




VISITING SCHOLAR & POSTDOC AFFAIRS

UNIVERSITY OF CALIFORNIA, BERKELEY

The background of the slide is a dark blue color with a faint, repeating pattern of US dollar bills, including \$100 and \$500 bills, scattered across the surface.

Visiting Scholar/Student Researcher Stipend Disbursement Overview

Visiting Scholar/Student Researcher Stipend Disbursement Overview

Units may provide a stipend of up to \$20,000 per one appointment year which can be used to cover living expenses, travel costs, and incidental research expenses, but **not as a form of salary compensation.**

Stipends can only be provided to **visiting scholars** and **visiting student researchers** who are in residence at UC Berkeley.

Previously, stipends have been requested using a paper form. These stipends will now be requested **online** through the VSPA Gateway.

Visiting Scholar/Student Researcher Stipend Disbursement Limits

Stipend disbursements to visiting scholars have a limit of \$20,000 per one appointment year.

PIs/faculty sponsors who wish to pay a VS/VSR over the \$20,000 limit must submit a letter requesting an exception with a justification.

The letter needs to be addressed to Yvette Lane-Newton and uploaded to the VSPA Gateway.

New User Role in VSPA Gateway



The **Disbursement Preparer (DP)** is the person authorized by the department to submit stipend requests

The **DP** must receive authorization from the appropriate financial head of the department to process payments

To obtain access as a **DP** in the **VSPA Gateway**, your **CSS Team Lead** must email vspa@berkeley.edu with your name and assigned departments

Visiting Scholar/Student Researcher Stipend Disbursement Process At-A-Glance

- ✓ Visiting scholar/student researcher must have an approved appointment in the VSPA Gateway
- ✓ Disbursement Preparer submits a stipend request for the scholar in the VSPA Gateway
- ✓ International visiting scholars/student researchers must have a GLACIER record
- ✓ Disbursement Preparer enters the scholar's vendor number
- ✓ VSPA checks that the stipend is within the 20K limit and the University Services Fee has been paid
- ✓ VSPA approves the stipend request in Gateway
- ✓ Stipend request is sent to Payroll Office when the payment date is within 2 weeks
- ✓ Payroll Office processes stipend request and notifies Campus Shared Services to approve the payment in BFS

Visiting Scholar/Student Researcher Stipend Disbursement Payment Options

Stipend requests will be paid out to the scholar via check by U.S. mail unless otherwise stated.

- **Check by U.S. Mail**

The check will be mailed to the scholar at his/her local address as listed in the scholar's vendor record.

- **Check to be Held for Pickup**


You can indicate to hold the check for pick up on campus in the **Disbursement Preparer Comments** section of the online request form in Gateway.

- **EFT (Electronic Funds Transfer) in the U.S.**

To set up EFT, go to:

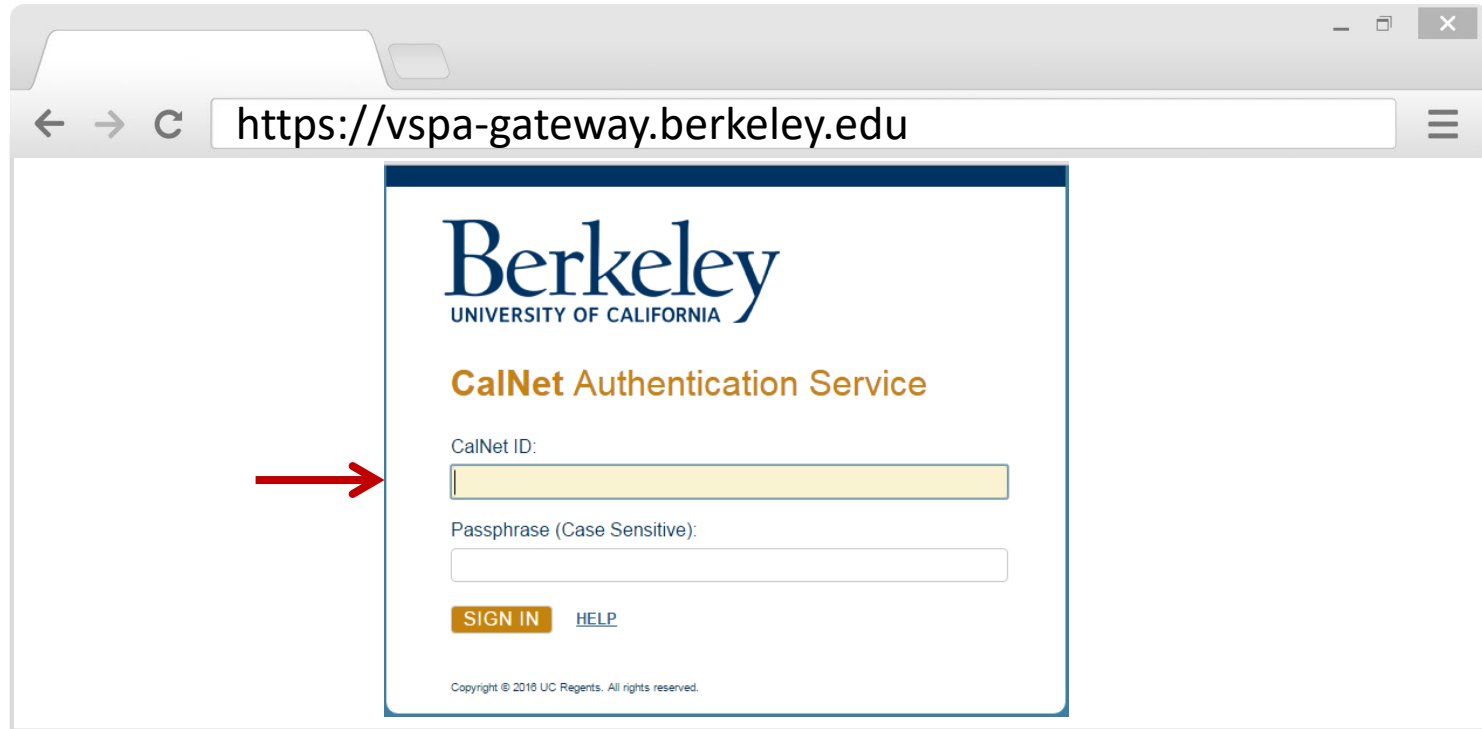
<http://controller.berkeley.edu/electronic-funds-transfer-eft-authorization-instructions#vendors>

International wire transfers are not permitted because stipends are only provided to scholars who are in residence at UC Berkeley.

The background of the slide is a dark blue gradient with a faint, semi-transparent pattern of scattered US dollar bills, including \$100 and \$500 denominations.

Visiting Scholar/Student Researcher Stipend Disbursement Process

Visiting Scholar/Student Researcher Stipend Disbursement Process



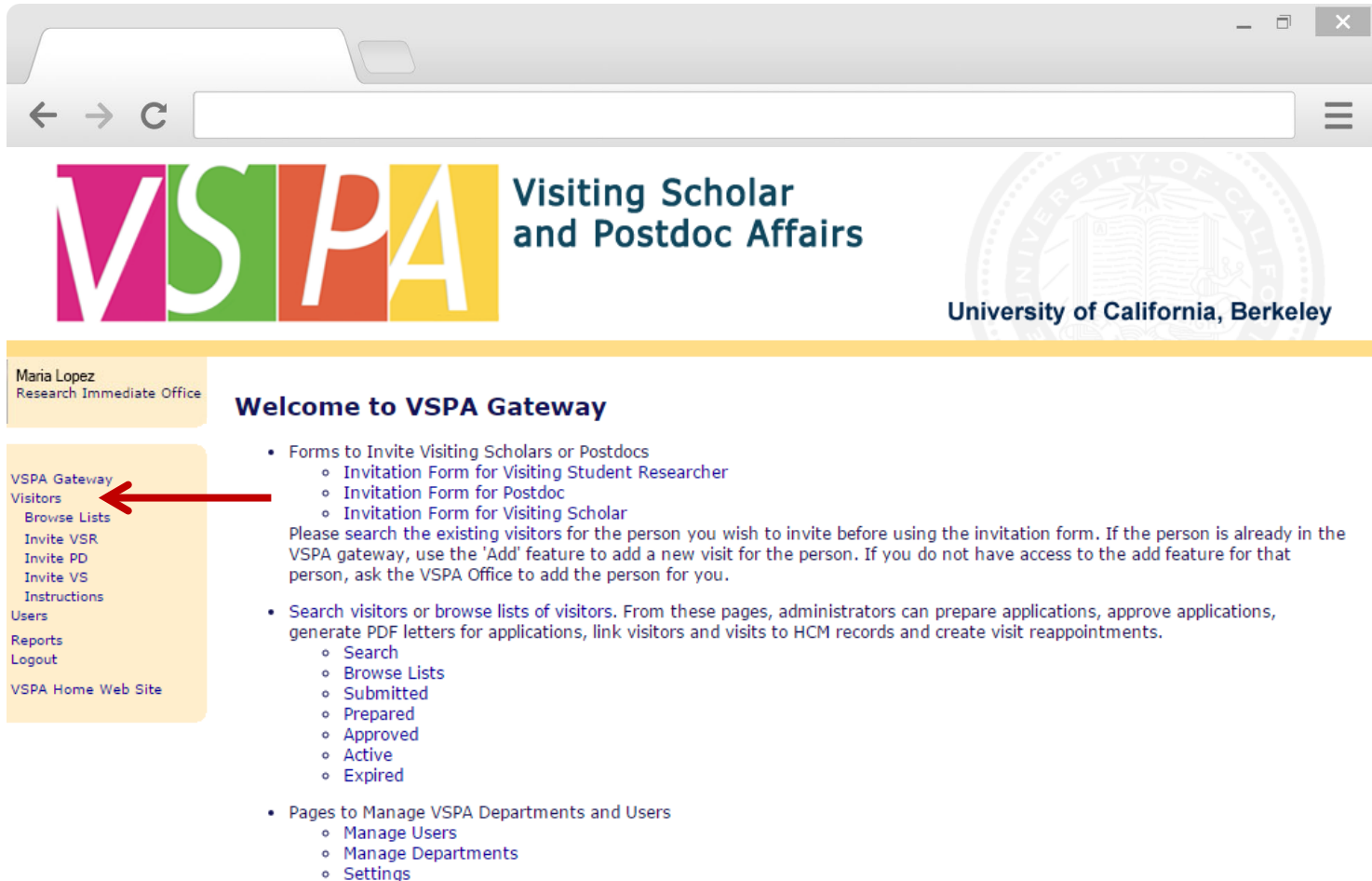
The screenshot shows a web browser window with the address bar displaying <https://vspa-gateway.berkeley.edu>. The main content area features the Berkeley University of California logo at the top, followed by the heading "CalNet Authentication Service". Below this, there are two input fields: "CalNet ID:" and "Passphrase (Case Sensitive):". A red arrow points to the "CalNet ID:" input field. At the bottom of the form, there are two buttons: "SIGN IN" and "HELP". A small copyright notice at the very bottom reads "Copyright © 2016 UC Regents. All rights reserved."

To access the stipend request feature:

Go to the VSPA Gateway: <https://vspa-gateway.berkeley.edu>

Log in with your CalNet ID

Visiting Scholar/Student Researcher Stipend Disbursement Process



The screenshot shows a web browser window displaying the VSPA Gateway website. The header features the VSPA logo (V in pink, S in green, P in orange, A in yellow) and the text "Visiting Scholar and Postdoc Affairs" and "University of California, Berkeley". A navigation sidebar on the left lists: "VSPA Gateway", "Visitors", "Browse Lists", "Invite VSR", "Invite PD", "Invite VS", "Instructions", "Users", "Reports", "Logout", and "VSPA Home Web Site". A red arrow points to the "Visitors" link. The main content area is titled "Welcome to VSPA Gateway" and contains a list of links and instructions.

Maria Lopez
Research Immediate Office

Welcome to VSPA Gateway

- Forms to Invite Visiting Scholars or Postdocs
 - Invitation Form for Visiting Student Researcher
 - Invitation Form for Postdoc
 - Invitation Form for Visiting Scholar

Please search the existing visitors for the person you wish to invite before using the invitation form. If the person is already in the VSPA gateway, use the 'Add' feature to add a new visit for the person. If you do not have access to the add feature for that person, ask the VSPA Office to add the person for you.

- Search visitors or browse lists of visitors. From these pages, administrators can prepare applications, approve applications, generate PDF letters for applications, link visitors and visits to HCM records and create visit reappointments.
 - Search
 - Browse Lists
 - Submitted
 - Prepared
 - Approved
 - Active
 - Expired
- Pages to Manage VSPA Departments and Users
 - Manage Users
 - Manage Departments
 - Settings

Click on **Visitors** to look up scholar

Visiting Scholar/Student Researcher Stipend Disbursement Process

The screenshot shows a web browser window displaying the VSPA (Visiting Scholar and Postdoc Affairs) website. The page header includes the VSPA logo and the text "Visiting Scholar and Postdoc Affairs" and "University of California, Berkeley". The user is logged in as Maria Lopez, Research Immediate Office. The main content area is titled "Search for Visitors" and contains a "Search Conditions" form with the following fields: Family Name (bear), First Name (oski), HCM ID (empty), Visitor Type (Any), Status (Any), and Campus Sponsoring Unit (Any). A "Search" button is located below the form. Below the search form is a "Search Results" section containing a table with the following data:

Name	Visit Dates	Prepare	Approve	HCM	Letters	Appointment +/-	Stipend
Bear, Oski	Jan. 01, 2016 to Aug. 31, 2016			HCM	VS/VSR1	Add	Add
	Sep. 01, 2016 to Dec. 31, 2016			HCM	VS/VSR1 VS/VSR2	Add	Add

A red arrow points to the first row of the search results table.

Searching the visitor will bring up their record

Visiting Scholar/Student Researcher Stipend Disbursement Process

The screenshot shows a web browser window displaying the VSPA (Visiting Scholar and Postdoc Affairs) website. The header includes the VSPA logo and the text "Visiting Scholar and Postdoc Affairs" and "University of California, Berkeley". A user profile for Maria Lopez, Research Immediate Office, is visible. The main content area is titled "Search for Visitors" and contains a "Search Conditions" form with fields for Family Name (bear), First Name (oski), HCM ID, Visitor Type (Any), Status (Any), and Campus Sponsoring Unit (Any). A "Search" button is present. Below the search form is a "Search Results" table. The table has columns for Name, Visit Dates, Prepare, Approve, HCM, Letters, Appointment, +/-, and Stipend. Two rows of results are shown for "Bear, Oski" with visit dates from Jan. 01, 2016 to Aug. 31, 2016 and from Sep. 01, 2016 to Dec. 31, 2016. The "Stipend" column for both rows contains an "Add" button, which is circled in red. A red circle also highlights the "Visit Dates" column header. A red circle highlights the "Stipend" column header and the "Add" button in the second row.

Stipends are requested by appointment period

Name	Visit Dates	Prepare	Approve	HCM	Letters	Appointment	+/-	Stipend
Bear, Oski	Jan. 01, 2016 to Aug. 31, 2016			HCM	VS/VSR1	Add	100%	Add
Bear, Oski	Sep. 01, 2016 to Dec. 31, 2016			HCM	VS/VSR1 VS/VSR2	Add	100%	Add

Click on **Add** under the **Stipend** column

Visiting Scholar/Student Researcher Stipend Disbursement Process

The screenshot shows a web browser window displaying the VSPA (Visiting Scholar and Postdoc Affairs) portal for the University of California, Berkeley. The page title is "Stipend Request for Oski Bear". The user is logged in as Maria Lopez, Research Immediate Office. The form is divided into two main sections: "Preparer" and "Stipend".

Preparer Section: A checkbox is checked, indicating that the preparer has confirmed authorization from the appropriate financial head of the department to submit the application. A red arrow points to this checkbox.

Stipend Section: The visitor name is "Oski Bear" and the request status is "Propose". The "Disbursement Preparer Comments" field is empty, with a red arrow pointing to it. Below this field, there is a note: "Include instructions for payment delivery here, e.g. Hold for Pickup, EFT has been set up. If payment is for a visit that has ended, include the payment date(s) here."

Select the checkbox that indicates the **Disbursement Preparer** is authorized to submit the stipend disbursement request

In the **Disbursement Preparer Comments** section, list any additional instructions for the payment

Visiting Scholar/Student Researcher Stipend Disbursement Process

VSPA Visiting Scholar and Postdoc Affairs
University of California, Berkeley

Maria Lopez
Research Immediate Office

VSPA Gateway
Visitors
Users
Reports
Logout
VSPA Home Web Site

Stipend Request for Oski Bear

Preparer

I, as the preparer of the proposed stipend request, have confirmed authorization from the appropriate financial head of the department to submit this application.

Stipend

Visitor Name: Oski Bear
Request Status: Propose
Disbursement Preparer
Comments:

Include instructions for payment delivery here, e.g. Hold for Pickup, EFT has been set up. If payment is for a visit that has ended, include the payment date(s) here.

