POLICY AND PROCEDURES FOR NOTICE OF AWARD (NOA) AND DOCTORAL PAYMENT REQUEST (DPR)

Introduction

As the university moves towards People Soft as a replacement for DEFINE, a new process has been established to streamline the processing of stipends and tuition/fee payments for colleges and departments. The Notice of Award (NOA) is used for processing stipends and tuition for undergraduate and graduate students. The Doctoral Payment request (DPR) is used for processing stipends and tuition for doctoral students. This new process will give the colleges/departments more flexibility and will ensure students are paid in a timely manner.

Policy

Effective Summer 2013, all stipends (like tuition/fee payments) will disburse on Banner instead of through the DEFINE system. The ASAP process will no longer be used. The new NOA and DPR forms are available at Share Point Public Folders and can be filled out online and printed for appropriate routing. This new process will allow us to disburse stipends to students in a more efficient way and ensure they are paid in a timely manner.

Share Point Public Folders

To access the revised forms in Share Point, follow these steps:

2. Login using your university abc123 and passphrase
3. Click on Financial Aid Scholarship Office Folder
4. For Undergraduate/Graduate click on Notice of Award – Revised 9.18.13
   a. To edit: Click on ‘Edit in Excel’ and select ‘Open URL’ in the pop-up confirmation
5. For Doctoral Fellowship Payment Revision click on Doctoral Payment Request form – Revised 9.18.13
   a. To edit: Click on ‘Edit in Excel’ and select ‘Open URL’ in the pop-up confirmation
6. Note that you will enter information about the student but you will not be able to save the file. Once you have entered the data on the form, print the form and then you will reset for the next student.
7. You will need to complete a form for each student

Completing the Forms

All colleges and department awarding stipends and/or tuition/fee payments will use the revised NOA or DPR forms when submitting payment information for each academic year to Student Financial Aid. The college/department will need to determine if the student is a U.S. Citizen or International student before completing the form. For both the NOA and DPR, you will need to choose the appropriate tab at the bottom to complete the form. See below:

Bottom of the page – click on the appropriate tab for U.S. Citizen/Permanent Res or International. It is important to select the appropriate tab for routing purposes.
Once you select, the appropriate tab, you will see the follow at the top of the screen. This example is the Scholarship Notice of Award – U.S. Citizen or Permanent Resident (Green Card Holder).

There are four possible forms. It is imperative that the correct forms are used because it determines the routing of the form once it leaves the college/department. International students may be required to pay taxes on their stipend and must be routed different.

Once you have the appropriate form, complete the document and print for signatures and routing. You will not be able to save the document for each student. Please remember that you will need to complete a form (NOA and DPR) for each student receiving an award.

All blocks must be completely filled on the appropriate form as new features have been added to the forms to capture information needed by Payroll, Research Service Centers and the Scholarship Office. When completing the forms, please pay attention to the lines with drop down boxes from which a selection is made. For example, each form contains a “Select Action Type” box listing four choices from which to choose. You will need to select whether this is the original, an amount change, an account change or cancellation. See the example below:

Other areas on the DPR with a drop down box is the “Residency Status (In-State/Out-of-State Tuition) and Visa Type. On the NOA, there is a drop down box for Student Status, Residence Status for Tuition, Citizen Status, and Visa Type for
International students. Forms submitted to the approving agency with any of the areas left blank will be considered incomplete and returned to the originating department. Please do not submit any forms where the award period overlaps fiscal years as Banner is set up to handle one fiscal/academic year at a time. For example, if a department awards a student for spring 2013 and summer 2013 and will then award again for Fall 2014, a separate form will need to be submitted for Fall 2014 because it is part of a new fiscal/academic year.

Another significant change includes sum formulas that will automatically add the total from the three semester fields.

