which means some or all of your previous year's salary was exempt from Federal Taxes) during the previous year
  - **See IRS Publication 970 (Tax Benefits for Education), IRS website at <https://www.irs.gov/pub/irs-pdf/p970.pdf>**

# Tax

- Internal Revenue Service (IRS) regulations, you do not have to pay taxes on a scholarship or fellowship to the extent the funds are used for required tuition, fees, books, supplies, equipment, or other mandatory fees for classes or enrollment. The amount of health insurance premiums you pay to the University in order to be enrolled is also considered a required fee. To the extent you use scholarship or fellowship funds to pay for these types of required fees and expenses, the funds should be excluded from your taxable income.
- Regardless of how the scholarship and fellowship funds are paid to you (i.e., either directly or on your behalf) you are required to maintain records and documentation showing that you used all or a portion of your scholarship or fellowship funds for these required purposes.
- Any portion of a scholarship or fellowship used to pay for other expenses (e.g., room and board, travel, and other living expenses) should be included in your taxable income for the year. Again, this would be the case regardless of how the funds were paid. Therefore, you may have to pay income taxes on the portion of your scholarship or fellowship used for such expenses. For more information on the tax treatment of scholarships and fellowships, see IRS Publication 970 (Tax Benefits for Education), which can be found on the IRS website at <http://www.irs.gov/formspubs/lists/0,,id=97819,00.html>.
- You should make the determination regarding whether your scholarship or fellowship is taxable based upon your individual facts, irrespective of how the University may have applied your award funds to the amounts you owed the University. To the extent that you determine that a portion or all of your scholarship or fellowship funds are not subject to tax, you should retain receipts and other documents that show the total amount of your qualifying (i.e., nontaxable) expenses.
- the University is required to file a Form 1098-T (Tuition Statement) information return to IRS for most students. If a return is filed, the University must also provide a copy of the return to the student showing the information reported. Depending on the UC campus you attend, either the amount of qualified tuition and related expenses paid or the amount billed is reported (in either Box 1 or Box 2 of the 1098-T). Among other information, the University also is required to report the amount of all scholarships and fellowships (referred to by the IRS as "scholarships or grants"), from all known sources, that the University processed on your behalf. The aggregated amount reported for these types of awards is without regard to whether any portion may be taxable. The amounts reported on the 1098-T represent a summary of the qualified tuition and related expenses, as well as any scholarships and fellowships you received, based on the information on file at the UC campus you attended. This information may be of use to you in calculating the amount of the higher education tax credit or deduction you may be eligible to claim, but your personal financial records serve as the official supporting documentation for your federal income tax return. For more information about the education tax credit or deduction, see IRS Publication 970, which is available on the IRS website shown above.

# Miscellaneous Funding

## UC Davis Student Parent Child Care Funding Program

Student Parent Child Care Funding has two sources:

1. Community Based Care Grant (CBCG): (for undergraduate, graduate and professional students)
2. Graduate Student Child Care Grant (GSCCG): (for graduate and professional students only)
  - Provides funding per quarter for child care expense
  - Apply here: [http://worklife-wellness.ucdavis.edu/family\\_care/children/childcaresub.html](http://worklife-wellness.ucdavis.edu/family_care/children/childcaresub.html)

## Dean Witter Fund

A limited amount of money is available through the Dean Witter Fund to help offset the cost of room rental and food & beverage expenses for events intended to promote faculty/student academic interaction in informal settings

- Graduate students or faculty may act as a sponsor and apply for Dean Witter funds
- The sponsor may be reimbursed for up to \$10 per individual with a maximum of \$100 per event.
- Apply here: <https://grad.ucdavis.edu/financial-support/internal-fellowships/dean-witter-fund>



# Review Types of Funding

The most common types of payment transactions are:

## 1. Academic employment salary

- a. Paid via the Payroll System (not visible in MyBill or SISWEB)
- b. <https://grad.ucdavis.edu/financial-support/academic-employment/understanding-your-student-salary>

## 2. Academic employment remission

- a. Paid via banner (visible in MyBill & SISWEB)

## 3. Stipend fellowships

- a. paid via banner for US Citizens (no withholding tax)
- b. Paid via Payroll for Nonresident Aliens (withholding tax deducted)

## 4. Tuition & Fee and NRST fellowships

- a. Paid via banner (visible in MyBill & SISWEB)

## 5. Educational loans

- a. Paid via banner (visible in MyBill & SISWEB)

## 6. Travel Expenses: Reimbursement of authorized Travel Expenses processed via the MyTravel System and not visible via MyBill or SISWEB

