

UC DAVIS

OFFICE OF GRADUATE STUDIES



Navigating University Funding Financing Your Graduate Education

UC Davis
Graduate Studies
09.09.2016

Today's agenda

- **Introductions**
- **Financial Systems**
- **Cost**
- **Types of funding**
 - **Internal fellowships**
 - **External fellowships**
 - **Academic appointments**
 - **Student loans**
- **Tax teaser**
- **Reminders**
- **Questions?**



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:

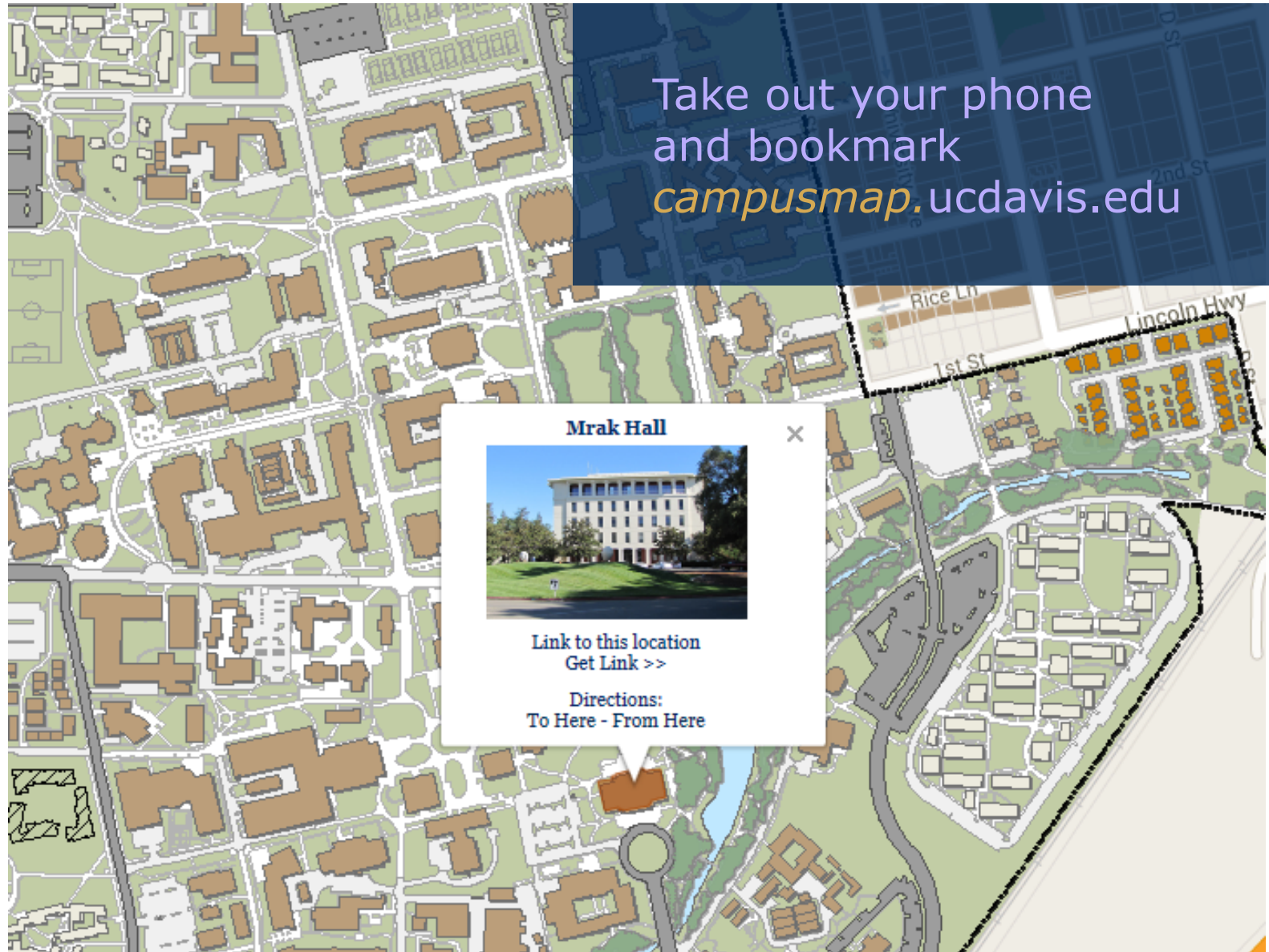
Description	Number of Students	Percentage	Amount (fall 2014)
Fellowship Stipends	1,502	33%	\$6,866,907.00
Tuition & Fee Fellowships	811	18%	\$2,837,112.00
NRST Fellowships	655	15%	\$4,076,009.00
Total Fellowship \$			\$13,780,028.00
GSR Salary	1,320	29%	\$6,448,540.00
GSR Tuition & Fee Remission	1,283	28%	\$7,782,364.00
GSR NRST Remission	179	4%	\$874,963.00
Total GSR Support \$			\$15,105,867.00
TA Salary	1,777	39%	\$9,523,664.00
TA Remission	1,560	35%	\$7,955,303.00
Total TA Support \$			\$17,478,967.00
Loans	562	12%	\$3,198,621.00
No support	539	12%	\$0.00
Totals	4,495	100%	\$49,563,483.00

