

OSU Graduate Fellowship Handbook

for appointed
Graduate Fellows
2022-2023



Oregon State
University

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Glossary of Terms

The definitions provided for the common terms are by no means exhaustive. These definitions are limited to the context of graduate appointments through Oregon State University. Terminology at other institutions and for other appointment types at OSU will vary from those defined below.

Appointment – The formalized setup of a position through [OSU Human Resources](#). Most appointments indicate a student is employed by OSU, but there is a special appointment category for Graduate Fellowships in order to provide benefits.

Assistantship – A category of graduate employment, which is either a [graduate research assistantship \(GRA\)](#) working on a specified grant project or a [graduate teaching assistantship \(GTA\)](#) working to provide support or instruction for courses. These are commonly referred to as GA appointments, and are unionized positions under a [collective bargaining agreement](#).

Award – Typically interchangeable with scholarship, this refers to a monetary amount directly applied to a student account in recognition of the student's contributions to OSU. Awards can vary from one-time amounts to full tuition support for an academic year and more.

CBA – [Collective Bargaining Agreement](#): An agreement between OSU and the CGE which outlines rights, responsibilities, appointments, salaries, benefits, etc., for all Graduate Employees on Assistantships. This is a mutually-agreed contract that has a typical duration of four years after negotiations between the union and OSU administration.

CGE – [Coalition of Graduate Employees](#): Local chapter of union representing Graduate Employees, i.e. on appointed assistantships.

Educational Allowance – a.k.a. Institutional Allowance or University Allowance: Monetary support provided as part of a fellowship award. It is for use by the institution to partially offset the cost of attendance for the awarded fellow (e.g. tuition, fees, health insurance), fellowship administration, indirect costs for university facilities/equipment use, and other support costs related to the fellowship appointment.

FTE – Full-Time Equivalent: A decimal used to show a position in terms of the number of hours of contribution compared to a full-time position of 40 hours per week, i.e. 2080 hours per year. Fellowship appointments at OSU are .49 FTE, so the expected effort while on appointment towards the fellowship is 19.6 hours, on average, per week, or 255 hours over a 13-week appointed term.

Fellowship – A special appointment position at OSU, which qualifies a student for [resident tuition rates](#) and health care coverage for the student and dependents. [Fellowships](#) are not employees, but it is the intent of the institution to ensure that an incentive remains for graduate students to seek competitive graduate fellowship support and for graduate fellows to be recognized and honored for the distinction that they bring to themselves and to the university as a result of their success. Graduate Fellowships must meet a number of requirements in order for appointment.

Health Insurance Premium – Total monthly charge paid monthly for health insurance coverage. A portion of the total charge is covered by OSU and the remaining amount is charged to the student account each month during coverage. The remaining portion is to be paid by the fellow, unless their specific funding covers their insurance expenses.

Remission (Tuition) – Reversal of tuition charges on a student account for a student on a qualified assistantship appointment. At present per the CBA, [remissions](#) cover up to 16 credits of enrollment each academic term. Remissions are provided from the same funding source as the graduate employee's wages.

Scholarship – Typically interchangeable with award, this refers to a monetary amount directly applied to a student account in recognition of the student's contributions to OSU. Awards can vary from one-time amounts to full tuition support for an academic year and more.

Stipend – Monetary allowance, provided in advance either monthly or quarterly, to provide funding to offset living and personal expenses for a student on a fellowship. Stipends vary from wages and salary in federal/state tax implications, they are not provided for work, and are paid in advance.

Student Allowance – a.k.a. Research Allowance - Monetary support provided as part of a fellowship award. It is for use directly by the awarded student for material/equipment needs as part of the award, expected travel expenses, printing and publication costs, and/or for other expenses normally not provided by the institution.

Training Grant – Funds used to support graduate fellows whose stipends are paid by an eligible university unit or directly by the institution via competitive [training grants and/or portable external fellowships](#). Fellows on training grants typically have a mentor-mentee relationship with a faculty member to guide the completion of the external granting agencies requirements.

Tuition Plateau – A flat tuition rate charged regardless of the number of credits of enrollment. [For most masters and PhD programs](#), this exists between 9 and 16 credits each term, with the exception of Ecampus courses and specific rates listed yearly on tuition tables.

Tuition Support Request – A formalized request submitted yearly by the 3rd Monday in February to the Graduate School to provide a full or top-up tuition waiver to a student receiving a qualifying fellowship. This is available to students on qualifying fellowships that provide partial or no tuition support.

Top-Up Funding – A partial or full award, scholarship or tuition waiver provided to meet fellowship requirements for appointment for tuition support and/or minimum stipend level.

OSUF – [Oregon State University Foundation](#): A 501 (c) 3 nonprofit organization administering a number of accounts that provide quarterly stipends as fellowships to graduate students. [Tuition support](#) is provided through the Graduate School's tuition support request form.

Waiver (Tuition) – An award/scholarship applied to a student account to cover all or part of the tuition charges to a student in an academic term. For appointed fellowships, waivers cover up to 12 credits of enrollment each academic term, not including summer term.

I. Purpose

Fellowships are an important source of funding designed to help graduate students meet their educational and research expenses. The Graduate School and academic colleges/departments award a number of fellowships, while external agencies such as the National Science Foundation and the Social Sciences Research Council award others. Your academic department is your primary resource for information about funding opportunities, both internal and external.

At Oregon State University, Graduate Fellowship appointments are a specific type of appointment set up through the Office of Human Resources. These fellowship appointments are not employment, but are mentored by Graduate faculty members, receive financial and tuition support, as well as health benefits. The purpose of this handbook is to clarify the administrative process as well as the general expectations of an OSU-appointed Graduate Fellow.

Other units across campus are regularly involved in the appointment process, including an appointee's academic unit/college, the Research Office, Business Affairs, the Office of Human Resources, and the Office of Financial Aid. Be sure to visit their respective sites for information on policies and procedures, which are subject to change and update.

II. Message from the Director of Financial Support

September 20, 2022

First off, I want to congratulate you being appointed as an OSU Graduate Fellow! This appointment is a clear indication of your prior academic and research successes as well as your demonstrated potential to contribute to the continuing research and land-grant mission of Oregon State University.

While appointed OSU fellowships number around 200 each year, there is a dedicated team working to financially and academically support you through your graduate degree program. I will serve as a first point-of-contact to navigate the financial logistics of your fellowship appointment. This is to aid you in focusing on your own degree objectives. Be sure to work with your graduate program coordinator and faculty mentor as you develop and hone your academic and research interests.



Though fellowships are relatively small in number, there are many different types through OSU. Funding for living support, tuition, fees, health insurance, and other costs associated with graduate degree enrollment can vary. This handbook is a resource to help you better understand the structures associated with your fellowship appointment.

Feel free to reach out with any questions or concerns you have prior, during, or post fellowship appointment. I can be reached directly via email at nick.fleury@oregonstate.edu or via phone at 541-737-0450.

Once again, congratulations on your achievement. I wish you continued success in your academic and research pursuits.

Yours truly,



Nick Fleury, M.P.A., M.C.R.P.
Director of Financial Support
Graduate School, Oregon State University

III. Appointing Graduate Fellowships

A. OSU Defined – Appointed Graduate Fellowships

Graduate fellowships and traineeships (herein referred to as graduate fellowships) are recognized nationally as a means to acknowledge and support outstanding graduate students in pursuit of their advanced degree objectives. Graduate fellowships provide financial support to graduate students without a commensurate work requirement.

Graduate fellowships vary widely by their purpose, selectivity, duration, and support level. They are often awarded at a specific stage in the educational continuum. They may be supported by either internal or external sources of funds.

Graduate Fellowships are a specific appointment type at Oregon State University that meet all of the following requirements:

1. The Fellow is admitted as a graduate degree-seeking student at Oregon State University;
2. The Fellow is currently enrolled full-time at Oregon State University, completing a minimum of 9 credits per term during the academic year (12 credits if receiving tuition support from any of the Graduate School's tuition waiver support programs); 3 credits during summer session;
3. The Fellow is awarded a graduate fellowship and/or traineeship that can be independently and transparently identified;
4. The Fellow is awarded a graduate fellowship and/or traineeship with a stipend that is administered in part or in full by Oregon State University, and that throughout the fellowship award period meets or exceeds the prevailing recommended minimum rate for .49 FTE graduate appointments as established annually by the Graduate School (currently \$2040 per month for 2022-2023);
5. The Fellow is awarded a graduate fellowship and/or traineeship that provides funding for the cost of the minimum required tuition enrollment (either independently or in combination with any of the Graduate School's tuition waiver support programs); and
6. The Fellow is funded by a single source of funds, and either:
 - a. Be sponsored by NSF (GRFP, GK-12, IGERT); NASA (ESSF); EPA (STAR); NIH(NRSA; NIEHS); USDA (FAS NFF); or those in partnership with the National Academies of Sciences including the Ford Foundation; or
 - b. Be sponsored, such as through the OSU Foundation or other authorized funds designated by the Provost for strategic purposes, with a fund dedicated to providing stipends to graduate fellowships.

