Graduate Program Staff Workshops for Fellowship and GPFA Processing

October 23 & November 05, 2014
Today’s agenda

• Introductions
  • Departments involved in Student Support
  • 2014-15 fee levels
  • Online applications and systems
• External Fellowships
• Internal Fellowships
• Academic Appointments
• Loans
• Miscellaneous Topics
• Questions?
Introductions

- **Graduate Studies**
  - 250 Mrak Hall
  - Role of advocacy
  - Responsible for the administration and oversight of academic & administrative polices that impact graduate students and post doctoral scholars
- 95 Graduate Programs
- 4,600 academic graduate students
Graduate Studies

- GS has 9 units with about 43 total staff: [http://gradstudies.ucdavis.edu/about-us/staff-directory](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
- Kristin Provost – 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](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
  Class Schedule and Registration Guide

- **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](http://siss.ucdavis.edu)
CA Residency for Tuition Purposes

- **The Registrar’s Office:**
  - CA Residency for Tuition Purposes

- Resident or Nonresident, all incoming students must complete a Statement of Legal Residence (SLR) so that a residence determination can be made.
  - Statements of Legal Residence (SLR) are submitted by new students after acceptance of an offer of admission.
  - If a student does not complete the SLR or submit the necessary documents, the student will be classified as a Nonresident and will be assessed Nonresident Supplemental Tuition.

- **Petition for Classification to Resident**
  - Petitions for Classification are filed online and are used by continuing UC Davis Students classified as Nonresident in a prior quarter who are seeking Resident classification.
    - Status of petition can be checked online.
  - Filing Period to be classified as a resident for fall quarter is June 1st through the First Day of Instruction for the applicable quarter.
    - Do not wait until September! NRST for the fall quarter will be charged if the student enrolls prior to an approved petition – which could impact their summer funding.
Graduate Student Tuition & Fees 2014-15

2014-15 Graduate CA resident Tuition & Fees
- Total = $16,540.60
- We have held graduate Tuition ($11,220) and the Student Services Fee ($972) level since 2011-12

2014-15 Graduate Nonresident Tuition & Fees
- $16,540.60 Tuition & Fees
- $15,102.00 Nonresident Supplemental Tuition (NRST)
- We have not increased graduate NRST since 2004-05
- Total = $31,642.60

- Student Fee and Tuition Overviews – Descriptions and Uses:
<table>
<thead>
<tr>
<th>Graduate Student Fees</th>
<th>Fall</th>
<th>Winter</th>
<th>Spring</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>GSA Fee</td>
<td>$12.00</td>
<td>$12.00</td>
<td>$12.00</td>
<td>$36.00</td>
</tr>
<tr>
<td>Memorial Union Fee</td>
<td>$28.50</td>
<td>$28.50</td>
<td>$28.50</td>
<td>$85.50</td>
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<tr>
<td>Facilities and Campus Enhancements Fee</td>
<td>$134.83</td>
<td>$134.83</td>
<td>$134.83</td>
<td>$404.49</td>
</tr>
<tr>
<td>Campus Expansion Initiative</td>
<td>$64.21</td>
<td>$64.20</td>
<td>$64.20</td>
<td>$192.61</td>
</tr>
<tr>
<td>Student Facilities Safety Fee</td>
<td>$22.00</td>
<td>$22.00</td>
<td>$22.00</td>
<td>$66.00</td>
</tr>
<tr>
<td>Student Services Health Fee</td>
<td>$44.00</td>
<td>$44.00</td>
<td>$44.00</td>
<td>$132.00</td>
</tr>
<tr>
<td>Health Insurance (UC SHIP)</td>
<td>$1,144.00</td>
<td>$1,144.00</td>
<td>$1,144.00</td>
<td>$3,432.00</td>
</tr>
<tr>
<td>Student Services Fee (formerly Registration Fee)</td>
<td>$324.00</td>
<td>$324.00</td>
<td>$324.00</td>
<td>$972.00</td>
</tr>
<tr>
<td>Tuition (formerly Educational Fee)</td>
<td>$3,740.00</td>
<td>$3,740.00</td>
<td>$3,740.00</td>
<td>$11,220.00</td>
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<tr>
<td><strong>Subtotal - Graduate fees 2014-15</strong></td>
<td><strong>$5,513.54</strong></td>
<td><strong>$5,513.53</strong></td>
<td><strong>$5,513.53</strong></td>
<td><strong>$16,540.60</strong></td>
</tr>
<tr>
<td>Nonresident Supplemental Tuition</td>
<td>$5,034.00</td>
<td>$5,034.00</td>
<td>$5,034.00</td>
<td>$15,102.00</td>
</tr>
<tr>
<td><strong>Total - Nonresidents 2014-15</strong></td>
<td><strong>$10,547.54</strong></td>
<td><strong>$10,547.53</strong></td>
<td><strong>$10,547.53</strong></td>
<td><strong>$31,642.60</strong></td>
</tr>
</tbody>
</table>
Calendar

- Published due date for fall 2014-15 fees is September 15th
- For Graduate Students: If your account balance is not paid by the 8th week of the quarter (November 20th):
  - $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/tuition/non-payment.cfm)
2014-15 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/gs305-filing-fee-app.pdf](http://gradstudies.ucdavis.edu/sites/default/files/upload/files/current-students/gs305-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](http://cashier.ucdavis.edu/student/svcsfees.cfm).

In Absentia Registration: $1,754 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](http://gradstudies.ucdavis.edu/current-students/admissions-academic-services/absentia-faq)
Figure 1
States Have Cut Higher Education Funding Deeply in Recent Years

<table>
<thead>
<tr>
<th>Percent change in state spending per student, inflation adjusted, FY08 - FY13</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td>-50.4%</td>
<td>Arizona</td>
</tr>
<tr>
<td>-49.9%</td>
<td>New Hampshire</td>
</tr>
<tr>
<td>-43.6%</td>
<td>Oregon</td>
</tr>
<tr>
<td>-42%</td>
<td>Louisiana</td>
</tr>
<tr>
<td>-41.2%</td>
<td>Florida</td>
</tr>
<tr>
<td>-39.8%</td>
<td>Alabama</td>
</tr>
<tr>
<td>-39.6%</td>
<td>Idaho</td>
</tr>
<tr>
<td>-38.8%</td>
<td>South Carolina</td>
</tr>
<tr>
<td>-37.5%</td>
<td>Washington</td>
</tr>
<tr>
<td>-37.4%</td>
<td>Massachusetts</td>
</tr>
<tr>
<td>-36.7%</td>
<td>New Mexico</td>
</tr>
<tr>
<td>-32.4%</td>
<td>Mississippi</td>
</tr>
<tr>
<td>-32.4%</td>
<td>Michigan</td>
</tr>
<tr>
<td>-32.3%</td>
<td>Colorado</td>
</tr>
<tr>
<td>-31.2%</td>
<td>Nevada</td>
</tr>
<tr>
<td>-30.6%</td>
<td>Utah</td>
</tr>
<tr>
<td>-30.4%</td>
<td>Minnesota</td>
</tr>
<tr>
<td>-30.1%</td>
<td>Tennessee</td>
</tr>
<tr>
<td>-29.9%</td>
<td>Pennsylvania</td>
</tr>
<tr>
<td>-29.7%</td>
<td>Missouri</td>
</tr>
<tr>
<td>-29.5%</td>
<td>Georgia</td>
</tr>
<tr>
<td>-29.3%</td>
<td>California</td>
</tr>
<tr>
<td>-28.9%</td>
<td>Ohio</td>
</tr>
<tr>
<td>-27.8%</td>
<td>Virginia</td>
</tr>
<tr>
<td>-27.7%</td>
<td>Iowa</td>
</tr>
<tr>
<td>-27.2%</td>
<td>New Jersey</td>
</tr>
<tr>
<td>-26.3%</td>
<td>Kentucky</td>
</tr>
<tr>
<td>-26.2%</td>
<td>Oklahoma</td>
</tr>
<tr>
<td>-25.3%</td>
<td>Hawaii</td>
</tr>
<tr>
<td>-25%</td>
<td>Delaware</td>
</tr>
<tr>
<td>-24.8%</td>
<td>Rhode Island</td>
</tr>
<tr>
<td>-24.5%</td>
<td>Kansas</td>
</tr>
<tr>
<td>-23.3%</td>
<td>Illinois</td>
</tr>
<tr>
<td>-23.1%</td>
<td>Connecticut</td>
</tr>
<tr>
<td>-22.7%</td>
<td>Texas</td>
</tr>
</tbody>
</table>
### Figure 3
Tuition Has Increased Sharply at Public Colleges and Universities

Percent change in average tuition at public, four-year colleges, inflation adjusted, FY08 - FY13

