Department Sponsored Student Billing (Portal)

Accounts Receivable Operations

970-491-3419

BFS_ARO_PORTAL@Mail.ColoState.edu

Colorado State University

Why use the Portal for Department Billing?

- Allows departments with Graduate Assistants (GA) and/or GRA-Predocs to pay for tuition and/or fees on behalf of the student.

- Tuition and/or fees are transferred from the student's account to the department account in Banner.

- Electronic process allows flexibility for the departments to add, change, and delete students.

- Electronic process places accountability within the departments.

How does the electronic process work?

- **Step 1: Uploading** – a transaction between the department and the student account
  - Department populates the Graduate Assistant (GA) and/or GRA-Predoc Template with their appropriate coverage.
  - Department uploads GA or GRA-Predoc Template File to ARO Portal.
  - Students must authorize the department as their sponsors for charges to transfer off their account.
  - Office of Financial Aid reviews uploaded students to record any changes which could affect student's financial aid.

- **Step 2: Invoicing** – a transaction between the department, ARO and the Graduate School
  - ARO invoices departments for tuition and fees for designated student that were uploaded (usually 10 days after census date).
  - Departments will access their invoice and assign applicable KFS account numbers and object code (including sub-account and sub-object if needed) in the ARO Portal to each student which is where charges will be paid from.
  - Fiscal Officer (FO) and/or Delegate of KFS accounts approve their designated account on the invoice. If denied, a comment should be placed by the FO/Delegate and the invoice is routed back to department for correction.
  - Grad School reviews each department's submission of completed invoices. Upon review, Grad School approves or declines department submission. If denied, invoice is routed back to department for correction.

Supported Internet Browsers

- Chrome

- Internet Explorer 10 or 11
  - Turn compatibility view off

Access the Portal through BFS's ARO Website

http://busfin.colostate.edu/Depts/ALR.aspx

→ Click on Graduate Assistant and GRA-Predoc portal PRODUCTION

Main Screen of ARO Portal

Department of Business & Financial Services Campus Portal

→ http://wsnet2.colostate.edu/CWIS12/bfsapp/Default.aspx

      Login with current NetID and Password

Navigating Sponsor Billing Menu

PRODUCTION, MACHINE: WSPROD   Current Logged in user: n/a   Login   Department of Business & Financial Services Campus Portal

HOME
ACCOUNTS PAYABLE
ACCOUNTS RECEIVABLE
CAMPUS SERVICES
Cashier
MERCHANT SERVICES
SPONSOR BILLING

Accounts and Loans Receivable

Sponsor Billing

Student Lookup
Dept List
Student Upload
Student Contract Upload
Sponsor Dept Maintenance
Sponsor Reports
Sponsor Invoice
Sponsor History
GRA Predoc Template File
Grad Assistant Template File
User Guide

- To Upload a Template: select **Student Upload**

- To Change, Add, Delete a **Pending** Student: select Student Upload

- To Change, Add, Delete a **Processed** Student: select Student Lookup

- To view a status of a student, **Pending or Processed**: select Student Lookup

- To review Department Invoice and Enter Account Information: select Sponsor Invoice

- Student Contract Upload, Sponsor Dept Maintenance, Sponsor Report, and Sponsor Billing History are for ARO use only.

