Financial Aid Scholarship, Stipends, and Performance Agreements Policy and Procedures

This guide describes the process for campus departments and academic units to submit their scholarship, stipends, and other payments requests to Financial Aid for processing.

The types of payments Financial Aid will process are limited to scholarships, stipends, and performance agreements for **currently enrolled undergraduate UC Riverside** students.

Graduate student payment requests should be routed to Graduate Division (contact: Omar Faustino-Carreon) or School of Medicine student payments should be routed to School of Medicine (contact: Theresa Luther).

Financial Aid uses WorkFront as the online project management tool to process scholarship, stipend, and performance agreement requests. You can access WorkFront through R'Space under the Trainings and Tools section. This document will cover the three requests available to submit in WorkFront.

Definitions

Scholarships are financial support for students to pay for educationally related expenses. They are earned by meeting criteria of the scholarship donor/organization. Some are merit based and some are financial need based; some are a combination of the both. Some scholarships can be renewable with certain criteria needing to be met (such as units required, GPA, financial need). Scholarships can be from on campus departments or outside agencies.

Stipends are financial assistance or support paid to university students. There should be no obligation to perform any assigned tasks or specific projects and no work should be assigned, according to this chart from Accounting.

Performance agreements are payments for services rendered through an executed agreement, request to be submitted after service is provided.

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Timelines

During non-peak seasons, it will take Financial Aid 2-3 weeks to process requests. During the peak season of July-October, it will take 4-5 weeks to process.

Priority deadlines will be established soon. The goal of the priority deadlines are to ensure that the scholarship or stipend is processed in time for the fee payment deadlines. Financial Aid will continue to process all scholarships submitted after these dates; these deadlines are the last dates in which we can guarantee processing will be completed prior to the fee payment deadlines.

Late Awards

Financial Aid operates on the academic/award year rather than the fiscal year. Additionally, UCR is a header campus meaning that Summer is the start of our new academic year. Late awards for the academic year that is ending is allowed through September. For example, a late award for 2023-24 is accepted until September 30, 2024.

Note: Per federal regulations, students cannot be awarded above the Cost of Attendance. For some of our students who receive multiple or very large scholarships, the addition of a scholarship may require that we reduce other forms of financial aid (federal, state, or institutional) for compliance with federal law. It reduces confusion for the student and reduces chances of bill backs if we are able to make the adjustments before aid has disbursed. Please adhere to the priority deadlines whenever possible.

Before you submit a request

1. Submit one request per funding source. You may list multiple students on one request as long as they are all being paid by the same funding source. If you have multiple scholarships with different funding sources, you will need to submit a new request for each scholarship.

2. Campus departments and academic units are invited to contact Financial Aid *before* they choose their scholarship recipients to ensure the student can review the full amount of the scholarship. Per federal regulations, when Financial Aid processes a scholarship, it may have an impact on the student's other financial aid. The impact will be determined by what the scholarship covers (for example tuition only), a student's financial need as determined by their financial aid application (FAFSA or CADAA), and the student's Cost of Attendance (the overall maximum amount of financial aid that a student can receive). You can email the Scholarship Manager Monica Martinez-Daniels at monica.martinez@ucr.edu for a Need Analysis to be conducted for your finalists.

3. Be ready to transfer funds. If the scholarship/stipend is an award your department/unit manages, the funding will need to be transferred to Financial Aid. Financial Aid cannot start processing until funds are transferred. If funding is not transferred, there will be a delay in processing your request. Financial Aid will only keep requests with pending funds opened for 4 weeks. Financial Aid will reach out to the department/unit regularly during that time.

How to determine which request to submit

The WorkFront [Financial Aid Scholarship/Stipend Award Request queue](#) is updated to reflect the different requests for Scholarship or Stipend Awards, ScholarshipUniverse Request, or Performance Agreement.

Scholarship Request

This request is for Financial Aid to process and post a scholarship to a student's financial aid offer. Financial Aid will process the request in compliance with federal, state, and institutional financial aid regulations.

How to fill out the request

1. Select "[FA Scholarship Request](#)" from the drop-down menu.

2. Student Information Section: Download the hyperlinked spreadsheet template. Please review the template and fill in each section required. Financial Aid needs to see the student's full name, Student ID Number, amount awarded per term. Please ensure the student's information is correct. Select the current Academic Year that the award is for, it should be the current academic year. You can add additional information/comments if necessary such as if you have a preference on a disbursement date after taking the processing timeline into account. Save the file and upload it to the WorkFront ticket.

