



CHANGES TO STUDENT AWARD PAYMENTS FOR GRADSTAR USERS

July 22, 2021

Aesha Greene, FAAC, Office of Scholarships & Student Aid

Beverly Wyrick, The Graduate School

Moderator: Jackie Treschl, ITS Change Management



- Use the chat box to ask questions
- Questions will be addressed at the end of the presentation

- Webinar is being recorded

- Recording will be posted on the Graduate School's website: <https://gradschool.unc.edu/>



Today's Agenda



- Overview of the Changes
 - Timeline for the changes
 - Why the changes are being made
- A Look at the Changes in GradStar
- How Does the Student Get Money?
- Resources and Help
- Questions



Overview of the Changes

Aesha Greene, FAAC, Office of Scholarships & Student Aid

Overview of the Changes



BACKGROUND

- Project team formed in 2019 to begin review of all student payments
- Found inconsistencies in processing and unclear policy
- Identified need for guidance on how to manage student payments

GOALS

- Define and document information about student payments
- Ensure University is compliant with federal & state financial aid policies
- Correct known errors in processing
- Communicate changes to campus and students

Overview of the Changes



FINANCIAL AID REGULATIONS

- Any amount of assistance paid to students because of enrollment at a post – secondary institution or to cover education related expenses is financial assistance.
- Federal guidelines require campus offices to report any information which may have a bearing on a student's receipt of federal student aid to the Office of Scholarships & Student Aid (OSSA).
- Students receiving aid from the OSSA, the total aid (*including departmental funding or student award payments*) cannot not exceed the cost of attendance budget.

Overview of the Changes



BEGINNING AUGUST 2021

- All payments to students will be reported in GradStar.

Exceptions:

Payment Type	Payment Method
Employment Compensation	Payroll Services
Prizes/contests/awards open to public	Voucher
Travel for University Business or Reimbursement	Web Travel/CABS until Concur is live
Non-Enrolled Students	Voucher

Overview of the Changes



- Starting **August 2**
 - The campus voucher system will no longer allow you to enter accounts that are clearly for financial aid.
 - You'll receive an error and won't be able to save the voucher.
- Policy 706 on Finance website will be updated to include details of changes to paying students via voucher
- July 20th webinar for voucher preparers will be posted on the ConnectCarolina User Info website: <https://ccinfo.unc.edu/>



A Look at the Changes in GradStar

Beverly Wyrick, The Graduate School

A Look at the Changes in GradStar



Career Graduate Dept 405501 Degree MS Clinical Rehab & Mental Health [Create Instate/Remission Awards](#)

Summary and Requirements Data

Credit Hours

Total Bill Units	Actual Bill Units	Funding Pct
17.00	17.00	100

Instate and Remission Funding

User Type	<input type="text"/>	Instate Budget	Remission Budget
Instate/Rem Department	<input type="text"/>		
Citizenship	US Citizen	Residency	RES

Fee Payments

Year Three (AY 2021-22): The Department pays 50% of Allowable and Non-allowable fees for students corresponding with their percentage of State supported stipends. The Graduate School and Provost pay 25% each of the remaining Allowable and Non-allowable fees corresponding with the percentage of State supported stipends. The Department pays for the Non-allowable fees corresponding with the percentage of Federal Grant supported stipends.

Total Instate	Fees	Remission Amt
9201.00	979.32	

[Tuition/Fees Balance](#) [Fees](#) [Instate Remission Dates](#) [Degree Stipend Requirements](#) [GradStar Student Lookup](#)

[Comment](#)

- Instate Budget section – after entering User Type and Dept, hover over to see current instate budget amount
- No longer have campus-based and school-based tuition separated
- Comment text box

A Look at the Changes in GradStar



Department Awards/Student Payments

1-6 of 6

Award	Additional CFS	Item Type	Export Data	Audit Info														
Award Type	Award Description	Fund	Source	Account	Funding Dept	Project ID	Program	Cost Code 1	Cost Code 2	Cost Code 3	Amount	Status	Award Description	Include	% Total Stipend Award			
1	HCM	HCM Import	20101	12001	511170	390100						10000.02	Active		<input checked="" type="checkbox"/>	66.666700	+	
2	FSA	Fellowship-Schol Graduate	29130	U023E		390100						5000.00	Active	Royster fellow	<input checked="" type="checkbox"/>	33.333300	+	-
3	RIG	Research/Intern Graduate											Active		<input checked="" type="checkbox"/>		+	-
4	TGS	Training Grants - Stipend											Active		<input checked="" type="checkbox"/>		+	-
5	PCR	Prize/Contest/Recognition											Active		<input type="checkbox"/>		+	-
6	VSA	Travel Award Graduate											Active		<input type="checkbox"/>		+	-

