

Download Policies Packet:  
[tx.ag/2025REUpolicies](https://tx.ag/2025REUpolicies)



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[tx.ag/2025REUcontacts](https://tx.ag/2025REUcontacts)



# REU/SURE Coordination Meeting Summer 2025

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*Annabelle G. Aymond*  
*Interim Associate Director*

Office of Undergraduate Research  
[ugr@tamu.edu](mailto:ugr@tamu.edu)

[tx.ag/UGRSummerListserv](https://tx.ag/UGRSummerListserv)

# Download PDFs



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[tx.ag/2025REUpolicies](https://tx.ag/2025REUpolicies)



[tx.ag/2025REUcontacts](https://tx.ag/2025REUcontacts)



[tx.ag/UGRSummerListserv](https://tx.ag/UGRSummerListserv)

**NOTE:** A meeting summary and revised packet will be distributed later.

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Note: The “LAUNCH” office has officially been disaggregated as of fall 2024. Updates to branding and public-facing materials are in the process of being updated.

Office of Undergraduate Research under  
Academic Affairs in the Office of the Provost

Building and Staff Changes

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# Application of Policies



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Undergraduate research programs vary in structure, timing, eligibility, and funding source.

Reach out to [ugr@tamu.edu](mailto:ugr@tamu.edu) for clarification, if needed.

Note that some of the policies in this packet apply only to externally funded programs that operate in the summer semester (e.g., NSF-REU sites).

Others are only applicable to programs that accept non-degree seeking/non-Texas A&M students

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# Scholarships & Financial Aid



<https://financialaid.tamu.edu>



## EXCELLENCE YOU CAN AFFORD FIND TEXAS A&M AID OPPORTUNITIES

You deserve access to a quality education that will open doors of opportunity. We want to partner with you to pay for your college expenses. There are many funding options to reduce your costs. Texas A&M values a high-quality degree at a reasonable price. Your education is the investment of a lifetime. Let us help you expand possibility and launch your future.

[LEARN MORE](#)

[FORMS AND MEDIA](#)

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[For University Scholarship Administrators](#)



[For Scholarship Donors](#)



[For Student Emergency Aid](#)



[Higher Education Emergency Relief \(HEER\) Funds](#)



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# For University Scholarship Administrators

The Texas A&M University System Internal Audit Department has deemed Scholarships & Financial Aid as responsible for general oversight of university scholarship processing. In such, Scholarships & Financial Aid is required to request and facilitate self-audit and compliance reviews of University scholarship awarding units to ensure compliance with University Rules and Regulations as well as donor intentions.

Below are links to resources and forms available to University scholarships administrators. Some links provide access to administrative systems that require access requests and training.

University staff and administrators may contact the Scholarships Office at (979) 845-3982 or [fellowschol@tamu.edu](mailto:fellowschol@tamu.edu) with questions and concerns. Students may email [scholarships@tamu.edu](mailto:scholarships@tamu.edu) with questions and concerns.

## Resources

[SB 17 and University Scholarship Administration - Effective January 2024](#)

[Disbursement Dates for Fellowship Payments](#)

[Staff Resources Frequently Asked Questions \(FAQ\)](#)

[Scholarship Administrator's Resource Guide](#)

[Policy for Student Travel, Awards, Prizes, and Other Financial Assistance - Updated April 2024](#)

[University Rule for Non-Resident Tuition Waivers](#)

[University Scholarship Committee](#)

## Forms

[+ Student Payment Request Forms](#)

[+ Account Request Forms](#)

[+ Scholarship Administrator Training Information and Access Request](#)



