



# **Student Non-Wages Payment**

## **Scholarships or Stipend**

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# Terminology & Process

# Terminology

- Scholarship -Tuition and Books
- Stipend - Living expenses
- Earned Wages - Money paid for services completed such as teaching, research or other duties
- International Student - Any student who is not a US Citizen or Permanent Resident
- DocuSign PowerForm - Software used to safely and securely sign documents electronically

# Process

- Department information needed for DocuSign PowerForm
  - Student information
  - Scholarship Program
  - Funding Source
  - Financial Manager Name and Email
  
- Automated Routing for review/approvals
  - Funding Financial Manager
  - International student route to Finance Tax Office
  - Scholarship Office
  - Grants Accounting



# Let's Get Started

# Let's Get Started

- Ask 'Is this payment for earned wages paid for teaching, research or other services?'
  - Yes, complete a hiring employment contract
- Forms located on Business & Finance Forms webpage
  - Original/Revised Requests used for the following:
    - Request Payment for Student Non-Wages (US Citizen/Permanent Resident)
    - Request Payment for Student Non-Wages (International)
    - Make changes to the original request
  - Cancellation
    - Request to Cancel future Payment for Student Non-Wages

# Let's Get Started

- A separate form must be submitted:
  - For each student
  - For the academic year, preferably
  - By the deadlines stated on the form
- DocuSign forms will replace emails, paper processes and removes the Accounting Office from the review process
- Request for Payments to International students will not route to the Scholarship Office until student has provided the Finance Tax Office with appropriate documents





# Request for Payment

# Create PowerForm: Recipient Information

- Enter your full name & email address as the requestor
- Enter full name & email address of financial manager and student receiving the fund
- Click 'BEGIN SIGNING' to enter the form

**PowerForm Signer Information**

Fill in the name and email for each signing role listed below. Signers will receive an email inviting them to sign this document.

Please enter your name and email to begin the signing process.

**Requestor**

**Your Name: \***

**Your Email: \***

Please provide information for any other signers needed for this document.

**Financial Manager/PI**

**Name:**

**Email:**

**Student**

**Name:**


**Email:**

**BEGIN SIGNING**

# DocuSign Acknowledgement

- Click 'GOT IT' to acknowledge the Finish Later section
- Click 'CONTINUE' to access the fields on the form

**Please Review & Act on These Documents**

 **Carol Laney**  
University of Memphis

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**MEMPHIS**

Powered by **DocuSign**

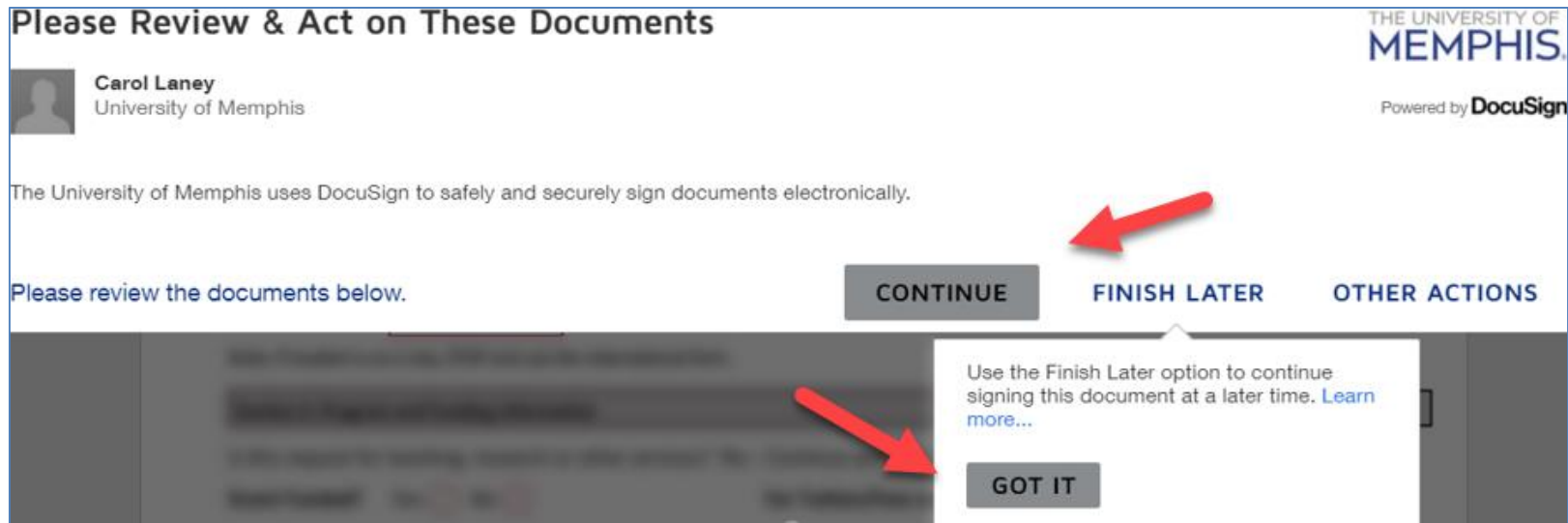
The University of Memphis uses DocuSign to safely and securely sign documents electronically.

