Recipient Obligations Statement

Graduate Merit-Based Financial Aid

Academic Year 2016-2017

Graduate School of Arts and Sciences

Revised April 7, 2016

Previously published versions of the Recipient Obligations Statement are superseded by this document.
INTRODUCTION

Congratulations on being offered a Georgetown University Graduate School merit-based financial aid award. The primary purpose of these financial support offers is to assist graduate students in the pursuit of their academic careers and the timely completion of their Graduate School degrees. Awards are provided on a semester-to-semester or year-to-year basis. Awards may be renewed, subject to departmental recommendation and continued satisfactory progress toward the Graduate School degree, up to the maximum time limits for support set by each department and by the Graduate School. Reviews of all merit-based financial aid awards are conducted annually.

This award carries with it several obligations, which are described below. You must read the following documentation:

1. This document, which is the Recipient Obligations Statement. It is also posted on our website at http://grad.georgetown.edu/financial-support/merit-based-financial-aid/financial-aid-policies-procedures/
2. The Graduate Bulletin: http://grad.georgetown.edu/academics/policies/
4. Georgetown University’s Student Affairs policies: http://studentaffairs.georgetown.edu/policies/.

To accept your award, complete the following steps:

1. Review your award letter
2. Initial in the indicated areas to confirm that you have read the required materials
3. Sign and date the bottom of your award letter
4. Make a copy of your signed award letter and keep it for your records
5. Return your signed award letter to the Graduate School by the deadline indicated on your award letter

If you do not respond by the deadline, the offer will be rescinded.
Information on any changes in the policies, procedures or requirements associated with merit-based Graduate School financial aid awards will be distributed to all graduate departments and programs and will be posted on the Graduate School’s website, http://grad.georgetown.edu/financial-support and its related subpages. It is your responsibility to remain aware of any changes in these policies and procedures. If you have any questions, please contact Ms. Harsimrat (Simmer) Grewal in the Graduate School at gradfinaid@georgetown.edu.

**TYPES OF MERIT AWARDS AVAILABLE**

Scholarship and fellowship (non-service stipend) awards are generally available for both Master’s and Ph.D. students. PhD students are expected to serve their respective graduate departments to receive the requisite research and teaching experience to fulfill their degree requirements. As such, PhD students may receive assistantship (service stipend) awards. Master’s students may be appointed on hourly paid student positions on campus and will be required to submit time-sheets to his/her respective departmental GMS time-keeper to be paid in a timely manner. Master’s students who fail to submit time-sheets to the GMS time-keeper by the required payroll deadlines will not be paid on time. As a condition of these awards, students must make satisfactory progress towards their Graduate School degree, as determined by the academic programs and the Graduate School. Review the tables below for information about the types of awards available.

*Types of Merit Awards*

<table>
<thead>
<tr>
<th>Award Type</th>
<th>Definition</th>
<th>Distribution Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scholarship</td>
<td>Partial or full award to cover coursework required for your degree</td>
<td>Paid directly to the Office of Billing and Payment Services</td>
</tr>
<tr>
<td></td>
<td>*Does not cover student fees</td>
<td></td>
</tr>
<tr>
<td>Ph.D. Assistantship Stipend</td>
<td>Stipend awarded for service for Ph.D. students</td>
<td>Paid directly to the student</td>
</tr>
</tbody>
</table>
| Fellowship Stipend       | Stipend with no service obligation                                         | **Effective January 2, 2015, Ph.D. fellowship stipends will be paid direct to the Office of Billing and Payment Services.  
*Master’s fellowship stipends will be paid directly to the student** |

*Duration of Awards*

<table>
<thead>
<tr>
<th>Student Type / Matriculation</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ph.D. Student -</td>
<td>5-Year Commitment</td>
</tr>
<tr>
<td>Matriculated with full Graduate School merit scholarship AND stipend package</td>
<td>Student is offered five (5) consecutive years of scholarship + stipend from point of matriculation into the Ph.D. program, counted continuously.</td>
</tr>
<tr>
<td>Ph.D. Student –</td>
<td>Offers are made semester to semester, or year to year</td>
</tr>
<tr>
<td>Matriculated with no merit package</td>
<td>Student is eligible for Graduate School funding during the first five years of their study, counted continuously from point of matriculation into the Ph.D. program, although awards are not guaranteed</td>
</tr>
<tr>
<td>Master’s Student</td>
<td>Offers are made year to year, or semester to semester</td>
</tr>
</tbody>
</table>
Funding eligibility, similar to time-to-degree, is calculated continuously from the point of matriculation. For Ph.D. students, this means that they are eligible for Graduate School support through the fifth year of study. Certain leaves of absence, declining funds with no competitive external award, the use of faculty grants, and other similar instances do not qualify students for funding eligibility extensions. Should you have a question about your funding eligibility, please contact the Graduate School at gradfinaid@georgetown.edu.

