



Oregon State University Graduate School

Graduate School

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To: [REDACTED]

From: Nick Fleury, Director of Financial Support
Graduate School

Re: NSF Graduate Research Fellowship for 2024-2025 – Administration Guidelines

The following outlines how your 2024-2025 NSF Graduate Research Fellowship will be administered. **A few things have changed this year - please review these guidelines carefully.**

Appointment Procedures

- Based on your status as an NSF Graduate Research Fellow, you will be appointed as an OSU Graduate Fellow for this NSF-GRFP appointment year. Specifics on this appointment are in your Graduate Fellowship Offer Letter. These were sent via DocuSign on or after April 30, 2024 – contact Nick if you need a copy.
- Be sure you updated your current mailing address with OSU to ensure prompt disbursement of your stipend payment check. Payments are provided directly to you rather than through your student account.
- Information regarding Direct Deposit of stipends and reimbursements:
 - You may elect to have future stipend and reimbursement payments Direct Deposited. For a Direct Deposit option go to: <https://fa.oregonstate.edu/external-fellowships> or contact your Business Center.
 - If you are a returning fellow and already have Direct Deposit, your checks will continue to be deposited automatically.
 - If you have any questions about Direct Deposit, consult Sandi Larsen at sandra.larsen@oregonstate.edu.

Fellowship Details

[OSU Graduate Fellowships](#) are appointed to OSU as a means to acknowledge and support outstanding graduate students in pursuit of their advanced degree objectives. NSF-GRFP fellowships provide a living stipend, full graduate fellow health insurance coverage, and tuition support, and also include support for mandatory fees. OSU has no commensurate service requirement for any fellowship appointments. Graduate Fellows are not employees of OSU, and appointments are not governed by contractual bodies. However, it is the intent of the institution to ensure that an incentive remains for graduate students to seek competitive graduate fellowship support and for graduate fellows to be recognized and honored for the distinction that they bring to themselves and to the university as a result of their success.

Your NSF Fellowship provides you the following:

- An **annual stipend** of \$37,000 disbursed in installments of \$3083.33 on or before the first of the upcoming month (typically last Tuesday or Friday of prior month), provided you are registered for the required number of credits. As your appointments begins on the 16th of the month, the first and last month of your fellowship will be ½ payments, ~\$1541.68. Keep in mind that all payments are pre-paid, i.e. issued in advance, of the fellowship month, which is unlike wages.

The expected payment schedule is below (payments can take an additional 1-3 business days to credit to your financial institution or for check issuance):

- Tuesday, September 17, 2024 - \$1541.70 (1/2 Sep)
 - Friday, September 27, 2024 - \$3083.33
 - Tuesday, October 29, 2024 - \$3083.33
 - Tuesday, November 26, 2024 - \$3083.33
 - Friday, December 31, 2024 - \$3083.33
 - Friday, January 31, 2025 - \$3083.33
 - Friday, February 28, 2025 - \$3083.33
 - Friday, March 28, 2025 - \$3083.33
 - Tuesday, April 29, 2025 - \$3083.33
 - Friday, May 30, 2025 - \$3083.33
 - Friday, June 27, 2025 - \$3083.33
 - Tuesday, July 29, 2025 - \$3083.33
 - Friday, August 29, 2025 - \$1541.67 (1/2 Sep)
- A **tuition waiver and fee relief** scholarship to cover the cost for tuition and mandatory fees, for required enrollment of 12 credits each term in the academic year (fall, winter and spring) and 3 credits in summer term. Your tuition scholarship covers the cost for a maximum of 12 credits each academic term (up to 16cr if a tuition plateau is in effect for your program and taking all Corvallis-campus credits) and a maximum of 3 credits during summer term. You must be registered for the required 12 credits each academic term and 3 credits in summer term for your NSF-GRFP tuition waiver and stipends to be paid. You will be personally responsible for any tuition/fee costs resulting from enrollment beyond the required enrollment level each term.
 - Coverage for out-of-pocket charges for **fellow-only health insurance** coverage, referred to as fellow-only premium. Details of your health insurance plan are explained in your Graduate Fellowship offer letter issued via DocuSign – contact Human Resources as indicated in the letter if you have any questions.
 - A **Research Expense Allowance** in the amount of \$2458.82 which will be deposited in [REDACTED] (an institutional index) for your use. This funding is available to support your research and/or professional development activities (as well as dependent health insurance coverage if you choose - contact Benny Garcia at fellowshippayments@oregonstate.edu to get dependent coverage charges set up). Balances may be carried over from one fellowship year to the next; however, the total balance must be used by the end of your third year (36th month) of active tenure, the date you obtain your degree or are no longer an OSU graduate student, or at a date mandated by NSF, whichever is sooner.