- New award types available when you click the search button 🔍
- The **Include** button is for the user to check if they want to include the **Fellowship/Scholarship** or **Research/Internship** award types in the calculation for proration for tuition, fees and health insurance.
- The **Include** button is automatically checked for **HR/Payroll** and **Training Grant Stipends**
- Awards NOT included in proration: Prize/Contest/Recognition, Travel Award, Training Grant-Books, Training Grant-Depend Allow, Training Grant-Other, Training Grant-Non-Degree and Training Grant-Travel

A Look at the Changes in GradStar



Service (HR, Payroll, Voucher) and Non Service (NS)

Award Additional CFS Item Type Export Data Audit Info

Award Type	Award Description	Fund	Source	Account	Funding Dept	Project ID	Program
1 HCM	HCM Import	20101	12001	511170	390100		
2							

Instate (INS) and Tuition (TUI)

Award Additional CFS Item Type Export Data Audit Info

Award Type	Fund	Source	Account	Funding Dept	Project ID	Prog
1 TuitionA						

Fees (FEE)

Award Additional CFS Item Type Export Data Audit Info

Award Type	Fund	Source	Account	Funding Dept	Project ID	Program
3						

Look Up Award Type

Cancel

Search Results

View 100 1-10 of 10

Award Type	Description
FSA	Fellowship-Schol Graduate
PCR	Prize/Contest/Recognition
RIG	Research/Intern Graduate
TGB	Training Grants - Books
TGD	Training Grants - Dependency
TGN	Training Grants - Non Degree
TGO	Training Grants - Other
TGS	Training Grants - Stipend
TGT	Training Grants - Travel
VSA	Travel Award Graduate

A Look at the Changes in GradStar



Service (HR, Payroll, Voucher) and Non Service (NS)

Award		Additional CFS	Item Type	Export Data	Audit Info											
*Award Type	Award Description	Fund	Source	Account	Funding Dept	Project ID	Program	Cost Code 1	Cost Code 2	Cost Code 3	Amount	Status	*Award Description	Include	% Total Stipend Award	
HCM	HCM Import	20101	12001	511170	390100						10000.02	Active		<input checked="" type="checkbox"/>	66.666700	+
2 FSA	Fellowship-Schol Graduate	29130	U023E		390100		EJ126				5000.00	Active	Royster Fellow	<input checked="" type="checkbox"/>	33.333300	+ -

- Added a fellowship, checked include button
- Percentage total stipend amount changed to reflect prorated amounts to prorate tuition/fees/insurance

Credit Hours

Total Bill Units	Actual Bill Units	Funding Pct
3.00	3.00	100

Total Instate	Fees	Remission Amt
2638.00	981.82	4431.50
Tuition/Fees Balance	Fees	Instate Remission Dates

Instate and Remission Funding

User Type: Dept User | [Instate Budget](#) | [Remission Budget](#)

Instate/Rem Department: 311500 | English and Comp Literature

Citizenship: US Citizen | Residency: NRES

[Degree Stipend Requirements](#) | [GradStar Student Lookup](#)

Fee Payments

Year Three (AY 2021-22): The Department pays 50% of Allowable and Non-allowable fees for students corresponding with their percentage of State supported stipends. The Graduate School and Provost pay 25% each of the remaining Allowable and Non-allowable fees corresponding with the percentage of State supported stipends. The Department pays for the Non-allowable fees corresponding with the percentage of Federal Grant supported stipends.