Please review the documents below.

**CONTINUE** **FINISH LATER** **OTHER ACTIONS**

Use the Finish Later option to continue signing this document at a later time. [Learn more...](#)


**GOT IT**



# Complete Section I: Student Information

- **Red boxes** indicate required fields throughout the form
- Indicate whether the request is the original request or a revised request
- This form is not to be used for cancellations. See [Student Payment Cancellation Request](#).

DocuSign Envelope ID: D3B49832-B787-4905-AC78-18A60AC81ED4

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Request Payment for Student Non-Wages  
(US Citizen/Permanent Resident)

*Form Due Dates: Fall-June 1, Spring-November 1, Summer-March 1*

**Section I: Student Information**

Student Name:  Student Banner ID: U  Student UUID:  @memphis.edu

Type of Request:

Note: If student is on the International form.

**Section II: Program and Funding Information**

# Complete Section II: Program and Funding Information

- **Red boxes** indicate required fields

**Section II: Program and Funding Information**

Is this request for teaching, research or other services? No – Continue with Form Yes-Click here to cancel. Complete E-Contract

Grant Funded? Yes ☐ No ☐ For Tuition/Fees only? Yes ☐ No ☐

Program Budgeted Amount: \$  /year Original Budgeted Amount ☐ Revised Budgeted Amount ☐

Program Name:  Program Payment Begin Date:  End Date:

Program Description:

**Section III: Student Payment Information** Select the appropriate checkboxes to open the additional required fields.

# Complete Section III: Student Payment Information

- Clicking on the Scholarship and/or Stipend check box will open other fields available
  - Amounts can be entered for one or more terms
- Total Amount Requested is automatically calculated based on amounts entered
- Only one funding source can be used
- Account codes have been pre-populated

Section III: Student Payment Information - Select the appropriate checkbox to open the additional required fields.

<input type="checkbox"/> Scholarship Term(s)/Amounts:	Fall \$ _____	Spring \$ _____	Summer \$ _____	Total \$ _____
<input type="checkbox"/> Stipend Schedule:	# payments: _____	For: \$ _____	= Total \$ _____	
	Payment Effective Date: _____	Student's Total Amount Requested: \$ <u>0.00</u>		
Index: <input type="text"/>	Fund: <input type="text"/>	Org: <input type="text"/>	Account: Scholarship <u>79710</u>	Program: _____ Activity: _____
			Account: Stipend <u>79717</u>	Program: _____ Activity: _____

# Complete Section IV: Requestor Information

- Enter your department name and phone number
- Clicking 'FINISH' in the top right corner will route the form to the Scholarship Office

The screenshot shows the 'Section III: Requestor Information' form. On the left is a 'START' button. The form fields are: 'Requestor Name' (with a blurred name), 'Requestor UUID' (with a blurred name followed by '@memphis.edu'), 'Requestor Department' (with an empty red box), 'Phone' (with an empty red box), and 'Date Form Submitted' (with the date '10/5/2020'). Above the form is a toolbar with icons for zooming, downloading, printing, and help. In the top right corner, there are two buttons: 'FINISH' and 'FINISH LATER'. A red arrow points to the 'FINISH LATER' button.

