

Purpose of this Form: To process the payment of non-qualified scholarship or fellowship to a student. A scholarship or fellowship is a payment made to a student to aid in the student's education. A scholarship or fellowship is non-qualified if it is NOT used (i) to pay the university's tuition or (ii) for books, fees, and/or equipment required for enrollment in a class at the university.

Examples of non-qualified scholarship or fellowship payments include funding for: room and board, travel, equipment, parking, or other items not required for enrollment in a course of instruction at the university.

The university is not required to report non-qualified scholarship or fellowship payments made to U.S. citizens or U.S. resident aliens to the IRS or to withhold tax from these payments. However, the university is required, in most cases, to report payments made to non-resident aliens (NRA) to the IRS, as well as to withhold tax from these payments.

Do not use this form if any portion of the non-qualified scholarship or fellowship is being provided to the student in consideration of the performance of teaching, research or other services by the student. Instead, please contact Payroll Services.

Do not use this form if an in-kind non-qualified scholarship or fellowship of good or services, rather than money, is being provided to a student to aid the student's education. Use the Non-Qualified Scholarship and Fellowship - In Kind Form [pdf]. Examples include paying for the student's lodging, travel, meals or buying personal property for the student such as a computer.

Note: A copy of the non-qualified scholarship or fellowship documentation must be attached to this form, otherwise it will not be processed. ALL PAYMENTS WILL BE SENT DIRECTLY TO THE RECIPIENT. CMU will issue the recipient's payment via Electronic Funds Transfer (EFT). The recipient must provide their banking information by submitting a completed Accounts Payable Supplier Electronic Funds Transfer Form [pdf].

Students should be advised to consult with their own personal tax advisor regarding income tax consequences of these payments.

Student Information

Student's Name: \_\_\_\_\_ Andrew ID: \_\_\_\_\_
Mailing Address Line 1: \_\_\_\_\_ Non-Qualified Scholarship or Fellowship Amount: \_\_\_\_\_
Mailing Address Line 2: \_\_\_\_\_ Ledger: \_\_\_\_\_
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ Contact Phone Number: \_\_\_\_\_

Have you (the requestor) reviewed the university's FCPA Guidance? \_\_\_\_\_

Describe any FCPA related concerns with the provided scholarship/fellowship: \_\_\_\_\_

Is the student a U.S. citizen or U.S. Taxing Resident? \_\_\_\_\_

If NO, the student must submit a Foreign National Information Form [pdf], as well as a Form W-8BEN with this request.

Accounting Information

Table with 7 columns: GL Amount, Object Code, Funding, Function, Activity, Organization, Entity. Includes rows for GM Amount\* and Expenditure Type (text).

\*Sponsored Projects Accounting (SPA) Signature is required if charging to a sponsored (1XXXXXX) award.

SPA Approver \_\_\_\_\_ Signature \_\_\_\_\_

Signature of Preparer (This individual will be contacted regarding any questions on the form.)

Preparer \_\_\_\_\_ Signature \_\_\_\_\_

Title \_\_\_\_\_ Phone Number \_\_\_\_\_

Administrative Leadership Group (ALG) Authorization

ALG Approver \_\_\_\_\_ Signature\* \_\_\_\_\_

\*Note: For Accounts Payable processing purposes, once the ALG Approver signature field is completed, the form will lock and no longer be editable.

I confirm by checking this box that the contact information provided for the recipient on this form is known good supplier information.

Submit completed form to Accounts Payable at ap-payform@andrew.cmu.edu.