

Creating an Assistantship Agreement

Assistantship agreements are created in the Graduate Financials System in the GradInfo intranet. They begin with the entry of an assistantship offer or an assistantship award. Below is an overview of Awards and Agreements areas in the Graduate Financials System.

Awards

The Awards tab serves as the entry point for entering your assistantship agreement details. If you have access to the Graduate Financials System, you can view data entered into Awards. However, only those who have access to a specific program will be able to enter assistantships and modify assistantship details.

Only enter assistantships in Awards if you do not wish to send an assistantship offer e-mail to your students. For more information about sending offer e-mails, see Assistantship Offers (https://graduate.ucf.edu/graduate-guide/).

The Awards page has two important features: entering Awards data and creating an agreement.

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The **New Award** button allows you to add an assistantship award for your student. These details will be used to create your agreement. After selecting the assistantship terms and hours per week, you will be able to:

- Select your assistantship type, job code and funding program.
- Select nonstandard hours per week, if applicable for this assistantship.
- Enter the total assistantship stipend for each term and, if applicable, additional tuition or fees amounts.
- Add comments (optional).
- Select Tuition Payment and GTA Waiver levels. The GTA Waiver Department number will default to your funding program. However, it can be changed to 9999 for a supplemental assistantship or 2044 for a student who has a university fellowship.
- Enter the Faculty Supervisor EMPLID, if available at this time.
- Enter Assistantship Assignment details, if available at this time.
- Add a stipend funding department (optional).
- Add a tuition funding department, if available at this time.

Data entered into Assistantship Offers and Fellowship Offers copy into the Awards so you will not have to re-enter this information.

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In addition to entering your assistantship details and creating an agreement, you will be able to view Student Information (from PeopleSoft), Assistantship Awards, and Fellowship Awards data. If an assistantship or fellowship offer was sent to the student, you will be able to view the assistantship offer and fellowship offer details.

To view the fellowship or assistantship entry, click Link to Fellowship Offer or Link to Assistantship Offer.

2012 Graduate Deans Fellowship Package Information												
Status	Term	Program	Stipend	Health Insurance	Waiver	View						
Accepted	Fall 2012 - Link to Fellowship Offer	Accounting MSA	\$0.00	No	\$0.00	View						
Accepted Accepted	Fall 2012 - Link to Fellowship Offer Spring 2013 - Link to Fellowship Offer	Accounting MSA Accounting MSA	\$0.00 \$0.00	No Yes	\$0.00 \$0.00	View View						

To view the Award details, click **Details** under View. To edit details that were previously entered, click **Edit**, make your changes and **Submit** your changes.

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It's important to note that GTA Waiver and Tuition Payment changes entered in Awards update automatically in your **Budget**. Therefore, ensure that your GTA Waiver and Tuition Payment information is correct and up-to-date.

Once you have entered and reviewed your Awards data, you may create an agreement by selecting the assistantship terms and clicking the Create Agreement button.

Agreements

After you have created and saved an assistantship agreement, the Agreements page is where you may view and make changes to it and manage the agreement approval.

ome Str	ident Profile	Awards	Agreement	Assistantship Offers	Fellowship Offers	Reports	Downloads	Budget		
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sistant	ship Aaree	ements								
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arch Agreeme	ents									
						* Total Numb	er of Agreements	3		
EMPLID:						rounnender of Agreements 5				
FirstName:			Hiring	Select One		Graduate Graduate	Teaching Assistant: Assistant: 2	13		
LastName:			Department:							
Financial	2010-2011		Program:	Select One						
1001	GA: (9186)		Enrolled							
	GRA Asst: (91)	82)	Enrolled			 ePAF IDs As 	isigned 1			
Job Code:	GRA Associ (S	181)	Program:			Number of	GS Approved 0			
	GTA Assoc (9	183)	Subplan:							
	GTA Grader: (9187)	Agreement							
Status:			ID:							
ePAF No:			Date:							
Include Deleted:			Start date (from):							
			End date							

In the Search Agreements box, you can enter search criteria to view an assistantship agreement for an individual student or for a group of students. As search criteria are entered, the total number of agreements, ePAF IDs Assigned, and number of GS Approved agreements for that criteria appear on the right. This information helps you keep track of your assistantship processing.

Search Results for the criteria selected appear as a table on the bottom of the page and may be exported to an Excel spreadsheet.

