«First\_Name» «Last\_Name»

Campus ID: «Campus\_ID»

Date: December 5, 2022

Dear «First\_Name»,

I am extremely pleased to confirm your appointment as a Graduate School Fellow at the University of Wisconsin-Madison for the «Duration\_written» («Duration\_numeric») months of «Start\_Date» to «End\_Date». Support for this fellowship is provided by the Graduate School, part of the Office of the Vice Chancellor for Research and Graduate Education at the University of Wisconsin-Madison, with funding from the Wisconsin Alumni Research Foundation and UW-Madison. We look forward to your participation in our community of scholars and commend you on your accomplishments.

The addendum to this letter, “Important Information for Fellows," provides detailed information about your fellowship; please read it carefully as it outlines important benefits and obligations of your fellowship.

Congratulations and best wishes for your graduate studies!

Sincerely,

Office of Diversity, Inclusion, and Funding

University of Wisconsin-Madison Graduate School
offr@grad.wisc.edu

**Important Information about your Fellowship**

Stipend

Fellowship period: «Start\_Date» - «End\_Date»

Total stipend amount: «Total\_Amount» paid in biweekly installments

First stipend check: «First\_Check\_Date»

You must [set up direct deposit to a bank or credit union](https://hr.wisc.edu/pay/direct-deposit/) using the Payroll information portal on MyUW or by contacting your program’s Payroll & Benefits Coordinator.

***[ NOTE TO DEPARTMENT: Please add language from either #1, 2, or 3 below, depending on your situation. Use the*** [***Fellowship calculator***](https://hr.wisc.edu/docs/pay/fellow-trainee-adjustment-calculator.xlsx) ***to determine if an adjustment is needed. ]***

|  |  |  |
| --- | --- | --- |
| **Pay basis** | **Duration** | **Language to use** |
| Academic / C-Basis | Fall only | Option 1 |
|   | Spring only | Option 3 |
|   | Academic Year | Option 2 |
|   |   |   |
| Annual / A - Basis | All types | Refer to [Fellowship calculator](https://hr.wisc.edu/docs/pay/fellow-trainee-adjustment-calculator.xlsx) to determine if an adjustment is needed |

1. **Stipend ABOVE annual stipend rate (will require adjustment each pay period, after first pay period)**

*UW-Madison is on a biweekly pay schedule. Because your appointment start and end dates do not align exactly with the biweekly pay schedule, your biweekly stipend payments will result in an overpayment that needs to be adjusted. This is necessary to pay the stipend amount required by the sponsor (SPONSOR NAME), which is $AMOUNT. You will see a negative adjustment of -$AMOUNT on each biweekly earnings statement, which will ensure that your total stipend at the end of your appointment will equal $AMOUNT. The total stipend amount is subject to change in the event of an early termination.*

*If you intend to terminate your appointment before the end date, there could be negative impacts to your stipend and health insurance. To avoid this, please contact your department administrator as soon as your end date has been determined. Advance notice must be provided at least two weeks in advance of the early termination date.*

*Please sign below to indicate your understanding of stipend payments.*

**2. Stipend matches annual stipend rate (no adjustment needed)**

*UW-Madison is on a biweekly pay schedule. The total stipend that you will receive, as required by the sponsor and over the course of your appointment, is $AMOUNT. The total stipend amount is subject to change in the event of an early termination.*

*If you intend to terminate your appointment before the end date, there could be negative impacts to your stipend and health insurance. To avoid this, please contact your department administrator as soon as your end date has been determined. Advance notice must be provided at least two weeks in advance of the early termination date.*

*Please sign below to indicate your understanding of stipend payments.*

*Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

**3. Stipend is below annual stipend rate (will require a lump sum payment at end of appointment)**

*UW-Madison is on a biweekly pay schedule. The total stipend that you will receive, as required by the sponsor and over the course of your appointment, is $AMOUNT. Because your appointment start and end dates do not align exactly with the biweekly pay schedule, you will receive a lump sum payment of $AMOUNT at the end of your appointment period. This is necessary to pay the stipend amount required by the sponsor, which is $AMOUNT. The total stipend amount is subject to change in the event of an early termination.*

*If you intend to terminate your appointment before the end date, there could be negative impacts to your stipend and health insurance. To avoid this, please contact your department administrator as soon as your end date has been determined. Advance notice must be provided at least two weeks in advance of the early termination date.*

*Please sign below to indicate your understanding of stipend payments.*

*Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

***Nonservice Appointment***

This is a non-service fellowship award. Payments are to support your studies or research. You are not required to perform any services in exchange for the award.

Tuition and Segregated Fees

Your fellowship covers the full cost of tuition, which includes the resident and non-resident (as applicable) portion of the tuition and segregated fees during the fellowship period stated above. **Please note that the fellowship does not cover additional fees, including office document fees, international student fees, and/or course fees.** If you wish to take credits during the summer following your fellowship, you will be responsible for paying the instate tuition rate for those credits. If you are enrolled in an academic program that does not accept or allow tuition remission, you will not receive the tuition remission benefit.