HCM ID: 71831
Vendor Number:

US Citizen: Yes No

Visa Type: J-1 Exchange Visitor (Scholar)

This field is populated from the visitor record in the Gateway. Please contact VSPA if this information is incorrect.

* Payment Frequency:
* Purpose of Payment:
* Total Award:
If the stipend request is more than upload an exception letter after you submit this request.

Visa Type and **Citizenship** data is automatically pulled from the visitor's Gateway record

Visiting Scholar/Student Researcher Stipend Disbursement Process

VSPA Visiting Scholar and Postdoc Affairs
University of California, Berkeley

Maria Lopez
Research Immediate Office

Stipend Request for Oski Bear

Preparer

I, as the preparer of the proposed stipend request, have confirmed authorization from the appropriate financial head of the department to submit this application.

Stipend

Visitor Name: Oski Bear
Request Status: Propose
Disbursement Preparer
Comments:

Include instructions for payment delivery here, e.g. Hold for Pickup, EFT has been set up. If payment is for a visit that has ended, include the payment date(s) here.

HCM ID: 71831
Vendor Number:
US Citizen: Yes No
Visa Type: J-1 Exchange Visitor (Scholar)

This field is populated from the visitor record in the Gateway. Please contact VSPA if this information is incorrect.


* Payment Frequency:
* Purpose of Payment:
* Total Award:

If the stipend request is more than upload an exception letter after you submit this request.

Payment Frequency Options:
Single Payment
Monthly Payment
Other

Select Payment Frequency (Single, Monthly, or Other)

Visiting Scholar/Student Researcher Stipend Disbursement Process

* Payment Frequency: Other 

Use payment line items below to specify payment schedule

* Purpose of Payment: Living Expenses

* Total Award: \$ 5000

If the stipend request is more than \$10,000, you can upload an exception letter after you submit this request.

PAYMENT SCHEDULE

Amount	# of Payments	Amount of Each Payment	Date to Start Payment	BU	Account	Fund	Org	Program	CF1	CF2
3000	1	3000	July 21 2016	1	55030	68395	26474	72		
2000	1	2000	November 21 2016	1	55030	68395	26474	72		
			July 21 2016							
			July 21 2016							

If payment frequency is **Other**, use the line items in **Payment Schedule** to specify **Date to Start Payment** and **Amount of Each Payment**

Visiting Scholar/Student Researcher Stipend Disbursement Process

VSPA Visiting Scholar and Postdoc Affairs
University of California, Berkeley

Maria Lopez
Research Immediate Office

VSPA Gateway
Visitors
Users
Reports
Logout
VSPA Home Web Site

Stipend Request for Oski Bear

Preparer

I, as the preparer of the proposed stipend request, have confirmed authorization from the appropriate financial head of the department to submit this application.

Stipend

Visitor Name: Oski Bear
Request Status: Propose
Disbursement Preparer
Comments:

Include instructions for payment delivery here, e.g. Hold for Pickup, EFT has been set up. If payment is for a visit that has ended, include the payment date(s) here.

HCM ID: 71831
Vendor Number:
US Citizen: Yes No
Visa Type: J-1 Exchange Visitor (Scholar)

This field is populated from the visitor record in the Gateway. Please contact VSPA if this information is incorrect.

* Payment Frequency:

Use payment line items below to specify payment schedule

* Purpose of Payment:
* Total Award:

If the stipend request is more than \$10,000, please include a description letter after you submit this request.

PAYMENT SCHEDULE

Select Purpose of Payment

Visiting Scholar/Student Researcher Stipend Disbursement Process

Preparer

I, as the preparer of the proposed stipend request, have confirmed authorization from the appropriate financial head of the department to submit this application.

Stipend

Visitor Name: Oski Bear
Request Status: Propose
Disbursement Preparer Comments:

Include instructions for payment delivery here, e.g. Hold for Pickup, EFT has been set up. If payment is for a visit that has ended, include the payment date(s) here.

HCM ID: 71831
Vendor Number:
US Citizen: Yes No
Visa Type: J-1 Exchange Visitor (Scholar)

This field is populated from the visitor record in the Gateway. Please contact VSPA if this information is incorrect.

* **Payment Frequency:** Other

Use payment line items below to specify payment schedule

* **Purpose of Payment:** Other

Describe Purpose of Payment:

Selecting **Other** will require you to **Describe Purpose of Payment**

Visiting Scholar/Student Researcher Stipend Disbursement Process

* Payment Frequency: Monthly Payment ▾

* Purpose of Payment: Living Expenses ▾

* Total Award: \$ 5000

If the stipend request is more than \$10,000, you can upload an exception letter after you submit this request.

PAYMENT SCHEDULE

Amount	# of Payments	Amount of Each Payment	Date to Start Payment	BU	Account	Fund	Org	Program	CF1	CF2
5000	2	2500	July 21 2016	1	55030	68395	26474	72		
			July 21 2016							
			July 21 2016							
			July 21 2016							

Enter Total Award

If payment frequency is **Monthly**, the **Amount of Each Payment** will be the **same amount on the same day every month** as the day listed in **Date to Start Payment**

Visiting Scholar/Student Researcher Stipend Disbursement Process

← → C [Address Bar]

* **Payment Frequency:** Monthly Payment ▾
 * **Purpose of Payment:** Living Expenses ▾
 * **Total Award:** \$ 5000

If the stipend request is more than \$10,000, you can upload an exception letter after you submit this request.

PAYMENT SCHEDULE

Amount	# of Payments	Amount of Each Payment	Date to Start Payment	BU	Account	Fund	Org	Program	CF1	CF2
2500	1	2500	August 8 2016 ▾	1	55030	68395	26474	72		OAVSP
2500	1	2500	September 8 2016 ▾	1	55030	68395	26474	72		OAWOR
			August 8 2016 ▾							
			August 8 2016 ▾							

Enter **chartstring** information

VSPA Gateway automatically validates the chartstring

If the payment is going to be made from more than one chartstring, list each chartstring separately on individual line items

Visiting Scholar/Student Researcher Stipend Disbursement Process

* Payment Frequency: Other

Use payment line items below to specify payment schedule

* Purpose of Payment: Living Expenses

* Total Award: \$ 5000

If the stipend request is more than \$10,000, you can upload an exception letter after you submit this request.

PAYMENT SCHEDULE

Amount	# of Payments	Amount of Each Payment	Date to Start Payment	BU	Account	Fund	Org	Program	CF1	CF2
3000	1	3000	August 9 2016	1	55030	68395	26474	72		
2000	1	2000	November 9 2016	1	55030	68395	26474	72		
			August 9 2016							
			August 9 2016							

If the payment dates are **not** on a monthly schedule or if the payment amounts are **not** equal, use individual line items to specify

Total Award must equal the total sum of **Amount** in all line items

Visiting Scholar/Student Researcher Stipend Disbursement Process

Stipend Request for Oski Bear

Preparer

I, as the preparer of the proposed stipend request, have confirmed authorization from the appropriate financial head of the department to submit this application.

Stipend

Visitor Name: Oski Bear
Request Status: In-Progress
Creation Date: Jul. 22, 2016 15:45
Disbursement Preparer
Comments:

HCM ID:
Vendor Number:
US Citizen: Yes No
Visa Type: J-1 Exchange Visitor (Scholar)

* Payment Frequency: Monthly Payment
* Purpose of Payment: Living Expenses
* Total Award: \$ 1000.0

PAYMENT SCHEDULE

Amount	# of Payments	Amount of Each Payment	Date to Start Payment	BU	Account	Fund	Org	Program	CF1	CF2
<input type="text" value="1000"/>	<input type="text" value="1"/>	<input type="text" value="1000"/>	Jul. 22, 2016	<input type="text" value="1"/>	<input type="text" value="55030"/>	<input type="text" value="68395"/>	<input type="text" value="26474"/>	<input type="text" value="72"/>	<input type="text"/>	<input type="text"/>

Department Submitter: Maria Lopez (captured when form submitted)

* Campus Sponsoring Unit: Visiting Scholar and Postdoc Affairs Program
Stipend Exception Letter (if No file chosen needed):

[Click here to get the Appointment Letter](#)

You will NOT be able to make any changes to the **Payment Frequency**, **Purpose**, or **Payment Schedule** after it has been submitted in the VSPA Gateway

To change those fields, submit a request to vspa@berkeley.edu

Visiting Scholar/Student Researcher Stipend Disbursement Process



← → C [Address Bar]

* Payment Frequency: Monthly Payment ▼

* Purpose of Payment: Living Expenses ▼

* Total Award: \$ 5000

If the stipend request is more than \$10,000, you can upload an exception letter after you submit this request.

PAYMENT SCHEDULE

Amount	# of Payments	Amount of Each Payment	Date to Start Payment	BU	Account	Fund	Org	Program	CF1	CF2
5000	2	2500	July 21 2016 ▼	1	55030	68395	26474	72		
			July 21 2016 ▼							
			July 21 2016 ▼							
			July 21 2016 ▼							



* Campus Sponsoring Unit: Chemistry Department ▼

Submit



Select **Campus Sponsoring Unit**

Press **Submit**

Visiting Scholar/Student Researcher Stipend Disbursement Process

Maria Lopez
Research Immediate Office

Show All Information for Visit of Oski Bear

Your stipend request has been submitted to VSPA for review. ←

[Click here to get visiting scholar letter.](#)

Control Data

Visitor Type: Visiting Scholar

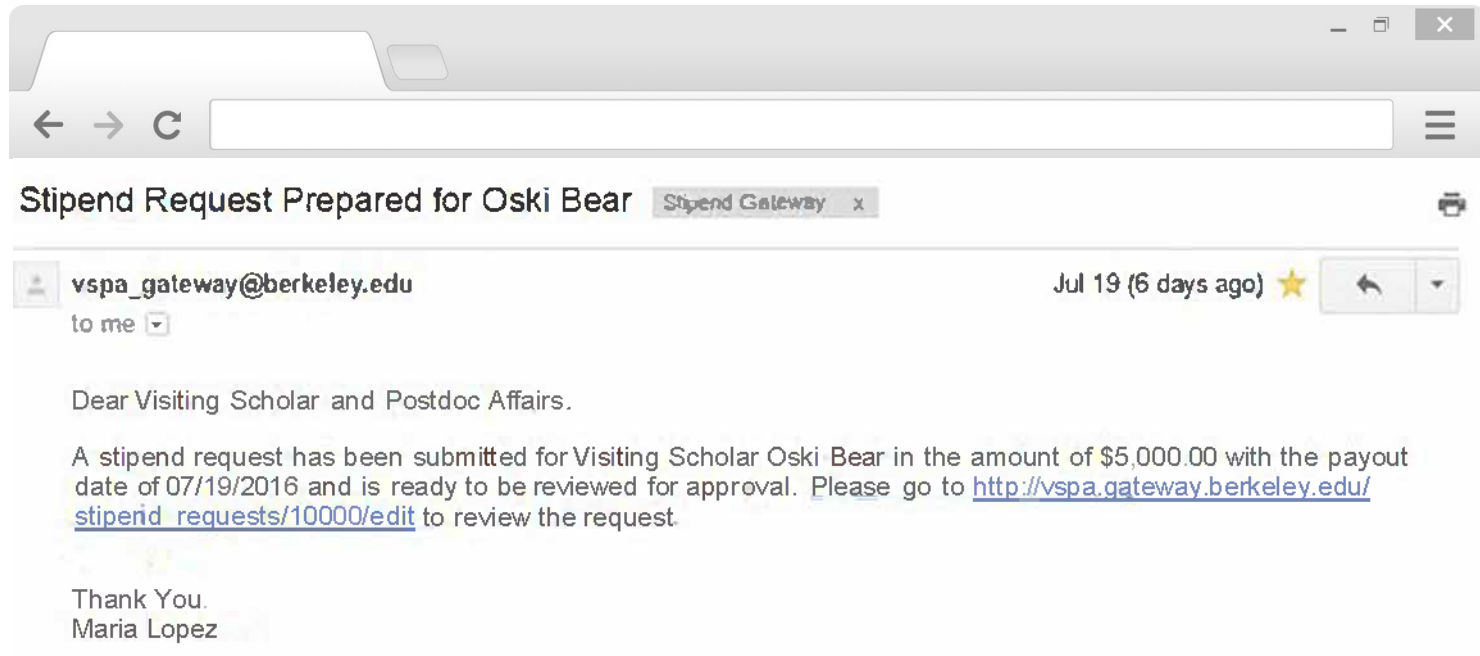
Personal Data

Family Name: Bear
First Name: Oski

VSPA Gateway
Visitors
Browse Lists
Invite VSR
Invite PD
Invite VS
Instructions
Users
Reports
Logout
VSPA Home Web Site

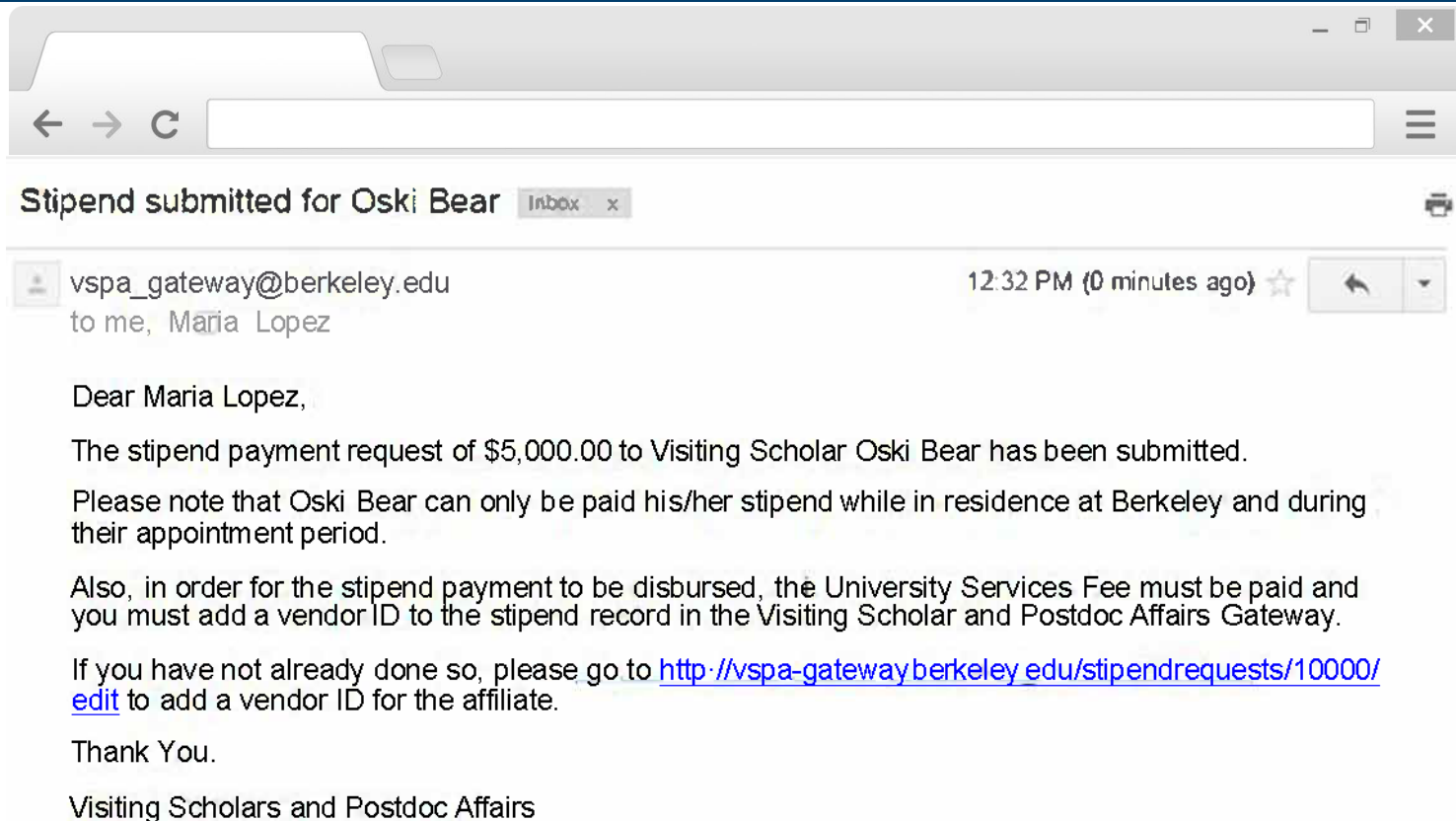
Instead of an email confirmation to the **Disbursement Preparer**, this **on-screen message** will appear