Search Agreements Show / Hide										v / Hide									
Se	arch Res	sults:	4																
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Excel spreadsheet																			
	Stud	lent Info [·	-]								Assis	tantship lı	nfo [-]						
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[-]	[-]	[-]	[-]	[-]	[-]	[-]	[-]	[-]	[-]	[-]	[-]	[-]	[-]	[-]	[-]	[-]		[-]	
532 (2) History	04/02/2012 04:26:06PM		Graduate	Student	GTA - 9184	20	08/15/2010	05/05/2011	Accounting MSA Prof track	2010-2011	View Stop Workflow	Workflow in Progress	Business Administration	Accounting MSA		Hire: 123456	Fa	Sp	
530 (3) History	03/28/2012 11:00:46AM		Graduate	Student	GTA - 9184	20	08/15/2010	05/05/2011	Accounting MSA Prof track	2010-2011	View Edit Start Workflow GS Hold	Ready for EPAF (1)	Business Administration	Accounting MSA		Hire: 123456	Fa	Sp	

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Information provided in the Search Results will be helpful to you as you review your agreement data:

- Each Assistantship Agreement is assigned an **ID** for tracking purposes in the system. It helps to distinguish one agreement from another.
- The Timestamp indicates the date and time a change was saved on the agreement.
- The Job Code displays the Assistantship Type abbreviation (e.g., GTA, GRA, or GA) and job code (e.g., 9181-9187).
- The Hours per Week displays the work hours (i.e., Standard Hours that will be entered on ePAF) for the assistantship agreement.
- The Funding Program is the program or department that is providing the assistantship.
- When tuition payments and optional fees have posted to Student Accounts, the term is highlighted in Payments to SA.

Actions

After creating an agreement, you may initiate an Action. Actions include:

This Action:	Does This:
View	View the assistantship agreement that has been saved.
Edit	Edit agreement details. You may also view Approver and Student comments, History, and other agreements the student may have.
Delete	Delete the agreement.
Start Workflow	Begin the agreement approval workflow.
Stop Workflow	Stop the agreement approval workflow.

Status

Once an action has been initiated, the agreement Status updates. The Status will help you determine where your agreement is in the Agreement Approval process. Agreement statuses include:

This Status:	Means this:
Not Evaluated	Agreement details were created and saved, but the agreement has not been sent through the Agreement Approval workflow.
Workflow in	Agreement is pending approval from DAL and Agreement approvers.
Progress	Note: You cannot edit the agreement until the approval workflow completes or the workflow has been stopped.
Ready for EPAF	Agreement has been approved by all agreement approvers and it is now ready for the ePAF.
Cancelled	Agreement details were cancelled. A cancelled agreement cannot be un-cancelled.
GS Approved	Graduate Studies has approved the ePAF and agreement.
GS Hold	Graduate Studies has placed the agreement on hold.
Resubmitted After Approval	Changes were submitted to the agreement after it was approved by Graduate Studies.
Denied	The agreement was not approved by one of the agreement approvers or by Graduate Studies. You will need to edit the agreement and then send it back to your approvers by clicking Start Workflow in the Actions column on the Agreements homepage.

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Here is how the Actions and Status columns change while your agreement is in the agreement workflow:



- 1. Agreement details have been entered and saved.
- 2. The Agreement Workflow has begun and it is pending approval from your agreement approvers.
- 3. Your agreement has been approved by your approvers and it is now ready for ePAF.
- 4. Graduate Studies has reviewed and approved your ePAF and agreement.

View

Once your agreement is saved, you may view a draft or edit the information by clicking View in the Search Results box.

This is what a draft of the agreement looks like:



Edit

You may edit the agreement before starting the agreement workflow. You may also edit the agreement after the agreement workflow has finished and after the agreement has been approved by Graduate Studies.

Note: You cannot edit the agreement while the approval workflow is in progress (Status = Workflow in Progress). You must stop the workflow.

In addition to editing the agreement, you may:

• Enter comments that are to the student and comments that are for your reference only and not visible to the student.

Comments	Show / Hide
Agreement Custom Message	Comments
This message will be visible to the student.	Your comments on the changes you made (NOT visible by the student).
*	*
-	τ

• View the history of comments that you have entered in the User Comments section.

User Comments			Show / Hide
Comments History			
Comments	Date	Username	
			Cancel Save changes

• View the agreement Versions/Workflow history and Workflow Status.

list	ory									
/ers	ions / We	orkflow								Show /
han	ge Logs				Workflow Statu	5				
	Ver. #	Date	Username	Status	Туре	Name	Title	Decision	Decision Date	Comm
	5	04/03/2012	Lavonda Walker	GS Approved	Agreement	Jennifer Parham	Assoc. Director	Approved	03/28/2012 11:00:05AM	
	4	04/03/2012	Lavonda Walker	GS Approved		Graduate			03/28/2012	
	3	03/28/2012	Student	Ready for EPAF	Student	Student	Student	Approved	11:00:46AM	
	2	03/28/2012	Lavonda Walker	Workflow in Progress	Show/Hide A	I Workflow Hi	story			
	1	03/28/2012	Lavonda Walker	Not Evaluated						
ом	PARE									

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• Compare and review agreement versions. To do so, select the checkboxes in the Versions/Workflow section and click Compare.

