

Student Payments & GradStar Impacts to Sponsored Projects Part 1 | Overview

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Objectives

- Overview of Changes with Student Payments in GradStar
- Define Student Payment Types
- Review Account Code Changes and Budget Considerations
- Know Your Resources and How to Get Help
- Q & A



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Overview of Changes



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Implementation of Payments in GradStar

Effective August 2021, student payments (by semester) are entered in GradStar

The payment types impacted:

- fellowships and scholarships
- training grants
- awards for prizes and contests open for students only
- research studies and internships, including stipends
- travel for the student's academic benefit

<https://gradschool.unc.edu/policies/faculty-staff/gradstar/20210426-upcomingchangesmemo.html>



Complying with Financial Aid Regulations

- Any amount of assistance paid to students because of enrollment at a post-secondary institution to cover education related expenses is **financial aid**.
- Federal guidelines require reporting of any information which may have a bearing on a student's receipt of federal student aid to the University's Office of Scholarships & Student Aid (OSSA)
- All financial aid must be coordinated with other aid a student receives from OSSA.
 - Students receiving state, federal, or need-based institutional funding may **not receive total aid that exceed the cost of attendance**



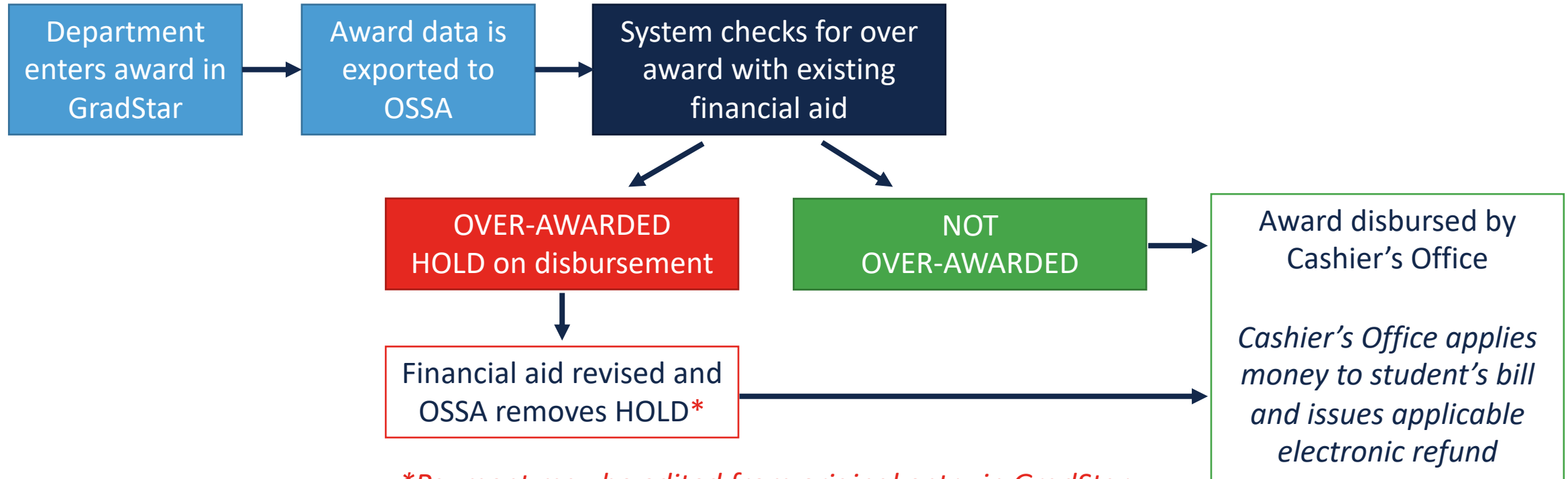
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Workflow to Disburse Funds to Students



**Payment may be edited from original entry in GradStar.*

Edits to GradStar Award/Payment Entries

- Any awards that were revised from the original amount entered in GradStar to reflect the actual amount disbursed to the student will generate a journal to debit or credit the appropriate chartfields in ConnectCarolina.

Only edits to prior fiscal year awards requires the dept to enter a JOT – Other Campus Journal.



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Student Payment Types



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Payments Entered in GradStar

Payment Type	Financial Aid	Student Account
Fellowships & scholarships Paid to an individual to support the pursuit of study or research	YES	Pays outstanding charges on student account
Training grants An agreement that provides a coordinated training program for students; not compensation (no effort reporting)	YES	Pays outstanding charges on student account (trainee book allowance, dependency, and travel payment types are Refund Only)
Prizes/contests open to students only Ex: Honors Taylor Research Award , Innovate Carolina Award	YES	Refund Only
Research studies and internship opportunities (UNC or external) Ex: Graduate School's Off Campus Dissertation Fellowship	YES	Refund Only
Travel for the student's academic benefit Ex. Attending/presenting at conference; conducting fieldwork or other research	YES	Refund Only
Reimbursement of expense for personal research project or similar Paid to an individual to support the pursuit of study or research	YES	Refund Only

