



Welcome

Graduate Assistant Employment Workshop

February 15, 2017

HR Academic and Student Personnel



Agenda for the Morning

1. Introductions
2. Website
3. Graduate Student Admission Letter
 - Without Funding as a Graduate Assistant
 - With Funding as a Graduate Assistant
4. Letter of Appointment for Graduate Assistants
5. Common ePAF problems
6. Graduate Assistant hire paperwork
7. Fellowship payments



New Website

- Recruitment & Staffing
 - Current UF Employees
 - Hiring Center**
 - Institutional Equity & Diversity
 - Immigration Compliance Services
- Classification & Compensation
- Employee Relations
- Leave Administration
- Training & Organizational Development
- HRS Administration & Services
- Policies
- Forms

Hiring Center

This webpage is designed as a portal to guidelines and resources to help you effectively and efficiently recruit, hire and manage changes to an employee's status while working at the University of Florida. Click on each section to view the guidelines and resources available.

Step 1 Advertising the Job

Review this section to locate resources regarding the posting of job requisitions for faculty, staff (TEAMS and OPS), graduate assistants, student hires, etc.

Step 2 Managing Applications

Need help in reviewing applications? Visit this section for resources on evaluating your applicant pool.

Step 3 Selecting Candidates

In this section, find guidelines to help prepare for interviewing selected candidates.

Step 4 Preparing an Offer

Once the final candidate is selected, review this section for the necessary steps to offer the position.

Step 5 Creating an Appointment

Locate information on how to enter an appointment for all new hires and fellows.

Current Employee Status Changes

UF employees may have additional status changes during their time at UF. Find helpful resources in this section.



Appointment Letters

Now Required by HR for all Hire and Job Edit ePAFs

- Use the template letters found on the Academic Personnel website
 - Created by mutual agreement between the Graduate School and Graduate Assistants United (GAU) union
- This is a contract
- Changes to contract must have an addendum letter signed by the student



GRADUATE STUDENT ADMISSION LETTER WITHOUT FUNDING AS A GRADUATE ASSISTANT

1. Use this template for graduate students you want to admit into your degree program but DO NOT plan to immediately offer an appointment for graduate assistant (RA, TA, GA) employment.

2. Awards not related to a work assignment such as scholarships and fellowships, etc., can be included in this letter.

3. Add other information that may be pertinent to the admission of the student.

4. Remove language from header and footer.

[date]

[name]
[address]

Dear [name]:

Congratulations! I am pleased to offer you [insert conditional admission language if applicable] admission into the [major] [specify degree – Master’s, Ph.D., etc.] at the University of Florida, Department of [unit] beginning [semester and year].

The University of Florida participates in the Council of Graduate School’s resolution regarding acceptance of an offer of financial support. The resolution can be viewed at <http://www.cgsnet.org/april-15-resolution>. It indicates that you are not required to provide a formal response to this offer prior to April 15, although you are certainly free to do so. [Use the prior language if offering scholarship, fellowship or other type of financial assistant that is not a graduate assistantship of employment] Please sign, date and return to me at your earliest convenience, but not later than [insert any date after April 15].

[Insert language regarding scholarships, fellowships, etc. if applicable]

The University of Florida has a mandatory health insurance requirement for all newly admitted or re-admitted students who are enrolled at least half time in a degree-seeking program and are attending any campus of the University of Florida. More information can be found at the following website: <http://studentinsurance.shcc.ufl.edu/>

Students are the lifeblood of the University of Florida’s graduate programs. Your successful academic and personal growth through education and research at the University of Florida are a critical part of our mission and priorities. Therefore, I hope that you will accept our offer of admission and look forward to meeting you on [Date]. Please contact me at [352- ###-####] or by e-mail at [###.ufl.edu] if you have questions about this offer or the program, or visit our [graduate student handbook at the following link -- department should add more information specific to their program].

Sincerely,

[From Name]

Signature of Applicant

Name

Date



GRADUATE STUDENT ADMISSION LETTER WITH FUNDING AS A GRADUATE ASSISTANT

1. Use this template for students you want to admit into your degree program AND offer financial support through employment as a graduate assistant (TA, RA, or GA).
2. Add other information that may be pertinent to the admission of the student.
3. Awards not related to a work assignment such as scholarships and fellowships, etc., can be included in this letter.
4. The details of the proposed GA appointment should be described in a separate letter of appointment.
5. If more than one academic or administrative unit are making commitments for employment, two separate Letters of Appointment should be provided to the student.
6. Remove language from header and footer.

