

# Following the Money Trail

Part II, Commitments

A Guide to Understanding Graduate Financial Aid Expenditures

GFS User Forum

November 1, 2007

*Presented by the Controller's Office*  
Allison Baird-James, Student Financial Services  
Gary Davis, Business Operations

## Agenda

- Setting the Context
- Student Aid Commitments
- The 285 Expenditure Statement and Commitments on Reports
- The Financial Gateway



## Objectives

- To review the flow of graduate financial support through University systems
- To explain how student aid commitments are determined
- To review student aid and commitment transactions in expenditure reports
- To introduce the new Controller's Office website

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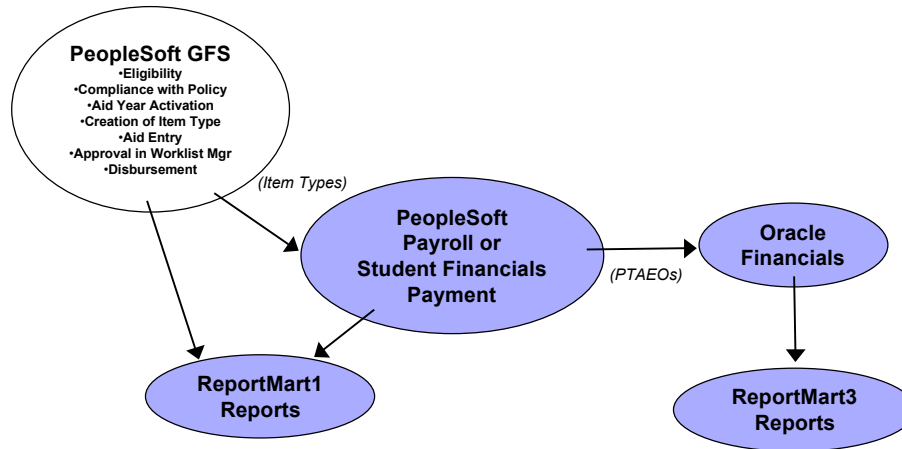


## Part I: Setting the Context

- Overview of the Graduate Financial Support Process
- Types of Support
- Systems Used

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## Overview of the Process



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## Primary Types of Support in GFS

- Assistantship (Grad/Post Doc)
  - Salary
  - Tuition Allowance (TAL)
- Fellowship
  - Tuition
  - Quarterly Stipend
    - Includes Stipend, Standard Charges, ASSU, Health Insurance, Doc Fees, etc.
  - Monthly Stipends (Post Doc/Non-Matric)

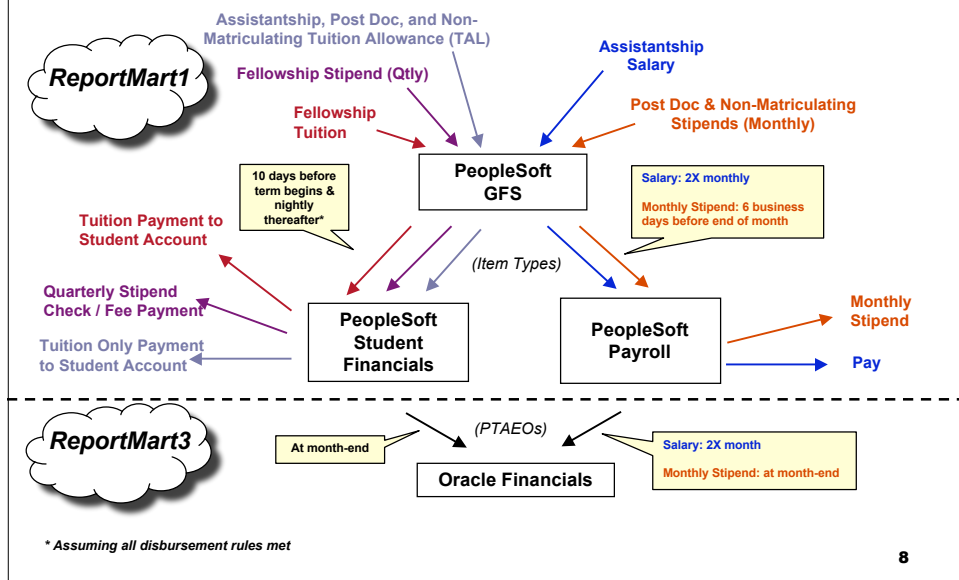
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## Managing the Graduate Support Resources

- Were the right students paid the correct amounts?
  - Departmental authorization
  - University / School policies
  
- Was the support coded correctly?
  - Appropriate account (PTA)
  - Proper type of support (Expenditure Type)
  
- Does it serve the needs of the student while supporting faculty and departmental goals?

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## What systems are involved?



