VSPA

VISITING SCHOLAR & POSTDOC AFFAIRS

UNIVERSITY OF CALIFORNIA, BERKELEY

Visiting Scholar/Student Researcher Stipend Disbursement Overview

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.

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

Disbursements Office ONLY:

Date
Entered_____

Date of Request _____

Visiting Scholar Information

Name: _____   _____
    Family   First   Middle Initial   Vendor No.

U.S. Citizen: Ye[ ] 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 chartstring and have the following form on file at the Disbursements Office: http://financialoperations.berkeley.edu/Forms/disb/SignatureAuthorization.pdf

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

revised 5/09/07

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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
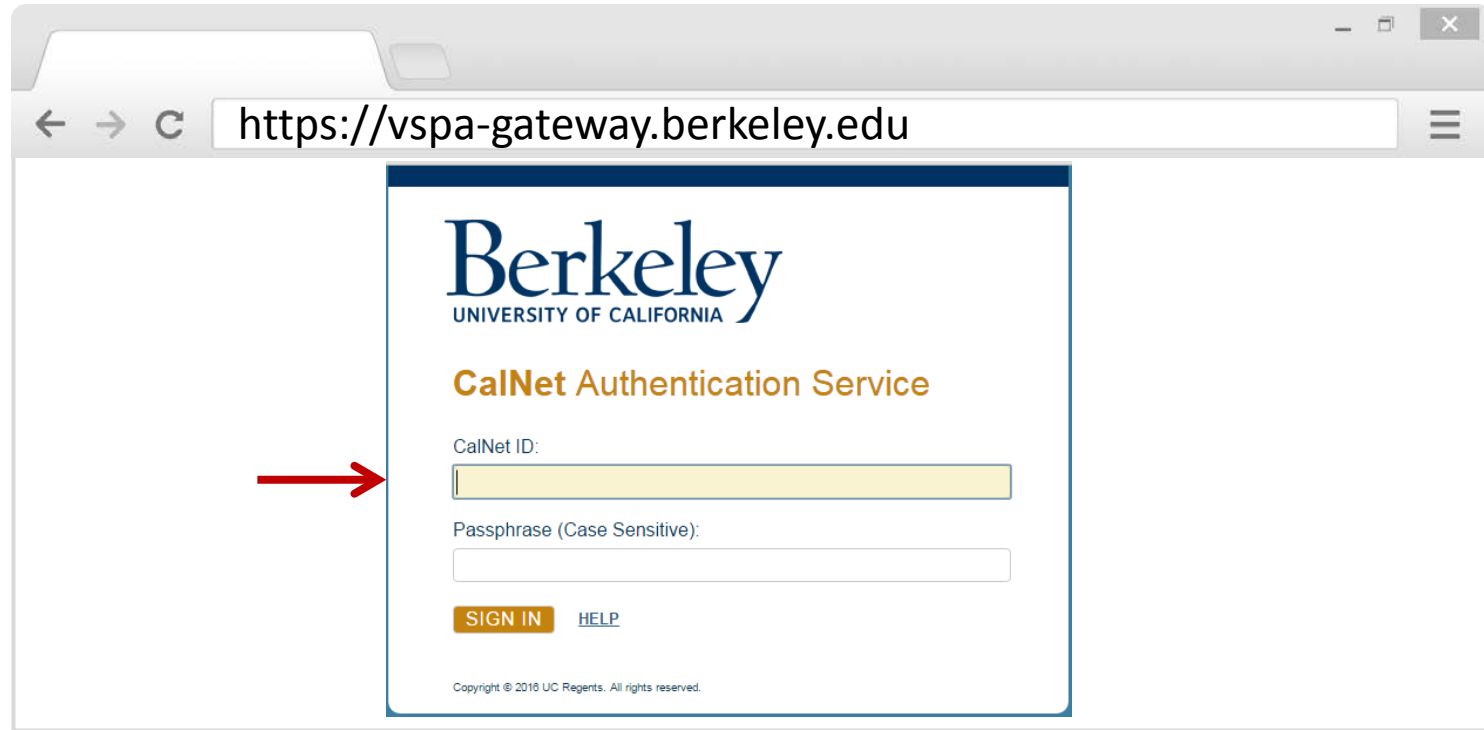
International wire transfers are not permitted because stipends are only provided to scholars who are in residence at UC Berkeley.

