FELLOWSHIP FORM 90
REVISED PROCESS

February 2017
Revision process & participants
Current process
Process changes
Situational impacts
New process
Next steps
Who to contact for help
PROCESS IMPROVEMENT TEAM

Business Management
Renae Barbour
Leslie Barnes
Cheryl Cornell
Erin Fetter
Mona Holdcraft
Marci Moore
Heather Oakley
Heather Toro

Grad School
Cyndi Lynch

Sponsored Programs
Susan Corwin
Christy Haddock
Suzanne Payne

Business Process Re-Engineering
Andrew Bean
Whitney Beutel
Lindsey Farrell
Documents all aspects of a fellow’s support
Provides tuition/fee billing information to Bursar
Provides financial support info to Div. of Financial Aid
Enables institutional tracking and reporting on fellowships
CURRENT PROCESS

Paper-based
Requires several approvals
  • Some are duplicates
  • Others are non-value added
Copies information between forms and systems multiple times
Lacks ability to track status/history
Difficult to understand
Error prone
Confuses responsibilities in appointment process
Delays fellowship payroll actions
Streamline the setup process
- Decrease cycle time
- Decrease time spent on reviews and copying information
- Eliminate duplicate or unnecessary approvals

Improve fellowship management
- Increase accuracy of offer letters, appointment setups
- Standardize with other processes (e.g. award setups, other payroll actions)
- Enhance reporting and management information
Grad School and SPS approvals will be discontinued
Departmental approvals no longer required
Forms emailed to form90@purdue.edu
  • Departments will not receive a copy back
Departments can prepare FA forms as soon as Form 90 submitted
  • Attach submitted Form 90 to FA form
Coming later, Form 90 replaced with web-based form
**Offer Letter**

- Acts as the “contract” with the student
- Documents the departmental approval of the terms of the Fellowship
  - If externally funded, a supplemental letter may be helpful
- Must be clear and accurate
- Specific responsibilities in the offer letter process vary by department

**Form 90**

- Documents the fellowship for institutional reporting
- Provides tuition/fee info to Bursar
- Provides aid info to DFA
- Department is responsible for accuracy
  - Business managers expected to confirm accuracy
- Departmental approval is not required
- No longer approved by SPS/Grad School
- No copies returned after submission
- Later: Form 90 to be replaced with web-based form
NOTES BY FUNDING SOURCE

Externally-sponsored fellowships
• Contact SPS for award setup process prior to submitting Form 90
• Questions about commitment of GTS support should be resolved prior to submitting Form 90

Grad-school fellowships
• Grad School BO will setup IO’s after Form 90 submitted
• Departments will be notified of new IO via email to form preparer

Departmentally-funded fellowships
• Departments can submit FA forms immediately after submitting Form 90’s
NEXT STEPS

Changes take effect March 1, 2017
  • Forms submitted to Grad School on or after March 1 will not be returned with approvals

Forms in process
  • **Summer 2017 start**: submit via process discussed today
  • **Fall 2017 (or later) start**: hold until May 1

Expect to implement web-based form for AY17-18 fellowships
  • Fellowship reporting available to departments

Existing documentation and websites will be updated to reflect the revised process

Additional changes may come as a result of the BPR-HCM project
Process Questions
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To submit Form 90’s
form90@purdue.edu