Visiting Scholar/Student Researcher Stipend Disbursement Overview
Units may provide a stipend of up to $10,000 per one appointment year which can be used to cover living expenses, travel costs, and incidental research expenses, but not as a form of salary compensation.

Stipends can only be provided to visiting scholars and visiting student researchers who are in residence at UC Berkeley.

Previously, stipends have been requested using a paper form. These stipends will now be requested online through the VSPA Gateway.
Visiting Scholar/Student Researcher
Stipend Disbursement Paper Form

Disbursements Office
Visiting Scholars Fellowship/Scholarship* Request Form
(not applicable for payment of services)

Date of Request ____________________

Visiting Scholar Information
Name: ________________________________
Family First Middle Initial Vendor No.

U.S. Citizen: Yes [ ] No [ ]
If No: Visa type ________________
Country of residence (for tax purposes) ________________________________

Resident of California Yes [ ] No [ ]
New request [ ] Amendment to request [ ]

Frequency: Single payment [ ] Monthly [ ] Other (specify) ________
If multiple payments, payment period from ________ to ________

Total Award $ ________
Total # of Payments ________
Amount of Each Payment $ ________
Date To Start Payment(s) ________
BU ____________________
Account ____________________
Fund ____________________
Org ____________________
Program ____________________
Project ____________________
Flex ____________________

Purpose of Payment ____________________

Note: You must attach a copy of the award/offer correspondence. This payment request cannot be processed without this correspondence.

Departmental Contact, VSPA Approval, and Payment Authorization** Information

I certify that the payee satisfies the University of California at Berkeley’s criteria for a Visiting Scholar and the information provided on this form is correct.

Name: ____________________ Department: ____________________ E-mail Address: ____________________
Authorized Signature: ____________________ Telephone No.: ____________________ Authorized VSPA Signature: ____________________

For additional information, please see the *Visiting Scholar* definition at http://vspa.berkeley.edu/vsdef.html

You may need to forward additional documents to Disbursements e.g. Tax form 8233, tax treaty statement, etc. For information on payments to Foreign and Non California residents see http://disbursements.berkeley.edu/foreign/indexForeign.htm

*Note electronic funds transfer (EFT) is the preferred method of payment for all students and foreign scholars. EFT applications and instructions may be found at http://financialoperations.berkeley.edu_Forms/FormsIndex.htm

**Payment authorizer must be an approved signatory for the designated charstring and have the following form on file at the Disbursements Office:
http://financialoperations.berkeley.edu_Forms/disbSignatureAuthorization.pdf

Please submit this form to the VSPA Office, 699 Barrows Hall #2572

revised 5/09/07
Visiting Scholar/Student Researcher
Stipend Disbursement Limits

Stipend disbursements to visiting scholars have a limit of $10,000 per one appointment year.

PIs/faculty sponsors who wish to pay a VS/VSR over the $10,000 limit must submit a letter requesting an exception with a justification.

The letter needs to be addressed to Sam Castañeda and uploaded to the VSPA Gateway.
New User Role in VSPA Gateway

The **Disbursement Preparer (DP)** is the person authorized by the department to submit stipend requests.

The **DP** must receive authorization from the appropriate financial head of the department to process payments.

To obtain access as a **DP** in the **VSPA Gateway**, your **CSS Team Lead** must email vspa@berkeley.edu with your name and assigned departments.
Visiting Scholar/Student Researcher Stipend Disbursement Process At-A-Glance

- Visiting scholar/student researcher must have an approved appointment in the VSPA Gateway
- Disbursement Preparer submits a stipend request for the scholar in the VSPA Gateway
- International visiting scholars/student researchers must have a GLACIER record
- Disbursement Preparer enters the scholar's vendor number
- VSPA checks that the stipend is within the 10K limit and the University Services Fee has been paid
- VSPA approves the stipend request in Gateway
- Stipend request is sent to Payroll Office when the payment date is within 2 weeks
- Payroll Office processes stipend request and notifies Campus Shared Services to approve the payment in BFS
Visiting Scholar/Student Researcher
Stipend Disbursement Payment Options

Stipend requests will be paid out to the scholar via check by U.S. mail unless otherwise stated.