Visiting Scholar/Student Researcher Stipend Disbursement Process

Visiting Scholar/Student Researcher Stipend Disbursement Process
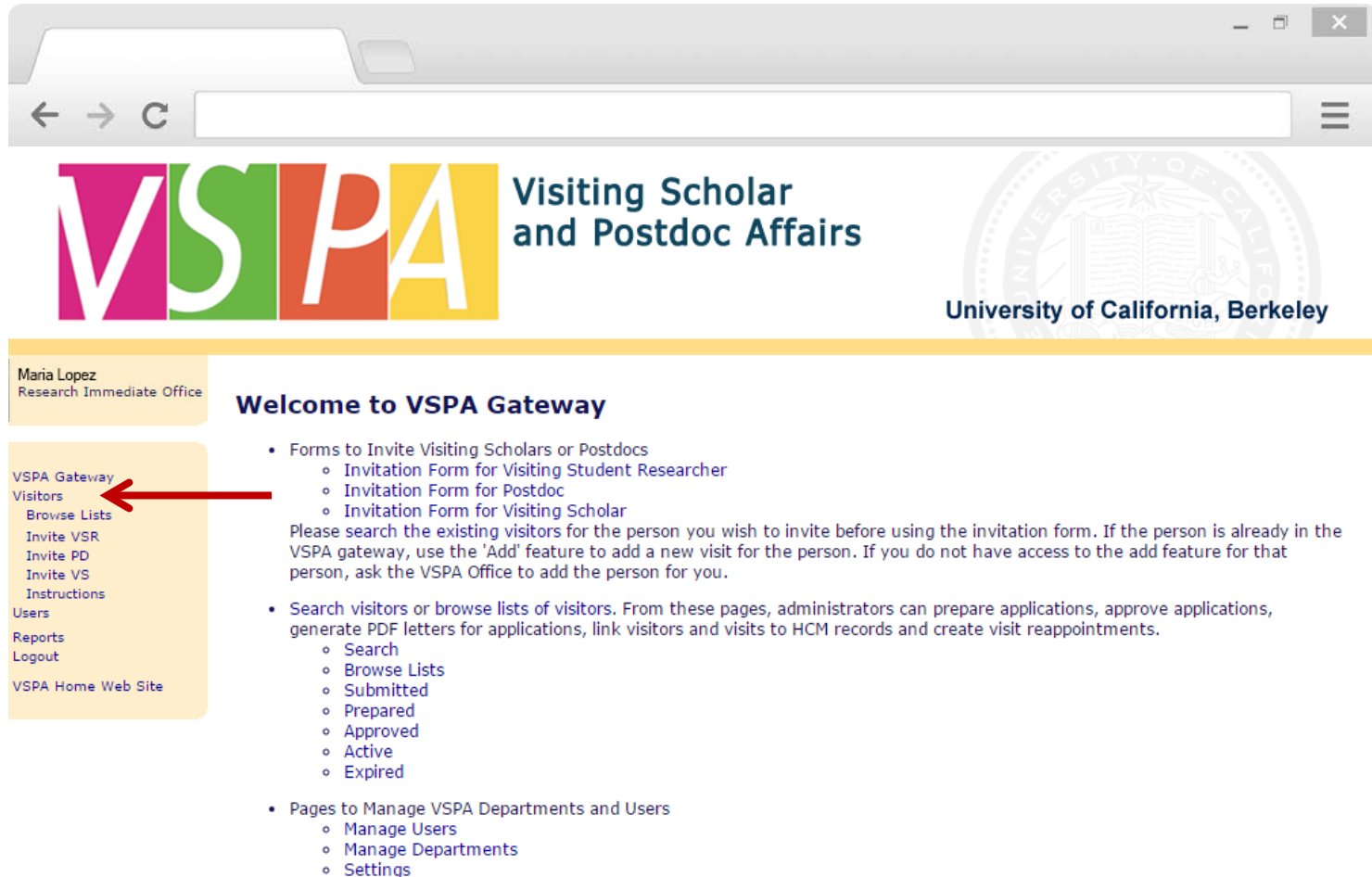
To access the stipend request feature:

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

Log in with your CalNet ID

Visiting Scholar/Student Researcher Stipend Disbursement Process

Click on **Visitors** to look up scholar

Visiting Scholar/Student Researcher Stipend Disbursement Process

Searching the visitor will bring up their record

Visiting Scholar/Student Researcher Stipend Disbursement Process

Stipends are requested by appointment period

Click on **Add** under the **Stipend** column

Visiting Scholar/Student Researcher Stipend Disbursement Process

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

Visiting Scholar/Student Researcher Stipend Disbursement Process

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**

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

* **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

Amount	# of Payments	Amount of Each Payment	Date to Start Payment	BU	Account	Fund	Org	Program	CF1	CF2
5000	2	2500	July 21 2016	1	55030	68395	26474	72		
			July 21 2016							
			July 21 2016							
			July 21 2016							

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**

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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

Visiting Scholar/Student Researcher Stipend Disbursement Process

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

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Visiting Scholar/Student Researcher Stipend Disbursement Process