B. Differences from Assistantships

[OSU Graduate Fellowships](#) are not associated with a formal work requirement. Graduate fellowships provide a living stipend, graduate fellow health insurance premiums, and tuition support, and may also include support for mandatory fees. Graduate fellowships do not have a commensurate service requirement. Graduate Fellows are not employees of OSU, and appointments are not governed by contractual bodies.

External awards may use the term “fellowship” to describe financial awards, including scholarships, that support a graduate student’s education, but many of these ‘fellowship-like’ awards do not meet the criteria for a Graduate Fellowships as [defined at OSU](#).

[OSU Graduate Assistantships](#) are a form of employment to the institution.

Graduate Assistantship appointments at OSU are ultimately governed by the contract agreement between OSU and the Coalition of Graduate Employees, American Federation of Teachers Local 6069. The [CGE contract](#) takes precedence over all other published information.

Departments should consult the [Office of Human Resources](#) and the CGE contract for definitive employment rules and regulations concerning Graduate Assistant appointments.

Changing between fellowship and assistantship appointments

While graduate assistantships remain the most common form of graduate student funding at OSU, an increasing number of advanced degree students receive all or part of their financial support through fellowships and traineeships. Financial support for any given student is often comprised of a blend of assistantship, fellowship, and traineeship periods throughout a student's degree program. As the type of financial support changes, the graduate student's need for continuation of health insurance benefits often remains constant.

Graduate students who migrate from an assistantship to a fellowship (or vice versa) without a gap in sequential appointment will not be required to submit a new health insurance enrollment or waiver form. Questions concerning health insurance enrollment should be directed to the Office of Human Resources, gradhealth@oregonstate.edu, 541-737-7568.

Students who shift between different appointment types should be aware of the change in the stipend/wage support as well. As [fellowship stipends are prepaid](#) and [assistantship wages are post-paid](#), students will receive payments close together when shifting from an assistantship to a fellowship. However, when shifting from a fellowship to an assistantship appointment, there could be upwards of 60 days between regular monthly payments. For example:

Assistantship appointment ends 09/15, fellowship appointment begins 09/16

- September assistantship wages – ½ month paid last working day of Sept
- September fellowship stipend – ½ month disbursed mid-Sept
- October fellowship stipend – full month disbursed late-Sept/early-Oct

Fellowship appointment ends 09/15, assistantship appointment begins 09/16

- September fellowship stipend – ½ month disbursed late-Aug/early-Sept
- September assistantship wages – ½ month paid last working day of Sept
- October assistantship wages – full month paid last working day of Oct

If you do end up moving between fellowship and assistantship appointments, you should plan accordingly to financially cover this time gap in regular stipend-to-wage payments.

IV. Expectations of Appointment

A. Student Responsibilities

Time Commitment

Fellowship appointments at OSU are .49 FTE, so your expected effort while on appointment towards the fellowship is 19.6 hours, on average, per week, or 255 hours over a 13-week appointed term.

This time is not monitored as it would be for an employment position. As appointed fellows, you are expected to put forth the effort necessary to meet educational, research, or award objectives. Some awards will have specific deliverables. Other awards are merit-based, and appointed fellows should use the time to explore their own research and educational interests that focus or augment their existing program of study.

Mentor-Mentee Relationship

The [mentor](#) role varies considerably from student to student, since some fellowship awards have detailed requirements related to mentorship and others provide no stipulations as part of your award.

Your faculty mentor can recommend specific reading, research/lab shadowing opportunities, potential projects that can lead to individual research initiatives, or guide you to other resources/contacts inside and outside OSU to help accomplish your educational objectives. Appointed fellows should consider their positions as self-initiated, so it is dependent upon you to seek out resources, support, and opportunities that will aid their interests.

Teaching

While receiving the graduate fellowship, you cannot work as a graduate teaching assistant. Should you as an appointed fellow wish to teach as part of their educational objectives, you will need to pursue this activity once the fellowship has ended.

External Proposal/Reporting/Products

Depending on your fellowship, you may be required to report back to award agency/sponsor. Types of reporting include, but are not limited to:

- Periodic reports of accomplishment and/or degree/research progress, which can range from monthly to annual reports.
- Copies of completed/submitted publications, manuscripts, theses, or dissertations, as an award may be provided to aid in completion of specific research interests.
- Evaluations from mentors, departments, etc., on the fellow's progress towards educational/research objectives.
- Verification of enrollment, confirmation of satisfactory academic progress, or documentation of degree completion. Reporting will vary based upon the external award, so please check your original award notice for details on satisfying requirements.

B. Responsible Conduct of Research & Ethics

Information in this section is largely from the Research Office's [Responsible Conduct of Research webpage](#).

The Responsible Conduct of Research (RCR) Program at Oregon State University was designed to meet the requirements outlined in Section 7009 of the America COMPETES Act, which mandates training in the responsible conduct of research for all proposals submitted. OSU's work in this domain is undertaken in cooperation with other offices at OSU, including the [Office of Research Integrity](#) and the [Graduate School](#).

While RCR may be a specific requirement for appointed fellows receiving funding through NSF, other granting agencies will require or recommend students receive the same type of training.

The OSU RCR program provides a basic education in the responsible conduct of research. This program is multi-tiered, and provides a framework to help participants recognize ethical situations, define an appropriate standard of behavior, and assist in identifying resources if problems or issues arise.

Principal investigators on funded projects have the annual responsibility of engaging all students, both undergraduate and graduate, and post-doctoral fellows in discussions about the responsible conduct of research. Topics to be considered for discussion, may potentially include: publication practices and responsible authorship; mentorship/trainee responsibilities; data acquisition, management, sharing and ownership; peer review; and collaborative research and working on a research team. Resources, both internally prepared and as made available by federal agencies such as NSF or HHS, will be readily accessible to faculty to assist them in conducting these discussions.

In addition, all students within the [National Science Foundation – Graduate Research Fellowship Program](#) (NSF-GRFP) will be expected to complete an on-line training program on the Responsible Conduct of Research. OSU has engaged the University of Miami's [CITI program](#), which offers several different RCR discipline-focused programs. This program provides an electronic verification of those who have completed the program.

OSU RCR Program Framework

The program includes two formal levels of training, in addition to other resources available to all OSU faculty, staff and students:

- All undergraduate, graduate students and post-doctoral fellows will participate in Principal Investigator-led discussions; however, undergraduates involved on an NSF-funded project for one month or less are exempted from the training requirement.
- All graduate students and postdoctoral researchers must participate in the on-line training and certification program.
- Additional optional educational opportunities are available for all participants.

Principal Investigator-led Discussions

Required Participants: All NSF-funded Undergraduate Students, Graduate Students, Postdoctoral researchers

Students and post-docs supported by NSF funds will meet with their NSF PI to discuss the RCR-applicable topics. Specifically, the requirements are:

- PIs will be required to certify annually that the required discussions have been held with all individual to whom the NSF policy applies.
- PIs will be expected to conduct discussions on topics such as:
 - Publication practices and responsible authorship;
 - Mentorship/trainee responsibilities;
 - Data acquisition, management, sharing and ownership;
 - Peer review; and
 - Collaborative research and working on a research team.
- PI explanation on certification of key points covered in this areas
- PIs must direct NSF-funded graduate students and post-docs to complete the on-line CITI training and certification program.
- The PI will define any additional specific regulatory forums (e.g., IRB, IBC, IACUC) that students or post-docs must attend.

Resources to assist PIs in their preparations for these discussions are available:

<http://research.oregonstate.edu/ori/responsible-conduct-research>

Web-Based Training

Required Participants: All NSF-funded Graduate Students, Postdoctoral researchers

This web-based course broadly covers responsible conduct of research topics. This course provides a foundation of information and will serve as a basis for more in-depth discussions about research integrity. The web-based course is accessible at no charge through any OSU computer by selecting Oregon State University as the affiliate organization when registering as a user of the [CITI Program](#).