3. Requestor Information: WorkFront will recognize the requestor as the Primary contact for Financial Aid. Provide a secondary contact who can be contacted, if needed. Select your organization and/or type in your campus department's name.

4. Funding information: Provide the COA used for fund transfer. The COA for Financial Aid awards will have a standard set of values listed below. Currently, the primary values that will vary will be the Fund, Activity, and Project.

Entity	Fund	Activity	Account	Function	Program	Project	Flex 1	Flex 2
1511	Your Fund	A01465 OR A01601	BC35	78	000	KXXXXXXXXX or 0000000000	0000000000	00000000

If a Project Number does not apply, then 0000000000 will be the Project value. For accounts with a Project Number (beginning with K), they must have a budget under BC35 in Oracle Financials/PPM to proceed with awards. These use A01465 for the Activity. For accounts that have a Foundation Number, please use Activity A01601. If the account does not have a Project Number or Foundation Number, please use activity A01465.

Example COAs

Foundation Fund: 1511-42795-A01601-BC35-78-000-0000000000-0000000000-00000000

Non-foundation/C&G fund: 1511-53715-A01465-BC35-78-000-0000000000-0000000000-00000000

Contract & Grant fund: 1511-21100-A01465-BC35-78-000-K011789002-0000000000-00000000

If funding already exists within Financial Aid's accounts, please add "N/A" on this field.

5. Type in the Total Amount. Please ensure this matches with the dollar amount listed on the spreadsheet you upload.

6. Submit request!

WorkFront will send you an email for the ticket that you submitted.

PLEASE NOTE: WorkFront will call this ticket an "ISSUE" and Financial Aid will process your ticket into a "PROJECT." This is important as Financial Aid will start communicating with you through the "PROJECT" rather than the ticket you submitted. You will want to watch for a new email notification from WorkFront when the fiscal team reviews your request. This will now be under the "PROJECT."

Stipend Request

This request is for Financial Aid to process and post a stipend to a student's financial aid offer. Financial Aid will process the request in compliance with federal, state, and institutional financial aid regulations.

How to fill out the request

1. Select "FA Stipend Request" from the drop-down menu.

2. Student Information Section: Download the hyperlinked spreadsheet template. Please review the template and fill in each section required. Financial Aid needs to see the student's full name, Student ID Number, amount awarded per term. Please ensure the student's information is correct. Select the current Academic Year that the award is for, it should be the current academic year. Save the file and upload it to the WorkFront ticket.

   For Stipends, Financial Aid will be able to process quarterly or monthly payments. You can choose the payment date. However, summer stipends must land on weekdays as these are manually disbursed. Depending on the month, it might overlap between two quarters. Please be mindful of this and select the correct quarter.

3. Requestor Information: WorkFront will recognize the requestor as the Primary contact for Financial Aid. Provide a secondary contact who can be contacted, if needed. Select your organization and/or type in your campus department's name.

4. Funding information: See information provided here.

ScholarshipUniverse Request

The ScholarshipUniverse Request ticket is currently only for those who are part of the pilot group with Financial Aid. Once the pilot is completed, Financial Aid welcomes new campus departments/academic units to participate in the platform.

ScholarshipUniverse is a new scholarship platform that can simplify the scholarship application and selection process for staff. It saves time on the application process and helps draw up an applicant pool quickly. It improves visibility across departmental scholarships. And it makes the awarding process more efficient as unmet need is visible to determine a student's exact eligibility.

For more information about whether you think ScholarshipUniverse can work for you, please use this screening form.

How to fill out the request

1. Select "ScholarshipUniverse Request" from the drop down menu.

2. Requestor information: Please indicate staff who will be responsible for managing and assisting on the scholarship process for your area. Financial Aid requires two names – the primary contact and a secondary contact. The primary contact is the *Scholarship coordinator* from Academic Unit/Campus Department. This person will be managing the scholarship process for your area. The secondary contact should be *Scholarship assistant* from Academic Unit/Campus Department. This person will be helping the coordinator in the scholarship process for your area.

    You will then include the academic unit/campus department you work in.

    There is also a text box in this section in the event that you want to share with Financial Aid information about your scholarship that is noteworthy.

3. Funding information: See information provided here.

Performance Agreement Request

Financial Aid will accept a Performance Agreement request from campus departments when the student has already completed their performance/service. Financial Aid will coordinate with Student Business Services and report this payment as a resource on a student's financial aid offer. Departments do not need to transfer funds. Rather, Financial Aid will require a COA from the department and give it to Student Business Services so that they may charge that account.