This information is also posted on our website at http://grad.georgetown.edu/financial-support.

GRADUATE SCHOOL SCHOLARSHIP AWARDS

Graduate School Scholarship awards are offered for students in many academic programs. Master’s and Ph.D. students receiving scholarship-only awards may have a portion or all of their tuition covered in a given semester or year. When a Ph.D. student receives a stipend award from Georgetown University, the scholarship covers the full tuition for courses pertaining to their degree program for the duration of the stipend award, as well as a credit to cover the fee for their individual student Georgetown University Health Insurance.

Graduate School Scholarship awards only cover tuition charges for coursework to be applied toward your degree program. These awards do not cover academic fees, mandatory student fees or non-mandatory student fees (e.g. the Yates Field House fee, the Health Insurance fee, lab fees, language fees, technology fees, student activities fee, etc.). They also do not cover courses from which you withdraw.

Withdrawal from Courses

Courses from which you withdraw do not apply towards your degree. Therefore, if you withdraw from a course, the entire scholarship for that course will be taken away. Any prorated tuition charges assessed for a course from which you withdraw will be your responsibility. Below is a scenario to depict what happens when you withdraw from a course. Please note that the withdrawal schedule used in this scenario is based on the University Registrar’s withdrawal schedule for the 2015-2016 academic year.

Scenario: You register for a course worth 3 credits. You decide to withdraw from the course.

Given: The Registrar has a refund schedule posted at: http://registrar.georgetown.edu/registration/tuition/main-campus.

Depending on when you withdraw from a course, only a certain percentage of the cost of the course will be taken off your student account. That percentage decreases as the semester progresses.

**Example using 2015-2016 tuition rates (3 credits = $5,589):**

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Amount on Student Account</th>
</tr>
</thead>
<tbody>
<tr>
<td>Register for a 3 credit course</td>
<td>$ 5,589</td>
</tr>
<tr>
<td>Amount of scholarship</td>
<td>$ 5,589</td>
</tr>
</tbody>
</table>

| Here is the cost to you after withdrawing from the course: |
|-----------------|-----------------|
| Refund Rate     | Amount on Student Account (Amount you must pay) |
| Scholarship after Withdrawal (at any point)     | $ 0 - no credit |
| Withdraw during Add/Drop                        | $ 0 - no charge |
| Withdraw during 3rd - 4th week                  | $ 1,117.80 charge |
| Withdraw during 5th - 6th week                  | $ 1,676.20 charge |
| Withdraw during 7th - 8th week                  | $ 2,794.50 charge |
| Withdraw in 9th week                            | $ 3,353.40 charge |
| Withdraw after 9th week                         | $ 5,589.00 charge |
The same policies and procedures apply each semester. Check the University Registrar’s website for updates regarding the refund rate and schedule. **Plan your course registration carefully and communicate with your program early about your registration plans.**

**Other Limitations**

*All award recipients must make satisfactory progress toward their graduate degree, as determined by their academic program and the Graduate School.*

Failure to maintain satisfactory degree progress or violations of academic integrity may result in termination of your award and retroactive revocation of the entire Graduate School Scholarship award for the current semester. In addition, Ph.D. students are required to be enrolled full-time as a condition of their scholarship award. Master’s programs vary in the number of credits required for the scholarship award, so master’s students must verify with their program the level of enrollment required as a condition of the scholarship award.

**Graduate School Scholarships do not cover courses retaken to fulfill degree requirements.**

If you did not receive a passing grade for a required course and, therefore, had to retake that course, you would not receive a Graduate School Scholarship for that course again. The cost of retaking that course would be your responsibility.

**Students are not permitted to take a refund on scholarship awards.**

If your tuition (the cost of your coursework) is less than the scholarship awarded, the excess funds will revert back to Georgetown University. Should you receive a refund as a result of unused scholarship funds from your student account, you agree to notify your academic program and the Graduate School and return the funds to Georgetown University immediately. If you do not return the funds, you will be billed for them via your student account; late fees and service charges associated with that amount will also be your responsibility.

