

**Original Approval Date: December 13, 2019**
**Most Recent Approval Date: December 13, 2019**
**Parent Policy: [Student Financial Supports Policy](#)**

## Graduate Student Financial Supports Procedure

<b>Office of Administrative Responsibility:</b>	Faculty of Graduate Studies and Research
<b>Approver:</b>	Graduate Scholarship Advisory Committee
<b>Scope:</b>	<p>Compliance with this University policy extends to all academic, support and excluded staff, postdoctoral fellows, and academic colleagues as outlined and defined in the Recruitment Policy  <a href="https://policiesonline.ualberta.ca/policiesprocedures/policies/recruitment-policy.pdf">https://policiesonline.ualberta.ca/policiesprocedures/policies/recruitment-policy.pdf</a>&gt; (Appendix A  <a href="https://policiesonline.ualberta.ca/PoliciesProcedures/Procedures/Recruitment-Policy-Appendix-A-Definition-and-Categories-of-Academic-Staff-Administrators-and-Colleagues.pdf">https://policiesonline.ualberta.ca/PoliciesProcedures/Procedures/Recruitment-Policy-Appendix-A-Definition-and-Categories-of-Academic-Staff-Administrators-and-Colleagues.pdf</a>&gt;                      and Appendix B  <a href="https://policiesonline.ualberta.ca/policiesprocedures/procedures/recruitment-policy-appendix-b-definition-and-categories-of-support-staff.pdf">https://policiesonline.ualberta.ca/policiesprocedures/procedures/recruitment-policy-appendix-b-definition-and-categories-of-support-staff.pdf</a>&gt;:                      Definitions and Categories); undergraduate, graduate and Faculty of Extension students; emeriti; members of the Board of Governors; visitors to campus, including visiting speakers and scholars; third party contractors; and volunteers.</p>

### Purpose

To provide information about graduate **student financial supports** at the University of Alberta.

The purpose of this procedure is to ensure consistency in fundamental financial support practices and procedures across the institution, while allowing academic units sufficient flexibility to administer their financial supports in a manner appropriate to their individual needs and objectives and in alignment with institutional objectives.

### PROCEDURE

#### 1. ADMINISTRATION

Merit-based student financial supports are normally administered by the Faculty of Graduate Studies and Research (FGSR) as specified in the terms of reference. Recipients of merit-based student financial supports are nominated to the Faculty of Graduate Studies and Research by Faculties, departments or units on campus as specified in the terms of reference.

Need-based student financial supports are normally administered by the Office of the Registrar as specified in the terms of reference.

The FGSR will communicate with the Office of Advancement on recipient selection for donor funded student financial supports. The FGSR and Office of Advancement will work collaboratively to ensure administrative procedures align with donor intent.

Faculties, Departments and other administrative units who are responsible for nominating recipients to the FGSR will administer selection practices that meet the eligibility and selection criteria outlined in the terms of reference. Nominating units will inform the FGSR when they have identified that selection criteria no longer support a diverse pool of eligible applicants or become too restrictive to allow the university to award the funds every year. The FGSR will work with the nominating unit and Office of Advancement to explore options for changing the selection criteria to address the limitations.

The FGSR will coordinate with Financial Services as necessary to ensure proper financial management and disbursement of student financial supports.

## 2. MAINTENANCE OF TERMS OF REFERENCE

### A. GENERAL ELIGIBILITY

Student financial supports are tenable only at the University of Alberta unless otherwise stated in the **terms of reference**. Student financial supports specific to a particular Faculty are generally tenable only in that Faculty.

### B. AMENDING TERMS OF REFERENCE

When the terms of reference become prohibitive to fulfill through obsolescence, then the University may amend the terms to carry out the nearest possible original intent of the donor, while still ensuring that the benefit of such financial supports continues. For example, amendments to existing terms of reference may be necessary when there are no longer eligible students due to changes in University programming. Amendments to the general selection and eligibility criteria in the terms of reference previously approved by the Graduate Scholarship Committee (GSC) must be forwarded to GSC for approval. The Faculty of Graduate Studies and Research is responsible for monitoring these financial supports requiring amendment and will consult with the appropriate stakeholder(s) before forwarding to GSC.

### C. ANNUAL VALUE SETTING

For donor funded student financial supports for which the FGSR holds administrative responsibility, the FGSR will determine the annual value to be expended unless indicated in the terms of reference.

