Tuition-Related Procedures for Graduate Student Appointments: Graduate Assistantships, Fellowships, Traineeships

Prepared by
Office of Fellowships and Funding Resources
UW-Madison Graduate School

and by
the Bursar’s Office
UW-Madison

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# Tuition-Related Procedures for Graduate Student Appointments: Graduate Assistantships, Fellowships, and Traineeships

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Key Contact and Important Links

Key Contacts:

Chris Cleary-Hinz: Bursar’s office, tuition remissions (remissions@bussvc.wisc.edu, 2-4518)
Cathy Stamm: Bursar’s office, third-party deferrals (thirdparty@bussvc.wisc.edu, 2-3612)
Your School’s/College’s Human Resources Office
Linda Scholl: Graduate School fellowship administration (linda.scholl@wisc.edu, 5-5522)
Nick Novak: Graduate School, NIH/NRSA fellows/trainees administration, shortfalls
(nick.novak@wisc.edu, 5-4868)

Links:

- Student Assistant Appointments Titles and Descriptions, including links to stipend levels for TAs, PAs, RAs, and LSA (Lecturer-Student Assistants)
- Tuition remission forms for Graduate Assistants (RAs, PAs, TAs, LSAs, and Fellows
- Third-party deferral forms and instructions
- Bursar’s Secure Website for uploading forms
- External fellowships supported by the Graduate School
- Tuition remission policy for external fellowships not supported by the Graduate School
- Fellowship Information Form to request non-resident tuition remission for external fellowship not already supported by the Graduate School
- AOF/GRS Communities and contacts
- Shortfall form for NIH/NRSA Fellows and Trainees to be used at the end of the fellowship or the close of the grant to request coverage of the shortfall by the Graduate School
Overview

Graduate Student Appointments and Tuition

Graduate student support comes in different forms, among them graduate assistantships (RAs, TAs, PAs, or LSAs – Lecturer Student Assistants), fellowships, and traineeships. However, there are significant differences in how tuition-related processes are handled for these different appointment types.

At UW-Madison, there are three parts to graduate tuition and fees (Figure 1): 1) resident tuition that is charged to all enrolled graduate students, 2) non-resident tuition that is an additional charge to enrolled students who are not WI residents, and 3) segregated fees. Although the term “tuition remission” is used for graduate assistants and fellows alike, tuition remission for graduate assistants (those with appointments of 33% or higher) indicates remission of the resident and non-resident portions of tuition. Graduate assistants are responsible for paying the segregated fees themselves. Tuition remission for fellows is quite different. Fellows receive remission only of the non-resident portion of tuition. The resident tuition and segregated fees are not remissed (waived) for fellows, but paid by the funding source.

FIGURE 1
Graduate Assistants: RAs, TAs, PAs, LSAs

Background

The University remits the non-resident and resident tuition for Teaching Assistants, Program/Project Assistants, Lecturer Student Assistants (LSA), and Research Assistants who hold the equivalent of at least 33% appointment for the length of the fall or spring term. Students who have spring graduate assistantship positions of at least 33% will automatically have that remission carried over to the summer term. Students are responsible for paying their segregated fees each term they are enrolled. For more information on this policy, visit the bursar’s website: http://www.bussvc.wisc.edu/bursar/remista.html.

The university assesses the employing units a $5,000 tuition remission surcharge per eligible PA and RA appointment per term (fall & spring only). TA and LSA appointments are exempt from this surcharge.

Responsibilities of Staff in Employing Unit

1. For each fall and spring semester, submit a RA, RA, PA, LSA, and Instructional Staff Remission Form tuition remission authorization list (http://www.bussvc.wisc.edu/bursar/remismnu.html) for all >33% graduate assistants your unit employs. Failure to submit this form will mean that the student is incorrectly billed for tuition.

2. For summer term, complete the above procedure only if a student did not have an eligible spring appointment as a graduate assistant.

3. Set up payroll.

4. Process benefits packet including direct deposit authorization.

Questions?

Chris Cleary-Hinz, ccleary@bussvc.wisc.edu, 2-4518
University Fellows, Chancellor’s Fellows, Dickie Fellows, and Mellon-Wisconsin Summer Fellowships

Background

University Fellowships, Chancellors Fellowships, Mellon-Wisconsin Fellowships, and Dickie Fellowships are awarded in a competitive process and administered through the Graduate School. All University, Chancellors, Dickie, and Mellon-Wisconsin Summer Fellows receive a stipend and paid tuition and fees during the fellowship tenure. In addition, University, Chancellor’s and Dickie Fellows are eligible for health insurance during the fellowship period.