Section III: Requestor Information

Requestor Name: \_\_\_\_\_ Requestor UUID: \_\_\_\_\_@memphis.edu Phone: \_\_\_\_\_

Requestor Department: \_\_\_\_\_ Date Form Submitted: 10/5/2020

START FINISH FINISH LATER



# Financial Manager Approvals



# Complete Section V: Program and Funding Approvals

- Financial Manager/Designee of the funding source to sign electronically by clicking the 'Sign' button
- Clicking 'FINISH' to route the form to the Scholarship Office (International students will route to Tax Compliance before Scholarships)
- After the Scholarship Office completes their review, the financial manager, Grants Accounting, Tax Office and student will be notified

**START** **FINISH** **OTHER ACTIONS**

Requestor Name: \_\_\_\_\_ Requestor UUID: \_\_\_\_\_@memphis.edu Phone: 1111  
Requestor Department: test Date Form Submitted: 10/5/2020

**Section IV: Program and Funding Approvals**

Fin Mgr/Designee: Name: \_\_\_\_\_ UUID: \_\_\_\_\_@memphis.edu Signature **Sign** Date 10/5/2020  
Scholarship: Name: \_\_\_\_\_ UUID: \_\_\_\_\_ Date: \_\_\_\_\_ Fund Code: \_\_\_\_\_



# Payment Cancellation

# Create PowerForm: Recipient Information

- Enter your full name & email address as the requestor
- Enter full name & email address of financial manager and student receiving the fund
- Click 'BEGIN SIGNING' to enter the form

**PowerForm Signer Information**

Fill in the name and email for each signing role listed below. Signers will receive an email inviting them to sign this document.

Please enter your name and email to begin the signing process.

**Requestor**

**Your Name: \***

**Your Email: \***

Please provide information for any other signers needed for this document.

**Financial Manager/PI**

**Name:**

**Email:**

**Student**

**Name:**


**Email:**

**BEGIN SIGNING**

# DocuSign Acknowledgement

- Click 'GOT IT' to acknowledge the Finish Later section
- Click 'CONTINUE' to access the fields on the form

**Please Review & Act on These Documents**

 **Carol Laney**  
University of Memphis

THE UNIVERSITY OF  
**MEMPHIS**  
Powered by **DocuSign**

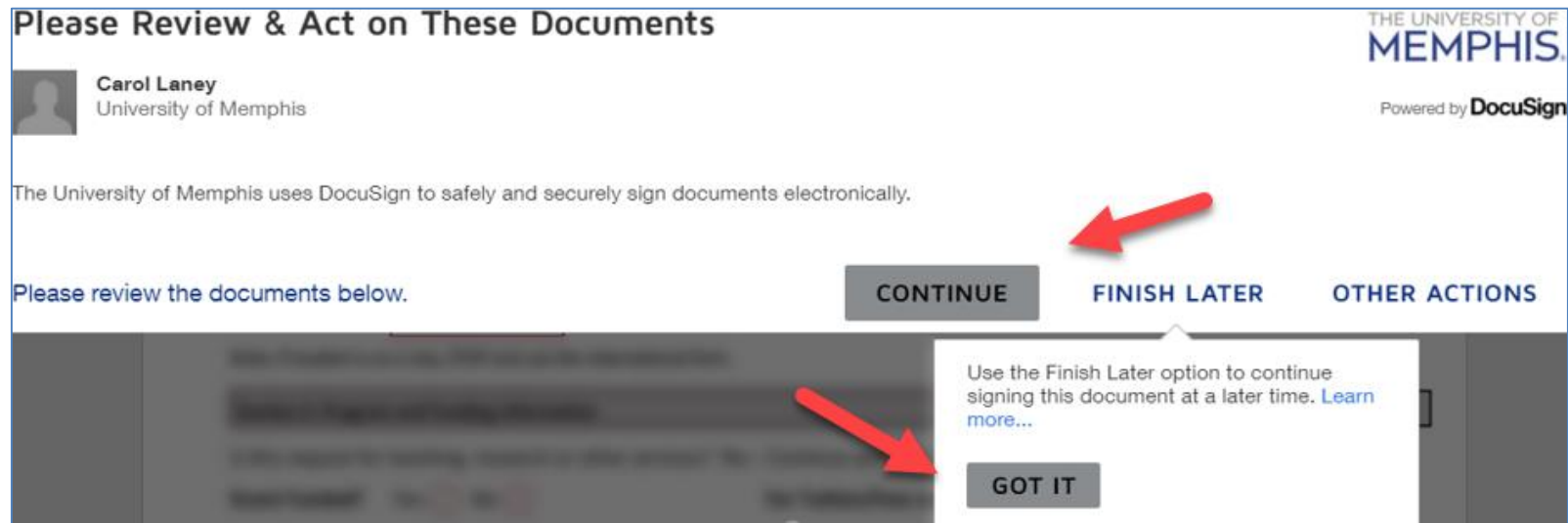
The University of Memphis uses DocuSign to safely and securely sign documents electronically.