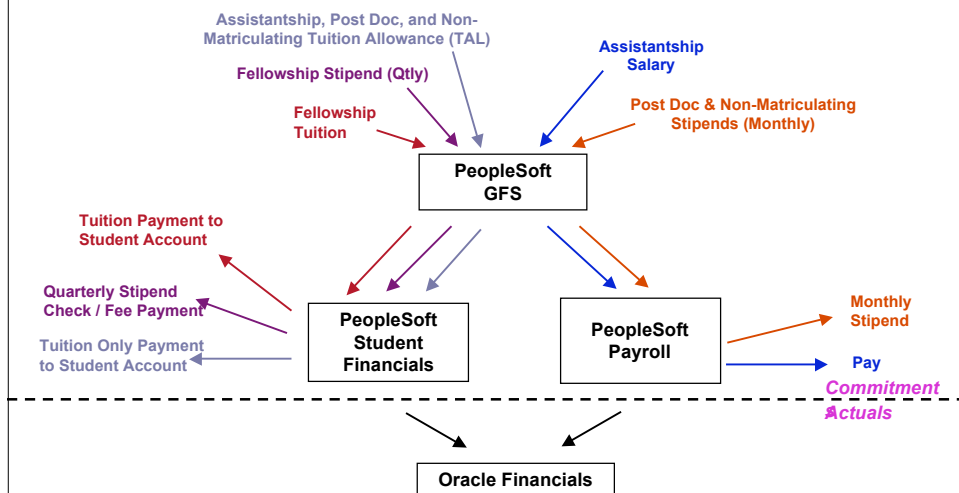
8

## Part II: Student Aid Commitments

- Overview of Commitments
- How Student Aid Commitments are Determined
- Student Aid Commitments on Reports

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## Student Aid Commitments



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## Scope of Commitments

- Hard commitments (also called “encumbrances”) are those calculated by the system, such as:
  - Future salary, as entered in PeopleSoft, allocated based upon Labor Schedules entered in Oracle Financials;
  - Future student aid expenses as entered in GFS, PeopleSoft Financial Aid, or Student Financials modules;
  - Approved purchase requisitions entered in Oracle Internet Procurement.

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## Student Aid Commitments

- Arise from ...
  - **Financial Aid** for Undergraduate and Graduate Students
  - **Assistantships** for Graduate Students and Post-Docs
  - Graduate Student **Fellowships**, including stipends
- Begin after the financial aid is accepted by the student or the aid is approved in GFS
- End when the amount is posted to the student’s account or paid to the student

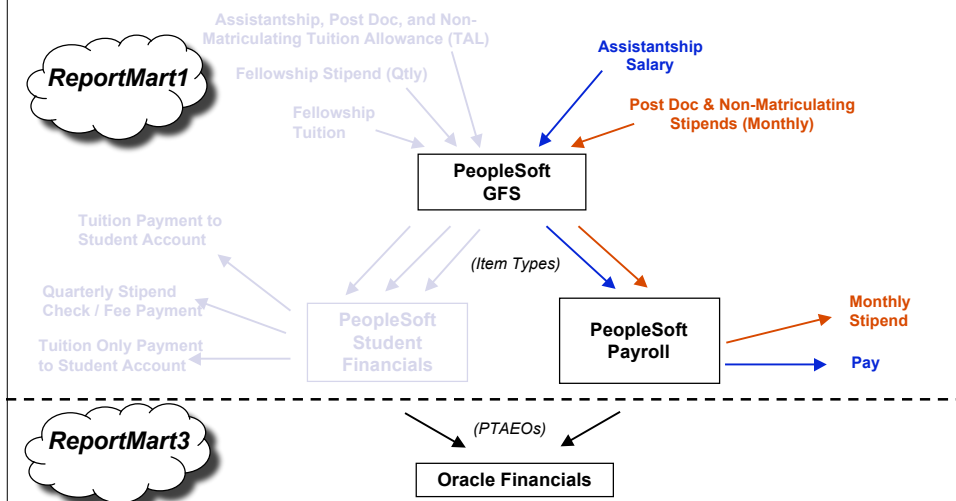
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# How Commitments are Calculated

- Student Aid is entered beginning in August for the following academic year
- Non-Salary Student Aid
  - Includes Financial Aid, TAL, Fellowship Tuition, and Stipends
  - Commitment = fully approved student aid that remains to be posted to student's account for the academic year
- Salary Student Aid
  - Assistantships (RAs and TAs) receive 6 paychecks per term they are working
  - Post Doc and Non-Matriculating Stipends are paid monthly
  - Commitments = remaining paychecks

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# Burdening on Commitments



\* Assuming all disbursement rules met

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## Student Commitments on Reports