• Check by U.S. Mail
  The check will be mailed to the scholar at his/her local address as listed in the scholar’s vendor record.

• Check to be Held for Pickup
  You can indicate to hold the check for pick up on campus in the Disbursement Preparer Comments section of the online request form in Gateway.

• EFT (Electronic Funds Transfer) in the U.S.
  To set up EFT, go to:
  [http://controller.berkeley.edu/electronic-funds-transfer-eft-authorization-instructions#vendors](http://controller.berkeley.edu/electronic-funds-transfer-eft-authorization-instructions#vendors)

*International wire transfers are not permitted* because stipends are only provided to scholars who are in residence at UC Berkeley.
Visiting Scholar/Student Researcher Stipend Disbursement Process
To access the stipend request feature:

Go to the VSPA Gateway: https://vspa-gateway.berkeley.edu

Log in with your CalNet ID
Visiting Scholar/Student Researcher Stipend Disbursement Process

Welcome to VSPA Gateway

- Forms to Invite Visiting Scholars or Postdocs
  - Invitation Form for Visiting Student Researcher
  - Invitation Form for Postdoc
  - Invitation Form for Visiting Scholar

  Please search the existing visitors for the person you wish to invite before using the invitation form. If the person is already in the VSPA gateway, use the ‘Add’ feature to add a new visit for the person. If you do not have access to the add feature for that person, ask the VSPA Office to add the person for you.

- Search visitors or browse lists of visitors. From these pages, administrators can prepare applications, approve applications, generate PDF letters for applications, link visitors and visits to HCM records and create visit reappointments.
  - Search
  - Browse Lists
  - Submitted
  - Prepared
  - Approved
  - Active
  - Expired

- Pages to Manage VSPA Departments and Users
  - Manage Users
  - Manage Departments
  - Settings

Click on Visitors to look up scholar
Searching the visitor will bring up their record
Stipends are requested by appointment period.

Click on Add under the Stipend column.
Select the checkbox that indicates the **Disbursement Preparer** is authorized to submit the stipend disbursement request

In the **Disbursement Preparer Comments** section, list any additional instructions for the payment
Visa Type and Citizenship data is automatically pulled from the visitor’s Gateway record.
Select **Payment Frequency** (Single, Monthly, or Other)
Visiting Scholar/Student Researcher Stipend Disbursement Process

If payment frequency is Other, use the line items in Payment Schedule to specify Date to Start Payment and Amount of Each Payment

Payment Schedule:

<table>
<thead>
<tr>
<th>Amount</th>
<th># of Payments</th>
<th>Amount of Each Payment</th>
<th>Date to Start Payment</th>
<th>BU</th>
<th>Account</th>
<th>Fund</th>
<th>Org</th>
<th>Program</th>
<th>CF1</th>
<th>CF2</th>
</tr>
</thead>
<tbody>
<tr>
<td>3000</td>
<td>1</td>
<td>3000</td>
<td>July 21 2016</td>
<td>1</td>
<td>55030</td>
<td>68395</td>
<td>26474</td>
<td>72</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2000</td>
<td>1</td>
<td>2000</td>
<td>November 2016</td>
<td>1</td>
<td>55030</td>
<td>68395</td>
<td>26474</td>
<td>72</td>
<td></td>
<td></td>
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<tr>
<td></td>
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<td>July 21 2016</td>
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<td></td>
</tr>
</tbody>
</table>
Select **Purpose of Payment**
Selecting **Other** will require you to **Describe Purpose of Payment**
Enter **Total Award**

If payment frequency is **Monthly**, the **Amount of Each Payment** will be the **same amount on the same day every month** as the day listed in **Date to Start Payment**.
**Visiting Scholar/Student Researcher Stipend Disbursement Process**

VSPA Gateway automatically validates the chartstring information entered.

If the payment is going to be made from more than one chartstring, list each chartstring separately on individual line items.

*Payment Frequency:* Monthly Payment

*Purpose of Payment:* Living Expenses

*Total Award:* $5000

If the stipend request is more than $10,000, you can upload an exception letter after you submit this request.