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Download Template From Portal
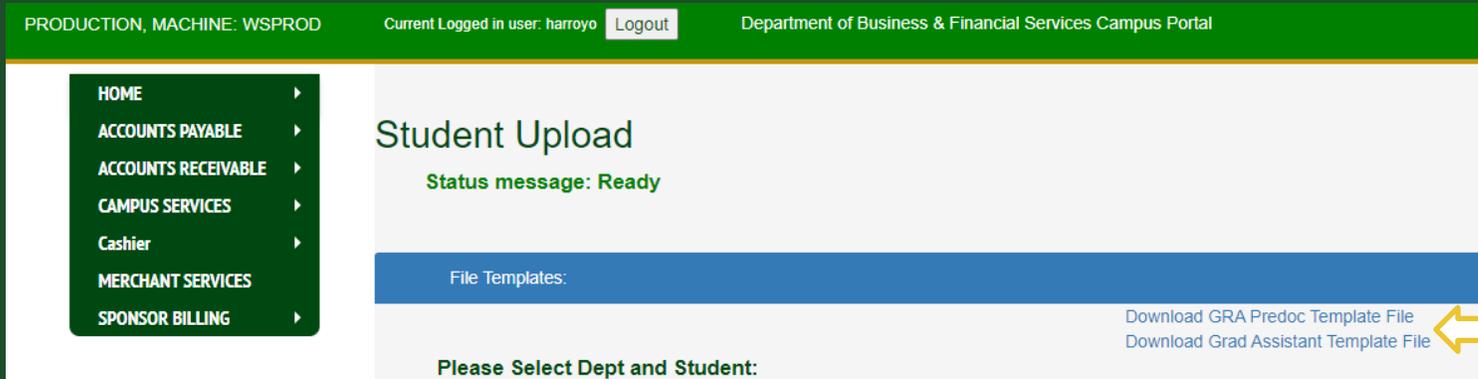
- Templates are located on the Student Upload Page of the Portal and from the Dropdown Menu under the Sponsor Billing heading.
- Download Templates as Needed.
- Templates are specific to Graduate Assistants and GRA-Predocs.
- Templates are locked and cannot be modified except for the appropriate fields.
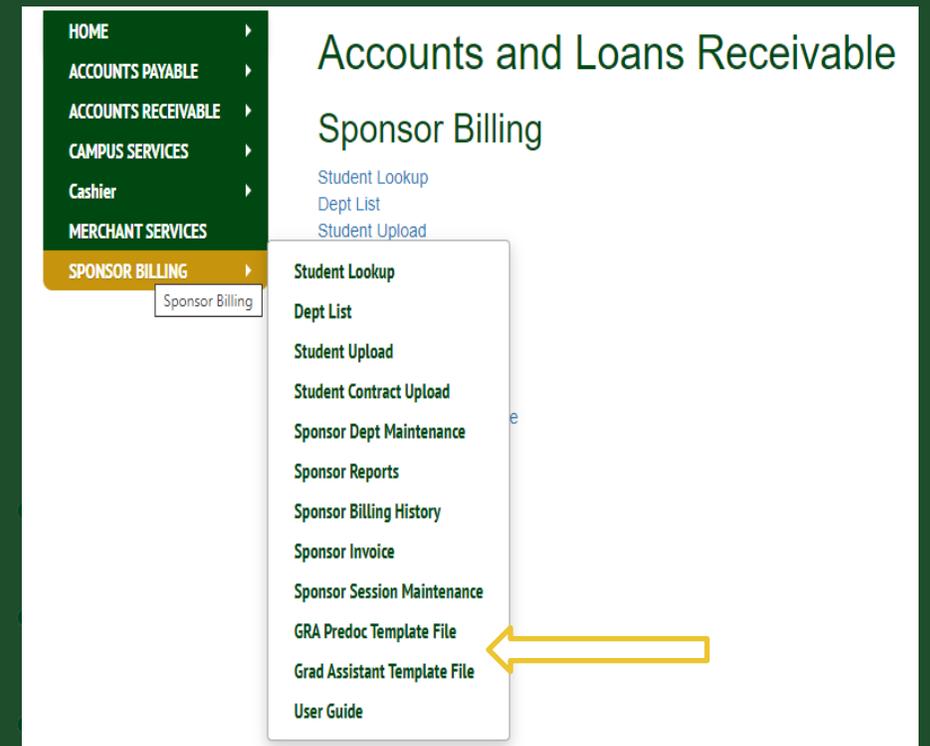
Populating Your Department Template

GRA-Predoc Template

	A	B	C	D	E	F
1	Student's CSU ID	Change Type (Use A or leave blank for Add, C for Change, or D for Delete)	Full Tuition Only	Other Tuition Paid	Partial Fees	Full Fees
2						
3						

Graduate Assistance (GA) Template

	A	B	C	D	E	F
1	Student's CSU ID	Change Type (Use A or leave blank for Add, C for Change, or D for Delete)	.5FTE	.25FTE	Other Tuition Paid	Partial Fees
2						
3						

Templates are uploaded to the Portal to identify the Graduate Assistants and/or GRA Predocs a department is paying charges for.
- Must contain valid CSU ID number
- Templates are Locked
- Templates are not case sensitive
- Dollar amount cannot exceed $20,000.00
- Once completed save template to a local drive

Contract Type Definitions:
- Full Tuition = 100% of Base Tuition
- Other Tuition Paid = Specific amount paid towards Base Tuition
- Partial Fees = 75% of Mandatory Fees
- Full Fees = All fees for GRA Predocs
- FTE = Students HR Status in Oracle
  - .25FTE = 50% of Base Tuition
  - .5FTE = 100% of Base Tuition

Department Template Definitions

GRA-Predoc Template

	A	B	C	D	E	F
1	Student's CSU ID	Change Type (Use A or leave blank for Add, C for Change, or D for Delete)	Full Tuition Only	Other Tuition Paid	Partial Fees	Full Fees
2						
3						

GRA-Predoc Template:
- Select Full Tuition Only or Other Tuition Paid **AND** Partial Fees or Full Fees.
- If a student has tuition coverage must have 'X' in column C
  - If 'Other Tuition Paid' must have dollar amount in column D
- Must place an 'X' in column E **or** F

GA Template:
- Select .5FTE, .25FTE, or Other Amount Paid AND Partial Fees
- If a student has tuition coverage must have 'X' in either column C or D
  - If 'Other Tuition Paid' must have a dollar amount in column E
- Must place an 'X' in column F

Graduate Assistance (GA) Template

	A	B	C	D	E	F	
1	Student's CSU ID	Change Type (Use A or leave blank for Add, C for Change, or D for Delete)	.5FTE	.25FTE	Other Tuition Paid	Partial Fees	
2							

Step 1 – Uploading Students via Template

1. **Select Student Upload**
2. **Select your Department**
3. **Select Choose File, to reach the desired file from saved location on your local drive**
4. **Click Upload File**

Step 1 – Uploading Students via Template Cont'd

Successfully uploaded template without errors

5. Submit File

Student Upload

Status message: Ready

Sponsor ID: 832615211

Dept Name: ADMIN - Academic Computing & Networking Services

| Choose File | No file chosen | | Upload File | Upload Complete | Term: 202410 |

| Submit | Home |

5

Please review list for errors. If the list is complete click submit. To correct errors, correct the spreadsheet and re-upload.