Versions / Wo	rkflow						
Change Logs	Carlos	Ibertama	Cata				
1 5	04/03/2012	Lavonda Walker	GS Approved				
P1 4	04/03/2012	Lavonda Walker	GS Approved				
	00000000	Chudaed	Baads for EBIE				
	00/20/2012	Subjern	Heady for EPAP				
	03/28/2012	Lavonda waiker	wondow in Progress				
2 1	03/28/2012	Lavonda Walker	Not Evaluated	· · · · · · · · · · · · · · · · · · ·			
		Versi	me : GFA ions 5 and 1	There are d	lifferences in the	versions	
				A	pprovers are different.		
		Studer	nt Info				
				Version 5		Version 1	
		EMPLIC	D	1748254		1748254	
		Student	t Name	Graduate Student		Graduate Student	
		Useman	me	Iwalker		Iwalker	
		Status		GS Approved		Not Evaluated	
		Categor	a de la companya de la company	Graduate Teaching Assistant		Graduate Teaching	Assistant
		Agreen	sent Date	04/03/2012 03:27:32 PM		03/28/2012 10:55:3	39 AM
		Start Da	afe	08/15/2010		08/15/2010	
		End Da	te .	05/10/2011		05/05/2011	
		College		Business Administration		Business Administ	tration
		Hiring P	Program	Accounting MSA Prof track		Accounting MSA Pr	of track
		Standar	rd Hours	20.00 Hrs		20.00 Hrs	
		Total S	löpend	\$10,000.00		\$10,000.00	
		Appro	wers				
		Approve	er	Jennifer Parham	Approver		Jennifer Parham
		Decision	n date	03/28/2012	Decision date		
		Comme	ent		Vormeit		

• View a history of agreements created for your student.

Agre	Agreements for Student Show / Hide												
ID	Financial Year	Hiring Department	Status	Assistantship Category	Hours	Start Date	End Date	ePAF Form	ePAF Number	Last User			
526	2010-2011	Electrical Engineering MSEE	Ready for EPAF	Graduate Assistant (9186)	20.0	08/20/2010	12/10/2010			Student			
527	2010-2011	Electrical Engineering MSEE	Not Evaluated	Graduate Assistant (9186)	20.0	01/10/2011	05/05/2011			Kari Stiles			
530	2010-2011	Accounting MSA Prof track	GS Approved	Graduate Teaching Assistant (9184)	20.0	08/15/2010	05/10/2011	Hire	123456	Lavonda Walker			
532	2010-2011	Accounting MSA Prof track	Not Evaluated	Graduate Teaching Assistant (9184)	20.0	08/15/2010	05/05/2011	Hire	123456	Lavonda Walker			

Agreement Approval

Assistantship agreements are approved in the Assistantship Agreements Approval website. Both DAL and agreement approvers, as well as the student, receive an e-mail notification when the agreement is ready for their review and decision. DAL and agreement approvers log into the Agreement Approval website using their official UCF Business E-mail address and password. Student login using his/her UCF Knights E-mail address and password. First-time login requires the UCF E-mail address and the month and date of birth; after logging in, they create a password, which does not expire.



		I am a(n): • New U	ser 🔿 Existing User
This is a UCF College of	Graduate Studies website used by hiring department and prog	gram UCF Email:	
sign them.		Birthdate: Ex: May 12 = 0512	
		Sign Up	

When logged into the Agreements Approval website, DAL and Agreement Approvers can:

- View all assistantship agreements pending approval.
- View Approval History.
- Enter and view DAL and Agreement Approver comments. **Note:** The agreement originator may view comments by viewing the agreement in the Graduate Financials System > Agreements > Search for the student > click Edit > scroll down to the Approval Workflow section.
- View the PDF version of the agreement.
- Approve or Decline the agreement.

If the Agreement Approver and DAL is the same person, they will only approve the agreement once.

The student cannot view approval history or DAL/Agreement Approver comments. The student can view all assistantship agreements awaiting a decision and accompanying PDF agreements, enter a comment for review by the agreement originator, and Accept or Decline the agreement.