**Scholarship recipients are not permitted to provide any service as a condition of the scholarship award.**

If service is expected, your academic program must contact the Graduate School to arrange for the appropriate portion of the award to be administered as either a Ph.D. assistantship stipend for Ph.D. students only or an hourly student appointment for Master’s students, with appropriate tax withholding. Please read the section “Graduate School Ph.D. Assistantship Awards” for more information.

**International students may have additional requirements.**

If you are an international student, you should read the section of this document titled “Important Tax and Immigration Information.” You should also talk with the Office of Global Services about the enrollment requirements related to your visa status. In addition, you must contact Lawrence Smith in the Tax Department for information regarding additional tax obligations that may be associated with your award. You might also need to consult a personal tax advisor.

**Talk with your program if you have questions about unused portions of a scholarship award.**

Graduate School Scholarship awards are usually divided between semesters of the academic year. Unused portions of a scholarship provided for the fall semester can be applied only towards the following spring semester, with the explicit approval of your academic program and the Graduate School; it cannot be applied to semesters beyond that spring semester or to past semesters. Unused portions of a spring semester scholarship cannot be applied toward any past or future semesters. This stipulation applies both to scholarship-only awards and to the scholarship component of an assistantship or fellowship award.

For example, suppose you were awarded 12 credit hours of scholarship support for the fall semester and no scholarship support for the following spring semester. If you register for only 9 credits in the fall semester, you may request through your academic program that the remaining 3 credits of scholarship support be carried over to the following spring semester. If approved by both your program and the Graduate School, the 3 credits of scholarship will be credited to your account for spring semester. However, if you are awarded 12 credits of scholarship for the spring semester and register for only 9 credits,
the 3 credits of unused scholarship will revert back to Georgetown University; you will not be permitted to apply the credits to either preceding semesters or to future semesters.

The Office of Billing and Payment Services provides general tax information, including notes about Form 1098T, that might be related to scholarship awards on their website at: http://studentaccounts.georgetown.edu/

**GRADUATE SCHOOL PH.D. ASSISTANTSHIP AWARDS**

Graduate School Ph.D. assistantship stipends are merit-based stipends provided in return for service. They are also referred to as “service stipends.” Ph.D. students may be appointed as a Ph.D. Graduate Research Assistant, Ph.D. Graduate Teaching Assistant or Ph.D. Teaching Associate. These assistantship stipends are available only for Ph.D. students. PhD students may be provided a Graduate School Ph.D. assistantship for a full academic year or for a single semester. PhD students receiving a Graduate School Ph.D. assistantship stipend in one semester of an academic year may be given a Graduate School Fellowship stipend the other semester.

The table below describes the details of assistantship awards. Specific duties are assigned by the individual academic programs.

<table>
<thead>
<tr>
<th>Student Type</th>
<th>Duration of Appointments</th>
<th>Rate of Pay</th>
<th>Scholarship provided?</th>
<th>Hours per week</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ph.D. Student</td>
<td>Fall-only: September – December</td>
<td>$13,500 / semester; $27,000 / academic year</td>
<td>Yes</td>
<td>15 hours per week (Same for all Ph.D. service stipends)</td>
</tr>
<tr>
<td></td>
<td>Spring-only: January – Mid May</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Full Year: September – Mid May</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Ph.D. assistantship awards are generally not available in the summer, unless individual departments or programs offer them independently. Summer service stipends do not have a standard rate of pay for Ph.D students. Contact your academic program if you have questions regarding possible summer opportunities. *Ph.D. students who complete their studies earlier than anticipated or elect to take a personal, medical, or parental leave of absence may have their stipends prorated to the last day of service provided to the Department.*

**Assistantship stipend payments will be distributed on a biweekly basis between September and mid May:**

<table>
<thead>
<tr>
<th>Duration of Appointment</th>
<th>Payment Months</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Year</td>
<td>September, October, November, December, January, February, March, April, mid-May</td>
</tr>
<tr>
<td>Fall-only</td>
<td>September, October, November, December</td>
</tr>
<tr>
<td>Spring-only</td>
<td>January, February, March, April, mid-May</td>
</tr>
<tr>
<td>Summer (if a Department elects to provide funding)</td>
<td>May, June, July, August</td>
</tr>
</tbody>
</table>

**Taxes and IDs**

General tax information regarding Ph.D. assistantships is available at this website: https://sites.google.com/a/georgetown.edu/tax/.

