



June 1, 2026

# UCLA Student Payment Guide and FAQ

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## Student Payment Guide

This guide summarizes how UCLA processes student payments and scholarships. Payments to students must follow specific university and federal rules to ensure compliance, accuracy, and fairness. There are six primary systems used:

1. **Bruin Financial Aid (BFA)**: Used for student scholarships, fellowships, and stipends.
2. **UCPath**: Used to pay students for work (jobs).
3. **Concur**: Reimburses students for official UCLA travel.
4. **BruinBuy Plus**: Used for special cases like non-UCLA students or contest awards.
5. **Research Pay Portal**: Used to give research participants cash or gift card payments.
6. **Blackbaud Award Management (BAM)**: Supports scholarship application processes, award selection processes, and stewardship

### Important Guidelines:

- Always process awards through proper UCLA systems.
- Avoid late entries—late awards can reduce other aid and confuse students.
- Use placeholder awards when the funding source is not yet finalized.
- Be cautious with donor intent—federal law overrides it.
- Awards to students after graduation or during summer periods of nonenrolment must be justified.
- Coordinate early with UCLA Financial Aid & Scholarships (FAS).

### Key Terms:

- **Scholarship**: Educational gift aid, usually for undergraduates.
- **Fellowship**: Gift aid, usually for graduate students.
- **Tuition Award**: A scholarship restricted to pay tuition only.
- **Restricted/Unrestricted Aid**: Some awards are limited in use (e.g., tuition only), while others can be used more broadly.

### Tax Notes:

- Most scholarship/fellowship awards are taxable if not used for tuition, fees, or required books and supplies.
- UCLA issues 1098-T tax forms for eligible students annually.

If unsure or questions always contact: [UCLAScholarships@fas.ucla.edu](mailto:UCLAScholarships@fas.ucla.edu)

## **UCLA Student Payment Guide Frequently Asked Questions (FAQs)**

### **Why must departments follow correct payment processes for students?**

Failure to follow appropriate processes may violate federal and state law, donor intent, and institutional policies. It can also result in tax implications for students and compliance penalties for UCLA.

### **How do federal aid rules affect institutional awards?**

Students receiving federal financial aid cannot receive total aid exceeding their Cost of Attendance (COA). Exceeding this cap is called an 'over-award' and must be corrected, often by reducing loans first.

### **What are best practices for scholarship awarding timing?**

Award prospective students by **March 1** (freshmen) and **April 1** (transfers). Process continuing student awards by **August 31** to prevent over-awards and delays.

### **Can students receive graduation prizes or awards after graduation?**

The Bruin Financial Aid system makes it difficult to award funds to a student after graduation because the student is technically no longer a student. Awards must still be attributed to the Spring graduation term and cannot exceed student cost of attendance without creating over-award adjustments per regulations. Graduation awards and prizes should be made before the end of the Spring term if at all possible. Always consult FAS if questions or seeking exception processing.

### **Can students receive awards during the summer when not enrolled?**

The Bruin Financial Aid system makes it difficult to award funds to a student who is not enrolled. These scenarios are discouraged but may be allowable if justified. Awards must still be attributed to the nearest term of enrollment per regulations unless the funds are for specific summer costs (i.e., a summer research experience). Some units mistakenly believe they can make awards in summer during a period of non-enrollment so that the award does not count against financial aid limits, but regulations are clear this is not allowed. Consult FAS if questions.

### **What are placeholder awards and when are they used?**

Placeholder awards represent scholarship commitments before the exact funding source is determined. These should be updated with final sources by August 31 to avoid delays in disbursement.

### **Why is award renewability important for undergraduate?**

Renewable awards (four years for first year's and two years for transfers) help students plan for college costs, reduce financial anxiety, and improve retention.

### **What does BAM (Blackbaud Award Management) do?**

BAM is a centralized scholarship platform that simplifies application, review, awarding, and stewardship. It helps departments manage their funds while providing students with a streamlined experience.

### **How can departments avoid triggering over-awards?**

Enter awards into BAM or report via scholarship upload forms early in coordination with FAS. After September 1 check with FAS on potential problems before trying to make awards.

### **What if a student needs extra funding not covered in their aid package?**

Students can appeal to increase their COA for expenses such as higher living expenses, travel expenses, supply expenses, etc. All appeals are evaluated by UCLA Financial Aid & Scholarships (FAS) team.

### **Where can I get help with awarding scholarships?**

UCLA Financial Aid & Scholarships hosts virtual office hours nearly every Tuesday from 10–11 AM. Email questions to: [UCLAScholarships@fas.ucla.edu](mailto:UCLAScholarships@fas.ucla.edu)

## **What are the consequences of awarding funds to students outside of the BFA system and other UCLA payment systems?**

Doing so is not compliant with federal aid regulations, and may cause taxation issues for students. It also risks institutional penalties and hinders proper reporting on the 1098-T tax forms.

## **What is considered a non-scholarship prize and how should it be processed?**

A non-scholarship prize is a payment not intended to support education, not restricted to students, and not used for tuition or academic expenses. These must be processed through UCLA Accounts Payable and are considered taxable income.

## **What is the difference between restricted and unrestricted gift aid?**

Restricted gift aid can only be used for specific costs like tuition. Unrestricted aid can be applied to any educational expense. Both count toward financial aid eligibility and must be recorded in BFA.

## **How should departments monitor compliance with donor intent and financial aid rules?**

Departments must verify that spending aligns with gift agreements, monitor fund balances, and ensure that awards are submitted in accordance with FAS guidance. Donor intent cannot override federal law.

## **What should departments know about University of California/UCLA Education Financing Model?**

This model emphasizes affordability and minimizing student debt. Scholarship strategies should align with this approach by focusing on early awarding, need-based priorities, and renewable funding.

## **How can departments address bias in scholarship selection?**

Committees should be trained to recognize implicit and explicit bias, avoid relying solely on GPA or test scores, and diversify selection criteria to ensure fairness.

## **What is the university-wide giving deadline for scholarship funds?**

Donations received by December 31 should be used for the following academic year. Contract and grant funding may qualify for a June 30 exception. Late awards require justification and review by FAS leadership.

## **Federal Regulatory Citations\***

The following federal regulations and guidance inform UCLA student payment administration:

[Title IV Student Financial Assistance Regulations \(34 C.F.R. Part 668\)](#)

[Student Assistance General Provisions and Over Award Requirements \(34 C.F.R. § 673.5\)](#)

[Uniform Administrative Requirements, Cost Principles, & Audit Requirements for Federal Awards \(2 CFR Part 200\)](#)

[Higher Education Act – Cost of Attendance and Professional Judgment Provisions](#)

[Internal Revenue Code §117 – Qualified Scholarships](#)

[IRS Publication 970 – Tax Benefits for Education](#)

\* Note that federal regulations and guidance are updated periodically. UCLA policy may be more restrictive than federal minimum requirements. Departments should consult FAS when questions arise regarding student eligibility, over awards, enrollment requirements, tax implications, or the administration of scholarship and fellowship funds.