CITI RCR web course (required; electronic certification)

Additional information located at: <http://research.oregonstate.edu/ori/responsible-conduct-research>

C. Receiving Supplemental Funds

Graduate fellowship sponsors, both internal and external to OSU, typically require their recipients to devote full-time effort toward pursuit of the advanced degree. Many sponsors prohibit concurrent acceptance of other major fellowships and restrict employment that may delay and/or jeopardize timely degree progress and generate substantial income.

While on an OSU-appointed fellowship, you cannot be employed in any other capacity through Oregon State University. While OSU may not restrict concurrent and external employment to OSU while on appointment, you are responsible for complying with any requirements of the external award.

Most sponsors permit you to secure additional resources to offset degree-related research expenses, such as travel support, field, and/or laboratory costs to the extent such supplementation is permitted.

The determination of the appropriateness of supplementation will be guided by the graduate fellowship sponsor's unique guidelines. It is your responsibility as a graduate fellow to understand and adhere to the terms of your awarded fellowship.

V. Benefits of Appointment

A. Stipend

When you are on appointed fellowships, you will receive a pre-paid amount either each month or quarter (OSU academic term), corresponding to the type of fellowship. This payment is credited either directly to your business (also called vendor) account, if monthly, or directly to the student account, if quarterly. The purpose of this direct payment is to assist you in covering living expenses.

Many fellows perceive these payments as wages, but they are not provided for a direct work service. Additional, wages at OSU and most other places of employment come after work completed. Stipends, on the other hand, are provided to you in advance to cover expenses to allow you to focus on educational and research initiatives.

Please refer to your fellowship letter of offer for information regarding whether receiving monthly payments or quarterly (i.e. term) payments.

B. Tuition Support

When on an OSU-appointed fellowship, a grant, department unit, college, OSU-administered fund, and/or external entity will cover the tuition cost each term of your enrollment during the fellowship period. If an OSU-administered fund is providing any level of tuition support for your fellowship, you must enroll in at least 12 credits each academic term (fall, winter, spring). The tuition cost will be covered up to 12 credits. If an external funder is providing full tuition coverage, OSU policy allows enrollment at 9 credits, but be sure to check the fellowship offer letter for expected enrollment expectations.

Tuition support for appointed fellowships is referred to as a waiver. The tuition is charged to your student account at the resident rate of your college/program, but you are waived from having to cover the tuition costs, as an entity has agreed to place a scholarship on your account for the tuition cost. If the tuition support is provided by the Graduate School, a college, or your academic unit, the tuition scholarship will appear on your student account on or before the first day of the academic term. If you have a summer appointment, it will appear during the first week of July. If the tuition scholarship is from an external grant but administered through OSU, the tuition will normally apply during the 3rd week of the term.

If you are receiving tuition support directly, you will be responsible for making the payment to the student account. To avoid interest charges and late fees, prompt payment is required.

For some fellows, tuition support is paid on your behalf by the external award. This process is known as third party billing. Reach out to thirdpartybilling@oregonstate.edu if this is your situation.

C. Fee Support

Fee coverage will vary for appointed fellowships, and can vary from no coverage to full coverage of fees. For full-time academic term enrollment, fees are currently \$746.26 during the 2022-2023 academic year. Summer fees were \$278.30 in Summer 2022, and are estimated to be ~\$292 with three credits of enrollment in Summer 2023.

Some mechanisms of fee support include:

- Provost Fellowship and other college/program unit fellowships – a subsidy provided each quarter as relief of a portion of the fees each term. This is normally included with the quarterly fellowship stipend payment, so you will see the amount in excess of your published stipend amount. At present, the Graduate School provides a \$650 subsidy for fees on qualifying fellowships like the Provost Fellowship during the academic year and \$450 in the summer term.
- With a sufficient external educational (or university/institutional) allowance, fees can be covered in full each term. This will be credited on your behalf on the student account usually by week three of academic term.
- A separate scholarship from an academic unit each quarter to cover a portion of your fees. This may be added to make fellowship appointments have the same financial support as assistantships, who have ~90% of the fees covered each academic term.
- No support at all, with the full cost on the student account. In this case, the student is responsible for covering the full cost of the [term fees](#). You may consider using Financial Aid if you filed an application and are eligible. Typically, graduate students are only eligible for student loans.

D. Summer Support

Coverage of summer tuition can vary, as it may be included in your summer stipend amount, provided by a different fund, or it may be your responsibility to pay for it. Tuition scholarships provided by the Graduate School for OSU Foundation fellowships, as well as external/training grant appointments, do not have a provision for summer term. Contact the academic unit to find out about summer tuition coverage on OSU Foundation fellowships. For external/training grants, check with your letter of appointment documentation.

Students are not required to enroll in summer if the fellowship appointment is only during fall, winter, and/or spring. However, if your fellowship appointment is active between June 16 and September 15, you will be required to enroll in three graduate credits.

E. Health Insurance

Information in this section is largely from the Office of Human Resource's [Graduate Student Insurance Plan webpage](#). For appointments that begin on or after the 16th of the month, insurance coverage will start on the 1st of the upcoming month. For example, most appointments begin on September 16, so insurance coverage will start on October 1st.

Mandatory insurance for appointed Graduate Fellows is provided by PacificSource.

The Graduate Employee Health Plan through PacificSource includes coverage for medical, dental, and vision services. No paperwork is required since you are automatically enrolled in employee/fellow-only coverage. You will only need to submit an enrollment form if you are enrolling dependents to your plan

Enrollment Waiver

Employees & Fellows eligible for the Graduate Student Employee plan may apply for a waiver to decline coverage if they have an employer group plan that has equal or superior coverage to the PacificSource Health Plan offered by OSU. [Waiver applications](#) must meet the waiver criteria to be granted approval by the university.

You will need to submit the waiver application form, copy of insurance cards, and summary of benefits detailing your plan coverage to University Human Resources Graduate Benefits by the first of the month for which you are eligible (October 1st for fall term). You will be notified via email with a decision of waiver approval or denial. Denied waivers result in automatic enrollment in the plan offered by the university.

Premiums

Oregon State University contributes 90% of the premium for the fellow and dependent coverage, plus 50% of the administration fee. The remaining 10% of the premium for the fellow and dependent coverage and 50% of the administration fee is charged to the OSU student account monthly. This portion is to be paid by the fellow, unless their specific funding covers their insurance expenses.

Premiums will be charged to your OSU student account at the end of each month that you have coverage. Graduate Fellows are financially responsible for prompt payment of these expenses.

2022-2023 premiums

	Fellow only	Fellow + spouse/partner	Fellow + child(ren)	Fellow + family	Dental only (no OSU contribution)
Cost (per month)	\$60.28	\$119.44	\$101.68	\$160.84	\$51.32

Family Members

Eligible dependents can be enrolled onto your plan:

- Within the first 30 days of your fellowship start date
- During the fall term open enrollment period
- When a qualifying life event occurs

Qualifying life events include: birth, marriage, permanent move to U.S., adoption, involuntary loss of other group coverage, etc.

Once enrolled, you may only remove your dependents from your plan during fall term open enrollment, or when a qualifying life event occurs. A qualifying event in this case could be:

divorce/separation, dependent gains other health coverage, or dependent moves outside the U.S.

Summer coverage (when not on appointment over summer term)

If you do not have a fellowship during summer months, but have a fellowship during at least one term of the preceding academic year, and are returning as a student enrolled in the Graduate School either summer or fall term, you are eligible to sign up and prepay for summer coverage.

NOTE: If you are graduating prior to summer term, and/or you will not return as an enrolled student in either summer or fall term, then you are not eligible to enroll in summer session coverage.

The summer session insurance includes the same level of PacificSource Health coverage for July, August, and September as was held during the prior academic year. The premiums are triple charged to your OSU student account in May, prior to summer session. No premiums are charged in July, August, or September if premiums are prepaid in May.

Deadline to enroll varies by the term your fellowship ends. No changes are allowed after this deadline.

- Fall term appointment (typically ending 12/15/2022) – December 1, 2022
- Winter term appointment (typically ending 03/15/2023) – March 1, 2023
- **Spring term appointment (typically ending 06/15/2023) – May 1, 2023**

F. Student/Research Allowance

1. Guidelines

A student's fellowship may include specific funding (educational allowance) to offset tuition and fees at Oregon State University. Other fellowships include specific funding for student use (student allowance), primarily for research travel, necessary equipment, publication costs, and professional development opportunities related to the fellowship.