Comment:

- Added a fellowship to qualify for instate/remission awards
- Instate and remission amount is deducted from Dept User dept ID, in this example, 311500

Department Award/Student Payment

Award Type	Award Description	Fund	Source	Account	Funding Dept	Project ID	Program	Cost Code 1	Cost Code 2	Cost Code 3	Amount	Status	Award Description	Include	% Total Stipend Award
FSG	Fellowship-Schol Graduate	20130	12001		311500						9000.00	Active		<input checked="" type="checkbox"/>	100.000000

Instate (INS) and Tuition (TUI)

Award Type	Fund	Source	Account	Funding Dept	Project ID	Program	Cost Code 1	Cost Code 2	Cost Code 3	Amount	Status	Description	Instate Dept
Inst Tuit	20130	12001	568810	390100		EJ102				2638.00	Active	Instate Tuition	311500

Remission (REM)

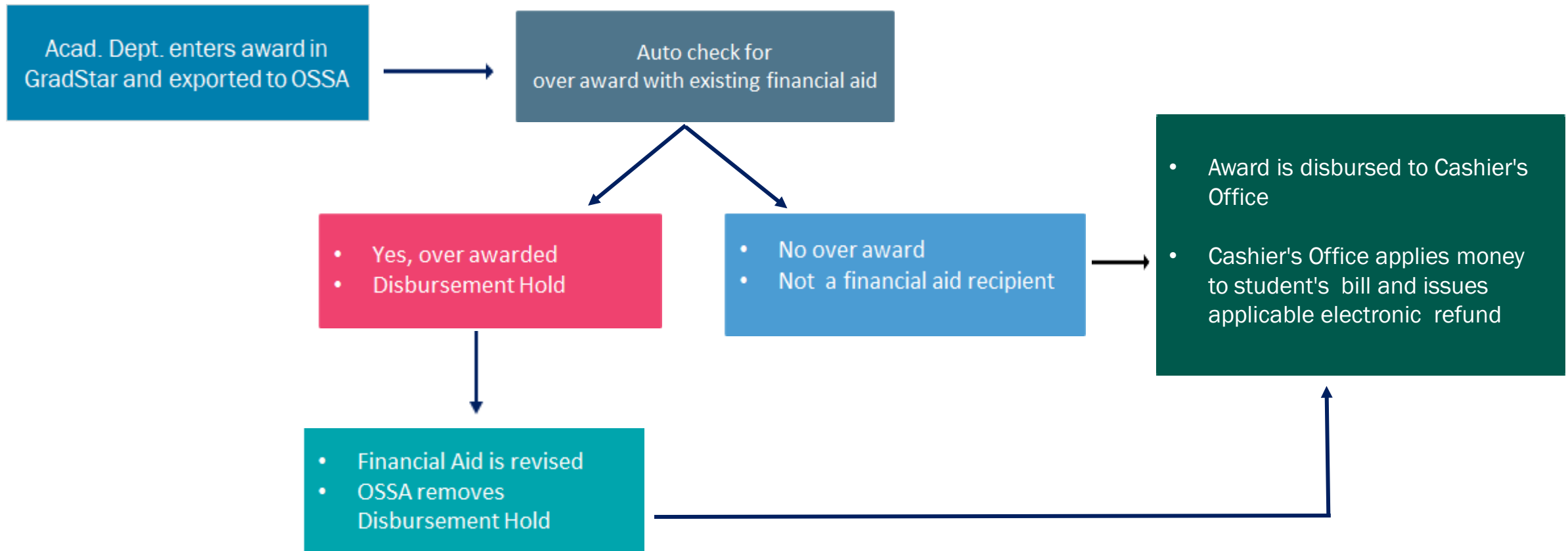
Award Type	Fund	Source	Account	Funding Dept	Project ID	Program	Cost Code 1	Cost Code 2	Cost Code 3	Amount	Status	Description	Rem Dept
Rem Tuit										4431.50	Active	Remission Tuiti	311500



How Does the Student Get Money?

Aesha Greene, Office of Scholarships and Student Aid

How Does the Student Get Money?



Disbursement occurs nightly:

- Fall ; M/W/F (Aug-Dec)

- Spring & Summer; T/Th (Jan -July)



