Chapter 8: Guide for Graduate Student Researchers

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Graduate Student Researchers (GSRs)

A Graduate Student Researcher is a registered graduate student who performs research under the direction of a faculty member.

GSRs may be appointed up to 49.99% during the academic months and up to 100% during the summer with the home department’s approval. Since summer dates vary from year to year, the Graduate Division will send out an annual announcement outlining the specific dates, as well as summer policies and procedures. Please subscribe to the Grad Employment list serv in order to receive these announcements. Effective the first day of Fall Quarter, the student will need to drop back to 49.99%.

GSR Childbirth and/or Childcare Benefits

GSRs may be eligible for childbirth and/or childcare benefits. Further details can be found at: [http://grad.ucsd.edu/financial/employment/benefits/support-for-student-parents.html](http://grad.ucsd.edu/financial/employment/benefits/support-for-student-parents.html)

Title Codes

The 3266 title code is always used during the period 7/1 - 9/30 and during the academic year for students not eligible for the GSR tuition-and-fee (GSRTF) remission program.

The 3262, 3263, 3264, 3284, 3285, 3286, or 3287 title codes are used when a graduate student is eligible for the GSR tuition-and-fee remission (GSRTF) program.

A student eligible for GSRTF is appointed on the title code (GSRTF Pool) of the student’s home department/program (where the student is pursuing a degree) as follows:

- 3262 - CSE (Computer Science & Engineering)
- 3263 - MAE (Mechanical & Aerospace Engineering)/CENG/NENG
- 3264 - SE (Structural Engineering)
- 3284 - General (all other departments and programs)*
- 3285 - ECE (Electrical & Computer Engineering)
- 3286 - Physics
- 3287 - SIO (Scripps Institution of Oceanography)

For the Materials Science interdisciplinary graduate program, the title code should be that of the primary department of the student’s advisor.
GSR Tuition and Fee Remission (GSRTF)

General Information

A Graduate Student Researcher (GSR) who meets the eligibility criteria for GSRTF (see “Eligibility”) has their mandatory tuition/fees paid as a perquisite of employment. Currently these required tuition/fees are: Nonresident Supplemental Tuition (if applicable), Tuition, Student Services Fee, University Center Fee, Recreation Facility Fee, Graduate Student Association Fee, Student Transportation Fee and Health Insurance.

The fund source that pays the GSR salary is assessed an average monthly charge for the cost of GSR tuition-and-fee remission (GSRTF). The charging of tuition-and-fee remission to federally sponsored research grants and contracts was approved for the San Diego Campus by the department of Health and Human Services on August 3, 1984.

Eligibility

A Graduate Student Researcher must satisfy all the following conditions in order to qualify for tuition and fee remission:

1. Be appointed for a minimum 25% time for the full quarter in which tuition and fees are paid, or the dollar equivalent (e.g., 50% for half the quarter). Note: the dollar equivalent is calculated using quarter dates.
2. Have an appointment effective with the first week of instruction in the quarter for which tuition and fees are paid.
3. Be within campus time limits for support.
4. For Non Resident Supplemental Tuition remission, be within the first year of graduate study at UCSD (unless an international student). US citizens and permanent residents should establish California residency by the start of their second year.
5. Not have a fellowship or traineeship which provides tuition and fees. See page 8-5 for details.

Appointment Dates in PPS

This is a nine-month program from October to June. The academic year is divided into three segments, with a three month period per quarter as follows:

<table>
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<th>Period</th>
<th>Dates</th>
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<td>Fall Quarter</td>
<td>October through December (10/1 - 12/31)</td>
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<td>Winter Period</td>
<td>January through March (1/1 - 3/31)</td>
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<tr>
<td>Spring Period</td>
<td>April through June (4/1 - 6/30)</td>
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During each of the quarter periods indicated above, a student may not be appointed at the same time using the GSR title code 3266 and the GSRTF title code(s) 3262, 3263, 3264, 3284, 3285, 3286, 3287. A student is either eligible for the GSRTF program for all months during the quarter period or not eligible (title code 3266) for GSRTF during the period.

The GSRTF monthly assessment (average rate) is prorated when an eligible GSRTF is paid from more than one fund source during the same month. Refer to Chapter 8, page 7, “Split Funded.”

