CHANGES TO STUDENT AWARD PAYMENTS FOR VOUCHER PREPARERS

July 20, 2021

Beverly Wyrick, Director of Finance and Administration, The Graduate School
Aesha Greene, FAAC, Office of Scholarships & Student Aid
Janet Rupert, Director, Accounts Payable and Vendor Services
Amanda Chang, Assistant Director, Office of Sponsored Research
Moderator Rebecca Jones, ITS Change Management
• Use the Q&A feature to ask questions

• Questions will be addressed at the end of the presentation

• The webinar is being recorded

• The recording and answers to questions will be posted on the ConnectCarolina User Info website: https://ccinfo.unc.edu/
Today’s Agenda

• How Students Receive Money
• Accounts Allowed and Not Allowed
• Some Scenarios: Student Awards Paid by Voucher
• Recap and Q & A
How Students Receive Money

Aesha Greene, FAAC, Office of Scholarships & Student Aid
Beverly Wyrick, Director of Finance and Administration, The Graduate School
Amanda Chang, Assistant Director, Office of Sponsored Research
If the person is a UNC-matriculated student and they receive a payment for their academic benefit, then it’s financial aid.

As of August 2, no financial aid payments can be paid to a UNC-matriculated student by voucher. They must be paid through GradStar.
To ensure UNC-CH is compliant with federal and state regulations:

• All monies paid to support students are considered financial aid, unless they are:
  • compensation for work performed or
  • reimbursement of travel on behalf of the University.

• All financial aid payments must be coordinated with other aid a student receives.
  • Students receiving state, federal or need-based institutional funding may not receive total aid that exceeds the cost of attendance.
Where the $ comes from doesn’t matter. If the money benefits the student’s education, it’s financial aid.
Visit The Graduate School’s website to find a chart that provides details about each type of payment and how it’s paid.

<table>
<thead>
<tr>
<th>If you are paying the student ...</th>
<th>Then use this system ...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Awards, stipends, training grants, or any other type of financial aid</td>
<td>GradStar</td>
</tr>
<tr>
<td>For work performed (like research assistant or teaching assistant)</td>
<td>HR/Payroll</td>
</tr>
</tbody>
</table>

*For other payments, let’s go to the next slide ...*
It’s Okay to Pay a Student with a Voucher if …

• The payment is an award or prize for a contest open to the public or to faculty and staff.
• You are reimbursing or prepaying for work on behalf of the University.
• You are reimbursing the student for travel on behalf of the University (primarily benefiting the University, not the student).
  • Examples: Making a trip to the airport to pick up a visitor to the department or attending a student recruitment event on behalf of the department.
It’s Okay to Pay a Students with a Voucher if ...

- The student is **not** enrolled at UNC.
- Complete the *Student Certification for Voucher Payment* form (form 706.1.f on updated finance procedure 706.1) and attach it to the voucher.
- It’s the student’s responsibility to report it as aid to their University.
- If the non-enrolled student is on UNC payroll, the payment should be made through the Payroll system instead.
- A recent graduate should be paid through GradStar if the payment is for academic support for the previous semester.
- Non-enrolled students should be entered in the affiliate system (Campus Solutions or PID office) and need a supplier ID in Campus Supplier to be paid by voucher.
  - In Campus Supplier, the PID should be entered when requesting the supplier ID.
  - Select affiliate at the dropdown.
## A Note About Training Grants

<table>
<thead>
<tr>
<th>Paying Student ...</th>
<th>System ...</th>
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- To meet the UNC-CH stipend limit, it’s possible that a student/trainee will be paid their full stipend via both GradStar and HR/Payroll.

**ServiceNow Form for OSR-Help (coming soon).** When student/trainee’s appointment end-date exceeds the project end-date, request a KK date extension on the project before you enter in GradStar to ensure the payment posts to the project CFS and not suspense.

