Maintaining Graduate Student Support
Overview of Graduate Student Support

For most graduate students, the graduate school establishes University support at the beginning of each fiscal year. The students receive a contract that indicates what support will be provided by the University. For most students, this includes up to full tuition, and some combination of fellowship stipend and appointments as assistants in instruction or research. Each department can add and change support distributions for their graduate students using the Graduate Student Support Summary page, and the pages linked from there.

The data you enter in Labor Accounting determines what payments will be made to the students, and which project/grants will be charged for the payments. Once a month, several days before the final payroll is run, the Labor Accounting application sends data to the Payroll system on payments to be made to graduate students. After the payroll is run, Labor Accounting generates journal-voucher transactions from the distribution information and updates the Bookkeeping system.

When students pass their general exams and they have either an Assistant in Instruction or an Assistant in Research appointment, their level of support is raised. Do not enter an adjustment to provide the higher rate; the system automatically creates a new distribution period to reflect the new support level, if necessary.

Graduate student support commitments are distributed across appropriate project/grants within a fiscal year. For graduate students, the fiscal year is divided into two periods, the summer and the academic year. These are the two default distribution periods for graduate student support:

- Summer support—July 1st through August 31st
- Academic year support—September 1st through June 30th

If the support changes during the year, you will need to add a distribution period within one of these default periods to show the change in support. To add a new distribution period, you must specify the beginning date of the period. The new ending date for the previously existing period will be the day before the beginning date of the new period.
You can change the project/grant distributions and add distribution periods during the academic year. If the distribution of a person’s support payments changes during a default period, you must add a new period where you can then distribute the support payments to different department accounts or change the amounts or percentages between project/grants. Adding and deleting periods is done on the pages where support for the different earnings types is entered.

To add a new standard support type for a student, you must use the page for the earnings type to add the new earnings period, and enter either the course(s) and number of hours an Assistant in Instruction is committed to, or the percent of a whole appointment for an Assistant in Research or an Assistant Master. The percent or hours will be charged to the default project/grant set by your department for the earnings type, which you can change if necessary.

**Important!** For tax reasons, you may not transfer stipend support amounts between a fellowship support type and any other support type for a period that includes any part of a previous calendar year. The Graduate School Office will not approve such changes, and Payroll will not accept such changes.

Termination and leave status changes are sent from PeopleSoft Student Administration. If you have already entered these changes, you only need to verify on the Graduate Student Tuition page that the enrollment event is correct and the effective date matches the period you entered in Labor Accounting. If you have not already entered these changes, you can carry them over into Labor Accounting by clicking the Match LA to SA button on the Graduate Student Tuition page. A new period will be added, and the tuition and fees after the termination or leave date will be deleted or adjusted automatically when you click the Match LA to SA button.
## Graduate Student Pages

The pages used to set and change commitments and project/grant distributions for graduate students are all available through links on the Graduate Student Support Summary page. When you click on any of the links, the selected page is displayed, with tabs across the top of the page for all the other Graduate Student pages. The following pages are available for maintaining graduate student support:

<table>
<thead>
<tr>
<th>Link Name</th>
<th>Page Tab Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Tuition &amp; Fees</td>
<td>GS Tuition</td>
<td>Used to pull in Student Administration data and make any adjustments in tuition and fees. You can also add periods and enter enrollment events, such as a leave or termination, on this page.</td>
</tr>
</tbody>
</table>

### External Support

<table>
<thead>
<tr>
<th>Link Name</th>
<th>Page Tab Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sponsored Tuition</td>
<td>Sponsored Tuition</td>
<td>Used to add tuition support from an outside sponsor, usually from the US government and AT&amp;T Labs, that is billed by Student Accounts.</td>
</tr>
<tr>
<td>Tuition Billed</td>
<td>Tuition Billed</td>
<td>Used to add tuition support, usually from foreign governments, private organizations, and individuals, that will be charged to University project/grants and billed to the sponsor by the Graduate School rather than by Princeton Receivables.</td>
</tr>
<tr>
<td>Paid to Student</td>
<td>Paid to Student</td>
<td>Used to add support paid directly to the student by an outside sponsor, to clarify the total amount of support the student is receiving.</td>
</tr>
</tbody>
</table>

### Internal Support

<table>
<thead>
<tr>
<th>Link Name</th>
<th>Page Tab Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Matching Tuition</td>
<td>Other Fellshp</td>
<td>Used to enter a Graduate School fellowship matching the tuition paid by an external fellowship that provides maintenance and partial tuition.</td>
</tr>
<tr>
<td>Adjustable Fellowship</td>
<td>Univ Fellshp</td>
<td>Used to enter University fellowships.</td>
</tr>
<tr>
<td>Non-adjustable Fellowship</td>
<td>Other Fellshp</td>
<td>Used to enter non-adjustable fellowship support, and departmental grants, awards, or prizes.</td>
</tr>
</tbody>
</table>
Overview of Graduate Student Support

Table 2: Graduate Student Pages

<table>
<thead>
<tr>
<th>Link Name</th>
<th>Page Tab Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard AI</td>
<td>Asst Instr</td>
<td>Used to enter summer and academic year AI support commitments and project distributions, including the course(s) the student is teaching, and the number of hours expected for leading a precept, teaching a class, instructing a lab or language lab, and grading.</td>
</tr>
<tr>
<td>AI Adjustment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Standard AR</td>
<td>Asst Research</td>
<td>Used to enter summer and academic year AR support commitments and project distributions.</td>
</tr>
<tr>
<td>AR Adjustment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Standard AM</td>
<td>Asst Master</td>
<td>Used to enter summer and academic year AM support commitments and project distributions.</td>
</tr>
<tr>
<td>AM Adjustment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Summary</td>
<td></td>
<td>Click this tab to return to the Graduate Student Support Summary page.</td>
</tr>
</tbody>
</table>

**Tip!** It generally requires fewer adjustments if you enter the support beginning with the external support and then the internal support, ending with the University Fellowship. It is not necessary to return to the Graduate Student Support Summary page between external support types or between internal support types; you can simply click the page tab for each type of support.
The Graduate Student Support Summary Page

You use the Graduate Student Support Summary page to review and update tuition and stipend distributions for graduate students.

When the Graduate Student Support Summary page is displayed, the distributions shown on this page include any changed distributions that have not been authorized or approved. To see the distributions that are currently in effect when changes are pending, click on the In Eff button at the bottom of the page. This displays a non-editable version of the Graduate Student Support Summary page that shows the distributions currently in effect for the selected individual.

Tip! You can display comments on the changes shown on the Graduate Student Support Summary page by clicking the View Cmt button.

Displaying a Student’s Support Summary

To display a student’s Support Summary page, you must locate the student on the General Browse page, and click the Edit Summary button to display the Graduate Student Support Summary page.

To display a student’s support summary:

1. On the General Browse page, create a current view as described in “Entering Search Criteria to Create the Current View,” on page 28.

   Tip! The more search criteria you use, the smaller the resulting list will be, and the easier it will be to locate the person you want.

2. In the Personnel List on the General Browse page, use the scroll bar, if needed, to locate the person whose commitments you want to see.

3. Click the Edit Summary button on the line that contains the person’s name. The Graduate Student Support Summary page is displayed.

Alternatively, you can work your way through all the records displayed on the Personnel List of the General Browse page by clicking the Next and Prev buttons on the Graduate Student Support Summary page. This is very useful when you are using the General Browse page to display your work list.
What's on the Graduate Student Support Summary Page?

The Graduate Student Support Summary page contains a summary of support data, both stipend and tuition, for one graduate student. At the top left, in the yellow banner, the student’s name, emplID, and department are displayed. Under the student identification, the earnings types for support are listed, by fiscal year.

Depending on your user profile default settings (see “Changing Your User Profile,” on page 21 for information on the user profile), one or more fiscal years may be expanded to show the support and earnings types, or they may all be collapsed. Rows that are collapsed are indicated by a plus mark:

You can click on the plus mark to expand a collapsed row into multiple rows for internal and external support. These rows can be further expanded into rows for each earnings type.

Note: When you click on the plus mark, the display is expanded upward to show the additional data.
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To collapse the rows, click on the minus symbol at the bottom of the expanded rows.

When the support rows are expanded, each support type is a link to a page where you can specify the details about that earnings type, including adding and removing periods, and changing project/grant distributions.

The Graduate Student Support Summary page is divided into three major column groups, one each for Summer Support, Fall Term, and Spring Term. For each term, total amounts are displayed for salary, stipend, and allowances, and for tuition and fees. Totals are displayed for each term, and for the academic year and the fiscal year. The totals are displayed for reference only, and cannot be changed. The Enrollment Status for each term is displayed on the same line as the academic and fiscal year totals.

When the earnings types are expanded, the percent of support is displayed along with the amounts for each earnings type. Unsupported tuition is displayed in red.
You can enter or change data in text boxes on the Graduate Student Support Summary page, or you can click on the links in the first column to enter more detailed changes for a particular earnings type, including adding or removing a distribution period, or changing project/grant distributions.

At the bottom of the page are a series of buttons (you may need to scroll down to see them).

**Copy From**
Use to copy distribution data from the displayed person’s record.

**Copy To**
Use to paste copied data for a selected year into the displayed person’s record.

**View Cmt**
Use to display comments on the displayed person’s record.

**Note:** Contract comments are loaded whenever the system detects new contract data, so you can see the contract comments at any time. You may then choose whether or not to load the contract data for the student.

**Contract**
Use to load the University’s contracted support commitments for the student. See “Copying from the Contract,” on page 109 for more information.
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**Quit Edit**
Use to return to the General Browse page without saving or submitting changes, if any have been made. If you have made changes, a warning will be displayed, giving you the option to continue without saving, or to return to the page and save your changes.

*Important! Do not use the browser’s Back button to return to a previous page. This leaves the record in Edit mode, locking out all other users until either you return to the record or the system resets overnight. If the system resets the record, any changes will be lost.*

**In Eff**
Use to display the distributions currently in effect for the displayed person. To return to the edit page, click the Edit button.

**Calc**
Use to recalculate totals after making changes to distributions or commitments.

**Save**
Use to temporarily save changes without submitting them for approval. The record will be locked to other users for 24 hours. After that, your changes will be lost only if another user makes changes that interfere with your changes.

