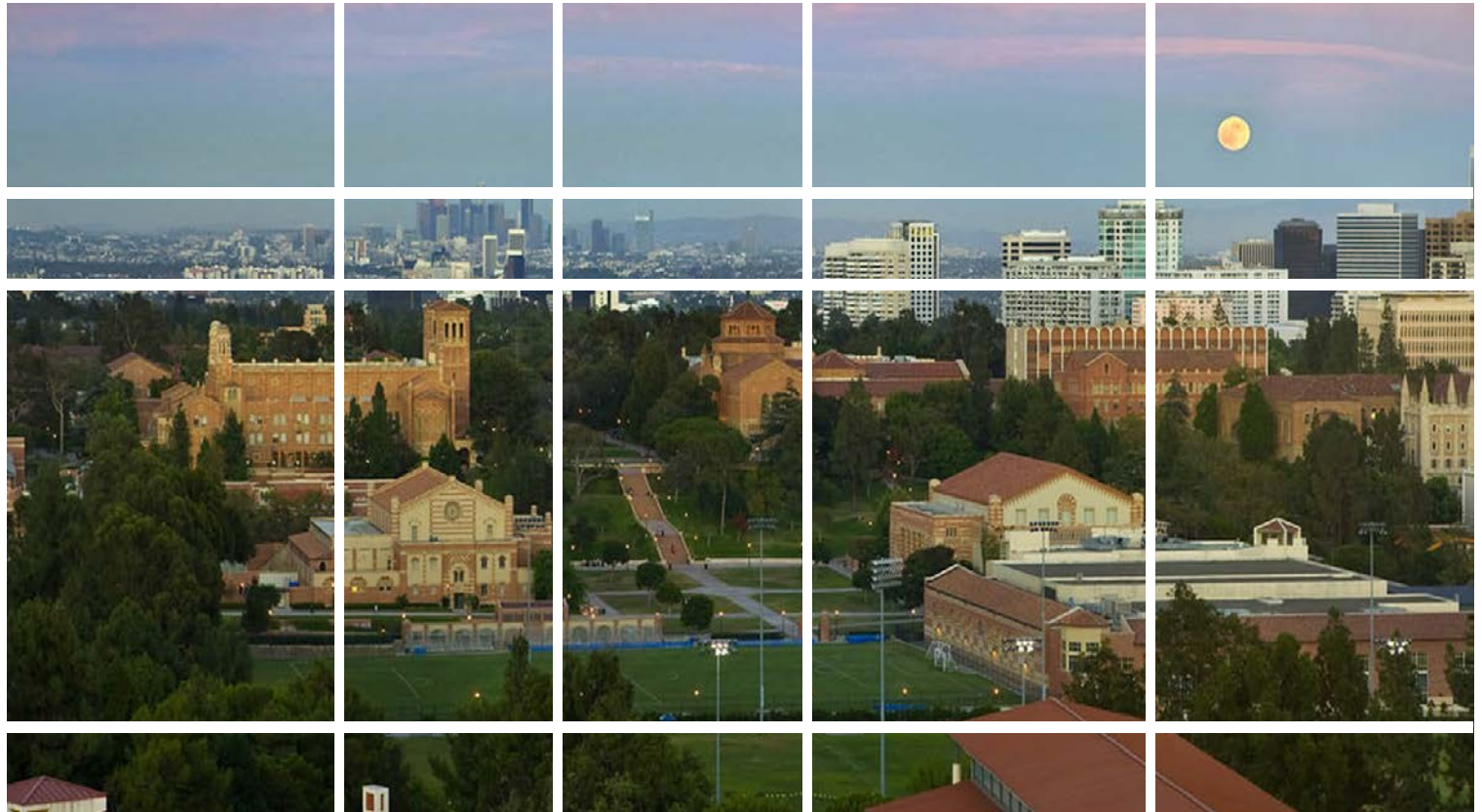


**GRADUATE
DIVISION**

**FELLOWSHIPS AND
FINANCIAL
SERVICES
1228 Murphy Hall
MC:144401**

AGCA Town Hall Spring 2015



Form more
information,
please visit:
Go.grad.ucla.edu

(310) 825-1025
Fellowships: uclafellowships@grad.ucla.edu
Financial Services: gdsupport@grad.ucla.edu

Spring 2015 **UCLA**

Agenda

About us/Staying in Touch

Cost Sharing for Individual Extramural Graduate Fellowships

Other Topics:

- BAR Reports using COGNOS

- Childcare Reimbursement

- Childbirth Accommodation

- GD Special Fellowship Yield Tips

- UAW Contract – Did You Know?

