DEPARTMENT
GUIDE
TO
CENTRAL SERVICES
ACCOUNTING TRANSACTIONS

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ASSISTANT BURSAR
BURSAR’S OFFICE
UPDATED OCTOBER 2006
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GENERATION OF FINANCIAL TRANSACTIONS
THROUGH CENTRAL SERVICES ACCOUNTING – CSA
(HOW DO MY TRANSACTIONS POST TO IRIS LEDGERS)
SECTION 1
GENERATION OF STUDENT CHARGES/PAYMENTS

When a student registers, charges are created in the student’s VolXpress account for In-state Maintenance fee, Technology fee, Programs and Services fee, Facility fee and Transportation fee. If the student is classified as an out-of-state student, a charge is also calculated for Out-of-State Tuition. The charges are based on the number of hours for which the student registers. Some courses carry special course fees. Examples are Golf, Bowling, Art, Chemistry, Biology, Music and Engineering courses. The charge for these fees is generated when the student registers for one of these courses. Room and Board charges are added to the student’s account prior to mailing the first VolXpress statement for the term provided the student has a signed contract. Room and Board charges are based on the student’s contract with Residence Halls and Aramark Food Services. A student can begin the registration process months before the term actually begins. The Bursar’s Office begins mailing VolXpress statements approximately one month before payment is due for the term. Payment is due approximately one week to ten days before the first day of class. This allows the Bursar’s Office to process all payments before cancellation of schedules from Priority Registration. Schedules are cancelled due to non-payment of fees, lack of Confirmation of Attendance, payment of less than 50% of fees due, etc. After Priority schedules are cancelled, the registration system is opened for Final Registration. Students who register during this period who were registered in the previous term or in Priority Registration will be assessed a Final Registration fee of $20 to $100.

Student’s fees can be paid from various sources. A student may receive financial aid awarded through the Financial Aid Office in the form of grants, scholarships, fellowships and loans. This aid will show as pending aid on the student’s VolXpress statement until financial aid is released to students approximately one week into the term. A student may also pay by cash, check or credit card. Credit card payments are only accepted on the web at CPO.UTK.EDU. A student may be sponsored by an outside agency such as Tennessee Vocational Rehabilitation or by an on-campus sponsor such as the Athletic Department. These students are authorized on CSA as NPE’s (Non-Person Entity). These authorizations show on the student’s VolXpress statement as a Pending Third Party until payment is made by the sponsoring agency in the form of check, wire or inter-departmental transfer voucher (ZE document). A graduate student can also be on a departmental assistantship. There are four types of assistantships: graduate assistant, graduate teaching assistant, graduate teaching associate and graduate research assistant. Effective with Fall Semester, 2004, the process for charging graduate fee waivers changed. Many are now charged back to the student’s department. A student must have at least one 25% FTE position to be eligible for a fee waiver. Students are no longer allowed to add 2 positions together to total 25% FTE. Out-of-state tuition for graduate waiver positions is charged to the Central Waiver Account. In-state tuition is charged to the student’s distribution Cost Centers or WBS Element listed on PA20 in IRIS or the Central Pool account depending on waiver rules defined in the
Graduate Waiver section. The department may specify which distribution account to charge by entering the information in the Department Waiver Screen in CSA.

**DISTRIBUTION OF INCOME**

All charges associated with student accounts are identified in the CSA Item Account Table maintained by The Bursar’s Office. This table lists each charge (such as in-state maintenance) and the associated income/expense Funds, Cost Centers or WBS elements. It also includes other information necessary for the creation of financial transactions through CSA.

The income is accumulated in a suspense account for each term. Income generation begins when student charges are added to CSA for the term. However, that income is not distributed until after the undergraduate add deadline each term. For example, if the UG add deadline for Fall Semester is August 30, income and expenses for Fall Semester will be distributed at the end of August. Beginning at midnight on the last day of the month, the monthly transfer voucher process begins.

Income for Fall is normally distributed in August, Spring in January, Mini-term in May and Summer on June 30. There is a Suspense Account for each semester. From the beginning of registration until the release date, the monthly TV process puts the income into a suspense
account for the associated term. After the release date, the monthly TV process distributes any income generated since the last monthly run directly to the income accounts.

**EXPENSE TRANSACTIONS**

Expense transactions processed by CSA are generated by payments to student accounts. They include financial aid awards, fee waiver payments and departmental NPE charges. Financial aid awards are posted to a student’s account as a payment approximately one week into the term. After that date, transactions are posted to the student’s account daily as new or additional awards are made by the Financial Aid Office. Assistantships are posted to the student’s account in one of two ways: either from IRIS or from the CSA Departmental Waiver Screen. If a student is on IRIS with at least one 25% FTE position as a GA, GTA, TA or GRA, a waiver payment will be posted to the student’s account when the student incurs a charge for in-state maintenance and/or out-of-state tuition. If the student **HAS NOT** yet been added to IRIS payroll, he/she must be entered on the Department Waiver Screen in CSA in order for a waiver payment to post to his/her account. Departmental NPE payments are posted to a student’s account approximately one month into the term. The Bursar’s Office has to request a special job run to generate the NPE payments. This job is run several times during the term to post any new or additional NPE’s authorized since the last job run. Just as income is accumulated in suspense Funds, expenses are also accumulated in suspense Funds. The expenses are posted to the departmental Funds, Cost Centers or WBS Elements on the same day income is released to the departments. After the initial release date, expenses are posted on a monthly basis. Approximately 40 days into the term, payroll based fee waivers are validated against the IRIS DB2 file for accuracy. The Validation program matches first on the type of waiver such as Staff, GA, GTA, TA or GRA. Then for Graduate waivers, the program also performs a match on Cost Center/WBS element listed on the CSA Department Waiver Screen and the IRIS DB2 file. If the distribution accounts do not match, the fee waiver is removed and the charge reverts back to the student for payment. If the student has more than one distribution, the department has the opportunity to enter up to three Cost Centers/WBS Elements on the Department Waiver Screen in CSA to be charged. The Cost Center/WBS Element must be associated with the Graduate appointment distribution on IRIS. If the student has a Dual Appointment, GA/GRA, the department has the opportunity to choose which one is charged. The department enters their preference on the Graduate Waiver screen in CSA. Otherwise the charge will be prorated across all distributions based on Cost Percentage associated with each percentage.
NOTE:

The Update Graduate Waiver screen should be used prior to validation to put the fee waiver on the student’s account for GA’s, GTA’s, TA’s and GRA’s. This screen should also be used by the department to specify which position distribution to charge if a student has multiple positions or distributions. This new screen is effective with the other Fall 2004 changes.
CSA TV PROCESSING ROUTINE

At midnight on the last day of each month, the CSA TV processing begins. The transactions for the last month are accumulated in Point-In-Time (PIT) tables. These tables segregate the data from the rest of the CSA database for TV processing based on a transaction timestamp. This insures the integrity of the data. At this point, several programs are run to generate the financial transactions and report the transactions for approval for posting to the general ledger (IRIS). A Bursar’s Office employee reviews the reports to insure that the transactions extracted from the CSA database are accepted for posting. After Bursar’s Office approval, a program is run to send the transactions to the IRIS Knox In-box to be picked up for posting to the ledger. After the Controller’s Office edits and posts the data, the department can view the summarized transactions on their department ledgers in IRIS. To view the detail support for the IRIS ZE documents, you must go to Browse GL Data in CSA. See section on GL DATA for instructions. Access to GL DATA is obtained by completing an IMSP request form. You must request access to the Department Menu – Browse GL Data.

ACCESS TO CSA

This form can be obtained from the Controller’s Office Web-site--http://controller.tennessee.edu/.
Select Access to Financial/HRIS Systems and then Select Application for Access to IMS/CICS

You may request either Inquiry or Update depending on the functions you need to perform in your position. Browse GL DATA would be listed under CSA Other - Inquiry. Departmental NPE’s would also be listed under CSA Other – Inquiry and Update. You do not have to have SIS access to process transactions in CSA.
PROCESSING NON-PERSON ENTITIES (NPE’S)

IN CSA

SECTION 2
NON-PERSON ENTITIES (NPE’S)

CSA processes two types of Non-Person Entities (NPE’s). We have outside agencies or third parties who authorize the University to bill their agency for a student’s fees. These are **External NPE’s.** Examples are Tennessee Vocational Rehabilitation, foreign embassies and trust funds. The second type is **Internal NPE’s.** Athletic scholarships, workshops and University exceptions account for the majority of internal NPE’s. Any departments wishing to award aid to students outside of these categories should contact the Scholarship Section of the Financial Aid Office.

CSA contains an authorization system. This system allows departments to authorize payment of specific student fees to a Fund, Cost Center or WBS Element. The Fund, Cost Center or WBS Element must be set up by the Bursar’s Office as a valid NPE Number before it can be used for authorizations. A maximum dollar amount can be authorized to apply to any fees incurred by the student on his VolXpress statement. Authorizations may also apply to specific fees such as in-state maintenance, program and services fee, facility fee, etc. To access the NPE System:

? Sign on to IMSP
Sign on to the Choice Menu

Sign on to Central Services Accounting Menu
At the CSA Main Menu – Select Non-Person Entity (NPE)
When you reach the NPE Menu, you must make a choice between “Update NPE Fee Allocation” or “Update NPE Student Allocation”.

If you want to authorize a lump sum amount to apply to all VolXpress fee types, select “Update NPE Student Allocation”.
If you want to authorize specific fee types, select “Update NPE Fee Allocation”.