*Tip! Clicking Save returns you to the browse page.*

**Partial**
Use to approve changes at only your highest authorization level. For example, if you have department and project approval authority, clicking the Partial button will approve at the department level, but not the project level.

*Tip! It is not necessary to save changes before submitting them for approval.*

**Submit**
Use to approve changes at all levels you are authorized for, and submit changes for other approvals.

*Tip! It is not necessary to save changes before submitting them for approval.*

**Disappr**
Use to disapprove changes. You must enter a comment explaining why the changes are not approved.
Reset

Use to reset the page to the last entered values. If you have clicked any button, such as Calc or Contract, you have entered the values, and Reset will not remove them.

Help

Use to display the help topic that introduces or explains the displayed page. This button appears on most pages. If you need more help than is provided in the help topic, click the Contents button at the top of the topic page to display the help contents.

Prev

Use to display the previous record on the Personnel List. If you have made changes, a warning will be displayed, giving you the option to continue without saving, or to return to the page and save your changes.

Next

Use to display the next record on the Personnel List. If you have made changes, a warning will be displayed, giving you the option to continue without saving, or to return to the page and save your changes.
Setting Tuition Amounts and Enrollment Events

When you begin working on a graduate student’s support, you may need to specify the amount of the tuition for the academic year. You do not need to know the tuition amount. You can capture the official tuition amount on the Graduate Student Tuition page, reached by clicking on the Total Tuition and Fees (1) link on the Graduate Student Support Summary page.

The Graduate Student Tuition page also allows you to enter enrollment events, such as a leave of absence, In Absentia, and termination.

What’s On the Graduate Student Tuition Page

The Graduate Student Tuition page contains two areas:

- The area on the left shows the enrollment status changes and effective dates from the PeopleSoft Student Administration system. This data is usually current, but is not generally entered far in advance of the actual event.

- The area on the right shows Labor Accounting enrollment events, tuition, and fees. In this area, you can enter enrollment events, such as In Absentia, leave of absence, and termination, and you can enter any adjustments to the tuition and fees (this is rare, but may be done by the Graduate School in special circumstances, such as the death of a student).

An enrollment status or event that makes a student ineligible for support controls the ability to add internal support. When you add internal support, a distribution period beginning on the date of the enrollment event/status is automatically added, and you will not be able to enter support amounts for that period.

In general, Labor Accounting enrollment events will match Student Administration enrollment statuses. However, Labor Accounting is designed to provide some independence so you can enter events as soon as you know about them, which may be before the Student Administration system would capture them. It is assumed that ultimately the LA enrollment events will match the SA statuses.
If the LA enrollment events do not match the SA status, the enrollment events take precedence over the SA status information. For example, if the SA status shows the student as graduated on 2/1/07, but the LA enrollment events show the student graduating on 4/1/07, you can enter support for the period between 2/1/07 and 3/31/07. If no LA enrollment event is entered, the SA status determines whether you can add support for a period.

There are also buttons across the bottom of the page:

- **Add LA Period**: Click here to add a period, if, for example, the student goes on leave in the middle of a term.

- **Calc Tuit Amts**: Click here after entering enrollment events, to calculate the tuition and fees for the year. The total tuition and fees will be displayed on the Graduate Student Support Summary page, distributed appropriately across terms.

- **Match LA to SA**: Click here to capture an enrollment status change from the Student Administration system for use in Labor Accounting, or to revert to the Student Administration status if Labor Accounting enrollment events are incorrect. Any fee adjustments made on this page will remain, but the enrollment events will be changed to match the Student Administration data.

- **Clear LA Events**: Click here to remove all entries, both enrollment events and fee adjustments, in the Labor Accounting area of the page.

- **View In Eff**: Click here to see the enrollment events and fees currently in effect.

- **Reset**: Click here to return to the last values entered. Values are entered when you click any button.
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Matching to Student Administration

Student Administration data will be available for any active student in Labor Accounting, including students who are on leave or who have terminated their enrollment. However, Student Administration data is never copied into Labor Accounting automatically, so you can

- Enter Labor Accounting events regardless of the Student Administration status. This is helpful when you know about an upcoming event, and want to update your commitments immediately.
- Establish budget year tuition in Labor Accounting even without Student Administration data.
- Add tuition support for the budget year without establishing entitled tuition on the Graduate Student Tuition page.

**Note:** If the LA enrollment events do not match the SA status, the enrollment events take precedence over the SA status information. For example, if the SA status shows the student as graduated on 2/1/07, but the LA enrollment events show the student graduating on 4/1/07, you can enter support for the period between 2/1/07 and 3/31/07. If no LA enrollment event is entered, the SA status determines whether you can add support for a period.

If you want to capture Student Administration status changes, or revert to Student Administration statuses if Labor Accounting enrollment events are no longer correct, you can do so by clicking the Match LA to SA button on the Graduate Student Tuition page. A new period will be added if necessary, and the tuition and fees will be automatically recalculated.

**Note:** If the Total amount on the Graduate Student Tuition page changes when you match to the Student Administration data, you may need to adjust the student’s internal support to avoid oversupporting the student. See “Correcting Oversupport,” on page 104 for more information.
Capturing the Official Tuition Amount

You do not need to know the official tuition amount in order to establish the amount of tuition support needed for a particular year and term. Instead, you can capture the official tuition and fees on the Graduate Student Tuition page. The total tuition and fee amount will be carried over to the Graduate Student Support Summary page and distributed appropriately across terms.

Note: Before you can capture the tuition amount, the Labor Accounting enrollment events must be populated, either by matching to Student Administration data, or by entering the enrollment events yourself. When the Labor Accounting enrollment events have been populated, the Enr Status line on the Graduate Student Support Summary page shows the student’s status for each term.

To capture the tuition amount:

1. From the Graduate Student Support Summary page, click on the Total Tuition & Fees (1) link. The Graduate Student Tuition page is displayed.

2. If the Labor Accounting Enroll Event fields are blank, you must populate them, either by clicking the Match LA to SA button to carry over the Student Administration enrollment events, or by selecting the appropriate enrollment events for each term yourself. Valid values are:

   - **REG**: The student is enrolled as a regular graduate student.
   - **DCE**: The student status is Degree Candidacy Extended, that is, the student has completed enrollment but not yet earned the degree, and has therefore extended their degree candidacy at a lower rate.
   - **ABS**: The student is In Absentia.
   - **ABX**: The student is DCE, in Absentia.
   - **LOA**: The student is on leave of absence.
   - **VSRC**: The student is a visiting research collaborator.
   - **GRD**: The student has graduated.
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3. If any adjustments must be made to the regular tuition, enter the amount by which the tuition and fees should be reduced in the Adj field, preceded by a minus sign (as in -500.00).

Important! Only the Office of the Graduate School can make adjustments to the tuition and fees.

4. Click the Calc Tuit Amts button to calculate the tuition and fees.

Note: If you matched LA to SA, the tuition is calculated automatically. In that case, you only need to click the Calc Tuit Amts button if you have made other changes on the page.

5. Click the Summary tab to return to the Graduate Student Support Summary page.

6. If the Summary page now shows a negative number in the Unsupported Tuition line, you must adjust the Internal Support. See “Correcting Oversupport,” on page 104.

7. If you have no further changes to make, save the record or submit it for approval by clicking the appropriate button at the bottom of the page.

Adding a Period for an Enrollment Status Change

If a student’s enrollment status changes during a term and you want to enter the change before the Student Administration system can capture it, you will need to add a period so the tuition reflects the change in status.

Note: If you capture this change by matching LA to SA, the new period will be added automatically, and the tuition will be recalculated.

To add a Labor Accounting period:

1. On the Graduate Student Tuition page, click the Add LA Period button. The Add LA Period window is displayed.
2. Enter the date when the new period begins in the *Begin Date* field. (The period end date is the date when the next period begins.)

   **Tip!** *In any date field, you can double click to display the Calendar window where you can select a date. See “Using the Calendar Window,” on page 171 if you need instructions.*

3. Select the enrollment event from the drop-down list in the *Enr. Event* field.

4. Click the Finish button. The Graduate Student Tuition page is redisplayed showing the new period, and the tuition totals will be adjusted accordingly.

5. Click the Summary tab to return to the Graduate Student Support Summary page.

6. If the Summary page now shows a negative number in the Unsupported Tuition line, you must adjust the Internal Support. See “Correcting Oversupport,” on page 104.

7. If you have no further changes to make, save the record or submit it for approval by clicking the appropriate button at the bottom of the page.
Maintaining External Support

External support includes:

- Tuition paid by a sponsoring organization and billed through Princeton Receivables
- Tuition charged to a University project/grant and billed to a sponsoring organization by the Graduate School
- Payments made directly to the student by a sponsoring organization
- Payments made to the University by the student

The Princeton Receivables system receives the support information from Labor Accounting, and bills the appropriate people the specified amounts. All the support information goes on the student’s bill, so they know exactly who is providing support, and how much support they are providing.

After adding external support, you will need to adjust the internal support to ensure that the student is not receiving more support than they need.

Adding Sponsored Tuition

If a student is receiving tuition support from a sponsoring organization outside of Princeton that is billed through Princeton Receivables, you can enter that support on the Sponsored Tuition page.

**Important!** The sponsor must already be entered into the Princeton Receivables system. If the sponsor is not already on the list, you must arrange with the Princeton Receivables administrator to add the sponsor to the list.

To add sponsored tuition:

1. If necessary, display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. Expand the External Support lines by clicking the plus mark \( + \) to the left of the Total External Support (2) label.
3. Display the Sponsored Tuition page by clicking the Sponsored Tuition link on the Graduate Student Support Summary page, or clicking the Sponsored Tuition tab if you are already on one of the External Support pages.

4. Click the Add Support button to display input fields on the Sponsored Tuition page.

5. In the Sponsor field, select the name of the sponsor from the drop-down list.

   **Note:** If the sponsor does not show up in the drop-down list, contact the Princeton Receivables administrator to add the sponsor to the list.

6. Enter the amount of tuition the sponsor is paying in the Amount field.

7. Enter information about who to contact in the sponsoring organization, with their contact information in the Contact Info field.