Resources and Help

Beverly Wyrick, The Graduate School

Resources and Help – Understanding Student Payment Types



Payment Type	Financial Aid?	Payment Process	Student Account	Taxes
Employment Compensation Research Assistant, Teaching Assistant or Graduate Assistant positions held by students	No	Entered as payroll (ePAR) in ConnectCarolina. Monthly payments made directly to student.	N/A	Reported on W-2
Fellowships and Scholarships Paid to an individual to support the pursuit of study or research	Yes	Entered in GradStar by department	Pays outstanding charges on student account	Reported on 1098-T Taxes not withheld for US persons; may be withheld for non-US persons.
Training Grants An agreement that provides a coordinated training program for students; not compensation (no effort reporting)	Yes	Entered in GradStar by department	Pays outstanding charges on student account <i>*trainee book allowance, dependency, and travel payment types are Refund Only</i>	Reported on 1098-T Taxes not withheld for US persons; may be withheld for non-US persons.
Prizes/contests open to students only Ex: Honors Taylor Research Award , Innovate Carolina Award	Yes	Entered in GradStar by department	Refund Only	Reported on 1098-T Taxes not withheld for US persons; may be withheld for non-US persons.
Prizes/ contests open students, staff, faculty or public Ex: APPLES Service Learning Award in Honor of Ned Brooks	No	Entered as a voucher in ConnectCarolina, direct payment to student	N/A	May be subject to reporting on 1099-M or W-2 , Taxes not withheld for US persons; may be withheld for non-US persons.
Research studies and internships opportunities (UNC or external) Ex: Graduate School's Off Campus Dissertation Fellowship	Yes	Entered in GradStar by department	Refund Only	Reported on 1098-T Taxes not withheld for US persons; may be withheld for non-US persons.

Resources and Help – Understanding Student Payment Types



Payment Type	Financial Aid?	Payment Process	Student Account	Taxes
Travel for the student’s academic benefit Ex: attending or presenting at a professional conference; conducting fieldwork; and other research activities	Yes	Entered in GradStar by department	Refund Only	Reported on 1098-T Taxes not withheld for US persons; may be withheld for non-US persons.
Travel for University business Ex: attending an admissions recruitment event for the department	No	Entered in University’s travel system , direct payment to student	N/A	Not taxable
Reimbursement of expense Ex: a student purchases office supplies for their department from their own funds	No	Entered as a voucher in ConnectCarolina, direct payment to student	N/A	Not taxable
Reimbursement of expense for personal research project or similar Ex: an Art student required to create a project to graduate and is reimbursed for the supplies	Yes	Entered in GradStar by department	Refund Only	Reported on 1098-T Taxes not withheld for US persons; may be withheld for non-US citizens and non-Resident Aliens.

*Fellowships/Scholarships, Trainee Stipend, Trainee-Other and Trainee-Non-Degree award types pay against all outstanding charges on a student’s account, and if there is a credit balance, a refund is issued. “Refund only” payments are refunded to the student without paying against outstanding charges. However, if a student has received a loan, and receives a departmental award that causes the loan to be reduced, the university is required to repay the loan amount, and the student is required to repay the university any amount from that loan that had been refunded for living expenses. Any departmental award applied to the student’s account will be used to repay the loan amount that had been refunded and is now due back to the University, but no other outstanding charges.

**Notes on Taxes and Forms are applicable to US persons. Non-resident aliens and others may have withholding depending on the situation. Even if tax is not being withheld, please consult your personal tax accountant on whether a tax liability exists.

Resources and Help



List of Resources and Tools

- GradStar Training videos
- Student Payments Concepts and Policies Guide
- GradStar Step-by-Step Guide
- Understanding Student Payments Table
- Travel Payments for Students
- Calculator Tools
 - HR/Payroll Salary Calculator
 - Training Grant Payment Calculator
- FAQs
 - August 2021 Changes
 - Training Grant Changes
 - General GradStar FAQs (part of Student Payments Concepts and Policies Guide)

Resources and Help



- Contact the Office of Scholarships & Student Aid
 - aidinfo@unc.edu or ssa_graduate@unc.edu
 - Questions about the disbursement or refund of awards
 - Use the [OSSA Cost of Attendance & Aid Eligibility Calculator](http://studentaid.unc.edu) to determine adjustments to aid. (<http://studentaid.unc.edu>)
- Contact The Graduate School
 - gradstar@unc.edu
 - Questions about awards, tuition, fee and GSHIP policies
 - How to get access, help and training
 - Error messages in GradStar

***Only submit a ServiceNow ticket AFTER you have contacted
The Graduate School***

Questions and Contacts



- [Graduate School - GradStar | gradstar@unc.edu](mailto:gradstar@unc.edu)
- [Office of Scholarships & Student Aid | aidinfo@unc.edu](mailto:aidinfo@unc.edu)
- [Cashier's Office | funded@unc.edu](mailto:funded@unc.edu)
- [Office of Sponsored Research | ResAdminOSR@unc.edu](mailto:ResAdminOSR@unc.edu)



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