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Bursar's Third-Party Contract Process for Sponsored Student Tuition

I. PURPOSE

The third-party contract process, administered by the Bursar's Office and the Controller's Office, allows sponsored award funds to pay tuition and fee charges for students supported by those awards. Sponsored funds are applied as a first-dollar payment, ahead of financial aid, and the covered charges are removed from the standard billing and collections cycle. This prevents students from incurring late fees while grant funding is being applied.

II. SCOPE

This process covers charges that appear on the student bill: tuition, mandatory fees, and health insurance. It does not cover stipends or nonstandard costs such as residence hall charges. Stipends continue to be paid through the standard SDV process.

Requests are submitted through the WISER Tuition and Fees Contract form in Kuali Build. The Bursar's Office establishes one contract per award, which rolls over each semester the award is funded.

III. Acronyms and Definitions

Term	Definition
DRA	Departmental Research Administrator
FRA	Financial Research Administrator (ORSP Post-Award)
SDV	Student Disbursement Voucher
First dollar	Payment applied to student charges before any financial aid is considered
Third-party contract	The Bursar's Office mechanism that bills a sponsor rather than the student

IV. Related Resources

[ORSP Forms, Policies, & Processes]

- Student Payments section of Award Management
  - Sponsored Student Payments Policy & Procedures

[Student Payment Information] — UMB Bursar's Office

Kuali Build Guide (Kuali Build section) — general use and navigation
Team Assignments — ORSP About Us

V. Roles and Responsibilities

Role	Responsibility
DRA or Department Grant Administrator	Initiates the WISER Tuition and Fees Contract form for each new award, using coverage consistent with the award budget justification.
Principal Investigator	Approves the form when a department administrator submits it. Provides the list of students to the Bursar's Office by the semester deadline. Communicates with students if payment is delayed.
DRA Lead	First-level approval of the submitted form.
ORSP Post-Award (FRA)	Validates the request against the award and pre-approves the resulting journal entry.
ORSP Post-Award (Mgmt)	Validates award roll-over to upcoming semesters and provides final budget approval of the journal entry in PeopleSoft.
Bursar's Office	Establishes the third-party contract, flags student accounts, and receives semester student lists at tpc@umb.edu.
Controller's Office	Processes the journal entry charging the award after the add/drop period.

VI. Semester Deadlines

The Bursar's Office observes the following deadlines so that student bills are handled correctly. Contracts must be established before student lists can be accepted.

Semester	Contract set up by	Student list submitted by
Fall	July 3	August 15
Spring	December 5	January 15
Summer	May 1	May 19

VII. Procedure

1. Submit the contract form

The DRA or department grant administrator submits the WISER Tuition and Fees Contract form in Kuali Build for each new award. The submission is normally one-time: the Bursar's Office sets the contract up once and it rolls over each semester the award is funded. A new form is required when future funding is not guaranteed, funding chartfields change, or when different groups of students receive different levels of support.

2. Approval routing

Routing depends on who initiates the form:

- **PI submits:** the form routes to the DRA Lead, then to the Post-Award FRA, then to the Bursar's Office.
- **Department administrator submits:** the form routes first to the PI for approval, with confirmation returned to the submitter, then follows the same path — DRA Lead, FRA, Bursar's Office.

An approval notice is sent to everyone in the workflow, and the approved form is delivered to the Bursar's Office at tpc@umb.edu. The Bursar's Office is included in the workflow automatically and will respond directly.

3. ORSP validation

Before approving, ORSP confirms that:

- The sponsored project number and speed type match the award.
- The requested coverage is consistent with the award budget justification.
- The charges fall within the period of performance.
- The request does not exceed the maximum contract amount.

If a budget justification is not on file, the department may be asked to provide one.

4. Bursar setup and student list

The Bursar's Office establishes the contract and places a flag on each student's account. The flag pulls the covered charges into the third-party system and places a placeholder on the account so the student is not billed for the covered amount. The PI submits the list of participating students by the semester deadline.

