

Student Payments & GradStar Impacts to Sponsored Projects Part 2 | Training Awards & Travel

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Objectives

- Define Training Grants, Stipends, and Financial Aid
- Impacts to Training Awards
- Best Practices Appointing Trainees
- Travel for University Research
- Know Your Resources and How to Get Help
- Q & A



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Impacts to Training Awards



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Defining training grants, stipends, and financial aid

Training grant is an agreement that provides a coordinated training program for students, postdoctoral researchers, staff, teachers and/or faculty who are selected by the institution to be a part of the training program.

Stipend is a payment from a training grant that is made to an individual to support a training/learning experience. Stipends are frequently in the form of a “living allowance” and are intended to offset living expenses. Stipends are not compensation for work performed and there are no effort reporting requirements related to receiving a stipend payment.

Financial aid includes all monies paid to support students *unless* payments are to compensate for work performed or reimbursement of travel performed on behalf of the University. In other words, any travel, research, or other activities that are primarily for the benefit of the student and their education (including training grants) are considered financial aid for reporting purposes.



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Impacts to Students on Training Awards

- All monies paid to support students are considered financial aid **except**:
 - compensation for work performed
 - reimbursement of travel expenses performed on behalf of the University
- Payment schedule change to semester frequency
- As all monies paid to students must be coordinated with other aid to prevent over awarding federal aid – this may impact certain students’ ability to be appointed to training awards or vice versa, their ability to get financial aid
 - Students should contact the [Office of Scholarship and Student Aid](#) if they have questions about their financial aid package and how funding they accept from University sources may impact their aid eligibility.



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Impacts to Training Awards Continued

For Example: A graduate student has a slot on a training award (T32) and their stipend is entered into GradStar to pay them from the PS Project ID for that T32. In the system check, it was identified that the student has received additional aid and as a result, their award entry in GradStar was reduced as to not exceed the cost of attendance.

*To pay the student their stipend, the student would need to be supported from another **non**-training/fellowship award and paid via payroll (employment compensation).*



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Best Practices Appointing Trainees



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Why is the KK End Date Important?

- GradStar differs from ConnectCarolina in that there is not a budget check option
- What this means is that awards you enter in GradStar will default to pay from your department's suspense chartfield if:
 - the PS Project ID's KK end date has passed
 - there is insufficient budget on the project
 - the PS Project ID is in a Reporting or Closed status

**Best
Practices
Appointing
Trainees**

How do you prevent GradStar payments going to suspense?

- Appointing Trainees:
 - If the appointment end date for the trainee exceeds the KK end date entered on the PS Project ID, submit a request to OSR to have the KK end date extended.
 - Currently, you can email ResAdminOSR@unc.edu or work with your Sponsored Projects Specialist to have the KK end date extended to match the appointment end date.
 - Coming Soon, OSR will be releasing a ServiceNow form that will provide a streamlined process to request a KK date extension.

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Travel for University Research



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Understanding Travel Payments

- When paying a student for travel, it is important to ensure that payment is paid through the appropriate system that will result in compliance with applicable laws and regulations:
 - **GradStar**
 - **University's travel systems:** WebTravel/CABS or Concur (when Concur is made available for student transactions).
- The purpose of a student's travel impacts how funds should be provided and accounted for.

Travel Purpose	Is this Financial Aid?	Payment Method
Research to support academic dissertation, thesis, or training that is primarily for the student's benefit.	<p style="text-align: center;">Yes</p> Complete OSSA Online Form. There may be limits on how much can be paid to, or on behalf of, a Federal aid recipient.	Grad Star
Travel to complete service or project as part of a scholarship, fellowship, or award. <i>(can include various travel methods such as airfare, bus, car, etc.)</i>	<p style="text-align: center;">Yes</p> Complete OSSA Online Form. There may be limits on how much can be paid to, or on behalf of, a Federal aid recipient.	Grad Star
Travel for enrichment opportunities such as conferences, seminars, networking events, education related activities, etc. that primarily benefit the student.	<p style="text-align: center;">Yes</p> Complete OSSA Online Form. There may be limits on how much can be paid to, or on behalf of, a Federal aid recipient.	Grad Star
Internship travel. <i>Includes, but not limited to, funds provided for housing, food, and relocation expenses.</i>	<p style="text-align: center;">Yes</p> Complete OSSA Online Form. There may be limits on how much can be paid to, or on behalf of, a Federal aid recipient.	Grad Star
Travel for University business on behalf of the department or school. <i>Ex. Student is presenting or actively participating in a conference or competition on behalf of the University</i>	<p style="text-align: center;">No</p>	Accounts Payable (AP) Voucher System/ Travel System
Reimbursement for Travel on behalf of the University (primarily benefiting the University not the individual) <i>Ex. Student travels to China to perform sponsored research, which happens to be the topic of her dissertation. The University would otherwise perform research on this topic, regardless of the student's research – the University is the primary beneficiary.</i>	<p style="text-align: center;">No</p>	Accounts Payable (AP) Voucher System/ Travel System

Decision Tree

Travel for University Research

- **Student is primary beneficiary** - the purpose of the travel is educational assistance to aid in the pursuit of study or independent research.

Example M. A student incurs travel and other research expenses while traveling to Brazil to perform sponsored research on medical treatments, which is the topic of their dissertation.

- **University is primary beneficiary** - the purpose of the payment is to reimburse the individual for business expenses incurred on behalf of the University.

Example N. A graduate student uses a portion of the institutional allowance on their fellowship grant on gene sequencing services related to their advisor's sponsored research. This research supports the student's academics but primarily furthers support of their faculty/advisor's research project.

Further Considerations of Travel for University Research

- Some components of travel for research may **benefit both** the University as well as the student.
- Departments should use their best judgment to determine if travel is primarily for University benefit or the student's academic benefit – and use the appropriate payment systems to pay/reimburse the travel.
- Refer to the Graduate School's [Travel Payment Policy Guide](#) for more details on supporting documentation (keep receipts) or completing any applicable forms.

<https://gradschool.unc.edu/pdf/TravelPaymentPolicy20210830.pdf>



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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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