8. Repeat Step 5 through Step 7 for the Spring term, as needed.

   **Tip!** You can use the Ctrl + C key to copy the Contact Info from the Fall term, and the Ctrl + V key to paste it into the Contact Info field for the Spring term.

9. Click the Calculate button to calculate the amounts.

10. Click the Summary tab to return to the Graduate Student Support Summary page.

11. If the Summary page now shows a negative number in the Unsupported Tuition line, you must adjust the Internal Support. See “Correcting Oversupport,” on page 104.

12. If you have no further changes to make, save the record or submit it for approval by clicking the appropriate button at the bottom of the page.

**Entering Tuition Billed through the Graduate School**

For some sponsors, such as foreign governments, private organizations, and individuals, the Graduate School bills the sponsor directly. The sponsor is assigned a project/grant, which you enter on the Tuition Billed page, along with the amount to be billed for the student, and any contact information you have for the sponsor.
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To add tuition billed through the Graduate School:

1. If necessary, display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. Expand the External Support lines by clicking the plus mark to the left of the Total External Support (2) label.

3. Display the Tuition Billed page by clicking the Tuition Billed link on the Graduate Student Support Summary page, or clicking the TuitionBilled tab if you are already on one of the External Support pages.

4. Click the Add Support button to display input fields on the Tuition Billed page.

5. In the P/G field, type the 7-digit project/grant number, or double-click to display the Find Project Grant page where you can locate the project/grant to be billed. (See “Using the Find Project/Grant Window,” on page 172 for instructions.) The project/grant will be entered for both terms.

6. In the Amount field for the Fall term, enter the amount to be billed for the Fall term.

7. In the Amount field for the Spring term, enter the amount to be billed for the Spring term.

8. Enter any information about the sponsor’s contact person, such as name and phone number, in the Contact Info field.

9. If the student is receiving support from multiple sponsors that are billed through the Graduate School, repeat Step 4 through Step 8.

10. Click the Calculate button to derive the Fall and Spring totals that will appear on the Summary page.

11. Click the Summary tab to return to the Graduate Student Support Summary page.

12. If the Summary page now shows a negative number in the Unsupported Tuition line, you must adjust the Internal Support. See “Correcting Oversupport,” on page 104.

13. If you have no further changes to make, save the record or submit it for approval by clicking the appropriate button at the bottom of the page.
**Entering Tuition Paid Directly to a Student**

Sometimes, a sponsor pays tuition support directly to the student. It is not required that you enter this information into Labor Accounting; however, entering the amounts here provides a more complete picture of the student’s total support, and can help to prevent oversupport.

**To enter tuition paid to a student directly by the sponsor:**

1. If necessary, display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. Expand the External Support lines by clicking the plus mark \( + \) to the left of the *Total External Support (2)* label.

3. Display the Paid to Student page by clicking the Paid to Student link on the Graduate Student Support Summary page, or clicking the Paid to Student tab if you are already on one of the External Support pages.

4. Click the Add Support button to display input fields on the Paid to Student page.

5. In the *Sponsor* field, type the name of the sponsor. The name will be entered for both terms as you type.

6. Enter the amount of tuition the sponsor is paying in the *Amount* field.

7. Enter information about who to contact in the sponsoring organization, with their contact information in the *Contact Info* field.

8. Repeat Step 6 and Step 7 for the Spring term, as needed.

   **Tip!** You can use the Ctrl + C key to copy the Contact Info from the Fall term, and the Ctrl + V key to paste it into the Contact Info field for the Spring term.

9. Click the Calculate button to calculate the amounts.

10. Click the Summary tab to return to the Graduate Student Support Summary page.

11. If the Summary page now shows a negative number in the Unsupported Tuition line, you must adjust the Internal Support. See “Correcting Oversupport,” on page 104.
12. If you have no further changes to make, save the record or submit it for approval by clicking the appropriate button at the bottom of the page.

**Entering Tuition Paid by a Student**

If a student has committed to pay any part of the tuition him- or herself, you can enter the amount the student will pay directly on the Graduate Student Support Summary page.

**To enter student self-payments:**

1. Locate the student (if necessary) using the General Browse page (see “Locating Personnel on the General Browse Page,” on page 26). The Graduate Student Support Summary page is displayed.

   OR

1. If you are on another page of the student’s record, click the Summary tab to display the Graduate Student Support Summary page.

2. Click the plus mark next to the Total External Support for the desired year to display the external support lines.

3. On the Student Self Pay line, type the amount the student will pay in the **Tuition & Fees** field for each term.

4. Click the **Calc** button at the bottom of the page to recalculate the total support.

5. If the Summary page now shows a negative number in the Unsupported Tuition line, you must adjust the Internal Support. See “Correcting Oversupport,” on page 104.

6. If you have no further changes to make, save the record or submit it for approval by clicking the appropriate button at the bottom of the page.
Maintaining Internal Support

Internal support is funding provided by the University, in the form of

- a fellowship or grant,
- an assistant appointment, in which a salary is paid in recompense for instruction (AI), research (AR), or residential college master responsibilities (AM),
- or any combination of the above.

You can enter the amount of support a student receives in each earnings type, as well as adding or changing distributions (project/grants) within the earnings type using various pages accessible from the Graduate Student Support Summary page. You can also add new distribution periods, if necessary, on the various graduate student pages.

**Note:** You must have Department Input or Department Authorization access to make changes to graduate student support. However, a person with project/grant authorization may change distributions for the project/grants for which they are authorized.

Maintaining AI Support

AI support provides recompense in the form of salary and tuition for instructional hours spent by the graduate student. You cannot make changes to Standard AI support on the Graduate Student Support Summary page, because the support is calculated based on the number of hours worked. For Standard AI support, you must click the Standard AI link on the Graduate Student Support Summary page, and enter the hours on the Asst Instr page.

For an adjustment to the Standard AI support, you can enter the amount of the adjustment directly on the Graduate Student Support Summary page, provided that the adjustment does not require the addition of a new distribution period or project/grant. Any more complicated adjustments must be made on the Asst Instr page.

On the Asst Instr page, you can also see the number of hours the student has taught in prior terms, and if the student has passed Generals, the date when they passed. When the student has taught long enough, you can enter the date that will trigger a change in the AI Rate, and you can indicate whether the student is proficient in English.
You can also add and delete periods (see “Adding and Deleting Distribution Periods,” on page 93), add project/grants, and change distributions across project/grants on the Asst Instr page (see “Adding or Changing Project/Grant Distributions,” on page 97).

If the student is receiving summer support, you can click the Add button under Summer AI Support Commitment & Project Distribution to add the summer salary stipend and, for VSRCs only, summer tuition. See “Adding Summer Support,” on page 105 for instructions.

**Adding a Standard AI**

When entering AI support, you must include the course number for each course that the student is teaching, and the number of hours the student is expected to spend in instruction (of a precept, a class, a lab, or a language) and grading for each course. This information is used to calculate the amount of support, and is captured for the Teaching Budget.

The AI support will be distributed automatically to the project/grant set as the default for your department for AI support. If you need to change the project/grant distributions, you may do so on this page (see “Adding or Changing Project/Grant Distributions,” on page 97 for instructions).

**To add Standard AI support:**

1. On the Graduate Student Support Summary page, click the Standard AI link. The Asst Instr page is displayed.

   **Tip!** If you are on another internal support page, simply click the Asst Instr tab to display the Asst Instr page.

2. There will be at least 2 distribution periods, one for the Fall term and one for the Spring term.

   **Note:** If the student has passed the General Exam, and the post general effective date has been entered, a separate distribution period will be added automatically beginning with the post general effective date.

   If you need to add another distribution period, click the Add Period button, enter the *Begin Date*, and click the *Finish* button.
3. If the student is working on more than one course, click the Add/Drop link below the Course # field to display the Add/Drop Course pop-up window. Complete the fields on the Add/Drop Course window as described in Step 4 and Step 5.

Note: All courses must appear on the Add/Drop Course window to be included in the AI support. If you have already added a course on the Asst Instr page, and you do not see it on the Add/Drop Course window, click the Close button to return to the Assts Instr page, and then click the Calculate button to save the information entered there. You can then return to the Add/Drop Course window to enter additional courses, and the existing course will be included.

If the student is working on only one course, complete the fields on the Asst Instr page as described in Step 4 and Step 5.

4. Enter the course number of the course the student will be teaching in the first semester in the Course# field for the first period. Include the subject code and catalog number, as in PHY 101.

5. Enter the teaching/grading contact hours per week in the Hours of Activity fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prct</td>
<td>Enter the total time spent leading a precept</td>
</tr>
<tr>
<td>Cls</td>
<td>Enter the total time spent teaching a class</td>
</tr>
<tr>
<td>Lab</td>
<td>Enter the total time spent teaching a lab</td>
</tr>
<tr>
<td>Lang</td>
<td>Enter the total time spent teaching a language lab</td>
</tr>
<tr>
<td>Grd</td>
<td>Enter the total time spent grading.</td>
</tr>
</tbody>
</table>

Note: If the student is receiving 100% of their support from a Standard AI, the Total Hours would be 6. If they receive 50% of their support from the AI, the Total Hours would be 3.

6. If the student is working on more than one course during this period, in the Add/Drop Course window, click the Add button to add a row for the next course.

a) Then complete the fields for the next course as described in Step 4 and Step 5.

b) Repeat as often as needed to add all the courses the student will be working on.
c) When you have entered all the courses and hours, click the Finish button to return to the Asst Instr page.

The Course # field will show a value of MULT, and the sum of all activity hours will appear in the hours fields. The system will calculate the total hours and total salary amount in the appropriate columns.

7. Repeat Step 3 through Step 6 for the second semester period.

8. If the student is proficient in English, click on the Proficient in English checkbox in the Related Info area to select it.

9. Click the Calculate button to calculate the salary and tuition amounts and distribute the support to the department’s default project/grant for a standard AI. If you want to change the project/grant distributions, see “Adding or Changing Project/Grant Distributions,” on page 97, for instructions.
10. If you are finished with the standard AI support, click the Summary tab to return to the Graduate Student Support Summary page, or click another tab to enter support in another earnings type.

11. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**Adjusting AI Support**

You can make adjustments to the Standard AI on the AI Adjustment line of the Graduate Student Support Summary page, or you can enter the adjustments on the Asst Instr page.

