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 for work performed at UC Berkeley.

Stipends can only be provided to visiting scholars and visiting student researchers who are in residence at UC Berkeley.
Living allowance stipend disbursements to visiting scholars (VS) and visiting student researchers (VSR) 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 Director Yvette Lane-Newton and uploaded to the VSPA Gateway.

Local residency will be confirmed via email by VSPA staff.
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, local residency is confirmed, 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. EFT is best.

- **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/Visiting Student Researcher Living Allowance Stipend Disbursement Process
To access the stipend request feature:

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

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 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>
</tr>
</tbody>
</table>

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

Payment Schedule

Select Campus Sponsoring Unit: Chemistry Department
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 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

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.

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](http://vspa-gateway.berkeley.edu/stipend_requests/10020/edit)

Thank You,

Maria Lopez
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

Log in with your CalNet ID
Click on **Visitors** to look up scholar
Search the scholar’s name to bring up their record

<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</td>
<td>Remove</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>VS/VSR2</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Visiting Scholar/Student Researcher**

**Stipend Disbursement Process**

[Image of VSPA logo and search interface]

University of California, Berkeley
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.
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
If the stipend request exceeds the $20,000 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)
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.
Visiting Scholar/Student Researcher
Stipend Disbursement Process

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.
VSPA Gateway Help Desk

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

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

**EMAIL**  vspa@berkeley.edu