[date]

[name]
[address]

Dear [name]:

Congratulations! I am pleased to offer you [insert condition admission language if applicable] admission into the [major] [specify degree – Master's, Ph.D., etc.] at the University of Florida, Department of [unit] beginning [semester and year]. In addition to an invitation to join our academic program, we would like to offer you an appointment as a [include title of position and all available details with regards to the appointment and anticipated work assignment]. Pending academic success in the program, we are committed to provide funding for [indicate number of years of commitment] years. The specific details for each year's graduate assistant appointment and work assignment will be provided in a separate Letter of Appointment.

Attached please find your Letter of Appointment that provides details about this funding offer for the [academic or calendar year dates]. [Include this sentence if you are sending the Letter of Appointment or other documents with this letter]

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The University of Florida participates in the Council of Graduate School's resolution regarding acceptance of an offer of financial support. The resolution can be viewed at <http://www.cgsnet.org/april-15-resolution>. It indicates that you are not required to provide a formal response to this offer prior to April 15, although you are certainly free to do so. Please sign, date and return both letters to me at your earliest convenience, but not later than [insert any date after April 15].

Students are the lifeblood of the University of Florida's graduate programs. Your successful academic and personal growth through education and research at the University of Florida are a critical part of our mission and priorities. Therefore, I hope that you will accept our offers of admission and financial support. I look forward to meeting you [include specific information about upcoming events or meetings]. Please contact me at [352- ###-####] or by e-mail at [###.ufl.edu] if you have questions about this offer or the program. I also recommend you visit our [graduate student handbook at the following link -- department should add more information specific to their program].

Sincerely,

Name

Enclosure

Signature from Applicant

(Students Name)

Date



Template - Letter of Appointment for Employment for Graduate Assistant

Letter of Appointment for Employment

Last Updated: February 7, 2017

Date :

Name of Appointee:

UFID:

Title:

Employing Department/Unit:

FTE:

Annual [or Academic] Rate of Pay:

Bi Weekly Rate of Pay:

Begin Date:

End Date:

Evaluation Date:

Special Conditions:

http://hr.ufl.edu/wp-content/uploads/docs/RecruitmentStaffing/ga_employmnt_apptletter.docx



Terminating Appointments

- When terminating a GA appointment you must be careful not to term before the end of the academic semester due to the waiver. If you do that, the waiver will not pay out.
- If you have to term a GA before the end of the term, please contact Academic Personnel for guidance.



PRINCIPLES FOR EMPLOYING GRADUATE STUDENTS

Most appointments are at 0.25 or 0.33 FTE and fit well with the department, but the preferred appointment is at 0.50 FTE. A graduate assistant must be appointed at .25 fte or greater to be eligible for a tuition waiver.

- Graduate assistant appointments at an FTE less than 0.25 will require justification on a case by case basis and will require the endorsement of the Graduate School, through the petition process.

Graduate Assistants are contracted exempt employees who are compensated by salary. Distinct from student assistants, who are hourly employees, and may work and be paid “as needed basis”.

In some circumstances, it is permissible to hire graduate students in the salary plan of student assistant. The duties for such positions should be **clear and distinct** from those of a graduate assistant.

Examples of tasks that may help distinguish that of a graduate assistant from a student assistant:

Teaching assistant tasks:

- Lecture
- Preparing syllabus
- Grade papers or assignments
- Holding office hours for meeting with students



PRINCIPLES FOR EMPLOYING GRADUATE STUDENTS

Research assistant tasks:

- Conduct laboratory procedures
- Design experiments
- Observe or interview research subjects
- Co-author research papers, prepare or edit research papers/manuscripts

Examples of tasks performed by student assistants:

- Department website support/routine support of laboratory activities
- Clerical duties, such as photocopying or errands
- Food service activities
- Supervisory roles in residence halls

For more student assistant tasks, please visit this link: http://hr.ufl.edu/wp-content/uploads/docs/JobClassifications_StartingPayRanges.pdf

Exceptions to basic policies due to special circumstances must be documented and must be approved by the Graduate School through the petition process.