Sample Agreement

This is what your agreement will look like as you enter the details:

Student Informa	tion (P	eople Soft)									e saring	344	Show /
mpliD	NID	N	eme			Gender	Residency		E-mail			Intern	ational
		C	radu	ate Stu	dent	Female	FL-Reside	ent t	esting@ho	tmail.com		No	
rogram					Subplan	Ao	ademic Level			Adm	it Term		
ccounting MSA						MA	STR			Fall	2010		
nrollment Status					Enrolled Hours	Thes	is Hours	Disserta	tion Hours		U	GRD Hours	
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										-			
ssistantship De	etails												Show /
ssistantship Categ	ory					1	Hours Per Week			Start Date	6	End Da	te
Braduate Teachin	g Assis	tant: (9184)					20.00			8/15/2010)	5/5/20	11
lining Department	Program	•					College			ePAF Typ	e	ePAF N	lumber
Accounting MSA I	Prof tra	ck 💌	Details	E:			Business Admini	stration		Hire		12345	6
TA Assigment					Faculty Supe	rvisor(s)			Agreemen	t Approver(s)			
Course Prefix	Num	ber Sec	tion		EmpliD	Name		1	Empl	D Name		Title	
				ADD				ADD					AD
¢ GFA	123	4 00	01	0	:	Debra	Winter	0	:	Jennife	r	Assoc.	0
										Parhar	n	Director	-
GFA	123- been lock is	4 00	02 ause th	Cone Lockor row.	utDate for that 1	Term has passe	ed. You must i	unlock the re	ow or cha	nge the ter	m to be	able to n	nodify. Show/
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This is what your agreement will look like after receiving approval:

nip Ag	reement	1 - 530						
G	UCF	College of Graduate	STUDIES	; Gr	aduate	Assistant	ship Agree	mer
Student	Graduate	Student						
On beh and in a state of	alf of the Pres accordance wi Florida, you a	sident and Boa th the regulati are offered a g	ard of Trus ons apper graduate a	stees of the Univertaining thereto a assistant appointr	ersity of Cen nd further si nent.	tral Florida and ubject to the cor	the Board of Gov stitution and laws	ernors s of the
Assist	antship Det	tails						
Start Da	te: 08/15/2010	End	1 Date: 05/1	0/2011	Hours per we	ek: 20.0		
Assista	antship:			9184 - Graduate T	eaching Assi	stant		
GTA A	ssignment:			GFA 1234 0001 GFA 1234 0002				
Facult	y Supervisor.			Debra Winter				
Hiring	Department o	r Program:		Accounting MSA Pr	of track			
Colleg	e or Office:			Business Adminis	tration			
Your ap employs the Univ Fundin	pointment un ment is requir versity of Cent ng - Total Sti	der this agree ed. This appoi tral Florida. ipend: \$10,00	ment will c intment ma	ease on the date ay be renewed or	e indicated. I nly by a muti	No further notice ual agreement b	e of cessation of etween the stude	ent and
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Step-by-step Instructions

Let's walk through completing the Assistantship Agreement, step by step.

Enter Awards Details

- 1. Log into the Graduate Financials System and click on the Awards tab.
- 2. Enter your student's EMPLID and click Submit.
- 3. Review the Student Information (from PeopleSoft) and Program Information section to be sure this is the correct student.
- 4. In the Program Information section, click the New Award button.
- 5. Under Select Offer Options, select the radio buttons associated with the assistantship and click Continue.

Page 11 of 17 Creating an Assistantship Agreement (continued)

Example: If you want to enter an Award for a 20 hours per week assistantship for fall and spring, select "Single 20 Hour Assistantship" in the Fall and Spring rows and select "None" in the Summer row.

Select Offer Optic	ons:													
Asst Terms:	Offer Options:													
Fall 2010	None	Single 20 Hour Assistantship	Single 10 Hour Assistantship	C Two 10 Hour Assistantships										
Spring 2011	O None	Single 20 Hour Assistantship	Single 10 Hour Assistantship	Two 10 Hour Assistantships										
Summer 2011	None	Single 20 Hour Assistantship	Single 10 Hour Assistantship	C Two 10 Hour Assistantships										
Â														
				Continue										

6. Under **New Award Package**, enter the details of the Award to be included in your agreement. Each assistantship term that you selected has its own tab.