## 3. MERIT-BASED FINANCIAL SUPPORT

### A. SELECTION CRITERIA

Primary selection criteria for merit-based student financial supports will be based on **graduate academic performance**. Secondary selection criteria may include, but are not limited to, community service, leadership, and experiential learning.

If selection cannot be made by applying both primary and secondary selection criteria, selection will be based on a combination of primary criteria and criteria that most closely fulfills the original purpose of the financial support.

### B. ELIGIBILITY

Students registered in master's programs are eligible to hold awards during the first four years of their program unless stated otherwise in the terms of reference for the award. Consideration for funding for the fifth year of a master's program may be considered if a compelling explanation (ie. illness, parental leave, personal catastrophe) outlined in a letter of support from the department is provided.

Students registered in doctoral programs are eligible to hold awards during the first six years of their program unless stated otherwise in the terms of reference for the award. Consideration for funding for the seventh year of a doctoral program may be considered if a compelling explanation (ie. illness, parental leave, personal catastrophe) outlined in a letter of support from the department is provided.

### *Full-time Registration*

Full-time thesis-based students are required to be registered full-time in each term for the duration of the award.

### *Ineligible Student Categories*

Part-time students are not typically eligible, unless specified in the terms of reference for the award. If a student is selected as the recipient of one of the limited number of awards for which part-time students are eligible, the student is required to register in each term for the duration of the award.

Students registered in Graduate Certificate and Diploma programs are not typically eligible, unless specified in the terms of reference for the award. If a student is selected as the recipient of one of the limited number of awards for which Graduate Certificate and Diploma students are eligible, the student is required to register in each term for the duration of the award.

Qualifying students, students on academic probation, visiting students and students in cost-recovery programs are not eligible to hold FGSR-administered awards, unless specified in the terms of reference for the award.

## C. DISBURSEMENT

Graduate student financial supports are normally processed through direct deposit payroll, unless otherwise specified in the terms of reference. Recipients are responsible for setting up their direct deposit information in order to receive payment.

Merit-based student financial supports are normally payable only when students are registered full time at the University in the term during which funds are disbursed, unless otherwise specified in the award terms of reference.

Merit-based student financial supports up to and including the value of \$6,000 are paid in one payment during the timeframe outlined in the award letter of offer.

Merit-based student financial supports whose values are between \$6,000 and \$11,999.99 are either paid in two equal sums in consecutive terms (ie Fall and Winter) or disbursed as per the semi-monthly payroll schedule over the duration of twelve months. Students receiving term-based funding who no longer meet the eligibility criteria in the second term may have their payment terminated, and students receiving semi-monthly funding may have their payment terminated the month in which they complete their degree requirements.

Merit-based student financial supports whose values are greater than \$12,000 will be disbursed as per the semi-monthly payroll schedule over the duration of twelve months. If a student no longer meets the eligibility requirements of the financial support remaining payments may be terminated.

Changes to a student's status which render the recipient ineligible to hold all or some specific portion of an award, may result in the requirement to repay all or a portion of the award. These changes include but are not limited to: being placed on academic probation, withdrawal from the program, change in registration status, change in program, accepting another award which precludes holding concurrent awards.

## D. ACADEMIC TRANSCRIPT

Scholarship and Prize student financial supports approved by GSC and administered by the Faculty of Graduate Studies and Research will be listed on the academic transcript. Need-based student financial supports will not appear on the academic transcript.

## 4. NEED-BASED FINANCIAL SUPPORT

The Office of the Registrar administers need-based financial supports including bursaries and **emergency funding** for students. Additional bursaries are administered through the Graduate Student's Association and University of Alberta International. The Office of the Registrar, also provide advising and program support for government financial

support programs. The procedures outlined in this section do not refer to how government financial support programs are supported.

#### A. SELECTION CRITERIA

Primary selection criteria for need-based student financial supports will be based on **demonstrated financial need**. Secondary selection criteria may include, but are not limited to, community service, leadership, experiential learning, and graduate academic performance, as long as the graduate academic performance requirement does not exceed a 3.0 GPA.

If selection cannot be made by applying both primary and secondary selection criteria, selection will be based on a combination of primary criteria and criteria that most closely fulfills the original purpose of the financial support.