MS100056A Field is required.
NPE STUDENT ALLOCATION

If the department chooses to award a specified amount to be applied to any charges incurred for the term, the department goes into “Update NPE Student Allocation”. (See Above Screen Example.) In the field for Max Allocation Amount, enter the $ amount you are authorizing for the term. Enter “N” in the Max Lock Ind, Exclusion Ind and NPE Billing Fee Ind. Put the last day of the term you are authorizing as the Roll-over Exp. Date. Press “Enter”. The Message “Verify Changes and Press F5 to Update” will appear at the bottom of the screen. If correct, press “F5”. Message “Record(s) Updated Successfully” should appear at the bottom of the screen. Press “F2” to clear and proceed to the next student. Any charges incurred for the specified term will be charged to the NPE up to the maximum amount authorized. After the NPE job processes a charge to the NPE, the Applied Amount Field is updated with the total charged.
**NPE FEE ALLOCATION**

To authorize payment of specific fee types, go to “Update NPE Fee Allocation”. The fee types are available on a HELP screen. Assess HELP by pressing “F4” in a designated field. The most common codes used are:

<table>
<thead>
<tr>
<th>Description</th>
<th>Code</th>
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</thead>
<tbody>
<tr>
<td>Program and Services Fee</td>
<td>0130 0000 0000 RG</td>
</tr>
<tr>
<td>Technology Fee</td>
<td>0135 0000 0000 RG</td>
</tr>
<tr>
<td>Residence Hall</td>
<td>0140 0000 0000 RH *</td>
</tr>
<tr>
<td>Out-of-State Tuition</td>
<td>0150 0000 0000 RG</td>
</tr>
<tr>
<td>Meal Plan</td>
<td>0160 0000 0000 FS *</td>
</tr>
<tr>
<td>In-State Maintenance Fee</td>
<td>0170 0000 0000 RG</td>
</tr>
<tr>
<td>In-State Facility Fee</td>
<td>0136 0000 0000 RG</td>
</tr>
<tr>
<td>Out-of-State Facility Fee</td>
<td>0137 0000 0000 RG</td>
</tr>
<tr>
<td>International Insurance</td>
<td>0100 0000 0000 RG</td>
</tr>
<tr>
<td>Engineering Fee</td>
<td>0175 0000 0000 RG</td>
</tr>
<tr>
<td>Music Fee</td>
<td>0060 0000 0000 RG *</td>
</tr>
<tr>
<td>Biology Fee</td>
<td>0065 0000 0000 RG *</td>
</tr>
<tr>
<td>Art Fee</td>
<td>0070 0000 0000 RG *</td>
</tr>
<tr>
<td>Chemistry Fee</td>
<td>0075 0000 0000 RG *</td>
</tr>
<tr>
<td>Golf Fee</td>
<td>0120 0764 0211 RG</td>
</tr>
<tr>
<td>Bowling Fee</td>
<td>0120 0764 0206 RG</td>
</tr>
<tr>
<td>Transportation Fee</td>
<td>0138 0000 0000 RG</td>
</tr>
</tbody>
</table>

* Residence Hall, Meal Plans and Course Fees require that you authorize specific dorms, meal plans and courses. Use the “F4” HELP Key to view the available choices.
Enter an “A” under “SEL”. Enter the CLASS four digit code and then press “F4” for Help.
When the HELP screen pops up, enter the CLASS four digit code. I used “0100” in the above example. Press ENTER. The available selections for CLASS 0100 will appear. Place an “S” by your selection and press ENTER. Your selection will be returned to the NPE Fee Allocation screen.

You can select to pay a specific dollar figure of a specified fee or a percentage of a specified fee.
For new fee types put an “A” in the Select “SEL” field and complete Item Account ID fields, Allocation Amount OR Allocation Percentage, Status Code and Roll Over Indicator. Complete each fee type to be authorized and press “Enter”. Message “Verify changes and press F5 to update” should appear at the bottom of the screen. If information is correct, press “F5”. Message “Record(s) Updated Successfully” should appear at the bottom of the screen.
Press “F2” to clear and proceed to the next student.

To change an existing fee type, use “C” for Change in place of “A” for Add and make the necessary changes. For an Active/Valid authorization, the ST CD – Status Code will always be “A” for Active. The Roll-Over program has been corrected. You can use this feature to put on a student for multiple terms. To use this feature, the NPE Demo Bio flag must be set to YES to roll. Please contact me to make sure the Demo Bio record is set to roll. Next you authorize the student for the semester. Set the NPE roll-over indicator to Y for YES. After you have everyone authorized on NPE Fee Allocation, go to NPE Student Allocation and set the Roll Over Expiration date to the last day of the term before the last term you want to authorize. For instance, if you wish to have a student’s fee authorization roll until Spring 2007, the Roll Over Expiration date should be 12/15/06.

Notice that the Geology fee is not set to roll to the next semester, while all other fees are set to Y to roll. An example of the NPE Student Allocation screen with the Roll-Over Expiration date set to roll for Spring Semester, 2007 is shown below.
Currently at the end of the semester, all NPE Fee allocations are set to I for Inactive. We would like to have the ability to charge for previous terms, but that is still on our wish list. Currently any prior term NPE charges have to be requested via an e-mail to me.

You cannot delete a Fee Type once the record has been updated. However, you can change the Status Code to “I” for Inactive. Inactive fee types are not processed when the NPE programs run. Use “C” for Change and change the Status Code from “A” to “I”. Press “F5” if correct and the record has been Inactivated. **NOTE: This can only be done BEFORE the NPE processing occurs.** Before processing, the Applied Amount will be blank. After NPE processing, the amount charged to the department appears in the Applied Amount field. At this point, changing to Inactive will only stop any future charges.
As you can see by the above example, if the specified charge is not incurred by the student the authorization is not processed. See above example for Dorm and In-State Facility fee authorization. **TIP: If you do not know if the student is classified as in-state or out-of-state for residency purposes, you can authorize both in-state and out-of-state item accounts. Only the valid charges will be charged to the department.**

To Browse NPE authorizations for a particular student, go to the Non-Person Entity (NPE) Menu and Select “Browse NPE’S For a Student” and press enter.
Enter the student’s ID number and press enter.
The NPE’S and terms authorized for the selected student will be displayed most recent to oldest. Put an “S” for Select in the “SEL” field beside the NPE you want to Browse. The line will be highlighted.

Press “F3” to exit Browse NPE’s and select either Browse NPE Fee Allocation OR Browse NPE Student Allocation to view amounts authorized.

**Timing of Department Charges on Ledger**

NPE’s must be authorized for each term for which you wish to pay the student’s fees. Several times during the semester (beginning approximately one month into the semester) the Bursar’s Office will run the NPE job. This job compares student charges to internal NPE authorizations. The process then generates and posts a payment to the student’s CSA account. The charges will appear on the departmental ledger at the end of the month in which they are processed. No NPE charges will be processed electronically by CSA after the end of the semester. If you need to have a NPE charged to a departmental account after the end of the term, please contact an employee of the Bursar’s Office.
HOW TO USE THE

DEPARTMENTAL

WAIVER

SCREEN

SECTION 3
CSA provides a method for entering GA’s, GTA’s, TA’s and GRA’s into CSA before their PIF is processed in IRIS. Initial VolXpress statements are mailed to students approximately one month before the due date for the next semester. The student will receive ONLY ONE VolXpress statement before the beginning of each term based on their registration date. However, a student may obtain a statement at any time by going to Circle Park on-line at http://www.cpo.utk.edu, Circle Park Services, Fee Payment.

Statements are mailed on a weekly basis for students who register after the initial mailing. In order for the student’s fee waiver to appear on his statement his appointment must appear in IRIS for the upcoming term OR his waiver must be entered on the Graduate Waiver screen. The deadline for the waiver to appear on the statement each term are:

- Spring Semester – Enter on Department Waiver Screen by November 7
- Summer Semester – Enter on Department Waiver Screen by April 25
- Fall Semester – Enter on Department Waiver Screen by July 10

For new GA’s, GTA’s, TA’s and GRA’s, enter the waiver on the Department Waiver Screen when you prepare the PIF. This insures that the waiver payment will show on the student’s account as soon as possible. If a student has multiple positions or cost distributions, enter the position cost center(s) or wbs element(s) to be charged for the student’s fees for the term. You
can enter up to 3 cost cents or wbs elements to be charged and designate the percentage to be charged to each.

**TO ACCESS THE DEPARTMENTAL WAIVER SCREEN:**

? Sign on to IMSP
Sign on to the Choice Menu
At the CSA Main Menu – Select Department Menu

Select Update Graduate Waivers

NOTE: If the student had a spouse/dependent fee waiver as an undergraduate, this may prevent their graduate fee waiver from posting to their account. This is due to overlapping terms. The spouse/dependent fee waiver must be terminated as of the term before the graduate appointment begins.
Enter the student’s ID number and press Enter. The student’s name will be displayed. If you do not have the student’s ID#, you can enter the social security number and it should be replaced by the student’s ID#. You can also perform a name search by going to the name field and entering the last name, a space and the first name and pressing F12. This will bring you to a list of names. Place an “S” beside the name you wish to select and hit “enter”. This should bring the data back to the screen for you.
To **Add** a new appointment, go to the Select Field “SEL” and enter an “A”. Enter the Start and End Dates for the appointment as “2005 SP S”. FA = Fall; SP = Spring; SU = Summer; S = Semester; M = Mini-term. You may enter more than one term at a time if the student is appointed for multiple semesters. **WARNING:** If you enter more than one semester and the student terminates before the end of the period entered, you must go back into CSA and end the appointment. Otherwise, the student will receive a pending fee waiver at the beginning of each semester until the END date is reached. You are required to enter a Cost Center or WBS Element. The system will edit the number to make sure it is a valid IRIS Cost Center or WBS Element. The letter must be a capital “E” or “R”. The charge can be split between a maximum of three Cost Centers/WBS Elements. If splitting the charge, you will need to enter the Percentage to be charged to each Cost Center/WBS Element.

After entering the data, press Enter. The message “Verify changes and press F5 to update” will appear at the bottom of the screen. If correct, press “F5”. Message “Record(s) Updated Successfully” should appear at the bottom of the screen. Press “F2” to refresh to enter the next student.

**NOTE:** THE COST CENTER/WBS ELEMENT ENTERED ON CSA MUST MATCH A COST CENTER/WBS ELEMENTS ON THE STUDENT’S DISTRIBUTION DATA ON PA20 IN IRIS. IF THE COST CENTER/WBS ELEMENT CHANGES DURING THE TERM, THE CHANGE MUST BE ENTERED IN CSA ALSO. OTHERWISE, THE
WAIVER WILL BE REVERSED AND THE CHARGE WILL REVERT BACK TO THE STUDENT.

You have three options available on the Department Waiver Screen. “A” to Add a new appointment, “C” to Change an existing appointment or “D” to Delete and existing appointment. To CHANGE an existing appointment, enter a “C” in the Select “SEL” field, make the change and press enter. If correct, press “F5”. Record should be updated successfully. To DELETE an appointment, enter a “D” in the Select “SEL” field and press Enter. Review and press “F5” to update record.

