



PAYMENT REQUEST FORM FOR STUDENT AID RECIPIENTS - CONCUR

Not for services rendered

UNIVERSITY of HAWAI'I*
FOUNDATION

*Allow four weeks for processing**

PAYMENT INFORMATION

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

*If marking Fellowship, please indicate on the line 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 the 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:

By checking this box, I certify that this payment request is for study, training, or research for the student's own studies for their degree not on behalf of the University or for another purpose.

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 or Resident Alien: Yes No

If no, student will receive an email from GLACIER to fill out international information. All paperwork needed by GLACIER must be completed and returned via mail or our [Share File Link](#) before payment can be made. If submitting electronically, proof of signature document must be attached.

Resident aliens not updated in the UH System: please send green card or official documents confirming your immigration status directly through our [Share File Link](#)

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).

Please note that all forms of student aid payments can potentially affect your Financial Aid Package. If any concerns, please reach out to your campus Financial Aid Office

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.