Visiting Scholar/Student Researcher Stipend Disbursement Process



VSPA will review the stipend request to see that it meets all requirements

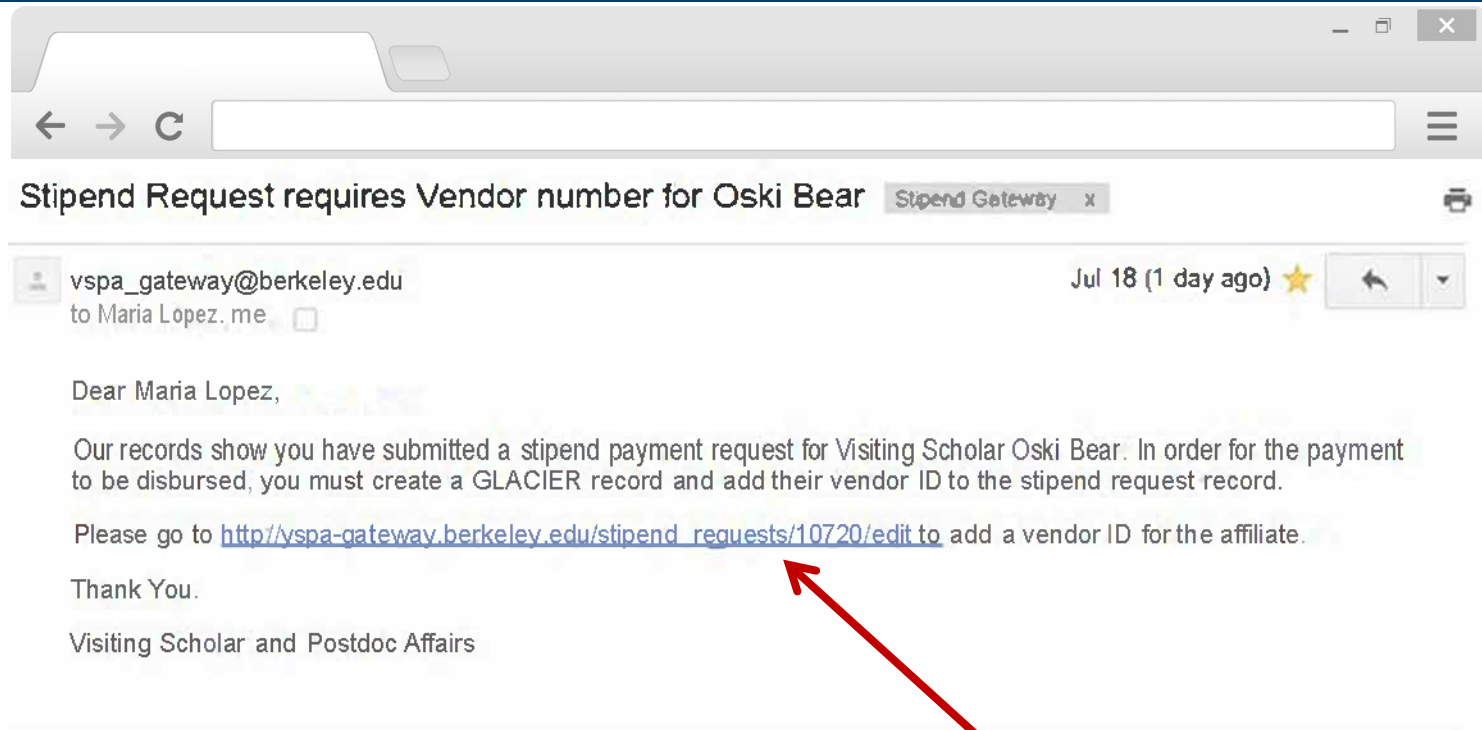
Visiting Scholar/Student Researcher Stipend Disbursement Process



If the stipend request meets all requirements, the **Disbursement Preparer** will receive the above email with a reminder to enter the **Vendor Number** and to pay the **University Services Fee**

This email serves as the approval email that can be sent to Berkeley International Office as confirmation of funding

Visiting Scholar/Student Researcher Stipend Disbursement Process



Within two weeks of the **Date to Start Payment**, if a **vendor number** has not been added to the record, an email reminder will be sent to the **Disbursement Preparer**

Click on the link in the email to add a **vendor ID**

Visiting Scholar/Student Researcher Stipend Disbursement Process

Preparer

I, as the preparer of the proposed stipend request, have confirmed authorization from the appropriate financial head of the department to submit this application. True

Stipend

Visitor Name: Oski Bear
Request Status: In-Progress
Disbursement Preparer
Comments:

Include instructions for payment delivery here, e.g. Hold for Pickup, EFT has been set up. If payment is for a visit that has ended, include the payment date(s) here.

HCM ID: 71831
* Vendor Number: 55555
US Citizen: False
Visa Type: J-1 Exchange Visitor (Scholar)
This field is populated from the visitor record in the Gateway. Please contact VSPA if this information is incorrect.

* Payment Frequency: Single Payment
* Purpose of Payment: Living Expenses
* Total Award: \$ 5000.0
If the stipend request is more than \$10,000, you can upload an exception letter after you submit this request.

Stipend Update Information

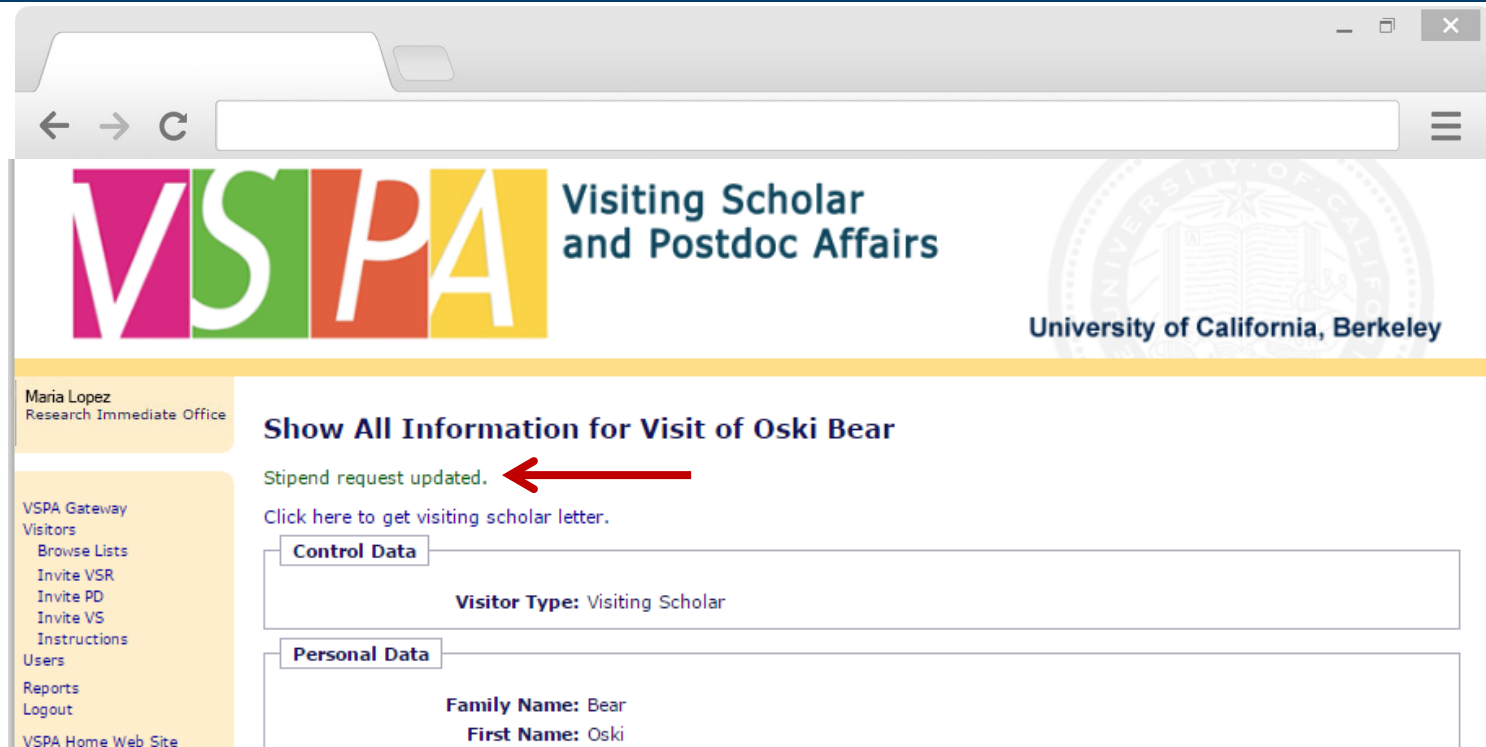
Creation Date: Jul. 19, 2016 19:31
Last Update Date: Jul. 19, 2016 19:32
Last Modified by: Rachel Min Park

Save Changes

Enter in the **Vendor Number**

Press **Save Changes**

Visiting Scholar/Student Researcher Stipend Disbursement Process



The screenshot shows a web browser window displaying the VSPA (Visiting Scholar and Postdoc Affairs) website. The header includes the VSPA logo and the text "Visiting Scholar and Postdoc Affairs" and "University of California, Berkeley". The main content area shows a message: "Stipend request updated." with a red arrow pointing to it. Below the message are sections for "Control Data" and "Personal Data". The "Control Data" section shows "Visitor Type: Visiting Scholar". The "Personal Data" section shows "Family Name: Bear" and "First Name: Oski".

Visiting Scholar and Postdoc Affairs
University of California, Berkeley

Maria Lopez
Research Immediate Office

Show All Information for Visit of Oski Bear

Stipend request updated. ←

[Click here to get visiting scholar letter.](#)

Control Data

Visitor Type: Visiting Scholar

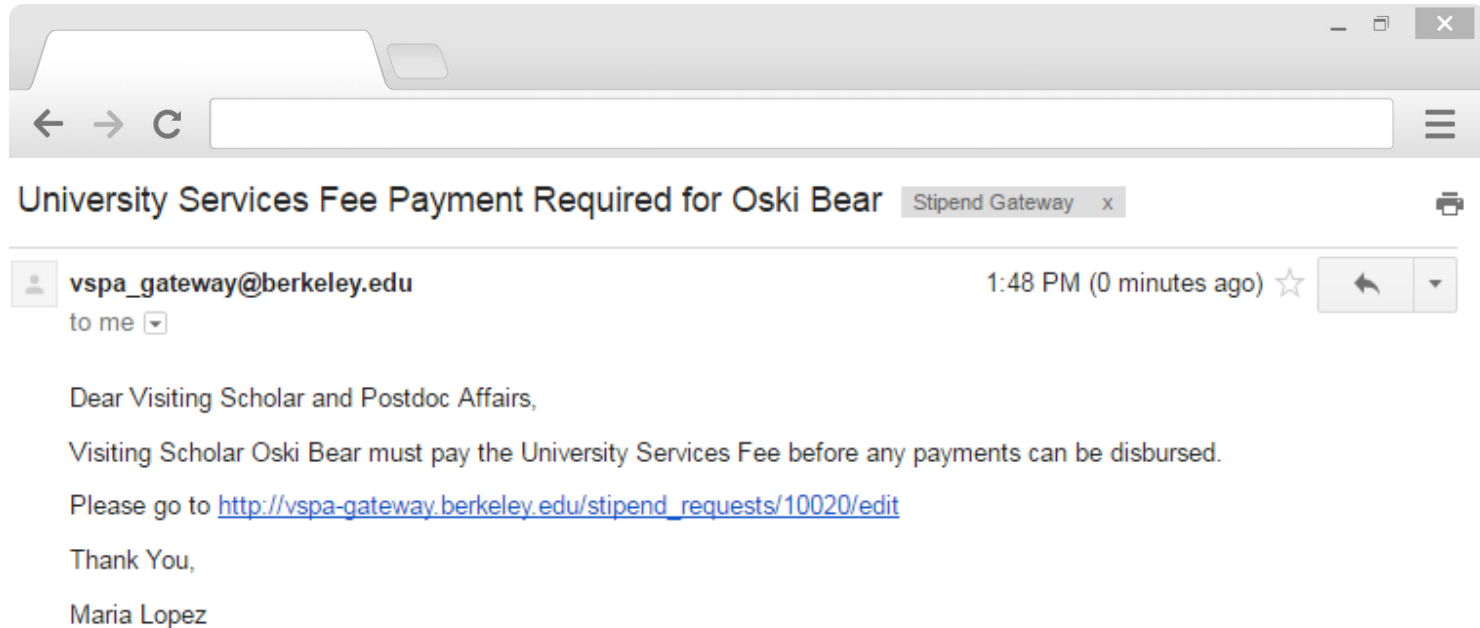
Personal Data

Family Name: Bear
First Name: Oski

VSPA Gateway
Visitors
Browse Lists
Invite VSR
Invite PD
Invite VS
Instructions
Users
Reports
Logout
VSPA Home Web Site

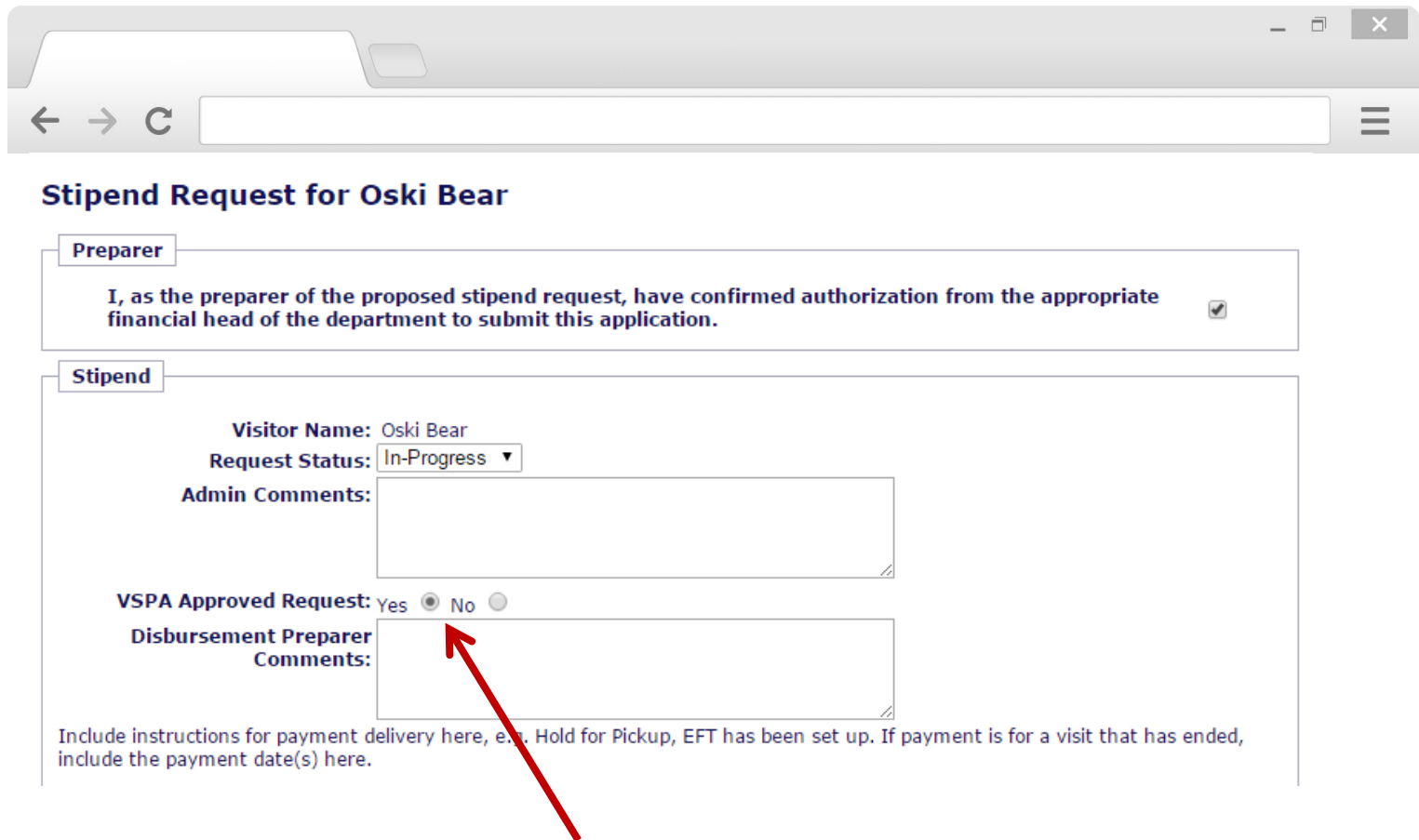
Instead of an email notification to the **Disbursement Preparer**, this on-screen message will appear

Visiting Scholar/Student Researcher Stipend Disbursement Process



VSPA will then verify that the **Vendor Number** has been added and **University Services Fee** has been paid

Visiting Scholar/Student Researcher Stipend Disbursement Process



Stipend Request for Oski Bear

Preparer

I, as the preparer of the proposed stipend request, have confirmed authorization from the appropriate financial head of the department to submit this application.