At the end of this fellowship appointment, you will have used **12 months** of your total active tenure. *You are responsible for monitoring expenditures in this index and staying within budget limits at all times; any overages will be your personal responsibility and will be transferred to your student business account.* If you have questions about your balance in this index, contact Sandi Larsen at sandra.larsen@oregonstate.edu.

Enrollment Requirements

Academic Year: NSF Graduate Research Fellows must maintain a minimum registration level of 12 credits each term during the academic year (fall, winter, spring) to remain eligible for the Tuition Scholarship disbursed by the Graduate School. Your tuition scholarship will credit to your student account on or immediately prior to the beginning of the term. Your term fees will be covered via funding from NSF, typically credited to your student account 2-3 weeks into the academic term.

Summer Session: NSF Graduate Research Fellows must maintain a minimum registration of 3 graduate credits during summer session. Summer tuition + fees is covered via funding from NSF, typically credited to your student account by mid-July.

Appointment Interruption

NSF-GRFP fellows are expected to remain on appointment for the full 12-month period. Please reach out to Nick if any of the following pertain to you:

- Need to take leave of any kind, whether personal, family-related, medical, or other life events
- Will be completing your final degree at OSU prior to the end of the 12-month appointment
- Plan to transfer your award to another institution
- Have an external employment, internship, or volunteer opportunity that will exceed more than 10 hours of commitment/week for an extended period.

Any of the above may require termination of your current fellowship appointment at OSU. Whenever possible, please reach out at least six weeks in advance (when an expected interruption) to ensure no overpayments are made to you towards your stipend or educational expenses.

Supplementation

NSF specifies that fellows may not take on additional employment. OSU policy also prohibits any fellow from being employed in any capacity at OSU while on appointment. Fellows who wish to teach or to receive support concurrently must seek prior approval from the OSU Coordinating Official (Nick Fleury). Fellows seeking graduate assistantship support should plan to do so on a year of reserve status. Questions regarding employment (including GRA, GTA, and student hourly wage appointments) should be made via email to the Coordinating Official in the Graduate School prior to accepting the employment offer. In some cases, NSF approval will also be required.

Stipend Payments

For questions regarding stipend payments, contact:

Benny Garcia

Student Account Services, Business Affairs

Email: fellowshippayments@oregonstate.edu

Phone: (541) 737-3775

To reiterate, stipend payments are typically paid on or before the first of the month, provided you are enrolled for the required number of credits at that time. January 2025 may be issued as early as December 20th due to the holiday schedule. Please be sure you are registered for the required credits during priority registration or your payment may be delayed.

Using Your Research Allowance

NSF Fellows should work as much as possible with their respective academic unit to submit expenses and reimbursement requests via [Concur](#). We recommend purchasing through OSU systems when possible, rather than seeking personal reimbursement (documentation is required). Before using [Concur Travel and Expense for the first time](#), you must complete your profile by clicking the “Profile” link at the top left of the page, and then select Profile Settings. Check with your academic home on the best contact for Concur and use of the program.

All submissions through Concur require review approval, which is done by Nick Fleury. Reach out to Nick directly if you are awaiting for approval on a specific travel approval, expenses authorization, or reimbursement.

Your Research Allowance Index is [REDACTED], and again, **\$2458.82** has been allocated to the index. Expenditures must follow all OSU policies and regulations. The index funding is available to you effective September 1, 2024, and you are expected to use Concur for any purchases, travel authorizations, or reimbursements. Any requests or receipts prior to June 1st may not be charged to your research allowance.

For purchases using your index valued under \$1,000, work with your home department using the index(es) provided above. Purchases for one item valued at \$1,000 or more or any computer purchases require prior approval from the NSF Coordinating Official (Nick Fleury). Requests must be submitted via email and contain the following information:

1. need for the expense and appropriateness to degree program,
2. endorsement from major professor, and
3. proposed disposition of equipment upon completion of degree program.

For your research allowance balance details, contact:

Sandi Larsen
Grants & Contracts Coordinator - UABC
Email: sandra.larsen@oregonstate.edu
Phone: (541) 737-0916

Research Ethics Requirement (i.e. RCR)

The National Science Foundation requires that all NSF-GRFP Fellows at OSU to participate in both online and face-to-face Responsible Conduct of Research (RCR) training. This training must be completed by the end of your first year of active tenure.