Coming Soon to the OSR website – Guidance for Training Awards and GradStar:  
[www.research.unc.edu/sponsored-research/resources/training-awards](http://www.research.unc.edu/sponsored-research/resources/training-awards)
If you need to provide a training grant payment to a student that was meant for summer 2021:

- After August 2, the payment will need to be entered in GradStar.
- The award type option will be “non-service” – the only award type available before the August 2 go-live.
- Enter the payment in the summer session in which the student is registered.
  - If the student was registered in both sessions, choose one of them.
  - If the student was registered in only one session, choose that session.
  - If the student was not registered for summer 2021, enroll them in the placeholder course first, then enter the GradStar award.
- Coming soon: Instructions on how to enter a student in the placeholder course will be on The Graduate School's website.
Accounts
Allowed and Not Allowed

Janet Rupert, Director, Accounts Payable and Vendor Services
Some Accounts No Longer Allowed in Vouchers

• 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.

• You can find the list of accounts that are no longer allowed on the [Finance website](#).
## Accounts NOT Allowed in AP

<table>
<thead>
<tr>
<th>Account</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>568110</td>
<td>Scholarship-Non Service State</td>
</tr>
<tr>
<td>568120</td>
<td>Fellowship-Non Service State</td>
</tr>
<tr>
<td>568510</td>
<td>Scholarship-Teachers</td>
</tr>
<tr>
<td>568610</td>
<td>Grant-Medical/Dental Minority</td>
</tr>
<tr>
<td>568710</td>
<td>Traineeships-Degree Stipend</td>
</tr>
<tr>
<td>568720</td>
<td>Traineeships-Dependent Allow</td>
</tr>
<tr>
<td>568730</td>
<td>Traineeships-Tuition</td>
</tr>
<tr>
<td>568731</td>
<td>Traineeships Fees-Grants Allow</td>
</tr>
<tr>
<td>568732</td>
<td>TraineeshipsFee-Fed Grant Unallow</td>
</tr>
<tr>
<td>568740</td>
<td>Traineeships-Book Allowance</td>
</tr>
<tr>
<td>568750</td>
<td>Traineeships-Travel</td>
</tr>
<tr>
<td>568760</td>
<td>Traineeships-Other</td>
</tr>
<tr>
<td>568770</td>
<td>Traineeships-Non Degree</td>
</tr>
<tr>
<td>568780</td>
<td>Traineeships-Clinical Fellow</td>
</tr>
<tr>
<td>568790</td>
<td>Traineeships-Carryover Un Fds</td>
</tr>
<tr>
<td>568810</td>
<td>Tuition-Graduate Assistant</td>
</tr>
</tbody>
</table>

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<tr>
<td>568910</td>
<td>Scholarship-UNC Program</td>
</tr>
<tr>
<td>568940</td>
<td>Fellowship-Non Qualified Ed</td>
</tr>
<tr>
<td>569110</td>
<td>Scholarship-Academic Enhance</td>
</tr>
<tr>
<td>569134</td>
<td>Fellowship-Schol Undergrad</td>
</tr>
<tr>
<td>569135</td>
<td>Fellowship-Schol Graduate</td>
</tr>
<tr>
<td>569140</td>
<td>Research/Intern Undergrad</td>
</tr>
<tr>
<td>569141</td>
<td>Research/Intern Graduate</td>
</tr>
<tr>
<td>569144</td>
<td>Travel Award Undergraduate</td>
</tr>
<tr>
<td>569145</td>
<td>Travel Award Graduate</td>
</tr>
<tr>
<td>569150</td>
<td>Scholarship-Forfeit Tuition</td>
</tr>
<tr>
<td>569160</td>
<td>Fellowship-Forfeit Tuition</td>
</tr>
<tr>
<td>569175</td>
<td>CARES_HEERF_Student_Emerg_Aid</td>
</tr>
<tr>
<td>569180</td>
<td>Fellowship-Non Serv Non St</td>
</tr>
<tr>
<td>569190</td>
<td>Awards-Student</td>
</tr>
<tr>
<td>569191</td>
<td>Awards-Non-UNC Student</td>
</tr>
</tbody>
</table>
• Other accounts will begin triggering a pre-audit review to ensure that no financial aid for UNC students is being paid by voucher.

• Whether a payment is financial aid is not always immediately clear from the voucher.

