QUICK REFERENCE GUIDE FOR FISCAL OFFICERS/BUSINESS OFFICES RELATED TO TRAINING GRANT PROCESSING

This document is an informational aid for Fiscal Officers and Business Managers who are responsible for managing/processing University of Arizona training grants for graduate student(s) who are working with a faculty member and receiving funding from the grant. The Graduate College has provided this aid to assist with the process of applying, accepting, and processing grants received.

Pre-Submission

1. If a student or PI intends to apply for a fellowship or other predoctoral trainee grant, please follow these steps:

    a. Student/PI mentor should notify college/department business team regarding intent to apply.

    b. Work with the assigned ORP Award specialist for budget development and submission of all required documents for the submission of your application. For college specific tuition and other rates, coordination with the college/department business team is required.

    c. It is the student's responsibility to work with the college/department Business or Proposal Development Team to determine stipend, insurance and tuition costs (based on current tuition and fee rates using the Bursar's Office tuition calculator, https://tuitioncalculator.fso.arizona.edu/#/) *note – if there are any questions about which tuition rate should be used for the application, please contact the Graduate College Office of Fellowships.

2. The student and/or PI must notify their Business or Proposal Administration Team. By notifying the appropriate team, they can help track the application and, if funded, will work with the awarded student/PI and department fiscal officer or designee to ensure the student is transferred to the appropriate funding mechanisms as soon as the award has been set up in the University systems.

    a. For awarded grants such as NIH F30, F31, and T32, this would require the student to resign from their current Graduate Assistant/Associate (GA) position prior to initiating the award and being paid a monthly stipend through the students' Bursar Account. Note: some foundations may have different regulations that would allow students to retain their GA position. Please work with the fiscal officer or designee in your department to determine whether this is the case.

The purpose of this notification is:

i. Business or Proposal Administration Team will ensure maximization of the fellowship/trainee award and ensure the timely processing of employee/student transitions to the appropriate funding source (mechanisms). Business or Proposal Administration Team are knowledgeable in the University processes and can ensure students who move from a GA employed position to extramural funding sources can do so without affecting the student financially. For example, if a student resigns from the GA employed position too early in a semester, it could result in the student or PI having to absorb additional costs for tuition and/or insurance.

ii. The Graduate Student should work with their departmental fiscal officer or designee who can help provide a budget for tuition/salary/other costs (insurance and childcare). We want to maximize the funds the student will receive for those expenses.

iii. Please check the application requirements carefully. There may be some program-related information that needs to be requested in advance.

Post Award

1. Notification of Award: Congratulations! Once you are aware your application has been funded or if you have received a Notice of Award (NOA), please contact your department fiscal officer or designee and Sponsored Program Managers (SPM) to make them aware your proposal has been funded. You will want to forward copies of any documentation associated with your award notification.

   When there are anticipated delays between award account set-up with ORP and the Busar's Office, and when the student needs to start receiving funding, department business team should use a temporary funding account to provide award funding, while they await account set-up. The temporary funding can be corrected/moved to the appropriate award account once set up (this process may take several months).

   If a department needs assistance in figuring out how to temporarily fund a student, please reach out to the Graduate College Business Team, and they can provide assistance.

   a. Work with your department Business or Proposal Administration Team to identify processing timelines for account setup as you cannot start expense against your award until the account setup is completed.

      i. Student/Faculty/fiscal officer/Proposal Administration Team will set a start date for grants; it is preferable to start all grants July 1st and January 1st so that there are no funding issues moving from GA status (employed) to grant funding status (using Bursar disbursement). Failure to follow this timeline may result in students needing to pay for partial tuition or insurance charges (based on termination date).

ii. If this occurs, it is advised that departments/programs assist with tuition or other types of award funding, when possible, to cover any tuition or insurance expense incurred related to the transition in funding types.

iii. Once the account has been set up, the Business Team will need to request the new account be added to the financial aid system (Bursar) for all stipends to be paid, and item types be set up with the Office of Student Financial Aid.

b. Please notify department Business Team that you have received your NOA, so that they can assist with next steps, which may include (but not limited to):

i. GA resignation- This is required for NIH awards but may or may not be required for some foundation awards. Please work with your Business or Proposal Administration Team to learn the requirements for your award.

ii. In the Student Center (UAccess student portal), Bursar account, student awardees should add their direct deposit information. It is important to note that employee Direct Deposit entered into the HR system will not transfer to the Student Center.

iii. In the Student Center (UAccess student portal), make sure that student is registered for annual Student Health Insurance; if student was on GAship prior to receiving fellowship award, that amount should have been paid for the student, and on a grant that amount should also be paid for the student.

iv. If any issues arise with payment of stipends, tuition, health insurance, etc., please notify Business team immediately. If Business Team is unable to assist or needs further help, please reach out to the Graduate College Business Team

v. Students are required to pay the Arizona Financial Aid Trust Fee (as of FY27, $61 each semester at 7+ units). This can be supported by the grant if it is added to the fees budget.

vi. Business and Proposal Administration Teams, as well as the Graduate College, are here to help students, so please reach out if you have questions/concerns.

