UNIVERSITY OF CALIFORNIA, BERKELEY
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 ________

<table>
<thead>
<tr>
<th>Total Award</th>
<th>Total # of Payments</th>
<th>Amount of Each Payment</th>
<th>Date To Start Payment(s)</th>
<th>BU</th>
<th>Account</th>
<th>Fund</th>
<th>Org</th>
<th>Program</th>
<th>Project</th>
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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 chartstring and have the following form on file at the Disbursements Office: http://financialoperations.berkeley.edu/forms/dishbSignatureAuthorization.pdf

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

revised 5/9/07
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
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 for 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)
If payment frequency is **Other**, use the line items in **Payment Schedule** to specify **Date to Start Payment** and **Amount of Each Payment**.
Visiting Scholar/Student Researcher Stipend Disbursement Process

Select **Purpose of Payment**
Visiting Scholar/Student Researcher Stipend Disbursement Process

Selecting Other will require you to Describe Purpose of Payment
Visiting Scholar/Student Researcher Stipend Disbursement Process

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**.

<table>
<thead>
<tr>
<th>Amount</th>
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<th>Program</th>
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<th>CF2</th>
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<td>2500</td>
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<td>55030</td>
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<td>72</td>
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Visiting Scholar/Student Researcher Stipend Disbursement Process

Enter chartstring information

VSPA Gateway automatically validates the chartstring

If the payment is going to be made from more than one chartstring, list each chartstring separately on individual line items
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.
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...
Visiting Scholar/Student Researcher
Stipend Disbursement Process

Stipend Request Prepared for Oski Bear

vspa_gateway@berkeley.edu

Jul 19 (6 days ago)  

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 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**
Enter in the Vendor Number

Press Save Changes
Instead of an email notification to the Disbursement Preparer, this on-screen message will appear.
Visiting Scholar/Student Researcher
Stipend Disbursement Process

Dear Visiting Scholar and Postdoc Affairs,

Visiting Scholar Oski Bear must pay the University Services Fee before any payments can be disbursed. Please go to http://vspa-gateway.berkeley.edu/stipend_requests/10020/edit

Thank You,

Maria Lopez

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.
Visiting Scholar/Student Researcher  
Stipend Disbursement Process

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
Visiting Scholar/Student Researcher Stipend Disbursement Process

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 InviteVisiting 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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- Pages to Manage VSPA Departments and 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
Visiting Scholar/Student Researcher Stipend Disbursement Process

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.
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
Search for Visitors

<table>
<thead>
<tr>
<th>Name</th>
<th>Visit Dates</th>
<th>Prepare Approve HCM</th>
<th>Letters</th>
<th>Appointment +/−</th>
<th>Stipend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bear, Oski</td>
<td>Jan. 01, 2016 to Aug. 31, 2016</td>
<td>HCM</td>
<td>VS/VSR1</td>
<td>Add</td>
<td>Add</td>
</tr>
<tr>
<td></td>
<td>Sep. 01, 2016 to Dec. 31, 2016</td>
<td>HCM</td>
<td>VS/VSR1 VS/VSR2</td>
<td>Add</td>
<td>Add</td>
</tr>
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</table>

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

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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

Press **Save Changes** once the letter has been uploaded.
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.
Visiting Scholar/Student Researcher
Stipend Disbursement Process

Stipend Request Disbursement is ready to be processed  

vspa_gateway@berkeley.edu

to glacieradmin, Maria Lopez, me •

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.
VSPA Gateway Help Desk

**HOURS**  Monday-Friday
9am to 4pm

**CALL**  +1 (510) 643-9681

**EMAIL**  vspa@berkeley.edu
BEAR HUG