**PAYMENT SCHEDULE**

<table>
<thead>
<tr>
<th>Amount</th>
<th># of Payments</th>
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<td>1</td>
<td>55030</td>
<td>68395</td>
<td>26474</td>
<td>72</td>
<td></td>
<td>OAVSP</td>
</tr>
<tr>
<td>2500</td>
<td>1</td>
<td>2500</td>
<td>September 8, 2016</td>
<td>1</td>
<td>55030</td>
<td>68395</td>
<td>26474</td>
<td>72</td>
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<td>OAWOR</td>
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<td></td>
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<td>August 8, 2016</td>
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<td>August 8, 2016</td>
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</tr>
</tbody>
</table>
If the payment dates are not on a monthly schedule or if the payment amounts are not equal, use individual line items to specify.

**Total Award** must equal the total sum of **Amount** in all line items.
You will NOT be able to make any changes to the **Payment Frequency**, **Purpose**, or **Payment Schedule** after it has been submitted in the VSPA Gateway.

To change those fields, submit a request to [vspa@berkeley.edu](mailto:vspa@berkeley.edu)
Visiting Scholar/Student Researcher Stipend Disbursement Process

Select Campus Sponsoring Unit

Press Submit
Instead of an email confirmation to the Disbursement Preparer, this on-screen message will appear
Dear Visiting Scholar and Postdoc Affairs,

A stipend request has been submitted for Visiting Scholar Oski Bear in the amount of $5,000.00 with the payout date of 07/19/2016 and is ready to be reviewed for approval. Please go to [http://vspa.gateway.berkeley.edu/stipend_requests/10000/edit](http://vspa.gateway.berkeley.edu/stipend_requests/10000/edit) to review the request.

Thank You.
Maria Lopez

VSPA will review the stipend request to see that it meets all requirements.
If the stipend request meets all requirements, the **Disbursement Preparer** will receive the above email with a reminder to enter the **Vendor Number** and to pay the **University Services Fee**.

This email serves as the approval email that can be sent to Berkeley International Office as confirmation of funding.
Within two weeks of the **Date to Start Payment**, if a **vendor number** has not been added to the record, an email reminder will be sent to the **Disbursement Preparer**.

Click on the link in the email to add a **vendor ID**.
Visiting Scholar/Student Researcher Stipend Disbursement Process

Stipend Request for Oski Bear

Preparer

I, as the preparer of the proposed stipend request, have confirmed authorization from the appropriate financial head of the department to submit this application.

Stipend

Visitor Name: Oski Bear
Requested Status: In Progress
Disbursement Prepared: [Date]
Comments:

Include instructions for payment delivery here, e.g., Hold for Pickup, EFT has been set up. If payment is for a visit that has ended, include the payment date(s) here.

HCM ID: 71031
* Vendor Number: 55555
US Citizen: False
Visa Type: F1 Exchange Visitor (Scholar)

This field is populated from the visitor record in the Gateway. Please contact VSPA if this information is incorrect.

* Payment Frequency: Single Payment
* Purpose of Payment: Living Expenses
* Total Award: $5000.0

If the stipend request is more than $5000, you can upload an exception letter after you submit this request.

Stipend Update Information

Creation Date: Jul 19, 2016 19:31
Last Update Date: Jul 19, 2016 19:32
Last Modified by: Rachel Min Park

Enter in the Vendor Number

Press Save Changes
Instead of an email notification to the **Disbursement Preparer**, this on-screen message will appear.
VSPA will then verify that the **Vendor Number** has been added and **University Services Fee** has been paid.
If all requirements have been met, the VSPA Program approves the stipend disbursement request.
The Payroll Office will receive the above email to process the stipend disbursement request within two weeks of the Date to Start Payment.

The Disbursement Preparer and the VSPA Office will be copied on this email.
Following Up on the Status of a Stipend Disbursement Request
Go to the **VSPA Gateway**: [https://vspa-gateway.berkeley.edu](https://vspa-gateway.berkeley.edu)

Log in with your **CalNet ID**
Welcome to VSPA Gateway

- Forms to Invite Visiting Scholars or Postdocs
  - Invitation Form for Visiting Student Researcher
  - Invitation Form for Postdoc
  - Invitation Form for Visiting Scholar

  Please search the existing visitors for the person you wish to invite before using the invitation form. If the person is already in the VSPA gateway, use the 'Add' feature to add a new visit for the person. If you do not have access to the add feature for that person, ask the VSPA Office to add the person for you.