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
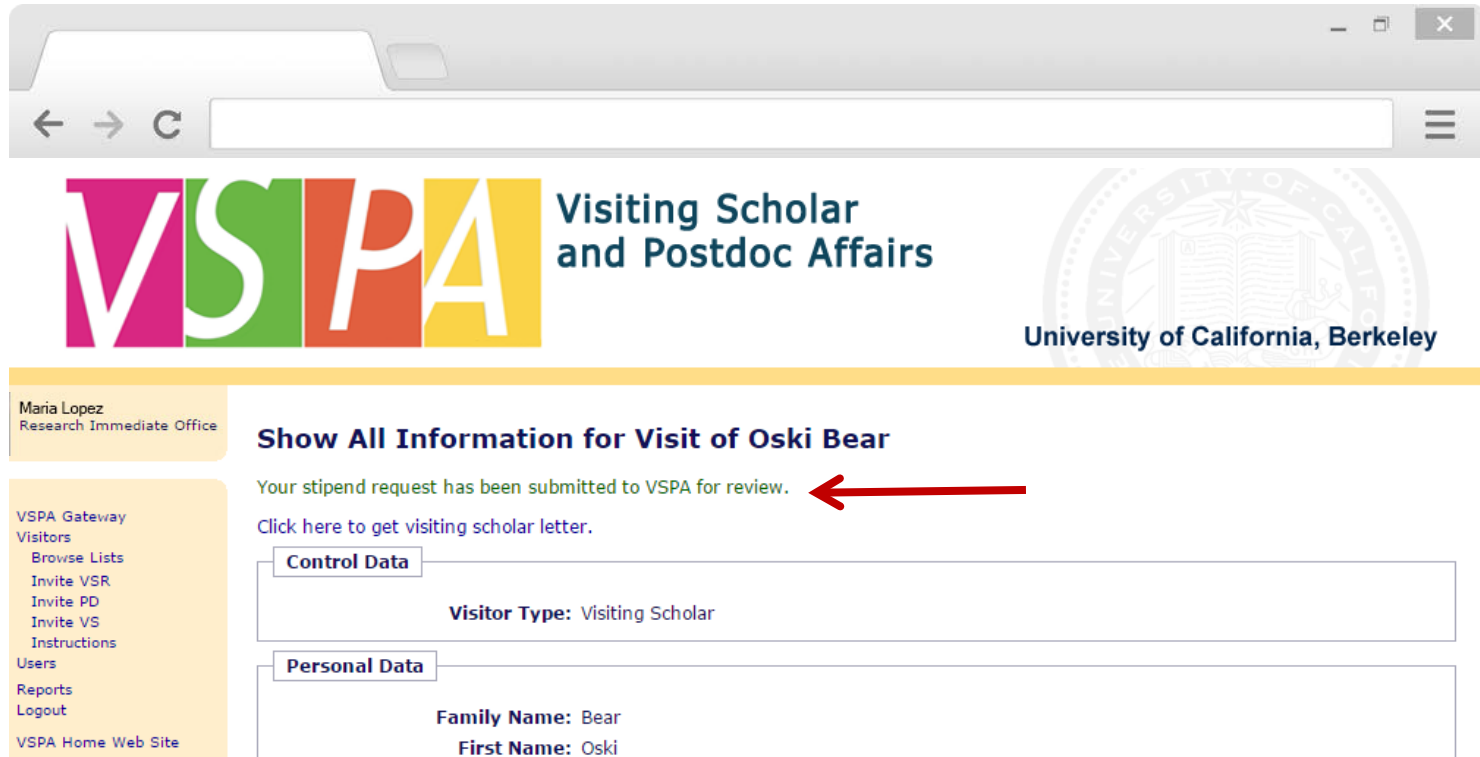

