



**PAYMENT REQUEST FORM FOR STUDENT AID RECIPIENTS - CONCUR**  
*Not for services rendered*

UNIVERSITY of HAWAII\*  
 FOUNDATION

*Allow two weeks for processing\**

**PAYMENT INFORMATION**

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

\*If marking Fellowship, please indicate on line 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

If student will be submitting forms for ACH payment, please check box:

**APPLICANT INFORMATION**

Name: \_\_\_\_\_ Primary UH Campus: \_\_\_\_\_  
           Last                                  First                                  M.I.                                  Mr/Mrs/Ms

Address: \_\_\_\_\_ UH Student Banner ID: \_\_\_\_\_

\_\_\_\_\_ (If Non-UH Student, please send SSN through [ShareFile](#))

\_\_\_\_\_ Country: \_\_\_\_\_

E-mail address: \_\_\_\_\_ Mobile Phone #:\*\* (\_\_\_\_\_) \_\_\_\_\_

*\*\*May receive occasional text from University of Hawaii and University of Hawaii Foundation.*

Mailing address for tax form: \_\_\_\_\_

**For non-scholarship payment only:**

US citizen:  Yes  No

**If no**, please mail or use the [Share File Link](#) to provide the following forms: UHF Form F008 Foreign National Information, 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.

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

\_\_\_\_\_



**DEFINITIONS FOR STUDENT AID:**

**Scholarship** An amount paid to or for the benefit of a student enrolled at an educational institution to aid in the cost of attendance (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. Fellowships can be either Scholarship, Grant, or both.

**Award** Recognition for special achievement, special skill/knowledge, or prize such as winning a contest. Awards are for past accomplishment and are not required to be used for educational purposes.

**Grant** Funding for research, supplies, travel to conduct studies or present student's research, or other required support to assist student's academic pursuits, using their special skill/knowledge, proposal, presentation, in a specific area of study.

**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, per proof of original payment/receipt.)

**Qualified Education Expenses** For the purposes of tax-free scholarships and fellowships: Amounts paid for tuition and fees required to enroll/attend and course related expenses such as fees, books, supplies, and equipment (if required of all students in the course of instruction).

**TAXABILITY:**

**Non-taxable (Excludable from student income)**

- Scholarships/fellowships that are used for Qualified Education Expenses
- Reimbursements for expenses incurred on behalf of the University

**Taxable (Includable in student income)**

- Prizes and awards
- Funding (including reimbursements) provided for non-qualified education expenses such as
  - Room & board or personal expenses
  - Travel, including the cost to attend a conference, internship, or job interview
  - Research
  - Equipment and other expenses that are not required for enrollment or attendance at an eligible education institution.

Those receiving payments may receive an IRS Form and/or a courtesy letter from the UH Foundation at calendar year end for filing with their income tax return. *For more information, please see IRS Publication 970 Tax Benefits for Education or contact your tax advisor.*

*Nonresident Aliens will be subject up to a thirty percent (30%) tax withholding on ALL taxable student aid payments (including reimbursements) regardless of tax treaties. The UH Foundation will issue IRS Form 1042-S 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.*