



Oregon State University Graduate School

Graduate School

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[REDACTED]
To:

From: Nick Fleury, Director of Financial Support
Graduate School

Re: NSF Graduate Research Fellowship for 2022-2023 – Administration Guidelines

The following outlines how your 2022-2023 NSF Graduate Research Fellowship will be administered. **A few things have changed this year - please review these guidelines carefully.**

Appointment Procedures

- Based on your status as an NSF Graduate Research Fellow, you will be appointed as an OSU Graduate Fellow for this NSF-GRFP appointment year. Specifics on this appointment are in your Graduate Fellowship Offer Letter. These were sent via DocuSign in May 2022.
- Be sure you updated your current mailing address with OSU to ensure proper disbursement of your stipend payment check. Payments are provided directly to you rather than through your student account.
- Information regarding Direct Deposit of stipends and reimbursements:
 - You may elect to have future stipend and reimbursement payments Direct Deposited. For a Direct Deposit option go to: <https://fa.oregonstate.edu/external-fellowships> or contact your Business Center.
 - If you are a returning fellow and already have Direct Deposit, your checks will continue to be deposited automatically.
 - If you have any questions about Direct Deposit, consult Sandi Larsen at sandra.larsen@oregonstate.edu.

Fellowship Details

[OSU Graduate Fellowships](#) are appointed to OSU as a means to acknowledge and support outstanding graduate students in pursuit of their advanced degree objectives. NSF-GRFP fellowships provide a living stipend, full graduate fellow health insurance coverage, and tuition support, and also include support for mandatory fees. OSU has no commensurate service requirement for any fellowship appointments. Graduate Fellows are not employees of OSU, and appointments are not governed by contractual bodies. However, 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.

Your NSF Fellowship provides you the following:

- An **annual stipend** of \$34,000 disbursed in installments of \$2833.33 on or before the first of the upcoming month, provided you are registered for the required number of credits. As your appointments begins on the 16th of the month, the first and last month of your fellowship will be ½ payments, ~\$1416.70.
- A **tuition waiver and fee relief** scholarship to cover the cost for tuition and mandatory fees, for required enrollment of 12 credits each term in the academic year (fall, winter and spring) and 3 credits in summer term. Your tuition scholarship covers the cost for a maximum of 12 credits each academic term (up to 16cr if a tuition plateau is in effect for your program and taking all Corvallis-campus credits) and a maximum of 3 credits during summer term. You must be registered for the required 12 credits each academic term and 3 credits in summer term for your NSF-GRFP tuition waiver and stipends to be paid. You will be personally responsible for any tuition/fee costs resulting from enrollment beyond the required enrollment level each term.
- Coverage for out-of-pocket charges for **fellow-only health insurance** coverage, referred to as fellow-only premium. Details of your health insurance plan are explained in your Graduate Fellowship offer letter issued via DocuSign – contact Human Resources as indicated in the letter if you have any questions.
- A **Research Expense Allowance** in the amount of \$946 which will be deposited in [REDACTED] (an institutional index) for your use. This funding is available to support your research and/or professional development activities (as well as dependent health insurance coverage if you choose - contact Benny Garcia at fellowshippayments@oregonstate.edu to get dependent coverage charges set up). Balances may be carried over from one fellowship year to the next; however, the total balance must be used by the end of your third year (36th month) of active tenure, the date you obtain your degree or are no longer an OSU graduate student, or at a date mandated by NSF, whichever is sooner. At the end of this fellowship appointment, you will have used **24 months** of your total active tenure. *You are responsible for monitoring expenditures in this 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.* If you have questions about your balance in this index or expense reimbursement process, contact Sandi Larsen at sandra.larsen@oregonstate.edu.

Enrollment Requirements

Academic Year: NSF Graduate Research Fellows must maintain a minimum registration level of 12 credits each term during the academic year (fall, winter, spring) to remain eligible for the Tuition Scholarship disbursed by the Graduate School. Your tuition scholarship will credit to your student account on or immediately prior to the beginning of the term. Your term fees will be covered via funding from NSF, typically credited to your student account one month into the academic term.

Summer Session: NSF Graduate Research Fellows must maintain a minimum registration of 3 graduate credits during summer session. Summer tuition + fees is covered via funding from NSF, typically credited to your student account in mid-July.