  ➢ You may find that more vouchers are returned to you with questions or requests for more documentation.
Examples of Accounts Now Going Through Pre-Audit

- Honoraria: 522810 and 522820
- Non instructional services: 522922 and 522923
- Participant stipends: 569311 and participant expenses 569312
- Study subject accounts: Study subject payments 523150 and study subject expenses 523160
- Educational awards for non-enrolled students 558430
  - Identify your non-enrolled students by attaching the non-enrolled student certification form (see policy 706 and AP website)
  https://finance.unc.edu/forms/706-1-1f/
Accounts have been overused or misused. Follow this guidance:

- **569311**: Payments to non-student, non-service participants in workshops, seminars, conferences, summer institutes, etc. This account is not for student financial aid or study subjects.
- **569312**: Payments to non-student, non-service participants in workshops, seminars, conferences, summer institutes, etc. for transportation and subsistence expense incurred during the program. This account is not for student financial aid or study subjects.
- When paying individuals for study subjects, use new accounts
  - 523150 – study subject payments
  - 523160 – study subject expense
- When paying non-enrolled students for working on summer (and other) projects, use 558430

*569311 and 569312 should be rarely used!!!!!!*
Some Scenarios

Janet Rupert, Director, Accounts Payable and Vendor Services
2021 UNC Faculty & Medical Student

COVID-19 Research and Service Learning Internships

December 17, 2020

Dear [Name],

Congratulations! We are pleased to offer you the 2021 Global Health Internship. Based on your interests and skills, you will be working with the Nicaragua COVID study with [name]. We feel that this remote global health involvement will provide you with a unique opportunity to use and further develop your skills as a health professional. We are confident that you will make great contributions to ongoing COVID-19 studies.

For questions related to your start date, scope of work for your learning agreement, please contact [name] as soon as possible.

Your involvement in the Nicaragua COVID study is contingent on the study environment remaining a safe and acceptable place determined by UNC SOM leadership and the PI. Until further notice, UNC Students are NOT permitted to travel outside of the state of NC or outside of the U.S. for UNC-related activities.

By January 4, 2021: Please read, initial, and return this signed award agreement to [name] and your project faculty. Then, submit documentation listed below to directly in order to process your award.

Upon receiving your signed agreement and requested documents, I will schedule a meeting with you to discuss funding for your internship and potential for academic credit in GLBE151 for the summer term.

The [name] has agreed to fund the student based on the faculty's proposal. Your funding will be approximately $2,000.
MEMORANDUM
DATE: December 17, 2020
TO: UNC Disbursement Services

This voucher was created to pay [redacted] for her participation in the IMPACT Internship Program. This program is funded by the Burroughs Welcome Foundation and allows students in laboratory settings an opportunity to explore working opportunities outside of the laboratory environment. This program is operated by [redacted], Director of Career Development and Training, in the Office of Graduate Education.

[redacted] completed a total of 160 hours in the duration of his internship and is being paid at a rate of $18.75/hr.

If you have any questions about any expenses outlined here, please do let me know.

Thanks,

[redacted]
Program Administrator
Office of Graduate Education, UNC School of Medicine

130 Mason Farm Road, CB 7108
Chapel Hill, NC 27599-7108
Example Three

Invoice Number: [Redacted]

Vendor: [Redacted]

Invoice Date 4/20/21

Description: In recognition of their work during the spring semester, participating as a facilitator for the PPE in a Time of Pandemic series, the Department of Philosophy PPE Program would like to award a participation stipend to the vendor for their involvement in PPE Undergraduate Reading Groups.

4/20/2021 – Participation Stipend - $2400.00

Details found here:

https://ppe.unc.edu/ppetp/

Total: $ 2400.00
May 5, 2021

To Whom It May Concern:

The MURAP 2021 Summer Program will begin on Monday, May 24th and end on Wednesday, July 28th. There are 20 students in this year’s cohort: the full list of participants’ names is located below. Each student is provided with a $3,500 stipend for successful completion of the program. The funds are distributed in three payments. The first check, consisting of one-third of the stipend ($1,200), will be distributed on Monday, May 24th. The second check ($1,100) will be distributed on Monday, June 21st. The final check ($1,300) will be distributed on Wednesday, July 28th.

2021 Participants:

Sincerely,
April 27, 2021

Dear Irena:

We are pleased to offer you a Research Assistantship for Summer 2021. This assistantship will provide $5760 in stipend. You will be expected to work 40 hours per week, for the duration of your appointment, from May 15, 2021 through August 13, 2021.

