



Payments to Students

PCBO

October 6, 2026

Stipend?



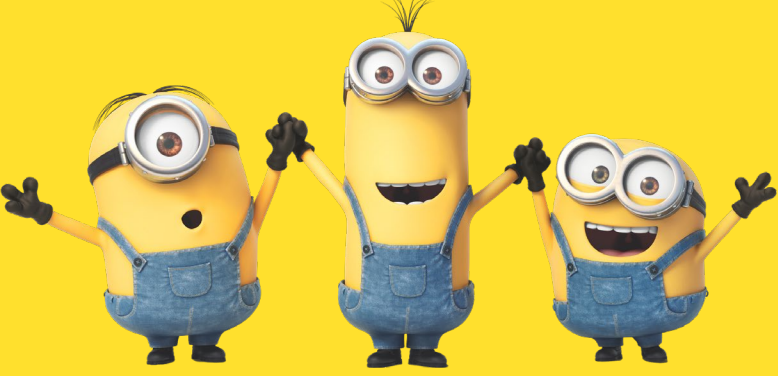
Corporate needs you to find the differences between this picture and this picture.



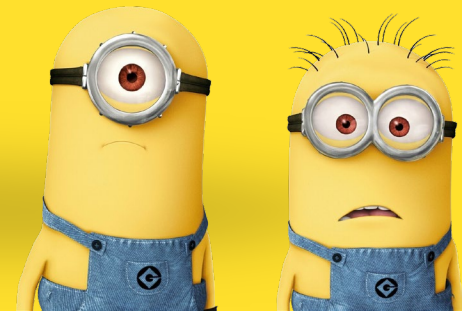
They're the same picture.



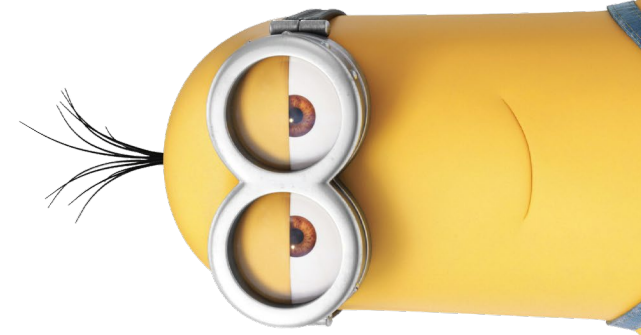
Payment!