5. Charging the award

After the add/drop period, the Controller's Office processes a journal entry charging the award. The entry routes to the ORSP Post-Award team for a final budget check and approval in PeopleSoft.

VIII. Completing the Form

The form captures the information the Bursar's Office needs to build the contract and the information ORSP needs to validate it.

Field	Entry
Initiator and start semester	The initiator is captured automatically. Select the semester in which coverage begins.
Personnel	Select the DRA Lead and the Post-Award FRA for the relevant portfolio.

Field	Entry
Stipend component	Indicate whether the award includes stipends. Collected for reporting only; stipends are not covered by this process.
Kuali award number	The BK number for the award (for example, 01799-00001).
Sponsored project number / speed type	Must match the award.
Maximum per contract for this semester	Estimated semester amount. For a \$100,000 annual budget, enter \$50,000.
Maximum per student	The per-student cap for the semester. Enter 0 if there is no cap.
Third-party contract name	A unique name in the format tp-acronym-speedtype. This name is visible on the student's WISER account, so it also distinguishes multiple contracts on the same award.
Coverage details	Add one row for each covered item — tuition, mandatory fees, health insurance. For each, select the payment basis (a dollar Rate or a Percent) and enter the value.

IX. Determining Coverage Amounts

- Budget justifications generally state annual amounts. Because the form is per semester, divide the annual amount by two.
- When an award is already underway, set the cap at the remaining budget. If \$20,000 remains of a \$100,000 budget, the cap is \$20,000.
- Prorate awards with a shorter period of performance. An award ending September 30 within a fall semester that runs through December equates to roughly 25 percent of the semester amount.
- Covering a full semester when the award ends mid-semester requires written prior approval from the sponsor's program officer. An email is sufficient. Any expense extending past the award end date requires prior approval.
- Budget justifications rarely itemize partial semesters. Coverage of a semester fragment is typically funded from unspent budget or serves as a bridge into the next year of program funding.

X. Special Circumstances

Situation	How to handle it
Different cohorts receive different levels of support (for example, 100	Submit a separate form for each distinct scenario and use the contract name to distinguish them.

Situation	How to handle it
percent for one group and 75 percent for another)	
Student eligibility depends on criteria not known in advance, such as level of participation	Continue using the standard SDV process for those students.
Future funding is not guaranteed	Submit a new form once the new year's funding is received rather than establishing the contract on an at-risk basis.
The submission does not align precisely with the budget justification	The Bursar's Office can generally still work with it. ORSP may request the budget justification if one is not on file.
Payment processing is delayed	The PI should advise affected students to set up a payment plan to avoid late fees. The plan is cancelled or the payment refunded once the sponsored payment posts.
Payment is denied	Students are ultimately responsible for paying the balance of their student bill. The PI should advise the student that should the funding be denied, the student will need to set up a payment plan, if able, or make a payment. Should the payment be denied at the point of the journal entry posting, after add/drop, the Bursar will reverse the credit on the student account and rebill the new balance to the student.

XI. Guidance for Proposal Development

- State clearly in the budget justification which student costs are covered. Write “tuition and fees” rather than “tuition” when both are intended.
- Consider these downstream billing processes during proposal development, so that coverage is unambiguous and students are not exposed to late fees.
- DRAs should initiate the Kuali Build form for existing awards that belong in this process.

XII. Access and Support

Need	Contact
Questions about contracts or student lists	tpc@umb.edu (Bursar's Office)
Access to the WISER Tuition and Fees Contract form	Virginia.Maki@umb.edu (Virginia Maki, Assistant Director of ORSP, ERP Systems & Training)
Kuali award information appears out of date on the form	Virginia.Maki@umb.edu (Virginia Maki, Assistant Director of ORSP, ERP Systems & Training)

Need	Contact
Stipend payments	Standard SDV process; use the multi-SDV template for large volumes