OSU GRADUATE SCHOOL

FEE MATCH REQUESTS

General Information

Compatible with all current web browsers.
Pop-up blockers should be disabled for the site for proper functioning of the forms.
Javascript must be enabled.

9/21/2016
FEE MATCHING overview
The Graduate School may award matching tuition and fee support for grants and other external funds that support graduate students with a competitive stipend.

- Colleges must prioritize requests coming to the Graduate School. Pre-approval from the Graduate School is necessary.
- Graduate programs seeking a Graduate School Matching Tuition and Fee Award must submit the pre-approval request at least two weeks prior to the proposal deadline when seeking outside funding for graduate student support.
- Funding for specific students should be sought after the grant/external funding proposal has been approved by the funding source.

FEE MATCHING site
The fee matching request forms are accessed by clicking on the Fee Match tab of the Graduate School Nomination System at https://access.gradsch.ohio-state.edu/NominationSystem.

FEE MATCHING menu sections
There are three sections reflecting the three steps in the fee matching process.

The Pre-approval Requests section provides for the creation and submission of pre-approval forms informing the Graduate School of a potential grant, project, etc. The initiator can
- create a new request,
- edit saved (but not submitted) requests,
- view submitted requests, and
- cancel submitted (but not yet Graduate School approved) requests.

The Student-Specific Requests section provides for the creation and submission of fee matching requests for individual students after the pre-authorization form has been approved by the Graduate School and the Graduate School has been notified that the proposal has been funded. In addition to creating a new request, the initiator can
- edit saved (but not submitted) requests,
- view and/or copy form data from submitted requests,
- cancel submitted (but not yet Graduate School approved) requests, and
- renew an existing student-specific request or copy form data.

The Approvals section provides links to the various forms requiring review. This section is only viewable by authorized approvers. Please contact Theresa Hazelwood (.19) at 247-7293 if you have any questions.
Nomination System

Pre-Approval Requests
Create   Edit   View   Cancel

Student-Specific Fee Match Requests
Create   Edit   View   Cancel
Renew an Existing Student-Specific Request or Copy Form Data

Approvals
Approve Pre-Approval Requests   Approve Student-Specific Requests

SPD Approval of Student-Specific Requests
Create a Pre-approval Request

- Click on Create and fill in all fields as listed on the form (see below).
- Refer to Appendix 1 - Pre-approval fields help for detailed information about each field.
- Click Save Request for Later button to complete at a later time or click on Submit Request to start the approval process.

1. General information requirements

![Pre-Approval Request Form](image)
2. Projected financial requirements

   * Monthly Student Stipend Funded by this Grant/Award *
     
     0.00

   * Number of Students *

     0

   AU Semester (Press CTRL to select multiple years)

     2014 ▲
     2015   
     2016   
     2017 ▼

   SP Semester (Press CTRL to select multiple years)

     2014 ▲
     2015   
     2016   
     2017 ▼

   SU Term (Press CTRL to select multiple years)

     2014 ▲
     2015   
     2016   
     2017 ▼

   Total Matching Tuition and Fee Award Semesters (# of students X # of semesters)

     

   Is the grant/external funding proposal renewable? (Check Box for Yes)

     

   If so, for how long? (Number of years - numeric answer only)

     
3. Supporting documentation and approver – Refer to Appendix 1 – Pre-approval fields for required documentation and order of materials.

Supporting Documentation *

[Choose File] No file chosen

Authorized Approvers Name. # (press TAB after entering the Name. #) *

Approvers E-Mail Address

Describe covered expenses if the funding source provides an education and/or institutional allowance.

<table>
<thead>
<tr>
<th>Expense</th>
<th>Expense Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fees</td>
<td></td>
</tr>
</tbody>
</table>

* = Required Field.

Adding Comments

After submitting or saving your Fee Match Request, there is an opportunity to leave comments related to the request. These comments are viewable by all approvers and the Graduate School.

Edit a Pre-approval Request

- Click on the Edit link.
- You may Edit any saved request form prior to submission.
- If there’s an error on a submitted (but not approved) Pre-approval Request form, cancel the form and create a new one with the correct information.
- As with Pre-approval Request creation, there’s an option to Save Request for Later if desired.