Stipend

Visitor Name: Oski Bear
Request Status: In-Progress ▾
Admin Comments:

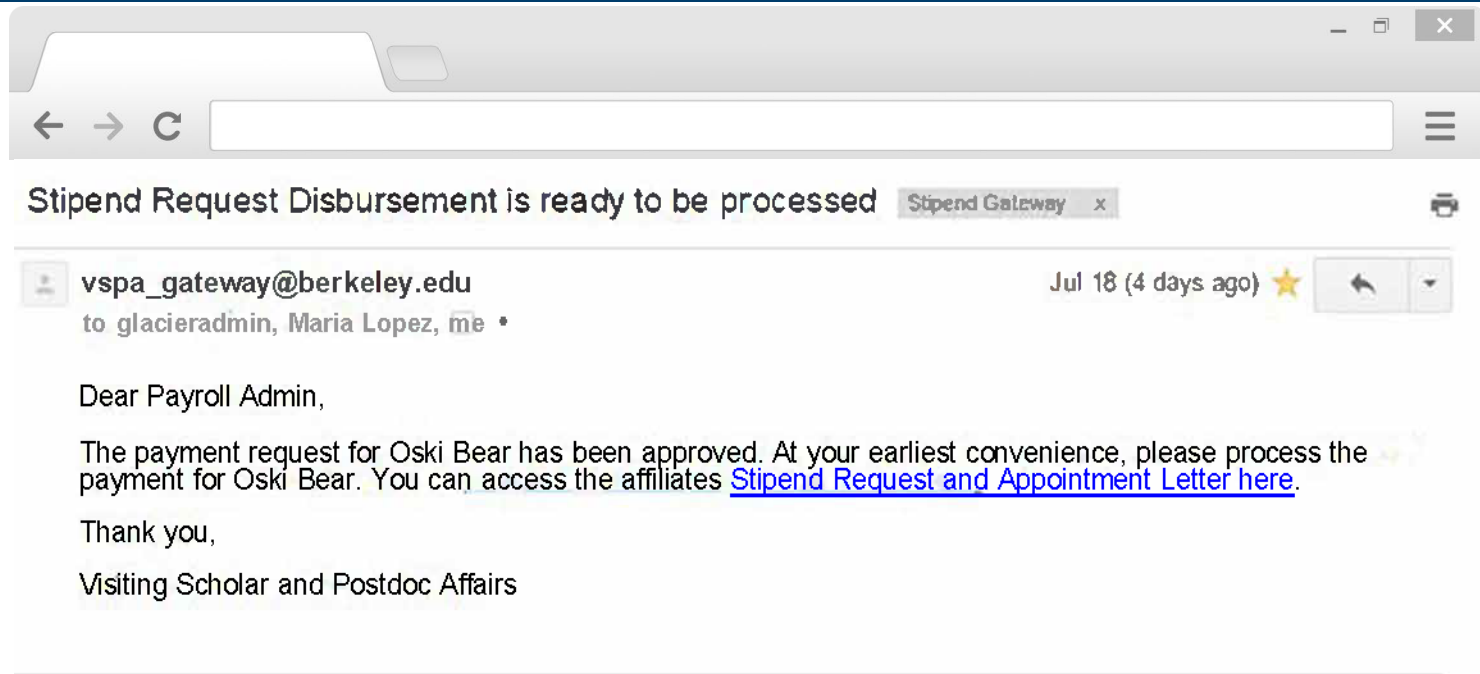
VSPA Approved Request: Yes No

Disbursement Preparer Comments:

Include instructions for payment delivery here, e.g. Hold for Pickup, EFT has been set up. If payment is for a visit that has ended, include the payment date(s) here.

If all requirements have been met, the VSPA Program approves the stipend disbursement request

Visiting Scholar/Student Researcher Stipend Disbursement Process



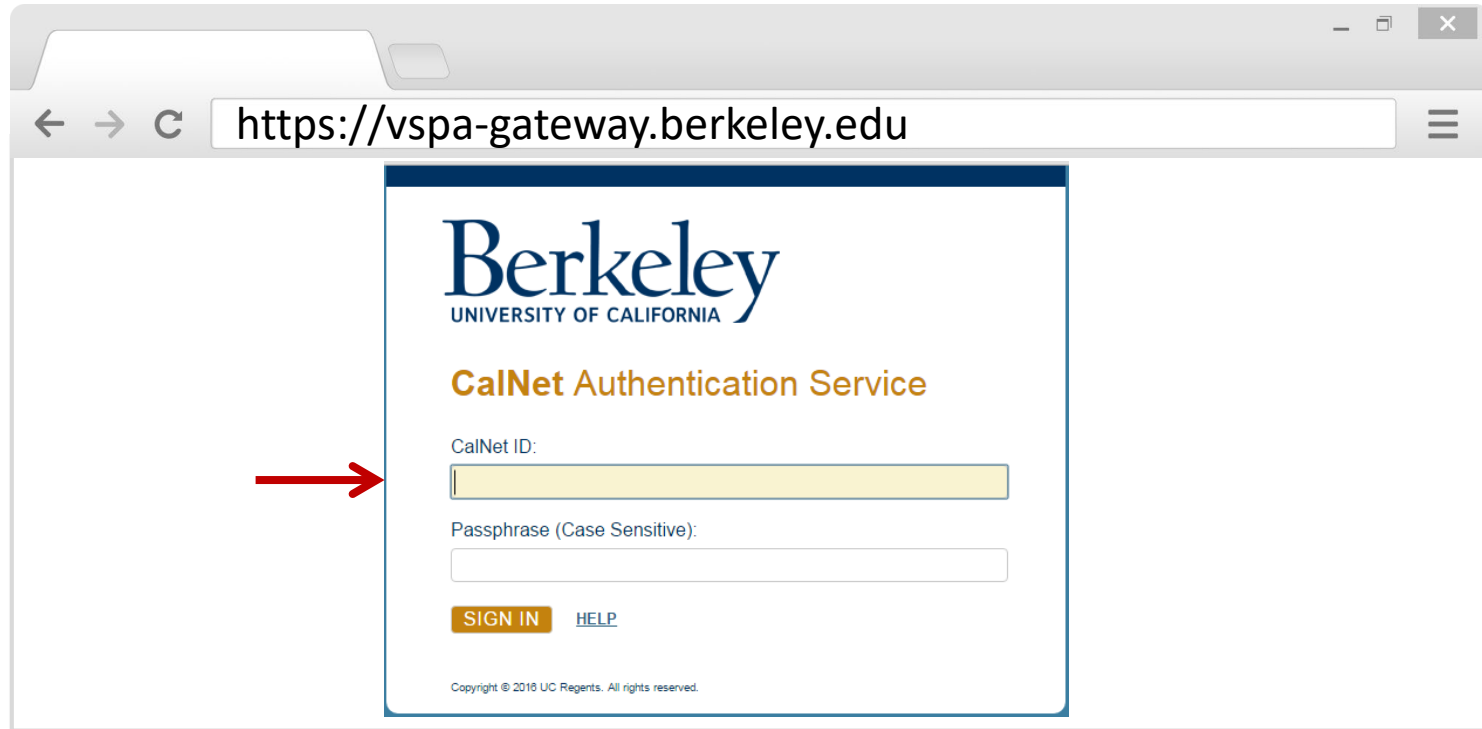
The Payroll Office will receive the above email to process the stipend disbursement request within two weeks of the **Date to Start Payment**

The **Disbursement Preparer** and the **VSPA Office** will be copied on this email



Following Up on the Status of a Stipend Disbursement Request

Visiting Scholar/Student Researcher Stipend Disbursement Process

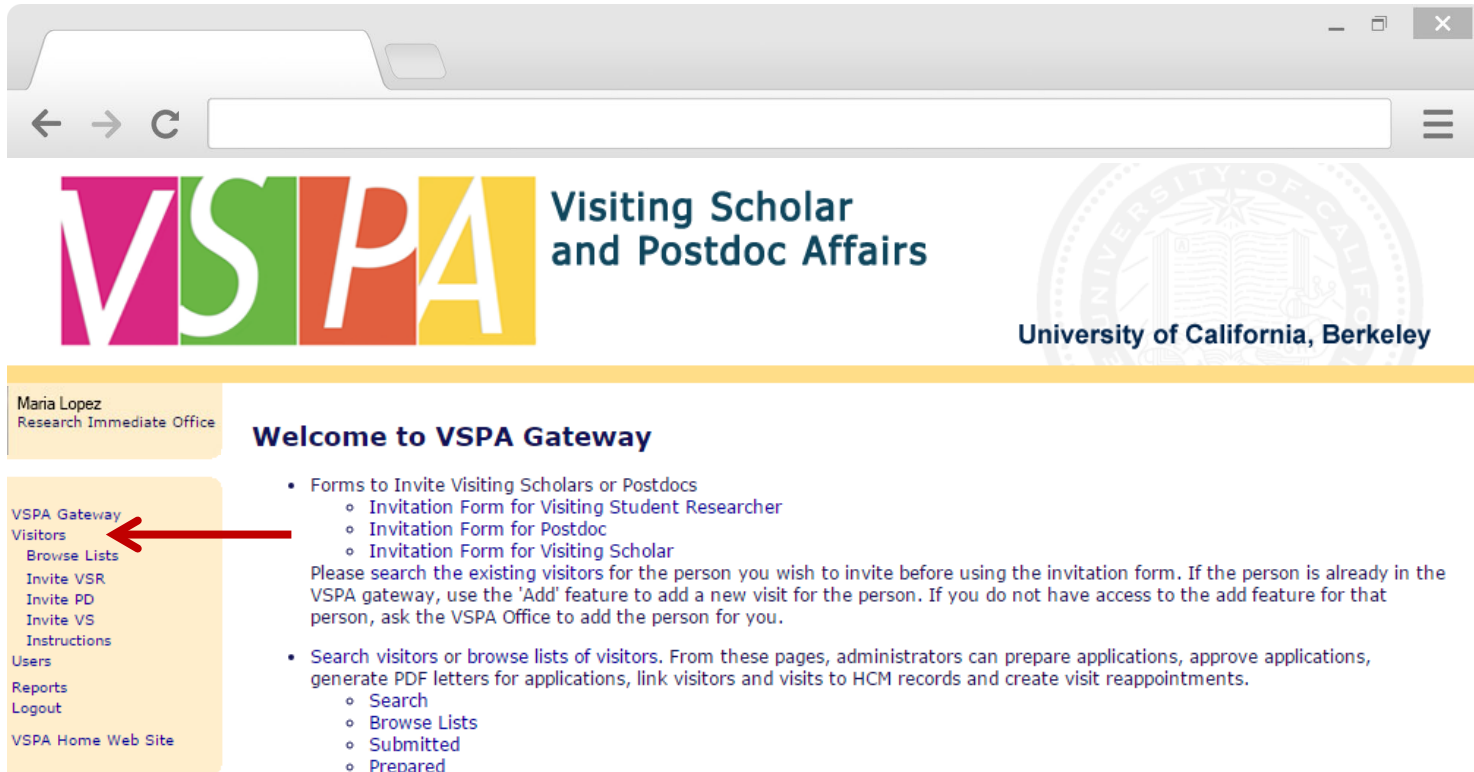


The screenshot shows a web browser window with the address bar displaying <https://vspa-gateway.berkeley.edu>. The main content area features the Berkeley University of California logo at the top, followed by the heading "CalNet Authentication Service". Below this, there are two input fields: "CalNet ID:" and "Passphrase (Case Sensitive):". A red arrow points to the "CalNet ID:" input field. At the bottom of the form, there are two buttons: "SIGN IN" and "HELP". A small copyright notice at the very bottom reads "Copyright © 2016 UC Regents. All rights reserved."

Go to the **VSPA Gateway**: <https://vspa-gateway.berkeley.edu>

Log in with your **CalNet ID**

Visiting Scholar/Student Researcher Stipend Disbursement Process



The screenshot shows a web browser window displaying the VSPA Gateway website. The browser's address bar is empty. The website header features the VSPA logo (with letters V, S, P, A in pink, green, orange, and yellow respectively) and the text "Visiting Scholar and Postdoc Affairs" and "University of California, Berkeley". A yellow horizontal bar separates the header from the main content. On the left, a sidebar lists navigation options: "VSPA Gateway", "Visitors", "Browse Lists", "Invite VSR", "Invite PD", "Invite VS", "Instructions", "Users", "Reports", "Logout", and "VSPA Home Web Site". A red arrow points to the "Visitors" link. The main content area is titled "Welcome to VSPA Gateway" and includes a list of links and instructions. A faint University of California seal is visible in the background.

Maria Lopez
Research Immediate Office

Welcome to VSPA Gateway

- Forms to Invite Visiting Scholars or Postdocs
 - Invitation Form for Visiting Student Researcher
 - Invitation Form for Postdoc
 - Invitation Form for Visiting Scholar

Please search the existing visitors for the person you wish to invite before using the invitation form. If the person is already in the VSPA gateway, use the 'Add' feature to add a new visit for the person. If you do not have access to the add feature for that person, ask the VSPA Office to add the person for you.

- Search visitors or browse lists of visitors. From these pages, administrators can prepare applications, approve applications, generate PDF letters for applications, link visitors and visits to HCM records and create visit reappointments.
 - Search
 - Browse Lists
 - Submitted
 - Prepared
 - Approved
 - Active
 - Expired
- Pages to Manage VSPA Departments and Users
 - Manage Users
 - Manage Departments
 - Settings

Click on **Visitors** to look up scholar

Visiting Scholar/Student Researcher Stipend Disbursement Process

The screenshot shows a web browser window displaying the VSPA (Visiting Scholar and Postdoc Affairs) website for the University of California, Berkeley. The page header includes the VSPA logo and the text "Visiting Scholar and Postdoc Affairs" and "University of California, Berkeley".

The user is logged in as Maria Lopez, Research Immediate Office. The main section is titled "Search for Visitors".

Search Conditions:

- Family Name: bear
- First Name: oski
- HCM ID: (empty)
- Visitor Type: Any
- Status: Any
- Campus Sponsoring Unit: Any

A "Search" button is located below the search conditions.

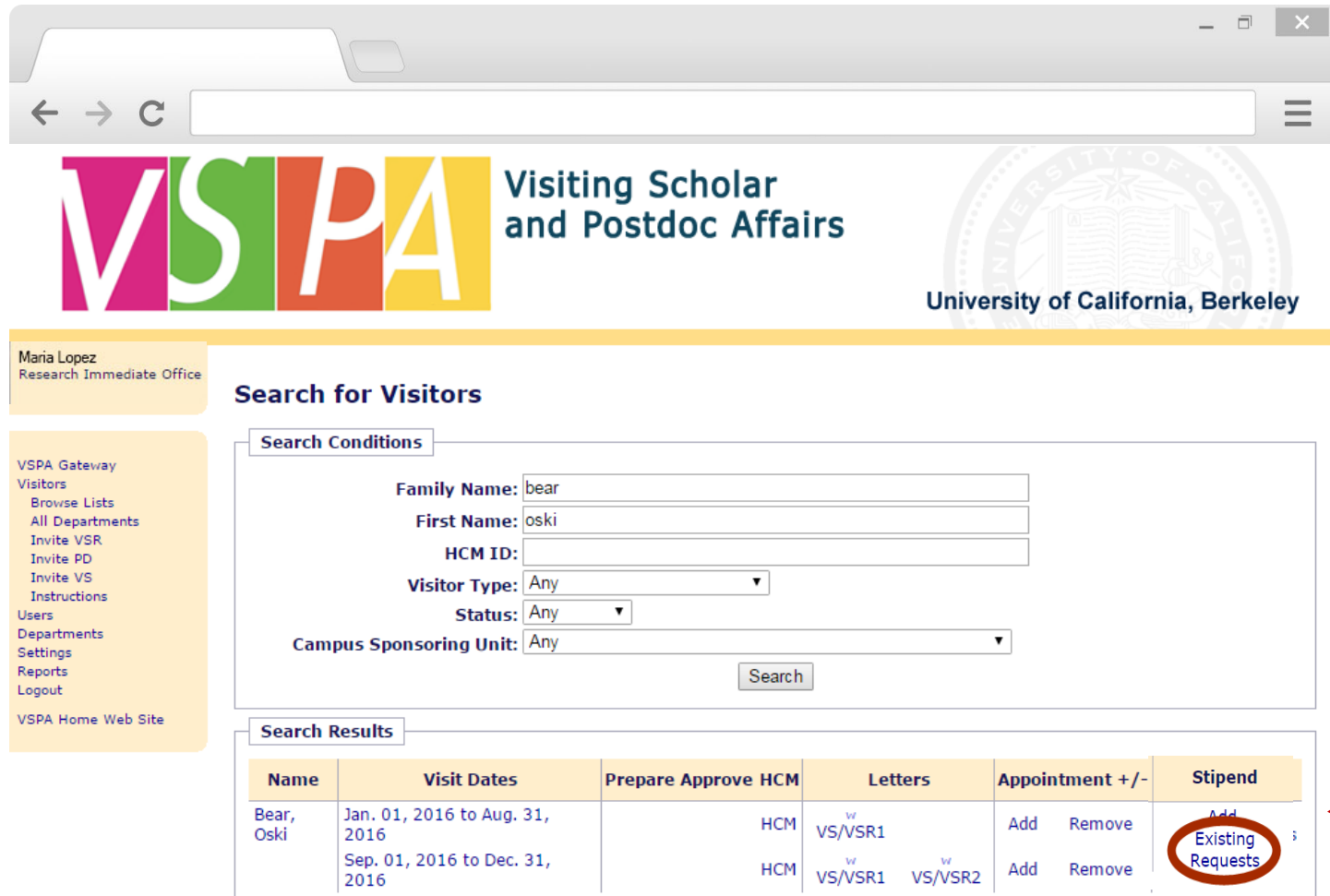
Search Results:

Name	Visit Dates	Prepare Approve HCM	Letters	Appointment +/-	Stipend
Bear, Oski	Jan. 01, 2016 to Aug. 31, 2016	HCM	^w VS/VSR1	Add Remove	Add Existing Requests
	Sep. 01, 2016 to Dec. 31, 2016	HCM	^w VS/VSR1 ^w VS/VSR2	Add Remove	Add

A red arrow points to the "Name" column of the search results table.

