

# Yale

## Graduate Student Funding

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# Graduate Student Funding Process

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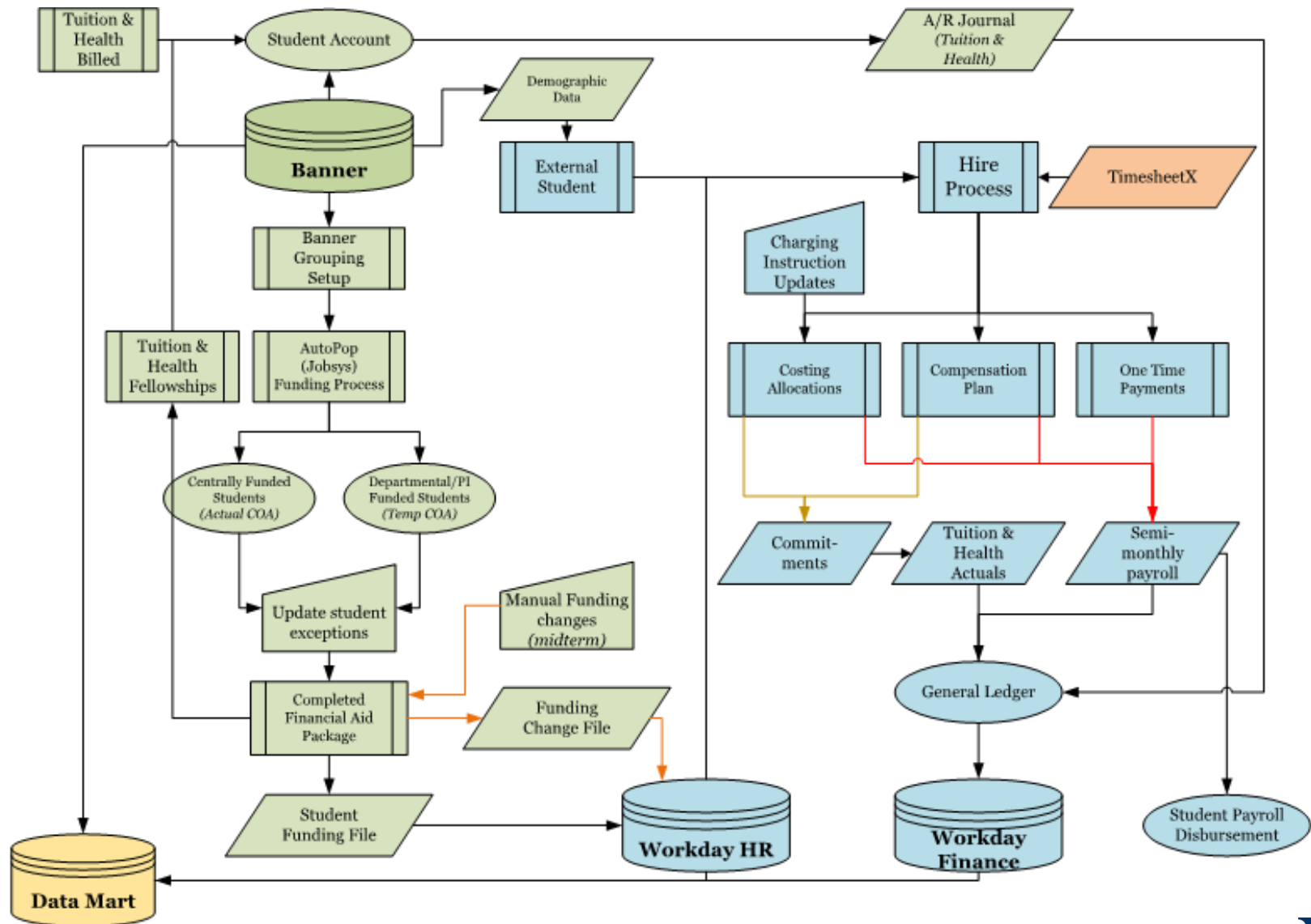
## Graduate Student Funding Process

### OVERVIEW

- In July 2022, a new **Graduate Student Funding (GSF) process** will replace the Graduate Student Payment System (GSPS).
- The new GSF process will use the Student ERP system (**Banner**), the HR and Finance ERP system (**Workday**) and a newly developed **data mart**, and **Power BI** to improve usability, enhance functionality and reporting, and streamline processes for faculty and staff supporting graduate funding.
- This guide walks you through the steps to complete the new GSF process.



# Graduate Student Funding Process



## HCM and Payroll

### New Functionality with GSF Implementation

- Semimonthly Student pay will now be managed by Compensation Plans and Costing Allocations in Workday
- Compensation Plans and Costing Allocation for the academic year will be sent from Banner to Workday in the middle of the month of July for the following September through August academic year.
- Hires happen in Workday once the Funding is completed in Banner
- Adjustments made in Banner and will be sent daily to Workday
- Onboarding tasks for Students may be completed once the hire is entered in Workday (e.g., I-9, Direct Deposit & W4)
- Benefits include:
  - Using standard Workday functionality to manage compensation and costing
  - Finance commitment functionality available for Graduate School Student payments including Tuition and Health
  - Consistent management of Student pay with Faculty and Staff for Business Offices

# Graduate Student Funding

## HCM Workday Roles

Access to all Graduate School Students will be managed in Workday using the following roles.

User Groups	Role Name	Enabled @
Registrars (all GS)	HCM Student View-Only w/Comp (new role)	Pay Group (S semimonthly)
Business Office staff (all GS)	HCM Student View-Only w/Comp (new role)	Pay Group (S semimonthly)
Business Office staff (Sup Org level)	HCM Student View-Only w/Comp (new role)	Supervisory Org
GSAS FAO	Graduate Student Partner (new role)	Pay Group (S Semimonthly)

Role Name	Description	Enabled @
<b>HCM Student View-Only w/comp (New Role)</b>	<ul style="list-style-type: none"> <li>This role allows view only access to HCM related Student Data include Job, Position, Organization, and Compensation</li> <li>Applies to current organization and all subordinates</li> <li>If you already have a Business Office role in specific Supervisory Orgs, you will not need this additional role</li> <li>If wanting access to all Graduate School Students, request access at Pay Group (S Semimonthly) only</li> <li>If wanting access to Graduate School Students only in one Department, request access to specific Supervisory Org</li> </ul>	Pay Group (S Semimonthly) Or Supervisory Org
<b>Business Partner</b>	<ul style="list-style-type: none"> <li>This role allows view only access to HCM related Student Data include Job, Position, Organization, and Compensation</li> <li>Applies to current organization and all subordinates</li> <li>Current Business Partner access allows view of Graduate School Students. No need to grant additional access</li> </ul>	Supervisory Org
<b>Strategic Business Partner</b>	<ul style="list-style-type: none"> <li>This role allows view only access to HCM related Student Data include Job, Position, Organization, and Compensation</li> <li>Applies to current organization and all subordinates.</li> <li>Current Business Partner access allows view of Graduate School Students. No need to grant additional access</li> </ul>	Supervisory Org

# Workday: Worker Profile - Job Tab

- To view Job Details info:

From Landing Page: Navigate to Student profile by typing name or Employee ID in search bar then click on Job tab

The screenshot displays the Workday interface for a worker profile. The top navigation bar includes the Yale logo, a search bar with 'test01', and notification icons. The left sidebar shows navigation options: Summary, Job (selected), Compensation, Pay, Contact, Personal, and Time Off. The main content area is divided into two sections: Job Details and Contact Information - Public.

**Job Details**

Employee ID	247872
Supervisory Organization	Yale University (Salovey, Peter) >> School of Architecture - Graduate Students (Berke, Deborah (Inherited))
Job	P307010 Graduate School Student
Business Title	Graduate School Student
Job Profile	Graduate School Student
Employee Type	Student
Time Type	Part time
FTE	0.00%
Location	Rudolph Hall
Hire Date	08/16/2021
Original Hire Date	08/16/2021
Continuous Service Date	08/16/2021
Length of Service	0 year(s), 6 month(s), 21 day(s)
Time in Position	0 year(s), 6 month(s), 21 day(s)
Time in Job Profile	0 year(s), 6 month(s), 21 day(s)

**Contact Information - Public**

Email: noemail@yale.edu

**Work Address**

180 York Street New Haven, CT 06511 United States of America

# Workday: Worker Profile - Organizations Tab

- View Organizations info:

From Landing Page: Navigate to Student profile by typing name, Employee ID, or NetID in search bar then click on Job then Org tab

- *Note:* Supervisory Org is determined by Student's Primary Home, Department/Major in Banner

The screenshot shows the Workday interface for a worker profile. The top navigation bar includes the Yale logo, a search bar with 'test01', and utility icons. The left sidebar contains navigation options: Summary, Job (selected), Compensation, Pay, Contact, Personal, and Time Off. The main content area is titled 'Test01, ARCH Graduate School Student' and features an 'Actions' button and 'Email' and 'Team' icons. The 'Organizations' tab is active, displaying a table of organizations. A toggle for 'Turn on the new tables view' is visible. The table lists 8 organizations with columns for Organization, Organization Type, and Organization Subtype.

