Stipends & Scholarships

ASP Meeting
September 22, 2021

Presented by: Janet Parks

Stipend

- A set amount of money paid directly to the participant or fellow

- Granting agencies
  – Use the word "Stipend" many different ways
  – Some agencies have specific guidelines for participant stipends/fellows

How are Stipends paid to Students?

- Stipends for trainings, workshops, conferences & fellowships are paid through **SAE** (Student Award Entry system in mainframe)
  - Cash award given for participating in a training activity, workshop or conference, or support for a fellow
  - Student **does not** have a work component, no services are required of the student in order to receive the award

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When to pay Stipends through Payroll?

- If there is a past, present or future work requirement, the stipend payment is taxable and must be paid as compensation through Payroll
- If the participant support costs are awarded as a supplement to the PI's research project – pay through Payroll. Examples:
  - NSF REU supplements
    - normally 1-2 students working on the parent research project
    - pay through Payroll
  - NSF REU sites
    - stand alone award
    - several students
    - pay through SAE

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Research Subject Fees

- Sometimes budgeted as stipends
  - Not a stipend
- Fees (cash incentive) paid to participants for completing a survey or study
- Paid through AP using **SC0086 Research Subject/Participant Fees**
- Follows **FASOP: AS-13** Cash Incentive Payments ($50 Or Less) To Participants In Sponsored Programs

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Scholarship Costs

- Tuition & Fees
  - Does not normally include **required fees**, **health insurance** and **nonresident fees** therefore, these costs must be specifically listed in approved budget

- Subsistence (housing & meals)

- Textbooks

➢ Paid through an exemption on scholarship grant (FN90)
  - Not paid directly to the student
  - Loaded as an exemption on the student's account using TRX code (exception – textbooks are paid through AP and reported to Financial Aid & Scholarships)

Non-Scholarship Costs

- Costs directly associated with attending conferences, symposia, or training programs
- Travel for project activity (includes field trips)
- Training materials and lab supplies

➢ Paid on non-scholarship grant (not FN90)

Scholarships

- Must be listed in the approved budget
- Must have established criteria
  - Standards that the recipient must meet to initially qualify for and continue to receive an award.
- Must use a selection committee
- Documentation must be kept in the departments
- TRX codes must be established
- Must be paid using FN90 grant

Transaction (TRX) Codes

- A TRX code ties a scholarship award to an account number (grant, program or gift)
- **AS498** form must be completed
- Used in the SAE system to disburse funds to a student
- Used in the ABS to load tuition exemptions. ABS is the student Award Billing System in mainframe.

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AS498 Form

Completing AS498 Form

- Indicate whether the award is one of the following:
  Note: use the fellowship lines for stipend payments to participants

Please check all that apply:	Spend Category	TRX Code LSU Students	TRX Code* Non-LSU Students
☐ Graduate Fellowship (SAE)	SC0111	☐	☐
☐ Undergraduate Fellowship (SAE)	SC0114	☐	☐
☐ Scholarship – Cash Award (SAE)	SC0112	☐	☐
☐ Scholarship – Tuition/Fee Exemption (ABS)	SC0112	☐	☐

*For students not required to be enrolled as a condition of award or non-LSU students.

- **Indicate if the award is for LSU students or non-LSU students**. If the recipient is not required to be enrolled for the semester in which they receive the award, then non-LSU student should be indicated.

Completing AS498 Form

- Include as much information as possible on how the recipient will be selected. The information supplied will appear on the SAE document when created for the award. The department is responsible for keeping a copy of the scholarship selection criteria on file for auditing purposes.

Criteria**				
Name of Scholarship/Fellowship				
Cost Center Hierarchy			Cost Center	
Student Classification			Major	
GPA (For Original Award)			GPA (To Retain)	
Full-time required?	☐ Yes ☐ No		Amount	
Semesters Awarded	☐ Fall ☐ Spring ☐ Summer ☐ Full Year		Number of Semesters/Years Student can receive Scholarship/Fellowship	
Online Semesters Awarded	☐ First Fall (1L) ☐ First Spring (2D) ☐ First Summer (3D) ☐ Second Fall (1P) ☐ Second Spring (2L) ☐ Second Summer (1D)			
Other Requirements				

** *Documentation of scholarship criteria and other donor restrictions must be attached.*
** *For sponsored agreement accounts, documentation of fellowship criteria must be maintained by the department.*
** *If unrestricted funds are to be used, Board of Supervisors' approval must be attached.*

Note: If the award is for the full year and Full-time required is indicated, then it is assumed that the student must be enrolled in full-time hours during the summer semester. If applicable, be sure to also include a separate page with any additional criteria used for selection and retention.