- How Do You Pay?

- Best Practices

Announcements/Reminders

AGCA Questions

Meet and Greet

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Fellowships Staff

Fellowship Services	Oversight
Cherie Francis	GDSA, GOFP, Extramural Funding, Privately Endowed,
Estevan Hernandez	Cota Robles, DYF, Fulbright Hays DDRA, Jacob Javits, NSF
Mikelle Nickens	Cota Robles 2, GRM, Fulbright US Programs, Research allowance – DYF, GRM, GSRM; Special Fellowship Exceptions

Financial Services Staff

Financial Services	Oversight
Audrey Cheng	Life and Physical Sciences, Individual Extramural Matching; AAP Audit
Henry Hernandez	Humanities and Social Sciences, GSRM
Fred Merrick	Professional Schools; Intercampus Appointments
Arlene Ortiz	Financial Analysis, Audit, Recruitment Visit, Exceptions
Jenny Tang	Engineering, Conference Travel/Research, Post Doc/VGR/VS fellowship payments

Staying In Touch

- Gradfellowships – Announcements including extramural funding opportunities, travel abroad and dissertation research, Graduate Division fellowships information and deadlines. To register, please contact Chérie Francis cfrancis@grad.ucla.edu .
- Gradsupport - Provides updates and information regarding financial, human resource, and items important to the general campus. Visit: <https://grad.ucla.edu/asis/infoserv/gsslist.htm> to sign up. Limited to administrators.

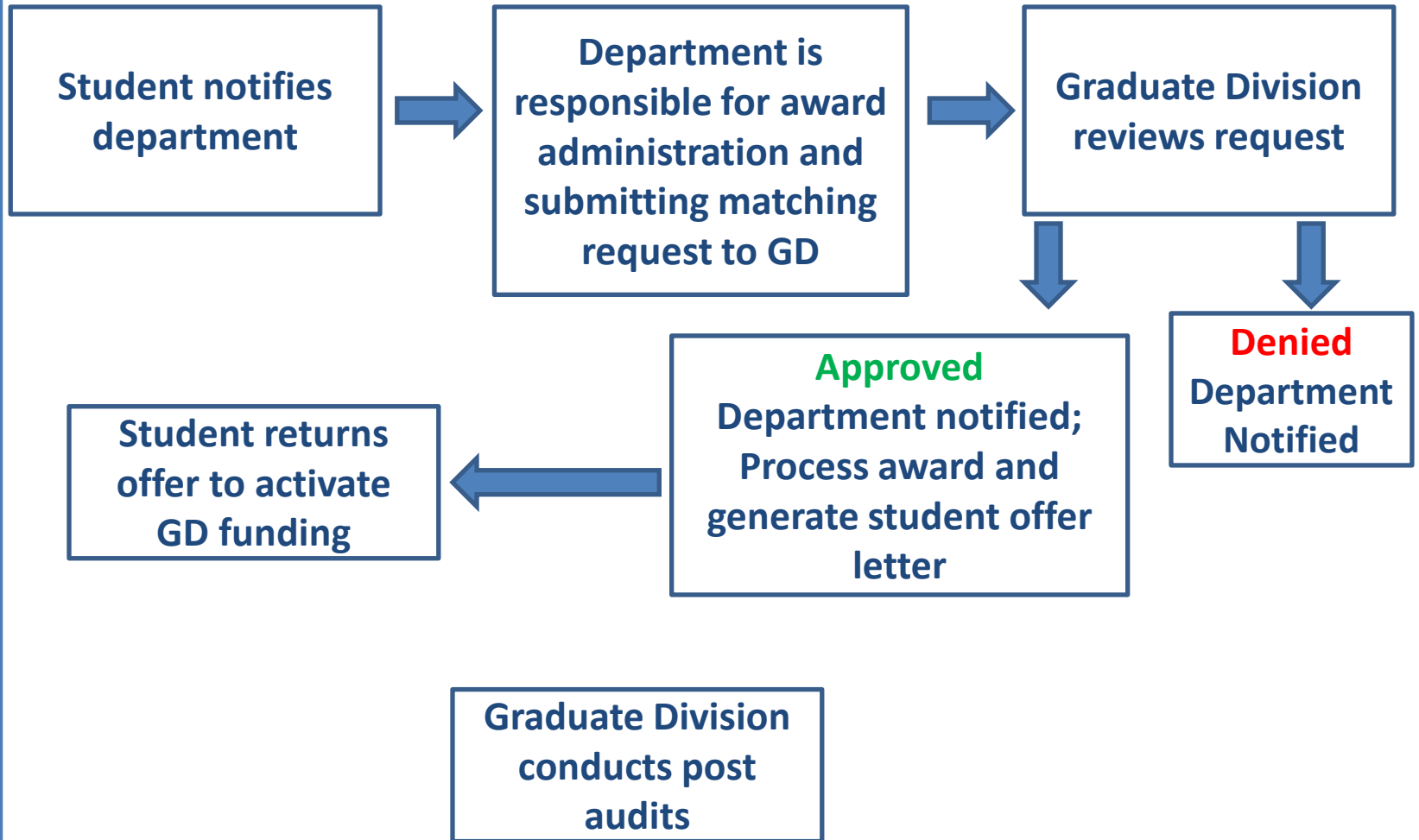
Cost Sharing for Individual Extramural Graduate Fellowships