Commitment Type	Sponsored/Capital Awards (PTD accounts)	Non-Sponsored Awards (FTD accounts)
<b>Student Aid</b> <ul style="list-style-type: none"> <li>■ Displayed as unique PTAE lines per student per term</li> <li>■ Aid data is <b>updated monthly</b></li> <li>■ GFS salary data is <b>updated twice a month</b></li> </ul>	Shows fully approved commitments entered in PeopleSoft Student Modules (Financial Aid, Student Financials or GFS) (Entered for one academic year; may NOT match the length of a sponsored project)	
	Commitments go through summer term (summer student's assistantship commitments will include the following September's costs, even for an FTD account)	

- Updated non-salary student commitment data *replaces* prior commitment data
- Student salary commitments are reduced when student is paid

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## Student Commitments on Reports

Source Code	Acct Ref	Dept Ref
System where transaction originated:  EFAO: Financial Aid EGFSM: GFS Monthly Stipend EGFSN: GFS Non-Salary EGFSS: GFS Salary (Semi Monthly) ESFS: Student Financials	Term related to the commitment (using PeopleSoft codes)  <b>Example:</b> Current Term = 1082  1 = Century (21st)  0 = Decade (2000's)  8 = Academic Year ('08)  2 = Term 2=Autumn 4=Winter 6=Spring 8=Summer	Student ID number

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## Tuition Allowance (TAL)

TAL cannot be billed to sponsored projects until services have been provided

### *How does TAL appear?*

- At the beginning of the academic year, TAL commitments are created when the TAL is approved, and calculated thru the end of the year
  - Commitments are shown in expenditure type 51975
- When paid to student quarterly, recorded as *Prepaid Tuition Allowance (51960)*
  - The commitment for that quarter is relieved
- At end of term, prepaid TAL is reversed and charged to Tuition Allowance (51975)
  - Infrastructure is charged

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## Part III: Reports

- 285 Monthly Expenditure Statement
  - ReportMart3
- Financial Aid Expense Report
  - ReportMart1

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# FIN\_EXP\_285\_Mo\_Detail\_Statement

- Best report to use to reconcile student aid
- Shows actual expenditures and future commitments
- Also shows past commitments that have not been relieved with actuals

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## Tour of 285 Monthly Detail Statement

Run Date: 14-JUL-2007 1:17 PM  
 Max Rows: 10000  
 Last Close: JUN-2007

STANFORD UNIVERSITY  
 COMMUNICATIONS DEPARTMENT  
 Fiscal Period: Apr 1, 2007 to Jun 30, 2007  
 Information contained in this report is incomplete if the Report Period is after the Last Close

FTA Page: 6  
 Legacy Account: 1ABC123  
 Legacy Fund: 123456  
 User: SPIDEY  
 Database: DW3\_UAT

SALARY COINFIDENTIAL

Category:		Project Info		Task Info		Award Info		Stand'd		Remaining	
Number:		Name:		Name:		AWARD				Balance	
Source	Acct Ref	Dept Ref	Exp-Item Date	Exp-Item Date	Exp-Item Date	Period fiscal To	Actuals-to-date	Subtotal	Commits	Balance	Balance
EGFSN	1058	6384037	30-JUN-2007	30-JUN-2007	30-JUN-2007	Exp. Control			6,500		
EGFSN	1062	5751670	30-JUN-2007	30-JUN-2007	30-JUN-2007	Exp. Control	19,980	(19,980)	6,580		(26,460)
PSOFT	1044	5568762	30-JUN-2007	30-JUN-2007	30-JUN-2007	Exp. Control	(215)	215	1,915		(1,700)
EGFSN	1048	5568762	30-JUN-2007	30-JUN-2007	30-JUN-2007	Exp. Control	2,388	(2,388)			(2,388)
EGFSN	1058	5836557	30-JUN-2007	30-JUN-2007	30-JUN-2007	Exp. Control			216		216
PSOFT	1054	5836557	30-JUN-2007	30-JUN-2007	30-JUN-2007	Exp. Control			216		297
EGFSN	1056	5836557	30-JUN-2007	30-JUN-2007	30-JUN-2007	Exp. Control			258		258
EGFSN	1058	5836557	30-JUN-2007	30-JUN-2007	30-JUN-2007	Exp. Control			258		258
E_BRDN	FY07	0625									(26,998)
											316
							1,170	(1,170)	316		(1,511)
							(1,500)	1,500			4,500
							46,327	(46,327)	11,249		(57,577)
							2,092	(2,092)			(2,092)
							234	(234)			(234)

Document Name: FIN\_EXP\_285\_Mo\_Detail\_Statement.rep      Tab Name: All Detail

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# Tour of 285 Monthly Detail Statement

Run Date: 14-JUL-2007 1:17 PM  
 Mail To: Hiller, Steven  
 Last Close: JUN-2007

STANFORD UNIVERSITY  
 PRT 130, 2007  
 Report Period is after the Last Close

PTA Page: 6  
 Legacy Account: 1ABC123  
 Legacy Fund: 1234456  
 User: SPODEY  
 Database: DW3\_UAT