NOTE: If the appointment is still Active on IRIS with current distribution dates and a minimum 25% FTE, the waiver cannot be deleted from CSA. IRIS will trigger CSA to put the fee waiver back on the student’s account in CSA the next time the student’s schedule is displayed. The distribution must show as ended, the FTE changed to less that 25% FTE or the student’s status must be changed to Withdrawn/Terminated.

DEPARTMENT RESPONSIBILITY

The Department has the option of telling CSA which Cost Center/WBS element to be charged. The department can enter a maximum of three Cost Center/WBS elements to be charged with a percentage to be charged to each. Each of the Cost Center/WBS Elements entered on CSA must be present on the student’s position distribution records on PA20-Cost Distribution by Position in IRIS. If the department does not enter the information into CSA, the information will be taken from IRIS by CSA. When the department prepares a PIF (Personnel Information Form) either to appoint, change or terminate a GA, GTA, TA or GRA, they should also go to CSA and correct the student’s entry on the Department Waiver Screen. In order for the student to be eligible for the fee waiver for each term, they must be on payroll for minimum appointment periods.

MINIMUM APPOINTMENT PERIODS

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<tr>
<th>Semester</th>
<th>Dates</th>
<th>Days</th>
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<tbody>
<tr>
<td>FALL SEMESTER</td>
<td>SEPTEMBER 1 TO NOVEMBER 30</td>
<td>91</td>
</tr>
<tr>
<td>SPRING SEMESTER</td>
<td>FEBRUARY 1 TO APRIL 30</td>
<td>89</td>
</tr>
<tr>
<td>SUMMER SEMESTER – FULL TERM</td>
<td>JUNE 15 TO JULY 31</td>
<td>47</td>
</tr>
<tr>
<td>FIRST SESSION ONLY</td>
<td>JUNE 15 TO JUNE 30</td>
<td>16</td>
</tr>
<tr>
<td>SECOND SESSION ONLY</td>
<td>JULY 1 TO JULY 31</td>
<td>31</td>
</tr>
</tbody>
</table>

If a student’s appointment is not yet reflected in IRIS, the department can enter a pending fee waiver in CSA. Otherwise, the student is responsible for payment of fees to maintain their schedule. Entry of a pending fee waiver gives the student the waiver benefit and reduces the amount the student has to pay to hold their semester schedule. If the student has paid his fees and then receives a fee waiver, a refund is not issued until the appointment appears on payroll. The Bursar’s Office validates all payroll based fee waivers approximately 40 days into the term. At that point, refunds are issued automatically. The refunds are mailed to the student’s Billing Address. If the student paid by credit card, the refund will be issued back to the credit card.
GRADUATE STUDENT WAIVER RULES

1. Student must be classified as a Graduate/Law student for registration/admission purposes.
2. Student must be appointed a minimum of 25% FTE as either a graduate assistant, graduate teaching assistant, graduate teaching associate or as a graduate research assistant. The student MUST have ONE position totaling 25% FTE. Positions cannot be combined to meet the 25% FTE.
3. Student must be appointed on payroll for the minimum appointment period for each semester listed below:

   MINIMUM APPOINTMENT PERIODS
   FALL SEMESTER  SEPTEMBER 1 TO NOVEMBER 30  91 DAYS
   SPRING SEMESTER  FEBRUARY 1 TO APRIL 30  89 DAYS
   SUMMER SEMESTER – FULL TERM  JUNE 15 TO JULY 31  47 DAYS
   FIRST SESSION ONLY  JUNE 15 TO JUNE 30  16 DAYS
   SECOND SESSION ONLY  JULY 1 TO JULY 31  31 DAYS

Any student appointed for part of the minimum appointment period will receive a pro-rated waiver based on the number of days employed during the minimum appointment period. For example, a person employed 9/1 to 9/30 (30 days) would receive a waiver for 30 days divided by 91 days (number of days in Fall minimum appointment period) multiplied times the student’s fees for the term based on number of hours enrolled. (30/91 X $ Fees = Waiver Amount). The student is responsible for the balance of his fees for the term (10/1 to 11/30).

4. The student must have a valid social security number in BOTH IRIS and CSA. The number is used behind the scene to identify and match the student between the two systems. To add a SSN to IRIS, go to the IRIS website, select IRIS forms from the side-bar on the right side of the window, select Paper Forms and then select the Personal Data Form. Complete the Personal Data and submit it to HR along with a copy of the social security card and a new W-4 form. See screen navigation and form on the next page. To have the ssn added to CSA/student demo-bio record, please have the student take their social security card to see Joyce Glenn in the Registrar’s Office, 212 Student Services Building.
### Human Resources/Payroll Forms

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<tr>
<th>Form Name</th>
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<th>Instructions</th>
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<tbody>
<tr>
<td>Additional Pay</td>
<td>Excel</td>
<td>Instructions</td>
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<tr>
<td>Corporate Function Supplement Form (UF Extension Only)</td>
<td>PDF</td>
<td>Instructions</td>
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<td>Change Position</td>
<td>E-Form</td>
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<td>Create Position</td>
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<td>Employee Termination Correction Form</td>
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<tr>
<td>Hire and/or Current Labor</td>
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<td>Initial Home/Relocate Employee</td>
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<tr>
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<td>E-Form</td>
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</tr>
</tbody>
</table>

### THE UNIVERSITY OF TENNESSEE

### PERSONAL DATA FORM

**Effective Date**

**Personal Data (IT0002)**

- **Personnel #:**
- **Form of Address:**
  - Mr.
  - Mrs.
  - Miss
  - Ms.
  - Dr.
- **Last Name:**
- **First Name:**
- **Middle Name:**
- **Known as:**
- **Soc. Security #:**
- **Birth date:**
- **Gender:**
  - Male
  - Female
- **Nationality:**
- **Marital Status:**
  - Single
  - Married
  - Civil Partner
- **Name Change:**
  - **Previous Name:**

**Permanent Residence (IT0068-Subtype 1)**

**CO:**

**Street:**
Before an International Student can be employed as a GA, GTA or GRA, they must present the International Office with a GA Financial Verification form available on the CIE website at: http://web.utk.edu/~globe/students/forms.php
The student must also complete an Employment Verification form to apply for a Social Security Number. See the CIE website at: [http://web.utk.edu/~globe/students/forms.php](http://web.utk.edu/~globe/students/forms.php).

The student and his/her department must complete these forms and return them to CIE at 1620 Melrose Avenue.

All of this information is covered with the student during their International Orientation session.
Instructions to Departments

Please read the following instructions PRIOR TO issuing an on-campus verification memorandum to the F-1 student.

The Social Security Administration requires the UT Center for international Education (CIE) verify specific information pertaining to the student's on-campus employment before a student is eligible to apply for a social security number. An F-1 international student who has an on-campus job and needs to apply for a social security number must provide CIE with a departmental employment verification memo BEFORE they can apply for the social security number.

On the following page you will find a sample memorandum for departmental use.

You can fill in the appropriate information and print the document using Acrobat Reader.

Date

Employment Verification Memorandum

To Whom It May Concern:

This memo serves as evidence of on-campus employment for ________________________ who is an F-1 student at The University of Tennessee

The student's Job Description is

________________________________________

His/Her anticipated or actual start date of employment _____________ and the number of hours per week is __________________

Employer contact information:

____________________________________
If the student has a break in his IRIS payroll distribution periods for the term, the waiver will be pro-rated. For example, a student has a payroll distribution for 9/1 to 9/15 and 11/1 to 11/30. This student will be charged a pro-rated fee for 9/16 to 10/31. If the student is classified as an out-of-state student, the pro-rated fee will be based on out-of-state tuition.

If the student is paid from an E01 Cost Center or an R01 WBS Element that is Centrally Funded, the in-state and out-of-state tuition will be charged to the Central Pool Account, E019005. All other Cost Centers and WBS Elements will be charged for the in-state portion of the fees with the out-of-state portion going to the Central Pool Account. If the student has multiple positions/distributions, the in-state fees will be pro-rated based on how much they are paid from each distribution. The department can choose the Cost Center or WBS element to charge. However, it must be a Cost Center or WBS element found on the student’s cost distribution on PA20.

If an eligible appointment is not found to match the data on the Graduate Waiver Screen, the fee waiver credit will be reversed and the fees charged to the student.

**IMPORTANT: CSA AND IRIS MUST MATCH OR THE FEE WAIVER WILL BE REVERSED AND THE FEES CHARGED TO THE STUDENT.** If you do a PIF to change or terminate a student’s appointment type or distribution accounts, you must also make an entry in CSA on the Graduate Waiver Screen. Only changes made within the minimum appointment period will be automatically calculated by CSA. Fee Waivers have to be manually calculated and entered after the end of the minimum appointment period each semester. Please contact the Bursar’s Office if you have a change or correction at the end of the term or for a prior term. If you are simply moving charges from one Cost Center/WBS Element to another in your department, you can do so without contacting the Bursar’s Office. During the Minimum Appointment Period, ask the student to display their class schedule on CPO to cause their fee waiver to re-calculate in CSA.

**SINGLE/DUAL/SPLIT POSITIONS/DISTRIBUTIONS**

If the student has DUAL positions made up of a GRA, a GA, GTA or TA appointment, fees are handles as follows:

1. If nothing is entered on the CSA Graduate Waiver Screen, the fee waiver credit will be added when the position(s) are entered in IRIS. For a GA, GTA, GTAssoc or GRA on other than budget entity “01” payroll distribution, the in-state tuition is charged to the cost distribution fund(s). **This change is effective Fall 2003.**

2. For a GA, GTA, GTAssoc, or GRA on a budget entity “01” payroll distribution and the cost center has a staff benefits flag of “1” (benefits self funded) or any WBS element, the in-state tuition is charged to the cost distribution(s) unless otherwise specified in CSA. **This change is effective Fall 2004.**

3. If the student has a GA, GTA or GTAssoc, or GRA on a budget entity “01” payroll distribution and the cost center has a staff benefits flag of “2” (benefits centrally funded),
the in-state tuition is charged to the Central Pool Account, E019005. This change is effective Fall 2004.

4. If the student has multiple positions, the fee waiver will be prorated to each position based on the proportion of the student’s total FTE in each position (even if one of the positions has an FTE of less than 25%). The charge of the waiver will be allocated based on the rules in 1-3 outlined above. This change is effective Fall 2004.

5. If the student has multiple distributions within a position, the proportion of the waiver to be charged to each distribution within the position will be prorated based on the cost distribution of the salary amount paid by that position unless otherwise specified in CSA. This change is effective Fall 2004.