Cancel a Pre-approval Request

- Click on the Cancel link.
- Any previously-created Pre-approval Request in your program that hasn’t already been Approved/Denied by the Graduate School can be cancelled.
- Click on the Cancel link next to the request you wish to remove.
- On the confirmation page, confirm this is the request you wish to cancel by checking the Cancel? checkbox and then clicking the Cancel button at the bottom of the page.
- A cancellation confirmation e-mail will be sent to the authorized approver as well as the Graduate School.
Approvers section: Approving a Pre-approval Request

- Designated approvers of a Pre-approval Request will be notified by email when a request has been submitted.
- Click on the Approve Pre-approval Request link.
- Locate the appropriate Request ID as indicated in the email notification.
- Click Approve/Deny link to view the request detail including any supporting documentation.
- Select Approve or Deny from the dropdown list of the appropriate approver and click Save.
- A comments section is available that is viewable by everyone.
Create a Student-specific Request

- The Student-Specific Fee Match Form is designed to be filled out once per academic calendar year. However, it can be done each semester if needed.

- Click on the Create and fill in fields as listed on the form (see below).

- You MUST enter the Request ID you received via e-mail upon successful submission of your original pre-approval request.

- Refer to Appendix 2 - Student-specific fields help for detailed information about each field.

- Click Save Request for Later button to complete at a later time or click on Submit Request to start the approval process.
Adding Comments

*After* submitting or saving your Fee Match Request, there is an opportunity to leave comments related to the request. *These comments are viewable by all approvers and the Graduate School.*
Edit a Student-specific Request

- Click on the Edit link.
- You may Edit any saved request form prior to submission.
- If there’s an error on a submitted (but not approved) Student-specific Request form, cancel the form and create a new one with the correct information.
- As with Student-specific Request creation, there’s an option to Save Request for Later if desired.

Renew/Copy a Student-specific Request

- Click on the Renew an Existing Student-Specific Request or Copy Form Data link.
- A list of prior year student-specific forms will be listed with Renew or Copy as options.
- Click on the Renew link next to the student to continue funding for the upcoming year.
- Click on the Copy link next to the student whose information will be used for a different student.

Cancel a Student-specific Request

- Click on the Cancel link.
- Any previously-created Student-specific Request in your program that hasn’t already been Approved/Denied by the Graduate School can be cancelled.
- Click on the Cancel link next to the request you wish to remove.
- On the confirmation page, confirm this is the request you wish to cancel by checking the Cancel? checkbox and then clicking the Cancel button at the bottom of the page.
- A cancellation confirmation e-mail will be sent to the authorized approver/SPO as well as the Graduate School.