Organization	Organization Type	Organization Subtype
Yale University	Company	Company
Yale University Institutions	Company Hierarchy	Company Grouping
CC1157 ARCSCH School of Architecture - All	Cost Center	Cost Center
HDCC1375 ARCSCH School of Architecture	Cost Center Hierarchy	Department
Student	Employee Type	Employee Type
LH-Rudolph Hall	Location Hierarchy	Building
S Semimonthly	Pay Group	Pay Group
School of Architecture - Graduate Students (Berke, Deborah (Inherited))	Supervisory	Yale



# Workday: Compensation Tab

- Compensation Plans and Costing Allocation for the academic year will be sent from Banner to Workday during the month of July for the following September through August academic year. See “View Compensation” as of date to view compensation for different Academic Terms on next slide.
- Academic Term Payment Periods Note: Compensation will display in each of these periods: 8/16 or 9/1 to 1/15; 1/16 to 5/31; 6/1 to 8/31
- From Landing Page: Navigate to Student profile by typing name, Employee ID, or NetID in search bar then click on Compensation tab
- Adjustments may be made GSF and will be sent overnight to Workday

The screenshot shows the Workday interface for a student profile named 'Test01, ARCH'. The left sidebar contains navigation options: Summary, Job, Compensation (selected), Pay, Contact, Personal, and Time Off. The main content area is titled 'Compensation' and includes tabs for 'Total Rewards', 'Pay Change History', and 'Other Compensation Details'. A search bar at the top contains 'test01'. Below the tabs, there is a 'Totals' section with a table showing 'Total Base Pay' as 0. The 'Compensation' section shows 'Company: Yale University' and 'Plan Assignments: 3 items'. The plan assignments table is as follows:

Effective Date	Plan Type	Compensation Plan	Assignment	End Date
01/16/2022	Allowance	Graduate Student Health	147.22 USD Semi-monthly: Individual Target	05/31/2022
01/16/2022	Allowance	Graduate Student Stipends	1,344.00 USD Semi-monthly: Individual Target	08/31/2022
01/16/2022	Allowance	Graduate Student Tuition	2,538.89 USD Semi-monthly: Individual Target	05/31/2022

# Workday: Compensation As of Date

- From Landing Page: Navigate to Student profile by typing name, Employee ID, or NetID in search bar then clicking on Actions then Compensation then View Compensation 9/1-1/15, 8/16-1/15, 1/16-5/31, 6/1-8/31
- Note: Use 10/1-10/15, 2/16-2/28, 5/16-5/31 to view one period payments

**Yale** | Search: test01

**View Compensation** | Test01, ARCH | P307010 Graduate School Student

View As Of: 09/01/2021 | Total Salary & Allowances: 0 | Total Base Pay: 0

**Supporting Information**

- Supervisory Organization: [School of Architecture - Graduate Students \(Berke, Deborah \(Inherited\)\)](#)
- Job Profile: Graduate School Student
- Time Type: Part time
- Scheduled Hours: 0
- FTE: 0.00%

**Plan Assignments**

3 items

Effective Date	Plan Type	Compensation Plan	Assignment	End Date
09/01/2021	Allowance	Graduate Student Health	147.22 USD Semi-monthly: Individual Target	01/15/2022
09/01/2021	Allowance	Graduate Student Tuition	2,538.89 USD Semi-monthly: Individual Target	05/31/2022
08/16/2021	Allowance	Graduate Student Stipends	1,344.00 USD Semi-monthly: Individual Target	01/15/2022

Turn on the new tables view:

**Inset Navigation:** Test02, Arch Graduate School Student > Actions > Compensation > View Compensation

# Workday: Compensation History

- From Landing Page: Navigate to Student profile by typing name, Employee ID, or NetID in search bar then clicking on Actions then Compensation then View Compensation History 8/16-1/15, 9/1-1/15, 1/16-5/31, 6/1-8/31

Implementation - yale7

Yale

Compensation History Test09, GHSS

Turn off the new tables view

Compensation Events 7 items

Effective Date	Business Process	Status	Job	Reason	Compensation Changes				
					Type	Name	Current	Proposed	Actual End Date
06/01/2022	Ad-hoc Compensation Change	Successfully Completed	P307335 Graduate School Student	Request Compensation Change > Request Compensation Change > Graduate Student Compensation	Allowance	Graduate Student Stipends		1,344.00 USD Semi-monthly: Individual Target	08/31/2022
01/16/2022	Ad-hoc Compensation Change	Successfully Completed	P307335 Graduate School Student	Request Compensation Change > Request Compensation Change > Graduate Student Compensation	Allowance	Graduate Student Health		147.22 USD Semi-monthly: Individual Target	05/31/2022
01/16/2022	Ad-hoc Compensation Change	Successfully Completed	P307335 Graduate School Student	Request Compensation Change > Request Compensation Change > Graduate Student Compensation	Allowance	Graduate Student Tuition		2,538.89 USD Semi-monthly: Individual Target	05/31/2022
01/16/2022	Ad-hoc Compensation Change	Successfully Completed	P307335 Graduate School Student	Request Compensation Change > Request Compensation Change > Graduate Student Compensation	Allowance	Graduate Student Stipends		1,344.00 USD Semi-monthly: Individual Target	05/31/2022
09/01/2021	Ad-hoc Compensation Change	Successfully Completed	P307335 Graduate School Student	Request Compensation Change > Request Compensation Change > Graduate Student Compensation	Allowance	Graduate Student Tuition		2,538.89 USD Semi-monthly: Individual Target	01/15/2022
09/01/2021	Ad-hoc Compensation Change	Successfully Completed	P307335 Graduate School Student	Request Compensation Change > Request Compensation Change > Graduate Student Compensation	Allowance	Graduate Student Health		147.22 USD Semi-monthly: Individual Target	01/15/2022
08/16/2021	Ad-hoc Compensation Change	Successfully Completed	P307335 Graduate School Student	Request Compensation Change > Request Compensation Change > Graduate Student Compensation	Allowance	Graduate Student Stipends		1,344.00 USD Semi-monthly: Individual Target	01/15/2022

# Yale

## Graduate Student Funding

### FINANCE WORKDAY:

- [Roles](#)
- [Student Funding — New Student Hire](#)
- [View Compensation Details](#)
- [Verify Compensation](#)



## Finance Workday Roles

User Groups	Role Name	Enabled @
<b>Registrars</b>	GSF Payroll Costing Specialist - new role	Pay Group (S semimonthly)
	GSF DM Access	CC/CCH
<b>Business Office staff</b>	Cost Center Payroll Accounting Adjustment Specialist	CC/CCH
	Cost Center Payroll Costing Specialist	CC/CCH
	GSF DM Access	CC/CCH
<b>GSAS FAO</b>	GSF Payroll Costing Specialist	Pay Group (S Semimonthly)
	yes Cost Center Payroll Accounting Adjustment Specialist Student and Casual	Company (CO01)
	ysec Student PAA Inquiry	Pay Group (S Semimonthly)
	GSF DM Access	CC/CCH
	Role Steward-GSF DM Access	CC/CCH

# Graduate Student Funding

## Finance Workday Roles

Role Name	Description	Enabled @
<b>GSF Payroll Costing Specialist</b> (new role)	This role performs assignment of costing allocations to students paid Semimonthly. Applies to current organization and all subordinates. Since Grad school students are paid "Semimonthly", this role gives access only to grad school students.	Pay Group (S Semimonthly)
<b>Cost Center Payroll Accounting Adjustment Specialist</b>	This role initiates PAAs for assigned organizations. Applies to current organization and all subordinates. Includes Staff, Other Academic, Staff Fixed Duration, Intern, Faculty, Associate, Students and Casuals.	CC/CCH
<b>Cost Center Payroll Costing Specialist</b>	This role performs assignment of costing allocations. Applies to current organization and unassigned subordinates. Includes Staff, Other Academic, Staff Fixed Duration, Intern, Faculty, Associate, Students and Casuals.	CC/CCH
<b>Cost Center Payroll Accounting Adjustment Specialist Student and Casual</b>	This role initiates PAAs for students and other temporary/casual employees. Students can work multiple jobs across multiple cost centers which makes it difficult to manage payroll accounting adjustments.	Company (CO01)
<b>GSF DM Access</b> (new role)	This role manages access to GSF DataMart. Based on the cost centers assigned, the users can view the home department's students' financial transactions funded by any cost center as well as view other department's students' financial transactions funded by home cost center in GSF DataMart. This role is managed by Workday.	CC/CCH
<b>Role Steward-GSF DM Access</b> (new role)	This role approves requests for access to GSF DM, as a part of the Assign Roles BP in Workday. GSAS FAO are Role stewards for the new GSF DM access role. This role is managed by Workday.	CC/CCH
<b>ysec Student PAA Inquiry</b>	Allows inquiry to students' payroll accounting adjustments via pay group semi-monthly	Pay Group (S Semimonthly)

# Workday: Pay => Costing Allocations

- From Landing Page: Navigate to Student profile by typing name or Employee ID in search bar then clicking on Pay tab then click on Costing Allocations
- Costing may be entered for any of these periods 8/16-1/15, 9/1-1/15, 1/16-5/31, 6/1-8/31