<table>
<thead>
<tr>
<th>State</th>
<th>Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arizona</td>
<td>78.4%</td>
</tr>
<tr>
<td>California</td>
<td>72.0%</td>
</tr>
<tr>
<td>Florida</td>
<td>67.3%</td>
</tr>
<tr>
<td>Washington</td>
<td>63.6%</td>
</tr>
<tr>
<td>Georgia</td>
<td>63.2%</td>
</tr>
<tr>
<td>Hawaii</td>
<td>57.0%</td>
</tr>
<tr>
<td>Alabama</td>
<td>51.5%</td>
</tr>
<tr>
<td>Nevada</td>
<td>46.7%</td>
</tr>
<tr>
<td>Colorado</td>
<td>40.8%</td>
</tr>
<tr>
<td>Louisiana</td>
<td>38.0%</td>
</tr>
<tr>
<td>New Hampshire</td>
<td>36.7%</td>
</tr>
<tr>
<td>Rhode Island</td>
<td>36.6%</td>
</tr>
<tr>
<td>North Carolina</td>
<td>31.3%</td>
</tr>
<tr>
<td>Tennessee</td>
<td>30.1%</td>
</tr>
<tr>
<td>Virginia</td>
<td>28.5%</td>
</tr>
<tr>
<td>Oregon</td>
<td>27.0%</td>
</tr>
<tr>
<td>Delaware</td>
<td>26.8%</td>
</tr>
<tr>
<td>Utah</td>
<td>25.3%</td>
</tr>
<tr>
<td>Idaho</td>
<td>24.3%</td>
</tr>
<tr>
<td>Wisconsin</td>
<td>23.2%</td>
</tr>
<tr>
<td>Kentucky</td>
<td>22.4%</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>22.4%</td>
</tr>
<tr>
<td>New Mexico</td>
<td>21.7%</td>
</tr>
<tr>
<td>West Virginia</td>
<td>21.4%</td>
</tr>
<tr>
<td>Minnesota</td>
<td>21.1%</td>
</tr>
<tr>
<td>Illinois</td>
<td>21.1%</td>
</tr>
<tr>
<td>South Dakota</td>
<td>20.5%</td>
</tr>
<tr>
<td>Alaska</td>
<td>19.5%</td>
</tr>
<tr>
<td>Michigan</td>
<td>19.5%</td>
</tr>
<tr>
<td>Vermont</td>
<td>17.8%</td>
</tr>
<tr>
<td>Texas</td>
<td>17.8%</td>
</tr>
<tr>
<td>New York</td>
<td>17.5%</td>
</tr>
</tbody>
</table>
Figure 5
Students Are Shouldering A Larger Share of the Cost of Funding Public Higher Education

Tuition revenue as a percent of total educational revenue, FY 1987 - FY 2012

Note: Total educational revenue combines net tuition with state and local appropriations for higher education, excluding medical students, and represents the vast majority of instructional funding.
Source: State Higher Education Financing FY2012, State Higher Education Executive Officers Association
## Annual Revenues by Source of Funds
2000-2009 (in millions)

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>State Government</td>
<td>$577</td>
<td>$533</td>
<td>$491</td>
<td>$476</td>
<td>$496</td>
<td>$537</td>
<td>$599</td>
<td>$496</td>
<td>$563</td>
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<tr>
<td>Federal Government</td>
<td>$208</td>
<td>$239</td>
<td>$261</td>
<td>$287</td>
<td>$295</td>
<td>$310</td>
<td>$315</td>
<td>$348</td>
<td>$397</td>
</tr>
<tr>
<td>Student Fees and Tuition</td>
<td>$157</td>
<td>$173</td>
<td>$233</td>
<td>$269</td>
<td>$289</td>
<td>$300</td>
<td>$304</td>
<td>$356</td>
<td>$409</td>
</tr>
<tr>
<td>Sales and Service Activities</td>
<td>$160</td>
<td>$171</td>
<td>$186</td>
<td>$199</td>
<td>$213</td>
<td>$228</td>
<td>$258</td>
<td>$261</td>
<td>$254</td>
</tr>
<tr>
<td>Private Gifts, Grants, Contracts</td>
<td>$88</td>
<td>$96</td>
<td>$124</td>
<td>$113</td>
<td>$107</td>
<td>$126</td>
<td>$138</td>
<td>$156</td>
<td>$211</td>
</tr>
<tr>
<td>Auxiliary Enterprises</td>
<td>$79</td>
<td>$80</td>
<td>$87</td>
<td>$82</td>
<td>$87</td>
<td>$93</td>
<td>$93</td>
<td>$99</td>
<td>$93</td>
</tr>
<tr>
<td>Local Government / Other</td>
<td>$16</td>
<td>$27</td>
<td>$30</td>
<td>$28</td>
<td>$33</td>
<td>$39</td>
<td>$47</td>
<td>$52</td>
<td>$65</td>
</tr>
<tr>
<td><strong>Subtotal</strong></td>
<td><strong>$1,285</strong></td>
<td><strong>$1,318</strong></td>
<td><strong>$1,411</strong></td>
<td><strong>$1,453</strong></td>
<td><strong>$1,520</strong></td>
<td><strong>$1,633</strong></td>
<td><strong>$1,756</strong></td>
<td><strong>$1,767</strong></td>
<td><strong>$1,993</strong></td>
</tr>
<tr>
<td>Medical Center</td>
<td>$698</td>
<td>$779</td>
<td>$799</td>
<td>$860</td>
<td>$860</td>
<td>$938</td>
<td>$1,026</td>
<td>$1,074</td>
<td>$1,110</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$1,983</strong></td>
<td><strong>$2,097</strong></td>
<td><strong>$2,210</strong></td>
<td><strong>$2,313</strong></td>
<td><strong>$2,380</strong></td>
<td><strong>$2,571</strong></td>
<td><strong>$2,781</strong></td>
<td><strong>$2,842</strong></td>
<td><strong>$3,103</strong></td>
</tr>
</tbody>
</table>

### Source of Funds, Excluding Medical Center

#### 2001-02
- State: 44.9%
- Federal: 16.2%
- Auxiliary Enterprise: 6.1%
- Sales and Services: 12.5%
- Private: 6.8%
- Local / Other: 1.2%

#### 2009-10
- State: 28.2%
- Federal: 19.9%
- Sales and Services: 12.7%
- Student Fees: 20.5%
- Private: 10.6%
- Local / Other: 4.7%
Budget Overview

Budgeted Total Revenue, State Support and Tuition

2013–2014

UC Davis Revenue
$3.8 Billion

Base Budget Overview. UC Davis revenues come from many sources, but 80% are designated or restricted. For example, revenues from the UC Davis Medical Center, campus auxiliaries such as housing, and federal, state, and private sources to fund research support only these operations. The primary source for the campus’ teaching mission comes from unrestricted state funds and student tuition, as represented in the highlighted slices of the pie chart.

State support for the University of California dropped substantially over the five years beginning in 2007-08. State support at UC Davis dropped by one third over that time while fixed costs continued to increase. For 2013-14, the state is once again investing in the university. The State Unrestricted slice of the pie reflects the UC Davis share of the state’s five percent increase in unrestricted support for UC. Despite this increase in state support, the campus continues to carry a $19 million structural shortfall in state support and tuition (so-called 19900 funds), down from $56 million a year ago.

Unrestricted state funds and student tuition are budgeted across campus units as outlined in the table below.
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](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

• About MyBill: [http://studentaccounting.ucdavis.edu/bills/mybill.cfm](http://studentaccounting.ucdavis.edu/bills/mybill.cfm)

• 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**
  - Encourage them to check every month!
Online Financial Applications and Systems

- **Reading the Student Billing Statement**
- [http://studentaccounting.ucdavis.edu/bills/billkey.cfm?opt=1](http://studentaccounting.ucdavis.edu/bills/billkey.cfm?opt=1)
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.

- **AggieCard**
  - Official UC Davis identification card
  - 161A Memorial Union, Monday–Friday, 10:00 a.m. to 4:00 p.m.
Online Financial Applications and Systems

- **GLACIER Nonresident Tax Compliance System:**

- 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.
Direct Deposit – TSAAREV EFT field
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.
Types of Funding

• How to fund your Graduate Education?

• Fellowships

• Academic Appointments

• Student Loans

• Personal Resources
Why does this presentation apply to you?

**Table 1:** The number of students who received differing types of financial support during academic year 2011-12:

<table>
<thead>
<tr>
<th>Description</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of students with only fellowship support</td>
<td>664</td>
<td>13.42%</td>
</tr>
<tr>
<td>Number of students with only loans</td>
<td>83</td>
<td>1.68%</td>
</tr>
<tr>
<td>Number of students with only an academic appointment (GSR/TA/Al/Reader)</td>
<td>1,115</td>
<td>22.54%</td>
</tr>
<tr>
<td>Number of students who received no financial support processed via UC Davis</td>
<td>580</td>
<td>11.73%</td>
</tr>
<tr>
<td>Number of students who received mixed support during the academic year</td>
<td>2,593</td>
<td>52.43%</td>
</tr>
<tr>
<td>(any combination of loan, fellowship, and/or academic appointment)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of students who received all three types of student support</td>
<td>508</td>
<td>10.27%</td>
</tr>
<tr>
<td>during the academic year (loan, academic appointment, and fellowship)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of students who received a loan</td>
<td>1,061</td>
<td>21.45%</td>
</tr>
<tr>
<td>Number of students who received a fellowship</td>
<td>3,113</td>
<td>62.94%</td>
</tr>
<tr>
<td>Number of students with any academic appointment (GSR/TA/Reader/Al)</td>
<td>3,293</td>
<td>66.58%</td>
</tr>
<tr>
<td>Total number of students with financial activity (charges and/or payments)</td>
<td>4,946</td>
<td>100.00%</td>
</tr>
</tbody>
</table>
Types of Funding

• How to fund your Graduate Education?