Approvers section: Approving a Student-specific Request

- Designated approvers of a Student-specific Request will be notified by email when a request has been submitted.
- Click on the Approve Student-specific Request link.
- Locate the appropriate Request ID/Student name as indicated in the email notification.
- Click Approve/Deny link to view the request detail including any supporting documentation.
- Select Approve or Deny from the dropdown list of the appropriate approver and click Save.
- A comments section is available that is viewable by everyone.
<table>
<thead>
<tr>
<th>Field</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department Category</td>
<td>Selections include:</td>
</tr>
<tr>
<td></td>
<td>- College</td>
</tr>
<tr>
<td></td>
<td>- Center</td>
</tr>
<tr>
<td></td>
<td>- Institute</td>
</tr>
<tr>
<td></td>
<td>- Sponsor</td>
</tr>
<tr>
<td>Department Title</td>
<td>The title by of the Department making the request.</td>
</tr>
<tr>
<td>Academic Program</td>
<td>For multi-disciplinary projects, one program will need to be identified.</td>
</tr>
<tr>
<td>Contact First Name</td>
<td>List the person who will be the Graduate School’s most likely contact for any issues regarding the request.</td>
</tr>
<tr>
<td>Contact Last Name</td>
<td></td>
</tr>
<tr>
<td>Contact E-Mail</td>
<td>Emails should be in the format of name.#@osu.edu</td>
</tr>
<tr>
<td>Contact Phone</td>
<td>Phone numbers should include the area code and have no spaces or characters between the number segments.</td>
</tr>
<tr>
<td>Funding Agency</td>
<td>The agency that is providing the student’s stipend (e.g. National Science Foundation, National Institute of Health).</td>
</tr>
<tr>
<td>Project Title</td>
<td>Please list a condensed title that can easily identify the project.</td>
</tr>
<tr>
<td>Grant/Funding Proposal Submittal Deadline</td>
<td>A specific date must be selected.</td>
</tr>
<tr>
<td>Award Decision Date</td>
<td>A specific date must be selected even if it is an approximation.</td>
</tr>
<tr>
<td>Monthly Student Stipend Funded by this Grant/Award</td>
<td>Please list only the stipend amount funded by the award. Programs adding a supplement can include this information in the Comments section.</td>
</tr>
<tr>
<td>Number of Students</td>
<td>Number of students this grant/award will fund.</td>
</tr>
<tr>
<td>AU/SP Semesters/SU Term</td>
<td>Indicate the upcoming semesters for which the student will receive funding, even if it is an approximation.</td>
</tr>
<tr>
<td>Total Matching Tuition and Fee Award Semesters</td>
<td>Total number of support semesters being requested. It is the number of students multiplied by the number of semesters. If the number of students differs by semester, factor that into the total number of semesters requested.</td>
</tr>
<tr>
<td>Is the grant/external funding proposal renewable</td>
<td>If the grant/external funding is renewable, please indicate here.</td>
</tr>
<tr>
<td>If so, for how long</td>
<td>The number of years the grant can be renewed</td>
</tr>
<tr>
<td>Supporting Documentation</td>
<td>ONE uploaded PDF containing:</td>
</tr>
<tr>
<td></td>
<td>- The College’s (or other appropriate entity) Priority Statement from the Dean or appropriate administrator</td>
</tr>
<tr>
<td></td>
<td>- Proposed Budget</td>
</tr>
<tr>
<td></td>
<td>- Award Announcement, RFP, or grant Overview (limit of 10 pages)</td>
</tr>
<tr>
<td></td>
<td>For Pre-Approval requests for individual student awards (e.g. American Heart Association), also include the student’s Advising Report.</td>
</tr>
<tr>
<td>Authorized Approver’s Name.#</td>
<td>The OSU Name.# of the authorized approver for the primary program making the request. The authorized approver will then be listed as an approver of the request. This is in addition to the Graduate School’s approval.</td>
</tr>
<tr>
<td>Covered Expenses</td>
<td>Specify which of the listed Expenses are covered by the grant/award and in what amount(s). After selecting the appropriate expense</td>
</tr>
</tbody>
</table>
category from the dropdown menu, you can type in the amount of that expense covered by the grant/award. If none, leave blank.

### Approval sequence, actions and status changes

<table>
<thead>
<tr>
<th>Action</th>
<th>Status</th>
<th>Action</th>
<th>Status</th>
<th>Action</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Submitted by Program</td>
<td>Pending</td>
<td>2 Reviewed by Authorized Approver</td>
<td>Pending</td>
<td>3 Reviewed by Graduate School</td>
<td>Approved/Denied Cancelled/Complete/Not Funded</td>
</tr>
<tr>
<td>Confirmation email sent to initiator, notification email sent to authorized approver and form appears on approvers’ work lists.</td>
<td></td>
<td>After the authorized approver reviews and approves or denies, Graduate School is notified.</td>
<td></td>
<td>Notification email sent to initiator after Graduate School review and determination.</td>
<td></td>
</tr>
</tbody>
</table>
Worksheet - Optional worksheet that can be used as a guide prior to online submission, if desired.

Department Category *

College ☐ Center ☐ Institute ☐ Sponsor ☐

Department Title *

Academic Program *

--Select One--

Grad Studies Committee Chair

Contact First Name *

Contact Last Name *

Contact E-Mail *

Contact Phone *

Funding Agency *

Project Title

Grant/Funding Proposal Submittal Deadline *

Award Decision Date
Monthly Student Stipend Funded by this Grant/Award *

Number of Students *

AU Semester (Press CTRL to select multiple years)

SP Semester (Press CTRL to select multiple years)

SU Term (Press CTRL to select multiple years)

Total Matching Tuition and Fee Award Semesters (# of students X # of semesters)

Is the grant/external funding proposal renewable? (Check Box for Yes)

☐

If so, for how long? (Number of years - numeric answer only)

Authorized Approver’s Name.# (press TAB after entering the Name.#) *

Approver’s E-Mail Address

Describe covered expenses if the funding source provides an education and/or institutional allowance.