The screenshot shows the Workday interface for a Graduate School Student profile. The search bar at the top contains 'Test01, APPLIEDPHYS'. The navigation menu on the left includes 'Pay' and 'Costing Allocations'. The 'Costing Allocations' tab is highlighted in yellow, with a red arrow pointing to it and a callout box that says 'Confirm Costing Allocations were loaded based on I-3343 Integreition'. The main content area displays a table titled 'Worker + Position + Earning' with the following data:

Start Date	End Date	Costing Allocation Level	Position	Earning	Costing Company	Costing (As of Start Date)	Distribution Percent
06/01/2022	08/31/2022	Worker Position Earning	P307004 Graduate School Student - Test01, APPLIEDPHYS	Graduate Student Stipends	Yale University	Cost Center: CC0574 GRASCH Financial Aid Fund: FD30 GA Fund Program: P600020 Scholarships and Student Aid (14) Project: PJ028935 GSAS Applied Physics UF Yale Designated: YD000002 General Appropriations	100.00%
01/16/2022	05/31/2022	Worker Position Earning	P307004 Graduate School Student - Test01, APPLIEDPHYS	Graduate Student Stipends	Yale University	Cost Center: CC0574 GRASCH Financial Aid Fund: FD30 GA Fund Program: P600020 Scholarships and Student Aid (14) Project: PJ028935 GSAS Applied Physics UF Yale Designated: YD000002 General Appropriations	100.00%
01/16/2022	05/31/2022	Worker Position Earning	P307004 Graduate School Student - Test01, APPLIEDPHYS	(Memo) Graduate Student Tuition	Yale University	Cost Center: CC0574 GRASCH Financial Aid Fund: FD30 GA Fund Program: P600020 Scholarships and Student Aid (14) Project: PJ028935 GSAS Applied Physics UF Yale Designated: YD000002 General Appropriations	100.00%
01/16/2022	05/31/2022	Worker Position Earning	P307004 Graduate School Student - Test01, APPLIEDPHYS	(Memo) Graduate Student Health	Yale University	Cost Center: CC0574 GRASCH Financial Aid Fund: FD30 GA Fund Program: P600020 Scholarships and Student Aid (14) Project: PJ102344 GSAS Health Fellowship Yale Designated: YD000002 General Appropriations	100.00%

At the bottom left, a yellow button labeled 'View All Costing Allocations' is highlighted with a red arrow and a callout box that says 'Select to view all prior period costing allocations'.

# Payroll Costing – Costing Allocation Information

- Costing allocation start and end dates cannot overlap past or future instructions
- Workday displays new or copied allocations first
- Attachments are not copied
- The sum of all costing allocations entered for a single time-period must equal 100%
- Costing allocations related to payrolls that have already processed cannot be changed and will require a payroll accounting adjustment (PAA)
- Commitments/obligations adjustments are run daily, Monday through Friday at 11:30AM

For help contact the Finance Support Center at 432-5394 or [sharedservices@yale.edu](mailto:sharedservices@yale.edu).



# Workday: Pay => Updating Cost Allocations

- From Landing Page: Navigate to Student profile by typing name, Employee ID, or NetID in search bar then clicking on Pay then Costing Allocations tab then click on Maintain
- To update cost allocations, complete the following fields
  - Select “Earnings for Worker’s Compensation Plans” to bring up a list of relevant plans
  - To refine your query results, enter applicable dates

### Assign Costing Allocation

---

#### Include Existing Allocations

From

To

#### Worker Costing

Worker \*

Position \*

Earning

#### Position Restrictions Costing

Effective Date

Position Restrictions (empty)

The screenshot shows the Workday interface for a student profile. The left sidebar has a red arrow pointing to the 'Pay' tab. The main content area shows a 'Maintain' button with a red arrow pointing to it. Below it is a table titled 'Current and Future Costing Allocations - 4 items'.

Start Date	End Date	Costing Allocation Level
06/01/2022	08/31/2022	Worker Position Earning
01/16/2022	05/31/2022	Worker Position Earning
01/16/2022	05/31/2022	Worker Position Earning

The 'Assign Costing Allocation' dialog box is overlaid on the right side of the screen, containing the same fields as the left image. The 'Earning' field is highlighted in yellow.

# Costing Allocations

- Multiple lines can be added to the same date range to split up the funding between multiple COA's
- Distribution percentages can be input up to two decimal places

Copy Costing Allocation

Start Date: 06/01/2022

End Date: 08/31/2022

Default Organizational Assignments (As of Start Date)

Cost Center: CC1337 NURADM Nursing-All School

> Costing Allocation Attachments

2 items

Order	Default (As of Start Date)	Required with no Default (Must have Costing Override)	Grant	GR	Yale Designated	*Program	*Project	Assignee	*Additional Worktags	* Distribution Percent
1					x YD000002 General Appropriations	x P000020 Scholarships and Student Aid (14)	x PJ028641 OSAS Engineering UF	Search	x Fund FD00 GA Fund	88
2			x GR114679 NSF Graduate Research Fellowship Program (BRFF - 2021)			x P000032 Research (21)	x PJ000001 General Project	x AHODAN di Bonaventura, Allegra	x Fund FD02 Grants and Contracts - Federal	12
										100.00%

# Costing Allocations

- If the funding is not the same for the entire term you can add another bucket of dates
- Your second bucket cannot conflict with dates from the original
  - One block of funding needs to end before another can start

Start Date: 06/18/2022

End Date: 06/30/2022

Costing Allocation Attachments

2 items

Default Organizational Assignments (As of Start Date)

Cost Center: CC1337 NURADM Nursing-All School

Order	Default (As of Start Date)	Required with no Default (Must have Costing Override)	Grant	Gift	Yale Designated	*Cost Center	*Program	*Project	Assignee	*Additional Worktags	* Distribution Percent
1					YD000002 General Appropriations	CC0574 GRASCH Financial Aid	P000020 Scholarships and Student Aid (14)	PJ02841 OSAS Engineering UP		Fund: F000 OA Fund	88
2			GR114673 NSF Graduate Research Fellowship Program (SMFP - 2021)			CC0574 GRASCH Financial Aid	P000032 Research (21)	PJ000001 General Project	AHOSAN d Bonaventura, Allegra	Fund: F002 Grants and Contracts - Federal	12
											100.00%

Remove

---

Copy Costing Allocation

Start Date: 07/01/2022

End Date: 08/31/2022

Costing Allocation Attachments

1 item

Default Organizational Assignments (As of Start Date)

Cost Center: CC1337 NURADM Nursing-All School

Order	Default (As of Start Date)	Required with no Default (Must have Costing Override)	Grant	Gift	Yale Designated	*Cost Center	*Program	*Project	Assignee	*Additional Worktags	* Distribution Percent
1					YD000002 General Appropriations	CC0574 GRASCH Financial Aid	P000020 Scholarships and Student Aid (14)	PJ02841 OSAS Engineering UP	Search	Fund: F000 OA Fund	100
											100.00%

Remove

Add

- 19 -

# Workday: Pay => Updating Cost Allocations (cont.)

If filled in incorrectly, you will receive one or more error notifications.

The screenshot displays the Workday Payroll Costing interface. At the top, there is a section for "Copy Costing Allocation" with a checkbox. Below it, the "Start Date" is set to 01/16/2022 and the "End Date" is set to 05/31/2022. A red error message states: "Error: Costing Allocation Interval date ranges must not overlap. The date range submitted conflicts with another proposed Costing Allocation Interval." Below this, there is a section for "Costing Allocation Attachments" with a table of 1 item.

Order	Default (As of Start Date)	Required with no Default (Must have Costing Override)	Grant	Gift	Yale Designated	*Cost Center	*Program	*Project	Assignee	*Additional Worktags	* Distribution Percent
					X YD000002 General Appropriations	X C00574 GRASCH Financial Aid	X PG00020 Scholarships and Student Aid (14)	X PJ028635 GSAS Applied Physics UF		X Fund: FD30 GA Fund	100

An "Errors" dialog box is open in the center, listing two errors:

- Start Date**  
Costing Allocation Interval date ranges must not overlap. The date range submitted conflicts with another proposed Costing Allocation Interval.
- Start Date**  
Costing Allocation Interval date ranges must not overlap. The date range submitted conflicts with another proposed Costing Allocation Interval.

At the bottom right, a "Payroll Costing – Costing Allocation Information" dialog box provides the following instructions:

- Costing allocation start and end dates cannot overlap past or future instructions
- Workday displays new or copied allocations first
- Attachments are not copied
- The sum of all costing allocations entered for a single time-period must equal 100%
- Costing allocations related to payrolls that have already processed cannot be changed and will require a payroll accounting adjustment (PAA)
- Commitments/obligations adjustments are run daily, Monday through Friday at 11:30AM

The interface includes buttons for "Remove", "Add", "Submit", "Save for Later", and "Cancel". The Yale logo is visible in the bottom right corner.



# Workday: Pay => Updating Cost Allocations (cont.)

Confirm the cost allocation was updated.

