Third Party Contract Information

The University initiates a Third Party Contract (TPC) whenever a sponsor requires an invoice to pay fees to Stanford on a Student's behalf. The process is managed by Student Financial Services (SFS). See the Student Financial Services website for details about the TPC process. Undergrads (who have government sponsorship) and Graduate Students, except Visiting Student Researchers, can take advantage of the TPC process.

Once a Third Party Contract has been set up by SFS, the amount the sponsor has committed to pay is credited to the student's account and the sponsor is billed. TPC information must be entered in GFS on Info Only aid lines for three main reasons: 1) so that TPC support is taken into account when other aid is awarded, 2) to ensure students receive a health insurance subsidy when eligible, and 3) to provide data on student funding for the department, School and University. Currently, Schools/Departments are asked to enter the Info Only aid lines.

If there is ever a question about the TPC support a student is receiving, email tpcsupport@stanford.edu which will be routed to the appropriate analyst in SFS.

Third Party Contracts Report

A TPC Report has been published in BI, Third Party Contracts Report (PS_GFS034), to give Schools/Departments the ability to review TPC details for individual students and monitor the accuracy of Info Only lines entered in GFS.   The report can be processed by School or Department. There are 3 results sections available after the report has been processed:

- **TPC Report** – the left side displays details of TPC contract that have been entered in the billing system. The right side displays any Info Only aid lines have been entered in GFS for the corresponding term. This can help you confirm that accurate Info Only aid lines have been entered without having to navigate to GFS Aid Entry for each student. Can be exported as a PDF.
- **TPC Data** –table which shows TPC data for individual students, as well as dates detail. Can be exported to Excel.
- **TPC Results** – raw data that can be used to further limit and filter the data.

Issues to Consider When Entering Info Only Aid Lines

- A Third Party Contract includes only the specific charges the sponsor or agency has agreed to pay (tuition, health insurance, and other fees). *If the sponsor is also providing a stipend directly to the student, it will not be reflected on the TPC report.* It is appropriate to enter an Info Only line for the stipend into GFS in order to reflect the student's full support and to ensure students receive a health insurance subsidy when eligible. Departments/Schools should contact the students on their TPC report to ask if the fellowship award includes stipend payments sent to the student directly. If so, after receiving a copy of the award letter for reference, the School/Department should enter an Info Only aid line in GFS for the stipend amount.
- Third Party Contracts are entered in the billing system one quarter at a time. If you are reasonably sure the student will continue to receive the support through future quarters, it is acceptable to enter the Info Only lines in GFS for future quarters.
- Sponsors can change their sponsorship details, or new students can be added, throughout the quarter. It is important to check the TPC Report regularly for updates. There is an "original effective date" and

"last activity date" associated with each Contract entry and included on the report to help facilitate that process. SFS enters all TPC applications that have been submitted by the first billing date for the quarter (August 20 for fall, November 20 for winter, February 20 for spring and May 20 for summer) so it is appropriate to wait until that date to start reviewing TPC support for that quarter. Additional applications are processed after this time as they are submitted.

- TPC support is always entered on the Fellowship Stipend and/or Tuition tabs. (Assistantships cannot be entered as "Info Only" and TPC support is never for an Assistantship.)
- Pay Org is a required field in GFS. You can use your School's Pay Org or FCEY (Financial Aid's Pay Org).
- A PTA is not required for Info Only lines, although you do have to click on the Detail button before you'll be able to save. Exception: See Issues related to Health Insurance and the Subsidy Process below.
- Be sure to check the "Info Only" box to ensure that the aid line won't disburse. Info Only aid lines should be completed and routed. All Info Only aid lines require Home Department Approval. Info Only aid lines do not require financial approval, unless a PTA was entered (i.e. for health insurance payments).

Issues related to Health Insurance and the Subsidy Process

- Info Only aid lines entered on the Stipend Tab will generate a Health Insurance Subsidy if the aid line is completed/approved prior to the billing deadline for the quarter, meets the requirements for eligibility, the student has not waived health insurance, and the sponsor has not already paid the full amount. The health insurance subsidy process which runs nightly will automatically create the subsidy aid line.
- If the TPC contract includes payment for Health Insurance, the Info Only aid line for the health insurance payment must include an Item Type with the Charge Priority HLTHONLY so the subsidy process will recognize it as an insurance payment when calculating the student's subsidy eligibility. Item types require a PTA, so this aid line will be routed to a financial approver and will appear in GFS reports for that PTA, but the PTA will not be charged. The School/Department can use the item type that they normally use for health insurance. If the School/Department does not have such an item type, they can use the FAO item type "881801000001" and include the comment "TPC Info Only" under the Transaction Info button on the WF Transaction Tab to facilitate approval.
- If you have questions or concerns about the student's subsidy eligibility please email grad-insurance@stanford.edu.