OSU will use educational allowances to cover the cost of mandatory fees each academic term and three credits of summer session tuition and fees. The remaining balance (if any) in the education allowance will be made available to the fellow in furtherance of education, research, or other professional activity in accordance with the sponsoring agency guidelines and OSU administrative policies and procedures.

Student allowances are made completely available for your use, subject to agency guidelines and OSU administrative policies and procedures.

Any education allowance or student allowance fund(s) will be set up under an OSU funding index, and it becomes available to the appointed fellows for use. Any unspent funds at the conclusion of the fellowship appointment are generally surrendered upon completion. These funds will either be refunded to the granting agency or collected to support future appointed graduate students, depending upon the requirements of the external granting agency on use.

2. Permissions

All reimbursements must be preapproved by your supervising professor/mentor in order to be accepted for payment. All expenditures must follow OSU policies and regulations.

For purchases using your index valued under \$1,000, work with your home department using the index provided. Purchases for one item valued at \$1,000 or more or any computer purchases require prior approval from the principal investigator, department head, or coordinating official of the external grant. Requests must be submitted via email and contain the following information:

- need for the expense and appropriateness to degree program,
- endorsement from major professor/mentor, and
- proposed disposition of equipment upon completion of degree program.

3. Budgeting

Be sure to work with your academic unit, principal investigator, or coordinating official on the balance of your research allowance. You are responsible for monitoring expenditures in the index and staying within budget limits at all times; any overages will be your personal responsibility and will be transferred to your student business account requiring payment from you.

Fellows should have expenses directly charged to the index when possible, rather than submitting reimbursement requests. Be aware that there may be specific restrictions on travel operators and expenses when using federal funds, as they may restrict use of funds to US-based companies, operators, etc. For example, when supported by federal funds, any air travel (domestic or international) must be conducted/booked on a US-based airline.

G. Supplementary Funding

Currently at Oregon State University, appointed fellows are able to receive supplementary funding in the form of scholarships and awards. Nominations, applications, and student requirements may vary, so be sure to check the unit administering your scholarship on eligibility.

Any awards/scholarships that exceed the cost of attendance may impact financial aid eligibility and/or annual tax reporting. Appointed fellows are solely responsible for any tax requirements incurred due to fellowship awards or supplementary scholarships. Please see more detail under tax reporting in the Student and Business Accounts section.

H. Eligibility for Forms of Financial Aid

The Office of Financial Aid provides an estimate of full time educational costs for attending Oregon State University for the standard academic year. Costs noted below are standard financial aid budget items and represent an estimate of what students can anticipate spending for tuition and fees, books and supplies, room and board, and personal and miscellaneous expenses. Only billable costs will appear on the student's billing account.

<u>Expense</u>	<u>3 Terms</u>	<u>1 Term</u>
Tuition and Fees (10 CR)	\$16,191	\$5,397
Estimated Billable Cost Total	\$16,191	\$5,397
Books and Supplies	\$600	\$200
Room and Board (on campus)	\$14,238	\$4,746
Personal and Misc.	\$2,247	\$749
Transportation	\$594	\$198
Estimated Non-Billable Cost Total	\$17,679	\$5,893
Estimated TOTAL	\$33,870	\$11,290

When you are appointed as a Graduate Fellow at OSU, the stipend and tuition support amounts are reported directly to the Office of Financial Aid, regardless of how the stipend is provided to you. Depending upon the amount of support you receive from your fellowship, it may affect your ability to receive other forms of aid, including Federal student loans, need-based awards, and financial emergency grants.

Requests to adjust your eligibility for other forms of aid can be made via a Cost of Attendance Revision, available under [Financial Aid Forms](#). Other concerns regarding Financial Aid should be directed to financial.aid@oregonstate.edu or by calling 541-737-2241.

VI. Student and Business Accounts

A. Stipend Payment Schedule

Appointed fellowships administered by OSU will either receive stipend payments on quarterly or monthly basis. Any appointment that is provided as part of a month will be pro-rated. Stipend payments are typically provided in advance, regardless of whether quarterly or monthly.

Quarterly Payment Schedule (e.g. appointment 09/16/2022-09/15/2023):

1. Fall term stipend – credited to student account by 09/26/2022
2. Winter term stipend – credited to student account by 01/09/2023
3. Spring term stipend – credited to student account by 04/03/2023
4. Summer term stipend – credited to student account by 07/07/2023

In order to have the payment credit to your account, you must have at least 12cr of enrollment (fall, winter, spring) or 3cr in summer. Credit to your account will activate a refund to you within two business days, provided your student account balance is covered in full. The refund will either be provided to you by direct deposit (within 3-5 business days) or as a physical check mailed to the current address on file with OSU.

Quarterly payments are handled by the appointing unit, so be sure to reach out to the administrative home of your fellowship.

Monthly Payment Schedule (e.g. appointment 09/16/2022-09/15/2023):

1. September stipend (1/2 payment) – credited to business account by 09/19/2022
2. October stipend (full payment) – credited to business account by 10/03/2022
3. November stipend (full payment) – credited to business account by 11/04/2022
4. December stipend (full payment) – credited to business account by 12/02/2022
5. January stipend (full payment) – credited to business account by 01/06/2023
6. February stipend (full payment) – credited to business account by 02/03/2023
7. March stipend (full payment) - credited to business account by 03/03/2023
8. April stipend (full payment) - credited to business account by 04/03/2023
9. May stipend (full payment) - credited to business account by 05/01/2023
10. June stipend (full payment) - credited to business account by 06/05/2023
11. July stipend (full payment) - credited to business account by 07/07/2023
12. August stipend (full payment) - credited to business account by 08/04/2023
13. September stipend (1/2 payment) - credited to business account by 09/01/2023

In order to have the payment credit to your business account, you must have at least 12cr of enrollment (fall, winter, spring) or 3cr in summer. The payment will either be provided to you by direct deposit (within 3-5 business days) or as a physical check mailed to the address on file with OSU.

Monthly fellowship payments are handled by Business Affairs. Reach out to fellowshippayments@oregonstate.edu with any questions or concerns. If your stipend is not administered by OSU, you will need to connect with the external provider of your fellowship on a payment schedule and method of receiving payment.

B. Tuition/Fee Payment Schedule

Tuition will be covered for an appointed fellow by one of four different processes. These processes are arranged from the most likely to least likely.

1. OSU tuition waiver scholarship

For most fellowships, tuition is provided either by the college/department or through the Graduate School's tuition support program. This tuition support will either be listed in a letter from the same unit that provided a letter of offer, or you receive a tuition support scholarship sent to you by the Graduate School.

You must meet the minimum enrollment requirements in order to receive the tuition scholarship and have it post to your student account. Provide you meet requirements, the scholarship will post as follows.

Quarterly Payment Schedule (e.g. appointment 09/16/2022-09/15/2023):

1. Fall term tuition waiver – credited to student account by 09/21/2022
2. Winter term tuition waiver – credited to student account by 01/09/2023
3. Spring term tuition waiver – credited to student account by 04/03/2023
4. Summer tuition waiver – credited to student account by 07/07/2023

The tuition charge typically appears around the 15th of the month immediately prior to the tuition waiver, but all dates above are 4-6 weeks in advance of the balance due date on your student account for the corresponding term.

Please be aware that appointed fellows will be responsible for any tuition charges and/or fees in excess of the 12 credits. If a student elects to take more than 12cr, tuition and fees will depend upon college, program, campus-coding of the course, or course fees for specific course offerings. The Graduate School and college/department tuition waivers do permit enrollment in Ecampus courses within the 12cr and as allowed by your graduate program of study. The differential payment to cover the cost of the increased tuition will be applied early in week 3 of the corresponding term of appointment and enrollment.

2. Full/partial tuition support included in external award

Some external fellowship awards include tuition support in-part or full for the awarded student. In this case, the tuition support is provided directly by the grant index on to the student account each term of the appointment, provided the student meets the minimum enrollment requirements. These payments will post by the date (whether in-part or in full) as follows.

Quarterly Payment Schedule (e.g. appointment 09/16/2022-09/15/2023):

1. Fall term tuition payment – credited to student account by 10/14/2022
2. Winter term tuition payment – credited to student account by 01/27/2023
3. Spring term tuition payment – credited to student account by 04/21/2023
4. Summer tuition payment – credited to student account by 07/17/2023

The tuition charge typically appears around the 15th of the month immediately prior to the tuition waiver, but all dates above are roughly two weeks in advance of the balance due date on your student account for the corresponding term.