- Search visitors or browse lists of visitors. From these pages, administrators can prepare applications, approve applications, generate PDF letters for applications, link visitors and visits to HCM records and create visit reappointments.
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  - Expired

- Pages to Manage VSPA Departments and Users
  - Manage Users
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Click on Visitors to look up scholar
Search the scholar’s name to bring up their record
Under the **Stipend** column, click on **Existing Requests**

**Note:**

**Add** is to submit an additional stipend request; **Existing Requests** is to **Edit** or **View** previously submitted requests.
Visiting Scholar/Student Researcher Stipend Disbursement Process

This will take you to the scholar’s record
Scroll to the bottom of their record to see the status and information for all stipend requests.
Click on **Edit Stipend** for a particular stipend disbursement request to add information.
Visiting Scholar/Student Researcher
Stipend Disbursement Process

You can add **Vendor Number** or upload a **Stipend Exception Letter ONLY**

Press **Save Changes** once you are done
Instead of an email notification to the **Disbursement Preparer**, this on-screen message will appear.
Exceptions to the $10,000 Stipend Disbursement Limit
Look up the visitor’s record and click Add in the Stipend column for the appointment.
If you already have an exception letter, you can upload it AFTER submitting the request.

Press **Submit** after entering all required information
If the stipend request exceeds the $10,000 limit, an on-screen message will appear.
If the cumulative stipend request amount is over $10,000 in one APPOINTMENT YEAR, this email will be sent to the Disbursement Preparer.

Click on the link to go to the scholar’s stipend request and upload the exceptional approval letter.
Select **Choose File** to upload the exceptional approval request letter (must be in Word Doc or PDF format)
Visiting Scholar/Student Researcher Stipend Disbursement Process

Press **Save Changes** once the letter has been uploaded

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<td>55030</td>
<td>68395</td>
<td>26474</td>
<td>72</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Department Submitter:** Rachel Min Park

**Campus Sponsoring Unit:** Visiting Scholar and Postdoc Affairs Program

**Stipend Exception Letter (if needed):** Choose File **Sample stipend letter.docx**

**Stipend Update Information**

- **Creation Date:** Jul. 19, 2016 21:47
- **Last Update Date:** Jul. 19, 2016 21:50
- **Last Modified by:** Rachel Min Park

[Save Changes]
Instead of an email notification to the **Disbursement Preparer**, this on-screen message will appear:

VSPA will be notified via email that a letter has been uploaded for review.
When the exception request to the $10K limit has been approved, the **Disbursement Preparer** will receive the above email
Within two weeks of the **Date to Start Payment**, if a **vendor number** has not been added to the record, an email reminder will be sent to the **Disbursement Preparer**

Click on the link in the email to add a **vendor ID**
Enter in the **Vendor Number**

Press **Save Changes**
Instead of an email notification to the **Disbursement Preparer**, this on-screen message will appear.
VSPA will then verify that the **Vendor Number** has been added and the **University Services Fee** has been paid for the affiliate's appointment.
If all requirements have been met, the VSPA Program approves the stipend disbursement request.
Stipend Request Disbursement is ready to be processed

vspa_gateway@berkeley.edu

to glacieradmin, Maria Lopez, me •

Jul 18 (4 days ago) 🌟

Dear Payroll Admin,

The payment request for Oski Bear has been approved. At your earliest convenience, please process the payment for Oski Bear. You can access the affiliates Stipend Request and Appointment Letter here.

Thank you,

Visiting Scholar and Postdoc Affairs

The Payroll Office will receive an email to process the stipend disbursement request within two weeks of the Date to Start Payment
The Payroll Office will receive the above email to process the stipend disbursement request within two weeks of the **Date to Start Payment**

The **Disbursement Preparer** and the **VSPA Office** will be copied on this email.