

# GRADUATE FELLOW APPOINTMENT FORM - INSTRUCTIONS

Academic departments, graduate programs, and training grant principal Investigators may appoint graduate students as graduate fellows if they meet eligibility requirements as outlined in OSU's [Policy and Procedures for Graduate Fellows and Graduate Trainees](#).

Graduate fellowships are non-service/non-payroll appointments (not employment). The purpose of this appointment is to identify graduate fellows who are eligible for health insurance coverage, access to travel insurance, and workers' compensation as applicable under workers' compensation law. All graduate fellows must be enrolled for a minimum of 9 credits per term during the academic year and 3 credits during the summer throughout the duration of their formal appointment as a graduate fellow to receive their stipend payments. Some fellowships may require enrollment at higher levels, including those receiving institutional tuition support and/or as specified by the fellowship sponsor.

Graduate Fellows appointments cannot be made unless the appointee meets all appointment requirements: [Graduate Fellow Defined](#). Please ensure these requirements are met before making the offer to the individual student.

Before initiating a graduate fellowship appointment, please review the existing OSU employment status of the individual you wish to appoint as a graduate fellow. It may become necessary to terminate an existing graduate assistantship if it overlaps the proposed graduate fellowship appointment period. Many sponsors prohibit concurrent acceptance of other major fellowships and restrict employment that may delay and/or jeopardize timely degree progress and/or generate substantial income. Engagement in teaching is typically limited to furtherance of degree objectives, not service to the institution. Teaching activities typically take place during periods when fellows are either on reserve status or when their fellowship period has ended. Please note that in the unusual circumstance a graduate fellow is appointed *concurrently* as a graduate assistant, the graduate assistantship will serve as the *primary* OSU appointment, with tuition remission and health insurance subsidy paid by the assistantship. Please contact OPAA or the Graduate School before making a concurrent appointment.

## Section I

The appointing department, graduate program or training grant principal investigator is to complete all fields in Section I. Demographic information may be found in the Banner general person record.

A graduate fellow Banner position number is needed to complete this section. If your college/unit does not have one established for your orgn code, email Jennifer Short in the Office of Human Resources at [jennifer.short@oregonstate.edu](mailto:jennifer.short@oregonstate.edu) and provide your orgn code and index. Graduate fellow position numbers begin with C97xxx. The same pooled position number is used for all graduate fellows in the same home organization code.

Appointments should be made for one contract year only. Multi-year fellowships are to be renewed annually. For institutional fellowships, contract periods will typically fall within the fiscal year, beginning no sooner than July 1 and ending no later than June 30. In contrast, some federally sponsored contract years begin September 1 and end August 31. For the latter, the one-year contract period may

bridge into the next OSU fiscal year. You may cross fiscal years, but the appointments should be made for one contract year only.

If it becomes necessary to end a graduate fellowship appointment before the original appointment end date transpires, please submit an appointment form, indicating the new end date and reason for ending the appointment. Involuntary terminations require a statement from the external funding agency and/or the academic department, graduate program, or principal investigator outlining the circumstances that warrant ending the appointment before the original or renewal appointment end date. This documentation should be attached to the form.

## **Complete Section II or III as follows (choose only one section to complete):**

### **Section II**

The appointing department or graduate program is to complete this section for graduate fellows supported only by *institutional* funds. Examples include fellowships funded by OSU Foundation accounts and the Diversity Advancement Pipeline Fellowship.

Completion of this form facilitates graduate fellow access to insurance, but does *not* disburse stipend funds. To request stipend disbursements for internally-funded graduate fellowships, please log on to the OSU Scholarship Management System (SMS) which is available on the Office of Budget and Fiscal Planning "[Online Systems](#)" web, and schedule your stipend disbursement using the *OSU Scholarship Payment Plan Management* feature. Questions regarding this procedure may be directed to the Office of Financial Aid and Scholarships.

### **Section III**

The appointing department, graduate program, or training grant principal investigator is to complete this section only for graduate fellows supported by *externally-funded sources*. Examples include, but are not limited to, NSF-IGERT, NASA, EPA STAR, USDA-NAS-NNF, NIH-NRSA fellowships.