Supplementation

NSF specifies that fellows may not take on additional employment. OSU policy also prohibits any fellow from being employed in any capacity at OSU while on appointment. Fellows who wish to teach or to receive support concurrently must seek prior approval from the OSU Coordinating Official (Nick Fleury). Fellows seeking graduate assistantship support should plan to do so on a year of reserve status. Questions regarding employment (including GRA, GTA, and student hourly wage appointments) should be made via email to the Coordinating Official in the Graduate School prior to accepting the employment offer. In some cases, NSF approval will also be required.

Stipend Payments

For questions regarding stipend payments, contact:

Benny Garcia
Student Account Services, Business Affairs
Email: fellowshippayments@oregonstate.edu
Phone: (541) 737-3775

Stipend payments are typically paid on or before the first of the month, provided you are enrolled for the required number of credits at that time. January 2023 will be issued just after the first of the month due to the change in the calendar year, as the stipend must be credited in 2023. Please be sure you are registered for the required credits during priority registration or your payment may be delayed.

Purchases and Reimbursements using Research Allowance

NSF Fellows will use the same business center (UABC) for purchases and reimbursement requests paid from the Research Allowance.

For personal and travel reimbursement requests and submissions, contact:

Sandi Larsen
Grants & Contracts Coordinator - UABC
Email: sandra.larsen@oregonstate.edu
Phone: (541) 737-0916

Your NEW Research Allowance Index is [REDACTED]. All reimbursements must be preapproved by your supervising professor in order to be accepted for payment. All expenditures must follow OSU policies and regulations. You can use funds from either or both of your research allowance indexes to make purchases, if funding remains in your OLD index. We highly recommend spending funding from your OLD index first and then start using the NEW index.

For purchases using your index valued under \$1,000, work with your home department using the index(es) provided above. Purchases for one item valued at \$1,000 or more or any computer purchases require prior approval from the NSF Coordinating Official (Nick Fleury). Requests must be submitted via email and contain the following information:

1. need for the expense and appropriateness to degree program,
2. endorsement from major professor, and
3. proposed disposition of equipment upon completion of degree program.

Reporting Requirements

NSF Graduate Research Fellows must submit an annual activities report to NSF each year. The activities report is required of all fellows, whether on tenure, reserve, or any other status and are of particular importance for fellows who are finishing the third year of support as they are the ones most likely to have reached advanced levels of accomplishment. These reports are typically due no later than May 1.

Tenure declarations must be submitted through NSF Fastlane each year no later than May 1. Note that your annual activities report must be completed before you will be permitted to submit a tenure request.

It is your responsibility to know and understand the reporting requirements of your NSF Fellowship. Please be sure to respond to emails from NSF, provide necessary reports and meet all deadlines. Check Fastlane periodically to make sure you are in compliance with your fellowship requirements.

Responsible Conduct of Research Program (RCR)

The National Science Foundation requires that all NSF-GRFP Fellows at OSU to participate in both online and face-to-face Responsible Conduct of Research (RCR) training. This training must be completed by the end of your first year of active tenure.

Required online training (at no charge):

- [CITI RCR web course](#) (required; electronic certification) - Log in to citiprogram.org and affiliate with OSU. You must use your OSU email address for the primary and institutional addresses in the CITI registration. Complete the relevant RCR course. Options include: Biomedical, social behavioral, physical science, humanities, and engineering.

Required face-to-face training:

- Complete any of the three courses listed at <https://research.oregonstate.edu/prrp/training-resources>
- Discuss one or more of the ten (listed under [GRAD 520](#)) primary topics of ethics of research with your advisor, or
- Complete other approved in-person research ethics training.

The RCR requirements must be completed by end of your first year of NSF GRFP active tenure. Nick Fleury, the NSF Coordinating Official, will provide further details to fellows in the first year of active tenure regarding the RCR training. Expect an email in early December 2022 with further details. You may also visit the Current Fellows tab on the Graduate School's [National Science Foundation Award](#) page.

Tax Issues

- 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.

OSU's NSF Coordinating Official:

Nick Fleury, Director of Financial Support
Oregon State University Graduate School
Email: nick.fleury@oregonstate.edu
Phone: (541) 737-0450

If you have any questions, please let me know.

PLEASE SIGN below, provide your phone, additional email address, and Faculty Advisor information, by Friday, September 30, 2022.

I have reviewed the NSF Graduate Research Fellows Administration Guidelines.

Signature – [REDACTED] Date _____

Please provide your phone number and non-OSU email address:

Phone

Non-OSU Email Address

Please provide the name, title and email address of your Faculty Advisor:

Name

Title

Email Address