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

Introductions

- **Graduate Studies**
 - 250 Mrak Hall: 9 to noon, 1 to 5, M-F
 - Role of advocacy
 - Responsible for the administration and oversight of academic & administrative policies that impact graduate students and post doctoral scholars
 - 95 Graduate Programs
 - ≈4,600 academic graduate students

Take out your phone
and bookmark
campusmap.ucdavis.edu



Graduate Studies

- **GS has 9 units with about 43 total staff:**
<http://gradstudies.ucdavis.edu/about-us/staff-directory>
 - **Deans and Dean's Staff** – Vice Provost and Dean, Associate Deans, Assistant Dean, and Development (gifts and endowments)
 - **Diversity and Professional Development** - This unit offers resources for career services and professional development
 - **Graduate Admissions & Academic Services** - They sent you your admission letter and keep track of your progress during your graduate career
 - **Business & Financial Services** - responsible for Grad Studies' operational budget, for supporting graduate programs with academic appointments, and annual commencement
 - **Information Technology** – Online Application, keep our web sight and computers running
 - **Analysis & Policy** – Report generation, data analysis, and responsible for administrative support for the Graduate Council
 - **Communications and Marketing** – Responsible for all Web, social media, print, and electronic publications
 - **Counseling and Psychological Services** - available to meet with all graduate students individually in a confidential setting to discuss any problems or concerns you are experiencing
 - **Graduate Student Financial Support**

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
- Deborah McCook - External Fellowship Adviser for Post-docs and graduate students in programs under the CA&ES Dean's Office
- Maria Garcia – External Fellowship Adviser for all graduate students in programs not under the CA&ES Dean's Office

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, 2nd 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/html/slr.html>

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


- **UC Davis login** information (your UC Davis Login ID), please visit the Computing Accounts web page (<http://computingaccounts.ucdavis.edu>).
- **Student Information System (SISWEB):**
 - <http://sisweb.ucdavis.edu/>
 - enroll in classes
 - adjust your class schedule
 - view and print your class schedule
 - 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

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
 - 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

		University of California, Davis One Shields Avenue Davis, CA 95616 (530) 752-3646 http://studentaccounting.ucdavis.edu	
Sacramento, CA 95826 United States of America		Student ID:	
Payment Information		Account Summary	
Payment due date: ①	09/15/2011	Previous Balance: ④	\$0.00
Amount due: ②	\$0.00	Payments and Credits: ⑤	\$-100.00
Important Information		Purchases and Adjustments: ⑥	\$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 http://sisweb.ucdavis.edu .		Estimated Financial Aid: * ⑦	\$-8,036.00
③		Amount Deferred: ⑧	\$0.00
		New Total Balance: ⑨	\$-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://accounting.ucdavis.edu/DirectDeposit/>
- 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

- **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.