New Award Package												
all 2010 - 20 Hrs Spring 2011 - 20 Hrs												
andred Henry Van Standard Henry Arsistankhin Tuna lat Gada Sundina Rosanan												
Standard Hours	Non Standard Hours	Assistantship Type	Job Code	Funding Program								
20 Hours	0.00	Graduate Teaching Assistant 💌	9184	Accounting MSA Prof track	•							
Total Assistantship Stipend*			Standard Resident Tuition	Additional Tuition or Fees Amount	Total Tuition							
	\$ 3,300.00		\$2,309.04	\$ 0.00	\$2,309.04							
Comments	Tuition Payment Level	GTA Waiver	GTA Waiver Department									
×	- •	1.0 •	0	 5555 (Linked to Funding Program) 9999 (Supplemental Assistantship) 2044 (The student has a Fellowship Award) 								
Faculty Supervisor	Assistantship Assignment	Stipend Funding Department	Tuition Funding Department									
Debra Winter		• 11111111 - Delete	• 22222222 - Delete	Add								
		Submit										

- Standard Hours selected on the Select Offers Options page appear here.
- Non-Standard Hours should be selected from the drop-down list if the student is not working 10 or 20 hours per week. This is the total hours per week for the appointment, and the Standard Hours that will be on the ePAF. It will replace the standard hours selected from Select Offers Options.
- Assistantship Type Select Graduate Assistant, Graduate Research Assistant, or Graduate Teaching Assistant.
- Job Code Optional field. Enter the job code for the Assistantship Type you selected. For example, if you selected Graduate Teaching Assistant from the Assistantship Type drop-down list, enter 9187 if the student will be a Graduate Teaching Grader, 9184 if the student will be a Graduate Teaching Assistant, or 9183 if the student will be a Graduate Teaching Associate. A complete list of assistantship job codes can be found online in the Graduate Guide: https://graduate.ucf.edu/graduate-guide/
- Funding Program Select the Funding Program from the drop-down list.
- Total Assistantship Stipend Enter the total assistantship stipend for the term in the box.
- **Tuition** The system automatically fills in the Standard Resident Tuition amount for 9 credit hours in the Fall and Spring and 6 credit hours in Summer. You may add an additional amount by entering a dollar amount in the **Additional Tuition or Fees Amount** box (Optional field).
- **Comment** –Optional field. Include additional comments that may be useful to you when processing the agreement or may help your program.

NOTE: It is important to understand the difference between a tuition payment and a tuition waiver.

A tuition payment is authorization to charge your department or project fund for the cost of the student's resident tuition or part of it, depending on the details of the student's assistantship and if there are other fund sources sharing the responsibility for paying the cost. This authorization must be done by someone who is on the Department Authorization List (DAL) to authorize charges against the department or project fund.

Page 12 of 17 Creating an Assistantship Agreement (continued)

GTA tuition waivers are allocated from the College of Graduate Studies to graduate programs for use in covering the tuition remission for GTAs. Each graduate program with a GTA tuition waiver allocation has a Waiver Department Number (4-digit number) that identifies its GTA tuition waiver budget. In order to assign a GTA tuition waiver to a student, you will need to fill in the Waiver Department Number on the student's Assistantship Agreement. GTA tuition waivers may be used as Full (1, for 20 hours per week assistantship) or Half (.5, for 10 hours per week assistantship).

Waiver department number 2044 should be used for university fellowship students.

Waiver department number 9999 should be used for student's receiving a supplemental assignment.

- Tuition Payment Level Select the Tuition Payment (.5 for a half tuition payment and 1.0 for a full tuition payment) level for the hours per week selected. Note: Graduate Assistants, Graduate Research Assistants, and Graduate Teaching Assistants beyond your GTA waiver allocation must have a tuition payment.
- GTA Waiver Select the GTA Waiver level (.5 for a half tuition payment and 1.0 for a full tuition payment) level for the hours per week selected. Note: Graduate Teaching Associated, Assistants, and Graders and university fellowship students may receive a GTA Waiver.
- **GTA Waiver Department** The GTA Waiver Department is linked to the Funding Program that is selected. If the student will be on a Supplemental Assistantship, select the **9999 (Supplemental Assistantship)** button. If the student will receive a university fellowship that includes support paid for by Graduate Studies, select the **2044 (The student has a Fellowship Award)** button.
- Faculty Supervisor Optional field. Enter the EMPLID of the faculty who will supervise the student. For GTAs, this is the same faculty member who will complete and submit a Graduate Teaching Performance Assessment.
- Assistantship Assignment Optional field. Enter comments about the assistantship assignment such as course number and prefix.
- Stipend Funding Department *Optional field.* Enter the eight (8) digit account number that will fund the assistantship stipend and click Add. Note: This account does not copy into the Agreement is only available to view in Awards.
- Tuition Funding Department Enter the eight (8) digit account number that will pay the tuition remission for the assistantship. Note: Up to four (4) account numbers will copy onto the Agreement.
- 7. Repeat step 6 for all award terms. Select the tab for the award term you want to complete.
- 8. When entry is complete, select **Submit**.