- Effective 2014-2015
- 50-50 cost share GD/Department on tuition/NRST not covered by external funding source

Cost Share Policies

- Only awards given directly to student qualify
- Awards paid as wages not eligible
- Maximum 25% time employment
- If student is remission eligible, it will supersede GD funding with department covering fee balance
- Self-Supporting, Dentistry, Law and Medical students don't qualify

Process



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Required Documents

- Matching Request Form
- Award Summary
- Notice of Award

BAR Reports using COGNOS

From the menu select BAR



BAR Reporting

Student Account Activity

- [▶ Zero Balance](#) ←
- [▶ Fee Deferral](#) ←
- [▶ NRT Assessed Report](#) ←
- [▶ GSHIP Waiver Report](#) ←
- [▶ Balance Due Report](#) ←
- [▶ Fee Balance Due Only Report](#) ←

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LINKS

Step 1: Select Report Criteria

Major Code	* 0780 - PSYCHOLOGY
Academic Term	* 15S
Career Code	* G
<input type="button" value="Cancel"/> <input type="button" value="Get Report"/>	

Childcare Reimbursement

- Registered/enrolled with 25% ASE/GSR appointment
- \$900 per quarter/\$1,350 per semester
- Qualified dependent(s): children in custody of the ASE/GSR/fellowship recipient aged 12 or under on **July 1st**
- Expenses incurred before/after a term not eligible

Childcare Reimbursement Process



Completes the form, certifies that the appropriate program requirements are met and submits the form and applicable receipt(s) to the hiring unit

Federal tax withholding rate will be 25% (reference Federal Regulations 31.3403(g)-1 and the State tax withholding rate at 6%



Certifies that the form is complete, the employee has/had a qualified ASE/GSR appointment, and that the applicable documentation is attached to the request

Process a one-time payment using the online PPS Department Time Reporting screen "EDFT" with DOS code "BXC

Childbirth Accommodation Funding

Provides expectant mothers who work as GSRs or hold extramural fellowships that **DO NOT** fund maternity leave with paid leave for up to six weeks

(ASEs are covered under the Article 17 D. Leaves)

Eligibility:

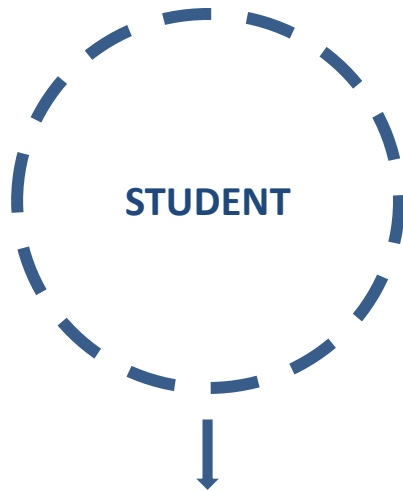
Enrolled in Master or Academic
Doctoral Program only

Employed 25% or more in GSR
title or hold extramural
fellowship

Prove current funding does not
cover maternity leave

Spouses, partners and adoptive
parents are not eligible

Process



Completes the top section of the form and submits to department.



Completes department section and submits to Graduate Division. Department calculates amount to be paid.



Reviews form and notifies department to make adjustments to appointment period. Prorates tuition or remission amounts as needed.

Process payment as fellowship via the FAM system.

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LINKS

<https://grad.ucla.edu/gss/childbirth/childbirthpetition.pdf>

Special Fellowship Yield Tips

- Quality over quantity
- Strong letter of recommendations
- Are they ready?
- Adhere eligibility/criteria requirements
- Building a culture/infrastructure

Announcements

- House Calls
- Exception fatigue
- GRAPES for the 21st Century
- Verify student degree classification
- Feedback

Reminders - Allocation

- Block Grant Allocation deadline: July 1, 2015, ***soft deadline****
- If fee/tuition rates are unknown, use ***prevailing*** amounts
- Full quarterly amounts only when allocating NRST
- What you submit is what you get

Reminders – GD Fellowships

- Employment limits while holding GD Fellowships*
- During the departmental funding year, all funds provided must *originate* from the original pledging department
- Do not wait until the last minute to cover assigned fee balances as it relates to extramural grants i.e. NSF etc.
- For research allowance submissions (DYF, GRM, GSRM) include:

General Conditions for
Student Travel Form

Reimbursement Form

Receipts

<https://jasmine.gdnet.ucla.edu/gss/library/deptmnlgrdfnd1516.pdf> - *Pages 9-10

<https://grad.ucla.edu/asis/stusup/travelcndtns.pdf>

<https://grad.ucla.edu/asis/stusup/travelform.pdf>

LINKS

Reminders – GD Fellowship Application Process

- Students should review the entire fellowship application before submission
- Recommendations letters on letterhead and signed
- Unofficial transcripts legible and from MyUCLA
- Document uploads should be in order and correct orientation
- Excess application pages will be removed

Reminders - Employment

- Utilize AAP hiring checklist
- Departmental certification – Statement of Understanding
- Special Readers *cannot* perform TA duties; Teaching Fellows can *only* provide instruction for lower division undergraduate courses*
- 375 enrollment for TA appointees
- Students seeking TA appointments beyond 12 quarters must have advanced*

Reminders - Exceptions

Exceptions are a privilege

- Reference “Online Exceptions Information Needed for Review”
- Supply supplemental materials
- Submit exceptions prior to a quarter
- GD no longer oversees over 50% employment requests

UAW Contract – Did You Know?

Article	Title	Highlight
2	Appointment Notification	Year-Long appointments are preferable
3	Appointment Security	Once contract signed, student must be made whole
20	Non-Discrimination in Employment	Non-Gender Restrooms
22	Posting	Projected ASE openings must be provided by March 15 for the upcoming year

UAW Contract – Did You Know?

Article	Title	Highlight
23	Training & Orientation	Part of workload when course taken for credit; training to meet eligibility; TOP exam or other language test
29	Wages	2015-2016 - 4% increase effective October 1, 2015
31	Workload	50% time per week or 220 hours per quarter

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*Current contract effective
June 20, 2014 – June 30, 2018*

<http://ucnet.universityofcalifornia.edu/labor/bargaining-unhttp://ucnet.universityofcalifornia.edu/labor/bargaining-units/bx/contract.htmlits/px/index.html>

LINKS

How Do You Pay?