You will contribute to research in the Visual Analytics and Communication Lab. You will participate in weekly lab meetings, contribute to data management activities, help with software design and development, and help run user studies. Your direct supervisor will be [Name].

A student receiving any type of University and/or School support must maintain full-time enrollment for the duration of each academic semester for which aid is awarded. Summer semesters are not included.

It is an expectation that you meet the duties/responsibilities of the assignment as your supervisor outlines them. If you choose to end your temporary appointment prior to the scheduled end date, you are required to provide prompt written notification to the SILS human resources manager to avoid overpayment and subsequent collection of debt.

We hope you will accept this offer. Please sign and return the signature page indicating your decision to accept or decline the assistantship by May 11. In addition, please contact [Name] to fill out remaining HR documents. Your start date and stipend are contingent upon your timely completion of all hiring documents.

If you have any questions or concerns about this assistantship award, please contact me at 919-962- [Name]. Congratulations on being selected for a Research Assistantship.

Sincerely,
May 20, 2021

Disbursement Services
UNC Chapel Hill

Re: McNair Stipends for Summer 2021

To Whom It May Concern,

Each year, the Ronald E. McNair Scholars Program at The University of North Carolina at Chapel Hill provides services to 26 academically talented undergraduate students at Carolina to support their pursuit of graduate school. To be eligible for these services, these students must be of the first generation in their families to obtain a Bachelor’s degree and meet low-income requirements as designated by the United States Department of Education, or belong to an otherwise underserved or underrepresented population in graduate education.

As part of the McNair Program services, students can earn up to $3,200 over the course of the summer, paid out in two installments, which corresponds to their attendance at Graduate Record Examination (GRE), Research Writing, and Graduate Application courses, and their completion of graduate portfolio and research project assignments. Thus, this letter serves as verification that program participants in the Ronald E. McNair Post Baccalaureate Achievement Program (McNair Scholars Program), pursuant to the McNair grant, will receive stipends for participation in the McNair Scholars Program for Summer 2021. Services will be provided from June 1, 2021 until July 23, 2021.

Thank you,
March 22, 2021

Thank you for applying to the 2021 Research Student Fellowship. We are pleased to notify you that you have been selected to participate in our inaugural cohort this summer.

As a Research Student Fellow, you will join a community of interdisciplinary UNC students and faculty committed to engaging in meaningful research related to race, racism and racial equity.

Research Student Fellows will receive a $3000-stipend to support their work with a faculty mentor between June-August 2021. We have paired you with [name] in the Department of Anthropology whose expertise aligns well with your area of interest. Your faculty mentor is excited to work with you on the project that you outlined in your application. [name] will reach out to you by April 16 to discuss a potential schedule for the summer.

IAAR-SLATE Research Student Fellows are expected to attend and engage in virtual meetings with each mentee twice a week from June 1-August 15. As a fellow, you are expected to:

- work with your mentor to develop your research plans,
- seek out critical feedback on your project to help you progress, and
- participate in a culminating Fall 2021 undergraduate research symposium that will give you the opportunity to present your research to the campus community and broader public.

We are appreciative of your commitment and delighted to have you on board. Please feel free to send me an email if you have additional questions.

Sincerely,
Example Eight

May 17, 2021

Participant support stipend for [redacted] for the period 5/17/2021-6/30/2021. Stipend payment of $3,000 for work performed with [redacted]. Total stipend amount is $6,000 for period 5/17/2021-8/18/2021.

Invoice # [redacted] 3000.00 MAY 21
Recap and Q & A

Rebecca Jones, Moderator
Recap of Key Points

• All financial aid payments must be made through GradStar, including training grants and prizes that are only open to students.

• The Campus Voucher system will no longer let you enter certain accounts and others will trigger a pre-audit.

• The list of accounts that are no longer allowed and that trigger a review are on the Finance website.
Questions and Contacts

- Accounts Payable and Vendor Services | accountspayable@unc.edu
- Graduate School - GradStar | gradstar@unc.edu
- Office of Scholarships & Student Aid | aidinfo@unc.edu
- Cashier’s Office | funded@unc.edu
- Office of Sponsored Research | ResAdminOSR@unc.edu