Responsibilities of Program Staff

1. Process benefits packet including direct deposit authorization.

Responsibilities of Graduate School

1. Remits non-resident portion of Fellows’ tuition and fees.
2. Processes the third-party deferral of Fellows’ resident tuition and fees.
3. Sets up payroll appointments.

Questions?

Linda Scholl, linda.scholl@wisc.edu, 5-5522
Advanced Opportunity Fellows (AOFs)  
a.k.a. Graduate Research Scholars (GRS)

Background
The University allocates Advanced Opportunity Program funds to Graduate Research Scholar (GRS) communities in Schools and Colleges to support the recruitment and retention of highly qualified underrepresented students in UW-Madison graduate programs. Each GRS program administers the funds and organizes community-building activities for Fellows. Departments and Programs should communicate with the appropriate GRS coordinator regarding AOF/GRS fellowships.

Responsibilities of Program Staff

1. Responsibilities vary: Stay in close contact with the GRS Coordinator in your School/College. Check with the Coordinator about your payroll responsibilities.

2. Process benefits packet including direct deposit authorization.

Responsibilities of Graduate School

1. Lead a campus-wide GRS committee to share exemplary practices among GRS programs.

2. Serve as a resource for programs on the AOF eligibility criteria.

Questions?


GERS (Engineering): Kelly Burton

EdGRS (Education): Aaron Bird Bear

L&S C-GRS (Letters & Science, SoHE): Brian Bubenzer

Business GRS: Maria Reis

EnviroGRS (Nelson Institute): Jim Miller

Nursing GRS: Carol Aspinwall
Graduate School-Supported External Fellows

Background

The Graduate School at UW-Madison administers numerous prestigious fellowships funded by external agencies and covers any shortfall between the funds provided by the agency and the full cost of the student's fellowship on campus. Fellows are provided the agency's stipend, full tuition support during the fellowship period, as well eligibility for the university’s health insurance plans. The Graduate School-supported external fellowships include:

- ACLS Dissertation Completion Fellowship
- Ford Foundation Fellowship Programs
- Jacob K. Javits Fellowship Program
- NIH/NRSA Fellowships and Traineeships
- National Physical Science Consortium Fellowship
- National Science Foundation Graduate Research Fellowship Program
- Hertz Foundation Fellowship
- Charlotte W. Newcombe Fellowship
- Spencer Dissertation Fellowship
- Social Science Research Council (SSRC) Fellowships
  - Eurasia Program Fellowships
  - International Dissertation Research Fellowship
- Mellon – Council for European Studies Dissertation Completion Fellowship
- CIC/Smithsonian Institution Fellowship Program (only those winners affiliated with the CIC competition)

Fellows receive full tuition and fee support during the fellowship, as well as eligibility for health insurance.

Responsibilities of Program Staff

1. Process benefits packet including direct deposit authorization.

Responsibilities of Graduate School

1. Remits the non-resident portion of Fellow’s tuition and pays his/her resident tuition and fees.
2. Sets up payroll appointments.

Questions?

Irina Diaz, irina.diaz@wisc.edu, 890-0738
Wisconsin Distinguished Graduate Fellows (WDGF)

Background

WDGF fellowships are supported by gift funds set up through UW Foundation, using stipend rates determined by the Graduate School. Some departments have several WDGF accounts; others have none. Graduate programs monitor their own WDGF accounts and make fellowship awards as funds are available. The graduate program and the Graduate School share costs for tuition, stipend, fringes, segregated fees, and the $1,500 flexible funds for the fellow. Costs are split evenly between the UW Foundation account (233) and Graduate School (135) account. For more information on the administration of these fellowships, visit the Graduate School’s WDGF website: http://grad.wisc.edu/resfunding/main/admindistinguished/

Responsibilities of Program Staff

1. Each fall and spring semester, submit a tuition remission authorization list (http://www.bussvc.wisc.edu/bursar/remismnu.html) (fellow) for non-resident portion of tuition directly to the bursar’s secure website. If you have a student starting a WDGF fellowship in the summer term, submit a summer tuition remission authorization form for that student to the bursar’s office.