Requirements to be a GA

- Classified as a Graduate Student
- GPA – 3.0 or higher
- Proper Registration per combined FTE
- Proper title chosen for work being done
- Minimum salary met
- Registration requirements can be found at <http://gradcatalog.ufl.edu> and Academic Personnel Office: <http://hr.ufl.edu/manager-resources/recruitment-staffing/hiring-center/preparing-an-offer/requirements-for-an-appointment/#gradstudent>



Requirements

- To waive requirements, petition the graduate school - <http://graduateschool.ufl.edu/faculty--staff/resources/petition-guidelines/>
- Change for Graduate Assistant at .01 to .24 FTE – registration for 12 hrs. with no waiver and petition required by Graduate School for this type of appointment.



Process GA Appointment

- Process the ePAF
- Enter the Tuition Waiver (LOA)
- Enter Payroll Distribution
(Commitment Accounting)



GA Appointment Changes

Remember: signed addendum needed for HR approvals

- When an appointment changes
 - Rate change
 - Requires change in duties or responsibilities
 - Change in FTE
 - FTE changes must have corresponding and proportional change in salary up or down, unless duties or responsibilities change



GA Appointment Changes

- When an appointment changes
 - Change in title
 - Need appropriate student classification
 - Reminder:** teaching titles require international students (from non-English speaking countries) to pass the Test for Spoken English (TSE)
 - NOTE: If you are changing a Salary Plan from STAS to GA or GA to STAS, do not use a Job Edit ePaf. Use a Hire ePaf and check *Leaving Another Job*.



- When making a change on any GA or Fellow appointment do the following:
 - Always use the COMMENT section of the ePAF to communicate what you are attempting to do with that ePAF. This would reduce the need for RECYCLING.
 - Examples are:
 - Change in title
 - Change in FTE
 - Change in salary
 - Change department ID
 - Terminating before end of term



Grad Assistant Hire Paperwork

- All US Citizens and Permanent Residents must use GatorStart portal to fill out hiring paperwork – the following must be attached to the ePAF
 - Notarized Loyalty Oath and Intellectual Property Agreement
 - I-9 supporting documents, i.e., driver's license and Social Security card or US passport, Permanent Resident card, or US Naturalization certificate
 - Selective Service Registration (males 18-25)

If Fellowship appointment is the only active appointment in Job Data, GatorStart will need to be manually created. Please call 392-2477.



Grad Assistant Hire Paperwork

- Required paperwork for Foreign Nationals
 - I-9 form – filled out per federal guidelines
 - Windstar form from Tax Services
 - W-4 – all necessary boxes filled out, signed, dated
 - Direct deposit form – with voided check or bank letter
 - Social Security Card
 - Passport
 - Visa
 - I-94
 - I-20 or DS-2019 (if F1 or J1 visa holder)
 - Notarized 4n1 form (HR50 – includes Loyalty Oath, Intellectual Property Agreement, Veteran Survey, Ethnicity and Race Form)
 - Marketplace Acknowledgment form
 - Invitation to Self Identify form



Common ePAF Problems

- Don't get an ePAF denied or recycled for these reasons!
 - Missing required paperwork or GatorStart not complete
 - NOTE:** For GA's who have nothing but a fellowship payment in PS and moving to a graduate assistant appointment, you need to notify Academic Personnel to create a GatorStart packet for US citizens.
 - FICA Status (needs to be exempt)
 - Wrong job code – ePAF code should match the title in the letter
 - Incorrect comp rate – must be what is on the letter of offer and if change in FTE, must be proportional.
 - Combined FTE is over 0.50 for Foreign National
 - Not registered properly per FTE
 - Ensure that this ePAF action has not already been processed in job data
 - Effective date is wrong on the ePAF – does not match offer



Common ePAF Problems

- Don't get an ePAF denied or recycled for these reasons!
 - 4 in 1 form not completed accurately, example: employee signature date and the notary signature date are two different dates.
 - No current signed letter attached to ePAF
 - For GA one time payments ePAF – the effective date needs to be in the current pay period and not a past pay period.
 - FTE should be 2 decimal places only – not .25255, but .25 FTE, because PeopleSoft will round up and the comp rate could be incorrect.