Worker Test01, APPLIEDPHYS  
Position P307004 Graduate School Student - Test01, APPLIEDPHYS  
Earning Graduate Student Stipends

**Include Existing Allocations**  
From 03/15/2022 To (empty)

Copy Costing Allocation

Start Date \* 04/01/2022   
End Date 05/31/2022 

> Costing Allocation Attachments

1 item

Default Organizational Assignments (As of Start Date)  
Cost Center: CC0559 FASHOA History of Art

Updated Program from PG00020 to PG00030

Order	Default (As of Start Date)	Required with no Default (Must have Costing Override)	Grant	Gift	Yale Designated	*Cost Center	*Program	*Project	Assignee	*Additional Worktags	* Distribution Percent
					x YD000002 General Appropriations	x CC0574 GRASCH Financial Aid	x PG00030 Education Support - Leadership and Administration (12)	x PU028635 GSAS Applied Physics UF		x Fund: FD30 GA Fund	100

100.00%

# Sample Costing Allocation Updated Notification

- After updating department defaulted Costing Allocation in Workday and a subsequent change is made in Banner that overwrites this, the Cost Center Payroll Costing Specialist (CCPCS) role holders will receive a notification indicating there was a Costing Allocation updated for the student
- You can drill through to the Notification Topic to view details about what Costing was updated (from and to values)

The screenshot displays the Yale notification system interface. At the top, the Yale logo is on the left, a search bar is in the center, and utility icons (grid, chat, notifications with a '2' badge, mail with a '271' badge, and weather) are on the right. A red arrow points to the notification bell icon. Below the header is a blue 'Notifications' bar. On the left, there are filters for 'Viewing: All' and 'Sort By: Newest' (From Last 30 Days). Two notification items are listed: 'Graduate School Student Assign Costing Allocation Loaded' (22 minute(s) ago) and another identical item (20 hour(s) ago). The main area shows 'Alert Notification Details' for the first item, including creation time (05/25/2022 07:39:18.197 AM), recipient, subject, and body text. The body text asks for a review and lists three costing allocation entries. The 'Notification Topic' section lists three entries with their respective student names and department details.

**Alert Notification Details**

22 minute(s) ago

**Alert Notification** [Notify](#) of Graduate School Student Assign Costing Allocation Loaded

**Creation Time** 05/25/2022 07:39:18.197 AM

**Recipient**

**Subject** Graduate School Student Assign Costing Allocation Loaded

**Body** Please review and if necessary, edit the Costing Allocation loaded/updated with Department or Grant specific details:  
224327  
216143  
216143

**Notification Topic**

Costing Allocation:	Student One	- P270889 Graduate School Student - (Memo) Graduate Student Health
Costing Allocation:	Student Two	- P258443 Graduate School Student - (Memo) Graduate Student Tuition
Costing Allocation:	Student Two	- P258443 Graduate School Student - (Memo) Graduate Student Tuition

# Costing Allocation Updated Notification Topic Details

**View Event** Costing Allocation: [redacted] - P216856 Graduate School Student - Research Assistant

For P216856 Graduate School Student

Overall Process Costing Allocation. - P216856 Graduate School Student - Research Assistant

Overall Status Successfully Completed

Due Date 05/24/2022

Calendars In Use Standard Business Calendar  
Yale Holidays and Recess Days

Details Process

**Event Details**

For P216856 Graduate School Student  
Research Assistant

- New Costing Allocations shows us the “after” update COA values
- Existing Costing Allocations shows us the “before” update COA values

**New Costing Allocations**

3 items

Turn off the new tables view

Start Date	End Date	Costing Allocation Attachments	Use Costing Worktag Defaults	Required with no Default (Must have Costing Override)	Grant	Gift	Yale Designated	*Cost Center	*Program	*Project
06/01/2022	08/31/2022						YD000003 General Appropriations - Self-support	CC0900 MEDDEA MD-PHD	PG00020 Scholarships and Student Aid (14)	PJ028458 Te Payroll Only - Cleared
05/23/2022	05/31/2022						YD000003 General Appropriations - Self-support	CC0900 MEDDEA MD-PHD	PG00020 Scholarships and Student Aid (14)	PJ028458 Te Payroll Only - Cleared

**Existing Costing Allocations**

2 items

Start Date	End Date	Use Costing Worktag Defaults	Required with no Default (Must have Costing Override)	Grant	Gift	Yale Designated	*Cost Center	*Program	*Project
06/01/2022	08/31/2022	Company: Yale University				YD000003 General Appropriations - Self-support	CC0900 MEDDEA MD-PHD	PG00020 Scholarships and Student Aid (14)	PJ028458 Payroll On Cleared



# Yale

## Graduate Student Funding

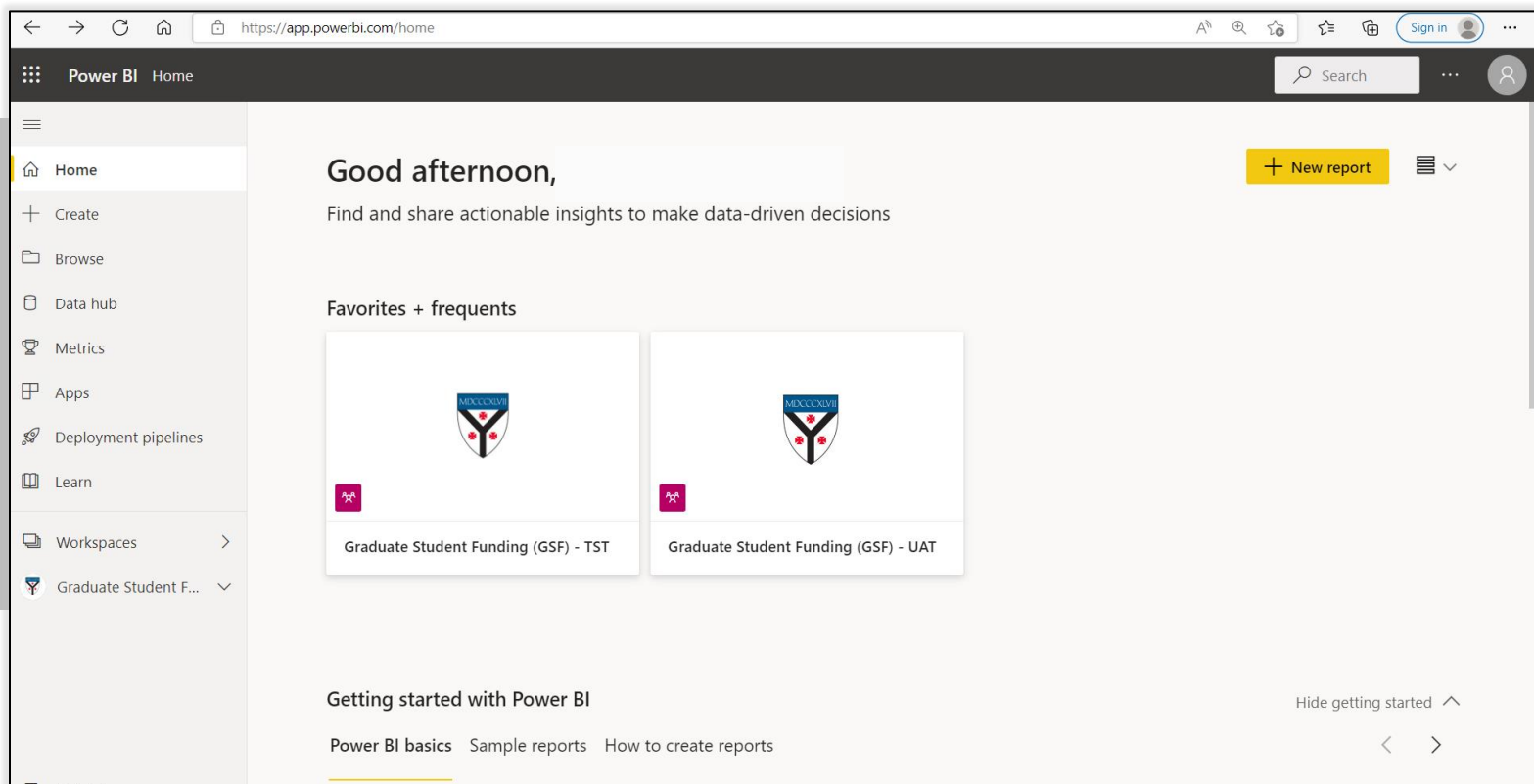
- [Reporting](#)
- [DataMart](#)