If the department prefers to select which Cost Center/WBS element is charged for the fee waiver, they must do so in CSA using the Graduate Waiver Screen. The Cost Center or WBS element must be found on the student’s Cost Distribution on PA20 of IRIS for that student.

TERMINATION OF APPOINTMENT

TERMINATION AND STUDENT STAYS IN SCHOOL

If a student terminates his GA, GTA, TA or GRA appointment during the minimum appointment period, his fees will be prorated for the balance of the term. The number of days in the minimum appointment period and the number of days the student is not on payroll will be used to determine the student’s charge. Example: Student terminates on 9/30. The student owes 61/91 X $ Fees = Amount Due. The student will owe the fees for October 1 through November 30.

TERMINATION AND STUDENT WITHDRAWS FROM SCHOOL

A student who terminates his assistantship and withdraws from school could be responsible for a pro-rated portion of his fees. If the withdrawal date is the same OR earlier than the termination date of the assistantship, the department is responsible for the student’s fees. The student who terminates his assistantship and withdraws at a later date must pay a pro-rated portion of his fees. A manual entry will be required to adjust the tuition for the fees covered by the department. Please contact the Bursar’s Office with the information.

EXCEPTION FOR GRADUATING STUDENTS

A student who terminates his appointment and meets the following conditions is eligible for a fee exception for payment of fees. If the student:

1. Has completed ALL degree requirements
2. Left assistantship to accept a position outside of the University OR a Regular Staff position at The University of Tennessee
3. Will graduate at the end of current term
4. Exception is requested in writing by the Department
The department should send a memo or e-mail to the Bursar’s Office stating that the student has met **ALL** of the conditions listed above. The fees will then be charged to the appropriate Cost Center/WBS Element based on the student’s position at the time of termination. The student will not be held responsible for any tuition charges. The student will need to pay any remaining non-tuition charges such as graduation fee, Program & Services fees, Technology Fee, Transportation Fee, Facility fee and any course related or lab fees.

Questions: Susan Forman, 974-1384 or e-mail Sforman@utk.edu
   Thelma Vandergriff, 974-1394 or e-mail tvanderg@utk.edu
   Cindy Duncan, 974-1383 or e-mail Cduncan1@utk.edu
   Fax – 974-1945
GENERAL LEDGER

INQUIRY

SCREENS

ON CSA

Section 5
DISPLAY LEDGER DETAILS

Sign onto IMSP
**Sign on to the Choice Menu**

**Sign on to Central Services Accounting Menu**
Select Browse GL DATA
Enter the Fund, Cost Center or WBS Element for the ZE Transfer Voucher if the ZE was processed January 2002 to present. For transactions charged December 2001 and back, please enter the Legacy Account Number and Object Code. You will also need the TV Number and GL Number. Press Enter and the TV detail will be displayed. If the TV is more than approximately 250 lines, it will be displayed in sections. The Debit/Credit totals will change with the portion displayed. This restriction should effect only a small portion of users. To move forward to the next section of the TV, choose a name from the end of the current section or the next name expected. The next section should be displayed.

Due to the transaction line limitation in IRIS, you may have to add several IRIS documents together to match the Debit/Credit total on CSA.
The student detail information would also be included. I have left it out to insure the student’s privacy. Note that it takes both entries for Document #2100013893 to equal the Debit total on CSA.

If you do not know the TV number, enter the Fund, Cost Center or WBS Element and press Enter. Then tab to the TV Number field and press “F4” for Assistance. The TV numbers for the Fund, Cost Center or WBS Element will be displayed by TV Number, GL Number and Posting Period.

There may be more than one page of TVs. Press “F8” to go forward and “F7” to scroll back to the top. Enter an “S” in the Select “SEL” field beside the TV you want to display. Press Enter. You will be taken back to the “Display Ledger Detail Screen”. NOTE: If more than one GL Number is associated with a single TV number, the TV will be shown multiple times broken down by GL Number.
On the above example, TV number 000310023 is listed 3 times. OBJ CD is the same as the GL number. The TV number is broken down by GL Numbers 443102, 443103 and 443104.

If you are looking up TV detail prior to January 2002, use the Legacy Account number and Object Code.

If you have questions, please contact Susan Forman in the Bursar’s Office at 974-1384 or e-mail Sforman@utk.edu.
AN OVERVIEW

OF

FEE WAIVERS

AND

FEE REDUCTIONS

Section 6
AN OVERVIEW OF FEE WAIVERS AND FEE REDUCTIONS

There are many types of fee waivers and discounts/fee reductions offered at The University of Tennessee. A summary of each type of fee waiver or discount/fee reduction follows:

BOARD OF REGENTS – STAFF: (TCA 49-7-116, PC191) A Board of Regents staff member may come to The University of Tennessee and take one course (regardless of hours) free of charge. The waiver covers one course regardless of the number of credit hours for either Undergraduate or Graduate credit. The waiver includes In-State Maintenance fee, Out-of-state Tuition if applicable, Program & Services Fee, Technology fee, Facility fee and Transportation fee. If the student takes more than one course, the waiver is pro-rated based on the following formula:

\[
\text{Hours in Excess of one course} \times \text{Total Hours} = \text{Charge to BOR Employee}
\]

Example: Student is taking 2-3 hour courses. Waiver equals 3/6 X Total Charge for the credit hours. A fee waiver reduction code is entered on the Waiver Reduction screen. The code is 157. These fees are charged to a University Pool Account for Board Of Regents charges-E019100 with a GL of 444100.

Tennessee Board of Regents Institutions are:

Universities and Community Colleges

<table>
<thead>
<tr>
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<th>Address</th>
<th>Telephone Number</th>
<th>Toll Free</th>
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<tbody>
<tr>
<td>AUSTIN PEAY STATE UNIVERSITY</td>
<td>601 COLLEGE STREET CLARKSVILLE, TN 37044</td>
<td>931-221-7011</td>
<td>1-800-844-2778</td>
</tr>
<tr>
<td>MIDDLE TENNESSEE STATE UNIVERSITY</td>
<td>1301 EAST MAIN STREET MURFREESBORO, TN 37132</td>
<td>615-898-2300</td>
<td>1-800-331-MTSU</td>
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<tr>
<td>TENNESSEE TECHNOLOGICAL UNIVERSITY</td>
<td>1 William Jones Drive COOKEVILLE, TN 38505</td>
<td>931-372-3101</td>
<td>1-800-255-8881</td>
</tr>
<tr>
<td>EAST TENNESSEE STATE UNIVERSITY</td>
<td>UNIVERSITY PARKWAY &amp; W. WALNUT STREET JOHNSON CITY, TN 37614</td>
<td>423-439-1000</td>
<td>1-800-462-3878</td>
</tr>
<tr>
<td>TENNESSEE STATE UNIVERSITY</td>
<td>3500 JOHN MERRITT BLVD. NASHVILLE, TN 37209-1561</td>
<td>615-963-5000</td>
<td>1-888-536-7655</td>
</tr>
<tr>
<td>THE UNIVERSITY OF MEMPHIS</td>
<td>CENTRAL &amp; PATTERSON MEMPHIS, TN 38152</td>
<td>901-678-2000</td>
<td>1-800-669-2678</td>
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Tennessee Technology Centers

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<th>Fax</th>
<th>Directors e-mail</th>
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<tr>
<td>Athens</td>
<td>423-744-2814</td>
<td>423-744-2817</td>
<td>Stewart Smith</td>
</tr>
<tr>
<td>PO Box 848</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Athens, TN 37371-0848</td>
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</tr>
<tr>
<td>Chattanooga</td>
<td>423-697-4433</td>
<td>423-697-3203</td>
<td>Dr. James Barrott</td>
</tr>
<tr>
<td>4501 Amnicola Highway</td>
<td></td>
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<tr>
<td>Chattanooga, TN 37406</td>
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CHATTANOOGA STATE TECHNICAL COMMUNITY COLLEGE
4501 AMNICOLA HIGHWAY
CHATTANOOGA, TN 37406
Telephone Number: 423-697-4400
Toll Free: 1-877-398-2545

COLUMBIA STATE COMMUNITY COLLEGE
1665 HAMPshIRE HIGHWAY
COLUMBIA, TN 38401
Telephone Number: 931-540-2722
Toll Free: 1-877-469-8720

JACKSON STATE COMMUNITY COLLEGE
2046 NORTH PARKWAY
JACKSON, TN 38301
Telephone Number: 731-424-3520
Toll Free: 1-800-355-JSCC
(901 Area Accessible Only)

NASHVILLE STATE TECHNICAL COMMUNITY COLLEGE
120 WHITE BRIDGE ROAD
NASHVILLE, TN 37209
Telephone Number: 615-353-3333
Toll Free: 1-800-272-7363

PELLISSIPPI STATE TECHNICAL COMMUNITY COLLEGE
10915 HARDIN VALLEY ROAD
KNOXVILLE, TN 37933-0990
Telephone Number: 865-694-6400

SOUTHWEST TENNESSEE COMMUNITY COLLEGE
P.O. BOX 780
MEMPHIS, TN 38101-0780
Telephone Number: 901-333-STCC
Toll Free: 1-877-717-STCC

WALTERS STATE COMMUNITY COLLEGE
500 S. DAVY CROCKETT PARKWAY
MORRISTOWN, TN 37813-6899
Telephone Number: 423-585-2600
Toll Free: 1-800-225-4770

CLEVELAND STATE COMMUNITY COLLEGE
3535 ADKISSON DRIVE
CLEVELAND, TN 37312
Telephone Number: 423-472-7141
Toll Free: 1-800-604-2722

DYERSBURG STATE COMMUNITY COLLEGE
1510 LAKE ROAD
DYERSBURG, TN 38024
Telephone Number: 731-286-3200

MOTLOW STATE COMMUNITY COLLEGE
P O BOX 8500
 Lynchburg, TN 37352-8500
Telephone Number: 931-393-1500
Toll Free: 1-800-654-4877

NORTHEAST STATE TECHNICAL COMMUNITY COLLEGE
2425 HIGHWAY 75
BLOUNTVILLE, TN 37617
Telephone Number: 423-323-3191
Toll Free: 1-800-836-7822

ROANE STATE COMMUNITY COLLEGE
276 PATTON LANE
HARRIMAN, TN 37748
Telephone Number: 865-354-3000
Toll Free: 1-800-343-9104
EXT 4523