Common ePAF Problems

- Don't get an ePAF denied or recycled for these reasons!
 - Letter of appointment for hire issues:
 - Job title in letter and ePAF do not match
 - FTE in letter and ePAF do not match
 - Combining two titles in letter of offer and not relaying in the comment section of ePAF. Ex: GA and Fellow (GSF)
 - Date ranges are not the academic year dates (needed for tuition waiver)
 - Increase in pay but not change in FTE – enter in comment section why this is being done – most common is unit has now increased their GA stipend for the new year or new contract for new academic year



New 1-9



Common ePAF Problems for I-9

- Don't get an ePAF denied or recycled for these reasons!
 - Effective 1/22/2017, Department of Homeland Security issued a new I-9, which is now required for ePAF approval.
<https://www.uscis.gov/sites/default/files/files/form/i-9.pdf>
 - Old I-9s will not be accepted
 - I-9 issues
 - Not putting N/A in the “other name” space in Section 1 as per Department of Homeland Security. If any space is left blank, please put “N/A”
 - Make sure to check whether or not you were a preparer/translator for the employee
 - I-9 issues: Section 2 for foreign national hires, List A documents should be passport, I-20 and the I-94 (all three), and expiration date for I-94 should be D/S (duration of stay)
 - Watch signature date that the employee puts on the I-9. A common issue is putting their date of birth and not the date signed.



Common ePAF Problems for I-9

- Don't get an ePAF denied or recycled for these reasons!
 - In section 2, at the top of the page under Citizenship/Immigration status, enter the box number checked in section 1
 - In the Certification section, post office box addresses are no longer allowed. Please use physical address.
 - Any correction made in Section 1 must be initialed and dated by the employee – can use a translator as needed
 - **DO NOT use a paper I-9 when hiring a US citizen. The I-9 is completed via GatorStart.**



Common Fellowship ePAF Problems

- Don't get an ePAF denied or recycled for these reasons!
 - Fellow payments – Processing a retro payment and not calculating the retro payment accurately. Late appointments cause issues with additional pay. Additional pay does not retro.
 - Memorandum of Understanding (MOU) – not completed accurately.
 - Example: Page 2 of the MOU is missing or not initialed by the student.
 - No I-9 needed for FELLOWS- we don't recycle but not needed
 - FTE and standard hours not correct – should be .05 for standard hours with FTE to be .00 on the ePAF



Fellowship Memorandum Of Understanding

(updated July 2015)

Name UFID

College Department

Department Phone Number Pre-Doc Fellow Post-Doc Fellow

Appointment Dates (follow academic calendar as applicable; not to exceed 1 year): Start End

UF Contract/Project Number: Agency Grant Number

Federal Funding (e.g. T32) NO YES
If yes, appointment must be reviewed by Contracts and Grants prior to being submitted to HR-Academic Personnel

Primary Funding Source: Amount \$ Fund Code

Supplementary Funding Source: Amount \$ Fund Code

Total Stipend for Appointment: \$

1. First Payment-LSP (if applicable)	\$ <input type="text"/>
2. Biweekly Amount:	\$ <input type="text"/>
Goal Amount:	\$ <input type="text"/>

Fellow Acknowledgement

- I understand that I must be properly registered for the credit hours needed to be eligible for the fellowship, if required.
- I further understand I am not a University of Florida employee and I am not covered under worker's compensation.
- If I am a U.S. Citizen or permanent resident, my stipend is not subject to any payroll tax withholding requirements.
- I understand I am responsible for determining whether my award, in whole or part, is to be included in gross income, and for paying appropriate taxes, if applicable.
- If I am a foreign national with F-1/J-1 visa status, I understand that because I am not a U.S. citizen, payments to me are governed by my visa status, U.S. tax laws, and/or the tax treaty between the U.S. and my country of residence.
- I understand that the University of Florida, the authorizing agent, will issue a Form IRS 1042S annually. I also understand that it is my responsibility to file IRS Form 1040NR or 1040NR-EZ each calendar year. Furthermore, I understand that failure to file this U.S. tax return may disqualify me for receipt of monies under this or other programs.
- I have received a copy of the second page of this memorandum.

REQUIRED (Please 'X' the appropriate selection)
For tax purposes, I am a: Nonresident Alien (NRA) U.S. Citizen/Resident Alien

Fellow Signature Date

Departmental Acknowledgement

- I have read the above information and I understand and acknowledge that fellowships are awarded to aid the fellow in the pursuit of study or research and that no services are expected.
- I certify the fellowship recipient named above is not expected to perform services as a condition of this award.

