Fee Remission Process

Graduate Division  Spring 2015
<table>
<thead>
<tr>
<th>Agenda</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fee Remission Background</td>
</tr>
<tr>
<td>Eligibility and Roles and Responsibilities</td>
</tr>
<tr>
<td>How a remission is created and a student’s account is paid</td>
</tr>
<tr>
<td>How chart strings are charged/Adjustments</td>
</tr>
<tr>
<td>Transmission file to payroll timing and schedule</td>
</tr>
<tr>
<td>Updates and Questions</td>
</tr>
</tbody>
</table>
Learning Objectives

1. Increase general knowledge and familiarity with the way fee remissions are generated and charged to departmental chart strings.

2. Understand the timing and where to look for charges and adjustments.
Terminology

Decoding the acronyms

- **HCM** – Human Capital Management – the HR database
- **CARS** – Campus Accounts Receivable System (for student tuition and fee assessment and payments).
- **LBNL** – Lawrence Berkeley National Lab, UC manages the lab and many PI’s have funds associated with the Lab, however they keep separate ledgers.
- **GLOW** – Gradlink on the Web, Graduate Division’s online student database.
- **PPS** – Payroll Production System
- **NRST** – Non-Resident Supplemental Tuition
What Is A Fee Remission?

Fee Remission = Benefit of Employment

For *qualifying* GSR, GSI, AI-GS, Reader or Tutor appointments.

Fee Remission awards apply towards a student’s CARS account for specific tuition and fees assessed by Office of the Registrar.
Tuition & Fee Dollar Amounts
Where to Look?

2014-2015 Registration Fees
ALL FEES ARE SUBJECT TO CHANGE.
The tuition, fees, and charges posted here are estimates based on currently approved amounts. These figures are not final. Actual tuition, fees, and charges are subject to change by the Regents of the University of California and could be affected by state funding reductions. Accordingly, final approved levels (and thus a student’s final balance due) may differ from the amounts shown.

2014-2015 FEE SCHEDULE
(note: fees are per semester)

<table>
<thead>
<tr>
<th>Type of Student</th>
<th>Residents</th>
<th>Nonresidents</th>
<th>Residents</th>
<th>Nonresidents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Services Fee</td>
<td>495.00</td>
<td>495.00</td>
<td>495.00</td>
<td>495.00</td>
</tr>
<tr>
<td>Berkeley Campus Fee</td>
<td>369.75</td>
<td>369.75</td>
<td>369.75</td>
<td>369.75</td>
</tr>
<tr>
<td>Class Fees - Transit</td>
<td>70.00</td>
<td>70.00</td>
<td>70.00</td>
<td>70.00</td>
</tr>
<tr>
<td>Health Insurance Fee</td>
<td>1,050.00</td>
<td>1,050.00</td>
<td>1,050.00</td>
<td>1,050.00</td>
</tr>
<tr>
<td>Nonresident Supplemental Tuition</td>
<td>N/A</td>
<td>11,439.00</td>
<td>N/A</td>
<td>11,439.00</td>
</tr>
<tr>
<td>Document Management Fee</td>
<td>175.00</td>
<td>175.00</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

On this page
- Undergraduate
- Graduate Academic
- Interdisciplinary
- Doctoral
- Research
- Military
- Fee Schedule Archive

Quick Links
- UC Berkeley
- Office of the Registrar
- Student Affairs
- Academic Affairs
- Campus Services
- Faculty Affairs
- Staff Resources
- About UC Berkeley
- Visit UC Berkeley
- Directions
- Contact Us
- Accessibility

Tuition & Fee Dollar Amounts
Where to Look?
1. Eligibility dates for Academic Year (Fall/Spring)

2. Types of Fee Remissions

3. Title Codes for Fee Remission Types

4. Eligibility Requirements Fee Remission Types

5. Fees/Tuition Covered by Type of Fee Remission

6. Notes
Who Does What?
## Roles and Responsibilities

<table>
<thead>
<tr>
<th>Department/Hiring unit/ CSS HR</th>
<th>Graduate Division</th>
<th>Central Payroll</th>
<th>Departments/Fund Managers</th>
</tr>
</thead>
</table>
| • Hire/onboard ensure student is eligible | • Process Remission to CARS and Payroll  
• Reconcile all student remissions by amount and type and report final adjustments to payroll | • Post Charges to Dept COAs  
• Process Journal Corrections (chart strings changes, amount adjustments) | • Review / analyze BAIRS Reports  
• Contact Payroll for chart string transfers or corrections  
• Contact Grad Div regarding eligibility and award amounts |
Funding Source - Fee Remission

- Paid by the salary source(s) of the appointment(s).
- Like all other benefits fee remission cannot be decoupled from the salary source(s) (except for NRST remission & GSR TC 3266)
Combination Appointments

- Fee remission charged *proportionately* to salary sources
- Fund Managers must *always* be aware of the *potential* of charges for portion of fee remission whenever hiring a GSI, GSR*, AI–GS, Reader or Tutor

*Except for GSR title code 3266*
How Does a Fee Remission Generate and Apply to a Student’s CARS Account?