VOLUNTEER STATE COMMUNITY COLLEGE
1480 NASHVILLE PIKE
GALLATIN, TN 37066
Telephone Number: 615-452-8600
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<tr>
<td>Covington</td>
<td>PO Box 249</td>
<td>901-475-2526</td>
<td>901-475-2528</td>
<td>William Ray</td>
</tr>
<tr>
<td>Crossville</td>
<td>P.O. Box 2959</td>
<td>931-484-7502</td>
<td>931-484-8911</td>
<td>James Purcell</td>
</tr>
<tr>
<td>Crump</td>
<td>Highway 64 West</td>
<td>731-632-3393</td>
<td>731-632-3018</td>
<td>Dan Spears</td>
</tr>
<tr>
<td>Dickson</td>
<td>426 Highway 91</td>
<td>615-441-6220</td>
<td>615-441-6223</td>
<td>Bobby Sullivan</td>
</tr>
<tr>
<td>Elizabethton</td>
<td>P O Box 789</td>
<td>423-543-0070</td>
<td>423-547-2587</td>
<td>Jerry Patton</td>
</tr>
<tr>
<td>Harriman</td>
<td>P O Box 1109</td>
<td>865-882-6703</td>
<td>865-882-5038</td>
<td>Mark E. Powers</td>
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<tr>
<td>Hartsville</td>
<td>716 McMurry Blvd</td>
<td>615-374-2147</td>
<td>615-374-2149</td>
<td>Mae Banks</td>
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<tr>
<td>Hohenwald</td>
<td>813 West Main Street</td>
<td>931-796-5351</td>
<td>931-796-4892</td>
<td>Rick Brewer</td>
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<tr>
<td>Jacksboro</td>
<td>P.O. Box 419</td>
<td>423-566-9629</td>
<td>423-566-9713</td>
<td>David Browder</td>
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<tr>
<td>Jackson</td>
<td>2468 Westover Road</td>
<td>731-424-0691</td>
<td>731-423-5303</td>
<td>Dr. Don Williams</td>
</tr>
<tr>
<td>Jackson/Lexington</td>
<td>230 South Broad Lexington, TN 38351</td>
<td>731-967-1795</td>
<td>731-967-0087</td>
<td>Dr. Don Williams</td>
</tr>
<tr>
<td>Knoxville</td>
<td>1100 Liberty Street</td>
<td>865-546-5568</td>
<td>865-971-4474</td>
<td>David Esa</td>
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<tr>
<td>Livingston</td>
<td>P O Box 219</td>
<td>931-823-5525</td>
<td>931-823-7484</td>
<td>Ralph Robbins</td>
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<tr>
<td>McKenzie</td>
<td>P. O. Box 427</td>
<td>731-352-5364</td>
<td>731-352-3258</td>
<td>Elizabeth Check</td>
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<tr>
<td>McMinnville</td>
<td>241 Vo-Tech Drive</td>
<td>931-474-TECH</td>
<td>931-473-6380</td>
<td>Andy Forrester</td>
</tr>
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<tr>
<td>Memphis</td>
<td>550 Alabama Avenue, Memphis, TN 38105</td>
<td>901-543-6100 901-543-6197</td>
<td>Russell Shelton</td>
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<tr>
<td>Morristown</td>
<td>821 W. Louise Avenue, Morristown, TN 37813-2094</td>
<td>423-586-5771 423-586-8030</td>
<td>Lynn Elkins</td>
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<tr>
<td>Murfreesboro</td>
<td>1303 Old Fort Parkway, Murfreesboro, TN 37129</td>
<td>615-898-8010 615-893-4194</td>
<td>Monty Thomas</td>
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<tr>
<td>Nashville</td>
<td>100 White Bridge Road, Nashville, TN 37209</td>
<td>615-425-5500 615-425-5582</td>
<td>Dr. Johnny Williams</td>
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<tr>
<td>Newbern</td>
<td>340 Washington Street, Newbern, TN 38059</td>
<td>731-627-2511 731-627-2310</td>
<td>Wallace Sexton</td>
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<tr>
<td>Oneida/Huntsville</td>
<td>355 Scott High Drive, Huntsville, TN 37756</td>
<td>423-663-4900 423-663-4925</td>
<td>Dwight Murphy</td>
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<tr>
<td>Paris</td>
<td>312 S. Wilson, Paris, TN 38242</td>
<td>731-644-7365 731-644-7368</td>
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<tr>
<td>Pulaski</td>
<td>P O Box 614, Pulaski, TN 38478</td>
<td>931-424-4014 931-424-4017</td>
<td>James Dixon</td>
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<tr>
<td>Ripley</td>
<td>127 Industrial Drive, North Industrial Park, Ripley, TN 38063</td>
<td>731-635-3368 731-635-4674</td>
<td>Brian Collins</td>
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<tr>
<td>Shelbyville</td>
<td>1405 Madison Street, Shelbyville, TN 37160</td>
<td>931-685-5013 931-685-5016</td>
<td>Ivan Jones</td>
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<tr>
<td>Whiteville</td>
<td>P O Box 489, Whiteville, TN 38075</td>
<td>731-254-8521 731-254-9558</td>
<td>Jeff Sisk</td>
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GRADUATE ASSISTANTS, TEACHING ASSISTANTS AND TEACHING ASSOCIATES, AND GRADUATE RESEARCH ASSISTANTS: Waiver applies to In-state Maintenance and Out-of-state Tuition if applicable. Student is responsible for payment of Program & Services, Technology, Facilities, Transportation, all late fees and course related fees. In-State Maintenance is charged based on Cost Center or WBS payroll distributions. The Out-of-state Tuition is waived to the Central Pool Account, E019005, GL 444100 for each Cost Center or WBS Element. The Out-of-state tuition is later written off with an SA with a credit to E019005 and a debit to the Out-of-state tuition account – I010100026 by the Bursar’s Office. The student’s Residency Status is not affected by this accounting entry.

The student must be classified as either Graduate or Law for admissions and registration purposes and must have a Job Object Code of 30000239, 30000240, 30000241, or 30000242 in IRIS on PA20. The only exceptions are Law Clerks working for the Vice President for General Counsel.
The student must be on IRIS PA20 with a minimum 25% FTE position. They are not supposed to exceed 50% FTE unless they receive special approval. Position Job Object Code must be:

Graduate Assistant 30000239
Graduate Research Assistant 30000240
Graduate Teaching Assistant 30000241
Graduate Teaching Associate 30000242

The position payroll distributions must cover the Minimum Appointment Period for each semester in order to be eligible for a fee waiver for the entire semester.

- **Fall Semester**
  - September 1 – November 30 (91 days)
- **Spring Semester**
  - February 1 – April 30 (89 days)
- **Summer Semester (Full Session)**
  - June 15 – July 31 (47 days)
- **First Session ONLY**
  - June 15 – June 30 (16 days)
- **Second Session ONLY**
  - July 1 – July 31 (31 days)

Graduate students who otherwise qualify for waivers during the academic year are eligible for a Summer waiver ONLY if the student is in an eligible position and in an active status on IRIS during the minimum appointment period, June 15 through July 31. Payroll cost distributions for 9 month positions that are paid over 12 months would be eligible for Summer waivers if the end date for the distribution is July 31 or later.

If a student’s position does not cover the entire minimum appointment date range (appointed late or terminated early), the following prorated formula is used to calculate the amount of the fee waiver:

\[
\text{Number of days covered by position} \times \frac{\text{Normal fee for all courses enrolled}}{\text{Number of Days in Min Appt period (see above)}} = \text{Wvd}
\]

If a student has a break in payroll distribution periods for the semester, the fee waiver will be prorated.

GA’s, GTA’s, GTAssoc’s and GRA’s cannot receive a waiver of maintenance and tuition charges and a third party (NPE) billing covering the same charges. The NPE can ONLY be charged for fees not covered by the fee waiver.

**FICA and Student Health Insurance:**

In order to be eligible for Student Health Insurance and exemption from FICA taxes, a GRA must be enrolled in at least 3 hours. If enrolled in less than 3 hours the student will receive the graduate fee waiver, but would be charged FICA taxes on Summer Earnings. If they are registered for the following Fall Semester for at least 3 hours, they can continue in the student health insurance at their own expense.
EXCEPTIONS: If a GA, GTA or GTAssoc or GRA terminates his position during the semester to become a REGULAR University employee, the fee waiver is pro-rated based on the number of days covered by each position. This is the only time a staff waiver is granted for positions beginning after the first day of class without special approval. This is a manual process. You must notify the Bursar’s Office to have the waiver calculated and posted to the student’s account.

If a GA, GTA or GTAssoc or GRA terminates his appointment prior to the end of a semester because he has completed ALL of his degree requirements, will graduate at the end of the semester and has left to take another position, the department can ask to pay the fees. A written statement/e-mail must be sent to the Bursar’s Office from the department. This is a manual fee waiver calculation.

TIPS:
The department can select which position distribution is charged if the student has multiple positions and/or distributions. The department must enter the position to be charged on the Graduate Waiver Screen in CSA. If the position entered on CSA can be validated against payroll at Validation, the appropriate Cost Centers/WBS Elements will be charged. See Instructions for Department Waivers.

To cause a Payroll based fee waiver to re-calc, display the student’s schedule in CSA or have the student display their class schedule on CPO. To let IRIS add the fee waiver to CSA, delete the fee waiver entry on the Department Waiver Screen, display the student’s schedule for the current term, and the waiver should post from IRIS.

A system-wide re-calc should be performed at the end of each Minimum Appointment period BEFORE month-end processing. A system-wide re-calc is done approximately 40-45 days into the term for Fee Waiver Validation. After validation, only eligible fee waivers will post to CSA. CSA does not calculate fee waivers after the end of the Minimum Appointment period. Call the Bursar’s Office for any fee waiver issues for prior terms or after the end of the Minimum Appointment period each semester.

The fee waiver information on the Graduate Waiver Screen in CSA must have a matching position in IRIS. CSA will attempt to match the Cost Center or WBS element listed in CSA to the student’s position Cost Distributions for the valid dates. The Cost Center or WBS element to charge must have a matching Cost Center or WBS element in IRIS. PLEASE NOTE THAT THE STUDENT MUST HAVE A SOCIAL SECURITY NUMBER IN BOTH CSA AND IRIS IN ORDER TO BE IDENTIFIED. BOTH SYSTEMS USE A 9 DIGIT ID#, BUT THEY DIFFER ACROSS THE SYSTEMS. THE SSN IS THE BACKGROUND IDENTIFIER AND IS REQUIRED FOR TAX REPORTING TO THE IRS. FORMS FOR INTERNATIONAL STUDENTS TO APPLY FOR A SSN GO THROUGH THE INTERNATIONAL OFFICE.

