



# GradStar Step-by-Step

VERSION: 07/12/2021



---

## Table of Contents

---

GradStar Step-by-Step Guide .....	3
Finding Billing, Financial Aid, and Residency Information for a Student .....	4
Ordering Your Actions .....	7
Marking a Student Eligible to Receive Funding .....	8
Finding a Student in GradStar Maintenance .....	10
Setting Your Instate and Remission Department in GradStar Maintenance .....	11
Adding and Reviewing a Student's Funding Using GradStar Maintenance .....	12
Creating Tuition, Remission, and Fee Awards .....	14
Changing Awards: Deleting and Inactivating .....	18

---

# GradStar Step-by-Step Guide

Welcome to the GradStar Step-By-Step guide for those entering student payments into GradStar. The work that academic and student support staff do across campus is important work that enables students to study at UNC-Chapel Hill successfully. In this guide, you will learn:

- How to find student billing, Financial Aid, and Residency Information using GradStar Student Lookup.
- How to mark a student eligible to receive funding using GradStar Eligibility Selection.
- How to add funding to a student's account using GradStar Maintenance.
- How to make changes to funding you've entered using GradStar Maintenance.

## Companion Resources

### GradStar Concepts

The GradStar Concepts document has all the information you need to understand the why of entering student funding. It includes:

- definitions of common student payment terms,
- regulations and policies related to different award and payment types,
- insights into the potential impact of student payments entered into GradStar on the student's financial aid, and
- answers to the most frequently asked GradStar questions.

### The Graduate School

The Graduate School's [Funding](#) page has helpful information like:

- current account code information
- links to previous webinars about GradStar
- student funding and eligibility information
- a stipend calculator for HR reps entering service stipends into the HR system
- links to access forms, and
- where and how to get the right help.

---

## Finding Billing, Financial Aid, and Residency Information for a Student

Use GradStar Student Lookup to review a student's bio/demo, residency status, financials, billing, and academic program and plan information all in one place.

Follow these steps to view student information:

1. In ConnectCarolina, go to Student Admin Menu > GradStar > GradStar Student Lookup.
2. Enter appropriate criteria into the search fields, and then click the **Search** button.

Note: Academic Institution, Term, and Academic Career are required.

▼ Search Criteria		
Student ID	begins with ▼	<input type="text"/>
Academic Institution	begins with ▼	UNCCH
Term	begins with ▼	2219
Academic Career	= ▼	Graduate ▼
Academic Group	begins with ▼	<input type="text"/>
Academic Program	begins with ▼	<input type="text"/>
Academic Plan	begins with ▼	<input type="text"/>
Degree	begins with ▼	<input type="text"/>
Residency	begins with ▼	<input type="text"/>
Last Name	begins with ▼	<input type="text"/>

3. If you have multiple results, review the student and term information, and then select the record you need.

Result: The system displays the **Campus Community** tab for the student and specific term you selected.

<b>Campus Community</b>	Student Records	Student Financials	Financial Aid
-------------------------	-----------------	--------------------	---------------

### GradStar Campus Community Lookup

Student ID	700000001	Sample, Sally	<a href="#">GradStar Maintenance</a>	<a href="#">GradStar Eligibility</a>
------------	-----------	---------------	--------------------------------------	--------------------------------------

- Review bio/demo and residency information on the **Campus Community** tab.
- Click the **Student Records** tab, to review career, term, program, plan, and total billing units.

#### Student Records Data

Student Records Errors Exist? N

Career/Term Information			
Term	2219	Academic Career	GRAD
Approved Load	Full-Time	Eligible to Enroll	Y
Academic Load	F	Cumulative GPA	0.000
Academic Level - Projected	GM	Units Taken towards Acad Load	9.000
Academic Level - Term Start	GM	Student Career Nbr	0
Academic Level - Term End	GM	Primary Academic Program	SJMA

Program/Plan Information			
Career	Graduate	Student Career Nbr	0
Program	SJMA	Academic Group	SOJ
<b>Plan</b>			
Plan	MAMECO	Type	Major
		Degree	MA
<b>Org/Dept Info</b>			
Academic Organization		Department	
MEJO		350100	

Total Billing Units for Student	9.00
---------------------------------	------

- Click the **Student Financials** tab, to review prepayments.

