GFS Users Forum

November 18, 2010

Understanding & Mastering GFS Payroll
GFS to Payroll Interface

- GFS is the system of record for all graduate student and postdoc assistantship/salary
- Fully approved GFS assistantship/salary lines interface to Payroll twice monthly on the:
  - 15th at ~11:30pm
  - Last day of the month ~11:30pm
- Records not fully approved at the time of the interface will not pay with the on-cycle payroll

The GFS to Payroll interface creates an HR job record in the Employee Record series of 70 – 75
GFS to Payroll Interface

The creation of an HR job record for a student/postdoc enables the:
- Employee Information tab in Axess
  - Employee self-service for viewing pay statements, direct deposit enrollment & withholding allowance declarations
- GFS Off-Cycle Check Webform
- Supplemental Pay Webform

Required Payroll Forms

When a student/postdoc begins receiving salary, the following are required:
- Collect an I-9 Form within 3 business days from the start of the appointment
- Remind the student/postdoc to visit Axess to enroll in direct deposit and declare withholding allowances
- Refer the student/postdoc to tax treaty forms, if applicable
Prohibited Data & Payroll Forms

Many payroll forms require prohibited data (SSN, financial account information, etc.)
- Avoid collecting this data on your computer
  - Direct the student/postdoc to available resources, but have them complete the forms on their own, preferably in Axess or on paper when required (I-9s and tax treaty forms)
- Do not request prohibited data by email
  - Collect this information, when required, in person or by phone

Late Salary Entries

GFS assistantship/salary lines do not pay retroactively. If a deadline is missed, the department must take one of the following actions:
- Request a will call check for all missing pay
  - Request with the GFS Off-Cycle Check Webform
- Request for missing pay to be added to the next regular paycheck
  - Request with the Supplemental Pay Webform, or
  - Request with a paper One Time Payment Form
If a job record is present – either a current record or one from a prior quarter assistantship – the GFS Off-Cycle Check Webform may be used to request missing pay.

The transaction approvers are selected based upon the entry in the Paying DeptID field:
GFS Off-Cycle Check Webform

- Webforms that are fully approved by 9am are processed the same day (Monday – Friday)
  - Will call checks are available at the Campus Service Counter after 3pm each day
- For additional instructions, review the GFS Off-Cycle Check Webform job aid at:
  http://fingate.stanford.edu/docs/
  job_aid_GFS_off_cycle_check.doc

Adding Missing Pay to the Regular Paycheck

- Supplemental Pay Webform
  - Available to those with PeopleSoft HR Authority
  - If it is the first assistantship line for the student/postdoc, the Webform is not available until GFS interfaces to Payroll
  - There is usually one business day following the interface to complete Supplemental Pay Webform entries
- Paper One Time Payment Form
  http://fingate.stanford.edu/docs/one_time_pay_reduction.xls
Other Considerations for Late Assistantship Entries – Graduate Students

Assistantships entered after the first payroll deadline of a quarter will create issues with:

- **Health Insurance Subsidy**
  - Student does not receive the University subsidy
  - Department must fund the subsidy

- **Payroll Deduction**
  - If the student has enrolled in Payroll deduction to pay student fees, the first scheduled deduction is missed
  - Direct the student to ePay the missing deduction to avoid confusion at the end of the quarter

If the Employee Info Tab is Not Available . . .

Student may view payroll pay statements and enroll in direct deposit in the Axess Student Center
Questions?

Academic Travel & Miscellaneous Student Support Payments
Academic Travel & Miscellaneous Student Support Payments

In addition to regular support or salary payments, funds are often made available to assist our students and postdocs with:

- Conference and/or research travel
- Computers and related expenses
- Books
- Office supplies, copy fees, etc.

Academic Travel & Miscellaneous Student Support Payments

It is important to filter expenses through the appropriate channel to ensure that:

- The student/postdoc receives payment promptly
- Administrative hours involved in handling the payment are minimized
- Expenses are categorized correctly for the sponsor, if applicable
- Tax reportable items are included on a single tax document for the student/postdoc
Academic Travel Expenses

Travel expenses associated with degree-related educational activity, including attendance at program-related conferences (whether speaking/presenting or participating as an attendee), visits to field sites or labs, research collaborations, etc. are generally reimbursable as "university business."

Reimburse academic travel expenses via Oracle iOU
- Review guidelines in advance of the travel
- Student travel expense reimbursements require certification from the faculty advisor
- Academic travel expense reimbursements are normally not taxable income to the student/postdoc
- A travel advance or a department travel card may be used for expenses incurred in advance of the travel
Miscellaneous Student Support Expenses

Payments to help a graduate student or postdoc pay education-related expenses, other than academic travel expenses, will normally be considered to be student support, and not a University business expense.