Calendar

- Published payment due date for fall 2016-17 Tuition & Fees is September 15th
- For Graduate Students: If your account balance is not paid by the 8th week of the quarter (**November 10th**):
 - \$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
 - <http://registrar.ucdavis.edu/tuition/non-payment.cfm>
 - <http://registrar.ucdavis.edu/calendar/fees.cfm>

Graduate Student Tuition & Fees 2016-17

2016-17 Graduate Nonresident Tuition & Fees

- \$17,581.30 Tuition & Fees
- We have held graduate Tuition (\$11,220) level and implemented only a 10% increase to the Student Services Fee (\$972 to \$1,074) since 2011-12
- \$15,102.00 Nonresident Supplemental Tuition (NRST)
- We have not increased graduate NRST since 2004-05
- Total = **\$32,683.30**
- Student Fee and Tuition Overviews – Descriptions and Uses:
 - 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 2016-17

Graduate Student Fees	Fall	Winter	Spring	Total
GSA Fee	\$12.00	\$12.00	\$12.00	\$36.00
Memorial Union Fee	\$28.50	\$28.50	\$28.50	\$85.50
Facilities and Campus Enhancements Fee	\$139.67	\$139.66	\$139.66	\$412.99
Campus Expansion Initiative	\$64.27	\$64.27	\$64.27	\$192.81
Student Facilities Safety Fee	\$22.00	\$22.00	\$22.00	\$66.00
Student Services Health Fee	\$44.00	\$44.00	\$44.00	\$132.00
Health Insurance (UC SHIP)	\$1,448.00	\$1,448.00	\$1,448.00	\$4,344.00
Student Services Fee	\$358.00	\$358.00	\$358.00	\$1,074.00
Tuition	\$3,740.00	\$3,740.00	\$3,740.00	\$11,220.00
Subtotal - Graduate fees 2016-17	\$5,860.44	\$5,860.43	\$5,860.43	\$17,581.30
Nonresident Supplemental Tuition	\$5,034.00	\$5,034.00	\$5,034.00	\$15,102.00
Total - Nonresidents 2016-17	\$10,894.44	\$10,894.43	\$10,894.43	\$32,683.30

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."

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 2016 application deadline to receive funding for the school year starting in fall 2017)
- 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**

- **December 1st:** Fellowship applications from continuing students through our online application form.
 - Letters of reference should be submitted by December 6th
- **December 15th:** Graduate Programs forward nominations for continuing students to the Office of Graduate Studies
- **February:** 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 Fellowship Application Process

- 37 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 (14-15)
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

Travel Awards

- Offered twice/year in Oct (for travel from July - June) & March (for travel from January - December)
 - Nominations due to OGS November 15th and April 15th
 - Awards announced the week of December 15th and May 15th
- 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
- 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.

Graduate Student Fees 2016-17

Graduate Student Fees	Fall	Winter	Spring	Total
GSA Fee	\$12.00	\$12.00	\$12.00	\$36.00
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Nonresident Supplemental Tuition	\$5,034.00	\$5,034.00	\$5,034.00	\$15,102.00
Total - Nonresidents 2016-17	\$10,894.44	\$10,894.43	\$10,894.43	\$32,683.30

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.
 - INTERNATIONAL Opportunities: Fulbright, Social Science Research Council
 - INTERNATIONAL STUDENT FELLOWSHIPS
 - Various governments: China, Korea, Taiwan, etc.
 - UC Mexus/Becas/CONICYT/CONACYT/Fulbright – 30+
 - Vietnam Foundation – 10

External Fellowship Resources

- Office of Graduate Studies
 - Current grants and fellowships:
<http://gradstudies.ucdavis.edu/ssupport/fellowships-approach-deadlines.html>
 - External Fellowship Application Procedure:
<http://gradstudies.ucdavis.edu/ssupport/external-fellowships-pol-proc.html>
 - Comprehensive list of fellowships and grants:
http://www.gradstudies.ucdavis.edu/programs/external_fellowships.cfm
 - Resources: <http://gradstudies.ucdavis.edu/ssupport/external-resources.html>
 - Fellowship Announcements
 - International Student Resources
 - Search Engines
 - Writing Resources
- Subscribe to the Funding Announcement Listserv:
<https://lists.ucdavis.edu/sympa/info/gradfund?ticket=ST-1749689-1tcpdxTc37b0G0UhvGRH-casweb8>

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

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 01st (always a month in arrears).
 - Usually includes Tuition & Fee remission and NRST remission as a benefit of employment: <http://gradstudies.ucdavis.edu/current-students/employment/tuition-and-fee-remission>
 - 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 \$790. (50% time at highest step, X, is \$3,099 per month)
 - To obtain research jobs, the best way to start is to inquire within your own graduate group or department.

