Visiting Scholar/Student Researcher Stipend Disbursement Overview
Units may provide a stipend of up to $20,000 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 Name ___________________  First Name ____________  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 ___________________

Total $ ___________________

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/disbSignatureAuthorization.pdf

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

revised 09/07
Stipend disbursements to visiting scholars have a limit of $20,000 per one appointment year.

PIs/faculty sponsors who wish to pay a VS/VSR over the $20,000 limit must submit a letter requesting an exception with a justification.

The letter needs to be addressed to Yvette Lane-Newton 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 20K 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 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
Visiting Scholar/Student Researcher
Stipend Disbursement Process

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.
Select **Purpose of Payment**

1. 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  
**Request Status:** Propose  
**Disbursement Preparer 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:** 71831  
**Vendor Number:**

**US Citizen:** Yes  
**Visa Type:** Ph.D. Exchange Visitor (Scholar)

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

**Payment Frequency:** Other  
**Purpose of Payment:**

Use payment line items below to specify payment schedule

**Total Award:**

If the stipend request is more than one line item, upload a selection letter after you submit this request.

**PAYMENT SCHEDULE**
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**.
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
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

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
Visiting Scholar/Student Researcher Stipend Disbursement Process

Go to the **VSPA Gateway**: [https://vspa-gateway.berkeley.edu](https://vspa-gateway.berkeley.edu)

Log in with your **CalNet ID**
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

Show All Information for Visit of Oski Bear

Visitor Type: Visiting Scholar
Standing: In Good Standing

Personal Data
Family Name: Bear
First Name: Oski
Birthdate: Apr. 06, 1900
Sex: Female
Country of Citizenship: France
Visa Type: J-1 Exchange Visitor (Scholar)

Permanent Address
Street: Rue des croissants
City: Paris
Province: 16th Arrondissement
Country: France
Zip Code/Postal Code: 92222
Telephone: 1234567890
Email: vspa@berkeley.edu
Berkeley Email: False
Opt-Out from VSPA E-mails: False
This should be the address where the scholar permanently resides (e.g. home country, home state)

Academic History
Type of Highest Degree: PhD
Date of Highest Degree: Sep., 2014
Institution of Highest Degree: University of California, Berkeley
Earned: 

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.
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 $20,000 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
Visiting Scholar/Student Researcher
Stipend Disbursement Process

If the stipend request exceeds the $10,000 limit, an on-screen message will appear.
If the cumulative stipend request amount is over $20,000 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.
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 $20K 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.
The Payroll Office will receive an email to process the stipend disbursement request within two weeks of the Date to Start Payment.

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
Visiting Scholar/Student Researcher
Stipend Disbursement Process

Stipend Request Disbursement is ready to be processed

vspa_gateway@berkeley.edu

to glacieradmin, Maria Lopez, me •

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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 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
Using the Visiting Scholar Fellowship Recurring Payment Form
As of August 1st, 2018, all Visiting Scholar Stipend Payments, both recurring and one-time must now be submitted using the recurring payment form in BearBuy. For questions/help with the new process, please contact the Accounts Payable help desk at disburse@berkeley.edu and make sure to insert "VSPA Question" in the subject line.
To Begin:

To begin, access the Recurring Payment form, log into BearBuy and use the sidebar to navigate to Shop>Shopping>View Forms; from that screen, select ‘AP Access Only.’
To Begin:

- Open the Recurring Payments form by clicking on the ‘View Form’ button on the right.
Section 1: Payee Information

Type of Activity

US Citizen / Permanent Resident *

If not US Citizen, enter the type of VISA

"If payee is not a US citizen or permanent resident, they will be required to complete a UCB Glacier Tax record before payment can be made. For information regarding payments to foreign individuals & Glacier Form, please send the completed Glacier information form to glacieradmin@berkeley.edu"

Enter Supplier

Expense Information

Location of Service or Research

If the location of research is outside of California and the person is a nonresident of California, please have the vendor complete a CA587 Form.

If the location of research is outside of US and the person is a Foreign National, please have the vendor complete a UC W-8BEN Sections A, H, and I (required).

