# 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.

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.
4. Review bio/demo and residency information on the Campus Community tab.

5. Click the **Student Records** tab, to review career, term, program, plan, and total billing units.

6. Click the **Student Financials** tab, to review prepayments.
7. Click the **Financial Aid** tab, to review disbursement plan information and to see if any financial aid errors exist.

![Financial Aid Information](image)

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

![GradStar Maintenance and Eligibility Selection](image)

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

![GradStar Maintenance and Eligibility Selection](image)
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, instate 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 Instate 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

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.
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.

![Selection of Eligible Student](image)

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.

![Button Interface](image)

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.

   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.

![Instate and Remission Funding](image-url)
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.

![Degree Stipend Requirements](image1)

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

![Service (HR, Payroll, Voucher) and Non Service (NS)](image2)

3. Enter the fund, source, funding dept, and Amount, along with any other chartfields needed.
4. If you want the funding in a row to count toward the stipend minimum for the student, check the **Include** checkbox.

Result: The % Total Stipend Award column updates.

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

6. 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.

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

8. 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.

   ![Credit Hours Table]

   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%.
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.

5. 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.

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

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.
7. 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.

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

9. 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.

Note: The chartfield for remission fills in automatically if remission budget is available.
10. Verify that the Fee information is correct.

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 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.

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.

![Image of Add a New Row](image)

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.

![Save Button](image)

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*