You should also read the “Important Tax and Immigration Information” section of this document.
All Ph.D. assistantship recipients must have a valid U.S. Social Security number. Individuals who do not have a U.S. Social Security number must apply for one through any Social Security Administration office; international students must apply after they have entered the United States. For specific information on obtaining a social security number, please see the website provided by the Office of Global Services: http://internationalservices.georgetown.edu/arrival/.

International students must meet with Lawrence Smith in the Tax Department to complete all necessary tax forms. Review this website to prepare for the meeting: https://sites.google.com/a/georgetown.edu/tax/.

Georgetown University reports Ph.D. assistantship payments to both the recipient and to the United States Internal Revenue Service (IRS) as taxable income. The Payroll Office distributes W-2s directly to the student.

If you have any other general questions regarding taxes, contact the Tax Department at 202-687-5448. Consult a personal tax advisor if you require detailed guidance.

Paperwork

All students must complete the following paperwork with their academic program or department of hire or the HR Office for graduate students on Main Campus when starting assistantship for the first time (and if they have not worked at Georgetown University recently):

- **Form I-9 with a valid social security number** (bring required identification and documentation to the HR Office in Healy Hall). If you are an international student and have applied for a social security number please contact the HR Office (for graduate students on Main Campus) once you have received your social security number in order to have the information updated accordingly in the Georgetown Management System for accurate and timely generation of W-2 forms.
- **Federal Tax Form W-4** (to be completed electronically by the student via self-service in the Georgetown Management System or GMS)
- **State Tax Form** to be completed at the HR office in Healy Hall for graduate students on Main Campus
- **Direct Deposit** (to be completed electronically by the student via self-service in the Georgetown Management System or GMS)

These forms can be found on the Student Employment website: https://seo.georgetown.edu/Cmx_Content.aspx?cpId=17.

If you have already completed these documents and were recently employed at Georgetown University, you might not need to complete these forms again. However, students whose I-9 documentation has expired may be required to complete the Form I-9 again. Your academic program (or department of hire) will contact you should you need to complete any mandatory forms. International students should meet with the Tax Department to complete their tax forms. Contact the Graduate School at gradfinaid@georgetown.edu if you have any questions.

Other Limitations

All recipients must make satisfactory progress toward their graduate degree, as determined by their academic program and the Graduate School.

Failure to maintain satisfactory degree progress or violations of academic integrity may result in termination of your award and retroactive revocation of the entire Graduate School Scholarship portion of the award for the current semester. In addition, Ph.D. students are required to be enrolled full-time as a condition of their assistantship award.

Ph.D. Assistantship recipients may only serve or work a combined total of 20 hours per week during the academic year.

Immigration law restricts international students to a combined total of 20 hours of service per week without exception, so international students are advised to monitor their hours carefully. However, all graduate students, regardless of citizenship status, are limited to a combined total of 20 hours of service per week while on assistantship during the academic year while classes are in session.

Ph.D. assistantships occupy 15 hours per week. Master’s students on hourly student appointments on campus must monitor their hours so as to not surpass the 20-hour per week limit.
The Graduate School is required to correct any errors in payment when they are found.

The Graduate School is required to correct any errors when they are found. In the event you receive or miss a stipend payment in error (e.g., a double payment, a payment during a semester in which you were not awarded stipend, an incorrect payment amount, a missed payment, etc.) you agree to notify your program administrator and the Graduate School immediately. You must return excess payments to Georgetown University immediately.

Any unused portion of an assistantship award will revert back to Georgetown University.

Graduate School Assistantship awards provided to Ph.D. students include a scholarship component during the period of award.

Graduate School Assistantship awards provided to Ph.D. students include a scholarship component to cover coursework required for their degree program during the period of award. Ph.D. students appointed as Teaching Associates who have already completed all coursework for their degree will be enrolled in a specific registration category under thesis research that charges no tuition. As a result, no scholarship will be needed for the duration of that appointment.