Note the name of the sponsoring agency and whether the fellowship stipend is to be paid via the Office for Sponsored Research and Award Administration (OSRAA) or will be paid directly by the sponsor. Keep in mind that eligibility requirements for qualifying graduate fellowships specify the fellowship must be administered in part or in full by Oregon State University.

Select fellowship type indicating whether the fellowship is an individual fellowship or is funded under a training grant and/or other externally-funded institutional award. If fellow is funded under a training grant and/or other externally-funded institutional award, include the name of the Principal Investigator and the OSU index. If the fellow has an individual fellowship, include the student's major professor and the OSU index for the graduate fellowship, if available.

Completion of Section III of this form facilitates graduate fellow access to insurance, and also initiates disbursement of externally-funded stipend funds. List both the monthly and total annual stipend amounts.

If the fellowship includes tuition/fees support, mark “yes” as applicable for each and note which terms should be covered. Stipends authorized through the Office for Sponsored Research and Award Administration (OSRAA) and issued by Business Affairs will be issued to the fellow’s current vendor payment address.

## **Section IV – Approvals / Signatures**

### **Routing via DocuSign**

1. Dept head/chair (ALL appointments)
2. OSRAA – [osraa@oregonstate.edu](mailto:osraa@oregonstate.edu) (Section III appointments only)
3. Business Affairs – [greg.balck@oregonstate.edu](mailto:greg.balck@oregonstate.edu) (Section III appointments only)
4. Graduate School – [nick.fleury@oregonstate.edu](mailto:nick.fleury@oregonstate.edu) (ALL appointments)
5. Human Resources – [hrrservicecenter@oregonstate.edu](mailto:hrrservicecenter@oregonstate.edu) (ALL appointments)

CC the following for ALL appointments:

[gradhealth@oregonstate.edu](mailto:gradhealth@oregonstate.edu)

CC the following for Section III appointments:

- a. Fellowship Payments – [benjamin.garcia@oregonstate.edu](mailto:benjamin.garcia@oregonstate.edu)
- b. [thirdpartybilling@oregonstate.edu](mailto:thirdpartybilling@oregonstate.edu) should also be included if tuition paid on behalf of student by external award

### **Where to send completed form (if not routed via DocuSign)**

Once form is complete and signed by department, send form and attachments to:

**For institutionally-funded fellowships (Section II only):**

Graduate School  
[graduate.scholarships@oregonstate.edu](mailto:graduate.scholarships@oregonstate.edu)  
Oregon State University  
2900 SW Jefferson Way  
Corvallis, OR 97331

**For externally-funded fellowships (Section III only):**

Office for Sponsored Research and Award Administration (OSRAA)  
[osraa@oregonstate.edu](mailto:osraa@oregonstate.edu)  
Oregon State University  
306 Kerr Administration Building  
Corvallis, OR 97331

## Items to attach to this form (Required, and must be attached for approval and processing):

For institutionally-funded fellowships original and renewal appointments only (i.e., those recorded in Section II):

- A copy of the signed letter of offer from the OSU department indicating acceptance of the award--model letters can be found on the [OHR website](#).
- For voluntary terminations, include a copy of the student's letter of resignation (copy of an email is acceptable).
- For involuntary terminations, provide a copy of the statement from the academic department or graduate program outlining the circumstances that warrant ending the appointment before the original or renewal appointment end date.

For externally-funded fellowships only (i.e., those recorded in Section III):

- A copy of the award letter from sponsoring agency (for individual external fellowships only); *and*
- A copy of the signed letter of offer from the OSU department offering the fellowship appointment, indicating acceptance of the award--model letters can be found on the [Graduate School website](#).
- For voluntary terminations, include a copy of the student's letter of resignation (copy of an email is acceptable).
- For involuntary terminations, provide a copy of the statement from the external funding agency and/or the academic department, graduate program, or principal investigator outlining the circumstances that warrant ending the appointment before the original or renewal appointment end date.
- OPTIONAL: Vendor Payment Request (OSCAR--[Activation & Maintenance Request for Reimbursement Payments](#))

## Task expert

Nick Fleury, Director of Financial Support  
(541) 737-0450 or [nick.fleury@oregonstate.edu](mailto:nick.fleury@oregonstate.edu)