- Click the **Financial Aid** tab, to review disbursement plan information and to see if any financial aid errors exist.

Financial Aid Information	
FA Errors Exist?	N
Disbursement Plan found	
Disbursement plan information	
Aid Year	2022
Career	Graduate
Prim Prog	SJMA
Acad Plan	MAMECO
Acad Level	Grad Mast
Disb plan seq number	1
Disbursement Plan	FS Standard GNC Fall/Spr

- If you would like to make the student eligible for student payments in GradStar, click the **GradStar Eligibility Selection** link.

Financial Aid
<a href="#">GradStar Maintenance</a> <a href="#">GradStar Eligibility Selection</a>

- If you would like to add payments in GradStar or review the student's payments in GradStar, click the **GradStar Maintenance** link.

Financial Aid
<a href="#">GradStar Maintenance</a> <a href="#">GradStar Eligibility Selection</a>

---

# Ordering Your Actions

## Entering Funding

When adding funding to a student through GradStar, order matters. Follow the steps in the order listed to successfully add funding to a student's account as needed. To understand the processes, policies, and regulations behind these steps, refer to the GradStar Concepts document on The Graduate School's [Funding](#) page.

### 1. Mark a Student Eligible to Receive Funding

A student must first be marked eligible for the specific term before they can receive non-service, in-state tuition, remission, and fee awards. For step-by-step instructions, refer to *Marking a Student Eligible to Receive Funding*, page 8.

### 2. Find the Student in GradStar Maintenance

For step-by-step instructions, refer to *Finding a Student in GradStar Maintenance*, page 10.

### 3. Set Your Department in GradStar Maintenance

Make sure you're using the correct department's tuition and remission funds. For step-by-step instructions, refer to *Setting Your In-state and Remission Department in GradStar Maintenance*, page 11.

### 4. Add Non-Service Stipends or Review HR Stipends and Vouchers

A student's stipend must meet the stipend minimum for their program. For step-by-step instructions for adding or reviewing student funding, refer to *Adding and Reviewing a Student's Funding Using GradStar Maintenance*, page 12.

### 5. Add Funds to Pay a Student's Tuition and Fees

Once a student has a stipend that meets the minimum requirement, you can add funding for tuition and fees. If the student is not a resident and you have remission budget available, you can create a remission award that's paid for by The Graduate School. For step-by-step instructions, refer to *Creating Tuition, Remission, and Fee Awards*, page 14.

## Changing Funding

When changing a student's funding through GradStar, timing matters. For step-by-step instructions, refer to *Changing Awards: Deleting and Inactivating*, page 18.

---

## Marking a Student Eligible to Receive Funding

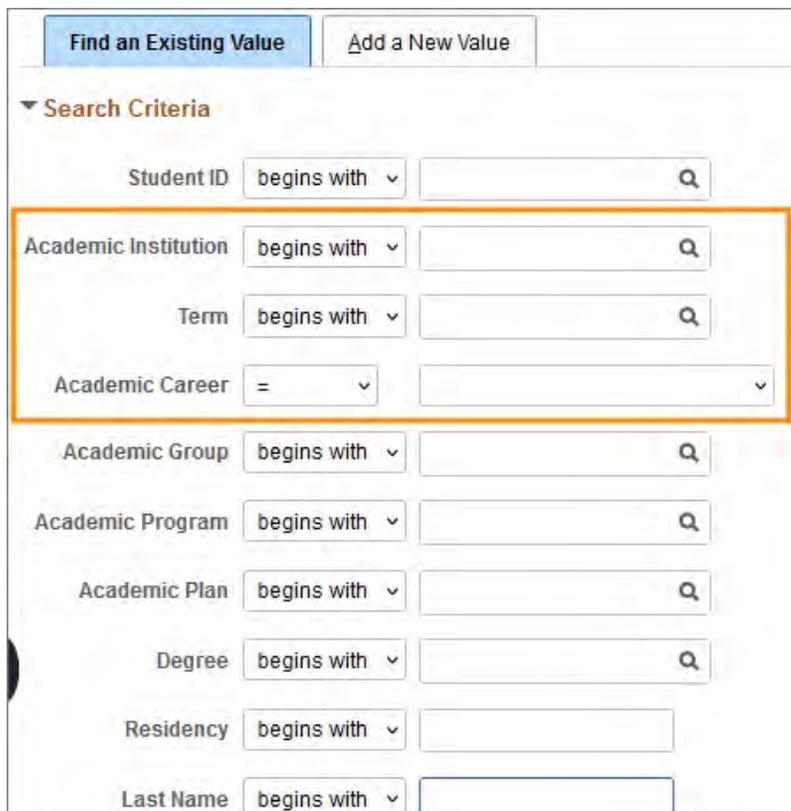
Marking a student eligible for the specific term you want to enter funding for, is a required before you can enter any funding in GradStar. For detailed information about student funding and eligibility, go to The Graduate School's [Funding](#) page.