Option 1: 12 months

Fall-Summer (October-September)

Option 2: 12 months

Summer-Spring (July-June)

Option 3: 9 months

Fall-Spring (October-June)

OPTION 1 (October-September)

DEPARTMENTAL STIPEND FUNDING CYCLES

	YR1		YR2		YR 3		YR4	
	2015-16 academic year	2016-17 summer	2016-17 academic year	2017-18 summer	2017-18 academic year	2018-19 summer	2018-19 academic year	2019-20 summer
July		\$ 2,083.33		\$ 2,083.33		\$ 2,083.33		\$ 2,083.33
August		\$ 2,083.33		\$ 2,083.33		\$ 2,083.33		\$ 2,083.33
September		\$ 2,083.33		\$ 2,083.33		\$ 2,083.33		\$ 2,083.33
October	\$ 2,083.33		\$ 2,083.33		\$ 2,083.33		\$ 2,083.33	
November	\$ 2,083.33		\$ 2,083.33		\$ 2,083.33		\$ 2,083.33	
December	\$ 2,083.33		\$ 2,083.33		\$ 2,083.33		\$ 2,083.33	
January	\$ 2,083.33		\$ 2,083.33		\$ 2,083.33		\$ 2,083.33	
February	\$ 2,083.33		\$ 2,083.33		\$ 2,083.33		\$ 2,083.33	
March	\$ 2,083.33		\$ 2,083.33		\$ 2,083.33		\$ 2,083.33	
April	\$ 2,083.33		\$ 2,083.33		\$ 2,083.33		\$ 2,083.33	
May	\$ 2,083.33		\$ 2,083.33		\$ 2,083.33		\$ 2,083.33	
June	\$ 2,083.37		\$ 2,083.37		\$ 2,083.37		\$ 2,083.37	
TOTAL	\$ 18,750.01	\$ 6,249.99	\$ 18,750.01	\$ 6,249.99	\$ 18,750.01	\$ 6,249.99	\$ 18,750.01	\$ 6,249.99

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OPTION 2 (July-June)

DEPARTMENTAL STIPEND FUNDING CYCLES

	YR1	YR2	YR 3	YR4
	2015-16	2016-17	2017-18	2018-19
July	\$ 2,083.33	\$ 2,083.33	\$ 2,083.33	\$ 2,083.33
August	\$ 2,083.33	\$ 2,083.33	\$ 2,083.33	\$ 2,083.33
September	\$ 2,083.33	\$ 2,083.33	\$ 2,083.33	\$ 2,083.33
October	\$ 2,083.33	\$ 2,083.33	\$ 2,083.33	\$ 2,083.33
November	\$ 2,083.33	\$ 2,083.33	\$ 2,083.33	\$ 2,083.33
December	\$ 2,083.33	\$ 2,083.33	\$ 2,083.33	\$ 2,083.33
January	\$ 2,083.33	\$ 2,083.33	\$ 2,083.33	\$ 2,083.33
February	\$ 2,083.33	\$ 2,083.33	\$ 2,083.33	\$ 2,083.33
March	\$ 2,083.33	\$ 2,083.33	\$ 2,083.33	\$ 2,083.33
April	\$ 2,083.33	\$ 2,083.33	\$ 2,083.33	\$ 2,083.33
May	\$ 2,083.33	\$ 2,083.33	\$ 2,083.33	\$ 2,083.33
June	\$ 2,083.37	\$ 2,083.37	\$ 2,083.37	\$ 2,083.37
TOTAL	\$ 25,000.00	\$ 25,000.00	\$ 25,000.00	\$ 25,000.00

DIVISION

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OPTION 3 (October-June)

DEPARTMENTAL STIPEND FUNDING CYCLES

	YR1	YR2	YR 3	YR4
	2015-16	2016-17	2017-18	2018-19
October	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00
November	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00
December	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00
January	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00
February	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00
March	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00
April	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00
May	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00
June	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00
TOTAL	\$ 18,000.00	\$ 18,000.00	\$ 18,000.00	\$ 18,000.00

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Best Practices

Recommendations	Examples
Vertical and horizontal communication	<i>Consistent</i> communication to supervisors, faculty, students (vertical) as well as colleagues (horizontal)
Utilize central campus reports	RDS, BAR, Payroll, FS, etc.
Be proactive	Identify students who need exceptions
Timely submissions	Allocation nominations
Holistic student tracking	Integrated/open source interface
Creating an imperative for fellowship sourcing	Provide incentives
Know your departmental funding	What is allowable? Communicate with departmental fund manager/Office of Contracts and Grants Administration (OCGA)

AGCA Questions

If a student has been hired to be a Special Reader and received an exception (i.e. not having taken the course previously), why do we need to do an exception every quarter if the student is a Special Reader in the same course in the future?