Purpose of Payment	If the student is enrolled in hours at the University during the term (semester) of payment						If the student is <b>NOT</b> enrolled in hours at the University during the term (semester) of payment					
	Does the payment count as financial aid?	When is the payment counted?	May the student request a Cost of Attendance increase?	Is the funding reported on the student 1098-T?	Is funding taxable for a U.S. taxpayer?	Is funding taxable in the U.S. for an international taxpayer?	Does the payment count as financial aid?	When is the payment counted? <sup>1</sup>	May the student request a Cost of Attendance increase? <sup>2</sup>	Is the funding reported on the student 1098-T?	Is the funding taxable for a U.S. taxpayer?	Is the funding taxable in the U.S. for an international taxpayer?
Award or prize, includes gift cards (academic/non-academic)	Yes	Term of payment	No	Yes	Yes, once past <a href="#">taxable threshold</a>	<a href="#">Yes, 30%</a>	Yes	Next term of enrollment	No	Yes	Yes, once past <a href="#">taxable threshold</a>	<a href="#">Yes, 30%</a>
Internship stipend (for credit or required)	Yes	Term of payment	No	Yes	Yes, once past <a href="#">taxable threshold</a>	Yes, 14%	Yes	Next term of enrollment	No	Yes	Yes, once past <a href="#">taxable threshold</a>	Yes, 14%
Internship stipend (no/zero credit or optional)	Yes	Term of payment	No	Yes	Yes, once past <a href="#">taxable threshold</a>	Yes, 14%	Yes	Next term of enrollment	No	Yes	Yes, once past <a href="#">taxable threshold</a>	Yes, 14%
Mentor/Ambassador stipend	Yes	Term of payment	No	Yes	Yes, once past <a href="#">taxable threshold</a>	Yes, 14%	Yes	Next term of enrollment	No	Yes	Yes, once past <a href="#">taxable threshold</a>	Yes, 14%
Research stipend (for credit or required)	Yes	Term of payment	No	Yes	Yes, once past <a href="#">taxable threshold</a>	Yes, 14%	Yes	Next term of enrollment	No	Yes	Yes, once past <a href="#">taxable threshold</a>	Yes, 14%
Research stipend (no/zero credit or optional)	Yes	Term of payment	No	Yes	Yes, once past <a href="#">taxable threshold</a>	Yes, 14%	Yes	Next term of enrollment	No	Yes	Yes, once past <a href="#">taxable threshold</a>	Yes, 14%
Summer REU funding	Yes	Term of payment	No	Yes	Yes, once past <a href="#">taxable threshold</a>	Yes, 14%	Yes	Next term of enrollment	No	Yes	Yes, once past <a href="#">taxable threshold</a>	Yes, 14%
Reimbursement or payment for books, supplies, or equipment	Yes	Term of payment	Possibly	Yes	Yes, once past <a href="#">taxable threshold</a>	Yes, 14%	Yes	Next term of enrollment	No	Yes	Yes, once past <a href="#">taxable threshold</a>	Yes, 14%
Reimbursement or payment for graduate health insurance <i>Regardless of whether or not reimbursed based on receipts</i>	Yes	Term of payment	Possibly	Yes	Yes, once past <a href="#">taxable threshold</a>	Yes, 14%	Yes	Next term of enrollment	No	Yes	Yes, once past <a href="#">taxable threshold</a>	Yes, 14%
Travel grant/stipend (for credit or required) <i>Not reimbursed based on receipts</i>	Yes	Term of payment	Possibly	Yes	Yes, once past <a href="#">taxable threshold</a>	Yes, 14%	Yes	Next term of enrollment	No	Yes	Yes, once past <a href="#">taxable threshold</a>	Yes, 14%
Travel grant/stipend (no/zero credit or optional) <i>Not reimbursed based on receipts</i>	Yes	Term of payment	Possibly	Yes	Yes, once past <a href="#">taxable threshold</a>	Yes, 14%	Yes	Next term of enrollment	No	Yes	Yes, once past <a href="#">taxable threshold</a>	Yes, 14%
Reimbursement based on receipts for representing TAMU at training, conferences, or workshops <i>Official University Business</i>	No	N/A	No	N/A	<a href="#">No</a>	<a href="#">No</a>	No	N/A	No	N/A	<a href="#">No</a>	<a href="#">No</a>
Reimbursement based on receipts for training, conferences, or workshops <i>Not attending on behalf of the University</i>	No	N/A	No	N/A	<a href="#">Yes</a>	<a href="#">Yes</a>	No	N/A	No	N/A	<a href="#">Yes</a>	<a href="#">Yes</a>

<sup>1</sup> Payments will be added to student financial aid record. The following message will be displayed in the Financial Aid Portal: *This amount was reported as funding you received from a Texas A&M college, department, or office. Federal financial aid regulations require this assistance to be counted as student financial support. These funds will not pay to your student account bill. You have already received this payment for travel, an award or prize, academic support/supplies, etc.*

<sup>2</sup> Only items that fall into the Cost of Attendance during a period of enrollment may be considered for an increase and only on a case-by-case basis



# REU/Non-Enrolled Students Payment Process/Request



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## REU/Non-Enrolled Students Payment Process/Request

All University-administered funding provided to students to assist with educational expenses, experiences, travel, or prizes/awards must be considered in the student aid package. To learn more, please visit the [Policy for Student Travel, Awards, Prizes, and Other Financial Assistance](#).