Follow these set a student's eligibility for departmental awards:

1. In ConnectCarolina go to your Admin WorkCenter page, and then click the **Student Admin WorkCenter** tile.
2. Click **GradStar / GSHIP** from the menu on the left-hand side to show the related menu options, then click **GradStar Eligibility Selection**.



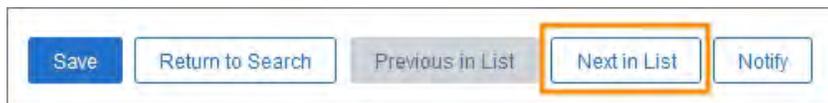
3. Enter the required fields: Academic Institution, Term, and Academic Career. Add any additional search criteria as appropriate.

A screenshot of a search criteria form. At the top, there are two buttons: 'Find an Existing Value' (highlighted in blue) and 'Add a New Value'. Below the buttons is a section titled 'Search Criteria' with a downward-pointing arrow. The form contains several search criteria, each with a dropdown menu for the operator and a text input field with a search icon. The criteria are: Student ID (operator: begins with), Academic Institution (operator: begins with), Term (operator: begins with), Academic Career (operator: =), Academic Group (operator: begins with), Academic Program (operator: begins with), Academic Plan (operator: begins with), Degree (operator: begins with), Residency (operator: begins with), and Last Name (operator: begins with). The 'Academic Institution', 'Term', and 'Academic Career' rows are highlighted with a red rectangular border.

- 
4. Click the **Search** button.
  5. If you have multiple results, click the row for the student and term you need.
  6. Check the **Departmental Award?** checkbox.



7. Click the **Save** button.
8. If you have more students to mark eligible, you can use the **Next in List** button to move to the next search result.



9. After you've marked a student eligible, you can refer to *Finding a Student in GradStar Maintenance*, page 10.

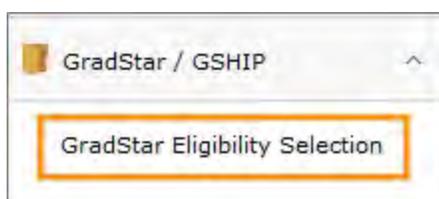
---

## Finding a Student in GradStar Maintenance

**Prerequisite:** The student is marked eligible for a department award. Refer to *Marking a Student Eligible to Receive Funding, page 8* for step-by-step instructions.

Follow these steps to get to a student's GradStar record for a specific term.

1. In ConnectCarolina go to your Admin WorkCenter page, and then click the **Student Admin WorkCenter** tile.
2. Click **GradStar / GSHIP** from the menu on the left-hand side to show the related menu options, and then click **GradStar Eligibility Selection** .



3. Enter Academic Institution, Term, Academic Career and any other criteria to limit your search results, and then click the **Search** button.

Note: To see a list of all of the award-eligible students in your department, type your department number into the Department field, leave the Student ID (PID) field blank, then click the **Search** button.

4. If you have multiple results, click the appropriate record.

Term	Academic Career	Department	Academic Group	Academic Program	Academic Plan	Aid Year	Degree	Resider
2219	Graduate	350100	SOJ	SJMA	MADGCM	2022	MA	RES
2219	Graduate	350100	SOJ	SJPHD	PHDMECO	2022	PHD	RES
2219	Graduate	350100	SOJ	SJMA	MAMECO	2022	MA	RES

Note: If you search by PID, the search results include all academic terms that the student has been active. Select the row for the student you want to add or review funding for.

