**Appendix A**

**UM Policies on Accounts and Graduate Assistantship Payments**

**Accounts used for Graduate Assistantships:**

XX01 accounts are used for instruction

XX02 accounts are used for research

See Accounting Quick Reference Guide attachment for additional details

**Limits on Accounts:**

250119\* accounts are course fees and course fees can only be used for instructional costs that directly benefit the students who were assessed the course fees (not for research assistantships); these funds cannot be transferred to other fund accounts

XX08 accounts are used for scholarships and cannot be used to pay for graduate assistantship stipends

Note, that if there is a specific endowment, there could be an exception to the limit on using XX08 accounts to fund graduate assistantships; the Office of Financial Aid will need to verify the purpose of the funds.

**Pay Periods for Graduate Assistants:**

Stipends can be for the academic year or the semester

Stipends must meet graduate school minimums

**Appendix B**

**Scholarships and other Financial Aid**

If a department wants to provide an award to a student and does not already have an established Financial Aid (FA) code to use for doing so, they should contact the FA accounting team at [fafiscop@olemiss.edu](mailto:fafiscop@olemiss.edu).

1. If the award will be a one-time occurrence for a single individual (or a small group of students) only, then FA can use one of its own “clearing accounts” to process the transaction. No special set-up is required.
   * Requestors can just send an email to provide FA with authorization to make a transfer of funds.
   * They should include the student’s name, student ID number, amount of the award, the account number, and what term/semester to use.
2. If awards from the same account number will be made to multiple students and/or across multiple years, it may be best to set up a unique code – the “Aid ID”.
   * Upon request, the FA accountants will send a form to collect all the relevant information about the award: program name, account number, who has oversight, any processing requirements, etc.
   * Once created, the Aid ID is used by the department on an ongoing basis to submit awards through the online portal. Either of these ways will provide access:
3. Go to <https://secure25.olemiss.edu/scholarship/> and log into myOleMiss, OR

1. Search directly in myOleMiss for the “Departmental Scholarship Form” (not the Administrator version).

* With advance notice, FA can change the account number annually for that Aid ID if needed.

If a scholarship is being made from a Fund 10 account (state-appropriated money), there are IHL-mandated restrictions on the amount that can be offered.  These awards, in combination with all other aid, cannot exceed the student’s Cost of Attendance (as determined by FA).

Please be aware that any scholarship (regardless of the source of funds) can sometimes displace *other* aid (depending on the awarding policies that may apply).  FA will always make adjustments to provide the best financial package to a student while ensuring all rules are being followed.

Also note that all aid must be processed through the student’s Bursar account. If there is any outstanding balance owed the school, the funds will credit the bill first. Any excess funds will be issued to the student as a refund.

**Appendix C**

**Contracts and Grants and Student Payments**

For guidance on applying for/establishing an externally sponsored program (including those that will involve graduate assistantships or fellowships, undergraduate research experiences, or other payments to students for work or educational activities) see:

* ORSP Home Page: http://research.olemiss.edu
* Tuition Charges to Grants and Contracts: <http://research.olemiss.edu/policies/tuition-charges>
* Proposal Development Contacts: <http://research.olemiss.edu/proposal-development>
* Current Rates and Codes: <http://research.olemiss.edu/proposal-development/current-rates>

Graduate assistantships charged to external grants and contracts should also charge the in-state tuition associated with those assistantships to those sponsors, wherever permitted. Fellowships may be able to charge the entire tuition (including non-resident fees) if allowed by the sponsor agency; whereas grants that include coverage for a graduate assistantship only charge the in-state portion of that tuition. Individuals pursuing fellowship options should contact ORSP and the Graduate School to determine what is required and what is allowable with the particular funding source.

Lack of knowledge of this requirement is not a reason for ORSP to waive this requirement. Situations that allow waiver of this requirement are spelled out in the relevant policy <https://policies.olemiss.edu/ShowDetails.jsp?istatPara=1&policyObjidPara=10648727>

**Appendix D**

**Paid Experiential Learning Programs**

For guidance on establishing a paid experiential learning program at UM, see <https://research.olemiss.edu/resources/students>. These programs provide approved and coordinated pathways for paying students for participation in various types of learning programs that do not meet the definition of an employer/employee relationship, including:

* Summer and Academic Year Fellowships
* Summer Undergraduate Research Experiences
* Summer High School Research Experiences
* Internship-type programs where the provider is a third party, but the payer is UM
* Both externally and internally sponsored experiences
* Payments through the student payroll system (even when not employment);   
  payments that are considered financial aid (even if not disbursed as financial aid);  
  and payments through the procurement system (for UM student travel, or non-UM students paid as “vendors” for participating in a program).

**Appendix E**

**Fellowships and Traineeships**

* A fellowship is generally defined as a scholarship, whether from UM or an external source, which does not require service by the student. Externally funded fellowships may include full coverage of tuition as part of the educational allowance. Likewise, traineeships are usually part of federally funded programs and may or may not have teaching, research, or service requirements. Traineeships may include full coverage of tuition as a charge to the grant.
* For guidance on charging fellowship and traineeship tuitions to externally sponsored programs, see http://research.olemiss.edu/policies/tuition-charges

**Appendix F**

**Procurement**

For guidance on procurement processes and protocols, see <https://procurement.olemiss.edu/>. In particular:

* Vendor Registration: https://procurement.olemiss.edu/new-vendor-application/
* Travel Policies and Procedures: <https://procurement.olemiss.edu/travel/>
* To reimburse students for travel, if the students are not already student employees, an E-Form 18 should be processed by the paying department—choose the Student Travel Only option. Once this E-Form is approved by HR, students will receive an e-mail notifying them of documents that they must provide in person to the Student Employment office. See <https://hr.olemiss.edu/students/faqs-for-student-employment/> for instructions and required forms, which are subject to change.
* Contact Info: ???

Last updated 8.19.2020 by ASK