Docusign PAF Instructions

1. Verify the student is registered in at least 6 credit hours prior to forwarding the PAF to Graduate Studies.

2. All information on the top of the PAF must be completed including RACE, **CITIZENSHIP**, and **VISA STATUS** (normally F-1).

3. PAF EFFECTIVE date and EXPIRATION date must match the Offer Letter.

4. For TA and SA positions the effective date and expiration date must match the dates posted on the Graduate Studies website which are:

   a. Support – 1st day of class: Last day of class

   b. Teaching (GTA or TA) – 1 week prior to first day of class: Last day of finals week

5. The student must be in full standing to be eligible for a GA position. Provisionally admitted students do not qualify for a GA position. (Policy 274)

6. Student must be enrolled in 6 hours for a 100% or 50% Assistantship.

7. A one-hour exception to the 6-hour GA enrollment requirement is only authorized when a student has completed ALL of their coursework and needs one semester to finish their research/paper. They must have completed a graduation application for the exception semester. In addition, the exception is only allowed for one semester. The student may submit a Request for Exception to University Policy form, or a memorandum from the department may be submitted that is signed by the department chair and dean of the college and approved by the dean of COGS.

8. Budget/Pay Information Block: You must complete the NBAJOBS and FIN AID blocks by providing the Index(s) for stipend and fees, % employed, total paid for stipend, Financial Aid Fund Code, and Detail Code. On the Labor Distribution block FOAP, you will only include the FOAPL for the stipend.

9. Offer Letter: We have a template on the COGS website that can be used by any department on campus. The department is authorized to modify and customize as needed.

10. PAF submission deadlines are listed on COGS website and are as follows:

Fall: July 27th

Spring: November 23rd

Summer: April 27th

11. Errors: COGS will decline a PAF if there are errors. Common errors are TA and SA start and end date issues. Omissions on the PAF will also result in a decline. Be sure and look in Banner for student citizenship and Visa status. If you are not sure of what to put in a box, contact COGS. You can find citizenship status on the Banner screen SPAIDEN.

    a. Note: The declined PAF goes back to the initiator.

    b. Note: The email that cancels the PAF sounds "harsh", this is an automated email and should not be viewed as harsh.

12. Understand how the posting of tuition and fees is completed: When your PAF goes to Financial Aid, the GA will be posted to the student account as 100% or 50%. Every evening Banner looks at the student record and ensures that 100% or 50% of the tuition and fees are paid. If the student makes a change (i.e. adds a class), Banner will adjust payment to ensure the student is adjusted accordingly. This is an important automated process.

13. The **SPECIAL** PAF: from the "TYPE OF PAF" pull down menu is an option called "Special". The designation of Special as the PAF type tells Financial Aid that they will have to manually enter the financial information on the PAF into Banner. The Special PAF allows a department (usually a Center) to manually define the amount of the tuition that will be paid through the index code. For example, a Center may have only $2,500 available in a grant index, the Center may tell Financial Aid in the REMARKS section to pay $2,500 from index 1 and pay the remaining $1,650 from index 2. The most important part of

this process is being very specific on the amounts that are to be paid which requires looking at the tuition and fees balance. Financial Aid will not do calculations for this allocation of fees. It is important to note that <u>All</u> automation of payment of tuition and fees (as described previously) is lost when a student is manually coded. For questions on this process contact COGS.

14. Changes cannot be made over the phone, a CHANGE PAF must be completed. Financial Aid and HR must have a Change PAF.

15. Making Changes: To make a change, you will create a new PAF and in the "TYPE OF PAF" box, you will select "CHANGE". Complete the PAF and incorporate your changes. You must *provide details* in the **REMARKS** box about the change taking place.

    a. NOTE: If you need to change a PAF and that PAF will change the INDEX code and a different signature authority will sign the PAF, then you will need to send a CANCEL PAF through first, then create a NEW PAF with the appropriate information.

16. All initiators get a copy of the PAF once it is completed.

17. Advise the student to complete the HR hiring paperwork (I9 and W4) with HR as soon as the student is offered the GA position.