In collaboration with Student Business Services, Scholarships & Financial Aid has identified a process that will permit the posting of funds on student accounts, even if students are not enrolled for the term. This process accommodates programs such as a summer Research Experiences for Undergraduates (REU) students.

It is important to understand that funds paid to students during a period of non-enrollment will be monitored by Scholarships & Financial Aid and without exception will be counted as financial aid for the next term of enrollment (typically fall). The sum total of funds paid will appear as **Univ Paid- No Enrollment** in the student's Financial Aid Portal.

These payment requests are for non-enrolled students (or enrolled in only 499 course). Do not use this process to provide payments to students that are/will be enrolled during the term.

[Instructions to Submit Scholarship Payment Request for Summer REU/Non-enrolled Students](#)  
[Online Payment Request for Summer REU/Non-enrolled Students](#) - *Available May 15, 2024*

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# REU/Non-Enrolled Students Payment Process/Request



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- You will only complete the googledoc if the student is not enrolled in any credit bearing classes
  - if you incorrectly submit a credit bearing student, this could potentially affect their following fall funding
- If the student is enrolled in any classes that are counting, you will use SPARTA to award like normal or submit the Scholarship Payment Request Form
- This process is for summer only, if you have a student in fall/spring in zero hours, the dept will have use another method of paying them

SEE PAGE(S) IN PACKET

pgs. 11-12

# REU/Non-Enrolled Students Payment Process/Request



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## Timeline

- Scholarships & Financial Aid will submit requests to Student Business Services once a week
  - Payment requests are due no later than 5 pm each Monday
  - Scholarships & Financial Aid will submit payment requests each Tuesday
  - Payments will be applied to student accounts and refunded via direct deposit. Refunds will not be generated for students who have not provided their bank account information
  - Refunds are typically received within 3-5 business days
  - Reminder: Payments submitted after fall tuition and fees have been calculated will apply to any balance due on the student account and will not refund.
  - If you have questions or if corrections are needed, please use your @tamu email address to contact [notenrolledREU@tamu.ed](mailto:notenrolledREU@tamu.ed)
-



# Senate Bill 17 Reminders

In general, university programs cannot be exclusive to one identified group. They must be open to everyone and need to be supported in a consistent manner.

S.B. 17 does not alter our existing obligations under federal and state law, including the anti-discrimination requirements of Title VI and Title VII of the Civil Rights Act of 1964, and the Equal Protection Clause of the 14th Amendment.

We must continue to ensure that our programs and activities are open and available to all persons on a non-discriminatory basis.

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# Exclusions



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- SB 17 does not apply to programs for first generation, low-income college students, or underserved student populations, as long as the programs are designed and implemented without regard to race, sex, color, or ethnicity.
  - These programs can continue as well as programs for veterans and students with disabilities as required under federal law.
  - More information is available at <https://financialaid.tamu.edu/policies/scholarship-university-administrators>
-



- Criteria used for recipient selection must be based on information presented in a scholarship application.
  - Students are not to be awarded scholarships based on attributes, information, or involvement not reflected/documentated in an application.
  - Acceptable criteria include
    - **Academic record** (GPA)
    - **Financial need** (determined by aid application)
    - **Course of study** (college/major)
    - **Student type** (freshman, transfer, undergraduate student, graduate student, etc.)
-



The University cannot administer gifts that use the following criteria to exclude recipients. This may not be a comprehensive list, as other criteria may also be deemed as unacceptable.

- **Race**
  - **Color**
  - **Religion**
  - **Sex**
  - **Age**
  - **National or Ethnic Origin**  
(i.e. born in the U.S.)
  - **Sexual Orientation/ Gender Identity**
  - **Personal characteristics or physical appearance**
  - **Marital Status**
  - **Participation in varsity athletics** (except funds administered by Athletics)
  - **Designation of donor relative as a recipient**
-

# Reminder



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Admitting and enrolling students, and paying stipends through Scholarships & Financial Aid, is the highly preferred process.

Hiring students and/or paying students through systems such as AggieBuy is not encouraged and have potential consequences for students.