STUDENT'S CSU ID	NAME	SPONSOR ID	CHANGE TYPE	.5FTE	.25FTE	OTHER TUITION PAID	Partial Fees	Error Message
832863333	Arroyo, Haley	832615211	A	☑	☐		☑	

After template has been successfully submitted a hold will be placed on the students account preventing a refund for seven days.

Office of Financial Aid is notified to adjust student's financial aid as needed.

Step 1 – Uploading Students via Template Cont'd

Unsuccessfully uploaded template with errors

Not selecting the Partial Fee's box within the template

Student Upload

Status message: There are 1 error line(s) in the uploaded file.
Please correct your file and upload again.

Sponsor ID: 832615211
Dept Name: ADMIN - Academic Computing & Networking Services

Choose File | No file chosen   Upload File   Upload Errors   Term: 202410

Submit   Home

Please review list for errors. If the list is complete click submit. To correct errors, correct the spreadsheet and re-upload.

STUDENT'S CSU ID	NAME	SPONSOR ID	CHANGE TYPE	.5FTE	.25FTE	OTHER TUITION PAID	Partial Fees	Error Message
832863333	Arroyo, Haley	832615211	A	☐	☑		☐	Error: select Partial Fees

Selecting multiple tuition coverage options.

Student Upload

Status message: There are 1 error line(s) in the uploaded file.
Please correct your file and upload again.

Sponsor ID: 832615211
Dept Name: ADMIN - Academic Computing & Networking Services

Choose File | No file chosen   Upload File   Upload Errors   Term: 202410

Submit   Home

Please Upload File for Student Graduate Assistant

STUDENT'S CSU ID	NAME	SPONSOR ID	CHANGE TYPE	.5FTE	.25FTE	OTHER TUITION PAID	Partial Fees	Error Message
832863333	Arroyo, Haley	832615211	A	☑	☑		☑	Error: select one and only one of .5FTE, .25FTE, OR Other Tuition Paid

- Templates are validated when uploaded and incorrect information within the template will result in an error.
- Verify that the correct template is being uploaded for either GAs or GRA-Predocs.
- Edit information on errored entries within the template and re-upload corrected template to the portal.
- For GRA-Predoc uploads you need to select one or the other of Partial Fees or Full Fees
- If a GA student does not have tuition coverage only select Partial Fees

Step 1 – Uploaded Students

Once Successfully Uploaded:

→ System generated email will be sent to the Department User after the template is uploaded and the Banner nightly production run is completed.

→ If a Change or Delete needs to be made prior to a student being fully <u>Processed,</u> changes can be made directly in the portal using the Student Lookup option or a new Template with the changes can be reuploaded into the Portal.

Please Review GA Uploaded Data for ADMIN - OVPR - Research Services

BFS AR Sponsor
To ● Pyles,Andrew

↩ Reply   ↩ Reply All   → Forward

Wed 7/24/2024 9:04 AM

SponsoredStudents.csv
4 KB

Andrew Pyles,

You are receiving a listing of what has been uploaded for the Spring 2024 semester for your department based on the templates that were loaded into the portal. You may receive multiple emails if you uploaded multiple templates. Please review the data as listed below to confirm this is an accurate listing of graduate assistants or GRA Predocs. After reviewing the list, please make any changes or corrections directly in the Sponsor Billing Portal. **You will have until 2pm Wednesday 07/24/2024 to make any corrections** prior to the students being loaded into Banner as sponsored by the department. Please note that the department head will receive a final listing of department sponsored students prior to sponsor billing.

Thank you,

ARO Sponsor Billing

Contract Type Definitions
FTE = Students HR Status in Oracle
.25FTE = 50% of Base Tuition
.5FTE = 100% of Base Tuition
Other Amount = Specific Amount paid towards Base Tuition
Partial Fees = 75% Mandatory Fees

Sponsored Students

CSU ID	Name	Sponsor ID	Sponsor Name	Selection Type	Contract Type	Upload NetID	Upload Date
835523984	Kirby, Natasha	832615211	ADMIN - OVPR - Research Services	GA	.5 FTE, PARTIAL FEES	abpyles	2024-06-26 08:13:22
832419351	Gadaleta, Lucas	832615211	ADMIN - OVPR - Research Services	GA	1,234.00, PARTIAL FEES	abpyles	2024-06-26 08:13:22
836646182	Wight, Alana	832615211	ADMIN - OVPR - Research Services	GA	.25 FTE, PARTIAL FEES	abpyles	2024-06-26 08:13:22
835175818	Brown, Cole	832615211	ADMIN - OVPR - Research Services	GA	PARTIAL FEES	abpyles	2024-06-26 08:13:22

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Step 1 – Uploaded Students cont'd

Student and Department Account

→ Students are placed on a Contract **two days** after the initial upload is completed in Banner.