Please review the documents below.

**CONTINUE** **FINISH LATER** **OTHER ACTIONS**

Use the Finish Later option to continue signing this document at a later time. [Learn more...](#)


**GOT IT**



# Complete Section I: Student Information

- **Red boxes** indicate required fields throughout the form
- Select whether student is a US Citizen/Permanent Resident or International student

DocuSign Envelope ID: FC4D98E6-02FD-4B4A-82D4-3488376E20FC

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Request to **Cancel** Payment for Student Non-Wages

*This form is to be used for Student Non-Wages **Cancellations** only. If you need to adjust an existing scholarship or stipend, submit a revised Request Payment for Student Non-Wages form found at*

**Section I: Student Information**

Student Name:

Student Banner ID: U

Student UUID: @memphis.edu

Phone:

Citizenship:

**Section II: Program Information**

Program Name:

Program Payment Begin Date:

End Date:

**US Citizen/Permanent Resident**

**International**

# Complete Section II: Payment Cancellation Information

- Red boxes indicate required fields

Section II: Payment Cancellation Information					
Program Name: <input type="text"/>		Program Payment Begin Date: <input type="text"/>		End Date: <input type="text"/>	
<input type="checkbox"/> Cancel <u>Future</u> Scholarship Term(s):	Fall	Spring	Summer	Cancel All Terms	
<input type="checkbox"/> Cancel <u>Future</u> Stipend Payment(s)	Effective Date: _____				
Index: <input type="text"/>	Fund: <input type="text"/>	Org: <input type="text"/>	Account: Scholarship <u>79710</u>	Program: _____	Activity: _____
			Account: Stipend <u>79717</u>	Program: _____	Activity: _____

# Complete Section III: Requestor Information

- Enter your department name and phone number
- Clicking 'FINISH' in the top right corner will route the form to the Financial Manager

The screenshot shows a web form titled "Section III: Requestor Information". On the left, there is a "START" button. On the right, there are "FINISH" and "FINISH LATER" buttons. A red arrow points to the "FINISH" button. The form fields are as follows:

Section III: Requestor Information			
Requestor Name:	<input type="text"/>	Requestor UUID:	<input type="text"/> @memphis.edu
Requestor Department:	<input type="text"/>	Phone:	<input type="text"/>
		Date Form Submitted:	10/5/2020

# Complete Section III & IV: Program and Funding Approvals

- Financial Manager/Designee of the funding source to sign electronically by clicking the 'Sign' button
- Clicking 'FINISH' in the top right corner will route the form to the Scholarship Office
- After the Scholarship Office completes their review, the financial manager, Finance Tax Office and student will be notified

Requestor Name: \_\_\_\_\_ Requestor UUID: \_\_\_\_\_@memphis.edu Phone: 1111  
Requestor Department: test Date Form Submitted: 10/5/2020

**Section IV: Program and Funding Approvals**

Fin Mgr/Designee: Name: \_\_\_\_\_ UUID: \_\_\_\_\_@memphis.edu Signature: \_\_\_\_\_ Date: 10/5/2020  
Scholarship: Name: \_\_\_\_\_ UUID: \_\_\_\_\_ Date: \_\_\_\_\_ Fund Code: \_\_\_\_\_