This information is also posted on our website at [http://grad.georgetown.edu/financial-support/merit-based-financial-aid/assistantships/](http://grad.georgetown.edu/financial-support/merit-based-financial-aid/assistantships/)

**GRADUATE SCHOOL FELLOWSHIP AWARDS**

Graduate School Fellowship stipends are merit-based stipends provided without a service obligation. They are also referred to as "non-service stipends." These fellowship stipends are generally available only for Ph.D. students, although some master's programs offer fellowship stipends as well. Students may be provided a Graduate School Fellowship for a full academic year or for a single semester. Ph.D. students receiving a Graduate School Fellowship in one semester of an academic year may be appointed to a Graduate School Assistantship the other semester.

The table below describes the kinds of fellowship awards available.

<table>
<thead>
<tr>
<th>Student Type</th>
<th>Duration of Award</th>
<th>Rate of Pay</th>
<th>Scholarship Provided?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ph.D. Student</td>
<td>Fall-only: September – December</td>
<td>$13,500 / semester; $27,000 / academic year</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Spring-only: January – April</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Full Year: September – April</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Master's Student</td>
<td>Fall-only: September – December</td>
<td>No standard rate</td>
<td>Varies by program.</td>
</tr>
<tr>
<td></td>
<td>Spring-only: January – April</td>
<td>Generally ranges from $5,000 to $18,000 / academic year</td>
<td>Some programs offer fellowship stipend-only awards.</td>
</tr>
<tr>
<td></td>
<td>Full Year: September – April</td>
<td>Rate may be higher or lower in some cases</td>
<td>Other programs offer a partial or full scholarship component.</td>
</tr>
</tbody>
</table>

The Graduate School disburses the Ph.D. fellowship stipend award directly to students' accounts; to receive payment of their fellowship stipend, students must request a refund (via MyAccess) of the credit balance created by this disbursement. Disbursement typically occurs 10 days before the first day of classes for a semester, except for the Spring semester, when it typically occurs by January 2nd. The Office of Student Billing & Payment Services (OSBPS) reviews and processes all refund requests within three business days of the request. If a student has unpaid tuition and fees on his/her account, the refund payment will be reduced by that amount. Students may elect to receive the refund via direct deposit; if a direct deposit refund profile is not established, a paper check will be mailed to the student's local address. For instructions on how to request a refund and set up a direct deposit refund profile, please visit the Office of Billing and Payment Services' website at [http://studentaccounts.georgetown.edu/faq/](http://studentaccounts.georgetown.edu/faq/).
Fellowship stipends for Master’s students are paid directly to the student in one lump sum on the last business day of the month of August for fall semester fellowship stipend awards and on the last business day of the month of January for spring semester fellowship stipends.

**Taxes, IDs and Paperwork**

Information on tax obligations for non-service stipends is available on the Tax Department’s website: [https://sites.google.com/a/georgetown.edu/tax](https://sites.google.com/a/georgetown.edu/tax). Tax reporting for U.S. citizens and permanent residents is handled differently than tax reporting for international students.

U.S. Citizens and Permanent Residents—

Georgetown University does not report fellowship stipends for U.S. citizens or permanent residents to the United States Internal Revenue Service. Therefore, no W-2 or other document will be distributed for non-service stipend awards. The only records you will have of the award are your Graduate School award letter and your bank statement. Please keep those for your reference. As noted above, the Tax Department provides general information about reporting non-service stipends. If you need additional guidance, please consult a personal tax advisor.

International Students—

Georgetown University may be required to report fellowship stipends for international students to the Internal Revenue Service. International students are required to meet with the Tax Department to complete all necessary tax paperwork.

International students may also be required to obtain either a U.S. Social Security Number or IRS Individual Taxpayer ID number. Check with the Office of Global Services and the Tax Department for specific guidance.

Direct deposit is available for international students receiving fellowship (non-service) stipend.

**Other Limitations**

*All recipients must make satisfactory progress toward their graduate degree, as determined by their academic program and the Graduate School.*

Failure to maintain satisfactory degree progress or violations of academic integrity may result in termination of your award and retroactive revocation of the entire Graduate School Scholarship portion of the award for the current semester. In addition, Ph.D. students are required to be enrolled full-time as a condition of their fellowship award. Master’s programs vary in the number of credits required for the fellowship award, so master’s students must verify with their program regarding the level of enrollment required as a condition of the award.