• Fellowships
  • External

• Academic Appointments

• Student Loans

• Personal Resources
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
- “Portable” - once awarded they can usually be taken to the student’s institution of choice
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: [http://gradstudies.ucdavis.edu/ssupport/external-fellowships-pol-proc.html](http://gradstudies.ucdavis.edu/ssupport/external-fellowships-pol-proc.html)

• **Resources for External Support**
  - Look for “Graduate Student & Postdoctoral Scholar Funding Opportunities” emails from Deborah McCook and Kristin Provost that were sent to your graduate program coordinator
  - Self-serve Online Search Engines
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
External Fellowship Resources

• WEB RESOURCES
  • Most Commonly Used Search Engines:
    • **Community of Science** = The most comprehensive list of research support available is listed in the funding opportunities database, which has over 400,000 funding opportunities. Website: http://pivot.cos.com/funding_main
    • Yahoo Education/Financial Information Site = http://dir.yahoo.com/education/Financial_Aid/Grants/
    • Grant Forward (formerly IRIS) = Search the Grant Forward Database for funding opportunities in every field from agriculture to zoology. Website: https://www.grantforward.com/index
    • UCLA GRAPES – “Graduate & Postdoctoral Extramural Support”: http://www.gdnet.ucla.edu/grpinst.htm
  • Help with Grant Writing Tips
    • The Foundation Center Web Site: grant seeking on the web, grant writing seminars and tips, sources (see URL http://fdncenter.org/)
    • Faculty & Program Advisors = "your new best friends"
  • Professional Organizations
External Fellowship Resources

• Office of Graduate Studies
  • Current grants and fellowships: http://gradstudies.ucdavis.edu/current-students/financial-support/external-fellowships/fellowships-approaching-deadlines
  • External Fellowship Application Procedure: http://gradstudies.ucdavis.edu/current-students/financial-support/external-fellowships/apply-external-fellowship
  • Comprehensive list of fellowships and grants: http://gradstudies.ucdavis.edu/current-students/financial-support/external-fellowships/z-listing
  • Resources: http://gradstudies.ucdavis.edu/current-students/financial-support/external-fellowships/external-support-resources
    • Fellowship Announcements
    • International Student Resources
    • Search Engines
    • Writing Resources

• GradLink
  • A weekly e-newsletter publication (e-GradLink) that is e-mailed to graduate students and postdoctoral scholars through graduate program staff and postdoctoral listservs.
  • http://gradstudies.ucdavis.edu/current-students/forms-information/gradlink-newsletter
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
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
- Look for funding every year; beginning early fall for the next academic year
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.

• [Link to matching commitments policy](http://gradstudies.ucdavis.edu/current-students/financial-support/external-fellowships/matching-commitments)
# External Fellowships - *Guidelines for Payment*

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

• How to fund your Graduate Education?

• Fellowships
  • Internal
  • GPFA

• Academic Appointments

• Student Loans

• Personal Resources
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)
Graduate Program Fellowship Allocation

- Graduate programs receive an allocation of funds to award fellowships to new and continuing students.
  - Allocation based on three year, weighted, average enrollment
  - For 2014-15, use 2011-12, 2012-13, 2013-14 actual enrollment at time of Fall census
  - Masters weight = 1, MFA = 1.75, PhD = 2

- Awards may be in the form of living allowance (stipend), Tuition & Fees, or Nonresident Supplemental Tuition fellowships

- *New for 2014-15, can be awarded during the summer term (stipends to continuing students only). Summer is the beginning quarter of the fiscal year. Summer stipends for Aug – Oct, 2015, are paid from your 2015-16 allocation.

- **Cannot** be used to:
  - Bring students to campus for pre- or post-admissions recruitment visits
  - Fund research costs
  - To fund TA or GSR appointments
    - No expectation of research or teaching effort can be tied to a Graduate Program Fellowship.
Graduate Program Fellowship Allocation

Revised Carry-forward Policy for 2014-15 to 2015-16

- This policy applies to the following fellowship programs:
  - Graduate Program Fellowship Allocation (GPFA)
  - Dean’s Graduate Support Allocation (funds provided by Graduate Studies) (DGSA)
  - Supplemental Graduate Program NRST Allocation (SGPNA)

- For 2014-15, programs will be permitted to carry forward 5% of the allocations under each of these programs without requesting permission.

- Should your program wish to carry forward funds in excess of 5% from any of the above programs for your use in 2015-16, please email an exception request with justification to Steven Albrecht.
  - Carry-forward exception requests must be submitted by Friday, May 15, 2015.
  - A reminder (with current account balance information) will be sent to all programs in March.
Graduate Program Fellowship Allocation Funds

• IMPORTANT DATES TO REMEMBER
  • March 2\textsuperscript{nd} = Priority Deadline for students to file a FAFSA.
  
  • April 15\textsuperscript{th} = Programs cannot require students to respond to fellowship offers prior to April 15\textsuperscript{th} (CGS Resolution).
  
  • Third week of September = It is strongly suggested that all GPFA awards be entered into GradTrack\$ before fall Tuition & Fees are due.
  
  • May 15\textsuperscript{th} = Exception requests for carry-forward due.
  
  • June 1\textsuperscript{st} = final day to post Grad Program Fellowships in GT\$. 
Graduate Program Fellowship Allocation

• Stipends
  • Awarded every quarter as One-time or Monthly
  • First fall quarter payment is Nov 1st
  • US Citizens & Permanent Residents paid via Banner.
    • Disbursements post to student accounts on Mon, Wed, & Fri.
      • Direct Deposit (post to student’s bank account three business days after posting to UC Davis student account)
      • Paper check from Student Accounting (pick up paper checks in Dutton Hall)
    • No same-day or next-day checks possible
    • Monday -> Check usually available for pickup Wednesday after 2:00pm (sometimes Thursday a.m.)
    • Wednesday -> Check available for pickup Friday after 2:00pm
    • Friday -> Check available for pickup Tuesday after 2:00pm
  • No tax withholding
  • Outstanding student balance deducted from payment
Graduate Program Fellowship Allocation
Enter stipend awards by term (quarter) using YPAGWRD, stipends disburse monthly or one-time

$1,500 stipend entered monthly (M) in GT$ for 201501 disburses as $500 on Feb 01st, March 01st, and April 01st

Actual 2014-15 Disbursement Dates

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Term</th>
<th>Year</th>
<th>Month</th>
<th>Day</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer</td>
<td>201408</td>
<td>2014</td>
<td>JUL</td>
<td>24</td>
</tr>
<tr>
<td>Summer</td>
<td>201408</td>
<td>2014</td>
<td>AUG</td>
<td>26</td>
</tr>
<tr>
<td>Summer</td>
<td>201408</td>
<td>2014</td>
<td>SEP</td>
<td>23</td>
</tr>
<tr>
<td>Fall</td>
<td>201410</td>
<td>2014</td>
<td>OCT</td>
<td>24</td>
</tr>
<tr>
<td>Fall</td>
<td>201410</td>
<td>2014</td>
<td>NOV</td>
<td>20</td>
</tr>
<tr>
<td>Fall</td>
<td>201410</td>
<td>2014</td>
<td>DEC</td>
<td>16</td>
</tr>
<tr>
<td>Winter</td>
<td>201501</td>
<td>2015</td>
<td>JAN</td>
<td>23</td>
</tr>
<tr>
<td>Winter</td>
<td>201501</td>
<td>2015</td>
<td>FEB</td>
<td>20</td>
</tr>
<tr>
<td>Winter</td>
<td>201501</td>
<td>2015</td>
<td>MAR</td>
<td>24</td>
</tr>
<tr>
<td>Spring</td>
<td>201503</td>
<td>2015</td>
<td>APR</td>
<td>24</td>
</tr>
<tr>
<td>Spring</td>
<td>201503</td>
<td>2015</td>
<td>MAY</td>
<td>21</td>
</tr>
<tr>
<td>Spring</td>
<td>201503</td>
<td>2015</td>
<td>JUN</td>
<td>18</td>
</tr>
</tbody>
</table>
Graduate Program Fellowship Allocation

- **International Student Stipends**
  - Enter award in Banner and then Grad Studies (Tracey Pereida) will send payroll instructions to appropriate departmental contact
  - Disbursed via PPS according to monthly payroll calendar
    - Payments disburse the 1st of every month
    - Must enter in GT$ by the 15th of the month
    - If monthly deadline missed, program payroll staff can go to biweekly schedule or emergency check
  - Usually tax withholding
  - Changes to stipend awards in GT$ must also be changed in PPS
  - Network with your payroll staff!
Graduate Program Fellowship Allocation

- International Student Stipends
- Identify by “P” fund codes: FxxxP on YPAGWRD
Graduate Program Fellowship Allocation

- International Student Stipends
  - Identify by “P-Code Report” on GT$ web query
Graduate Program Fellowship Allocation

- International Student Stipends
- Citizen Type & Visa on ZPAPERQ
Graduate Student Fellowship Stipend Process

Program enters all stipend fellowships into Grad Track$

Is the student a US Citizen or Permanent Resident?