If the tuition support is partial, you will receive an OSU tuition waiver scholarship for the remaining portion, either from your college/department or from the Graduate School. These payments will credit earlier per the OSU tuition waiver scholarship schedule, so expect two separate credits to your account.

Ecampus enrollment, if allowable within the 12cr of enrollment, will generate an increased tuition payment if paid in full by the external award, or a separate payment by the college/department/Graduate School in week 3 of the corresponding term.

3. Tuition support provided directly to student

Many alternatively-funded fellowships provide the award funding directly to the student, including stipend and tuition support. These appointments are set up in order to provide the fellow resident tuition rates and health insurance. For the tuition charged to the student account, you would be responsible for making these payments by the due date each term of your appointment with the resource funding you receive.

4. Tuition support is paid directly by external award to OSU

A small handful of alternatively-funded fellowships will cover tuition costs for a student, but the external organization will provide the funding to OSU upon receipt of the tuition charges. This includes some national laboratories and Fulbright for some country awards. In order to have the tuition charge covered, the fellow must make sure the external grant award agency is in contact with Third Party Billing – thirdpartybilling@oregonstate.edu. This will require set up in advance of the appointment, but Third Party Billing will, in effect, bill the external entity for your actual tuition charges each term. The external entity can then provide payment and credit to your student account. You will be responsible for making sure these payments are timely in order to avoid late charges or interest charges on your account.

5. Fee support

Fellowship appointments do not require fee support. If fee coverage is provided as part of your fellowship, it will likely follow the same schedule as the provider of your tuition support, and it will be credited to your account within the same process.

Be aware that you will be responsible for paying the [term fees](#) if not provided by your fellowship.

C. Health Insurance Premium Schedule

Premiums will be charged to your OSU student account at the end of each month that you have coverage. Graduate Fellows are financially responsible for prompt payment of these expenses.

The 10% premium for your health insurance plan (\$60.28/month for fellow-only health insurance coverage) will appear on your student account each month. Premiums are charged after the start of your coverage, so you will typically see the charge appear on or around the middle of the month of coverage. For example, if your insurance coverage starts in October, you will see the 10% premium charge in mid-October appear on your student account. You will be responsible for ensuring payment of this premium each month by the scheduled due date.

Coverage of the 10% premium will vary with each fellowship. Be sure to refer to your fellowship provider to determine if you will be responsible for paying for the charges that appear on your student account or if your fellowship has funding to cover this amount.

For fellows with third-party billing of health insurance premiums, be sure to submit a copy of the charges as they appear on your student account to ensure timely payment.

D. Student Account Balances/Responsibilities

Appointed fellows who receive monthly stipend payments will receive disbursement on or near the beginning of each month. These are disbursed to your business (vendor) account, so the payment is provided to you in full either by direct deposit or by a physical check sent to your vendor address on file. These are handled by fellowshippayments@oregonstate.edu.

Stipends provided by internal OSU funds, as well as all tuition, fee, and health insurance premium support, all are credited directly to your student account. Your student account includes all other charges levied by OSU related to your academic progress, including parking violations, library fees, student health services fees, printing charges, etc.

Your student account must be paid in full each month to avoid late fees or interest charges. Any outstanding balances for the current term are due as follows:

Student Account Balance Due Schedule:

1. Fall term tuition/fee charges – must be paid in full by 11/01/2022
2. Winter term tuition/fee charges – must be paid in full by 02/01/2023
3. Spring term tuition/fee charges – must be paid in full by 05/01/2023
4. Summer tuition tuition/fee charges – must be paid in full by 08/01/2023

These dates provide a 4-6 week window to have charges paid by your college/department, the Graduate School, directly by you, or by a third party by agreement. Following these dates, charges appearing within a month must be paid in full by the 1st of the following month. For example, health insurance premiums are charged monthly while on a fellowship appointment, so you must make sure these charges are paid in full by the 1st of the following month as specified by your student account billing.

Inability to cover charges will result in late fees, interest charges, and or registration holds on your account, which can impact your ability to progress within your academic program. While programs and external entities will make every effort to make timely payments to your account, having your balance paid in full each month is ultimately your responsibility.

When you have scholarships (whether stipend support, tuition support, fee support, etc) credit directly to your student account, you may end up having a positive balance in your student account. This will trigger a refund to you when all other charges on your student account are paid in full. This funding will then be issued to you within 3-5 business days as a direct deposit if already setup with OSU, or as a physical check sent to the current mailing address on file.

To set up direct deposit authorization for either/both your student account and business account, visit: <https://fa.oregonstate.edu/business-affairs/direct-deposit-sign-up>

E. Tax Documentation/Reporting

Noncitizen scholarships and fellowships

For students considered to be of noncitizen status, please visit the Finance and Administration's [Scholarships and Fellowships webpage](#).

All other students for scholarships and fellowships

OSU does not withhold tax from the stipend. For the current and upcoming tax years, fellows should contact accounts.payable@oregonstate.edu after February 1, 2023 to obtain the amount for tax reporting in the 2022 tax year. Fellows are responsible for seeking external guidance on tax liability for stipend payments. It is up to the fellow to report this on their tax returns.

Fellows are encouraged to contact the IRS or a tax accountant for guidance concerning their liability. OSU employees are prohibited from offering any tax advice. Students are responsible for reporting these payments and remitting any tax due with their personal income tax return at the end of the year on Form 1040 and the corresponding state forms.

See IRS Publication 970: <http://www.irs.gov/pub/irs-pdf/p970.pdf>. How you report any taxable scholarship or fellowship grant income depends on which return you file.

- **Form 1040 or 1040-SR.** If you file Form 1040 or 1040-SR, include the taxable amount in the total on line 1. If the taxable amount was not reported on Form W-2, also enter "SCH" and the taxable amount on the dotted line next to line 1.
- **Form 1040-NR.** If you file Form 1040-NR, report the taxable amount on line 1b. Generally, you must report the amount shown in box 2 of Form(s) 1042-S, Foreign Person's U.S. Source Income Subject to Withholding. See the Instructions for Form 1040-NR for more information.

VII. Helpful Contacts

1. Academic Unit/College Contacts

Your academic program is the best place to get started with questions related to:

- Identifying fellowship opportunities and what will qualify as an OSU-appointed fellowship
- Setting up fellowship appointment
- Generating the letter of offer for fellowship appointment
- Requesting tuition support, either from college/program or from Graduate School
- Seeking out other funding opportunities
- Maintaining academic progress for continued fellowship appointment

To determine contacts within your academic program, visit

<https://gradschool.oregonstate.edu/programs> and click on your current/intended academic program. Each page will either link to your Graduate Program's contact page and will include a primary contact as a graduate advisor, academic program coordinator, program lead, or primary contact. We recommend reaching out to the listed person/email first.

2. Research Office (OSRAA)

Your academic program will communicate directly with the Research Office on appointment procedures. The main office that handles fellowship procedures is the [Office for Sponsored Research and Award Administration \(OSRAA\)](#).

Be sure to work with your department with any supporting documentation needed to verify the award you received is a fellowship. Graduate fellows should not contact OSRAA directly, as their responsibility is to make sure a fund is setup correctly and can be used to provide funding for a graduate fellowship appointment, if the fund is administered by Oregon State University.

3. Business Affairs

Business Affairs with OSU's Finance and Administration handles a number responsibilities related to fiscal and policy decisions. As an appointed graduate fellow, there are three units that may be helpful to contact:

- For monthly stipend payments, and tuition/fee/health insurance premium support provided by the external fellowship:
fellowshippayments@oregonstate.edu – Benny Garcia – 541-737-0642
- For external awards paying tuition on your behalf:
thirdpartybilling@oregonstate.edu – [WEBSITE](#) – 541-737-3775
- For tax reporting information related to stipends/awards:
accounts.payable@oregonstate.edu – [WEBSITE](#) – 541-737-0637

4. Graduate School

The Graduate School's team working with recruitment and financial support handles much of the administration, policies, and procedures related to fellowship appointment. They can serve as a resource in the following areas:

- Providing the current status of fellowship appointment process
- Confirming funding sources included with fellowship appointment
- Interpreting outside award for fellowship appointment eligibility
- Guiding responsibilities and logistics when on appointment
- Knowing the type of fellowship appointment and who to contact for troubleshooting payment issues
- Orienting you on the types of graduate appointments at OSU
- Seeking funding opportunities within the Graduate School's annual award process

Two individuals work closely on fellowship awards within the Graduate School, in addition to scholarships/awards administration. You can email them both at graduate.scholarships@oregonstate.edu:

For all fellowship/award questions:

Nick Fleury

Director of Financial Support

nick.fleury@oregonstate.edu

541-737-0450

5. Human Resources

Human Resources at Oregon State University handles the final setup of the fellowship appointment with the HR Banner system. This creates a formal appointment record within OSU's system, which enables fellowship appointment benefits, including resident [tuition rates](#) charges for course enrollment during the duration of your fellowship regardless of Oregon residency status, and access to the [Graduate Fellow Health Insurance](#) plan.

