



PAYMENT REQUEST FORM FOR STUDENT AID RECIPIENTS

Not for services rendered

UNIVERSITY of HAWAII*
FOUNDATION

*Allow two weeks for processing**

PAYMENT INFORMATION

UHF Account # _____ Title: _____

Academic Year: _____ Total Award \$ _____ Scholarship Fellowship* Grant
 Award Reimbursement

*Please indicate below if for cost of attendance (e.g. tuition, books, fees, etc.) or research related costs toward degree. For costs of attendance, payment is paid through student Banner account. For research, UHF will process a check to student.

Payment: Year (split payment; Fall & Spring) Fall Only Spring Only Summer Only

APPLICANT INFORMATION

Name: _____
Last First M.I. Mr/Mrs/Ms

Address: _____ UH Student Banner ID: _____

(If Non-UH Student please provide SSN: _____)
Country: _____ Phone #: (_____) _____

E-mail address: _____ Primary UH Campus: _____

For non-scholarship payment only:

US citizen: Yes No

If no, please mail or file drop UHF Form F008 Foreign National Information, WH-1, IRS Form W-8BEN Certificate of Foreign Status, copy of passport I.D. page, copy of visa, and copy of I-94 Arrival/Departure Record (front & back). **F-1** visa holders must include copy of I-20 Certificate of Eligibility for Nonimmigrant (front & back). **J-1** visa holders, include a copy of IAP-66. **Resident aliens not updated in the UH System:** please send green card or official documents confirming your immigration status.

Mailing address for tax form: _____

Indicate if for Travel/Program Expenses/Award Type/Other Information: _____

For amounts \$3,000 and over, please provide 2 signatures

Authorized Signature: _____ Date: _____

Authorized Signature: _____ Date: _____

DISPOSITION OF CHECK (check one) Forward Check To: Call/Hold Check For:

Name: _____ Phone: _____

Dept/Address: _____ UHF Approval _____

**Please note that scholarship payments are disbursed into students' Banner accounts 10 days prior to start of term*

FISCAL USE

V _____ Object Code _____ Relate Code _____ Addr _____ Sep Chk Amount _____

Description: _____ Invoice Date _____ Due Date _____

INFORMATION REGARDING STUDENT AID TAXABILITY

DEFINITION OF STUDENT AID:

Scholarship - An amount paid to or for the benefit of a student enrolled at an educational institution to aid in the pursuit of studies (e.g. tuition, books, fees, etc.).

Fellowship - An amount paid to or for the benefit of a student enrolled at an educational institution to aid in the pursuit of study or research (e.g. tuition, books, fees, etc. or travel supplies needed to conduct research relative to their degree). Usually for a graduate student.

Award - Recognition for some sort of outstanding achievement, special skill/knowledge, or can represent an award/prize won in a contest. Awards are for past accomplishment and are not required to be used for educational purposes.

Grant - Recognition of special skill/knowledge, proposal, presentation, in a specific area of study, or for travel to conduct studies.

Student Travel Reimbursement - An amount paid to or for the benefit of a UH student to aid in the pursuit of study or research, or to pay for materials, travel, etc. (Paid after as a reimbursement.)

TAXABILITY:

Award/Grants - All awards and grants are taxable and reportable.

US Citizens or Resident Aliens receiving single or aggregate awards of \$600 or more will receive an IRS Form from the UH Foundation at calendar year end for filing with their income tax return.

*Nonresident Aliens will be subject to a thirty percent (30%) tax withholding on **all** awards/grants, regardless of tax treaty benefits.*

Scholarship/Fellowship - A scholarship or fellowship is tax-free only if you are a candidate for a degree at an educational institution **and** if the grant or scholarship is a qualified scholarship or fellowship. A qualified scholarship or fellowship is defined as amounts received for tuition and fees paid to enroll in, or to attend, an educational institution, or fees, books, supplies, and equipment that are required for the courses at the educational institution.

US Citizen and Resident Alien expenses above their cost of attendance budget, including room, board, travel, etc., are taxable. Also, any amount given to a student who is not enrolled in a degree program is taxable. Although you will not receive a tax form from the UH Foundation for your scholarship/fellowship, you will be required to report taxable amounts on your income tax return. For more information, please see IRS Publication 970 Tax Benefits for Education or contact your tax advisor.

Nonresident Aliens--If there is no tax treaty between the United States and your country of residence, the University will issue payment back to you after a required 14% withholding tax is deducted. The University will issue IRS Form 1042-S for any scholarship or fellowship received which can be filed with your income tax return. For more information, please see IRS Publication 515 U.S. Withholding of Tax on Nonresident Aliens and Foreign Entities or contact your tax advisor.