Required online training (at no charge):

- [CITI RCR web course](#) (required; electronic certification) - Log in to citiprogram.org and affiliate with OSU. You must use your OSU email address for the primary and institutional addresses in the CITI registration. Complete the relevant RCR course. Options include: Biomedical, social behavioral, physical science, humanities, and engineering.

Required face-to-face training:

- Complete any of the three courses listed at <https://research.oregonstate.edu/prrp/training-resources>
- Discuss one or more of the ten (listed under [GRAD 520](#)) primary topics of ethics of research with your advisor, or
- Complete other approved in-person research ethics training.

The RCR requirements must be completed by end of your first year of NSF GRFP active tenure. If you have not done so, please be sure to submit documentation to Nick Fleury. You may also visit the Current Fellows tab on the Graduate School's [National Science Foundation Award](#) page.

NSF Reporting and Acknowledgement Requirements

NSF Graduate Research Fellows must submit an annual activities report to NSF each year. The activities report is required of all fellows, whether on tenure, reserve, or any other status and are of particular importance for fellows who are finishing the third year of support as they are the ones most likely to have reached advanced levels of accomplishment. These reports are typically due no later than May 1 (date subject to change by NSF).

Tenure declarations must be submitted through NSF Fastlane each year no later than May 1. Note that your annual activities report must be completed before you will be permitted to submit a tenure request.

It is your responsibility to know and understand the reporting requirements of your NSF Fellowship. Please be sure to respond to emails from NSF, provide necessary reports and meet all deadlines. Check Fastlane periodically to make sure you are in compliance with your fellowship requirements.

As the recipient of the NSF-GRFP, you are required to acknowledge support for all federally funded grants. Each agency has its own verbiage and requirements. You must include an NSF Support Acknowledgement for works produced (i.e., books, journal articles, conference proceedings, posters, slides). The disclaimer must be orally acknowledged during all news media interviews, including popular media such as radio, television, and news. Fellows should provide the grant number/base award number as follows:

Acknowledgement: **"This material is based upon work supported by the National Science Foundation under Grant No. 2234662"**. This number should remain effective through the 2027-2028 academic year for fall start fellows.

Tax Issues

Some or all of each scholarship or fellowship payment you receive may be taxable, depending on your personal circumstances. For general information regarding scholarship and fellowship taxability, visit <https://fa.oregonstate.edu/controllers-unit/student-accounts/student-payment-taxability-resource>. Please note that use of this site does not constitute professional advisement. OSU employees, while in their official role at the university, are not authorized to act as tax consultants or provide personal tax advice. For personal tax questions, individuals should consult with a professional tax advisor.

A few key points to note:

- OSU does not withhold tax from the stipend. For the current and upcoming tax years, fellows should contact accounts.payable@oregonstate.edu after February 1, 2025 to obtain the amount for tax reporting in the 2024 tax year. This process may require contacting another person for the information after Accounts Payable, but you must first contact them to determine who is authorized to release the information. Fellows are responsible for seeking external guidance on tax liability for stipend payments. It is up to the fellow to report this on their tax returns.
- Fellows are encouraged to contact the IRS or a tax accountant for guidance concerning their liability. OSU employees are prohibited from offering any tax advice. Students are responsible for reporting these payments and remitting any tax due with their personal income tax return at the end of the year on Form 1040 and the corresponding state forms.
- Generally, you report any portion of a scholarship, a fellowship grant, or other grant that you must include in gross income as outlined at <https://www.irs.gov/taxtopics/tc421>

The [Center for Advancing Financial Education](#) (CAFE) does provide financial education resources, including [Volunteer Income Tax Assistance](#) to qualifying students.

Your Primary OSU Contact

Administration of your NSF award is through OSU's Coordinating Official.

Nick Fleury, Director of Financial Support
Oregon State University Graduate School
Email: nick.fleury@oregonstate.edu
Phone: (541) 737-0450

Reach out to Nick with questions regarding fellowship status changes, program of study changes, external work/research involvement, fellowship time commitment, tuition support/enrollment concerns, faculty mentor relationship, and award transfer, or any other related topics.

PLEASE SIGN below, provide your phone, additional email address, and Faculty Advisor information, by Friday, August 30, 2024.

I have reviewed the NSF Graduate Research Fellows Administration Guidelines.

[Redacted] Date

Please provide your phone number and non-OSU email address:

Phone

Non-OSU Email Address

Please provide the name and email address of your current Faculty Advisor:

Name

Email Address