To: NSF-GRFP Fellow

From: Nick Fleury, Director of Financial Support
Graduate School

Re: NSF Graduate Research Fellowship for 2019-20 – Administration Guidelines

The following outlines how your 2019-20 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 GRF appointment year. Specifics on this appointment are in your Graduate Fellowship Offer Letter.
• You must provide a mailing address for your stipend payment check - see bottom of this memorandum.
• Information regarding Direct Deposit of stipends and reimbursements:
  o 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.
  o If you are a returning fellow and already have Direct Deposit, your checks will continue to be deposited automatically.
  o If you have any questions about Direct Deposit, consult Sandi Larsen at sandra.larsen@oregonstate.edu.

Fellowship Details
Your NSF Fellowship provides you the following:
• An annual stipend of $34,000 disbursed in installments on or before the first of the upcoming month, provided you are registered for the required number of credits.
• 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 16 if a tuition plateau is in effect for your program) 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. Details of your health insurance plan are explained in your Graduate Fellowship offer letter – contact Student Health Services as indicated in the letter if you have any questions.
A Research Expense Allowance in the amount of $XXXX which will be deposited in XXXXXX (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. 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.

**Summer Session:** NSF Graduate Research Fellows must maintain a minimum registration of 3 graduate credits during summer session.

**Supplementation**

NSF specifies that fellows may not take on additional employment. Fellows who wish to teach or to receive support concurrently must seek prior approval from the OSU Coordinating Official (Nick Fleury). Typically, fellows seeking graduate assistantship support plan to do so on a year of reserve status. Questions regarding employment (including GRA, GTA, and student hourly wage appointments) should be made in writing via email to your 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
  Fiscal Coordinator, Business Affairs
  Email: fellowshippayments@oregonstate.edu
  Phone: (541) 737-3775

Stipend payments are paid on the first of the month, provided you are enrolled for the required number of credits at that time. Please be sure you are registered for the required credits at least two weeks prior to the first of every month or your payment will 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
  University Administration Business Center
  Email: sandra.larsen@oregonstate.edu
  Phone: (541) 737-0916
Your Research Allowance Index is XXXXXX. All reimbursements must be preapproved by your supervising professor 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 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 for the subsequent year.

*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)**

Required Web-based training (at no charge) via OSU computer -
- CITI RCR web course (required; electronic certification)
- CITI RCR located at [http://research.oregonstate.edu/ori/responsible-conduct-research](http://research.oregonstate.edu/ori/responsible-conduct-research)
- Must be completed by end of your first year of NSF GRFP active tenure

**Tax Issues**

- OSU does not withhold tax from the stipend. It is up to the fellow to report this on their tax returns. Contact Accounts Payable at OSU to determine how much is considered income for tax purpose provided in the form is stipend and/or other support.
- Fellows are encouraged to contact the IRS or a tax accountant for guidance concerning their liability. OSU employees may not offer any tax advice.

**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 mailing address and Faculty Advisor information, then PDF a copy of this page to graduate.scholarships@oregonstate.edu.

I have reviewed the NSF Graduate Research Fellows Administration Guidelines.

__________________________________________________________________________            Date

Signature – NSF-GRFP Fellow

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Mailing Address - Street, City, State, ZIP (please PRINT clearly):

__________________________________________________________________________

Address

__________________________________________________________________________

City            State            Zip

__________________________________________________________________________

Phone

Please provide the name, title and email address of your Faculty Advisor (please PRINT clearly):

__________________________________________________________________________

Name

__________________________________________________________________________          ________________________________

Title                     Email Address