*Important! All AI support must include a standard amount based on hours of activity, which means you must enter some amount in the standard AI. You may provide adjustments in addition to the standard AI amount, but you must provide hours of activity for every AI.*

When you enter adjustments on the Graduate Student Support Summary page, and the earnings type includes multiple distribution periods, the adjustment for each period will be calculated based on the percentages of the total time in each period. If this is not what you want (for example, if you want the adjustment limited to a single period), you should enter the adjustment for the period directly on the Asst Instr page.

*Note: Adjustments for rate changes due to passing Generals or amassing enough teaching hours to qualify for a higher rate are made automatically when the Generals Date or AI Rate Date is entered. If the rate change occurs within an existing period, a new period will be added beginning with the date of the rate change. See “Changing The AI Rate,” on page 67.*
When you enter adjustments on the Graduate Student Support Summary page, and the earnings type is distributed across multiple project/grants, the adjustment for each project/grant will be calculated based on the percentages specified for each project/grant on the Asst Instr page. If this is not what you want (for example, if you want the adjustment limited to a single project/grant), you will have to edit the project/grant distributions on the Asst Instr page (see “Adding or Changing Project/Grant Distributions,” on page 97). For complex distributions, you might want to enter them directly on the Asst Instr page.

To adjust AI support on the Graduate Student Support Summary page:

1. On the Graduate Student Support Summary page, locate the AI Adjustment line, just below the Standard AI line.

2. To increase the AI salary for a term, enter the amount of the increase in the Sal, Stip, & Allowances field in the appropriate term. To reduce the AI salary for a term, enter a minus sign (-) followed by the amount the salary is to be reduced in the Sal, Stip, & Allowances field in the appropriate term.

3. To increase the AI tuition support for a term, enter the amount of the increase in the Tuition & Fees field in the appropriate term. To reduce the AI tuition support for a term, enter a minus sign (-) followed by the amount the tuition support is to be reduced in the Tuition & Fees field in the appropriate term.

4. Click the Calc button to recalculate the total support.

5. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.
If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

To enter adjustments on the Asst Instr page:

1. If you are not already on the Asst Instr page, click the AI Adjustment link on the Graduate Student Support Summary page, or click the Asst Instr tab.

2. If there are multiple periods (for example, one for the Fall semester and one for the Spring semester), locate the period in which the adjustment should occur.

   If you need to add a new period, see “Adding and Deleting Distribution Periods,” on page 93 for instructions.

3. To adjust the salary, enter the amount over or under the standard AI salary in the Salary Amt field in the Adj line. To decrease the salary, enter the amount preceded by a minus sign.
4. To adjust the tuition support, enter the amount over or under the standard AI tuition support in the *Tuition Amt* field in the Adj line. To decrease the tuition support, enter the amount preceded by a minus sign.

**Note:** If you know only the total amount, and are not sure how much is standard support and how much is an adjustment,

a) enter the total amount in the *Salary Amt* and the *Tuition Amt* fields of the Adj line,

b) click the $ checkboxes, and

c) click the Calculate button.

The system will determine the percentage of standard support, and any amount over that will appear in the Adj fields.

5. Click the Calculate button to calculate the totals. The adjustment will also be calculated across all project/grants. To distribute the adjustment to a specific project/grant, see “Adding or Changing Project/Grant Distributions,” on page 97.

**Important! If the Total Hours changes, you must change the Hours of Activity values so they sum to the same value as the Total Hours. You will not be able to submit the changes from the summary page if the sum of the Hours of Activity does not equal the Total Hours.**

6. When the distributions are correct, you can return to the Graduate Student Support Summary page or proceed to another earnings type page by clicking on the appropriate tab.

7. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.
If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**Changing The AI Rate**

The AI Rate increases when a student has taught long enough (based on either hours or terms taught). When the student qualifies, you can enter the AI Rate Date on the Asst Instr page to trigger the rate change. A new period will be created, and the support amounts will be increased by the appropriate rate.

**Note:** Passing the General exams also triggers the higher rate, regardless of how many hours the student has taught.

**To change the AI Rate Date:**

1. Display the student’s Graduate Student Support Summary page as described in “Displaying a Student’s Support Summary,” on page 42.

2. Click on the Standard AI link for the year in which the rate will change.

   **Tip!** You may need to expand a different year, by clicking on the plus mark before the year.

3. On the Asst Instr page, enter the date when the rate should change in the AI Rate Date field, in the Related Info area.

4. Click the Calculate button to recalculate the commitments. A new distribution period will be added, if the date does not fall at the beginning of an existing period.
5. When the distributions are correct, you can return to the Graduate Student Support Summary page or proceed to another earnings type page by clicking on the appropriate tab.

6. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

   If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

### Status Changes and AI Support

When a student’s status changes, and the Labor Accounting Enrollment Event is added on the Graduate Student Tuition page, the amount of tuition and fees to be charged is changed. However, the amount of support provided does not automatically change. You will need to change each internal support page that applies for that student, adding a new period as needed, and entering the appropriate amount of support. For instructions on adding a new period, see “Adding and Deleting Distribution Periods,” on page 93.

### Changing and Deleting Multi-Course Activity Hours

If you need to change the course or hours of activity for a student with multiple course responsibilities, you will need to use the Add/Drop Course window, accessed from the Asst Instr page.

#### To change hours of activity or courses for a multi-course AI:

1. If you are not already on the Asst Instr page, click on the Standard AI link on the Graduate Student Support Summary page, or click on the Asst Instr tab from any other internal support page.
2. In the AY AI Support Commitment area, locate the period for which you want to change hours of activity.

3. Click the Add/Drop link to display the Add/Drop Course window.

4. Make the desired changes to any of the displayed fields.

5. Click the Finish button to return to the Asst Instr page.

**To remove a course from a multi-course AI:**

1. If you are not already on the Asst Instr page, click on the Standard AI link on the Graduate Student Support Summary page, or click on the Asst Instr tab from any other internal support page.

2. In the AY AI Support Commitment area, locate the period for which you want to remove the course.

3. Click the Add/Drop link to display the Add/Drop Course window.

4. On the Add/Drop Course window, click the scissors at the right end of the line you want to remove.

5. If you need to adjust the hours for the remaining course(s), you can do so on the Add/Drop Course window, or, if only one course remains, on the Asst Instr page.

6. Click the Finish button to return to the Asst Instr page. The information will be updated, and if only a single course remains, its number will appear in the Course # field, rather than MULTI.

**Removing AI Support**

If you need to remove AI support for a student, you must zero out the Hours of Activity for the period in which the student no longer receives AI support. To remove all AI support for a student, zero out the Hours of Activity for all periods in the year.

**To remove AI support:**

1. If you are not already on the Asst Instr page, click on the Standard AI link on the Graduate Student Support Summary page, or click on the Asst Instr tab from any other internal support page.
2. In the AY AI Support Commitment area, locate the period for which you want to remove support. If you need to add a new period (for example, if the student will be on leave for a month), see “Adding and Deleting Distribution Periods,” on page 93 for instructions.

3. In the Hours of Activity fields, zero out all fields by typing 0.0 in each field.

   **Tip! It is not necessary to delete the Course#**.

4. If there were adjustments, zero out the Adj fields for the same period.

5. Click the Calculate button to remove the support for the zeroed out period.

   ![Image showing the calculation process]

   Project/grant distributions at the bottom of the page will also reflect the changed amounts.

6. To remove any blank lines, click the Clean Data button at the bottom of the page.

7. When the support commitments are correct, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

8. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

   If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.
**Adding a Standard AR**

AR support provides recompense in the form of salary and tuition for research work by the graduate student. You can add and make simple changes to AR support directly on the Graduate Student Support Summary page. To add or change complex distributions for Standard AR support, you can click the [Standard AR](#) link on the Graduate Student Support Summary page, and enter the percentage or amount of support on the Asst Research page.

For an adjustment to the Standard AR support, you can enter the amount of the adjustment directly on the Graduate Student Support Summary page, provided that the adjustment does not require the addition of a new distribution period or project/grant. Any more complicated adjustments must be made on the Asst Research page.

You can also add and delete periods (see “Adding and Deleting Distribution Periods,” on page 93), add project/grants, and change distributions across project/grants on the Asst Research page (see “Adding or Changing Project/Grant Distributions,” on page 97).

If the student is receiving summer support, you can click the Add [Add](#) button on the Asst Research page under Summer AR Support Commitment & Project Distribution to add the summer salary stipend (and tuition, if necessary, for a VSRC). See “Adding Summer Support,” on page 105 for instructions.

**Adding a Standard AR**

You can add a standard AR either on the Graduate Student Support Summary page, or on the Asst Research page.

If the support is a simple percentage that can be distributed to the default project/grant (determined by your department for each earnings type) in the default earnings period, you can use the Graduate Student Support Summary page. If the support requires more complex distributions, use the Asst Research page to enter the support.

**Note:** If the award is a sponsored project, the system will enter the bookkeeping entries for cost sharing when you enter the total tuition percentage awarded to the student. See “Working with Sponsored Projects,” on page 76 for more information.
To add a standard AR on the Graduate Student Support Summary page:

1. Display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. On the Standard AR line, enter the percentage of the total support to be supplied by the AR for each term.

3. Click the Calc button at the bottom of the page to recalculate the amounts and any University Fellowship percentage. Changed values will be displayed in blue.

**Note:** If the student has passed the General Exam, and the post general effective date has been entered, a distribution period will be added automatically to reflect the increased rate for the AR.

4. If you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

To add AR support on the Asst Research page:

1. Display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. To add AR support, click the Standard AR link. The Asst Research page is displayed.

3. In the AY AR Support Commitment area, enter the percentage of total support to be provided through the AR in the Total Pct field.
4. Click the Calculate button to calculate the Salary Amt and Tuition Amt.

**Note:** If the student has passed the General Exam, and the post general effective date has been entered, a distribution period will be added automatically to reflect the increased rate for an AR.

5. If you need to distribute the support over multiple periods, see “Adding and Deleting Distribution Periods,” on page 93.

6. If you need to distribute the support across multiple project/grants, see “Adding or Changing Project/Grant Distributions,” on page 97.