GSRTF Payments

Eligible GSRs’ tuition and fees are paid quarterly on an actual rate basis by the Graduate Division. The student’s home academic department is responsible for submitting GSRTF payment requests online using the Graduate Division Financial Support Request Tool at https://goapp.ucsd.edu/financial/.

GSRTF Pools and Average rates

There are seven separate GSRTF pools (CSE, ECE, MAE, SE, PHYS, SIO, General) that have a corresponding GSRTF title code and average rate (see calculation below). Based on the title code entered in PPS, the corresponding rate is charged to the salary fund source on a monthly basis to collect monies for the GSRTF payments issued on the student’s behalf.

The average monthly rate for each GSRTF Pool is published by the Office of Contract and Grant Administration (OCGA) and updated on their website in August/September each year.

The average monthly rates (and GSR salary/step levels) also appear on the Student Academic Title Rates chart on the Graduate Division website: http://grad.ucsd.edu/financial/employment/academic-payrates.html

Each GSRTF Pool’s annual charge is calculated by summing the projected tuition and fees to be paid by all GSRs in the specific GSRTF Pool in the upcoming year, adding any deficit or subtracting any surplus from the Pool’s previous year’s account, and dividing this number by the projected number of eligible GSRs in the specific Pool. Surpluses and deficits are not shared with other GSRTF Pool accounts.

All proposals which request GSR salaries should include requests for GSR Tuition-and-Fee Remission at the average rate for the projected GSR's graduate department/program. GSRTF continues to be excluded from indirect costs.
For those individual extramural funds that do not accept the GSRTF assessment (ex. American Cancer, American Heart, March of Dimes) the appropriate monthly charge (average rate) will be debited against the special GSRTF Clearing Account which the Graduate Division administers. The department must complete the GSRTF Clearing Account or Recharge Action Form (available here: http://grad.ucsd.edu/files/financial/GSRTF%20Recharge%20Form.pdf) and submit it to the Graduate Division.

The Graduate Division has overall fiscal responsibility for managing the seven GSRTF accounts. Each year in July/August the Graduate Division works with the GSRTF Pool departments to determine and recommend monthly average rates to go into affect the following October 1.

In 1985, all Department Chairs agreed that those departments in the General Pool and using title code 3284 will have their fellowship block grant adjusted by the amount of the department's over or underpayment to the General Pool. The Graduate Division manages this process.

GSR Step Levels

Each graduate academic department/program has established a support policy for all of their graduate students and a GSR step level(s) to provide support at a certain level. All GSRs in the same academic department/program are appointed to the GSR step level(s) as established by the student’s academic home department or program (not the fund source).

Use of the GSR title was adopted in 1995 by UCSD (previously we used the Research Assistant title). All requests for use of GSR step level(s) are submitted by the Chair of the academic department/program to the Dean of the Graduate Division for review and approval.

The following is a list of academic department/programs with approved GSR step level(s):