Search the scholar's name to bring up their record

Visiting Scholar/Student Researcher Stipend Disbursement Process



The screenshot shows a web browser window displaying the VSPA (Visiting Scholar and Postdoc Affairs) website for the University of California, Berkeley. The page features a search interface for visitors. The search results table is as follows:

Name	Visit Dates	Prepare Approve HCM	Letters	Appointment +/-	Stipend
Bear, Oski	Jan. 01, 2016 to Aug. 31, 2016	HCM	^w VS/VSR1	Add Remove	Add Existing Requests
	Sep. 01, 2016 to Dec. 31, 2016	HCM	^w VS/VSR1 ^w VS/VSR2	Add Remove	

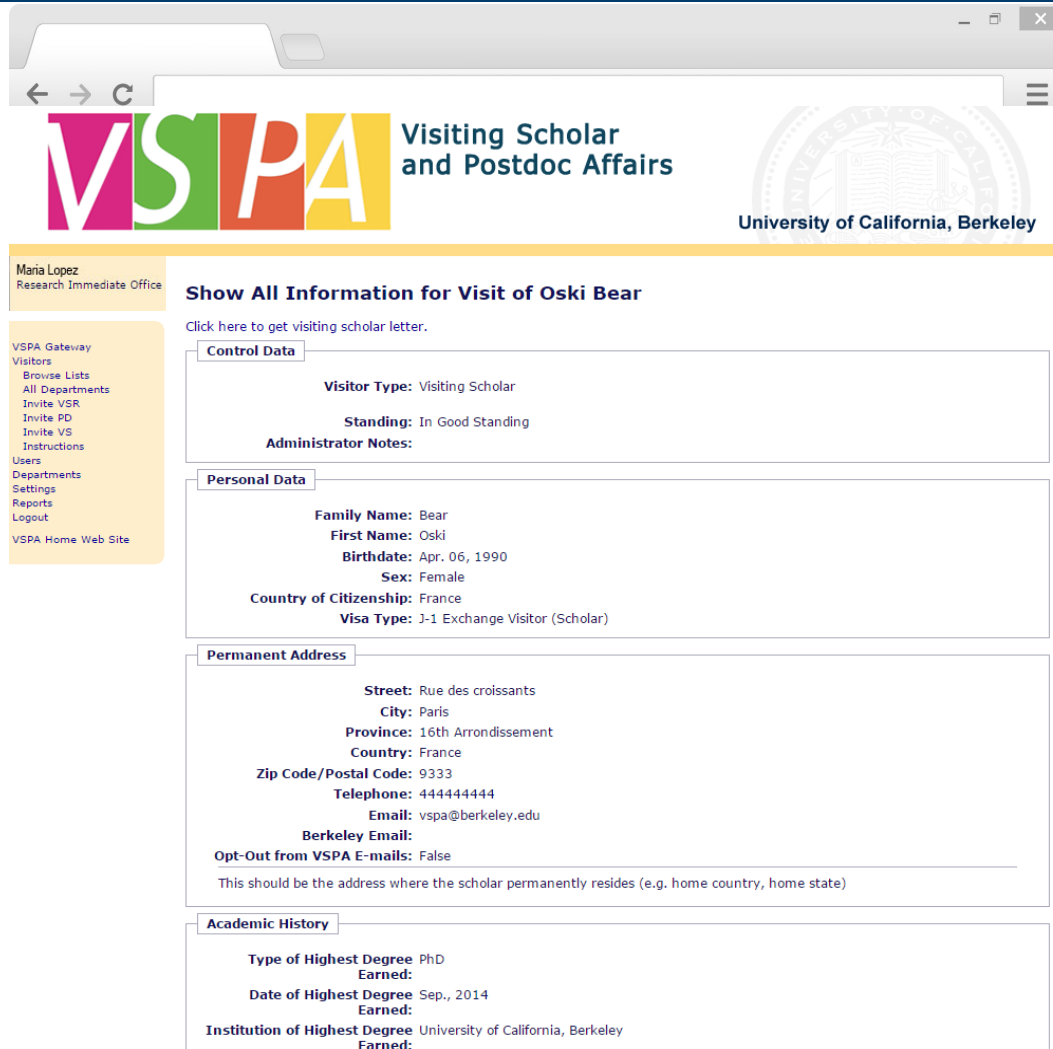
A red arrow points to the "Existing Requests" link in the Stipend column of the first row.

Under the **Stipend** column, click on **Existing Requests**

Note:

Add is to submit an additional stipend request; **Existing Requests** is to **Edit** or **View** previously submitted requests.

Visiting Scholar/Student Researcher Stipend Disbursement Process



The screenshot shows a web browser window displaying the VSPA (Visiting Scholar and Postdoc Affairs) website for the University of California, Berkeley. The page title is "Show All Information for Visit of Oski Bear". The user is logged in as Maria Lopez, Research Immediate Office. The page contains a sidebar with navigation links and a main content area with several sections: Control Data, Personal Data, Permanent Address, and Academic History.

Control Data

- Visitor Type: Visiting Scholar
- Standing: In Good Standing
- Administrator Notes:

Personal Data

- Family Name: Bear
- First Name: Oski
- Birthdate: Apr. 06, 1990
- Sex: Female
- Country of Citizenship: France
- Visa Type: J-1 Exchange Visitor (Scholar)

Permanent Address

- Street: Rue des croissants
- City: Paris
- Province: 16th Arrondissement
- Country: France
- Zip Code/Postal Code: 9333
- Telephone: 444444444
- Email: vspa@berkeley.edu
- Berkeley Email:
- Opt-Out from VSPA E-mails: False

This should be the address where the scholar permanently resides (e.g. home country, home state)

Academic History

- Type of Highest Degree: PhD
- Earned:
- Date of Highest Degree: Sep., 2014
- Earned:
- Institution of Highest Degree: University of California, Berkeley
- Earned:

This will take you to the scholar's record

Visiting Scholar/Student Researcher Stipend Disbursement Process

← → ↻

☰

Stipend Totals

Stipend	Request Date	Status	Total Amount
1	Jul. 22, 2016	In-Progress	\$1,000.00

Stipend 1

Edit Stipend
View Stipend

Visitor Name: Oski Bear
Request Status: In-Progress
Creation Date: Jul. 22, 2016 15:45
Disbursement Preparer
Comments:

HCM ID: 71831

*** Vendor Number:**

US Citizen: False
Visa Type:

This field is populated from the visitor record in the Gateway. Please contact VSPA if this information is incorrect.

*** Payment Frequency:** Monthly Payment
*** Purpose of Payment:** Living Expenses
*** Total Award:** \$ 1000.0

If the stipend request is more than \$10,000, you can upload an exception letter after you submit this request.

PAYMENT SCHEDULE

Amount	# of Payments	Amount of Each Payment	Date to Start Payment	BU	Account	Fund	Org	Program	CF1	CF2
1000.0	1	1000.0	Jul. 22, 2016	1	55030	68395	26474	72		

Department Submitter: Maria Lopez (captured when form submitted)

*** Campus Sponsoring Unit:** Visiting Scholar and Postdoc Affairs Program
Stipend Exception Letter (if needed):

Scroll to the bottom of their record to see the status and information for all stipend requests

Visiting Scholar/Student Researcher Stipend Disbursement Process

Stipend Totals

Stipend	Request Date	Status	Total Amount
1	Jul. 22, 2016	In-Progress	\$1,000.00

Stipend 1

[Edit Stipend](#) [View Stipend](#)

Visitor Name: Oski Bear
Request Status: In-Progress
Creation Date: Jul. 22, 2016 15:45
Disbursement Preparer
Comments:

HCM ID: 71831
*** Vendor Number:**
US Citizen: False
Visa Type:
This field is populated from the visitor record in the Gateway. Please contact VSPA if this information is incorrect.

*** Payment Frequency:** Monthly Payment
*** Purpose of Payment:** Living Expenses
*** Total Award:** \$ 1000.0
If the stipend request is more than \$10,000, you can upload an exception letter after you submit this request.

PAYMENT SCHEDULE

Amount	# of Payments	Amount of Each Payment	Date to Start Payment	BU	Account	Fund	Org	Program	CF1	CF2
1000.0	1	1000.0	Jul. 22, 2016	1	55030	68395	26474	72		

Department Submitter: Maria Lopez (captured when form submitted)
*** Campus Sponsoring Unit:** Visiting Scholar and Postdoc Affairs Program
Stipend Exception Letter (if needed):

Click on **Edit Stipend** for a particular stipend disbursement request to add information

Visiting Scholar/Student Researcher Stipend Disbursement Process

Stipend Request for Oski Bear

Preparer
I, as the preparer of the proposed stipend request, have confirmed authorization from the appropriate financial head of the department to submit this application.

Stipend

Visitor Name: Oski Bear
Request Status: In-Progress
Creation Date: Jul. 22, 2016 15:45
Disbursement Preparer
Comments:
HCM ID:
Vendor Number:

US Citizen: Yes No
Visa Type: J-1 Exchange Visitor (Scholar)

* Payment Frequency: Monthly Payment
Monthly payment period:
* Purpose of Payment: Living Expenses
* Total Award: \$ 1000.0

PAYMENT SCHEDULE

Amount	# of Payments	Amount of Each Payment	Date to Start Payment	BU	Account	Fund	Org	Program	CF1	CF2
1000	1	1000	Jul. 22, 2016	1	55030	68395	26474	72		

Department Submitter: Maria Lopez (captured when form submitted)

* Campus Sponsoring Unit: Visiting Scholar and Postdoc Affairs Program
Stipend Exception Letter (if needed): No file chosen

[Click here to get the Appointment Letter](#)

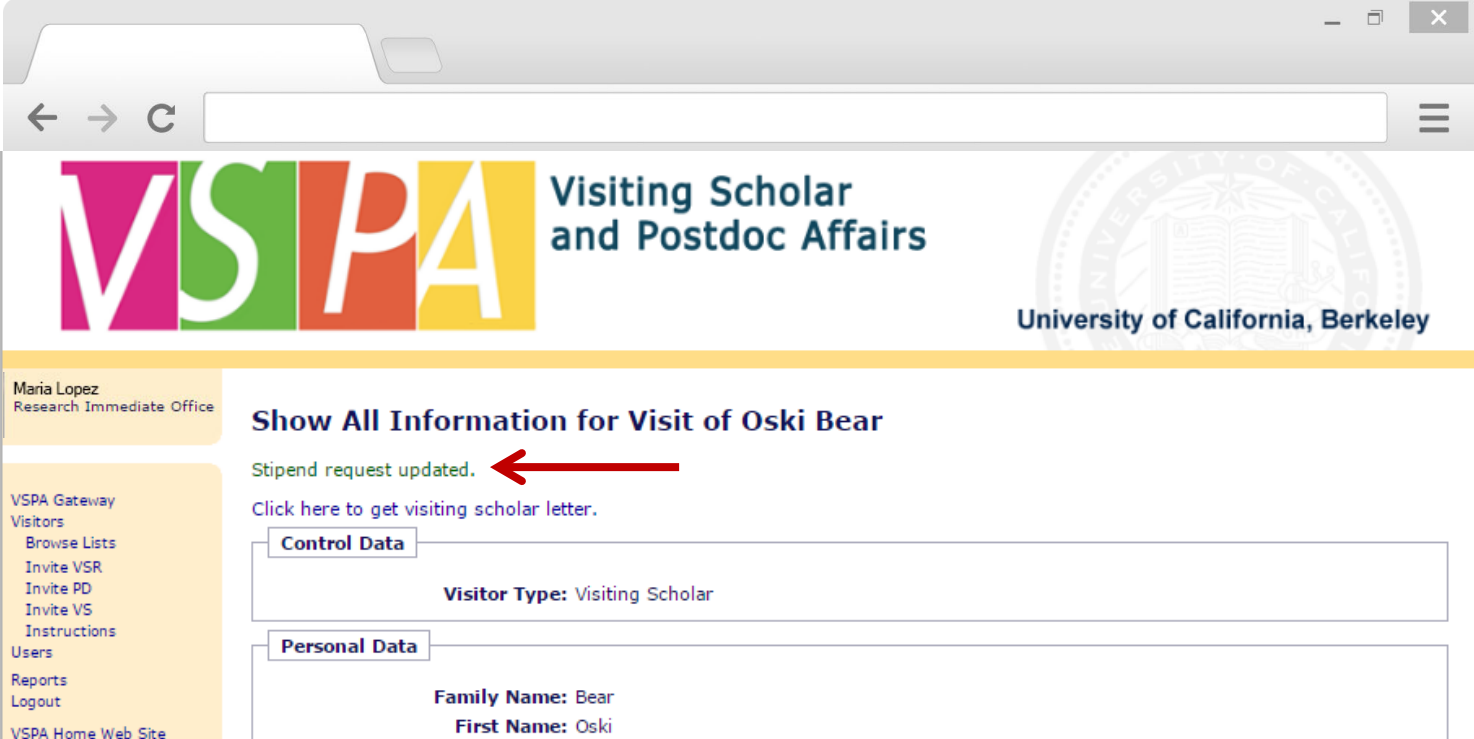
Stipend Update Information

Creation Date: Jul. 22, 2016 15:45
Last Update Date: Jul. 22, 2016 15:46
Last Modified by: Maria Lopez

You can add **Vendor Number** or upload a **Stipend Exception Letter ONLY**

Press **Save Changes** once you are done

Visiting Scholar/Student Researcher Stipend Disbursement Process



The screenshot shows a web browser window displaying the VSPA (Visiting Scholar and Postdoc Affairs) website. The header includes the VSPA logo and the text "Visiting Scholar and Postdoc Affairs" and "University of California, Berkeley". The main content area shows a message: "Stipend request updated." with a red arrow pointing to it. Below the message are sections for "Control Data" and "Personal Data".

Control Data

Visitor Type: Visiting Scholar

Personal Data

Family Name: Bear
First Name: Oski

Instead of an email notification to the **Disbursement Preparer**, this on-screen message will appear



Exceptions to the \$20,000 Stipend Disbursement Limit

Visiting Scholar/Student Researcher Stipend Disbursement Process

The screenshot shows a web browser window displaying the VSPA (Visiting Scholar and Postdoc Affairs) website. The header includes the VSPA logo and the text "Visiting Scholar and Postdoc Affairs" and "University of California, Berkeley". A sidebar on the left lists navigation options such as "VSPA Gateway", "Visitors", "Browse Lists", "Invite VSR", "Invite PD", "Invite VS", "Instructions", "Users", "Reports", "Logout", and "VSPA Home Web Site". The main content area is titled "Search for Visitors" and contains a "Search Conditions" form with fields for Family Name (bear), First Name (oski), HCM ID, Visitor Type (Any), Status (Any), and Campus Sponsoring Unit (Any). A "Search" button is located below the form. Below the search form is a "Search Results" table with the following data:

Name	Visit Dates	Prepare Approve HCM	Letters	Appointment +/-	Stipend
Bear, Oski	Jan. 01, 2016 to Aug. 31, 2016	HCM	VS/VSR1	Add	Add Existing Requests
	Sep. 01, 2016 to Dec. 31, 2016	HCM	VS/VSR1 VS/VSR2	Add	Add

A red arrow points to the "Add Existing Requests" link in the Stipend column of the first row.

Look up the visitor's record and click **Add** in the **Stipend** column for the appointment

Visiting Scholar/Student Researcher Stipend Disbursement Process

* Payment Frequency: Single Payment

* Purpose of Payment: Living Expenses

* Total Award: \$ 25000

If the stipend request is more than \$20,000, you will receive further instructions from VSPA.