---

## Setting Your Instate and Remission Department in GradStar Maintenance

Once you're on the GradStar Maintenance page for the correct student and term, follow these steps to make sure you're using the correct department's tuition and remission funds.

1. In the Remission Funding box, select **Dept User** from the User Type drop-down menu.
2. In the **Instate/Rem Department** field, type in or search for your department number.



The screenshot shows a form titled "Instate and Remission Funding". It contains two main input fields. The first is a dropdown menu labeled "User Type" with the value "Dept User" selected. The second is a text input field labeled "Instate/Rem Department" containing the number "350100". A search icon is visible to the right of the text input field. The "350100" text is highlighted with an orange box.

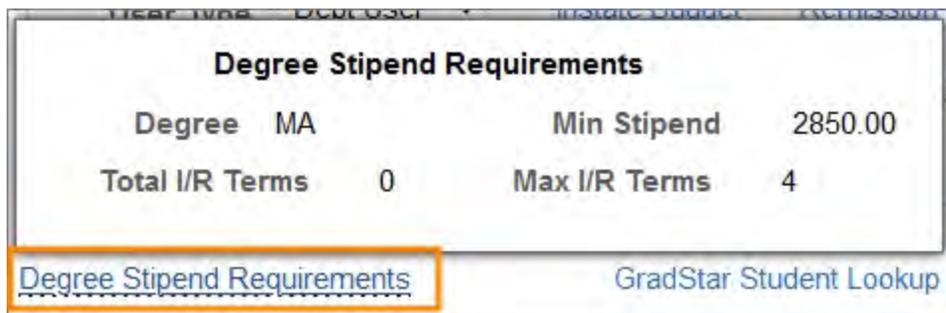
---

## Adding and Reviewing a Student's Funding Using GradStar Maintenance

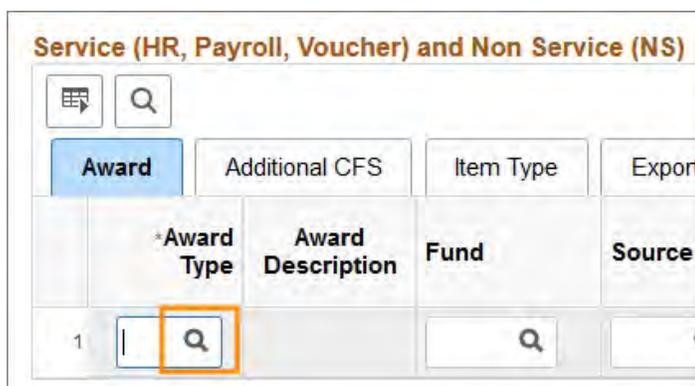
In the Service (HR, Payroll, Voucher) and Non Service (NS) section, you can see many types of funding. Some of the funding in this section is read only, because it can only be created in other systems. For example, service stipends are entered into the HR/Payroll system and can only be changed there. You can add several types of funding to a student's account in GradStar by following the steps below.

**Prerequisite:** The student is marked eligible for a department award. Refer to *Marking a Student Eligible to Receive Funding*, page 8 for step-by-step instructions.

1. Check the minimum stipend amount by hovering your mouse over **Degree Stipend Requirements**. Take note of this amount because you'll use it later.



2. In the Service (HR, Payroll, Voucher) and Non Service (NS) section, choose the type of award you need in the **Award Type** field.



3. Enter the fund, source, funding dept, and Amount, along with any other chartfields needed.

**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	Amount
1	RIG <input type="checkbox"/>	Research/Intern Graduate	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	1425.00

- If you want the funding in a row to count toward the stipend minimum for the student, check the **Include** checkbox.

Amount	Status	Award Description	Include	% Total Stipend Award		
1425.00	Active	<input type="checkbox"/>	<input checked="" type="checkbox"/>	50.000000	<input type="checkbox"/>	<input type="checkbox"/>
1425.00	Active	<input type="checkbox"/>	<input checked="" type="checkbox"/>	50.000000	<input type="checkbox"/>	<input type="checkbox"/>

Result: The % Total Stipend Award column updates.