2. Each fall, spring, and summer term, submit a third-party deferral form (http://www.bussvc.wisc.edu/bursar/dept3rd.html) for the resident tuition/fees to bursar.

3. When the bursar sends an invoice, pay one half of each semester's in-state tuition and seg fees on the “135” account and the other half on the “233” account. For instructions on submitting third-party payments, visit the bursar’s website: http://www.bussvc.wisc.edu/bursar/interinfo.html.

4. Set up payroll, split evenly between Funds 135 and 233.

5. Process benefits packet including direct deposit authorization.

6. As approved by the students’ advisor, process $1,500 in flexible fund research purchases or travel in one or more direct payments to the fellow, split between Funds 135 and 233.

Questions?

School/College contacts: http://grad.wisc.edu/resfunding/widistinguishedcontact

Linda Scholl, linda.scholl@wisc.edu, 5-5522
FLAS Fellows

Background

FLAS fellowships are funded by the U.S. Department of Education and administered by the UW's National Resource Centers through the Division of International Studies to assist students in acquiring foreign language and either area or international studies competencies. Benefits of the graduate FLAS fellowships include: stipend, remission of the non-resident portion of tuition, payment of the resident portion of tuition and fees, and eligibility for health insurance.

Administrative Details

Eight FLAS Coordinators oversee the fellowship selection process and handle the reporting requirements to the Department of Education.

The Division of International Studies payrolls the fellows.

Four financial specialists handle the tuition remission and third-party deferral processes for the fellows.

Questions?

Payroll-related questions: Kristine Schutte, Division of International Studies, 262-5804, kschutte@bascom.wisc.edu

All other questions: Division of International Studies, flas@global.wisc.edu
External Fellows Qualifying for Non-resident Tuition Remission

Background
The campus has authorized the Graduate School to remit the non-resident portion of a fellow’s or trainee’s tuition (NIH NRSA fellows and NIH NRSA trainees excluded) under the following conditions: 1) The student is payrolled through the University, i.e., not paid directly by an agency or foundation; and 2) the stipend paid to the fellow/trainee is at or above the stipend of a 333% Research Assistant. For 2015-2016, those rates are as follows: Annual appointment basis: $14,432; Academic appointment basis: $11,808; Semester appointment basis: $5,904. If both the above criteria are met, the Graduate School can remit the non-resident portion of the student’s tuition upon request by the program/department.

Responsibilities of Program Staff
1. Each fall and spring semester, submit a Fellowship Information Form (https://kb.wisc.edu/images/group156/shared/OffR/FellowshipInformationForm.xls) to the Graduate School (offr@grad.wisc.edu). This form allows the Graduate School to verify that the fellow qualifies for remission of the non-resident portion of tuition.
2. If the funding agency or department will cover the resident portion of tuition and/or fees, submit a third-party deferral form (http://www.bussvc.wisc.edu/bursar/dept3rd.html) for that amount directly to the bursar.
3. When the bursar sends an invoice, pay resident portion of tuition and/or seg fees. For instructions on submitting third-party payments, visit the bursar’s website: http://www.bussvc.wisc.edu/bursar/interinfo.html.
4. Set up payroll.
5. Process benefits packet including direct deposit authorization.

Responsibilities of Graduate School
1. On receipt of Fellowship Information Form from program, the Graduate School verifies that the student is eligible for a remission and forwards the information to the Bursar’s Office for processing.
2. Sends an email to program/dept confirming Graduate School approval.

Questions?
Linda Scholl, linda.scholl@wisc.edu, 5-5522
NIH/NRSA Fellows and Trainees

Background

National Institutes of Health National Research Service Award Training Grants and Fellowships support research and training experiences in specified areas of biomedical, behavioral and clinical research. Departments pay full in- and out-of-state tuition and fees for these fellows/trainees from the training grant funds, with any shortfall covered by the Graduate School. For more information on these awards, visit the Graduate School’s KB document on NIH/NRSA Training Grants: https://kb.wisc.edu/gsadminkb/page.php?id=34811.

Responsibilities of Unit/Training Grant Staff

1. Each fall, spring, and summer term, submit a third-party deferral form (http://www.bussvc.wisc.edu/bursar/dept3rd.html) for non-resident and resident portions of tuition and fees directly to bursar.