Fee Remission Path
(during a Current Semester)

1. LBNL enters GSR appointment Data into GLOW
2. HCM Data Available to Grad Division the following business day
3. Grad Division processes fee remission and sends award to student’s CARS account
4. Graduate Division processes fee remissions based on data received through GLOW
5. Fee Remission in student’s CARS account the following business day (excluding holidays & weekends)
6. Hiring Unit enters appointment into HCM
How Does a Fee Remission Get charged to the Departmental COA?

**Fee Remission Path**
*(during a Current Semester)*

1. Grad Div sends transmittal of HCM data to Payroll mid-month
2. Payroll receives data and sets up a receivable for new or adjusted awards
3. Adjustments to remission amounts post Monthly via Financial Journals
4. The charges post via Payroll (PPS) journals Monthly
5. Payroll charges Dept COA of salary source in equal increments in the middle 3 months of the term

PPS journals and Financial Journals *(for adjustments)* available in BAIRS
How Does a Fee Remission Get charged to the Departmental COA?

1) Graduate Division Transmits a file to payroll mid-month in each term of all new and adjusted remission amounts by student and remission type (i.e. Full, Partial, GSHIP, NRST)
2) These amounts become a receivable in the Payroll system which are then charged off in 1/3\textsuperscript{rd} increments to the monthly salary source (Sep– Nov for Fall and Feb–Apr in Spring). December and May act as “clean-up” months-- charging off any remaining balance, if any. Posts to the GL as a PPS journal.
3) Any adjusted amounts from a previous transmittal will be corrected via BFS Financial Journal (n.b. if the HCM adjustment is processed after the mid-month send, the adjustment will post in the next month).
Examples: When a Remission will NOT Generate?

- Incorrect SID entered into HCM
- EID conflict
- Break in service
- Data Change/Corrections (in HCM)
- Student on Filing Fee
- Student Withdraws
- Sum of appointed positions < 170 hrs.
## Fee Remissions & CARS Priority List of Awards

1. Outside agency awards
2. LBNL remissions from GSRA appointments
3. Tuition and Fee remissions from UCB campus appointments
4. Department awards made through the Department Student Award System (DSAS)
5. Fellowship awards
6. Student Loans
7. Student payments
Graduate Division Transmittal to Payroll Schedule

<table>
<thead>
<tr>
<th>Graduate Division Remission Transmission File</th>
<th>Date Due*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spring Semester 2015</td>
<td></td>
</tr>
<tr>
<td>February</td>
<td>02/11/15</td>
</tr>
<tr>
<td>March</td>
<td>03/12/15</td>
</tr>
<tr>
<td>April</td>
<td>04/13/15</td>
</tr>
<tr>
<td>May (Adjustments)</td>
<td>05/12/15</td>
</tr>
</tbody>
</table>

*n.b. Dates proscribed by Payroll to meet pay schedule deadlines. If HCM adjustment occurs after this date, it will post to the GL the following month.
What’s New?
New Appointments
Policies for 2014

1) Late appointments for GSRs (no longer have to be hired by 1st day of the semester)
2) GSR Title Code 3266
3) NRST Matching Program
### The 170 Hour Rule

<table>
<thead>
<tr>
<th>17 week semester x 40 hr. work week x 25% = 170 Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Min Requirement</strong></td>
</tr>
<tr>
<td>25% equivalent time</td>
</tr>
<tr>
<td>For 17 week sem.</td>
</tr>
<tr>
<td>GSI, GSR, AI-GS, Reader/Tutor</td>
</tr>
<tr>
<td><strong>GLOW determines eligibility</strong></td>
</tr>
<tr>
<td>From dates of appointment(s) in HCM &amp; total % time</td>
</tr>
<tr>
<td><strong>Dates &amp; % time = 170 hrs. of work</strong></td>
</tr>
<tr>
<td>GLOW generates partial fee remission in 2 -5 business days after entered into HCM</td>
</tr>
</tbody>
</table>
# The 306 Hour Rule