An exception is required again given the student didn't meet eligibility and all Special Reader appointments regardless of a duplicative nature mandate prior GD approval per AAP policy.

AGCA Questions

How can we help debunk the myth that graduate students must pay for their education solely through loans?

There are numerous avenues including fellowships, employer contributions, institutional tuition offsets and loan forgiveness programs which can replace and/or reduce the amount of loans. A great starting place is GRAPES. Students must understand that searching for financial support is critical and a mandatory skill to develop. They need to develop an “EOP” mindset:

- **E**arly
- **O**ften
- **P**ersistent

HOW TO FUND YOUR EDUCATION

...without Loans

brought to you by :
UCLA Graduate Division -
Fellowships & Financial Services



Don't wait! **Apply early.**
Apply one year before
funding is needed.



Search for what you are
eligible for.



Get to **work.**
Write proposals and
complete applications.



Scholarships, Fellowship & Grants

These can be one year
or multi-year. They
provide stipends
and/or pay fees/tuition.



Teaching & Research Assistanships

Provide paid teaching
and research
experience through
campus departments.



Extramural Fellowships

Awarded for use at any
accredited U.S institution.
These go where you go.



Continue to apply. As you
progress through your
graduate studies, you may
become eligible for more
funding.



**Fellowships & Financial
Services** is here to
help; schedule an
appointment today.



Enjoy your funding!
It can be loan free or
covered by loan
forgiveness/repayment
programs.

AGCA Questions

Our chair would like to know the number of GSRM and GRM applications submitted per department and the number of awards made per department. How may I advise him to obtain these numbers?

We can provide numbers at the applicable department and/or general campus level. The number of awards given is influenced by a number of factors including:

- **Application numbers**
- **Pool strength**
- **Funding availability**

Aggregated GRM & GSRM Data

GRM

Year	Nominations	Offered
2015-2016	224	108
2014-2015	216	108
2013-2014	217	103
Average 3 Year Offer %		49%

GSRM

Year	Applications	Offered
2015-2016	449	328
2014-2015	415	325
2013-2014	415	330
Average 3 Year Offer %		77%

AGCA Questions

How do you see the role of the departmental graduate advisor changing – past, present, and future – in relation to Graduate Division Fellowships & Financial Services Division?

Over the years, the role of departmental graduate advisors in relation to FFS has evolved to an ever greater state of interaction/cooperation given the landscape of increasing costs, complexity/variability in crafting fellowship packages, GD funding initiatives and the digital age. Moving forward, the graduate advisor will be pressed to address these matters on a larger scale. For FFS, the challenge is to help graduate advisors navigate safely through these waters.

AGCA Questions

What do you see as ways the departmental advisors/departments can better serve in their roles?

*Departmental advisors/departments should see themselves as information aggregators and distributors. You have a critical role in this area as you are the hub and primary information source for students, administrators and faculty. In particular, communicate clearly and often with your students. Utilize the tools and resources offered by FFS. Pay close attention to listserv announcements, **review/read** our publications, connect with FFS staff. Lastly, be an active advocate for students and emphasize **accountability** to them.*

AGCA Questions

Will fees increase in 15-16 AY? If so, can departments receive charts sometime in June before July 1st deadline GD allocation so that we may adjust allocations?
When will fee charts be available on-line?

*Unknown at this point as it is under negotiation and contingent on final UC Regental approval. A decision is not likely until summer. Once final figures are known, we will publish fee charts. Please remember that the official rates are first made available on the Registrar's website: <http://www.registrar.ucla.edu/fees/>.
We publish fee charts as a service to the campus.*

What are the new fee amounts for new Ph.D. students and for current students?

Same as above

What are the new fee balances each quarter?