Select **Campus Sponsoring Unit**

Press **Submit**

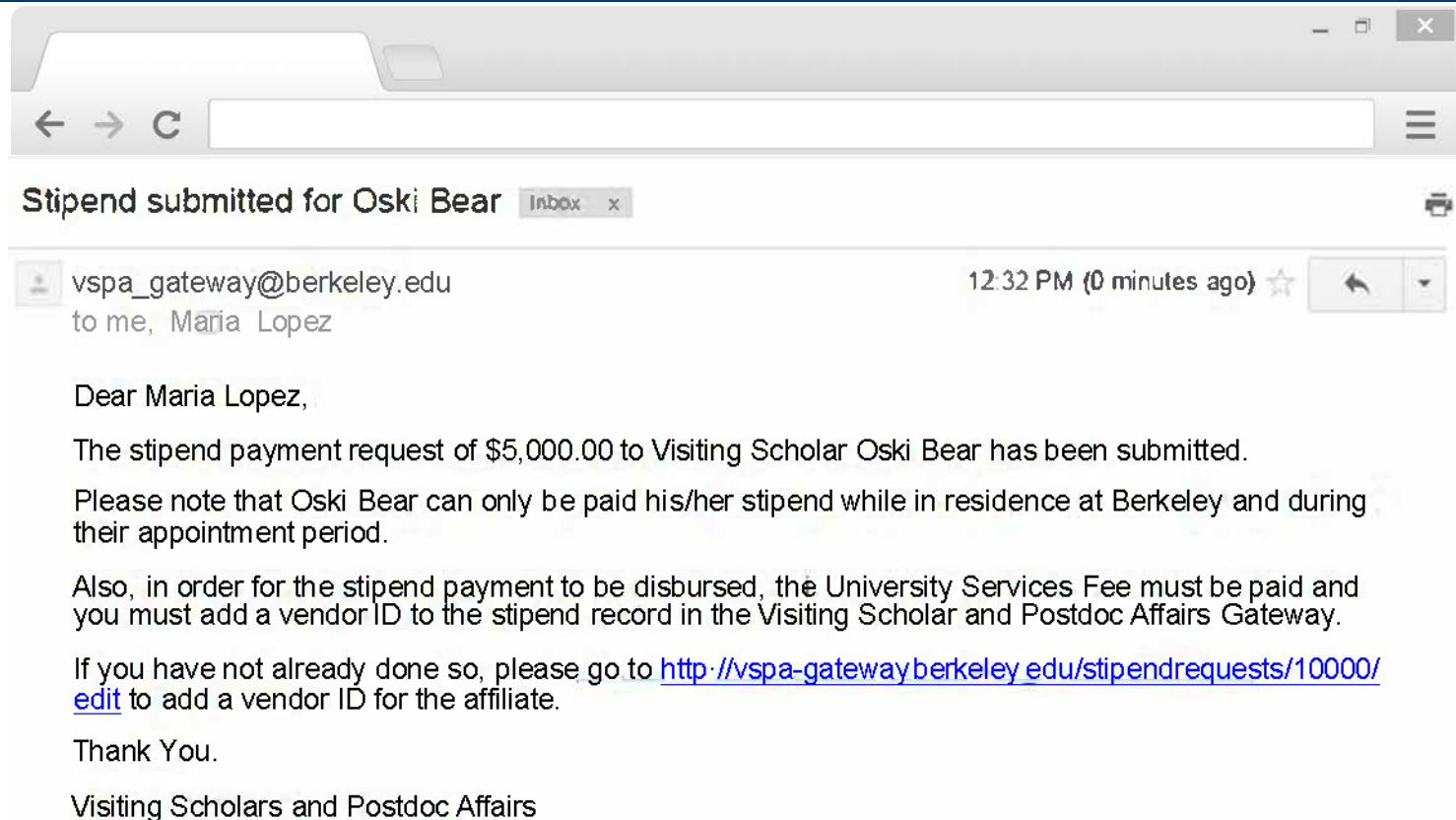# Visiting Scholar/Student Researcher Stipend Disbursement Process

Instead of an email confirmation to the **Disbursement Preparer**, this **on-screen message** will appear