START FINISH OTHER ACTIONS

Sign

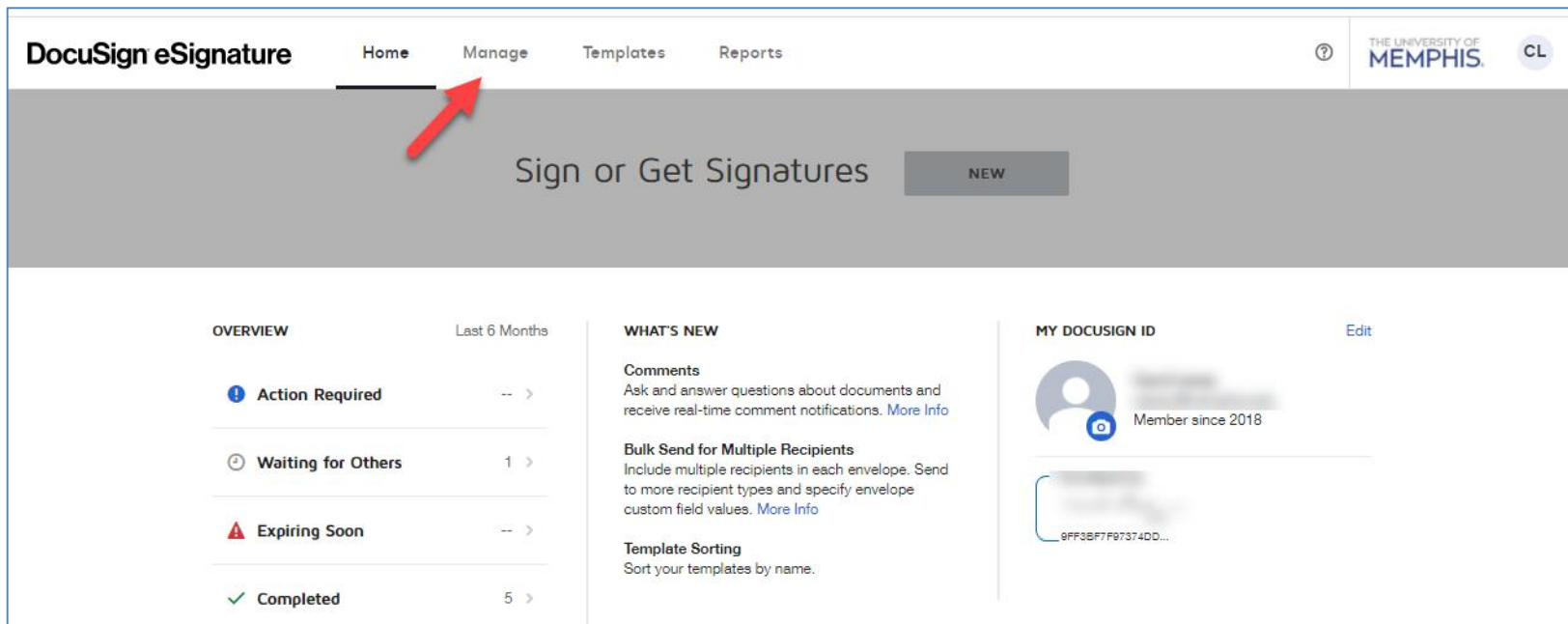




# Checking Document Status

# Checking Document Status:

- Login to DocuSign via myMemphis portal – Employee Tab
- Enter your email address on the DocuSign webpage when prompted
- Click on 'Manage' to open the DocuSign dashboard



# Checking Document Status:

- Under Envelopes, click 'Inbox'
- Document Status Types:
  - **Need to Sign** – You have an action to take on the form. Click 'SIGN' button to begin signing process
  - **Waiting for Others** – You have completed your signing step and others remain in the signing process
  - **Completed** – All recipients have completed signing document
  - **Voided** – Requestor voided form or form expired due to missing signatures (after 120 days)

The screenshot displays the 'Inbox' view of a document management system. On the left, a sidebar shows 'NEW' and 'Shared Envelopes' buttons, followed by an 'ENVELOPES' section with a list: 'Inbox' (highlighted with a red arrow), 'Sent', 'Drafts', and 'Deleted'. The main area is titled 'Inbox' and includes a search bar and a 'FILTERS' button. Below this, a table lists documents with columns for 'Subject', 'Status', and 'Last Change'. A red arrow points to the 'Status' column. The table contains three entries, all with a 'Need to Sign' status and a 'SIGN' button.

