

INSTRUCTIONS FOR COMPLETING THE STUDENT AID INFORMATION FORM (SAIF)

The SAIF form is used for financial aid including stipends and supplements to TGS fellowships or graduate assistantships, as well as tuition (if student is not eligible for RAS) and health insurance, if these are paid from your chart string(s). Stipend data should match what you are paying the student in HRIS. This is especially important in determining financial need for students who apply for loans.

Only information pertaining to **2008/2009** should be entered on this form. **If your award crosses over fiscal years, use the appropriate year-specific forms.**

The SAIF is used for students at the 503 tuition rate, for sponsored projects that do not carry the full indirect rate (F&A), and for non-sponsored chart strings. For sponsored projects that carry the full indirect rate (F&A), use the Research Assistant Scholarship & Appointment (RAS) form.

Note: Spaces for Source of Aid, Stipend, and Tuition appear twice; use the duplicate spaces only if the student is being paid from multiple sources.

ACTION

◦ For all actions other than initial appointments or addition of new quarters (i.e., cancellation, decrease, increase, change in source), please use **Student Aid Information Revision/Cancellation Form**.

STUDENT INFORMATION

- STUDENT ID# is the number assigned through SES; HRIS ID# is assigned in HRIS. (Numbers may differ.)
- Check NEW if the student has entered The Graduate School during 2008/2009; otherwise check CONTINUING.
- Provide student's *home* department; if you are not certain what the home department is, leave blank.

SOURCE(S) OF AID

- **Be specific as to source & type of funding** (such as NSF or NIH training grant; NSF research grant; departmental endowment or gift, etc.)
- Enter the source(s) of aid.
- If applicable, the Principal Investigator (PI) listed on the form must match the PI on the Award Activity and F&A information.

STIPEND

- Indicate dates within the academic year when award begins and ends. The academic year runs from September 1, 2008 through August 31, 2009.
- Enter the dollar amount of the monthly stipend, the number of months of payment, and the total award amount.
- Provide the NU Financials chart string number from which the stipend will be paid, along with the **expense account**. The account informs us whether the funding is a stipend from a fellowship or training source (78050) or a graduate assistantship (60076).
- **Stipend data are for informational purposes only. You must submit separate paperwork to the Payroll office for the student to be paid.**

TUITION / HEALTH FEES / STUDENT ACTIVITY FEE

Tuition

- Indicate tuition amounts for appropriate quarters, along with the total amount. The departmental/sponsored project portion of tuition for students registered for 503 is \$1,157.
- Provide the appropriate NU Financials chart string number. The expense account for tuition is 78020.

Health Fees

- You may also use this space to indicate payment of health fees. If health fees are being paid from the same chart string as tuition, add the health fees to the fall tuition rate, and enter the total for fall. The expense account for health fees is 78020, unless it is being paid by a training grant renewed or new as of Fall 2006. **For these training grants, the expense account for health fees is 60184.**

Student Activity Fee

- Student activity fees cannot be charged to R01 chart strings. You must use a departmental or non-sponsored or an NIH T32 or individual NRSA chart string to pay this fee. The expense account is 78020.

AUTHORIZATION

- Print name of person preparing form, including telephone number and email address, so that we may contact you for clarification, if necessary.
- Have the chair; director or other appropriate representative sign the form.
- **For sponsored chart strings, a representative from ASRSP must sign the form.** ASRSP will then forward the form to The Graduate School. Do not send duplicates to both offices.
- If you do not need ASRSP approval, send the completed form directly to Mike Fernandez in The Graduate School.

VERIFICATION

- If the NU Financials chart string does not have corresponding item types for stipend and tuition, please be advised that data entry of the award will be delayed until new item type(s) have been set up; this is especially true in the fall quarter.
- Check NU Customer Account to verify that the correct amounts and chart string(s) have been charged.

Instructions for Student Aid Information Form (SAIF): Revision/Cancellation

Follow the instructions for the regular SAIF, *except*:

- Check all relevant Actions.
- Fill in the date of the previously submitted SAIF, if known.
- For the “source of aid,” “stipend,” and “tuition/health fees/student activity fee” sections, fill in the previously submitted information first. Then fill in the corrected chart string, dates, or amounts in the lower portions. (This is necessary both for accounting & auditing purposes.)
- If more than one tuition or stipend chart string is being revised, you will need to use more than one form.

For revisions on sponsored chart strings, please keep in mind:

- If a student has already been paid out of one sponsored chart string, and effort has already been certified, it is **not** possible to retroactively revise the RAS/SAIF in order to switch the student to another chart string.
- “Parking” of a student on one grant until another grant becomes funded is strictly prohibited.
- *Please be advised that revising payroll on sponsored chart strings is an audit flag.*
- Revisions that go back over 90 days require a 90-day exception letter addressed to ASRSP.

Any student paid on expense account 60076 is required to report effort.
The PI listed for the chart string must certify effort for all RA's on the grant.

The sponsored chart string must be open for the term of the SAIF request.
Expense Account 78020 (tuition) must be open for the SAIF Research Assistant tuition to be approved.
Expense Account 78050 must be open for an NRSA/training grant/T32 to be approved.
Expense Account 60184 must be open for a training grant to pay health fees.

If you have any questions, please contact Mike Fernandez in The Graduate School at 847/491-7334 or m-fernandez@northwestern.edu.