Visiting Scholar/Student Researcher Stipend Disbursement Process

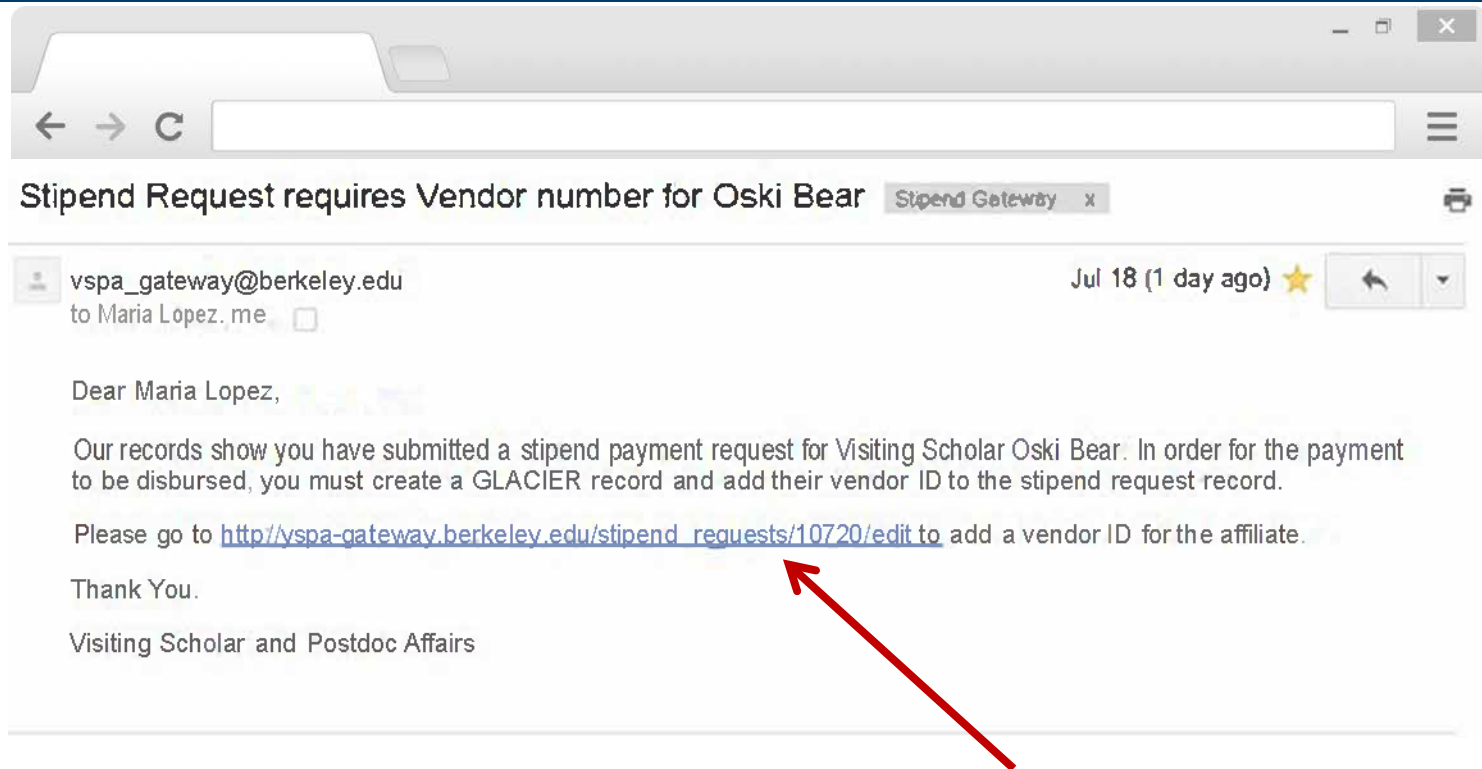VSPA will review the stipend request to see that it meets all requirements

Visiting Scholar/Student Researcher Stipend Disbursement Process

Stipend submitted for Oski Bear Inbox x

vspa_gateway@berkeley.edu 12:32 PM (0 minutes ago)
to me, Maria Lopez

Dear Maria Lopez,

The stipend payment request of $5,000.00 to Visiting Scholar Oski Bear has been submitted.

Please note that Oski Bear can only be paid his/her stipend while in residence at Berkeley and during their appointment period.

Also, in order for the stipend payment to be disbursed, the University Services Fee must be paid and you must add a vendor ID to the stipend record in the Visiting Scholar and Postdoc Affairs Gateway.

If you have not already done so, please go to http://vspa-gateway.berkeley.edu/stipendrequests/10000/edit to add a vendor ID for the affiliate.

Thank You.

Visiting Scholars and Postdoc Affairs

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

Visiting Scholar/Student Researcher Stipend Disbursement Process

Stipend Request requires Vendor number for Oski Bear Stipend Gateway x

vspa_gateway@berkeley.edu   Jul 18 (1 day ago)
to Maria Lopez. me

Dear Maria Lopez,

Our records show you have submitted a stipend payment request for Visiting Scholar Oski Bear. In order for the payment to be disbursed, you must create a GLACIER record and add their vendor ID to the stipend request record.

Please go to http://vspa-gateway.berkeley.edu/stipend_requests/10720/edit to add a vendor ID for the affiliate.

Thank You.

Visiting Scholar and Postdoc Affairs

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**

Visiting Scholar/Student Researcher Stipend Disbursement Process

Instead of an email notification to the **Disbursement Preparer**, this on-screen message will appear

University Services Fee Payment Required for Oski Bear — Stipend Gateway x

vspa_gateway@berkeley.edu   1:48 PM (0 minutes ago)

to me

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

Visiting Scholar/Student Researcher Stipend Disbursement Process

If all requirements have been met, the VSPA Program approves the stipend disbursement request