Subject	Status	Last Change
<input type="checkbox"/> Schlp/Stipend Requests: Sarah Student/[redacted]@memphis.edu To: Rendal Requestor, Frannie Finmgr +3 more	Need to Sign	10/7/2020 03:11:58 pm
<input type="checkbox"/> Schlp/Stipend Cancellation: Sally Student/[redacted]@memphis.edu	Need to Sign	10/5/2020 04:18:07 pm
<input type="checkbox"/> [redacted]	Need to Sign	10/5/2020 10:35:17 am

# ‘Waiting for Others’ Status

- From the Inbox, double-click on the subject line of the appropriate form to see what role currently has the form and what roles remain

**Schlp/Stipend Requests: Sarah Student/ [redacted]@memphis.edu** ⓘ

[Envelope ID](#)  
Last change on 10/7/2020 | 03:23:03 pm  
Sent on 10/7/2020 | 03:04:08 pm

ⓘ Need to Sign


**SIGN** RESEND MOVE CORRECT MORE ▾

⬇️ ⬇️

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**Recipients** SIGNING ORDER

	COMPLETED	
1 ✓ Rental Requestor [redacted]		Signed on 10/7/2020   03:11:56 pm <a href="#">Signed in location</a>
3 ✓ Frannie Finmgr [redacted]		Signed on 10/7/2020   03:23:01 pm <a href="#">Signed in location</a>
9 Sally Scholarship [redacted]	CURRENT	Needs to Sign
Gary Grants [redacted]	WAITING	CC Receives a Copy
11 Sarah Student [redacted]		CC Receives a Copy