TPC Invoicing, Payment and Collection

- Sponsors are sent their TPC invoice via encrypted email once per term after the Final Study List deadline to ensure accuracy of charges. TPC supported students are sent an email notification that their sponsor has been invoiced for their term support.
- Payment of the TPC invoice is expected 30 days after invoicing, and payment methods are included on the invoice. If a sponsor has not paid the term invoice by the payment due date, SFS contacts the sponsor to discuss payment. The student will be advised of the sponsors' non-payment only if their sponsor will not reply to our request for payment.
- Since SFS's action of entering the TPC contract results in a credit on the student's account, the account is considered in good standing for the term. No late fees or negative holds are placed on the student account. However, if a TPC application was submitted after the University Bill due date, late fees and holds may apply.
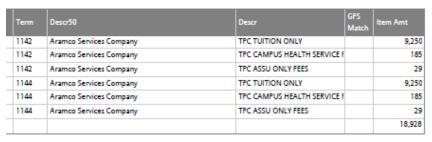
- If a sponsor has not paid a prior term TPC invoice and we have no promise to pay from the sponsor, SFS will reverse the TPC credit on the student's account for the prior term and not enter support for the current or future terms. The student is given 30 days to secure payment for the prior term once the TPC credit has been reversed. Once payment is received, SFS will enter the support for the current term and may remove any hold and late fees from the student's account.

Best Practices for Data Entry

1. Review the TPC Report to identify students for whom a Third Party Contract has been processed (left side of the report) and corresponding Info Only aid lines have not been entered in GFS.

In this example TPC support has been entered for both autumn and winter quarters, but no Info Only aid lines have been entered in GFS:

Term	Descr50	Descr	GFS Match	Item Amt	Aid Year	Strm	Stf Gf Aid Ident	Aid Seq Seq	Amount
1142	Aramco Services Company	TPC TUITION ONLY		9,250					#Value
1142	Aramco Services Company	TPC CAMPUS HEALTH SERVICE F		185					
1142	Aramco Services Company	TPC ASSU ONLY FEES		29					
1144	Aramco Services Company	TPC TUITION ONLY		9,250					
1144	Aramco Services Company	TPC CAMPUS HEALTH SERVICE F		185					
1144	Aramco Services Company	TPC ASSU ONLY FEES		29					
				18,928					

In this example there are some Info Only entries in GFS, but the amounts do not match:

Term	Descr50	Descr	GFS Match	Item Amt	Aid Year	Strm	Stf Gf Aid Ident	Aid Seq Seq	Amount
1142	Agency for Science, Technology & Research (A*STAR)	TPC TUITION ONLY	Y	3,940	2014	1142	TPC ASTAR	TUT001-1	3,940
1142	Agency for Science, Technology & Research (A*STAR)	TPC HEALTH INSURANCE FEE	Y	1,312	2014	1142	TPC ASTAR Ins	STP001-1	1,312
1142	Agency for Science, Technology & Research (A*STAR)	TPC CAMPUS HEALTH SERVICE F	Y	185	2014	1142	TPC ASTAR Fees	STP002-1	185
1142	Agency for Science, Technology & Research (A*STAR)	TPC ASSU ONLY FEES	Y	29	2014	1142	TPC ASTAR Fees	STP002-2	29
1144	Agency for Science, Technology & Research (A*STAR)	TPC TUITION ONLY		6,895	2014	1144	TPC ASTAR	TUT001-1	2,775
1144	Agency for Science, Technology & Research (A*STAR)	TPC HEALTH INSURANCE FEE	Y	1,312	2014	1144	TPC ASTAR Ins	STP001-1	1,312
1144	Agency for Science, Technology & Research (A*STAR)	TPC CAMPUS HEALTH SERVICE F	Y	185	2014	1144	TPC ASTAR Fees	STP002-1	185
1144	Agency for Science, Technology & Research (A*STAR)	TPC ASSU ONLY FEES	Y	29	2014	1144	TPC ASTAR Fees	STP002-2	29
				13,887					9,767