Routing Process

- Graduate Fellowship
  - Department → Dean→ Graduate School→ SPA→ Financial Aid & Scholarships→ Bursar Operation
- Undergraduate Fellowship
  - Department → Dean→ SPA→ Financial Aid & Scholarships → Bursar Operations
- Scholarship-Cash Award
  - Department → Dean→ SPA→ Financial Aid & Scholarships → Bursar Operations
- Scholarship-Tuition/Fees Exemption
  - Department→ Dean→ SPA→ Bursar Operations → Financial Aid & Scholarships

- Once the TRX Code is established, you will receive an email from Financial Aid and Scholarships with the new TRX Code

Who Loads What?

- Tuition/fee exemptions for sponsored agreements – SPA loads in ABS

- Stipends – Department loads in SAE

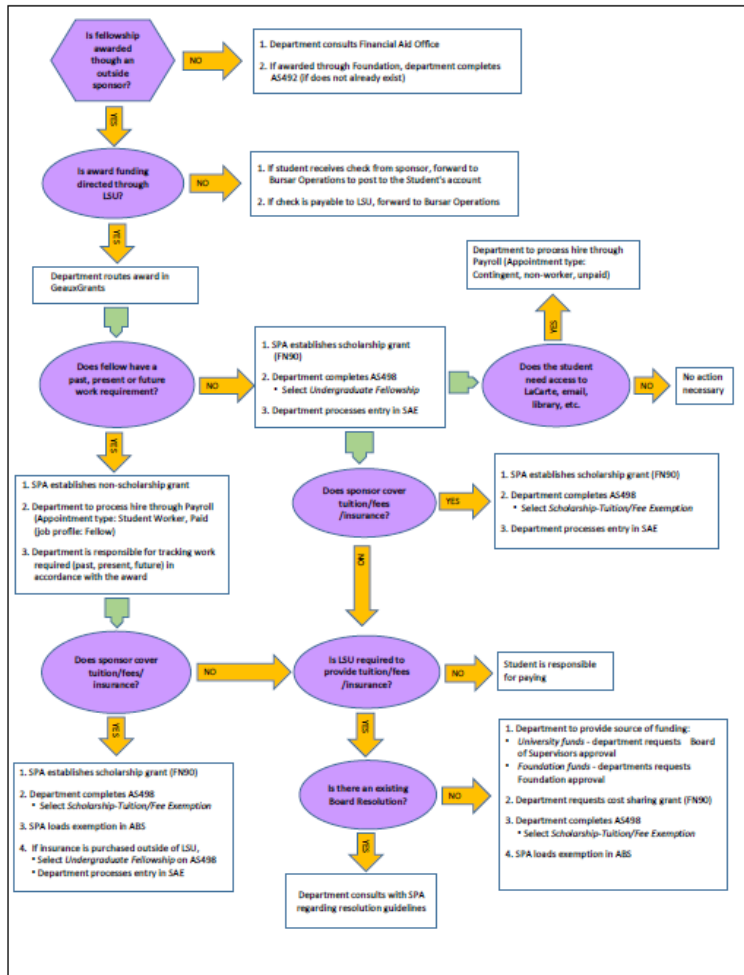- Cash Awards (rare) – Department loads in SAE

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Reports

- Exemption/Cash Award Activity Reports
  - Found in **myLSU→Financial Services→Reporting Tools →Accounts Receivable**
  - For scholarship detail by student/semester
  - Departments must verify that the students listed on the report are:
    - Receiving the correct exemption amount
    - Approved for the award
  - Must be reconciled monthly
- Expense by Award – for account balances
- SPA Journal Lines – for non-scholarship costs detail

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Fellowship Decision Tree – for processing instructions

https://lsu.edu/administration/ofa/oas/spa/fellowship_scholarshipdecisiontree.php