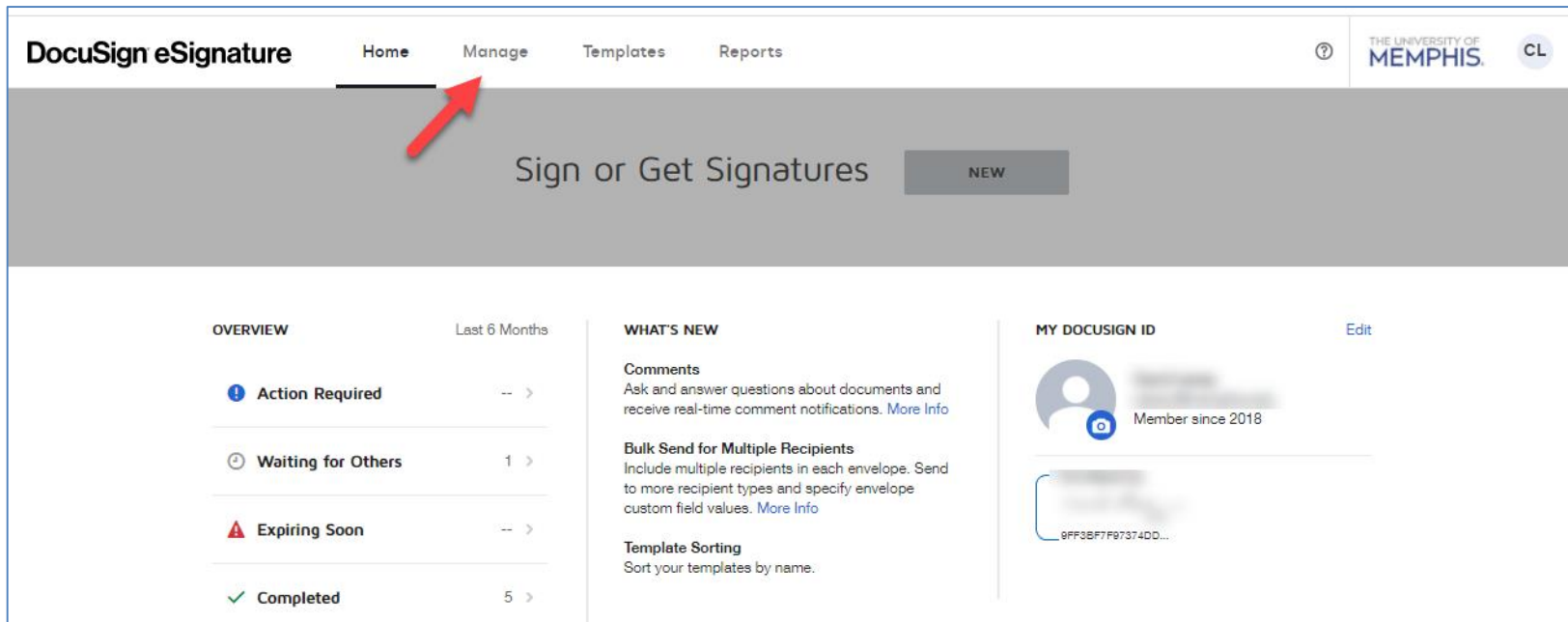




# Searching for Documents

# Searching Documents:

- Login via myMemphis portal – Employee Tab
- Enter your email address on the DocuSign webpage
- Click on 'Manage' to open the dashboard



# Searching Documents:

- Under Envelopes, click 'Inbox'
- On the right, enter a recipient's name or UUID into search box and click 'Apply'
- Additional search criteria will appear but are optional

The screenshot shows a web interface for searching documents. On the left, the 'Inbox' section is titled 'Inbox' and shows a list of documents filtered by 'Date (Last 6 Months)'. The list has columns for 'Subject' and 'Status'. The first two visible subjects are 'Schlp/Stipend Requests: Sarah Student/...' and 'Schlp/Stipend Cancellation: Sally Student/...'. The status for these is 'Need to...'. On the right, there is a search filter panel. At the top, a search box contains 'Sarah Student' and has a red box around it. Below the search box is a checkbox for 'Include envelope custom fields'. There are three dropdown menus: 'Status' (set to 'All'), 'Sent' (set to 'By Anyone'), and 'Date' (set to 'Last 6 Months'). At the bottom of the filter panel, there is a red box around the 'APPLY' button, and a 'RESET' button next to it.

Inbox	
Filtered by: Date (Last 6 Months)	
Subject	Status
<input type="checkbox"/> <b>Schlp/Stipend Requests: Sarah Student/...</b> To: Rendal Requestor, Frannie Finmgr +3 more	Need to...
<input type="checkbox"/> <b>Schlp/Stipend Cancellation: Sally Student/...</b> To: ...	Need to...
<input type="checkbox"/> <b>Schlp/Stipend Cancellation: Sally Student/...</b> To: ...	Need to...
<input type="checkbox"/> <b>Schlp/Stipend Cancellation: Sally Student/...</b> To: ...	Need to...
<input type="checkbox"/> <b>Schlp/Stipend Cancellation: Sally Student/...</b> To: ...	Need to...

× FILTERS

☐ Include envelope custom fields

Status

Sent

Date

# Search Results in DocuSign:

- All DocuSign forms meeting the search criteria will appear in search results regardless of status
- Follow [Checking Document Status](#) steps to determine where form is in the routing process

Inbox			<input type="text" value="Sarah Student"/>	FILTERS
Filtered by: Date (Last 6 Months)   <a href="#">Edit</a>				
Subject		Status	Last Change ▼	
<input type="checkbox"/>	<b>Schlp/Stipend Requests: Sarah Student/</b> [redacted]@memphis.edu To: Randal Requestor, Frannie Finmgr +3 more	Need to Sign	10/7/2020 03:23:03 pm	<b>SIGN</b> ▼
<input type="checkbox"/>	<b>Schlp/Stipend Cancellation: Sarah Student/</b> [redacted] To: [redacted] Frannie Finmgr +3 more	Completed	9/29/2020 10:48:52 am	<b>DOWNLOAD</b> ▼



# Questions

Scholarship Office

[scholarships@memphis.edu](mailto:scholarships@memphis.edu)

901.678.3213