Anthropology
Bioengineering
Bioinformatics
Biology
Biomedical Sciences
Chemical Engineering
Chemistry and Biochemistry
Clinical Psychology
Cognitive Science
Communication
Computer Science & Engineering
Economics
Education Studies
Education Studies
Electrical & Computer Engineering
Ethnic Studies
Global Policy and Strategy (GPS)
History
Language & Communicative Disorders
Latin American Studies
Linguistics
Literature
Materials Science & Engineering
Mathematics
Mathematics & Science Education
Mechanical & Aerospace Engineering
Mechanical & Aerospace Engineering
Molecular Pathology
Music
Nanoengineering
Neurosciences
Philosophy
Physics
Political Science
Psychology
Public Health-Epidemiology
Public Health-Health Behavior
Rady School of Management, Ph.D.
Scripps Institution of Oceanography
Sociology
Structural Engineering
Theatre & Dance
Visual Arts
GSR 1 & 4 (step 4 effective 10/1/09)
GSR 9 (effective 9/13, previously Step 8)
GSR 9 (effective 9/12, previously Step 8)
GSR 10 (effective 7/09, previously Step 9)
GSR 10 (effective 9/11, previously Step 9)
GSR 7-8 (effective 10/16, previously Step 5-6)
GSR 8 (effective 10/11, previously Step 7)
GSR 6
GSR 6 (effective 7/11, previously Step 4)
GSR 5 (effective 7/16, previously Step 2)
GSR 7-8 (effective 10/2017)
GSR 5 (effective 09/17, prev Step 4)
GSR 1-2 (effective 9/14 for M.Ed. students, previously Step 1)
GSR 1-4 (effective 9/14 for Ed.D. & Ph.D. students, previously Step 1)
GSR 7 (effective 7/08, previously Step 6)
GSR 2 (effective 7/07, previously Step 1)
GSR 1
GSR 1
GSR 6 (effective 7/19, previously Step 2)
GSR 1
GSR 5 & 7 (effective 7/09, previously Step 1 & 3)
GSR 1-4 (2)
GSR 6-7 (effective 7/16, previously Step 5-6)
GSR 5 (effective 7/06, previously Step 1)
GSR 4
GSR 4 (effective 7/14, for Master’s students, previously Step 1)
GSR 6-7 (effective 7/14, for Ph.D. students, previously Step 4-6)
GSR 10 (effective 9/11, previously step 9)
GSR 1
GSR 7-8 (effective 10/16, previously step 5-6)
GSR 10 (effective 9/11, previously step 9)
GSR 1
GSR 6-7 (effective 7/07, previously Step 4)
GSR 6 (effective 10/16, previously Step 2-4)
GSR 7 (effective 10/11, previously Step 5)
GSR 4
GSR 4
GSR 4-6
GSR 10 (effective 9/18, previously Step 8)
GSR 5 (effective 7/18, previously Step 2)
GSR 5-7 (effective 10/15, previously Step 4-6)
GSR 1 & 4
GSR 1

Click here for the printer-friendly version of the GSR Step Levels.

GSR Appointments Not Eligible for GSRTF

There are some situations when a Graduate Student Researcher, even though appointed at 25% or more during a quarter, is not eligible to be on the GSR Tuition-and-Fee Remission program.

1. A student has an extramural fellowship or traineeship that pays full tuition/fees (and a monthly stipend) and the extramural fellowship or traineeship is the primary award.
   If a student receives an extramural fellowship with a monthly stipend and full tuition/fee payment, and the total stipend amount for the quarter exceeds the monthly GSR salary for the quarter, the GSR would not be eligible for GSRTF. The GSR would be appointed on title code 3266 (salary only).
   In the “comments” section of the payroll action, the department must provide an explanation why the student is not eligible for GSRTF (ex. “Student not eligible for GSRTF – Fellowship pays full tuition/fees and is the primary award”).

2. A student’s tuition/fees are already paid by an outside (non-block grant) fund source.
   For example, an international student has his tuition/fees paid by his home government. His GSR appointment would be on title code 3266 (salary only). A copy of the outside award must be on file in the Graduate Division. The payroll action comments section must include an explanation why the student is not eligible for GSRTF such as: ”Student not eligible for GSRTF – Canada Council Award pays full tuition/fees”.

3. A student in one of the Joint Doctoral Programs between UCSD/SDSU pays registration tuition/fees at San Diego State University.

   **Example**

   A student is in the Clinical Psychology Joint Doctoral program and is paying tuition/fees at SDSU. A GSR appointment will be on title code 3266 (salary only). The payroll action comments should state: “Clinical Psychology Joint Doctoral Program. Not eligible for GSRTF. Tuition/Fees paid at SDSU.”

   The following Joint Doctoral Programs employ GSRs meeting the criteria listed in #3: Clinical Psychology, Mathematics and Science Education, and Public Health.

**Joint Doctoral Students**
If a student in a joint doctoral program is paying tuition/fees at UCSD, and meets the GSRTF eligibility criteria, then the student must be employed as a GSR on the tuition-and-fee remission program (GSRTF).

GSR Without Salary (WOS)

During the summer and academic year, there are continuing graduate students who are engaged in research and studies towards their degrees but they do not have any salaried appointments as Graduate Student Researchers (GSRs). To accommodate this situation, Graduate Division allows the graduate academic department (Home Dept in the Payroll system) to appoint continuing graduate students in their department as "Graduate Student Researchers without Salary." New hires and students on leave of absence may not be appointed as a GSR without salary.