<table>
<thead>
<tr>
<th>Expense</th>
<th>Expense Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fees</td>
<td></td>
</tr>
<tr>
<td>Health Insurance</td>
<td></td>
</tr>
<tr>
<td>Graduate Student Research Costs</td>
<td></td>
</tr>
<tr>
<td>Graduate Student Travel</td>
<td></td>
</tr>
<tr>
<td>Tuition (Non-Resident)</td>
<td></td>
</tr>
<tr>
<td>Tuition (Resident)</td>
<td></td>
</tr>
<tr>
<td>Field</td>
<td>Notes</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Request ID</td>
<td>This is the unique identifier that the initiator was e-mailed when the Pre-Approval Request was submitted</td>
</tr>
<tr>
<td>Date of Graduate School’s Pre-Approval</td>
<td>Automatically populated from the Pre-Approval Request ID entered</td>
</tr>
<tr>
<td>Is this student’s stipend funded by an OSP project?</td>
<td>Select Yes or No</td>
</tr>
<tr>
<td>OSP (OSURF) Project # (IF OSP Project)</td>
<td>Provided by the principal investigator or found on PI Portal</td>
</tr>
<tr>
<td>OSP (OSURF) Approver E-Mail (IF OSP Project)</td>
<td>If Yes is selected in the OSP Project question, an OSP approver will automatically be attached to your Student-Specific Request</td>
</tr>
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<td>Contact First Name</td>
<td>List the person who will be the most likely Graduate School’s contact for any issues regarding the request.</td>
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<tr>
<td>Contact E-mail</td>
<td>Emails should be in the format of name.#@osu.edu</td>
</tr>
<tr>
<td>Student Stipend Funding Source</td>
<td>Entity that pays the student’s stipend (e.g. NIH)</td>
</tr>
<tr>
<td>Student Emplid</td>
<td>The OSU ID of the student that will be funded. From this, we’re able to pull in the student’s First Name, Last Name, Number of graduate credit hours earned and Student’s current GPA.</td>
</tr>
<tr>
<td>Student Appointment Type</td>
<td>Graduate Fellow, Trainee, GRA-GS Match or N/A – External Fellowship (External Fellows will not have an appointment in HR, except as a Graduate External Supplemental Fellow if the program wishes to provide a supplement. Requires Graduate School approval.)</td>
</tr>
<tr>
<td>Monthly Stipend Amount funded by the funding source</td>
<td>The monthly rate must be AT LEAST $1,500. If the monthly amount is less than $1,500, you must provide an explanation of where the remainder of the student’s stipend will be funded in the Minimum Amount Justification field.</td>
</tr>
<tr>
<td>Supporting Documentation</td>
<td>Recommended but optional, ONE uploaded PDF containing:</td>
</tr>
<tr>
<td>Requested Terms for Disbursement</td>
<td>The Student-Specific Request must be renewed annually. In this section, you will check the box for each of the semesters of the upcoming year during which the student will receive funding.</td>
</tr>
<tr>
<td>Authorized Approver’s Name.#</td>
<td>The OSU Name.# of the grad studies committee chair for the primary program making the request. The committee chair will then be listed as an approver on your request. This is in addition to the Graduate School’s approval.</td>
</tr>
</tbody>
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## Approval sequence, actions and status changes

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<td>3</td>
<td>Reviewed by Graduate School</td>
<td>Notification email sent to student after Graduate School review and determination.</td>
</tr>
</tbody>
</table>

Status of individual approvals can be reviewed by navigating to the View Student-specific Requests link under the Fee Match tab.
Worksheet - Optional worksheet that can be used as a guide prior to online submission, if desired.

Request ID (press TAB after entering the ID) *

Student Stipend Funding Source *

Contact First Name

Contact Phone

Student EmpID (press TAB after entering the ID) *

Monthly Stipend Amount *

Authorized Approver's Name.# (press TAB after entering the Name.#) *

Student Appointment Type

- Graduate Fellow
- Trainee
- GRA-GS Match
- N/A External Fellowship

Requested Terms for Disbursement

- SU term
- AU semester
- SP semester