The Four Payment Categories



Four Payment Categories



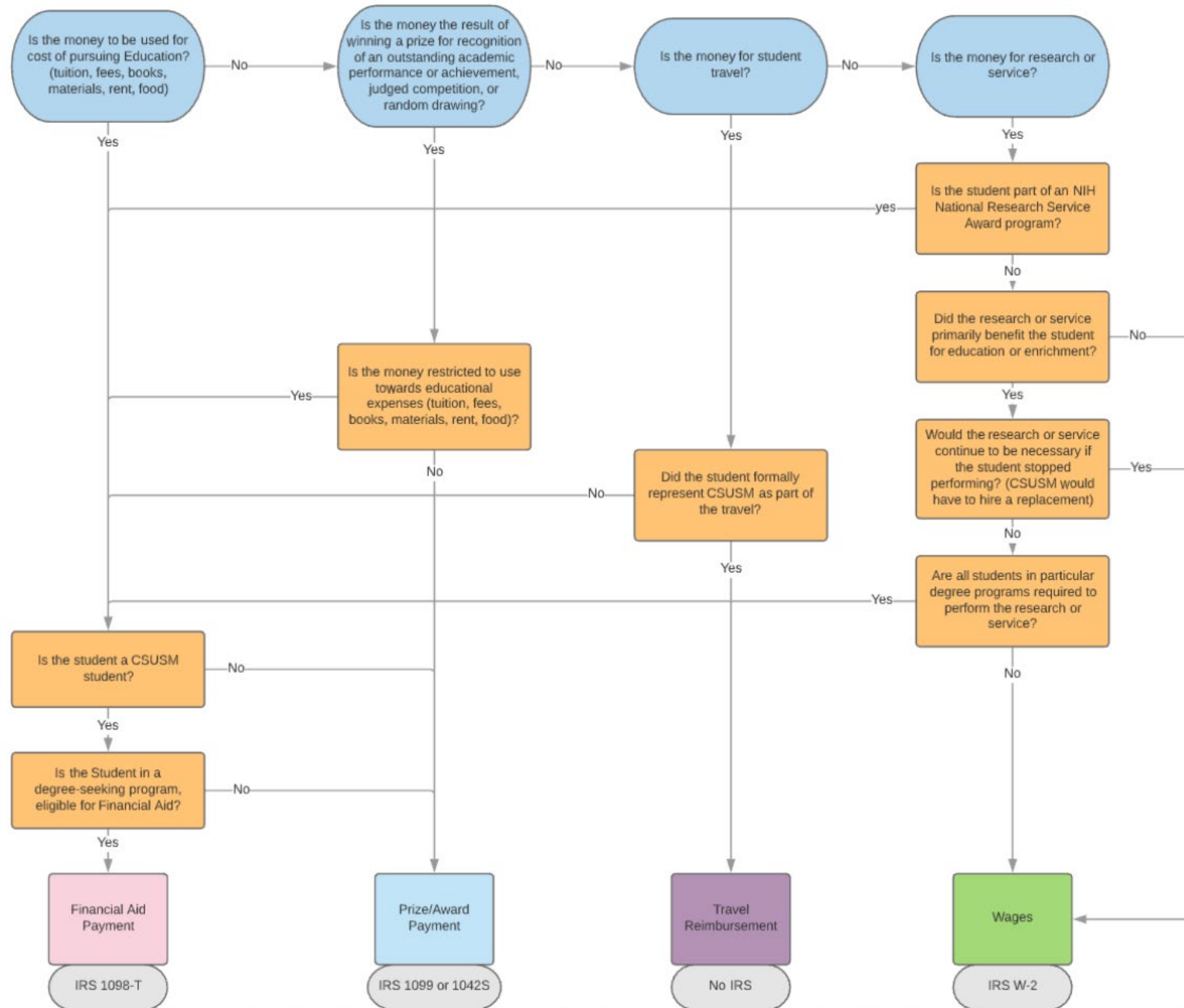
Financial Aid: Both qualified expenses (tuition, fees, books, equipment necessary for a course) or non-qualified expenses (room and board, transportation, medical expenses) fall in this category

Wages: Payments representing compensation for services rendered where the university is the primary beneficiary (question to ask: if the student quit, would you have to hire someone else to do the work?)

Travel Reimbursement: Payments reimbursing travel when the student is formally representing the university (presentation, speech, recruitment); if the student is traveling for the experience (i.e. conference/workshop) and not formally representing the university, it would be financial aid

Award/Prize: Payments for winning a prize or an award (not to be confused with scholarship) where the monies are not required to go towards educational expenses; If they are required to pay educational expenses, it would be financial aid

Payments to Students Decision Tree



Resources

csusm.edu/sfs/policies/staff/index.html

CSUSM

Student Financial Services

Tuition & Fees Payment & Deadlines Procedures & Forms Financial Aid & Refunds Fee Waivers Parent & Tax Info Financial Literacy

HOME // Policies, Procedures & Forms // Staff Procedures

Staff Procedures

PROCEDURES & FORMS

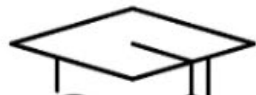
- Student Account Policies
- Staff Procedures**
- Staff Forms

Student Financial Services
(760) 750-4490
sfs@csusm.edu
Monday - Friday, 8:00 AM - 5:00 PM

 University Cash Handling

 Systems Work Requests (PeopleSoft & Transact)

 Payments to Students









Resources

csusm.edu/sfs/payments_to_students_guide/pts_guide_0.html

CSUSM

Student Financial Services

Tuition & Fees Payment & Deadlines Procedures & Forms Financial Aid & Refunds Fee Waivers Parent & Tax Info Financial

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Payments to Students Guide

Resources to assist CSUSM staff in processing and reporting any of the four acceptable categories of payments to a student:

- Financial Aid
- Wages
- Travel Reimbursement
- Prize/Award

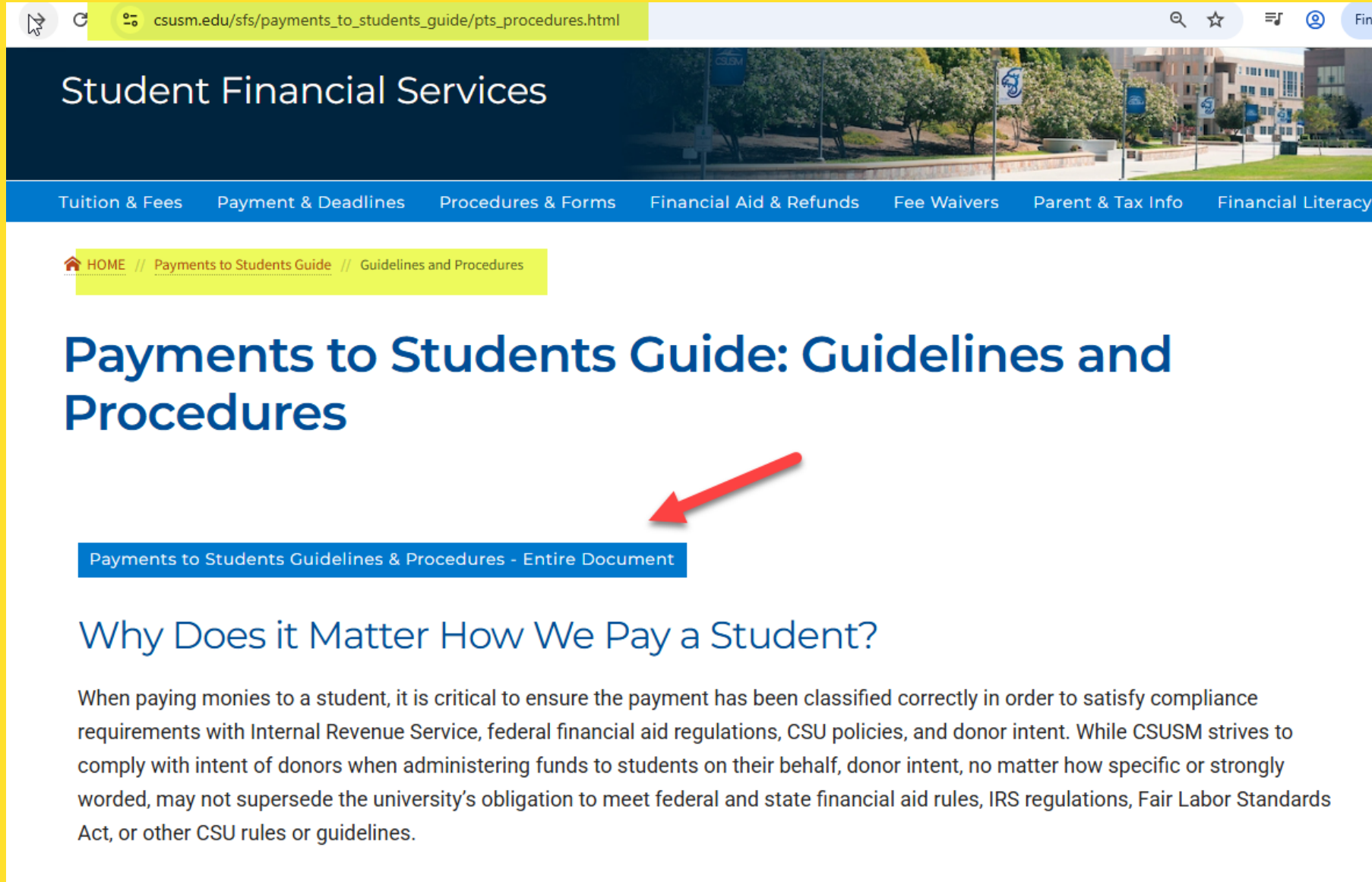
Determine Payment Category

Guidelines & Procedures



Resources

https://www.csusm.edu/sfs/payments_to_students_guide/payments_to_students_guidelines_procedures.pdf



The screenshot shows the Student Financial Services website. The header includes the site name and a navigation menu with links like Tuition & Fees, Payment & Deadlines, Procedures & Forms, Financial Aid & Refunds, Fee Waivers, Parent & Tax Info, and Financial Literacy. The breadcrumb trail indicates the current location: HOME // Payments to Students Guide // Guidelines and Procedures. The main heading is 'Payments to Students Guide: Guidelines and Procedures'. Below this, a blue button labeled 'Payments to Students Guidelines & Procedures - Entire Document' is highlighted with a red arrow. The section 'Why Does it Matter How We Pay a Student?' follows, with a paragraph explaining the importance of correct payment classification for compliance with IRS, federal financial aid, CSU policies, and donor intent.