Category: Project Info  
 Number: 1234567  
 Name: PROJECT

Task Info  
 Task: TASK

Award Info  
 Award: ABCDE  
 Award: AWARD

Source	Acct R#	Dept Ref	Exp-Item Date	JUN 2007 Actuals	Expenditure Category / Type	Period: fiscal To Date through AUG 31, 2007	Outstand'g	Remaining
						Exp Control	Actuals-to-date	Balance
EGFSN	1058	5364037	30-JUN-2007	57340	"Michael Peter"		6,500	
				57340	GFS STANDARD CHRGS		19,980	(26,480)
				57340	SON		(19,980)	1,915
EGFSN	1062	5751870	30-JUN-2007	57510	STUDENT AID		(215)	(1,700)
				57510	GRADUATE STUDENT STIPEND		2,388	(2,388)
PSOFT	1044	5558762	30-JUN-2007	216.00	"Blaine Richard"			216
EGFSN	1046	5558762	30-JUN-2007	216.00	"Blaine Richard"			216
EGFSN				250.00	"Hur Benjamin"			297
EGFSN					"Butler Rhett"			258
EGFSN					"Butler Rhett"			258
EGFSN					"Jones Indiana"			516
EGFSN					"Sutton Paul"			258
E_BRDN	FV07	0525		474.00	STU AID STUDENT HEALTH IHS		2,079	(26,990)
				57840	FB_VA_TOP_OSS			316
				57840	GS HEALTH IHS RECOVERY		1,170	(1,511)
				57840	POST DOC STIPEND		(1,500)	1,500
				52410	STUDENT AID		46,327	(57,577)
				52415	DOMESTIC TRAVEL ALLOW		2,092	(2,092)
				52415	DOMESTIC TRAVEL UNALW		234	(234)

Document Name: FM\_EXP\_285\_Mo\_Detail\_Statement.rep  
 Tab Name: All Detail

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# The Financial Aid Expense Report

Stanford University Reporting: Financial Aid Expense Report

### CONFIDENTIALITY NOTICE

I understand and accept responsibility for complying with the Federal law and University policy concerning the privacy rights of students, student applicants, employees, and job applicants; and I understand that a breach of this agreement can be cause for disciplinary action, up to and including termination of employment.

### Description: (Rpt SFS017)

This report displays PeopleSoft financial aid expense for the academic term or fiscal period selected. You may also specify individual PTAs or emplids.

### Instructions for Processing:

To run this report, select ONE of the process buttons below. First decide if you'd like to run the report by fiscal period or academic term. If you process by Emplid, you may still specify individual PTAs.

Process by Fiscal Period:

Process by PTA for Fiscal Period    Process by Emplid for Fiscal Period    Process for All PTAs (FAIR)

Process by Academic Term:

Process by PTA for Term    Process by Emplid for Term

### Results Sections:

After processing is complete, click on a results section below. All the expense reports can be printed or exported to Excel. The Financial Aid Expense Results are for looking at individual lines of data or further limiting.

**Drill Down:** Within a pivot it is possible to drill down to a lower detail level. To drill down on a column, right-click on the column. Next choose Drill Anywhere from the menu. Finally, choose the field to which you would like to drill. See example at right.

**Subtotals:** When in a pivot you can create subtotals for a column. First, take the report out of Print Preview by clicking on the print preview button (see below). Next click on a column header and click on the sum button (see below).

Sum Button    Print Preview Button

Expense by Fiscal Period    Expense Summary Report    Expense by Student  
 Expense by Academic Period    Financial Aid Expense Results

Located in the GFS Folder in ReportMart1

Journal Date	Project	Task	Award	Exp Type	Item Type
2/31/05	1004264	106	EAFMS	57630	Sch of Me
		108	EAFMS	57630	Sch of Me
				57850	Sch of Me
				57630	Sch of Me
				57402	Sch of Me
				57510	Sch of Me
				57630	Sch of Me
				57860	School of
Grand Total					

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## The Financial Aid Expense Report

Journal Date	Project	Task	Award	Exp Type	Item Type Descr	Amount
09/30/2006	1234567	1	ABCDE	57402	Eng'g Fellowship Tuition	\$7,620
11/30/2006	1234567	1	ABCDE	57402	Eng'g Fellowship Tuition	(\$7,620)
	2468135	1	FGHIJ	57402	Engineerin Tuition Fellowship	\$7,620
01/31/2007	2468135	1	FGHIJ	57402	Engineerin Tuition Fellowship	\$7,620
<b>Grand Total</b>						<b>\$15,240</b>

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## Reconciling a Financial Aid Expense Report to an Expenditure Statement