***Fellowship recipients may not serve or work at Georgetown University for the duration of their award.***

Fellowship recipients are expected to devote their efforts fully to their studies. Therefore, recipients may not serve or work at Georgetown University for the duration of the fellowship award, during the academic year. Failure to comply with this policy may lead to a revocation of the fellowship stipend award.

The Graduate School is required to correct any errors in payment when they are found.

The Graduate School is required to correct any errors when they are found. In the event you receive or miss a stipend payment in error (e.g. a double payment, a payment during a semester in which you were not awarded stipend, an incorrect payment amount, a missed payment, etc.) you agree to notify your program administrator and the Graduate School immediately. You must return excess payments to Georgetown University immediately.

Any unused portion of a fellowship award will revert back to Georgetown University.

*Graduate School Fellowship awards provided to Ph.D. students include a scholarship component during the period of award.*
Graduate School Fellowship awards provided to Ph.D. students include a scholarship component to cover coursework required for their degree program during the period of award. Master’s fellowships generally do not carry a scholarship component, though some programs might provide a scholarship. Master’s students should contact their programs for additional information. Refer to the section “Graduate School Scholarship Awards” for general policies regarding scholarship awards.

HEALTH INSURANCE FOR GRADUATE STUDENTS

All graduate students who are enrolled full-time are required to have health insurance. A charge for the Georgetown University sponsored plan will automatically be assessed to the student account of graduate students enrolled for 8 or more credit hours or Thesis Research. Graduate students who are already insured under another plan and whose coverage will continue for the entire school year must WAIVE the University insurance in order to have the charge removed from their student account. Health insurance can be accepted or waived online via MyAccess: https://myaccess.georgetown.edu/.

Ph.D. students who are awarded an assistantship or fellowship that provides a full stipend will have the fee for the Georgetown University sponsored individual student plan paid by the Graduate School. In order to be eligible, the Ph.D. student must hold a full Graduate School Assistantship (one in which the student performs 15 hours of service per week) or hold a full non-service Graduate School Fellowship during the fall and/or spring semester. The Graduate School does not pay the individual health insurance fee for Ph.D. students receiving scholarship-only awards. Also, the Graduate School does not pay the individual health insurance fee for master's students. All master's students are responsible for paying the fee themselves.

The funds provided by the Graduate School to eligible Ph.D. students will be used to pay the fee assessed for the Georgetown University sponsored individual student health insurance plan. These funds may be applied to purchase the Georgetown University-sponsored family plan, but any balance remaining after this coverage has been applied is the student’s financial responsibility. The funds cannot be used to purchase any other insurance. If a student waives the Georgetown University sponsored plan, the Graduate School funds will be withdrawn from the student's account. Students are not permitted to take a refund on unused funds that were intended to cover the health insurance fee.

Under the Georgetown University sponsored health insurance plan, covered students have the option of purchasing dependent coverage. The funds provided by the Graduate School, however, will be limited to the cost for coverage of the eligible student alone. While these funds may be applied toward the cost of health insurance coverage for the student's dependents or family, the Graduate School will not provide any additional coverage for these alternative health insurance plans.

Detailed information regarding the Georgetown University Health Insurance plan is available at: http://studentaffairs.georgetown.edu/insurance/. Additional contact information for the Student Health office is available in the “Other Important Resources” section at the end of this document.

IMPORTANT TAX AND IMMIGRATION INFORMATION

Georgetown University’s Tax Department maintains the most accurate and current information concerning tax obligations. Information on reporting can be found on the Tax Department website at: https://sites.google.com/a/georgetown.edu/tax/. Please keep in mind that this information is general. If you require specific personal counsel, you may need to speak with a personal tax advisor.

International students who receive any type of Graduate School Ph.D. Assistantship, Scholarship, or Fellowship award will be required to complete a special set of tax forms before their award can be processed. Some forms only need to be completed once, while others may need to be updated annually. Recipients must contact Lawrence Smith in the Tax Department for specific requirements. His e-mail address is smithl@georgetown.edu and his phone number is 202-687-5448. His office is located at 2121 Wisconsin Avenue on the 4th floor. Please review this website before meeting with him: https://sites.google.com/a/georgetown.edu/tax/.