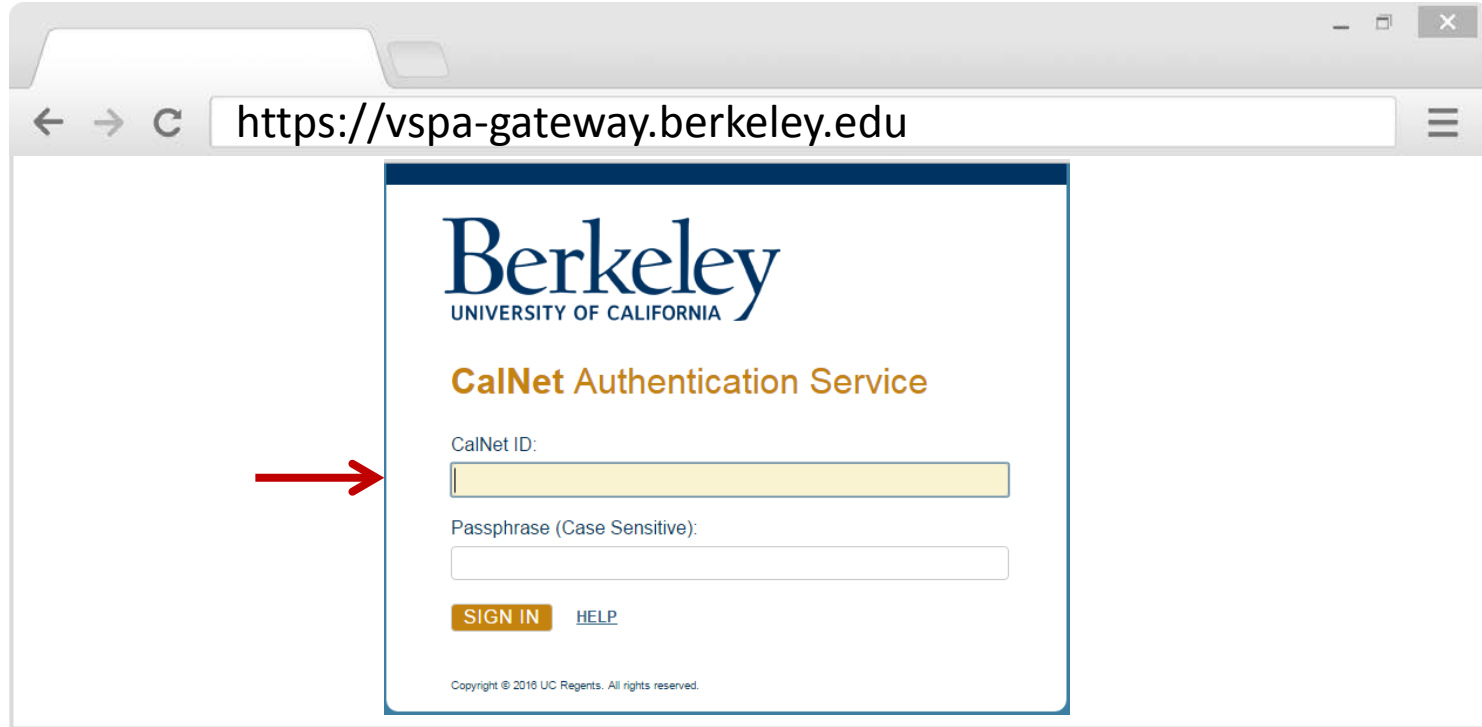# Visiting Scholar/Student Researcher Stipend Disbursement Process

Stipend Request Disbursement is ready to be processed Stipend Gateway x

vspa_gateway@berkeley.edu   Jul 18 (4 days ago)
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 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

Click on **Visitors** to look up scholar

Visiting Scholar/Student Researcher Stipend Disbursement Process

Search the scholar's name to bring up their record

Visiting Scholar/Student Researcher Stipend Disbursement Process

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

Visiting Scholar/Student Researcher Stipend Disbursement Process

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

Visiting Scholar/Student Researcher Stipend Disbursement Process

Instead of an email notification to the **Disbursement Preparer**, this on-screen message will appear

Exceptions to the $10,000 Stipend Disbursement Limit

Visiting Scholar/Student Researcher Stipend Disbursement Process

Look up the visitor's record and click **Add** in the **Stipend** column for the appointment

Visiting Scholar/Student Researcher Stipend Disbursement Process

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

Visiting Scholar/Student Researcher Stipend Disbursement Process

Letter of Exception to $10,000 Stipend Limit Required for Oski Bear   Inbox   x

vspa_gateway@berkeley.edu   2:50 PM (0 minutes ago)
to me, me

Dear Maria Lopez,

The stipend request for Visiting Scholar Oski Bear exceeds the limit of $10,000 per appointment year. The faculty sponsor for Oski Bear will need to submit a letter to request an exception to the $10,000 stipend limit with a justification for the exception. The letter should be addressed to Sam Castañeda and uploaded in the affiliate's Gateway record.

Upon receipt of the letter, the Visiting Scholar and Postdoc Affairs Program will let you know if the exception has been approved.

Please go to http-//vspa-gateway.berkeleyedu/stipend_requests/10001/edit to upload the exception letter.