Yes

Disbursement paid to student via Banner (Mon/Wed/Fri)

No

OGS will email PPS instructions to program

Program enters stipend into PPS (title code 9995)

Disbursement paid to student via PPS (monthly compute)

$$ amounts in both systems should always equal!
Graduate Program Fellowship Allocation

• **Tuition & Fee Fellowships**
  • Full or partial
  • Fee due dates: [http://registrar.ucdavis.edu/calendar/index.cfm](http://registrar.ucdavis.edu/calendar/index.cfm)
  • Disbursement Dates (Sept 22\textsuperscript{nd}, Dec 26\textsuperscript{th}, & Mar 20\textsuperscript{th})
  • UC SHIP – If the student opts out of UC SHIP, unused fee awards can not generate a refund to the student
    • We will notify you of over-awards and ask you to correct

• **Nonresident Supplemental Tuition Fellowships**
  • Full or partial
  • Zero for three calendar years after advancement to candidacy. The fourth and fifth years, after advancement to candidacy, paid by Post-candidacy NRST Fellowship program.
Graduate Program Fellowship Allocation

- **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](http://budget.ucdavis.edu/studentfees)).
  - Miscellaneous fees such as those for PELP, Filing Fee, advancement to candidacy, course materials, SISS services fee, the new $150 Office of the University Registrar Document Fee, library charges, health center charges, etc. may not be paid on behalf of students by directly charging them to GPFA funds. Those fees are wholly the responsibility of the student. Furthermore, there is no accounting mechanism to charge those costs to GPFA accounts as fee awards. In theory, programs could award small (taxable) stipends to students to cover those fees. However, considering the workload and transaction costs, Graduate Studies will not process small miscellaneous stipends (generally not less than $500).
### Graduate Student Fees 2014-15

<table>
<thead>
<tr>
<th>Graduate Student Fees</th>
<th>Fall</th>
<th>Winter</th>
<th>Spring</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>GSA Fee</td>
<td>$12.00</td>
<td>$12.00</td>
<td>$12.00</td>
<td>$36.00</td>
</tr>
<tr>
<td>Memorial Union Fee</td>
<td>$28.50</td>
<td>$28.50</td>
<td>$28.50</td>
<td>$85.50</td>
</tr>
<tr>
<td>Facilities and Campus Enhancements Fee</td>
<td>$134.83</td>
<td>$134.83</td>
<td>$134.83</td>
<td>$404.49</td>
</tr>
<tr>
<td>Campus Expansion Initiative</td>
<td>$64.21</td>
<td>$64.20</td>
<td>$64.20</td>
<td>$192.61</td>
</tr>
<tr>
<td>Student Facilities Safety Fee</td>
<td>$22.00</td>
<td>$22.00</td>
<td>$22.00</td>
<td>$66.00</td>
</tr>
<tr>
<td>Student Services Health Fee</td>
<td>$44.00</td>
<td>$44.00</td>
<td>$44.00</td>
<td>$132.00</td>
</tr>
<tr>
<td>Health Insurance (UC SHIP)</td>
<td>$1,144.00</td>
<td>$1,144.00</td>
<td>$1,144.00</td>
<td>$3,432.00</td>
</tr>
<tr>
<td>Student Services Fee (formerly Registration Fee)</td>
<td>$324.00</td>
<td>$324.00</td>
<td>$324.00</td>
<td>$972.00</td>
</tr>
<tr>
<td>Tuition (formerly Educational Fee)</td>
<td>$3,740.00</td>
<td>$3,740.00</td>
<td>$3,740.00</td>
<td>$11,220.00</td>
</tr>
<tr>
<td><strong>Subtotal - Graduate fees 2014-15</strong></td>
<td><strong>$5,513.54</strong></td>
<td><strong>$5,513.53</strong></td>
<td><strong>$5,513.53</strong></td>
<td><strong>$16,540.60</strong></td>
</tr>
<tr>
<td>Nonresident Supplemental Tuition</td>
<td>$5,034.00</td>
<td>$5,034.00</td>
<td>$5,034.00</td>
<td>$15,102.00</td>
</tr>
<tr>
<td><strong>Total - Nonresidents 2014-15</strong></td>
<td><strong>$10,547.54</strong></td>
<td><strong>$10,547.53</strong></td>
<td><strong>$10,547.53</strong></td>
<td><strong>$31,642.60</strong></td>
</tr>
</tbody>
</table>
Graduate Program Fellowship Allocation
Notification of Awards

- **Award letter best practices and attachments:**

- **Offer in writing**
  - Acknowledge named endowments
  - Grad Program Fellowship Allocation Summary:
    - UC Davis Graduate Program Fellowship Allocation: $7,920,095
    - **R. Pardow Hooper Fellowship**: $7,947,144
  - List academic appointments separately
  - Attachments to offer letter:
  - All subsequent changes must be in writing
  - Recheck Student Eligibility at award time
Notification of Awards

Dear «First_Name»,

Congratulations! On behalf of the Office of Graduate Studies and the <<Graduate Program Name>>, I am pleased to offer you financial support in the form of the 2012-13 <<Fellowship Name from BG allocation letter>> Fellowship. The details of your award are as follows:

- or, if generic BG funds: I am pleased to offer you financial support in the form of a fellowship. The details of your award are as follows:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Stipend</td>
<td>$9,000.00</td>
</tr>
<tr>
<td>2012-13 full In-State Fees (estimated)</td>
<td>$15,271.44</td>
</tr>
<tr>
<td>2012-13 partial Nonresident Supplemental Tuition</td>
<td>$5,034.00</td>
</tr>
<tr>
<td>Total Amount of Fellowship (approximation)</td>
<td>$29,305.44</td>
</tr>
</tbody>
</table>

<<Use this paragraph for domestic students>> Your stipend will be paid monthly in nine equal installments of $1,000.00 through the Student Accounting Office, 2112 Dutton Hall, beginning November 1, 2012, and ending July 1, 2013. For tax information please refer to the enclosure “Regulations for Graduate Students Receiving Fellowships”. Information about Direct Deposit may be found here: http://accounting.ucdavis.edu/directdep.cfm. This award requires the filing of a Free Application for Federal Student Aid (FAFSA): http://www.fafsa.ed.gov.

<<Use this paragraph for international students>> Your stipend will be paid monthly in nine equal installments through the UC Davis Payroll System beginning November 1, 2012 and ending July 1, 2013. Depending on your individual circumstances, withholding tax may be deducted from each of your monthly stipend payments. For tax information, please refer to the enclosed “Regulations for Graduate Students Receiving Fellowships”. Information about Direct Deposit may be found at http://accounting.ucdavis.edu/directdep.cfm.

Please note that fellowships do not disburse until you enroll in classes. Acceptance of any other funding or academic employment could affect this award and should be reported immediately.

Because fees are subject to gubernatorial, legislative and Regental action, adjustments will be made to your award for actual 2012-13 fees and nonresident supplemental tuition amounts. Unused fee awards will not generate a refund to you. Your billing statement should reflect a credit for full fees. <<- or, if partial fee award: “Your billing statement should reflect a credit for fees in the amount shown above.”>> If there is a discrepancy, please contact <<grad program contact name & email>>.
Notification of Awards

Council of Graduate Schools

Resolution Regarding Graduate Scholars, Fellows, Trainees and Assistants

Acceptance of an offer of financial support *(such as a graduate scholarship, fellowship, traineeship, or assistantship)* for the next academic year by a prospective or enrolled graduate student completes an agreement that both student and graduate school expect to honor. In that context, the conditions affecting such offers and their acceptance must be defined carefully and understood by all parties.

Students are under no obligation to respond to offers of financial support prior to April 15; earlier deadlines for acceptance of such offers violate the intent of this Resolution. In those instances in which a student accepts an offer before April 15, and subsequently desires to withdraw that acceptance, the student may submit in writing a resignation of the appointment at any time through April 15. However, an acceptance given or left in force after April 15 commits the student not to accept another offer without first obtaining a written release from the institution to which a commitment has been made. Similarly, an offer by an institution after April 15 is conditional on presentation by the student of the written release from any previously accepted offer. It is further agreed by the institutions and organizations subscribing to the above Resolution that a copy of this Resolution or a link to the URL should accompany every scholarship, fellowship, traineeship, and assistantship offer.

The following list includes CGS member institutions that indicated their support of the Resolution.

This Resolution was renewed October 2009.
Regulations for Receiving Fellowships

• Must report changes in major, program, deferring admissions, below minimum GPA, reduction in enrollment units, or multiple fee awards (GSR or TA fee 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)

• Not portable

• Minimum GPA of 3.0

• Maintain satisfactory academic progress

• Can only accept a single stipend in excess of $10,000
Student Eligibility – Exception Process

- The Office of Graduate Studies audits the students’ fellowship eligibility – GPA, academic standing, enrolled units, etc.

- If the student does not meet the minimum level of requirements a notice is sent to the Graduate Program with two options:
  1. Cancel the awards (as the student is no longer eligible)
  2. Request an exception to continue to pay the awards to the student. The written exception request must include:
     - A brief explanation for the low G.P.A. or Academic Probation status
     - What steps will be taken to reestablish the minimum G.P.A. or change Student Status to “Good Academic Standing”

The Exception Request is reviewed and approved/denied by the Associate Dean of Graduate Studies.
Graduate Program Fellowship Allocation

- Grad Track$ Web Reports
  - [https://apps.gradstudies.ucdavis.edu/gradtracks/](https://apps.gradstudies.ucdavis.edu/gradtracks/)
  - Use to monitor account balances
    - Does not include NRSTR diversion expenses!
  - Look up accounts to see if a fund code request is necessary
  - Zero small balances before June 1st

<table>
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<tr>
<th>Major</th>
<th>Aid Year</th>
<th>Account Number</th>
<th>Amount Allocated</th>
<th>Amount Awarded</th>
<th>Amount Pending</th>
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<td></td>
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<td><strong>$163,693.94</strong></td>
<td><strong>$163,233.29</strong></td>
<td><strong>$0</strong></td>
<td><strong>$460.65</strong></td>
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Types of Funding

• How to fund your Graduate Education?