*International students receiving a Ph.D. assistantship stipend or working in an hourly student capacity will be required to have a valid United States Social Security Number (SSN).* Any individual for whom the University is required to report taxable or non-taxable income to the Internal Revenue Service (IRS) will be required to have a valid United States identification number. This number can be either a valid SSN or an IRS Individual Taxpayer Identification Number (ITIN). The ITIN is suitable only for those individuals who do not already have a SSN and do not have work authorization, therefore precluding them from obtaining a valid SSN. Further information and forms are available from Lawrence Smith of the University’s Tax Department. The Office of Global
Services also posts specific tax information for international students at [http://internationalservices.georgetown.edu/](http://internationalservices.georgetown.edu/), and specific instructions on applying for social security numbers are available at [http://internationalservices.georgetown.edu/students/f-1/employment/oncampus](http://internationalservices.georgetown.edu/students/f-1/employment/oncampus).

International students should note that in some cases a portion of or the entire amount of any award may be subject to mandatory Federal, State, and Employment tax withholding. In addition, international students must hold a visa status that permits them to receive the award. Students holding a valid F-1 or J-1 status sponsored by Georgetown University are eligible for any of the awards offered by the Graduate School. For international students who will not be in a GU-sponsored F-1 or J-1 status, it is important that you contact the Office of Global Services to confirm that you will be eligible to receive the award you have been offered. Awards will not be given to students who are ineligible based on visa status. The Office of Global Services is located at 3520 Prospect Street, NW, Car Barn Suite 210; the telephone number is (202) 687–5867.

**ACCEPTANCE INFORMATION**

Please be sure to carefully review the details of your award for the academic year. Your acceptance not only indicates that you wish to accept the award presented, but that the information accurately reflects the academic plans you have shared with your program. Therefore, it is important that you talk with your program about your academic plans.

In order to ensure that you have received this information and that you understand your obligations as a recipient of a Graduate School PhD Assistantship, Scholarship, or Fellowship, you must initial all indicated areas on your letter, sign it and date it. Keep a copy of your signed letter for your records. Return the signed award letter to the Graduate School. Your award cannot be processed until we have received the signed letter. Please return the signed award letter via e-mail as a PDF document or hand carry. Here is the contact information:

**Email**
gradfinaid@georgetown.edu

**Post**
Georgetown University
Graduate School of Arts & Sciences
Attn: Merit-Based Financial Aid
3520 Prospect Street, NW, Room CB-400
Washington, DC 20057-1005

**Hand Carry**
Car Barn 409 or 423

**Student Responsibilities / Checklists**

There are several important tasks you must complete in order to begin your semester successfully. The following information is **not** a comprehensive list of all tasks you must complete at the university. However, it provides some important guidelines for your merit-based financial aid award.

**Graduate School**

- Where applicable, return your enrollment confirmation form to the Graduate School Admissions Office.
- Where applicable, submit all outstanding transcripts or other admissions materials to the Graduate School.
  - Check your admissions letter to see what items you need to submit and to whom those items should be sent.
- Return your signed merit-based financial aid award letter to the Graduate School Financial Aid Office in Car Barn Suite 400.
- Make sure you have a copy of your signed award letter for your records.

**Registration**

- Meet with your program to discuss your registration plans.
- Register for classes via MyAccess: [https://myaccess.georgetown.edu/](https://myaccess.georgetown.edu/).
- Check your student account after registration.
Student Financial Services

✓ If you are receiving need-based aid through the Office of Student Financial Services, contact your counselor to ensure that you have submitted all the required information and documentation for your need-based aid award to be processed.

  o Please visit the following website to contact your counselor as needed: http://finaid.georgetown.edu/staff-directory/

✓ Make sure your have submitted accurate, up-to-date registration information to Student Financial Services so that your need can be correctly calculated.

Student Accounts

✓ If you are receiving scholarship support, check your account via MyAccess to confirm that it is posted. If your scholarship has not posted, contact your program administrator.
✓ Pay for all other coursework and fees through the Office of Billing and Payment Services. Some fees you should be prepared to pay include:
  o Any coursework not covered by your scholarship
  o Georgetown University Health Insurance
  o Yates Field House (gymnasium)
  o Transcript Fee
  o Language Fee (if applicable, depends on your registration)
  o Technology Fee (if applicable, depends on your program and your registration)
  o Lab Fee (if applicable, depends on your program and your registration)
  o Student Activities Fee
  o Any other fees for which you are responsible

Tuition and fee rates are posted to the Office of Billing and Payment Services website at: http://studentaccounts.georgetown.edu/tuition/

The Office of Billing and Payment Services offers payment plans to students. Please see this website for more information: http://studentaccounts.georgetown.edu/paymentplans/

