APPPOINTMENT CHECKLIST FOR GRADUATE STUDENTS

Graduate Assistantship form signed by:
- Student - YOU!!
- Hiring dept - Principal Investigator/ Department Head
- Academic dept - Graduate Program Director (GPD)
- Financial Aid Officer if funded by Federal Work Study

After signatures, submit to Graduate Assistantship Office

Registration - You must register, either for credits or by paying the Program Fee, by the end of "Add/Drop" or your assistantship will be cancelled.
If you enroll for 1-5 credits and wish to be exempt from FICA/OBRA withholdings:
- Submit a Full/Half time Status Enrollment form approved by Graduate Program Director to Graduate Records Office.
If you pay Program Fee:
- No exemption from FICA/OBRA
- Health coverage is not automatic - even if you have an assistantship appointment. You must go to Health Services for enrollment information.
If you enroll for 1-4 credits:
- Health coverage is not automatic - even if you have an assistantship appointment. You must go to University Health Services (UHS) for enrollment information.

If you are receiving a loan from Financial Aid Services and you expect an excess check you must have:
- Registered for 6 or more credits, or if you are taking less than 6 credits or paid Program Fee you must submit to Graduate Records a letter of at least half time status from your Graduate Program Director.
- Have a bill calculated by the Bursar's Office
- Sign and return loan promissory note.

Note: Supplemental Health fee will automatically be deducted from your loan excess check unless you have requested a waiver using the UHS online waiver form.

International students:
- Tax treaty - Non-resident alien students who claim an exemption from taxes based on a U.S. tax treaty, need to file a new Form 8233 each calendar year
- U.S. Social Security Number - Information on how to obtain a SS# is available from the Human Resources Information Center. Non-U.S. Citizens should contact the Foreign Student Office for assistance.

One time unless you need to make changes:
- Participation Agreement (Intellectual Property Policy)

Human Resources: Information Center, 325 Whitmore
- INS Eligibility for Employment in the US form (I-9)
- Personal Data Questionnaire
- Directory Information and Confidentiality form
- Direct deposit
Anyone claiming student exemption from taxes, is required to re-file for that exemption by filling out new tax forms at the beginning of each calendar year.
- Federal tax form (W-4)
- Massachusetts state tax form (M-4)

Other Required Forms:
- Union dues - Graduate Employee Organization (GEO) dues deduction form (attached to Assistantship form)

Important Addresses/Telephone Numbers

Bursar’s Office
215 Whitmore  545-2368

Foreign Student /International Programs Office
467 Hills South  545-2843

Graduate Assistantship Office
517 Goodell Building  545-5287

Graduate Employee Organization
201 Student Union  545-5317

Graduate Financial Aid
243 Whitmore  577-0555

Graduate Records
534 Goodell  545-0024

Human Resources Information Center
325 Whitmore  545-0862

Member Services
University Health Services  577-5192

For detailed information refer to the following web publications - www.umass.edu/gradschool/

♦ Graduate School Handbook and Information Mailings
♦ Graduate Assistantship Policies and Procedures available
♦ Graduate Financial Aid Award Information
♦ Graduate Payroll Information Packet
♦ Graduate Employee Organization contract
♦ University Health Services Supplemental Health Benefits packet

Compiled by GSAAPC
07/20/11