Processing Summer Quarter Aid in GFS

What’s different from the rest of the year?

Presented by:

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Financial Aid Office
Agenda

- Summer Qtr Assistantships
  - Enrollment Requirements
  - Appointment %
  - Tuition and TAL

- Aid for students not enrolled

- Summer Qtr Health Insurance Subsidy

- Summer Qtr Deadlines
Summer Quarter Assistantships: Enrollment Issues

- GFS Policy Manual regarding Enrollment:
  - In Summer Quarter, students may hold assistantship appointments up to 90% FTE. Students must be enrolled for at least 1-3 units in order to hold a Summer Quarter assistantship.
  - 100% appointments will be considered as temporary employment, rather than as a student assistantship, and will not carry any tuition allowance. (Not processed in GFS; Paid through HRMS as a temporary employee)
Enrollment Issues: What to do in PeopleSoft

- Enrollment requirement for automatic disbursement IS DIFFERENT than during Aut/Win/Spr
  - Disbursement will happen automatically if the student is enrolled $\geq 1$ unit (or TGR) so you don’t need to do anything!
  - Override for Stipends by Home Dept Approver is only required if student is not enrolled
Summer Quarter Assistantships: What to do in PeopleSoft

- When entering an assistantship, will default to 12 weeks
  - Before saving, enter Termination Date for shorter duration
- Detailed instructions in Job Aid at:
Summer Quarter Assistantships: What to do in PeopleSoft

- TAL will default based on % appointment
- Multiple appointments do not automatically reduce TAL amount
- Override may be necessary to avoid unapplied aid

<table>
<thead>
<tr>
<th>% Appt - Any Quarter</th>
<th>% Appt - Summer Qtr Only *</th>
<th>Tuition Allowance Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>15</td>
<td>85+</td>
<td>1, 2, or 3 units</td>
</tr>
<tr>
<td>20</td>
<td>80</td>
<td>4 units</td>
</tr>
<tr>
<td>25</td>
<td>75</td>
<td>5 units</td>
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<tr>
<td>30</td>
<td>70</td>
<td>6 units</td>
</tr>
<tr>
<td>35</td>
<td>65</td>
<td>7 units</td>
</tr>
<tr>
<td>50</td>
<td>60</td>
<td>8, 9, or 10 units</td>
</tr>
<tr>
<td>40 plus 10</td>
<td></td>
<td>8, 9, or 10 units</td>
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</table>

* Default Amount for 1 Assistantship
TAL Override Demonstration

<table>
<thead>
<tr>
<th>Aid Seq</th>
<th>Ident</th>
<th>*Pay Org</th>
<th>Job #</th>
<th>Appt Hrs</th>
<th>School Cd</th>
<th>Disb Plan</th>
<th>TAL Calc Total</th>
<th>Awarded Total</th>
<th>Detail</th>
<th>Status</th>
<th>Description</th>
<th>Approval Status</th>
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</thead>
<tbody>
<tr>
<td>TAL001</td>
<td>Dumbledore</td>
<td>PAAA</td>
<td>AST001</td>
<td>14.00</td>
<td>H&amp;S</td>
<td>Qtr Smir</td>
<td>4753.00</td>
<td>4753.00</td>
<td>Detail</td>
<td>P</td>
<td>Pending</td>
<td>Pending</td>
</tr>
<tr>
<td>TAL002</td>
<td>McGonagall</td>
<td>PAAA</td>
<td>AST002</td>
<td>14.00</td>
<td>H&amp;S</td>
<td>Qtr Smir</td>
<td>4753.00</td>
<td>4753.00</td>
<td>Detail</td>
<td>P</td>
<td>Pending</td>
<td>Pending</td>
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</table>

Save  Return to Search

FLSHP Stipend  FLSHP Tuition  Assist Salary  Assist TAL  Work Panel
## TAL Detail

<table>
<thead>
<tr>
<th>Aid Year</th>
<th>Aid Sect</th>
<th>Amount</th>
<th>Fund Src</th>
<th>Item Type</th>
<th>Project</th>
<th>Task</th>
<th>Award</th>
<th>Expend Type</th>
<th>Deptid (Task Org)</th>
<th>Charge Priority</th>
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<tbody>
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<td>TAL001</td>
<td>1545.00</td>
<td>School</td>
<td>843200000000000</td>
<td>1028946</td>
<td>1</td>
<td>AABOK</td>
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<td>ADB01</td>
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<td>51075</td>
<td>ZZYA</td>
<td>TU_ONLY</td>
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</tbody>
</table>

### Term Distribution

**Term**: 1068 05-06 Summer
**TAL Category**: CR

- **Overides**:
  - Allocation
  - Calculated Term TAL Amt: 4753.00
  - Awarded Term TAL Amt: 2377.00
- **Override Rsn**: Unit adj
Aid for students who are not enrolled

- Some departments allow summer funding to students not currently enrolled, others do not.
- Enter as usual with “Stipend” charge priority.
- Home Department approver must override enrollment requirement.
- Funds will be sent to student’s mailing address by SFS (direct deposit available if student has signed up via Axess).
Health Insurance Subsidy: Facts

- Eligibility requirements don’t change
- Automatic Health Insurance process will determine eligibility
- Deadline usually earlier than the 3rd week of the quarter because of shorter billing cycle
Health Insurance Subsidy: Eligibility Criteria

- Enrolled Graduate Students who do not waive cardinal care
- Full Subsidy if employed as 25% RA/TA or higher OR receiving $2,000 in fellowship stipend ($300 in 2005-2006)
- Partial Subsidy if employed <25% RA/TA OR receiving >$1,000 but <$2,000 in fellowship stipend ($150 in 2005-2006)
- Also qualify for dependent health insurance benefit (no cost for full subsidy recipients, $70/qtr for partial subsidy recipients, $140/qtr for those not eligible for subsidy)
Health Insurance Subsidy: Caveats

- If not enrolled, won’t automatically be charged for health insurance (students can arrange “un-enrolled” health insurance with Vaden)

- Subsidy will not pay “un-enrolled” health insurance (dept payments with Health Insurance – HLTHONLY - charge priority will)

- Change from previous years – process will assign eligibility if student eligible based on aid received. Will not disburse if student not enrolled.
For more information...

- GFS Policy Manual

- PeopleSoft Training/Job Aids

- Financial Aid Office
  - http://financialaid.stanford.edu/staff/5_1_gradadmin.html
Questions