## 7. Supplies & Equipment: Reimbursement of authorized Supplies & Equipment purchases processed via the Kuali Financial System (KFS) (not visible via MyBill or SISWEB)

# Where is my money (who do I ask)?

- **#1 - Your graduate program coordinator**
  - <https://grad.ucdavis.edu/programs/>
- **Contact listed on your funding letter**
  - GSR, TA, Internal Fellowship, External Agency, etc.
- **The PI who hired you**
  - Can refer you to their appropriate accounting staff
- **External Fellowships**
  - Maria Garcia – [majgarcia@ucdavis.edu](mailto:majgarcia@ucdavis.edu)
- **Complex, multi-department, issue?**
  - **Financial Support Specialist** - Lisa Finnegan - [lfinnegan@ucdavis.edu](mailto:lfinnegan@ucdavis.edu) or 530 752.8864

# Important Dates

- **For Financial Aid:** <http://financialaid.ucdavis.edu/graduate/gradstudies/dates.html>
- **Drop for Non-Payment, Graduate Students:** <http://registrar.ucdavis.edu/tuition/non-payment.cfm>
- **Quarter Dates and Deadlines:** <http://registrar.ucdavis.edu/calendar/quarter.cfm>
  
- **Sept 18<sup>th</sup>:** Fall NRST and/or Tuition & Fees paid if you have a fellowship or qualifying academic appointment
- **Sept 18<sup>th</sup>:** Fall Financial Aid (loans) posts to student accounts
- **Sept 20<sup>th</sup>:** Fall loan remainder checks available to students
- **Sept 27<sup>th</sup>:** Fall quarter instruction begins
- **Nov 1<sup>st</sup>:** First fall quarter fellowship stipend payment date and the first academic appointment salary payment date
- **Nov 16<sup>th</sup>:** Grad student fall fee payment deadline (\$110 late fee & winter hold)
- **Mid-Nov to mid-Dec:** Winter quarter Tuition & Fees and/or NRST charged (when you enroll)
- **Dec 1<sup>st</sup>:** The second fall quarter fellowship stipend payment date and the second academic appointment salary payment date
- **Dec 29<sup>th</sup>:** Winter NRST and/or Tuition & Fees paid if you have a fellowship or qualifying academic appointment
- **Jan 1<sup>st</sup>:** The third (and final) fall quarter fellowship stipend payment date and the third academic appointment salary payment date
- **Jan 8<sup>th</sup>:** Winter quarter instruction begins
- **Jan 15<sup>th</sup>:** UC Davis Continuing Graduate Student Internal Fellowship application due

# Important Reminders – External Fellowships

- Guaranteed not to be funded if you don't apply
- Seek opportunities to gain research, service learning, & volunteer experience
- Analyze announcement for eligibility and restrictions.
- Apply early. Apply to SEVERAL likely sources (if allowable).
- Answer questions directly & follow instructions.
- Ask several people to give you feedback on your essay drafts.
- Develop an application plan based on due dates.
  - Submit at least three days early!
  - Anticipate last minute glitches.
- If an electronic submission (e.g. Fastlane/NSF) learn the system early.
- Letters of reference timing (ask early)
- Look for funding every year; beginning early fall for the next academic year

## Important Reminders

- Check your student account balance often!
- You may not be able to hold multiple major fellowships/appointments at the same time (check restrictions)
- For US Citizens, no withholding tax is deducted from fellowship stipends. You may have a tax liability in April.
- PELP & Filing Fee can interrupt your funding
- First stipend disbursement and/or paycheck is November 01<sup>st</sup>.
- If you have a fall TA appointment, you could still owe \$275.99 in Tuition & Fees

# Important Reminders

- For your next book club:
  - **Graduate Student Guide:** <https://grad.ucdavis.edu/postdoctoral/forms-information/guides-handbooks>
  - **Graduate Student Employment Handbook for Teaching Assistants and Associates In\_:** <http://gradstudies.ucdavis.edu/faculty-staff/reports-publications/guides-handbooks>
  - **Graduate Studies Policies** for graduate students (over 20 to choose from!): <https://grad.ucdavis.edu/policies>
  - **IRS Publication 970** (Tax Benefits for Education), IRS website at <https://www.irs.gov/pub/irs-pdf/p970.pdf>
  - **Registration Information:** <http://registrar.ucdavis.edu/registration/index.cfm>

# Questions?



UC DAVIS

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UC DAVIS GRADUATE STUDIES PRESENTS

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# GRADUATE STUDENT **ORIENTATION**

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