Thank you,

Visiting Scholar and Postdoc Affairs

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

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Visiting Scholar/Student Researcher Stipend Disbursement Process

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

PAYMENT SCHEDULE

Amount	# of Payments	Amount of Each Payment	Date to Start Payment	BU	Account	Fund	Org	Program	CF1	CF2
6000	1	6000	Jul. 19, 2016	1	55030	68395	26474	72		

Department Submitter: Rachel Min Park

(captured when form submitted)

* Campus Sponsoring Unit: Visiting Scholar and Postdoc Affairs Program

Stipend Exception Letter (if needed): Choose File Sample stipen... 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

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

Visiting Scholar/Student Researcher Stipend Disbursement Process

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

Stipend submitted for Oski Bear   Inbox   x

vspa_gateway@berkeley.edu   2:54 PM (0 minutes ago)
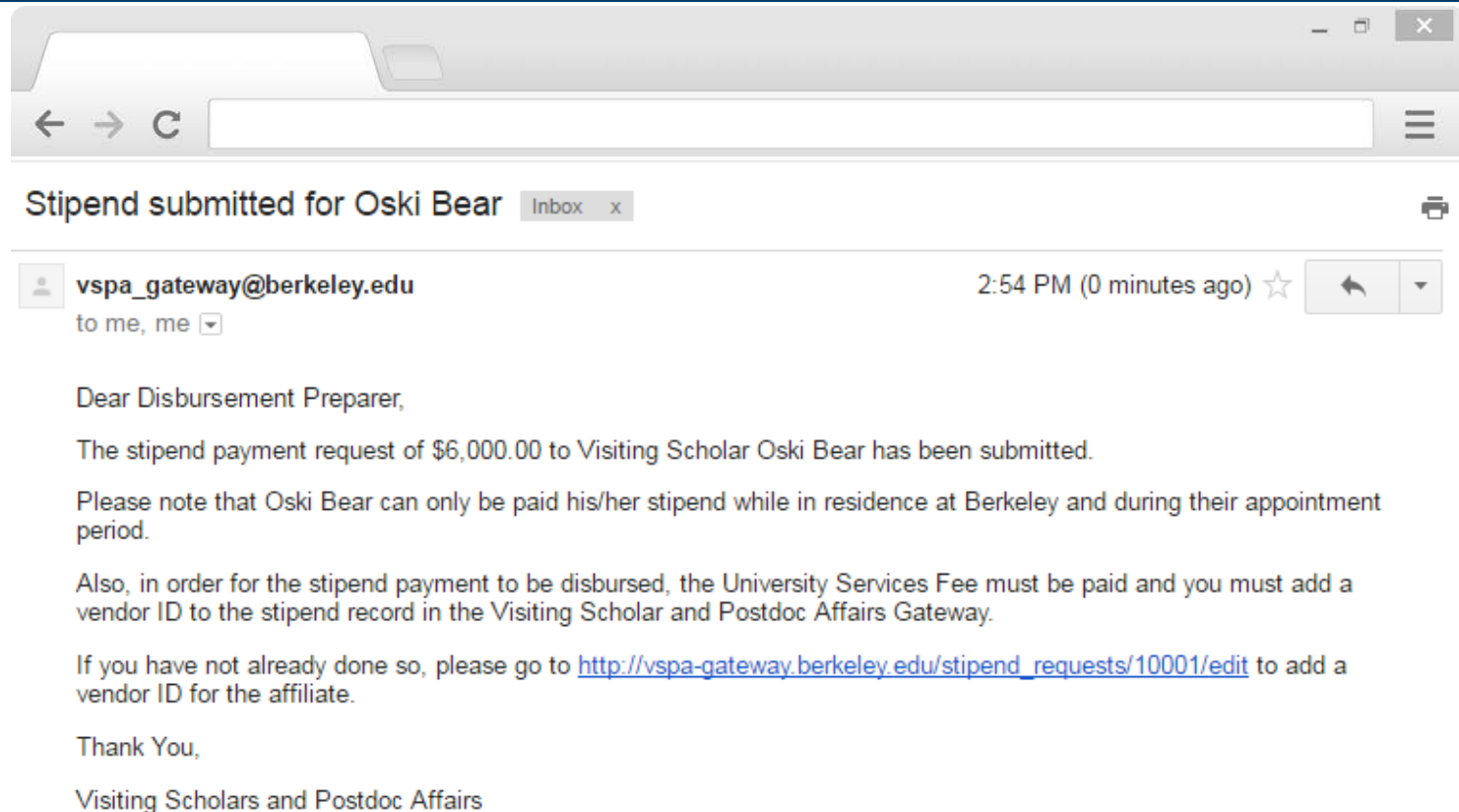to me, me

Dear Disbursement Preparer,

The stipend payment request of $6,000.00 to Visiting Scholar Oski Bear has been submitted.

Please note that Oski Bear can only be paid his/her stipend while in residence at Berkeley and during their appointment period.

Also, in order for the stipend payment to be disbursed, the University Services Fee must be paid and you must add a vendor ID to the stipend record in the Visiting Scholar and Postdoc Affairs Gateway.