**Be sure to pay by the deadlines posted to the Office of Billing and Payment Services website.**

Stipend Paperwork

Assistantship / Service Recipients

Assistantship recipients, particularly those receiving assistantship for the first time or who are not currently in the Payroll system, should be prepared to complete the following forms:

- Form I-9 with a valid social security number within the first three days of service to the Department
  - You must meet with GU HR in Healy Hall for Main Campus graduate students. Bring all necessary documentation and identification when you meet with the Main Campus HR representative.
- W-4 Tax Form (online via student employee self-service in Georgetown Management System or GMS)
- State Tax Form
- Direct Deposit (online via student employee self-service in Georgetown Management System or GMS)

These forms are also available at: https://seo.georgetown.edu/Cmx_Content.aspx?cpld=17. Students already active in the GMS Payroll system may not need to complete these forms again. However, if the I-9 documentation has expired, you may need to redo the HR Office for graduate students on the Main Campus. Also, if you have experienced any changes that affect your tax status, you may need to complete a new set of tax forms.

*International students should meet with the Tax Department to complete all necessary tax forms.*
Fellowship / Non-Service Recipients

U.S. Citizens and permanent residents do not need to complete any tax paperwork if receiving non-service stipend.

International students must meet with Lawrence Smith in the Tax Department to complete all the necessary paperwork for their stipends.

OTHER IMPORTANT RESOURCES

External Funding Resources

Information on external funding opportunities is available at: http://grad.georgetown.edu/financial-support/external-fellowships.

Student Financial Services

You may contact the Office of Student Financial Services for more information about financing your education. The staff can assist you with various financial aid options including Federal Financial Aid, Employment Programs, and Supplemental Loans.

Campus Location: Healy Hall G 19
Phone Number: +1 202-687-4547
Fax Number: +1 202-687-6542
Website: General website: http://finaid.georgetown.edu/

Site for Graduate Students: http://finaid.georgetown.edu/manage-your-aid

Office of Billing and Payment Services

The Office of Billing and Payment Services provides the most up-to-date information about charges related to your bill, and the policies and procedures related to managing your student account. If you have questions about the charges on your bill or would like information about available payment plans, you may contact the Office of Billing and Payment Services at:

Campus Location: White-Gravenor Hall G-01
Phone Number: +1 202-687-7100
Fax Number: +1 202-687-1133
Email: studentaccounts@georgetown.edu
Website: http://studentaccounts.georgetown.edu/

University Registrar

The Office of the University Registrar addresses many student needs related to academic affairs. This office can assist with questions regarding transcripts, registration, scheduling, and many other concerns.

Campus Location: White-Gravenor Hall G-01
Student Affairs

The Office of Student Affairs supports student life at Georgetown University. The Graduate Student Guide is a resource specifically developed for graduate students and is available at: https://georgetown.app.box.com/s/uaorh361i48wcfzp9jx.

Campus Location: 530 Leavey Center
Phone Number: +1 202-687-4056
Fax Number: +1 202-687-6255
Website: http://studentaffairs.georgetown.edu/

Student Health Insurance

Student Health Insurance provides the most detailed information about all Georgetown University health insurance plans available for students.

Campus Location: Henle Village 31
Phone Number: +1 202-687-4883
Fax Number: +1 202-687-4955
E-mail Address: shi@georgetown.edu
Website: http://studentaffairs.georgetown.edu/insurance/

Office of Global Services

The Office of Global Services provides important services for international students as well as students looking to study abroad.

Campus Location: Car Barn, Suite 210 – Box 571013
Phone Number: +1 202-687-5867
Website: General- http://globalservices.georgetown.edu/
International Students: http://internationalservices.georgetown.edu/#_ga=1.30885180.20444197.1401284787

Tax Department

The Tax Department provides general information about taxes and may be able to address general questions. However, please keep in mind that you may need to consult a personal tax advisor for additional information and guidance.

Campus Location: 2121 Wisconsin Avenue, 4th Floor
Phone Number: General Questions: +1 202-687-1158 or +1 202-687-5449  
Non-U.S. Citizens: +1 202-687-5448
Fax Number: +1 202-687-2080
E-mail: Non-U.S. citizens should contact Lawrence Smith at smithl@georgetown.edu
Website: https://sites.google.com/a/georgetown.edu/tax/