Graduate Opportunity Programs Office

Advanced Opportunity Program Fellowship Recipient Handbook

2016-2017

Please retain this handbook throughout the duration of your fellowship
Important Phone Numbers

Advanced Opportunity Program Office
  Director               (414) 229-6618
  Office Manager  (414) 229-6538
  Fax                   (414) 229-2328

Benefits Office   Engelmann Hall 125  (414) 229-4925
Cashier’s Office  Mitchell Hall 295   (414) 229-4526
Financial Aid    Mellencamp Hall 162  (414) 229-4541
Payroll Office   Engelmann Hall 170   (414) 229-5804

Graduate School on the Web
uwm.edu/graduateschool/
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I. FELLOWSHIP STIPENDS AND OTHER BENEFITS

A. FELLOWSHIP STIPENDS

1. Academic Year (9 months) Fellowship Recipients

Fellowship payments for the academic year cover 9 months. If you have an academic year award, you will receive your stipend checks in nine equal installments from October 1 through June 1.

2. Fall only (4 ½ months) Fellowship Recipients

Fellowship payments for Fall Semester cover 4 ½ months. If you have a Fall Semester fellowship award, you will receive 5 fellowship stipend checks payable the first of every month from October 1 through February 1. You will receive 4 full-month checks October 1 through January 2. You will receive one ½ month check on February 1.

3. Spring only (4 ½ months) Fellowship Recipients

Fellowship payments for the Spring Semester cover 4 ½ months. If you have a Spring Semester award, you will receive 5 fellowship stipend checks payable the first of every month from February 1 through June 1. You will receive a ½ month check on February 1 and will receive 4 full month checks from March 1 through June 1.

4. Summer Fellowship Recipients (This applies to AOP Renewal Fellows only)

Please Note: Summer support is not guaranteed; it is contingent upon the availability of funds. Fellows who are either dissertators or need the Summer semester to complete their master’s degree or take their preliminary exams will be granted priority.

If you have been awarded a Summer Session fellowship, you will receive tuition-only support that goes into effect on July 1 (unless you are otherwise notified by the AOP Fellowship Office).

Summer Request Forms can be found at the following URL: 
http://uwm.edu/graduateschool/wp-content/themes/uwmwebid-graduateschool/media/aop_summer_support.pdf

5. WINTERIM

The AOP Fellowship does not cover Winterim courses. Exceptions will be granted to special circumstances with the approval of the department and AOP director.

B. TUITION BENEFIT

Nonresident Tuition
If you are not a resident of the State of Wisconsin, you will qualify for a Nonresident Tuition Remission (NRTR), which covers all nonresident tuition. The AOP Fellowship Office will submit a NRTR tuition remission form to the Bursar's Office on your behalf.

Resident Tuition
If you are a resident of Wisconsin, you will qualify for an in-state tuition remission for full-time study in your graduate program. Please note that the AOP Office does not pay for Non-Degree Courses or Sport & Recreation courses. All courses taken must be relevant to your degree program.

Full-time means that AOP recipients must carry and complete a full load of 8-12 graduate credits each
Also, AOP Doctoral Candidates with dissertation status must carry 3 credits per semester. Doctoral students who are preparing for preliminary examination are allowed to take one credit for one semester. Master’s students who are preparing their thesis can register for fewer than 8 credits during the semester they complete their degree. An exception request form must be submitted for credit reduction and signed by the Director of Graduate Education. Your graduate in-state tuition will be billed directly to the Graduate School. The AOP Fellowship Office will pay this bill on your behalf.

C. FEES

All Fellows are responsible for the payment of mandatory fees. (See schedule on page 6)

In addition, fellows are responsible for any special "course" fees that may occur (i.e., online and other distance education courses; lab fees). The University will bill you directly for these fees.

Arrangements through the Accounts Receivable Office can be made to have deductions made from segregated fees.

D. HEALTH BENEFITS

All Fellowship recipients are eligible for a benefit package, which includes comprehensive State Health Insurance.

Application for membership and participation in any State of Wisconsin health insurance program or other fringe benefit must be submitted within 30 calendar days of the first contractual date of your initial UWM fellowship appointment, which is August 24, 2015. For more information contact Gail Dukes (dukes@uwm.edu) in the UWM Benefits Office, located in Engelmann Hall 125, (414) 229-4925.