PAYMENT SCHEDULE

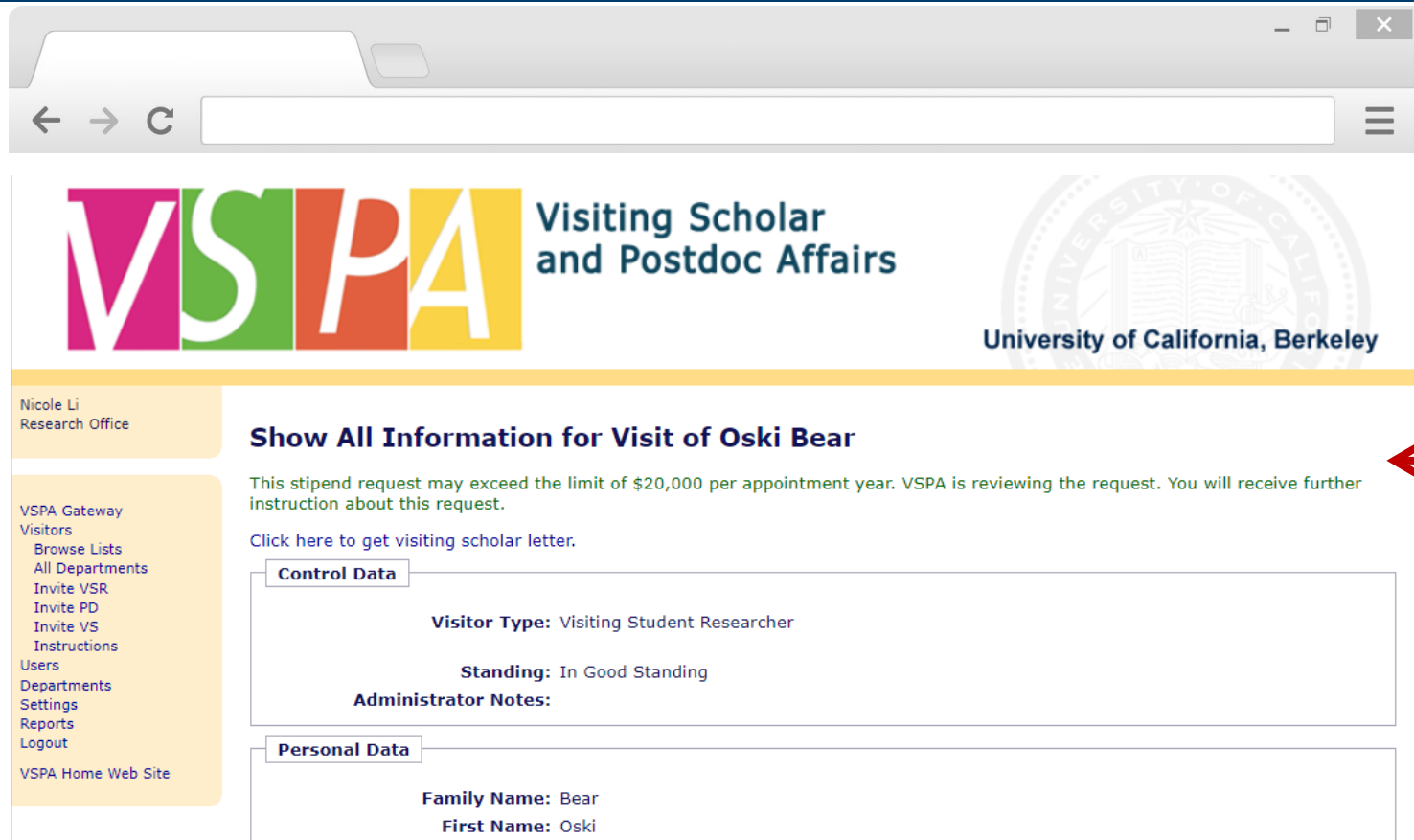
Amount	# of Payments	Amount of Each Payment	Date to Start Payment	BU	Account	Fund	Org	Program	CF1	CF2
25000	1	25000	April 9 2019	1	55030	68395	26474	72		
			April 9 2019							
			April 9 2019							
			April 9 2019							

* Campus Sponsoring Unit: Chemistry Department

If you already have an exception letter, you can upload it AFTER submitting the request.

Press **Submit** after entering all required information

Visiting Scholar/Student Researcher Stipend Disbursement Process



The screenshot shows a web browser window displaying the VSPA (Visiting Scholar and Postdoc Affairs) website. The header includes the VSPA logo and the text "Visiting Scholar and Postdoc Affairs" and "University of California, Berkeley". The user is logged in as Nicole Li, Research Office. The main content area shows a link to "Show All Information for Visit of Oski Bear". Below this link, a green message states: "This stipend request may exceed the limit of \$20,000 per appointment year. VSPA is reviewing the request. You will receive further instruction about this request." A red arrow points to this message. Below the message, there are two sections: "Control Data" and "Personal Data". The "Control Data" section shows "Visitor Type: Visiting Student Researcher", "Standing: In Good Standing", and "Administrator Notes:". The "Personal Data" section shows "Family Name: Bear" and "First Name: Oski".

Nicole Li
Research Office

Show All Information for Visit of Oski Bear

This stipend request may exceed the limit of \$20,000 per appointment year. VSPA is reviewing the request. You will receive further instruction about this request.

[Click here to get visiting scholar letter.](#)

Control Data

Visitor Type: Visiting Student Researcher

Standing: In Good Standing

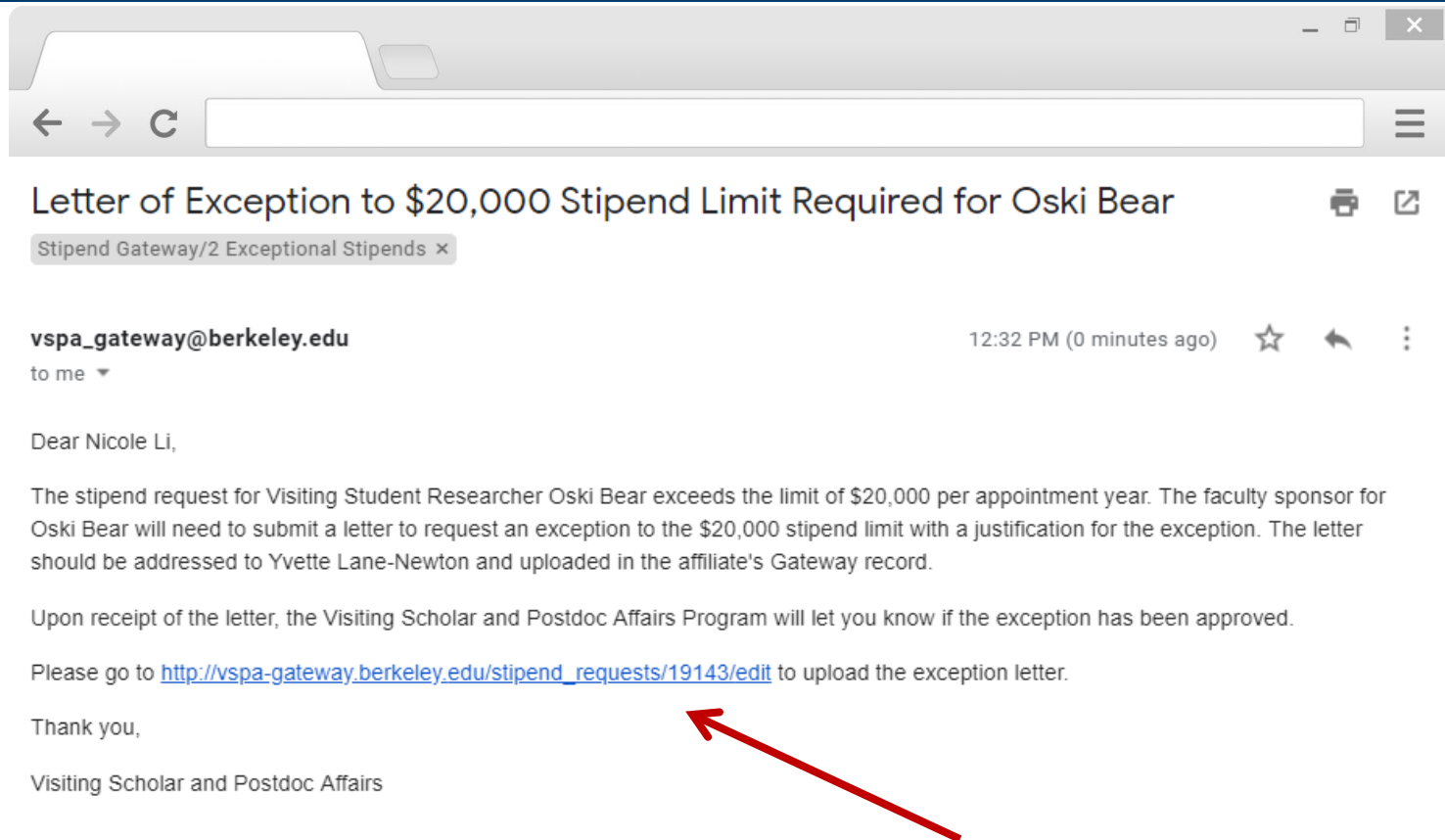
Administrator Notes:

Personal Data

Family Name: Bear
First Name: Oski

If the stipend request exceeds the \$10,000 limit, an on-screen message will appear

Visiting Scholar/Student Researcher Stipend Disbursement Process



If the cumulative stipend request amount is over \$20,000 in one **APPOINTMENT YEAR**, this email will be sent to the **Disbursement Preparer**

Click on the link to go to the scholar's stipend request and upload the exceptional approval letter

Visiting Scholar/Student Researcher Stipend Disbursement Process



PAYMENT SCHEDULE

Amount	# of Payments	Amount of Each Payment	Date to Start Payment	BU	Account	Fund	Org	Program	CF1	CF2
25000	1	25000	November 9 2018	1	55030	68395	26474	72		
			April 9 2019							
			April 9 2019							
			April 9 2019							

Department Submitter: Nicole Li

* Campus Sponsoring Unit: Chemistry Department

VSPA Exception Approval?: Yes No

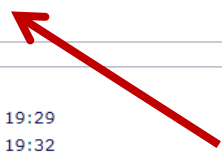
Stipend Exception Letter: No file chosen
(only if needed):

Stipend Update Information

Creation Date: Apr. 9, 2019 19:29

Last Update Date: Apr. 9, 2019 19:32

Last Modified by: Nicole Li



Select **Choose File** to upload the exceptional approval request letter (must be in Word Doc or PDF format)

Visiting Scholar/Student Researcher Stipend Disbursement Process

← → C [Address Bar] ☰

PAYMENT SCHEDULE

Amount	# of Payments	Amount of Each Payment	Date to Start Payment	BU	Account	Fund	Org	Program	CF1	CF2
25000	1	25000	November 9 2018	1	55030	68395	26474	72		
			April 9 2019							
			April 9 2019							
			April 9 2019							

Department Submitter: Nicole Li


* Campus Sponsoring Unit: Chemistry Department

VSPA Exception Approval?: Yes No

Stipend Exception Letter (only if needed): Sample Stipe... Letter.docx

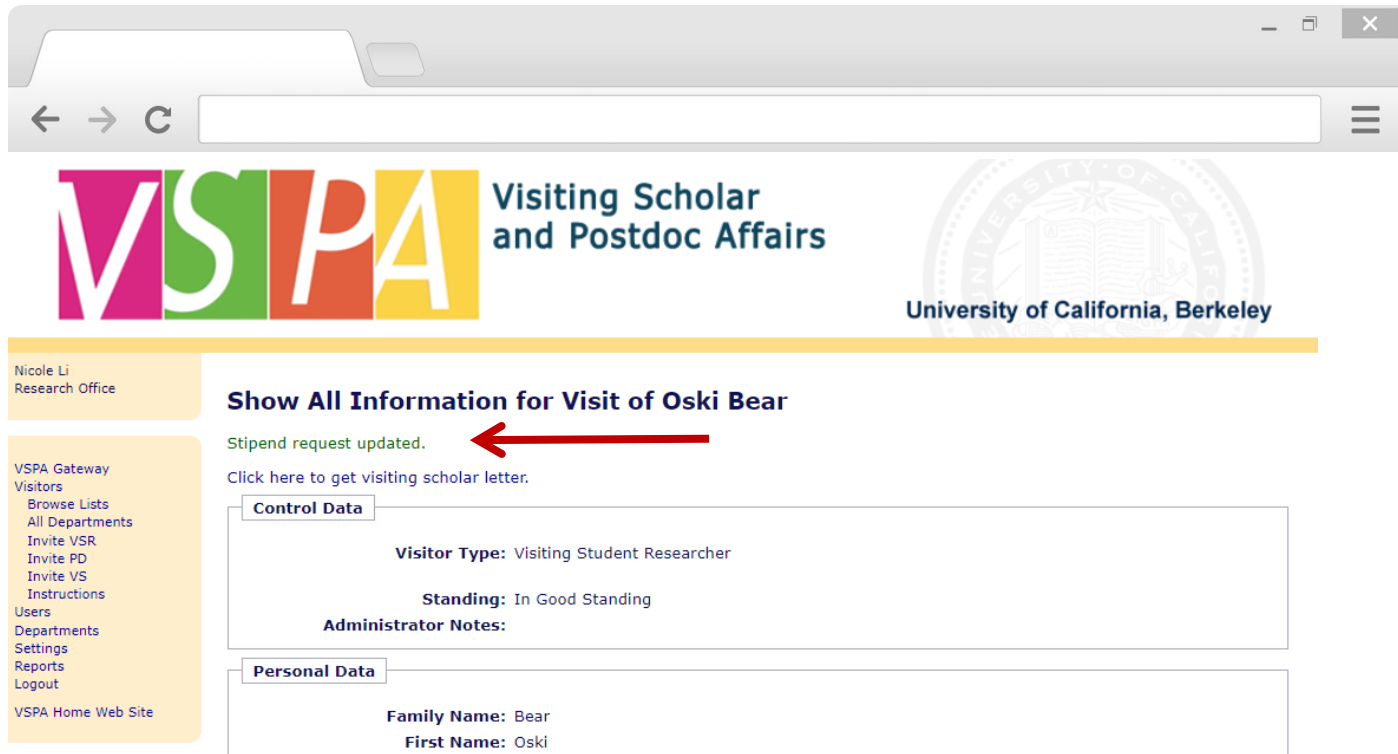
Stipend Update Information

Creation Date: Apr. 9, 2019 19:29
Last Update Date: Apr. 9, 2019 19:32
Last Modified by: Nicole Li



Press **Save Changes** once the letter has been uploaded

Visiting Scholar/Student Researcher Stipend Disbursement Process



The screenshot shows a web browser window displaying the VSPA (Visiting Scholar and Postdoc Affairs) website. The page header includes the VSPA logo and the text "Visiting Scholar and Postdoc Affairs" and "University of California, Berkeley". The main content area is titled "Show All Information for Visit of Oski Bear". A green notification message "Stipend request updated." is displayed, with a red arrow pointing to it. Below the notification, there is a link "Click here to get visiting scholar letter." and two data sections: "Control Data" and "Personal Data".

Nicole Li
Research Office

Show All Information for Visit of Oski Bear

Stipend request updated. ←

[Click here to get visiting scholar letter.](#)

Control Data

Visitor Type: Visiting Student Researcher

Standing: In Good Standing

Administrator Notes:

Personal Data

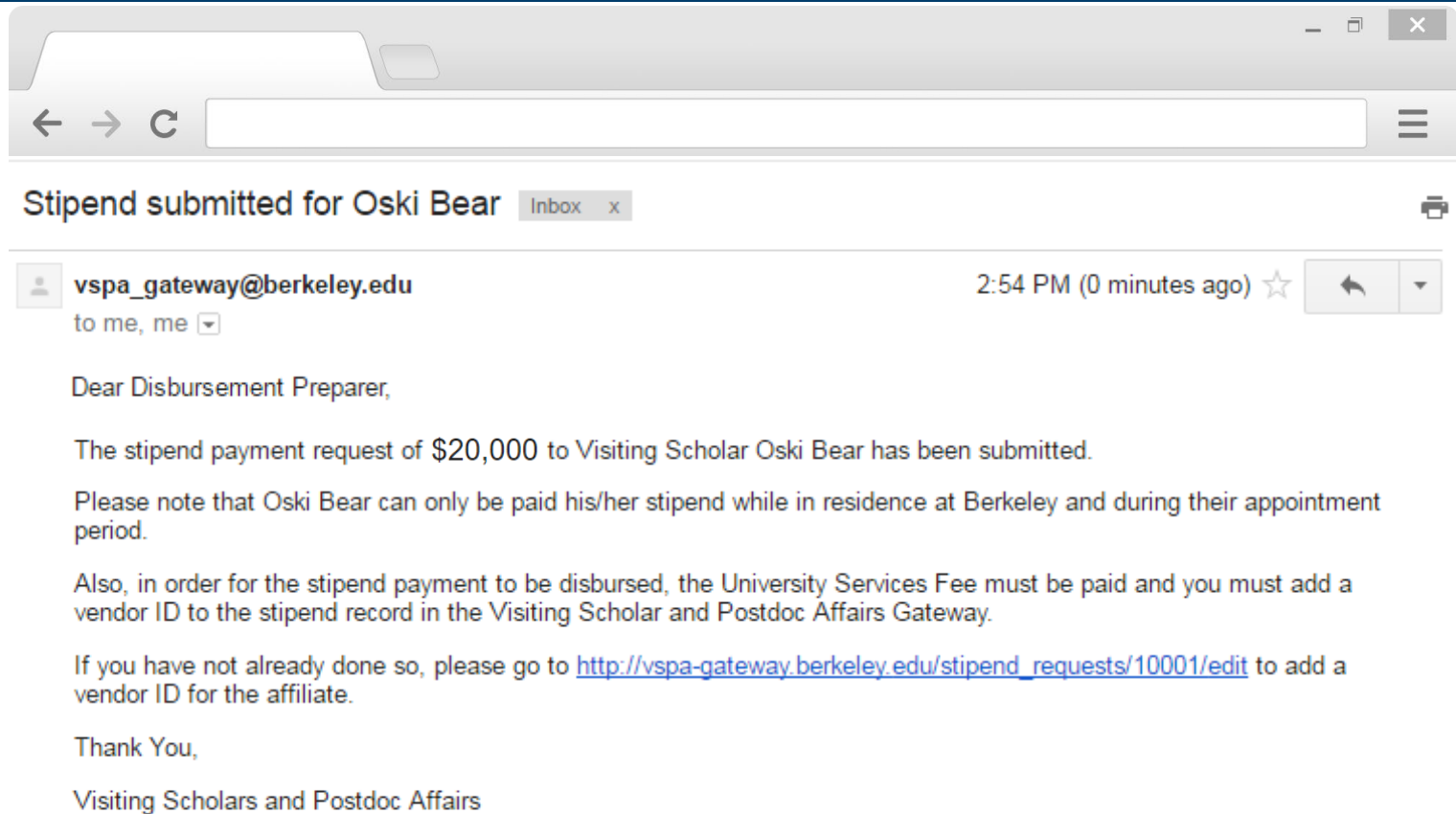
Family Name: Bear
First Name: Oski

VSPA Gateway
Visitors
Browse Lists
All Departments
Invite VSR
Invite PD
Invite VS
Instructions
Users
Departments
Settings
Reports
Logout
VSPA Home Web Site