SPOUSE/DEPENDENTS OF UT EMPLOYEES (INCLUDING ROTC)
See Personnel Policy, Section 300, Policy 331 – A Dependent of a UT employee must be age 26 or younger. Student, Spouse or Dependent, must be classified as an Undergraduate student for Admission and Registration purposes. If the staff member is 100% FTE, the fee waiver will be 50% of In-state Maintenance fees. The fee waiver eligibility, account charge, and FTE is based on the first official day of class each semester. If less than 100% FTE but at least 50% FTE for one or more years, the fee waiver is calculated by:

**Percentage of Employment X In-state Maintenance fee**

\[
\text{Amount Waived} = \frac{\text{Percentage of Employment} \times \text{In-state Maintenance fee}}{2} \]

The amount waived is charged to the Employee’s department based on the employee’s payroll distribution Cost Center or WBS Element with a GL of 422200. If an employee is paid from an “R” WBS Element, the fees are charged to the Intra-Campus Fee Waiver pool account, E019103. This is due to the restriction on “R” WBS Elements.

If the employed is paid from an E20 Cost Center or an R20 WBS Element, the fees are charged to UHS Fee Waivers, R170145004.

When the initial fee waiver form is presented to Human Resources, an entry is made in CSA on the “Update Fee Waive and Fee Reduction Screen”.

![Cashier System menu](image-url)
Required Entry fields include: Student SSN, Waiver-Reduction Code, Beginning Term, Ending Term, Relation ID (Employee’s SSN) and Employee’s Department Account Number (Cost Center or WBS Element).
The Waiver-Reduction Codes for UT Spouse/Dependents are:

- Staff Spouse 155
- Staff Dependent 156
- ROTC Spouse 169
- ROTC Dependent 170

A Dependent is authorized with an end term of the semester he turns 26. A Spouse is authorized with an indefinite end term. Spouse/Dependents of regular faculty, staff members, visiting faculty and medical residents/interns are treated as in-state students for fee purposes. If classified as Out-of-state for Residency purposes, the student must apply for a special Residency Status through the Admissions Office to be treated as in-state for fee purposes.

The Employees eligibility on the First Day of Class of the semester shall determine the student’s eligibility for the semester. Spouse/dependents of regular part-time employees who have one or more years of regular continuous service working a minimum of 50% FTE shall receive a pro-rata discount based on percent of effort on the First Day of Class for the Semester.

Spouse and Dependents of UT Employees are also eligible for fee discounts at other UT campuses and at Tennessee Board of Regents Institutions.

**SPOUSE/DEPENDENTS OF UT RETIREES OR DECEASED EMPLOYEES**

Spouse/Dependents of UT Retirees (HR0331) or employees who die while still employed by The University are entitled to the fee discounts outlined below:

Spouses of employees who had 10 or more years of regular continuous full-time service with the University immediately preceding retirement or death are eligible for the fee waiver discount for 5 years from the date of retirement or death of the employee. Dependent children of such employees are eligible for the fee discount through age 26.

Spouses of employees who had less than 10 years of regular continuous full-time service with the University immediately preceding retirement or death are eligible for the fee waiver discount for two years from the date of retirement or death of the employee. Dependent children of such employees are eligible for the fee discount for two years or through age 26, whichever comes first.

A 25% discount is available through age 23 for children of full-time university (or state of Tennessee) employees who are killed on the job in the line of duty or who die while employed full-time.
Spouses of employees who had 10 or more years of regular continuous part-time service immediately preceding retirement or death are eligible for the fee discount on a pro-rata basis for two years from the date of retirement or death of the employee. Dependent children of such employees are eligible for the fee waiver discount on a pro-rata basis for two years or through age 26, whichever comes first. The pro-rata discount will be based on the % FTE worked by the employee at the time of retirement or death.

The fee waiver discount is charged to the Intra-Campus Pool account, E019103 with a GL of 422200. The employees eligibility status on the first day of class for the semester will determine the student’s eligibility for the term.

The Waiver/Reduction Codes for Spouse/Dependants of UT Retired or Deceased Employees are:

- Spouse-Deceased Staff  167
- Dependent-Deceased Staff  168
- Spouse-Retired Staff  171
- Dependent-Retired Staff  172

An approved Spouse/Dependent Fee Discount form must be completed and processed through Human Resources. An employee in Human Resources will enter the information into CSA.

Fee Waiver Discounts are also available for Spouse/Dependants at other University of Tennessee campuses and at Tennessee Board of Regents Institutions. A form must be submitted each semester to the Board of Regents Institutions.

### SPOUSE/DEPENDENTS OF TENNESSEE BOARD OF REGENTS EMPLOYEES

Spouse/Dependants of Tennessee Board of Regents (TBR) Institutions (HR 330) are eligible to have up to 50% of their in-state maintenance, program & services, technology and facilities fee and transportation fees billed to the TBR employee’s institution. The student must furnish a Fee Authorization form each semester. The forms are handled as External NPE Third Party billings. The $20 Billing fee is not assessed on these billings.

**Per a memo from Sylvia Davis, these students are to be treated as in-state students for fee payment purposes.** The Admissions Office should enter a special residency code to allow payment of in-state fees. Only a small percentage of these students would be classified as out-of-state in normal circumstances.
STATE EMPLOYEES (TCA 8-50-114)

A State Employee is eligible for waiver of one course (regardless of hours) each semester. The fee waiver covers in-state maintenance, out-of-state tuition if applicable, programs and services fee, technology fee, transportation fee and facilities fee. A fee waiver authorization must be submitted each semester. A Bursar’s Office employee will enter a fee waiver reduction code of 159 on the Waiver Reduction screen in CSA. If the student takes more than one class, the tuition and fees will be pro-rated based on the following formula:

\[
\frac{\text{Hours in Excess of one course}}{\text{Total Hours}} \times (\text{inc P&S, Tech, Fac & Trans}) = \text{Chg to State Employee}
\]

Because the State defines Summer as including 2 semesters, all state employees are eligible for a fee waiver for two courses during Summer term (regardless of the number of hours of the courses) if the requirements below are met.

The two Summer semester courses cannot overlap. In other words, the student cannot be enrolled in a full term course and a second session course and receive the waiver. The courses have to be in separate sessions.

The employee can use the waiver for no more than 4 courses for each academic year. This does include Mini Term. When entering the waiver, make sure the employee has not already attempted 4 courses.

This is for Summer term only, the original rule of 1 course per semester applies to Fall and Spring.

Since CSA is programmed for 1 course per semester, the waiver for the second course must be added manually.

The waiver is charged to Cost Center E019102 with a GL of 444100.

RETIRED STATE EMPLOYEES WITH 30 YEARS OF SERVICE (TCA 49-7-113)

Persons who have retired from state service with thirty (30) or more years of service, regardless of age, and who are domiciled in Tennessee, may audit courses at any state supported college or university without paying tuition charges, maintenance fees, student activity fees or registration fees. This privilege may be limited or denied by the college or university on an individual classroom basis according to space availability. This does not apply to medical, dental or pharmacy schools.

CSA code pending as of Fall 2006.
STATE EMPLOYEE DEPENDENTS (TCA 8-50-115)

Dependents of State Employees are eligible for a 25% waiver discount of the in-state Maintenance fee. The student must be classified as an Undergraduate student for Admissions and Residency purposes and under the age of 24. A dependent of a State Employee must fall in the following categories:

1. Parent is a full-time employee in the State of Tennessee
2. Parent died while employed full-time
3. Parent was killed on the job or in the line of duty while employed as a full-time employee of the State of Tennessee
4. Parent is a retired employee of the State of Tennessee who retired after a minimum of 25 years of full-time creditable service

The fee waiver reduction code is 160 and will be entered on the Waiver Reduction screen by a Bursar’s Office employee on receipt of the Fee Waiver authorization. A new form must be submitted each semester. The deadline for the form is the last day of Final Exams for the semester. Forms for previous semesters will not be accepted. The fees are charged to E019106, GL 444100.

DEPENDENTS OF TENNESSEE PUBLIC SCHOOL TEACHERS (TCA 49-7-119)

Dependents of licensed public school teachers employed full-time by a Tennessee public school system are eligible for a 25% fee waiver discount of in-state maintenance fee. The student must be classified as an Undergraduate for Admissions and Registration purposes and under the age of 24. The Fee Waiver Reduction code is 158. The fees are charged to E019101, GL 444100. A form signed by the teacher, principal/superintendent and the student must be submitted each semester. The deadline for the form is the last day of Final Exams for the semester. Forms for previous semesters will not be accepted. In July of 1994, an addendum to this statue added a waiver for dependents of public school teachers who died while employed as a teacher and for students who are using the fee waiver at the time of the parent/teacher’s death.

DEPENDENTS OF SERVICEMENT KILLED IN ACTION, MISSING IN ACTION OR DECLARED PRISONERS OF WAR (TCA 49-7-102)

Eligible dependents under the age of 21 whose parent was killed, died as a direct result of injuries received, or has been officially reported as being either a prisoner of war or missing in action while serving honorably as a member of the armed forces during a qualifying period of armed conflict or was formerly a prisoner of war or missing in action under such circumstances, or the spouse of such veteran, is entitled to a waiver of tuition, maintenance fees, student activity fees and required registration or matriculation fees and shall be admitted without cost to any of the institutions of higher education owned, operated and maintained by the state.
A Veteran’s spouse’s eligibility for the educational assistance terminates 10 years after the death of the veteran from whom the eligibility for benefits derives. If a student qualifies for this educational benefit after the student has paid tuition and fees for a term, there shall be not refund by the institution. To be eligible for this benefit, a dependent child shall be matriculated as a full-time student at a state institution of higher education prior to attaining 21 years of age. Once declared eligible, a dependent child remains eligible until one of the following occurs:

1. Dependent child earns an undergraduate degree or certificate;
2. Dependent child has accumulated 150 semester hours
3. The dependent child has maintained a full-time enrollment of at least 15 semester hours or the equivalent for 10 semesters or the equivalent.