II. SALARY ADVANCE

A. UW System provides for a ONE TIME salary advance in September.

B. To qualify for a salary advance, you must be a “new employee,” that is, not previously on the UWM payroll.

C. Salary advance forms will be available as of August 1st in the Graduate Diversity and Opportunities Program Office located in Mitchell Hall 255.

III. LIBRARY PRIVILEGES

A. All Fellowship recipients may check materials out of the UWM Libraries for an entire semester, with some exceptions.

B. For more information on library privileges and resources, visit their web site at:

http://uwm.edu/libraries/

IV. FELLOWSHIP REGULATIONS

Graduate Faculty Council regulations state that fellowship recipients must comply with the following requirements.
A. Your Graduate School award is contingent upon completion of all departmental and Graduate School requirements for demonstrating academic and/or research progress. Consult your departmental regulations and the Graduate School Student/Faculty Handbook.

B. Fellows who do not receive award for consecutive semesters must re-apply.

C. Fellowship Deferment is granted ONLY for reasons of illness.

V. AOP REQUIREMENTS

1) Credit Load:  
AOP recipients must carry and complete a full load of 8-12 graduate credits each semester. Please note that AOP will NOT pay for Sport & Recreation Course. AOP Doctoral Candidates with dissertation status must carry 3 credits per semester. Doctoral students who are preparing for their preliminary examination are allowed to take one credit for one semester.

2) Concurrent Scholarship/Fellowship:  
No other fellowship or scholarship may be held concurrently with a Graduate School award, with the exception of the UWM Chancellor's Graduate Student Award and other awards that do not exceed $6,750.

3) Concurrent Employment:  
Concurrent employment of Fellowship recipients is limited to the following:

   - University TA, PA, or RA of a maximum of 25%  
   - Student hourly or outside employment of up to 10 hours per week

4) PERIODIC REPORTING:  
You are required to periodically report satisfactory progress as verified by your graduate advisor, when requested.

These conditions must be met throughout the duration of the award. Failure to do so may result in the cancellation of your fellowship stipend and other benefits.

VI. REQUESTS FOR EXCEPTIONS

A. It is important that you comply with all fellowship regulations as stated above. The Graduate Diversity and Opportunities Program Office will monitor your progress regularly to see that you are doing so.

B. If, for serious extenuating circumstances, you must deviate from the official regulations (example: register for more than 12 or fewer than 8 graduate credits), you must request an exception to the rule and obtain formal approval prior to taking any action. If any exception requests are to be made, contact the Assistant Director for Graduate Diversity and Opportunity Programs immediately.

C. To request a Graduate Fellowship Request for Exception Form, please go to this Web address:

   http://uwm.edu/graduateschool/types-of-funding/#fellowship_exception

FAILURE TO OBTAIN FORMAL APPROVAL FROM THE AOP FELLOWSHIP OFFICE MAY RESULT IN THE CANCELLATION OF YOUR FELLOWSHIP STIPEND AND OTHER BENEFITS.
VII. TAX INFORMATION

While the University does not withhold taxes for American citizens, resident aliens, or nonresident aliens whose countries have tax treaties which exempt scholarship or fellowship income, portions of your fellowship award may be taxable. The tax code allows only amounts received as “qualified scholarships” to be excluded from gross income. “Qualified scholarships” refers to portions of your fellowship used for qualified tuition, fees, books, supplies, and equipment. For more information, contact the Office of Legal Affairs at 414-229-4278, or you may want to request Publication 508 (Miscellaneous Expenses) or Publication 970 (Tax Benefits for Education) from the Internal Revenue Service: (website) www.irs.ustreas.gov or (phone) 800-829-3676.

At the end of the year, you will receive an information earnings statement from the University. Consequently, it is important for tax purposes that you retain a copy of your fellowship letter of offer as well as receipts of fees/tuition, books, supplies, and equipment.

The University is not in a position to provide tax-consulting services and does not warrant that its interpretations are correct. You should consider consulting an attorney or tax preparation expert or firm for advice as to how your own particular situation is affected.