# Reporting

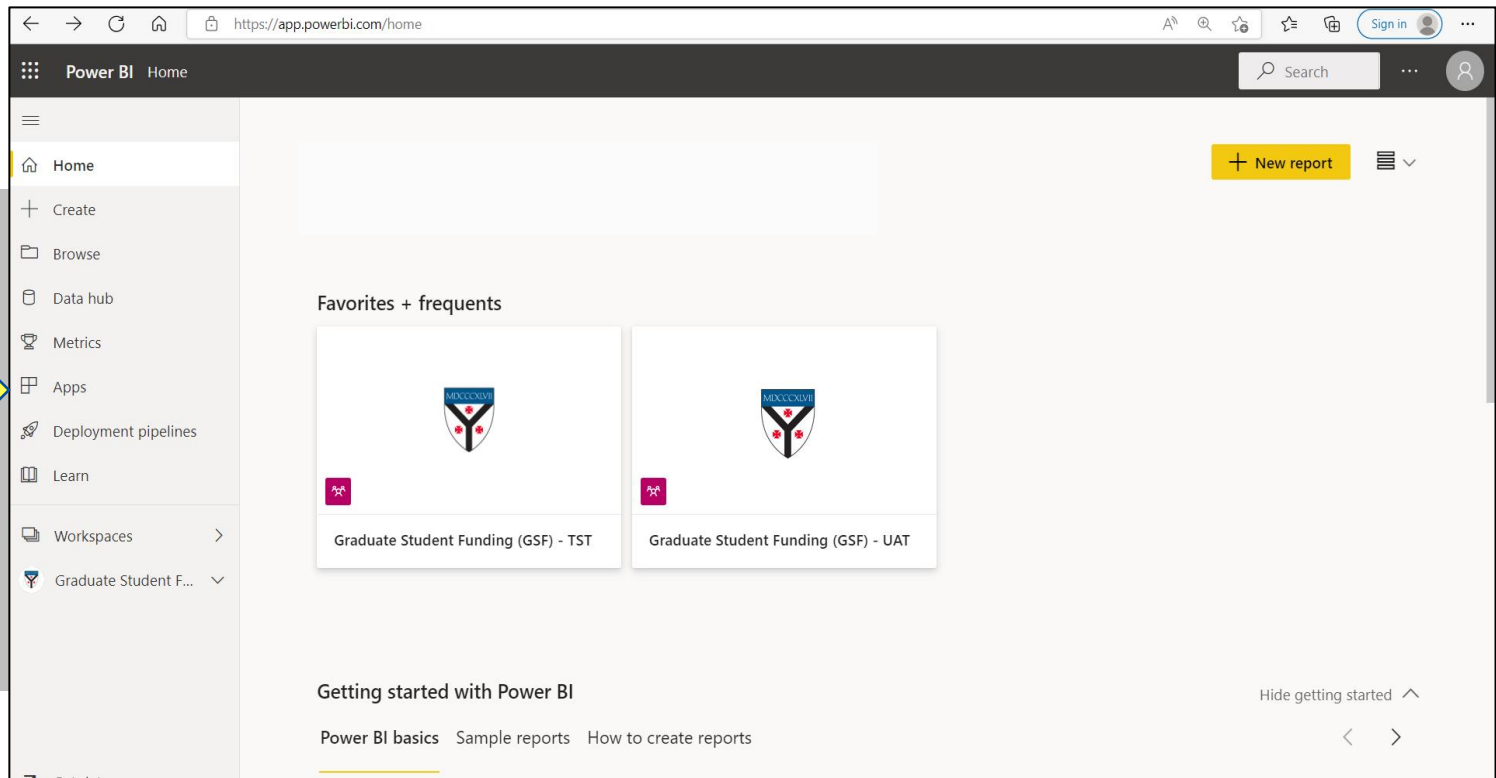
- Graduate Student Funding Reports will be accessed by using Microsoft Power BI Service
- The link to Power BI Service is <https://app.powerbi.com>
- This will bring you to the home page that will look similar to this:



For help contact the Finance Support Center at 432-5394 or [sharedservices@yale.edu](mailto:sharedservices@yale.edu).

# Reporting

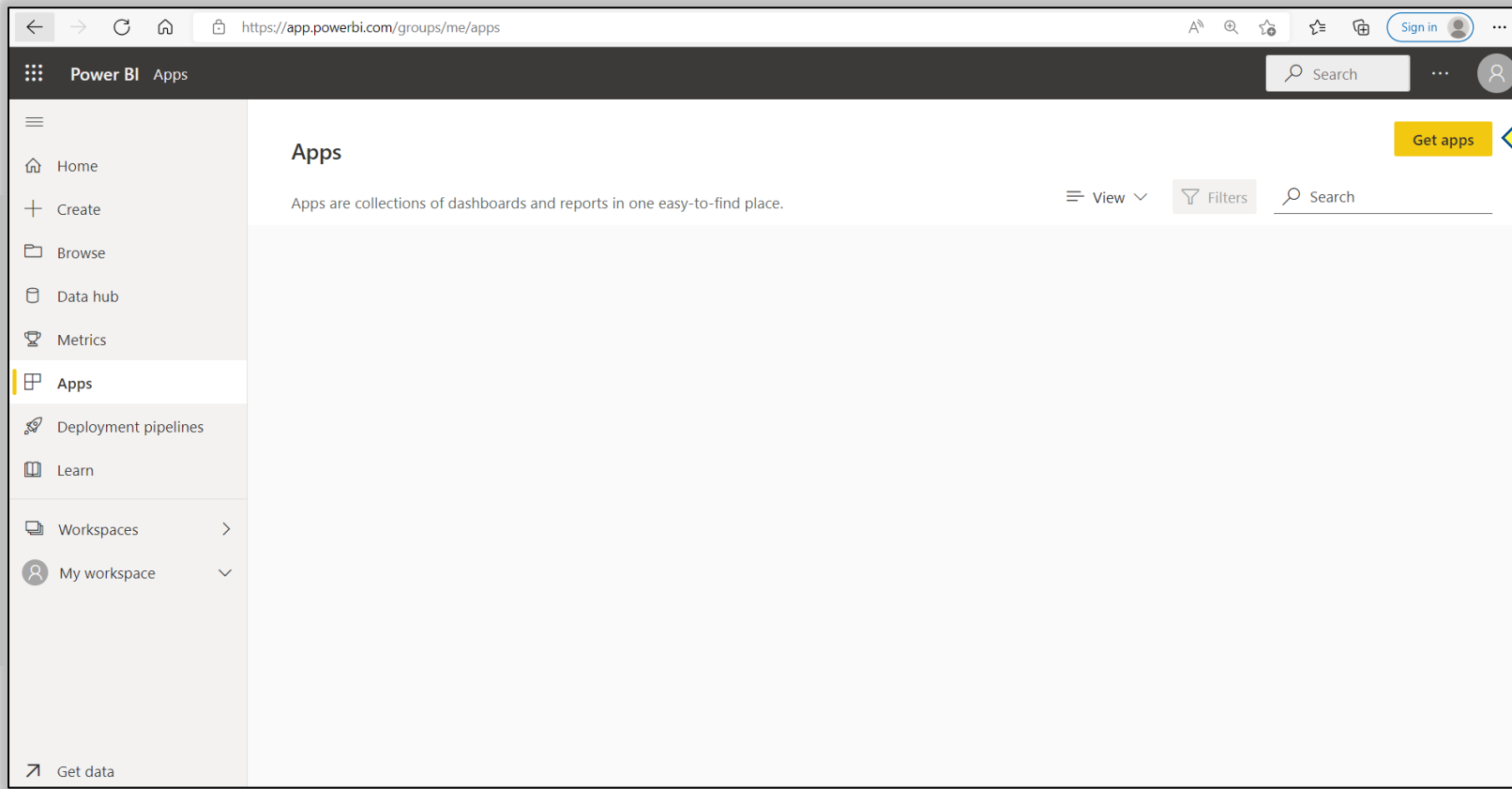
- Once on the home page, select 'Apps' on the left navigation bar:



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# Reporting

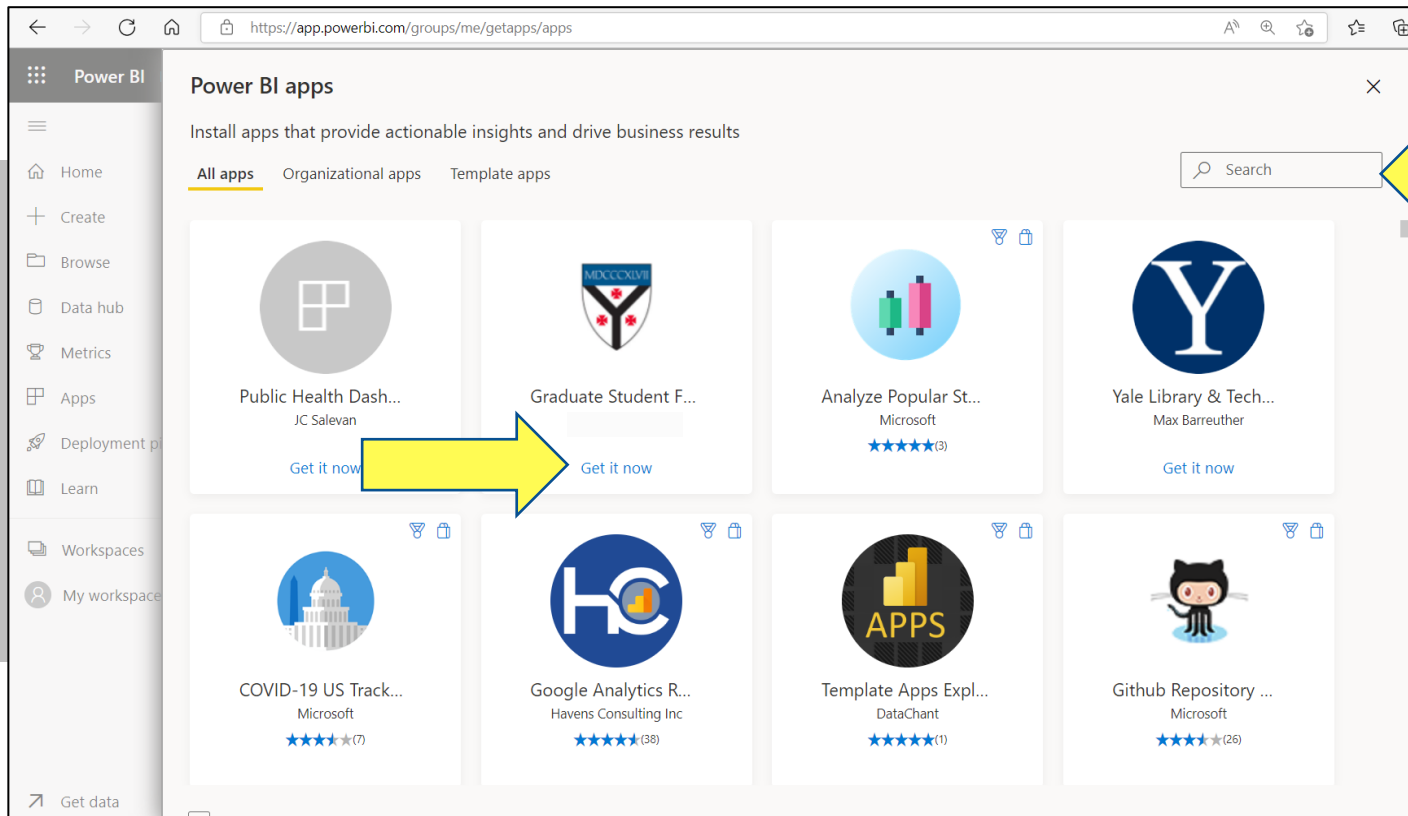
- On the 'Apps' page, Click on the gold 'Get Apps' button in the upper right.



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# Reporting

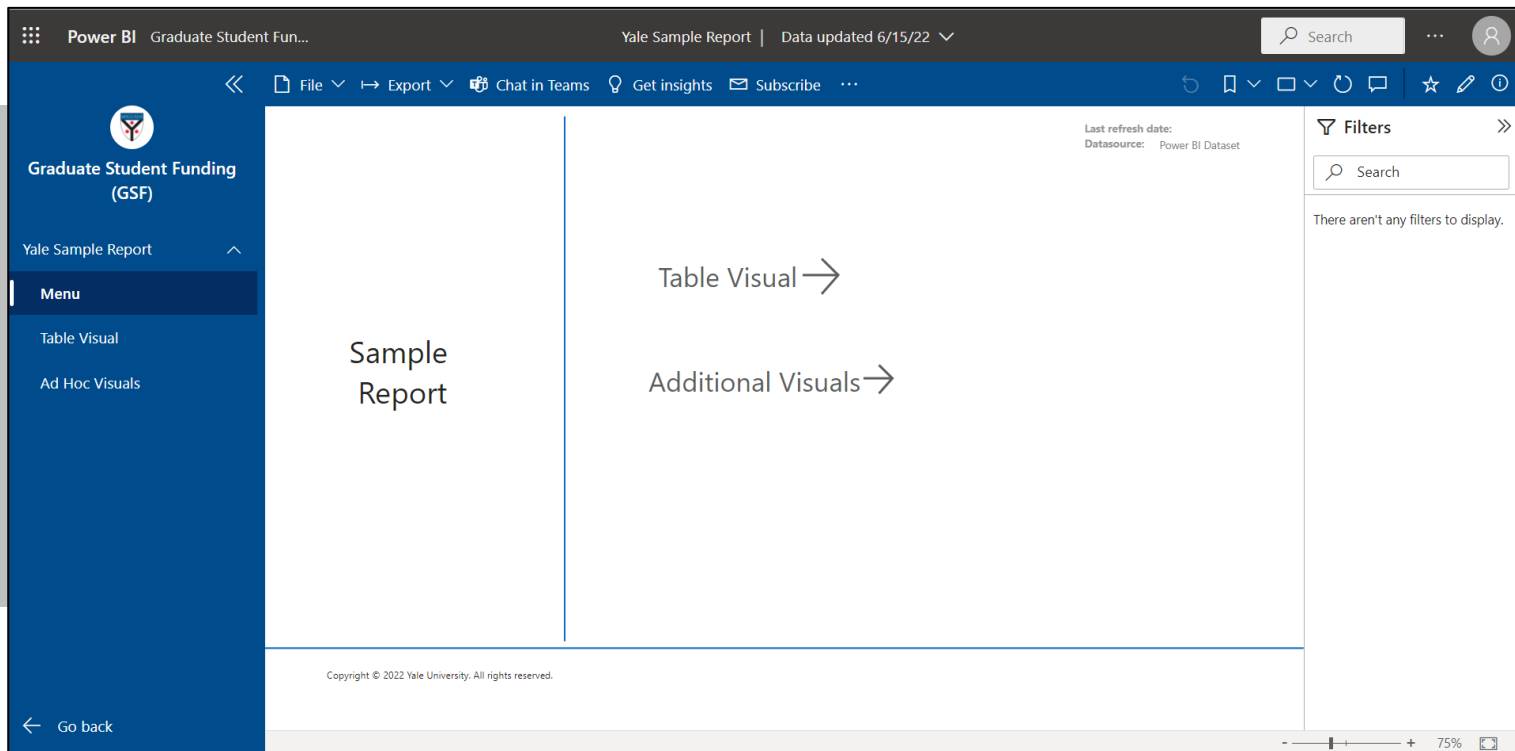
- Click on 'Get it now' on the Graduate Student Funding Reports tile. It may be in a different position on the screen depending upon what you have access to.
- If you cannot find it on this screen, use the Search bar in the upper right to search for 'Graduate Student Funding Reports'



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# Reporting

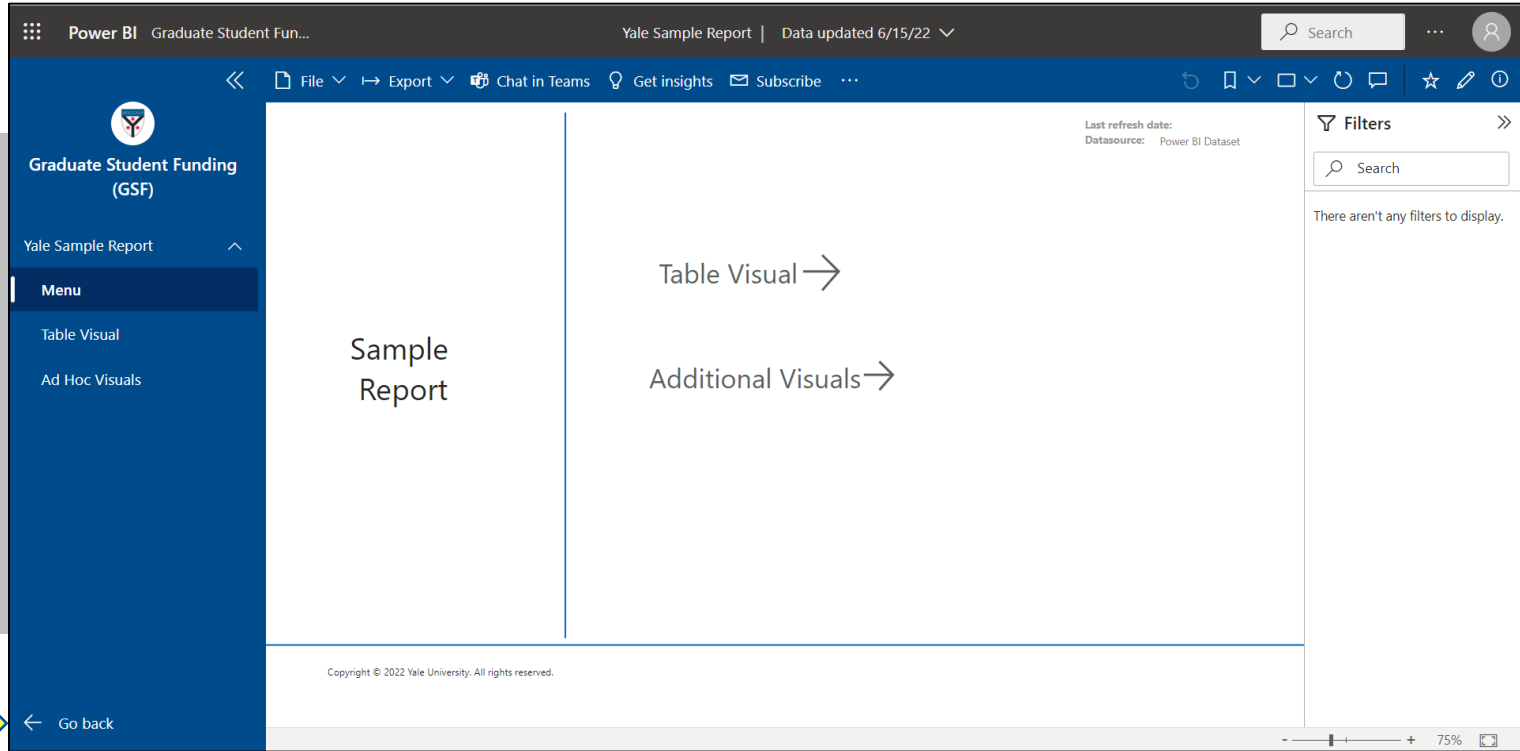
- You will then see a list of reports you have access to. Click on the report name you would like to open.
- If you only have access to 1 report, that report will launch automatically after clicking 'Get it now' on the App tile such as this:



For help contact the Finance Support Center at 432-5394 or [sharedservices@yale.edu](mailto:sharedservices@yale.edu).