A funding source outside of the student's graduate academic department will not be able to make use of this title since it is the responsibility of the student's academic department/group to monitor students' progress, verify ongoing research activities, coordinate all Payroll actions and to separate a student who is taking leave of absence, graduating or not continuing in the program.

If your dept has not previously made use of this title, you should discuss this option with the appropriate staff and faculty in the department. Most departments (Home Depts) have already established an index that is used for faculty appointments without salary (PPS Code = "WOS" and fund number = "00000A") which may be used for GSRs without salary. However, your department may choose to establish a new index for these appointments.

GSR (WOS) Data Entry Guidelines for Title Code 3266 (WOS)

**Appointment Line:**

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(ex. 07/01/xx)

(ex. 09/30/xx)

Academic (Home) Dept Code

3266

0.00 or Leave Blank
F
Leave Blank
A
MO
N (No time sheet)
N (No leave accrual)

**Distribution Line:**

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<th>(ex. 09/30/xx)</th>
<th>0.00 or Leave Blank</th>
<th>Leave Blank</th>
<th>WOS (without salary)</th>
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</thead>
</table>

**Comments:**
GSRTF Formulas for GSRTF Assessment

Prorated Monthly Assessment

The GSRTF monthly assessment is prorated when a GSR's total pay for a month is less than 25% time.

(a) \[
\text{Amount paid during a month} \times 100 = \% \text{ of total month worked}
\]

100% Monthly Rate

(b) \[
(\% \text{ of total month worked}) \times 4 \times (\text{GSRTF Mo. Assessment}) = \text{Prorated Mo. Assessment}
\]

Another way to calculate this is as follows:

(a) \[
(\text{Partial Month Factor}) \times (\% \text{ Employed}) = \% \text{ of total month worked}
\]

(b) \[
(\% \text{ of total mo. worked}) \times 4 \times (\text{GSRTF Monthly Assessment}) = \text{Prorated Monthly Assessment}
\]

Split-Funded GSRTF

The GSRTF monthly assessment is prorated when an eligible GSR is paid from more than one fund source during the same month. If the GSR is split funded, the system will calculate the monthly assessment for each fund source as follows:

1. \[
\frac{100}{\text{Total % Worked}} = \text{Factor (to 4 decimal places)}
\]

2. \[
\text{Factor} \times (\% \text{ worked on one fund source}) \times (\text{GSRTF Mo. Assessment}) = \text{Split funded Mo. Assessment}
\]

Determining a Fixed Dollar Amount for Split-Funded GSRTF

Sometimes a fund source has only enough money to pay a certain amount during a particular month or quarter. You can use the following formula for these situations.

1. Determine the total sum of monthly GSR salary and GSR assessment
2. Divide the fund source A amount by #1 answer
3. Multiply #2 answer x % employed = % to employ on fund source A

Example:

Fund source A can only pay $500.00.

Student is paid 48% at $2795/mo; Remission = $840

a. $1341.60 + $840 = $2181.60
b. $500 divided by $2181.60 = 22.9189
c. 22.9189 x 48% = 11.00%

Answer:

Fund source A = 11% ($307.45 salary + $192.50 remission = Total $499.95)
Fund source B = 37%

Split-Funding a GSR Appointment with a TA Appointment

The tuition/fee payment for a graduate student employed simultaneously as a 25% Teaching Assistant and a 25% Graduate Student Researcher will be paid in full via GSR Tuition Fee Remission. The GSR salary fund source will be charged the full GSRTF rate through PPS as usual.

GSR Partial Month Payment Formula
You can use the following Partial Month Factor Chart to calculate how much a GSR will be paid when employed for only part of a month.

To determine the number of days in a month, count all Mondays – Fridays; including holidays.

For all calculations; figure to 6 decimals and round to 4 decimals.