Journal Date	Project	Task	Award	Exp Type	Item Type Descr	Amount
09/30/2006	1234567	1	ABCDE	57402	Eng'g Fellowship Tuition	\$7,620
11/30/2006	1234567	1	ABCDE	57402	Eng'g Fellowship Tuition	(\$7,620)
	2468135	1	FGHIJ	57402	Engineerin Tuition Fellowship	\$7,620
01/31/2007	2468135	1	FGHIJ	57402	Engineerin Tuition Fellowship	\$7,620
<b>Grand Total</b>						<b>\$15,240</b>

Category	Project Info	Task Info	Award Info
Number	1234567	1	ABCDE
Name	Project 1	Task 1	Award 1

REFERENCE DATA					DMT	EXPENDITURE TYPE	EXPENDITURE	
GL PERIOD	SOURCE	ACCT REF	DEPT REF	EXP ITEM DATE	ACTUALS	CODE	DESCRIPTION	DMT DESCRIPTION
NOV-2006	PSOFT	0275138	05238163	30-NOV-2006	(7,620.00)	7402	GRAD FELLOWSHIP TUITION	Blaine, Rick
					(7,620.00)	57402	TOTAL GRAD FELLOWSHIP TUITION	

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## Reconciling a Financial Aid Expense Report to an Expenditure Statement

Journal Date	Project	Task	Award	Exp Type	Item Type Descr	Amount
09/30/2006	1234567	1	ABCDE	57402	Eng'g Fellowship Tuition	\$7,620
11/30/2006	1234567	1	ABCDE	57402	Eng'g Fellowship Tuition	(\$7,620)
	2468135	1	FGHIJ	57402	Engineerin Tuition Fellowship	\$7,620
01/31/2007	2468135	1	FGHIJ	57402	Engineerin Tuition Fellowship	\$7,620
<b>Grand Total</b>						<b>\$15,240</b>

Category	Project Info	Task Info	Award Info
Number	1234567	1	ABCDE
Name	Project 1	Task 1	Award 1

REFERENCE DATA					DMT	EXPENDITURE TYPE	EXPENDITURE	
GL PERIOD	SOURCE	ACCT REF	DEPT REF	EXP ITEM DATE	ACTUALS	CODE	DESCRIPTION	DMT DESCRIPTION
NOV-2006	PSOFT	10275138	05238163	30-NOV-2006	(7,620.00)	57402	GRAD FELLOWSHIP TUITION	Blaine, Rick
					(7,620.00)	57402	TOTAL GRAD FELLOWSHIP TUITION	

Category	Project Info	Task Info	Award Info
Number	2468135	1	FGHIJ
Name	Project 2	Task 2	Award 2

REFERENCE DATA					DMT	EXPENDITURE TYPE	EXPENDITURE	
GL PERIOD	SOURCE	ACCT REF	DEPT REF	EXP ITEM DATE	ACTUALS	CODE	DESCRIPTION	DMT DESCRIPTION
NOV-2006	PSOFT	10275138	05238063	30-NOV-2006	7,620.00	57402	GRAD FELLOWSHIP TUITION	Blaine, Rick
					7,620.00	57402	TOTAL GRAD FELLOWSHIP TUITION	

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## Commitments on Report

Run Date: 14-JUL-2007 1:17 PM  
 Mail To: Hiller, Steven  
 Last Close: JUN-2007

STANFORD UNIVERSITY  
 EXPENDITURE DETAIL REPORT  
 Fiscal Period: Apr 1, 2007 to Jun 30, 2007  
 Information contained in this report is incomplete if the Report is SALARY CONFIDENTIAL

PTA Page: 6  
 Legacy Account: 1ABC123  
 Legacy Fund: 1234456  
 SPIKEY  
 Database: DWG\_UAT

Category:	Project Info	Task Info	Award Info
Number:	1234567	100	ABCDE
Name:	PROJECT	TASK	AWARD