- If you need to add an additional award type or source, click the **add a new row** button and repeat the steps above.

Include	% Total Stipend Award		
<input checked="" type="checkbox"/>	50.000000	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	50.000000	<input type="checkbox"/>	<input type="checkbox"/>

- Repeat step 1 to check the minimum required stipend and ensure the total of the amounts you have entered meets or exceeds the required minimum stipend.
- Click the **Save** button at the bottom of the page.
- Refer to *Creating Tuition, Remission, and Fee Awards*, page 14 to add tuition and fee support for this student.

---

## Creating Tuition, Remission, and Fee Awards

Prerequisites:

- The student is eligible for a department award for the term. Refer to *Marking a Student Eligible to Receive Funding*, page 8 for step-by-step instructions.
- The Graduate School's minimum stipend requirement is met. Refer to *Adding and Reviewing a Student's Funding Using GradStar Maintenance*, page 12 for step-by-step instructions for entering a stipend.

Follow these steps to create tuition, remission, and fee awards:

1. Go to GradStar Maintenance and find the student's record for the term. Refer to *Finding a Student in GradStar Maintenance*, page 10 for step-by-step instructions.
2. Select your Remission Department. Refer to *Setting Your Instate and Remission Department in GradStar Maintenance*, page 11 for step-by step instructions.
3. Confirm that the number in the **Actual Bill Units** field equals the number of credit hours you expect the student to be enrolled in for the term. If you need to adjust the hours, you can type a number directly into the **Actual Bill Units** field.

Summary and Requirements Data		
<b>Credit Hours</b>		
Total Bill Units	Actual Bill Units	Funding Pct
12.00	12.00	100
Total Instate	Fees	Remission Amt
7442.50	987.82	8283.50
<a href="#">Tuition/Fees Balance</a>	<a href="#">Fees</a>	<a href="#">Instate Remission Dates</a>

Result: The Total Instate, Fees, and Remission Amt totals change when you click out of the field..

4. If the student is in a terminal master's or free-standing degree, you can set a funding percentage that the department plans to cover for the student. Select the percentage in the **Funding Pct** box. The options are: 100%, 75%, 50% and 25%.

**Summary and Requirements Data**

**Credit Hours**

Total Bill Units	Actual Bill Units	Funding Pct
12.00	3.00	100

Result: The system recalculates the amount of existing tuition awards to reflect the change, but be aware the amount doesn't actually change until it's saved.

- If the student is a non-resident of North Carolina for tuition purposes, you can use the remission budget for your department, granted by The Graduate School, to pay the difference between resident and non-resident tuition. To see how much remission budget you have, hover your cursor over the **Remission Budget** link.

**Remission Budget**

Operid Deptid: 350100 School of Jc

Remission Budget: 20

Remission Balance: 20

[Remission Budget](#) Year Three (AY 2021- fees for students corr

- Click the **Create Instate/Remission Awards** button at the top of the page.

[Create Instate/Remission Awards](#)

Result: GradStar adds rows to

- The Instate (INS) and Tuition (TUI) section and distributes instate tuition at the same percentage across the chartfields that the student is receiving Service or Non-Service funding from.
- The Remission (REM) section using The Graduate School's chartfield string if remission budget is available.
- The Fees (FEE) section for allowable and non-allowable fees.

Note: If there are amounts in the tuition and fees sections, clicking the **Create Instate/Remission Awards** button adjusts those rows. If the button isn't available, you will need to adjust the amounts manually.

- Verify that the Instate Tuition chartfields and amounts are correct. If any changes are needed, you can type directly in the fields to make changes.

**Instate (INS) and Tuition (TUI)**

	Award Type	Fund	Source	Account	Funding Dept	Amount
1	Inst Tuit	29201	51900	568810	350100	5276.00

Note: The account field is set by the system and cannot be changed.

- If you are splitting the tuition between departments, click **Add a New Row** and enter the amount and chartfield.

Amount	Status	Description	Instate Dept		
2638.00	Activ	Instate Tuition		+	-

Note: The total of the two lines must be less than or equal to the student's resident tuition amount. If the total tuition is greater than the student's resident tuition amount, you will receive an error when you try to save.