2. When there is no entry, or the TPC amount is greater than what has been entered in GFS it is necessary to either update or enter Info Only aid lines in GFS.
   a. Enter lines on the Fellowship Stipend and/or Fellowship Tuition Tabs.
   b. In the Ident Field, start each line with "TPC" and add a description to make it easier to review TPC lines in the future.
   c. It is ok to group categories together (e.g., Campus Health Service Fee and ASSU Only Fees can be added together in one aid line in GFS) although creating individual aid lines will make it easier to identify exact matches in the report.
   d. When the sponsor is paying all or some portion of the Health Insurance Fee, that information must be entered on its own aid line and a PTA with charge priority of HLTHONLY must be used. See Issues Related to Health Insurance and the Subsidy Process above.
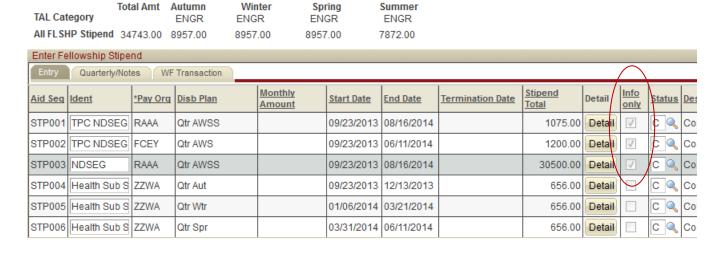
e. A Pay Org is necessary to save the aid line, even when the aid line is "Info Only." You may use Financial Aid's Pay Org of FCEY to denote "outside aid" if you wish.

f. Although a PTA is not required in most cases, you do need to click on the Detail button in order to save. (Remember, a PTA *is* required for Health Insurance.) Simply click Detail and click OK without making changes.

g. Be sure to check the "Info Only" box.

h. Mark the lines as complete and save the transaction.

i. New lines will be routed for Home Department approval. Financial approval is not needed, with the exception of aid lines for Health Insurance.

Here's an example of an entry for TPC Tuition support for A/W/Sp that is pending Home Department approval:

TAL Category	Total Amt	Autumn GR	Winter GR	Spring GR	Summer GR
All FLSHP Tuition	8325.00	2775.00	2775.00	2775.00	

Enter Fellowship Tuition

| Entry | Quarterly/Notes | WF Transaction |

Aid Seq	Ident	*Pay Org	Disb Plan	Total Tuition	Detail	Info only	Status	Description	Approval Status		
TUT001	TPC A*STAR	FCEY	Qtr AWS	8325.00	Detail	✓	C 🔍	Complete	Pending	+	−

In this example of entries on the Stipend tab the student is receiving support for Fees (STP001) and Health Insurance (STP002) through TPC, as well as a quarterly stipend (STP003) directly from the sponsoring agency. As a result of the Info Only aid lines that were entered, the student is also receiving the Health Insurance Subsidy each quarter.

TAL Category	Total Amt	Autumn ENGR	Winter ENGR	Spring ENGR	Summer ENGR
All FLSHP Stipend	34743.00	8957.00	8957.00	8957.00	7872.00

Enter Fellowship Stipend

| Entry | Quarterly/Notes | WF Transaction |

Aid Seq	Ident	*Pay Org	Disb Plan	Monthly Amount	Start Date	End Date	Termination Date	Stipend Total	Detail	Info only	Status	Des
STP001	TPC NDSEG	RAAA	Qtr AWSS		09/23/2013	08/16/2014		1075.00	Detail	✓	C 🔍	Co
STP002	TPC NDSEG	FCEY	Qtr AWS		09/23/2013	06/11/2014		1200.00	Detail	✓	C 🔍	Co
STP003	NDSEG	RAAA	Qtr AWSS		09/23/2013	08/16/2014		30500.00	Detail	✓	C 🔍	Co
STP004	Health Sub S	ZZWA	Qtr Aut		09/23/2013	12/13/2013		656.00	Detail	☐	C 🔍	Co
STP005	Health Sub S	ZZWA	Qtr Wtr		01/06/2014	03/21/2014		656.00	Detail	☐	C 🔍	Co
STP006	Health Sub S	ZZWA	Qtr Spr		03/31/2014	06/11/2014		656.00	Detail	☐	C 🔍	Co

Resources

- For questions about an individual student's support contact tpcsupport@stanford.edu.
- For questions about health insurance subsidy contact grad-insurance@stanford.edu.
- For technical problems with GFS data entry or approval, please submit a HelpSU ticket. Choose Request Category "Administrative Aplications" and Request Type "PeopleSoft GFS."