Miscellaneous Student Support Expenses

Reimburse miscellaneous student support expenses via GFS

- Payments may be issued in advance, or after the expense has been incurred, according to department/sponsor guidelines
- As student support, these payments are tax-reportable
  - The student/postdoc may be able to deduct education-related expenses on their tax return (and should save their receipts for this purpose)

Note: If a student is being reimbursed for materials purchased for the University (where the materials will belong to Stanford, and not to the student), the expense should be reimbursed as University business through Oracle iOU. Departments are encouraged to find other means for facilitating these purchases, rather than having the student pay out-of-pocket for a University expense.
Requesting Miscellaneous Student Support Expenses in GFS

Two new expenditure types are available in GFS for use in paying miscellaneous student support payments.

- 57520 - Graduate Student Supply/Travel Stipend
- 57841 - Postdoc/Non-Matric Supply/Travel Stipend

Use the new expenditure types if your department needs to report travel grants and/or supply stipends separately from other support payments. Otherwise, you may continue to disburse additional support awards using the existing stipend expenditure types.

Payment of Miscellaneous Student Support Expenses in GFS - Graduate Students

Graduate fellowship stipends are paid three times weekly by Student Financial Services.

- Entries made with the new expenditure type will be refunded on the normal payment schedule.
- Payments are distributed by direct deposit if the student is enrolled.
Payment of Miscellaneous Student Support Expenses in GFS - Postdocs

Postdoc fellowship stipends are paid once monthly, on the last day of each month.

- Stipend should be entered with the start and end dates of the current month to be included in the normal payment schedule.
- Payments are distributed by direct deposit if the postdoc is enrolled.
- If payment is required earlier than the next regular pay cycle, please submit a HelpSU ticket to Payroll to request a will call check
  - Will call checks are processed each Friday and are made available at the Campus Service Window at Tresidder after 3pm.

Student Awards & Prizes

Student awards and prizes, usually awarded at the end of the academic year, may be entered in GFS as a stipend.

- If the award/prize must be a surprise, then the SU-21 Form may be used to request the payment.
- It is recommended that the student be issued a certificate or notice of the award/prize, and then the payment requested in GFS.
Questions?

GFS Graduate Student Assistantships: Alternate Quarter Schedule
GFS Assistantships

GFS assistantships are designed as a way of delivering support to our graduates students who are working on research or teaching.

- Assistantship pay provides a form of continuous support to a student throughout an academic quarter
- The work effort is provided throughout the quarter, but actual work hours may vary from week to week
  - Tracking of work hours is not required for assistantships

GFS Standard Assistantship Schedule

GFS Assistantships for graduate students start and stop on prespecified dates:

- Oct 1 – Dec 31 Autumn Quarter
- Jan 1 – Mar 31 Winter Quarter
- Apr 1 – Jun 30 Spring Quarter
- Jul 1 – Sep 30 Summer Quarter

88% of graduate assistantships are paid on the standard schedule.
GFS Standard Assistantship Schedule

Payroll tax and deduction processes are tied to the GFS standard assistantship schedule:

- **FICA and California VDI Exemption Process**
  - Grants tax exemptions, as appropriate, based upon the student’s registration status for the current quarter, as defined by the GFS standard schedule

- **Payroll Deduction Process**
  - Students, particularly those with on-campus housing, register for payroll deduction to spread the cost of their student housing and other fees over the six paychecks of the quarter
  - The payroll deduction schedule is tied to the GFS standard schedule

GFS Alternate Assistantship Schedule

As appropriate, departments may specify the alternate assistantship schedule, which starts and stops one pay period earlier than the standard schedule:

- **Sep 16 – Dec 15**  Autumn Quarter
- **Dec 16 – Mar 15**  Winter Quarter
- **Mar 16 – Jun 15**  Spring Quarter
- **Jun 16 – Sep 15**  Summer Quarter

12% of graduate assistantships are paid on the alternate schedule.
GFS Alternate Assistantship Schedule

The alternate schedule is appropriate in the following circumstances:

- The student did not receive pay for the full summer quarter on the standard schedule.
- The student will start work during the 9/16 – 9/30 pay period, and it is an individual financial hardship to receive pay on the standard schedule.

Considerations: Alternate Schedule

- FICA and VDI tax exemptions are not granted to alternate schedule students for the 9/16 – 9/30 paycheck
  - Approximately 8% additional withholding for the student and the University
- The 9/16 – 9/30 paycheck will not contain the student payroll deduction
  - Student is required to ePay the missing deduction at the end of the final quarter of work
- The first check for Winter Quarter is issued prior to the start of Winter Quarter
  - Difficult for departments to determine student withdrawals and teaching assistantship load shifts before the start of the quarter – students may be overpaid
Considerations: Alternate Schedule

We recommend that you consider alternate schedule only on a case-by-case basis and not apply it across an entire department. Please consider the following alternatives:

- As funding allows, grant students start-up fellowship funds for start-of-quarter expenses
- Student Financial Services offers emergency advances for students
  - Students may apply individually for funding
  - Information forthcoming on funding requests from departments for groups of students

Questions?