Source	Acct Ref	Dept Ref	Exp-Item Date	JUN 2007 Actuals	Expenditure Category / Type	Period: fiscal To Date through AUG 31, 2007	Outstand'g	Remaining
						Exp Control Actuals-to-date Subtotal	Commits	Balance
EGFSN	1088	6364037	30-JUN-2007		57340 "Mitchell, Peter"		8,500	
					57340 "Sutton, Paul"			
					57340 "Butler, Rhett"			
					57340 "Jones, Indiana"			
					57340 "Blaine, Richard"			
					57340 "Hur, Benjamin"			
					57340 "Bourne, Jason"	19,980 (19,980)	1,915	(26,480)
					57402 GRAD FELLOWSHIP TUITION	(215) 215	1,915	(1,700)
					57510 GRADUATE STUDENT STIPEID	2,388 (2,388)		(2,388)
PSOFT	1084	5568762	30-JUN-2007	216.00	57630 "Blaine, Richard"			216
EGFSN	1086	5568762	30-JUN-2007		57630 "Blaine, Richard"			216
EGFSN	1088	5568762	30-JUN-2007		57630 "Blaine, Richard"			216
EGFSN	1088	5907571	30-JUN-2007		57630 "Hur, Benjamin"			297
PSOFT	1084	5836557	30-JUN-2007	258.00	57630 "Butler, Rhett"			258
EGFSN	1086	5836557	30-JUN-2007		57630 "Butler, Rhett"			258
EGFSN	1088	5836557	30-JUN-2007		57630 "Butler, Rhett"			258
EGFSN	1088	6364037	30-JUN-2007		57630 "Jones, Indiana"			516
EGFSN	1076	5916093	30-JUN-2007		57630 "Sutton, Paul"			258
					57630			
				474.00	57630 STU AID STUDENT HEALTH INS	24,979 (24,979)	2,019	(26,998)
					57640 FB_VA_Top_GSS		316	
E_BRON	FY07	0525			57640 GS HEALTH INS RECOVERY	1,170 (1,170)	316	(1,511)
					57840 POST DOC STIPEID	(1,500) 1,500		1,500
					STUDENT AID	46,327 (46,327)	11,249	(57,577)
					52410 DOMESTIC TRAVEL ALLOW	2,092 (2,092)		(2,092)
					52415 DOMESTIC TRAVEL UNALW	234 (234)		(234)

Document Name: FIN\_EXP\_265\_Mo\_Detail\_Statement.rep  
 Tab Name: All Detail

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# Commitments After Relief

Reference Data		Exp-Item	JUL 2007	Expenditure Category / Type		Period: fiscal To Date through AUG 31, 2007			Outstand'g	Remaining
Source	Acct Ref	Dept Ref	Date	Code	Description	Exp Control	Actuals-to-date	Subtotal	Commits	Balance
EGFSN	1059	6364037	31-JUL-2007	57340	"Mitchell, Peter"				6,500	
				57340						
				57340	GFS STAIRDARD CHRGS		19,980	(19,980)	6,500	(26,480)
PSOFT	1062	5751870	31-JUL-2007	57402	"Bourne, Jason"					
				57402						
				57402	STU AID COLLEGE TUITION	(1,500)	(215)	(1,715)	6,500	(1,715)
				57510						
				57510	The actual tuition was only \$1,500					
				57510						
PSOFT	1044	5568762	31-JUL-2007	216.00	57630					
EGFSN	1046	5568762	31-JUL-2007		57630					216
EGFSN	1048	5568762	31-JUL-2007		57630					216
EGFSN	1068	5907571	31-JUL-2007		57630					297
PSOFT	1054	5836557	31-JUL-2007	258.00	57630					
EGFSN	1056	5836557	31-JUL-2007		57630					258
EGFSN	1058	5836557	31-JUL-2007		57630					258
EGFSN	1058	6364037	31-JUL-2007		57630					516
EGFSN	1056	5916093	31-JUL-2007		57630					258
				474.00	57630					
				57630	STU AID STUDENT HEALTH INS		24,979	(24,979)	2,019	(26,998)
E_BRDN	FY07	0525		57840	FB_VA_TGP_GSS				316	
				57840						
				57640	GS HEALTH INS RECOVERY		1,170	(1,170)	316	(1,511)
				57840						
				57840	POST DOC STPEID		(1,500)	1,500		1,500
					STUDENT AID		46,327	(46,327)	11,249	(57,577)
				52410						
				52410	DOMESTIC TRAVEL ALLOW		2,092	(2,092)		(2,092)
				52415						
				52415	DOMESTIC TRAVEL UIALW		234	(234)		(234)

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## Summary of PeopleSoft Reports

- **GFS Aid Sum by Money Source (PS\_GFS007)**
  - Provides detailed information about aid entries by Pay Org - PTA
  - Includes Aid Amount and Type, Pay Status, PTA, When Last Updated, Updated By Whom
- **Financial Aid Expense Report (PS\_SFS017b)**
  - Use to reconcile aid amounts by term in GFS to aid amounts by accounting period in Oracle Financials
- **GFS Unapplied Aid Report (PS\_GFS015)**
  - Use to identify unapplied aid
- **NOTE:** Commitments do not appear in PeopleSoft reports

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## Summary of Oracle Reports

- **Expenditure Detail Report (FIN\_EXP\_285)**
  - Reflects one month's detail and summary 'to date' data
  - Includes actual expenditures, expense control, and commitments
- **Quarterly Review and Certification Report (FIN\_EXP\_149)**
  - Includes Salary and Non-Salary detail for multiple months
- **Transaction Detail Report (FIN\_EXP\_279)**
  - Contains many prompts which allow for precise research
- **Payroll Earnings Distribution by PTA (FIN\_LABOR\_170)**
  - Shows distribution of salary
- **Distribution Adjustment Detail (FIN\_LABOR\_247)**
  - Provides explanation about Labor Distribution Adjustments