**Reported on 1098-T Taxes - not withheld for US persons; may be withheld for non-US persons.*

<https://gradschool.unc.edu/policies/faculty-staff/gradstar/studentpaymenttypes.html>



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Non-Financial Aid Payment Types

Payment Type	Payment Process	Taxation
Employment Compensation Research Assistant, Teaching Assistant or Graduate Assistant positions held by students	Entered as payroll (ePAR) in ConnectCarolina; direct monthly payments to student	Reported on W-2
Prizes / Contests open to students, faculty, staff, or public Ex. APPLES Service Learning Award in Honor of Ned Brooks	Entered as a voucher in ConnectCarolina, direct payment to student	May be subject to reporting on 1099-M or W-2. 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	Entered in University's travel system , direct payment to student	Not Taxable
Reimbursement of expense Ex: a student purchases office supplies for their department from their own funds	Entered as a voucher in ConnectCarolina, direct payment to student	Not Taxable

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Account Code Considerations



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Account Codes in GradStar

<https://gradschool.unc.edu/policies/faculty-staff/gradstar/accountcodes.html>

Account	Description	Account	Description
568110	Scholarship-Non-Service State	568810	Tuition-Graduate Assistant
568120	Fellowship-Non-Service State	568910	Scholarship-UNC Program
568510	Scholarship-Teachers	568940	Fellowship-Non-Qualified Ed
568610	Grant-Medical/Dental Minority	569110	Scholarship-Academic Enhance
568710	Traineeships-Degree Stipend	569134	Fellowship-Schol Undergrad
568720	Traineeships-Dependent Allow	569135	Fellowship-Schol Graduate
568730	Traineeships-Tuition	569140	Research/Intern Undergrad
568731	Traineeships Fees-Grants Allow	569141	Research/Intern Graduate
568732	TraneshipFee-Fed Grant Unallow	569144	Travel Award Undergraduate
568740	Traineeships-Book Allowance	569145	Travel Award Graduate
568750	Traineeships-Travel	569150	Scholarship-Forfeit Tuition
568760	Traineeships-Other	569175	CARES_HEERF_Student_Emerg_Aid
568770	Traineeships-Non-Degree	569180	Fellowship-Non Serv Non-State
568780	Traineeships-Clinical Fellow	569190	Awards-Student
568790	Traineeships-Carryover Un Fds		

Account Codes NOT Allowed in AP Vouchers

<https://ccinfo.unc.edu/wp-content/uploads/sites/219/2021/07/Changes-to-Student-Payments-for-Voucher-Preparers-Users-Webinar-07202021.pdf>

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568780	Traineeships-Clinical Fellow	569190	Awards-Student
568790	Traineeships-Carryover Un Fds		

- **Honoraria**
522810 and 522820
- **Non-Instructional Services**
522922 and 522923
- **Participant Stipends**
569311 and 569312 (expenses)
- **Study Subjects**
523150 (payments) and 523160 (expenses)
- **Educational Awards for Non-UNC enrolled Students**
558430

Accounts Requiring Pre-Audit Review

NOT for student financial aid or study subjects.

- **569311:** Payments to non-student, non-service participants in workshops, seminars, conferences, summer institutes, etc.
- **569312:** Payments to non-student, non-service participants in workshops, seminars, conferences, summer institutes, etc. for transportation and subsistence expense incurred during the program.

***NOTE:** If you have an existing award which should pay a student via financial aid/GradStar, work with your Sponsored Projects Specialist to process a Budget Revision Form to properly allocate budget for future expenditures.*

Participant Stipends



Resources and Getting Help



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Key Resources

Policies

- [GradStar Student Payments Policies Guide with FAQs](#)
- [Student Travel Funding and Payment Policies](#)

Reference Guides & Calculators

- [GradStar Step-by Step Guide](#) and [GradStar User Guide](#)
- [Student Payment Types Quick Reference](#)
- [Salary Stipend Calculator for Graduate Students](#)
- [Training Grant Student Payment Calculator](#)
- [Student Payments and Taxes](#)
- [OSR Graduate Fees Guidance](#)

Key Training

For GradStar Users

- [Changes to Student Award Payments for GradStar Users Webinar Recording](#)
- [Changes to Student Award Payments for GradStar Users Webinar Slides](#)
- [Questions from Changes to Student Award Payments for GradStar Users Webinar](#)

For Voucher Preparers

- [Changes to Student Award Payments for Voucher Preparers Webinar](#)
- [Changes to Student Award Payments for Voucher Preparers Webinar Slides](#)
- [Answers from Changes to Student Award Payments for Voucher Preparers Webinar](#)

Contacts for Getting Help

- **For policy or functional questions on GradStar**
email the [Graduate School](#) at gradstar@unc.edu
- **For questions about student accounts**
email the [University Cashier](#) at funded@unc.edu
- **For questions about financial aid**
email the [Office of Scholarships and Student Aid](#) at aidinfo@unc.edu
- **For questions about sponsored projects**
email the [Office of Sponsored Research](#) at ResAdminOSR@unc.edu

Questions?





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