How to fill out this request

1. Select "Performance Agreement" from the drop-down menu.
2. Requestor Information: WorkFront will recognize the requestor as the Primary contact for Financial Aid. Provide a secondary contact who can be contacted, if needed. Select your organization and/or type in your campus department's name.

3. Student Information: Provide the student's name and Student ID Number. Answer questions about the type of student and service. Describe the type of award.

    If you have multiple students whom you are awarding, then use the template included on the request. Fill out appropriately.

4. Funding Information: For this type of request, you do not need to transfer funds. You will provide the COA that Financial Aid will instruct Student Business Services to charge.

How to track your request

There are various steps involved in processing your request. The below section describes in detail the workflow and how Financial Aid and/or the WorkFront system keeps you updated at each step.

Understanding the workflow

1. Financial Aid will first reach out when your ticket is converted into a PROJECT. This means that Financial Aid's fiscal team has started reviewing your request.

   The fiscal team will verify funding is transferred in Oracle Budget.

   They will also review for a subcode that may already be created for your funding source. The subcode is needed as it is used to award your scholarship in Banner.

   If there is no subcode already established for your funding source, then the FA fiscal team will request one from Accounting. This subcode creation process can add an extra week or two in the overall processing timeframe. During year end close, it can take longer than two weeks.

   If a subcode already exists but has been deactivated. Financial Aid will still need to request the reactivation of the subcode from Accounting.

   After Accounting reviews and approves, then they send the request to Student Business Services for review and for creation of a detail code. If Accounting does not approve, they will communicate to the FA fiscal team. The FA fiscal team will reach out to the campus department/academic unit based on Accounting's update. Internal conversations/reviews may occur.

   After Student Business Services processes the detail code, then it comes back to the FA fiscal team. They will update Banner and fund the subcode. Lastly, they will notify the Scholarship Manager that this request is ready to be processed.

2. The Scholarship Manager will start processing the request, in the order received. A review of the student's demographic information and financial aid offer will be conducted. The manager will review the student's information – such as the name and SID matching, the terms of the award, the student's enrollment. A review of the student's eligibility will also occur as the scholarship must be coordinated with the student's existing financial aid and it may require adjustments to the other aid to fit this new scholarship in.

   The Scholarship Manager may reach out to the department if there are challenges with the award.

3. Once the award is posted for the student(s) on the request, then the Scholarship Manager will tag the requestor to notify them that the award is posted. The WorkFront PROJECT will also be closed out. You will receive an email notification from WorkFront about this.

Communication during the process

PLEASE NOTE: WorkFront will call the ticket you submit an "ISSUE" and Financial Aid will process your ticket into a "PROJECT." This is important as Financial Aid will start communicating with you through the "PROJECT" rather than the ticket you submitted.

You will want to watch for a new email notification from WorkFront when the fiscal team reviews your request. This will now be under the "PROJECT."

You will also receive a notification when the Scholarship Manager awards the scholarship and notifies you upon completion. You, the primary contact, will be notified.

How Financial Aid processes your request

When a scholarship/stipend gets processed through Financial Aid, every effort is made to ensure the student can see some of this funding, within the federal regulations we operate under.

These are the three possible outcomes that may happen when we award your source of funding to the student:

Outcomes

1. Refund: A student may receive a refund if they do NOT have an existing balance on their Student Account

   FA may be able to award the full amount of the scholarship/stipend however if the student has a balance on their Student Account, then their award will be used to pay down or pay off the balance first. The Student Business Services Office will determine if the student can be refunded or if the new award will be used to pay off an existing balance.

   If a credit still remains, then the Student Business Services Office can refund it.

2. Reduce loan debt: When processing the new source of funding into the financial aid offer, it could require reducing loans to fit the scholarship in. Although the student may not receive a refund, this is still a positive outcome as it is reducing a student's indebtedness.

3. Revision of other grant funding: If needed, Financial Aid will exercise this option. This would mean that Financial Aid will reduce a grant to add in the scholarship/stipend, dollar for dollar.

4. Return the funding: Financial Aid will exhaust all available options before getting to this step. However, when a student is maxed out on their Financial Aid (i.e. they have received financial aid up to their cost of attendance) and there are no other adjustments available to make, then Financial Aid will not be able to add the award. Financial Aid will return the funding to the scholarship donor/campus department/academic unit.

Financial Aid Contact Information

For questions, please contact the appropriate staff below:

Fiscal/funding:
Alexandra Mayer, Fiscal Analyst
Cesar Lopez, Fiscal Manager

Scholarship awarding and processing:
Monica Martinez-Daniels, Scholarship Manager