If you have not already done so, please go to http://vspa-gateway.berkeley.edu/stipend_requests/10001/edit to add a vendor ID for the affiliate.

Thank You,

Visiting Scholars and Postdoc Affairs

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**

Visiting Scholar/Student Researcher Stipend Disbursement Process

Enter in the **Vendor Number**

Press **Save Changes**

Visiting Scholar/Student Researcher Stipend Disbursement Process

Instead of an email notification to the **Disbursement Preparer**, this on-screen message will appear

Visiting Scholar/Student Researcher Stipend Disbursement Process

University Services Fee Payment Required for Oski Bear Stipend Gateway x

vspa_gateway@berkeley.edu   1:48 PM (0 minutes ago)
to me

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 the **University Services Fee** has been paid for the affiliate's appointment

Visiting Scholar/Student Researcher Stipend Disbursement Process

If all requirements have been met, the VSPA Program approves the stipend disbursement request

Stipend Request Disbursement is ready to be processed   Stipend Gateway   x

vspa_gateway@berkeley.edu   Jul 18 (4 days ago)

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**

Visiting Scholar/Student Researcher Stipend Disbursement Process
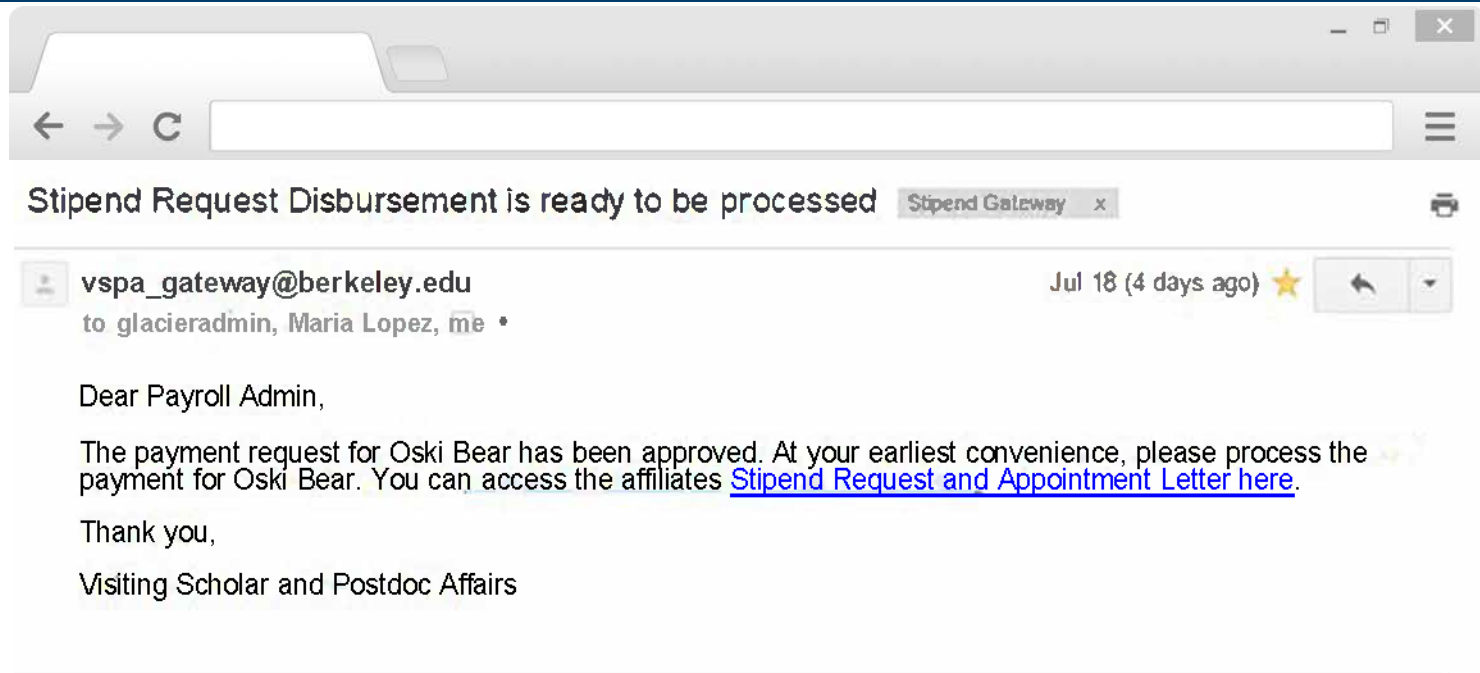
The Payroll Office will receive the above email to process the stipend disbursement request within two weeks of the **Date to Start Payment**

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

VSPA Gateway Help Desk

HOURS Monday-Friday
9am to 4pm

CALL +1 (510) 643-9681

EMAIL vspa@berkeley.edu