- Verify that the Remission amount and department are correct. If the department is not correct, refer to *Setting Your Instate and Remission Department in GradStar Maintenance, page 11* for instructions to change your department. Then use the **Create Instate/Remission Awards** button to regenerate the chartfields and amounts for tuition, remission, and fees.

**Remission (REM)**

	Award Type	Fund	Amount	Status	Description	Rem Dept	
1	Remission		8283.50	Active	Remission Tuiti	350100	-

Note: The chartfield for remission fills in automatically if remission budget is available.

10. Verify that the Fee information is correct.

**Fees (FEE)**

1-2 of 2

	Award	Additional CFS	Item Type	Exp					
	Award Type	Fund	Source	Acc	Amount	Status	Description		
1	Allowabl	29201	51900	568	612.11	Active	Not-State Allow	+	-
2	Non-Allo	29201	51900	568	375.71	Active	NotState NonAll	+	-

11. Click the **Save** button at the bottom of the page.



12. If you need to delete, inactivate, or make changes to awards, refer to *Changing Awards: Deleting and Inactivating*, page 18 for step-by-step instructions.

---

## Changing Awards: Deleting and Inactivating

If you need to change an award that has already been entered, you remove the incorrect funding first by doing one of the following:

- If you're removing or changing an award on the same day you entered it, then the award isn't exported yet. Therefore, you can delete non-service stipend, tuition and remission awards for students on the GradStar Maintenance page. If you want to increase or decrease funding, add a new row.
- If the award has already been exported, make the existing award Inactive to remove the award from the student's account.

After you delete or inactivate the award of the incorrect amount, you can add a new row with the correct amount. The correct amount is the full amount of the total award received by the student for that chartfield. You do not need to enter the difference between the deleted or inactivate award and the newly entered award anywhere.

Note: Changes to service stipends are made in the HR system and are only read-only in GradStar.

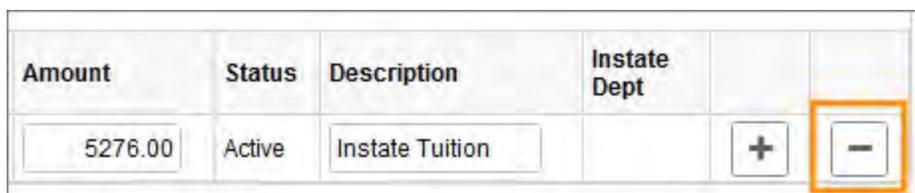
### Changing an Award

1. Find the student in GradStar Maintenance. Refer to *Finding a Student in GradStar Maintenance*, page 10 for step-by-step instructions.
2. Make sure your department is listed in the remission department field. Refer to *Setting Your Instate and Remission Department in GradStar Maintenance*, page 11 for instructions.

### Deleting an Award the Same Day It's Entered

1. Click the **Delete** (minus sign) button on the row with the award to be deleted.

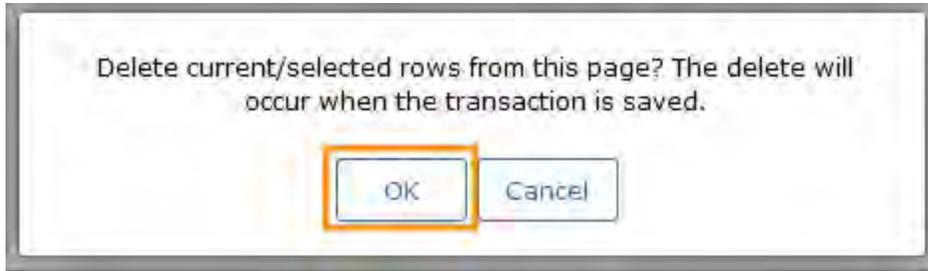
Note: If the delete button is grayed out, you can't delete the award. Try clicking the Save button to see if the delete button becomes available.



The image shows a table with five columns: Amount, Status, Description, Instate Dept, and an action column. The first row contains the values: 5276.00, Active, Instate Tuition, and an empty Instate Dept field. The action column contains a plus sign button and a minus sign button. The minus sign button is highlighted with an orange border.

