

UC Santa Barbara  
Policies  
Issuing Unit: Student Affairs

Policy 4440  
Date: February 1, 1985

COORDINATING FINANCIAL  
ASSISTANCE INFORMATION

I. PURPOSE AND SCOPE:

This procedure describes the responsibilities and steps necessary to record and coordinate all student financial assistance through the campus office of Student Financial Services, including those funds paid through University Books of Account and those received by the student from outside agencies and designated for educational purposes.

II. REFERENCES

- A. President Hitch's memorandum to Chancellor Cheadle, dated July 17, 1970.
- B. UCSB Policies Manual, Policy 4425, Financial Aid Administration.

III. PROCEDURE:

As appropriate, information will be either submitted to Student Financial Services or made available to that office through inclusion in common information systems, as follows:

A. Funds paid through the University Books of Account:

1. Departments/Committees:

When an award is approved from any funds paid through the University Books of Account, such as grants or fellowships, when a student is employed in a non-college work-study position, and also when employment which is based on a contract agreement, i.e., teaching or research assistantships, is begun, the Department/Committee will prepare Attachment A and send it to Student Financial Services at the time the award is made. This must be an ongoing procedure throughout the academic year.

2. Budget Office:

The Budget Office will notify Student Financial Services of the total allocation of teaching assistantships by school/college. This information normally will be available in mid-June.

3. Graduate Division:

The Graduate Division will report their awards utilizing Attachment A and will make available copies of their detailed ledger which indicates to whom the award is made, total amount of award, and the amount paid to date, if necessary; this information will be sent monthly.

4. Accounting Office:

The Accounting Office will supply monthly to Student Financial Services a copy of the Summary Ledger.

5. Student Financial Services:

Student Financial Services will audit the general information and total amounts received from the office indicated above and balance them with the individual input received from the Departments/Committees (paragraph III.A.).

B. Funds for Educational Purposes Paid to Students from Outside Agencies.

1. Registrar:

The Registrar's Office will be responsible for identifying those students receiving Social Security Benefits.

2. Dean of Students:

Will use Attachment A to report any offset of fees made for students from outside agency sources.

3. Accounting Office:

Will supply copies of any offsets made for students from outside sources.

IV. ATTACHMENT:

A. Financial Aid Reporting Form

Please direct questions about these policies to [Meta.Clow@vadmin.ucsb.edu](mailto:Meta.Clow@vadmin.ucsb.edu). For questions or comments regarding the format of the above information, please contact [webcontact@ucsbuxa.ucsb.edu](mailto:webcontact@ucsbuxa.ucsb.edu).

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