• Fellowships
  • Internal
  • OGS Competition

• Academic Appointments

• Student Loans

• Personal Resources
Internal Fellowship Application Process

• 50 restricted endowment fellowships (34 continuing and 16 prospective)
  • Approximately 175 awards (range from $1,500 research allowance to $70,000 multi-year award)
  • Application posted on Graduate Studies website
    • [http://gradstudies.ucdavis.edu/prospective-students/apply-online](http://gradstudies.ucdavis.edu/prospective-students/apply-online)
  • Please promote to your continuing students (promotional email provided on 9/22/14)
  • Please nominate a faculty member to participate on review committee

• Required Application Materials
  • Online Application
    • Essays (statement of purpose & personal history statement)
  • Transcripts
    • For continuing students, no paper transcripts required. GARD will link to Banner.
  • 3 Letters of Recommendation

<table>
<thead>
<tr>
<th>2012-13</th>
<th>Stats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total number of unique students nominated</td>
<td>935</td>
</tr>
<tr>
<td>Total number of programs who nominated students</td>
<td>75</td>
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<tr>
<td>Most students nominated by a single program</td>
<td>41</td>
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<tr>
<td>Least number of students nominated by a program (2)</td>
<td>2</td>
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<tr>
<td>Average number of students nominated per program</td>
<td>12.3</td>
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## Internal Fellowships

<table>
<thead>
<tr>
<th>Fellowship Name</th>
<th>Eligible</th>
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<tbody>
<tr>
<td>Cota Robles, Eugene</td>
<td>Prospective</td>
</tr>
<tr>
<td>Elliott, Marjorie and Charles</td>
<td>Prospective</td>
</tr>
<tr>
<td>Gibeling, Jeffery and Marsha</td>
<td>Prospective</td>
</tr>
<tr>
<td>Graduate Scholars Fellowship</td>
<td>Prospective</td>
</tr>
<tr>
<td>IRT Undergrad Preparation</td>
<td>Prospective</td>
</tr>
<tr>
<td>Jones, Fletcher</td>
<td>Prospective</td>
</tr>
<tr>
<td>Kraft, Herbert</td>
<td>Prospective</td>
</tr>
<tr>
<td>McCalla, Alex and Phyllis Int'l Grad Student Support Award</td>
<td>Prospective</td>
</tr>
<tr>
<td>McNair</td>
<td>Prospective</td>
</tr>
<tr>
<td>NIH Undergrad Preparation (RISE, NIGMS, MARC U-STAR)</td>
<td>Prospective</td>
</tr>
<tr>
<td>NSF Undergrad Preparation (LSAMP, UC CAMP)</td>
<td>Prospective</td>
</tr>
<tr>
<td>Provost's First Year Fellowship</td>
<td>Prospective</td>
</tr>
<tr>
<td>Schwall Medical Fellowship, Floyd and Mary</td>
<td>Prospective</td>
</tr>
<tr>
<td>Steindler, John F</td>
<td>Prospective</td>
</tr>
<tr>
<td>Vanderhoef Int'l Grad Student Fellowship</td>
<td>Prospective</td>
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<tr>
<td>Zolk, George and Dorothy</td>
<td>Prospective</td>
</tr>
<tr>
<td>Bilinski, Russell &amp; Dorothy Educational Foundation</td>
<td>Continuing</td>
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<tr>
<td>Crosby, Donald</td>
<td>Continuing</td>
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<tr>
<td>Dissertation Year Fellowship</td>
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<tr>
<td>Faulkner, Richard and Kate</td>
<td>Continuing</td>
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<tr>
<td>Foin, Theodore and Angela</td>
<td>Continuing</td>
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<tr>
<td>Gibeling, Alfred H. &amp; Marie E.</td>
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<tr>
<td>Godoy, Loreto Memorial Fellowship</td>
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<td>Ellen Gold Epidemiology</td>
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<td>Golden International Agriculture, William G. and Kathleen</td>
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<td>Graduate Research Mentorship</td>
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<td>Hillyer, Ted and Silvia</td>
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<td>Jacobsen, Stanley &amp; Werner, Emily</td>
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<td>Krantz, Bert and Nell</td>
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<td>Lee, George</td>
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<tr>
<td>Lyons, Austin Eugene</td>
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<td>McKeehan, Beatrice Oberly and S. Atwood</td>
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<td>Richards, Lillie May</td>
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<tr>
<td>Saxon, Leland Roy &amp; Georgia Wood</td>
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<td>Schwall Medical Fellowship, Floyd and Mary</td>
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<td>Schwall Dissertation Year Fellowship, Floyd and Mary</td>
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<td>James and Rita Seiber Int’l Grad Student Fellowship</td>
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<td>Stacey, Malcolm</td>
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<td>Telford, Tara K.</td>
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<tr>
<td>Tryon, Herbert</td>
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<td>Provost’s Dissertation Year Fellowship</td>
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<td>UCD &amp; Humanities Graduate Research</td>
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<td>UCD Dissertation Year Fellowship</td>
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<tr>
<td>Velez, Miguel</td>
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</tr>
<tr>
<td>Walker, Frank and Carolan</td>
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<tr>
<td>Wood, Elizabeth P.</td>
<td>Continuing</td>
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<tr>
<td>Wright, Jarena</td>
<td>Continuing</td>
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</table>
Continuing Student and Prospective Student Internal Fellowship Competition

- Programs rank and nominate students
  - On-line review by the program (GARD)
  - Do students meet criteria?
    - For example, the diversity criteria
  - Meet deadlines for submission: Continuing = Dec 15\(^{th}\); Prospective = Feb 5\(^{th}\)
- Evaluate in a timely fashion, assemble committees and schedule meetings well before deadlines
  - Meet between Dec 2\(^{nd}\) and Dec 12\(^{th}\) for continuing ranking
  - Meet between Jan 19\(^{th}\) and Jan 30\(^{th}\) for prospective ranking
- Please encourage your faculty members to participate as reviewers for the Support Committee of Graduate Council
Fellowship Process Training Session
  - Tuesday, November 18th, 203 Mrak Hall

Fellowship process highlights
  - Manage Users
    - Faculty reviewer access
  - Audit and nomination
    - Letters of reference and transcripts
    - Consider Applicant
    - Nominate Functionality – “Add a Fellowship” link
  - Graduate Scholars Fellowship (PhD & MFA Only)
    - GRE score verification
      - One official or one verified required
    - Verify Fellowship GPA (see calculator)
  - Overall Ranking
  - Final Submission
Internal Fellowship Formula

• **Factors:**
  - GPA
  - Financial Support subcommittee Member Ranking (2) = S&W1 and S&W2
  - Program Rank = Prog Rank
  - GRE Verbal = GREv
  - GRE Analytical = GREa
  - GRE Quantitative = GREq

• **Prospective student formula:**
  \[(GPA \text{ score} + GRE \text{ average} + S&W1 \text{ score} + S&W2 \text{ score} + 2*Program \text{ Rank Score})/6 = Fellowship \text{ score}\]

• **Continuing student formula:**
  \[(GPA \text{ score} + S&W1 \text{ score} + S&W2 \text{ score} + 2*Program \text{ Rank Score})/5 = Fellowship \text{ score}\]

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.
Continuing Student and Prospective Student Internal Fellowship Competition

**Deadlines**

- **December 1st**: Fellowship applications from *continuing* students through ApplyYourself
  - Letters of reference should be submitted as close to the 1st as possible
- **December 15th**: Graduate Programs forward nominations for *continuing* students to OGS via GARD
- **January 15th**: Fellowship applications from *prospective* students through ApplyYourself (Individual Programs could have earlier deadline)
  - Letters of reference and transcripts should be submitted as close to the 15th as possible
- **February 5th**: Graduate Programs forward nominations for *prospective* students to OGS via GARD
- **March**: The Office of Graduate Studies begins emailing offer letters to students; copies are sent to graduate programs
- **April 15th**: Final date for *prospective* students to accept or decline fellowship award offers, in writing
Types of Funding

• How to fund your Graduate Education?