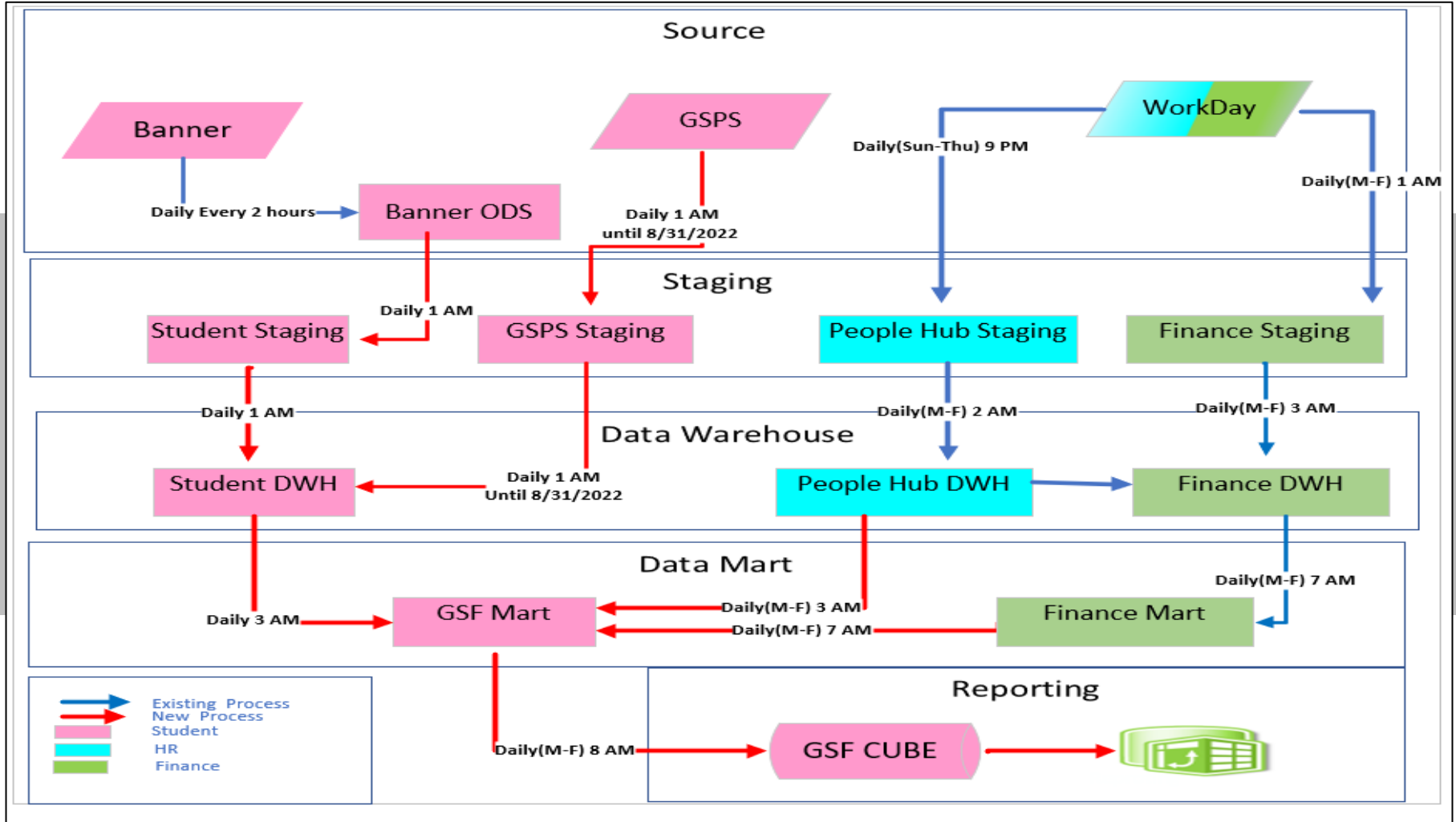
# Reporting

- Click on 'Go back' to return to the App menu page



For help contact the Finance Support Center at 432-5394 or [sharedservices@yale.edu](mailto:sharedservices@yale.edu).

# Data Mart



For help contact the Finance Support Center at 432-5394 or [sharedservices@yale.edu](mailto:sharedservices@yale.edu).

## Graduate Student Funding

### Timesheet X

- Visiting Assistant Researchers (VARs)  
Payment Process





# VAR Payment Process

- VAR payment process allows users to process tuition payments to currently enrolled VAR students.
- All tuition payments are processed in the VAR cost center within the student employment database, [yalestudentjobs.org](http://yalestudentjobs.org).
- Tuition payments are the only transactions processed in the VAR cost center. If you are also paying the student a stipend or other earnings, these payments are to be processed in the departmental cost center.
- Business Office access can be granted by emailing [student.employment@yale.edu](mailto:student.employment@yale.edu) with “VAR Access” in the subject line.

# VAR Payment Process – Two Step Process

## Step 1: Create Non-Hourly Award

- Find the employee that you are processing a payment for via the “Search Student” option in the TimesheetX menu

The screenshot shows the TimesheetX application interface. At the top, a navigation menu includes 'Student -', 'JobX -', 'TimesheetX -', 'Employers & Admins -', 'Reporting -', 'Access & Audit -', 'Uploads -', 'Site Set up -', 'Content -', and 'Help -'. The 'TimesheetX -' menu is open, displaying a dropdown list with options: 'Find Employees', 'TimesheetX Admin Home', 'TimesheetX Employer Home (To Do Items)', 'Manage TimesheetX Jobs', 'Timesheet Control Panel', 'Approve TimesheetX Hires', 'Non-Hourly Payment Queue', and 'Search Student Hires & Awards'. The 'Search Student Hires & Awards' option is highlighted in yellow. Below the menu, the 'Supervisor Employee Search Panel' is visible, containing search fields for 'First Name:', 'Last Name:', and 'Net Id', along with a 'Find Students' button. Below the search panel, a list of instructions is provided: 'Enter any of the filters (First name, Last Name, Net ID) and click “Find Students”', 'Select the correct student in the search results', 'The Student page will display any current/future awards. You can change the display based on the filter selected.', and 'Click on “Add an Award”'. Below the instructions, the 'STUDENT A' page is shown, featuring a 'Display:' dropdown menu set to 'Current/Future' and a link for 'Employee Information'. The page content states 'There are no hires or awards to display' and includes a red arrow pointing to the 'Add an Award' link.

- Enter any of the filters (First name, Last Name, Net ID) and click “Find Students”
- Select the correct student in the search results
- The Student page will display any current/future awards. You can change the display based on the filter selected.
- Click on “Add an Award”

# VAR Payment Process – Two Step Process

## Step 1: Create Non-Hourly Award cont'd

- Enter the Award (payment)
- Select the Time Period
  - The Time Period you select will place default Start & End dates in the hire record.

You will be able to update the dates in Step 2.

- Either select a COA from the dropdown list or enter a new COA.
- If you have access to multiple cost centers, the dropdown list will show the COAs for all your cost centers.
- When entering a new COA, you need to select VAR in the “Cost Center” field.

Student - JobX - TimesheetX - Employers & Admins - Reporting - Access & Audit - Uploads - Site Set up - Content - Help -

Add Award for Student A

Add a Student Award

You are adding a Stipend a Award

Award Amount \* 1500

Time Period \* Academic Year 20-21

Account Information

Please choose the appropriate account (COA) from the list below:

Choose One...

If you cannot find the correct account in the list above, fill out the fields below.

Enter a descriptive name for the account:

Enter the full COA charging instructions for the account:

Chart of Account

Company

Grant

Gift

Yale Designated

Cost Center

Program

Project

Assignee

Fund

Cost Center -- Choose One --

Submit

• The student's award has been created

Display: Current/Future Employee Information Update

There are no hires to display.

