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 (http://www.admin.graduate.ucf.edu/pagegen/index.cfm?PageID=41).

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

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.
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.

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.

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.

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 or the agreement status was changed.
- 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:

<table>
<thead>
<tr>
<th>This Action</th>
<th>Does this:</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>View the assistantship agreement that has been saved.</td>
</tr>
<tr>
<td>Edit</td>
<td>Edit agreement details. You may also view Approver and Student comments, History, and other agreements the student may have.</td>
</tr>
<tr>
<td>Delete</td>
<td>Delete the agreement. A deleted agreement can be undeleted.</td>
</tr>
<tr>
<td>Start Workflow</td>
<td>Begin the agreement approval workflow.</td>
</tr>
<tr>
<td>Stop Workflow</td>
<td>Stop the agreement approval workflow.</td>
</tr>
</tbody>
</table>
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:

<table>
<thead>
<tr>
<th>This Status:</th>
<th>Means this:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Evaluated</td>
<td>Agreement details were created and saved, but the agreement has not been sent through the Agreement Approval workflow.</td>
</tr>
<tr>
<td>Workflow in Progress</td>
<td>Agreement is pending approval from DAL and Agreement approvers.</td>
</tr>
<tr>
<td></td>
<td>Note: You cannot edit the agreement until the approval workflow completes or the workflow has been stopped.</td>
</tr>
<tr>
<td>Ready for EPAF</td>
<td>Agreement has been approved by all agreement approvers and it is now ready for the ePAF.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Agreement details were cancelled. A cancelled agreement cannot be un-cancelled.</td>
</tr>
<tr>
<td>GS Approved</td>
<td>Graduate Studies has approved the ePAF and agreement.</td>
</tr>
<tr>
<td>GS Hold</td>
<td>Graduate Studies has placed the agreement on hold.</td>
</tr>
<tr>
<td>Resubmitted After Approval</td>
<td>Changes were submitted to the agreement after it was approved by Graduate Studies.</td>
</tr>
<tr>
<td>Denied</td>
<td>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.</td>
</tr>
</tbody>
</table>

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

1. **Not Evaluated** – Agreement details have been entered and saved.
2. **Workflow in Progress** – The Agreement Workflow has begun and it is pending approval from your agreement approvers and the student.
3. **Ready for EPAF** – Your agreement has been approved by your approvers and the student, and the it is now ready for ePAF.
4. **GS Approved** – Graduate Studies has reviewed and approved your ePAF and agreement.
View
Once your agreement is saved, you may view a draft 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 approval 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.

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

- View the agreement Versions/Workflow history and Workflow Status.
- Compare and review agreement versions. To do so, select the checkboxes in the **Versions/Workflow** section and click **Compare**.

- View a history of agreements created for your student.
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 Agreements Approval website using their official UCF Business E-mail address and password. The student logs in using his/her UCF Knights E-mail address and password. First-time login requires the UCF E-mail address and UCF ID Card number; after logging in, they create a password, which does not expire. If a student does not have a UCF ID Card, other instructions are provided for logging in.

Navigation: http://ww2.graduate.ucf.edu/GFS_Assistantships

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 see these 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.

If the DAL is on the agreement for multiple term rows, the DAL 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:
This is what your agreement will look like after receiving approval:
**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**.

**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.

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.
- **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 Studies Staff Guide, Student Finances > Assistantships: http://www.admin.graduate.ucf.edu/pagegen/index.cfm?PageID=41

- **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.

---

**Understanding 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.

**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 assistantship 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 Associate, 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. This information does not copy into the Agreement and is only available to view in Awards.

- **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 and 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

1. 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**.

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

3. On the Assistantship Agreement page, review the Student Information (from PeopleSoft) to verify the student's enrollment and GTA Eligibility, if applicable.

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

5. 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.

6. **Faculty Supervisor** data copies from Awards. To add a faculty supervisor, enter the **EMPLID** and click **Add**.
7. 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.

8. 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.
### Three Ways to Pay Tuition Remission

Remember, there are three ways to pay tuition remission:

- **by tuition payment,**
- **by tuition waiver** (reserved for GTAs and university fellowships only), or
- **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, contact the Office of Research & Commercialization’s (ORC) Research Administrator assigned to your college or research center, or contact the ORC main office (823-3778) for the appropriate answers.

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 tuition fee per graduate credit hour, the 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)*.
**Three Ways to Pay Tuition Remission – Continued**

**GTA Tuition Waiver**

Use the **Add** 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 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 EMPLID and Title (optional).
9. Include **Comments** (one paragraph) that may be useful when processing the agreement or may help your program. Comments entered into **Agreement Custom Message** will be seen by the student on the Assistantship Agreements Approval website.

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

**Start Agreement Workflow**

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

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

3. Click **OK** in the message box.

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

Agreement ID 532 workflow has been started for student Graduate Student (1748254)

The agreement status changes to Workflow in Progress:

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 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.
Once the agreement has received approval from all DALs and Agreement Approvers, the student receives an e-mail from gradassistantship@ucf.edu sent to their UCF Knights E-mail address. After logging into the Agreements 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.

To add the ePAF form type and number in the agreement record:

1. Once you have your ePAF form type and number, return to your agreement in the Graduate Financials System.
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 Edit button to open the Edit view of your agreement.
5. Select the ePAF Type from the drop down list, enter the ePAF number, and Save Changes.