• Fellowships
  • Miscellaneous

• Academic Appointments

• Student Loans

• Personal Resources
Supplemental Grad Program NRST Allocation

- New funding for 2014-15, based on the enrollment numbers of your students who meet the following criteria:
  - Citizenship = Nonresident Alien
  - Degree Objective = PhD or MFA
  - Enrollment = Pre-candidacy and in their second or third year (4th through 9th quarters)

- The funding may be used for two purposes:
  - **Graduate Fellowships**: Living allowance (stipend), Tuition & Fees, and/or NRST for any eligible student
    - Not required to pay these funds to the students included in the enrollment allocation calculation
    - Award through Grad Track$
  - **Graduate Instruction**: To buy-out a regular lecturer or to hire a faculty member to teach a course.
    - This option is primarily intended to assist graduate groups with funding core courses.
Supplemental Grad Program NRST Allocation

- Distributed in two ways:
  - **GSR Remission Buy-down Program**: For the students in your program who meet the criteria, the GSR Buy-down program has been expanded to cover 100% of their assessed NRST remission (up from 25%).
    - The buy-down program does not require any action by departmental or graduate program staff, as the rebate is automatic and posts to the eligible GSR fund source in the same fiscal period as the remission expense.
  - **Supplemental Grad Program NRST Allocation**: For the students in your program who meet the criteria, this allocation is calculated as follows: “Supplemental Grad Program NRST Allocation” = “Total amount of NRST assessed in a three quarter period” minus “Total NRST remission rebated via the buy-down program, for those same students, in the same three quarter period”.
## Supplemental Grad Program NRST Allocation

### ADMITTED FALL 2014

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<tr>
<th>Quarter Count</th>
<th>Year Count</th>
<th>Term Code</th>
<th>Academic Year</th>
<th>Quarter</th>
<th>NRST Assessment*</th>
<th>Eligible for Supplemental Allocation</th>
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<td>1</td>
<td>First</td>
<td>201410</td>
<td>2014-15</td>
<td>Fall</td>
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<td>2</td>
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<td>201710</td>
<td>2017-18</td>
<td>Fall</td>
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</table>
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 Dec 15th and May 15th
- Students may only win once
- Award amount varies by destination ($250 for CA, $500 CONUS, or $1,000 OCONUS)
- $25,000 awarded twice per year
- Three nominations allowed per Grad Program –
  - Please inform those not nominated that they didn’t win!
- Application form and instructions here: http://gradstudies.ucdavis.edu/current-students/financial-support/internal-fellowships/travel-awards
- Different from the GSA Travel Award - http://gsa.ucdavis.edu/Travel_Award
Dean’s Graduate Support Allocation (DGSA)

- Matching program with Deans’ Offices
- Programs receive allocations directly from Dean’s Office
  - Allocations announced around mid-February
  - Dean’s Office may include restrictions or earmark funds for specific students
- Award through Grad Track$
Summer GSR Awards

- 100% GSR support for Engineering or Computer-related Applications and Methods
  - Three months (July, Aug, Sept) of support at Step 1
  - Awarded through PPS not GT$
- Programs must commit to two quarters of equal support during next academic year
- Dates
  - Nominations to OGS by May 1, 2015
  - Awards announced week of June 1, 2015
- Summer GSR Award Nomination Form
Fellowship payment with Departmental Funds

• Grad Studies Banner Fund Code Request Form
  • Account must have Higher Ed Function Code of “FINA”
  • Transfer funds, via KFS BA, to FINA account
  • OGS will enter allocation into Grad Track$ and program staff will enter awards

• Grad Studies Fellowship Payment Request Form
  • Intended for staff who do not have Grad Track$ access

• How To Pay a Fellowship:
Post-Candidacy NRST Fellowship Program

- UC policy is that nonresident doctoral students do not pay NRST for a period of three years after they advance to candidacy.
- Doctoral students who remain in candidacy beyond the three year waiver period will be eligible to receive a non-competitive NRST fellowship for two years.
  - The NRST fellowship must be applied for each year.
  - An email with application information will be sent to all eligible students.
- Typical funding timeline: 2-3 years prior to candidacy with NRST paid from a grant (if they are a GSR), the 3 year waiver period, and up to 2 years of post-candidacy NRST fellowship.
  - GSRs are eligible for NRST remission as a benefit of employment only prior to advancing to candidacy.
  - Students who are beyond this time will be eligible to receive NRST fellowships, but NRST remission will not be a mandatory benefit of their appointment.
Provost’s First Year and Dissertation Year Fellowships in the Arts, Humanities and Social Sciences

- For highly qualified doctoral and master of fine arts students in the Arts, Humanities, and Social Sciences.
- $2 million annual allocation from the Provost
- 50 First Year Fellowship offers are allocated to participating graduate programs
  - Recruiting offers that cannot be re-awarded
  - Graduate programs send their own First-Year offers
  - Offers should be sent to students by March 1st, with copies of letters to Ruth Lee
  - Funds for declined offers transferred to Dissertation Year Fellowships
- Each fellowship includes a 12-month stipend of $25,000 and payment of fees and tuition.
- Individual graduate programs are responsible for providing any necessary nonresident supplemental tuition awards.
Provost’s First Year and Dissertation Year Fellowships in the Arts, Humanities and Social Sciences

- Students from these graduate programs are eligible: Agricultural and Resource Economics, Anthropology, Art Studio, Communication, Comparative Literature, Cultural Studies, Design, Dramatic Art, Economics, English, French, Geography, German, History, Human Development, Linguistics, Music, Native American Studies, Performance Studies, Philosophy, Political Science, Psychology, Sociology, and Spanish.

- Funds for declined offers transferred to Dissertation Year Fellowships
  - Each fellowship includes a 12-month stipend of $25,000 and payment of fees and tuition.
  - Ensure sufficient applicants for Provost’s Dissertation Year Fellowship prior to December 1st.
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 $600 to $1,300 per quarter for child care expense

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: [http://gradstudies.ucdavis.edu/current-students/financial-support/internal-fellowships/dean-witter-fund](http://gradstudies.ucdavis.edu/current-students/financial-support/internal-fellowships/dean-witter-fund)
Types of Funding

• How to fund your Graduate Education?

  • Fellowships

  • Academic Appointments

  • Student Loans

  • Personal Resources
Graduate Program Fellowship Allocation

- **Academic Appointments**
  - Tuition & Fee and NRST Remissions
    - Benefit of employment if FTE is 25% or more
    - Remission takes precedence over Graduate Program fellowship
      - If fellowship blocking remission, we will notify you to remove the award
  - Amounts per title code vary:
    - [http://studentaccounting.ucdavis.edu/feeremissions.cfm](http://studentaccounting.ucdavis.edu/feeremissions.cfm)
    - GSR: full fee and nonresident supplemental tuition remission (NRSTR)
    - TA: partial fee remission and $136 NRSTR
      - Student responsible for $261.54 in fees per quarter in 2014-15
      - You may pay the full NRST and the $261.54 with your GPFA
  - NRSTR diversion exceptions based on salary fund source: [http://www.gradstudies.ucdavis.edu/facstaff/nrt_exception.html](http://www.gradstudies.ucdavis.edu/facstaff/nrt_exception.html)
# Fee Remission Summary

http://studentaccounting.ucdavis.edu/feeremissions.cfm

## Fee Remission for CA residents 2014-15:

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<th>GSR:</th>
<th>Quarter</th>
<th>Registration</th>
<th>Health</th>
<th>Amount Student Pays</th>
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<td>GSR:</td>
<td>Fall, Winter &amp; Spring:</td>
<td>$4,325.53</td>
<td>+</td>
<td>$0.00</td>
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<td>TA:</td>
<td>Fall, Winter, &amp; Spring:</td>
<td>$4,064.00</td>
<td>+</td>
<td>$261.53</td>
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</table>

## Fee Remission for non-residents 2014-15:

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<th>Quarter</th>
<th>Registration</th>
<th>Health</th>
<th>NRST</th>
<th>Amount Student Pays</th>
</tr>
</thead>
<tbody>
<tr>
<td>GSR:</td>
<td>Fall, Winter &amp; Spring:</td>
<td>$4,325.53</td>
<td>+</td>
<td>$1,188.00</td>
<td>$5,034.00</td>
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<tr>
<td>TA:</td>
<td>Fall, Winter, &amp; Spring:</td>
<td>$4,064.00</td>
<td>+</td>
<td>$1,188.00</td>
<td>$136.00</td>
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</table>
# 2014-15 Graduate Student Fees not covered by TA remission

<table>
<thead>
<tr>
<th>Graduate Student Fees</th>
<th>Fall</th>
<th>Winter</th>
<th>Spring</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>GSA Fee</td>
<td>$12.00</td>
<td>$12.00</td>
<td>$12.00</td>
<td>$36.00</td>
</tr>
<tr>
<td>Memorial Union Fee</td>
<td>$28.50</td>
<td>$28.50</td>
<td>$28.50</td>
<td>$85.50</td>
</tr>
<tr>
<td>Facilities and Campus Enhancements Fee</td>
<td>$134.83</td>
<td>$134.83</td>
<td>$134.83</td>
<td>$404.49</td>
</tr>
<tr>
<td>Campus Expansion Initiative</td>
<td>$64.21</td>
<td>$64.20</td>
<td>$64.20</td>
<td>$192.61</td>
</tr>
<tr>
<td>Student Facilities Safety Fee</td>
<td>$22.00</td>
<td>$22.00</td>
<td>$22.00</td>
<td>$66.00</td>
</tr>
<tr>
<td>Student Services Health Fee</td>
<td>$44.00</td>
<td>$44.00</td>
<td>$44.00</td>
<td>$132.00</td>
</tr>
<tr>
<td>Health Insurance (UC SHIP)</td>
<td>$1,144.00</td>
<td>$1,144.00</td>
<td>$1,144.00</td>
<td>$3,432.00</td>
</tr>
<tr>
<td>Student Services Fee (formerly Registration Fee)</td>
<td>$324.00</td>
<td>$324.00</td>
<td>$324.00</td>
<td>$972.00</td>
</tr>
<tr>
<td>Tuition (formerly Educational Fee)</td>
<td>$3,740.00</td>
<td>$3,740.00</td>
<td>$3,740.00</td>
<td>$11,220.00</td>
</tr>
<tr>
<td><strong>Subtotal - Graduate fees 2014-15</strong></td>
<td><strong>$5,513.54</strong></td>
<td><strong>$5,513.53</strong></td>
<td><strong>$5,513.53</strong></td>
<td><strong>$16,540.60</strong></td>
</tr>
<tr>
<td>Nonresident Supplemental Tuition</td>
<td>$5,034.00</td>
<td>$5,034.00</td>
<td>$5,034.00</td>
<td>$15,102.00</td>
</tr>
<tr>
<td><strong>Total - Nonresidents 2014-15</strong></td>
<td><strong>$10,547.54</strong></td>
<td><strong>$10,547.53</strong></td>
<td><strong>$10,547.53</strong></td>
<td><strong>$31,642.60</strong></td>
</tr>
</tbody>
</table>
**Tuition & Fee Remission Example**