7. When the support commitments are correct, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

8. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

   If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

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### Adjusting AR Support

You can make adjustments to the standard AR support on either the Graduate Student Support Summary page, or the Asst Research page.

**Important!** All AR support must include a standard amount based on a percentage of an FTE, so the project manager or PI can certify the percentage of effort. You may provide adjustments in addition to the standard AR amount, but you **must** provide the Total Pct for every AR.

On the Graduate Student Support Summary page, any adjustments must be made to each term in which they apply.

**Tip!** If you know only the total amount of support to be provided by the AR, use the Asst Research page to enter the new total. You can then calculate the percentage of the standard grant and the adjustment based on the dollar amount you entered.
On the Asst Research page, the adjustment is made to each period. If multiple periods are displayed, you can enter an adjustment for each period, as required. If only one period is displayed, the adjustment will be made for the entire academic year. If the adjustment applies to only part of the year, you can add a distribution period, and make the adjustment to that period only. See “Adding and Deleting Distribution Periods,” on page 93 for instructions for adding a distribution period.

**Note:** Adjustments to an AR for rate changes due to passingGenerals are made automatically when the Generals Date is entered. If the rate change occurs within an existing period, a new period will be added beginning with the date of the rate change.

**To adjust support on the Graduate Student Support Summary page:**

1. If you are not already on the Support Summary page for the student, display the page as described in “Displaying a Student’s Support Summary,” on page 42.

2. Locate the AR Adjustment line. Notice that there are open data fields for salary, stipend, & allowances amounts and tuition and fee amounts in each term.

3. To add support, enter the amount of additional funding in the appropriate field.

4. To reduce support, type a minus sign, followed by the amount by which the support should be reduced in the appropriate field.

5. Click the Calc button at the bottom of the page to recalculate the amounts. Changed values will be displayed in blue. If there are multiple distribution periods or project/grants, the adjustments will be distributed across the periods and project/grants based on each period’s or project/grant’s percentage of the total.

6. If you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

   If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.
To adjust support on the Asst Research page:

1. Display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. To adjust AR support, click the Standard AR link. The Asst Research page is displayed.

3. In the Adj line of the AY AR Support Commitment area, enter the amount of the adjustment for the Salary Amt and the Tuition Amt, as applicable. Click the Calculate button to see the recalculated totals.

   If you know only the total amount, and are not sure how much is standard support and how much is an adjustment,
   a) enter the total amount in the Salary Amt and the Tuition Amt fields of the Adj line,
   b) click the $ checkboxes, and
   c) click the Calculate button.

   The system will determine the percentage of standard support, and any amount over that will appear in the Adj fields.

4. If the support changes during different periods, see “Adding and Deleting Distribution Periods,” on page 93.

5. If you need to distribute the support across multiple project/grants, see “Adding or Changing Project/Grant Distributions,” on page 97.

6. When the support commitments are correct, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.
7. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**Changing AR Support**

When a student’s status changes, and the Labor Accounting Enrollment Event is added on the Graduate Student Tuition page, the amount of tuition and fees to be charged is changed. However, the amount of support provided does not automatically change. You will need to change each internal support page that applies for that student, adding a new period as needed, and entering the appropriate amount of support. For instructions on adding a new period, see “Adding and Deleting Distribution Periods,” on page 93.

If an award ends or a project closes, you will need to remove the project/grant and redistribute the remaining support. See “Adding or Changing Project/Grant Distributions,” on page 97 for instructions.

**Working with Sponsored Projects**

Sponsored projects generally share the cost of tuition with the University. This means that when a student receives support from a sponsored project, 50% of the tuition is charged to the sponsored project, and 50% of the tuition is charged to the Asst Res Tuit project/grant (xxx1902). However, you only need to enter the total percentage of tuition charged for the AR; the system will enter the bookkeeping entries to split the tuition charges for cost sharing.

When you add an AR for a sponsored project, enter the total tuition percentage awarded through the AR. For example, if the student has a 50% AR, funded by the sponsored project, use the arrow button to copy the percentage from the AR Salary to the AR Tuition area. When you click the Calculate button, the full tuition support is calculated based on the award percentage, and then bookkeeping entries are added to deduct half the total from the project, and add it to the department’s 1902 (Asst Res Tuit) account.
The distribution lines for both bookkeeping entries are displayed after you click the Calculate button, unless you are authorized only for the original project/grant, in which case you see only the entry for the deduction from the sponsored project. Bookkeeping entries are indicated by a lower case b after the project/grant number (for deductions) and before the project/grant number (for additions).

**Removing AR Support**

If a student is no longer receiving an AR, you can remove the support on either the Graduate Student Support Summary page, or the Asst Research page. Use the Graduate Student Support Summary page to remove all support for the earnings type. If you are removing support for only part of the year, use the Asst Research page to remove the support for the affected period.

**To remove support on the Graduate Student Support Summary page:**

1. Display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. Locate the line for the Standard AR.

3. Type 0 in the % fields for each term in which the student will no longer receive this type of support.

4. If there were adjustments for the AR, type 0 in the Sal, Stip, & Allowances field and the Tuition & Fees field for each term in which the student will no longer receive this type of support.

5. Click the Calc button to recalculate the total support.

6. If support needs to be redistributed to other earnings types, make the changes as described for those earnings types.
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7. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

To remove support on the Asst Research page:

1. Display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. To remove AR support, click the Standard AR link. The Asst Research page is displayed.

3. If you need to remove support for only part of an existing period (for example, if a student goes on leave for a month), add a new period, as described in “Adding and Deleting Distribution Periods,” on page 93.

4. In the AY AR Support Commitment area, type 0 in the Total Pct field for each period in which the student will no longer receive this type of support.

5. If there are adjustments, type 0 in the Adj fields for each period in which the student will no longer receive this type of support.

6. If you need to remove a project/grant, see “Adding or Changing Project/Grant Distributions,” on page 97.

7. Click the Calculate button to recalculate the total support.

8. To remove any blank lines, click the Clean Data button at the bottom of the page.

9. When the support commitments are correct, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

10. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.
**Adding a Standard AM**

AM support provides recompense for assisting a residential college master. You can add and make simple changes to AM support directly on the Graduate Student Support Summary page. To add or change complex distributions for Standard AM support, you can click the **Standard AM** link on the Graduate Student Support Summary page, and enter the percentage or amount of support on the Asst Master page.

**Note:** Assistant Master (AM) salaries are paid through Time Collection, so the Salary Amt fields will be dimmed on the Asst Master page, and the Sal, Stip, & Allowances input boxes will not be open for input on the Graduate Student Support Summary page.

For an adjustment to the Standard AM support, you can enter the amount of the adjustment directly on the Graduate Student Support Summary page, provided that the adjustment does not require the addition of a new distribution period or project/grant. Any more complicated adjustments must be made on the Asst Master page.

You can also add and delete periods (see “Adding and Deleting Distribution Periods,” on page 93), add project/grants, and change distributions across project/grants on the Asst Master page (see “Adding or Changing Project/Grant Distributions,” on page 97).

If the student is receiving summer support, you can click the Add button on the Asst Master page under Summer AM Support Commitment & Project Distribution to add the summer salary stipend. See “Adding Summer Support,” on page 105 for instructions.

**Adding a Standard AM**

You can add a standard AM either on the Graduate Student Support Summary page, or on the Asst Master page.

If the support is a simple percentage that can be distributed to the default project/grant (determined by your department for each earnings type) in the default earnings period, you can use the Graduate Student Support Summary page. If the support requires more complex distributions, use the Asst Master page to enter the support.
To add a standard AM on the Graduate Student Support Summary page:

1. Display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. On the Standard AR or Standard AM line, enter the percentage of the total support to be supplied by the AR or AM for each term.

3. Click the Calculate button at the bottom of the page to recalculate the amounts and any University Fellowship percentage. Changed values will be displayed in blue.

4. If you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

   If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

To add AM support on the Asst Master page:

1. Display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. To add AM support, click the Standard AM link. The Asst Master page is displayed.

3. In the AY AM Support Commitment area, enter the percentage of total support to be provided through the AM in the Total Pct field.

4. Click the Calculate button to calculate the Tuition Amt.

5. If the support changes during different periods, see “Adding and Deleting Distribution Periods,” on page 93.
6. If you need to distribute the support across multiple project/grants, see “Adding or Changing Project/Grant Distributions,” on page 97.

7. When the support commitments are correct, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

8. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**Adjusting AM Support**

You can make adjustments to the standard AM support on either the Graduate Student Support Summary page, or the Asst Master page. On the Graduate Student Support Summary page, any adjustments must be made to each term in which they apply.

On the Asst Master page, the adjustment is made to each period. If multiple periods are displayed, you can enter an adjustment for each period, as required. If only one period is displayed, the adjustment will be made for the entire academic year. If the adjustment applies to only part of the year, you can add a distribution period, and make the adjustment to that period only. See “Adding and Deleting Distribution Periods,” on page 93 for instructions for adding a distribution period.

*Tip! If you know only the total amount of support to be provided by the AM, use the Asst Master page to enter the new total. You can then calculate the percentage of the standard grant and the adjustment based on the dollar amount you entered.*

**To adjust support on the Graduate Student Support Summary page:**

1. If you are not already on the Support Summary page for the student, display the page as described in “Displaying a Student’s Support Summary,” on page 42.

2. Locate the AM Adjustment line. Notice that there are open data fields for tuition and fee amounts in each term.
3. To add support, enter the amount of additional funding in the appropriate field.

4. To reduce support, type a minus sign, followed by the amount by which the support should be reduced in the appropriate field.

5. Click the Calc button at the bottom of the page to recalculate the amounts. Changed values will be displayed in blue. If there are multiple distribution periods or project/grants, the adjustments will be distributed across the periods and project/grants based on each period’s or project/grant’s percentage of the total.

6. If you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**To adjust support on the Asst Master page:**

1. Display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. To adjust AM support, click the Standard AM link. The Asst Master page is displayed.

3. If the adjustment does not apply to the entire period, add a new period as described in “Adding and Deleting Distribution Periods,” on page 93.

4. In the Adj line of the AY AM Support Commitment area, enter the amount of the adjustment for the Tuition Amt, as applicable. Click the Calculate button to see the recalculated totals.