→ Charges are transferred off the Student Account and onto the Departmental Account in Banner, once the sponsor authorization has been completed by the student.

Charges occur on Student Account originally (shown below), and once upload by the department and student has authorized 'Transfer of 3rd Party Sponsor' occurs on student's account.

Example Shown: $4,960.00 worth of Base Tuition, Res GR PT and percentage of Mandatory Fees is now off the Student Account and on the Departments Account in Banner. We will then invoice the department (Step 2) for uploaded students and their respective amounts.

Detail Code *	Description *	Term *	Charge	Payment	Balance	Source *	Effective Date *	
ARTP	Transfer to 3rd Party Sponsor	202410		16.83	-16.83	C	06/17/2024	
ARTP	Transfer to 3rd Party Sponsor	202410		16.00	-16.00	C	06/17/2024	
ARTP	Transfer to 3rd Party Sponsor	202410		95.00	-95.00	C	06/17/2024	
ARTP	Transfer to 3rd Party Sponsor	202410		466.62	-466.62	C	06/17/2024	
ARTP	Transfer to 3rd Party Sponsor	202410		4,960.00	-4,960.00	C	06/17/2024	
TRG7	Base Tuition, Resident GR PT	202410	4,960.00		4,960.00	T	05/21/2024	
TQRJ	Graduate Program Diff Tuition	202410	920.00		920.00	T	05/21/2024	
TFUF	University Facility Fee	202410	190.00		190.00	T	05/21/2024	
TFTR	University Alt Transport Fee	202410	33.65		33.65	T	05/21/2024	
TFTC	University Technology Fee	202410	32.00		32.00	T	05/21/2024	
TFGF	General Fee	202410	933.23		933.23	T	05/21/2024	

Step 1 – Sponsor Authorization

→ Graduate Assistants and GRA-Predocs are considered sponsored students, therefor must complete the Sponsor Authorization in RAMweb.
→ Accounts Receivable will notify students via their University email when the authorization is available for completion in RAMweb.
  → Students will receive a daily reminder until the authorization is completed.
→ A hold preventing the charges from transferring off the student's account and onto the department's account will be placed until the authorization has been completed.
→ Sponsor authorization is done once per department, per semester.

Steps for the student to authorize sponsor:
1. Log into RAMweb.
2. Click on the Menu in the upper right hand corner.
3. Click on Billing and Tax Information.
4. Click on Billing Information.
5. Under Student Resources, click on the Authorize Sponsor link.
6. Read the Sponsored Student Agreement and FERPA and then click on the Authorize Sponsor button to agree.
7. That's it! Authorized charges will transfer to your sponsor in the nightly production run and you will receive a confirmation email containing the sponsor authorization. Please keep the email for your records.

Step 1 – Changing Students via Student Lookup

Used to change entries directly in the Portal for students
→ Use Edit to initiate changes; the Contract Desc will allow for a dropdown to change student's coverage
→ Use Delete to remove the student entirely from the Portal
  → This will transfer the charges back onto the student account
→ When changes have been recorded, use the Update button to Save or use Cancel to reset to the original entry
  → Once a student is in a <u>Processed</u> status changes can only be made via Student Lookup Page
  → <u>Pending</u> students can be changed with a Template upload or on the Student Lookup Page

Step 1 – Updating Students via Student Lookup Cont'd

Department users can view the status of individual student at any time but will not be able to make modifications if the user does not have access to the department listed on the Student Lookup Screen.

Student Lookup

Status message: Ready

Please Enter CSU ID: [835229641] [Submit]   Term: [202410 ▾]

		STUDENT ID	STUDENT NAME	SPONSOR ID	SPONSOR NAME	SELECTION TYPE	CONTRACT NUMBER	CONTRACT DESC	AMOUNT	CONTRACT STATUS	Fee CONTRACT NUMBER
Edit	Delete	835229641	Evans-Mosley, Jaihad	825437467	NR - Fish & Wildlife Conservation Biology	GA	25	OTHER AMOUNT PAID PARTIAL FEES	$3,000.00	PROCESSED	21

Student Lookup

Status message: Ready

Please Enter CSU ID: [833381172] [Submit]   Term: [202410 ▾]

		STUDENT ID	STUDENT NAME	SPONSOR ID	SPONSOR NAME	SELECTION TYPE	CONTRACT NUMBER	CONTRACT DESC	AMOUNT	CONTRACT STATUS	Fee CONTRACT NUMBER
Edit	Delete	833381172	Nestor, Trevor	835171779	ADMIN - SAMD - GRA-Predoc	GRA-Predoc	20	FULL TUITION PARTIAL FEES		PROCESSED	21

Step 1 – Updating Students via Student Lookup Cont'd

Once Changes have been saved or a Deletion has occurred, an email notification is sent indicating the changes to the Office of Financial Aid (OFA) and ARO.

Department Sponsored Student Change or Delete

BA   BFS ARO Portal
      To   Pyles, Andrew

The following student has experienced a change in their department sponsorship.

Student ID: 835523984 Student Name: Natasha Kirby
Sponsor Id: 832615211 Dept Name: ADMIN - Academic Computing & Networking Services
Deleted from .25 FTE PARTIAL FEES.