The payroll formula is:

1. (Partial Month Factor) x (Percent Time Employed) = Y

1. (Y) x (Monthly Pay rate) = Amount paid

Example:

Student worked 7 days out of 22 day month; 49.31% at $2966/month

1. (.3182) x (.4931) = .1569
2. (.1569) x ($2966) = $465.37

Chart of Partial Month Factors

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</table>
### GSR Data Entry Guidelines

**Graduate Student Researcher – #3266 (Not eligible for Tuition-and-Fee Remission)**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>Type</td>
<td>Appointment Type</td>
</tr>
<tr>
<td>Basis</td>
<td>Basis of the appointment</td>
</tr>
<tr>
<td>Pd Ovr</td>
<td>Payroll Overhead</td>
</tr>
<tr>
<td>Appt Begin</td>
<td>Appointment Begin Date</td>
</tr>
<tr>
<td>Appt End</td>
<td>Appointment End Date</td>
</tr>
<tr>
<td>Dept</td>
<td>Department of the appointment</td>
</tr>
<tr>
<td>Title</td>
<td>Title of the appointment</td>
</tr>
<tr>
<td>% Full</td>
<td>Percentage of full time</td>
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<tr>
<td>F/V</td>
<td>Full Time/Fixed Time</td>
</tr>
<tr>
<td>Annual</td>
<td>Annual Salary</td>
</tr>
<tr>
<td>Rt</td>
<td>Rate Type</td>
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<tr>
<td>Sch</td>
<td>Schedule</td>
</tr>
<tr>
<td>Time</td>
<td>Time of the appointment</td>
</tr>
<tr>
<td>Lv</td>
<td>Leave Accrual</td>
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#### Distribution Line

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<tbody>
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<td>Dist %</td>
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</tr>
<tr>
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<tr>
<td>Step</td>
<td></td>
</tr>
<tr>
<td>DOS code</td>
<td></td>
</tr>
</tbody>
</table>

**Notes:**

- Round off, example 0.1599 will become 0.16
- F (fixed)
- Can leave blank, 11/12 will trigger system to multiply monthly rate by 12 to equal the annual amount
- A (Annual)
- MO (Monthly)
- N = No Time Sheet
- N = No leave accrual
- 3266: Funding source 6-digit dept. code number

---

The appointment begin and end dates should reflect the period of the appointment; Fall GSRs are most often appointed from mid-September to 12/31, Winter appointments are usually 1/1 – 3/31, and Spring appointments are usually 4/1 – 6/30.

*Percent Time: If the GSR is appointed at 25% time or more for Fall, Winter or Spring quarters, the student must be on the GSRTF (3262, 3263, 3264, 3284, 3285, 3286, 3287) title codes unless the student is not eligible for one of the reasons outlined earlier in this chapter.

---

**Graduate Student Researcher Tuition and Fee Remission for Title codes 3262, 3263, 3264, 3284, 3285, 3286, 3287**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>Type</td>
<td>Appointment Type</td>
</tr>
<tr>
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<tr>
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<td>Rate Type</td>
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<td>Sch</td>
<td>Schedule</td>
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<tr>
<td>Time</td>
<td>Time of the appointment</td>
</tr>
<tr>
<td>Lv</td>
<td>Leave Accrual</td>
</tr>
</tbody>
</table>
See Below
See Below
Funding source 6 digit dept. code number
3284 (or 3262, 3263, 3264, 3285, 3286, or 3287)
Round off, example 0.4999 will become 0.50
F (fixed)
Can leave blank, 11/12 will trigger system to multiply the monthly rate by 12 to equal the annual amount
A (Annual)
MO (Monthly)
N = No Time Sheet
N = No leave accrual
Distribution Line
Index
Sub
Dist %
Pay Begin
Pay End
Rate/Amount
Step
DOS code
Your index
0
Fill in exact percent, example, 0.4999
See Below
See Below
XXXX.XX (Refer to salary rate chart)
1 (through 10) (Refer to step level chart)
REG

Appointment Begin and End Dates
The GSRTF title codes 3262, 3263, 3264, 3284, 3285, 3286, or 3287 can only be used during the period 10/1 – 6/30. This nine-month period is divided into three segments of three full months for each quarter, and appointments usually reflect these dates:
Fall = 10/1 – 12/31; Winter = 1/1 – 3/31, and Spring = 4/1 – 6/30. Use MMDDYY format.