Final set up of the appointment takes place in the HR Support Services:

hrsupportservices@oregonstate.edu

HR Support Specialist: Emma Bramwell

541-737-3133

If you have any questions related to setup of your fellowship health insurance, including mandatory enrollment, opt-out, adding dependents, or acquiring insurance over the summer when not on appointment:

gradhealth@oregonstate.edu

Consultant: Melody Larson

541-737-7568

APPENDIX A – Fellowship Setup and Administration

1. Mechanisms to Fund Graduate Fellowships

OSU funds, Foundation funds

Institutional graduate fellowships are typically sponsored through donations made to the OSU Foundation or through other authorized funds designated by the Provost for strategic purposes. These internally-funded graduate fellowships typically provide a stipend to contribute support for the recipient's living expenses. Allowances for education and/or research are commonly not included. Stipends that meet a minimum level for appointment are eligible to receive tuition support through the Graduate School's tuition waiver support programs. Your academic unit will make this tuition support request annually on your behalf, provided you are appointed to a qualified fellowship.

External/Training

Predoctoral fellowships

Most federally-sponsored predoctoral fellowships are awarded under a national competition on the basis of a student's intellectual merit and the potential that the student and the proposed research may have for creating positive societal impacts. Predoctoral fellowships are typically portable, meaning the recipient may choose the educational institution and graduate program for which the fellowship will be utilized. Predoctoral fellowships typically provide multiple years of funding at nationally competitive rates to fully support the educational and living expenses of recipients in the early stages of their graduate programs. Most include direct cost of attendance support (in part or full) to your home institution (called an educational allowance), in addition to the fellowship stipend. Select predoctoral fellowships may also provide a research allowance.

Dissertation fellowships

In contrast, dissertation fellowships typically provide only a stipend for living expenses and are intended for students who will complete the writing phase of the dissertation during a one-year award period. Dissertation fellowships rarely include educational allowances recognizing the recipient is in the advanced stage of doctoral training with most, if not all, course work completed.

Traineeships

Traineeships are offered under training grants secured by institutional faculty for the purpose of developing the next generation of disciplinary and/or multidisciplinary experts who will become leaders and innovators in their professional careers. Like predoctoral fellowships, traineeships provide a competitive stipend and cost of education allowance. In addition, some may provide research allowances, internship opportunities, and international research experiences. A primary distinction between graduate traineeships and predoctoral fellowships is that the principal investigator(s) select the students who will participate in the advanced training program.

As with internally-funded fellowships, stipends provided on external/training grants that meet a minimum level for appointment are eligible to receive tuition support through the Graduate

School's tuition waiver support programs. Your academic unit will make this tuition support request annually on your behalf, provided you are appointed to a qualified fellowship.

Other – Alternatively-Funded

Some awards do not meet all requirements to qualify as a fellowship appointment through OSU. In response, OSU developed a program to appoint [Alternatively-Funded Graduate Fellowships](#). These fellows are supported by varying sources to meet minimum stipend and tuition support requirements, as outlined in Graduate Fellowship Policies.

Upon appointment, these alternatively-funded fellows will have tuition charged at the resident rate and will be eligible for the subsidized Graduate Employee Health Plan for the appointed fellow and respective dependents.

Work with your academic unit if you intend to apply or receive an external award. They can assist you to see if it will qualify for tuition support through the Graduate School, or potentially offer other financial assistance to you depending upon the award.

2. Graduate Fellowship Appointment Setup

Appointments are typically set up within the student's academic unit, but may also originate within an administrative or research unit. Fellowships that have funds administered by OSU will normally have documents on file to set these up for the student, requiring no documentation from you to initiate the appointment setup.

For fellowship appointments that do not have funds administered by OSU, the student will be responsible for providing as much documentation as possible about the award, stipend level, tuition support (if any), as well as any requirements to receive the award. From there, the student's academic unit will work with the Graduate School to determine if the award will meet requirements to be set up as an OSU-appointed Graduate Fellowship.

a. Letter of offer

The letter of offer is the first document processed to start an OSU-appointed graduate fellowship. This will originate with either the academic unit of the graduate student or by the administrative/research unit that is managing the fellowship funds.

Letters are usually signed on behalf of the department head, research unit head, or the principal investigator (PI) for the fellowship funds as determined by OSU. Some fellows will be considered principal investigators from the external granting agency, but OSU policy only allows faculty members to be PIs on a funding index.

See Appendix B for the template letter of offer for all fellowship appointments.

b. Tuition/stipend offer/top-up funding

OSU-appointed fellowships require a minimum stipend level for appointment, which is currently the equivalent of \$2040 per month for the 2022-2023 academic year. If a unit wishes

to have a student on an appointment, they may be required to provide a supplemental scholarship as a 'top-up' to meet this minimum rate.

Furthermore, some fellowships may not have confirmed tuition support from the external award, the Graduate School, or from another internal OSU source. In these cases, tuition support may be provided, in-part or in-full, as a top-up scholarship from the unit.

Top-up stipend and/or tuition scholarships are typically provided only during the duration of the fellowship appointment. If at any time the external fellowship award is no longer supporting the student, these top-up funds for tuition and/or stipend are no longer available as support.

Templates for top-up funding can be found at:

<https://gradschool.oregonstate.edu/finance/graduate-fellowships-and-scholarships/graduate-fellow-offer-and-renewal-letters>

c. Fellowship Appointment Form

The fellowship appointment form is the official Human Resources record of the OSU fellowship appointment. This form indicates the student fellow details, including home academic unit, organization unit for the fellowship, and citizenship status details, which aid in determining any tax withholding requirements.

Fellowships using OSU Foundation accounts and internal OSU funding require review by the appointing department, the Graduate School, and the Human Resources Lifecycle unit.

Fellowships from external grants administered by OSU require verification by OSRAA (OSU's research office) to confirm the funding index was set up to provide support for a graduate fellowship. Business Affairs must also review the material to set up payments necessary to the student's business account, which can include monthly stipends, tuition support, and in some cases, fee + health insurance premium support. These forms also require review by the appointing department, the Graduate School, and the Human Resources Lifecycle unit, as is in the case for OSU-internal appointments.

Fellowships paid directly to the student will also require review by the appointing department, the Graduate School, and the Human Resources Lifecycle unit, but review by OSRAA and Business Affairs depends upon the type and level of external support and how it is administered.

When the fellowship form is routed to each approving entity, it will be accompanied by the fellowship letter of offer, top-up letters for stipends and/or tuition (if applicable), and other supporting documentation about the award not already on file.

The last entity to sign each form is the HR Support Services Team.

d. HR Record, i.e. C97XXX

Once all entities review the OSU-appointment fellowship paperwork, the fellowship will get set up within OSU's system. This creates a 100% appointment position within the system (called a Banner HR record) with a position number C97XXX. The 'XXX' will depend upon the appointing academic or administrative unit, so fellows appointed by the same unit will have the same position number.

Once this position number is attached to the student's record, it qualifies the student to have [resident tuition rates](#) charged to the student account, regardless of Oregon Residency status. It also alerts HR that the student will qualify for [Graduate Fellow Health Insurance](#), and it will require the student to enroll in the insurance or opt-out after verifying a comparable plan.

If your fellowship has not been set up by HR, you may see momentary charges at a different rate, based upon your residency status. Once your HR record is updated with your fellowship appointment, tuition rates will be adjusted accordingly. This process usually takes 2-3 business days upon setup of your appointment.

OSU-appointed fellowships are considered to be a 100% appointment within the Banner HR record. As a result, all OSU-appointed fellowship cannot simultaneously have another appointed position at OSU. This includes an assistantship, student employment, or staff/faculty position. For the duration of the dates of the fellowship appointment, no other position can be occupied by the student at OSU.

e. Appointment Termination

An appointed graduate fellowship requires full-time effort for the fellowship requirements, satisfactory progress in your academic program, minimum enrollment requirements, as well as continued sponsorship under the fellowship award.

If any of these requirements are not met, your appointment must be terminated within the OSU HR system. This will mean forfeiture of stipends, tuition support, and any other benefits provided as part of your fellowship award. Please maintain contact with your academic unit with changes to your fellowship award or academic progress.