17 week semester x 40 hr. work week x 45% = 306 Hours

<table>
<thead>
<tr>
<th>Min Requirement</th>
<th>GLOW determines eligibility</th>
<th>Dates &amp; % time = 306 hrs. of work</th>
</tr>
</thead>
<tbody>
<tr>
<td>45% equivalent time</td>
<td>From dates of appointment(s) in HCM &amp; total % time</td>
<td>GLOW generates full fee remission in 2 -5 business days after entered into HCM</td>
</tr>
<tr>
<td>For 17 week sem. GSR (<em>not</em> TC 3266)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Percentage Adjustment Charts

### Chart for 25% Time ASE & GSR appointments with Modified (Late) Start Dates

**Percentage Adjustment for a 25% time Appointment**

170 hours per semester = 25% time appointment

**Weeks of Semester (not of instruction)**
(refer to Academic Calendar for Semester begin/end dates)

<table>
<thead>
<tr>
<th>Week From Start of Semester</th>
<th>Hours per Week (equivalent to total 170 hours)</th>
<th>% Time Adjustment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week 1</td>
<td>10</td>
<td>25%</td>
</tr>
<tr>
<td>Week 2</td>
<td>10.6</td>
<td>26.6%</td>
</tr>
<tr>
<td>Week 3</td>
<td>11.3</td>
<td>28.3%</td>
</tr>
<tr>
<td>Week 4</td>
<td>12.1</td>
<td>30.4%</td>
</tr>
<tr>
<td>Week 5</td>
<td>13.1</td>
<td>32.7%</td>
</tr>
<tr>
<td>Week 6</td>
<td>14.2</td>
<td>35.4%</td>
</tr>
<tr>
<td>Week 7</td>
<td>15.5</td>
<td>38.6%</td>
</tr>
<tr>
<td>Week 8</td>
<td>17.0</td>
<td>42.5%</td>
</tr>
<tr>
<td>Week 9</td>
<td>18.9</td>
<td>47.2%</td>
</tr>
</tbody>
</table>

*This chart is based on the ASE charts provided in the 2002 memo on late ASE appointments from UCB Labor Relations. Refer to the Appointments 101 Tutorial for Staff found in the Appointments Handbook on the Graduate Division website.*

**Basic rules for using this chart:**

1. Refer to UCB Academic Calendar: Begin & Start Dates of the semester.
2. Have a monthly calendar handy so you can count weeks.
3. “Late” is referring to any day after the start date of the semester (not start of instruction).
4. The Effective Start date in HCM for the GSR or ASE Appointment should reflect the first day of the appointment week (aka it should be on the MONDAY of the week) except week 1 which should be the first day of the semester.
5. If the effective start date of the appointment in HCM is not on the first day of the semester or the first day of the appointment week (again, on Monday), then the percent time of the following week will need to be used in order to generate a fee remission. Example: If GSR starts GSR employment on the Wednesday of Week 3 of the semester. To generate partial fee remission the percent time of Week 4 will need to be used and not the percent time of Week 3. Call the Appointments Office if you need additional guidance at 642-7101 or email at gradpap@berkeley.edu.
6. International Students (J1 or F1 visa status) are excluded due to visa restrictions limiting them to a maximum of 20 hours per week (50% time). Please contact Berkeley International Office regarding visa restrictions at 642-2010.
7. Approval to work over 50% time for a late appointment is not required if all other eligibility criteria are met.

### Chart for 50% Time ASE & GSR appointments with Modified (Late) Start Dates

**Percentage Adjustment for a 50% time Appointment**

340 hours per semester = 50% time appointment

**Weeks of Semester (not of instruction)**
(refer to Academic Calendar for Semester begin/end dates)

<table>
<thead>
<tr>
<th>Week From Start of Semester</th>
<th>Hours per Week (equivalent to total 170 hours)</th>
<th>% Time Adjustment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week 1</td>
<td>20</td>
<td>50%</td>
</tr>
<tr>
<td>Week 2</td>
<td>21.3</td>
<td>53.2%</td>
</tr>
<tr>
<td>Week 3</td>
<td>22.7</td>
<td>56.7%</td>
</tr>
<tr>
<td>Week 4</td>
<td>24.3</td>
<td>60.7%</td>
</tr>
<tr>
<td>Week 5</td>
<td>26.2</td>
<td>65.4%</td>
</tr>
<tr>
<td>Week 6</td>
<td>28.3</td>
<td>70.9%</td>
</tr>
<tr>
<td>Week 7</td>
<td>30.9</td>
<td>77.3%</td>
</tr>
<tr>
<td>Week 8</td>
<td>33</td>
<td>85%</td>
</tr>
<tr>
<td>Week 9</td>
<td>37.8</td>
<td>94.5%</td>
</tr>
</tbody>
</table>

