

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.

When awarding a UCR student, it is important to ensure the payment is classified and processed correctly to comply with federal and state regulations, UCR policies, University of California policies, federal taxation policies, and donor intent.

The Financial Aid office makes every effort to maximize a student's funding opportunities. However, there will be situations when a department wants to provide funds or cover expenses but doing so will necessitate the reduction of another resource due to limitations prescribed in regulations for federal aid recipients.

The types of payments Financial Aid will process are limited to scholarships, stipends, and performance agreements for **currently enrolled undergraduate UC Riverside** students. Visiting students may be allowed – please see definitions below.

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

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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.

Tuition Awards are any awards to a student, regardless of funding source, which provides funding restricted to pay only certain educational expenses assessed by UCR (usually tuition). All tuition and fee awards for undergraduate must be accounted for in a student's financial aid offer and processed through Banner. Per federal regulations, a student may only receive one tuition paying award.

Examples of tuition awards

- The California Student Aid Commission (CSAC) Cal Grant Program
- Sponsored programs or special institutes, including sponsored contract and grant accounts; exchange student, summer institute and workshop participants.
- Employer
- Some Veteran's education tuition benefits (these are not considered in determination of eligibility for federal financial aid)

UCR student is a person seeking a degree or other educational credential at UCR. A student ceases to be a student upon graduation or official separation from UCR (unless on an official leave of absence). A student who is not enrolled in the summer but has not graduated is still a student.

UCR Visitor student is a person who has an active matriculation and are enrolled. The student would have a Banner record and we would be able to process these requests. This student would not qualify for UCR financial aid.

Federal Aid and Award Limitations

Federal regulations under the Higher Education Act of 1965 require institutions to monitor and limit total financial resources awarded to students receiving federal financial aid (includes grants, need-based employment, and loans).

- Federal aid recipients cannot have total resources in excess of their cost of attendance (COA). The COA, therefore, represents a cap on total funding.
- Federal aid recipients with aid based on financial need cannot have need-based funds in excess of need, which is defined as the difference between COA and the Student Aid Index (SAI), a figure determined for each student who completes the Free Application for Federal Student Aid (FAFSA).
- An 'over-award' occurs when the student receives more aid than he or she is eligible to receive. This may be need-based aid in excess of need, total resources in excess of COA, or both. UCR is required to resolve all over-awards.

Financial Aid Office Exceptions and Appeals

The regulations for federal financial aid recipients allow for certain limited exceptions when a student's expected costs and financial need limit eligibility for additional funds.

A student's estimated Cost of Attendance (COA) may be increased, on appeal with documentation, to add additional education-related costs in instances where there is insufficient room in the need OR COA to accommodate the full amount of all potential awards. Financial Aid Office staff reviews each appeal on a case-by-case basis and makes allowable adjustments to the COA and may post all or a portion of the award. A department may wish to award funds to cover costs, programs, research or travel not directly related to the student's pursuit of a degree. However, the determination of the appropriateness of a requested increase in the student's COA is at the sole discretion of the Financial Aid Office.

Students may also appeal to have documented unusual or unanticipated expenses considered in their COA. Examples include significant uninsured or out of pocket medical expenses, child care costs, car repairs, purchase of a computer. These decisions are also made on a case-by-case basis and are at the discretion of the Financial Aid Office. This is known as the Cost of Attendance (COA) Appeal and a student may request an appeal to be opened via the Financial Aid section of R'Web.

Please note: If a student opts to submit an appeal, it will need to be reviewed and approved before your scholarship/stipend can be processed.

Timelines

Scholarships and stipends processed after the Financial Aid Office creates financial aid offers may result in a reduction of aid previously offered, so it is best to make awards before the Financial Aid Office determines eligibility for other funds. Financial aid offers for the new year are usually released during late June.

We encourage you to submit your requests by this timeline, of early summer. If you cannot submit your requests by that time, then please submit as close to the start of the traditional academic year as possible.

The Financial Aid Office will still process requests after financial aid offers are made, but please inform your students that this new scholarship/stipend may not result in a refund. This is due to the adjustments that may occur to other aid, in order to fit in the scholarship/stipend. For more information, please read the "How Financial Aid Processes Your Request" below.

For the Summer term: The summer term is the start of the new academic year. You can submit requests as early as April however Financial Aid may not be able to process it that early if the system setup for the new year is not yet completed.

Processing 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: The goal of the priority deadlines are to ensure that the scholarship or stipend is processed in time for the fee payment deadlines. The deadlines are posted on the [Academic Calendar](#). Requests should be submitted with enough processing time in mind if you want these

awards to be processed by 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 or fiscal year-end.

Year-End deadlines: Please submit your requests by June 13 in order for Financial Aid to process your request before fiscal year end. Requests received past June 13th run the risk of not being processed before the fiscal year end closes. Please plan accordingly.

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 2024-25 is accepted until September 30, 2025.

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 aware of the funding changes as you no longer have to transfer funds to Financial Aid. For Contract & Grant funds: Funds will need to be budgeted into BC35. You will be asked to provide the project number, projection expiration date, and total award amount on the ticket for. For Non Contract & Grant funds: You will be asked to provide the fund number, activity (for which FA will create a deficit on), and the total award amount. The Standard Operating Procedure explaining this change can be found [here](#).
4. Secondary contact: The secondary contact field is now required in the WorkFront request. We ask that you include either a supervisor or another staff member so that multiple staff in your department have access to these tickets so that you can keep your records of these requests.

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, Scholarship Universe 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:

Given the new Oracle Budget environment, you will no longer need to transfer funds to Financial Aid. We will instead process a transaction to your department's Fund and Activity, under Function 78 and BC 35. This transaction will create a **deficit** to the departmental account unless your funding is already sitting in BC35, Function 78 or you immediately do an INTRA org transfer in advance of your request. However, this deficit can then be addressed internally using an INTRA org transfer.

The advantage of this change is that it should no longer require for an INTER org transfer to be processed, which requires multiple approvals, and will allow for requests to move forward sooner since we will no longer need to confirm receipt of the departmental fund transfer before proceeding.

For Contract & Grant funds:

Funds will need to be budgeted into BC35. You will be asked to provide the project number, projection expiration date, and total award amount in the WorkFront request.

For Non Contract & Grant funds:

You will be asked to provide the fund number, activity (for which FA will create a deficit on), flex number (if applicable), and the total award amount in the WorkFront request.

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](#).

Scholarship Universe Request

The Scholarship Universe 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.

Scholarship Universe 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 Scholarship Universe can work for you, please use [this screening form](#).

How to fill out the request

1. Select "[Scholarship Universe 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: 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 either budgeted into BC35 OR process a transaction on the fund/activity you provided 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 four 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.

Please note if a student is a recipient of the Middle Class Scholarship: The Middle Class Scholarship is determined after a student is awarded any federal aid, state aid, and institutional aid. The California Student Aid Commission may re-calculate the award when a student receives a new scholarship if the total of all of their institutional and external scholarships exceeds \$8,154. This dollar amount is the "self-help student contribution" that CSAC uses in their formula. However, the new scholarship and/or stipend you award may impact their Middle Class Scholarship immediately if the fund source is different — federal or state instead of institutional. The UCR Financial Aid Office will make the adjustments as required by CSAC. For more information about the Middle Class Scholarship and how it's calculated please visit [this link](#).

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