VIII. STUDENT ADDRESSES

A. Campus Address

Important university information may be sent to you via campus mail, in care of your academic program. Please inform your graduate program of this and make arrangements with them to receive and hold this mail for you.

B. Local Mailing Address

It is important that you keep the Graduate Diversity and Opportunities Program Office informed of any changes to your current local mailing address at all times during your fellowship year.

C. Email Address

During your fellowship year, fellowship reminders and other important information will be transmitted to you via email. Make sure that you inform the Graduate Diversity and Opportunities Program Office of any changes to your current email address account. It is your responsibility to check your email account often!

IX. OTHER FINANCIAL ASSISTANCE/FINANCIAL AID

A fellowship award may have an impact on other types of financial aid. If you have applied for or are receiving a federal loan or work-study employment through UWM, please notify Coleen Dunlap (cdunlap@uwm.edu) in the Department of Financial Aid Office at (414) 229-5619 (or call the general office at (414)229-4541) and inform them of your fellowship award.

To view mandatory/segregated fees for Spring 2015, go to following URL:
http://www4.uwm.edu/bfs/depts/bursar/spring15seg.cfm
Acceptance of an offer of financial support* (such as a graduate scholarship, fellowship, traineeship, or assistantship) for the next academic year by a prospective or enrolled graduate student completes an agreement that both student and graduate school expect to honor. In that context, the conditions affecting such offers and their acceptance must be defined carefully and understood by all parties.

Students are under no obligation to respond to offers of financial support prior to April 15; earlier deadlines for acceptance of such offers violate the intent of this Resolution. In those instances in which a student accepts an offer before April 15, and subsequently desires to withdraw that acceptance, the student may submit in writing a resignation of the appointment at any time through April 15. However, an acceptance given or left in force after April 15 commits the student not to accept another offer without first obtaining a written release from the institution to which a commitment has been made. Similarly, an offer by an institution after April 15 is conditional on presentation by the student of the written release from any previously accepted offer. It is further agreed by the institutions and organizations subscribing to the above Resolution that a copy of this Resolution or a link to the URL should accompany every scholarship, fellowship, traineeship, and assistantship offer.

The following list includes CGS member institutions that indicated their support of the Resolution.

This Resolution was renewed October 2014.

| Acceptance of an offer of financial support* (such as a graduate scholarship, fellowship, traineeship, or assistantship) for the next academic year by a prospective or enrolled graduate student completes an agreement that both student and graduate school expect to honor. In that context, the conditions affecting such offers and their acceptance must be defined carefully and understood by all parties. | Students are under no obligation to respond to offers of financial support prior to April 15; earlier deadlines for acceptance of such offers violate the intent of this Resolution. In those instances in which a student accepts an offer before April 15, and subsequently desires to withdraw that acceptance, the student may submit in writing a resignation of the appointment at any time through April 15. However, an acceptance given or left in force after April 15 commits the student not to accept another offer without first obtaining a written release from the institution to which a commitment has been made. Similarly, an offer by an institution after April 15 is conditional on presentation by the student of the written release from any previously accepted offer. It is further agreed by the institutions and organizations subscribing to the above Resolution that a copy of this Resolution or a link to the URL should accompany every scholarship, fellowship, traineeship, and assistantship offer. | The following list includes CGS member institutions that indicated their support of the Resolution. | This Resolution was renewed October 2014. |
CGS - Resolution Regarding Graduate Scholars, Fellows, Trainees and Assistants (continued)