Please contact Accounts Receivable at 970-491-3419 or reply to this email if you have additional questions.

Thank you,
ARO Sponsor Billing

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Step 2 – Sponsor Invoice (SI) Review

Step 2 – Sponsor Invoice (SI)

Once invoices are available in the Portal, an email notification will be sent to the department users from the BFS_ARO_Portal email listing the deadline to complete the invoices by.

Spring 2024 Sponsor Invoice (SI)

BA   **BFS ARO Portal**
To ● BFS ARO Portal

↩ Reply   ↩ Reply All   → Forward

Tue 2/13/2024 4:07 PM

ⓘ You forwarded this message on 4/30/2024 11:51 AM.

Good Afternoon!

Department sponsor invoices (SI) generated today and are now available in the ARO portal. When reviewing your departmental invoice you will see a line item for the students Base Tuition then an additional line item labeled Mandatory Fee which will consist of *50% of eligible mandatory fees* per the new Graduate School initiative. Please log into Sponsor Billing to complete your invoice dated 2/13/2024. **Department invoices must be completed and routed to the Graduate School by 02/23/2024.**

Just a few friendly reminders while navigating your departments invoice:

- When editing the Base Tuition Line item, please be mindful of the students assignment type (GRA, GTA, GSA, GRA Predoc) as the Object Code utilize matters and should match what is shown in Oracle.

  5762 GRA TUITION REMISSION
  Tuition paid for qualified graduate **research assistants** using sponsored program or University department funds as part of their GRA compensation. This includes payment of both RI base and differential tuition. Payments are remitted to the student via a credit to their student account, using the Sponsor Portal and/or the Department Payment to Student Account (DPSA) form. Payment amounts cannot exceed actual charges. This is a non-taxable employee benefit to the student, and is reported on the student's Form 1098-T as a reduction to qualified tuition charges reported in Box 2.

  5763 GTA TUITION REMISSION - RESIDENT
  Tuition paid for qualified **resident** graduate **teaching assistants** using sponsored program or University department funds. This includes payments of both RI base and differential tuition. Payments are remitted to the student via a credit to their student account, using the Sponsor Portal and/or the Department Payment to Student Account (DPSA) form. Payment amounts cannot exceed actual charges. This is a non-taxable employee benefit to the student, and is reported on the student's Form 1098-T as a reduction to qualified tuition charges reported in Box 2.

  5764 GTA TUITION REMISSION - NONRESIDENT
  Tuition paid for qualified **nonresident** graduate **teaching assistants** using sponsored program or University department funds. This includes payments of both RI base and differential tuition. Payments are remitted to the student via a credit to their student account, using the Sponsor Portal and/or the Department Payment to Student Account (DPSA) form. Payment amounts cannot exceed actual charges. This is a non-taxable employee benefit to the student, and is reported on the student's Form 1098-T as a reduction to qualified tuition charges reported in Box 2.

  5765 GSA TUITION REMISSION - RESIDENT
  Tuition paid for qualified **resident** graduate **support assistants** using sponsored program or University department funds. This includes payments of both RI base and differential tuition. Payments are remitted to the student via a credit to their student account, using the Sponsor Portal and/or the Department Payment to Student Account (DPSA) form. Payment amounts cannot exceed actual charges. This

Step 2 – Sponsor Invoice – Helpful Resources

Helpful Information when Processing Sponsor Invoice (SI)

- **Tuition Premium (TP)** - https://graduateschool.colostate.edu/financial/assistantships/graduate-research-assistantship-tuition-premium-program/
    - Calculation: In State Base Tuition Amount – Out of State Base Tuition Amount = TP
        - Per Tuition and Fee schedule for FA22-SP23 on a 9-credit hour enrollment
            - $5,417.10 - $13,282.20 = $7,865.10 (TP Amount)
- **Fee Initiative** – https://graduateschool.colostate.edu/financial/assistantships/graduate-assistant-fee-coverage-plan/
    - Covered Mandatory Fees - General Fees, University Technology Fee, University Facility Fee, University Alternative Transportation, SEVIS Fee and Health Network Fee
    - KFS Accounts to used on invoice

1301301	GTA/GSA Mandatory Fee Benefit
1301302	GRA/GRA Predoc Fee Exempt Account

- **Office of Financial Aid's Resources**
    - Tuition and Fee Schedule – https://financialaid.colostate.edu/base-tuition/
    - In-State Residency - https://financialaid.colostate.edu/in-state-tuition-requirements/

- **KFS Object Code Listings and Definitions**
  http://busfin.colostate.edu/Forms/CampusSvcs/Object_Code_Listing.pdf

Object Codes Names:
- 5762 = GRA/GRA-Predoc Tuition Expense
- 5763 = GTA Tuition Resident Expense
- 5764 = GTA Tuition Nonresident Expense
- 5765 = GSA Tuition Resident Expense
- 5766 = GSA Tuition Nonresident Expense
- 5767 = Fee Expense

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Step 2 – Sponsor Invoice – Billing Department

Login to the ARO Portal and Access the Sponsor Invoices (SI) screen from the menu.