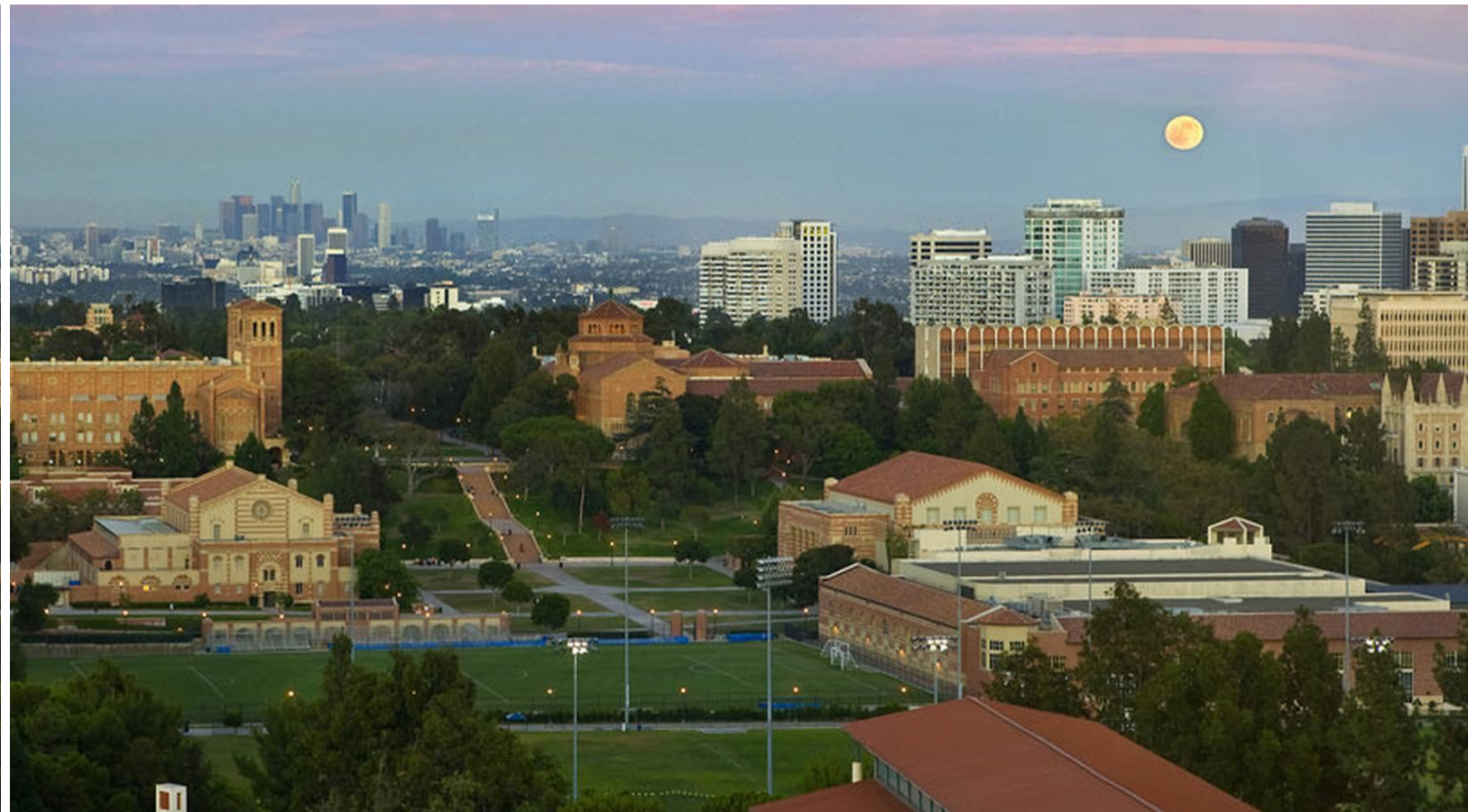
Same as above

AGCA Questions

Will TA salary increase? If so, when will the new chart table be available on-line?

Per UAW contract article 29, TAs will have a 4% increase effective October 1, 2015. The new compensation charts will be available once OP issues final directives sometime in summer.

MEET AND GREET



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Thank you for attending!