Example REU Timeline

Before group is together:
1. Check with Associate Chair and make sure that the correct classes are on the schedule for the ten-week summer session. Get course numbers. Make sure that departmental permission is required, and that no salary will be paid.

After group is together:
1. Send e-mail info letter to the students (see sample letter). Prior to this, you need to check all info to see if current, particularly prices, dates, web addresses. Should include information on admissions application, housing application, measles form, parking permits, first meeting, social security card, campus map. Currently must use online application system to the university, and they get the $25 application fee waived by using a code provided to you (see application instructions). Students are instructed to fill out an online housing application (see family or single student application instructions). Ask them to have their admissions, housing, and measles applications submitted by May 1 or before.

2. Create a Roster spreadsheet of your students with EMPL ID, email, address, phone etc. to track info as you receive it and have one source for all your personal data on the students.

3. Send an email to Admissions (directly to Linda Esposito at linda.esposito@nau.edu) with student names, emails and addresses, so she can run the admission process for them and track them (see attached). Once the students have applied for admission, they will show up in LOUIE and have Empl IDs. These are needed for all memos and NAU forms. Check admission status in LOUIE, (Records/Enrollment, Career & Program Info, Student Program/Plan, key in Last name/First name). Look for "Hold" red circle at top of page. If there is a Hold that means that the student's immunization record is incomplete. If not there, then they are OK and in the system.

4. Once you have selected the students, call Cheryl Schrader, ext. 7637, to let her know NUMBER of STUDENTS, and where she thinks she will have space for them. They can't commit until all the students have left campus (typically in mid-May). You should identify where you want to utilize NAME OF RES HALL HERE. Tell Cheryl that you will be sending them a group of # STUDENTS, could they please be put as close together on one floor as possible, and if possible on top floor because it's quieter and they sleep during the day. Send email to Cheryl with the list of names to reserve spots and a request to forward the bill to REU admin support person or PI with the correct Speedchart accounting code.

After students have been admitted:
1. Send TUITION FEE WAIVER spreadsheet (see form) to MaryLynn Quartaroli (mtq2@nau.edu) with a list of students, EMPL IDs, tuition amount, fee amount as well as the course sequence numbers. Be SURE to specific your OGCS Grant Manager. Also send the OGCS TUITION/FEE WAIVER REQUEST FORM (see form) with the PI's and Department Chair's signatures; MaryLynn will get the other required signatures for this form. She will prepare and submit the Memo from the Vice President (Provost beginning in FY14??) to the appropriate offices.

Make sure students are enrolled before this spreadsheet and the tuition waiver form are sent.

2. Complete HireExpress input for the students. This process requires getting the following info from each student: DOB, SSN#, middle name, email address. You will need to request this info via email from the students in advance of them coming to Flagstaff, and let them know they will receive a "welcome" email from NAU payroll/HR inviting them to complete the online HR forms. You will also need to process the ePARs online to pay them.

3. Figure out how much the travel checks will be and process them through A/P as GAE's or check requests. This is usually done the week before they arrive.

4. Housing Application process is done online. Instructions for this are included in the example Intro Letter. Let the housing people know if a student will be arriving very late in the day or on a different date and communicate instructions to students. Need to send list of student names so they can make this online adjustment for us.

5. In May, send memo (if applicable; see example) with Empl ID to Kylie Pond (x6499) in Dining & Card Administration, indicating that they are "visiting students for the summer residence dates". Indicate that the department will be paying for their cards and ask her to submit an IDT to be paid out of SPEEDCHART NUMBER. They will use the list to check off the names and then forward the IDT to you when all are done. Cost for cards is $25 each.

After the measles immunizations have cleared:

1. Check in LOUIE to see if all the measles holds have been cleared. Send memo/e-mail to registrar.enrollment@nau.edu asking them to enroll the students in the classes. Note that the students cannot be enrolled until their measles holds have been cleared and that tuition cannot be waived until they are enrolled. The timing can tricky.

> *SAMPLE: The purpose of this email is to request that you enroll the 7 REU (Physics & Astronomy) students into the two 5- week summer session (6/4-8/7/12 – Summer Session #1124) in the following 2 courses. They have gone through admissions and submitted their measles documents. They are enrolled as non-degree seeking students.*

> | | | | |
> |---|---|---|---|
> | *PHY 485C* | *2160* | *2 hours* | *Undergraduate Research* |
> | *PHY 498C* | *2161* | *1 hour* | *Senior Seminar* |
> | ***Student*** | | ***NAU ID*** | |
> | *Name* | | *##111* | |

Just before the students arrive:
1. Copy syllabi; make copies for mentors, also.
2. *Purchase any needed supplies for each student.*
3. Let the mentors know the Welcome Dinner date/location.

First day of class:
1. "Orientation." (See example.) Tell them that they really are expected to work 40 hours per week. Discuss safety issues. Pass out syllabi. Ask them to take a copy to their mentor. Pass out notebooks, discuss importance of keeping good notes.

2. Pass out travel/application fee reimbursement checks.

3. Group visit to union for ID cards and meal plans, then to Centennial building to be put on payroll, parking permits. Some students will go to Parking before the meeting to get their pass. Be sure they choose "full time student."

4. Make sure students know how to find their mentors.

After first pay check: Make sure that the students are not paying social security. There is not enough money in the grant to pay our share. Since they are enrolled full-time, they should not be paying social security, only income tax.

Contacts for these Grant programs:
Cheryl Schrader – Residence Life – x7637
Linda Esposito – Admissions – x6043   Speedchart#
Name of Sponsored Project manager– Sponsored Projects – x####
Kylie Pond - Dining & Card Svs. – x6499
Name of OGCS Administrator– x####
Hazael Maierson – OGCS – tracks paperwork x4880

Payroll Tax implications:
If students will be living in Arizona for the time that they are working they will be paying Arizona state tax. The personal exemption for AZ is as follows:

 Federal personal exemptions for 2013 are $3,900 per person. In Arizona, the personal exemptions are figured differently. In 2012, a single person or a married person filing separately gets a personal exemption of $2,100.

What this means according to Linda in Payroll is that they will be responsible for the AZ tax on the difference between what they make, less the personal exemption of $2,100.

At the Federal level, it would be the difference between their stipend and $3,900; however, if they have another job, those earnings would be calculated in as well. If they don't work in their state, then they would have to file for Federal and AZ taxes. If they do work in their state, then they would need to file for that state as well.

In terms of NAU payroll, they can select the lowest amount of taxes to be taken out, but probably shouldn't select EXEMPT, because technically they are not. We should not give tax advice.