Chair, PI, or Graduate Coordinator (no delegate allowed) Date

Name: (Page 2) Initial:

Fellowship Definition: A fellowship grant generally means an amount paid or allowed to, or for the benefit of, an individual to aid the fellow in the pursuit of study or research. The term includes the value of contributed services and accommodations and the amount of tuition, matriculation, and other fees, which are furnished or remitted to an individual to aid in the pursuit of study or research.

Registration: There are registration requirements for pre-doctoral fellows receiving stipends. Post-doctoral fellows are not required to register. Registration requirements are published in the UF Graduate Catalog.

Taxability of Stipends: Section 117 of the Internal Revenue Code applies to the tax treatment of scholarships and fellowships. Degree candidates may exclude from gross income (for tax purposes) any amount used for course tuition and related expenses, such as fees, books, supplies, and equipment, required for courses of instruction at a qualified educational organization. The taxability of stipends in no way alters the relationship between fellows and grantee organizations. Fellowship stipends are not considered salaries. Interpretation and implementation of tax law is the domain of the IRS and the courts. The University of Florida and/or the granting agency does not have the authority to dispense tax advice. Individuals should consult their local IRS office about the applicability of the law to their situation and for information on their tax obligations.

If you are a U.S. citizen or a foreign national with lawful permanent resident status and are not required to perform any services for the university or the grantor in return for your fellowship or scholarship award, the university is not required to withhold taxes on your award. You are responsible for determining whether your award, in whole or part, is to be included in gross income, and for paying appropriate taxes on it.

Foreign National Taxability: Foreign students, F-1 and J-1 visa holders, may be subject to withholding even on amounts which do not represent compensation for services. This is to ensure compliance with U.S. laws on the part of individuals who are not permanent residents of this country. In general, if an amount paid through the payroll system to a nonresident foreign national is taxable, it is subject to withholding. Some foreign students may be exempt from U.S. withholding taxes under one or more provisions of a tax treaty, which their home country has secured with the United States. Your visa status and country of residence requires that payments to you meet certain conditions.

Form 1098T or Form 1099: Although stipends are not considered salaries, the payments may be subject to Federal and State taxes. The University of Florida is required to report your fellowship payment on IRS Form 1098-T or 1099 MISC for NIH Training Grant Fellowships. As stated previously, you are responsible for determining whether your award, in whole or part, is to be included in gross income, and for paying appropriate taxes.

Worker's Compensation: Since services are not required and no employment relationship exists between you and the University of Florida, you are not covered under worker's compensation (F.S. 440.02).

Direct Deposit: Direct deposit is available and encouraged for individuals receiving fellowship stipends. Should you chose not participate in direct deposit, your payment will be forwarded to the office responsible for funding the fellowship.



Fellow Paperwork

- Required paperwork for Foreign Nationals
 - Windstar form from Tax Services
 - Direct deposit form – with voided check or bank letter
 - Social Security Card
 - Passport
 - I-94
 - I-20 or DS-2019 (if F1 or J1 visa holder)
 - Notarized 4n1 form (HR50 – includes Loyalty Oath, Intellectual Property Agreement, Veteran Survey, Ethnicity and Race Form)
 - Memorandum of Understanding (MOU)



Fellow Paperwork

- Fellow payments for US citizens and Permanent Residents:
- They do NOT go through Gator Start so paperwork is needed:
 - Memorandum of Understanding (MOU)
 - Notarized 4n1 form (HR50 – includes Loyalty Oath, Intellectual Property Agreement, Veteran Survey, Ethnicity and Race Form)
 - Direct Deposit Form – with voided check or bank letter



Hire Effective Dates

- Always use academic calendar dates as set by the Provost (see Academic Personnel website)
 - <http://hr.ufl.edu/manager-resources/recruitment-staffing/hiring-center/preparing-an-offer/requirements-for-an-appointment/#academic>
- New hire paperwork must be completed for any hire, either new or a rehire with a break in service of one day or more – including GatorStart packets



QUESTIONS/DISCUSSION





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Grad Student Appointments

Fellowships

Student Assistants

Faculty

I-9 Management & E-verify