The fees for this program are charged to E019005, GL 443011. The Fee Waiver Reduction code is 161.

UNIVERSITY OF TENNESSEE EMPLOYEES (INCLUDING ROTC) (HR 0330)

All regular UT employees (including ROTC employees assigned to The University of Tennessee) who are appointed at least 50% FTE are eligible for fee waiver assistance. Full-time or part-time employees (50% FTE or greater) may receive a fee waiver of up to 9 hours per semester. Employees do NOT have the option of paying Program & Services (including the Health Services fee), Technology, Transportation or Facilities fees. Course at UT-Online are also covered but the employee must submit a form each semester.

Full-time regular faculty and staff may enroll without payment of fees in up to a maximum of nine (9) semester (quarter) undergraduate or graduate credit hours per term. Law and Vet School fees are not covered by the fee waiver policy. An employee is not eligible for BOTH a fee waiver as a UTK employee and a billing as a UHS (University Health System) employee per Betty Gissell at UHS. Part-time regular faculty and staff working 50 percent time or more, may enroll without payment of fees based upon their percent of effort as follows:

<table>
<thead>
<tr>
<th>Employee Effort</th>
<th>Fee Waiver</th>
</tr>
</thead>
<tbody>
<tr>
<td>50-74 percent</td>
<td>up to 4 hours</td>
</tr>
<tr>
<td>75-99 percent</td>
<td>up to 6 hours</td>
</tr>
<tr>
<td>100 percent</td>
<td>up to 9 hours</td>
</tr>
</tbody>
</table>
Graduate students who are 100% regular employees, receive a full waiver of tuition because full fees are charged at 9 hours. Undergraduate students who take more than 9 hours will pay the difference between the fee waiver and the charges for the courses enrolled. The student’s employment status on the first day of class will determine their eligibility for the semester.

The Fee Waiver Reduction code for UT Staff is 150. Each campus bears the cost of the staff waivers for other budget entities attending their campus. The Knoxville Intra-Campus Fee waiver Cost Center is E019103, GL 422200. The waiver cost for employees of the Knoxville Campus is charged to the Cost Center/WBS element from which the employee is paid with a GL of 422200. Waiver cost for Hospital employees is charged to WBS R170145004, GL 422200. Only employees who are not yet on payroll have to submit a form to receive a fee waiver. Employees register for a course and CSA links to IRIS. A fee waiver is added to the student’s account.

ROTC staff members assigned to The University of Tennessee are eligible for a fee waiver as a staff member. The Fee Waiver Reduction code is 174. The fees are charged to E019103, GL 422200. A list of eligible ROTC employees is obtained from Human Resources each semester.

Graduate School of Medicine Interns are also treated as UT staff for fee waiver purposes. They have to be billed as NPE’s and approved by their campus Budget Director.

BEST AWARDS (OUTSTANDING TEACHERS)

Outstanding teachers receive a certificate good for the waiver of one course. This waiver includes Program and Services, Technology, Transportation and Facility fees. The teacher must present a BEST coupon or letter in order to receive the waiver. The certificate is good for one year and may be used to enroll in one undergraduate or graduate course not to exceed 3 credit hours. Workshop fees, correspondence courses or non-credit courses do not qualify for the fee waiver. The fees are charged to E010112, GL 444100. The Fee Waiver Reduction code is 162.

MULTI-CULTURAL EDUCATION

Students participating in the Governor’s Academy for Teachers in Science and Math and Governor’s Academy in Writing will receive a waiver of fees.

HONORS PROGRAM

Out-of-state students in the Honor’s Program are authorized as Internal NPE’s for the out-of-state tuition. The fees are charged to E019003, GL 43102. The eligibility of the student’s is certified each semester by the Honor’s Program office.

DISABLED AND ELDERLY PERSONS (TCA 49-7-113)
Persons with a permanent, total disability and persons 60 years of age or older, may audit courses without payment of fees. Permanent, total disabled persons or persons 65 year of age or older may enroll in courses for credit for $7 per hour with a maximum charge of $75. The Fee Waiver Reduction code for over 60 years of age is 60. The Fee Waiver Reduction code for over 65 or disabled persons is 65. The student pays the $75 charge.

INTERNATIONAL STUDENT EXCHANGE PROGRAM (ISEP)

ISEP is an exchange program where students from UT go out of the country to other universities. Students from other countries come here to attend classes. The outgoing students pay the ISEP office the tuition they would pay for coursework at UT for the semester. The incoming student’s fees are paid from the ISEP funds paid by the outgoing UT students. If the outgoing student was classified as in-state for fee payment purposes, the incoming international student is treated as an in-state for fee payment purposes. The Fee Waiver Reduction code is “7”. This code removes the out-of-state tuition from the student’s account. It does not adjust the Facility fee to the in-state rate. Some of the student’s have adequate insurance coverage and are exempt from paying the International Insurance fee. The Fee Waiver Reduction code is “1” for the insurance waiver.

RONALD MCNAIR PROGRAM

The Ronald McNair program is a Summer program where all students are treated as in-state students for fee payment purposes. The Fee Waiver Reduction code is “8”. The student’s fees are charged to E019004, GL 443102 as an Internal NPE. A list of the eligible student’s is sent from Dr. Ronald McFadden’s Office each Summer semester.

NOTE: The University is trying to get away from using the Social Security Number as the student’s ID#. Beginning in November 2004, students are assigned a 9 digit student ID# upon their admission to the University. The student’s Social Security Number will be used behind the scenes to pass data from one system to another across campus. If the student’s SSN is not in the Admission’s database, they can go to the Registrar’s Office and have their SSN added to their student record. Payroll based fee waivers cannot be validated unless the SSN is located in both the student system and IRIS.
GLOSSARY OF TERMS

CSA – CENTRAL SERVICES ACCOUNTING: This is the VolXpress student fee system. All fee charges are assessed through CSA and several campus units use this system to assess fees and fines.

COST DISTRIBUTION BY POSITION: This IRIS PA20 screen contains employee name, personnel number, EE group, Active/Withdrawn indicator, position name, Cost Center or WBS element, Effort percent FTE, distribution begin date, etc. The overview screen has all distributions with Start and End dates. Click on the distribution for appropriate time period and click magnifying glass to display details.

GRADUATE WAIVER SCREEN: This is an update screen used by departments to enter fee waiver data for graduate students—Graduate Research Assistants, Graduate Teaching Assistants, Graduate Assistants and Graduate Teaching Associates. This data is used by CSA to credit fee waiver payments to student accounts. This screen is used to add a “pending” waiver to a student’s account before their paperwork is processed in IRIS. This screen also allows a department to designate which position/distribution Cost Center or WBS element is used by CSA to process fees.

DISPLAY DATE SPECIFICATION ON PA20 IN IRIS: Information on hire date, leave of absence dates and termination or retirement date.
**DUAL POSITIONS:** A GA, GTA, GTAssoc or GRA must be appointed a minimum of 25% time FTE in order to receive a fee waiver for the term. If the student is paid from a budget entity other than “01”, in-state tuition will be charged to the student’s cost distribution fund. If the student is on a budget entity “01” and the cost center has a benefits flag of “1” (benefits self-funded) or any WBS element, the in-state tuition is charged to the student’s cost distributions. If the student is on a budget entity “01” and the cost center has a staff benefits flag of “2” (benefits centrally funded), the in-state fees are charged to the Central pool account. The out-of-state tuition in all instances is charged to the Central pool account, E019005, GL code 444100.

**EE GROUP:** Regular, Term or Student. To receive a staff waiver a student must be classified as a REGULAR employee. This is an employee who receives full benefits as an employee of the University. A TERM employee or FRIEND of the University does not receive benefits. A STUDENT employee is a student working at the University while attending school. GA’s, GTA’s, GTAssoc’s and GRA’s are student employees.

**EMPLOYMENT VERIFICATION MEMO:** Form issued to an F-1 International student so that they may apply for a social security number. The instructions are given to the student to take to their department by the International Office during Orientation. Instructions and sample form can be found at: [http://web.utk.edu/~globe/students/forms.php](http://web.utk.edu/~globe/students/forms.php).

**FTE % (FULL-TIME EQUIVALENT) FOR APPOINTMENT:** To calculate the appointment FTE % multiply the Effort FTE % X Employment FTE %. The FTE is taken from the Organizational Assignment screen on PA20 in IRIS. This data is sent to a DB2 file to be used by CSA. The IRIS DB2 employment file is refreshed every morning.

**GA – GRADUATE ASSISTANT:** A graduate assistantship is a student appointment. The student performs various duties other than those related directly to teaching or research. In return the student receives a monthly stipend and waiver of fees if the appointment is at least 25% FTE. If the student is on a payroll distribution other than budget entity “01”, in-state tuition is charged to the student’s cost distribution fund. If on a budget entity “01” payroll distribution and the cost center has a staff benefits flag of “1” or any WBS element, the in-state tuition is charged to the cost distributions. If the student is on a budget entity “01” and the cost center has a staff benefits flag of “2”, the in-state tuition is charged to the Central Pool Account-E019005. The Out-of-State tuition in each instance is charged to the Central Pool Account. The IRIS job object code for a GA is 30000239. The Fee Waiver Reduction code is 151. The student must be in an active pay status in order to receive a Summer Semester fee waiver. Changes are effective Fall 2004.

**GRA – GRADUATE RESEARCH ASSISTANT:** A graduate research assistant is a student appointment. The student assists a faculty member with research and performs other duties as assigned by the department in which he is employed. In return the student receives a monthly stipend and waiver of fees if the appointment is at least 25% FTE. If the student is on a payroll distribution other than budget entity “01”, in-state tuition is charged to the student’s cost distribution fund. If on a budget entity “01” payroll distribution and the cost center has a staff benefits flag of “1” or any WBS element, the in-state tuition is charged to the cost distributions. If the student is on a budget entity “01” and the cost center has a staff benefits flag of “2”, the in-
state tuition is charged to the Central Pool Account-E019005. Out-of-state fees, when applicable, are charged to the Knoxville Campus Central Waiver pool Cost Center, E019004, GL 444100. A GRA must be on IRIS during the minimum appointment period in order for his fees to be charged to the grant Cost Center or WBS Element every semester enrolled. The IRIS Job Object Code for a valid GRA appointment is 30000240. The Fee Waiver Reduction code is 154. Changes are effective Fall 2004.