2. When the bursar sends an invoice, pay full tuition and seg fees. For instructions on submitting third-party payments, visit the bursar’s website: http://www.bussvc.wisc.edu/bursar/interinfo.html.

3. Set up payroll.

4. Process benefits packet including direct deposit authorization.

5. Fill out a shortfall form (https://kb.wisc.edu/gsadminkb/page.php?id=33330) at the close of the grant (annually for training grants or at the end of the fellowship period) to transfer excess tuition and fringes costs for predoctoral trainees and fellows.

Responsibilities of Graduate School

1. Provides information and support for faculty and staff involved in these grants/fellowships.

2. Provides funding for shortfall.

Questions?

Nick Novak, nick.novak@wisc.edu, 5-4868
Fellows paid directly by an outside agency

**Background**

External funding agencies awarding fellowships sometimes have regulations stipulating that fellows must be paid directly by the agency (without funneling the funds through the university). Other times, external funders are flexible about how the fellows are paid. These different methods of payment each have advantages and disadvantages related to tuition coverage, stipend levels, and fringe benefits. Students, advisors, and programs/departments should understand these advantages and disadvantages before a fellowship application is submitted. In those cases in which an external agency specifies that its fellows must be paid directly, the student becomes fully responsible for all graduate school expenses, including payment of the nonresident portion of tuition if s/he is not a Wisconsin resident.

**Responsibility of Student**

The student is responsible for paying tuition, segregated fees, and arranging any health insurance coverage.

**Responsibility of Graduate School**

The Graduate School can advise students, faculty, and staff on the regulations of external funding agencies and provide information on the advantages and disadvantages of various fellowship structures. Factors including tuition coverage, stipend levels, cost of education allowances, and fringe benefits may all impact the structure of the fellowship. The Graduate School may be able to negotiate the terms and conditions of the fellowship with the funding agency before it makes the award.

**Questions?**

Irina Diaz, [irina.diaz@wisc.edu](mailto:irina.diaz@wisc.edu), 890-0738.
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<thead>
<tr>
<th>Type of Appointment</th>
<th>Program/Dept</th>
<th>Graduate School</th>
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<tbody>
<tr>
<td><strong>Graduate Assistants:</strong></td>
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<tr>
<td>• Teaching Assistants</td>
<td>1. Sets up payroll appts</td>
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<td>• Project Assistants</td>
<td>2. Processes benefits forms and direct deposit authorizations</td>
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<td>• Research Assistants</td>
<td>3. Submits tuition remission authorization form directly to bursar each fall and spring terms</td>
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<td>• Lecturer Students Assts. (LSAs)</td>
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<tr>
<td><strong>University Fellows, Chancellor's Fellows, Dickie Fellows, Mellon-Wisconsin Summer Fellows, and Grad School-supported External Fellows</strong></td>
<td>Processes benefits forms and direct deposit authorizations</td>
<td>1. Sets up payroll appts</td>
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<td></td>
<td></td>
<td>2. Remits the non-resident portion of Fellow's tuition</td>
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<td>3. Pays Fellow's resident tuition and fees</td>
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<td><strong>Wisconsin Distinguished Graduate Fellows</strong></td>
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<td></td>
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<td></td>
<td>2. Processes benefits forms and direct deposit authorizations</td>
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<td></td>
<td>3. Submits non-resident tuition remission authorization form directly to bursar each fall and spring term</td>
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<td>4. Submits third-party deferral form directly to bursar each term</td>
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<td>5. Bills half of all tuition and flex funds payments to dept and half to Grad School</td>
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<tr>
<td><strong>External Fellows qualifying for non-resident tuition remission</strong></td>
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<td>Approves non-resident tuition remission and submits tuition remission authorization form to bursar for processing</td>
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<td></td>
<td>1. Sets up payroll appts</td>
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<td></td>
<td>2. Processes benefits forms and direct deposit authorizations</td>
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<tr>
<td></td>
<td>3. Submits Fellowship Information Form to <a href="mailto:offr@grad.wisc.edu">offr@grad.wisc.edu</a> for coverage of non-resident portion of student's tuition</td>
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<td>4. Submits third-party deferral form directly to bursar for fellows' resident tuition</td>
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<tr>
<td><strong>AOF Fellows</strong></td>
<td>Works with School/College GRS Coordinator to determine payroll and remission responsibilities</td>
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<tr>
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