Ohio State University
Ohio State University
Old Dominion University
Oregon State University
Park University
Pennsylvania State University
Pepperdine University
Pittsburg State University
Polytechnic University of NYU
Portland State University
Princeton University
Purdue University
Queens College of the City
University of New York
Radford University
Rensselaer Polytechnic Institute
Rice University
Rockefeller University
Rowan University
Rutgers - New Brunswick
Rutgers - Newark
St. Bonaventure University
St. Cloud State University
St. John's University
Saint Louis University
San Diego State University
San Francisco State University
San Jose State University
Santa Clara University
Shippensburg University
South Carolina State University
South Dakota School of Mines & Technology
South Dakota State University
Southeast Missouri State University
Southern Illinois University
at Carbondale
Southern Illinois University
at Edwardsville
Southern Methodist University
Southern University &A&M College
Spalding University
Stanford University
State University of New York
at Binghamton
State University of New York – Upstate Medical University
Stony Brook University
SUNY College of Environmental Science and Forestry
Syracuse University
Temple University
Tennessee State University
Tennessee Technological University
Texas A & M International University
Texas A & M University
Texas A & M University - Corpus Christi
Texas Christian University
Texas Southern University
Texas State University
Texas Tech University
Texas Woman's University
Towson University
Truman State University
Tufts University
Tulane University
University at Buffalo, SUNY
University of Akron
University of Alabama
University of Alabama at Birmingham
University of Alabama in Huntsville
University of Alaska, Fairbanks
University of Albany, State University of New York
University of Arizona
University of Arkansas
University of Bridgeport
University of California, Berkeley
University of California, Davis
University of California, Irvine
University of California, Los Angeles
University of California, Riverside
University of California, San Diego
University of California, San Francisco
University of California, Santa Barbara
University of California, Santa Cruz
University of Central Arkansas
University of Central Florida
University of Chicago
University of Cincinnati
University of Colorado at Boulder
University of Colorado at Denver
University of Connecticut
University of Dayton
University of Delaware
University of Denver
University of the District of Columbia
University of Florida
University of Georgia
University of Hartford
University of Hawaii at Manoa
University of Houston
University of Idaho
University of Illinois at Chicago
University of Illinois at Springfield
University of Illinois at Urbana-Champaign
University of Iowa
University of Kansas
University of Kentucky
University of Louisiana at Lafayette
University of Louisville
University of Maine
University of Maryland, Baltimore County
University of Maryland, College Park
University of Maryland, Eastern Shore
University of Massachusetts Amherst
University of Massachusetts Boston
The University of Memphis
University of Miami
University of Michigan
University of Minnesota
University of Mississippi
University of Missouri, Columbia
University of Missouri, Kansas City
University of Missouri, St. Louis
University of Montana
University of Nebraska at Kearney
University of Nebraska at Omaha
University of Nevada-Las Vegas
University of Nevada-Reno
University of New Hampshire
University of New Haven
University of New Mexico
University of New Orleans
University of North Carolina at Chapel Hill
University of North Carolina at Charlotte
University of North Carolina at Greensboro
University of North Dakota
University of North Florida
University of North Texas
University of North Texas Health Science Center - Graduate School of Biomedical Sciences
University of Northern Colorado
University of Northern Iowa
University of Notre Dame
University of Oklahoma
University of Oklahoma Health Sciences Center
University of Oregon
University of Pennsylvania
University of Pittsburgh
University of Puerto Rico - Rio Piedras Campus
University of Rhode Island
University of Rochester
University of San Diego
University of Scranton
University of South Alabama
University of South Carolina
University of South Florida
University of Southern California
University of Southern Mississippi
University of Tennessee at Chattanooga
University of Tennessee Health Science Center
University of Tennessee, Knoxville
University of Texas at Arlington
University of Texas at Austin
University of Texas at Brownsville
University of Texas at Dallas
University of Texas at San Antonio
University of Texas Graduate School of Biomedical Science at Galveston
University of Texas Grad School of Biomedical Science at Houston
University of Texas Grad School of Biomedical Science at San Antonio
University of the Pacific
University of Toledo
University of Tulsa
University of Utah
University of Vermont
University of Virginia
University of Washington
University of West Florida
University of Wisconsin – Eau Claire
University of Wisconsin – La Crosse
University of Wisconsin – Madison
University of Wisconsin – Milwaukee
University of Wyoming
Utah State University
Valdosta State University
Vanderbilt University
Villanova University
Virginia Commonwealth University
Virginia Polytechnic Institute and State University
Wake Forest University
Walden University
Washington State University
Washington University in St. Louis
Wayne State College
Wayne State University
Wesleyan University
West Chester University
West Virginia University
West Virginia Wesleyan College
Western Carolina University
Western Illinois University
Western Kentucky University
Western Michigan University
Western Washington University
Wichita State University
Woods Hole Oceanographic Institution
Worcester Polytechnic Institute
Wright State University
Xavier University of Louisiana
Yale University
Youngstown State University

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