



William & Mary College of Arts & Science

Take-back Waiver Request Worksheet

All uncommitted graduate aid funds will be returned to the Office of Graduate Studies (OGS) by the eighth week of fall semester classes, including uncommitted spring stipends and summer fellowships. All awards relinquished by a student, regardless of the reason, are assigned to the general allocation pool. Departments/programs may request permission to reallocate these funds by submitting a Take-Back Waiver Request Worksheet (see link below).

Use the Take-Back Waiver Worksheet to:

- **Indicate release of funds** as a result of appointment or tuition changes. This may include but is not limited to: changes in rate, terminations, resignations, and student assignment changes to other funding sources such as grants/contracts. Once released, funding returns to the OGS Vice Dean's general allocation pool and is no longer available for department/program expenditure.
- **Request funds** as a result of appointment or tuition changes (as indicated above). This may include but is not limited to: changes to stipend rate, changes to stipend contract, changes to tuition rate, changes to tuition term, addition of new student, and student assignment changes from other funding sources (e.g., grants/contracts/private funds) to graduate aid.
- **Request hold of uncommitted funds for spring.** Departments/programs with spring admissions may request that all or a portion of their uncommitted funds be held for the spring semester. Departments/programs must provide a full listing of their spring commitments using this form no later than the eighth week of each fall semester.
- **Request hold of uncommitted funds for Summer fellowships.** Departments/programs may request that all or a portion of their uncommitted funds be held for summer fellowships. Departments/programs must provide a full listing of their commitments for summer fellowships using this form no later than the first week in February.

Instructions

Follow the sample entries provided on the [worksheet](#). Comments are available on the worksheet to provide additional guidance when filling out the form.

Deadline: Requests must be made at least two weeks in advance of the revised funding date. Spring stipend requests should be made before the 8th week of each fall semester.

Submit the worksheet electronically to Chasity Roberts at cyroberts@wm.edu. A copy of the approved/denied worksheet will be returned to the department/program within three working days of receipt.