If you know only the total amount, and are not sure how much is standard support and how much is an adjustment,

a) enter the total amount in the Tuition Amt fields of the Adj line,

b) click the $ checkboxes, and
c) click the Calculate button.

The system will determine the percentage of standard support, and any amount over that will appear in the Adj fields.

5. If you need to distribute the support across multiple project/grants, see “Adding or Changing Project/Grant Distributions,” on page 97.

6. When the support commitments are correct, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

7. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

   If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.
Chapter 4: Maintaining Graduate Student Support

Changing AM Support

When a student’s status changes, and the Labor Accounting Enrollment Event is added on the Graduate Student Tuition page, the amount of tuition and fees to be charged is changed. However, the amount of support provided does not automatically change. You will need to change each internal support page that applies for that student, adding a new period as needed, and entering the appropriate amount of support. For instructions on adding a new period, see “Adding and Deleting Distribution Periods,” on page 93.

Removing AM Support

If a student is no longer receiving an AM, you can remove the support on either the Graduate Student Support Summary page, or the Asst Master page. Use the Graduate Student Support Summary page to remove all support for the earnings type. If you are removing support for only part of the year, use the Asst Master page to remove the support for the affected period.

To remove support on the Graduate Student Support Summary page:

1. Display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.
2. Locate the line for the Standard AM.
3. Type 0 in the % fields for each term in which the student will no longer receive this type of support.
4. If there were adjustments for the AM, type 0 in the Tuition & Fees field for each term in which the student will no longer receive this type of support.
5. Click the Calc button to recalculate the total support.
6. If support needs to be redistributed to other earnings types, make the changes as described for those earnings types.
7. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.
If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**To remove support on the Asst Master page:**

1. Display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. To remove AM support, click the [Standard AM](#) link. The Asst Master page is displayed.

3. If you only need to remove support for part of an existing period, add a new period as described in “Adding and Deleting Distribution Periods,” on page 93.

4. In the AY AM Support Commitment area, type 0 in the Total Pct field for each period in which the student will no longer receive this type of support.

5. If there are adjustments, type 0 in the Adj fields for each period in which the student will no longer receive this type of support.

6. If you need to remove a project/grant, see “Adding or Changing Project/Grant Distributions,” on page 97.

7. Click the Calculate button to recalculate the total support.

8. To remove any blank lines, click the Clean Data button at the bottom of the page.

9. When the support commitments are correct, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

10. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.
Adding a University Fellowship

University fellowships include

- the standard, adjustable University Fellowship.
- non-adjustable University fellowships (generally, a departmental fellowship).
- a fellowship which matches the tuition support from an external fellowship that provides maintenance and partial tuition, and is charged to a particular project/grant.
- and any special grants, awards, or prizes from the University that are paid in a single month.

In the graduate student's annual support contract with the University (either the Admission contract or the Reenrollment contract), the minimum amount of University support is established for the year. In the absence of any other support, the student is paid this amount in fellowship support. Hence, the default support type for all graduate students is the adjustable University Fellowship. Until you add another internal support type, the adjustable University Fellowship will be 100%. However, until you capture the Total Tuition and Fees, the amounts will remain 0.

Adding an Adjustable University Fellowship

The amount of stipend support (not including tuition) established in the graduate student contract is entered into the Full Term Stipend Amt field on the Univ Fellshp page to record the full amount of the fellowship contract.

If the student receives only the University Fellowship stipend, they will receive the full amount entered in the Full Term Stipend Amt field. If the student also receives an AI, AR, or AM appointment, the fellowship stipend will be reduced by the amount of the appointment stipend. However, the Full Term Stipend Amt does not change, and if the appointment is removed, the fellowship stipend would return to the full amount (which is why you need to enter and store the full, contract, amount).

The percent of support provided by the adjustable University fellowship is automatically adjusted when you add or change AI, AR, or AM support. However, the actual amount of support must be calculated on the Univ Fellshp page.
Tip! Because the percent for the adjustable University fellowship is automatically adjusted when you add or change an AI, AR, or AM appointment, it is most efficient to enter them first. Then, when all other support for the student has been entered, open the Univ Fellshp page to calculate the actual stipend and tuition amounts to be provided by the adjustable University Fellowship.

To add an adjustable University fellowship:

1. Display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. Click on the Adjustable Fellowship link to display the Univ Fellshp page. Notice that the Total Pct field already shows the percent of support to be provided by the fellowship.

3. If the contract includes a stipend, enter the complete amount of the stipend for a single term in the Full Term Stipend Amt field.

4. Click the Calc Tuition button to calculate the tuition, based on the total tuition required and the percentage of the total indicated in the Total Pct field. The stipend and tuition are distributed to the default project grant specified for your department.

5. If you need to distribute the support across multiple project/grants, see “Adding or Changing Project/Grant Distributions,” on page 97.

6. If you need to change the support in different periods, see “Adding and Deleting Distribution Periods,” on page 93.

7. When the support commitments are correct, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

8. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

   If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.
Chapter 4: Maintaining Graduate Student Support

**Changing an Adjustable University Fellowship**

If you add an AI, AR, or AM appointment, the total percentage of the University Fellowship changes automatically. However, the tuition amounts for the University Fellowship must be recalculated. To recalculate the tuition amounts, use the Calc Tuition button on the Univ Fellshp page.

If the student gains additional external support, other support from the University would be reduced. When this happens, you must also recalculate the tuition amounts on the Univ Fellshp page.

Occasionally, a contract change may result in a change to the Full Term Stipend amount. If that happens, you must enter the new Full Term Stipend amount on the Univ Fellshp page.

**To recalculate tuition after changing appointments or external support:**

1. From the Graduate Student Support Summary page, click the Adjustable Fellowship link, or from any other internal support page, click the Univ Fellshp tab. The Univ Fellshp page is displayed.

2. Click the Calc Tuition button to recalculate the tuition based on the changed percentage.

3. If you need to change project/grant distributions, see “Adding or Changing Project/Grant Distributions,” on page 97.

4. If you need to change the support in different periods, see “Adding and Deleting Distribution Periods,” on page 93.

5. When the support commitments are correct, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

6. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

   If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.
To change the Full Term Stipend amount:

1. Display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. Click on the Adjustable Fellowship link to display the Univ Fellshp page. Notice that the Total Pct field already shows the percent of support to be provided by the fellowship.

3. In the Full Term Stipend Amt field, type the changed amount of the stipend for a single term.

4. Click the Calculate button to recalculate the total stipend for the academic year, based on the amount you entered in the Full Term Stipend Amt field.

5. If you need to change project/grant distributions, see “Adding or Changing Project/Grant Distributions,” on page 97.

6. If you need to distribute the support over multiple periods, see “Adding and Deleting Distribution Periods,” on page 93.

7. When the support commitments are correct, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

8. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

   If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.
Adding Matching Tuition

When an external fellowship provides maintenance and partial tuition, the Graduate School may match the tuition provided by that fellowship, unless the student holds an AI or AM appointment that picks up the rest of the tuition, or the contract does not specify full support. Matching tuition is always charged to project/grant 9711000.

To add matching tuition on the Graduate Student Support Summary page:

1. Display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. Enter the matching tuition amount for each term in the input boxes on the Matching Tuition line.

3. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

To add matching tuition on the Other Fellowship page:

1. Display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. Click the Matching Tuition link to display the Other Fellowship page.

3. In Tuition Amt field of the AY Matching Fellowship Tuition area, enter the amount of tuition to be matched in the displayed period (usually, the full academic year). This amount will be distributed to project/grant 9711000.

4. If the matching tuition is not required for the full period, you can add another period as described in “Adding and Deleting Distribution Periods,” on page 93, and adjust the amount for the new period.

5. Click the Calculate button to derive the Fall and Spring totals.
6. When you have entered the matching tuition, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

7. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**Adding a Non-adjustable Fellowship**

A non-adjustable fellowship is an award in which the stipend and fellowship do not change based on increased or decreased support from other sources. Non-adjustable fellowships are always charged to a University project/grant.

Other awards included in the Non-adjustable Fellowship line on the Summary page include special fellowship grants, awards, or prizes paid in a single month. On the Graduate Student Support Summary page, the non-adjustable stipend will include these other awards.

**To add a non-adjustable fellowship:**

1. Display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. Click the Non-adjustable Fellowship link to display the Other Fellowship page.

3. In the AY Non-adjustable Fellowship Support area (at the top of the page), click the Add button to display the Add Period window.

   a) The Begin Date and End Date are filled in by default with the dates for the academic year. If the period is not for the entire academic year, enter the appropriate dates.

   **Tip! Double click on the date fields to open the Calendar window, where you can select the date you want.** See “Using the Calendar Window,” on page 171 for more information.
b) In the P/G field, type the seven-digit project/grant number to be charged, or double click to open the Find Project/Grant window. (See “Using the Find Project/Grant Window,” on page 172 for more information.)

c) If the fellowship is providing a stipend, enter the total amount to be paid for the period in the Stip Amt field. If the period is the academic year, the amount should be the total for both terms.

d) If the fellowship is paying tuition, enter the total tuition support provided by the fellowship during the specified period in the Tuit Amt field. If the period is the academic year, the amount should be the total for both terms.

e) Click the Finish button to enter the support and return to the Other Fellshp page. The Fall and Spring totals will be calculated automatically, based on the total amounts for the academic year.

4. When you have entered the non-adjustable fellowship, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

5. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

To add a special grant, award, or prize paid in one month:

1. Display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. Click the Non-adjustable Fellowship link to display the Other Fellshp page.

3. In the Special AY Fellowship Grant, Award, or Prize... area (at the bottom of the page), click the Add button to display the Add Period window.

   a) In the Month field, select the month when the award is paid from the drop-down list.
b) In the P/G field, type the seven-digit project/grant number to be charged, or double click to open the Find Project/Grant window. (See “Using the Find Project/Grant Window,” on page 172 for more information.)

c) In the Stip Amt field, type the amount of stipend to be paid in that month by the special award.

d) Click the Finish button to enter the support and return to the Other Fellowship page.

4. When you have entered the award or prize, you can return to the Graduate Student Support Summary page by clicking the Summary tab, where the award amount will be included in the non-adjustable fellowship stipend, or select another internal support type by clicking on the appropriate tab.

5. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

   If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**Removing a University Fellowship**

The only way to remove an adjustable University Fellowship is to provide enough support through other University awards or appointments to zero out the percentage for the adjustable fellowship. However, matching tuition and non-adjustable University Fellowships can be removed by zeroing out the commitments and recalculating.

**Adding and Deleting Distribution Periods**

You can add, change, or delete distribution periods for any earnings type. Each earnings type must have at least one distribution period, so if only one distribution period exists for an earnings type, it cannot be deleted.

If you are adding or removing a distribution period only to change to project/grant distributions, see “Adding or Changing Project/Grant Distributions,” on page 97.
To add distribution periods in a support type:

1. From the General Browse page, select the person you want to update by clicking the *Edit* button on that line. The Graduate Student Support Summary page appears.

2. Locate the earnings type that needs a new distribution period, and click on the link to open the page for that earnings type.

3. In the AY...Support Commitment area, click on the Add Period button. The Add Period window is displayed.

   **Tip! You can cancel the add by clicking on the Cancel button.**

4. In the *Begin Date* field, type the starting date for the new time period using the format *m/d/yyyy*, or double click in the field to display a calendar where you can select the date.

5. Click on the *Finish* button (or press the Tab and then the Enter key). The page will be redisplayed with the new distribution period using the percentages from the previous period. The end date of the new period is what was the end date of the previous period, and the end date of the previous period is the day before the beginning date you entered for the new period.

You must enter all 4 digits of the year

New period inserted with the same percentage
6. Change the percentage of support or make any adjustments needed for this earnings type in this period. For an AI, enter or change the *Hours of Activity* for the new period.

**Note:** If you know the dollar amount for the period, click the appropriate $ checkbox and type the amount in the *Salary Amt* or *Tuition Amt* field on the Adj line. The percentages of the standard commitment and the adjustment will be calculated for the period, based on the dollar amount you enter.

**Important!** *If you make an adjustment this way for an AI, be sure to correct the Hours of Activity values to match the recalculated Total Hours value. You will not be able to submit the changes if the hours do not match.*

7. When the support commitments are correct, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

8. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**To delete an existing distribution period:**

1. From the General Browse page, select the person you want to update by clicking the Edit button on that line. The Graduate Student Support Summary page appears.

2. Locate the earnings type for which a distribution period needs to be deleted, and click on the link to open the page for that earnings type.

**Note:** Deleting a distribution period for one earnings type may necessitate similar changes in another earnings type. Be sure to make all the necessary changes in all earnings types.
3. In the Support Commitment area, click on the Del. Period button. The Delete Period window is displayed.

**Note:** If there is only one period, it cannot be deleted; the Del. Period button will be disabled (indicated by a dimmed button).

** Tip! ** You can cancel this action by clicking on the Cancel button.

4. In the Begin Date field, select the beginning date of the period you want to remove from the drop-down list, and click the Finish button. You are returned to the page, and the distribution period is deleted. The previous distribution period is extended to the date when the deleted period ended, and the support commitments are recalculated.

5. If the support commitments for the remaining period(s) need to be changed, enter the desired values as described for adding the earnings type.

6. When the support commitments are correct, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

7. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.
Adding or Changing Project/Grant Distributions

Project/grant distributions can be added or changed by users who are authorized for that project/grant, or by users who are authorized for any department. If the user who makes the changes is not authorized for that project/grant, the changes are submitted for approval by the owner of the project/grant.

**Important! You will not be able to enter distributions for projects that are closed (that is, before the project open date or after the project close date). If the current date is after the project close date, you cannot enter distributions to that project, because it would require booking the changes after the close date.**

While you can change existing project/grant distributions, you cannot change the project/grant numbers. If an incorrect project/grant has been charged, you must zero out the distributions charged to that project/grant, click the Clean Data button to remove the project/grant, and then add the correct project/grant and its distributions.

**Note:** The Clean Data button will not remove the default project/grant line, even if it contains only zeros.

When you add a non-default project/grant, the default project/grant is adjusted automatically, so the total commitment remains the same. If a new project/grant provides additional support, resulting in a change in the total amount for the term, you must update the support commitments for the earnings type, adding a new distribution period if necessary. See “Adding and Deleting Distribution Periods,” on page 93 for instructions for adding distribution periods.

If you or a project owner reduces the commitment to a project/grant, the offset is moved to the default project/grant for that earnings type. Some default project/grants are funded project/grants, and you may leave the offset there. However, other project/grants, such as *nnn1998*, are not funded, and the offset should be moved to a funded project/grant before a payroll is charged.

If there are multiple project/grants, you can enter a value in the line for one project/grant and check the Bal checkbox in another line to distribute the remaining commitment to that project/grant, rather than to the default project/grant.
When adding a project/grant, you can look for the project/grant number using any of the following search criteria:

- The first several digits of the project/grant number. The resulting project/grant list will be limited to project/grants that begin with the specified digits.
- The department number of the department that owns the project/grant. This is also the first three characters of the project/grant number, and the resulting project/grant list will be limited to project/grants in the specified department.
- Sponsored projects. If you check this box, only sponsored projects will be listed.
- Primary Investigator. All projects with the specified P.I. will be listed.
- Fund. All project/grants that use this fund code will be listed.

If you select multiple search criteria, the resulting list will include only those project/grant numbers that match all of the specified criteria.

**To add a project/grant to an existing period:**

1. From the General Browse page, select the person you want to update by clicking the Edit Summary button on that line. The Graduate Student Support Summary page appears, showing the selected person's distributions.

2. Locate the earnings type that needs to be redistributed to a different project/grant, and click on the link for that earnings type.

3. On the earnings type page, click the Add P/G button in the AY Project Distribution area. The Find Project Grant window is displayed.
4. Enter the desired search criteria:
   
   **Begin**
   Enter the first several digits of the project/grant number. The resulting project/grant list will be limited to project/grants that begin with the specified digits.

   **Dept**
   Enter the department number of the department that owns the project/grant. The resulting project/grant list will be limited to project/grants in the specified department. You can list project/grants in any department, even those you are not authorized for.

   If you are authorized for only one department, that department will be displayed as the default search criteria, but you can change it, if necessary.

   **Sponsored Project**
   Click on this checkbox to list only sponsored projects (projects in the Fund 40 or 60 series).

   **P. I.**
   Select the primary investigator from the drop-down list. All projects with the specified P. I. will be listed. If you select ---- All ----, the list will not be filtered by P. I.

   **Fund**
   Select the desired fund code from the drop-down list. All project/grants that use this fund code will be listed. If you select ---- All ----, the list will not be filtered by fund code.

5. Select the desired project/grant number by scrolling through the list and clicking on the desired project/grant. Click the Finish button to add the new project/grant number.

   **Note:** If the desired project/grant is not included in the list, contact the Controller’s Office.
The earnings type page is redisplayed with a new line for the new project/grant.

**Note:** If you selected a project/grant that is closed for any portion of the distribution period, the project/grant is added, but the distribution period ends on the date when the project/grant is closed. Because the closed project/grant must have Distrib Amts of **0.00** (zero) in the period for which it is closed, an additional distribution period is added with zero amounts that cannot be changed for the closed project.

6. If you know the FTE percentage to be charged to the new project/grant for salary:

   a) Type the percentage of a full-time FTE to be charged to the project/grant in decimal format (50% is entered as **0.50**) in the Distrib FTE field.

   **Note:** If there are multiple project/grants, and you want to distribute the remaining commitment to a project/grant other than the default project/grant, check the **Bal** checkbox for the project/grant that is to receive the balance of the distributions.

   b) Click the **Calculate** button to calculate the Distrib % and Distrib Amt for the Salary, based on the Distrib FTE value.

If you know the dollar amount for the salary to be charged to the new project/grant:

   a) Click the $ checkbox under the Salary heading to open the Distrib Amt field for input.

   b) Type the salary amount to be charged to this project/grant in the Distrib Amt field.

   **Note:** If there are multiple project/grants, and you want to distribute the remaining commitment to a project/grant other than the default project/grant, check the **Bal** checkbox for the project/grant that is to receive the balance of the distributions.

   c) Click the **Calculate** button to calculate the Salary Distrib FTE and Distrib % values for all of the project/grants.
7. If the tuition to be charged to the new project/grant is the same percentage of the total distribution as the salary, click the Copy icon to carry the Distrib % value over to the Tuition area. Then click Calculate again to calculate the distributions for the tuition.

If the tuition will not be charged to the new project/grant at the same percentage as the salary, you can enter the Tuition Distrib %, or click the Tuition $ checkbox and enter the Tuition Distrib Amt. Then click Calculate again to calculate the distributions for the tuition.

**Note:** If there are multiple project/grants, and you want to distribute the remaining commitment to a project/grant other than the default project/grant, check the Bal checkbox for the project/grant that is to receive the balance of the distributions before you click the Calculate button.

8. When the distributions are correct, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

9. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

   If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**To change project/grant distributions without adding a new period:**

1. From the General Browse page, select the person you want to update by clicking the Edit Summary button on that line. The Graduate Student Support Summary page appears, showing the selected person's distributions.

2. Locate the earnings type that needs to be redistributed, and click on the link for that earnings type.
3. To change the salary distributions by percentage:

   a) Type the percentage of a full-time FTE to be charged to the
      project/grant in decimal format (50% is entered as 0.50) in the
      Distrib FTE field.

      Note: If there are multiple project/grants, and you want to
      distribute the remaining commitment to a project/grant other than
      the default project/grant, check the Bal checkbox for the
      project/grant that is to receive the balance of the distributions.

   b) Click the Calculate button to calculate the Distrib % and
      Distrib Amt for the Salary, based on the Distrib FTE value.

   To change the salary distributions by dollar amount:

   a) Click the $ checkbox under the Salary heading to open the Distrib
      Amt field for input.

   b) Type the salary amount to be charged to this project/grant in the
      Distrib Amt field.

      Note: If there are multiple project/grants, and you want to
      distribute the remaining commitment to a project/grant other than
      the default project/grant, check the Bal checkbox for the
      project/grant that is to receive the balance of the distributions.

   c) Click the Calculate button to calculate the Salary Distrib
      FTE and Distrib % values for all of the project/grants.

4. If the tuition is the same percentage of the total distribution as the
   salary, click the Copy icon to carry the Distrib % value over to the
   Tuition area. Then click Calculate again to recalculate the
   distributions for the tuition.

