

Budgeting and Charging of Mandatory Fees Offset for Qualifying Graduate Assistantships

The Graduate College Handbook has been updated as follows:

3.3.2 Awards to Offset Mandatory Fees

Graduate students appointed to a graduate assistantship appointment of 1/4-time or more for at least 3 months in fall and spring terms and for 4 weeks in summer term receive a 50% award for the Technology Fee, Health Fee, and Health Facility Fee. (Awards for Health Fee and Health Facility Fee become effective Fall 2023).

Starting in Fall 2024, graduate students appointed to a graduate assistantship appointment of 1/4-time or more for at least 3 months in fall and spring terms and for 4 weeks in summer term receive a 50% award for the Technology Fee, Health Fee, and Health Facility Fee and 25% coverage of Activity, Services, Building & Recreation Fee.

Budgeting on Proposals:

Starting with fall semester 2023, a 50% award for the Health Fee and a 50% award for the Health Facility Fee must be budgeted on proposals, for both federal and non-federal funding sources when tuition is allowable.

These fees will be budgeted in the Tuition budget category. F&A costs, using MTDC, will not be charged on mandatory fees offset. The FY24 Health Fee is \$151.00 and the FY24 Health Facility Fee is \$3.00 for a total of \$154.00 per semester. Fee Details can be found at: <https://www.registrar.iastate.edu/fees>

A 4.2% inflation factor is applied to out years on tuition and mandatory fees. The Streamlyne PD Tuition Calculator at: <https://www.ospa.iastate.edu/streamlyne/pd-job-aids-and-calculators> will be updated for these changes by October 1, 2023. One combined amount for tuition and mandatory fees will be listed in the tuition calculator.

For proposal budget calculation purposes, per semester per qualifying graduate assistantship:

- **Fall 2023 and Spring 2024 - Health Fee and Health Facility Fee will be budgeted at \$77.00 (50% award).**
- **Summer 2024 - Health Fee and Health Facility Fee will be budgeted at \$38.50 (50% award).**
- **Fall 2024-Spring 2025 - Health Fee (50% award), Health Facility Fee (50% award), and Activity, Services, Building & Recreation Fee (25% award) will be budgeted at \$189.00.**
- **Summer 2025 – Health Fee (50% award), Health Facility Fee (50% award), and Activity, Services, Building & Recreation Fee (25% award) will be budgeted at \$94.00.**

Costing Mandatory Fees Offset:

For costing purposes, the costs of mandatory fees offset must be allocated using the same method as tuition that is charged to the award for each qualifying graduate assistantship.

The process for the assessment of mandatory fees offset is to assess 100% of the entire fee to the graduate student on their U-bill, and then have an award offset scholarship charged to an ISU worktag. The mandatory fees will be budgeted and expensed in line with the tuition scholarship for the grad student. The mandatory fee will be charged to the tuition line on the ISU SPA Financial report and will not be charged F&A costs for awards using MTDC (same as tuition costs).

Required Effective Date for Budgeting on Proposals: November 1, 2023