Student Financial Services

Tuition & Fees Payment & Deadlines Procedures & Forms Financial Aid & Refunds Fee Waivers Parent & Tax Info Financial Literacy

HOME // Payments to Students Guide // Guidelines and Procedures

Payments to Students Guide: Guidelines and Procedures

[Payments to Students Guidelines & Procedures - Entire Document](#)

Why Does it Matter How We Pay a Student?

When paying monies to a student, it is critical to ensure the payment has been classified correctly in order to satisfy compliance requirements with Internal Revenue Service, federal financial aid regulations, CSU policies, and donor intent. While CSUSM strives to comply with intent of donors when administering funds to students on their behalf, donor intent, no matter how specific or strongly worded, may not supersede the university's obligation to meet federal and state financial aid rules, IRS regulations, Fair Labor Standards Act, or other CSU rules or guidelines.



Resources

→ ↻ 📄 csusm.edu/sfs/payments_to_students_guide/pts_guide_1.html

CSUSM

Student Financial Services

Tuition & Fees Payment & Deadlines Procedures & Forms Financial Aid & Refunds Fee Waivers P

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Payments to Students Guide

Payments to Students: Determining Payment Type

Is the payment to assist with student's pursuit of education?

Yes No

Direct Educational Expenses

Direct educational expenses are expenses that a typical CSUSM student incurs, including:

- Tuition
- Fees (Mandatory Campus Fees, Course Fees, User Fees)
- Room (Housing or off-campus rent)
- Board (Food, on-campus or off-campus)



Takeaways

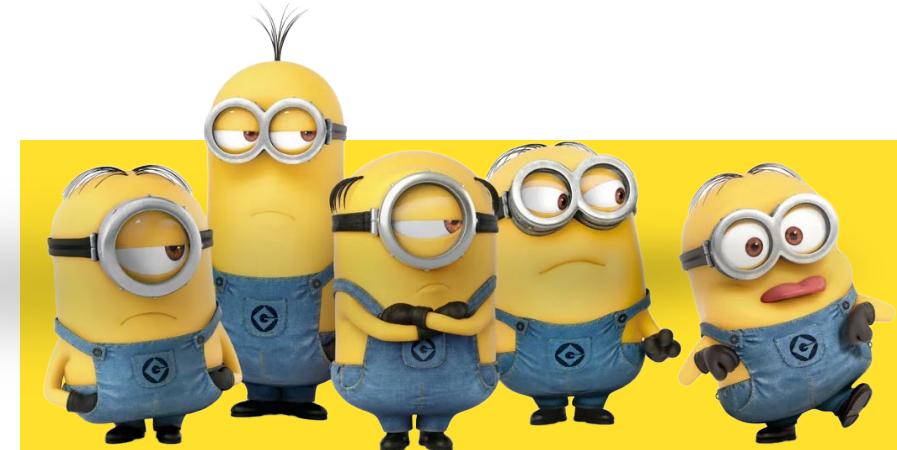
The majority of payments will be classified as Financial Aid

Financial Aid payments are a good thing (reducing loans is a good thing, and not getting a 1099 tax form is a good thing!)

FROM JULIE: In most cases, regardless of funding source or purpose, a payment provided to a student is considered financial aid and must be reviewed accordingly (primary exception being wages or travel reimbursement).

Attempting to route a student payment through AP, rather than the financial aid process does not change the requirement for review. FA Office is required (for compliance) to review these payments and make adjustments when necessary.

It is important that Financial Aid payments are processed through the appropriate channels to avoid delays and compliance concerns.



Questions Regarding a Payment to Student?

The Payments to Students brain trust:

Jason Drake – Student Financial Services

Julie Lindenmeier – Financial Aid

Connie Lizaola - Payroll





Thank You