A [Leave of Absence](#) is certainly a possibility for many fellows due to unique personal circumstances. While on a leave of absence, you cannot maintain your fellowship appointment. Eligibility for re-appointment or deferment of the fellowship appointment will largely depend upon the terms of your award. Fellowships administered by OSU have greater flexibility in offering deferment, but may be one-time awards. External fellowships typically cannot permit deferment, but you will need to check with external entity responsible for the award to determine future eligibility.

Since stipends and tuition support are largely provided in-advance, you may be responsible for repayment of these amounts if your fellowship appointment is terminated. Whenever possible, please alert your academic unit and graduate.scholarships@oregonstate.edu a month in advance due to degree completion, an expected leave of absence, or loss of continued sponsorship on your fellowship award.

APPENDIX B – Appointment Forms/Templates

Letter of offer template – quarterly (term) stipends



Department or Unit Name
Oregon State University
Address Goes Here
Corvallis, Oregon 97331

P 541-737-[XXXX]
F 541-737-[XXXX]
[website].oregonstate.edu

(PLEASE COPY, REVISE AND PRINT ON YOUR DEPARTMENT LETTERHEAD)

**USE THIS MODEL LETTER FOR 2022-2023 ACADEMIC YEAR
OSU + FOUNDATION FELLOWSHIPS ONLY**

[Date]

Dear [Student]:

Congratulations on your selection as a 2022-2023 [Name of Graduate Fellowship] graduate fellow. This letter serves as your formal notice of appointment as a Graduate Fellow at Oregon State University. On behalf of the [Graduate Committee or other decision-maker] of the [Graduate Program] I am pleased to offer you an OSU Graduate Fellowship beginning on [Begin Date] and ending on [End Date].

The [Name of Graduate Fellowship] fellowship provides a total stipend of \$(Amount) which will be distributed to you in quarterly installments at the beginning of each academic term for the following terms of appointment: [select terms – summer, fall, winter, spring.] This fellowship is contingent upon your formal acceptance as a graduate degree-seeking student by OSU's Graduate School, your continued status as a graduate degree-seeking student in good standing as determined by the Graduate School and your program in the field of [Graduate Major], and your continued sponsorship under the [Name of Graduate Fellowship] program.

Contact the appointing graduate program if you have questions regarding this fellowship support.

If this fellowship includes tuition waiver scholarship support from the OSU Graduate School, a letter of offer detailing that tuition waiver support will be sent to you separately by the OSU Graduate School.

Graduate Fellows are not employees of the university or department/unit. However, through their advanced degree objectives, Graduate Fellows are mentored by Graduate Faculty members. Activities associated with Graduate Fellowships are not employment.

If this notice is understood and acceptable to you, please sign one copy of this memorandum and return a copy to [Department], no later than [Date]. A copy will be placed in your department file and a copy will be sent to the Human Resources Support Services unit as an official record of your fellowship. Please keep the original copy for your own records. Health insurance forms should be returned directly to the Office of Human Resources Graduate Benefits.

Once again, congratulations on your selection as a [Name of Graduate Fellowship] fellow and your appointment as a Graduate Fellow. Please do not hesitate to let us know how we can support you in your success.

Sincerely,

[Dean, Department Head/Chair, Graduate Program Director, or Principal Investigator]

cc: Office of Human Resources Support Services Unit
[Dean, Department Head/Chair, Graduate Program Director]

[Date]

[Graduate Fellow's Name]

Letter of Offer and Notice of Graduate Fellowship for 2022-2023

[or appropriate term dates** if less than the fiscal year]

Name of Fellowship Program or Training Grant

Acceptance and Consent (Please review details about these requirements prior to signing this letter)

I accept this offer of appointment to a Graduate Fellowship, and I further acknowledge:

1. I must maintain a minimum of twelve credit hours toward my degree program throughout my fellowship period during the academic year. If I have a summer appointment, I must maintain a minimum of three credit hours during the summer term. I understand that audit registrations, course withdrawals, and enrollment in INTO OSU coursework may not be used to satisfy the twelve credit enrollment requirement.
2. Tuition charges associated with INTO OSU or tuition charges associated with audit or withdrawn courses may not be paid by a Graduate Fellow tuition waiver.
3. If allowable within your program requirements, E-campus courses may be used to satisfy the twelve credit enrollment requirement, and E-campus tuition charges are covered by the tuition waiver up to a maximum enrollment of 12-credits.
4. If I am also receiving tuition support from OSU during the period of my fellowship, a minimum enrollment of 12-credits is required each term during the academic year, 3-credits in summer term. Tuition waivers cover the cost for a maximum of 12-credits of enrollment during the academic year and a maximum of 3-credits of enrollment in summer term. Any additional cost for more than 12-credits in academic year terms or more than 3-credits in summer term will not be paid by the waiver; if I choose to take more than 12-credits in academic year terms or 3-credits in summer term, I am personally responsible for paying the additional cost.
5. Failure to make satisfactory progress toward my degree will result in the removal of this fellowship.
6. Health insurance is mandatory for Graduate Fellows. Graduate Fellows will automatically be enrolled in fellow-only health insurance. I need to submit a health insurance enrollment form to add dependent coverage within the first 30 days of my Graduate Fellowship start date. I may waive University-provided health insurance only if I have group coverage that is equal or superior to the university plan (medical, vision, and dental). I authorize the University to post a monthly health premium charge to my student account for the level of coverage for which I have enrolled. For additional information visit <https://hr.oregonstate.edu/graduate-student-insurance-plans/graduate-fellow-insurance-plan>, call 541-737-7568, or send an email to gradhealth@oregonstate.edu.

Timing of your Offer Acceptance

Oregon State University is a participant in the Council of Graduate Schools (CGS) Resolution for Graduate Scholars, Fellows, Trainees and Assistants (also known as the *April 15th Resolution*), located here: <http://cgsnet.org/april-15-resolution>. We seek your assistance in complying with its terms. Please read the Resolution carefully while considering your offer of fellowship. *Your acceptance of this offer is not valid or effective until April 15 of the year in which your fellowship will begin.*

I accept the offer as outlined in this letter.

Graduate Fellow's Signature

Date

University ID Number

cc: Office of Human Resources Support Services Unit

[Dean, Department Head/Chair, Graduate Program Director]

Letter of offer template – monthly stipends



Department or Unit Name
Oregon State University
Address Goes Here
Corvallis, Oregon 97331

P 541-737-[XXXX]
F 541-737-[XXXX]
[website].oregonstate.edu

(PLEASE COPY, REVISE AND PRINT ON YOUR DEPARTMENT LETTERHEAD)

USE THIS MODEL LETTER FOR 2022-2023 ACADEMIC YEAR EXTERNAL + TRAINING GRANT FELLOWSHIPS ONLY

[Date]

Dear [Student]:

Congratulations on your selection as a 2022-2023 [Name of Graduate Fellowship] graduate fellow. This letter serves as your formal notice of appointment as a Graduate Fellow at Oregon State University. As [Principal Investigator/Major Advisor/Coordinating Official] of the [Name of Fellowship Program or Training Grant], I am pleased to offer you an OSU Graduate Fellowship beginning on [Begin Date] and ending on [End Date].

The [Name of Graduate Fellowship] fellowship provides a total stipend of \$[Amount] which will be disbursed in [Number of Payments] monthly payments of \$[Amount] each on or before the first of the upcoming month during the fellowship award period. If you have an appointment that is for part of the month, your payment will be pro-rated. This fellowship is contingent upon your formal acceptance as a graduate degree-seeking student by OSU's Graduate School, your continued status as a graduate degree-seeking student in good standing as determined by the Graduate School and your program in the field of [Graduate Major], and your continued sponsorship under the [Name of Graduate Fellowship] program.

Contact the appointing graduate program if you have questions regarding this fellowship support.

If this fellowship includes tuition waiver scholarship support from the OSU Graduate School, a letter of offer detailing that tuition waiver support will be sent to you separately by the OSU Graduate School.

Graduate Fellows are not employees of the university or department/unit. However, through their advanced degree objectives, Graduate Fellows are mentored by Graduate Faculty members. Activities associated with Graduate Fellowships are not employment.

If this notice is understood and acceptable to you, please sign one copy of this memorandum and return a copy to [Department], no later than [Date]. A copy will be placed in your department file and a copy will be sent to the Human Resources Support Services unit as an official record of your fellowship. Please keep the original copy for your own records. Health insurance forms should be returned directly to the Office of Human Resources Graduate Benefits.