Insurance Benefits

All benefits and payroll paperwork should be completed through the e-Benefits portal on MyUW or with your program’s Payroll & Benefits Coordinator. Fellows are eligible for most of the same benefits as RAs, TAs, and PAs. **Fellows are not, however, eligible for any tax sheltered savings accounts (e.g. FSA, HSA, and 403b) as fellowship stipends do not have US income tax withheld.** To learn about benefits you are eligible for, please visit <https://hr.wisc.edu/benefits/new-employee-benefits-enrollment/benefits-for-employees-not-covered-by-the-wrs/> or contact your program’s Payroll & Benefits Coordinator. **Benefit applications must be completed within 30 days of the start of your appointment to secure benefits.** To start your benefits as soon as possible, the forms must be submitted prior to the start of your fellowship.

Full-Time Study

You must register full-time during all terms in which you have a fellowship appointment. Full-time study for non-dissertators is a minimum of eight (8) credits of graduate level coursework each fall and spring semester. Full-time study for dissertators is exactly three (3) credits each fall and spring semester. If you have a summer fellowship appointment, non-dissertators must register for two (2) credits and dissertators must register for three (3) credits; to be taken during the 8-week general summer session (DHH). Graduate-level credits are courses numbered 300 and above that are not taken as audit or pass/fail. Research and thesis credits that are graded as satisfactory/unsatisfactory are fine.**Failure to register will result in the withholding of your stipend.**

Satisfactory Progress

Fellows must make satisfactory progress toward their graduate degrees. Satisfactory progress is at the discretion of a student’s program, the Graduate School, and a student’s faculty advisor. At a minimum, the Graduate School requires that students maintain a graduate GPA of at least 3.0 in all graduate-level work taken as a graduate student. Future funding is dependent on satisfactory progress toward your degree.

Concurrent Appointments

In general, along with your fellowship, you may hold concurrent graduate assistantships and/or student hourly appointments up to a total maximum combined annual stipend equivalent to the 100% RA appointment level for your academic program (see <https://grad.wisc.edu/funding/graduate-assistantships/> for the current rates by program). For more information on concurrent appointments, please visit <https://grad.wisc.edu/documents/concurrent-appointments.> **Please contact the Fellowship Officer at** **offr@grad.wisc.edu** **before accepting a concurrent appointment.**

Taxes

Fellowship stipends are not considered wages, although they may be taxable income. As such **the University does not withhold taxes from the stipend**. As a result, you may have to pay estimated taxes on a quarterly basis directly to the Internal Revenue Service and the state Department of Revenue in order to avoid penalties for late payment of taxes. Address questions regarding quarterly estimates to the Internal Revenue Service or the Wisconsin Department of Revenue. **University faculty and staff are not authorized to provide tax advice**. However, the University of Wisconsin Service Center has put together a [useful website with general information about tax filing](http://uwservice.wisc.edu/tax/filing-resources.php). To help you prepare annual income tax forms, Employee Compensation and Benefits (EC&B), 21 N. Park Street, Suite 5101, will send each appointee an information letter reporting the amount of stipend paid the previous tax year. You will receive a Fellowship Letter in January. You will not receive a W-2 form, since W-2 forms are for wages only. Address questions regarding this letter or other withholding issues to EC&B at (608) 265-2257.

Financial Aid

This award may affect your eligibility for need-based financial aid. You must inform the [Office of Student Financial Aid](https://financialaid.wisc.edu/contact/) (608-262-3060) and any granting agency of all types of support you receive, including fellowships, to ensure appropriate calculation of financial need.

***COVID-19 Information***

UW-Madison employees are required to comply with all UW Madison COVID-19 related policies. For the most updated guidance, please see <https://hr.wisc.edu/docs/recruitment/new-employee-communication-covid-guidelines.pdf>.

Information for 2-Year Graduate School Fellowships Only

If you have a 2-year Graduate School Fellowship, you must be a non-dissertator during the first year of your fellowship and a dissertator during your second year of your fellowship. You are required to maintain dissertator status during the second year of your fellowship. You will be eligible to receive the second year of your Two-Year University Fellowship in any academic year after you have attained dissertator status. MFA students are eligible to receive the second year of the University Fellowship in the final year of their studies. The stipend rate for the second year is determined each Fall for the following academic year and is generally the same as or somewhat higher than the stipend level of the initial year. **Your funding support may change during the years which are not covered by this fellowship.**Please check with your program to get the details of future funding opportunities. For each future appointment, you should ask for the following information: type of position (e.g., research assistantship, teaching assistantship); start and end dates; percentage of the appointment/number of work hours required (e.g., 50% appointment = 20 hours); stipend amount; tuition coverage; payment of segregated fees, if applicable, (segregated fees are roughly $640/semester and $315/summer term); eligibility for health insurance; and additional benefits, if any (e.g., travel funds, professional development funds, priority for graduate student housing, et cetera).

Housing Priority for Incoming Fellows

If you are an incoming student and are interested in obtaining housing through the university, please visit <https://www.housing.wisc.edu/apartments>. Pending availability, incoming Graduate School Fellows are given priority in housing assignment at Eagle Heights and Harvey Street apartments. To apply, fill out the online application, and indicate in the University Status section that you have a “Graduate School Fellowship.”

Sponsorship

Sponsorship of this award should be acknowledged in any reports/publications that may arise from this funding using the following language, “*Support for this fellowship is provided by the Graduate School, part of the Office of Vice Chancellor for Research and Graduate Education at the University of Wisconsin-Madison, with funding from the Wisconsin Alumni Research Foundation and the UW-Madison*.”