

Instructions for Undergraduate Student Resources Reporting

The Undergraduate Student Resources Reporting (UGRR) form is used to request payment of a scholarship or any resource other than wages to a current undergraduate student.

Federal and State regulations and University Policies 4425 and 4440 require that any type of financial assistance (e.g., grants, scholarships, fellowships, stipends, fee awards, loans, etc.), especially awards, prizes, and scholarships funded from University controlled resources (i.e., funds appearing in the general ledger), be reported to the Office of Financial Aid and Scholarships for all UCSB students whether or not they receive financial aid. This information is used for the University's Corporate Student Systems Report for UCOP.

Form Number and Submission Process

Submit forms via e-mail to: FinaidResource@sa.ucsb.edu *Paper forms are no longer accepted.* Subject line should be the form number. The Naming convention to create form number is as follows:

Official UCSB Department code/fiscal month/submission #

- Example: Financial Aid submission in the month of August for the third submission of the month the form number would be FINA/2/3.

Account and Ledger Information

Payments must be charged to a Student Aid Account (78XXXX). The account and fund must be set up and linked in PeopleSOFT. An object code is required:

ACCEPTABLE OBJECT CODE	VALID SUB CODE	INVALID SUB CODE
7216	5 or 7	0,1,2 and 3
7770	5, 7 or 3	0, 1 and 2

Restricted Awards

Only use restricted awards when required by your funding source. Restricted awards can't be used to pay balances on BARC, while unrestricted awards may be used to pay any BARC balance the student owes. Students generally prefer unrestricted awards that pay their bill automatically instead of receiving a check and still needing to pay an outstanding balance.

Quarter Total

The Quarter Total is the cumulative quarter total from the same resource. We use this to ensure that awards paid over multiple disbursements are disbursed correctly, and to identify potential duplicate requests.

- Example – You first award \$200 for fall quarter – the quarter total is \$200. A month later you report \$100 for the same student, same award, same quarter – the quarter total is \$300.

Authorization Signatures

Authorization signatures are required. UGRR forms with missing authorizations cannot be processed. Your signature authorizes the payment and certifies that you have verified student registration status, academic standing and information listed on the form.

Processing Time

Payments typically take 7-10 business days, but may take longer for new awards being set up for the first time and during high volume periods, i.e. summer, leading up to fiscal close. Due to high demand in peak periods we recommend reporting by the following dates to ensure timely processing.

- For fiscal close processing – Submit UGRR by May 1st

Disbursements

OFAS pays awards daily beginning 10 days before the first day of classes. BARC sends refunds to students twice per week. Students not meeting academic standards by OFAS or their college can't receive disbursements. Contact OFAS if you are unsure if a student is currently eligible to receive the payment.

Undergraduate Research and Creative Activities Grant (URCA) & Transfer Student Research Award (TSRA)

We understand that these grants are meant to pay expenses outside of the normal Cost of Attendance. In order to ensure student aid is not impacted, please check the URCA/TSRA indicator box on the form. Retain all backup documentation as the department of record. Do not submit copies with this form.

Graduate Student Resources

This process is for undergraduate students. Contact Graduate Division for payments to graduate students.