18. Watch for duplicates – no need to create a second PAF unless you are notified. The PAF goes through an extensive approval process and it may take time for it to get through that process. To find out the status of the PAF, login to Docusign and you can view the status on the history tab of **OTHER ACTIONS**. You are also welcome to contact COGS and we will look it up for you.

19. Download and save your PAF before you hit "Finish". This way you will have a copy in the event that you need it before you receive the completed copy. COGS will also have a copy if you need it.

20. GA Pay: GA's are treated like employees when it comes to the payment of the stipend. HR will process the stipend to pay on the last working day of the month (just like our payday).

    a. Note: Student workers who are paid using TIMECLOCK are paid on the 10th of the month. So, in the event you have a GA working as a GA and as a student worker, they will receive two paychecks.

    b. Note: A graduate student is not allowed to work more than 29 hours per week at TTU. A graduate student may work 20 hours as a GA and also be hired as a student worker for the additional 9 hours. It is up to the hiring department to verify that a student does not go over the 29-hour HR defined limit. (Policy 642)

    c. Healthcare benefits are not available through TTU but plans are available through the TBR website:

    http://www.tbrstudenthealthinsuranceexchange.com/

    d. Hours and Holidays: GA's are to work within the dates of the PAF. GA's are to work when the university is open. The department will coordinate the student schedule to ensure the required hours are met each week. GA's are required during spring and fall breaks just like employees are required to.

21. Changes and Cancels at the end of the semester. If you think your student may leave TTU during the summer to go on an internship or co-op, you should end the initial PAF

(fall and summer) on May 1 or the last day of classes. This will ensure that the student is not overpaid in May. If your student decides to work at TTU as a GA in the summer, it is easy and quick to create a new May-July PAF.

22. December graduates with Fall/Spring PAF's. It is your responsibility to submit a Cancel PAF if your student graduates in December. Be sure to submit a Cancel PAF on the last day or classes, if not earlier, in order to stop the stipend.

23. Probation and Dismissal. Remember only students in good standing and full standing are allowed to be hired as GA's. It is your responsibility to look at the GPA's and status of your GA's. In the event a student is dismissed or put on probation, you must complete a Cancel PAF to end the award.

Frequently Asked Questions

1. May-semester aka 'maymester'. When do I create a PAF for the May-semester?

   a. The May semester is to be included in the Summer PAF with a start date of the first day of the intercession.

2. When are tax deductions incurred for GA's?

   a. SA's are liable for taxes in Fall and Spring.

   b. ALL students incur taxes for the summer semester.

   c. FICA is excluded as a deduction UNLESS the student is not enrolled (i.e. summer start of 7/1).

3. What if I have completed the offer letter and the student is coming later than anticipated?

   a. If a student has a late arrival and their start date differs from what is on the offer letter, an email must be attached to reflect the difference in the dates and that the student confirms their understanding of the change. Remember the offer letter is a contract so work dates must align with the contract.

4. Can I submit a PAF after the student has already started working?

   a. For liability protection for both TTU and the student, a student should not work until their Offer Letter and PAF have been approved.

   b. International students must be on-site and working when the PAF start date arrives. If they are not, you must send through a Change PAF with a new start date and memo to the student.

5. I have funds from our grant/account to pay for the student's summer fees. Can I do this?

    a. The GA award must include both fees/tuition and stipend. A student may not receive funding for tuition and fees without working. So, no, you can not just pay tuition and fees. It is a package program that includes, tuition/fees, stipend and a work commitment.

6. My GA can perform their duties from a remote location because they are just doing research and/or programming for me, can the GA do that?

    a. No. The policy states that the student must work at a TTU location under a designated supervisor.

7. My student didn't provide HR with the documentation they needed and ended up not being paid this month. What can we do?

    a. Once the student provides the I9, SSN or other items needed by HR, Payroll will allow a student to request emergency pay – which is a pay advance from their next check. They will do this for the number of hours they worked in that month.