Instead of an email notification to the **Disbursement Preparer**, this on-screen message will appear

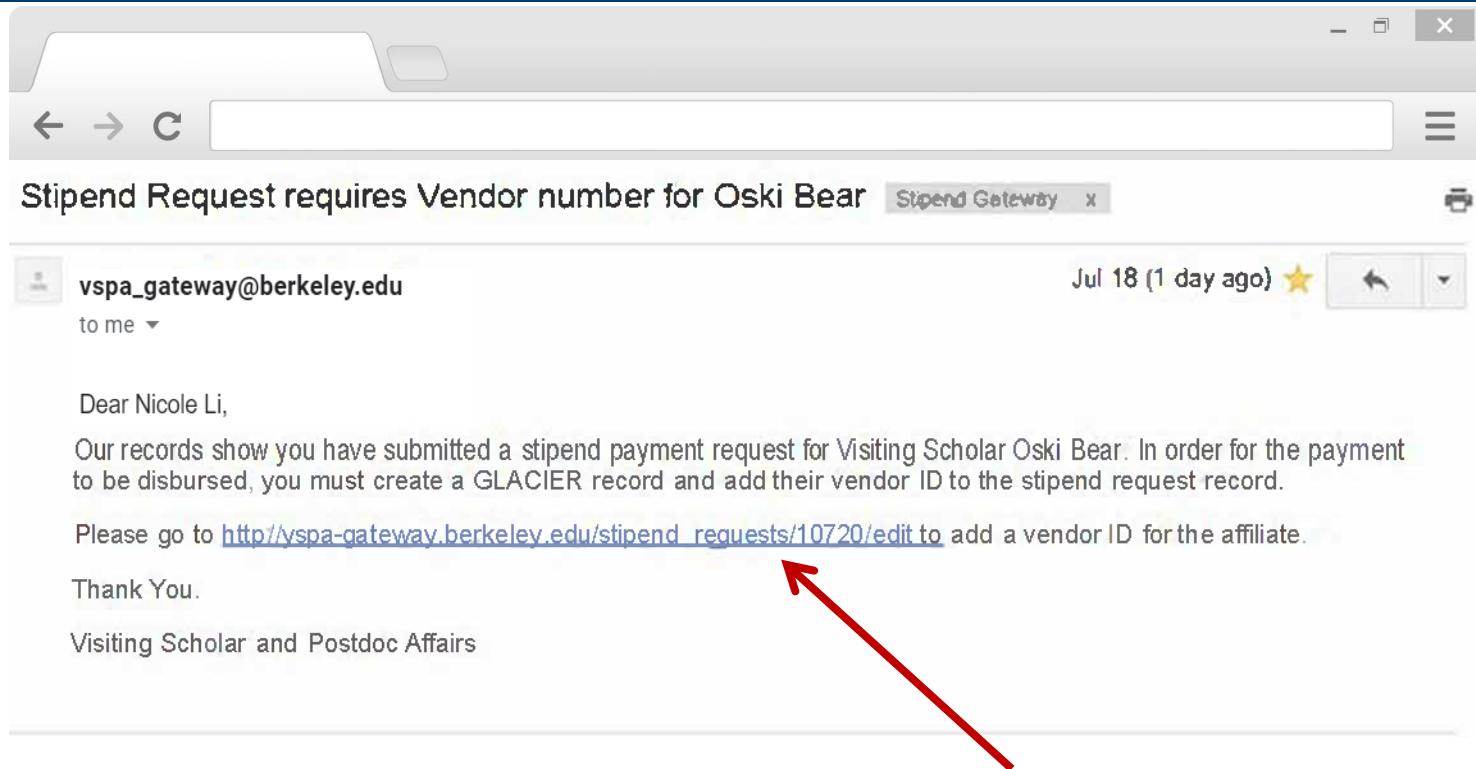
VSPA will be notified via email that a letter has been uploaded for review

Visiting Scholar/Student Researcher Stipend Disbursement Process



When the exception request to the \$20K limit has been approved, the **Disbursement Preparer** will receive the above email

Visiting Scholar/Student Researcher Stipend Disbursement Process



Within two weeks of the **Date to Start Payment**, if a **vendor number** has not been added to the record, an email reminder will be sent to the **Disbursement Preparer**

Click on the link in the email to add a **vendor ID**

Visiting Scholar/Student Researcher Stipend Disbursement Process

Visiting Scholar and Postdoc Affairs
University of California, Berkeley

Maria Lopez
Research Immediate Office

Stipend Request for Oski Bear

Preparer

I, as the preparer of the proposed stipend request, have confirmed authorization from the appropriate financial head of the department to submit this application. **True**

Stipend

Visitor Name: Oski Bear
Request Status: In-Progress
Disbursement Preparer Comments:

Include instructions for payment delivery here, e.g. Hold for Pickup, EFT has been set up. If payment is for a visit that has ended, include the payment date(s) here.

HCM ID: 71831
* Vendor Number:

US Citizen: False
Visa Type: J-1 Exchange Visitor (Scholar)

This field is populated from the visitor record in the Gateway. Please contact VSPA if this information is incorrect.

* Payment Frequency: Single Payment
* Purpose of Payment: Living Expenses
* Total Award: \$ 5000.0

If the stipend request is more than \$10,000, you can upload an exception letter after you submit this request.

Stipend Update Information

Creation Date: Aug. 5, 2016 18:11
Last Update Date: Aug. 8, 2016 15:16
Last Modified by: Haruna Amy Aridomi

Enter in the **Vendor Number**

Press **Save Changes**

Visiting Scholar/Student Researcher Stipend Disbursement Process



The screenshot shows a web browser window displaying the VSPA (Visiting Scholar and Postdoc Affairs) website. The header includes the VSPA logo and the text "Visiting Scholar and Postdoc Affairs" and "University of California, Berkeley". The main content area shows a message: "Stipend request updated." with a red arrow pointing to it. Below the message is a link: "Click here to get visiting scholar letter." The page also displays a sidebar with navigation options and a main content area with sections for "Control Data" and "Personal Data".

Nicole Li
Research Office

Show All Information for Visit of Oski Bear

Stipend request updated. ←

[Click here to get visiting scholar letter.](#)

Control Data

Visitor Type: Visiting Student Researcher

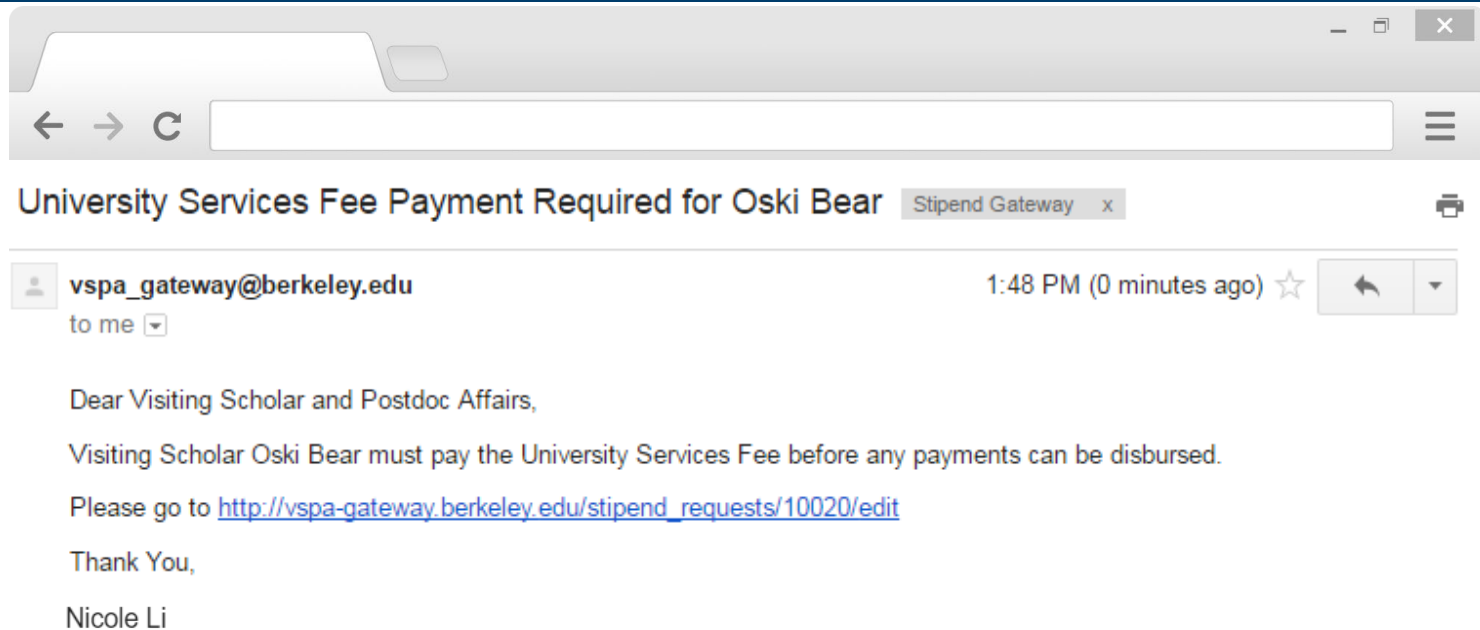
Personal Data

Family Name: Bear
First Name: Oski

VSPA Gateway
Visitors
Browse Lists
Invite VSR
Invite PD
Invite VS
Instructions
Users
Reports
Logout
VSPA Home Web Site

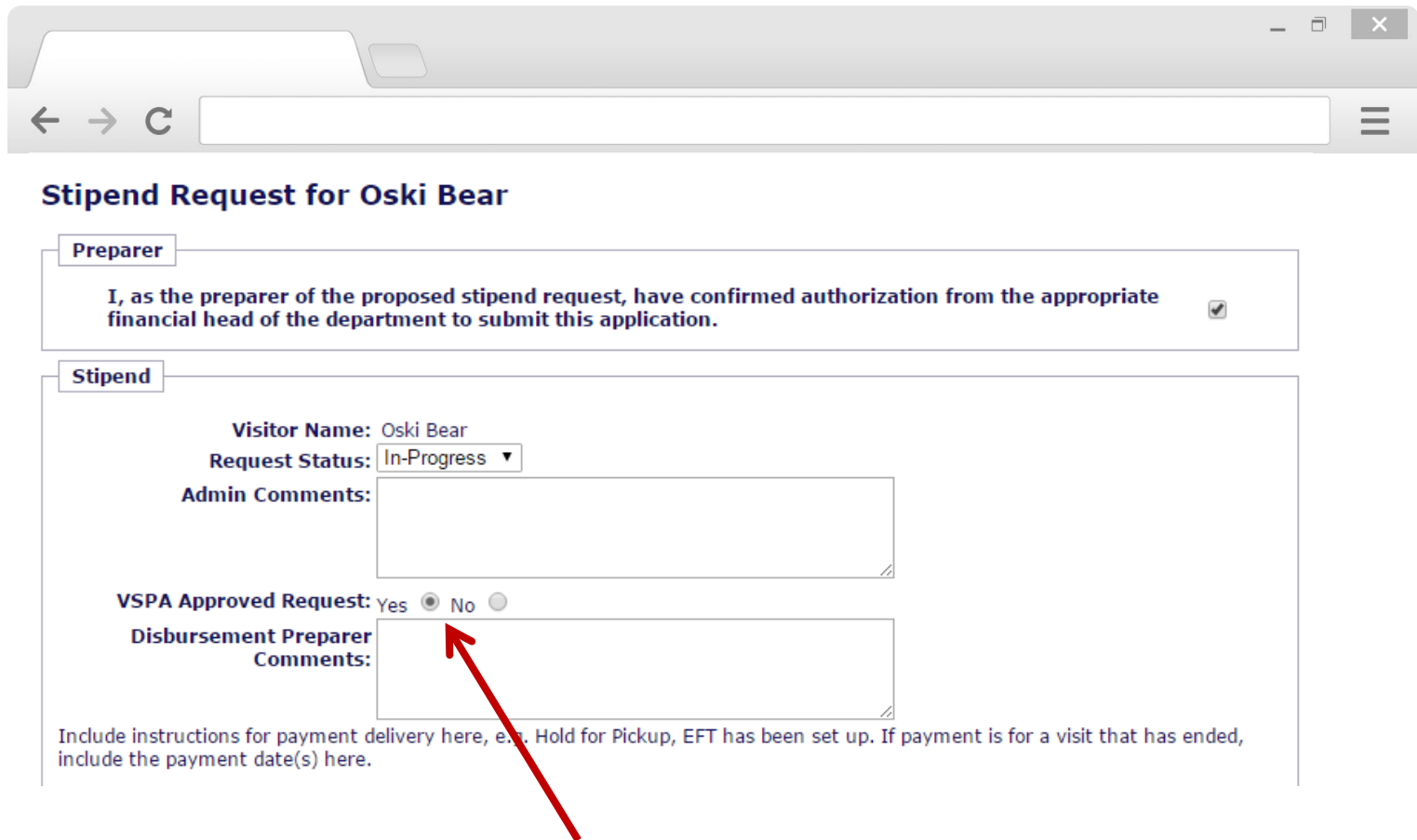
Instead of an email notification to the **Disbursement Preparer**, this on-screen message will appear

Visiting Scholar/Student Researcher Stipend Disbursement Process



VSPA will then verify that the **Vendor Number** has been added and the **University Services Fee** has been paid for the affiliate's appointment

Visiting Scholar/Student Researcher Stipend Disbursement Process



Stipend Request for Oski Bear

Preparer

I, as the preparer of the proposed stipend request, have confirmed authorization from the appropriate financial head of the department to submit this application.

Stipend

Visitor Name: Oski Bear
Request Status: In-Progress ▾
Admin Comments:

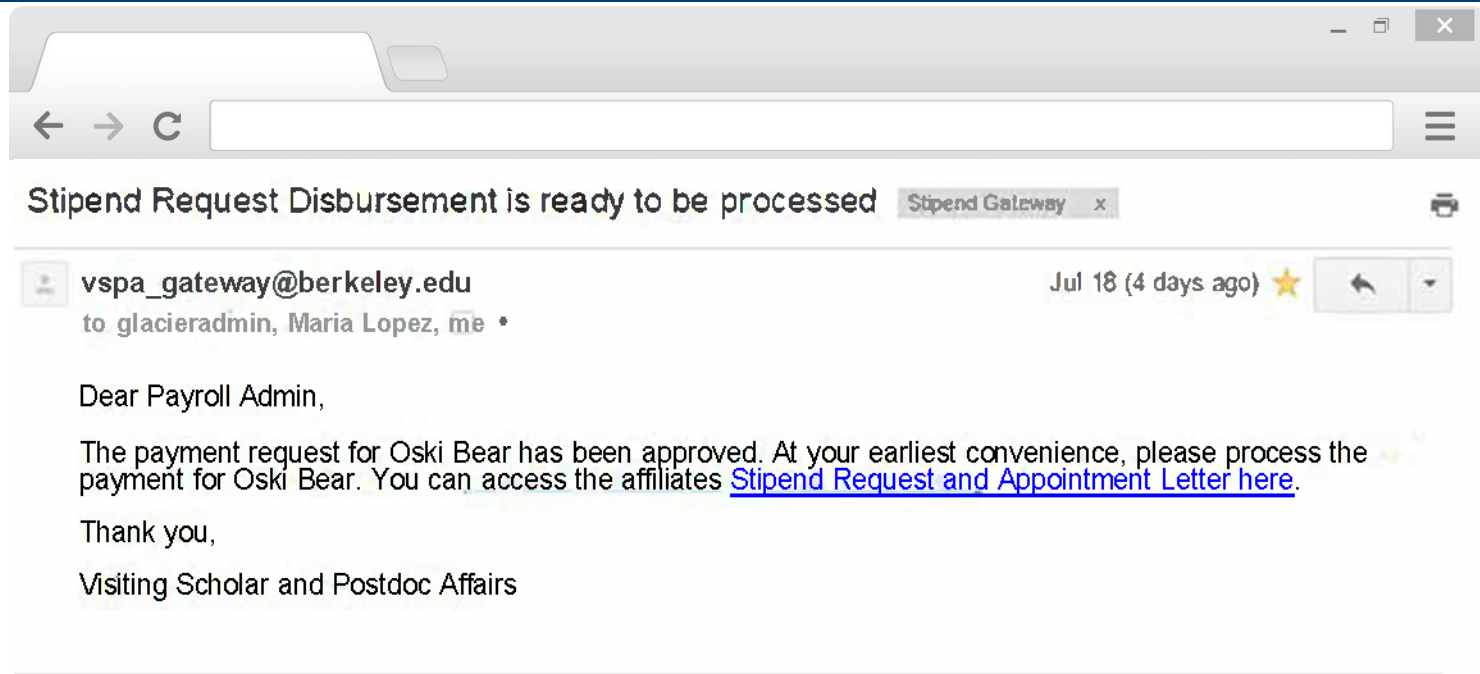
VSPA Approved Request: Yes No

Disbursement Preparer Comments:

Include instructions for payment delivery here, e.g. Hold for Pickup, EFT has been set up. If payment is for a visit that has ended, include the payment date(s) here.