   If the tuition will not be charged at the same percentage as the salary,
   you can enter the Tuition Distrib %, or click the Tuition $ checkbox and
   enter the Tuition Distrib Amt. Then click Calculate again to
   recalculate the distributions for the tuition.

   Note: To distribute the remaining commitment to a project/grant
   other than the default project/grant, check the Bal checkbox for the
   project/grant that is to receive the balance of the distributions before
   you click the Calculate button.
5. When the distributions are correct, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

6. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

   If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**To delete a project/grant from a distribution period:**

1. From the General Browse page, select the person you want to update by clicking the Edit Summary button on that line. The Graduate Student Support Summary page appears, showing the selected person's distributions.

2. Locate the earnings type that needs to be redistributed, and click on the link for that earnings type.

3. Type zeros in the Salary Distrib FTE field and the Tuition Distrib % field for the project/grant you want to delete.

   **Note:** To distribute the remaining commitment to a project/grant other than the default project/grant, check the Bal checkbox for the project/grant that is to receive the balance of the distributions.

4. Click the Calculate button to zero out the remaining fields for the project/grant. The distributions will be re-allocated to the default project/grant, unless you check the Bal checkbox for another project/grant.

   **Note:** If the default project/grant is not funded, you should move the offset to a funded project/grant.

5. Click the Clean Data button to remove the zeroed out project/grant line.

6. When the distributions are correct, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.
7. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**Correcting Oversupport**

When the Graduate Student Support Summary page shows a negative number in the Unsupported Tuition line, the student is oversupported. You must decrease the internal support by the amount shown on the Unsupported Tuition line for each term. You can adjust the tuition in the Adjustable Fellowship, or by entering a negative number in the AI Adjustment, AR Adjustment, or AM Adjustment *Tuition & Fees* field.

*Tip! If you want to split the adjustment across more than one internal support type, it is easiest to change the assistanceships first, and then the Adjustable Fellowship.*

**To correct the assistanceships on the Graduate Student Support Summary page:**

1. To reduce the tuition support from a Standard AI, enter a minus sign followed by the amount by which you want to reduce the AI tuition in the *Tuition & Fees* field on the AI Adjustment line.

2. To reduce the tuition support from a Standard AR, enter a minus sign followed by the amount by which you want to reduce the AR tuition in the *Tuition & Fees* field on the AR Adjustment line.

3. To reduce the tuition support from a Standard AM, enter a minus sign followed by the amount by which you want to reduce the AM tuition in the *Tuition & Fees* field on the AM Adjustment line.

4. Click the Calc button at the bottom of the page to update the displayed totals.

**Note:** If more complex adjustments are required (for example, if the adjustment will require the addition of a distribution period, or a new project/grant), see the instructions for the earnings type that needs adjustment.
To correct the Adjustable Fellowship:

1. On the Graduate Student Support Summary page, click the Adjusted Fellowship link to display the Univ Fellshp page.

2. Click the Calc Tuition button in the middle of the page to recalculate the remaining tuition and adjust the tuition support amount accordingly.

3. Click the Summary tab to return to the Graduate Student Support Summary page. The tuition will be adjusted and the Unsupported Tuition line will display zeros for both terms.

Adding Summer Support

Summer support can be added under an AI, AR, or AM, or a standard University Fellowship. If a student is a VSRC (visiting research collaborator), tuition support may be required in the summer period as well.

To add summer support:

1. From the General Browse page, select the person you want to update by clicking the Edit Summary button on that line. The Graduate Student Support Summary page appears, showing the selected person's distributions.

2. Locate the earnings type that will supply the summer support, and click on the link for that earnings type.

3. In the Summer Support area of the earnings type page, click the Add button. The Add Summer Period window is displayed.

4. The Begin Date and End Date fields default to the dates for the complete summer period. If this is not what you want, enter the appropriate values:

   a) In the Begin Date field, type the date when summer support will begin, in m/d/yyyy format, or double click in the field to display a calendar window where you can select the desired date. (If you need instructions for using the calendar, see “Using the Calendar Window,” on page 171.)
b) In the *End Date* field, type the date when summer support will end, in *m/d/yyyy* format, or double click in the field to display a calendar window where you can select the desired date. (If you need instructions for using the calendar, see “Using the Calendar Window,” on page 171.)

5. In the *P/G* field, type the project/grant number if you know it, or double click to display the Find Project/Grant window. (If you need instructions on using the Find Project/Grant window, see “Using the Find Project/Grant Window,” on page 172.)

6. Type the amount of stipend to be charged to the project/grant for the entire period in the *Stip Amt* field.

7. If the student is a VSRC, type the amount of tuition support to be charged to the project/grant for the entire period in the *Tuit Amt* field.

8. Click the Finish button to add the summer support.

9. When you have made all the changes you need to make on this page, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

10. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

   If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.
Copying Distributions

You can copy distributions from one graduate student to another. Copying distributions is a two-step process, like a Windows copy and paste:

- First, you copy from the Graduate Student Support Summary page for the student with the distributions you want. All the distributions on the page are copied, even if they are not expanded.
- Then you copy those distributions to the student who requires the same commitments, specifying which year’s distributions to copy. If you are copying from a record with pending changes, you may specify whether you want to copy the distributions currently in effect, or the pending changes.

To copy distributions:

1. From the General Browse page, select the person you want to copy from by clicking the Edit Summary button on that line. The Graduate Student Support Summary page appears, showing the selected person's distributions.

2. Make any changes that are required for both students.

3. Click the Copy From button. When the message Copy From has been set up successfully appears, click the OK button to continue. All distributions for the selected person have been copied.

4. Return to the Personnel list on the General Browse page by clicking the Save or Submit button if you have made changes, or the Quit Edit button if you have made no changes.

5. Select the person who should have the same distributions by clicking the Edit Summary button on the line for that student. The Graduate Student Support Summary page appears, showing the selected person's distributions.

6. Click the Copy To button. The Copy To window is displayed.
7. Verify that you are copying the information from the student you copied from in Step 3.

8. Select the academic year of the distributions you want to copy, by clicking on the radio button before the year.

9. If you are copying from a record with pending changes, select the distributions you want to copy by clicking on the radio button.

   - **In Effect** to copy the distributions currently in effect
   - **Pending** to copy the distributions that are pending approval

10. Click the Finish button to copy the distributions.

11. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

    If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.
Copying from the Contract

When the graduate student has accepted and signed the contract, you can load the contract data directly into Labor Accounting. The total support awarded in the contract is loaded into the Adjustable University Fellowship. You may redistribute the internal support if the student receives an AI, AR, or AM appointment. Labor Accounting will automatically adjust the support charged to the University Fellowship as you add or remove additional appointments.

To copy support totals from the contract:

1. From the General Browse page, select the person you want to update by clicking the Edit Summary button on that line. The Graduate Student Support Summary page appears, showing the selected person's distributions.

2. Click the Contract button (in the first set of buttons at the bottom of the page). A message window displays 200x contract data loaded.

3. Click the OK button to return to the Graduate Student Support Summary page. The contracted support totals for stipend/salary and tuition will be displayed in blue on the Adjustable Fellowship line.

   Note: If the contract includes summer support, you will find it in the next fiscal year, since the contract covers September through the following August.

4. Make any other changes that are required for the types of support the student will receive, using the detail pages as needed.

5. When you have made all the required changes, save or submit your changes as described in “Saving and Authorizing Changes,” on page 166.
Chapter 4: Maintaining Graduate Student Support

Terminating Support for Students Who Leave

Terminating support for a student in Labor Accounting involves the following steps:

- Capturing the enrollment event or Student Administration status change.
- Recalculating the tuition payment, which is pro-rated based on the number of days the student was enrolled as an active student. (The actual amount due comes from the Entitlement Table, which shows how much tuition Princeton is entitled to for the number of days the student was enrolled.)
- Zeroing out support in the earnings period beginning with the termination date for each of the student’s appointments (AI, AR, or AM).

To terminate support:

1. From the General Browse page, select the person you want to terminate by clicking the Edit Summary button on that line. The Graduate Student Support Summary page appears, showing the selected person’s distributions.

2. Click the Total Tuition & Fees link to display the Graduate Student Tuition page.

3. If the Student Administration data shows the termination, you can click the Match LA to SA button to capture the termination in Labor Accounting.

   If the Student Administration data does not show the termination yet, you can add the enrollment event yourself:

   a) Click the Add LA Period button.

   b) In the Begin Date field, type the date of the termination in m/d/yyyy format, or double click to open the Calendar window, where you can select the date. (If you need instructions on using the calendar window, see “Using the Calendar Window,” on page 171.)

   c) In the Enr. Event field, select TRM or WTH from the drop-down list.

   d) Click Finish to return to the Graduate Student Tuition page.
4. If the student has terminated before the beginning of the Spring term, change the *Enroll Event* for the Spring term by selecting **TRM** or **WTH** from the drop-down list, using the same value as in Step c, above.

5. Click the **Calc Tuit Amts** button to recalculate the tuition owed to the University.

   **Note:** If the amount of tuition owed to the University is not the standard amount from the Entitlement Table, check with the Graduate School Budget Office before proceeding further. If they authorize the change, type the difference in the *Adj* field for the new period.

6. If the student had an AI appointment, click on the Asst Instr tab to display the Asst Instr page.

   a) In the new period (after the termination), zero out the *Hours of Activity* and any values in the Adj line.

   b) Click the **Calculate** button to recalculate the AI support.

7. If the student had an AR appointment, click on the Asst Research tab to display the Asst Research page.

   a) In the new period (after the termination), zero out the *Total Pct* and any values in the Adj line.

   b) Click the **Calculate** button to recalculate the AI support.

8. If the student had an AM appointment, click on the Asst Master tab to display the Asst Master page.

   a) In the new period (after the termination), zero out the *Total Pct* and any values in the Adj line.

   b) Click the **Calculate** button to recalculate the AI support.

9. Click the Summary tab to display the Graduate Student Support Summary page.

10. To save your changes and submit them for approval, click the **Submit** button on the Graduate Student Support Summary page.

    If you are not ready to submit the changes for approval, click the **Save** button. The record will be locked to other users for 24 hours.