Create an Agreement

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9. Review the award details in the Assistantship Awards section. You may view individual details for each term by clicking **Details** under **View**. You may edit the details of the award by clicking **Edit**.

10. Once you have reviewed all of the Award details, click the assistantship terms to be included in the agreement and click **Create Agreement**.

Asst Status	Asst Term	Supporting Program	Asst Type	Job Code	Standard Hours	Non Standard Hours	Total Stipend	Total Tuition	View	Edit	Renew	Create Agreement
Accepted	Fall 2010	Accounting MSA Prof track	GTA	9184	20	-	\$5,000.00	\$2,309.04	Comments Details	Edit	Renew	
Accepted	Spring 2011	Accounting MSA Prof track	GTA	9184	20	-	\$5,000.00	\$2,309.04	Comments Details	Edit	Renew	
												Create Agreement

Page 13 of 17 Creating an Assistantship Agreement (continued)

11. Review the Student Information (from PeopleSoft) to verify the students enrollment and GTA Eligibility, if applicable.

Home: Agre	eements : Edit										
Assista	antship Agre	ement - Ne	W			Templat Apply	es: Ci	ear Exitw	vithout savi	ng	Save changes
Student Info	ormation (PeopleSoft)										Show / Hide
EmpIID	NID	Name		Gend	ler	Residency		E-mail			International
		Graduate Stu	udent	Fem	ale	FL-Resident		testing@hotmail	.com		No
Program			Subplan		Acaden	nic Level			Admit Term		
Accounting	MSA				MASTR	2			Fall 2010		
Enrollment St	tatus		Enrolled Hours		Thesis Ho	ours	Dissert	ation Hours		UGRE) Hours
Not Enrolled	d Full Time		3.0		0.0		0.0			0.0	
Highest GTA	Eligibility	Highest SPEAK Test	Score	Pending	GTA Perfo	ormance Assessments			Fellowship Na	me for	2011
									-		

12. In the Assistantship Details section, enter the agreement start/end dates.

13. In the **GTA Assignment** box, enter the **Course Prefix**, **Number**, and **Section** and click **Add**. Repeat this step for multiple GTA course sections. **Note:** Course Prefix and Number must be entered for GTAs.

14. Faculty Supervisor data copies from Awards. To add a faculty supervisor, enter the EMPLID and click Add.

15. Enter the **Agreement Approver** EMPLID, Title (optional) and click **Add**. **Note:** Agreement Approvers should be entered in the order you want them to approve the agreement. If you want the Faculty Supervisor to approve the agreement, enter the supervisor's EMPLID as an Agreement Approver.

As	sistantship De	tails												Show / Hid
Assi	istantship Catego	ory					Hours Per Week				Start Date		End Date	
Gr	aduate Teaching	Assistant: (91	84) 💌				20.00 👻				8/15/2010		5/5/2011	
Hiri	ng Department/F	rogram					College				ePAF Type		ePAF Numb	er
Ac	counting MSA P	rof track	 Details: 				Business Admini	istration	•		Hire	•	123456	
GT/	A Assigment				Faculty Supervisor(s)				Ag	reement A	pprover(s)			
	Course Prefix	Number	Section		EmpIID	Name				EmpIID	Name		Title	
				ADD				ADD						ADD
\$	GFA	1234	0001	0	\$	Debra	a Winter	8	\$		Jennifer Parham		Assoc. Director	0
t	GFA	1234	0002	0										

16. In the **Stipend and Tuition** section, ensure that the **Total Stipend** (copied from Awards) is correct. If you missed entering a Waiver Dept. No. or Dept./Proj. No. in Awards, you may add or update this information on the agreement. **Note: If tuition changes are made on the agreement, remember to edit your entry in Awards to ensure that your Budget information is correct.**

Clic	= Row has been king the unlock id end and Tuition	locked becaus	the Lockou	utDate for that Te	erm has passe	d. You must u	inlock the row or	change the ter	m to be able	to modify.	ow / Hide
Tota	l Stipend			\$ 10000.00							
	Term	Waiver Dept. No.	Dept/Proj No.	Use for Stipend	Optional Fees	Credit Hours	Percent Distribution	Resident Tuition	DAL Emplid	Title	
\$	Fall 2010 💌	5555	0	No 💌	\$ 0.00	9.0 💌 Hrs	100 🗸 %	\$2,309.04			0
\$	Spring 2011 💌	5555	0	No 💌	\$ 0.00	9.0 💌 Hrs	100 💌 %	\$2,309.04			۲
ADI											
l au indi	thorize the Office cated on this ass	e of Student Ac sistantship agre	counts to pro	ocess a Departm tified that funds a	ent/Project pag are available a	yment from th nd may be us	e Department/Pr ed to pay tuition	oject specified and fees.	above for th	e student	

Page 14 of 17 Creating an Assistantship Agreement (continued)

Remember, there are three ways to pay tuition remission:

- By tuition payment.
- By tuition waiver (reserved for GTAs and university fellowships only).
- By a **combination of tuition waiver and tuition payment** (for GTAs only, when the hiring department does not have enough GTA tuition waivers to pay solely by GTA tuition waiver).