#### B. ELIGIBILITY

Need-based student financial supports established by the University, unless otherwise specified by the terms of reference of the financial support, will normally be available to students with full-time enrollment and have demonstrated financial need for the current academic year.

Demonstrated financial need will normally be assessed through a common assessment practice as defined by the Office of the Registrar using a student's expenses and resources. The common assessment practice is derived from provincial and federal loan guidelines. The common assessment practice will also allow for exceptional student situations where the common assessment does not reflect the true need of eligible students or does not address the institutional, diversity, or equity priorities of the University.

Domestic students are expected to access the maximum government student loan available to them in the current academic year. Assessed need that cannot be met by this loan may be met through University need-based student financial supports up to an annual maximum as determined by the University.

International students are required by the federal government of Canada to demonstrate sufficient resources to meet their cost of attendance at University in order to qualify for a study permit. International students experiencing an emergency or exceptional circumstances may be considered for need-based student financial supports if their planned financial resources have changed by completing a financial need assessment.

#### C. DISBURSEMENT

Need-based student financial supports are normally disbursed to the **student tuition account**. The first charge against any financial support is to pay outstanding University fees including tuition, incidental fees and other university-related fees.

Need-based student financial supports are normally payable only when students are in full-time attendance at the University in the term during which funds are disbursed. Need-based student financial supports will normally be applied to a single term of enrolment in the academic year in which the financial need assessment was evaluated. The student financial support value will normally be re-evaluated if the attendance or enrollment of the student changes.

### 5. ANNUAL REPORTING

Each academic year, the Vice-Provost and Dean of FGSR will present an annual report on Graduate Student Financial Support to FGSR council and then to the GFC. The report serves as an overview of graduate financial supports and services administered by the Faculty of Graduate Studies (FGSR).

### **DEFINITIONS**

Definitions should be listed in the sequence they occur in the document (i.e. not alphabetical).

Any definitions listed in the following table apply to this document only with no implied or intended institution-wide use. <a href="#">▲ Top</a>
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<b>Student Financial Supports</b>	<p>Student financial supports are items of monetary and/or other value awarded to a student by the University of Alberta or by donors through the University on the basis of completion of requirements outlined in the selection criteria or terms of reference.</p> <p>Merit-based student financial supports include, but are not limited to, awards, scholarships, prizes, and University medals. Merit-based financial supports are competitive; successful completion of the requirements does not guarantee receipt of the funding.</p> <p>Need-based student financial supports include, but are not limited to, bursaries, loans, and emergency funding.</p>
<b>Terms of Reference</b>	<p>The terms of reference of a student financial support provide all relevant information regarding how the student financial support will be disbursed, including the financial terms, the selection and eligibility criteria, and any other information pertinent to the administration.</p>
<b>Graduate Academic Performance</b>	<p>Graduate academic performance refers to the academic grading requirements for student financial supports and are categorized as superior academic achievement or satisfactory academic standing.</p> <p>Superior academic achievement will normally mean the following:</p> <ul style="list-style-type: none"> <li>i. GPA of 3.5 or higher in the University</li> </ul> <p>Superior academic achievement for entrance scholarships will normally mean a minimum GPA of 3.5 based on marks used at the time of assessment.</p> <p>Satisfactory academic standing is defined as:</p> <ul style="list-style-type: none"> <li>i. GPA of 3.0 for newly admitted graduate students</li> <li>ii. GPA of 2.7 or greater for continuing students</li> </ul> <p>Satisfactory academic achievement for entrance scholarships will normally mean a minimum GPA of 3.0 based on the marks used at the time of assessment.</p>
<b>Demonstrated Financial Need</b>	<p>Demonstrated financial need is a calculation of overall financial shortfall available for a student's academic and basic living costs for the current academic year. The calculation will normally be based on the common assessment practice.</p>
<b>Full-Time Attendance</b>	<p>Full-time attendance as defined within the <i>University Calendar</i>.</p>
<b>Emergency Funding</b>	<p>Emergency funding is a financial support given to a student primarily on the basis of demonstrated financial need and who have demonstrated emergent financial challenge. Emergency funding can either be repayable or non-repayable.</p>
<b>Student Tuition Account</b>	<p>The student tuition account is the receivable account by which charges (including tuition and fees), and payments are processed. Students access their account details through Bear Tracks.</p>

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