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6. International Students (J1 or F1 visa status) are excluded due to visa restrictions limiting them to a maximum of 20 hours per week (50% time). Please contact Berkeley International Office regarding visa restrictions at 642-2010.
7. Approval to work over 50% time for a late appointment is not required if all other eligibility criteria are met.
FALL 2014 – GSR Title Code 3266 allows decoupling of ‘benefits’ (fee remission) from salary source

This change is to accommodate grants where expenditure of tuition and fees on funds is not permitted

No longer combines with other GSI, GSR, Reader, Tutor or AI-GS appointments to create a remission, nor share the cost of fee remissions

GSR Title Code 3266 should only be used at 25% time or greater and an alternate fund source(s) must cover the equivalent fee remission for which the appointment is otherwise eligible. Graduate Division will post audit these appointments for compliance
NRST Matching Program

Who is Eligible?
• Fall 2014 – New Non-Resident Doctoral Students

<table>
<thead>
<tr>
<th>Entry Year</th>
<th>New 1st Year</th>
<th>2nd Year Pre-advanced</th>
<th>3rd Year Pre-Advanced</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>2016</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>2017</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>
Which Funds Apply to NRST Matching Program?

**Qualifying Funds**
- Contract & Grant Research Funds used to pay Title Code 3284 GSR appointments at \( \geq 45\% \) time
- Departmentally-Restricted (DR) funds administered through the Graduate Division (via GLOW).

**Ineligible Funds**
- Departmentally-restricted funds already matched through Graduate Fellowship Matching Program (GFMP)
- Awards made through DSAS
- Graduate Division Block Allocation Funds
- LBNL funds
For Complete Information on NRST Matching Program...

Refer to the Fellowships Handbook found on the Graduate Division Web Site, http://graddashboard.berkeley.edu/
choose the Handbook and CalNet Authenticate or Contact the Graduate Fellowships Office
http://grad.berkeley.edu/about-us/contact/
Checking the GL: Getting to the Dashboard

BAIRS Customer Report
GL Customer Report
**GL Customer Report**

GL Customer Report by Fund - 9 col All Current Funds ModC&G

**Business Unit:** UC Berkeley  
**Fiscal Year:** 2012 - 13  
**Month:** From February to June

**C&G Funds**  
**FUND 32863 - CNS-0932209-Katz-FNL**

**Chartfield 2 EHRXX - Katz**

**DIRECT COSTS**

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Department Desc.</th>
<th>Doc Id</th>
<th>Reference</th>
<th>Authorized Budget</th>
<th>Tempbudg</th>
<th>Actuals</th>
</tr>
</thead>
<tbody>
<tr>
<td>03/25/13</td>
<td>CHEN KAIFEI</td>
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<td>12487333</td>
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<td>0.00</td>
<td>-6,436.74</td>
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<tr>
<td>06/30/13</td>
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<tr>
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<td>81198660</td>
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<td>0.00</td>
<td>2,629.91</td>
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<tr>
<td>04/03/13</td>
<td>DAWSON HAGGERTY STEPHEN</td>
<td></td>
<td>81198660</td>
<td>0.00</td>
<td>0.00</td>
<td>2,629.91</td>
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<tr>
<td>05/06/13</td>
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<tr>
<td>05/06/13</td>
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<td></td>
</tr>
<tr>
<td>06/02/13</td>
<td>HE MIKE MAO</td>
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<td>2,629.91</td>
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<tr>
<td>04/03/13</td>
<td>HE MIKE MAO</td>
<td></td>
<td>81227822</td>
<td>0.00</td>
<td>0.00</td>
<td>2,629.91</td>
<td></td>
</tr>
</tbody>
</table>
Recap-- What Did We Learn Today?

• 1) How a remission is generated (eligibility, roles and responsibilities).
• 2) The timing of charges to chart string(s) via PPS journals and Financial Journals (adjustments).
• 3) Updates– 3266 (no remission), accelerated appointments, NRST match.
• 4) Which BAIRS report to review.
Contact Information

• Graduate Appointments – gradappt@berkeley.edu, 642–7101, 318 Sproul Hall, MC 5900

• Graduate Division Financial Analysis – mfgrad@berkeley.edu, 642–7492, 302 Sproul Hall, MC 5900

• Graduate Division: http://grad.berkeley.edu/about-us/contact/

• Central Payroll – payhelp@berkeley.edu, 642–1336, 2195 Hearst Ave. #120
Resources

- Graduate Appointments Resource Website (CAS):
  http://graddashboard.berkeley.edu/appointments/

- Graduate Fee Remission Eligibility Chart:
  http://graddashboard.berkeley.edu/appointments/fee-remission-eligibility/

- Graduate Tuition and Fee Remission Eligibility:
  http://graddashboard.berkeley.edu/appointments/appointments-eligibility/
Questions?