Tuition data copies from Awards, however, you may add or edit information in the Agreement. If you make tuition remission changes on the agreement, remember to update your entries in the Awards page. This will ensure that your GTA Waiver and Tuition Payment data in your Budget is correct.

Tuition Payment

Use the **Add** button to add a tuition row for each term of the assistantship. You can also add multiple rows for the same term, if you need to split the stipend and/or resident tuition remission charges across multiple Department/Project numbers.

For each term of the assistantship:

(1) Enter the Department/Project number that will pay the student's resident tuition remission.

(2) Select "Yes" from the Use for Stipend drop down list if the assistantship stipend will be charged to this Department/Project number. When a Dept/Proj No. is C&G funds, the percentage of a student's total earned salary assigned to the project should match the percentage of the student's total tuition charges assigned to the project.

NOTE: If you have questions about C&G projects and tuition payments, see the interview with Douglas Backman from the UCF Office of Compliance in the October 2008 Graduate News: http://www.gradnews.graduate.ucf.edu/article.aspx?id=986&nid=974

(3) Enter the amount to pay toward Optional Fees (local fees), if this applies.

NOTE: You will need to calculate the Optional Fees amounts yourself. Refer to the current Tuition and Fees Schedule. If the student is a Non-Florida resident and will receive the Differential Out-of-State rate (i.e., will have full assistantship and full resident tuition remission), figure Optional Fees only for resident charges.

(4) Select the total **Credit Hours** the student will be enrolled in the term. When you tab out of the Credit Hours field, note that the Resident Tuition Payment calculates. Resident Tuition Payment is based on the Graduate Credit Hour Fee, the Standard Hours Per Week (e.g., 20 hours per week, 10 hours per week), and the Percent Distribution field. It is important to enter the correct total credit hours.

(5) Percent Distribution defaults to 100%. Change this percentage only if you wish to split the tuition payment across two or more Department/Project numbers.

(6) Enter the DAL EMPLID and Title (optional).

GTA Tuition Waiver

Use the Add Tuition Line button to add a tuition row for each term of the assistantship.

For each term of the assistantship:

(1) Enter the Waiver Department Number that will pay the student's resident tuition remission. The Waiver Department Number is a four-digit number used in PeopleSoft to identify GTA tuition waiver budgets. The College of Graduate Studies uses this number to enter a student's GTA tuition waiver in a PeopleSoft GTA tuition waiver budget.

If you do not know your GTA Waiver Department Number, contact Pam Scaltsas at 823-1504 or gradassistantship@ucf.edu.

NOTE: For university fellowship students whose awards include a College of Graduate Studies tuition waiver, enter **2044** for the Waiver Department Number on any Assistantship Agreements.

(2) Select the total Credit Hours the student will be enrolled in the term.

NOTE: GTA tuition waivers do not require DAL authorization, so the DAL area remains blank.

Combination of GTA Tuition Waiver and Tuition Payment

A GTA tuition waiver may only be awarded as Full (1) or Half (.5). A tuition payment may be split across multiple Department/Project numbers, as needed. In these instructions, it is assumed that the student has a full (20 hours per week) assistantship and will receive a Half GTA tuition waiver and a Half tuition payment paid from one fund source.

For each term of the assistantship, use the Add button to add a tuition row for a half GTA tuition waiver and a tuition row for a half tuition payment. Then, follow these instructions for each term of the assistantship:

(1) On the first tuition row, enter the Waiver Department Number that will pay the student's GTA tuition waiver and the total Credit Hours the student will be enrolled in the term. Then, change the Percent Distribution from 100 to 50.

(2) On the second tuition row, enter the Department/Project number that will pay the student's tuition payment, check the stipend box, and enter the total Credit Hours the student will be enrolled in the term. Then, change the Percent Distribution from 100 to 50.

(3) Enter the DAL Signature details (name, initials, EMPLID, phone no., date). Then, enter the DAL initials at the end of the tuition payment row above.