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# Scholarships & Financial Aid



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**Elizabeth Costea**

*Financial Aid Advisor*

**Allison Kalinec**

*Associate Director*

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Benefits of enrolling students:

- Track participation in high-impact practices and research activities
- Verify bacterial meningitis vaccinations
- Upload student college transcripts
- Access to the early graduate admissions program

**Non-TAMU students admitted into the university must be classified as “Non-degree seeking” students.**

**Deadline to Apply: May 1, 2025**

[https://launch.tamu.edu/getmedia/306ad60f-dce8-4829-9835-703ebbc8ddf0/2025\\_REU-SURE\\_Admissions\\_Documentation.pdf](https://launch.tamu.edu/getmedia/306ad60f-dce8-4829-9835-703ebbc8ddf0/2025_REU-SURE_Admissions_Documentation.pdf)

SEE PAGE(S) IN PACKET

# Admissions



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**Connie Coleman**

*Director*

**Jessica Pitt**

*Program Coordinator I*

**Tashia Cole**

*Assistant Director*

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TAMU 499 (0 credit hours) was established by the Office of the Registrar in summer 2020 to help:

- Make sure students are enrolled
- Streamline the fee waiver process
- Streamline the distribution of stipends (cued by SFAID)
- Guarantee student access to on-campus resources (cued by SBS)
- Track involvement in summer undergraduate research

TAMU 499 is only for students in **externally funded** programs, such as an NSF-REUs. It applies to both current TAMU students and non-TAMU (non-degree seeking) students.

The registration process can start as early as April, if students have been admitted.

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pgs. 7-8

## Reminders about the TAMU 499 placeholder course:

- TAMU 499 is non-credit bearing.
- TAMU 499 does not appear on a student's transcript.
- TAMU 499 does not appear in Howdy.
- TAMU 499 does not appear in Navigate.

## How to enroll students in the TAMU 499 placeholder course:

- The CRN for the College Station\* section (TAMU 499-300) is 27755.
- The CRN for the Galveston section (TAMU 499-300) is 30633.
- Advisors can find the CRN by searching SSASECQ in Compass using the term, TAMU, and 499. Or, they can use SSASECT.

\*Students from the School of Dentistry, Higher Education Center at McAllen, and the Health Science Center should be placed in the College Station section.

# Registrar



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**Nick Piwonka**

*Associate Registrar*

**Matthew D. Johnson**

*Assistant Registrar*

**Laura Zeig**

*Director of Operations*

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# Student Business Services



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Students needing course credit for externally funded experience:

- **Must be enrolled in TAMU 499 course**
- **Can also be enrolled** in a 1-credit hour 485 or 491 course in their department

Required Tuition and Fees for the 1-credit hour 485 or 491 course will be **WAIVED** by **SBS as long as students are also in the TAMU 499 course.**

Tuition and fees are **NOT WAIVED** for any other courses besides the 0-credit hour TAMU 499 course and a 1-credit hour 491 or 485 course.

SEE PAGE(S) IN PACKET

pgs. 9-10

SBS has updated their process to include:

- Automatic reversal of \$100 General Deposit
- Automatic waiver of Required Tuition and Fees

However, students must be registered for the TAMU 499 course\* for this automation to take effect.

\*Only students in externally funded programs are eligible to be enrolled in the TAMU 499 course.

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pgs. 9-10



# Late Fees



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It is crucial students are registered for the TAMU 499 course prior to the 1st day of classes of the Summer I term. Students who are registered after that date may be subject to a \$100 Late Registration Fee in accordance with state statutes and census dates. If you are unable to enroll your students in the TAMU 499 prior to the 1st day of classes, please let the Office of Undergraduate Research staff know and we will work with SBS to resolve any issues.

SEE PAGE(S) IN PACKET

pgs. 9-10

# Student Business Services



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**LeeAnn Pickett**

*Assistant Director*

**Toni Flores**

*Financial Practitioner I*

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# Tax Compliance, Questions



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To determine if your specific stipends are taxable and how they should be reported, provide additional information about your program to Tax Compliance & Reporting.

Example: If an REU participant is providing a service to a research program that benefits the university, the stipend is taxable.

[tax@tamu.edu](mailto:tax@tamu.edu)

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pg. 14

The health center fee is facilitated the TAMU 499 course.

If students are not in the TAMU 499 course and not assessed the fee, students do not have access to medical services through UHS unless paid for separately.