Once again, congratulations on your selection as a [Name of Graduate Fellowship] fellow and your appointment as a Graduate Fellow. Please do not hesitate to let us know how we can support you in your success.

Sincerely,

[Dean, Department Head/Chair, Graduate Program Director, or Principal Investigator]

cc: Office of Human Resources Support Services Unit
[Dean, Department Head/Chair, Graduate Program Director]

[Date]

[Graduate Fellow's Name]

Letter of Offer and Notice of Graduate Fellowship for 2022-2023

[or appropriate term dates** if less than the fiscal year]

Name of Fellowship Program or Training Grant

Acceptance and Consent (Please review details about these requirements prior to signing this letter)

I accept this offer of appointment to a Graduate Fellowship, and I further acknowledge:

1. I must maintain a minimum of twelve credit hours toward my degree program throughout my fellowship period during the academic year. If I have a summer appointment, I must maintain a minimum of three credit hours during the summer term. I understand that audit registrations, course withdrawals, and enrollment in INTO OSU coursework may not be used to satisfy the twelve credit enrollment requirement.
2. Tuition charges associated with INTO OSU or tuition charges associated with audit or withdrawn courses may not be paid by a Graduate Fellow tuition waiver.
3. If allowable within your program requirements, E-campus courses may be used to satisfy the twelve credit enrollment requirement, and E-campus tuition charges are covered by the tuition waiver up to a maximum enrollment of 12-credits.
4. If I am also receiving tuition support from OSU during the period of my fellowship, a minimum enrollment of 12-credits is required each term during the academic year, 3-credits in summer term. Tuition waivers cover the cost for a maximum of 12-credits of enrollment during the academic year and a maximum of 3-credits of enrollment in summer term. Any additional cost for more than 12-credits in academic year terms or more than 3-credits in summer term will not be paid by the waiver; if I choose to take more than 12-credits in academic year terms or 3-credits in summer term, I am personally responsible for paying the additional cost.
5. Failure to make satisfactory progress toward my degree will result in the removal of this fellowship.
6. Health insurance is mandatory for Graduate Fellows. Graduate Fellows will automatically be enrolled in fellow-only health insurance. I need to submit a health insurance enrollment form to add dependent coverage within the first 30 days of my Graduate Fellowship start date. I may waive University-provided health insurance only if I have group coverage that is equal or superior to the university plan (medical, vision, and dental). I authorize the University to post a monthly health premium charge to my student account for the level of coverage for which I have enrolled. For additional information visit <https://hr.oregonstate.edu/graduate-student-insurance-plans/graduate-fellow-insurance-plan>, call 541-737-7568, or send an email to gradhealth@oregonstate.edu.

Timing of your Offer Acceptance

Oregon State University is a participant in the Council of Graduate Schools (CGS) Resolution for Graduate Scholars, Fellows, Trainees and Assistants (also known as the *April 15th Resolution*), located here: <http://cgsnet.org/april-15-resolution>. We seek your assistance in complying with its terms. Please read the Resolution carefully while considering your offer of fellowship. *Your acceptance of this offer is not valid or effective until April 15 of the year in which your fellowship will begin.*

I accept the offer as outlined in this letter.

Graduate Fellow's Signature

Date

University ID Number

cc: Office of Human Resources Support Services Unit

[Dean, Department Head/Chair, Graduate Program Director]

Fellowship appointment forms



Graduate School and
Office of Human Resources

Graduate Fellow Appointment Form OSU + Foundation Fellowships

Section I -- Appointee Information - to be completed by department

Revised 04/27/2022

Last Name		First Name		Middle Name	
University ID		Home Organization Number/Description		Department Contact-Name/Phone	
Citizenship Status:		Timesheet Organization/Number/Description		Appt Org Business Center:	
<input type="checkbox"/> U.S. Citizen <input type="checkbox"/> Permanent Resident or Substantial Presence Alien <input type="checkbox"/> Nonresident Alien					
C97	00	XX	Graduate Fellow	None	Fellow
Position	Suffix	ECLS	Job Title	Faculty Status	Faculty Rank Type
<input type="checkbox"/> Original Appointment <input type="checkbox"/> Appointment renewal <input type="checkbox"/> End Appointment		Begin Date	End Date	(Visa Type/Expiration Date)	
		Begin Date	End Date	Fixed Term	
		End Date	End Reason	Tenure Status	

Section II - For Institutionally-Funded Fellowship Only-to be completed by department

Stipend Funding Source:

☐ OSU Foundation Fellowship:

OSU Foundation Award Name		OSU Foundation Project ID/Detail Code	
Quarterly Fellowship Stipend:	(Specify Terms):	<input type="checkbox"/> Summer	<input type="checkbox"/> Fall <input type="checkbox"/> Winter <input type="checkbox"/> Spring
Total Annual Fellowship Stipend:	Summer Stipend (if different):		

☐ Other Institutional Fellowship:

Award Program Name		Fund Type		Index/Detail Code	
Quarterly Fellowship Stipend:	(Specify Terms):	<input type="checkbox"/> Summer	<input type="checkbox"/> Fall <input type="checkbox"/> Winter <input type="checkbox"/> Spring		
Total Annual Fellowship Stipend:	Summer Stipend (if different):				

Tuition Support Source:

Graduate School Tuition Support Confirmed?: ☐ Yes ☐ No (Specify Terms) ☐ Fall ☐ Winter ☐ Spring

Detail Code

Summer Tuition Support Confirmed?: ☐ Yes ☐ No

(Specify Source): ☐ Included in Stipend ☐ Provided by Grad School ☐ Other:

Section III -- Approvals / Signatures

Department Head/Chair Signature	Printed Name	Date	Phone
Graduate School (all forms)	Printed Name	Date	Phone
Business Center/Office of Human Resources	Printed Name	Date	Phone
Submitted by: Name	Phone	Date	



Graduate School and
Office of Human Resources

Graduate Fellow Appointment Form Training Grant/External Fellowship

Section I -- Appointee Information - to be completed by department

Revised 03/10/2022

Last Name		First Name		Middle Name	
University ID		Home Organization Number/Description		Department Contact Name/Phone	
Citizenship Status:		Timesheet Organization Number/Description		Appt Org Business Center:	
<input type="checkbox"/> U.S. Citizen		<input type="checkbox"/> Permanent Resident or Substantial Presence Alien		<input type="checkbox"/> Nonresident Alien	
C97	00	XX	Graduate Fellow	None	Fellow
Position	Suffix	ECLS	Job Title	Faculty Status	Faculty Rank Type
<input type="checkbox"/> Original Appointment			Begin Date	End Date	(Visa Type/Expiration Date)
<input type="checkbox"/> Appointment renewal			Begin Date	End Date	Fixed Term
<input type="checkbox"/> End Appointment			End Date	End Reason	Tenure Status

Section II -- External Award/Training Grant Information - to be completed by appointing unit

Funding Source: _____ Stipend Administered by OSU? ☐ Yes ☐ No
Sponsoring Agency: _____

Fellowship Type (choose only one): _____
Training Grant/Externally-funded Award - Principal Investigator & Index: _____
Individual Fellowship - Fellow's Major Professor & OSU Index (if available): _____

Monthly Fellowship Stipend: _____ Total Fellowship Stipend: _____

Tuition paid by:
Grant Index ☐ No ☐ Yes - (Specify Terms:) ☐ Summer ☐ Fall ☐ Winter ☐ Spring Amount per term: _____
Graduate School ☐ No ☐ Yes - (Specify Terms:) ☐ Fall ☐ Winter ☐ Spring ☐ Full ☐ Top-Up
Other (Specify source, terms, amount):
Third Party Billing ☐ No ☐ Yes
Tuition Funding Confirmed ☐ No ☐ Yes

Fees covered: ☐ No ☐ Yes
☐ Summer ☐ Fall ☐ Winter ☐ Spring
Source: ☐ Grant Index ☐ Other _____

University Allowance _____
Student Allowance _____

Is fellow receiving other federal money?
☐ No
☐ Yes - specify source & amount: _____

Section III -- Approvals / Signatures

Department Head/Chair Signature	Printed Name	Date	Phone
Office for Sponsored Research and Award Administration (OSRAA)	Printed Name	Date	Phone
Office of Business Affairs- Student Account Services	Printed Name	Date	Phone
Graduate School	Printed Name	Date	Phone
Office of Human Resources - Lifecycle Unit	Printed Name	Date	Phone