1. Select the Invoice Date and Sponsor (Department)
2. Select the appropriate role for task to be completed – users will not have all the roles listed below:
   - Dept – enters accounting information
   - Fiscal Officer – approves accounting information/edits their accounts, KFS driven
   - Delegate – approves accounting information on behalf or in absence of Fiscal Officer, KFS driven
   - Grad – used by Graduate School only
   - Grad FO – used by Graduate School Fiscal Officer only
3. Select Edit for desired student for Base Tuition and Mandatory Fee total, then continue to the popup screen

Step 2 – Sponsor Invoice – Billing Department cont'd

Editing a Student – Base Tuition & Differential Tuition Line Item

1. Enter Account Number, Object Code, (Sub Account and Sub Object if Applicable)
   a) If student is TP Eligible, click the TP Box – Grad School's default account number and object code will populate – enter amount being paid by the Grad School.
2. Enter amount being paid by the department for each account number. The total amounts from the account lines must equal the Amount being edited in the header.
3. After account information and amount has been entered click on Save Changes for account information validation.
   b) Click on Close to dismiss the popup screen.

- The Portal will validate against Kuali (KFS) to verify all accounts entered are valid when Save Changes is clicked.
- Comments are encouraged when needed – this is the only means of tracking what questions department users may have for Fiscal Officers and/or Grad School concerns or reasons why an invoice is declined.

Step 2 – Sponsor Invoice – Billing Department cont'd

Editing a GA Student – Mandatory Fee Item

1. Enter Account Number, during the phase in approach the two account numbers to be used are:
   - 1301301 – GTA/GSA
   - 1301302 – GRA/GRA Predoc
2. Object Code used for Fee benefits is always 5767.
3. Enter amount being paid, must equal the Amount listed above in the header.
4. After account information has been entered click on Save Changes for account information validation, then Close to dismiss the popup screen.

Please note that during the phase in approach the percentage is already calculated in the Amount displayed so no additional calculations are needed by the department when entering in the amounts. If you wish to pay the remaining balance that needs to be done via DPSA Form.

Fees included in Graduate School Initiative are General Fees, University Technology Fee, University Facility Fee, University Alternative Transportation, SEVIS Fee and Health Network Fee.

Step 2 – Sponsor Invoice – Billing Department cont'd

While Reviewing and Editing Students on your SI you notice a change is needed or a student was missed.

- ▪ **Student amount needs to be Edited or Deleted from the Invoice:** Please email the Portal email as needed
    1. Go to the Student Lookup Screen and search for said Student via CSU ID number
    2. Once student has populated with their department and coverage:
        - • Hit the **Delete Button** to delete the student.
        - • Hit the **Edit Button** to edit the student's coverage. The CONTRACT DESC will populate a drop down, please select the appropriate student coverage change.

Please Enter CSU ID:	836074716	Submit	Term:	202410 ▾						

		STUDENT ID	STUDENT NAME	SPONSOR ID	SPONSOR NAME	SELECTION TYPE	CONTRACT NUMBER	CONTRACT DESC	AMOUNT	CONTRACT STATUS	Fee CONTRACT NUMBER
Edit	Delete	836074716	Fletcher-Ruyle, Miles	825437467	NR - Fish & Wildlife Conservation Biology	GA	26	.25 FTE PARTIAL FEES		PROCESSED	21

- ▪ **Intended student does not appear on the Invoice:**
    1. Search for their name via the Student Lookup screen. If they do not populate, please proceed with uploading the student as they were missed in the original upload. It will take roughly 2 days for the charges to then transfer off the student account and onto the departments. We will bill the department for the late addition on the second round of invoicing or the following semester.

Please note that this is a manual process done by ARO to remove the student so this will not reflect right away on the invoice. If a department is increasing the coverage of a student, this may not reflect until the second bill.

Step 2 – Sponsor Invoice – Billing Department cont'd

Department Approval

1. After accounting information has been validated, click the DEPT RVW check box for all students being covered.
   - This box <u>must</u> be checked for all students on the invoice for the Approve button to activate and to move forward in the process.
   - Department reviewed students can be hidden by clicking on the Hide Dept Reviewed Students check box.
     - This is especially helpful for departments with many students being covered.
2. Click on Approve to route the invoice to Fiscal Officer and Delegates of the specific Kuali (KFS) Accounts.

Step 2 – Sponsor Invoice – Billing Department cont'd

Status Table

This table is used to track the progress of the invoices as it progresses through the various stages of processing. After the department user clicks Approve, the Dept Submit Date will populate a time stamp. After each approval during the invoice routing, the submit date at each level will populate the appropriate time stamp.

Step 2 – Sponsor Invoice – Billing Department cont'd

Fiscal Officer Approval Cont'd

If corrections are necessary, it is important to use the Comments field to communicate what needs to be fixed.

Declined – notice once the Fiscal Officer or Delegate Declines an Accounting Line, the FO NetID fills in, but the FO APPR box does not get checked.

Approve – notice once the Fiscal Officer or Delegate Approves an Accounting Line, the FO APPR box gets checked and the FO APPR NetID fills in. Approval can be obtained by checking the FO APPR box or the accounting line(s) in the Invoice Summary Table.

