Tracking 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 web site for details about the TPC process. Graduate Students, as well as Visiting Student Researchers and Undergrads, can take advantage of the TPC process in certain situations.

Once a Third Party Contract has been set up by SFS, a temporary credit in the amount the sponsor has committed to pay is posted to the student’s account and the sponsor is billed. TPC information must be entered in GFS as Info Only aid lines for three reasons:

- so that TPC support is taken into account when other aid is awarded,
- to ensure students receive a health insurance subsidy when eligible, and
- to provide data on student funding for the department, School and University.

Schools/Departments are responsible for entering the Info Only aid lines in GFS. Send questions about student funding to TPC_Support@stanford.edu which will be routed to the appropriate analyst in SFS.

Third Party Contracts Report

A TPC Report has been published in BI 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 in Excel.

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 starts entering all TPC applications that have been submitted after the first billing date for the quarter (August 20 for autumn, 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 for Info Only lines. You can use your School’s Pay Org or FCEY (Financial Aid’s Pay Org) to signify that it is an outside award.
- A PTA is not required for Info Only lines.

**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 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, enter a separate Info Only aid line for the Health Insurance payment. When you click the Info Only checkbox, a Health Only checkbox becomes available. Checking it indicates this aid line is for a health insurance

- If you have questions or concerns about the student’s subsidy eligibility please email cardinalcaresubsidy@stanford.edu.

**TPC Invoicing, Payment and Collection**

- Sponsors are sent notification via encrypted email when their TPC invoice is available for review and download 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 temporary 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:

<table>
<thead>
<tr>
<th>Term</th>
<th>Desc50</th>
<th>Descr</th>
<th>GFS Match</th>
<th>Item Amt</th>
</tr>
</thead>
<tbody>
<tr>
<td>1142</td>
<td>Aramco Services Company</td>
<td>TPC TUITION ONLY</td>
<td>Y</td>
<td>9,250</td>
</tr>
<tr>
<td>1142</td>
<td>Aramco Services Company</td>
<td>TPC CAMPUS HEALTH SERVICE</td>
<td>Y</td>
<td>185</td>
</tr>
<tr>
<td>1142</td>
<td>Aramco Services Company</td>
<td>TPC ASSU ONLY FEES</td>
<td>Y</td>
<td>29</td>
</tr>
<tr>
<td>1144</td>
<td>Aramco Services Company</td>
<td>TPC TUITION ONLY</td>
<td>Y</td>
<td>9,250</td>
</tr>
<tr>
<td>1144</td>
<td>Aramco Services Company</td>
<td>TPC CAMPUS HEALTH SERVICE</td>
<td>Y</td>
<td>185</td>
</tr>
<tr>
<td>1144</td>
<td>Aramco Services Company</td>
<td>TPC ASSU ONLY FEES</td>
<td>Y</td>
<td>29</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Term</th>
<th>Desc50</th>
<th>Descr</th>
<th>GFS Match</th>
<th>Item Amt</th>
</tr>
</thead>
<tbody>
<tr>
<td>1142</td>
<td>Agency for Science, Technology &amp; Research (ASTAR)</td>
<td>TPC TUITION ONLY</td>
<td>Y</td>
<td>3,640</td>
</tr>
<tr>
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<td>Agency for Science, Technology &amp; Research (ASTAR)</td>
<td>TPC HEALTH INSURANCE FEE</td>
<td>Y</td>
<td>1,212</td>
</tr>
<tr>
<td>1142</td>
<td>Agency for Science, Technology &amp; Research (ASTAR)</td>
<td>TPC CAMPUS HEALTH SERVICE</td>
<td>Y</td>
<td>185</td>
</tr>
<tr>
<td>1142</td>
<td>Agency for Science, Technology &amp; Research (ASTAR)</td>
<td>TPC ASSU ONLY FEES</td>
<td>Y</td>
<td>29</td>
</tr>
<tr>
<td>1144</td>
<td>Agency for Science, Technology &amp; Research (ASTAR)</td>
<td>TPC TUITION ONLY</td>
<td>Y</td>
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</tr>
<tr>
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<td>Agency for Science, Technology &amp; Research (ASTAR)</td>
<td>TPC CAMPUS HEALTH SERVICE</td>
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</tr>
<tr>
<td>1144</td>
<td>Agency for Science, Technology &amp; Research (ASTAR)</td>
<td>TPC ASSU ONLY FEES</td>
<td>Y</td>
<td>29</td>
</tr>
</tbody>
</table>

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. In the Identifier Field, start each line with “TPC” and add a description to make it easier to review TPC lines in the future.
   b. 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.
   c. When the sponsor is paying all or some portion of the Health Insurance Fee, that information must be entered on its own aid line with the Health Only box checked.
   d. 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.
   e. Be sure to check the “Info Only” box.
   f. Save & Submit the aid line for Home Department Approval.