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## Part IV: The Financial Gateway

- <http://financialgateway.stanford.edu>
  - "fingate"
- Supporting Students section
  - Student Billing
  - Student Funding
  - Student Workers
  - Student Financial Data

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# The Financial Gateway

The screenshot shows the 'Staff Financial Activities' page on the Stanford Gateway to Financial Activities website. The page features a navigation menu on the left with categories like Home, Faculty, Staff, Students, Parents, Vendors/Contractors, and Others. The main content area is titled 'Staff Financial Activities' and includes a search bar, a list of common activities (Finance Fundamentals, Buying and Paying, Reimbursement, Travel, Payroll for Employees, Payroll Administration), and a right-hand sidebar with sections for Applications, Resource Center, Helpful Links, and Bulletins for Staff.

**Staff Financial Activities**

Common Activities | **More Activities**

- Finance Fundamentals**: Need-to-know basics for all financial activities.
  - Chart of Accounts
  - Financial Authority
- Buying and Paying**: Purchasing goods and services, and processing invoices.
- Reimbursement**: Getting reimbursed for business and travel expenses.
- Travel**: Travel resources, procedures, and policies.
- Payroll for Employees**: Reporting your time, leave, and getting paid by Stanford University.
- Payroll Administration**: Payroll administration tasks and resources for department administrators and supervisors.

**Right Sidebar:**

- Search**: Search bar.
- Applications**: Oracle.
- Resource Center**: Training, Quick Steps, Job Aids, Forms, Policy Notes.
- Helpful Links**
- Bulletins for Staff**: Direct Deposit to Multiple Bank Accounts Available Now!, About This New Site, Use Your Stanford ID Card As a Debit Card, Exhaust Building.
- Contacts for Staff**

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# The Financial Gateway

The screenshot shows the 'Supporting Students' page on the Stanford Gateway to Financial Activities website. The page features a navigation menu on the left with categories like Home, Faculty, Staff, Students, Parents, Vendors/Contractors, and Others. The main content area is titled 'Supporting Students' and includes a search bar, a list of resources (University Billing, Student Funding, etc.), and a right-hand sidebar with sections for Applications, Resource Center, Helpful Links, and Bulletins for Staff.

**Supporting Students**

About student billing, student funding, student workers, and student financial data

Overviews | **Quick Steps** | Policy Notes | Resources & Job Aids | Forms | Training

**Start here if you are new** - Introductory information to help you get started:

- University Billing (link to Student - University Bill section)
- Funding for Tuition and Other Fees
- About Student Late Fees, Penalties, & Delinquent Accounts (link to Student - University Bill section)
- What Financial Aid Pays
- About Graduate Student Funding
- Paying Tuition and Other Fees via Payroll Deduction (link to Student - University Bill section)
- When a Third Party Sponsor Pays Tuition (link to Student - University Bill section)
- Processing Fellowship Payments
- Tax Considerations for Students
- Student Awards and Travel and Book Grants

**Right Sidebar:**

- Search**: Search bar.
- Applications**: Oracle.
- Resource Center**: Training, Quick Steps, Job Aids, Forms, Policy Notes.
- Helpful Links**
- Bulletins for Staff**: Supporting Students Bulletin, Direct Deposit to Multiple Bank Accounts Available Now!, About This New Site, Use Your Stanford ID Card As a Debit Card, Archived Bulletins.
- Contacts for Staff**

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# The Financial Gateway

[Stanford Home](#) | [Help@SU](#) | [StanfordWho](#) | [Contact Us](#)

**STANFORD UNIVERSITY** GATEWAY TO FINANCIAL ACTIVITIES

**Supporting Students**  
 About student billing, student funding, student workers, and student financial data

[Overviews](#) | [Quick Steps](#) | [Policy Notes](#) | [Resources & Job Aids](#) | [Forms](#) | [Training](#)

Step-by-step instructions for student support-related tasks:

- [Make Tuition / Other Fee Payments by Enrolling in Payroll Deduction](#) (link to Students - University Bill section)
- [Obtain a Paper Bill](#)
- [Process Fellowship Tuitions in PeopleSoft GFS](#) (PeopleSoft Tutorial AS-9930 - Module 5)
- [Request Subsistence Payment, Travel Grant or Student Award Payment](#)
- [Claim Tax Treaty for Fellowship Payment](#) (link to Students - Tax Information section)
- [Claim Tax Treaty for Salary Payment](#) (link to Students - Tax Information section)

**Navigation Menu:** Home, Faculty, Staff (Account Structure: Chart of Accounts, Banking & Commerce, Buying & Paying, Capital Equipment & Capital Projects, Financial Authority, Financial Reporting Tools, Funds Management, Month End / Year-End Close, Payroll Administration, Payroll for Employees, Petty Cash Administration, Reimbursement, Supporting Students), Tax Compliance @ Stanford, Travel, Students, Parents, Vendors/Contractors, Others.