Academic Appointments

- **TA = Teaching Assistant**

- Employed by department to assist with tasks related to teaching undergraduates.
- Usually includes partial Tuition & Fee remission: <http://gradstudies.ucdavis.edu/current-students/employment/tuition-and-fee-remission>
- First paycheck is November 01st (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 \$1,114.
- 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

Remission for non-residents 2016-17:						
	Quarter	Tuition & Fees		Health	NRST	Amount Student Pays
GSR:	Fall	\$4,364.44	+	\$1,469.00	\$5,034.00	\$0.00
	Winter & Spring	\$4,364.43	+	\$1,469.00	\$5,034.00	\$0.00
TA:	Fall	\$4,098.00	+	\$1,469.00	\$136.00	\$266.44 + 4,898 = 5,164.44
	Winter & Spring	\$4,098.00	+	\$1,469.00	\$136.00	\$266.43 + 4,898 = 5,164.43

2016-17 Graduate Student Fees not covered by TA remission

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Student Services Health Fee	\$48.00	\$48.00	\$48.00	\$144.00
Health Insurance (UC SHIP)	\$1,448.00	\$1,448.00	\$1,448.00	\$4,344.00
Student Services Fee (formerly Registration Fee)	\$358.00	\$358.00	\$358.00	\$1,074.00
Tuition (formerly Educational Fee)	\$3,740.00	\$3,740.00	\$3,740.00	\$11,220.00
Subtotal - Graduate fees 2016-17	\$5,860.44	\$5,860.43	\$5,860.43	\$17,581.30
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Tuition & Fee Remission Example

(this example uses 2014-15 amounts)

Account Details

Spring GSR remission = \$5,367.53

Detail Code	Description	Term	Charge	Payment	Balance	Source	Effective Date
R011	Grad Fall Qtr Tuition & Fees	201410	4,369.54		4,369.54	R	18-AUG-2014
GINF	Fall Grad Health Ins (SHIP)	201410	1,144.00		1,144.00	R	18-AUG-2014
XWCK	Payment received - Thank You	201403		20.00	.00	T	22-APR-2014
SHCS	Health Center Charge	201403	20.00		.00	T	26-MAR-2014
GRAS	Grad RA Fee Rem Spring	201403		4,325.53	.00	F	24-MAR-2014
GHRG	Grad RA Health Ins Rem-Spring	201403		1,042.00	.00	F	24-MAR-2014
R013	Grad Spr Qtr Tuition & Fees	201403	4,369.53		.00	R	19-FEB-2014
GINS	Spr Grad Health Ins (SHIP)	201403	998.00		.00	R	19-FEB-2014
GRAR	Grad RA Fee Rem Winter	201401		4,325.53	.00	F	10-JAN-2014
GHRW	Grad RA Health Ins Rem-Winter	201401		1,042.00	.00	F	10-JAN-2014
R012	Grad Wtr Qtr Tuition & Fees	201401	4,369.53		.00	R	19-NOV-2013
GINW	Wtr Grad Health Ins (SHIP)	201401	998.00		.00	R	19-NOV-2013

Spring Tuition & Fee charges = \$5,367.53

Query Balance

5,513.54

Account Balance

5,513.54

Amount Due

5,513.54

Memo Balance

.00

Authorized Aid Balance

-5,513.54

NSF

0

Receipt?