17. Include **Comments** that may be useful when processing the agreement or may help your program. Comments entered into **Agreement Custom Message** will be made visible to the student.

Comments			Show / Hide
Agreement Custom Message		Comments	
This message will be visible to the student.		Your comments on the changes you made (NOT visible by the student).	
Meet with your faculty supervisor to go over the details of your GTA assignment prior to the start of classes.	*	Check GTA Training eligibility and enrollment.	*

18. Review all data entered into the Agreement and click Save Changes.

Start Agreement Workflow

19. On the Agreements homepage, enter the student's EMPLID into the **Search Agreements** box and click **Search**.

20. Find your agreement in the Search Results. In the Actions column, click Start Workflow.

\$ ID	‡ Timestamp	‡ Emplid	First Name	‡ Last Name	‡ Job Code	‡ Hours per Week	\$ Start Date	‡ End Date	Funding Program	Financial Year	Actions	‡ Status	¢ Enro Colle
[-]	[-]	[-]	[-]	[-]	[-]	[-]	[-]	[-]	[-]	[-]	[-]	[-]	Ŀ
532 (1) History	04/02/2012 , 01:35:46PM		Graduate	Student	GTA - 9184	20	08/15/2010	05/05/2011	Accounting MSA Prof track	2010-2011	View Edit Delete Start Workflow GS Hold	Not Evaluated ⊜	Busine Admini:

Click **OK** in the message box.



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A workflow started message displays and the agreement Status changes to Workflow in Progress.

Workflow started message:

Agreement ID 532 workflow has been started for student Graduate Student

Status changes to Workflow in Progress:

\$ ID	‡ Timestamp	‡ Emplid	First Name	‡ Last Name	‡ Job Code	Hours per Week	\$ Start Date	¢ End Date	Funding Program	Financial Year	Actions	\$ Status	‡ Eni Co
[-]	[-]	[-]	[-]	[-]	[-]	[-]	[-]	[-]	[-]	[-]	[-]	[-]	
532 (2) History	04/02/2012 04:26:06PM		Graduate	Student	GTA - 9184	20	08/15/2010	05/05/2011	Accounting MSA Prof track	2010-2011	View Stop Workflow	Workflow in Progress 🛡	Busir Admi

Agreement Approval

The first agreement approver receives an e-mail from gradassistantship@ucf.edu sent to their official UCF Business E-mail address.

Agreement approvers login to the Assistantship Agreements Approval website to review and approve/decline assistantship agreements. Login instructions are provided in the e-mail they receive. Agreements are approved by the DAL(s) (if included in the agreement), Agreement Approver (s), and Student. If there is more than one DAL or Agreement Approver, the agreement will go to them in the order they were added to the agreement. After logging into the Agreements Approval website, the approver:

1. Clicks on the student's agreement to review and scrolls down to see the agreement details.

2. In the Approval Signature area at the bottom of the page, approves or declines the agreement, enters a comment (optional; others in the approval workflow will see the comment, but the student will not see it), and submits the decision.

3. Selects another student's agreement to review or logs out.



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Once the agreement has received approval from all DALs and Agreement Approvers, the student receives an e-mail from <u>gradasssistantship@ucf.edu</u> sent to their UCF Knights E-mail address. After logging into the Agreement Approval website, the student:

1. Clicks on the assistantship agreement and scrolls down to see the agreement details.

2. In the Student Signature area at the bottom of the page, accepts or declines the agreement, enters a comment (optional; hiring department will see this comment), and submits the decision.

3. Logs out or selects another assistantship agreement to review.

After the agreement is fully approved, the agreement Status changes to Ready for ePAF.

Ready for ePAF

Remember to periodically check the status of your agreement. When you see that the agreement Status has changed to **Ready for ePAF**, save a copy of the agreement as a PDF before generating your ePAF. To save a copy of your agreement:

- 1. Log into GradInfo > Graduate Financials System > Agreements.
- 2. Enter your search criteria into the Search Agreements box and click Search.
- 3. Find your student in the Search Results. Click View under the Actions column.
- 4. Click the PDF button to open a PDF version of your signed agreement.
- 5. In the PDF File Download message box, Open or Save the PDF to your computer.
- 6. Create the ePAF and attach the PDF agreement.
- 7. Once you have your ePAF form type and number, return to your agreement in the Graduate Financials System.
- 8. Enter your search criteria into the **Search Agreements** box and click **Search**.
- 9. Find your student in the Search Results. Click View under the Actions column.
- 10. Click the Edit button to open the Edit view of your agreement.
- 11. Select the ePAF Type from the drop down list, enter the ePAF number, and Save Changes.