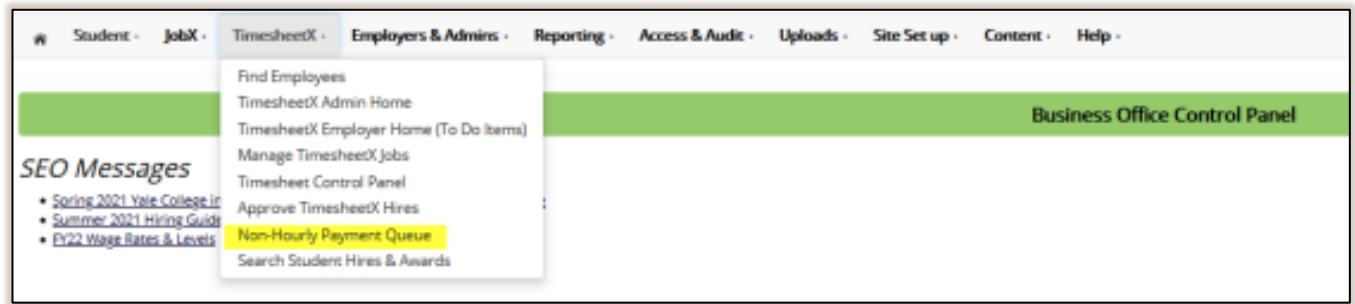
Awards

Award Name	Amount	Balance	Term
ASA Transit - 1	\$11,000.00	\$11,000.00	July/August 2022 (07/01/2022 - 08/30/2022)

# VAR Payment Process – Two Step Process

## Step 2: Create a VAR Payment

- Select the “Non-Hourly Payment Queue” from the TimesheetX menu



- The queue will show all pending non-hourly awards waiting to be processed for the cost centers for which you have access. As there are many business officers within cost centers, you may not recognize all the students, so please pay close attention when processing your payments.

A screenshot of a table titled 'Non-Hourly Awards without Hires'. The table has columns for Student, Student ID, Award, Time Period, Amount, and Action. There is one row of data for 'Student A' with an award of 'ASA Transit - 1' for 'Academic Year 20-21' for an amount of '\$10.00'. The 'Action' column contains links for 'Action to New Hire', 'Edit', and 'Delete'.

Student	Student ID	Award	Time Period	Amount	
Student A		ASA Transit - 1	Academic Year 20-21	\$10.00	<a href="#">Action to New Hire</a> <a href="#">Edit</a> <a href="#">Delete</a>

# VAR Payment Process – Two Step Process

## Step 2: Create a VAR Payment cont'd

- Assign to New Hire link: This is where you will hire the student into the “Tuition Fellowship” position within the VAR cost center, update the time-period for the payment, assign supervisors, and select the pay element.

Create a Non-hourly Hire	
Student	Student A
Cost Center	VAR
Job	Tuition Fellowship
Award Account	ASA Transit - 1
Award Amount	11000.00
Time Period	July/August 2022
Hire Start Date *	<input type="text" value="08/22/2022"/>
Hire End Date *	<input type="text" value="08/25/2022"/>
Primary Supervisor *	Heather Abati
Secondary Supervisors	Ctrl + click to select multiple <input type="text" value="Select Some Options"/>
Pay Element *	VAR - Tuition Fellowship
Post-action page	<input checked="" type="radio"/> Go to hire detail page <input type="radio"/> Return to Stipend Queue
<input type="button" value="Add Hire"/> <input type="button" value="Cancel"/>	

**Start & End dates must be in the same week (Sun - Sat) for a one-time payment.**

# VAR Payment Process – Two Step Process

## Step 2: Create a VAR Payment cont'd

- To view the payment detail, from the Business Office Control Panel, go to:
  - Active eTimesheet Archive
  - Select the “VAR” cost center
  - Click on “View Hires”
  - Click “Stipend Payment” for student you are looking for
  - Once the payment has occurred, the Status will be updated to “Paid”.
- The tuition payment file is processed every Tuesday for the prior week.
- Once step 2 is complete, all changes need to be processed by the Student Employment Office.

# VAR Payment Process – Reporting

You can verify your data entry by running the “TimesheetX Award Details” report.

- Select “Standard Reports” from the Reporting Menu
- Go to the “My TimesheetX Reports” tab
- Select “TimesheetX Award details” report by clicking “Run Report”
  - Enter the appropriate filters – click “Next”
  - Select a “Group By” option. You do not need to select a second sort - click “Next”
  - You can export the data for easy analysis o All VAR payments are processed in this cost center so the report may contain data for students that you are unfamiliar with. Once the payment has occurred, the “Status” will be updated to “Paid”.
- Questions can be sent to [student.employment@yale.edu](mailto:student.employment@yale.edu)

# Payment Types GSF Will **Not** Support

Payment Type	System to Use	User Group responsible
AR Early Starts	TimesheetX	Department
Augusta G. Hazard	TimesheetX	Department
Dean's Colloquia	TimesheetX	GSAS FAO
Departmental Jobs & One Time Payments	TimesheetX	Department
Ender's Awards	TimesheetX	GSAS FAO
ELP early start & Math camp early start	TimesheetX	GSAS FAO
Grader without Contact	TFS/TimesheetX	GSAS FAO
GSAS Dean's Emergency Fund	TimesheetX	GSAS FAO
GSAS Hardship Stipends	TimesheetX	GSAS FAO
ISPS Policy Fellows	TimesheetX	Department
John Morton Blum Fellowship	TimesheetX	GSAS FAO
MacMillan One Time Payments	TimesheetX	MacMillan
MacMillan Summer Grant Payments	TimesheetX	MacMillan
Master's Student Stipends	TimesheetX	Department
Master's Student Teaching	TFS/TimesheetX	Department
Prize Teaching Annual Award	TimesheetX	GSAS FAO
Professional School Student Teaching in FAS	TFS/TimesheetX	Department
Project Assistant – One Time Payments	TimesheetX	Department
GSAS Relocation Stipends	TimesheetX	GSAS FAO
Summer Student Teaching	TimesheetX	Department
ULA & UCG	TFS/TimesheetX	Department
VAR Student Compensation & Tuition	TimesheetX	Department



# Yale

## Graduate Student Funding

### APPENDIX:

- Sample Student Payslip
- Fund Type to Comp Plan Mapping
- GSF Resources



# Workday: Student's Payslip (with Retro)

Sample Student Payslip [Note: this is not visible by Business Offices]

Earnings 4 items

Description	Dates	Hours	Rate	Amount	YTD
Graduate Student Stipends					642.29
Student Teaching Assist					888.88
Research Assistant	02/01/2022 - 02/15/2022	0.00	0.00	2,041.67	22,458.37
Research Assistant	09/01/2021 - 01/31/2022	0.00	0.00	5,104.20	
<b>Total:</b>				<b>7,145.87</b>	<b>23,989.54</b>

# Fund Type to Comp Plan Mapping

Length of Award	Fund Type	Award Type	Allowance Compensation Plan	Compensation Plan Code	Earning	Earning Code	Payslip Name	Taxable	Note
Ongoing	REAS	Standard Assistant in Research	Graduate Research Assistant	REAS	Research Assistant	resasst	Student Research Assistant	Yes	
Ongoing	SERN	Student Other Earnings	Graduate Student Earnings	SERN	Other Student Earnings	otherstuearn	Other Student Earnings	Yes	
Ongoing	STIP	Standard Stipend	Graduate Student Stipend	STIP	Graduate Student Stipends	stipend	Graduate Student Stipends	No*	
Ongoing	TEAN	Standard Non-Stipend Teaching	Graduate Student Teaching Assistance	TEAN	Student Teaching Assist	stuteach	Student Teaching Assistance	Yes	
Ongoing	TEAC	Fellowship	Graduate Student Fellowship Teaching	TEAC	Fellowship Teaching	felteach	Student Fellowship Teaching	Yes	
Ongoing	HEAL	Standard Health	Graduate Student Health	HEAL	(Memo) Graduate Student Health	GSH	Graduate Student Health		New, defaults to zero
Ongoing	TUIT	Standard Tuition	Graduate Student Tuition	TUIT	(Memo) Graduate Student Tuition	GST	Graduate Student Tuition		New, defaults to zero
Ongoing	HLTD	External Funding Direct to Student Health	Graduate Student Direct Health	HLTD	do not send to payroll				
Ongoing	STID	External Funding Direct to Student Stipend	Graduate Student Direct Stipend	STID	do not send to payroll				
Ongoing	TEAD	External Funding Direct to Student Teaching	Graduate Student Direct Teaching	TEAD	do not send to payroll				
Ongoing	TUID	External Funding Direct to Student Tuition	Graduate Student Direct Tuition	TUID	do not send to payroll				
One-Time Payment	STPF	One-Time Family Subsidy	Graduate Student Family Subsidy OTP	STPF	Graduate Student Family Subsidy	GSFS	Graduate Student Family Subsidy	No*	New
One-Time Payment	STPL	One-Time Top Up	Graduate Student Top Up Fellowship OTP	STPL	Graduate Student Top Up Fellowship	GSTF	Graduate Student Top Up Fellowship	No*	New
One-Time Payment	STPG	One-Time Graduating Student Payout	Graduate Student Graduating OTP	STPG	Graduate Student Graduating	GSG	Graduate Student Graduating	No*	New

# Graduate Student Funding Resource Page

- [Graduate Student Funding New Process Overview video](#)
- [Managing Graduate Student Funding site](#)
- [Frequently Asked Questions](#)
- For other questions, contact [gradfinaid@yale.edu](mailto:gradfinaid@yale.edu).