Amount	Status	Description	Instate Dept	
5276.00	Active	Instate Tuition		+ -

2. Click **OK** to confirm deleting the award.

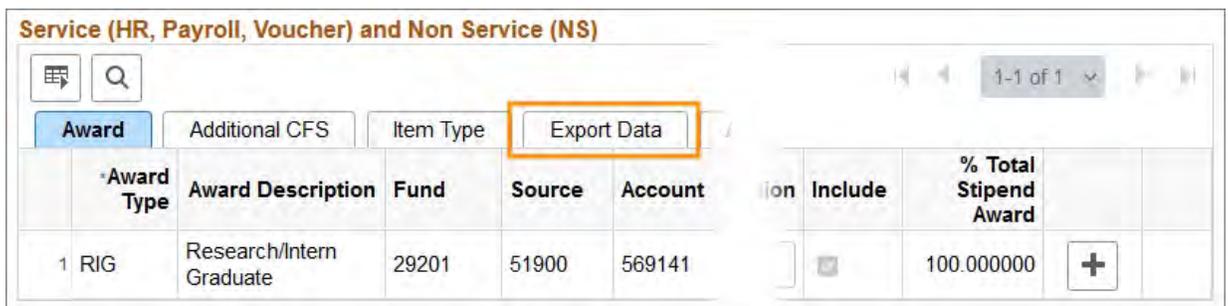


3. Click the **Save** button.
4. If needed, enter the updated award amount and chartfield string into the new row. Depending on what you're changing, refer to one of these for detailed instructions:
  - *Adding and Reviewing a Student's Funding Using GradStar Maintenance, page 12*
  - *Creating Tuition, Remission, and Fee Awards, page 14*

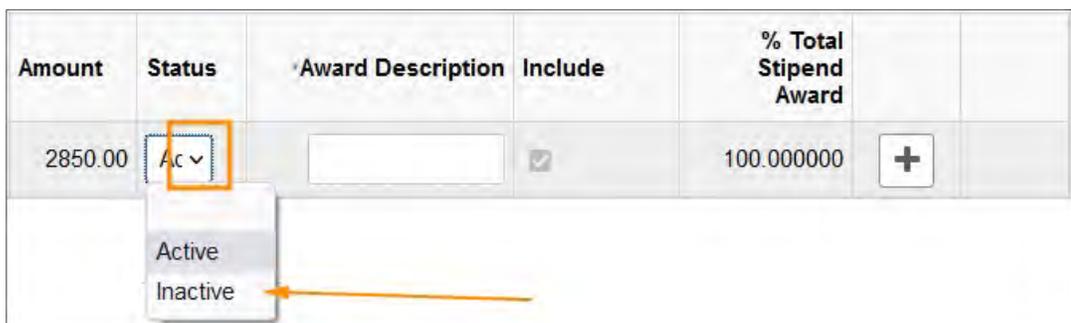
### Inactivating an Award

Follow these steps to inactivate an award.

1. Look at the funding rows you want to change. If the **Delete** (minus sign) button is not available, the award has already been exported. You can verify this by clicking on the **Export Data** tab.



2. On the Award tab, expand the Status drop-down menu, and then select **Inactive**.



---

Result: If you're adjusting an amount included in the stipend, the amount in the % Total Stipend Award changes immediately.

3. Click the **Add a New Row** icon.



A screenshot of a table interface. At the top, there is a pagination control showing '1-1 of 1'. The table has two columns: 'Include' and '% Total Stipend Award'. The first row shows a checked checkbox and the value '100.000000'. A plus sign icon in a square box is highlighted with an orange border in the third column of the first row.

Include	% Total Stipend Award	
<input checked="" type="checkbox"/>	100.000000	+

Note: If you're entering an increased award, the total amount you want the student to receive for the semester. If you have any questions, refer to The Graduate School's [funding page](#) to see where you can get help.

4. Click the **Save** button at the bottom of the page.



5. If needed, enter the updated award amount and chartfield string into the new row. Depending on what you're changing, refer to one of these for detailed instructions:
  - *Adding and Reviewing a Student's Funding Using GradStar Maintenance, page 12*
  - *Creating Tuition, Remission, and Fee Awards, page 14*