2. The procedure for processing payments for fellowship tuition, insurance and stipend costs is as follows. As awards are processed (ideally by semester, but sometimes monthly when required) the fiscal officer (for information) and accountant (for approval) will be notified of all transactions.

a. At the beginning of the financial aid year, or semester (if a spring start date), department/college business team will enter external award information for stipend, tuition and insurance that will be entered for the entire academic year.

i. The appendix on page 4 shows an example of how aF30/F31 expenses are to be allocated.

ii. The appending on page 5 shows an example of how T32 expenses are to be allocated.

iii. In the Student Center (UAccess student portal) the student should expect to see aid entered for both semesters. It is important to note that the amounts for each semester for tuition and insurance will not be disbursed to the student account until about a week prior to the beginning of the semester.

b. Stipend/Tuition awards should be entered as follows:

i. For payments entered monthly on the 25th of each month (or nearest workday), the department or Business Team will enter the monthly salary stipend into the UAccess Student Administrator portal, used for entering student awards.

ii. On May 25th of each year (or nearest workday), the department or Business Team will enter the salary stipend for two months, June and July; this payment cycle is done so that the students' summer stipends are not held up at fiscal year-end.

iii. For payments entered twice a year (Fall and Spring semester) as well as summer:

1. Fall and Spring stipend, tuition and insurance awards should be entered two months prior to the start of the Spring semester (where possible) and no later than 7 weeks prior to the start of classes.

2. Students must be aware that if they are registered for spring courses and spring health insurance in December the financial aid and bursar departments may hold this stipend until the beginning of the semester.

3. Summer portion of award should be entered by the May 25th deadline referenced above

iv. For award stipends that are entered monthly, if a student does not receive their salary stipend by the 5th of the month, please contact your department/college Business Team so that they can assist the student with tracking what happened the disbursement.

1. The Business Team can review the external award for any issues that can be detected or reach out to UA Financial Aid/Bursar for assistance.

2. The Universities financial system automatically applies revenue towards any balance due on the students account, in which case contacting the Bursar's office may be required to apply revenue towards the stipend. *Please note that any balances due on your student account must be paid in a timely manner.

3. F30/F31 post-award grant management is the responsibility of the departmental fiscal officer and the assigned Sponsored Projects Manger (SPM) throughout the award period as the account is set up under the mentors' org code (i.e. 60AT)

   a. For F30 awards post-award management is for no more than 6 years

   b. For F31 awards post-award management is for no more than 3 years.

4. Management of awardee's (students) position distribution (PD) is managed by the departmental fiscal officer or designee on the mentor's (PI's) PD worksheet during the term of the award.

   a. For MD/PhD students returning to medical training that have received an F30 the department's fiscal officer or designee will continue to be responsible for the student's PD sheet as their grant is tied to the PI Org code.

   b. All other MD/PhD students' PD sheets will be managed by the GSO fiscal officer or designee.

For questions/concerns or assistance, please contact the Graduate College Business Team.

Additional Resources:

Sponsored Projects: Proposal Preparation & Submission Information

Sponsored Projects: Award Initiation & Setup Information

Appendix:

Example of Award Tracking Sheet

Account Source	TBD Account F31	2230789 Account -TCRC Department	TBD Account F31 TUITION/FEES	TBD Account F31 Insurance	Total	Transaction ID	Date Processed	Approved
December Stipend	$2,352.00	$398.00			$2,750.00	140663	12/13/2024	Note:
January Stipend	$2,352.00	$398.00			$2,750.00			
Spring Tuition					$0.00			
Spring Fees					$0.00			
Spring Insurance					$0.00			
February Stipend	$2,352.00	$398.00			$2,750.00			
March Stipend	$2,352.00	$398.00			$2,750.00			
April Stipend	$2,352.00	$398.00			$2,750.00			
May Stipend	$2,352.00	$398.00			$2,750.00			
June Stipend	$2,352.00	$398.00						
July Stipend	$2,352.00	$398.00						
August Stipend	$2,352.00	$398.00						
September Stipend	$2,352.00	$398.00						
Spring Tuition								
Spring Fees								
Spring Insurance								
October Stipend	$2,352.00	$398.00						
November Stipend	$2,352.00	$398.00			$2,750.00			
Total Actuals	**$28,224.00**	**$4,776.00**	**$0.00**	**$0.00**	**$19,250.00**			
Budget	$28,224.00	$4,776.00	$7,617.00	$4,750.00				
Variance	$0.00	$0.00	$7,617.00	$4,750.00				

*Difference of 28224 and 32000

Institutional Allowance	$4,750.00	Insurance
Child Care Costs	$0.00	
Other	$7,617.00	Tuition/Fees
Stipend	$33,000.00	
	$45,367.00	