**Right Side Widgets:** Search, A to Z Index, Applications: Oracle, Resource Center (Training, Quick Steps, Job Aids, Forms, Policy Notes), Helpful Links, Bulletins for Staff (Supporting Students Bulletin, Direct Deposit to Multiple Bank Accounts Available Now!, About This New Site, Use Your Stanford ID Card As a Debit Card, Archived Bulletins), Contacts for Staff.

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# The Financial Gateway

[Stanford Home](#) | [Help@SU](#) | [StanfordWho](#) | [Contact Us](#)

**STANFORD UNIVERSITY** GATEWAY TO FINANCIAL ACTIVITIES

**Supporting Students**  
 About student billing, student funding, student workers, and student financial data

[Overviews](#) | [Quick Steps](#) | [Policy Notes](#) | [Resources & Job Aids](#) | [Forms](#) | [Training](#)

Condensed policy information related to supporting students:

- [University Billing Policy](#)
- [GFS \(Graduate Financial Support\) Policy Manual](#)

**Navigation Menu:** Home, Faculty, Staff (Account Structure: Chart of Accounts, Banking & Commerce, Buying & Paying, Capital Equipment & Capital Projects, Financial Authority, Financial Reporting Tools, Funds Management, Month End / Year-End Close, Payroll Administration, Payroll for Employees, Petty Cash Administration, Reimbursement, Supporting Students), Tax Compliance @ Stanford, Travel, Students, Parents, Vendors/Contractors, Others.

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STANFORD GATEWAY TO FINANCIAL ACTIVITIES UNIVERSITY

**Supporting Students**  
About student billing, student funding, student workers, and student financial data

Overview Quick Steps Policy Notes Resources & Job Aids Forms Training

Links, tools and reference materials related to supporting students:

- Stanford ePay (link to Students - University Bill section)
- Tuition and Other Fee Schedule (link to Students - University Bill section)
- University Accounting Services, LLC Web Site (Exit Counseling for Loan Borrowers)
- Financial Aid Offices (link to Students - Loans, Scholarships & Other Financial Aid section)
- Tax Credit Reporting Service for Students (<http://www.1099-t.com>)
- StanfordCardPlan
- Salary Tax Treaties and Forms - for Non-Resident Alien Students (link to Students - Tax Information section)
- Follow the Money Trail - A Guide to Understanding Graduate Financial Aid Expenditures
- Graduate Financial Support (GFS) FAQs
- Related Reports

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STANFORD GATEWAY TO FINANCIAL ACTIVITIES UNIVERSITY

**Supporting Students**  
About student billing, student funding, student workers, and student financial data

Overview Quick Steps Policy Notes Resources & Job Aids Forms Training

Downloadable and online forms related to supporting students:

- SU-21: Fellowship / Award Form (not to be used for payment for services)
- 1099-T (online access to your IRS tax information)
- Third Party Contract Application (for organizations sponsoring students)
- Form 8233 (federal tax treaties for salary payments)
- W-9BEN (federal tax treaties for fellowship payments)

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# The Financial Gateway

Stanford University Gateway to Financial Activities

## Supporting Students

About student billing, student funding, student workers, and student financial data

Overview Quick Steps Policy Notes Resources & Job Aids Forms Training

Online tutorials, classroom training, and related materials:

- Tutorial: [PeopleSoft Student Administration Basics](#)
- Manual: [PeopleSoft Student Administration Basics](#)
- Tutorial: [PeopleSoft Graduate Financial Support \(GFS\) for Read Only Access](#)
- Manual: [Graduate Financial Support \(GFS\) Read Only](#)
- AS-8030: [Graduate Financial Support \(GFS\) Policy and Entry](#)
- User Guide: [PeopleSoft Graduate Financial Support \(GFS\) Entry](#)
- Tutorial: [Worklist Manager for GFS Approvers](#)
- User Guide: [Workflow Home for GFS Approvers](#)

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## Questions? Problems?

- Questions about commitments?
  - First, ask the person who entered the commitment
  - If you don't know who that is, submit a HelpSU to PeopleSoft SA
- Questions about GFS?
  - Submit a HelpSU to PeopleSoft SA
- Questions about ReportMart3?
  - Submit a HelpSU to ReportMart3



# Following the Money Trail

Part II, Commitments

*Presented by the Controller's Office*  
Allison Baird-James, Student Financial Services  
Gary Davis, CO Business Operations