Routing the Forms

Please note that forms must be routed for signature based on citizenship status. Following is the routing for each form and citizenship type:

**U.S. Citizen**

Complete NOA or DPR - Obtain Principal Investigator or Department Director Signature

→ Send to Student for signature - student signs and submits back to Department

→ Department submits to Research Service Center (RSC) for signature

→ RSC submits signed form to Scholarship Office for processing

→ Scholarship Office processes – places award on Banner – disburses at appropriate dates for semester(s)

If funded via 19 account – send directly to Scholarship Office

**International Student**

Complete NOA or DPR - Obtain Principal Investigator or Department Director Signature

→ Send to Student for signature – student signs and submits back to Department

→ Department submits to Payroll Office – to determine NRA Tax amounts for stipends.

→ Payroll submits to Research Service Center (RSC) for signature

→ RSC submits signed form to Scholarship Office for processing

→ Scholarship Office processes – places award on Banner – disburses at appropriate dates for semester(s)

If student is only receiving a tuition benefit – send directly to RSC

Special Note: A scholarship is taxable to the extent it exceeds the amount paid for tuition, required fees, and books. The student scholarship tax rate is 14%. Tax relief may be available to students who are eligible for tax treaty benefits.
based on the active treaty between the US and the student’s citizenship home country. An NRA tax field has been added to the International Student tab on the NOA and DPR. Payroll will determine the tax amount on the stipend awarded and annotate the field. If taxes are to be deducted, it will automatically be deducted at the time of the stipend payment to the student.

**Tuition Only Payments:** If tuition only is paid for international students, regardless of the account use (26 or 19), the form does not route to Payroll, but goes directly to the Research Service Center. There is a statement at the bottom of the form next to the word Approvals that addresses tuition only.

**Timeframe for Submitting Stipends/Tuition and Fee Payments**

Notice of Awards listing payments for the entire academic year should be submitted through the routing chain by the second week of June to ensure payments will fit within the students’ cost of attendance/need. This will also allow the scholarship office time to process/award to ensure funds will disburse on time starting with September 1 and subsequent payments. Payment schedules have been set up to pay on the first of each month. There will be four payments in the fall semester, beginning September 1st. There will be five payments in the spring semester beginning January 1st. There will be three payments in the summer semester beginning June 1st. If a student is to be paid a lump sum for any given semester, the award will be modified to pay out entirely at the time the award is added to Banner or the first disbursement date of the semester.

Any new approved grants after September 1st will need to arrive in the Scholarship Office no later than two weeks before the next scheduled payment (1st of the next month). Please note that late submission of awards may result in disbursed loans having to be reduced or cancelled in order to fit a departmental award within a student’s cost of attendance. Instead of a student receiving additional money, the award will be used to pay off the balance that may occur as a result of the loan reduction or cancellation. Departments are strongly encouraged to advise students receiving stipends that financial aid already awarded may need to be adjusted.

**Changes to amount or account**

Changes to amounts or account numbers must be approved by the Research Service Center. Therefore, an NOA or DPR indicating the action type and effective date must be submitted through the approving and processing channels. Changes should be as minimal as possible to avoid disruption in the payment process. Switching from one account to another should be done prior to the upcoming disbursement (1st of the month) so that detail codes can be switched and the appropriate account is debited for the payment to the student. If changes are made after the fact, it will likely result in reconciliation issues for the accounts.

**Direct Deposit**

Students are strongly encouraged to set up direct deposit to ensure timely payments. Student can set up direct deposit through ASAP.

**Important Note about Stipends and Outstanding Tuition and Fee Charges:**

Students who fail to pay their full tuition and fees balance are subject to various actions at the discretion of the University, including denial of readmission and withholding of transcripts, degree and grades, facilitated by the placement of a university hold on the student record. **UTSA reserves the right to apply a students’ stipend to any outstanding balance due at the time of the disbursement.**

However, the department may request an exception be granted so that a student with an outstanding balance can receive all or a part of their stipend prior to their balance being paid in full. The department must identify circumstances
beyond the students’ control that necessitates their need for delay of repayment of their student obligation. This exception will not be granted for every student receiving a Stipend or for every payment to a single student.

To submit a request for consideration of an exception to this policy, send an e-mail to the Student Information System Financial Accounting Manager (Ann Roberts), along with the reason the exception may be warranted. Please submit 2-3 business days in advance of the scheduled payment to allow processing time.