Step 2 – Sponsor Invoice – Billing Department cont'd

Fiscal Officer Changes

- Communication between department users and Fiscal Officers/delegates is crucial – please use the comment section for communication.
- Comments can be entered in the Edit Screen or on the invoice directly.

1. Select Edit of desired student and continue to the popup screen to enter accounting information.
2. Fiscal Officers can only Edit their accounting lines if it is being edited to another account that they are a Fiscal Officer on in KFS.
   - If you try to edit to an account number you are not a fiscal officer on, you will see an error.

Step 2 – Sponsor Invoice – Billing Department cont'd

Fiscal Officer Notifications

Action Required - Department Invoice Corrections Needed

To   ● Chacon,Kim; ● Offord,Angie
Cc   ○ Hanson,Greg

You are receiving this email because the fiscal officer or a delegate on one or more accounts has requested that corrections be made on the department sponsored student invoice and the pending invoice is awaiting corrections.

To make corrections to this invoice please log in to Sponsor Billing using your ename and password, view the comments provided by the fiscal officer/delegate, make the appropriate changes and resubmit the invoice. The invoice will then be rerouted to the fiscal officer for approval.

Please contact Accounts Receivable at 970-491-3419 or reply to this email if you experience difficulties accessing the denied invoice or have additional questions. You may also reference the User Guide located under the SPONSOR BILLING heading for instructions on how to use the portal.

Thank you,

ARO Sponsor Billing

Bill Date	Sponsor Id	Dept Name
10/10/2019	832852840	FO - NR - Cooperative Fish & Wildlife Research Unit - GRA-Predoc

A notification is emailed when corrections need to be made by the Department User.

After Corrections are made the invoice will be routed to any unapproved account's Fiscal Officers and/or Delegate.

- Delegate Approved Department Invoice

To   ■ Chacon,Kim
ℹ️ If there are problems with how this message is displayed, click here to view it in a web browser.

You are receiving this email because the delegate on one or more of your departmental accounts has approved the department invoice for FO - ADMIN - Graduate School - 825436396. To review the portion of this approved invoice please log in to Sponsor Billing using your ename and password and click on the Sponsor Invoice link under the SPONSOR BILLING heading.

Please contact Accounts Receivable at 970-491-1368 or reply to this email if you experience difficulties accessing the invoice or have additional questions.

Thank you,

ARO Sponsor Billing

Invoices

Bill Date	Sponsor Id	Dept Name
02/13/2017	825436396	FO - ADMIN - Graduate School

Notification sent to Fiscal Officer when a Delegate has approved assigned accounts within the Invoice.

A follow up email will be generated as a reminder, if not Approved/Declined within 24 hours.

Step 2 – Sponsor Invoice – Billing Department cont'd

Notification to the Grad School when Fiscal Officer and/or Delegates have approved all accounts on the invoice

ACTION REQUIRED - Department Invoice Batch Approval Pending

BA   BFS_ARO_Portal <BFS_ARO_Portal@mail.colostate
      To ⊞ BFS AR_Sponsor_Grad

☺ ← Reply   ← Reply All   → Forward   📑   ⋯
                                    Tue 1/3/2023 1:07 PM
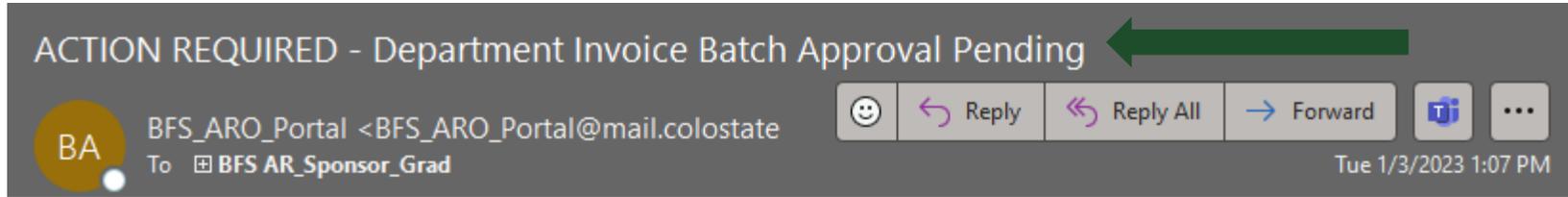
A department approved invoice for FO - VM - Microbio-Immun-Pathology - GRA-Predoc - 825437971 has been submitted for Graduate School review. To approve or decline the invoice please log in to Sponsor Billing using your ename and password and click on the Sponsor Invoice link under the SPONSOR BILLING heading.

Please contact Accounts Receivable at 970-491-3419 or reply to this email if you experience difficulties accessing the invoice or have additional questions. You may also reference the User Guide located under the SPONSOR BILLING heading for instructions on how to use the portal.

Thank you,

ARO Sponsor Billing

Bill Date	Sponsor Id	Dept Name
11/29/2022	825437971	FO - VM - Microbio-Immun-Pathology - GRA-Predoc

Colorado State University

Step 2 – Sponsor Invoice – Billing Department cont'd

Grad Approval

1. Once the invoice routes to the Graduate School, the Grad Role will need to be selected and each student will need to be reviewed.
2. The check box will need to be selected for each students Tuition and/or Fee line items which will fill in the GRAD RVW box and the GRAD NetID will populate.
3. Upon completion of the review, the Grad Approve or Decline buttons will become active and dark blue so the invoice can move forward or be sent back to the department.
   - It is important for the Grad School to place notes in the Comments for any changes needed.