Graduate Student Researcher New Hire Data Collection Worksheet

<table>
<thead>
<tr>
<th>EEID</th>
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<tbody>
<tr>
<td>Social Security Number</td>
<td>____________</td>
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<tr>
<td>First Name</td>
<td>____________</td>
</tr>
<tr>
<td>Middle</td>
<td>____________</td>
</tr>
<tr>
<td>Last Name</td>
<td>____________</td>
</tr>
<tr>
<td>Suffix</td>
<td>____________</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>____________</td>
</tr>
</tbody>
</table>

(Press Enter to look for errors before proceeding to the next screen)
EPD1

Sex: _____ (M or F)
Hispanic: __________
American Indian or Alaska Native: _____ Asian: _____ Black/African American: _____
Native Hawaiian or Other Pacific Islander: _____ White: _____
Primary Ethnic/Race: _____ (see Demographic Data Codes)
Disable Status: _____ (see Demographic Data Codes)
Veteran Status Codes – Vietnam: _____ War/Campaign: _____ Oth Status: _____ Serv Medal: _____
(N or V) (N or E) (see Demographic Data Codes)
Recently Separated Veteran Date: _____
Citizenship: _____
(C=Citizen, R=Resident Alien, N=Non-Resident Alien, A=Canada, Mexico, S. Korea, S=India)
Student Status: 4 No. of Reg. Units: _____

EPD2

Oath Signature Date: 1001XX The Oath must be signed on or before the first day or employment.
I-9 Date: 1001XX Employees must complete and sign Section 1 of Form I-9 no later than the first day of employment, but not before accepting a job offer.

EADR

Permanent Address Line 1: (use only for PO Box, route number, or c/o line)
Line 2: 215 Main Street
City: San Diego State: CA Zip: 92101
Home Phone: ______
Location Release Codes – Perm Address: _____ Home Phone: _____ Spouse Name: _____
(Blank=No, do not release information, Y=Yes, release information, N=Now, do not release information)

EE Org/Union Disclosures – Perm Address: _____ Home Phone: _____
(Blank=No, do not release information, Y=Yes, release information, N=Now, do not release information)
Mail Code: 0003 This is where paycheck and W-2 are sent, if not sent electronically.

ETAX

Refer to payroll instructions for a non-resident alien and student’s completed W-4 Form.
Federal
Marital Status: _____ (M)arried or (S)ingle
Personal Allowances: ______
California
Marital Status: _____ (M)arried or (S)ingle or (H)ead of Household
Personal Allowances: ______
Itemized Deductions: ______
Addl Fed Tax Withholding: _____ (leave blank)
EALN

For non-US citizens only. Refer to payroll instructions.

Country of Residence: _____ U.S. Date of Entry: _____ Visa Type: _____ Work Permit End Date: _____ (F-1: see line 5 on I-20; J-1: see line 3 of DS-2019)

EAPC

Appointment

Type: 5 Bas: 11 Pd Ovr: 12 Appt Begin: 1001XX Appt End: 0630XX Dur: _ Dept: 000123

(5, Academic) (11=GSR or 9=ASE) (12=GSR or 9=ASE)

Title: 3284 %Full: 0.50 F/V: F Ann/Hr Rate: _____ Rt: A Sch: MO Time: N LV: N

(Rate: A=annual, H=hourly, B=by agreement) (Schedule: MO or BW) (Time: N or A=timesheet) (Leave: N)

Distribution

Index: XXXXXX Sub: 0 Dis %: 0.4999 PayBeg: 1001XX PayEnd: 0630XX Step: 1 Rate/Amt: XXXX XX DOS: REG

(Sub: 0=TA, Assoc, GSR; Sub 2=Reader, Tutor) (GSR only)

EPER

Assigned BELI: 5 Effective Date: 1001XX

Date of Hire: 1001XX Original Hire Date: 1001XX

Employee Relations Code: E

Home Department: _____ Must be student’s Academic Home Department

Employee Relations Unit: 99 99=GSR, BX=ASE (System will auto-populate if ERC is “E”)

Timekeeper Code: _____

College Code: 00

Comments:

GSRTF 3284, 49.99% 10/01/XX-06/30/XX