N

Types of Funding

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



Financial Aid for International Students

- Though rare, there are loans available to international students who meet certain criteria. Most loans require a cosigner*. A variety of organizations and institutions provide private loans to international students. Many provide assistance that is targeted to students from specific regions or countries and who meet certain criteria. The best ways to search for a loan is by contacting your bank and by doing online research (for example: <http://www.elmselect.com/#/>). It is essential that you read and understand all loan terms before signing a contract.
- *A cosigner is someone who guarantees and is responsible for payment to the loaning institution if for any reason you are unable to pay back the loan. Most loans in the U.S. will require that your co-signer is a U.S. Citizen or Permanent Resident and have stable employment and income.

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:** <http://studentaccounting.ucdavis.edu/taxes/index.cfm>
 - **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 <http://www.irs.gov/formspubs/lists/0,,id=97819,00.html>**

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. <http://gradstudies.ucdavis.edu/current-students/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 Payroll for Nonresident Aliens (not visible in MyBill or SISWEB)
- 4. Tuition & Fee and NRST fellowships**
 - a. Paid via banner (visible in MyBill & SISWEB)
- 5. Travel Expenses:** Reimbursement of authorized Travel Expenses processed via the MyTravel System (soon to be AggieTravel) and not visible via MyBill or SISWEB
- 6. Supplies & Equipment:** Reimbursement of authorized Supplies & Equipment purchases processed via the Kual Financial System (KFS) (not visible via MyBill or SISWEB)

Where is my money (who do I ask)?

- **#1 - Your graduate program coordinator**
 - <http://gradstudies.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**
 - CA&ES: Deborah McCook – dlimccook@ucdavis.edu
 - Not CA&ES: Maria Garcia – majgarcia@ucdavis.edu
- **Complex, multi-department, issue?**
 - **Financial Support Specialist** - Lisa Finnegan - lfinnegan@ucdavis.edu
or 530 752.8864

Important Dates (fall & winter)

http://registrar.ucdavis.edu/html/academic_calendar.html

- **Sept 11th:** Fall NRST and/or Tuition & Fees paid if you have a fellowship or qualifying academic appointment
- **Sept 21st:** Fall quarter instruction begins
- **Nov 1st:** First fall quarter fellowship stipend payment date and the first academic appointment salary payment date
- **Nov 10th:** Grad student fall fee payment deadline (\$110 late fee & winter hold)
- **Dec 1st:** The second fall quarter fellowship stipend payment date and the second academic appointment salary payment date
- **Dec 1st:** UC Davis Continuing Graduate Student Internal Fellowship application due
- **Dec (first week):** Winter quarter fees assessed
- **Dec 30th:** Winter NRST and/or Tuition & Fees paid if you have a fellowship or qualifying academic appointment
- **Jan 1st:** The third (and final) fall quarter fellowship stipend payment date and the third academic appointment salary payment date
- **Jan 6th:** Winter quarter instruction begins
- **Feb 1st:** The first winter quarter fellowship stipend payment date and the first academic appointment salary payment date
- **Mar 1st:** The second winter quarter fellowship stipend payment date and the second academic appointment salary payment date
- **Mar 2nd:** Grad student winter fee payment deadline (\$110 late fee & spring hold)
- **April 1st:** The third (and final) winter quarter fellowship stipend payment date and the third academic appointment salary payment date

Important Reminders

- Check your student account balance often! Think of it as a monthly bill to review (like your rent or utilities).
- You may not be able to hold multiple major fellowships/appointments at the same time (check restrictions).
- PELP & Filing Fee can interrupt your funding.
- First stipend disbursement and/or paycheck is November 01st.

Important Reminders

- Policies and Guides:
 - **Graduate Student Guide:**
<http://gradstudies.ucdavis.edu/faculty-staff/reports-publications/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!): <http://gradstudies.ucdavis.edu/graduate-programs/policies>
 - **GradPathways** (Professional Development Program for UC Davis Graduate Students): <http://gradstudies.ucdavis.edu/professional-development/gradpathways>
 - **IRS Publication 970** (Tax Benefits for Education), IRS website at <http://www.irs.gov/formspubs/lists/0,,id=97819,00.html>
 - **Class Schedule and Registration Guide:**
<http://registrar.ucdavis.edu/csrg/>

• Questions?



Thank You!