Total Award / Amount
Section 1: Payee Information

1. Select Type of Activity
2. Select if UC Citizen or Permanent Resident (Yes or No).
3. If not a US Citizen then enter the type of Visa. If payee is not a US citizen or permanent resident, they will be required to complete a UCB Glacier Tax record before payment can be made. [Glacier Form](#). Please send the completed Glacier information form to glacieradmin@berkeley.edu.
4. Enter Supplier/Payee Name: Enter the name of the payee. If they are not in the system, you cannot move forward. Will need to fill out the UC Berkeley [vending form](#) and then submit to [vending](#) and have that payee set up as a vendor.
5. Expense Information: Enter a description of what the payment is for. If for a Visiting Scholar fellowship payment then enter that into this field.
6. Location of Service or Research: If in California, list the city name (i.e., Berkeley). If outside of California, list the city and State or Country.
7. Total Award/Amount: Enter the total amount of payments to a single chartstring. If payments need to be made to multiple chartstrings, upon completion of this process, an additional form will be required.
Section 2: Payment Information

<table>
<thead>
<tr>
<th>Frequency of Payment</th>
<th>Start Date</th>
<th># of Payments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Please select... ▼</td>
<td>mm/dd/yyyy</td>
<td></td>
</tr>
</tbody>
</table>

If the frequency is 'Monthly', provide the 'Start Date' and '# of Payments'.

If the frequency is 'Other', provide the Payment Date(s) (mm/dd/yyyy) and Payment amount ($1000000.00)

Comments

250 characters remaining

expand | clear
Section 2: Payment Information

8. Frequency of Payment: Select whether the frequency of payment is monthly or “other”. Other would also be selected for a one-time payment. If selecting “other”, then provide additional information below in the comments field.

9. Start Date: For recurring payments, enter the date of the first payment, otherwise leave blank

10. # of Payments: For recurring payments, enter the total # of payments to be made

11. Comments field: This is a required field. If none of the conditions here apply, simply type “None”. If the payment frequency is other than monthly, then enter the frequency (i.e. weekly). If there is a one-time payment, then enter the required payment date and amount. If the check should be held for pickup, enter phone # and name of individual (must be either UC Berkeley employee or the payee) to be contacted.
12. Attachments: Click on the Add Attachments button and select/locate the completed Stipend Request form from the VSPA portal and attach.

*Privacy Warning*: Do not upload any document in BearBuy, or any other website application, *unless* the notice triggering data and the home & family data is blacked out and **completely unreadable**. The best approach is to remove this data from the document before uploading it. [Data Privacy]
13. At the top of the screen, make sure “Add and go to Cart” is in the Available Action window and select “Go”.

![Available Actions: Add and go to Cart](image)

14. This will close the window and take you back to BearBuy where you will see your Shopping Cart.
15. Click on “View Cart Details.”
16. Click on ‘Edit’ in the Org Node field; enter Org Node OAVCR and hit ‘save.’ This automatically routes your cart to the Visiting Scholars Program for approval.
17. Click on Final Review on the top right hand of the screen and it will instruct you to enter the chartstring that the Visiting Scholar Stipend is funded by, which you will find on the VSPA Stipend Request Form. Enter all chartfields listed on the VSPA form under Payment Schedule. The chartfields highlighted below are the minimum requirement, but if there is a CF1 and/or CF2 be sure to enter those as well and “Save”.

![Accounting Codes Table]
18. Click on the Submit button on the top right hand part of the screen.

19. The cart will be sent to a requisition creator in CSS.
   i. CSS will create the requisition
   ii. Then it will be sent back to the Visiting Scholars Program for Org Node Approval
   iii. Once the requisition is approved, the individual that submitted the requisition will receive an e-mail notification that a PO has been generated
   iv. Additionally, a notification will be sent to Accounts Payable to create both the recurring vouchers and any one-time vouchers specified.
   v. Vouchers will be visible in BearBuy by inquiring on the PO # provided, with the scheduled payment dates.
   vi. If changes are necessary to one or more scheduled payments, including a cancellation of a specific payment, e-mail disburse@berkeley.edu with your request and be sure to place “URGENT” in the subject line if the payment is scheduled in less than 5 business days.
20. If the shopper is an experienced BearBuy user that is familiar with the process for adding additional lines and/or chartstrings to an existing cart, then they should follow those same steps to add lines and/or chartstrings to this cart. For inexperienced BearBuy users, additional payments to be made to the same payee, using different chartstrings, repeat the steps here to create a new requisition for each chartstring.

Questions regarding this process? Please contact the Accounts Payable Help Desk at disburse@berkeley.edu