**Spring Tuition & Fee charges = $5,367.53**

<table>
<thead>
<tr>
<th>Account Details</th>
<th>Description</th>
<th>Term</th>
<th>Charge</th>
<th>Payment</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>R011</td>
<td>Grad Fall Qtr Tuition &amp; Fees</td>
<td>201401</td>
<td>4,369.54</td>
<td></td>
<td></td>
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<tr>
<td>GINF</td>
<td>Fall Grad Health Ins (SHIP)</td>
<td>201401</td>
<td>1,144.00</td>
<td></td>
<td></td>
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<tr>
<td>XWCK</td>
<td>Payment received - Thank You</td>
<td>201401</td>
<td>20.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SHCS</td>
<td>Health Center Charge</td>
<td>201401</td>
<td>20.00</td>
<td></td>
<td></td>
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<tr>
<td>GRAS</td>
<td>Grad RA Fee Rem Spring</td>
<td>201401</td>
<td>1,042.00</td>
<td></td>
<td></td>
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<tr>
<td>GHRW</td>
<td>Grad RA Health Ins Rem-Winter</td>
<td>201401</td>
<td>1,042.00</td>
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<td></td>
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<tr>
<td>R013</td>
<td>Grad Spr Qtr Tuition &amp; Fees</td>
<td>201401</td>
<td>1,042.00</td>
<td></td>
<td></td>
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<tr>
<td>GINS</td>
<td>Spr Grad Health Ins (SHIP)</td>
<td>201401</td>
<td>998.00</td>
<td></td>
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</tbody>
</table>

**Spring GSR remission = $5,367.53**

**Query Balance** 5,513.54  **Account Balance** 5,513.54  **Amount Due** 5,513.54  **Memo Balance** 0.00  **Authorized Aid Balance** -5,513.54  **NSF** 0  **Receipt?** N
Work Study

• DEADLINES
  • October 1, 2014: Deadline for the submission of fall quarter or full year (three quarter) academic year nominations to Graduate Financial Aid
  • January 14, 2015: Deadline for winter work study nominations
    • Work-Study cannot be awarded for a quarter that has begun or cancelled retroactively
  • March 11, 2015: Deadline for spring nominations

• No reallocations or spare units

• No summer work study

• Forms, Cost calculator, Process Map, etc.: http://gradstudies.ucdavis.edu/faculty-staff/student-financial-support/work-study-graduate-students
Table 2: The cost, decentralization, and number of transactions for academic graduate student financial support in academic year (fall, winter, spring) 2011-12:

<table>
<thead>
<tr>
<th>Description</th>
<th>Cost/Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>GSR tuition &amp; fee remission</td>
<td>$20,775,492.00</td>
</tr>
<tr>
<td>GSR nonresident supplemental tuition remission</td>
<td>$2,764,935.00</td>
</tr>
<tr>
<td>GSR salary</td>
<td>$15,971,921.42</td>
</tr>
<tr>
<td>Number of general ledger accounts on which GSR’s were hired</td>
<td>2,948</td>
</tr>
<tr>
<td>Number of different general ledger Organizations on which GSR’s were hired</td>
<td>926</td>
</tr>
<tr>
<td>Number of different staff account managers for general ledger accounts on which GSR’s were hired</td>
<td>232</td>
</tr>
<tr>
<td>Number of different Principal Investigators for general ledger accounts on which GSR’s were hired</td>
<td>798</td>
</tr>
<tr>
<td>TA/Reader/Al tuition &amp; fee remission</td>
<td>$18,977,426.00</td>
</tr>
<tr>
<td>TA/Reader/Al salary</td>
<td>$16,826,281.26</td>
</tr>
<tr>
<td>Number of general ledger accounts on which TA’s/Readers/Al’s were hired</td>
<td>218</td>
</tr>
<tr>
<td>Total Loans</td>
<td>$13,604,124.44</td>
</tr>
<tr>
<td>Total Fellowships</td>
<td>$32,389,941.34</td>
</tr>
<tr>
<td>Number of separate fellowship transactions</td>
<td>7,364</td>
</tr>
<tr>
<td>Number of separate general ledger accounts from which fellowships were paid</td>
<td>564</td>
</tr>
<tr>
<td>Total Student Support 2011-12</td>
<td>$121,323,171.46</td>
</tr>
</tbody>
</table>
Academic Appointments

• We strongly encourage hiring units to provide each employed graduate student with an appointment letter.

• For examples:
  • A sample TA appointment letter: http://hr.ucdavis.edu/elr/elr_forms.html
Can you combine Academic Appointments and Fellowships?

- Administratively, it is very difficult to combine a fellowship and academic appointment in the same quarter. Here are the main options:
  - 25% FTE or above GSR and a small fellowship stipend
  - 25% FTE or above TA and a partial NRST fellowship ($4,898)
  - Fellowship stipend, fee & tuition fellowship, NRST fellowship and low % FTE GSR (<25%) to supplement the fellowship
  - If an non-US student comes with a foreign government sponsorship, Student Accounting will occasionally use those funds as first source of payment for fees & tuition and NRST, even if the student is employed. This is very rare.

- If programs want to cost share between fellowship funds and academic appointments, we encourage them to alternate quarters, e.g. fall GSR appointment that covers all costs and a winter fellowship that covers all costs.
## Nonresident Supplemental Tuition Remission (NRSTR) Diversion Process

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Circulate Award Notice to all parties (PI, Graduate Program Accounting Staff, etc)</td>
<td>Awarding Agency</td>
</tr>
<tr>
<td>2</td>
<td>Review terms and conditions of grant funding. Does the funding source prohibit nonresident tuition?</td>
<td>PI and Graduate Program Staff</td>
</tr>
<tr>
<td>3</td>
<td>Hire student as GSR. Is the student subject to NRSTR?</td>
<td>Graduate Program</td>
</tr>
<tr>
<td>4</td>
<td>Complete form to divert NRSTR and send to OGS</td>
<td>Graduate Program</td>
</tr>
<tr>
<td>5</td>
<td>Review and approve/deny NRSTR diversion form</td>
<td>Office of Graduate Studies</td>
</tr>
<tr>
<td>6</td>
<td>Process nonresident supplemental tuition remission (pays fees on students’ account in Banner &amp; posts remission expense to grant account)</td>
<td>Student Accounting</td>
</tr>
<tr>
<td>7</td>
<td>Payroll compute posts salary expense to grant account (monthly)</td>
<td>Payroll Department</td>
</tr>
<tr>
<td>8</td>
<td>Completes Journal Voucher worksheet and sends to A&amp;FS Systems Operations Department (monthly)</td>
<td>Office of Graduate Studies</td>
</tr>
<tr>
<td>9</td>
<td>Processes Journal Voucher worksheet (monthly)</td>
<td>Systems Operations</td>
</tr>
<tr>
<td>10</td>
<td>If changes are required, go back to step 4</td>
<td>Graduate Program</td>
</tr>
</tbody>
</table>
Types of Funding

How to fund your Graduate Education?

- Fellowships
- Academic Appointments
- Student Loans
- Personal Resources
Financial Aid

• **Loans**
  - 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/graduate/types/loans.html](http://financialaid.ucdavis.edu/graduate/types/loans.html)
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/Results/Index). 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.
Financial Aid

- **Graduate Financial Aid Office**

  - 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 p.m. for the first two weeks of the Fall 2014 quarter.

  - If you have questions for Graduate Financial Aid, we are committed to returning inquiries within a 24-48 hour time frame. You may contact us at (530) 752-9246 or [https://students.my.ucdavis.edu/ask_us/index.cfm](https://students.my.ucdavis.edu/ask_us/index.cfm).
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](http://www.fafsa.ed.gov)

- Priority filing deadline for grant eligibility is March 2\(^{nd}\). 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
Glossary

• 2014-2015 Graduate Student Expense Budget (Non-University Housing)

  • Fees - $16,541
  • Books & Supplies - $1,160
  • Basic Living - $14,875
    • Housing
    • Food
    • Personal
  • Transportation - $1,745
  • TOTAL = $34,321

• For citizens who are not CA residents add $15,102 for supplemental nonresident tuition = $49,423
Glossary

- **Financial Need - RPAAWRD**
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

- 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
Financial Aid

- **Fall Quarter 2014 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.

  - Monday, September 22\textsuperscript{nd}: Fall Quarter financial aid is released to student accounts to pay fees and other university charges.