GRADUATE ASSISTANTSHIP VERIFICATION FORM: This form is to be used when an international student (F-1 Visa Category) has been admitted to The University and has been awarded an assistantship. This form does not replace the official letter that students must have in order to apply for a visa. Students are advised by the International Office that they must apply for a social security number at this time. The form can be found on-line at: http://web.utk.edu/~globe/students/forms.php.

GTA – GRADUATE TEACHING ASSISTANT: A graduate teaching assistantship is a student appointment. The student works under the direct supervision of a regular faculty member in activities such as helping to prepare lectures, teaching discussion sections, conducting laboratory exercises, grading papers and keeping class records. In return the student is paid a monthly stipend and receives waiver of fees if the appointment is at least 25% time FTE. If the student is on a payroll distribution other than budget entity “01”, in-state tuition is charged to the student’s cost distribution fund. If on a budget entity “01” payroll distribution and the cost center has a staff benefits flag of “1” or any WBS element, the in-state tuition is charged to the cost distributions. If the student is on a budget entity “01” and the cost center has a staff benefits flag of “2”, the in-state tuition is charged to the Central Pool Account-E019005. The Out-of-State tuition in each instance is charged to the Central Pool Account. The IRIS Job Object Code for a valid GTA is 30000241. The Fee Waiver Reduction code is 152. The student must be in an active pay status in order to receive a Summer fee waiver. Changes are effective Fall 2004.

GTAssoc – GRADUATE TEACHING ASSOCIATE: A graduate teaching associate is a student appointment. An exceptionally experienced graduate student may be assigned primary responsibility for teaching undergraduate courses including the assignment of final grades. If the student is on a payroll distribution other than budget entity “01”, in-state tuition is charged to the student’s cost distribution fund. If on a budget entity “01” payroll distribution and the cost center has a staff benefits flag of “1” or any WBS element, the in-state tuition is charged to the cost distributions. If the student is on a budget entity “01” and the cost center has a staff benefits flag of “2”, the in-state tuition is charged to the Central Pool Account-E019005. The Out-of-State tuition in each instance is charged to the Central Pool Account. The IRIS Job Object Code for a valid TA is 30000242. The Fee Waiver Reduction code is 153. The student must be in an active pay status to receive a fee waiver for the Summer semester. Changes effective Fall 2004.

IRIS – INTEGRATED R3 INFORMATION SYSTEM: Project IRIS is the Financial and Human Resource informational database system used by the University of Tennessee. All financial and payroll information flows through IRIS. CSA updates payroll based fee waivers against an IRIS DB2 file. CSA sends electronic transfer vouchers (ZE documents) to various ledger accounts every month for income and expenses generated through CSA.
IRIS PA20: Human Resource Master Data; Personal Data, Organizational Data, Benefits, Payroll, Time, Tax, etc. tabs offer a variety of employment information on University employees. The Organizational Data tab includes Org. Assignment, Cost Distribution by Position and Date Specifications. The IRIS DB2 table used by CSA takes the info from this PA20 tab.

MEDICAL RESIDENT: The IRIS Job Object Code for a valid Medical Resident is 30000336. (Per Human Resources, a Medical Resident is to be treated as Regular Staff with full fee waiver benefits for both himself and any spouse/dependents.) Medical Resident’s are no longer automatically treated as staff. They must be approved by the Fiscal Budget Office of their campus. They are treated as internal NPE’s.

MINIMUM APPOINTMENT PERIOD FOR GA’S, GTA’S, GTAssoc’S AND GRA’S: Each term a student is required to be appointed on payroll for a specified period of time in order to receive a fee waiver as a GA, GTA, GTAssoc or GRA for the term. The student must be appointed for the entire period to receive a full semester fee waiver. If the student is appointed for any period of the minimum appointment period, he will receive a pro-rated waiver.

<table>
<thead>
<tr>
<th>Term</th>
<th>Start Date</th>
<th>End Date</th>
<th>Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall Term</td>
<td>9/1 to 11/30</td>
<td>91 days</td>
<td></td>
</tr>
<tr>
<td>Spring Term</td>
<td>2/1 to 4/30</td>
<td>89 days</td>
<td></td>
</tr>
<tr>
<td>Summer Term-Full Session</td>
<td>6/15 to 7/31</td>
<td>47 days</td>
<td></td>
</tr>
<tr>
<td>First Session Only</td>
<td>6/15 to 6/30</td>
<td>16 days</td>
<td></td>
</tr>
<tr>
<td>Second Session Only</td>
<td>7/1 to 7/31</td>
<td>31 days</td>
<td></td>
</tr>
</tbody>
</table>

NAME SEARCH: On most CSA screens you can perform a name search function if you do not have the student’s ID#. Go to the name field and type the last name, space, first name and press “F12”. This will bring you to a listing of students with that name. Type an “S” in the Select field beside your choice and press enter. This will bring the ID# back to your screen.

NON-PERSON ENTITY (NPE): CSA system used to authorize trainees, fellows, athletic scholarships, fee exceptions and medical post doc students for the transfer of fee payment between departments. Department must authorize the student on NPE authorization screen. The Departmental Waiver screen cannot be used for this purpose. An electronic transfer voucher (ZE) document is processed through CSA and posted to IRIS at month-end. CSA charges the authorized Fund, Cost Center or WBS Element and credits CSA.

ORGANIZATIONAL ASSIGNMENT: The Organizational Assignment tab on PA20 in IRIS contains information on Primary appointment, EE Group, FTE percentage, Job Key, Cost Center or WBS element, etc. If multiple appointments, see the next and/or previous record tabs at top. There is also a tab for Organizational Structure.

PAYROLL DISTRIBUTIONS: Any employee can be paid from more than one Cost Center or WBS Element. If a GA, GTA, GTAssoc, or GRA is paid from more than one Cost Center or WBS element during the minimum appointment period, his fees can be pro-rated between the Cost Centers or WBS Elements for the term. If the department chooses they can designate one or more of the Cost Centers or WBS Elements to be charged for fees. They would designate the Cost Center or WBS to charge via the Graduate Waiver Screen in CSA. Staff fee waivers are
charged back to departments based on payroll distribution accounts as of the first day of class. Spouse/Dependent waivers are also charged back to departments based on the employee’s payroll distributions as of the first day of class. If an employee is paid from only WBS elements, the spouse/dependent waivers are charged to a Knoxville Intra-Campus Fee waiver pool account.

**PERSONAL DATA FORM:** This form is used to add the social security number to a student’s file in IRIS. This form is to be completed and sent through HR along with a copy of the student’s ssn card and a new W-4. It can be found on the IRIS website under Paper Forms at http://iris.tennessee.edu/.

**PERSONNEL INFORMATION FORM (PIF):** The PIF is completed by personnel in the department in which a person is employed. The PIF must be approved by authorized University Personnel before an employee can be added to IRIS.

**PRO-RATA WAIVER/CHARGE:** Student employees who hold a valid position for any portion of the minimum appointment period are eligible for a pro-rata fee waiver. The waiver/charge will be calculated by using the number of days on payroll during the minimum appointment period divided by the number of days in the minimum appointment period. This percentage is then multiplied by the student’s in-state and out-of-state (if applicable) fees for the term. For example, a student begins his GRA appointment on 10/1 and is appointed through 11/30 (61 days). The minimum appointment period for Fall term is 9/1 through 11/30 (91 days). The student has 9 hours in-state ($2357). The charge to the student’s Cost Center or WBS element would be 61/91 X $2357 or $1579.96 rounded to $1580.

**STUDENT ID#:** A 9 digit number assigned to the student upon their admission to The University of Tennessee. If you enter the student’s ssn into CSA, it will be replaced with the Student ID# as long as the ssn is also in the student’s record. If the student’s ssn was unavailable from the Admissions file, they can go to the Registrar’s Office and have the ssn added to their file.

**VALIDATION DATE:** Approximately 40-45 days into the term, the payroll based fee waiver payments on CSA are checked against the IRIS DB2 file to insure that the fee waiver is correct. The re-calc validation checks for appropriate distributions, minimum appointment period for GA’s, GTA’s, GTAssoc’s and GRA’s. If CSA and IRIS do not match, the fee waiver credit will be reversed and the charges revert back to the student. Staff and spouse/dependent waivers are checked for eligibility on the first day of class. After the end of the minimum appointment period, the system will not adjust any fee waivers. You must contact the Bursar’s Office to process a fee waiver manually after the end of the minimum appointment period for the term.

**WITHDRAWN STATUS ON PA20:** Terminated employee. Go to Date Specifications to see date of termination.
49-7-113. Disabled and elderly persons — Auditing or enrollment. —

(a) (1) Disabled persons suffering from a permanent total disability which totally incapacitates such person from working at an occupation which brings the person an income, and persons who have retired from state service with thirty (30) or more years of service, regardless of age, or persons who will become sixty (60) years of age or older during the academic quarter or semester, whichever is applicable, in which such persons begin classes and, who are domiciled in Tennessee, may audit courses at any state-supported college or university without paying tuition charges, maintenance fees, student activity fees or registration fees; however, this privilege may be limited or denied by the college or university on an individual classroom basis according to space availability.

(2) The provisions of this section shall not apply at medical schools, dental or pharmacy schools, and no institution of higher education shall be required to make physical alterations of its buildings or other facilities to comply with this section.

(3) Prior to admittance, the university or college involved may require an affidavit or certificate from a physician or an agency charged with compensating the disabled person or adjudicating the permanent total disability of the person who is requesting admittance to classes, that such person is permanently totally disabled as set forth herein.

(4) A student who is receiving services under federal or state vocational rehabilitation programs is not eligible for a waiver of tuition and fee benefits under this section.

(b) Subject to the same terms and conditions as provided in subsection (a), disabled persons, as defined in subsection (a), and persons who will become sixty-five (65) years of age or older during the academic quarter or semester, whichever is applicable, in which such persons begin classes and, who are domiciled in Tennessee, may be enrolled in courses for credit at state-supported colleges and universities without payment of tuition charges, maintenance fees, student activity fees or registration fees, except that the board of trustees of the University of Tennessee and the board of regents of the state
university and community college system may provide for a service fee which may be charged by the institutions under their respective jurisdictions, the fee to be for the purpose of helping to defray the cost of keeping the records of such students and not to exceed forty-five dollars ($45.00) a quarter or seventy dollars ($70.00) a semester.