Students who use UHS are still responsible for the cost of the services. While insurance is not required by UHS, filing charges to insurance may benefit the student.

However, it takes 60-90 days to hear back from insurance companies. Students may have balances on their accounts after they leave the university. Advisors should work directly with their students and UHS to pay off the balance through Howdy.

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pgs. 15-16

**Brittany Pekar**

*Assistant Director, Client Services*

# Student Health Insurance (OREC)



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## **Can programs ask for proof of insurance?**

Yes, but it is not required.

## **Can uninsured students get TAMU health insurance?**

Yes, but only if they are registered for 9+ credit hours, which is not the case for most REU and summer research students.

## **Can programs pay for health insurance on behalf of the student?**

Yes, but the benefit must be documented in a stipend offer letter or other written agreement. Accounts Payable must report this benefit to Scholarships & Financial Aid.

## **Are there any other options?**

Yes, programs can buy special event insurance through OREC for the research participants attending an event, if the program believes the event to pose a safety risk to the researchers.

SEE PAGE(S) IN PACKET

pgs. 17

**Grace Mullendore**

*Insurance Services Coordinator*

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All international student check-ins must be completed online through the ISSS Portal.

F-1, J-1, and J-2 dependents are required to have health insurance coverage.

Students who have F-1/J-1 status from another U.S. institution do not have authorization to work at TAMU unless their school or the U.S. government granted them some sort of work authorization to work here.



**Samantha Clement**

*Director*

**Amanda Brinlee**

*Senior Associate Director*

**Jie Fan**

*Assistant Director*

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**Group international REUs:** Contact EA at least six months prior to your planned departure

See proposal deadlines in packet.

Contact OREC if you are scheduling domestic field trips with your summer students.

# Education Abroad



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**Pascale Parker**

*Director*

**Dr. Christie Dunn**

*Associate Director*

**Irene Scott**

*Program Manager*

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**Student Conduct Office**

**Jay Taylor**

*Student Affairs Coordinator*

**Civil Rights Compliance (Title IX)**

**Jennifer Smith**

*Associate Vice President and Title IX Coordinator*

**Aggie Honor System Office**

**Blair Alvarado**

*Director*

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**pgs. 21-24**

## Schedule:

- **10-week Classes Start:** May 27
- **Move-in:** May 23
- **10-week Classes End:** August 5
- **Finals:** August 6-7
- **Move-out:** August 8

## Available Dorms:

- Fowler, Hughes and Schumacher Hall
- \$30 per night for a Single Room
- Single rooms only available to REUs

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pgs. 25-28

# Residence Life



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**Lisa Pierce**

*Program Manager*

**Ally Fulco**

*Administrative Coordinator*

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# Clery Act Compliance



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Required training for CSAs

Reporting requirements

Missing student instructions

SEE PAGE(S) IN PACKET

pgs. 29-32

# Clery Act



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**Michelle Jackson**

*Compliance Officer III*





Students must be enrolled for the term to purchase meal plans.

Students enrolled for 0-credit hours are still eligible for meal plans.

Students will need to request their own meal plan.

Students can only access meal plans and/or dining dollars using a TAMU ID.

## **EHS General Lab Safety Training (online)**

- Password will be emailed to REU/SURE listserv when updated

## **IRB, IACUC, IBC Training**

## **Responsible Conduct of Research Training**

SEE PAGE(S) IN PACKET

pg. 34-36

**Sergio Luna**

*Supervisor, Environmental Health and Safety*

**Kelsey McKenzie**

*Research Compliance Coordinator*

[irb@tamu.edu](mailto:irb@tamu.edu), [ibc@tamu.edu](mailto:ibc@tamu.edu), [animalcompliance@tamu.edu](mailto:animalcompliance@tamu.edu)

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**Victor Gongora**

*Program Coordinator II*

**Dr. Shannon Walton**

*Assistant Dean*

- **Online Module:** General Lab Safety Training
- **TBD:** Title IX Training
- **May 30:** Radiological Safety Training
- **June 6:** Professional Development Seminar
- **July 30:** Summer Poster Session



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# Open Discussion

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**Questions?**  
[ugr@tamu.edu](mailto:ugr@tamu.edu)

**A meeting summary and revised packet will be  
uploaded to [tx.ag/UGRSummerListserv](http://tx.ag/UGRSummerListserv)**