  - Refunds are available on the first day of instruction, September 29, 2014. If not signed up for direct deposit, check pickup is available at the Student Accounting Window on the Second Floor of Dutton Hall.
Miscellaneous Information

- Information about undocumented students
- Taxes for students
- Student Financial support tools
- Where is my money?
- Important Dates
- Common banner forms
- Questions?
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)

- **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 and fee revenue.
    - Eligible for GPFA, DGSA, applicable Internal Fellowships as of 01/01/2013.

- **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
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.

• If you had income, you may be required to file two income tax returns: (1) Federal, and (2) California State
Tax

- **Forms:**
  - **1098-T**
    - "Tuition Payments Statement"
    - sent to Resident Aliens, for Tax Purposes, and U.S. Citizens
    - Copies from ACS, at 1-877-467-3821 or www.1098-t.com
  - **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

- **SISS for international students**
  - Comprehensive information on their website
Graduate Student Support Allocation Information/Tools

- **Allocation emails/letters**
  - Grad Program Fellowship Allocations from OGS in January (activated in GT$ in July)
  - DGSA from Dean’s Offices in February (activated in GT$ in July)
  - Work Study unit allocations in April

- **Summary worksheets emailed by OGS**
  - Final Balances from previous academic year and Beginning Balances for current academic year
  - Includes Grad Program Fellowship, DGSA, and carry-forward

- **Grad Track$ Web Reporting Tool** ([http://gradstudies.ucdavis.edu/faculty-staff/student-financial-support/online-applications-systems](http://gradstudies.ucdavis.edu/faculty-staff/student-financial-support/online-applications-systems))
  - Account summary and award detail available 24/7
  - Official system for establishing annual (current) student support budget
  - Official system to monitor and evaluate student support financial transactions

- **Nonresident Supplemental Tuition Diversion Forms**
  - Programs must manually deduct NRSTR diversions from allocation balances
  - Grad Studies deducts from GradTrack$ web report balances quarterly
Student Support Timeline

- **October 1** – deadline for fall and full year Work Study nominations to the Financial Aid Office (FAO)
- **October 15** – Fall Travel Award applications due to programs
- **November 15** – Fall Travel Award nominations due to OGS
- **December 1** – Continuing Student Internal Fellowship applications due in ApplyYourself
- **December 15** – Continuing Student Internal Fellowship nominations due to OGS via GARD
- **December 15** – Fall Travel Awards announced this week
- **January 15** – Deadline for winter Work Study nominations to FAO
- **January 15** – OGS will announce GPFA allocations for 2015-16
- **January 15** – Prospective Student Internal Fellowship applications due in ApplyYourself
- **February 5** – Prospective Student Internal Fellowship nominations due to OGS via GARD
- **February 15** – 2015-16 Dean’s Graduate Support Allocations communicated to you via your respective Dean’s Office
- **March** – First round of Continuing Student Internal Fellowships announced
- **March 2** – Priority filing date for FAFSA
- **March 7** – First round of Prospective Student Internal Fellowships announced
- **March 15** – Spring Travel Award applications due to programs
- **March 15** – Deadline for spring Work Study nominations to FAO
- **April 15** – Earliest acceptance deadline for entering student offers
- **April 15** – Spring Travel Award nominations due to OGS
- **April 15** – 2015-16 Work Study allocations communicated to programs
- **May 1** – Summer GSR Award nominations due to OGS
- **May 12** – Spring Travel Awards announced this week
- **June 1** – Summer GSR Awards announced this week
Important Dates

- **For Financial Aid:**
  [http://financialaid.ucdavis.edu/graduate/gradstudies/dates.html](http://financialaid.ucdavis.edu/graduate/gradstudies/dates.html)
- **Drop for Non-Payment, Graduate Students:**
  [http://registrar.ucdavis.edu/tuition/non-payment.cfm](http://registrar.ucdavis.edu/tuition/non-payment.cfm)
- **Quarter Dates and Deadlines:** [http://registrar.ucdavis.edu/calendar/quarter.cfm](http://registrar.ucdavis.edu/calendar/quarter.cfm)

- **Sept 22\textsuperscript{nd}:** Fall Financial Aid (loans) posts to student accounts
- **Sept 29\textsuperscript{th}:** Fall loan remainders disburse to students
- **Oct 2\textsuperscript{nd}:** Fall quarter instruction begins
- **Nov 1\textsuperscript{st}:** First fall quarter fellowship stipend payment date and the first academic appointment salary payment date
- **Nov 20\textsuperscript{th}:** Grad student fall fee payment deadline ($110 late fee & winter hold)
- **Dec 1\textsuperscript{st}:** The second fall quarter fellowship stipend payment date and the second academic appointment salary payment date
- **Dec 1\textsuperscript{st}:** UC Davis Continuing Graduate Student Internal Fellowship application due
- **Dec 12\textsuperscript{th}:** Fall quarter instruction ends
- **Dec 15\textsuperscript{th}:** Published winter quarter fee payment deadline
- **Jan 1\textsuperscript{st}:** The third (and final) fall quarter fellowship stipend payment date and the third academic appointment salary payment date
- **Jan 2\textsuperscript{nd}:** Winter Quarter Financial Aid Refunds available through Direct Deposit or Student Accounting for eligible students
Review Types of Funding

• **Fellowships**
  - **US Citizens:** Stipend, Tuition & Fee, and NRST fellowships are paid to your student account (banner), viewable in MyBill and SISWEB. No withholding tax deducted from stipend payments.
  - **Non-US Citizens:** Tuition & Fee and NRST fellowships post to banner and viewable via MyBill and SISWEB. Fellowship stipends paid via the payroll system (not viewable via MyBill or SISWEB); withholding tax may be deducted from stipends.

• **Academic Appointments**
  - Student paychecks (salary) is paid via payroll system (does not lower your loan eligibility in banner).
  - Remission is paid to your student account in banner (remission lowers your loan eligibility) and is viewable via MyBill and SISWEB.

• **Student Loans**
  - Paid to your student account (banner); viewable in MyBill, MyAwards, and SISWEB

• **Personal Resources**
  - Your cash payments post to your student account in banner (visible via MyBill and SISWEB)
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](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 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**
  - http://gradstudies.ucdavis.edu/programs/

• **Contact listed on your funding letter**
  - GSR, TA, Fellowship, External Agency, etc.

• **The PI who hired you**
  - Can refer you to their appropriate accounting staff

• **External Fellowships**
  - CA&ES: Deborah McCook – dlmccook@ucdavis.edu
  - Not CA&ES: Kristin Provost – klprovost@ucdavis.edu

• **Loans**
  - Grad Financial Aid – (530) 752-9246 or
    https://students.my.ucdavis.edu/ask_us/index.cfm

• **Complex, multi-department, issue?**
  - **Financial Support Specialist** - Lisa Finnegan - llfinnegan@ucdavis.edu
    or 530 752.8864
Common Banner Objects

<table>
<thead>
<tr>
<th>Banner Object</th>
<th>Functional Tasks</th>
</tr>
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<tbody>
<tr>
<td>SOAIDEN</td>
<td>Person Search</td>
</tr>
<tr>
<td>ZPAPERQ</td>
<td>Student Information</td>
</tr>
<tr>
<td>TSAAREV</td>
<td>Student Account Transaction Detail</td>
</tr>
<tr>
<td>YPAGWRD</td>
<td>Award Entry Form</td>
</tr>
<tr>
<td>RPAAWRD</td>
<td>Check FAFSA</td>
</tr>
<tr>
<td>ROAENRL</td>
<td>Enrollment Units</td>
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<tr>
<td>ZHASTDX</td>
<td>Major, PELP, Degree Status (see time limit tab)</td>
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<td>Degree and Degree Status (Adv to Candidacy Date)</td>
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<tr>
<td>SHAQPNO</td>
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</tr>
</tbody>
</table>

https://sis.ucdavis.edu/secure/search/
Questions?

Thank You!
Graduate Student Support Expectations

The Ideal World

Airline industry example

- **Student** = passengers (customers)
- **OGS/Faculty/Dept Staff** = pilots and flight attendants
- **Airplane** = student support/fellowship/application = $$
Graduate Student Support Expectations

The Real World

- **Airline industry example**
  - **Airplane** = student support/fellowship/application = $$
  - **Funding Source** = airplane manufacturer
  - **Graduate Program** = airline
  - **Graduate Program Faculty & Staff** = flight instructors
  - **Student** = pilot and mechanic!
  - **Office of Graduate Studies** = combination of the Federal Aviation Administration (FAA) & the National Transportation Safety Board (NTSB)
Graduate Student Support Expectations

The Real World

- The Student is responsible for flight preparation, navigation, piloting, maintaining, and fixing their airplane (funding). UC Davis does not have enough staff to act as pilots, mechanics, or flight attendants.

- OGS (FAA/NTSB) is responsible for the oversight of hundreds of graduate programs (airlines), hundreds of fellowships applications (airplanes), and thousands of students (pilots).

- If you are applying for funding (airplane) or your airplane is broken, you must read all the owner’s manuals (UC Davis Grad Student Guide, external fellowship instructions/restrictions, etc.) and contact the manufacturer of the airplane (the funding source: external agency, FAO, your hiring department, your Graduate Program, etc.) with questions.
  - The FAA sets the rules for issuing pilots’ licenses, but flight instructors do not work for the FAA.
  - You would not contact a flight instructor or the FAA to fix your airplane. Airplane mechanics do not work for the FAA.
  - Flight instructors and the staff at the NTSB could not be expected to know how to fix all of the mechanical problems for thousands of different kinds of airplanes.