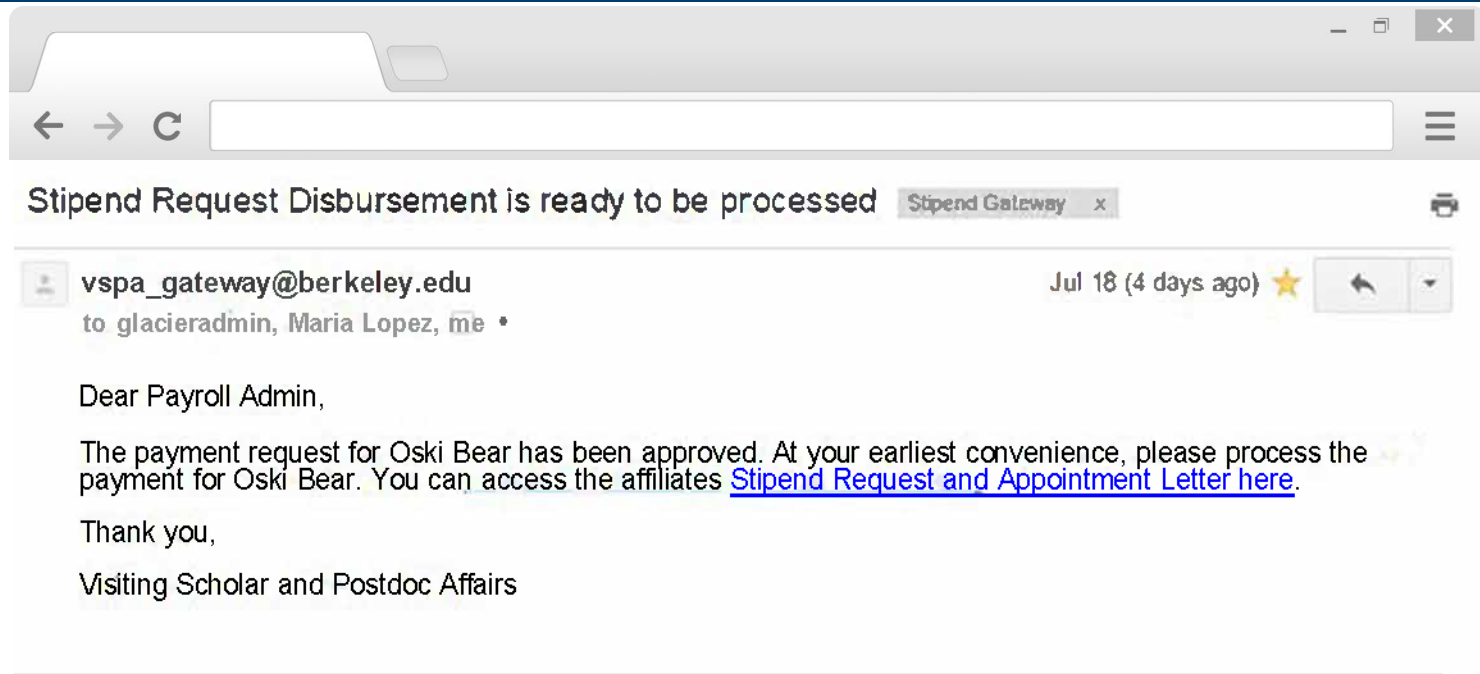
If all requirements have been met, the VSPA Program approves the stipend disbursement request

Visiting Scholar/Student Researcher Stipend Disbursement Process



The Payroll Office will receive an email to process the stipend disbursement request within two weeks of the **Date to Start Payment**

Visiting Scholar/Student Researcher Stipend Disbursement Process



The Payroll Office will receive the above email to process the stipend disbursement request within two weeks of the **Date to Start Payment**

The **Disbursement Preparer** and the **VSPA Office** will be copied on this email

VSPA Gateway Help Desk



HOURS Monday-Friday
9am to 4pm




CALL +1 (510) 643-9681



EMAIL vspa@berkeley.edu

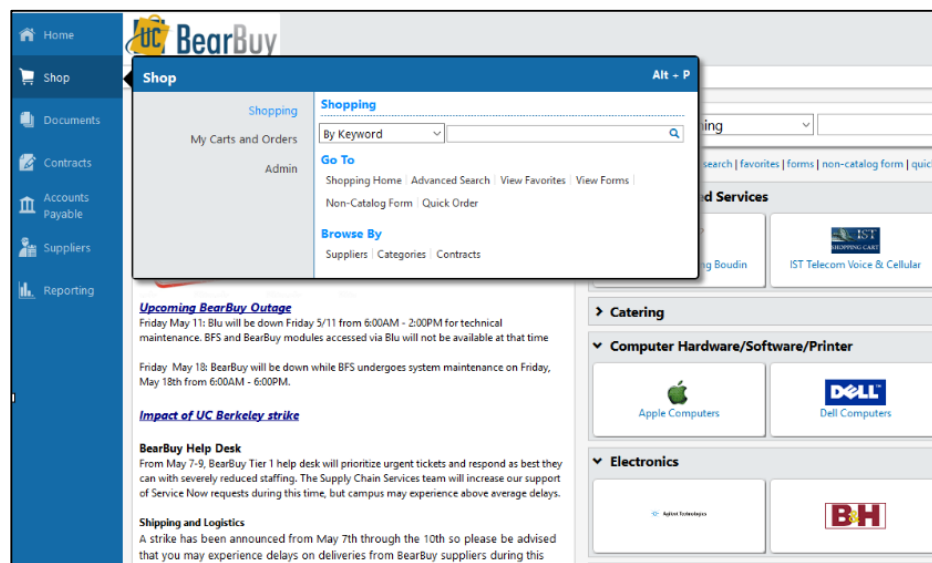




Using the Visiting Scholar Fellowship Recurring Payment Form

As of August 1st, 2018, all Visiting Scholar Stipend Payments, both recurring and one-time must now be submitted using the recurring payment form in BearBuy. For questions/help with the new process, please contact the Accounts Payable help desk at disburse@berkeley.edu and make sure to insert "VSPA Question" in the subject line.

To Begin:



- ▶ To begin, access the Recurring Payment form, log into BearBuy and use the sidebar to navigate to Shop>Shopping>View Forms; from that screen, select 'AP Access Only.'

To Begin:

The screenshot displays a software interface for managing Accounts Payable (AP) forms. On the left, a sidebar contains navigation options: 'Personal' (with a note 'You have no personal favorites.') and 'Shared'. Under 'Shared', 'AP Access Only' is highlighted. The main content area is titled 'AP Access Only' and includes a 'Folder Actions' dropdown. Below this, a table lists available forms. The 'Recurring Payments' form is highlighted, with a description: 'Use this form as an alternate to creating Amount Only or Payment Request Form for all types of recurring payments' and 'Accounts Payable form for recurring payments. Restricted to AP team or verified users.' To the right of this form, the amount '0.00 USD' is displayed, and a 'View Form' button is visible. A 'Copy' link is also present below the button. An 'Actions for Selected Favorites' dropdown is located above the table.

Form Name	Description	Amount	Actions
Recurring Payments	Use this form as an alternate to creating Amount Only or Payment Request Form for all types of recurring payments Accounts Payable form for recurring payments. Restricted to AP team or verified users.	0.00 USD	<input type="checkbox"/> View Form Copy

- ▶ Open the Recurring Payments form by clicking on the 'View Form' button on the right.


Section 1: Payee Information

Type of Activity	<input type="text" value="Please select..."/>
US Citizen / Permanent Resident *	<input type="text" value="Please select..."/>
If not US Citizen, enter the type of VISA	<input type="text"/>
<p>*If payee is not a US citizen or permanent resident, they will be required to complete a UCB Glacier Tax record before payment can be made. For Information regarding payments to foreign individuals & Glacier Form: Glacier Form <u>Please send the completed Glacier Information Form to glacieradmin@berkeley.edu</u></p>	
Enter Supplier	<input type="text"/>
	or Supplier Search
Expense Information	<input type="text"/>
	254 characters remaining expand clear
Location of Service or Research	<input type="text"/>
<p>If the location of research is outside of California and the person is a nonresident of California, please have the vendor complete a CA587 Form. If the location of research is outside of US and the person is a Foreign National, please have the vendor complete a UC W-8BEN Sections A, H, and I (required).</p>	
Total Award / Amount	<input type="text"/>

Section 1: Payee Information

1. Select Type of Activity
2. Select if UC Citizen or Permanent Resident (Yes or No).
3. If not a US Citizen then enter the type of Visa. If payee is not a US citizen or permanent resident, they will be required to complete a UCB Glacier Tax record before payment can be made. Glacier Form. Please send the completed Glacier information form to glacieradmin@berkeley.edu.
4. Enter Supplier/Payee Name: Enter the name of the payee. If they are not in the system, you cannot move forward. Will need to fill out the UC Berkeley vendor form and then submit to vendor and have that payee set up as a vendor.
5. Expense Information: Enter a description of what the payment is for. If for a Visiting Scholar fellowship payment then enter that into this field.
6. Location of Service or Research: If in California, list the city name (i.e., Berkeley). If outside of California, list the city and State or Country.
7. Total Award/Amount: Enter the total amount of payments to a single chartstring. If payments need to be made to multiple chartstrings, upon completion of this process, an additional form will be required.

Section 2: Payment Information

Payment Information ?		
Frequency of Payment Please select... ▼	Start Date <input type="text"/>  mm/dd/yyyy	# of Payments <input type="text"/>
If the frequency is 'Monthly' provide the 'Start Date' and '# of Payments'.		
If the frequency is 'Other', provide the Payment Date(s) (mm/dd/yyyy) and Payment amount (\$1000000.00)		
Comments <input type="text"/>		
250 characters remaining expand clear		

Section 2: Payment Information

8. Frequency of Payment: Select whether the frequency of payment is monthly or “other”. Other would also be selected for a one-time payment. If selecting “other”, then provide additional information below in the comments field.
9. Start Date: For recurring payments, enter the date of the first payment, otherwise leave blank
10. # of Payments: For recurring payments, enter the total # of payments to be made
11. Comments field: This is a required field. If none of the conditions here apply, simply type “None”. If the payment frequency is other than monthly, then enter the frequency (i.e. weekly). If there is a one-time payment, then enter the required payment date and amount. If the check should be held for pickup, enter phone # and name of individual (must be either UC Berkeley employee or the payee) to be contacted.

Section 3: Attachments

12. Attachments: Click on the Add Attachments button and select/locate the completed Stipend Request form from the VSPA portal and attach.

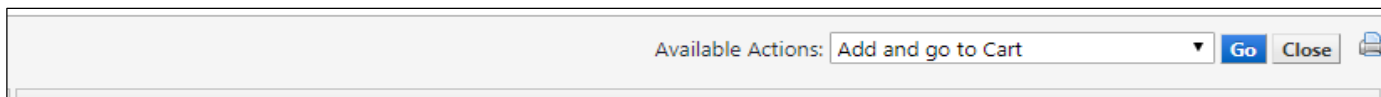
Attachments ?

Privacy Warning: Do not upload any document in BearBuy, or any other website application, *unless* the notice triggering data and the home & family data is blacked out and **completely unreadable**. The best approach is to remove this data from the document before uploading it. [\[Data Privacy\]](#)

Internal Attachments [Privacy Warning]

Section 3: Attachments

13. At the top of the screen, make sure “Add and go to Cart” is in the Available Action window and select “Go”.



14. This will close the window and take you back to BearBuy where you will see your Shopping Cart.

Section 3: Attachments

15. Click on “View Cart Details.”

Shopping Cart for Dan Parnas

1 Item(s) for a total of **6,200.00** USD

[View Cart Details](#) or [Assign Cart](#)

Cart Name: 2018-03-19 012509487 02

Description: [Empty]

Priority: Normal

Prepared For: Dan Parnas

[Supplier / Line Item Details](#)

Contract: no value

PO Number: To Be Assigned

Account Code: [Empty]

Pricing Code: [Empty]

Quote number: [Empty]

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Visiting Scholar Stipend			6,200.00	1	6,200.00 USD
Supplier subtotal					6,200.00 USD
Shipping, Handling, and Tax charges are calculated and charged by each supplier.					
Subtotal					6,200.00
Shipping					0.00
Handling					0.00
Total					6,200.00 USD

[View Cart Details](#) or [Assign Cart](#)

[view cart history](#)

Section 3: Attachments

16. Click on 'Edit' in the Org Node field; enter Org Node OAVCR and hit 'save.' This automatically routes your cart to the Visiting Scholars Program for approval.

⚠ You need to be aware of the following issue(s), but it will not prevent you from submitting your request.

- Empty field: Account
- Empty field: Department
- Empty field: Fund

Requisition | PR Approvals | PO Line Preview | Comments | Attachments | History

Summary | Shipping | Billing | Asset Management | Accounting Codes | Supplier Info | Taxes/S&H

Org Node		Shipping	
Org Node	edit	Ship To	edit
OAVCR		<i>no address</i>	
Research Immediate Office		Final Destination Code	<i>no value</i> edit
General		Delivery Options	
Cart Name	2018-05-08 011889879 01 edit	Expedite	x
Description	<i>no value</i>	Ship Via	Best Carrier-Special, See Comments
Dept Ref No.	<i>no value</i>	Requested Delivery	<i>no value</i>
Priority	Normal		
Assigned to	Jeffrey Kent		View/edit by line item...
Prepared For	Jeffrey Kent		

Section 3: Attachments

17. Click on Final Review on the top right hand of the screen and it will instruct you to enter the chartstring that the Visiting Scholar Stipend is funded by, which you will find on the VSPA Stipend Request Form. Enter all chartfields listed on the VSPA form under Payment Schedule. The chartfields highlighted below are the minimum requirement, but if there is a CF1 and /or CF2 be sure to enter those as well and “Save”.

Accounting Codes								?
Account	Speedtype	Fund	Federal Funds	Department	Program Code	Chartfield1	Chartfield2	edit
<i>no value</i> ⚠ Empty field ✎	none	<i>no value</i> ⚠ Empty field ✎	<i>no value</i>	<i>no value</i> ⚠ Empty field ✎	<i>no value</i>	<i>no value</i>	<i>no value</i>	

[View/edit by line item...](#)

Section 3: Attachments

18. Click on the Submit button on the top right hand part of the screen.



19. The cart will be sent to a requisition creator in CSS.
- i. CSS will create the requisition
 - ii. Then it will be sent back to the Visiting Scholars Program for Org Node Approval
 - iii. Once the requisition is approved, the individual that submitted the requisition will receive an e-mail notification that a PO has been generated
 - iv. Additionally, a notification will be sent to Accounts Payable to create both the recurring vouchers and any one-time vouchers specified.
 - v. Vouchers will be visible in BearBuy by inquiring on the PO # provided, with the scheduled payment dates.
 - vi. If changes are necessary to one or more scheduled payments, including a cancellation of a specific payment, e-mail disburse@berkeley.edu with your request and be sure to place "URGENT" in the subject line if the payment is scheduled in less than 5 business days.

20. If the shopper is an experienced BearBuy user that is familiar with the process for adding additional lines and/or chartstrings to an existing cart, then they should follow those same steps to add lines and/or chartstrings to this cart. For inexperienced BearBuy users, additional payments to be made to the same payee, using different chartstrings, repeat the steps here to create a new requisition for each chartstring.

Questions regarding this process? Please contact the Accounts Payable Help Desk at disburse@berkeley.edu

BEAR

HUG