The Graduate School cross references the student's status in Oracle, verifies the Object Codes inputted on the Sponsor Invoice are correct, and if the student is TP eligible.

Step 2 – Sponsor Invoice – Billing Department cont'd

Grad Fiscal Officer Approval

- Once approved by the Grad School and when there is a TP Account being used, and/or the accounts used for the Mandatory Fee coverage the invoice is routed to the Grad Fiscal Officer and will need to be Approved or Declined.
  - This also applies to GTA Accounts.
- If Approved, the Grad Fiscal Officer Submit date will fill in.
- If Declined, the invoice will route back to the department for corrections.
- If there are no TP or GTA accounts on the invoice the Grad Fiscal Officer Submit Date will reflect N/A in the status table, and the invoice will route from the Grad Role to the Final Grad Fiscal Officer Submit Date.

Step 2 – Sponsor Invoice – Billing Department cont'd

Final Grad Fiscal Officer Approval

- Once the Grad Fiscal Officer Submit Date is completed in the Status Table and the Grad Fiscal Officer Role is selected, the Grad FO Approve and Grad FO Decline Buttons will become dark blue and active.
- This is the Graduate School's method of approving the entire invoice.

Step 2 – Sponsor Invoice – Billing Department cont'd

Finalization of Invoice

Sponsor Invoice

Invoice Date: 11/29/2022   [Export To Excel]   [Print]

Status: Ready..

Invoice Date: [11/29/2022 ▼]   [AG - Horticulture Landscape Architecture ▼]

Dept Submit Date: 11/30/2022 8:02:10 AM
Fiscal Officer Submit Date: 12/6/2022 6:52:57 AM   Sponsor Billing Status:
Grad Submit Date: 12/7/2022 3:28:41 PM
Grad Fiscal Officer Submit Date: N/A – no TP accounts identified on invoice
➤ Final Grad Fiscal Officer Submit Date: 12/9/2022 3:24:06 PM
Invoice Total: $11,708.10

[--- Select Role --- ▼]   Current Role: --- Select Role ---

Hide Dept Reviewed Students: ☐ Hide Reviewed Grads: ☐ Hide Invoice Details: ☐ Show Declined Accounts: ☐

- Sponsor Invoice is complete once the Final Grad Fiscal Officer Submit Date has been populated.
- Once Final Grad Fiscal Officer is complete, no additional edits can be made to that invoice in the Portal.
  - A KFS Entry, GLT or DI, will need to be created for any changes that may need to be made to account numbers or object codes.

Colorado State University

Step 2 – Sponsor Invoice – Billing Department cont'd

Final Invoice Approval Notification

A department invoice has been approved by the Graduate School for GRAD FO - NR - Cooperative Fish & Wildlife Research Unit - GRA-Predoc - 832852840. Please log in to Sponsor Billing using your ename and password and click on the Sponsor Invoice link to download or print a completed version of the invoice. The invoice has been routed to Accounts Receivable Operations for final processing.

Please contact Accounts Receivable at 970-491-1368 or reply to this email if you experience difficulties accessing the invoice or have additional questions. You may also reference the User Guide located under the SPONSOR BILLING heading for instructions on how to use the portal.

Thank you,

ARO Sponsor Billing

Bill Date	Sponsor Id	Dept Name
10/10/2019	832852840	GRAD FO - NR - Cooperative Fish & Wildlife Research Unit - GRA-Predoc

- Once the Graduate Fiscal Officer has Approved the entire invoice an email will be sent to the Department Users and Fiscal Officers of the Accounts used letting them know the invoice is now final and resided in ARO.

- The corresponding KFS Accounts and Object Codes are converted from the Invoice into our Sub-Ledger system, Banner, and Detail Codes are created to now pay the Department Account.

Colorado State University

Step 2 – Sponsor Invoice – Billing Department cont'd

Obtaining a copy of the final invoice for Department record's – Exporting Invoice to Excel

Step 1 – Click on Export to Excl

Step 2 – Double Click on Sponsor Billing Icon or Click Open

Step 2 – Sponsor Invoice – Billing Department cont'd

Obtaining a copy of the final invoice for Department record's – Printing Invoice

Step 1 – Click on Print
Step 2 – Adjust printing setting to your desire in the pop-up Print browser, hit Print

- You may also right click anywhere on the Invoice to print
- Preferred method is to Print to a PDF and print a hard copy from the PDF

Your Departments Invoice is now Complete!

o Please note that department invoicing occurs **two** times a semester.
   o If you happen to miss uploading a student to the Portal and first invoicing has occurred, this upload will pick up on the second invoice later in the semester or the first invoice for the following semester.
   o Any activity on the student's account that has occurred after the first round of invoicing will pick up on the second invoice.
o Please communicate with us with any questions, concerns, and/or unique situations a student may have so we can best advise you. We are here to help!
   o BFS_ARO_PORTAL@Mail.ColoState.edu